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

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.

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

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

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.

Well-Connected Airport

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

Bozeman Yellowstone International Airport Non-Stop Destinations

[Map showing non-stop destinations from Bozeman Yellowstone International Airport]
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.

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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