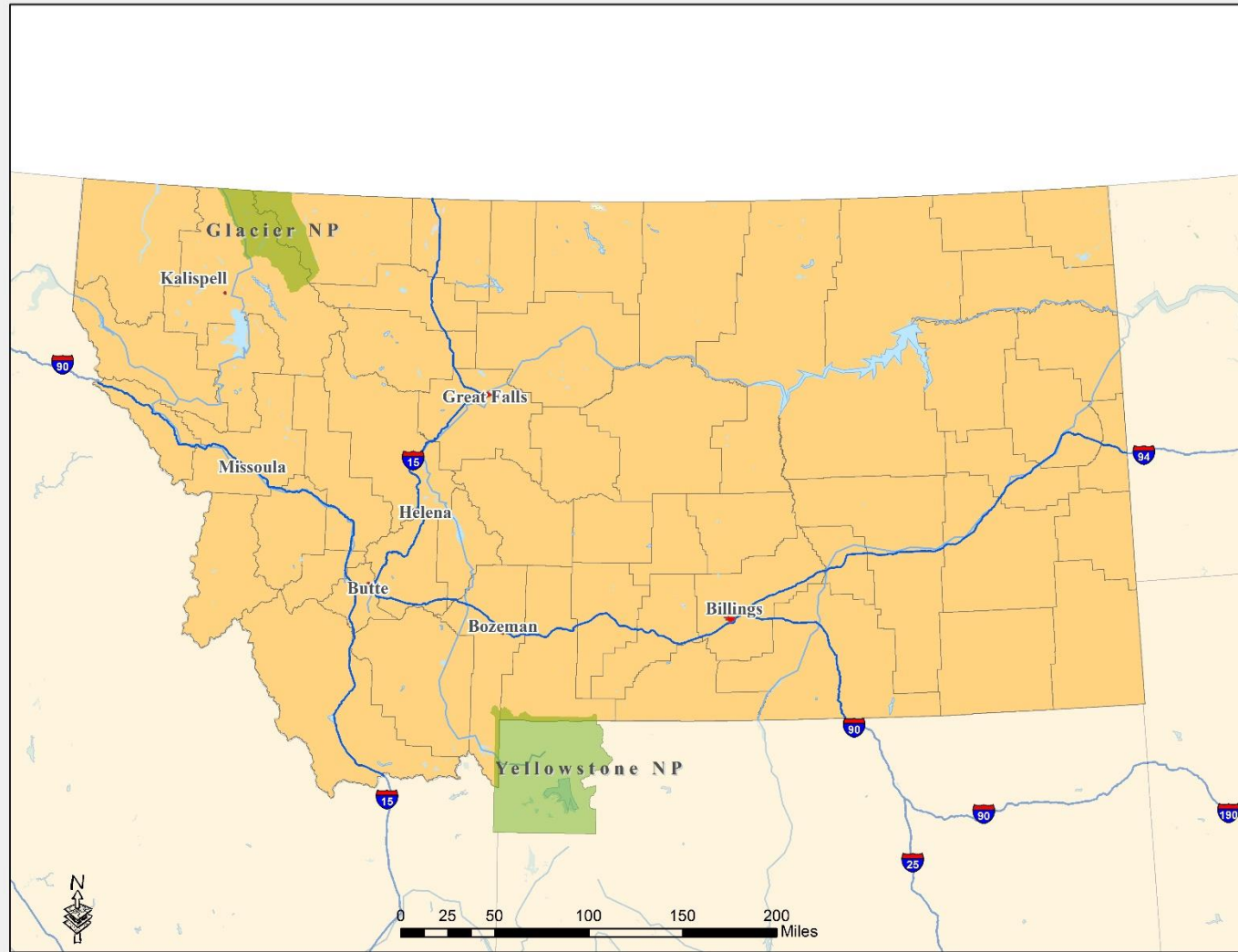


# Yellowstone National Park Regional Economic and Transportation Analysis



INSTITUTE FOR  
**TOURISM & RECREATION RESEARCH**  
UNIVERSITY OF MONTANA

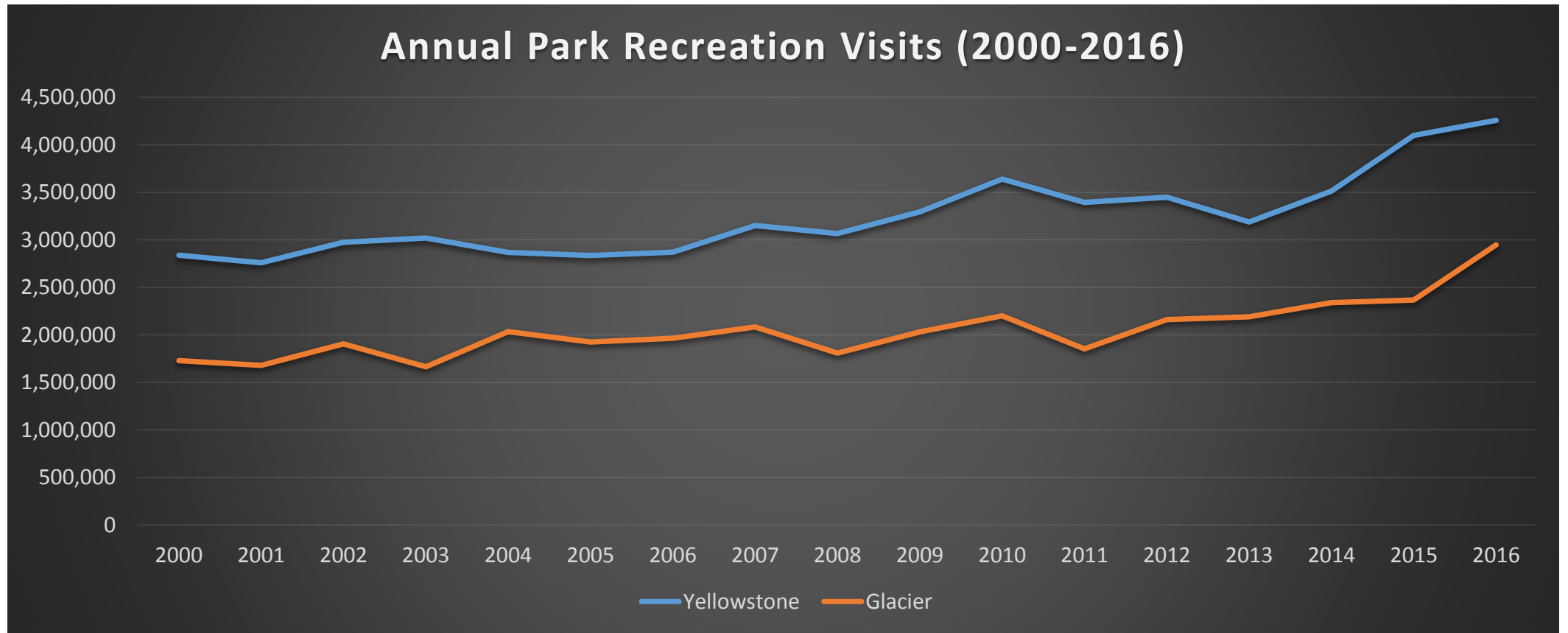
**Jeremy Sage, Ph.D.**

**Economist & Associate Director**

2<sup>nd</sup> TRB Conference on Transportation Needs  
of National Parks and Public Lands

September 11-13, 2017

# Yellowstone and Glacier National Parks







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## 2016 National Park Visitor Spending Effects

*Economic Contributions to Local Communities, States,  
and the Nation*

Natural Resource Report NPS/NRSS/EQD/NRR—2017/1421



### The Basics:

- Economic contribution;
- Visitor spending in gateway communities -- 60 miles of a park;
- Statewide contribution

*“The 60-mile radius method results in some relatively large local gateway regions, especially in some western states where counties are large. Because of this, there is the potential for including some areas that are not intrinsically linked to the local economies surrounding each park. Efforts are underway to improve local gateway region definitions.”*



Example form from NPS Visitor Study at:  
*Grant-Kohrs Ranch National Historic Site*

19. For your personal group, please estimate all expenditures for the items listed below for this visit to Grant-Kohrs Ranch NHS and the surrounding area (within 50 miles of the park). **Please write "0" if no money was spent in a particular category.**

a) Please list your personal group's total expenditures inside Grant-Kohrs Ranch NHS.

b) Please list your personal group's total expenditures in the **surrounding area** outside the park (within 50 miles of the park).

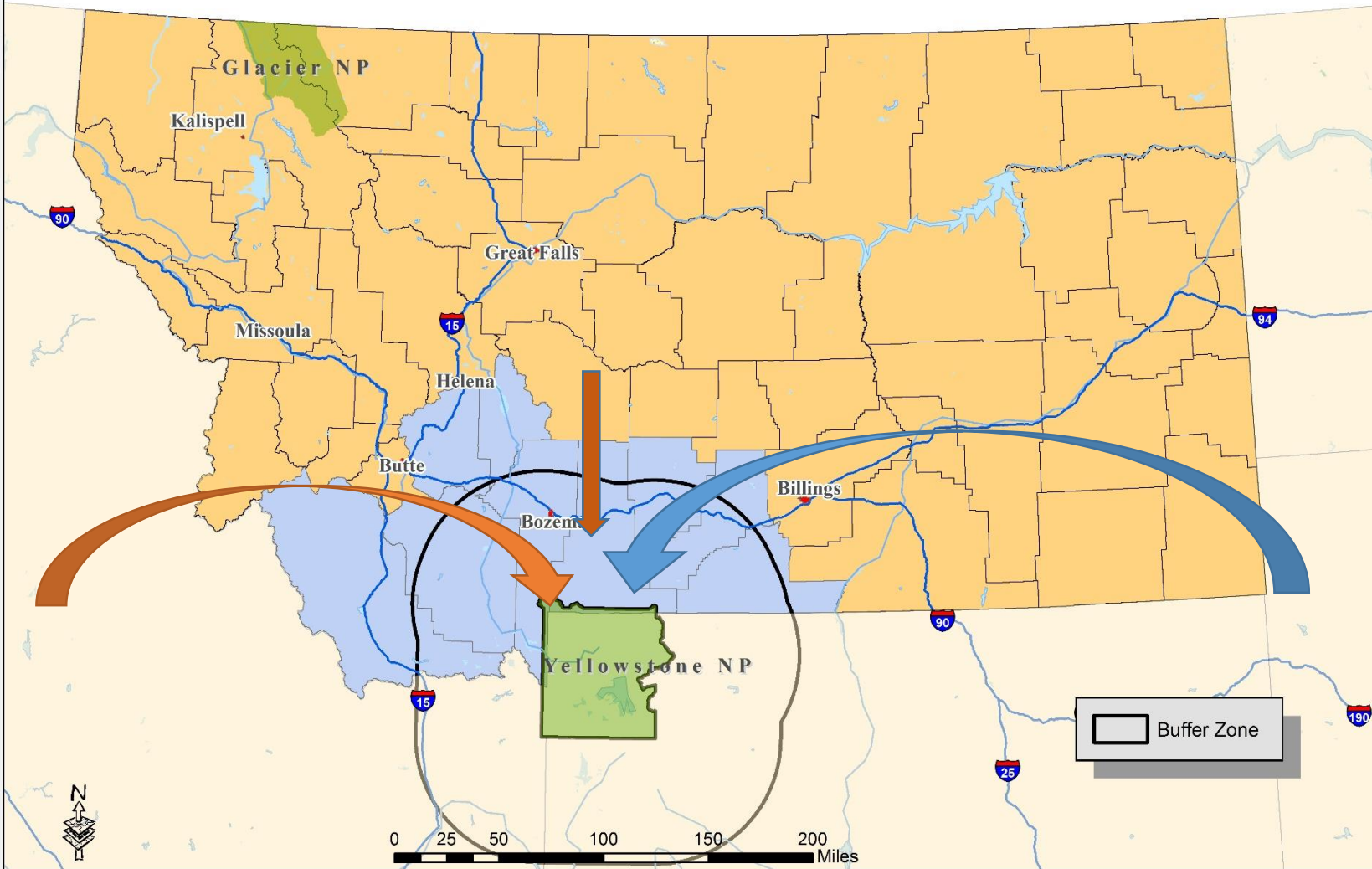
NOTE: Surrounding area residents should only include expenditures that were **just for this trip** to Grant-Kohrs Ranch NHS.

EXPENDITURES		
	a) Inside park	b) Outside park
Spent no money (●)	<input type="radio"/> → Go to (b)	<input type="radio"/> → Go to (c)
Lodge, hotel, motel, cabin, B&B, etc.	n/a	\$ _____
Camping fees and charges	n/a	\$ _____
Guide fees and charges	n/a	\$ _____
Restaurants and bars	n/a	\$ _____
Groceries and takeout food	n/a	\$ _____
Gas and oil (auto, RV, boat, etc.)	n/a	\$ _____
Other transportation expenses (rental cars, taxis, auto repairs, but NOT airfare)	n/a	\$ _____
Admission, recreation, entertainment fees	n/a	\$ _____
All other purchases (souvenirs, books, postcards, sporting goods, clothing, donations, etc.)	\$ _____	\$ _____



Yellowstone National Park  
 60 Mile Buffer

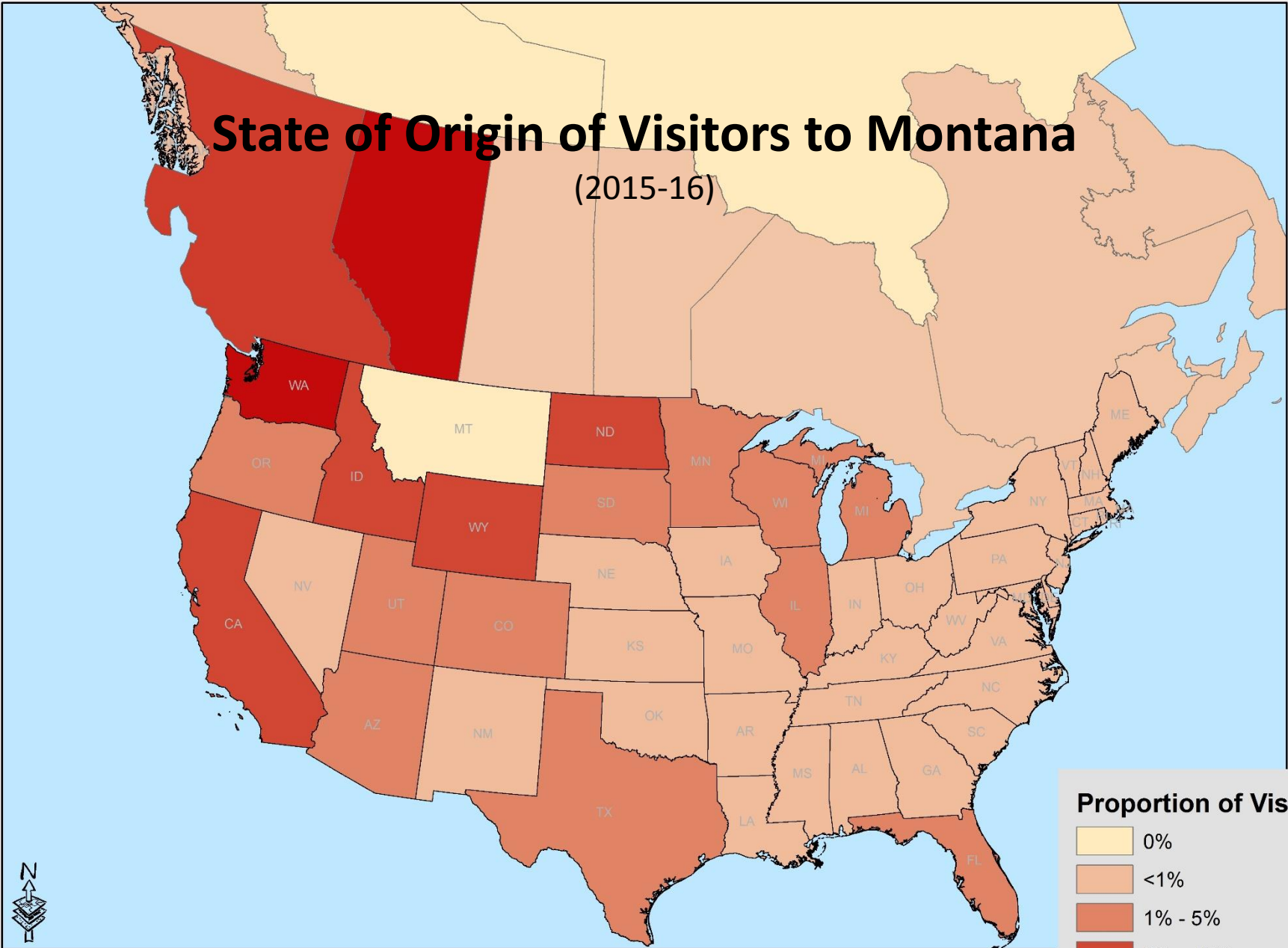
Yellowstone National Park  
60 Mile Buffer





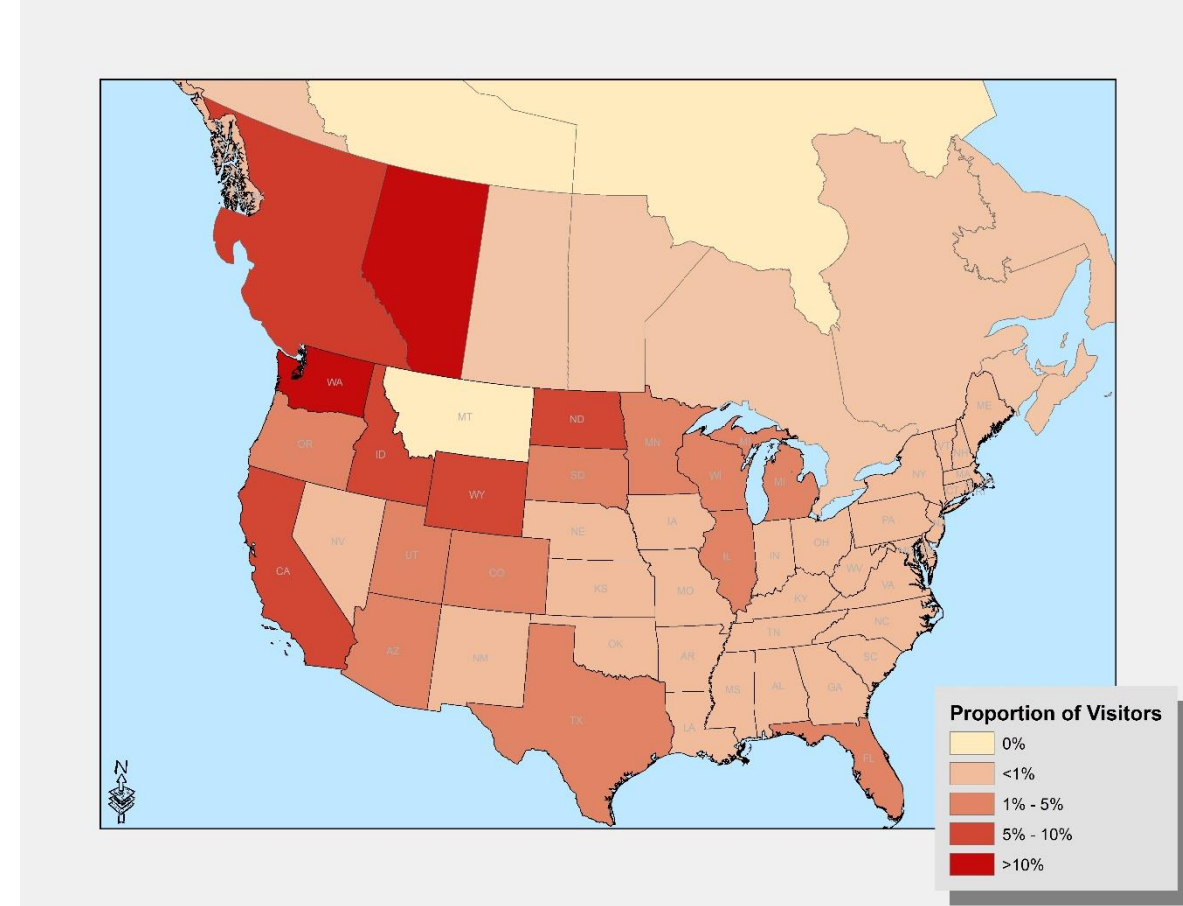
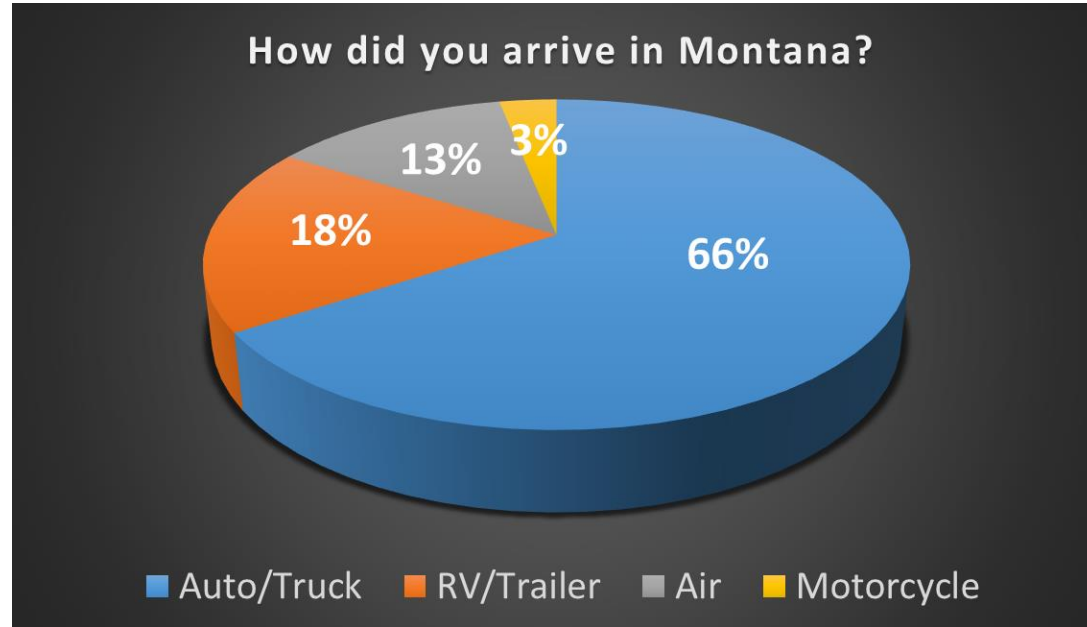
# State of Origin of Visitors to Montana

(2015-16)



### Proportion of Visitors

- 0%
- <1%
- 1% - 5%
- 5% - 10%
- >10%

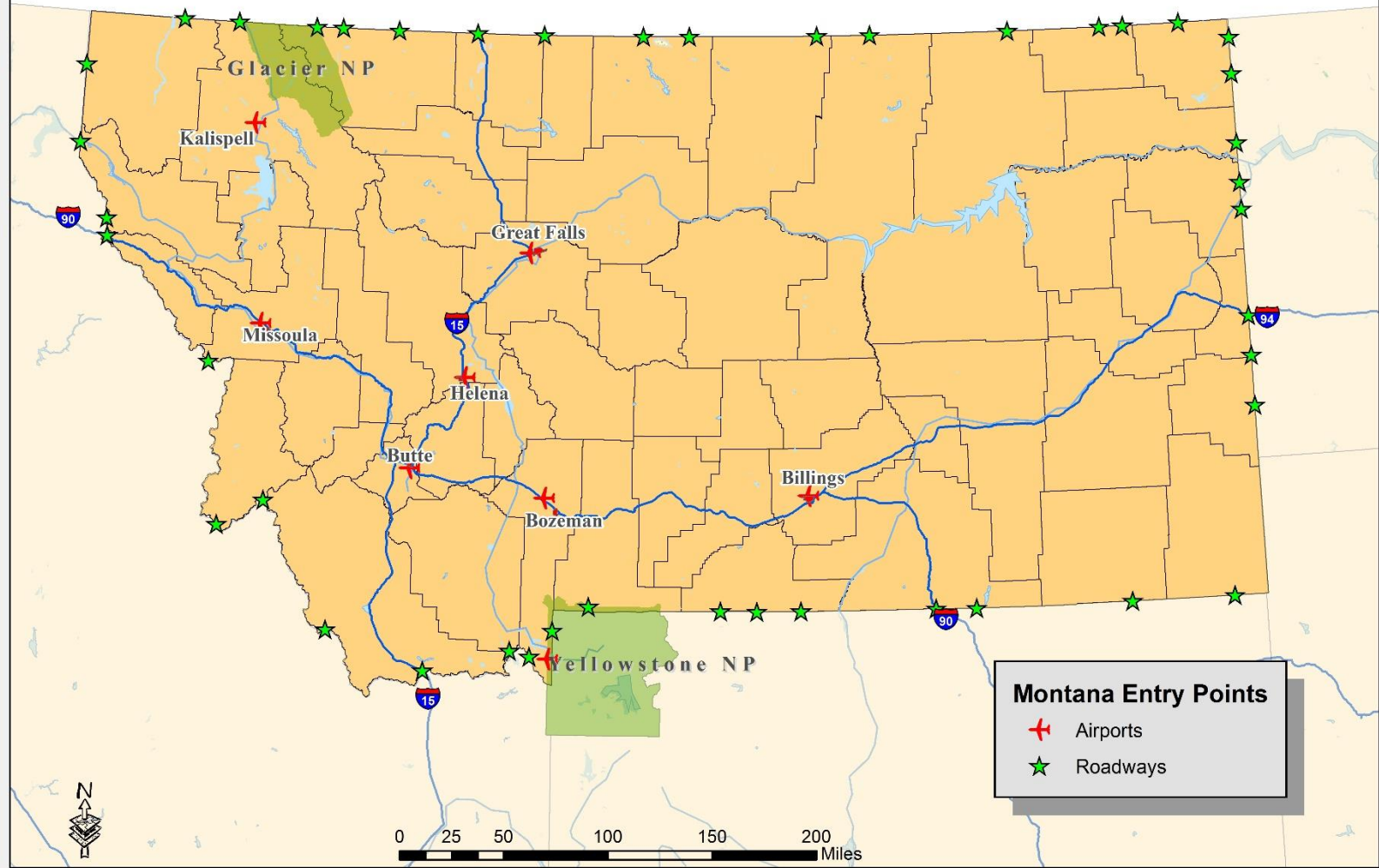


### Where is there value in this information?

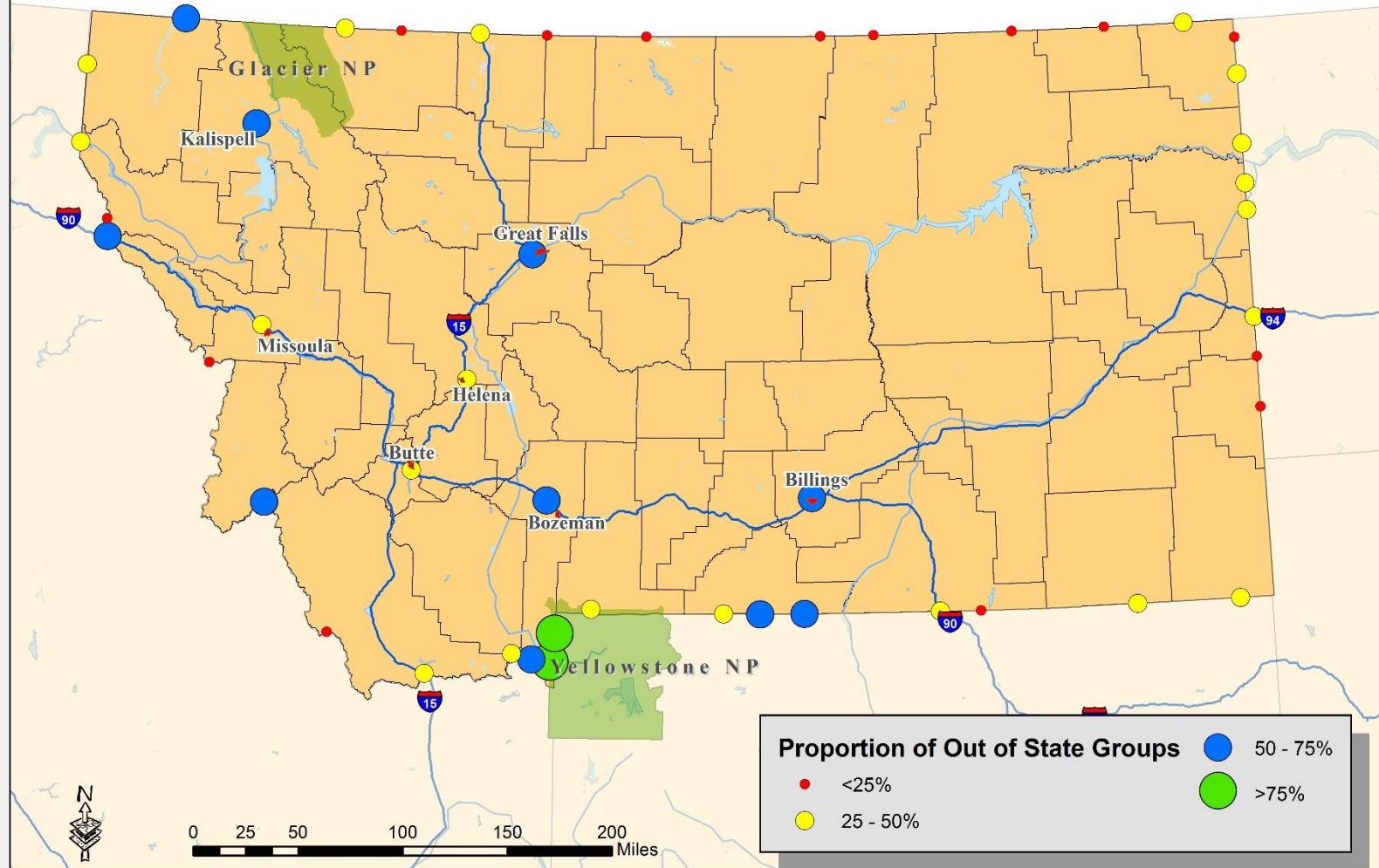
- Marketing and tourism?
- Transportation management?



# Montana Entry Points



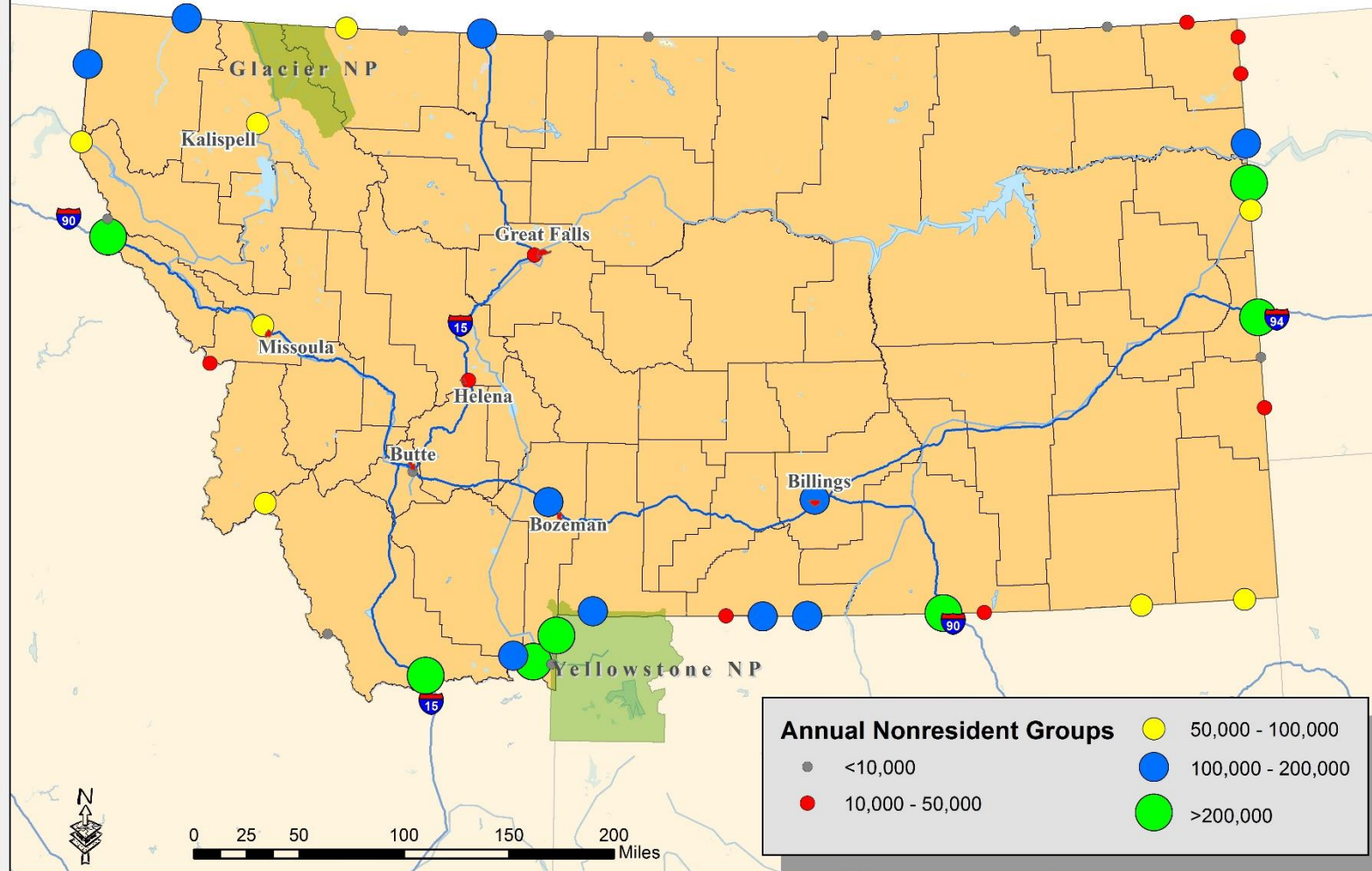
# Montana Entry Points

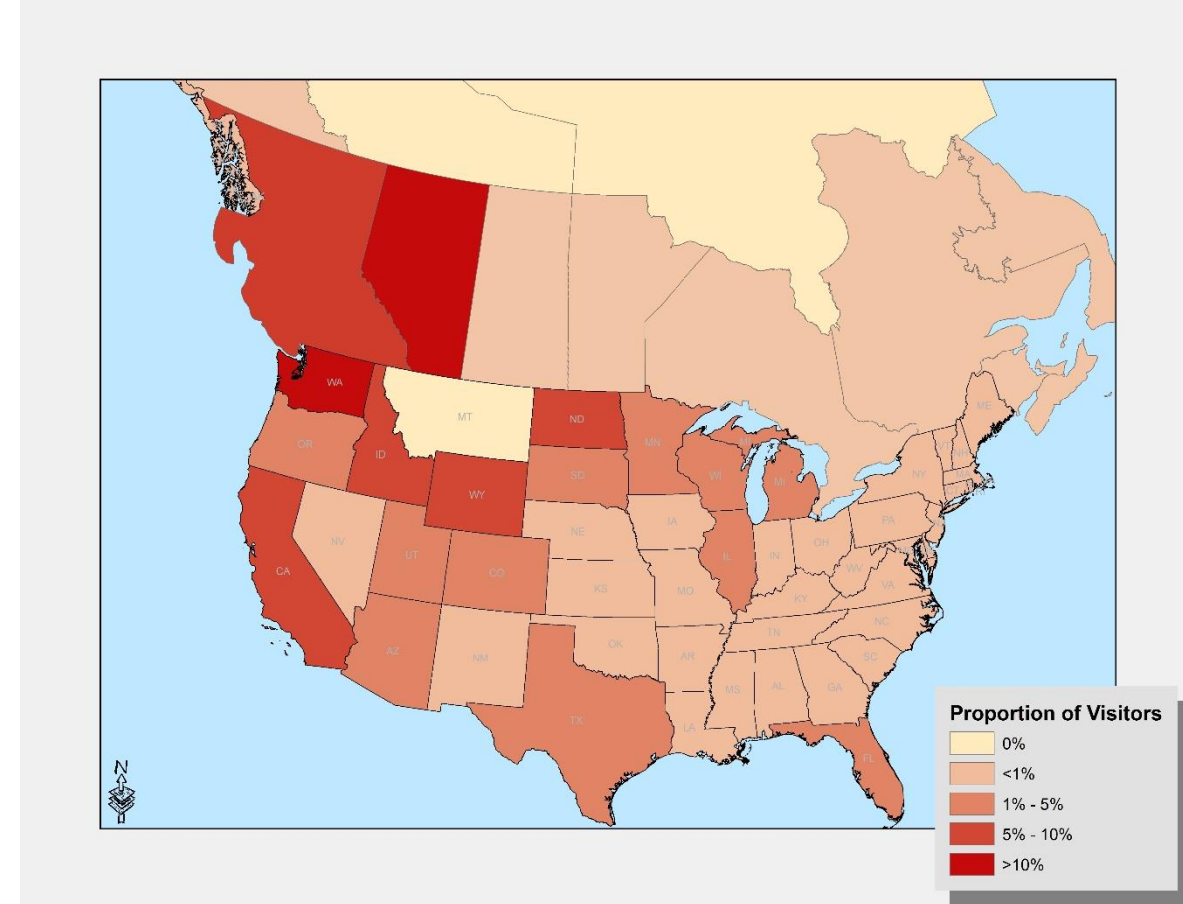
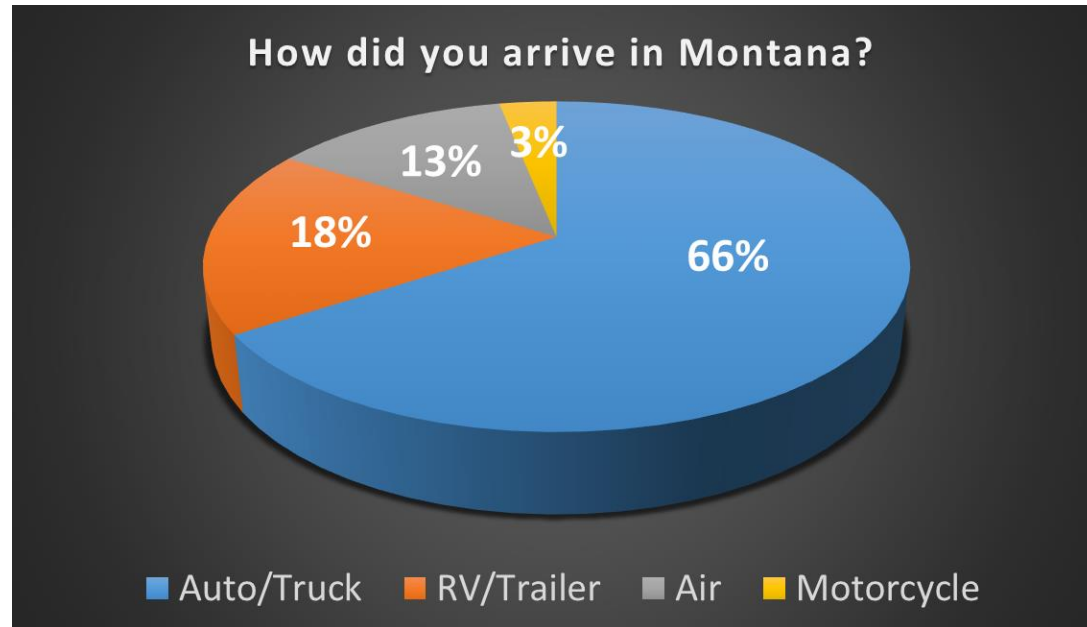




# Montana Entry Points

Total 2015 Groups = 5.3 Million

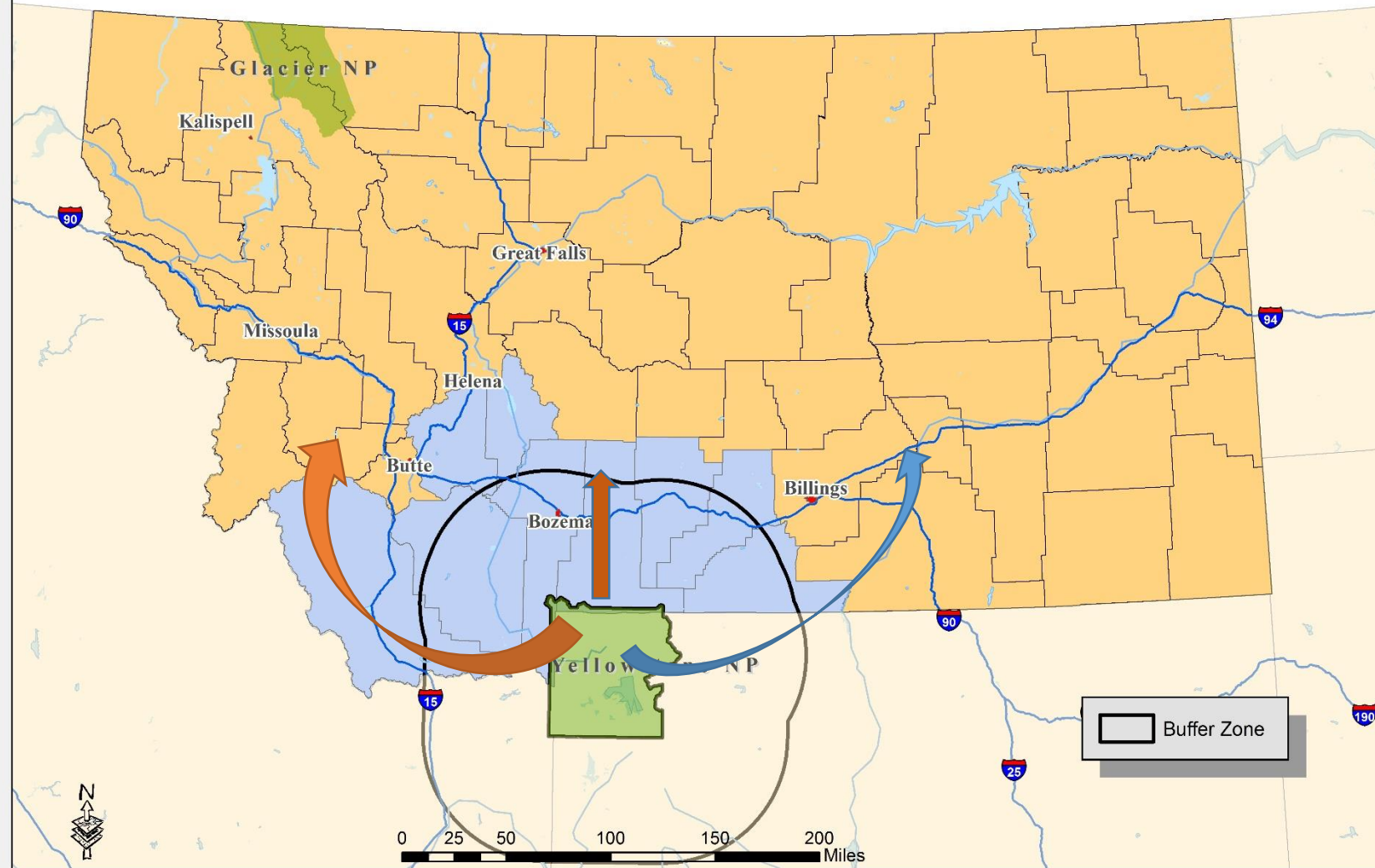




### Where is there value in this information?

- Marketing and tourism?
- Transportation management?
- Land management?
- Community economic development?

## Yellowstone National Park 60 Mile Buffer



- Impact on local economies
- Impact on Roadways
  - Congestion
  - Collisions/Incidents
- Impact on local public lands and other natural amenities

**=> Impact on the management of local resources.**



## Why are visitors coming to Montana?

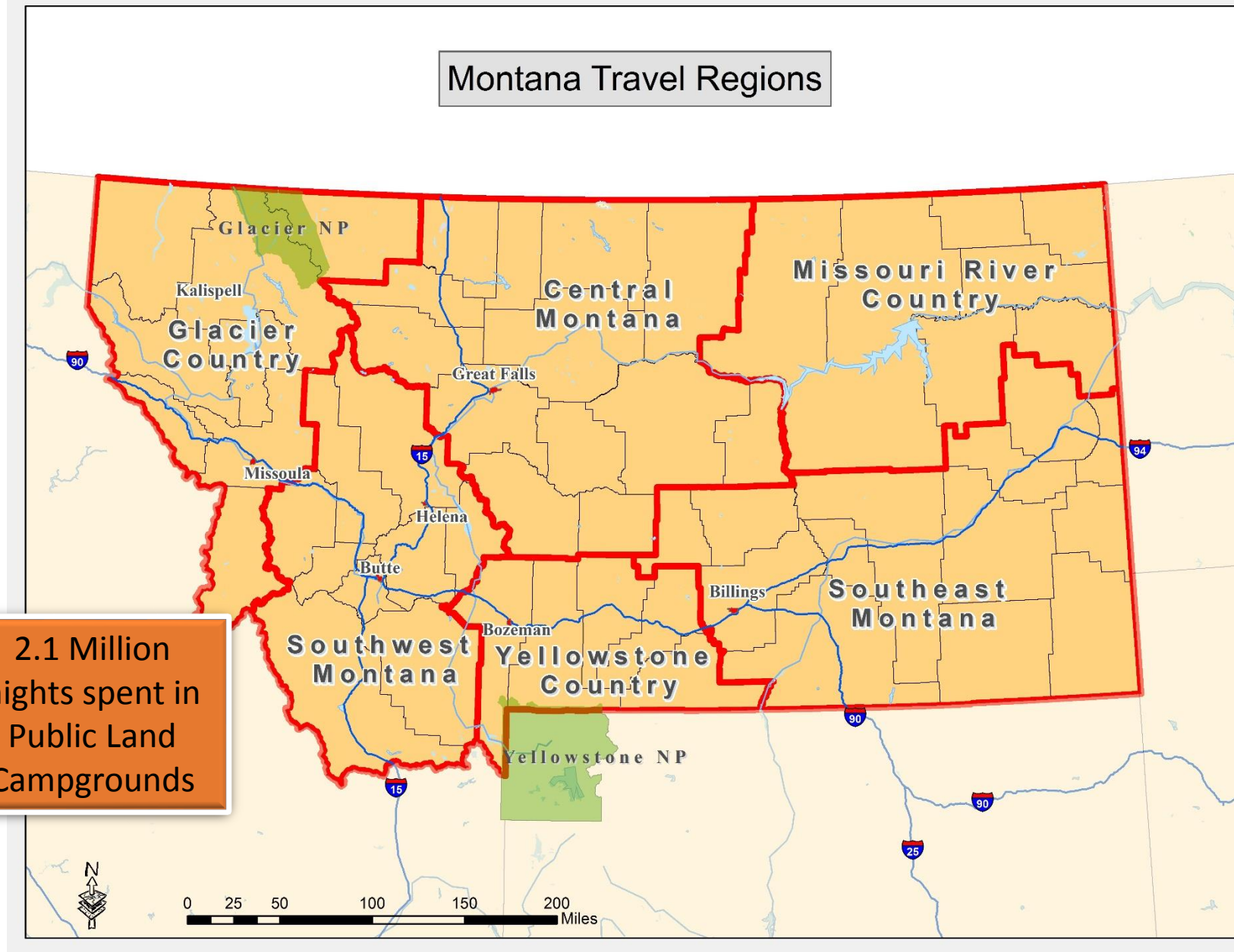
- 35% Vacation/Recreation
- 30% Passing Through
- 18% Visit Friends/Family
- 12% Business
- 5% Other

## Visitors on average stay 4.5 nights?

- 34% In Yellowstone Country
- 34% In Glacier Country
- 12% In Southwest Montana
- 10% In Southeast Montana
- 9% In Central Montana
- 2% In Missouri River Country

- 35% Hotel
- 23% Home of Family/Friend
- 12% Private Campground
- 9% Public Lands Campground
- 21% Other

2.1 Million  
nights spent in  
Public Land  
Campgrounds

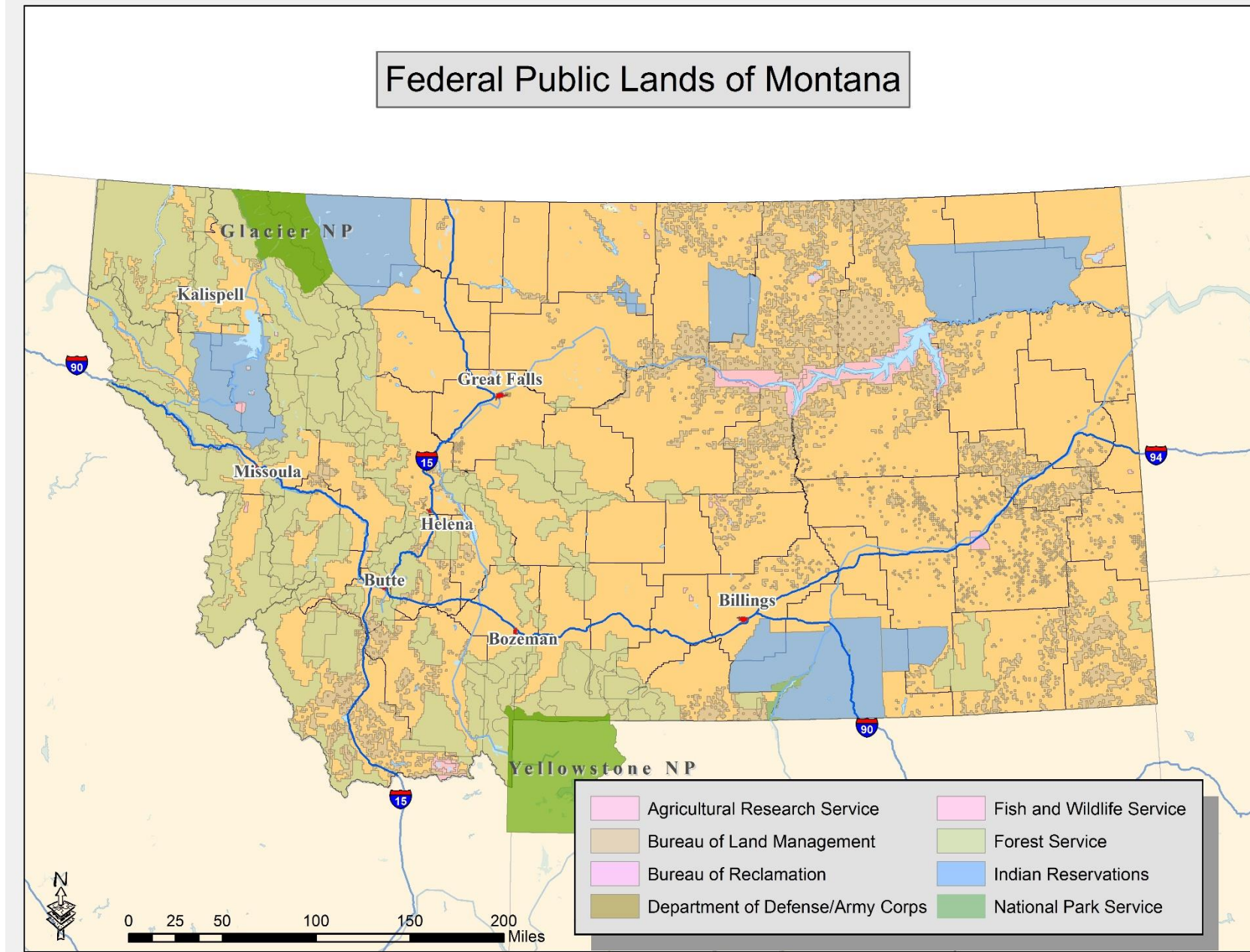


Vacation/Recreation with YNP as main attraction:

- 13% of all nonresident visitors

Visitors on average stay 5 nights?

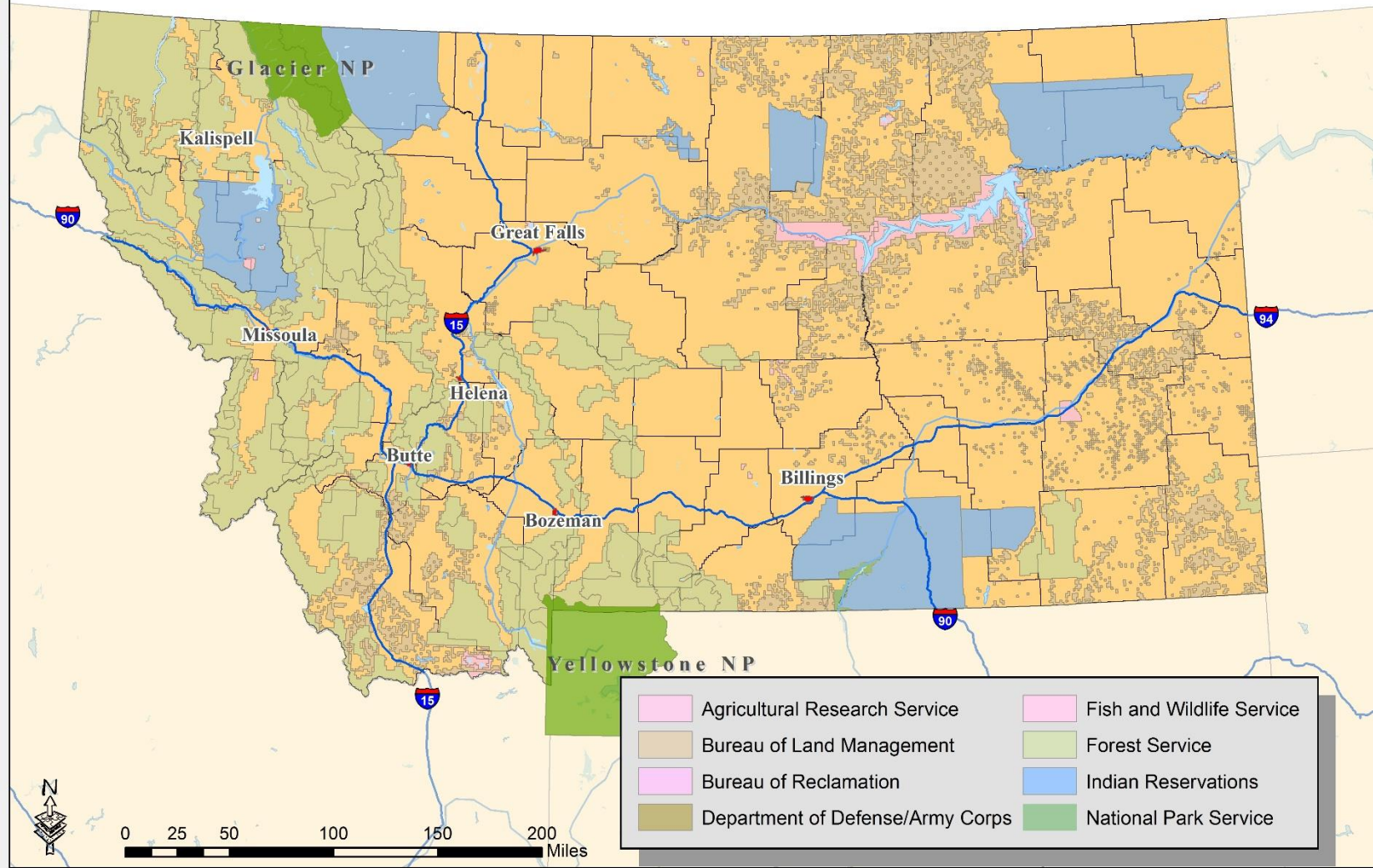
- 76% In Yellowstone Country
- 10% In Glacier Country
- 5% In Southwest Montana
- 6% In Southeast Montana
- 2% In Central Montana
- <1% In Missouri River Country
  
- 36% Hotel
- 20% Private Campground
- 14% Public Lands Campground
- 13% Rented Cabin or Home





Vacation/Recreation with YNP as main attraction also traveled to:

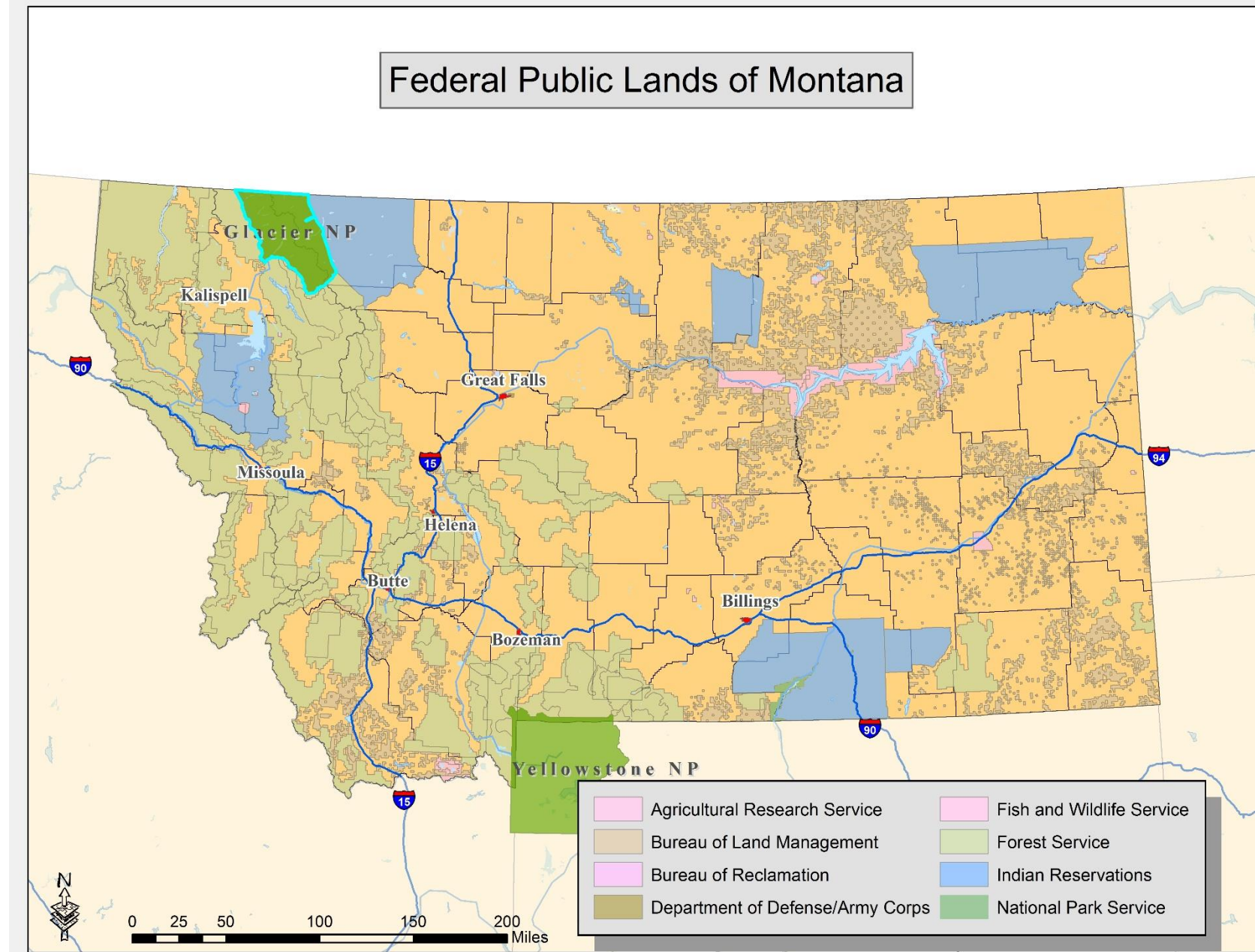
### Federal Public Lands of Montana





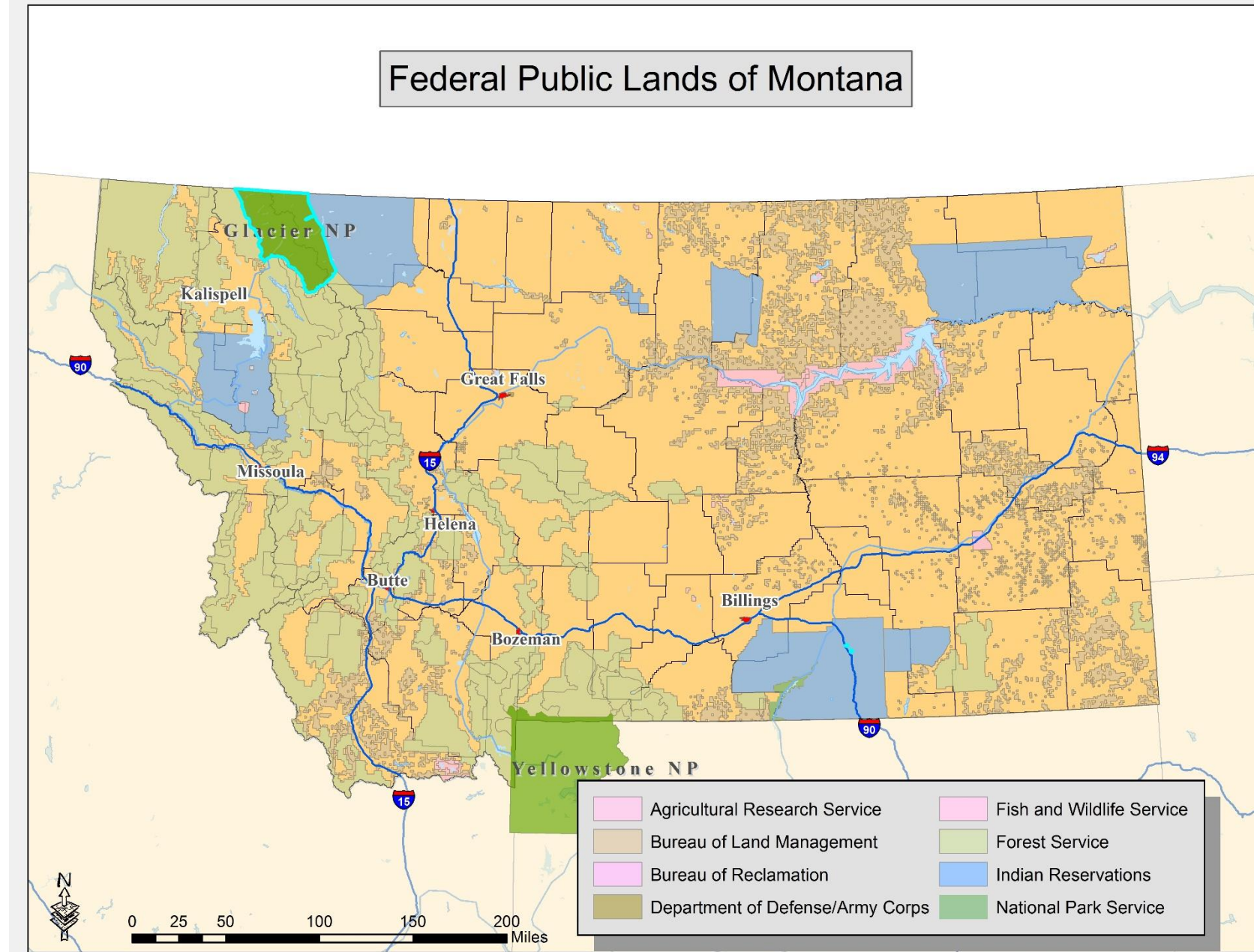
Vacation/Recreation with YNP as main attraction also traveled to:

- Glacier National Park



Vacation/Recreation with YNP as main attraction also traveled to:

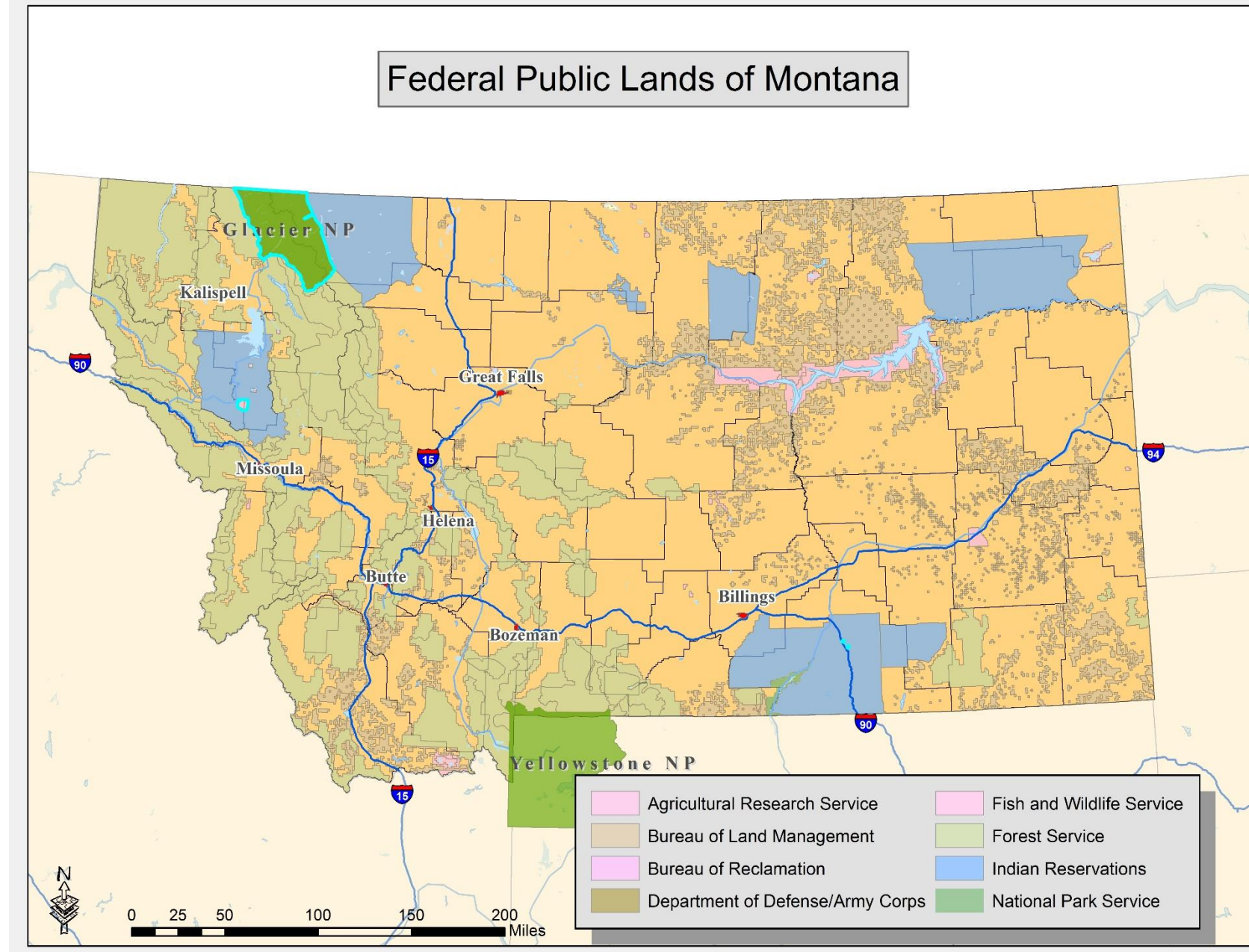
- Glacier National Park
- Little Bighorn Battlefield





Vacation/Recreation with YNP as main attraction also traveled to:

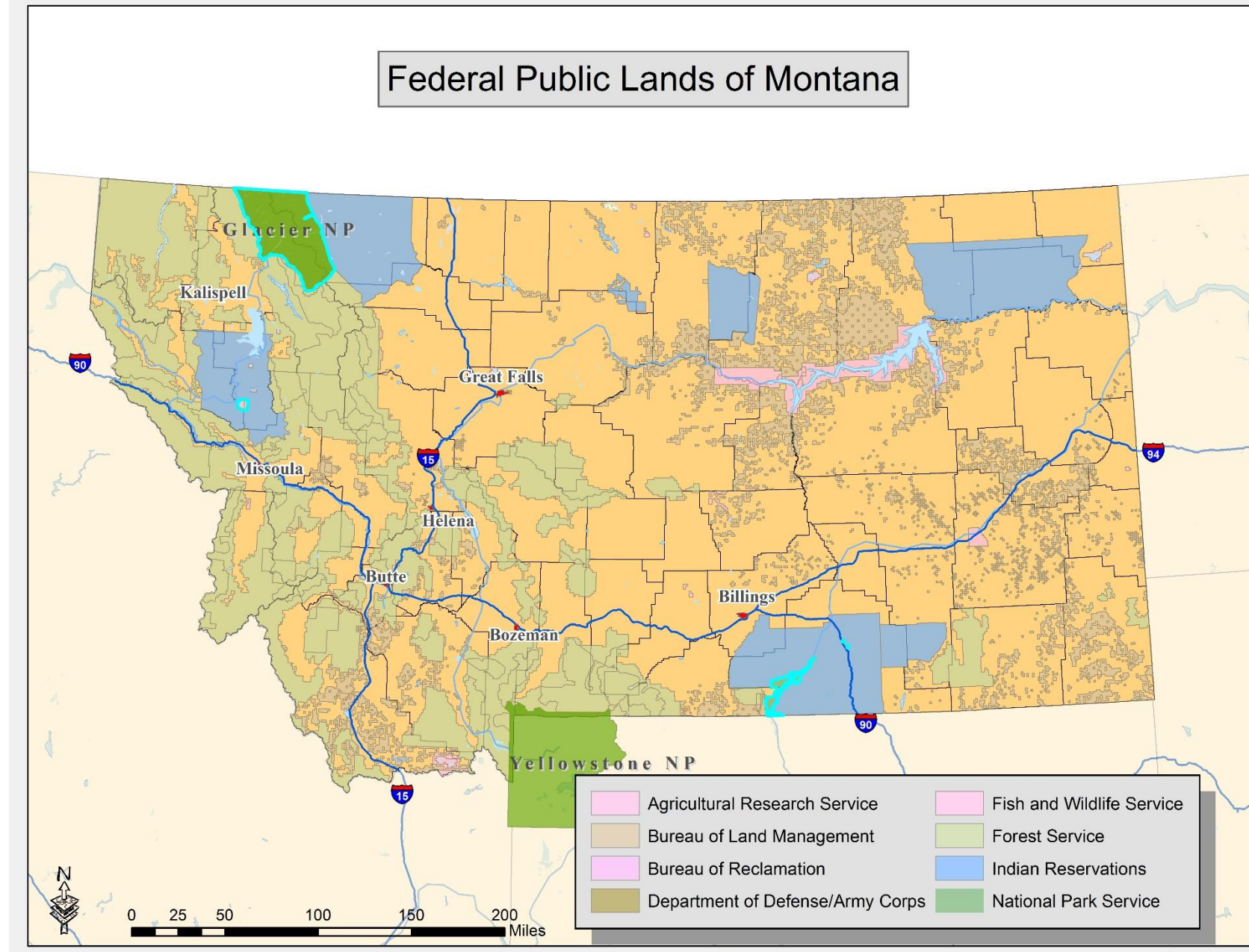
- Glacier National Park
- Little Bighorn Battlefield
- National Bison Range





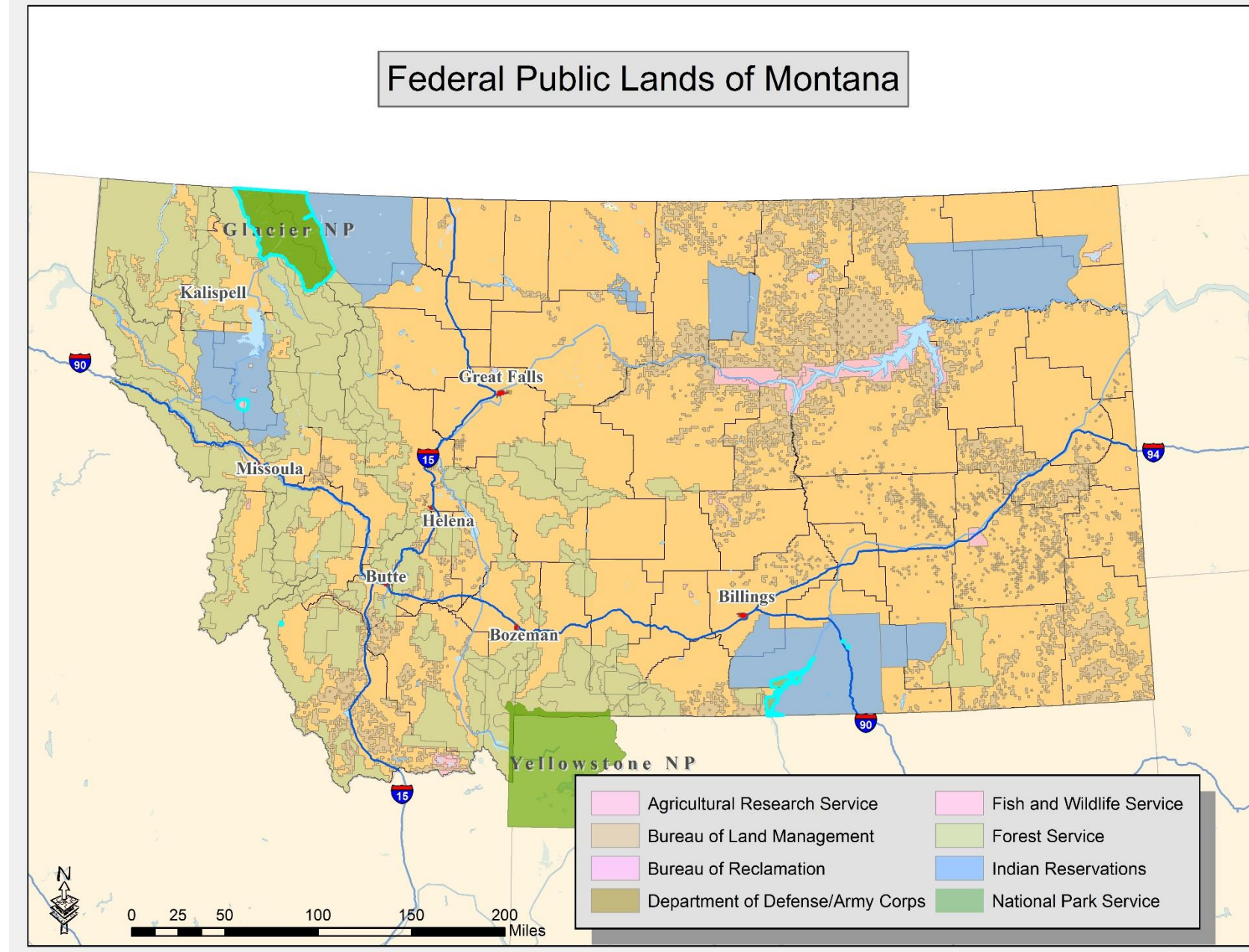
Vacation/Recreation with YNP as main attraction also traveled to:

- Glacier National Park
- Little Bighorn Battlefield
- National Bison Range
- Bighorn Canyon National Recreation Area



Vacation/Recreation with YNP as main attraction also traveled to:

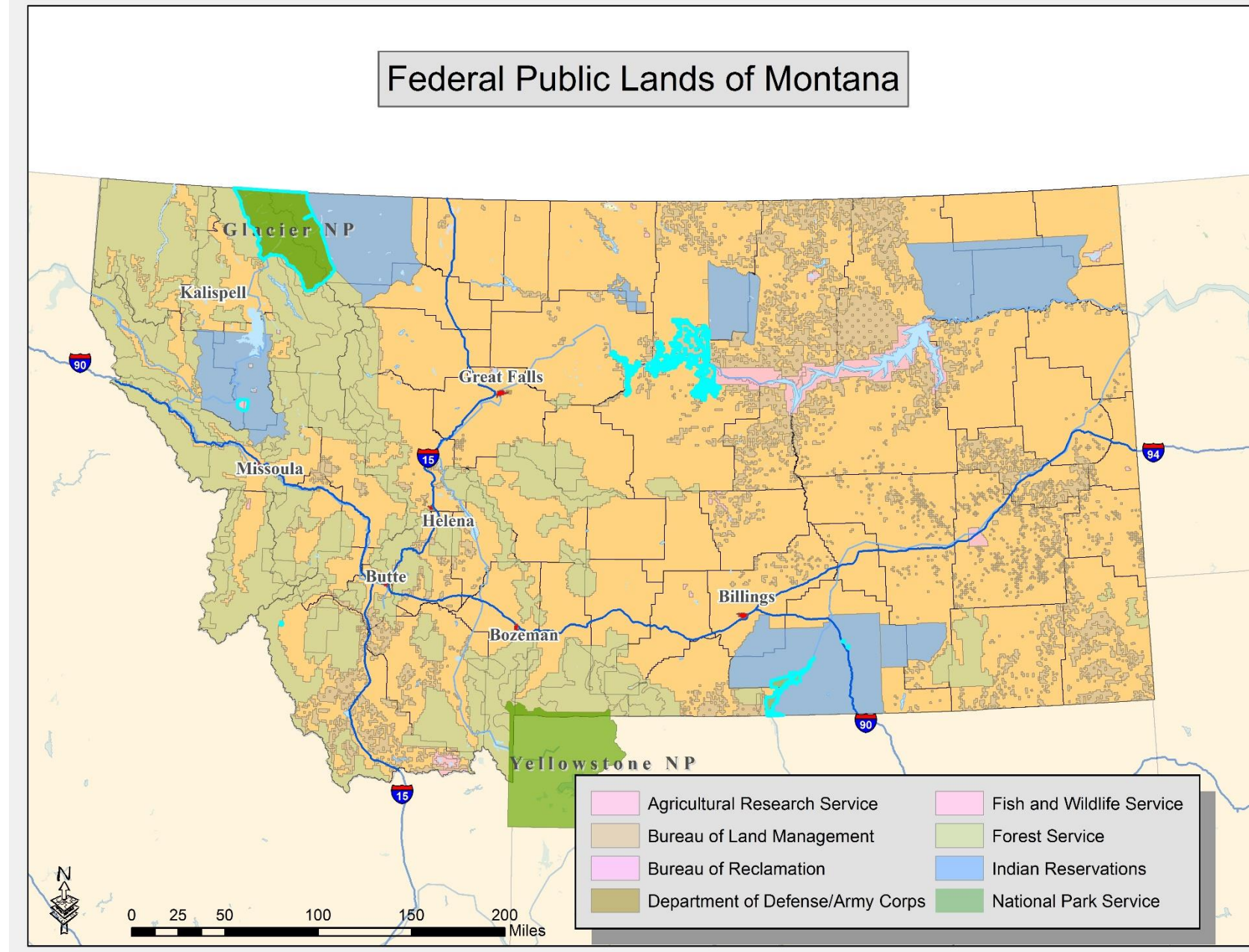
- Glacier National Park
- Little Bighorn Battlefield
- National Bison Range
- Bighorn Canyon National Recreation Area
- Big Hole Battlefield





Vacation/Recreation with YNP as main attraction also traveled to:

- Glacier National Park
- Little Bighorn Battlefield
- National Bison Range
- Bighorn Canyon National Recreation Area
- Big Hole Battlefield
- Missouri River Breaks National Monument





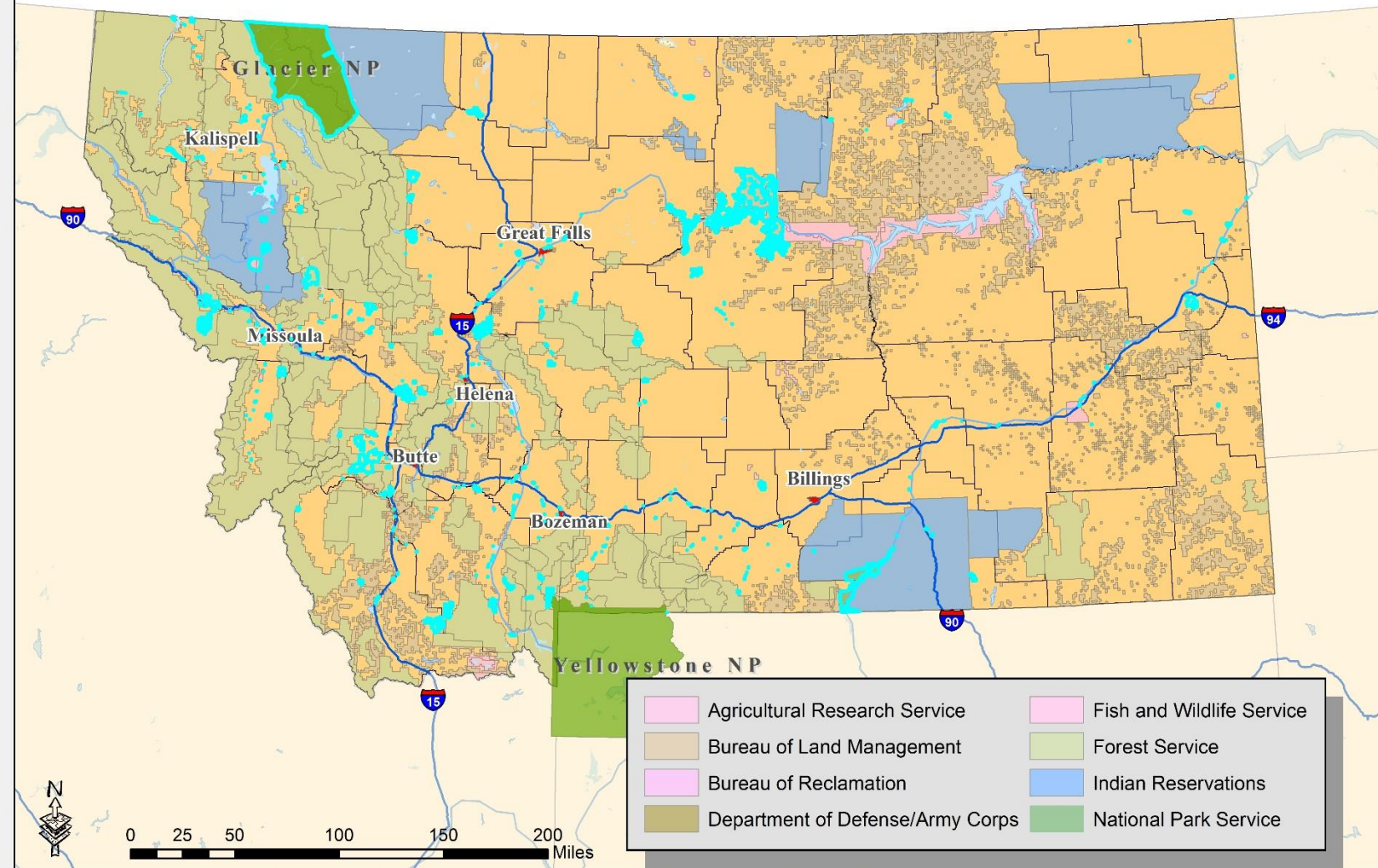
Vacation/Recreation with YNP as main attraction also traveled to:

- Glacier National Park
- Little Bighorn Battlefield
- National Bison Range
- Bighorn Canyon National Recreation Area
- Big Hole Battlefield
- Missouri River Breaks National Monument

As well as:

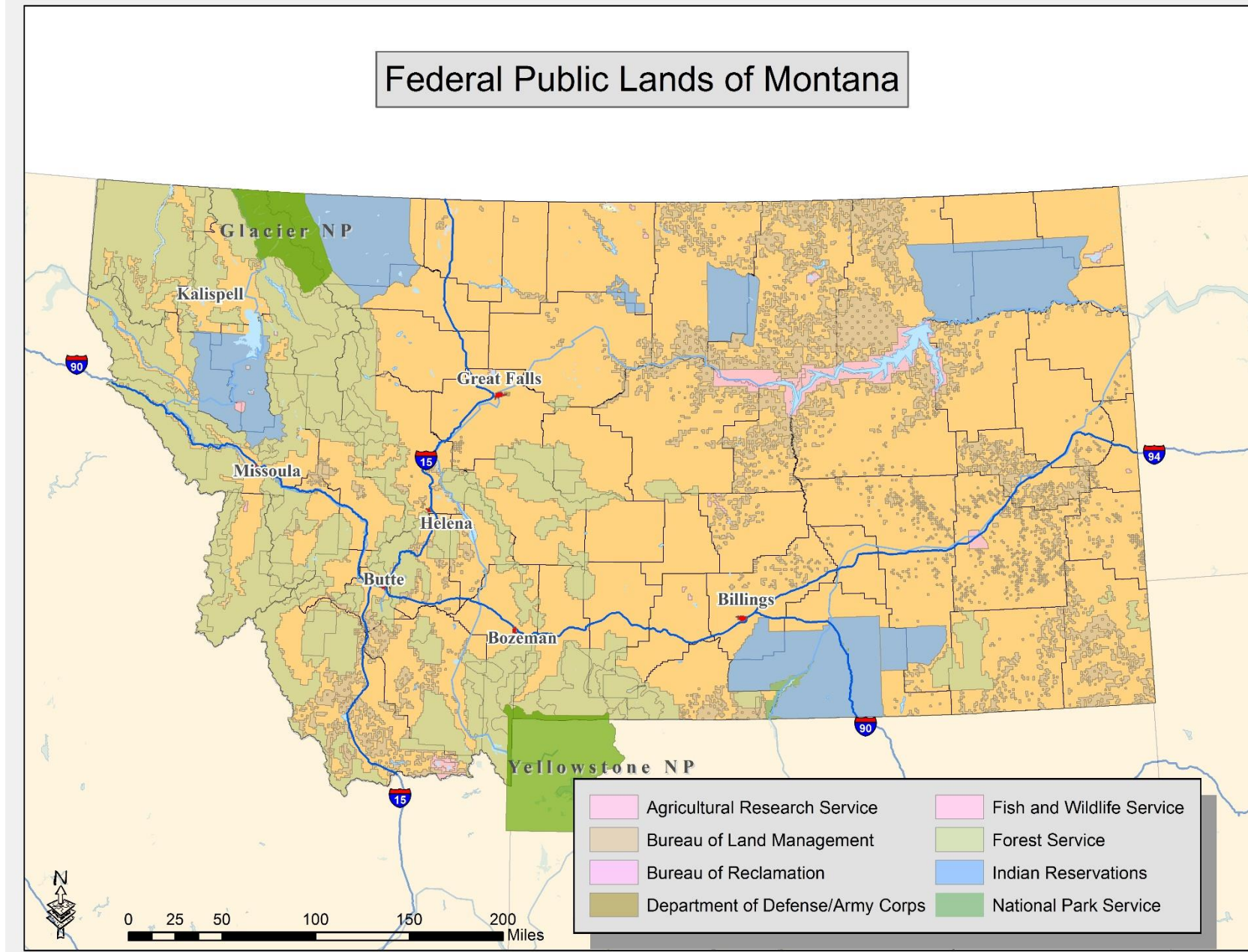
- Montana State Fish Wildlife & Parks
  - State Parks
  - Fishing Access Sites
- Hot Springs

## Federal Public Lands of Montana



## Why Do we care?

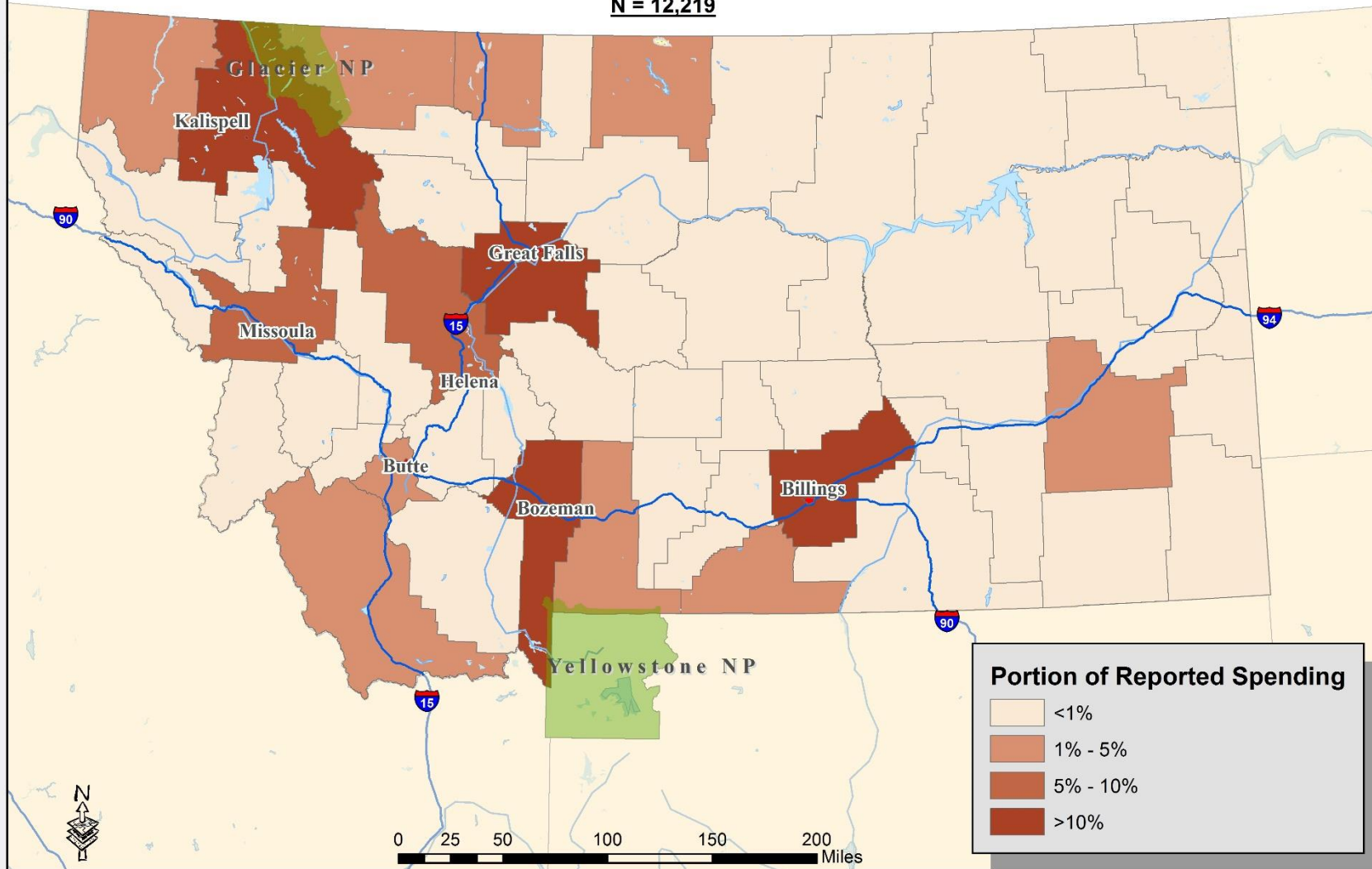
- Yellowstone may be the primary attraction, but visitors do a lot more than just visit the park.
  - Economic contribution likely does not follow a simple circle around the park.
    - Networks
    - Attractions/Centers
- Not only should Park officials be concerned with transportation management within the Park, but local and state managers must be concerned with the transportation management that is largely influenced by visitors:
  - In gateway communities
  - Between major attractions





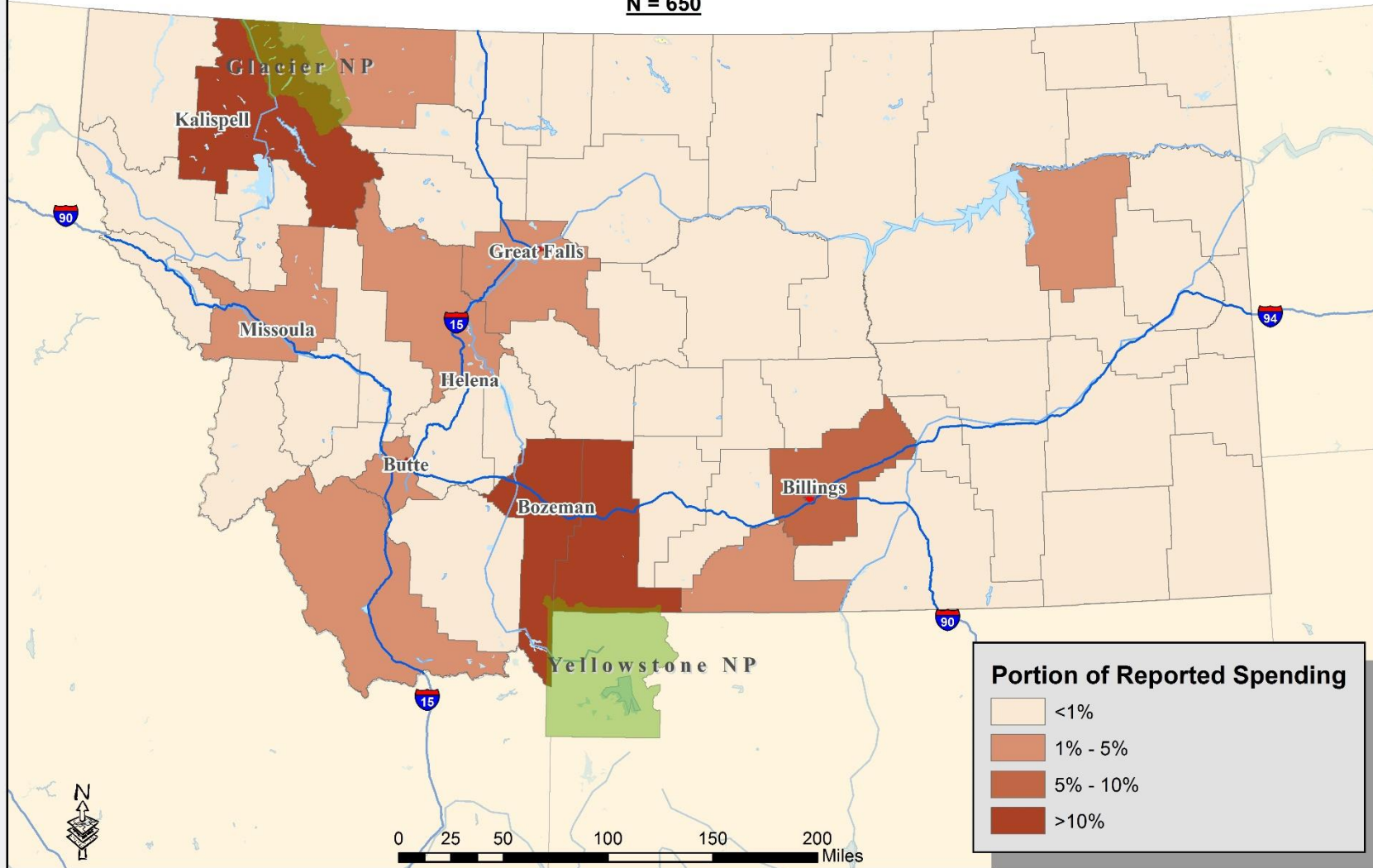
# Montana Visitor Spending by County All Respondents - 2015

N = 12,219



# Yellowstone National Park Visitor Spending by County All Respondents - 2015

**N = 650**



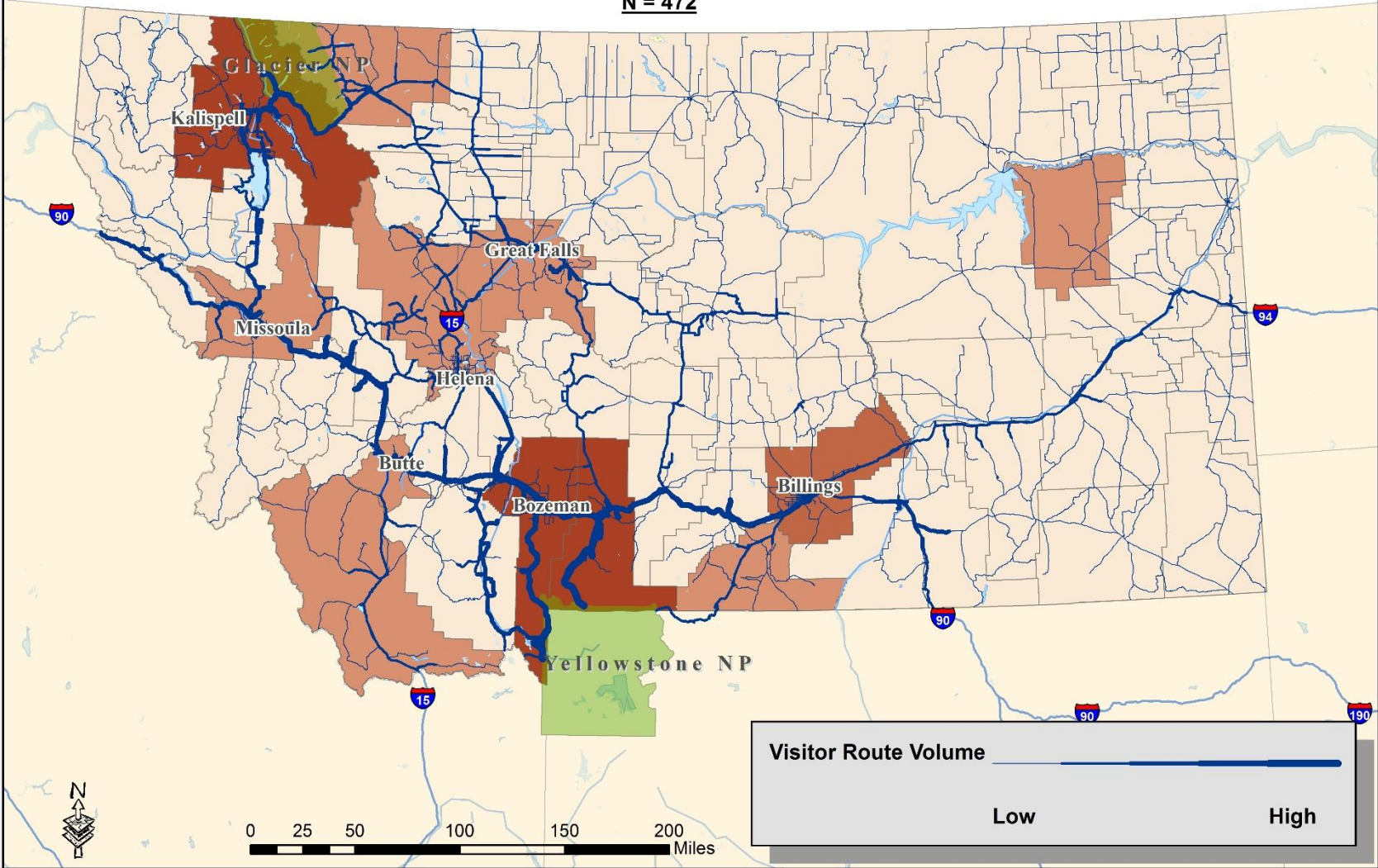
**Portion of Reported Spending**

- <1%
- 1% - 5%
- 5% - 10%
- >10%



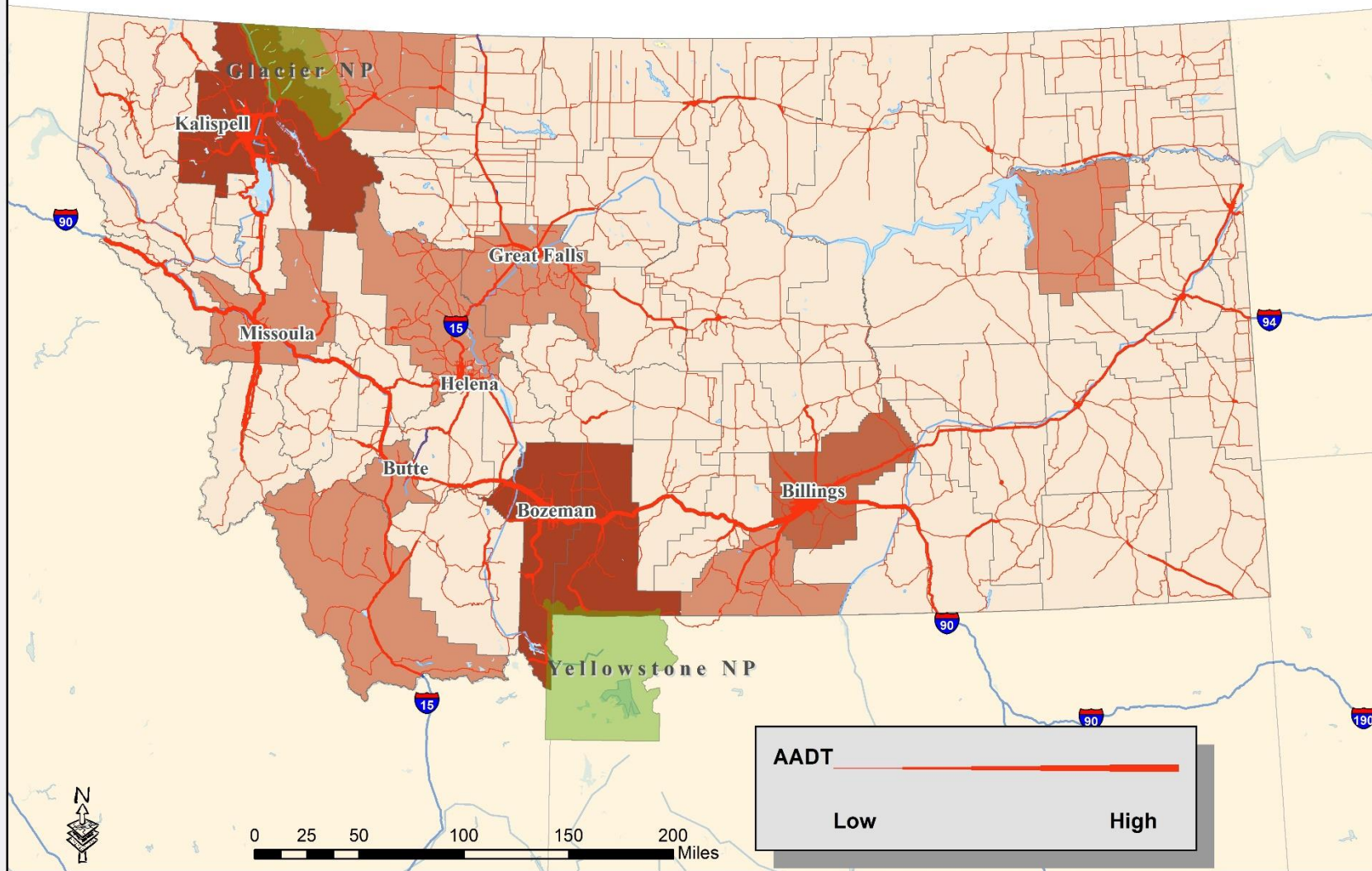
# Yellowstone National Park Visitor Routing All Respondents - 2015

N = 472



# Montana AADT 2015

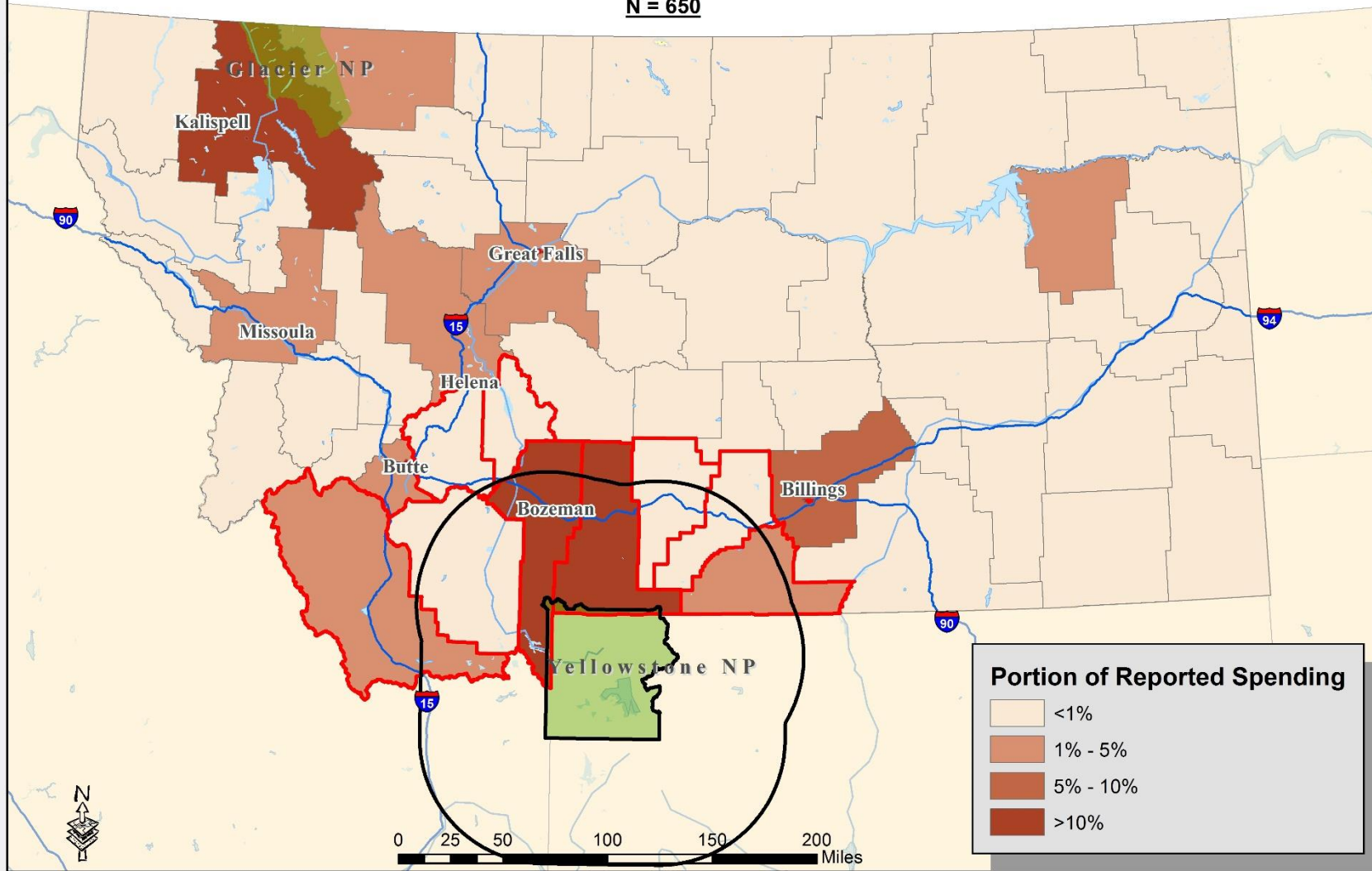
Montana Department of Transportation



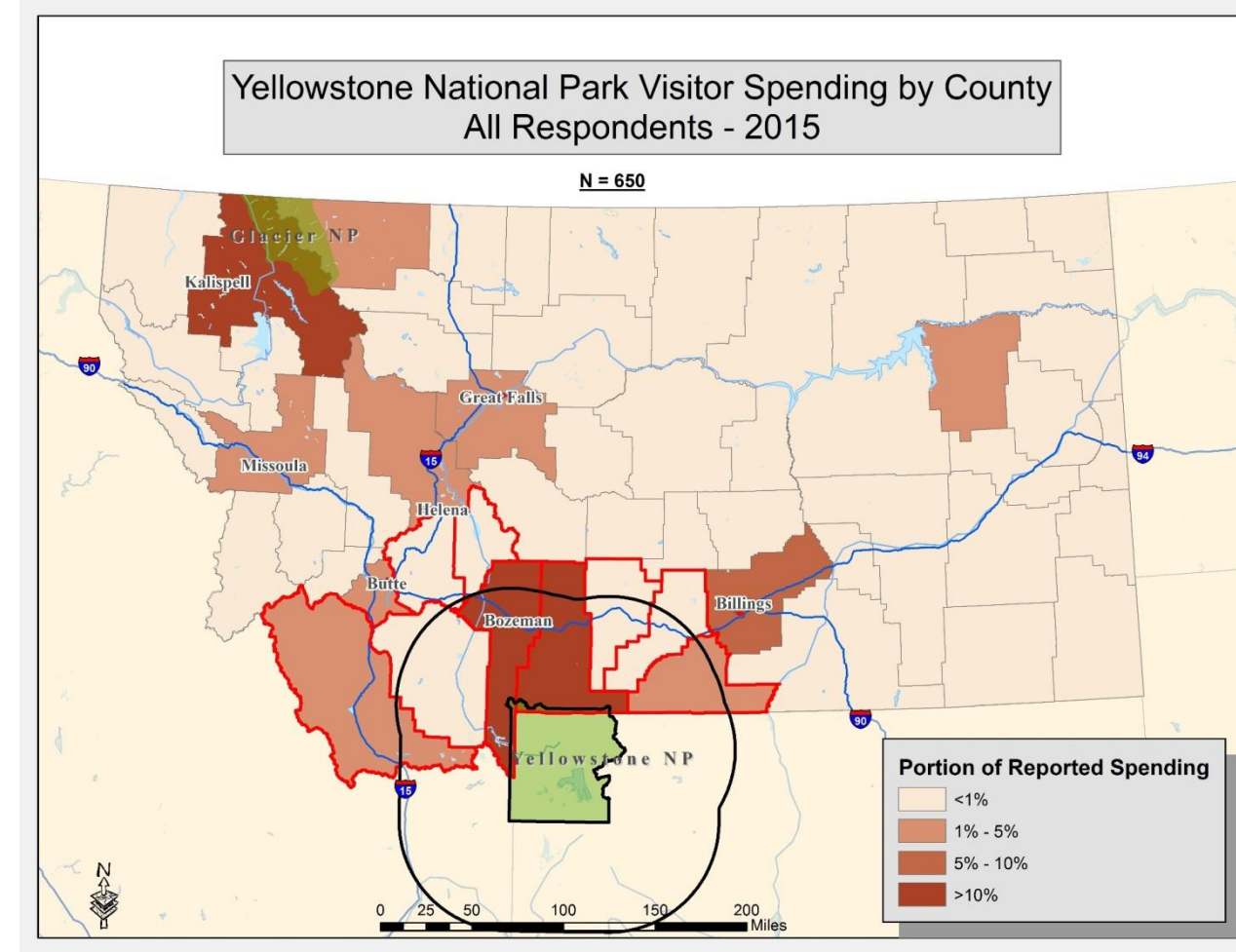


# Yellowstone National Park Visitor Spending by County All Respondents - 2015

N = 650



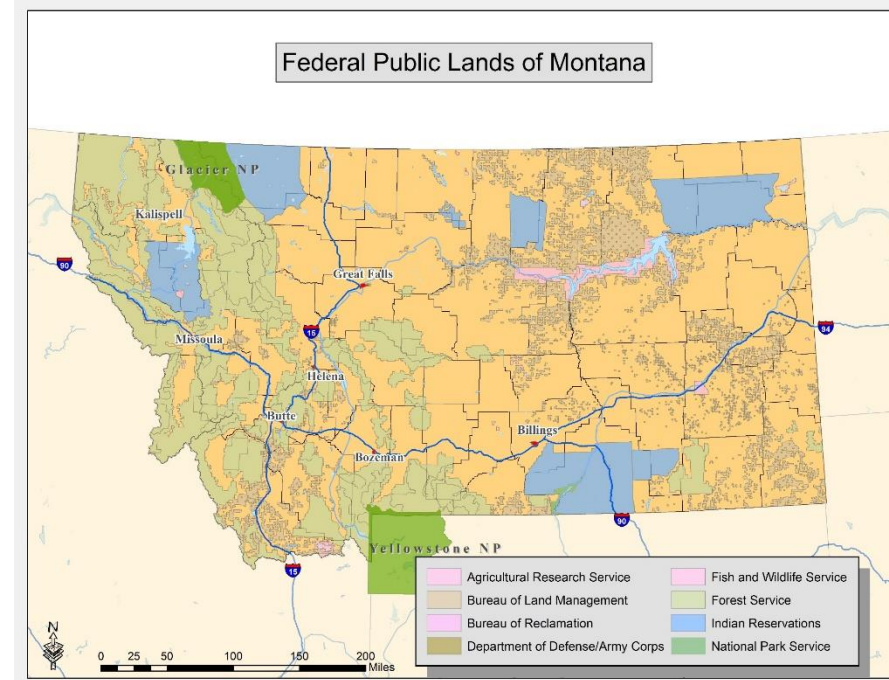
- Impact on local economies
- Impact on local public lands and other natural amenities
- Impact on Roadways
  - Congestion
  - Collisions/Incidents





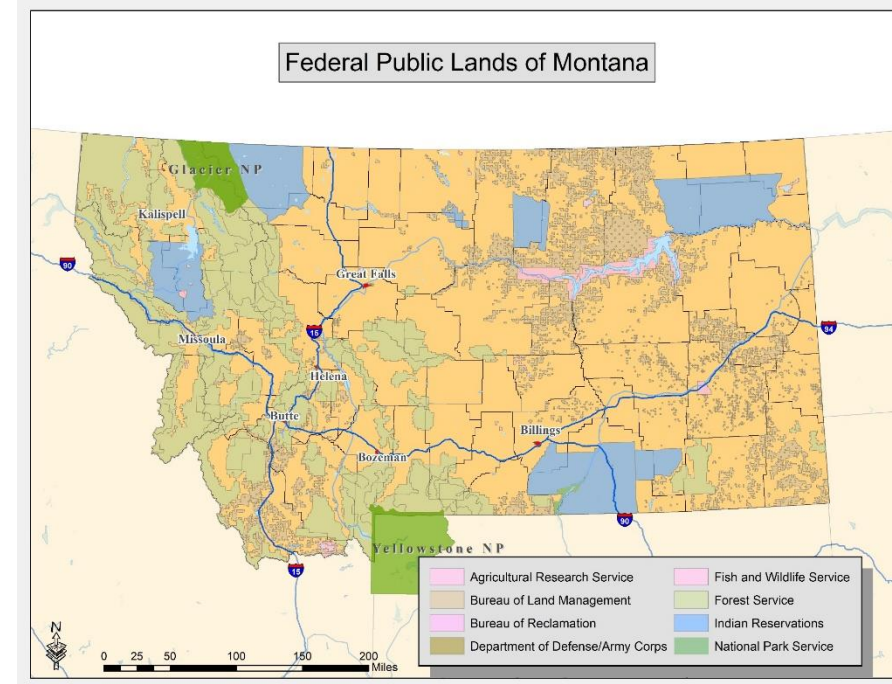
# Safety on Montana's Roadways

Fatality Crash Information Montana Highway Patrol	2015		2016		2017	
	Crashes	Deaths	Crashes	Deaths	Crashes	Deaths
<b>Total (1/1-8/28)</b>	<b>135</b>	<b>146</b>	<b>120</b>	<b>131</b>	<b>114</b>	<b>127</b>
Out of State Vehicle Involved	23 17%	29 20%	14 12%	17 13%	28 25%	33 26%
Alcohol Suspected	61 45%	66 45%	58 48%	66 50%	38 33%	42 33%



## Next Steps

- Expansion of routing from respondents to visitor population
- Expand to all visitors in Montana
- Overlay of incident locations and visitor routing



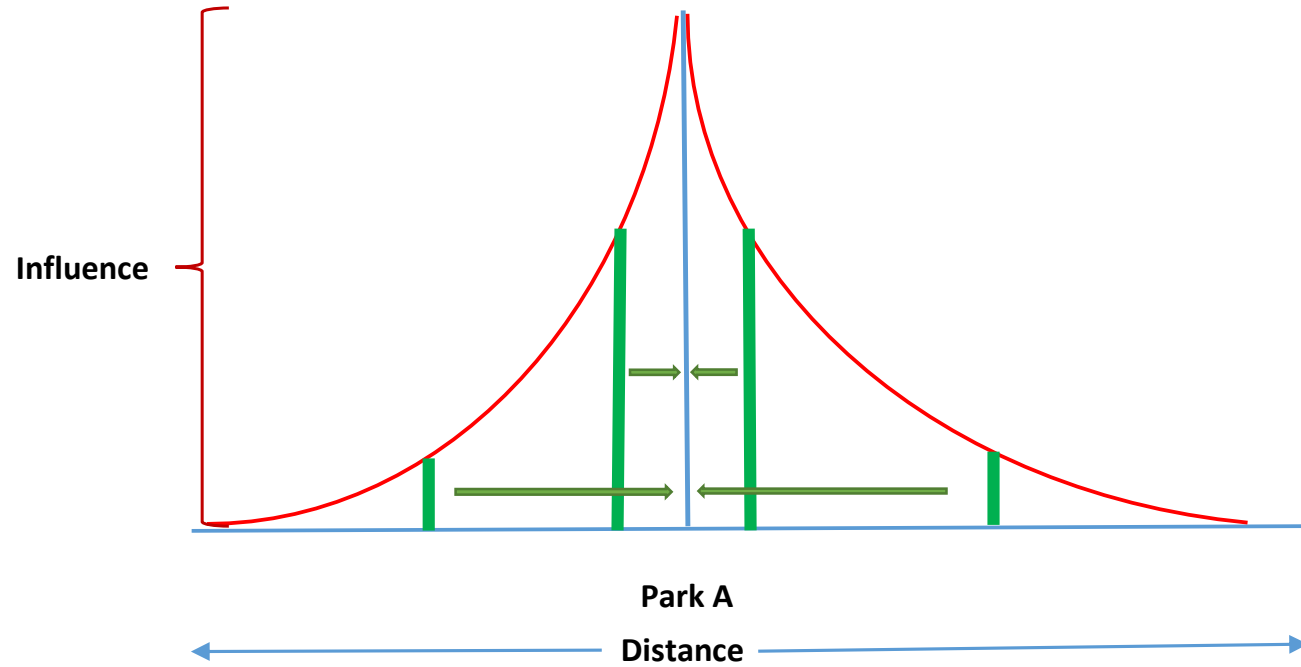




Thank you!

[www.itrr.umt.edu](http://www.itrr.umt.edu)

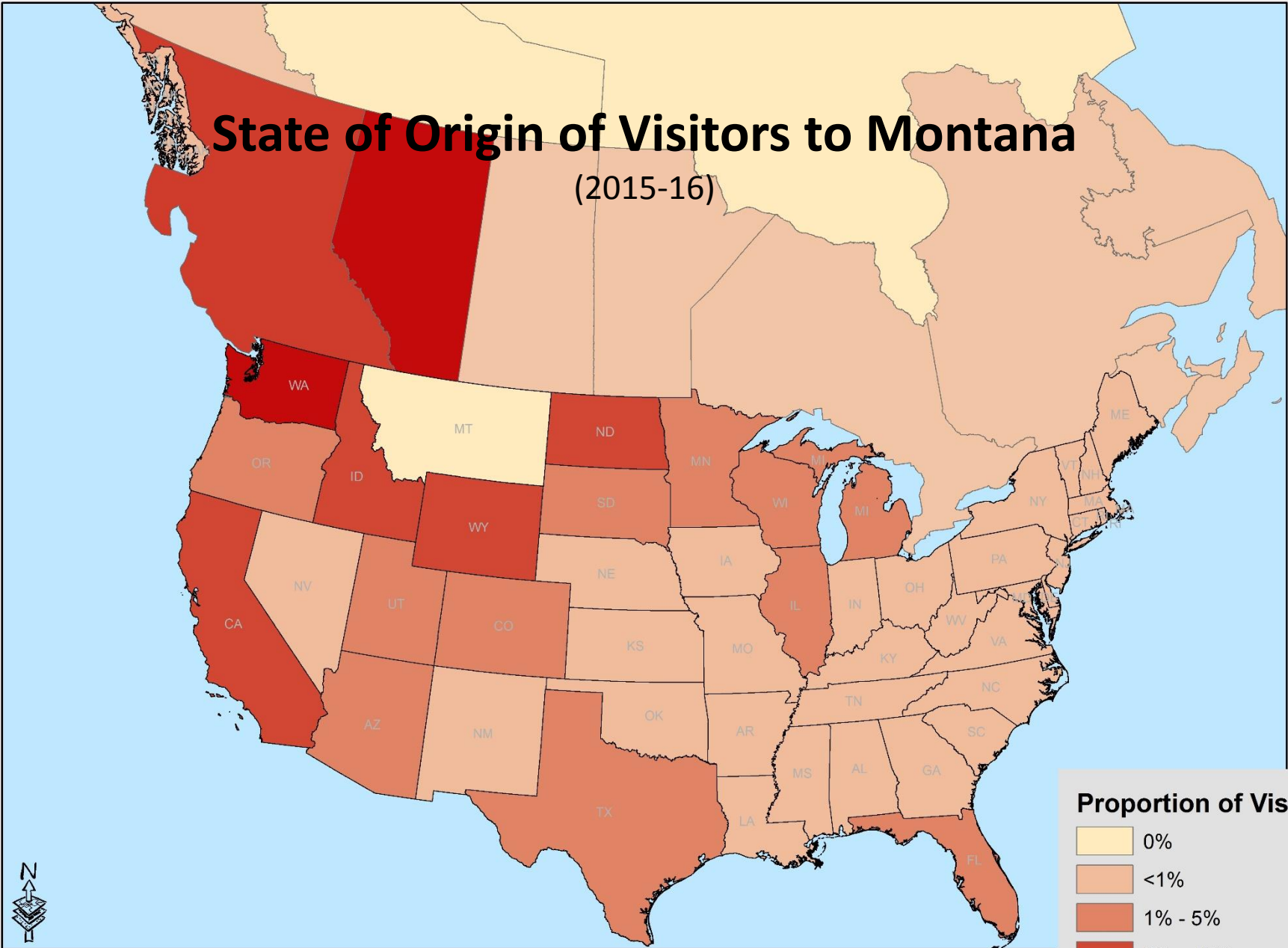
# Field of Influence





# State of Origin of Visitors to Montana

(2015-16)

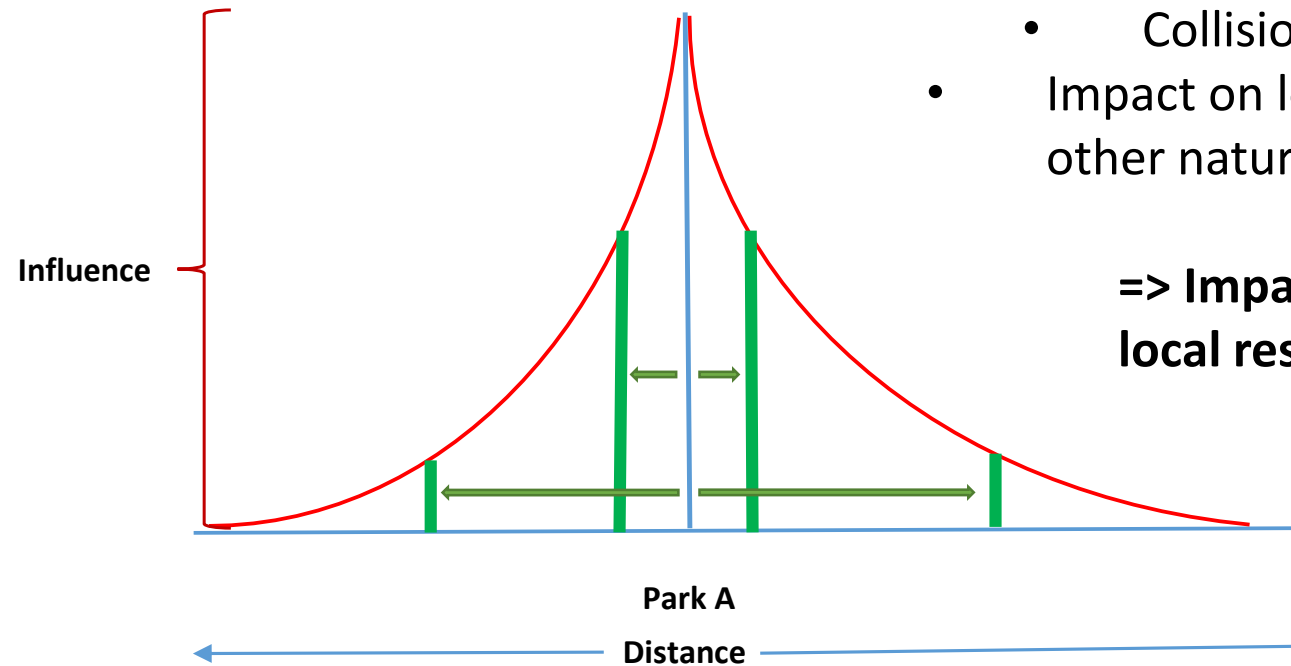


### Proportion of Visitors

- 0%
- <1%
- 1% - 5%
- 5% - 10%
- >10%

# ~~Field of Influence~~ Influence Zone

- Impact on local economies
- Impact on Roadways
  - Congestion
  - Collisions/Incidents
- Impact on local public lands and other natural amenities



**=> Impact on the management of local resources.**