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2018 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

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INSTITUTE FOR TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA

2018 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

Kara Grau, M.S.

6/14/2019

Nonresident travelers spend over $3 billion in Montana each year. This report looks at how the money spent is distributed across the six Montana travel regions, as well as 14 of the 56 counties in the state which receive the highest spending.

INSTITUTE FOR TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA

2018 Economic Contribution of Nonresident Travel Spending in Montana Regions and Counties

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Abstract

Money spent by those traveling in Montana has an effect directly on the businesses where spending occurs, and it ripples throughout the state's economy from there. Statewide, spending by nonresidents (averaged over two years—2017 and 2018 data) totaled $3.58 billion. This report details the methods and results of the economic impact analyses for each of Montana's travel regions, as well as analyses for counties in which nonresident travelers spent approximately $50 million or more.

Executive summary

Nonresident travelers spent $3.58 billion throughout Montana during 2018 (estimate is an average of 2017 and 2018 nonresident spending). This was an increase (10.5%) from the previous year's spending estimate of $3.24 billion (2016-2017 average).

- Glacier and Yellowstone travel regions received the highest percentage of nonresident spending, 34 and 31 percent, respectively.
- Of the 56 counties in Montana, Gallatin ($814 million) and Flathead ($614 million) Counties had the highest amount of spending.
- Fourteen counties had high enough nonresident traveler spending (~$50 million or greater) to allow for an economic impact analysis, the results of which are presented in the report.

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2018 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2019

Introduction

Nonresident spending is a significant contributor to Montana's economy. Money spent by those traveling to and through the state has an effect not only on the businesses where spending occurs, but it ripples throughout Montana's economy, both locally and regionally. Economic impact analysis allows us to observe the direct and indirect effects of the money spent by nonresident travelers in terms of the economic activity supported by this spending, and the number of jobs and labor income attributable to this spending, as well. This report is comprised of a collection of economic impact analyses for each of Montana's six travel regions, as well as 14 of the 56 counties in the state.

Methods

Expenditure Data

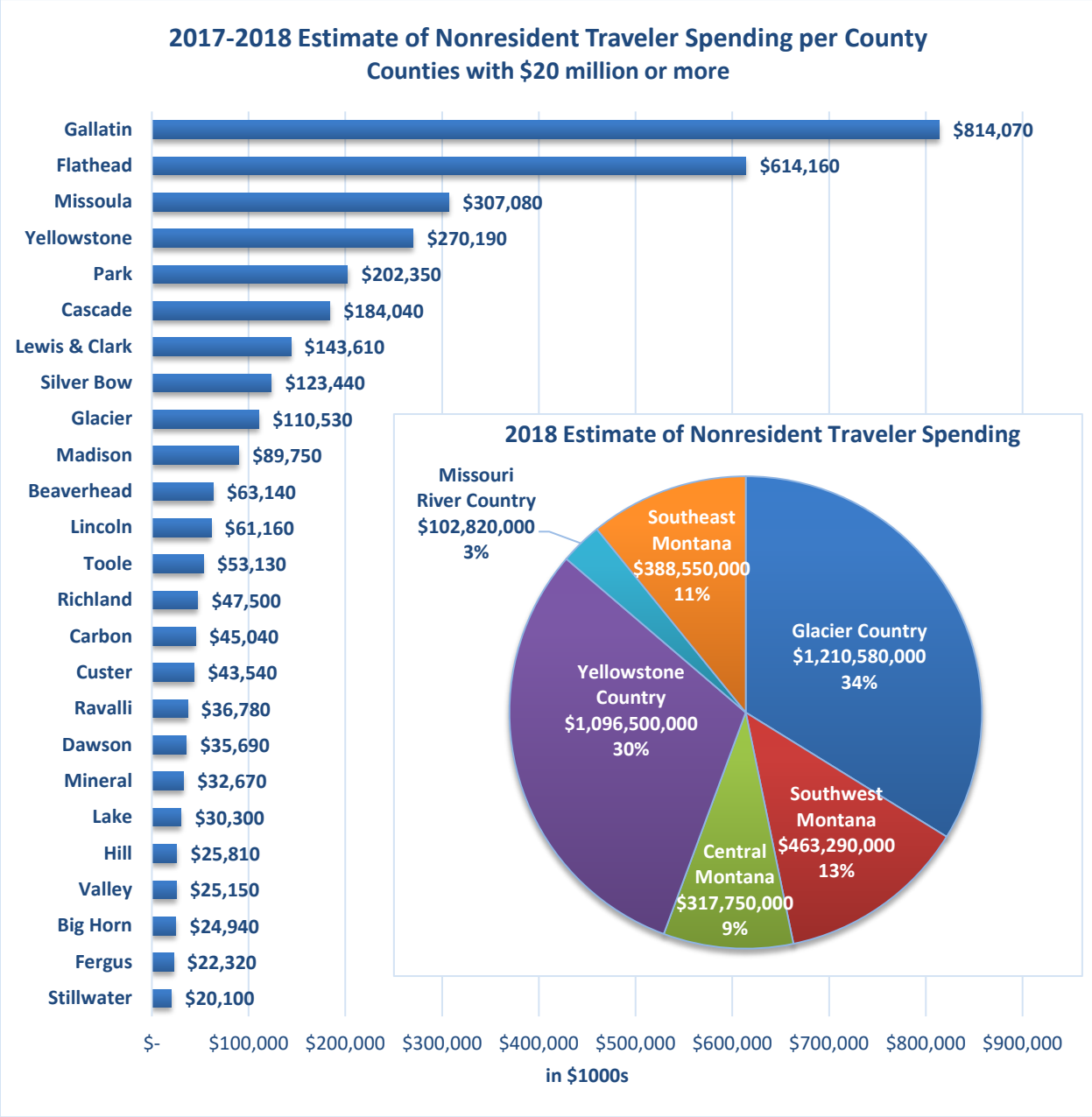
Nonresident spending data is collected at the statewide level, and estimates are based on average daily spending of visitor groups and the estimated number of visitor groups to Montana each year. To estimate the total spending at the county and region level, the reported spending patterns within each expenditure category are observed for each county in the state, and the state total spending amount is allocated to the counties appropriately.

Table 1 – 2017-2018 Average Nonresident Spending per Expenditure Category

Expenditure Category	2017-2018 Avg. Total Nonresident Spending (2018 $s)
Gasoline, Diesel	$812,146,000
Restaurant, Bar	$674,412,000
Hotel, Motel	$453,937,000
Outfitter, Guide	$395,810,000
Retail sales	$323,257,000
Groceries, Snacks	$259,819,000
Licenses, Entrance Fees	$224,542,000
Auto Rental	$134,713,000
Rental cabin, Condo	$100,449,000
Made in Montana	$82,700,000
Campground, RV Park	$42,513,000
Vehicle Repairs	$30,896,000
Misc. Services	$27,030,000
Gambling	$11,725,000
Farmers Market	$5,051,000
Transp. Fares	$487,000
TOTAL	$3,579,487,000

The statewide total 2017-2018 average spending is presented in Table 1. For the analyses highlighted in this report, the 2017 (inflation adjusted to 2018 $s) and 2018 county spending estimates were averaged. Doing so helps to account for small sample sizes within some counties and within some spending categories, and the variations in county spending patterns that may occur from year to year because of these small sample sizes. Figure 1 displays total spending in the counties which received an estimated $20 million or more in nonresident traveler spending. Total spending in the six travel regions is also included.

Figure 1 - County and Travel Region Spending Estimates, 2018



Presented in the following figures are the estimates of spending within the various expenditure categories by nonresidents for each of the selected counties (those in which nonresidents spent approximately $50 million or more) and travel regions. IMPLAN economic modeling software was used to estimate the economic impact of nonresident spending within each of the six travel regions. Additionally, estimates were produced for 14 of Montana's counties which had samples large enough to do so. To clarify, "nonresident spending" indicates money spent by travelers who do not have a permanent residence within Montana. It does not include Montana residents traveling within the state who may have spent money in a county other than the one in which they reside.

IMPLAN Analysis

An IMPLAN model was created for each of the 14 counties and six travel regions. Industry sectors corresponding to the expenditure categories were used in the models, and the dollar amounts for each county and region were input into the respective models accordingly.

The following 19 figures represent summaries for the individual counties and regions. Included in each summary is the estimated two-year average spending within each category and the economic impact within the county or region of that spending. The direct, indirect, induced and combined effects are included to provide a clear illustration of the ripple effect of nonresident spending at the local or regional scale.

In some cases, the economic impact to industry output (the value of goods and service produced by an industry which nonresidents purchase) is a smaller sum than the total amount of spending in a county or region. This is to be expected. On a regional basis, and particularly at the county level, much of the money spent in the area "leaks out." Generally, fewer industries exist at the local level than at the state level. Therefore, many supplies and goods must be purchased outside the local area, and can be considered imports. Hence, the dollar amount spent will not equal the Direct Industry Output figure unless everything required to produce the goods and services purchased by nonresident travelers is available within the region. This is particularly noticeable when looking at county level economic impacts, in which case much of the money spent within a county is leakage, and does not contribute to the impact.

Regions & Counties Included

The following regions are included in this report: Central Montana, Glacier Country, Missouri River Country, Southeast Montana, Southwest Montana, and Yellowstone Country.

The following counties are included: Beaverhead, Cascade, Flathead, Gallatin, Glacier, Lewis and Clark, Lincoln, Madison, Missoula, Park, Richland, Silver Bow, Toole and Yellowstone. Other counties totaled less than $50 million in nonresident spending, and were, therefore, not analyzed.

Conclusions & Recommendations

The reader must be aware that the estimates presented on the following pages are just that – estimates of nonresident traveler spending. It is not possible to collect actual figures of total spending by nonresidents throughout the year at each establishment, or within each industry, in the state. Therefore, estimates of spending are generated by ITRR based on both primary and secondary data. Survey data collected around the state throughout the year provide insight into average spending patterns and dollar amounts by travel groups. This data, combined with estimates of total visitation to the state, allow for the statewide, region, and county spending estimates to be produced. Sample sizes can vary from year to year within regions, as can the spending patterns of those respondents captured in the sample. This can result in significant variation year-to-year, and readers are urged to use caution when comparing the estimates in this report to any previous or forthcoming estimates of nonresident traveler spending.

Montana Travel Regions – 2018 Nonresident Economic Impacts

Central Montana - 6

Glacier Country - 7

Missouri River Country - 8

Southeast Montana - 9

Southwest Montana - 10

Yellowstone Country - 11

2018 Nonresident Traveler Expenditures & Economic Contribution in Central Montana Travel Region

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Central Montana Travel Region

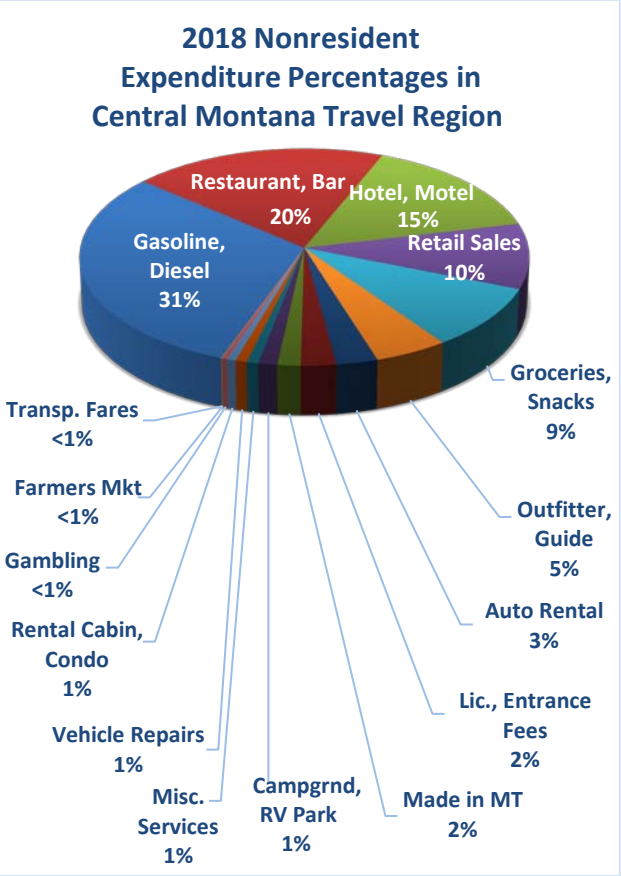


Table 1 - Total Nonresident Spending in Central Montana*,◊

Gasoline, Diesel	$97,640,000	Made in MT	$4,877,000
Restaurant, Bar	$63,121,000	Campgrnd, RV Park	$3,959,000
Hotel, Motel	$48,268,000	Misc. Services	$2,470,000
Retail Sales	$30,887,000	Vehicle Repairs	$2,399,000
Groceries, Snacks	$29,159,000	Rental Cabin, Condo	$1,882,000
Outfitter, Guide	$15,551,000	Gambling	$1,131,000
Auto Rental	$8,761,000	Farmers Mkt	$145,000
Lic., Entrance Fees	$7,427,000	Transp. Fares	$69,000
		TOTAL	**$317,746,000**

2018 Contribution of Nonresident Traveler Expenditures in Central Montana Travel Region

- 2018 average spending* in Central Montana by nonresident visitors to Montana totaled $317.7 million.
- This $317.7 million in local spending directly supports $254.7 million of economic activity in the region, and supports an additional $134.0 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $388.7 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$254,682,000	$67,946,000	$66,067,000	$388,695,000
Employment (# of jobs)	3,420	490	560	4,470
Employee Compensation	$66,438,000	$15,065,000	$17,284,000	$98,787,000
Proprietor Income	$12,394,000	$4,825,000	$3,295,000	$20,514,000
Other Property Type Income	$27,456,000	$10,146,000	$10,884,000	$48,486,000
State & Local Taxes^	–	–	–	$16,327,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

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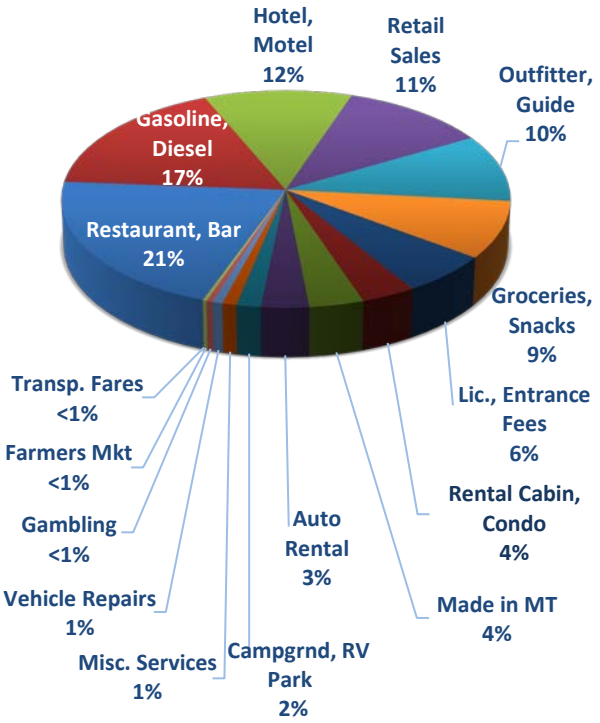
2018 Nonresident Traveler Expenditures & Economic Contribution in Glacier Country Travel Region

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Glacier Country Travel Region

Table 1 - Total Nonresident Spending in Glacier Country*,◊

Restaurant, Bar	$250,027,000	Made in MT	$43,963,000
Gasoline, Diesel	$210,804,000	Auto Rental	$38,449,000
Hotel, Motel	$139,887,000	Campground, RV Park	$19,573,000
Retail Sales	$138,576,000	Misc. Services	$11,435,000
Outfitter, Guide	$121,143,000	Vehicle Repairs	$8,075,000
Groceries, Snacks	$103,404,000	Gambling	$5,071,000
Lic., Entrance Fees	$72,694,000	Farmers Market	$3,151,000
Rental Cabin, Condo	$44,089,000	Transportation Fares	$240,000
		TOTAL	**$1,210,581,000**



2018 Contribution of Nonresident Traveler Expenditures in Glacier Country Travel Region

- 2018 average spending* in Glacier Country by nonresident visitors to Montana totaled $1.21 billion.
- This $1.21 billion in local spending directly supports $898.7 million of economic activity in the region, and supports an additional $640.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $1.54 billion.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$898,697,000	$310,217,000	$330,400,000	$1,539,314,000
Employment (# of jobs)	15,515	2,450	2,920	20,885
Employee Compensation	$300,391,000	$65,953,000	$88,066,000	$454,410,000
Proprietor Income	$49,728,000	$16,934,000	$14,730,000	$81,392,000
Other Property Type Income	$79,314,000	$67,110,000	$62,254,000	$208,678,000
State & Local Taxes^	–	–	–	$67,629,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Missouri River Country Travel Region

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Missouri River Country Travel Region

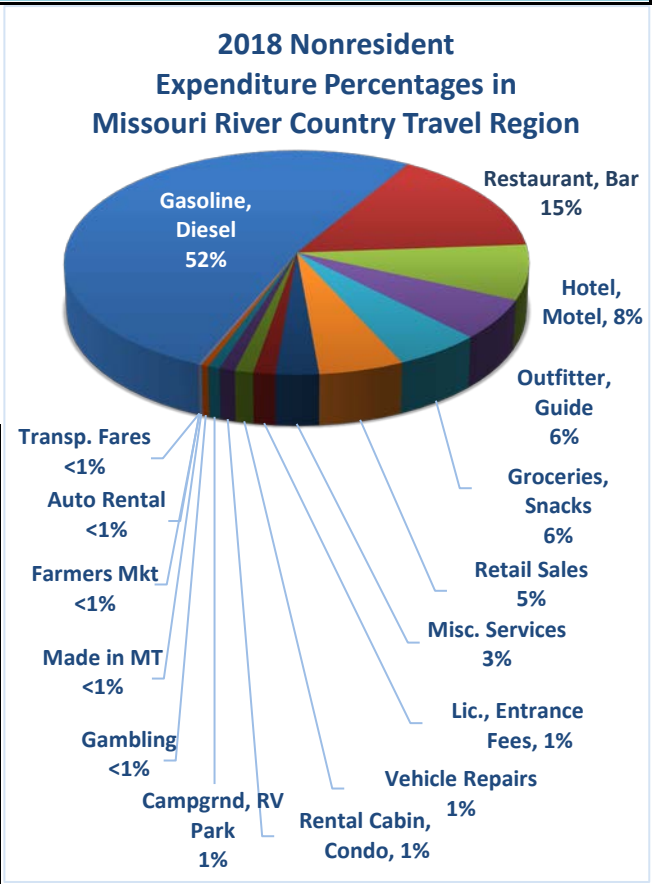

Table 1 - Total Nonresident Spending in Missouri River Country*,◊

Gasoline, Diesel	$53,678,000	Vehicle Repairs	$1,206,000
Restaurant, Bar	$15,662,000	Rental Cabin, Condo	$1,044,000
Hotel, Motel	$8,166,000	Campground, RV Park	$782,000
Outfitter, Guide	$6,025,000	Gambling	$460,000
Groceries, Snacks	$5,690,000	Made in MT	$189,000
Retail Sales	$5,585,000	Farmers Market	$48,000
Misc. Services	$2,835,000	Auto Rental	*Insufficient Sample Size*
Lic., Entrance Fees	$1,445,000	Transportation Fares	*Insufficient Sample Size*
		TOTAL	**$102,815,000**

2018 Contribution of Nonresident Traveler Expenditures in Missouri River Country Travel Region

- 2018 average spending* in Missouri River Country by nonresident visitors to Montana totaled $102.8 million.
- This $102.8 million in local spending directly supports $68.4 million of economic activity in the region, and supports an additional $30.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $98.5 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$68,437,000	$15,770,000	$14,295,000	$98,502,000
Employment (# of jobs)	960	110	120	1,190
Employee Compensation	$21,563,000	$3,686,000	$3,389,000	$28,638,000
Proprietor Income	$5,013,000	$697,000	$617,000	$6,327,000
Other Property Type Income	$4,720,000	$1,943,000	$2,561,000	$9,224,000
State & Local Taxes^	–	–	–	$7,921,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Southeast Montana Travel Region

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Southeast Montana Travel Region

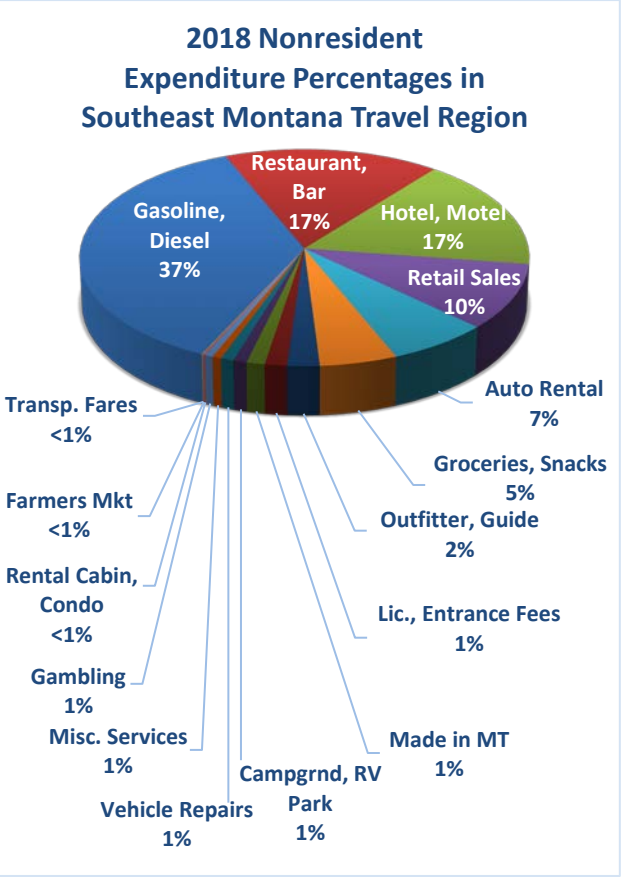

Table 1 - Total Nonresident Spending in Southeast Montana*,◊

Gasoline, Diesel	$143,234,000	Made in MT	$4,696,000
Restaurant, Bar	$65,401,000	Campground, RV Park	$3,503,000
Hotel, Motel	$64,693,000	Vehicle Repairs	$3,333,000
Retail Sales	$38,003,000	Misc. Services	$2,324,000
Auto Rental	$26,232,000	Gambling	$2,138,000
Groceries, Snacks	$20,020,000	Rental Cabin, Condo	$655,000
Outfitter, Guide	$8,359,000	Farmers Market	$205,000
Lic., Entrance Fees	$5,691,000	Transportation Fares	$67,000
		TOTAL	**$388,554,000**

2018 Contribution of Nonresident Traveler Expenditures in Southeast Montana Travel Region

- 2018 average spending* in Southeast Montana by nonresident visitors to Montana totaled $388.6 million.
- This $388.6 million in local spending directly supports $322.2 million of economic activity in the region, and supports an additional $194.7 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $516.7 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$322,208,000	$98,282,000	$96,372,000	$516,862,000
Employment (# of jobs)	3,450	630	750	4,830
Employee Compensation	$87,936,000	$24,307,000	$27,238,000	$139,481,000
Proprietor Income	$9,459,000	$4,806,000	$3,291,000	$17,556,000
Other Property Type Income	$55,817,000	$18,931,000	$18,563,000	$93,311,000
State & Local Taxes^	–	–	–	$22,345,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

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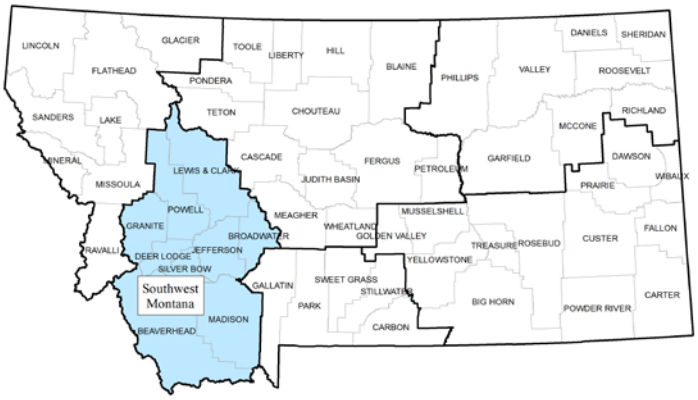
2018 Nonresident Traveler Expenditures & Economic Contribution in Southwest Montana Travel Region

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Southwest Montana Travel Region



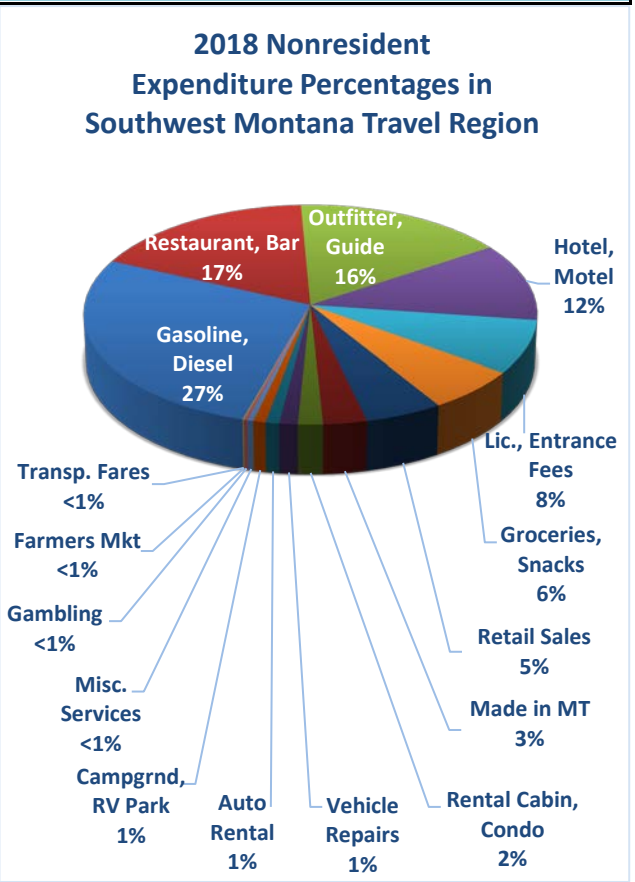


Table 1 - Total Nonresident Spending in Southwest Montana*,◊

Gasoline, Diesel	$126,870,000	Rental Cabin, Condo	$7,577,000
Restaurant, Bar	$80,824,000	Vehicle Repairs	$5,555,000
Outfitter, Guide	$75,874,000	Auto Rental	$4,155,000
Hotel, Motel	$53,515,000	Campground, RV Park	$3,761,000
Lic., Entrance Fees	$36,270,000	Misc. Services	$1,859,000
Groceries, Snacks	$28,515,000	Gambling	$1,123,000
Retail Sales	$23,668,000	Farmers Market	$353,000
Made in MT	$13,337,000	Transportation Fares	$36,000
		TOTAL	**$463,292,000**

2018 Contribution of Nonresident Traveler Expenditures in Southwest Montana Travel Region

- 2018 average spending* in Southwest Montana by nonresident visitors to Montana totaled $463.3 million.
- This $463.3 million in local spending directly supports $331.7 million of economic activity in the region, and supports an additional $191.5 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $523.3 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$331,739,000	$78,362,000	$113,178,000	$523,279,000
Employment (# of jobs)	4,790	610	960	6,360
Employee Compensation	$126,019,000	$18,124,000	$30,390,000	$174,533,000
Proprietor Income	$23,983,000	$5,162,000	$5,699,000	$34,844,000
Other Property Type Income	$32,717,000	$12,646,000	$19,768,000	$65,131,000
State & Local Taxes^	–	–	–	$24,278,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone Country Travel Region

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Yellowstone Country Travel Region

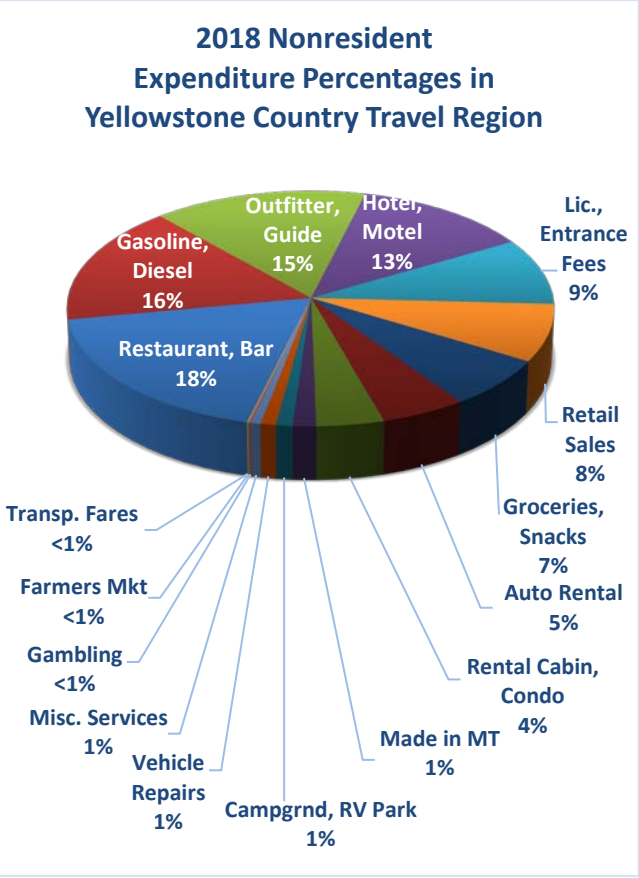

Table 1 - Total Nonresident Spending in Yellowstone Country*,◊

Restaurant, Bar	$199,378,000	Rental Cabin, Condo	$45,202,000
Gasoline, Diesel	$179,920,000	Made in MT	$15,638,000
Outfitter, Guide	$168,857,000	Campground, RV Park	$10,935,000
Hotel, Motel	$139,409,000	Vehicle Repairs	$10,328,000
Lic., Entrance Fees	$101,015,000	Misc. Services	$6,107,000
Retail Sales	$86,539,000	Gambling	$1,802,000
Groceries, Snacks	$73,033,000	Farmers Market	$1,149,000
Auto Rental	$57,116,000	Transportation Fares	$74,000
		TOTAL	**$1,096,502,000**

2018 Contribution of Nonresident Traveler Expenditures in Yellowstone Country Travel Region

- 2018 average spending* in Yellowstone Country by nonresident visitors to Montana totaled $1.09 billion.
- This $1.09 billion in local spending directly supports $858.5 million of economic activity in the region, and supports an additional $528.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $1.39 billion.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$858,501,000	$270,589,000	$258,227,000	$1,387,317,000
Employment (# of jobs)	13,860	2,100	2,210	18,170
Employee Compensation	$309,128,000	$59,211,000	$67,002,000	$435,341,000
Proprietor Income	$28,512,000	$14,982,000	$11,701,000	$55,195,000
Other Property Type Income	$87,026,000	$61,639,000	$52,212,000	$200,877,000
State & Local Taxes^	–	–	–	$61,415,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

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Montana Counties – 2018 Nonresident Economic Impacts

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2018 Nonresident Traveler Expenditures & Economic Contribution in Beaverhead County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Beaverhead County

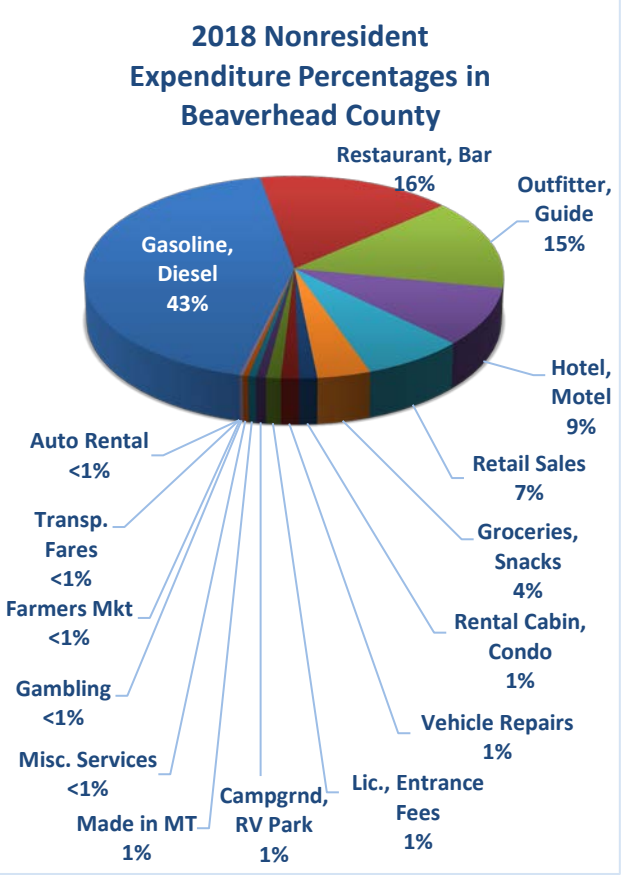

Table 1 - Total Nonresident Spending in Beaverhead County*,◊

Gasoline, Diesel	$27,313,000	Lic., Entrance Fees	$654,000
Restaurant, Bar	$10,289,000	Campground, RV Park	$450,000
Outfitter, Guide	$9,239,000	Made in MT	$350,000
Hotel, Motel	$5,846,000	Misc. Services	$244,000
Retail Sales	$4,591,000	Gambling	$103,000
Groceries, Snacks	$2,397,000	Farmers Market	$53,000
Rental Cabin, Condo	$807,000	Auto Rental	*Insufficient Sample Size*
Vehicle Repairs	$807,000	Transportation Fares	*Insufficient Sample Size*
		TOTAL	**$63,143,000**

2018 Contribution of Nonresident Traveler Expenditures in Beaverhead County

- 2018 average spending* in Beaverhead County by nonresident visitors to Montana totaled $63.1 million.
- This $63.1 million in local spending directly supports $39.7 million of economic activity in the region, and supports an additional $16.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $56.5 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$39,707,000	$8,577,000	$8,209,000	$56,493,000
Employment (# of jobs)	700	80	70	850
Employee Compensation	$13,625,000	$1,464,000	$1,882,000	$16,971,000
Proprietor Income	$1,300,000	$467,000	$332,000	$2,099,000
Other Property Type Income	$3,020,000	$1,708,000	$1,663,000	$6,391,000
State & Local Taxes^	–	–	–	$2,852,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Cascade County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Cascade County

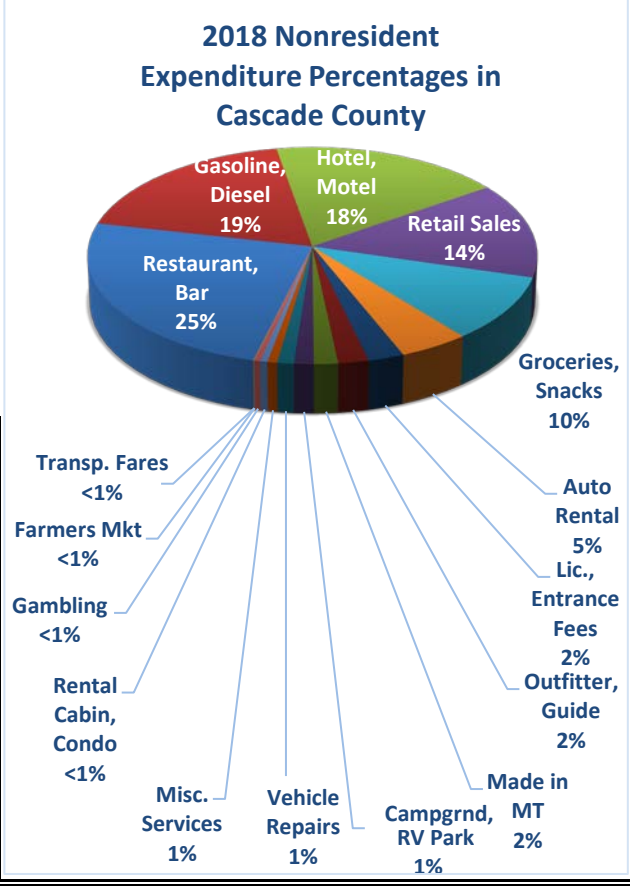

Table 1 - Total Nonresident Spending in Cascade County*,◊

Restaurant, Bar	$45,294,000	Made in MT	$2,919,000
Gasoline, Diesel	$34,455,000	Campground, RV Park	$2,418,000
Hotel, Motel	$33,214,000	Vehicle Repairs	$2,021,000
Retail Sales	$26,305,000	Misc. Services	$1,172,000
Groceries, Snacks	$17,753,000	Rental Cabin, Condo	$867,000
Auto Rental	$8,590,000	Gambling	$780,000
Lic., Entrance Fees	$4,399,000	Farmers Market	$79,000
Outfitter, Guide	$3,740,000	Transportation Fares	$31,000
		TOTAL	**$184,037,000**

2018 Contribution of Nonresident Traveler Expenditures in Cascade County

- 2018 average spending* in Cascade County by nonresident visitors to Montana totaled $184.0 million.
- This $184.0 million in local spending directly supports $147.2 million of economic activity in the region, and supports an additional $89.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $236.8 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$147,156,000	$42,398,000	$47,232,000	$236,786,000
Employment (# of jobs)	2,130	300	390	2,820
Employee Compensation	$41,921,000	$10,788,000	$13,323,000	$66,032,000
Proprietor Income	$7,255,000	$2,279,000	$2,303,000	$11,837,000
Other Property Type Income	$16,602,000	$7,086,000	$7,592,000	$31,280,000
State & Local Taxes^	–	–	–	$9,365,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Flathead County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Flathead County

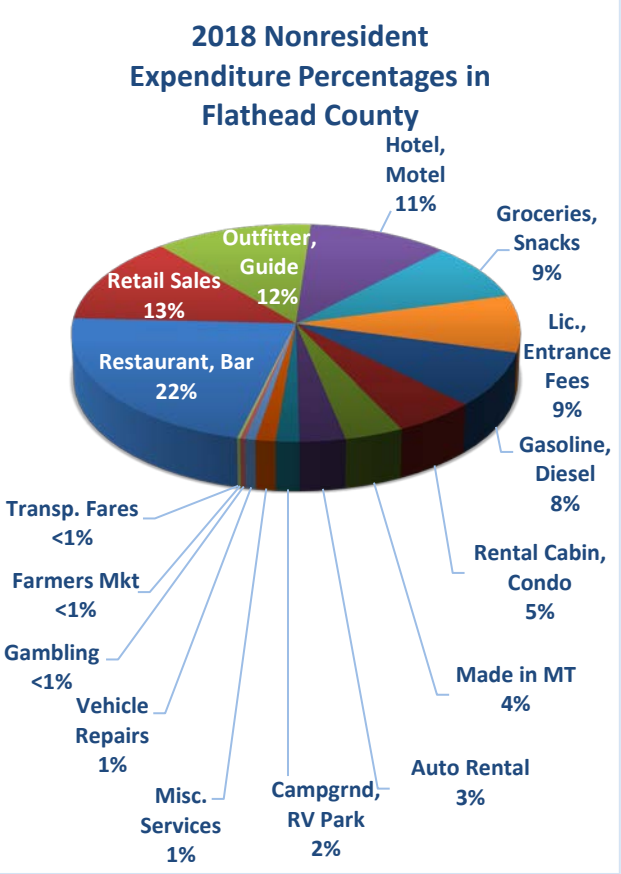

Table 1 - Total Nonresident Spending in Flathead County*,◊

Restaurant, Bar	$134,455,000	Made in MT	$24,010,000
Retail Sales	$80,343,000	Auto Rental	$18,794,000
Outfitter, Guide	$75,525,000	Campground, RV Park	$9,572,000
Hotel, Motel	$67,502,000	Misc. Services	$8,110,000
Groceries, Snacks	$52,958,000	Vehicle Repairs	$4,294,000
Lic., Entrance Fees	$52,248,000	Gambling	$1,870,000
Gasoline, Diesel	$49,741,000	Farmers Market	$1,304,000
Rental Cabin, Condo	$33,284,000	Transportation Fares	$150,000
		TOTAL	**$614,160,000**

2018 Contribution of Nonresident Traveler Expenditures in Flathead County

- 2018 average spending* in Flathead County by nonresident visitors to Montana totaled $614.2 million.
- This $614.2 million in local spending directly supports $486.5 million of economic activity in the region, and supports an additional $338.0 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $824.5 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$486,536,000	$161,572,000	$176,433,000	$824,541,000
Employment (# of jobs)	8,550	1,340	1,570	11,460
Employee Compensation	$170,392,000	$33,407,000	$47,066,000	$250,865,000
Proprietor Income	$23,258,000	$11,364,000	$9,668,000	$44,290,000
Other Property Type Income	$45,012,000	$35,118,000	$32,779,000	$112,909,000
State & Local Taxes^	–	–	–	$35,171,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Gallatin County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Gallatin County

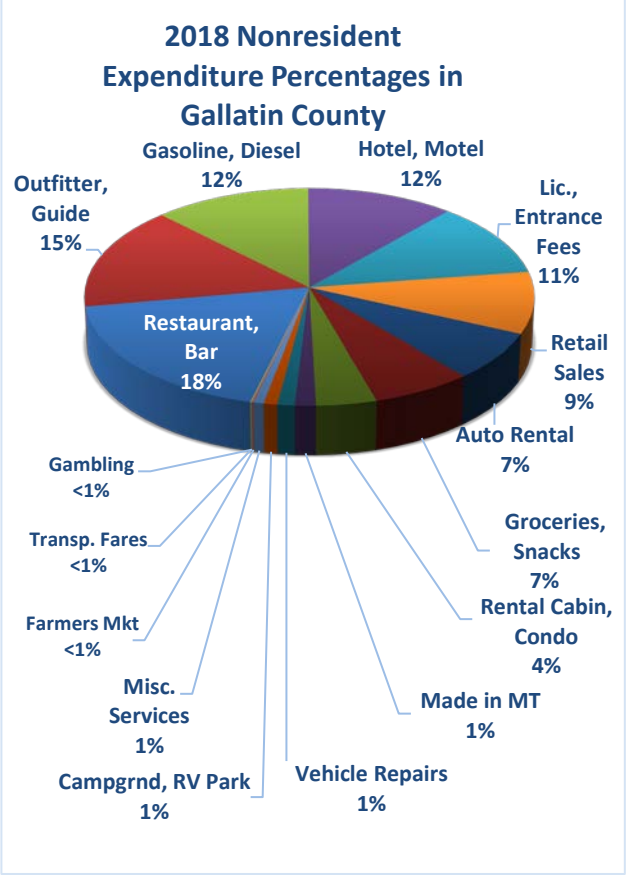

Table 1 - Total Nonresident Spending in Gallatin County*,◊

Restaurant, Bar	$148,989,000	Rental Cabin, Condo	$32,724,000
Outfitter, Guide	$125,864,000	Made in MT	$11,321,000
Gasoline, Diesel	$99,907,000	Vehicle Repairs	$9,278,000
Hotel, Motel	$93,664,000	Campground, RV Park	$7,365,000
Lic., Entrance Fees	$91,340,000	Misc. Services	$5,465,000
Retail Sales	$74,790,000	Farmers Market	$1,002,000
Auto Rental	$57,116,000	Gambling	$763,000
Groceries, Snacks	$54,407,000	Transportation Fares	$74,000
		TOTAL	**$814,069,000**

2018 Contribution of Nonresident Traveler Expenditures in Gallatin County

- 2018 average spending* in Gallatin County by nonresident visitors to Montana totaled $814.1 million.
- This $814.1 million in local spending directly supports $656.9 million of economic activity in the region, and supports an additional $427.5 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $1.08 billion.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$656,889,000	$211,550,000	$215,945,000	$1,084,384,000
Employment (# of jobs)	10,460	1,610	1,830	13,900
Employee Compensation	$239,623,000	$46,958,000	$58,989,000	$345,570,000
Proprietor Income	$22,302,000	$11,707,000	$9,703,000	$43,712,000
Other Property Type Income	$64,170,000	$50,203,000	$42,504,000	$156,877,000
State & Local Taxes^	–	–	–	$48,545,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Glacier County

by Kara Grau, M.S.

2016 Nonresident Traveler Expenditures in Glacier County

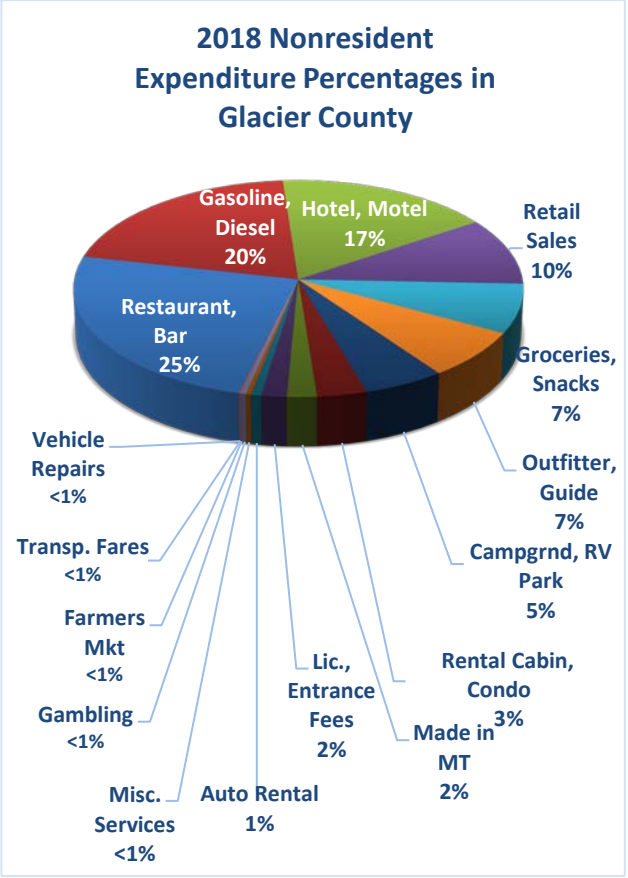

Table 1 - Total Nonresident Spending in Glacier County*,◊

Restaurant, Bar	$27,149,000	Made in MT	$2,174,000
Gasoline, Diesel	$22,500,000	Lic., Entrance Fees	$1,874,000
Hotel, Motel	$18,540,000	Auto Rental	$759,000
Retail Sales	$11,098,000	Misc. Services	$366,000
Groceries, Snacks	$8,122,000	Gambling	$295,000
Outfitter, Guide	$7,822,000	Farmers Market	$185,000
ampground, RV Park	$5,981,000	Transportation Fares	$4,000
Rental Cabin, Condo	$3,658,000	Vehicle Repairs	*Insufficient Sample Size*
		TOTAL	**$110,527,000**

2018 Contribution of Nonresident Traveler Expenditures in Glacier County

- 2018 average spending* in Glacier County by nonresident visitors to Montana totaled $110.5 million.
- This $110.5 million in local spending directly supports $78.0 million of economic activity in the region, and supports an additional $23.2 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $101.2 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$77,969,000	$12,201,000	$11,047,000	$101,217,000
Employment (# of jobs)	1,370	90	90	1,550
Employee Compensation	$25,211,000	$2,596,000	$2,411,000	$30,218,000
Proprietor Income	$4,549,000	$735,000	$415,000	$5,699,000
Other Property Type Income	$7,006,000	$1,341,000	$2,155,000	$10,502,000
State & Local Taxes^	–	–	–	$4,387,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Lincoln County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Lincoln

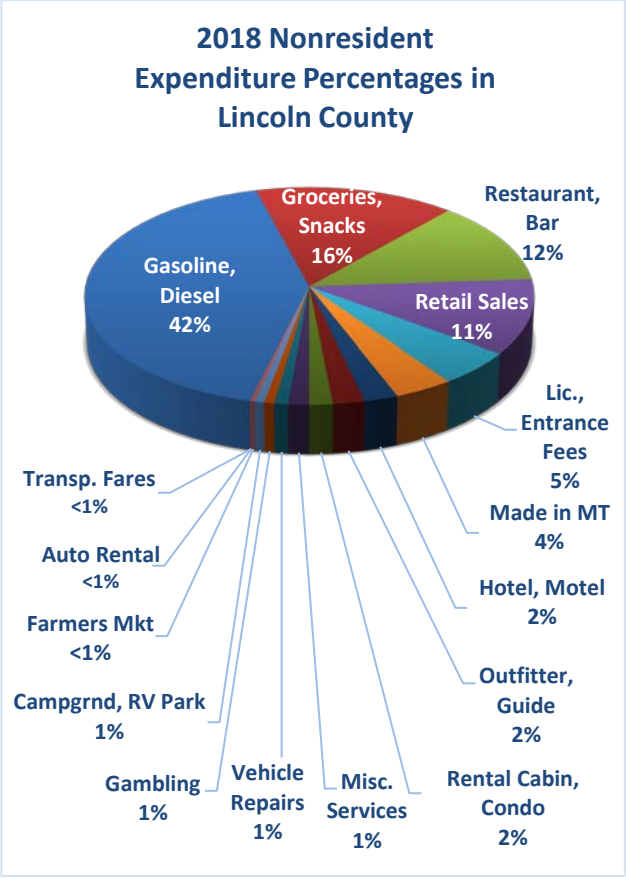

Table 1 - Total Nonresident Spending in Lincoln County*,◊

Gasoline, Diesel	$25,677,000	Rental Cabin, Condo	$949,000
Groceries, Snacks	$9,561,000	Misc. Services	$846,000
Restaurant, Bar	$7,581,000	Vehicle Repairs	$554,000
Retail Sales	$6,832,000	Gambling	$405,000
Lic., Entrance Fees	$3,129,000	Campground, RV Park	$401,000
Made in MT	$2,389,000	Farmers Market	$173,000
Hotel, Motel	$1,379,000	Auto Rental	*Insufficient Sample Size*
Outfitter, Guide	$1,287,000	Transportation Fares	*Insufficient Sample Size*
		TOTAL	**$61,163,000**

2018 Contribution of Nonresident Traveler Expenditures in Lincoln County

- 2018 average spending* in Lincoln County by nonresident visitors to Montana totaled $61.2 million.
- This $61.2 million in local spending directly supports $32.1 million of economic activity in the region, and supports an additional $14.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $47.1 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$32,148,000	$7,322,000	$7,613,000	$47,083,000
Employment (# of jobs)	520	60	70	650
Employee Compensation	$10,302,000	$1,062,000	$1,597,000	$12,961,000
Proprietor Income	$2,838,000	$384,000	$302,000	$3,524,000
Other Property Type Income	$2,033,000	$1,565,000	$1,583,000	$5,181,000
State & Local Taxes^	–	–	–	$2,432,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Lewis and Clark County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Lewis and Clark

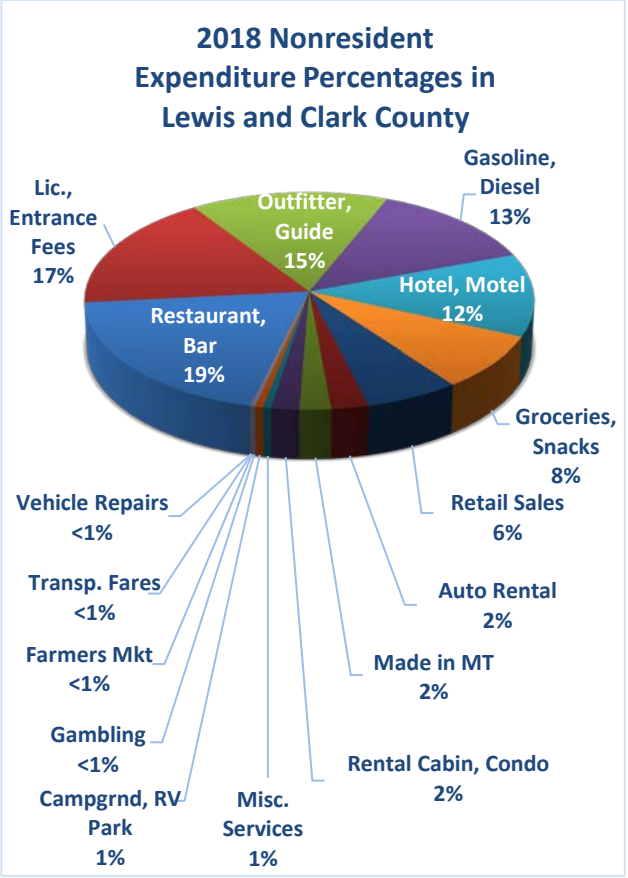

Table 1 - Total Nonresident Spending in Lewis and Clark County*,◊

Restaurant, Bar	$27,992,000	Made in MT	$3,011,000
Lic., Entrance Fees	$24,908,000	Rental Cabin, Condo	$2,633,000
Outfitter, Guide	$22,112,000	Misc. Services	$797,000
Gasoline, Diesel	$18,955,000	Campground, RV Park	$761,000
Hotel, Motel	$17,725,000	Gambling	$297,000
Groceries, Snacks	$11,695,000	Farmers Market	$135,000
Retail Sales	$8,983,000	Transportation Fares	$25,000
Auto Rental	$3,571,000	Vehicle Repairs	$7,000
		TOTAL	**$143,607,000**

2018 Contribution of Nonresident Traveler Expenditures in Lewis and Clark County

- 2018 average spending* in Lewis & Clark County by nonresident visitors to Montana totaled $143.6 million.
- This $143.6 million in local spending directly supports $113.7 million of economic activity in the region, and supports an additional $71.7 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $185.4 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$113,693,000	$33,788,000	$37,891,000	$185,372,000
Employment (# of jobs)	1,960	260	320	2,540
Employee Compensation	$36,745,000	$8,444,000	$10,967,000	$56,156,000
Proprietor Income	$7,586,000	$1,392,000	$1,332,000	$10,310,000
Other Property Type Income	$10,147,000	$6,107,000	$6,637,000	$22,891,000
State & Local Taxes^	–	–	–	$8,608,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Madison County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Madison County

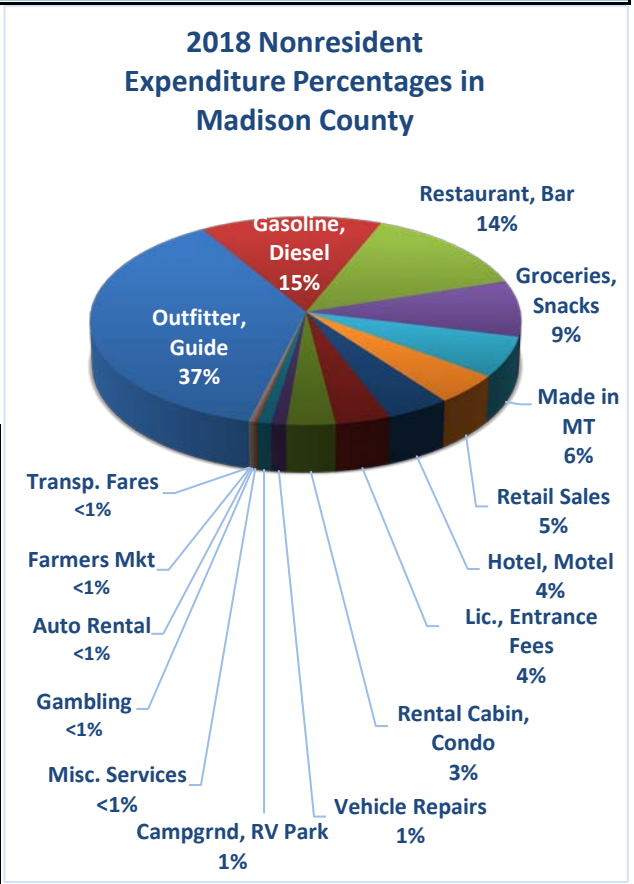

Table 1 - Total Nonresident Spending in Madison County*,◊

Outfitter, Guide	$33,626,000	Rental Cabin, Condo	$3,013,000
Gasoline, Diesel	$13,274,000	Vehicle Repairs	$934,000
Restaurant, Bar	$12,498,000	Campground, RV Park	$908,000
Groceries, Snacks	$7,834,000	Misc. Services	$185,000
Made in MT	$5,614,000	Gambling	$127,000
Retail Sales	$4,217,000	Auto Rental	$87,000
Hotel, Motel	$3,964,000	Farmers Market	$54,000
Lic., Entrance Fees	$3,416,000	Transportation Fares	*Insufficient Sample Size*
		TOTAL	**$89,751,000**

2018 Contribution of Nonresident Traveler Expenditures in Madison County

- 2018 average spending* in Madison County by nonresident visitors to Montana totaled $89.8 million.
- This $89.8 million in local spending directly supports $68.8 million of economic activity in the region, and supports an additional $24.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $93.7 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$68,834,000	$11,044,000	$13,819,000	$93,697,000
Employment (# of jobs)	960	90	120	1,170
Employee Compensation	$33,190,000	$1,830,000	$2,813,000	$37,833,000
Proprietor Income	$2,442,000	$929,000	$604,000	$3,975,000
Other Property Type Income	$6,886,000	$2,868,000	$3,561,000	$13,315,000
State & Local Taxes^	–	–	–	$3,807,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Missoula County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Missoula County

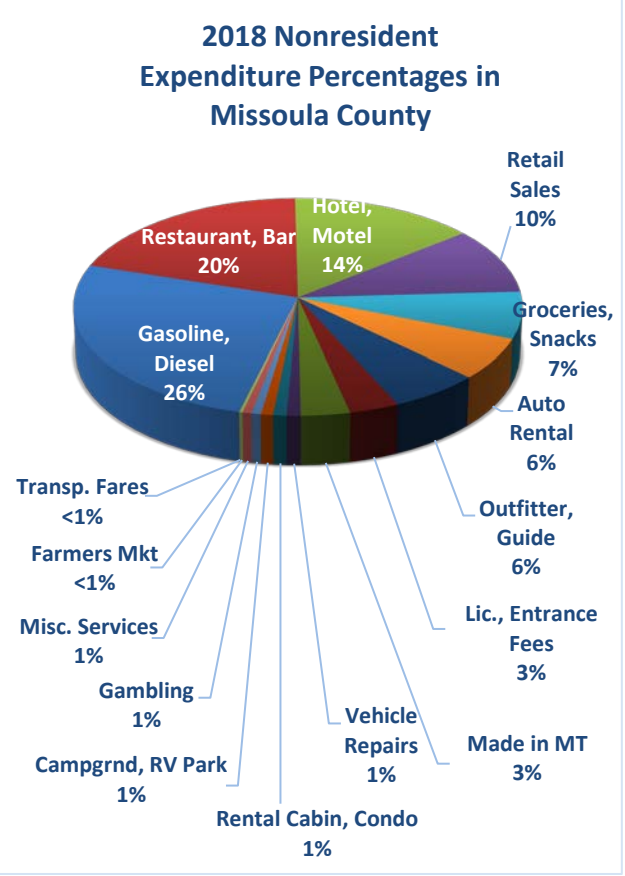

Table 1 - Total Nonresident Spending in Missoula County*,◊

Gasoline, Diesel	$79,951,000	Made in MT	$10,022,000
Restaurant, Bar	$60,983,000	Vehicle Repairs	$2,831,000
Hotel, Motel	$44,246,000	Rental Cabin, Condo	$2,728,000
Retail Sales	$30,500,000	Campground, RV Park	$2,453,000
Groceries, Snacks	$21,369,000	Gambling	$1,931,000
Auto Rental	$18,818,000	Misc. Services	$1,811,000
Outfitter, Guide	$18,523,000	Farmers Market	$678,000
Lic., Entrance Fees	$10,145,000	Transportation Fares	$86,000
		TOTAL	**$307,075,000**

2018 Contribution of Nonresident Traveler Expenditures in Missoula County

- 2018 average spending* in Missoula County by nonresident visitors to Montana totaled $307.1 million.
- This $307.1 million in local spending directly supports $221.0 million of economic activity in the region, and supports an additional $168.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $389.9 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$221,048,000	$84,474,000	$84,386,000	$389,908,000
Employment (# of jobs)	3,580	620	730	4,930
Employee Compensation	$70,471,000	$20,050,000	$23,873,000	$114,394,000
Proprietor Income	$13,323,000	$3,580,000	$3,277,000	$20,180,000
Other Property Type Income	$17,753,000	$19,953,000	$16,375,000	$54,081,000
State & Local Taxes^	–	–	–	$18,160,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Park County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Park County

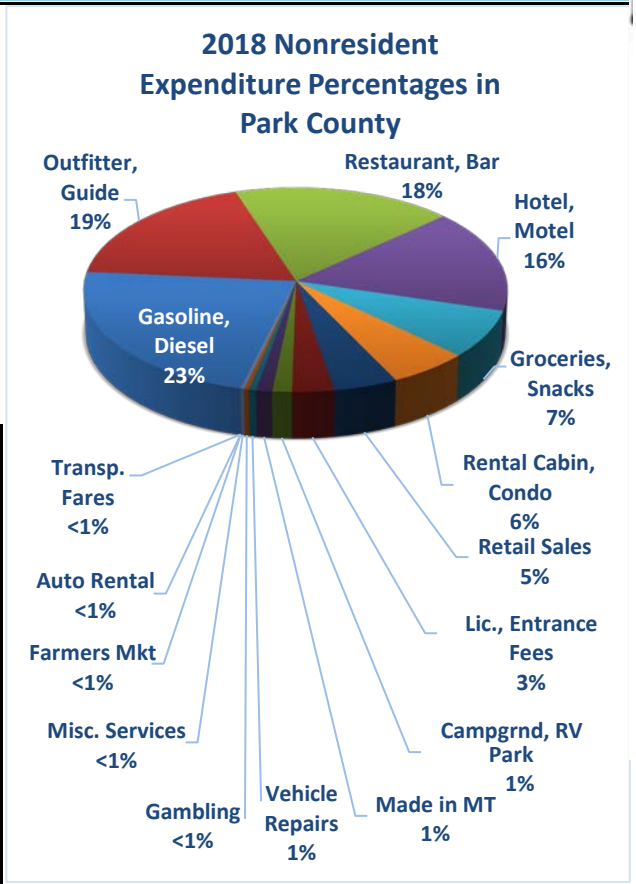

Table 1 - Total Nonresident Spending in Park County*,◊

Gasoline, Diesel	$45,671,000	Campground, RV Park	$2,760,000
Outfitter, Guide	$37,490,000	Made in MT	$2,283,000
Restaurant, Bar	$36,825,000	Vehicle Repairs	$1,023,000
Hotel, Motel	$33,290,000	Gambling	$632,000
Groceries, Snacks	$15,155,000	Misc. Services	$525,000
Rental Cabin, Condo	$11,571,000	Farmers Market	$63,000
Retail Sales	$9,107,000	Auto Rental	*Insufficient Sample Size*
Lic., Entrance Fees	$5,954,000	Transportation Fares	*Insufficient Sample Size*
		TOTAL	**$202,349,000**

2018 Contribution of Nonresident Traveler Expenditures in Park County

- 2018 average spending* in Park County by nonresident visitors to Montana totaled $202.3 million.
- This $202.3 million in local spending directly supports $147.4 million of economic activity in the region, and supports an additional $53.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $201.3 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$147,391,000	$28,606,000	$25,269,000	$201,266,000
Employment (# of jobs)	2,650	300	240	3,190
Employee Compensation	$51,533,000	$5,494,000	$6,248,000	$63,275,000
Proprietor Income	$5,824,000	$1,469,000	$897,000	$8,190,000
Other Property Type Income	$12,950,000	$6,900,000	$5,624,000	$25,474,000
State & Local Taxes^	–	–	–	$8,325,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Richland County

by Kara Grau, M.S.

2016 Nonresident Traveler Expenditures in Richland County

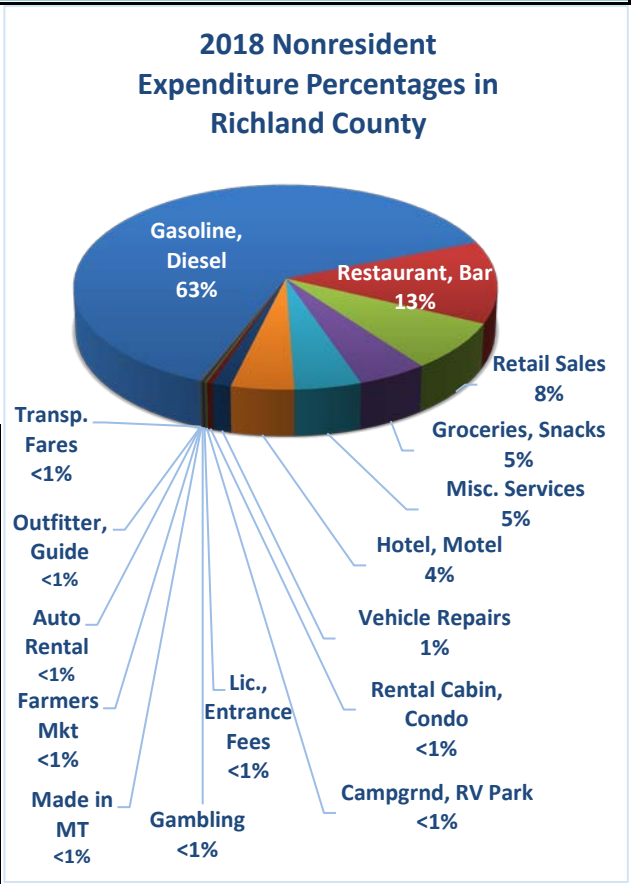

Table 1 - Total Nonresident Spending in Richland County*,◊

Gasoline, Diesel	$29,896,000	Campground, RV Park	$81,000
Restaurant, Bar	$6,183,000	Lic., Entrance Fees	$79,000
Retail Sales	$3,671,000	Gambling	$56,000
Groceries, Snacks	$2,332,000	Made in MT	$36,000
Misc. Services	$2,237,000	Farmers Market	$8,000
Hotel, Motel	$2,110,000	Auto Rental	*Insufficient Sample Size*
Vehicle Repairs	$627,000	Outfitter, Guide	*Insufficient Sample Size*
Rental Cabin, Condo	$187,000	Transportation Fares	*Insufficient Sample Size*
		TOTAL	**$47,503,000**

2018 Contribution of Nonresident Traveler Expenditures in Richland County

- 2018 average spending* in Richland County by nonresident visitors to Montana totaled $47.5 million.
- This $47.5 million in local spending directly supports $23.7 million of economic activity in the region, and supports an additional $9.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $32.8 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$23,695,000	$4,041,000	$5,048,000	$32,784,000
Employment (# of jobs)	290	20	40	350
Employee Compensation	$9,565,000	$1,043,000	$1,321,000	$11,929,000
Proprietor Income	$1,633,000	$164,000	$219,000	$2,016,000
Other Property Type Income	$2,103,000	$676,000	$920,000	$3,699,000
State & Local Taxes^	–	–	–	$1,643,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2016 $s) was used to help account for small and varying sample sizes at the county level.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Silver Bow County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Silver Bow County

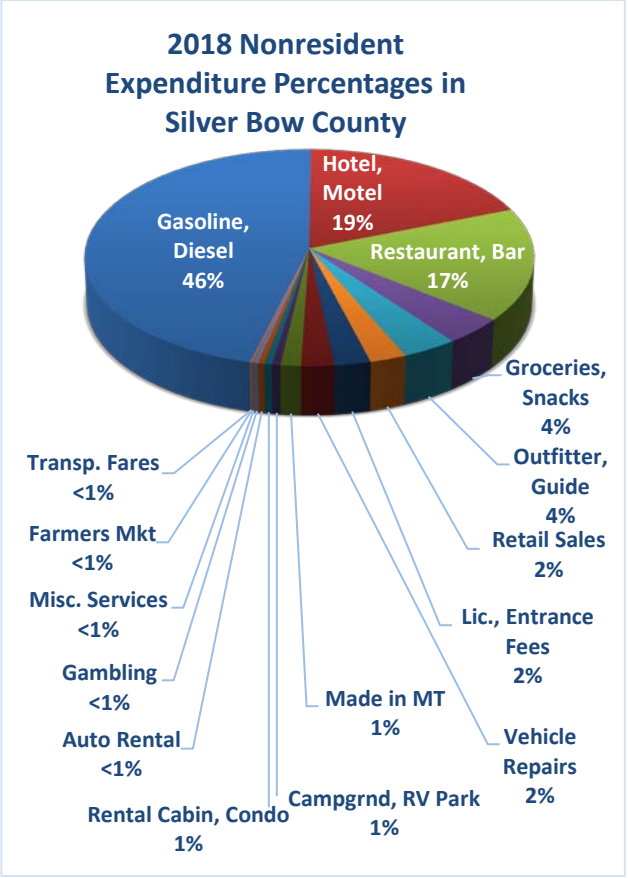

Table 1 - Total Nonresident Spending in Silver Bow County*,◊

Gasoline, Diesel	$57,094,000	Made in MT	$1,668,000
Hotel, Motel	$23,217,000	Campground, RV Park	$667,000
Restaurant, Bar	$20,802,000	Rental Cabin, Condo	$660,000
Groceries, Snacks	$4,962,000	Auto Rental	$497,000
Outfitter, Guide	$4,548,000	Gambling	$327,000
Retail Sales	$3,006,000	Misc. Services	$244,000
Lic., Entrance Fees	$2,978,000	Farmers Market	$65,000
Vehicle Repairs	$2,696,000	Transportation Fares	$12,000
		TOTAL	**$123,443,000**

2018 Contribution of Nonresident Traveler Expenditures in Silver Bow County

- 2018 average spending* in Silver Bow County by nonresident visitors to Montana totaled $123.4 million.
- This $123.4 million in local spending directly supports $84.9 million of economic activity in the region, and supports an additional $47.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $132.6 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$84,971,000	$21,512,000	$26,079,000	$132,562,000
Employment (# of jobs)	1,180	170	230	1,580
Employee Compensation	$26,675,000	$5,625,000	$7,101,000	$39,401,000
Proprietor Income	$9,914,000	$1,956,000	$1,912,000	$13,782,000
Other Property Type Income	$8,862,000	$2,716,000	$4,182,000	$15,760,000
State & Local Taxes^	–	–	–	$6,378,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Toole County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Toole County

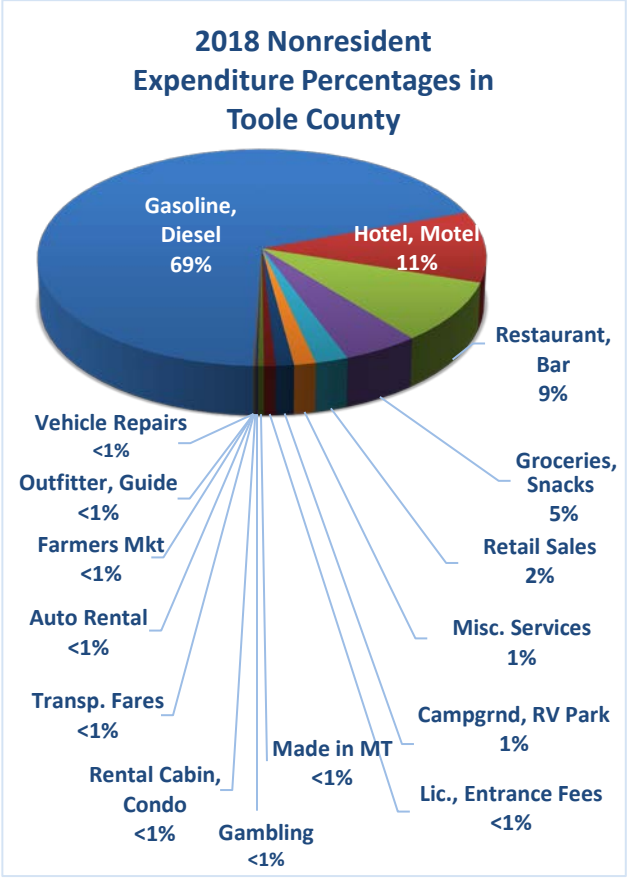

Table 1 - Total Nonresident Spending in Toole County*,◊

Gasoline, Diesel	$36,586,000	Made in MT	$209,000
Hotel, Motel	$5,634,000	Gambling	$70,000
Restaurant, Bar	$4,885,000	Rental Cabin, Condo	$50,000
Groceries, Snacks	$2,684,000	Transportation Fares	$38,000
Retail Sales	$1,155,000	Auto Rental	*Insufficient Sample Size*
Misc. Services	$769,000	Farmers Market	*Insufficient Sample Size*
Campground, RV Park	$647,000	Outfitter, Guide	*Insufficient Sample Size*
Lic., Entrance Fees	$403,000	Vehicle Repairs	*Insufficient Sample Size*
		TOTAL	**$53,130,000**

2018 Contribution of Nonresident Traveler Expenditures in Toole County

- 2018 average spending* in Toole County by nonresident visitors to Montana totaled $53.1 million.
- This $53.1 million in local spending directly supports $26.4 million of economic activity in the region, and supports an additional $8.5 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $34.9 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$26,432,000	$5,079,000	$3,392,000	$34,903,000
Employment (# of jobs)	330	40	30	400
Employee Compensation	$8,409,000	$1,123,000	$693,000	$10,225,000
Proprietor Income	$2,544,000	$255,000	$208,000	$3,007,000
Other Property Type Income	$2,020,000	$1,061,000	$789,000	$3,870,000
State & Local Taxes^	–	–	–	$1,937,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2018 $s) was used to help account for small and varying sample sizes at the county level.

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2018 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone County

by Kara Grau, M.S.

2018 Nonresident Traveler Expenditures in Yellowstone County

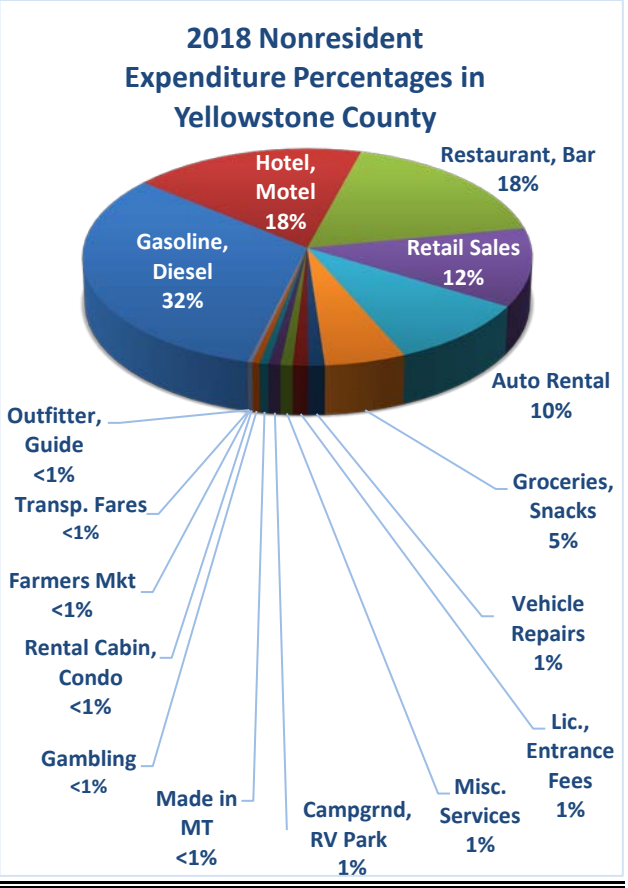

Table 1 - Total Nonresident Spending in Yellowstone County*,◊

Gasoline, Diesel	$86,832,000	Misc. Services	$2,169,000
Hotel, Motel	$49,086,000	Campground, RV Park	$2,159,000
Restaurant, Bar	$48,195,000	Made in MT	$1,586,000
Retail Sales	$31,592,000	Gambling	$1,287,000
Auto Rental	$26,232,000	Rental Cabin, Condo	$508,000
Groceries, Snacks	$14,615,000	Farmers Market	$162,000
Vehicle Repairs	$2,953,000	Transportation Fares	$67,000
Lic., Entrance Fees	$2,743,000	Outfitter, Guide	*Insufficient Sample Size*
		TOTAL	**$270,186,000**

2018 Contribution of Nonresident Traveler Expenditures in Yellowstone County

- 2018 average spending* in Yellowstone by nonresident visitors to Montana totaled $270.2 million.
- This $270.2 million in local spending directly supports $223.4 million of economic activity in the region, and supports an additional $137.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was $361.2 million.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	$223,423,000	$67,995,000	$69,807,000	$361,225,000
Employment (# of jobs)	2,310	450	540	3,300
Employee Compensation	$62,120,000	$17,970,000	$20,550,000	$100,640,000
Proprietor Income	$5,852,000	$3,084,000	$2,469,000	$11,405,000
Other Property Type Income	$40,249,000	$14,397,000	$13,811,000	$68,457,000
State & Local Taxes^	–	–	–	$15,633,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Ouput is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

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