

A photograph of a doctor with short grey hair and glasses, wearing a white lab coat, leaning over a baby lying on a table. The doctor is using a stethoscope to examine the baby's chest. The scene is brightly lit, likely from a window, creating a warm and professional atmosphere.

THE ECONOMIC IMPACT OF MONTANA'S HOSPITALS

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**BUREAU OF BUSINESS AND
ECONOMIC RESEARCH**
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Executive Summary

This is a study of the contributions made to the economy of the state of Montana by the production, employment, spending and tax revenues that can be attributed to 58 of the state's hospitals. Hospitals high paying jobs, high value-added production, and significant tax payments add to the state economy in their own right. As the dollars paid to employees, vendors and governments are in turn respent in the economy, their ultimate significance grows. The Bureau of Business and Economic Research (BBER) at the University of Montana was retained by the Montana Hospital Association (MHA) to carry out an analysis how Montana hospitals enhance the state's economy. This report summarizes and documents the results.

Our basic finding is that Montana hospitals generate considerable economic prosperity, not only for the communities in which they are located, but for the state as a whole. In terms of measurable economic activity, we find that the state's hospitals ultimately support:

- About 83,900 permanent, year-round jobs across the state;
- Over \$6.3 billion of annual, recurring income received by Montana households, of which \$5.7 billion is disposable, after-tax income;
- State tax and nontax revenues of approximately \$1.5 billion per year;
- Over \$16 billion in added economic output annually; and
- About 147,500 additional state residents.

Table 1. Statewide economic impacts

Category	Units	Impact	% of state
Total Employment	Jobs	83,881	12.1%
Personal Income	\$ millions	\$6,359.5	13.4%
Disposable Personal Income	\$ millions	\$5,721.1	13.4%
Output	\$ millions	\$16,129.8	16.4%
Population	People	147,455	13.7%
Tax revenues	\$ millions	\$1,502.8	-

In addition to providing the overall state economic impact, we also report the impacts of 58 individual hospitals across the state. The impacts reported in this study undercount the actual economic contributions made by providing health services. This is because the economic contributions we present do not include the value of the service provided – the physical health of Montana's workforce, a key component of economic vitality.

To calculate the economic impact of Montana hospitals this research report addresses the theoretical question: How does the state economy differ from one without Montana hospitals? The question calls for a comparison of two states of economic activity. The first is the actual economy as it exists today. The second hypothetical economy is a representation of economic activity that would occur with the spending, production, employment and tax revenue associated with the hospitals removed. BBER used its state of the art economic model, leased from Regional Economic Models, Inc. (REMI), to produce a picture of the economy as it would exist in a no hospital scenario. Such an economy would lose not only the substantial spending and income flows that health care creates, but also the subsequent rounds of income, spending and employment that are created, as those flows ripple through the state economy. The REMI model recognizes those linkages and thus is a useful tool for deriving the ultimate contribution of hospitals to the economy of Montana.

Secondly, this report also investigates the cross-county flows of hospital patients. Using data available from the COMPdata Analytics we analyzed the cross-county billing patterns of every hospital and county in Montana. From this we track how dollars flow from patient counties to hospitals. Counties with smaller health facilities

bill almost entirely too in-county patients. On the other hand, as expected, counties with larger hospital facilities, such as in Yellowstone or Gallatin counties, bill a relatively large percentage to out-of-county patients and provide those services to a larger number of counties. This is done for the 44 counties with health care facilities.

Objective of the Study

This report revisits and enhances the analysis of the connection between Montana hospitals and the economies of the regions they serve that the BBER conducted for the Montana Hospital Association (MHA) in 2019. The emphasis of the updated study is on the linkages between hospitals and the economy of the individual counties they serve.

While hospitals have a highly visible role as acute care providers in the communities they serve, the connections between their operations and economic vitality are less defined. Yet the relationship is strong, for three primary reasons:

1. In most of those communities, the hospital is either the largest or one of the largest employers, paying wages that on average are higher than the overall average in the community;
2. Hospitals attract significant dollar flows into the community that originate from outside the local economy, particularly federal dollars in support of programs like Medicare and those supporting medical research and education;
3. Hospitals in particular, and health care in general, are labor intensive services that have a large locally produced component. Therefore, a comparatively large fraction of spending on hospitals is paid out as wages and thus remains in the economy.

These connections give communities an important stake in maintaining the economic viability of local hospitals. Indeed, that stake goes much further than the spending linkages noted above. The continued accessibility of high quality hospital services is fundamental for the vitality of any region. Areas which lack such access can face serious hurdles in attracting and retaining businesses and investment that can sustain their economic livelihoods and, more importantly, maintain the health of residents.

Two recent events of particular importance to hospitals come to mind in demonstrating these connections. The first was the decision of the Montana Legislature to participate in the expansion of eligibility for the federal/state Medicaid program. This allowed more low-income families to qualify and gave those receiving benefits better access to care. It also eased the financial pressures on smaller hospitals caused by unpaid care. More recently, the COVID-19 related swings in elective surgeries and other procedures have caused some cutbacks and curtailments, adding to the overall economic challenges currently posed by the pandemic in ways that were unanticipated.

This study is an update of an earlier study of the economic contribution of Montana hospitals and health care centers to the Montana economy conducted in 2019. Since that study, considerable changes have occurred in the Montana economy and health care sector. Based on actual expenditure patterns and employment provided by hospitals for 2019, the total economy wide effects on employment and income are quantified. This analysis uses a different, but more sophisticated modelling technique to measure the economic impacts than in the previous study and should prove to be more accurate.

Benefits of the Study

Several potential benefits of the study are noteworthy. First, by understanding the share of the Montana economy that Montana hospitals are responsible for, the potential ramifications of changes in health care brought to the forefront by health care legislation passed in 2016 and extended in 2019, may be better understood. Second, the demand for health care is expected to accelerate due to health reform, an aging baby boomer population and advances in technology which extend life. A firm grasp of the baseline will help health care management officials prepare for future demands placed on the health care sector. Third, the health care industry is typically viewed only from the vantage point of hospitals, physicians, long-term care facilities or ambulatory surgery centers. The industry however extends well beyond these traditional sectors of health care. Today, vocational training programs for health care professionals, medical device manufacturers, and

biomedical research and development – to name just three industries – also play an important role in economic development. Finally, recognition of the vital role hospitals assumes to the future vitality of the regional economy elevates this industry's importance once its full impacts are known.

Policy Analysis with the REMI Model and County Billing Flows

Regional economic impacts occur because of events or activities that create new expenditures within a region. "New spending" constitutes spending that is over and above existing expenditures, and which does not displace other spending elsewhere in the region. It not only adds to economic activity in its own right, but also induces further spending when the recipients of wages, sales and tax revenues spend portions of their income in the local economy. Changes in the paths of investment, migration, prices and wages are also possible. This study utilized an economic model, calibrated to represent the interactions specific to the Montana economy to estimate the economic impacts resulting from operations at the Montana hospitals.

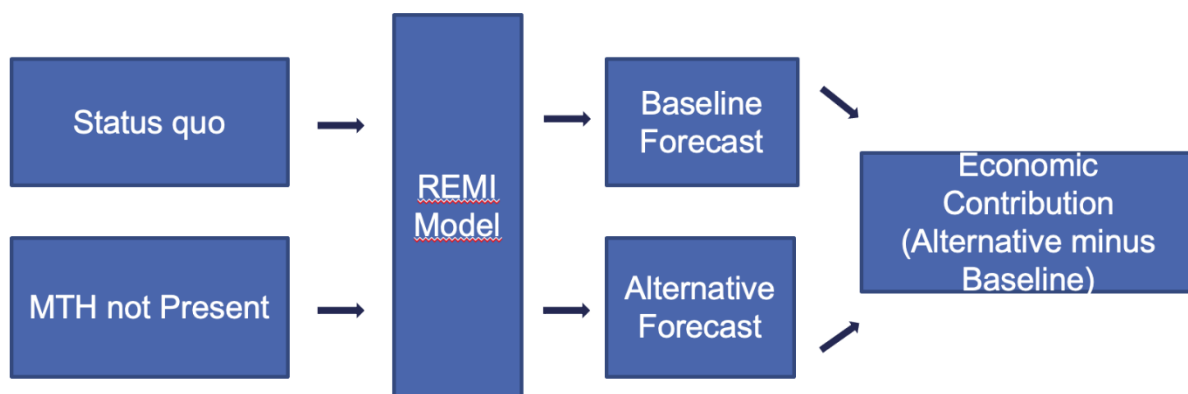
Leased from Regional Economic Models, Inc., the REMI model is one of the best known and most respected analytical tools in the policy analysis arena and has been used in more than 100 previous studies, as well as in dozens of peer-reviewed articles in scholarly journals. It is a state-of-the-art econometric forecasting model that incorporates dynamic feedbacks between economic and demographic variables. The REMI model forecasts employment, income, expenditures, and populations for counties and regions based on a model containing over 100 stochastic and dynamic relationships, as well as a number of identities. A full explanation of the design and operation of the model can be found in Treyz (1993).¹

We performed an assessment of the total contribution of the Montana's hospitals to the Montana and regional economies by examining (a) the scale and scope of their production activities and (b) the linkages between those activities and the rest of the state economy. Those linkages are captured by BBER's policy analysis model, the REMI model. Using this analytical tool, it is possible to compare the actual economy to what would exist if the hospitals were not present. This study had access to the financial records of the hospitals so that full detail on their expenditures could be faithfully represented in the analysis.

The REMI Modeling Methodology

The basic research approach used in this study is depicted graphically in Figure 1 below – MTH stands for Montana hospitals and health care centers. The results of this study involve a comparison of two scenarios for the Montana economy. The baseline scenario reflects "status quo" assumptions concerning the hospitals. This produces a baseline projection of economic activity, as measured by jobs, income and population.

Figure 1. Economic impact analysis with the REMI model



A second projection of the Montana economy assumes that the hospitals are not present. In this hypothetical, no-hospitals economy the jobs, production and income that are associated with the hospitals are removed. These direct impacts are obtained from hospital financial records. The economic impacts are tailored to the

¹ Treyz, George I. (1993). *Regional Economic Modeling: A Systematic Approach to Economic Forecasting and Policy Analysis*. Norwell, Massachusetts: Kluwer Academic Publishers.

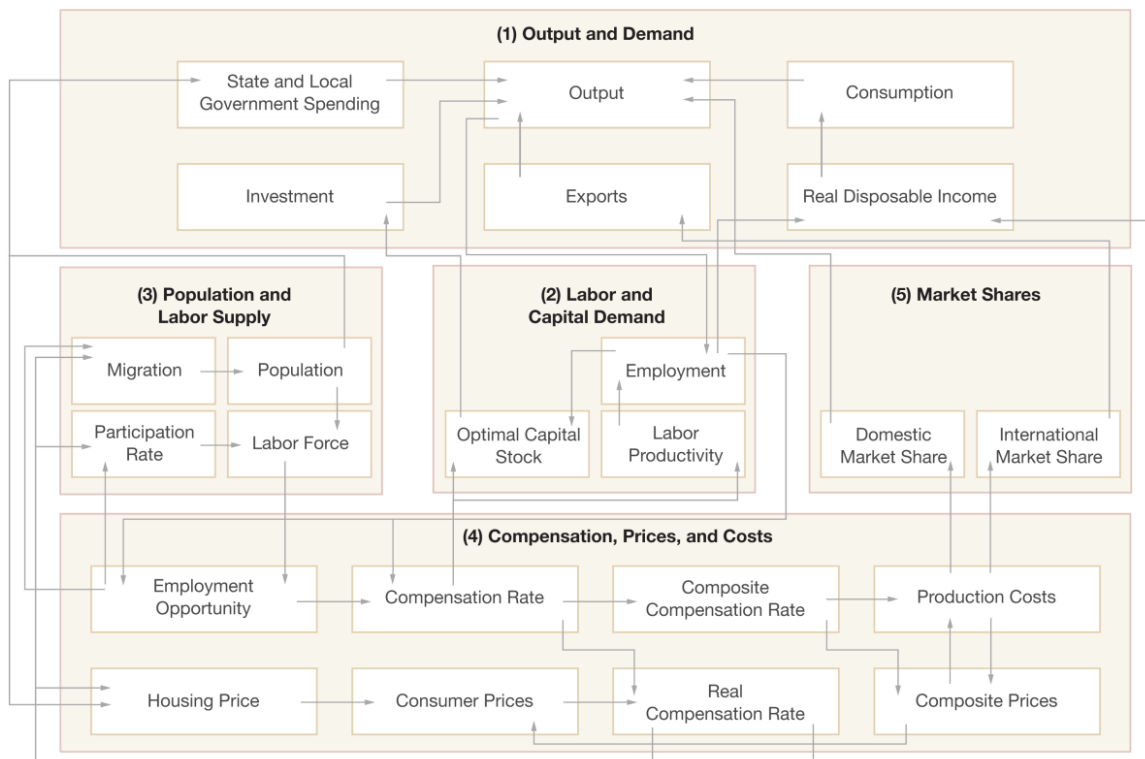
health care industry. This was provided to BBER by the Montana Hospital Association. Individual impacts were done for each of the hospitals in the sample.

BBER's economic model is then used to project the jobs, income and population that would result if the hospitals were not present. Since the spending and production of Montana's hospitals is received as income and inputs by others in the economy, and is in turn re-spent in the economy, this total impact will be larger than the direct impact of the hospitals themselves.

The economic contributions reported in this report are the difference between two scenarios for the state economy: the status quo economy that exists today and a no-hospital scenario that is carefully constructed using BBER's economic model. The no-hospital economy not only is missing the hospital's production, employment and spending, but also the jobs and income in the state economy that are ultimately supported by health activities.

The REMI model utilizes historical data on production, prices, trade flows, migration and technological advances to calibrate the relationship between five basic blocks of the state economy: 1) output and demand; 2) labor and capital demand; 3) population and labor supply; 4) compensation, prices and costs; and 5) market shares, as shown in Figure 2.

Figure 2. REMI model linkages



The differences in production, labor demand and intermediate demand associated with the absence of the hospitals impact these blocks, causing them to react to the changes and adjust to a new equilibrium. This new equilibrium constitutes the alternative scenario referred to above – the absence of hospitals.

The underlying philosophy of the REMI model is that regions throughout the country compete for investments, jobs and people. When events occur in one region, they set off a chain reaction of events across the country that causes dollars to flow toward better investment and production opportunities, followed over time by workers and households toward better employment opportunities and higher wages. The REMI model consists of an 82-sector input/output matrix that models the technological interdependence of production sectors of the economy, as well as extensive trade and capital flow data. Together, these components enable the estimation of the shares of each sector's demand that can be met by local production.

The Economic Contributions of Montana Hospitals

The analysis of the economic impact of Montana hospitals can be conceptually broken down into three separate and distinct components:

- *Direct effects:* Payroll, vendor purchases, tax payments and other economic flows that come from the operations of the facility itself.
- *Indirect effects:* Comprises other economic activities which are connected to hospitals but are not part of the facility itself.
- *Induced effects:* Direct and indirect spending is received as income by individuals, businesses and governments within the state, and re-spent in the economy, supporting additional jobs and income streams, such as the retail and restaurant industries, the so-called "multiplier."

County Level Billing Flows

To understand how Montana residents use hospitals across the state, we provide data on services billed by hospitals to any given county's patients, by percent. For example, about 80% of Beaverhead County's Barret Hospital & HealthCare is billed to Beaverhead County residents and 12.5% are billed to residents of Madison County. Put another way, roughly 12% of Barret Hospital's services are provided to Madison County. This is useful because as a rural state, it is important to understand how residents get their care.

As expected, counties with larger and more specialized acute care facilities, such as Yellowstone, have a smaller percentage of billing to Yellowstone County residents, because much of their services are provided to smaller outlying counties, which do not have the expertise to conduct all types of medical care. Yellowstone County hospitals bill roughly 40% to other counties. Given that some hospitals provide service to out of state patients, we also provide the amount of services billed to non-Montana residents.

Health Care Background Information

The health care industry is important not only for its contribution to income, expenditures and employment, but also as a catalyst for economic development in general. Access to health care is an important determinant for people and businesses choosing to locate in Montana. Healthy populations are more productive and can direct their income to other sectors in the economy, creating jobs and economic prosperity.

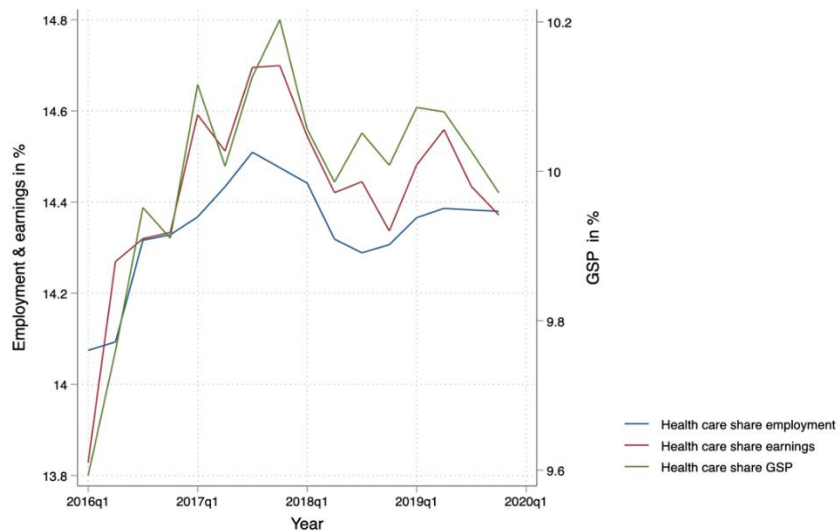
Health Care in Montana

In the years following health care reform that has now become law, it is important to continue to recognize the economic contribution of various industries in health care to the overall welfare and economy of Montana. The role medical care plays in the Montana economy has been most recently analyzed when Montana expanded Medicaid in 2015 and extended it in 2019. According to a BBER report, the extension of Medicaid in Montana contributed an additional 5,000 jobs and \$270 million additional income to the Montana economy.² This is due to the labor intensive nature of health care delivery which contributes to generating jobs and income across all sectors of the Montana economy. To this day, the health care sector continues to grow providing important jobs and generally above average incomes.

Not only is the health care sector providing badly needed jobs during the present slow economic recovery, the trend in value added (VA) per full-time equivalent (FTE) job since 2005 has been favorable as well. Value added is the wage and salary income paid in health care, along with proprietor's income, and other property type income, such as interest and profits in health care.

Figure 3 shows health care's share of employment, labor earnings and output in Montana. Health care employment and earnings are on the left axis. Between 2016 and 2019, health care's share of employment has grown from about 14.1% to 14.5% of total nonfarm employment. Earnings follows a similar pattern, rising from about 14% before settling in about 14.5% in 2018. Health care's share of gross state product (GSP, right axis), a measure of output, rose 0.5% in the five years since 2016. It's difficult to ascertain what the effects of extending Medicaid will have on health care's share as it coincided with the COVID-19 pandemic.

Figure 3. Health care share of employment, earnings and output



(Source: Bureau of Labor Statistics)

The health care sector in Montana has grown more quickly than the overall economy, particularly after the expansion of Medicaid. Figure 4 compares health care employment to overall nonfarm employment using an

² Ward, B. and B. Bridge (2018). "The Economic Impact of Medicaid Expansion in Montana," Bureau of Business and Economic Research, University of Montana, April.

index, 2016Q1=100. Health care employment has grown significantly relative the overall economy. By the end of 2019 employment in the health care industry was about 8.5% larger than it was in 2016, whereas overall nonfarm employment was about 4% bigger.

Figure 4. Index of overall and health care employment in Montana

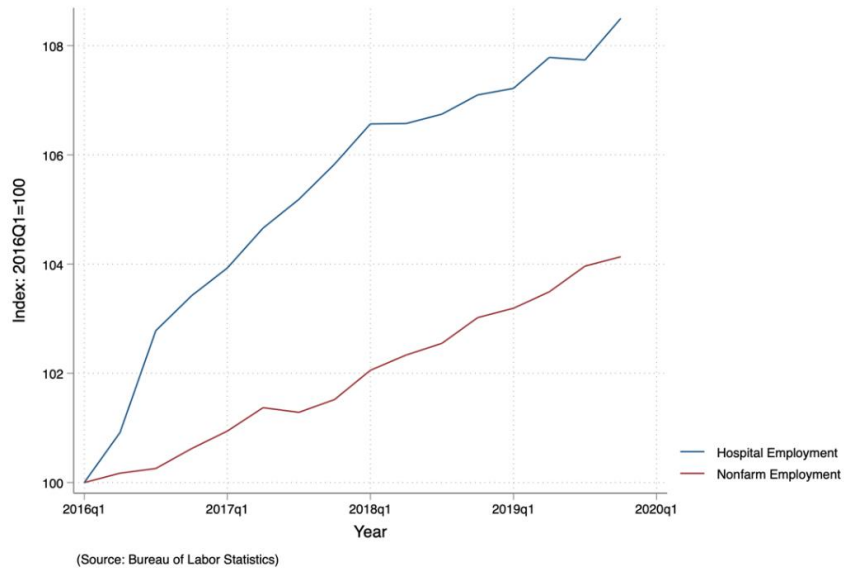
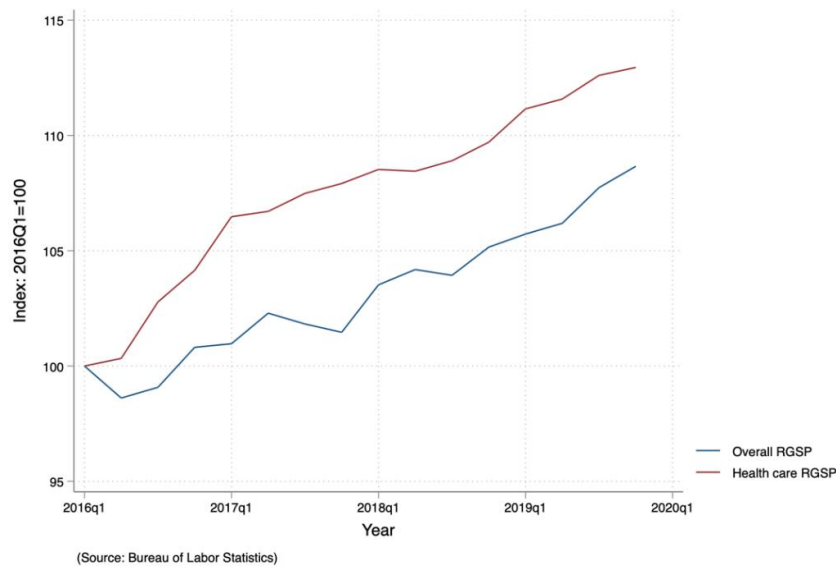


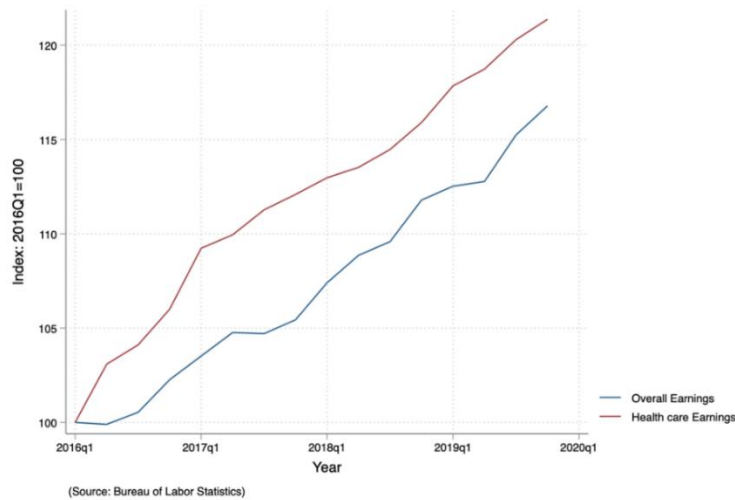
Figure 5. Index of overall and health care output (GSP) in Montana.



This is mirrored in the growth of health care output, as measured by real gross state product (GSP) – see Figure 5. The figure shows that health care grew faster than the overall economy following the first extension of Medicaid in 2016, and since 2017 the Montana and health care economies have grown at roughly the same rate. You can also see that as the overall economy decelerated during 2016-2017, the health care industry continued to grow. Both of these observations are echoed in earnings for the overall economy and health care in particular – see Figure 6. While statewide Montana earnings have increased substantially since 2016,

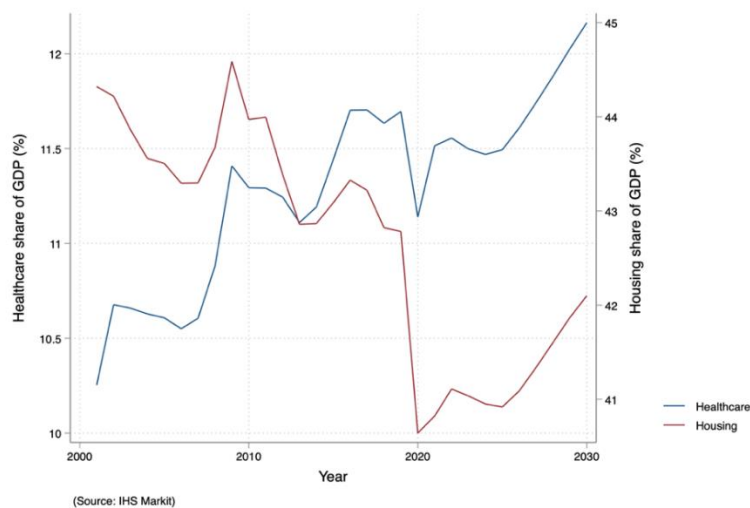
health care earnings outpaced them and by 2019 were about 21% higher, overall earnings were 17% higher than in 2016.

Figure 6. Index of overall and health care earnings in Montana



These data demonstrate the growing importance of the health care sector, including hospitals, in the Montana economy. Given the current health environment, possible policy changes in health insurance with a new administration, and demographic dynamics as the state ages naturally and retiree immigration from other states, highlights the importance of the health care industry. IHS Markit forecasts of health care as percentage of GDP can be found in Figure 7. Housing services as a share of GDP is included to put health care's importance to the economy in perspective. By 2030, health care is forecast to be about \$2.9 trillion or about 12.1% of GDP. Over the same period, investment in housing, the largest single household expenditure is expected to be about 42% of GDP and defense spending roughly 3.25%. A recent report by the World Health Organization provides evidence for the role the health care sector plays on economic activity.³

Figure 7. Health care share of GDP, 2000-30



³ Buchan J, Dhillon IS, Campbell J, editors. *Health Employment and Economic Growth: An Evidence Base*. Geneva: World Health Organization; 2017.

Hospitals in Montana

Montana hospitals have similarly experienced growth. Table 2 shows hospital (NAICS 622) employment, total wages and salary, and average annual pay in 5-year increments between 2005 and 2019. Also tabulated are the annual growth rates for those years. Over the 15-year period, employment growth in Montana hospitals is 28% higher in 2019 than 2005, total wages are an impressive 116% higher, and average pay almost 70% more. To put that in perspective, over the same period, statewide employment, total wages and average annual pay rose 13.8%, 75.2%, and 54% respectively. Also included are the gross growth rates of natural resources and mining, manufacturing, and leisure and hospitality to show how health care has grown relative to other important sectors in the Montana economy.

Table 2. Employment and income for Montana hospitals

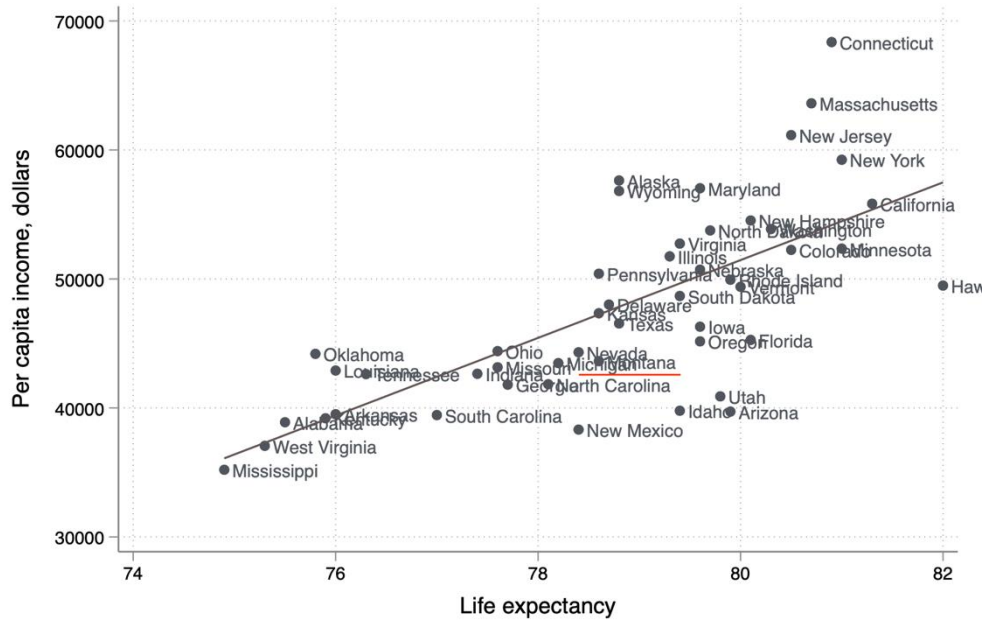
Year	Employees		Wages		Annual pay	
	Total	Annual Growth	Total (,000s)	Annual Growth	Average	Annual Growth
2005	19,824	3.6%	\$765,682	8.1%	\$38,623	4.4%
2010	20,546	0.9%	\$1,007,581	3.5%	\$49,040	2.7%
2015	22,346	-0.2%	\$1,309,607	5.4%	\$58,606	5.7%
2019	25,297	1.0%	\$1,657,259	5.0%	\$65,511	4.0%
Growth 05-19						
Hospitals	27.6%		116.4%		69.6%	
All sectors	13.8%		75.2%		54.0%	
NatRes/Mining	14.6%		69.6%		47.9%	
Manufacturing	7.5%		50.3%		39.8%	
Leisure/Hospitality	21.4%		104.9%		104.9%	

Source: U.S. Bureau of Labor Statistics.

In addition to providing direct economic impact, health also contributes to long term economic growth through improvements to human capital. Healthier workers tend to more productive fostering economic growth. There is a considerable amount of research literature on the impacts of health on economic growth, which demonstrates a positive relationship between the health of an economy's population and economic activity.⁴ Using life expectancy as a proxy for health, common in the literature, we can see the distinct positive relationship between health and per capita income in the United States in 2015 in Figure 8, Montana is underlined in red.

⁴ Weil, David, (2014), "Health and Economic Growth" in *Handbook of Economic Growth*, Vol. 2, p. 623-682, Elsevier.

Figure 8. Life expectancy and per capita income



Economic Impact Analysis

We have data for 56 hospitals across 36 counties. In this section we provide economic impacts for each hospital in our sample and the patient flow into the county for medical services. To quantify patient flows we provide percentages of total billing for each county if hospital billing was at least 0.5% of total billing. Economic impacts by hospital are total number of direct and indirect jobs supported; total personal income and after-tax, disposable income; economic output created; and total population which results from county hospitals. For counties with multiple hospitals, we provide the individual and aggregate level of economic impact. Results are presented in alphabetical order by county.

Dictionary of Economic Impact Data

Definitions of the impact data presented are the following, see the section "The Economic Contributions of Montana Hospitals" for a description of the decomposition of the effects:

- *Jobs*: Total direct, indirect, and induced jobs that can be attributed to Montana hospitals.
- *Personal income*: Earnings from wages and salaries, including other sources of income, such as benefits, interest income, proprietor income, etc., in millions of dollars.
- *After-tax personal income*: Personal income after taxes, in millions of dollars.
- *Output*: Total output which is directly and indirectly related to activities of hospitals – this includes both final and intermediate sales, in millions of dollars.
- *Population*: Total inflow of new people associated with Montana hospitals, including spouses, children and other dependents.
- *Taxes*: Revenues generated from hospital related activities, in millions of dollars.

See the Bureau of Economic Analysis website for more details on data definitions.

Statewide Economic Impacts

Before we look at individual hospital and county level analysis, we begin with the aggregate economic impacts of all hospitals in the study. Our basic finding is that Montana hospitals generate considerable economic activity, which can be found in Table 3.

Table 3. Aggregate economic impacts of Montana hospitals, 2019

Category	Units	Impact
Total Employment	Jobs	83,881
Personal Income	\$ millions	\$6,359.5
After tax personal Income	\$ millions	\$5,721.1
Output	\$ millions	\$16,129.8
Residents	People	147,455

Putting that in perspective, Montana hospitals directly and indirectly account for about 12.1% of state employment, 13.4% of total personal income and 13.7% of population.

A larger economy also creates a larger tax base. Table 4 presents selected tax and non-tax revenues generated by Montana hospital's direct and indirect income and profits. Montana's hospitals have an impact on state and local revenues in Montana for two reasons. The first is the size of the diversity of the hospital industry ranging

from health care providers – doctors, nurses, etc. – to administration and business services. The second is the high reliance of the state of Montana health services as a source of state revenues.

Table 4. Selected state revenue impacts, 2019 in millions

<u>Category</u>	<u>Impact</u>
Intergovernmental Revenue	\$422.8
Selective Sales Tax	\$108.7
License Taxes	\$26.6
Individual Income Tax	\$183.0
Corporate Income Tax	\$20.7
Other Taxes	\$53.7
Current Charges	\$73.0
Miscellaneous General Revenue	\$59.1
Utility Revenue	\$5.8
Liquor Store Revenue	\$13.8
Insurance Trust Revenue	\$535.8
Total	\$1,502.8

With the state's hospitals ultimately accounting for more than \$183 million in additional personal income tax revenues each year, as well as \$16.1 billion in economic output, it is clear that the impact of Montana's hospital tax revenues extends far beyond those paid directly by the hospital. The tax categories in Table 4 correspond to those used by the Census of Governments. We also find that Montana would lose almost \$1.5 billion in revenues without Montana hospitals. As can be seen, the largest category of lost revenues consists of transfers from the federal government. These reflect everything from highway funding to Medicaid, and largely reflect the lower population that would exist without hospitals. Some of the revenue categories, such as individual income tax revenues, reflect taxes that are directed towards Montana General Fund expenditure. Other categories are earmarked for specific purposes.

County Economic Impacts

In this section we present the economic impact by hospital. Table A-1 at the end of this section summarizes the economic impact for each of the 44 counties for which we have data.

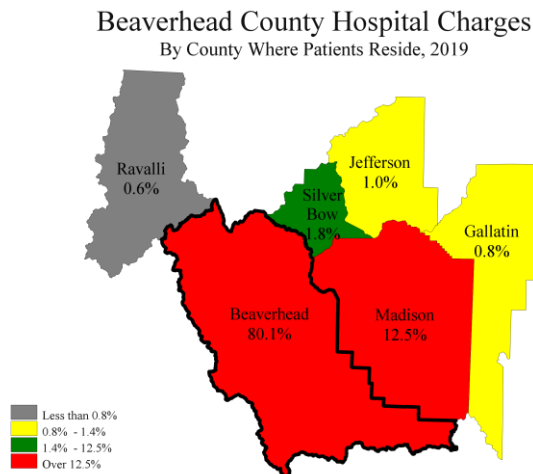
Beaverhead County

We have data for one hospital in Beaverhead County: Barrett Hospital & HealthCare. In 2019, Beaverhead County's population was 9,453 with a total personal income of \$457.8 million. Beaverhead County residents earned labor income was \$255.7 million.

Counties Served by Beaverhead County Hospitals

Figure 9 shows total percent billing by county for Barrett Hospital & HealthCare. About 80% of Barrett's billing was to Beaverhead County residents. Barrett Hospital & HealthCare also provided \$1.5 million in medical services to out-of-state patients.

Figure 9. Billing by Beaverhead County hospitals



Economic Impact

Barrett Hospital & HealthCare paid its 251 employees a total payroll of \$16.2 million, about 6.4% of total county earnings, and provided an additional \$4 million in employee benefits. Table 5 shows the total economic impact on Beaverhead County.

Table 5. Beaverhead County: Hospital economic impacts

Category	Units	Barrett Hospital & Healthcare
Total Employment	Jobs	671
Personal Income	\$ millions	\$49.8
Disposable Personal Income	\$ millions	\$44.7
Output	\$ millions	\$115.1
Population	People	1,008

Big Horn County

We have data for one hospital in Big Horn County: Big Horn Hospital Association. In 2019, Big Horn County's population was 13,319 with a total personal income of \$424.7 million. Big Horn County residents earned labor income was \$296.3 million.

Counties Served by Big Horn County Hospitals

No data is available from COMPdata Analytics for this county.

Economic Impact

Big Horn Hospital Association paid its 191 employees a total payroll of \$7.8 million, about 2.6% of total county earnings, and provided an additional \$2.4 million in employee benefits. Table 6 shows the total economic impact on Big Horn County.

Table 6. Big Horn: Hospital economic impacts

Category	Units	Big Horn Hospital Association
Total Employment	Jobs	492
Personal Income	\$ millions	\$33.8
Disposable Personal Income	\$ millions	\$30.7
Output	\$ millions	\$106.3
Population	People	922

Broadwater County

We have data for one hospital in Broadwater County: Billings Clinic Broadwater. In 2019, Broadwater County's population was 6,237 with a total personal income of \$280 million. Carbon County residents earned labor income was \$104.9 million.

Counties Served by Broadwater County Hospitals

No data is available from the COMPdata Analytics for this county.

Economic Impact

Billings Clinic Broadwater paid its 59 employees a total payroll of \$3.2 million, about 3.1% of total county earnings, and provided an additional \$560,000 in employee benefits. Table 7 shows the total economic impact on Carbon County.

Table 7. Broadwater County: Hospital economic impacts

Category	Units	Billings Clinic Broadwater
Jobs	Jobs	190
Personal Income, millions	\$ millions	\$12.5
Disposable Personal Income, millions	\$ millions	\$11.2
Output, millions	\$ millions	\$33.0
Population	People	285

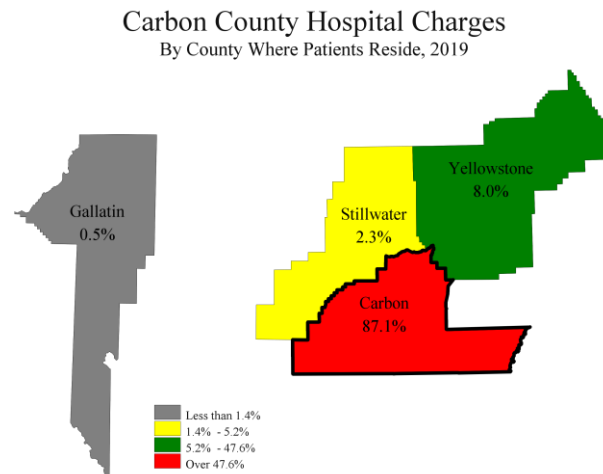
Carbon County

We have data for one hospital in Carbon County: Beartooth Billings Clinic. In 2019, Carbon County's population was 10,725 with a total personal income of \$561.7 million. Carbon County residents earned labor income was \$195.9 million.

Counties Served by Carbon County Hospitals

Figure 10 shows total percent billing by county for Beartooth Billings Clinic. Beartooth Billings Clinic billed about 87% to Carbon County residents followed by residents of Yellowstone County at 8% and provided \$821,000 in medical services to out-of-state patients.

Figure 10. Billing by Carbon County hospitals



Economic Impact

Billings Clinic paid its 142 employees a total payroll of \$5.6 million, about 2.9% of total county earnings, and provided an additional \$1.7 million in employee benefits. Table 8 shows the total economic impact on Carbon County.

Table 8. Carbon County: Hospital economic impacts

Category	Units	Beartooth Billings Clinic
Total Employment	Jobs	364
Personal Income	\$ millions	\$24.9
Disposable Personal Income	\$ millions	\$22.6
Output	\$ millions	\$78.8
Population	People	684

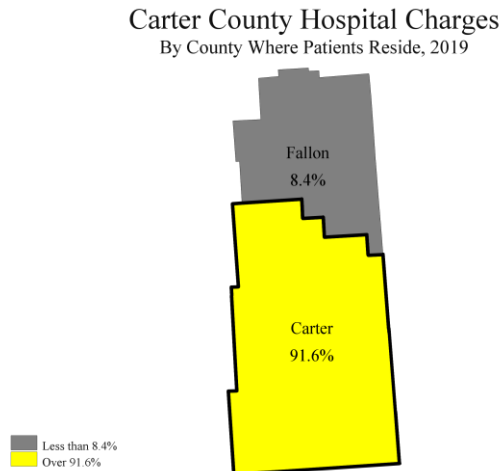
Carter County

We have data for one hospital in Carter County: Dahl Memorial Healthcare. In 2019, Carter County's population was 1,152 with a total personal income of \$52.1 million. Carter County residents earned labor income was \$22.7 million.

Counties Served by Carter County Hospitals

Figure 11 shows total percent billing by county for Dahl Memorial Healthcare. In-county billing accounted for 92% and Dahl Memorial Healthcare provided \$56,600 in medical services to out-of-state patients.

Figure 11. Billing by Carter County hospitals



Economic Impact

We have data on total hospital payroll which allows us to conduct the impact analysis but not have the employment nor the components of payroll. Dahl Memorial Healthcare's total payroll was \$2.1million, about 9.1% of total county earnings. Table 9 shows the total economic impact of Dahl Memorial Healthcare.

Table 9. Carter County: Hospital economic impacts

Category	Units	Dahl Memorial Healthcare
Total Employment	Jobs	94
Personal Income	\$ millions	\$6.1
Disposable Personal Income	\$ millions	\$5.3
Output	\$ millions	\$18.0
Population	People	137

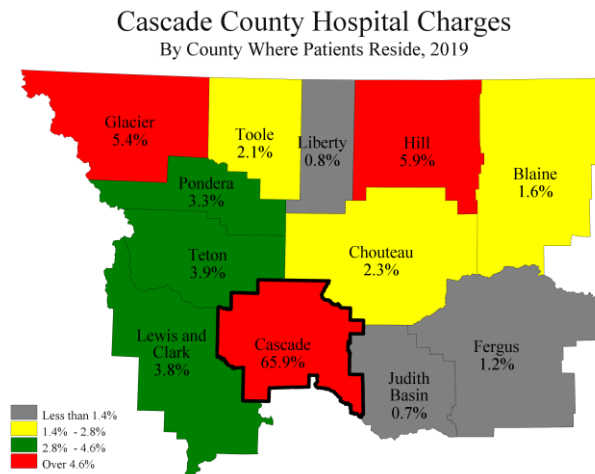
Cascade County

We have data for two hospitals in Cascade County: Benefis Health System and Great Falls Clinic Hospital. In 2019, Cascade County's population was 81,366 with a total personal income of \$4,052.3 million. Cascade residents earned labor income was \$2,597.6 million.

Counties Served by Cascade County Hospitals

Figure 12 shows total percent billing by county for Cascade County-based hospitals. In-county billing accounted for 66%, followed by Hill (6%), Glacier (5%), and Teton (4%) and county hospitals provided \$8 million in medical services to out-of-state patients.

Figure 12. Billing by Cascade County hospitals



Economic Impact

Benefis Health System paid its 3,278 employees a total payroll of \$212 million, about 8.2% of total county earnings, and provided an additional \$46.6 million in employee benefits. Great Falls Clinic Hospital paid its 450 employees a total payroll of \$18.5 million, about 0.7% of total county earnings, and provided an additional \$2.9 million in employee benefits. Table 10 shows the total economic impact on Cascade County.

Table 10. Cascade County: Hospital economic impacts

Category	Units	Benefis	Great Falls Clinic	Total
Total Employment	Jobs	9,135	1,218	10,353
Personal Income	\$ millions	\$685.8	\$85.5	\$771.3
Disposable Personal Income	\$ millions	\$617.5	\$77.1	\$694.6
Output	\$ millions	\$1,827.3	\$244.8	\$2,072.1
Population	People	16,367	2,181	18,548

Chouteau County

We have data for two hospitals in Chouteau County: Missouri River Medical Center and Big Sandy Medical Center. In 2019, Chouteau County's population was 5,635 with a total personal income of \$232.8 million. Chouteau County residents earned labor income was \$103.8 million.

Counties Served by Chouteau County Hospitals

No data is available from the COMPdata Analytics for this county.

Economic Impact

Missouri River Medical Center paid its 69 employees a total payroll of \$2.8 million, about 2.7% of total county earnings, and provided an additional \$0.8 million in employee benefits. The economic impact of Big Sandy Medical Center is also moderate. Big Sandy Medical Center paid its 52 employees a total payroll of \$1.4 million, about 1.4% of total county earnings, and provided an additional \$0.2 million in employee benefits. Table 11 shows the total economic impact on Chouteau County.

Table 11. Chouteau County: Hospital economic impacts

Category	Units	Missouri River	Big Sandy	Total
Total Employment	Jobs	188	134	322
Personal Income	\$ millions	\$13.4	\$8.5	\$21.9
Disposable Personal Income	\$ millions	\$12.1	\$7.7	\$19.8
Output	\$ millions	\$37.7	\$27.3	\$65.0
Population	People	336	246	582

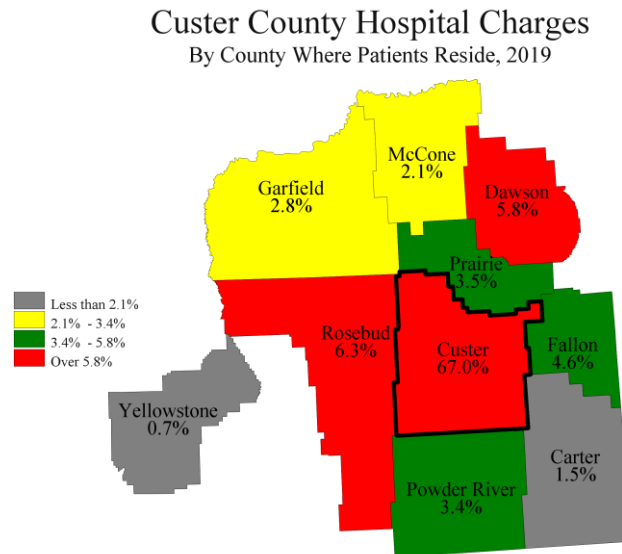
Custer County

We have data for one hospital in Custer County: Holy Rosary Healthcare. In 2019, Custer County's population was 11,402 with a total personal income of \$538.9 million. Custer County residents earned labor income was \$343.1 million.

Counties Served by Custer County Hospitals

Figure 13 shows total percent billing by county for Holy Rosary Healthcare. Holy Rosary Healthcare billed about 67% to Custer County residents and provided \$1.3 million in medical services to out-of-state patients.

Figure 13. Billing by Custer County hospitals



Economic Impact

Holy Rosary Healthcare paid its 311 employees a total payroll of \$16.0 million, about 4.7% of total county earnings, and provided an additional \$3.7 million in employee benefits. Table 12 shows the total economic impact on Custer County.

Table 12. Custer County: Hospital economic impacts

Category	Units	Holy Rosary Healthcare
Total Employment	Jobs	550
Personal Income	\$ millions	\$41.6
Disposable Personal Income	\$ millions	\$35.9
Output	\$ millions	\$104.8
Population	People	793

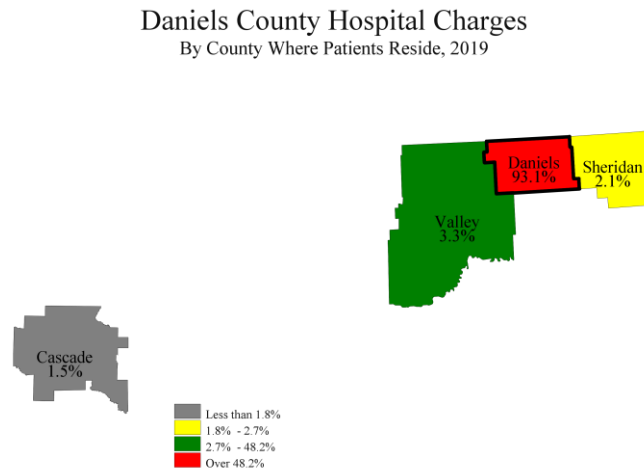
Daniels County

We have data for one hospital in Daniels County: Daniels Memorial Healthcare Center. In 2019, Daniels County's population was 1,690 with a total personal income of \$81.8 million. Daniels County residents earned labor income was \$43.3 million.

Counties Served by Daniels County Hospitals

Figure 14 shows total percent billing by county for Daniels Memorial Healthcare Center. Daniels Memorial Healthcare Center billed about 93% to Daniels County residents and provided \$18,000 in medical services to out-of-state patients.

Figure 14. Billing by Daniels County hospitals



Economic Impact

Daniels Memorial Healthcare Center paid its 109 employees a total payroll of \$3.5 million, about 8.1% of total county earnings, and provided an additional \$1.3 million in employee benefits. Table 13 shows the total economic impact on Daniels County.

Table 13. Daniels County: Hospital economic impacts

Category	Units	Daniels Memorial Healthcare Center
Total Employment	Jobs	187
Personal Income	\$ millions	\$12.3
Disposable Personal Income	\$ millions	\$10.7
Output	\$ millions	\$35.8
Population	People	272

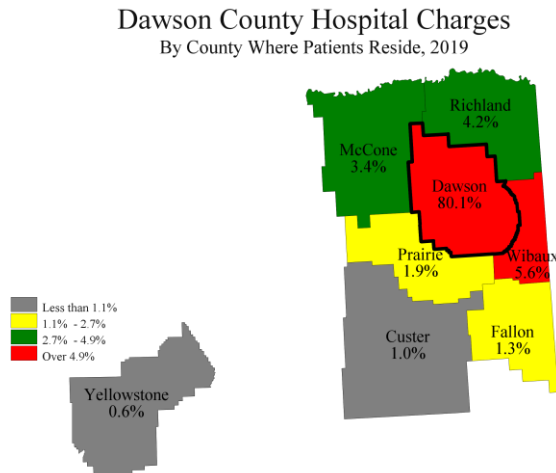
Dawson County

We have data for one hospital in Dawson County: Glendive Medical Center. In 2019, Dawson County's population was 8,600 with a total personal income of \$407 million. Dawson County residents earned labor income was \$244 million.

Counties Served by Dawson County Hospitals

Figure 15 shows total percent billing by county for Glendive Medical Center. Glendive Medical Center billed about 80% to Dawson County residents and provided \$1.4 million in medical services to out-of-state patients.

Figure 15. Billing by Dawson County hospitals



Economic Impact

No operational data from the AHA Annual Survey dataset was available for Glendive Medical Center.

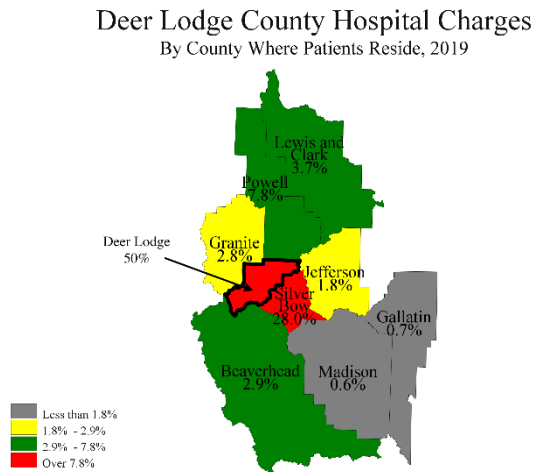
Deer Lodge County

We have data for one hospital in Deer Lodge County: Community Hospital of Anaconda. In 2019, Deer Lodge County's population was 9,140 with a total personal income of \$378.9 million. Deer Lodge County residents earned labor income was \$183.8 million.

Counties Served by Deer Lodge County Hospitals

Figure 16 shows total percent billing by county for Community Hospital of Anaconda. Community Hospital of Anaconda billed about 50% to Deer Lodge County residents and provided \$744,000 in medical services to out-of-state patients.

Figure 16. Billing by Deer Lodge County hospitals



Economic Impact

Community Hospital of Anaconda paid its 402 employees a total payroll of \$31.0 million, about 16.9% of total county earnings, and provided an additional \$4.4 million in employee benefits. Table 14 shows the total economic impact on Deer Lodge County.

Table 14. Deer Lodge County: Hospital economic impacts

Category	Units	Community Hospital of Anaconda
Total Employment	Jobs	1,093
Personal Income	\$ millions	\$83.2
Disposable Personal Income	\$ millions	\$74.8
Output	\$ millions	\$187.0
Population	People	1,643

Fallon County

We have data for one hospital in Fallon County: Fallon Medical Complex. In 2019, Fallon County's population was 2,846 with a total personal income of \$144.6 million. Fallon County residents earned labor income was \$110.6 million.

Counties Served by Fallon County Hospitals

No data is available from the COMPdata Analytics for this county.

Economic Impact

Fallon Medical Complex paid its 109 employees a total payroll of \$3.6 million, about 3.3% of total county earnings, and provided an additional \$0.8 million in employee benefits. Table 15 shows the total economic impact on Fallon County.

Table 15. Fallon County: Hospital economic impacts

Category	Units	Fallon Medical Complex
Total Employment	Jobs	186
Personal Income	\$ millions	\$12.0
Disposable Personal Income	\$ millions	\$10.5
Output	\$ millions	\$35.7
Population	People	271

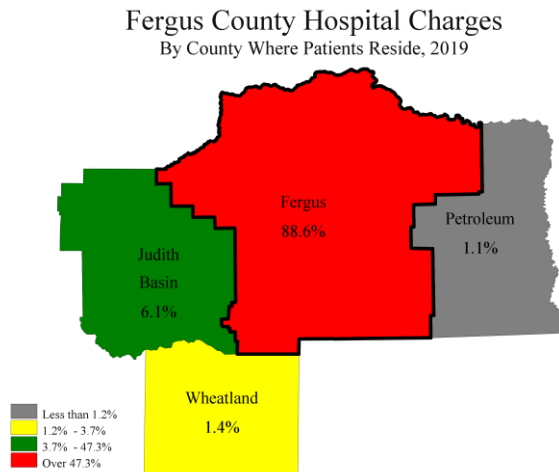
Fergus County

We have data for one hospital in Fergus County: Central Montana Medical Center. In 2019, Fergus County's population was 11,050 with a total personal income of \$515.4 million. Fergus County residents earned labor income was \$308.2 million.

Counties Served by Fergus County Hospitals

Figure 17 shows total percent billing by county for Central Montana Medical Center. Central Montana Medical Center billed about 89% to county residents and provided \$482,000 in medical services to out-of-state patients.

Figure 17. Billing by Fergus County hospitals



Economic Impact

Central Montana Medical Center paid its 365 employees a total payroll of \$17.9 million, about 5.8% of total county earnings, and provided an additional \$3.6 million in employee benefits. Table 16 shows the total economic impact on Fergus County.

Table 16. Fergus County: Hospital economic impacts

Category	Units	Central Montana Medical Center
Total Employment	Jobs	948
Personal Income	\$ millions	\$66.6
Disposable Personal Income	\$ millions	\$60.5
Output	\$ millions	\$204.4
Population	People	1,774

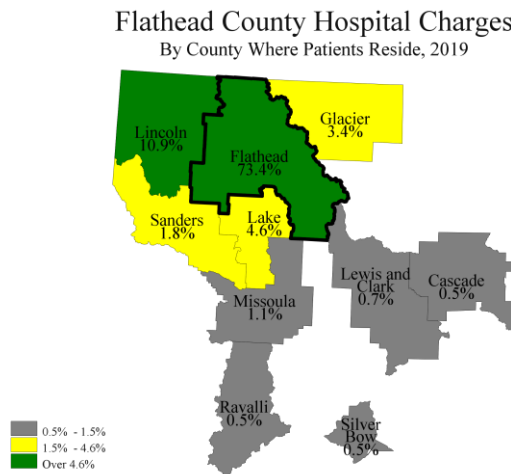
Flathead County

We have data for three hospitals in Flathead County: Logan Health (formerly Kalispell Regional Healthcare and inclusive of the medical center), North Valley Hospital, and Flathead Community Health Center. In 2019, Flathead County's population was 103,806 with a total personal income of \$5 billion. Flathead County residents earned labor income was \$3 billion.

Counties Served by Flathead County Hospitals

Figure 18 shows total percent billing by county for Flathead County hospitals. In-county billing accounted for 73.4%. The three largest recipient counties of Flathead County based care were Lincoln (11%), Lake (5%) and Glacier (3%) and county hospitals provided \$19.4 million in medical services to out-of-state patients.

Figure 18. Billing by Flathead County hospitals



Economic Impact

Logan Health paid its 3,022 employees a total payroll of \$210.6 million, about 7% of total county earnings, and provided an additional \$51.1 million in employee benefits. North Valley Hospital paid its 461 employees a total payroll of \$25.7 million, about 0.9% of total county earnings, and provided an additional \$8.9 million in employee benefits. The Flathead Community Health Center paid its 293 employees \$18.1 million provided an additional \$0.8 million in benefits. Table 17 shows the total economic impact on Flathead County.

Table 17. Flathead County: Hospital economic impacts

Category	Units	Logan Health	North Valley	Flathead Community	Total
Total Employment	Jobs	9,287	1,537	982	11,816
Personal Income	\$ millions	\$721.3	\$115.8	\$74.5	\$912.0
Disposable Personal Income	\$ millions	\$647.6	\$104.0	\$66.9	\$818.5
Output	\$ millions	\$1,666.7	\$276.9	\$176.7	\$2,120.3
Population	People	16,421	2,725	1,740	20,886

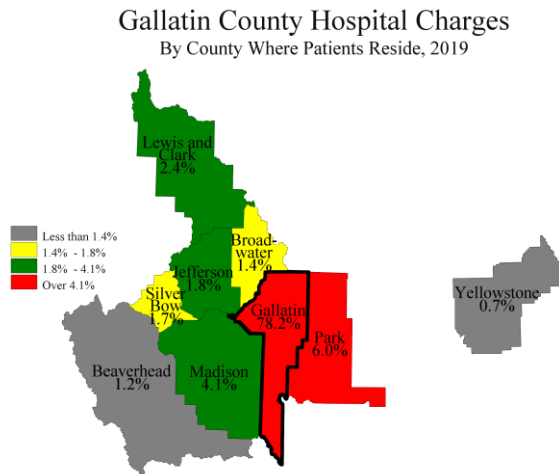
Gallatin County

We have data for two hospitals in Gallatin County: Bozeman Health and Big Sky Medical Center. In 2019, Gallatin County's population was 114,434 with a total personal income of \$6.7 billion. Gallatin County residents earned labor income was \$4.5 billion.

Counties Served by Gallatin County Hospitals

Figure 19 shows total percent billing by county for Gallatin County hospitals. In-county billing accounted for 78%. The three largest recipient counties of Gallatin County based care were Park (6%), Madison (4%) and Lewis & Clark (2%) and county hospitals provided \$19.8 million in medical services to out-of-state patients.

Figure 19. Billing by Gallatin County hospitals



Economic Impact

Bozeman Health paid its 1,650 employees a total payroll of \$77.2 million, about 1.7% of total county earnings, and provided an additional \$19.4 million in employee benefits. Big Sky Medical Center paid its 49 employees a total payroll of \$3 million, about 0.1% of total county earnings, and provided an additional \$0.7 million in employee benefits. Table 18 shows the total economic impact on Gallatin County.

Table 18. Gallatin County: Hospital economic impacts

Category	Units	Bozeman Health	Big Sky Medical Center	Total
Total Employment	Jobs	4,208	130	4,338
Personal Income	\$ millions	\$287.2	\$9.4	\$296.6
Disposable Personal Income	\$ millions	\$258.6	\$8.5	\$267.1
Output	\$ millions	\$729.2	\$22.3	\$751.5
Population	People	6,402	194	6,596

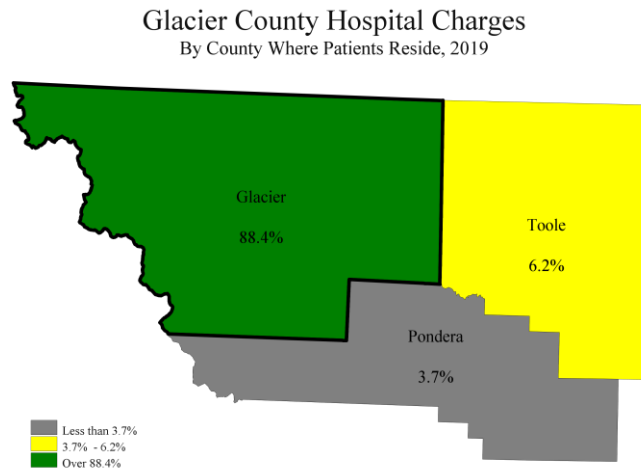
Glacier County

We have data for one hospital in Glacier County: Northern Rockies Medical Center. In 2019, Glacier County's population was 13,753 with a total personal income of \$501.8 million. Glacier County residents earned labor income was \$284.6 million.

Counties Served by Glacier County Hospitals

Figure 20 shows total percent billing by county for Northern Rockies Medical Center. Northern Rockies Medical Center billed over 88% to Glacier County residents and provided \$121,000 in medical services to out-of-state patients.

Figure 20. Billing by Glacier County hospitals



Economic Impact

Northern Rockies Medical Center paid its 64 employees a total payroll of \$5.3 million, about 1.9% of total county earnings, and provided an additional \$0.7 million in employee benefits. Table 19 shows the total economic impact on Glacier County.

Table 19. Glacier County: Hospital economic impacts

Category	Units	Northern Rockies Medical Center
Total Employment	Jobs	187
Personal Income	\$ millions	\$15.0
Disposable Personal Income	\$ millions	\$13.5
Output	\$ millions	\$36.8
Population	People	324

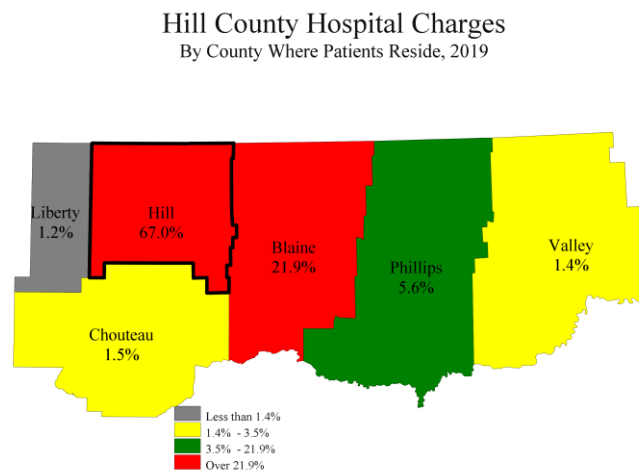
Hill County

We have data for one hospital in Hill County: Northern Montana Health Care. In 2019, Hill County's population was 16,484 with a total personal income of \$776.1 million. Hill County residents earned labor income was \$496.2 million.

Counties Served by Hill County Hospitals

Figure 21 shows total percent billing by county for Northern Montana Health Care. Northern Montana Health care billed about 67% to Hill County residents and provided \$639,000 in medical services to out-of-state patients.

Figure 21. Billing by Hill County hospitals



Economic Impact

Northern Montana Health Care paid its 612 employees a total payroll of \$32.3 million, about 6.5% of total county earnings, and provided an additional \$5.4 million in employee benefits. Table 20 shows the total economic impact on Hill County.

Table 20. Hill County: Hospital economic impacts

Category	Units	Northern Montana Health Care
Total Employment	Jobs	1,695
Personal Income	\$ millions	\$124.6
Disposable Personal Income	\$ millions	\$112.1
Output	\$ millions	\$338.7
Population	People	3,008

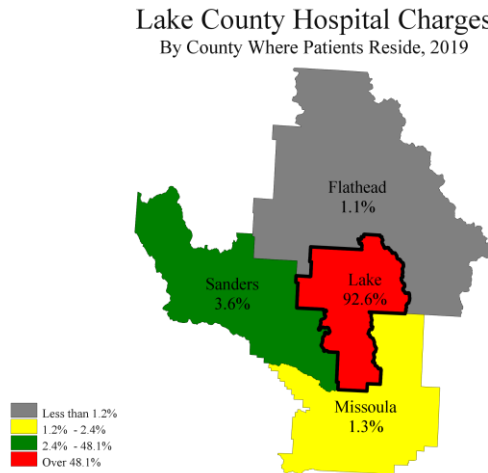
Lake County

We have data for two hospitals in Lake County: St. Luke Community Healthcare and Providence St. Joseph Medical Center. In 2019, Lake County's population was 30,458 with a total personal income of \$1.2 billion. Lake County residents earned labor income was \$533.9 million.

Counties Served by Lake County Hospitals

Figure 22 shows total percent billing by county for Lake County-based hospitals. In-county billing was almost 93% and county hospitals provided \$1.3 million in medical services to out-of-state patients.

Figure 22. Billing by Lake County hospitals



Economic Impact

St. Luke Community Healthcare paid its 413 employees a total payroll of \$22.3 million, about 4.2% of total county earnings, and provided an additional \$5.7 million in employee benefits. Providence St. Joseph Medical Center paid its 227 employees a total payroll of \$17.8 million, about 3.3% of total county earnings, and provided an additional \$1.5 million in employee benefits. Table 21 shows the total economic impact on Lake County.

Table 21. Lake County: Hospital economic impacts

Category	Units	St. Luke Community Healthcare	Providence St. Joseph Medical Center	Total
Total Employment	Jobs	1,357	772	2,129
Personal Income	\$ millions	\$100.0	\$59.7	\$159.7
Disposable Personal Income	\$ millions	\$90.0	\$53.6	\$143.6
Output	\$ millions	\$245.3	\$138.4	\$383.7
Population	People	2,411	1,364	3,775

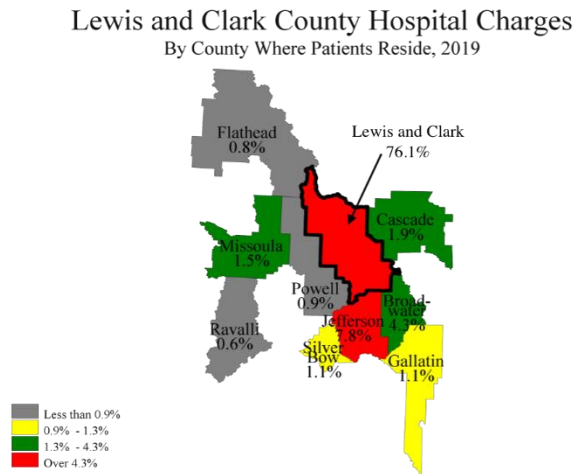
Lewis and Clark County

We have data for two hospitals in Lewis and Clark County: St. Peter's Health and Shodair Children's Hospital. In 2019, Lewis and Clark County's population was 69,432 with a total personal income of \$3.5 billion. Lewis and Clark County residents earned labor income was \$2.5 billion.

Counties Served by Lewis and Clark County Hospitals

Figure 23 shows total percent billing by county for hospitals in Lewis and Clark County. In-county billing accounted for about 76% and county hospitals provided \$4.7 million in medical services to out-of-state patients.

Figure 23. Billing by Lewis and Clark County hospitals



Economic Impact

St. Peter's Health paid its 1,531 employees a total payroll of \$89.6 million, about 3.5% of total county earnings, and provided an additional \$22.2 million in employee benefits. Shodair Children's Hospital paid its 411 employees a total payroll of \$16.9 million, about 0.7% of total county earnings, and provided an additional \$4.0 million in employee benefits. Table 22 shows the total economic impact on Lewis and Clark County.

Table 22. Lewis and Clark County: Hospital economic impacts

Category	Units	St. Peter's Health	Shodair Children's Hospital	Total
Total Employment	Jobs	4,315	1,112	5,427
Personal Income	\$ millions	\$340.9	\$80.8	\$421.7
Disposable Personal Income	\$ millions	\$306.6	\$72.9	\$379.5
Output	\$ millions	\$887.5	\$230.7	\$1,118.2
Population	People	7,632	1,991	9,623

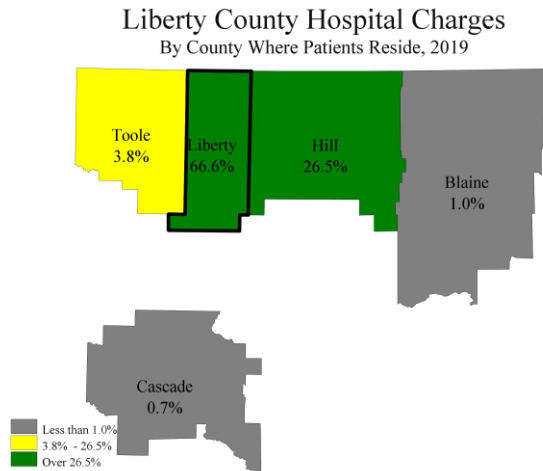
Liberty County

We have data for one hospital in Liberty County: Liberty Medical Center. In 2019, Liberty County's population was 2,337 with a total personal income of \$111.4 million. Liberty County residents earned labor income was \$65.3 million.

Counties Served by Liberty County Hospitals

Figure 24 shows total percent billing by county for Liberty Medical Center. Liberty Medical Center billed about 67% to Liberty County residents and provided \$42,000 in medical services to out-of-state patients.

Figure 24. Billing by Liberty County hospitals



Economic Impact

Liberty Medical Center paid its 92 employees a total payroll of \$2.8 million, about 4.3% of total county earnings, and provided an additional \$0.7 million in employee benefits. Table 23 shows the total economic impact on Liberty County.

Table 23. Liberty County: Hospital economic impacts

Category	Units	Liberty Medical Center
Total Employment	Jobs	245
Personal Income	\$ millions	\$16.6
Disposable Personal Income	\$ millions	\$15.0
Output	\$ millions	\$49.5
Population	People	441

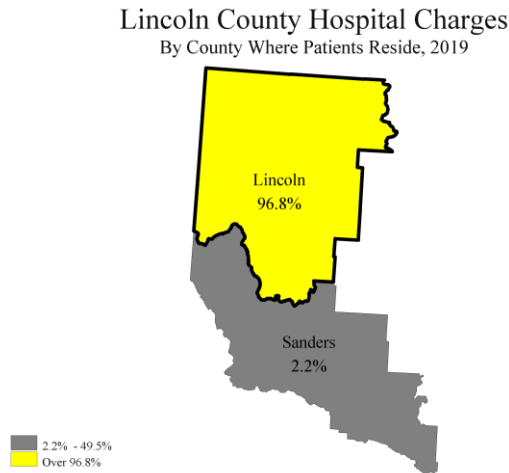
Lincoln County

We have data for one hospital in Lincoln County: Cabinet Peaks Medical Center. In 2019, Lincoln County's population was 20,000 with a total personal income of \$742 million, and earned labor income was \$327 million.

Counties Served by Lincoln County Hospitals

Figure 25 shows total percent billing by county for Cabinet Peaks Medical Center. Cabinet Peaks Medical billed about 97% to Lincoln County residents and provided \$1.2 million in medical services to out-of-state patients.

Figure 25. Billing by Lincoln County hospitals



Economic Impact

Cabinet Peaks Medical Center paid its 268 employees a total payroll is \$15 million, about 4.6% of total county earnings, and provided an additional \$3.9 million in employee benefits. Table 24 shows the total economic impact on Lincoln County.

Table 24. Lincoln County: Hospital economic impacts

Category	Units	Cabinet Peaks Medical Center
Total Employment	Jobs	862
Personal Income	\$ millions	\$61.7
Disposable Personal Income	\$ millions	\$55.6
Output	\$ millions	\$156.6
Population	People	1,542

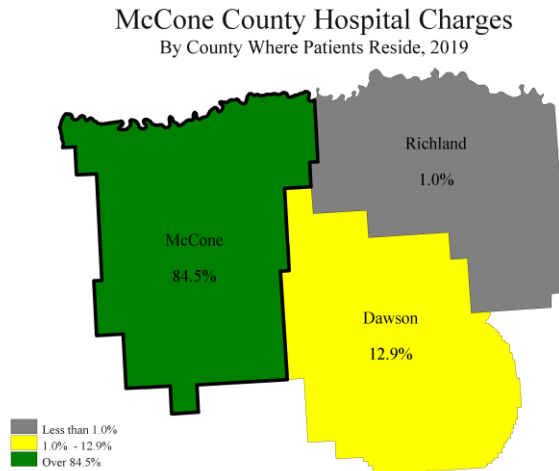
McCone County

We have data for one hospital in McCone County: McCone County Health Center. In 2019, McCone County's population was 1,164 with a total personal income of \$66.4 million, and earned labor income was \$30.9 million.

Counties Served by McCone County Hospitals

Figure 26 shows total percent billing by county for McCone County. McCone County Health Center billed about 85% to McCone County residents and provided \$12,000 in medical services to out-of-state patients.

Figure 26. Billing by McCone County hospitals



Economic Impact

McCone County Health Center paid its 47 employees a total payroll is \$1.6 million, about 5.1% of total county earnings, and provided an additional \$560,000 in employee benefits. Table 25 shows the total economic impact on McCone County.

Table 25. McCone County: Hospital economic impacts

Category	Units	McCone County Health Center
Total Employment	Jobs	81
Personal Income	\$ millions	\$5.6
Disposable Personal Income	\$ millions	\$4.8
Output	\$ millions	\$15.5
Population	People	118

Madison County

We have data for two hospitals in Madison County: Madison Valley Medical Center and Ruby Valley Medical Center. In 2019, Madison County’s population was 8,700 with a total personal income of \$460 million, and earned labor income was \$314 million.

Counties Served by Madison County Hospitals

No data is available from COMPdata Analytics for this county.

Economic Impact

Madison Valley Medical Center paid its 85 employees a total payroll of \$4.5 million, about 1.4% of total county earnings, and provided an additional 811,000 in employee benefits. Ruby Valley Medical Center paid its 91 employees a total payroll is \$4.3 million, about 1.4% of total county earnings, and provided an additional \$792,000 in employee benefits. Table 26 shows the total economic impact on Madison County.

Table 26. Madison County: Hospital economic impacts

Category	Units	Madison Valley Medical Center	Ruby Valley Medical Center	Total
Total Employment	Jobs	222	234	456
Personal Income	\$ millions	\$15.8	\$16.2	\$32.0
Disposable Personal Income	\$ millions	\$14.2	\$14.6	\$28.8
Output	\$ millions	\$38.3	\$40.4	\$78.7
Population	People	333	351	684

Meagher County

We have data for one hospital in Meagher County: Mountainview Medical Center. In 2019, Meagher County's population was 1,862 with a total personal income of \$86.5 million, and earned labor income was \$38.3 million.

Counties Served Mountainview Medical Center

No data is available from the COMPdata Analytics for this county.

Economic Impact

Mountainview total payroll was \$3.7 million, about 9.7% of total county earnings, and provided an additional \$498,000 in employee benefits. Table 27 shows the total economic impact on Meagher County.

Table 27. Meagher County: Hospital economic impacts

Category	Units	Mountainview Medical Center
Total Employment	Jobs	176
Personal Income	\$ millions	\$12.3
Disposable Personal Income	\$ millions	\$11.1
Output	\$ millions	\$30.3
Population	People	263

Mineral County

We have data for one hospital in Mineral County: Mineral Community Hospital. In 2019, Mineral County's population was 4,397 with a total personal income of \$178.3 million, and Mineral earned labor income was \$66.1 million.

Counties Served by Mineral County Hospitals

No data is available from the COMPdata Analytics for this county.

Economic Impact

Mineral Community Hospital paid its 90 employees a total payroll of \$3.4 million, about 5.1% of total county earnings, and provided an additional \$714,000 in employee benefits. Table 28 shows the total economic impact on Mineral County.

Table 28. Mineral County: Hospital economic impacts

Category	Units	Mineral Community Hospital
Total Employment	Jobs	283
Personal Income	\$ millions	\$19.5
Disposable Personal Income	\$ millions	\$17.6
Output	\$ millions	\$51.7
Population	People	506

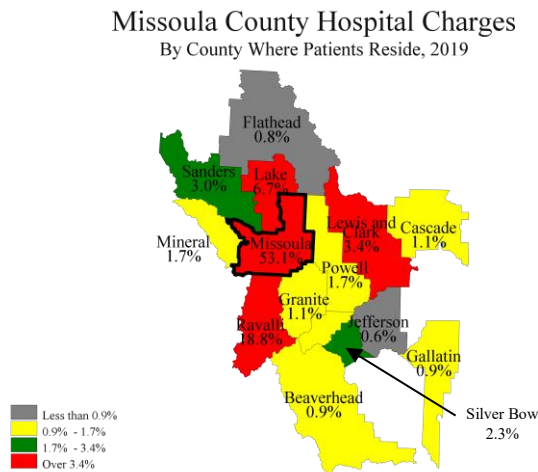
Missoula County

We have data for two hospitals in Missoula County: Providence St. Patrick Hospital and Community Medical Center. In 2019, Missoula County's population was 119,600 with a total personal income of \$6.1 billion, and earned labor income was \$4.2 billion.

Counties Served by Missoula County Hospitals

Figure 27 shows total percent billing by county for Missoula County based hospitals. In-county billing was about 53% of the total. Outside of Missoula, the three largest recipient counties of Missoula County based care were Ravalli (19%), Lake (7%) and Lewis and Clark (3%) and county hospitals provided \$31 million worth of services to out-of-state patients.

Figure 27. Billing by Missoula County hospitals



Economic Impact

Providence St. Patrick Hospital paid its 1,656 employees a total payroll of \$81.1 million, about 1.9% of total county earnings, and provided an additional \$8.3 million in employee benefits. Community Medical Center paid its 1,216 employees a total payroll of \$64.6 million, about 1.5% of total county earnings, and provided an additional \$14.3 million in employee benefits. Table 29 shows the total economic impact on Missoula County.

Table 29. Missoula County: Hospital economic impacts

Category	Units	Providence St. Patrick Hospital	Community Medical Center	Total
Total Employment	Jobs	5,282	3,863	9,145
Personal Income	\$ millions	\$373.2	\$272.0	\$645.2
Disposable Personal Income	\$ millions	\$336.2	\$245.1	\$581.3
Output	\$ millions	\$962.0	\$704.1	\$1,666.1
Population	People	9,437	6,931	16,368

Musselshell County

We have data for one hospital in Musselshell County: Roundup Memorial Healthcare. In 2019, Musselshell County's population was 4,633 with a total personal income of \$212.6 million, and earned labor income was \$96.5 million.

Counties Served by Musselshell County Hospitals

No data is available from the COMPdata Analytics for this county.

Economic Impact

Roundup Memorial Healthcare paid its 119 employees a total payroll of \$3.4 million, about 3.5% of total county earnings, and provided an additional \$792,000 in employee benefits. Table 30 shows the total economic impact on Musselshell County.

Table 30. Musselshell County: Hospital economic impacts

Category	Units	Roundup Memorial Healthcare
Total Employment	Jobs	303
Personal Income	\$ millions	\$20.1
Disposable Personal Income	\$ millions	\$18.3
Output	\$ millions	\$65.6
Population	People	569

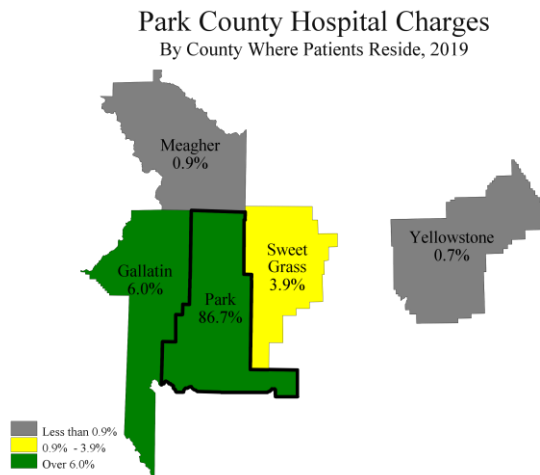
Park County

We have data for one hospital in Park County: Livingston HealthCare. In 2019, Park County's population was 16,606 with a total personal income of \$855 million, and earned labor income was \$395 million.

Counties Served by Park County Hospitals

Figure 28 shows total percent billing by county for Park County based hospitals. Livingston HealthCare billed about 87% to Park County residents and provided \$3.0 million in medical services to out-of-state patients.

Figure 28. Billing by Park County hospitals



Economic Impact

Livingston HealthCare paid its 391 employees a total payroll is \$23.1 million, about 5.8% of total county earnings, and provided an additional \$4.9 million in employee benefits. Table 31 shows the total economic impact on Park County.

Table 31. Park County: Hospital economic impacts

Category	Units	Livingston Health care
Total Employment	Jobs	1,045
Personal Income	\$ millions	\$77.4
Disposable Personal Income	\$ millions	\$69.5
Output	\$ millions	\$179.4
Population	People	1,569

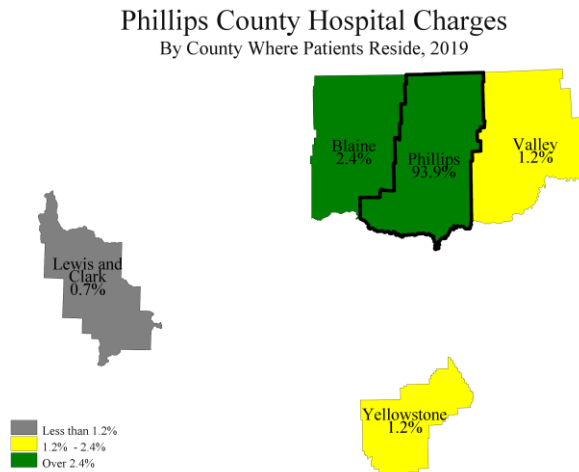
Phillips County

We have data for one hospital in Phillips County: Phillips County Hospital. In 2019, Phillips County's population was 3,954 with a total personal income of \$166.2 million, and earned labor income was \$77.7 million.

Counties Served by Phillips County Hospitals

Figure 29 shows total percent billing by county for Phillips County based hospitals. Phillips County Hospital billed about 94% to Phillips County residents and provided \$5,640 in medical services to out-of-state patients.

Figure 29. Billing by Phillips County hospitals



Economic Impact

The total payroll for Phillips County Hospital 72 employees was \$3.4 million, about 4.4% of total county earnings, and provided an additional \$867,000 in employee benefits. Table 32 shows the total economic impact on Powell County.

Table 32. Phillips County: Hospital economic impacts

Category	Units	Phillips County Hospital
Total Employment	Jobs	127
Personal Income	\$ millions	\$9.4
Disposable Personal Income	\$ millions	\$8.1
Output	\$ millions	\$24.1
Population	People	182

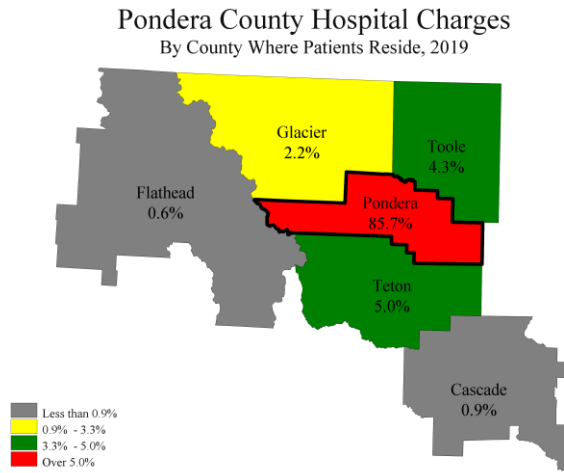
Pondera County

We have data for one hospital in Pondera County: Pondera Medical Center. In 2019, Pondera County's population was 5,900 with a total personal income of \$280.6 million, and earned labor income was \$133.3 million.

Counties Served by Pondera County Hospitals

Figure 30 shows total percent billing by county for Pondera Medical Center. Pondera Medical Center billed about 86% to Pondera County residents and provided \$93,000 in medical services to out-of-state patients.

Figure 30. Billing by Pondera County hospitals



Economic Impact

We have data on total hospital payroll which allows us to conduct the impact analysis but not have the employment nor the components of payroll. Pondera Medical Center's total payroll was \$7.0 million, about 5.3% of of total county earnings. Table 33 shows the total economic impact on Pondera County.

Table 33. Pondera County: Hospital economic impacts

Category	Units	Pondera Medical Center
Total Employment	Jobs	536
Personal Income	\$ millions	\$35.9
Disposable Personal Income	\$ millions	\$32.4
Output	\$ millions	\$108.2
Population	People	967

Powell County

We have data for one hospital in Powell County: Deer Lodge Medical Center. In 2019, Powell County's population was 6,890 with a total personal income of \$304 million, and earned income was \$162.8 million.

Counties Served by Powell County Hospitals

No data is available from the COMPdata Analytics for this county.

Economic Impact

The total payroll for Deer Lodge Medical Center's 135 employees was \$6.7 million, about 4.1% of county earnings and provided an additional \$1.3 million in employee benefits. Table 34 shows the total economic impact on Powell County.

Table 34. Powell County: Hospital economic impacts

Category	Units	Deer Lodge Medical Center
Total Employment	Jobs	425
Personal Income	\$ millions	\$29.4
Disposable Personal Income	\$ millions	\$26.6
Output	\$ millions	\$77.6
Population	People	763

Prairie County

We have data for one hospital in Prairie County: Prairie Community Hospital. In 2019, Prairie County's population was 1,100 with a total personal income of \$53.5 million and earned labor income was \$38.5 million.

Counties Served by Prairie County Hospitals

No data is available from the COMPdata Analytics for this county.

Economic Impact

The total payroll for Prairie Community Hospital's 47 employees was \$1.6 million, about 6.8% of total county earnings, and provided an additional \$368,000 in employee benefits. Table 35 shows the total economic impact on Prairie County.

Table 35. Prairie County: Hospital economic impacts

Category	Units	Prairie Community Hospital
Total Employment	Jobs	81
Personal Income	\$ millions	\$5.4
Disposable Personal Income	\$ millions	\$4.7
Output	\$ millions	\$15.5
Population	People	117

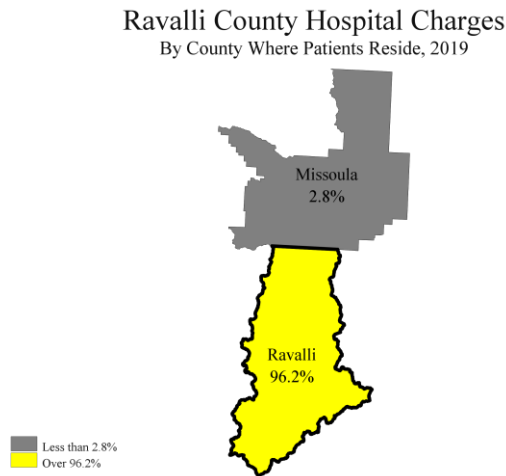
Ravalli County

We have data for one hospital in Ravalli County: Marcus Daly Memorial Hospital. In 2019, Ravalli County's population was 44,000 with a total personal income of over \$2 billion, and earned labor income was \$775 million.

Counties Served by Ravalli County Hospitals

Figure 31 shows total percent billing by county for Marcus Daly Memorial Hospital. Marcus Daly Memorial Hospital billed about 96% to Ravalli County residents and provided \$2.9 million in medical services to out-of-state patients.

Figure 31. Billing by Ravalli County hospitals



Economic Impact

The total payroll for Marcus Daly Memorial Hospital's 574 employees was \$38.2 million, about 4.9% of total county earnings, and provided an additional \$8.6 million in employee benefits. Table 36 shows the total economic impact on Ravalli County.

Table 36. Ravalli County: Hospital economic impacts

Category	Units	Marcus Daly Memorial Hospital
Total Employment	Jobs	1,845
Personal Income	\$ millions	\$140.0
Disposable Personal Income	\$ millions	\$125.8
Output	\$ millions	\$331.8
Population	People	3,267

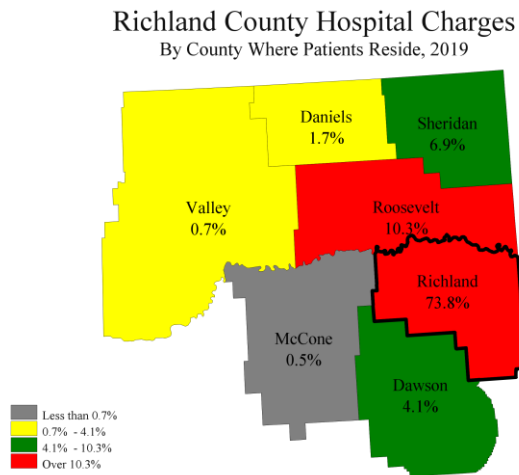
Richland County

We have data for one hospital in Richland County: Sidney Health Center. In 2019, Richland County's population was 10,800 with a total personal income of over \$696.6 million, and earned labor income was \$479.9 million.

Counties Served by Sidney Hospitals

Figure 32 shows total percent billing by county for Sidney Health Center. Sidney Health Center billed about 74% to Richland County residents and provided \$7 million worth of services to out-of-state patients.

Figure 32. Billing by Richland County hospitals



Economic Impact

The total payroll for Sidney Health Center's 466 employees was \$27.1 million, about 5.7% of total county earnings, and provided an additional \$6.2 million in employee benefits. Table 37 shows the total economic impact on Richland County.

Table 37. Richland County: Hospital economic impacts

Category	Units	Sidney Health Center
Total Employment	Jobs	835
Personal Income	\$ millions	\$65.8
Disposable Personal Income	\$ millions	\$56.7
Output	\$ millions	\$158.5
Population	People	1,199

Roosevelt County

We have data for three hospitals in Roosevelt County: Northeast Montana Health Services, Poplar Community Hospital and Roosevelt Medical Center. In 2019, Roosevelt County's population was 11,000 with a total personal income of \$396.8 million, and earned labor income was \$216.3 million.

Counties Served by Roosevelt County Hospitals

Figure 33 shows total percent billing by county for Roosevelt County based hospitals. The three hospitals billed about 94% to Roosevelt County residents and provided \$20,000 worth of services to out-of-state patients.

Figure 33. Billing by Roosevelt County hospitals

Roosevelt County Hospital Charges
By County Where Patients Reside, 2019



Economic Impact

The total payroll for Northeast Montana Health Services' 224 employees was \$8.9 million, about 4.2% of total county earnings, and provided an additional \$1.7 million in employee benefits. The total payroll for Poplar Community Hospital's 102 employees was \$3.7 million, about 1.7% of total county earnings, and provided an additional \$0.6 million in employee benefits. The total payroll for Roosevelt Medical Center's 58 employees was \$3.1 million, about 1.4% of total county earnings, and provided an additional \$450,000 in employee benefits. The total economic impact is presented in Table 38.

Table 38. Roosevelt County: Hospital economic impacts

Category	Units	Northeast Montana Health Services	Poplar Community Hospital	Roosevelt Medical Center	Total
Total Employment	Jobs	388	175	102	665
Personal Income	\$ millions	\$26.9	\$11.8	\$7.7	\$46.4
Disposable Personal Income	\$ millions	\$23.4	\$10.2	\$6.6	\$40.2
Output	\$ millions	\$74.3	\$33.6	\$19.5	\$127.4
Population	People	564	255	147	966

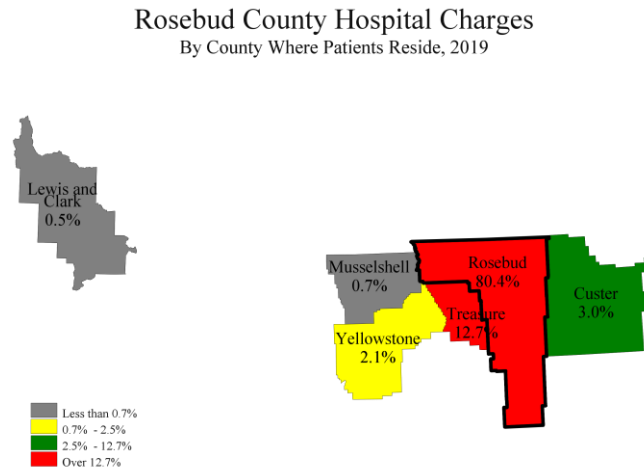
Rosebud County

We have data for one hospital in Rosebud County: Rosebud Health Care Center. In 2019, Rosebud County's population was 8,937 with a total personal income of \$397 million, and earned labor income was \$438.2 million.

Counties Served by Rosebud Hospitals

Figure 34 shows total percent billing by county for Rosebud Health Care Center. Rosebud Health Care Center billed about 80% to Rosebud County residents and provided \$40,000 worth of services to out-of-state patients.

Figure 34. Billing by Rosebud County hospitals



Economic Impact

We have data on total hospital payroll which allows us to conduct the impact analysis but not have the employment nor the components of payroll. Rosebud Health Care Center's total payroll was \$5.4 million, about 1.8% of total county earnings. Table 39 shows the total economic impact on Rosebud County.

Table 39. Rosebud County: Hospital economic impacts

Category	Units	Rosebud Health Care Center
Total Employment	Jobs	215
Personal Income	\$ millions	\$14.5
Disposable Personal Income	\$ millions	\$12.6
Output	\$ millions	\$41.2
Population	People	313

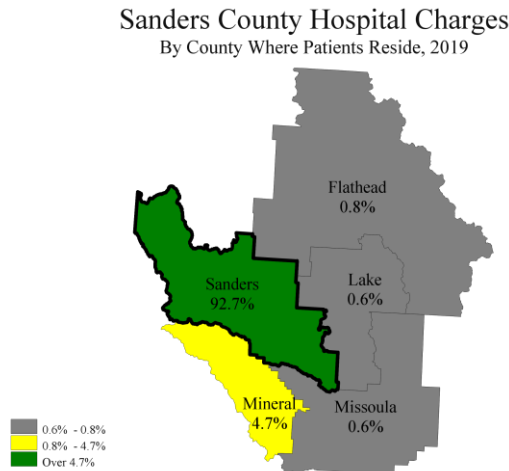
Sanders County

We have data for one hospital in Sanders County: Clark Fork Valley Hospital. In 2019, Sanders County's population was 12,000 with a total personal income of \$439.7 million, and earned labor income was \$185.4 million.

Counties Served by Sanders County Hospitals

Figure 35 shows total percent billing by county for Clark Fork Valley Hospital. Clark Fork Valley Hospital billed about 93% to Sanders County residents and provided \$624,000 worth of services to out-of-state patients.

Figure 35. Billing for Sanders County hospitals



Economic Impact

The total payroll for Clark Fork Valley Hospital's 242 employees was \$10.5 million, about 5.6% of total county earnings, and provided an additional \$3.5 million in employee benefits. Table 40 shows the total economic impact on Sanders County.

Table 40. Sanders County: Hospital economic impacts

Category	Units	Clark Fork Valley Hospital
Total Employment	Jobs	758
Personal Income	\$ millions	\$52.1
Disposable Personal Income	\$ millions	\$47.0
Output	\$ millions	\$138.6
Population	People	1,363

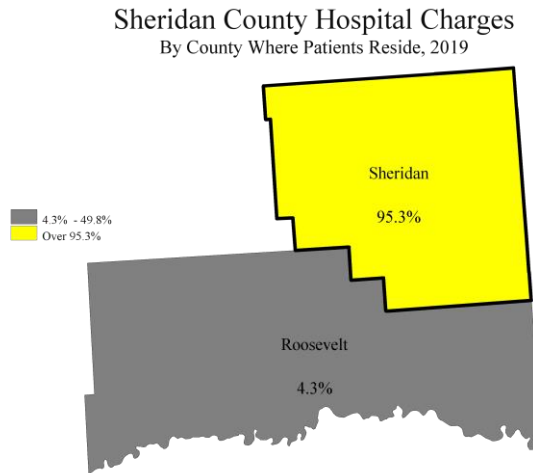
Sheridan County

We have data for one hospital in Sheridan County: Sheridan Memorial Hospital. In 2019, Sheridan County's population was 3,309 with a total personal income of \$439.7 million, and earned labor income was \$185.4 million.

Counties Served by Sheridan County Hospitals

Figure 36 shows total percent billing by county for Sheridan Memorial Hospital. Sheridan Memorial Hospital billed about 95% to Sheridan County residents and provided \$16,500 worth of services to out-of-state patients.

Figure 36. Billing by Sheridan County hospitals



Economic Impact

No operational data from the AHA Annual Survey dataset was available for Sheridan Memorial Hospital.

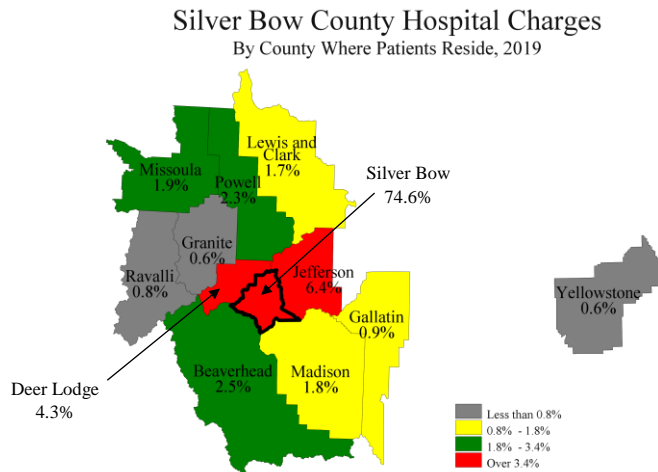
Silver Bow County

We have data for one hospital in Silver Bow County: SCL Heath – St. James Healthcare. In 2019, Silver Bow County’s population was 34,915 with a total personal income of \$1.7 billion, and earned labor income was \$1.2 billion.

Counties Served by Silver Bow County Hospitals

Figure 37 shows total percent billing by county for SCL Heath – St. James Healthcare. SCL Heath – St. James Healthcare billed about 75% to Silver Bow County residents and provided \$6.6 million worth of services to out-of-state patients.

Figure 37. Billing by Silver Bow County hospitals



Economic Impact

The total payroll for SCL Heath – St. James Healthcare’s 499 employees was \$37.5 million, about 3.2% of total county earnings, and provided an additional \$8.7 million in employee benefits. Table 41 shows the total economic impact on Silver Bow County.

Table 41. Silver Bow County: Hospital economic impacts

Category	Units	SCL Heath – St. James Healthcare
Total Employment	Jobs	1,394
Personal Income	\$ millions	\$110.7
Disposable Personal Income	\$ millions	\$99.3
Output	\$ millions	\$237.6
Population	People	2,090

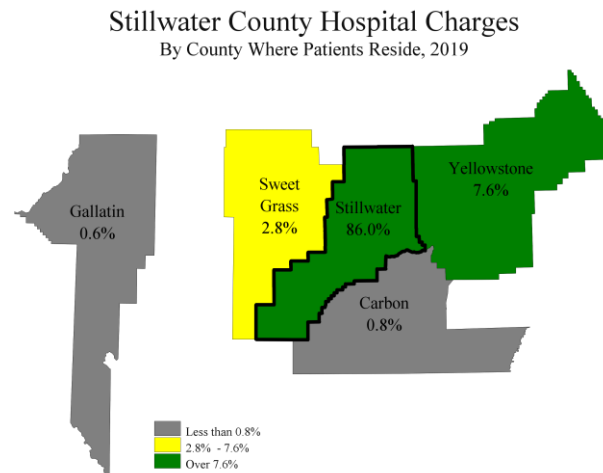
Stillwater County

We have data for one hospital in Stillwater County: Stillwater Billings Clinic. In 2019, Stillwater County's population was 9,600 with a total personal income of \$520 million, and earned labor income was \$329.4 million.

Counties Served by Stillwater County Hospitals

Figure 38 shows total percent billing by county for Stillwater Billings Clinic. Stillwater Billings Clinic billed about 86% to Stillwater County residents and provided \$505,000 worth of services to out-of-state patients.

Figure 38. Billing by Stillwater County hospitals



Economic Impact

The total payroll for Stillwater Billings Clinic's 94 employees was \$5.6 million, about 1.7% of total county earnings, and provided an additional \$1.3 million in employee benefits. Table 42 shows the total economic impact on Stillwater County.

Table 42. Stillwater County: Hospital economic impacts

Category	Units	Stillwater Billings Clinic
Total Employment	Jobs	256
Personal Income	\$ millions	\$20.4
Disposable Personal Income	\$ millions	\$18.4
Output	\$ millions	\$56.1
Population	People	471

Sweet Grass County

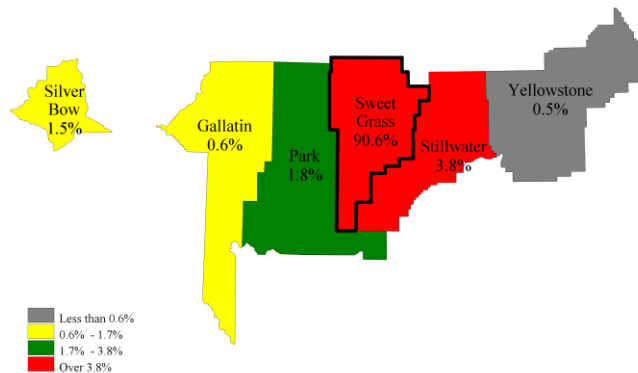
We have partial data for one hospital in Sweet Grass County: Pioneer Medical Center. In 2019, Sweet Grass County's population was 3,700 with a total personal income of \$182.0 million, and earned labor income was \$118.0 million.

Counties Served by Sweet Grass County hospitals

Figure 39 shows total percent billing by county for Pioneer Medical. Pioneer Medical billed about 91% to Sweet Grass County residents and provided \$18,000 worth of services to out-of-state patients.

Figure 39. Billing by Sweet Grass County hospitals

Sweet Grass County Hospital Charges
By County Where Patients Reside, 2019



Economic Impact

We have data on total hospital payroll which allows us to conduct the impact analysis but not have the employment nor the components of payroll. Pioneer Medical Center's total payroll was \$3.7 million, about 3.1% of total county earnings. Table 43 shows the total direct and indirect economic impact of Pioneer Medical Center on Sweet Grass County.

Table 43. Sweet Grass County: Hospital economic impact

Category	Units	Pioneer Medical Center
Total Employment	Jobs	169
Personal Income	\$ millions	\$12.3
Disposable Personal Income	\$ millions	\$11.2
Output	\$ millions	\$36.3
Population	People	314

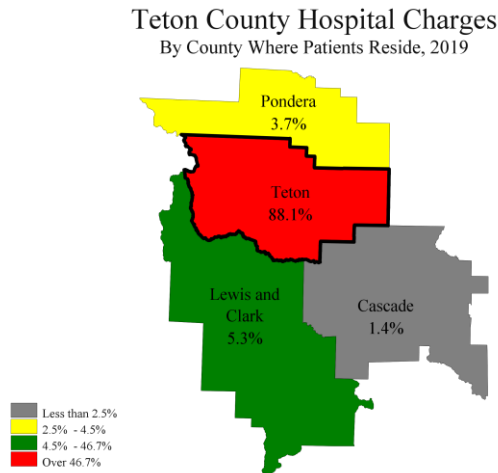
Teton County

We have data for one hospital in Teton County: Benefis Teton Medical Center. In 2019, Teton County's population was 9,600 with a total personal income of \$520.0 million. Teton earned labor income was \$329.4 million.

Counties Served by Teton County Hospitals

Figure 40 shows total percent billing by county for Benefis Teton Medical Center. Benefis Teton Medical Center billed about 81% to Teton County residents and provided \$18,000 worth of services to out-of-state patients.

Figure 40. Billing by Teton County hospitals



Economic Impact

The total payroll for Benefis Teton Medical Center's 72 employees was \$3.1 million, about 2.1% of total county earnings, and provided an additional \$714,000 in employee benefits. Table 44 shows the total economic impact on Teton County.

Table 44. Teton County: Hospital economic impacts

Category	Units	Benefis Teton Medical Center
Total Employment	Jobs	215
Personal Income	\$ millions	\$15.7
Disposable Personal Income	\$ millions	\$14.2
Output	\$ millions	\$44.5
Population	People	383

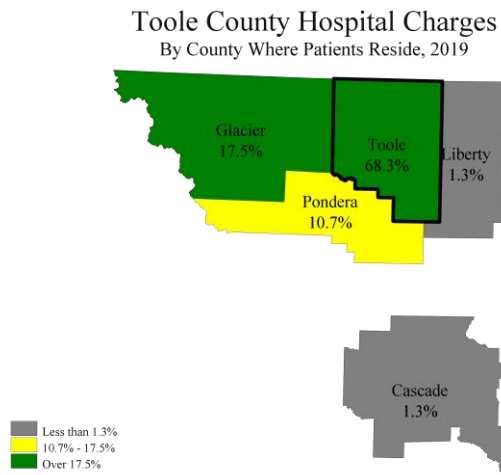
Toole County

We have data for one hospital in Toole County: Marias Medical Center. In 2019, Toole County's population was 4,736 with a total personal income of \$266.2 million. Toole County earned labor income was \$196.1 million.

Counties Served by Toole County Hospitals

Figure 41 shows total percent billing by county for Toole County. Marias Medical Center billed about 68% to Toole County residents and provided \$234,000 worth of services to out-of-state patients.

Figure 41. Billing by Toole County hospitals



Economic Impact

The total payroll for Marias Medical Center's 106 employees was \$3.9 million, about 2% of total county earnings, and provided an additional \$1.2 million in employee benefits. Table 45 shows the total economic impact on Toole County.

Table 45. Toole County: Hospital economic impacts

Category	Units	Marias Medical Center
Total Employment	Jobs	287
Personal Income	\$ millions	\$20.2
Disposable Personal Income	\$ millions	\$18.2
Output	\$ millions	\$57.7
Population	People	513

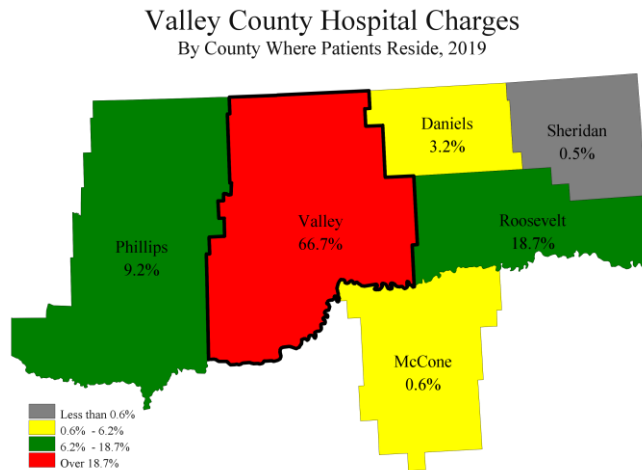
Valley County

We have data for one hospital in Valley County: Frances Mahon Deaconess Hospital. In 2019, Valley County's population was 7,396 with a total personal income of \$266.1 million, earned labor income was \$196.1 million.

Counties Served by Valley County Hospitals

Figure 42 shows total percent billing by county for Valley County by Frances Mahon Deaconess Hospital. Frances Mahon Deaconess Hospital billed about 67% to Valley County residents and provided \$234,000 worth of services to out-of-state patients.

Figure 42. Counties served by Valley County hospitals



Economic Impact

The total payroll for Frances Mahon Deaconess Hospital's 208 employees was \$12.8 million, about 6.3% of total county earnings, and provided an additional \$2.9 million in employee benefits. Table 46 shows the total economic impact on Valley County.

Table 46. Valley County: Hospital economic impacts

Category	Units	Frances Mahon Deaconess Hospital
Total Employment	Jobs	374
Personal Income	\$ millions	\$30.1
Disposable Personal Income	\$ millions	\$25.9
Output	\$ millions	\$70.9
Population	People	535

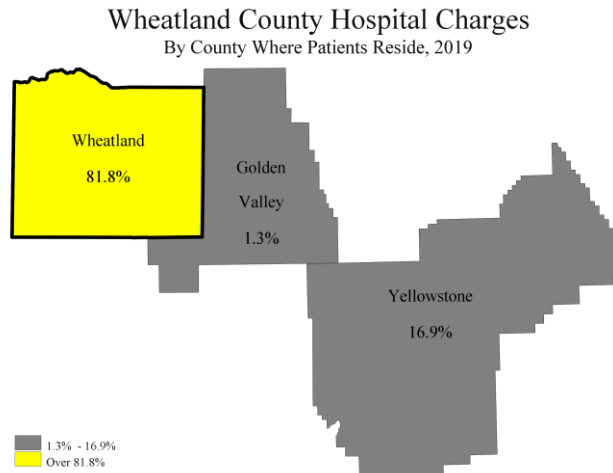
Wheatland County

We have partial data for one hospital in Wheatland County: Wheatland Memorial Healthcare. In 2019 Wheatland County's population was 2,126 with a total personal income of \$85.1 million, earned labor income was \$43.8 million.

Counties Served by Wheatland County Hospitals

Figure 43 shows total percent billing by county for Wheatland County based hospitals. In-county billing was 82% of total in-state billing.

Figure 43. Billing by Wheatland County hospitals



Economic Impact

We have data on total hospital payroll which allows us to conduct the impact analysis but not have the employment nor the components of payroll. Wheatland Memorial Healthcare's total payroll was \$3.8 million, about 8.6% of county earnings. Table 47 shows the total economic impact on Wheatland County.

Table 47. Wheatland County: Hospital economic impacts

Category	Units	Wheatland Memorial Healthcare
Total Employment	Jobs	206
Personal Income	\$ millions	\$15.0
Disposable Personal Income	\$ millions	\$13.6
Output	\$ millions	\$45.7
Population	People	384

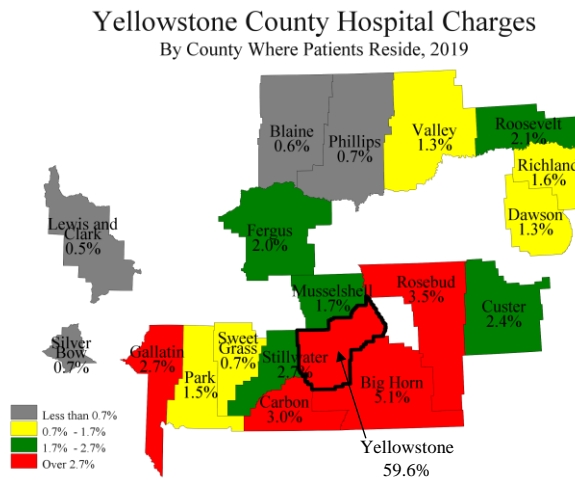
Yellowstone County

We have data for two hospitals in Yellowstone County: The Billings Clinic and SCL Health – St. Vincent Healthcare. In 2019, Yellowstone County’s population was 161,000 with a total personal income of \$8.7 billion. Yellowstone earned labor income was \$6.2 billion.

Counties Served by Yellowstone County Hospitals

Figure 44 shows total percent billing by county for Yellowstone County based hospitals. In-county billing was 60% of in-state invoices. The three largest recipient counties of Yellowstone County based care were Big Horn (5.1%), Rosebud (3.5%) and Carbon (3.0%). In addition, Yellowstone County based hospitals also provided \$221.2 million worth of services to out-of-state patients.

Figure 44. Billing by Yellowstone County hospitals



Economic Impact

Billings Clinic paid its 4,304 employees a total payroll is \$348.2 million, about 5.6% of total county earnings, and provided an additional \$70.1 million in employee benefits. SCL Health – St. Vincent Healthcare paid its 1,702 employees a total payroll is \$117.9 million, about 1.9% of total county earnings, and provided an additional \$24.9 million in employee benefits. The total economic impact of Billings Clinic and SCL Health – St. Vincent Healthcare is presented in Table 48.

Table 48. Yellowstone County: Hospital economic impacts

Category	Units	Billings Clinic	SCL Health – St. Vincent Healthcare	Total
Total Employment	Jobs	12,097	4,720	16,817
Personal Income	\$ millions	\$995.2	\$391.7	\$1,386.9
Disposable Personal Income	\$ millions	\$898.9	\$353.8	\$1,252.7
Output	\$ millions	\$2,558.2	\$1,032.1	\$3,590.3
Population	People	22,657	8,704	31,361

Table A-1: County level total economic impact (2019)

County	Total employment (jobs)	Population (people)	Millions \$		
			Personal income	Disposable personal income	Output
Beaverhead	671	1,008	\$49.8	\$44.7	\$115.1
Big Horn	492	922	\$33.8	\$30.7	\$106.3
Broadwater	190	285	\$12.5	\$11.2	\$33.0
Carbon	364	684	\$24.9	\$22.6	\$78.8
Carter	94	137	\$6.1	\$5.3	\$18.0
Cascade	10,353	18,548	\$771.3	\$694.6	\$2,072.1
Chouteau	322	581	\$21.9	\$19.8	\$65.0
Custer	550	793	\$41.6	\$35.9	\$104.8
Daniels	187	272	\$12.3	\$10.7	\$35.8
Deer Lodge	1,093	1,643	\$83.2	\$74.8	\$187.0
Fallon	186	271	\$12.0	\$10.5	\$35.7
Fergus	948	1,774	\$66.6	\$60.5	\$204.4
Flathead	11,816	20,886	\$912.0	\$818.5	\$2,120.3
Gallatin	4,338	6,596	\$296.6	\$267.1	\$751.5
Glacier	187	324	\$15.0	\$13.5	\$36.8
Hill	1,695	3,008	\$124.6	\$112.1	\$338.7
Lake	2,129	3,775	\$159.7	\$143.6	\$383.7
Lewis and Clark	5,427	9,623	\$421.7	\$379.5	\$1,118.2
Liberty	245	441	\$16.6	\$15.0	\$49.5
Lincoln	862	1,542	\$61.7	\$55.6	\$156.6
McCone	81	118	\$5.6	\$4.8	\$15.5
Madison	456	684	\$32.0	\$28.8	\$78.7
Meagher	176	263	\$12.3	\$11.1	\$30.3
Mineral	283	506	\$19.5	\$17.6	\$51.7
Missoula	9,145	16,368	\$645.2	\$581.4	\$1,666.1
Musselshell	303	569	\$20.1	\$18.3	\$65.6
Park	1,045	1,569	\$77.4	\$69.5	\$179.4
Phillips	127	182	\$9.4	\$8.1	\$24.1
Pondera	536	967	\$35.9	\$32.4	\$108.2
Powell	425	763	\$29.4	\$26.6	\$77.6
Prairie	81	117	\$5.4	\$4.7	\$15.5
Ravalli	1,845	3,267	\$140.0	\$125.8	\$331.8
Richland	835	1,199	\$65.8	\$56.7	\$158.5
Roosevelt	665	966	\$46.4	\$40.2	\$127.4
Rosebud	215	313	\$14.5	\$12.6	\$41.2

County	Total employment (jobs)	Population (people)	Millions \$		
			Personal income	Disposable personal income	Output
Sanders	758	1,363	\$52.1	\$47.0	\$138.6
Silver Bow	1,394	2,090	\$110.7	\$99.3	\$237.6
Stillwater	256	471	\$20.4	\$18.4	\$56.1
Sweet Grass	169	314	\$12.3	\$11.2	\$36.3
Teton	215	383	\$15.7	\$14.2	\$44.5
Toole	287	513	\$20.2	\$18.2	\$57.7
Valley	374	535	\$30.1	\$25.9	\$70.9
Wheatland	206	384	\$15.0	\$13.6	\$45.7
Yellowstone	16,817	31,361	\$1,386.9	\$1,252.7	\$3,590.3