

Outdoor Recreation and Montana's Economy

References and Data Sources, October 2018



Background



This document provides references for *Outdoor Recreation and Montana's Economy*, a report produced by Headwaters Economics in September 2018 for the Montana Office of Outdoor Recreation.

View the [full report](https://headwaterseconomics.org/moor) at <https://headwaterseconomics.org/moor>

Data Sources

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Figures about the size of outdoor industry in Montana and the U.S. from: Outdoor Industry Association. 2017. *Outdoor Recreation Economy Report*. <https://outdoorindustry.org/advocacy>

Helena South Hills Trail System information from: Sage, J.L. and N.P. Nickerson. 2018. *Trail usage and value—A Helena, MT case study*. Missoula, MT: University of Montana Institute for Tourism and Recreation Research. https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1366&context=itrr_pubs

Figures about non-motorized winter recreation in the Yellowstone region from: Newcomb, M. 2013. *Teton-West Yellowstone Region Backcountry Winter Recreation Economic Impact Analysis*. Boise, ID: Winter Wildlands Alliance. https://headwaterseconomics.org/wp-content/uploads/Trail_Study_33-teton-west-yellowstone-backcountry-winter.pdf

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Figures about the size of outdoor industry in Montana and the U.S. from: Outdoor Industry Association. 2017. *Outdoor Recreation Economy Report*. <https://outdoorindustry.org/advocacy>

Icons used by permission from: Outdoor Industry Association. 2017. *Outdoor Recreation Economy Report*. https://outdoorindustry.org/wp-content/uploads/2017/04/OIA_RecEconomy_FINAL_Single.pdf

Survey of Montana high tech industry from High Tech Business Alliance: <https://mthightech.org/wp-content/uploads/2018/02/2018-MHTBA-Survey-Final-Report.pdf>

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Figures about consumer spending, jobs, state and local taxes, wages and salaries, and participation in recreation from: Outdoor Industry Association. 2017. *Outdoor Recreation Economy Report*.

<https://outdoorindustry.org/advocacy>. Comparisons to other industries from U.S. Department of Commerce. 2017. Bureau of Economic Analysis, Regional Economic Accounts, Washington, D.C., reported by Headwaters Economics' Economic Profile System. <https://headwaterseconomics.org/eps>

Data in top bar chart from: Bureau of Economic Analysis. 2017. *Regional Economic Accounts*. <https://www.bea.gov/data/economic-accounts/regional>

Data in bottom bar chart from: Headwaters Economics. 2017. *Federal Lands in the West: Liability or Asset?* <https://headwaterseconomics.org/public-lands/federal-lands-performance/>

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Figures about resident spending from Outdoor Industry Association. 2017. *Outdoor Recreation Economy Report*. <https://outdoorindustry.org/advocacy>

Angler days and expenditure data from: Montana Fish, Wildlife & Parks, Human Dimensions Unit. 2017. *Summary of Research: Statewide Estimates of Resident and Nonresident Hunter & Angler Trip Related Expenditures in Montana*.

OHV expenditure data from: Sylvester, J.T. 2014. *Montana Recreational Off-Highway Vehicles: Fuel Use and Spending Patterns 2013*. Missoula, MT: University of Montana Bureau of Business and Economic Research. <http://www.bber.umt.edu/pubs/survey/MontanaOHVStudy2013.pdf>

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Figures about Montanans who recreate and believe the outdoor recreation economy is important from: Colorado College. 2018. *Conservation in the West Poll*.

<https://www.coloradocollege.edu/other/stateoftherockies/conservationinthewest/>

Statement that Montanans are more likely to be hikers from: Outdoor Industry Association. 2017. *Outdoor Recreation Economy Report*. <https://outdoorindustry.org/advocacy>

Statement that trails are a primary reason for state park visitation from: Nickerson, N.P. 2018. *The Montana Expression 2018: Resident Desires for MT State Park Amenities*. Missoula, MT: University of Montana Institute for Tourism and Recreation Research.

https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1373&context=itrr_pubs

State park visitation data from: Montana State Parks, 2017 Annual Visitation Report.

<http://stateparks.mt.gov/about-us/parksData.html>

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Table of Public Land Agencies:

- National Parks visitation and job impacts from: National Park Service. 2017. *National Park Visitor Spending Effects*. https://www.nps.gov/nature/customcf/NPS_Data_Visualization/docs/NPS_2017_Visitor_Spending_Effects.pdf. Also visualized by: Headwaters Economics. 2018. *National Parks Economic Impacts*. <https://headwaterseconomics.org/dataviz/national-park-service-units/>
- U.S. Forest Service visitation and job impacts from: USDA Forest Service. Personal communication, July 9, 2018 with Don English, Visitor Use Monitoring Program Manager. Jobs estimates include average annual full-time, part-time, temporary, and seasonal jobs.

- Bureau of Land Management visitation and job impacts from: Bureau of Land Management. Personal communication, September 10, 2018 with Josh Sidon, National Socioeconomics Lead, Bureau of Land Management. DOI Economic Report: https://www.doi.gov/ppa/economic_analysis. BLM assumed expenditures per person are the same as estimated by the U.S. Forest Service through their NVUM program.
- State Parks visitation and job impacts from: Montana State Parks. [2010 Economic Impact Survey of Visitors to Montana State Parks](#). In 2010, there were 1.9 million visitors who created 1,600 jobs. In 2016 there were more than 2.65 million visitors. There is no estimate of their job impact, but it is safe to assume it is higher than in 2010.

Expenditures by recreation type:

- Angler and hunter expenditure data from: Montana Fish, Wildlife & Parks, Human Dimensions Unit. 2017. *Summary of Research: Statewide Estimates of Resident and Nonresident Hunter & Angler Trip Related Expenditures in Montana*.
- Cyclist expenditure data from: Nickerson, N.P., et al. 2013. *Analysis of Touring Cyclists: Impacts, Needs, and Opportunities for Montana*. Missoula, MT: University of Montana Institute for Tourism and Recreation Research. http://headwaterseconomics.org/wp-content/uploads/Trail_Study_73-touring-cyclists-montana.pdf
- OHV expenditure data from: Montana State Parks. 2014. *Montana Recreational Off-Highway Vehicles: Fuel Use and Spending Patterns 2013*. Missoula, MT: University of Montana Bureau of Business and Economic Research. <http://www.bber.umt.edu/pubs/survey/MontanaOHVStudy2013.pdf>
- Alpine skiing expenditure data from: Nickerson, N.P. and K. Grau. 2010. *Economic Impact and Skier Characteristics: Montana*. Missoula, MT: University of Montana Institute for Tourism and Recreation Research. https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1194&context=itrr_pubs

Community examples:

- Whitefish Trail from: Headwaters Economics. 2018. *Measuring Whitefish Trail Use*. <https://headwaterseconomics.org/economic-development/trails-pathways/whitefish-trail-use/>
- Helena South Hills Trail from: Sage, J.L. and N.P. Nickerson. 2018. *Trail usage and value—A Helena, MT case study*. Missoula, MT: University of Montana Institute for Tourism and Recreation Research. https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1366&context=itrr_pubs Great Falls: <https://www.greatfallsribune.com/story/news/local/2016/02/04/rivers-edge-trail-great-falls-gem/79858560/>
- Information about Great Falls river trail system from: <https://www.greatfallsribune.com/story/news/local/2016/02/04/rivers-edge-trail-great-falls-gem/79858560/>
- Information about Three Forks' trails system from: <https://www.threeforksmontana.us/headwaters-trail-system/>
- Information about Dillon's trails system from: <https://www.beaverheadtrails.org/>
- Information about Hamilton and Missoula's Bitterroot Trail from: *Missoula 2 Lolo Trail*. 2013. TIGER Discretionary Grant Application. <ftp://ftp.ci.missoula.mt.us/Packets/MRA/2014/2014-05-28/2013%20TIGER%20Grant%20Narrative.pdf>

- Information about Glendive from: <http://visitglendive.com/> and <https://www.visitmt.com/listings/general/b-l-m-recreation-area/glendive-short-pines-open-ohv-area.html>
- Information about Malta from: <http://maltachamber.com/Attractions/malta-trails-hiking-and-walking-trails-and-community-excursions/> and <https://www.visitmt.com/listings/general/recreation-area-campground/trafton-park.html>
- Information about Ovando from: https://missoulian.com/news/state-and-regional/ovando-takes-a-lesson-from-twin-bridges-embraces-bicycle-tourism/article_5461ad16-3996-5a66-a7d3-c1feeae39ec8.html, <https://www.adventurecycling.org/resources/blog/oh-ovando-a-bicycle-travel-success-story/>, and <https://ovandomontana.net/cycle-friendly/>
- Information about Twin Bridges from: <https://www.bicycling.com/rides/a20011794/how-bike-touring-saved-this-small-town/> and <https://www.adventurecycling.org/adventure-cyclist/online-features/twin-bridges-rural-friendliness-pays-dividends/>

Figures about U.S. outdoor recreation economy and proportion of Gross Domestic Product from: Bureau of Economic Analysis, 2018. <https://www.bea.gov/news/2018/outdoor-recreation-satellite-account-updated-statistics-2012-2016>.

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About Headwaters Economics

Headwaters Economics is an independent, nonprofit research group whose mission is to improve community development and land management decisions. <https://headwaterseconomics.org/>