Glendive

A Guide for Prospective Franchise Restaurant Investors

DAWSON COUNTY
ECONOMIC
DEVELOPMENT
COUNCIL

Glendive Community Introduction

Nestled along the iconic Yellowstone River amidst a sprawling sea of jagged badlands and rolling prairies under the Big Sky, Glendive, Montana's "Gate City" and the "Paddlefish Capital of the World," is the county seat of Dawson County (pop. 9,431 per most recent Census estimates) and the first community of any size visitors entering Montana from the east arrive to, conveniently located along Interstate 94. Glendive is home to about 7,300 residents including the unincorporated residential subdivisions adjacent to the city on the west bank of the Yellowstone River. A few more important facts about Glendive:

• Don't be fooled by the Census data! Official Census data for Glendive leaves out the unincorporated subdivisions of West Glendive, giving a false impression of the community's true permanent population. When the populations of Glendive/West Glendive are combined, the city ranks in the top 15 of Montana city sizes. Many Montana cities and towns smaller than that, even some that are far-removed from any interstate connection or lack any visitor destination/attraction, have multiple fast-food franchise restaurants, while Glendive is the largest city in the state to have virtually none.

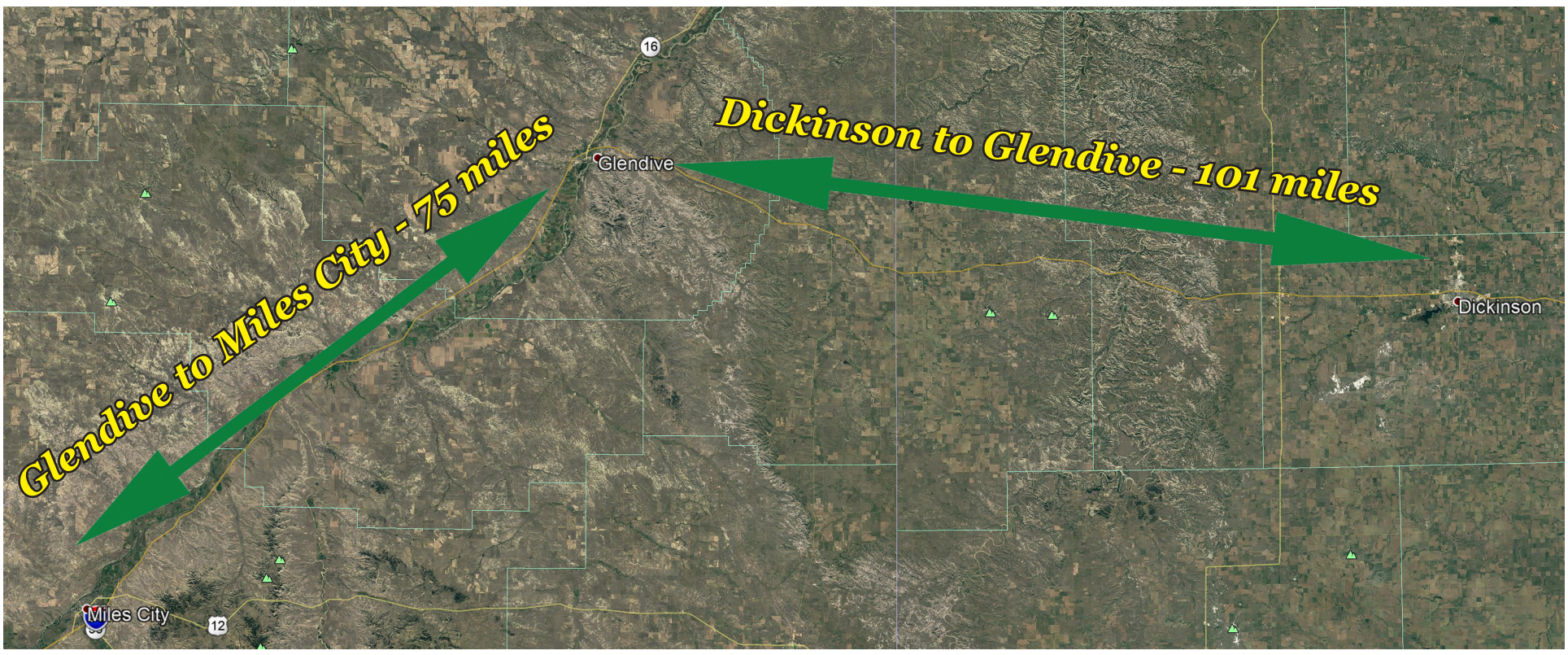
• Glendive is home to Dawson Community College, with a full-time enrollment of approximately 350 students. DCC competes athletically in Region 13 of the NJCAA, bringing frequent collegiate athletic competitions and tournaments to Glendive.

The badlands of Makoshika State Park bring in tens of thousands of tourists to Glendive annually, with almost 128,000 visiting the park in 2020.

• Glendive is a tourist destination. We are home to Makoshika State Park, Montana's largest state park and voted the #1 travel attraction in the state by USA Today in 2017. Visitation and overnight camping in Makoshika have risen consistently each year over the past five years, with nearly 128,000 visitors tallied in 2020 and overnight camping increasing by 40 percent over the previous year. Makoshika and the surrounding badlands are also a major draw for dinosaur enthusiasts, as the area is chock-full of dinosaur fossils and other fossilized remains. Glendive has two stops on the official Montana Dinosaur Trail, the Makoshika visitor center and the Frontier Gateway Museum.

Besides Makoshika, there are several annual events which also draw large numbers of visitors to Glendive throughout the year. The event season kicks off with the annual Glendive Agriculture and Trade Expo (GATE) in February. The Makoshika Youth Basketball Tournament in March brings in dozens of traveling youth teams from all around the region. The annual May paddlefish season draws visitors from all over the country seeking to snag one of the unusual fish. June is an especially busy month, with the annual Buzzard Day celebration and 10K/5K run in Makoshika and the annual Miss Montana Pageant. More visitors come to town in the fall for the annual Harvestfest/Junkapalooza, Zonta crafts show and several other holiday season events.

• Glendive is a major Montana tourist/transportation crossroads. With our location on I-94, the majority of visitors to Montana driving in from



Glendive is nearly equidistant to Dickinson, ND, and Miles City, MT, the next closest cities on I-94 with fast food restaurants. With Glendive's present lack of fast food options, there is currently a 176-mile gap along I-94 between fast food restaurant options for interstate travelers.

the east pass through Glendive on their way into and out of Montana, and especially during the busy summer tourist season, Glendive's gas stations and hotels are packed with vehicles from states in the Midwest. To accommodate all the busy tourist traffic, the city boasts several major hotel chains with nearly 500 rooms total available. I-94 conveys those visitors on to points westward, primarily to Yellowstone National Park. For those tourists from the east headed to Glacier National Park, many of them exit at Glendive onto Highway 200S, which provides the most direct eastern route to Glacier. Montana Highway 16, which terminates at I-94 in Glendive, is another major tourist route, connecting to Regina, Saskatchewan, and bringing significant numbers of visitors from Canada to Montana and other points south like the Black Hills via Glendive. Taken altogether, Glendive can lay a better claim than almost anywhere else in Montana to being a "tourist crossroads." And while hotel and gas station chains have taken advantage of this opportunity, with several brand new operations of each opening up in Glendive in recent years, in defiance of all logic, fast food franchises have not.

• At present, there is virtually no market competition in Glendive for fast food customers. Glendive does not currently have a single traditional "burgers-and-fries" fast food restaurant. The only national restaurant franchises presently operating in Glendive are Subway and Pizza Hut, and there are no other restaurants operating in Glendive which would meet the traditional definition of "fast food."

Students and community members root for their favorite shipmates at Dawson Community College's Buccaneer Regatta on Hollecker Lake.

Our Community by the Numbers

Below is a graphic representation of Dawson County's population and household income from the Montana Governor's Office on Economic Development.

To note again, we are choosing to use the profile for the entire county rather than the one for the City of Glendive because the census data fails to capture the West Glendive population, and only a small percentage of the county's residents live outside of Glendive/West Glendive.

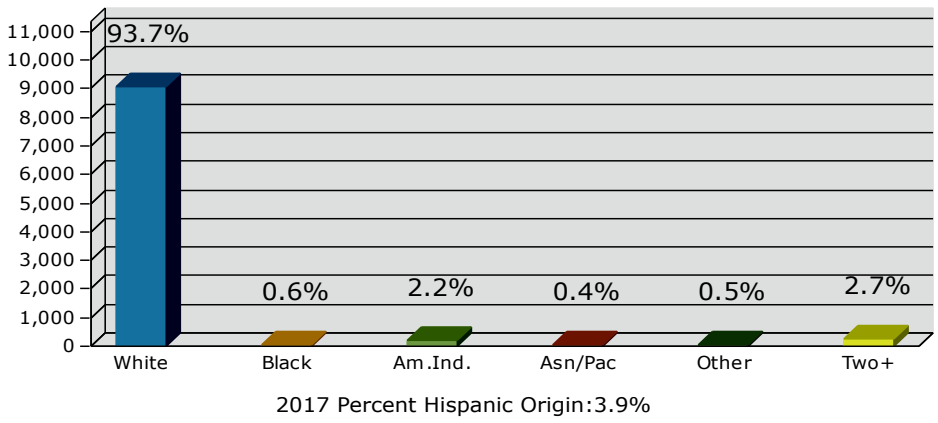
As you should note, both population and household income are forecast to rise over the next five years, which should create ever greater local demand for food services. It is also worth noting again that any renewed oilfield activity would likely result in a small to moderate spike in these projections.

Governor's Office of Economic Development
(406) 444-5634

Graphic Profile

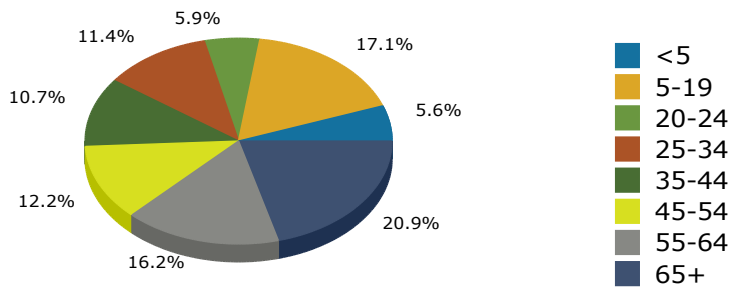
Dawson County, MT (30021)
Geography: County

2017 Population by Race

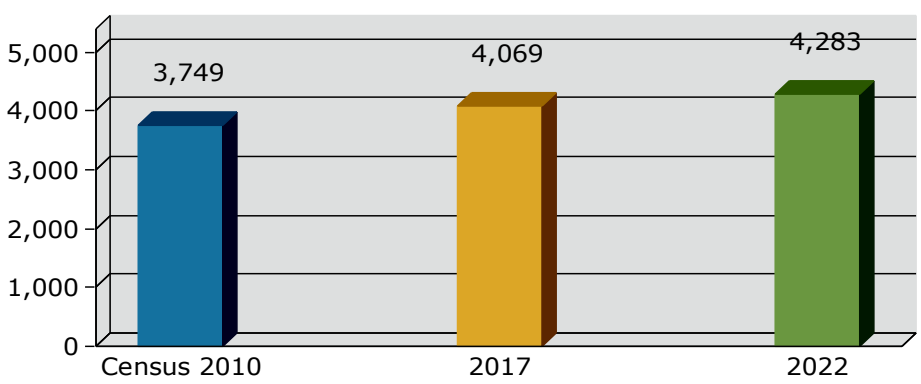


2017 Percent Hispanic Origin:3.9%

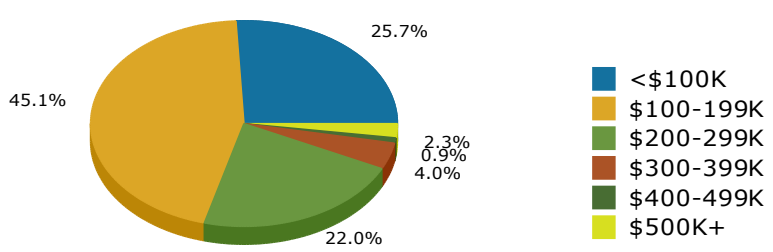
2017 Population by Age



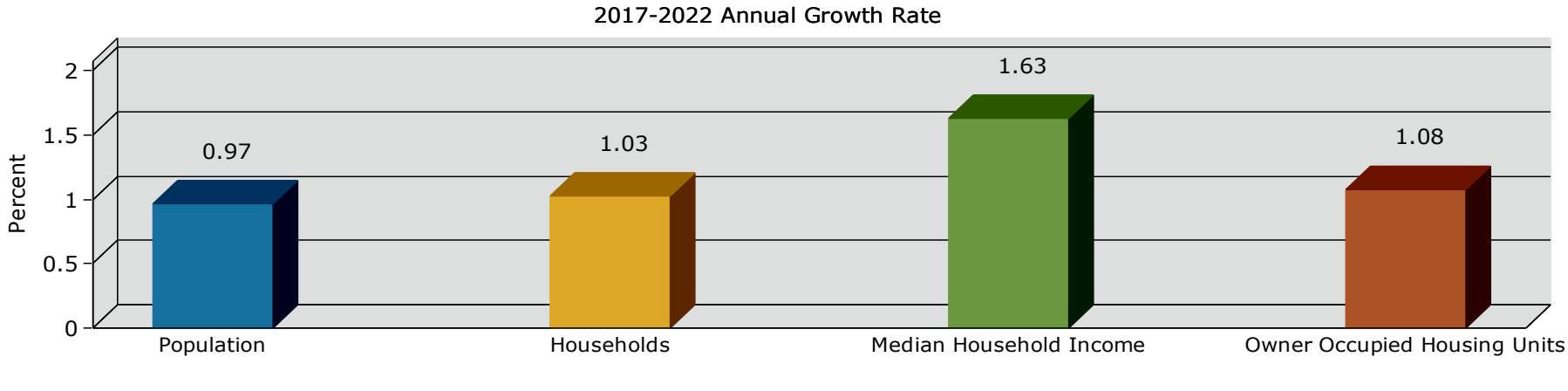
Households



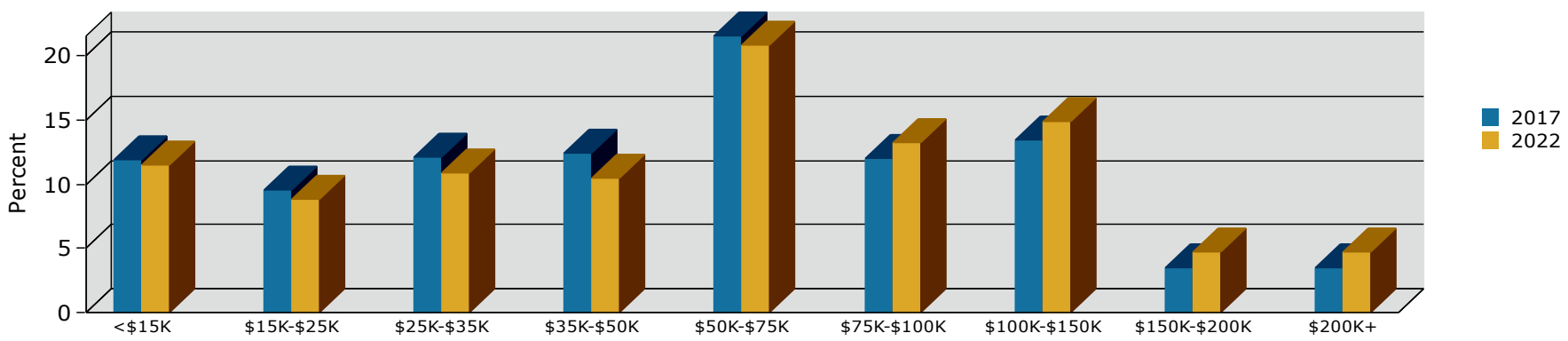
2017 Home Value



2017-2022 Annual Growth Rate



Household Income



Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022.

May 18, 2018

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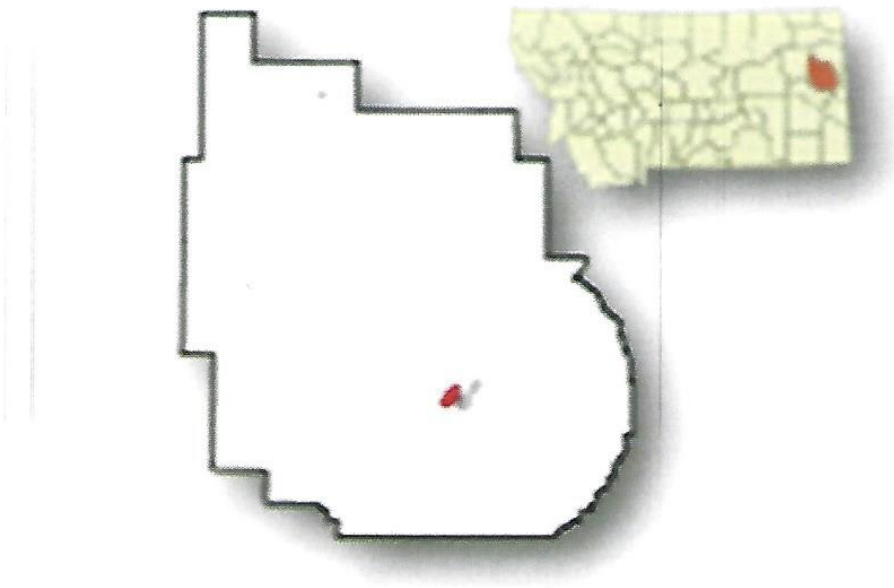
Our Community by the Numbers

The table below shows the combined population of Glendive/West Glendive in relation to other Montana cities, based on the most recently available Census estimates.

As you can see, when the population of West Glendive is included with Glendive, we rank amongst the largest communities in Montana. It should also be noted that every single one of the cities in the right-hand column, including the six with a population below Glendive/West Glendive, are home to multiple major fast food franchise restaurants — every one except Glendive, which has none.

DAWSON COUNTY POPULATION AND POPULATION COMPARISION



POPULATION*

City of Glendive	= 5,353
West Glendive	= 1,922
Total Dawson County	= 9,431

Combined Population of West Glendive and City of Glendive = ***7,275***

* Population data from Montana Department of Commence CECI report 2016

POPULATION COMPARISON**

Baker	= 1,990	Havre	= 9,846
Townsend	= 1,978	Miles City	= 8,647
Stevensville	= 1,963	Belgrade	= 8,254
Malta	= 1,950	Livingston	= 7,401
Three Forks	= 1,944	Whitefish	= 7,279
West Glendive	***= 1,922***	***Glendive Combo***	***= 7,275***
Plentywood	= 1,904	Laurel	= 6,865
Forsyth	= 1,869	Sidney	= 6,566
Roundup	= 1,840	Lewistown	= 5,870
Big Timber	= 1,645	Columbia Falls	= 5,241
Fort Benton	= 1,459	Hamilton	= 4,674
Chinook	= 1,233	Dillion	= 4,257

** Population comparison data from MSU Extension Local Government Profiles Fiscal Year 2016

Our Community by the Numbers

Below is a report on our community's Restaurant Market Potential from the Montana Governor's Office on Economic Development.

What should be of note to you here as you look toward the bottom of this report is that despite not having a traditional fast food restuarant in Glendive, our residents go to and spend money at fast food restaurants at levels that generally exceed the Market Potential Index national average, which is indiciative of the pent-up demand amongst our residents for fast food services.

Anecdotally, if you speak to any Glendive resident who's about to head out of town to a city with fast food restaurants, you will invariably hear them speak at some point with some level of excitement about what fast food options they plan to indulge in while on their trip.

Bottom line, there is no shortage of local demand, to say nothing of interstate traffic and tourists/visitors.

Governor's Office
of Economic
Development
(406) 444-5634

Restaurant Market Potential

Dawson County, MT (30021)
Geography: County

Demographic Summary	2017	2022
Population	9,685	10,166
Population 18+	7,751	8,084
Households	4,069	4,283
Median Household Income	$53,111	$57,591

Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Went to family restaurant/steak house in last 6 mo	5,864	75.7%	101
Went to family restaurant/steak house 4+ times/mo	2,163	27.9%	102
Spent at family rest/steak hse last 6 months: <$31	770	9.9%	130
Spent at family rest/steak hse last 6 months: $31-50	735	9.5%	110
Spent at family rest/steak hse last 6 months: $51-100	1,257	16.2%	109
Spent at family rest/steak hse last 6 months: $101-200	689	8.9%	80
Spent at family rest/steak hse last 6 months: $201-300	328	4.2%	89
Spent at family rest/steak hse last 6 months: $301+	375	4.8%	79
Family restaurant/steak house last 6 months: breakfast	1,040	13.4%	106
Family restaurant/steak house last 6 months: lunch	1,744	22.5%	118
Family restaurant/steak house last 6 months: dinner	3,631	46.8%	101
Family restaurant/steak house last 6 months: snack	151	1.9%	102
Family restaurant/steak house last 6 months: weekday	2,319	29.9%	97
Family restaurant/steak house last 6 months: weekend	3,153	40.7%	98
Fam rest/steak hse/6 months: Applebee`s	1,846	23.8%	105
Fam rest/steak hse/6 months: Bob Evans Farms	487	6.3%	170
Fam rest/steak hse/6 months: Buffalo Wild Wings	827	10.7%	111
Fam rest/steak hse/6 months: California Pizza Kitchen	107	1.4%	43
Fam rest/steak hse/6 months: Carrabba`s Italian Grill	179	2.3%	70
Fam rest/steak hse/6 months: The Cheesecake Factory	225	2.9%	46
Fam rest/steak hse/6 months: Chili`s Grill & Bar	723	9.3%	84
Fam rest/steak hse/6 months: CiCi`s Pizza	364	4.7%	119
Fam rest/steak hse/6 months: Cracker Barrel	848	10.9%	105
Fam rest/steak hse/6 months: Denny`s	724	9.3%	105
Fam rest/steak hse/6 months: Golden Corral	795	10.3%	136
Fam rest/steak hse/6 months: IHOP	577	7.4%	71
Fam rest/steak hse/6 months: Logan`s Roadhouse	460	5.9%	159
Fam rest/steak hse/6 months: LongHorn Steakhouse	399	5.1%	105
Fam rest/steak hse/6 months: Olive Garden	1,244	16.0%	94
Fam rest/steak hse/6 months: Outback Steakhouse	530	6.8%	75
Fam rest/steak hse/6 months: Red Lobster	1,060	13.7%	119
Fam rest/steak hse/6 months: Red Robin	319	4.1%	63
Fam rest/steak hse/6 months: Ruby Tuesday	417	5.4%	93
Fam rest/steak hse/6 months: Texas Roadhouse	692	8.9%	111
Fam rest/steak hse/6 months: T.G.I. Friday`s	404	5.2%	75
Fam rest/steak hse/6 months: Waffle House	408	5.3%	96
Went to fast food/drive-in restaurant in last 6 mo	7,057	91.0%	101
Went to fast food/drive-in restaurant 9+ times/mo	2,875	37.1%	94
Spent at fast food/drive-in last 6 months: <$11	445	5.7%	127
Spent at fast food/drive-in last 6 months: $11-$20	602	7.8%	93
Spent at fast food/drive-in last 6 months: $21-$40	1,045	13.5%	108
Spent at fast food/drive-in last 6 months: $41-$50	685	8.8%	114
Spent at fast food/drive-in last 6 months: $51-$100	1,426	18.4%	110
Spent at fast food/drive-in last 6 months: $101-$200	877	11.3%	103
Spent at fast food/drive-in last 6 months: $201+	642	8.3%	84

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2017 and 2022.

May 18, 2018

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We Welcome You to Glendive/Dawson County!

We hope this guide has been helpful and we sincerely hope you will give Glendive careful consideration as a site for present or future expansion of your restaurant franchise.

If you would like to arrange for a site visit to Glendive to learn more about us, please let us know, we are happy to accommodate you! The Dawson County Economic Development Council will be happy to cover the cost of your airfare (please note that you can fly direct to Glendive via Cape Air - twice daily flights from Billings to Glendive) and hotel room for your visit and provide you with a tour of our community and potential locations for your restaurant.

To arrange for a visit or to learn more about Glendive and have any questions answered, please contact DCEDC Executive Director Jason Stuart at 406-377-7792 (office), 406-852-4765 (cell) or by email at *dcedc@midrivers.com*.

Above: A brother and sister from Hamilton, MT, celebrate landing their first paddlefish.

Right: Runners take off in the Buzzard Day 10K race.

Youngsters visiting from Minneapolis get a chance to lead around Makoshika mascot "Mak" at Buzzard Day.

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