



Tourism & Recreation: A Big Force in MT

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Outdoor REC Act passed – unanimous and bipartisan

- **Outdoor recreation in the USA is \$646 billion in consumer spending**
- **6.1 million American jobs**
- **\$80 billion in federal, state, local tax revenue**



Montana Outdoor Recreation Economy

- **\$5.8 billion in consumer spending***
- **64,000 direct jobs**
- **\$403 million in state & local tax revenue**



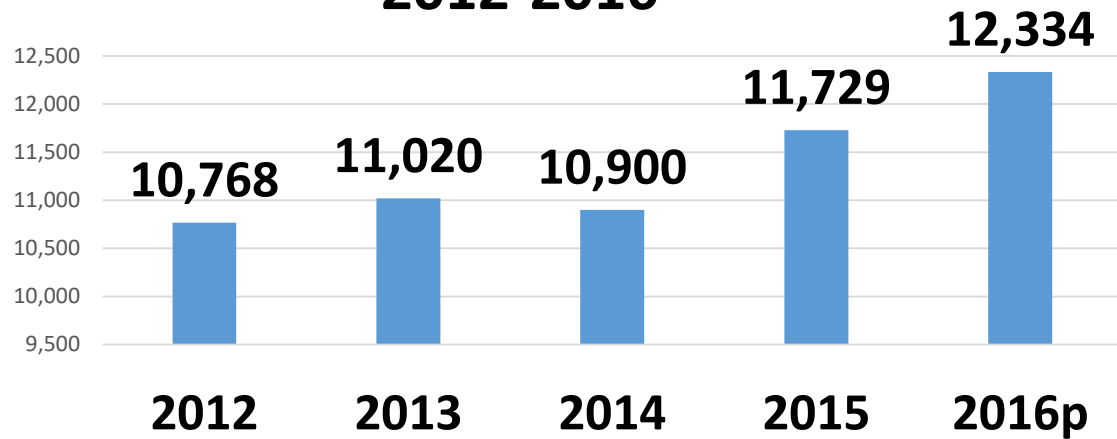
U.S. Travel Industry

- Direct spending on Leisure travel is \$651 billion*
- 15.1 million American jobs supported by travel spending
- \$147 billion in federal, state, local tax revenue generated by travel spending



Montana Nonresident Travel Industry

Nonresident Visitation 2012-2016*



- \$3.5 billion in consumer spending
- 52,630 combined Montana jobs;
38,300 direct jobs
- \$194 million in state & local tax revenue



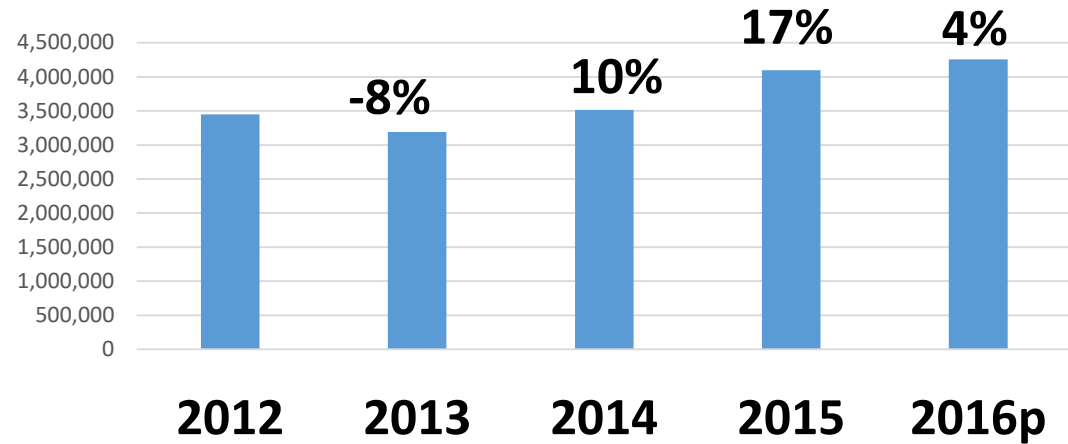


The Outdoors IS our Business

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Yellowstone National Park

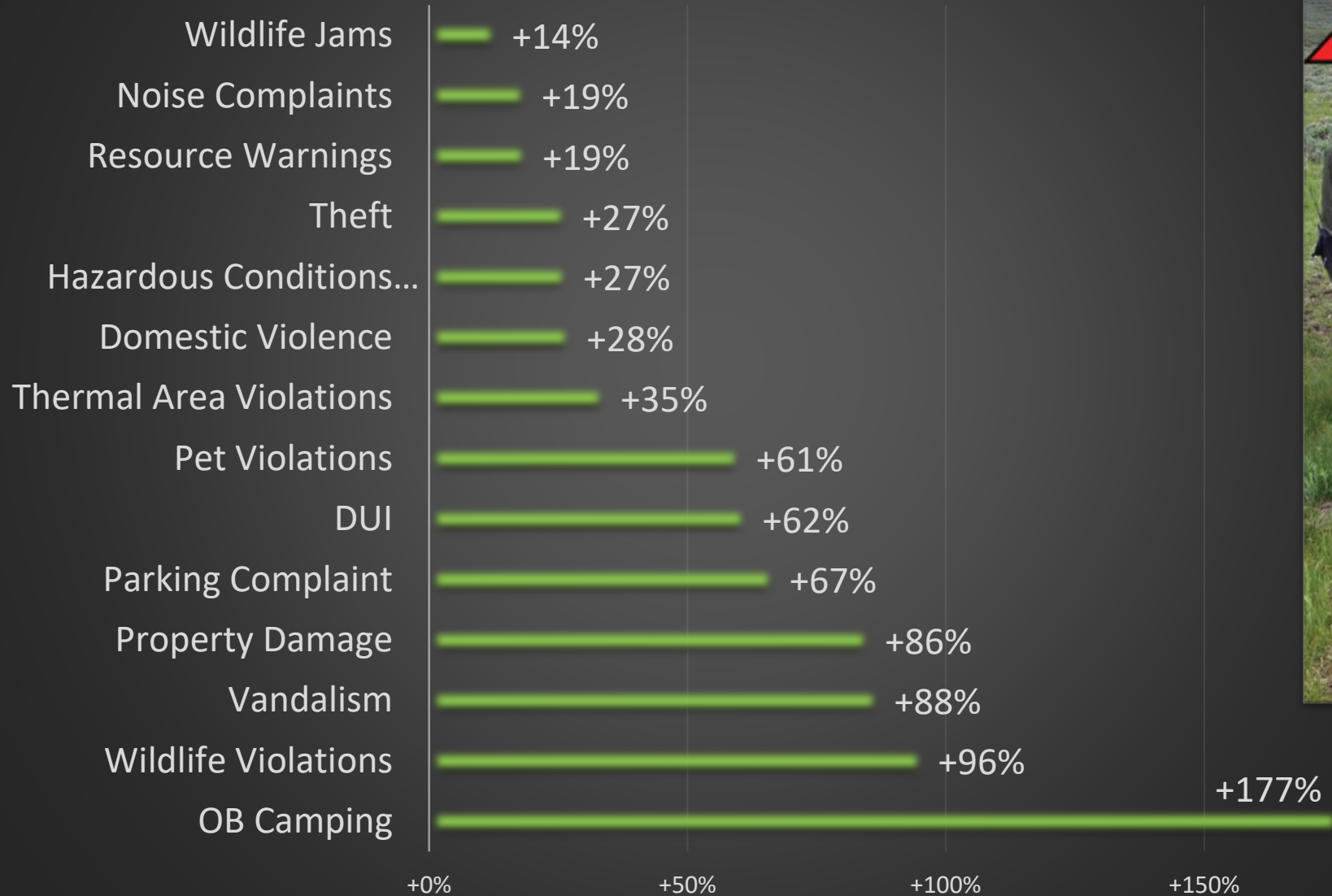
5-Year Yellowstone National Park Visitation



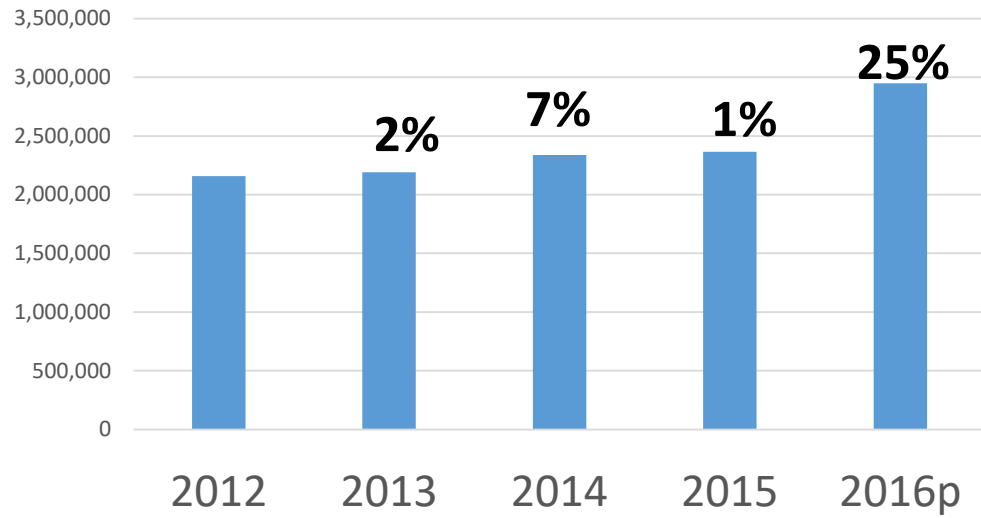


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Incidents Involving Impacts to Resources and Visitor Experience 2014 to 2015



5-Year Glacier National Park Visitation



Glacier National Park



July Attendance Shatters All-Time Record in Glacier National Park

More than 1.5 million visitors have passed through the park's entrances this year

BY BEACON STAFF // AUG 8, 2016 // OUTDOORS

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Every month in 2016 shattered the same month of the previous year.

CLOSED



Aug. 19, 2016 - Yellowstone River

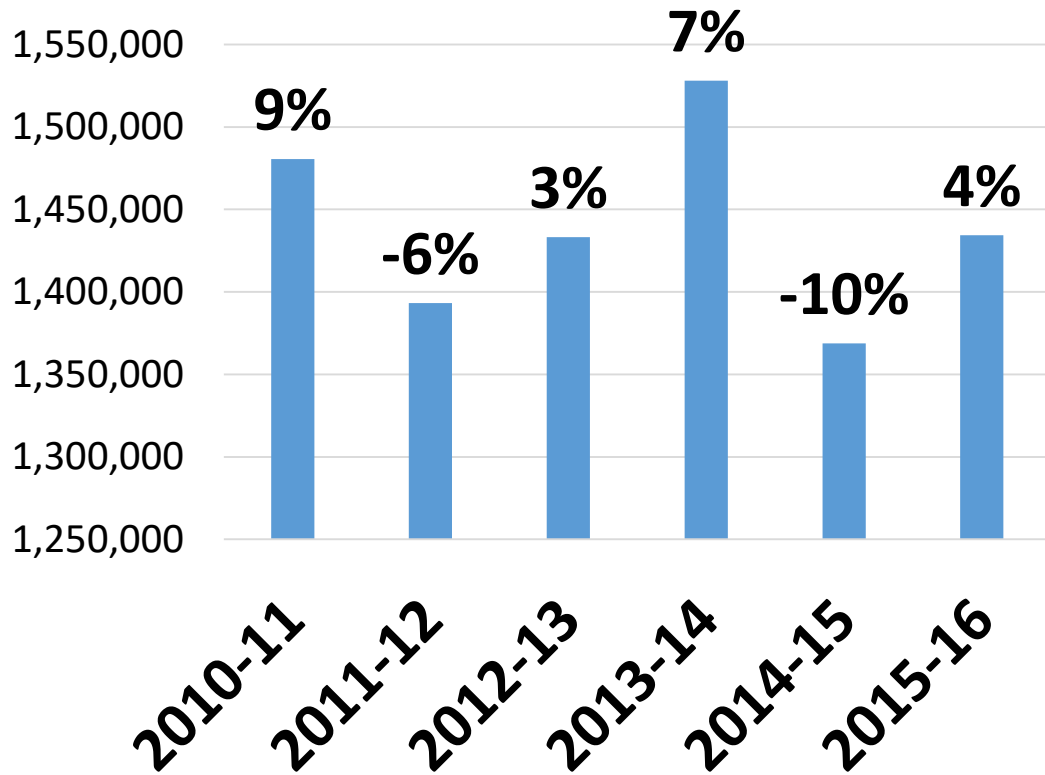
Nov. 8, 2016 - Tiber Reservoir and Canyon Ferry

- Parasite in mountain Whitefish found in Yellowstone River
- The invasive species mussel larvae were found in Tiber and Canyon Ferry Reservoirs and closed.
- Glacier NP and waters on the Blackfoot Reservation were also closed as a precaution.

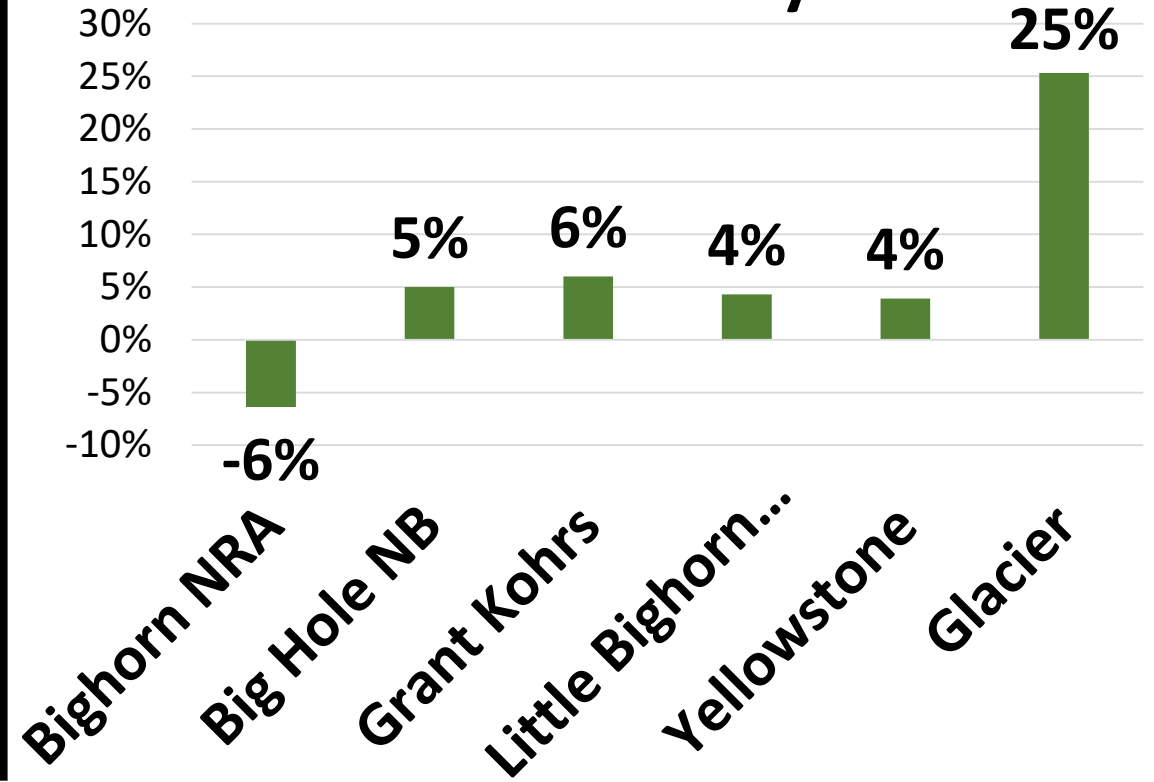


Montana Trends

Ski Area Visits

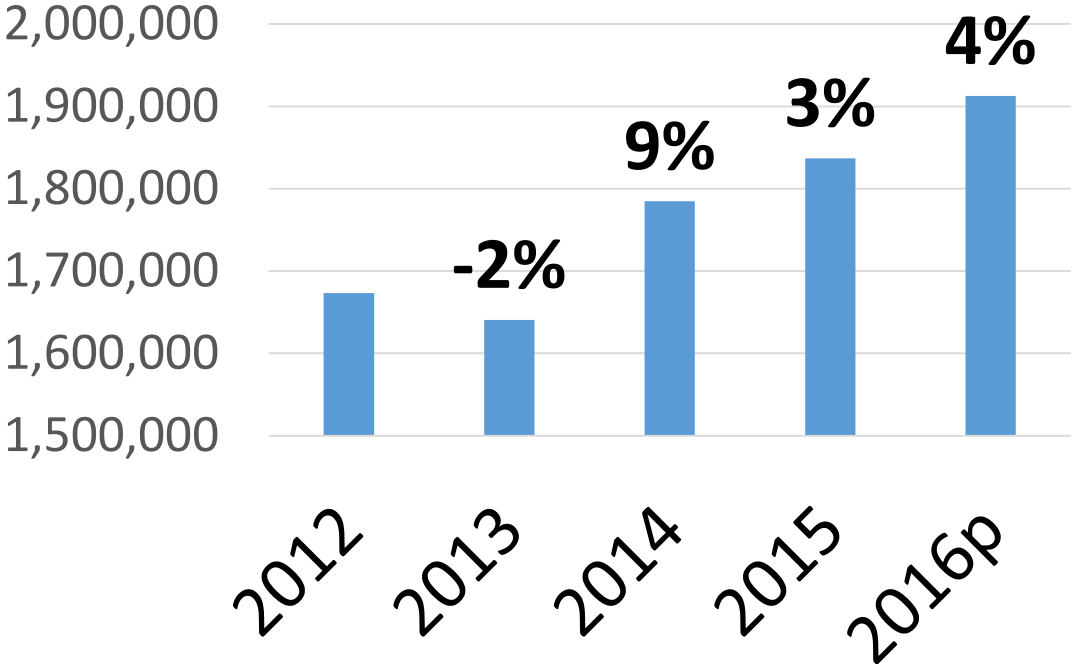


% change 2015-2016 in MT's National Park System



Montana Airport Deboardings

**All Airport Deboardings:
2012 – 2016p**



| Airport City | 2015-2016 % change |
|--------------|--------------------|
| Missoula | +8% |
| Bozeman | +7% |
| Helena | +5% |
| Kalispell | +4% |
| Billings | +1% |
| Great Falls | -3% |
| Butte | -4% |

Outlook 2017

- MT Tourism business annual outlook survey
 - 57% expect an increase
 - 36% expect to stay the same
 - 7% expect a decrease
- US Travel Forecast
 - +2% leisure travel
 - -0.6% business travel





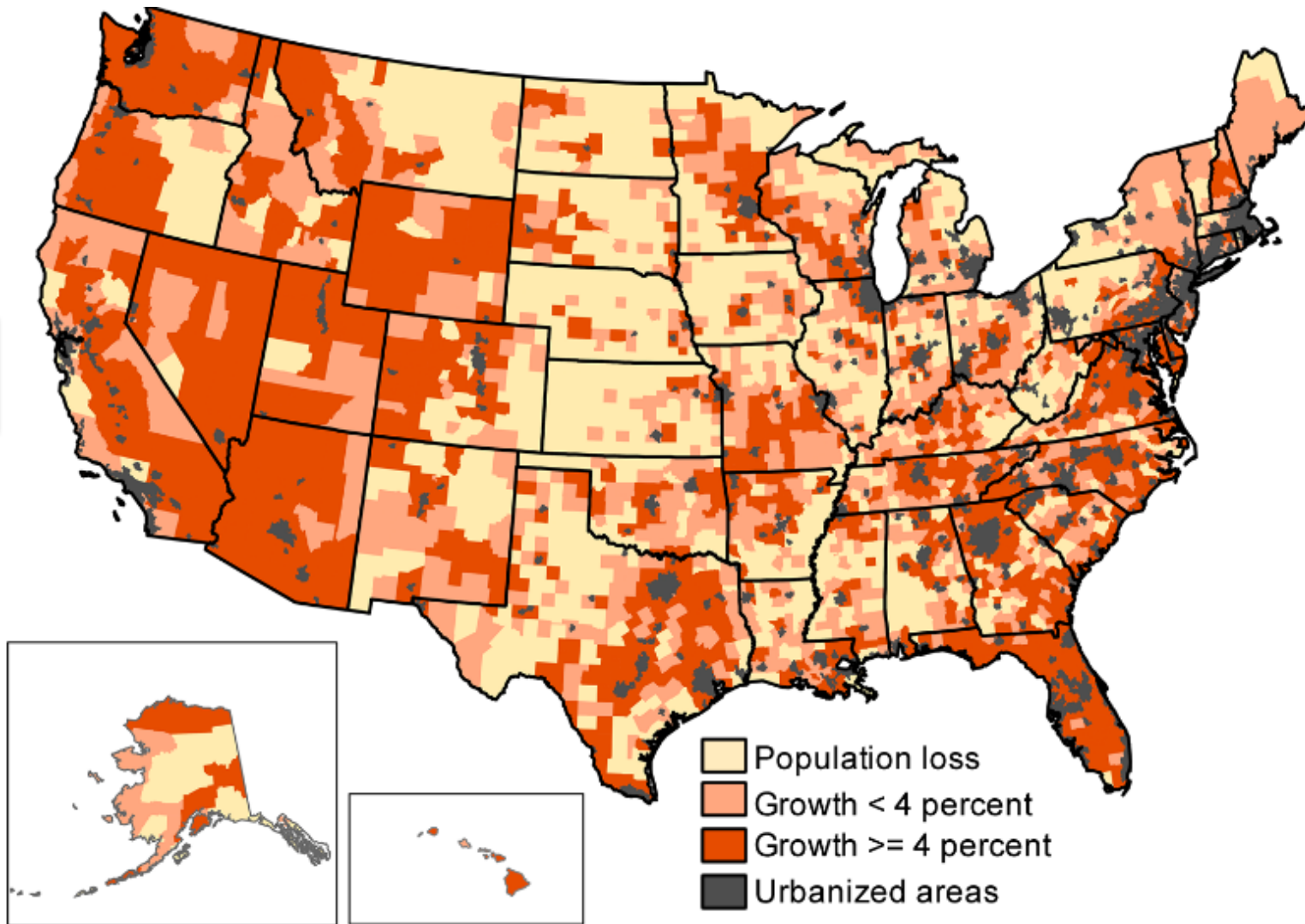
Thank you!

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Visitor Characteristics and Economic Analysis of Northeast Montana

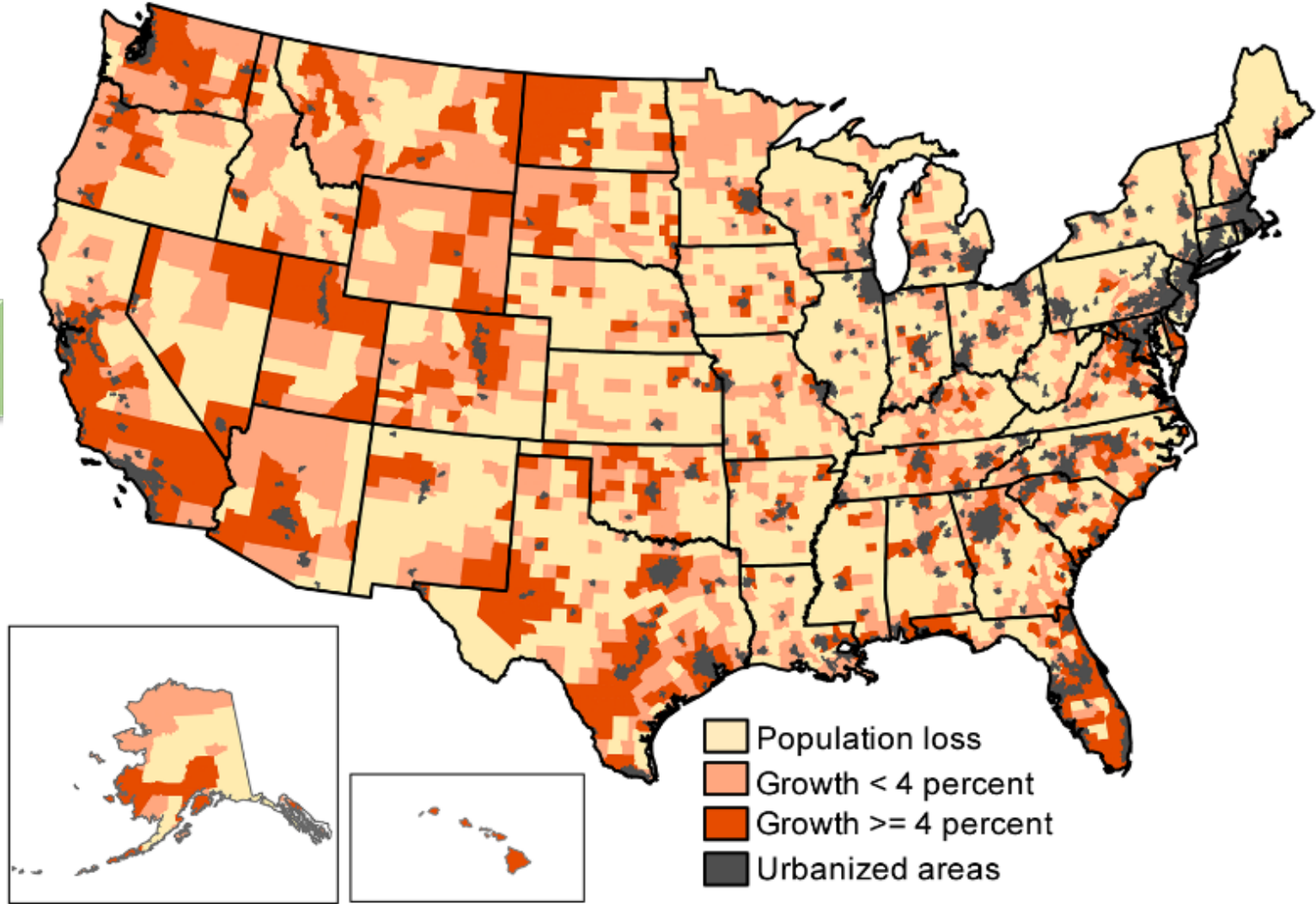


County Population
Change 2002-2007

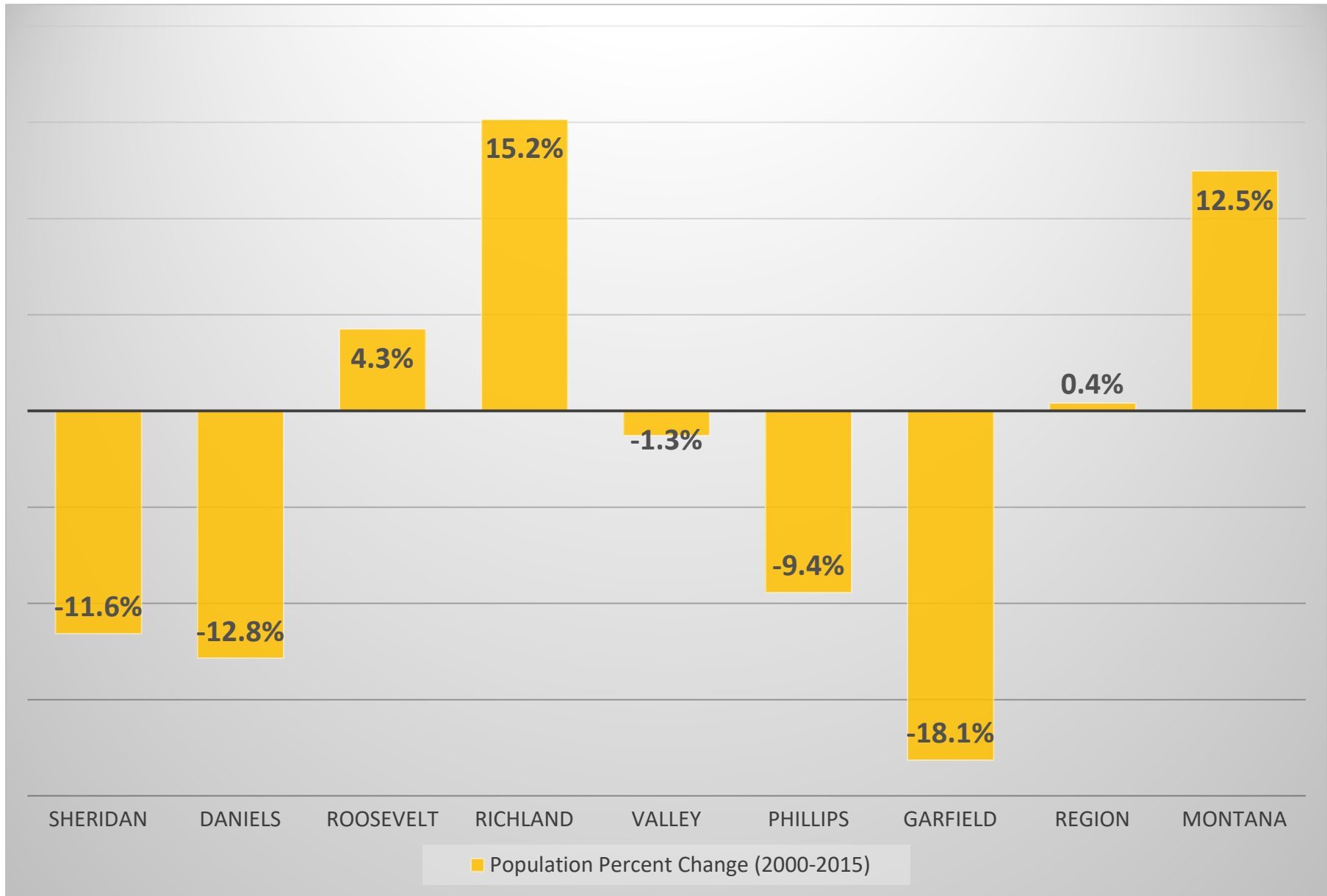


Source: USDA, Economic Research Service

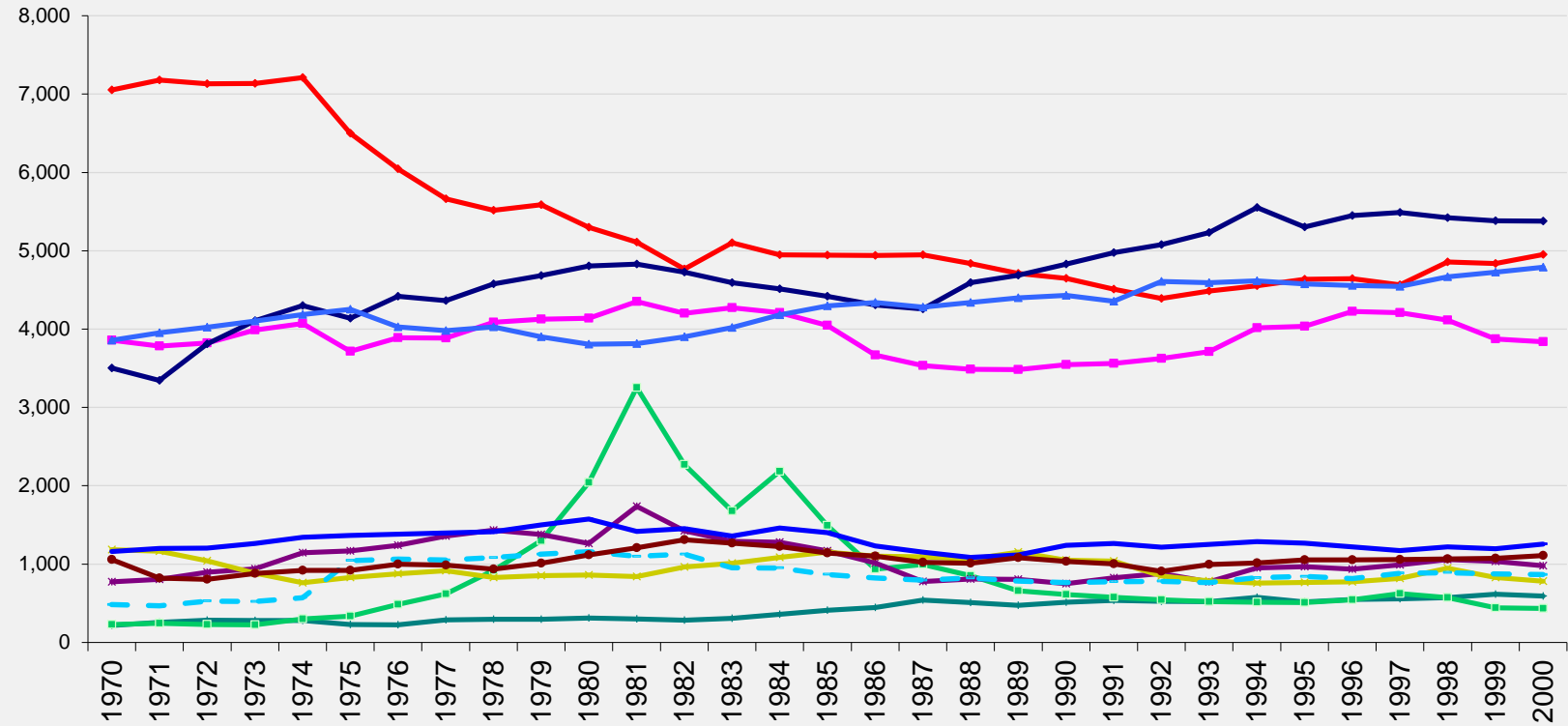
County Population
Change 2010-2015



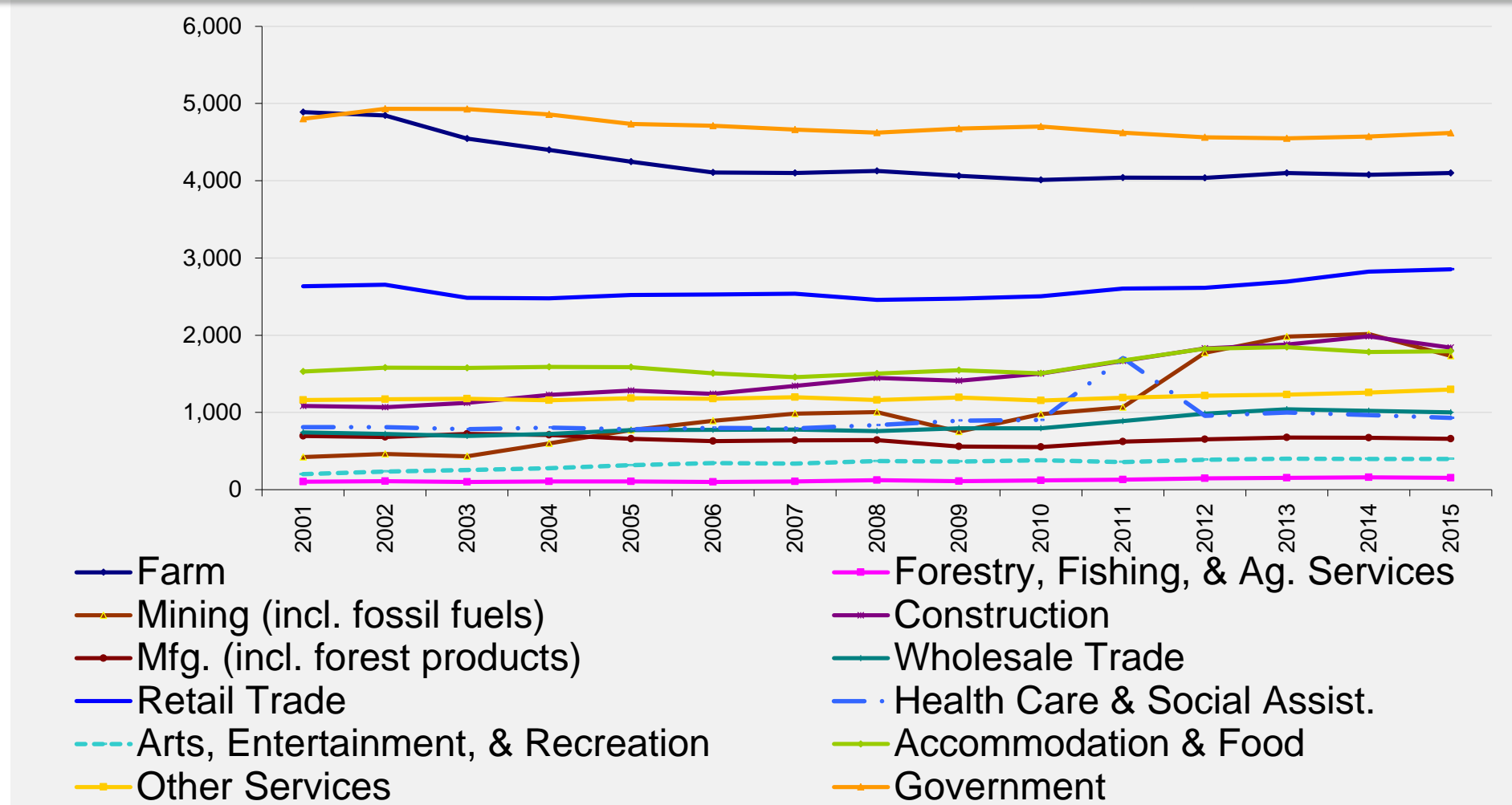
Source: USDA, Economic Research Service



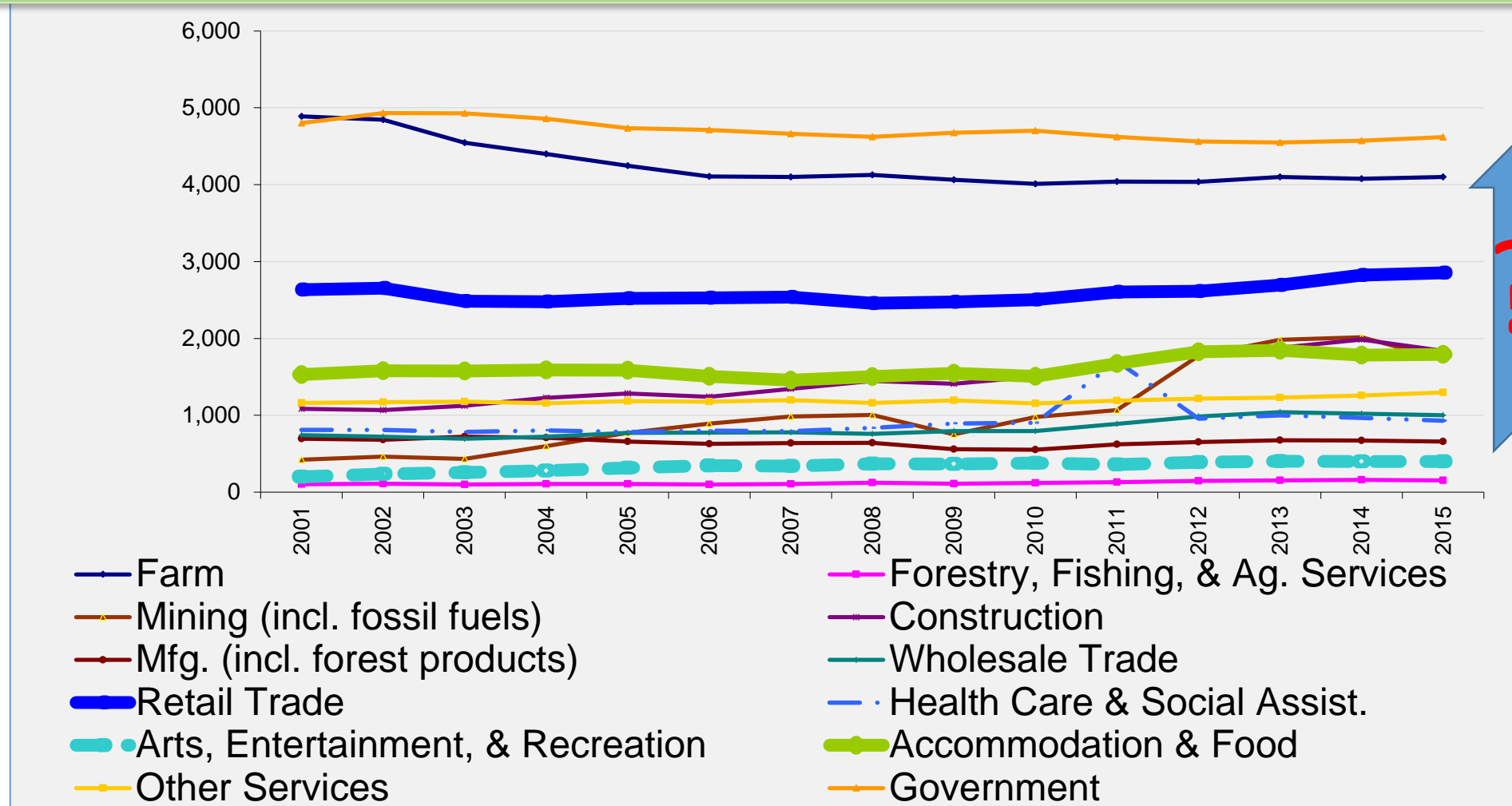
Employment by Industry (1970-2000)



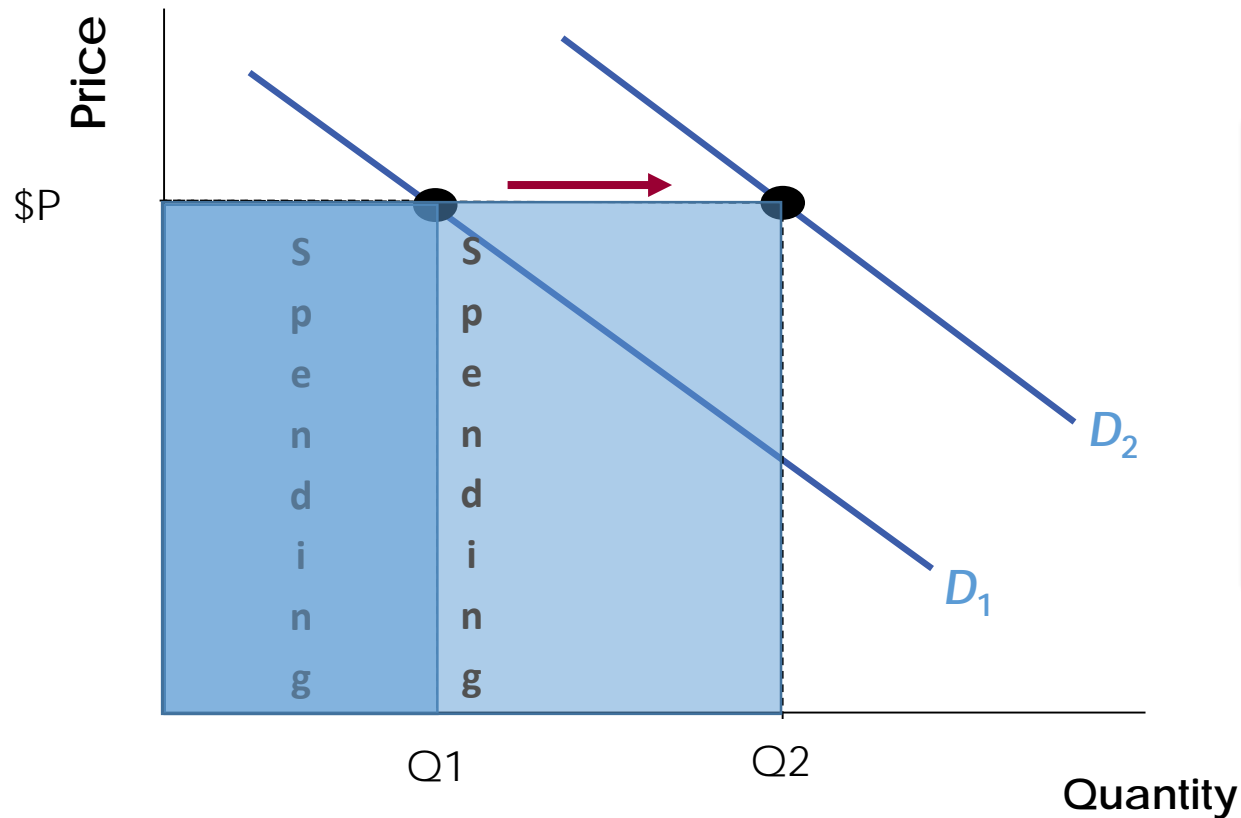
Employment by Industry (2001-2015)



Employment by Industry (2001-2015)



Shifting the Demand Curve Rightward

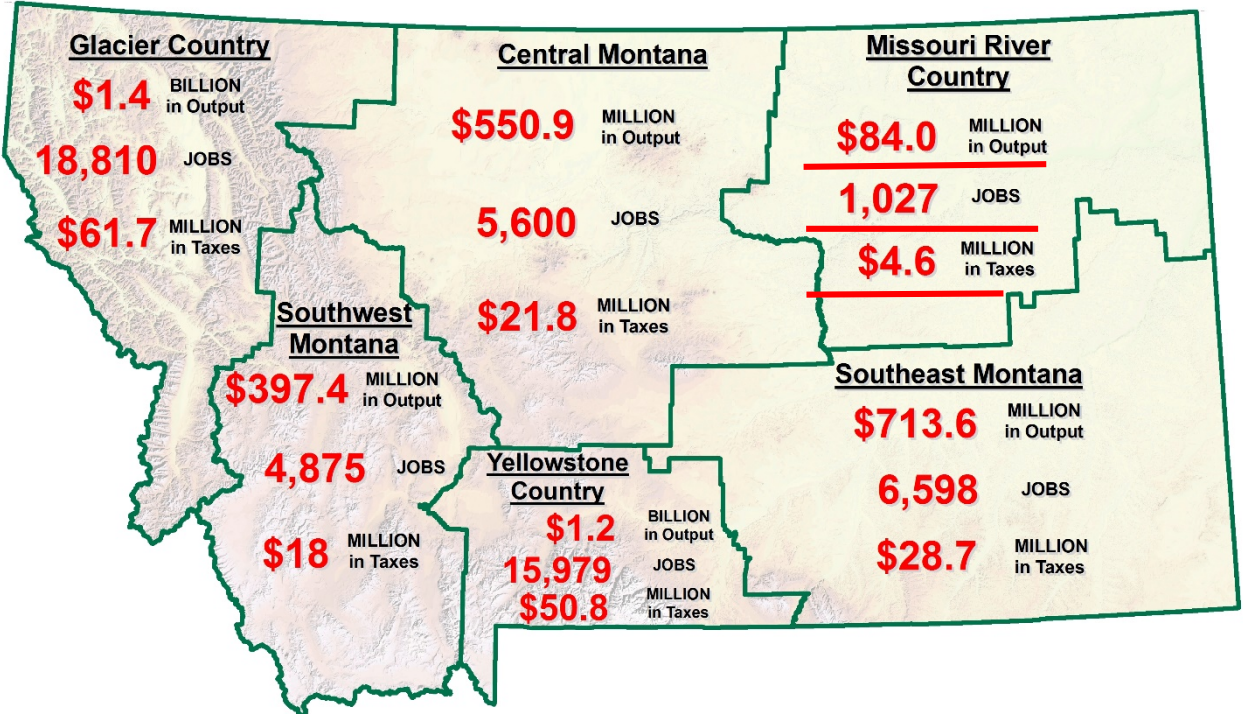


- Attractions
- Perceptions
- Amenity Quality

Demand Shift Has Two Conceptual Pieces

Expanding the Stay of Current Visitors

Inducing New Visitors to the Region

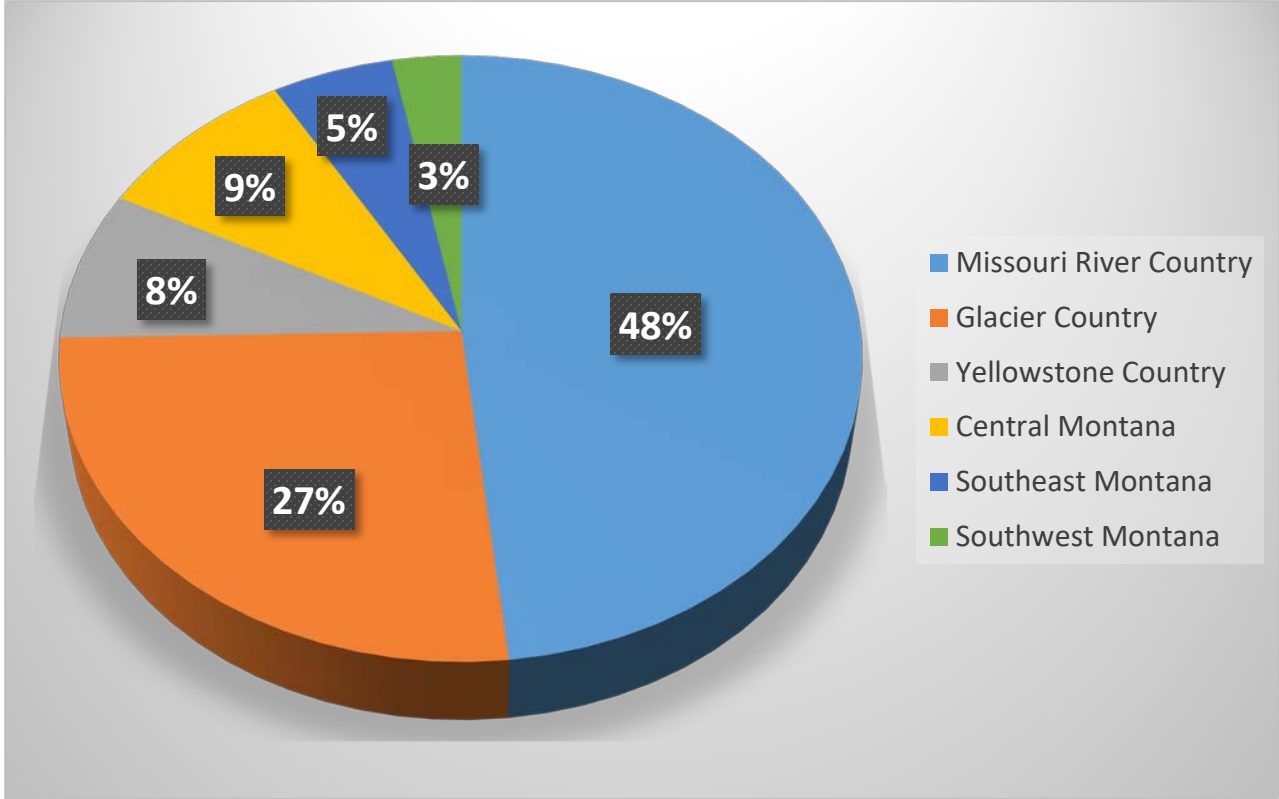


Who Are the Current Visitors?

Nonresident Annual Survey

| U.S. Visitors | |
|---------------|-----|
| Washington | 13% |
| North Dakota | 11% |
| Minnesota | 11% |
| Idaho | 7% |
| Colorado | 5% |
| Michigan | 5% |
| Wisconsin | 4% |
| Wyoming | 4% |
| Florida | 4% |
| Oregon | 3% |

2014-2016 Average



2014-2016 Average

Who Are the Current Visitors?

Nonresident Annual Survey

Top 10 Sites Visited

| | |
|---|------------|
| Glacier National Park | 63% |
| Fort Peck Lake | 29% |
| Yellowstone | 27% |
| Fort Peck Interpretive Center & Museum | 15% |
| Other Montana State Parks | 14% |
| C.M. Russell National Wildlife Refuge | 11% |
| Little Bighorn Battlefield | 10% |
| Flathead Lake State Parks | 9% |
| Pompey's Pillar | 7% |
| Virginia/Nevada City | 3% |

2014-2016 Average

Top 10 Activities

| | |
|---|------------|
| Scenic Driving | 64% |
| Nature Photography | 47% |
| Car/RV Camping | 43% |
| Wildlife Watching | 37% |
| Day Hiking | 36% |
| Recreational Shopping | 26% |
| Visiting other Historical Sites | 25% |
| Visiting Museums | 19% |
| Visiting Lewis & Clark Sites | 18% |
| Birding | 9% |

2014-2016 Average

Attractions to the Region

Top Outdoor Recreation -Panelists

Nonresidents

- Hiking
- Sightseeing
- Camping
- Fishing
- Wildlife Viewing

Residents

- Fishing
- Sightseeing
- Hunting
- Hiking
- Camping

Attractions to the Region

Events

Surveys
Distributed
at Events
in
Northeast
Montana

Fort Peck Summer Theatre

Malta-First State Bank Car Show/Dino Days/PCMS Races

Fort Peck-Montana Governor's Cup Walleye Tournament

Wolf Point Wild Horse Stampede and Parade

Glasgow NE MT Fair, Concert, Rodeo & Derby

Sidney-Richland County Fair & Rodeo



Attractions to the Region Events

What Do
We know
about the
Attendees
Surveyed?

74% were Montanans; 58% of whom were from within Missouri River Country.

72% were in the region primarily to attend the event.

Nonresidents who spent nights, spent 5.6 nights away from home. Residents spent 3.9.

Combined, 93% of the nights were spent within the area of the event.



Attractions to the Region Events

What Do
We know
about
where the
Surveyed
Attendees
Stayed?

Private Campground – 27%

Home of a Friend or Relative – 24%

Hotel/Motel/B&B – 21%

Public Lands Camping – 17%

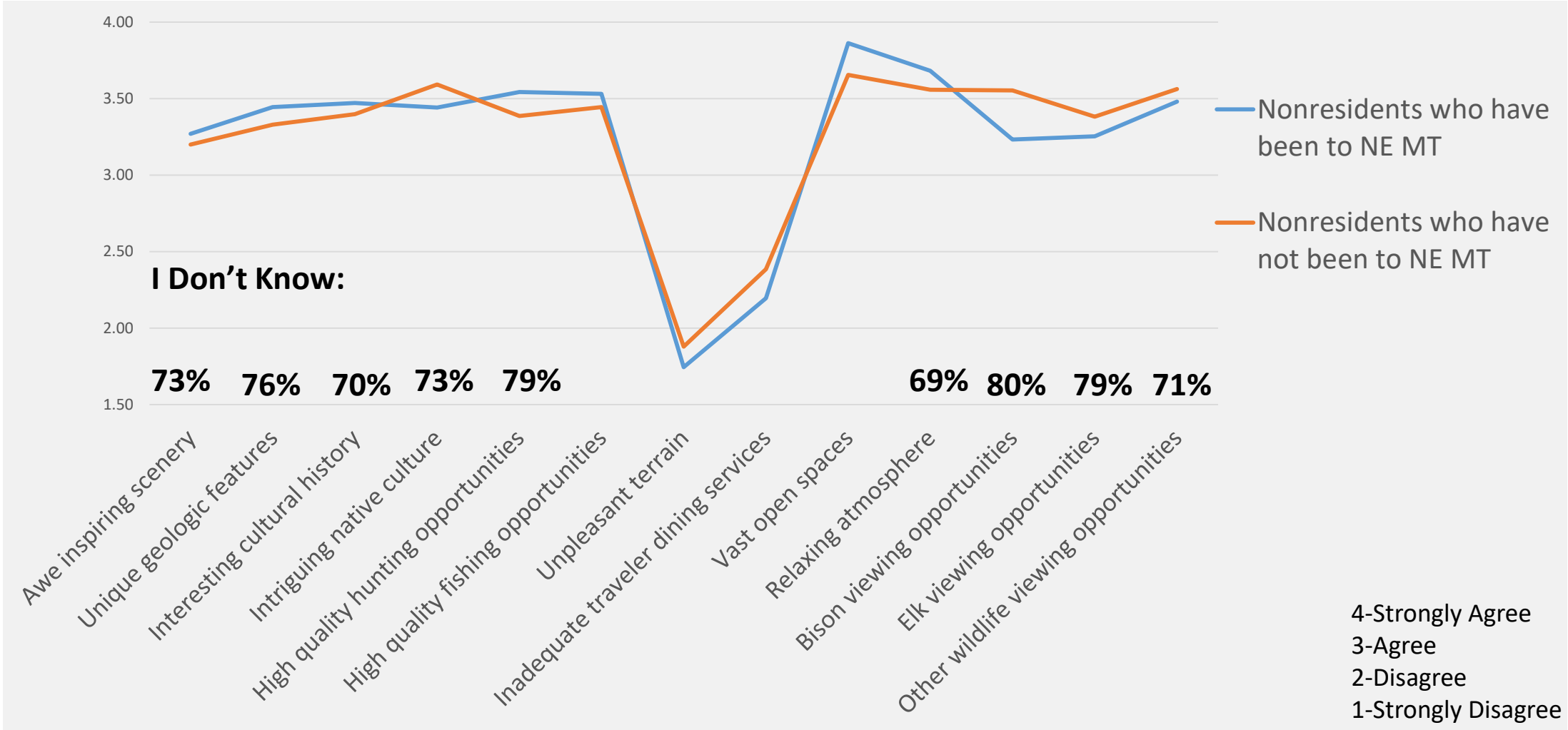
Second Home/Cabin/Condo – 6%

Vehicle in a Parking Lot – 3%

Guest Ranch – 1%

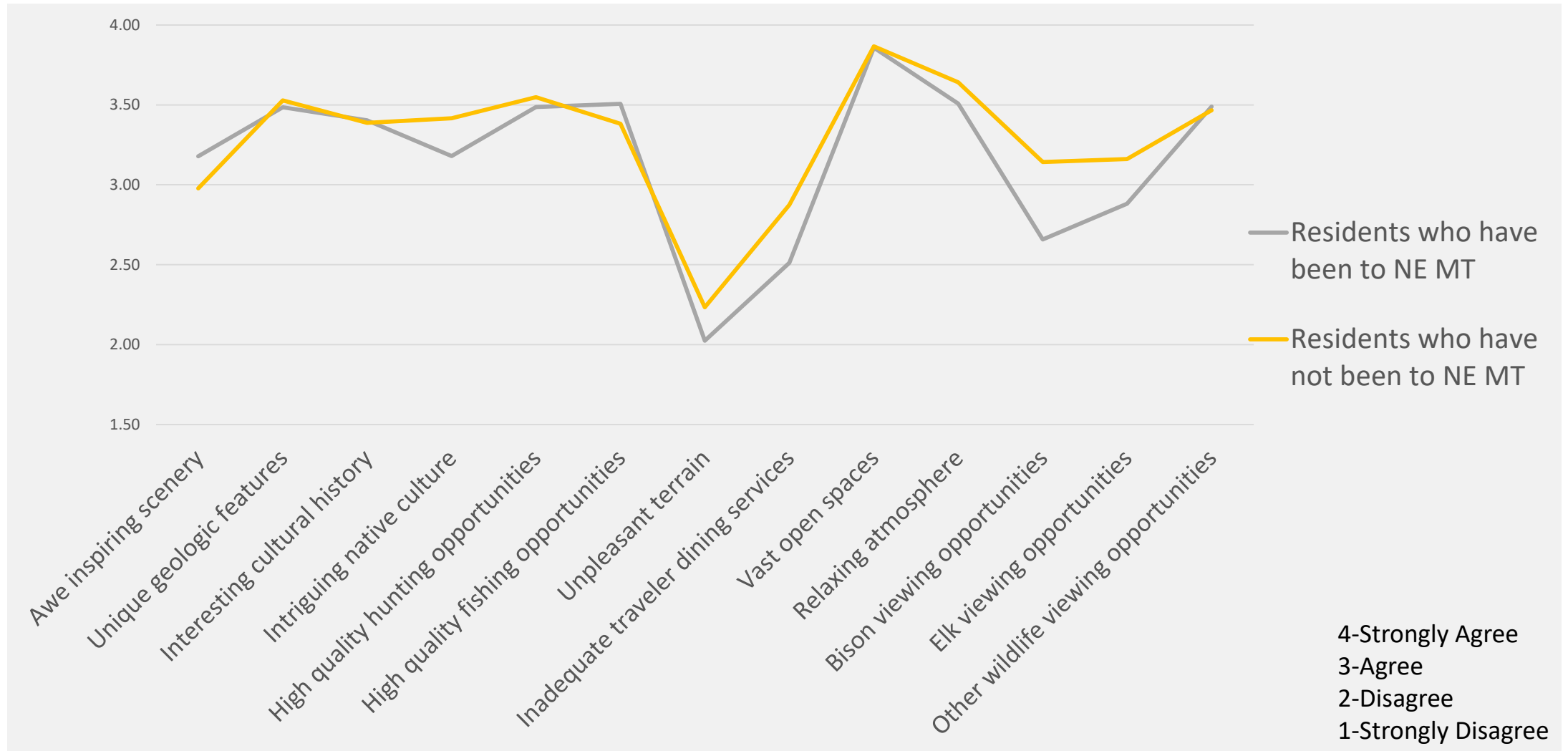


Perceptions of Northeast Montana

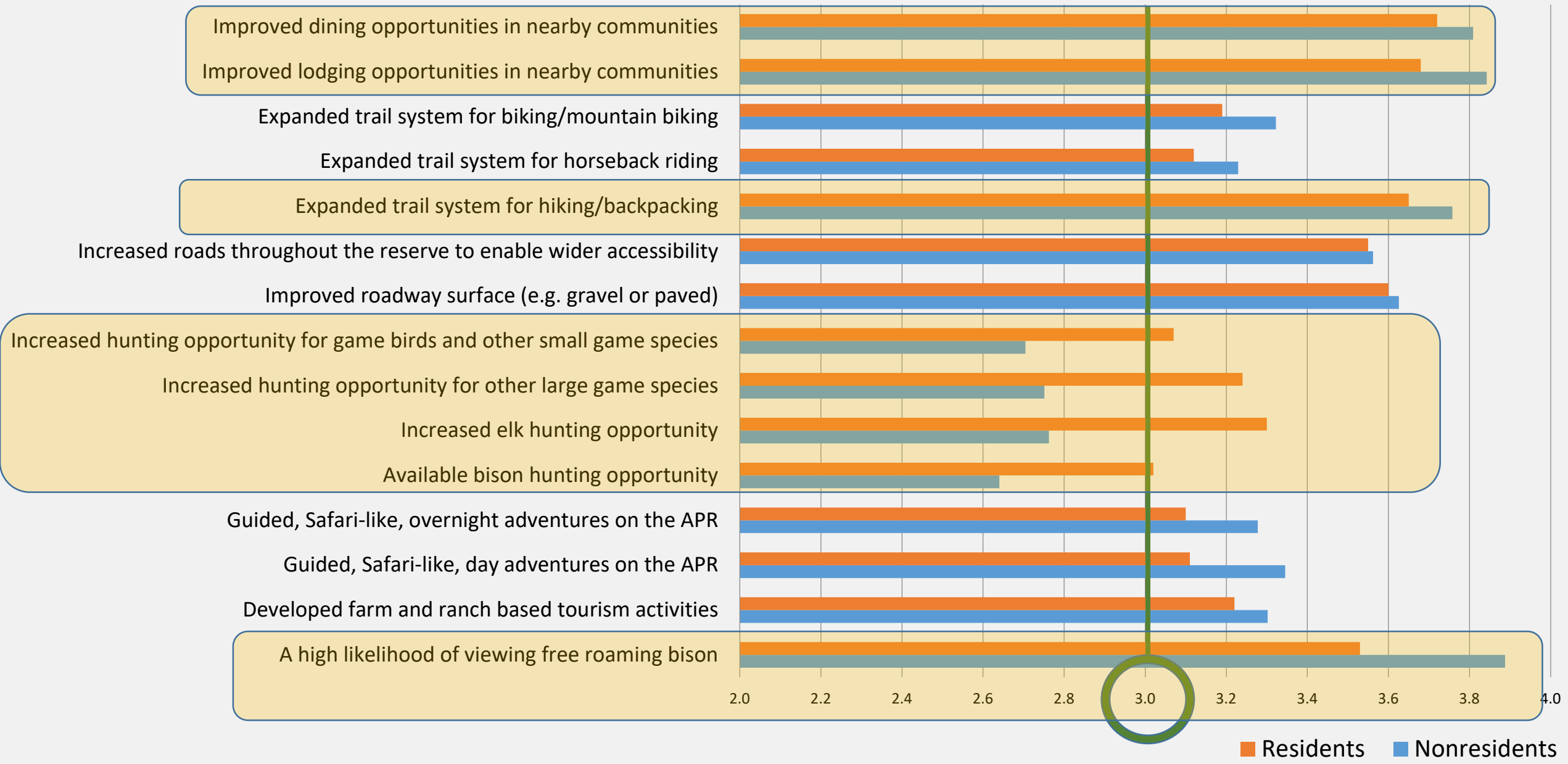


Northeast Montana has...

Perceptions of Northeast Montana

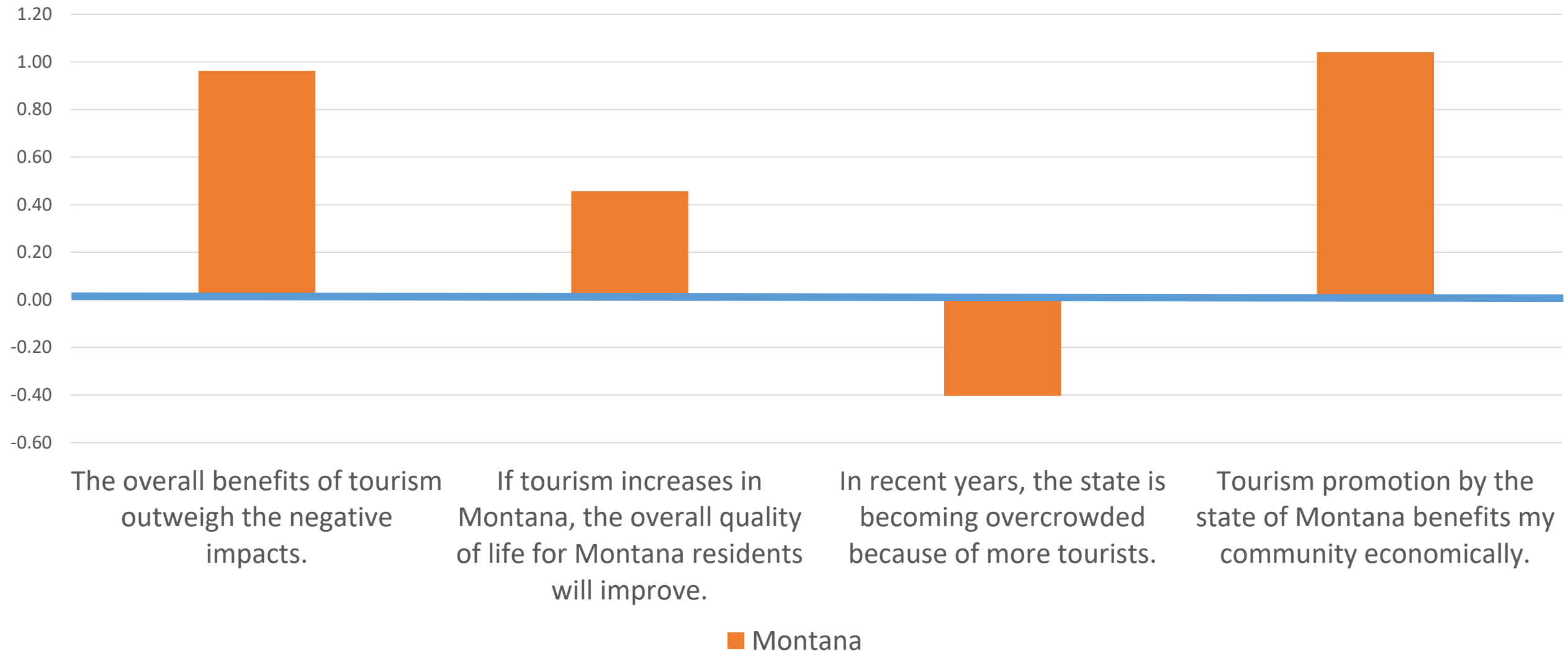


Northeast Montana has...

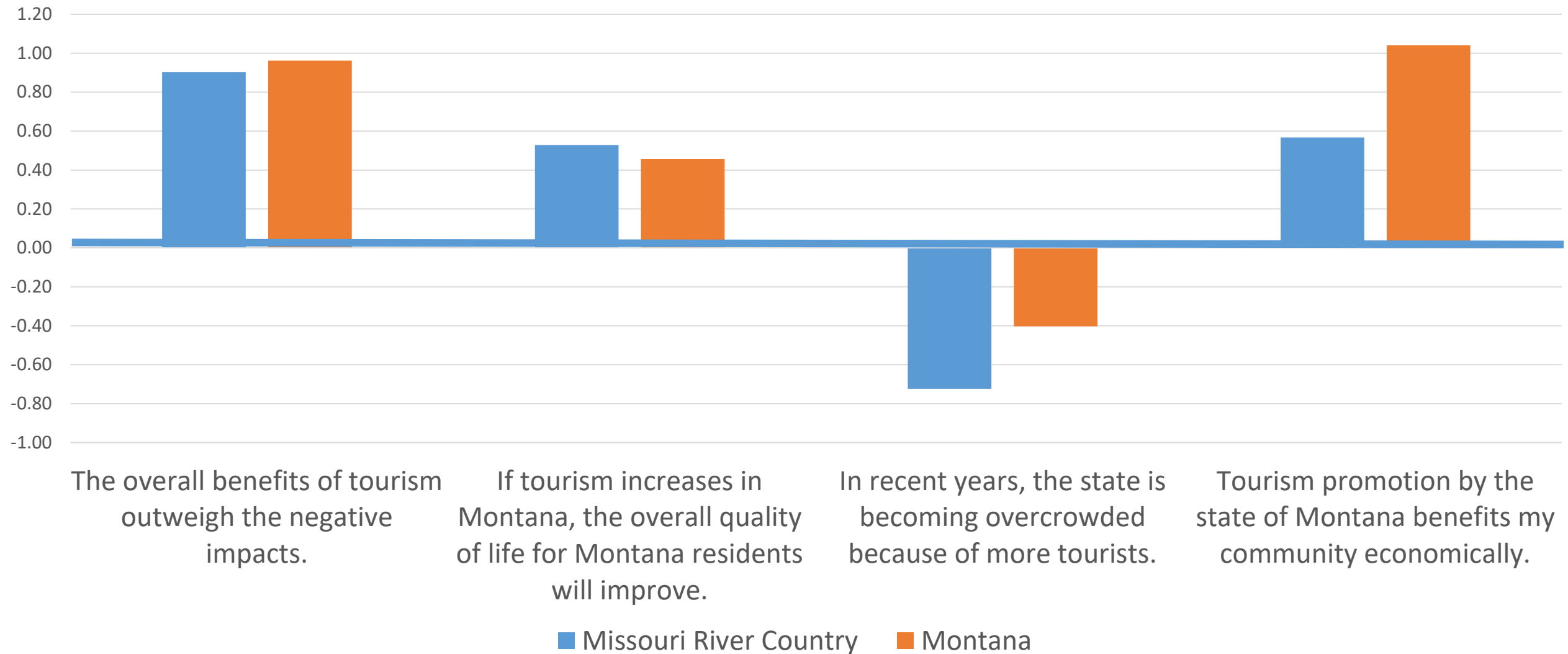


Would you be more or less likely to visit northeast Montana if there was...

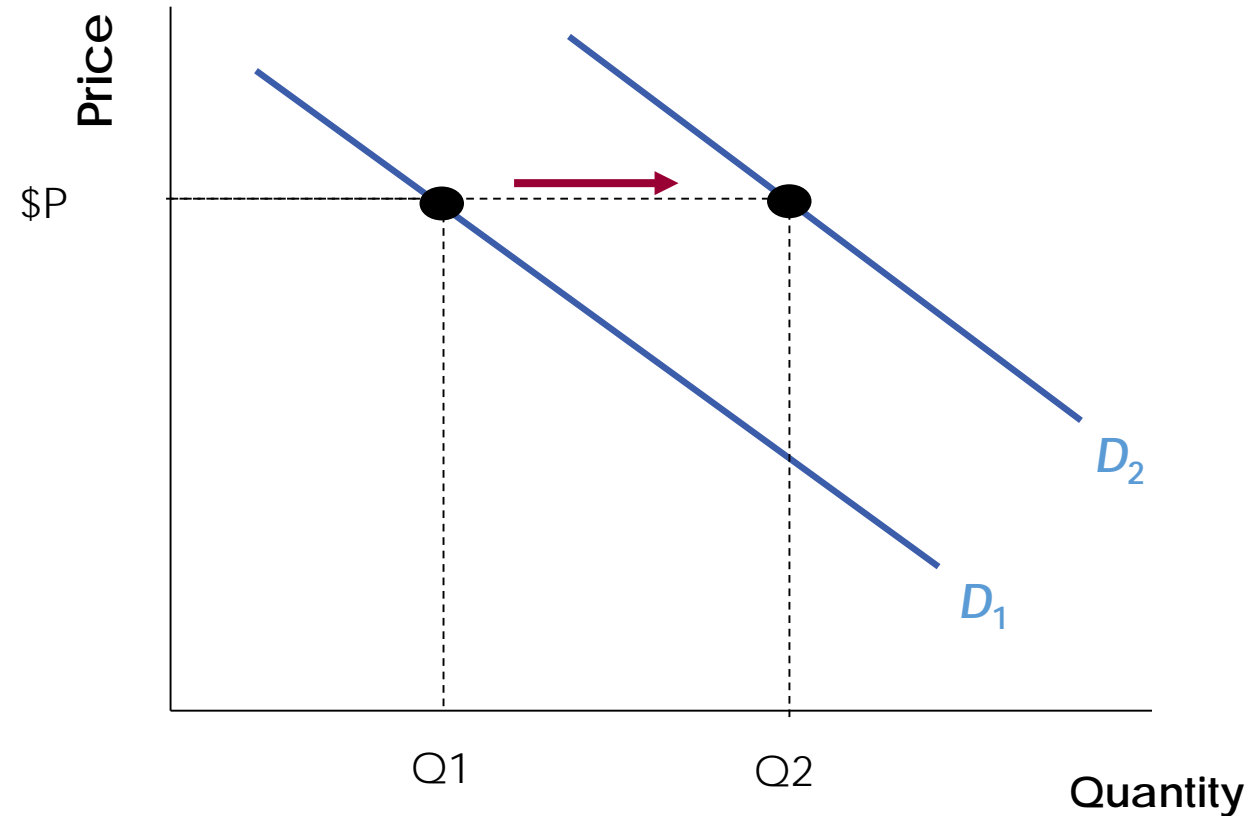
Residents' Attitudes Towards Tourism



Residents' Attitudes Towards Tourism



Why are These Perceptions, Attractions, and Amenity Qualities Important?



With more information about the region, respondents indicate a higher willingness to visit and extend visit length.

Working to shift the demand curve right!

- By many accounts, northeast Montana, like many traditionally agricultural regions of the US, is struggling.
- Tourism is by no means a cure-all, but latent demand exists.
- Satisfying the latent demand requires an increase in the awareness of the attractions available and strategically seeking to improve upon both the built and natural amenities.
 - In travel, perception is reality.
 - Addressing this likely requires a collaborative effort between conservation oriented groups, tourism interests and the community at large.



Thank you!

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Nonresident Activities

Kara Grau



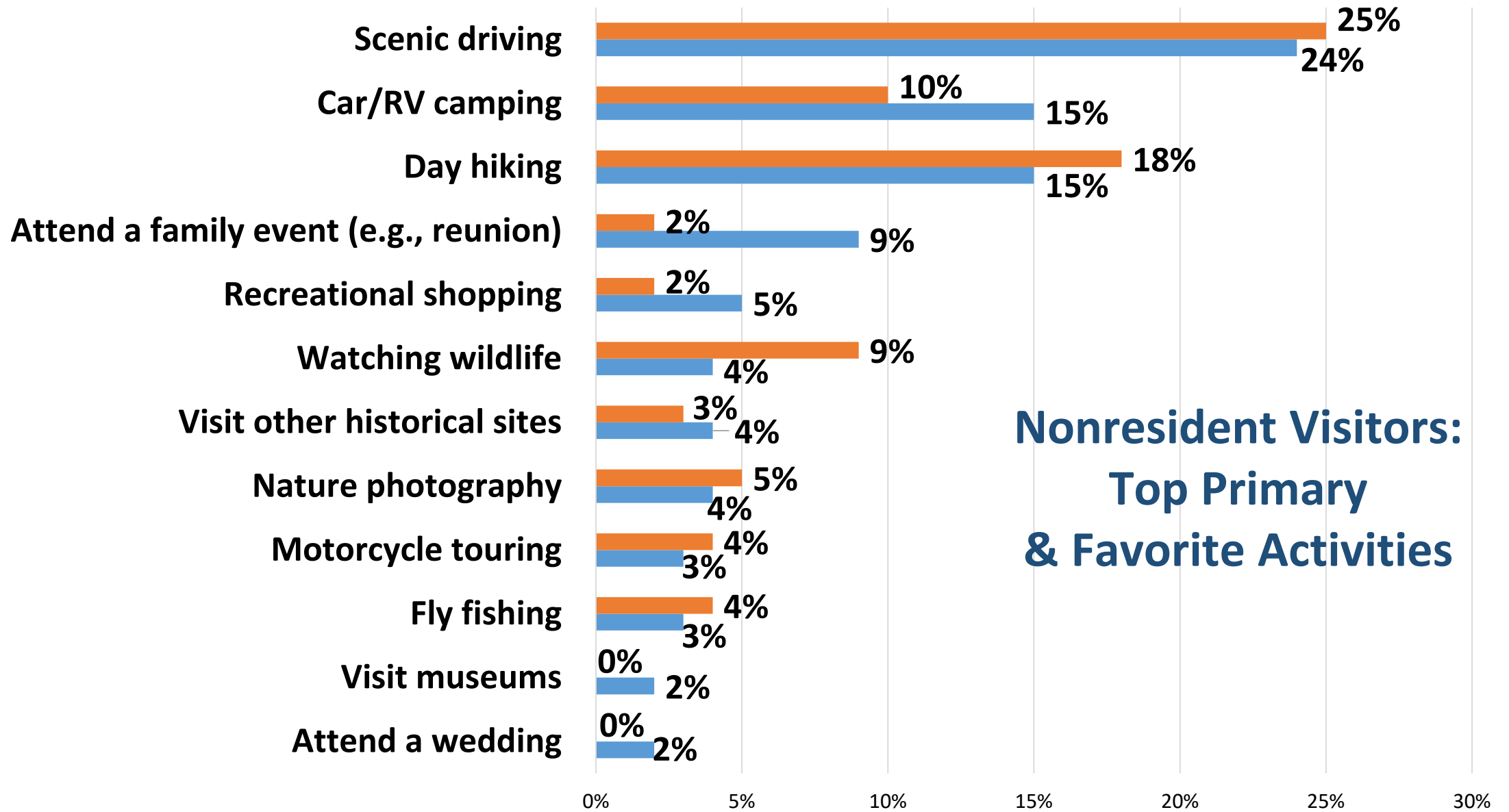
Quarter 3, 2016 Nonresident Activities

We asked...

“Of all the activities you did on your trip, what was your primary activity?”

We also asked, “What was your favorite activity?”

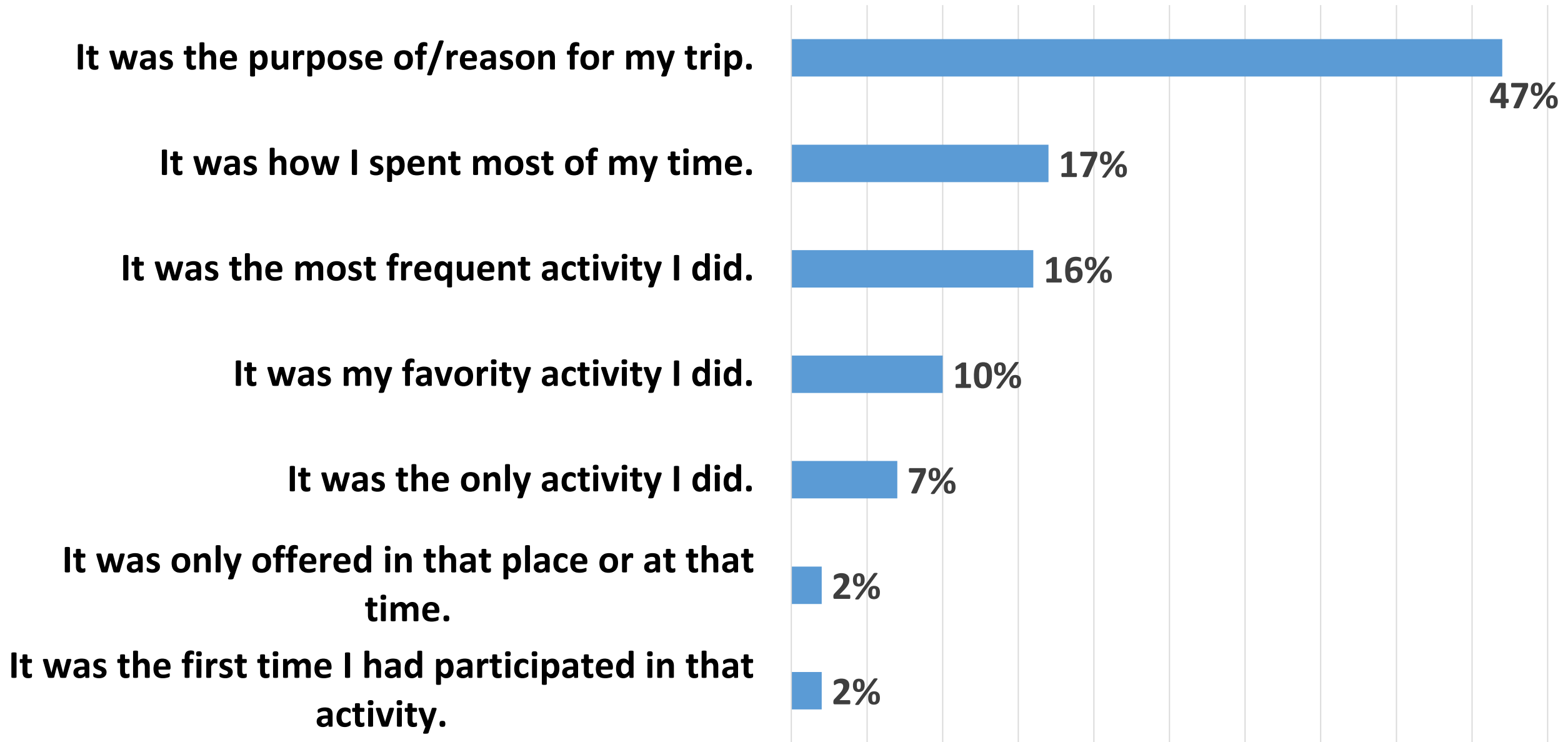




**Nonresident Visitors:
Top Primary
& Favorite Activities**

Favorite Primary

What made it your primary activity?



Example:

If primary activity was purpose of your trip, what was the activity?

20% Attend family event

16% Scenic driving

16% Car/RV camping

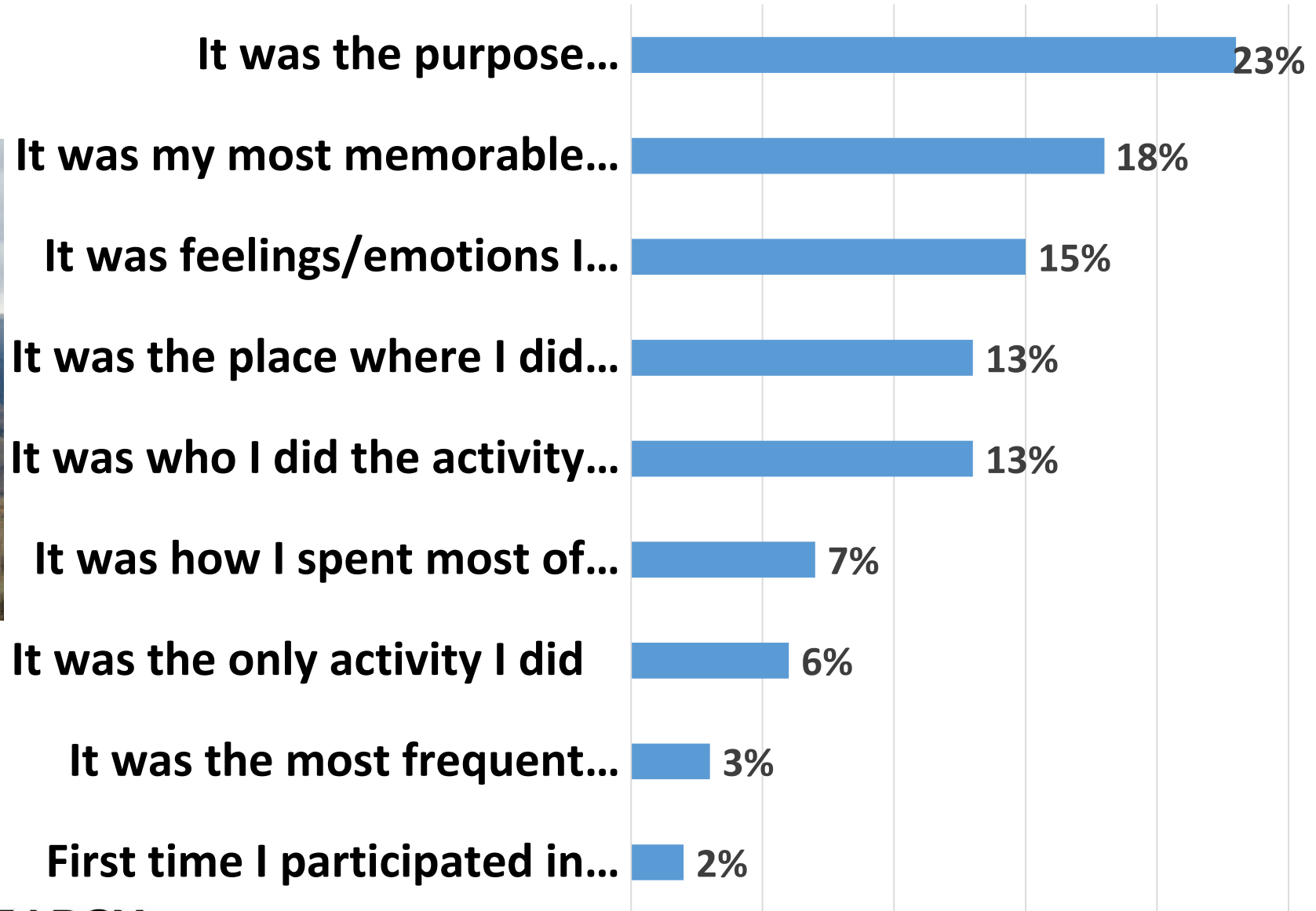
10% Day hiking

6% Attend a wedding

5% Motorcycle touring



Why was it your favorite activity?



Example:

If favorite activity was because it was most memorable activity, what was the activity?

27% Scenic driving

19% Day hiking

15% Watching wildlife

5% Nature Photography

4% Fly fishing

3% River rafting/floating



Example:

If favorite activity was because it was the place, what was the activity?

42% Day hiking

7% Fly fishing

6% Nature photography

6% Golfing

6% Scenic driving

5% Canoe/kayaking

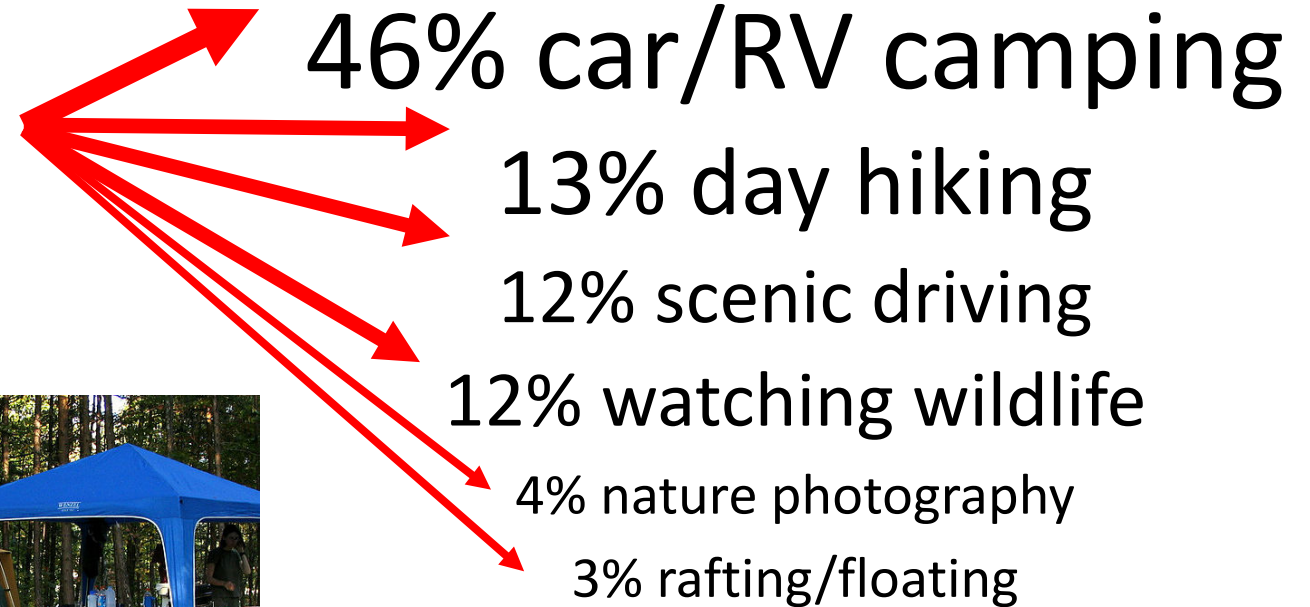
5% Horseback riding



**If Primary Activity
was**

**Then...Favorite Activity
was**

Car/RV camping



**If Primary Activity
was**

**Then...Favorite Activity
was**

Attend a Family Event

23% Attend Family Event

18% Car/RV Camping

18% Scenic Driving

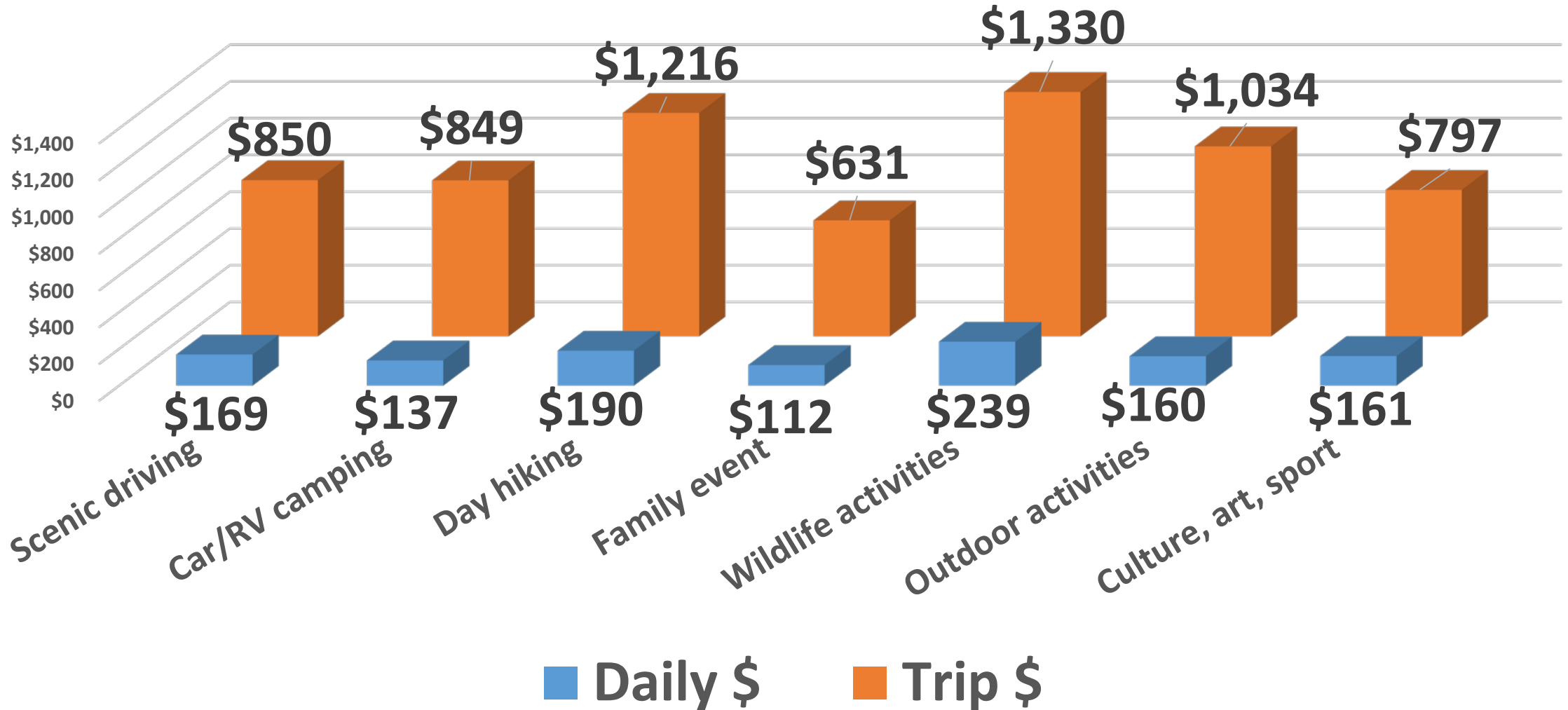
8% Day hiking

6%rafting/floating

4% other fishing or watching wildlife



Daily & Trip Spending by Primary Activity



Be watching for these quarterly activity reports coming your way from ITRR.



Thank you!
Questions?

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