Business for Montana’s Outdoors
Five-Year Report:
Montana’s Public Lands, Jobs, & the Economy
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.
TOTAL POPULATION CHANGE BY COUNTY, 2000-2015

Avg. Annual Population Change:
- 0 to -32
- 1 to 50
- 51 to 500
- 501 to 2,158

CHANGE IN EMPLOYMENT BY INDUSTRY, MONTANA, 2000-2015

<table>
<thead>
<tr>
<th>Industry</th>
<th>Net Change</th>
<th>Services</th>
<th>Non-Services</th>
<th>Government</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health care &amp; social assistance</td>
<td>16,865</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Real estate &amp; rental &amp; leasing</td>
<td>10,487</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation &amp; food services</td>
<td>8,200</td>
<td></td>
<td></td>
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<tr>
<td>Professional &amp; technical services</td>
<td>6,486</td>
<td></td>
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</tr>
<tr>
<td>Retail Trade</td>
<td>6,351</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td>6,347</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mining</td>
<td>6,338</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arts, entertainment, &amp; recreation</td>
<td>5,577</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government &amp; government enterprises</td>
<td>4,169</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative &amp; waste services</td>
<td>4,062</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance &amp; insurance</td>
<td>3,857</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educational services</td>
<td>3,476</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>2,588</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Other services, except public admin.</td>
<td>1,242</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation &amp; warehousing</td>
<td>1,095</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forestry, fishing, &amp; related activities</td>
<td>-989</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>-1,019</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Farm employment</td>
<td>-2,258</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

102,000 net new jobs and 85% in SERVICES
CHANGE IN PERSONAL INCOME BY SOURCE, MONTANA, 1970-2015

- Non-Labor
- Services
- Non-Services
- Government

Millions of 2016 $
Includes outdoor retailers, guides & outfitters, hotels and restaurants.
NON-LABOR PERSONAL INCOME AS PERCENT OF TOTAL, MONTANA, 2015

- Dividends, Interest & Rent, 22.7%
  Money earned from investments
- Age-Related, 11.2%
  Social Security, Medicare
- Hardship-Related, 4.6%
  Medicaid, Income maintenance, unemployment compensation insurance
- Other, 3.0%
  Veterans benefits, education and training assistance, all other, including Worker's Comp.
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

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

<table>
<thead>
<tr>
<th></th>
<th>High proportion federal land</th>
<th>Low proportion federal land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net migration rate</td>
<td>3.14</td>
<td>-3.47</td>
</tr>
<tr>
<td>Population change rate</td>
<td>2.87</td>
<td>-2.22</td>
</tr>
<tr>
<td>Employment change rate</td>
<td>9.22</td>
<td>4.64</td>
</tr>
</tbody>
</table>

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

- Top 25th percentile (counties with the most federal lands)
- Bottom 25th percentile (counties with fewer federal lands)

Growth:
- Population: 20% (Top), 97% (Bottom)
- Employment: 51% (Top), 157% (Bottom)
- Personal Income: 90% (Top), 223% (Bottom)
- Per Capita Income: 57% (Top), 61% (Bottom)
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

29% Employment

54% Personal Income

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

Average Earnings per Job & Per Capita Income

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

Average Annual Components of Population Change, Flathead County, MT, 2000-2016

- Births: 1,091
- Deaths: 747
- Natural Change: 344
- Domestic Migration: 1,126
- International Migration: 36
- Migration: 1,161
- Population Growth (Natural & Migration): 1,500

The impact of Montana’s outdoors exists within numerous sectors.
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

Nonresident expenditures from Inst. Tourism & Recreation Research, University of Montana: http://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1352&context=itrr_pubs
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