



OUTDOOR RECREATION & MONTANA'S ECONOMY



SEPTEMBER 2018

MONTANA'S OUTDOOR
RECREATION ECONOMY
GENERATES
**\$7.1 BILLION IN
CONSUMER SPENDING**
AND MORE THAN
71,000 JOBS.

Right: Helena's South Hills trail system supports 60 jobs and \$4.3 million in visitor spending annually. Below: Residents and visitors spend \$18.5 million on non-motorized winter recreation in the Yellowstone region, translating to \$3 million in labor earnings.



**AMERICAN CONSUMERS SPEND MORE ON OUTDOOR RECREATION
THAN THEY DO ON PHARMACEUTICALS OR MOTOR VEHICLES.**

OUTDOOR RECREATION IS OUR WAY OF LIFE AND AN ECONOMIC POWERHOUSE FOR MONTANA.

Creating more than 71,000 jobs and generating \$7.1 billion in consumer spending, outdoor recreation helps diversify our economy, improves our quality of life, and strengthens our community wellbeing. For many Montana communities, access to year-round outdoor recreation in our shared public lands and water is an essential component of long-term economic development and community identity. As more residents and visitors are active in Montana's great outdoors, stewardship of recreation assets requires investment of time, energy, and money for healthier communities, economies, and people.

THESE ACTIVITIES MAKE UP THE OUTDOOR RECREATION ECONOMY



CAMPING

RV campsite
Tent campsite
Rustic lodge



OFF-ROADING

ATV
ROV
Dune buggy
4x4 and Jeep



WHEEL SPORTS

Bicycling, paved road
Bicycling, off-road
Skateboarding



FISHING

Recreational fly
Recreational non-fly



SNOW SPORTS

Cross-country skiing
Downhill skiing
Nordic skiing
Snowboarding
Snowmobiling
Snowshoeing
Telemark skiing



WATER SPORTS

Kayaking
Rafting
Canoeing
Surfing
Scuba diving
Sailing
Stand-up paddling
Boating (cruising, sightseeing, wakeboarding, tubing, kneeboarding, waterskiing)



HUNTING

Shotgun
Rifle
Bow



TRAIL SPORTS

Day hiking on trail
Backpacking
Rock or ice climbing
Running 3+ miles
Horseback riding
Mountaineering



MOTORCYCLING

On-road
Off-road



WILDLIFE VIEWING

"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,
HARLOWTOWN*

DID YOU KNOW?

A survey of Montana's high-tech industries, which pays twice the median wage, shows that "Montana's quality of life - its lifestyle, the work/life balance available here, the recreation opportunities, and the beauty of the landscape" provides a significant advantage in business.

MONTANA'S OUTDOOR RECREATION ECONOMY CONTRIBUTES



Consumer Spending:

\$7.1 billion in consumer spending, more than half of which is contributed by Montana residents



Jobs:

71,000 direct jobs, which is 10% of all jobs in Montana and more jobs than in manufacturing and construction combined



State and Local Taxes:

\$286 million in state and local taxes



Wages & Salaries:

\$2.2 billion in wages and salaries to Montana workers



Quality of Life:

More than 80% of Montana residents participate in outdoor recreation

"MONTANA'S OUTDOOR ECONOMY GENERATES \$7.1 BILLION IN CONSUMER SPENDING ON AN ANNUAL BASIS AND THAT IS DIRECTLY RELATED TO OUR EXPANSIVE PUBLIC LANDS; THAT'S WHY PEOPLE COME HERE, AND THAT'S WHY PEOPLE SPEND MONEY HERE, THERE IS NO DOUBT ABOUT THAT."

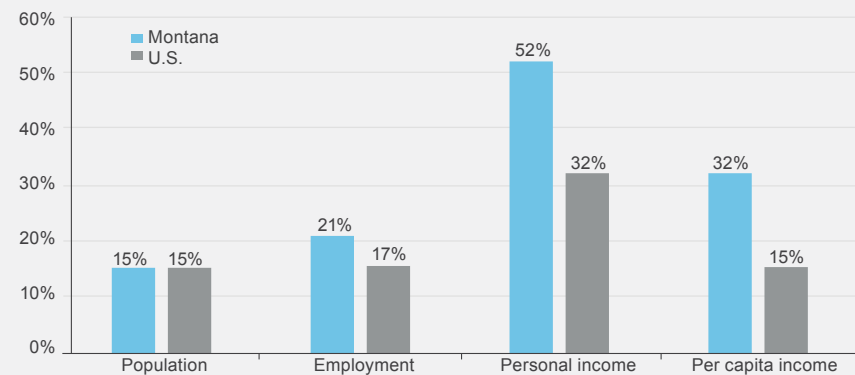
-GEORGE GAINES, CHILTON SKIS, MISSOULA

DID YOU KNOW?

- Montana has 33.8 million acres of public lands
- Nearly 170,000 miles of river, including the Yellowstone—the longest free-flowing river in the contiguous U.S.
- More than 3,200 lakes and reservoirs

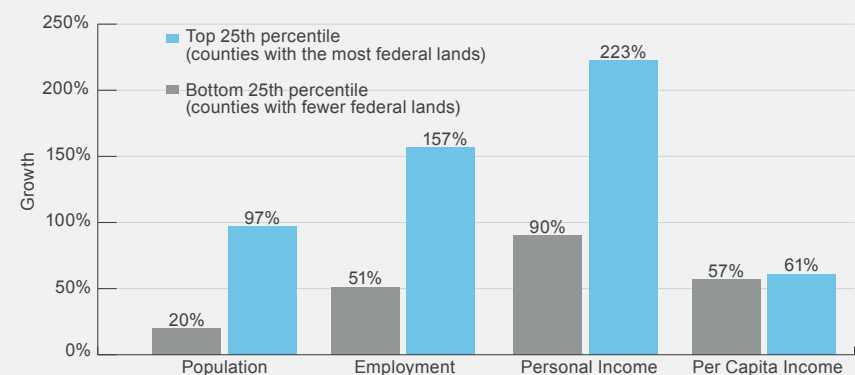
MONTANA IS GROWING AND OUTPERFORMING THE REST OF THE NATION

MONTANA VS. U.S., PERCENT CHANGE, 2000-2016



WESTERN U.S. RURAL COUNTIES WITH FEDERAL LANDS GROW FASTER

ECONOMIC PERFORMANCE OF RURAL WESTERN COUNTIES WITH FEDERAL LANDS, 1970-2015





RESIDENTS
OF MONTANA
SPEND
\$3.61 BILLION
ON OUTDOOR
RECREATION IN THE
STATE EACH YEAR.

Left: Like these anglers on the Missouri River near Cascade, residents and visitors spend more than 3 million days fishing Montana's rivers and lakes each year, spending \$919 million in the state. Below: Off-road recreators, like these at the Resort at Paws Up near Greenough, spend \$208 million in Montana each year.



MONTANA RESIDENTS ACCOUNT FOR 51% OF OUTDOOR RECREATION SPENDING IN THE STATE.

**IN A RECENT POLL,
87% OF MONTANANS ARE
OUTDOOR RECREATION
ENTHUSIASTS
AND
96% BELIEVE THAT THE
OUTDOOR RECREATION
ECONOMY IS IMPORTANT TO
THE ECONOMIC FUTURE
OF THE STATE.**

Right: A hiker enjoys a trail in the Bitterroot Mountains. Montanans are more likely than the average American to participate in day hiking, and trails are the primary reason Montanans visit state parks. Below: Hunters of upland birds, waterfowl, and big game spend more than 2 million days recreating in Montana every year, generating nearly \$400 million in expenditures.



VISITS TO MONTANA STATE PARKS HAVE INCREASED BY 40% OVER THE LAST DECADE.

WHERE AND HOW WE RECREATE IN MONTANA BENEFITS OUR COMMUNITIES

PUBLIC LANDS IN MONTANA



RECREATION ON PUBLIC LANDS CREATES JOBS

NUMBER OF VISITORS	PUBLIC LAND AGENCY	JOB'S CREATED FROM VISITOR EXPENDITURES
5.9 million	National Parks	8,762
7.5 million	U.S. Forest Service	3,000
4.6 million	Bureau of Land Management	3,186
2.5 million	State Parks	at least 1,600
20.6 MILLION VISITORS = MORE THAN 16,548 JOBS		

MONTANANS AND VISITORS RECREATE AND SPEND MONEY IN MANY WAYS



In 2017, **anglers** spent \$919.3 million in more than 3.3 million angling days



In 2017, **hunters** spent \$389.2 million in more than 2.6 million hunter days



Cyclists spend an average of \$75/day and stay in Montana for eight days, totaling \$600 per trip



Off-highway vehicle users in Montana spend \$208 million per year



Alpine skiers made an \$83 million economic impact in the four-month ski season of 2010

MANY MONTANA COMMUNITIES ARE INVESTING IN OUTDOOR RECREATION:

- The **Whitefish** Trail is associated with \$6.4 million in annual consumer spending by residents and visitors, supporting 68 new jobs.
- **Helena's** South Hills trail system supports \$4.3 million in visitor spending annually, supporting 60 jobs.
- **Great Falls** developed 60 miles of trail along the Missouri River in a public-private partnership.
- **Three Forks** spent \$1 million to develop the Headwaters Trail System, which is attracting growth to the community.
- **Dillon's** trail system is being designed for residents and community health.
- **Hamilton** and **Missoula** are working to connect the two communities with the 50-mile Bitterroot Trail, which is estimated to create an \$11.4 million benefit for the region.
- **Glendive** uses access to nearby Makoshika State Park as an economic development strategy.
- **Malta** is developing trail connections to the Missouri River to improve resident health and physical activity.
- **Ovando** and **Twin Bridges** have both made small financial investments to attract cycle tourism, which both communities say provides economic benefit to their communities.

"ACCESS TO THE MONTANA OUTDOORS IS A COMPETITIVE ADVANTAGE TO ATTRACT TOP TALENT AND BUILD A CULTURE THAT RETAINS HIGH PERFORMING PEOPLE."

-ALI KNAPP, WISETAIL, BOZEMAN

DID YOU KNOW?

In 2016 outdoor recreation in the U.S. accounted for 2.2% of Gross Domestic Product and is bigger than mining and utilities, about the same size as the chemical products industry, and just less than the size of broadcasting and telecommunications.

OUTDOOR RECREATION BENEFITS MONTANA'S ECONOMY IN MANY WAYS



QUALITY OF LIFE

The outdoors is an essential part of the Montana way of life— attracting, sustaining, and retaining individuals, families, and businesses. Our heritage, culture, and tradition are closely tied to the outdoors and access to public lands.



CREATING AND RETAINING JOBS

Montana employers have a strong competitive advantage over other states. Businesses use access to outdoor recreation as a way to attract talent and retain valuable employees.



BUSINESS/ ECONOMY

Many Montana businesses manufacture products for outdoor recreation and provide services for tourists and locals alike, creating jobs, income, and state and local taxes.



COMMUNITY WELLBEING

Outdoor recreation supports healthy communities. Studies show that access to the outdoors supports reduced crime rates, improves educational outcomes, and improves physical and mental health.

For more information about how the outdoor recreation economy impacts our state, how the state of Montana promotes the outdoor recreation economy, or to find out what you can do to support our outdoor recreation landscape, contact the Montana Office of Outdoor Recreation.



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Cover: Top: Cross country skiing at Whitefish. Left: Downtown Billings. Right: Family hikes on the Diane Gabriel Trail at Makoshika State Park in Glendive. Bottom: Biking, Mount Helena City Park, Helena.

Photos courtesy Montana Department of Commerce.

 HEADWATERS ECONOMICS Produced by Headwaters Economics • <https://headwaterseconomics.org>

For complete references, see <https://headwaterseconomics.org/moor>

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