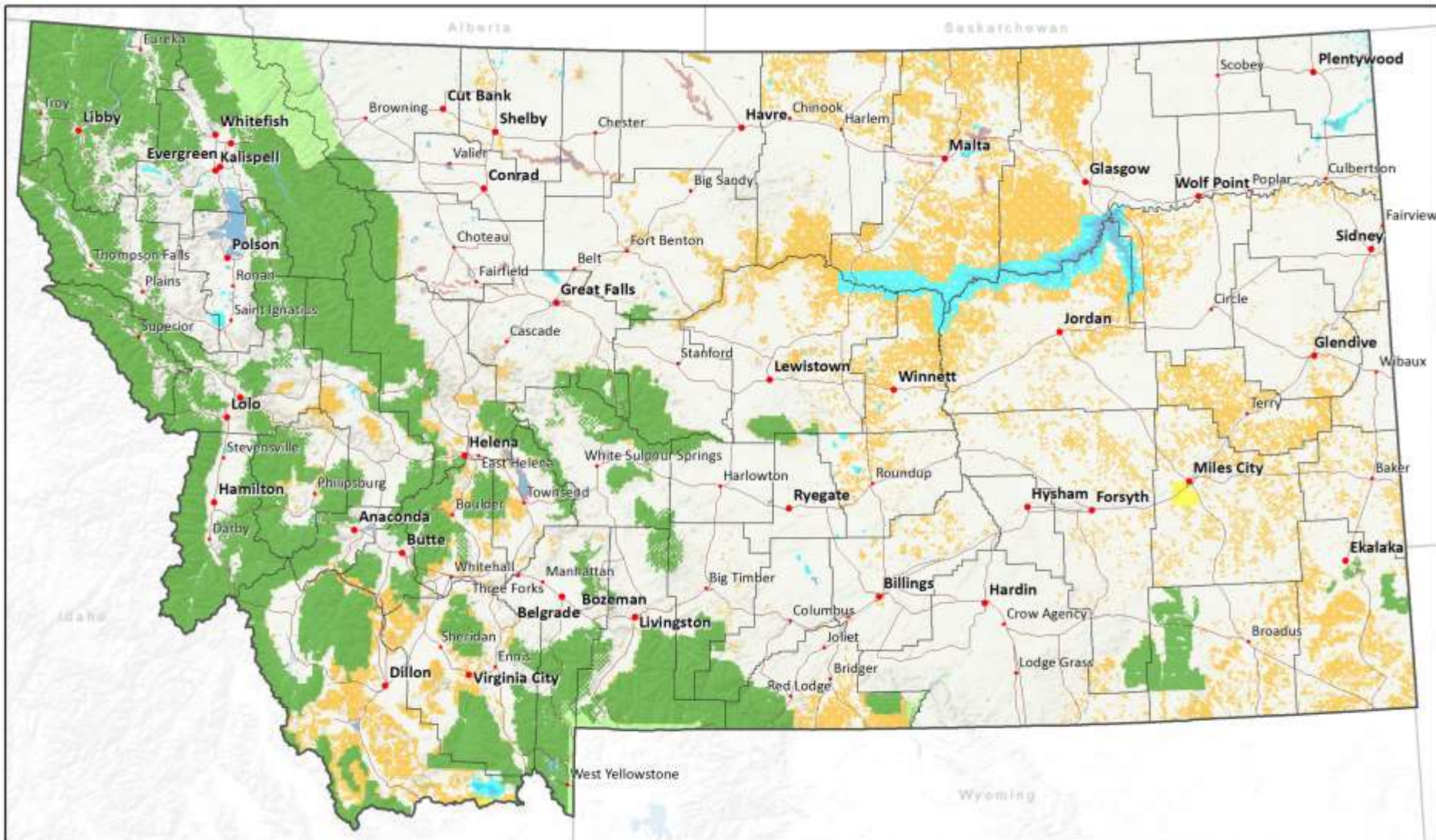


Business for Montana's Outdoors Five-Year Report:

Montana's Public Lands, Jobs, & the Economy





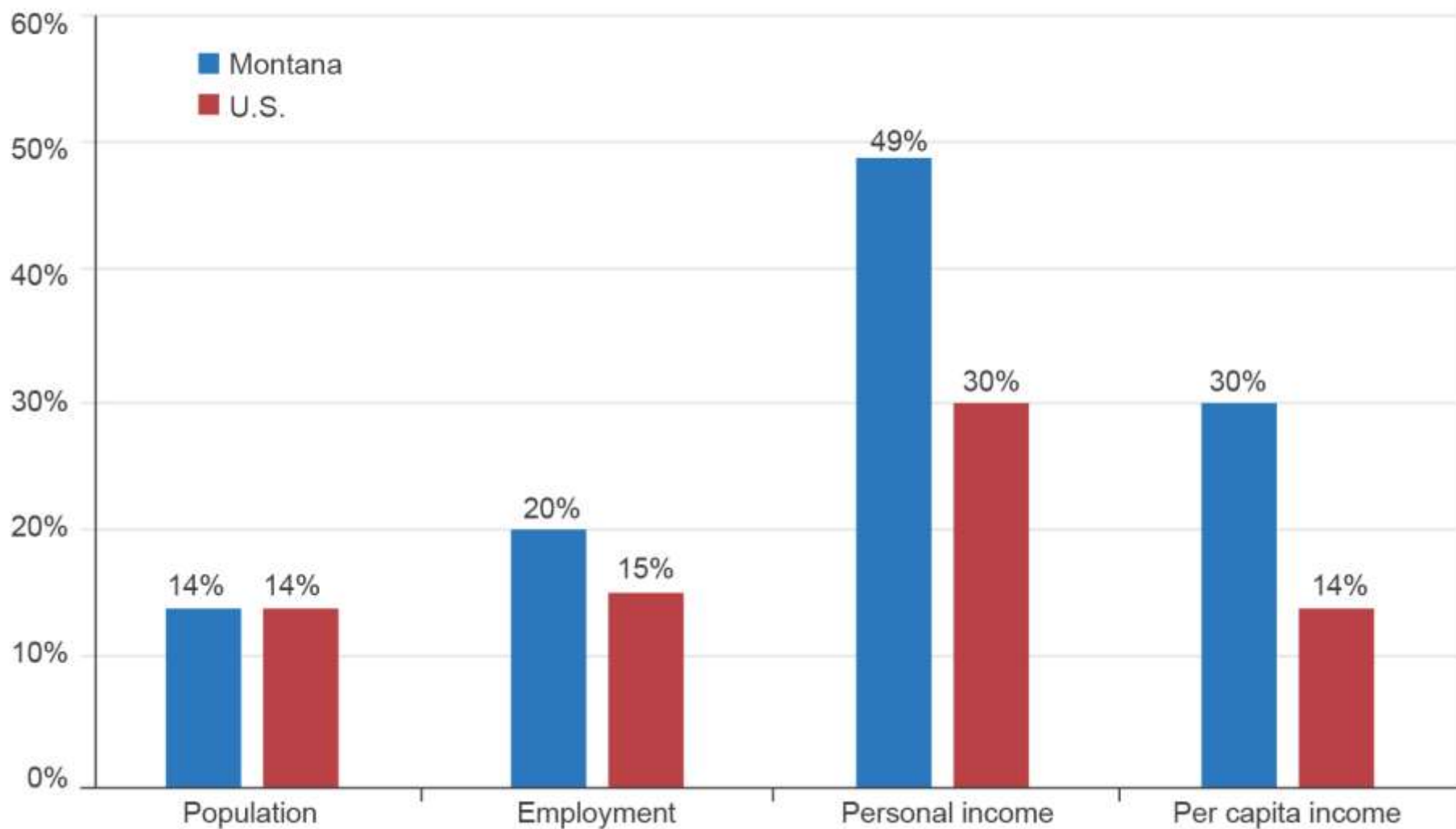
Federally Managed Lands in Montana

- | | | |
|------------------------------|------------------------------|------------------------------|
| US Forest Service | US Fish and Wildlife Service | US Department of Defense |
| US Bureau of Land Management | US Bureau of Reclamation | US Department of Agriculture |
| US National Park Service | US Army Corps of Engineers | |

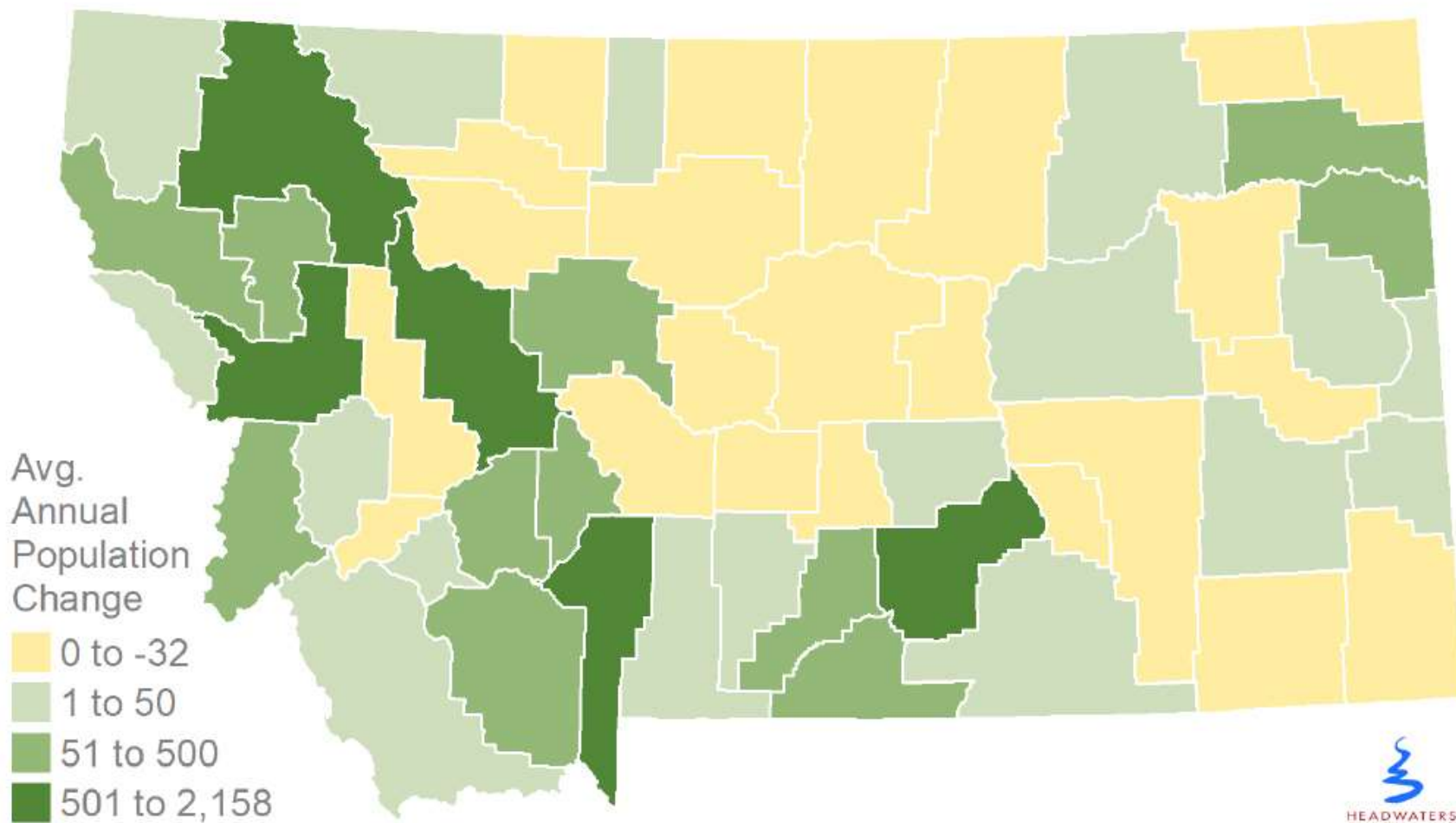
**Outdoor recreation provides
71,000 direct jobs in Montana
and \$7.1 billion in consumer
spending**

That's more jobs than construction
and manufacturing combined

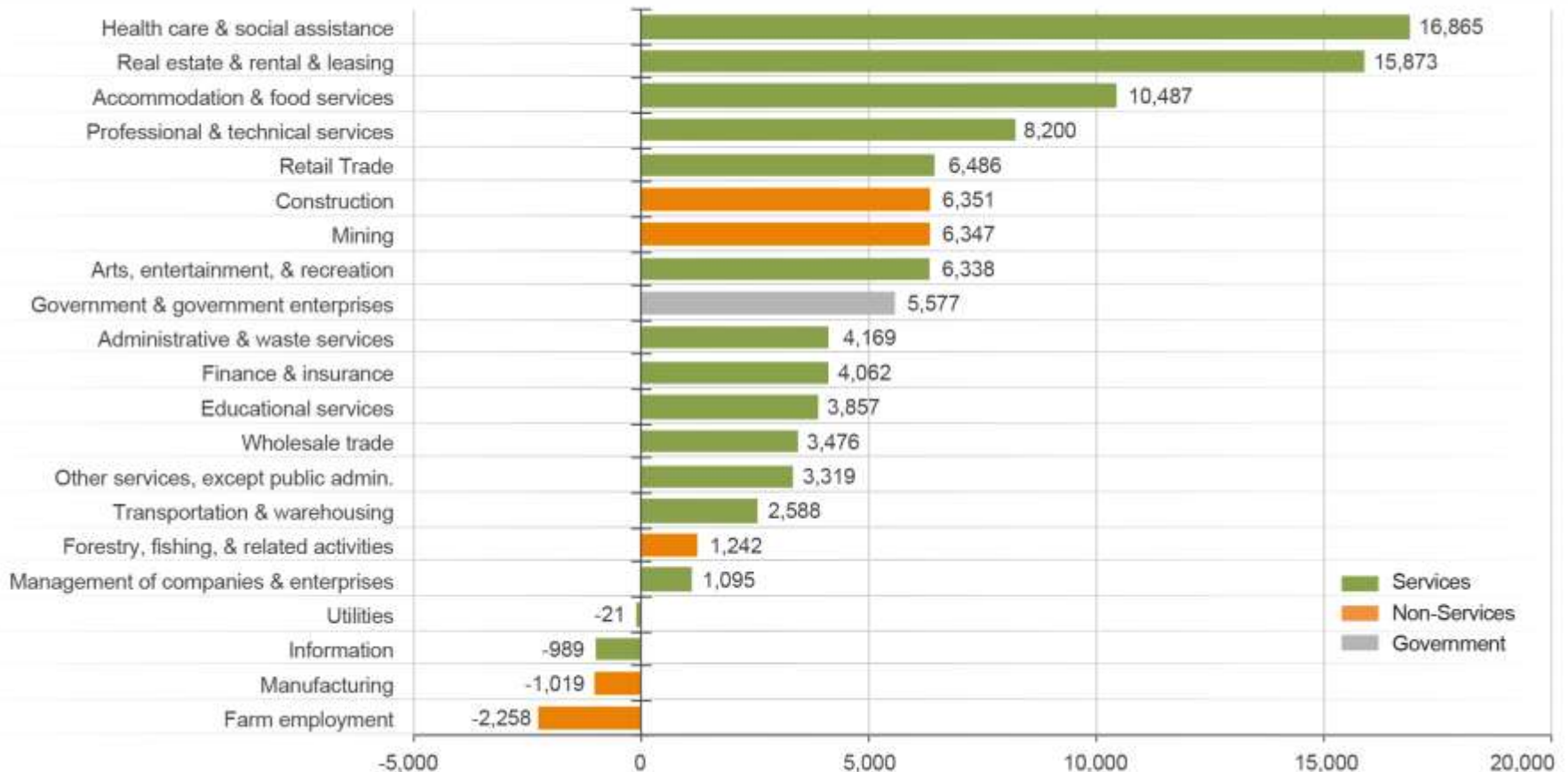
MONTANA VS U.S., PERCENT CHANGE, 2000-2015



TOTAL POPULATION CHANGE BY COUNTY, 2000-2015

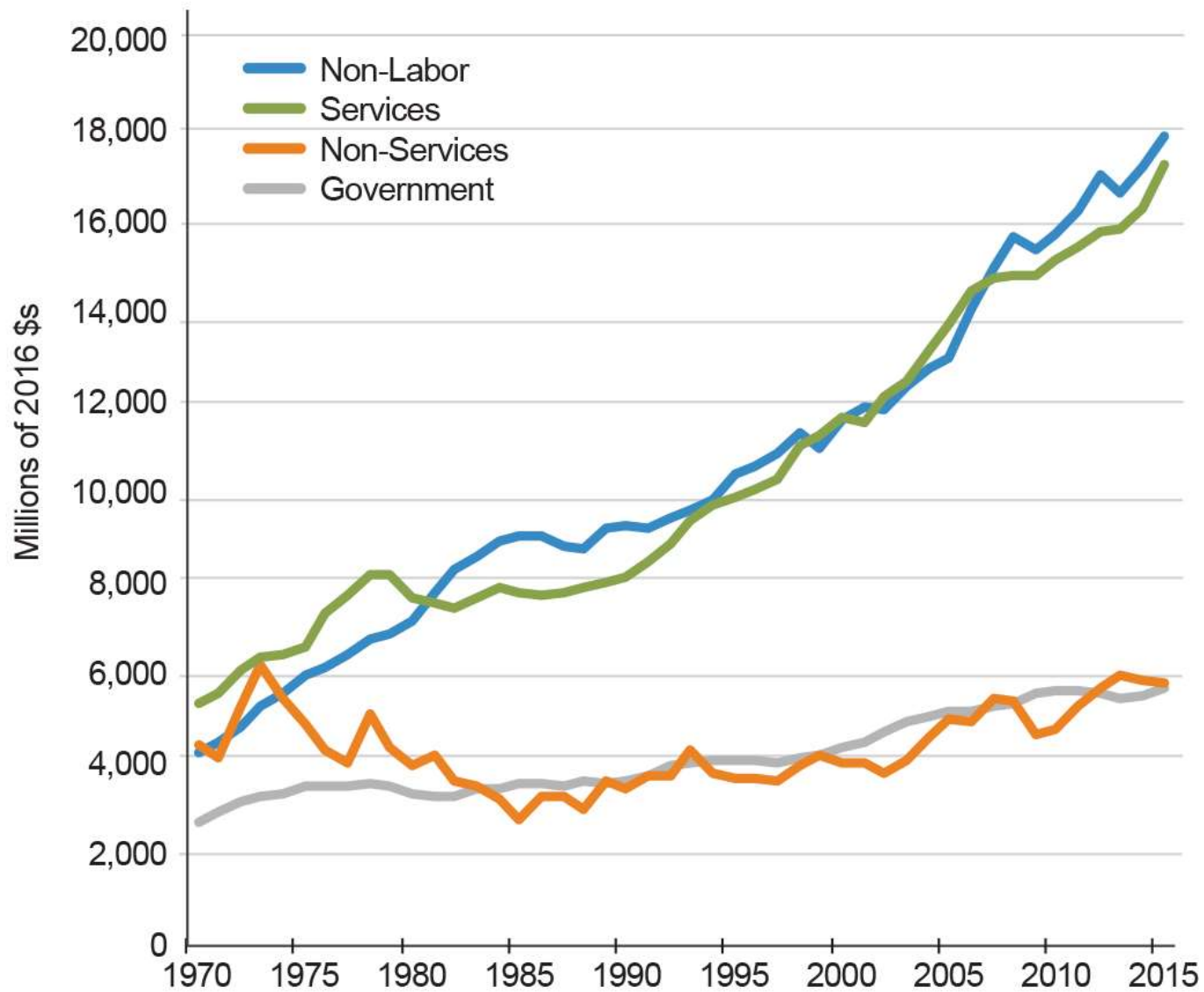


CHANGE IN EMPLOYMENT BY INDUSTRY, MONTANA, 2000-2015

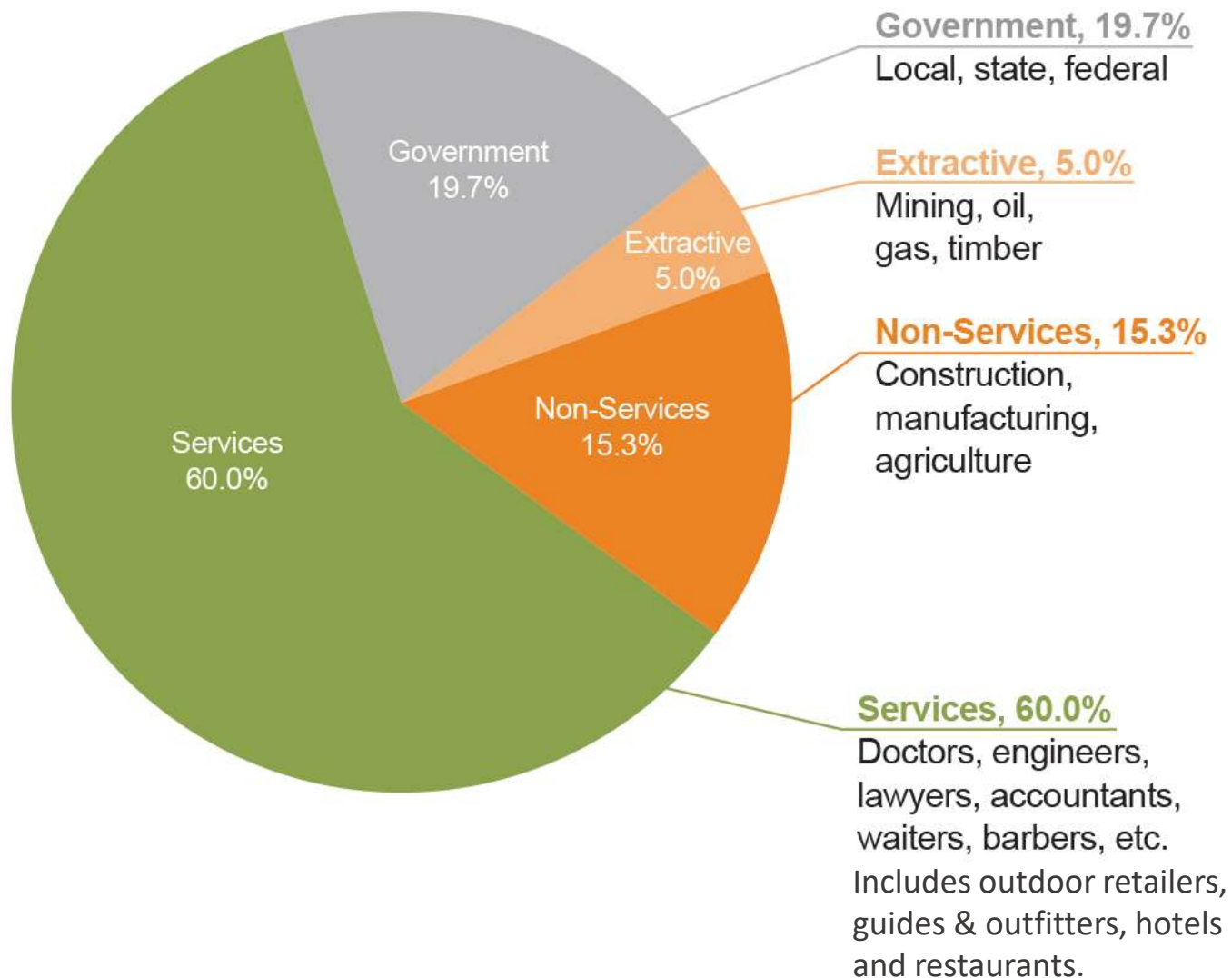


102,000 net new jobs and 85% in SERVICES

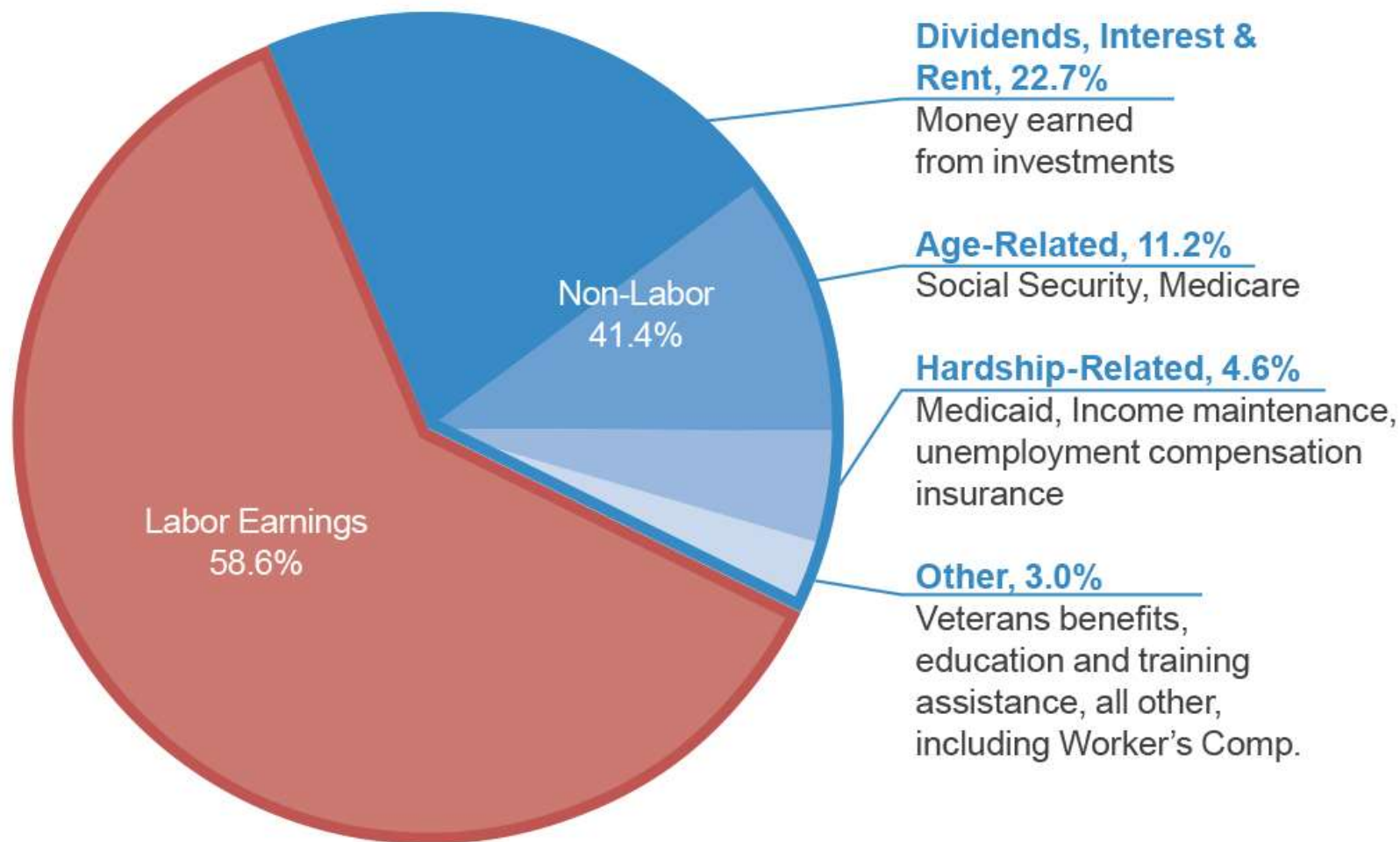
CHANGE IN PERSONAL INCOME BY SOURCE, MONTANA, 1970-2015



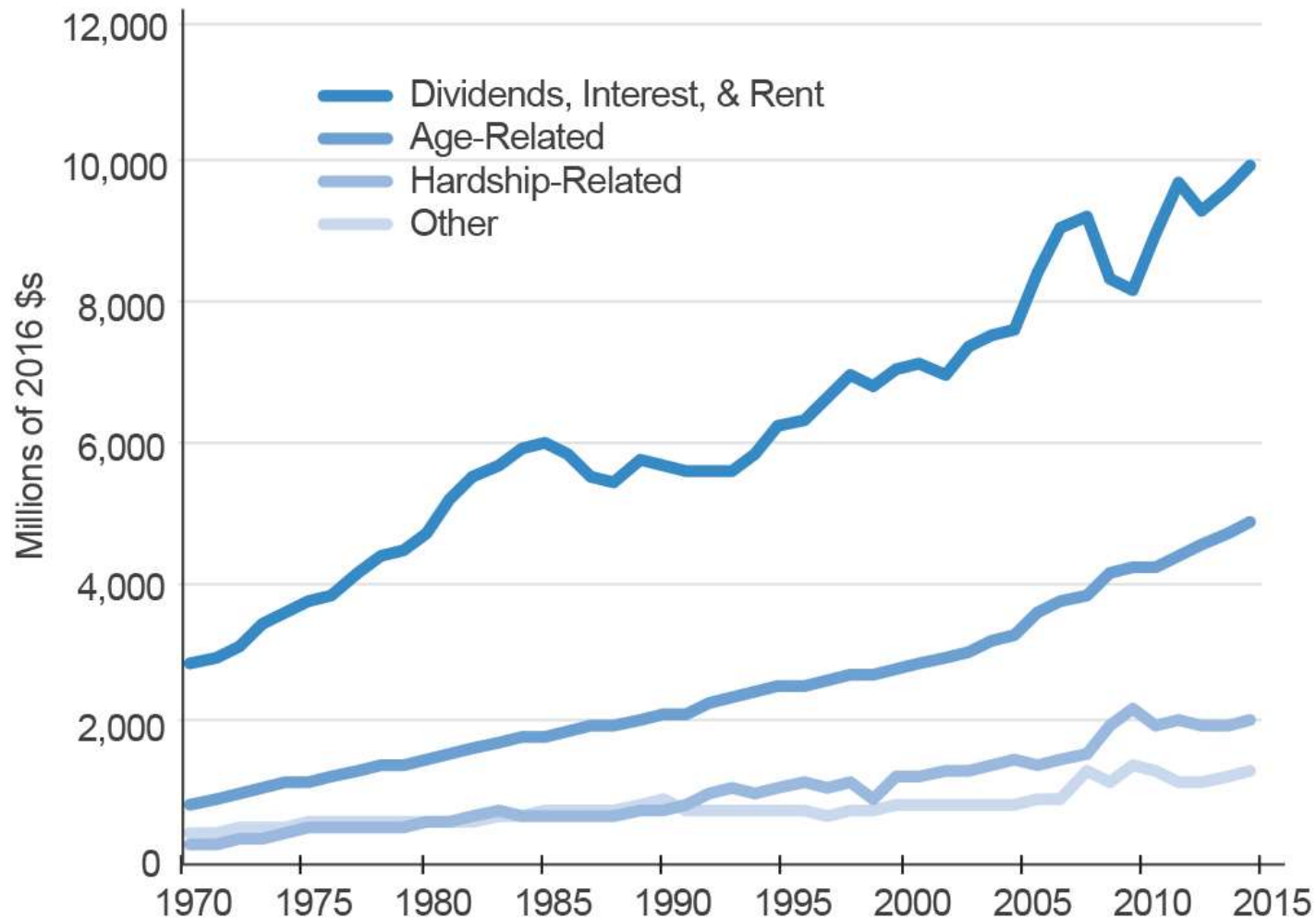
LABOR EARNINGS, MONTANA, 2015



NON-LABOR PERSONAL INCOME AS PERCENT OF TOTAL, MONTANA, 2015



CHANGE IN NON-LABOR INCOME BY SOURCE, MONTANA, 1970-2015



Non-labor income stimulates other sectors, like outdoor recreation, construction, retail, and health services.

5 MONTANA COUNTIES ARE RESPONSIBLE FOR MORE THAN 75% OF JOB GROWTH FROM 2000-2015

JOB GROWTH FOR FIVE FASTEST-GROWING COUNTIES IN MONTANA, 2000-2015

County	New Jobs	% job change	% of net new Montana jobs	Leading job sectors (2015) – In order of importance
Gallatin	27,418	54%	25%	Government, retail trade, accommodation & food, construction, professional & technical services, health care & social assistance
Yellowstone	19,981	23%	18%	Health care & social assistance, retail trade, government, accommodation & food services, construction, professional & technical services
Missoula	14,116	21%	13%	Government, health care & social assistance, retail trade, accommodation & food services, professional & technical services, real estate & rental & leasing
Flathead	14,011	29%	13%	Retail trade, health care & social assistance, accommodation & food services, government, construction, real estate & rental & leasing
Lewis & Clark	8,979	23%	8%	Government, health care & social assistance, retail trade, accommodation & food services, professional & technical services

The role of federal public lands

MONTANA COUNTY MIGRATION AND POPULATION CHANGE, PER 1000 PEOPLE, PER YEAR, 2000-2015

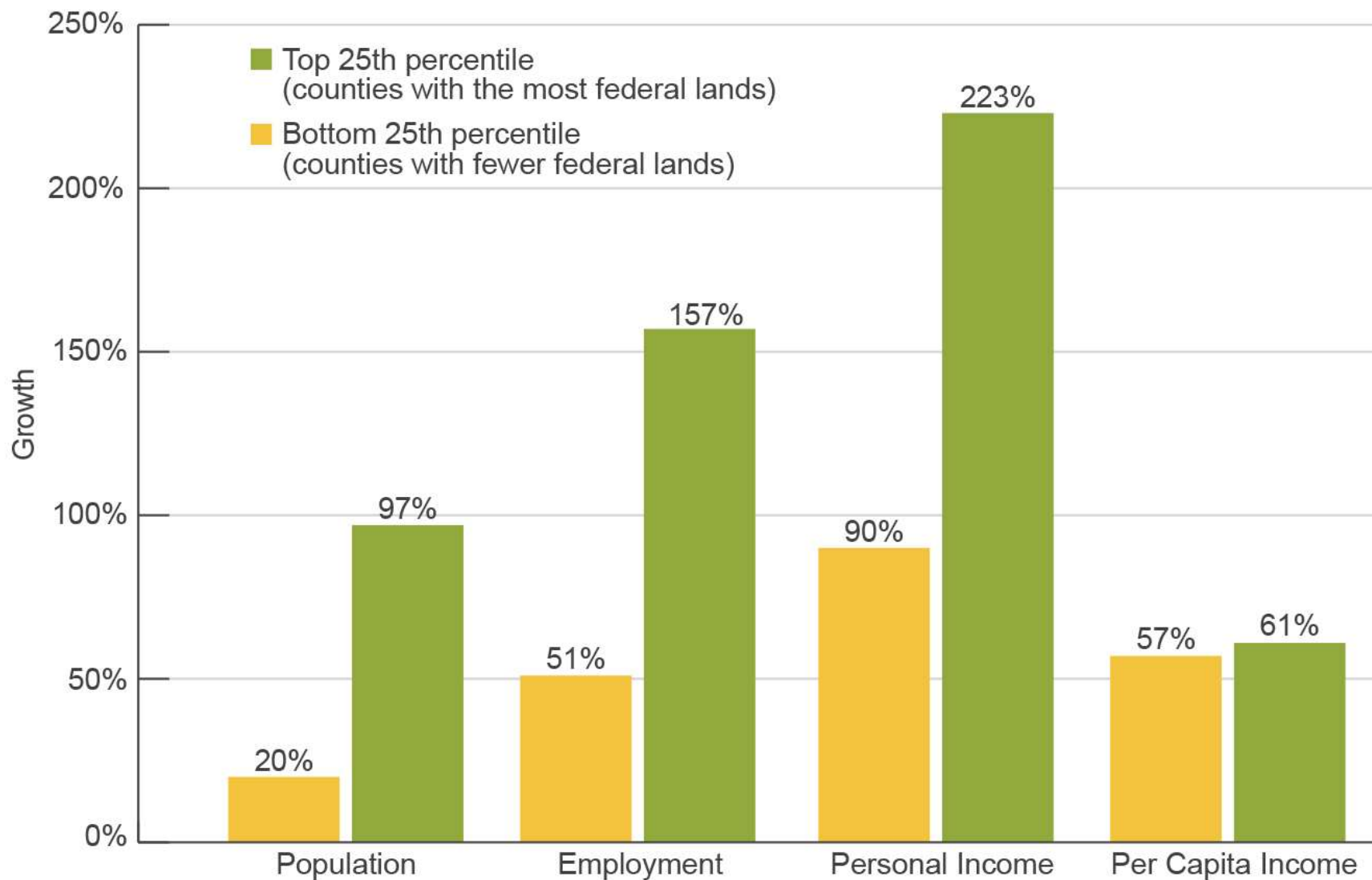
	High proportion federal land	Low proportion federal land
Net migration rate	3.14	-3.47
Population change rate	2.87	-2.22
Employment change rate	9.22	4.64

Proportion means greater than or less than the median share of federal land across all Montana counties.

*“Our quality of life is defined by
our public lands and access to
them. This gives us and other
tech companies in Montana a
distinct competitive advantage.
We can recruit and retain top
talent successfully within and
outside the state because
of the world-class landscape
that surrounds us.”*

*Lance Trebesch, CEO
TicketPrinting.com*

ECONOMIC PERFORMANCE OF RURAL WESTERN COUNTIES WITH FEDERAL LANDS, 1970-2015



The Value of Public Lands

PEOPLE | ECONOMY | ENVIRONMENT

Recreation

Outdoor recreation provides 71,000 direct jobs in Montana and \$7.1 billion in consumer spending.

Heritage

The outdoors define the West, our heritage, culture, and tradition of access to public lands.

Quality of life

Public lands offer Montana a competitive advantage to retain or attract people and businesses.

Commodity production

While employment in timber, mining, oil and gas now account for only five percent of personal income in the rural West, in some communities resource extraction remains important.

Clean water

More than a third of communities' drinking water in the West comes from National Forests.

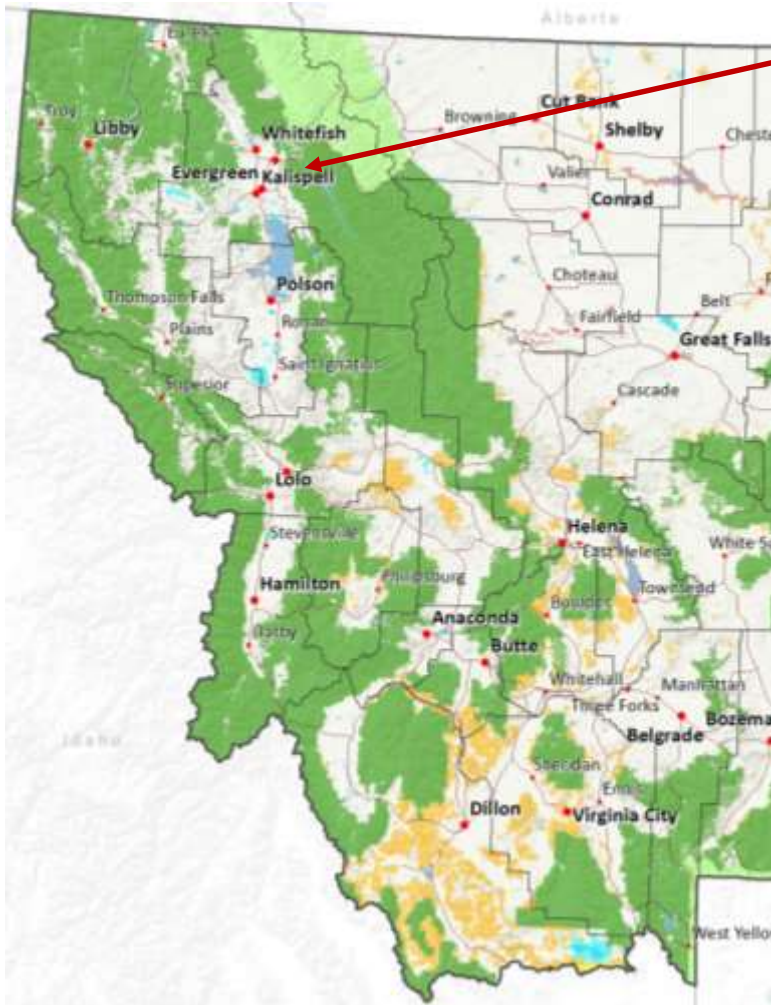
Scenery

Tourists, entrepreneurs, workers, and retirees all are attracted to communities with access to nearby beautiful public lands.

Wildlife

Public lands are essential for healthy wildlife populations like elk, grizzlies, and antelope.





Flathead County

73% federal lands

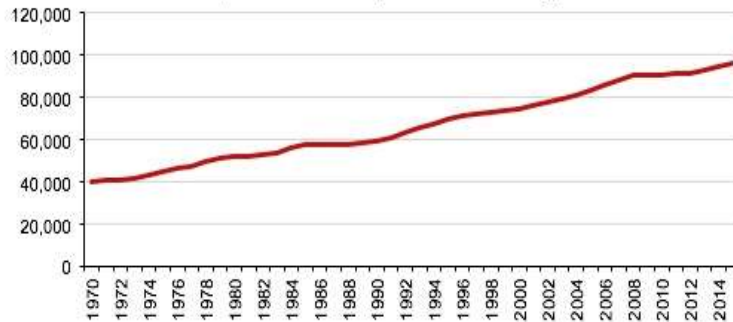
53% Forest Service

19% National Park

Growth 2000-2015

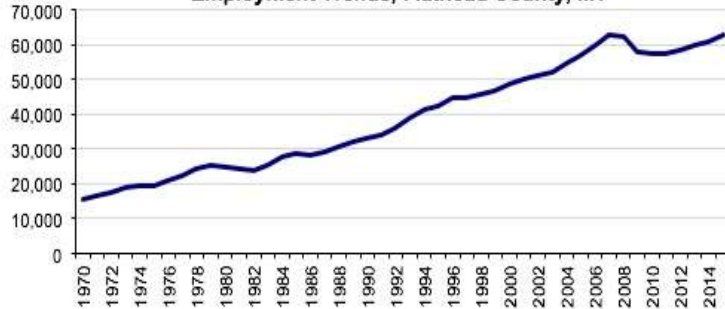
29% Population

Population Trends, Flathead County, MT



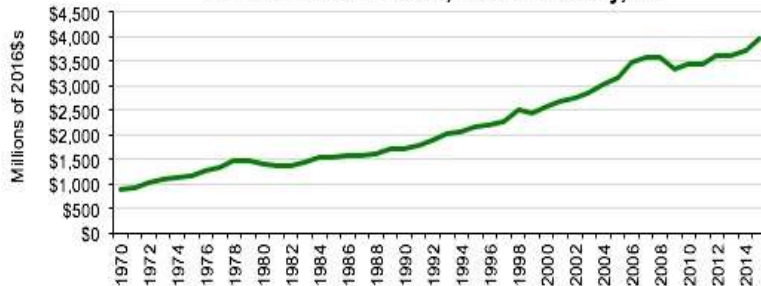
29% Employment

Employment Trends, Flathead County, MT

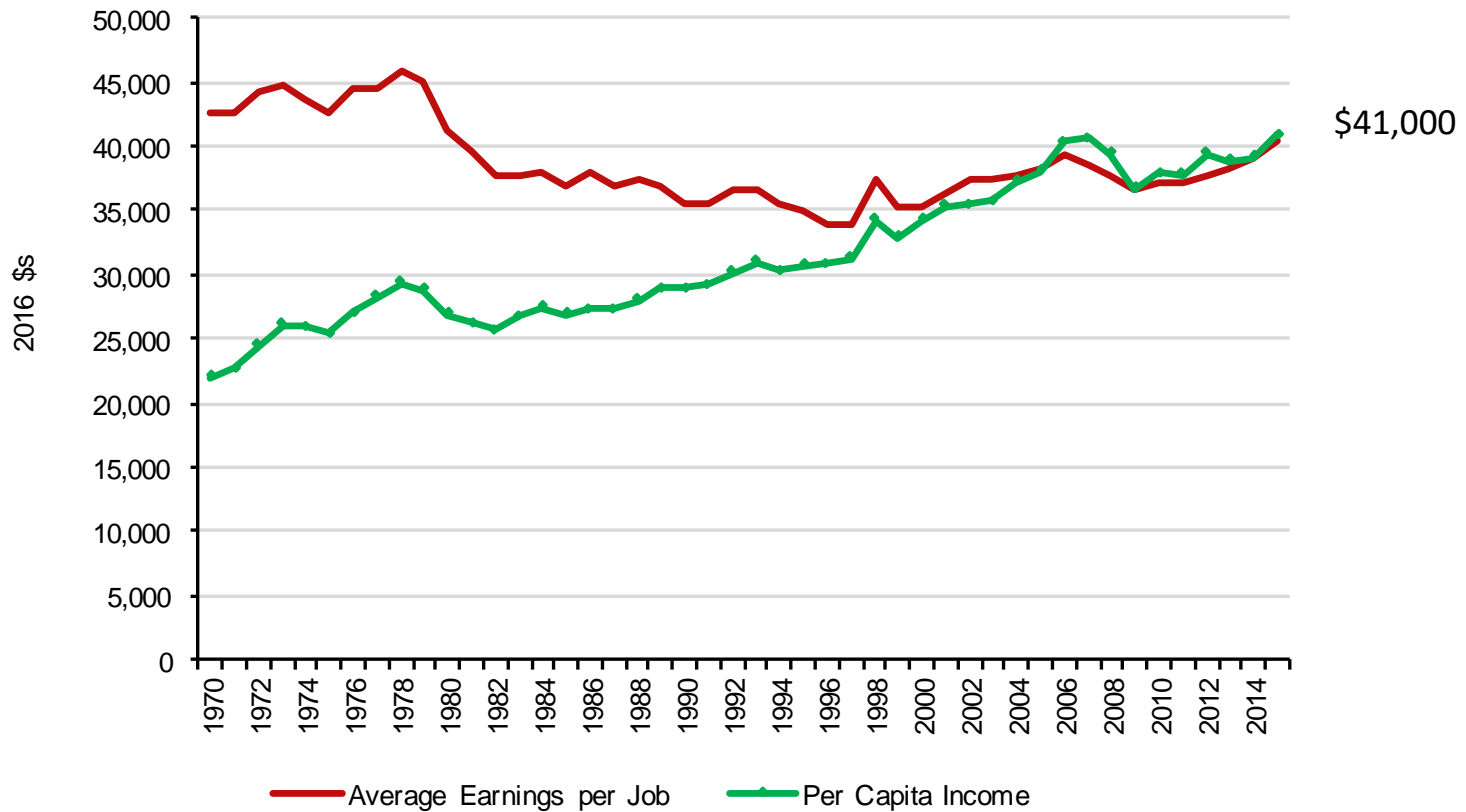


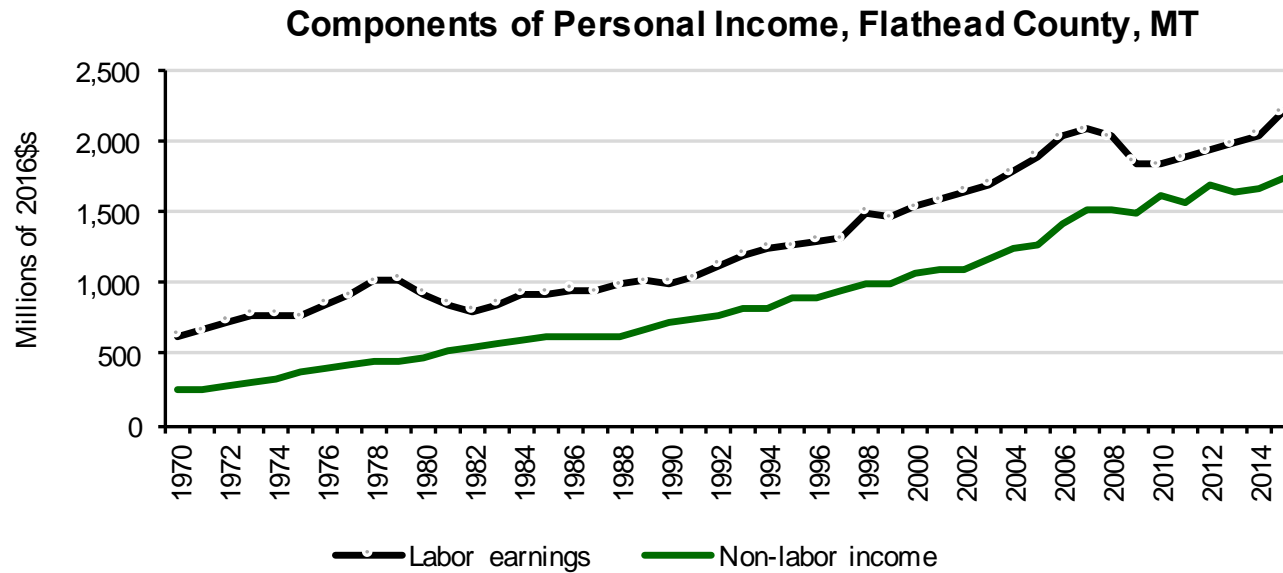
54% Personal Income

Personal Income Trends, Flathead County, MT



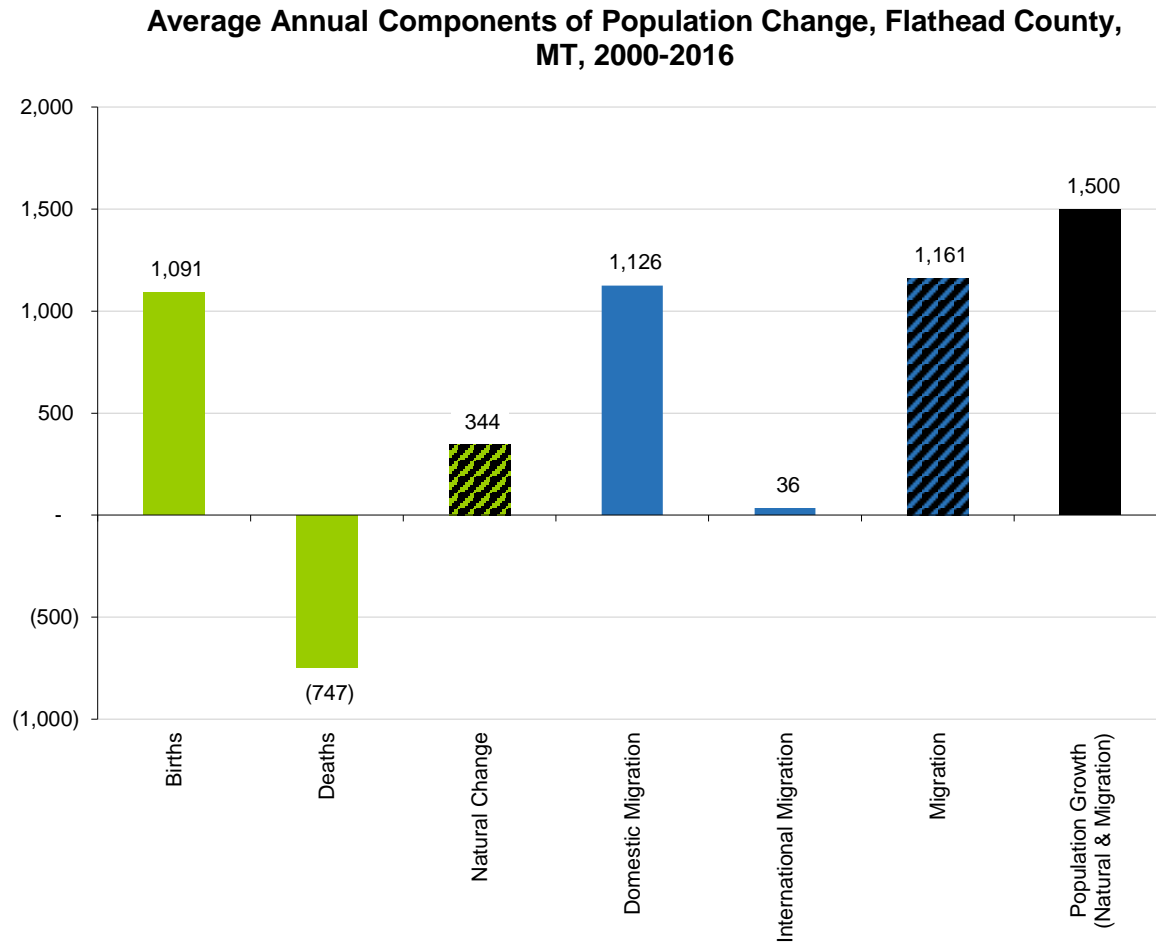
Average Earnings per Job & Per Capita Income, Flathead County, MT



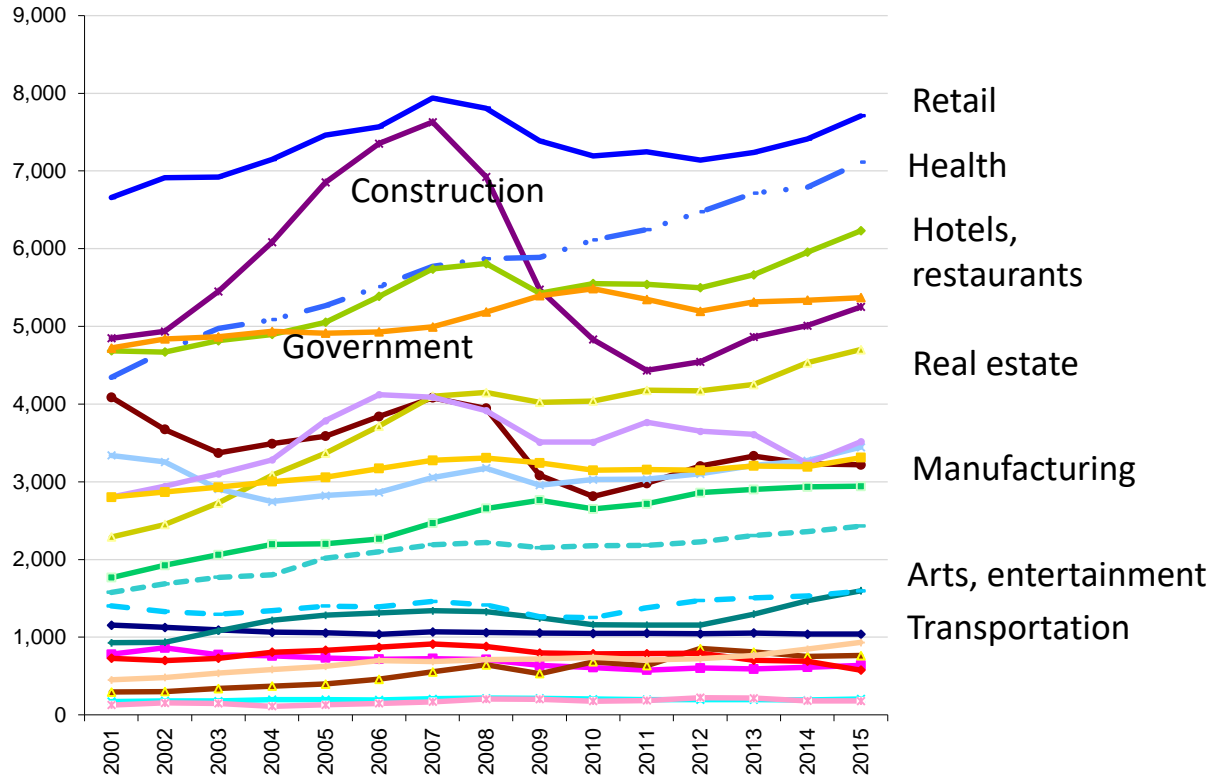


Non-labor income (investments, Social Security, Medicare, etc.) is 44% of all personal income and accounts for 50% of income growth since 2000

From 2000 – 2016, **migration** contributed 77% of population growth



Employment by Industry, Flathead County

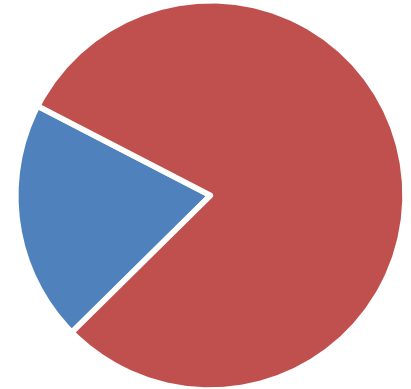


The impact of Montana's outdoors exists within numerous sectors



**Travel & Tourism
Related Sectors
in Flathead County**

20% of
Jobs



In 2015, nonresident **visitors to Flathead County** spent \$635 million, leading to:

10,070 jobs more than construction & and manufacturing combined

\$31.4 million in local and state taxes

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**HEADWATERS
ECONOMICS**

