

March 30, 2005

Governor Brian Schweitzer  
Senator Max Baucus  
Senator Conrad Burns  
Representative Denny Rehberg

Honored Citizens:

Please allow me to share with you some economic information pertaining to the future of our great state of Montana. The information relates to the substantial and positive economic benefit resulting from the restoration of wolves to the Great Yellowstone Ecosystem (GYE).

I have just completed a survey defining the minimum potential annual income to the GYE derived from educational programs and tourism (hereafter collectively referred to as programs). To link the financial input as closely as possible to the gray wolf (Canis lupus), I identified only organizations potentially offering programs where the word "wolf" was used either in the title or program description as a promotional sales tool to attract the public. A second category included programs where wolf was not used as a promotional term but where the program took advantage of wolves to increase the benefit to their customers, for example, a wildlife watching program.

Please, let me concisely summarize the database of information from the survey. For the year 2005, thirty-four organizations (listed below) were identified as potential "wolf-based" outfitters under category 1. From advertisements or interviews, I was able to obtain information from 27 of the 30 organizations. These 27 organizations represent the greatest volume of program offerings, but are still a minimum. The 27 organizations offer 569 departure dates during 2005, providing opportunities for 6,165 participants, at an average cost of \$761 per person (program costs varied from \$45 for one day to \$3,300 for 7 days). The total potential income is \$4,690,134 for 2005. A minimum estimate of the increased income provided to programs that simply took advantage of wolves (category 2) to enhance the experience of wildlife related programs is another \$234,348 (494 people). The total of \$4,924,482 represents a minimum amount and dramatically underestimates income provided by walk-on day tours.

To put these numbers in perspective, several salient points deserve elucidating. First, is the growth of the wolf education industry. In 1995, the first year of wolf restoration, through my company, A Naturalist's World and the Yellowstone Association Institute, I taught the first and only four classes about wolves in the Greater Yellowstone Ecosystem. In the year 2000, at a meeting of the Montana Outfitters Board, I reported on my survey which by then included 11 organizations offering 57 departure dates. The growth of the wolf education/tourism business to 2005 has been phenomenal and, at least, two horseback outfitters are now offering trips where wolf observations are used to enhance their potential viewing experience for clients. Additionally, six countries, Canada, England, France, Germany, Japan, and Netherlands, were identified with programs repeatedly bringing tours to the Yellowstone because of wolves.

As I reported in my book, *Yellowstone Wolves in the Wild* (Riverbend Press, Helena, 2003), June 26<sup>th</sup> of 2002, the 100,000th visitor was counted actually viewing wolves. Over the seven years from 1995 to 2002, that represents an approximate average of 14, 285 visitors per year viewing wolves. The figure of 14,285 includes clientele of outfitters, but also shows the additional number of non-guided people coming to the GYE on their own. The additional non-guided income beyond that of outfitter programs is substantial and the number of successful wolf observers per year has continued to increase beyond the 14,000 since 2002.

Second, the influx of wolf dollars has a different community distribution than other outfitting activities. Most of the wolf-associated income enters the GYE from the north and northeast through Gardiner and Cooke City, Montana. Wolf dollars represent a significant off-season financial input to local communities. While wolf tourism is a year-round industry, much of the income is during the off-seasons of late fall and late spring. Dollars are also distributed through a variety of outfitters employing a significant number of teachers, instructors, guides, and support personnel.

The influx of wolf-based dollars spans other GYE financial centers. For example, there have been a minimum of 11 books written, in whole or at least in part, about restoration of wolves to Yellowstone (list attached), with another one currently in press. These books have sold tens of thousands of copies providing hundreds of thousands of dollars to the Montana economy. It should be noted that six of the books were published by publishers from the GYE.

Each year, my company, A Naturalist's World, produces laminated, colored wolf charts (attached to letter to Governor and Federal Senators and Representative). These charts allow interested people to participate in wolf restoration by "knowing" the wolves. We sell over 4,000 charts which retail at \$4.95, representing another significant economic input for local retailers. Part of these proceeds are also donated to the Wolf Fund (see below).

Of particular note is the influx of donations, mostly from out of state, to the Wolf Fund administered by the Yellowstone Park Foundations for scientific research of wolf-related biological processes in the ecosystems. Donations are in the hundreds of thousands of dollars. These funds are spent on local contractors, such as airplane pilots, and in the local communities to purchase supplies and services for research.

For this survey, no attempt was made to calculate the monies spent at local restaurants, hotels, gas stations, float trip outfitters, book stores, tourist centers, or national park visitor centers. It is significant that the average wolf watcher brings the entire family and spends many nights in local establishments during their quest for wolves. The sale of wolf-based items such as wolf-specific books, wolf charts, t-shirts, souvenirs, and other memorabilia also cannot be overlooked.

Third, for the record, I am a hunter and have earned personal income from the hunting community for the last 40 years. It should be noted that income from both hunting and other outfitting enterprises is both critical to the survival of the GYE economy and different types of outfitters SHOULD NOT be played off against each other.

I am very sensitive to the plight of the local hunting outfitter whose clientele has declined during recent years. I am also very sensitive to the potential that only 100 late-hunt permits may be issued in 2006 as this will create a significant loss to the economy of the Gardiner area.

However, there are several points that should be made in reference to the debits and credits of wolf-based economy. First, the decline in the elk population is a product of three processes: extreme drought, excessive hunting removal of female elk, and predation by carnivores including wolves. Significantly, the decline in elk numbers is ecosystem-wide and not just at the northern end of the GYE where most wolves reside. Only a small portion of the decline can be attributed to wolves and much of the decline derives from the severe drought that Montana and the GYE is experiencing.

For the local community, the increase of wolf-based tourism has more than financially offset the decline in hunting revenues to outfitters that can be attributed to wolves. Wolf-based dollars are spread across a wider segment of the local economy (at least 26 outfitters compared to about eight local late-hunt outfitters) than that derived from hunting. Wolf-based income exceeds that of hunting-based operations. Wolf-based income occurs during the entire year supplementing many local entrepreneurs during the financially lean off-seasons.

The local economy MUST NOT play one outfitter off against another, but should seek ways to ensure all outfitters complement each other in their operations and to have all outfitters benefit from the influx of wolf-based income. For example, local teachers and instructors would be happy to provide wolf education and materials for all outfitters. Hunting outfitters could capitalize on the role of the wolf by supplementing their trips with the added experience of seeing and learning about wolves.

Please note that my survey did not include the additional wolf restoration economics from wolves restored to western Montana and Idaho.

Fourth, wolves are more than economics. Wolves provide an image to the world that wilderness remains. With wolves present, Montana is more than a state - it is wilderness. That wilderness brings people from throughout the world BECAUSE Montana is wilderness where wolves howl! Even if wolves are neither seen nor heard, knowing wolves are present in Montana brings an influx of new people and dollars to Montana.

My survey and this letter represent information that is not getting out to the citizens of our great state. The positive boost to the Montana economy should be shared and I call on Montana public servants to acknowledge the importance of wolf-based programs for their benefit to Montana citizens and to the state economy. It is up to you, a Montana Public Servant, to devise mechanisms to increase benefits derived from the presence of wolves in Montana. It behooves the state to cultivate wolf-based tourism and to find ways for all outfitters to work together and benefit from wolf-based economic incentives. The State needs to parlay the presence of wolves to provide the greatest economic benefit possible for all its citizens!

Respectfully yours,

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P.S. This letter and information will be released to the news media in the near future.

Attached:

List of Wolf-based programs

Bibliography: Wolf Books in reference to the Yellowstone Restoration Project

CC/

Susan Lewis, Superintendent, Yellowstone National Park

Ed Bangs, U.S. Fish and Wildlife Service

Doug Smith, Wolf Project, Yellowstone National Park

Pat Cole, Yellowstone Association Institute

Jeff Hagener, Director, Montana Fish Wildlife and Parks

Kurt Alt, Montana Fish Wildlife and Parks,

All Outfitter Organizations that provided information

Defenders of Wildlife

Other interested parties

## **Outfitters providing programs emphasizing wolves in the year 2005**

A Naturalist's World  
Dee Isabelle - Japan  
Elder Hostel  
Elli Radinger - German  
Environmental Adventure Company, LLC  
Expedition Yellowstone  
Fisher Outdoor Discovery  
Greater Yellowstone Coalition  
Jackson Hole Alliance  
MacDonald's Wildlife Photography  
Natural Habitats  
Off the Beaten Path  
Safari Yellowstone  
Sandra Nykerk  
Teton Science School  
Tom Murphy Photography Expeditions  
Van Os Photo Safari  
Westone Images  
Wildlife Expatiations  
Yellowstone Tour Guides: Bozeman & West Yellowstone  
Yellowstone Alpen Guides  
Yellowstone Country Adventures  
Yellowstone Association  
Yellowstone Safari Company  
Yellowstone Adventures  
Yellowstone Year Around  
Yellowstone Outdoor Adventures

## **Outfitters possibly providing programs emphasizing wolves in the year 2005**

Karst Stage - no information available, may not run programs of any sort  
Xanterra Bus - provides day trips  
Phillip - Morris - provides viewing trips but no information available

## **Partial list of organizations bring groups through local outfitters**

National Geographic  
Defenders of Wildlife  
International Wolf Center  
Kuwahara Wolf Nature School  
Chiba High School  
New Start Program  
Bozeman Adult Education  
Rocky Mountain College  
National Wildlife Federation  
Smithsonian National Zoo  
Audubon  
Philadelphia Zoo  
Toledo Zoo  
Wildlife Conservation Society  
Western North Carolina Nature Center (Asheville)  
Wilson College  
Audubon State - New Hampshire  
Saint Louis Zoo  
Sierra Club

**Bibliography**  
**Wolf Books**  
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Worland, WY.
- Smith, D. And G. Ferguson. 2005. **Decade of the Wolf: Restoring the Wild to  
Yellowstone**. Lyons Press, Globe Pequot Press, Guilford, CT.