

A winter landscape featuring snow-covered evergreen trees in the foreground and middle ground. In the background, there are snow-capped mountains under a blue sky with light, wispy clouds. The sun is visible on the left side, creating a bright glow and casting long shadows.

Tourism and Recreation Directions and Challenges

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What is the Economic contribution of the tourism Industry in MT?

- \$2.3 billion contribution to the state
- over 25,000 jobs
- over \$661 million in personal income
- \$153 million in state/local taxes
- It is one of the top contributors of basic industry labor income to this state



What have we used to measure tourism along with the economics?

- 2010 nonresident visitation **up** 4%
- Montana air travel **up** 2%
- Glacier Park **up** 8.9%; Yellowstone **up** 8.3%
- Rooms sold in Montana **up** 5.6%
- Skier visits **up** 2.3%



How should we measure tourism?

Maybe through....

Geotourism - tourism that sustains or enhances the geographical character of a place including the environment, heritage, aesthetics, culture, and well being of its residents. It is about working landscapes like MT ranches, communities, and protected areas.



<http://travel.nationalgeographic.com/travel/sustainable/index.html>

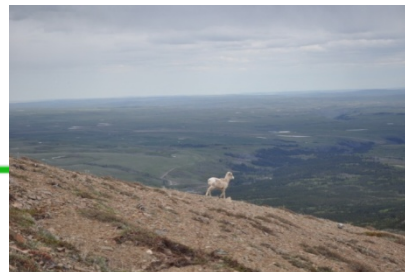
Geotourism measures would include

- Clean waterways and air
- Wildlife viewing opportunities
- Amount of open space
- Unimpaired night skies
- Amount of access to public lands and waterways
- Pedestrian-friendly atmosphere
- Main streets with local culture/heritage reflected
- Walking and biking paths

WHY would we do that?

.....because visitors want to be here to experience why we live here. The two are one and the same!

How do we do that?

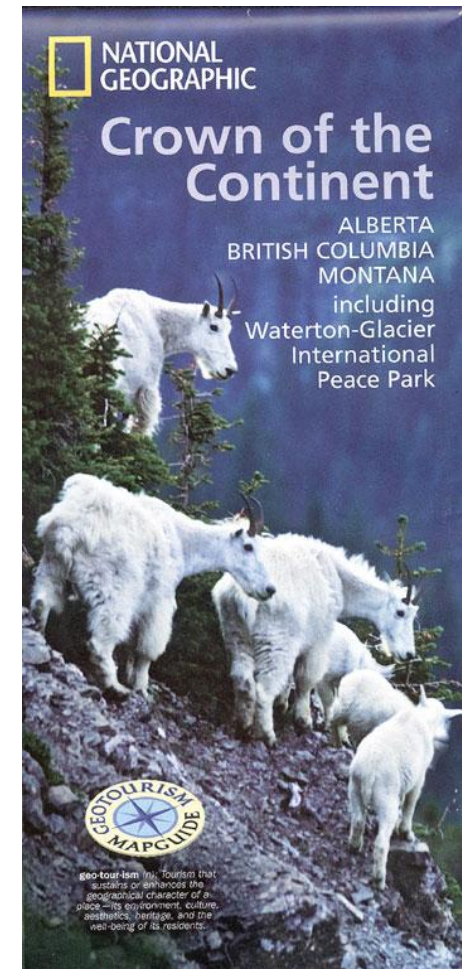
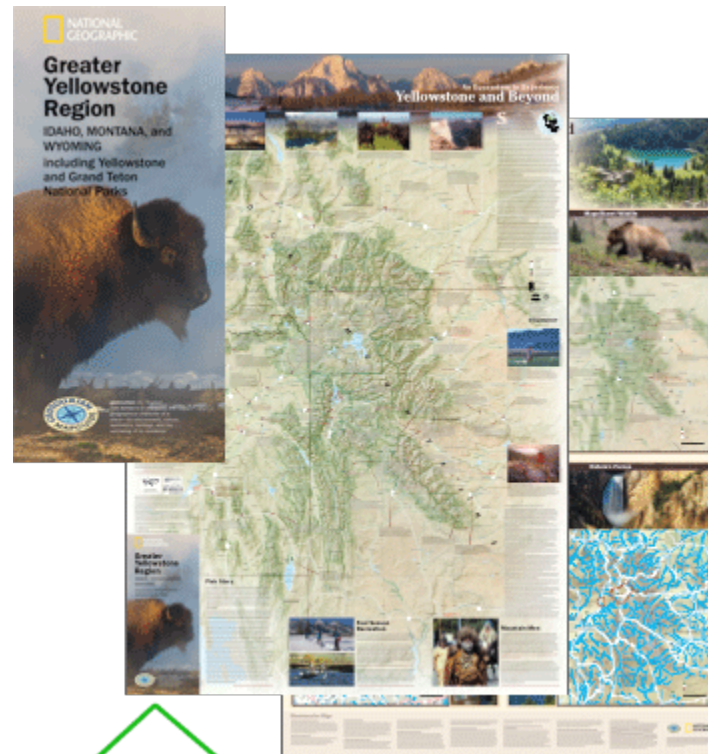
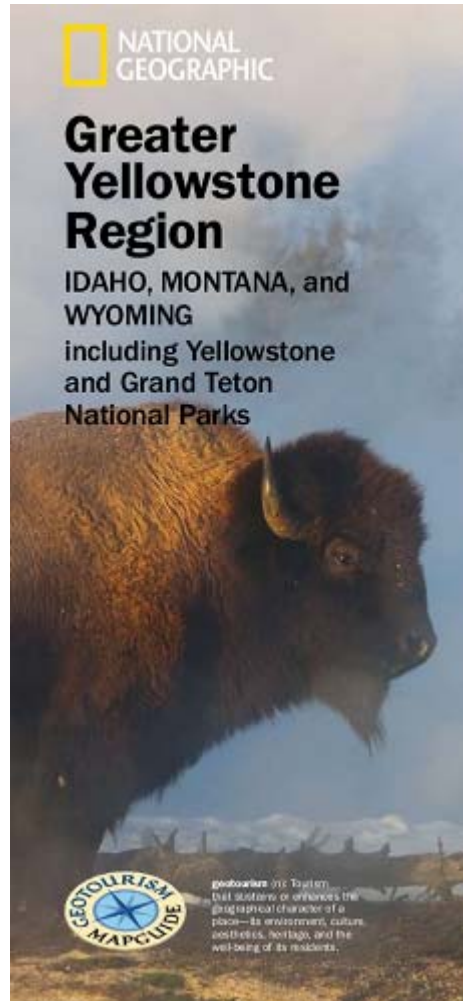


Institute
for
Tourism and
Recreation
Research

National Geographic Mapguides

www.crownofthecontinent.net

www.yellowstonegeotourism.org



Montana Tourism Charter: Created and Adopted in 2007

- Maintain integrity of place and destination appeal.
- Highlight what is unique to Montana.
- Promote conservation of energy, water and wildlife.
- Help community stewardship partnerships to maintain MT assets.
- Draw visitors who help sustain Montana's distinct character.
- Foster a diversity of products and services for "geotourists."
- Ensure visitor satisfaction and an enduring market demand through education of Montana residents about the benefits of sustainable tourism.

Goal: To have 50 counties and 75 cities adopt the Charter by 2012.

Who has adopted the Tourism Charter so far?

- Montana Tourism Advisory Council
- Montana Commerce Department
- Montana Office of Tourism
- Glacier Country Regional Tourism Commission
- Yellowstone Country Inc.
- Big Sky Chamber/CVB
- City of Whitefish
- Whitefish Convention and Visitor Bureau
- Northern Rockies Region of the National Parks Conservation Association
- Montana Arts Council
- Miles City Chamber of Commerce and CVB
- City of Miles City
- Whitefish County Water District
- Montana Heritage Commission
- Helena Convention & Visitors Bureau
- Helena Hospitality Group
- Travel Industry Association of Montana
- Flathead Basin Commission
- Beaverhead Chamber of Commerce
- Montana Preservation Alliance
- Butte Silver Bow Convention and Visitors Bureau
- Montana Innkeepers Association

Top Attributes as Indicated by

Nonresidents

While traveling in Montana, how important are the following 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
Local cultural and heritage main streets	4.7
Paths for walking & biking	4.7

Scale: 1= not at all important; 6= very important

N = 284 nonresident vacationers

Satisfaction of Montana

Attributes

1= very dissatisfied  6= very satisfied	Mean
Amount of open space	5.67
Scenic driving opportunities	5.64
The “character” of Montana	5.57
Condition of the natural environment	5.51
Wildlife viewing opportunities	5.44
Stewardship of the land	5.38
A feeling of authenticity	5.37
Main streets reflecting local culture	5.24
Access to public lands	5.22

Least satisfied with: Availability of recycling bins, rest areas, road conditions, environmental practices of accommodations.

Survey: How high a priority is it that the MT Tourism Industry.....

	<u>Industry Response</u>	<u>Resident Response</u>
Help maintain MT's destination appeal	1	6
Maintain the character of Montana	2	2
Encourage all types of tourism devlp.	3	7
Strive to hire local people	4	1
Promote preservation of open space	5	3
Help prevent overdevelopment if against community values	6	4
Strive to reduce energy consumption	7	5

* Rankings based on highest to lowest mean by each group

What does this mean?

- Tourism is a \$2 billion industry made up mostly of Montana entrepreneurs who are also citizens of this state.
- Citizens and visitors desire the same attributes for their quality of life or their quality of visit.
- It only makes sense to strive for authentic places that bring geotravelers who support Montana's culture, aesthetic desires, environmental concerns, and way of life.



The Geotourism Handbook: A Reference and Guide for Montana Businesses

http://www.itrr.umt.edu/research10/GeotourismHandbook2010_6.pdf



Back to the old measurement...

Montana Expectations for 2011

- Nonresident visitation +2%
- Rooms sold +1.5%
- Yellowstone +3.3%; Glacier +0.3%
- Skier visits +2%
- Airline deboardings +1%
- MT tourism business owners: 55% expect increase



Thank You

www.itrr.umt.edu

MT Tourism Charter

<http://travelmontana.mt.gov/charter/MTTourismRecreationCharter09.pdf>

The Next Five Trend Graphs Slides are.....

Nonresident visitation

Glacier and Yellowstone National Park Visits

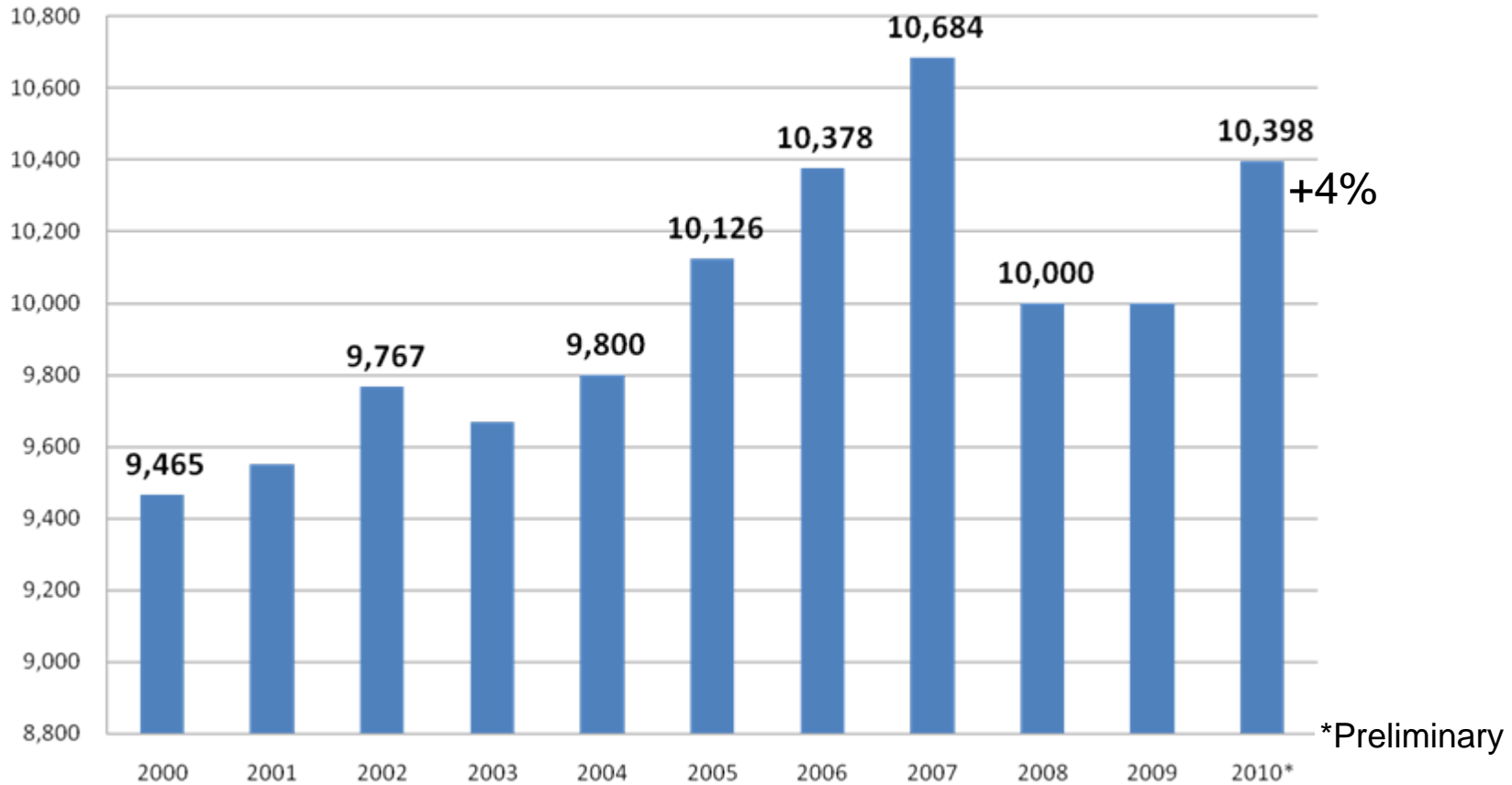
Airline Deboarding by City

Montana Ski Area Visits

Tourism Business Owners Expectations



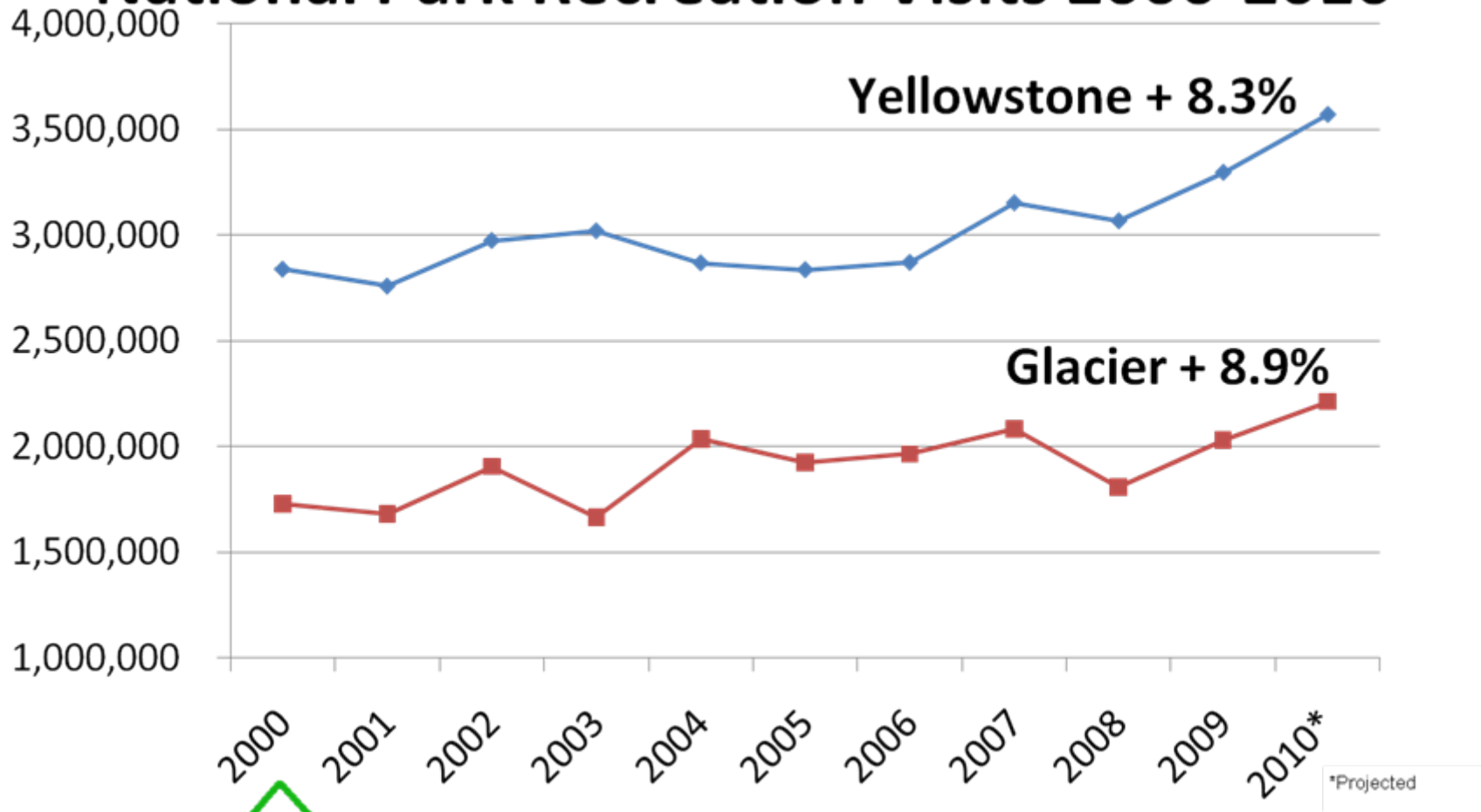
Montana Nonresident Visitor Trends 2000-2010



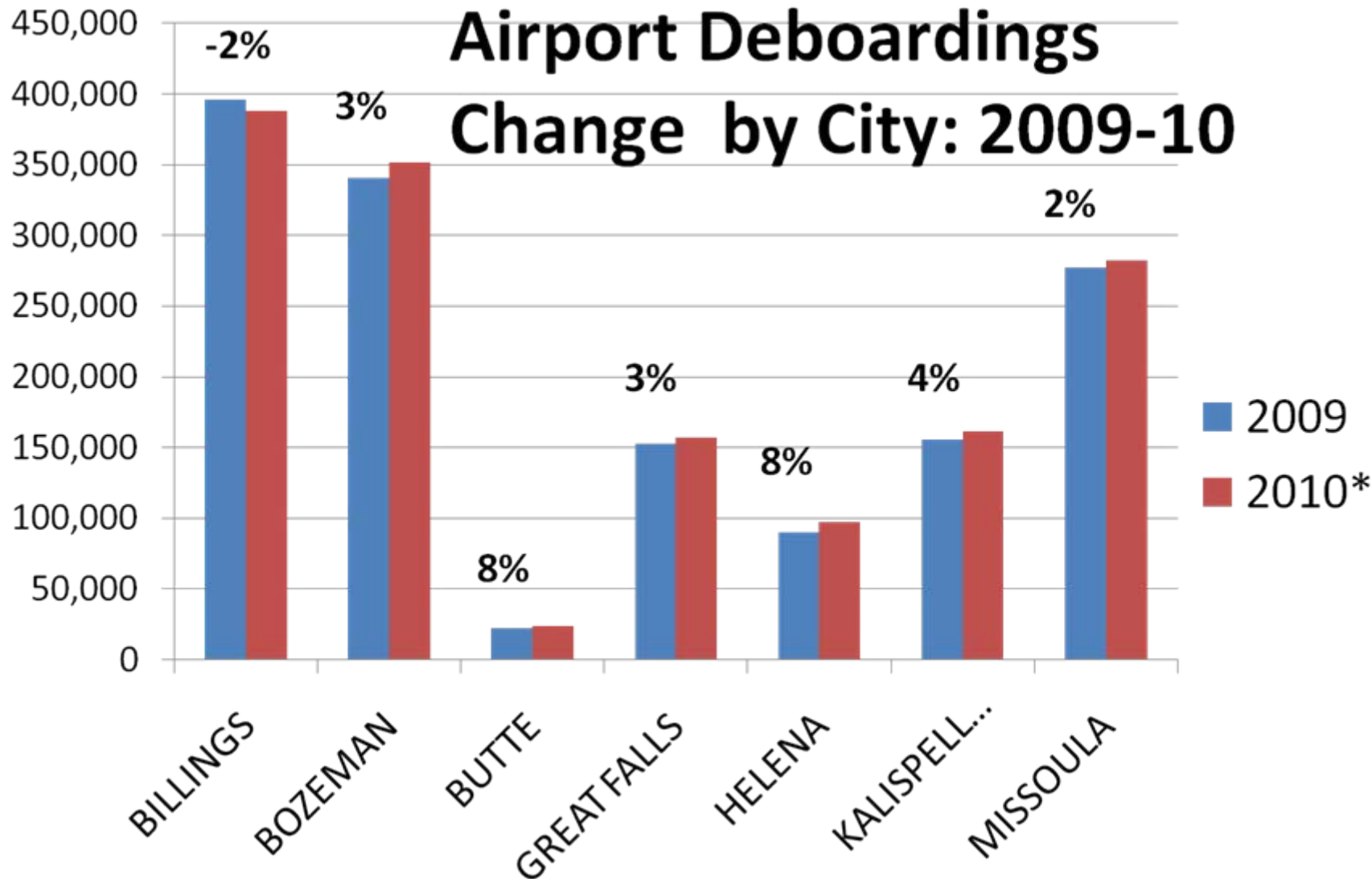
Source: ITRR



National Park Recreation Visits 2000-2010

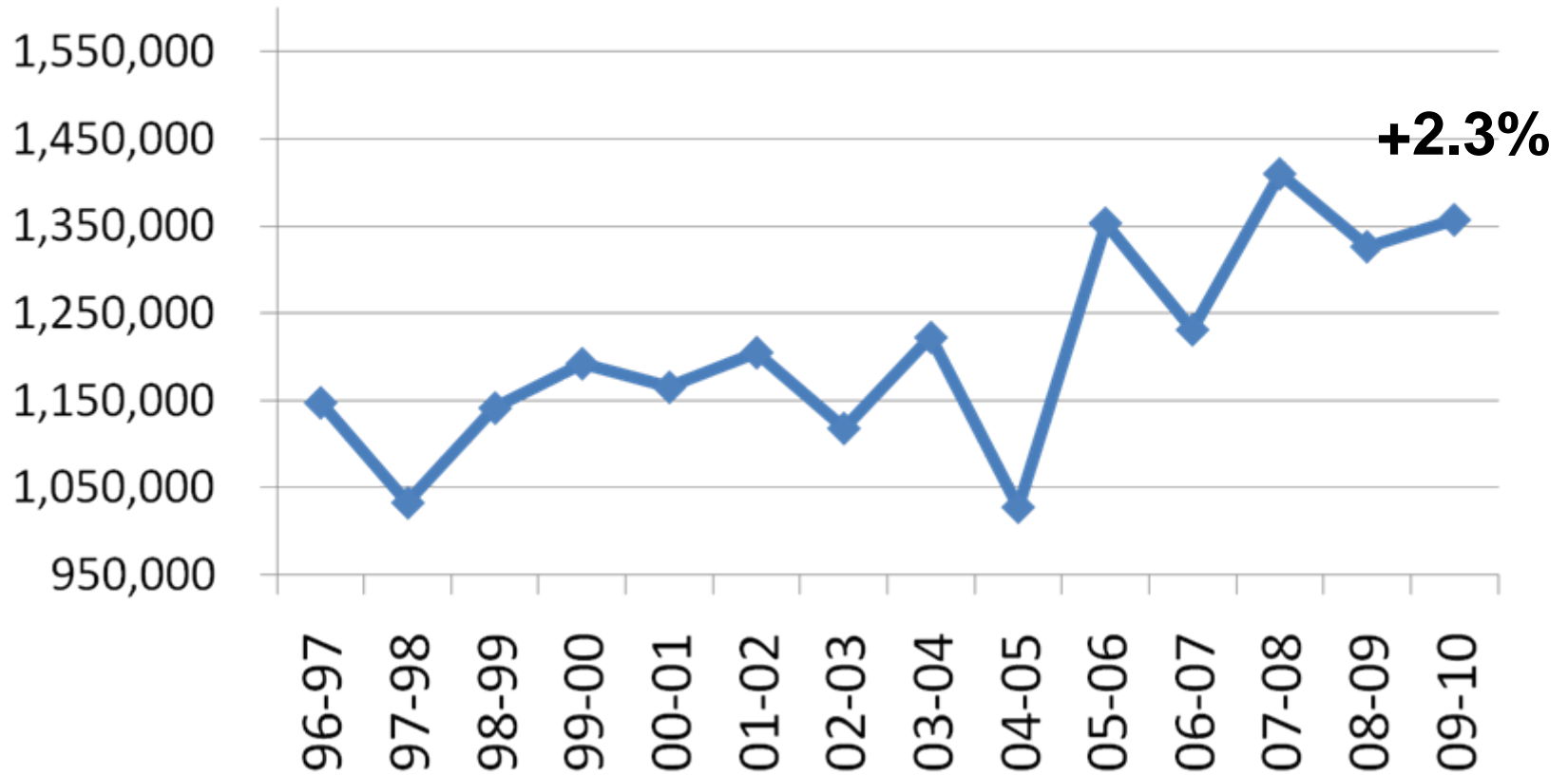


Airport Deboardings Change by City: 2009-10



Source: Montana Aeronautics Division

Montana Ski Area Visits 1996-2010



Tourism Business Owners: % Who Expect an Increase

