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Montana Travel Regions & Counties - Economic Contribution of 2019/2021 Averaged Nonresident Travel Spending

Kara Grau

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INSTITUTE FOR TOURISM AND RECREATION RESEARCH

MONTANA TRAVEL REGIONS & COUNTIES

ECONOMIC CONTRIBUTION OF 2019/2021 AVERAGED NONRESIDENT TRAVEL SPENDING

Nonresidents now spend over \$4 billion in Montana each year. This report looks at the distribution of spending across Montana's six travel regions, as well as 15 of the 56 counties with the highest spending based on an average of 2019 and 2021 spending data.

Kara Grau

ABOUT OUR WORK

2021 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

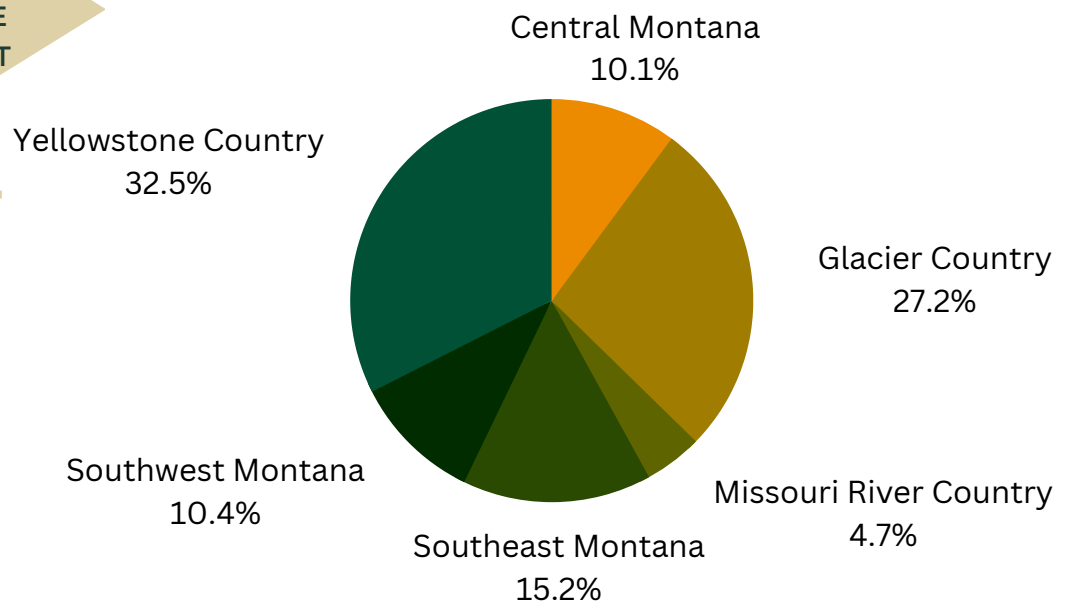
Executive Summary

Money spent by those traveling in Montana has a direct effect on businesses where spending occurs, and it ripples throughout the state's economy from there. Statewide, spending by nonresident visitors (averaged over two years - 2019 and 2021) totaled \$4.48 billion. This report details the methods and results of the economic impact analyses for each of Montana's six travel regions, as well as analyses for counties in which nonresident travelers spent approximately \$50 million or more.

\$4.48 BILLION
*2019 & 2021 AVERAGE
TOTAL SPENDING IN MT

Estimate of Nonresident Traveler Spending by Region

Yellowstone and Glacier travel regions received the highest percentage of nonresident traveler spending with 32% and 27%, respectively.



The Institute for Tourism and Recreation Research (ITRR) prepares these estimates through data collected via in-person interviews with travelers, as well as data from secondary sources. For more information about ITRR's Statewide Nonresident Traveler Survey, please refer to the document found at <http://itrr.umt.edu/files/NonresTravelSurvey-Methods-Analysis.pdf>

This study was funded by the Lodging Facility Use Tax

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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 the state 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 15 of the 56 counties in the state.

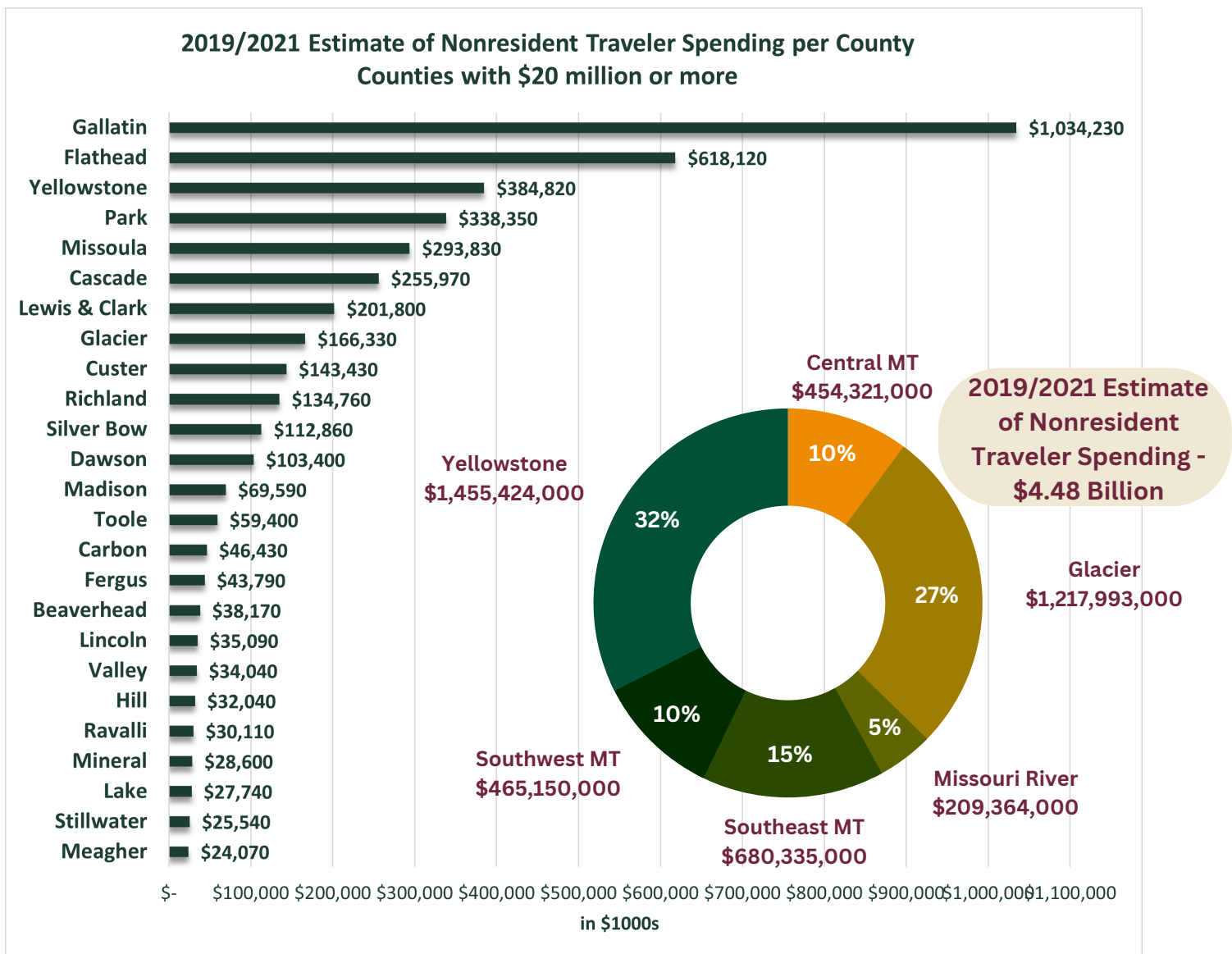
Fuel and food are typically the largest category of spending for visitors, 23% and 19% in this case, as travelers explore the state.

Expenditure Data

Nonresident spending data are 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 regional 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.

| Expenditure Category | 2019/2021 Avg. Total Nonresident Spending |
|-------------------------|---|
| Gasoline, Diesel | \$1,038,710,000 |
| Restaurant, Bar | \$856,158,000 |
| Hotel, Motel | \$583,252,000 |
| Outfitter, Guide | \$443,243,000 |
| Groceries, Snacks | \$398,513,000 |
| Retail sales | \$377,456,000 |
| Auto Rental | \$195,586,000 |
| Licenses, Entrance Fees | \$175,046,000 |
| Rental cabin, Condo | \$163,995,000 |
| Made in Montana | \$105,431,000 |
| Campground, RV Park | \$58,546,000 |
| Misc. Services | \$35,833,000 |
| Vehicle Repairs | \$28,811,000 |
| Gambling | \$14,834,000 |
| Farmers Market | \$6,127,000 |
| Transp. Fares | \$1,048,000 |
| TOTAL | \$4,482,588,000 |

The statewide total average spending for 2019 and 2021 is presented on the previous page. For the analyses highlighted in this report, the 2019 (inflation adjusted to 2021 \$s) and 2021 county spending estimates were averaged. (2020 full-year data are not available due to pandemic-related data collection interruptions.) 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. Total spending in the counties which received an estimated \$20 million or more in nonresident traveler spending is displayed below. Total spending in the six travel regions is also included.



The following pages provide estimates of spending within the various expenditure categories by nonresidents for each of the selected travel regions and counties (those in which nonresidents spent approximately \$50 million or more). 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 15 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 16 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 21 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.

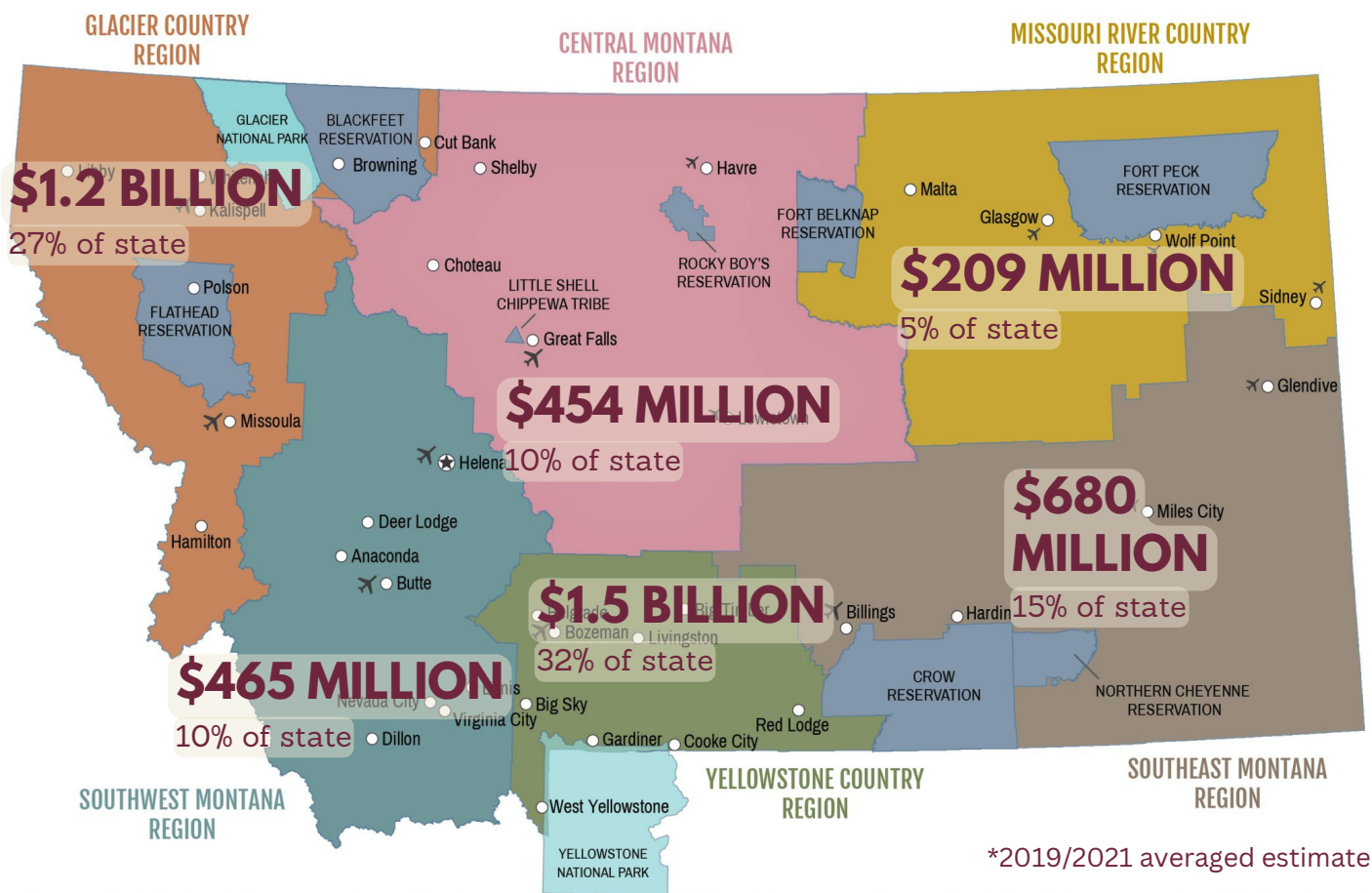


In some cases, the economic impact to industry output (the value of goods and services produced by an industry which nonresidents purchase) is a smaller sum than the total amount of spending in a county or region. This is to be expected. On a regional basis, and particularly at the county level, much 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.

Notes to the Reader

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.

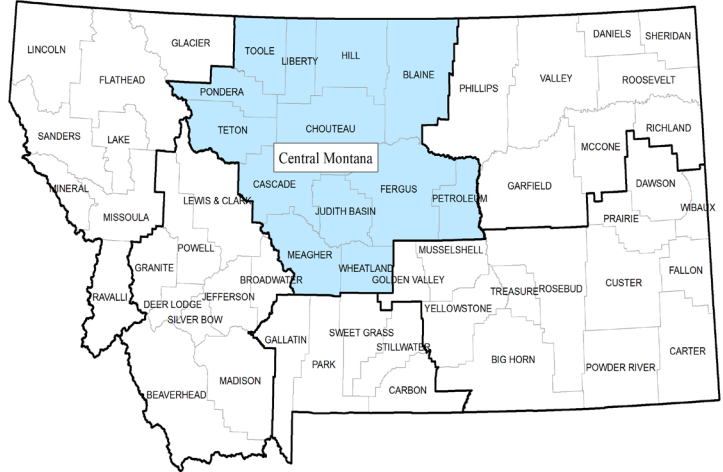
\$4.48 billion* in Montana



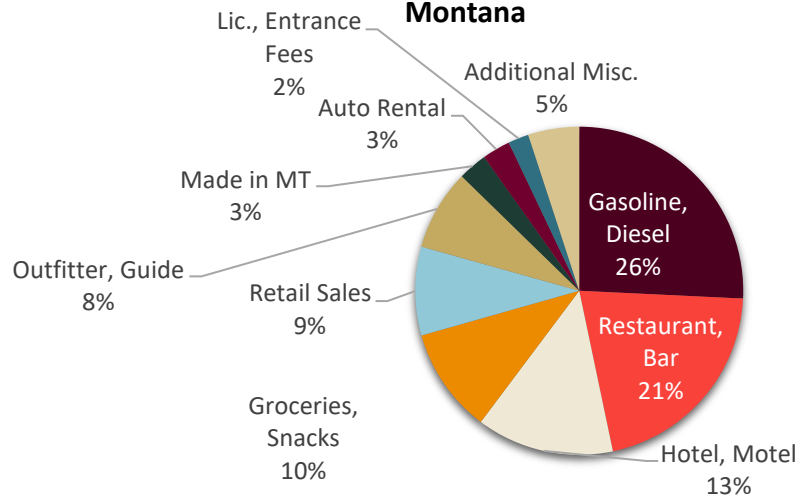
2021 Nonresident Traveler Expenditures & Economic Contribution in Central Montana Travel Region

Table 1 - Total Nonresident Spending in Central Montana*⁰

| | |
|---------------------|----------------------|
| Gasoline, Diesel | \$117,031,000 |
| Restaurant, Bar | \$95,164,000 |
| Hotel, Motel | \$61,518,000 |
| Groceries, Snacks | \$47,048,000 |
| Retail Sales | \$39,682,000 |
| Outfitter, Guide | \$36,134,000 |
| Made in MT | \$13,032,000 |
| Auto Rental | \$12,616,000 |
| Lic., Entrance Fees | \$9,221,000 |
| Rental Cabin, Condo | \$6,255,000 |
| Campgrnd, RV Park | \$5,267,000 |
| Misc. Services | \$5,239,000 |
| Vehicle Repairs | \$2,568,000 |
| Gambling | \$2,541,000 |
| Farmers Mkt | \$799,000 |
| Transp. Fares | \$206,000 |
| TOTAL | \$454,321,000 |



Percent of Nonresident Travel Spending in Central Montana



2021 Contribution of Nonresident Traveler Expenditures in Central Montana Travel Region

▪2021 estimates of spending in Central Montana by nonresident visitors to the state totaled over \$454 million.

▪This \$454 million in local spending directly supports \$396.6 million of economic activity in the region, and supports an additional \$205.5 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$602.2 million.

| Table 2 - 2022 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|---------------|--------------|---------------|
| Industry Output | \$396,620,000 | \$118,352,000 | \$87,185,000 | \$602,157,000 |
| Employment (# of jobs) | 4,070 | 707 | 632 | 5,409 |
| Employee Compensation | \$94,180,000 | \$24,390,000 | \$22,835,000 | \$141,405,000 |
| Proprietor Income | \$9,580,000 | \$5,697,000 | \$3,611,000 | \$18,888,000 |
| Other Property Type Income | \$40,844,000 | \$11,098,000 | \$15,753,000 | \$67,695,000 |
| State & Local Taxes [^] | \$15,300,000 | \$6,830,000 | \$3,887,000 | \$26,017,000 |

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.

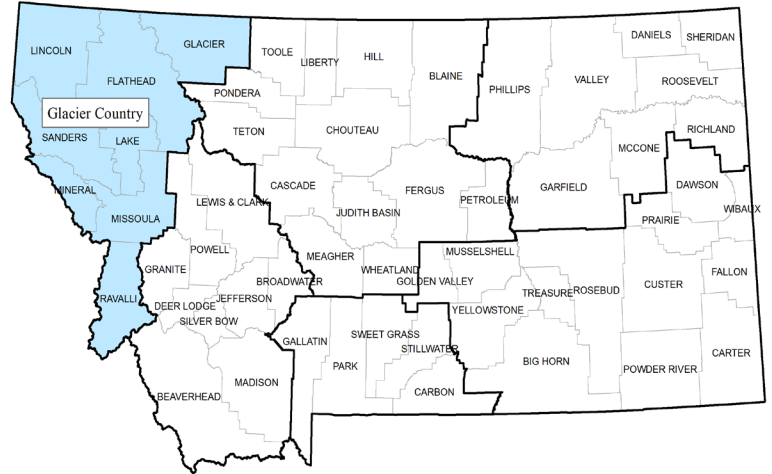
*Data is collected at the state level. In 2021, several categories had insufficient sample size for regional breakout.

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

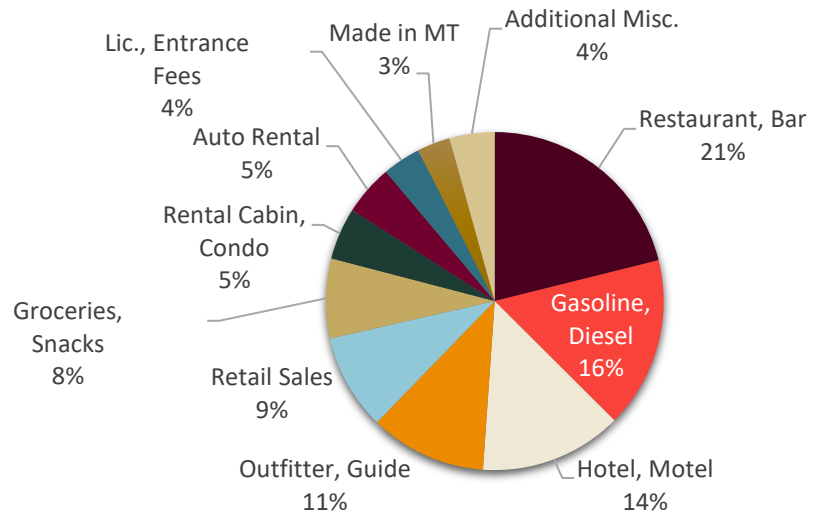
2021 Nonresident Traveler Expenditures & Economic Contribution in Glacier Country Travel Region

Table 1 - Total Nonresident Spending in Glacier Country*⁰

| | |
|---------------------|------------------------|
| Restaurant, Bar | \$257,207,000 |
| Gasoline, Diesel | \$199,166,000 |
| Hotel, Motel | \$166,146,000 |
| Outfitter, Guide | \$135,879,000 |
| Retail Sales | \$111,759,000 |
| Groceries, Snacks | \$92,848,000 |
| Rental Cabin, Condo | \$60,547,000 |
| Auto Rental | \$58,789,000 |
| Lic., Entrance Fees | \$44,518,000 |
| Made in MT | \$38,496,000 |
| Campgrnd, RV Park | \$25,723,000 |
| Misc. Services | \$10,609,000 |
| Vehicle Repairs | \$9,119,000 |
| Farmers Mkt | \$3,454,000 |
| Gambling | \$3,339,000 |
| Transp. Fares | \$394,000 |
| TOTAL | \$1,217,993,000 |



Percent of Nonresident Travel Spending in Glacier Country



2021 Contribution of Nonresident Traveler Expenditures in Glacier Country Travel Region

▪2021 estimates of spending in Glacier Country by nonresident visitors to the state totaled nearly \$1.2 billion.

▪This \$1.2 billion in local spending directly supports \$1.06 billion of economic activity in the region, and supports an additional \$834.9 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$1.9 billion.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|-----------------|---------------|---------------|-----------------|
| Industry Output | \$1,068,463,000 | \$478,415,000 | \$356,497,000 | \$1,903,375,000 |
| Employment (# of jobs) | 11,846 | 2,970 | 2,690 | 17,506 |
| Employee Compensation | \$314,841,000 | \$88,672,000 | \$94,633,000 | \$498,146,000 |
| Proprietor Income | \$40,611,000 | \$27,035,000 | \$18,593,000 | \$86,239,000 |
| Other Property Type Income | \$88,653,000 | \$42,362,000 | \$64,626,000 | \$195,641,000 |
| State & Local Taxes [^] | \$46,549,000 | \$26,654,000 | \$16,634,000 | \$89,837,000 |

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.

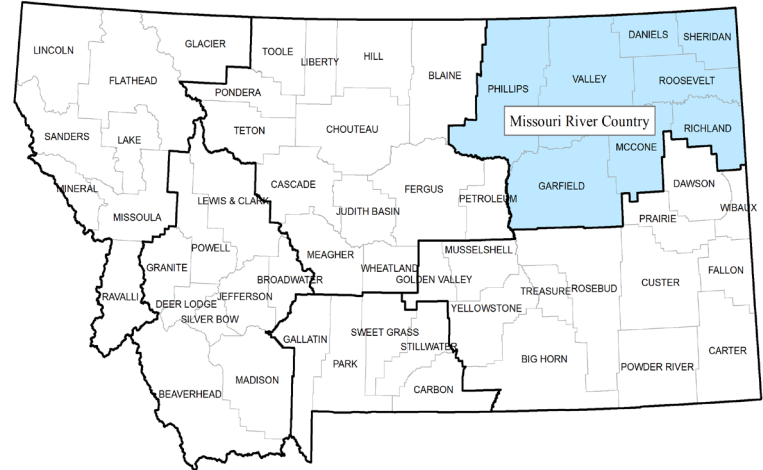
*Data is collected at the state level. In 2021, several categories had insufficient sample size for regional breakout.

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

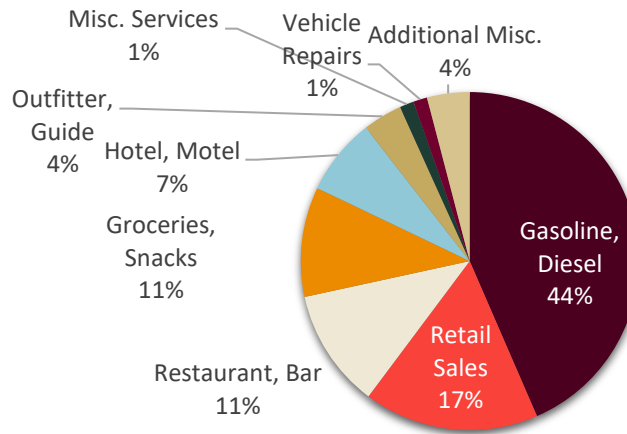
2021 Nonresident Traveler Expenditures & Economic Contribution in Missouri River Country Travel Region

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

| | |
|---------------------|---------------------------------|
| Gasoline, Diesel | \$91,038,000 |
| Retail Sales | \$35,054,000 |
| Restaurant, Bar | \$23,800,000 |
| Groceries, Snacks | \$21,991,000 |
| Hotel, Motel | \$15,442,000 |
| Outfitter, Guide | \$7,886,000 |
| Misc. Services | \$2,846,000 |
| Vehicle Repairs | \$2,779,000 |
| Campgrnd, RV Park | \$1,922,000 |
| Gambling | \$1,699,000 |
| Lic., Entrance Fees | \$1,692,000 |
| Rental Cabin, Condo | \$1,560,000 |
| Made in MT | \$1,406,000 |
| Auto Rental | \$229,000 |
| Farmers Mkt | \$20,000 |
| Transp. Fares | <i>Insufficient Sample Size</i> |
| TOTAL | \$209,364,000 |



Percent of Nonresident Travel Spending in Missouri River Country



2021 Contribution of Nonresident Traveler Expenditures in Missouri River Country Travel Region

- 2021 estimates of spending in Missouri River Country by nonresident visitors to the state totaled \$209 million.
- This \$209 million in local spending directly supports nearly \$171.7 million of economic activity in the region, and supports an additional \$93.3 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$265.0 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|---------------|--------------|---------------|
| Industry Output | \$171,697,000 | \$66,023,000 | \$27,293,000 | \$265,013,000 |
| Employment (# of jobs) | 1,162 | 340 | 194 | 1,696 |
| Employee Compensation | \$28,187,000 | \$19,281,000 | \$6,513,000 | \$53,981,000 |
| Proprietor Income | \$5,618,000 | \$5,607,000 | \$1,362,000 | \$12,587,000 |
| Other Property Type Income | \$6,311,000 | -\$34,466,000 | \$4,956,000 | -\$23,199,000 |
| State & Local Taxes [^] | \$4,414,000 | \$9,370,000 | \$1,441,000 | \$15,225,000 |

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.

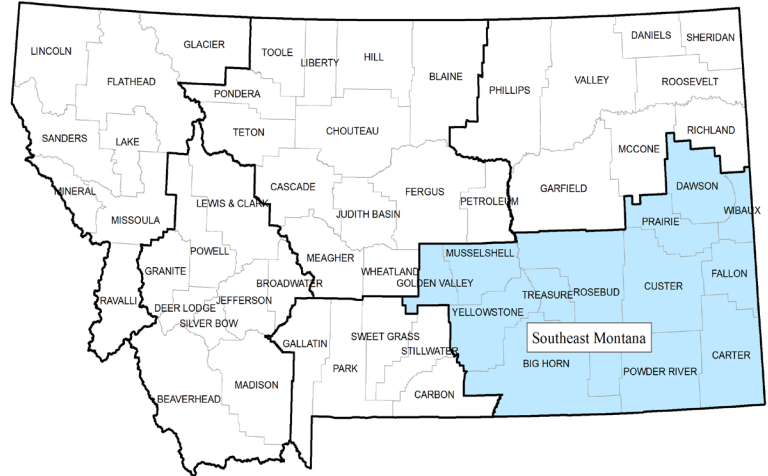
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◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

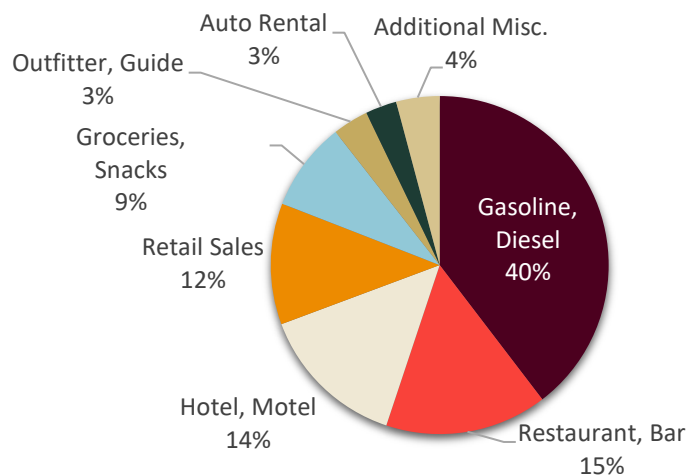
2021 Nonresident Traveler Expenditures & Economic Contribution in Southeast Montana Travel Region

Table 1 - Total Nonresident Spending in Southeast Montana*⁰

| | |
|---------------------|----------------------|
| Gasoline, Diesel | \$269,491,000 |
| Restaurant, Bar | \$105,508,000 |
| Hotel, Motel | \$96,576,000 |
| Retail Sales | \$78,886,000 |
| Groceries, Snacks | \$57,983,000 |
| Outfitter, Guide | \$23,242,000 |
| Auto Rental | \$20,383,000 |
| Made in MT | \$6,749,000 |
| Lic., Entrance Fees | \$6,135,000 |
| Campgrnd, RV Park | \$4,592,000 |
| Vehicle Repairs | \$4,028,000 |
| Gambling | \$3,351,000 |
| Misc. Services | \$2,277,000 |
| Rental Cabin, Condo | \$717,000 |
| Farmers Mkt | \$251,000 |
| Transp. Fares | \$166,000 |
| TOTAL | \$680,335,000 |



Percent of Nonresident Travel Spending in Southeast Montana



2021 Contribution of Nonresident Traveler Expenditures in Southeast Montana Travel Region

▪2021 estimates of spending in Southeast Montana by nonresident visitors to the state totaled over \$680 million.

▪This \$680 million in local spending directly supports \$593.6 million of economic activity in the region, and supports an additional \$281.6 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$875.3 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|---------------|---------------|---------------|
| Industry Output | \$593,636,000 | \$163,630,000 | \$118,017,000 | \$875,283,000 |
| Employment (# of jobs) | 4,301 | 896 | 823 | 6,020 |
| Employee Compensation | \$122,272,000 | \$36,179,000 | \$32,899,000 | \$191,350,000 |
| Proprietor Income | \$10,489,000 | \$12,617,000 | \$4,873,000 | \$27,979,000 |
| Other Property Type Income | \$72,122,000 | \$18,792,000 | \$23,555,000 | \$114,469,000 |
| State & Local Taxes [^] | \$18,116,000 | \$9,595,000 | \$5,155,000 | \$32,866,000 |

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. In 2021, several categories had insufficient sample size for regional breakout.

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

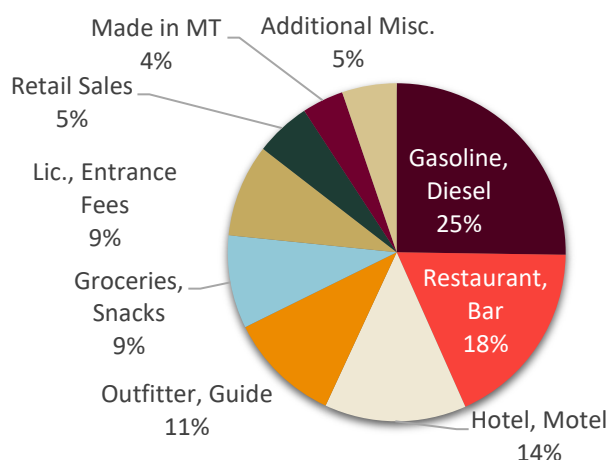
2021 Nonresident Traveler Expenditures & Economic Contribution in Southwest Montana Travel Region

Table 1 - Total Nonresident Spending in Southwest Montana*

| | |
|---------------------|----------------------|
| Gasoline, Diesel | \$117,394,000 |
| Restaurant, Bar | \$84,207,000 |
| Hotel, Motel | \$63,135,000 |
| Outfitter, Guide | \$50,158,000 |
| Groceries, Snacks | \$41,448,000 |
| Lic., Entrance Fees | \$41,250,000 |
| Retail Sales | \$24,693,000 |
| Made in MT | \$18,542,000 |
| Rental Cabin, Condo | \$7,059,000 |
| Campgrnd, RV Park | \$4,787,000 |
| Auto Rental | \$4,363,000 |
| Misc. Services | \$2,845,000 |
| Vehicle Repairs | \$2,651,000 |
| Gambling | \$1,862,000 |
| Farmers Mkt | \$523,000 |
| Transp. Fares | \$233,000 |
| TOTAL | \$465,150,000 |



Percent of Nonresident Travel Spending in Southwest Montana



2021 Contribution of Nonresident Traveler Expenditures in Southwest Montana Travel Region

▪2021 estimates of spending in Southwest Montana by nonresident visitors to the state totaled over \$465 million.

▪This \$465 million in local spending directly supports \$408.9 million of economic activity in the region, and supports an additional \$280.5 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$689.5 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|--------------------------------|---------------|---------------|---------------|---------------|
| Industry Output | \$408,972,000 | \$169,821,000 | \$110,688,000 | \$689,481,000 |
| Employment (# of jobs) | 4,208 | 855 | 809 | 5,872 |
| Employee Compensation | \$112,226,000 | \$25,670,000 | \$28,860,000 | \$166,756,000 |
| Proprietor Income | \$8,726,000 | \$27,458,000 | \$5,357,000 | \$41,541,000 |
| Other Property Type Income | \$27,591,000 | \$13,131,000 | \$20,658,000 | \$61,380,000 |
| State & Local Taxes^ | \$15,080,000 | \$9,355,000 | \$5,283,000 | \$29,718,000 |

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.

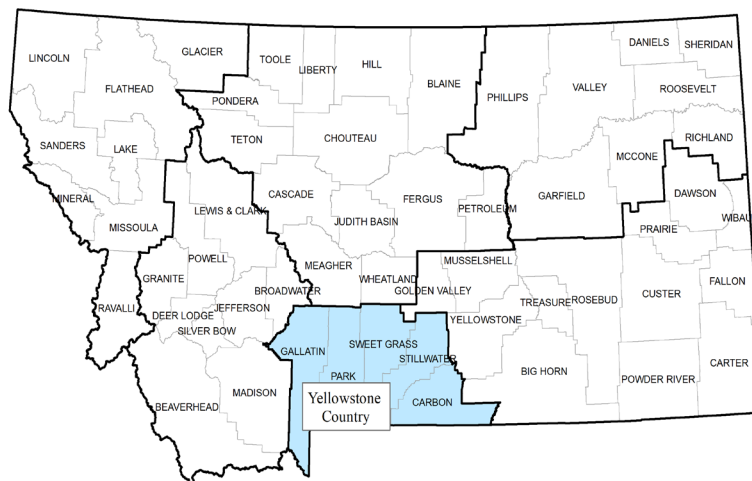
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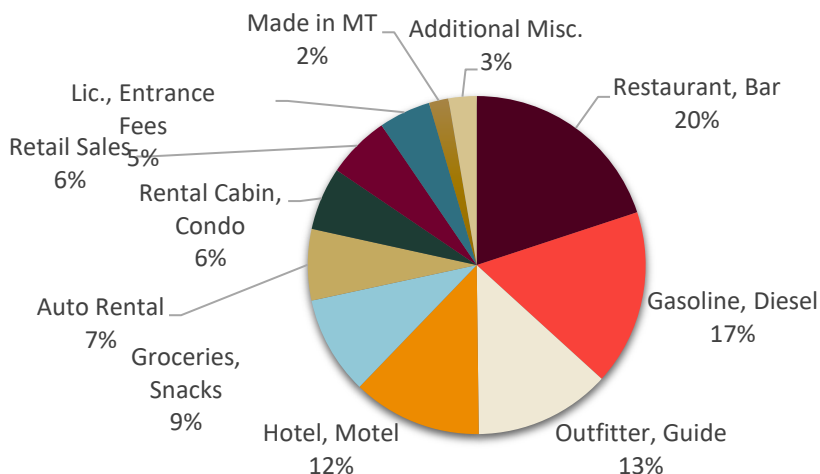
2021 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone Country Travel Region

Table 1 - Total Nonresident Spending in Yellowstone Country*⁰

| | |
|---------------------|------------------------|
| Restaurant, Bar | \$290,271,000 |
| Gasoline, Diesel | \$244,589,000 |
| Outfitter, Guide | \$189,946,000 |
| Hotel, Motel | \$180,435,000 |
| Groceries, Snacks | \$137,196,000 |
| Auto Rental | \$99,205,000 |
| Rental Cabin, Condo | \$87,858,000 |
| Retail Sales | \$87,381,000 |
| Lic., Entrance Fees | \$72,230,000 |
| Made in MT | \$27,207,000 |
| Campgrnd, RV Park | \$16,255,000 |
| Misc. Services | \$12,017,000 |
| Vehicle Repairs | \$7,666,000 |
| Gambling | \$2,041,000 |
| Farmers Mkt | \$1,079,000 |
| Transp. Fares | \$48,000 |
| TOTAL | \$1,455,424,000 |



Percent of Nonresident Travel Spending in Yellowstone Country



2021 Contribution of Nonresident Traveler Expenditures in Yellowstone Country Travel Region

▪2021 estimates of spending in Yellowstone Country by nonresident visitors to the state totaled \$1.45 billion.

▪This \$1.45 billion in local spending directly supports \$1.3 billion of economic activity in the region, and supports an additional \$861.7 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$2.1 billion.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|-----------------|---------------|---------------|-----------------|
| Industry Output | \$1,306,040,000 | \$505,830,000 | \$355,839,000 | \$2,167,709,000 |
| Employment (# of jobs) | 13,694 | 3,082 | 2,581 | 19,357 |
| Employee Compensation | \$398,817,000 | \$104,534,000 | \$94,638,000 | \$597,989,000 |
| Proprietor Income | \$65,838,000 | \$30,060,000 | \$20,156,000 | \$116,054,000 |
| Other Property Type Income | \$104,634,000 | \$42,593,000 | \$70,256,000 | \$217,483,000 |
| State & Local Taxes [^] | \$56,139,000 | \$28,950,000 | \$16,746,000 | \$101,835,000 |

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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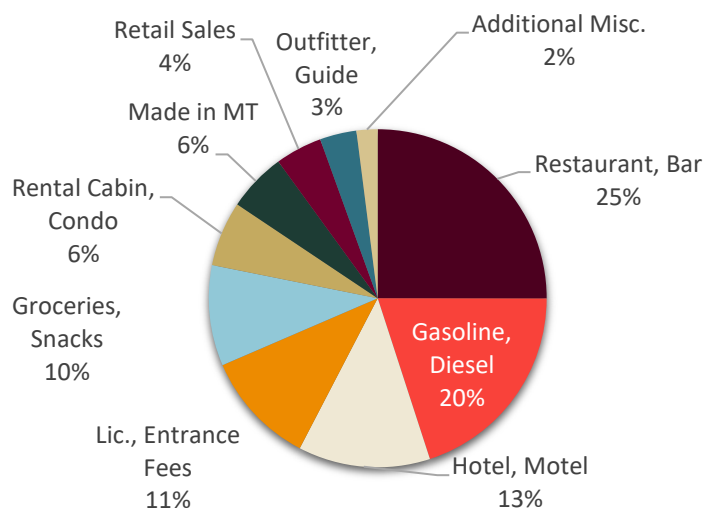
2021 Nonresident Traveler Expenditures & Economic Contribution in Carbon County

Table 1 - Total Nonresident Spending in Carbon County*⁰

| | |
|---|---------------------|
| Restaurant, Bar | \$11,619,000 |
| Gasoline, Diesel | \$9,274,000 |
| Hotel, Motel | \$5,865,000 |
| Lic., Entrance Fees | \$5,059,000 |
| Groceries, Snacks | \$4,470,000 |
| Rental Cabin, Condo | \$2,888,000 |
| Made in MT | \$2,610,000 |
| Retail Sales | \$2,080,000 |
| Outfitter, Guide | \$1,629,000 |
| Campgrnd, RV Park | \$513,000 |
| Misc. Services | \$231,000 |
| Gambling | \$132,000 |
| Farmers Mkt | \$61,000 |
| Auto Rental <i>Insufficient Sample Size</i> | |
| Vehicle Repairs <i>Insufficient Sample Size</i> | |
| Transp. Fares <i>Insufficient Sample Size</i> | |
| TOTAL | \$46,431,000 |



Percent of Nonresident Travel Spending in Carbon County



2021 Contribution of Nonresident Traveler Expenditures in Carbon County

▪2021 estimates of spending in Carbon County by nonresident visitors to the state totaled over \$46 million.

▪This \$46 million in local spending directly supports \$41.1 million of economic activity in the region, and supports an additional \$14.4 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$55.5 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|--------------|-------------|-------------|--------------|
| Industry Output | \$41,100,000 | \$9,349,000 | \$5,018,000 | \$55,467,000 |
| Employment (# of jobs) | 483 | 75 | 42 | 600 |
| Employee Compensation | \$11,432,000 | \$1,270,000 | \$921,000 | \$13,623,000 |
| Proprietor Income | \$877,000 | \$648,000 | \$249,000 | \$1,774,000 |
| Other Property Type Income | \$3,465,000 | \$787,000 | \$1,051,000 | \$5,303,000 |
| State & Local Taxes [^] | \$1,569,000 | \$317,000 | \$255,000 | \$2,141,000 |

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 (2021 \$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.

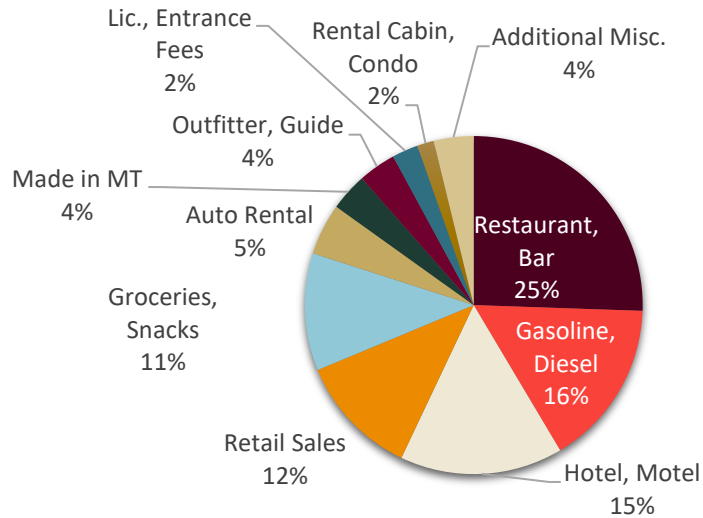
2021 Nonresident Traveler Expenditures & Economic Contribution in Cascade County

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

| | |
|---------------------|----------------------|
| Restaurant, Bar | \$65,392,000 |
| Gasoline, Diesel | \$40,712,000 |
| Hotel, Motel | \$39,898,000 |
| Retail Sales | \$29,914,000 |
| Groceries, Snacks | \$28,747,000 |
| Auto Rental | \$12,616,000 |
| Made in MT | \$9,221,000 |
| Outfitter, Guide | \$9,216,000 |
| Lic., Entrance Fees | \$6,399,000 |
| Rental Cabin, Condo | \$4,093,000 |
| Campgrnd, RV Park | \$3,021,000 |
| Misc. Services | \$2,794,000 |
| Vehicle Repairs | \$2,374,000 |
| Gambling | \$1,164,000 |
| Farmers Mkt | \$206,000 |
| Transp. Fares | \$201,000 |
| TOTAL | \$255,968,000 |



Percent of Nonresident Travel Spending in Cascade County



2021 Contribution of Nonresident Traveler Expenditures in Cascade County

▪2021 estimates of spending in Cascade County by nonresident visitors to the state totaled \$256 million.

▪This \$256 million in local spending directly supports \$217.4 million of economic activity in the region, and supports an additional \$128.6 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$345.9 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|--------------------------------|---------------|--------------|--------------|---------------|
| Industry Output | \$217,364,000 | \$68,258,000 | \$60,307,000 | \$345,929,000 |
| Employment (# of jobs) | 2,418 | 452 | 439 | 3,309 |
| Employee Compensation | \$57,296,000 | \$16,825,000 | \$16,917,000 | \$91,038,000 |
| Proprietor Income | \$6,279,000 | \$2,939,000 | \$2,305,000 | \$11,523,000 |
| Other Property Type Income | \$26,096,000 | \$8,178,000 | \$10,719,000 | \$44,993,000 |
| State & Local Taxes^ | \$8,946,000 | \$2,210,000 | \$2,262,000 | \$13,418,000 |

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 (2021 \$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.

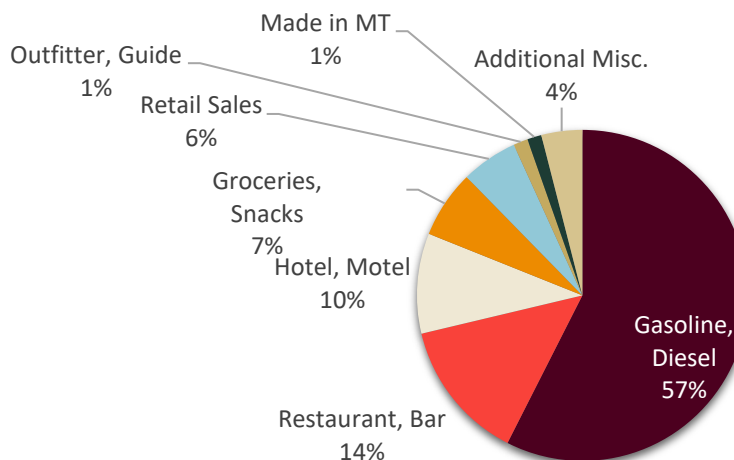
2021 Nonresident Traveler Expenditures & Economic Contribution in Custer County

Table 1 - Total Nonresident Spending in Custer County*,[∅]

| | |
|---------------------|---------------------------------|
| Gasoline, Diesel | \$82,437,000 |
| Restaurant, Bar | \$19,805,000 |
| Hotel, Motel | \$14,030,000 |
| Groceries, Snacks | \$9,473,000 |
| Retail Sales | \$7,927,000 |
| Outfitter, Guide | \$2,028,000 |
| Made in MT | \$1,993,000 |
| Lic., Entrance Fees | \$1,462,000 |
| Vehicle Repairs | \$1,383,000 |
| Gambling | \$1,058,000 |
| Campgrnd, RV Park | \$838,000 |
| Misc. Services | \$810,000 |
| Farmers Mkt | \$137,000 |
| Rental Cabin, Condo | \$49,000 |
| Auto Rental | <i>Insufficient Sample Size</i> |
| Transp. Fares | <i>Insufficient Sample Size</i> |
| TOTAL | \$143,430,000 |



Percent of Nonresident Travel Spending in Custer County



2021 Contribution of Nonresident Traveler Expenditures in Custer County

▪2021 estimates of spending in Custer County by nonresident visitors to the state totaled \$143.4 million.

▪This \$143.4 million in local spending directly supports \$131.7 million of economic activity in the region, and supports an additional \$39.7 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$171.4 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|--------------|--------------|---------------|
| Industry Output | \$131,729,000 | \$23,736,000 | \$15,946,000 | \$171,411,000 |
| Employment (# of jobs) | 687 | 142 | 121 | 950 |
| Employee Compensation | \$17,191,000 | \$4,160,000 | \$3,970,000 | \$25,321,000 |
| Proprietor Income | \$2,296,000 | \$2,055,000 | \$905,000 | \$5,256,000 |
| Other Property Type Income | \$5,478,000 | \$2,144,000 | \$3,035,000 | \$10,657,000 |
| State & Local Taxes [^] | \$3,002,000 | \$1,957,000 | \$755,000 | \$5,714,000 |

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 (2021 \$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.

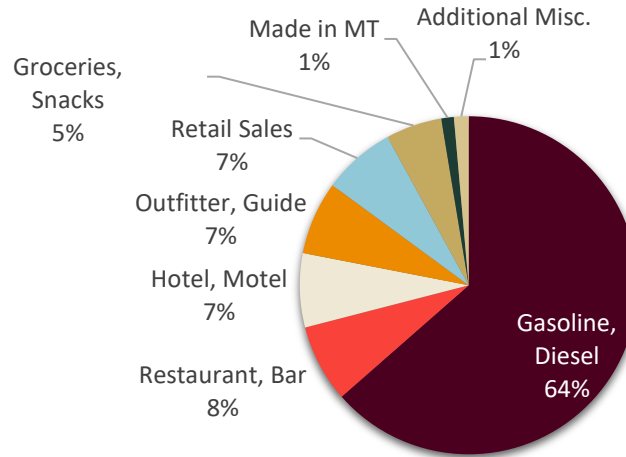
2021 Nonresident Traveler Expenditures & Economic Contribution in Dawson County

Table 1 - Total Nonresident Spending in Dawson County*, †

| | |
|---------------------|---------------------------------|
| Gasoline, Diesel | \$65,705,000 |
| Restaurant, Bar | \$7,686,000 |
| Hotel, Motel | \$7,321,000 |
| Outfitter, Guide | \$7,254,000 |
| Retail Sales | \$7,179,000 |
| Groceries, Snacks | \$5,559,000 |
| Made in MT | \$1,243,000 |
| Lic., Entrance Fees | \$441,000 |
| Campgrnd, RV Park | \$361,000 |
| Vehicle Repairs | \$268,000 |
| Rental Cabin, Condo | \$158,000 |
| Gambling | \$152,000 |
| Misc. Services | \$69,000 |
| Farmers Mkt | \$1,000 |
| Auto Rental | <i>Insufficient Sample Size</i> |
| Transp. Fares | <i>Insufficient Sample Size</i> |
| TOTAL | \$103,397,000 |



Percent of Nonresident Travel Spending in Dawson County



2021 Contribution of Nonresident Traveler Expenditures in Dawson County

- 2021 estimates of spending in Dawson County by nonresident visitors to the state totaled \$103.4 million.
- This \$103.4 million in local spending directly supports \$95.2 million of economic activity in the region, and supports an additional \$31.3 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$126.5 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|--------------------------------|--------------|--------------|-------------|---------------|
| Industry Output | \$95,198,000 | \$22,842,000 | \$8,427,000 | \$126,467,000 |
| Employment (# of jobs) | 461 | 101 | 61 | 623 |
| Employee Compensation | \$11,028,000 | \$4,617,000 | \$2,112,000 | \$17,757,000 |
| Proprietor Income | \$852,000 | \$669,000 | \$240,000 | \$1,761,000 |
| Other Property Type Income | \$2,019,000 | \$2,415,000 | \$1,774,000 | \$6,208,000 |
| State & Local Taxes^ | \$2,051,000 | \$3,079,000 | \$442,000 | \$5,572,000 |

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 (2021 \$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.

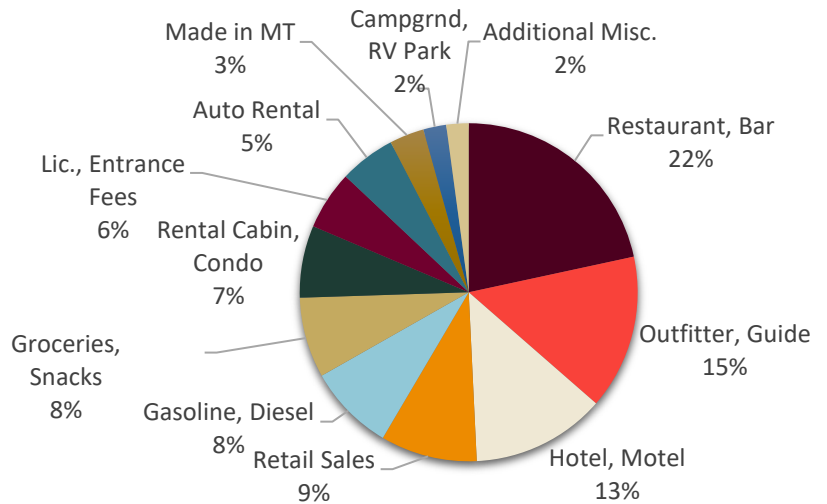
2021 Nonresident Traveler Expenditures & Economic Contribution in Flathead County



Table 1 - Total Nonresident Spending in Flathead County*,[∅]

| | |
|---------------------|----------------------|
| Restaurant, Bar | \$133,622,000 |
| Outfitter, Guide | \$91,471,000 |
| Hotel, Motel | \$79,256,000 |
| Retail Sales | \$57,156,000 |
| Gasoline, Diesel | \$51,330,000 |
| Groceries, Snacks | \$47,573,000 |
| Rental Cabin, Condo | \$42,638,000 |
| Lic., Entrance Fees | \$34,800,000 |
| Auto Rental | \$33,082,000 |
| Made in MT | \$20,479,000 |
| Campgrnd, RV Park | \$13,533,000 |
| Misc. Services | \$6,072,000 |
| Vehicle Repairs | \$3,713,000 |
| Farmers Mkt | \$1,915,000 |
| Gambling | \$1,417,000 |
| Transp. Fares | \$61,000 |
| TOTAL | \$618,118,000 |

Percent of Nonresident Travel Spending in Flathead County



2021 Contribution of Nonresident Traveler Expenditures in Flathead County

- 2021 estimates of spending in Flathead County by nonresident visitors to the state totaled \$618.1 million.
- This \$618.1 million in local spending directly supports \$540.9 million of economic activity in the region, and supports an additional \$401.3 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$942.2 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|---------------|---------------|---------------|
| Industry Output | \$540,913,000 | \$215,589,000 | \$185,674,000 | \$942,176,000 |
| Employment (# of jobs) | 6,540 | 1,444 | 1,402 | 9,386 |
| Employee Compensation | \$195,278,000 | \$39,537,000 | \$48,896,000 | \$283,711,000 |
| Proprietor Income | \$13,330,000 | \$13,571,000 | \$10,564,000 | \$37,465,000 |
| Other Property Type Income | \$50,047,000 | \$21,756,000 | \$31,822,000 | \$103,625,000 |
| State & Local Taxes [^] | \$25,245,000 | \$10,455,000 | \$8,731,000 | \$44,431,000 |

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 (2021 \$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.

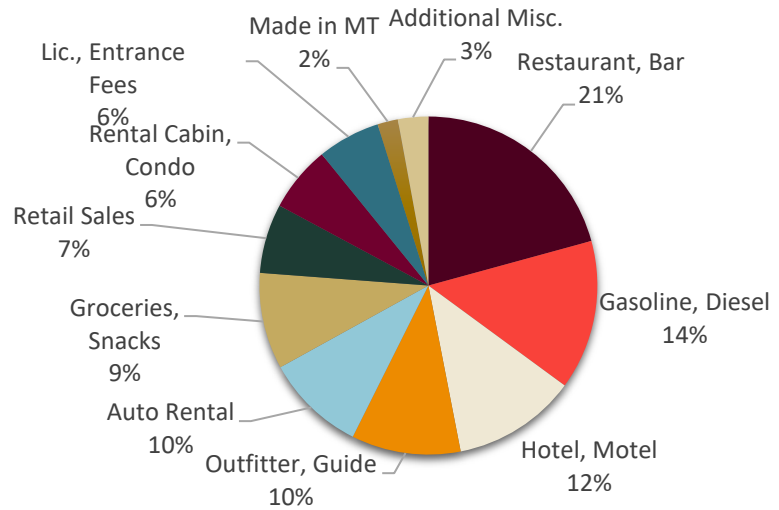
2021 Nonresident Traveler Expenditures & Economic Contribution in Gallatin County



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

| | |
|---------------------|------------------------|
| Restaurant, Bar | \$214,600,000 |
| Gasoline, Diesel | \$148,083,000 |
| Hotel, Motel | \$122,739,000 |
| Outfitter, Guide | \$108,069,000 |
| Auto Rental | \$99,205,000 |
| Groceries, Snacks | \$95,372,000 |
| Retail Sales | \$68,653,000 |
| Rental Cabin, Condo | \$65,192,000 |
| Lic., Entrance Fees | \$62,072,000 |
| Made in MT | \$20,223,000 |
| Misc. Services | \$10,887,000 |
| Campgrnd, RV Park | \$9,552,000 |
| Vehicle Repairs | \$7,635,000 |
| Gambling | \$1,231,000 |
| Farmers Mkt | \$670,000 |
| Transp. Fares | \$48,000 |
| TOTAL | \$1,034,231,000 |

Percent of Nonresident Travel Spending in Gallatin County



2021 Contribution of Nonresident Traveler Expenditures in Gallatin County

▪2021 estimates of spending in Gallatin County by nonresident visitors to the state totaled \$1.03 billion.

▪This \$1.03 billion in local spending directly supports \$925.5 million of economic activity in the region, and supports an additional \$639.3 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$1.56 billion.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|--------------------------------|---------------|---------------|---------------|-----------------|
| Industry Output | \$925,508,000 | \$373,811,000 | \$265,499,000 | \$1,564,818,000 |
| Employment (# of jobs) | 9,741 | 2,222 | 1,912 | 13,875 |
| Employee Compensation | \$279,742,000 | \$76,679,000 | \$73,701,000 | \$430,122,000 |
| Proprietor Income | \$57,693,000 | \$21,142,000 | \$15,594,000 | \$94,429,000 |
| Other Property Type Income | \$81,494,000 | \$40,327,000 | \$52,263,000 | \$174,084,000 |
| State & Local Taxes^ | \$41,159,000 | \$21,087,000 | \$12,427,000 | \$74,673,000 |

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 (2021 \$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.

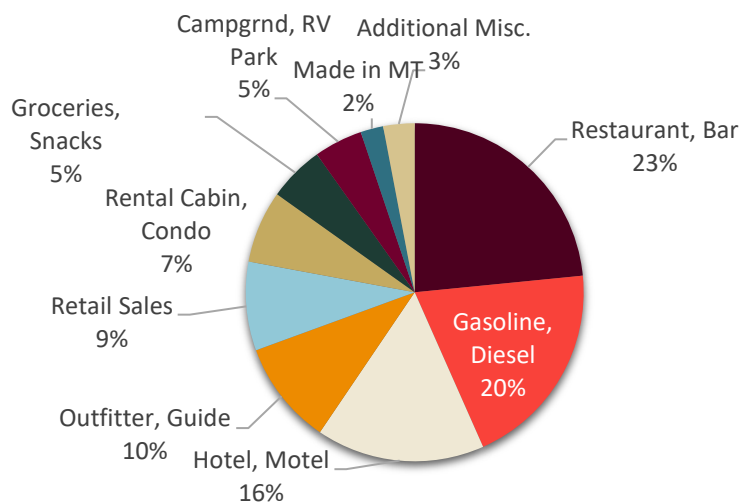
2021 Nonresident Traveler Expenditures & Economic Contribution in Glacier County

Table 1 - Total Nonresident Spending in Glacier County*,[∅]

| | |
|---------------------|----------------------|
| Restaurant, Bar | \$38,973,000 |
| Gasoline, Diesel | \$33,156,000 |
| Hotel, Motel | \$26,800,000 |
| Outfitter, Guide | \$16,544,000 |
| Retail Sales | \$14,123,000 |
| Rental Cabin, Condo | \$11,523,000 |
| Groceries, Snacks | \$8,869,000 |
| Campgrnd, RV Park | \$7,736,000 |
| Made in MT | \$3,620,000 |
| Auto Rental | \$1,791,000 |
| Lic., Entrance Fees | \$1,712,000 |
| Misc. Services | \$1,057,000 |
| Gambling | \$203,000 |
| Vehicle Repairs | \$135,000 |
| Farmers Mkt | \$77,000 |
| Transp. Fares | \$8,000 |
| TOTAL | \$166,325,000 |



Percent of Nonresident Travel Spending in Glacier County



2021 Contribution of Nonresident Traveler Expenditures in Glacier County

▪2021 estimates of spending in Glacier County by nonresident visitors to the state totaled \$166.3 million.

▪This \$166.3 million in local spending directly supports \$147.5 million of economic activity in the region, and supports an additional \$36.9 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$184.4 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|--------------|--------------|---------------|
| Industry Output | \$147,541,000 | \$21,089,000 | \$15,816,000 | \$184,446,000 |
| Employment (# of jobs) | 1,467 | 124 | 114 | 1,705 |
| Employee Compensation | \$42,535,000 | \$4,571,000 | \$3,492,000 | \$50,598,000 |
| Proprietor Income | \$7,236,000 | \$850,000 | \$805,000 | \$8,891,000 |
| Other Property Type Income | \$12,766,000 | \$2,639,000 | \$3,226,000 | \$18,631,000 |
| State & Local Taxes [^] | \$6,242,000 | \$771,000 | \$718,000 | \$7,731,000 |

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 (2021 \$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.

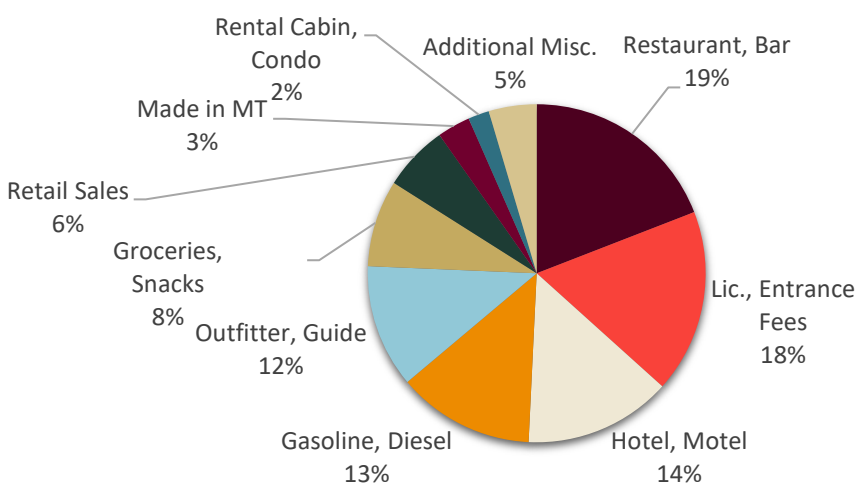
2021 Nonresident Traveler Expenditures & Economic Contribution in Lewis & Clark County

Table 1 - Total Nonresident Spending in Lewis & Clark County*,[∅]

| | |
|---------------------|----------------------|
| Restaurant, Bar | \$38,558,000 |
| Lic., Entrance Fees | \$35,427,000 |
| Hotel, Motel | \$28,454,000 |
| Gasoline, Diesel | \$26,467,000 |
| Outfitter, Guide | \$23,790,000 |
| Groceries, Snacks | \$16,763,000 |
| Retail Sales | \$12,646,000 |
| Made in MT | \$6,379,000 |
| Rental Cabin, Condo | \$4,062,000 |
| Auto Rental | \$3,956,000 |
| Misc. Services | \$2,147,000 |
| Gambling | \$1,241,000 |
| Campgrnd, RV Park | \$1,058,000 |
| Vehicle Repairs | \$465,000 |
| Farmers Mkt | \$260,000 |
| Transp. Fares | \$125,000 |
| TOTAL | \$201,797,000 |



Percent of Nonresident Travel Spending in Lewis & Clark County



2021 Contribution of Nonresident Traveler Expenditures in Lewis & Clark County

▪2021 estimates of spending in Lewis & Clark County by nonresident visitors to the state totaled \$201.8 million.

▪This \$201.8 million in local spending directly supports \$174.7 million of economic activity in the region, and supports an additional \$110.9 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$285.6 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|--------------|--------------|---------------|
| Industry Output | \$174,654,000 | \$61,711,000 | \$49,192,000 | \$285,557,000 |
| Employment (# of jobs) | 2,122 | 385 | 357 | 2,864 |
| Employee Compensation | \$60,395,000 | \$12,536,000 | \$13,762,000 | \$86,693,000 |
| Proprietor Income | \$2,451,000 | \$2,980,000 | \$1,922,000 | \$7,353,000 |
| Other Property Type Income | \$14,479,000 | \$6,829,000 | \$9,319,000 | \$30,627,000 |
| State & Local Taxes [^] | \$7,437,000 | \$2,874,000 | \$2,316,000 | \$12,627,000 |

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 (2021 \$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.

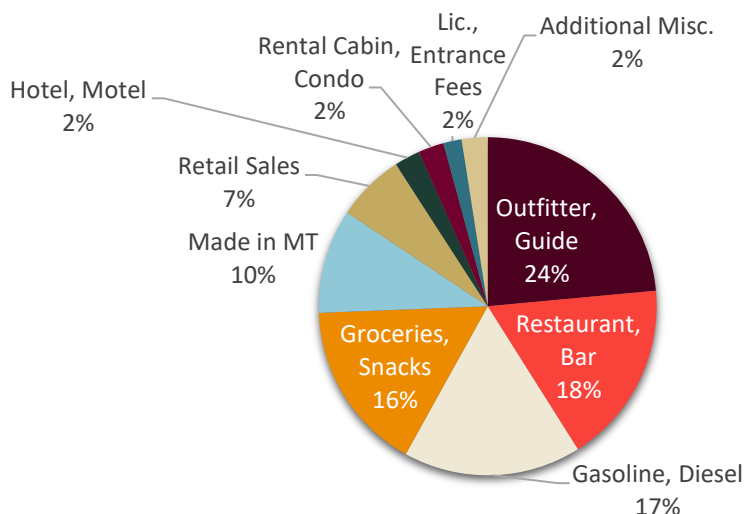
2021 Nonresident Traveler Expenditures & Economic Contribution in Madison County



Table 1 - Total Nonresident Spending in Madison County*,[∅]

| | |
|---------------------|---------------------|
| Outfitter, Guide | \$16,376,000 |
| Restaurant, Bar | \$12,185,000 |
| Gasoline, Diesel | \$11,845,000 |
| Groceries, Snacks | \$11,357,000 |
| Made in MT | \$6,941,000 |
| Retail Sales | \$4,534,000 |
| Hotel, Motel | \$1,712,000 |
| Rental Cabin, Condo | \$1,702,000 |
| Lic., Entrance Fees | \$1,221,000 |
| Campgrnd, RV Park | \$977,000 |
| Vehicle Repairs | \$428,000 |
| Farmers Mkt | \$170,000 |
| Auto Rental | \$72,000 |
| Transp. Fares | \$50,000 |
| Misc. Services | \$18,000 |
| Gambling | \$6,000 |
| TOTAL | \$69,593,000 |

Percent of Nonresident Travel Spending in Madison County



2021 Contribution of Nonresident Traveler Expenditures in Madison County

▪2021 estimates of spending in Madison County by nonresident visitors to the state totaled \$69.6 million.

▪This \$69.6 million in local spending directly supports \$56.9 million of economic activity in the region, and supports an additional \$27.2 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$84.1 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|--------------|--------------|-------------|--------------|
| Industry Output | \$56,929,000 | \$20,084,000 | \$7,088,000 | \$84,101,000 |
| Employment (# of jobs) | 707 | 102 | 52 | 861 |
| Employee Compensation | \$16,971,000 | \$2,202,000 | \$1,658,000 | \$20,831,000 |
| Proprietor Income | \$2,140,000 | \$3,223,000 | \$308,000 | \$5,671,000 |
| Other Property Type Income | \$2,929,000 | \$2,212,000 | \$1,487,000 | \$6,628,000 |
| State & Local Taxes [^] | \$2,092,000 | \$885,000 | \$321,000 | \$3,298,000 |

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.

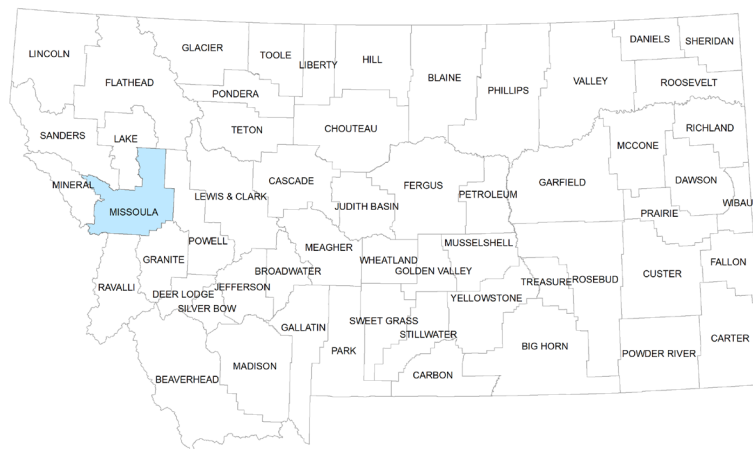
*Data is collected at the state level. The two-year average of expenditures (2021 \$s) was used to help account for small and varying sample sizes at the county level.

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

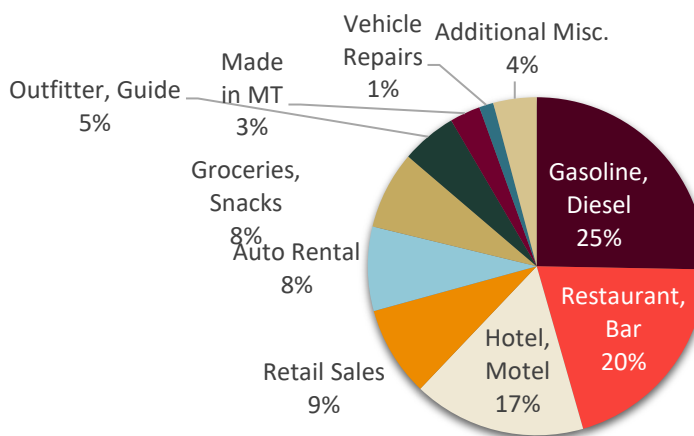
2021 Nonresident Traveler Expenditures & Economic Contribution in Missoula County

Table 1 - Total Nonresident Spending in Missoula County*,[∅]

| | |
|---------------------|----------------------|
| Gasoline, Diesel | \$74,328,000 |
| Restaurant, Bar | \$59,563,000 |
| Hotel, Motel | \$48,576,000 |
| Retail Sales | \$25,356,000 |
| Auto Rental | \$23,681,000 |
| Groceries, Snacks | \$21,910,000 |
| Outfitter, Guide | \$15,610,000 |
| Made in MT | \$8,614,000 |
| Vehicle Repairs | \$4,015,000 |
| Rental Cabin, Condo | \$3,355,000 |
| Campgrnd, RV Park | \$2,688,000 |
| Lic., Entrance Fees | \$2,620,000 |
| Misc. Services | \$1,730,000 |
| Gambling | \$885,000 |
| Farmers Mkt | \$574,000 |
| Transp. Fares | \$326,000 |
| TOTAL | \$293,831,000 |



Percent of Nonresident Travel Spending in Missoula County



2021 Contribution of Nonresident Traveler Expenditures in Missoula County

▪2021 estimates of spending in Missoula County by nonresident visitors to the state totaled \$293.8 million.

▪This \$293.8 million in local spending directly supports \$260.2 million of economic activity in the region, and supports an additional \$205.0 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$465.3 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|---------------|--------------|---------------|
| Industry Output | \$260,259,000 | \$130,385,000 | \$74,637,000 | \$465,281,000 |
| Employment (# of jobs) | 2,404 | 758 | 553 | 3,715 |
| Employee Compensation | \$56,460,000 | \$27,076,000 | \$21,089,000 | \$104,625,000 |
| Proprietor Income | \$14,126,000 | \$5,815,000 | \$3,919,000 | \$23,860,000 |
| Other Property Type Income | \$20,970,000 | \$12,628,000 | \$13,785,000 | \$47,383,000 |
| State & Local Taxes [^] | \$10,216,000 | \$8,489,000 | \$3,440,000 | \$22,145,000 |

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.

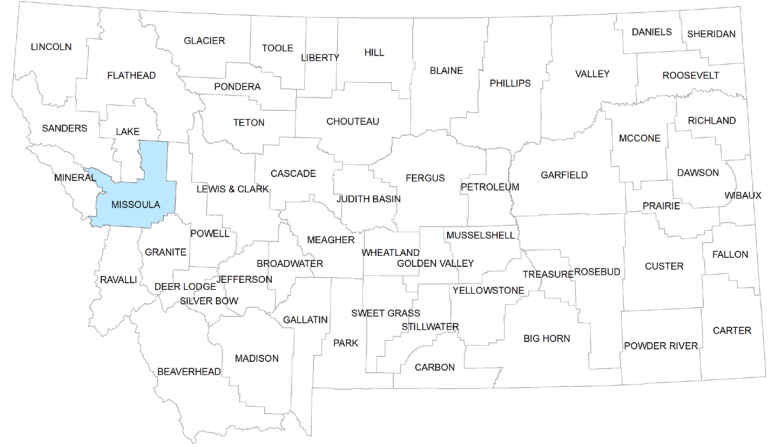
*Data is collected at the state level. The two-year average of expenditures (2021 \$s) was used to help account for small and varying sample sizes at the county level.

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

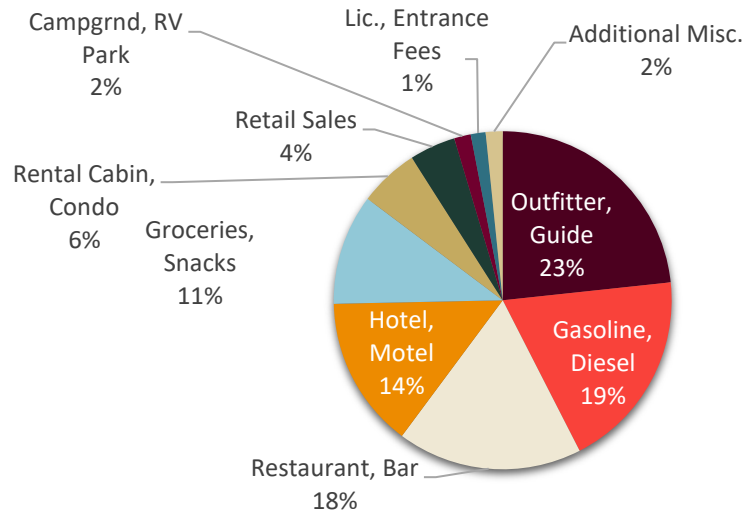
2021 Nonresident Traveler Expenditures & Economic Contribution in Park County

Table 1 - Total Nonresident Spending in Missoula County*,[∅]

| | |
|---------------------|---------------------------------|
| Outfitter, Guide | \$78,858,000 |
| Gasoline, Diesel | \$64,861,000 |
| Restaurant, Bar | \$59,876,000 |
| Hotel, Motel | \$49,041,000 |
| Groceries, Snacks | \$35,800,000 |
| Rental Cabin, Condo | \$19,350,000 |
| Retail Sales | \$14,887,000 |
| Campgrnd, RV Park | \$5,396,000 |
| Lic., Entrance Fees | \$4,811,000 |
| Made in MT | \$4,089,000 |
| Misc. Services | \$877,000 |
| Farmers Mkt | \$342,000 |
| Gambling | \$128,000 |
| Vehicle Repairs | \$31,000 |
| Auto Rental | <i>Insufficient Sample Size</i> |
| Transp. Fares | <i>Insufficient Sample Size</i> |
| TOTAL | \$338,346,000 |



Percent of Nonresident Travel Spending in Park County



2021 Contribution of Nonresident Traveler Expenditures in Park County

- 2021 estimates of spending in Park County by nonresident visitors to the state totaled \$338.3 million.
- This \$338.3 million in local spending directly supports \$304.8 million of economic activity in the region, and supports an additional \$105.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$409.9 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|--------------|--------------|---------------|
| Industry Output | \$304,830,000 | \$57,839,000 | \$47,243,000 | \$409,912,000 |
| Employment (# of jobs) | 3,184 | 430 | 374 | 3,988 |
| Employee Compensation | \$107,045,000 | \$9,455,000 | \$11,301,000 | \$127,801,000 |
| Proprietor Income | \$9,065,000 | \$3,770,000 | \$2,349,000 | \$15,184,000 |
| Other Property Type Income | \$16,888,000 | \$7,145,000 | \$10,875,000 | \$34,908,000 |
| State & Local Taxes [^] | \$12,669,000 | \$1,885,000 | \$2,323,000 | \$16,877,000 |

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 (2021 \$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.

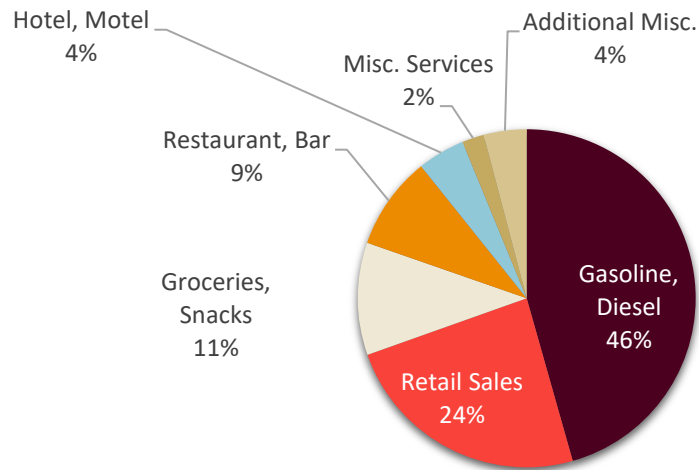
2021 Nonresident Traveler Expenditures & Economic Contribution in Richland County

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

| | |
|---------------------|---------------------------------|
| Gasoline, Diesel | \$61,456,000 |
| Retail Sales | \$32,293,000 |
| Groceries, Snacks | \$14,496,000 |
| Restaurant, Bar | \$12,037,000 |
| Hotel, Motel | \$6,119,000 |
| Misc. Services | \$2,826,000 |
| Vehicle Repairs | \$2,779,000 |
| Gambling | \$1,124,000 |
| Made in MT | \$760,000 |
| Lic., Entrance Fees | \$487,000 |
| Auto Rental | \$229,000 |
| Campgrnd, RV Park | \$133,000 |
| Rental Cabin, Condo | \$18,000 |
| Farmers Mkt | <i>Insufficient Sample Size</i> |
| Outfitter, Guide | <i>Insufficient Sample Size</i> |
| Transp. Fares | <i>Insufficient Sample Size</i> |
| TOTAL | \$134,758,000 |



Percent of Nonresident Travel Spending in Richland County



2021 Contribution of Nonresident Traveler Expenditures in Richland County

- 2021 estimates of spending in Richland County by nonresident visitors to the state totaled \$134.8 million.
- This \$134.8 million in local spending directly supports \$104.4 million of economic activity in the region, and supports an additional \$53.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$158.3 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|---------------|---------------|--------------|---------------|
| Industry Output | \$104,421,000 | \$37,123,000 | \$16,752,000 | \$158,296,000 |
| Employment (# of jobs) | 570 | 211 | 115 | 896 |
| Employee Compensation | \$15,703,000 | \$17,040,000 | \$4,445,000 | \$37,188,000 |
| Proprietor Income | \$4,179,000 | \$4,462,000 | \$1,129,000 | \$9,770,000 |
| Other Property Type Income | \$3,138,000 | -\$38,938,000 | \$3,043,000 | -\$32,757,000 |
| State & Local Taxes [^] | \$2,116,000 | \$6,679,000 | \$818,000 | \$9,613,000 |

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 (2021 \$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.

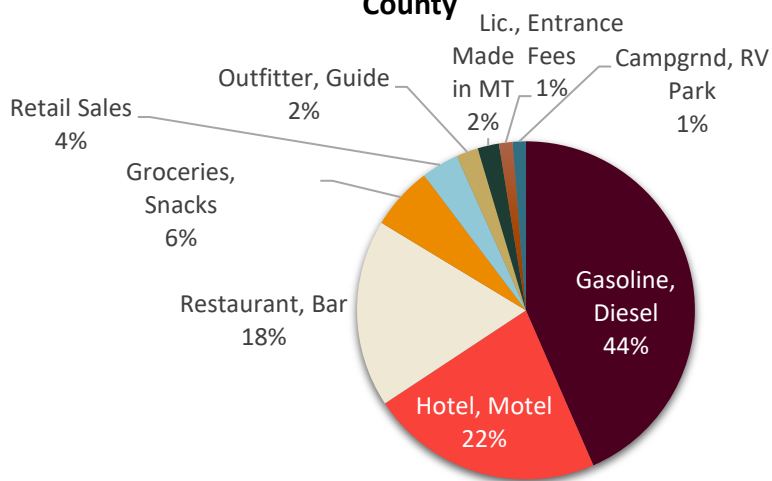
2021 Nonresident Traveler Expenditures & Economic Contribution in Silver Bow County

Table 1 - Total Nonresident Spending in Silver Bow County*,[∅]

| | |
|---------------------|----------------------|
| Gasoline, Diesel | \$47,916,000 |
| Hotel, Motel | \$24,520,000 |
| Restaurant, Bar | \$19,782,000 |
| Groceries, Snacks | \$6,659,000 |
| Retail Sales | \$3,945,000 |
| Outfitter, Guide | \$2,323,000 |
| Made in MT | \$2,252,000 |
| Lic., Entrance Fees | \$1,443,000 |
| Campgrnd, RV Park | \$1,384,000 |
| Vehicle Repairs | \$844,000 |
| Misc. Services | \$547,000 |
| Gambling | \$459,000 |
| Rental Cabin, Condo | \$374,000 |
| Auto Rental | \$335,000 |
| Farmers Mkt | \$72,000 |
| Transp. Fares | \$6,000 |
| TOTAL | \$112,862,000 |



Percent of Nonresident Travel Spending in Silver Bow County



2021 Contribution of Nonresident Traveler Expenditures in Silver Bow County

▪2021 estimates of spending in Silver Bow County by nonresident visitors to the state totaled \$112.9 million.

▪This \$112.9 million in local spending directly supports \$57.2 million of economic activity in the region, and supports an additional \$38 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$95.2 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|--------------|--------------|--------------|--------------|
| Industry Output | \$57,155,000 | \$22,234,000 | \$15,769,000 | \$95,158,000 |
| Employment (# of jobs) | 800 | 157 | 122 | 1,079 |
| Employee Compensation | \$17,465,000 | \$5,408,000 | \$4,113,000 | \$26,986,000 |
| Proprietor Income | \$2,227,000 | \$1,409,000 | \$1,095,000 | \$4,731,000 |
| Other Property Type Income | \$6,684,000 | \$2,378,000 | \$2,778,000 | \$11,840,000 |
| State & Local Taxes [^] | \$2,981,000 | \$754,000 | \$753,000 | \$4,488,000 |

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.

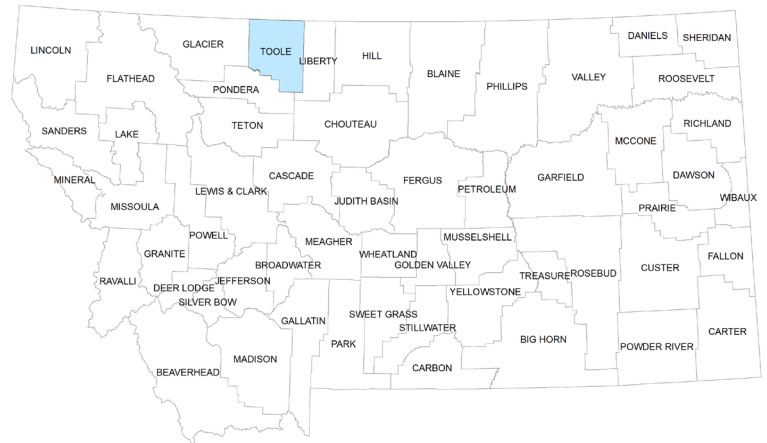
*Data is collected at the state level. The two-year average of expenditures (2021 \$s) was used to help account for small and varying sample sizes at the county level.

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

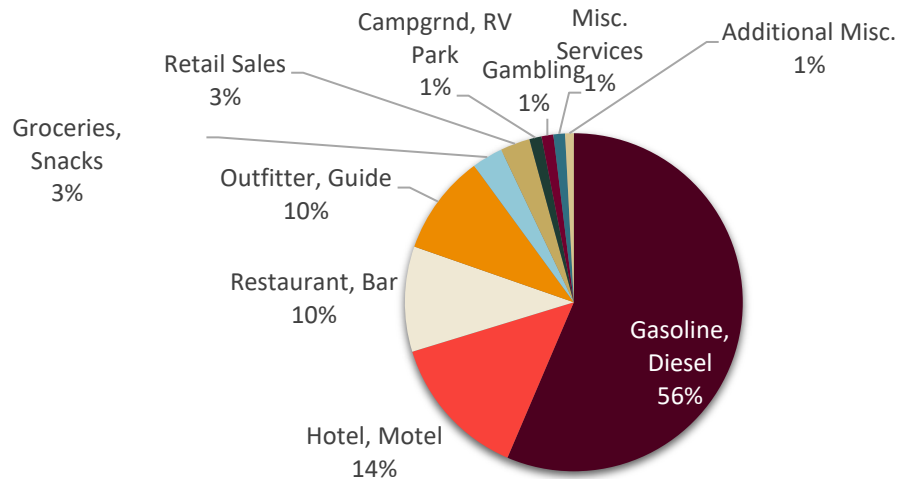
2021 Nonresident Traveler Expenditures & Economic Contribution in Toole County

Table 1 - Total Nonresident Spending in Toole County*,[∅]

| | |
|---------------------|---------------------------------|
| Gasoline, Diesel | \$33,514,000 |
| Hotel, Motel | \$8,227,000 |
| Restaurant, Bar | \$5,980,000 |
| Outfitter, Guide | \$5,710,000 |
| Groceries, Snacks | \$1,764,000 |
| Retail Sales | \$1,682,000 |
| Campgrnd, RV Park | \$696,000 |
| Gambling | \$672,000 |
| Misc. Services | \$659,000 |
| Lic., Entrance Fees | \$260,000 |
| Farmers Mkt | \$137,000 |
| Made in MT | \$54,000 |
| Rental Cabin, Condo | \$41,000 |
| Vehicle Repairs | <i>Insufficient Sample Size</i> |
| Transp. Fares | <i>Insufficient Sample Size</i> |
| Auto Rental | <i>Insufficient Sample Size</i> |
| TOTAL | \$59,396,000 |



Percent of Nonresident Travel Spending in Toole County



2021 Contribution of Nonresident Traveler Expenditures in Toole County

▪2021 estimates of spending in Toole County by nonresident visitors to the state totaled \$59.4 million.

▪This \$59.4 million in local spending directly supports \$57.2 million of economic activity in the region, and supports an additional \$17.1 million of economic activity, indirectly.

▪The total contribution of nonresident spending to the regional economy was \$74.3 million.

| Table 2 - 2021 Economic Impact | Direct | Indirect | Induced | Combined |
|----------------------------------|--------------|--------------|-------------|--------------|
| Industry Output | \$57,259,000 | \$13,676,000 | \$3,406,000 | \$74,341,000 |
| Employment (# of jobs) | 345 | 63 | 23 | 431 |
| Employee Compensation | \$8,987,000 | \$2,511,000 | \$777,000 | \$12,275,000 |
| Proprietor Income | \$420,000 | \$748,000 | \$174,000 | \$1,342,000 |
| Other Property Type Income | \$2,101,000 | \$739,000 | \$837,000 | \$3,677,000 |
| State & Local Taxes [^] | \$1,581,000 | \$1,820,000 | \$193,000 | \$3,594,000 |

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 (2021 \$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.