The Economic Impact of Travel

Idaho

2025 Preliminary

State, Regional, & County Impacts

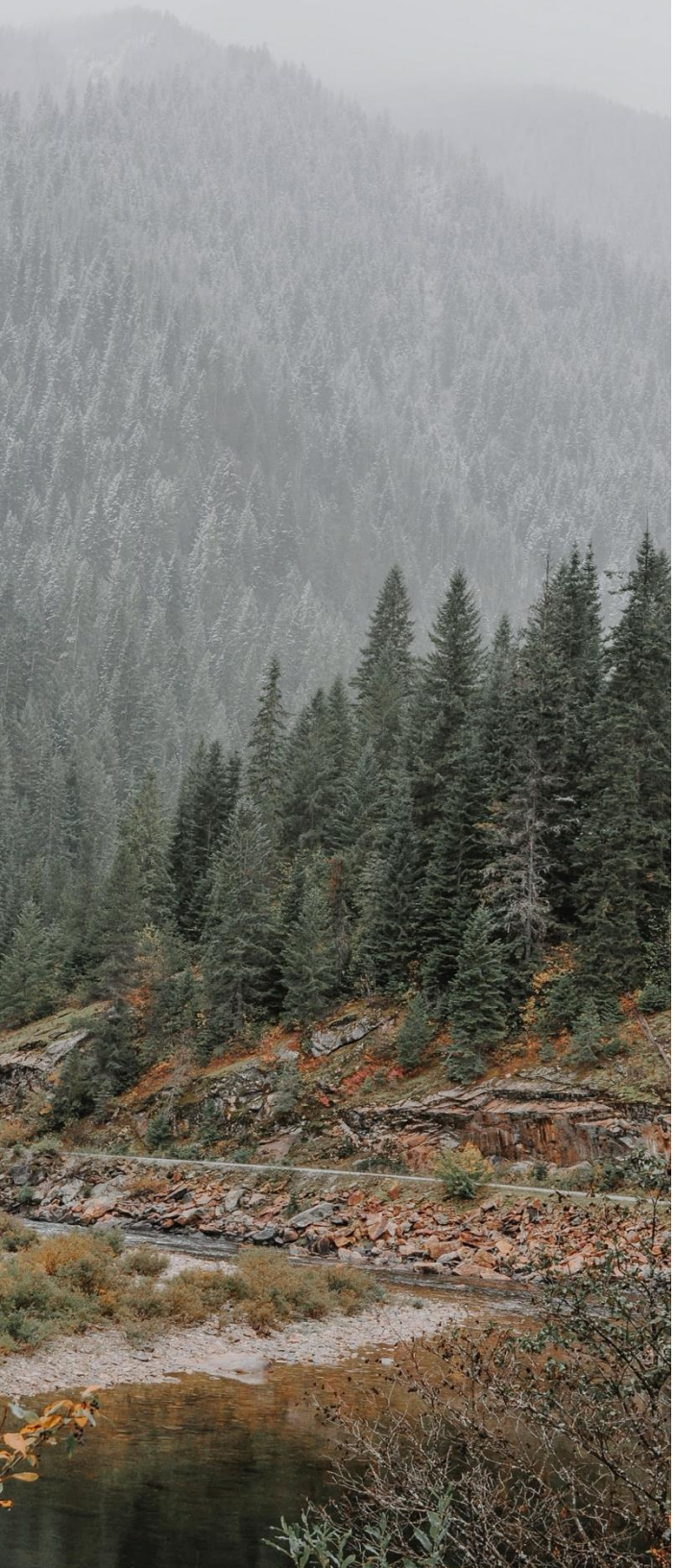
October, 2026

PREPARED FOR
Visit Idaho



DRA
insights with integrity

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The Economic Impact of Travel in Idaho

2025 Preliminary

State, Regional, & County Impacts

Visit Idaho

10/15/2026

PRIMARY RESEARCH CONDUCTED BY

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Photo by Jenny Uhling

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Introduction

Purpose of the Report

This report was commissioned by Visit Idaho to assess the economic impact of travel to the state of Idaho. The travel industry represents an important component of Idaho's state economy. Spending associated with travel in Idaho generates earnings, employment and taxes throughout the state. Many counties in Idaho contain attractive travel destinations and consider the travel industry a primary economic industry in their area. This report describes economic activity associated with travel throughout the state, detailing important trends within the industry.

How to Use the Report

This report brings together data collected from many sources, both public and private, that are relevant to the measurement of travel throughout Idaho. Our analysis synthesizes the data and generates estimates for the impact of travel to counties in the state. We encourage the reader of this report to use the table of contents to navigate to the section of the report that is relevant to their concerns and to reach out to Dean Runyan Associates with any questions on further detail or clarification.



Spending, Employment, Earnings, and Taxes are the key metrics to measure the economic impacts of travel.

What are travel impacts?

Travel impacts measure the economic impact of travel activity within a region. Because travel is a broad activity that encompasses many other activities (transportation, lodging, eating & drinking, recreational activities, etc.), it is necessary to make economic impact estimates for each travel related activity to determine the total travel impact. Travel impact reports are used by industry stakeholders to benchmark the travel industry against other local industries, understand the makeup of travel activity in their region, and communicate the economic relevance of the regional travel industry.

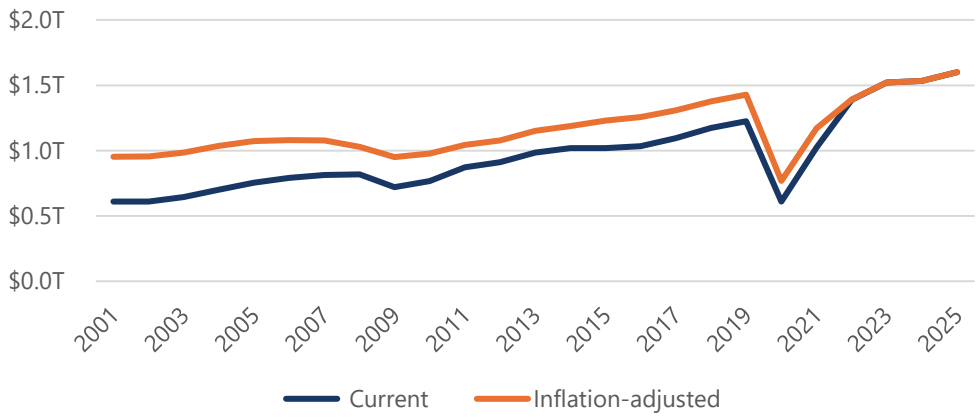
U.S. Travel Impacts

2025p

U.S. Travel Impacts

Direct Travel Spending

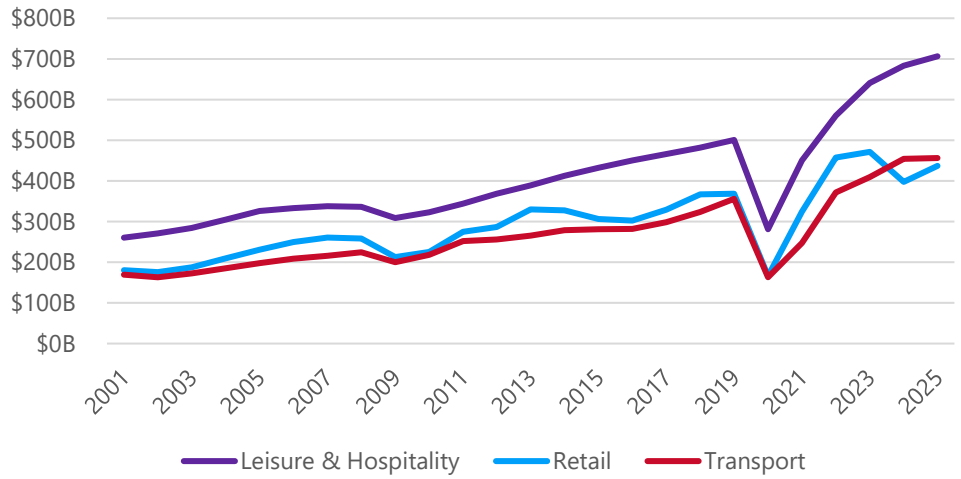
Direct Travel Spending 2001-2025



Source: Dean Runyan Associates
Note: Real spending is in chained 2025 dollars. Chained dollars are inflation-adjusted measures that account for changes in both prices and consumer spending patterns over time.

National travel-related spending was $1.6 trillion in 2025, a **4.27% (4.29% inflation-adjusted) increase** compared to the previous year.

Direct Travel Spending by Commodity 2001-2025



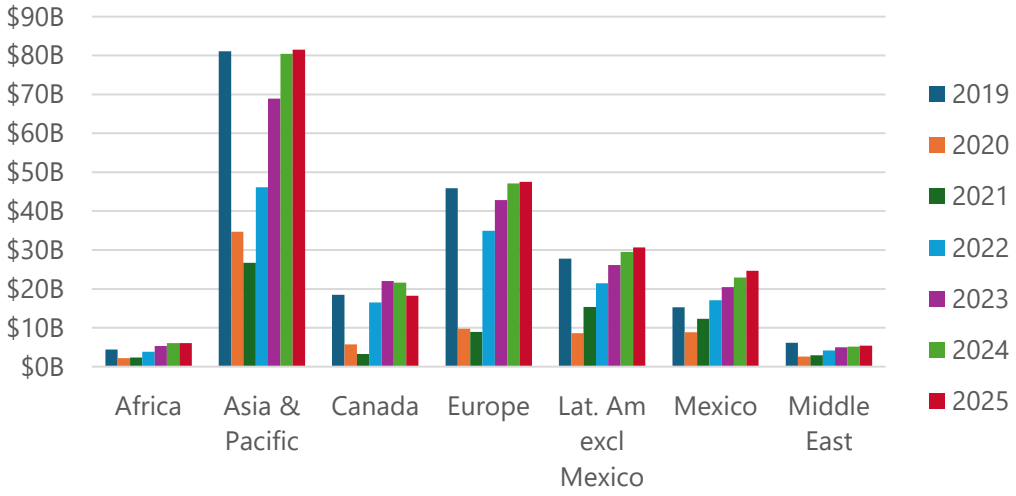
Source: Dean Runyan Associates
Note: DRA estimates 2025 national direct spending using Bureau of Economic Analysis (BEA) Travel and Tourism Satellite Account data from 2024 and available annual industry trends for 2025.

Travelers spent $706.4 billion on Leisure & Hospitality in 2025, accounting **for 44.2% of the total direct expenditures.**

U.S. Travel Impacts

Direct Spending

International Travel Spending 2019-2025



Overall, **international visitor spending increased 0.6% in 2025,** reaching $214.1 billion. Spending increased across most major international markets, led by Mexico and the Middle East, while spending from Canadian visitors declined 15.6%.



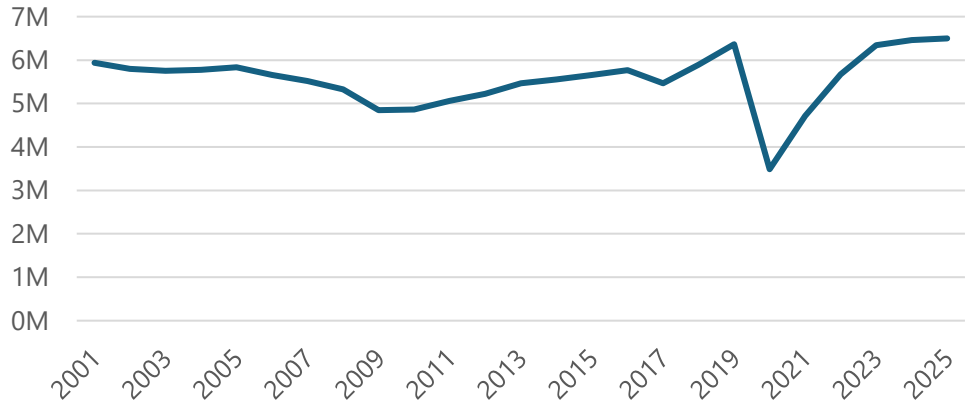
Photo by SERHAT TUĞ

Sources: Dean Runyan Associates, U.S. Bureau of Economic Analysis
Note: International travel spending estimates do not include spending on health, education, or border-worker travel activity.

U.S. Travel Impacts

Direct Employment

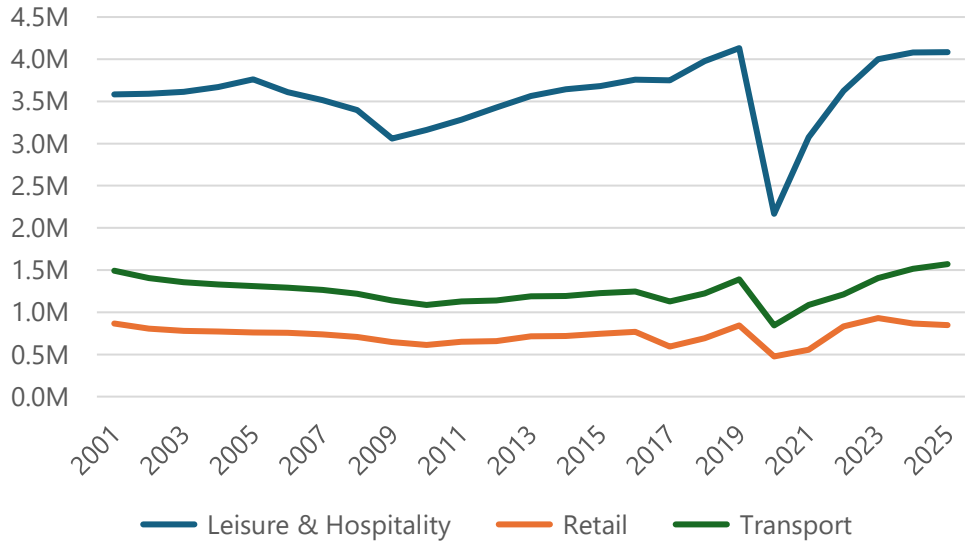
Direct Employment, 2001-2025



Sources: Dean Runyan Associates, U.S. Bureau of Economic Analysis

Approximately **40.8 thousand jobs were gained in 2025, a 0.6% increase** compared to the previous year.

Direct Employment by Industry Sector, 2001-2025



Sources: Dean Runyan Associates, U.S. Bureau of Economic Analysis

Travel supported approximately 4.1 million jobs in the Leisure and Hospitality industry in 2025, a **0.1% increase** compared to the previous year.

Idaho Travel Impacts

2025p

Idaho Travel Impacts

Direct Travel Impacts

2025p Summary

3.8% Increase in Travel Spending

Direct travel spending in Idaho increased 3.8% from $6.1 billion in 2024 to $6.3 billion in 2025.

470 Jobs Gained

Direct travel-generated employment grew from 56,350 in 2024 to 56,820 in 2025. Approximately 470 jobs were generated, representing a 0.8% increase compared to the previous year.

4.9% Growth in Earnings

Direct travel-generated earnings grew from $1.9 billion in 2024 to $2.0 billion in 2025, an increase of approximately $93.9 million or 4.9%.

4.5% Increase in Tax Revenue

Tax revenue (local and state) generated by travel spending grew from $452.0 million in 2024 to $472.3 million in 2025, a 4.5% increase. In 2025, state and local tax revenue generated approximately $662 per Idaho household.

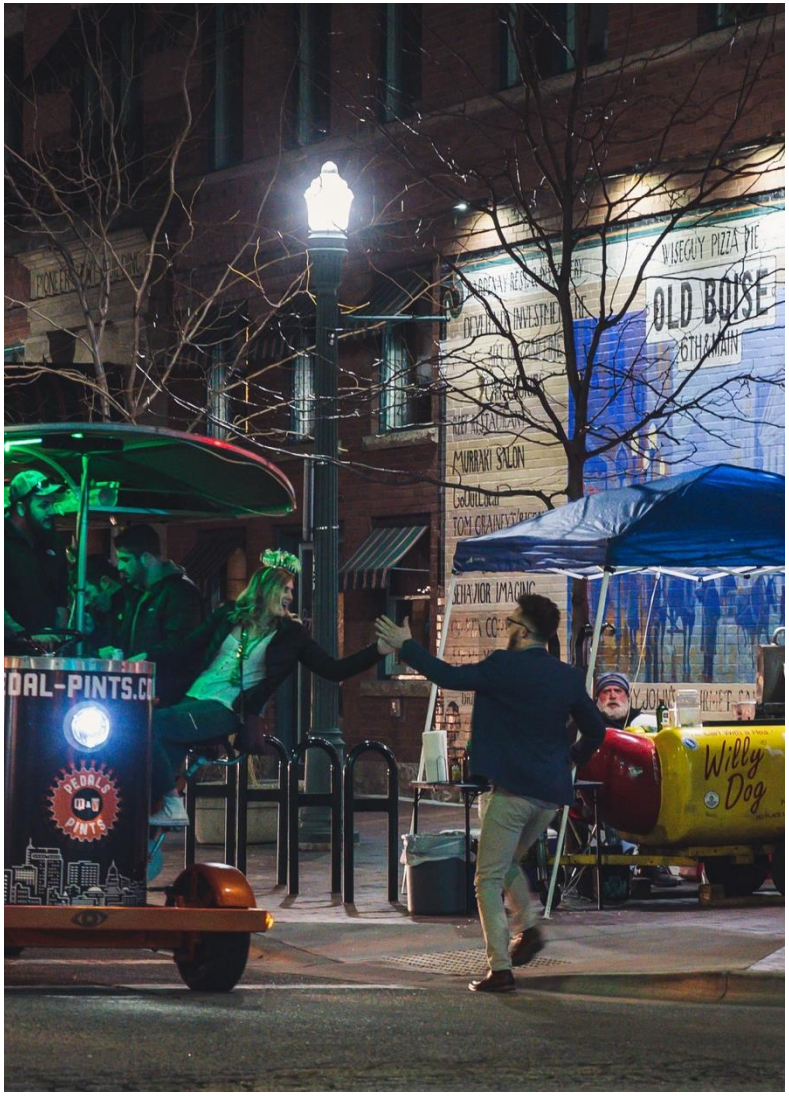


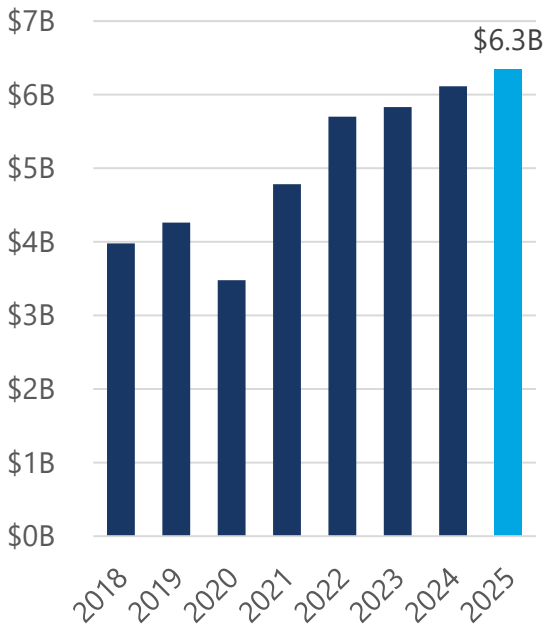
Photo by Brett Sayles

Source: Dean Runyan Associates
Note: Estimates are subject to revision when more complete or additional data becomes available.

Idaho Travel Impacts

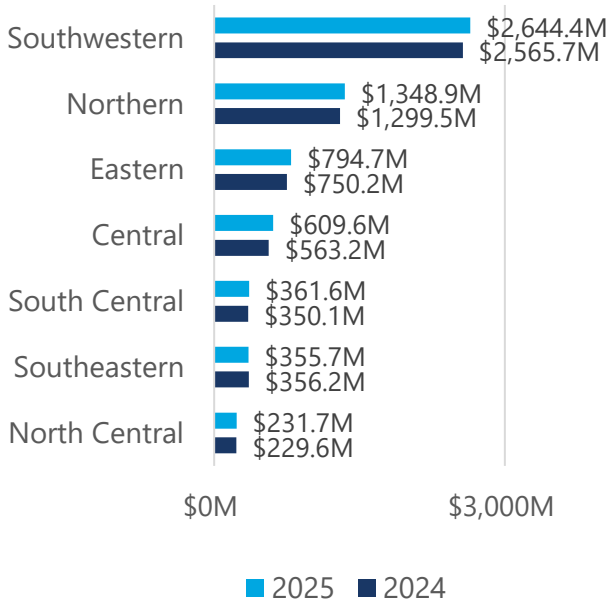
Direct Travel Spending

Direct travel spending increased by $232.1 million in 2025.



Direct travel spending grew from $6.1 billion in 2024 to $6.3 billion in 2025, a 3.8% increase. Between 2018 and 2025, direct travel spending increased 6.9% on average each year.

Direct travel spending increased in most Idaho regions.



Direct travel spending increased throughout most of Idaho's regions between 2024 and 2025. The Central region experienced the greatest growth (8.2%) and Southeastern region was the only region to decline (-0.2%).

Visitor + Other Travel

=

Direct Travel Spending

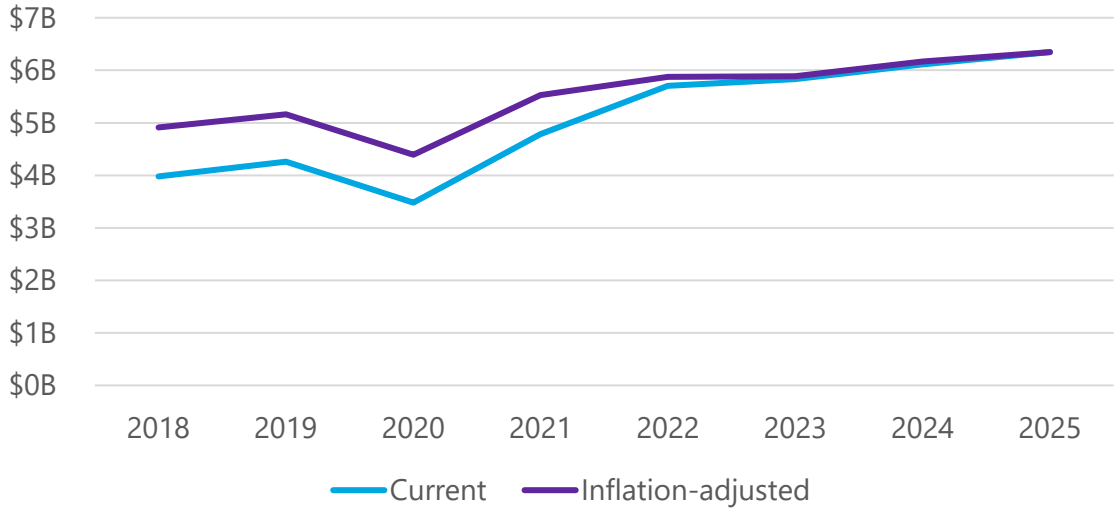
Direct travel spending includes both destination spending and other spending. **Visitor spending** refers to all spending on goods and services by visitors at the destination. **Other travel spending** refers to expenditures at travel arrangement companies located in Idaho, convention and trade show operations, and spending on air by residents to leave the state for travel elsewhere. These expenditures directly support the travel industry in Idaho but are not considered visitor spending in our methodology.

Idaho Travel Impacts

Inflation-Adjusted Spending

Direct travel spending grew from $6.1 billion in 2024 to $6.3 billion in 2025, an increase of $232.1 million in current dollars. However, considering the reduced purchasing power of the dollar associated with recent inflation, the true quantity of goods and services purchased by travelers increased $180.7 million.

Current and Inflation-Adjusted Direct Travel Spending



In 2025, travel spending increased $232.1 million or 3.8% in current dollars, but only $180.7 million or 2.9% in inflation-adjusted dollars.

Sources: Dean Runyan Associates, U.S. Bureau of Labor Statistics CPI
Note: Inflation-Adjusted values are in 2025 dollars as of October 2026

Inflation is the **rate of increase** in prices of goods and services.

How does inflation affect the travel industry?

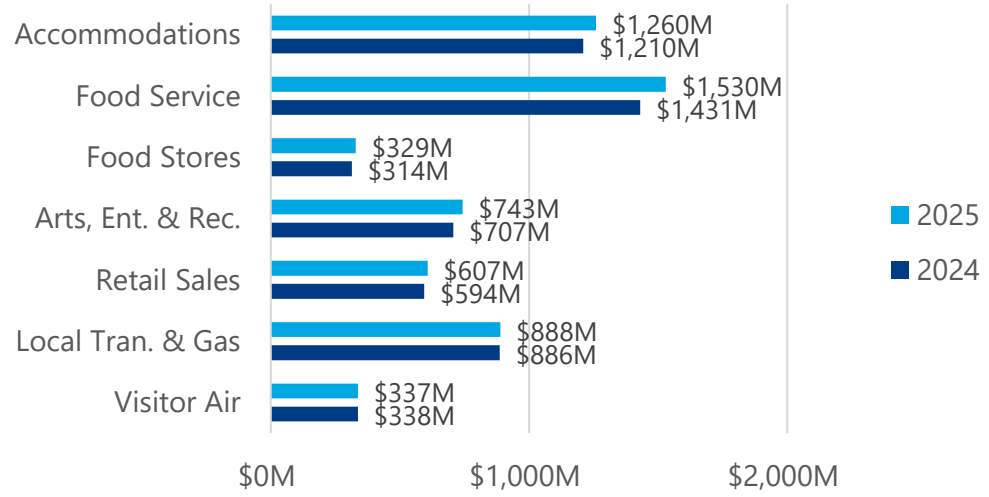
Inflation is the rate of increase in prices of goods and services. An increase in the rate of inflation translates into reduced purchasing power for consumers. To track the quantity of goods and services that consumers purchase when they travel, we report the "Inflation Adjusted" travel spending in the chart to the left. This is also known as "real" spending, as it shows the quantity of goods and services that were purchased while keeping the purchasing power constant across time.

U.S. CPI (annual % chg.)
2024: 2.62%
2025: 2.63%
Target: 2% Annually

Idaho Travel Impacts

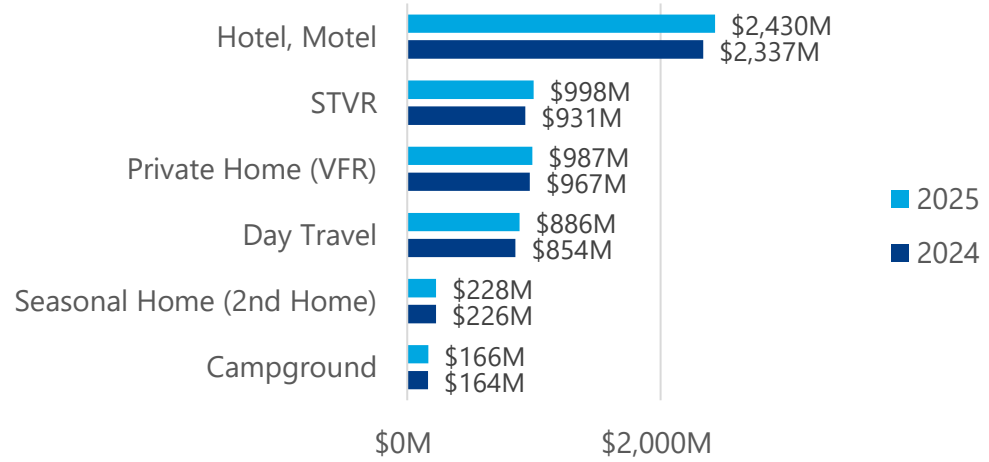
Direct Visitor Spending

Direct Visitor Spending by Commodity Purchased



Spending on accommodations grew to $1.3 billion in 2025, **an increase of 4.2%.** Spending on food service generated $1.5 billion, **an increase of 6.9%.**

Direct Visitor Spending by Accommodation Type



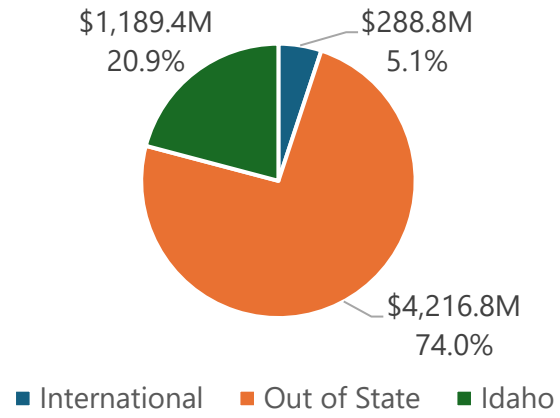
Visitors who stayed in a hotel, motel, or short-term vacation rental (STVR) spent a combined $3.4 billion in 2025, an **increase of 4.9%** compared to 2024.

Sources: Dean Runyan Associates, Omnitrak Group, Energy Information Administration, Bureau of Labor Statistics CPI, STR
Note: Percent change calculated on unrounded figures.

Idaho Travel Impacts

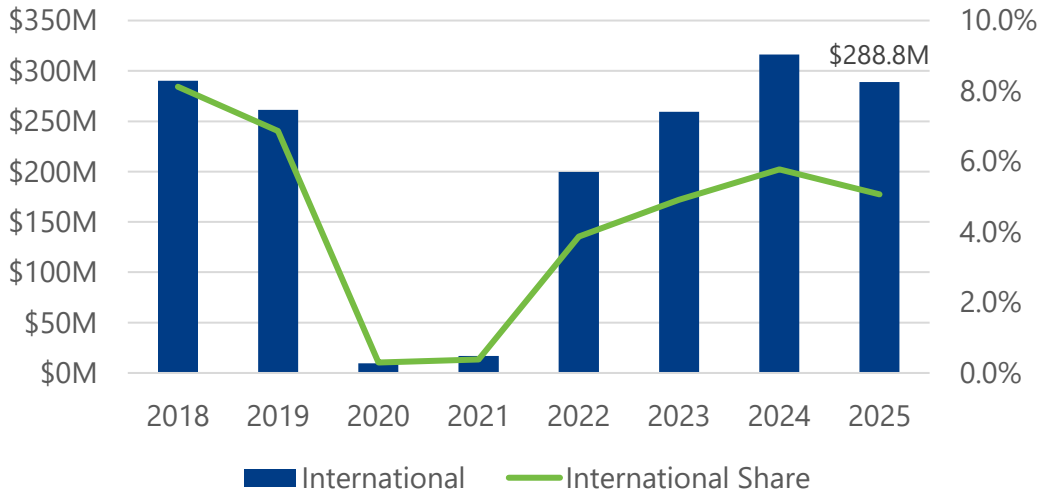
Direct Travel Spending

Visitor Spending by Origin, 2025p



In 2025, **most (74.0%) of Idaho's visitor spending was generated by visitors from other U.S. states**, 20.9% was generated by Idaho residents, and 5.1% was generated by international travelers.

International Visitor Spending



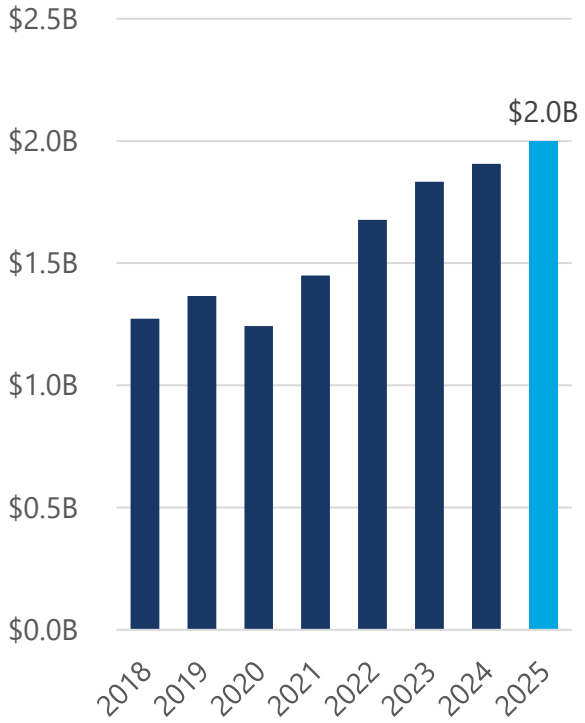
International visitors spent $288.8 million in 2025, **down 8.7%** compared to the previous year. International visitors contributed 5.1% of visitors spending overall.

Sources: U.S. Bureau of Economic Analysis, U.S. Office of Travel and Tourism, Dean Runyan Associates

Idaho Travel Impacts

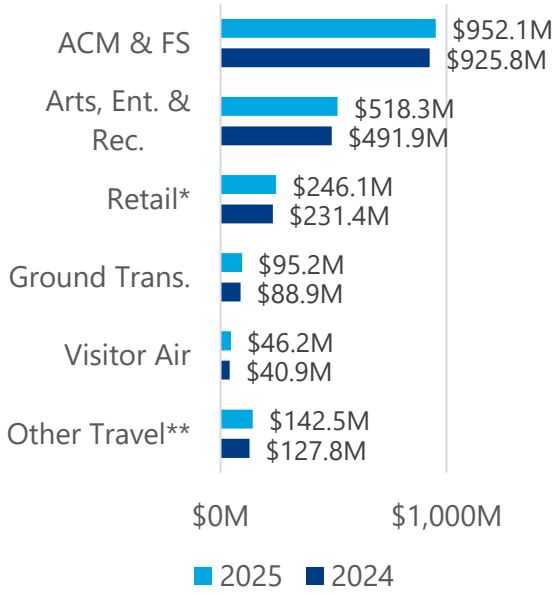
Direct Travel-Generated Earnings

Direct travel-generated earnings increased by $93.9 million in 2025.



Direct travel-generated earnings grew from $1.9 billion in 2024 to $2.0 billion in 2025, an increase of $93.9 million or 4.9%.

Travel industry earnings grew across all industry groups in 2025.



*Retail includes gasoline stations.
**Other travel includes travel arrangement and convention services.

Accommodation & Food Services (ACM & FS) earnings reached $952.1 million, contributing 47.6% of earnings state-wide.

Revenue - Cost of Goods Sold - Expenses - Sales Tax
=
Earnings

What are direct travel-generated earnings?

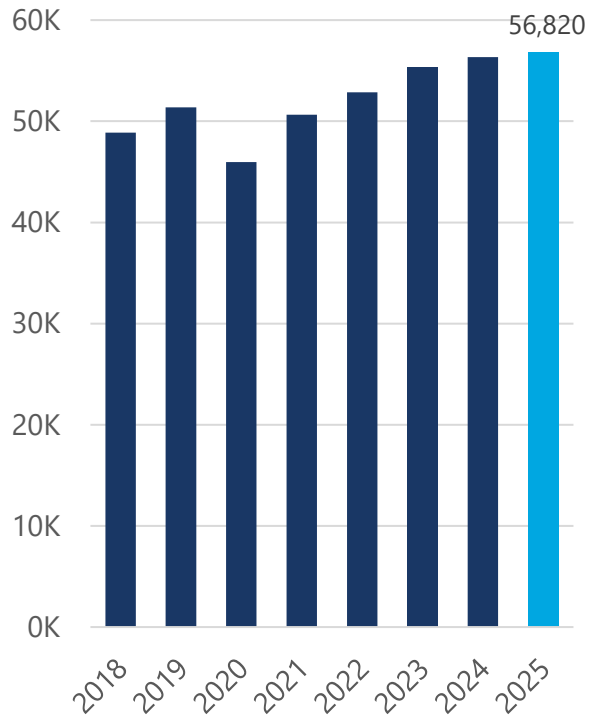
Direct travel-generated earnings represent the total after-point of sale tax income from travel spending. It includes wage and salary disbursements, proprietor income, and other earned income or benefits.

Earnings are an important measure of the benefit of the travel industry that flow to proprietors and employees. Because the travel industry is highly labor intensive, much of visitor-generated earnings flow to workers in the form of wages as opposed to owners of capital and intellectual property assets.

Idaho Travel Impacts

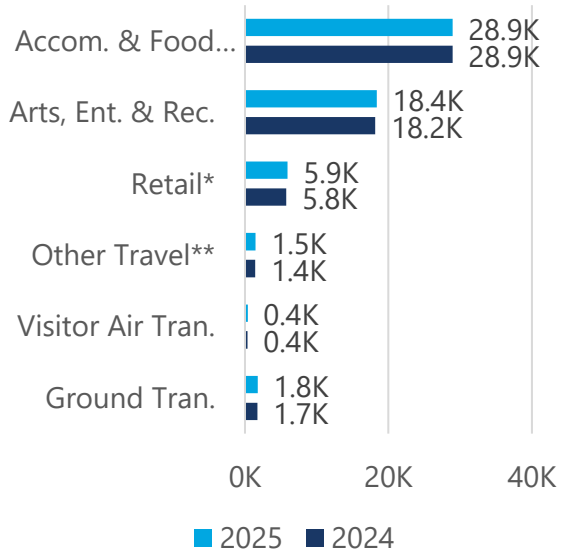
Direct Travel-Generated Employment

Direct travel-generated employment increased by 470 jobs in 2025.



Direct travel-generated employment grew from 56,350 to 56,820 jobs in 2025, a 0.8% increase from the prior year.

Direct travel-generated employment in the Arts, Ent. & Rec. sector increased 1.2% in 2025.



*Retail includes gasoline stations.
**Other travel includes travel arrangement and convention services.

Employment in the Accommodations and Food Services (ACM & FS) sector totaled 28,930 in 2025, roughly the same as 2024. Arts, Entertainment, and Recreation grew by 1.2%, gaining 210 jobs.

In 2025, every **$1 million** in direct **travel-related spending** resulted in **9 jobs** for the industry.

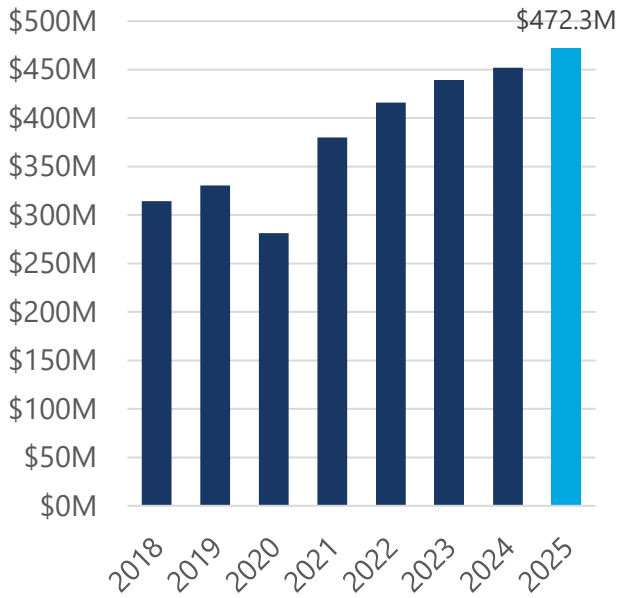
What is direct travel-generated employment?

Direct travel-generated employment refers to the total number of full and part-time jobs directly attributable to travel spending. A significant share of many industries' earnings come from visitor-related spending. Part of these earnings are used to pay employees in the form of income and benefits. Based on average salaries for employees in the various travel-related industries in Idaho, a total employment number attributable to travel can be reached. Employment figures reflect an annual average level of employment.

Idaho Travel Impacts

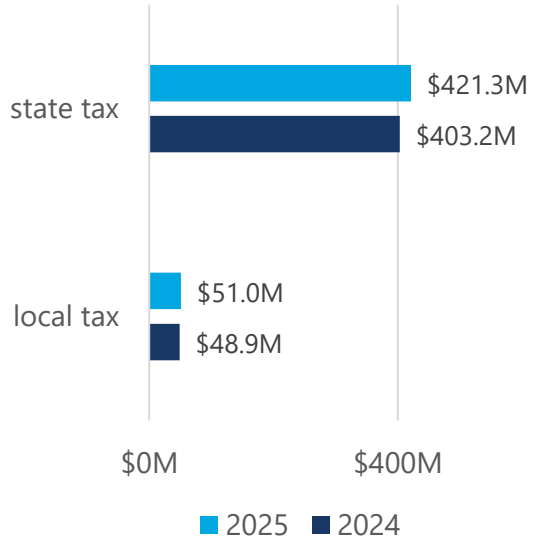
Direct Tax Revenue

Direct travel-generated tax revenue increased by $20.3 million in 2025.



Direct travel-generated tax revenue reached $472.3 million in 2025, an increase of $20.3 million or 4.5% from 2024.

Direct travel-generated tax revenue increased across state and local sources.



State and local travel-generated tax revenue both increased in 2025. State tax revenue increased from $403.2 million to $421.3 million, while local tax revenue increased from $48.9 million to $51.0 million.

State tax + Local tax
=
Tax Revenue

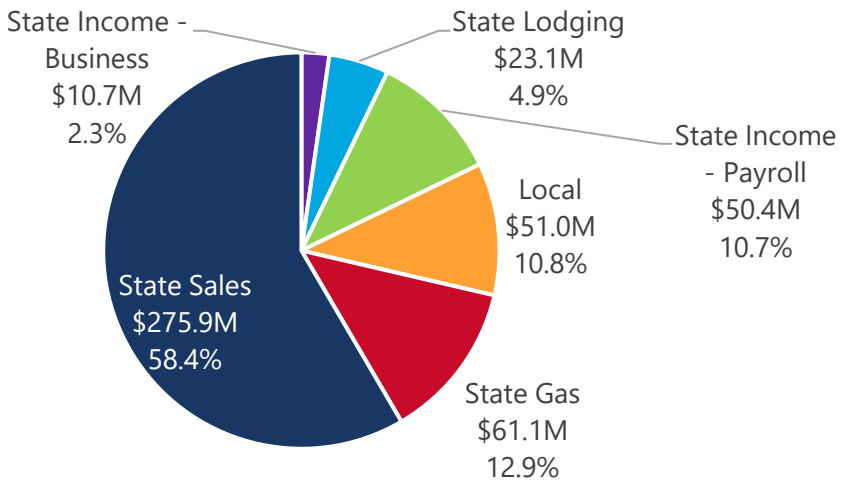
What is direct travel-generated tax revenue?

Direct travel-generated tax revenue includes state and local tax revenue generated from visitor spending. **State taxes** primarily include lodging taxes, motor fuel taxes, income, and sales taxes. **Local taxes** primarily take the form of sales taxes imposed by cities, counties, and other tax jurisdictions in Idaho. They also include a share of property taxes paid by travel industry business and employees.

Idaho Travel Impacts

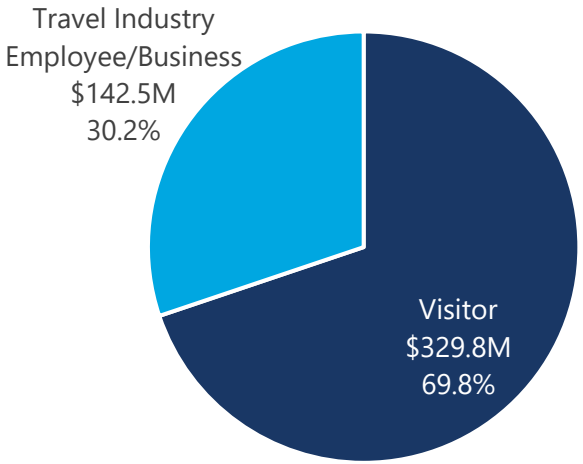
Direct Tax Revenue

Local and State Tax by Tax Type, 2025p



The majority (58.4%) of Idaho's travel-generated direct tax revenue generated from state sales taxes.

Local and State Tax by Taxpayer, 2025p

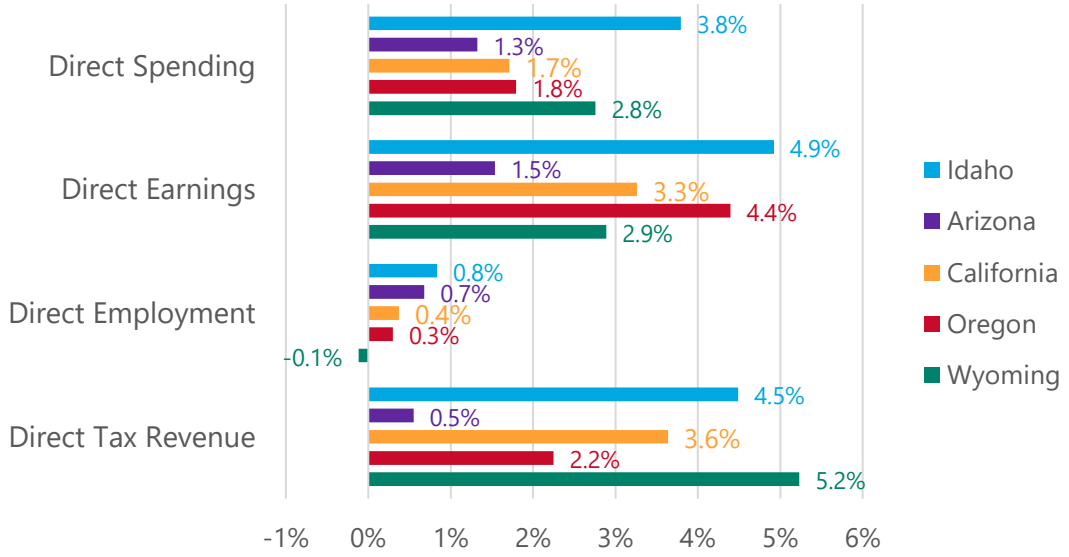


Visitors paid $329.8 million or 70% of local and state tax revenue generated by travel.

Idaho Travel Impacts

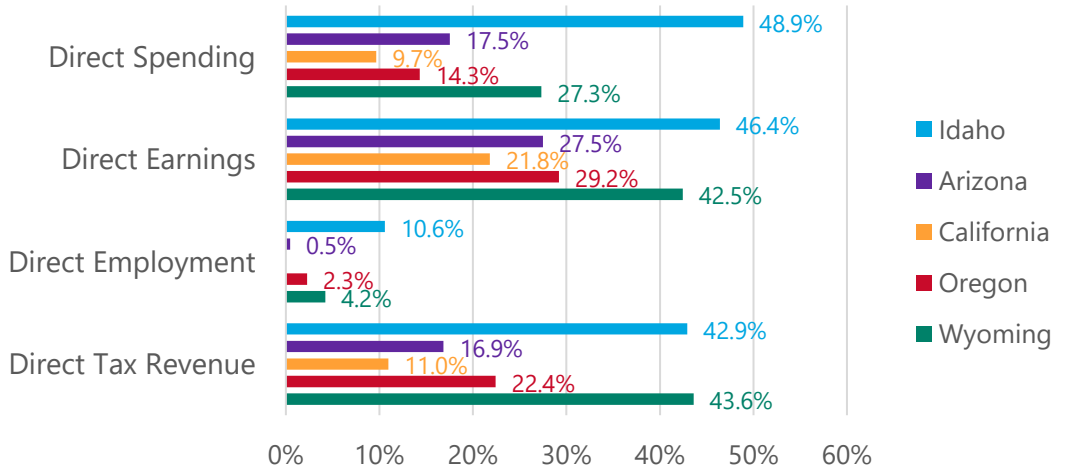
Comparing Idaho's Direct Travel Impacts to Other States

Percent Change of Direct Travel Impacts, 2024-2025p



Between 2024 and 2025, Idaho saw the strongest growth in travel spending and earnings among comparison states.

Percent Change of Direct Travel Impacts, 2019-2025p



Since 2019, Idaho's direct travel impacts have grown faster than most comparable states.

Idaho Travel Impacts

Comparing Idaho's Direct Travel Impacts to Other States

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Travel Spending ($Billions)										
Idaho	4.0	4.3	3.5	4.8	5.7	5.8	6.1	6.3	3.8%	6.9%
Arizona	24.4	25.6	14.9	23.6	28.1	29.3	29.7	30.1	1.3%	3.0%
California	140.3	144.9	68.3	105.0	142.3	151.1	156.2	158.9	1.7%	1.8%
Oregon	12.3	12.8	6.6	10.9	14.0	14.2	14.4	14.7	1.8%	2.5%
Wyoming	3.8	4.0	3.1	4.3	4.5	4.8	4.9	5.0	2.8%	4.1%
Direct Employment (Thousands of Jobs)										
Idaho	48.9	51.4	46.0	50.6	52.9	55.4	56.4	56.8	0.8%	2.2%
Arizona	192.3	194.3	156.7	165.5	178.0	187.8	193.9	195.2	0.7%	0.2%
California	1,163.0	1,176.8	871.3	932.4	1,090.5	1,143.0	1,163.1	1,167.5	0.4%	0.1%
Oregon	116.0	118.5	93.8	100.5	116.1	120.5	120.8	121.2	0.3%	0.6%
Wyoming	32.2	32.6	28.7	31.2	32.6	33.4	34.0	33.9	-0.1%	0.8%
Direct Earnings ($Billions)										
Idaho	1.3	1.4	1.2	1.4	1.7	1.8	1.9	2.0	4.9%	6.7%
Arizona	7.4	7.7	6.3	6.8	7.8	8.7	9.6	9.8	1.5%	4.1%
California	52.3	54.7	41.3	45.7	55.2	60.9	64.6	66.7	3.3%	3.5%
Oregon	3.6	3.8	3.1	3.4	4.2	4.5	4.7	4.9	4.4%	4.7%
Wyoming	1.0	1.0	0.9	1.1	1.2	1.3	1.4	1.5	2.9%	5.9%
Direct Tax Revenue ($Billions)										
Idaho	0.3	0.3	0.3	0.4	0.4	0.4	0.5	0.5	4.5%	6.0%
Arizona	2.1	2.2	1.5	2.1	2.3	2.5	2.5	2.5	0.5%	2.5%
California	11.8	12.3	7.4	10.1	12.2	12.2	13.2	13.6	3.6%	2.1%
Oregon	0.6	0.6	0.4	0.6	0.7	0.7	0.7	0.7	2.2%	3.5%
Wyoming	0.2	0.2	0.2	0.2	0.2	0.3	0.3	0.3	5.2%	5.8%

Idaho Travel Impacts

Historical Trend of Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	3,573.6	3,804.1	3,266.0	4,416.3	5,165.1	5,274.6	5,479.1	5,695.0	3.9%	6.9%
Transportation	851.7	877.7	604.6	938.0	1,277.9	1,207.6	1,224.1	1,225.5	0.1%	5.3%
Non-transportation	2,721.9	2,926.4	2,661.4	3,478.3	3,887.2	4,066.9	4,255.0	4,469.4	5.0%	7.3%
Other travel*	405.5	457.7	214.4	366.7	537.9	555.9	635.4	651.6	2.6%	7.0%
Total	**3,979.2**	**4,261.8**	**3,480.4**	**4,783.0**	**5,703.0**	**5,830.5**	**6,114.5**	**6,346.6**	**3.8%**	**6.9%**
Direct Earnings ($Millions)										
Earnings	1,272.9	1,366.3	1,242.5	1,450.0	1,677.5	1,833.0	1,906.6	2,000.5	4.9%	6.7%
Direct Employment (Jobs)										
Employment	48,890	51,380	45,960	50,640	52,850	55,360	56,350	56,820	0.8%	2.2%
Direct Tax Revenue ($Millions)										
Local	42.9	43.6	32.2	45.8	48.1	52.1	48.9	51.0	4.4%	2.5%
State	271.4	286.8	249.1	334.2	367.7	386.4	403.2	421.3	4.5%	6.5%
Total	**314.3**	**330.4**	**281.3**	**380.0**	**415.8**	**438.6**	**452.0**	**472.3**	**4.5%**	**6.0%**

Source: Dean Runyan Associates
Notes: Earnings include wage and salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors. Employment rounded to the nearest 10. Percent change calculated on unrounded figures.
*Other travel spending includes resident air travel, travel arrangement, and convention/trade shows.
**Compound annual growth rate

Idaho Travel Impacts

Historical Trend of Direct Spending

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	3,573.6	3,804.1	3,266.0	4,416.3	5,165.1	5,274.6	5,479.1	5,695.0	3.9%	6.9%
Other travel*	405.5	457.7	214.4	366.7	537.9	555.9	635.4	651.6	2.6%	7.0%
Total	**3,979.2**	**4,261.8**	**3,480.4**	**4,783.0**	**5,703.0**	**5,830.5**	**6,114.5**	**6,346.6**	**3.8%**	**6.9%**
Direct Visitor Spending by Type of Traveler Accommodation ($Millions)										
Hotel, Motel, STVR	1,993.0	2,155.4	1,784.5	2,587.3	3,043.5	3,125.4	3,267.5	3,427.7	4.9%	8.1%
Hotel, Motel	1,617.4	1,690.0	1,282.1	1,902.3	2,183.5	2,209.3	2,336.6	2,429.7	4.0%	6.0%
STVR	375.6	465.4	502.4	684.9	859.9	916.1	931.0	998.0	7.2%	15.0%
Campground	133.0	135.6	134.6	147.8	164.5	163.5	163.9	166.2	1.4%	3.2%
Private Home (VFR)	679.9	711.0	591.6	765.7	933.8	935.1	967.0	987.4	2.1%	5.5%
Seasonal Home (2nd Home)	169.7	174.0	178.5	200.4	221.3	224.0	226.4	228.0	0.7%	4.3%
Day Travel	597.9	628.1	576.9	715.1	802.1	826.5	854.2	885.6	3.7%	5.8%
Total	**3,573.6**	**3,804.1**	**3,266.0**	**4,416.3**	**5,165.1**	**5,274.6**	**5,479.1**	**5,695.0**	**3.9%**	**6.9%**
Direct Visitor Spending by Commodity Purchased ($Millions)										
Accommodations	705.3	770.1	645.7	974.4	1,126.1	1,162.8	1,209.7	1,260.1	4.2%	8.6%
Food Service	873.4	947.3	889.1	1,109.1	1,233.8	1,331.0	1,430.7	1,529.7	6.9%	8.3%
Food Stores	202.5	215.6	212.7	247.3	286.3	303.8	314.0	329.4	4.9%	7.2%
Arts, Ent. & Rec.	487.7	520.2	473.9	614.6	657.8	683.0	706.6	743.0	5.1%	6.2%
Retail Sales	453.0	473.2	440.0	532.9	583.3	586.3	593.9	607.2	2.2%	4.3%
Visitor Air	229.9	250.3	105.0	191.9	308.3	294.4	337.7	337.2	-0.2%	5.6%
Local Tran. & Gas	621.8	627.4	499.6	746.0	969.6	913.2	886.4	888.4	0.2%	5.2%
Total	**3,573.6**	**3,804.1**	**3,266.0**	**4,416.3**	**5,165.1**	**5,274.6**	**5,479.1**	**5,695.0**	**3.9%**	**6.9%**

Source: Dean Runyan Associates
Note: Details may not add to totals due to rounding. Percent change calculated on unrounded figures.
*Other travel spending includes resident air travel, travel arrangement, and convention/trade shows.
**Compound annual growth rate

Idaho Travel Impacts

Historical Trend of Direct Impacts Generated by Travel Spending

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Earnings ($Millions)										
Accom. & Food Serv.	586.9	641.2	597.0	722.5	830.6	890.1	925.8	952.1	2.8%	7.2%
Arts, Ent. & Rec.	321.9	342.4	314.0	379.4	425.2	475.9	491.9	518.3	5.4%	7.0%
Retail*	152.6	157.7	168.3	186.9	213.6	227.1	231.4	246.1	6.4%	7.1%
Ground Trans.	53.0	57.2	45.8	56.5	69.8	82.1	88.9	95.2	7.1%	8.7%
Visitor Air	53.4	54.0	41.4	27.5	34.9	39.4	40.9	46.2	13.0%	-2.1%
Other travel**	105.1	113.8	76.0	77.2	103.5	118.4	127.8	142.5	11.5%	4.4%
Total	**1,272.9**	**1,366.3**	**1,242.5**	**1,450.0**	**1,677.5**	**1,833.0**	**1,906.6**	**2,000.5**	**4.9%**	**6.7%**
Direct Employment (Jobs)										
Accom. & Food Serv.	25,230	26,660	23,790	26,360	27,770	28,730	28,940	28,930	0.0%	2.0%
Arts, Ent. & Rec.	14,650	15,590	13,970	15,890	16,620	17,590	18,150	18,360	1.2%	3.3%
Retail*	5,400	5,430	5,520	5,810	5,530	5,750	5,760	5,920	2.6%	1.3%
Ground Trans.	1,650	1,670	1,260	1,390	1,460	1,600	1,730	1,770	2.3%	1.0%
Visitor Air	500	500	380	210	290	330	360	380	5.3%	-4.1%
Other travel**	1,460	1,520	1,050	970	1,180	1,350	1,410	1,480	4.5%	0.1%
Total	**48,890**	**51,380**	**45,960**	**50,640**	**52,850**	**55,360**	**56,350**	**56,820**	**0.8%**	**2.2%**
Direct Tax Revenue ($Millions)										
Local Tax	42.9	43.6	32.2	45.8	48.1	52.1	48.9	51.0	4.4%	2.5%
State Tax	271.4	286.8	249.1	334.2	367.7	386.4	403.2	421.3	4.5%	6.5%
Total	**314.3**	**330.4**	**281.3**	**380.0**	**415.8**	**438.6**	**452.0**	**472.3**	**4.5%**	**6.0%**

Source: Dean Runyan Associates

Note: Earnings include wage and salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors. Employment rounded to the nearest 10. Percent change calculated on unrounded figures.

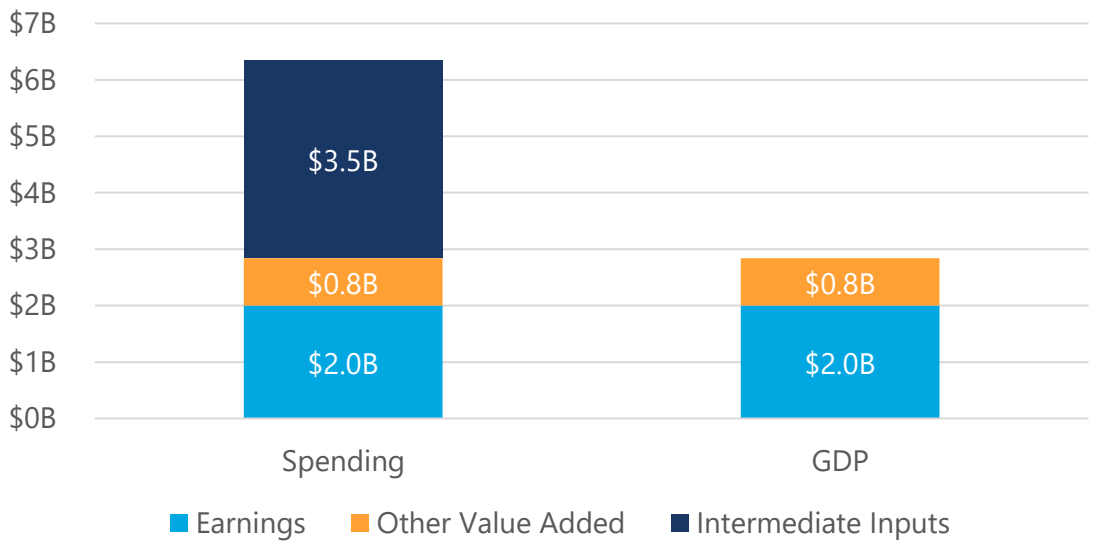
*Retail includes gasoline.

**Other travel includes resident air travel, travel arrangement and convention services.

Idaho Travel Impacts

GDP of the Travel Industry

Direct Travel Spending and GDP of Travel Industry



Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis
Note: The estimates represent only the direct impacts of travel spending. A portion of the inputs purchased by travel businesses in Idaho will be delivered by other Idaho firms that are not strictly part of the travel industry. Restaurants, for example, will purchase agricultural products from other Idaho businesses. These inputs are sometimes referred to as "indirect" effects.

Idaho travel industry GDP of $2.8 billion represents approximately 2.1% of the total Idaho GDP.

The travel Industry contributed $2.8B to Idaho's GDP.

What is Gross Domestic Product (GDP)?

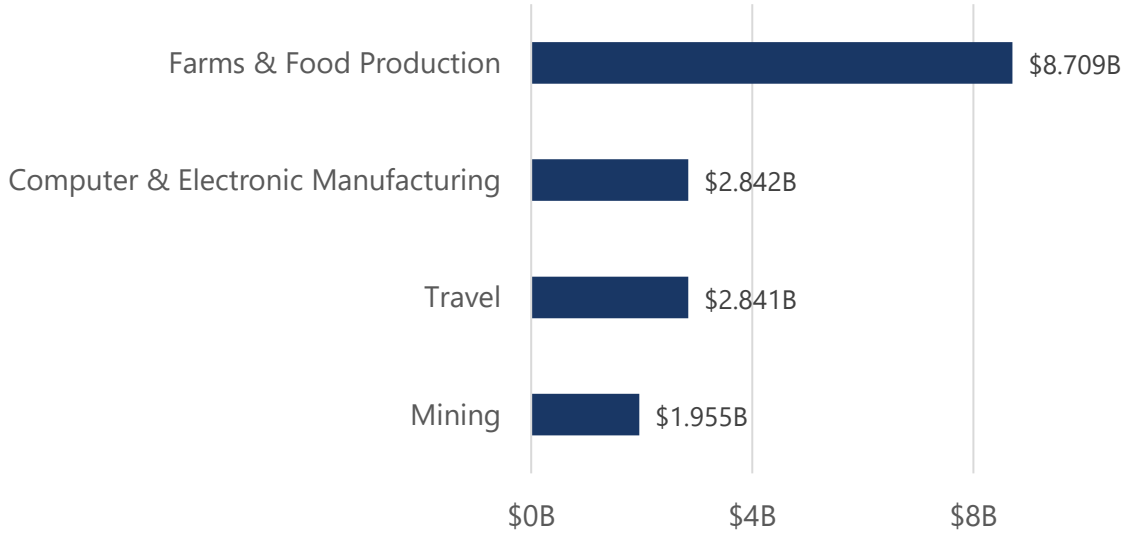
Gross Domestic Product (GDP, also referred to as value-added) is a measure of economic activity that reflects the market value of the labor and capital used to produce goods and services. The GDP for a particular industry within a state excludes the intermediate inputs purchased by businesses from other firms in the production process. It includes payments to individuals in the form of earnings, indirect business taxes to government, and other payments to individuals and corporations.

Idaho Travel Impacts

GDP of the Travel Industry

The travel industry is considered an export-oriented industry because goods and services are sold to visitors, injecting money into the local economy, as do the exports of other industries.

GDP of Export-Oriented Industries in Idaho, 2025p



Travel generated **$2.8 billion in GDP** in 2025, on par with Computer & Electronic Manufacturing, and has grown far faster since 2018 (+57% vs. −5%)

Sources: Dean Runyan Associates, U.S. Bureau of Economic Analysis

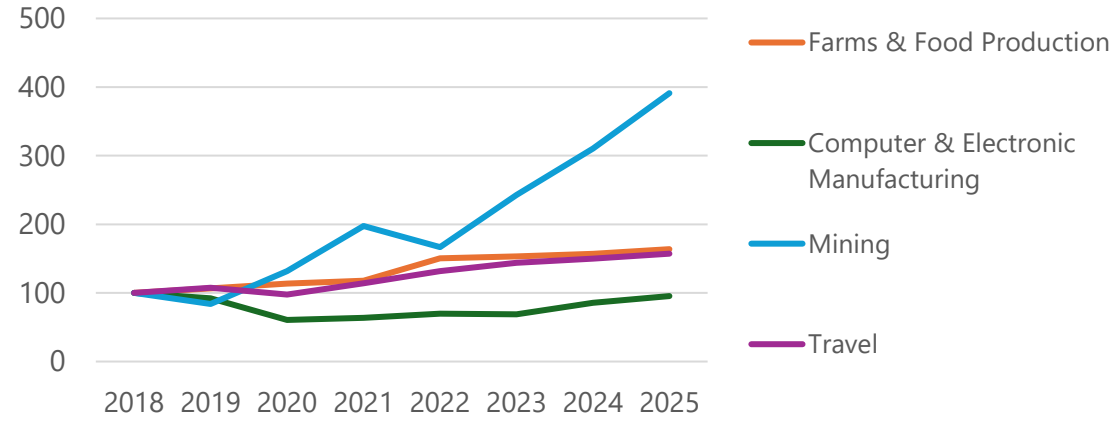
Farms & Food Production is Idaho's largest export-oriented industry

Export-oriented industries are industries that primarily market their products and services to other regions, states, or nations. Agriculture, extractive industries such as mining, and manufacturing are the best examples of goods-producing export industries. The travel industry is also an export-oriented industry because goods and services are sold to visitors, injecting money into the local economy, as do the exports of other industries. Exports are not necessarily more important than locally traded goods and services. However, diverse export-oriented industries in any economy are a source of strength - in part because they generate income that contributes to development of other local services and amenities.

Idaho Travel Impacts

GDP of the Travel Industry

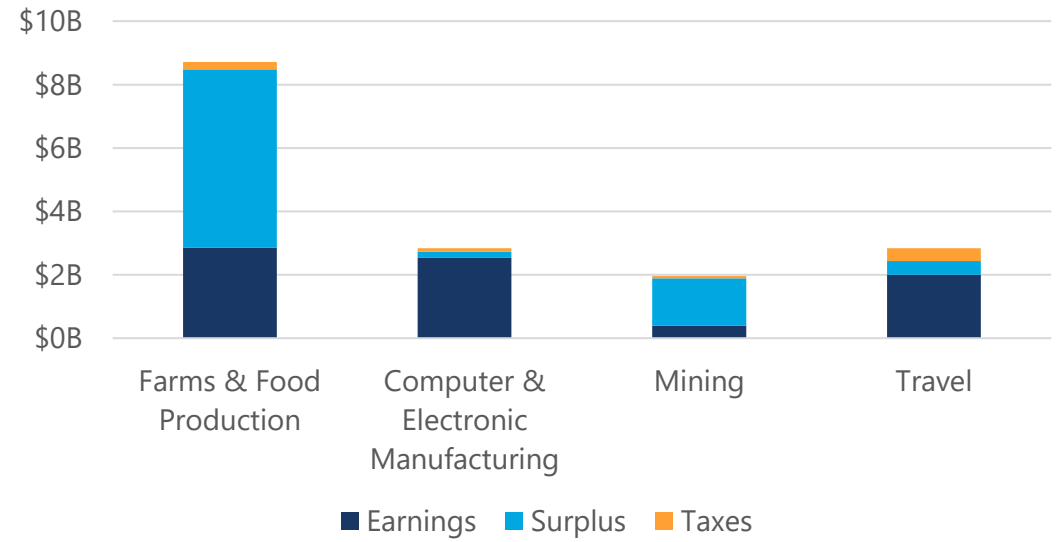
Change in GDP of Idaho's Export Industries, 2018-2025p



Note: Index 2018=100

In 2025, Idaho's travel industry GDP showed moderate gains to the historical rate of change since 2018.

Composition of Export Industries GDP, 2025p



Most (70.4%) of Idaho's travel industry GDP is attributable to earnings.

Idaho Travel Impacts

Total Visitor Impacts

The total visitor impacts, which include direct and secondary earnings and employment attributable to travel spending, are presented in thirteen major industry groups. These industry groups are similar, but not identical to the business categories used to report the direct impacts in this report. The largest secondary impact industries are reported below.

- **Professional Services** (Secondary impacts include 4.3 thousand jobs and $312.3 million in earnings) A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses. Employees of these businesses also purchase professional services.

- **Education and Health Services** (Secondary impacts include 2.5 thousand jobs, and $198.3 million in earnings) The secondary effects are primarily induced, such as employees of travel-related businesses use of medical services.

- **Financial Activities** (Secondary impacts include 3.5 thousand jobs, and $168.4 million in earnings) Both businesses and individuals make use of banking and insurance institutions.

- **Trade** (Secondary impacts include 2.7 thousand jobs and $181.4 million in earnings) Includes business-to-business purchases and employee household spending generated by travel-related economic activity.

Note: The total impacts reported here only reflect the impacts attributable to travel-related spending. The indirect and induced impact estimates reported here apply to the entire state and do not necessarily reflect economic patterns for individual counties. In general, geographic areas with lower levels of economic activity will have smaller secondary impacts within those same geographic boundaries.



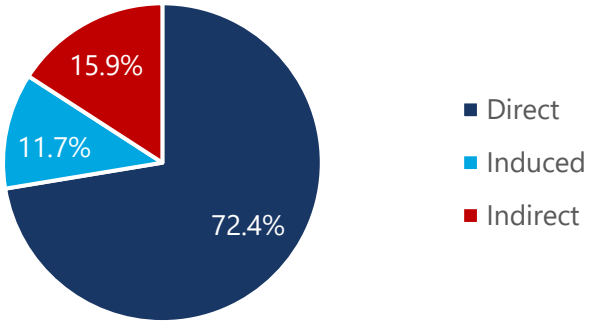
Indirect and induced impacts are the two categories of secondary economic impacts.

What are secondary impacts?

Secondary impacts are the result of re-spending of travel-related revenues. **Indirect** impacts represent effects associated with industries that supply goods and services to the direct businesses. **Induced** impacts represent effects of purchases made by employees in both the direct and indirect businesses.

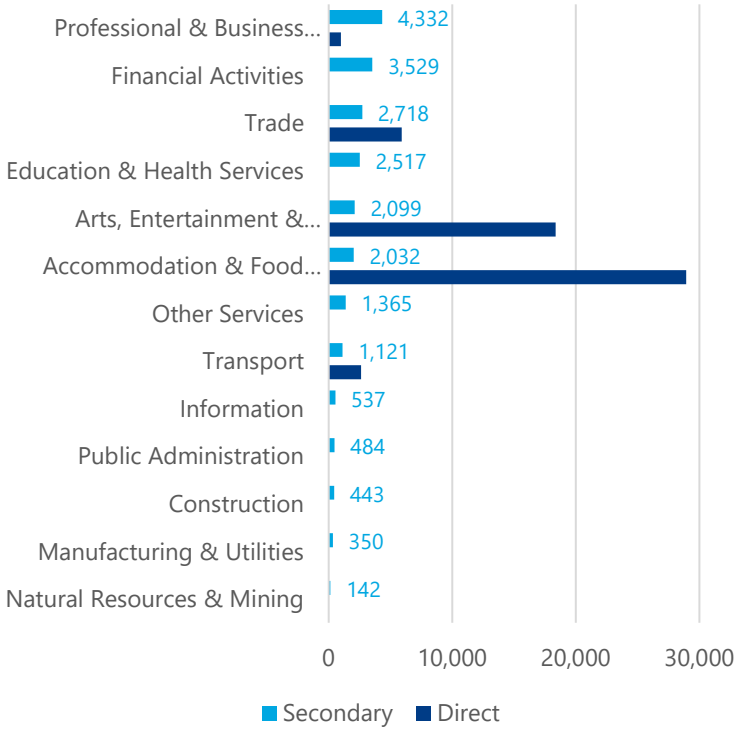
Idaho Travel Impacts

Total Employment, 2025p



In 2025, 27.6% of total employment was secondary. Secondary spending supported **4,332 jobs in the Professional and Business Services industry group.**

Total Employment by Industry Group, 2025p

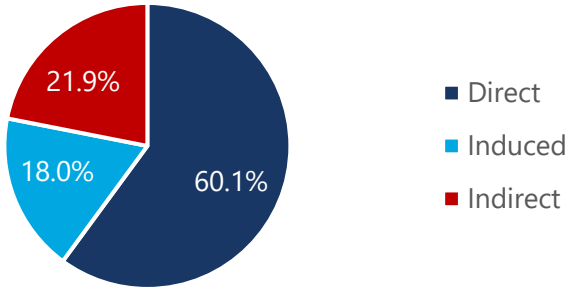


		Secondary			
Industry Group	**Direct**	**Indirect**	**Induced**	**Total**	**Grand Total**
Accommodation & Food Services	28,932	796	1,236	2,032	30,964
Arts, Entertainment & Recreation	18,355	1,804	295	2,099	20,454
Trade	5,915	1,058	1,660	2,718	8,633
Professional & Business Services	1,000	3,447	885	4,332	5,332
Transport	2,620	908	212	1,121	3,741
Financial Activities	0	2,339	1,190	3,529	3,529
Education & Health Services	0	174	2,342	2,517	2,517
Other Services	0	498	867	1,365	1,365
Information	0	398	138	537	537
Public Administration	0	373	111	484	484
Construction	0	324	120	443	443
Manufacturing & Utilities	0	249	101	350	350
Natural Resources & Mining	0	87	55	142	142
All industries	**56,822**	**12,456**	**9,213**	**21,669**	**78,491**

Source: Dean Runyan Associates, IMPLAN

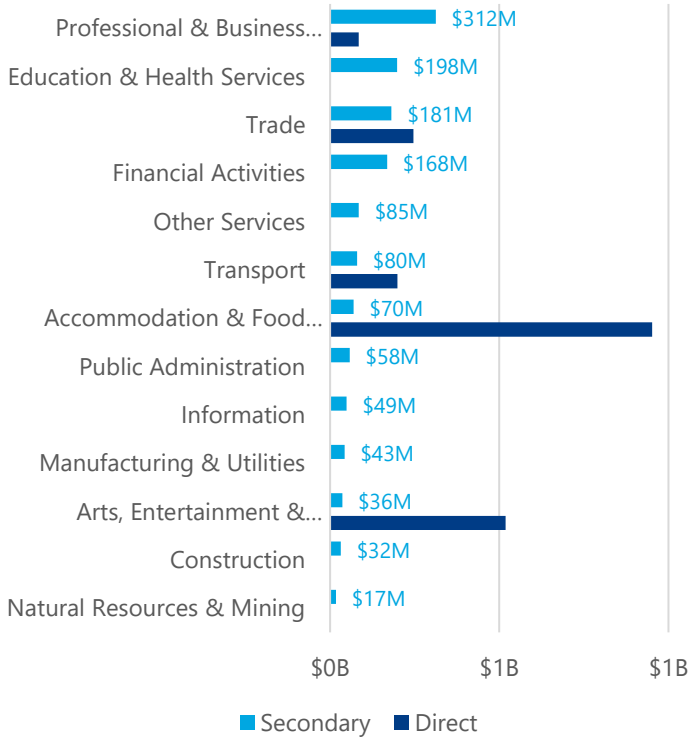
Idaho Travel Impacts

Total Earnings, 2025p



In 2025, 39.9% of total earnings were secondary. **Professional and Business Services industry group generated $312.3 million in secondary earnings,** which was highest among industry groups.

Total Earnings by Industry Group, 2025p



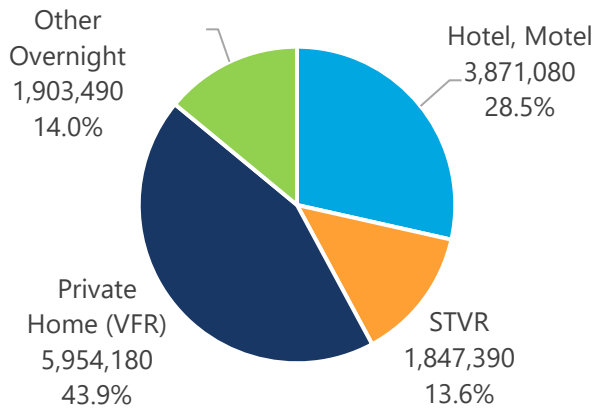
		Secondary			
Industry Group	Direct	Indirect	Induced	Total	Grand Total
Accommodation & Food Services	952.1	28.7	41.0	69.8	1,021.9
Arts, Entertainment & Recreation	518.3	28.4	7.6	36.0	554.3
Trade	246.1	69.3	112.2	181.4	427.6
Professional & Business Services	84.4	251.6	60.7	312.3	396.7
Transport	199.5	62.9	16.7	79.5	279.0
Financial Activities	0.0	101.1	67.3	168.4	168.4
Education & Health Services	0.0	5.7	192.6	198.3	198.3
Other Services	0.0	37.1	47.9	85.0	85.0
Information	0.0	36.2	12.8	49.0	49.0
Public Administration	0.0	45.4	12.7	58.2	58.2
Construction	0.0	23.0	8.5	31.6	31.6
Manufacturing & Utilities	0.0	30.1	12.6	42.6	42.6
Natural Resources & Mining	0.0	10.0	7.2	17.2	17.2
All industries	**2,000.5**	**729.4**	**599.8**	**1,329.2**	**3,329.7**

Source: Dean Runyan Associates, IMPLAN
Note: Figures reported in millions.

Idaho Travel Impacts

Overnight Visitor Volume

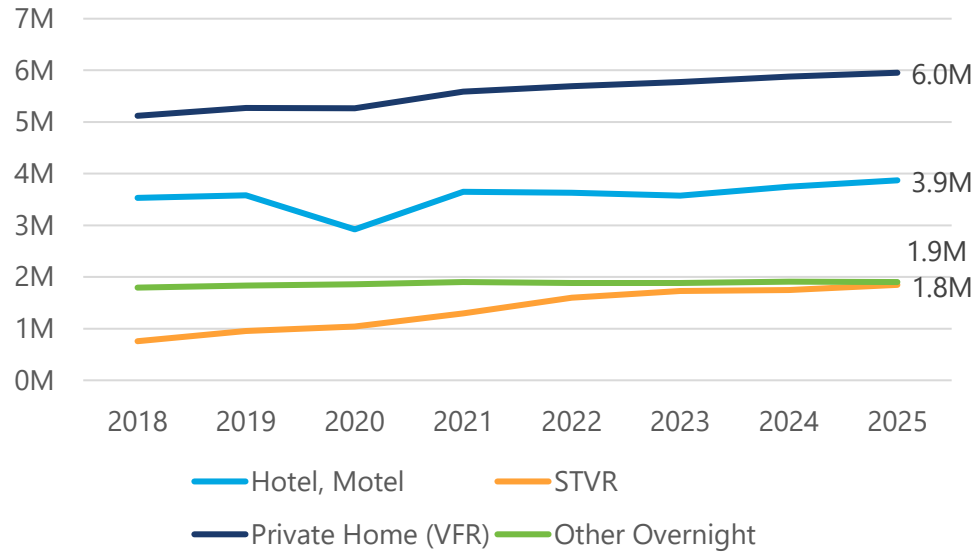
Overnight Visitor Volume by Accommodation Type, 2025



Source: Dean Runyan Associates

Idaho welcomed **13.6 million visitors in 2025, a 2.2% increase** compared to the previous year. Most visitors stayed in a private home (43.9%) followed by hotel, motel (28.5%).

Overnight Visitor Volume by Accommodation Type, 2018-2025



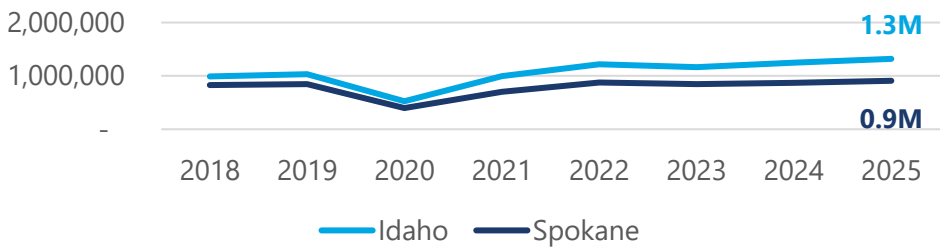
In 2025, the volume of visitors staying in a **short-term vacation rental (STVR) increased 5.7%**, which was the largest increase among accommodation categories.

Sources: Dean Runyan Associates, Omnitrak Group, Smith Travel Research
Note: STVR (short term vacation rental), Other includes seasonal home (2nd home) and camping.

Idaho Travel Impacts

Overnight Visitor Volume

Air Passenger Visitor Arrivals / U.S. Air Carriers



Approximately **1.3 million visitors arrived in Idaho via U.S. air travel** in 2025, a 6.0% increase compared to the previous year.

Sources: U.S. Bureau of Transportation Statistics, Dean Runyan Associates

Overnight Visitor Nights and Trips, 2023-2025

	Person			Party		
	2023	2024	2025	2023	2024	2025
Nights						
Hotel, Motel	9,699,020	10,180,860	10,512,520	4,047,950	4,250,510	4,381,730
STVR	4,808,490	4,858,920	5,135,750	1,393,770	1,408,380	1,488,620
Private Home (VFR)	20,774,660	21,143,680	21,434,610	8,047,380	8,191,120	8,305,560
Other Overnight	6,558,790	6,658,820	6,639,150	2,209,980	2,243,570	2,236,550
Total	**41,840,960**	**42,842,280**	**43,722,030**	**15,699,080**	**16,093,580**	**16,412,460**
Trips						
Hotel, Motel	3,572,870	3,750,580	3,871,080	1,491,040	1,565,710	1,613,410
STVR	1,729,670	1,747,810	1,847,390	501,360	506,610	535,480
Private Home (VFR)	5,772,220	5,876,500	5,954,180	2,218,310	2,258,550	2,288,820
Other Overnight	1,880,540	1,909,200	1,903,490	633,750	643,380	641,340
Total	**12,955,300**	**13,284,090**	**13,576,140**	**4,844,460**	**4,974,250**	**5,079,050**

Source: Dean Runyan Associates
Note: Figures rounded to the nearest 10. Other Overnight includes camping and Seasonal home (2nd home) stays.

Idaho Travel Impacts

Visitor Trip Details

In 2025, overnight visitors spent between $46 (Private Home VFR) and $231 (Hotel, Motel) per day. Visitors who stayed in a Short-Term Vacation Rental (STVR) had the largest average party size (3.5). The length of stay was longer for visitors staying in a Private Home (VFR) or Other Overnight (seasonal/2nd home, camping).

	Spending per Person		Spending per Party			
	Day	Trip	Day	Trip	Party Size	Length of Stay
Accommodation Type						
Hotel, Motel	$231	$628	$555	$1,506	2.4	2.7
STVR	$194	$540	$670	$1,864	3.5	2.8
Private Home (VFR)	$46	$166	$119	$431	2.6	3.6
Other Overnight	$59	$207	$176	$615	3.0	3.5
All Overnight	$110	$354	$293	$947	2.7	3.2

Source: Dean Runyan Associates



Photo by Petr Mitka

Regional Travel Impacts

2025p

Regional Travel Impacts

Idaho has seven tourism regions segmented by county boundaries. The counties within each tourism region are listed below.

Central



- Blaine
- Butte
- Custer
- Lemhi

Eastern



- Bonneville
- Clark
- Fremont
- Jefferson
- Madison
- Teton

North Central



- Clearwater
- Idaho
- Latah
- Lewis
- Nez Perce

Northern



- Benewah
- Bonner
- Boundary
- Kootenai
- Shoshone

South Central



- Camas
- Cassia
- Gooding
- Jerome
- Lincoln
- Minidoka
- Twin Falls

Southeastern



- Bannock
- Bear Lake
- Bingham
- Caribou
- Franklin
- Oneida
- Power

Southwestern



- Ada
- Adams
- Boise
- Canyon
- Elmore
- Gem
- Owyhee
- Payette
- Valley
- Washington

Regional Travel Impacts

Direct Travel Impacts

Summary of Direct Travel Impacts, 2025p

	Direct Spending					Direct Tax Revenue		
Region	Visitor	Other travel*	Total	Direct Earnings**	Direct Employment	Local	State	Total
Central	$587.5M	$22.1M	$609.6M	$249.5M	6,840	$10.0M	$43.6M	$53.7M
Eastern	$717.6M	$77.1M	$794.7M	$222.2M	7,320	$4.9M	$56.0M	$60.9M
North Central	$209.9M	$21.8M	$231.7M	$78.2M	2,790	$1.7M	$17.2M	$18.9M
Northern	$1,316.0M	$32.9M	$1,348.9M	$510.2M	13,310	$11.2M	$94.4M	$105.7M
South Central	$332.8M	$28.8M	$361.6M	$108.6M	3,830	$2.0M	$27.6M	$29.6M
Southeastern	$332.4M	$23.2M	$355.7M	$109.8M	4,040	$2.1M	$26.0M	$28.1M
Southwestern	$2,034.7M	$609.8M	$2,644.4M	$722.0M	18,700	$19.0M	$156.5M	$175.6M
Total	**$5,530.9M**	**$815.7M**	**$6,346.6M**	**$2,000.5M**	**56,820**	**$51.0M**	**$421.3M**	**$472.3M**

Source: Dean Runyan Associates
Note: The sum of regional Visitor Spending and Other Spending estimates differs from county and statewide estimates due to differences in the geographic classification of transportation spending. These differences offset one another, and Total Spending is consistent across all geographic levels. The sum of regional direct employment does not equal total direct employment due to rounding.
*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.
**Direct earnings include wage and salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors.

Regional Travel Impacts

Direct Travel Impacts

Summary of Direct Travel Impact Insights, 2025p

	Central	Eastern	North Central	Northern	South Central	Southeastern	Southwestern
Impact of Direct Visitor Spending							
Amount of Visitor Spending that supports 1 job*	$85,944	$98,078	$75,352	$98,868	$86,793	$82,244	$108,823
Employee Earnings generated by $100 of Visitor Spending	$42	$31	$37	$39	$33	$33	$35
Direct Tax Revenue generated by $100 of Visitor Spending	$9	$8	$9	$8	$9	$8	$9
Impact of Visitor Volume							
Annual visitor spending from 1 additional overnight visitor per resident household	$9.7M	$21.4M	$10.7M	$50.7M	$14.7M	$13.4M	$113.9M
Jobs supported by 1 additional overnight visitor per resident household	113	218	142	512	170	163	1,046
Impact of Travel Industry							
Travel Share of Total Employment	15%	5%	4%	8%	3%	4%	3%
Overnight Visitor Day Share**	20%	7%	5%	7%	5%	5%	5%
Share of Overnight Visitor Spending							
Hotel, Motel	39%	35%	48%	49%	46%	37%	43%
STVR	37%	29%	7%	19%	4%	7%	13%
Private home (VFR)	13%	14%	16%	9%	19%	18%	23%
Seasonal Home (2nd Home)	7%	4%	5%	4%	2%	4%	3%
Campground	2%	2%	5%	3%	4%	5%	2%
Day Travel	2%	17%	20%	15%	25%	29%	15%

Regional Travel Impacts

Central Region / Direct Travel Impact Insights, 2025p

	Region	State
Impact of Direct Visitor Spending		
Amount of Visitor Spending that supports 1 job*	$85,944	$100,225
Employee Earnings generated by $100 of Visitor Spending	$42	$35
Direct Tax Revenue generated by $100 of Visitor Spending	$9	$8
Impact of Visitor Volume		
Annual visitor spending from 1 additional overnight visitor per resident household	$9,676,758	$252,582,021
Jobs supported by 1 additional overnight visitor per resident household	113	2,520
Impact of Travel Industry		
Travel Share of Total Employment	15%	4%
Overnight Visitor Day Share**	19.7%	5.9%
Share of Overnight Visitor Spending		
Hotel, Motel	39%	43%
STVR	37%	18%
Private home (VFR)	13%	17%
Seasonal Home (2nd Home)	7%	4%
Campground	2%	3%
Day Travel	2%	16%

Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics
*Amount of visitor spending that supports 1 job does not include other travel spending.
**Annual overnight visitor days / (resident population * 365)

Regional Travel Impacts

Central / Travel Spending Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Spending ($Millions)										
Visitor	334.0	358.5	323.2	397.3	519.0	528.5	543.0	587.5	8.2%	8.4%
Other Travel*	11.5	12.4	5.1	9.2	16.0	17.9	20.2	22.1	9.6%	9.8%
Total	**345.4**	**370.9**	**328.3**	**406.5**	**535.0**	**546.4**	**563.2**	**609.6**	**8.2%**	**8.5%**
Visitor Spending by Type of Traveler Accommodation ($Millions)										
Hotel, Motel, STVR	238.6	258.9	228.9	286.1	391.9	397.1	407.2	445.9	9.5%	9.3%
Hotel, Motel	149.1	153.6	123.3	167.7	194.3	198.2	210.0	230.2	9.6%	6.4%
STVR	89.4	105.3	105.6	118.4	197.5	198.9	197.2	215.7	9.4%	13.4%
Campground	9.1	9.1	9.1	9.6	10.8	10.9	11.7	12.0	3.0%	4.1%
Private Home (VFR)	48.1	50.9	45.1	56.5	65.2	67.9	70.6	74.7	5.8%	6.5%
Seasonal Home (2nd Home)	30.4	31.2	32.0	35.8	39.9	41.0	41.5	42.3	2.0%	4.9%
Day Travel	7.9	8.3	8.1	9.3	11.2	11.7	12.0	12.6	5.1%	6.8%
Total	**334.0**	**358.5**	**323.2**	**397.3**	**519.0**	**528.5**	**543.0**	**587.5**	**8.2%**	**8.4%**
Visitor Spending by Commodity Purchased ($Millions)										
Accommodations	70.9	78.0	70.1	93.2	120.5	120.3	125.9	140.7	11.7%	10.3%
Food Service	78.5	85.4	82.0	95.9	123.9	130.7	136.8	148.4	8.5%	9.5%
Food Stores	13.5	14.6	14.6	16.3	22.6	23.3	23.5	24.9	6.3%	9.1%
Arts, Ent. & Rec.	109.6	116.6	105.9	122.7	159.4	163.2	164.5	175.8	6.9%	7.0%
Retail Sales	22.1	22.8	22.7	25.6	29.3	29.2	29.1	29.8	2.3%	4.4%
Visitor Air	18.3	19.7	9.9	18.9	28.2	28.8	31.6	35.9	13.3%	10.1%
Local Tran. & Gas	21.1	21.4	17.9	24.7	35.1	33.0	31.5	32.0	1.6%	6.1%
Total	**334.0**	**358.5**	**323.2**	**397.3**	**519.0**	**528.5**	**543.0**	**587.5**	**8.2%**	**8.4%**

Source: Dean Runyan Associates

Note: Percent change calculated on unrounded figures.

*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Idaho regions.

Regional Travel Impacts

Central / Direct Impact Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Travel Industry Earnings ($Millions)										
Accom. & Food Serv.	65.0	65.2	60.7	71.3	81.5	90.0	89.9	95.9	6.7%	5.7%
Arts, Ent. & Rec.	92.7	94.6	87.9	92.6	109.7	122.3	120.8	128.5	6.4%	4.8%
Retail*	5.9	6.1	6.9	7.3	9.3	9.9	10.4	10.7	3.4%	9.0%
Ground Trans.	2.4	2.6	2.2	2.5	3.4	4.0	4.6	5.1	10.2%	11.2%
Visitor Air	1.1	1.1	0.8	0.6	3.0	4.3	4.9	5.1	3.8%	24.8%
Other Travel**	1.6	1.7	1.3	1.6	2.5	3.3	4.0	4.1	3.4%	14.1%
Total	**168.7**	**171.4**	**159.9**	**175.8**	**209.3**	**233.9**	**234.5**	**249.5**	**6.4%**	**5.7%**
Direct Travel Industry Employment (Jobs)										
Accom. & Food Serv.	2,220	2,130	1,860	2,010	2,040	2,140	2,120	2,160	1.5%	-0.4%
Arts, Ent. & Rec.	3,470	3,920	3,650	3,500	3,740	3,970	4,200	4,230	0.6%	2.8%
Retail*	210	210	220	220	230	240	250	260	1.6%	3.1%
Ground Trans.	80	80	60	60	70	80	90	90	3.4%	2.6%
Visitor Air	20	30	20	10	30	40	50	40	-4.3%	9.0%
Other Travel**	60	70	50	60	60	60	70	60	-7.2%	0.0%
Total	**6,060**	**6,430**	**5,860**	**5,850**	**6,150**	**6,520**	**6,780**	**6,840**	**0.8%**	**1.7%**
Direct Tax Revenue Generated by Travel Spending ($Millions)										
Local Tax Revenue	7.5	7.5	6.0	8.0	9.1	9.7	9.3	10.0	8.2%	4.2%
State Tax Revenue	21.6	22.5	20.3	25.1	37.9	39.9	40.6	43.6	7.5%	10.6%
Total	**29.1**	**30.1**	**26.4**	**33.1**	**47.0**	**49.6**	**49.9**	**53.7**	**7.6%**	**9.2%**

Source: Dean Runyan Associates

Note: Employment rounded to the nearest 10. Percent change calculated with unrounded figures.

*Retail includes gasoline.

**Other travel includes resident air travel, travel arrangement, and convention/trade shows.

Regional Travel Impacts

Eastern Region / Direct Travel Impact Insights, 2025p

	Region	State
Impact of Direct Visitor Spending		
Amount of Visitor Spending that supports 1 job*	$98,078	$100,225
Employee Earnings generated by $100 of Visitor Spending	$31	$35
Direct Tax Revenue generated by $100 of Visitor Spending	$8	$8
Impact of Visitor Volume		
Annual visitor spending from 1 additional overnight visitor per resident household	$21,408,858	$252,582,021
Jobs supported by 1 additional overnight visitor per resident household	218	2,520
Impact of Travel Industry		
Travel Share of Total Employment	5%	4%
Overnight Visitor Day Share**	7.4%	5.9%
Share of Overnight Visitor Spending		
Hotel, Motel	35%	43%
STVR	29%	18%
Private home (VFR)	14%	17%
Seasonal Home (2nd Home)	4%	4%
Campground	2%	3%
Day Travel	17%	16%

Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics

*Amount of visitor spending that supports 1 job does not include other travel spending.

**Annual overnight visitor days / (resident population * 365)

Regional Travel Impacts

Eastern / Travel Spending Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Spending ($Millions)										
Visitor	385.7	415.6	371.4	540.5	615.0	638.0	677.0	717.6	6.0%	9.3%
Other Travel*	38.9	42.1	22.8	35.1	76.0	66.1	73.2	77.1	5.4%	10.2%
Total	**424.7**	**457.7**	**394.1**	**575.6**	**691.0**	**704.2**	**750.2**	**794.7**	**5.9%**	**9.4%**
Visitor Spending by Type of Traveler Accommodation ($Millions)										
Hotel, Motel, STVR	211.9	235.2	205.5	325.4	367.3	390.5	421.3	453.6	7.7%	11.5%
Hotel, Motel	155.2	159.3	116.3	173.9	211.4	220.0	235.5	248.6	5.6%	7.0%
STVR	56.7	75.9	89.2	151.4	156.0	170.5	185.7	205.0	10.4%	20.1%
Campground	14.2	14.3	14.2	15.2	17.0	16.9	17.1	17.0	-0.6%	2.7%
Private Home (VFR)	64.7	67.2	57.7	84.1	101.6	94.9	98.3	101.7	3.5%	6.7%
Seasonal Home (2nd Home)	18.5	18.7	19.2	21.0	25.3	25.6	25.9	25.8	-0.5%	4.9%
Day Travel	76.5	80.2	74.9	94.8	103.9	110.1	114.4	119.5	4.4%	6.6%
Total	**385.7**	**415.6**	**371.4**	**540.5**	**615.0**	**638.0**	**677.0**	**717.6**	**6.0%**	**9.3%**
Visitor Spending by Commodity Purchased ($Millions)										
Accommodations	102.2	115.6	105.6	174.7	191.0	203.2	218.5	233.6	6.9%	12.5%
Food Service	90.8	99.0	94.1	121.5	131.4	148.2	162.4	176.6	8.7%	10.0%
Food Stores	28.2	30.2	30.1	37.3	41.6	45.3	47.7	50.4	5.7%	8.6%
Arts, Ent. & Rec.	18.7	19.9	18.4	23.0	24.1	26.4	27.9	29.9	7.1%	6.9%
Retail Sales	60.1	62.7	59.1	72.6	78.3	81.0	82.8	85.2	2.9%	5.1%
Visitor Air	22.1	23.7	11.2	31.2	46.8	33.8	38.8	41.7	7.4%	9.5%
Local Tran. & Gas	63.5	64.6	52.7	80.2	101.8	100.0	99.0	100.4	1.4%	6.7%
Total	**385.7**	**415.6**	**371.4**	**540.5**	**615.0**	**638.0**	**677.0**	**717.6**	**6.0%**	**9.3%**

Source: Dean Runyan Associates

Note: Percent change calculated on unrounded figures.

*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Idaho regions.

Regional Travel Impacts

Eastern / Direct Impact Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Travel Industry Earnings ($Millions)										
Accom. & Food Serv.	75.8	84.3	82.6	102.5	117.9	126.3	132.5	133.4	0.7%	8.4%
Arts, Ent. & Rec.	15.0	14.2	11.9	13.2	16.9	19.0	19.4	18.7	-3.7%	3.2%
Retail*	16.0	16.7	18.2	21.0	27.0	27.8	30.6	33.1	8.1%	11.0%
Ground Trans.	6.2	6.7	5.6	7.3	8.8	10.1	10.9	11.6	6.2%	9.3%
Visitor Air	10.6	10.2	9.5	8.1	6.5	6.7	6.0	7.9	31.2%	-4.1%
Other Travel**	17.1	17.3	15.0	11.1	13.3	14.6	14.5	17.6	20.8%	0.4%
Total	**140.6**	**149.5**	**142.9**	**163.2**	**190.3**	**204.6**	**214.0**	**222.2**	**3.8%**	**6.8%**
Direct Travel Industry Employment (Jobs)										
Accom. & Food Serv.	3,480	3,770	3,480	3,980	4,220	4,380	4,470	4,470	-0.1%	3.7%
Arts, Ent. & Rec.	1,210	1,070	910	1,070	1,320	1,510	1,520	1,470	-3.1%	2.8%
Retail*	550	540	580	630	700	710	760	780	2.4%	5.2%
Ground Trans.	200	200	160	190	190	200	220	220	2.8%	1.7%
Visitor Air	80	80	70	50	60	60	60	70	21.1%	-1.9%
Other Travel**	350	350	310	310	270	270	280	310	10.0%	-1.6%
Total	**5,860**	**6,010**	**5,510**	**6,230**	**6,750**	**7,120**	**7,300**	**7,320**	**0.2%**	**3.2%**
Direct Tax Revenue Generated by Travel Spending ($Millions)										
Local Tax Revenue	4.1	4.1	3.2	4.6	4.8	5.0	4.7	4.9	5.0%	2.7%
State Tax Revenue	33.2	35.3	31.6	44.3	46.6	49.9	53.1	56.0	5.5%	7.8%
Total	**37.3**	**39.4**	**34.8**	**48.9**	**51.5**	**55.0**	**57.8**	**60.9**	**5.5%**	**7.3%**

Source: Dean Runyan Associates

Note: Employment rounded to the nearest 10. Percent change calculated with unrounded figures.

*Retail includes gasoline.

**Other travel includes resident air travel, travel arrangement, and convention/trade shows.

Regional Travel Impacts

North Central Region / Direct Travel Impact Insights, 2025p

	Region	State
Impact of Direct Visitor Spending		
Amount of Visitor Spending that supports 1 job*	$75,352	$100,225
Employee Earnings generated by $100 of Visitor Spending	$37	$35
Direct Tax Revenue generated by $100 of Visitor Spending	$9	$8
Impact of Visitor Volume		
Annual visitor spending from 1 additional overnight visitor per resident household	$10,736,852	$252,582,021
Jobs supported by 1 additional overnight visitor per resident household	142	2,520
Impact of Travel Industry		
Travel Share of Total Employment	4%	4%
Overnight Visitor Day Share**	5.4%	5.9%
Share of Overnight Visitor Spending		
Hotel, Motel	48%	43%
STVR	7%	18%
Private home (VFR)	16%	17%
Seasonal Home (2nd Home)	5%	4%
Campground	5%	3%
Day Travel	20%	16%

Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics

*Amount of visitor spending that supports 1 job does not include other travel spending.

**Annual overnight visitor days / (resident population * 365)

Regional Travel Impacts

North Central / Travel Spending Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Spending ($Millions)										
Visitor	149.5	158.2	135.2	172.5	191.0	197.8	205.8	209.9	2.0%	5.0%
Other Travel*	19.8	18.6	10.3	15.0	22.5	19.9	23.8	21.8	-8.3%	1.4%
Total	**169.4**	**176.7**	**145.5**	**187.4**	**213.6**	**217.7**	**229.6**	**231.7**	**0.9%**	**4.6%**
Visitor Spending by Type of Traveler Accommodation ($Millions)										
Hotel, Motel, STVR	78.1	84.5	66.4	90.6	99.7	105.3	112.2	116.1	3.5%	5.8%
Hotel, Motel	72.8	76.8	58.3	79.6	87.9	92.3	98.7	101.8	3.2%	4.9%
STVR	5.3	7.7	8.2	11.0	11.8	13.0	13.6	14.4	6.0%	15.4%
Campground	8.1	7.9	8.3	9.3	10.7	10.7	10.2	9.5	-6.5%	2.3%
Private Home (VFR)	25.5	25.4	22.3	28.5	33.8	33.3	33.6	33.6	-0.1%	4.0%
Seasonal Home (2nd Home)	8.5	8.6	8.7	9.5	9.3	9.4	9.4	9.5	1.0%	1.7%
Day Travel	29.5	31.8	29.5	34.6	37.6	39.0	40.4	41.1	1.7%	4.9%
Total	**149.5**	**158.2**	**135.2**	**172.5**	**191.0**	**197.8**	**205.8**	**209.9**	**2.0%**	**5.0%**
Visitor Spending by Commodity Purchased ($Millions)										
Accommodations	34.4	37.1	28.0	40.3	45.3	48.4	51.3	52.2	1.9%	6.2%
Food Service	37.9	41.1	38.4	45.1	47.6	51.8	55.6	58.9	5.8%	6.5%
Food Stores	10.8	11.4	11.2	12.7	14.1	14.8	15.2	15.5	2.0%	5.4%
Arts, Ent. & Rec.	12.8	14.1	12.8	14.6	14.7	15.7	16.7	17.0	1.9%	4.1%
Retail Sales	21.9	23.1	22.0	25.2	26.1	26.4	26.8	26.9	0.5%	3.0%
Visitor Air	5.5	4.8	1.5	4.9	5.6	4.9	5.7	5.2	-9.2%	-0.8%
Local Tran. & Gas	26.4	26.6	21.3	29.6	37.6	35.7	34.6	34.2	-1.1%	3.8%
Total	**149.5**	**158.2**	**135.2**	**172.5**	**191.0**	**197.8**	**205.8**	**209.9**	**2.0%**	**5.0%**

Source: Dean Runyan Associates

Note: Percent change calculated on unrounded figures.

*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Idaho regions.

Regional Travel Impacts

North Central / Direct Impact Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Travel Industry Earnings ($Millions)										
Accom. & Food Serv.	26.1	33.8	30.4	37.0	40.7	43.1	44.2	45.3	2.5%	8.2%
Arts, Ent. & Rec.	8.6	8.4	7.6	9.0	9.2	9.7	10.8	11.5	6.4%	4.3%
Retail*	5.2	5.4	5.9	6.3	9.0	9.5	9.8	10.3	5.9%	10.4%
Ground Trans.	2.2	2.4	1.9	2.2	3.0	3.5	3.9	4.2	7.0%	9.8%
Visitor Air	2.1	1.9	1.2	1.1	0.7	1.0	0.8	0.9	10.9%	-11.7%
Other Travel**	7.1	6.8	5.1	4.6	5.0	5.6	5.6	6.0	6.7%	-2.3%
Total	**51.1**	**58.8**	**52.1**	**60.2**	**67.6**	**72.4**	**75.1**	**78.2**	**4.1%**	**6.3%**
Direct Travel Industry Employment (Jobs)										
Accom. & Food Serv.	1,360	1,680	1,470	1,650	1,690	1,680	1,710	1,690	-1.2%	3.1%
Arts, Ent. & Rec.	620	580	550	620	550	600	620	650	4.0%	0.7%
Retail*	200	200	210	210	220	230	230	240	5.3%	2.8%
Ground Trans.	70	70	50	60	60	60	70	70	7.6%	0.6%
Visitor Air	20	20	10	10	10	10	10	10	16.7%	-11.9%
Other Travel**	190	180	160	160	130	140	130	140	8.7%	-4.4%
Total	**2,450**	**2,720**	**2,440**	**2,700**	**2,650**	**2,720**	**2,750**	**2,790**	**1.2%**	**1.9%**
Direct Tax Revenue Generated by Travel Spending ($Millions)										
Local Tax Revenue	1.6	1.6	1.2	1.6	1.6	1.8	1.7	1.7	2.8%	1.2%
State Tax Revenue	13.1	13.9	11.7	14.7	15.1	16.0	16.7	17.2	2.9%	4.0%
Total	**14.6**	**15.5**	**12.8**	**16.4**	**16.8**	**17.7**	**18.3**	**18.9**	**2.9%**	**3.7%**

Source: Dean Runyan Associates

Note: Employment rounded to the nearest 10. Percent change calculated with unrounded figures.

*Retail includes gasoline.

**Other travel includes resident air travel, travel arrangement, and convention/trade shows.

Regional Travel Impacts

Northern Region / Direct Travel Impact Insights, 2025p

	Region	State
Impact of Direct Visitor Spending		
Amount of Visitor Spending that supports 1 job*	$98,868	$100,225
Employee Earnings generated by $100 of Visitor Spending	$39	$35
Direct Tax Revenue generated by $100 of Visitor Spending	$8	$8
Impact of Visitor Volume		
Annual visitor spending from 1 additional overnight visitor per resident household	$50,653,154	$252,582,021
Jobs supported by 1 additional overnight visitor per resident household	512	2,520
Impact of Travel Industry		
Travel Share of Total Employment	8%	4%
Overnight Visitor Day Share**	7.2%	5.9%
Share of Overnight Visitor Spending		
Hotel, Motel	49%	43%
STVR	19%	18%
Private home (VFR)	9%	17%
Seasonal Home (2nd Home)	4%	4%
Campground	3%	3%
Day Travel	15%	16%

Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics

*Amount of visitor spending that supports 1 job does not include other travel spending.

**Annual overnight visitor days / (resident population * 365)

Regional Travel Impacts

Northern / Travel Spending Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Spending ($Millions)										
Visitor	817.1	878.3	828.6	1,138.4	1,187.2	1,217.8	1,267.5	1,316.0	3.8%	7.0%
Other Travel*	22.8	24.0	18.7	28.2	33.2	32.1	32.0	32.9	2.8%	5.3%
Total	**840.0**	**902.3**	**847.3**	**1,166.6**	**1,220.4**	**1,249.9**	**1,299.5**	**1,348.9**	**3.8%**	**7.0%**
Visitor Spending by Type of Traveler Accommodation ($Millions)										
Hotel, Motel, STVR	539.9	585.5	538.9	791.4	805.1	825.8	865.1	900.9	4.1%	7.6%
Hotel, Motel	431.5	456.1	400.1	610.9	580.8	586.8	624.5	651.1	4.3%	6.1%
STVR	108.4	129.4	138.8	180.5	224.3	239.0	240.6	249.9	3.9%	12.7%
Campground	30.3	31.2	31.2	33.4	37.5	37.7	37.1	38.0	2.2%	3.3%
Private Home (VFR)	75.0	79.7	78.5	93.2	113.5	116.5	119.1	122.8	3.1%	7.3%
Seasonal Home (2nd Home)	48.1	49.6	51.3	58.0	54.7	55.6	56.7	57.1	0.6%	2.5%
Day Travel	123.8	132.3	128.7	162.4	176.3	182.3	189.5	197.3	4.1%	6.9%
Total	**817.1**	**878.3**	**828.6**	**1,138.4**	**1,187.2**	**1,217.8**	**1,267.5**	**1,316.0**	**3.8%**	**7.0%**
Visitor Spending by Commodity Purchased ($Millions)										
Accommodations	149.5	164.7	155.8	230.4	229.5	225.3	230.3	232.4	0.9%	6.5%
Food Service	208.4	227.8	223.3	294.4	309.7	334.9	362.1	385.7	6.5%	9.2%
Food Stores	38.8	41.7	43.0	48.5	57.1	61.0	63.1	65.9	4.4%	7.8%
Arts, Ent. & Rec.	246.6	263.8	240.7	341.9	338.1	349.1	365.8	382.8	4.6%	6.5%
Retail Sales	94.3	99.2	97.4	121.1	124.6	124.9	126.5	129.3	2.2%	4.6%
Visitor Air	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	NA	NA
Local Tran. & Gas	79.5	81.1	68.3	102.2	128.2	122.5	119.8	120.0	0.2%	6.1%
Total	**817.1**	**878.3**	**828.6**	**1,138.4**	**1,187.2**	**1,217.8**	**1,267.5**	**1,316.0**	**3.8%**	**7.0%**

Source: Dean Runyan Associates

Note: Percent change calculated on unrounded figures.

*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Idaho regions.

Regional Travel Impacts

Northern / Direct Impact Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Travel Industry Earnings ($Millions)										
Accom. & Food Serv.	126.3	136.5	132.6	163.0	178.6	190.7	199.4	207.3	4.0%	7.3%
Arts, Ent. & Rec.	136.5	148.8	134.5	179.5	193.3	211.3	225.9	234.5	3.8%	8.0%
Retail*	21.0	22.1	24.9	28.2	36.7	38.2	38.5	41.4	7.6%	10.2%
Ground Trans.	7.8	8.4	7.3	9.7	11.7	13.9	15.1	16.4	8.6%	11.2%
Visitor Air	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	NA	NA
Other Travel**	7.8	8.1	7.9	9.2	8.6	9.4	9.4	10.7	14.0%	4.6%
Total	**299.3**	**323.9**	**307.2**	**389.6**	**428.9**	**463.5**	**488.2**	**510.2**	**4.5%**	**7.9%**
Direct Travel Industry Employment (Jobs)										
Accom. & Food Serv.	5,390	5,660	5,140	5,740	5,920	6,090	6,130	6,110	-0.3%	1.8%
Arts, Ent. & Rec.	4,520	4,780	4,160	5,330	5,380	5,580	5,820	5,710	-1.9%	3.4%
Retail*	710	730	780	820	890	920	900	940	4.3%	4.0%
Ground Trans.	250	250	210	250	260	280	310	320	3.3%	3.6%
Visitor Air	0	0	0	0	0	0	0	0	NA	NA
Other Travel**	280	270	290	310	220	240	220	240	8.8%	-2.6%
Total	**11,160**	**11,690**	**10,570**	**12,440**	**12,670**	**13,110**	**13,370**	**13,310**	**-0.4%**	**2.6%**
Direct Tax Revenue Generated by Travel Spending ($Millions)										
Local Tax Revenue	9.0	9.2	7.4	11.0	10.9	11.8	11.0	11.2	2.4%	3.2%
State Tax Revenue	60.4	64.6	59.9	81.8	83.3	87.0	91.0	94.4	3.8%	6.6%
Total	**69.3**	**73.8**	**67.2**	**92.8**	**94.2**	**98.8**	**101.9**	**105.7**	**3.6%**	**6.2%**

Source: Dean Runyan Associates

Note: Employment rounded to the nearest 10. Percent change calculated with unrounded figures.

*Retail includes gasoline.

**Other travel includes resident air travel, travel arrangement, and convention/trade shows.

Regional Travel Impacts

South Central Region / Direct Travel Impact Insights, 2025p

	Region	State
Impact of Direct Visitor Spending		
Amount of Visitor Spending that supports 1 job*	$86,793	$100,225
Employee Earnings generated by $100 of Visitor Spending	$33	$35
Direct Tax Revenue generated by $100 of Visitor Spending	$9	$8
Impact of Visitor Volume		
Annual visitor spending from 1 additional overnight visitor per resident household	$14,731,283	$252,582,021
Jobs supported by 1 additional overnight visitor per resident household	170	2,520
Impact of Travel Industry		
Travel Share of Total Employment	3%	4%
Overnight Visitor Day Share**	5.2%	5.9%
Share of Overnight Visitor Spending		
Hotel, Motel	46%	43%
STVR	4%	18%
Private home (VFR)	19%	17%
Seasonal Home (2nd Home)	2%	4%
Campground	4%	3%
Day Travel	25%	16%

Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics

*Amount of visitor spending that supports 1 job does not include other travel spending.

**Annual overnight visitor days / (resident population * 365)

Regional Travel Impacts

South Central / Travel Spending Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Spending ($Millions)										
Visitor	215.1	218.4	201.8	263.5	311.4	321.3	321.8	332.8	3.4%	6.4%
Other Travel*	23.6	25.4	14.1	20.2	24.6	24.5	28.3	28.8	1.6%	2.9%
Total	**238.7**	**243.7**	**215.9**	**283.7**	**336.0**	**345.9**	**350.1**	**361.6**	**3.3%**	**6.1%**
Visitor Spending by Type of Traveler Accommodation ($Millions)										
Hotel, Motel, STVR	102.8	104.2	92.4	132.4	157.7	164.1	162.2	168.4	3.8%	7.3%
Hotel, Motel	99.4	99.1	85.7	119.8	145.3	150.1	148.2	153.5	3.6%	6.4%
STVR	3.3	5.1	6.8	12.5	12.4	14.0	13.9	14.9	6.6%	23.9%
Campground	9.4	9.5	9.5	10.8	12.1	12.1	12.1	12.8	5.0%	4.4%
Private Home (VFR)	44.2	45.1	41.3	50.7	58.6	59.1	60.6	61.9	2.1%	4.9%
Seasonal Home (2nd Home)	3.4	3.4	3.4	3.8	6.8	6.8	6.9	7.0	2.0%	11.2%
Day Travel	55.3	56.3	55.2	65.9	76.3	79.2	80.0	82.7	3.4%	5.9%
Total	**215.1**	**218.4**	**201.8**	**263.5**	**311.4**	**321.3**	**321.8**	**332.8**	**3.4%**	**6.4%**
Visitor Spending by Commodity Purchased ($Millions)										
Accommodations	46.4	47.0	40.6	61.6	76.1	79.8	77.9	80.5	3.4%	8.2%
Food Service	58.2	60.3	60.9	73.1	82.7	89.6	93.2	98.7	5.9%	7.8%
Food Stores	17.4	17.8	18.2	21.1	24.5	26.0	26.4	27.6	4.6%	6.8%
Arts, Ent. & Rec.	11.5	11.7	11.4	13.3	14.6	15.4	15.5	16.1	3.9%	4.9%
Retail Sales	33.2	33.6	33.2	39.4	45.3	45.6	45.0	46.2	2.6%	4.8%
Visitor Air	5.7	6.4	2.3	4.9	2.4	2.3	4.2	4.1	-2.6%	-4.6%
Local Tran. & Gas	42.6	41.6	35.1	50.1	65.9	62.6	59.5	59.5	-0.1%	4.9%
Total	**215.1**	**218.4**	**201.8**	**263.5**	**311.4**	**321.3**	**321.8**	**332.8**	**3.4%**	**6.4%**

Source: Dean Runyan Associates

Note: Percent change calculated on unrounded figures.

*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Idaho regions.

Regional Travel Impacts

South Central / Direct Impact Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Travel Industry Earnings ($Millions)										
Accom. & Food Serv.	37.3	41.5	39.2	47.4	53.7	58.7	60.3	62.0	2.7%	7.5%
Arts, Ent. & Rec.	7.6	7.5	7.0	8.4	10.2	11.2	12.1	14.0	14.9%	9.1%
Retail*	8.6	8.7	9.8	10.8	14.6	15.7	15.6	15.7	1.0%	9.0%
Ground Trans.	3.6	3.7	3.3	4.0	5.3	6.5	7.2	7.8	7.8%	11.4%
Visitor Air	1.4	1.5	1.3	1.3	1.3	1.1	1.1	1.0	-1.2%	-3.9%
Other Travel**	7.5	7.8	7.1	6.7	7.6	8.8	8.2	8.1	0.0%	1.2%
Total	**66.0**	**70.6**	**67.8**	**78.5**	**92.7**	**102.0**	**104.5**	**108.6**	**4.0%**	**7.4%**
Direct Travel Industry Employment (Jobs)										
Accom. & Food Serv.	1,920	2,040	1,890	2,080	2,140	2,190	2,200	2,170	-1.1%	1.8%
Arts, Ent. & Rec.	690	740	680	840	870	870	920	970	6.2%	5.0%
Retail*	290	290	310	330	350	360	360	350	-2.2%	2.6%
Ground Trans.	120	110	100	100	110	130	140	140	-2.1%	2.5%
Visitor Air	30	30	20	10	10	10	10	10	-7.7%	-10.5%
Other Travel**	260	260	230	220	180	210	190	190	-2.6%	-4.3%
Total	**3,300**	**3,460**	**3,230**	**3,580**	**3,660**	**3,770**	**3,820**	**3,830**	**0.4%**	**2.2%**
Direct Tax Revenue Generated by Travel Spending ($Millions)										
Local Tax Revenue	1.7	1.7	1.3	1.9	1.9	2.2	1.9	2.0	2.6%	2.0%
State Tax Revenue	20.0	20.3	18.3	23.5	24.9	26.2	26.6	27.6	3.8%	4.7%
Total	**21.7**	**22.0**	**19.6**	**25.4**	**26.8**	**28.4**	**28.5**	**29.6**	**3.7%**	**4.5%**

Source: Dean Runyan Associates

Note: Employment rounded to the nearest 10. Percent change calculated with unrounded figures.

*Retail includes gasoline.

**Other travel includes resident air travel, travel arrangement, and convention/trade shows.

Regional Travel Impacts

Southeastern Region / Direct Travel Impact Insights, 2025p

	Region	State
Impact of Direct Visitor Spending		
Amount of Visitor Spending that supports 1 job*	$82,244	$100,225
Employee Earnings generated by $100 of Visitor Spending	$33	$35
Direct Tax Revenue generated by $100 of Visitor Spending	$8	$8
Impact of Visitor Volume		
Annual visitor spending from 1 additional overnight visitor per resident household	$13,444,163	$252,582,021
Jobs supported by 1 additional overnight visitor per resident household	163	2,520
Impact of Travel Industry		
Travel Share of Total Employment	4%	4%
Overnight Visitor Day Share**	5.4%	5.9%
Share of Overnight Visitor Spending		
Hotel, Motel	37%	43%
STVR	7%	18%
Private home (VFR)	18%	17%
Seasonal Home (2nd Home)	4%	4%
Campground	5%	3%
Day Travel	29%	16%

Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics

*Amount of visitor spending that supports 1 job does not include other travel spending.

**Annual overnight visitor days / (resident population * 365)

Regional Travel Impacts

Southeastern / Travel Spending Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Spending ($Millions)										
Visitor	257.6	265.2	227.4	282.8	308.8	317.6	331.4	332.4	0.3%	3.7%
Other Travel*	23.6	23.8	13.7	18.7	21.9	22.5	24.8	23.2	-6.5%	-0.2%
Total	**281.2**	**289.1**	**241.1**	**301.5**	**330.7**	**340.2**	**356.2**	**355.7**	**-0.2%**	**3.4%**
Visitor Spending by Type of Traveler Accommodation ($Millions)										
Hotel, Motel, STVR	113.7	119.2	92.1	126.8	132.7	137.8	147.5	146.2	-0.9%	3.6%
Hotel, Motel	103.9	106.6	78.1	103.9	113.9	117.1	125.4	122.9	-2.0%	2.4%
STVR	9.9	12.6	14.0	22.9	18.8	20.6	22.1	23.3	5.1%	13.0%
Campground	13.9	14.1	14.1	15.0	16.8	16.8	17.4	17.4	0.1%	3.3%
Private Home (VFR)	44.8	44.5	40.6	48.9	56.8	57.1	57.5	58.2	1.2%	3.8%
Seasonal Home (2nd Home)	9.5	9.7	9.8	11.0	13.1	13.3	13.4	13.5	1.0%	5.1%
Day Travel	75.6	77.8	70.7	81.2	89.3	92.6	95.6	97.1	1.6%	3.6%
Total	**257.6**	**265.2**	**227.4**	**282.8**	**308.8**	**317.6**	**331.4**	**332.4**	**0.3%**	**3.7%**
Visitor Spending by Commodity Purchased ($Millions)										
Accommodations	49.1	50.9	39.7	58.6	60.8	62.9	66.9	65.4	-2.2%	4.2%
Food Service	63.7	67.3	61.7	71.4	76.1	82.5	89.3	92.4	3.5%	5.4%
Food Stores	20.8	21.4	20.7	23.1	25.7	27.1	28.2	28.9	2.4%	4.8%
Arts, Ent. & Rec.	30.2	31.5	27.2	30.8	31.7	33.4	35.0	35.4	0.9%	2.3%
Retail Sales	43.5	44.7	40.9	46.6	50.4	50.8	51.5	51.6	0.2%	2.5%
Visitor Air	4.8	4.4	1.7	3.0	1.8	1.8	2.8	2.3	-18.3%	-9.8%
Local Tran. & Gas	45.5	45.0	35.5	49.2	62.4	59.2	57.6	56.4	-2.0%	3.1%
Total	**257.6**	**265.2**	**227.4**	**282.8**	**308.8**	**317.6**	**331.4**	**332.4**	**0.3%**	**3.7%**

Source: Dean Runyan Associates

Note: Percent change calculated on unrounded figures.

*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Idaho regions.

Regional Travel Impacts

Southeastern / Direct Impact Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Travel Industry Earnings ($Millions)										
Accom. & Food Serv.	33.9	36.5	33.8	39.6	47.2	51.2	50.7	52.6	3.7%	6.5%
Arts, Ent. & Rec.	19.8	22.2	20.3	22.3	24.0	24.3	25.4	26.5	4.2%	4.2%
Retail*	10.6	10.8	11.4	12.1	15.0	15.7	16.2	17.5	8.1%	7.5%
Ground Trans.	4.0	4.2	3.3	3.8	4.7	5.5	6.1	6.9	13.6%	8.1%
Visitor Air	1.9	1.6	1.2	0.8	0.2	0.3	0.4	0.3	-19.2%	-22.9%
Other Travel**	8.4	8.3	6.6	5.8	4.6	5.7	6.0	6.0	0.1%	-4.8%
Total	**78.6**	**83.5**	**76.7**	**84.4**	**95.6**	**102.7**	**104.8**	**109.8**	**4.8%**	**4.9%**
Direct Travel Industry Employment (Jobs)										
Accom. & Food Serv.	1,780	1,880	1,710	1,830	2,010	2,090	2,010	2,020	0.4%	1.8%
Arts, Ent. & Rec.	1,230	1,430	1,290	1,380	1,420	1,310	1,260	1,250	-0.8%	0.2%
Retail*	430	430	440	450	430	430	450	460	2.0%	0.8%
Ground Trans.	130	130	100	100	90	100	120	120	5.2%	-0.6%
Visitor Air	10	10	10	10	0	0	0	0	-33.3%	-24.3%
Other Travel**	260	260	240	240	180	200	190	190	0.5%	-4.3%
Total	**3,850**	**4,130**	**3,780**	**4,000**	**4,120**	**4,140**	**4,030**	**4,040**	**0.3%**	**0.7%**
Direct Tax Revenue Generated by Travel Spending ($Millions)										
Local Tax Revenue	2.2	2.2	1.6	2.1	2.1	2.3	2.0	2.1	2.8%	-0.8%
State Tax Revenue	16.3	16.6	13.9	18.4	23.4	24.4	25.6	26.0	1.6%	6.8%
Total	**18.5**	**18.8**	**15.5**	**20.5**	**25.5**	**26.7**	**27.6**	**28.1**	**1.7%**	**6.1%**

Source: Dean Runyan Associates

Note: Employment rounded to the nearest 10. Percent change calculated with unrounded figures.

*Retail includes gasoline.

Regional Travel Impacts

Southwestern Region / Direct Travel Impact Insights, 2025p

	Region	State
Impact of Direct Visitor Spending		
Amount of Visitor Spending that supports 1 job*	$108,823	$100,225
Employee Earnings generated by $100 of Visitor Spending	$35	$35
Direct Tax Revenue generated by $100 of Visitor Spending	$9	$8
Impact of Visitor Volume		
Annual visitor spending from 1 additional overnight visitor per resident household	$113,858,240	$252,582,021
Jobs supported by 1 additional overnight visitor per resident household	1,046	2,520
Impact of Travel Industry		
Travel Share of Total Employment	3%	4%
Overnight Visitor Day Share**	4.8%	5.9%
Share of Overnight Visitor Spending		
Hotel, Motel	43%	43%
STVR	13%	18%
Private home (VFR)	23%	17%
Seasonal Home (2nd Home)	3%	4%
Campground	2%	3%
Day Travel	15%	16%

Source: Dean Runyan Associates, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics

*Amount of visitor spending that supports 1 job does not include other travel spending.

**Annual overnight visitor days / (resident population * 365)

Regional Travel Impacts

Southwestern / Travel Spending Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Spending ($Millions)										
Visitor	1,298.0	1,394.3	1,086.8	1,484.0	1,847.1	1,882.0	1,968.2	2,034.7	3.4%	6.6%
Other Travel*	381.8	427.0	221.3	377.7	529.3	544.3	597.5	609.8	2.1%	6.9%
Total	**1,679.8**	**1,821.3**	**1,308.1**	**1,861.7**	**2,376.4**	**2,426.3**	**2,565.7**	**2,644.4**	**3.1%**	**6.7%**
Visitor Spending by Type of Traveler Accommodation ($Millions)										
Hotel, Motel, STVR	671.4	730.8	533.1	789.5	1,025.2	1,045.3	1,094.3	1,137.8	4.0%	7.8%
Hotel, Motel	575.2	608.7	400.2	612.3	804.8	803.7	853.9	880.9	3.2%	6.3%
STVR	96.3	122.0	132.8	177.2	220.3	241.6	240.4	256.9	6.9%	15.1%
Campground	36.8	38.6	38.5	42.2	43.4	43.6	44.1	45.6	3.3%	3.1%
Private Home (VFR)	334.7	356.0	271.8	354.3	438.8	445.8	470.0	477.9	1.7%	5.2%
Seasonal Home (2nd Home)	44.7	46.3	48.1	53.3	61.7	62.6	63.4	63.8	0.7%	5.2%
Day Travel	210.4	222.7	195.3	244.7	278.0	284.6	296.5	309.6	4.4%	5.7%
Total	**1,298.0**	**1,394.3**	**1,086.8**	**1,484.0**	**1,847.1**	**1,882.0**	**1,968.2**	**2,034.7**	**3.4%**	**6.6%**
Visitor Spending by Commodity Purchased ($Millions)										
Accommodations	252.8	276.7	205.9	315.5	402.9	422.8	439.0	455.3	3.7%	8.8%
Food Service	335.9	366.4	328.6	407.7	462.4	493.3	531.2	569.1	7.1%	7.8%
Food Stores	73.0	78.6	74.8	88.4	100.7	106.3	109.9	116.2	5.7%	6.9%
Arts, Ent. & Rec.	58.2	62.7	57.3	68.3	75.3	79.8	81.2	86.1	6.0%	5.8%
Retail Sales	177.9	187.1	164.7	202.5	229.2	228.4	232.2	238.2	2.6%	4.3%
Visitor Air	173.6	191.3	78.4	128.9	223.5	222.9	254.5	248.0	-2.6%	5.2%
Local Tran. & Gas	226.6	231.5	177.1	272.7	353.0	328.7	320.2	321.8	0.5%	5.1%
Total	**1,298.0**	**1,394.3**	**1,086.8**	**1,484.0**	**1,847.1**	**1,882.0**	**1,968.2**	**2,034.7**	**3.4%**	**6.6%**

Source: Dean Runyan Associates

Note: Percent change calculated on unrounded figures.

*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Idaho regions.

Regional Travel Impacts

Southwestern / Direct Impact Detail

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR 18-25
Direct Travel Industry Earnings ($Millions)										
Accom. & Food Serv.	222.5	243.4	217.7	261.9	311.1	330.0	348.8	355.7	2.0%	6.9%
Arts, Ent. & Rec.	41.7	46.7	44.8	54.3	61.8	78.2	77.5	84.7	9.4%	10.7%
Retail*	45.3	47.7	48.5	55.2	63.5	67.2	68.5	72.9	6.4%	7.1%
Ground Trans.	26.8	29.2	22.2	27.0	32.9	38.5	41.1	43.3	5.4%	7.1%
Visitor Air	36.4	37.6	27.3	15.6	23.1	26.0	27.8	31.0	11.7%	-2.3%
Other Travel**	95.9	104.0	75.4	84.3	100.5	114.0	121.9	134.3	10.2%	4.9%
Total	**468.6**	**508.6**	**435.9**	**498.3**	**593.0**	**653.9**	**685.6**	**722.0**	**5.3%**	**6.4%**
Direct Travel Industry Employment (Jobs)										
Accom. & Food Serv.	9,090	9,520	8,250	9,080	9,770	10,170	10,310	10,330	0.1%	1.8%
Arts, Ent. & Rec.	2,900	3,070	2,730	3,160	3,340	3,760	3,810	4,080	7.1%	5.0%
Retail*	1,360	1,390	1,330	1,390	1,410	1,470	1,490	1,520	2.2%	1.7%
Ground Trans.	820	830	580	640	690	750	800	810	1.5%	-0.2%
Visitor Air	340	340	260	120	190	210	230	240	4.3%	-5.0%
Other Travel**	1,710	1,790	1,430	1,460	1,450	1,620	1,660	1,720	3.5%	0.0%
Total	**16,220**	**16,930**	**14,580**	**15,850**	**16,840**	**17,980**	**18,300**	**18,700**	**2.2%**	**2.1%**
Direct Tax Revenue Generated by Travel Spending ($Millions)										
Local Tax Revenue	16.8	17.2	11.5	16.5	17.8	19.4	18.3	19.0	4.1%	1.8%
State Tax Revenue	106.9	113.6	93.4	126.5	136.3	143.0	149.7	156.5	4.6%	5.6%
Total	**123.6**	**130.8**	**105.0**	**142.9**	**154.1**	**162.4**	**168.0**	**175.6**	**4.5%**	**5.1%**

Source: Dean Runyan Associates

Note: Employment rounded to the nearest 10. Percent change calculated with unrounded figures.

*Retail includes gasoline.

**Other travel includes resident air travel, travel arrangement, and convention/trade shows.

Regional Travel Impacts

Overnight Visitor Volume

	Person (Thousands)						Party (Thousands)					
	2023		2024		2025		2023		2024		2025	
	Nights	Trips	Nights	Trips	Nights	Trips	Nights	Trips	Nights	Trips	Nights	Trips
Central												
Hotel, Motel	627.7	232.0	648.5	239.9	679.3	251.6	235.6	87.1	243.4	90.1	255.0	94.5
STVR	650.2	233.9	622.1	223.8	652.0	234.5	188.5	67.8	180.3	64.9	189.0	68.0
Private Home (VFR)	695.2	241.5	700.5	243.4	707.6	245.9	265.4	92.2	267.4	92.9	270.1	93.8
Other Overnight	911.0	261.4	939.9	269.7	945.7	271.3	308.3	88.5	317.8	91.2	319.7	91.7
Total	**2,884.1**	**968.9**	**2,911.1**	**976.8**	**2,984.7**	**1,003.3**	**997.8**	**335.5**	**1,009.0**	**339.0**	**1,033.8**	**348.0**
Eastern												
Hotel, Motel	1,386.5	516.8	1,485.3	553.3	1,558.1	580.1	587.7	219.7	628.9	235.0	659.2	246.2
STVR	1,217.9	438.1	1,301.5	468.1	1,405.0	505.4	353.0	127.0	377.2	135.7	407.2	146.5
Private Home (VFR)	2,935.8	808.7	2,988.1	823.2	3,025.3	832.5	1,084.1	298.5	1,103.4	303.9	1,117.1	307.3
Other Overnight	845.3	242.5	860.3	246.8	844.6	242.2	285.3	81.9	290.4	83.3	285.1	81.8
Total	**6,385.5**	**2,006.1**	**6,635.2**	**2,091.4**	**6,832.9**	**2,160.2**	**2,310.1**	**727.1**	**2,399.9**	**757.9**	**2,468.6**	**781.8**
North Central												
Hotel, Motel	600.0	214.9	625.3	224.9	648.8	232.9	239.4	86.1	251.1	90.7	259.7	93.6
STVR	115.9	41.7	120.5	43.3	126.9	45.6	33.6	12.1	34.9	12.6	36.8	13.2
Private Home (VFR)	1,167.6	340.7	1,170.2	342.0	1,168.6	341.3	430.9	125.7	431.9	126.2	431.3	125.9
Other Overnight	350.6	100.4	345.1	98.8	334.3	95.8	117.4	33.6	115.6	33.1	112.1	32.1
Total	**2,234.1**	**697.7**	**2,261.1**	**709.1**	**2,278.6**	**715.6**	**821.3**	**257.5**	**833.5**	**262.5**	**839.9**	**264.8**

Regional Travel Impacts

Overnight Visitor Volume

	Person (Thousands)						Party (Thousands)					
	2023		2024		2025		2023		2024		2025	
	Nights	Trips	Nights	Trips	Nights	Trips	Nights	Trips	Nights	Trips	Nights	Trips
Northern												
Hotel, Motel	1,670.6	641.8	1,781.8	684.0	1,833.0	703.8	604.9	232.2	645.4	247.6	663.8	254.7
STVR	822.4	295.8	817.5	294.0	841.4	302.7	238.4	85.8	236.9	85.2	243.9	87.7
Private Home (VFR)	3,013.6	832.7	3,078.8	851.5	3,119.0	861.3	1,260.4	340.5	1,287.3	348.0	1,304.8	352.2
Other Overnight	1,661.7	476.7	1,679.8	481.9	1,675.9	480.7	561.2	161.0	567.6	162.9	566.1	162.4
Total	**7,168.3**	**2,247.0**	**7,357.8**	**2,311.5**	**7,469.3**	**2,348.6**	**2,664.8**	**819.4**	**2,737.1**	**843.7**	**2,778.6**	**857.1**
South Central												
Hotel, Motel	1,023.6	376.0	999.1	366.9	1,014.3	373.0	424.4	156.5	414.1	152.7	421.2	155.5
STVR	140.4	50.5	141.4	50.9	151.8	54.6	40.7	14.6	41.0	14.7	44.0	15.8
Private Home (VFR)	2,200.4	612.9	2,231.4	621.5	2,256.9	628.8	812.4	226.2	823.9	229.4	833.3	232.1
Other Overnight	307.8	88.0	310.4	88.8	316.1	90.4	102.5	29.3	103.4	29.6	105.2	30.1
Total	**3,672.2**	**1,127.5**	**3,682.3**	**1,128.1**	**3,739.1**	**1,146.8**	**1,380.0**	**426.7**	**1,382.3**	**426.4**	**1,403.7**	**433.5**
Southeastern												
Hotel, Motel	808.2	302.6	851.7	319.1	836.5	313.2	344.8	129.4	363.8	136.6	356.9	134.0
STVR	160.6	57.8	173.6	62.4	181.7	65.4	46.5	16.7	50.3	18.1	52.7	18.9
Private Home (VFR)	2,099.5	585.7	2,114.9	590.0	2,127.5	593.5	775.2	216.2	780.9	217.8	785.5	219.1
Other Overnight	518.6	148.5	531.3	152.1	526.1	150.6	173.4	49.6	177.5	50.8	175.8	50.3
Total	**3,586.9**	**1,094.4**	**3,671.4**	**1,123.6**	**3,671.8**	**1,122.6**	**1,339.9**	**412.0**	**1,372.4**	**423.3**	**1,370.9**	**422.3**
Southwestern												
Hotel, Motel	3,582.4	1,288.8	3,789.2	1,362.4	3,942.5	1,416.5	1,611.2	580.1	1,703.8	613.1	1,766.0	635.1
STVR	1,701.1	611.9	1,682.5	605.2	1,777.1	639.2	493.1	177.4	487.7	175.4	515.1	185.3
Private Home (VFR)	8,662.6	2,349.9	8,859.9	2,404.8	9,029.7	2,450.9	3,419.0	919.0	3,496.4	940.3	3,563.4	958.3
Other Overnight	1,963.7	563.1	1,991.9	571.1	1,996.4	572.4	661.9	189.8	671.3	192.5	672.6	192.9
Total	**15,909.8**	**4,813.7**	**16,323.4**	**4,943.6**	**16,745.7**	**5,079.1**	**6,185.2**	**1,866.3**	**6,359.3**	**1,921.4**	**6,517.1**	**1,971.6**

Regional Travel Impacts

Overnight Trip Details

	Person		Party			
	Day	Trip	Day	Trip	Party Size	Length of Stay
Central						
Hotel, Motel	$339	$915	$903	$2,438	2.7	2.7
STVR	$331	$920	$1,141	$3,173	3.5	2.8
Private Home (VFR)	$106	$304	$277	$796	2.6	2.9
Other Overnight	$57	$200	$170	$592	3.0	3.5
All Overnight	$193	$573	$556	$1,652	2.9	3.0
Eastern						
Hotel, Motel	$160	$429	$377	$1,010	2.4	2.7
STVR	$146	$406	$503	$1,400	3.5	2.8
Private Home (VFR)	$34	$122	$91	$331	2.7	3.6
Other Overnight	$51	$177	$150	$524	3.0	3.5
All Overnight	$88	$277	$242	$765	2.8	3.2
North Central						
Hotel, Motel	$157	$437	$392	$1,088	2.5	2.8
STVR	$113	$315	$391	$1,086	3.5	2.8
Private Home (VFR)	$29	$98	$78	$267	2.7	3.4
Other Overnight	$57	$199	$170	$593	3.0	3.5
All Overnight	$74	$236	$201	$637	2.7	3.2

Regional Travel Impacts

Overnight Trip Details

	Person		Party			
	Day	Trip	Day	Trip	Party Size	Length of Stay
Northern						
Hotel, Motel	$355	$925	$981	$2,556	2.8	2.6
STVR	$297	$826	$1,025	$2,848	3.4	2.8
Private Home (VFR)	$39	$143	$94	$349	2.4	3.6
Other Overnight	$57	$198	$168	$585	3.0	3.5
All Overnight	$150	$476	$403	$1,305	2.7	3.2
South Central						
Hotel, Motel	$151	$412	$365	$988	2.4	2.7
STVR	$98	$272	$338	$939	3.5	2.8
Private Home (VFR)	$27	$98	$74	$267	2.7	3.6
Other Overnight	$63	$219	$188	$658	3.0	3.5
All Overnight	$67	$218	$178	$577	2.7	3.3
Southeastern						
Hotel, Motel	$147	$392	$344	$917	2.3	2.7
STVR	$128	$356	$442	$1,229	3.5	2.8
Private Home (VFR)	$27	$98	$74	$266	2.7	3.6
Other Overnight	$59	$205	$176	$614	3.0	3.5
All Overnight	$64	$210	$172	$557	2.7	3.3
Southwestern						
Hotel, Motel	$223	$622	$499	$1,387	2.2	2.8
STVR	$145	$402	$499	$1,386	3.5	2.8
Private Home (VFR)	$53	$195	$134	$499	2.5	3.7
Other Overnight	$55	$191	$163	$567	3.0	3.5
All Overnight	$103	$340	$265	$875	2.6	3.3

County Travel Impacts

2025p

County Travel Impacts

Direct Travel Impacts

2025p Summary

	Direct Spending					Direct Tax Revenue		
County Name	Visitor Spend	Other Spend*	Total	Earnings**	Employment	Visitor Tax	Employee Tax***	Total
Ada	$1,467.7M	$616.4M	$2,084.1M	$539.2M	12,180	$87.2M	$38.8M	$126.1M
Adams	$8.2M	$0.8M	$9.0M	$3.0M	110	$0.6M	$0.2M	$0.7M
Bannock	$245.3M	$23.0M	$268.3M	$82.8M	2,890	$14.6M	$5.8M	$20.4M
Bear Lake	$24.2M	$1.1M	$25.3M	$8.2M	280	$1.6M	$0.6M	$2.2M
Benewah	$11.3M	$1.7M	$13.0M	$5.9M	150	$0.8M	$0.4M	$1.2M
Bingham	$21.4M	$8.3M	$29.6M	$9.9M	480	$2.0M	$0.7M	$2.7M
Blaine	$523.3M	$21.1M	$544.4M	$223.5M	6,080	$31.7M	$15.7M	$47.4M
Boise	$26.6M	$1.4M	$28.0M	$7.7M	270	$1.7M	$0.5M	$2.2M
Bonner	$220.8M	$8.8M	$229.6M	$71.6M	2,200	$15.6M	$5.2M	$20.8M
Bonneville	$384.8M	$78.5M	$463.3M	$141.1M	4,490	$23.2M	$10.1M	$33.3M
Boundary	$18.7M	$2.3M	$21.0M	$10.7M	400	$0.9M	$0.8M	$1.7M
Butte	$2.8M	$0.4M	$3.3M	$1.0M	40	$0.2M	$0.1M	$0.3M
Camas	$2.7M	$0.2M	$2.9M	$0.4M	10	$0.2M	$0.0M	$0.2M
Canyon	$167.7M	$46.4M	$214.1M	$67.7M	2,850	$14.3M	$4.9M	$19.3M
Caribou	$9.6M	$1.2M	$10.7M	$3.1M	150	$0.7M	$0.2M	$0.9M
Cassia	$29.1M	$5.4M	$34.4M	$7.9M	260	$2.1M	$0.6M	$2.7M
Clark	$1.2M	$0.1M	$1.3M	$0.4M	10	$0.1M	$0.0M	$0.1M
Clearwater	$14.4M	$1.5M	$15.9M	$5.3M	230	$1.0M	$0.4M	$1.4M

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Earnings include wage and salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors.

**Employee tax contributions are based on the associated travel activity.

County Travel Impacts

Direct Travel Impacts

2025p Summary

	Direct Spending					Direct Tax Revenue		
County Name	Visitor Spend	Other Spend*	Total	Earnings**	Employment	Visitor Tax	Employee Tax***	Total
Custer	$40.7M	$2.6M	$43.2M	$19.7M	540	$2.9M	$1.3M	$4.2M
Elmore	$41.8M	$6.6M	$48.4M	$16.7M	810	$2.9M	$1.1M	$4.0M
Franklin	$9.0M	$2.6M	$11.5M	$1.9M	90	$0.8M	$0.1M	$0.9M
Fremont	$133.2M	$2.3M	$135.5M	$26.7M	970	$9.0M	$1.9M	$10.8M
Gem	$7.4M	$3.5M	$11.0M	$4.0M	190	$0.8M	$0.3M	$1.0M
Gooding	$12.0M	$2.7M	$14.7M	$4.3M	190	$0.9M	$0.3M	$1.2M
Idaho	$31.3M	$2.9M	$34.2M	$12.1M	530	$2.4M	$0.8M	$3.2M
Jefferson	$18.4M	$5.7M	$24.1M	$8.1M	340	$1.6M	$0.5M	$2.1M
Jerome	$32.2M	$4.3M	$36.5M	$10.7M	300	$2.3M	$0.8M	$3.1M
Kootenai	$992.0M	$40.9M	$1,032.8M	$408.2M	10,170	$48.9M	$28.8M	$77.7M
Latah	$44.8M	$7.8M	$52.7M	$14.3M	680	$3.5M	$1.0M	$4.5M
Lemhi	$17.4M	$1.4M	$18.8M	$5.2M	180	$1.4M	$0.4M	$1.8M
Lewis	$5.7M	$0.6M	$6.3M	$1.7M	70	$0.4M	$0.1M	$0.5M
Lincoln	$1.3M	$0.9M	$2.3M	$0.4M	10	$0.2M	$0.0M	$0.2M
Madison	$53.6M	$8.9M	$62.5M	$16.4M	690	$4.1M	$1.1M	$5.2M
Minidoka	$28.9M	$3.7M	$32.6M	$9.7M	290	$2.1M	$0.7M	$2.8M
Nez Perce	$104.2M	$18.3M	$122.6M	$44.8M	1,280	$6.0M	$3.2M	$9.2M
Oneida	$3.2M	$0.8M	$4.0M	$1.7M	40	$0.3M	$0.1M	$0.4M

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.
**Earnings include wage and salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors.
***Employee tax contributions are based on the associated travel activity.

County Travel Impacts

Direct Travel Impacts

2025p Summary

	Direct Spending					Direct Tax Revenue		
County Name	Visitor Spend	Other Spend*	Total	Earnings**	Employment	Visitor Tax	Employee Tax***	Total
Owyhee	$7.0M	$2.0M	$9.0M	$3.2M	210	$0.6M	$0.2M	$0.8M
Payette	$9.3M	$4.5M	$13.8M	$3.5M	130	$0.9M	$0.2M	$1.2M
Power	$4.9M	$1.3M	$6.2M	$2.1M	100	$0.4M	$0.2M	$0.5M
Shoshone	$50.2M	$2.3M	$52.5M	$13.9M	400	$3.3M	$1.0M	$4.3M
Teton	$105.8M	$2.1M	$108.0M	$29.4M	810	$7.2M	$2.1M	$9.3M
Twin Falls	$210.6M	$27.6M	$238.2M	$75.3M	2,780	$13.9M	$5.5M	$19.3M
Valley	$215.5M	$3.2M	$218.6M	$74.6M	1,860	$13.9M	$5.6M	$19.5M
Washington	$6.5M	$1.9M	$8.4M	$2.4M	80	$0.6M	$0.2M	$0.7M
Total	**$5,366.8M**	**$979.7M**	**$6,346.6M**	**$2,000.5M**	**56.8K**	**$329.8M**	**$142.5M**	**$472.3M**

Note: The sum of county Visitor Spending and Other Spending estimates differs from regional and statewide estimates due to differences in the geographic classification of transportation spending. These differences offset one another, and Total Direct Spending is consistent across all geographic levels.
*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.
**Earnings include wage and salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors.
***Employee tax contributions are based on the associated travel activity.

County Travel Impacts

Direct Travel Impacts

2025p Summary

	Employment			Earnings		
County	Travel	Total	Travel % of Total	Travel	Total	Travel % of Total
Ada	12,180	418,680	3%	$539.2M	$32,522.1M	2%
Adams	110	2,540	4%	$3.0M	$127.0M	2%
Bannock	2,890	55,130	5%	$82.8M	$3,028.9M	3%
Bear Lake	280	3,840	7%	$8.2M	$164.3M	5%
Benewah	150	5,330	3%	$5.9M	$327.5M	2%
Bingham	480	25,850	2%	$9.9M	$1,547.0M	1%
Blaine	6,080	25,160	24%	$223.5M	$1,668.7M	13%
Boise	270	3,620	8%	$7.7M	$194.0M	4%
Bonner	2,200	27,500	8%	$71.6M	$1,471.0M	5%
Bonneville	4,490	91,490	5%	$141.1M	$5,690.6M	2%
Boundary	400	7,240	5%	$10.7M	$398.5M	3%
Butte	40	11,430	0%	$1.0M	$1,509.3M	0%
Camas	10	730	1%	$0.4M	$56.8M	1%
Canyon	2,850	131,750	2%	$67.7M	$7,612.8M	1%
Caribou	150	5,290	3%	$3.1M	$382.5M	1%
Cassia	260	17,970	1%	$7.9M	$1,250.4M	1%
Clark	10	510	2%	$0.4M	$34.9M	1%
Clearwater	230	4,250	5%	$5.3M	$241.6M	2%
Custer	540	2,960	18%	$19.7M	$153.1M	13%
Elmore	810	14,820	5%	$16.7M	$1,064.0M	2%
Franklin	90	7,960	1%	$1.9M	$382.0M	1%
Fremont	970	7,750	12%	$26.7M	$343.4M	8%

Note: Employment rounded to the nearest 10. Travel % of Total calculated using unrounded figures.

County Travel Impacts

Direct Travel Impacts

Earnings and Employment Summary, 2025p

	Employment			Earnings		
County	Travel	Total	Travel % of Total	Travel	Total	Travel % of Total
Gem	190	8,600	2%	$4.0M	$356.4M	1%
Gooding	190	9,790	2%	$4.3M	$855.0M	0%
Idaho	530	8,510	6%	$12.1M	$411.4M	3%
Jefferson	340	15,230	2%	$8.1M	$631.4M	1%
Jerome	300	15,000	2%	$10.7M	$1,087.0M	1%
Kootenai	10,170	111,100	9%	$408.2M	$6,888.4M	6%
Latah	680	25,110	3%	$14.3M	$1,343.2M	1%
Lemhi	180	4,900	4%	$5.2M	$258.9M	2%
Lewis	70	2,460	3%	$1.7M	$123.5M	1%
Lincoln	10	2,790	0%	$0.4M	$208.6M	0%
Madison	690	29,490	2%	$16.4M	$1,346.1M	1%
Minidoka	290	12,880	2%	$9.7M	$796.8M	1%
Nez Perce	1,280	28,990	4%	$44.8M	$1,916.9M	2%
Oneida	40	3,000	1%	$1.7M	$133.5M	1%
Owyhee	210	5,590	4%	$3.2M	$346.0M	1%
Payette	130	12,100	1%	$3.5M	$665.2M	1%
Power	100	5,570	2%	$2.1M	$358.5M	1%
Shoshone	400	6,920	6%	$13.9M	$399.9M	3%
Teton	810	9,650	8%	$29.4M	$460.9M	6%
Twin Falls	2,780	59,700	5%	$75.3M	$3,588.2M	2%
Valley	1,860	9,050	21%	$74.6M	$515.5M	14%
Washington	80	4,880	2%	$2.4M	$220.5M	1%

Note: Employment rounded to the nearest 10. Travel % of Total calculated using unrounded figures.

County Travel Impacts

Ada County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	951.5	1,023.2	722.9	1,027.1	1,331.7	1,358.0	1,439.4	1,467.7	2.0%	6.4%
Other Travel*	388.1	432.9	226.1	384.9	539.4	552.4	604.5	616.4	2.0%	6.8%
Total	1,339.6	1,456.1	949.0	1,411.9	1,871.1	1,910.5	2,043.9	2,084.1	**2.0%**	**6.5%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	152.6	162.2	138.4	174.7	202.5	208.4	217.7	226.2	3.9%	5.8%
Overnight	798.9	861.0	584.4	852.4	1,129.2	1,149.6	1,221.7	1,241.6	1.6%	6.5%
Total	951.5	1,023.2	722.9	1,027.1	1,331.7	1,358.0	1,439.4	1,467.7	**2.0%**	**6.4%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	307.5	329.4	178.0	291.0	434.1	418.1	445.8	438.5	-1.6%	5.2%
Non-Transportation	643.9	693.8	544.8	736.1	897.7	939.9	993.6	1,029.3	3.6%	6.9%
Total	951.5	1,023.2	722.9	1,027.1	1,331.7	1,358.0	1,439.4	1,467.7	**2.0%**	**6.4%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	369.9	401.9	328.1	372.6	447.9	488.9	511.2	539.2	5.5%	5.5%
Employment (Jobs)	11,120	11,580	9,560	10,280	11,130	11,860	12,020	12,180	1.3%	1.3%
Tax Revenue	90.2	95.4	71.6	99.6	111.6	117.3	121.7	126.1	3.6%	4.9%
Local Tax Revenue	13.5	13.8	8.5	12.2	13.5	14.5	13.8	14.4	4.0%	0.9%
State Tax Revenue	76.7	81.5	63.1	87.4	98.2	102.7	107.9	111.7	3.6%	5.5%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Adams County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	5.0	5.5	5.5	6.9	7.4	8.3	8.3	8.2	-1.9%	7.3%
Other Travel*	0.6	0.6	0.4	0.7	0.9	0.9	0.8	0.8	-1.3%	5.3%
Total	5.5	6.0	5.9	7.5	8.3	9.1	9.1	9.0	**-1.8%**	**7.1%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.2	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.5%	7.0%
Overnight	4.7	5.2	5.2	6.6	7.0	7.9	7.9	7.8	-2.0%	7.3%
Total	5.0	5.5	5.5	6.9	7.4	8.3	8.3	8.2	**-1.9%**	**7.3%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.5	0.6	0.5	0.7	0.9	0.9	0.9	0.8	-4.1%	6.3%
Non-Transportation	4.4	4.9	5.0	6.2	6.5	7.4	7.5	7.4	-1.6%	7.4%
Total	5.0	5.5	5.5	6.9	7.4	8.3	8.3	8.2	**-1.9%**	**7.3%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	2.4	2.8	2.8	3.3	3.1	3.3	3.2	3.0	-7.3%	3.1%
Employment (Jobs)	130	140	130	160	120	120	110	110	-0.9%	-2.9%
Tax Revenue	0.6	0.6	0.6	0.8	0.7	0.8	0.8	0.7	-3.2%	4.3%
Local Tax Revenue	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-8.6%	-2.7%
State Tax Revenue	0.5	0.5	0.5	0.7	0.6	0.7	0.7	0.7	-2.7%	5.1%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Bannock County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	198.3	207.5	172.2	212.3	227.4	233.6	246.2	245.3	-0.4%	3.1%
Other Travel*	23.7	23.9	13.8	18.6	21.7	22.3	24.6	23.0	-6.5%	-0.4%
Total	222.0	231.5	186.0	230.9	249.1	255.9	270.8	268.3	**-0.9%**	**2.7%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	64.4	66.7	60.2	68.2	74.7	77.7	80.5	81.7	1.5%	3.4%
Overnight	133.9	140.8	112.0	144.1	152.6	155.9	165.7	163.6	-1.3%	2.9%
Total	198.3	207.5	172.2	212.3	227.4	233.6	246.2	245.3	**-0.4%**	**3.1%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	31.5	31.3	22.4	31.2	36.4	34.9	35.4	34.0	-4.0%	1.1%
Non-Transportation	166.8	176.2	149.7	181.1	190.9	198.8	210.7	211.3	0.2%	3.4%
Total	198.3	207.5	172.2	212.3	227.4	233.6	246.2	245.3	**-0.4%**	**3.1%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	61.7	66.4	58.9	65.1	71.6	76.8	78.8	82.8	5.0%	4.3%
Employment (Jobs)	2,730	3,000	2,670	2,850	2,920	2,950	2,870	2,890	0.7%	0.8%
Tax Revenue	12.4	12.8	10.1	13.5	18.7	19.5	20.2	20.4	1.1%	7.3%
Local Tax Revenue	1.8	1.8	1.3	1.7	1.6	1.7	1.6	1.6	2.8%	-1.5%
State Tax Revenue	10.7	11.1	8.8	11.8	17.1	17.8	18.7	18.8	1.0%	8.5%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Bear Lake County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	13.6	13.9	14.6	18.3	20.5	21.7	22.7	24.2	6.3%	8.6%
Other Travel*	0.8	0.8	0.6	0.9	1.3	1.2	1.1	1.1	-2.3%	4.4%
Total	14.4	14.7	15.2	19.2	21.7	22.9	23.9	25.3	**5.9%**	**8.4%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	1.1	1.1	1.2	1.3	1.5	1.6	1.7	1.8	3.3%	6.8%
Overnight	12.4	12.8	13.4	16.9	18.9	20.1	21.0	22.4	6.6%	8.8%
Total	13.6	13.9	14.6	18.3	20.5	21.7	22.7	24.2	**6.3%**	**8.6%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	1.5	1.4	1.3	1.7	2.3	2.3	2.2	2.2	-0.1%	6.1%
Non-Transportation	12.1	12.5	13.3	16.5	18.1	19.5	20.5	21.9	7.0%	8.9%
Total	13.6	13.9	14.6	18.3	20.5	21.7	22.7	24.2	**6.3%**	**8.6%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	4.2	4.3	4.5	4.9	5.9	7.0	7.9	8.2	4.3%	9.9%
Employment (Jobs)	260	260	250	260	260	280	300	280	-5.4%	1.4%
Tax Revenue	1.3	1.3	1.3	1.7	1.7	1.9	2.0	2.2	6.2%	7.8%
Local Tax Revenue	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	2.8%	3.8%
State Tax Revenue	1.2	1.2	1.2	1.5	1.6	1.8	1.9	2.0	6.4%	8.1%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Benewah County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	7.7	8.2	8.0	9.3	11.4	10.9	11.4	11.3	-1.2%	5.7%
Other Travel*	1.2	1.2	0.9	1.4	2.0	1.8	1.7	1.7	-1.8%	4.8%
Total	8.9	9.4	8.9	10.7	13.4	12.7	13.2	13.0	**-1.3%**	**5.6%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.7	0.7	0.7	0.8	1.0	1.0	1.1	1.1	0.3%	6.2%
Overnight	7.0	7.4	7.2	8.4	10.4	9.9	10.3	10.2	-1.4%	5.6%
Total	7.7	8.2	8.0	9.3	11.4	10.9	11.4	11.3	**-1.2%**	**5.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	1.2	1.2	1.0	1.4	1.9	1.7	1.7	1.6	-4.3%	4.2%
Non-Transportation	6.5	7.0	6.9	7.9	9.5	9.2	9.8	9.7	-0.7%	6.0%
Total	7.7	8.2	8.0	9.3	11.4	10.9	11.4	11.3	**-1.2%**	**5.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	2.9	3.2	3.4	3.8	6.3	5.7	5.8	5.9	1.6%	10.5%
Employment (Jobs)	130	140	140	150	160	150	150	150	-0.7%	2.1%
Tax Revenue	0.8	0.9	0.8	1.0	1.2	1.1	1.2	1.2	0.2%	4.6%
Local Tax Revenue	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2%	4.3%
State Tax Revenue	0.8	0.8	0.7	1.0	1.1	1.0	1.1	1.1	0.2%	4.6%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Bingham County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	16.4	15.2	14.4	18.6	20.2	20.5	21.2	21.4	0.5%	3.8%
Other Travel*	6.1	6.1	4.7	7.1	9.6	8.8	8.4	8.3	-1.0%	4.3%
Total	22.6	21.3	19.2	25.7	29.8	29.3	29.6	29.6	**0.1%**	**4.0%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	5.4	5.3	5.2	6.5	6.7	6.9	7.1	7.3	2.1%	4.3%
Overnight	11.0	9.9	9.3	12.2	13.6	13.6	14.1	14.1	-0.3%	3.5%
Total	16.4	15.2	14.4	18.6	20.2	20.5	21.2	21.4	**0.5%**	**3.8%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	3.1	2.8	2.4	3.5	4.1	3.9	3.8	3.7	-2.1%	2.7%
Non-Transportation	13.4	12.4	12.1	15.2	16.1	16.6	17.4	17.6	1.1%	4.0%
Total	16.4	15.2	14.4	18.6	20.2	20.5	21.2	21.4	**0.5%**	**3.8%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	6.7	7.1	7.4	8.1	10.2	10.6	9.6	9.9	3.6%	5.9%
Employment (Jobs)	480	500	500	510	580	520	480	480	0.4%	-0.1%
Tax Revenue	2.5	2.4	2.1	2.9	2.6	2.7	2.7	2.7	1.8%	1.3%
Local Tax Revenue	0.2	0.2	0.1	0.2	0.2	0.2	0.2	0.2	2.1%	-0.1%
State Tax Revenue	2.3	2.2	2.0	2.7	2.4	2.5	2.5	2.5	1.8%	1.4%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Blaine County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	292.1	315.0	278.9	344.5	462.0	468.4	481.7	523.3	8.6%	8.7%
Other Travel*	10.9	11.7	4.6	8.5	15.6	17.2	19.3	21.1	9.1%	9.8%
Total	303.0	326.8	283.6	353.0	477.6	485.6	501.0	544.4	**8.7%**	**8.7%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	6.2	6.6	6.3	7.3	9.1	9.4	9.6	10.1	5.5%	7.3%
Overnight	285.9	308.5	272.6	337.2	453.0	459.1	472.1	513.2	8.7%	8.7%
Total	292.1	315.0	278.9	344.5	462.0	468.4	481.7	523.3	**8.6%**	**8.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	32.3	34.1	21.7	35.4	53.1	51.9	53.6	58.4	8.9%	8.8%
Non-Transportation	259.8	281.0	257.2	309.0	408.9	416.6	428.1	464.9	8.6%	8.7%
Total	292.1	315.0	278.9	344.5	462.0	468.4	481.7	523.3	**8.6%**	**8.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	154.6	156.5	144.4	158.1	186.4	210.2	210.3	223.5	6.3%	5.4%
Employment (Jobs)	5,390	5,750	5,200	5,130	5,400	5,770	6,060	6,080	0.2%	1.7%
Tax Revenue	25.2	26.1	22.5	28.2	41.4	43.6	43.9	47.4	7.9%	9.5%
Local Tax Revenue	6.8	6.8	5.4	7.2	8.1	8.7	8.3	9.0	8.8%	4.1%
State Tax Revenue	18.4	19.3	17.1	21.1	33.3	35.0	35.6	38.4	7.7%	11.1%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Boise County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	20.2	21.4	20.8	19.7	22.5	24.1	24.7	26.6	7.8%	4.0%
Other Travel*	1.0	1.0	0.8	1.2	1.6	1.5	1.4	1.4	-2.0%	4.5%
Total	21.3	22.4	21.6	20.9	24.1	25.6	26.1	28.0	**7.3%**	**4.0%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	1.5	1.6	1.7	1.7	1.9	2.0	2.0	2.1	4.6%	4.9%
Overnight	18.7	19.8	19.1	18.1	20.6	22.1	22.6	24.5	8.1%	3.9%
Total	20.2	21.4	20.8	19.7	22.5	24.1	24.7	26.6	**7.8%**	**4.0%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	1.9	1.9	1.7	1.9	2.6	2.6	2.5	2.6	3.8%	4.3%
Non-Transportation	18.3	19.4	19.0	17.9	19.9	21.5	22.2	24.0	8.3%	4.0%
Total	20.2	21.4	20.8	19.7	22.5	24.1	24.7	26.6	**7.8%**	**4.0%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	4.4	4.7	5.0	5.0	6.6	6.7	7.1	7.7	9.2%	8.2%
Employment (Jobs)	260	270	260	250	270	260	260	270	6.6%	0.8%
Tax Revenue	1.7	1.8	1.7	1.7	1.9	2.0	2.0	2.2	8.2%	3.7%
Local Tax Revenue	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	7.6%	2.2%
State Tax Revenue	1.6	1.7	1.6	1.6	1.7	1.9	1.9	2.1	8.2%	3.8%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Bonner County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	131.5	142.0	143.5	161.1	187.8	206.6	214.8	220.8	2.8%	7.7%
Other Travel*	5.9	5.9	4.7	7.1	9.8	9.2	8.9	8.8	-0.7%	5.8%
Total	137.5	147.9	148.2	168.3	197.7	215.8	223.6	229.6	**2.7%**	**7.6%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	7.7	8.1	8.2	9.1	10.1	11.1	11.5	11.9	3.3%	6.5%
Overnight	123.9	133.9	135.3	152.0	177.8	195.5	203.2	208.9	2.8%	7.8%
Total	131.5	142.0	143.5	161.1	187.8	206.6	214.8	220.8	**2.8%**	**7.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	15.3	15.5	13.6	16.7	22.3	23.4	22.8	22.8	0.0%	5.9%
Non-Transportation	116.2	126.5	129.9	144.4	165.5	183.2	192.0	198.0	3.2%	7.9%
Total	131.5	142.0	143.5	161.1	187.8	206.6	214.8	220.8	**2.8%**	**7.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	42.8	46.1	44.9	52.5	58.9	65.2	68.4	71.6	4.7%	7.6%
Employment (Jobs)	1,970	2,030	1,830	1,970	2,040	2,130	2,170	2,200	1.5%	1.6%
Tax Revenue	13.2	14.1	13.6	16.9	18.0	19.5	20.3	20.8	2.7%	6.7%
Local Tax Revenue	2.3	2.4	2.2	3.1	3.3	3.4	3.4	3.4	1.1%	6.1%
State Tax Revenue	10.9	11.7	11.4	13.8	14.7	16.1	16.9	17.4	3.0%	6.9%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Bonneville County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	243.0	255.9	209.1	296.2	341.5	348.6	367.3	384.8	4.8%	6.8%
Other Travel*	40.4	43.6	24.0	36.2	77.3	67.4	74.4	78.5	5.5%	9.9%
Total	283.4	299.5	233.2	332.4	418.8	416.1	441.7	463.3	**4.9%**	**7.3%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	59.7	62.8	58.1	72.2	76.7	81.5	84.8	88.6	4.5%	5.8%
Overnight	183.3	193.0	151.1	224.0	264.7	267.1	282.5	296.2	4.8%	7.1%
Total	243.0	255.9	209.1	296.2	341.5	348.6	367.3	384.8	**4.8%**	**6.8%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	55.9	58.1	38.3	71.4	95.3	81.8	86.2	89.6	4.0%	7.0%
Non-Transportation	187.1	197.8	170.8	224.8	246.2	266.8	281.1	295.2	5.0%	6.7%
Total	243.0	255.9	209.1	296.2	341.5	348.6	367.3	384.8	**4.8%**	**6.8%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	102.6	107.5	99.2	107.8	122.7	134.1	138.8	141.1	1.7%	4.7%
Employment (Jobs)	3,850	3,890	3,470	3,790	4,140	4,490	4,600	4,490	-2.2%	2.2%
Tax Revenue	24.2	25.0	20.8	28.1	29.0	31.1	32.2	33.3	3.6%	4.7%
Local Tax Revenue	3.1	3.0	2.2	3.2	3.2	3.3	3.1	3.2	3.2%	0.5%
State Tax Revenue	21.1	22.0	18.6	24.9	25.8	27.8	29.1	30.1	3.6%	5.2%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Boundary County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	13.5	15.6	17.4	20.3	16.2	16.5	19.8	18.7	-5.7%	4.7%
Other Travel*	1.6	1.6	1.3	1.8	2.6	2.4	2.3	2.3	-1.9%	5.2%
Total	15.1	17.2	18.7	22.1	18.7	18.9	22.1	21.0	**-5.3%**	**4.8%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.9	1.0	1.0	1.1	1.2	1.2	1.4	1.4	-1.4%	6.6%
Overnight	12.7	14.6	16.4	19.2	15.0	15.3	18.4	17.3	-6.0%	4.6%
Total	13.5	15.6	17.4	20.3	16.2	16.5	19.8	18.7	**-5.7%**	**4.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	1.2	1.3	1.2	1.6	1.8	1.7	1.9	1.7	-6.5%	5.3%
Non-Transportation	12.3	14.3	16.1	18.6	14.4	14.8	18.0	17.0	-5.6%	4.7%
Total	13.5	15.6	17.4	20.3	16.2	16.5	19.8	18.7	**-5.7%**	**4.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	6.1	6.9	7.6	9.1	9.4	11.2	12.0	10.7	-10.7%	8.2%
Employment (Jobs)	300	330	340	390	370	450	460	400	-13.7%	4.2%
Tax Revenue	1.2	1.4	1.4	1.7	1.5	1.7	1.8	1.7	-7.4%	4.5%
Local Tax Revenue	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	-12.0%	2.1%
State Tax Revenue	1.1	1.2	1.2	1.5	1.3	1.4	1.6	1.5	-6.8%	4.8%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Butte County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	2.3	2.1	2.4	2.8	2.4	2.7	2.9	2.8	-1.7%	2.8%
Other Travel*	0.3	0.3	0.3	0.4	0.5	0.5	0.4	0.4	0.2%	3.8%
Total	2.7	2.5	2.7	3.2	2.9	3.2	3.3	3.3	**-1.5%**	**3.0%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.6%	3.4%
Overnight	2.2	2.0	2.3	2.7	2.3	2.6	2.7	2.7	-1.9%	2.8%
Total	2.3	2.1	2.4	2.8	2.4	2.7	2.9	2.8	**-1.7%**	**2.8%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	-3.8%	2.2%
Non-Transportation	2.0	1.8	2.1	2.4	2.0	2.3	2.4	2.4	-1.4%	2.9%
Total	2.3	2.1	2.4	2.8	2.4	2.7	2.9	2.8	**-1.7%**	**2.8%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	0.8	0.7	0.8	0.9	0.9	0.9	0.9	1.0	2.7%	3.5%
Employment (Jobs)	40	40	50	50	30	40	40	40	2.8%	-2.1%
Tax Revenue	0.3	0.2	0.2	0.3	0.2	0.3	0.3	0.3	-0.1%	1.1%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2%	-2.3%
State Tax Revenue	0.2	0.2	0.2	0.3	0.2	0.2	0.3	0.3	-0.2%	1.4%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Camas County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	1.3	1.4	1.5	1.6	2.3	2.3	2.5	2.7	10.0%	10.6%
Other Travel*	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2	3.9%	5.1%
Total	1.5	1.5	1.6	1.7	2.5	2.5	2.7	2.9	**9.5%**	**10.1%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	8.1%	9.2%
Overnight	1.3	1.3	1.4	1.5	2.2	2.2	2.3	2.6	10.1%	10.7%
Total	1.3	1.4	1.5	1.6	2.3	2.3	2.5	2.7	**10.0%**	**10.6%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.2	0.2	0.1	0.2	0.3	0.3	0.3	0.3	5.3%	8.2%
Non-Transportation	1.2	1.2	1.4	1.4	2.0	2.0	2.2	2.4	10.6%	10.9%
Total	1.3	1.4	1.5	1.6	2.3	2.3	2.5	2.7	**10.0%**	**10.6%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	0.3	0.3	0.4	0.3	0.4	0.4	0.4	0.4	-3.7%	4.6%
Employment (Jobs)	20	20	20	20	20	20	10	10	-23.1%	-8.8%
Tax Revenue	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	8.2%	7.5%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-5.0%	-1.3%
State Tax Revenue	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	8.8%	8.0%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Canyon County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	112.4	119.2	109.5	143.1	149.4	150.8	158.9	167.7	5.5%	5.9%
Other Travel*	30.6	30.8	24.6	36.3	49.5	46.5	45.6	46.4	1.8%	6.1%
Total	143.0	150.0	134.1	179.3	198.9	197.3	204.5	214.1	**4.7%**	**5.9%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	33.1	34.8	32.3	39.5	38.6	39.9	42.1	44.5	5.8%	4.3%
Overnight	79.3	84.5	77.2	103.6	110.8	110.8	116.8	123.2	5.5%	6.5%
Total	112.4	119.2	109.5	143.1	149.4	150.8	158.9	167.7	**5.5%**	**5.9%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	19.9	20.0	16.4	23.3	25.6	24.1	23.9	24.3	1.9%	2.9%
Non-Transportation	92.5	99.2	93.1	119.8	123.8	126.7	135.0	143.4	6.2%	6.5%
Total	112.4	119.2	109.5	143.1	149.4	150.8	158.9	167.7	**5.5%**	**5.9%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	37.1	39.7	39.0	47.4	55.8	61.5	65.6	67.7	3.2%	9.0%
Employment (Jobs)	2,100	2,210	2,050	2,400	2,550	2,710	2,800	2,850	1.8%	4.5%
Tax Revenue	14.5	15.1	13.1	18.2	16.8	17.4	18.4	19.3	4.8%	4.1%
Local Tax Revenue	1.0	1.0	0.8	1.1	1.1	1.3	1.2	1.2	1.8%	2.9%
State Tax Revenue	13.6	14.1	12.3	17.0	15.6	16.1	17.2	18.0	5.0%	4.2%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Caribou County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	7.0	7.1	6.2	8.2	9.5	11.1	10.7	9.6	-10.5%	4.6%
Other Travel*	0.9	0.9	0.7	1.0	1.4	1.3	1.2	1.2	-1.4%	3.2%
Total	7.9	8.0	6.9	9.2	10.9	12.4	11.9	10.7	**-9.6%**	**4.5%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.6	0.6	0.6	0.7	0.8	0.9	0.9	0.8	-5.0%	4.7%
Overnight	6.4	6.4	5.7	7.5	8.8	10.2	9.8	8.7	-11.0%	4.6%
Total	7.0	7.1	6.2	8.2	9.5	11.1	10.7	9.6	**-10.5%**	**4.6%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.9	0.9	0.7	1.0	1.3	1.4	1.2	1.1	-11.1%	2.9%
Non-Transportation	6.1	6.2	5.5	7.2	8.3	9.8	9.4	8.5	-10.4%	4.9%
Total	7.0	7.1	6.2	8.2	9.5	11.1	10.7	9.6	**-10.5%**	**4.6%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	2.3	2.3	2.0	2.3	2.8	3.0	3.1	3.1	0.3%	4.1%
Employment (Jobs)	140	130	120	130	140	160	150	150	2.7%	1.6%
Tax Revenue	0.8	0.8	0.6	0.9	0.9	1.0	1.0	0.9	-7.3%	2.5%
Local Tax Revenue	0.1	0.1	0.0	0.1	0.1	0.1	0.1	0.1	-1.2%	-1.8%
State Tax Revenue	0.7	0.7	0.6	0.8	0.8	1.0	0.9	0.9	-7.6%	2.9%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Cassia County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	10.5	11.6	14.5	19.7	26.2	27.7	29.5	29.1	-1.6%	15.7%
Other Travel*	3.8	3.8	3.0	4.4	5.7	5.4	5.2	5.4	2.0%	5.1%
Total	14.3	15.5	17.5	24.2	31.9	33.1	34.8	34.4	**-1.1%**	**13.4%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	3.1	3.4	3.9	4.7	5.8	6.1	6.4	6.4	0.2%	10.7%
Overnight	7.3	8.2	10.7	15.1	20.4	21.6	23.2	22.7	-2.1%	17.5%
Total	10.5	11.6	14.5	19.7	26.2	27.7	29.5	29.1	**-1.6%**	**15.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	1.9	2.0	2.1	3.0	4.4	4.3	4.2	4.0	-4.5%	11.2%
Non-Transportation	8.5	9.6	12.4	16.7	21.8	23.4	25.3	25.0	-1.2%	16.6%
Total	10.5	11.6	14.5	19.7	26.2	27.7	29.5	29.1	**-1.6%**	**15.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	3.8	4.2	4.4	5.9	6.6	6.7	7.6	7.9	3.5%	10.9%
Employment (Jobs)	200	200	210	250	240	230	250	260	2.0%	3.8%
Tax Revenue	1.4	1.5	1.5	2.2	2.4	2.5	2.7	2.7	0.2%	9.7%
Local Tax Revenue	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	2.1%	4.7%
State Tax Revenue	1.3	1.4	1.4	2.1	2.2	2.3	2.6	2.6	0.1%	10.0%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Clark County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	0.8	0.9	0.9	0.9	1.2	1.1	1.1	1.2	7.8%	5.5%
Other Travel*	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.1	-2.9%	1.6%
Total	0.9	1.0	1.0	1.0	1.3	1.2	1.2	1.3	**6.7%**	**5.0%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.2	0.3	0.3	0.2	0.3	0.3	0.3	0.4	4.5%	5.7%
Overnight	0.6	0.6	0.6	0.6	0.9	0.8	0.8	0.8	9.3%	5.3%
Total	0.8	0.9	0.9	0.9	1.2	1.1	1.1	1.2	**7.8%**	**5.5%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.1	4.2%	3.4%
Non-Transportation	0.7	0.8	0.8	0.8	1.0	1.0	0.9	1.0	8.3%	5.8%
Total	0.8	0.9	0.9	0.9	1.2	1.1	1.1	1.2	**7.8%**	**5.5%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	0.2	0.2	0.2	0.2	0.4	0.4	0.4	0.4	11.0%	9.1%
Employment (Jobs)	10	20	20	10	10	10	10	10	20.0%	-2.2%
Tax Revenue	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	8.2%	3.8%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.4%	3.0%
State Tax Revenue	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	8.2%	3.9%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Clearwater County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	10.9	9.9	10.8	12.9	13.7	14.8	14.5	14.4	-0.3%	4.1%
Other Travel*	1.2	1.1	0.9	1.3	1.7	1.6	1.5	1.5	-1.9%	3.4%
Total	12.0	11.0	11.7	14.2	15.4	16.4	16.0	15.9	**-0.4%**	**4.1%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.4	0.4	0.5	0.5	0.5	0.6	0.6	0.6	0.5%	4.0%
Overnight	10.4	9.4	10.4	12.4	13.1	14.2	13.9	13.9	-0.3%	4.1%
Total	10.9	9.9	10.8	12.9	13.7	14.8	14.5	14.4	**-0.3%**	**4.1%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	1.5	1.3	1.3	1.7	2.0	2.0	1.8	1.8	-4.3%	2.6%
Non-Transportation	9.4	8.6	9.5	11.3	11.6	12.8	12.6	12.7	0.3%	4.4%
Total	10.9	9.9	10.8	12.9	13.7	14.8	14.5	14.4	**-0.3%**	**4.1%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	3.1	2.9	3.1	3.9	4.8	5.0	5.0	5.3	5.6%	8.0%
Employment (Jobs)	200	180	190	240	210	220	220	230	8.4%	2.1%
Tax Revenue	1.1	1.0	1.0	1.3	1.3	1.4	1.4	1.4	1.8%	3.4%
Local Tax Revenue	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	4.1%	2.0%
State Tax Revenue	1.0	0.9	0.9	1.2	1.2	1.3	1.3	1.3	1.6%	3.5%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Custer County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	23.8	25.7	27.2	31.6	32.7	34.9	35.5	40.7	14.4%	8.0%
Other Travel*	1.6	1.8	1.3	2.0	2.2	2.3	2.4	2.6	6.9%	6.9%
Total	25.4	27.4	28.5	33.6	34.9	37.2	37.9	43.2	**14.0%**	**7.9%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	1.0	1.0	1.1	1.2	1.2	1.3	1.4	1.5	8.7%	6.2%
Overnight	22.8	24.6	26.1	30.4	31.5	33.6	34.1	39.2	14.7%	8.0%
Total	23.8	25.7	27.2	31.6	32.7	34.9	35.5	40.7	**14.4%**	**8.0%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	2.7	2.8	2.6	3.2	3.8	3.8	3.7	4.0	7.3%	5.7%
Non-Transportation	21.0	22.8	24.6	28.3	28.9	31.1	31.8	36.7	15.3%	8.3%
Total	23.8	25.7	27.2	31.6	32.7	34.9	35.5	40.7	**14.4%**	**8.0%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	9.8	10.4	11.1	12.8	16.3	17.2	18.0	19.7	9.7%	10.6%
Employment (Jobs)	430	440	430	460	500	510	500	540	7.4%	3.4%
Tax Revenue	2.2	2.3	2.3	2.9	3.4	3.7	3.7	4.2	13.3%	10.1%
Local Tax Revenue	0.4	0.4	0.4	0.6	0.6	0.6	0.6	0.7	12.5%	7.0%
State Tax Revenue	1.7	1.8	1.9	2.3	2.9	3.1	3.1	3.6	13.5%	10.9%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Elmore County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	24.1	24.7	27.8	32.6	29.0	26.0	30.6	41.8	36.8%	8.2%
Other Travel*	4.7	4.8	3.7	5.5	6.9	6.7	6.5	6.6	0.8%	5.0%
Total	28.7	29.5	31.5	38.1	36.0	32.7	37.1	48.4	**30.5%**	**7.7%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	5.4	5.8	6.4	7.2	7.2	7.0	7.6	9.2	20.7%	8.0%
Overnight	18.7	18.9	21.5	25.4	21.9	19.1	23.0	32.6	42.2%	8.3%
Total	24.1	24.7	27.8	32.6	29.0	26.0	30.6	41.8	**36.8%**	**8.2%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	3.4	3.6	3.5	4.6	5.0	4.3	4.5	5.5	22.6%	7.1%
Non-Transportation	20.7	21.1	24.3	28.0	24.1	21.7	26.0	36.3	39.3%	8.4%
Total	24.1	24.7	27.8	32.6	29.0	26.0	30.6	41.8	**36.8%**	**8.2%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	10.1	10.8	10.3	11.9	14.4	15.8	16.4	16.7	1.9%	7.4%
Employment (Jobs)	730	780	680	720	740	730	780	810	4.1%	1.6%
Tax Revenue	2.8	2.8	2.8	3.5	3.1	3.0	3.3	4.0	22.6%	5.4%
Local Tax Revenue	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.3	0.5%	1.4%
State Tax Revenue	2.5	2.6	2.6	3.2	2.8	2.6	3.0	3.7	24.8%	5.8%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Franklin County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	4.7	4.2	4.9	5.7	6.4	6.8	7.3	9.0	22.2%	9.7%
Other Travel*	1.8	1.8	1.4	2.1	2.9	2.7	2.6	2.6	0.0%	5.0%
Total	6.5	6.0	6.4	7.8	9.3	9.5	9.9	11.5	**16.5%**	**8.5%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.6	0.6	0.7	0.7	0.8	0.8	0.9	1.0	13.7%	7.3%
Overnight	4.1	3.6	4.3	5.0	5.6	5.9	6.4	7.9	23.4%	10.0%
Total	4.7	4.2	4.9	5.7	6.4	6.8	7.3	9.0	**22.2%**	**9.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.8	0.7	0.7	0.9	1.2	1.1	1.1	1.3	13.6%	7.5%
Non-Transportation	3.9	3.5	4.2	4.9	5.2	5.6	6.2	7.7	23.8%	10.1%
Total	4.7	4.2	4.9	5.7	6.4	6.8	7.3	9.0	**22.2%**	**9.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	1.3	1.2	1.5	1.6	1.8	1.8	2.0	1.9	-2.8%	5.2%
Employment (Jobs)	120	100	120	130	100	110	100	90	-7.8%	-3.0%
Tax Revenue	0.7	0.7	0.7	0.8	0.7	0.8	0.8	0.9	13.1%	3.1%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-4.2%	3.9%
State Tax Revenue	0.7	0.7	0.6	0.8	0.7	0.7	0.8	0.9	13.9%	3.0%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Fremont County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	51.2	60.1	65.8	99.6	107.3	116.8	128.0	133.2	4.1%	14.6%
Other Travel*	1.7	1.7	1.3	2.0	2.7	2.5	2.4	2.3	-2.9%	4.0%
Total	53.0	61.8	67.2	101.6	110.0	119.3	130.4	135.5	**3.9%**	**14.4%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	2.4	2.6	2.7	3.5	4.0	4.4	4.7	4.7	1.0%	10.0%
Overnight	48.8	57.5	63.1	96.1	103.3	112.4	123.3	128.4	4.2%	14.8%
Total	51.2	60.1	65.8	99.6	107.3	116.8	128.0	133.2	**4.1%**	**14.6%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	5.6	6.0	5.5	8.6	11.0	11.5	12.0	11.8	-1.5%	11.3%
Non-Transportation	45.6	54.1	60.3	91.0	96.3	105.3	116.0	121.4	4.6%	15.0%
Total	51.2	60.1	65.8	99.6	107.3	116.8	128.0	133.2	**4.1%**	**14.6%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	12.3	13.8	15.4	19.2	22.1	23.5	25.0	26.7	6.6%	11.8%
Employment (Jobs)	650	700	720	830	910	930	940	970	3.0%	5.9%
Tax Revenue	4.6	5.3	5.6	8.4	8.7	9.5	10.3	10.8	4.8%	13.1%
Local Tax Revenue	0.3	0.3	0.3	0.4	0.5	0.5	0.5	0.5	5.0%	6.0%
State Tax Revenue	4.3	4.9	5.3	8.0	8.3	9.0	9.9	10.4	4.8%	13.5%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Gem County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	4.0	4.2	4.5	5.2	6.7	7.1	7.4	7.4	0.6%	9.2%
Other Travel*	2.3	2.3	1.9	2.9	3.9	3.7	3.6	3.5	-1.9%	6.0%
Total	6.4	6.5	6.4	8.1	10.6	10.8	11.0	11.0	**-0.2%**	**8.1%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	1.1	1.2	1.3	1.4	1.8	1.9	2.0	2.0	1.4%	8.6%
Overnight	2.9	3.0	3.2	3.8	4.9	5.2	5.4	5.4	0.3%	9.5%
Total	4.0	4.2	4.5	5.2	6.7	7.1	7.4	7.4	**0.6%**	**9.2%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.8	0.8	0.8	1.0	1.4	1.4	1.3	1.3	-2.6%	7.2%
Non-Transportation	3.2	3.4	3.8	4.2	5.3	5.8	6.0	6.1	1.3%	9.7%
Total	4.0	4.2	4.5	5.2	6.7	7.1	7.4	7.4	**0.6%**	**9.2%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	1.7	1.8	2.1	2.3	3.3	3.8	4.1	4.0	-1.7%	12.8%
Employment (Jobs)	120	120	130	140	150	160	170	190	12.9%	6.6%
Tax Revenue	0.8	0.8	0.8	0.9	0.9	1.0	1.0	1.0	0.3%	3.3%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	-3.1%	10.9%
State Tax Revenue	0.8	0.8	0.7	0.9	0.9	0.9	1.0	1.0	0.5%	2.9%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Gooding County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	6.3	6.2	6.1	7.7	9.6	10.0	10.5	12.0	14.9%	9.7%
Other Travel*	2.0	2.0	1.6	2.3	3.0	2.8	2.7	2.7	0.0%	4.0%
Total	8.3	8.2	7.7	10.0	12.6	12.8	13.1	14.7	**11.9%**	**8.5%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	1.9	1.8	1.9	2.1	2.7	2.8	2.9	3.3	10.7%	8.3%
Overnight	4.4	4.4	4.2	5.6	6.9	7.2	7.5	8.8	16.5%	10.3%
Total	6.3	6.2	6.1	7.7	9.6	10.0	10.5	12.0	**14.9%**	**9.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	1.1	1.1	0.9	1.2	1.7	1.7	1.6	1.8	10.4%	7.2%
Non-Transportation	5.2	5.2	5.2	6.5	7.8	8.3	8.8	10.2	15.8%	10.2%
Total	6.3	6.2	6.1	7.7	9.6	10.0	10.5	12.0	**14.9%**	**9.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	2.1	2.2	2.4	3.0	3.6	4.0	3.7	4.3	13.5%	10.3%
Employment (Jobs)	140	140	150	180	170	170	170	190	8.2%	4.6%
Tax Revenue	0.9	0.9	0.8	1.0	1.0	1.1	1.1	1.2	11.7%	4.1%
Local Tax Revenue	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	11.9%	6.9%
State Tax Revenue	0.9	0.9	0.8	1.0	1.0	1.0	1.0	1.2	11.7%	4.0%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Idaho County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	23.8	24.1	21.8	24.0	26.2	27.8	28.7	31.3	9.3%	4.0%
Other Travel*	2.2	2.2	1.7	2.5	3.4	3.1	2.9	2.9	-1.8%	4.0%
Total	26.0	26.2	23.5	26.4	29.5	30.9	31.6	34.2	**8.3%**	**4.0%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	1.0	1.0	0.9	1.0	1.1	1.1	1.2	1.3	7.0%	3.8%
Overnight	22.8	23.1	20.9	23.0	25.1	26.6	27.5	30.1	9.4%	4.0%
Total	23.8	24.1	21.8	24.0	26.2	27.8	28.7	31.3	**9.3%**	**4.0%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	3.0	2.9	2.4	2.8	3.6	3.5	3.4	3.6	5.8%	2.7%
Non-Transportation	20.8	21.2	19.5	21.1	22.6	24.3	25.3	27.8	9.8%	4.2%
Total	23.8	24.1	21.8	24.0	26.2	27.8	28.7	31.3	**9.3%**	**4.0%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	7.3	7.7	7.3	8.8	10.9	11.6	11.9	12.1	1.6%	7.6%
Employment (Jobs)	430	450	410	490	520	540	550	530	-4.3%	3.1%
Tax Revenue	2.2	2.3	1.9	2.3	2.8	3.0	3.0	3.2	6.7%	5.3%
Local Tax Revenue	0.4	0.4	0.3	0.4	0.4	0.4	0.4	0.5	5.6%	3.8%
State Tax Revenue	1.9	1.9	1.6	1.9	2.4	2.5	2.6	2.8	6.8%	5.6%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Jefferson County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	11.4	10.9	10.6	13.2	16.6	17.6	17.8	18.4	3.3%	7.1%
Other Travel*	3.9	3.9	3.1	4.7	6.4	6.0	5.7	5.7	-0.3%	5.5%
Total	15.3	14.8	13.7	17.9	23.0	23.5	23.6	24.1	**2.4%**	**6.7%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	3.4	3.4	3.5	4.0	4.9	5.2	5.4	5.6	3.7%	7.1%
Overnight	7.9	7.5	7.1	9.2	11.7	12.3	12.4	12.8	3.1%	7.1%
Total	11.4	10.9	10.6	13.2	16.6	17.6	17.8	18.4	**3.3%**	**7.1%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	2.1	2.0	1.7	2.3	3.4	3.3	3.1	3.1	-0.3%	5.9%
Non-Transportation	9.3	8.9	8.9	10.9	13.2	14.3	14.7	15.3	4.0%	7.4%
Total	11.4	10.9	10.6	13.2	16.6	17.6	17.8	18.4	**3.3%**	**7.1%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	4.3	4.2	4.6	5.3	7.7	7.2	7.3	8.1	11.8%	9.5%
Employment (Jobs)	260	240	240	280	320	330	320	340	6.9%	4.1%
Tax Revenue	1.7	1.7	1.5	1.8	1.9	2.0	2.0	2.1	5.2%	3.0%
Local Tax Revenue	0.1	0.1	0.1	0.1	0.2	0.2	0.1	0.1	10.2%	8.2%
State Tax Revenue	1.6	1.6	1.4	1.8	1.8	1.8	1.9	2.0	4.9%	2.7%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Jerome County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	21.8	21.6	20.9	25.4	28.9	30.9	30.6	32.2	5.3%	5.7%
Other Travel*	3.2	3.2	2.5	3.6	4.8	4.4	4.3	4.3	-0.4%	4.2%
Total	25.0	24.8	23.3	29.0	33.8	35.4	34.9	36.5	**4.6%**	**5.5%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	4.6	4.6	4.6	5.2	6.0	6.4	6.4	6.7	4.7%	5.5%
Overnight	17.2	17.0	16.2	20.2	23.0	24.6	24.2	25.5	5.5%	5.8%
Total	21.8	21.6	20.9	25.4	28.9	30.9	30.6	32.2	**5.3%**	**5.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	3.4	3.2	2.9	3.7	4.7	4.6	4.4	4.4	1.1%	3.9%
Non-Transportation	18.4	18.4	18.0	21.7	24.2	26.3	26.2	27.8	6.0%	6.0%
Total	21.8	21.6	20.9	25.4	28.9	30.9	30.6	32.2	**5.3%**	**5.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	5.8	5.9	6.3	6.8	9.3	11.7	11.1	10.7	-3.8%	9.0%
Employment (Jobs)	270	270	290	290	300	350	330	300	-8.2%	1.7%
Tax Revenue	2.4	2.4	2.2	2.6	2.8	3.1	3.0	3.1	2.9%	3.6%
Local Tax Revenue	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	-5.2%	5.0%
State Tax Revenue	2.3	2.3	2.0	2.5	2.6	2.8	2.8	2.9	3.4%	3.6%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Kootenai County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	622.2	669.9	619.4	887.3	900.6	914.5	951.1	992.0	4.3%	6.9%
Other Travel*	28.3	29.5	23.2	35.0	42.3	40.3	39.8	40.9	2.6%	5.4%
Total	650.5	699.4	642.6	922.2	942.9	954.8	991.0	1,032.8	**4.2%**	**6.8%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	107.6	115.5	112.2	142.2	153.4	158.5	164.9	171.9	4.3%	6.9%
Overnight	514.6	554.5	507.2	745.1	747.3	756.0	786.2	820.1	4.3%	6.9%
Total	622.2	669.9	619.4	887.3	900.6	914.5	951.1	992.0	**4.3%**	**6.9%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	42.3	43.7	36.6	58.0	69.6	65.5	64.2	64.4	0.4%	6.2%
Non-Transportation	579.9	626.2	582.8	829.2	831.0	848.9	887.0	927.5	4.6%	6.9%
Total	622.2	669.9	619.4	887.3	900.6	914.5	951.1	992.0	**4.3%**	**6.9%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	240.5	260.0	243.9	314.6	341.8	368.8	388.8	408.2	5.0%	7.9%
Employment (Jobs)	8,430	8,850	7,950	9,560	9,700	9,990	10,200	10,170	-0.3%	2.7%
Tax Revenue	51.5	54.8	49.0	69.5	69.5	72.5	74.6	77.7	4.1%	6.0%
Local Tax Revenue	6.3	6.4	4.8	7.4	7.0	7.7	7.0	7.3	3.5%	2.1%
State Tax Revenue	45.2	48.5	44.2	62.1	62.5	64.8	67.6	70.4	4.2%	6.5%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Latah County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	32.0	32.0	23.1	34.1	40.8	42.8	42.3	44.8	5.9%	4.9%
Other Travel*	6.0	5.9	4.6	6.6	8.6	8.1	7.9	7.8	-0.8%	4.0%
Total	38.0	37.9	27.7	40.7	49.4	50.9	50.3	52.7	**4.8%**	**4.8%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	2.5	2.5	2.1	2.7	3.0	3.1	3.2	3.3	4.8%	4.4%
Overnight	29.6	29.5	21.0	31.5	37.8	39.6	39.2	41.5	5.9%	5.0%
Total	32.0	32.0	23.1	34.1	40.8	42.8	42.3	44.8	**5.9%**	**4.9%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	4.5	4.3	3.0	4.6	6.0	5.8	5.4	5.6	2.4%	3.1%
Non-Transportation	27.5	27.7	20.1	29.5	34.8	37.0	36.9	39.3	6.4%	5.2%
Total	32.0	32.0	23.1	34.1	40.8	42.8	42.3	44.8	**5.9%**	**4.9%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	10.2	10.6	9.4	10.9	12.3	13.2	13.7	14.3	4.7%	4.9%
Employment (Jobs)	670	670	580	610	600	640	650	680	5.0%	0.1%
Tax Revenue	3.9	3.9	2.9	3.9	4.1	4.3	4.3	4.5	4.8%	2.0%
Local Tax Revenue	0.2	0.2	0.2	0.2	0.2	0.3	0.2	0.3	3.2%	0.5%
State Tax Revenue	3.7	3.6	2.7	3.7	3.8	4.0	4.1	4.3	4.9%	2.1%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Lemhi County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	13.3	13.2	12.7	15.6	18.1	19.0	19.6	17.4	-11.1%	3.9%
Other Travel*	1.1	1.0	0.8	1.2	1.6	1.5	1.4	1.4	-0.7%	3.8%
Total	14.4	14.2	13.5	16.8	19.6	20.4	21.0	18.8	**-10.4%**	**3.9%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.5	0.5	0.5	0.6	0.6	0.7	0.7	0.6	-6.4%	3.1%
Overnight	12.8	12.6	12.2	15.0	17.4	18.3	18.9	16.8	-11.3%	3.9%
Total	13.3	13.2	12.7	15.6	18.1	19.0	19.6	17.4	**-11.1%**	**3.9%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	1.6	1.5	1.3	1.7	2.1	2.1	2.1	1.8	-13.9%	1.9%
Non-Transportation	11.8	11.7	11.4	13.9	15.9	16.8	17.5	15.6	-10.8%	4.1%
Total	13.3	13.2	12.7	15.6	18.1	19.0	19.6	17.4	**-11.1%**	**3.9%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	3.6	3.7	3.6	4.1	5.7	5.6	5.3	5.2	-0.5%	5.4%
Employment (Jobs)	200	200	190	210	230	200	180	180	1.1%	-1.3%
Tax Revenue	1.5	1.5	1.3	1.7	1.9	2.0	2.0	1.8	-9.2%	2.8%
Local Tax Revenue	0.3	0.3	0.2	0.3	0.4	0.4	0.4	0.3	-11.3%	3.7%
State Tax Revenue	1.2	1.2	1.1	1.4	1.5	1.6	1.6	1.5	-8.7%	2.6%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Lewis County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	3.2	4.3	4.6	5.9	5.9	6.3	6.2	5.7	-8.4%	8.7%
Other Travel*	0.5	0.5	0.4	0.5	0.7	0.7	0.6	0.6	-2.2%	2.2%
Total	3.7	4.7	5.0	6.4	6.6	6.9	6.8	6.3	**-7.8%**	**7.9%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.3	0.3	0.4	0.4	0.4	0.5	0.5	0.4	-5.3%	6.3%
Overnight	2.9	3.9	4.2	5.4	5.4	5.8	5.7	5.2	-8.6%	8.9%
Total	3.2	4.3	4.6	5.9	5.9	6.3	6.2	5.7	**-8.4%**	**8.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.5	0.6	0.6	0.8	1.0	1.0	0.9	0.8	-11.0%	5.9%
Non-Transportation	2.6	3.6	4.0	5.0	4.9	5.3	5.3	4.9	-7.9%	9.2%
Total	3.2	4.3	4.6	5.9	5.9	6.3	6.2	5.7	**-8.4%**	**8.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	0.7	1.3	1.2	1.3	1.5	1.5	1.6	1.7	2.9%	13.9%
Employment (Jobs)	50	90	80	80	60	60	60	70	4.8%	4.7%
Tax Revenue	0.3	0.4	0.4	0.5	0.5	0.5	0.5	0.5	-4.7%	6.0%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5%	10.0%
State Tax Revenue	0.3	0.4	0.4	0.5	0.5	0.5	0.5	0.5	-5.0%	5.8%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Lincoln County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	0.9	0.9	0.9	1.0	1.1	1.2	1.3	1.3	3.6%	6.6%
Other Travel*	0.7	0.7	0.5	0.8	1.0	1.0	0.9	0.9	-0.7%	3.5%
Total	1.6	1.6	1.4	1.8	2.2	2.2	2.2	2.3	**1.8%**	**5.2%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	3.1%	5.4%
Overnight	0.7	0.7	0.7	0.8	0.9	1.0	1.1	1.1	3.7%	6.8%
Total	0.9	0.9	0.9	1.0	1.1	1.2	1.3	1.3	**3.6%**	**6.6%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3	-1.0%	5.0%
Non-Transportation	0.7	0.7	0.7	0.8	0.8	1.0	1.0	1.1	4.8%	7.0%
Total	0.9	0.9	0.9	1.0	1.1	1.2	1.3	1.3	**3.6%**	**6.6%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	-4.3%	-1.5%
Employment (Jobs)	30	30	30	20	10	10	10	10	-14.3%	-18.4%
Tax Revenue	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	2.5%	-2.1%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-5.6%	1.0%
State Tax Revenue	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	2.8%	-2.2%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Madison County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	29.5	30.8	27.7	40.4	45.8	50.2	52.5	53.6	2.1%	8.9%
Other Travel*	5.2	5.2	4.0	7.8	10.5	9.5	9.1	8.9	-2.2%	7.9%
Total	34.7	36.0	31.7	48.1	56.3	59.7	61.6	62.5	**1.5%**	**8.8%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	6.1	6.2	6.0	8.5	9.7	10.6	11.0	11.3	2.5%	9.3%
Overnight	23.4	24.6	21.7	31.9	36.0	39.6	41.5	42.3	2.0%	8.8%
Total	29.5	30.8	27.7	40.4	45.8	50.2	52.5	53.6	**2.1%**	**8.9%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	4.4	4.4	3.7	5.8	7.6	7.7	7.6	7.6	-1.0%	7.9%
Non-Transportation	25.1	26.4	24.0	34.5	38.2	42.5	44.9	46.1	2.7%	9.1%
Total	29.5	30.8	27.7	40.4	45.8	50.2	52.5	53.6	**2.1%**	**8.9%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	9.5	9.9	9.4	11.7	13.0	13.8	15.6	16.4	5.5%	8.1%
Employment (Jobs)	570	600	530	650	620	630	680	690	1.6%	2.9%
Tax Revenue	3.6	3.7	3.1	4.6	4.5	4.8	5.1	5.2	2.6%	5.5%
Local Tax Revenue	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3	4.0%	3.7%
State Tax Revenue	3.4	3.4	2.9	4.3	4.2	4.5	4.8	4.9	2.6%	5.6%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Minidoka County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	25.2	24.5	18.7	24.5	27.9	31.4	29.5	28.9	-2.2%	1.9%
Other Travel*	2.8	2.7	2.1	3.2	4.2	3.9	3.7	3.7	-0.6%	4.3%
Total	28.0	27.2	20.9	27.7	32.2	35.3	33.3	32.6	**-2.0%**	**2.2%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	5.1	4.9	4.1	5.1	5.7	6.3	6.1	6.1	0.0%	2.7%
Overnight	20.2	19.6	14.6	19.4	22.3	25.1	23.4	22.8	-2.7%	1.7%
Total	25.2	24.5	18.7	24.5	27.9	31.4	29.5	28.9	**-2.2%**	**1.9%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	3.6	3.3	2.4	3.4	4.2	4.4	4.0	3.8	-4.4%	1.0%
Non-Transportation	21.7	21.2	16.3	21.1	23.7	27.0	25.5	25.1	-1.8%	2.1%
Total	25.2	24.5	18.7	24.5	27.9	31.4	29.5	28.9	**-2.2%**	**1.9%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	8.5	8.2	6.4	7.4	10.0	10.8	10.0	9.7	-2.5%	2.0%
Employment (Jobs)	420	380	290	310	340	350	300	290	-4.3%	-5.1%
Tax Revenue	2.8	2.7	2.0	2.6	2.8	3.1	2.9	2.8	-1.9%	0.1%
Local Tax Revenue	0.2	0.2	0.1	0.2	0.2	0.2	0.2	0.2	-3.9%	-2.8%
State Tax Revenue	2.6	2.5	1.9	2.4	2.6	2.8	2.7	2.6	-1.8%	0.3%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Nez Perce County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	72.4	80.9	69.3	87.5	93.6	96.1	104.6	104.2	-0.4%	5.3%
Other Travel*	17.3	16.0	8.3	12.2	19.0	16.5	20.3	18.3	-9.8%	0.8%
Total	89.7	96.9	77.6	99.7	112.6	112.6	125.0	122.6	**-1.9%**	**4.6%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	24.4	26.8	24.9	29.0	31.1	32.4	33.9	34.4	1.4%	5.0%
Overnight	48.0	54.2	44.3	58.5	62.4	63.7	70.8	69.9	-1.2%	5.5%
Total	72.4	80.9	69.3	87.5	93.6	96.1	104.6	104.2	**-0.4%**	**5.3%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	15.1	15.2	9.9	16.5	19.6	18.4	19.2	18.4	-4.6%	2.8%
Non-Transportation	57.3	65.7	59.4	71.0	73.9	77.8	85.4	85.9	0.6%	6.0%
Total	72.4	80.9	69.3	87.5	93.6	96.1	104.6	104.2	**-0.4%**	**5.3%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	29.8	36.3	31.1	35.2	38.1	41.1	42.9	44.8	4.5%	6.0%
Employment (Jobs)	1,100	1,330	1,180	1,280	1,260	1,270	1,280	1,280	0.3%	2.2%
Tax Revenue	7.0	8.0	6.6	8.3	8.2	8.6	9.1	9.2	1.3%	4.0%
Local Tax Revenue	0.9	0.9	0.6	0.9	0.9	0.9	0.9	0.9	1.2%	0.0%
State Tax Revenue	6.2	7.0	6.0	7.4	7.3	7.7	8.3	8.4	1.4%	4.4%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Oneida County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	2.5	2.3	2.2	2.5	2.6	2.8	2.9	3.2	10.9%	3.4%
Other Travel*	0.6	0.6	0.5	0.7	0.9	0.9	0.8	0.8	0.6%	4.7%
Total	3.1	2.9	2.7	3.2	3.5	3.6	3.7	4.0	**8.6%**	**3.7%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.8	0.7	0.7	0.8	0.8	0.9	0.9	1.0	7.7%	4.3%
Overnight	1.8	1.6	1.5	1.7	1.8	1.9	1.9	2.2	12.4%	3.1%
Total	2.5	2.3	2.2	2.5	2.6	2.8	2.9	3.2	**10.9%**	**3.4%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.4	0.4	0.3	0.4	0.5	0.5	0.5	0.5	5.1%	3.1%
Non-Transportation	2.1	2.0	1.9	2.1	2.2	2.3	2.4	2.7	12.0%	3.5%
Total	2.5	2.3	2.2	2.5	2.6	2.8	2.9	3.2	**10.9%**	**3.4%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	1.2	1.1	1.2	1.2	1.7	1.7	1.6	1.7	10.0%	5.6%
Employment (Jobs)	60	60	50	60	60	60	50	40	-18.0%	-5.1%
Tax Revenue	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.4	8.7%	1.1%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.5%	3.8%
State Tax Revenue	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	8.7%	0.9%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Owyhee County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	4.7	4.9	5.1	6.2	6.4	6.9	6.8	7.0	2.7%	5.8%
Other Travel*	1.6	1.5	1.2	1.8	2.4	2.2	2.1	2.0	-2.2%	4.0%
Total	6.3	6.5	6.3	7.9	8.8	9.1	8.9	9.0	**1.6%**	**5.4%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	2.1%	5.2%
Overnight	4.4	4.6	4.8	5.8	6.0	6.4	6.4	6.5	2.8%	5.8%
Total	4.7	4.9	5.1	6.2	6.4	6.9	6.8	7.0	**2.7%**	**5.8%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.8	0.8	0.7	1.0	1.3	1.2	1.2	1.1	-1.8%	4.8%
Non-Transportation	3.9	4.1	4.4	5.1	5.1	5.6	5.6	5.8	3.7%	6.0%
Total	4.7	4.9	5.1	6.2	6.4	6.9	6.8	7.0	**2.7%**	**5.8%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	1.6	1.8	1.9	2.1	2.6	3.1	3.0	3.2	9.1%	10.3%
Employment (Jobs)	140	140	160	170	190	180	200	210	7.6%	6.0%
Tax Revenue	0.7	0.7	0.6	0.8	0.7	0.8	0.8	0.8	4.7%	2.0%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	7.6%	7.2%
State Tax Revenue	0.7	0.7	0.6	0.7	0.7	0.7	0.7	0.7	4.5%	1.7%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Payette County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	5.5	5.9	6.1	7.1	8.2	8.6	8.8	9.3	6.1%	7.7%
Other Travel*	3.1	3.1	2.5	3.8	5.2	4.8	4.5	4.5	-1.0%	5.3%
Total	8.7	9.0	8.6	10.9	13.4	13.4	13.3	13.8	**3.7%**	**6.9%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	2.2	2.3	2.4	2.8	3.2	3.4	3.5	3.7	4.0%	7.5%
Overnight	3.3	3.5	3.7	4.3	5.0	5.2	5.3	5.7	7.5%	7.9%
Total	5.5	5.9	6.1	7.1	8.2	8.6	8.8	9.3	**6.1%**	**7.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	1.2	1.2	1.1	1.5	2.0	1.9	1.8	1.8	0.8%	6.1%
Non-Transportation	4.3	4.7	5.0	5.6	6.2	6.8	7.0	7.5	7.4%	8.2%
Total	5.5	5.9	6.1	7.1	8.2	8.6	8.8	9.3	**6.1%**	**7.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	2.1	2.2	2.4	2.6	3.1	4.0	3.5	3.5	1.0%	7.4%
Employment (Jobs)	120	130	120	130	110	150	130	130	-4.5%	0.5%
Tax Revenue	1.1	1.1	1.0	1.2	1.0	1.1	1.1	1.2	4.1%	1.2%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	-0.4%	7.0%
State Tax Revenue	1.0	1.1	0.9	1.1	1.0	1.1	1.1	1.1	4.4%	1.0%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Power County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	3.7	3.7	4.0	4.2	4.9	5.1	5.2	4.9	-5.9%	4.2%
Other Travel*	1.0	1.0	0.8	1.1	1.5	1.4	1.4	1.3	-3.1%	3.7%
Total	4.7	4.7	4.8	5.4	6.4	6.6	6.6	6.2	**-5.3%**	**4.1%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.4	0.4	0.4	0.5	0.5	0.6	0.6	0.6	-2.4%	4.4%
Overnight	3.2	3.2	3.5	3.8	4.3	4.6	4.6	4.3	-6.3%	4.2%
Total	3.7	3.7	4.0	4.2	4.9	5.1	5.2	4.9	**-5.9%**	**4.2%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.7	0.7	0.6	0.8	1.0	1.0	0.9	0.8	-7.1%	2.8%
Non-Transportation	3.0	3.0	3.4	3.5	3.8	4.2	4.3	4.0	-5.6%	4.5%
Total	3.7	3.7	4.0	4.2	4.9	5.1	5.2	4.9	**-5.9%**	**4.2%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	1.1	1.1	1.2	1.3	1.7	1.9	1.8	2.1	16.4%	10.4%
Employment (Jobs)	70	80	70	80	80	80	80	100	27.5%	5.7%
Tax Revenue	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5%	1.2%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	14.7%	7.6%
State Tax Revenue	0.5	0.5	0.4	0.5	0.5	0.5	0.5	0.5	-0.4%	0.8%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Shoshone County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	26.2	26.7	27.6	41.4	45.0	45.2	47.3	50.2	6.1%	9.7%
Other Travel*	1.7	1.7	1.3	2.0	2.7	2.4	2.3	2.3	-1.2%	4.3%
Total	27.9	28.4	28.9	43.3	47.7	47.7	49.6	52.5	**5.7%**	**9.4%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	4.0	4.1	4.2	5.7	5.9	6.0	6.4	6.8	6.3%	7.7%
Overnight	22.2	22.6	23.4	35.7	39.1	39.2	40.9	43.4	6.0%	10.0%
Total	26.2	26.7	27.6	41.4	45.0	45.2	47.3	50.2	**6.1%**	**9.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	3.5	3.5	3.2	5.3	6.4	6.1	6.2	6.4	3.6%	8.8%
Non-Transportation	22.7	23.3	24.4	36.1	38.6	39.1	41.1	43.8	6.5%	9.8%
Total	26.2	26.7	27.6	41.4	45.0	45.2	47.3	50.2	**6.1%**	**9.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	7.0	7.8	7.4	9.6	12.6	12.6	13.3	13.9	4.5%	10.3%
Employment (Jobs)	330	350	320	370	400	400	400	400	1.0%	3.0%
Tax Revenue	2.5	2.6	2.5	3.7	3.9	3.9	4.1	4.3	5.3%	7.9%
Local Tax Revenue	0.2	0.2	0.1	0.2	0.3	0.3	0.2	0.2	3.0%	4.8%
State Tax Revenue	2.4	2.4	2.3	3.4	3.7	3.7	3.9	4.1	5.5%	8.2%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Teton County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	35.8	43.1	46.2	72.9	79.2	82.2	89.6	105.8	18.1%	16.7%
Other Travel*	1.5	1.6	1.3	1.8	2.4	2.2	2.1	2.1	0.9%	4.8%
Total	37.3	44.6	47.5	74.7	81.6	84.3	91.7	108.0	**17.7%**	**16.4%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	2.0	2.3	2.4	3.2	3.8	4.0	4.4	5.1	15.9%	14.1%
Overnight	33.8	40.8	43.8	69.7	75.4	78.1	85.2	100.8	18.2%	16.9%
Total	35.8	43.1	46.2	72.9	79.2	82.2	89.6	105.8	**18.1%**	**16.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	3.5	3.9	3.6	5.8	7.7	7.7	8.0	9.2	15.0%	14.7%
Non-Transportation	32.3	39.2	42.6	67.1	71.5	74.4	81.6	96.7	18.4%	17.0%
Total	35.8	43.1	46.2	72.9	79.2	82.2	89.6	105.8	**18.1%**	**16.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	11.7	13.8	14.0	18.9	24.5	25.6	26.9	29.4	9.3%	14.1%
Employment (Jobs)	520	570	530	670	750	730	760	810	6.9%	6.6%
Tax Revenue	3.2	3.7	3.7	5.9	7.2	7.5	8.1	9.3	15.6%	16.8%
Local Tax Revenue	0.4	0.5	0.4	0.7	0.7	0.8	0.7	0.8	11.7%	11.1%
State Tax Revenue	2.8	3.3	3.3	5.3	6.5	6.7	7.3	8.5	16.0%	17.5%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Twin Falls County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	137.3	140.6	130.1	170.1	197.3	201.1	202.0	210.6	4.3%	6.3%
Other Travel*	22.7	24.4	13.4	19.3	23.6	23.5	27.3	27.6	1.2%	2.8%
Total	160.1	165.0	143.5	189.3	220.9	224.6	229.2	238.2	**3.9%**	**5.8%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	38.1	39.0	38.7	45.9	52.3	54.1	54.6	56.7	3.9%	5.9%
Overnight	99.2	101.6	91.5	124.2	145.0	147.0	147.3	153.9	4.5%	6.5%
Total	137.3	140.6	130.1	170.1	197.3	201.1	202.0	210.6	**4.3%**	**6.3%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	26.2	26.5	19.8	29.8	34.6	32.7	33.0	33.1	0.1%	3.4%
Non-Transportation	111.1	114.1	110.4	140.3	162.7	168.4	168.9	177.6	5.1%	6.9%
Total	137.3	140.6	130.1	170.1	197.3	201.1	202.0	210.6	**4.3%**	**6.3%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	45.0	49.3	47.5	54.7	62.3	68.1	71.2	75.3	5.8%	7.6%
Employment (Jobs)	2,240	2,410	2,240	2,510	2,580	2,650	2,740	2,780	1.5%	3.2%
Tax Revenue	13.8	14.2	12.7	16.5	17.5	18.3	18.5	19.3	4.7%	4.9%
Local Tax Revenue	1.2	1.2	0.9	1.3	1.3	1.5	1.3	1.4	4.3%	1.9%
State Tax Revenue	12.6	12.9	11.8	15.2	16.2	16.9	17.1	17.9	4.7%	5.1%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Valley County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	113.0	127.9	137.8	167.9	194.6	206.6	200.6	215.5	7.4%	9.7%
Other Travel*	2.1	2.2	1.7	2.6	3.2	3.1	3.1	3.2	2.6%	6.1%
Total	115.1	130.1	139.6	170.5	197.8	209.7	203.7	218.6	**7.3%**	**9.6%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	2.9	3.2	3.3	3.8	4.4	4.7	4.7	5.0	5.7%	7.9%
Overnight	110.1	124.7	134.5	164.1	190.2	201.8	195.9	210.4	7.4%	9.7%
Total	113.0	127.9	137.8	167.9	194.6	206.6	200.6	215.5	**7.4%**	**9.7%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	9.8	10.3	9.5	12.6	17.1	16.8	15.5	16.1	3.6%	7.3%
Non-Transportation	103.2	117.6	128.4	155.3	177.5	189.8	185.1	199.4	7.7%	9.9%
Total	113.0	127.9	137.8	167.9	194.6	206.6	200.6	215.5	**7.4%**	**9.7%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	38.1	41.6	43.1	49.4	54.6	65.1	69.5	74.6	7.3%	10.1%
Employment (Jobs)	1,430	1,490	1,420	1,530	1,520	1,740	1,750	1,860	6.3%	3.8%
Tax Revenue	10.6	11.9	12.3	15.5	16.9	18.5	18.2	19.5	7.1%	9.0%
Local Tax Revenue	1.7	1.8	1.8	2.4	2.5	2.8	2.6	2.7	6.3%	7.3%
State Tax Revenue	9.0	10.0	10.5	13.1	14.4	15.7	15.6	16.7	7.3%	9.3%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

County Travel Impacts

Washington County / Direct Travel Impacts

	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR** 18-25
Direct Travel Spending ($Millions)										
Visitor	4.0	4.0	4.1	4.9	5.4	6.3	6.2	6.5	6.2%	7.4%
Other Travel*	1.4	1.3	1.0	1.6	2.1	2.0	1.9	1.9	-1.2%	4.8%
Total	5.3	5.3	5.1	6.5	7.5	8.3	8.1	8.4	**4.5%**	**6.8%**
Direct Visitor Spending by Trip Type ($Millions)										
Day	0.5	0.5	0.5	0.6	0.7	0.7	0.7	0.8	4.5%	6.4%
Overnight	3.5	3.5	3.6	4.4	4.7	5.5	5.4	5.8	6.4%	7.6%
Total	4.0	4.0	4.1	4.9	5.4	6.3	6.2	6.5	**6.2%**	**7.4%**
Direct Visitor Spending by Commodity Type ($Millions)										
Transportation	0.6	0.6	0.6	0.7	0.9	1.0	0.9	0.9	1.4%	5.2%
Non-Transportation	3.3	3.4	3.5	4.2	4.5	5.3	5.3	5.6	7.0%	7.8%
Total	4.0	4.0	4.1	4.9	5.4	6.3	6.2	6.5	**6.2%**	**7.4%**
Direct Travel Impacts ($Millions Except Employment (Jobs))										
Earnings	1.2	1.3	1.3	1.6	1.6	1.8	2.1	2.4	12.4%	10.7%
Employment (Jobs)	70	70	70	80	70	70	80	80	5.0%	3.5%
Tax Revenue	0.6	0.6	0.5	0.7	0.6	0.7	0.7	0.7	6.7%	3.1%
Local Tax Revenue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.8%	8.0%
State Tax Revenue	0.6	0.6	0.5	0.6	0.6	0.6	0.7	0.7	6.5%	2.8%

Source: Dean Runyan Associates

*Other travel spending includes resident air travel, travel arrangement, convention services, and ground transportation of visitors traveling to other Idaho destinations.

**Compound Annual Growth Rate

Glossary

Term	Definition
2nd Home	Homes under private ownership for personal use as a seasonal property where a lodging tax is not collected.
Day Travel	A trip that involves non-routine travel of greater than 50 miles to the destination but no overnight stay in the destination.
Destination Spending	Direct spending made by visitors in a destination. Interchangeable with "Visitor Spending."
Direct Earnings	Total after-tax net income from travel. It includes wage and salary disbursements, proprietor income, and other earned income or benefits.
Direct Employment	Employment generated by direct travel spending. It includes full-time employees, part-time employees, seasonal employees, and proprietors.
Direct Spending	Expenditures made by consumers, combination of Visitor Spending and Other Spending.
Hotel, Motel, STVR	Accommodation types that house transient lodging activity.
Local Taxes	City and county taxes generated by travel spending.
Other Overnight	Combination of other overnight visitors who stay in campgrounds or 2nd homes.
Other Spending	Spending by residents on travel arrangement services and/or spending for convention activity.
Private Home (VFR)	Personal residences used to host friends and family visiting overnight in the destination.
State Taxes	State taxes generated by travel spending.
STVR	STVR stands for "short term vacation rental." The category includes private and semi-private lodging rented by owners or property management companies (e.g., Airbnb & VRBO).
Visitor Spending	Spending by visitors in a destination.

Methodology

Travel Impacts Methodology

Primary travel impact analysis will make use of the Regional Travel Impact Model (RTIM), prepared and maintained by Dean Runyan Associates and used for most of our travel impact analysis since 1985. This model was developed to provide robust impact findings at small geography without reliance on annual survey research. This is a "bottom up" approach whereby analysis is conducted at the county level, then aggregated to regions and the state, allowing us to use the most detailed tax, employment, wages, and other data that are available. Our clients have selected this approach to provide particularly detailed and defendable findings for all parts of their constituency.

Because the model does not rely on annual survey research for its primary inputs, we work in other states with a variety of other visitor profile providers, including national panel managers or those making use of intercept or regional web methodology.
Analysis is conducted separately by type of visitor lodging, making use of data and modeling appropriate to each. Impact analysis associated with visitors staying in commercial lodging makes use of lodging tax data to calculate lodging sales, then employs expenditure distribution data for these types of visitors to calculate total sales and the distribution among expenditure categories. We maintain our own expenditure distribution database for each state we work in but also make use of historic and current expenditure data, as available. Rental cabins, condos and other property are included in this category if lodging tax has been applied to sales.

Earnings, employment, and tax receipts are calculated using employment and wage data by business category, for each county, plus the applicable taxes on each type of expenditure. Tax impacts, such as for restaurant, fuel, and retail purchases, are calculated from spending amounts; totals will be checked against data from state sources.

Sales attributed to campers are calculated from campground inventory (separately for public and commercial campgrounds), camping occupancy data and average expenditures for camping parties. Expenditure data will be from expenditure databases that we maintain, augmented by visitor survey data available for Idaho, as available.

Other impacts are calculated in a manner like those for commercial accommodation travelers. Sales attributable to travelers staying in their own second homes, or in rented condo, cabin, and other accommodations, are calculated from inventories of these types of lodging and the associated utilization and expenditure data. Findings are made consistent if some of these sales have been subject to lodging tax. Second home inventories are from US Census sources and any local/regional data available. Other impacts are calculated in a manner like those for commercial accommodation travelers.

Methodology

Travel Impacts Methodology

Day travel spending is calculated as a factor of overnight spending, with the proportions based on visitor data for Idaho travelers. This analysis will rely the most on visitor profile data provided by the profile contractor. Other impacts are calculated in a similar way as those for commercial accommodation travelers.

All spending estimates are summed for each county and separately for each business category with applicable data then used to calculate earnings, employment, and tax receipts. County totals will be mapped to regions using address and other location data for lodging, camping, and other rental accommodations using separate methods for each type of lodging.

In all cases, our data and methodology are transparent, allowing for reliable error trapping and effective review of findings. All findings are also checked against available comparable data, such as county-level employment data by industry from the US Bureau of Labor Statistics and lodging sales data from STR and Key Data.

The table below demonstrates how our reported "Travel Industries" translate to the North American Industry Classification System (NAICS) codes.

Travel Impact Industry	NAICS Industry Code
Accommodation & Food Service	Accommodation (721) Food services and drinking places (722) Residential property managers (531311) Breweries, wineries, distilleries (312120, 312130, 312140)
Arts, Entertainment, & Recreation	Arts, entertainment, and recreation (71) Scenic and sightseeing transportation (487) Motion picture and video exhibition (51213) Recreational goods rental (532292) Tour operators (56152)
Retail	Food & beverage stores (445) Gasoline stations (447) Clothing and clothing accessories (448) Sporting goods, hobby, book and music stores (451) General merchandise stores (452) Miscellaneous store retailers (453)
Transportation	Rail transportation (482114) Water transportation (4831) Urban transit systems (4851) Interurban and rural bus transportation (4852) Taxi and limousine service (4853) Charter bus industry (4855) Passenger car rental (532111) Truck, trailer, and RV rental and leasing (53212) Parking lots and garages (812930)
Air Transportation	Scheduled passenger air transportation (481111) Support activities for air transportation (4881)
Others	Travel agencies (56151) Convention and trade show organizers (56192)

Note: Travel spending on breweries (312120), wineries (312130) and distilleries (312140) is included within the Food Service, Retail, Food Stores, and Recreation industries. It is likely that the bulk of travel-related spending on these alcohol-related NAICS codes occurs within the Food Service category. However, because experiences at breweries, wineries, and distilleries often include a significant experiential component, as well as opportunities for retail purchases, we are unable to allocate exact percentages to the above travel impact categories. NAICS codes are based on responses from individual organizations and are not always a perfect 1:1 alignment with our analysis.



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