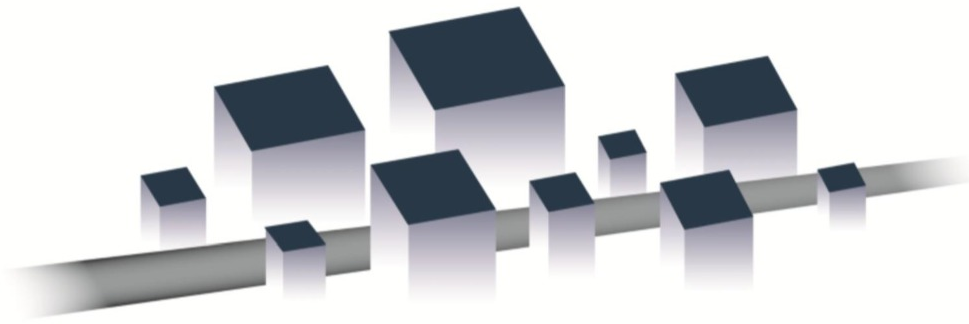




RETAIL ATTRACTIONS, LLC

Economic Development Consulting

**Great Falls, Montana
Trade Area
3rd Quarter 2025**



Great Falls Area Retail Consumer Data:

Our company identifies and proves market potential for retail and mixed-use development in cities all over the country. In the twenty plus years we have been consulting with communities and landowners, pulling market data and consumer spending trends have become second nature to our staff. Recently we were contracted to Great Falls, Montana MSA, to a private developer and one of the best development sites in Montana. Normal data pulls will not provide the complete picture of the Great Falls market because of a missing piece of the puzzle. Trade Area demographics and consumer expenditures for the Great Falls region in Montana shows a strong retail market but needs some additional information to present a full and comprehensive analysis of the consumer draw not only to local and regional consumers in the trade area but also to the influx and consumer demand from Canada. Data on the Canadian retail consumers is crucial to the vitality and depth of the regional draw of the proposed The Falls at Great Falls development site. This data is sometimes hard to quantify because data suppliers in the US most times do not provide for the Canadian impact. The basic trade area for Great Falls shows depth and plenty of disposable income and features a consumer draw of at least one hundred Montana zip codes, but as we have stated the retail market is not well represented just from a large swath of Montana consumers. The real secret of this market is the boost from recreational tourists, visitors to the vast "Big Sky" beauty of Montana, and the impact of the Canadian consumer desiring to profit from no State of Montana sales tax, a more diverse retail inventory, and proximity and access to the retailers and restaurants in the Great Falls trade area.

What is known to the locals as "The Great Falls Golden Triangle Trade Area" is an economic region in north central Montana. While Great Falls has about 60,000 people in the city limits, a larger MSA pull shows the Great Falls Metropolitan Statistical area, which includes all of Cascade County at about 84,000 people. The regional "Golden Triangle" trade area is 13 county region covering about 44,000 square miles and includes Cascade, Chouteau, Pondera, Teton, Toole, Glacier, Liberty, and Hill counties, and an estimated population of 150,000. This alone is a vibrant consumer base but fails to really portray the true consumer draw because it does not include the Canadian consumer impact.

The Canadian impact on Great Falls retail sales is dynamic and the proximity of the Great Falls area to Canadian consumers is foundational to the economy of Great Falls. The pull of Canadian shoppers, particularly for Southern Alberta, for example Calgary and Lethbridge makes perfect sense because the Great Falls market is the closest United States metro to Calgary, making it a significant shopping destination for Canadian shoppers seeking lower pricing, unique products, and tax savings.

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What motivates Canadian consumers to make the trip are three main reasons: No sales tax from the State of Montana makes higher end retail goods; for example, electronics, appliances, clothing, automobiles and recreational products much more affordable than Canadian retail. Domestic retail inventory in the Great Falls market offers more stores, and more diverse retail products not readily available in smaller Canadian markets. Finally, the synergy provided by tourist spending for the outdoor attractions, (Glacier National Park, ten museums, and several other hiking, camping, hunting and fishing attractions) draw well over a million Canadian overnight visits to the Great Falls metro annually.

Summary:

Just from a consumer standpoint The Great Falls Golden Triangle draws from a core residential population of approximately 200,000 across thirteen counties. The Canadian pull factor adds a significant number of retail shoppers from 150,000 to nearly half a million annual Canadian shoppers from southern Alberta make the trade area work. When you consider the recreational and outdoor tourist attractions of the market make the trade area population easily 800,000 people.

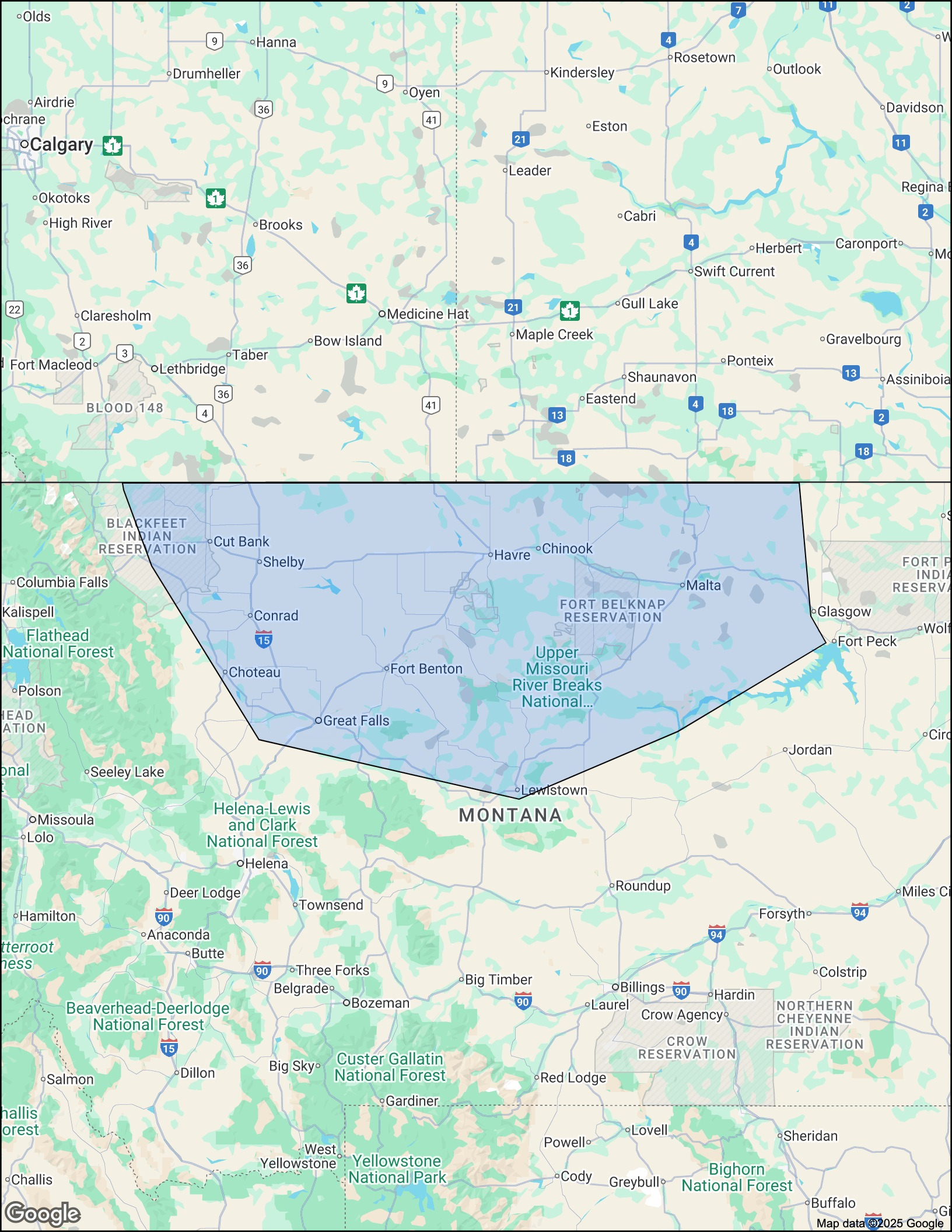
The Institute of Tourism and Recreation Research from the University of Montana shows that in 2024 non-resident visitors to Montana spent an estimated \$5.0 billion dollars. The same research shows that in 2024 the total Nonresident Travelers that visited the Great Falls area at 1.5 million. These reports are available for a much more thorough review upon request.

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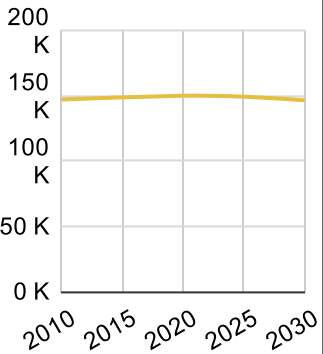
Demographics



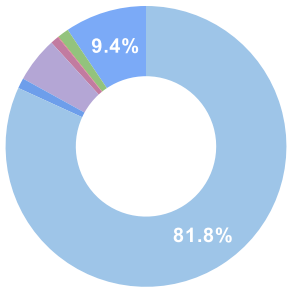
Trade Area

Great Falls, Montana

Population		
Estimated Population (2025)	149,653	
Projected Population (2030)	146,896	
Census Population (2020)	150,410	
Census Population (2010)	147,456	
Projected Annual Growth (2025-2030)	-2,757	-0.4%
Historical Annual Growth (2020-2025)	-757	-0.1%
Historical Annual Growth (2010-2020)	2,954	0.2%
Estimated Population Density (2025)	5	psm
Trade Area Size	31,875.4	sq mi



Race and Ethnicity (2025)		
Not Hispanic or Latino Population		
White	119,382	83.2%
Black or African American	1,666	1.2%
American Indian or Alaska Native	7,626	5.3%
Asian	1,404	1.0%
Hawaiian or Pacific Islander	93	-
Other Race	1,093	0.8%
Two or More Races	12,168	8.5%
Hispanic or Latino Population		
White	3,076	49.5%
Black or African American	108	1.7%
American Indian or Alaska Native	189	3.0%
Asian	46	0.7%
Hispanic Hawaiian or Pacific Islander	21	0.3%
Other Race	858	13.8%
Two or More Races	1,923	30.9%



Trade Area

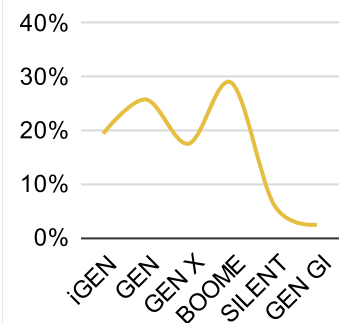
Great Falls, Montana

Age Distribution (2025)

Age Under 5 Years	8,974	6.0%
Age 5 to 9 Years	10,128	6.8%
Age 10 to 14 Years	9,890	6.6%
Age 15 to 19 Years	9,467	6.3%
Age 20 to 24 Years	9,313	6.2%
Age 25 to 29 Years	9,488	6.3%
Age 30 to 34 Years	10,271	6.9%
Age 35 to 39 Years	9,538	6.4%
Age 40 to 44 Years	9,057	6.1%
Age 45 to 49 Years	7,603	5.1%
Age 50 to 54 Years	7,572	5.1%
Age 55 to 59 Years	8,307	5.6%
Age 60 to 64 Years	10,066	6.7%
Age 65 to 69 Years	9,377	6.3%
Age 70 to 74 Years	7,893	5.3%
Age 75 to 79 Years	5,510	3.7%
Age 80 to 84 Years	3,597	2.4%
Age 85 Years or Over	3,604	2.4%
Median Age	38.7	

Generation (2025)

iGeneration (Age Under 15 Years)	28,992	19.4%
Generation 9/11 Millennials (Age 15 to 34 Years)	38,539	25.8%
Gen Xers (Age 35 to 49 Years)	26,198	17.5%
Baby Boomers (Age 50 to 74 Years)	43,214	28.9%
Silent Generation (Age 75 to 84 Years)	9,107	6.1%
G.I. Generation (Age 85 Years or Over)	3,604	2.4%

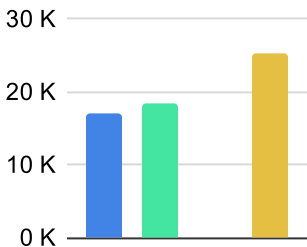
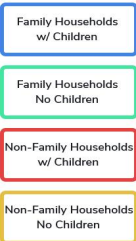


Trade Area

Great Falls, Montana

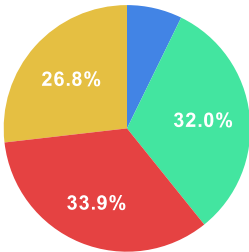
Household Type (2025)

Total Households	60,828
Family Households	35,597 58.5%
Family Households with Children	17,113 48.1%
Family Households No Children	18,484 51.9%
Non-Family Households	25,231 41.5%
Non-Family Households with Children	43 0.2%
Non-Family Households No Children	25,188 99.8%



Education Attainment (2025)

Elementary or Some High School	7,375 7.2%
High School Graduate	32,589 32.0%
Some College or Associate Degree	34,587 33.9%
Bachelor or Graduate Degree	27,330 26.8%



Household Income (2025)

Estimated Average Household Income	\$88,224
Estimated Median Household Income	\$67,556
HH Income Under \$10,000	3,278 5.4%
HH Income \$10,000 to \$34,999	12,474 20.5%
HH Income \$35,000 to \$49,999	7,968 13.1%
HH Income \$50,000 to \$74,999	11,070 18.2%
HH Income \$75,000 to \$99,999	8,401 13.8%
HH Income \$100,000 to \$149,999	10,038 16.5%
HH Income \$150,000 or More	7,600 12.5%

Trade Area

Great Falls, Montana

Population

Estimated Population (2025)	149,653	
Projected Population (2030)	146,896	
Census Population (2020)	150,410	
Census Population (2010)	147,456	
Projected Annual Growth (2025-2030)	-2,757	-0.4%
Historical Annual Growth (2020-2025)	-757	-0.1%
Historical Annual Growth (2010-2020)	2,954	0.2%
Estimated Population Density (2025)	5	psm
Trade Area Size	31,875.4	sq mi

Households

Estimated Households (2025)	60,828	
Projected Households (2030)	59,923	
Census Households (2020)	60,767	
Census Households (2010)	59,965	
Projected Annual Growth (2025-2030)	-904	-0.3%
Historical Annual Change (2010-2025)	863	-

Average Household Income

Estimated Average Household Income (2025)	\$88,224	
Projected Average Household Income (2030)	\$87,119	
Census Average Household Income (2010)	\$52,200	
Census Average Household Income (2000)	\$40,085	
Projected Annual Change (2025-2030)	-\$1,105	-0.3%
Historical Annual Change (2000-2025)	\$48,140	4.8%

Median Household Income

Estimated Median Household Income (2025)	\$67,556	
Projected Median Household Income (2030)	\$66,952	
Census Median Household Income (2010)	\$42,565	
Census Median Household Income (2000)	\$32,222	
Projected Annual Change (2025-2030)	-\$604	-0.2%
Historical Annual Change (2000-2025)	\$35,335	4.4%

Per Capita Income

Estimated Per Capita Income (2025)	\$36,430	
Projected Per Capita Income (2030)	\$36,120	
Census Per Capita Income (2010)	\$21,227	
Census Per Capita Income (2000)	\$15,882	
Projected Annual Change (2025-2030)	-\$310	-0.2%
Historical Annual Change (2000-2025)	\$20,548	5.2%
Estimated Average Household Net Worth (2025)	\$873,560	



Trade Area		
Great Falls, Montana		
Race and Ethnicity		
Total Population (2025)	149,653	
White (2025)	122,458	81.8%
Black or African American (2025)	1,774	1.2%
American Indian or Alaska Native (2025)	7,814	5.2%
Asian (2025)	1,450	1.0%
Hawaiian or Pacific Islander (2025)	114	-
Other Race (2025)	1,950	1.3%
Two or More Races (2025)	14,091	9.4%
Population < 18 (2025)	34,894	23.3%
White Not Hispanic	24,942	71.5%
Black or African American	423	1.2%
Asian	269	0.8%
Other Race Not Hispanic	7,165	20.5%
Hispanic	2,095	6.0%
Not Hispanic or Latino Population (2025)	143,432	95.8%
Not Hispanic White	119,382	83.2%
Not Hispanic Black or African American	1,666	1.2%
Not Hispanic American Indian or Alaska Native	7,626	5.3%
Not Hispanic Asian	1,404	1.0%
Not Hispanic Hawaiian or Pacific Islander	93	-
Not Hispanic Other Race	1,093	0.8%
Not Hispanic Two or More Races	12,168	8.5%
Hispanic or Latino Population (2025)	6,221	4.2%
Hispanic White	3,076	49.5%
Hispanic Black or African American	108	1.7%
Hispanic American Indian or Alaska Native	189	3.0%
Hispanic Asian	46	0.7%
Hispanic Hawaiian or Pacific Islander	21	0.3%
Hispanic Other Race	858	13.8%
Hispanic Two or More Races	1,923	30.9%
Not Hispanic or Latino Population (2020)	144,805	96.3%
Hispanic or Latino Population (2020)	5,605	3.7%
Not Hispanic or Latino Population (2010)	143,566	97.4%
Hispanic or Latino Population (2010)	3,890	2.6%
Not Hispanic or Latino Population (2030)	140,291	95.5%
Hispanic or Latino Population (2030)	6,605	4.5%
Projected Annual Growth (2025-2030)	385	1.2%
Historical Annual Growth (2010-2020)	1,715	4.4%



Trade Area		
Great Falls, Montana		
Total Age Distribution (2025)		
Total Population	149,653	
Age Under 5 Years	8,974	6.0%
Age 5 to 9 Years	10,128	6.8%
Age 10 to 14 Years	9,890	6.6%
Age 15 to 19 Years	9,467	6.3%
Age 20 to 24 Years	9,313	6.2%
Age 25 to 29 Years	9,488	6.3%
Age 30 to 34 Years	10,271	6.9%
Age 35 to 39 Years	9,538	6.4%
Age 40 to 44 Years	9,057	6.1%
Age 45 to 49 Years	7,603	5.1%
Age 50 to 54 Years	7,572	5.1%
Age 55 to 59 Years	8,307	5.6%
Age 60 to 64 Years	10,066	6.7%
Age 65 to 69 Years	9,377	6.3%
Age 70 to 74 Years	7,893	5.3%
Age 75 to 79 Years	5,510	3.7%
Age 80 to 84 Years	3,597	2.4%
Age 85 Years or Over	3,604	2.4%
Median Age	38.7	
Age 19 Years or Less	38,458	25.7%
Age 20 to 64 Years	81,214	54.3%
Age 65 Years or Over	29,980	20.0%
Female Age Distribution (2025)		
Female Population	70,411	47.0%
Age Under 5 Years	4,298	6.1%
Age 5 to 9 Years	4,758	6.8%
Age 10 to 14 Years	4,543	6.5%
Age 15 to 19 Years	4,208	6.0%
Age 20 to 24 Years	3,654	5.2%
Age 25 to 29 Years	4,355	6.2%
Age 30 to 34 Years	4,714	6.7%
Age 35 to 39 Years	4,490	6.4%
Age 40 to 44 Years	4,241	6.0%
Age 45 to 49 Years	3,580	5.1%
Age 50 to 54 Years	3,637	5.2%
Age 55 to 59 Years	4,031	5.7%
Age 60 to 64 Years	4,971	7.1%
Age 65 to 69 Years	4,702	6.7%
Age 70 to 74 Years	3,916	5.6%
Age 75 to 79 Years	2,667	3.8%
Age 80 to 84 Years	1,848	2.6%
Age 85 Years or Over	1,798	2.6%
Female Median Age	40.0	
Age 19 Years or Less	17,807	25.3%
Age 20 to 64 Years	37,673	53.5%
Age 65 Years or Over	14,931	21.2%



Trade Area		
Great Falls, Montana		
Male Age Distribution (2025)		
Male Population	79,241	53.0%
Age Under 5 Years	4,675	5.9%
Age 5 to 9 Years	5,370	6.8%
Age 10 to 14 Years	5,347	6.7%
Age 15 to 19 Years	5,259	6.6%
Age 20 to 24 Years	5,659	7.1%
Age 25 to 29 Years	5,133	6.5%
Age 30 to 34 Years	5,557	7.0%
Age 35 to 39 Years	5,048	6.4%
Age 40 to 44 Years	4,816	6.1%
Age 45 to 49 Years	4,023	5.1%
Age 50 to 54 Years	3,935	5.0%
Age 55 to 59 Years	4,275	5.4%
Age 60 to 64 Years	5,095	6.4%
Age 65 to 69 Years	4,675	5.9%
Age 70 to 74 Years	3,976	5.0%
Age 75 to 79 Years	2,843	3.6%
Age 80 to 84 Years	1,749	2.2%
Age 85 Years or Over	1,806	2.3%
Male Median Age	37.7	
Age 19 Years or Less	20,651	26.1%
Age 20 to 64 Years	43,541	54.9%
Age 65 Years or Over	15,049	19.0%
Males per 100 Females (2025)		
Overall Comparison	113	
Age Under 5 Years	109	52.1%
Age 5 to 9 Years	113	53.0%
Age 10 to 14 Years	118	54.1%
Age 15 to 19 Years	125	55.5%
Age 20 to 24 Years	155	60.8%
Age 25 to 29 Years	118	54.1%
Age 30 to 34 Years	118	54.1%
Age 35 to 39 Years	112	52.9%
Age 40 to 44 Years	114	53.2%
Age 45 to 49 Years	112	52.9%
Age 50 to 54 Years	108	52.0%
Age 55 to 59 Years	106	51.5%
Age 60 to 64 Years	103	50.6%
Age 65 to 69 Years	99	49.9%
Age 70 to 74 Years	102	50.4%
Age 75 to 79 Years	107	51.6%
Age 80 to 84 Years	95	48.6%
Age 85 Years or Over	100	50.1%
Age 19 Years or Less	116	53.7%
Age 20 to 39 Years	124	55.4%
Age 40 to 64 Years	108	52.0%
Age 65 Years or Over	101	50.2%

Trade Area

Great Falls, Montana

Household Type (2025)

Total Households	60,828	
Households with Children	17,156	28.2%
Average Household Size	2.3	
Household Density per Square Mile	2	
Population Family	109,333	73.1%
Population Non-Family	33,548	22.4%
Population Group Quarters	6,772	4.5%
Family Households	35,597	58.5%
Married Couple Households	27,506	77.3%
Other Family Households with Children	8,091	22.7%
Family Households with Children	17,113	48.1%
Married Couple with Children	11,604	67.8%
Other Family Households with Children	5,508	32.2%
Family Households No Children	18,484	51.9%
Married Couple No Children	15,902	86.0%
Other Family Households No Children	2,582	14.0%
Non-Family Households	25,231	41.5%
Non-Family Households with Children	43	0.2%
Non-Family Households No Children	25,188	99.8%
Average Family Household Size	3.1	
Average Family Income	\$112,251	
Median Family Income	\$85,702	
Average Non-Family Household Size	1.3	

Marital Status (2025)

Population Age 15 Years or Over	120,661	
Never Married	34,537	28.6%
Currently Married	59,724	49.5%
Previously Married	26,401	21.9%
Separated	4,361	16.5%
Widowed	7,375	27.9%
Divorced	14,665	55.5%

Educational Attainment (2025)

Adult Population Age 25 Years or Over	101,881	
Elementary (Grade Level 0 to 8)	2,751	2.7%
Some High School (Grade Level 9 to 11)	4,624	4.5%
High School Graduate	32,589	32.0%
Some College	23,897	23.5%
Associate Degree Only	10,691	10.5%
Bachelor Degree Only	18,252	17.9%
Graduate Degree	9,078	8.9%
Any College (Some College or Higher)	61,917	60.8%
College Degree + (Bachelor Degree or Higher)	27,330	26.8%



Trade Area			
Great Falls, Montana			
Housing			
Total Housing Units (2025)	70,411		
Total Housing Units (2020)	69,433		
Historical Annual Growth (2020-2025)	979	-	
Housing Units Occupied (2025)	60,828	86.4%	
Housing Units Owner-Occupied	39,633	65.2%	
Housing Units Renter-Occupied	21,195	34.8%	
Housing Units Vacant (2025)	9,584	13.6%	
Household Size (2025)			
Total Households	60,828		
1 Person Households	20,296	33.4%	
2 Person Households	21,268	35.0%	
3 Person Households	7,625	12.5%	
4 Person Households	6,180	10.2%	
5 Person Households	3,050	5.0%	
6 Person Households	1,441	2.4%	
7 or More Person Households	969	1.6%	
Household Income Distribution (2025)			
HH Income \$200,000 or More	3,589	5.9%	
HH Income \$150,000 to \$199,999	4,011	6.6%	
HH Income \$125,000 to \$149,999	3,940	6.5%	
HH Income \$100,000 to \$124,999	6,099	10.0%	
HH Income \$75,000 to \$99,999	8,401	13.8%	
HH Income \$50,000 to \$74,999	11,070	18.2%	
HH Income \$35,000 to \$49,999	7,968	13.1%	
HH Income \$25,000 to \$34,999	5,599	9.2%	
HH Income \$15,000 to \$24,999	4,477	7.4%	
HH Income \$10,000 to \$14,999	2,399	3.9%	
HH Income Under \$10,000	3,278	5.4%	
Household Vehicles (2025)			
Households 0 Vehicles Available	4,029	6.6%	
Households 1 Vehicle Available	17,898	29.4%	
Households 2 Vehicles Available	21,013	34.5%	
Households 3 or More Vehicles Available	17,887	29.4%	
Total Vehicles Available	124,079		
Average Vehicles per Household	2.0		
Owner-Occupied Household Vehicles	92,765	74.8%	
Average Vehicles per Owner-Occupied Household	2.3		
Renter-Occupied Household Vehicles	31,314	25.2%	
Average Vehicles per Renter-Occupied Household	1.5		
Travel Time (2025)			
Worker Base Age 16 years or Over	69,171		
Travel to Work in 14 Minutes or Less	34,125	49.3%	
Travel to Work in 15 to 29 Minutes	19,098	27.6%	
Travel to Work in 30 to 59 Minutes	6,550	9.5%	
Travel to Work in 60 Minutes or More	2,559	3.7%	
Work at Home	6,838	9.9%	
Average Minutes Travel to Work	13.6		

Trade Area

Great Falls, Montana

Transportation To Work (2025)

Worker Base Age 16 years or Over	69,171	
Drive to Work Alone	49,402	71.4%
Drive to Work in Carpool	7,810	11.3%
Travel to Work by Public Transportation	597	0.9%
Drive to Work on Motorcycle	66	-
Bicycle to Work	636	0.9%
Walk to Work	3,325	4.8%
Other Means	498	0.7%
Work at Home	6,838	9.9%

Daytime Demographics (2025)

Total Businesses	6,014	
Total Employees	57,195	
Company Headquarter Businesses	248	4.1%
Company Headquarter Employees	7,159	12.5%
Employee Population per Business	9.5	to 1
Residential Population per Business	24.9	to 1
Adj. Daytime Demographics Age 16 Years or Over	103,664	

Labor Force

Labor Population Age 16 Years or Over (2025)	118,672	
Labor Force Total Males (2025)	62,831	52.9%
Male Civilian Employed	38,024	60.5%
Male Civilian Unemployed	1,204	1.9%
Males in Armed Forces	2,504	4.0%
Males Not in Labor Force	21,099	33.6%
Labor Force Total Females (2025)	55,842	47.1%
Female Civilian Employed	31,181	55.8%
Female Civilian Unemployed	900	1.6%
Females in Armed Forces	495	0.9%
Females Not in Labor Force	23,266	41.7%
Unemployment Rate	2,104	1.8%

Occupation (2025)

Occupation Population Age 16 Years or Over	69,171	
Occupation Total Males	37,990	54.9%
Occupation Total Females	31,181	45.1%
Management, Business, Financial Operations	13,365	19.3%
Professional, Related	14,767	21.3%
Service	13,210	19.1%
Sales, Office	12,614	18.2%
Farming, Fishing, Forestry	1,726	2.5%
Construction, Extraction, Maintenance	5,188	7.5%
Production, Transport, Material Moving	8,301	12.0%
White Collar Workers	40,745	58.9%
Blue Collar Workers	28,425	41.1%



Trade Area

Great Falls, Montana

Units In Structure (2025)

Total Units	60,828	
1 Detached Unit	42,354	69.6%
1 Attached Unit	2,681	4.4%
2 Units	1,368	2.2%
3 to 4 Units	1,989	3.3%
5 to 9 Units	2,381	3.9%
10 to 19 Units	2,907	4.8%
20 to 49 Units	1,780	2.9%
50 or More Units	641	1.1%
Mobile Home or Trailer	4,472	7.4%
Other Structure	255	0.4%

Homes Built By Year (2025)

Homes Built 2020 or later	542	0.8%
Homes Built 2010 to 2019	4,252	6.0%
Homes Built 2000 to 2009	5,220	7.4%
Homes Built 1990 to 1999	4,104	5.8%
Homes Built 1980 to 1989	6,196	8.8%
Homes Built 1970 to 1979	9,575	13.6%
Homes Built 1960 to 1969	6,929	9.8%
Homes Built 1950 to 1959	8,293	11.8%
Homes Built 1940 to 1949	4,186	5.9%
Homes Built Before 1939	11,532	16.4%
Median Age of Homes	55.3	yrs

Home Values (2025)

Owner Specified Housing Units	39,633	
Home Values \$1,000,000 or More	955	2.4%
Home Values \$750,000 to \$999,999	1,039	2.6%
Home Values \$500,000 to \$749,999	3,669	9.3%
Home Values \$400,000 to \$499,999	3,091	7.8%
Home Values \$300,000 to \$399,999	7,456	18.8%
Home Values \$250,000 to \$299,999	5,144	13.0%
Home Values \$200,000 to \$249,999	4,304	10.9%
Home Values \$175,000 to \$199,999	1,709	4.3%
Home Values \$150,000 to \$174,999	3,818	9.6%
Home Values \$125,000 to \$149,999	1,132	2.9%
Home Values \$100,000 to \$124,999	1,743	4.4%
Home Values \$90,000 to \$99,999	355	0.9%
Home Values \$80,000 to \$89,999	494	1.2%
Home Values \$70,000 to \$79,999	531	1.3%
Home Values \$60,000 to \$69,999	328	0.8%
Home Values \$50,000 to \$59,999	805	2.0%
Home Values \$35,000 to \$49,999	1,131	2.9%
Home Values \$25,000 to \$34,999	390	1.0%
Home Values \$10,000 to \$24,999	897	2.3%
Home Values Under \$10,000	642	1.6%
Owner-Occupied Median Home Value	\$260,966	
Renter-Occupied Median Rent	\$802	



Trade Area		
Great Falls, Montana		
Total Annual Consumer Expenditure (2025)		
Total Household Expenditure	\$5.41 B	
Total Non-Retail Expenditure	\$2.58 B	
Total Retail Expenditure	\$2.83 B	
Alcoholic Beverages	\$32.76 M	
Apparel	\$99.91 M	
Contributions	\$167.09 M	
Education	\$120.13 M	
Entertainment	\$310.03 M	
Food Away From Home	\$237.05 M	
Grocery	\$369.86 M	
Health Care	\$398.73 M	
Household Furnishings and Equipment	\$142.85 M	
Household Operations	\$101.09 M	
Miscellaneous Expenses	\$92.45 M	
Personal Care	\$71.77 M	
Shelter	\$874.5 M	
Tax and Retirement	\$1.16 B	
Tobacco and Related	\$29.8 M	
Transportation	\$943.15 M	
Utilities	\$264.81 M	
Monthly Household Consumer Expenditure (2025)		
Total Household Expenditure	\$7,413	
Total Non-Retail Expenditure	\$3,541	47.8%
Total Retail Expenditures	\$3,872	52.2%
Alcoholic Beverages	\$45	0.6%
Apparel	\$137	1.8%
Contributions	\$229	3.1%
Education	\$165	2.2%
Entertainment	\$425	5.7%
Food Away From Home	\$325	4.4%
Grocery	\$507	6.8%
Health Care	\$546	7.4%
Household Furnishings and Equipment	\$196	2.6%
Household Operations	\$138	1.9%
Miscellaneous Expenses	\$127	1.7%
Personal Care	\$98	1.3%
Shelter	\$1,198	16.2%
Tax and Retirement	\$1,582	-
Tobacco and Related	\$41	0.6%
Transportation	\$1,292	17.4%
Utilities	\$363	4.9%

OPPORTUNITY GAP CATEGORY INFORMATION

(RETAIL CATEGORIES)

Vehicle and Parts Dealers

New and used automobile dealers, motorcycle dealers, recreation vehicle dealers, all-terrain vehicles dealers, boat dealers, auto parts stores, auto accessories stores and tire dealers

Furniture and Home Furnishings Stores

Furniture stores, home furnishing stores, home decorating stores and floor covering stores

Electronics and Appliance Stores

Household appliance stores, electronics stores, computer and software stores and camera and photographic equipment stores

Building Materials and Garden Supply Stores

Building material and supply dealers, home improvement centers, paint and wallpaper stores, hardware stores, lumberyards, lawn and garden stores, outdoor power equipment stores and nursery and garden centers

Food and Beverage Stores

Grocery stores, supermarkets, convenience stores, specialty food stores and beer, wine, and liquor stores

Health and Personal Care Stores

Pharmacies, drug stores, cosmetic dealers, beauty supply stores, perfume stores, optical goods stores, health care stores and personal care stores

Gasoline Stations

Gasoline stations and gasoline stations with convenience stores

Clothing and Clothing Accessories Stores

Men's clothing stores, women's clothing stores, children's and infants clothing stores, family clothing stores, clothing accessories stores, shoe stores, jewelry stores, luggage stores, leather goods stores

Sporting Goods and Hobby Stores

Sporting goods stores, hobby stores, toy stores, sewing and needlepoint stores, musical instrument and supply stores, book stores, newsstands, music stores

General Merchandise Stores

Department stores and other general merchandise stores

Miscellaneous Store Retailers

Florists, office supply stores, stationery stores, gift and souvenir stores, used merchandise stores and other miscellaneous retailers

Foodservice and Drinking Places

Full-service restaurants, limited service eating places, special foodservices, taverns and bars

Retail Gap Report



Trade Area

Great Falls, Montana

	Potential / Sales	Index
Clothing, Clothing Accessories Stores	\$174.88 M / \$74.11 M	58
Men's Clothing Stores	\$6.98 M / \$1.13 M	84
Women's Clothing Stores	\$14.59 M / \$7.54 M	48
Children's, Infants' Clothing Stores	\$13.83 M / \$2.04 M	85
Family Clothing Stores	\$85.09 M / \$52.84 M	38
Clothing Accessory Stores	\$3.97 M / \$314.13 K	92
Other Apparel Stores	\$5.09 M / \$2.25 M	56
Shoe Stores	\$36.39 M / \$3.86 M	89
Jewelry Stores	\$7.96 M / \$4.13 M	48
Luggage Stores	\$975.69 K / \$-2	100
Furniture, Home Furnishings Stores	\$152.39 M / \$119.79 M	21
Furniture Stores	\$69.4 M / \$65.29 M	6
Floor Covering Stores	\$9.93 M / \$10.91 M	-9
Other Home Furnishing Stores	\$73.06 M / \$43.59 M	40
Electronics, Appliance Stores	\$152.07 M / \$78.34 M	48
Building Material, Garden Equipment, Supplies Dealers	\$146.15 M / \$203.14 M	-28
Home Centers	\$82.07 M / \$75.8 M	8
Paint, Wallpaper Stores	\$17.25 M / \$18.77 M	-8
Hardware Stores	\$9.2 M / \$36.7 M	-75
Other Building Materials Stores	\$25.65 M / \$56.3 M	-54
Outdoor Power Equipment Stores	\$1.58 M / \$-3	100
Nursery, Garden Stores	\$10.41 M / \$15.56 M	-33
Food, Beverage Stores	\$228.35 M / \$242.42 M	-6
Grocery Stores	\$175.75 M / \$174.2 M	1
Convenience Stores	\$16.07 M / \$19.93 M	-19
Meat Markets	\$1.03 M / \$951.27 K	8
Fish, Seafood Markets	\$354.18 K / \$-3	100
Fruit, Vegetable Markets	\$675.64 K / \$-1	100
Other Specialty Food Markets	\$1.39 M / \$427.39 K	69
Liquor Stores	\$33.08 M / \$46.91 M	-29

Retail Gap Report



Trade Area

Great Falls, Montana

	Potential / Sales	Index
Health, Personal Care Stores	\$145.41 M / \$162.99 M	-11
Pharmacy, Drug Stores	\$128.08 M / \$151.88 M	-16
Cosmetics, Beauty Stores	\$7.32 M / \$1.32 M	82
Optical Goods Stores	\$2.17 M / \$1.76 M	19
Other Health, Personal Care Stores	\$7.84 M / \$8.02 M	-2
Sporting Goods, Hobby, Book, Music Stores	\$177.53 M / \$222.36 M	-20
Sporting Goods Stores	\$67.08 M / \$122.15 M	-45
Hobby, Toy, Game Stores	\$48.15 M / \$49.82 M	-3
Sewing, Needlecraft Stores	\$36.27 M / \$37.52 M	-3
Musical Instrument Stores	\$12.61 M / \$5.18 M	59
Book Stores	\$13.42 M / \$7.69 M	43
General Merchandise Stores	\$562.04 M / \$286.66 M	49
Department Stores	\$196.12 M / \$118.29 M	40
Warehouse Superstores	\$311.23 M / \$110.26 M	65
Other General Merchandise Stores	\$54.69 M / \$58.11 M	-6
Miscellaneous Store Retailers	\$72.85 M / \$93.48 M	-22
Florists	\$1.73 M / \$1.13 M	35
Office, Stationary Stores	\$7.27 M / \$11.09 M	-34
Gift, Souvenir Stores	\$14.82 M / \$7.89 M	47
Used Merchandise Stores	\$5.23 M / \$2.45 M	53
Pet, Pet Supply Stores	\$12.82 M / \$4.08 M	68
Art Dealers	\$2.14 M / \$4.88 M	-56
Mobile Home Dealers	\$1.44 M / \$252.81 K	82
Other Miscellaneous Retail Stores	\$27.4 M / \$61.7 M	-56
Non-Store Retailers	\$333.67 M / \$11.57 M	97
Mail Order, Catalog Stores	\$312.57 M / \$6.72 M	98
Vending Machines	\$1.44 M / \$371.71 K	74
Fuel Dealers	\$1.83 M / \$974.03 K	47
Other Direct Selling Establishments	\$17.81 M / \$3.5 M	80

Retail Gap Report



Trade Area

Great Falls, Montana

	Potential / Sales	Index
Accommodation, Food Services	\$293.97 M / \$264.26 M	10
Hotels, Other Travel Accommodations	\$18.95 M / \$18.15 M	4
RV Parks	\$185.1 K / \$225.17 K	-18
Rooming, Boarding Houses	\$105.53 K / -	100
Full Service Restaurants	\$171.74 M / \$129.48 M	25
Limited Service Restaurants	\$79.72 M / \$66.62 M	16
Special Food Services, Catering	\$23.27 M / \$13.01 M	44
Drinking Places	\$16.38 M / \$53.15 M	-69
Gasoline Stations	\$118.66 M / \$144.44 M	-18
Motor Vehicle, Parts Dealers	\$252.05 M / \$394.62 M	-36
New Car Dealers	\$145.33 M / \$165.96 M	-12
Used Car Dealers	\$13.45 M / \$9.71 M	28
Recreational Vehicle Dealers	\$25.86 M / \$65.35 M	-60
Motorcycle, Boat Dealers	\$34.19 M / \$74.04 M	-54
Auto Parts, Accessories	\$21.29 M / \$53.07 M	-60
Tire Dealers	\$11.93 M / \$26.48 M	-55
2025 Population	149,653	
2030 Population	146,896	
% Population Change 2025-2030	-1.8%	
2025 Adult Population Age 18+	114,759	
2025 Population Male	79,241	
2025 Population Female	70,411	
2025 Households	60,828	
2025 Median Household Income	67,556	
2025 Average Household Income	88,224	

Retail Potential

Retail Potential Profile



Trade Area	
Great Falls, Montana	
2025 Population	149,653
2030 Population	146,896
% Population Change 2020-2025	-0.5%
2025 Adult Population Age 18+	\$114,759
2025 Population Male	\$79,241
2025 Population Female	\$70,411
2025 Households	\$60,828
2025 Median Household Income	\$67,556
2025 Average Household Income	\$88,224
Clothing, Clothing Accessories Stores	\$174.88 M
Men's Clothing Stores	\$6.98 M
Women's Clothing Stores	\$14.59 M
Children's, Infants' Clothing Stores	\$13.83 M
Family Clothing Stores	\$85.09 M
Clothing Accessory Stores	\$3.97 M
Other Apparel Stores	\$5.09 M
Shoe Stores	\$36.39 M
Jewelry Stores	\$7.96 M
Luggage Stores	\$975.69 K
Furniture, Home Furnishings Stores	\$152.39 M
Furniture Stores	\$69.4 M
Floor Covering Stores	\$9.93 M
Other Home Furnishing Stores	\$73.06 M
Electronics, Appliance Stores	\$152.07 M
Gasoline Stations	\$118.66 M
Building Material, Garden Equipment, Supplies Dealers	\$146.15 M
Home Centers	\$82.07 M
Paint, Wallpaper Stores	\$17.25 M
Hardware Stores	\$9.2 M
Other Building Materials Stores	\$25.65 M
Outdoor Power Equipment Stores	\$1.58 M
Nursery, Garden Stores	\$10.41 M
Food, Beverage Stores	\$228.35 M
Grocery Stores	\$175.75 M
Convenience Stores	\$16.07 M
Meat Markets	\$1.03 M
Fish, Seafood Markets	\$354.18 K
Fruit, Vegetable Markets	\$675.64 K
Other Specialty Food Markets	\$1.39 M
Liquor Stores	\$33.08 M

Retail Potential Profile



Trade Area	
Great Falls, Montana	
Health, Personal Care Stores	\$145.41 M
Pharmacy, Drug Stores	\$128.08 M
Cosmetics, Beauty Stores	\$7.32 M
Optical Goods Stores	\$2.17 M
Other Health, Personal Care Stores	\$7.84 M
Sporting Goods, Hobby, Book, Music Stores	\$177.53 M
Sporting Goods Stores	\$67.08 M
Hobby, Toy, Game Stores	\$48.15 M
Sewing, Needlecraft Stores	\$36.27 M
Musical Instrument Stores	\$12.61 M
Book Stores	\$13.42 M
General Merchandise Stores	\$562.04 M
Department Stores	\$196.12 M
Warehouse Superstores	\$311.23 M
Other General Merchandise Stores	\$54.69 M
Miscellaneous Store Retailers	\$72.85 M
Florists	\$1.73 M
Office, Stationary Stores	\$7.27 M
Gift, Souvenir Stores	\$14.82 M
Used Merchandise Stores	\$5.23 M
Pet, Pet Supply Stores	\$12.82 M
Art Dealers	\$2.14 M
Mobile Home Dealers	\$1.44 M
Other Miscellaneous Retail Stores	\$27.4 M
Non-Store Retailers	\$333.67 M
Mail Order, Catalog Stores	\$312.57 M
Vending Machines	\$1.44 M
Fuel Dealers	\$1.83 M
Other Direct Selling Establishments	\$17.81 M
Accommodation, Food Services	\$310.34 M
Hotels, Other Travel Accommodations	\$18.95 M
RV Parks	\$185.1 K
Rooming, Boarding Houses	\$105.53 K
Full Service Restaurants	\$171.74 M
Limited Service Restaurants	\$79.72 M
Special Food Services, Catering	\$23.27 M
Drinking Places	\$16.38 M
Motor Vehicle, Parts Dealers	\$252.05 M
New Car Dealers	\$145.33 M
Used Car Dealers	\$13.45 M
Recreational Vehicle Dealers	\$25.86 M
Motorcycle, Boat Dealers	\$34.19 M
Auto Parts, Accessories	\$21.29 M
Tire Dealers	\$11.93 M

Income Summary

Income Summary Report



Trade Area

Great Falls, Montana

Population

Estimated Population (2025)	149,653	
Projected Population (2030)	146,896	
Census Population (2020)	150,410	
Census Population (2010)	147,456	
Projected Annual Growth (2025 to 2030)	-2,757	-0.4%
Historical Annual Growth (2020 to 2025)	-757	-0.1%
Historical Annual Growth (2010 to 2020)	2,954	0.2%

Households

Estimated Households (2025)	60,828	
Projected Households (2030)	59,923	
Census Households (2020)	60,767	
Census Households (2010)	59,965	
Projected Annual Growth (2025 to 2030)	-904	-0.3%
Historical Annual Growth (2020 to 2025)	61	-
Historical Annual Growth (2010 to 2020)	802	0.1%

Average Household Income

Estimated Average Household Income (2025)	\$88,224	
Projected Average Household Income (2030)	\$87,119	
Census Average Household Income (2020)	\$52,200	
Census Average Household Income (2010)	\$40,085	
Projected Annual Growth (2025 to 2030)	-\$1,105	-0.3%
Historical Annual Growth (2020 to 2025)	\$36,024	4.6%
Historical Annual Growth (2010 to 2020)	\$12,115	3.0%

Median Household Income

Estimated Median Household Income (2025)	\$67,556	
Projected Median Household Income (2030)	\$66,952	
Census Median Household Income (2020)	\$42,565	
Census Median Household Income (2010)	\$32,222	
Projected Annual Growth (2025 to 2030)	-\$604	-0.2%
Historical Annual Growth (2020 to 2025)	\$24,991	3.9%
Historical Annual Growth (2010 to 2020)	\$10,344	3.2%

Per Capita Income

Estimated Per Capita Income (2025)	\$36,430	
Projected Per Capita Income (2030)	\$36,120	
Census Per Capita Income (2020)	\$21,227	
Census Per Capita Income (2010)	\$15,882	
Projected Annual Growth (2025 to 2030)	-\$310	-0.2%
Historical Annual Growth (2020 to 2025)	\$15,203	4.8%
Historical Annual Growth (2010 to 2020)	\$5,345	3.4%

Other Income

Estimated Families (2025)	35,597	
Estimated Average Family Income (2025)	\$112,251	
Estimated Median Family Income (2025)	\$85,702	
Estimated Average Household Net Worth (2025)	\$873,560	

Consumer Expenditure Summary

Consumer Expenditure Summary



Trade Area		
Great Falls, Montana		
Estimated Population		149,653
Estimated Households		60,828
Household Expenditure		\$5.41 B
Per Household ~ Per Capita	\$88,957	\$36,157
Non-Retail Expenditures	\$2.58 B	47.8%
Per Household ~ Per Capita	\$42,491	\$17,271
Retail Expenditures	\$2.83 B	52.2%
Per Household ~ Per Capita	\$46,465	\$18,886
Alcoholic Beverages	\$32.76 M	0.6%
Per Household ~ Per Capita	\$539	\$219
Apparel	\$99.91 M	1.8%
Per Household ~ Per Capita	\$1,642	\$668
Contributions	\$167.09 M	3.1%
Per Household ~ Per Capita	\$2,747	\$1,117
Education	\$120.13 M	2.2%
Per Household ~ Per Capita	\$1,975	\$803
Entertainment	\$310.03 M	5.7%
Per Household ~ Per Capita	\$5,097	\$2,072
Food Away From Home	\$237.05 M	4.4%
Per Household ~ Per Capita	\$3,897	\$1,584
Grocery	\$369.86 M	6.8%
Per Household ~ Per Capita	\$6,080	\$2,471
Health Care	\$398.73 M	7.4%
Per Household ~ Per Capita	\$6,555	\$2,664
Household Furnishings and Equipment	\$142.85 M	2.6%
Per Household ~ Per Capita	\$2,349	\$955
Household Operations	\$101.09 M	1.9%
Per Household ~ Per Capita	\$1,662	\$675
Miscellaneous Expenses	\$92.45 M	1.7%
Per Household ~ Per Capita	\$1,520	\$618
Personal Care	\$71.77 M	1.3%
Per Household ~ Per Capita	\$1,180	\$480
Shelter	\$874.5 M	16.2%
Per Household ~ Per Capita	\$14,377	\$5,844
Tax and Retirement	\$1.16 B	21.3%
Per Household ~ Per Capita	\$18,989	\$7,718
Tobacco and Related	\$29.8 M	0.6%
Per Household ~ Per Capita	\$490	\$199
Transportation	\$943.15 M	17.4%
Per Household ~ Per Capita	\$15,505	\$6,302
Utilities	\$264.81 M	4.9%
Per Household ~ Per Capita	\$4,353	\$1,769

Consumer Expenditure Trend



Trade Area

Great Falls, Montana

Population / Households (2025)

Estimated Population	149,653
Estimated Households	60,828

Total Annual Consumer Expenditure (2025)

Total Household Expenditure	\$5.41 B
Total Non-Retail Expenditure	\$2.58 B
Total Retail Expenditure	\$2.83 B
Alcoholic Beverages	\$32.76 M
Apparel	\$99.91 M
Contributions	\$167.09 M
Education	\$120.13 M
Entertainment	\$310.03 M
Food Away From Home	\$237.05 M
Grocery	\$369.86 M
Health Care	\$398.73 M
Household Furnishings and Equipment	\$142.85 M
Household Operations	\$101.09 M
Miscellaneous Expenses	\$92.45 M
Personal Care	\$71.77 M
Shelter	\$874.5 M
Tax and Retirement	\$1.16 B
Tobacco and Related	\$29.8 M
Transportation	\$943.15 M
Utilities	\$264.81 M

Monthly Household Consumer Expenditure (2025)

Total Household Expenditure	\$7,413	
Total Non-Retail Expenditure	\$3,541	47.8%
Total Retail Expenditure	\$3,872	52.2%
Alcoholic Beverages	\$45	0.6%
Apparel	\$137	1.8%
Contributions	\$229	3.1%
Education	\$165	2.2%
Entertainment	\$425	5.7%
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Household Operations	\$138	1.9%
Miscellaneous Expenses	\$127	1.7%
Personal Care	\$98	1.3%
Shelter	\$1,198	16.2%
Tax and Retirement	\$1,582	21.3%
Tobacco and Related	\$41	0.6%
Transportation	\$1,292	17.4%
Utilities	\$363	4.9%

Consumer Expenditure Trend



Trade Area

Great Falls, Montana

Population / Households (2030)

Projected Population	146,896
Projected Households	-

Total Annual Consumer Expenditure (2030)

Total Household Expenditure	\$5.21 B
Total Non-Retail Expenditure	\$2.49 B
Total Retail Expenditure	\$2.72 B
Alcoholic Beverages	\$31.48 M
Apparel	\$96.06 M
Contributions	\$160.46 M
Education	\$115.4 M
Entertainment	\$298.11 M
Food Away From Home	\$227.88 M
Grocery	\$356.14 M
Health Care	\$388.12 M
Household Furnishings and Equipment	\$137.31 M
Household Operations	\$97.24 M
Miscellaneous Expenses	\$88.86 M
Personal Care	\$69.08 M
Shelter	\$842.1 M
Tax and Retirement	\$1.11 B
Tobacco and Related	\$28.78 M
Transportation	\$907.68 M
Utilities	\$255.02 M

Consumer Expenditure Growth (2025 to 2030)

Total Household Expenditure	\$-202.16 M
Total Non-Retail Expenditure	\$-97.54 M
Total Retail Expenditure	\$-104.62 M
Alcoholic Beverages	\$-1.27 M
Apparel	\$-3.84 M
Contributions	\$-6.63 M
Education	\$-4.73 M
Entertainment	\$-11.92 M
Food Away From Home	\$-9.16 M
Grocery	\$-13.72 M
Health Care	\$-10.6 M
Household Furnishings and Equipment	\$-5.54 M
Household Operations	\$-3.84 M
Miscellaneous Expenses	\$-3.59 M
Personal Care	\$-2.69 M
Shelter	\$-32.4 M
Tax and Retirement	\$-45.95 M
Tobacco and Related	\$-1.02 M
Transportation	\$-35.46 M
Utilities	\$-9.79 M

Crime Risk

Crime Risk Profile



Trade Area

Great Falls, Montana

Demographics

Population	149,653
Census Population	150,410
Households	60,828
Average Household Income	\$88,224
Median Household Income	\$67,556
Per Capita Income	\$36,430

Total Crime

Crime Index	135
Crime Level	Above Average

Personal Crime

Crime Index	136
Crime Level	Above Average

Murder

Crime Index	61
Crime Level	Below Average

Rape

Crime Index	218
Crime Level	Very High

Robbery

Crime Index	28
Crime Level	Very Low

Assault

Crime Index	157
Crime Level	High Risk

Property Crime

Crime Index	134
Crime Level	Above Average

Burglary

Crime Index	89
Crime Level	Below Average

Larceny

Crime Index	153
Crime Level	High Risk

Motor Vehicle Theft

Crime Index	85
Crime Level	Below Average

* Crime Index: 100 = National Average Adjusted for Population