

SNAPSHOT: SOCIAL, CULTURAL AND ECONOMIC CONDITIONS

1 Status

- See separate poster of the contributions of the Forest.
- See map of the economic analysis area and social analysis area.
- Fifteen Tribal entities in six States; Oregon, Idaho, Montana, Wyoming, North Dakota and South Dakota.
- A 2014 population count in the 18 county economic analysis area estimated a population of about 379,000. More than 65 percent of this population live in Gallatin and Yellowstone Counties.
- Population is increasing both in urban and some rural areas.
- There are high poverty communities.
- The Forest's budget was between \$17 and \$19 million since 2013.
- The Forest's timber harvest remains a critical supply chain for the sawmill, log home, and post and pole production companies located within the supply-reach of the Forest.
- The multi-county economic analysis area maintains an average of 4 percent employment in agriculture and 3 percent earnings from agriculture.
- Across the multi-county economic analysis area, forest industries represented just under 1 percent of employment in 1998, and in 2014 dropped to 0.3 percent of total analysis area employment.
- Existing mineral employment, income, and dependent communities will depend on long-term availability of rights and access. Mining activities within the Stillwater Complex are expected to continue over the next 30 to 50 years as influenced by production capacity, ore availability, commodity prices, and societal demand for produced mineral resources.
- The Forest contributes opportunities for recreation related travel and tourism services.

2 Trends

- Overall, population in the multi-county economic analysis area increased 76 percent from 1970 to 2014, from around 200,000 to 379,000. Continued growth is projected.
- Population growth or decrease is highly variable by county.
- Significant expansion in service related industries relative to other industries.
- Significant population growth and expanding service sectors in the two population centers, Bozeman and Billings.
- Increasing per capita income.
- Farm income (including livestock) dropped nearly 36% from 1970 to 2014. Comparatively, non-farm income increased 242% over that same period.
- Livestock related cash receipts across the economic analysis area dropped from a peak of \$1.6 billion in 1973 down to a long term trend hovering around \$600 million. Livestock receipts have rebounded to around \$1.2 billion in the last three years.
- Across Montana, aggregate forest industry production and employment trends have been declining since the 1990's, however a slight reversal of these long-run trends has occurred following the 2008 recession. The reversal in employment levels is primarily due to growth in forestry support roles, as oppose to logging and manufacturing.
- Between 1986 and 2015 Forest Service annual revenue sharing payments to counties within the analysis area increased from \$1.6 million to \$3.2 million. In addition, Forest Service PILT payments provided another \$4.6 million to these same counties in 2015.

3 Information Gaps

- Economic information comes from federal data sources that are mainly reported at the county level. Demographic data is reported at the census county subdivisions level. Federal data sources exclude data where individual firms or businesses can be identified. An information gap exists in describing communities or economies that are smaller than these geographic units.

4 Need to Change Existing Forest Plans

- Respond to the greater importance placed on social and economic needs within the 2012 planning regulations.
- Recognize the significance of sustaining recreation opportunities and other multiple-use benefits (i.e. mining, forest management) as a means to providing employment, as compared to the program provided employment and training described in the current Plans.