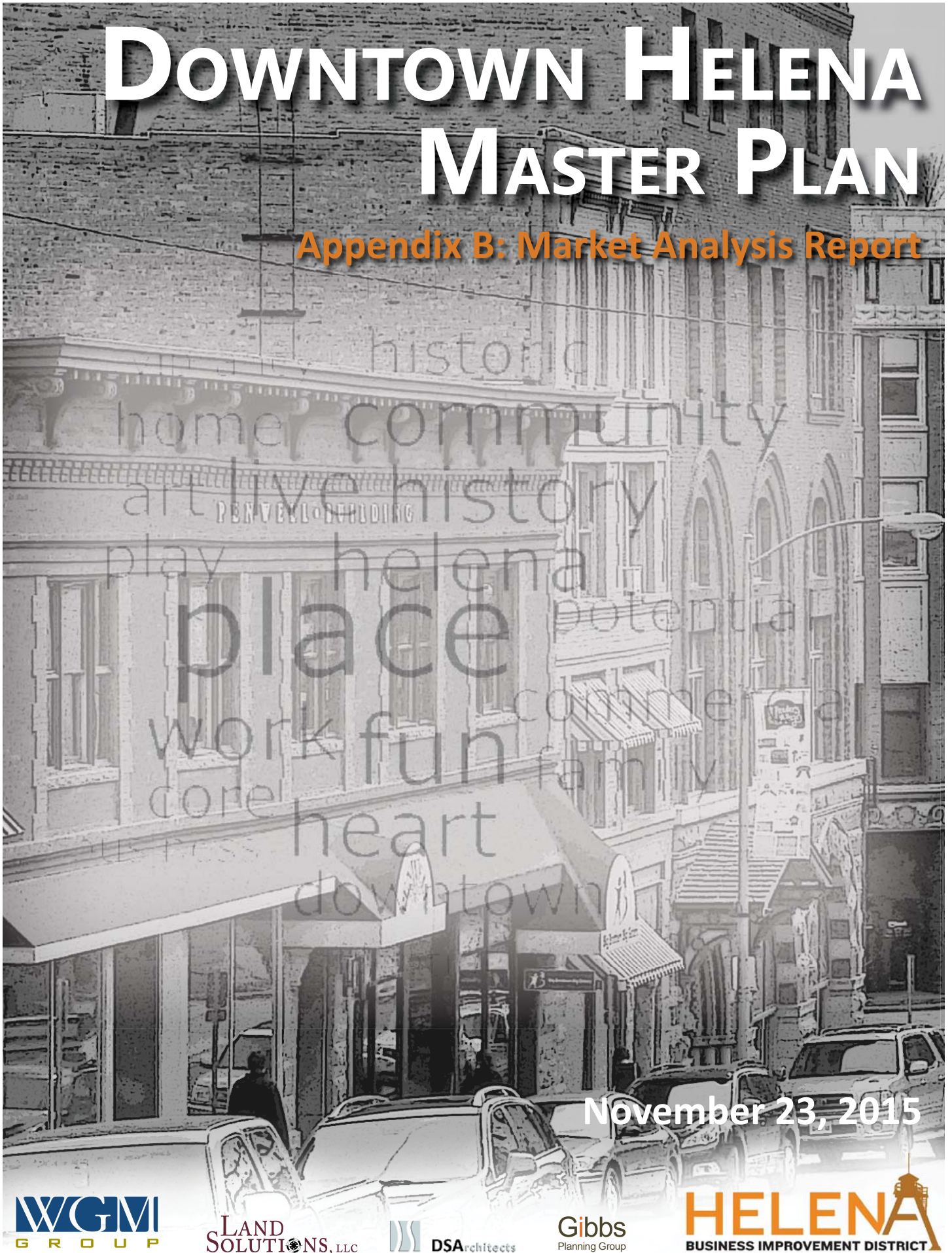


# DOWNTOWN HELENA MASTER PLAN

## Appendix B: Market Analysis Report



November 23, 2015



**Helena, Montana**  
**RETAIL MARKET STUDY**

Gibbs Planning Group, Inc.  
 17 September 2015, Rev. 28 September 2015, Rev. 23 November 2015



**Figure 1:** The Downtown Helena study area, shown above, can presently support an additional 142,900 sf of retail and restaurant development.

**Executive Summary**

This study finds that Downtown Helena has an existing demand for up to 142,900 square feet (sf) of new retail development producing up to \$41.4 million in sales. By 2020, this demand will likely generate up to \$46 million in gross sales. This new retail demand could be absorbed by existing businesses and/or with the opening of 45 to 60 new stores and restaurants.

Please find below a summary of the 2015 supportable retail:

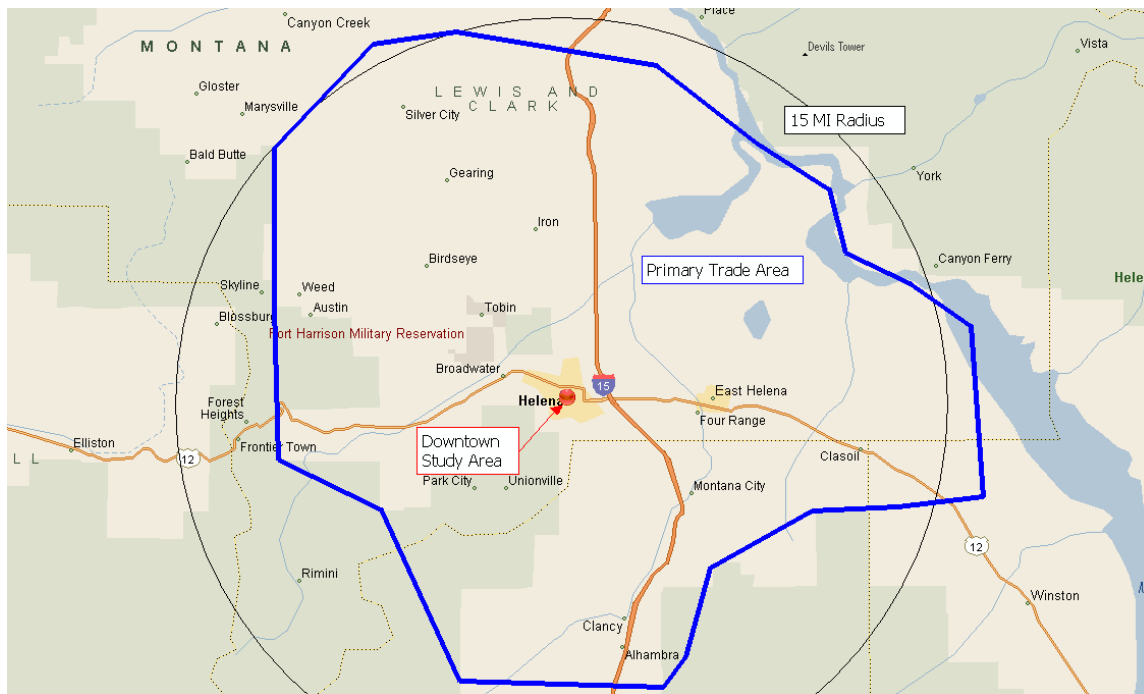
27,700	sf	Grocery Stores
22,200	sf	Limited Service Eating Places
18,000	sf	Full-Service Restaurants
17,300	sf	Apparel & Shoes
14,800	sf	General Merchandise Stores
8,700	sf	Special Food Services
7,400	sf	Miscellaneous Store Retailers
7,400	sf	Bars, Breweries & Pubs
4,900	sf	Office Supplies and Gift Stores
3,200	sf	Drinking Establishments & Specialty Food Stores
2,900	sf	Department Store Merchandise
2,500	sf	Book & Music Stores
1,900	sf	Jewelry Stores
1,400	sf	Florists
1,400	sf	Lawn and Garden Supply Stores
1,200	sf	Auto Parts Stores
<b>142,900</b>	<b>sf</b>	<b>Total</b>

If constructed as a new single-site center, the development would be classified as a community type shopping center by industry definitions and could include 7-8 apparel stores; 6-8 limited-service eating places; 5-6 general merchandise stores; 4-5 special food services; 3-4 office supplies and gift stores; 3-4 full service restaurants; 2-3 shoe stores; and an assortment of other retail and restaurant offerings.

The downtown has two shopping areas that will benefit from the symbiosis of additional retail and restaurant offerings. Located within the study site at its far northern edge is the 11-acre Great Northern Town Center, at 40 W. 14<sup>th</sup> Street. Built on land that was the former site of the depot for the Great Northern Railroad, the center is anchored by entertainment destinations such as ExplorationWorks museum of science and culture, a Cinemark Theater, a hotel/convention center and the centerpiece Great Northern Carousel, judged by the National Carousel Association as the finest new carousel in the United States. These attractions are traffic generators for the town center's retail, which includes A.L. Swanson Gallery, Boxwoods Fine Furniture and Cobblestone Clothiers, with restaurants such as Brewhouse Pub & Grill, Fusion Grille, Bad Betty's Barbeque and Silver Star Steak Co.

The pedestrian mall on Last Chance Gulch features locally owned specialty shops including apparel, boutique, gifts, sporting goods and art gallery stores, as well as eateries, coffee shops and additional entertainment venues.

### Trade Area Boundaries

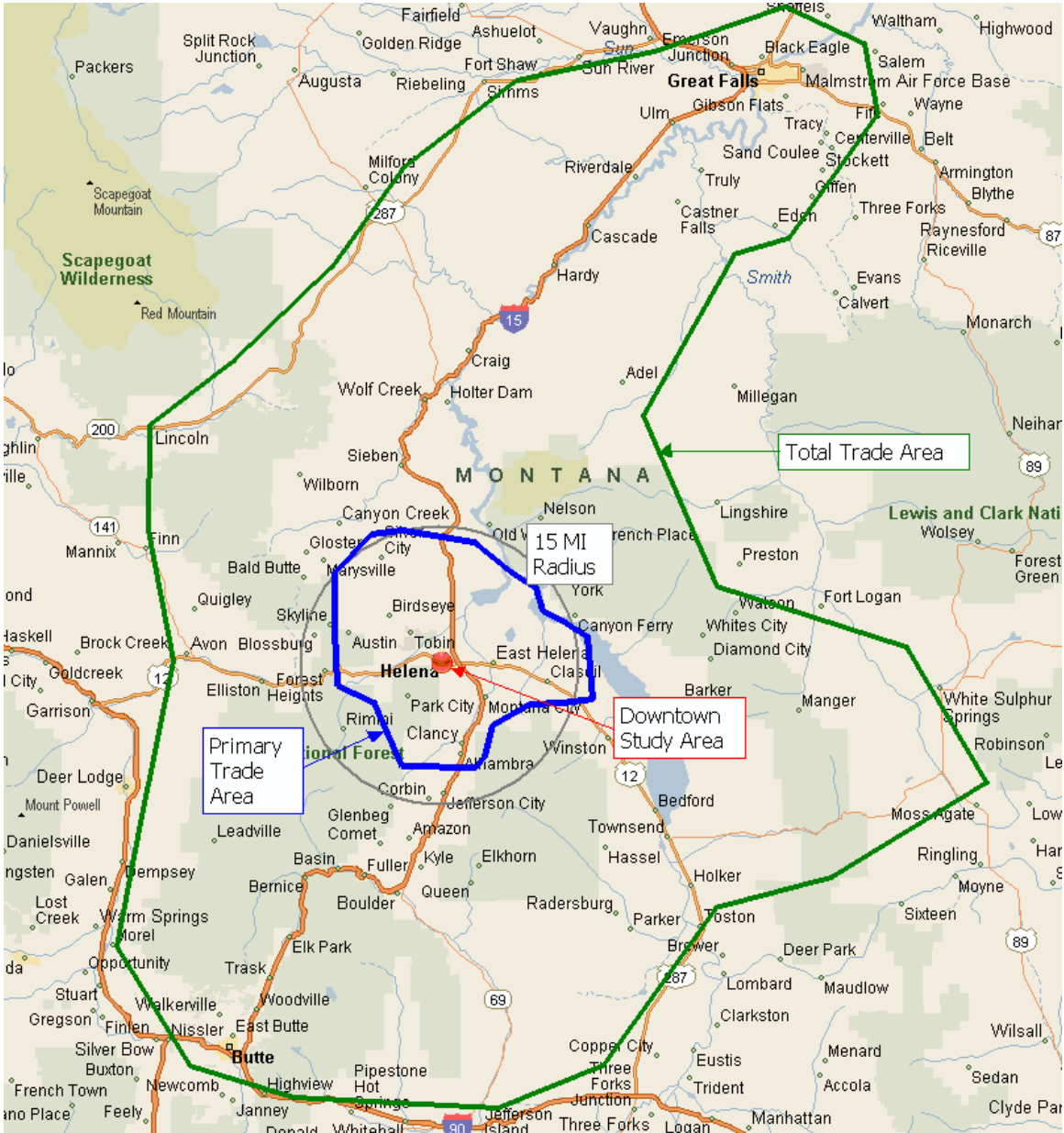


**Figure 2:** Downtown Helena has an approximate 482-square-mile primary trade area (shown above in blue).

This study estimates that the Helena primary trade area has an approximate 482-square-mile trade area, limited by Canyon Ferry Lake to the East, the edge of the Helena National Forest to the South and West, and the southern border of the town of Canyon Creek to the North. The boundaries roughly equate to a 15-mile radius or a 30-minute drive time. The total trade area reaches north to just outside of Great Falls: northwest down along US 287 and to the northeast

near Salem, Fife, Stockett and Giffen and then following Hound Creek; south along I-90 below Butte and into US 287 until Toston; and east to the towns of Moss Agate, White Sulphur Springs and Fort Logan, and along the east boundaries of the Helena National Forest. The boundaries stretch from the downtown 50 miles south to Butte and 80 miles north to Great Falls.

The total trade area is mapped in the following Figure 3:



**Figure 3:** The total trade area of the Helena downtown study area.

### Trade Area Demographics

The study site’s primary trade area includes 67,200 people, which is expected to increase at an annual rate of 0.85 percent to 70,100 by 2020. The current 2015 households number is 28,200, increasing slightly to 29,500 by 2020 at an annual rate of 0.95 percent. The primary trade area’s 2015 average household income is \$71,100 and is estimated to increase to \$81,100 by 2020.

Median household income in the primary trade area in 2015 is \$57,400 and estimated to increase to \$66,600 by 2020. Moreover, 36.8 percent of the households earn above \$75,000 per year. The average household size of 2.32 persons in 2015 is expected to remain nearly the same through 2020; the 2015 median age is 41.4 years old.

**Table 1: Trade Area Demographic Characteristics**

<i>Demographic Characteristic</i>	<i>Primary Trade Area</i>	<i>Total Trade Area</i>	<i>State of Montana</i>
2015 Population	<b>67,200</b>	188,400	1,027,700
2015 Households	<b>28,200</b>	80,500	430,600
2020 Population	<b>70,100</b>	193,800	1,073,200
2020 Households	<b>29,500</b>	83,200	452,100
2015-2020 Annual Population Growth Rate	<b>0.85%</b>	0.57%	0.87%
2015-2020 Annual HH Growth Rate	<b>0.95%</b>	0.67%	0.98%
2015 Average Household Income	<b>\$71,100</b>	\$61,300	\$62,300
2015 Median Household Income	<b>\$57,400</b>	\$47,000	\$46,700
2020 Average Household Income	<b>\$81,100</b>	\$69,900	\$71,000
2020 Median Household Income	<b>\$66,600</b>	\$54,300	\$53,900
% Households w. incomes \$75,000 or higher	<b>36.8%</b>	28.3%	28.3%
% Bachelor's Degree	<b>24.5%</b>	19.2%	19.7%
% Graduate or Professional Degree	<b>14.5%</b>	10.3%	9.5%
Average Household Size	<b>2.32</b>	2.27	2.32
Median Age	<b>41.4</b>	41.0	40.6

**Table 1:** Key demographic characteristics of the study area's primary and total trade areas, and the State of Montana.

In comparison, the total trade area includes 188,400 people and 80,500 households. The former's growth is expected to increase at an annual rate of 0.57percent, and the latter is projected to increase at an annual rate of 0.67 percent to 2020, when the city's projected population will be 193,800 with 83,200 households. Incomes for the total trade area are lower than the primary trade area, with an average household income of \$61,300 in 2015 that is estimated to grow to \$66,900 by 2020. The median household income in 2015 is \$47,000, and estimated to grow in five years to \$54,300. Slightly more than 28 percent of the city's population earned more than \$75,000 annually in 2015. Average household size is 2.27 persons, projected to remain roughly the same at 2.26 through 2020; the 2015 median age is similar to the primary trade area at 41.0 years old.

The state demographics are quite similar to the total trade area figures, with the notable exception of the population and household growth rates, which are higher than the total trade area. Rather, the state growth rates are close to the primary trade area statistics.

It is interesting to note the difference in some demographics between the City of Helena and another large city, Missoula (not trade areas). Helena can boast average and median incomes that are 25 and 33 percent higher, respectively, than Missoula, with less than half of Missoula's

population. Missoula’s population is also younger at 32.1, as compared to Helena at 41.3 years, but both cities’ residents have a similarly educated 26 percent having earned bachelor’s degrees. Helena’s income stats are also healthier than the City of Bozeman, whose population is 27 percent higher than Helena’s, but posts average household incomes that are seven percent less and median household incomes that are 14 percent less than the City of Helena.

**Table 2: Cities Demographic Comparison**

<i>Demographic Characteristic</i>	<i>City of Helena</i>	<i>City Of Missoula</i>	<i>City of Bozeman</i>
2015 Population	<b>29,300</b>	69,400	40,400
2015 Households	<b>13,500</b>	30,600	17,400
2020 Population	<b>30,300</b>	72,100	44,000
2020 Households	<b>14,000</b>	32,000	19,200
2015-2020 Annual Population Growth Rate	<b>0.67%</b>	0.78%	1.70%
2015-2020 Annual HH Growth Rate	<b>0.80%</b>	0.90%	1.94%
2015 Average Household Income	<b>\$67,100</b>	\$53,600	\$62,600
2015 Median Household Income	<b>\$52,300</b>	\$39,100	\$45,900
2020 Average Household Income	<b>\$76,200</b>	\$61,100	\$70,900
2020 Median Household Income	<b>\$59,100</b>	\$46,900	\$53,800
% Households w. incomes \$75,000 or higher	<b>32.5%</b>	23.2%	28.5%
% Bachelor’s Degree	<b>26.3%</b>	26.6%	33.3%
% Graduate or Professional Degree	<b>20.5%</b>	16.5%	18.4%
Average Household Size	<b>2.05</b>	2.16	2.15
Median Age	<b>41.3</b>	32.1	29.0

**Table 2:** Comparison of the demographics of the City of Helena to the City of Missoula and the City of Bozeman.

## Tourism



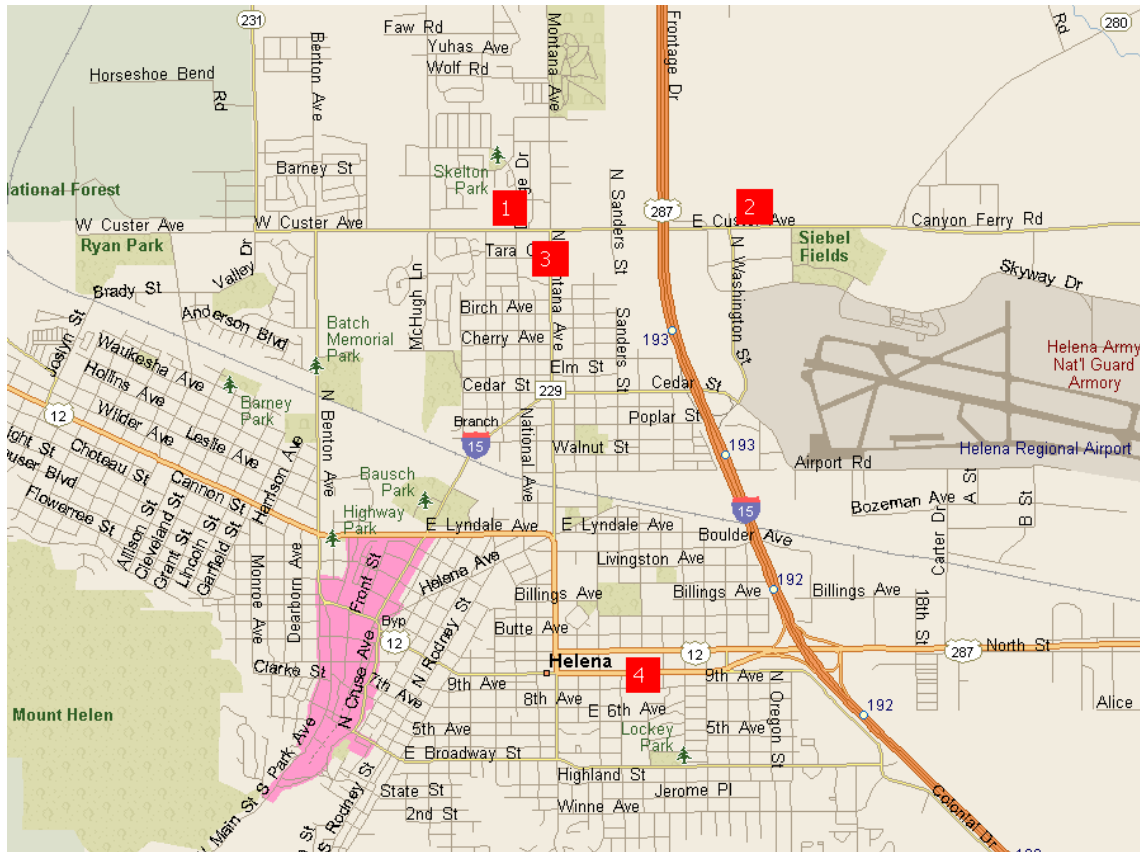
**Figure 3:** Surrounded by natural beauty, Helena, the state capitol, is a major tourist destination for outdoor enthusiasts.

Non-resident visitors play a major role in supporting retail and restaurants in downtown Helena. As the capitol city, Helena is one of the major hubs in the state, located between Yellowstone and Glacier National Parks. According to a 2015 study by the University of Montana Institute for Tourism and Recreation Research, non-resident visitors to Lewis and Clark County, of which Helena is the seat, spent \$117 million in the local economy. Of the total non-resident spending, \$51 million was spent on retail (\$16.25 million), restaurants (\$23.01 million) and grocery (\$11.74

million) purchases. Assuming sales per sf estimates from this study, tourists support up to 180,000 sf of retail in Lewis and Clark County.

### Other Shopping Areas

As part of GPG’s evaluation, shopping centers near the site were identified to assess their retail appeal, strength of tenant mix, general maintenance and accessibility.



**Figure 4:** Locations of retail centers 1 through 4 in Helena. The locations of retail centers 5 and 6 in Great Falls, 70 miles north of Helena, are not shown.

**Table 3: Shopping Center Competition**

<i>Map Designation</i>	<i>Retail Center Name</i>	<i>Shopping Center Type</i>	<i>Distance to Study Site</i>
1.	Northside Center	Regional Center	2.0 miles
2.	Skyway Shopping Center	Regional Center	2.4 miles
3.	Northgate Plaza Shopping Center	Neighborhood Center	1.9 miles
4.	Capital Hill Mall	Community Center	1.25 miles
5.	Great Falls Marketplace	Regional Center	70 miles
6.	Holiday Village Mall	Regional Center	71.3 miles

**Table 3:** The locations of retail centers 1 through 4 are designated in the map in Figure 4, above.



*Figure 5: The Northside Center Macy's anchors a popular shopping destination along Custer and Montana.*

**1. Northside Center**

Northside Center is the retail “Main & Main” of Helena, located two miles from the center of downtown at Custer & North Montana Avenues. This predominant shopping destination for the trade area is a regional power center featuring a rare stand-alone Macy's, which, with Target, heads a roster of retail attractions including Albertson's, Famous Footwear, Hastings, Lowe's, PetSmart, Ross Dress for Less and Shopko.



*Figure 6: Skyway Shopping Center has excellent visibility from Interstate 15.*

**2. Skyway Regional Shopping Center**

Developed by Wadsworth Development Group and now owned by Ball Ventures, Skyway Shopping Center is a 420,000 GLA regional shopping center located at Custer Avenue & Washington Street, with excellent visibility from I-15. Less than 2.5 miles from the center of downtown, it is anchored by Costco & Home Depot. Co-tenants are Bed Bath & Beyond, Christopher Banks/C.J. Banks, Hobby Lobby, Jensen Jewelers, Maurices, Rue 21, Shoe Carnival, Staples, TJ Maxx and Ulta, with restaurants Chili's Macaroni Grill, Hardee's and IHOP.





*Figure 7: CVS is an anchor of Northgate Plaza Shopping Center (left). Capital Hill Mall (right) is a failing shopping area near the state capitol.*

**3. Northgate Plaza Shopping Center**

Located almost two miles from downtown on the southeast corner of Montana Avenue and Custer, Northgate Plaza is a neighborhood center built in 1977. Retail offerings include CVS, Dollar Tree, Harbor Freight, Natural Grocers and Power Townsend Hardware/Lumber. This 34,800 sf center sits on one of the highest trafficked intersections in Helena. Lowes and Sportsman Warehouse are nearby.

**4. Capital Hill Mall**

Capital Hill Mall is located three blocks from the state capital building and 1.25 miles from the center of downtown. JC Penney is the only store of note to remain at this depressed mall. Owned by City National Bank and for sale for over a year, it was once the largest shopping center in Helena.



*Figure 8: Shopping at Great Falls Marketplace (left) and Holiday Village Mall may be worth the drive for Helena*

**5. Great Falls Marketplace**

Great Falls Marketplace is a 215,000 sf regional center located 70 miles north of Downtown Helena on the primary retail artery into Great Falls. Opened in 1997, it is easily accessible for intrepid shoppers who can hop onto I-15 and take the interstate all the way to Great Falls from Helena. It is anchored by Barnes & Noble, Home Depot and Office Max. At 97 percent occupancy, its other retail tenants include Denver Mattress, Famous

Footwear, Michael's, Old Navy, Petco, Pier 1 Imports and Smith's. A Carmike Cinemas 12-screen Movie Theater, Golden Corral and Quiznos round out the center's offerings.

#### 6. Holiday Village Mall

Built in 1957 and now owned by GK Development, Holiday Village Mall is a 577,000 sf regional center 1.5 miles northeast of Great Falls Marketplace in Great Falls. Anchored by Herberger's, JC Penney and Scheels All Sports, it also offers more than 60 stores, restaurants and service providers. These include Bath & Body Works, Buckle, Champs, CJ Banks/ Christopher & Banks, Famous Footwear, Hot Topic, Jensen Jewelers, Maurices, Kay Jewelers, Victoria's Secret and Zumiez, as well as big box stores Bed, Bath & Beyond, Big Lots and Ross Dress for Less.

**Table 2: 2015 & 2020 Supportable Retail Table**

Retail Category	2015 Estimated Retail Sales	2015 Sales/ SF	2015 Estimated Supportable SF	2020 Estimated Retail Sales	2020 Sales/ SF	2020 Estimated Supportable SF	No. of Stores
<b>Retailers</b>							
Apparel Stores	\$3,588,952	\$255	14,070	\$3,921,510	\$265	14,800	7 - 8
Auto Parts Stores	\$237,855	\$205	1,160	\$268,035	\$215	1,250	1
Beer, Wine & Liquor Stores	\$282,017	\$295	960	\$344,328	\$310	1,110	1
Book & Music Stores	\$528,764	\$210	2,520	\$571,212	\$220	2,600	1
Department Store Merchandise	\$870,384	\$300	2,900	\$1,101,227	\$315	3,500	1 - 2
Electronics & Appliance Stores	\$114,300	\$285	400	\$189,463	\$300	630	1
Florists	\$290,657	\$205	1,420	\$312,012	\$215	1,450	1
General Merchandise Stores	\$4,061,527	\$275	14,770	\$4,677,869	\$290	16,130	5 - 6
Grocery Stores	\$8,441,755	\$305	27,680	\$9,720,776	\$320	30,380	1 - 2
Jewelry Stores	\$619,854	\$325	1,910	\$685,580	\$340	2,020	1 - 2
Lawn & Garden Supply Stores	\$280,773	\$205	1,370	\$304,211	\$215	1,410	1
Miscellaneous Store Retailers	\$1,751,841	\$250	7,010	\$1,896,222	\$265	7,160	3 - 5
Office Supplies & Gift Stores	\$1,203,938	\$245	4,910	\$1,301,185	\$260	5,000	3 - 4
Shoe Stores	\$842,217	\$265	3,180	\$904,566	\$280	3,230	2 - 3
Specialty Food Stores	\$548,201	\$250	2,190	\$587,912	\$260	2,260	1 - 2
<b>Retailer Totals</b>	<b>\$23,663,036</b>	<b>\$258</b>	<b>86,450</b>	<b>\$26,786,108</b>	<b>\$271</b>	<b>92,930</b>	<b>30 - 40</b>
<b>Restaurants</b>							
Bars, Breweries & Pubs	\$2,267,459	\$305	7,430	\$2,440,395	\$320	7,630	2 - 3
Full-Service Restaurants	\$5,863,575	\$325	18,040	\$6,405,163	\$340	18,840	3 - 4
Limited-Service Eating Places	\$7,001,096	\$315	22,230	\$7,634,918	\$330	23,140	6 - 8
Special Food Services	\$2,568,338	\$295	8,710	\$2,746,810	\$310	8,860	4 - 5
<b>Restaurant Totals</b>	<b>\$17,700,469</b>	<b>\$310</b>	<b>56,410</b>	<b>\$19,227,286</b>	<b>\$325</b>	<b>58,470</b>	<b>15 - 20</b>
<b>Retailer &amp; Restaurant Totals</b>	<b>\$41,363,505</b>	<b>\$269</b>	<b>142,860</b>	<b>\$46,013,394</b>	<b>\$283</b>	<b>151,400</b>	<b>45 - 60</b>

*Table 2: The study site's primary trade area has demand for roughly 142,900 sf of new retail and restaurants.*

#### Methodology

GPG defined a trade area that would serve the retail in the study area based on geographic and topographic considerations, traffic access/flow in the area, relative retail strengths and

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weaknesses of the competition, concentrations of daytime employment and the retail gravitation in the market, as well as our experience defining trade areas for similar markets. Population, consumer expenditure and demographic characteristics of trade area residents were collected using census tracts from the U.S. Bureau of the Census, U.S. Bureau of Labor Statistics and Esri (Environmental Systems Research Institute).

Finally, based on the projected consumer expenditure capture (demand) in the primary trade area of the gross consumer expenditure by retail category, less the current existing retail sales (supply) by retail category, GPG projects the potential net consumer expenditure (gap) available to support existing and new development. The projected net consumer expenditure capture is based on household expenditure and demographic characteristics of the primary trade area, existing and planned retail competition, traffic and retail gravitational patterns and GPG's qualitative assessment of the downtown Helena study area.

Net potential captured consumer expenditure (gap) is equated to potential retail development square footage, with the help of retail sales per square foot data provided by Dollars and Cents of Shopping Centers (Urban Land Institute and International Council of Shopping Centers), qualitatively adjusted to fit the urbanism and demographics of the study area.

### **Assumptions**

The projections of this study are based on the following assumptions:

- No other major retail centers are planned or proposed at this time and, as such, no other retail is assumed in our sales forecasts.
- No other major retail will be developed within the trade area of the subject site.
- The region's economy will stabilize at normal or above normal ranges of employment, inflation, retail demand and growth.
- The new retail development will be planned, designed, built, leased and managed as a walkable town center, to the best shopping center industry practices of the American Planning Association, Congress for New Urbanism, the International Council of Shopping Centers and Urban Land Institute.
- Parking for the area is assumed adequate for the proposed uses, with easy access to the retailers in the development.
- Visibility of the shopping center or retail is assumed to meet industry standards, with signage as required to assure good visibility of the retailers.

### **Limits of Study**

The findings of this study represent GPG's best estimates for the amounts and types of retail tenants that should be supportable in the Downtown Helena study area's primary trade area by 2020. Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and are believed to be reliable. It should be noted that the findings of this study are based upon generally accepted market research and business standards. It is possible that the study site's surrounding area could support lower or higher quantities of retailers and restaurants yielding lower or higher sales revenues than indicated by this study, depending on numerous factors including respective business practices and the management and design of the study area.

This study is based on estimates, assumptions and other information developed by GPG as an independent third party research effort with general knowledge of the retail industry, and consultations with the client and its representatives. This report is based on information that was

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current as of September 28, 2015, and GPG has not undertaken any update of its research effort since such date.

This report may contain prospective financial information, estimates, or opinions that represent GPG's view of reasonable expectations at a particular time. Such information, estimates, or opinions are not offered as predictions or assurances that a particular level of income or profit will be achieved, that particular events will occur, or that a particular price will be offered or accepted. Actual results achieved during the period covered by our market analysis may vary from those described in our report, and the variations may be material. Therefore, no warranty or representation is made by GPG that any of the projected values or results contained in this study will be achieved.

This study *should not* be the sole basis for designing, financing, planning, and programming any business, real estate development, or public planning policy. This study is intended only for the use of the client and is void for other site locations, developers, or organizations.

- *End of Study* -



## Appendix EXHIBIT A1: Community Profile

### Community Profile

Gibbs Planning Group

Helena Primary Trade Area  
Area: 482.15 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.61757733  
Longitude: -112.017990

<b>Population Summary</b>	
2000 Total Population	55,720
2010 Total Population	64,276
2015 Total Population	67,192
2015 Group Quarters	1,824
2020 Total Population	70,080
2015-2020 Annual Rate	0.85%
<b>Household Summary</b>	
2000 Households	22,505
2000 Average Household Size	2.42
2010 Households	26,587
2010 Average Household Size	2.35
2015 Households	28,186
2015 Average Household Size	2.32
2020 Households	29,548
2020 Average Household Size	2.31
2015-2020 Annual Rate	0.95%
2010 Families	16,926
2010 Average Family Size	2.91
2015 Families	17,781
2015 Average Family Size	2.88
2020 Families	18,539
2020 Average Family Size	2.87
2015-2020 Annual Rate	0.84%
<b>Housing Unit Summary</b>	
2000 Housing Units	23,702
Owner Occupied Housing Units	67.1%
Renter Occupied Housing Units	27.8%
Vacant Housing Units	5.0%
2010 Housing Units	28,046
Owner Occupied Housing Units	66.4%
Renter Occupied Housing Units	28.4%
Vacant Housing Units	5.2%
2015 Housing Units	29,733
Owner Occupied Housing Units	63.8%
Renter Occupied Housing Units	31.0%
Vacant Housing Units	5.2%
2020 Housing Units	31,202
Owner Occupied Housing Units	63.8%
Renter Occupied Housing Units	30.9%
Vacant Housing Units	5.3%
<b>Median Household Income</b>	
2015	\$57,444
2020	\$66,647
<b>Median Home Value</b>	
2015	\$221,005
2020	\$249,593
<b>Per Capita Income</b>	
2015	\$30,036
2020	\$34,433
<b>Median Age</b>	
2010	40.5
2015	41.4
2020	41.7

**Data Note:** Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Appendix EXHIBIT A2: Community Profile

### Community Profile

Gibbs Planning Group

Helena Primary Trade Area  
Area: 482.15 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.61757733  
Longitude: -112.017990

2015 Households by Income	
Household Income Base	28,186
<\$15,000	10.9%
\$15,000 - \$24,999	9.6%
\$25,000 - \$34,999	9.8%
\$35,000 - \$49,999	11.1%
\$50,000 - \$74,999	21.8%
\$75,000 - \$99,999	15.1%
\$100,000 - \$149,999	15.1%
\$150,000 - \$199,999	3.5%
\$200,000+	3.1%
Average Household Income	\$71,126
2020 Households by Income	
Household Income Base	29,548
<\$15,000	9.8%
\$15,000 - \$24,999	7.4%
\$25,000 - \$34,999	8.4%
\$35,000 - \$49,999	9.7%
\$50,000 - \$74,999	19.8%
\$75,000 - \$99,999	18.3%
\$100,000 - \$149,999	18.0%
\$150,000 - \$199,999	5.1%
\$200,000+	3.6%
Average Household Income	\$81,146
2015 Owner Occupied Housing Units by Value	
Total	18,973
<\$50,000	3.0%
\$50,000 - \$99,999	6.3%
\$100,000 - \$149,999	13.8%
\$150,000 - \$199,999	19.6%
\$200,000 - \$249,999	17.3%
\$250,000 - \$299,999	12.7%
\$300,000 - \$399,999	14.0%
\$400,000 - \$499,999	6.4%
\$500,000 - \$749,999	4.8%
\$750,000 - \$999,999	0.9%
\$1,000,000 +	1.2%
Average Home Value	\$261,078
2020 Owner Occupied Housing Units by Value	
Total	19,892
<\$50,000	1.8%
\$50,000 - \$99,999	4.7%
\$100,000 - \$149,999	10.7%
\$150,000 - \$199,999	15.3%
\$200,000 - \$249,999	17.6%
\$250,000 - \$299,999	14.7%
\$300,000 - \$399,999	14.8%
\$400,000 - \$499,999	9.5%
\$500,000 - \$749,999	7.0%
\$750,000 - \$999,999	2.3%
\$1,000,000 +	1.7%
Average Home Value	\$303,035

**Data Note:** Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Appendix EXHIBIT A3: Community Profile

### Community Profile

Gibbs Planning Group

Helena Primary Trade Area  
Area: 482.15 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.61757733  
Longitude: -112.017990

2010 Population by Age		
Total		64,273
0 - 4		6.3%
5 - 9		6.5%
10 - 14		6.5%
15 - 24		12.6%
25 - 34		11.8%
35 - 44		11.9%
45 - 54		16.2%
55 - 64		15.0%
65 - 74		7.4%
75 - 84		3.8%
85 +		1.9%
18 +		76.8%
2015 Population by Age		
Total		67,192
0 - 4		5.9%
5 - 9		6.2%
10 - 14		6.5%
15 - 24		12.6%
25 - 34		11.6%
35 - 44		11.4%
45 - 54		13.8%
55 - 64		16.0%
65 - 74		9.9%
75 - 84		4.0%
85 +		2.1%
18 +		77.8%
2020 Population by Age		
Total		70,080
0 - 4		5.8%
5 - 9		5.9%
10 - 14		6.5%
15 - 24		12.2%
25 - 34		11.6%
35 - 44		11.8%
45 - 54		12.0%
55 - 64		14.8%
65 - 74		12.1%
75 - 84		5.0%
85 +		2.2%
18 +		78.2%
2010 Population by Sex		
Males		31,688
Females		32,588
2015 Population by Sex		
Males		33,135
Females		34,058
2020 Population by Sex		
Males		34,553
Females		35,527

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.



## Appendix EXHIBIT A4: Community Profile

### Community Profile

Gibbs Planning Group

Helena Primary Trade Area  
Area: 482.15 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.61757733  
Longitude: -112.017990

2010 Population by Race/Ethnicity	
Total	64,276
White Alone	94.1%
Black Alone	0.3%
American Indian Alone	2.0%
Asian Alone	0.6%
Pacific Islander Alone	0.1%
Some Other Race Alone	0.5%
Two or More Races	2.4%
Hispanic Origin	2.5%
Diversity Index	15.7
2015 Population by Race/Ethnicity	
Total	67,194
White Alone	92.8%
Black Alone	0.9%
American Indian Alone	2.1%
Asian Alone	0.8%
Pacific Islander Alone	0.1%
Some Other Race Alone	0.6%
Two or More Races	2.8%
Hispanic Origin	3.0%
Diversity Index	18.9
2020 Population by Race/Ethnicity	
Total	70,081
White Alone	91.4%
Black Alone	1.4%
American Indian Alone	2.2%
Asian Alone	0.9%
Pacific Islander Alone	0.1%
Some Other Race Alone	0.7%
Two or More Races	3.2%
Hispanic Origin	3.7%
Diversity Index	22.3
2010 Population by Relationship and Household Type	
Total	64,276
In Households	97.2%
In Family Households	78.6%
Householder	26.5%
Spouse	20.9%
Child	27.5%
Other relative	1.8%
Nonrelative	2.0%
In Nonfamily Households	18.5%
In Group Quarters	2.8%
Institutionalized Population	0.8%
Noninstitutionalized Population	2.0%

**Data Note:** Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Appendix EXHIBIT A5: Community Profile

Gibbs Planning Group

### Community Profile

Helena Primary Trade Area  
Area: 482.15 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.61757733  
Longitude: -112.017990

<b>2015 Population 25+ by Educational Attainment</b>	
Total	46,261
Less than 9th Grade	1.3%
9th - 12th Grade, No Diploma	3.1%
High School Graduate	18.0%
GED/Alternative Credential	3.5%
Some College, No Degree	25.6%
Associate Degree	9.5%
Bachelor's Degree	24.5%
Graduate/Professional Degree	14.5%
<b>2015 Population 15+ by Marital Status</b>	
Total	54,736
Never Married	26.7%
Married	53.2%
Widowed	5.6%
Divorced	14.4%
<b>2015 Civilian Population 16+ in Labor Force</b>	
Civilian Employed	95.1%
Civilian Unemployed	4.9%
<b>2015 Employed Population 16+ by Industry</b>	
Total	35,396
Agriculture/Mining	2.3%
Construction	5.4%
Manufacturing	2.5%
Wholesale Trade	1.6%
Retail Trade	9.7%
Transportation/Utilities	3.8%
Information	0.8%
Finance/Insurance/Real Estate	7.7%
Services	43.8%
Public Administration	22.4%
<b>2015 Employed Population 16+ by Occupation</b>	
Total	35,398
White Collar	71.1%
Management/Business/Financial	19.3%
Professional	27.4%
Sales	8.9%
Administrative Support	15.5%
Services	15.5%
Blue Collar	13.4%
Farming/Forestry/Fishing	0.3%
Construction/Extraction	4.1%
Installation/Maintenance/Repair	2.3%
Production	2.5%
Transportation/Material Moving	4.2%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Appendix EXHIBIT A6: Community Profile

Gibbs Planning Group

### Community Profile

Helena Primary Trade Area  
Area: 482.15 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.61757733  
Longitude: -112.017990

2010 Households by Type	
Total	26,588
Households with 1 Person	29.8%
Households with 2+ People	70.2%
Family Households	63.7%
Husband-wife Families	50.2%
With Related Children	19.8%
Other Family (No Spouse Present)	13.5%
Other Family with Male Householder	4.2%
With Related Children	2.9%
Other Family with Female Householder	9.3%
With Related Children	6.6%
Nonfamily Households	6.6%
All Households with Children	29.8%
Multigenerational Households	2.1%
Unmarried Partner Households	6.1%
Male-female	5.5%
Same-sex	0.6%
2010 Households by Size	
Total	26,589
1 Person Household	29.7%
2 Person Household	37.0%
3 Person Household	13.9%
4 Person Household	12.0%
5 Person Household	4.8%
6 Person Household	1.7%
7 + Person Household	0.8%
2010 Households by Tenure and Mortgage Status	
Total	26,586
Owner Occupied	70.1%
Owned with a Mortgage/Loan	49.2%
Owned Free and Clear	20.8%
Renter Occupied	29.9%

**Data Note:** Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Appendix EXHIBIT A7: Community Profile - Total Trade Area

### Community Profile

Gibbs Planning Group

Helena Total Trade area  
Area: 6,665.77 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.67400198  
Longitude: -111.896497

<b>Population Summary</b>	
2000 Total Population	173,021
2010 Total Population	183,120
2015 Total Population	188,404
2015 Group Quarters	5,404
2020 Total Population	193,841
2015-2020 Annual Rate	0.57%
<b>Household Summary</b>	
2000 Households	70,771
2000 Average Household Size	2.38
2010 Households	77,136
2010 Average Household Size	2.30
2015 Households	80,498
2015 Average Household Size	2.27
2020 Households	83,231
2020 Average Household Size	2.26
2015-2020 Annual Rate	0.67%
2010 Families	47,940
2010 Average Family Size	2.89
2015 Families	49,552
2015 Average Family Size	2.85
2020 Families	50,952
2020 Average Family Size	2.84
2015-2020 Annual Rate	0.56%
<b>Housing Unit Summary</b>	
2000 Housing Units	77,681
Owner Occupied Housing Units	61.9%
Renter Occupied Housing Units	29.2%
Vacant Housing Units	8.9%
2010 Housing Units	85,501
Owner Occupied Housing Units	61.1%
Renter Occupied Housing Units	29.1%
Vacant Housing Units	9.8%
2015 Housing Units	89,199
Owner Occupied Housing Units	58.4%
Renter Occupied Housing Units	31.8%
Vacant Housing Units	9.8%
2020 Housing Units	92,452
Owner Occupied Housing Units	58.3%
Renter Occupied Housing Units	31.7%
Vacant Housing Units	10.0%
<b>Median Household Income</b>	
2015	\$47,014
2020	\$54,281
<b>Median Home Value</b>	
2015	\$195,733
2020	\$232,546
<b>Per Capita Income</b>	
2015	\$26,240
2020	\$30,077
<b>Median Age</b>	
2010	40.2
2015	41.0
2020	41.5

**Data Note:** Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Appendix EXHIBIT A8: Community Profile - Total Trade Area

Gibbs Planning Group

### Community Profile

Helena Total Trade area  
Area: 6,665.77 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.67400198  
Longitude: -111.896497

2015 Households by Income	
Household Income Base	80,498
<\$15,000	14.1%
\$15,000 - \$24,999	12.8%
\$25,000 - \$34,999	11.5%
\$35,000 - \$49,999	13.7%
\$50,000 - \$74,999	19.5%
\$75,000 - \$99,999	11.7%
\$100,000 - \$149,999	11.4%
\$150,000 - \$199,999	2.9%
\$200,000+	2.3%
Average Household Income	\$61,258
2020 Households by Income	
Household Income Base	83,231
<\$15,000	13.2%
\$15,000 - \$24,999	9.7%
\$25,000 - \$34,999	10.7%
\$35,000 - \$49,999	12.4%
\$50,000 - \$74,999	19.3%
\$75,000 - \$99,999	15.4%
\$100,000 - \$149,999	13.4%
\$150,000 - \$199,999	3.8%
\$200,000+	2.7%
Average Household Income	\$69,893
2015 Owner Occupied Housing Units by Value	
Total	52,119
<\$50,000	4.1%
\$50,000 - \$99,999	9.9%
\$100,000 - \$149,999	17.6%
\$150,000 - \$199,999	20.1%
\$200,000 - \$249,999	15.5%
\$250,000 - \$299,999	10.6%
\$300,000 - \$399,999	11.3%
\$400,000 - \$499,999	5.1%
\$500,000 - \$749,999	4.0%
\$750,000 - \$999,999	0.8%
\$1,000,000 +	1.1%
Average Home Value	\$237,264
2020 Owner Occupied Housing Units by Value	
Total	53,915
<\$50,000	2.5%
\$50,000 - \$99,999	7.5%
\$100,000 - \$149,999	12.7%
\$150,000 - \$199,999	16.6%
\$200,000 - \$249,999	16.5%
\$250,000 - \$299,999	12.8%
\$300,000 - \$399,999	13.0%
\$400,000 - \$499,999	8.6%
\$500,000 - \$749,999	6.2%
\$750,000 - \$999,999	2.2%
\$1,000,000 +	1.5%
Average Home Value	\$283,924

**Data Note:** Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Appendix EXHIBIT A9: Community Profile - Total Trade Area

Gibbs Planning Group

### Community Profile

Helena Total Trade area  
Area: 6,665.77 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.67400198  
Longitude: -111.896497

2010 Population by Age	
Total	183,120
0 - 4	6.4%
5 - 9	6.1%
10 - 14	6.1%
15 - 24	13.6%
25 - 34	12.1%
35 - 44	11.4%
45 - 54	15.5%
55 - 64	13.8%
65 - 74	8.1%
75 - 84	4.7%
85 +	2.2%
18 +	77.5%
2015 Population by Age	
Total	188,404
0 - 4	6.0%
5 - 9	6.0%
10 - 14	6.0%
15 - 24	13.0%
25 - 34	12.5%
35 - 44	10.9%
45 - 54	13.4%
55 - 64	14.9%
65 - 74	9.9%
75 - 84	4.9%
85 +	2.4%
18 +	78.5%
2020 Population by Age	
Total	193,841
0 - 4	5.9%
5 - 9	5.7%
10 - 14	6.1%
15 - 24	12.3%
25 - 34	12.4%
35 - 44	11.4%
45 - 54	11.7%
55 - 64	14.5%
65 - 74	11.7%
75 - 84	5.7%
85 +	2.5%
18 +	78.8%
2010 Population by Sex	
Males	91,189
Females	91,931
2015 Population by Sex	
Males	93,911
Females	94,493
2020 Population by Sex	
Males	96,660
Females	97,181

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Appendix EXHIBIT A10: Community Profile - Total Trade Area

### Community Profile

Gibbs Planning Group

Helena Total Trade area  
Area: 6,665.77 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.67400198  
Longitude: -111.896497

2010 Population by Age	
Total	183,120
0 - 4	6.4%
5 - 9	6.1%
10 - 14	6.1%
15 - 24	13.6%
25 - 34	12.1%
35 - 44	11.4%
45 - 54	15.5%
55 - 64	13.8%
65 - 74	8.1%
75 - 84	4.7%
85 +	2.2%
18 +	77.5%
2015 Population by Age	
Total	188,404
0 - 4	6.0%
5 - 9	6.0%
10 - 14	6.0%
15 - 24	13.0%
25 - 34	12.5%
35 - 44	10.9%
45 - 54	13.4%
55 - 64	14.9%
65 - 74	9.9%
75 - 84	4.9%
85 +	2.4%
18 +	78.5%
2020 Population by Age	
Total	193,841
0 - 4	5.9%
5 - 9	5.7%
10 - 14	6.1%
15 - 24	12.3%
25 - 34	12.4%
35 - 44	11.4%
45 - 54	11.7%
55 - 64	14.5%
65 - 74	11.7%
75 - 84	5.7%
85 +	2.5%
18 +	78.8%
2010 Population by Sex	
Males	91,189
Females	91,931
2015 Population by Sex	
Males	93,911
Females	94,493
2020 Population by Sex	
Males	96,660
Females	97,181

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Appendix EXHIBIT A11: Community Profile - Total Trade Area

### Community Profile

*Gibbs Planning Group*

Helena Total Trade area  
Area: 6,665.77 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.67400198  
Longitude: -111.896497

2010 Population by Race/Ethnicity	
Total	183,120
White Alone	92.0%
Black Alone	0.7%
American Indian Alone	3.0%
Asian Alone	0.7%
Pacific Islander Alone	0.1%
Some Other Race Alone	0.6%
Two or More Races	2.9%
Hispanic Origin	3.1%
Diversity Index	20.3
2015 Population by Race/Ethnicity	
Total	188,404
White Alone	90.6%
Black Alone	1.3%
American Indian Alone	3.2%
Asian Alone	0.8%
Pacific Islander Alone	0.1%
Some Other Race Alone	0.8%
Two or More Races	3.2%
Hispanic Origin	4.0%
Diversity Index	24.1
2020 Population by Race/Ethnicity	
Total	193,841
White Alone	89.0%
Black Alone	1.9%
American Indian Alone	3.4%
Asian Alone	1.0%
Pacific Islander Alone	0.1%
Some Other Race Alone	0.9%
Two or More Races	3.7%
Hispanic Origin	4.9%
Diversity Index	28.0
2010 Population by Relationship and Household Type	
Total	183,120
In Households	97.0%
In Family Households	77.7%
Householder	26.2%
Spouse	20.1%
Child	27.3%
Other relative	2.0%
Nonrelative	2.1%
In Nonfamily Households	19.3%
In Group Quarters	3.0%
Institutionalized Population	1.3%
Noninstitutionalized Population	1.7%

**Data Note:** Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.



## Appendix EXHIBIT A12: Community Profile - Total Trade Area

Gibbs Planning Group

### Community Profile

Helena Total Trade area  
Area: 6,665.77 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.67400198  
Longitude: -111.896497

<b>2015 Population 25+ by Educational Attainment</b>	
Total	129,996
Less than 9th Grade	1.9%
9th - 12th Grade, No Diploma	4.9%
High School Graduate	23.8%
GED/Alternative Credential	4.3%
Some College, No Degree	26.3%
Associate Degree	9.2%
Bachelor's Degree	19.2%
Graduate/Professional Degree	10.3%
<b>2015 Population 15+ by Marital Status</b>	
Total	154,525
Never Married	27.4%
Married	52.0%
Widowed	6.8%
Divorced	13.8%
<b>2015 Civilian Population 16+ in Labor Force</b>	
Civilian Employed	95.3%
Civilian Unemployed	4.7%
<b>2015 Employed Population 16+ by Industry</b>	
Total	92,415
Agriculture/Mining	3.7%
Construction	6.7%
Manufacturing	3.0%
Wholesale Trade	1.8%
Retail Trade	11.7%
Transportation/Utilities	5.0%
Information	1.2%
Finance/Insurance/Real Estate	6.9%
Services	47.1%
Public Administration	13.0%
<b>2015 Employed Population 16+ by Occupation</b>	
Total	92,415
White Collar	61.7%
Management/Business/Financial	14.9%
Professional	21.6%
Sales	9.5%
Administrative Support	15.7%
Services	19.5%
Blue Collar	18.8%
Farming/Forestry/Fishing	0.8%
Construction/Extraction	5.4%
Installation/Maintenance/Repair	3.5%
Production	3.5%
Transportation/Material Moving	5.6%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## Business Summary

### Gibbs Planning Group

Helena Primary Trade Area  
Area : 482.15 square miles

Prepared by Gibbs Planning Group

Latitude: 46.61757733  
Longitude: -112.017990

Data for all businesses in area		Number	Percent	Employees
		Number	Percent	Number
Total Businesses:		3,826		
Total Employees:		46,662		
Total Residential Population:		67,192		
Employee/Residential Population Ratio:		0.69:1		
by SIC Codes		Number	Percent	Number
Agriculture & Mining		103	2.7%	419
Construction		313	8.2%	1,960
Manufacturing		88	2.3%	810
Transportation		115	3.0%	1,216
Communication		32	0.8%	301
Utility		9	0.2%	95
Wholesale Trade		137	3.6%	1,117
Retail Trade Summary		626	16.4%	7,580
Home Improvement		50	1.3%	671
General Merchandise Stores		17	0.4%	1,406
Food Stores		51	1.3%	854
Auto Dealers, Gas Stations, Auto Aftermarket		76	2.0%	674
Apparel & Accessory Stores		25	0.7%	88
Furniture & Home Furnishings		68	1.8%	294
Eating & Drinking Places		157	4.1%	2,541
Miscellaneous Retail		181	4.7%	1,052
Finance, Insurance, Real Estate Summary		433	11.3%	3,485
Banks, Savings & Lending Institutions		175	4.6%	820
Securities Brokers		31	0.8%	189
Insurance Carriers & Agents		96	2.5%	1,574
Real Estate, Holding, Other Investment Offices		131	3.4%	952
Services Summary		1,489	38.9%	14,629
Hotels & Lodging		36	0.9%	529
Automotive Services		102	2.7%	405
Motion Pictures & Amusements		94	2.5%	890
Health Services		193	5.0%	3,944
Legal Services		80	2.1%	400
Education Institutions & Libraries		62	1.6%	2,011
Other Services		922	24.1%	6,449
Government		354	9.3%	14,626
Unclassified Establishments		127	3.3%	424
Totals		3,826	100.0%	46,662

Source : Copyright 2015 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

## Gibbs Planning Group

## Business Summary

Helena Primary Trade Area  
Area: 482.15 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.61757733  
Longitude: -112.017990

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	29	0.8%	148	0.3%
Mining	4	0.1%	8	0.0%
Utilities	5	0.1%	69	0.1%
Construction	336	8.8%	2,280	4.9%
Manufacturing	107	2.8%	807	1.7%
Wholesale Trade	184	3.5%	1,110	2.4%
Retail Trade	435	11.4%	4,862	10.4%
Motor Vehicle & Parts Dealers	63	1.6%	525	1.1%
Furniture & Home Furnishings Stores	28	0.7%	142	0.3%
Electronics & Appliance Stores	24	0.6%	107	0.2%
Bldg Material & Garden Equipment & Supplies Dealers	49	1.3%	663	1.4%
Food & Beverage Stores	42	1.1%	749	1.6%
Health & Personal Care Stores	43	1.1%	227	0.5%
Gasoline Stations	13	0.3%	149	0.3%
Clothing & Clothing Accessories Stores	31	0.8%	110	0.2%
Sport Goods, Hobby, Book, & Music Stores	41	1.1%	339	0.7%
General Merchandise Stores	17	0.4%	1,406	3.0%
Miscellaneous Store Retailers	75	2.0%	407	0.9%
Nonstore Retailers	8	0.2%	36	0.1%
Transportation & Warehousing	65	1.7%	734	1.6%
Information	86	2.2%	865	1.9%
Finance & Insurance	312	8.2%	2,551	5.5%
Central Bank/Credit Intermediation & Related Activities	183	4.8%	837	1.8%
Securities, Commodity Contracts & Other Financial Investments	32	0.8%	140	0.3%
Insurance Carriers & Related Activities; Funds, Trusts & Other	96	2.5%	1,574	3.4%
Real Estate, Rental & Leasing	192	5.0%	1,275	2.7%
Professional, Scientific & Tech Services	368	9.6%	2,557	5.5%
Legal Services	89	2.3%	448	1.0%
Management of Companies & Enterprises	3	0.1%	126	0.3%
Administrative & Support & Waste Management & Remediation	137	3.6%	913	2.0%
Educational Services	66	1.8%	1,877	4.0%
Health Care & Social Assistance	302	7.9%	5,381	11.5%
Arts, Entertainment & Recreation	74	1.9%	881	1.9%
Accommodation & Food Services	194	5.1%	3,085	6.6%
Accommodation	36	0.9%	529	1.1%
Food Services & Drinking Places	158	4.1%	2,556	5.5%
Other Services (except Public Administration)	493	12.9%	2,063	4.4%
Automotive Repair & Maintenance	80	2.1%	314	0.7%
Public Administration	356	9.3%	14,650	31.4%
Unclassified Establishments	126	3.3%	418	0.9%
Total	3,826	100.0%	46,662	100.0%

Source: Copyright 2015 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

Helena Total Trade area  
Area: 6,665.77 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.67400198  
Longitude: -111.896497

Data for all businesses in area			
	Total Businesses:	10,422	
	Total Employees:	112,307	
	Total Residential Population:	886,404	
	Employee/Residential Population Ratio:	0.6:1	
by SIC Codes	Number	Percent	Employees Number Percent
Agriculture & Mining	275	2.6%	1,929 1.7%
Construction	827	7.9%	4,928 4.4%
Manufacturing	271	2.6%	3,121 2.8%
Transportation	322	3.1%	2,870 2.6%
Communication	96	0.9%	1,063 0.9%
Utility	37	0.4%	340 0.3%
Wholesale Trade	408	3.9%	3,657 3.3%
Retail Trade Summary	1,965	18.9%	21,102 18.8%
Home Improvement	138	1.3%	1,478 1.3%
General Merchandise Stores	41	0.4%	3,283 2.9%
Food Stores	164	1.6%	2,330 2.1%
Auto Dealers, Gas Stations, Auto Aftermarket	244	2.3%	2,143 1.9%
Apparel & Accessory Stores	87	0.8%	395 0.4%
Furniture & Home Furnishings	193	1.9%	952 0.8%
Eating & Drinking Places	531	5.1%	7,387 6.6%
Miscellaneous Retail	567	5.4%	3,134 2.8%
Finance, Insurance, Real Estate Summary	1,246	12.0%	7,115 6.3%
Banks, Savings & Lending Institutions	567	5.4%	1,877 1.7%
Securities Brokers	79	0.8%	818 0.7%
Insurance Carriers & Agents	260	2.5%	2,430 2.2%
Real Estate, Holding, Other Investment Offices	340	3.3%	1,990 1.8%
Services Summary	3,933	37.7%	41,253 36.7%
Hotels & Lodging	186	1.3%	1,881 1.7%
Automotive Services	275	2.6%	1,866 1.7%
Motion Pictures & Amusements	307	2.9%	2,166 1.9%
Health Services	543	5.2%	13,582 12.1%
Legal Services	171	1.6%	920 0.8%
Education Institutions & Libraries	191	1.8%	6,059 5.4%
Other Services	2,310	22.2%	15,459 13.8%
Government	760	7.3%	24,027 21.4%
Unclassified Establishments	282	2.7%	902 0.8%
Totals	10,422	100.0%	112,307 100.0%

Source: Copyright 2015 InfoGroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

## Appendix EXHIBIT B4: Business Summary - Total Trade Area

### Business Summary

### Gibbs Planning Group

Prepared by Gibbs Planning Group  
 Latitude: 46.67400198  
 Longitude: -111.896497

Helena Total Trade area  
 Area: 6,665.77 square miles

by NAICS Codes	Businesses Number	Percent	Employees Number	Percent
Agriculture, Forestry, Fishing & Hunting	19	1.1%	70	0.6%
Mining	11	0.7%	534	0.5%
Utilities	24	0.2%	207	0.2%
Construction	887	8.5%	5,442	4.8%
Manufacturing	307	2.9%	2,725	2.4%
Wholesale Trade	398	3.8%	3,596	3.2%
Retail Trade	1,354	13.0%	13,345	11.9%
Motor Vehicle & Parts Dealers	199	1.9%	1,674	1.5%
Furniture & Home Furnishings Stores	87	0.8%	485	0.4%
Electronics & Appliance Stores	70	0.7%	364	0.3%
Bldg Material & Garden Equipment & Supplies Dealers	135	1.3%	1,465	1.3%
Food & Beverage Stores	138	1.3%	2,143	1.9%
Health & Personal Care Stores	131	1.3%	905	0.8%
Gasoline Stations	45	0.4%	469	0.4%
Clothing & Clothing Accessories Stores	114	1.1%	490	0.4%
Sport Goods, Hobby, Book, & Music Stores	139	1.3%	855	0.8%
General Merchandise Stores	41	0.4%	3,283	2.9%
Miscellaneous Store Retailers	230	2.2%	1,136	1.0%
Nonstore Retailers	25	0.2%	76	0.1%
Transportation & Warehousing	227	2.2%	2,215	2.0%
Information	221	2.1%	2,415	2.2%
Finance & Insurance	931	8.9%	5,213	4.6%
Central Bank/Credit Intermediation, & Related Activities	585	5.6%	1,916	1.7%
Securities, Commodity Contracts & Other Financial Investments	85	0.8%	863	0.8%
Insurance Carriers & Related Activities; Funds, Trusts & Other	261	2.5%	2,434	2.2%
Real Estate, Rental & Leasing	489	4.7%	2,496	2.2%
Professional, Scientific & Tech Services	808	7.8%	5,382	4.8%
Legal Services	197	1.9%	1,070	1.0%
Management of Companies & Enterprises	4	0.0%	127	0.1%
Administrative & Support & Waste Management & Remediation	330	3.2%	1,992	1.8%
Educational Services	201	1.9%	5,883	5.2%
Health Care & Social Assistance	872	8.4%	17,619	15.7%
Arts, Entertainment & Recreation	243	2.3%	2,073	1.8%
Accommodation & Food Services	672	6.4%	9,300	8.3%
Accommodation	136	1.3%	1,881	1.7%
Food Services & Drinking Places	536	5.1%	7,419	6.6%
Other Services (except Public Administration)	1,270	12.2%	5,971	5.3%
Automotive Repair & Maintenance	210	2.0%	918	0.8%
Public Administration	771	7.4%	24,128	21.5%
Unclassified Establishments	283	2.7%	934	0.8%
<b>Total</b>	<b>10,422</b>	<b>100.0%</b>	<b>112,307</b>	<b>100.0%</b>

Source: Copyright 2015 Inlogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

## Appendix EXHIBIT C1: Housing Profile - Primary Trade Area

Gibbs Planning Group

### Housing Profile

Helena Primary Trade Area  
Area: 482.15 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.61757733  
Longitude: -112.017990

Population		Households	
2010 Total Population	64,276	2015 Median Household Income	\$57,444
2015 Total Population	67,192	2020 Median Household Income	\$66,647
2020 Total Population	70,080	2015-2020 Annual Rate	3.02%
2015-2020 Annual Rate	0.85%		

Housing Units by Occupancy Status and Tenure	Census 2010		2015		2020	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	28,046	100.0%	29,733	100.0%	31,202	100.0%
Occupied	26,586	94.8%	28,186	94.8%	29,548	94.7%
Owner	18,628	66.4%	18,973	63.8%	19,892	63.8%
Renter	7,958	28.4%	9,213	31.0%	9,656	30.9%
Vacant	1,459	5.2%	1,547	5.2%	1,654	5.3%

Owner Occupied Housing Units by Value	2015		2020	
	Number	Percent	Number	Percent
Total	18,973	100.0%	19,891	100.0%
<\$50,000	570	3.0%	357	1.8%
\$50,000-\$99,999	1,200	6.3%	944	4.7%
\$100,000-\$149,999	2,616	13.8%	2,129	10.7%
\$150,000-\$199,999	3,723	19.6%	3,042	15.3%
\$200,000-\$249,999	3,279	17.3%	3,502	17.6%
\$250,000-\$299,999	2,414	12.7%	2,915	14.7%
\$300,000-\$399,999	2,664	14.0%	2,937	14.8%
\$400,000-\$499,999	1,210	6.4%	1,886	9.5%
\$500,000-\$749,999	904	4.8%	1,396	7.0%
\$750,000-\$999,999	171	0.9%	448	2.3%
\$1,000,000+	222	1.2%	335	1.7%
Median Value		\$221,005		\$249,593
Average Value		\$261,078		\$303,035

**Data Note:** Persons of Hispanic Origin may be of any race.  
**Source:** U.S. Census Bureau, Census 2010 Summary File 1.

## Appendix EXHIBIT C2: Housing Profile - Primary Trade Area

Gibbs Planning Group

### Housing Profile

Helena Primary Trade Area  
Area: 482.15 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.61757733  
Longitude: -112.017990

Census 2010 Owner Occupied Housing Units by Mortgage Status		
	Number	Percent
Total	18,629	100.0%
Owned with a Mortgage/Loan	13,086	70.2%
Owned Free and Clear	5,543	29.8%

Census 2010 Vacant Housing Units by Status		
	Number	Percent
Total	1,459	100.0%
For Rent	353	24.2%
Rented- Not Occupied	38	2.6%
For Sale Only	257	17.6%
Sold - Not Occupied	48	3.3%
Seasonal/Recreational/Occasional Use	712	48.8%
For Migrant Workers	0	0.0%
Other Vacant	390	26.7%

Census 2010 Occupied Housing Units by Age of Householder and Home Ownership			
	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	26,587	18,630	70.1%
15-24	1,207	226	18.7%
25-34	3,737	1,869	50.0%
35-44	4,194	2,902	69.2%
45-54	5,992	4,583	76.5%
55-64	5,862	4,776	81.5%
65-74	3,101	2,561	82.6%
75-84	1,701	1,284	75.5%
85+	793	429	54.1%

Census 2010 Occupied Housing Units by Race/Ethnicity of Householder and Home Ownership			
	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	26,588	18,629	70.1%
White Alone	25,470	18,079	71.0%
Black/African American	53	17	32.1%
American Indian/Alaska	442	209	47.3%
Asian Alone	116	67	57.8%
Pacific Islander Alone	12	5	41.7%
Other Race Alone	74	34	45.9%
Two or More Races	421	218	51.8%
Hispanic Origin	398	193	48.5%

Census 2010 Occupied Housing Units by Size and Home Ownership			
	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	26,589	18,630	70.1%
1-Person	7,910	4,222	53.4%
2-Person	9,851	7,779	79.0%
3-Person	3,700	2,714	73.4%
4-Person	3,179	2,453	77.2%
5-Person	1,275	980	76.9%
6-Person	459	329	71.7%
7+ Person	215	153	71.2%

**Data Note:** Persons of Hispanic Origin may be of any race.  
**Source:** U.S. Census Bureau, Census 2010 Summary File 1.

## Appendix EXHIBIT C3: Housing Profile - Total Trade Area

Gibbs Planning Group

### Housing Profile

Helena Total Trade area  
Area: 6,665.77 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.67400198  
Longitude: -111.896497

Population		Households	
2010 Total Population	183,120	2015 Median Household Income	\$47,014
2015 Total Population	188,404	2020 Median Household Income	\$54,281
2020 Total Population	193,841	2015-2020 Annual Rate	2.92%
2015-2020 Annual Rate	0.57%		

Housing Units by Occupancy Status and Tenure	Census 2010		2015		2020	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	85,501	100.0%	89,199	100.0%	92,452	100.0%
Occupied	77,136	90.2%	80,498	90.2%	83,231	90.0%
Owner	52,236	61.1%	52,131	58.4%	53,928	58.3%
Renter	24,900	29.1%	28,367	31.8%	29,303	31.7%
Vacant	8,365	9.8%	8,701	9.8%	9,221	10.0%

Owner Occupied Housing Units by Value	2015		2020	
	Number	Percent	Number	Percent
Total	52,119	100.0%	53,915	100.0%
<\$50,000	2,162	4.1%	1,347	2.5%
\$50,000-\$99,999	5,163	9.9%	4,055	7.5%
\$100,000-\$149,999	9,158	17.6%	6,825	12.7%
\$150,000-\$199,999	10,470	20.1%	8,934	16.6%
\$200,000-\$249,999	8,056	15.5%	8,905	16.5%
\$250,000-\$299,999	5,519	10.6%	6,875	12.8%
\$300,000-\$399,999	5,899	11.3%	7,007	13.0%
\$400,000-\$499,999	2,651	5.1%	4,644	8.6%
\$500,000-\$749,999	2,064	4.0%	3,363	6.2%
\$750,000-\$999,999	404	0.8%	1,160	2.2%
\$1,000,000+	573	1.1%	800	1.5%
Median Value		\$195,733		\$232,546
Average Value		\$237,264		\$283,924

**Data Note:** Persons of Hispanic Origin may be of any race.  
**Source:** U.S. Census Bureau, Census 2010 Summary File 1.



## Appendix EXHIBIT C4: Housing Profile - Total Trade Area

Gibbs Planning Group

### Housing Profile

Helena Total Trade area  
Area: 6,665.77 square miles

Prepared by Gibbs Planning Group  
Latitude: 46.67400198  
Longitude: -111.896497

Census 2010 Owner Occupied Housing Units by Mortgage Status		
	Number	Percent
Total	52,236	100.0%
Owned with a Mortgage/Loan	34,284	65.6%
Owned Free and Clear	17,952	34.4%

Census 2010 Vacant Housing Units by Status		
	Number	Percent
Total	8,365	100.0%
For Rent	1,646	19.7%
Rented- Not Occupied	130	1.6%
For Sale Only	844	10.1%
Sold - Not Occupied	230	2.7%
Seasonal/Recreational/Occasional Use	3,247	38.8%
For Migrant Workers	7	0.1%
Other Vacant	2,261	27.0%

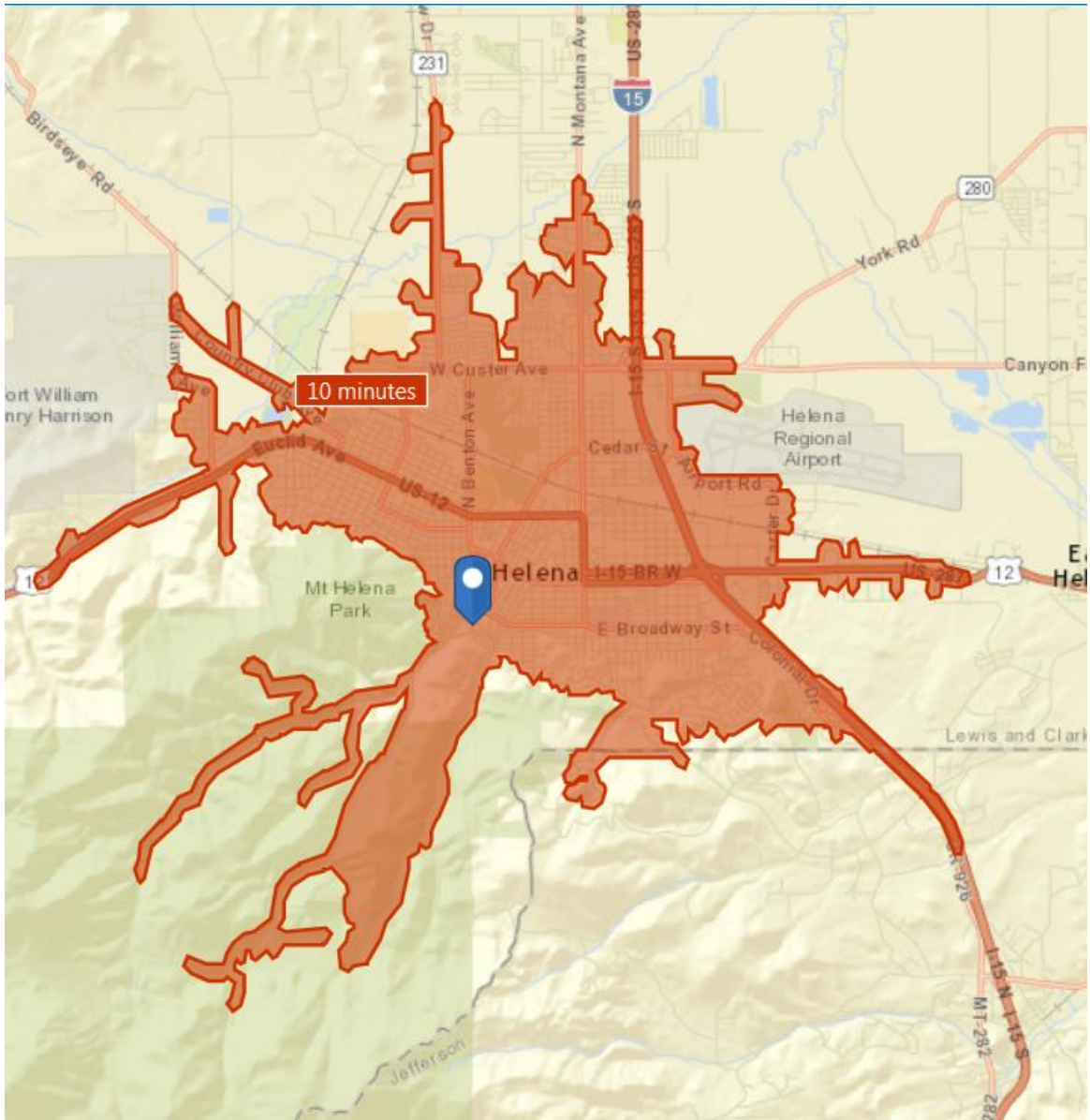
Census 2010 Occupied Housing Units by Age of Householder and Home Ownership			
	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	77,136	52,236	67.7%
15-24	4,538	843	18.6%
25-34	10,974	5,195	47.3%
35-44	11,362	7,480	65.8%
45-54	16,406	12,173	74.2%
55-64	15,322	12,263	80.0%
65-74	9,705	7,952	81.9%
75-84	6,146	4,753	77.3%
85+	2,683	1,577	58.8%

Census 2010 Occupied Housing Units by Race/Ethnicity of Householder and Home Ownership			
	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	77,136	52,236	67.7%
White Alone	72,667	50,453	69.4%
Black/African American	459	116	25.3%
American Indian/Alaska	1,870	671	35.9%
Asian Alone	403	201	49.9%
Pacific Islander Alone	52	20	38.5%
Other Race Alone	319	136	42.6%
Two or More Races	1,366	639	46.8%
Hispanic Origin	1,619	760	46.9%

Census 2010 Occupied Housing Units by Size and Home Ownership			
	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	77,136	52,236	67.7%
1-Person	24,177	12,904	53.4%
2-Person	28,086	21,579	76.8%
3-Person	10,776	7,439	69.0%
4-Person	8,526	6,351	74.5%
5-Person	3,629	2,632	72.5%
6-Person	1,302	903	69.4%
7+ Person	640	428	66.9%

**Data Note:** Persons of Hispanic Origin may be of any race.  
**Source:** U.S. Census Bureau, Census 2010 Summary File 1.

Appendix EXHIBIT E: 10-Minute Drive Time Map



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## Appendix EXHIBIT D: Economic Contribution of Nonresident Spending

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7-24-2015

### 2014 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

Kara Grau

*The University of Montana - Missoula*

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# 2014 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

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Kara Grau, M.S.

7/24/2015

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 17 of the 56 counties in the state which receive the highest spending.

## **2014 Economic Contribution of Nonresident Travel Spending in Montana Regions and Counties**

Prepared by

Kara Grau, M.S.

Institute for Tourism & Recreation Research  
College of Forestry and Conservation  
The University of Montana  
Missoula, MT 59812  
[www.itrr.umt.edu](http://www.itrr.umt.edu)

Research Report 2015-7

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### **Abstract**

Money spent by those traveling to and through Montana has an effect not only on the businesses where spending occurs, but it ripples throughout the state's economy, as well. Statewide, spending by nonresidents (averaged over two years) totaled \$3.79 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 nearly \$3.8 billion throughout Montana during 2014 (estimate is an average of 2013 and 2014 nonresident spending). This was an increase of 9.3 percent over the previous year's spending estimate of \$3.47 billion (2012-2013 average).

- Glacier and Yellowstone travel regions received the highest percentage of nonresident spending, 33 and 26 percent, respectively.
- Of the 56 counties in Montana, Flathead (\$668 million) and Gallatin (\$662 million) Counties had the highest amount of spending.
- Seventeen counties had high enough nonresident traveler spending (approximately \$50 million, or greater) to allow for an economic impact analysis, the results of which are presented in the report.

# 2014 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2015

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# 2014 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2015

## 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 17 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 - 2014 Average Nonresident Spending per Expenditure Category**

Expenditure Category	2014 Total Nonresident Spending (2014 \$s)
Gasoline, Diesel	\$1,211,950,000
Restaurant, Bar	\$672,950,000
Retail sales	\$657,230,000
Hotel, Motel	\$374,380,000
Groceries, Snacks	\$331,910,000
Outfitter, Guide	\$194,830,000
Auto Rental	\$83,330,000
Licenses, Entrance Fees	\$82,300,000
Rental cabin, Condo	\$57,300,000
Vehicle Repairs	\$44,270,000
Campground, RV Park	\$25,970,000
Misc. Services	\$25,640,000
Gambling	\$15,800,000
Farmers Market	\$7,350,000
Transp. Fares	\$6,660,000
<b>TOTAL</b>	<b>\$3,791,870,000</b>

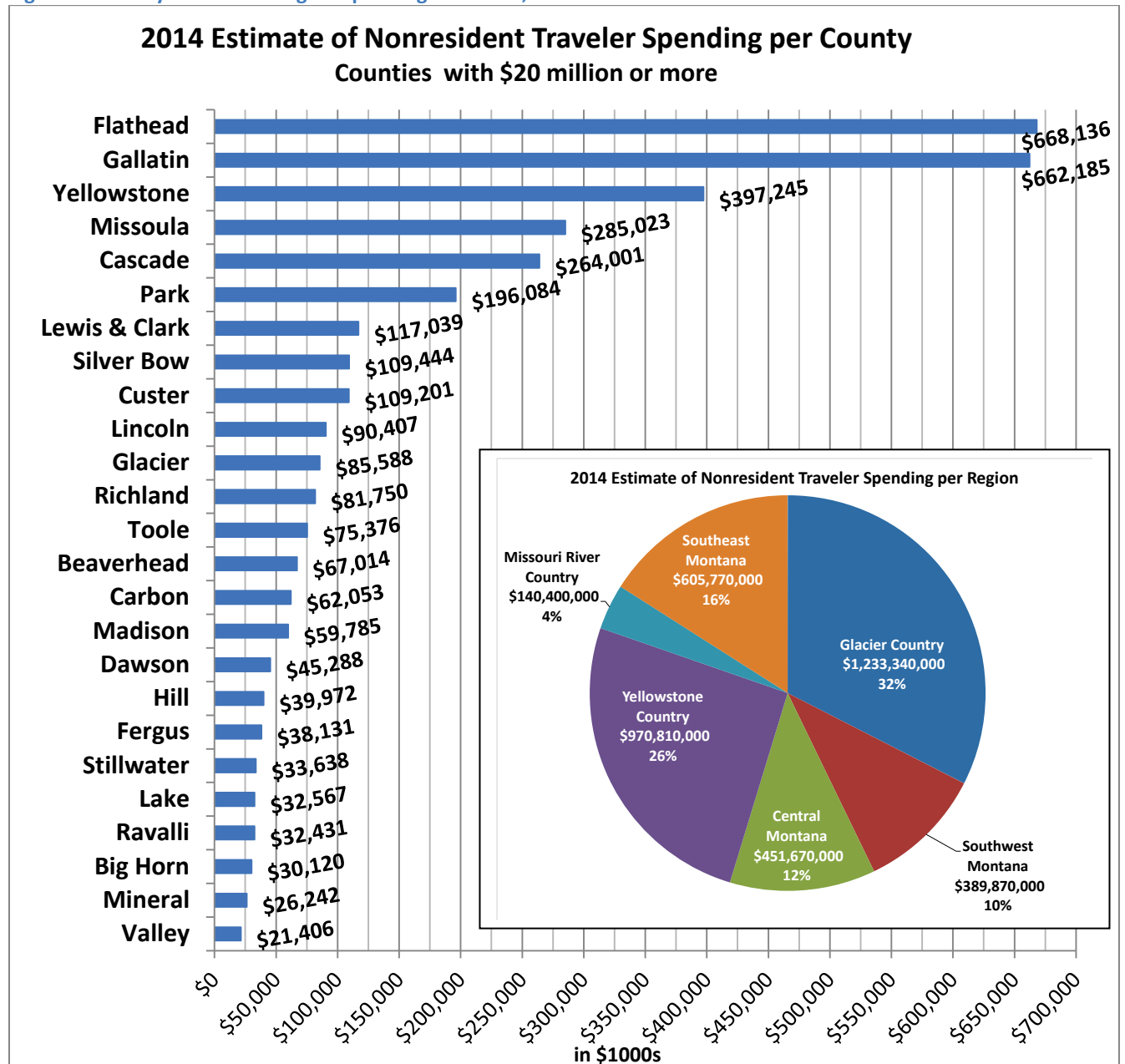


# 2014 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2015

The statewide total 2014 average spending is presented in Table 1. For the analyses highlighted in this report, the 2013 (inflation adjusted to 2014 \$s) and 2014 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, 2014



# 2014 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2015

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 17 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 17 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 23 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, Carbon, Cascade, Custer, Dawson, Flathead, Gallatin, Glacier, Lewis and Clark, Madison, Missoula, Park, Richland, Silver Bow, Toole and Yellowstone. Other counties totaled less than approximately \$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 – 2014 Nonresident Economic Impacts**

**Central Montana - 6**

**Glacier Country - 7**

**Missouri River Country - 8**

**Southeast Montana - 9**

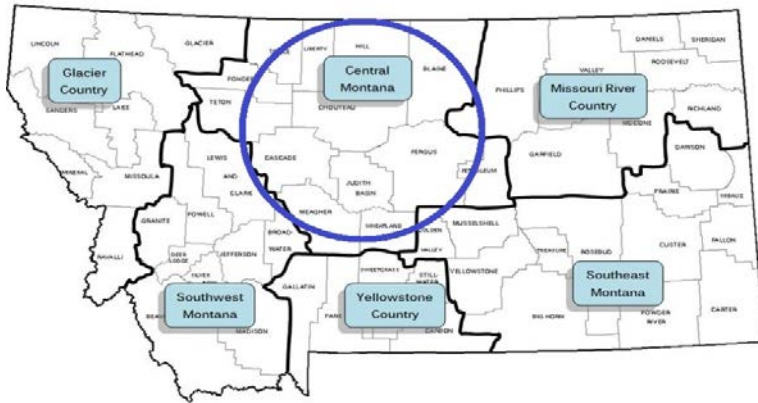
**Southwest Montana - 10**

**Yellowstone Country - 11**

# 2014 Nonresident Traveler Expenditures & Economic Contribution in Central Montana Travel Region

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Central Montana Travel Region



2014 Nonresident Expenditure Percentages in Central Montana Travel Region

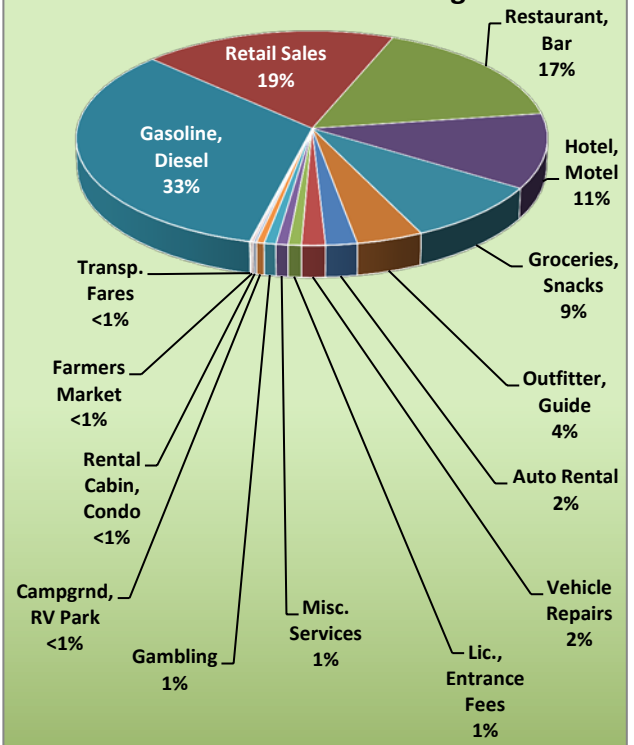


Table 1 - Total Nonresident Spending in Central Montana\*<sup>0</sup>

Gasoline, Diesel	\$150,220,000	Vehicle Repairs	\$6,720,000
Retail Sales	\$85,590,000	Lic., Entrance Fees	\$3,750,000
Restaurant, Bar	\$75,220,000	Misc. Services	\$3,390,000
Hotel, Motel	\$50,840,000	Gambling	\$3,360,000
Groceries, Snacks	\$40,530,000	Campground, RV Park	\$2,190,000
Outfitter, Guide	\$18,970,000	Rental Cabin, Condo	\$860,000
Auto Rental	\$8,960,000	Farmers Market	\$640,000
		Transportation Fares	\$410,000
<b>TOTAL</b>	<b>\$451,650,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Central Montana Travel Region

- 2014 average spending\* in Central Montana by nonresident visitors to Montana totaled \$451.7 million.
- This \$451.7 million in local spending directly supports \$349.0 million of economic activity in the region, and supports an additional \$178.0 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$527.0 million.

Table 2 - 2014 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$349,020,000	\$94,520,000	\$83,490,000	\$527,030,000
Employment (# of jobs)	4,200	680	720	5,600
Employee Compensation	\$85,230,000	\$19,500,000	\$20,820,000	\$125,550,000
Proprietor Income	\$18,670,000	\$5,930,000	\$4,480,000	\$29,080,000
Other Property Type Income	\$40,450,000	\$15,960,000	\$15,520,000	\$71,930,000
State & Local Taxes <sup>^</sup>	—	—	—	\$23,130,000

**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 Output** 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.

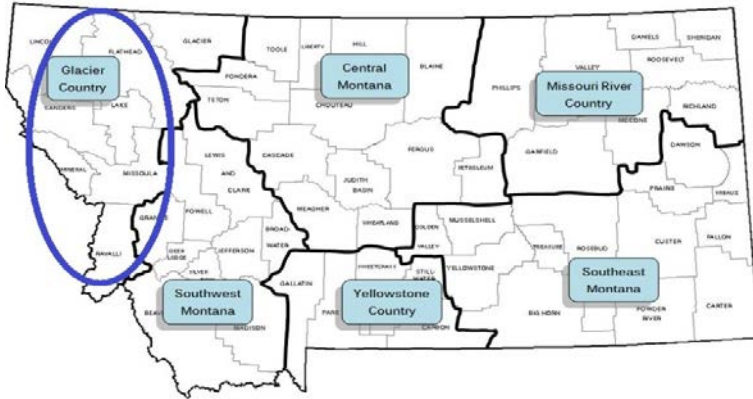
\*Data is collected at the state level. The two-year average of expenditures (2014 \$s) was used to help account for small and varying sample sizes at the county level.

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

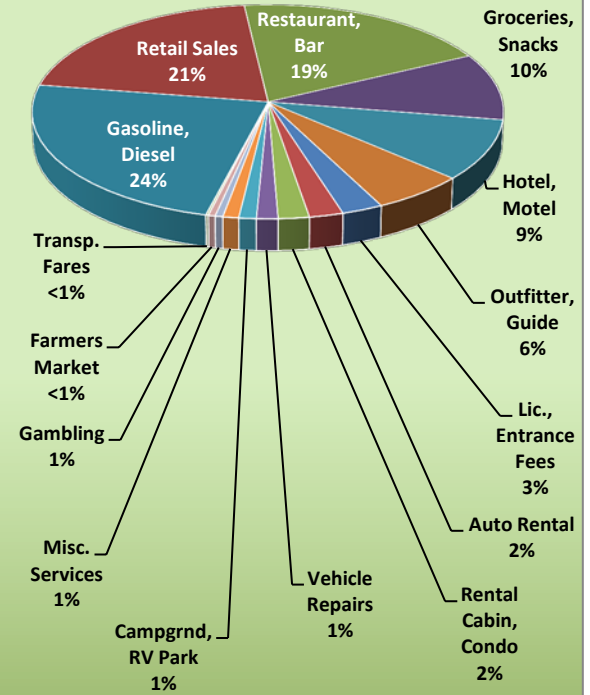
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Glacier Country Travel Region

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Glacier Country Travel Region



**2014 Nonresident Expenditure Percentages in Glacier Country Travel Region**



**Table 1 - Total Nonresident Spending in Glacier Country\*<sup>0</sup>**

Gasoline, Diesel	\$292,180,000	Auto Rental	\$26,400,000
Retail Sales	\$254,630,000	Rental Cabin, Condo	\$24,060,000
Restaurant, Bar	\$238,200,000	Vehicle Repairs	\$16,520,000
Groceries, Snacks	\$124,780,000	Campground, RV Park	\$13,500,000
Hotel, Motel	\$112,640,000	Misc. Services	\$12,220,000
Outfitter, Guide	\$72,860,000	Gambling	\$5,950,000
Lic., Entrance Fees	\$32,010,000	Farmers Market	\$5,280,000
		Transportation Fares	\$2,100,000
<b>TOTAL \$1,233,330,000</b>			

## 2014 Contribution of Nonresident Traveler Expenditures in Glacier Country Travel Region

- 2014 average spending\* in Glacier Country by nonresident visitors to Montana totaled \$1.2 billion.
- This \$1.2 billion in local spending directly supports \$944.9 million of economic activity in the region, and supports an additional \$627.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.3 billion.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$944,860,000	\$334,190,000	\$293,610,000	\$1,572,660,000
Employment (# of jobs)	12,420	2,540	2,680	17,640
Employee Compensation	\$270,180,000	\$63,130,000	\$77,410,000	\$410,720,000
Proprietor Income	\$52,240,000	\$21,250,000	\$15,290,000	\$88,780,000
Other Property Type Income	\$90,090,000	\$69,580,000	\$59,750,000	\$219,420,000
State & Local Taxes <sup>^</sup>	—	—	—	\$71,230,000

**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 Output** 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.

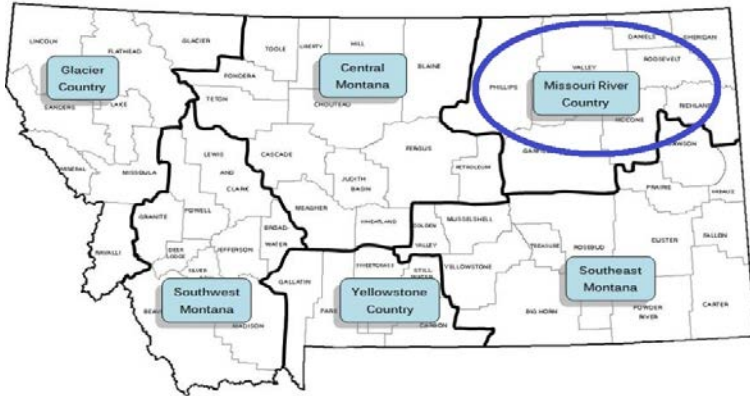
\*Data is collected at the state level. The two-year average of expenditures (2014 \$s) was used to help account for small and varying sample sizes at the county level.

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

# 2014 Nonresident Traveler Expenditures & Economic Contribution in Missouri River Country Travel Region

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Missouri River Country Travel Region



2014 Nonresident Expenditure Percentages in Missouri River Country Travel Region

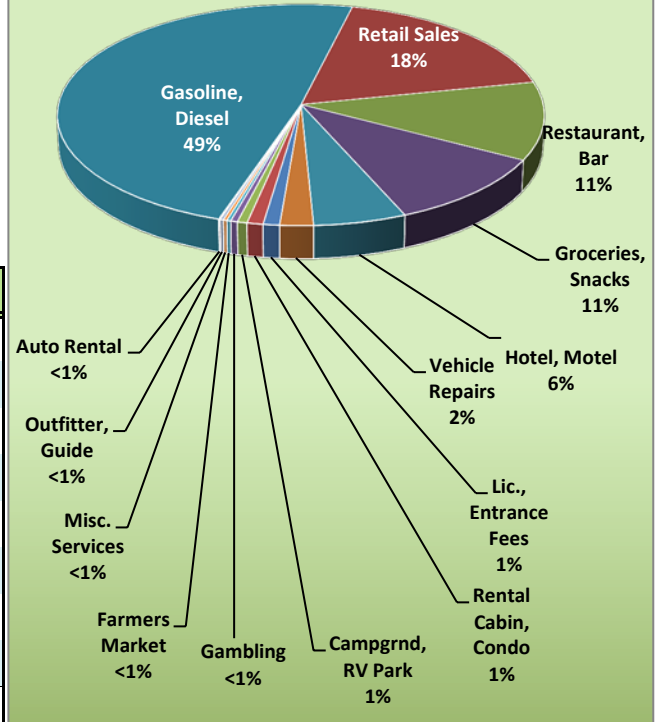


Table 1 - Total Nonresident Spending in Missouri River Country<sup>\*,0</sup>

Gasoline, Diesel	\$68,390,000	Rental Cabin, Condo	\$1,360,000
Retail Sales	\$25,200,000	Campground, RV Park	\$830,000
Restaurant, Bar	\$16,000,000	Gambling	\$580,000
Groceries, Snacks	\$14,800,000	Farmers Market	\$340,000
Hotel, Motel	\$7,940,000	Misc. Services	\$300,000
Vehicle Repairs	\$2,850,000	Outfitter, Guide	\$290,000
Lic., Entrance Fees	\$1,390,000	Auto Rental	\$130,000
		Transportation Fares	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$140,400,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Missouri River Country Travel Region

- 2014 average spending\* in Missouri River Country by nonresident visitors to Montana totaled \$140.4 million.
- This \$140.4 million in local spending directly supports \$68.4 million of economic activity in the region, and supports an additional \$27.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$96.3 million.

Table 2 - 2014 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$68,380,000	\$13,630,000	\$14,310,000	\$96,320,000
Employment (# of jobs)	950	110	120	1,180
Employee Compensation	\$24,450,000	\$3,110,000	\$3,490,000	\$31,050,000
Proprietor Income	\$4,570,000	\$520,000	\$520,000	\$5,610,000
Other Property Type Income	\$7,150,000	\$2,320,000	\$2,940,000	\$12,410,000
State & Local Taxes <sup>^</sup>	—	—	—	\$5,560,000

**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 Output** 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.

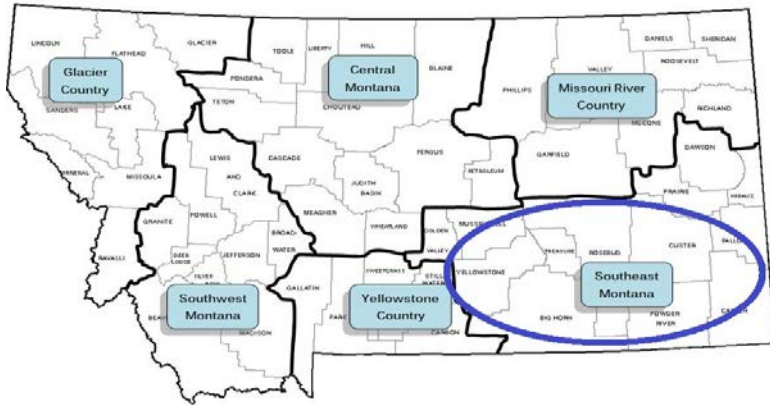
\*Data is collected at the state level. The two-year average of expenditures (2014 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.

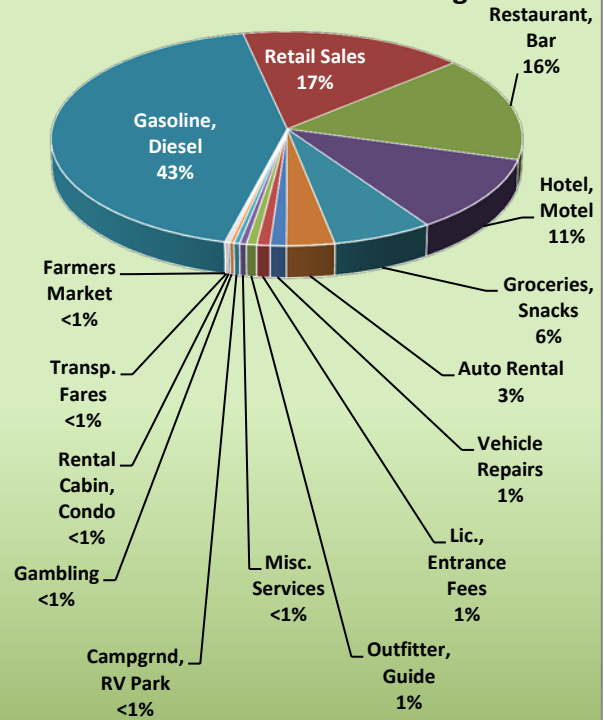
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Southeast Montana Travel Region

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Southeast Montana Travel Region



**2014 Nonresident Expenditure Percentages in Southeast Montana Travel Region**



**Table 1 - Total Nonresident Spending in Southeast Montana\*<sup>0</sup>**

Gasoline, Diesel	\$259,510,000	Lic., Entrance Fees	\$5,010,000
Retail Sales	\$101,840,000	Outfitter, Guide	\$3,870,000
Restaurant, Bar	\$97,150,000	Gambling	\$2,570,000
Hotel, Motel	\$67,350,000	Misc. Services	\$2,220,000
Groceries, Snacks	\$38,340,000	Campground, RV Park	\$1,500,000
Auto Rental	\$18,290,000	Transportation Fares	\$870,000
Vehicle Repairs	\$6,130,000	Rental Cabin, Condo	\$860,000
		Farmers Market	\$260,000
<b>TOTAL</b>	<b>\$605,770,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Southeast Montana Travel Region

- 2014 average spending\* in Southeast Montana by nonresident visitors to Montana totaled \$605.8 million.
- This \$605.8 million in local spending directly supports \$472.1 million of economic activity in the region, and supports an additional \$251.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$724.0million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$472,090,000	\$131,490,000	\$120,440,000	\$724,020,000
Employment (# of jobs)	4,910	920	1,010	6,840
Employee Compensation	\$119,130,000	\$33,060,000	\$34,290,000	\$186,480,000
Proprietor Income	\$12,900,000	\$5,320,000	\$4,270,000	\$22,490,000
Other Property Type Income	\$55,520,000	\$22,520,000	\$22,400,000	\$100,440,000
State & Local Taxes <sup>^</sup>	—	—	—	\$30,630,000

**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 Output** 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 (2014 \$s) was used to help account for small and varying sample sizes at the county level.

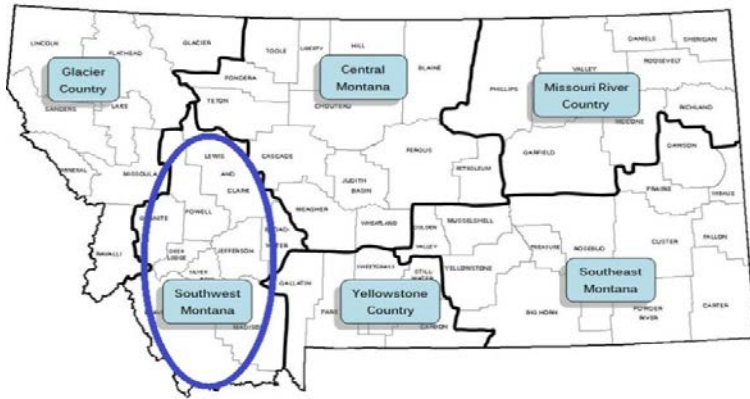
◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.



# 2014 Nonresident Traveler Expenditures & Economic Contribution in Southwest Montana Travel Region

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Southwest Montana Travel Region



2014 Nonresident Expenditure Percentages in Southwest Montana Travel Region

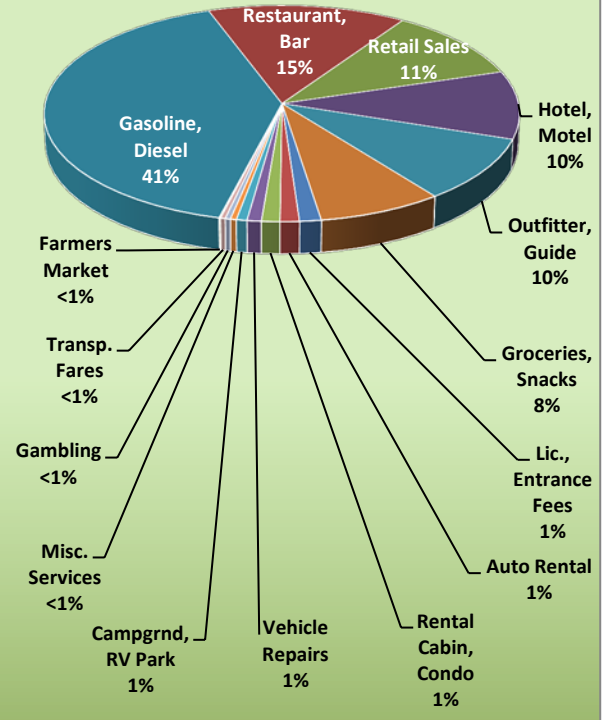


Table 1 - Total Nonresident Spending in Southwest Montana<sup>\*,0</sup>

Gasoline, Diesel	\$158,470,000	Auto Rental	\$4,640,000
Restaurant, Bar	\$57,370,000	Rental Cabin, Condo	\$4,460,000
Retail Sales	\$42,270,000	Vehicle Repairs	\$3,450,000
Hotel, Motel	\$39,650,000	Campground, RV Park	\$2,560,000
Outfitter, Guide	\$37,130,000	Misc. Services	\$1,450,000
Groceries, Snacks	\$30,370,000	Gambling	\$1,280,000
Lic., Entrance Fees	\$5,250,000	Transportation Fares	\$1,130,000
		Farmers Market	\$380,000
		<b>TOTAL</b>	<b>\$389,860,000</b>

## 2014 Contribution of Nonresident Traveler Expenditures in Southwest Montana Travel Region

- 2014 average spending\* in Southwest Montana by nonresident visitors to Montana totaled \$389.9 million.
- This \$389.9 million in local spending directly supports \$315.3 million of economic activity in the region, and supports an additional \$190.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$367.9 million.

Table 2 - 2014 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$315,300,000	\$97,520,000	\$93,440,000	\$506,260,000
Employment (# of jobs)	3,310	560	830	4,700
Employee Compensation	\$80,040,000	\$16,270,000	\$24,400,000	\$120,710,000
Proprietor Income	\$23,510,000	\$26,600,000	\$4,660,000	\$54,770,000
Other Property Type Income	\$24,620,000	\$13,830,000	\$18,440,000	\$56,890,000
State & Local Taxes <sup>^</sup>	—	—	—	\$22,460,000

**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 Output** 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.

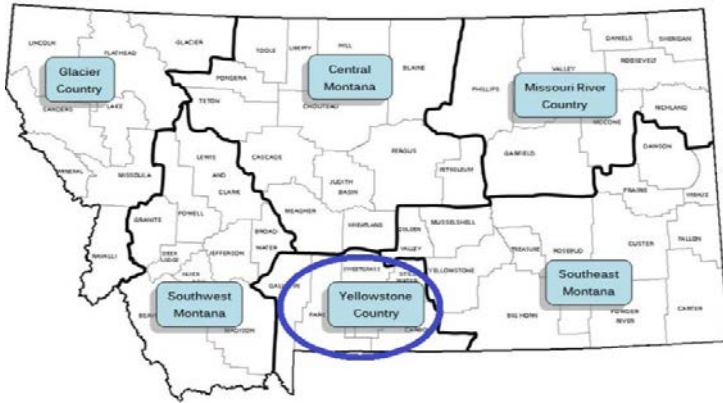
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<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.

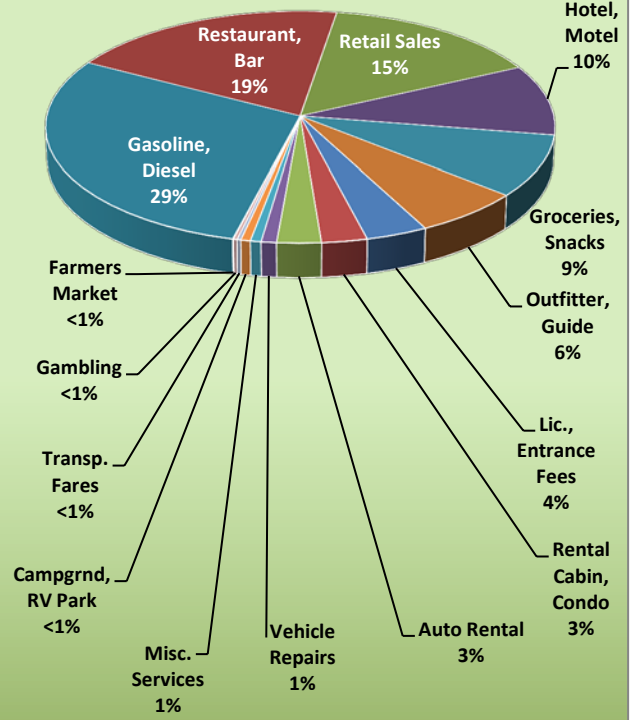
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone Country Travel Region

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Yellowstone Country Travel Region



2014 Nonresident  
Expenditure Percentages in  
Yellowstone Country Travel Region



**Table 1 - Total Nonresident Spending in Yellowstone Country\*<sup>0</sup>**

Gasoline, Diesel	\$283,190,000	Rental Cabin, Condo	\$25,690,000
Restaurant, Bar	\$189,000,000	Auto Rental	\$24,900,000
Retail Sales	\$147,690,000	Vehicle Repairs	\$8,600,000
Hotel, Motel	\$95,960,000	Misc. Services	\$6,050,000
Groceries, Snacks	\$83,090,000	Campground, RV Park	\$5,400,000
Outfitter, Guide	\$61,710,000	Transportation Fares	\$2,150,000
Lic., Entrance Fees	\$34,890,000	Gambling	\$2,050,000
		Farmers Market	\$440,000
<b>TOTAL</b>		<b>\$970,810,000</b>	

## 2014 Contribution of Nonresident Traveler Expenditures in Yellowstone Country Travel Region

- 2014 average spending\* in Yellowstone Country by nonresident visitors to Montana totaled \$970.8 million.
- This \$970.8 million in local spending directly supports \$779.5 million of economic activity in the region, and supports an additional \$476.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.3 billion.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$779,500,000	\$273,760,000	\$202,310,000	\$1,255,570,000
Employment (# of jobs)	9,690	2,010	1,820	13,520
Employee Compensation	\$224,720,000	\$50,180,000	\$49,940,000	\$324,840,000
Proprietor Income	\$36,080,000	\$20,160,000	\$10,600,000	\$66,840,000
Other Property Type Income	\$70,920,000	\$54,690,000	\$43,960,000	\$169,570,000
State & Local Taxes <sup>^</sup>	—	—	—	\$57,950,000

**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 Output** 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 (2014 \$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.

**Montana Counties - 2014 Nonresident Economic Impacts**

**Beaverhead County - 13**

**Carbon County - 14**

**Cascade County - 15**

**Custer County - 16**

**Dawson County - 17**

**Flathead County - 18**

**Gallatin County - 19**

**Glacier County - 20**

**Lewis and Clark County - 21**

**Lincoln County - 22**

**Madison County - 23**

**Missoula County - 24**

**Park County - 25**

**Richland County - 26**

**Silver Bow County - 27**

**Toole County - 28**

**Yellowstone County - 29**

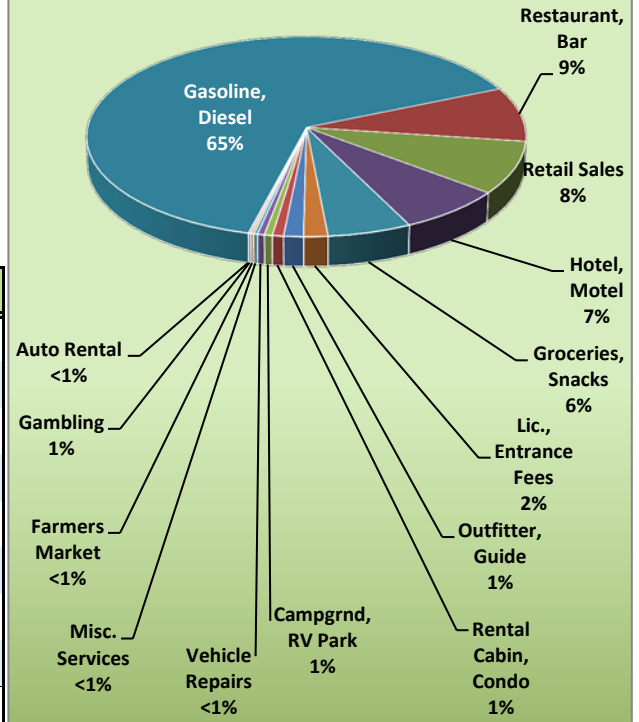
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Beaverhead County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Beaverhead County



**2014 Nonresident Expenditure Percentages in Beaverhead County**



**Table 1 - Total Nonresident Spending in Beaverhead County\*<sup>0</sup>**

Gasoline, Diesel	\$43,230,000	Rental Cabin, Condo	\$500,000
Restaurant, Bar	\$5,910,000	Campground, RV Park	\$360,000
Retail Sales	\$5,670,000	Vehicle Repairs	\$310,000
Hotel, Motel	\$4,840,000	Misc. Services	\$170,000
Groceries, Snacks	\$3,800,000	Farmers Market	\$120,000
Lic., Entrance Fees	\$1,090,000	Gambling	\$120,000
Outfitter, Guide	\$890,000	Auto Rental	\$8,000
Transportation Fares	<i>Insufficient Sample Size</i>		
<b>TOTAL</b>	<b>\$67,020,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Beaverhead County

- 2014 average spending\* in Beaverhead County by nonresident visitors to Montana totaled \$67.0 million.
- This \$67.0 million in local spending directly supports \$31.4 million of economic activity in the region, and supports an additional \$12.7 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$44.2 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$31,430,000	\$7,000,000	\$5,720,000	\$44,150,000
Employment (# of jobs)	480	50	50	580
Employee Compensation	\$9,350,000	\$1,180,000	\$1,260,000	\$11,790,000
Proprietor Income	\$1,260,000	\$370,000	\$260,000	\$1,890,000
Other Property Type Income	\$3,840,000	\$1,820,000	\$1,370,000	\$7,030,000
State & Local Taxes <sup>^</sup>	—	—	—	\$2,670,000

**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 Output** 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 (2014 \$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.

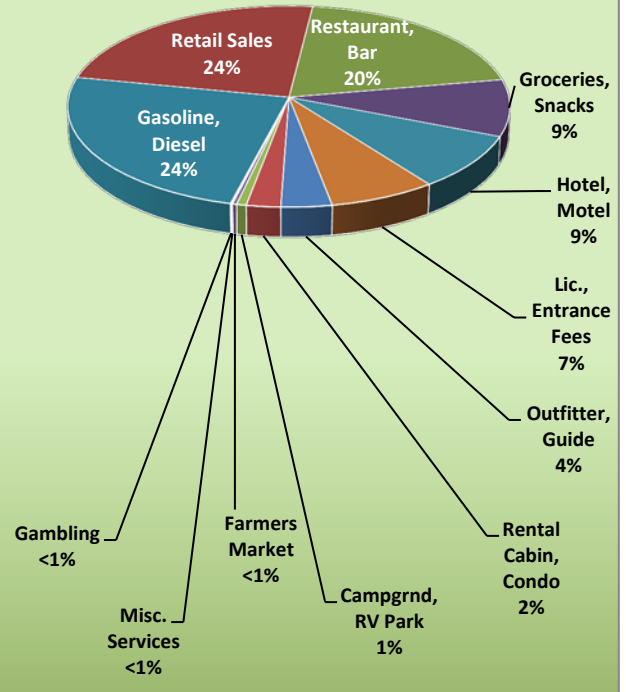
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Carbon County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Carbon County



**2014 Nonresident Expenditure Percentages in Carbon County**



**Table 1 - Total Nonresident Spending in Carbon County\*<sup>0</sup>**

Gasoline, Diesel	\$15,110,000	Rental Cabin, Condo	\$1,420,000
Retail Sales	\$14,670,000	Campground, RV Park	\$400,000
Restaurant, Bar	\$12,570,000	Farmers Market	\$170,000
Groceries, Snacks	\$5,640,000	Misc. Services	\$50,000
Hotel, Motel	\$5,420,000	Gambling	\$40,000
Lic., Entrance Fees	\$4,450,000	Auto Rental	<i>Insufficient Sample Size</i>
Outfitter, Guide	\$2,110,000	Vehicle Repairs	<i>Insufficient Sample Size</i>
		Transportation Fares	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$62,050,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Carbon County

- 2014 average spending\* in Carbon County by nonresident visitors to Montana totaled \$62.1 million.
- This \$62.1 million in local spending directly supports \$37.8 million of economic activity in the region, and supports an additional \$15.0 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$52.8 million.

Table 2 - 2014 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$37,760,000	\$9,190,000	\$5,840,000	\$52,790,000
Employment (# of jobs)	640	80	50	770
Employee Compensation	\$11,540,000	\$1,220,000	\$1,000,000	\$13,760,000
Proprietor Income	\$2,040,000	\$470,000	\$280,000	\$2,790,000
Other Property Type Income	\$4,600,000	\$2,670,000	\$1,640,000	\$8,910,000
State & Local Taxes <sup>^</sup>	—	—	—	\$2,470,000

**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 Output** 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.

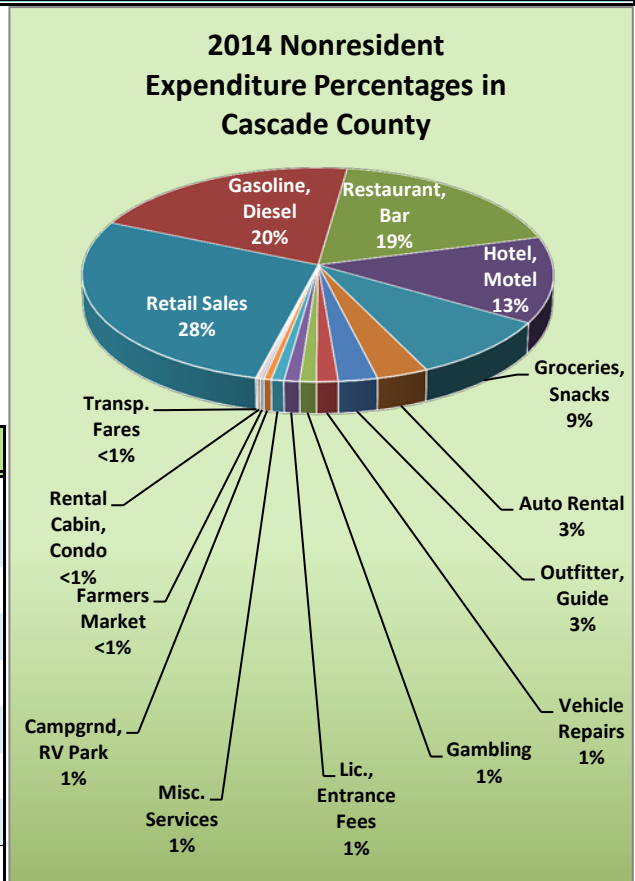
\*Data is collected at the state level. The two-year average of expenditures (2014 \$s) was used to help account for small and varying sample sizes at the county level.

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

# 2014 Nonresident Traveler Expenditures & Economic Contribution in Cascade County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Cascade County



**Table 1 - Total Nonresident Spending in Cascade County\*<sup>0</sup>**

Retail Sales	\$73,530,000	Vehicle Repairs	\$3,580,000
Gasoline, Diesel	\$53,920,000	Gambling	\$2,740,000
Restaurant, Bar	\$49,020,000	Lic., Entrance Fees	\$2,560,000
Hotel, Motel	\$34,280,000	Misc. Services	\$2,090,000
Groceries, Snacks	\$24,570,000	Campground, RV Park	\$1,270,000
Auto Rental	\$8,610,000	Farmers Market	\$520,000
Outfitter, Guide	\$6,500,000	Rental Cabin, Condo	\$470,000
		Transportation Fares	\$340,000
<b>TOTAL</b>	<b>\$264,000,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Cascade County

- 2014 average spending\* in Cascade County by nonresident visitors to Montana totaled \$264.0 million.
- This \$264.0 million in local spending directly supports \$194.1 million of economic activity in the region, and supports an additional \$115.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$309.7 million.

Table 2 - 2014 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$194,070,000	\$56,030,000	\$59,560,000	\$309,660,000
Employment (# of jobs)	2,550	420	520	3,490
Employee Compensation	\$53,410,000	\$13,490,000	\$16,020,000	\$82,920,000
Proprietor Income	\$11,120,000	\$3,050,000	\$3,250,000	\$17,420,000
Other Property Type Income	\$23,350,000	\$9,970,000	\$10,710,000	\$44,030,000
State & Local Taxes <sup>^</sup>	—	—	—	\$12,650,000

**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 Output** 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 (2014 \$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.

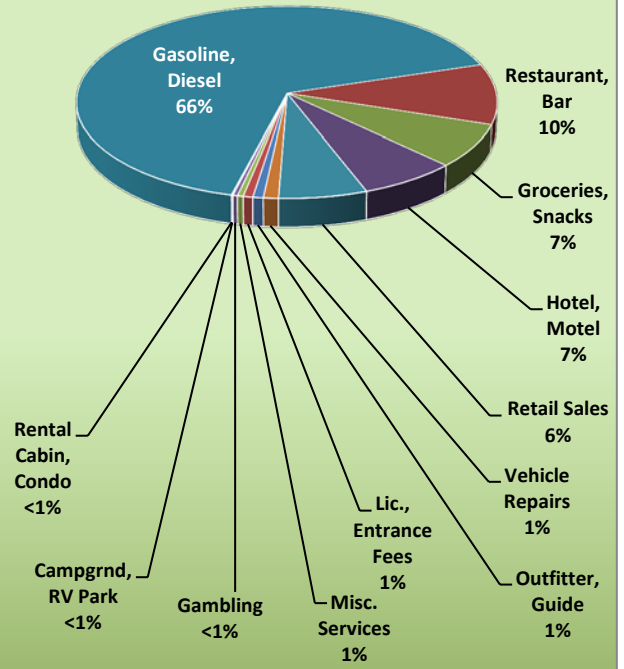
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Custer County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Custer County



### 2014 Nonresident Expenditure Percentages in Custer County



**Table 1 - Total Nonresident Spending in Custer\*<sup>0</sup>**

Gasoline, Diesel	\$72,220,000	Lic., Entrance Fees	\$730,000
Restaurant, Bar	\$11,100,000	Misc. Services	\$450,000
Groceries, Snacks	\$7,930,000	Gambling	\$350,000
Hotel, Motel	\$7,540,000	Campground, RV Park	\$90,000
Retail Sales	\$6,810,000	Rental Cabin, Condo	\$30,000
Vehicle Repairs	\$1,150,000	Farmers Market	<i>Insufficient Sample Size</i>
Outfitter, Guide	\$800,000	Auto Rental	<i>Insufficient Sample Size</i>
		Transportation Fares	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$109,200,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Custer County

- 2014 average spending\* in Custer County by nonresident visitors to Montana totaled \$109.2 million.
- This \$109.2 million in local spending directly supports \$51.3 million of economic activity in the region, and supports an additional \$24.5 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$75.9 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$51,340,000	\$11,980,000	\$12,530,000	\$75,850,000
Employment (# of jobs)	740	110	120	970
Employee Compensation	\$17,360,000	\$3,070,000	\$3,450,000	\$23,880,000
Proprietor Income	\$1,670,000	\$570,000	\$480,000	\$2,720,000
Other Property Type Income	\$5,830,000	\$2,610,000	\$2,560,000	\$11,000,000
State & Local Taxes <sup>^</sup>	—	—	—	\$4,670,000

**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 Output** 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 (2014 \$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.

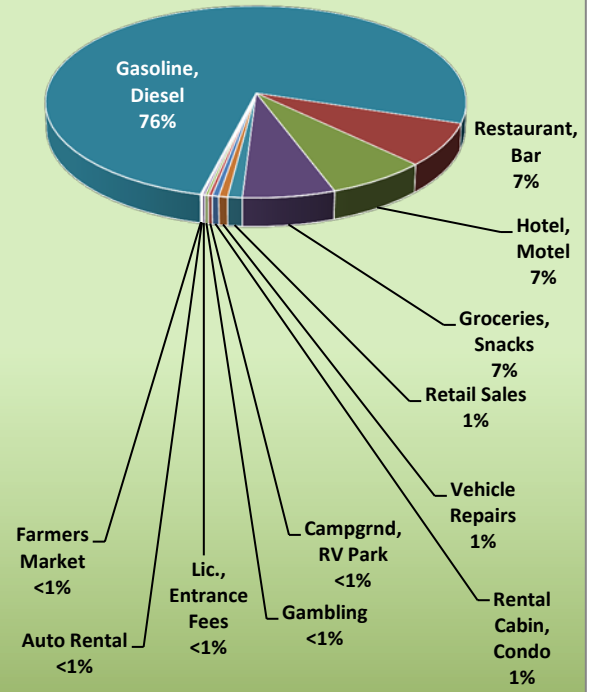
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Dawson County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Dawson County



**2014 Nonresident Expenditure Percentages in Dawson County**



**Table 1 - Total Nonresident Spending in Dawson<sup>\*,0</sup>**

Gasoline, Diesel	\$34,480,000	Campground, RV Park	\$130,000
Restaurant, Bar	\$3,330,000	Gambling	\$100,000
Hotel, Motel	\$3,190,000	Lic., Entrance Fees	\$80,000
Groceries, Snacks	\$2,950,000	Auto Rental	\$40,000
Retail Sales	\$460,000	Farmers Market	\$30,000
Vehicle Repairs	\$280,000	Outfitter, Guide	<i>Insufficient Sample Size</i>
Rental Cabin, Condo	\$210,000	Transportation Fares	<i>Insufficient Sample Size</i>
		Misc. Services	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$45,280,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Dawson County

- 2014 average spending\* in Dawson County by nonresident visitors to Montana totaled \$45.3 million.
- This \$45.3 million in local spending directly supports \$20.0 million of economic activity in the region, and supports an additional \$8.4 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$28.4 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$20,020,000	\$4,390,000	\$3,980,000	\$28,390,000
Employment (# of jobs)	270	30	40	340
Employee Compensation	\$6,800,000	\$1,050,000	\$1,030,000	\$8,880,000
Proprietor Income	\$170,000	\$110,000	\$80,000	\$360,000
Other Property Type Income	\$2,420,000	\$810,000	\$860,000	\$4,090,000
State & Local Taxes <sup>^</sup>	—	—	—	\$1,900,000

**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 Output** 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 (2014 \$s) was used to help account for small and varying sample sizes at the county level.

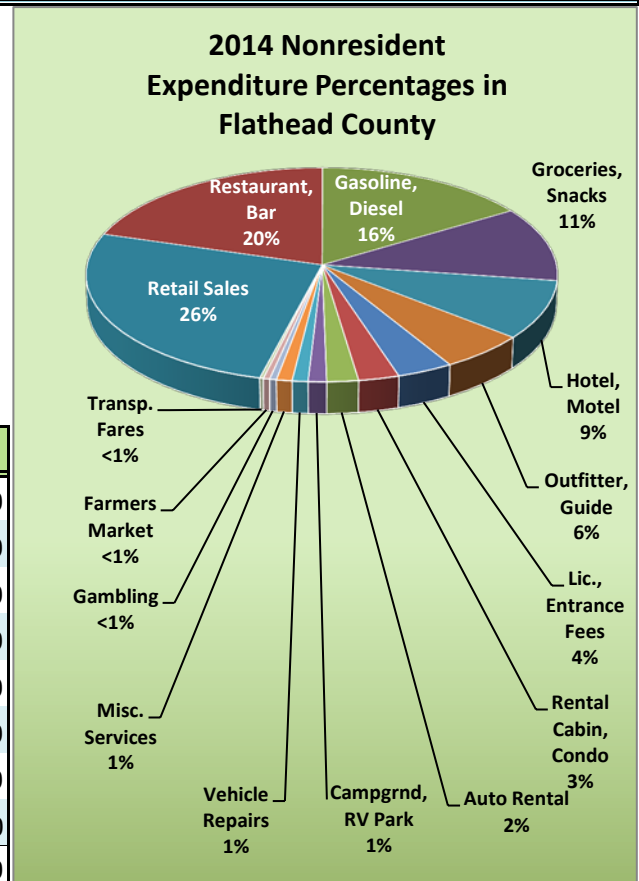
◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.



# 2014 Nonresident Traveler Expenditures & Economic Contribution in Flathead County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Flathead County



**Table 1 - Total Nonresident Spending in Flathead County\*<sup>0</sup>**

Retail Sales	\$173,160,000	Rental Cabin, Condo	\$17,120,000
Restaurant, Bar	\$135,110,000	Auto Rental	\$13,260,000
Gasoline, Diesel	\$106,820,000	Campground, RV Park	\$7,670,000
Groceries, Snacks	\$75,670,000	Vehicle Repairs	\$6,620,000
Hotel, Motel	\$58,580,000	Misc. Services	\$6,510,000
Outfitter, Guide	\$36,910,000	Gambling	\$2,870,000
Lic., Entrance Fees	\$23,640,000	Farmers Market	\$2,690,000
		Transportation Fares	\$1,510,000
<b>TOTAL</b>		<b>\$668,140,000</b>	

## 2014 Contribution of Nonresident Traveler Expenditures in Flathead County

- 2014 average spending\* in Flathead County by nonresident visitors to Montana totaled \$668.1 million.
- This \$668.1 million in local spending directly supports \$489.6 million of economic activity in the region, and supports an additional \$319.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$809.5 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$489,640,000	\$166,650,000	\$153,160,000	\$809,450,000
Employment (# of jobs)	6,840	1,300	1,380	9,520
Employee Compensation	\$154,290,000	\$29,400,000	\$40,610,000	\$224,300,000
Proprietor Income	\$25,330,000	\$13,580,000	\$9,630,000	\$48,540,000
Other Property Type Income	\$49,310,000	\$36,630,000	\$31,440,000	\$117,380,000
State & Local Taxes <sup>^</sup>	—	—	—	\$35,850,000

**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 Output** 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 (2014 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.

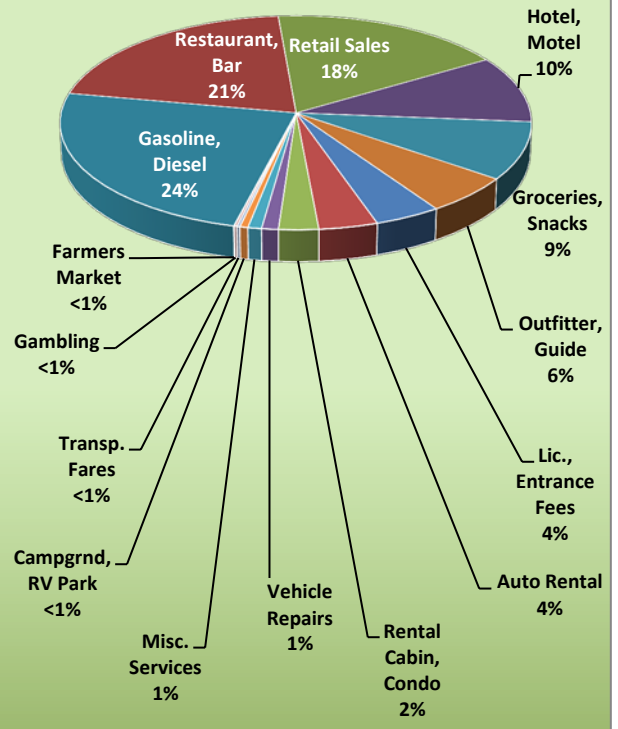
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Gallatin County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Gallatin County



**2014 Nonresident Expenditure Percentages in Gallatin County**



**Table 1 - Total Nonresident Spending in Gallatin County\*<sup>0</sup>**

Gasoline, Diesel	\$159,660,000	Auto Rental	\$24,560,000
Restaurant, Bar	\$136,880,000	Rental Cabin, Condo	\$16,580,000
Retail Sales	\$116,000,000	Vehicle Repairs	\$6,920,000
Hotel, Motel	\$67,090,000	Misc. Services	\$5,640,000
Groceries, Snacks	\$57,620,000	Campground, RV Park	\$3,300,000
Outfitter, Guide	\$37,560,000	Transportation Fares	\$1,290,000
Lic., Entrance Fees	\$27,730,000	Gambling	\$1,140,000
		Farmers Market	\$220,000
		<b>TOTAL</b>	<b>\$662,190,000</b>

## 2014 Contribution of Nonresident Traveler Expenditures in Gallatin County

- 2014 average spending\* in Gallatin County by nonresident visitors to Montana totaled \$662.2 million.
- This \$662.2 million in local spending directly supports \$527.5 million of economic activity in the region, and supports an additional \$347.4 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$874.9 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$527,490,000	\$196,260,000	\$151,170,000	\$874,920,000
Employment (# of jobs)	6,740	1,470	1,360	9,570
Employee Compensation	\$159,330,000	\$35,780,000	\$39,560,000	\$234,670,000
Proprietor Income	\$24,230,000	\$11,820,000	\$8,050,000	\$44,100,000
Other Property Type Income	\$50,320,000	\$40,370,000	\$31,690,000	\$122,380,000
State & Local Taxes <sup>^</sup>	—	—	—	\$41,710,000

**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 Output** 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.

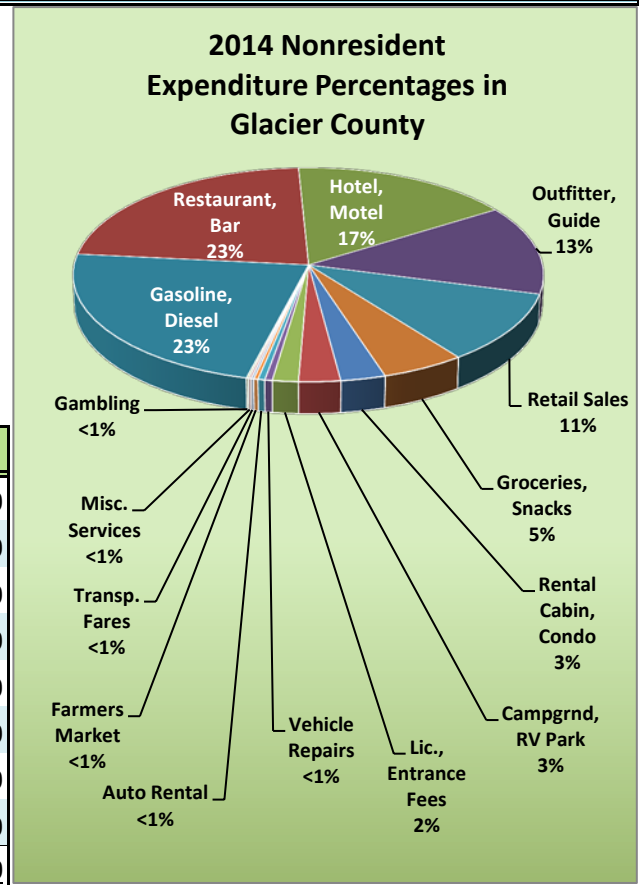
\*Data is collected at the state level. The two-year average of expenditures (2014 \$s) was used to help account for small and varying sample sizes at the county level.

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

# 2014 Nonresident Traveler Expenditures & Economic Contribution in Glacier County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Glacier County



**Table 1 - Total Nonresident Spending in Glacier County\*<sup>0</sup>**

Gasoline, Diesel	\$19,470,000	Campground, RV Park	\$2,250,000
Restaurant, Bar	\$19,350,000	Lic., Entrance Fees	\$1,390,000
Hotel, Motel	\$14,180,000	Vehicle Repairs	\$400,000
Outfitter, Guide	\$11,570,000	Auto Rental	\$370,000
Retail Sales	\$9,040,000	Farmers Market	\$220,000
Groceries, Snacks	\$4,510,000	Transportation Fares	\$150,000
Rental Cabin, Condo	\$2,420,000	Misc. Services	\$140,000
		Gambling	\$120,000
		<b>TOTAL</b>	<b>\$85,580,000</b>

## 2014 Contribution of Nonresident Traveler Expenditures in Glacier County

- 2014 average spending\* in Glacier County by nonresident visitors to Montana totaled \$85.6 million.
- This \$85.6 million in local spending directly supports \$62.3 million of economic activity in the region, and supports an additional \$17.4 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$79.6 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$62,260,000	\$7,310,000	\$10,060,000	\$79,630,000
Employment (# of jobs)	960	60	90	1,110
Employee Compensation	\$23,630,000	\$1,610,000	\$2,170,000	\$27,410,000
Proprietor Income	\$2,900,000	\$390,000	\$560,000	\$3,850,000
Other Property Type Income	\$6,570,000	\$730,000	\$2,030,000	\$9,330,000
State & Local Taxes <sup>^</sup>	—	—	—	\$3,990,000

**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 Output** 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 (2014 \$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.

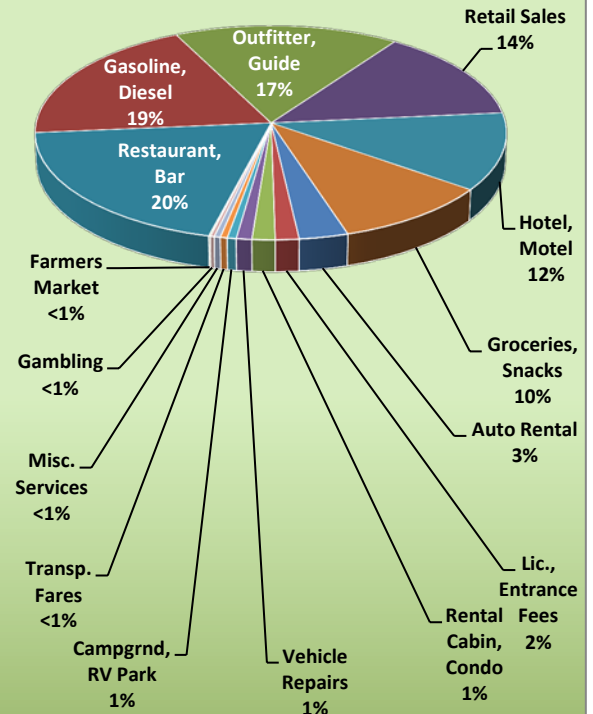
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Lewis and Clark County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Lewis and Clark



**2014 Nonresident Expenditure Percentages in Lewis and Clark County**



**Table 1 - Total Nonresident Spending in Lewis and Clark County\*<sup>0</sup>**

Restaurant, Bar	\$23,010,000	Lic., Entrance Fees	\$1,740,000
Gasoline, Diesel	\$22,530,000	Rental Cabin, Condo	\$1,690,000
Outfitter, Guide	\$19,650,000	Vehicle Repairs	\$1,130,000
Retail Sales	\$16,250,000	Campground, RV Park	\$660,000
Hotel, Motel	\$13,660,000	Transportation Fares	\$510,000
Groceries, Snacks	\$11,740,000	Misc. Services	\$450,000
Auto Rental	\$3,610,000	Gambling	\$280,000
		Farmers Market	\$130,000
<b>TOTAL</b>	<b>\$117,040,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Lewis and Clark County

- 2014 average spending\* in Lewis & Clark County by nonresident visitors to Montana totaled \$117.0 million.
- This \$117.0 million in local spending directly supports \$93.2 million of economic activity in the region, and supports an additional \$59.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$152.8 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$93,190,000	\$30,530,000	\$29,100,000	\$152,820,000
Employment (# of jobs)	1,400	290	260	1,950
Employee Compensation	\$30,590,000	\$7,870,000	\$8,320,000	\$46,780,000
Proprietor Income	\$2,320,000	\$1,240,000	\$1,070,000	\$4,630,000
Other Property Type Income	\$9,880,000	\$5,770,000	\$5,530,000	\$21,180,000
State & Local Taxes <sup>^</sup>	—	—	—	\$6,400,000

**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 Output** 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.

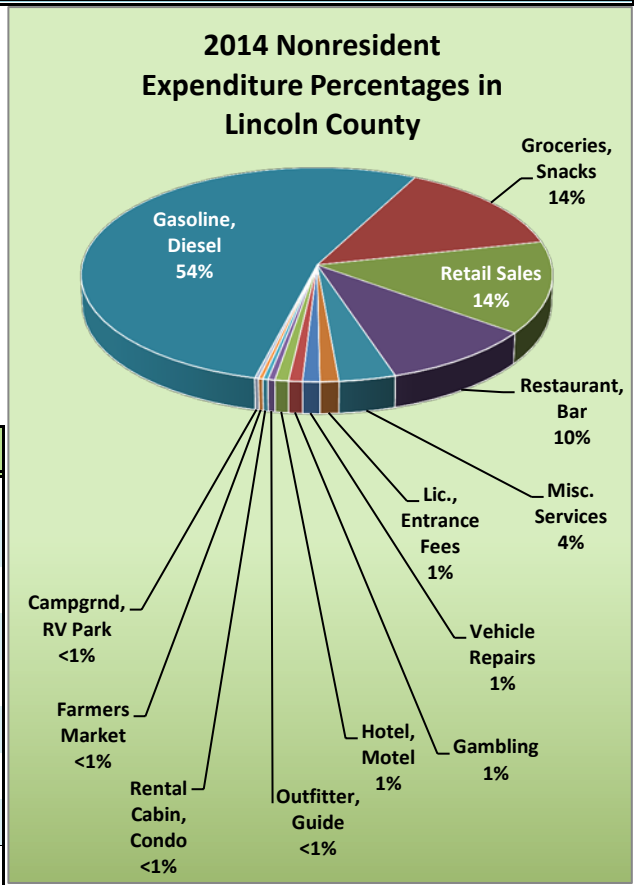
\*Data is collected at the state level. The two-year average of expenditures (2014 \$s) was used to help account for small and varying sample sizes at the county level.

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

# 2014 Nonresident Traveler Expenditures & Economic Contribution in Lincoln County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Lincoln



**Table 1 - Total Nonresident Spending in Lincoln County\*,0**

Gasoline, Diesel	\$48,430,000	Gambling	\$780,000
Groceries, Snacks	\$12,640,000	Hotel, Motel	\$770,000
Retail Sales	\$12,570,000	Outfitter, Guide	\$390,000
Restaurant, Bar	\$8,790,000	Rental Cabin, Condo	\$290,000
Misc. Services	\$3,230,000	Farmers Market	\$250,000
Lic., Entrance Fees	\$1,070,000	Campground, RV Park	\$220,000
Vehicle Repairs	\$970,000	Auto Rental	<i>Insufficient Sample Size</i>
		Transportation Fares	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$90,400,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Lincoln County

- 2014 average spending\* in Lincoln County by nonresident visitors to Montana totaled \$90.4 million.
- This \$90.4 million in local spending directly supports \$41.0 million of economic activity in the region, and supports an additional \$19.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$60.7 million.

Table 2 - 2014 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$40,950,000	\$10,800,000	\$8,960,000	\$60,710,000
Employment (# of jobs)	620	80	80	780
Employee Compensation	\$10,690,000	\$1,400,000	\$1,890,000	\$13,980,000
Proprietor Income	\$4,740,000	\$490,000	\$360,000	\$5,590,000
Other Property Type Income	\$4,650,000	\$3,480,000	\$2,240,000	\$10,370,000
State & Local Taxes^	—	—	—	\$3,420,000

**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 Output** 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.

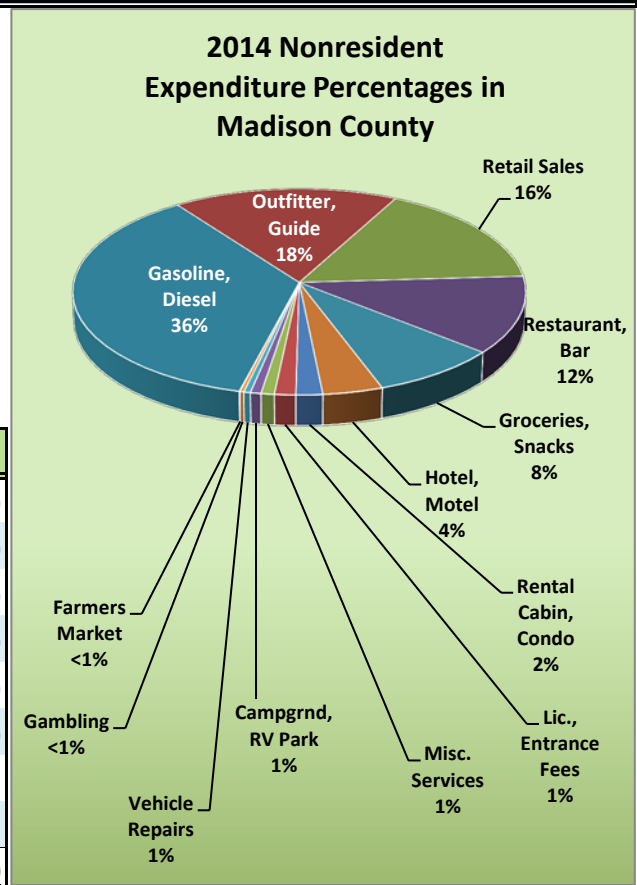
\*Data is collected at the state level. The two-year average of expenditures (2014 \$s) was used to help account for small and varying sample sizes at the county level.

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

# 2014 Nonresident Traveler Expenditures & Economic Contribution in Madison County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Madison County



**Table 1 - Total Nonresident Spending in Madison County\*<sup>0</sup>**

Gasoline, Diesel	\$21,680,000	Lic., Entrance Fees	\$830,000
Outfitter, Guide	\$10,450,000	Misc. Services	\$520,000
Retail Sales	\$9,810,000	Campground, RV Park	\$410,000
Restaurant, Bar	\$7,230,000	Vehicle Repairs	\$260,000
Groceries, Snacks	\$5,030,000	Gambling	\$160,000
Hotel, Motel	\$2,350,000	Farmers Market	\$20,000
Rental Cabin, Condo	\$1,040,000	Auto Rental	<i>Insufficient Sample Size</i>
		Transportation Fares	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$59,790,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Madison County

- 2014 average spending\* in Madison County by nonresident visitors to Montana totaled \$59.8 million.
- This \$59.8 million in local spending directly supports \$34.5 million of economic activity in the region, and supports an additional \$12.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$47.3 million.

Table 2 - 2014 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$34,500,000	\$6,520,000	\$6,240,000	\$47,260,000
Employment (# of jobs)	460	60	50	570
Employee Compensation	\$14,970,000	\$960,000	\$1,100,000	\$17,030,000
Proprietor Income	\$1,800,000	\$570,000	\$360,000	\$2,730,000
Other Property Type Income	\$3,100,000	\$1,830,000	\$1,710,000	\$6,640,000
State & Local Taxes <sup>^</sup>	—	—	—	\$2,270,000

**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 Output** 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 (2014 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.

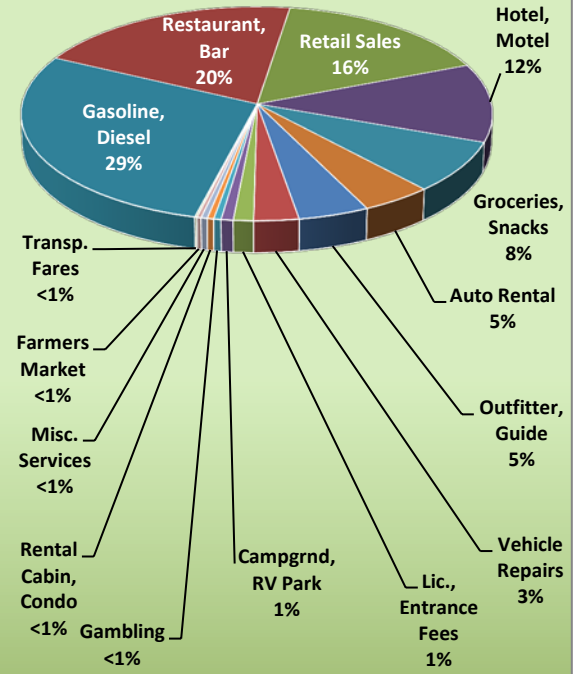
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Missoula County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Missoula County



**2014 Nonresident Expenditure Percentages in Missoula County**



**Table 1 - Total Nonresident Spending in Missoula County\*<sup>0</sup>**

Gasoline, Diesel	\$81,330,000	Vehicle Repairs	\$8,050,000
Restaurant, Bar	\$57,070,000	Lic., Entrance Fees	\$3,600,000
Retail Sales	\$46,780,000	Campground, RV Park	\$2,150,000
Hotel, Motel	\$33,770,000	Gambling	\$1,310,000
Groceries, Snacks	\$22,080,000	Rental Cabin, Condo	\$1,160,000
Auto Rental	\$12,740,000	Misc. Services	\$1,110,000
Outfitter, Guide	\$12,720,000	Farmers Market	\$760,000
		Transportation Fares	\$390,000
<b>TOTAL</b>	<b>\$285,020,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Missoula County

- 2014 average spending\* in Missoula County by nonresident visitors to Montana totaled \$285.0 million.
- This \$285.0 million in local spending directly supports \$229.0 million of economic activity in the region, and supports an additional \$160.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$389.9 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$228,980,000	\$83,550,000	\$77,330,000	\$389,860,000
Employment (# of jobs)	2,820	630	700	4,150
Employee Compensation	\$62,100,000	\$18,040,000	\$22,260,000	\$102,400,000
Proprietor Income	\$13,910,000	\$4,170,000	\$3,540,000	\$21,620,000
Other Property Type Income	\$21,280,000	\$15,790,000	\$14,880,000	\$51,950,000
State & Local Taxes <sup>^</sup>	—	—	—	\$18,300,000

**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 Output** 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.

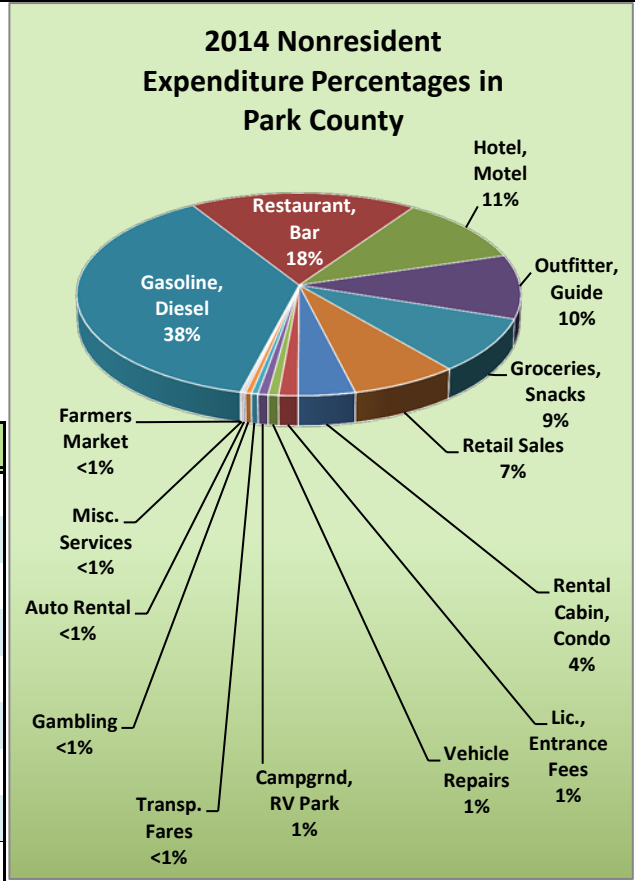
\*Data is collected at the state level. The two-year average of expenditures (2014 \$s) was used to help account for small and varying sample sizes at the county level.

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

# 2014 Nonresident Traveler Expenditures & Economic Contribution in Park County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Park County



**Table 1 - Total Nonresident Spending in Park\*<sup>o</sup>**

Gasoline, Diesel	\$73,430,000	Lic., Entrance Fees	\$2,500,000
Restaurant, Bar	\$35,320,000	Vehicle Repairs	\$1,370,000
Hotel, Motel	\$21,140,000	Campground, RV Park	\$1,300,000
Outfitter, Guide	\$19,970,000	Transportation Fares	\$860,000
Groceries, Snacks	\$17,270,000	Gambling	\$810,000
Retail Sales	\$14,000,000	Auto Rental	\$320,000
Rental Cabin, Condo	\$7,460,000	Misc. Services	\$270,000
		Farmers Market	\$60,000
<b>TOTAL</b>		<b>\$196,080,000</b>	

## 2014 Contribution of Nonresident Traveler Expenditures in Park County

- 2014 average spending\* in Park County by nonresident visitors to Montana totaled \$196.1 million.
- This \$196.1 million in local spending directly supports \$124.1 million of economic activity in the region, and supports an additional \$45.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$169.9 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$124,100,000	\$24,250,000	\$21,590,000	\$169,940,000
Employment (# of jobs)	1,970	230	210	2,410
Employee Compensation	\$45,240,000	\$4,780,000	\$5,040,000	\$55,060,000
Proprietor Income	\$3,790,000	\$1,240,000	\$820,000	\$5,850,000
Other Property Type Income	\$13,480,000	\$6,310,000	\$5,550,000	\$25,340,000
State & Local Taxes <sup>^</sup>	—	—	—	\$8,450,000

**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 Output** 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 (2014 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>o</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.



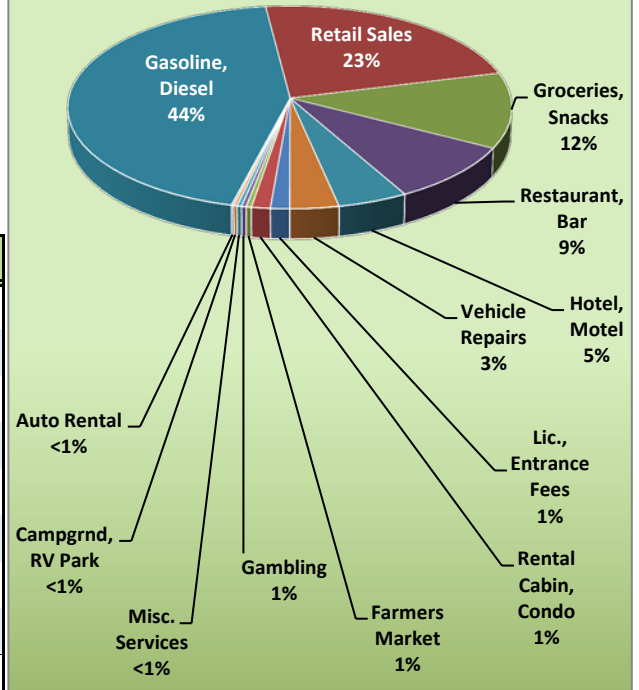
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Richland County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Richland County



**2014 Nonresident Expenditure Percentages in Richland County**



**Table 1 - Total Nonresident Spending in Richland<sup>\*,0</sup>**

Gasoline, Diesel	\$36,130,000	Rental Cabin, Condo	\$1,020,000
Retail Sales	\$18,670,000	Farmers Market	\$290,000
Groceries, Snacks	\$9,830,000	Gambling	\$250,000
Restaurant, Bar	\$7,480,000	Misc. Services	\$250,000
Hotel, Motel	\$3,830,000	Campground, RV Park	\$180,000
Vehicle Repairs	\$2,660,000	Auto Rental	\$130,000
Lic., Entrance Fees	\$1,050,000	Outfitter, Guide	<i>Insufficient Sample Size</i>
		Transportation Fares	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$81,770,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Richland County

- 2014 average spending\* in Richland County by nonresident visitors to Montana totaled \$81.8 million.
- This \$81.8 million in local spending directly supports \$39.1 million of economic activity in the region, and supports an additional \$15.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$54.9 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$39,080,000	\$7,890,000	\$7,910,000	\$54,880,000
Employment (# of jobs)	500	50	60	610
Employee Compensation	\$15,740,000	\$2,100,000	\$2,160,000	\$20,000,000
Proprietor Income	\$2,620,000	\$250,000	\$270,000	\$3,140,000
Other Property Type Income	\$3,780,000	\$1,620,000	\$1,610,000	\$7,010,000
State & Local Taxes <sup>^</sup>	—	—	—	\$2,940,000

**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 Output** 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 (2014 \$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.

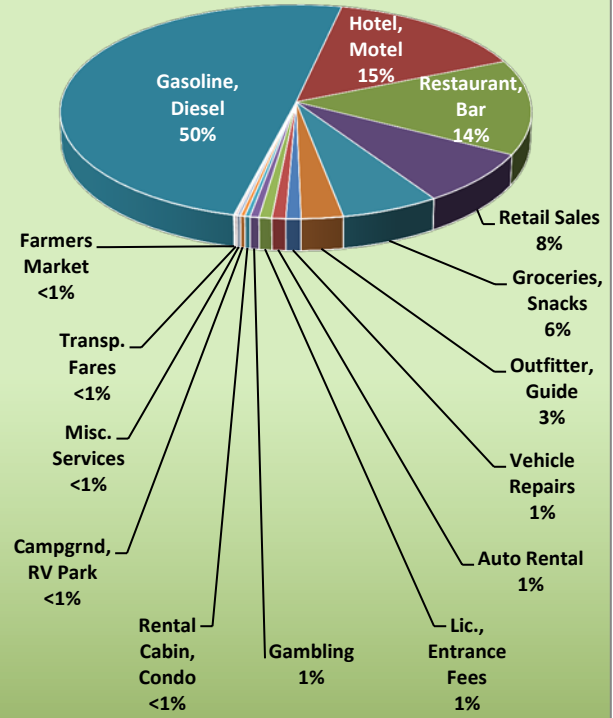
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Silver Bow County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Silver Bow County



**2014 Nonresident Expenditure Percentages in Silver Bow County**



**Table 1 - Total Nonresident Spending in Silver Bow County\*<sup>0</sup>**

Gasoline, Diesel	\$54,190,000	Auto Rental	\$950,000
Hotel, Motel	\$16,560,000	Lic., Entrance Fees	\$870,000
Restaurant, Bar	\$15,730,000	Gambling	\$610,000
Retail Sales	\$8,720,000	Rental Cabin, Condo	\$360,000
Groceries, Snacks	\$6,760,000	Campground, RV Park	\$310,000
Outfitter, Guide	\$2,890,000	Misc. Services	\$230,000
Vehicle Repairs	\$1,030,000	Transportation Fares	\$140,000
		Farmers Market	\$90,000
<b>TOTAL</b>		<b>\$109,440,000</b>	

## 2014 Contribution of Nonresident Traveler Expenditures in Silver Bow County

- 2014 average spending\* in Silver Bow County by nonresident visitors to Montana totaled \$109.4 million.
- This \$109.4 million in local spending directly supports \$62.7 million of economic activity in the region, and supports an additional \$34.0 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$96.8 million.

Table 2 - 2014 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$62,720,000	\$16,470,000	\$17,560,000	\$96,750,000
Employment (# of jobs)	830	130	160	1,120
Employee Compensation	\$17,630,000	\$4,240,000	\$4,670,000	\$26,540,000
Proprietor Income	\$9,110,000	\$930,000	\$1,110,000	\$11,150,000
Other Property Type Income	\$6,950,000	\$2,800,000	\$3,300,000	\$13,050,000
State & Local Taxes <sup>^</sup>	—	—	—	\$5,100,000

**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 Output** 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.

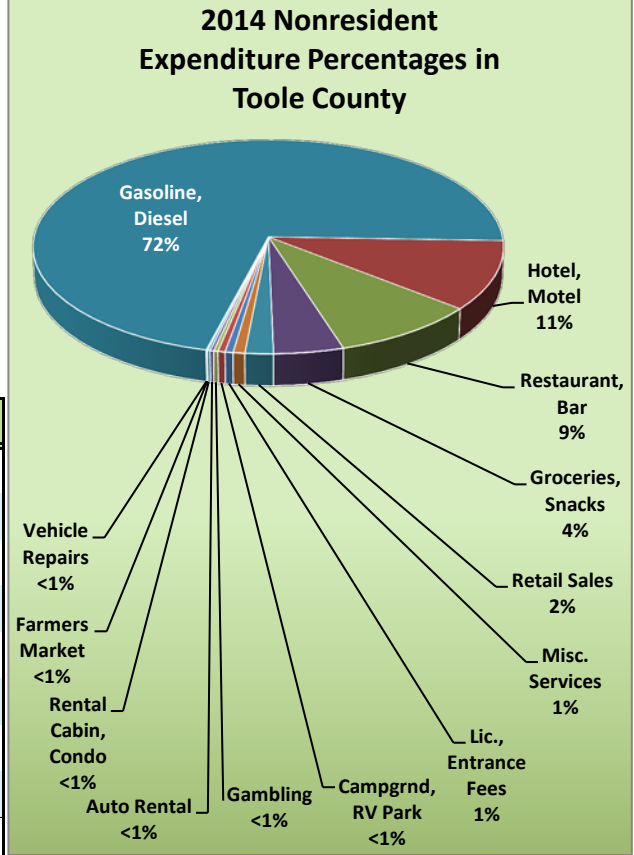
\*Data is collected at the state level. The two-year average of expenditures (2014 \$s) was used to help account for small and varying sample sizes at the county level.

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

# 2014 Nonresident Traveler Expenditures & Economic Contribution in Toole County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Toole County



**Table 1 - Total Nonresident Spending in Toole County** \*,0

Gasoline, Diesel	\$54,010,000	Campground, RV Park	\$340,000
Hotel, Motel	\$7,880,000	Gambling	\$200,000
Restaurant, Bar	\$6,990,000	Auto Rental	\$170,000
Groceries, Snacks	\$3,320,000	Rental Cabin, Condo	\$130,000
Retail Sales	\$1,340,000	Farmers Market	\$30,000
Misc. Services	\$550,000	Vehicle Repairs	\$30,000
Lic., Entrance Fees	\$380,000	Outfitter, Guide	<i>Insufficient Sample Size</i>
		Transportation Fares	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$75,370,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Toole County

- 2014 average spending\* in Toole County by nonresident visitors to Montana totaled \$75.4 million.
- This \$75.4 million in local spending directly supports \$35.4 million of economic activity in the region, and supports an additional \$10.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$46.2 million.

Table 2 - 2014 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$35,400,000	\$6,050,000	\$4,720,000	\$46,170,000
Employment (# of jobs)	460	50	40	550
Employee Compensation	\$10,340,000	\$1,380,000	\$940,000	\$12,660,000
Proprietor Income	\$3,900,000	\$400,000	\$300,000	\$4,600,000
Other Property Type Income	\$3,980,000	\$1,030,000	\$1,090,000	\$6,100,000
State & Local Taxes^	—	—	—	\$2,990,000

**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 Output** 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 (2014 \$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.

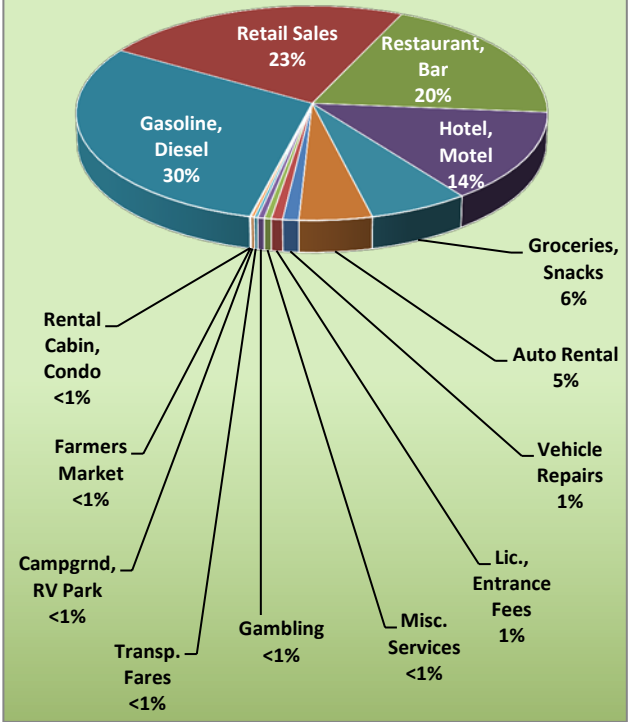
# 2014 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone County

by Kara Grau, M.S.

## 2014 Nonresident Traveler Expenditures in Yellowstone County



**2014 Nonresident Expenditure Percentages in Yellowstone County**



**Table 1 - Total Nonresident Spending in Yellowstone County\*<sup>0</sup>**

Gasoline, Diesel	\$118,480,000	Lic., Entrance Fees	\$2,820,000
Retail Sales	\$91,670,000	Misc. Services	\$1,750,000
Restaurant, Bar	\$77,600,000	Gambling	\$1,630,000
Hotel, Motel	\$54,000,000	Transportation Fares	\$870,000
Groceries, Snacks	\$25,060,000	Campground, RV Park	\$800,000
Auto Rental	\$18,230,000	Farmers Market	\$230,000
Vehicle Repairs	\$3,990,000	Rental Cabin, Condo	\$100,000
		Outfitter, Guide	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$397,230,000</b>		

## 2014 Contribution of Nonresident Traveler Expenditures in Yellowstone County

- 2014 average spending\* in Yellowstone by nonresident visitors to Montana totaled \$397.2 million.
- This \$397.2 million in local spending directly supports \$300.9 million of economic activity in the region, and supports an additional \$171.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$472.9 million.

**Table 2 - 2014 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$300,940,000	\$86,150,000	\$85,760,000	\$472,850,000
Employment (# of jobs)	3,540	650	730	4,920
Employee Compensation	\$85,340,000	\$23,560,000	\$25,890,000	\$134,790,000
Proprietor Income	\$6,380,000	\$3,420,000	\$3,140,000	\$12,940,000
Other Property Type Income	\$36,640,000	\$15,500,000	\$15,980,000	\$68,120,000
State & Local Taxes <sup>^</sup>	–	–	–	\$20,220,000

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

# 2014 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

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**2015**

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