

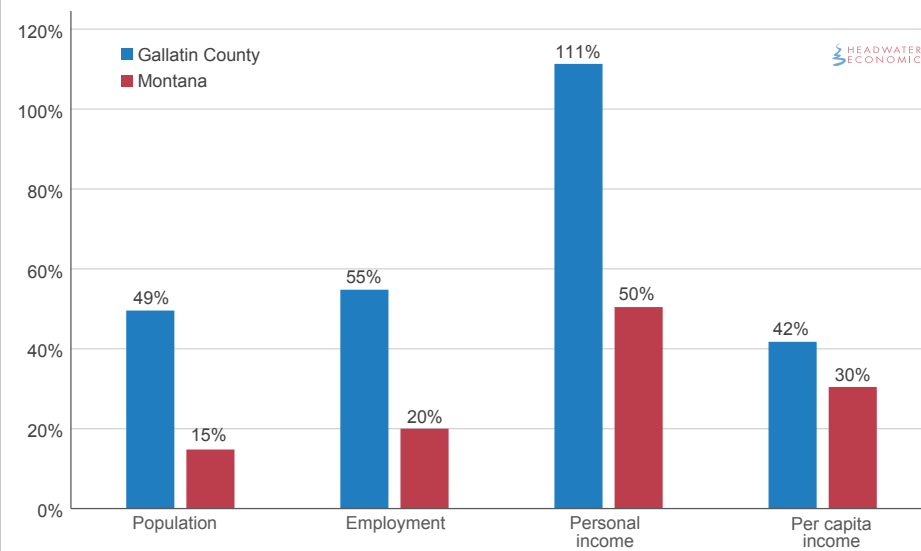


# GALLATIN COUNTY'S ECONOMY, GROWTH, AND OPEN SPACE

This report summarizes Gallatin County's economy, analyzes how it has grown, and explores what is driving its current and future performance. The report also includes a description of how local growth threatens open space and the role that these lands play in preserving Gallatin County's quality of life.

## Gallatin County Is Growing Faster Than Montana

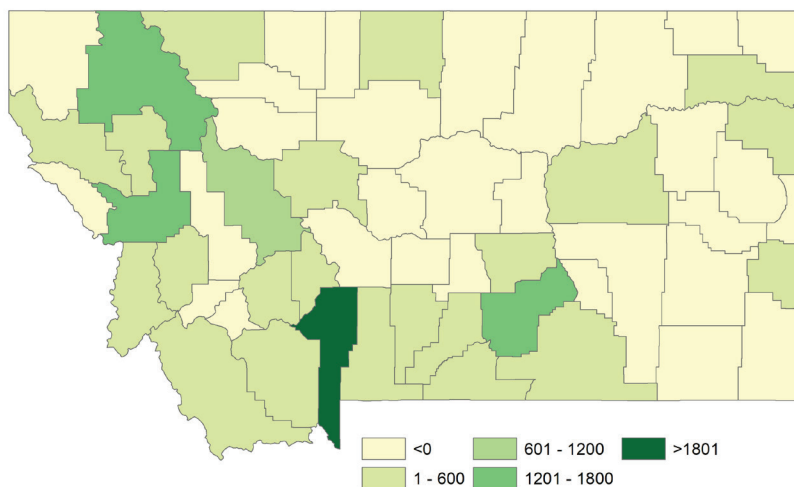
Gallatin County vs. Montana, Percent Change, 2001-2016



FROM 2001-2016,  
**GALLATIN  
COUNTY'S  
POPULATION  
GREW 3X  
FASTER**  
THAN THE STATE

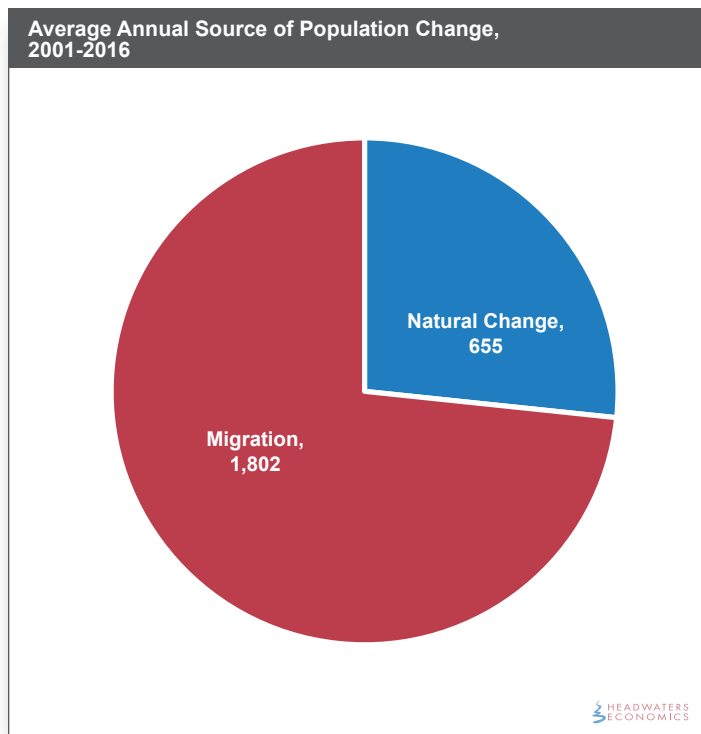
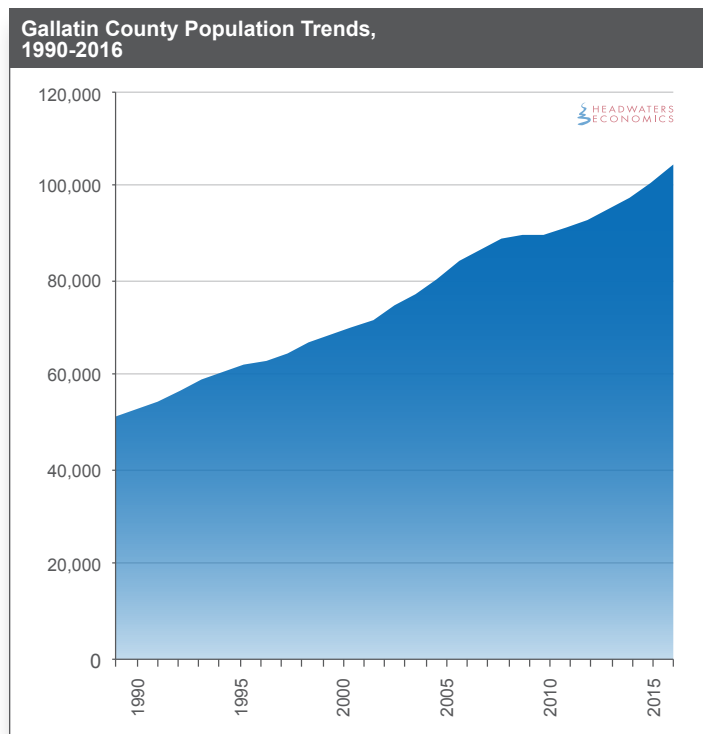
From 2001-2016, Gallatin County's population, employment, total real personal income, and real per capita income increased substantially faster than Montana as a whole.

Average Annual Population Change, 2000-2016



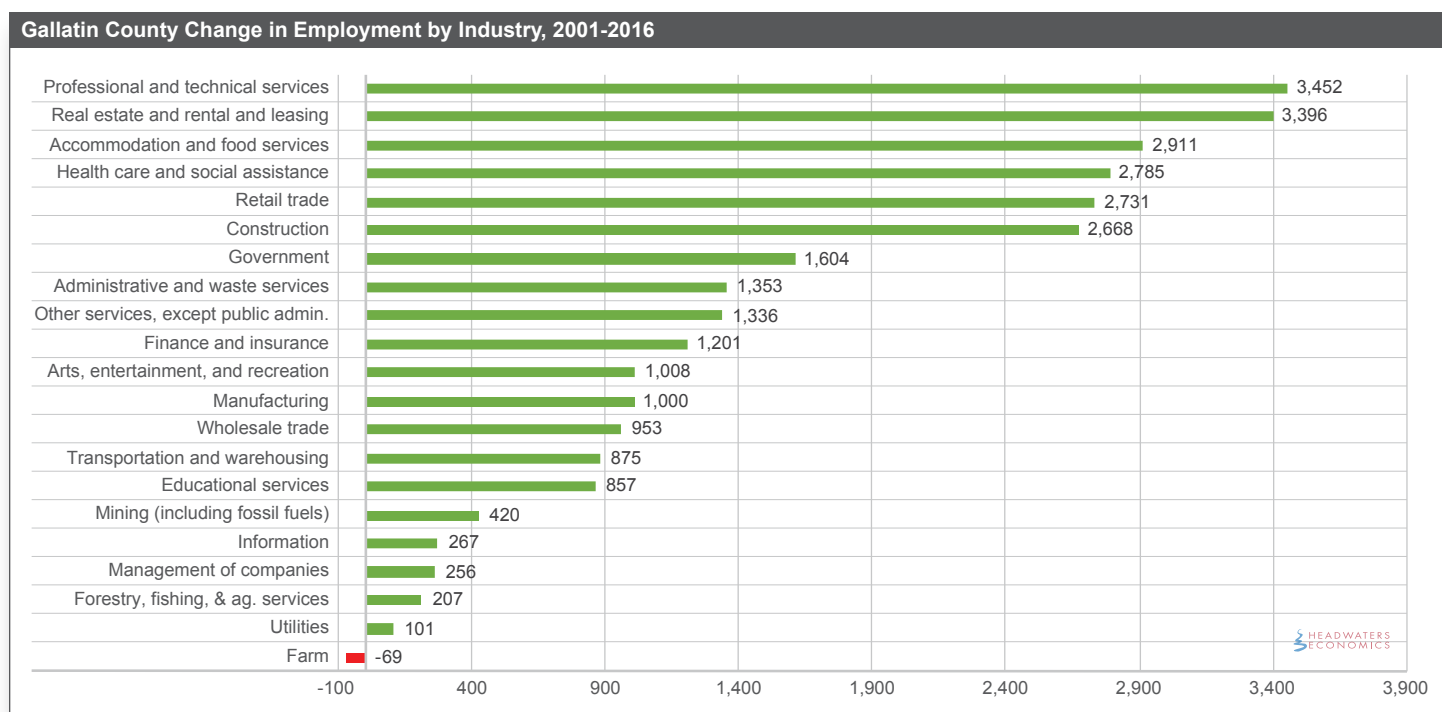
*Gallatin County's high  
quality of life and  
natural amenities attract  
entrepreneurs, workers,  
retirees, and tourists. While  
the economy diversifies,  
the rapid pace of growth  
threatens the open space  
and natural amenities that  
draw and keep people here.*

# Gallatin County's Population Has Doubled Since 1990



Gallatin County added more than 50,000 residents since 1990. The population in 2016 was 104,502. Nearly three-quarters of the population growth is from the arrival of new residents in the last 15 years.

## All Sectors of the Economy Are Growing, Except Farm



Farm is the only sector that lost jobs since 2001. Every other industry is growing. Professional and technical services, real estate and rental and leasing, accommodation and food services, health care and social assistance, and retail trade are growing the fastest.

# Gallatin County Created More Than One-Quarter of the State's New Jobs

Job Growth for Five Fastest-Growing Counties in Montana, 2001-2016

County	New Jobs	% Job Change	% of Net New Montana Jobs	Biggest Employers (2016)
Gallatin	29,085	55%	27%	Government, retail trade, accommodation and food services, construction, professional and technical services, health care and social assistance
Yellowstone	19,500	22%	18%	Health care and social assistance, retail trade, government, accommodation and food services, construction
Flathead	14,197	28%	13%	Retail trade, health care and social assistance, accommodation and food service, government, construction
Missoula	13,602	20%	12%	Health care and social assistance, government, retail trade, accommodation and food services, professional and technical services
Lewis & Clark	9,284	24%	8%	Health care and social assistance, retail trade, accommodation and food services, professional and technical services, other

HEADWATERS  
ECONOMICS

## Gallatin County Has Many Factors That Indicate Likely Future Growth

**High Quality of Life & Natural Amenities**

People are drawn to communities with open space, access to public lands, and quality schools.



**Diverse Economy**

More than 29,000 jobs in many industries were added since 2001.



**Skilled Workforce**

Nearly half of residents have a college degree—more than any other Montana county.



**Thriving University**

With 16,700 students, MSU has seen record enrollment ten years in a row.



**Bozeman Yellowstone International Airport Non-Stop Destinations**

Seattle/Tacoma, Portland, San Francisco, Las Vegas, Los Angeles, Phoenix/Mesa, Dallas/Ft. Worth, Houston, Atlanta, Chicago, Minneapolis/St. Paul, Denver, Salt Lake City, New York/LaGuardia, Newark.

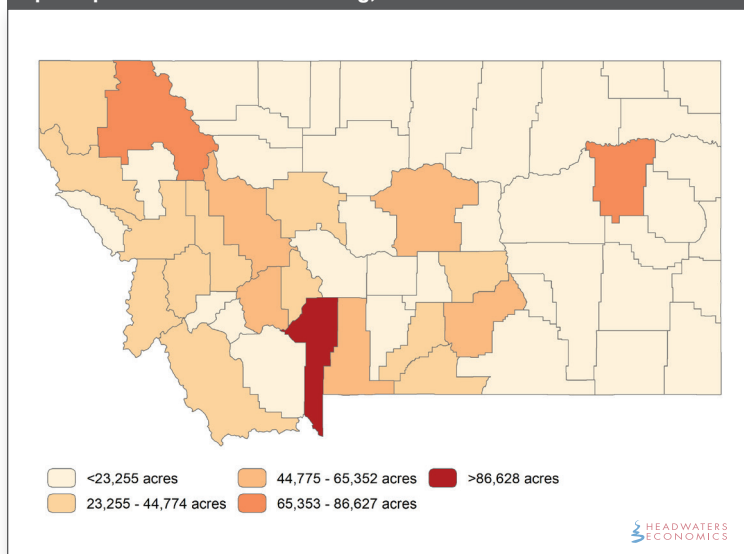
**Well-Connected Airport**

Bozeman is the busiest airport in the state with direct flights to 15 cities.



## Growth Threatens Open Space

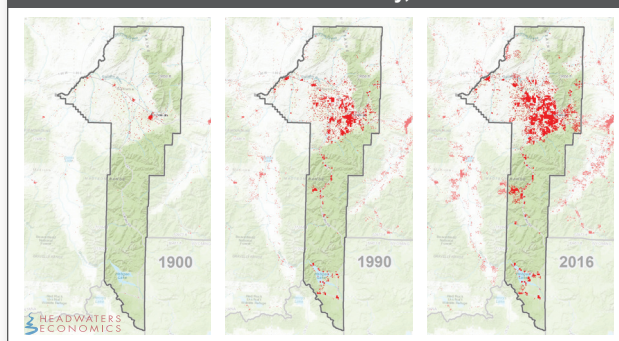
Open Space Converted to Housing, 1990-2016



Since 1990, 15 percent of all Montana homes were built in Gallatin County. From 1990-2016, 93,440 acres were converted from open space to sprawl—large lot (10+ acres) residential development. That's the equivalent of 146 square miles, or around six times the size of the City of Bozeman.

## GALLATIN COUNTY LOST MORE OPEN SPACE THAN ANY OTHER COUNTY IN MONTANA

Home Construction in Gallatin County, 1900-2016



From 1990 to 2016, the number of single-family homes in Gallatin County grew by 150 percent, from roughly 11,640 homes in 1990 to 28,938 in 2016. More than a third were built on lots greater than 10 acres.

## Open Space: Key To Gallatin County's Quality of Life



### 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.



### Economy

Open lands help diversify and strengthen economic opportunities.



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### References

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Airport flight information from: <https://bozemanairport.com/>

Open space data from: <https://headwaterseconomics.org/economic-development/local-studies/montana-home-construction>

MSU enrollment data from: <http://www.montana.edu/opa/facts/headhist.html>