

TOURISM IN THE GREATER YELLOWSTONE ECOSYSTEM: WILDLIFE WATCHING'S GROWING IMPORTANCE

The Greater Yellowstone Ecosystem (GYE) has a thriving economy built on many industries including outdoor recreation. The following information summarizes estimates of valuation of wildlife viewing recreation in the region and the impact of these activities in the GYE.

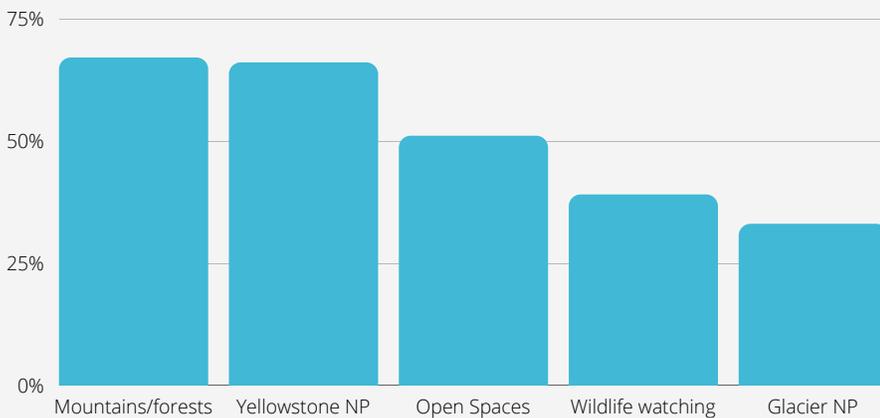
PARK COUNTY'S TOURISM ECONOMY

- **Over \$236 million** is spent in Park County by out-of-state travelers. Visitor spending creates **3,270 jobs** and contributes to local and state taxes.
- In Park County, MT, a larger share of jobs are dependent on the service industry than the rest of the state such as accommodations or retail, indicating non-resident spending's importance to the region.

Source: 2019 ITRR Non-resident Visitor Study: <https://itrr.umt.edu/>

Metrics	Montana	Park County, MT
Total Visitor Spending	\$3,760,880,000	\$236,892,000
Employment	53,120	3,270

WHY DO PEOPLE VISIT THE GYE AND YELLOWSTONE COUNTRY?

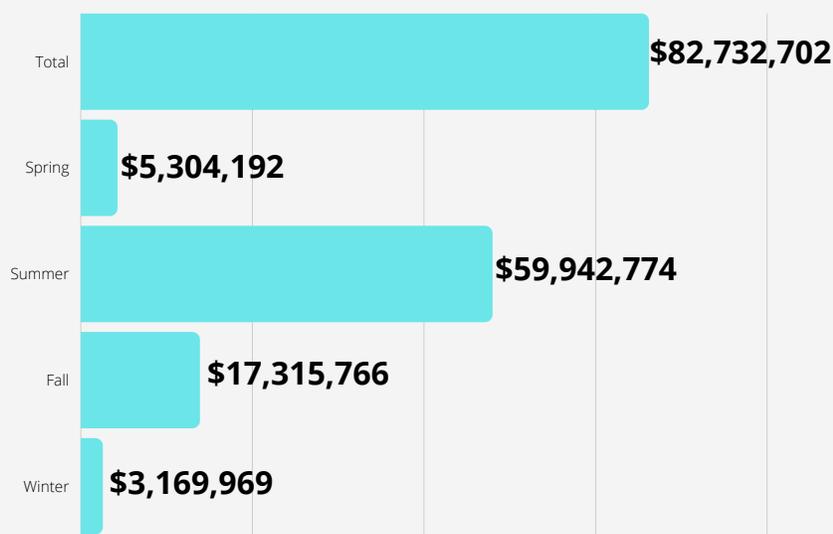


Source: 2021 ITRR Non-resident Visitor Study: <https://itrr.umt.edu/> (5-year averages)

- Montana vacationers staying a night in Yellowstone Country highlighted five key reasons for visiting the state, destinations and natural features being four of the top five and **wildlife watching (39%) as the only activity to make the top five.**

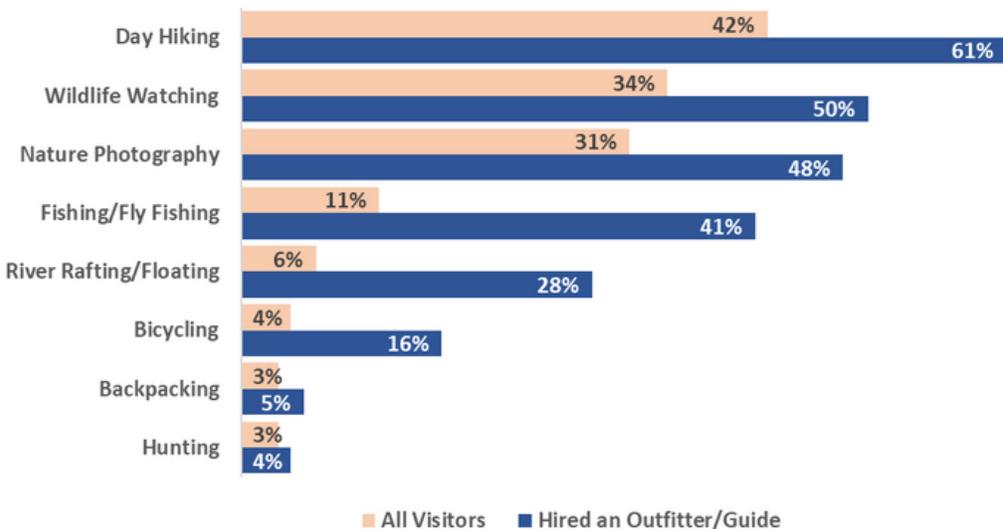
WHAT DOES WILDLIFE WATCHING DO FOR THE ECONOMY?

- In 2005, total economic impact of wolf-related visitation to Yellowstone was estimated to be \$35 million. To this day, the study represents the most defensible estimate of economic impact related to wolf-related visitation to the region.
- In 2022, the study was updated using known data to help understand the new impact. Today, visitation due to wolves specifically contributes **at least \$82 million in the GYE. This estimate is conservative as it doesn't assume any growth in percent of people interested in wolf watching, which has been anecdotally documented as a fast growing activity.**



Source: Duffield, Neher, and Patterson. 2005. Wolf Recovery in Yellowstone: Park Visitor Attitudes, Expenditures, and Economic Impacts. *The George Wright Forum*. 25:1. 13-19.

WHICH ACTIVITIES DO MONTANA VISITORS PARTICIPATE IN?

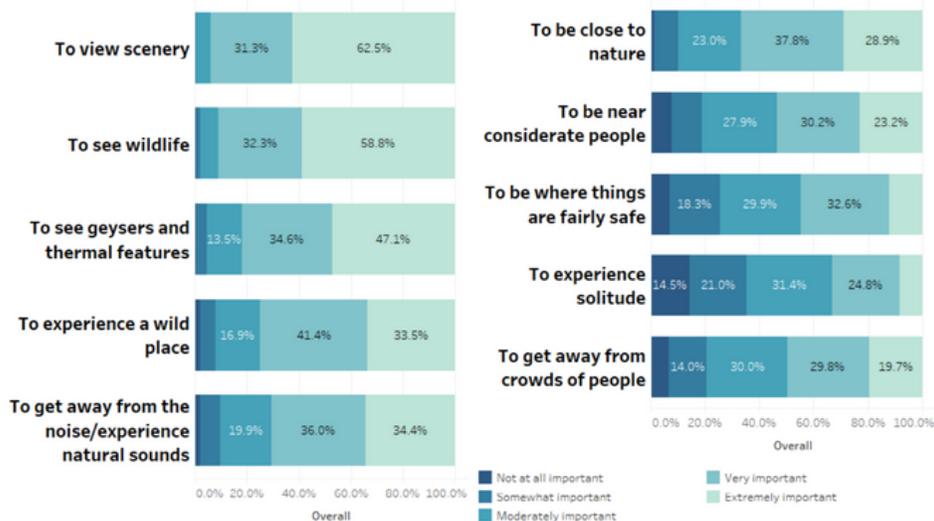


- Montana visitors generally participate in day hiking (42%), wildlife watching (34%), and Nature Photography (31%).
- If the visitor hired an outfitter or guide on some part of their trip, **visitors participated even more in the core activities** such as hiking (61%), wildlife watching (50%), and even fishing (41%). **Activities like backpacking and hunting saw little change in participation, even if a guide was hired as part of their trip to Montana.**
- Note: These figures don't represent the activity their guide was hired for but rather the participation rates of activities if they hired an outfitter/guide on any part of their trip.

Source: 2017-2021 ITRR Non-resident Visitor Study. <https://itrr.umt.edu/> (5-year averages)

2018 AND 2016 YELLOWSTONE VISITOR STUDIES

Yellowstone National Park has conducted two large visitor research studies in the past six years (2016 and 2018). Common to both these studies was an effort to identify the primary reasons why people visit the park and local area. These studies provide additional evidence on wildlife watching's growth in the reason why people come to the area.



- Researchers found in 2016 and 2018 among Yellowstone's visitors. **"To see wildlife" was the 2nd highest rated reason to visit next to "to view scenery"**.
- Yellowstone's visitors at all entrances rank very high on wanting to see wildlife on their trip to the park.

Sources: RSG. 2016. *Yellowstone National Park Visitor Use Study: Summer, 2016*. National Park Service and RRC Associates, ITRR, and Otak, Inc. 2018. *2018 Yellowstone National Park Visitor Use Study*. National Park Service.

WHAT'S ALL THE DATA MEAN?



- The GYE, including places such as Park County, MT have seen a pivot in terms of what their visitors are looking for over the past 20 years. **Wildlife watching has become a large, important activity in the region** and a top reason for people coming to the area.
- Using this information, **protecting wildlife viewing opportunities should be at the forefront of the region's outdoor recreation portfolio.**