

# Gateways to Yellowstone

Protecting the Wild Heart of Our Region's Thriving Economy



National Parks Conservation Association®  
Protecting Our National Parks for Future Generations®

May 2006

## About This Report

*Gateways to Yellowstone* synthesizes four studies on the economy of Yellowstone National Park's gateway region. These six counties in Wyoming and Montana share a close relationship with the park and the complex of wildlands at the core of the Greater Yellowstone region.

Most of the data and other information supporting this document's findings come from these four foundational studies. The reports that detail these studies are available on the Internet at [www.npca.org/northernrockies/gateway](http://www.npca.org/northernrockies/gateway). Or you may order copies from the Northern Rockies office of NPCA, P.O. Box 824, Helena, Montana 59624. Telephone: (406) 495-1560. E-mail: [northernrockies@npca.org](mailto:northernrockies@npca.org).

The four studies are:

### ■ *The Economy of the Greater Yellowstone Region: Long-Term Trends and Comparisons to Other Regions of the West*

RAY RASKER, Senior Economist, Sonoran Institute, Bozeman, Montana (2006)

Rasker analyzed economic data to examine economic success in the Yellowstone region and compare economic performance with other regions and similar national park gateway and non-gateway counties throughout the West.

### ■ *Yellowstone Wildlife and the Regional Economy: Review of Economic Study Results and Analysis*

CHRIS NEHER, Senior Economist, Bioeconomics, Missoula, Montana  
JOHN DUFFIELD, Ph.D., Adjunct Research Professor, Department of Mathematical Sciences, The University of Montana, Missoula (2005)

Neher and Duffield reviewed recent studies regarding visitor and resident attitudes, opinions, and behavior related to wildlife and wildlife-related issues in the Yellowstone National Park area. (Used with the gracious permission of the Yellowstone Park Foundation.)

### ■ *Wildlife's Contribution to the Greater Yellowstone Regional Economy*

SUZANNE MILLER, Biometrician, Dunrovin Research, Lolo, Montana (2006)

Miller analyzed the economic contributions of big game hunters and wildlife watchers in the Yellowstone region. She also devised and conducted an original Internet study examining the business use of wildlife-related terms for marketing and branding.

### ■ *Economic Development in Environmental Economies of the Northern Greater Yellowstone Region.*

JEFF GRAFF, MPA, Montana State University, Bozeman, Montana (2006)

Graff interviewed 95 business owners and managers exploring their perspectives on doing business in the Yellowstone region, the region's future, and important factors in their decisions to move to, or establish businesses in, the area.

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Snow-covered Electric Peak: J. Schmidt, Courtesy Yellowstone National Park

Small photos, left to right from back cover: Russell Pickering/Park County Travel Council;

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At the Buffalo Bill Historical Center, Cody Wyoming

*Connecting People and Nature in  
Yellowstone and the Rocky Mountain West*



As a wildlife scientist and founding curator of the Draper Museum of Natural History, I have explored the unparalleled natural resources of the Yellowstone region and their importance to the people who live and visit here. This is a region of vast natural beauty and wildlife treasures — elements that are declining through much of our world. With Yellowstone National Park at its core, our region is highly revered around the globe for the spectacular natural assets that we too often take for granted.

Natural amenities are driving the dramatic “New West” population and economic growth documented in *Gateways to Yellowstone*. These forces of change are certainly welcome to our pocketbooks, but represent potential threats to the very natural amenities and “Old West” cultural heritage that draw people to live, work, and recreate here in the first place. We are thus presented with the formidable challenge of maintaining our western character and lifestyle and conserving our wildlife and other natural treasures while forging a robust, diverse and sustainable economy.

We must meet this challenge by focusing on a common vision that recognizes economic, cultural, and environmental health as intimately intertwined. That focus will allow us to bring together the best of the Old West and New West to create the Next West here in the Greater Yellowstone region.

*Gateways to Yellowstone* provides a common base of information for shaping the future. The report makes it clear that Yellowstone National Park, its surrounding wildlands, and the wildlife supported there are critical driving forces in our region’s economic success. Communities in this region benefit the most from its natural assets, and should shoulder the greatest responsibility for their stewardship.

*Gateways to Yellowstone* inspires a sense of urgency. As leaders of these communities, we must proceed boldly to shape a future where our great, great grandchildren can enjoy the natural assets and opportunities we enjoy today. I look forward to working with you to create this legacy.

**Charles R. Preston, Ph.D.**

*Chief Curator, Buffalo Bill Historical Center*

*Founding Curator, Draper Museum of Natural History*

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*Buffalo Bill Museum • Cody Firearms Museum • Draper Museum of Natural History • Plains Indian Museum  
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## Executive Summary

*The six counties of Yellowstone's gateway region share proximity and a close relationship with Yellowstone National Park. They also share an economic success that rivals that of other fast-growing regions in the country.*

In his 1895 volume, *The Yellowstone National Park*, historian Hiram Martin Chittenden called the park's creation "a natural, an unavoidable proposition":

To those who first saw these wonders, and were not so absorbed with gold-seeking as to be incapable of appreciating their importance, it was clear that, within a few years, they must become objects of universal interest. It was equally clear that the land around them would soon be taken up by private parties, and that the beautiful formations would be carried off for mercenary purposes....

And so, in 1872, Yellowstone became the world's first national park, sparking a global movement. Today, the park and its surrounding wildlands are the heart of one of the world's last intact temperate ecosystems. The Greater Yellowstone area is full of natural treasures. Still today, Chittenden's cautionary tale rings true: The discovery of Yellowstone continues and it seems that everyone wants a piece of this region.

### Understanding Local Economies, Landscapes, and the Park

In 2005, through its offices in Helena and Livingston, Montana, the National Parks Conservation Association (NPCA) commissioned four studies to explore the roots of the Yellowstone region's tremendous economic success. These studies

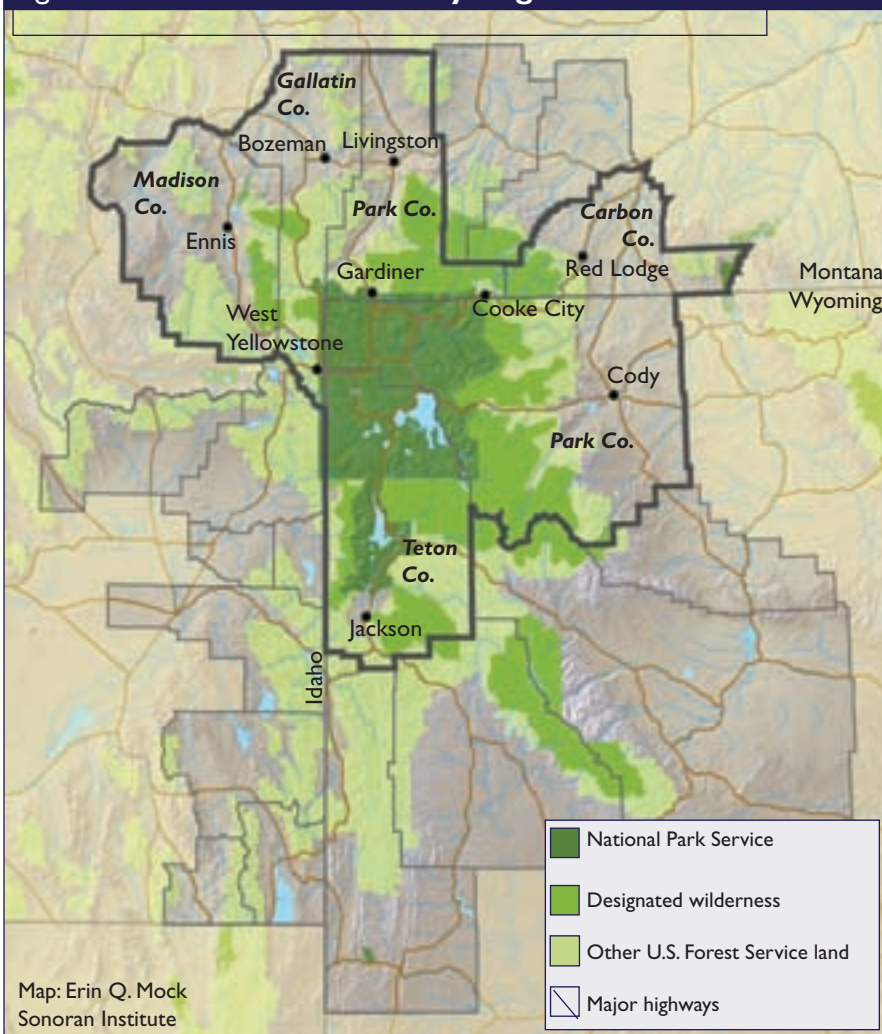
focus on Yellowstone's gateway region, which encompasses six counties that share proximity and a close relationship with the park: Carbon, Gallatin, Madison, and Park counties in Montana, and Wyoming's Park and Teton counties.

Together, these four analyses tell the story of a region in which a booming economy is intertwined with an essential wildness. *Gateways to Yellowstone* documents the economic importance of the region's natural wonders and wildlife, which do far more than simply draw tourists in large numbers. Much of the area's success is driven by its attractiveness to newcomers and long-time residents: the spectacular natural setting, abundant and varied wildlife, easy access to outdoor recreation, and small, friendly towns.

The gateway region is part of the Greater Yellowstone region, an area of 20 counties in Idaho, Montana, and Wyoming that encompasses the Greater Yellowstone ecosystem. The gateway region comprises the following six counties:

Montana	Wyoming
• Carbon	• Park
• Gallatin	• Teton
• Madison	
• Park	

Figure 1 Yellowstone's Gateway Region



This report also shows how the region's popularity threatens the very qualities that underpin its attractiveness. It points toward a range of actions that can help those who have chosen this place as home maintain a balance between a healthy landscape and a healthy economy. *Gateways to Yellowstone* presents six key findings, explored in more detail in the main body of the report:

### ■ **Finding 1: Yellowstone's gateway region is thriving.**

The economic analysis underpinning this report reveals that Yellowstone's gateway region economy is outpacing other high-performance regions across the West.

- Per-capita income and population both grew 33 percent between 1990 and 2003. (Per-capita income grew only 12 percent in the 1980s.)
- The number of firms doing business in the region shot up 42 percent between 1993 and 2003. The fastest growth was among companies with no more than four employees, indicating a surge in entrepreneurial activity.
- Unemployment is consistently below the national average. In 2004, the average unemployment rate in the region was 3.6 percent—while the national average was more than five percent.
- The gap between rich and poor appears to be narrowing. For each household that made more than \$100,000 in 1989, 27 made less than \$30,000. In 1999, only five households made less than \$30,000 for each one that made more than \$100,000.

The region boasts activity in a broad range of industries. Every county in the gateway region enjoys greater economic diversity than most other U.S. counties.

### ■ **Finding 2: The region's unparalleled natural environment is its chief economic asset.**

The region's wildlands and wildlife are indispensable to the area's appeal to residents. Scenic beauty, easy access to outdoor recreational opportunities, the large core of public lands, and family-friendly towns are key reasons people want to live here. The importance of wildlife is underscored by high participation in activities such as hunting and wildlife viewing.

Visitors are drawn to the region by much the same features, chiefly Yellowstone National Park, mountains, open space, rivers, and wildlife. Visitors' economic impact extends well beyond the money they spend while traveling, as travelers often turn into residents. Some 40 percent of business owners surveyed in three gateway counties decided to move to the region after first traveling here.

### ■ **Finding 3: Communities throughout the West benefit from proximity to national parks and other protected public lands.**

Across the West, counties near complexes of national parks and wilderness areas outclass their "nonpark" peers in most economic measures. The strong appeal of their wildlands and wildlife to residents and newcomers is at the heart of this supercharged economic performance. Even in comparison to these peer areas, Yellowstone's gateway region is a top performer.

*Long-time residents, newcomers, and visitors find the same qualities appealing about Yellowstone's gateway region: Spectacular scenery, abundant wildlife, easy access to outdoor recreation, and small, friendly towns.*



Downtown Livingston, Montana, against a backdrop of mountains.  
(DONNIE SEXTON/TRAVEL MONTANA)



*Maintaining the region's wild core is essential to the future of the gateway region's thriving economy.*



**Top:** Trail in Montana's Beartooth range. (DOUGLASS DYE/DUSTY STAR PHOTOGRAPHY)

**Bottom:** Fisherman, Yellowstone National Park. (PHOTOS.COM)

#### **Finding 4: Yellowstone National Park is the region's ecological core and an anchor for its thriving economy.**

As the region's ecological core, the park and its surrounding wildlands are key habitat for the wildlife that lends the area much of its unique appeal.

Business owners across the region use Yellowstone's worldwide name recognition in their marketing. Many of those interviewed for this report believe the region's environment—including the park—provides big benefits to area businesses and is integral to the quality of life that is a magnet for visitors, newcomers, and long-time residents.

#### **Finding 5: Yellowstone's wildlife generate significant economic value for the area.**

The appeal of Yellowstone's gateway region is directly connected to the wildlife that inhabit its spectacular landscapes. Hunting, fishing, and wildlife viewing make considerable contributions to the region's economy. Businesses take advantage of this, using wildlife-related words and images to attract potential customers.

#### **Finding 6: The Yellowstone gateway region's most important economic assets are threatened.**

Residents and visitors are already seeing changes to the qualities that drew them to this region, ranging from loss of open space to increasing recreation pressure. Some business owners are concerned that the area's popularity will eventually erode quality of life and visitors' experiences.

Pressures from growth and development threaten essential habitat for the region's diverse wildlife. Chronic underfunding and other challenges leave Yellowstone National Park staff unable to adequately protect resources, maintain infrastructure, and serve visitors. Threats from inside and outside the park put wildlife and other resources at risk. More cooperation is needed to avoid the negative effects of decisions that spill over from one part of the region to another.

### **Gateways to Yellowstone: How We Can Shape the Future**

*Gateways to Yellowstone* concludes that maintaining the region's wild core is essential to the future of the gateway region's thriving economy. Gateway communities and their leaders will play a crucial role in defining the future of this region, whether through a silent acquiescence to whatever comes or through bold leadership and action. Four recommendations offer a framework—a starting place—for investing in the region's future:

1. Maintain the integrity of Yellowstone National Park, the region's core;
2. Protect important habitat for the region's wildlife;
3. Think and collaborate regionally; and
4. Assume leadership that focuses on the importance of the region's common assets and shared values.

Community, business, and government leadership will be indispensable in building the broad commitment and new collaboration from which this investment—of time, vision, and money—will come.



In 1993, *Fortune* magazine featured Bozeman transplant Nick Davis in a cover story entitled “How We Will Work in the Year 2000.” Davis moved to Bozeman and ran a small investment management firm from his home office using technology and online services that weren’t available during his earlier days as a big-city Paine Webber broker.

Predicting the disintegration of ties that bind workers to a specific location, the author wrote: “The computational infrastructure will benefit us by allowing more people to live and work where they want to, probably far from cities, hooked up electronically to their market, their database, or the rest of their organization. The trend will be spearheaded by independent professionals, technicians, and small organizations.”<sup>1</sup>

As it turns out, *Fortune* was right. The old truism that “people follow jobs” has been turned on its head as “jobs and businesses follow people” to attractive areas like the Greater Yellowstone region. Across the West, areas once considered too remote to foster diverse, thriving economies have prospered as more people are able to choose where they live.<sup>2</sup>

With growing momentum over the past three decades, Greater Yellowstone has attracted people, prosperity, and diverse businesses. Its economy is, in a word, booming. Much of this economic success is driven by the lure of the beautiful natural setting, abundant and varied wildlife, easy access to outdoor recreation, and friendly towns. These characteristics draw newcomers and new economic activity, and hold the loyalty of long-time residents who live, work, and do business in this spectacular place.

## The Region’s Wild Core

At the core of this region full of natural treasures is Yellowstone National Park—the world’s first national park, and an icon of protected areas around the globe. Yellowstone is the heart of a nearly intact ecosystem that supports virtually all of the species found here before the arrival of European settlers, including a full complement of predators, the largest elk herds in the world, and the last remaining wild bison herd, a continuous feature on Yellowstone’s landscape since settlement times.

*With growing momentum over the past three decades, Greater Yellowstone has attracted people, prosperity, and diverse businesses. Its economy is, in a word, booming.*



Yellowstone National Park is known around the world, a symbol of commitment to protecting unique and spectacular landscapes and wildlife.

**Left:** West Yellowstone, Montana (DONNIE SEXTON/TRAVEL MONTANA)  
**Right:** Bison at Firehole River, Yellowstone National Park (MICHELE ARCHIE)





One of the country's wildest places, the Yellowstone region also boasts one of the nation's healthiest economies.

Main Street, Cody, Wyoming.  
(RUSSELL PICKERING/PARK COUNTY TRAVEL COUNCIL)

*In no small measure because of its core of wildlands, the Greater Yellowstone region has one of the country's healthiest economies, keeping up with, and even outperforming, other well-recognized and successful regions around the country.*

This ecosystem, and myriad plant and animal species, would not survive intact without millions of acres of essential habitat protected. Headwaters for three major river systems are here, feeding a large landscape with clean waters and spawning world-class fisheries. The region's public lands attract visitors —nearly 3 million each year to Yellowstone National Park alone.

But the role of the park and surrounding public lands as tourist destinations tells only part of the story of their economic importance. The 20-county Greater Yellowstone region is one of the country's wildest places. In no small measure because of its core of wildlands, it also has one of the country's healthiest economies, keeping up with, and even outperforming, other well-recognized and successful regions around the country (see Figure 2).

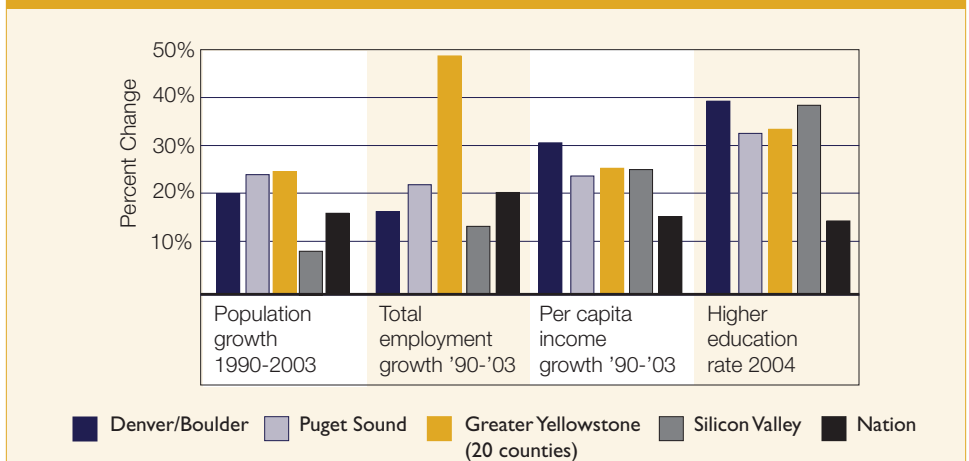
### Four Foundational Studies

Four studies provide the foundation for this report. These studies explore the influence of Yellowstone National Park and other public lands on economic vitality in the region. They draw on original research and analysis as well as reviews of pertinent literature and other information sources to illuminate how economic success is tied directly to protected areas and wildlife.

Consistent with NPCA's focus on national parks, these studies focus on six counties—Madison, Gallatin, Park, and Carbon in Montana, and Teton and Park in Wyoming—that share proximity to the park and encompass the region's primary park gateways and access routes.

The studies underpinning *Gateways to Yellowstone* indicate that this gateway region supports a remarkably diverse and healthy economy substantially connected with the health of its wild core.

Figure 2 Greater Yellowstone Region is a Top Performer



Notes: Total employment refers to all jobs, both full- and part-time. Higher education rate is the proportion of adults over 25 with a college degree.

Source: U.S. Bureau of Economic Analysis

## Yellowstone's gateway region is thriving.

Even within the context of the highly performing Greater Yellowstone region, the six-county gateway region stands out. In 2003, per-capita income was 19 percent higher than in the larger region. The college education rate among the adult population was seven percent higher. The ratio of rich to poor was 13 percent lower.<sup>3</sup> (See Figure 3 for more comparisons.)

### The New Economy, New Income, and Newcomers Fuel Growth

The gateway region's economic health rides, in part, on a wave of new migrants. Between 1990 and 2004, newcomers accounted for 68 percent of area population growth. At the same time, fewer residents moved out of the region than in the past. The growing population results in more demand for goods and services, and more new and expanding businesses.

Population growth is not the whole story of the region's economic vitality. The maturing of baby boomers makes the 35-54 age bracket the biggest age category, followed by the 15-24 age bracket (their children). The largest group of adults is now in the highest-earning part of their careers, adding to the flow of money in this economy.

"Transportable" sources of income such as retirement payments and returns on investment portfolios and properties have grown in importance for long-time residents and newcomers alike. In 2003, non-labor sources made up 39 percent of all income in the region (about the national average), up from 29 percent in 1970. Forty-three percent of new income between 1970 and 2003 came from non-labor sources, helping stabilize the economy by blunting the effects of cyclic declines in labor income.



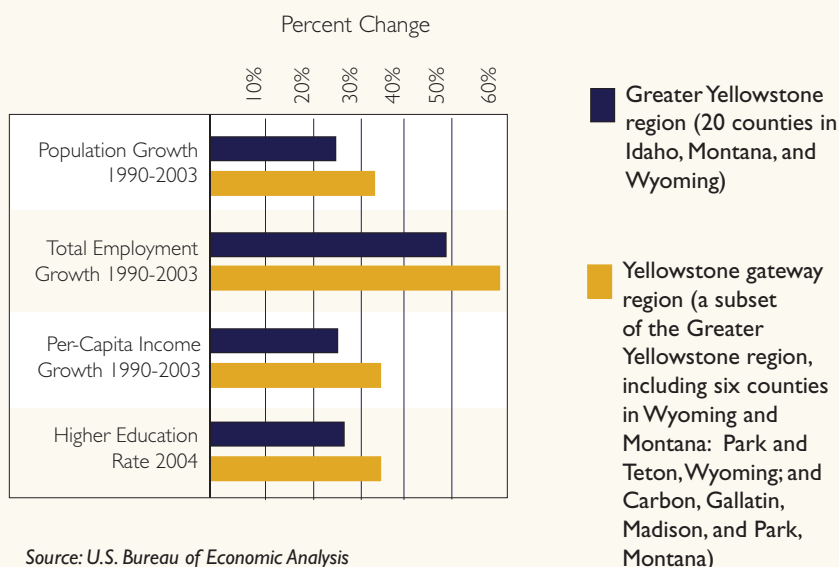
**Gene Bryan, Cody**  
Executive Director,  
Cody Country Chamber  
of Commerce

"Cody is a fantastic place to live. That's as important to people who have lived here their whole lives as it is to people who are moving to the area.

"Frankly, job opportunities are less a focus for newcomers than the region's outstanding natural features, easy access to recreation, great schools and our friendly towns.

"Cody Country is a good place to do business. People who can locate their businesses anywhere in the country decide to locate here. We see a lot of investment of money and creativity tied back to the simple fact that people want to live here. That's certainly helped make our economy diverse and healthy."

**Figure 3 Gateways Outperform Greater Yellowstone Region**



*Ranked among 138 similar-sized, non-metropolitan counties in the eight states of the Rocky Mountain West, Montana's Gallatin County topped the list for the number of small businesses generated between 1980 and 2001.*

The “services and professional” sector and construction have been the main sources of new labor income in the region. Growth has been particularly strong in subsectors that tend to offer high-quality jobs, such as engineering, business, and health services (see Figure 3).

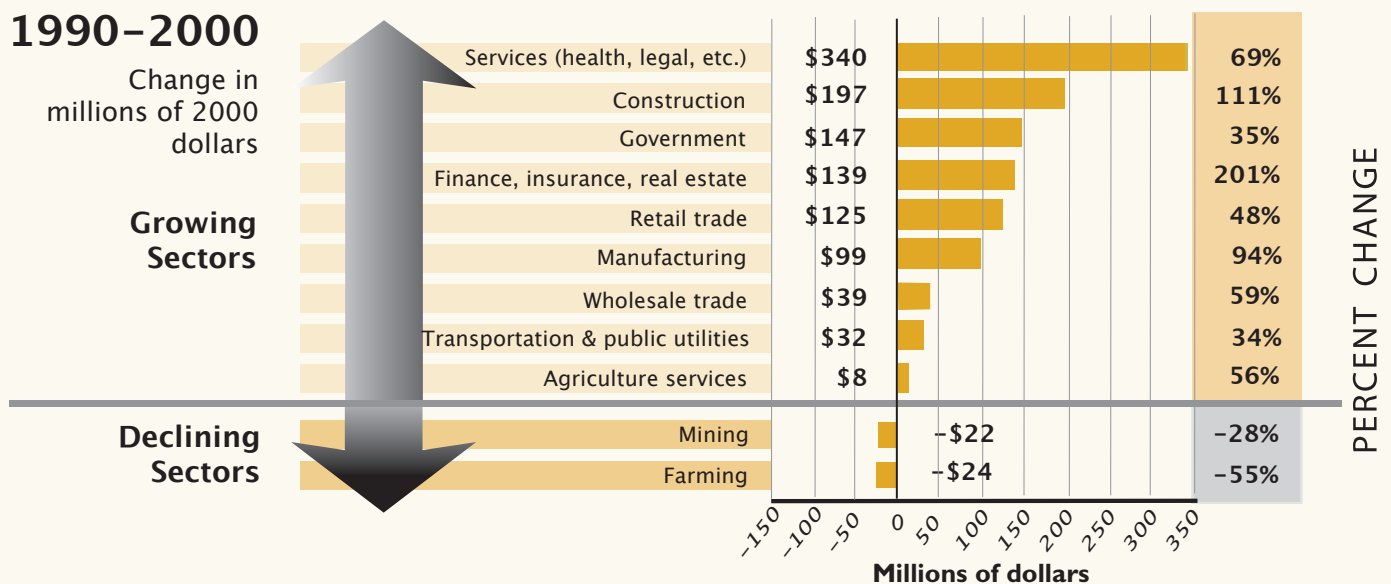
### A Healthy and Diverse Economy

The national shift to a services-oriented economy and improvements in information technologies have made it easier for people to live and work in places like the Yellowstone region, once too remote to attract activity in a diversity of industries. Now, this region boasts software, pharmaceutical, and biotechnology companies, international engineering and construction firms, architecture firms, scientific research institutions, and financial management companies.

In 2003, 8,282 companies were doing business in the gateway region, a 42 percent increase in one decade. Most businesses have fewer than 20 employees, and the fastest growth was among those with four or fewer employees. Ranked among 138 similar-sized, non-metropolitan counties in the eight states of the Rocky Mountain West, Gallatin County topped the list for the number of small businesses generated between 1980 and 2001.<sup>4</sup>

Yellowstone’s gateway region enjoys tremendous economic diversity, which lends stability to the economy. Some communities are more specialized than others. Employment in the region as a whole, however, is spread across a broader array of

Figure 4 Growing and Declining Sectors in the Gateway Region Economy



The “services” sector added the most new labor income to the region’s economy between 1990 and 2000. This is a broad sector within the even wider-ranging “services and professional” category. It encompasses health, business, legal, and a variety of other service types. Among these, the fastest-growing are:

1. Health services
2. Hotels and other lodging places
3. Business services
4. Engineering and management services

Note: Change in these sectors is measured in labor earnings, in inflation-adjusted 2000 dollars.

Source: U.S. Department of Commerce

industries than in most other parts of the country. Based on 2000 Census data, the median “employment specialization” score for all U.S. counties is 961. The gateway region is much more diverse, with a significantly lower (and better) score of 781, placing it with the top five percent of U.S. counties for economic diversity.

Most business leaders interviewed for this report agree that the area’s growing population has been good for their bottom line and for the region’s economy. A common view is that new residents create a demand for services. The result is greater variety for everyone—including locals, tourists, businesses that need services from other companies, and potential employees.

### Signs of Improving Well-Being

Several indicators suggest that tremendous economic growth in Yellowstone’s gateway region is improving well-being for area residents:

- Income and employment have grown faster than population. From 1990 to 2003, population grew 33 percent. Personal income (adjusted for inflation) shot up 81 percent, and the number of jobs grew by 60 percent.
- During the same time, unemployment rates in the area dropped by one-fifth. At 3.6 percent, the gateway region’s 2003 unemployment rate was lower than in the United States (5.5 percent) and in Idaho, Montana, and Wyoming combined (4.2 percent).
- For every household that made \$100,000 in 1989, 27 made less than \$30,000. Ten years later, only five households made less than \$30,000 for each one that made more than \$100,000, suggesting a narrowing gap between rich and poor.<sup>5</sup>
- Per capita income has grown rapidly in the past decade, driven in large part by growth of non-labor income. In 2003, per capita income was \$32,683—higher than the national average of \$31,472.

Low average wages per job are a dull spot on a bright economic picture. At \$28,820 in 2003, they were lower than the Montana/Wyoming average (\$31,051) and the nation (\$42,553). This may be due, in part, to more part-time jobs and more lower-paying hospitality jobs than elsewhere.

Since 1990, earnings per job have grown steadily. And, since 2000, the percentage of total personal income from non-labor sources has declined, suggesting the creation of more jobs that pay better. Despite legitimate concerns about rising housing costs in the region, a family making the median income can still afford to purchase the median-priced home. This is one sign that wages go further here than in many other parts of the country.

*The Yellowstone region was once considered too remote to attract activity in a diversity of industries. It now ranks with the top five percent of U.S. counties for economic diversity. It boasts software, pharmaceutical, and biotechnology companies, international engineering and construction firms, architecture firms, scientific research institutions, and financial management companies.*



The Buffalo Bill Historical Center (Cody, Wyoming) and Printing For Less (Livingston, Montana) are among the largest employers in their counties. These two world-class businesses add to the region’s tremendous economic diversity.

**Left:** Buffalo Bill Historical Center (PARK COUNTY TRAVEL COUNCIL). **Right:** New Printing For Less building under construction (TIM STEVENS)

## Finding 2

*When asked why they live in the area, most business owners and managers interviewed for this report pointed to the region's natural beauty, public lands, and outdoor recreational opportunities.*

### The region's unparalleled natural environment is its chief economic asset.

The “Employment Opportunities” page on the website of Livingston-based PrintingForLess.com greets job-seekers with the question: “Looking for a high-tech opportunity?” Next to an aerial image of densely packed homes and commercial buildings is a peaceful scene of a snow-covered mountain on a sunny day. The caption reads, “You could live here, in Silicon Valley...or here, in Paradise Valley.”

That kind of appeal is at the heart of the Yellowstone gateway region's economic success.

#### The Region's Natural Magnetism

When asked why they live in the area, most business owners and managers interviewed for this report pointed to the region's natural beauty, public lands, and outdoor recreational opportunities. While other values were mentioned—including small towns, proximity to family, jobs, and a sense of community—no other set of reasons was mentioned by so many.

Economists describe this as a region rich in “natural amenities,” characteristics that are perceived to add value or quality of life. A substantial body of research indicates that natural amenities are important attractions to people who move to rural areas in the West. Based on this literature, an article published in *Human Ecology Review* concluded that “protection of the wild and scenic character of the landscape and the quality of life in local communities serves as a magnet to attract and retain local people and their businesses. These qualities are a vital part of the economic well-being of local residents, and help to insulate communities from the out-migration that is all too common for the rest of rural America.”<sup>6</sup>

A survey of business owners in Montana's Madison, Gallatin, and Park counties suggests that newcomers and long-time residents alike place high value on these qualities in deciding to locate and keep their businesses in the area. Those who had



Surrounded by stunning mountain terrain and recreational opportunities, Jackson, Wyoming, illustrates the appeal shared by communities across Yellowstone's gateway region.

**Left:** Jackson, Wyoming (LATHAM JENKINS/CIRCUMERROSTOCK.COM)

**Right:** Mountain bikers near Cody, Wyoming (RUSSELL PICKERING/PARK COUNTY TRAVEL COUNCIL)



lived in the region longer than five years rated quality-of-life values (such as scenic beauty, public lands proximity, and recreational opportunities) even more highly than did newcomers.<sup>7</sup> (See Figure 5 for more findings from this study.)

## Visitor Appeal

In 2003, 30 percent of all summer visitors to Montana spent at least one night in the “Yellowstone Country” tourism region. The top attractions? Yellowstone National Park, mountains, open space, rivers, and wildlife.<sup>8</sup> The list of top visitor draws overlaps significantly with the characteristics that residents find important.

This should come as no surprise, since so many of the region’s residents started out as visitors. A survey of business owners in three Montana gateway counties discovered that 40 percent of them first came to Montana on vacation or business travel, and then decided to move to the area.<sup>9</sup>

Eric Lindeen, marketing director for software manufacturer Zoot Enterprises, says the Yellowstone region is important to the success of his product: “We make software for large financial institutions, almost all of which are out-of-state. Our customers associate the region with our company, and they *love* coming to visit.”

## The Land and Its Wildlife

In this place of astounding beauty and easy access to wildlands, residents and visitors place high value on the wildlife that share the landscape. Two-thirds of Yellowstone-area residents take part in wildlife viewing, 66 percent more than the national average.<sup>10</sup>

Residents are not alone in keeping an eye on wildlife. Among visitors to Montana’s Yellowstone Country tourism region, wildlife watching is the single most popular activity. Two of every five visitors participate.<sup>11</sup> While bears, wolves, moose, and mountain lions top the list of “most wanted” wildlife sightings among Yellowstone park visitors, areas such as Fishing Bridge and LeHardy Rapids attract large numbers of visitors interested in seeing Yellowstone cutthroat trout and other river-dwelling wildlife in their native habitat.<sup>12</sup>



**Dana Taylor, Livingston**  
Board Member, Alliance  
Development Corporation

“The first time I went to Yellowstone, the wildlife and geothermal areas gave me goosebumps. My feelings about the park haven’t changed a bit.

“Livingston’s proximity to wilderness areas is important to me, and so is how easy it is to get out hiking, skiing, and floating.

“Yellowstone National Park is a special place that needs to be preserved and protected. On public lands outside the park, land managers carry out a difficult balancing act among competing demands. I think it is important that they keep in mind the natural beauty and wondrous nature of the lands that they oversee, and how important those special characteristics are to all of us who live here.”

### Figure 5 Top Five Reasons for Doing Business in the Yellowstone Region

A survey conducted in Madison, Gallatin, and Park counties (Montana) asked business owners to rate the importance of 15 variables on their decision to conduct business in the region. At the top of the list were:

1. Scenic beauty
2. Quality environment
3. Good place to raise a family
4. Desire to live in a rural setting
5. Small-town atmosphere.

Other important variables included proximity to public lands, recreation opportunities, and a low crime rate. On the whole, these business owners considered these quality-of-life factors to be more important than traditional business climate variables such as tax structure and cost of doing business.<sup>13</sup>



**Kim Scurry, Bozeman**  
Sales Operations Director,  
Right Now Technologies

“I learned about this area while working for Yellowstone National Park. I later moved here because of the great access to the outdoors and all the recreational opportunities: camping, hiking, skiing, canoeing.

“Our customers say that Right Now is a different kind of company to do business with. I think that’s rooted in the company’s culture, which is rooted in the culture of the Yellowstone region and Montana. People are happy living here, and it shows in the attitude they bring to work.

“The region has also provided us with an international identity. Around the world, everyone knows Yellowstone, and now they associate it with us. We’re not just another software company—we’re the one that holds our annual user conference in the Rocky Mountains. Many of our customers will do anything to attend.”

“Ultimately, what attracted me to this area were the nearby world-class public hunting and fishing opportunities,” noted Matt Dowdell, employee of Native Sod in Livingston. Interviews with business leaders suggest many agree that hunting and fishing are key among the recreational opportunities they find so central to their quality of life.

In 2004, nearly one in five licensed big game hunters in Wyoming and Montana spent time hunting in the six-county Yellowstone gateway region. And in 2002, 168,000 anglers entered the park primarily to fish, while another 336,000 made fishing a part of their park visit.<sup>14</sup>



Skier watching elk in Upper Geyser Basin, Yellowstone National Park

(FRANK BALTHIS, COURTESY YELLOWSTONE NATIONAL PARK)

*Yellowstone National Park and surrounding wildlands provide key habitat for the region’s world-renown elk herds. Two-thirds of winter visitors to the park say that wildlife viewing is their primary reason for visiting. A quarter of all elk hunters in Wyoming and Montana hunt in Yellowstone’s gateway region.<sup>15</sup>*



## Communities throughout the West benefit from proximity to national parks and other protected public lands.

The 36-million-acre Greater Yellowstone region centers on a core of protected public lands. At the heart of this landscape lie Yellowstone and Grand Teton national parks, encompassing some 2.5 million acres of the region's wild country. Eleven million acres of Forest Service lands, including 13 wilderness areas, and 89,000 acres of national wildlife refuges and Bureau of Land Management parcels round out the region's core.<sup>16</sup>

For communities across the rural West, high-quality natural environments and economic success go hand-in-hand. This relationship is especially strong for areas near national parks and other protected public lands such as wilderness areas and national monuments. As a 2004 study discovered, other public lands close to protected areas are also strongly associated with rural economic growth.<sup>17</sup>

### Park Gateway Counties Outperform Other Areas

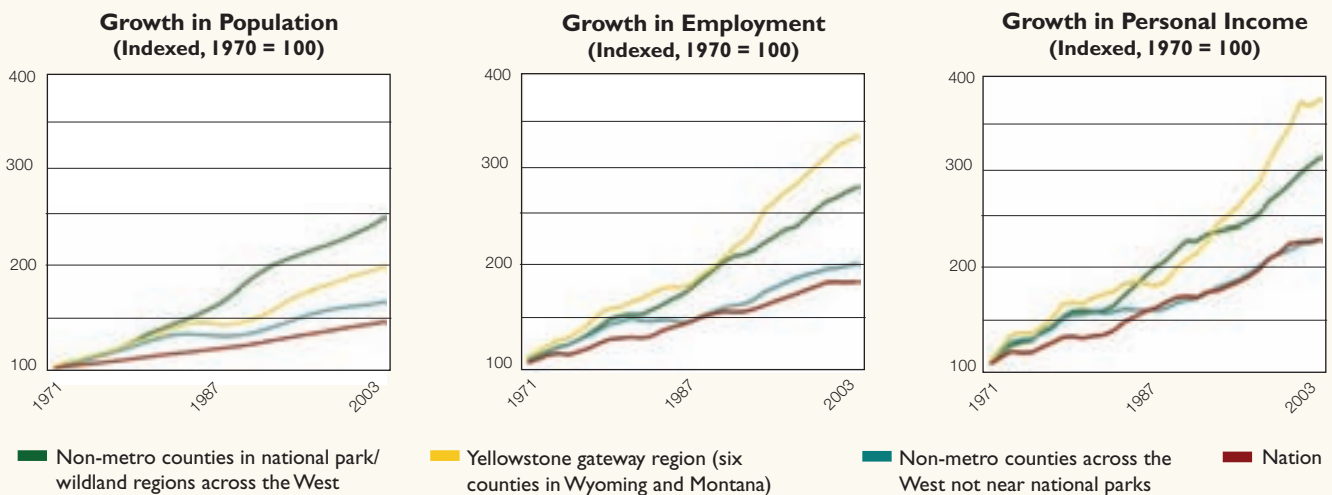
Counties in national park and wildland regions across the West do better, as a group, than their peers that do not enjoy access to these public lands amenities. This conclusion is similar to findings of other studies which suggest that proximity to these protected public lands may be one factor that supercharges economic performance.<sup>18</sup> (See Figure 6, below, and Figure 7, p. 16.)

Dramatic economic growth in Yellowstone's gateway region outpaces even that of other areas with a similar core of a national park and adjacent wilderness. From 1970-2003, each of these wildland regions surpassed the nation on key performance measures. (See Figure 8, page 17.)

*For community after community across the rural West, high-quality natural environments and economic success go hand-in-hand. This relationship is especially strong for areas near national parks and other protected public lands.*

**Figure 6 Economic Trends in Park vs. Non-Park Counties**

Proximity to national parks and their surrounding wildlands is linked to economic success. Across the West, there are 263 counties that are more than an hour drive from a metropolitan area. Of these, 52 surround major national parks, including the six counties in Yellowstone's gateway region. As a group, these counties outperform other non-metropolitan counties in the West that do not share access to national parks. Yellowstone's gateway counties surpass even their park peers on key measures. (See Figure 7, page 16, for counties included in the park peers and non-park peers groups.)



Source: U.S. Census, Bureau of Economic Analysis



Ennis, Montana.

(DONNIE SEXTON/TRAVEL MONTANA)

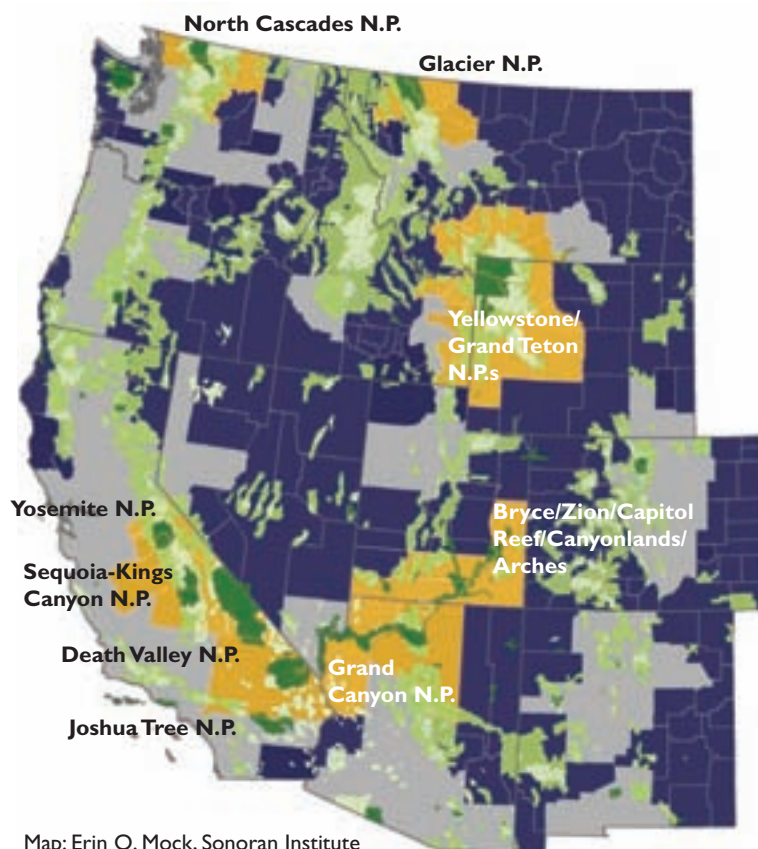
## Why are Park Neighbors so Successful?

What drives the economic success of these areas? A 2002 University of Montana study found that national parks are “magnets” for new residents. During the 1980s and 1990s, non-metropolitan counties near national parks attracted more new residents than similar areas without parks—and more people moved into these counties than moved out. During the 1990s, this “net migration” contributed more than five times as much to population growth in park counties than in their non-park peers.<sup>19</sup>

Park regions are not simply magnets for migrants. They are also attractive to existing residents, offering many of the natural amenities people say they want, such as recreational access, scenic beauty, a rural setting, and a high-quality environment. And these areas are magnets for new businesses and income sources, stimulated by long-time residents and newcomers alike.

Complexes of national parks and wildlands offer tracts of unbroken natural habitat for wildlife, another draw for residents and newcomers. Surveys of park visitors and area residents find consistent concern for protecting wildlife habitat, even for animals the respondents may never see.<sup>20</sup> As one Montana biologist suggested, many individuals regard “fish [and wildlife] as symbols of quality of life.”<sup>21</sup>

Figure 7 Park and Non-Park Peers of Yellowstone’s Gateway Counties



Map: Erin Q. Mock, Sonoran Institute

Across the western United States, 52 counties can be considered peers of Yellowstone’s gateway counties. These counties are adjacent to national park/wilderness complexes, but not near a metropolitan area.

Economically, these counties outpace the 211 counties in the west that are similarly removed from metro areas but do not enjoy proximity to these public lands. (See Figure 6, p. 15 for more detail.)

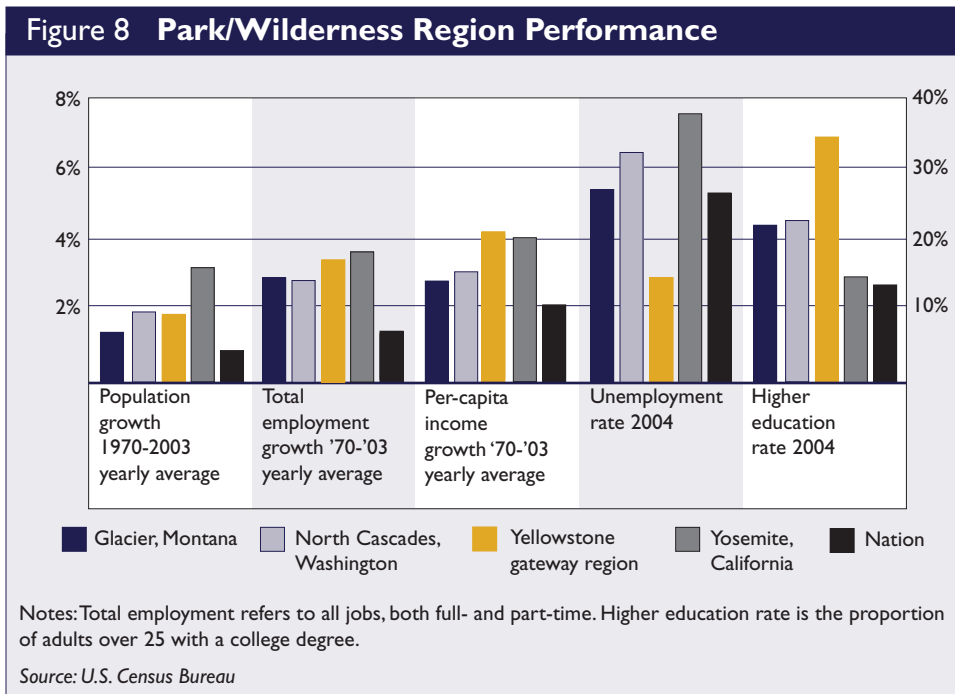
- Yellowstone gateway region and similar counties adjacent to national park/wildlands complexes
- Peer counties that are not adjacent to national park/wildlands complexes
- Metropolitan counties or counties within 1-hour drive of a major city.
- National Park Service land
- Wilderness areas
- U.S. Forest Service land, other than wilderness

## Other Influences on Economic Success

Proximity to national parks and wildlands is a tremendous, positive influence on economic performance in communities across the west. Other major factors linked with economic success include:

- Proximity to an airport with daily commercial flights;
- Prevalence of producer services (engineering, finance, business, architecture, and other “white collar” jobs);
- Ski resorts;
- Education level;
- The presence of mountains, regardless of protected status.<sup>22</sup>

These characteristics give Yellowstone’s gateway region an additional economic advantage.



Emigrant Peak, Paradise Valley, Montana (JIM PEACO, COURTESY YELLOWSTONE NATIONAL PARK)



**Deb Larson, Bozeman**  
Owner, Interior Environments

“I design interiors for commercial establishments, so I keep my finger on the pulse of who’s new in the area. Growth in retail and professional services is strong, especially among people who move here and set up businesses that serve locals—not primarily tourists.

“The outstanding environment here is good for my business. Most of my clients are people coming to the area seeking the same kind of quality of life I looked for when I decided to move here—things like easy access to skiing, biking, and fishing.

“Yellowstone National Park is the region’s crown jewel. Of all of our spectacular natural areas, it most represents the natural treasures that define this area.”

## Finding 4



### Lyndy Cain

#### West Yellowstone

Owner, Firehole Ranch

“Yellowstone National Park is a vital resource for the whole area. It is a sanctuary that provides critical habitat for our region’s wildlife and fish populations. And that’s what makes my business prosper. My business depends on the quality of our blue-ribbon fisheries, especially the Madison, which flows out of Yellowstone.

“Most of my clients come from out of state for the Montana fly-fishing experience. Yellowstone is crucial to my business because of the fly-fishing opportunities it offers. All things flow from the park—wildlife, rivers—and we are all connected to it both environmentally and economically.

“Many of our visitors build a relationship with the region that lasts a lifetime. It is essential that we protect not only the park but also important public lands and the watersheds that our region’s fisheries and wildlife need to survive.”

## Yellowstone National Park is the region’s ecological core and an anchor for its thriving economy.

Starting with Yellowstone Acupuncture and ending with Yellowstone’s Edge RV Park, listings for Yellowstone’s namesake businesses occupy a page and a half in the telephone book that covers Montana’s share of the gateway region.

### Yellowstone is the Region’s Ecological Core

Yellowstone National Park is known around the world, and for good reason. Researchers widely agree that the park and the surrounding region represent one of the world’s best opportunities to preserve an intact temperate ecosystem.<sup>23</sup> Yellowstone adds ecological richness to the ecosystem, and is internationally recognized as a Biosphere Reserve and a World Heritage Site.

Yellowstone and its surrounding wildlands (including 3.9 million acres of federally designated wilderness) are home to the largest grizzly bear population in the lower 48 states and two other species on the federal threatened species list: the bald eagle and the lynx. Gray wolf reintroduction in 1995 restored the full complement of large mammals from pre-settlement times.

Yellowstone is the only place in the country where bison have continuously roamed wild. It provides summer habitat to some 25,000 elk in seven different herds. Elk conceived and born in the park during the summer form the heart of the region’s abundant elk populations.

With its headwaters just south of the park, the Yellowstone River is the longest free-flowing river in the United States. The Snake River heads here, too; as do two of three rivers that join to form the Missouri River. The park contains a near-pristine aquatic system, home to 11 native fish species, including cutthroat trout, Arctic grayling, and mountain whitefish, all of which support sport fisheries.<sup>24</sup>

### Yellowstone’s Influence on Business

Although the park’s influence differs depending on the type of company and its location, many business owners interviewed for this report believe the region’s environment—including Yellowstone—benefits area businesses. Some described the park as a central feature of the region; some referred to it as the region’s “epicenter” or “magnet.”



Gardiner, Montana, with the Roosevelt Arch at Yellowstone’s north entrance in foreground.

(PAM CAHILL, YELLOWSTONE ASSOCIATION)

## Figure 9 Yellowstone's Ecological Wealth

The Greater Yellowstone ecosystem hosts a tremendous diversity of plants and animals—in a variety of habitats ranging from river bottoms to alpine high country, hydrothermal areas, and forested slopes.

In Yellowstone National Park alone:

61	Mammal species
320	Recorded bird species (148 of which nest here)
11	Native fish species
10	Species of reptiles and amphibians
1,098	Native vascular plant species recorded
186	Lichen species
406	Species of thermophiles (primitive microorganisms) <sup>25</sup>

In West Yellowstone and Gardiner, business owners tend to view their communities as completely dependent upon the park. Further from the park's boundaries, the connection is less complete but still strong.<sup>26</sup>

Even in communities more removed from the park, many interviewees concurred with Butch Keyes, owner of Crazy Mountain Construction in Livingston: "There's an indirect link between Yellowstone and economic growth throughout the region. I'd say ninety percent of my customers visited first—a lot of them drawn by the park—and then decided to build a home. These people support a lot of other local businesses, too, furnishing their homes and paying for the basics of living."

### Yellowstone Draws Tourism Benefits

Yellowstone vies with Glacier National Park for honors as Montana's top attraction for vacationers. In 2001, almost half of all summer visitors to the state visited Yellowstone National Park.<sup>27</sup> Yellowstone is the most popular tourist destination in Wyoming. Four of the state's top five tourist attractions are there—Old Faithful, Yellowstone Lake area, Grand Canyon of the Yellowstone, and Mammoth Hot Springs.<sup>28</sup>

In 2004, forty percent of earnings and 34 percent of jobs related to travel and tourism in Wyoming were in the two Yellowstone gateway counties: Park and Teton.<sup>29</sup>

In 2003, visitors to Yellowstone spent over \$268 million in the park's closest gateway communities (within a radius of approximately 30 miles), creating \$79 million in personal income and 5,437 jobs. As these dollars circulated through the local economy, secondary effects created an additional \$37 million in personal income and 1,433 jobs.<sup>30</sup>

*Many business owners interviewed for this report view Yellowstone National Park as a central feature of the region, describing it in terms such as the region's "epicenter" or "magnet."*

**Three of many species that rely on park and wilderness areas in the Yellowstone region:**



Grizzly Bear



Gray Wolf (JIM PEACO)



Wolverine

(PHOTOS COURTESY YELLOWSTONE NATIONAL PARK)

Researchers have found that these and other species tend to avoid areas with high densities of roads and trails, and spend most of their time in the region's park and wilderness areas. These protected areas are critical "source" areas for these species—where populations can survive, reproduce, and populate surrounding zones. Continued development on private and public lands around the protected core may greatly reduce both distribution and population size.<sup>31</sup>



**Lee Haines, Cody**  
Director of Public Relations,  
Buffalo Bill Historical Center

“There is a vastness to Yellowstone National Park, and a solitude. One gets the sense that it is still very much as it was before humans. It’s an important place today because people can still experience wildlife there.

“Yellowstone is clearly a big draw for this region. Just under 50 percent of the Center’s visitors came to the area specifically to visit the park. We’re the fourth largest employer in Cody, and 40 percent of our revenue comes from admissions and the store café. To say that the draw of Yellowstone is important to our organization and the community is an understatement.

“The park is the heart of the region—its icon. It symbolizes wildness, uniqueness, the quintessential America.”

## Employment and Other Benefits

More than 400 local residents work in permanent Park Service positions at Yellowstone, as well as some 160 seasonally.<sup>32</sup> Park concessions provide additional employment, and contribute to the local economy in other ways. In 2006, Xanterra, the main park concessioner, will purchase 16,000 pounds of beef from Montana producers.<sup>33</sup> The Yellowstone Association and Yellowstone Park Foundation both donate funds to the park for purchases from local businesses, including printing the widely-distributed park newspaper.<sup>34</sup>

The park provides direct assistance to adjacent communities through mutual aid agreements to help with law enforcement and other emergency needs. In 2005, 213 park research permits brought researchers from 40 states and nine countries to Yellowstone, including some 65 from the local area.<sup>35</sup> In addition, educational, conservation, and other nonprofit organizations hire local staff to focus on the park and its surrounding environs.

These direct impacts are important to communities around the gateway region, and even critical to some. But in most parts of the region, the appeal of the remarkable landscape to long-time residents and newcomers has far more dramatic economic effects.



Yellowstone National Park employs more than 400 local residents in permanent positions, and some 160 more seasonally.

Ranger Dan Ng in Upper Geyser Basin. (ED AUSTIN/HERB JONES, COURTESY YELLOWSTONE NATIONAL PARK)

*In most parts of the region, the appeal of the remarkable landscape to long-time residents and newcomers has far more dramatic economic effects than jobs and income generated by the park.*

## Yellowstone’s wildlife generates significant economic value for the area.

Many gateway region businesses brand their products and services using Yellowstone’s abundant wildlife as a central focus. Search the Internet, and one finds Las Vegas businesses disproportionately linked with gambling, Denver with skiing, and Orlando with Disney. Similarly, Internet research reveals that businesses in this region use wildlife-related words and images proportionally more than those in many other communities, including wildland havens such as Moab and Green River, Utah, and Estes Park, Colorado.

Even among communities in Wyoming and Montana—two states strongly associated with wild areas and wildlife—businesses in the Yellowstone area make better use of those connections in their Internet marketing. Of the ten Montana and Wyoming communities whose businesses link themselves most closely with wildlife, five are in Yellowstone’s gateway region<sup>36</sup> (see Figure 9).

### Wildlife Draws Visitors

These businesses are onto something. The appeal of Yellowstone’s gateway region is directly connected to the wildlife that inhabit its spectacular landscapes.

Wildlife viewing or photography is the primary attraction for nearly a third of summer visitors to Yellowstone National Park. And in the spring and winter, when businesses in gateway communities most need customers, these wildlife-related activities are even more important. Watching or photographing wildlife is the primary activity for half of winter park visitors, and two of five spring visitors.<sup>37</sup>

In 2004, an estimated nine percent of all nonresident travelers’ expenditures in Wyoming and Montana were directly attributable to wildlife watching. Travelers making wildlife viewing trips spent more than \$82 million in Yellowstone’s gateway region that year.<sup>38</sup>



**Richard Parks, Gardiner**  
President, Gardiner Chamber of Commerce

“Yellowstone National Park and its wildlife define Gardiner.

“We’re the only year-round entrance to the park, and among the few towns in the country that can claim boasting rights to regular visits from Yellowstone’s world-renown elk herds, bison, deer, and bighorn sheep. Occasionally, moose and bear are sighted in the canyon above Gardiner. Winters bring bald eagles to the Yellowstone River, which runs right through town and offers one of the best native fisheries in the West.

“It’s impossible to overstate the importance of the park and the abundant wildlife to Gardiner, and that holds true in some measure for the whole region.”

**Figure 10 Top Ten Montana and Wyoming Communities for Businesses Associated with Wildlife**

Yellowstone’s gateway region stands out among Wyoming and Montana communities for business links to wildlife. A study using Google™ searches with “branding words” such as wildlife, hunting, fishing, wilderness, elk, deer, bear, wolf, and grizzly reveals that high percentages of business web pages use these words and images to attract potential customers. (Gateway region towns in italics.)<sup>39</sup>

Community	% of web pages containing wildlife branding words
<i>West Yellowstone, MT</i>	62%
<i>Red Lodge, MT</i>	53%
<i>Jackson, WY</i>	51%
<i>Livingston, MT</i>	48%
Dillon, MT	41%
Sheridan, WY	40%
Hamilton, MT	40%
Cody, WY	40%
Anaconda, MT	36%



**Carl Swoboda**  
Livingston

Director of Operations,  
Safari Yellowstone

“If it weren’t for the wolves I probably wouldn’t be in business. Before the wolf reintroduction, our staff included one person who was barely making it, and now we have a staff of three to five, year ’round.

“Ninety percent of the people who come here want to see wolves—clients come here from Spain, England, Switzerland, and France, and there’s a huge economic impact. They’re flying in, eating in our restaurants, and staying in our hotels or rental homes.

“Ten years ago, a handful of groups were offering these types of trips. Now more than 50 different organizations are involved.”

**Hunting and Fishing—Big for Residents and Visitors**

Outstanding big game populations in Yellowstone’s gateway region attract a disproportionate share of hunters. The six counties are home to eleven percent of the population of Montana and Wyoming, yet attract one quarter of all elk hunters in the two states. Twenty percent of the state’s moose hunters hunt here, as do 40 percent of bighorn sheep hunters.<sup>40</sup>

In 2001, resident and nonresident big game hunters spent over \$26 million on trips to Yellowstone’s gateway region. Some of the additional \$26 million they spent on equipment was also spent in local communities.<sup>41</sup>

In the mid-1990s, some 85,000 anglers spent about 400,000 angler days per year fishing in Yellowstone alone, spending over \$32 million locally.<sup>42</sup> Outside park boundaries, fishing brings even more economic activity to the region. In 2003, residents and visitors put in over 1.1 million angler days in Montana’s four gateway counties.<sup>43</sup>

Because anglers are willing to pay more than they do for their fishing trips, some researchers suggest that the economic benefit associated with recreational angling far surpasses these direct expenditures. According to one estimate, Yellowstone’s trout streams should be valued at more than \$237 million per year, based solely on what recreational anglers would be willing to pay to fish them.<sup>44</sup>

**Figure 11 Wildlife Motivates Locals to Visit Yellowstone**

When locals visit Yellowstone National Park, it is often to see wildlife. In 2005, gateway region residents said seeing the following species was a reason for visiting the park.<sup>45</sup>

Black bears or grizzly bears	77%
Elk	67%
Wolves	63%
Bison	57%



**Left:** Wildlife watchers in Yellowstone (TIM STEVENS) **Right:** Pronghorn antelope (J.R. DOUGLASS, COURTESY YELLOWSTONE NATIONAL PARK)



### The Yellowstone gateway region's most important economic assets are threatened.

Residents and visitors alike agree that the Yellowstone region's beautiful landscapes and abundant wildlife lie at the heart of the area's appeal. But the expanding impacts of a growing population are already creating problems and prompting concern for the future. And other forces threaten the most precious of the region's assets: its quality of life and natural environment, wildlife, and the national park that lies at its heart.

#### Changes Spark Concern

Repeat visitors to Yellowstone National Park are already noting declines in the surrounding Montana landscape. In a 2001 study, one out of four repeat visitors surveyed noted a loss of open space. The top reason visitors gave for their Montana vacation? Visiting open and uncrowded spaces.<sup>46</sup>

Residents see changes, too. Some business leaders interviewed worry that increasing use of public lands will lead to more limits on usage or crowded trails and streams. Another common concern is that continued development on private land will limit recreational opportunities. "No Trespassing" signs, some fear, may restrict traditional access routes to public lands or bar hunting or stream access on private lands.

Some business owners agreed with Joan Watts' concern that area growth will eventually affect her customers' experiences. Watts owns The Blue Winged Olive, a Livingston area bed and breakfast offering fly fishing services. She noted, "As our community boundaries expand, I think we could see local restrictions on rural 'Montana' things such as keeping horses. I'm also concerned that traffic will get worse, and the area will become overcommercialized. New migration has been good for local businesses, but eventually the drive to the park will feel more like a trip through a subdivision than a gateway to wilderness."

Another trend that concerns business leaders is the rising cost of housing. Peter Christ, owner of Bridge Creek Backcountry Kitchen and Wine Bar in Red Lodge, explained, "It is becoming increasingly difficult to attract employees because of the rising cost of living here. Affordable housing will be the most important issue facing my community in the coming years."



**Laurie Francis**

Livingston

CEO, Community Health Partners

"I moved here years ago because of the wide-open spaces, the small population, and the incredible natural environment. I appreciate the wilderness areas, clean air, and easy access to hiking and biking.

"It has been easy for us to attract a great staff at the clinic. But as the cost of living increases, the saying, 'You can't eat the scenery,' applies more and more. No matter how fantastic it is to live here, people still need to be able to pay their bills.

"Growth is a two-edged sword. Many jobs don't provide health insurance, especially in tourism and construction. Wages aren't keeping up with the skyrocketing cost of health insurance. At the clinic, we see over 1,000 new patients without insurance each year. People go without regular health care, and wait for an emergency. Too little care, too late—it's a problem here and around the country."



Ranchlands help keep the region's spaces feeling wide open. They also provide crucial wildlife habitat. American Farmland Trust includes five of six gateway-region counties on its list of 25 western counties where high-quality ranchlands are most threatened by residential development.<sup>47</sup>

Paradise Valley Ranch near Emigrant, Montana (DONNIE SEXTON/TRAVEL MONTANA)



**Chuck Schwartz**  
Bozeman  
Wildlife Biologist

“One of this region’s greatest treasures is its diversity and abundance of wildlife. Although Yellowstone National Park seems quite large, many of its wildlife species, especially carnivores and ungulates, require lands outside the park to survive. Public and private lands are interconnected when it comes to quality of wildlife habitat.

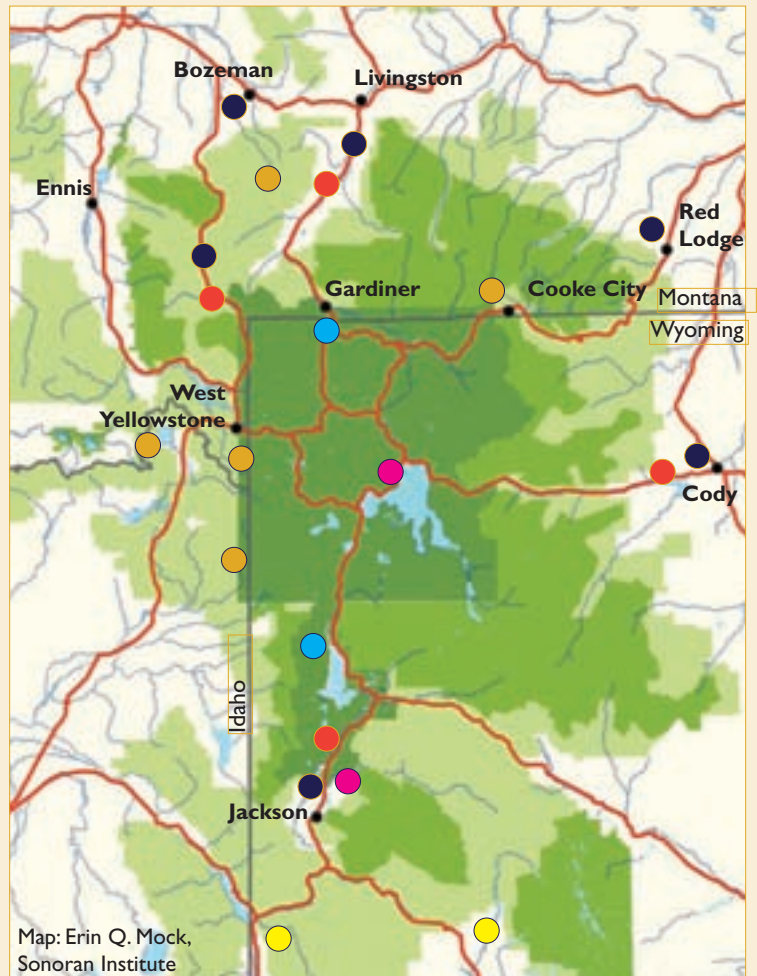
“To the casual observer, our communities seem surrounded by plenty of open space and public lands. But neither the future of our wildlife populations nor the region’s ecological integrity are ensured. On public and private land, we need to safeguard important habitat, like elk winter range, and songbird- and riparian habitats.

“Maintaining a network of secure interconnected habitats requires an ongoing effort, made even more important by the economic value of Yellowstone’s wildlife and the rapid development we’re seeing in our region.”

## Figure 12 Threats to Yellowstone National Park Resources

Air, water, and wildlife freely cross park boundaries, elevating the importance of regional activities to the protection of Yellowstone’s world-class resources. These are some major threats to park resources.

- **Residential development** Often done without careful consideration of ecological effects, residential development threatens to encroach on key riparian and seasonal habitat. Development can lead to more conflicts between humans and wildlife.<sup>48</sup>
- **Human/wildlife conflicts** Failure to secure pet food and garbage creates conflicts with wildlife, such as bears, and frequently leads to their death. Collisions with vehicles cause many unnecessary wildlife deaths.<sup>49</sup>
- **Invasive species and disease** Non-native species and diseases threaten native species such as whitebark pine (blister rust) and Yellowstone cutthroat trout (whirling disease and lake trout). The decline of these crucial food sources could pose problems for species such as grizzly bears.  
  
Detected in Wyoming, chronic wasting disease could spread rapidly through the region’s elk herds and into the park. Winter feeding and interruption of migration routes around Jackson concentrate elk herds and increase risk.<sup>50</sup>
- **Inadequate funding** Funding shortfalls impair natural and cultural resource-protection programs in Yellowstone and Grand Teton, as well as maintenance, law enforcement, and visitor services.<sup>51</sup>
- **Degraded public lands** Excessive road building and motorized use, as well as violations of area closures, disturb wildlife, and diminish habitat quality.<sup>52</sup>
- **Oil and gas development** Road and infrastructure development threaten the longest ungulate migration in the lower 48 states. If not done correctly, development will threaten air quality in Grand Teton and Yellowstone.<sup>53</sup>



■ National Park Service    ■ U.S. Forest Service  
■ Wilderness     Private & Other    — Highway

## Loss of Wildlife Habitat

Loss of fish and wildlife habitat would ripple into the heart of the region's economy. As the ecological core, Yellowstone National Park and the surrounding wilderness areas and other public lands protect essential habitat. But wildlife also depends on the private lands that surround this protected core of mostly higher elevation terrain. A recent study in the Yellowstone area found that elk winter range, streamside habitat, and other ecologically important areas are concentrated on private land.<sup>54</sup>

Development at the edge of public lands—among the most desirable private land in the region—can fragment habitat, making it more difficult for many species to survive. It also can cut off access to winter range for pronghorn antelope, moose, elk, and mule deer.<sup>55</sup> Because lowland habitats are rare within Yellowstone, the survival of park populations of species such as grizzly bears and some songbirds may also depend on protecting their habitat on public and private land outside the park.<sup>56</sup>

Another study noted a broad range of activities that can disrupt wildlife habitat. These include inappropriate resource extraction, roads, housing and related activities, and disruptive recreational uses on public and private land.<sup>57</sup>

## Threats to the Region's Core: Yellowstone National Park

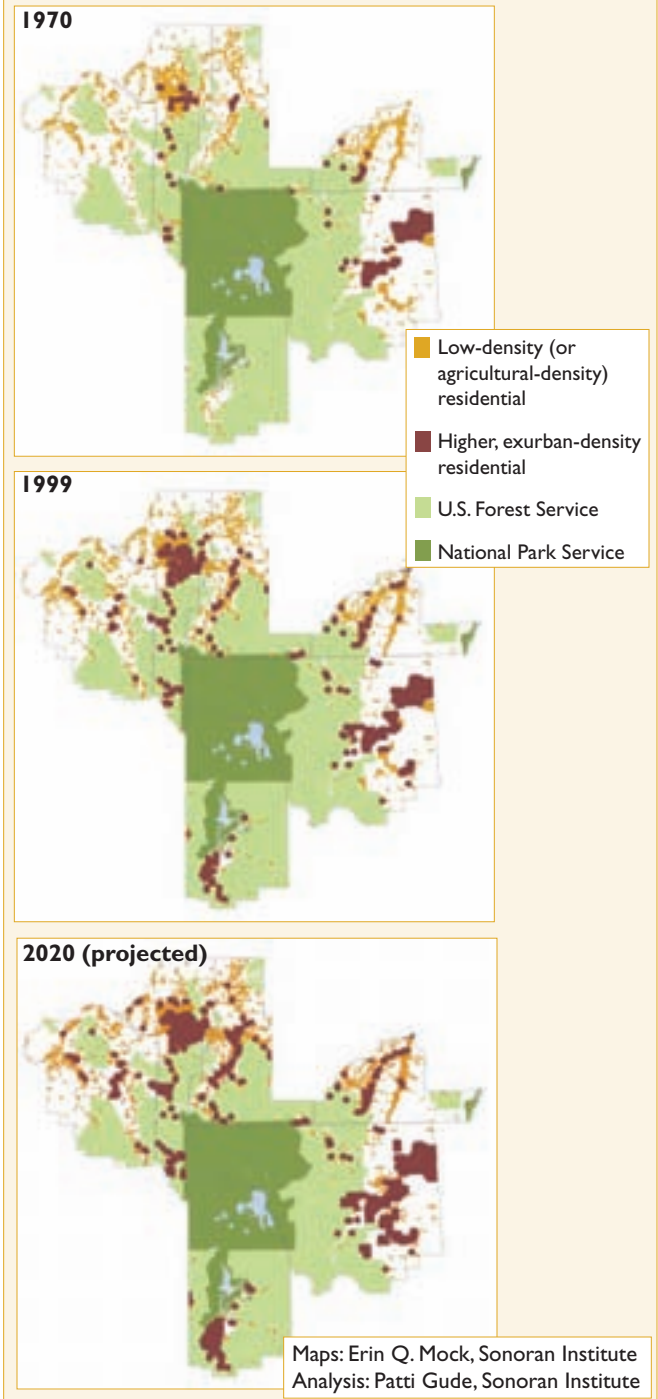
In 2002, Yellowstone's operating budget fell 35 percent short of covering functions park management deemed critical for daily operations.<sup>58</sup> (See Figure 14, page 26.) Chronic underfunding has left operating budgets short and caused needed maintenance, construction, and other investments in park assets to be delayed. Nationwide, the Congressional Research Service estimates these delayed investments amount to between \$4.5-\$9.7 billion.<sup>59</sup>

This decades-long pattern of underfunding makes it difficult for park staff to protect the resources entrusted to their care and provide safe, enjoyable experiences for nearly 3 million visitors each year. Funding shortages touch nearly every area of park operation, leading to, for example:

- A severe shortage of staff to monitor, inventory, study, and educate people about the park's wildlife and geothermal, archeological, and historic sites. The park has one geologist on staff, one archaeologist, and one ornithologist. Money from private organizations funds critical wildlife programs, including wolf research and monitoring efforts.
- Inadequate law enforcement, emergency medical, search and rescue, and fire-fighting services. The park's ability to protect some 950 historic structures from fire fails national standards. In 2004, a record-setting 900 "bear jams" clogged Yellowstone's roads, forcing the park

Figure 13 Residential Development in the Gateway Region

Much of the region's growth is taking place in rural areas, outside incorporated towns. These maps show the spread of residential development into areas that were formerly sparsely populated farmland and forest, marking a loss of the open space that underpins the region's rural feel and quality of life and provides wildlife habitat.<sup>60</sup>



**According to a 2005 survey of likely voters...**

47% are unlikely to return to a national park where the visitor center, roads, restrooms, and campgrounds were in poor condition.

72% say interpretive rangers are important to them and their families, to answer questions, give ranger walks and talks, and lead campfire programs.<sup>64</sup>

**In 2002, Yellowstone's budget...**

Fell \$2.2 million short for maintenance, mostly in the area of roads.

Was \$1.4 million short for the interpretive division, which operated with only half the needed funds.<sup>65</sup>

to divert staff from other programs in order to fill a shortage of law-enforcement personnel. That year, the park employed 54 permanent law enforcement rangers, down from 62 in 1998.

- Inability to implement a preventive maintenance program for the park's crumbling roads and aging fleet of vehicles and equipment.<sup>61</sup>

Other challenges threaten the ability of park managers to preserve Yellowstone's resources "unimpaired" for the future, as required by the act that created the National Park Service in 1916. In 2005, the Department of the Interior proposed changes to Park Service management policies that would favor recreational development, commercialization, and privatization. This direct threat to the mandate for preservation that guides park decisions is a reminder that federal protection of park resources is not a given.<sup>62</sup>

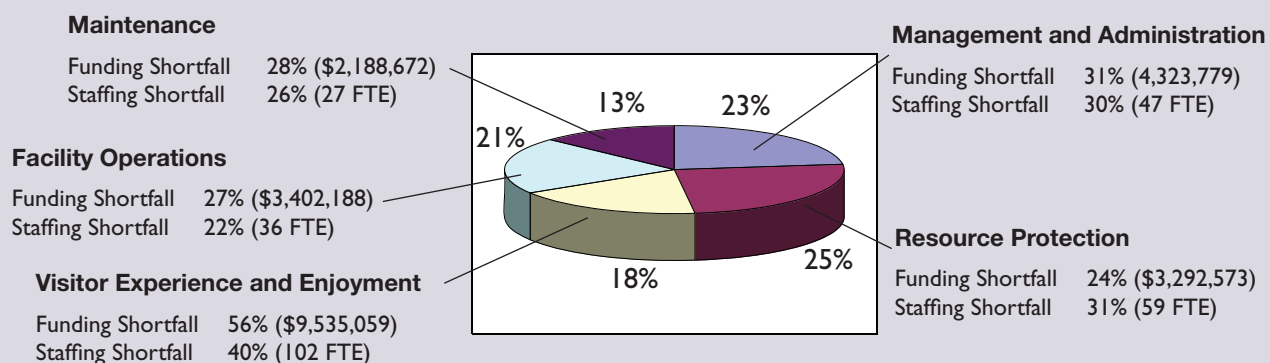
**Spillover Effects and Lack of Coordination**

Decisions made in one place can have profound effects in other parts of the region, yet coordinated decision-making is more often the exception than the rule. Land-use policies in one community can have spillover effects, pushing development to nearby areas with different rules. Park management decisions touch surrounding communities. How public lands around the park are managed can affect park wildlife populations. Development in one area can squeeze wildlife to other areas, or even fragment habitat into smaller, disconnected tracts, lessening its quality.

Community residents are often divided over matters that affect their future and the health of the natural assets so key to this region's economy. A 2005 economic development study for park gateway communities found that lack of cohesiveness among community members and poor relationships with other communities and government agencies were complaints common to each community.<sup>63</sup>

**Figure 14 Yellowstone National Park Operating Budget, FY2002 Funding Shortfalls**

In fiscal year 2002, Yellowstone's operating budget fell short nearly \$23 million (35 percent), leaving park staff unable to fulfill basic functions in every area of park operations. Especially hard-hit was the "Visitor Experience and Enjoyment" category, which ran on less than half of budgeted funds. This category includes functions critical to ensuring visitors' safety and enjoyment, such as education, interpretation, and visitor safety services.<sup>66</sup>



Notes: Percentages shown on chart are of total FY2002 operating budget. FTE, or "Full-Time Equivalent," measures staffing requirements.

Source: Yellowstone National Park Business Plan

## Our Region, Our Responsibility

Yellowstone's gateway region is blessed with spectacular scenery, abundant wildlife, and fantastic outdoor recreation. In no small measure, these qualities can be traced directly to the fact that the region is focused around a core of wildlands with Yellowstone National Park at its heart. As *Gateways to Yellowstone* demonstrates, that link is integral to the area's thriving economy.

But this report also demonstrates that the qualities underpinning this region's supercharged economic performance and its culture are increasingly at risk *precisely because of* their magnetic appeal. The economy is thriving, the population is booming, and amidst all that success, great care is required to protect what is most precious about this place.

Is there much doubt about the core of our common preferences for the future? Our shared vision is one in which our local streets are uncongested, our shops and businesses successful, our communities safe and friendly, and our schools uncrowded and top-notch. In this vision, we do not see ourselves competing with hundreds of others for limited access to rivers and trails, nor do we see our open spaces and vistas filled with sprawling growth.

In this shared vision for the future, the wildlife that are part of our daily lives now are just as abundant and diverse. We recognize the landscape. The whole suite of natural assets that underpins both our love of this region and its economic success is protected. Foremost among these, Yellowstone National Park is well preserved and equally well funded.

This vision cannot be achieved without a shared commitment and a shared investment. That commitment must originate with those of us who live here. The qualities of life we enjoy, and that we are able to pass on to our children, will be determined by the depth of our leadership and the extent of our engagement. The following four recommendations offer a framework—a starting place—for this investment in the future.

### I. Maintain the Integrity of the Region's Core

Adequate federal funding and renewed investments to make up for years of shortfalls are essential to ensure the integrity of Yellowstone National Park. Without them, the park will not be able to meet visitor demands and protect its unique resources from threats such as invasive species and disease.

- Unified by their shared interest in protecting a common asset, local leaders should push for funding adequate to protect park resources and maintain high-quality visitor experiences.
- Community leaders should protect their long-term interests by supporting park management in making decisions aimed at protecting Yellowstone's resources and ecological integrity. They must also speak up to uphold the policies—based on the Organic Act of 1916—that guide protection of park resources.



**Craig Matthews**  
West Yellowstone

Owner, Blue Ribbon Flies

“Yellowstone National Park management decisions do have ripple effects that touch the communities of this region, especially those closest to park boundaries. Sometimes, in a place like West Yellowstone, it's easy to feel like the park should take more account of these impacts.

“But the park's foremost mission is to protect its wild places and wildlife, and the other resources that make the park unique in all the world. That's the best thing it can do for this region's economy in the long run.”



## Gwen Williams

### Red Lodge

Owner, Williams Consulting

“Yellowstone National Park provides the ‘wild’ for this region, and Red Lodge certainly depends on that. But we’re more diverse than just a simple tourist town.

“As the local economy grows, businesses need to focus on taking care of what makes this region tick. The biggest of these things is the area’s environment—the park, the forest lands, the rivers and streams.

“We need to protect and encourage agriculture, and manage new building so the area maintains its rural feel. Our small-town atmosphere, historic downtown, and sense of community...all the things we most love about Red Lodge are the things that attract others here, too.”

## 2. Protect Important Wildlife Habitat

Wildlife play a central role in the region’s economy. Maintaining high-quality habitat on public and private land must be a common goal for area communities and land managers.

- Whether proposing or reviewing a new subdivision or evaluating major proposals for projects on public lands, communities and government agencies should share a commitment to a common set of conservation priorities. These priorities should include protecting important habitats such as riparian areas, winter range, and migration routes, as well as aim to keep large blocks of habitat intact.
- Local governments and community groups should work with landowners to reduce the potential for wildlife conflicts through means such as proper storage of pet food and garbage, and wildlife-friendly fencing.

## 3. Think Regionally and Act Regionally

An extensive study in the Yellowstone region found that it is possible to accommodate growth and development *and* preserve the region’s open agricultural spaces, natural areas, wildlife, air quality, and clean water. However, existing land use policies are not sufficient. The study found that new tools and, importantly, a new level of coordination among the region’s counties and communities are indispensable.<sup>67</sup>

Getting a handle on development is just one example of issues that connect Yellowstone’s gateway region. These unifying issues require communities and government agencies to make a whole-hearted commitment to collaborative action. Trace nearly any of the region’s challenges forward to a solution, and along the way you are likely to find new partners working toward common purposes.



**Left:** Red Lodge, Montana. (VICTOR BJORNBERG/TRAVEL MONTANA). **Right:** Elk at Norris Geyser Basin. (GEORGE MARIER, COURTESY YELLOWSTONE NATIONAL PARK).

*The economy is thriving, the population is booming, and amidst all that success, great care is required to protect what is most precious about this place.*

- Leaders from Yellowstone’s gateway region should engage in a broad regional dialogue to explore the best ways to protect—and benefit from—the region’s common assets. Area chambers of commerce, elected officials, and community and economic development groups could play a central role.
- This dialogue should spawn a collaborative process for addressing issues that cross political boundaries. Habitat protection, land-use planning, regional transportation planning, and economic development are examples of issues that require a forum for cooperation that does not currently exist.
- Public land managers and resource managers must make their management directions more seamless among the many jurisdictions that steward the region’s natural assets. Private landowners need to act as, and be welcomed as, partners in conservation and land management.

#### 4. Take the Lead

Yellowstone’s gateway region enjoys a tremendous depth and breadth of community leadership. In official and unofficial capacities, these leaders must carry the vision of a region in which a healthy economy and a healthy landscape coexist.

- Elected officials must recognize and understand the essential economic role of wild landscapes and wildlife, and make conservation of these resources a central focus of their decisions.
- The coalition of individuals and groups that advocate conservation of open spaces, habitat, and natural areas should reach out to find common cause with businesses, civic groups, and community leaders who share their interest in protecting the region’s natural assets.

#### Investing in the Region’s Future

The special appeal of Yellowstone’s gateway region—and the continued success of its communities—is not ensured. Along with tremendous popularity come challenges that threaten the foundation of the area’s equally tremendous economic vitality.

Bold leadership and a focused, regional effort will be essential to directing the momentum of growth and protecting the long-term health of these natural assets. Business, community, and government leadership will be indispensable in building the broad commitment and new collaboration from which this investment—of time, vision, and money—will come.



**Steve Kirchoff**  
Bozeman  
City Commissioner

“Bozeman’s hot right now, and that’s making me a little uncomfortable. What happens when you become popular and you’re not prepared for it?”

“I think we can pull it off, growing in such a way that ensures a diverse economy, affordable housing, and an unspoiled environment. Our town’s strong tradition of participatory government will help. People argue *together* here. That will help.

“People move to Jackson to have the second home and ski. People move to Bozeman to live. That’s what I want to keep. And it’s what I’m afraid we might lose.”

#### For More Detail about Your Community

In telling the story of the economic importance of this area’s natural amenities, *Gateways to Yellowstone* necessarily focuses on how the region, as a whole, is performing. If you would like to explore how your community is faring, detailed profiles are available online for:

- Carbon, Gallatin, Madison, and Park counties (Montana);
- Park and Teton counties (Wyoming); and
- Bozeman, Cody, Gardiner, Jackson, Livingston, Red Lodge, and West Yellowstone.

These profiles are available to download at [www.npca.org/northernrockies/gateway](http://www.npca.org/northernrockies/gateway). You will also find a link there to create profiles for communities other than those listed.

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Responsibility**

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## An Explanation of Terms

**Amenity** — A quality or feature that adds perceived economic value, such as climate, proximity of natural areas, or a particular community characteristic.

**Gateway community** — A town or group of towns that provides access to public lands, such as national parks, as well as services to visitors.

**Inflation-adjusted (real) dollars** — For analysis and presentation of economic change, dollar amounts are adjusted to remove the effects of inflation, providing a true base of comparison.

**Median income or price** — To arrive at median family income for an area, imagine listing all of the families in the area according to the total amount of income they receive each year from all sources. The income figure in exactly the middle of that list is the median family income. Median home price would be the price in the middle of a listing of all home prices in an area.

**Net migration** — The difference between the number of people moving their permanent residence to an area and the number moving away.

**Non-labor income** — Income from sources other than jobs or proprietorships, including dividends, interest, rent, retirement benefits, and government payments such as welfare.

**Per-capita income** — The average income per person in an area, calculated by adding all income received by all residents, regardless of age, and dividing by the total number of residents.

**Total personal income** — All money received from all sources by all individuals in an area.

**Sector, Sub-sector** — A sector is a major category into which economic activity is divided (e.g., manufacturing, construction, services). A sub-sector is a smaller economic division within a sector (e.g., the services sector comprises activity in a number of areas including health care, business services, auto repair, and so forth).

**Total employment** — Income from all jobs and proprietorships.

**Unemployment rate** — The number of people who are not employed but actively seeking work, as a percentage of the total adult population capable of working.

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**JOAN WATTS**  
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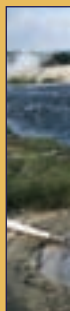
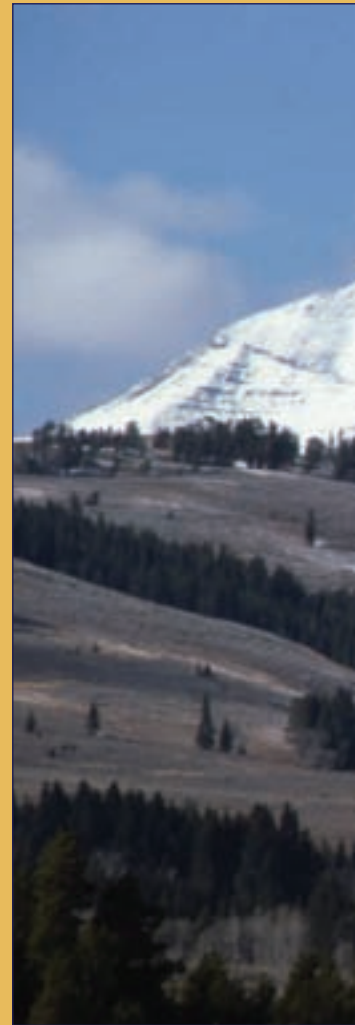
**GWEN WILLIAMS**  
Williams Consulting  
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**TIM YOUNG**  
NPCA Grand Teton  
Field Office  
Jackson, WY

In 2005, the National Parks Conservation Association commissioned four studies to explore the roots of the Yellowstone region's tremendous economic success. These studies offer a new view of the underpinnings of this remarkably diverse and healthy economy, and provide the foundation for *Gateways to Yellowstone: Protecting the Wild Heart of Our Region's Thriving Economy*.

Yellowstone's gateway region is blessed with spectacular scenery, abundant wildlife, and fantastic outdoor recreation. In no small measure, these qualities can be traced directly to the fact that the region is focused around a core of wildlands with Yellowstone National Park at its heart. *Gateways to Yellowstone* demonstrates that this link is integral to the area's thriving economy.

But this report also finds that the qualities supporting this region's supercharged economic performance and its culture are increasingly at risk precisely because of their magnetic appeal. The economy is thriving, the population is booming, and amidst all that success, great care is required to protect what is most precious about this place.



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