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



Jeremy Sage, Ph.D. Economist & Associate Director PNREC – Bend, OR – May 24<sup>th</sup>, 2017

## TOURISM & RECREATION RESEARCH

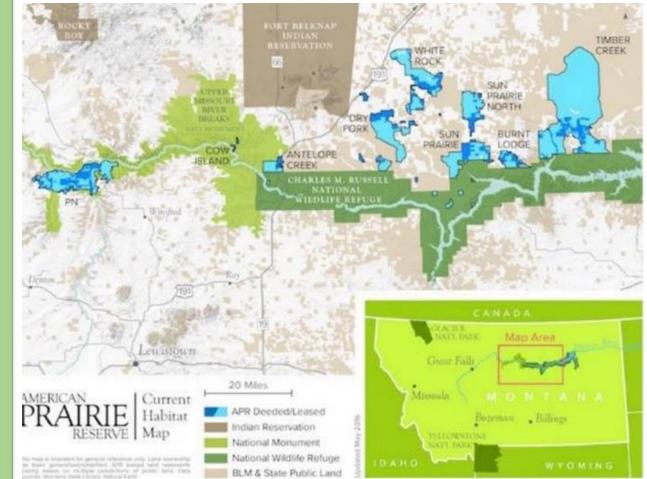
#### **Study Overview**

### Background

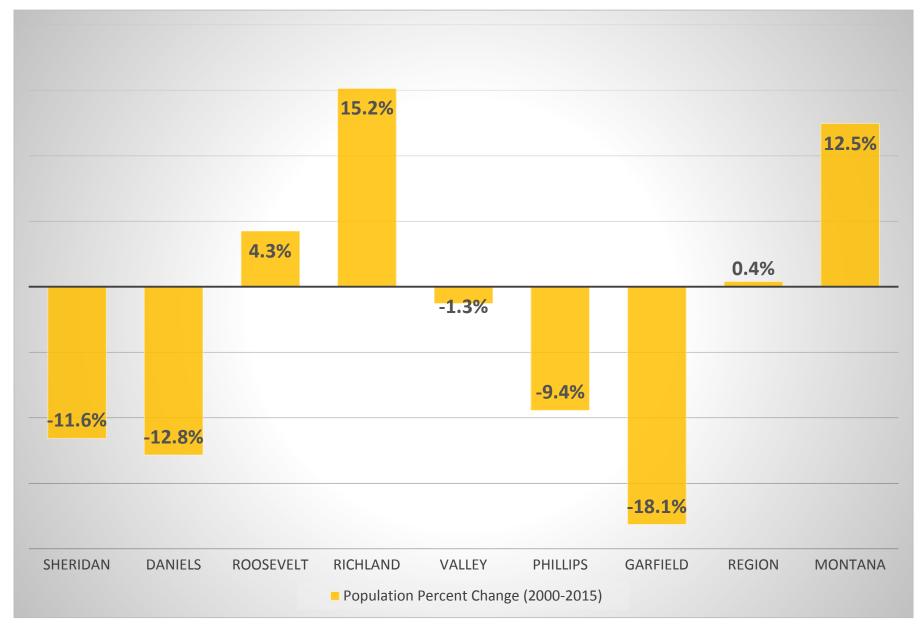
- Development of the American Prairie Reserve.
- National Wildlife Federation interest in the social and economic opportunities.

## Approach

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

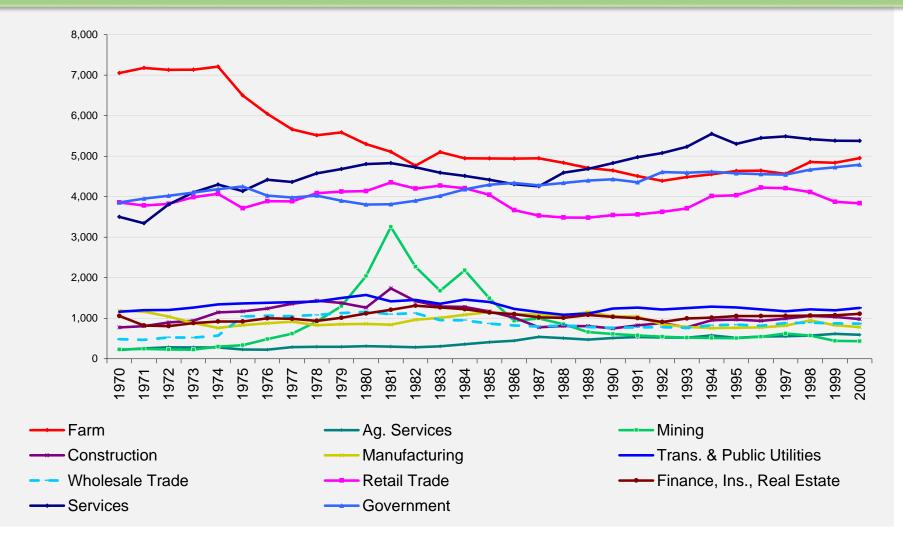


TOURISM & RECREATION RESEARCH



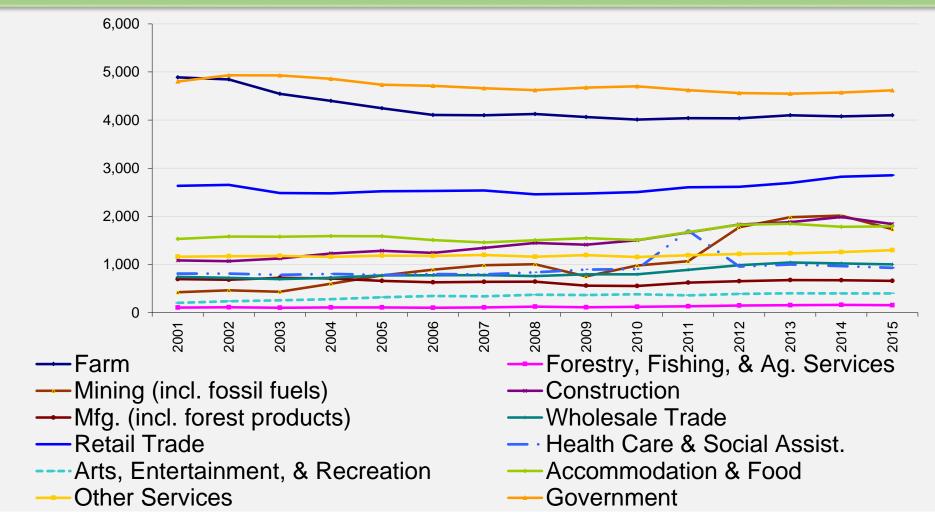
# TOURISM & RECREATION RESEARCH

## Employment by Industry (1970-2000)



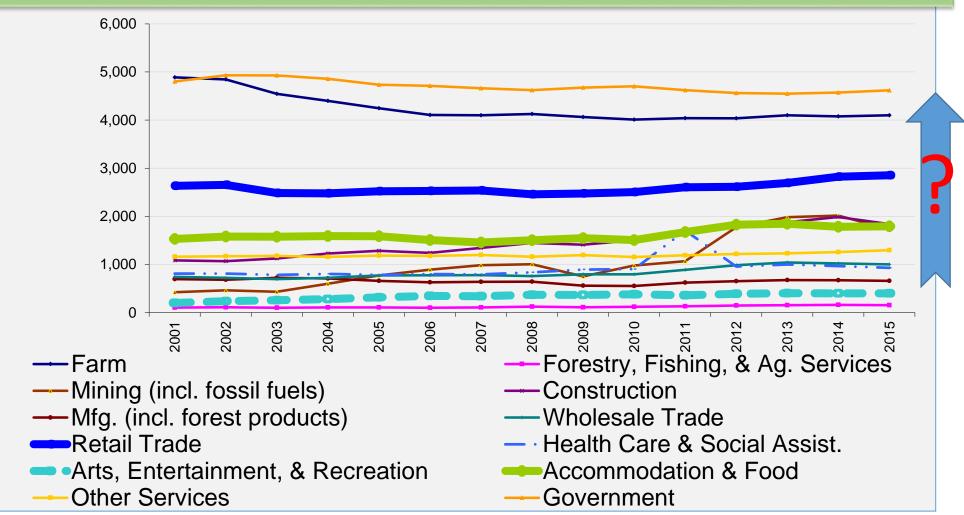


## Employment by Industry (2001-2015)



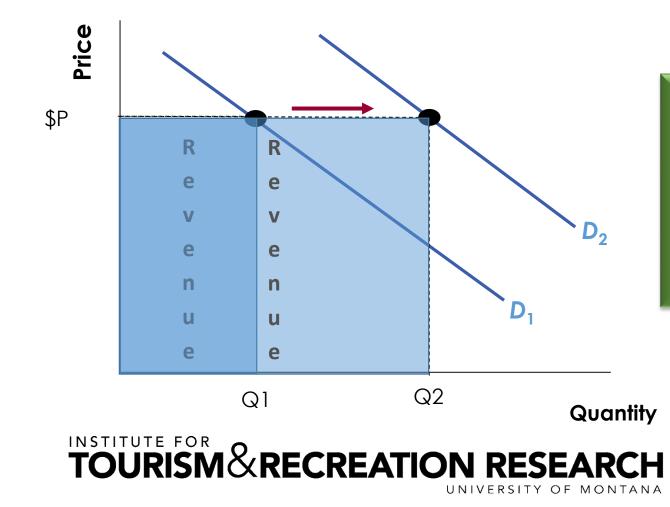


## Employment by Industry (2001-2015)





#### Shifting the Demand Curve Rightward

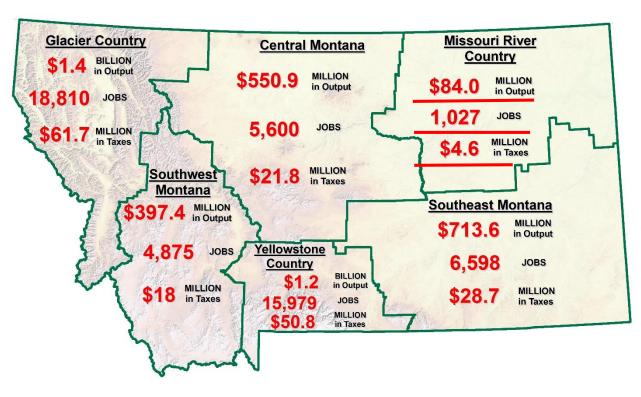


Attractions Perceptions Amenity Quality

#### **Demand Shift has Two Conceptual Pieces**

Expanding the Stay of Current Visitors

Inducing New Visitors to the Region





#### Who Are the Current Visitors?

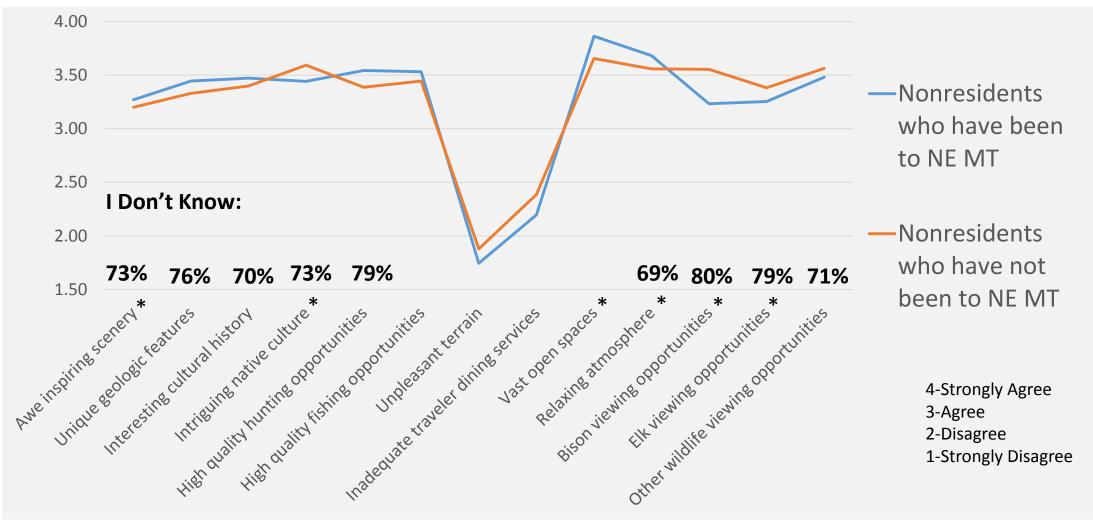
Nonresident Annual Survey

Top 10 Sites Visited		Top 10 Activities	
Glacier National Park	63%	Scenic Driving	64%
Fort Peck Lake	<b>29%</b>	Nature Photography	47%
Yellowstone	27%	Car/RV Camping	43%
Fort Peck Interpretive Center	15%	Wildlife Watching	37%
Other Montana State Parks	14%	Day Hiking	36%
C.M. Russell National Wildlife Refuge	11%	Recreational Shopping	26%
Little Bighorn Battlefield	10%	Visiting other Historical Sites	25%
Flathead Lake State Parks	9%	Visiting Museums	19%
Pompey's Pillar	7%	Visiting Lewis & Clark Sites	18%
Virginia/Nevada City	3%	Birding	9%

2014-2016 Average



## Perceptions of Northeast Montana

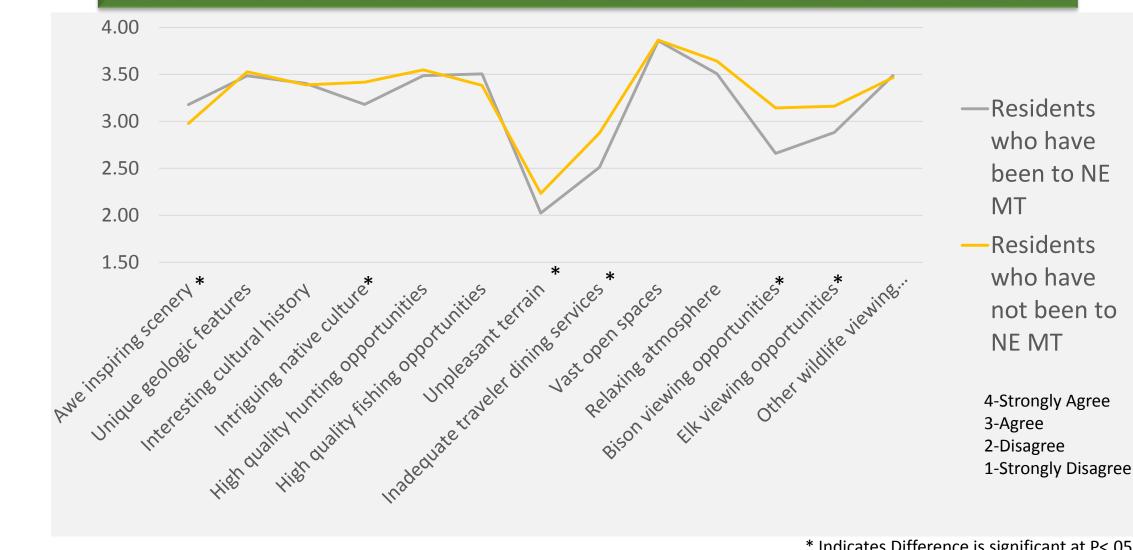


\* Indicates Difference is significant at P<.05

TOURISM & RECREATION RESEARCH

Northeast Montana has...

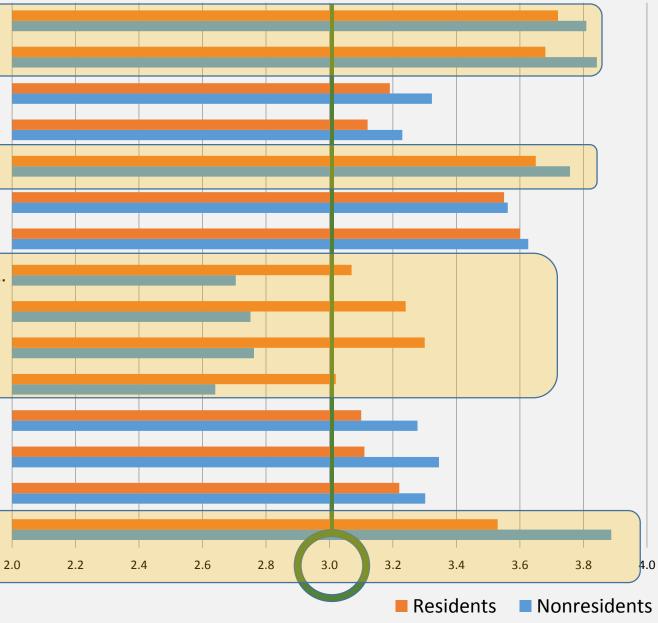
## Perceptions of Northeast Montana



\* Indicates Difference is significant at P<.05

TOURISM & RECREATION RESEA UNIVERSITY OF MONTANA

Northeast Montana has...



INSTITUTE FOR

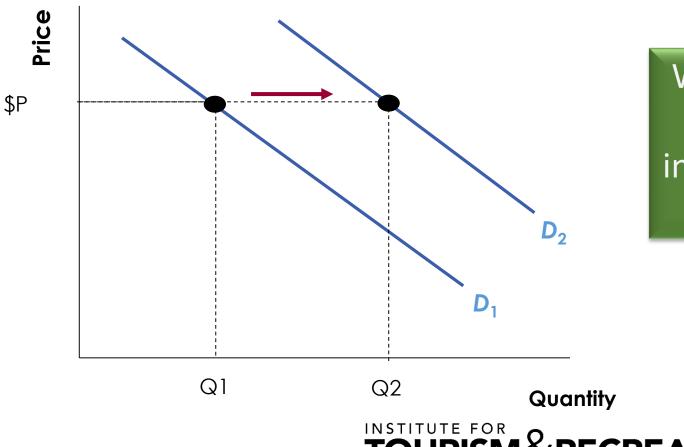
TOURISM & RECREATION RESEARCH

UNIVERSITY OF MONTANA

Improved dining opportunities in nearby communities Improved lodging opportunities in nearby communities Expanded trail system for biking/mountain biking Expanded trail system for horseback riding Expanded trail system for hiking/backpacking Increased roads throughout the reserve to enable wider accessibility Improved roadway surface (e.g. gravel or paved) Increased hunting opportunity for game birds and other small game... Increased hunting opportunity for other large game species Increased elk hunting opportunity Available bison hunting opportunity Guided, Safari-like, overnight adventures on the APR Guided, Safari-like, day adventures on the APR Developed farm and ranch based tourism activities A high likelihood of viewing free roaming bison

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

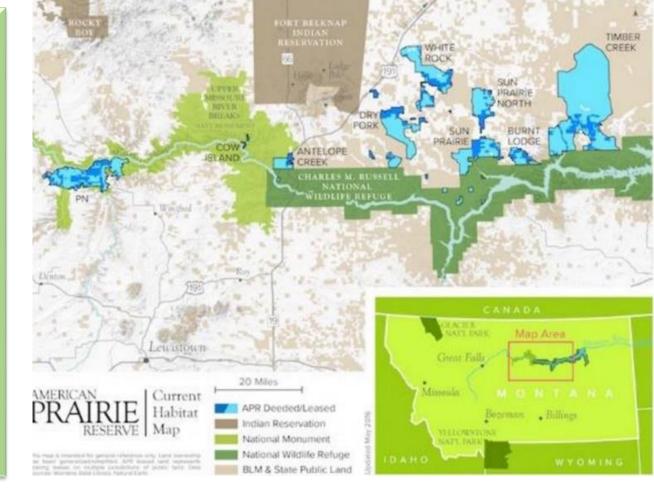
#### Why are These Perceptions, Attractions, and Amenity Qualities Important?



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

INSTITUTE FOR TOURISM&RECREATION RESEARCH 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.

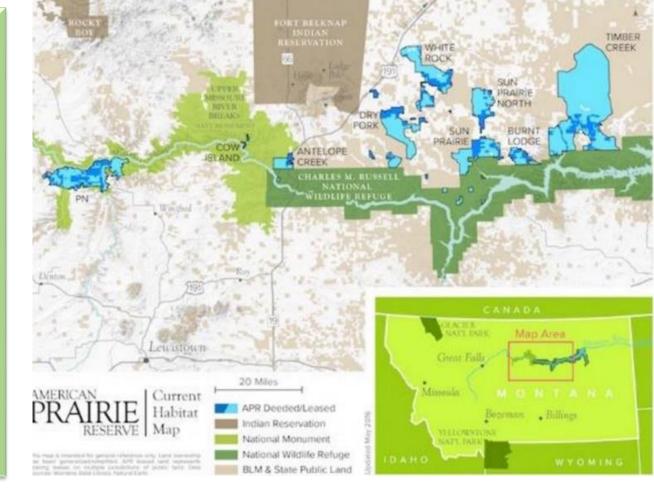


- 80% of those already planning overnight visits would add more nights to visit the APR.
- 64% of those already planning day trips to the area would add more time to visit the APR.



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

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

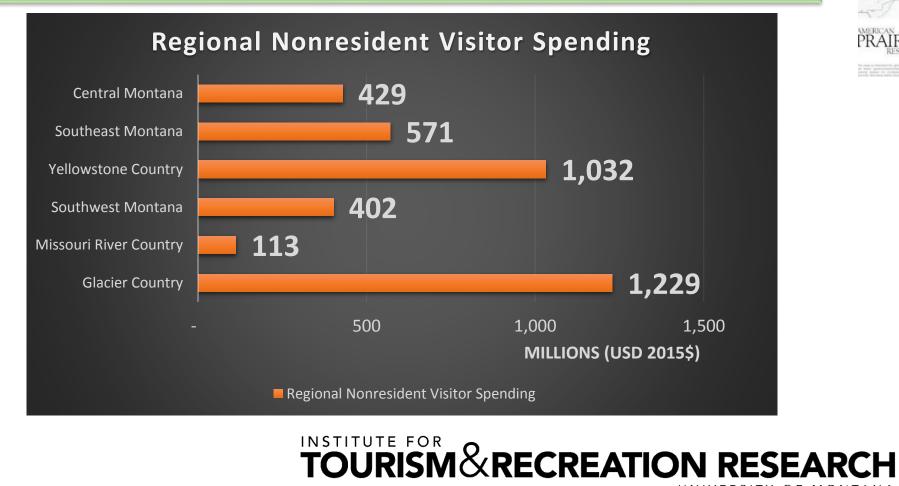


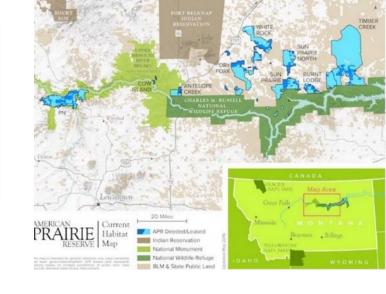
- Overall, 26% more visitors would plan to spend nights in the region to visit the APR.
- 15% more visitors would travel to or through the area on day trips to visit the APR.



#### **Economic Response to this change**

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





UNIVERSITY OF MONTANA

#### **Economic Response to this change**

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

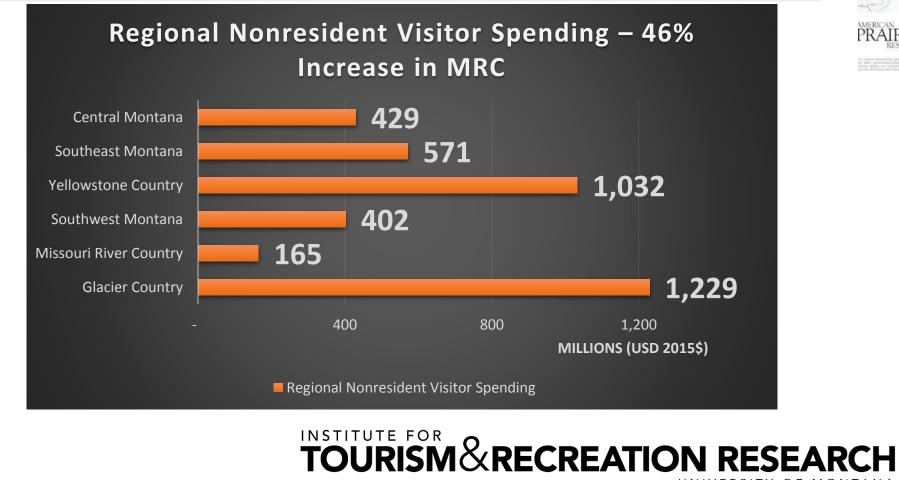


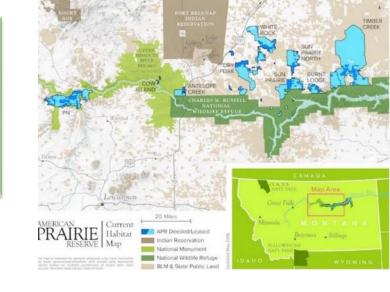




#### **Economic Response to this change**

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





UNIVERSITY OF MONTANA

## 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! www.itrr.umt.edu