
Montana's Outfitting Industry

Economic Impact and Industry-Client Analysis



Research Report 2007-1
March 2007

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This report was funded by Montana's Lodging Facility Use Tax,
Montana Outfitter and Guides Association & Fishing Outfitters Association of Montana

Executive Summary

The purpose of this study was to assess the current status and future of the outfitting and guiding industry in Montana through an analysis of the economic contribution, a supply side inventory, and the client-guide experiences.

Research Methods: Business Survey – Through analysis of all possible lists of outfitter names in MT, (USFS, BLM, NPS, MTFWP, MT Board of Outfitters, Travel MT, MOGA, and FOAM) 998 active outfitters in Montana were identified for 2005. A business survey resulted in a 33% response rate of outfitters. 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 mail-back survey by their guides. Surveys were returned by 238 clients in 2006. 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 were involved in either hunting, angling, rafting/floating, horseback riding, or hiking/backpacking.

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

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

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 planning to outfit
- ❖ 7% of outfitters are non-profit (church, scouts, camps, etc.)
- ❖ Over 600,000 client days reported in 2005

% on waterways

- 56% Rivers
- 26% Lakes
- 19% Reservoirs

% of trips on each type

- 55% Forest Service
- 48% Other private property
- 31% My private property
- 38% State lands
- 32% BLM
- 13% National Park Service
- 2% Tribal lands

Outfitter revenues

- 43% Hunting
- 33% Fishing
- 25% all other activities

Outfitter expenses

- 21% Payroll
- 14% Contract labor
- 12% Food/fuel/equipment
- 11% Land leases
- 6% Travel
- 5% Insurance
- 5% Advertising/promotion

Economic Impact of the Outfitting Industry in Montana

	<u>IMPACTS</u>	<u>Direct</u>	<u>Indirect</u>	<u>Induced</u>	<u>Combined</u>
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
<u>(Subset of above)</u>					
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

Economic Impact based on visitors ONLY in MT because of their guided trip (28% of all trips but 50% of total impact)

Industry Output	\$54,638,000	\$13,452,000	\$15,063,000	\$83,153,000
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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

Acknowledgements

This study of the outfitting industry in Montana could not have occurred without the help of numerous individuals around the state. We want to thank the following people and their organizations for assistance throughout the study.

Two extremely helpful people and their organizations almost single-handedly made this study operate: Mac Minard, Executive Director of the Montana Outfitter and Guides Association (MOGA) and Robin Cunningham, Executive Director of the Fishing Outfitter Association of Montana (FOAM). Mac and Robin were instrumental in both survey design and contacting outfitters so the survey would be completed by outfitters and their clients. Without their help, expertise, and interest in the industry, this study could not have been completed in a timely manner. MOGA and FOAM also contributed funding for this study.

A number of additional individuals contributed expertise in the survey design and names of the Montana outfitters: Chris Ryan, United States Forest Service; Rob Brooks, Montana Fish Wildlife and Parks; Wayne Johnston, Montana Board of Outfitters; and Chris Miller, Bureau of Land Management.

Of course we have to thank all the outfitters who completed this survey and also those who assisted us with data collection from clients. We know it is difficult to ask your clients to complete a questionnaire, so your help in this endeavor made this study possible.

Finally, we'd like to thank the Tourism Advisory Council (TAC) research committee and the full TAC for approving this project for the state of Montana and all the folks who outfit, guide, or enjoy the services of an outfitted trip.

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DRAFT

Introduction

This report is intended to provide a profile of the outfitting industry in Montana. It combines the results of two surveys, one of outfitter businesses and the other of outfitter clients. The information is presented in four sections. The first section is a review of the outfitting and guiding industry in Montana and other western states.

The second section contains the results of the outfitter business survey including the number of outfitters, employment data, types of trips, number of clients, revenues and expenses. This assessment is the result of a mail-back survey to all known outfitters in the spring of 2006.

The third section of this report contains an assessment of people who participate in guided trips in Montana – the clients. This assessment is the result of intercept surveys conducted by ITRR staff and a mail-back survey given to clients by a random sample of outfitters who represent the diversity of guided trips in the state. Descriptions of clients on guided trips are shown for all clients and then divided into four types of trips: hunting, fishing, rafting/canoeing/kayaking, and backpacking/hiking.

Finally the fourth section contains an analysis of the economic impact of the outfitting industry on Montana. It examines the client-stated expenditures by utilizing the IMPLAN input-output model.

Funding for this research came from Montana's Lodging Facility Use Tax with additional contributions from the Montana Outfitter and Guides Association (MOGA) and the Fishing Outfitters Association of Montana (FOAM). Copies of this report can be downloaded from ITRR's web site (www.itrr.umt.edu) at no charge.

Section 1: The Outfitting Industry in the American West

The antecedents of the modern outfitter are numerous and varied, reaching far back into mythology, allegoric literature, history, and geographic exploration. There are direct historical origins of the outfitter from the 17th and 18th centuries. Throughout history, guides have played two distinct roles, the pathfinder and the mentor. The outfitter of today possesses and expands on both of these roles by allowing the public to have the opportunity to experience activities that they may not be able to experience on their own because of a lack of skills, knowledge, and specialized equipment (Oschell 2004).

Outfitted trips tend to fit the realm of sustainable tourism and ecotourism in its true form. Sustainable tourism in its purest sense is an industry which attempts to make a low impact on the environment and local culture, while helping to generate income, employment, and the conservation of local ecosystems. It is responsible tourism which is both ecologically and culturally sensitive. Ecotourism focuses on local cultures, wilderness adventures, volunteering, personal growth and learning new ways to live on our vulnerable planet (Global Development Research Center 2007).

Ecotourism is considered the fastest growing market in the tourism industry. According to the World Tourism Organization, ecotourism has an annual growth rate of five percent worldwide, representing six percent of the world gross domestic product and 11.4 percent of all consumer spending (Global Development 2007).

Western States Outfitting

The western states provide many natural resources for outfitting and guiding ecotourism businesses to utilize. The National Forests, National Parks, Bureau of Land Management, state lands, and many lakes and streams provide access to a multitude of recreation opportunities. Outfitting businesses vary from state to state. In Montana, by law (Section 37-47-101 of the Montana Code Annotated), an *outfitter* is defined as

“any person... who for consideration provides any saddle or pack animal; facilities; camping equipment; vehicle, watercraft, or other conveyance; or personal service for any person to hunt, trap, capture, take, kill, or pursue any game, including fish; and who accompanies that

person either part or all of the way, on an expedition for any of those purposes or supervises a licensed guide or professional guide in accompanying that person.”

In Montana, outfitter licenses are only required for hunting and fishing trips. This definition does not include guided trips such as whitewater rafting, snowmobiling, hiking, and non-profit activities. Therefore, while a few studies have researched outfitting, they have generally only referred to hunting and fishing.

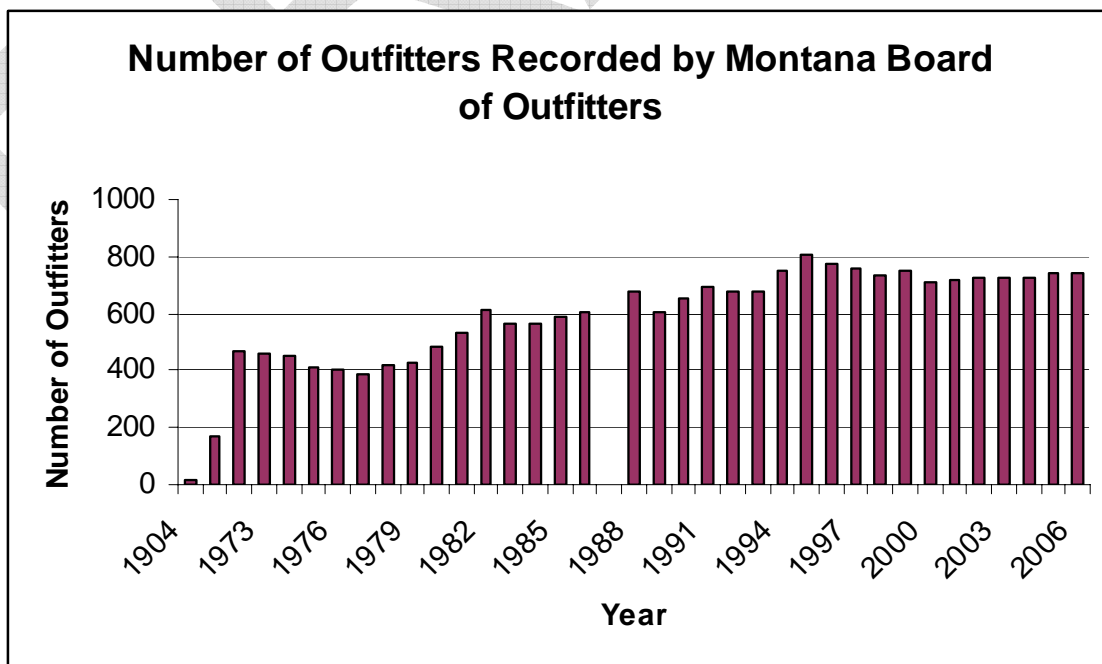
Three previous studies have been conducted about Montana’s outfitting industry, none of which were comprehensive in terms of all outfitting. Two studies were conducted by Taylor and Reilly (1985;1990) and referred to only hunting and fishing outfitted trips. The 1985 study estimated the economic impact of Montana’s outfitting industry as accounting for \$34 million in direct expenditures and a total impact of \$86 million. The 1990 study was a follow-up of the 1985 study but is not available in the public domain. Another study, conducted by Adams (2000), was commissioned by the Montana Wilderness Association and concentrated on outfitting on Montana’s roadless public lands. That study estimated there were 306 wildland outfitters in Montana who generated \$107 million in economic activity in Montana and created 4,336 jobs. Each outfitter-related study in Montana has been conducted with different methodologies and different population sets making comparisons impossible.

In Idaho, only one study was found related to outfitting. A 1993 study by Leidner and Krumpe (1995) researched the economic contributions of Idaho’s outfitters and guides. It was found that the total gross revenue attributed to outfitting and guiding activities in Idaho exceeded \$22 million and was comprised of 374 small businesses around the state. No studies in Idaho have been conducted since 1993 to update this information. Wyoming, Utah, and Colorado have not conducted similar studies on their outfitting industry.

While research studies about the industry are few, identifying the numbers of outfitters in the western states is even more difficult. Montana, Wyoming and Idaho appear to have data on number of outfitters, but even these data sets are not comprehensive of the array of outfitting activities.

The Montana Board of Outfitters has historical records of the number of outfitters dating back to 1904. In that year, 14 outfitters were documented by the Board. No data exists for years 1905-1954 but in 1955 there were 173 outfitters operating in Montana. There is another lapse in recording from 1956 through 1971 but beginning in 1972, consistent numbers are available. The general trend in the number of outfitters from 1972 until present day continues to grow, but there are definite fluctuations from year to year. In 2006, there were 744 licensed outfitters in the state of Montana (MT Board of Outfitters 2007).

Figure 1: Outfitters in Montana



According to Simons (2007) of the Idaho Outfitter and Guides Association, 222,286 clients were guided in Idaho in 2006. The number of clients and their type of activity are as follows: All boating, power and float trips - 133,475 clients; fishing trips - 16,151 clients; fishing and boating – 47,058 clients; recreation activities without fishing – 25,602 clients; all hunting – 6,430 clients. While the number of clients was available from Idaho, the number of outfitters was not available. In Wyoming, the latest available data reflects 367 outfitters in 2002 who outfitted 9,721 hunters (Wyoming State Board 2007).

Much of the reason for a lack of updated outfitter information and numbers in each state is revealed by the differences in state laws and regulations. Rules and regulations that govern outfitters vary widely from state to state. In Montana, licenses given by the Montana Board of Outfitters are required for all outfitters offering hunting and fishing trips but no other type of guided trip. In Utah, licenses are required to lead hunting trips for big game, cougar, or bear. Utah also requires river guide permits for guides operating rafting trips while outfitting companies need only to register. Colorado requires licenses for outfitted hunting and fishing trips, but, similar to Utah, requires separate licenses for river rafting that are obtained through the Colorado Division of Parks and Recreation. Wyoming requires licenses only for hunting outfitters while Idaho requires a license for any outfitted service offered with the exception of wagon and sleigh rides.

Like Montana, the other four western states (Idaho, Wyoming, Utah, and Colorado) have outfitter/guide associations. However, each association is unique in what they do and what they offer. Each association has a website and will provide lists of licensed outfitters in the state. Some states have statistics readily available while others have less information.

The outfitting industry in the western United States is a viable industry but is hard to understand in terms of requirements, total outfitter numbers within each state, and understanding economic contributions the industry provides. It is not apparent that any of the states listed have recently completed a study that would allow them to fully understand the economic impact of outfitting to their state. This report provides a unique and progressive look at the outfitting industry in Montana by providing information on all types of outfitted trips.

Study Purpose

Updated information on the characteristics and impacts of the outfitting and guiding industry in Montana is needed. It has been shown that the outfitting industry in Montana has referred to only those activities where licenses were required by the client – hunting and fishing. In the past 25 years, outfitting and guiding has expanded to include a multitude of activities such as rafting, hiking, biking, photography tours and so forth. This study provides a comprehensive look at outfitting in Montana.

The purpose of this study was to assess the current status of the outfitting and guiding industry in Montana through an analysis of the characteristics of the industry and its economic contribution to the state. To address this purpose, the following objectives were developed. These objectives are:

Objective 1: To estimate the number of outfitters and guides working in the state of Montana.

Objective 2: To inventory the number and type of trips provided by outfitters and guides.

Objective 3: To identify client demographics and outfitted trip characteristics.

Objective 4: To analyze the experiences gained by taking an outfitted trip.

Objective 5: To estimate the economic impact of the MT outfitting/guiding industry on Montana's economy.

Through this analysis, a more accurate characterization of the industry is possible. It provides planners, business owners, and legislators with a picture of how outfitting and guiding fits into Montana's growing nature-based tourism industry. This knowledge also informs the decision-making process and helps the public understand not only the role that outfitters and guides play in the economy of Montana, but the need for conservation of the state's public land and natural resources.

Section 2: The Outfitting Business

Methodology

To address the outfitter-side objectives of this study, a survey instrument was designed based on a survey previously used by Taylor and Reilly (1985). Staff from the Forest Service; the Bureau of Land Management; Montana Fish, Wildlife, & Parks; the Montana Board of Outfitters; the Montana Outfitter & Guide Association (MOGA); and the Fishing Outfitter Association of Montana (FOAM) contributed to the development of the survey. Changes to the original survey included additional demographic information, additional activity type categories, and revised revenue and expenditure questions. See Appendix A for the complete survey.

The initial mailing was a census of all outfitters in the state. This population was compiled from mailing lists provided by the Forest Service; Bureau of Land Management; Montana Fish, Wildlife, & Parks; Montana Board of Outfitters; and Travel Montana. These lists consisted of both for profit and not-for-profit organizations that applied for special use permits on public lands, were registered with the Montana Board of Outfitters, or advertised themselves as outfitters through the state of Montana's travel promotion agency. These lists resulted in an initial population of 1,154 outfitters.

Surveys were distributed using Dillman's Tailored Design Method (2000). Respondents were first mailed a letter describing the purpose of the study. This letter was followed by letters of support from MOGA and FOAM to its membership. The survey instrument was then mailed to the entire population a week later. One week after the delivery of the survey instrument, a reminder/thank you postcard was sent to each respondent. Finally, two weeks after the postcard, a second copy of the survey instrument and a cover letter was sent to those participants who had not yet responded.

Respondents no longer in business or those who did not guide clients were removed from the population along with undeliverables, leaving a total population of 998 outfitting organizations in Montana. Of these organizations, 333 surveys were returned for a response rate of 33 percent. Due to the length of the survey and the personal nature of the revenue and expenditure questions asked of respondents, this response rate was considered acceptable.

A telephone non-response bias check was also conducted to determine if survey respondents were representative of the outfitting industry. Seventy non-respondents were contacted and asked questions regarding number of clients, client days, and types of services provided. Independent sample t-tests were conducted using SPSS statistical software to determine if non-respondents were significantly different from respondents. The tests indicated no significant differences between non-respondents and respondents at the 95 percent confidence level. It therefore can be assumed that respondents to the survey are representative of the outfitting industry and results can be projected for the entire industry.

Table 1: Outfitter Business Survey Sample Size and Response Rate

Questionnaires mailed	1,154
Outfitters no longer in business and undeliverable surveys	156
Total number of Montana Outfitters	998
Surveys returned	333
Outfitter response rate	33%

A Profile of Outfitters in Montana

This section presents a profile of Montana outfitters as they described their 2005 outfitting business. The outfitter profile includes a basic description of Montana outfitters followed by a discussion of their revenues and expenses.

Outfitting Business Description

In 2005, there were 998 known outfitters in the state of Montana and approximately 4,300 guides. On average, outfitters have been in business 18 years and expect to continue in business for an average of 21 more years. Montana's outfitting business is mostly for-profit as only six percent indicated their business was non-profit. Non-profit organizations generally included church, scouting, and educational groups. The "average" outfitter took 323 clients on an outfitted trip in 2005. The maximum number of clients for one outfitter business was 10,322 in one year.

Outfitters estimated that 88 percent of their clients were non-residents of Montana. A further analysis of where clients were from appears in the "Outfitted Clients" section.

Table 2: Characteristics of the Outfitting Business

	All Outfitting
Percent of outfitters in for-profit business	93%
Years in the business of outfitting	
Mean	18.25 years
Range	1 - 76 years
More years expecting to continue to outfit	
Mean	21.14
Range	0 – 100 years
Number of clients	
Mean	323
Range	1 - 10,332
Number of client days	
Mean	602
Range	0 - 13,050
Percent of clients from out-of-state	
Mean	88%
Range	0-100%

The outfitting business consists of small entrepreneurs. Twenty-four percent do not have any employees and only 42 percent of those have some contract labor. This means nearly one-fourth of all outfitters are self-employed with no help. Of the 48 percent of outfitters who have full-time employees, most have one or two full time staff. Seventy-one percent of the outfitters hire part-time staff with an average of nearly five part-time workers per outfitting business. Most of the part-time staff function as guides for the outfitter.

Table 3: Employment Profile

Full-Time Employees			
Full-time mean # of employees	1.94	Range of full-time employees	0 - 30
% with Full-Time Employees			
0 full-time employees	52%	4 full-time employees	4%
1 full-time employee	14%	5 full-time employees	3%
2 full-time employees	11%	6 full-time employees	4%
3 full-time employees	6%	7 or more full-time employees	5%
Part-Time Employees			
Part-time mean # of employee	4.93	Range of Part-time employees	0-70
% with Part-Time Employees			
0 part-time employees	29%	4 part-time employees	10%
1 part-time employee	7%	5 part-time employees	5%
2 part-time employees	9%	6 part-time employees	7%
3 part-time employees	9%	7 or more part-time employees	22%
Guides			
Guides - mean #	4.86	Range of # of Guides	0-50
% with Guides as Employees			
0 employee guides	23%	7-8 employee guides	8%
1-2 employee guides	19%	9-10 employee guides	7%
3-4 employee guides	22%	More than 10 employee guides	10%
5-6 employee guides	13%		

Outfitted trips occur on various lands. Fifty-five percent of outfitters guide on United States Forest Service land followed by 48 percent who guide on private land not personally owned. In terms of water-related trips, most occur on rivers (56%) followed by 26 percent on lakes.

Table 4: Types of Land and Water for Outfitted Trips

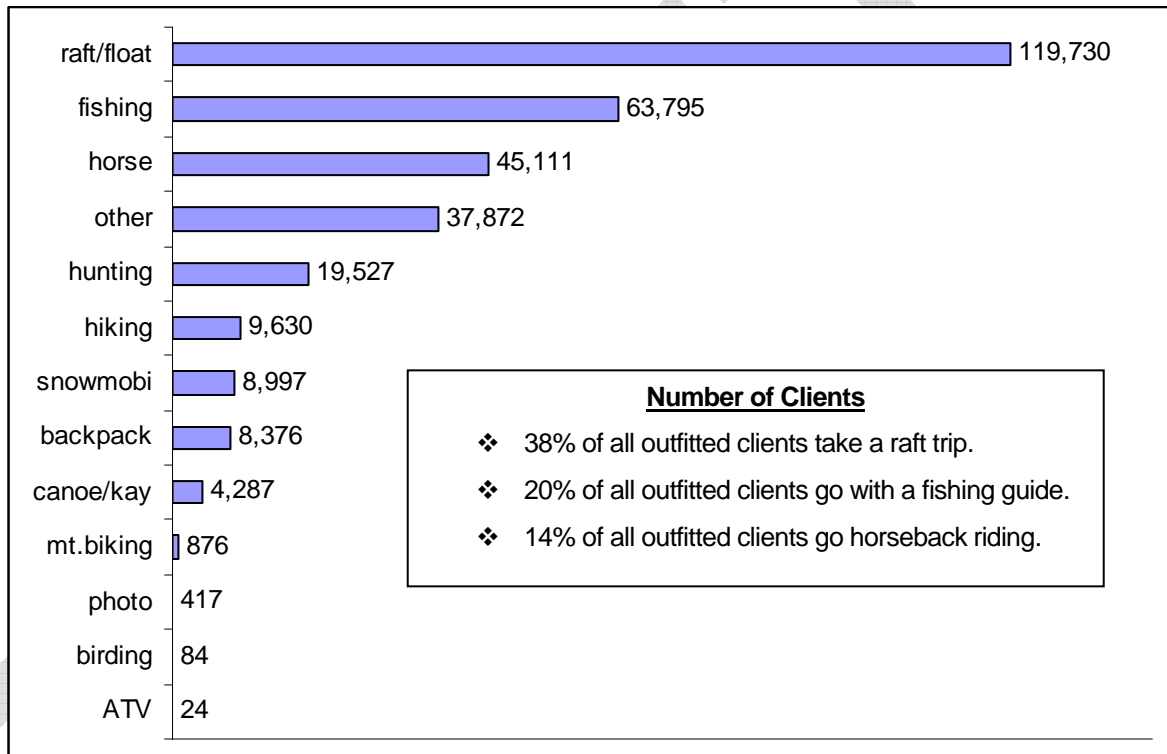
Percent of trips on land types	All Outfitting
Forest Service	55%
Private property (not outfitters')	48%
State lands	38%
BLM	32%
Private property (outfitter owned)	32%
National Park	13%
Tribal lands	2%
Percent of trips on water types	
Rivers	56%
Lakes	26%
Reservoirs	19%

Business Operations

Eighty-five percent of all guided clients are involved in hunting, angling, rafting/floating/canoeing/kayaking, horseback riding, or hiking/backpacking. The total number of guided clients in 2005 was slightly over 318,600. The type of activity engaged in on guided trips correlates with trip length. Hunting trips are the longest type of guided trip at nearly 5 days followed by backpacking/hiking trips at 3.8 days. The shortest trip type are rafting/kayaking/canoeing/kayaking trips at 1.4 days.

Table 5: Clients and Client Days by Activity Type

Activity	# of Clients	% of total outfitted clients	Total Clients Days	Average Trip Length
Hunting	19,500	6%	96,560	4.95 days
Fishing	63,800	20%	120,100	1.88 days
Horseback trips	45,100	14%	70,830	1.57 days
Rafting/floating/canoeing/kayaking	124,000	39%	179,680	1.44 days
Backpacking/hiking	18,000	6%	68,980	3.8 days
Other (Mountain biking, Snowmobiling, ATV, Bird watching, Photography, wagon rides, dog sledding, tours, etc)	48,270	15%	91,840	1.9 days
TOTAL	318,670	100%	627,990	

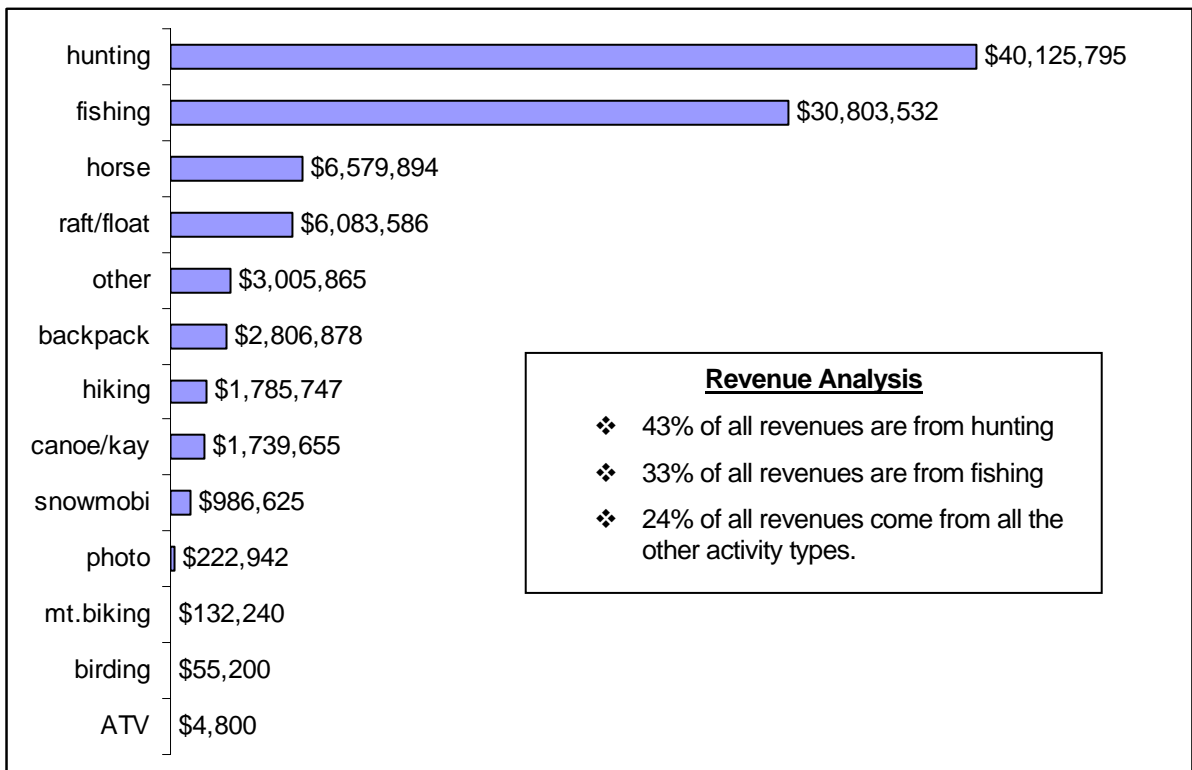
Figure 2: Number of Outfitted Clients by Activity (2005 estimate)

Outfitters receive the most revenues from hunting and fishing activities followed by the water activities of rafting/floating/canoeing/kayaking. Even though the number of hunting clients is low compared to other activities for guided trips, the revenue received is the highest.

Table 6: 2005 Outfitter Revenue by Activity

Revenue from Activity Type	% of Outfitters Receiving Revenue	Mean Revenue by Activity	% of Total Outfitter Revenues
Hunting	42%	\$88,000	43%
Fishing	49%	\$63,380	33%
Horseback trips	16%	\$39,880	7%
Rafting/floating/ canoeing/kayaking	14%	\$52,020	6%
Backpacking/hiking	9%	\$47,360	3%
Other (Mountain biking, Snowmobiling, ATV, Bird watching, Photography, wagon rides, dog sledding, tours, etc)	14%	\$34,600	8%

Figure 3: Estimated Statewide Outfitter Revenues by Activity (2005)



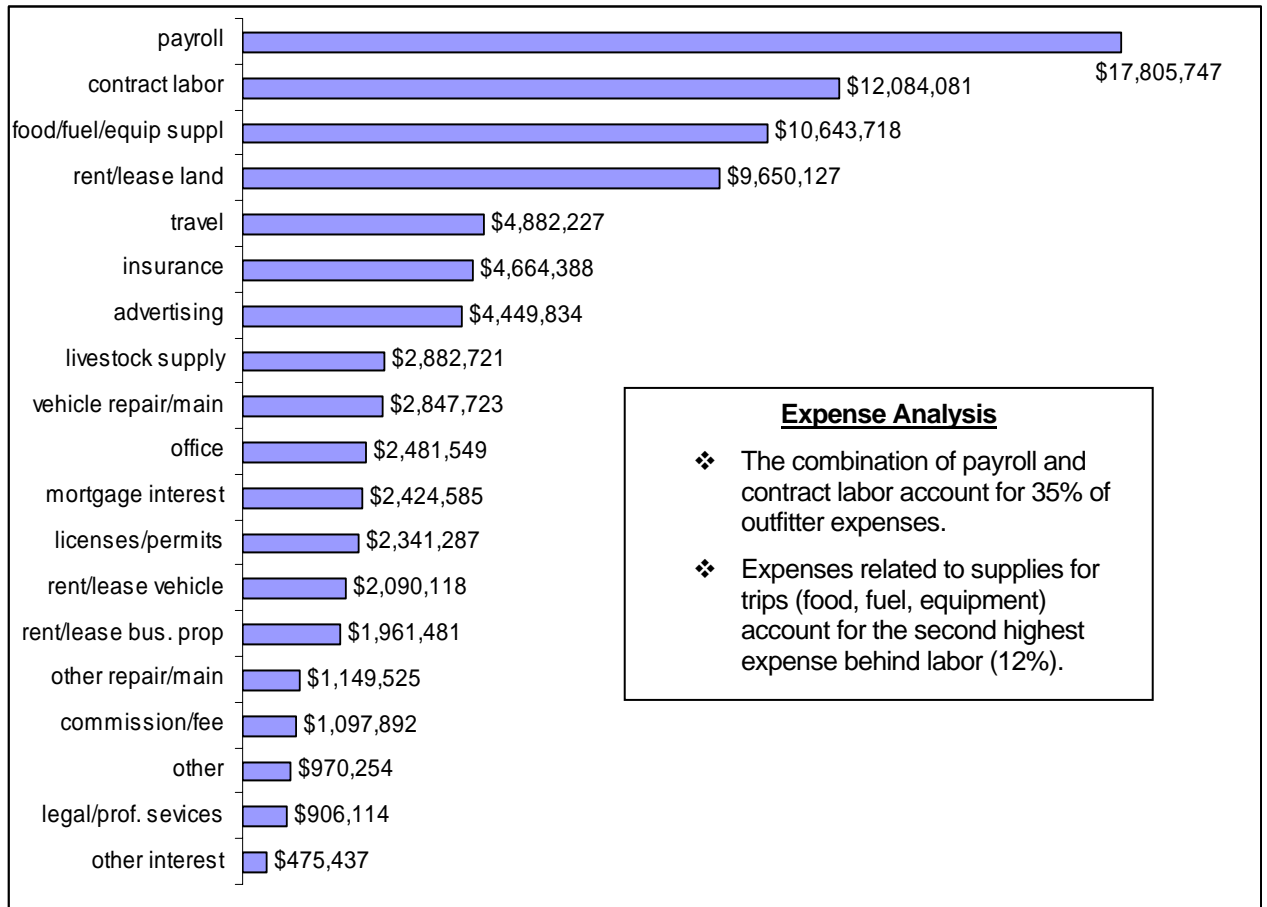
Expenses paid for by outfitters vary from an average low of \$1,810 for legal and professional services to an average high of \$36,640 on payroll. As in all service industries, payroll is the highest portion of a business' expenses. Outfitters pay 21 percent of their expenses to payroll followed by 12 percent for food, fuel, and equipment supplies and 11 percent for land leases.

Table 7: 2005 Outfitter Expenses

Activity	% of Outfitters with the Expense	Average Expense by Outfitter	% of Total Outfitter Expenses
Insurance (liability, vehicle, property)	85%	\$5,490	5%
Licenses and permits	84%	\$2,790	3%
Advertising (printing, web sites, trade shows)	71%	\$6,280	5%
Food, fuel, equipment supplies	70%	\$15,230	12%
Vehicle repair and maintenance	68%	\$4,200	3%
Office expenses	66%	\$3,760	3%
Travel (food, gas, lodging)	63%	\$7,750	6%
Legal and professional services	50%	\$1,810	1%
Payroll (not including FICA, workers' comp., unemployment taxes)	49%	\$36,640	21%
Contract labor	49%	\$24,860	14%
Land leases	37%	\$26,150	11%
Other repair and maintenance	33%	\$3,480	1%
Livestock related expenses	31%	\$9,330	3%
Rent or lease vehicles, machinery, equipment	28%	\$7,490	2%
Commission and fees	26%	\$4,200	1%
Mortgage interest	24%	\$10,100	3%
Rent or lease other business property	17%	\$11,470	2%
Other interest	14%	\$3,370	1%
Other expenses	4%	\$24,890	1%

More outfitters (85%) pay insurance for liability, vehicle, and property than for any other expense. The second most frequent expense goes to licenses and permits (84% of outfitters have this expense).

Figure 4: Estimated Statewide Outfitter Expenses



Profit and Loss

According to the results of this study, it appears outfitters are not in this business for the money. Twenty-three percent of the outfitters indicated their expenses were higher than their revenues with an average loss of \$26,100. Without further detail on each outfitter and their declared loss, it is impossible to precisely determine why. However, it is possible to show a business loss for tax purposes and still be in business.

Outfitters who indicated making a profit averaged \$29,320 for the year. Those with no employees have an average profit of \$8,940.

Section III: Outfitted Clients

Methodology

To address the client-side objectives of the study, a survey instrument was designed to capture information related to client demographics, type of outfitted trip, expenditures while in Montana, and experiences gained on the guided trip. The client expenses section of the survey was based on nonresident surveys conducted by the Institute for Tourism and Recreation Research (Institute, 2005a) and the survey previously used by Taylor and Reilly (1985). The experiences section of the survey was adapted from numerous survey instruments (Davenport, et.al., 2004; Manfredo, et.al 1996; Oschell 2004). See Appendix B for the complete survey.

Because the outfitter business survey revealed five primary activity types accounting for 85 percent of all outfitted clients in Montana, these trip types were the focus of the client survey. The outfitted trips included hunting, fishing, rafting/floating/canoeing/kayaking, horseback trips, and backpacking/hiking. Surveys related to clients and outfitted trips were conducted in the summer and fall of 2006.

A stratified sample design was based on activity type and travel region of Montana in order to estimate trips throughout the state. Clients on outfitted trips were given questionnaires to complete on-site by two methods. One method utilized the outfitter and guides to hand the questionnaire to the client upon completion of the trip. Sample outfitter businesses were selected based on the six travel regions of the state (Glacier, Russell, Gold West, Custer, Yellowstone, & Missouri River). From these regions, one outfitter/guide business was selected per activity to represent each of the five primary activity types. In regions where a given activity was not conducted, a selection was re-allocated to another region. The client filled out the survey, sealed it in an envelope, and then gave it to the outfitter to mail in one package with all the other questionnaires. In some instances, the client placed the individually completed surveys directly in the mail.

The second method of data collection was conducted by ITRR staff who intercepted clients upon completion of their trip (with permission from the outfitter). Clients completed the survey and immediately handed the survey back to the researcher. A total of 238 client surveys were completed for the study.

A Profile of Clients on Outfitted Trips in Montana

Clients on guided trips were asked about demographic information, trip characteristics, expenses and experiences. The following description of clients is presented for all clients together and then divided by clients on four specific trip types: hunting; fishing; rafting/canoeing/kayaking; and backpacking/hiking. Sample sizes within three of the activity types (all but hunting) are quite low, therefore the reader should be cautious when interpreting results.

Respondent Demographic Characteristics

The demographics of people who take guided trips in Montana reveal some interesting differences based on the type of guided trip activity. The person's age, gender, and household income show varying trends. In general, females are most prominent in the rafting/canoeing/kayaking guided trips. The average age of backpacking/hiking trips is lower than all other trips, and clients who are fishing and hunting tend to have higher income levels.

Montana residents participate in rafting/canoeing/kayaking trips as well as fishing trips, but do not take guided hunting trips. People from the eastern half of the United States tend to dominate the guided hunting trips.

Figure 5: Income Levels of Clients on Guided Trips

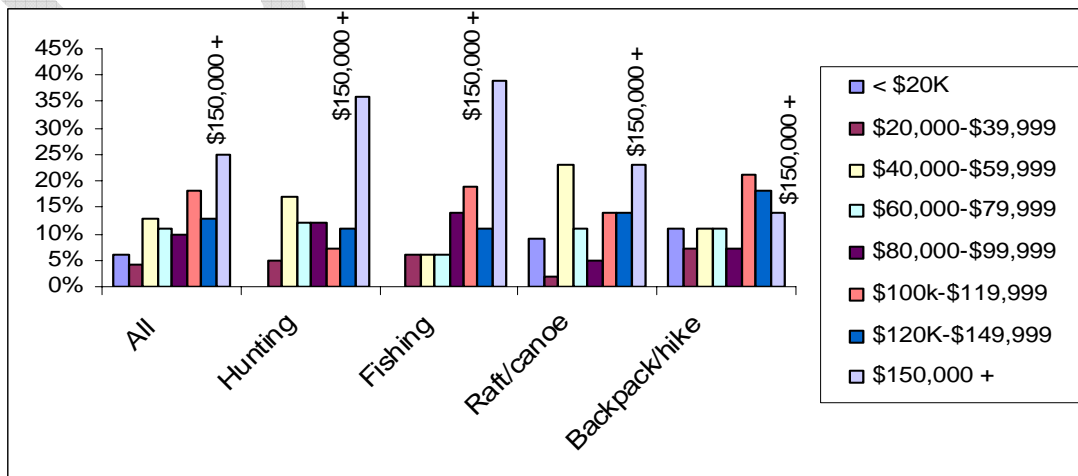


Table 8: Respondent Demographic Characteristics by Primary Activity Type

	All Outfitted Clients (N=238)	Hunt (n=102)	Fish (n=40)	Raft/canoe/ Kayak (n=48)	Backpack/ Hike (n=32)
Where from	36 states, Canada, Belgium, <u>New Zealand</u>	26 states, New <u>Zealand</u>	<u>17 states</u>	18 states, Alberta, <u>Manitoba</u>	<u>18 states</u>
	10% WA & MT, 8% FL, 7% MN, 6% CA, 5% CT & VA, 4% TX	15% VA, 11% PA, 10% GA, 7% FL, 5% MN & WI	18% WA, 15% CA, 13% MT, 8% VA & IL	20% MT, 13% WA, 11% FL, 9% TX, 7% CA, 4% MN	16% CT, 10% CO, FL, & MN, 6% VA, NM, & NC
Average respondent age	46.8	50.2	52.7	46.6%	42.7
% Male respondents	63%	97%	80%	49%	61%
Household income					
< \$20K	6%	0%	0%	9%	11%
\$20,000-\$39,999	4%	5%	6%	2%	7%
\$40,000-\$59,999	13%	17%	6%	23%	11%
\$60,000-\$79,999	11%	12%	6%	11%	11%
\$80,000-\$99,999	10%	12%	14%	5%	7%
\$100k-\$119,999	18%	7%	19%	14%	21%
\$120K-\$149,999	13%	11%	11%	14%	18%
\$150,000 +	25%	36%	39%	23%	14%

Guided Trip Group Characteristics

Characteristics of clients on guided trips vary among the type of trip taken. On average, 28 percent of clients are in Montana because of the guided trip experience. However, when looking at the activity type, 82 percent involved in hunting and 52 percent involved in backpacking/hiking guided trips are in Montana *because* of the guided trip.

The length of the guided trip is longest for hunting (6.26 nights) and shortest for rafting/canoeing/kayaking (0.7 nights). The length of time in Montana shows that those on backpacking/hiking guided trips spend the longest time in the state (8.57 nights) which is slightly higher than hunting clients who spend 8.43 nights in Montana.

Group size and group type differs by activity type. The hunting group size is 2.7 and 40 percent are hunting with friends compared to the rafting/canoeing/kayaking group size which is 5.58 and 37 percent are on the trip with their immediate family. The youngest age group (0-10) is highest among rafting/canoeing/kayaking trips and non-existent in backpacking/hiking trips. The 11-17 year olds are more likely to be included in backpacking/hiking than any of the other activity types. The oldest age group (65 or older) is more likely to be on fishing trips followed by rafting/canoeing/kayaking.

When comparing clients on outfitted trips in Montana to the average Montana vacationer (Grau & Nickerson 2006), some differences come to light. First of all, the average Montana vacationer stays 6.02 nights in Montana while outfitted clients spend 6.94 nights. Group size for the Montana vacationer is 2.59 compared to 4.79 for those on guided trips. Finally, couples represent the highest portion of vacationers (37%) but for groups on guided trips, couples only represent nine percent of the travel group type.

Table 9: Client Trip Characteristics

Guided Trip Characteristics	All Outfitted Clients (N=238)	Hunt (n=102)	Fish (n=40)	Raft/canoe/ Kayak (n=48)	Backpack/ Hike (n=32)
Reason for Being in MT					
Came to MT for guided trip	28%	82%	33%	2%	52%
Guided trip is one portion of MT vacation	54%	17%	43%	66%	45%
In MT for business and vacation	8%	1%	12%	15%	0%
I am a MT resident	10%	0%	12%	17%	3%
Average length of guided trip	2.95 nights	6.26 nights	2.91 nights	0.7 nights	5.41 nights
Average nights in MT	6.94 nights	8.43 nights	6.71 nights	5.77 nights	8.57 nights
Average travel group size	4.79	2.7	4.36	5.58	4.54
Age groups represented on guided trip					
0-10	15%	4%	8%	27%	0%
11-17	41%	3%	13%	46%	56%
18-24	27%	7%	8%	27%	47%
25-34	32%	13%	20%	35%	44%
35-44	42%	40%	40%	42%	41%
45-54	58%	60%	40%	56%	75%
55-64	32%	42%	28%	35%	34%
65+	21%	6%	36%	25%	12%
Travel group Type					
Self	10%	21%	14%	2%	23%
Couple	9%	8%	16%	9%	7%
Immediate family	36%	14%	22%	37%	36%
Extended family	8%	5%	5%	11%	3%
Family & friends	16%	11%	14%	17%	23%
Friends	12%	40%	16%	11%	7%
Business associates	7%	1%	14%	11%	0%
Organized group/club	3%	1%	0%	4%	3%

Client Expenditures

Clients on guided trips in Montana spent, on average, \$2,891 while in the state. Looking at expenditures by guided activity type, money spent in Montana ranged from \$10,695 for those on guided hunting trips to \$1,066 for those on rafting/canoeing/kayaking trips. According to the Institute for Tourism and Recreation Research (Grau 2006), vacationers spend \$183.37 per day for 6.02 days or \$1,103.89 per Montana visit. All guided trip clients except for those on rafting/canoeing/kayaking guided trips exceeded the average vacationer expenditures. It is likely that rafting/canoeing/kayaking folks spent less because this group had the highest number of Montana residents partaking in the activity.

Clients on guided rafting/canoeing/kayaking trips and guided fishing trips spent more of their dollars on accommodations while clients on all other guided trips had their highest expenditure on the cost of the guided trip itself.

Table 10: Average Montana Trip Expenditures by Those Who Take a Guided Trip

Montana Guided Trip Visitor Expenditures	All Outfitted Clients (N=238)	Hunt (n=102)	Fish (n=40)	Raft/canoe/ Kayak (n=48)	Backpack/ Hike (n=32)
Average Length of Stay in MT	6.94 nights	8.43 nights	6.71 nights	5.77 nights	8.57 nights
Overnight accommodations	\$530.11	\$326.29	\$1,212.88	\$337.66	\$182.97
Gasoline, oil	\$121.44	\$214.58	\$93.79	\$124.95	\$83.18
Restaurant, bar	\$183.57	\$177.72	\$218.61	\$191.02	\$120.57
Groceries, snacks	\$81.66	\$96.21	\$73.62	\$72.46	\$62.32
Auto or RV rental, repair	\$144.31	\$386.33	\$260.15	\$31.21	\$119.25
Retail goods (e.g. souvenirs, gifts, photos, etc.)	\$113.54	\$208.58	\$176.11	\$77.33	\$75.90
Permits, entrance fees	\$40.73	\$414.58	\$55.65	\$19.50	\$22.27
Outdoor gear (e.g. ammo, tackle, clothes)	\$122.71	\$227.17	\$165.75	\$16.31	\$150.56
Licenses	\$183.79	\$1,105.04	\$91.19	\$9.79	\$20.50
Guided trip costs	\$1,038.96	\$5,872.74	\$956.62	\$163.43	\$1,197.80
Tips to guides/outfitters	\$153.96	\$605.84	\$199.17	\$21.04	\$130.50
Taxidermy	\$120.24	\$782.96	\$1.00	\$1.00	\$1.00
Freezers/game processing	\$54.37	\$273.42	\$1.00	\$1.00	\$1.00
Other	\$2.40	\$4.87	\$0.13	\$0.25	\$7.94
TOTAL MT Trip Expenditures	\$2,891.41	\$10,695.33	\$3,505.67	\$1,066.95	\$2,176.76

Recreation Experience Outcomes on Guided Trips

Clients provided details about their guided trip by completing questions related to what they experienced on the trip. This section of the survey is intended to help outfitters understand what their clients are getting out of their trips. These scales have been used in various contexts to understand the experiences of recreationists.

Thirty-one questions representing seven types of experiences were asked on a 6-point scale where -3 = strongly disagree and +3 = strongly agree. Because answers were recoded (-3 =1, -2 =2, -1 =3, 1=4, 2=5, 3=6), any mean score less than four indicated a disagreement with the statement.

The top three experiences within all four groups of clients (hunting, fishing, rafting/canoeing/kayaking, and backpacking/hiking) were the same albeit in different order. These experiences were: feeling close to nature, enjoyed the smells and sounds of nature, and experienced excitement. The fourth and fifth highest rated experience outcomes differed within each group and related to the activity engaged in by that group as is highlighted in Table 11.

Table 11: Top Recreation Experiences by Guided Trip Activity

Hunters were in the highest agreement with the following statements: On this guided trip I...

1. Was close to nature	5.69
2. Enjoyed the smells and sounds of nature	5.65
3. Experienced excitement	5.58
4. Was where things are natural	5.53
5. Had thrills	5.45

Hunters disagreed with only one statement: On this guided trip I chanced dangerous situations (3.27).

Anglers were in the highest agreement with the following statements: On this guided trip I...

1. Enjoyed the smells and sounds of nature	5.54
2. Was close to nature	5.41
3. Experienced excitement	5.31
4. Became better at this activity	5.16
5. Experienced peace and calm	5.11
6. Developed my skills and abilities	5.11

Anglers disagreed with three statements: On this guided trip I... took risks (3.45); avoided the unexpected (3.44); chanced dangerous situations (3.06).

Rafters and floaters were in the highest agreement with the following statements: On this guided trip I...

1. Enjoyed the smells and sounds of nature	5.43
2. Experienced excitement	5.41
3. Was close to nature	5.24
4. Had thrills	5.17
5. Felt exhilaration	5.13

Rafters/Canoers/kayakers disagreed with more statements than any of the other activity groups: On this guided trip I... Experienced solitude (3.95); Thought about who I am (3.95); Thought about my personal values (3.860); and, avoided the unexpected (3.43).

Backpackers and hikers were in the highest agreement with the following statements: On this guided trip I...

1. Was close to nature	5.53
2. Experienced excitement	5.41
3. Enjoyed the smells and sounds of nature	5.38
4. Gained a better appreciation of nature	5.31
5. Explored the area	5.31

Backpackers and hikers did not disagree on any of the stated experiences.

Table 12: Guided Trip Experience

On this Guided trip I.....	All Outfitted Clients (N=238)	Hunt (n=102)	Fish (n=40)	Raft/canoe/ Kayak (n=48)	Backpack/ Hike (n=32)
Scale: (1=Strongly Disagree, 6= Strongly agree)			Mean		
Enjoyed the smells and sounds of nature	5.50	5.65	5.54	5.43	5.38
Was close to nature	5.42	5.69	5.41	5.24	5.53
Experienced excitement	5.37	5.58	5.31	5.41	5.41
Was where things are natural	5.20	5.53	5.08	5.08	5.25
Had thrills	5.14	5.45	4.95	5.17	5.25
Became better at this activity	5.10	5.33	5.16	4.97	5.23
Felt exhilaration	5.09	5.13	5.05	5.13	5.16
Experienced new and different things	5.06	5.15	4.84	5.12	5.19
Gained a better appreciation of nature	5.06	5.30	5.00	4.90	5.31
Discovered something new	5.05	5.19	5.03	5.05	5.19
Experienced peace and calm	5.01	5.43	5.11	4.78	5.22
Explored the area	4.96	5.38	4.53	4.79	5.31
Learned more about nature	4.87	5.15	4.74	4.55	5.28
Gained a sense of self-confidence	4.82	4.90	4.70	4.71	5.13
Developed my skills and abilities	4.82	5.05	5.11	4.63	4.97
Showed myself I could do it	4.76	4.98	4.32	4.60	5.25
Tested my abilities	4.73	5.08	4.62	4.53	5.06
Experienced tranquility	4.69	5.18	4.85	4.19	5.06
Experienced quiet	4.67	5.37	4.87	4.05	5.22
Developed a sense of self pride	4.66	4.95	4.43	4.49	5.00
Studied nature	4.54	5.01	4.34	4.30	5.10
Learned more about myself	4.54	4.66	4.31	4.26	5.13
Experienced the risks involved	4.52	4.39	3.82	4.64	5.13
Experienced solitude	4.51	5.20	4.76	3.95	4.94
Learned what I was capable of	4.50	4.89	4.16	4.35	4.94
Thought about my personal values	4.34	4.98	4.24	3.86	4.84
Thought about who I am	4.34	4.66	4.03	3.95	5.06
Took risks	4.24	3.48	3.45	4.39	4.87
Was sure of what would happen to me	4.14	4.59	4.16	4.17	4.19
Chanced dangerous situations	3.99	3.27	3.06	4.18	4.50
Avoided the unexpected	3.79	4.33	3.44	3.43	4.23

Over the years, factor analysis conducted on these variables have shown that seven basic concepts emerge (Manfredo et.al 1996). The concepts below are represented by the following variables (statements):

Enjoy Nature= to be close to nature, to enjoy the smells and sounds of nature, to be where things are natural

Learning= to experience new and different things, to discover something new, to explore the area, to study nature, to learn more about nature, to gain a better appreciation of nature

Achievement/Stimulation= gain a sense of self confidence, develop a sense of self pride, to show yourself you could do it, to become better at the activity, to develop skills and abilities, to test your abilities, to learn what you are capable of, to have thrills, to experience excitement, to feel exhilaration.

Tranquility= to experience tranquility, to experience solitude, to experience the peace and calm, to be where it is quiet

Introspection= to think about your personal values, to think about who you are, to learn more about yourself

Risk Reduction= to be sure of what will happen to you, to avoid the unexpected

Risk Taking= To take the risks, to chance dangerous situations, to experience the risks involved

Figure 6: Mean scores for Recreation Experience Outcomes by Activity Type

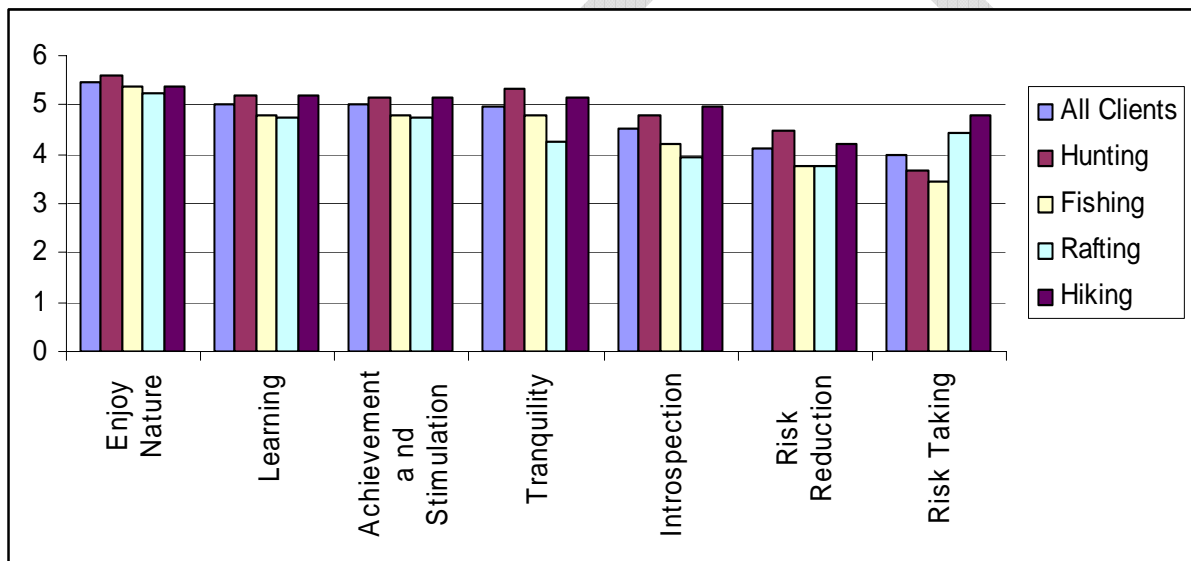


Figure 6 represents the concepts described above, and the means are compared across activity type. As shown, differences emerge across the type of guided activity. For example, while all guided trips were similarly high on the experience of enjoying nature, risk taking was not an experience by anglers but was for those hiking. Also, hikers were quite high in introspection but those on guided raft trips were not as likely to experience introspection.

Section IV: The Economic Impact of Montana's Outfitting Industry

This section addresses the estimation of the economic impact of the MT outfitting/guiding industry on Montana's economy – the final objective of the study. This objective was met through use of the economic input-output model, IMPLAN.

Input-output accounting describes commodity flows from producers to intermediate and final consumers. The total industry purchases of commodities, services, employment compensation, value added, and imports are equal to the value of the commodities produced. Purchases for final use (final demand) drive the model. Industries produce goods and services for final demand and purchase goods and services from other producers. These other producers, in turn, purchase goods and services. This buying of goods and services (indirect purchases) continues until leakages from the region (imports and value added) stop the cycle (Lindall & Olson, 2007).

For this study clients were asked to report expenditures incurred in Montana during their trip. Thirteen categories plus an 'other' category comprised the expenditure list as shown in the previous section of this report. These numbers were entered into the IMPLAN model to generate the total economic impact of the outfitting industry in Montana.

Economic Contribution of Outfitted Trips in Montana

According to The Institute for Tourism and Recreation Research (Grau, 2006), the nonresident travel industry in Montana had a direct economic impact of \$2.6 billion in 2005. Five percent of all nonresident visitors to Montana indicated they hired an outfitter or guide while visiting the state (Rademaker & Nickerson, 2006). Direct comparisons can be difficult to make between the ITRR nonresident study and the outfitter study since different methodologies were employed. However, the outcomes in terms of economic impact are very similar. The ITRR nonresident study was a full year intercept research project. The outfitter study of the clients was conducted June through November. The ITRR study indicated that five percent hired an outfitter. Five percent of the economic impact is approximately \$131 million. The outfitter study found the economic impact to be slightly over \$110 million. With the outfitter data collection missing five months, it is clear that the stated impact by virtue of that study is understated. It appears, therefore, that the direct contribution to the economy by those who participate in an outfitted trip in Montana is at least \$110 million and could easily be as much as \$131 million.

The \$110 million economic impact level produced through the IMPLAN model reports that 1,956 jobs are directly involved in outfitting with a combined number of jobs of 2,590. One of the limitations to IMPLAN is the understatement of seasonal jobs; IMPLAN reports full- and part-time jobs only. According to the survey of outfitters nearly 6,100 jobs are created either through direct employment or contracted services. The total number of fulltime jobs was 1,500 with an additional 4,600 part-time jobs.

Another way to look at the economic impact of outfitting on the Montana economy is to identify those visitors who came to Montana *only* because of the outfitted trip. This study identified that 28 percent of all guided clients were in Montana because of the outfitted trip. Further analysis indicates the type of trip has a high correlation to their purpose of being in Montana. As shown earlier in this report, 82 percent of hunters came to Montana *because* of the guided trip while only 2 percent of rafters came to Montana *because* of the guided trip. The economic impact of those who came to Montana (and would not have been in the state if not for the outfitted trip) represents nearly half of the total impact.

Table 13 represents the economic impact of the outfitting industry from the 2006 outfitted client survey. As per the above discussion, it is the belief of these researchers that these impacts are slightly understated.

Table 13: 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
Industry output subsets of above				
Guided Hunting Trips	\$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
Economic Impact based on visitors ONLY in MT because of their guided trip (28% of all trips but 50% of total impact)				
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

Section V: Summary and Discussion

The outfitter industry is a viable sub-component of Montana's travel industry, provides jobs and proprietor income, and is the reason why 91,000 nonresidents visit Montana. For an additional 227,000 nonresidents, it added value to their Montana trip.

This study revealed that while hunting contributes the largest economic portion to outfitting in Montana, it has one of the smallest number of clients. Fishing has the second highest economic contribution to the state and the second largest number of clients. More clients take rafting/floating/canoeing/ kayaking trips than any other type of guided trip but spend the least amount of time and money in the state and are the least likely to have come to Montana specifically for the guided trip. Finally, three outcomes experienced were the same for all guided trip types – two of those experiences dealt with their connection to nature and the third centered around the excitement of their guided trip.

The outfitter industry in the west, and especially in Montana, provides an “attraction” to the state based on the natural resources. Since Montana depends on its natural resources to attract visitors, the outfitting industry is an opportunity for visitors to have experiences in nature they might otherwise have not experienced.

Outfitted trips tend to fit the realm of sustainable tourism and ecotourism in its true form. If the number of trips and number of clients are monitored so as to not overuse the resource, it is an industry that can be here forever. It is also a portion of the tourism industry that is almost all locally owned and operated. Most outfitters are small entrepreneurs with few, if any employees, and make a living from their outfitting business. Their purchases for supplies are generally made within the state and their salaries stay in the state. Finally, most outfitters have a love for the land and its resources. The desire is to keep working as an outfitter is strong, therefore they share their conservation ethics with their clients to assure a viable natural environment for the future.

The future of the tourism industry in Montana and the outfitting industry in Montana is dependent on the cooperation of residents, state and federal policy makers, and effective marketing for nonresident visitation. The results of this study provide ideas for discussion and recommendations for the future.

Discussion Points

The following points are provided as a means of further discussion about Montana's outfitting Industry.

- **High value, low impact:** This theme is stressed by Montana's strategic plan for tourism and recreation. Outfitting fits this theme extremely well. The highest economic impact trip type is hunting yet, the smallest number of people are involved in this type of trip. In addition, most nonresidents who participate in an outfitted trip spend more time in Montana than other vacationers, hence a higher economic impact to the state.
- **Tourism Industry support:** The outfitting industry provides a reason for nonresidents to visit Montana or a reason to experience something new. Outfitting is a value-added commodity to tourism in Montana and therefore the tourism industry should be a voice for outfitters.
- **Fish, Wildlife and Tourism:** Strong cooperation and communication between outfitters, FWP, and Travel Montana will create a sustainable outfitting industry in Montana. Tourism needs outfitters, outfitters need the natural resources, but fish and wildlife do not necessarily need outfitters or tourism. It is important that the fish and wildlife segments of FWP understand the outfitting and tourism issues and vice versa. This can only occur when there are strong allies in each of these segments.
- **Tourism and access:** Maintaining access to public lands is a must for the sustainability of the outfitting business which in turn sustains an important aspect of tourism and resident quality of life. The outfitting associations, tourism industry, and conservation groups should be working together on issues of county land planning. Western Montana, especially, is on the brink of becoming divided and conquered in terms of land use and accessibility.
- **Forest Service lands and outfitting opportunities:** Outfitters are dependent on the US Forest Service for much of their outfitting business. State tourism policy makers and tourism marketing entities need to work with the Forest Service and encourage them to look at all forms of outfitting as a priority in their management plans.

- **The nature experience:** Individuals on outfitted trips tended to rate highest their connection to nature as a part of their experience. Montana is blessed with abundant and beautiful natural resources that need to be cared for. Policy makers in Montana might adopt a similar statement and governing creed as the National Park Service “Preserve, protect, and share, the legacies of this land.”
- **Excitement and risk experience:** The excitement of the trip and the “risky but not really risky” experiences were also highly rated experiences by clients. The excitement and risk experiences are provided by the outfitters themselves and need to be in ample supply. Safety, while “going out on a limb,” appears to enhance the experience for clients and can be marketed as such.

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Appendix C: Outfitter Business Survey Comments

Our outfitting business was all on our private land with a yearly lease on hunting, which our client only came to on occasion. He no longer is our client and we are selling the property, since V.P. Cheney's accident liability is the huge concern.

Our trips are for teens and we do not run them to make profit.

This is for a non-profit snowmobile charity ride. All proceeds go to multiple sclerosis association of America and must be spent in MT.

All of my clients rent cars, buy gas, stay in lodges and hotels, eat out at restaurants and support many other parts of Montana's economy. I believe our industry is an important part of MT economy.

The amount of money my clients spent on licenses to the state of MT was approx. \$70000 in 2005.

We used to run more hunters and allowed them to use the lodge for vacations during the spring and summer. But due to harassment by fish and game, we discourage this and we hunt our hunters in other states.

The guy that owns the ranch brings his own employees to hunt. He buys all the licenses and transportation and lodging. ___ is the outfitter for the owner of ranch and he pays him a wage. This generates a lot of revenue for ___ County.

I've worked as a full time guide for 11 years and have just become an outfitter in 2006. I did not include tip money in estimate.

In this business, every year is different. Some years I will gross \$120,000, some \$56,000. It depends on a lot of factors, weather, fishing the year before, etc.

I teach the disabled to tie flies. All income dependent upon guided fishing within the state of MT. What little the state of MT has done to promote this renewable income sources is exceeded by many times by the red tape, excessive regulation and generally hostile attitude by employees of the state toward fishing industry.

A large part of my business is overnight camping/fishing trips, thus I have high food and equipment costs.

We farm/ranch, the outfitting helps pay the bills so that we can keep farm/ranch.

We do not write our personal business. Thank you.

When making conclusions from this study, I would like it noted how much outfitters pay to the state of MT. Not only do we use our own money to advertise and sell the over priced outfitting sponsored licenses, we also pay our regular state and fed taxes, bed tax, Board of Outfitter fee and state, BLM, forest service fees, amongst others.

Due to health problems, limited hunting has been done with much of it contracted out in 2004 and 2005.

2005 was the year that I took off and did no outdoor guiding but kept my license current.

Losing money in MT. Clients leaving because FWP is charging too much for Non-Res license.

Run a rental fly shop too. The expenses are intermixed. These are estimates except for contract labor.

This is no very good survey as I think some of this could be use against us instead of for us to tax, to income taxes what is generated is not on here. All my pay their own expenses motel, meals, etc.

Outfitting, particularly hunting, is vital to MT's economy.

It is no business of any body how much money I make.

Our guides are all independent contractors who are paid a set fee for trips. They are financially responsible for all expenses including but not limited to: vehicles, boats, equipment, gas, food, insurance, licenses, permits, and equipment/vehicle repairs.

Insurance, permits, and licenses costs take a greater part of outfitting profit.

FWP is the biggest thorn in the side of the outfitting industry, they want the money from the licenses sold, build instant to shut out outfitters in every aspect of the business. FWP will be the main reason I stop outfitting.

When you add the gross and deduct the expenditures, doesn't seem worth it does it? But I love the business!

We have a dude ranch. I am an outfitter in order to obtain forest service permits to hunt, fish, overnight and day use on the Gallatin.

\$48,758 paid FWP licenses fee's. Our Archery elk hunts bring in \$13,500 for each animal taken.

Our business if a small family run operation, that does river trips on the upper Miss. River national monument and a few trips on the C. M. Russell wildlife refuge. I pay my boys a little for trips and everything else goes back into the business.

As you can see we are in the business because we love it, not for the money. Thank you.

Refer quite a bit of business to local hotel, restaurants and other attractions. We also send multiple business leads to taxidermists, butchers, shippers, retailers, etc.

This firm would take way to much time to look up everything. These are estimates. I don't have time to respond to all.

We do not wish to disclose this information.

Expenses and taxes (2005) not filed, as I leave the country in fall; usually file in August.

15% of my gross will be gone for next year because of a recent decision made by the FWP to put mountain lion hunting on a permit for my region, this action will end the mountain lion hunting for my business.

This is a tough industry to survive in. Our insurance, licenses, permits, fees and other costs have sky rocketed from 20 years ago. This business has been in the family for over 50 years, yet the reintroduction of the wolves in Yellowstone has taken down the elk numbers in our area so drastically, we are anticipating quitting hunting.

University field studies program. Students pay tuition, can't separate out revenue.

To accurately depict revenue brought to the state, one must also look at the 43,000 in out of state licenses purchased from MT FWP and the approx. 500-1,000 spent in each community for pre-hunt and post hunt activities to include hotels, meals, rental cars, taxidermy, meat processing, etc.

Other repairs/maintenance and other interest are charged to ranch expenses plus vehicle licenses overlap with ranch expenses.

We are more day trips science education programs than guiding or outfitting.

Outfitting is part of our retail business.

I apologize for such a vague answer. The outfitting elements of our organization have only begun and are so intertwined with our areas (children's residential camp and retreat center) as to be inseparable from then at this point. This is the primary reason I cant offer you information regarding specific expenses.

Very poorly designed survey. This will not accurately reflect the economic importance of wildlife in MT.

I do not want to involve my clients in this.

We are not an outfitter. We do have horses but we are a church camp.

This survey does not take into account - money spent by clients in fly shops, hotels, restaurants, rental cars, retail shops, etc. - The outfitting business is a huge plus for MT economy.

90% of the money we spend to do business is done right here in Helena, MT. Our clients spend a lot of time right here in Helena and help the Helena business.

We use independent contactors.

Sole proprietor. No employees.

MT code 27-1-728 equine act liability limitations is very valuable. We are losing our open spaces to ride, view sheds, and peace and quite, all important resources for tourism in MT. Please advocate controlled, even restricted growth.

Expenses directly related to trips in MT is difficult to factor out. Our trips are part of our program, we do not budget on individual trips.

All our activities are educational or service in nature. We do not provide recreational outfitting services.

We actually provide guide services primarily along the Lewis and Clark trail because we enjoy it and if we make a few bucks that fine too. Otherwise, we're retired.

After all the taxes, fee's, licensing, payroll, etc. The average net income ranges from \$9,000 to \$12,000 each year.

US Air Force program monies generated cover expenses.

We are permitted to run river trips on Clark Fork River but only seldom operate trips.

We are guides mostly taking people on trips through Yellowstone and Grand Teton National Parks.

Guides are independent contractors, not employees.

This is a business owned by two parties. Each actively guide.

I clear about \$10,000.

The FWP Dept has driven two of my friends and me out of business with their very poor river rules which do not let us work, plus they put out adverse comments nation-wide. I quite going to YNP because a woman bureaucrat tried to tell me where we could stop and the five outhouses we could use. I hate bureaucrats and now it is pay back time.

Insurance and fuel will cause us to go out of business, if nothing is done about their costs. I see the other businesses shutting their doors. We just started, but we can read the writing on the wall. Especially is insurance. We are very small Ma & Pa operating and our insurance is more than 25% of our gross.

This information applies only to the backpack outings I personally lead for the Sierra Club, not to other activities in MT which may be led by other volunteer Sierra Club outings leaders in MT. Expenses are largely borne by the National Office.

This year is very uncommon. I was seriously injured and my season was cut short. I lost approx. 90% of our business.

I have worked a long time to build my outfitting business. We contribute a lot to MT economy. Thanks for asking!

For expenses, it is very difficult to calculate. We run a guest ranch also, and the overall expenses are combined. It would be sufficient to estimate the overall expense load on the outfit, including debt service @ approx. 85%.

I have no way to determine the split between outfitting and ranch expenses. You can assume that every dollar the outfitting business makes goes back to the local economy. The exceptions would be \$890.00 paid to an insurance company and all use fee's paid to BLM and USDA (approx. 875.00)

Outfitters & guides are in the oldest profession in America. The first Europeans to America were shown where to hunt & fish by the Indians. Today much is different but outfitters must be a part of managing wildlife. We provide so much to MT. Many towns would cease to exist if not for outfitters. I hope your study reflects the value to our state

This is another form of income for our 100 year old ranch. We started fee hunting in 1970 but only on our own land. It is a necessity to survive in today's agriculture. It is our only product that we can control the price.

I just got my outfitters license last year. Most of my 90+ days were for other outfitters.

It is high time the Board of Outfitters starts helping outfitters/guides instead of harassing them!!!

It seems to me that my business is abnormally highly regulated. I have an outfitters license, captains' license and there is talk of having to obtain a independent contractors license. Too many hoops to jump through to be in business.

As an outfitter in MT (fishing) you make a lot of money and it takes a lot to run the business/pay guides/lunch/shuttle/insurance/ and pay the monthly expenses for the fly shop. I do the outfitting because I LIKE IT!!!

I just received my outfitters license in 2005. I haven't really got started yet.

Primary business is dude ranching which includes various activities. Some of the specific activity days and revenue are estimates.

High overhead one must either raise rates excessively, increase client numbers substantially or diversify.

Clients spending lots of dollars loosely. Food, lodging, gifts, summer homes, real estate, furnishings, maintenance and fishing supplies. I don't think main street Hamilton would survive without them.

After filling this out, I see I need to keep better records!!! Thanks.

The biggest burden is from the government, very splintered help from state land regional travel ass. No uniform or concrete plan to help outfitter ad or market. Most of the emphasis is on our 2 national parks. But fly fishing, snowmobiling, are huge draws and river rafting is a great sub.

I have been more active in the past. I have placed my outfitters license on inactive status for 2006. I have other endeavors that are occupying my time.

Book keeper out of town.

Sorry I couldn't give you more but my records are already stored away.

Workers comp. insurance paid at a rate of 24% is a major problem for US.

With the price of everything going up stores and other agencies make more than the people doing the work.

Our horseback trips are part of our total guest ranch expenditure which has a 2.5 million dollar income with equal expenses.

The greatest threat to our business has been the implement of use regulations and escalation of river use fees.

I'm very familiar with surveys and recreation research and this took a long time (2 hours). Too much- I would not do it again without incentive. I know you need detailed info, but I'd encourage you to rethink how your going about this. I've got way too many other pressing matters to run my business. I'm sure others feel the same.

All payments to guides listed in section 13 are to independent contractors.

2005 was by far a slow year for our business.

The guiding aspect of our business is new, we have operated a bicycle & Nordic ski rental store for 10 years. We were unable to guide until 2 years ago due to restrictions on forest use. Getting permits was difficult and time consuming. We anticipate huge growth in this area of our business. In 2004/05 we had 30 use days with an increase.

Sorry I don't have time to look up and calculate the details of your questions.

I feel this is confidential only as long as you want it that way. There are too many questions that are none of your business.

Ours is a 3rd generation family business.

Legal expenses most years have been around \$1000 or less. 2005 was very unusual.

We are an education program, not a guide or outfitter. This financial info is not relevant to our operations in MT as trips are included in our tuition.

Total expenses = \$208000 Profit = \$17000

Appendix D: Client Survey Comments

Very though and competent outfitter, excellent facilities and food. Excellent horses and pack mules.

Will come back again!

Came to Montana to experience the landscape, undisturbed nature.

Sweet,....Word!

Stupid repetitive questions.

it was awesome! I loved the trip.

I had lots of fun!

This area is in expendable. We need this area and the others like it. I see myself bringing my own family here in the future. Thanks for listening.

Great trip!

I love Montana!! (where are the bears!)

Wilderness experience breeds respect, restraint and humility

Had a great experience with my son.

Expenses paid for by other family member.

Had a good time!

Missoula is getting too crowded.

Was limited by abilities of travel group.

_____ was outstanding (guide) and our group was a great mix.

_____ is a first rate organization, our guide was fantastic. MT. Is beautiful and I hope it stays unspoiled.

Lost my tooth, Told dirty jokes, Cut my hand, Learned Montana slang.

Food was awesome!!!

Had a loud talkitive husband with me. Had a very great trip & great guide.

Guide & sherpa were top quality- food was excellent- wonderful experience!

Gorgeous country!

We had the best guide possible-PERFECT. Will send many referrals

I had an absolutely amazing time on this trip - I would recommend it to anyone.

It was awesome. I got after it!!

Have done this and other trips many times before in this same area.

Solid, Bedrock, salt-of-the -earth people. Outfitter, guides & staff were wonderful

Our outfitter was committed to our safety, comfort, our desires & enjoyment. We would highly recommend this outfitter to both first timers & seasoned veterans.

Best experience of my life.

Beautiful place

It was a true wilderness experience. (They) truly let you experience this with its adequately furnished camp. You don't come to the MT. Wilderness to experience wine & candle light at the Waldorf Astoria.

It takes 2 years to save enough to do a hunting trip while vacationing in MT. We have tried to do this every 2 years since 1996.

_____ Outfitters were excellent ambassadors for MT. And I will definitely return here again.

A wonderful experience to be in MT. & be surrounded by the wonderful outdoors. The hunt was excellent & I will be back.

Great outfitter, great service, great cooking A+

Enjoyed myself!

My daughters were treated with the most respect and love by our outfitter. It was a great time for all of us.

Hotel needs to be more professional !!

Great trip - best raft trip ever.

Had a blast.

Great trip. Montana is beautiful. Only disappointment is that development in Big Sky & traffic.

Montana is beautiful. We'll be back!

Hell Yeah !!!!!

Great time - will come back to MT. - maybe in the winter to ski. Beautiful.

This has been a fantastic experience! I look forward to much more time in Montana.

Great State (So far) !

Wonderful float trip Beautiful scenery peaceful awesome place to come back to.

Super - enjoyable trip all round !!!

John - a great guide.

I enjoyed myself, would recommend this trip to others.

28" Rainbow

Fabulous !!! We love it !

Had a fantastic trip!

More catch & release fisheries

It was a five star day *****

Montana is definitely THE LAST BEST PLACE in this country!!!

Good trip, My 5th trip with this guide.

Very nice float trip.

This was a benign river float - not a test of skills, completely & thoroughly enjoyable & a particularly skillful & pleasant river float thru your beautiful state, We'll be back!

Open streams full day - Love it here!

We have to treasure and preserve these beautiful but limited natural resources

Had a great time & experience with great Montana people.

...was great very good time. Family was great to meet and went out of there way to make sure we had a great time.

Awesome hunt - Outfitter treated us great and worked hard for us.

Like to met new people & life styles & possibly make some friends.

Have been here 4 times and am very serious about relocating to this state, I love it!

Great time, Great experience... My 6th trip out here and will come back.

Using an outfitter is the only way to go.

Please allow those of us who are not resident to continue to enjoy your wonderful state.

Great trip ! Hope to be back next year.

Had a great time , hope to return next year.

A great experience with capable, experienced guides on a pristine ranch- - Bozeman

Had a great time. Without outfitter's it could not be as good or safe. Great people.

Obviously, some psychiatrist came up with these questions. I would suggest you get someone whose head is not in the clouds to design new questions! My guides were superb!Ranch is Montana's best protected treasure!