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Understanding Visitor Recreation Experiences on Montana's Public Lands

BY KARA GRAU, MEGAN SCHULTZ, GLENNA BROWN, AND MELISSA WEDDELL

The grandeur of Montana's public lands attracts visitors from all over the world who want to experience the beautiful parks, wilderness, wildlife, and waters. Montana is ranked 10th in the nation in federal land ownership, with about 30% or 27 million acres, followed by state agencies that manage a little over 5 million acres. Moreover, Montana is the gateway to the iconic Glacier and Yellowstone National Parks.

During the COVID-19 pandemic, Montana's public lands saw unprecedented visitation as both residents and nonresidents sought outdoor experiences. In response to the high visitation to Montana public lands, the Institute for Tourism and Recreation Research (ITRR) asked nonresident visitors about their recreation experiences, use of public lands, and trip planning. Public lands were defined as state parks, fishing access sites, national park sites, national Forest Service lands, and Bureau of Land Management areas. Nonresident

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travelers interviewed by institute surveyors around the state were given this survey along with the Nonresident Travel Survey, after completing an in-person "Front End" survey at a gas station, rest area, or airport. Current and historical nonresident travel data can be viewed by clicking on Interactive

Data on ITRR's website. (itrr.umt.edu). Data included here were collected from late May 2021 through June 2022.

During the survey period, 1,327 surveys were collected. Among respondents, the average age was 56 years old, with 45% of the sample being female and 55% male. The average travel group size was 2.2 people, with couples (42%), self (26%), and immediate family (21%) making up the majority of groups. On average, visitors stayed in Montana for 5.7 nights. Vacation (39%) and visiting friends or relatives (27%) brought the majority of these

visitors to the state, while 20% indicated they were primarily passing through Montana. The remaining 14% were in the state for business (9%), shopping (<1%), or other reasons (4%).

Visitation, Motivations, and Expectations

Most of the survey sample had visited Montana (79%) at least once before their current trip, and over 60% of repeat visitors had previously visited more than five times as adults. More than half of repeat visitors chose to visit new public land areas in Montana. Among the first-time visitors, 70% of them had wanted to visit Montana for a year or more and 11% said it was a lifelong dream. For nearly 60% of respondents, Montana was the main destination for their travels, while 23% reported Montana was one of several destinations, and 15% considered themselves just passing through.

When analyzing over 600 open-ended responses from first-time visitors, the top motivations for their trip were a general desire to travel, to take a road trip, and to have family vacation bonding time. The second-largest category was a desire to see either Glacier or Yellowstone National Park. Respondents expected to see beautiful scenery, mountains, stunning landscapes, scenic views, and wide-open spaces. In addition,

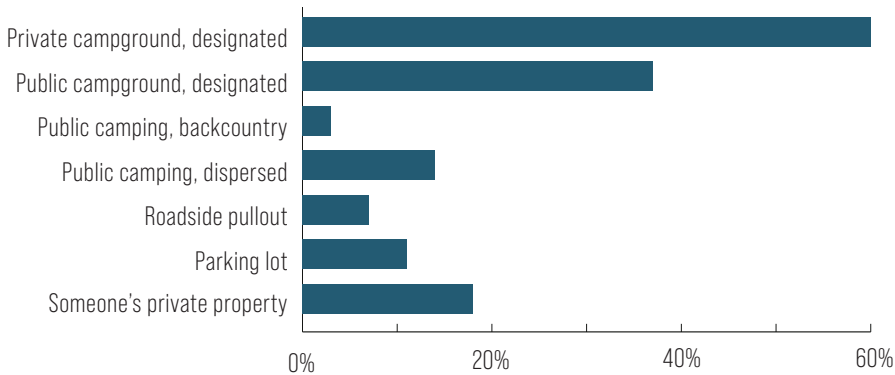


Photos Courtesy of the National Park Service

they expected outdoor opportunities that included recreation, wildlife sightings, and wilderness experiences, as well as the chance for relaxation and peacefulness. Visitors reported that weather conditions, like smoke and heat, were not what they expected, along with park ticketing, limited cell service, and a lack of taxis. Most respondents commented that Montana exceeded their expectations, referring to the beautiful scenery,

vistas, and amazing mountains. Other positive comments included our water irrigation, vibrant shops, and the friendliness of Montanans. ITRR gathered 800 responses from repeat visitors, who stated their reasons for visiting a new location in Montana included the desire to explore, to experience new places, and to have new adventures. Respondents explained that their public land experiences met their expectations

FIGURE 1 CAMPING LOCATIONS



Source: The Institute for Tourism and Recreation Research.

with our beautiful and peaceful scenery; clean, accessible, and well-cared-for public lands; and abundant outdoor recreation opportunities.

Montana Campgrounds

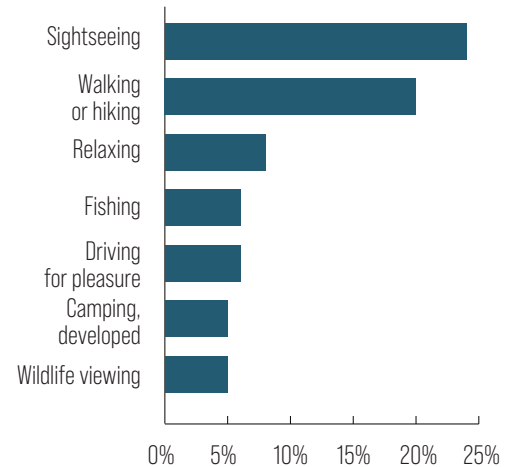
Of the majority of visitors who camped in Montana, 60% stayed in a private campground, 37% on public lands (developed), 18% on private property, and 14% on dispersed public lands (Figure 1). Most who camped did not attempt to use a public lands reservation system to book a campsite (i.e., ReserveAmerica.com, Recreation.gov); however,

about 30% did. Of the travelers who camped, 13% had difficulty finding available camping on Montana public lands, 21% successfully used a public lands reservation system to book a campsite, 8% used one but unsuccessfully, and 71% did not use an online reservation system.

Public Land Activities & Uses

During the 12 months before completing the survey, 10% of respondents had visited Montana public lands once, 25% had visited two to five times, and just 8% had

FIGURE 2 PRIMARY ACTIVITIES ON PUBLIC LANDS



Source: The Institute for Tourism and Recreation Research.

visited six or more times. Over half of those who had visited public lands in the past 12 months went somewhere in the state that was new to them during their recent trip. When asked why they visited a new Montana location, respondents stated they wanted to explore new locations (90%), and 43% said they had more time to explore. Twenty-one percent of respondents indicated there were public land activities they wanted to participate in but could not do so for various reasons, including: not having enough time (54%); not owning



gear (14%); and finding the activity too expensive (11%). While many respondents selected from the reasons provided, 43% reported “other” as a reason, which included responses about wildfire, smoke, and related restrictions; inclement weather; crowding or lack of parking; and difficulty obtaining Glacier National Park tickets. All respondents were asked about their activities and use of public lands in Montana, and the top activities visitors participated in were sightseeing, walking/hiking, relaxing, and fishing (Figure 2).

Public Lands Experience

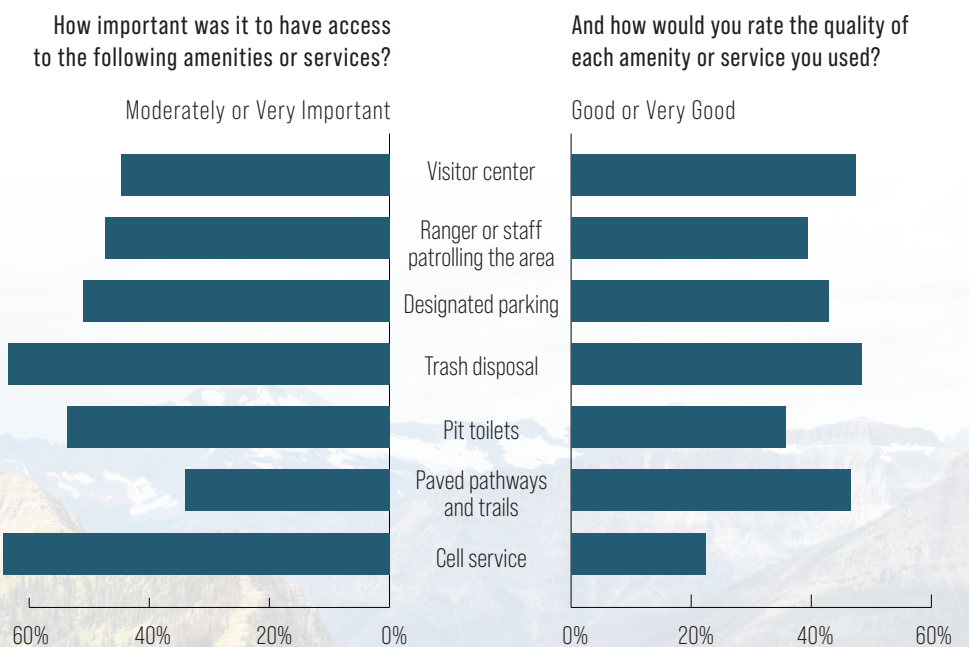
An overwhelming number of visitors to Montana public lands felt their experience met their expectations (97%), and 82% were very willing to recommend their most recent public lands experience to a friend. With an apparent increase in “new types” of visitors to public lands during the Covid-19 pandemic, land managers were specifically

interested in how these individuals were learning about what to do, or not do, while recreating. Respondents were asked how they learned about the rules and regulations for public lands use in Montana. Almost 40% said posted materials at a site were used, and for repeat visitors, they relied on past visits to an area. Twenty percent noted that staff or volunteers on-site helped convey the rules and regulations of an area, and 50% stated that a ranger/staff was important. When visitors were asked for comments about what avenue would be most effective for managers to communicate rules/regulations about public lands, the majority felt that having information in print and/or on-site was most effective. This

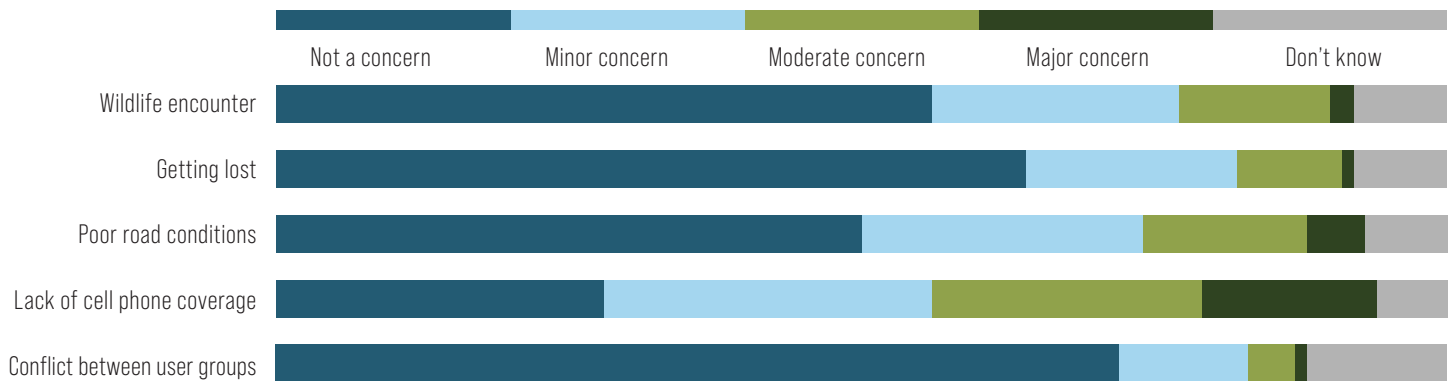
included signs, brochures, and on-site staff. About one third of respondents felt that online information was best. This included agency websites and social media. This information is important for agencies to show that one out of five visitors learns proper land-use etiquette from someone on-site (Figure 2). Staffing our public lands is of utmost importance during increased use.

Respondents were asked about the amenities or services they used on Montana public lands as well as safety concerns they had. Almost three-fourths of the respondents reported that cell service was important, but only 25% stated that the quality of service was good or very good. Next to cell service,

FIGURE 3 SELECTED SURVEY RESULTS ABOUT RECENT VISITS TO MONTANA



Source: The Institute for Tourism and Recreation Research.

FIGURE 4 SAFETY CONCERNS WHILE VISITING MONTANA PUBLIC LANDS

Source: The Institute for Tourism and Recreation Research.

pit toilets and parking were also rated as highly important. A few safety concerns some visitors had, along with their level of concern on Montana public lands, are displayed in Figure 3. Again, lack of cell service ranked as the highest level of concern regarding safety, with road conditions and wildlife encounters following.

The Montana Public Land Experience

Public lands and waters are central to the Montanans' quality of life and the main driver of the tourism and outdoor recreation economies. During the Covid-19 pandemic, when indoor restrictions occurred, people recreated outdoors, causing unprecedented public land visitation. Nationally more than half (54%) of Americans ages 6 and over participated in at least one outdoor activity in 2021, and the outdoor recreation participant base grew by 2.2% in 2021 to 164.2 million participants, according to the Outdoor

Industry Association. During this time, Montana's outdoor recreation economy grew nearly 30% and saw a 29.5% growth in participants in outdoor recreational activities from 2020-2021, according to the Bureau of Economic Analysis. Furthermore, in 2021 inflation-adjusted ("real") GDP for the outdoor recreation economy increased 18.9%, compared with a 5.9% increase for the overall U.S. economy. Real gross output for the outdoor recreation economy increased by 21.7%, while outdoor recreation compensation increased by 16.2%, and employment increased by 13.1%. Montana had the second-highest state level value added, behind Hawaii, for outdoor recreation as a share of the state GDP with 4.4% and had an 18.1% increase in outdoor recreation employment. These numbers reinforce that public lands and water are central to Montana's thriving tourism and outdoor recreation, and therefore need understanding and protection. ■

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