



BIG MONEY

Big Game Hunting & Outfitting Economic Contributions
— Wyoming —



— BIG GAME HUNTING IS BIG BUSINESS IN WYOMING —

Our state is the 10th largest in area and the least populated in the country, which translates into an abundance of huntable land. With tremendous opportunities to hunt for some of the most incredible big game species in the world including elk, antelope, mule deer, moose, bighorn sheep, white-tailed deer and mountain goats, it is quickly obvious why Wyoming is one of the most desirable hunting destinations in all of North America. It is also obvious why hunting is so critical to the state's economy.

Nonresidents spend 85 percent of all big game guide and outfitter fees in Wyoming in 2015.

Compared to resident hunters, non-resident big game hunters who use guides and outfitters spend 178% more annually.

Nonresident hunters who use a guide or outfitter spend 6.2 times more than unguided visitors.

— THE STUDY —

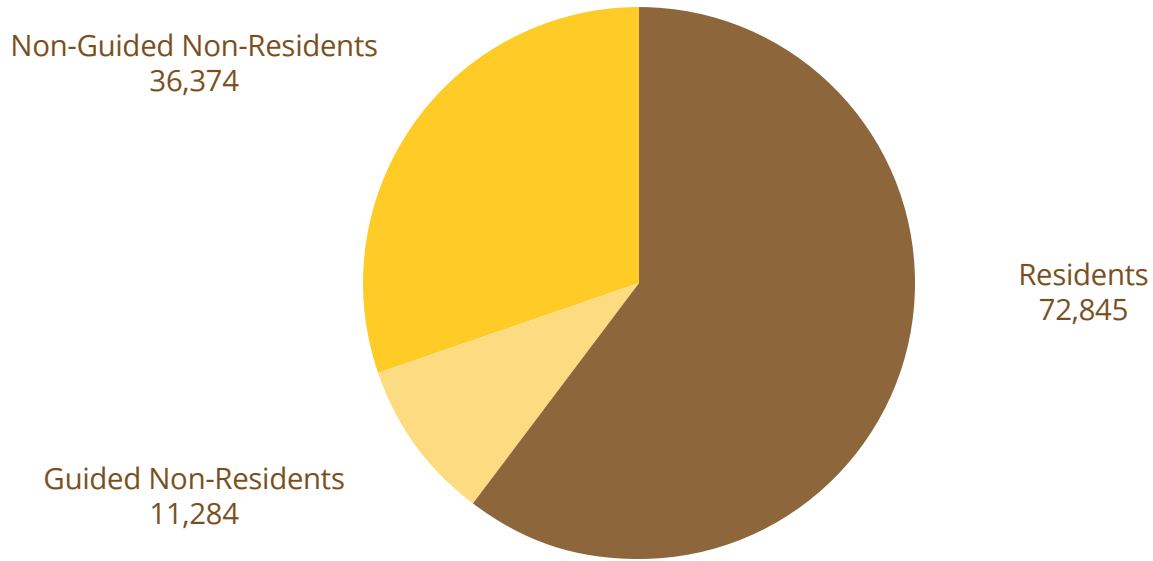
In "Economic Contributions of Big Game Hunting in Wyoming," a study conducted in 2015 by Southwick Associates, one of the nation's leading outdoor research and economics firms, the importance of big game hunting to the state's economy became clear. This original study was commissioned to determine the economic contributions generated by big game hunters in 2015 in Wyoming using license sales records and custom surveys of both resident and nonresident hunters. It provided results for all hunters combined, as well as resident hunters, guided nonresident hunters and unguided nonresident hunters separately.

Researchers examined not only the direct expenditures made by hunters to purchase licenses, buy gear, pay for outfitters, and other trip-related expenses such as airline tickets, gas, hotels, food, and restaurants, but also the state-wide multiplier effects of those expenses. These include jobs supported from their expenditures, income and tax revenues generated, and other pass-along economic benefits as people and businesses who directly benefit from hunter dollars in turn spend those dollars on products and services themselves. This current effort updates the original work to reflect the 2020 hunting season by adjusting for inflation and changes in the number of hunters. From 2015 to 2020, Wyoming had just a small (0.6%) increase in resident hunters, but a 9.2% increase in the number non-resident hunters.

Photo courtesy of Ryan Sparrow



— Number of 2020 Wyoming Licensed Big Game Hunters —



▶ The typical resident hunter who responded to the survey hunted nearly 13 days for big game in 2015. The typical nonresident hunter spent 9 days total in Wyoming and hunted 5.1 of those days.

— ECONOMIC CONTRIBUTIONS OF BIG GAME HUNTING IN WYOMING —

	Resident Hunters	Nonresident Hunters			Total (Res. & Nonres.)
		Guided	Non-Guided	Total	
Retail Sales	\$147,683,250	\$63,665,578	\$38,576,601	\$102,163,282	\$249,846,531
Economic Contribution	\$193,352,908	\$90,948,622	\$54,914,148	\$145,862,770	\$339,215,678
Salaries & Wages	\$53,152,839	\$24,572,241	\$17,998,238	\$42,570,480	\$95,723,319
Jobs	1,637	1,073	787	1,860	3,497
State & Local Taxes	\$14,581,812	\$14,087,133	\$3,197,792	\$17,284,925	\$31,866,737

— HUNTING OVERVIEW —

Wyoming hosted more than 120,000 big game hunters in 2020, of which 60 percent were residents and 40 percent were nonresidents. Those hunters, that same year, spent \$250 million on gear, travel, guides and other goods and services in Wyoming, which in turn generated economic benefits that extended to all state residents. These same dollars went on to support 3,500 jobs – more than many Fortune 500 companies; \$95.7 million in salaries, wages and small business income – or \$166 per state resident of any age; plus \$31.9 million in state and local tax revenues. Looking at the bigger picture, big game hunting spending created a multiplier effect, or rounds of spending, of \$339.2 million. In other words, if big game hunters took all their dollars out of state, the Wyoming economy would shrink by \$339.2 million.

For a state like Wyoming, rural in nature and short on big industry, hunting is big industry and the numbers above testify to this fact. It is critical to all residents for hunting to generate as much money as possible for the state. This is an important distinction to make to stakeholders involved in or benefiting from Wyoming's hunting future. But is all hunting or are all hunters equal when it comes to generating economic benefits for the state and its residents?

While they are all beneficial, they absolutely are not all equal the study reveals. In fact, despite accounting for nearly one out of every three hunters in the state, nonresident hunters, particularly those hiring outfitters, generate a disproportionate amount of the economic benefits.

— RESIDENTS VS. NONRESIDENTS —

Reducing the number of nonresident tags could exponentially negatively impact tax revenues, sales revenues and jobs in the state. Here's a look at why by the numbers:

- 60 percent of all big game hunters are residents and they generate 59 percent of big game-related monies spent in the state.
- With only 40 percent of hunters being nonresidents and accounting for only 41 percent of all big game hunting retail sales (many will buy gear and equipment in their home state prior to arriving in Wyoming), they still generate 43 percent of the total economic activity, 53 percent of the jobs and 54 percent of tax receipts.
- Nonresidents accounted for 65 percent of all travel dollars spent by the state's big game hunters. These are dollars spent on lodging, food (both restaurants and grocery stores), gas stations, guides and outfitters and other companies supporting hunters' travel needs.
- Including equipment, nonresidents spend 41 percent of all dollars associated with big game hunting in Wyoming, and 85 percent of all big game guide and outfitter fees.
- Per hunter in-state retail sales breakdown to \$2,027 per resident hunter, \$5,642 per guided nonresident hunter and \$1,061 per unguided nonresident hunter.
- Guided hunters also had the highest expenditures per hunter when it came to providing for total economic contribution, salaries and wages, jobs and state and local taxes.

Real estate purchases also factor greatly into comparisons between different types of big game hunters. In 2015 – the latest year for such data - the typical Wyoming resident who bought real estate for the main purpose of hunting spent \$125,260 on their land purchase. However, the typical nonresident—drawn by Wyoming's wide open spaces, abundant land and opportunities for big game adventure—spent a whopping \$542,146. Added up, 2015 resident and nonresident big game hunters spent \$138.7 million to own their very own piece of hunting paradise. Adjusted for hunting and real estate trends, this could amount to total real estate spending of \$163.8 million in 2020, with an average resident purchase price of \$146,000 and \$633,000 for non-resident hunters.

— SPENDING BY WYOMING’S BIG GAME HUNTERS —

	Resident Hunters	Nonresident Hunters		
		Guided /	Non-Guided /	Total
Commercial transportation	\$4,971,188	\$5,887,191	\$5,390,287	\$11,218,369
Other transportation costs	\$13,937,909	\$2,242,533	\$7,575,140	\$9,818,275
Groceries	\$9,706,765	\$1,112,426	\$4,522,824	\$5,635,640
Restaurants and bars	\$4,194,402	\$1,495,796	\$4,204,440	\$5,698,575
Lodging	\$2,492,947	\$2,457,594	\$5,365,823	\$7,808,272
Equipment rental	\$565,030	\$329,866	\$973,777	\$1,303,373
Fees paid to landowners	\$494,568	\$953,549	\$3,124,042	\$4,077,794
Heating/cooking fuel, ice, etc.	\$3,144,466	\$241,904	\$1,188,663	\$1,430,283
Other items	\$2,793,689	\$619,518	\$1,577,411	\$2,193,307
Guides/Outfitters	\$7,673,026	\$45,174,629	\$0	\$45,174,629
Total Trip Spending:	\$49,973,990	\$60,515,006	\$33,922,407	\$94,358,516
Ammunition	\$5,336,674	\$60,172	\$186,804	\$246,976
Firearms & bows	\$8,118,920	\$41,095	\$260,139	\$301,234
Optics	\$10,454,522	\$114,442	\$194,380	\$308,822
Binoculars, cameras	\$3,008,770	\$63,632	\$54,690	\$118,322
Clothing	\$4,557,365	\$229,135	\$432,509	\$661,643
Other hunting gear	\$3,576,512	\$74,096	\$277,973	\$352,069
ATV, trailer, accessories	\$14,531,499	\$3,802	\$78,674	\$82,476
Boat, motor, trailer, accessories	\$471,023	\$7,334	\$10,205	\$17,538
Travel trailer, motor home, etc.	\$9,372,168	\$0	\$2,169	\$2,169
Motor vehicle	\$22,047,595	\$0	\$16,236	\$16,236
Maps	\$866,952	\$37,080	\$249,725	\$286,805
Repair of hunting equipment	\$1,530,933	\$21,763	\$165,745	\$187,508
Taxidermy	\$4,266,308	\$1,021,240	\$612,993	\$1,634,233
Meat processing and/or shipping	\$4,242,670	\$1,352,627	\$1,514,638	\$2,867,264
Camping equipment	\$1,869,080	\$34,582	\$178,280	\$212,862
Hunting dogs	\$1,322,331	\$1,893	\$0	\$1,893
Books, magazines	\$469,411	\$9,028	\$46,935	\$55,963
Other hunting-related equipment	\$1,666,527	\$78,654	\$372,099	\$450,753
Total Equipment Spending:	\$97,709,260	\$3,150,572	\$4,654,194	\$7,804,766
Total Spending:	\$147,683,250	\$63,665,578	\$38,576,601	\$102,163,282

— GUIDED VS. UNGUIDED —

When it comes to nonresident big game hunters in Wyoming, there are distinct differences, particularly when broken down among guided hunters versus unguided or do-it-yourself hunters. Guided, nonresident big game hunters in Wyoming spent \$4,003 on average for guides and outfitters in 2020. When added to their total spending on other hunting-related goods and services, these hunters spent over five times more per hunter than unguided nonresident hunters.

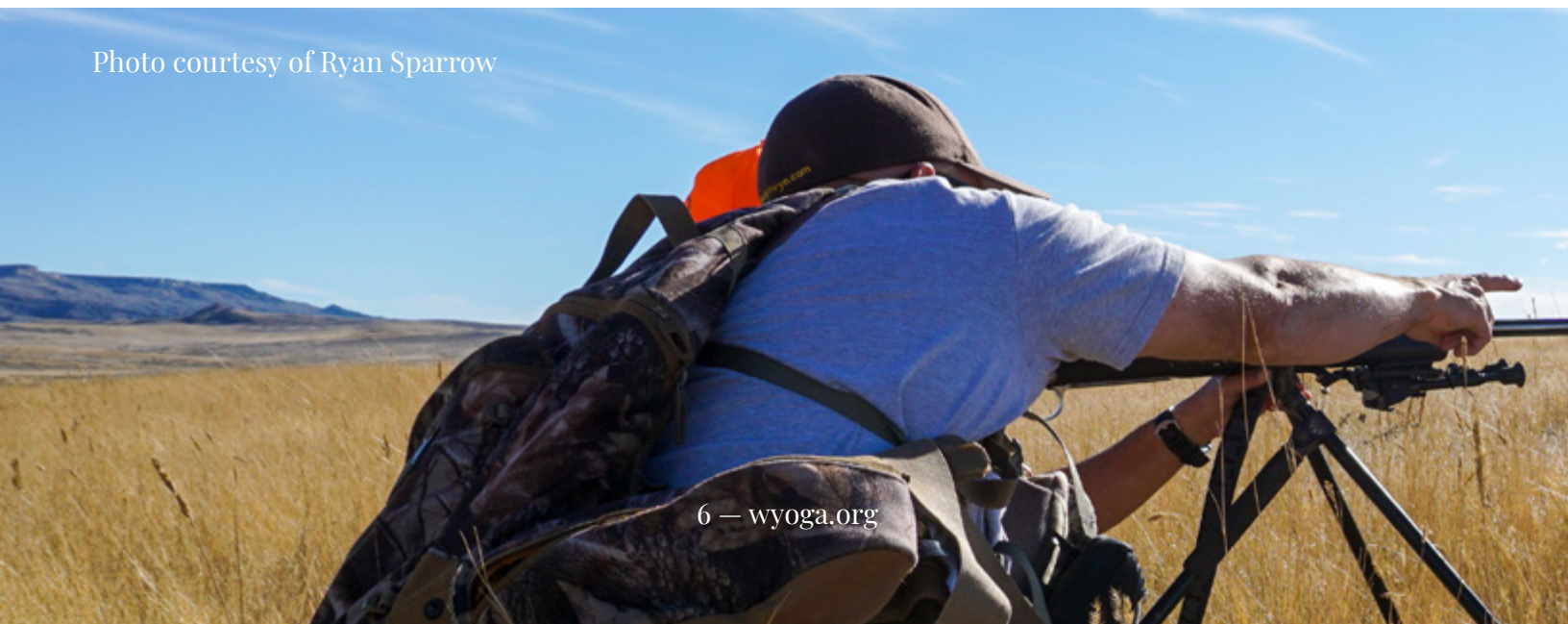
When it comes to the decision of whether to hunt on their own or not, the majority of visiting hunters prefer the do-it-yourself approach with only 24 percent using guides and outfitters. However, this smaller group accounted for 64 percent of all travel-related dollars. Guided hunters also account for 85 percent of all big game guide and outfitter fees. Outfitters and guides were paid a total of \$52.8 million by resident and nonresident hunters in 2020—again, 85 percent of that by nonresidents.

Monies spent for guides and outfitters go to support jobs, both directly hired by the outfitters and for services ancillary to hunting activities such as lodging, food and taxidermy. Funds to outfitters and guides also provide much-needed revenue streams for landowners who provide access to their lands for the purpose of hunting. Revenues dedicated to compensate landowners for access to their properties came in to the tune of \$11 million annually.

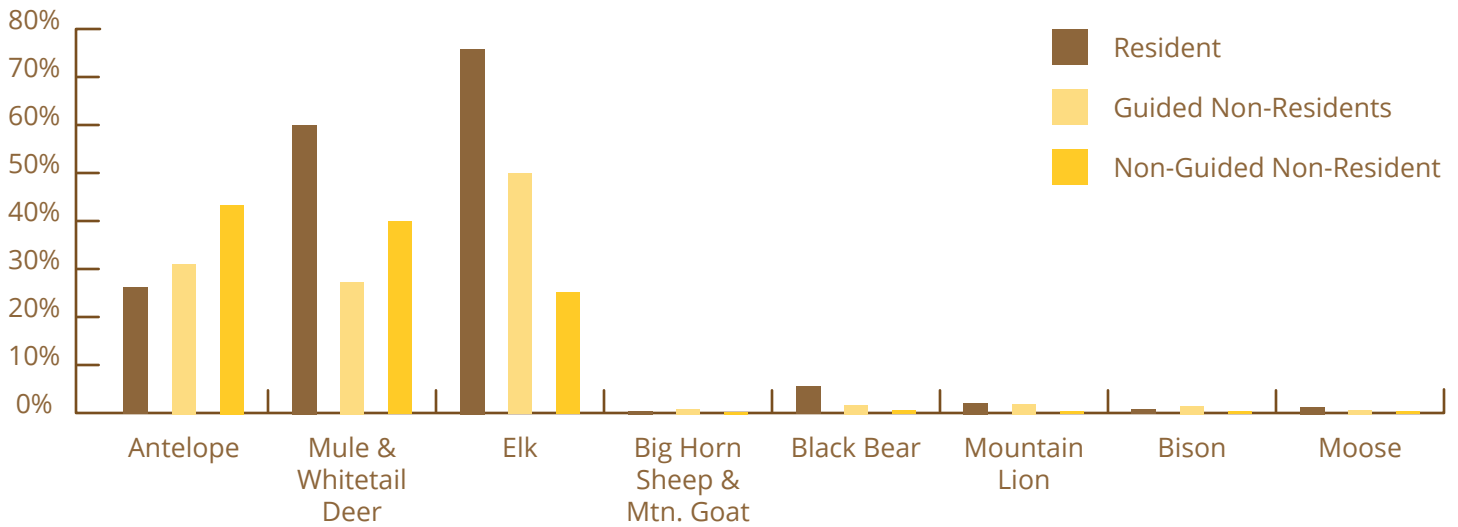
— CONTRIBUTIONS PER BIG GAME HUNTER —

	Resident Hunters	Nonresident Hunters		
		Guided /	Non-Guided /	Total
# of Hunters	72,845	11,284	36,374	47,658
Retail Sales	\$2,027.36	\$5,641.86	\$1,060.57	\$2,143.68
Economic Contribution	\$2,654.31	\$8,059.61	\$1,509.73	\$3,060.61
Salaries & Wages	\$729.67	\$2,177.52	\$494.82	\$893.25
Jobs	0.02	0.10	0.02	0.04
State & Local Taxes	\$200.18	\$1,248.36	\$87.92	\$362.69

Photo courtesy of Ryan Sparrow



— PREFERRED BIG GAME SPECIES —



Elk is the most targeted species by resident and guided nonresident hunters.

Antelope and mule deer are the most targeted species by unguided nonresident hunters.

— FINAL TAKE —

Big game hunting in Wyoming is more than a hobby or casual pastime. It is big business that results in the expenditure of \$250 million annually. While helping to support an entire industry built around outfitting and guiding, the revenues generated transcend hunt-centric business and benefit all state residents through funds spent on lodging, food, gas, other travel-related expenses, retail goods and services, land access and state and local taxes. Decisions that affect the allocation of future permits and licenses must carefully consider how big game hunting's far-reaching economic benefits are created to ensure optimal economic benefit for all Wyoming residents.





SOUTHWICK ASSOCIATES

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