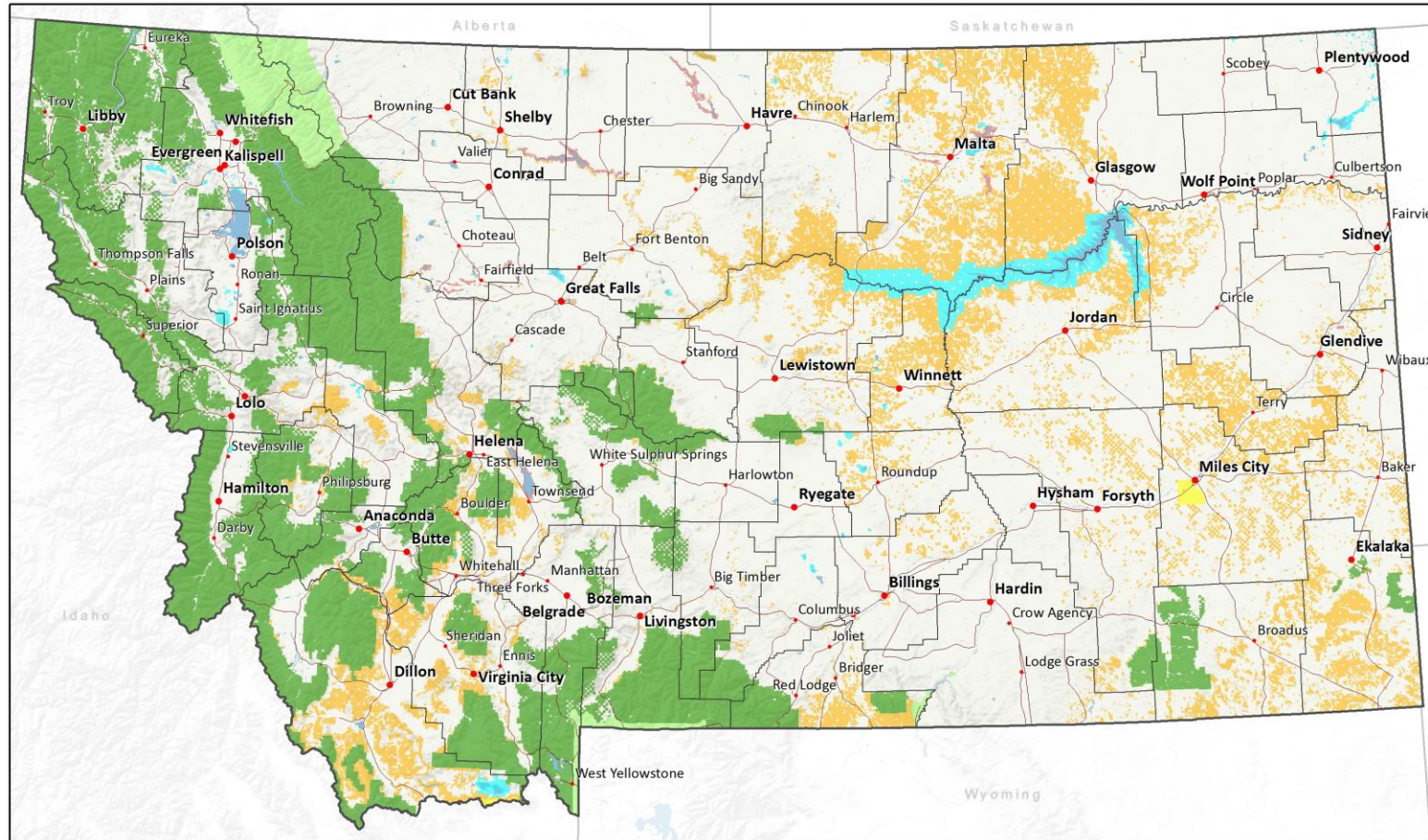


# Where Montana Technology Meets the Outdoors

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# Montana's Public Lands



## Federally Managed Lands in Montana

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

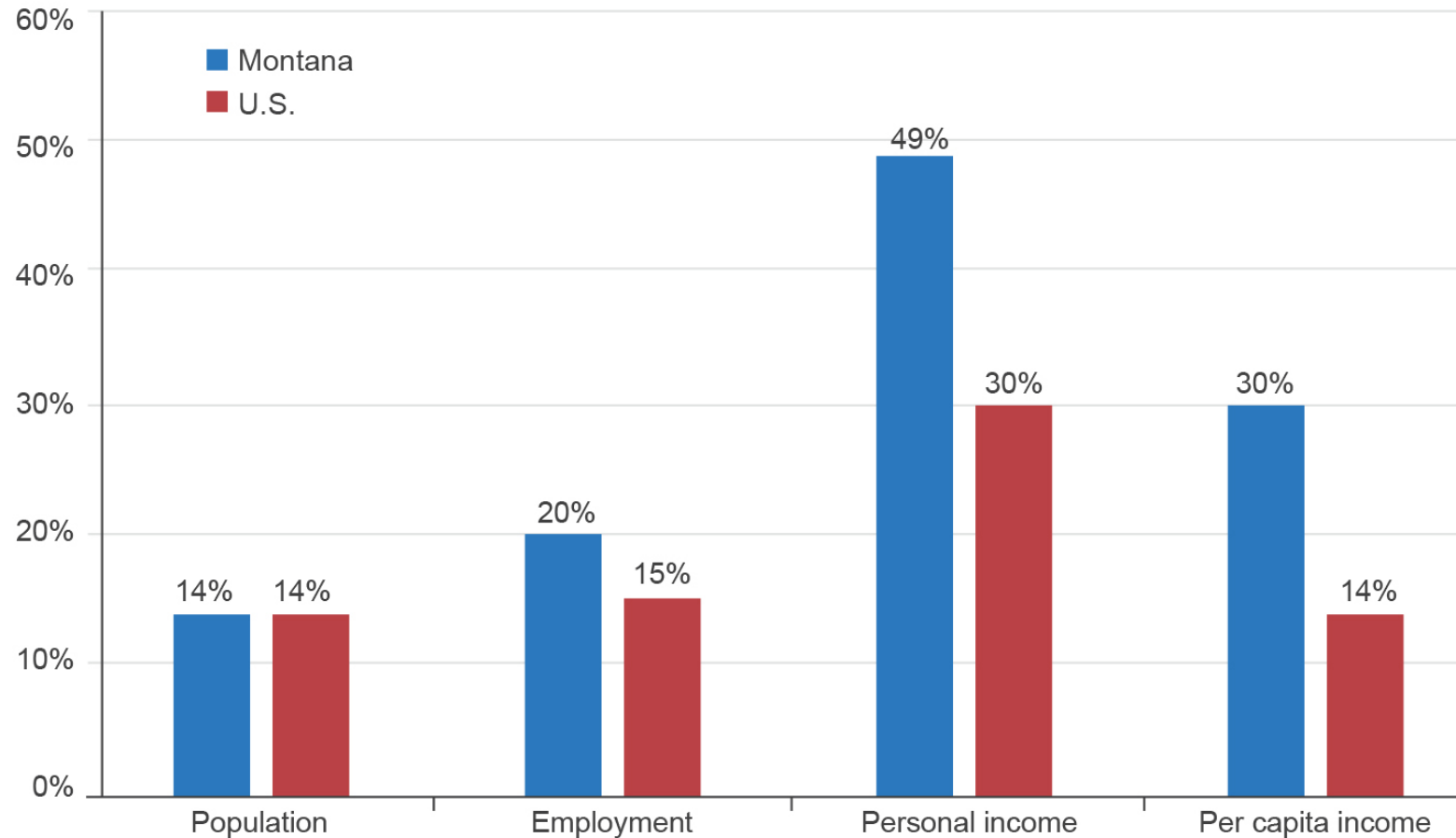
**30% Federal  
Public Lands**

Forest Service  
Park Service  
BLM  
US Fish & Wildlife



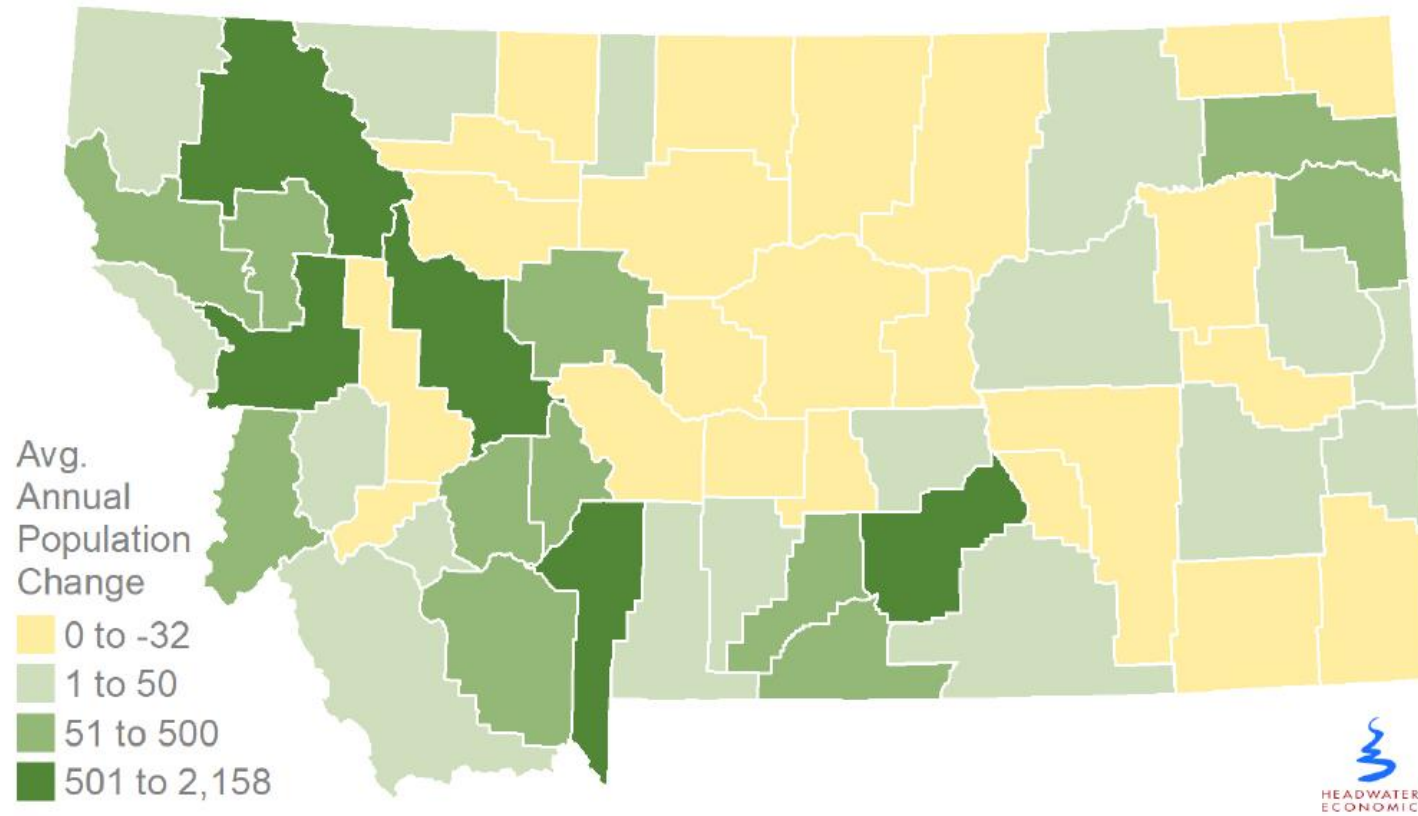
# Montana Growing Faster Than Nation

Montana vs. U.S., % Change, 2000-2015



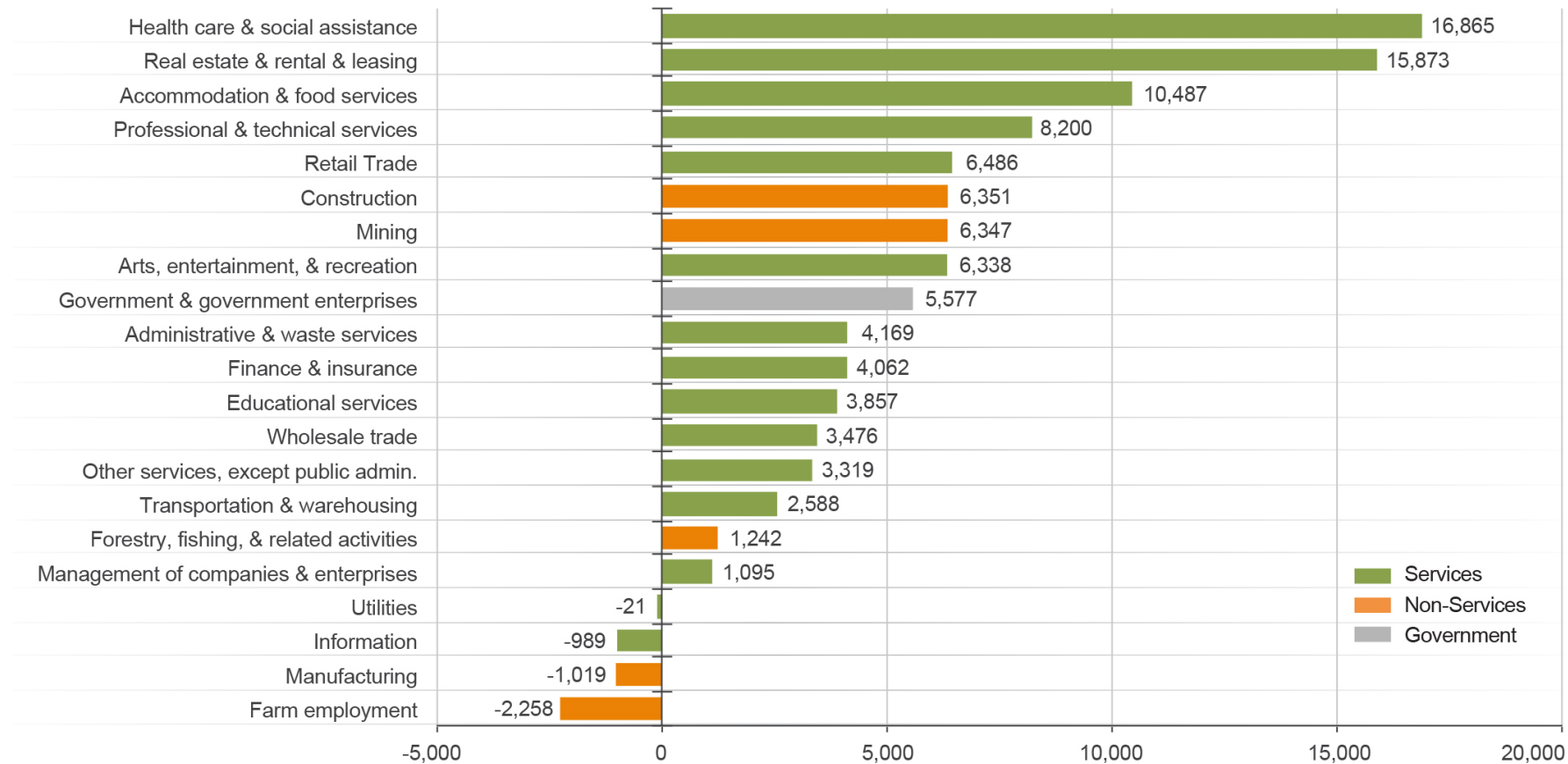
# Most of the Growth is in Western Montana

## Population Change, 2000-2015



# 85% of New Jobs in Montana in Services

## Change in Montana Employment by Industry, 2000-2015

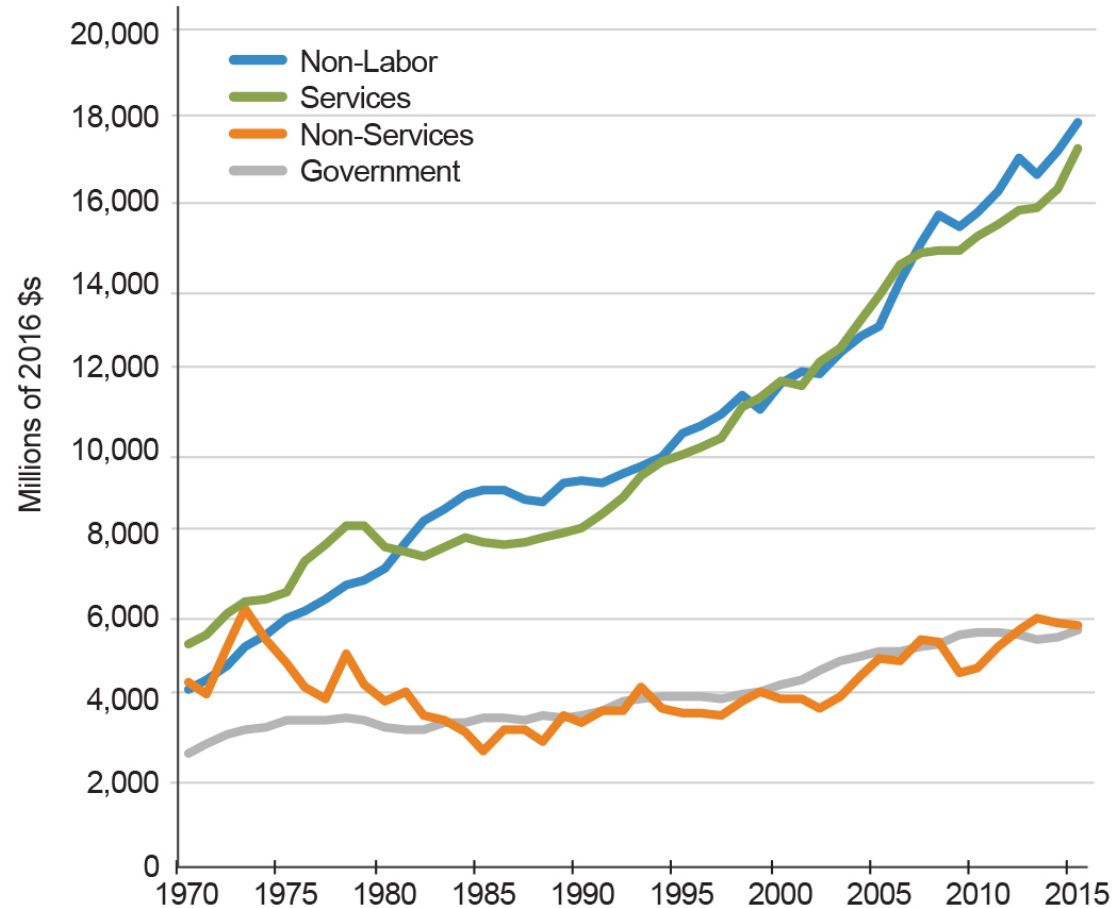


102,000 net new jobs

85% in SERVICES

# Services and Non-Labor Income Fastest Growing

Change in Personal Income by Sources, Montana, 1970-2015



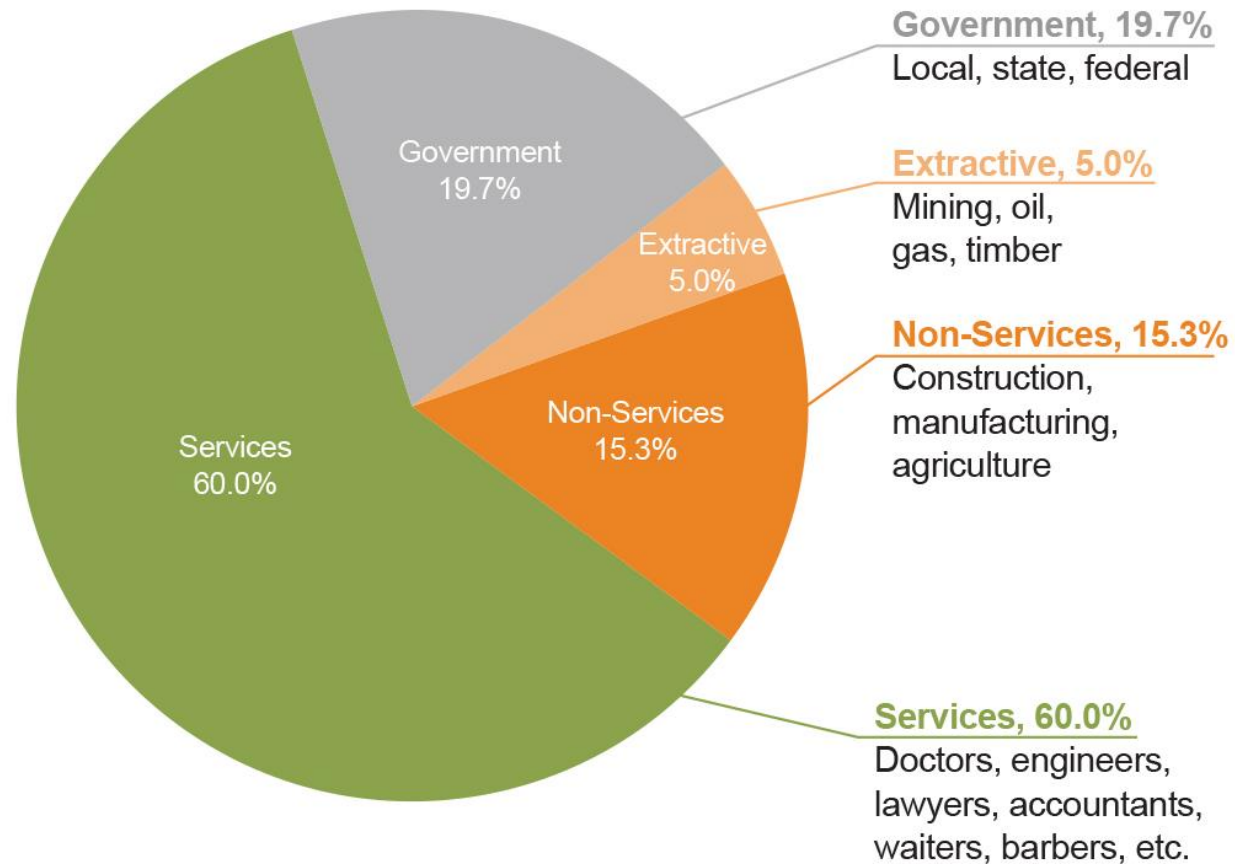
**Retirement, investments, Social Security, Medicare, Medicaid, etc.**

**Doctors, engineers, lawyers, accountants, waiters, barbers, high-tech workers, etc.**



# 60% of Labor Income in Montana From Services

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# Gallatin County



## Clean Water

Water for drinking, for fisheries, and for agriculture is protected when natural areas are buffered from development.



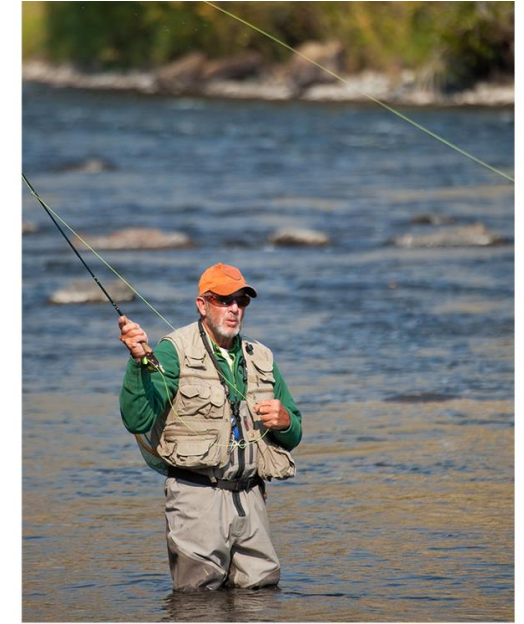
## Working Lands

Working farms and ranches and wide, open landscapes are part of the fabric and culture of Gallatin County.



## Wildlife

Healthy wildlife populations like elk, mule deer, and bears are dependent on connected, open lands.



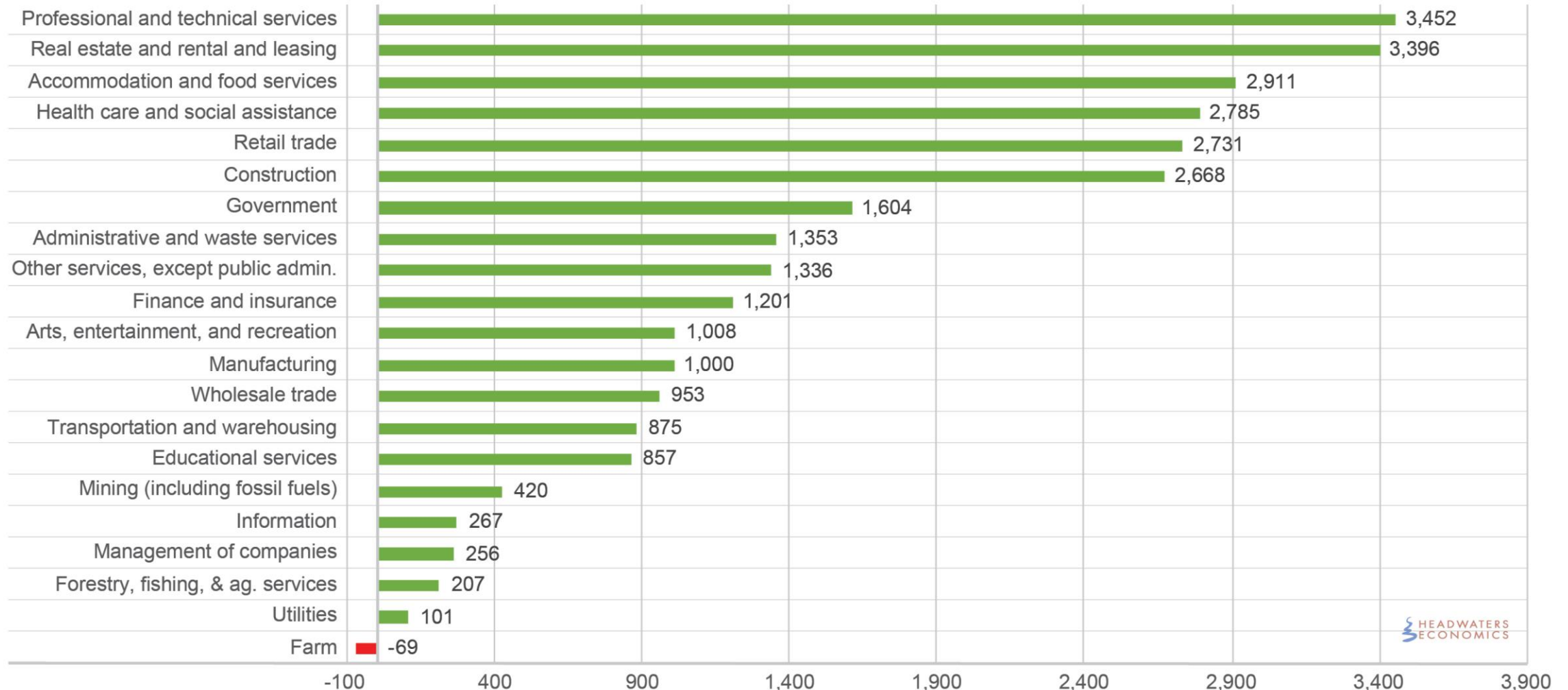
## Heritage

The community's sense of character is tied to outdoor heritage.



# 95% of New GALLATIN COUNTY Jobs in Services

## Change in Gallatin County Employment by Industry, 2000-2016



Robert Keith  
Beartooth Capital



“Our business model is entirely predicated on the unique and special aspects of the American west – ranging from the wide-open spaces to the wildlife that inhabit them.”

Jeff Batton  
Greenstone Growth Partners



“By basing ourselves in a location that balances quality of life issues with entrepreneurial drive, we have been able to find the "sweet spot”

# 5 Counties Responsible for 75% of Job Growth

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 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.

### Clean water

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

### Scenery

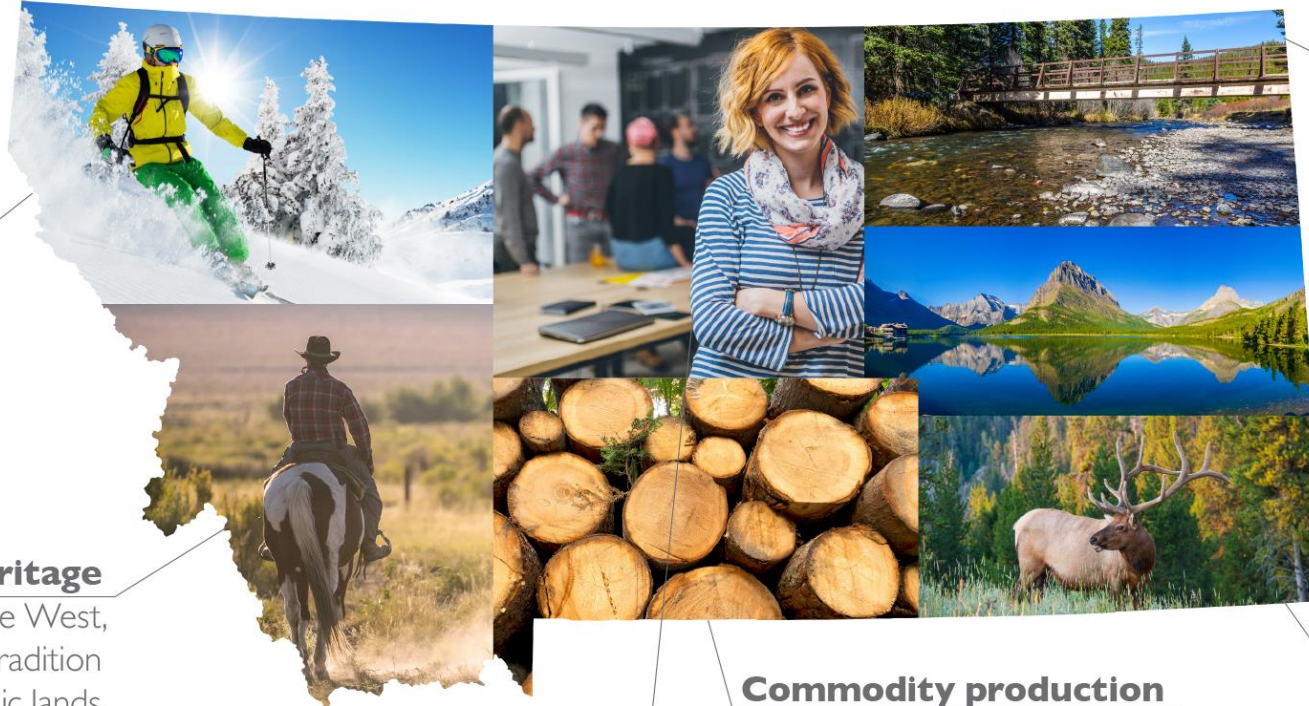
Tourists, entrepreneurs, workers, and retirees all are attracted to communities with access to nearby beautiful public lands.

### Wildlife

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

### Commodity production

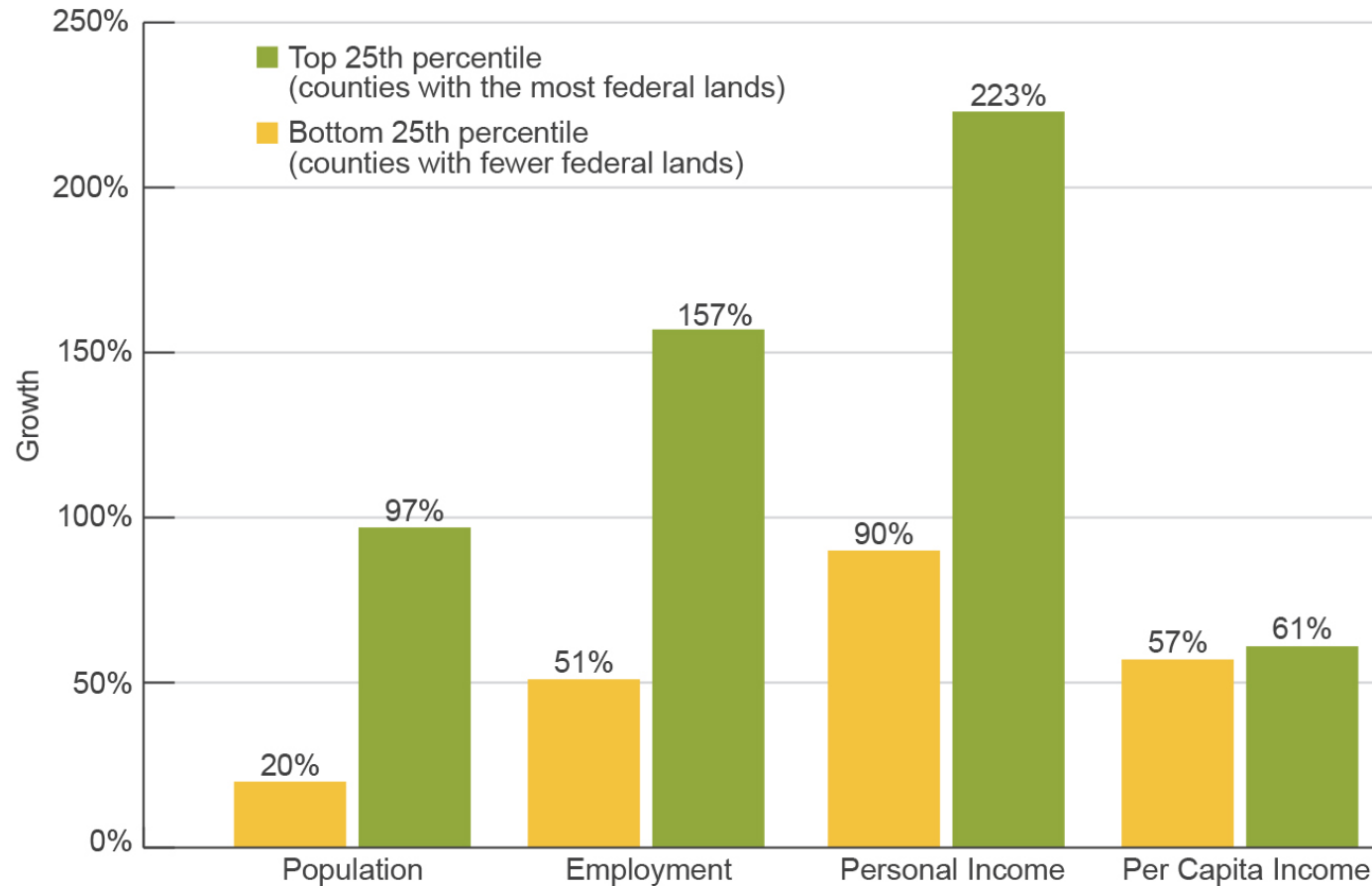
While employment in timber, mining, oil and gas now account for only five percent of personal income in the rural West, in some communities resource extraction remains important.





# Federal Land Counties Grow Fastest

## Non-Metro Western Counties With Federal Lands, 1970-2015



# Recruitment of Talent

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Bozeman, Montana in the 1990s

“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*

# High-Tech in Montana

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15,000 jobs

Wages per job \$68,544  
(state average \$41,775)

Wages grew by 6.3% in  
the last year, jobs by 3.3%

\$1.03 billion in wages

2,368 establishments





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