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Carter Bermingham
Megan Schultz
Matthew Pettigrew
Glenna Brown

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QUARTERLY MONTANA RESIDENT REPORT

2022 RESIDENT VISITATION: YELLOWSTONE NATIONAL PARK & GLACIER NATIONAL PARK

CARTER BERMINGHAM, MEGAN SCHULTZ, MATTHEW PETTIGREW & GLENA BROWN

Quarterly Montana Resident Report / 1st Quarter: January - April 2023

Grand Prismatic Spring, Yellowstone National Park - *All photos are public domain and courtesy of the National Park Service
The Institute for Tourism and Recreation Research (ITRR) was created in 1987 to conduct research on travel, recreation, and tourism for the state of Montana. Located in the W.A. Franke College of Forestry and Conservation at the University of Montana, ITRR serves as the research arm for Montana’s tourism and recreation industry. Our mission is to provide information that will help the industry make informed decisions about planning, promotion, and management, assisting both private firms and public agencies. ITRR conducts resident studies on a quarterly basis to better understand current topics from a resident perspective and to gauge residents’ attitude and opinions towards the tourism industry on an annual basis.

This particular study was conducted to better understand resident visitation to the national parks in the state, and to also understand some of the obstacles that may have prevented residents from visiting the parks in 2022. This report includes information on monthly visitation to both Glacier and Yellowstone national parks, as well as the number of respondents who were deterred by the flooding in Yellowstone and the ticketed-entry system in Glacier. The report also includes demographic information as well as analysis conducted at the regional level on the following areas: Glacier Country, Southwest Montana, Central Montana, Yellowstone Country, Southeast Montana, and Missouri River Country.

For access to the complete report, visit our interactive dashboard at: https://tableau.mus.edu/missoula/views/ResidentSurveyQ1-2023/Page1ParksVisited?%3Aembed=y&%3AisGuestRedirectFromVizportal=y

**METHODS**

Data were collected by trained surveyors who asked questions to Montanans as they filled up their vehicle with fuel at gas stations or when they stopped at rest areas around the state. ITRR has permission from over 100 gas stations across the state to talk to residents during the time it takes them to fill their tank. From January 1st to April 28th, 2023, any Montanan 18 years of age or older at these locations had an opportunity to be surveyed about their visitation to Glacier National Park and Yellowstone National Park during 2022, among other topics. The respondent data were weighted by the county of residence and gender from the US Census, thus providing a representative sample reflecting the geographic population and gender of the state.
A total of 6,892 Montana residents were surveyed from January 1st - April 28th, 2023 regarding their visitation to Glacier and Yellowstone National Parks in 2022. Respondents from all 56 Montana counties participated in the survey. Missoula County and the Glacier Country travel region represented the highest proportion of residents surveyed during the first quarter. A map of the travel regions is presented above with the number of respondents from each region.

Close to half of all respondents (46%) reported living in their current community for over 20 years. One in five respondents (20%) reported living in their current community for 11-20 years, followed by 16% at 6-10 years, and 14% at 1-5 years. Less than 5% of respondents (4%) reported living in their current community in Montana for less than one year.

The largest age cohort represented in the survey were respondents between the ages of 50 - 59 years old, accounting for 20% of all respondents. Those between 40-49 represented 19% of all respondents, followed by 18% of respondents who were 30-39 and 60-69, respectively. In addition, the gender split was nearly even after applying census weighting, with women representing 48% of respondents while men made up the other 52%.
On June 13th, 2022, Yellowstone National Park (YNP) experienced an unprecedented flood event, with extreme combinations of both rain and snow destroying roadways and infrastructure within the park. Several of the surrounding gateway communities like Gardiner, Red Lodge, and Cooke City, MT faced significant damage to their water lines and sewer systems, as well as community roads and bridges, effectively leaving several communities temporarily cut off from the park.

Although the recovery efforts by the park and local gateway communities were quick and extensive, visitation for YNP during the 2022 season was down roughly 32% from the previous year (it should be noted that visitation in YNP for 2021 was the highest on record, with nearly 5,000,000 visitors entering the park for the year)*. Traffic counts at both the North Entrance and Northeast Entrance ground to a complete halt for July, August, and September, awaiting the completion of the new roadways to once again connect the park.

For this particular study, ITRR was interested to understand the level of visitation to YNP by residents for 2022, but also whether they were deterred from visiting because of the flooding events in the park. ITRR also asked residents what their preferred entrance would’ve been for entering the park and in what month they were not able to use their preferred entrance. Results for these data can be found on the following pages, and by visiting our interactive dashboard here.

Overall, 16% of respondents stated they visited Yellowstone National Park (YNP) through a Montana entrance in 2022. The Yellowstone Country travel region reported the highest percentage of respondents who visited the park in 2022 at 46%, followed by those in Southeast Montana at 18%. Missouri River Country reported the lowest percentage of visitation to YNP at 4%, followed by 7% of respondents from Glacier Country.

Other Findings:

- Of those respondents who visited YNP in 2022, 20% also visited Glacier National Park that same year.
- Men and women were nearly equally as likely to say they visited YNP in 2022 (18% vs. 15%, respectively).
- Respondent age and length of residency in their current community had little impact on whether or not a respondent was more likely to visit YNP in 2022.
Flooding events in YNP began on June 13th, 2022, significantly altering visitation to the park in the following months - particularly for the North (Gardiner, MT) and Northeast Entrances of the park (Cooke City/Silver Gate, MT).

Key Findings:

- The month with the highest percentage of resident visitation to Yellowstone National Park took place in May, with roughly 2.5% of all respondents reporting visitation during that time. This was followed closely by September, with 2.28% of respondents visiting the park.
- Close to 12% of respondents from Yellowstone Country visited the park in the month of May - the highest for any month and any travel region.
- YNP recorded 3,290,242 recreation visits for the 2022 season, a 32% decrease from a record high season in 2021 and an 18% decrease from 2019. May of 2022 was the busiest May on record for YNP, recording 523,680 visits for the month.
2022 PREFERRED ENTRANCE - YELLOWSTONE NATIONAL PARK

An additional reason for conducting this survey was to better understand if residents were deterred from visiting the park as a result of flooding events in the region, and if so, what entrances were they deterred from using. Of those respondents who did not visit YNP in 2022, 13% indicated they did not visit the park because of flooding in the area. When asked what would have been their preferred entrance, 73% of respondents reported Gardiner, MT would’ve been their preferred entrance into the park. Another 16% of respondents reported they would’ve preferred to use the Silver Gate/Cooke City, MT entrance, followed by 12% who would’ve preferred to use the entrance in West Yellowstone, MT.

Respondents were also asked in what month were they not able to use their preferred entrance to YNP. Unsurprisingly, June was the month where the largest percentage of respondents were unable to use their preferred entrance, at 21%. This was followed closely by July (19%), August (17%), and September (16%). By October, just 3% of respondents reported they were unable to use their preferred entrance. On October 29th, 2022, YNP opened the newly-repaired Old Gardiner Road reconnecting Gardiner, MT to Mammoth Hot Springs. The Old Gardiner Road will continue to serve as the main road for visitors entering the park through the North Entrance until further notice.

PERCENTAGE OF VISITORS WHO WERE NOT ABLE TO USE THEIR PREFERRED ENTRANCE TO YNP - 2022
For Glacier National Park (GNP), recent years of increased visitation have prompted the park to implement a ticketed-entry reservation system designed to help mitigate some of the crowding issues the park currently faces. Such efforts have been instituted by the National Park Service in other popular parks around the country, such as Rocky Mountain and Arches national parks. For 2022, The Going-to-the-Sun Road Corridor and the North Fork/Polebridge area required a reservation to gain access from May 27th to September 11th. Portions of these tickets were made available four months in advance, with additional 24-hour reservations becoming available daily at 8am MDT the day before a planned visit.

For the 2023 season, GNP has expanded their reservation system to include the Many Glacier and Two Medicine regions for portions of the summer, creating a system in which the majority of popular destinations in the park require a reservation to visit during certain hours.* For this particular study, ITRR wanted to gain a better understanding of how many residents visited GNP is 2022, as well as how many residents attempted to use the ticketed-entry system (either successfully or unsuccessfully).
Overall, 19% of respondents stated they visited Glacier National Park (GNP) at some point in 2022. The Central Montana travel region reported the highest percentage of respondents who visited the park in 2022 at 39%, followed by those in Glacier Country at 28%. Missouri River Country and Southeast Montana reported the lowest percentage of visitation to GNP at 4% each, respectively, followed by 7% of respondents from Yellowstone Country.

Other Findings:

- Of those respondents who visited GNP in 2022, 18% also visited Yellowstone National Park that same year.
- Men and women were nearly equally as likely to say they visited YNP in 2022 (18% vs. 19%, respectively).
- Respondent age and length of residency in their current community had little impact on whether or not a respondent was more likely to visit GNP in 2022.
Month with the highest percentage of resident visitation to Glacier National Park took place in June, with roughly 9% of all respondents reporting visitation during that time. This was followed closely by July, with 8.23% of respondents visiting GNP.

Close to 22% of respondents from Central Montana visited GNP in the month of June - the highest for any month and any travel region.

GNP recorded 2,908,458 recreation visits for the 2022 season, a 6% decrease from 2021 (2nd highest visitation on record) and 5% decrease from 2019 (last year with full data and no area closures). In addition, September of 2022 was the busiest September on record for GNP, recording 544,575 visits for the month.
With the recent expansion of the ticketed-entry reservation system in GNP, ITRR was curious to know how many residents attempted to use the system in 2022, and how many were successful in the process. Overall, 9% of all respondents attempted to use the ticketed-entry system for GNP in 2022. Of those respondents, 81% were successful in securing a reservation online. In addition, respondent age also appears to play a role in the rate of success for reservations, as those 18-29 had a 90% success rate, compared to 74% for those 50-59 years old, and 61% for those 70 years and up.

For respondents who did not visit GNP in 2022, they were asked if challenges with the ticketed entry system were the reason they did not visit the park. Overall, 12% of respondents stated they did not visit GNP in 2022 because of challenges with the ticketed entry reservation system. Over one in four respondents (27%) from Glacier Country indicated they did not visit the park in 2022 because of the ticketed entry system, the highest for any travel region. All residents were given the chance to share any thoughts they had concerning the survey topic. Roughly 7% (n=467) of respondents provided some comment, of which nearly half (47%, n=221) expressed some dislike or frustration regarding the ticketed-entry reservation system in Glacier National Park.
Overall, residents were fairly active in visiting both Glacier National Park and Yellowstone National Park for the 2022 season. In a year that featured several changes and challenges to how residents visit their local national parks, roughly one in six respondents (16%) reported visiting Yellowstone National Park, and nearly one in five respondents (19%) reporting visiting Glacier National Park.

Although flooding events dramatically shaped the visitation trends for Yellowstone National Park in 2022, just 13% of respondents who did not visit the park stated it was because of the flooding events that took place in early June. Furthermore, by October of 2022, less than 3% of respondents indicated that they could not use their preferred entrance when visiting Yellowstone National Park. Unsurprisingly, the majority of respondents (73%) also indicated that if they were to have visited the park, the North Entrance in Gardiner, MT would’ve been their preferred entrance for entering the park.

As for visitation to Glacier National Park, less than 10% of respondents (8.8%) stated they attempted to use the ticketed entry system in 2022. Of those respondents, the overwhelming majority (81%) were successful in securing their reservation, while the remaining 19% were not. Of those respondents who stated they did not visit Glacier National Park in 2022, the majority (88%) indicated that it was not due to challenges with the ticketed-entry reservation system. However, 27% of respondents from the Glacier Country Travel Region (where Glacier National Park is located), expressed they did not visit the park in 2022 because of challenges with the reservation system. In addition, some residents also expressed frustration over the fact they were required to gain a ticket for entry to Glacier National Park.

For more information on the topic, or the opportunity to segment data in interesting ways that can be more useful to you or your organization, visit our website at irr.umt.edu or view our interactive dashboard here.