

SEPTMBER 2020

# Outdoor Recreation & Montana's Economy



# economic impact

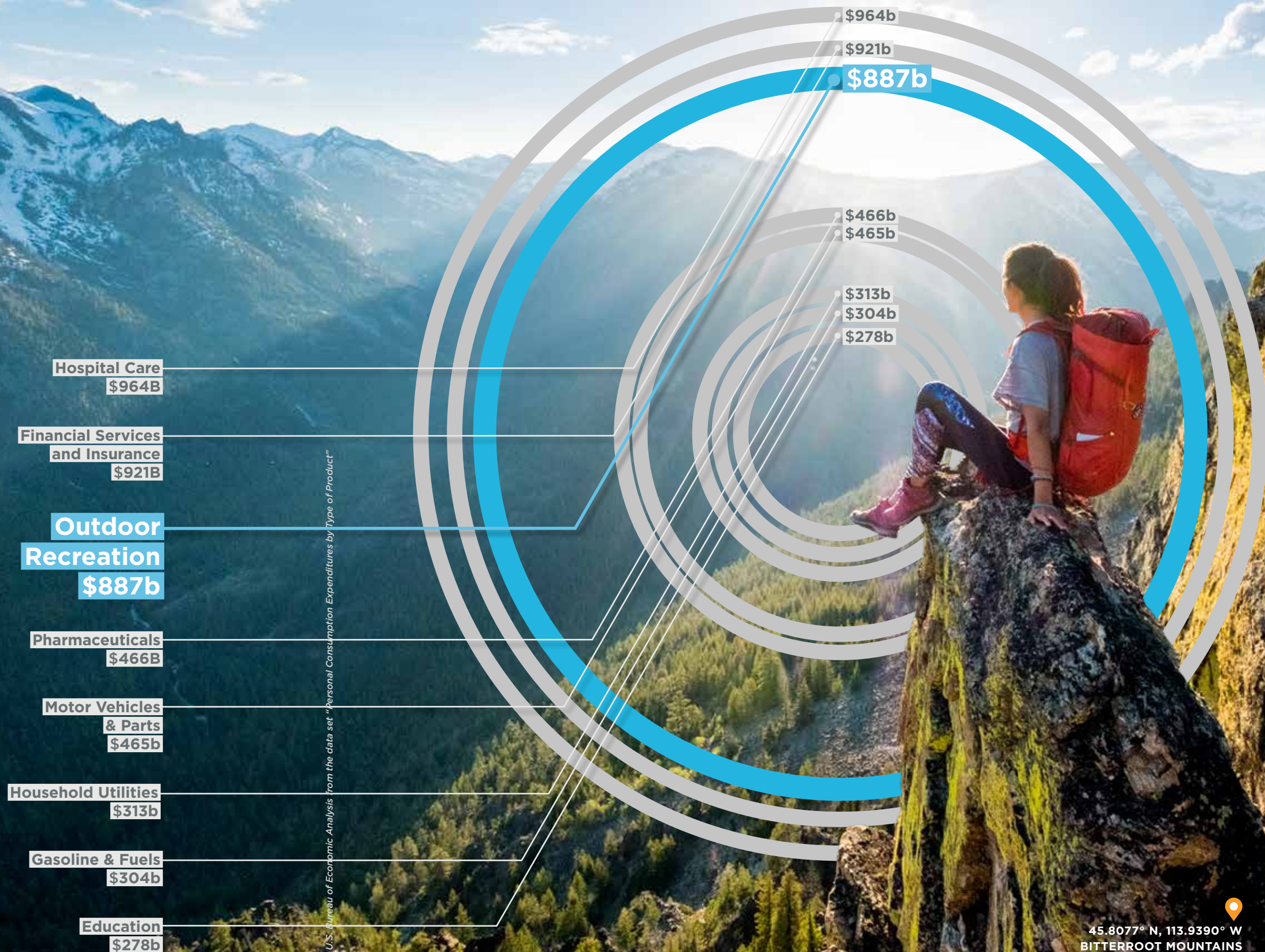
Montana's unrivaled landscape is a key component to the state's long-term economic goals. It gives Montana employers a strong competitive advantage over other states when it comes to attracting and maintaining top-tier talent. In lay terms, it means Montana's great outdoors generates a lot of opportunity. How much opportunity?

**\$7.1 billion**  
in consumer  
spending annually

**\$2.2 billion**  
in wages and State

**\$286 million**  
in state and local  
tax revenue

AMERICA'S ANNUAL CONSUMER SPENDING FOR ALL 50 STATES



American consumers spend more on outdoor recreation than on motor vehicles or pharmaceuticals.

America's outdoor industry is an economic powerhouse. In 2017, it accounted for 2.2% of America's Gross Domestic Product—bigger than mining and utilities. That's a lot of George Washingtons for Montana. How many?

**\$2.4 billion**

**5.1% GDP**

Montana's outdoor recreation economy is the U.S.'s second biggest.

47.4484203°N, -113.5986153°W  
HOLLAND LAKE, CONDON

BIG SKY BIG MONEY



**\$193 million**

The amount transportation companies made from outdoor recreation.

**\$121.1 million**

The amount real estate, rental, and leasing companies made from outdoor recreation.

**\$518.2 million**

The amount retail companies made from outdoor recreation.

**\$194.5 million**

The amount manufacturing companies made from outdoor recreation.

**10%** Of Montana jobs that are in the outdoor industry.



For each **\$1 million** spent in conservation activities, between **17 & 31** jobs are supported.

**96%**

Of Montana residents who believe outdoor recreation is important to the state's economic future.



THAT'S MORE JOBS THAN IN MANUFACTURING AND CONSTRUCTION COMBINED.

**\$900 million**

The amount of fishing-related consumer spending each year across 332 fishing access sites. (Initial investment for site development was approximately \$50m.)

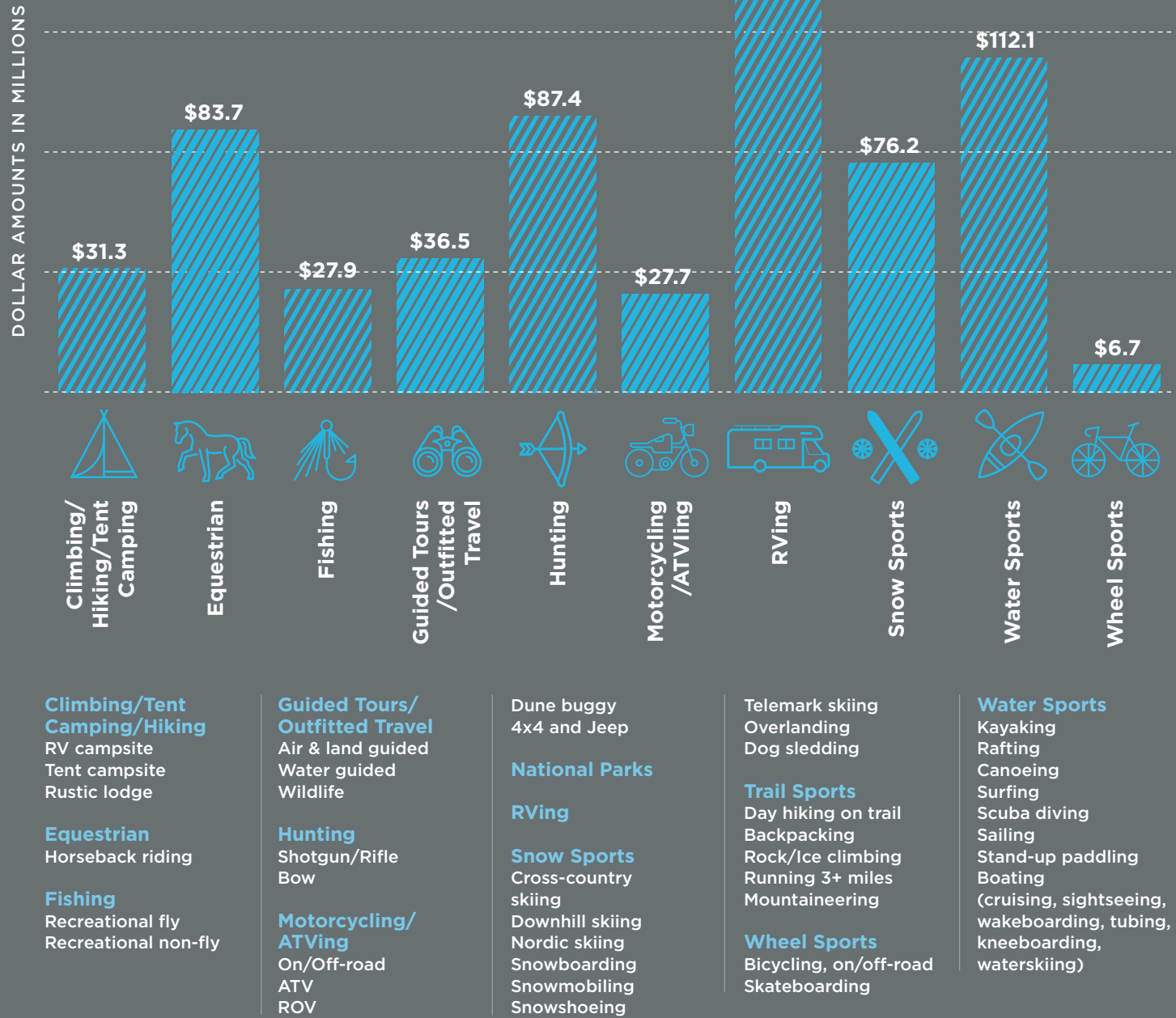
**81%**

**participation rate**



Montana residents who participate in outdoor recreation.

WHAT IS OUTDOOR RECREATION IN MONTANA IN GDP?



A CLOSER LOOK AT NON-CONSUMER SPENDING

Here's a closer look at five interests and how much monetary value they added to Montana's economy. (Hint: It's a lot.)



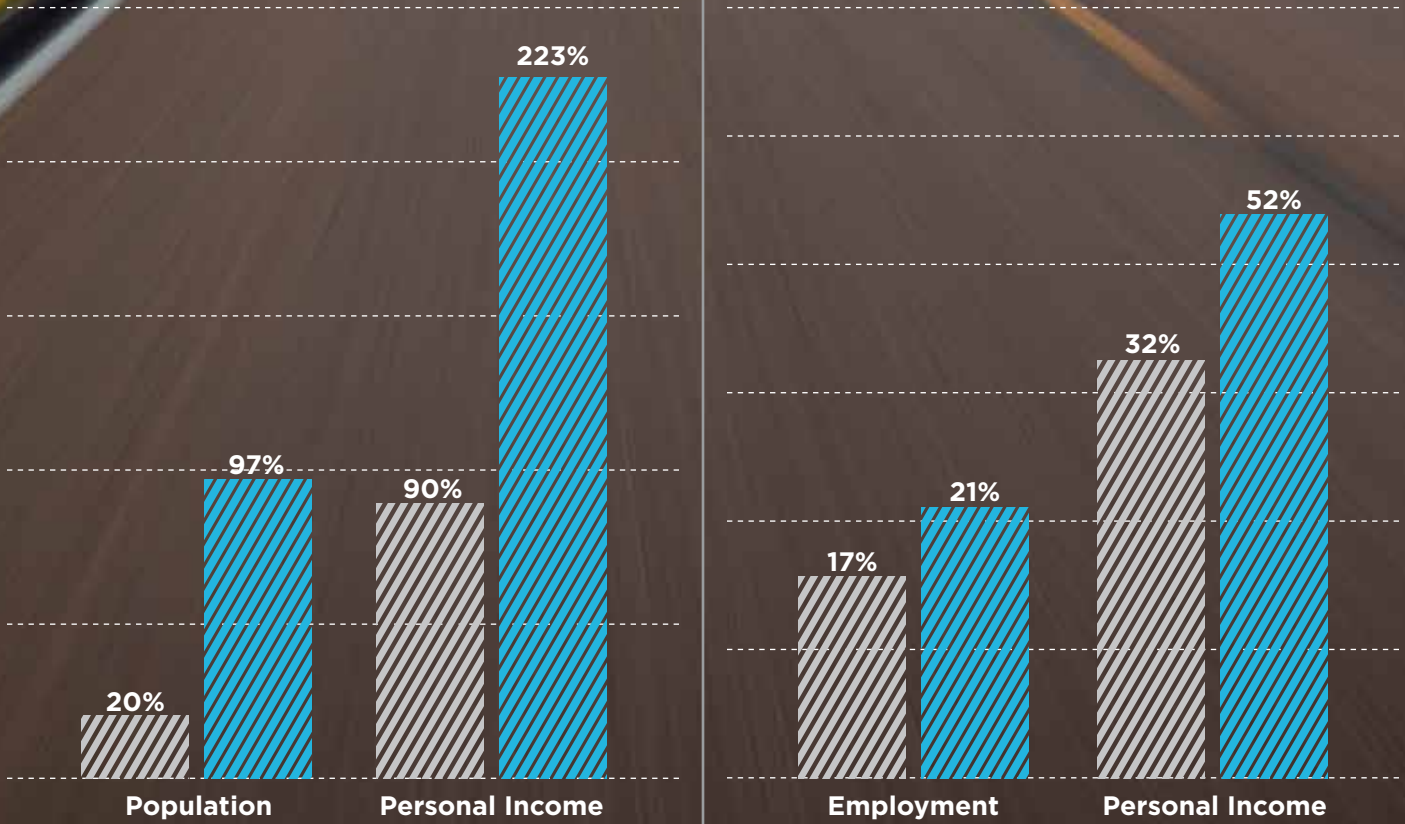
GDP data is from U.S. Bureau of Economic Analysis's Outdoor Recreation Value Added by Activity report. Non-consumer spending data is from Institute for Tourism and Recreation Research

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

MONTANA IS GROWING AND OUTPERFORMING THE REST OF THE NATION

Economic Performance of Rural Western Counties with Federal Lands, 1970-2015

Montana Vs. U.S., Percent Change, 2000-2016



Montana (blue bar)  
U.S. (grey bar)

FORT PECK, SCENIC HIGHWAY 

Investment in outdoor recreation is investment in Montana's trademark way of life. It attracts, sustains, and retains individuals, families, and businesses. The state's heritage, culture, and tradition are closely tied to the state's abundance of public lands. Our recreation opportunity and access attracts visitors, too. In 2019, 12.6M tourists visited to experience Montana's unique recreation-based culture. Tourism can bring in big money into experience based business, restaurants, lodges, stores, and local transportation. How big?

# \$3.8 billion

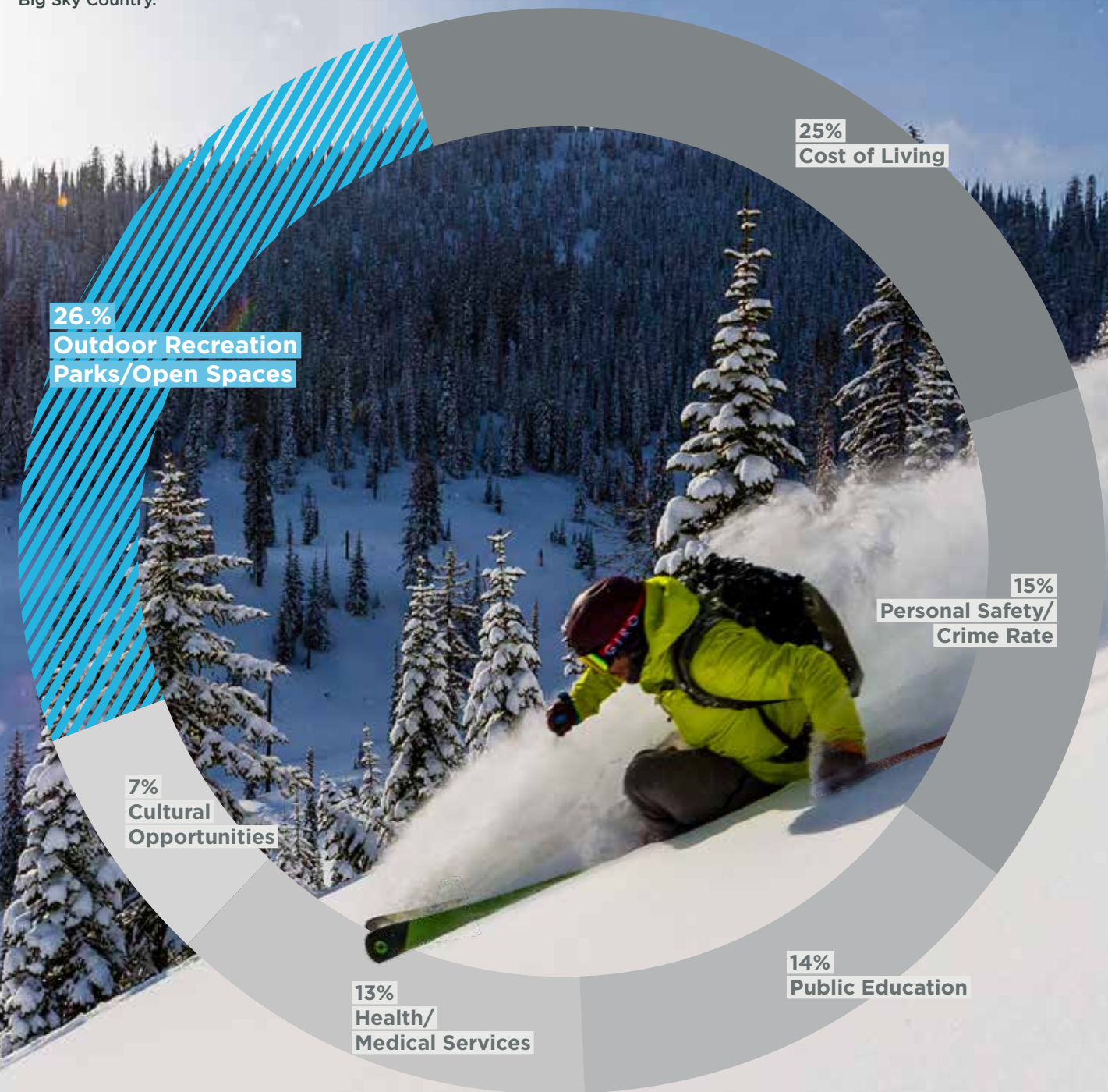
in non-resident spending



THAT'S 49% OF TOTAL CONSUMER SPENDING. THIS IS A 5.4% INCREASE IN SPENDING FROM 2018 TO 2019.

## QUALITY OF LIFE

A survey of Montana business owners ranked outdoor recreation as the top quality of life attribute influencing their decision to choose Big Sky Country.



48.4106° N, 114.3353° W  
WHITEFISH

QUALITY OF LIFE

Outdoor recreation and healthy communities are synonymous with one another. Studies show that communities with access to the great outdoors have reduced crime rates, better educational outcomes, and improved physical and mental health. That's why Montana's communities strive to heavily invest in outdoor recreation. Residents of Montana spend

# \$3.61 billion

on outdoor recreation in the state each year.



THAT'S 51% OF TOTAL CONSUMER SPENDING.



Here's a closer look at a dozen places and how much the communities have invested in outdoor recreation.

Visits to Montana state parks **increased 40%** over the last decade.

**Great Falls** developed 60 miles of trail along the scenic 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.

**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.

**Helena's South Hills** trail system supports \$4.3 million in visitor spending annually, supporting 60 jobs.

**Dillon's** trail system is being designed for residents and community health.

**Glendive** uses access to nearby Makoshika State Park as an economic development strategy.

**Ovando** and **Twin Bridges** have both made small financial investments to attract cycle tourism, which both communities say provides strong economic benefit to their communities.

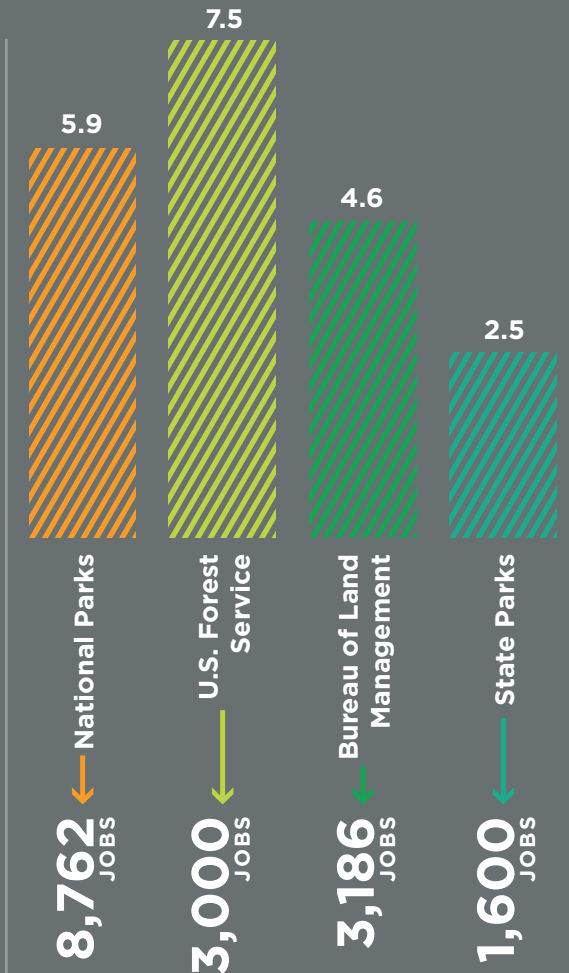
**Malta** is developing trail connections to the Missouri River to improve resident health and physical activity.

**Helena's South Hills** trail system supports 60 jobs and generates \$4.3 million.

Residents and visitors spend **\$18.5 million** on non-motorized winter recreation in the Yellowstone region, translating to **\$3 million in labor earnings**.

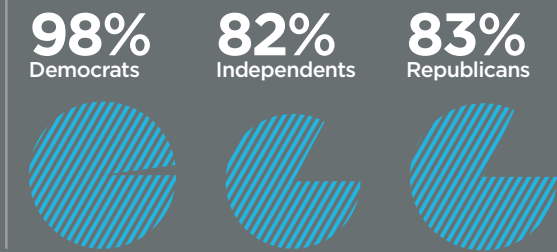
QUALITY OF LIFE

Visitors on public lands (amounts in millions)



**20.6M** Visitors created 16,548 jobs.

Support for the Office of Outdoor Recreation extends across party lines.



# The Impacts of Outdoor Recreation:

1

## Quality of Life

Montana's public lands attracts, sustains, and retains individuals, families, and businesses.

2

## Jobs

Montana employers attracts and retains talent

3

## Business & Economy

Many Montana businesses manufacture products for outdoor recreation, creating jobs, income, and state and local taxes.

4

## Community Wellbeing

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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Photos courtesy  
Montana Department  
of Commerce.

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\$0.93 per copy.

 47.0898° N, 104.7063° W  
THE PARAMOUNT TRAIL AT MAKOSHIKA STATE PARK

