



January 2007 Dr. Norma Nickerson

## Niche News: Montana's Outfitter and Guide Industry

**Research Methods:** *Business Survey* - Outfitter names were obtained from USFS, BLM, NPS, MTFWP, MT Board of Outfitters, Travel MT, MOGA, & FOAM. Duplicates and undeliverables were eliminated identifying 998 active outfitters in Montana in 2005. 33% of outfitters (n=333) returned the mailed business survey. Phone surveys to 70 non-respondents found no difference between respondent/non-respondent outfitters. *Client Survey* - Clients on outfitted trips were either intercepted by researchers or given a survey by the guides and returned by mail. 238 client surveys were returned for the 2006 client study. Client surveys were weighted according to the number and type of clients reported by outfitters to accurately represent all types of outfitted clients.



### OUTFITTED CLIENTS

- 318,600 outfitted clients in 2005**
- 124,000 (39%) - Rafting/floating/canoeing/kayaking
  - 63,800 (20%) - Fishing
  - 48,270 (15%) - Other (Includes birding, snowmobiling, tours, photography, wildlife watching, snowcoach, wagon train, dog sledding, etc.)
  - 45,100 (14%) - Horse trips
  - 19,500 (6%) - Hunting
  - 18,000 (6%) - Hiking/Backpacking

85% of all guided clients are involved in either hunting, angling, rafting/floating, horseback riding, or hiking/backpacking.

**Primary purpose for being in MT (91,000 in MT for the outfitted trip)**

- **Hunters:** 82% of hunters came to MT for the outfitted trip; 16% say it's one part of their trip.
- **Anglers:** 33% of anglers came to MT for the outfitted trip; 43% say it's only one part of their MT trip; 13% say they are here for business and vacation including guided trip; 13% MT residents.
- **All others:** 23% of other activity clients came to MT for the guided trip; 60% say it's only one part of their trip; 8% on business and vacation including guided trip; 10% MT residents.

**\$119.6 million in Client Expenditures** (includes all trip cost, not just outfitted)

- 39% of all expenditures from Hunting (\$46.4 million)
- 31% of all expenditures from Fishing (\$37.2 million)
- 30% of all expenditures from all other trips (\$35.9 million)

### OUTFITTER BUSINESS

- ❖ 48% have some full-time employees (approx. 1,500)
- ❖ 71% have some part-time employees (approx. 4,600)
- ❖ Approx. 4,300 guides in MT
- ❖ 18.25 average # of years outfitting
- ❖ 21.14 average # more years to outfit
- ❖ 7% of outfitters are non-profit (church, scouts, camps, etc.)
- ❖ Over 600,000 client days represented in 2005

% on waterways	% of Trips on Each Type
56% Rivers	55% Forest Service
26% Lakes	48% Other private prop.
19% Reservoirs	31% My private property
	38% State lands
	32% BLM
	13% Nat'l Park Service
	2% Tribal lands

Outfitter Revenues	Outfitter Expenses
43% Hunting	21% Payroll
33% Fishing	14% Contract labor
25% all other activities	12% Food/fuel/equipment
	11% Land leases
	6% Travel
	5% Insurance
	5% Advertising/promotion

### Economic Impact of the Outfitting Industry in Montana

	IMPACTS	Direct	Indirect	Induced	Combined
All Guided Trips	Industry Output	\$110,438,000	\$27,174,000	\$30,021,000	\$167,633,000
	Employment (# jobs)	1,956	276	358	2,590*
	Employee Income	\$37,435,000	\$6,029,000	\$7,972,000	\$51,435,000
	Proprietors' Income	\$4,035,000	\$1,751,000	\$1,632,000	\$7,417,000
	State & Local taxes	\$8,471,000	\$1,283,000	\$1,881,000	\$11,635,000
<i>(Subset of above)</i>					
Guided Hunting Trips	Industry output	\$43,694,000	\$10,800,000	\$12,252,000	\$66,745,000
Guiding Fishing Trips		\$34,221,000	\$8,238,000	\$9,189,000	\$51,649,000
All other Guided Trips		\$32,298,000	\$8,096,000	\$8,513,000	\$48,907,000
<b>Economic Impact based on visitors ONLY in MT because of their guided trip (29% of all trips but 50% of total impact)</b>					
	Industry Output	\$54,638,000	\$13,452,000	\$15,063,000	\$83,153,000

**Definitions:** Direct impacts result from outfitted client purchases of goods and services; Indirect impacts result from purchases made by outfitter related businesses; and Induced impacts result from purchases by those employed in outfitter-related occupations.

\*Does not represent seasonal jobs

**The Institute for Tourism and Recreation Research**

**Exhibit Number: 8**

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