Economic Benefits of the Proposed ARC Sporting and Events Complex in Helena, Montana

April 29, 2024

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TABLE OF CONTENTS

EXECUTIVE SUMMARY

This report identifies, and where possible quantifies, the potential economic benefits of the proposed ARC Sporting and Events Complex (ARC) in Helena, Montana. Plans for the complex include a 79,000-square-foot indoor arena, a natatorium with separate sports and recreation/therapy pools, two turf fields, and a fieldhouse capable of accommodating nine pickleball courts, six wrestling mats, three basketball courts, four volleyball courts for tournaments (six for practices), or other sports areas. Economic benefits of the ARC may include:

- Attracting and retaining Helena residents and businesses by improving amenities and quality of life in the area,
- Improving health & fitness, thereby improving quality of life and reducing healthcare costs, and
- Increasing tourism visitation and spending by attracting out-of-town visitors for sports tournaments and other events.

Amenities, including recreational opportunities, are an important contributor to an area's overall quality of life. Lewis and Clark County lacks the sports facilities common in other large Montana cities, which presents an opportunity for a new sports complex to improve the area's relative quality of life. Results of local outreach regarding the facility demonstrate that County leaders and citizens want to address the lack of adequate recreational facilities and desire a facility such as the ARC to enhance quality of life and bring economic development opportunity to Helena.

Improving quality of life with additional recreational amenities such as the ARC is an effective way to retain and attract residents and bolster economic development. Quality of life is an important factor in whether communities grow or decline. Communities with high quality of life also tend to be better at attracting new residents with valuable skillsets. This, in turn, provides the area with economic development as residents contribute to local businesses, start new businesses, and spend a portion of their earnings in the community. For example, for every 30 households that the ARC helps attract and/or retain in the local area, their household spending alone could expand the local economy by approximately 14 jobs and over $736,000 per year in labor income.[1] Additional benefits from attraction/retention of households would likely be felt from additional skilled labor in the regional labor force, and potential more job creation if entrepreneurs were among those attracted/retained in the area.

By providing recreation and fitness opportunities for local residents, the ARC can enhance the health and fitness of local residents. In focus groups and surveys, Lewis and Clark County residents respond that they value access to recreation amenities. The ARC would provide the public with a wide range of opportunities such as lap swimming, basketball, and walking or jogging on the track. In this way, the facility has the potential to improve the health and fitness of Helena's residents, improving quality of life and reducing health care costs.

[1] Note: these estimates do not include the household income and employment in the 30 households – just the income and employment supported by their spending in the local economy.

The ARC would increase tourism and associated economic development by attracting visitors to sports tournaments and spectator events. Out-of-town competitors, their families, friends, and coaches would come to Helena for the tournaments, and spectators would come to watch other events, most of whom would spend money in the local area at hotels, restaurants, retail stores, and other local businesses**. Visitor spending to attend ARC events has the potential to bring more than $26 million per year to the region, which would support 330 jobs and $12.9 million in income annually for Montana workers (most of whom would be in the County). Most of this impact would be felt in Helena and the surrounding area**.

INTRODUCTION

This study evaluates the economic benefits of the proposed ARC Sporting and Events complex in the City of Helena. While a final design for the facility has yet to be determined, the proposed complex evaluated in this study include a 79,000-square-foot indoor arena, a natatorium with separate sports and recreation/therapy pools, two turf fields, and a fieldhouse cap, team rooms, an administration area, and other support spaces. A feasibility study indicated that there is a service gap in the area's existing indoor recreation facilities and estimated the local demand for a multi-sport complex (Ballard King & Associates Ltd, 2017).

To further explore the potential of the ARC Sporting and Events Complex (hereafter referred to as the "ARC"), Helena Regional Sport Association (HRSA) contracted Highland Economics to evaluate the economic benefits of the proposed facility. Specifically, the scope of the analysis is to evaluate the potential magnitude of benefits related to:

- Attracting and retaining residents and businesses by enhancing the area's quality of life,
- Improving the public's health and avoiding health care costs, and
- Attracting tourism spending through hosting sports tournaments and other spectator events.

Where possible, this study provides a quantitative analysis of these benefits, as well as a qualitative analysis of the area's current quality of life and its connection with economic development. The remainder of this report explains how the proposed ARC has the potential to improve quality of life in the area and bolster the local economy by attracting and retaining residents and increasing non-resident spending.

1 Economic Development Benefits: Attract and Retain Businesses and Residents

Economic development is closely intertwined with a community's quality of life. An area with a high quality of life will attract residents, businesses, and tourists, which will further expand its economy. An area that develops its economy is more able to fund public infrastructure that enhances the area's quality of life, such as schools, libraries, public parks, sidewalks, and bike lanes. In this section, we describe the connection between economic development and quality of life, and how a sporting/events complex can play a role in this relationship.

Research has shown that quality of life is an important factor in attracting and retaining residents and developing the local economy. Talented workers are more likely to locate in places that have a good quality of life (Florida, 2000). Retirees are highly mobile and attracted to places with amenities (American Planning Association, 2002). As the following examples illustrate, communities that are successful at bolstering their quality of life also tend to thrive economically. Investments in quality of life can help develop all sectors of an economy, and foster a more diversified, self-reliant, and resilient economy less vulnerable to outside forces by:

- Attracting and retaining young people and retirees,
- Growing high-paying and geographically mobile professional, technical, and businesses service sectors,
- Encouraging business to redevelop and reinvest in the community,
- Growing the tourism and visitor services sectors.

Some communities have succeeded by emphasizing quality of life first, which is then followed by economic development. One such example is Bend, Oregon. The city was historically dependent on the timber industry, which saw significant declines in the 1980's. As the city's economy suffered, they decided to create a plan to diversify their economy. Central priorities of this plan were to improve the area's quality of life and maintain and develop its cultural, historic, and entertainment resources. To accomplish this, the City cleaned up the industrial contamination in its downtown area and repurposed it to house businesses, residences, recreational areas, and an amphitheater. The clean-up allowed visitors and residents to fish and kayak in the Deschutes River in the City's center. When Bend suffered during the Great Recession, the City doubled down on its quality-of-life assets and focused on recruiting and supporting entrepreneurs who have the flexibility to choose where to live, and are attracted to vibrant communities that offer walkability, cultural amenities, and recreation opportunities. The strategy proved a success and helped bolster economic development by making the area a desirable place to live, work, and start a business. The City has since experienced low business vacancy rates in downtown, falling unemployment, and some of the best job growth in the state outside of Portland (U.S. Environmental Protection Agency, 2015).

Another example of a community putting quality of life first is Dubuque, Iowa. After several large employers left in the 1980's, the City's economy began to decline. The unemployment rate rose to 23 percent. As other businesses left, the downtown vacancy rate climbed to 55 percent, and the City's population fell by 7.8 percent between 1980 and 1990. To combat these trends, Dubuque adopted plans to rebuild the city, one of which was to redevelop their riverfront area. Like Bend, the City's riverfront

was unusable to residents and tourists, so transforming it into a walkable, mixed-use neighborhood was seen as a way to increase the area's amenities. In addition to creating a community park, funding was used to help create or restore nearby attractions that improved the quality of life, including museums, a resort, brewery, casino, and a movie theater. Additionally, a community health center was one of 10 projects selected to help revitalize the city.

These efforts, as well as others, helped to turn Dubuque's economy around. The number of workers in the area nearly doubled since 1983, unemployment fell to half the nation's average, and its gross domestic product grew at one of the highest rates in the county. The City has also won a number of awards for its quality of life, including being named one of "100 Best Communities for Young People" by America's Promise Alliance, "Best Small City to Raise a Family" by *Forbes*, and "Most Livable Small City in the United States" by the Conference of Mayors (U.S. Environmental Protection Agency, 2015).

Other cities have used this approach, as well. As part of their economic development strategy, Paducah, Kentucky expanded a public park and created a harbor, boat launch, dock, and marina on the Ohio River. Mount Morris, New York constructed a multi-use trail along the Genesee River. Roanoke, Virginia made outdoor recreation an economic driver, and created greenways, improved biking amenities, placed natural areas under conservation easements to ensure their future existence (U.S. Environmental Protection Agency, 2015). In each case, these communities improved their quality of life as a way to foster economic development.

Areas can also use economic development to improve quality of life, as was demonstrated by Emporia, Kansas. As agricultural prices declined in the late 1970's and early 1980's, many of Emporia's agriculture-related factories and businesses moved out of town. In 1991, local organizations created a program to encourage business growth in the City's downtown. Efforts focused on securing funding, creating favorable finance terms, and easing the burden of bureaucracy. The revitalization efforts led to a decline in downtown vacancy and in 2005 an award of "Great American Main Street." Since that time, the city has used its success to improve the quality of life. Downtown revitalization spurred the formation of a new arts and entertainment district. Pedestrian and bicycle connections were added, and a park for downtown. New mixed-use development has increased the availability of housing and business space (U.S. Environmental Protection Agency, 2015).

A recent study of Midwestern communities by The Brookings Institution provides additional evidence for the importance of quality-of-life for a city's economic development, and indicates that it is even more important than traditional economic development strategies, such as adopting businesses-friendly policies (Austin, Weinstein, Hicks, & Wornell, 2022). The industrial Midwest makes a compelling case study because of the widespread loss of economic sectors that once were the engines of economic growth (manufacturing and industry); a trend that gave the region its nickname "The Rustbelt." The study found that Midwestern communities that invested in quality-of-life amenities (such as recreation opportunities, cultural activities, quality schools, and convenient transportation) tend to show higher employment and population growth than communities that ranked highly on traditional economic competitiveness measures (such as low taxes). The standout example is Traverse City, Michigan, situated on the shores of Lake Michigan. Before the 21st Century, the city relied on lumber, agriculture, manufacturing, and a state hospital for its economy, which suffered when these industries suffered slowdowns, the hospital closed, and its valuable real estate was left polluted. Facing the type of decline that was common in the Rustbelt, Traverse City revived its economy by improving its quality of life and

creating a desirable place to live and visit. State and local funding, as well as investments from local business leaders, allowed the City to clean up its polluted waterfront, revitalize its downtown into an attractive place to live and own a business, and renovate the hospital grounds into a mixed housing and business district within walking distance of downtown (Austin, Weinstein, Hicks, & Wornell, 2022; Grand Traverse County, n.d.; Lybrink, 2024). Today, the city is an attractive place for professionals to settle and for tourists to visit, both of which are drawn to the year-round recreation opportunities, scenery, wineries, and a downtown that offers unique local restaurants, brewpubs, and boutiques, (Austin, Weinstein, Hicks, & Wornell, 2022).

These examples highlight the mutually reinforcing relationship between quality-of-life amenities and economic development. The next section explores recreation, specifically, as a contributor to quality of life, with a focus on contributions in and around Helena.

1.1 Recreation and Quality of Life

Recreation amenities, including sports/events facilities, are an important aspect of an area's quality of life. It is notable in the above examples that the communities seeking to improve their quality of life included recreation amenities in their top priorities. There is a substantial body of literature identifying recreation amenities, particularly outdoor recreation amenities, as important resources to bolster quality of life, retain residents and businesses, and support economic development. For example, one study found that non-metro counties with high outdoor recreation amenities experience migration 2.5 times higher than non-metro counties with scarce recreation amenities. The in-migration has shown consistency over decades and even proved reliable during times of economic downturn (Johnson & Beale, 2002). An abundance of cultural and recreational amenities has been found to lower out-migration rates of young college-educated populations and young married couples (Whisler, Waldorf, Mulligan, & Plane, 2008). While little research to date has been done focusing on the benefits of indoor recreation facilities, as discussed below in **Section 1.2.2**, Helena residents view the proposed ARC facility as an opportunity to enhance their quality of life.

The importance of recreation to quality of life was emphasized in a 2013 report to decision makers in Lewis and Clark County. The report by Beck Consulting was an effort to research, gather, and analyze information on the outdoor recreational opportunities in Helena and the County. While its focus was outdoor recreation, the study's conclusions are likely also relevant to indoor sports facilities. The authors stated that recreation programs and infrastructure "contribute to residents' well-being and quality of life and make the area attractive for businesses to locate in and attract talent." They also acknowledged that "participating in outdoor sports and recreation makes a significant contribution to the general health and quality of life for the active adults and children of the area." The significance was further emphasized in a later passage:

> "Some of the more indirect, yet also important benefits of parks and trails included the ability of the area to attract new businesses—not related to recreation and the ability of existing business to attract strong talent and highly qualified individuals for job vacancies-- because of the quality-of-life connections with recreation opportunities offered by parks and trails." (Beck, Cossitt, & Kohley, 2013)

1.2 Current Quality of Life in Lewis and Clark County and Role of ARC

We begin by exploring the current quality of life in Lewis and Clark County and comparing it to similar areas in Montana; specifically, counties with large population centers similar to Helena. These include the counties of Cascade, Gallatin, Missoula, Silver Bow, and Yellowstone, which include the cities of Great Falls, Bozeman, Missoula, Butte, and Billings, respectively. This comparison is especially relevant because these are not only peer communities but share a close connection through migration. Recent data from the Internal Revenue Service shows that a large portion of the migration into and out of Lewis and Clark County comes from or goes to these other counties (Internal Revenue Service, 2021). In this way, these counties can be seen as competitors for the same residents, and quality-of-life factors could play a role in residents' location decisions. We examine a variety of aspects associated with quality of life in these areas but focus on those aspects that are especially relevant to sports recreation facilities: the availability of similar facilities and health factors impacted by the presence of these facilities.

1.2.1 Indoor Recreational Facilities

The area in and around Helena currently offers a mix of public, private, and non-profit indoor recreational sports facilities. For sports requiring a gymnasium, there are a few facilities that offer a basketball court: Helena Family YMCA, Capital City Health Club, and Crossroads Fitness, with several small gyms in local schools, The Salvation Army, and East Helena City Hall. However, none of these are capable of hosting tournaments. For aquatic sports, there are small indoor lap pools at the YMCA and two private health clubs, and a few outdoor pools, but no indoor public aquatic facilities that could host competitions. Fitness facilities are available primarily at small, private health clubs. In short, the study area currently offers a variety of indoor sports and fitness facilities, but none that offers the combined opportunities of the proposed ARC complex, and space for large tournaments (especially for aquatic sports) is largely unavailable.

Other Montana communities of Helena's approximate size typically offer larger, multi-sport complexes, but these facilities are often provided by colleges. However, other Montana communities also have public facilities. For example, the Billings YMCA has an expansive facility open to the public, which includes basketball courts, two pools, free-weights rooms, a variety of cardio and fitness studios, racquetball courts, an indoor rock climbing wall, and specially designated children's areas. Montana State University (MSU) Billings also houses a large recreation center, which includes a fitness center, 25-yard swimming pool, running track, gymnasium, climbing wall, and racquetball courts. While most of the center is only available to students, staff, and faculty of MSU, as well as their immediate family members, the pool is open to the public and is capable of hosting swim meets.

In Missoula, the University of Montana's Recreation Center offers a fitness center, swimming pool, golf course, climbing wall, outdoor fields, and indoor courts, but similar to Billings, passes are only available to students, staff, faculty, and their guests. The City Life Community Center is open to the public and provides a 34,000-square-foot facility for teens, offering basketball, volleyball, pickle ball, and an indoor paintball facility. Missoula also hosts Peak Health & Wellness. Between its three locations, it offers a competition swimming pool; racquetball, pickleball, handball, basketball, wallyball, and tennis courts; an indoor track; and cardio and weight rooms. In Butte, Montana Tech's HPER Complex offers a basketball court, large fitness center, pool, dance studio, and racquetball courts. Once again, access is restricted to associates of the school. The Butte Family YMCA provides public access to an indoor lap pool and fitness centers. In Bozeman, MSU's Marga Hosaeus Fitness Center previously provided a pool, gym, fitness

center, and outdoor fields. However, the facility closed in 2019 after a roof collapse and has not yet reopened. While the pool and running track were open to the public, the other facilities have restrictions similar to MSU recreational centers in other cities. Bozeman hosts the Gallatin Valley YMCA, which upgraded to a larger facility in August 2017, as well as the Bozeman Swim Center, which offers a 50-meter pool open to public swimming. Great Falls is finishing construction of a new recreation center that will have basketball courts, fitness rooms, a leisure pool, an eight-lane lap pool, a walking/running track, and a daycare center. This facility is scheduled to open in May 2024. Great Falls is also home to the Four Seasons Arena, an indoor arena and exhibition hall with a seating capacity of over 6,300 people. This facility is used primarily for basketball games, rodeos, and conventions.

Helena and Lewis and Clark County lacks the quality of sports facilities found in other large Montana communities. While access to these facilities often has restrictions, they still provide benefits to a significant portion of the local population. Colleges employ large numbers of faculty and staff that are able to use the on-campus recreation centers and are often able to bring family members and guests. Public access is provided to the aquatic centers. Additionally, local schools can often rent out the college's facilities for practices and large events. These opportunities enhance the quality of life in other Montana communities but are currently lacking in Lewis and Clark County. The proposed ***ARC complex could put the County on par with other large Montana cities and could even surpass them in terms of public access to indoor sports facilities.***

The quality and availability of sport facilities was also reviewed in the feasibility and marketing study by Ballard King and Associates of the facility as proposed in 2017 (which offered fewer amenities than the ARC complex currently proposed). Their feasibility study included focus groups and an online survey to capture the public's thoughts on the proposed sports complex. The comments gathered from these efforts provide insights into the community's current quality of life and the potential value of a new sports complex.

Many of the comments focused on the inadequacy of recreational facilities that are currently available. Respondents cite the "need for more gym space," "need for a competitive pool," "a big demand for gym space and a competitive pool," and "a definite need for this type of facility." In sum, the current facilities are not meeting the public's needs. The recreational facilities at the County fairgrounds "are basically booked." The YMCA "has a methane issue" resulting from being built "next to a landfill" and "needs to be replaced." Additionally, the "loss of the Carroll College pool really hurt competitive swimming" since it was the area's "only true competitive pool."

Several comments specifically mentioned how a new facility would enhance quality of life in Helena and surrounding areas. One respondent succinctly stated that the facility "will be a quality-of-life issue." Another identified the facility "as a way to improve the mental and physical health of the area residents." One respondent mentioned the facility's ability to provide opportunities that "have benefits outside of sports," such as attaining "an individual's goals" that "keep a focus in life." Other comments emphasize the quality-of-life benefits to specific populations. One talks about the importance of providing "kids a chance to feel like they have a place to go and be active and fit." The sports complex is seen as a place for kids to "work on positive skills" and a way to "keep them from going towards [a] more negative environment." A healthcare provider stressed the importance of such a facility to middle-aged and senior populations, who "need weight management" and "suffer varying degrees of arthritis." During their self-described frequent interaction with this population, this respondent has found the lack

of “access to this type of facility to be quite limiting to patient progress.” These comments directly acknowledge the potential for an indoor recreational facility to positively impact people’s lives and enhance their quality of life.

While the primary use of the ARC facility would be training, sports tournaments, and spectator events, it would also provide recreational opportunities to the public, who would benefit from regular access to the pool, hard courts, indoor turf fields, and the walk/jog track. The hard courts and indoor turf fields would be available for rental anytime they are not occupied by scheduled events, and the public could benefit from other activities such as enrichment camps, pickleball, swim classes, physical therapy events, nonprofit events such as Girls Thrive, physical education classes for homeschooled children, and birthday parties.

1.2.2 Other Quality-of-Life Indicators

Other factors also play important roles in determining an area’s quality of life, economic development being one example. This factor was raised repeatedly during the public engagement portions of the Ballard King and Associates feasibility and market study. A common theme among the public’s comments was the potential for a sports complex to bring new economic activity to the area. Survey respondents commonly mentioned sports tournaments and “the revenue they would bring into Helena,” predicting the facility would “bring an economic benefit to the area,” which “would be a nice boost to the Helena economy and make us more of a regional destination.” Another respondent states that “indoor basketball courts and more tournaments would generate money in the Helena area.” One exclaims: “Events pour dollars into our community to all our businesses!” Respondents also brought up how other communities have benefited from this kind of economic activity: “Missoula is busy almost every weekend in the winter with tournaments. The hotels, shopping, and restaurants benefit as well as the kids getting a chance to compete.” These comments recognize the potential for a sports complex to improve the area’s quality of life by bringing in new economic activity. The current proposed ARC would also host spectator events (such as concerts and other shows), further expanding the economic development potential of the facility.

To examine how Lewis and Clark County compares to similar counties in Montana, we use six indicators of an area’s quality of life: Income, education, unemployment, disability, life expectancy, and obesity. We display the results in **Table 1-1** for the selected Montana communities as a comparison of the general quality of life between the areas. Values are color-coded according to how they compare to Lewis and Clark County (red being worse, green being better).

Table 1-1: General Measures of Quality of Life in Montana Communities

Metric	Lewis & Clark	Cascade	Gallatin	Missoula	Silver Bow	Yellowstone
Median income [1]	$74,590	$63,587	$86,475	$69,276	$58,349	$74,935
College education [1]	27%	18%	34%	28%	19%	24%
Unemployment [2]	3.5%	4.1%	2.5%	4.3%	4.4%	3.6%
Disability [3]	1.7%	2.6%	0.5%	1.8%	3.1%	1.9%
Life expectancy [4]	78.4	76.2	82.0	78.9	74.8	76.3
Obesity [4]	29%	35%	19%	26%	30%	32%

1/ Source: (U.S. Census Bureau, 2022)[2]
2/ Source: (U.S. Bureau of Labor Statistics, 2024)
3/ Sources: (U.S. Social Security Administration, 2022) and (U.S. Census Bureau, 2022)
4/ Source: (County Health Rankings, 2023 (2020 data))

Lewis and Clark benefits from the second highest median household incomes among its peers and some of the lowest rates of unemployment. In college education, it is only bested by Missoula (Silver Bow has about the same level given the margin of error in the survey), which undoubtedly benefits from the large state college it hosts. In measures of health, the study area has better health outcomes than Cascade and Yellowstone counties, while trailing behind Gallatin County. ***This analysis indicates that Lewis and Clark County benefits from a generally high quality of life. This could amplify the ability of a sports/events facility to attract and retain residents, a potential we will explore in later sections.***

1.3 Economic Development Benefit of Resident Attraction/Retention

Previous sections have explained how a multi-sports complex has the potential to improve quality of life and thereby attract and retain residents. Here, we illustrate how the attraction and retention of residents affects the level of economic activity in Lewis and Clark County.

Certain segments of the population are more mobile than others, and so are strongly influenced by the quality of life in an area. These demographic groups include:

- Retirees whose income is no longer tied to employment,
- Young professionals who are choosing where to start their careers and have the skills to be marketable in many geographic areas,
- Married professionals who are choosing where to start a family and also possess marketable skills that allow geographic movement,
- Entrepreneurs and mobile professionals who have a choice of where they would like to live and start businesses.

Attracting these population segments can bring substantial economic benefits to an area, as they bring added local spending and taxes, skilled labor, and new jobs and businesses. In this analysis, due to ease of quantification, we focus solely on the benefits of additional household spending in the local economy that is the result of retaining and attracting such residents in the Helena community (recognizing that

[2] All values were adjusted for inflation to 2023 dollars using the Implicit Price Deflator for Gross Domestic Product (U.S. Bureau of Economic Analysis, 2024).

the direct economic benefits of a high-skilled labor force are likely far greater – though more difficult to measure).

To assess the economic impact of retaining and attracting such households, we focus on three of these household types: married professionals with children, retiree couples, and single professionals. For each of these household types, we estimate how household spending by 10 such households supports economic activity in the local economy and increases the number of jobs and local area income.

We use U.S. Census data to estimate the median household income over the last 12 months for each of these three household types in Lewis and Clark County.[3] We then analyzed the total economic impact on Montana's economy of spending by each household type, using an economic model (using IMPLAN data and software) of the state economy. While the results show the state-level impacts, the vast majority of the economic impacts would accrue to Lewis and Clark County.

Table 1-2 summarizes the results. Due to their high income, household spending by married professional families with children have the highest economic impact. Retaining/attracting 10 such households would support approximately six jobs and $314,000 in local income annually. Retiree couples and single professionals have similar incomes and therefore a similar economic impact; attracting or retaining 10 of these households supports approximately four jobs and approximately $198,000 to $224,000 in income annually in the county.

Table 1-2: Annual Economic Impact of Retaining/Attracting Residents

Household Type	Median Household Income	Economic Impact per 10 Households	
		Jobs	Labor Income
Married professionals with children	$95,127	6.0	$314,000
Retiree couples	$58,378	3.7	$198,000
Single professionals	$63,934	4.0	$224,000

Sources: (U.S. Census Bureau, 2022), IMPLAN model for Montana, and Highland Economics analysis. All values have been adjusted for inflation from 2022 dollars to 2023 dollars using the Implicit Price Deflator for Gross Domestic Product (U.S. Bureau of Economic Analysis, 2024).

Assuming 10 of each type of these households, or a total of 30 households, were to remain in/be attracted to Helena in part or in whole because of the facility, then area household income could rise by a total of $2.17 million. This income, in turn, would support approximately 14 jobs and $736,000 in labor income in the State economy, most of it in the local Helena region.

[3] The corresponding Census categories were "married-couple families," "heads of household 65+ years old," and "25-year-olds and older with a Bachelor's degree."

2 HEALTH BENEFITS OF A SPORTS COMPLEX

Health is a critical component of quality of life. Facilities that promote and provide opportunities to be physically active can make a significant difference in the health and fitness of the community. We begin by comparing the health statistics of Lewis and Clark County to those of the other benchmark communities in Montana, with a focus on the aspects of health connected with physical activity. These metrics include:

- Rates of obesity
- Diabetes
- Heart disease,
- Physical activity outside of employment
- Access to exercise opportunities

We present health statistics at the county level as this is the smallest unit that is studied uniformly and for which data are available. We believe that county level data are a good measure of health conditions for the service area of the proposed facility, as the service area of the proposed sports/events complex extends beyond Helena to include a majority of the county's residents.

The most recent health statistics for Lewis and Clark County are provided in **Table 2-1**. For quick and easy comparison, the statistics of other areas are color-coded according to how they relate to Lewis and Clark County, with green cells signifying more favorable health outcomes, red signifying worse health outcomes, and yellow cells signifying values similar to those found in Lewis and Clark County.

Table 2-1: Comparative Health Metrics

Health Metric	Lewis & Clark	Cascade	Gallatin	Missoula	Silver Bow	Yellowstone	Montana
No physical activity outside of work [1]	17%	21%	13%	14%	22%	20%	18%
Obesity rate [1]	29%	35%	19%	26%	30%	32%	29%
Diabetes rate [1]	8%	9%	7%	7%	9%	8%	8%
Coronary heart disease mortality rate [2]	141	148	119	200	271	182	177
Access to exercise opportunities [1]	69%	77%	83%	91%	78%	82%	73%

Note: Percent values represent the proportion of adults in the total population. Non-percent values represent the number of adults per 100,000 population.
1/ Source: (County Health Rankings, 2023 (2020 data))
2/ Source: (Centers for Disease Control, 2020)

As the above table shows, residents of Lewis and Clark County generally experience better health outcomes than the counties of Cascade, Silver Bow, and Yellowstone, as well as the state as whole. This is true for physical inactivity, heart disease mortality, and obesity (although the county and state share the same obesity rate). However, health outcomes in Gallatin and Missoula counties indicate that Lewis and Clark County still has substantial room for improvement in its health outcomes. For most metrics, Lewis and Clark County needs to reduce prevalence of these ailments by 10 to 35 percent before it

reaches the levels seen in Gallatin and Missoula. ***A particularly relevant metric to this study appears in the last row of the table, which shows that Lewis and Clark County lags behind each of the other counties, as well as the state, in adequate access to exercise opportunities. The proposed ARC facility has the potential to help close this gap.***

The U.S. Census estimated the 2020 population of Lewis and Clark County to be just under 71,000, with 78 percent over the age of 18 (about 56,000 people) (U.S. Census Bureau, 2020). According to the statistics in the table above, around 4,300 of these adults have diabetes, over 9,500 are inactive, and over 16,000 are obese. If Lewis and Clark County experienced the health standards of Gallatin County, over 400 fewer adults would have diabetes, 2,200 more adults would be active, and 5,500 adults would no longer be obese. This illustrates the potential for Lewis and Clark County to improve its activity-related health outcomes.

The proposed ARC in Helena could help facilitate improvement in health outcomes by increasing the availability of facilities and opportunities that encourage residents to be active. While ARC will primarily provide a space for sports practices and tournaments, it will also provide the public with opportunities to exercise in the pools, use the hard courts, indoor turf fields, walk/jog on the track, and rent the facilities for a variety of other physically active events. These increased opportunities for activity have the potential to benefit residents of Lewis and Clark County. It is also notable that Cascade and Silver Bow counties, both of which tend to experience worse health outcomes than Lewis and Clark, lie within an hour's drive of Helena. Increased exercise opportunities (such as those offered by the ARC complex) have the potential to improve the quality of life of their populations, as well.

Research has identified a strong connection between the availability and proximity of sports recreation facilities and improved health outcomes, especially for children. In one study, it was found that children who live close to recreational programs are less likely to experience increases in Body Mass Index (BMI), a standard measure of being overweight (Wolch, et al., 2011). A 2006 literature review indicated that children's participation in physical activity is positively associated with publicly provided recreational infrastructure (Davison & Lawson, 2006). Another study that same year found that larger and closer parks and recreation areas were associated with greater physical activity in young children (Roemmich, et al., 2006). A more recent study found a link between children's weight and the presence of a recreation area, showing that the presence of recreation facilities decreases the likelihood of a child being obese (Fan & Jin, 2016). A sports facility that encourages children to be physically active could be especially helpful in Helena, where childhood obesity is a concern (Beck, Cossitt, & Kohley, 2013).

The connection between facility availability and physical activity exists not just with children but also with adults. A study of rural Midwestern adults found that the presence and proximity of recreation centers significantly increased the odds of engaging in regular physical activity (Deshpande, Baker, Lovegreen, & Brownson, 2005). A study of adults across the U.S. found that access to an indoor gym was significantly associated with meeting the recommended level of physical activity (Brownson, Baker, Housemann, Brennan, & Bacak, 2001). Older adults benefit from the presence of a nearby recreation facility, as well. A study of adults 50 years and older found that swimming pools were one of several facilities significantly related to higher physical activity (Chad, et al., 2005). A study of adults over 60 years found that access to a recreation center was associated with greater physical activity (Booth, Owen, Bauman, Clavisi, & Leslie, 2000).

It should be noted that the positive association between facility availability and health outcomes, while common, may not be ubiquitous. Some studies have found that the relationship is not statistically significant (Foster, Hillsdon, & Thorogood, 2004; King, et al., 2003). Others have showed no association between the proximity of a fitness facility and physical activity, which may imply that proximity may not matter as much as access (Hoehner, Ramirez, Elliott, Handy, & Brownson, 2005). The ARC facility would increase access to sports practices and tournaments, swimming opportunities to the public, hard courts, and the walking/jogging track, which could represent an important new source of physical activity for some people. To the extent that it does, the ARC facility could generate some of the health benefits outlined in this section.

A Helena sports facility that encourages more residents to be physically active and lose weight has the potential to reduce health care costs. Studies have consistently shown that obese persons have greater health problems and higher health care expenditures than normal weight persons (Carlson, Fulton, Pratt, Yang, & Adams, 2015). One study found particular cost savings associated with ambulatory care and prescription drug expenditures (Bell, Zimmerman, Arterburn, & Maciejewski, 2011). Another study found that the annual health care costs of the obese tend to be over 40 percent higher than people of normal weight (Finkelstein, Trogdon, Cohen, & Dietz, 2009).

Inactivity itself carries significant health care costs. A recent study measured how much more inactive and insufficiently active adults paid for health care versus adults that were sufficiently active. The researchers found that inactive adults paid roughly $1,700 to $1,900 per year more in health care costs than sufficiently active adults, and insufficiently active adults paid $750 to $940 dollars more annually (Carlson, Fulton, Pratt, Yang, & Adams, 2015).[4] As an illustrative example, if a new sports complex in Helena resulted in 10 inactive adults and 10 insufficiently active adults becoming sufficiently active, the total healthcare savings would total roughly $25,000 per year. This effect would be especially profound for children whose use of the facility may help them develop life-long habits that help them to live an active lifestyle throughout adulthood. One such child living to the age of 80 could see healthcare savings of $120,000 to $132,000 over their lifetime.[5]

Local employers could also see a benefit from improved health outcomes. Many employers are unaware of the indirect costs caused by poor health, which include absenteeism, disability, and presenteeism (on-the-job productivity losses) (Centers for Desease Control and Prevention, 2016). However, research suggests that these costs are significant. The costs of obesity at a firm of 1,000 employees has been estimated to be $403,000 per year (Finkelstein & Brown, 2006).[6] A study of more than 10,000 U.S. employees across multiple professions found that the average annual cost of an overweight employee was almost $300 higher than a normal weight employee and over $900 higher more for an obese employee (Goetzel, et al., 2010).[7] If a new sports complex in Helena could encourage

[4] Values have been adjusted from 2012 dollars to 2023 dollars using the Implicit Price Deflator for Gross Domestic Product (U.S. Bureau of Economic Analysis, 2024).

[5] Assumes a child of 10 years grows up to avoid 70 years of inactivity saving $1,700 to $1,900 per year in health care costs.

[6] Values have been adjusted for inflation from 2006 dollars to 2023 dollars using the Implicit Price Deflator for Gross Domestic Product (U.S. Bureau of Economic Analysis, 2024).

[7] Values have been adjusted for inflation from 2006 dollars to 2023 dollars using the Implicit Price Deflator for Gross Domestic Product (U.S. Bureau of Economic Analysis, 2024)..

local workers to exercise and improve their health, local employers would benefit from greater workplace attendance and higher worker productivity.

3 ECONOMIC IMPACTS OF TOURISM

A new sports/events complex has the potential to boost the area's economy by hosting sports and spectator events that attract spending from out-of-town visitors. In this section, we estimate the size of these economic impacts to the state of Montana. In brief, using data from HRSA, our analysis projected the number of overnight visitors that will attend events at the ARC, estimated their tourism spending, and estimated how that spending would ripple out through the economy. Even under generally conservative assumptions, the results indicate that visitor spending associated with hosting events could support 330 jobs and $12.9 million annually in labor income in Montana, most of it in the Helena region.

3.1 TOTAL OVERNIGHT VISITATION

To be conservative in economic development estimates, this analysis only includes the economic activity supported by event participants (including coaching and support staff) and spectators who reside outside the County, stay overnight, and do not stay with family or friends. These are the visitors that are most likely to be supporting economic activity in the county that would otherwise not occur without the ARC. Visitors who attend an event as a day trip, and those who lodge with family or friends, are not included in the estimates. Because these visitors may also spend money in the County that would not otherwise have been spent (e.g. buying food, fuel, retail items, etc.), we expect that our estimates provide a conservative picture of the economic impact of the ARC.

Based on data from HRSA, we estimate visitation for 45 events that are likely to be hosted in the ARC (see **Table A-1**). In addition to these events, the facility is likely to bring in out-of-County visitors for other events, including:

- Air National Guard training events,
- Summer camps,
- Other sports competitions and practices, and
- Other spectator events (including monster truck shows, bull riding, and circuses).

These events will also increase spending in Helena. For these reasons, we consider our estimates to be very conservative, with the true economic impact of non-resident visitors being larger. **Table 3-1** provides a summary of event visitor estimates. In total, the ARC is expected to bring in more than 97,000 visitors from outside the County each year who will spend over 200,000 visitor-days in the County.

To project the total number of visitors per year, we relied on HRSA to project the types of events the ARC complex would host; the number of event-days per year; the number of participants, coaches, and staff (from both in and outside Lewis & Clark County); and the number of spectators for each event (from both in and outside Lewis & Clark County) (Landes, 2024). These estimates are shown in detail in **Table A-1** of Appendix A and summarized in **Table 3-1** below.

To analyze the projected spending of visitors to these events, we begin by classifying each event as one of three categories. "Participant" events are events that primarily draw participant visitors, such as sport tournaments. Participant events are further divided into youth and adult events. The third type of event is the "Spectator" event, which primarily draws spectator visitors (such as a concert). The combined assumptions are summarized in **Table 3-1.**

Table 3-1: Estimated Overnight Visitors for ARC Events

Event Type	Events per year	Event-days per year	Participants from outside Lewis & Clark County	Coaches & staff from outside Lewis & Clark County	Spectators from outside Lewis & Clark County	Total visitors from outside Lewis & Clark County	Visitor-days per year
Participant - Youth	27	67	14,552	1,977	27,655	44,184	112,290
Participant - Adult	8	16	572	66	10,542	11,180	16,330
Spectator	10	17	665	330	41,300	42,295	71,535
Total	**45**	**100**	**15,789**	**2,373**	**79,497**	**97,659**	**200,155**

Sources: (Landes, 2024) and Highland Economics analysis.

3.2 Total Visitor Spending

Visitors attending participant events are likely to have different spending patterns than those attending spectator events. Additionally, visitors attending adult participant events are likely to have different spending patterns than visitors attending youth participant events. For that reason, we use distinct spending profiles for each event type. The spending profiles used in this analysis are based on three studies by the University of Montana's Institute for Tourism and Recreation Research (**Table 3-2**).

Table 3-2: Source Studies for Spending Profiles

Event Type	Source Study for Spending Profile	Citation
Participant - Youth	2015 Montana State High School Rodeo Finals in Kalispell, Montana	Schultz (2015)
Participant - Adult	2016 Spartan Race in Bigfork, Montana	Schultz (2016b)
Spectator	2016 Big Sky Film Festival in Missoula, Montana	Schultz (2016a)

Each study surveyed out-of-town visitors who attended the event and gathered information on their spending on various categories, such lodging, restaurants, and gasoline.[8] The respondents also provided their travel group size and the number of nights they stayed in the area. From this data, we were able to derive the average spending per person per day for an out-of-town visitor at each of the events. **Table 3-3** displays these estimates, and, when combined with the visitor-days outlined in **Table 3-1** above, the estimates provide the projected total spending that would result from the events.

[8] The studies surveys also included spending categories such as camping, auto rentals, and local transportation. These were omitted from this analysis because they would likely only apply to a small number of tournament visitors. However, the omissions further support the conservative nature of our estimates.

Table 3-3: Per-Person and Total Spending at ARC Events by Spending Category

Spending Category	Spending per Person per Day			Total Spending per Year			
	Participant - Youth	Participant - Adult	Spectator	Participant - Youth	Participant - Adult	Spectator	Total
Lodging	$49	$39	$41	$5,502,000	$637,000	$2,933,000	$9,072,000
Restaurants	$24	$18	$26	$2,695,000	$294,000	$1,860,000	$4,849,000
Groceries	$15	$9	$7	$1,684,000	$147,000	$501,000	$2,332,000
Gas	$31	$15	$19	$3,481,000	$245,000	$1,359,000	$5,085,000
Retail Goods	$14	$8	$8	$1,572,000	$131,000	$572,000	$2,275,000
Entertainment	$16	$12	$13	$1,797,000	$196,000	$930,000	$2,923,000
Total	**$149**	**$101**	**$114**	**$16,731,000**	**$1,650,000**	**$8,155,000**	**$26,536,000**

1/ Estimates were derived from Schultz (2015), Schultz (2016a), and Schultz (2016b). Mean expenditures per group were converted into average spending per person per day using the average group size and average number of nights stayed in the area. Estimates were adjusted for inflation to 2023 dollars using the Consumer Price Index for All Urban Consumers.

As the table above shows, the source studies indicated that per-person per-day spending is highest for youth participant events and lowest for adult sporting events. The total daily per-person spending values (roughly $100 to $149) seem reasonable in the context of other studies and observations by local experts, whose estimates range from $90 - $160 per person per day for similar events (Barkey & Morrill, 2016; Crossroads Consulting Services, 2015; Pentilla, 2016; Sayler, 2012).[9]

Table 3-3 shows how youth participant events are expected to generate the highest total amount of visitor spending (63 percent of the projected annual total). This is due primarily to the fact that youth participant events are expected to comprise 67 percent of all event-days included in this analysis (see **Table 3-1**). The number of adult participant and spectator event-days are expected to be roughly equal, but spectator events are expected to generate nearly five times as much visitor spending due to the larger number of attendees. Spectator events are expected to bring in the highest tourism spending to the region per event-day: $480,000. This is followed by youth participant events, which are expected to attract tourism spending of $250,000 per event-day. Adult participant events are expected to attract tourism spending of $103,000 per event, which is lower due to fewer visitors per event and less spending per person.

In total, the ARC complex is expected to attract over 97,000 overnight visits to the Helena region that would result in over $26 million in visitor spending each year. Hotels receive the highest proportion of total visitor spending ($9.1 million), followed by gas ($5.1 million) and restaurants ($4.8 million) (**Table 3-4**).

3.3 Economic Contribution

To calculate the total economic contribution to the county, we use an IMPLAN model of the Montana state economy, which translates how direct tourism spending supports jobs and income in the Montana economy (including in tourism sectors and other, supporting sectors). **Table 3-4** outlines how spending

[9] Figures have been adjusted for inflation to 2023 dollars using the Implicit Price Deflator for Gross Domestic Product (U.S. Bureau of Economic Analysis, 2024).

totals in the table above are assigned to IMPLAN sectors. For restaurant spending, we assume that half of total spending goes to limited-service restaurants while the other half goes to full-service restaurants.

Table 3-4: Visitor Spending Impacts Industry Sectors

Spending Category	IMPLAN Sector	Visitor Spending
Lodging	499 Hotels and motels, including casino hotels	$9,072,000
Restaurants	501 Full-service restaurants	$2,424,500
Restaurants	502 Limited-service restaurants	$2,424,500
Groceries	400 Retail - Food and beverage stores	$2,332,000
Gas	402 Retail - Gasoline stores	$5,085,000
Retail Goods	405 Retail - General merchandise stores	$2,275,000
Entertainment	496 Other amusement and recreation industries	$2,923,000
Total	All sectors	$26,536,000

Source: Highland Economics analysis

When a visitor spends money at a business in Lewis and Clark County, that business benefits directly. Through ripple effects, other businesses also benefit from that spending. Businesses selling more goods or services tend to buy more goods and services from other businesses. For example, a restaurant that receives more patrons will have to buy more food. If that food is locally sourced, the local food suppliers benefit from the indirect effect of the spending, increasing its total economic effect in the local area. Furthermore, household income of restaurant owners and employees will go up, part of which will be spent at local establishments. This is called the induced effect. Together, the direct, indirect, and induced effects comprise the total economic impact of spending. Using an IMPLAN model, we translate the direct impacts listed in **Table 3-4** into total economic impacts shown in **Table 3-5**.

In total, we project that the $26 million in overnight visitor spending will support 330 jobs (full and part-time) and $12.9 million in labor income for Montana workers and proprietors. While these impacts are estimated at the state-level, most of the impact will be felt in and around Helena. **Table 3-5** displays the breakdown of total economic impacts according to the direct, indirect, and induced effects.

Table 3-5: Total Economic Impact of Overnight Visitors by Effect

Impact Type	Employment (Full & Part-Time Jobs)	Labor Income (2024 $)
Direct Effect	240	$8,400,000
Indirect Effect	40	$2,000,000
Induced Effect	50	$2,500,000
Total Effect	330	$12,900,000

Source: Highland Economics analysis and IMPLAN model for Montana
Note: Numbers may not sum due to rounding.

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APPENDIX A

Table A-1: Estimated Visitation by Event

Event	Event type	Event-days per year	Participants and staff per event	Event participants and staff from outside L&C County	Spectators per event	Event spectators from outside L&C County	Visitors from outside L&C County per event	Total visitor days per year
Sleeping Giant Invitational (Wrestling)	Participant - Youth	3	2,400	2,190	0	0	2,190	6,570
Helltown Throwdown (Wrestling)	Participant - Youth	3	2400	2,190	3,000	2,400	4,590	13,770
3 on 3 Basketball Tourney #1	Participant - Youth	2	660	488	2,400	1,800	2,288	4,576
3 on 3 Basketball Tourney #2	Participant - Youth	2	660	488	2,400	1,800	2,288	4,576
Harlem Globetrotters	Spectator	1	N/A	25	1,800	0	25	25
Concert #1	Spectator	1	N/A	25	12,500	5,000	5,025	5,025
Concert #2	Spectator	1	N/A	25	12,500	5,000	5,025	5,025
Concert #3	Spectator	1	N/A	25	12,500	5,000	5,025	5,025
Concert #4	Spectator	1	N/A	25	12,500	5,000	5,025	5,025
Concert #5	Spectator	1	N/A	25	12,500	5,000	5,025	5,025
Concert #6	Spectator	1	N/A	25	12,500	5,000	5,025	5,025
5 on 5 Basketball Tourney #1	Participant - Youth	2	1,260	928	2,400	1,800	2,728	5,456
5 on 5 Basketball Tourney #2	Participant - Youth	2	1,260	928	2,400	1,800	2,728	5,456
5 on 5 Basketball Tourney #3	Participant - Youth	2	1,260	928	2,400	1,800	2,728	5,456
High School State Finals Tournament	Participant - Youth	3	576	480	5,000	3,500	3,980	11,940
High School Regional/Division Tournament	Participant - Youth	3	176	132	2,000	264	396	1,188
Lacrosse Tourney (Finals)	Participant - Youth	2	336	294	864	756	1,050	2,100
Lacrosse Tourney (Finals)	Participant - Adult	5	400	319	1,056	840	1,159	5,795
Stampede and Fair (concerts)	Spectator	4	N/A	N/A	12,500	5,000	5,000	20,000
Last Chance Music Festival	Spectator	3	N/A	N/A	12,000	5,000	5,000	15,000
Carroll College Home B-Ball Game - Men's	Participant - Adult	1	44	22	6,000	2,500	2,522	2,522
Carroll College Home B-Ball Game - Men's	Participant - Adult	1	44	22	6,000	2,500	2,522	2,522
Carroll College Home B-Ball Game - Men's	Participant - Adult	1	44	22	6,000	2,500	2,522	2,522

Event	Event type	Event-days per year	Participants and staff per event	Event participants and staff from outside L&C County	Spectators per event	Event spectators from outside L&C County	Visitors from outside L&C County per event	Total visitor days per year
Carroll College Home B-Ball Game - Women's	Participant - Adult	1	48	23	5,500	2,000	2,023	2,023
Special Olympics Basketball	Spectator	3	950	820	1,500	1,300	2,120	6,360
HYSA Soccer #1	Participant - Youth	2	500	375	800	600	975	1,950
HYSA Soccer #2	Participant - Youth	2	500	375	800	600	975	1,950
Capital City Volleyball Challenge	Participant - Youth	3	2,040	1,680	4,000	2,800	4,480	13,440
Montana AAU Volleyball Championships	Participant - Youth	3	2,040	1,680	4,000	2,800	4,480	13,440
Swish Basketball Tournament	Participant - Youth	2	1,260	928	2,400	1,800	2,728	5,456
Archery State Indoors Tourney	Participant - Youth	2	60	48	250	175	223	446
Archery National Indoor Tourney	Participant - Youth	3	265	245	400	250	495	1,485
USA Swim State Meet	Participant - Youth	3	420	255	600	400	655	1,965
USA Swim State Jrs. B&C	Participant - Youth	3	366	230	500	360	590	1,770
USA - USMS Dual Sanctioned Meet	Participant - Youth	3	445	280	600	350	630	1,890
Masters Swim Meet #1	Participant - Adult	2	150	100	200	100	200	400
Masters Swim Meet #2	Participant - Adult	2	100	75	150	75	150	300
USA/USMS Swim Clinics 1 and 2	Participant - Youth	4	104	60	60	40	100	400
Dual Meet #1	Participant - Youth	1	96	48	250	50	98	98
Dual Meet #2	Participant - Youth	1	96	48	250	50	98	98
Invite #1	Participant - Youth	2	416	362	500	350	712	1,424
Invite #2	Participant - Youth	2	416	362	500	350	712	1,424
State Meet	Participant - Youth	3	496	452	900	650	1,102	3,306
Adult Flag Football	Participant - Adult	3	176	55	0	27	82	246
High School Flag Football	Participant - Youth	4	176	55	0	110	165	660
Total of all included events		**100**	**22,640**	**18,162**	**167,380**	**79,497**	**97,659**	**200,155**

Source for visitor and events estimates: Landes (2024)
Source for visitor-day estimates: Highland Economics' analysis