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Travel and Recreation

Visitors Attracted to Open Space, Wildlife, and Character

by Norma P. Nickerson

It is safe to say that the reasons we all live in and love Montana are the same reasons that 3.4 million people choose to vacation in Montana each year—and why Montanans host nearly 2 million friends and family members who sleep in their spare bedrooms.

For years, data from UM's Institute for Tourism and Recreation Research (ITRR) has shown that nonresidents visiting Montana in the summer months are attracted to the two national parks, mountains, forests, open space, and uncrowded areas. Scenic driving, wildlife watching, nature photography, day hiking, and camping are the top five activities for nonresident vacationers. Two-thirds of overnight vacations are spent in the Glacier Country or Yellowstone Country travel regions. Almost half of the vacationers reside in the 11 western U.S. states or in the two western Canadian provinces, and 90 percent of nonresident summer visitors drive into the state.

In the winter months, nearly half of all vacationers to

Montana are here to ski or snowboard. Unlike summer months, 48 percent of nonresident skiers fly rather than drive into the state. The downhill ski industry provides a combined \$83 million to the state. Nonresidents represent 35 percent of skiers at Montana's ski areas.

In addition to summer and winter activities, many people come to Montana to take a trip with an outfitter and guide. In 2005, 319,000 people took guided trips, and only 10 percent were from Montana. While the combined economic impact of guided trips in 2005 was \$167 million, \$83 million was from nonresidents who came to Montana solely for the guided trip.

A recent ITRR study showed that certain attributes of Montana were important to nonresidents when visiting: clean waterways, clean air, wildlife viewing opportunities, scenic vistas, open space, an opportunity to view the night sky, and access to public lands and waterways (Table 1). Visitors were

Table 1
Top Montana Attributes Important to Nonresident Visitors

| Attributes | Mean Score |
|---|------------|
| Clean waterways | 5.5 |
| Clean air | 5.5 |
| Wildlife viewing opportunities | 5.4 |
| Scenic vistas | 5.4 |
| Amount of open space | 5.4 |
| Opportunity to view the night sky | 5.2 |
| Access to public lands | 5.2 |
| Access to waterways | 5.0 |
| Pedestrian-friendly atmosphere | 4.9 |
| Montana's land ethic | 4.7 |
| Main streets that reflect the local culture and heritage of the destination | 4.7 |
| Paths for walking and biking | 4.7 |
| Eating at restaurants where locals eat | 4.7 |

1= Not at All Important; 6= Extremely Important

Source: Institute for Tourism and Recreation Research, The University of Montana.

quite satisfied with the amount of open space, scenic driving opportunities, the “character” of Montana, the condition of the natural environment, wildlife viewing opportunities, a feeling of being welcomed, and the stewardship of the land (Table 2).

Common sense suggests that Montana residents, along with the tourism industry, should strive to maintain the open spaces, public land access, wildlife, and so forth. For the most part, Montana residents and tourism industry

business owners agree with the priorities of the tourism industry, albeit in a different order. Survey results indicate that the top priority for the industry was to “help maintain Montana’s destination appeal,” but residents rated it sixth out of seven listed priorities. Residents’ top priority was for the industry to hire local people, but tourism business owners rated it fourth out of seven priorities. However, each of the seven listed priorities had a mean above 3.6 on a 5-point scale, indicating that all were priorities (Figure 1).

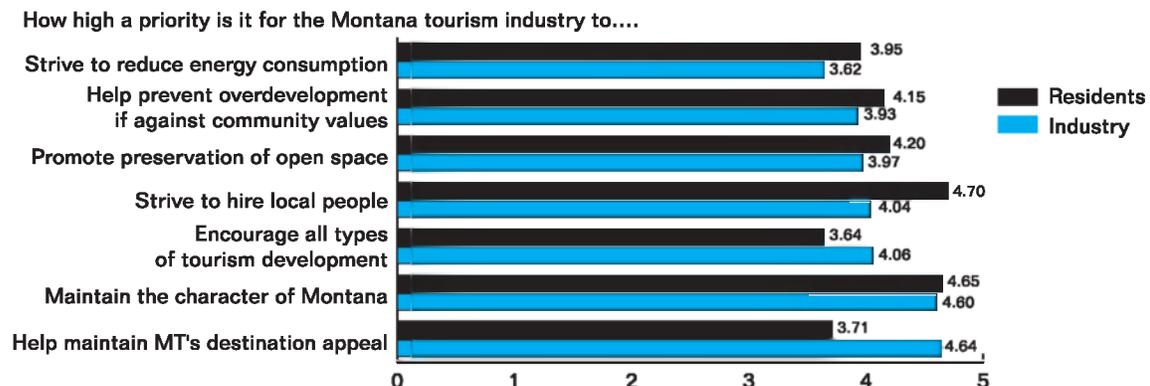
Table 2
Nonresident Visitor Satisfaction with Montana Attributes

| Please rate your overall satisfaction with the following aspects of Montana: | |
|--|------|
| Amount of open space | 5.67 |
| Scenic driving opportunities | 5.64 |
| The "character" of Montana | 5.57 |
| Condition of natural environment | 5.51 |
| Wildlife viewing opportunities | 5.44 |
| A feeling of being welcomed | 5.43 |
| Stewardship of the land | 5.38 |
| A feeling of authenticity | 5.37 |
| Availability of travel information | 5.26 |
| Main streets reflecting local culture/heritage | 5.26 |
| Variety of lodging choices | 5.24 |
| Access to public lands | 5.22 |
| Amount of historical roadside information | 5.22 |
| Availability of local arts and crafts | 5.19 |
| Directional road signage | 5.17 |
| Restaurants with local products | 5.14 |
| Environmental practices of accommodations | 5.02 |
| Road conditions | 5.02 |
| Highway rest areas | 5.00 |
| Availability of recycling bins | 4.25 |

Scale: 1= Very Dissatisfied; 6= Very Satisfied

Source: Source: Institute for Tourism and Recreation Research, The University of Montana.

Figure 1
Top Priorities for Tourism Industries, Responses by Montana Residents and Montana Tourism Business Owners



Scale: 1=very low priority; 5=very high priority

Source: Institute for Tourism and Recreation Research, The University of Montana.

The Scorecard Past and Future

Preliminary numbers for nonresident travel in Montana show an increase of 4 percent in 2010 over 2009. Nationally, domestic leisure travel estimates show an increase of nearly 3 percent while domestic business travel appears to have increased 4 percent in 2010. Here are some more facts on travel and recreation:

- Montana airline travel was up 2 percent in 2010 while the national rate was flat.
- Glacier National Park visitation increased 8.9 percent and Yellowstone increased 8.3 percent, while all U.S. national parks were down nearly 1 percent in 2010.
- Rooms sold in Montana were up 5.6 percent in 2010 while rooms sold throughout the nation were up 7.6 percent.
- Montana skier visits were up 2.3 percent for 2009-10 while national skier visits were up 4.2 percent.
- 2009 nonresident travel industry had a \$1.5 billion direct impact and a \$2.3 billion total impact.
- 2009 nonresident travel industry income had a \$447 million direct impact and a \$661 million total impact.
- 2009 nonresident travel industry employment amounted to 19,160 direct jobs and 25,480 total jobs.

2011 Forecast

The tourism industry will experience increases in 2011 including:

- Nonresident visitor numbers will increase by 2 percent.
- Rooms sold (hotel/motel) will increase by 1.5 percent.
- Yellowstone National Park visitation will increase by 3.3 percent.
- Glacier National Park visitation will increase by 0.3 percent.
- Skier visits will increase by 2 percent.
- Airline travel will increase by 1 percent.

Table 3
Montana Tourism Charter

| |
|---|
| Maintain integrity of place and destination appeal. |
| Promote and highlight the businesses, services, and opportunities that are unique to Montana. |
| Promote sustainable resource conservation, including conservation of energy, water, and wildlife. |
| Participate in and help lead community stewardship partnerships to maintain Montana assets. |
| Identify and appeal to markets that value and seek to help sustain Montana's distinct character. |
| Foster a diversity of products and services that meet the demand of a demographic cross-section of the "geotourist market." |
| Ensure visitor satisfaction and an enduring market demand through education of Montana residents about the benefits of sustainable tourism |
| Work with the Institute for Tourism and Recreation Research, Travel Montana, and other tourism organizations throughout the state to evaluate effective implementation of the Tourism Charter. |

Source: Montana Tourism Charter (2007). Accessed January 4, 2011.
<http://travelmontana.mt.gov/charter/>.

Geotourism

One marketing and promotion strategy that is growing popular throughout the tourism industry is geotourism, which incorporates the concept of sustainable tourism—that destinations should remain unspoiled for future generations—while protecting a place's character.

In Montana, two geotourism map guides have been developed for the Crown of the Continent area (Glacier National Park vicinity) and the Greater Yellowstone area. Local input was important in generating these maps, which encourage travelers to visit locally owned businesses and attractions. Additionally, the tourism industry has created a Montana Tourism Charter centered around geotourism principles (Table 3). Communities, organizations, and businesses are being asked to sign onto the charter espousing sustainability in their operations and thereby empowering locals in community development. ITRR research has shown that visitors to Montana have geotourism tendencies and are more likely to share the same values that Montana residents do concerning the environment, the communities, and the landscapes. All of this advocates that Montanans have the power to direct the type of tourism development in line with the values of people in the state which, in turn, draws people to visit who hold the same values.

Future and Challenges

In late 2010, 357 tourism business owners and organizations responded to the annual ITRR outlook survey. Here are comments about some of the challenges facing the industry and Montana as a whole:

Land use and natural resource planning

- Should we be managing the wolves so elk aren't endangered?
- Montana's niche of open space, wildlife, and fisheries is like nowhere else in the Lower 48. ... It's high time that land-use planning becomes this state's focus.
- Maintain the multiple-use concept in Montana—we are losing business by eliminating where folks can snowmobile and drive their four-wheelers.
- Green/sustainable practices are wanted, but Montana businesses are not doing it. What are the barriers?
- As long as the Missouri River continues to produce the blue-ribbon trout that our guests are catching, our business will continue.
- Recycling is too expensive, and the efforts for biodegradable items are lost when thrown in a plastic garbage bag. Wind, solar, and hydro power should be the focused green direction.

Policy and infrastructure

- Initiative 161 assaulted the outfitter business and livelihoods. Montana needs to support small business like outfitting, not make it more difficult. We are sending out the message loud and clear that nonresident hunters are not welcome.
- Montana needs lower airline prices to encourage visitation and maintain residents' ability to travel.
- Couldn't we fund state parks, national parks, forests, and other public land agencies so they can provide interpretation? The more people learn, the more likely they will return. Visitors want to "gawk" less and learn more.

Economy

- Finding local help for entry level work is near to impossible. Is there a fix?
- If the U.S. dollar remains tepid, we will get more international visitors, especially from Canada. Is this a solution to our economy—be the bargain country for visitors?

- If we had more big businesses in Montana we would have more visitors coming here.
- The economy is killing small business like ours that don't deal with high-end spenders. The present economic climate is crushing the middle class who are our main business clients.
- People are coming but spending less. Will this change?
- With 10 million nonresidents spending money in Montana, is it time to look at a sales tax so visitors can help us out?

Marketing

- Is the travel region concept still valid today? Should bed tax monies go directly to communities rather than to a region? Are we duplicating efforts?
- What kind of marketing could increase bookings from October to May? We generally have decent weather in October, April, and May yet it's hard to entice folks.

It is difficult to summarize the multitude of issues and challenges facing the tourism industry in Montana. However, 2011 will be a better year than 2010 in terms of visitation. As Table 4 shows, 55 percent of business owners are expecting an increase in 2011 while only 8 percent are expecting a decrease. The travel industry is focusing on enticing visitors who will support local economies, encourage local business, and value the landscape as Montanans do. As long as visitors and residents have the same values, Montana tourism will grow in a manner appreciated by everyone.

Table 4
Business Owner Projections Over the Years

| Projected Year | Expect an increase | Expect to remain the same | Expect a decrease |
|----------------|--------------------|---------------------------|-------------------|
| 2011 | 55% | 37% | 8% |
| 2010 | 47% | 42% | 12% |
| 2009 | 32% | 39% | 27% |
| 2008 | 55% | 34% | 10% |
| 2007 | 64% | 31% | 5% |
| 2006 | 63% | 31% | 6% |
| 2005 | 67% | 26% | 7% |
| 2004 | 79% | 18% | 3% |
| 2003 | 70% | 22% | 8% |
| 2002 | 56% | 33% | 10% |

Source: Institute for Tourism and Recreation Research, The University of Montana.