Economic Benefits of the Proposed Multi-Sport Complex in Helena, Montana

May 4, 2017

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HRSA

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EXECUTIVE SUMMARY

This report identifies, and where possible quantifies, the potential economic benefits of a potential multi-sport complex in Helena, Montana. Plans for the facility include a gymnasium with basketball courts, a competition-sized pool capable of hosting swim meets, a community activity pool, an elevated walk/jogging track, a fieldhouse for sports such as soccer and lacrosse, as well as other spaces. The economic benefits of the multi-sport complex may include:

- Attracting and retaining residents and businesses by improving amenities and quality of life in the area,
- Improving health outcomes and saving users money on health care costs, and
- Increasing tourism in the Helena area and thus increasing spending by attracting out-of-town visitors for athletic tournaments.

Quality of life is an important factor that contributes to the growth and decline of communities. Case studies from around the United States demonstrate that improving quality of life is an effective and sustainable way to retain residents, increase tourism, and bolster economic development. Communities with a high quality of life are more effective at retaining existing residents and attracting new residents who have very valuable skillsets. This, in turn, provides an area with economic development as residents contribute to local businesses, start new businesses, and spend a portion of their earnings in the community.

Amenities, including recreational opportunities, are an important contributor to an area's overall quality of life. Information gathered through focus groups and surveys in the Helena area highlight the value of recreation amenities to residents. City and County leaders and residents voiced concern over the lack of adequate athletic facilities in the area and have a strong desire to see new facilities constructed. Survey respondents commonly recognized that a facility would enhance quality of life and economic development in the area. Statistics show that while the Helena area has a good quality of life, there is room for improvement, especially regarding health outcomes related to lack of exercise. In this regard, a new sports facility has the potential to improve public health and save users money on health care costs.

Furthermore, one of the economic advantages of a new sports facility would be the increased spending by out of area visitors attending sports tournaments. Athletes, their families, friends, and coaches would come to Helena for these tournaments, and spend money at local hotels, restaurants, retail stores, and other local businesses. Such a facility has the potential to provide substantial economic benefits to the area.

Where possible, we quantify the economic benefits that are likely to result from a new multi-sport complex. Among this study's most significant findings are that:

- 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.
- For every 30 households that the new sports facility helps attract and retain in the local area (representing approximately two to five percent of the projected annual membership), their household spending alone could expand the local economy by approximately 15 jobs and over

$572,000 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 potentially direct job creation if entrepreneurs were among those attracted/retained in the area.

- Visitor spending during sports tournaments has the potential to bring in $1.36 million per year to the Helena area, which would support approximately 20 jobs and $487,000 in income annually for local workers. This level of labor income exceeds the annual budget shortfall for the proposed facility identified in the facility feasibility study of roughly $103,000 to $335,000 (Ballard King & Associates Ltd, 2017). Thus, at the community level, community financial support for the facility to make up for operating losses would likely be more than recouped in total increased community income.
- If the facility encourages physical activity by individuals who are currently physically inactive, then the facility could provide such users up to $1,500 per year in health care savings, and can potentially save local employers over $600 per employee per year (in increased productivity and reduced absenteeism) for such employees that use the facility.
- Retirees, whose income is frequently independent of local labor markets, tend to use quality of life when making decisions about whether to stay in or relocate to communities. For every 30 retiree households that chose to relocate to the Helena area, household spending could expand the local economy by over 12 jobs and $504,000 per year in labor income.

[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.

1 INTRODUCTION

This study evaluates the economic benefits of a proposed multi-sport complex in the Helena area. While a final design for the facility has yet to be determined, proposed plans include a gymnasium with basketball courts, a competition-sized pool capable of hosting swim meets, a community activity pool, an elevated walk/jogging track, a fieldhouse for sports such as soccer and lacrosse, locker rooms, and an administration area with other support spaces. A recent feasibility study indicated that there is a service gap in the area's existing indoor recreation facilities and estimated what the local demand for a multi-sport complex would be (Ballard King & Associates Ltd, 2017).

To further explore the potential of the sports complex, Helena Regional Sport Association contracted with Highland Economics to evaluate the economic benefits of the new facility. Rather than examining the more commonly-recognized economic impacts of such a facility, such as the economic impact of construction and operations expenditures, this research focuses on the indirect economic benefits, which include:

- Enhancing economic development through attraction and retention of 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.

This study includes 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 multi-sport complex has the potential to improve quality of life in the area, improve health outcomes, save users money on health care, and bolster the local economy by attracting and retaining residents and increasing non-resident spending.

2 Economic Development Benefits: Attract and Retain Businesses and Residents

Economic development is critical to a community's quality of life, and vice versa. An area with a high quality of life will attract residents, businesses, and tourists, which will further expand its economy. A community that fully develops its economy is generally more able to fund public infrastructure that enhances the area's quality of life, such as schools, streets, libraries, public parks, sidewalks, and bike lanes. In this section, we describe the connection between economic development and quality of life, and how a sports complex could 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 high 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;
- Adding high-paying and geographically-mobile professional, technical, and service sector jobs;
- Encouraging businesses to redevelop and reinvest in the community; and
- Growing the tourism and visitor services sectors.

Some communities have succeeded by investing in quality-of-life improvements, which are then followed by economic development gains. 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 and residences. 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. Similar to 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 as way 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).

These examples demonstrate 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 the study area.

2.1 Recreation and Quality of Life

Recreation amenities, including sports facilities, are an important contributor to and component 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 gains 2.5 times that of non-metro counties with scarce recreation amenities. This 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 2.2**, Helena area residents view the proposed sports 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 the Helena area. The report by Beck Consulting was an effort to research, gather, and analyze information on the outdoor recreational opportunities in Helena and Lewis and Clark 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)

2.2 Current Quality of Life in Lewis and Clark County and Role of HRSA

We begin by exploring the current quality of life in Lewis and Clark County and comparing it to similar areas in Montana; specifically, counties that also contain large population centers, as Lewis and Clark does. 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, 2016). 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 this 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.

2.2.1 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, Carroll College, Capital High School, Helena High School, and the Helena Family YMCA provide the most substantial facilities, with a number of small gyms located in local elementary schools, The Salvation Army, and East Helena City Hall. 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. The most comprehensive facility is the YMCA, but the need for a significant upgrade and inability to expand limit the opportunities it can provide (Ballard King & Associates Ltd, 2017). 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 multi-sport complex, or the space for large athletic tournaments.

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 recently-remodeled 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. Also in Billings, the Sports Plex offers a weight-lifting center and indoor field.

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 has two Peak Health & Wellness locations that collectively offer 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 but, once again, access is restricted to those affiliated with the school. For the public there are aquatic and gym facilities at the Butte YMCA. In Bozeman, MSU's Marga Hosaeus Fitness Center has a pool, gym, fitness center, and outdoor fields. While the pool and running track are open to the public, the other facilities have restrictions similar to MSU recreational centers in other cities. Bozeman facilities also include the Gallatin Valley YMCA, which opened in 2017 but contains just 20,000 square feet of fitness and locker room space, and focuses primarily on youth programing. There is an ongoing effort to raise money for a gym and swimming pool adjacent to the existing Gallatin Valley YMCA (Stevenson, 2017). Great Falls does not appear to have any multi-sport complexes.

In summary, Helena and Lewis and Clark County lacks the quality of sports facilities found in other large Montana communities (with the exception of Great Falls). While access to many of these facilities located on college campuses is somewhat restricted, they still provide benefits to a significant portion of the local population, particularly as public access is generally available at the aquatic centers. Additionally, 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. Furthermore, 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 the Helena area. The proposed sports complex could put the Helena region 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 in the Helena area was also reviewed in a recently completed feasibility and marketing study by Ballard King and Associates of the proposed facility. Their feasibility study included focus groups and an online survey to gather the public's input on the proposed

sports complex. The comments gathered from these efforts provided insights into the community's current quality of life and the potential value of a new sports complex.

Many of the comments from the focus groups and the survey 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 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."

A number of 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 emphasized the quality of life benefits to specific populations. One talked 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 found the lack of "access to this type of facility to be quite limiting to patient progress." These comments directly acknowledge the potential for a new indoor athletic/recreational facility to positively impact people's health and enhance their quality of life.

2.2.2 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.

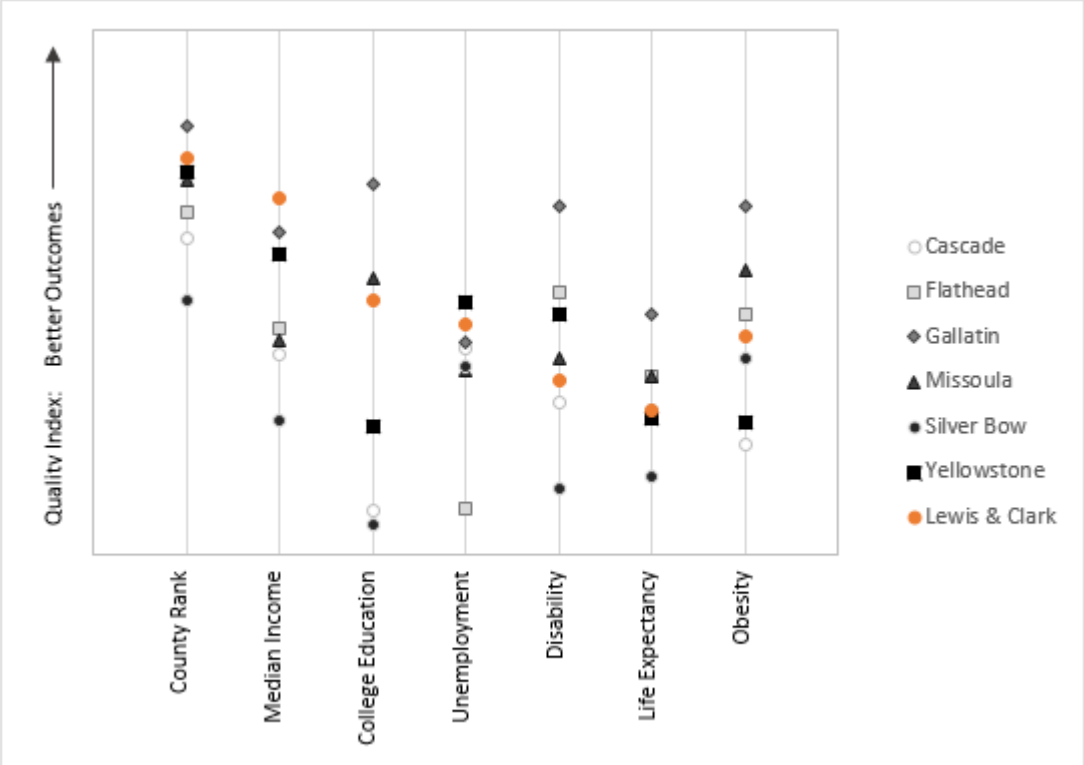
In 2014, The New York Times sought to compare the general quality of life in counties across the U.S. in their article "Where are the hardest places to live in the U.S.?" To rank the counties, the article used six indicators of an area's quality of life: Income, education, unemployment, disability, life expectancy, and obesity. We display the results in **Table 2-1** and **Figure 2-1** for selected Montana communities as a comparison of the general quality of life between the areas.

Table 2-1: General Measures of Quality of Life in Montana Communities

Metric	Lewis & Clark	Cascade	Flathead	Gallatin	Missoula	Silver Bow	Yellowstone
U.S. Rank [1]	294	858	681	54	451	1304	395
Median income	$54,535	$43,817	$45,545	$52,211	$44,653	$39,211	$50,608
College education	38%	23%	29%	45%	39%	22%	29%
Unemployment	4.9%	5.4%	9.0%	5.3%	5.9%	5.8%	4.4%
Disability	1.2%	1.3%	0.8%	0.4%	1.1%	1.7%	0.9%
Life expectancy	78.30	78.3	79.1	80.5	79.1	76.8	78.1
Obesity	30%	35%	29%	24%	27%	31%	34%

Source: (Flippen, 2014)
1/ Rank out of 3,135 U.S. counties.

Figure 2-1: Comparison of Quality-of-Life Metrics in Montana Communities



According to article's indices, Lewis and Clark County has a good quality of life compared to other U.S. counties, ranking in the top 10 percent. It also out-ranks the other Montana counties with the exception of Gallatin, which ranked in the top two percent nationally. Lewis and Clark benefits from the highest median income among its peers and some of the lowest rates of unemployment. In college education, it is only bested by Gallatin and Missoula, both of which undoubtedly benefit from the large state colleges they each host. In measures of health, the study area generally has better health outcomes than Cascade, Silver Bow, and Yellowstone counties, while trailing behind Gallatin, Flathead, and Missoula counties. This analysis indicates that Lewis and Clark County benefits from a generally high quality of life. This could amplify the ability of a sports facility to attract and retain residents, a potential we will explore in later sections.

2.3 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 the Helena area.

Certain segments of the United States' population are more mobile than others, and thus 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, and
- Entrepreneurs and mobile professionals who have a choice of where they would like to live and start businesses.

Attracting these people can bring substantial economic benefits to an area, as by increasing 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 would result from retaining and attracting these mobile populations in the Helena area. It is important to recognize that 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 County economy and increases the number of jobs and local area income.

U.S. Census data was used to estimate the median household income over the last 12 months for each of these three household types in the County.[2] The total economic impact on the economy of the County was analyzed by looking at the spending of each household type. This was done using an economic model (using IMPLAN data and software) of the county economy. **Table 2-2** summarizes the

[2] 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."

results. Due to their high income, household spending by married professional families with children have the highest economic impact on the economy. Retaining/attracting 10 such households would support approximately seven jobs and $256,000 in local income on an annual basis. Retiree couples and single professionals have similar incomes and therefore typically have a similar economic impact. Attracting or retaining 10 of these types of households would support approximately four jobs and approximately $150,000 to $170,000 in annual income.

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

Household Type	Median Household Income	Economic Impact per 10 Households	
		Jobs	Labor Income
Married professionals with children	$85,977	7	$256,000
Retiree couples	$55,363	4	$168,000
Single professionals	$48,704	4	$149,000

Sources: (U.S. Census Bureau, 2015), IMPLAN model for Lewis and Clark County, and Highland Economics analysis. All values have been adjusted for inflation from 2015 dollars to 2017 dollars using the Consumer Price Index.

Assuming 10 of each type of these households were to remain in or be attracted to the Helena are in part or in whole because of the facility, then area household income could be retained or increase by a total of $1.9 million. This income, when added to the overall County economy, would support approximately 15 jobs and over $572,000 in labor income. While it is uncertain whether or not the new sports complex would, in fact, help retain 30 such families, it is notable that the households in this example would only represent a small fraction of the facility's projected annual membership. The feasibility analysis by Ballard King estimated that the facility would receive an estimated 1,576 annual members (Ballard King & Associates Ltd, 2017). The households in the above-mentioned analysis would represent only two to five percent of the facility's annual membership, depending on how many people in the household held memberships or passes. While it is not known how many households the facility would attract or retain, this analysis provides a reasonable illustration of the potential economic impact of the facility due to retention/attraction of residents.

3 HEALTH BENEFITS OF A SPORTS COMPLEX

This section summarizes how availability of a sports complex may enhance public health in Lewis and Clark County, and how such an improvement, in turn, benefits quality of life, reduces health care costs, and enhances employee productivity.

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

- Rates of obesity and overweight,
- Diabetes,
- Heart disease, and
- Physical activity outside of employment.

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 complex extends beyond Helena and comprises a majority of the county's residents.

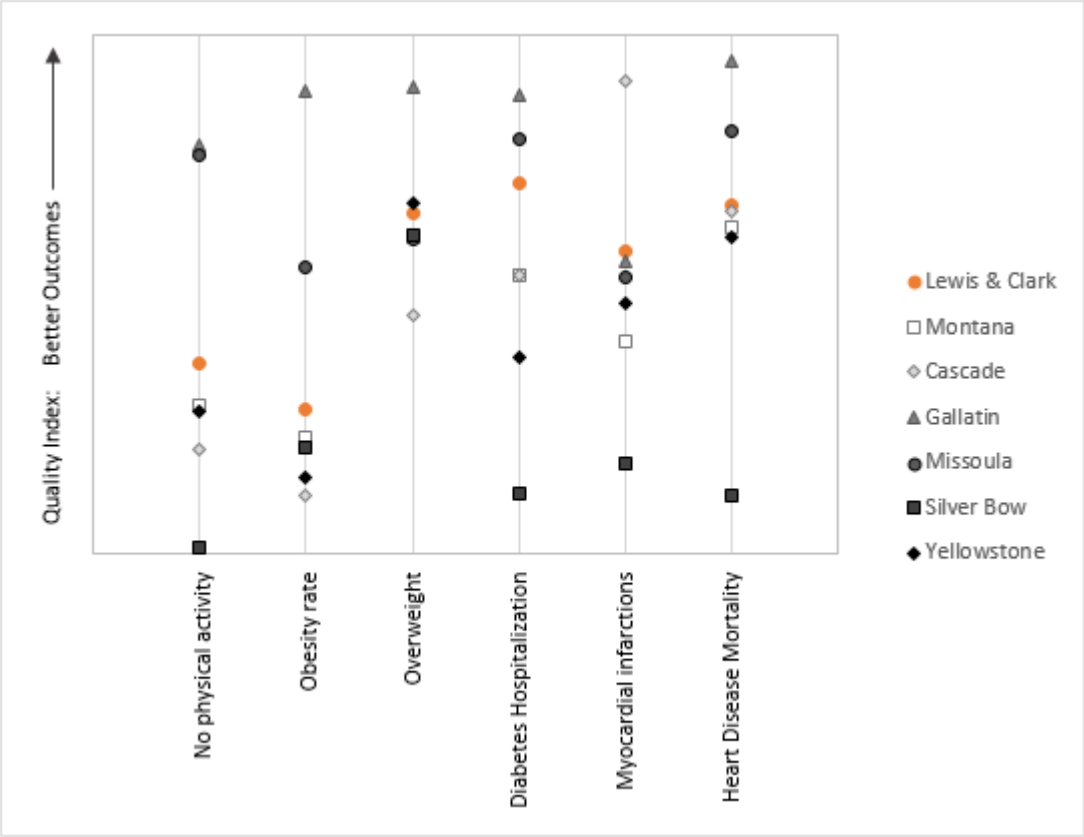
The most recent health statistics for Lewis and Clark County are provided in **Table 3-1,** as compiled by the Montana Department of Public Health and Human Services (DPHHS) in its Community Health Assessments. For easier comparison, **Figure 3-1** ranks the health metrics of each area, with more favorable values being placed near the top of the chart.

Table 3-1: Comparative Health Metrics from Montana DPHSS

Health Metric	Lewis & Clark	Cascade	Gallatin	Missoula	Silver Bow	Yellowstone	Montana
Rate of no physical activity outside work	19.5%	22.0%	13.2%	13.5%	24.8%	20.9%	20.7%
Obesity rate	20.8%	23.3%	11.6%	16.7%	21.9%	22.8%	21.6%
Overweight rate	36.9%	40.8%	32.0%	37.9%	37.7%	36.5%	37.8%
Diabetes hospitalization rate	94.3	115.6	73.7	84.3	165.9	134.3	115.4
Heart attack hospitalization rate	133.2	147.3	107.0	135.0	137.2	166.0	141.3
Heart disease mortality rate	184.4	188.2	96.3	139.1	363.5	204.6	198.0

Source: (Montana Department of Public Health and Human Services, 2011). Percent values represent the proportion of adults in the total population. Non-percent values represent the number of adults per 100,000 population.

Figure 3-2: Comparison of Health Metrics from Montana DPHSS



As the above figure shows, Lewis and Clark County often experiences better health outcomes than the counties of Cascade, Silver Bow and Yellowstone, as well as the state as whole. This is true for obesity, heart attack hospitalization, heart disease mortality, and physical inactivity, and often true for overweight. However, health outcomes in Gallatin and Missoula counties demonstrate that Lewis and Clark still has substantial room for improvement in its health outcomes. For most metrics, the County needs to reduce prevalence of these ailments by 20 to 30 percent before it reaches the health levels seen in Gallatin and Missoula, and for some conditions such as obesity and heart disease mortality, by almost half.

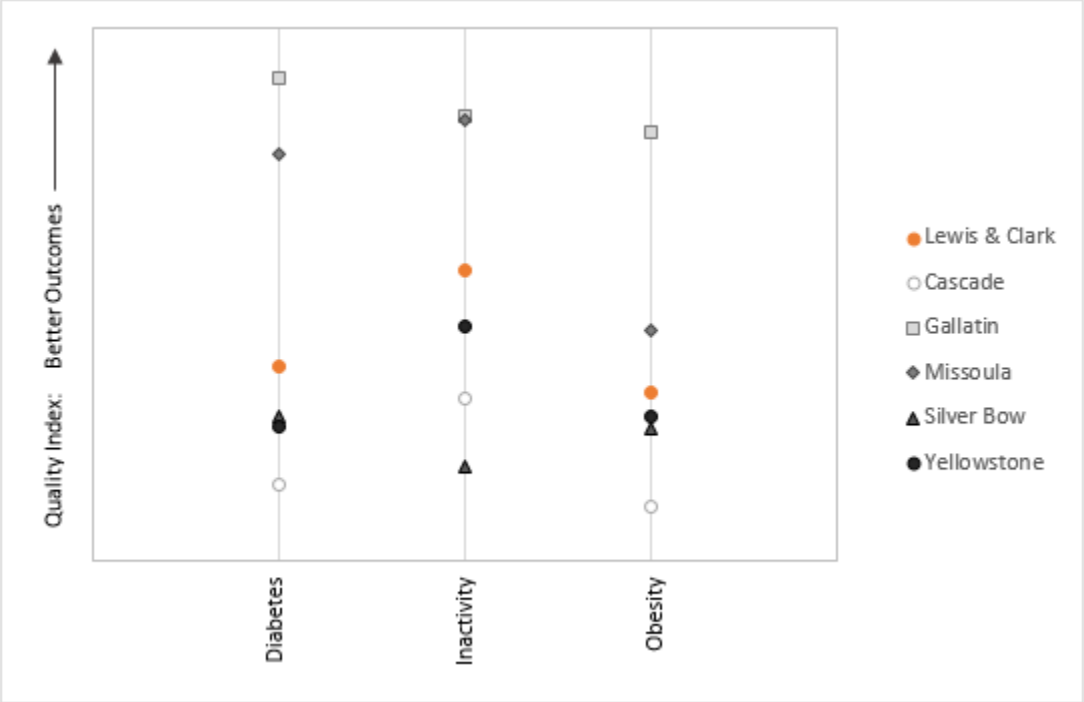
Table 3-3: Comparative Health Metrics from the CDC

Health Metric	Lewis & Clark	Cascade	Gallatin	Missoula	Silver Bow	Yellowstone
Diabetes	7.7%	9.1%	4.3%	5.2%	8.3%	8.4%
Inactivity	20.2%	24.5%	15.0%	15.1%	26.8%	22.1%
Obesity	24.3%	28.2%	15.5%	22.2%	25.5%	25.1%

Source: (Centers for Disease Control and Prevention, 2016). Figures represent the age-adjusted percentage of the adult population.

More recent health statistics from the Centers for Disease Control and Prevention (CDC) show much the same picture, displayed in **Table 3-2** above and **Figure 3-2** below. In the included metrics, study area residents fare slightly better than Cascade, Silver Bow, and Yellowstone, but do not experience the activity-related health outcomes seen by Gallatin and Missoula.

Figure 3-4: Comparison of Health Metrics from the CDC



The U.S. Census estimates the current population of Lewis and Clark County to be just over 65,000, with 78 percent over the age of 18 (about 51,000 people) (U.S. Census Bureau, 2015). According to the statistics in the table above, almost 4,000 of these adults have diabetes, over 10,000 are inactive, and over 12,000 are obese. If Lewis and Clark County experienced the health standards of Gallatin County, 1,700 fewer residents would have diabetes, 2,600 more people would be active, and 4,400 would no longer be obese. This illustrates the potential for Lewis and Clark County to improve its activity-related health outcomes. A new multi-sport complex in Helena could help facilitate this improvement by increasing the availability of facilities and offering programing that encourages residents to be active.

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), which is 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 more accessible 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 currently 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 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).

A Helena sports facility that encourages more residents to be physically active and lose weight has the potential to save users money on health care. 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 individuals 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 money inactive and insufficiently active adults paid for health care versus adults that were sufficiently active.[3] The researchers found that inactive adults paid roughly $1,400 to $1,500 per year more in health care costs than sufficiently active adults, and insufficiently active adults paid $600 to $750 dollars more annually (Carlson, Fulton, Pratt, Yang, & Adams, 2015).[4] As an illustrative example, if a new sports/recreation complex in Helena resulted in 10 currently inactive adults and 10 insufficiently active adults becoming sufficiently active (representing roughly one percent of the facility's projected annual membership), their total healthcare savings would total over $20,000 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 $86,000 to $97,000 over their lifetime.

[3] The study defined sufficiently active as 150 minutes per week of moderate-intensity equivalent physical activity. Inactive is defined as no moderate-intensity equivalent physical activity that lasted at least 10 minutes. Insufficiently active is defined as some moderate-intensity equivalent physical activity but less than 150 minutes per week.

[4] Values have been adjusted from 2012 dollars to 2017 dollars using the Consumer Price Index.

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, which is on-the-job productivity losses (Centers for Disease 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 $335,000 per year (Finkelstein & Brown, Why Does the Private Sector Underinvest in Obesity Prevention and Treatment, 2006).[5] A study of more than 10,000 U.S. employees across multiple professions found that absenteeism and presenteeism costs are $243 per year higher for an overweight employee and $634 per year higher for an obese employee (Goetzel, et al., 2010).[6] If a new sports/recreation complex in Helena could encourage local workers to exercise and improve their health, local employers would benefit from greater workplace attendance and higher worker productivity. In addition to attracting and retaining residents, this is another way the proposed facility could indirectly benefit the local economy.

[5] Values have been adjusted for inflation from 2006 dollars to 2017 dollars using the Consumer Price Index.

[6] Values have been adjusted for inflation from 2006 dollars to 2017 dollars using the Consumer Price Index.

4 ECONOMIC IMPACTS OF TOURISM

As was recognized by local residents during the earlier Ballard King study, a new sports/recreation complex has the potential to boost the area's economy by hosting athletic tournaments that attract spending from out-of-town visitors. In this section, we estimate the size of these economic impacts to Lewis and Clark County. In brief, our analysis involved projecting the number of overnight visitors that will attend sports tournaments at the new complex, anticipating their general spending pattern, and estimating how that spending will ripple out through the area's economy. Even under generally conservative assumptions, the results indicate that visitor spending associated with hosting tournaments could support approximately 20 jobs and $488,000 annually in labor income. This level of labor income exceeds the annual budget shortfall for the proposed facility identified in the facility feasibility study of roughly $103,000 to $335,000 (Ballard King & Associates Ltd, 2017).[7] Thus, at the community level, community financial support for the facility to make up for operating losses would likely be more than recouped in total increased community income.

4.1 TOTAL OVERNIGHT VISITATION

In this analysis, we only consider the economic impacts coming from tournament attendees (participants and spectators) who reside outside the County and stay in overnight lodging for tournaments. Visitors who attend a tournament 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 area that would likely not otherwise have been spent (e.g. buying food, fuel, retail items, etc), our estimates represent just a portion of the potential impact of tournaments resulting from the sports complex. Aside from tournaments, the facility may also to bring in out-of-area visitors for single game match-ups, classes, and general use of the facility, which would also increase spending in the area. For these reasons, we consider our estimates to be conservative, with the true economic impact of non-resident visitors being larger.

Our analysis draws from and maintains consistency with the complex's previous feasibility study and economic impact analysis by Ballard King & Associates. Their analysis provided the projected type and number of annual tournaments expected to be hosted at the proposed sports complex, and the number of teams that would participate in the tournaments. An exception is the number of teams participating in swim meets, which we estimated through a website that tracks swim meets throughout the State of Montana (Lee, 2017). The tournament assumptions are outlined in **Table 4-1**.

To project the total number of visitor-days per year, we made a number of assumptions regarding visitor habits. First, we assume that roughly one-third of teams attending tournaments will be from outside the County and will stay in overnight lodging along with their accompanying family, friends, and coaching staff (Ballard, 2017). The number of players per team were estimated based on interviews and diverse sources on sports teams. Each youth team is assumed to bring one coach, while adult teams are assumed to have a player that also serves as the coach or team manager. We assume that each youth competitor will be accompanied by an average of two spectators, and for every two adult competitors, one would be accompanied by one spectator (0.5 spectators per adult competitor). Furthermore, we

[7] The Ballard King analysis projected annual net revenues for the facility, which varied depending on the facilities and accommodations included in the proposed sports/recreational complex.

assume that tournaments will last an average of two days, based on input from Ballard King & Associates. When combined, these assumptions lead to the total visitor-days in the last column of **Table 4-1.**

Table 4-1: Estimated Overnight Visitors for Sport Tournaments

Sport	Group	Total Teams	Out-of-Town Teams	Players per Team	Tournaments per Year	Total Visitor-Days per Year
Basketball	Adult	16	5	12	4	720
Volleyball	Adult	16	5	10	4	600
Indoor Soccer	Adult	16	5	10	4	600
Indoor Flag Football	Adult	16	5	10	1	150
Basketball	Youth	16	5	12	5	1,850
Volleyball	Youth	16	5	12	5	1,850
Indoor Soccer	Youth	16	5	10	5	1,550
Indoor Flag Football	Youth	16	5	10	1	310
Swimming	School	14	5	15	4	1,840
Swimming	Lions Team	14	5	15	6	2,760

Sources: (Ballard King & Associates Ltd, 2017) and Highland Economics analysis.

4.2 Total Visitor Spending

Visitors attending adult tournaments are likely to have different spending patterns than those at youth tournaments. For that reason, we use distinct spending profiles for these two groups. The spending profiles used in this analysis are based on two studies by the University of Montana's Institute for Tourism and Recreation Research. One surveyed out-of-town visitors who attended the 2015 Montana State High School Rodeo Finals in Kalispell; the other surveyed out-of-town visitors who attended the 2016 Spartan Race in Bigfork. These two studies are particularly useful because one attracts youth and families, while the other attracts adults only. In each study, survey respondents were asked to recall 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 two events. **Table 4-2** displays these estimates, and, when combined with the visitor-days outlined in the table above, the estimates provide the projected total spending in Lewis and Clark County that is expected to result from the tournaments.

[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 4-2: Per-Person and Total Spending at Sports Tournaments

Category	Spending per Person per Day [1]		Total Spending		
	Youth	Adult	Youth	Adult	Total
Motel/Hotel/B&B	$39	$31	$396,200	$64,100	$460,400
Restaurant/Bar	$19	$14	$193,000	$29,000	$222,000
Groceries/snacks	$11	$6	$111,800	$12,400	$124,200
Gasoline/diesel	$12	$7	$121,900	$14,500	$136,400
Retail Goods	$24	$12	$243,800	$24,800	$268,700
Entertainment/Recreation	$13	$10	$132,100	$20,700	$152,800
Total	$118	$80	$1,198,900	$165,600	$1,364,500

1/ Estimates were derived from (Schultz, 2015) and (Shultz, 2016). 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 2017 dollars using the Consumer Price Index.

As the first two columns of the table show, these studies indicated that per-person per-day spending is higher for youth sporting events than for adult sporting events. The total daily per-person spending values ($80 and $118) are reasonable in the context of other studies and observations by local experts, whose estimates range from $76 - $129 per person per day for similar events (Barkey & Morrill, 2016); (Crossroads Consulting Services, 2015); (Pentilla, 2016); (Sayler, 2012).[9]

Given the assumptions, a 16-team youth basketball tournament is expected to bring in 185 overnight visitors that generate roughly $44,000 in new visitor spending. An adult basketball tournament is expected to attract 90 overnight visitors that generate over $14,000. These projected values seem conservative when compared to local estimates of similar events. High school soccer tournaments hosted in Helena and Kalispell were estimated to generate between $190,000 and $207,000 when adjusted for team attendance (Friends of Fort Missoula Regional Park, 2012).[10]

The third and fourth columns of table illustrate how youth teams are expected to bring in substantially more tourism dollars than adult teams; over seven times as much, in total. This discrepancy arises primarily from the expectation that there would be twice as many youth tournaments, as well as the assumption that there are four times as many spectators per competitor for youth as compared to adults.

In total, the new sports complex is expected to increase out-of-county tourism spending by more than $1.36 million per year. **Table 4-3** outlines how spending totals in the table above are assigned to different economic sectors in the IMPLAN model. Hotels receive the highest proportion of total visitor spending ($460,000), followed by retail goods ($269,000) and restaurants ($222,000).

[9] Figures have been adjusted for inflation to 2017 using the Consumer Price Index.

[10] Figures have been adjusted for inflation to 2017 using the Consumer Price Index.

Table 4-3: Visitor Spending Impacts by Economic Sector

Spending Category	IMPLAN Economic Sector	Visitor Spending	Employment	Labor Income
Lodging	499 Hotels and motels, including casino hotels	$460,400	5.6	$132,100
Restaurants	501 Full-service restaurants	$111,000	2.8	$58,400
Restaurants	502 Limited-service restaurants	$111,000	1.6	$29,400
Groceries	400 Retail - Food and beverage stores	$124,200	0.7	$18,600
Gas	402 Retail - Gasoline stores	$136,400	0.1	$2,100
Retail Goods	405 Retail - General merchandise stores	$268,700	1.2	$38,200
Entertainment	496 Other amusement and recreation industries	$152,800	3.5	$47,600
N/A	Other sectors	$0	4.0	$161,600
Total	All sectors	$1,364,500	19.5	$488,000

Source: Highland Economics analysis and IMPLAN model for Lewis and Clark County

When a visitor spends money in the Helena area, benefits extend beyond the businesses frequented by the visitors. As economic activity increases at one business, it tends to buy more goods and services from other local businesses. For example, a restaurant that has 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 the last column of **Table 4-3** into total economic impacts; these total impacts, presented in terms of employment and labor income benefits, are presented in **Table 4-4**.

In total, we project that the $1.36 million in overnight visitor spending will support almost 20 local jobs and generate roughly $488,000 in income for local workers. **Table 4-4** displays the breakdown of total economic impacts according to the direct, indirect, and induced effects.

Table 4-4: Total Economic Impact of Overnight Visitors by Effect

Impact Type	Employment	Labor Income
Direct Effect	14.9	$312,124
Indirect Effect	2.3	$86,156
Induced Effect	2.4	$89,685
Total Effect	19.5	$487,966

Source: Highland Economics analysis and IMPLAN model for Lewis and Clark County

These results are particularly interesting when viewed in relation to the feasibility study produced by Ballard King & Associates. That study projected that the annual costs of the sports complex would exceed its annual revenues during the first five years of operation. The annual budget shortfall is estimated to range from roughly $103,000 to $335,000 (Ballard King & Associates Ltd, 2017). But when viewed as a net benefit or net cost to Lewis and Clark County, the benefits from tourism spending at tournaments are expected to outweigh the operating budget shortfall. Thus, at the community level,

community financial support for the facility to make up for operating losses would likely be more than recouped in total increased community income. As outlined above, we consider our estimates to be conservative for a number of reasons, implying that the annual benefits would likely be even higher.

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