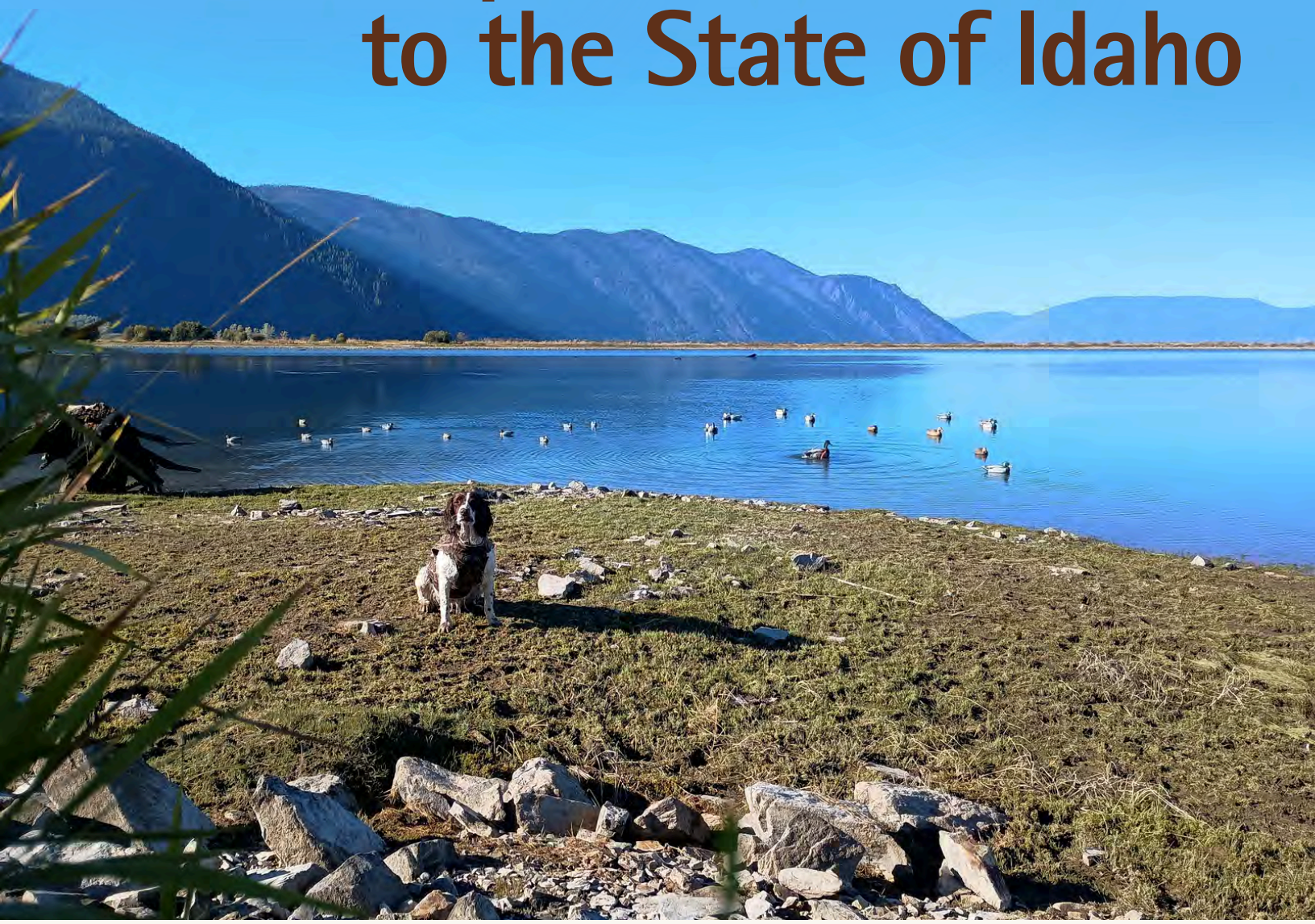
2026 Economic Assessment

On Proposals to Transfer Ownership of Federal Lands to the State of Idaho



Prepared by ***Peterson and Associates*** *for:*

BACKCOUNTRY HUNTERS & ANGLERS

IDAHO BUSINESS FOR THE OUTDOORS

IOGA
Idaho Outfitters & Guides Association

IDAHO WILDLIFE FEDERATION

Goals, Caveats, and Limitations of the Study

The goal of this study is to identify and quantify (where possible) the economic consequences of losing the federal dollars allocated to Idaho for federal land management.

Suggested benefits of such transfers are often promoted in public discourse, but there has been significantly less discussion of their potential costs. *This study does not take a position on the transfer of public lands to state ownership.* Its goal is to identify the likely costs of such transfers to Idaho taxpayers, the outdoor recreation industry, tourism, and Idaho citizens whose access to public lands has been embedded in their way of life for generations. The scenario under consideration measures the potential losses to the State of Idaho and other stakeholders from the transfer of ownership if the public lands were maintained in their current use. If ownership were to be transferred, public land-use would likely change to generate the revenues needed to cover costs currently funded by the federal government. This could include adding or increasing fees for public use, increasing production (e.g., logging), private land sales, or altering land use. That analysis is for a future study, and a change in land use could have ambiguous, significant effects on Idaho public land users.

This study is heavily dependent on input data from a variety of federal sources. These inputs are not always consistent or fully up to date, and some exhibit a wide margin of error. This initial analysis is based on preliminary data and will be updated as new data becomes available. This study should be viewed as a preliminary (Phase I) study and will be updated in late 2026 as more data become available (Phase II).

The results and findings of this study are those of the authors and do not necessarily reflect the opinions or positions of any associated organizations or individuals.

Acknowledgments

We want to thank **Dre Arman**, *BHA Regional Stewardship & Habitat Connectivity Manager*, for her project leadership, and help in securing data. We would also like to thank **Devin O'Dea**, *BHA Western Policy & Conservation Manager*, for his assistance. Additional thanks to the **Advisory Committee**, including **Idaho Business for the Outdoors**, **Idaho Outfitters & Guides Association** and **Idaho Wildlife Federation**. Several other individuals and organizations were also helpful – we would like to acknowledge their assistance.

Cover photo courtesy of Melissa Hendrickson.

Study Sponsors and Authors

The study was sponsored by Backcountry Hunters & Anglers in partnership with Idaho Business for the Outdoors, Idaho Outfitters & Guides Association, and Idaho Wildlife Federation.

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The study was initiated in July 2025 and completed in March 2026.

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Key Takeaways

The study was sponsored by Backcountry Hunters & Anglers, Idaho Business for the Outdoors, Idaho Outfitters & Guides Association, and Idaho Wildlife Federation, published in March 2026. Authors include Steven Peterson, Timothy Nadreau, and Stephen Pool.

The goal of this study is to identify the likely costs of federal land transfers to the State of Idaho. This study does not take a position on the transfer of public lands to state ownership. It examines the potential implications for Idaho taxpayers, the outdoor recreation industry, tourism, and Idaho citizens whose access to public lands has been integral to their way of life for generations.

- Two scenarios were conducted: 1) Base Case (reported here) and 2) A lower-bound estimation included in the main report.
- **Estimated average annual direct USFS, BLM, and PILT / SRS expenditures were $837.7 million, which would likely be shifted onto the state taxpayers in a land transfer**.
- Factoring in the multiplier effects, **the reduction in economic activity from the loss of these direct expenditures includes: $954 million in gross state product; $641 million in total compensation (Payroll / Benefits); 7,491 jobs; $92.8 million in state and local taxes.**

- The magnitude of the potential exposure to Idaho's taxpayers is evident in comparison with Idaho's General Fund, which in FY 2024 was $5.4 billion. **The base-case potential funding shortfall represents about 15.6% of the General Fund revenues ($837.7 million/$5.4 billion).** In addition, the state could lose $92.8 million in tax revenue from federal agency spending. The lower-case scenario accounts for approximately 9.3% of the General Fund ($500 million of $5.4 billion).
- **This report assumes that public- and private-sector outputs would remain the same under potential state ownership as under current federal ownership.** If the change in ownership were to occur, public land use would almost certainly change to generate the revenues needed to cover the costs now funded by the federal government.
- The flow of economic production from Idaho's natural resource-based industries is considerable and could have a profound impact (either negative or positive) on these industries.
    - Estimated total jobs of agribusiness, forestry and wood products, mining, and visitor tourism are 244,175, or about 25% of Idaho's total employment.
        - Total tourism and recreation jobs (a subset) are estimated at 76,470 jobs.
- **The effects of land transfers could have long-term implications for the entire economy, as most Idaho families and businesses have direct or indirect ties to outdoor recreation activities.**

Executive Summary

Introduction and Goals of the Study

The goal of this study is to identify the likely costs of federal land transfers to the State of Idaho. This study does not take a position on the transfer of ownership of federal public lands to state ownership. It examines the potential implications for Idaho taxpayers, the outdoor recreation industry, tourism, and Idaho citizens whose access to public lands has been integral to their way of life for generations. The results of this study (Phase 1) are considered preliminary due to some data limitations, and Phase II of the report will be released later in 2026 with more complete data.

Study Scenarios

The scenarios under consideration estimate the potential costs to the State of Idaho and other stakeholders from transferring ownership to the State of Idaho if the federal public lands were maintained in their current use. If the change in ownership were to occur, public land use would almost certainly change to generate the revenues needed to cover the costs now funded by the federal government. It is also possible, from the law of unintended consequences, that some of the federal lands transferred to the State of Idaho could be privatized in the future. This possibility needs to be examined and evaluated carefully. Privatization has occurred with Idaho State Endowment lands under certain conditions.[i]

Two scenarios were studied: a Base Case and a Lower-Bound case.

Base Case Scenario

Table E1 shows the estimated direct agency expenditures for the base case scenario. The analysis includes operations of the U.S. Forest Service (USFS), which spends an estimated $570 million annually; the Bureau of Land Management (BLM), which pays $222 million annually; and includes another $46 million in annual expenditures from Payments-in-lieu-of-taxes (PILT) plus Secure Rural Schools (SRS) spending. These federal expenditures represent direct Idaho spending or injections into the economy. They would likely have to be replaced by Idaho taxpayers if a land transfer were to occur. Other federal agencies that also play a vital role in Idaho include the U.S. Army Corps of Engineers and the U.S. Bureau of Reclamation, which are noted in the report but not included in the numeric analysis.

Table E1: Direct Estimated Annual Federal Agency Expenditures, FY 2023-2024

Federal Agency	Direct Expenditures
USFS	$570 million
BLM	$222 million
PILT and SRS	$46 million
Total	**$838 million**

Sources: USFS, BLM, Author's Calculations and Others[1]

Due to data uncertainty at the time of Phase I of this study, a lower-bound scenario was also conducted, using direct federal agency expenditures of $500 million annually, approximately 60% of the base case. It is assumed that, upon transfer of ownership, the federal funds supporting the agencies would cease.

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[1] *The USFS and BLM data were obtained from various sources, including the federal agency sources and study partners with internal communications. These numbers are deemed to be accurate but not guaranteed. They are estimates. A formal data request has been issued (i.e., FOIA), which was unavailable at the time of Phase I of this study.*

The Magnitude of Idaho's Potential Fiscal Losses

To put the magnitude of the potential fiscal liability of the land transfers into perspective, the direct federal expenditures are compared to Idaho's General Fund FY 2024, which totaled $5.4 billion. **The base-case potential funding shortfall represents about 15.6% of the General Fund revenues ($837.7 million/$5.4 billion).** The lower-case scenario accounts for approximately 9.3% of the General Fund ($500 million of $5.4 billion).

Two Idaho IMPLAN scenarios were employed to estimate total contributions, including the multiplier effects.[2] The first scenario modeled agency spending from federal government operations (64%-72% of the total), depending on the agency. The second scenario modeled field expenditures and fire suppression efforts and accounted for approximately 28%-36% of the total.

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[2] *Direct contributions represent the actual expenditures and jobs of federal agency operations and are the inputs into the economic IMPLAN models. Total contributions include the multiplier effects and represent the outputs. Multipliers measure the ripple effects of direct agency spending, which occurs in two forms: 1) The indirect effects from the backward linkages of federal agency spending on goods and services throughout the economy. 2) Induced effects from agency employee spending on goods and services. Together, they create ripple effects that amplify the direct agency spending in the economy.*

The federal contributions are reported in Table E2. The first column reports Gross State Product (GSP). Total compensation (i.e., labor income) consists of wages, benefits, and proprietor income and is a subset of GSP (output).

Total USFS contributions are $623.3 million in GSP and 4,405 jobs. Total BLM contributions are $268.2 million in GSP and 2,439 jobs. Payment-in-lieu-of-taxes (PILT) and Secure Rural Schools (SRS) payments create $62.5 million in GSP and 647 jobs.

Grand Total: A reduction in federal agency dollars would result in a loss of $954.0 million in Gross State Product[3], $641.4 million in total compensation, and 7,491 jobs, including the multiplier effects. This represents a reduction of Idaho's economy if federal dollar agency inflows and related expenditures were to cease upon transfer to state ownership.

Table E2: Base Case Economic Contributions from Federal Agency Spending, Including the Multiplier Effects, 2024

Federal Agency	Gross State Product	Total Compensation	Total Jobs
Forest Service	$623,286,621	$395,437,959	4,405
BLM	$268,197,728	$200,833,088	2,439
PILT and SRS	$62,474,658	$45,080,312	647
Total	**$953,959,006**	**$641,351,358**	**7,491**

Source: IMPLAN and Authors' Calculations.

[3] *The total reduction in output (sales) is $1.23 billion, which is a gross measure of contributions. Gross state product (GSP) is a net measure (i.e., a more accurate measure of contributions) and a subset of output (sales).*

The economic activity generated by federal agency expenditure creates an annual flow of tax revenues, as shown in Table E3. Property tax contributions are $20.3 million, and sales and excise taxes are $50.1 million. Income taxes total $22.4 million, bringing the total to $93.8 million in state and local taxes, including multiplier effects. The jobs' impacts are equivalent in magnitude to the total employment of a typical rural Idaho county, such as Idaho County (5,677 jobs) or Shoshone County (5,452 jobs).

Table E3: State and Local Tax Contributions from Federal Agency Spending, 2024

Tax Contributions	Taxes Foregone
Property (Local)	$20,326,293
Sales/Excise	$50,093,932
Income	$22,422,724
Total	**$92,842,949**

Source: IMPLAN and Authors' Calculations.

Given the supply chain effects of these operations in Idaho, **if the state were to take over the federal lands and operate them according to the status quo, between $500 million and $837.7 million of Idaho state spending will be needed to replace the federal dollars currently coming in.** Factoring in the multipliers, when accounting for this reduction of financial injections to the state, may mean a loss of between $577.4 million and $953.9 million in Idaho's gross state product. The likely scenario to recover these losses would be to increase Idaho's "federal land" outputs by the amount currently coming from the federal government.

Geography and Landscape of Idaho and the Role of Federal Lands

Idaho is the 14th-largest state in the United States, with an area of 83,569 square miles. It has 52,933,120 acres, of which 32,789,648 acres (about 62%) are owned by the federal government. With 24 people per square mile, Idaho ranks 44th among the 50 states in population density.[ii] The state has vast forest resources, wilderness areas, and extensive high-desert regions. Idaho ranks 5th in the U.S. in acres owned by the federal government and 3rd in the percentage of federal land ownership, behind only Nevada (80.10%) and Utah (63.10%).

Idaho has about 20.5 million acres managed by the U.S. Forest Service, ranking 3rd in the U.S. behind Alaska and California. Idaho has approximately 11.8 million acres managed by the Bureau of Land Management, ranking 9th nationally. Idaho has approximately 510,000 acres managed by the National Park Service (NPS), approximately 50,000 acres managed by the U.S. Fish and Wildlife Service (USFWS), and approximately 3,100 acres managed by the Department of Defense (DOD).

Economic Connections of Idaho Industry to Public Lands

This report assumes that public- and private-sector outputs would remain the same under potential state ownership as under current federal ownership. The flow of economic production from these industries is considerable and thus worth noting. Changes in resource management could have a profound impact (either negative or positive) on these respective industries. Table E4 presents the total jobs (including multiplier effects) for Idaho's agribusiness, forestry and wood products, mining, and tourism and visitors. Total jobs were 244,175, or about 25% of Idaho's total employment in 2023 (971,396 jobs).[iii]

Table E4: Total Job Contributions by Industry Including the Multiplier Effects, 2024

Industry	Total Jobs
Agribusiness	126,800
Forestry and Wood Products	28,890
Mining	12,015
Tourism and Visitors	76,470
Total Jobs	**244,175**

Sources: Watson, P. (2023), G. Latta (2023), Peterson, S. (2025), DRA (2023), and Authors' Calculations.

Services Provided to Idaho Stakeholders by the Federal Public Lands and Resources

Public lands in Idaho provide a wide range of economic services to both urban and rural residents, local communities, historic natural resource-based industries, newly emerging industries that support the new economy, recreation, and tourism. These services include:

- Way of life. Any Idaho resident, regardless of where they live in the state, is within 20 minutes of being in a pristine outdoor environment. Even residents of the Treasure Valley and other urbanized areas of Idaho are close to the outdoors, and their lives typically revolve around outdoor activities.
- Fast-growing economy. Idaho's way of life has been attracting high-quality companies, firms, and employees over the last decade, making it one of the fastest-growing states in the nation, and this trend will likely continue into the next decade.
- Recreation and Tourism. A significant share of Idaho's outdoor recreation economy is directly tied to access to federal lands. They include:
    - Hiking, backpacking, and camping
    - Hunting
    - Fishing
    - Float and Power Boating
    - Skiing and snowboarding
    - Snowmobiling
    - Bicycling
    - Off-highway vehicle recreation
    - National Park preserves, monuments, and trails
- Grazing

- Irrigated Agriculture
- Forest products
- Mining and Minerals
- Anadromous Fisheries
- Watershed and Ecosystem Services

Civic Involvement and Public Dialogue

An important consideration in land transfers is the need to involve Idaho stakeholders. Recent polling indicates that Idaho taxpayers extensively use and support public land access. Given the potential profound impacts on Idaho, it is important that thorough dialogue and discussion occur before land transfers are considered. For example, a recent poll found[iv] that 90% of Idahoans used public lands. Approximately 83% of Idahoans polled say issues of wildlife, clean water, and public lands are as important as other issues, such as the economy, health care, and education, when deciding whether to support an elected public official.


Bonners Ferry
Libby
Whitefish
Kalispell
Sandpoint
Cut Bank
Shelby
Conrad
Choteau
Great Falls
Coeur d'Alene
Polson
Saint Maries
Missoula
Helena
Orofino
Deer Lodge
Hamilton
Grangeville
Butte
Bozer
Salmon
Dillon
IDAHO
Weiser
Ontario
Emmett
Boise
Ketchum
Hailey
St. Anthony
Rexburg
Idaho Falls
Blackfoot
Mountain Home
Gooding
Pocatello
Soda Springs
Twin Falls
Burley
Preston

Source: USGS

Source: Idaho / Bureau of Land Management

Main Report

Overview of Study

Federal Land Ownership in Idaho

Idaho is the 14th-largest state in the United States, with an area of 83,569 square miles. It has 52,933,120 acres, of which 32,789,648 acres (about 62%) are owned by the federal government. With 24 people per square mile, Idaho ranks 44th among the 50 states in population density.[v] The state has vast forest resources, wilderness areas, and extensive high-desert regions. The Rocky Mountains span most of the state, including the Bitterroot Mountains, the Greater Yellowstone Mountains, and the Lost River Range (Figure 1).

Idaho ranks 5th in the U.S. in acres owned by the federal government and 3rd in the percentage of federal land ownership, behind only Nevada (80.10%) and Utah (63.10%) (Table 1).[vi]

Table 1: Federal Land Ownership, 2018

Rank	State	Federal Acreage	Total Acreage	Percent of Acreage
1	Alaska	222,666,580	365,481,600	60.90%
2	Nevada	56,262,610	70,264,320	80.10%
3	California	45,493,133	100,206,720	45.40%
4	Utah	33,267,621	52,696,960	63.10%
5	**Idaho**	**32,789,648**	**52,933,120**	**61.90%**
6	Oregon	32,244,257	61,598,720	52.30%
7	Wyoming	29,137,722	62,343,040	46.70%
8	Arizona	28,077,992	72,688,000	38.60%
9	Montana	27,082,401	93,271,040	29.00%
10	New Mexico	24,665,774	77,766,400	31.70%

Source: Congressional Research Service.

Idaho has about 20.5 million acres managed by the U.S. Forest Service (USFS), ranking 3rd in the U.S. behind Alaska and California. Idaho has about 11.8 million acres managed by the Bureau of Land Management (BLM), ranking 9th in the U.S. Idaho has about 510 thousand acres managed by the National Park Service (NPS), about 50 thousand acres managed by the U.S. Fish and Wildlife Service (USFWS), and about 3.1 thousand acres for the Department of Defense (DOD) (Table 2).

Table 2: Idaho Federal Land Ownership by Agency, 2018

Federal Agency	Acres Owned
Forest Service	20,447,859
Bureau of Land Management	11,776,995
National Park Service	511,963
Fish and Wildlife Service	49,733
Department of Defense	3,098

Source: Congressional Research Service

Services Provided to Idaho Stakeholders by the Federal Public Lands and Resources

Public lands in Idaho provide a wide range of economic services to both urban and rural residents, local communities, historic natural resource-based industries, newly emerging industries that support the new economy, recreation, and tourism. These services include:

Way of life. Any Idaho resident, regardless of where they live in the state, is within 20 minutes of being in a pristine outdoor environment. Even residents of the Treasure Valley and other urbanized areas of Idaho are close to the outdoors, and their lives typically revolve around outdoor activities. A 2022 survey conducted for the Idaho Department of Parks and Recreation (IDPR)[vii] found:

- Over 90% of respondents find recreation important to the economies of both their community and the state of Idaho.
- Most people recreate locally, sometimes traveling to nearby regions.

The Idaho Wildlife Federation found in a separate 2022 poll[iv]:

- 90% of Idahoans polled used public lands.
- 83% of Idahoans polled say issues of wildlife, clean water, and public lands are as important as other issues like the economy, health care, and education, when supporting an elected public official.

These surveys quantify what most residents already know. For example, a simple discussion with colleagues or community members will usually yield results similar to those from formal surveys.

Fast-growing economy. Idaho's way of life has been attracting high-quality companies, firms, and employees over the last decade, making it one of the fastest-growing states in the nation, and this trend will likely continue into the next decade. Idaho's population has been growing rapidly since 1990, ranking among the top five fastest-growing states annually, interrupted only occasionally by recessions.

Recreation and Tourism. A significant share of Idaho's outdoor recreation economy is directly tied to access to federal lands. They include:

- Hiking, backpacking, and camping
- Hunting
- Fishing
- Power Boating
- Skiing and snowboarding
- Snowmobiling
- Bicycling
- Off-highway vehicle recreation
- National Park preserves, monuments, and trails

These industries support both resident recreation services and an important tourism and outdoor recreation industry.

Grazing. Irrigated Agriculture; Forest products; Mining and Minerals; Anadromous Fisheries; Watershed and Ecosystem Services.

Irrigated Agriculture. Irrigated agriculture is heavily dependent on the water resources that are owned or managed by the Bureau of Reclamation and the U.S. Army Corps of Engineers. Without irrigation, much of Southern Idaho would be a desert. A significant amount of the water itself originates from public lands.

Forest products. The National Forests in Idaho contribute to forest products output through timber sales, which support logging, milling, transportation, paper production, and wood products manufacturing.

Mining and Minerals. Federal lands in Idaho support the extraction of minerals, including both metallic and non-metallic mining. They include gold and silver mining, molybdenum, antimony, sand and gravel, crushed stone, phosphate, limestone, and other industrial minerals. These materials are critical inputs for transportation infrastructure, building construction, fertilizer production, and local public works projects.

Anadromous Fisheries. The U.S. Army Corps of Engineers manages the four Lower Snake River Dams[4]: Lower Granite, Little Goose, Lower Monumental, and Ice Harbor; and Dworshak (Clearwater River) and Albeni Falls (Lake Pend Oreille). Lucky Peak Dam, located on the Boise River, is owned by the U.S. and operated by the Bureau of Reclamation as part of the Boise Project. Anadromous fish in Idaho include:

- Steelhead (Oncorhynchus mykiss), an ocean-going rainbow trout.
- Chinook Salmon (Oncorhynchus tshawytscha), common in spring/summer and fall runs.
- Sockeye Salmon (Oncorhynchus nerka).
- Coho Salmon (Oncorhynchus kisutch).
- Pacific Lamprey, a lesser-harvested but migratory species.

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[4] *Although the four Lower Snake River Dams are technically in Washington State near the Idaho border, they directly impact the Idaho fisheries and water navigation to Lewiston, Idaho.*

In 2025, 301,179 adult fish were counted at Lower Granite Dam situated in the Lower Snake River (Table 3).

Table 3: Adult Returning Fish Lower Granite Dam, 2025

Fish Species	Fish Headcount
Chinook	81,659
Jack Chinook	14,250
Steelhead	82,170
Wild Steelhead	23,353
Sockeye	1,106
Coho	9,042
Jack Coho	330
Shad	87,423
Lamprey (daytime)	303
Lamprey (Nighttime)	1,540
Lamprey (LPS)	-
Bull Trout	2
Chum	-
Pink	1
Total	**301,179**

Source: Columbia River DART Results, Columbia Basin Research.

Watershed and Ecosystem Services. Federal lands provide critical watershed protection, water-quality benefits, carbon storage, wildlife habitat, and flood-mitigation services. While these services are often not directly priced in markets, their implicit value is substantial.

Federal Lands: Federal Investment—Federal Costs, and Private Benefits to Idaho Stakeholders

A key feature of economic services provided by federal lands is the dichotomy between who pays and who benefits. The federal government primarily bears the costs of managing federal lands through agency operational expenditures.

- Land and water management
  - Grazing
  - Logging and wood products
  - Fisheries
- Wildfire suppression
- Disaster preparedness and management
- Road building and maintenance
- Capital infrastructure
- Habitat restoration
- Recreation infrastructure

Because the federal government carries these costs, private Idaho stakeholders can reap a number of subsidized benefits, including:

- Agriculture—Animal Production
- Agriculture Processing (Food Processing)
- Logging and Wood Products
- Paper Manufacturing

- Water Transportation (Port of Lewiston)
- Tourism Sectors
- Recreation Sectors
- Fisheries.

This structure effectively represents a public investment that underwrites private economic activity across multiple sectors within Idaho's economy. Additionally, because federal lands are exempt from local property taxation, the federal government provides compensatory payments to local governments, most notably through the Payments in Lieu of Taxes (PILT) and Secure Rural Schools (SRS) programs. These payments help offset forgone tax revenues while supporting county services, including roads, schools, and emergency services. **Taken together, Idaho's federal lands provide substantial economic, environmental, and social value to Idaho. These benefits are supported by a management framework in which land stewardship costs, infrastructure investment, and risk exposure are borne mainly at the federal level. At the same time, economic activity flows primarily to private Idaho businesses and local communities.**

Proposals to transfer federal lands to state ownership would fundamentally alter this balance. Such a shift would not necessarily change the underlying landscapes or their productive capacity. It would reassign responsibility for land management, fiscal risk, and long-term stewardship from federal agencies to the State of Idaho or to Idaho businesses, industries, and individuals. Understanding this change is therefore essential to evaluating the fiscal, economic, and policy implications of the federal land transfer proposal.

The federal government is the "deep pocket" in managing these resources. If a land transfer were to occur, the State of Idaho's taxpayers would need to be prepared to take on those risks.

It should also be noted that, **for all federal spending and taxes, Idaho receives $13,014 in federal funds (per-capita) and pays $8,952 in taxes, resulting in a per-capita deficit of $4,062**.[viii] Idaho communities and stakeholders have a symbiotic relationship with federal programs.

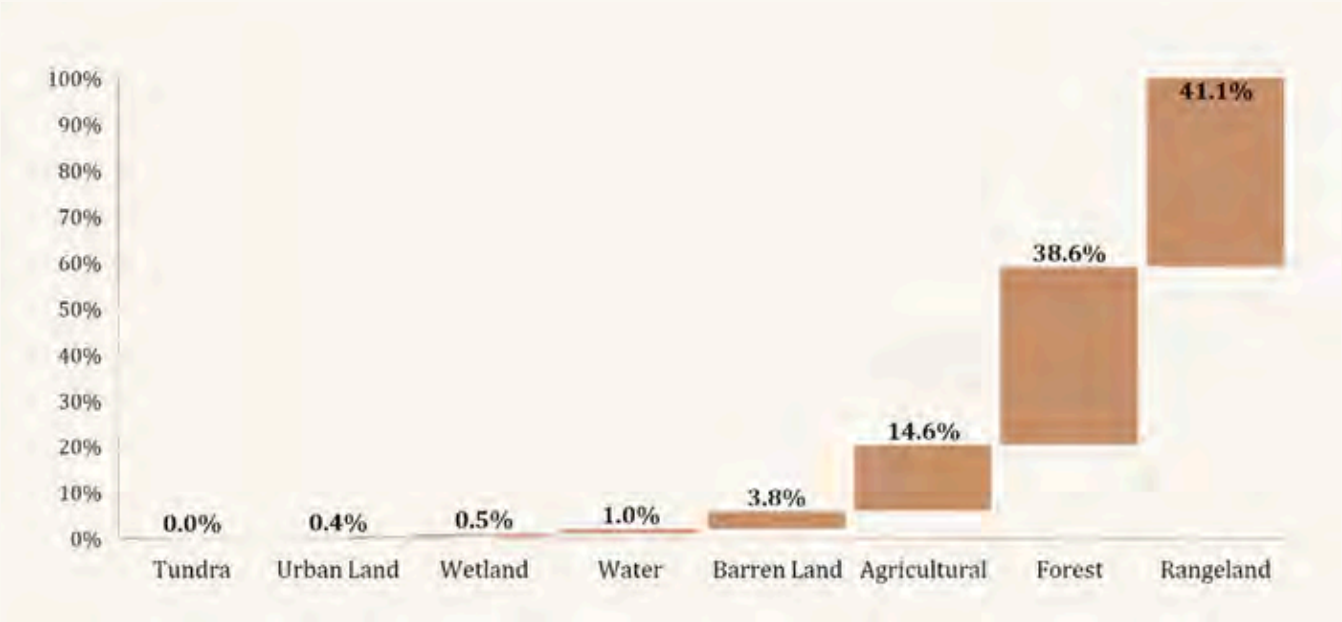
Key Assumption of the Study

The key assumption of this study is that the flow of economic services and output would remain the same. The entity responsible for the costs and the financial and economic risk is being transferred from the federal government to the State of Idaho. If the transfer negatively alters the use of the land resources and economic output, the losses to Idaho's economy would be an order of magnitude greater than these results. Subject to data availability, the economic output of these services and resources will also be reported.

Federal Agencies Operating in ID

Approximately[5] 41.1% of Idaho's land is composed of rangeland, 38.6% forest land, 14.6% in agriculture production, 3.8% barren land, 1.0% water, 0.5% wetlands, and 0.4% in urban uses[ix] (Figure 2).

Figure 2: Land Uses in Idaho



Source: County (Idaho) Profiles, and Idaho at a Glance, McClure Center.

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[5] *Land use types are overlapping (i.e., forest land and grazing, for example), creating a variance between estimations. The reported percentages are therefore approximations.*

The U.S. Forest Service manages about 20,401,381 acres of forest land in Idaho, out of a total of 53,443,245 acres (about 38% of the state). (Figure 3). Overall, forest land comprises about 38.6% of Idaho's land.

Figure 3: Idaho Forests

The *Idaho State Map* published by GISGeography provides a statewide reference overview of Idaho's physical geography and federally managed lands. The map highlights major natural features, population centers, tribal lands, and extensive federal landholdings across the state.

Federal land management and installations shown on the map include:

- U.S. Forest Service – National forests and forest system lands.
- Bureau of Land Management – Public lands, grazing areas, and mineral management lands.
- National Park Service – National parks, monuments, and protected areas.
- U.S. Fish and Wildlife Service – National wildlife refuges and conservation areas.
- U.S. Department of Defense – Military installations and training ranges.

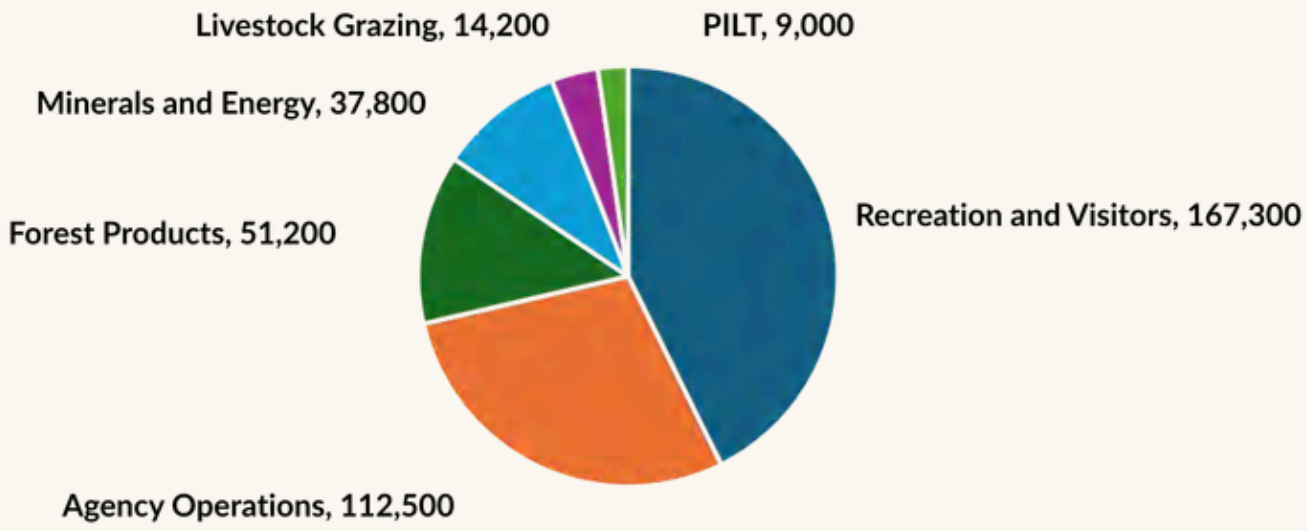
U.S. Forest Service – Nationwide Reach

The U.S. Forest Service (USFS) manages 193.2 million acres in the U.S., of which 188.5 million are forests, along with 3.8 million acres of grasslands, and 770 thousand acres of other lands.[x]

USFS National Economic Contributions

The flow of economic services, including agency operations in 2023, supported $45.0 billion in Gross Domestic Product (GDP), and 392,000 jobs in the U.S. economy (including the multiplier effects). Approximately 43% of the contributions are from recreation and tourism, 29% from agency operations, 13% from Forest Products, 10% from minerals and energy, 3% from livestock grazing, and 2% from payments-in-lieu-of-taxes payments (Figure 4). Recreation and visitor tourism are the most important outputs from the U.S. National Forests.

Figure 4: U.S. Forest Service Jobs Contributions (Including the Multiplier Effects), 2023



U.S. Forest Service Operations in Idaho

Table 4 and Figure 5 present U.S. Forest Service acres by forest in Idaho.[xi]

Table 4: Forest Service Idaho Land Holdings by Forest, 2023

National Forests	NFS Acres	Other	Total Acres
Bitterroot*	467,536	243	467,778
Boise	2,647,890	302,944	2,950,834
Cache*	263,738	479	264,216
Caribou*	971,045	94,669	1,065,713
Challis	2,455,073	24,661	2,479,735
Clearwater	1,682,174	43,241	1,725,415
Coeur d'Alene	727,111	80,741	807,852
Kaniksu*	902,505	213,042	1,115,547
Kootenai*	46,624	20	46,644
Nezperce	2,223,581	28,432	2,252,014

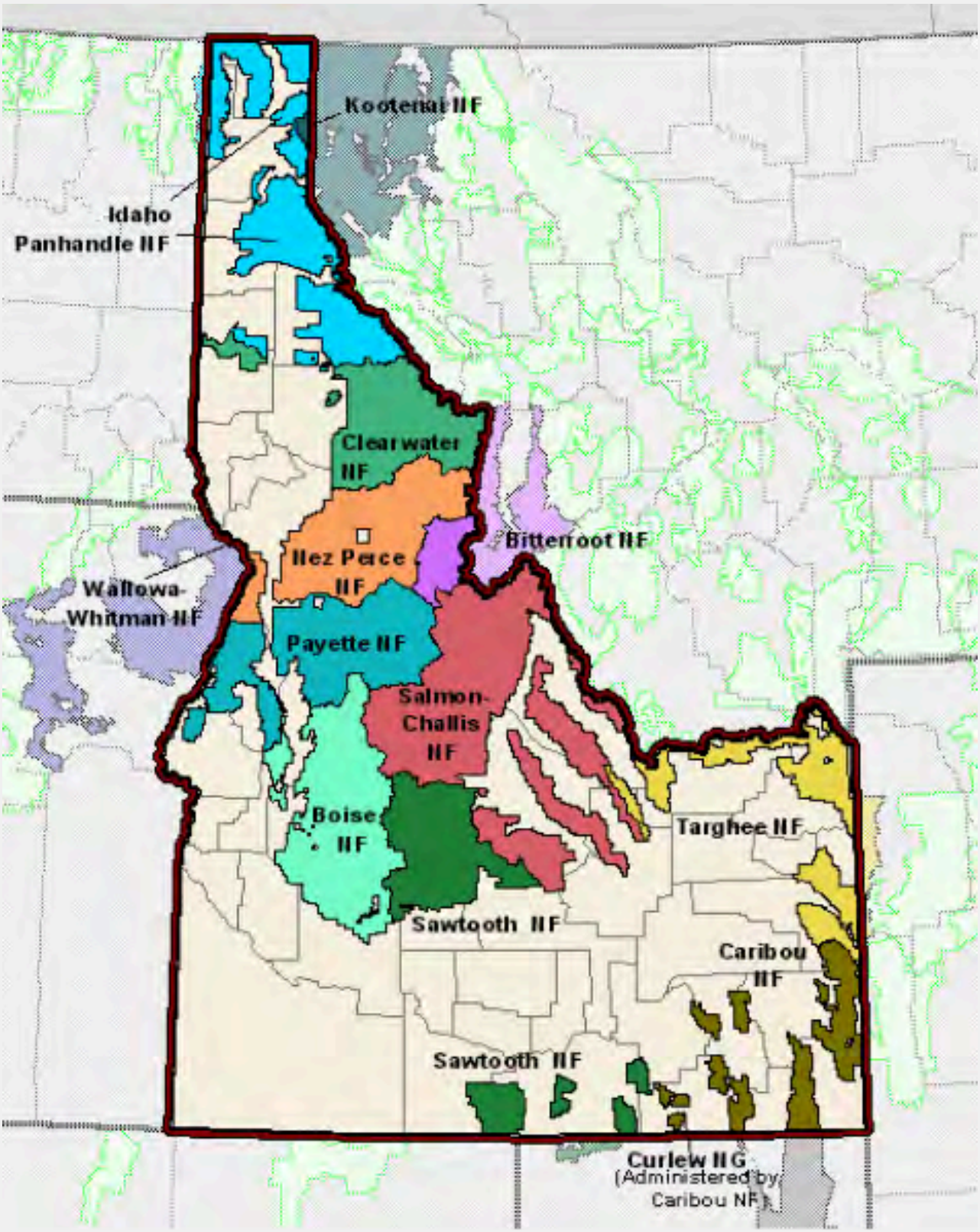
Continued on next page

Table 4: Forest Service Idaho Land Holdings by Forest, 2023 (cont'd)

National Forests	NFS Acres	Other	Total Acres
Payette	2,327,367	98,622	2,425,988
Salmon	1,774,188	22,683	1,796,871
Sawtooth*	1,731,206	69,370	1,800,576
St. Joe	867,995	208,899	1,076,894
Targhee*	1,308,727	49,161	1,357,889
Wallowa*	4,620	0	4,620
Sub-Total	*20,401,381*	*1,237,206*	*21,638,587*
Grassland / Other	47,540	27,243	74,784
Purchase Unit Total	363	0	363
Grand Total	**20,449,284**	**1,264,450**	**21,713,734**

*Net Acres in Idaho. Forest situated in more than one state.
Source: USFS Land Area Report 2023.

Figure 5: Idaho National Forests



Source: U.S. Forest Service. (n.d.). Schedule of proposed actions (SOPA).

Economic Contributions of Idaho Forest Service Lands (USFS Analysis)

The U.S. Forest Service periodically conducts a contribution assessment by forest. The 16 Idaho national forests were aggregated into 10 analyses (or studies), as summarized in Table 5. The Uinta-Wasatch-Cache National Forests are combined into one study, as are the Nez Perce-Clearwater National Forests. The Panhandle National Forest consists of Kaniksu, Coeur d'Alene, and St. Joe National Forests.

The dollar values in Table 5 are adjusted for inflation (2019 to 2025). Some forests consist of land in Montana, Wyoming, or Utah, and those contributions are scaled based on the proportional acreage in Idaho.

Total USFS contributions arise from:

- **Recreation.**
- **U.S. Forest Service agency operations.**
- **Forest products.**
- **Livestock grazing.**
- **Payment-in-lieu-of-taxes.**

The total contributions by the forest are reported in Table 5. USFS Agency operations and recreation are *presented* separately.

There are 3,158 total agency jobs, with $126.7 million in labor income and $150.2 million in Gross State Product. These contributions would likely disappear if the federal lands were transferred to state ownership and management.

Source: Pixels – Kevin Bidwell

Table 5: Economic Agency Contributions from U.S. Forest Service Lands in Idaho, 2019 estimations inflation adjusted to 2025 Dollars [6]

Idaho Total (All Uses)

Idaho Forests / Grasslands	Jobs	Labor Income	GSP
Bitterroot	510	$24,342,300	$32,934,145
Boise	1,400	$6,611,053	$97,583,680
Unita-Wasatch-Cache	392	$17,553,309	$29,629,053
Caribou-Targhee & Curlew	2,431	$122,690,881	$193,521,266
Nez Perce-Clearwater	1,830	$99,236,443	$14,581,156
Idaho Panhandle	1,872	$104,710,491	$156,229,677
Payette National	1,200	$56,301,189	$81,597,297
Salmon-Challis	920	$43,072,775	$60,781,312
Sawtooth	1,670	$70,185,661	$112,530,463
Wallowa-Whitman	2	$98,368	$141,861
Total	**12,227**	**544,802,468**	**$779,529,912**

[6] *The USFS data and results is somewhat dated (2019), and their full report has not published; only the partial results are presented (Table 5 presents their results with dollar amounts adjusted for inflation). The USFS contribution analysis and results will be updated, and greater detail will be added in Phase II of this report.*

Table 5 Economic Agency Contributions from U.S. Forest Service Lands in Idaho (cont'd)

FS Agency Operations

Idaho Forests / Grasslands	Jobs	Labor Income	GSP
Bitterroot	230	$11,440,881	$13,503,000
Boise	476	$2,512,200	$32,202,614
Unita-Wasatch-Cache	3	$159,152	$219,796
Caribou-Targhee & Curlew	315	$19,557,390	$25,064,018
Nez Perce-Clearwater	586	$34,732,755	$4,228,535
Idaho Panhandle	483	$29,680,109	$37,573,610
Payette National	468	$25,335,535	$31,006,973
Salmon-Challis	331	$20,244,204	$24,312,525
Sawtooth	267	$16,142,702	$21,380,788
Wallowa-Whitman	0	$76	$91
Total	3,158	**$126,663,371**	**$150,193,601**

Source: US Forest Service and Authors' Calculations

Table 6 illustrates the contributions of recreation in the federal forests to Idaho's economy, a subset of Table 5 (*Idaho Total (All Uses*)). The U.S. Forest Service estimates the creation of 4,228 jobs, $127.4 million in labor income, and $218.3 million in Gross State Product, including the multiplier effects.

Table 6: Economic Recreation Contributions from U.S. Forest Service Lands in Idaho, 2019 estimations inflation adjusted to 2025 Dollars

Idaho Forests / Grasslands	Jobs	Labor Income	GSP
Bitterroot	168	$5,016,440	$7,831,200
Boise	616	$2,096,000	$34,805,700
Unita-Wasatch-Cache	25	$894,488	$1,548,562
Caribou-Targhee & Curlew	993	$33,909,363	$56,541,812
Nez Perce-Clearwater	311	$11,011,840	$1,849,152
Idaho Panhandle	370	$12,118,842	$21,272,354
Payette National	396	$12,941,250	$21,989,500
Salmon-Challis	313	$16,045,800	$15,416,320
Sawtooth	1,035	$33,378,000	$57,083,520
Wallowa-Whitman	0	$18	$33
Total	**4,228**	**$127,412,041**	**$218,338,153**

Source: US Forest Service and Authors' Calculations.

Bureau of Land Management (BLM)

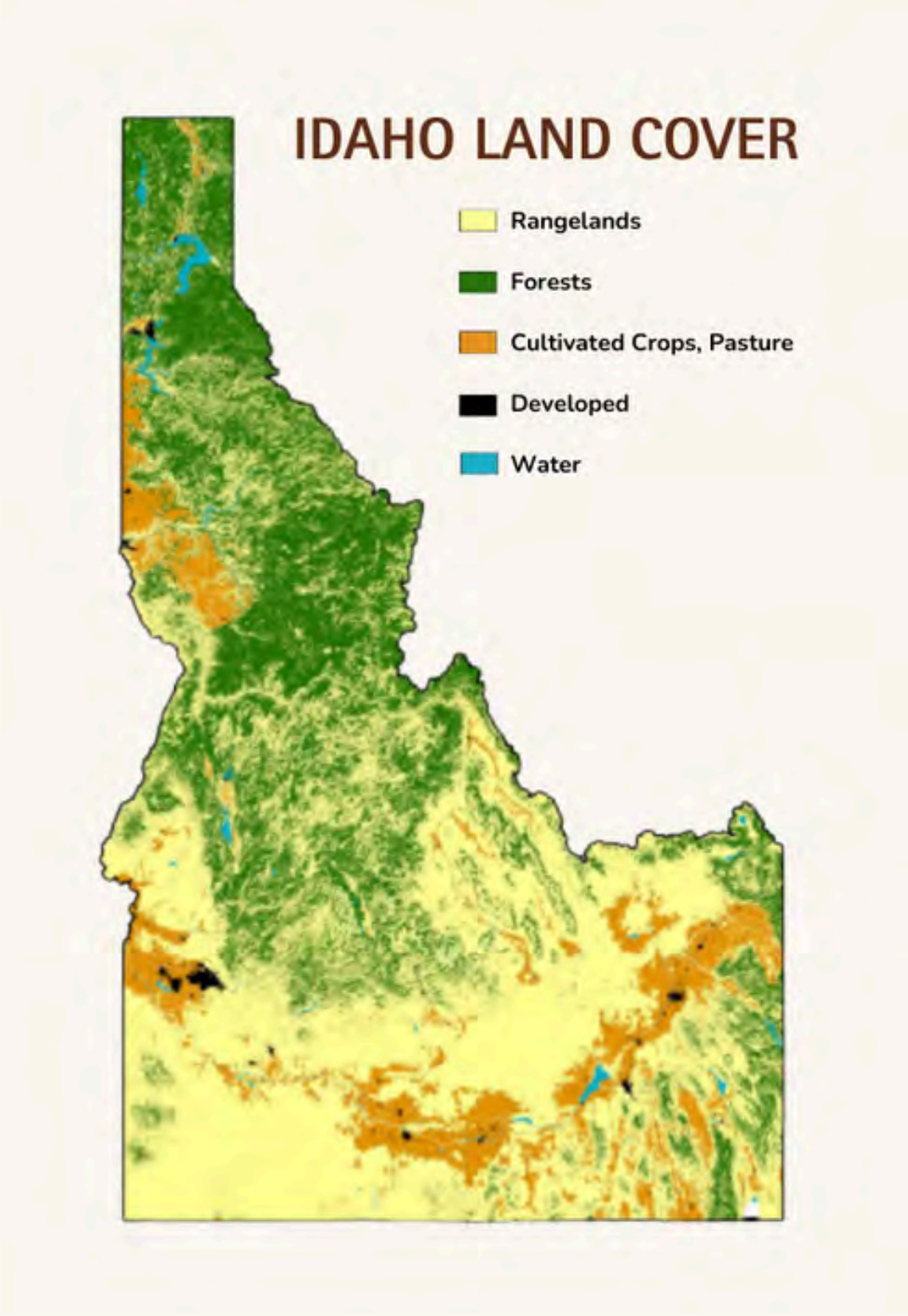
The BLM manages 245 million acres, or one in every 10 acres of land in the United States. It also manages approximately 30 percent of the U.S. mineral production.[xii]

Bureau of Land Management

The BLM, which manages much of Idaho's rangeland (Figure 6), operates with a multiple-use format, including:

- Renewable energy development (solar, wind, other).
- Conventional energy development (oil and gas, coal).
- Livestock grazing.
- Hardrock mining (gold, silver, other).
- Timber harvesting.
- Outdoor recreation (such as camping, hunting, rafting, and off-highway vehicle driving).
- Conservation services.
- Fire management.
- Protecting landscapes including wilderness areas, wilderness study areas, national monuments, national conservation areas, historic trails, and wild and scenic rivers.
- Protecting wild horses and burro rangeland.
- Conserving wildlife, fish, and plant habitat.
- Preserving Native American and "Old West" artifacts.
- Protecting paleontological resources, such as dinosaur bones.

Figure 6: Idaho's Rangelands, 2022



Source: Idaho at a Glance, McClure Center

Idaho has approximately 11.776 million acres managed by the BLM and ranks 9th in the U.S. (Table 7).

Table 7: Top 15 States Ranked in BLM Acreage, 2018

Rank	State	BLM Acres
1	Alaska	71,397,880
2	Nevada	47,298,840
3	Utah	22,787,881
4	Wyoming	17,493,875
5	Oregon	15,742,384
6	California	15,088,090
7	New Mexico	13,500,023
8	Arizona	12,120,512
9	Idaho	11,776,995
10	Colorado	8,352,437
11	Montana	8,022,852
12	Washington	437,342
13	South Dakota	275,336
14	North Dakota	58,032
15	Texas	12,188

Source: Federal Land Ownership: Overview and Data, Library of Congress.

Bureau of Land Management Contributions

The BLM conducts a periodic state-level contribution assessment (Table 8).[xiii]

The BLM reports both direct jobs and total jobs (which includes the multiplier effects). It also reports direct output and total output (which includes the multiplier effects). Total output is the broadest measure of economic contributions.

Table 8: BLM Contributions to Idaho's Economy, 2023

Activity	Direct Jobs	Total Jobs	Direct Output	Total Output (Sales)
Recreation	2,906	4,016	$244 million	$418 million
Nonenergy Minerals	892	1,839	$220 million	$394 million
Grazing	1,572	2,740	$110 million	$264 million
Timber	55	126	$12 million	$21 million
BLM Expenditures	1,681	2,767	$222 million	$399 million
Payments	242	319	$19 million	$31 million
Grand Total	**7,348**	**11,808**	**$827 million**	**$1.5 billion**

Source: Economic Contributions from BLM-Managed Lands, Bureau of Land Management.

Payment-in-Lieu-of-Taxes (PILT)

Payments-in-Lieu-of-Taxes (PILT) are federal payments provided to local governments to help compensate for forgone property tax revenues resulting from the presence of federally owned lands within their jurisdictions that are tax-exempt.

PILT revenues support essential local government services, including firefighting and law enforcement, construction and maintenance of public schools and roads, and emergency response activities such as search-and-rescue operations. Payments are issued annually based on eligible federal land acreage and population-based formulas.

Federal land-managing agencies whose lands are eligible for PILT include:

- Bureau of Land Management
- National Park Service
- U.S. Fish and Wildlife Service
- Bureau of Reclamation
- U.S. Forest Service
- U.S. Army Corps of Engineers

Through PILT, the federal government helps mitigate the fiscal constraints associated with extensive federal land ownership. It supports its broader responsibility to function for local communities (Table 9). Idaho ranked 7th nationally in PILT payments in FY 2025.

Table 9: PILT Payments by State, FY 2023 through FY 2025

Rank	State	2023	2024	2025
1	California	$61,029,530	$64,301,408	$66,180,784
2	New Mexico	$46,699,761	$49,840,617	$51,575,356
3	Utah	$46,208,003	$49,485,303	$51,433,821
4	Colorado	$45,524,696	$47,769,009	$51,313,462
5	Arizona	$43,501,616	$46,883,373	$48,307,909
6	Montana	$40,330,577	$43,301,694	$46,566,449
7	Idaho	$38,197,782	$41,152,787	$42,973,738
8	Alaska	$35,448,677	$37,501,208	$38,919,670
9	Nevada	$31,196,044	$32,996,305	$33,801,823
10	Oregon	$27,161,990	$30,115,454	$31,027,890

Source: Payment in Lieu of Taxes, U.S. Department of the Interior.

Secure Rural Schools (SRS)

The Secure Rural Schools and Community Self-Determination Act is a U.S. federal program that provides additional funding to rural counties and school districts with large areas of federally owned forest land, particularly where traditional timber-harvest revenue has declined. Payments are primarily made for lands managed by the U.S. Forest Service and the Bureau of Land Management.

In 2024, Idaho received approximately $4.5 million from SRS. These funds must be continuously appropriated by Congress and are not guaranteed. They are included in the economic contribution calculations.[xiv]

Source: Pixels – Alex Kad

Other Federal Operations in Idaho

Other federal agency operations in Idaho could be affected by a potential transfer of ownership to the State of Idaho. Unless otherwise stated, these are not included in the calculation of the economic contributions. They could become an issue in future discussions about ownership transfers. Many of these agencies are closely linked to private industries whose output depends on the flow of services from these agencies. For example, a considerable amount of water resources are managed by both the U.S. Army Corps of Engineers and the Bureau of Reclamation.

U.S. Army Corps of Engineers

The U.S. Army Corps of Engineers operates three dams in Idaho. In addition, the four Lower Snake River dams, although technically in Washington State, have a direct bearing on Idaho's economy. This occurs through the anadromous fisheries, which are crucial to the Idaho recreational fishing industry, and water transportation to the Port of Lewiston. Total federal operating and maintenance costs for Idaho dams are $8.2 million, and for the Lower Snake River Dams, they are $21.1 million, for a total of $29.4 million (Table 10).

Table 10: Dam Facilities Operated by the U.S. Army Corps of Engineers, 2025

Dam Facility	Operation	Maintenance	Total
Albeni Falls Dam	$1,381,000	$117,000	$1,498,000
Dworshak Dam and Reservoir	$2,464,000	$1,208,000	$3,672,000
Lucky Peak Lake	$2,518,000	$553,000	$3,071,000
Sub-Total Idaho	*$6,363,000*	*$1,878,000*	*$8,241,000*
Lower Granite Lock and Dam	$2,502,000	$6,170,000	$8,672,000
Little Goose Lock and Dam	$1,442,000	$1,987,000	$3,429,000
Lower Monumental Lock and Dam	$1,409,000	$2,103,000	$3,512,000
Ice Harbor Lock and Dam	$3,163,000	$2,364,000	$5,527,000
Sub-Total Washington	*$8,516,000*	*$12,624,000*	*$21,140,000*
Grand Total	**$14,879,000**	**$14,502,000**	**$29,381,000**

Source: U.S. Army Corps of Engineers Fiscal Year 2025 Budget Pressbook.

Bureau of Reclamation

The Bureau of Reclamation operates or owns 19 dams, 10 projects, and 5 power plants. They provide substantial water resources that fuel Idaho's agribusiness industry (Table 11).

Table 11: Bureau of Reclamation Projects in Idaho, 2025

Projects	Powerplants
Avondale Project	Anderson Ranch Powerplant
Lewiston Orchards Project	Black Canyon Powerplant
Little Wood River Project	Boise River Diversion Powerplant
Mann Creek Project	Minidoka Powerplant
Michaud Flats Project	Palisades Powerplant
Minidoka Project	
Preston Bench Project	
Rathdrum Prairie Project	
Ririe Project	
Teton Basin Project	

Dams	
American Falls Dam	Hubbard Dam
Anderson Ranch Dam	Island Park Dam
Arrowrock Dam	Little Wood River Dam
Black Canyon Diversion Dam	Mann Creek Dam
Boise River Diversion Dam	Minidoka Dam
Cascade Dam	Palisades Dam
Deadwood Dam	Reservoir A Dam
Deer Flat Lower Embankment	Ririe Dam
Deer Flat Middle Embankment	Soldiers Meadow Dam
Deer Flat Upper Embankment	

Source: Bureau of Reclamation.

The Bureau of Reclamation's 2025 budget requests totaled $55.3 million (Table 12). The annual operating expenditures by project were not available at the time of this study.[xv]

Table 12: Idaho Project Budget Requests Bureau of Reclamation, FY 2025

Idaho Projects	Total Budget Requests
Boise Area Projects	$16,291,000
Hungry Horse Project	$10,559,000
Lewiston Orchard Project	$424,000
Minidoka Area Projects	$28,034,000
Total	**$55,308,000**

Source: 2025 Budget Justifications, Bureau of Reclamation.

Source: Pixels – Brett Savles

Private Industry Outputs Tied to Public Lands

This report assumes that public- and private-sector outputs would remain the same under potential state ownership as under current federal ownership. The flow of economic production from these industries is substantial and thus warrants attention in this section of the report. Changes in resource management could have a profound impact (either negative or positive) on these respective industries. Table 13 presents the total jobs (including multiplier effects) for Idaho's agribusiness, forestry and wood products, mining, and tourism and visitors.[7] Total jobs were 244,175, or about 25% of Idaho's total employment in 2023 (971,396 jobs).[iii] A more detailed discussion of the contributions of each industry is presented in this section of the report below.

Table 13: Total Job Contributions by Industry Including Multiplier Effects

Industry	Total Jobs
Agribusiness	126,800
Forestry and Wood Products	28,890
Mining	12,015
Tourism and Visitors	76,470
Total Jobs	244,175

Sources: Watson, P. (2023), Peterson, S. (2025), DRA (2023), and Authors' Calculations.

[7] *Caveats: Each of these studies was conducted by different economists and firms. Some of the underlying assumptions of the analyses differ. The totals, however, appear to be within industry norms and consistent with other studies.*

Idaho Wood Products Industry Contributions

The Policy Analysis Group (PAG) at the University of Idaho calculates the contributions of the wood products industry to Idaho's economy regularly from both public and private lands and operations. In 2022, the industry harvested about 1.0 billion board feet in Idaho. Approximately 19% of lumber production was from the federal forests. The wood products industry supported about 17,097 direct jobs, including 2,938 in forest management, 4,192 in harvesting and logging, and 9,967 in wood products manufacturing. Total direct labor income created was $1.3 billion, and the direct Gross State Product was $1.6 billion.

Accounting for multiplier effects, the industry supports 28,890 jobs, $2.2 billion in labor income, and $2.8 billion in Gross State Product. These do not include other tourism and recreation contributions or other contributions from outside wood products and related support industries.[xxi]

Contribution Attributable to the Forest Product Harvest on Federal Lands

Assuming that wood products' contributions are proportional to the respective share of timber production, then the 19% federal share of timber production would contribute 5,489 total jobs, $420 million labor income, and $530 million gross state product, including the multiplier effects.[8] This is an approximation and an inquiry for future study.[xvi]

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[8] *The direct jobs would be 3,248 in this scenario.*

Agribusiness

Although most agriculture is privately owned and operated, the industry depends on services derived from public lands, particularly water resources and access to grazing acreage. A 2022 contribution assessment conducted by University of Idaho agricultural economists measured the industry's (production and processing), including the multiplier effects (Table 14).[xvii]

Table 14: Economic Contributions of Idaho's Agribusiness, 2022

Source	Contribution	Percent of State Total
Sales	$37.5 billion	17%
Gross State Product	$14.5 billion	12.8%
Total Compensation	$7.1 billion	10%
Jobs	126,800 jobs	11%

Source: Economic Contribution of Idaho Agribusiness, Watson, P. (2023).

Mining

Mining is heavily dependent on access to both USFS and BLM lands for exploration and mining. A 2024 study found that mining had significant economic contributions to Idaho's economy (Table 15).[xviii]

Table 15: Idaho Contributions of Mine and Mine Processing, 2024

Source	Contribution
Gross State Product	$1.73 Billion
Total Compensation	$866.2 Million
Total Jobs	12,015

Source. Peterson. 2024 Economic contributions of mining and mine processing on Idaho's economy.

Travel and Tourism

Dean Runyan Associates prepares an annual economic contribution assessment of visitors to Idaho and the state's tourism.[xxv]

In 2023, they estimated that 12.9 million visitors visited Idaho. The study focused on detailed measurements of direct effects and expenditures, as shown in Table 16.

Table 16: Direct Contributions of Idaho's Tourism/Visitor Economy (Not Including the Multiplier Effects), 2023

Source	Contribution
Visitor Spending	$5.8 billion
Total Compensation	$1.8 billion
Total State Taxes	$438.4 million
Jobs	55,360

Source: The Power of Idaho Tourism DRA 2023

The study reports *total* job contributions, including multiplier effects, at 76,470 jobs in 2023.

Methodology

Base and Non-basic Industry Drivers

An economic contribution assessment, in this context, is founded on export base theory. Under this theory, a basic activity brings *new money* into a regional economy. Base industries can include outfitters and guides, high-technology companies, medical services, retail trade services, federal government operations, tourism, and other manufacturing and service firms. Firms providing services to individuals living outside the region's trade center, such as medical and legal services, are included in the region's economic base. Payments from state and federal governments (including Social Security, Medicare, university funding, retirement income, and welfare payments) constitute external income sources for businesses and residents. These are counted as part of the economic base.

Non-basic industries are defined as economic activities within a region that support local consumers and businesses in the base sector. They re-circulate incomes generated within the area from the basic industries. Such activities include shopping malls serving the local population, local consumption of business and personal services, local consumption of medical services, and local construction contracts. Non-basic industries constitute the economy's support structure. Basic industries and jobs can typically exist in a region without a substantial supporting infrastructure (e.g., agriculture and natural resource extraction). However, non-basic resident-serving jobs (e.g., restaurants and barbers) require the presence of basic industries.

Basic industries are sometimes conflated with non-basic industries because nearly every firm and every occupation devote some fraction of its time and resources to both basic and non-basic activities. Barbers or hairdressers traditionally cut hair for residents; few people are likely to fly to Lewiston to get a haircut. However, some visitors to the region will have their hair cut by the local barber, and the money they spend represents a form of basic income for the area. A critical example for regions like Lewiston is the large retail trade sector. They employ a substantial percentage of the workforce but have a minimal economic impact because most retail sales are directed to residents.

They bring little new money into the county. Thus, the size effect suggests that the retail trade sector accounts for a substantial share of employment and earnings in the economy. Most of this employment and earnings activity is attributed to other local “export-oriented” industries that generate revenues for the community through external sales. From a “size” perspective, the retail trade sector appears large. However, from an export base perspective, which determines the economy's “drivers,” the retail trade sector is much smaller. Only retail trade activities that serve visitors from outside the area can be counted as export-based activity and employment.

Export-based analysis is essential for identifying a region's vital export industries. Non-basic sectors, on the other hand, are necessary for keeping money within a region and stimulating growth and local economic activity for residents. In this respect, non-base industries can function in the same way as export industries. For example, suppose an Idaho patient elects to undergo surgery at a local hospital rather than traveling to a medical center in Spokane, Washington. The substitution of local services for imported services increases demand for local business services. The same is true for the retail and service sectors, as they keep income in the community that would otherwise leak out. Maintaining sales and revenue in the community increases the number of times money circulates through the economy before it is spent on imports. The overall effect of import substitution can be viewed as analogous to an increase in demand for an export industry. Import substitution and export base theory are opposite sides of the same coin.

Most of the economic activity associated with managing federal lands is considered basic. Most economic outputs are also basic.

Defining and Explaining Economic Contributions (Data and Methodology)

The contributions' results are broken down into three categories:

- **Direct** – the primary change in final demand for an industry under analysis.
- **Indirect** – the business-to-business transactions that stem from the direct effects; and
- **Induced** – the household-to-business transactions that stem from the owners and employees of the primary industries under analysis.

The indirect and induced effects are often referred to as multiplier effects because they amplify the direct effects as they propagate through the Idaho economy.

The direct effects are related to federal agency spending and to exports associated with federal land expenditures. The indirect effects are driven primarily by agency expenditures and their intermediate inputs to production. All local intra-industry purchases are captured within the indirect effects. But this also captures vendors' spending with their suppliers until the money leaks out of the county to purchase imports. Expanding the local supply chain of businesses will enlarge these indirect contributions.

The induced effects arise from federal agency employees' wages and salaries, as they spend money at local restaurants, retailers, and grocery stores. As these employees' incomes expand, so do their expenditures and the induced effects that stem from those incomes.

It will be helpful to discuss a system of accounts embedded in the model. The system of accounts known as Input-Output (I-O) represents an economists' version of double-entry bookkeeping for industries. Figure 7 below shows a simplified version of an I-O matrix with only a few industries.

It also includes the contributions of consumer spending related to this economic activity. The following economic model outputs are reported:

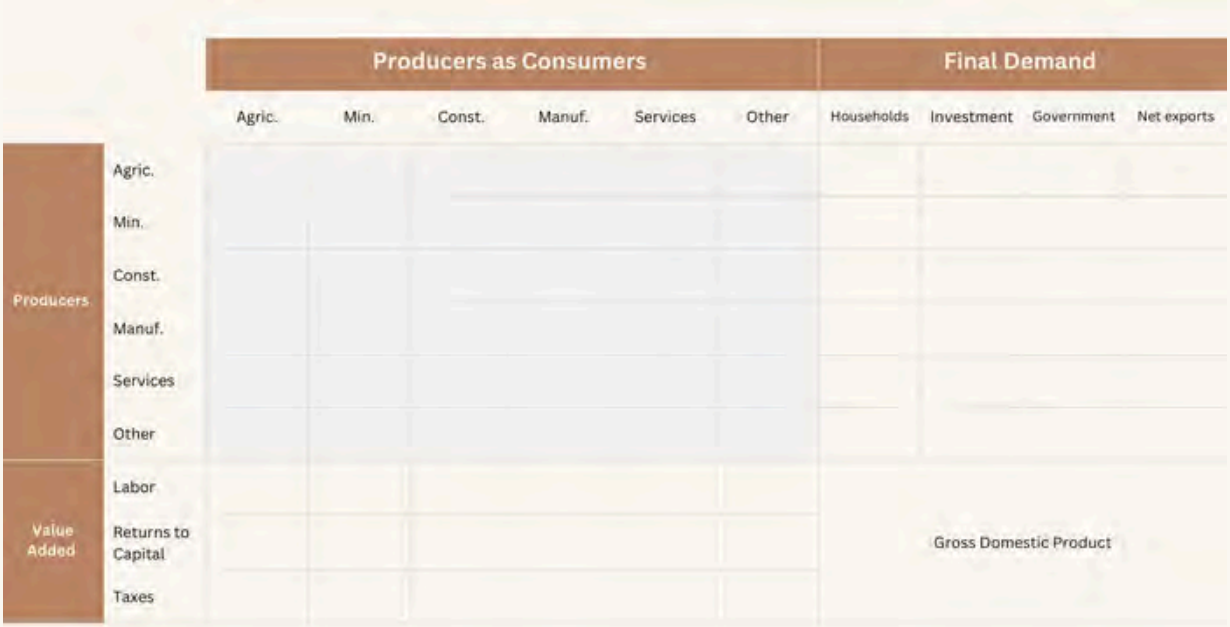
1. **Sales (output):** Reflects the total transactions from all sources by direct, indirect, and induced economic activity (i.e., including the multiplier effects).
2. **Gross regional product (or value added):** A subset of sales. It measures the net increase in the economy resulting from an increase in local base expenditures. It includes wage and salary earnings (payroll), proprietors' income, other property income, and indirect business taxes.
3. **Earnings (payroll):** A subset of gross regional product and includes wage, salary, and other income payments, including fringe benefits to workers (including the multiplier effects).
4. **Employment:** represents the total employment resulting from economic activity (including the multiplier effects).
5. **Taxes:** This analysis includes all taxes, including personal income taxes and corporate income taxes. At the local level, they primarily include property and sales taxes (including the multiplier effects).

The primary indicators of economic activity most relevant are value added, earnings (payroll), jobs, and indirect business taxes.

Sales vs. Gross Regional Product

A way to explain why sales overstate impacts is to imagine individuals spending money in a regional economy. Suppose an individual pays $40,000 for a new truck. Another individual spends the same amount on an appendectomy at the regional hospital. From a sales perspective, the impact is the same: $40,000. However, from a value-added perspective, the purchase of the truck provides less for the regional economy. Perhaps $30,000 of the truck purchase had to be paid to the manufacturer in Detroit or Japan immediately. Conversely, the appendectomy at the hospital likely generated most of the stay-local income for the doctors, nurses, and hospital staff. Perhaps only $10,000 leaves the region to import capital assets such as hospital beds and scalpels. From a value-added perspective, the hospital is more valuable than the auto dealership, even though they are equivalent in sales.

Figure 7: Aggregated Input-Output Matrix



Source: Authors' Calculations

Reading down a column in Figure 7 shows you what inputs an industry is buying to produce its output. If we look at the agriculture column, they may purchase seed from themselves, fertilizer and farm equipment from the manufacturing sector, and legal and accounting services from the service sector. Payments to their employees are recorded in the "Labor" row. They receive returns on the capital they own and pay taxes to the government. Reading across a row tells us where an industry's income originates. Sticking with agriculture, they sell seed to others in the agricultural sector; their crops may be sold to processing plants in the manufacturing sector, or perhaps directly to consumers. A portion of a household's expenditures will go to buying agricultural goods, and even the government may purchase agricultural goods. Lastly, the farm industry will sell its output abroad via the "Net exports" column.

Summing labor, capital, and tax payments across all industries yields the region's total value added, which equals the region's Gross State Product (GSP). Similarly, summing the expenditures of households, the government, investment, and net exports yields the area's GDP. These two methods of calculating GDP are known as the Income and Expenditure approaches, respectively, and they serve as a check to ensure all accounts balance. It is through the I-O system that we can trace the dollars through the economy and calculate multiplier effects.

Results

Direct Agency Expenditures

Total estimated expenditures are $570 million for the USFS, $222 million for the BLM, about $41 million for PILT, and $4.5 million for SRS (Table 17). Total estimated annual expenditures are $838 million and constitute the *base case* for this analysis. Given the uncertainty in some expenditure flows, a lower-bound estimate of $500 million was also included in the report.

Table 17: Direct Federal Agency Expenditures in Idaho, FY 2023-2024

Agencies	Direct Expenditures
USFS	$570 million
BLM	$222 million
PILT and SRS	$46 million
Total	$838 million

Sources: USFS, BLM, PILT, SRS, and Authors' Calculations.

[9] *The USFS and BLM data were obtained from various sources, including the federal agency sources and study partners with internal communications. These numbers are deemed to be accurate but not guaranteed. They are estimates. A formal data request has been issued (i.e., FOIA), which was unavailable at the time of Phase I of this study. The new data will be included in Phase II.*

USFS Expenditure Data

USFS obligated or expended approximately $682 million on seven national forests (or management units) in Idaho. This total includes almost $112 million in one-time supplemental funds for implementing the Inflation Reduction Act, the Infrastructure Investment and Jobs Act, and work related to natural disasters. Of that total, USFS expended $203.7 million in Wildland Fire Management suppression funds on fire incidents in 2024 (Table 18).[9] These federal dollar expenditures represent an injection of new money into Idaho's economy, which economists call base expenditures.

Table 18: Forest Service Direct Expenditures in Idaho, FY 2023-2024

Expenditure Type	Direct Expenditures
Total FY2024 FS Expenditures	$682 million
One-Time Appropriation	$112 million
Net Fiscal Year	*$570 million*
Fire Suppression	$204 million
Net Operations	**$366 million**

The one-time $112 million appropriation was excluded from the contribution calculations because it is not an annual expenditure.

Caveats and Limitations of Data

There are many caveats relating to the data. Generally, the USFS and BLM do not regularly report expenditures by state, especially the USFS. The expenditure data from BLM were obtained directly from the agency, which spent $222 million (i.e., direct output) in Idaho as part of its economic contribution assessment. The USFS data originated from communication with trusted partner sources. These numbers will be confirmed and/or updated upon fulfillment of the FOIA request. The PILT and SRS are both published regularly and considered more reliable.

Very little, if any, financial details or expenditure breakdowns are provided by any of the sources. The IMPLAN model, industry-level supply chains, and production functions were used as proxies.

IMPLAN Economic Models

Two Idaho IMPLAN models were employed. The first model represented USFS agency spending from a $366 million change to federal government operations (64% of the total).[10] The second model was designed to measure field expenditures and fire suppression efforts and accounted for $204 million, or 36% of the total. Direct total expenses were $570 million.

A similar breakdown was used to model the contributions of BLM. Approximately 72% is allocated to federal government operations ($160 million) and 28% ($62 million) to field work and fire suppression.

The field and fire suppression model was developed because some USFS and BLM activities and services are not fully captured by the federal government sector alone. Most federal government workers are employed in offices, with most expenditures attributable to wages and salaries. However, a portion of both the USFS and BLM operations involves fieldwork or firefighting, which requires a different type of analysis, as represented by the field and fire suppression models. The input expenditure was adjusted (i.e., reduced) for imports (out-of-region expenditure) and for margining the retail and wholesale sectors (i.e., excluding out-of-region expenses) (Table 19).

Table 19: IMPLAN Field and Fire Suppression Template

Expenditure Type	Industry Description	IMPLAN Code	Percent of Total
Aviation & specialized fire contractors	Support activities for air transportation	402	20%
Ground equipment rental/leasing	Commercial machinery/equipment leasing	435	10%
Trucking/hauling/transport services	Truck transportation	399	8%
Lodging/incident facilities	Hotels and motels, including casino hotels	489	10%
Food services – full-service	Full-service restaurants	491	6%
Food services – limited-service	Limited-service restaurants	492	3%
Food services – other	All other food and drinking places	493	1%
Fuel – retail purchases	Retail - gasoline stores	391	6%
Fuel – wholesale/bulk	Wholesale - Petroleum	382	6%
Supplies – general merch retail	Retail - general merchandise stores	394	5%
Supplies – misc. retail	Commercial machinery repair	497	5%
Repairs & maintenance	Other support services	460	10%
Admin/logistics / misc. services	Federal Employment	Labor Income	10%
Total			**100%**

Source: IMPLAN and Authors' Calculations

[10] *$366 million (64%) of the total $570 million is allocated to basic operations, and $204 million (36%) to fieldwork and fire suppression.*

Contributions Base Case

The contributions are reported in Table 20. The first column reports on sales (output), the broadest (i.e., gross) measure of contributions. Gross State Product is a net subset of sales (output). Total compensation (i.e., labor income) consists of wages, benefits, and proprietor income and is a subset of GSP.

Total USFS contributions are $810 million in sales, $623.3 million in GSP, and 4,405 jobs. Total BLM contributions are $345 million in sales, $268.2 million in GDP, and 2,439 jobs. Payment-in-lieu-of-taxes and Secure Rural Schools payments create $74 million in sales, $62.5 million in GSP, and 647 jobs.

Grand Total: Total sales (output) were $1.23 billion, $0.95 billion in Gross State Product, $0.641 billion in total compensation, and 7,491 jobs.

The economic activity generated by federal agency expenditure creates an annual flow of tax revenues, as shown in Table 21. Property tax contributions are $20.3 million, and sales and excise taxes are $50.1 million. Income taxes total $22.4 million, bringing the total to $93.8 million in state and local taxes, including multiplier effects.

Table 20: Base Case Economic Contributions from Federal Agency Spending, 2024

Federal Agency	Sales (Output) Transactions	Gross State Product	Total Compensation	Total Jobs
Forest Service Operations	$555,070,827	$478,766,905	$301,900,689	2,772
Forest Service Field Work /Fire	$255,157,339	$144,519,716	$93,537,270	1,632
Total Forest Service	$810,228,166	$623,286,621	$395,437,959	4,405
BLM Operations	$267,774,344	$224,210,382	$172,363,226	1,942
BLM Field Work /Fire	$77,662,028	$43,987,346	$28,469,861	497
Total BLM	$345,436,372	$268,197,728	$200,833,088	2,439
PILT and SRS	$73,868,486	$62,474,658	$45,080,312	647
Total	**$1,229,533,023**	**$953,959,006**	**$641,351,358**	**7,491**

Source: IMPLAN and Authors' Calculations

Table 21: State and Local Tax Contributions from Federal Agency Spending, 2024

Tax Contributions	Taxes Foregone
Property (Local)	$20,326,293
Sales/Excise	$50,093,932
Income	$22,422,724
Total	**$92,842,949**

Source: IMPLAN and Authors' Calculations

Contributions Lower-Bound Case

Due to uncertainty regarding some verified level of direct federal expenditures and the lack of expenditure details, we created a lower-bound scenario. Overall, the lower-bound scenario accounts for approximately 60% of the base-case scenario's direct expenditures and results. Direct federal total expenses are approximately $500 million annually, down from $838 million in the base-case scenario. The magnitude of the contributions remains substantial in the lower-bound case.

Total sales (output) were $742.0 million, $577.4 million in Gross State Product, $395.4 million in total compensation, and 4,684 jobs (Table 22). The tax contributions are presented in Table 23. Property tax contributions are $20.3 million, and sales and excise taxes are $50.1 million. Income taxes total $22.4 million, bringing the total to $93.8 million in state and local taxes, including multiplier effects.

Table 22: Lower Bound Economic Contributions from Federal Agency Spending, 2024

Federal Agency	Sales Transactions	Gross State Product	Total Compensation	Total Jobs
Forest Service Operations	$277,535,413	$239,383,452	$150,950,344	$1,386
Forest Service Field Work/Fire	$127,578,670	$72,259,858	$46,768,635	$816
Total Forest Service	$405,114,083	$311,643,310	$197,718,979	$2,202
BLM Operations	$214,219,475	$179,368,306	$137,890,581	$1,554
BLM Field Work/Fire	$62,129,622	$35,189,877	$22,775,889	$397
Total BLM	$276,349,097	$214,558,182	$160,666,470	$1,951
PILT	$60,572,158	$51,229,219	$36,965,855	$531
Total	**$742,035,339**	**$577,430,712**	**$395,351,305**	**4,684**

Source: IMPLAN and Authors' Calculations

Table 23: Lower Bound State and Local Tax Contributions from Federal Agency Spending, 2024

Tax Contributions	Taxes Foregone
Property (Local)	$12,138,634
Sales/Excise	$29,915,535
Income	$13,390,599
Total	**$55,444,769**

Source: IMPLAN and Authors' Calculations

Caution & Limitations of the Contributions Analyses

This study presents the results of the USFS and BLM contribution assessments, respectively. We also employ some of their modeling metrics in this study's analyses. There are cautions. Neither the USFS nor the BLM reported their methodologies or the complete analysis of their studies. They only published their results. For the USFS, we could not determine their direct expenditures, economic models, regional configurations, or total output. For the BLM model, we could not determine gross state product (GSP) or labor income. The results of this study were reasonably comparable to those of the BLM study, but there were substantial differences relative to the USFS study. The USFS study was conducted in 2019, before the COVID-19 pandemic and the associated inflation and supply chain effects on economies. That may explain some of the differences. We anticipate receiving additional details on these studies for inclusion in our Phase II updates.

Source: Melissa Hendrickson

Conclusions

The goal of this study is to identify the likely costs of federal land transfers to the State of Idaho. This study does not take a position on the transfer of ownership of public lands to state ownership. It examines the potential implications for Idaho taxpayers, the outdoor recreation industry, tourism, and Idaho citizens whose access to public lands has been integral to their way of life for generations.

The scenarios under consideration estimate the potential costs to the State of Idaho and other stakeholders from transferring ownership to the State of Idaho *if* the public lands were maintained in their current use. If ownership were to change, public land use would likely shift to generate the revenues needed to cover costs currently funded by the federal government. There would be increased taxpayer exposure to potential funding gaps. It is also possible that some of these lands could be sold off in the future to private entities.

Source: Melissa Hendrickson

Table 24 presents the direct agency expenditures for the base-case *scenario*.

Table 24: Direct Estimated Annual Federal Agency Expenditures, FY 2023-2024

Federal Agencies	Direct Expenditures
USFS	$570 million
BLM	$222 million
PILT and SRS	$46 million
Total	**$838 million**

Sources: USFS, BLM, Authors' Calculations, and Other

The magnitude of the potential exposure to Idaho's taxpayers is evident in comparison with Idaho's General Fund, which in FY 2024 was $5.4 billion. The base-case potential funding shortfall represents about 15.6% of the General Fund revenues ($837.7 million/$5.4 billion). The lower-case scenario accounts for approximately 9.3% of the General Fund ($500 million of $5.4 billion).

A reduction in federal agency dollars would result in a loss of $954.0 million in Gross State Product, $641.4 million in total compensation, and 7,491 jobs, including multiplier effects. This represents the decline in Idaho's economy if the federal dollar agency inflows and related expenditures were to cease with a transfer to state ownership (Table 25).

Table 25: Base Case Economic Contributions from Federal Agency Spending, Including the Multiplier Effects, 2024

Federal Agency	Gross State Product	Total Compensation	Total Jobs
Forest Service	$623.3 million	$395.4 million	4,405
BLM	$268.2 million	$200.8 million	2,439
PILT and SRS	$62.5 million	$45.1 million	647
Total	**$954.0 million**	**$641.4 million**	**7,491**

Source: IMPLAN and Authors' Calculations

This report assumes that public- and private-sector outputs would remain the same under potential state ownership as under current federal ownership. The flow of economic production from these industries is considerable and thus worth noting. Changes in resource management could have a profound impact (either negative or positive) on these respective industries. Total jobs of agribusiness, forestry and wood products, mining, and visitor tourism were 244,175 (including the multiplier effects), or about 25% of Idaho's total employment in 2023 (971,396 jobs).

The effects of land transfers could have long-term implications for the entire economy, as most Idaho families and businesses have direct or indirect ties to outdoor recreation activities.

About the Authors

Steven Peterson is a Regional Economist and Clinical Associate Professor at the University of Idaho, College of Business and Economics, where he has been employed for over 25 years. Peterson's research expertise is in local and regional economic analyses, with a focus on economic impact studies. Steve has conducted over 300 economic impact studies in his career, covering virtually every industry in Idaho and the Pacific Northwest, including energy, agriculture, manufacturing, wood products, Tribal studies, tourism, mining, health care, transportation, climate change analysis, education, and nonprofit organizations.

Timothy Nadreau serves as an Assistant Professor at the University of Idaho and an Adjunct Professor at Washington State University's IMPACT Center during the academic year. He has been an instructor and curriculum designer in NYU's School of Professional Sciences and led a team of consultants at Economic Modeling Specialists Int. (now Lightcast) where he conducted impact and investment analyses, provided expert witness testimony, and established quality-control metrics for the company. Currently, Dr. Nadreau consults on a range of regional economic development initiatives. He has completed studies on everything from Native American wines to electricity transmission infrastructure to housing affordability studies. Human capital Development remains his primary research focus.

Stephen Pool is an Economist who's been working in the Pacific Northwest for over 15 years. He worked for Economic Modeling Specialists Int. (now Lightcast) for seven years, managing their Canadian economic model and leading more than 150 economic impact studies during his tenure there. Today, he works as an Education Economist in the Office of Institutional Research at Washington State University, writing the university's State of Washington environmental scanning series and reviewing and aligning WSU's programs with Washington's labor market demands. Stephen has worked as a Regional Economist since 2011; his studies include economic impact analyses on energy, tourism, manufacturing, economic development, transportation, education, and climate change.

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