

HOME FIELD ADVANTAGE

The Economic Contribution of University of Montana Grizzly Athletics to Missoula County

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Table of Contents

Executive Summary	2
1. Introduction	4
2. The Direct Economic Contributions of Grizzly Athletics.....	4
Grizzly Athletic Department Operations.....	4
Student-Athlete Spending	6
Visting Team Spending.....	6
Event Attendance and Visitor Spending	6
3. The Economic Contribution of Grizzly Athletics	8
Output Contributions	9
Labor Income Contributions.....	10
Employment Contributions	11
Value-Added Contributions.....	12
4. Football Weekend Contribution: Nonresident Spending.....	13
5. Conclusion.....	16
6. References	16
7. Appendix.....	17
About This Study	17
About the Bureau of Business and Economic Research	17
About Grizzly Athletics	17
Study Area and Data Sources	17
Overview of Economic Contribution Analysis	18
Description of IMPLAN Modeling	18
Key Definitions: Direct, Indirect, and Induced Effects	18
Key Terminology.....	18

Executive Summary

Grizzly Athletics at the University of Montana is a defining part of regional identity for students, alumni, and fans—and a major presence in Missoula’s cultural and economic landscape. The program supports the local economy not only by drawing student athletes, their friends and family, and thousands of fans to Missoula, but also through its year-round operations, employment, and local purchasing. Together, these activities generate millions in business revenue, support hundreds of jobs, and contribute significantly to household income across the Missoula economy.

The Bureau of Business and Economic Research (BBER) conducted a detailed analysis of the economic contribution of Grizzly Athletics using the IMPLAN economic modeling framework calibrated to the Missoula County economy and paired with local data. Department expenditures were analyzed at the vendor level, categorized by industry, and adjusted to account for economic leakages and local purchasing behavior in both Missoula and the broader Montana economy. Visitor impacts were estimated using box office data and responses from a BBER-administered survey of non-Missoula County resident football attendees, capturing both the scale and composition of new dollars entering the region. This approach provides a conservative, policy-relevant estimate of how much smaller the Missoula economy would be in the absence of a university athletics program, underscoring the ongoing value of its operations and the seasonal surges that occur during Griz football home games.

The IMPLAN model not only captures the immediate, direct effects of these activities but further estimates the broader ripple effects as dollars circulate through local supply chains and household spending, providing a comprehensive view of Grizzly Athletics’ contribution to the Missoula County economy.

Overall Grizzly Athletics Economic Impact

Grizzly Athletics plays a vital role in the Missoula County economy, generating significant economic activity through its operations, student-athlete presence, and visitor spending. Key findings from this analysis include:

- Grizzly Athletics contributes more than \$94 million in total gross receipts to Missoula County businesses annually.
- The program adds approximately \$58.5 million in local value added, representing its total contribution to county-level GDP.
- Athletics-related activity supports more than \$41.16 million in local labor income, including wages, salaries, and proprietor earnings.
- An estimated 728 jobs are supported across Missoula County, encompassing both wage-and-salary positions and sole proprietorships.

Football Weekend Visitor Spending Impact:

The BBER survey finds that 53% of the attendees at Grizzly Football games travel from outside of Missoula County, and they stay an average of 2.2 days in Missoula per trip.

- A single home football weekend draws \$5.2 million in nonresident visitor spending to Missoula County, including nearly \$1.6 million in accommodations and over \$1.3 million in restaurants and bars.
- Each game supports 52 jobs, \$2.38 million in labor income, and \$3.76 million in local GDP.
- Across an eight-game season, the economic impact scales to 417 jobs, over \$19 million in labor income, and \$30 million in total GDP contribution.

These economic impact estimates for a football weekend are conservative as the visitor spending totals do not include expenditures on game tickets, trip-related spending that occurs outside of Missoula County, or spending by residents that is retained in the county or redirected toward downtown businesses because of the game. Athletic department revenue from the game—and athletic department expenditures on game day operations and to support the football program—are part of the larger Grizzly Athletics economic impact estimates.

These findings underscore the wide-reaching and sustained contribution of Grizzly Athletics to the Missoula economy through both its institutional presence and the visitor-driven activity it helps attract year after year.

1. Introduction

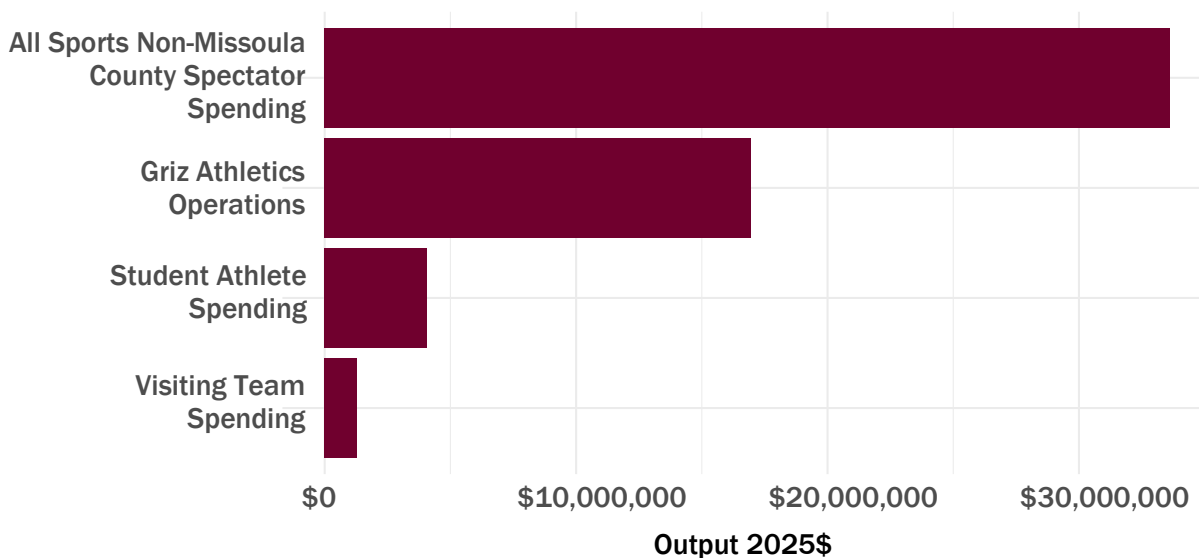
Few events in Missoula are as visible or widely recognized as Grizzly football game days. With a typical home game attracting about 26,000 fans (NCAA Statistics 2025), these events represent a major source of economic activity tied to intercollegiate athletics. Grizzly football has led the Football Championship Subdivision (FCS) in home game attendance for the past two seasons, a distinction driven not only by strong fan support, but also by the program's consistent success, which frequently results in additional home playoff games. Montana has played 42 postseason games at Washington–Grizzly Stadium, winning 35 of them (Becton 2024, updated). These games contribute directly to the local economy through visitor spending—particularly at restaurants, bars, hotels, groceries, and other retail stores—providing widespread support for Missoula's service and hospitality sectors.

While home football games are the largest and most visible impact of Grizzly Athletics in Missoula, the full contribution includes spending by thousands of additional visitors to non-football events, expenditures by visiting teams in Missoula, operational and capital expenditures of UM's Athletics department, and student-athlete spending in the community. In this analysis, visitors to non-football events only includes attendance at other Grizzly athletic events such as basketball or soccer, and does not include concerts, high-school sports, festivals, graduations, and other events that utilize Grizzly Athletic facilities such as Washington-Grizzly stadium and the Adams Center.

2. The Direct Economic Contributions of Grizzly Athletics

While football is a prominent driver, the economic contributions of Grizzly Athletics extend across multiple sports and through the University of Montana Athletics Department's year-round operations, summarized in Figure 1. Most visitor-related spending occurs during the sports calendar, but the department remains a permanent institutional presence that supports employment, income, and vendor activity throughout the year. This section quantifies the direct contribution of University of Montana athletics to the Missoula County economy, referring to the spending by the program's operations, its employees, its athletes, and visitors that would be absent if the area did not host a public university athletics program. These direct contributions are summarized in Figure 1, which presents the estimated economic activity generated within Missoula County.

Figure 1: Summary of Direct Economic Contributions of Grizzly Athletics, Missoula County



Grizzly Athletic Department Operations

Operating expenses provided by the UM Athletics Department show total spending of \$28.6 million in 2024. However, not all of this activity represents new spending or takes place within the local economy. Certain expenditures—such as team travel for away games and recruitment trips—occur outside the region and do not contribute directly to the Missoula County economy. For example, payments to airlines or hotels represent economic leakages, as those dollars leave the local area and do not exclusively support local jobs or businesses. For this reason, BBER’s analysis focuses on the \$17.1 million in operational spending and \$1.5 million in capital expenditures the UM Athletic Department spends annually within Missoula County.

Student-Athlete Spending

Student-athletes contribute to the Missoula economy not only through their participation in athletics but also as temporary residents whose spending supports local businesses. Many would not attend the University of Montana or live in Missoula were it not for their involvement in intercollegiate sports, making their presence an important source of ongoing economic activity tied to the athletics program.

To estimate this contribution, student spending patterns from a 2023 University of Montana economic impact study were applied across the academic year to the more than 330 varsity athletes enrolled in a typical year. This approach produced an estimate of approximately \$6.2 million in spending on housing, food, and other living costs. The total includes cash scholarship support covering non-tuition expenses such as fees, books, and rent, but excludes non-cash tuition discounts, as it does not typically result in a change to university non-athletic operational spending.

While much of this spending occurs within the region, IMPLAN accounts for the area's industry composition using local purchase percentages to estimate direct leakages. Based on these local purchase percentages, approximately \$4.1 million of student-athlete spending was retained in the Missoula economy, while \$2.1 million represented spending on goods and services imported from outside the region. This report makes category-specific adjustments—such as assuming rental housing is predominantly supplied locally—to better align modeled leakages with local economic conditions.

Visting Team Spending

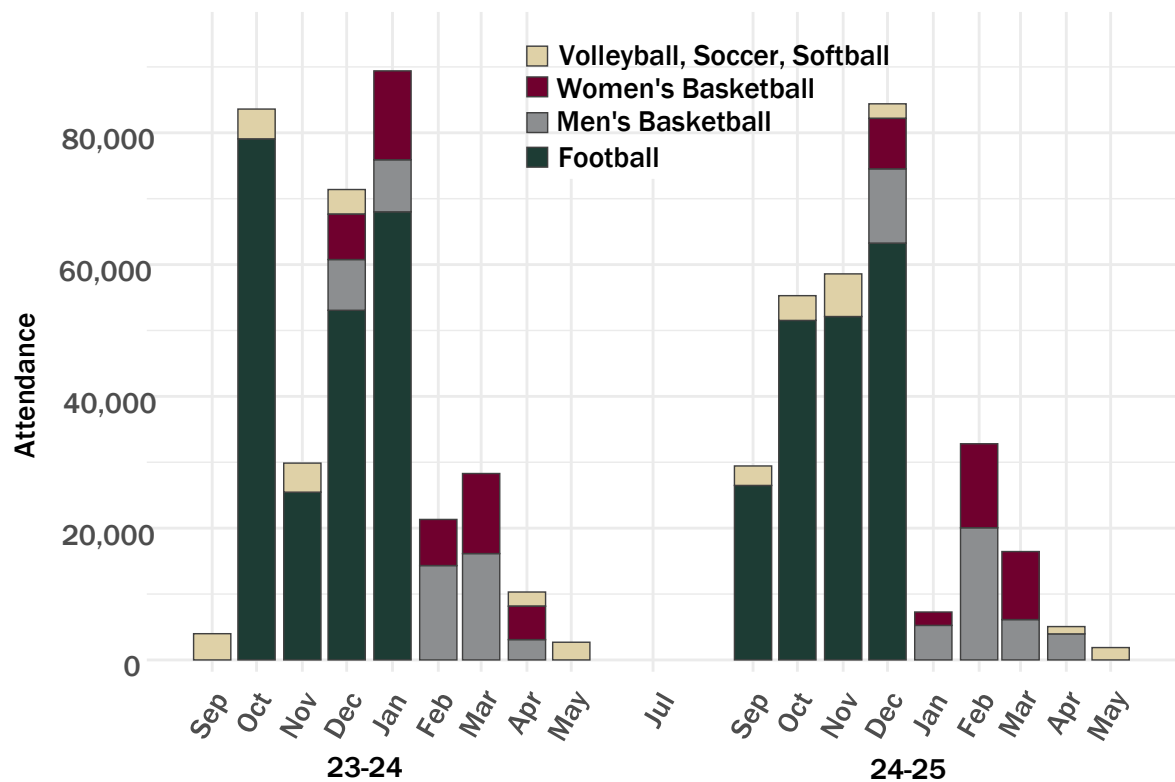
In addition to student-athlete expenditures, athletic events at the University of Montana bring visiting teams and their travel parties to Missoula throughout the academic year. Based on the University of Montana's own team travel expenditures and the number of home athletic events hosted, this report estimates visiting team costs by assuming that expenses incurred while traveling to Missoula are comparable to those the Grizzlies incur when competing in other communities. These costs typically include lodging, meals, local transportation, and other travel-related purchases.

Using this approach, the total annual spending by visiting teams is estimated at approximately \$2.3 million. Applying IMPLAN's local purchase percentages to account for the availability of goods and services within the region, an estimated \$1.3 million of this spending was captured by Missoula businesses, while the remaining \$1 million reflects spending that leaked out of the local economy—such as expenditures on airline tickets or services provided by out-of-region vendors.

Event Attendance and Visitor Spending

Among the various ways Grizzly Athletics contributes to the Missoula economy, none is more substantial than the influx of visitors attending athletic events. From September through May during the 2023 and 2024 calendar years, these athletic events drew an average of more than 35,113 unique fans per month to campus and the surrounding area, generating broad-based spending on lodging, dining, retail, and transportation. Visitor expenditures tied to athletic events represent the most visible—and by far the largest—component of the program's local economic impact. Figure 2 illustrates the monthly home game attendance across all sports from 2023 to 2025, highlighting both the scale and seasonal pattern of athletic-driven visitation to Missoula.

Figure 2 Monthly Home Game Attendance by Sport, 2023 to 2025



Source: NCAA (2004–2025). © NCAA. All rights reserved.

Understanding where ticket buyers come from is key to estimating the economic contribution of Grizzly Athletics. While attendance figures reflect the total number of people at events, ticket sales data—provided by the UM Athletics Department exclusively for this analysis—offer a more precise view of where spectators reside. Table 1 presents the distribution of ticket purchases by location for football and other sports, highlighting the significant share of out-of-county buyers, particularly for football. These proportions form the basis for estimating the non-local share of visitor spending, enabling the analysis to focus on new dollars brought into Missoula’s economy from outside the region.

Table 1 Ticket Buyer Location by Football and Other Sports

Residence	Football	Other sports	All Sports
Missoula County	47.4%	73.4%	55.8%
Montana (non-Missoula)	40.3%	18.0%	33.1%
Out-of-State	12.2%	8.5%	11.0%
Outside Missoula	52.6%	26.6%	44.2%
Total	100.0%	100.0%	100.0%

To estimate the scale and nature of visitor spending tied to Grizzly Athletics, BBER conducted a survey of Grizzly Football season and individual ticket buyers who resided outside Missoula County at the time of purchase. This information was collected by a survey administered on behalf of the University of Montana Athletics Department by the Bureau of Business and Economic Research (BBER) during the period December 11, 2024, through January 22, 2025. BBER sent up to five survey participation requests to a sample of 2,000 2024 ticket buyers who live outside of Missoula County split evenly between season-ticket and individual game ticket purchasers. The survey responses were collected via the internet. BBER obtained survey responses from 953 ticket buyers, a 48% response rate. The data presented here are weighed to ensure that they are representative of the entire population of nonresident season and individual ticket buyers.

The economic impact analysis looks only at spending from spectators who reside outside of Missoula County, because this can be considered new spending in the county. Missoula County residents make up a large share of attendees, 47.4% of football attendance and 73.4% of non-football attendance according to ticket purchase zip codes, and the assumption is that this local-source spending would have occurred within Missoula County in the absence of the sporting event. This is a conservative assumption as Grizzly athletics can retain Missoula County spending locally, and it can also redirect spending within Missoula County toward the downtown and university areas such that the impact on businesses in those neighborhoods is larger than what we present here.

Based on the survey responses, BBER developed two spending profiles: one for Montana residents living outside of Missoula County (40.3% of all football game attendees) and another for out-of-state visitors (12.2% of football game attendees). These profiles provide detailed insights into group size, trip duration, game attendance, and daily spending while in Missoula. Table 2 summarizes this information, which serves as the foundation for estimating the economic impact of football visitors specifically. In total, we find that the average home football game generated \$5.15 million in visitor spending from out-of-county attendees. This figure does not include game ticket purchases or donations to Griz athletics as those funds are accounted for in this economic impact analysis in the modeling of athletic department spending in a separate section.

Table 2 Summary of Football Visitor Spending and Behavior by Residence

<i>Averages</i>	<i>Montana (non-Missoula)</i>	<i>Out-of-State</i>	<i>Outside Missoula</i>
<i>Group Size</i>	2.7	3.2	2.8
<i>Days in Missoula</i>	2.0	3.1	2.2
<i>Games Attended</i>	4.4	2.7	4.1
<i>Spending per group per day</i>	\$327.13	\$500.32	\$342.54
<i>Total spending per game</i>	\$4,037,334	\$1,114,424	\$5,151,759

Grizzly Athletics generates substantial direct economic activity in Missoula through program operations, student-athlete spending, and, most notably, out-of-area visitor spending tied to athletic events. Football drives the largest share of this impact, but events across all sports contribute to local business revenue, particularly in lodging, dining, and retail. Using ticket sales data and survey responses, the analysis estimates that Grizzly Athletics brought in approximately \$33.6 million in non-local visitor spending in 2024 across all sports.

While direct spending captures the immediate economic activity generated by Grizzly Athletics, its full impact extends beyond these initial transactions. The following section examines the indirect and induced effects—how spending by the program, visitors, and student-athletes circulates through the local economy, supporting jobs, income, and additional business activity across Missoula County.

3. The Economic Contribution of Grizzly Athletics

Grizzly Athletics plays a dynamic role in the Missoula economy, not just as a cultural cornerstone, but as a source of sustained economic activity. The presence of Grizzly Athletics drives spending, supports jobs, and generates income that would not otherwise occur in the region. This activity affects the economy both directly—through department operations, visitor and student-athlete spending—and indirectly, as those dollars circulate through local businesses and households.

This section presents the total economic contribution of Grizzly Athletics, estimating how much larger and more active the Missoula economy is today because of the program’s ongoing operations. The analysis captures the full range of economic effects using IMPLAN, and economic impact model described in more detail in the Appendix. IMPLAN traces how spending ripples through the regional economy in three stages:

- **Direct Effects** – The immediate spending by Grizzly Athletics and associated visitors and students within the local economy.
- **Indirect Effects** – Business-to-business transactions within the local supply chain that result from this initial activity.

- **Induced Effects** – Local household spending generated by wages paid to employees and contractors involved in both the direct and indirect activities.

Together, these effects illustrate the broad and interconnected economic footprint of Grizzly Athletics across Missoula County. These impacts are summarized by indicator in the following sections.

Output Contributions

Economic output represents the total value of goods and services produced in Missoula County because of Grizzly Athletics. It includes the full range of business revenues generated, whether from ticket sales and facility operations, local hospitality and retail businesses serving visitors, or suppliers supporting the athletics department. Output provides a broad measure of the total scale of economic activity generated by the program.

Table 3 presents the contribution to gross receipts (output) across all impact types and shows how this activity is distributed across industry groups in Missoula County. This includes both the immediate spending tied to Grizzly Athletics and the cascading effects that ripple through the broader economy.

Table 3: Gross Receipts Contribution of Grizzly Athletics by Impact Type and Industry Group, Missoula County

<i>Industry</i>	<i>Direct</i>	<i>Indirect</i>	<i>Induced</i>	<i>Total</i>
<i>Food Services</i>	\$12,925,622	\$840,280	\$1,432,554	\$15,198,456
<i>Accommodation Services</i>	\$12,461,871	\$1,631	\$33,485	\$12,496,986
<i>Employment and Payroll of Government</i>	\$11,485,608	\$0	\$0	\$11,485,608
<i>Wholesale and Retail</i>	\$6,933,805	\$1,394,159	\$3,637,758	\$11,965,722
<i>All Other Personal and Support Services</i>	\$3,165,935	\$9,094,552	\$6,341,312	\$18,601,799
<i>Arts, Entertainment, and Recreation</i>	\$2,870,123	\$436,629	\$523,052	\$3,829,804
<i>Transportation and Travel Services</i>	\$2,773,422	\$214,781	\$233,355	\$3,221,558
<i>Construction</i>	\$1,714,186	\$448,330	\$193,929	\$2,356,445
<i>Housing and Real Estate Services</i>	\$626,103	\$2,328,433	\$4,060,199	\$7,014,734
<i>Health and Social Services</i>	\$605,835	\$8,411	\$4,339,006	\$4,953,252
<i>Utilities</i>	\$150,465	\$803,105	\$383,705	\$1,337,275
<i>Other Goods-Producing Industries</i>	\$115,940	\$221,379	\$140,637	\$477,956
<i>Logistics and Industrial Transportation</i>	\$106,037	\$693,852	\$440,976	\$1,240,866
<i>Total</i>	\$55,934,952	\$16,485,542	\$21,759,966	\$94,180,460

Grizzly Athletics generated more than \$94 million in total economic output, representing gross receipts to Missoula businesses across a wide range of industries. Gross receipts reflect total business revenues and do not account for the costs of producing goods and services. Direct output impacts were concentrated in food services, accommodation, entertainment, and public employment, those industries most immediately connected to the operations of Grizzly Athletics and the visitors. Indirect effects, which result from local business-to-business transactions, were strongest in services, logistics, and wholesale and retail trade. Induced effects—driven by household spending from those whose employment is supported by this activity—boosted revenues for sectors such as health care, housing, and services.

A significant share of gross receipts goes toward covering production costs, with labor being one of the largest components. Wages, salaries, and benefits paid to workers across these industries represent a key channel through which Grizzly Athletics contributes to household income and supports local livelihoods. The following section examines these labor income contributions in more detail.

Labor Income Contributions

Labor income captures the earnings that flow to individuals because of economic activity tied to Grizzly Athletics. This includes two key components: employee compensation, such as wages, salaries, and benefits paid to workers, and proprietor income, which reflects the earnings of sole proprietors, often small business owners, who provide goods and services connected to the program's operations.

Direct labor income made up the largest share, driven by the UM Athletics Department operations, game-day spending, and other immediate effects. Indirect labor income reflects earnings in the supply chain, for example, vendors, wholesalers, and service providers, while induced effects capture the income supported by household spending across the broader economy.

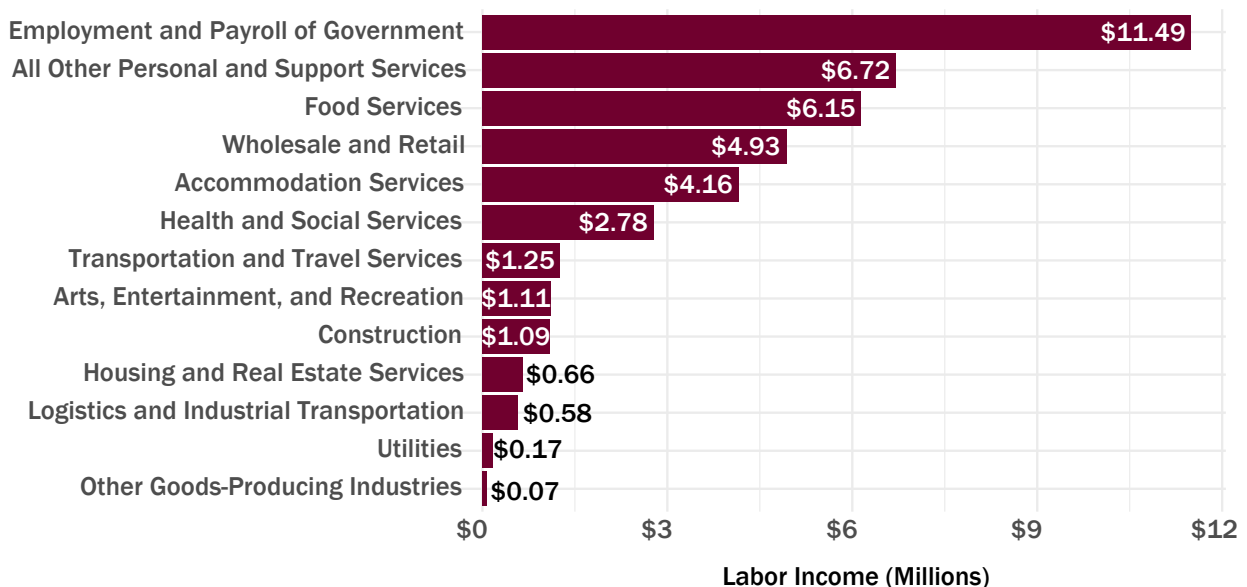
Table 4 Labor Income of Grizzly Athletics by Impact Type and Worker Classification (Millions), Missoula County

<i>Impact</i>	<i>Employee Compensation</i>	<i>Proprietor Income</i>	<i>Labor Income</i>
<i>Direct</i>	\$25.00	\$3.13	\$28.13
<i>Indirect</i>	\$4.42	\$0.98	\$5.40
<i>Induced</i>	\$6.50	\$1.13	\$7.63
Total	\$35.92	\$5.24	\$41.16

Table 4 shows that total labor income attributable to Grizzly Athletics exceeded \$41 million in Missoula County. The majority of this—nearly \$36 million—came from employee compensation across direct, indirect, and induced effects. Proprietor income accounted for more than \$5 million, highlighting the important role that local entrepreneurs and small businesses play in delivering services such as food, lodging, transportation, and personal care services.

Figure 3 further breaks down labor income by industry groups, illustrating how earnings tied to Grizzly Athletics are distributed across sectors in Missoula County.

Figure 3: Labor Income Contribution of Grizzly Athletics by Industry, Missoula County



The largest labor income gains appear in employment and payroll of government education and the broad category of personal and industry support services, reflecting both the direct role of the university and the wide-reaching indirect and induced effects across the local service economy.

Employment Contributions

Grizzly Athletics supports an estimated 728 jobs across Missoula County, including both wage-and-salary positions and sole proprietors. As shown in Table 5, most of these jobs are the result of direct impacts—510 in total—with 432 traditional employees and 78 sole proprietors tied to the operations of the Grizzly athletics program, visitor activity, and related spending. An additional 91 jobs are supported through indirect supply chain effects and 127 jobs through induced effects as a fraction of employee and proprietor income is spent locally.

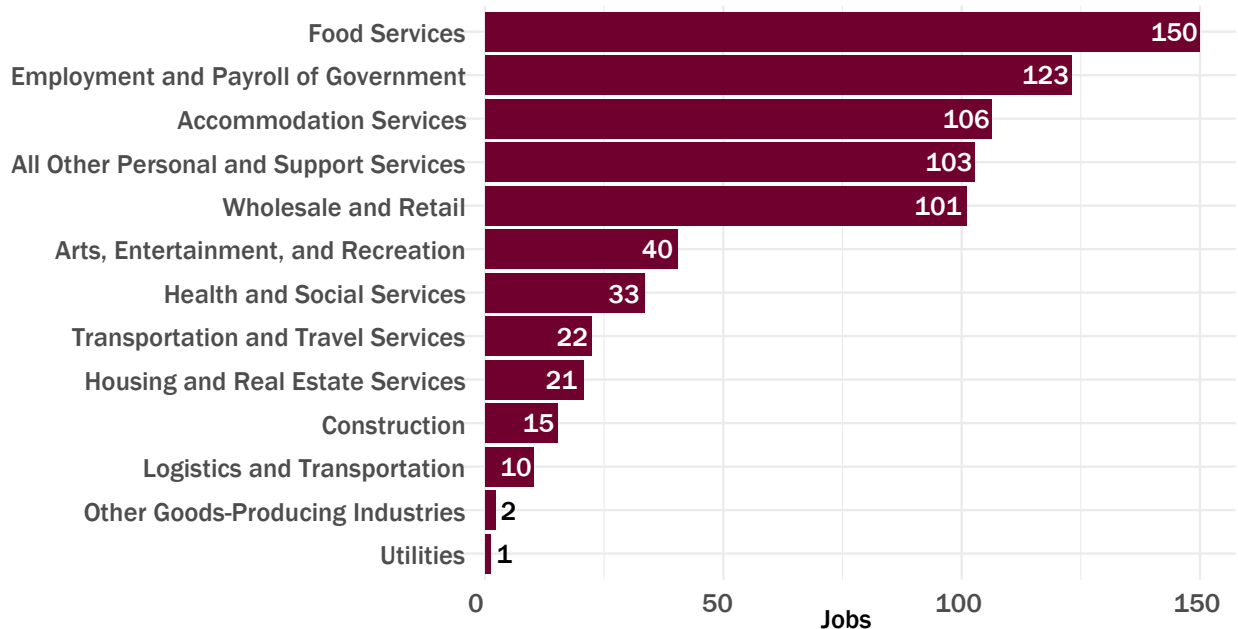
IMPLAN defines employment as the total number of full- and part-time jobs, measured on an annualized basis. This means that jobs supported over the course of the year—regardless of whether they are seasonal, part-time, or full-time—are included in the total.

Table 5: Employment Contributions of Grizzly Athletics by Impact Type and Worker Classification, Missoula County

<i>Impact</i>	<i>Wage And Salary</i>	<i>Proprietor</i>	<i>Total</i>
<i>Direct</i>	432	78	510
<i>Indirect</i>	56	35	91
<i>Induced</i>	96	31	127
Total	584	144	728

Figure 4 shows how employment contributions from Grizzly Athletics are distributed across major industry groups in Missoula County. The largest number of jobs is supported in food services, a sector characterized by high volumes of employment but relatively lower average wages. The second-largest employment impact appears in employment and payroll of government education, which, while supporting fewer positions than food services, tends to offer significantly higher salaries and benefits. This contrast reflects the range of low- and high-income jobs supported by Grizzly Athletics—from part-time service roles to full-time professional positions.

Figure 4: Employment Contributions of Grizzly Athletics by Industry Group, Missoula County



Value-Added Contributions

Value added represents the difference between an industry’s total output and the cost of its intermediate inputs. It reflects the local economic value created through wages, salaries, proprietor income, and business profits. As such, value added is the appropriate measure of Grizzly Athletics’ contribution to Missoula County’s gross domestic product (GDP).

Grizzly Athletics contributed an estimated \$58.5 million in total value added to the Missoula economy. This figure captures the local income and economic returns generated not only by the UM Athletics Department itself, but also by the many businesses and households impacted by related supply chain activity and local spending.

Figure 5: GDP Contributions of Grizzly Athletics by Event and Impact Type, Missoula County

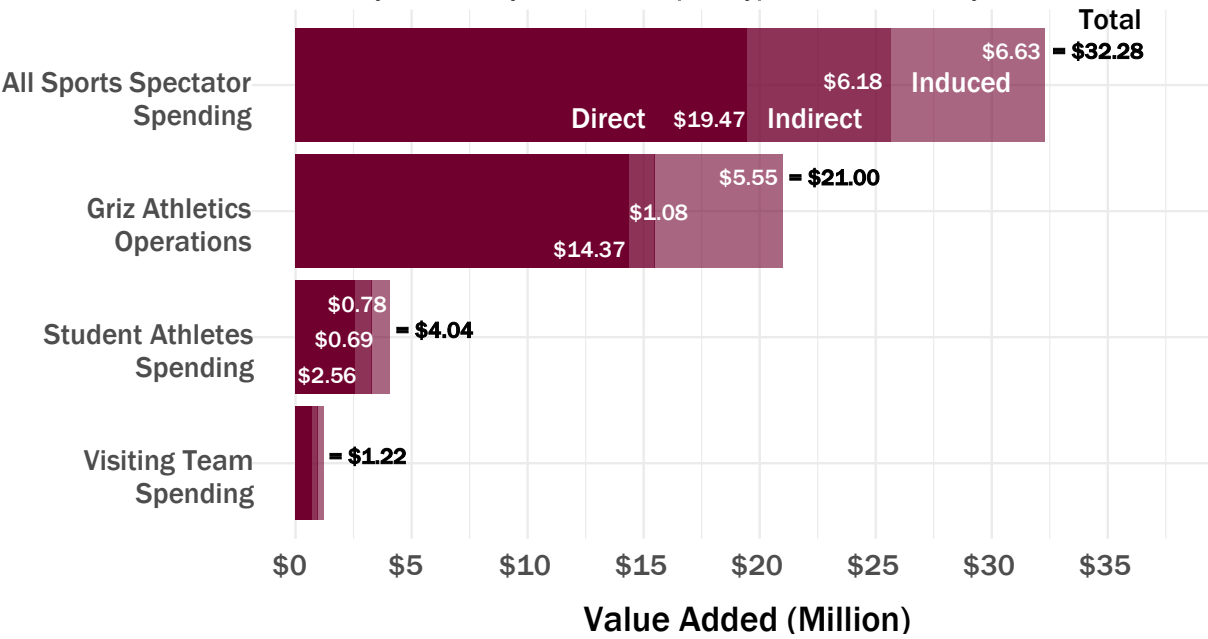


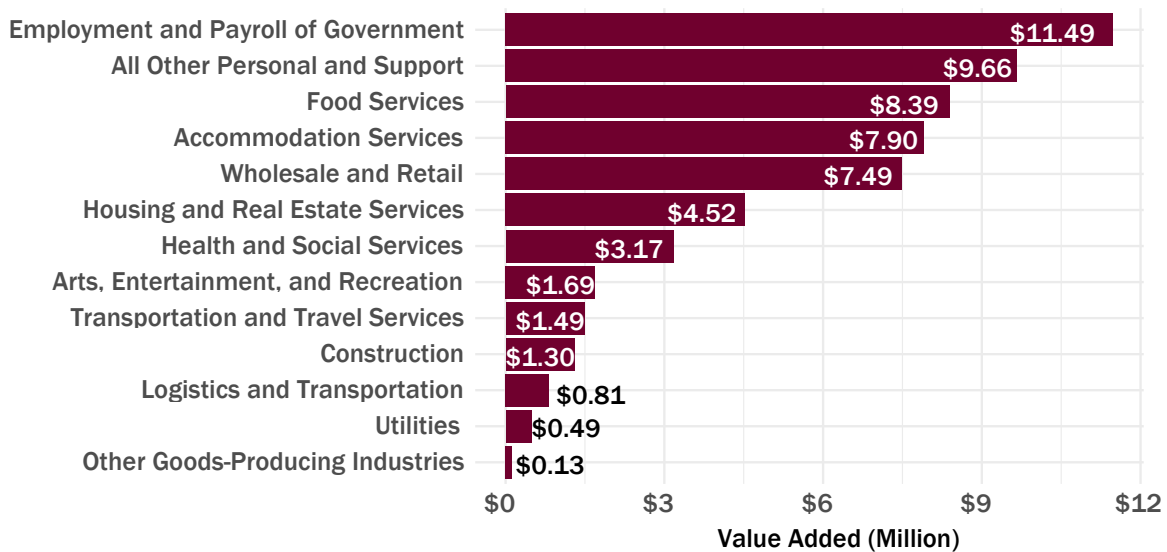
Figure 5 shows how these GDP contributions break down by impact type and category of economic activity. Direct impacts account for the largest share of value added, especially those tied to spectator spending and the core operations of Grizzly Athletics. Among all activity categories, spectator spending generates the largest direct GDP contribution, driven by fan expenditures on food, lodging, and retail during athletic events.

Indirect and induced effects from spectator-related activity are also significant, each contributing between \$6 million and \$7 million. These effects reflect the extended reach of visitor dollars as they circulate through local suppliers and households. Overall, the results underscore how both institutional operations and visitor-driven activity translate into broader economic value across Missoula County.

Figure 6 shows the breakdown of value-added contributions by major industry groups. A substantial share of the GDP contribution originates from the UM Athletics Department’s own operations, particularly through its compensation of staff. These wages not only contribute directly to local GDP but also generate induced impacts as employees spend their income within the Missoula economy—supporting additional value creation in sectors such as retail, housing, health care, and personal services.

This pattern highlights how institutional payroll serves as a key driver of local economic value, creating ripple effects that extend well beyond the university itself.

Figure 6: GDP Contributions of Grizzly Athletics by Industry Group, Missoula County



Grizzly Athletics makes a significant and far-reaching contribution to the Missoula County economy. Through its operations, visitor spending, and the presence of student-athletes, the program generates over \$94 million in total economic output, supports approximately 728 jobs, and contributes \$58.5 million to local GDP. It also results in more than \$41.16 million in labor income, flowing to both wage-earning employees and sole proprietors across the region.

These impacts span a diverse set of industries—from food services and retail to real estate, health care, and personal services, reflecting the broad economic reach of Grizzly Athletics. By generating income, supporting employment, and driving demand across the local economy, the program serves not only as a source of community stability but also as a key contributor to Missoula’s economic vitality.

4. Football Weekend Contribution: Nonresident Spending

Each fall, home football games bring a surge of visitors to Missoula, many of whom travel from outside the region to attend. These weekends represent more than just a cultural event; they also attract a wide array of new spending in the local economy.

The BBER found that:

- Nonresident visitors spend an estimated \$5.2 million per game in Missoula County.
- This spending results in \$3.9 million in direct gross receipts to local businesses and \$6.6 million in total gross receipts after accounting for indirect and induced effects.
- Each game supports approximately 52 jobs, \$2.38 million in labor income, and \$3.8 million in local GDP.
- Over the course of an eight-game season, that translates to 417 jobs, more than \$19 million in labor income, and \$30 million in total GDP contribution.

Table 6 details the average per-game spending by nonresident single-game and season ticket holders, based on a survey conducted by BBER. These expenditures represent new dollars entering the Missoula economy—supporting local businesses in hospitality, retail, and services on game-day weekends.

Table 6: Breakdown of Nonresident Spending per game, Missoula County

Spending Category	Amount
<i>Hotels and accommodations</i>	\$1,575,189
<i>Restaurant, bar, or food truck</i>	\$1,332,360
<i>Retail goods</i>	\$791,236
<i>Gasoline and diesel</i>	\$403,796
<i>Entertainment and recreation</i>	\$341,558
<i>Groceries</i>	\$335,561
<i>Airfare</i>	\$164,036
<i>Other</i>	\$87,113
<i>Retail services</i>	\$37,451
<i>Auto rental</i>	\$36,994
<i>Local transit</i>	\$26,503
<i>Campground or RV park</i>	\$19,961
<i>Total</i>	\$5,151,759

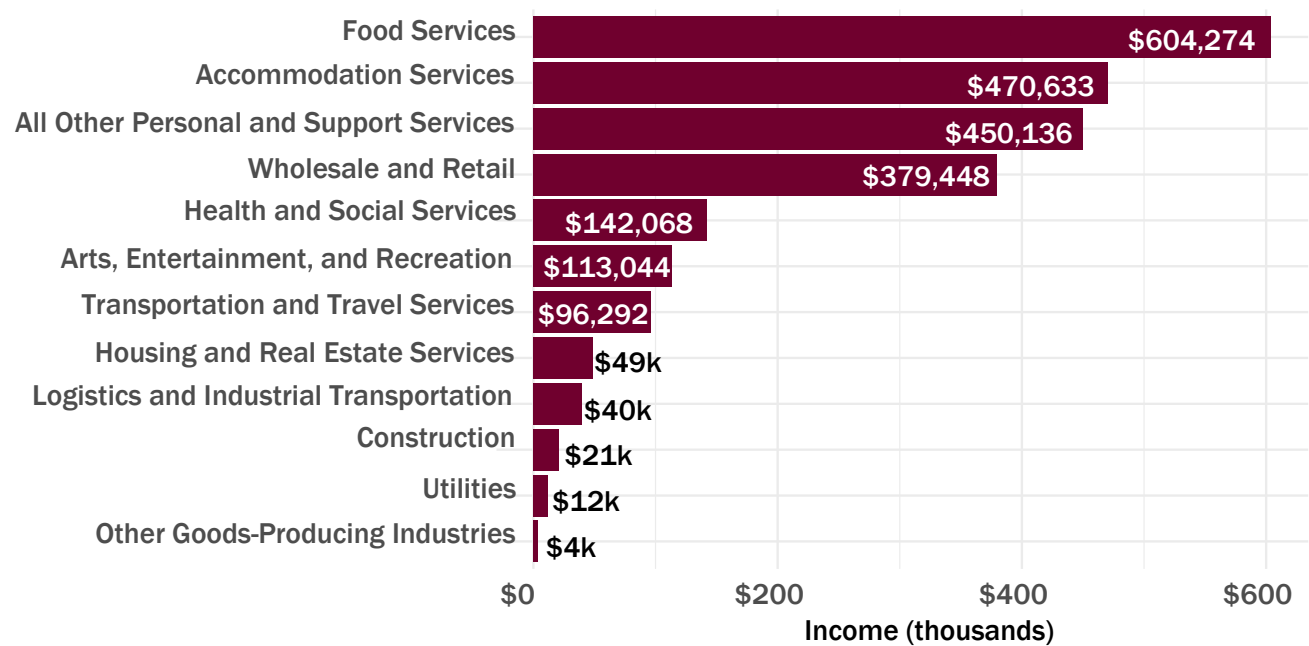
Not all visitor spending remains local due to direct margin leakage. Portions of purchases such as lodging or retail goods are attributed to non-local wholesalers or suppliers. Of the \$5.2 million spent per game, about \$3.9 million results in direct receipts to Missoula County businesses.

Table 7: Football Weekend Gross Receipts (Output) by Impact Type and Industry

Industry	Direct	Indirect	Induced	Total
<i>Accommodation Services</i>	\$1,413,011	\$144	\$1,965	\$1,415,120
<i>Food Services</i>	\$1,332,341	\$85,612	\$83,561	\$1,501,513
<i>Wholesale and Retail</i>	\$524,889	\$112,119	\$211,960	\$848,968
<i>Arts, Entertainment, and Recreation</i>	\$317,716	\$42,057	\$30,535	\$390,308
<i>Transportation and Travel Services</i>	\$240,676	\$17,743	\$13,646	\$272,066
<i>All Other Personal and Support Services</i>	\$84,269	\$792,669	\$370,011	\$1,246,949
<i>Other Goods-Producing Industries</i>	\$68	\$14,633	\$8,197	\$22,897
<i>Construction</i>		\$44,637	\$11,317	\$55,954
<i>Health and Social Services</i>		\$112	\$253,089	\$253,201
<i>Housing and Real Estate Services</i>		\$217,542	\$236,935	\$454,478
<i>Logistics and Industrial Transportation</i>		\$54,175	\$25,711	\$79,887
<i>Utilities</i>		\$76,567	\$22,331	\$98,898
<i>Total</i>	\$3,912,970	\$1,458,011	\$1,269,259	\$6,640,240

As summarized in Table 7, this direct activity generates additional ripple effects across the economy. When accounting for business-to-business purchases and household spending by employees, total gross receipts rise to nearly \$6.6 million. The largest indirect and induced impacts occur in personal and support services, health and social services, retail, and housing—sectors influenced as both local businesses and their employees spend additional income in Missoula throughout the year. These effects illustrate how nonresident visitor spending not only benefits frontline sectors like food and accommodations in the fall but further supports a more sustained range of local industries throughout the year.

Figure 7 Football Weekend Labor Income by Industry



A substantial share of football weekend-related revenue goes toward labor income, particularly in service-oriented industries such as food services, accommodations, and personal care, shown in Figure 7. This income benefits workers across Missoula’s economy. On average, a single-game weekend supports 52 jobs and generates approximately \$2.38 million in labor income. Over the course of an eight-game home season, that impact totals 417 jobs and more than \$19 million in labor income—demonstrating how nonresident visitor spending consistently supports local employment and household earnings throughout the year.

Table 8 Football Weekend GDP Contribution

Impact Type	Value Added
Direct	\$2,266,528
Induced	\$772,300
Indirect	\$719,177
Total	\$3,758,005

In total, football weekends contribute an estimated \$3.8 million to Missoula County’s GDP per game, as shown in Table 8. Most of this value—over \$2.3 million—comes from direct impacts tied to visitor spending at local businesses, while the remainder is generated through secondary effects across the Missoula supply chain and households. These results underscore the substantial economic value of Grizzly football weekends, which bring in new dollars each fall season, support hundreds of jobs and local incomes, and contribute meaningfully to the overall economic output and value within Missoula County.

5. Conclusion

Grizzly Athletics delivers substantial and wide-ranging economic benefits to Missoula County. Through its ongoing operations, visitor spending, and the presence of student-athletes, the program stimulates local business activity, supports jobs, and contributes significantly to household incomes and regional GDP.

These contributions are both structural and seasonal. Core operations generate sustained, year-round impacts, while football weekends deliver concentrated bursts of economic activity each fall period that typically occurs outside of Missoula's peak tourism season. This timing enhances the program's economic value by driving new spending during a slower period for local businesses.

Grizzly football has led the Football Championship Subdivision (FCS) in home game attendance for the past two seasons, a distinction fueled not only by passionate fan support, but also by the program's consistent success. This strong draw helps bring thousands of nonresident visitors to Missoula each season, magnifying the reach and relevance of the athletics program as both a cultural and economic asset.

Interpretation and Key Takeaways

- Ongoing operations matter. Grizzly Athletics' year-round expenditure on staff, facilities, and student-athletes creates a stable foundation for economic activity, particularly in education, services, and public employment.
- Game-day weekends are a major economic event. Each football weekend brings in millions in visitor spending, supporting local jobs and business revenue across hospitality, retail, and service sectors.
- Seasonal timing adds value. These game-day impacts occur during Missoula's shoulder tourism season, filling hotel rooms, restaurants, and storefronts at a time when activity would otherwise be lower.
- Impacts are broad-based. Economic activity tied to Grizzly Athletics supports businesses and workers across a wide range of industries—not just those directly tied to sports or university.
- Labor income is a key channel. More than \$41 million in labor income is supported annually by Grizzly Athletics activity, including wages to employees and earnings to sole proprietors and small business owners.
- Football season magnifies the impact. Over eight home games, football weekends alone generate over \$30 million in local GDP and support 417 jobs, contributing meaningfully to fall-season economic strength.

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www.IMPLAN.com

7. Appendix

About This Study

This report presents an analysis of the economic contribution of Grizzly Intercollegiate Athletics to the Missoula County economy. It reflects changes in both methodology and research framing since the Bureau of Business and Economic Research (BBER) last conducted a similar analysis in 2015.

In line with BBER's commitment to continuous improvement, the current study uses a more conservative and policy-relevant modeling approach to isolate the ongoing economic activity supported by Grizzly Athletics. The research question guiding this analysis is: What would the Missoula economy look like in the absence of the ongoing operations of a public university athletics department? This framing focuses on annual operations, student-athlete and visitor spending, and routine capital outlays, and excludes one-time impacts related to construction of facilities or long-term demographic change. Further information on the updated modeling approach and how it differs from the previous study is provided in the Technical Notes section.

This report was funded by the University of Montana's Athletics Department. The Bureau of Business and Economic Research (BBER) is solely responsible for the statements and conclusions included in this report. BBER would like to thank Grizzlies Athletics for their support and guidance throughout the report process.

The authors of this report are Jeffrey Michael, Derek Sheehan, and John Baldrige. The BBER is solely responsible for any errors or omissions in this report.

About the Bureau of Business and Economic Research

The Bureau of Business and Economic Research (BBER) has been providing information about Montana's state and local economies for more than 75 years. Housed on the campus of the University of Montana, the Bureau is the research and public service branch of the College of Business. On an ongoing basis, the Bureau analyzes local, state, and national economies; provides annual income, employment and population forecasts; conducts extensive research on forest products, manufacturing, health care; designs and conducts comprehensive survey research at its on-site call center; presents annual economic outlook seminars in cities throughout Montana; and publishes the award-winning Montana Business Quarterly. To learn more about the Bureau, contact us or visit our website: www.bber.umt.edu.

About Grizzly Athletics

The University of Montana is a member of the Big Sky Conference and affiliated with Division I of the National Collegiate Athletic Association (NCAA). UM competes in 13 varsity sports – 8 women's and 5 men's – and is a member of the Football Championship Subdivision (FCS). Grizzly Athletics' purpose is to provide a sound, competitive intercollegiate athletics program that represents the University in an impeccable manner and provides student athletes the opportunity to develop physically, mentally, ethically, and socially. The University is committed to a philosophy of excellence and the Athletic Department mirrors this sentiment. It is the goal of the Athletic Department to serve and direct student-athletes along a path that combines their educational pursuits along with athletic participation. Accordingly, the Athletics Department will create an environment wherein all student athletes regardless of gender, ethnicity, race, national origin, color, creed, sexual orientation, age, disability, or religion are given the opportunity to participate and succeed both academically and athletically. The function of the Athletic Department is to work closely with the UM campus community, alumni, friends of the University, and the greater surrounding community to achieve our mission.

Study Area and Data Sources

The study area for this analysis is Missoula County, Montana, reflecting the local geographic scope in which Grizzly Athletics operates and generates economic activity. The analysis uses:

- Financial data from the University of Montana's Athletics Department.
- Visitor spending estimates derived from a custom survey conducted by BBER.
- Employment and operational assumptions developed in consultation with University of Montana staff.

- Regional economic data and multipliers sourced from IMPLAN 2023 data for Missoula County.

All dollar values are reported in 2025 dollars.

Overview of Economic Contribution Analysis

This study estimates the economic contribution of Grizzly Athletics to Missoula County by quantifying the business activity, jobs, labor income, and GDP supported by the program's operations and associated spending. The analysis distinguishes between the effects of year-round operations and the concentrated visitor spending tied to home football games. Results reflect the total economic footprint generated by both institutional spending and the downstream impacts as those dollars circulate through the local economy.

Description of IMPLAN Modeling

To estimate these effects, this analysis uses the IMPLAN modeling system—an input-output (I-O) framework widely used by economists to assess how spending flows through a regional economy. IMPLAN models local inter-industry relationships using detailed national economic data that is adjusted to reflect county-level conditions, including industry structure, employment, and household spending patterns.

The model allows us to trace how initial spending, whether by Grizzly Athletics or its visitors, generates ripple effects across Missoula County businesses, employees, and households.

Key Definitions: Direct, Indirect, and Induced Effects

The results of this study are presented using three standard economic effect types defined by IMPLAN:

- **Direct Effects:** The immediate economic activity resulting from Grizzly Athletics operations, visitor spending, and student-athlete expenditures.
- **Indirect Effects:** Business-to-business purchases made by local suppliers in response to the direct spending—capturing the impact through the supply chain.
- **Induced Effects:** The economic activity generated when employees and proprietors supported by direct and indirect effects spend their income locally on goods and services.

Together, these effects provide a comprehensive view of how spending tied to Grizzly Athletics contributes to the broader Missoula economy.

Key Terminology

The following is a list of important terminology used in IMPLAN.

<i>Input-Output</i>	A type of applied economic analysis that tracks the interdependence among various producing and consuming industries in an economy; it measures the relationship between a given set of demands for final goods and services, and the inputs required to satisfy those demands
<i>Industries</i>	The different IMPLAN Industry codes based on definitions put forth by the Bureau of Economic Analysis (BEA); there is a crosswalk available between NAICS codes and IMPLAN Industries
<i>Output</i>	The value of industry production; in IMPLAN these are annual production estimates for the year of the dataset in producer prices <ul style="list-style-type: none"> • for Manufacturers, output = sales plus/minus change in inventory • for service sectors, output = production = sales • for retail and wholesale trade output = gross margin (not gross sales)
<i>Employment</i>	An industry-specific mix of full-time, part-time, and seasonal employment. An annual average that accounts for seasonality and follows the same definition used by the Bureau of Labor Statistics (BLS) and Bureau of Economic Analysis (BEA). IMPLAN Employment is not equal to full-time equivalents.
<i>Labor Income</i>	All forms of employment income, including employee compensation (wages and benefits) and proprietor Income
<i>Employee Compensation</i>	Total payroll cost of the employee including wages and salaries, all benefits (e.g., health, retirement) and payroll taxes

<i>Proprietor Income</i>	The current-production income of sole proprietorships, partnerships, and tax-exempt cooperatives. Excludes dividends, monetary interest received by non-financial business, and rental income received by people not primarily engaged in the real estate business (BEA).
<i>Value Added</i>	The difference between an industry's or establishment's total output and the cost of its intermediate inputs; it is a measure of the contribution to GDP
<i>Intermediate Inputs</i>	Purchases of non-durable goods and services such as energy, materials, and purchased services that are used to produce other goods and services rather than for final consumption
<i>Taxes on Production & Imports Net of Subsidies (TOPI)</i>	Includes sales and excise taxes, customs duties, property taxes, motor vehicle licenses, severance taxes, other taxes, and special assessments
<i>Other Property Income (OPI)</i>	Gross Operating Surplus minus proprietor income; it includes consumption of fixed capital (CFC), corporate profits, and business current transfer payments (net)
<i>Multipliers</i>	Multipliers are a measure of an industry's connection to the wider local economy by way of input purchases, payments of wages and taxes, and other transactions. It is a measure of total effects per direct effect within a region.
<i>Industry Contribution Analysis (ICA)</i>	Industry Contribution Analysis is a method used to estimate the value of an industry or group of industries in a region, at their current levels of production.
<i>Multi-Regional Input-Output Analysis (MRIO)</i>	MRIO analyses utilize interregional commodity trade and commuting flows to quantify the demand changes across regions stemming from a change in production and/or income in another region. It measures the economic interdependence of regions.
<i>Leakages</i>	Economic activity associated with the modeled event(s) that does not generate additional effects in the defined region