

Analyzing the Recreation Driven Economic and Social Opportunities and Challenges Related to Bison Conservation in Northeast Montana



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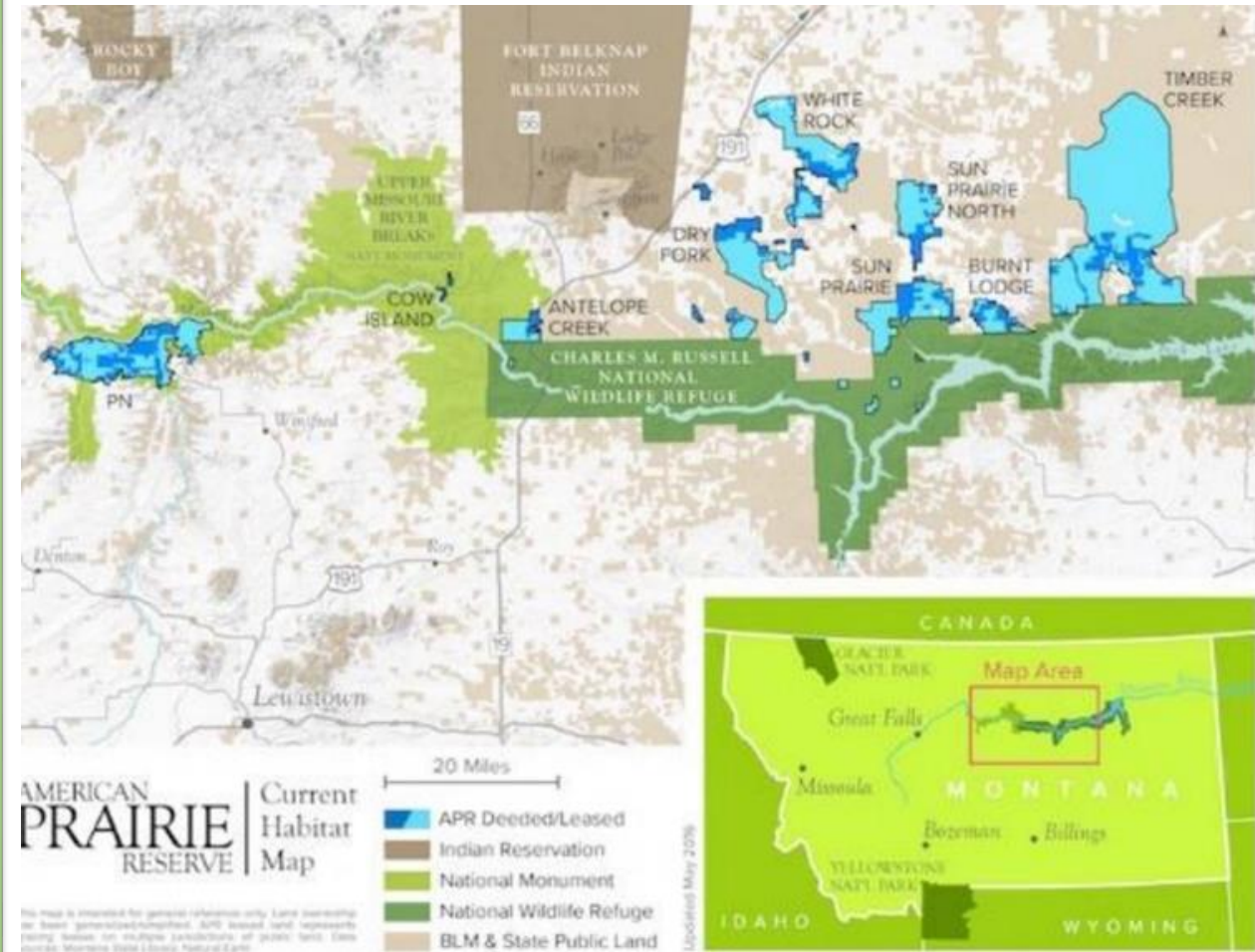
Study Overview

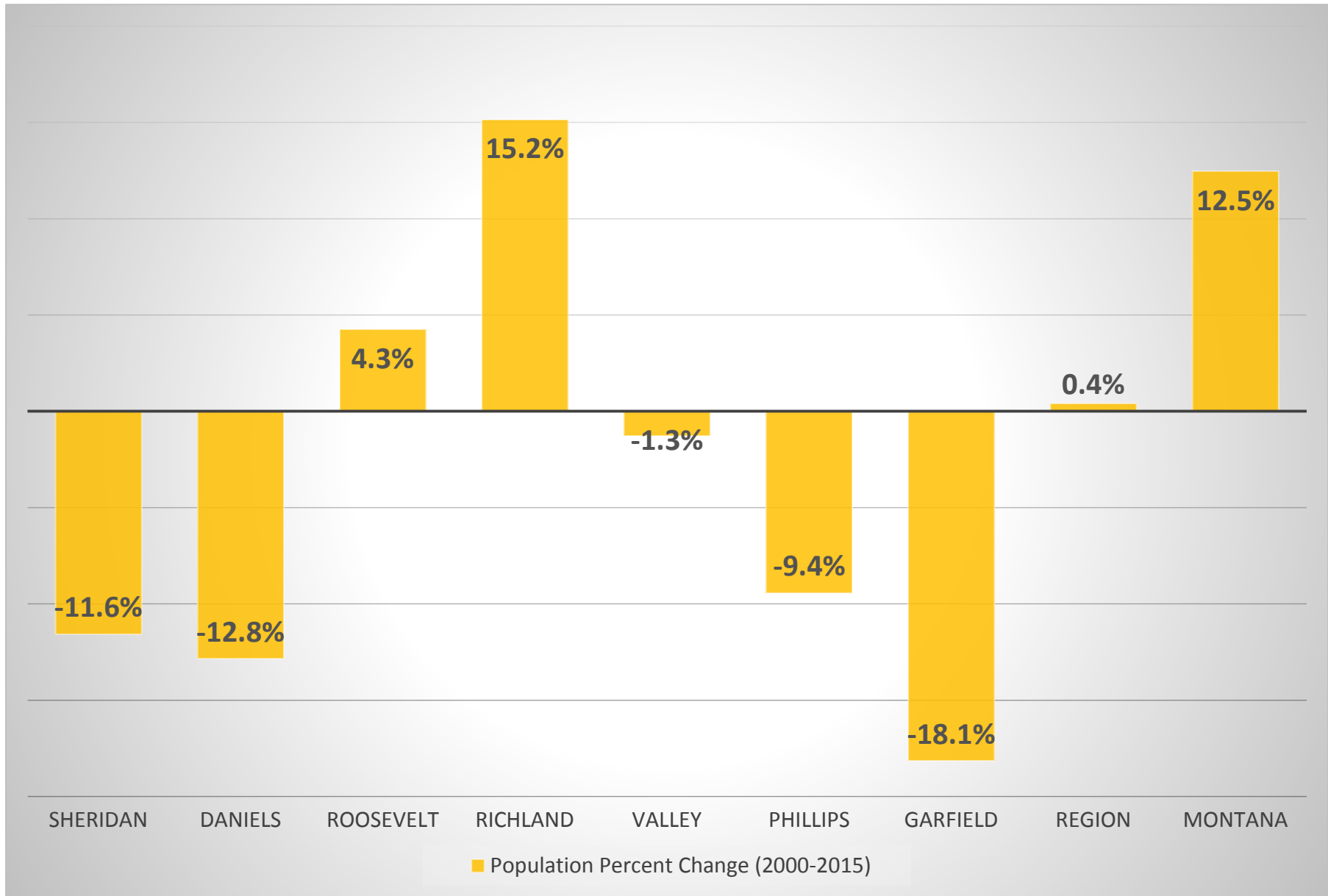
• Background

- Development of the American Prairie Reserve.
- National Wildlife Federation interest in the social and economic opportunities.

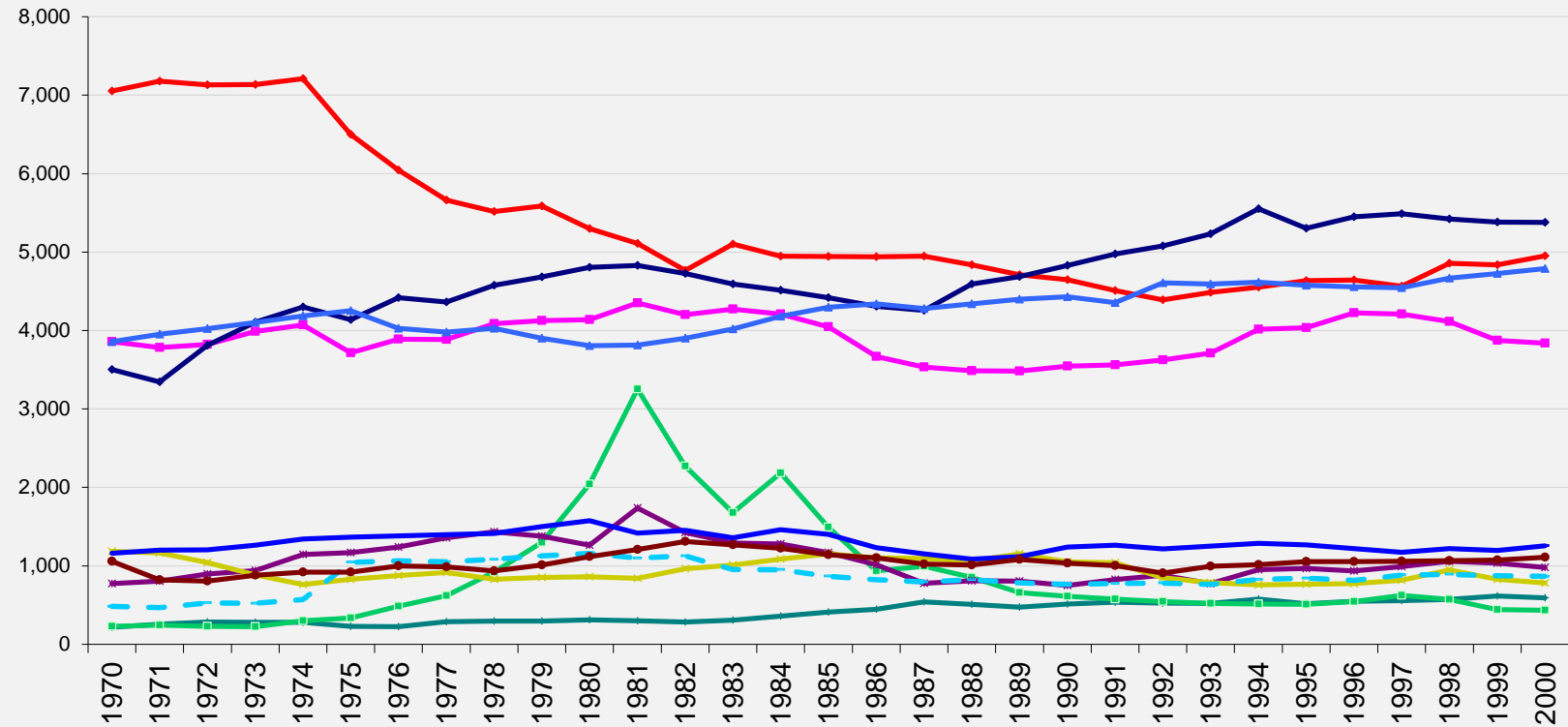
• Approach

- Panel Survey via Qualtrics
- Montana Residents:
318 responses (35%)
- Nonresidents:
623 responses (26%)
- Base Data from Nonresident travel surveys.

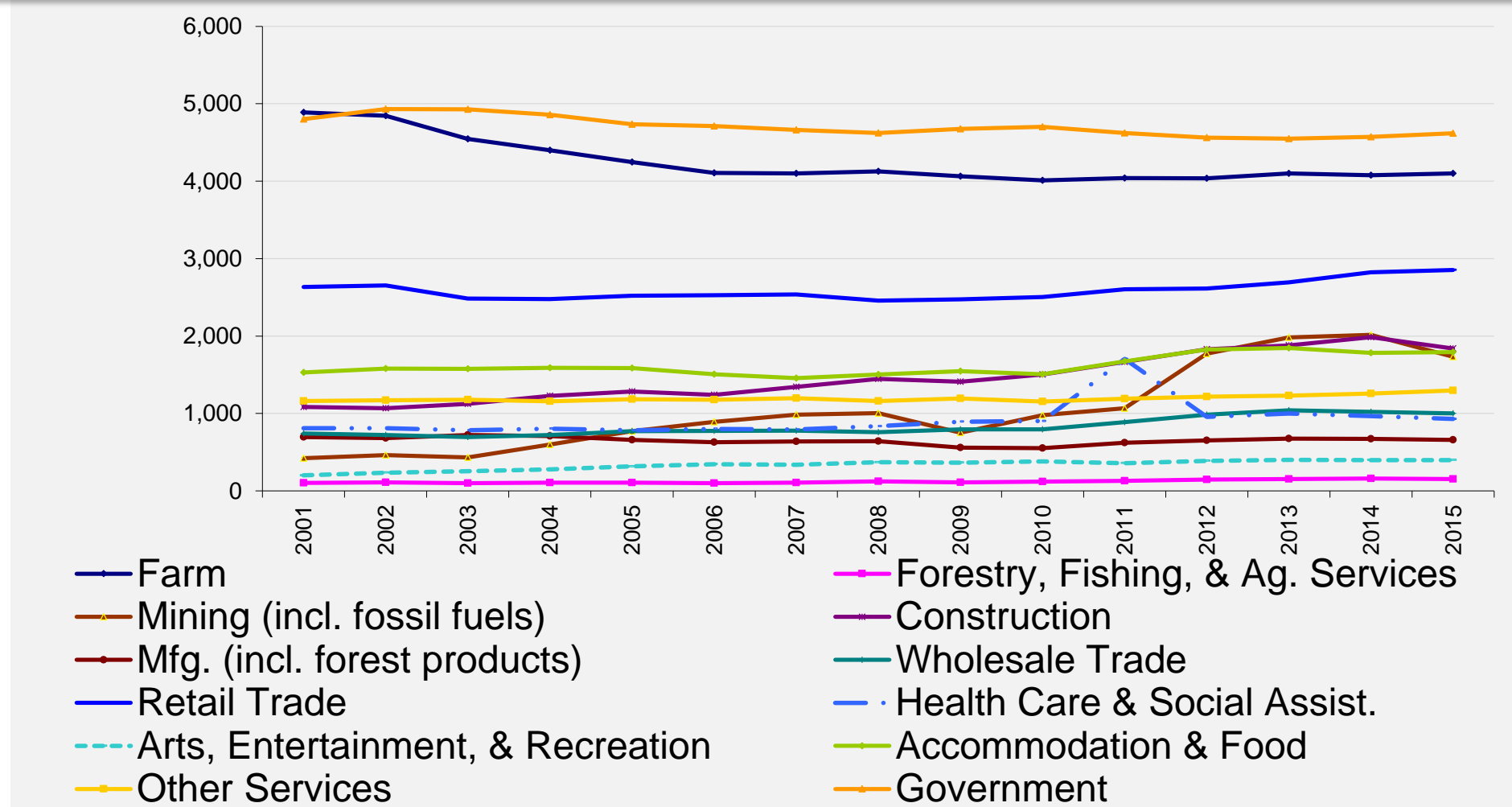




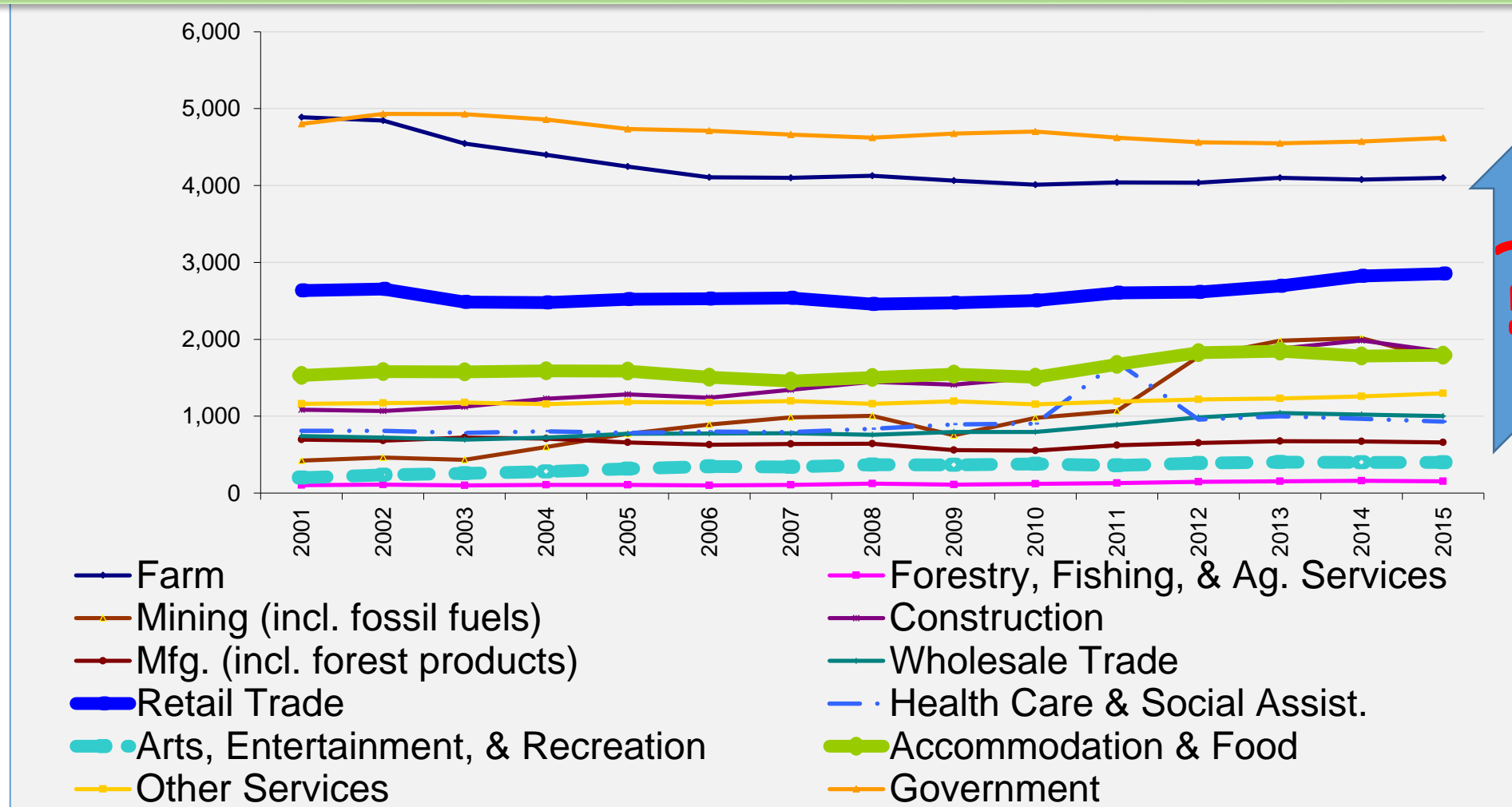
Employment by Industry (1970-2000)



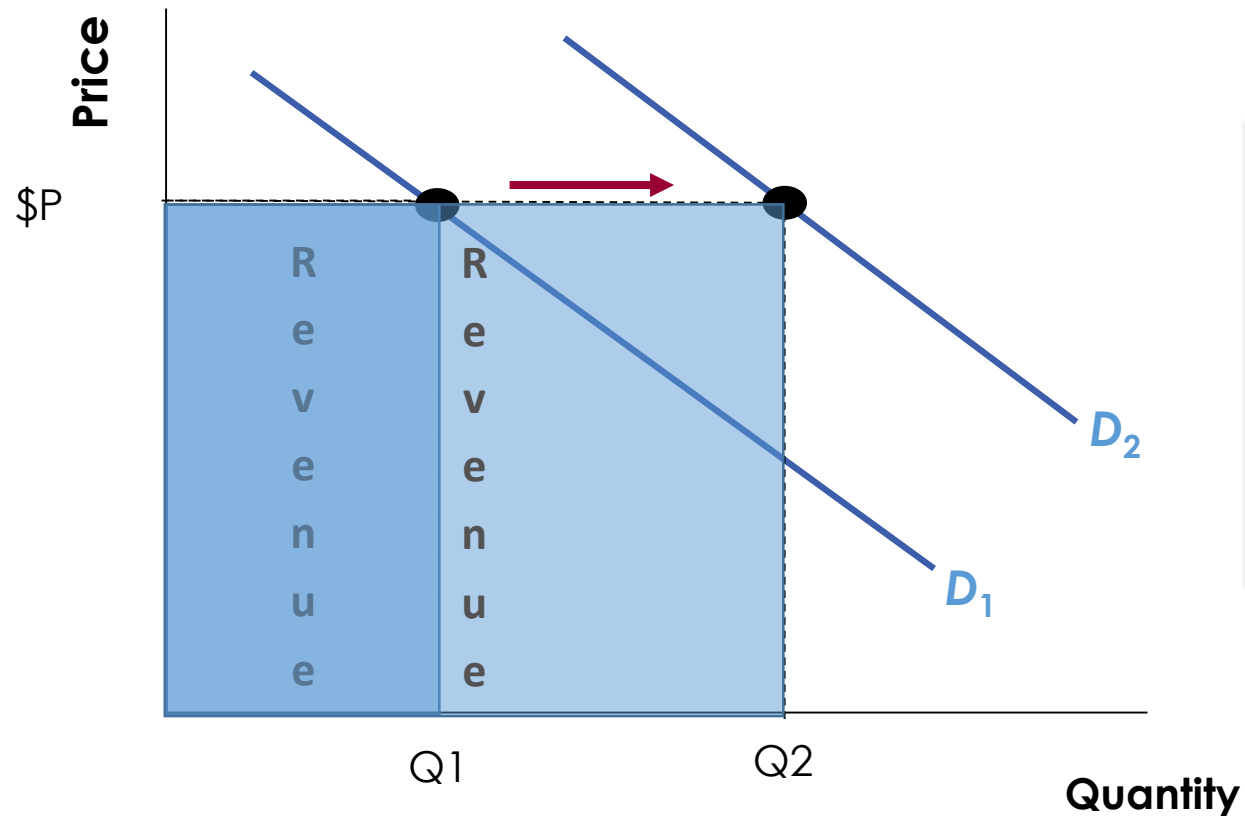
Employment by Industry (2001-2015)



Employment by Industry (2001-2015)



Shifting the Demand Curve Rightward

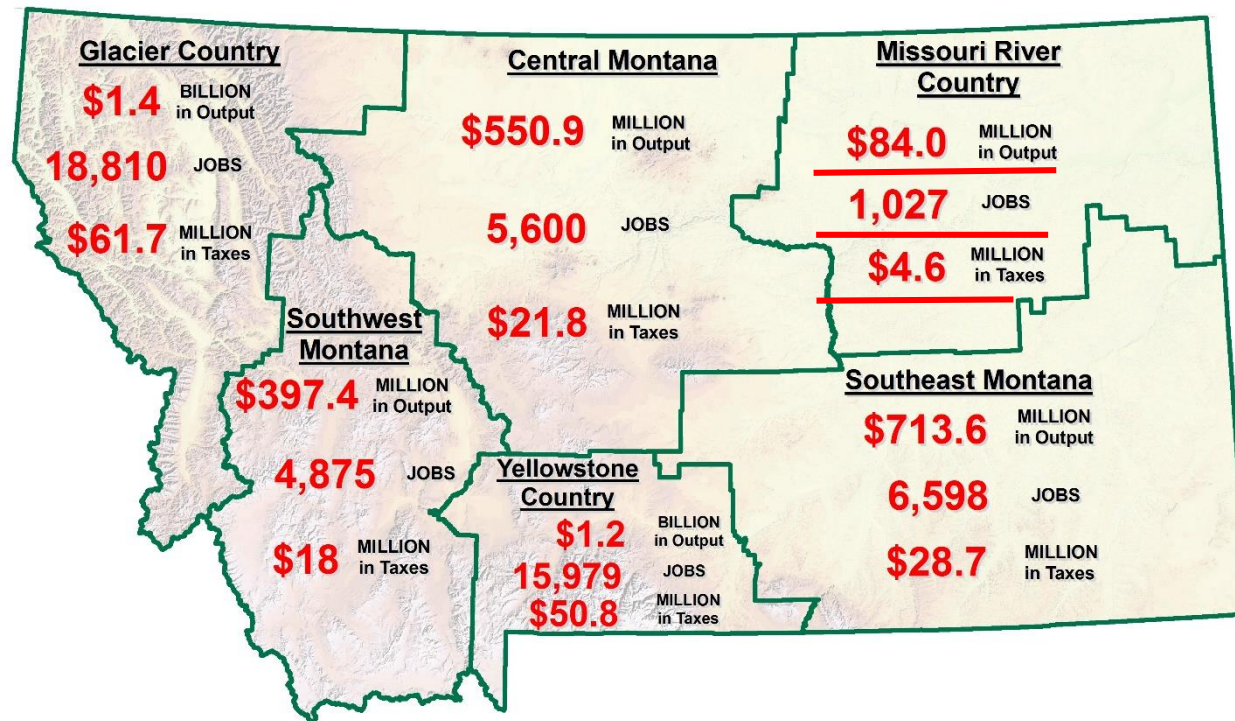


- Attractions
- Perceptions
- Amenity Quality

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

Top 10 Sites Visited

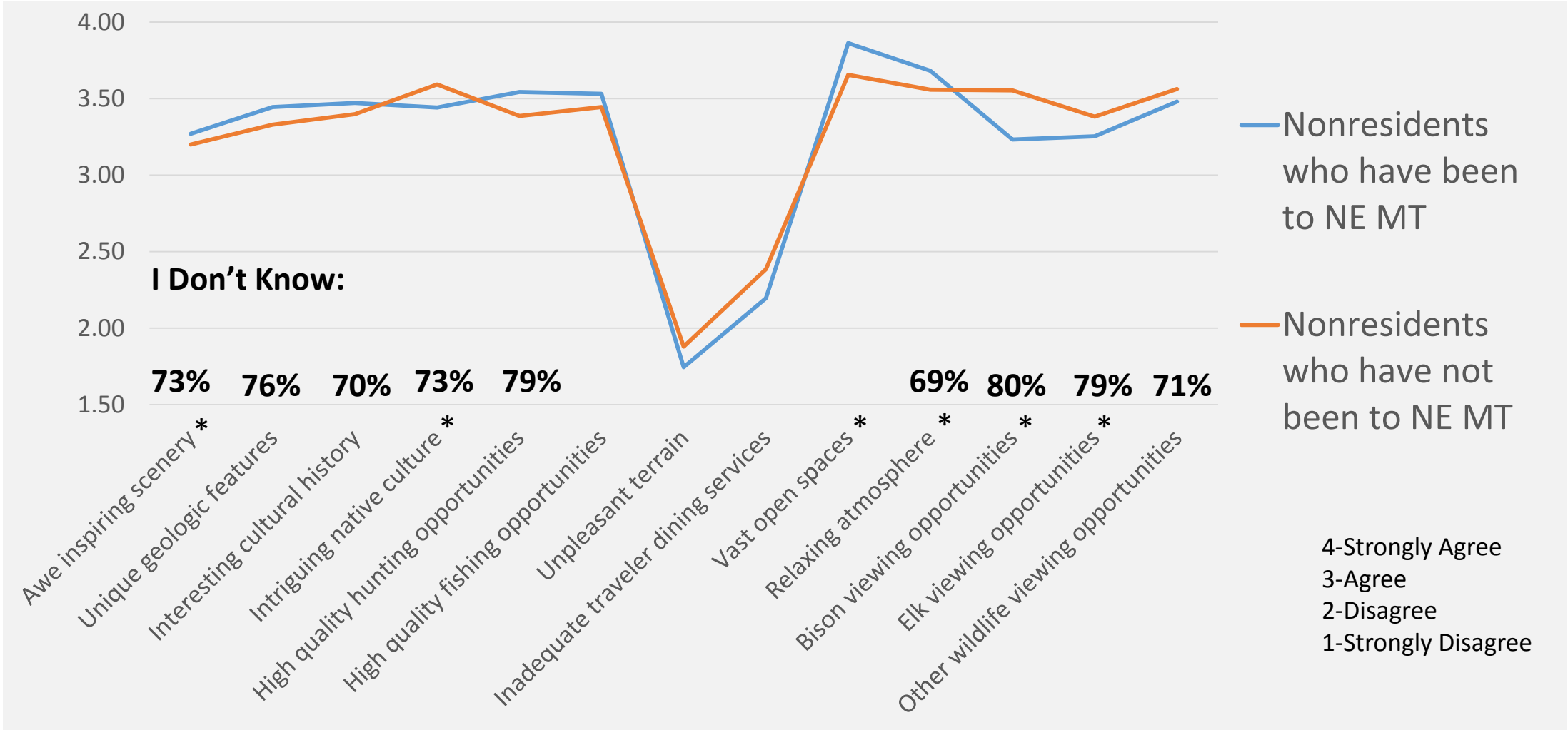
Glacier National Park	63%
Fort Peck Lake	29%
Yellowstone	27%
Fort Peck Interpretive Center	15%
Other Montana State Parks	14%
C.M. Russell National Wildlife Refuge	11%
Little Bighorn Battlefield	10%
Flathead Lake State Parks	9%
Pompey's Pillar	7%
Virginia/Nevada City	3%

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

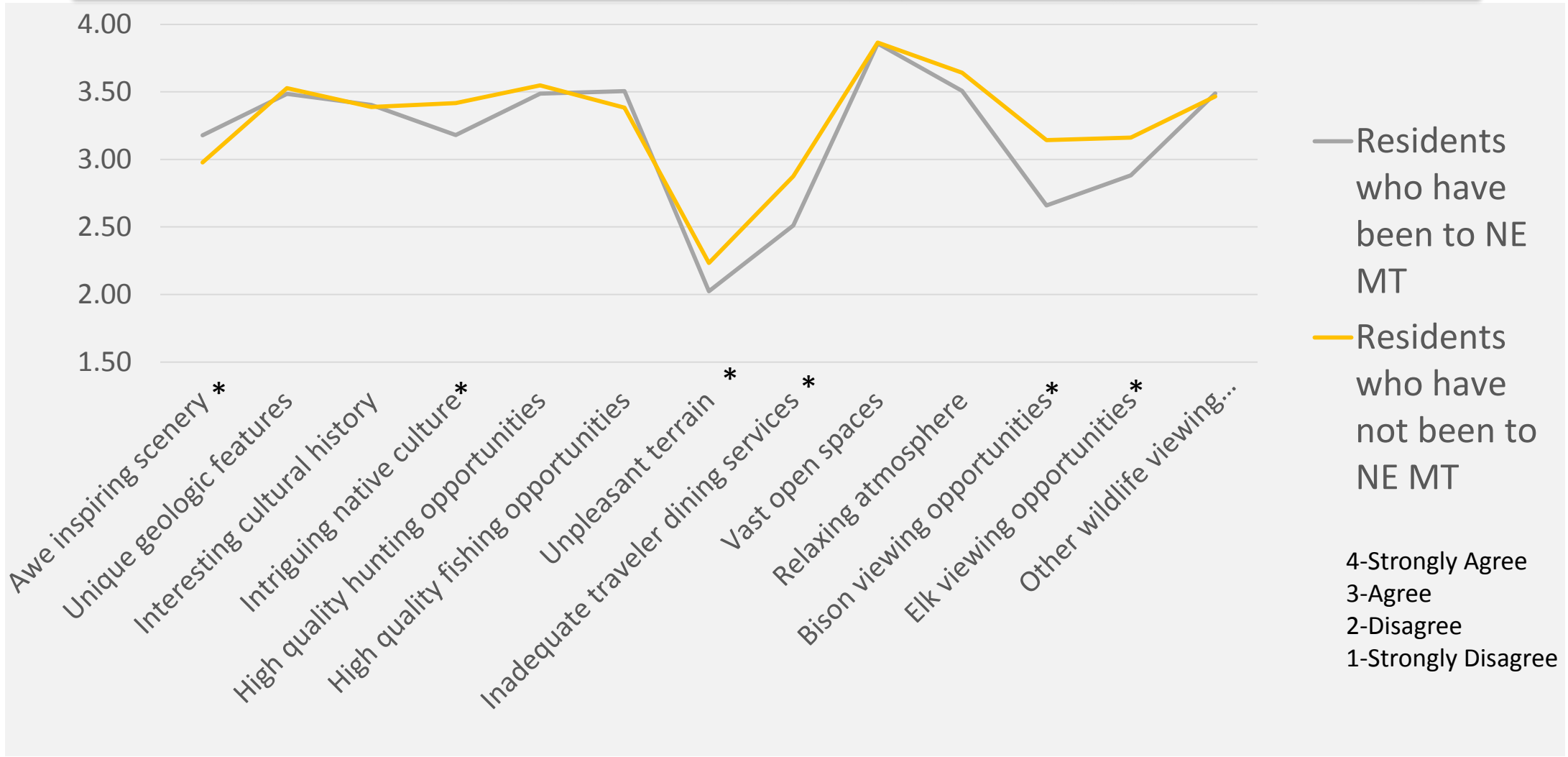
Perceptions of Northeast Montana



* Indicates Difference is significant at P<.05

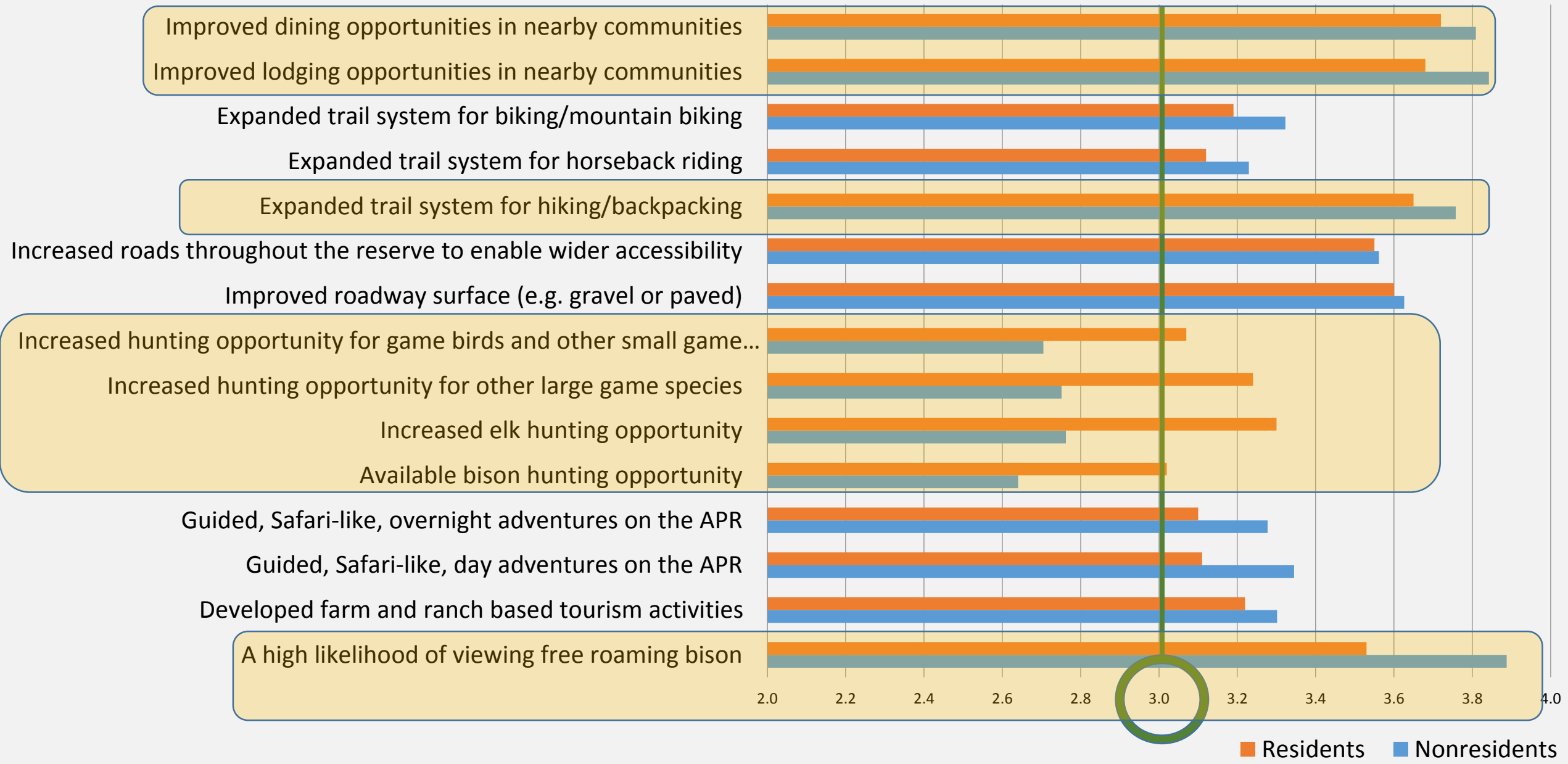
Northeast Montana has...

Perceptions of Northeast Montana



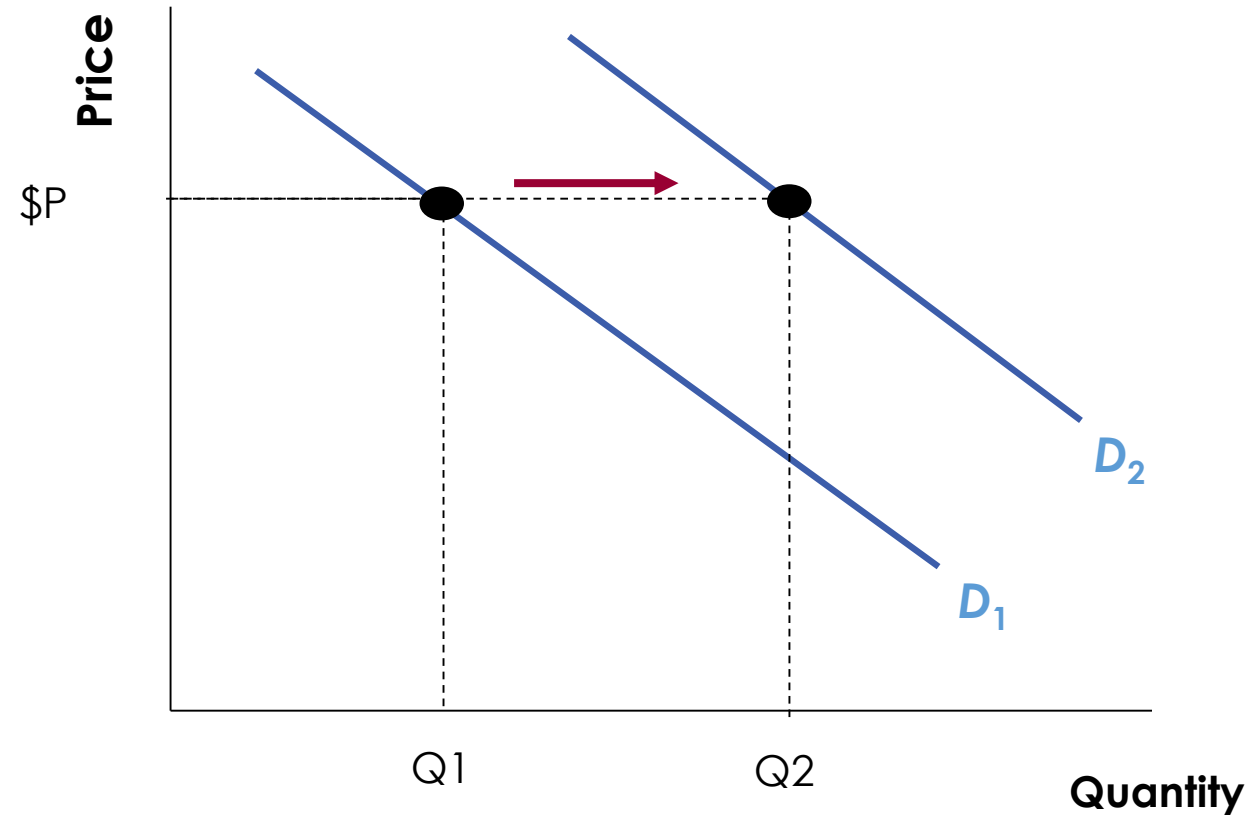
* Indicates Difference is significant at P<.05

Northeast Montana has...



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

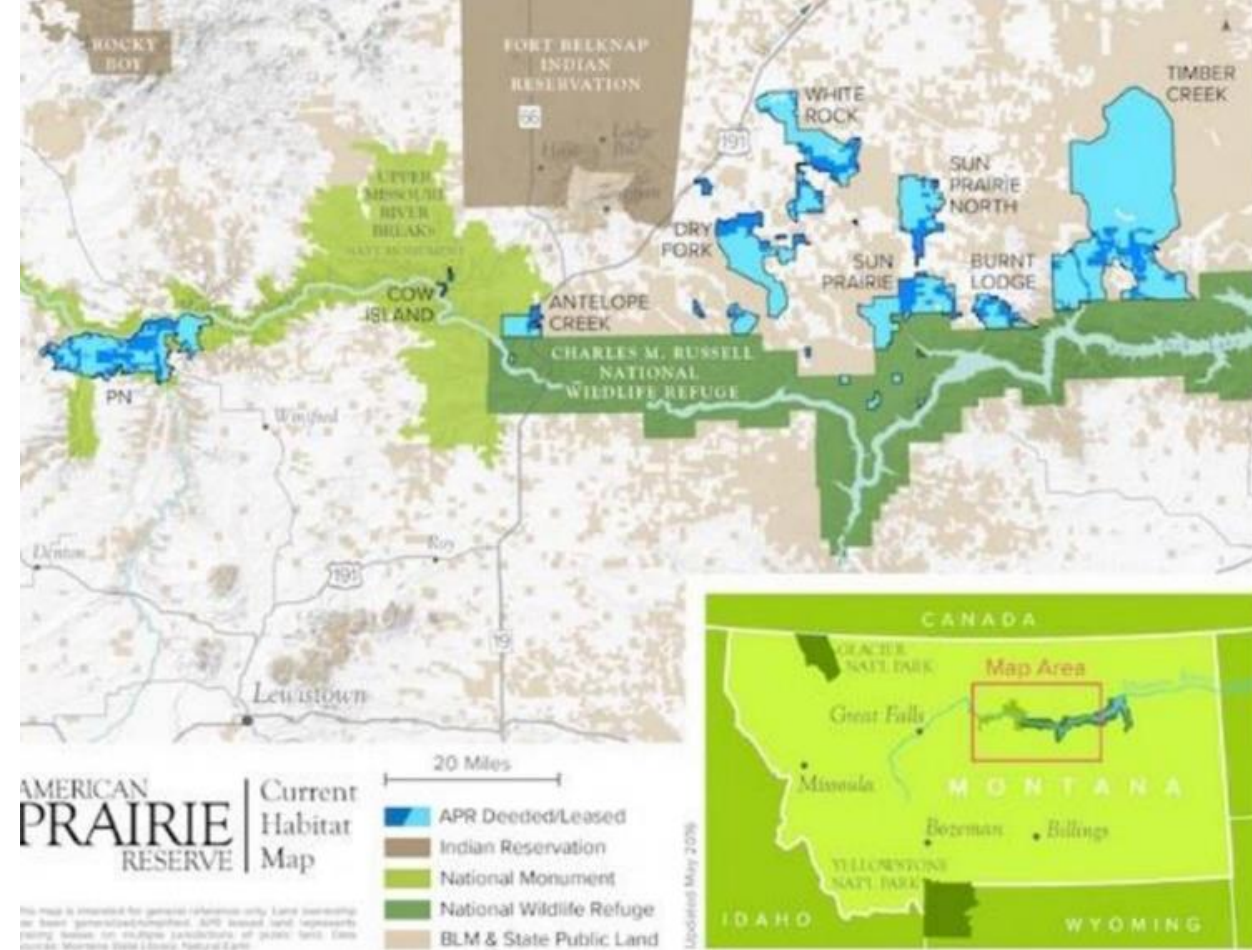
Why are These Perceptions, Attractions, and Amenity Qualities Important?



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

Survey respondents were provided information about the current state of the *American Prairie Reserve*

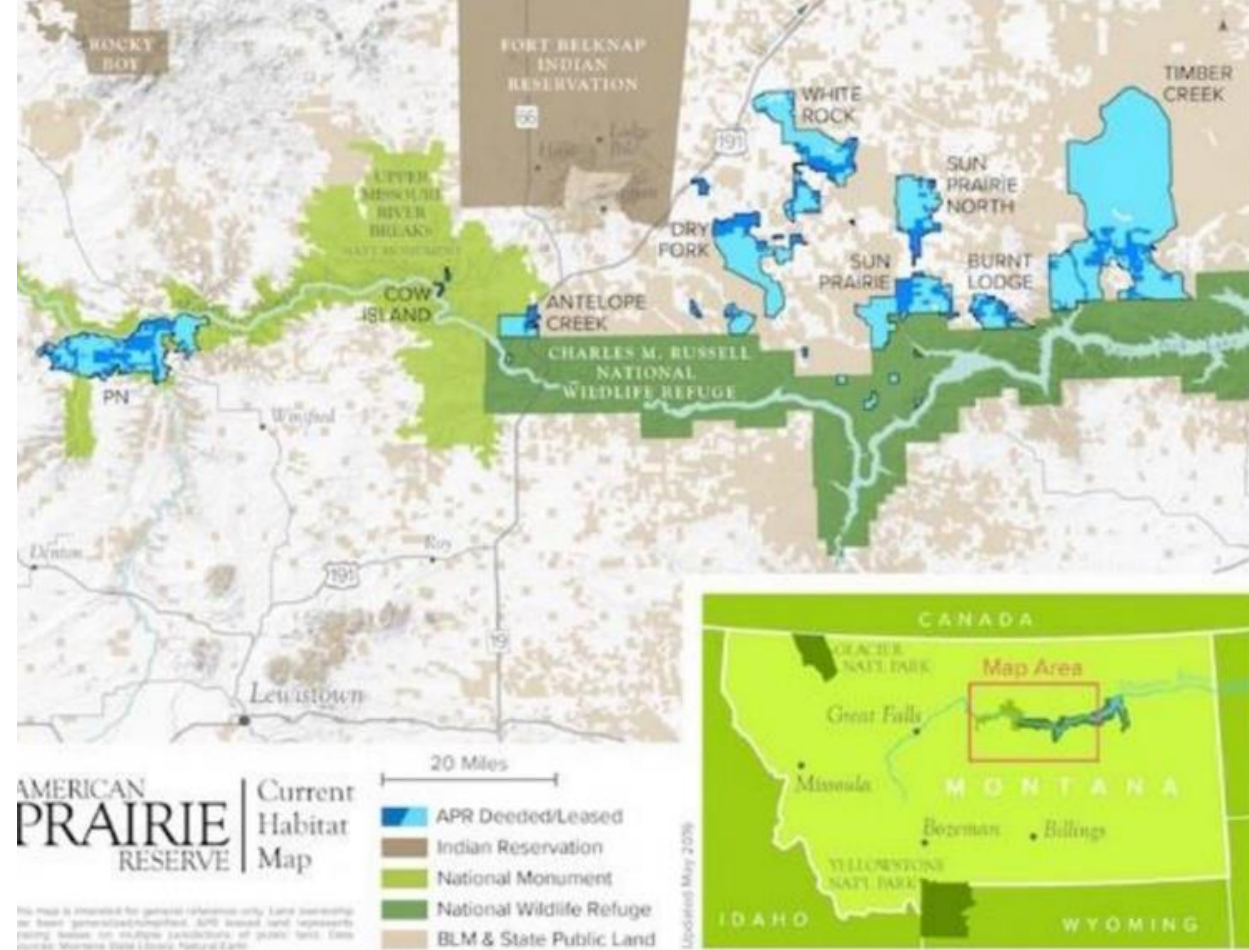
- *353,000 Acres of owned or leased land;*
- *Wildlife populations;*
- *Hunting;*
- *Accessibility;*
- *Camping, Yurts.*



- 80% of those already planning overnight visits would add more nights to visit the APR.
- 64% of those already planning day trips to the area would add more time to visit the APR.

Survey respondents were provided information about the current state of the *American Prairie Reserve*

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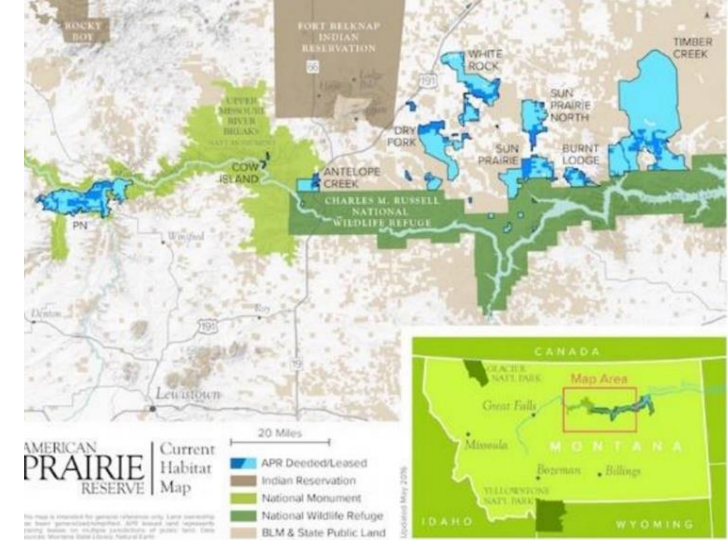
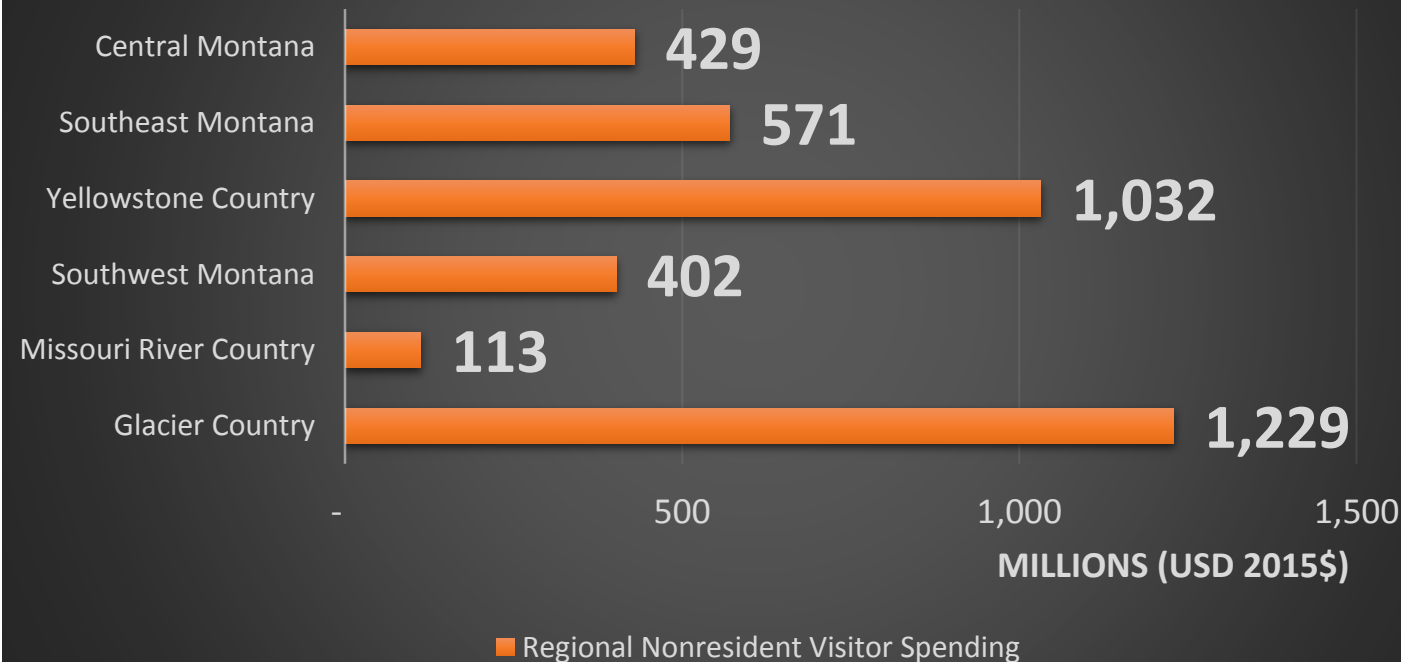


- Overall, 26% more visitors would plan to spend nights in the region to visit the APR.
- 15% more visitors would travel to or through the area on day trips to visit the APR.

Economic Response to this change

- *Pessimistic Response – 15% increase in Spending*
- *Optimistic Response – 46% increase in Spending*

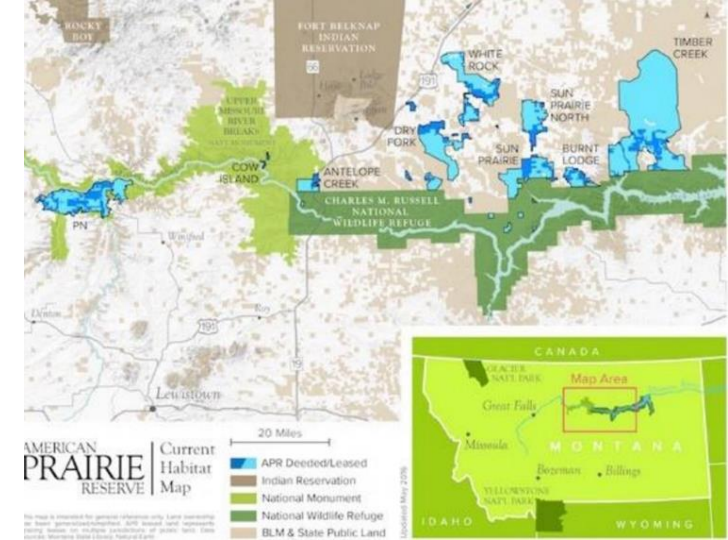
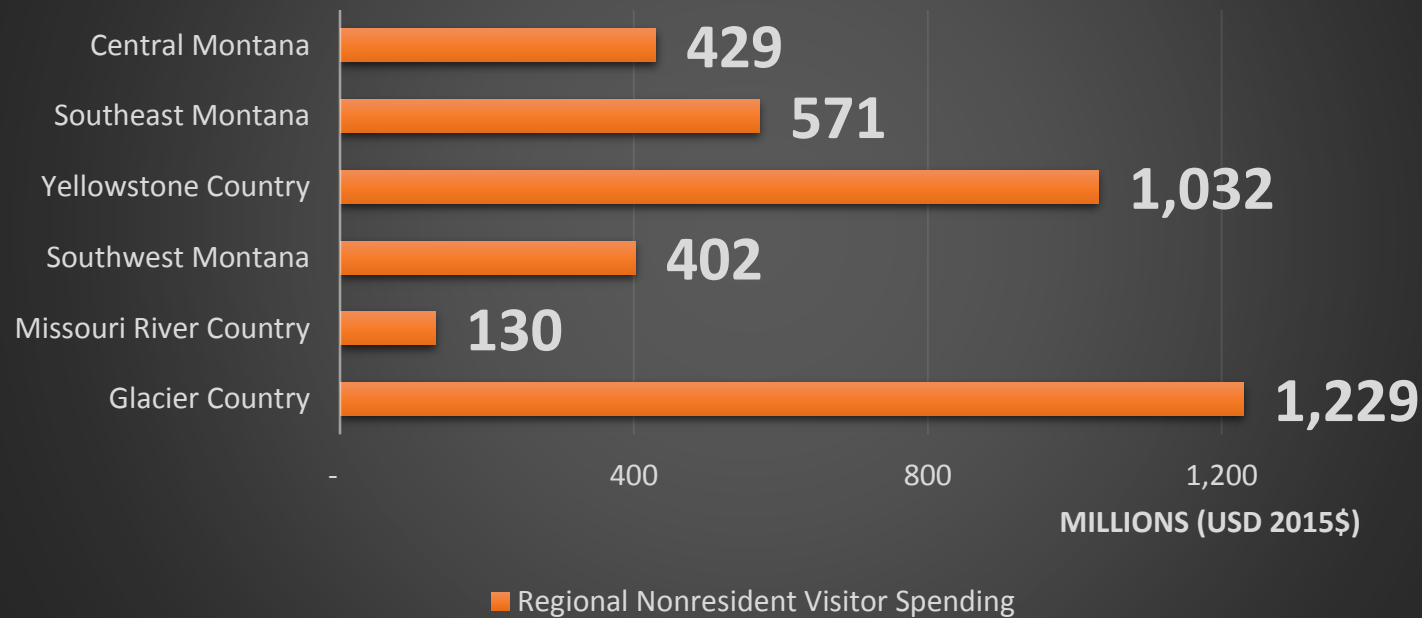
Regional Nonresident Visitor Spending



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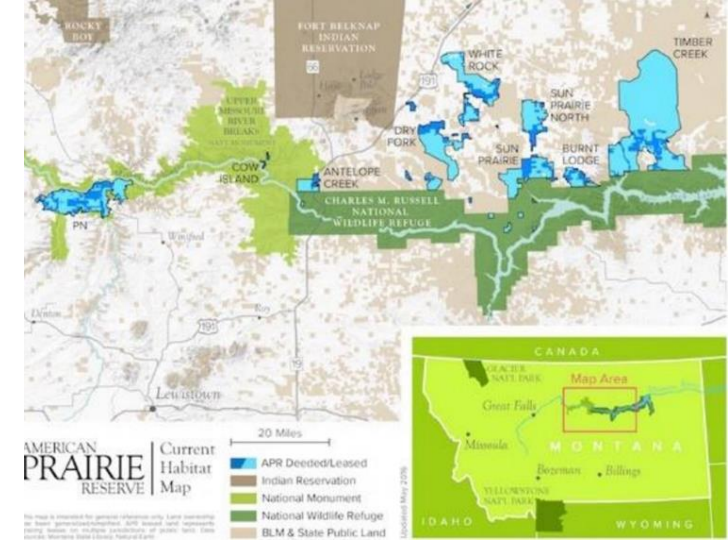
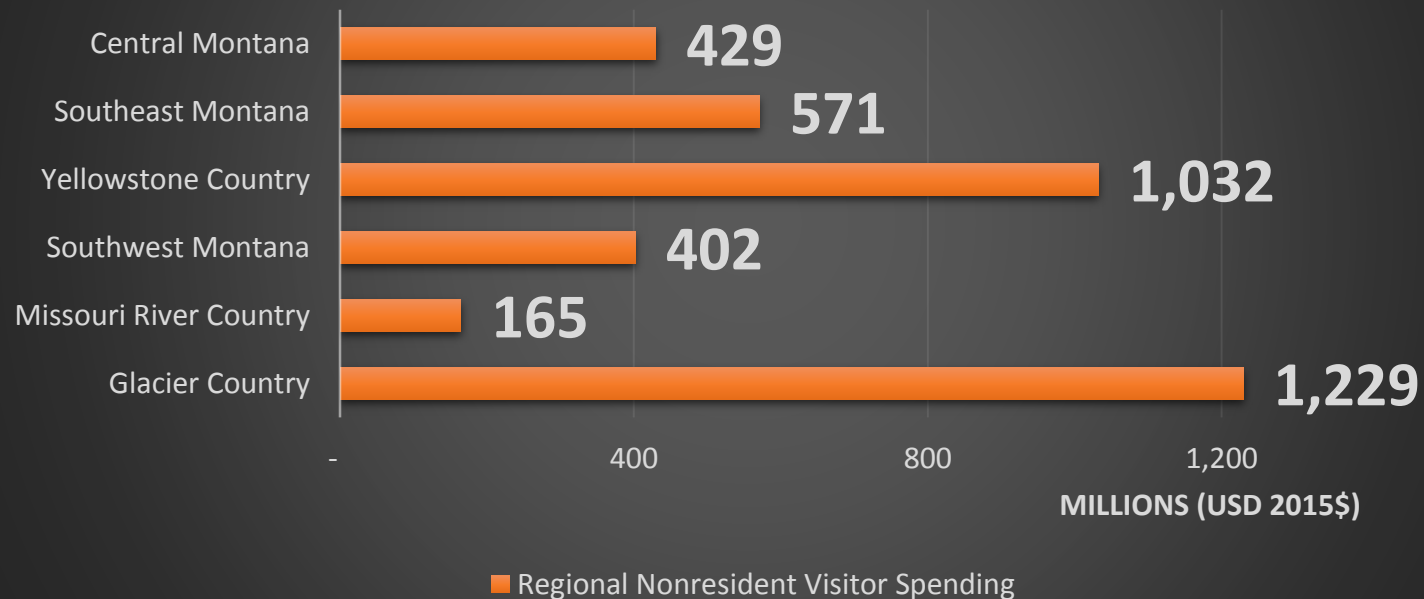
Regional Nonresident Visitor Spending 15% Increase in MRC



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Regional Nonresident Visitor Spending – 46% Increase in MRC



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.
 - Addressing this likely requires a collaborative effort between conservation oriented groups, tourism interests and the community at large.



Thank you!

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