



**Report on Recreation User Values
For Funding Agriculture, Recreation & Conservation
Along the Yellowstone Gateway Corridor
in Park County, Montana**

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EXECUTIVE SUMMARY

Outdoor recreation and tourism contribute significantly to the economy of Park County, Montana. Many angler guides, agriculture producers and resident recreation users have come to agree that the significant growth of outdoor recreation and tourism is both a benefit and a burden to local natural resources and county transportation infrastructure. Beginning in 2017, stakeholders started discussing creative means to fund Park County conservation and infrastructure. One proposed solution is an amendment to the resort tax that permits locals to create a resort tax region along the Upper Yellowstone River corridor and allocates funds from the resort tax to local infrastructure and conservation needs. The Greater Yellowstone Coalition has been at the forefront of this conversation. Through dialogue with leaders in the agriculture and outdoor recreation sectors, the Greater Yellowstone Coalition concluded that it is important to better understand values of recreation users for funding conservation and protecting regional resources.

In the summer of 2018, the Greater Yellowstone Coalition interviewed 1,199 residents and non-residents at Fishing Access Sites along the Yellowstone River from Livingston to the northern Gardiner Basin in Park County, Montana. The survey explored three main topics: 1) how recreation users would prefer to invest funds generated from a potential regional resort tax if implemented in the future along the Yellowstone Gateway corridor; 2) support for congressional legislation to protect the Yellowstone River and its headwaters through implementation of a permanent mineral withdrawal on public lands and the Wild & Scenic Rivers Act; and 3) preferred types of recreation and their frequency.

Among a suite of thirteen natural resource, agriculture and county infrastructure topics, resident and non-resident recreation users were most supportive of funding projects to: 1) protect water quality of streams and rivers (98% described as extremely/very Important); 2) conserve fish and wildlife habitat (96% described as extremely/very Important); and 3) protect open space (92% described as extremely/very Important). Maintaining quality of life was also perceived as being exceptionally important. Ninety-four percent (94%) of those surveyed ranked quality of life as extremely important or very important. Funding applications for quality of life, however, are admittedly more subjective and less tangible. Ultimately, all thirteen topics received considerable support for funding. For example, using resort tax dollars to fund the maintenance and upgrade of county roads ranked thirteenth out of thirteen topics but still received 65% support from people who described it as extremely or very Important.

In terms of policy, eighty-six percent (86%) of recreators support designating the upper Yellowstone River from Gardiner to Carbella Fishing Access Site as a National Wild & Scenic River; twelve percent (12%) were undecided, one percent (1%) opposed, and one percent (1%) did not answer. Eighty-one percent (81%) of recreators support the Yellowstone Gateway Protection Act, which would permanently withdraw mineral development on public lands around Emigrant Peak and Crevice Mountain. Twelve percent (12%) were undecided on this issue, three percent (3%) opposed, and two percent (2%) did not answer.

Paddling (rafting, kayaking, canoeing) and fishing were the most common forms of recreation in Park County. Seventy-six percent (76%) of people surveyed paddle and seventy-four percent (74%) fish. Thirty-four percent (34%) of respondents to the survey said they either paddle or fish very often (greater than 20 times per year) or often (ten to twenty times per year). Camping (72% participation) and hiking (67% participation) also ranked high as common forms of recreation in Park County.

INTRODUCTION

The Greater Yellowstone Coalition's Survey on Recreation User Values for Funding Agriculture, Recreation & Conservation Interests Along the Yellowstone Gateway Corridor in Park County, Montana examined the appetite of 1,199 residents and non-resident recreation users to support and fund needed infrastructure and conservation measures to protect open space, ecological function, and river health through innovative mechanisms such as a regional resort tax. Two Greater Yellowstone Coalition interns used deep canvassing techniques with support from the Montana Engagement Project (MEP) to gather both quantitative and qualitative data at Montana Fish Wildlife & Parks and US Forest Service fishing access sites during an eight-week period in July and August of 2018 at the height of the river recreation season on the upper Yellowstone River in Park County, Montana.

PURPOSE

The primary purpose of the survey was to understand how recreation users would prefer to invest funds generated from a potential regional resort tax if implemented in the future along the upper Yellowstone River corridor. As of 2018 there are ten established resort tax districts across the state of Montana. The upper Yellowstone gateway corridor does not currently qualify as a resort tax region based on population size but there is an active effort by the Park County Commission, City of Livingston, businesses within the region, and non-governmental organizations to amend the Montana Code to permit this opportunity to occur. The Greater Yellowstone Coalition is interested to see if the public, particularly Park County residents, would support conservation funding to be generated as part of a regional resort tax, and, how recreation users might value investments in conservation, such as open space easements and purchasing valuable land for fish and wildlife habitat, compared to investments in county roads and infrastructure.

Surveyors also asked recreation users about their political support for permanent mineral withdrawal on Emigrant Peak and Crevice Mountain, which is currently proposed as legislation in the U.S. Congress as the Yellowstone Gateway Protection Act, as well as support for Wild & Scenic River protections for the upper stretch of the Yellowstone River between Gardiner and the Carbella Fishing Access Site. Recreators were also asked about their preferred types of recreation in Park County.

BACKGROUND

In August 2016, an unprecedented fish-kill on the Yellowstone River led to a five-week closure to all forms of recreation on a 183-mile river section from Gardiner to Laurel, Montana. The incident served as a catalyst for people from agriculture, recreation, tourism and conservation interests to come together to discuss the future health of the river, its tributaries, and the agricultural and recreation economies dependent on sustainable natural resources. One consistent theme that emerged through conversations is the need for funding to support shared interests such as: the protection of open space and working landscapes; for measuring water quality; for managing noxious weeds; for maintaining and enhancing county road and fishing access site infrastructure; and, for protecting ecological services provided by instream flow and invaluable aquatic, riparian and terrestrial habitat on private lands.

In response to this need, for over a year the Greater Yellowstone Coalition has been exploring the opportunity to use creative funding mechanisms such as a hybrid resort tax model to fund interests related to agriculture, recreation and conservation. The Survey on Recreation User Values in Park County, Montana, was purposefully designed to investigate the appetite of residents and non-resident travelers to fund services related to infrastructure enhancement, natural resource conservation, and noxious weeds management along the upper Yellowstone River corridor.

The Greater Yellowstone Coalition fully recognizes the need and benefits of strong local and visitor support for river conservation. GYC has a successful legacy of working within communities to restore local streams, enhance native trout populations, and protect free-flowing rivers under the Wild & Scenic Rivers Act (WSRA). GYC is currently engaged in two Park County, Montana campaigns involving permanent mineral withdrawal on Emigrant Peak and Crevice Mountain to protect public lands and waters, and to protect the upper Yellowstone River's remarkable wildlife and recreation values through a Wild & Scenic Rivers Act designation between Gardiner and the Carbella Fishing Access Site. GYC's past successes in Wild & Scenic Rivers Act designations have included the Clarks Fork of the Yellowstone River near Cody, Wyoming in 1991, the Snake Headwaters near Jackson, Wyoming in 2009, and East Rosebud Creek on Montana's Beartooth Front in 2018. The Greater Yellowstone Coalition is well positioned to work with existing business partners from ongoing campaigns and add broader conservation outcomes in Park County with the support of qualitative and quantitative data that demonstrates resident and non-resident preferences for funding natural resource conservation, agriculture and recreation infrastructure interests.

SURVEY METHODOLOGY

During an eight-week period, which corresponded with the peak river-recreation season in July and August of 2018, two seasonal employees from the Greater Yellowstone Coalition surveyed 1,199 river recreation users at ten Fishing Access Sites in Park County, Montana. The geographic area was confined between the incorporated city of Livingston and the northern Gardiner Basin to specifically cover the area where a prospect regional resort tax might be created. The Fishing Access Sites where surveys took place included: Mayor's Landing, Carter's Bridge, Pine Creek, Pine Creek Campground (Forest Service), Mallard's Rest, Grey Owl, Emigrant, Point of Rocks, Carbella (BLM), and Yankee Jim (Forest Service). Surveys were conducted in person and verbally. Surveyors approached recreators at Fishing Access Sites and asked them to voluntarily complete the survey. Each survey lasted between four and six minutes. Surveyors recorded results on a paper survey template in the field and then transcribed them into a digital data base back in an office. Residents and non-residents were chosen at random. Each surveyor spent about 25 hours per week at Fishing Access Sites, including at least one weekend day (Saturday or Sunday) per week.

Before beginning the eight-week survey, surveyors were trained with technical support on best practices and protocols on surveying the public from materials used by the Montana Engagement Project (MEP). The Greater Yellowstone Coalition trained seasonal staff on the details behind developing a regional resort tax that could support future agriculture, recreation and conservation funding in the region. This was done so that the surveyors could professionally explain the vision to recreators, but only under the circumstance that the public asked about the purpose of the survey.

The survey used both qualitative and quantitative questions to flesh out what river recreation users value about regional natural resources, recreation experiences and opportunities, open space on private agricultural lands, infrastructure access for recreation, and social support for new and creative funding mechanisms that preserve the agricultural and recreational economies while conserving natural resources. Questions specific to resident and non-resident support for conservation tools like mineral withdrawal and Wild & Scenic Rivers Act legislation were also performed during the surveying process as it relates to current and future management of public lands within the upper Yellowstone watershed. Finally, surveyors also asked demographic questions related to name, age, residence, political affiliation and sex.

These results have some inherent bias towards river recreation values due to the fact that the survey was conducted at Fishing Access Sites. Clearly, not all Park County residents participate in outdoor recreation or spend time at Fishing Access Sites. However, as described in the report referenced in Appendix D (*The Montana Expression 2018: MT Residents' Use of Fishing Access Sites & Public Lands and Waterways Values. Institute for Tourism and Recreation Research*) Park County and adjacent counties in Yellowstone Country sees the highest percent of Montana residents who use Fishing Access Sites – 64%. This data shows that a large proportion of Park County residents – over two-thirds – recreate in the places where surveyors chose to conduct the recreation user values survey. This gives the Greater Yellowstone Coalition confidence that the survey represents a broad cross-section of Park County residents and is statistically significant.

SURVEY RESULTS

I. PREFERRED FUNDING APPLICATIONS FROM A POTENTIAL REGIONAL RESORT TAX

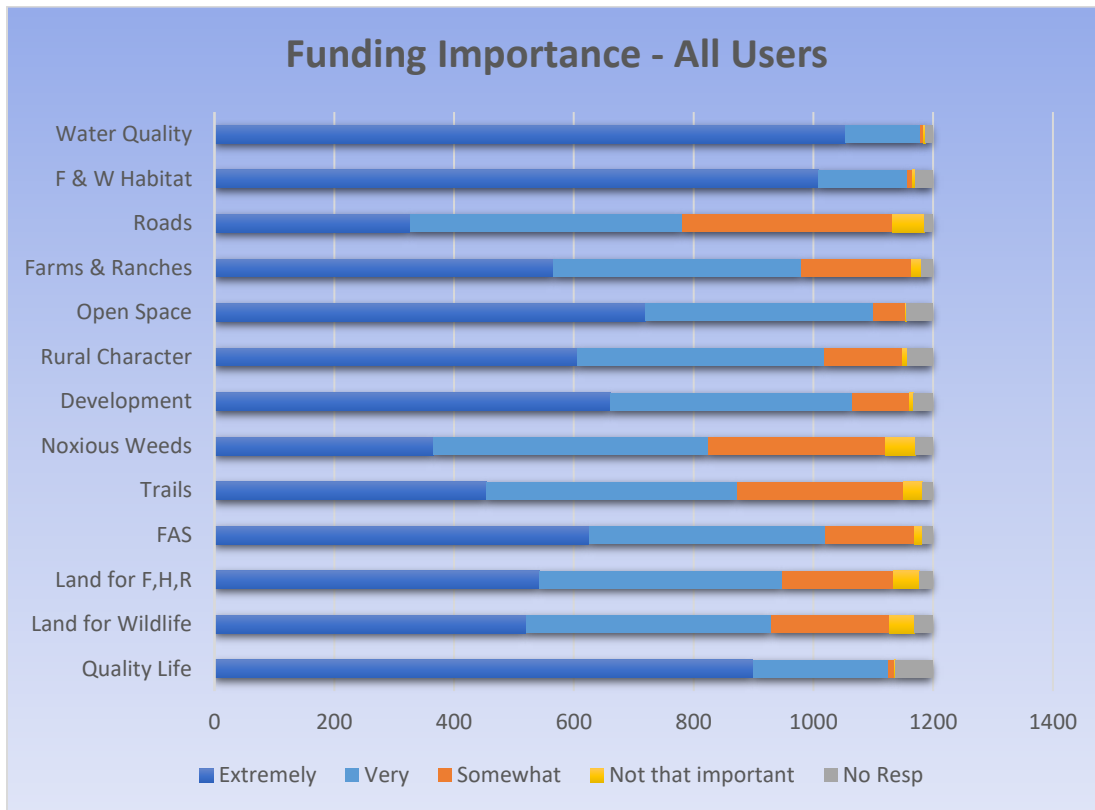
A significant section of the recreation user survey was developed to better understand where recreation users of the upper Yellowstone watershed in Park County, Montana would prefer to invest dollars generated from a potential regional resort tax. Surveyors asked recreation users the following question:

Next, I am going to read you some specific types of projects that are being considered as part of an agriculture, recreation and conservation fund in Park County. Some of which could be funded by a future resort region tax. For each one, please tell me how important it is to you that funds be included for that specific purpose. Use a scale of 1-4; 4 being extremely important, 3 being very important, 2 being somewhat important and 1 being not that important.

An Agriculture Recreation Conservation Fund could support.... (RANDOMIZE STATEMENTS)

- 4.1. Protecting water quality of streams and rivers*
- 4.2. Conserving fish and wildlife habitat*
- 4.3. Maintaining or upgrading county roads*
- 4.4. Conserving family farms, ranch lands and local food production*
- 4.5. Conserving open space and scenic views*
- 4.6. Protecting the rural character of our county*
- 4.7. Conserving lands that are threatened by development*
- 4.8. Managing noxious weeds*
- 4.9. Extending, connecting and maintaining trails for hiking, walking and biking*
- 4.10. Maintaining or enhancing fishing access sites and stream gauges*
- 4.11. Purchasing lands for fishing, hunting and recreation access*
- 4.12. Purchasing lands for wildlife habitat*
- 4.13. Maintaining our quality of life*

FIGURE 1A. COMPARISON OF RECREATION USER VALUES FOR FUNDING RESOURCES IN UPPER YELLOWSTONE GATEWAY CORRIDOR, PARK COUNTY, MONTANA



Importance	Water Quality	Habitat	Roads	Farms & Ranches	Open Space	Rural Character	Development	Noxious Weeds	Trails	FAS	Land for F,H,R	Land for wildlife	Quality Life
Extremely	1054	1008	326	566	719	606	661	366	454	625	542	520	899
Very	124	149	454	414	382	412	404	458	419	395	406	410	226
Somewhat	5	9	352	184	52	130	95	296	277	148	185	197	10
Not that important	4	3	53	15	2	9	7	50	32	13	44	41	2
No Resp	12	30	14	20	44	42	32	29	17	18	22	31	62

“Water Quality” refers to protecting water quality of streams and rivers. “F & W Habitat” refers to conserving fish & wildlife habitat. “Roads” refers to maintaining or upgrading county roads. “Farms & Ranchlands” refers to conserving family farms, ranch lands and local food production. “Open Space” refers to conserving open space and scenic views. “Rural Character” refers to protecting the rural character of our county. “Development” refers to conserving lands that are threatened by development. “Noxious Weeds” refers to managing noxious weeds. “Trails” refers to extending, connecting and maintaining trails for hiking, walking and biking. “FAS” refers to maintaining or enhancing Fishing Access Sites and stream gauges. “Land for F, H, R” refers to purchasing lands for fishing, hunting and recreation access. “Land for wildlife” refers to purchasing land for wildlife habitat. “Quality of Life” refers to maintaining our quality of life.

Overall, Figure 1A above indicates all potential funding applications ranked high, particularly when examining topics that recreation users said were either extremely important or very important to fund along the upper Yellowstone gateway corridor. High levels of support (extremely or very important) for each funding application varied between 98% for protecting water quality of streams to 65% for funding maintenance and upgrade of county roads. Eleven of thirteen funding categories received 73% support

or higher with people saying investing in these resources is extremely or very important. Only two categories – road maintenance and noxious weeds funding – received less than 70% of the public’s support for being extremely or very important to fund. But even these two categories ranked relatively high with roughly two-thirds of recreation users viewing road maintenance (65%) and noxious weeds (69%) as extremely or very important to fund.

We realize there is an inherent bias in asking recreation users their preferences for funding resources in the upper Yellowstone gateway corridor through a potential resort tax, in that recreation users might be more likely to prioritize funding for recreation outcomes. If this was the case we would expect recreation users to first prioritize funding for Fishing Access Sites, purchasing of land for fishing, hunting and other recreation, building or maintaining more trails, and logically, upgrading roads to access recreation opportunities. However, this was not the result. Instead, recreation users were most enthusiastic about funding projects that support water quality of streams and rivers, conserving fish and wildlife habitat (potentially using conservation easements), protecting open space (again, potentially using conservation easements), and defending the rural landscape, ecological integrity and scenery from more development.

FIGURE 1B. RESIDENTS ONLY - COMPARISON OF RECREATION USER VALUES FOR FUNDING RESOURCES IN UPPER YELLOWSTONE GATEWAY CORRIDOR, PARK COUNTY, MONTANA

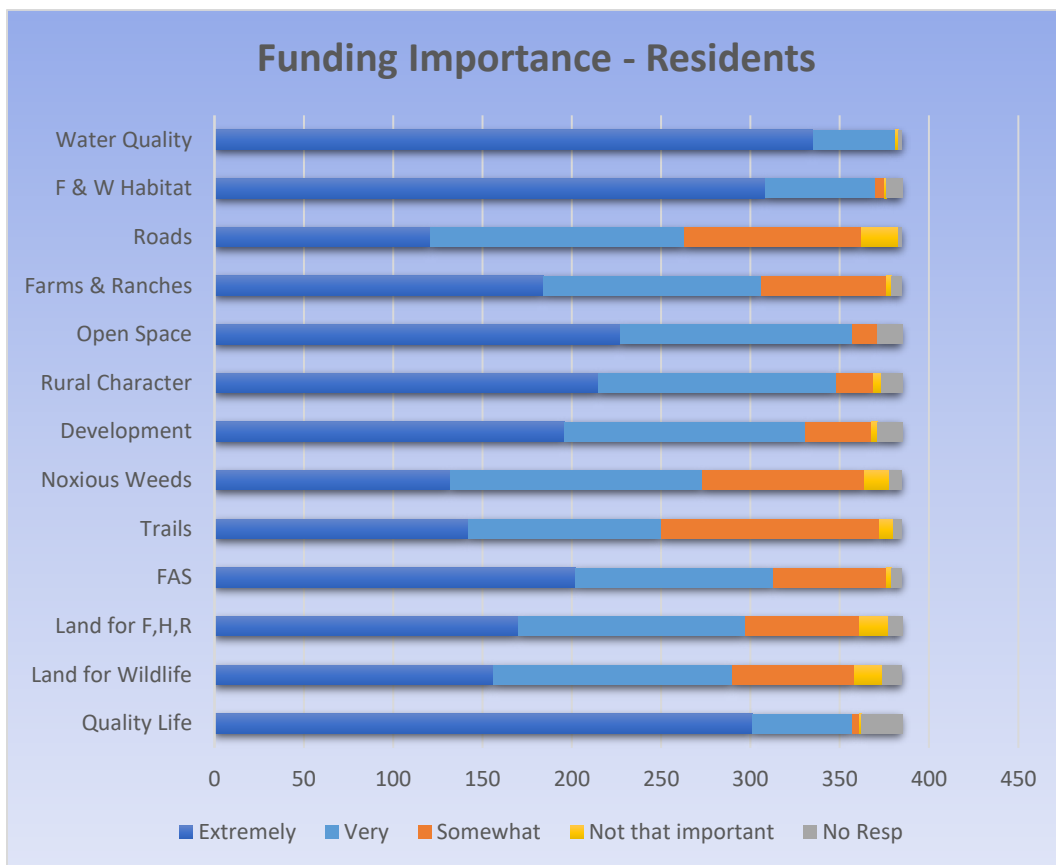
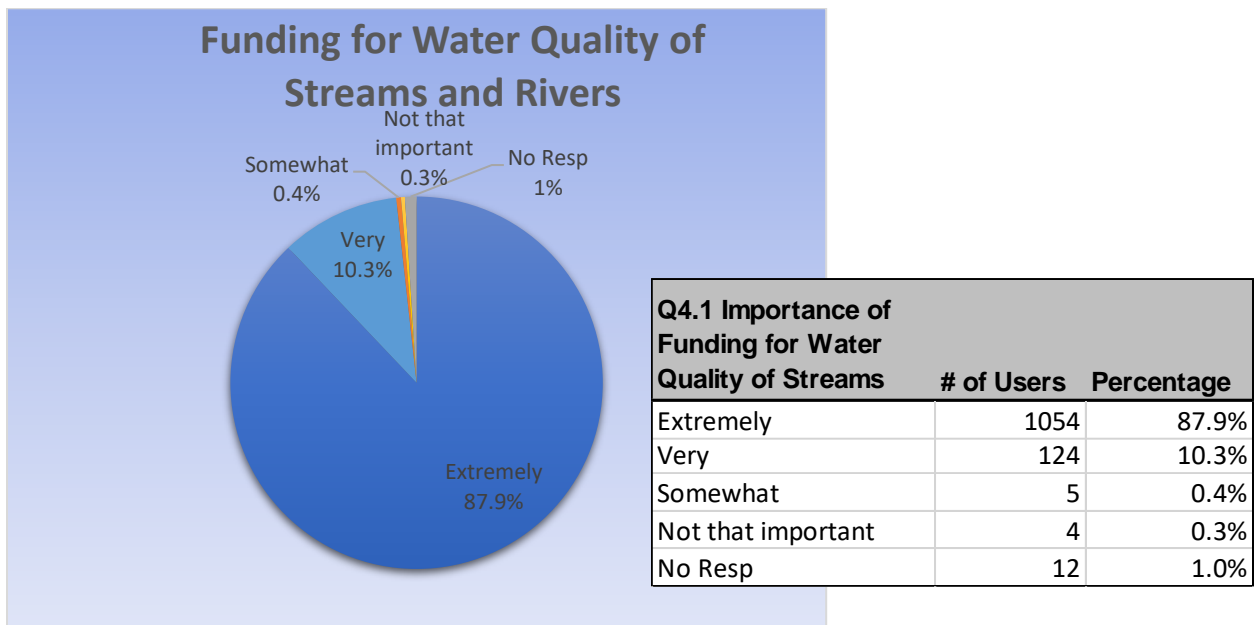


Figure 1B represents 385 residents sampled, which is 32% of 1,199 total recreation users sampled.

Resident Importance	Water Quality	Habitat	Roads	Farms & Ranches	Open Space	Rural Character	Development	Noxious Weeds	Trails	FAS	Land for F,H,R	Land for wildlife	Quality Life
Extremely	335	308	121	184	227	215	196	132	142	202	170	156	301
Very	46	62	142	122	130	133	135	141	108	111	127	134	56
Somewhat	0	5	99	70	14	21	37	91	122	63	64	68	4
Not that important	2	1	21	3	0	4	3	14	8	3	16	16	1
No Resp	2	9	2	6	14	12	14	7	5	6	8	11	23

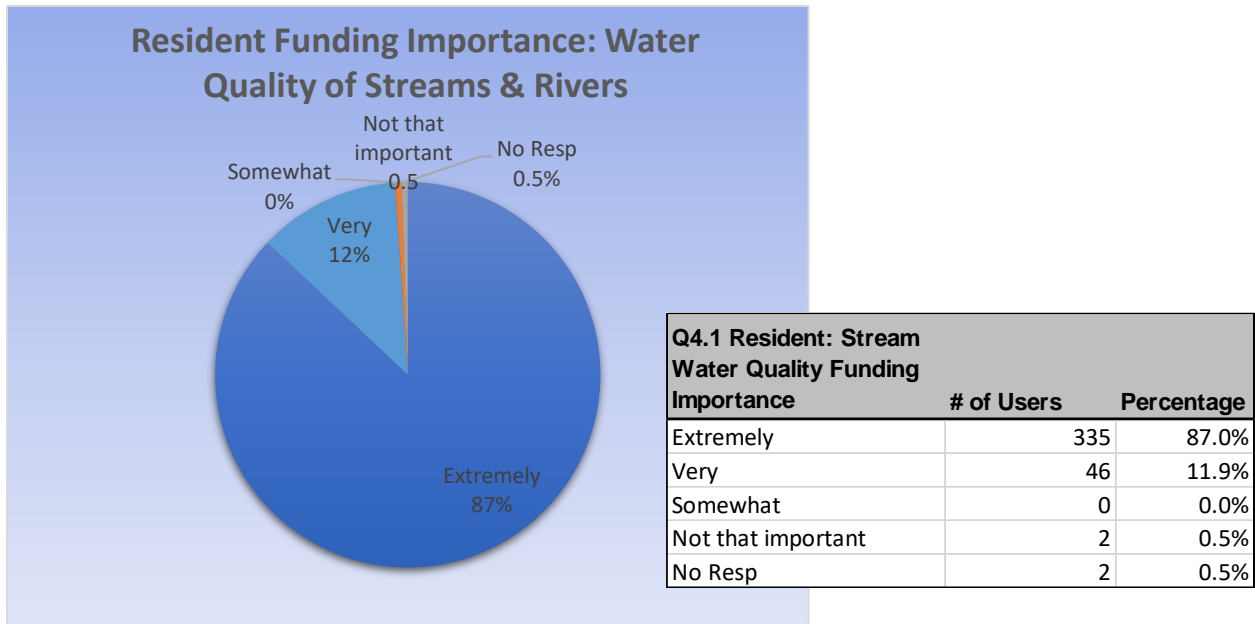
Figure 1B looks remarkably like Figure 1A. Despite a smaller sample size of 385 total residents, representing 32% of the 1,199 resident and non-residents (combined) sampled at Fishing Access Sites, resident and non-resident recreation users take a similar approach to desired outcomes for prioritizing funding. Protecting water quality of streams and rivers, conserving fish and wildlife habitat, protecting open space and quality of life continue to be ranked highest for future funding. A couple of differences between Figure 1A (residents and non-residents) and Figure 1B (residents only) are worth pointing out. Funding the protection of the rural character of the upper Yellowstone gateway corridor was significantly higher with residents than non-residents. Ninety percent (90%) of residents said protecting rural character is extremely or very important to fund compared to 85% of non-residents and residents combined. The other notable change between Figure 1A and Figure 1B is that residents value funding for roads higher than funding for trails, and that funding for noxious weeds is more important than funding for roads or trails.

FIGURE 2A. FUNDING IMPORTANCE FOR PROTECTING WATER QUALITY OF STREAMS AND RIVERS



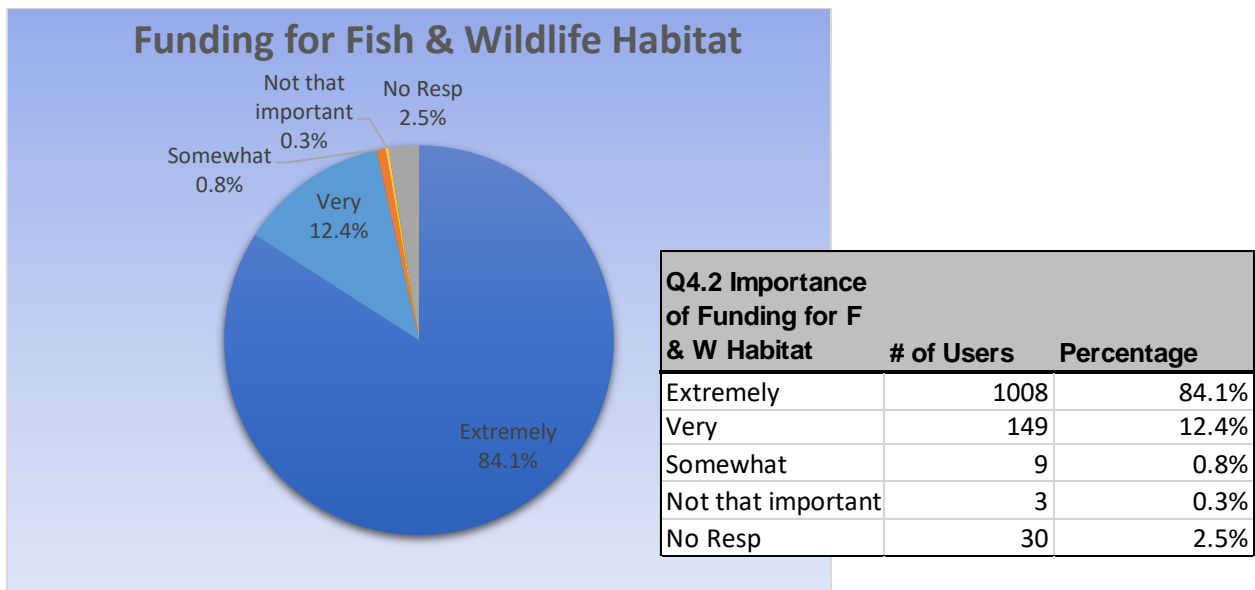
Overall, recreation users were most interested in funding projects that support water quality of streams and rivers. Out of 1,199 people surveyed – both residents and non-residents, 1,054 thought funding projects to support water quality of streams and rivers is extremely important and 124 people said funding water quality projects is very important. That equates to 1,178 people and 98% of the surveyed population.

FIGURE 2B. RESIDENT FUNDING IMPORTANCE FOR PROTECTING WATER QUALITY OF STREAMS & RIVERS



Resident support levels for funding projects that protect water quality of streams and rivers was nearly identical to the support level of non-residents and residents combined. When combining extremely important and very important as a metric, 99% of residents regard funding water quality as important compared to 98% of combined non-residents and residents.

FIGURE 3A. FUNDING IMPORTANCE FOR CONSERVING FISH AND WILDLIFE HABITAT



Conserving fish and wildlife habitat ranked second most important to recreation users. One thousand and eight (1,008) recreation users said conserving fish and wildlife habitat is extremely important and another 149-people said it is very important. That equates to 1,157 people and 96% of the surveyed population.

FIGURE 3B. RESIDENT FUNDING IMPORTANCE FOR CONSERVING FISH AND WILDLIFE HABITAT

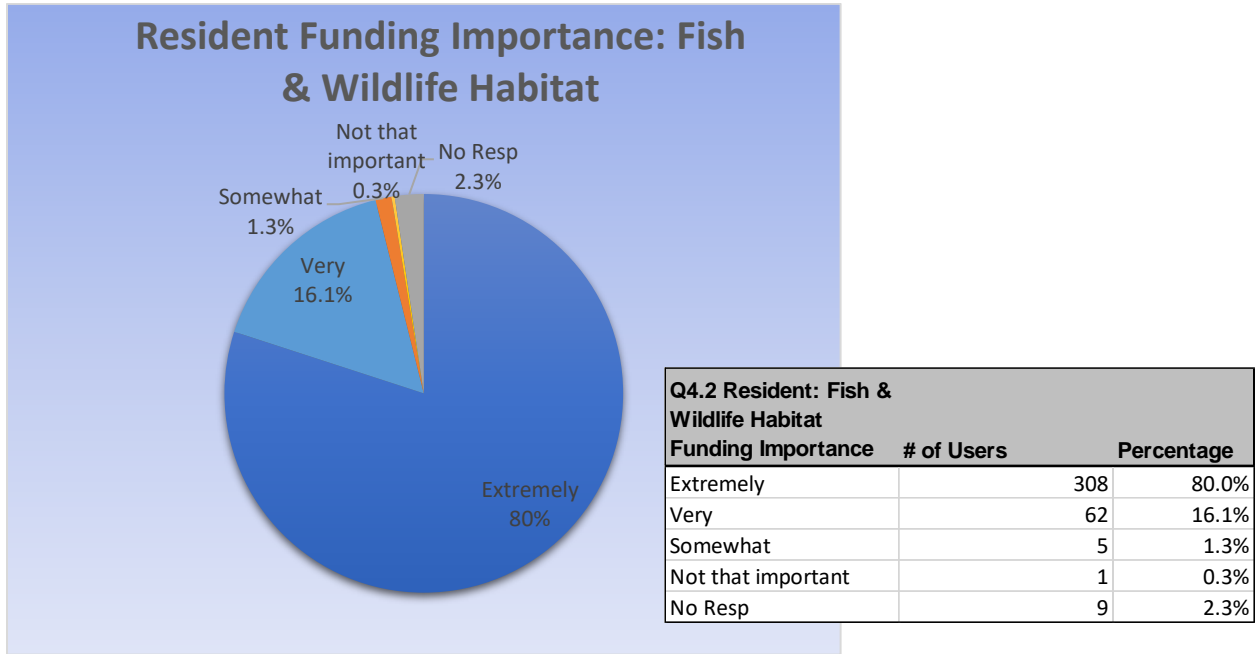
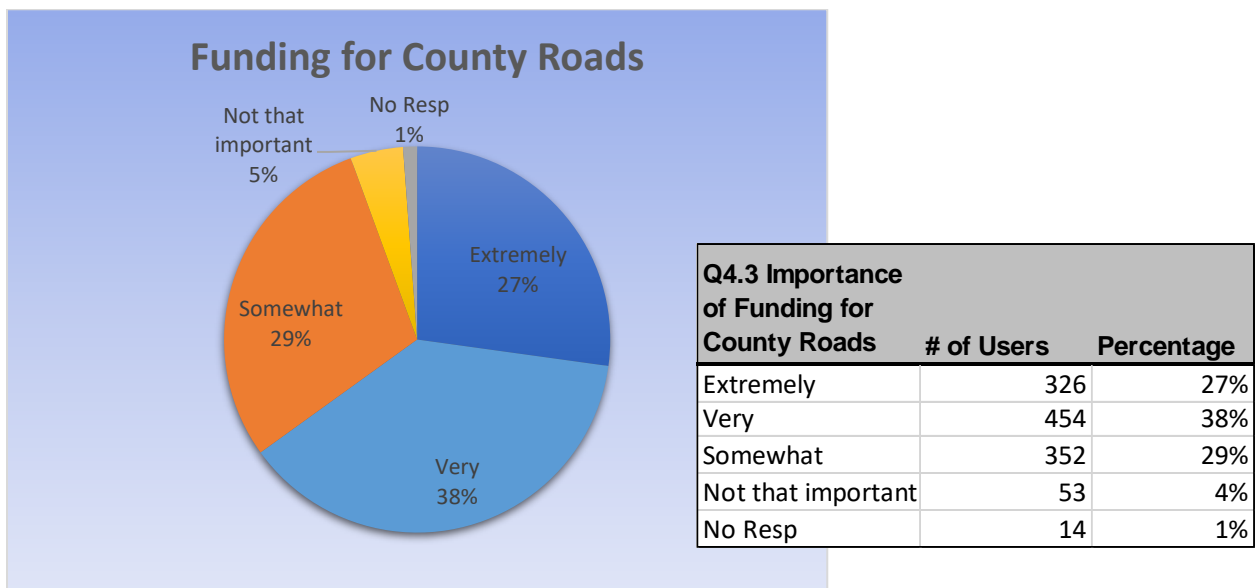


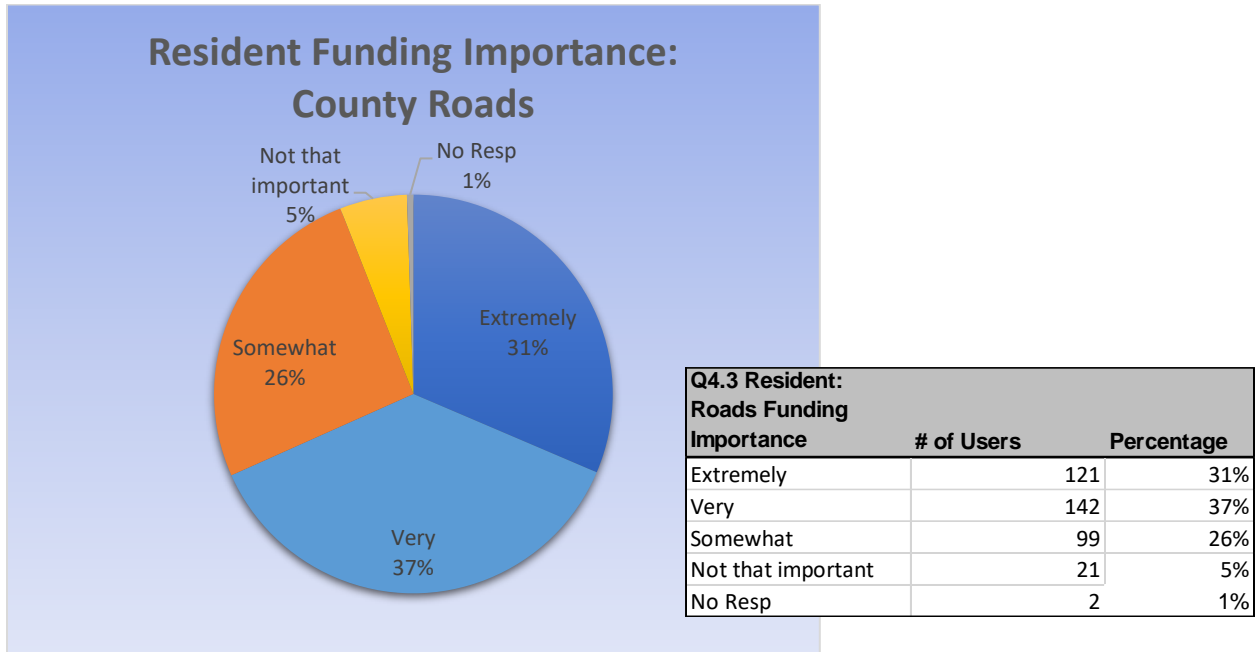
Figure 3B explains that out of 385 residents surveyed, 370 people said that it is either extremely important or very important to use a resort tax to fund conservation of fish and wildlife habitat. That equates to 96% of surveyed residents. This parallels non-residents and residents combined in Figure 3A.

FIGURE 4A. FUNDING IMPORTANCE FOR MAINTAINING OR UPGRADING COUNTY ROADS



Out of the thirteen potential funding applications, maintaining or upgrading county roads ranked the lowest with 326 people saying this is extremely important and 454 saying this is very important. But even these 780 people (combined) represent sixty-five percent (65%) of total people surveyed. Essentially, nearly two-thirds of the population surveyed believe that maintaining or upgrading Park County roads within the upper Yellowstone watershed is a high priority.

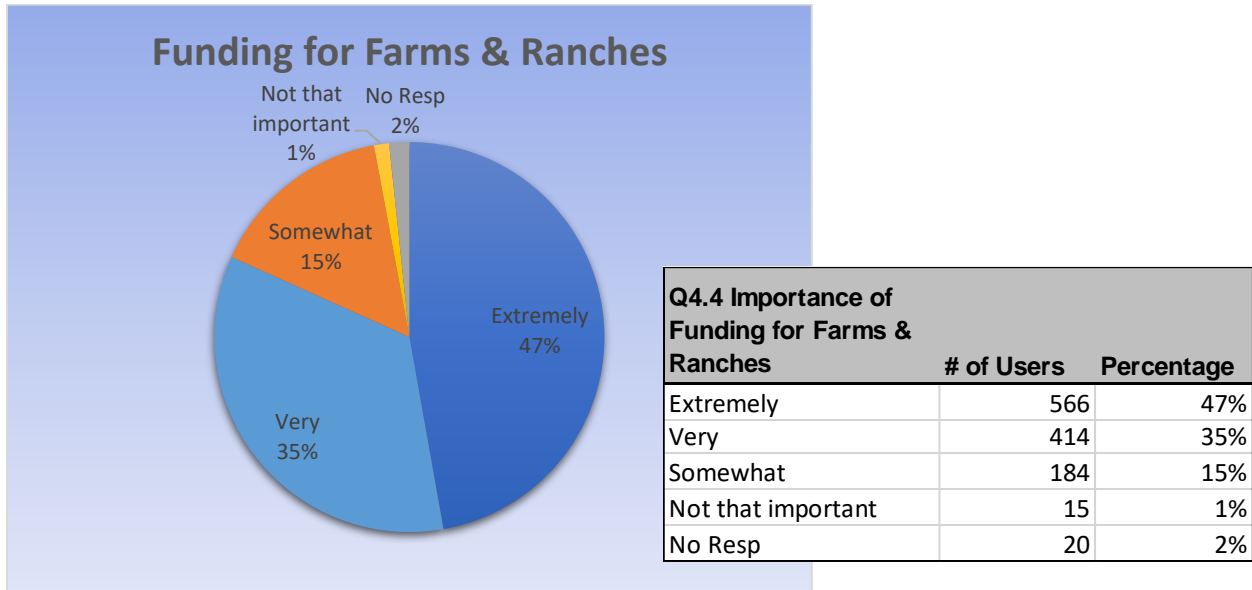
FIGURE 4B. RESIDENT FUNDING IMPORTANCE FOR MAINTAINING OR UPGRADING COUNTY ROADS



Q4.3 Resident: Roads Funding Importance		
Importance	# of Users	Percentage
Extremely	121	31%
Very	142	37%
Somewhat	99	26%
Not that important	21	5%
No Resp	2	1%

When examining exclusively resident support for using a resort tax to maintain or upgrade county roads (Figure 4B), 68% of resident recreation users described this use of potential tax dollars as extremely important or very important – a 3% increase from the combined non-resident and resident value.

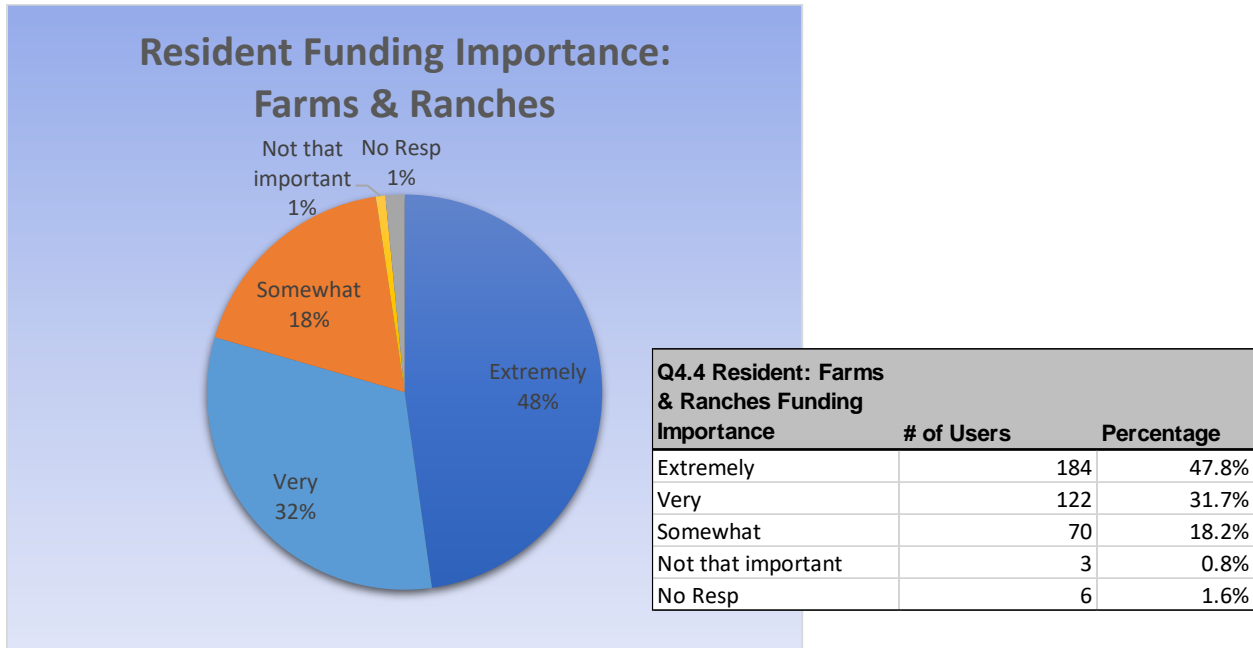
FIGURE 5A. FUNDING IMPORTANCE FOR CONSERVING FAMILY FARMS, RANCH LANDS, AND LOCAL FOOD PRODUCTION



During the design of this survey, the Greater Yellowstone Coalition believed it was important to ask residents and non-residents questions to address the value of maintaining working ranches and the agrarian lifestyle, which is a staple of much of Park County’s private landscape. While the Yellowstone River and public lands of the Custer Gallatin National Forest on either side of the valley provide world-class recreation opportunities and important spring, summer and fall habitat for many wildlife species, the Greater Yellowstone Coalition recognizes that it is also the private lands of the valley floor that give residents and non-residents the sense of open space and grandeur. Many of these large ranches have been managed as working landscapes for cattle ranching and livestock feed for generations. These same private lands offer indispensable winter habitat for elk, two deer species, bighorn sheep, and in the Gardiner Basin, bison. A few of the questions that address funding importance for the agrarian lifestyle include asking the public how they value funding for: *conserving family farms, ranch lands and local food production; conserving open space and scenic views; protecting the rural character of our county; conserving lands that are threatened by development; and managing noxious weeds.*

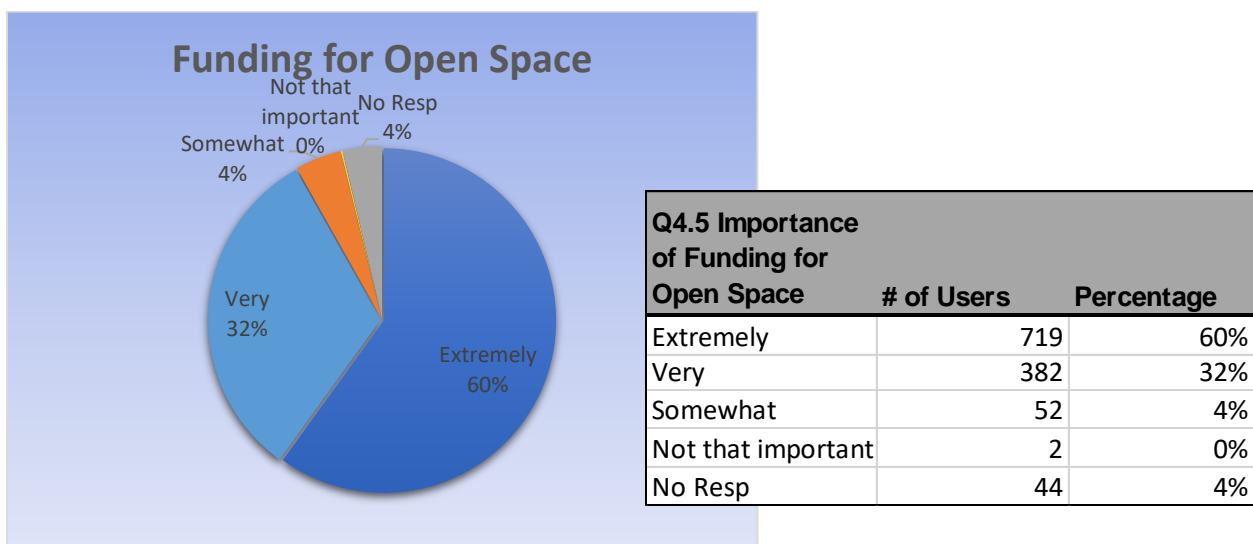
Providing funding for conserving farms, ranch lands and local food production received considerable support from recreation users. Nine hundred and seventy (970) recreation users said conserving farms and ranchlands is extremely important or very important. That equates to 82% of the surveyed population of non-residents and residents combined (Figure 5A).

FIGURE 5B. RESIDENT FUNDING IMPORTANCE FOR CONSERVING FAMILY FARMS, RANCH LANDS, AND LOCAL FOOD PRODUCTION



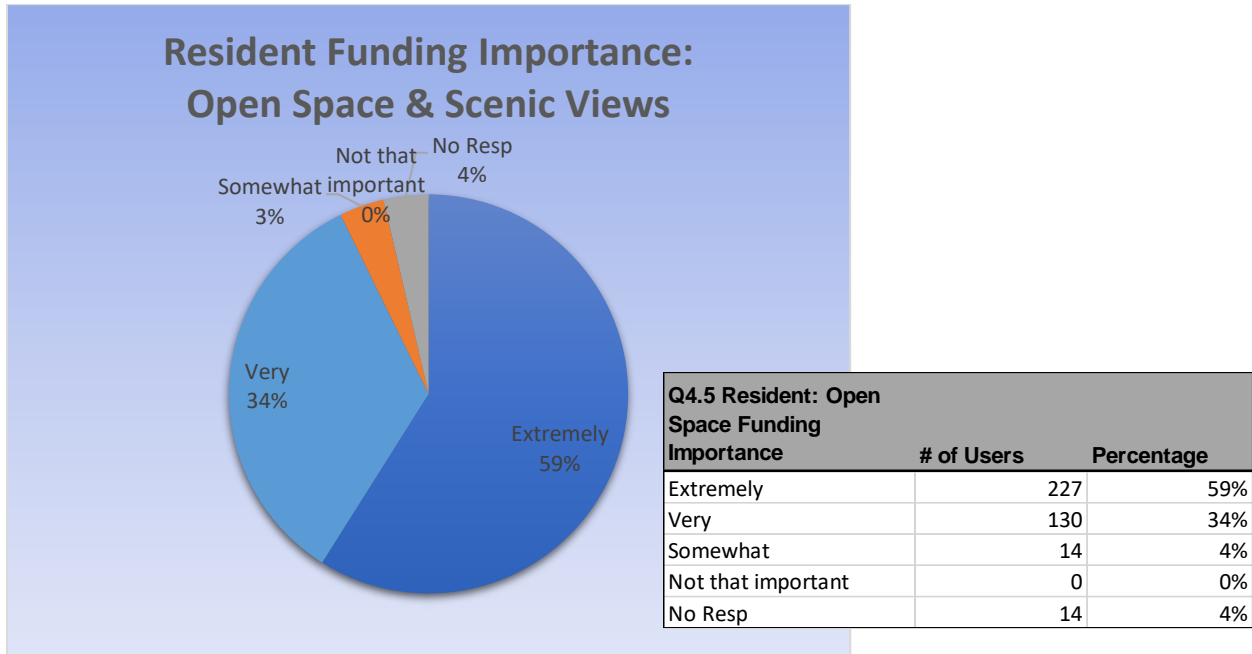
Comparatively, resident recreation users provided slightly less support for funding the conservation of farms and ranches. Three hundred and six (306) out of 385 resident recreation users said conserving farms and ranchlands is extremely important or very important. That equates to 78% of the surveyed population of residents (Figure 5B). The Greater Yellowstone Coalition might expect resident recreation users to have a higher level of support for maintaining and conserving farms and ranchlands compared to non-resident preferences. However, some responses that surveyors heard from residents were that farmers and ranchers should be responsible for their own land and not lean on the support from others.

FIGURE 6A. FUNDING IMPORTANCE FOR CONSERVING OPEN SPACE AND SCENIC VIEWS



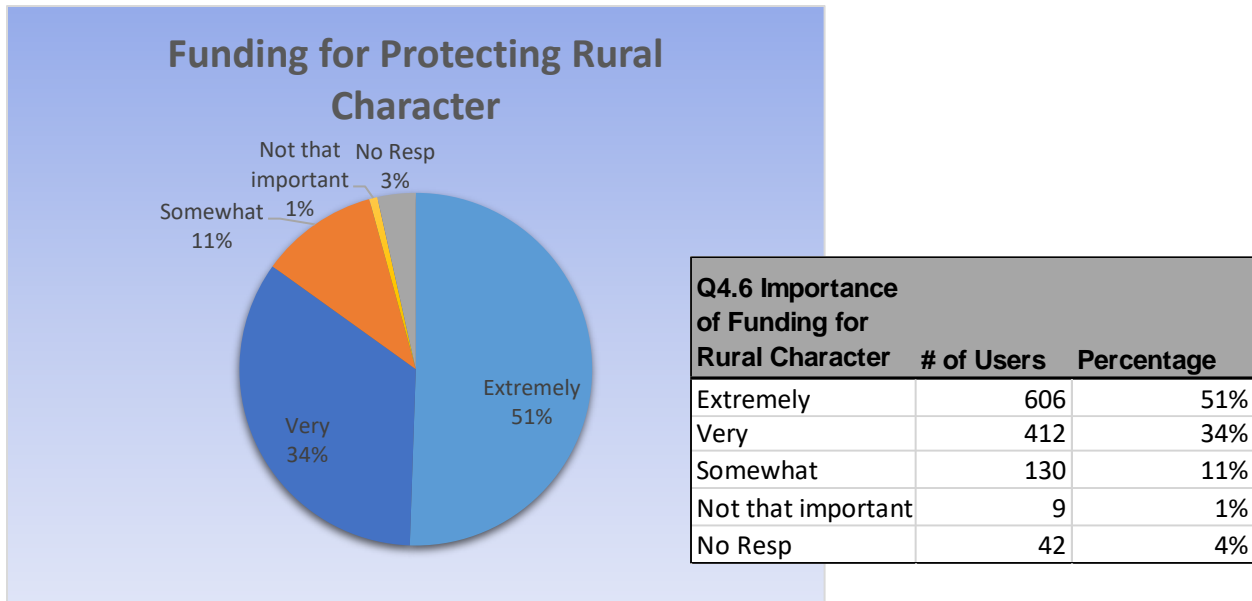
Conserving open space and scenic views ranked high among those surveyed with 719 people saying open space is extremely important and 382 people saying it is very important. That equates to 1,101 out of 1,199 people, which is 92% of the surveyed population.

FIGURE 6B. RESIDENT FUNDING IMPORTANCE FOR CONSERVING OPEN SPACE AND SCENIC VIEWS



Resident support for funding the conservation of open space and scenic views received similar support to non-resident support. Three hundred and fifty-seven (357) residents, representing 93% of surveyed residents view funding to conserve open space and scenic views as either extremely important or very important.

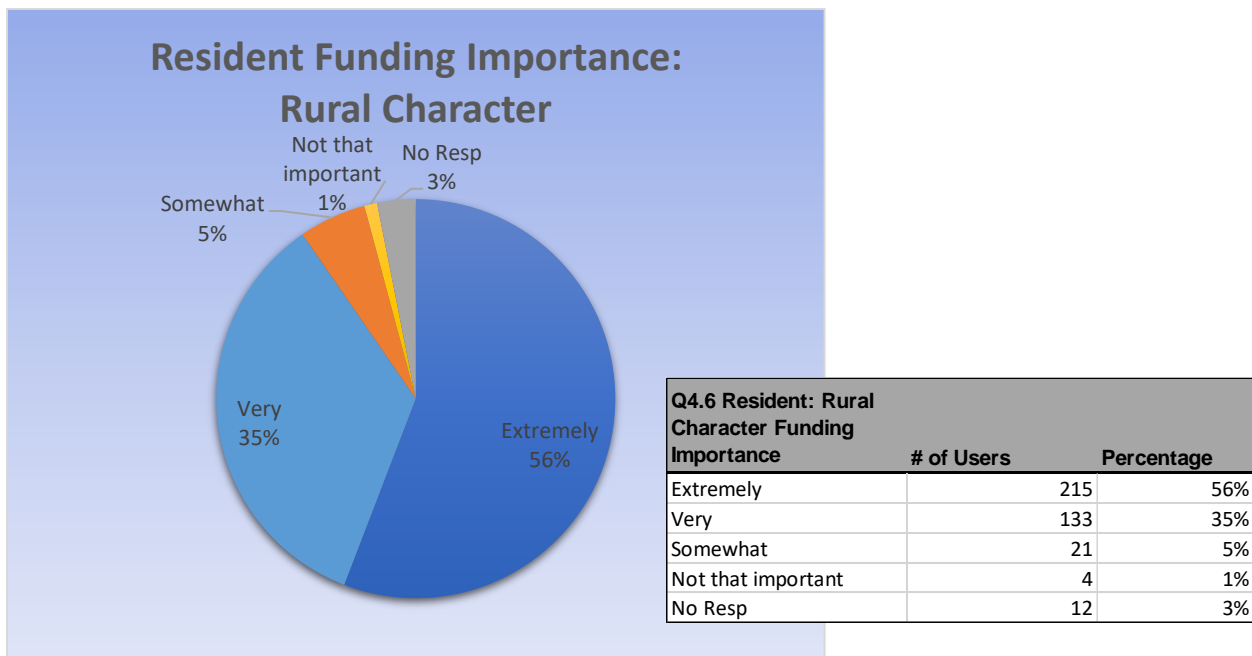
FIGURE 7A. FUNDING IMPORTANCE FOR PROTECTING RURAL CHARACTER OF PARK COUNTY



Q4.6 Importance of Funding for Rural Character		
Rural Character	# of Users	Percentage
Extremely	606	51%
Very	412	34%
Somewhat	130	11%
Not that important	9	1%
No Resp	42	4%

To this day, Park County maintains a rural character. While neighboring Gallatin County has experienced inexorable commercial and residential growth in the Gallatin Valley, which has led to extensive loss of some of Montana’s most fertile agricultural lands, much of Park County’s Shields and Paradise Valleys maintain their agrarian heritage. This is often expressed as a sense of pride by Park County residents, and something that separates Park and Gallatin County in terms of scenery and experience. Eighty-five percent (85%) of non-resident and resident recreation users considered funding for protecting the rural character of the upper Yellowstone gateway corridor to be extremely important or very important.

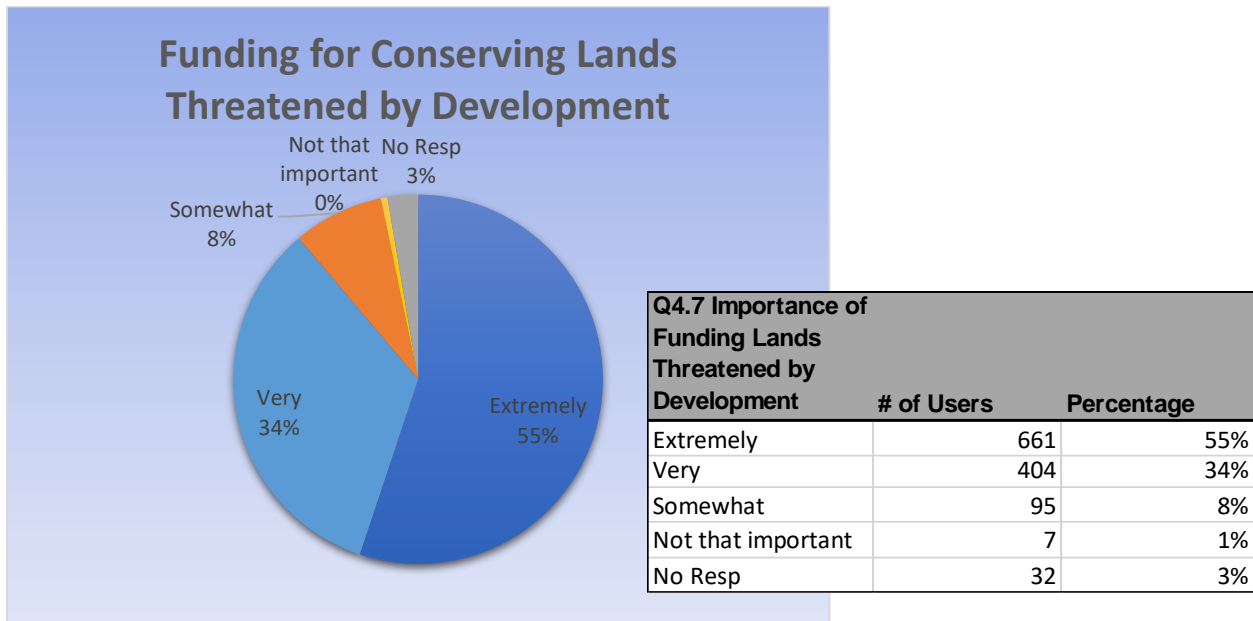
FIGURE 7B. RESIDENT FUNDING IMPORTANCE FOR PROTECTING RURAL CHARACTER OF PARK COUNTY



Q4.6 Resident: Rural Character Funding Importance		
Rural Character	# of Users	Percentage
Extremely	215	56%
Very	133	35%
Somewhat	21	5%
Not that important	4	1%
No Resp	12	3%

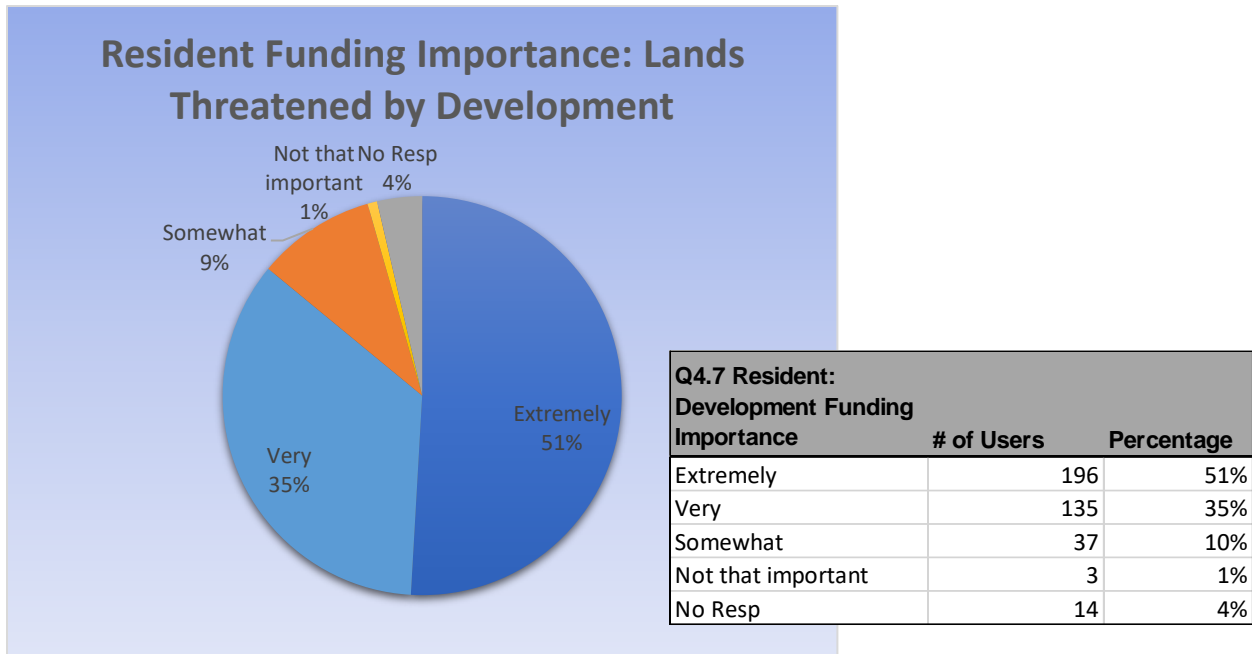
Not surprisingly, resident recreation users considered funding to protect the rural character of Park County to be more important than non-resident and resident recreation users combined. Three hundred and forty-eight (348) of 385 residents surveyed viewed funding to support protecting the rural character of Park County to be either extremely important or very important. This equates to 91% of resident recreation users.

FIGURE 8A. FUNDING IMPORTANCE FOR CONSERVING LANDS THREATENED BY DEVELOPMENT



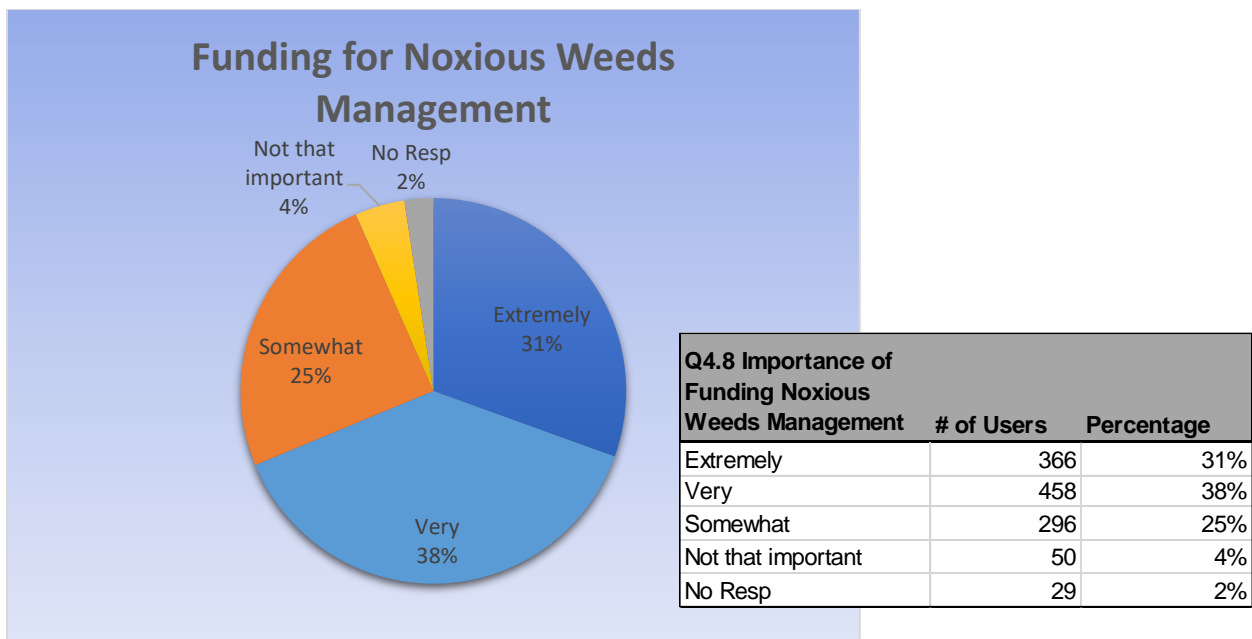
Conserving lands that are threatened by development ranked as the fifth most important place to allocate potential funds generated from a future resort tax. Out of 1,199 residents and non-residents surveyed, 661 people said it is extremely important to provide funding for conserving lands that are threatened by development and 404 people said this funding application is very important. These numbers equate to 88% of the surveyed population. This high of a number, which includes both residents and non-residents, indicates that the majority of recreation users in the upper Yellowstone gateway corridor view unrestricted development as a threat to the viewshed, natural resource health, and user’s quality of life. The results may also indicate that current users already view development levels in the upper Yellowstone gateway corridor as a problem, even though it does not compare in population density and development impacts to places such as the Gallatin or Bitterroot Valleys.

FIGURE 8B. RESIDENT FUNDING IMPORTANCE FOR CONSERVING LANDS THREATENED BY DEVELOPMENT



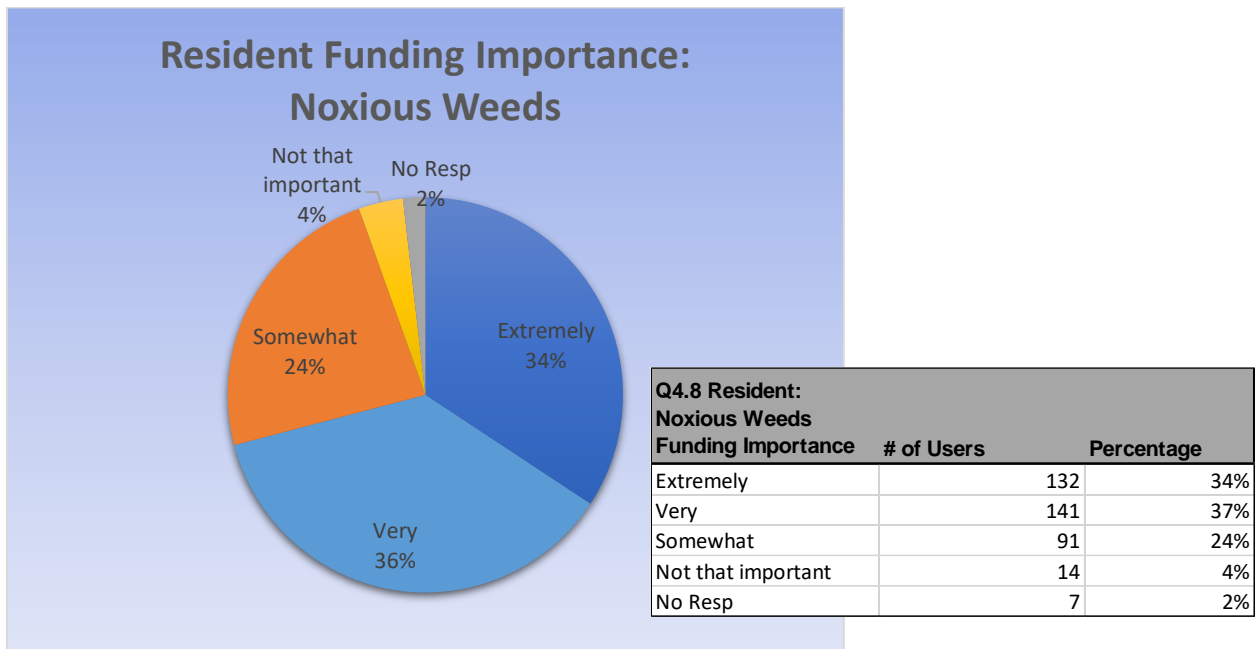
Residents had a similar level of value for allocating funds to address lands threatened by development. Three hundred and thirty-one residents believe it is extremely important or very important to fund projects that address lands threatened by development. That equates to 86% of resident recreation users.

FIGURE 9A. FUNDING IMPORTANCE FOR MANAGING NOXIOUS WEEDS



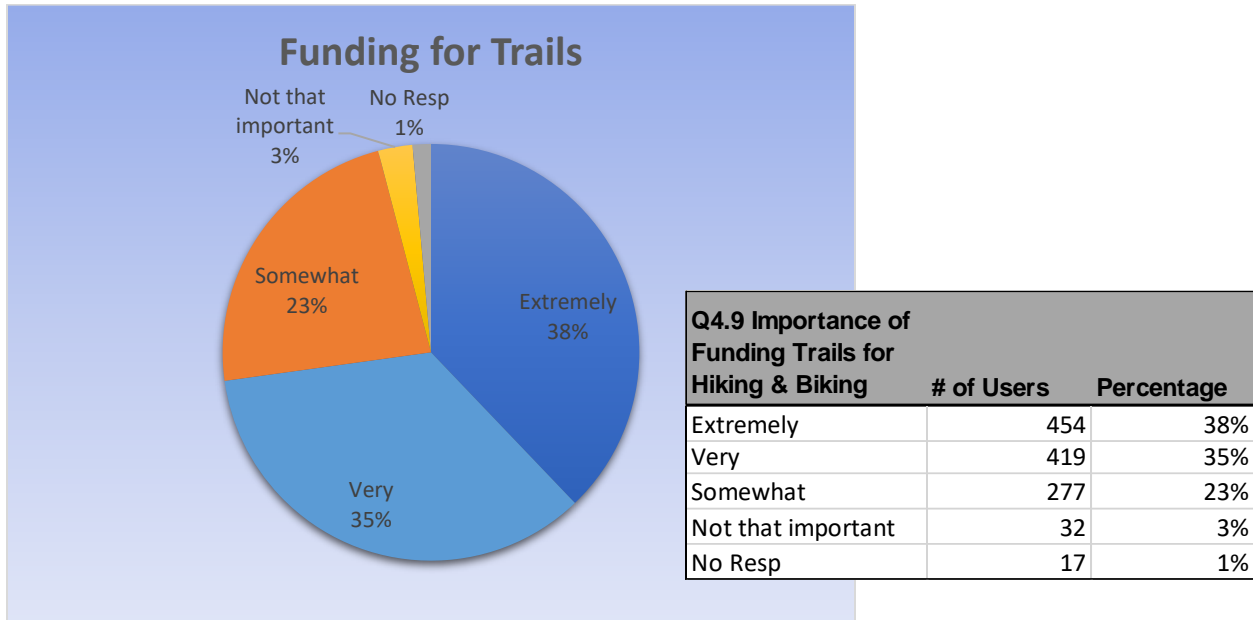
Park County ranchers often emphasize the need to better manage invasive noxious weeds. Ranchers add that this is a responsibility among all members of the community – ranchers, recreation users, and small land owners alike. While this issue is of grave concern across the American West, the results of this survey indicate that noxious weed management is slightly less important for recreation users compared to topics such as protecting water quality or open space. Among 1,199 non-residents and residents surveyed, 366 people said funding noxious weed management is extremely important while 458 people said this is very important. That represents 69% of the population in the survey who rate this issue as important.

FIGURE 9B. RESIDENT FUNDING IMPORTANCE FOR MANAGING NOXIOUS WEEDS



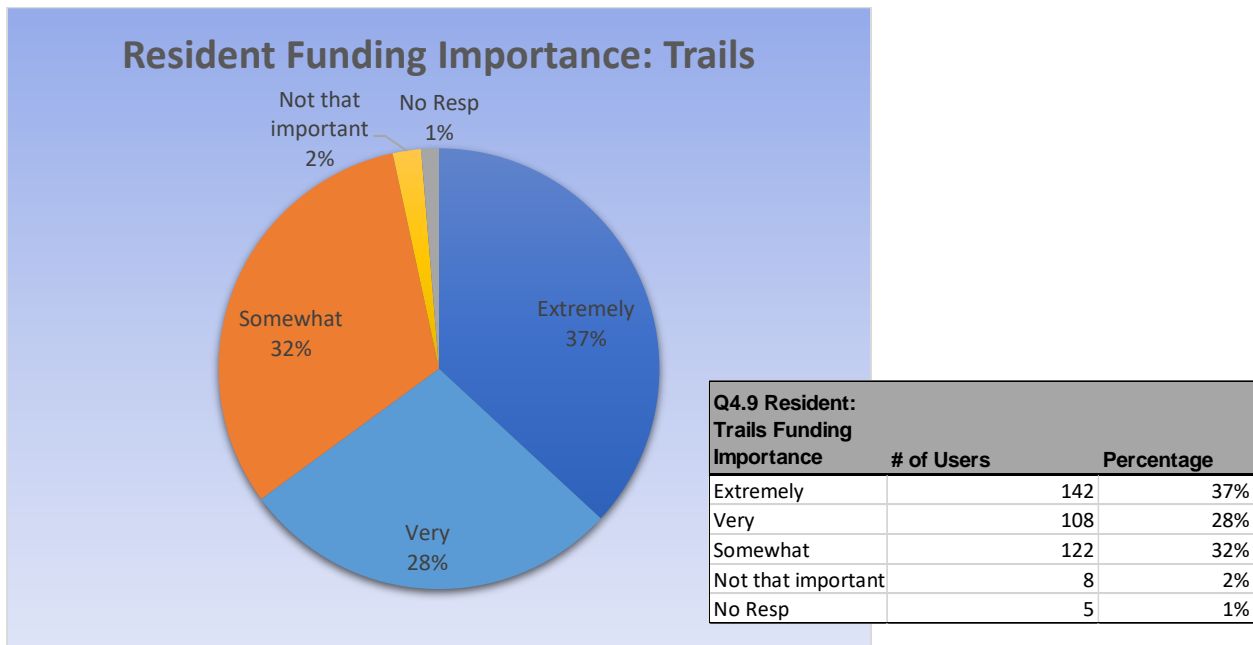
Resident support for funding noxious weed management was slightly higher than non-residents and residents combined. Seventy-one percent (71%) of resident recreation users believe it is extremely important or very important to fund the management of noxious weeds using resort tax revenue.

FIGURE 10A. FUNDING IMPORTANCE FOR EXTENDING, CONNECTING AND MAINTAINING TRAILS FOR HIKING, WALKING AND BIKING



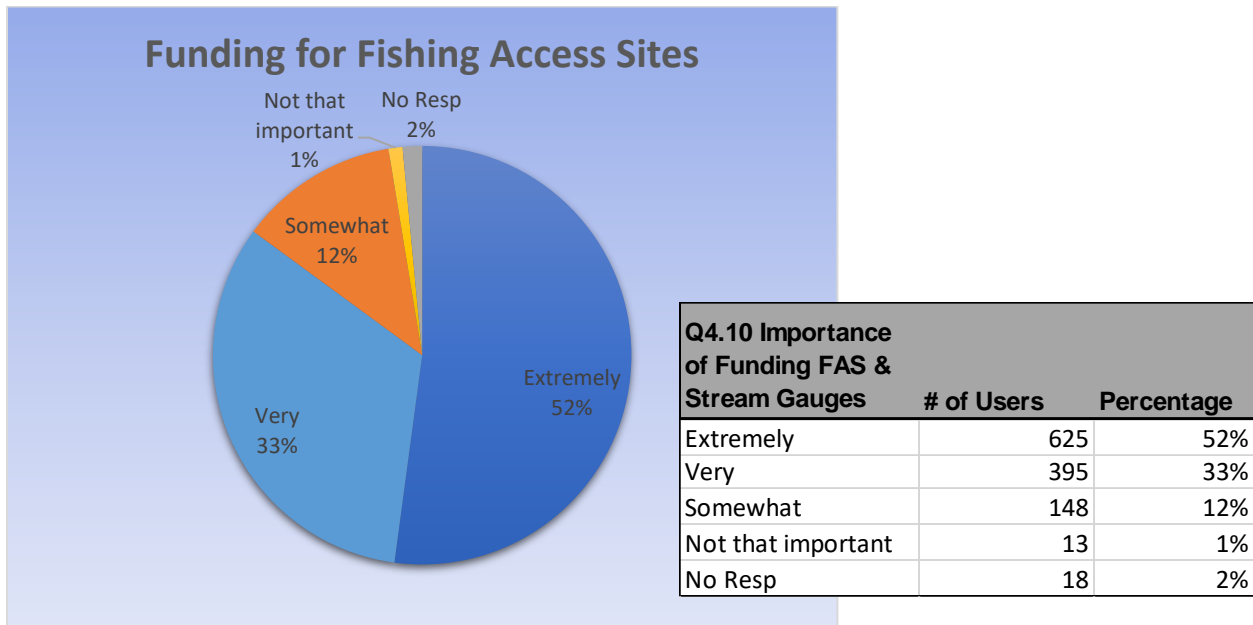
Funding for extending, connecting and maintaining trails for hiking, walking and biking was perceived as important in Park County. Among 1,199 non-resident and resident recreation users surveyed, 454 people rated funding as extremely important and 419 people rated funding as very important for maintaining trails. This represents 73% of the surveyed population.

FIGURE 10B. RESIDENT FUNDING IMPORTANCE FOR EXTENDING, CONNECTING AND MAINTAINING TRAILS FOR HIKING, WALKING AND BIKING



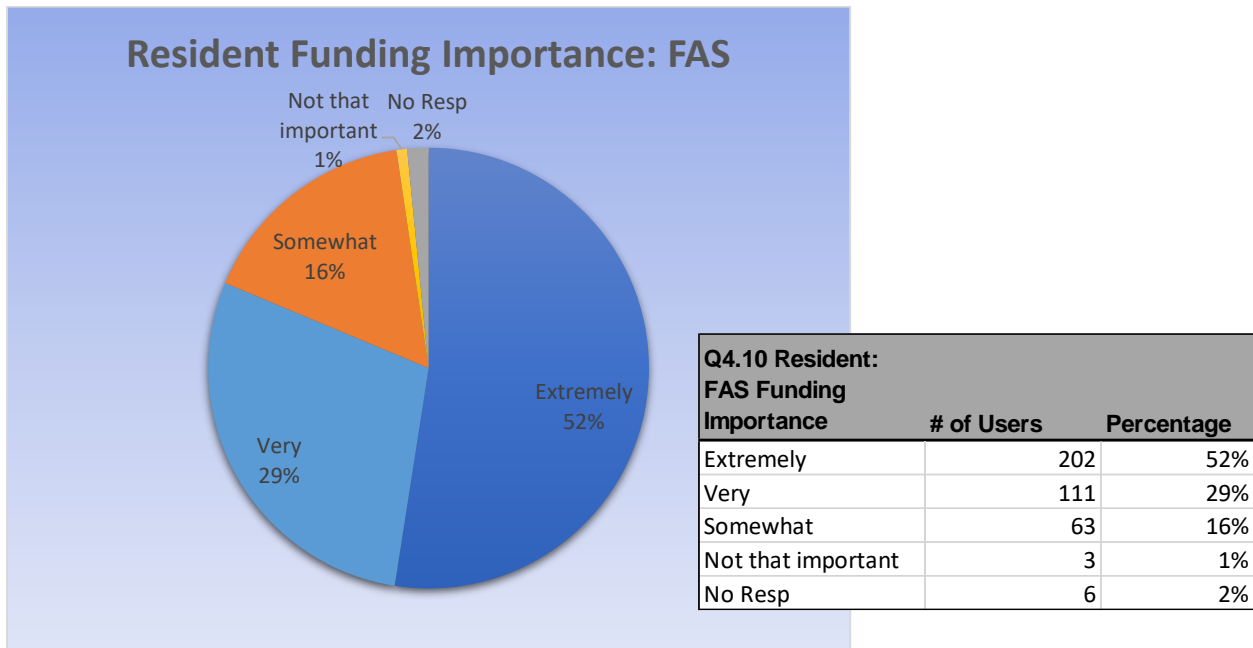
Resident recreation users said funding for extending, connecting and maintaining trails for hiking, walking and biking was less important than many other potential investments. Among 385 residents surveyed, 142 said funding of trails was extremely important while 108 people said it was very important. These two categories of respondents represent 65% of the population (Figure 10B).

FIGURE 11A. FUNDING IMPORTANCE FOR MAINTAINING OR ENHANCING FISHING ACCESS SITES AND STREAM GAUGES



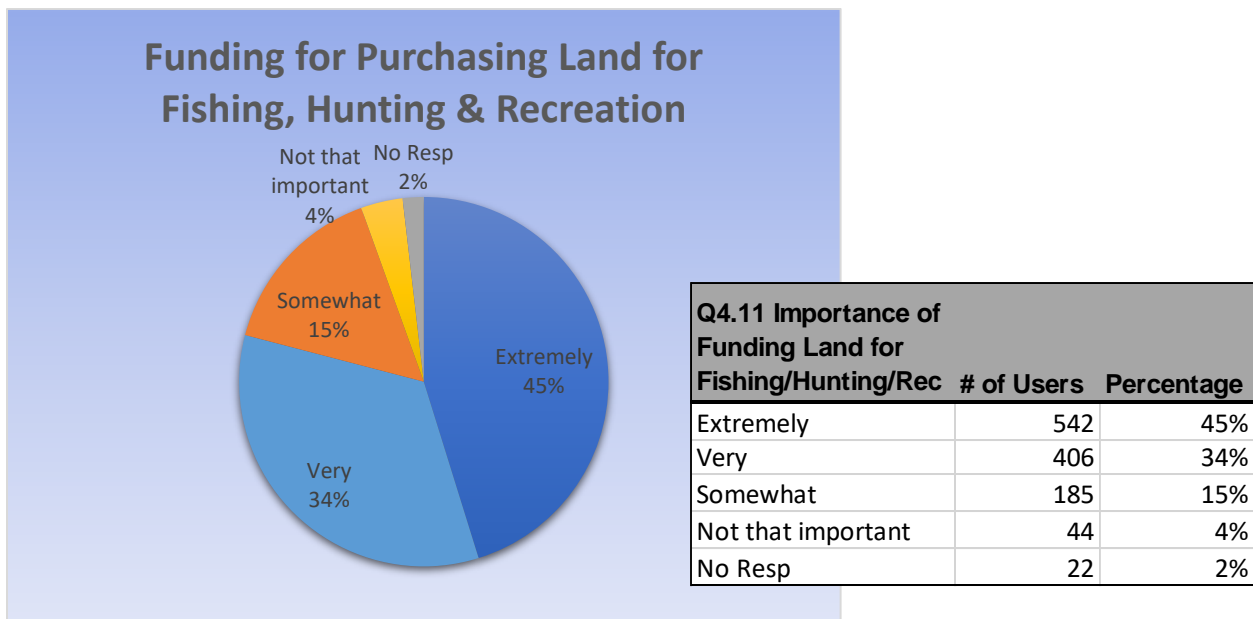
Maintaining or enhancing Fishing Access Sites and stream gauges ranked as the sixth most important resource to allocate potential funds generated from a future resort tax. Out of 1,199 residents and non-residents surveyed, 625 people said it is extremely important to provide funding for these two recreation assets, and 395 people said it is very important to fund these recreation assets. This accounts for 85% of the population. It should come as no surprise that funding for Fishing Access Sites and stream gauges ranks high in support. After all, these access points are the main public entryway to the Yellowstone River, which is a massive economic generator for the Park County community and an important recreation outlet, especially in early spring and mid-to-late summer. Stream gauges also serve as a critical indicator for fishing, recreation and irrigation opportunities in the valley.

FIGURE 11B. RESIDENT FUNDING IMPORTANCE FOR MAINTAINING OR ENHANCING FISHING ACCESS SITES AND STREAM GAUGES



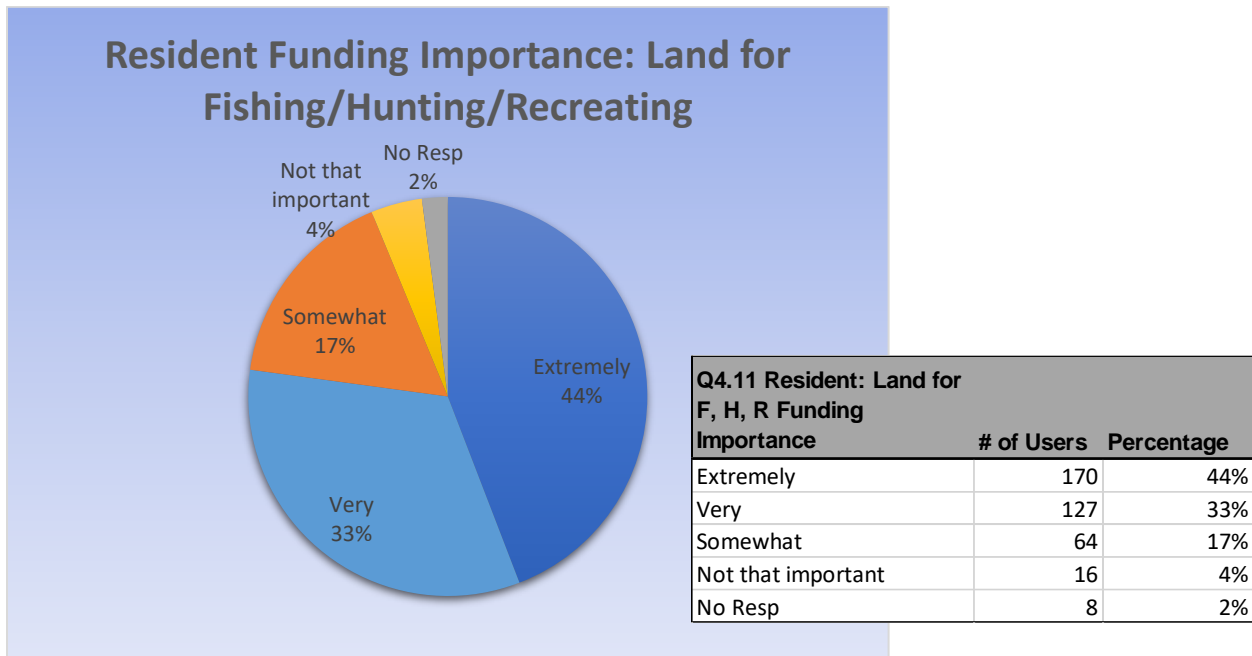
Many Montanans now recognize that Fishing Access Sites (FAS) and stream gauges lack appropriate funding across the state. Perhaps this explains why resident support for funding Fishing Access Sites and stream gauges received considerable support. Eight-one percent (81%) of residents believe it is either extremely important or very important to fund this resource using revenue from a potential regional resort tax (Figure 11B).

FIGURE 12A. FUNDING IMPORTANCE FOR PURCHASING LANDS FOR FISHING, HUNTING AND RECREATION



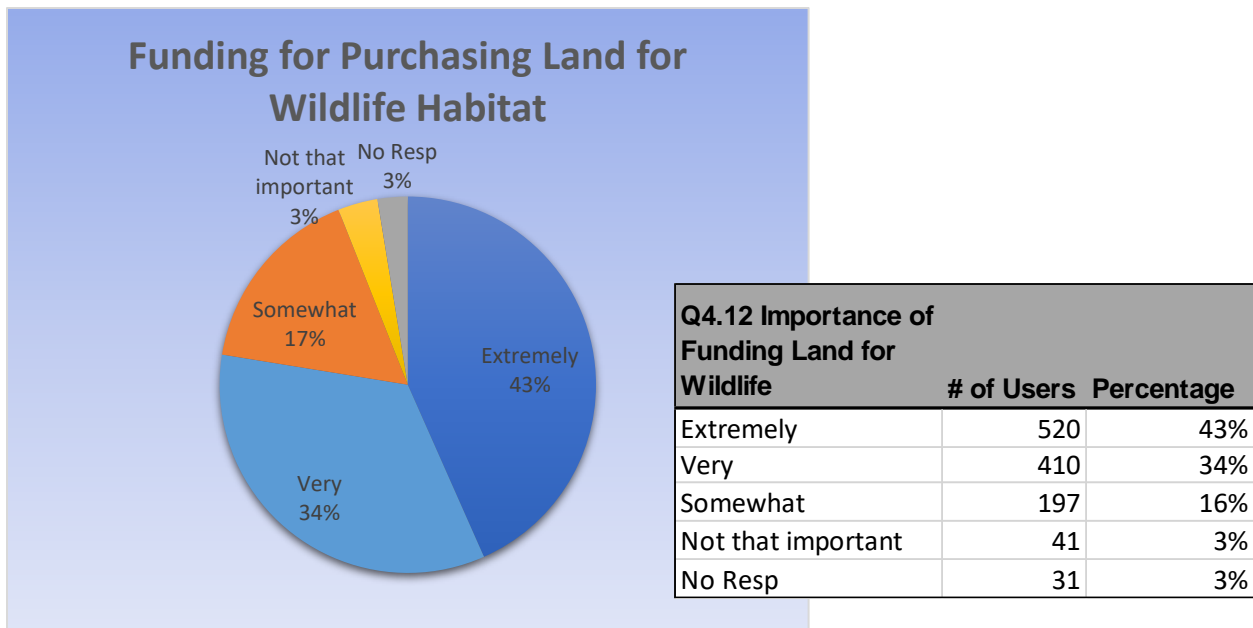
As large sections of private land are bought and sold in Park County, some recreation users have expressed interest in seeing resort tax revenue support opportunities to purchase high value land for fishing and hunting. Funding for purchasing land for fishing, hunting and recreation has considerable appeal among non-resident and resident recreation users. Among 1,199 recreation users, 542 people said funding for purchasing land for fishing and hunting is extremely important and 406 people said it is very important. Combined, this represents 79% of the surveyed population.

FIGURE 12B. RESIDENT FUNDING IMPORTANCE FOR PURCHASING LANDS FOR FISHING, HUNTING AND RECREATION



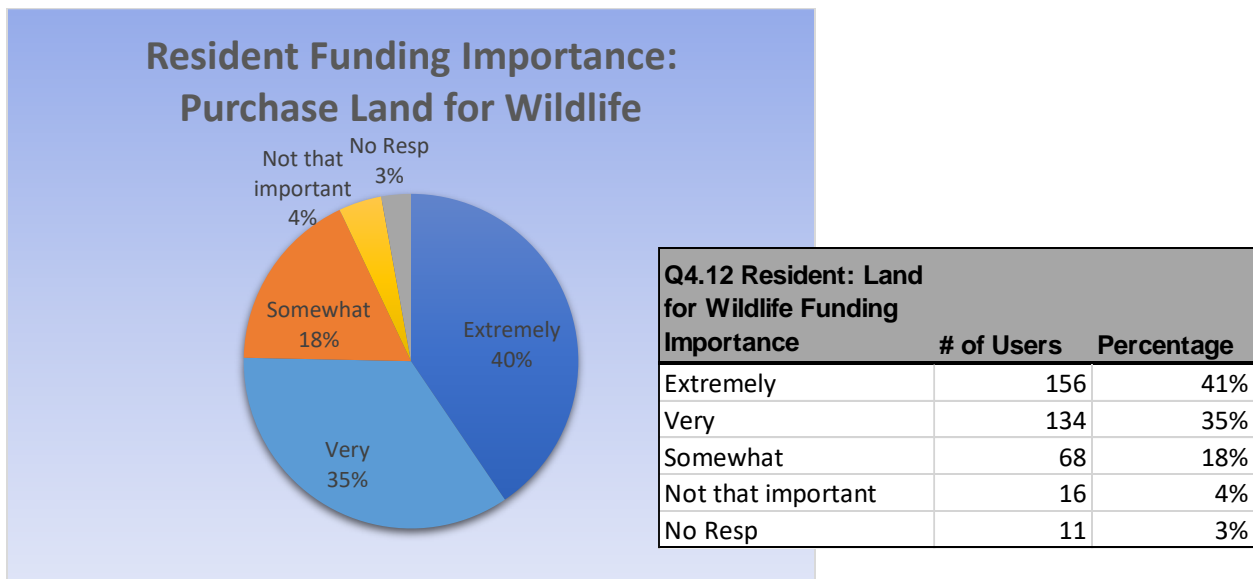
Resident recreation users said that funding importance for purchasing land for fishing, hunting and recreating is important. Seventy-seven percent (77%) of residents said this funding application was either extremely important or very important. This compares closely, albeit slightly lower, than preferences for funding the purchase of land for recreation by non-residents.

FIGURE 13A. FUNDING IMPORTANCE FOR PURCHASING LANDS FOR WILDLIFE HABITAT



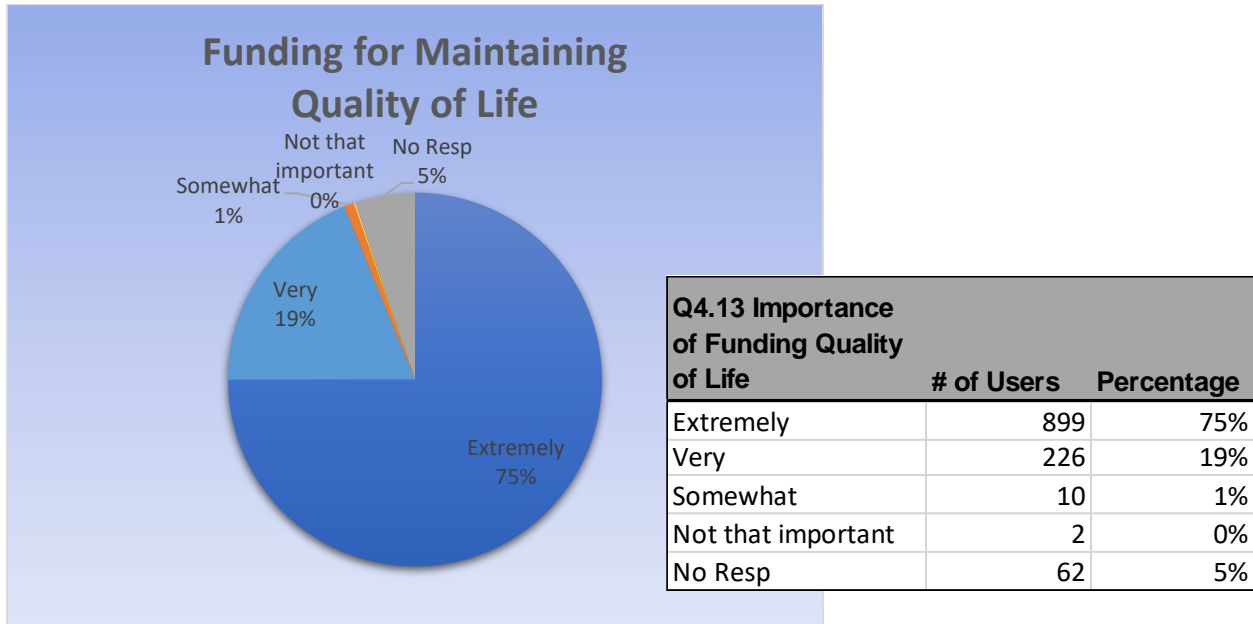
As large chunks of private land are bought and sold in Park County, some conservationists and general members of the public have expressed interest in seeing resort tax revenue support opportunities to purchase high value land for wildlife habitat. Funding for purchasing land for wildlife habitat has moderate appeal among non-resident and resident recreation users. Among 1,199 recreation users, 520 people said funding for purchasing land for wildlife habitat is extremely important and 410 people said it is very important. Combined, this represents 77% of the surveyed population.

FIGURE 13B. RESIDENT FUNDING IMPORTANCE FOR PURCHASING LANDS FOR WILDLIFE HABITAT



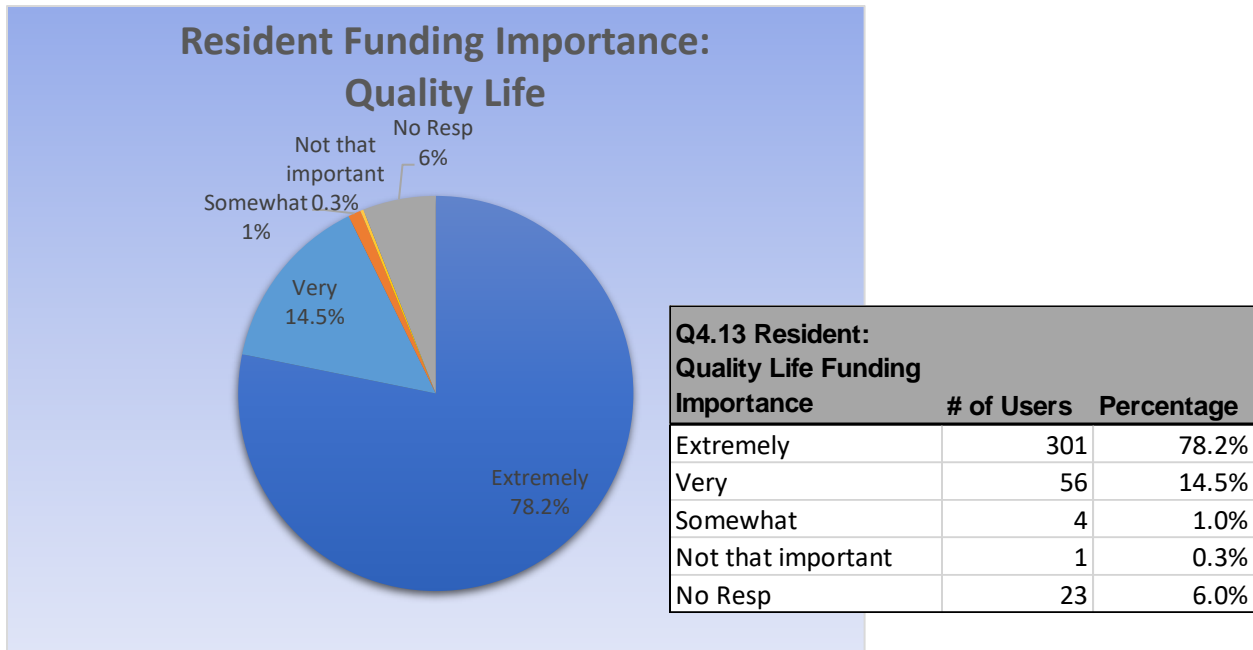
Resident values for purchasing lands for wildlife habitat are very close to non-resident values. Seventy-six percent (76%) of residents said it is extremely important or very important to fund land acquisitions for wildlife habitat.

FIGURE 14A. FUNDING IMPORTANCE FOR MAINTAINING QUALITY OF LIFE



Maintaining quality of life ranked third most valuable with 899 out of 1,199 people saying this is extremely important and 226 saying it is very important. That equates to 1,125 people and 94% of the surveyed population. Quality of life is, admittedly, a challenging measurement to quantify because it means different things to different people. For some it may mean access to recreation opportunities, for others it may mean quiet country roads, seeing the stars at night, low human population density, open space, working agricultural landscapes or multiple generations floating the Yellowstone River together. The fact that quality of life ranked so high in this survey is a clear indication that people – both residents and non-residents – appreciate the natural assets that the upper Yellowstone gateway corridor affords, and these people would prefer to keep the place that way.

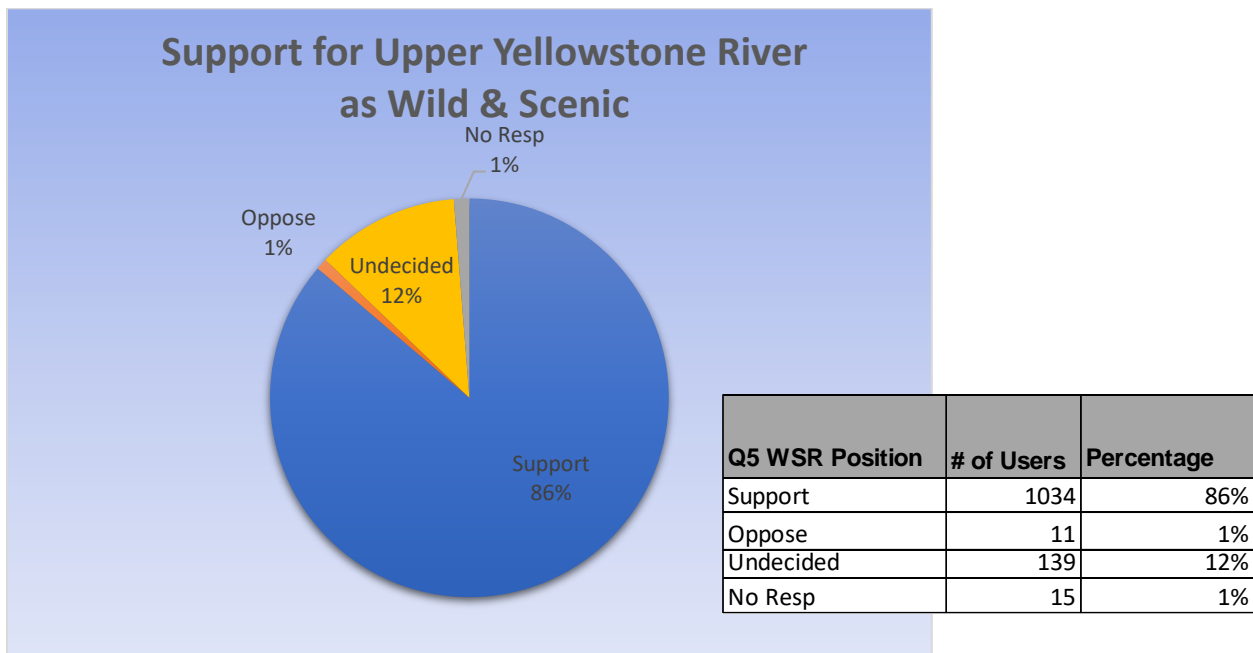
FIGURE 14B. RESIDENT FUNDING IMPORTANCE FOR MAINTAINING QUALITY OF LIFE



Maintaining quality of life is extremely important for residents. Three hundred and one (301) out of 385 residents said funding for quality of life is extremely important and 56 said it is very important. That equates to 357 people and 92% of the surveyed resident recreation user population.

II. SUPPORT FOR WILD & SCENIC RIVER DESIGNATION

FIGURE 15A. RECREATION USER SUPPORT FOR WILD & SCENIC RIVER DESIGNATION OF YELLOWSTONE



The Greater Yellowstone Coalition recognizes that it is valuable to understand how recreation users feel about a potential Wild & Scenic River designation of the upper Yellowstone River from Gardiner to the Carbella Fishing Access Site, just downstream of Yankee Jim Canyon. For eight years, the Greater Yellowstone Coalition has been a lead steering committee member of a coalition called Montanans for Healthy Rivers (MHR). Formed in 2010, Montanans for Healthy Rivers is a broad-based coalition of Montana businesses, conservation organizations, angling and hunting groups, watershed groups, land trusts, and riverside landowners who know that clean water and free-flowing rivers are important to Montana's economy and way of life. Given the threats that Montana rivers face from climate change, new dams, energy development, floodplain development, mining and potential interstate water diversion schemes, we feel that now is the time to protect the streams that Montanans value the most.

One interest of Montanans for Healthy Rivers has been to support communities who cherish clean water and free-flowing rivers by working with residents and Montana's U.S. congressional delegation to protect Montana's iconic streams through Wild and Scenic Rivers Act designations on public lands.

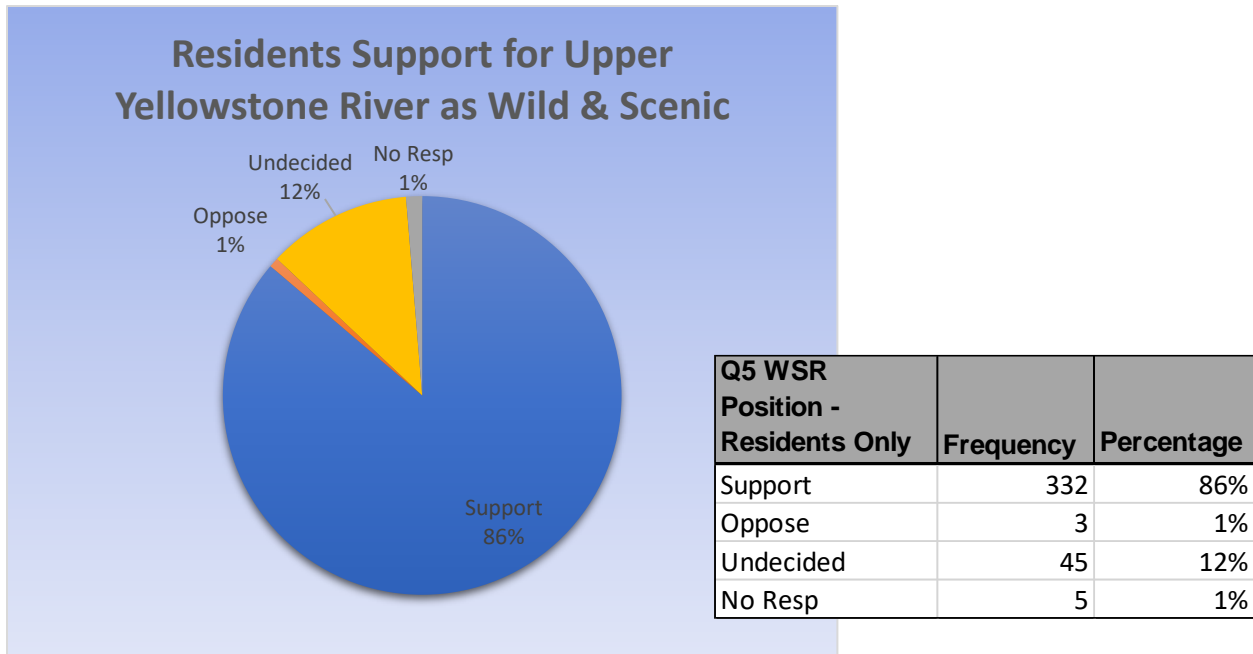
After listening to Montanans desires for protecting important streams for eight years, Montanans for Healthy Rivers has created a draft legislative proposal, which asks the Montana congressional delegation to introduce the Montana Headwaters Security Act as new Wild and Scenic legislation in 2019. The proposal includes an upper reach of the Yellowstone River and is composed of other high-value, public lands streams in the Crown of the Continent and Greater Yellowstone Ecosystems. The streams in those regions are tributaries of five major rivers, all nominated by Montanans: the Clark Fork, Flathead, Swan, Missouri and Yellowstone Rivers. The full list includes 43 stream segments totaling 673 stream miles - less than 0.25% of Montana's 177,000 miles of streams.

To date, the proposal has garnered the support of over 2,000 official endorsements, including more than 1,000 businesses, four chambers of commerce, and business organizations such as Fishing Outfitters Association of Montana (representing 700 outfitters and guides) and Business for Montana Outdoors (representing 120 businesses). We are also proud to have the support of the Confederated Salish and Kootenai Tribes, the Rocky Mountain Tribal Leaders Council, the Professional Wilderness Outfitters Association and Montana's Fish, Wildlife and Parks Commission.

Businesses and private land owners between Livingston and Gardiner have been incredibly supportive of using the Wild & Scenic Rivers Act to protect the upper Yellowstone's water quality and remarkable recreation, scenic and wildlife values. The draft legislation has received support from scores of local businesses, including companies such as Chico Hot Springs, Sage Lodge, Montana Rib & Chop House and the Gardiner Chamber of Commerce.

Results of the survey indicate that resident and non-resident recreation users are extremely supportive of Wild and Scenic River protections for the upper Yellowstone. Figure 15A shows that 86% of recreation users support Wild & Scenic River protections, 12% are undecided, and 1% oppose. Resident support identically matches the collective support (see Figure 15B below). When broken down by political ideology, results show that Republicans lend 86% support and 2% opposition (12% undecided) and Democrats give 91% support and 1% opposition (8% undecided). One should, however, approach the results of political ideology related to support for Wild & Scenic River protections with some caution as only 30% of the surveyed population responded to reveal his/her political ideological leanings. The other 70% of the surveyed population left this demographic question blank during the survey.

FIGURE 15B. RESIDENT SUPPORT FOR WILD & SCENIC RIVER DESIGNATION OF YELLOWSTONE



III. SUPPORT FOR THE YELLOWSTONE GATEWAY PROTECTION ACT

In 2015, the Greater Yellowstone Coalition learned of two large scale mine proposals on the doorstep of Yellowstone National Park in Park County, Montana. Two foreign mining companies planned to explore for gold on Crevice Mountain, literally a stone’s throw away from Yellowstone National Park, and on Emigrant Peak – an iconic mountain in the heart of Paradise Valley. Residents and business owners immediately viewed the two gold mines as a threat to private property rights, the Yellowstone River's clean water, and the already thriving local economy supported largely by outdoor recreation, tourism and agriculture.

The Greater Yellowstone Coalition has worked with fellow conservation partners and a robust Yellowstone Gateway Business Coalition, comprising over 400 local businesses, to oppose the two mines. The uprising of local grassroots advocacy led to: 1) a 2-year mineral withdrawal on 30,000 acres of public land by Secretary of Interior Sally Jewell in 2016; 2) a legislative bill introduction in both chambers of U.S. Congress by Senator Jon Tester and Representative Greg Gianforte in 2017 to permanently eliminate mining opportunities in these two areas on public lands; and 3) a 20-year mineral withdrawal in 2018 by Secretary of Interior Ryan Zinke.

With Senator Tester and Representative Gianforte’s companion legislative bills – the Yellowstone Gateway Protection Act – working their way through committees in both chamber of congress and awaiting passage, surveyors asked recreation users about their support or opposition to the legislation.

Results of the survey indicate that resident and non-resident recreation users are very supportive of the Yellowstone Gateway Protection Act. Figure 16A shows that 81% of recreation users support the

Yellowstone Gateway Protection Act, 16% are undecided, and 3% oppose. Resident support is even higher with 83% support, 14% undecided and 2% opposed (Figure 16B). When broken down by political ideology, results show that Republicans lend 68% support and 7% opposition (24% undecided) and Democrats give 90% support and 2% opposition (8% undecided). One should, however, approach the results of political ideology related to support for the Yellowstone Gateway Protection Act with some caution as only 30% of the surveyed population responded to reveal his/her political ideological leanings. The other 70% of the surveyed population left this demographic question blank during the survey.

FIGURE 16A. RECREATION USER SUPPORT FOR YELLOWSTONE GATEWAY PROTECTION ACT

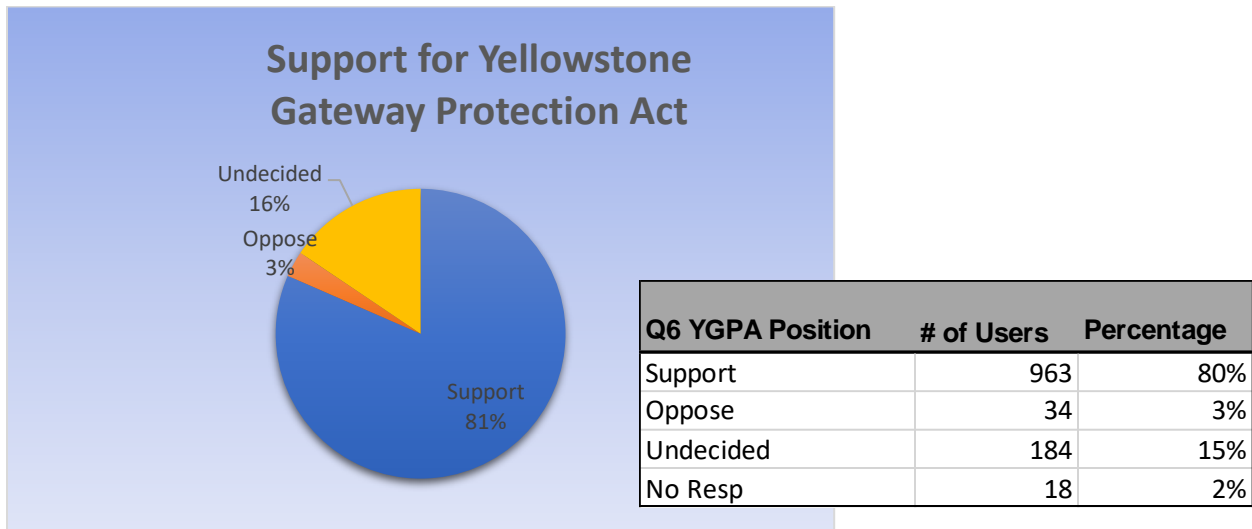
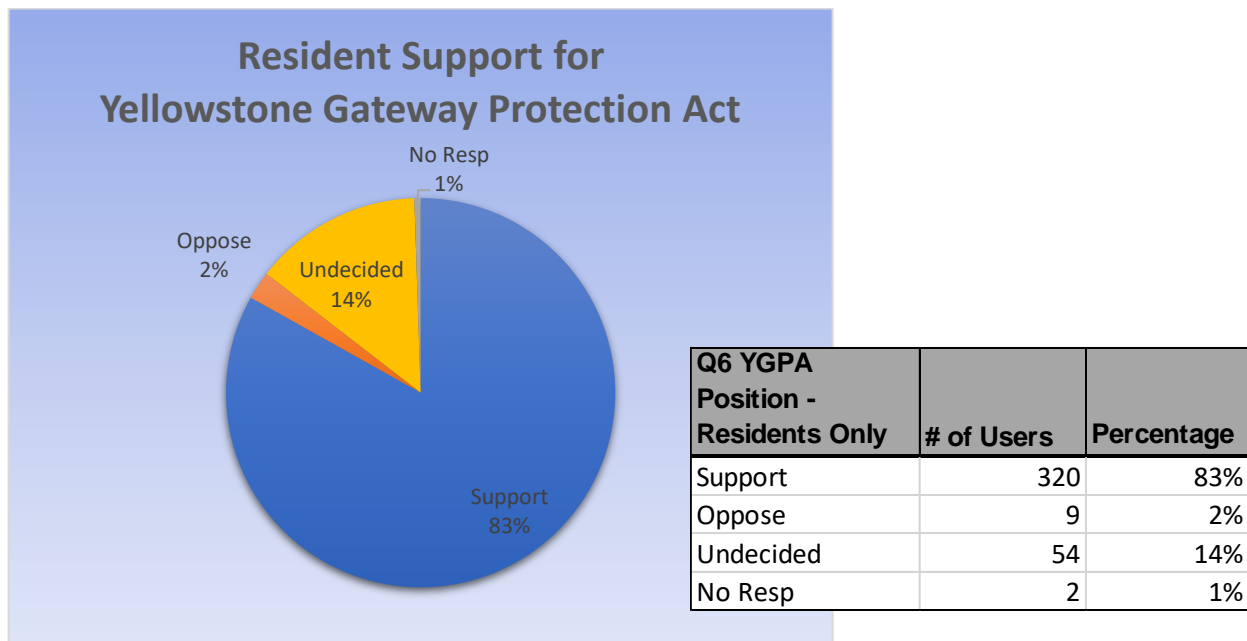


FIGURE 16B. RESIDENT RECREATION USER SUPPORT FOR YELLOWSTONE GATEWAY PROTECTION ACT



IV. RECREATION PREFERENCES & FREQUENCY

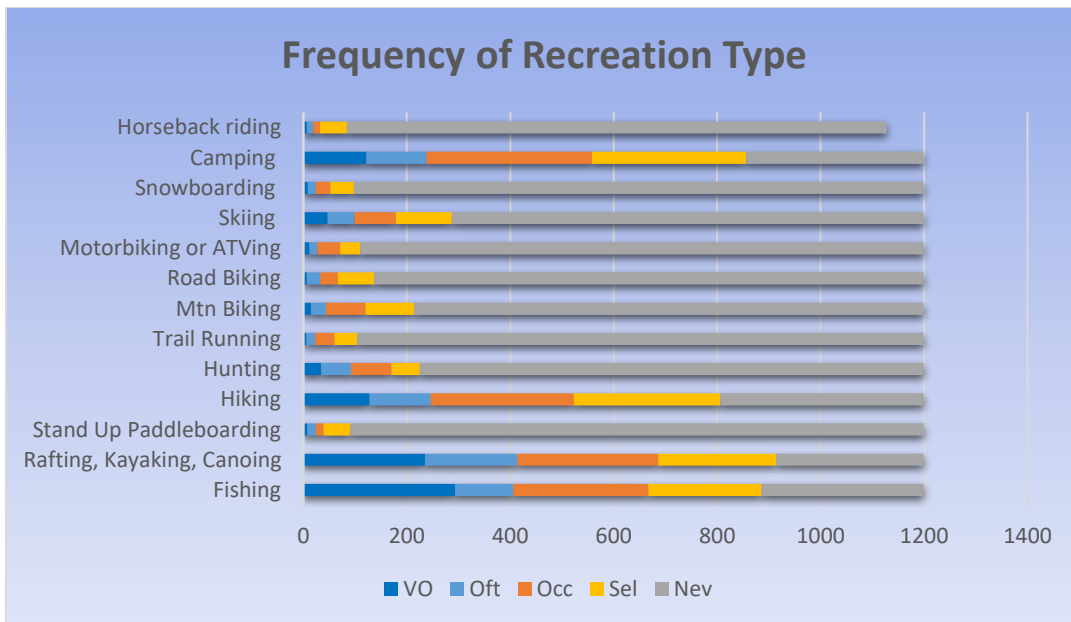
During the survey, recreation users responded to questions about the types of recreation they perform in Park County, as well as the frequency of that recreation throughout a calendar year. Frequency was broken down into five categories per year: Very Often (>20 times); Often (10-20 times); Occasionally (3-9 times); Seldom (1-2 times); and Never (0). The thirteen types of recreation include: fishing, rafting/kayaking/canoeing (combined), stand up paddle boarding, hiking, hunting, trail running, mountain biking, road biking, motorbiking or ATVing, skiing, snowboarding, camping, and horseback riding.

In terms of participation of the thirteen types of recreation, traditional paddling (rafting, kayaking, canoeing) ranked the highest (77% participation), fishing ranked the second highest (73% participation), camping ranked the third highest (71% participation) and hiking ranked the fourth highest (68% participation). Participation in all other forms of recreation was substantially less than hiking. Stand Up Paddle Boarding ranked the lowest in participation (7%).

Surveyors received additional comments from recreation users that they like to rock climb in Park County, particularly at Allen Spur near the Carters Bridge Fishing Access Site. Unfortunately, the survey did not include climbing as a recreation opportunity to quantitatively document in participation amount and frequency. Beer drinking is another topic that came up as a reason why people, particularly locals, spend time at Fishing Access Sites. The survey did not include beer drinking as a recreation opportunity, though it makes sense that some people choose to spend time along the river relaxing and drinking beer.

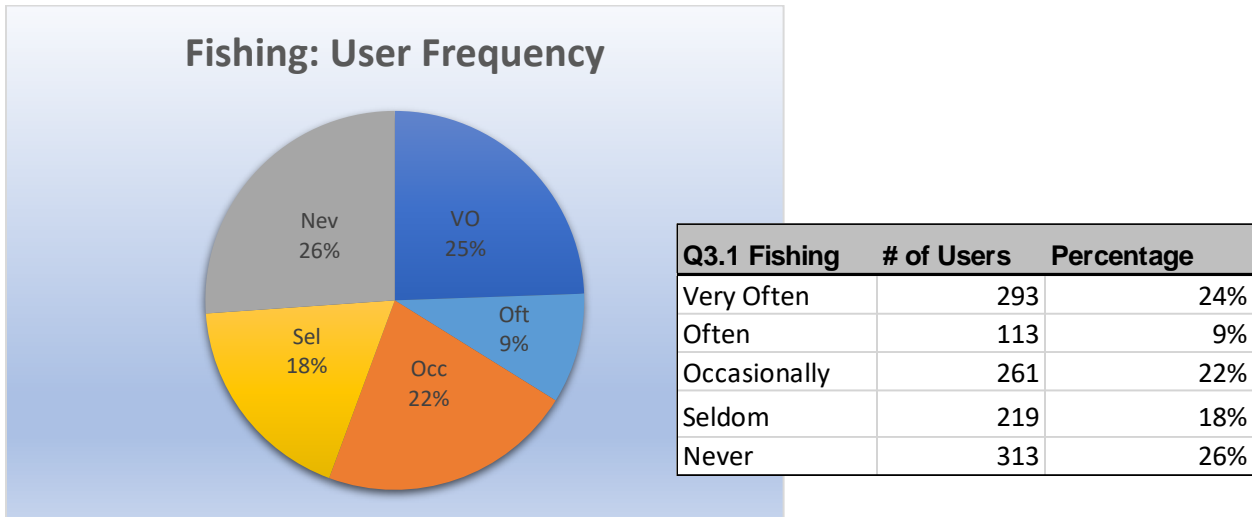
In terms of recreation types that receive high frequency of participation, more recreation users fish very often (>20 times) than paddle very often. In the survey, 293 people fish very often compared to 235 people who raft, kayak or canoe very often. Other frequency categories (often, occasionally, seldom) corresponded with overall participation as noted above.

FIGURE 17. PREFERENCE & FREQUENCY OF RECREATION TYPE



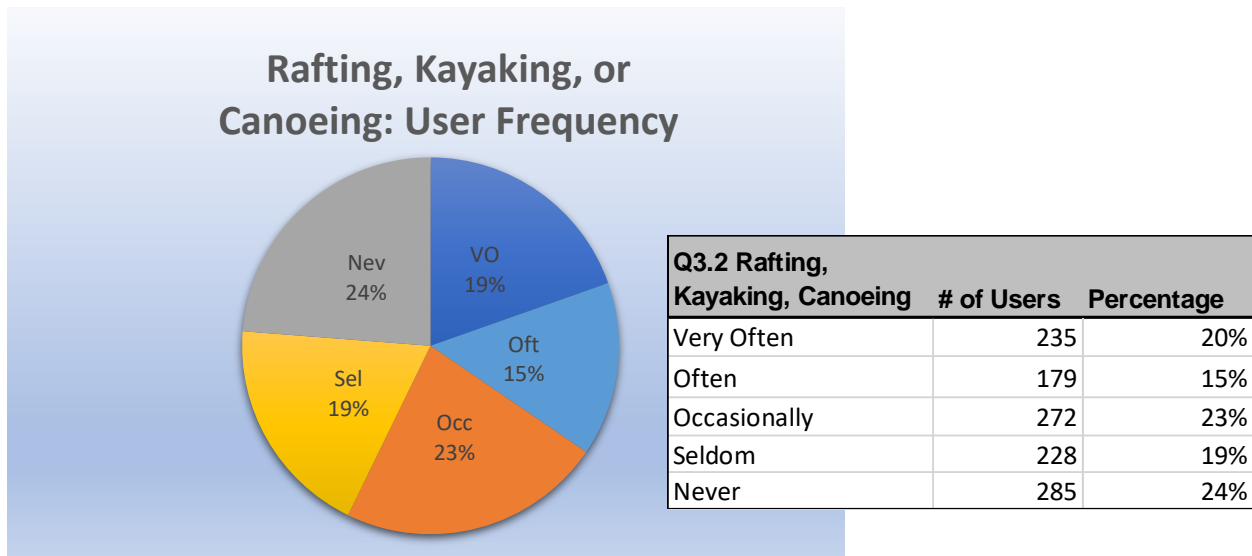
Frequency	Fishing	Rafting, Kayaking, Canoeing	Stand Up Paddleboarding	Hiking	Hunting	Trail Running	Mtn Biking	Road Biking	Motorbiking or ATVing	Skiing	Snowboarding	Camping	Horseback riding
Very Often	293	235	8	128	35	6	15	7	12	47	9	122	7
Often	113	179	16	118	57	17	29	26	15	52	15	116	12
Occasionally	261	272	15	277	78	37	76	34	44	80	28	320	13
Seldom	219	228	52	283	55	44	94	70	39	108	46	298	52
Never	313	285	1108	393	974	1095	985	1062	1089	912	1101	343	1044

FIGURE 18. FISHING - RECREATION USER FREQUENCY



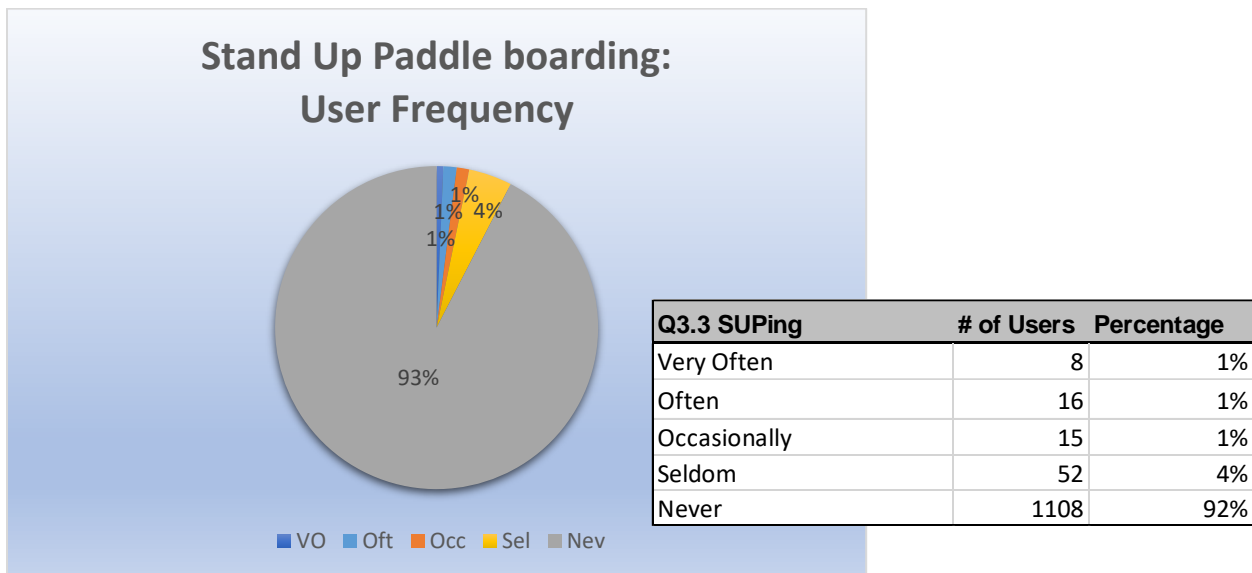
Fly fishing is a very popular sport in Park County, Montana due to the Yellowstone River and its multiple public access points. The Yellowstone River supports hundreds of seasonal fly fishing guides and scores of outfitter businesses and fly fishing shops. People travel from all over the world to fish the Yellowstone River. Aside from the popularity of commercial fly fishing, many Park County residents and residents of other Montana counties fish the river for pleasure. That is why it is no surprise that out of 1,199 people surveyed, 406 people (33%) fish very often or often and 886 (74%) of the recreation population fish at some point throughout the year. Fishing ranked as the second highest recreation activity in Park County.

FIGURE 19. RAFTING, KAYAKING, CANOEING – RECREATION USER FREQUENCY



Rafting, kayaking, canoeing (combined) as traditional paddling was the most preferred type of recreation in Park County, Montana. This category included drift boating. Seventy-six percent (76%) of the surveyed population raft, kayak or canoe at least once in a calendar year. Thirty-five percent (35%) of the surveyed population raft, kayak, or canoe very often (>20 times per year) or often (10-20 times per year).

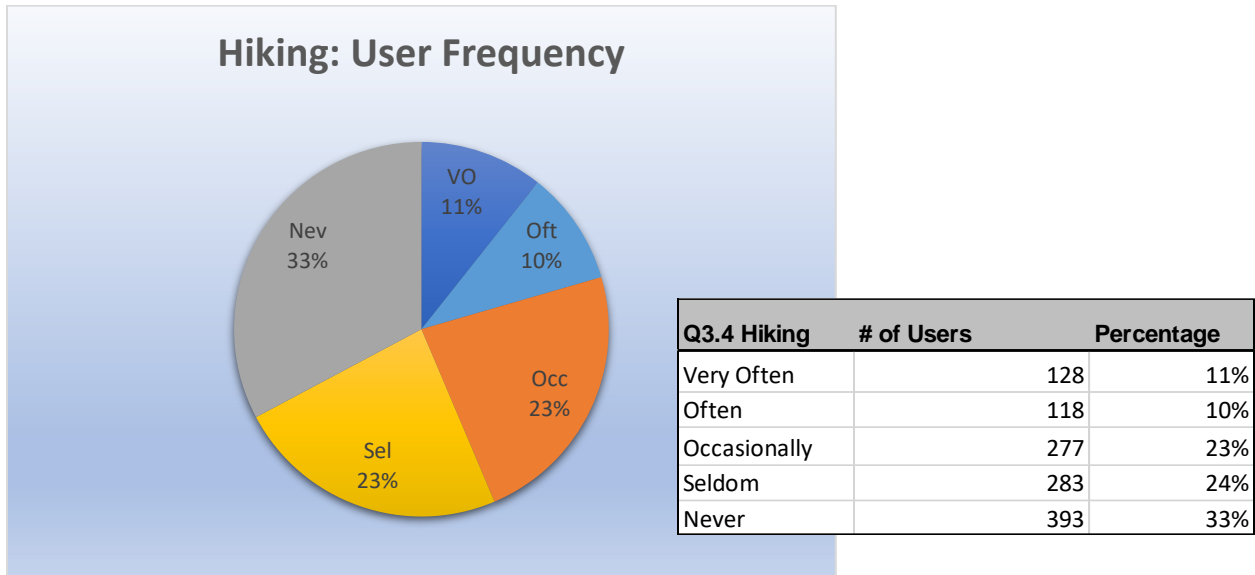
FIGURE 20. STAND UP PADDLE BOARDING – RECREATION USER FREQUENCY



Although Stand Up Paddle boarding is perceived as a growing water sport across the United States, it is still not very popular in Park County, Montana. In fact, it ranks as the least performed type of recreation out of thirteen recreation types explored in this survey. Only 7% of the surveyed population SUP (Stand Up Paddle board). The common places for doing this are on the Yellowstone River and at Daily Lake.

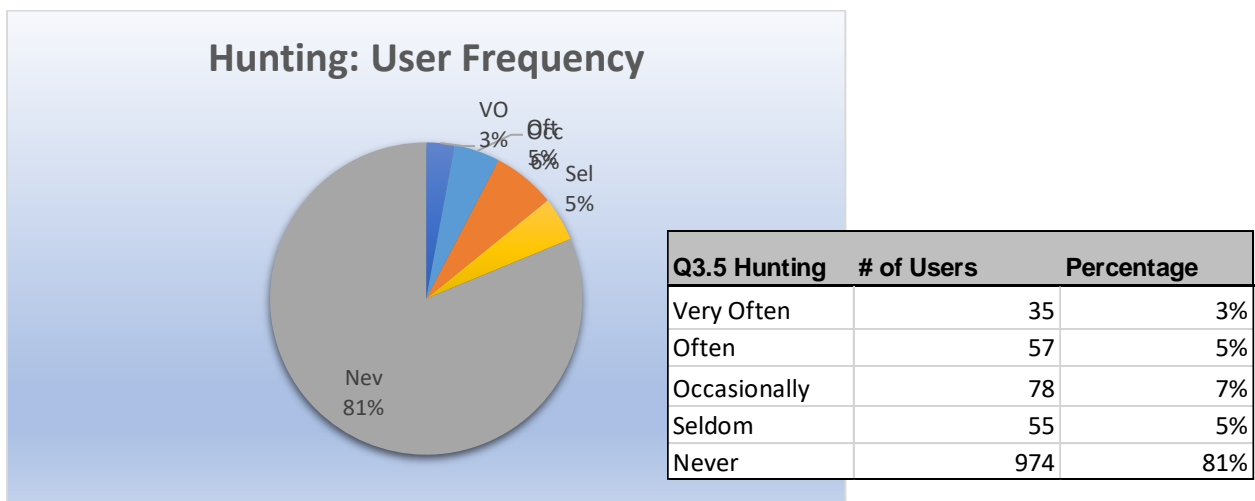
Only 2% of the population said they SUP very often or often, representing a combined 24 people out of 1,199 in the entire survey.

FIGURE 21. HIKING – RECREATION USER FREQUENCY



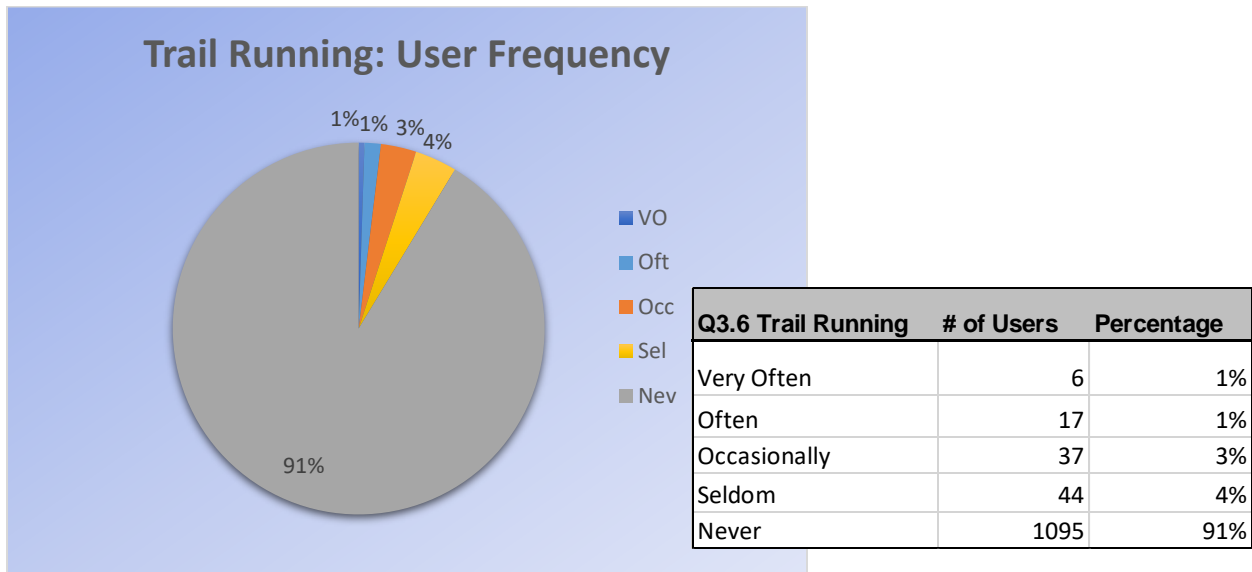
Hiking is the fourth most common preferred form of recreation in Park County based on survey results. Roughly two-thirds (67%) of recreation users hike at some point in the year in Park County, Montana. Twenty-one percent (21%) of the surveyed population hike very often (>20 times per year) or often (10-20 times per year). These results should not come as a surprise due to the excellent numerous trailheads to public lands that Park County residents have to choose from. With the Absaroka Range, Gallatin Range, Beartooth Range, and Crazy Mountains, people who choose to recreate in Park County are surrounded by world class hiking in all directions.

FIGURE 22. HUNTING – RECREATION USER FREQUENCY



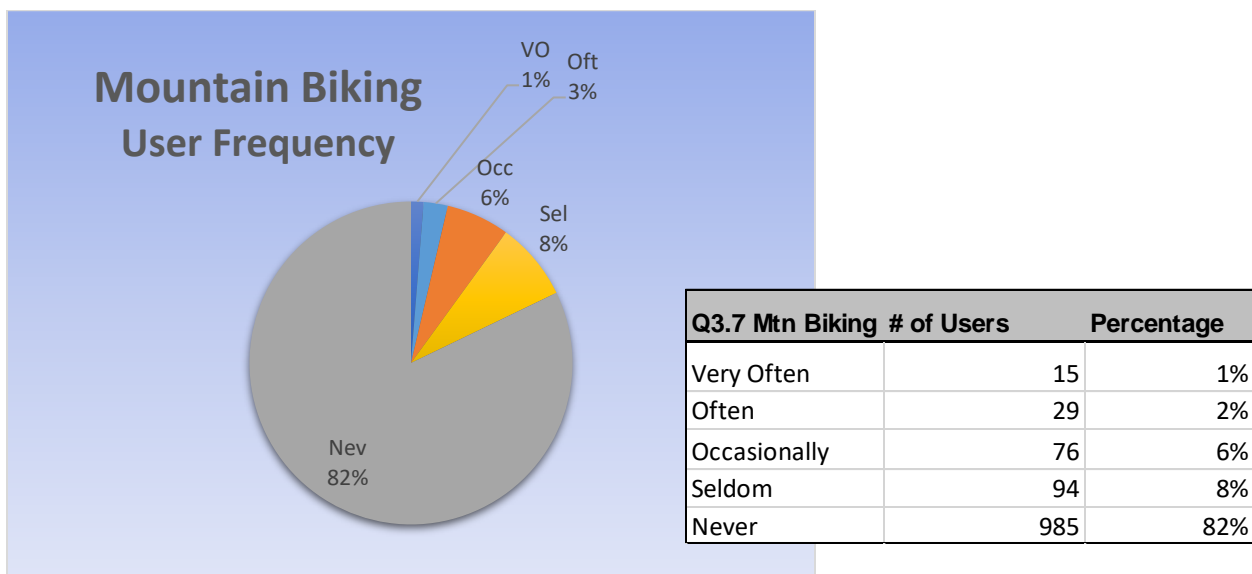
Only 19% of 1,199 people surveyed hunt in Park County. This relatively low percentage is likely due to the fact that roughly two-thirds of the surveyed population are not Park County residents. The number may also be relatively low because some of the best hunting in Park County is on private lands, which takes a good relationship and permission from a private land holder for access. This opportunity would likely be more accessible to Park County residents.

FIGURE 23. TRAIL RUNNING – RECREATION USER FREQUENCY



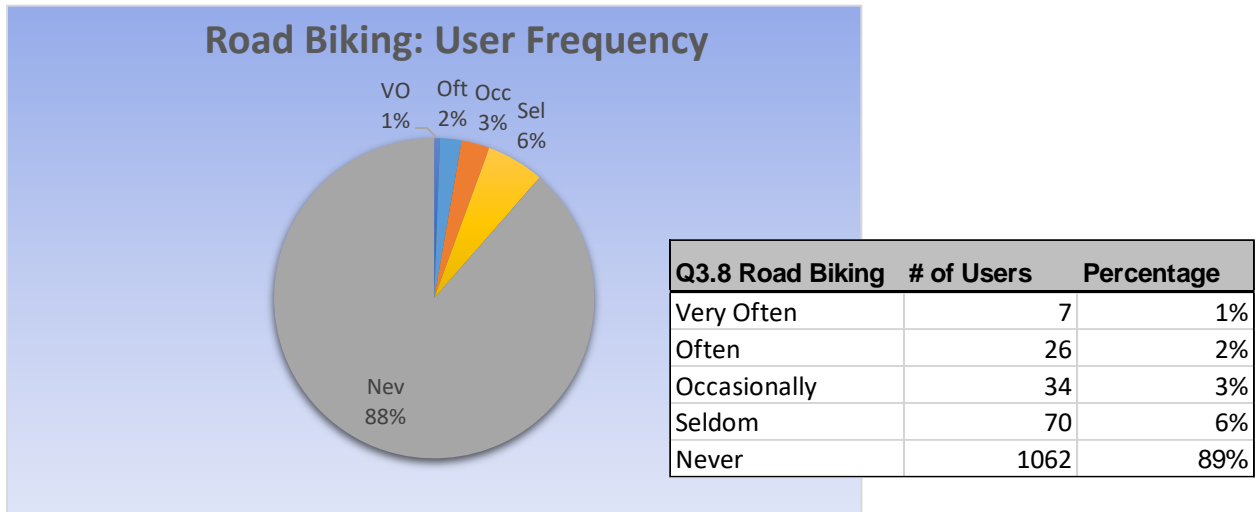
Trail running ranked very low as a recreation preference for recreation users in the survey. Only 9% of 1,199 recreation users choose to trail run in Park County.

FIGURE 24. MOUNTAIN BIKING – RECREATION USER FREQUENCY



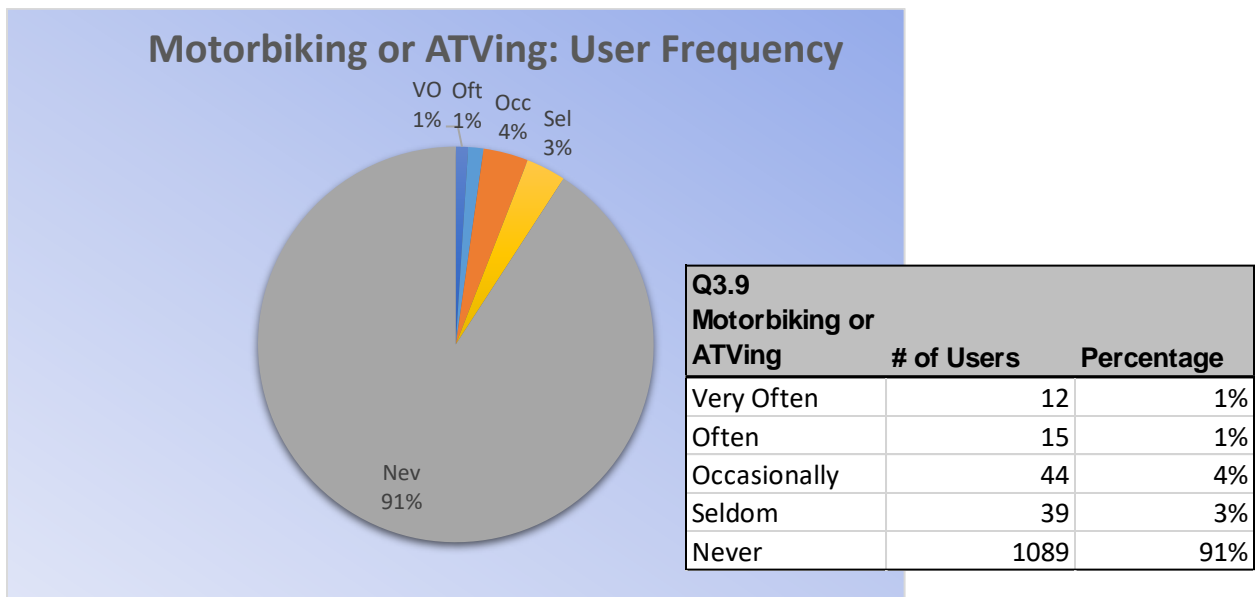
Only 18% of recreation users choose to mountain bike in Park County. In terms of frequency, the largest segment of mountain bikers ride just a couple times per year.

FIGURE 25. ROAD BIKING – RECREATION USER FREQUENCY



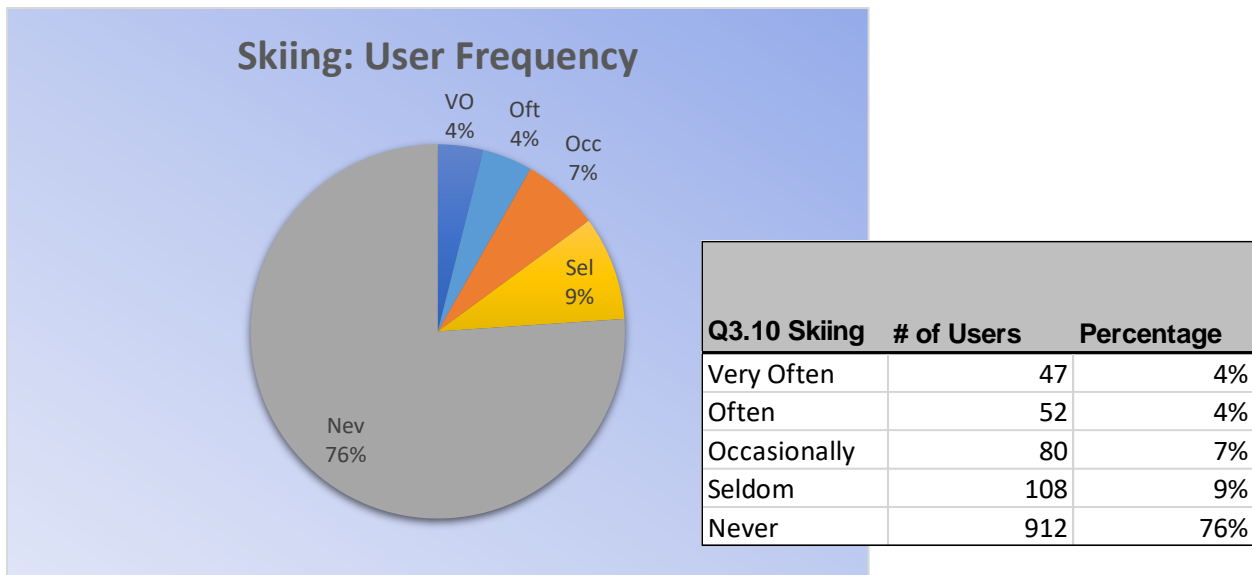
Road biking is less popular than mountain biking in Park County, Montana. Only 12% of the 1,199 recreation users surveyed say they road bike at least one time per year. In terms of frequency, the largest segment of road bikers ride just a couple times per year.

FIGURE 26. MOTORBIKING OR ATVING – RECREATION USER FREQUENCY



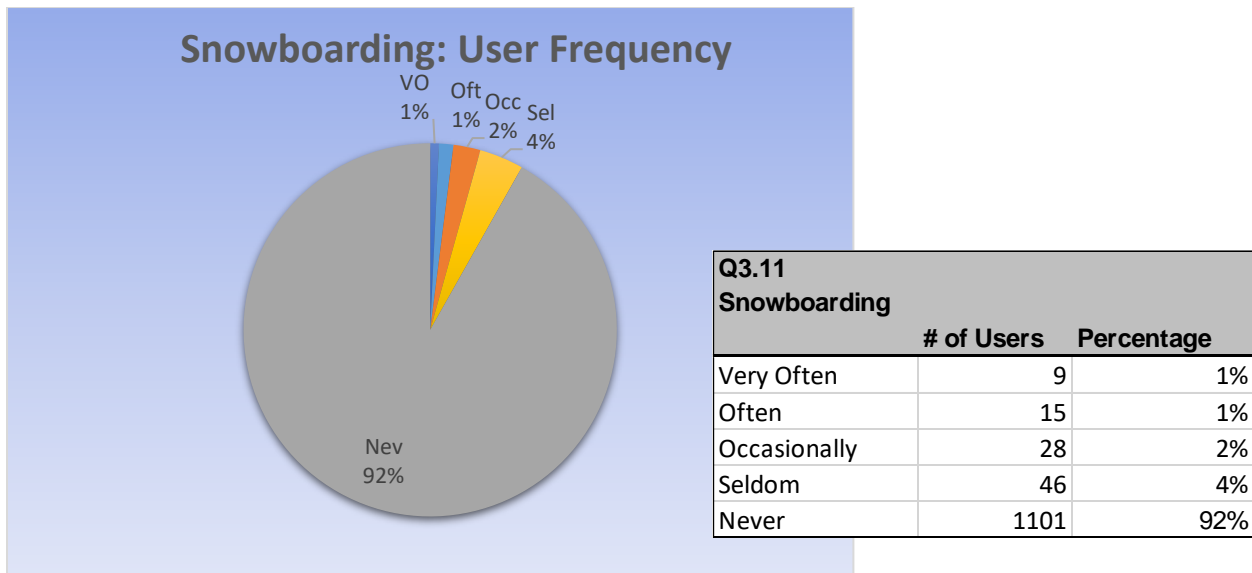
Motorbiking or ATVing ranked very low as a preferred recreation type by recreation users in the survey. Only 9% of 1,199 recreation users surveyed say they ride a motorbike or ATV at least once a year.

FIGURE 27. SKIING – RECREATION USER FREQUENCY



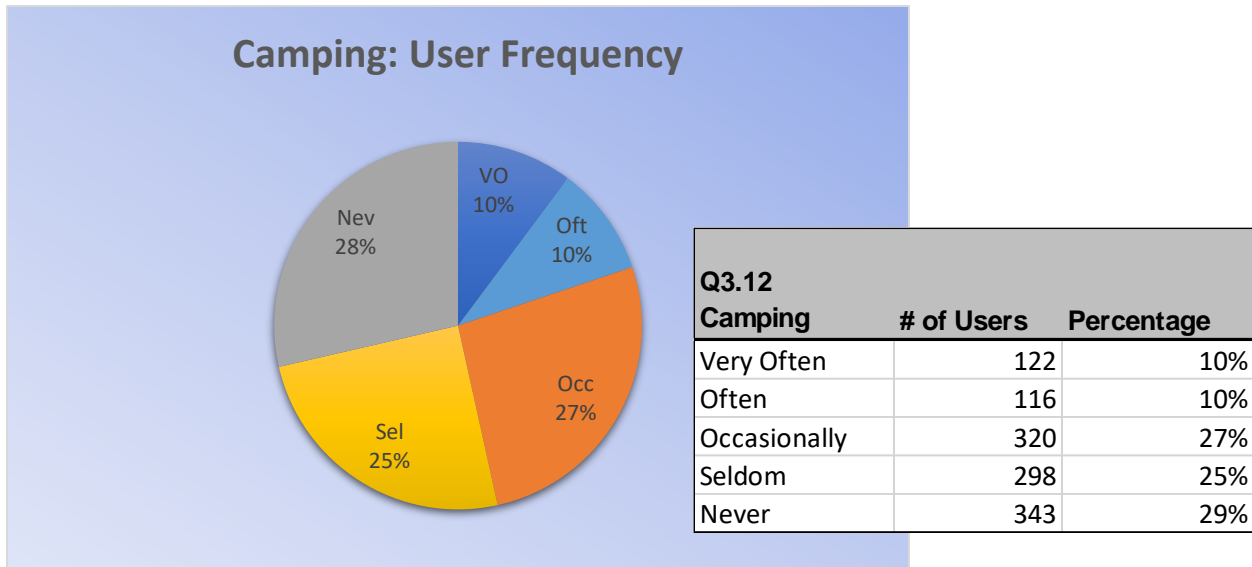
Skiing received moderate interest as a recreation type. Twenty-four percent (24%) of recreation users in Park County ski in Park County. Because Park County, Montana does not have an operating downhill ski area (Bridger Bowl is in Gallatin County and Showdown is in Meagher County), this question was directed to people who cross-country ski or backcountry ski.

FIGURE 28. SNOWBOARDING – RECREATION USER FREQUENCY



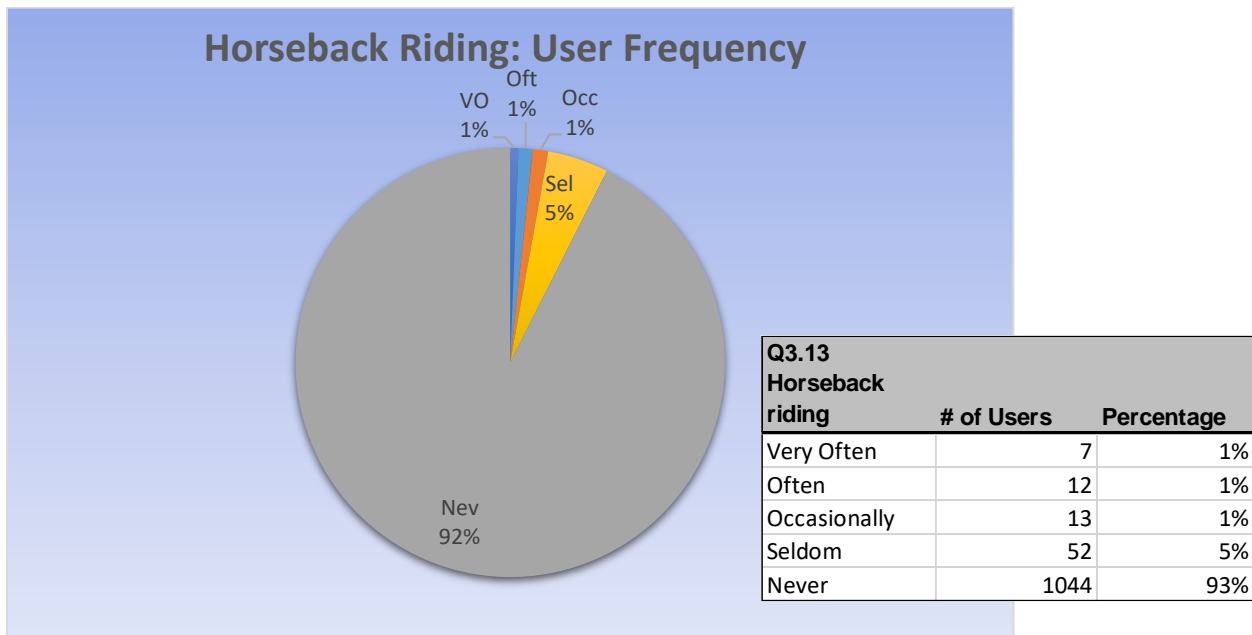
Snowboarding received low interest among recreation users in the survey. Only 8% of recreation users snowboard in Park County. Because Park County, Montana does not have an operating downhill ski area (Bridger Bowl is in Gallatin County and Showdown is in Meagher County), this question was directed to people who backcountry ride, using either snowshoes or a split-board to climb, and a snowboard to descend.

FIGURE 29. CAMPING – RECREATION USER FREQUENCY



Camping is the third most popular form of recreation in Park County, Montana. Seventy-two percent (72%) of recreation users in Park County camp at least one day per year. The largest frequency segment of campers is those who camp 3 – 9 times per year (27% of the surveyed population). With numerous Forest Service, Bureau of Land Management, Montana Fishing Access Sites, and dispersed camping opportunities, it is no surprise that camping ranked high as a form of recreation in Park County.

FIGURE 30. HORSEBACK RIDING – RECREATION USER FREQUENCY



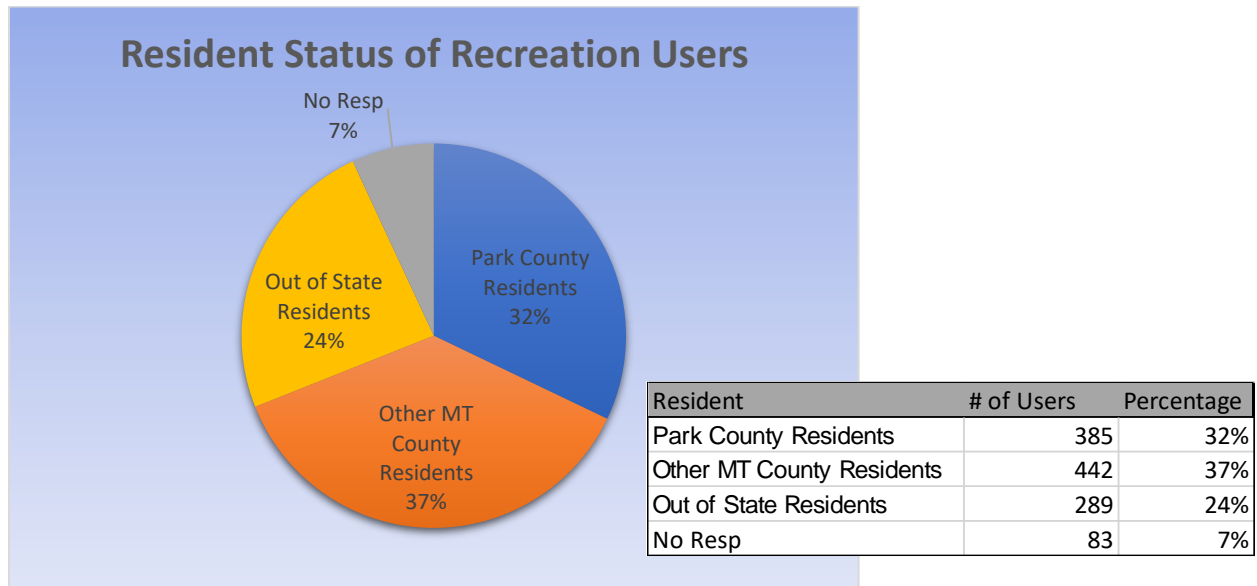
Horseback riding ranked very low as a recreation use in Park County, Montana. Only 8% of the surveyed population choose to ride a horse at least once per year. The largest frequency segment of horseback

V. DEMOGRAPHICS

Greater Yellowstone Coalition surveyors asked questions regarding residence, age, sex and political ideology to better understand demographics of recreation users.

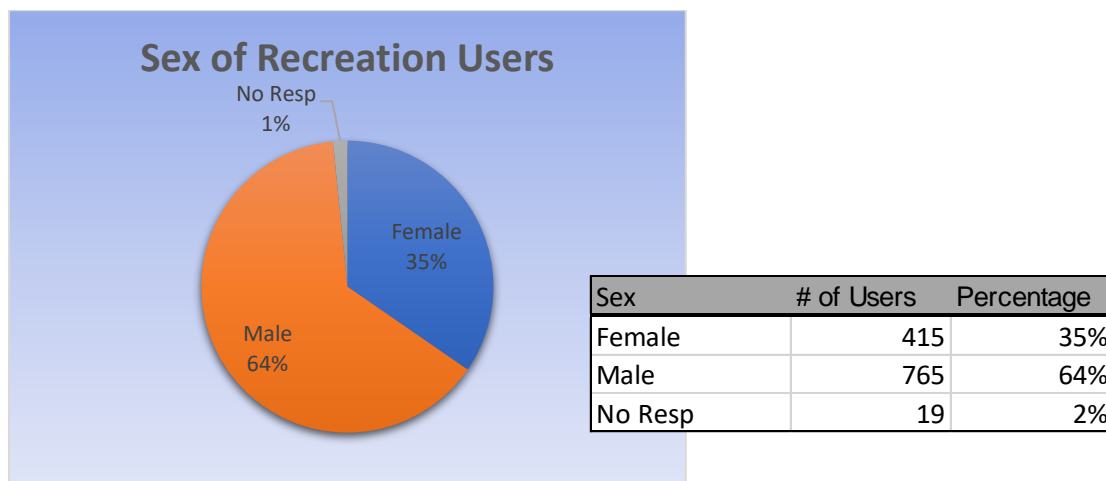
Residence: Out of 1,199 people surveyed, 385 people (32%) are residents of Park County and 795 people (66%) are not residents of Park County. Of the 795 non-Park county residents, 442 (37% of the 1,199 total) are residents of other Montana Counties and 289 (36%) are from out of state. 83 people (7%) did not respond.

FIGURE 32. RESIDENT STATUS OF RECREATION USERS



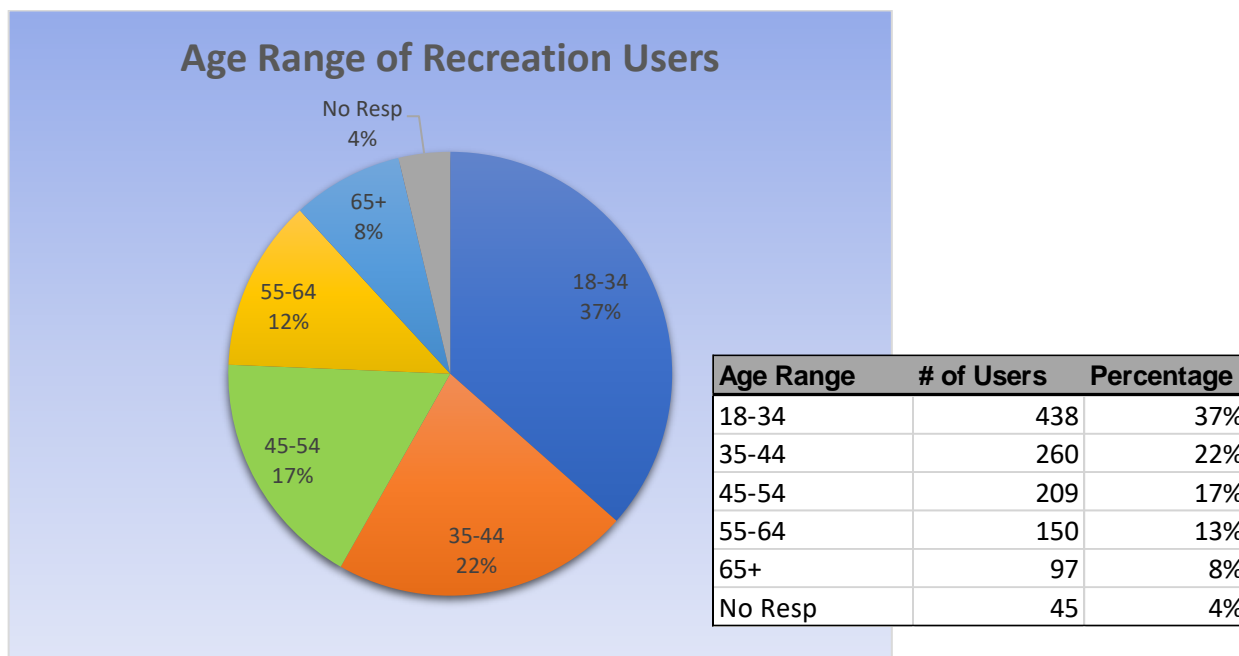
Sex: Out of 1,199 people surveyed, 415 recreation users (35%) were female and 765 recreation users (64%) were male. Nineteen people (2%) did not respond.

FIGURE 33. SEX OF RECREATION USERS



Age: Age range varied considerably among recreation users of the upper Yellowstone gateway corridor. The largest user group is age 18-34, representing 34% of the surveyed population. Recreation users aged 35-44 represent 22% of the population; recreation users age 45-54 represent 17% of the population; recreation users age 55-64 represent 13% of the population and people 65 and older represent 8% of recreation users surveyed.

FIGURE 34. AGE RANGE OF RECREATION USERS



CONCLUSIONS & RECOMENDATIONS

The outdoor recreation industry is a large and important sector of Park County’s economy. Based on the Institute for Tourism and Recreation Research, roughly one million non-residents travel through Park County, Montana each year. That number dwarfs the mere 16,000 residents who call Park County home. According to the Institute for Tourism and Recreation Research, Montanans like to travel and vacation within their own state; and Park County is a benefactor of in-state tourism as well.

While outdoor recreation is a benefit to the Park County economy, large hordes of people traveling and recreating in the area can also be a burden on the natural resources, county transportation infrastructure, and emergency services. Results from the Greater Yellowstone Coalition’s recreation user survey provide clarity on preferences to fund conservation if given the opportunity to implement a regional resort tax along the Yellowstone Gateway corridor. There is also irrefutable support for congressional legislation to protect the Yellowstone River and its headwaters by using the Wild & Scenic Rivers Act and Yellowstone Gateway Protection Act.

Park County residents and non-resident recreation users are most supportive of funding projects to: 1) protect water quality of streams and rivers (98% described as extremely/very Important); 2) conserve fish and wildlife habitat (96% described as extremely/very Important); and 3) protect open space (92% described as extremely/very Important). While funding water quality, fish and wildlife habitat, and open space ranked the highest in support, there is still strong support to use resort tax dollars to fund the maintenance and upgrade of county roads (65% described as extremely/very Important). Recreation user preferences indicate that in the future, if given the opportunity to implement a regional resort tax, it will be important to create a resort tax charter that addresses funding allocations for both natural resource conservation and county infrastructure needs.

Since results from the recreation user survey show that 86% of recreation users support protecting the upper Yellowstone River from Gardiner to Carbella Fishing Access Site as a National Wild & Scenic River, and 81% support of recreation users support protecting the headwaters of the Yellowstone River from gold mining with the Yellowstone Gateway Protection Act, it is clear that Montana's U.S Congressional delegation has significant public support to introduce and pass both forms of legislation.

APPENDIX A

PARK COUNTY SURVEY ON RECREATION USER VALUES

Introduction: Hi, my name is _____, I'm here asking people questions about their recreation experience. Would you mind taking three to four minutes to answer a few questions?

Q1. Could you begin by telling me why you choose to recreate in Park County, Montana?

RECORD QUALITATIVE COMMENTS VERBATIM. DIG DEEPER INTO THE STORY AS NECESSARY: Why Here? What would your life be without this opportunity?

Q2. Could you provide me an example of one of your favorite memories of recreating here?

RECORD QUALITATIVE COMMENTS VERBATIM. DIG DEEPER AS NECESSARY.

Q3. For each type of recreation, please tell me roughly how many times per year you do this in Park County. **(Do Not Read Categories. Record Number)**

Very Often (>20) Often (10-20) Occasionally (3-9) Seldom (1-2)
Never

3.1 FISHING

3.2 RAFTING, KAYAKING OR CANOING

3.3 STAND UP PADDLEBOARDING

3.4 HIKING

3.5 HUNTING

3.6 TRAIL RUNNING

3.7 MOUNTAIN BIKING

3.8 ROAD BIKING

3.9 MOTORBIKING OR ATV-ING

3.10 SKIING (EITHER CROSSCOUNTRY OR BACKCOUNTRY)

3.11 SNOWMOBILING

3.12 CAMPING

3.13 HORSEBACK RIDING

Q4. Next, I am going to read you some specific types of projects that are being considered as part of an AGRICULTURE, RECREATION AND CONSERVATION FUND in Park County. Some of which COULD be funded by a future resort region tax. For each one, please tell me how important it is to you that funds be included for that specific purpose. Use a scale of 1-4; 4 being extremely important, 3 being very important, 2 being somewhat important and 1 being not that important.

An Agriculture Recreation Conservation Fund could support.... **(RANDOMIZE STATEMENTS)**

Extremely Very Somewhat Not That Important

- 4.1. Protecting water quality of streams and rivers
- 4.2. Conserving fish and wildlife habitat
- 4.3. Maintaining or upgrading county roads
- 4.4. Conserving family farms, ranch lands and local food production
- 4.5. Conserving open space and scenic views
- 4.6. Protecting the rural character of our county
- 4.7. Conserving lands that are threatened by development
- 4.8. Managing noxious weeds
- 4.9. Extending, connecting and maintaining trails for hiking, walking and biking
- 4.10. Maintaining or enhancing fishing access sites and stream gauges
- 4.11. Purchasing lands for fishing, hunting and recreation access
- 4.12. Purchasing lands for wildlife habitat
- 4.13. Maintaining our quality of life

Q5. Changing subjects, the Wild and Scenic Rivers Act was established in 1968 to protect America's iconic rivers and streams. The Act prevents new dams and other projects that could impact the remarkable values of a river like scenery, recreation, fish and wildlife. Would you support or oppose seeing the upper Yellowstone River from Gardiner through Yankee Jim Canyon designated as a Wild and Scenic River? **(RECORD: SUPPORT, OPPOSE, UNDECIDED)**

IF UNDECIDED: WHAT IS ON EITHER SIDE OF THE ISSUE FOR YOU?

Q6. There are currently two proposed gold mines in the headwaters of the Yellowstone River on Emigrant Peak and Crevice Mountain. Emigrant Peak is near the center of Paradise Valley; Crevice Mountain is immediately adjacent to Yellowstone National Park. The Yellowstone Gateway Protection Act, if passed in Congress, would permanently prohibit mineral development on public lands around these two proposed mines. Do you support or oppose this legislation? (**RECORD: SUPPORT, OPPOSE, UNDECIDED**)

IF UNDECIDED: WHAT IS ON EITHER SIDE OF THE ISSUE FOR YOU?

Now, I have just a few more questions for statistical purposes only...

D1. Can I have your first and last name?

D2. Would you mind sharing your birth date? (**Do Not Read Categories**)

1984 - 2000 = 18- 34 years old

1974 - 1983 = 35 – 44 years old

1964 - 1973 = 45 – 54 years old

1954 - 1963 = 55 – 64 years old

1953 or earlier = 65 AND ABOVE

- REFUSED

D3. Are you a resident or non-resident of Park County?

RESIDENT

NON-RESIDENT

D4. **IF RESIDENT:** How long have you lived in Park County? (**DO NOT READ CHOICES**)

LESS THAN FIVE YEARS

FIVE TO NINE YEARS

TEN TO FIFTEEN YEARS

MORE THAN FIFTEEN YEARS

NATIVE/BORN HERE

-- DON'T KNOW (**DO NOT READ**)

-- REFUSED (**DO NOT READ**)

IF NON-RESIDENT: Are you a resident of another county in Montana? How many years have you been traveling to Park County? (**DO NOT READ CHOICES**)

FIRST TIME

TWO TO FOUR YEARS

FIVE TO NINE YEARS

TEN TO FIFTEEN YEARS

MORE THAN FIFTEEN YEARS

D5.1. And, in politics today, do you consider yourself to be... (**ROTATE**)

a Republican,

a Democrat,

an Independent, or something else?

D5.2 (**IF REPUBLICAN OR DEMOCRAT, ASK**) Would you call yourself a STRONG (**Republican/Democrat**) or a NOT-SO-STRONG (**Republican/Democrat**)?

D6. Would you be interested to share your phone number and email so that I could keep you abreast on issues regarding an agriculture, recreation and conservation fund in Park County?

YES OR NO. IF YES, RECORD CONTACT INFORMATION.

D7. Sex (**BY OBSERVATION**)

MALE

FEMALE

CONCLUSION: THANK YOU FOR YOUR TIME TODAY!

APPENDIX B

**Economic Analysis of a Potential Regional Resort Tax Along the Upper Yellowstone River Corridor.
Greater Yellowstone Coalition. 2018.**

\$23,417,000 - MT resident day trips to Park County (2017)*

\$27,277,000 - MT resident overnight trips to Park County (2017)*

\$185,800,000 – Non-resident travel to Park County (2017)*

\$236,494,000 – Total combined travel to Park County (2017)*

*from Institute for Tourism and Recreation Research

Potential Tourist Tax Generations in Park County if applied to total combined travel revenue:

(Based on a potential year-round tourist tax on \$236,494,000 as total travel revenue when calculated revenue includes fuel and groceries)

1% = \$2,364,940

2% = \$4,729,880

3% = \$7,094,820

4% = \$9,459,760

Resident/non-resident numbers are based on reports made and released by Institute for Tourism and Recreation Research in 2018. These numbers reflect Park County wide. To account for a narrower proposed regional resort tax district (Livingston to the north Gardiner Basin), it is necessary to cut current resort tax figures from Cooke City and Gardiner. We can assume with strong confidence that the Shields Valley of Park County does not account for considerable resident or non-resident travel spending.

FY 2015 Resort Tax Revenue

\$150,000 – Cooke City

\$350,000 – Gardiner

\$2,205,563 – Whitefish

\$1,710,600 – West Yellowstone

During 2015, resort tax revenues in Whitefish were over \$2.2 million (See Table 5). Of that total, 18 percent came from motels; 37 percent came from restaurants and bars; and 45 percent from retail.

FY 2017 Resort Tax Revenue

\$213,654 – Cooke City

\$614,993 – Gardiner

\$3,860,000 – Whitefish

\$828,647 – combined Cooke City and Gardiner

Adjusted Potential Regional Resort Tax Income for Yellowstone Gateway

Statewide, resident travelers in 2017 spent 40% of their expenses on fuel (\$766,140,000) and groceries – fuel and groceries are unlikely to be taxable items included as part of a new resort tax.

\$766,140,000 – Total Fuel

\$378,994,000 – Total Groceries

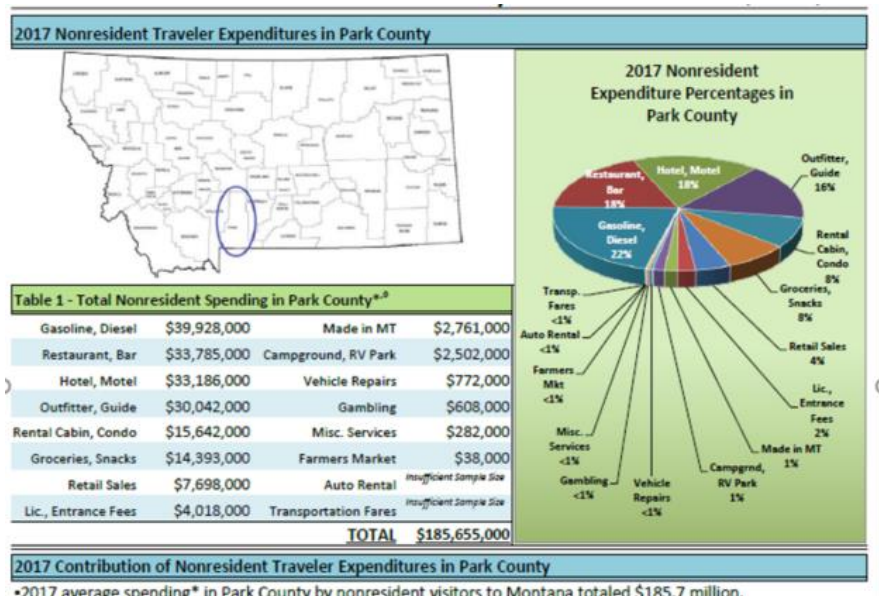
\$2,869,590,000 – Total Spending

Meanwhile, research shows that non-resident travelers in Park County in 2017 spent \$54,321,000 on fuel and groceries (combined), or 29% of total non-resident expenditures.

Table 4: 2017 trip spending per category by day and overnight travelers

Category	Day Trips	Overnight Trips
Fuel	\$492,343,000	\$273,797,000
Lodging, Camping	\$0	\$188,244,000
Restaurants, bars	\$288,990,000	\$371,494,000
Groceries	\$262,342,000	\$116,652,000
Retail goods	\$474,849,000	\$184,793,000
Service (fees, admissions, etc.)	\$144,093,000	\$71,990,000
Total trip spending =	\$1,662,620,000	\$1,206,970,000

A more accurate number to work with for evaluating potential regional resort tax revenue along the Yellowstone Gateway Corridor (Livingston to Northern Gardiner Basin) should take the total 2017 non-resident and resident travel revenue of Park County (\$236,494,000) and subtract Cooke City’s resort tax revenue (\$213,654) and Gardiner’s resort tax revenue (\$614,993) as well as non-



resident fuel and groceries (\$54,321,000), as well as resident fuel and grocery revenue from day and overnight trips (\$20,276,800). To accommodate for resident travel expenditures on fuel and groceries (which is on average 40% of expenditures statewide), calculations must subtract 40% of \$23,417,000 (MT resident day trips to Park County) and 40% of \$27,277,000 (MT resident overnight trips to Park County). This equates to \$9,366,800 (fuel and groceries subtracted from day trip revenue) and \$10,910,000 (fuel and groceries subtracted from overnight revenue) for a combined total of \$20,276,800.

\$236,494,000	Non-resident and resident travel revenue of Park County (combined)
-\$54,321,000	Non-resident fuel and grocery revenue
-\$9,366,800	Resident day trip fuel and grocery revenue
-\$10,910,000	Resident overnight trip fuel and grocery revenue
-\$213,654	Cooke City resort tax revenue
-\$614,993	Gardiner resort tax revenue
\$161,067,553	Adjusted taxable revenue for (proposed) Yellowstone Gateway Resort Region Tax

Scenarios for Resort Tax Revenue from Adjusted Taxable Revenue \$161,067,553

- 1% = \$1,610,675
- 2% = \$3,221,351
- 3% = \$4,832,026
- 4% = \$6,442,702

APPENDIX C

10-2018

2017 Economic Contribution of Nonresident Travel Spending in Montana Regions and Counties

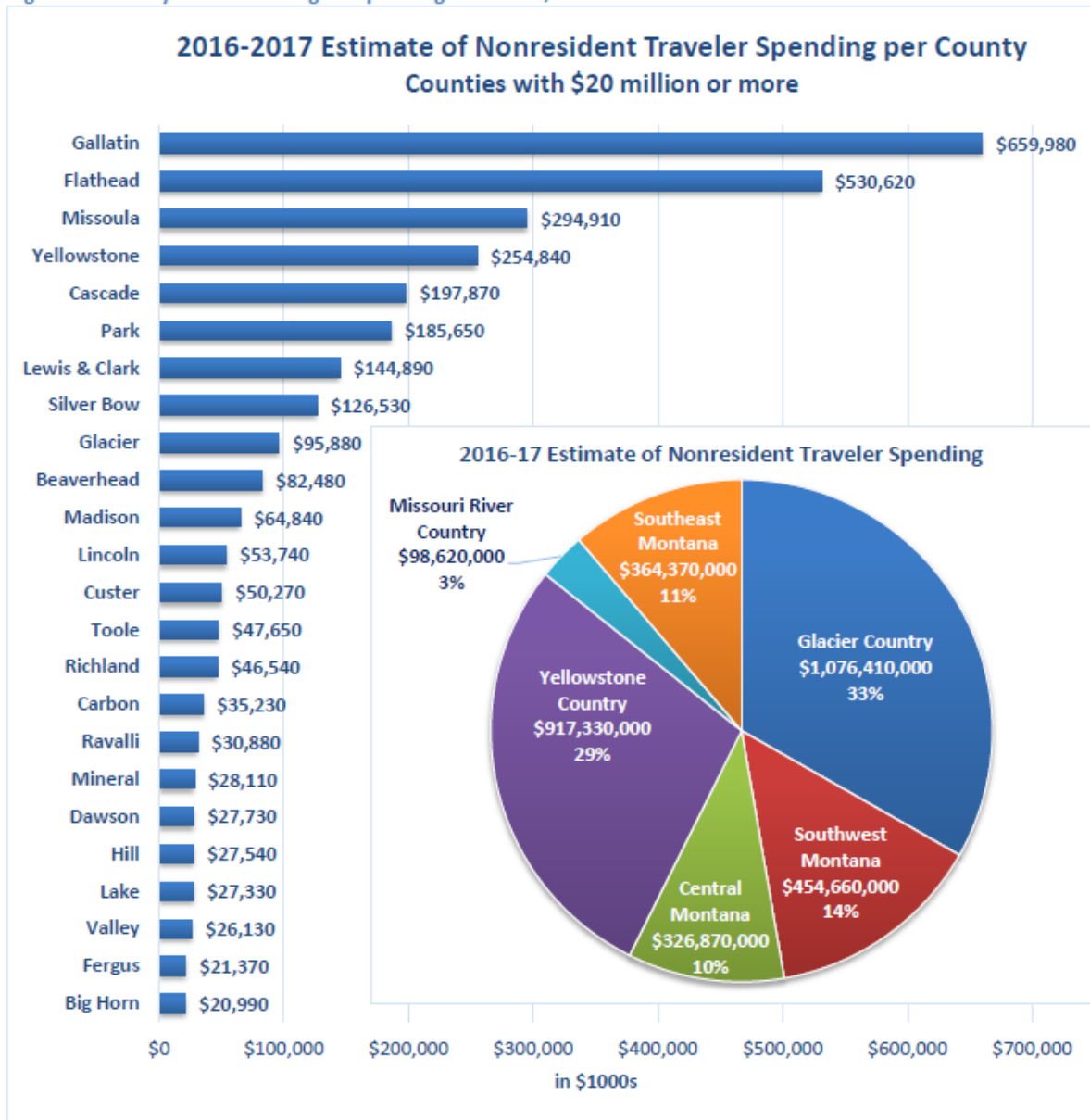
Kara Grau

From: Executive summary

Nonresident travelers spent \$3.24 billion throughout Montana during 2017 (estimate is an average of 2016 and 2017 nonresident spending). This was an increase (2.6%) from the previous year's spending estimate of \$3.16 billion (2015-2016 average).

- Glacier and Yellowstone travel regions received the highest percentage of nonresident spending, 33 and 29 percent, respectively.
- Of the 56 counties in Montana, Gallatin (\$660 million) and Flathead (\$531 million) Counties had the highest amount of spending.
- Fourteen counties had high enough nonresident traveler spending (~\$50 million or greater) to allow for an economic impact analysis, the results of which are presented in the report.

Figure 1 - County and Travel Region Spending Estimates, 2017



2017 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone Country Travel Region

by Kara Grau, M.S.

2017 Nonresident Traveler Expenditures in Yellowstone Country Travel Region



**2017 Nonresident
Expenditure Percentages in
Yellowstone Country Travel Region**

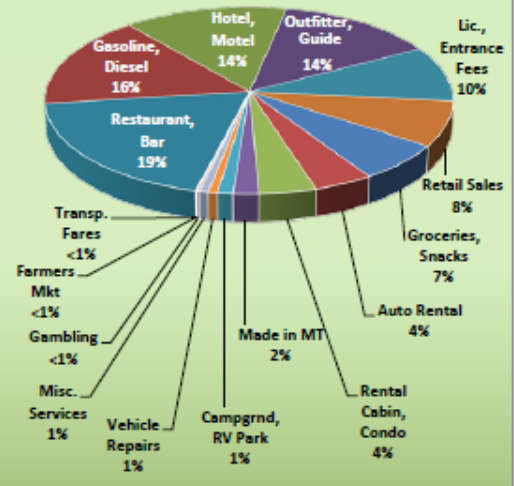


Table 1 - Total Nonresident Spending in Yellowstone Country*^{1,2}

Restaurant, Bar	\$174,895,000	Rental Cabin, Condo	\$38,183,000
Gasoline, Diesel	\$147,584,000	Made in MT	\$16,768,000
Hotel, Motel	\$129,727,000	Campground, RV Park	\$10,169,000
Outfitter, Guide	\$126,541,000	Vehicle Repairs	\$6,149,000
Lic., Entrance Fees	\$88,501,000	Misc. Services	\$5,674,000
Retail Sales	\$71,070,000	Gambling	\$1,678,000
Groceries, Snacks	\$59,797,000	Transportation Fares	\$638,000
Auto Rental	\$39,327,000	Farmers Market	\$634,000
TOTAL		\$917,335,000	

2017 Contribution of Nonresident Traveler Expenditures in Yellowstone Country Travel Region

- 2017 average spending* in Yellowstone Country by nonresident visitors to Montana totaled \$917.3 million.
- This \$917.3 million in local spending directly supports \$717.5 million of economic activity in the region, and supports an additional \$440.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.2 billion.

Table 2 - 2017 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$717,539,000	\$224,843,000	\$215,916,000	\$1,158,298,000
Employment (# of jobs)	11,640	1,760	1,860	15,260
Employee Compensation	\$260,333,000	\$49,343,000	\$55,991,000	\$365,667,000
Proprietor Income	\$21,949,000	\$12,488,000	\$9,777,000	\$44,214,000
Other Property Type Income	\$72,206,000	\$50,689,000	\$43,630,000	\$166,525,000
State & Local Taxes [^]	-	-	-	\$51,102,000

2017 Nonresident Traveler Expenditures & Economic Contribution in Park County

by Kara Grau, M.S.

2017 Nonresident Traveler Expenditures in Park County

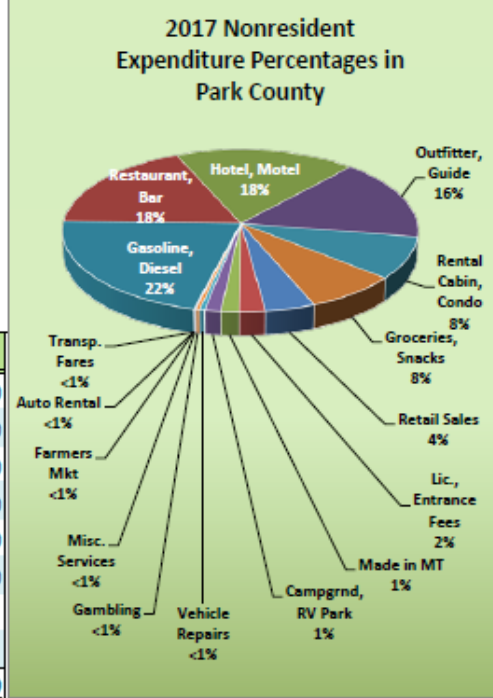


Table 1 - Total Nonresident Spending in Park County*⁰

Gasoline, Diesel	\$39,928,000	Made in MT	\$2,761,000
Restaurant, Bar	\$33,785,000	Campground, RV Park	\$2,502,000
Hotel, Motel	\$33,186,000	Vehicle Repairs	\$772,000
Outfitter, Guide	\$30,042,000	Gambling	\$608,000
Rental Cabin, Condo	\$15,642,000	Misc. Services	\$282,000
Groceries, Snacks	\$14,393,000	Farmers Market	\$38,000
Retail Sales	\$7,698,000	Auto Rental	<i>Insufficient Sample Size</i>
Lic., Entrance Fees	\$4,018,000	Transportation Fares	<i>Insufficient Sample Size</i>
TOTAL			\$185,655,000

2017 Contribution of Nonresident Traveler Expenditures in Park County

- 2017 average spending* in Park County by nonresident visitors to Montana totaled \$185.7 million.
- This \$185.7 million in local spending directly supports \$136.2 million of economic activity in the region, and supports an additional \$49.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$185.8 million.

Table 2 - 2017 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$136,230,000	\$25,694,000	\$23,922,000	\$185,846,000
Employment (# of jobs)	2,430	270	230	2,930
Employee Compensation	\$49,019,000	\$5,067,000	\$5,912,000	\$59,998,000
Proprietor Income	\$5,437,000	\$1,340,000	\$849,000	\$7,626,000
Other Property Type Income	\$11,620,000	\$5,991,000	\$5,321,000	\$22,932,000
State & Local Taxes ^A	–	–	–	\$7,781,000

APPENDIX D

3-2018

The Montana Expression 2018: MT Residents' Use of Fishing Access Sites & Public Lands and Waterways Values

Kara Grau
The University of Montana - Missoula

Megan Schultz
The University of Montana - Missoula

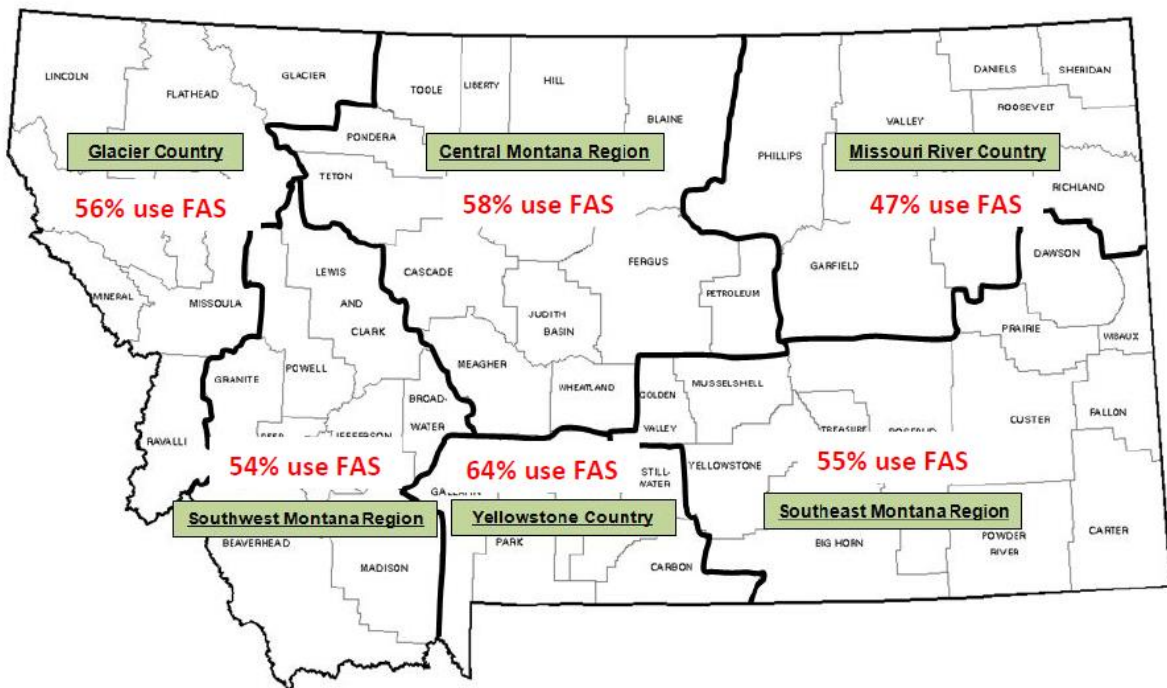


Figure 4: Activity Participation at Fishing Access Sites by Montanans (18 and older) who use FAS

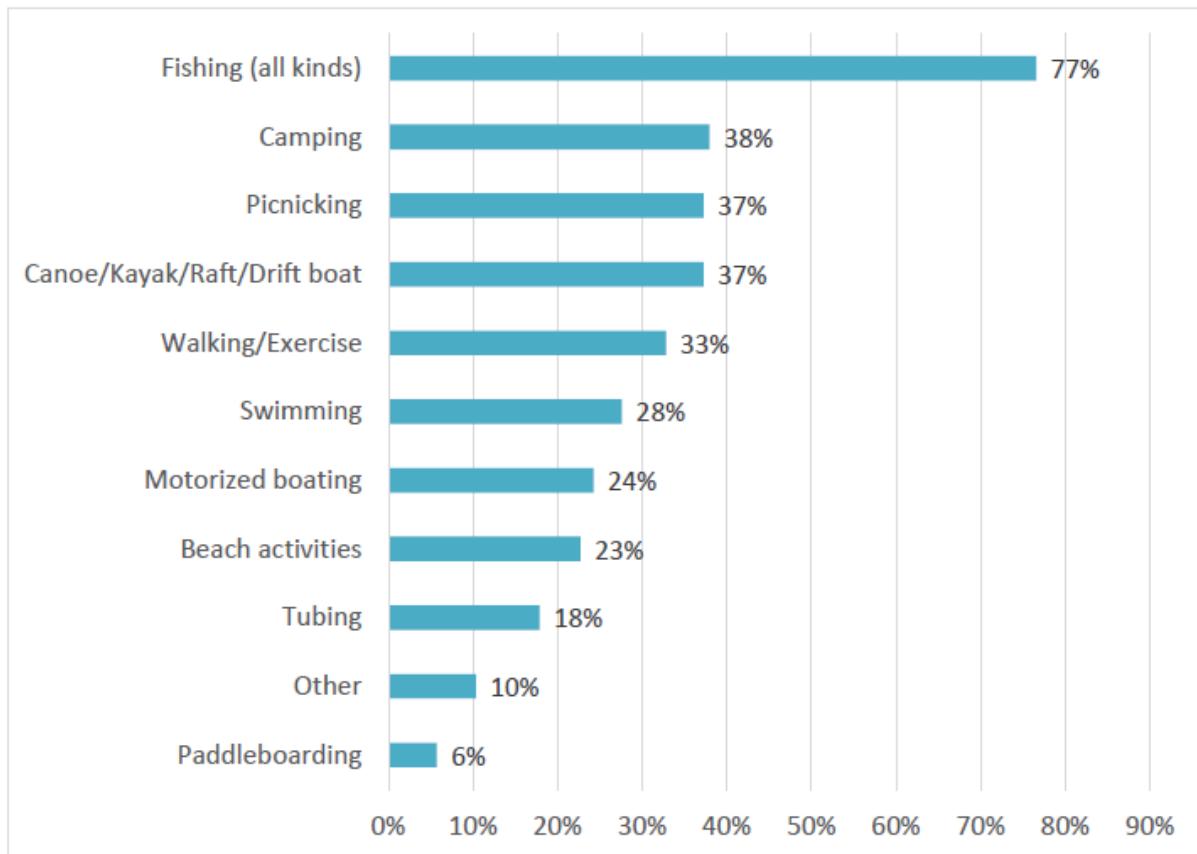


Figure 8: Average Responses to Questions Regarding Residents' Views on Montana Public Lands and Waterways

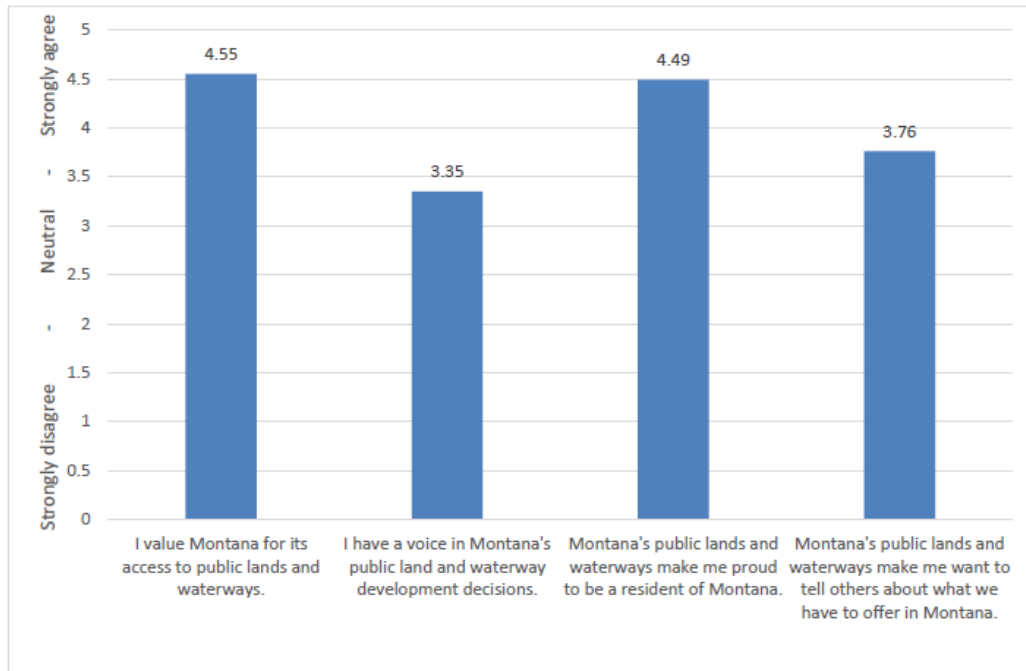


Figure 9: Montana Residents' Responses to Questions Regarding the State's Public Lands and Waterways

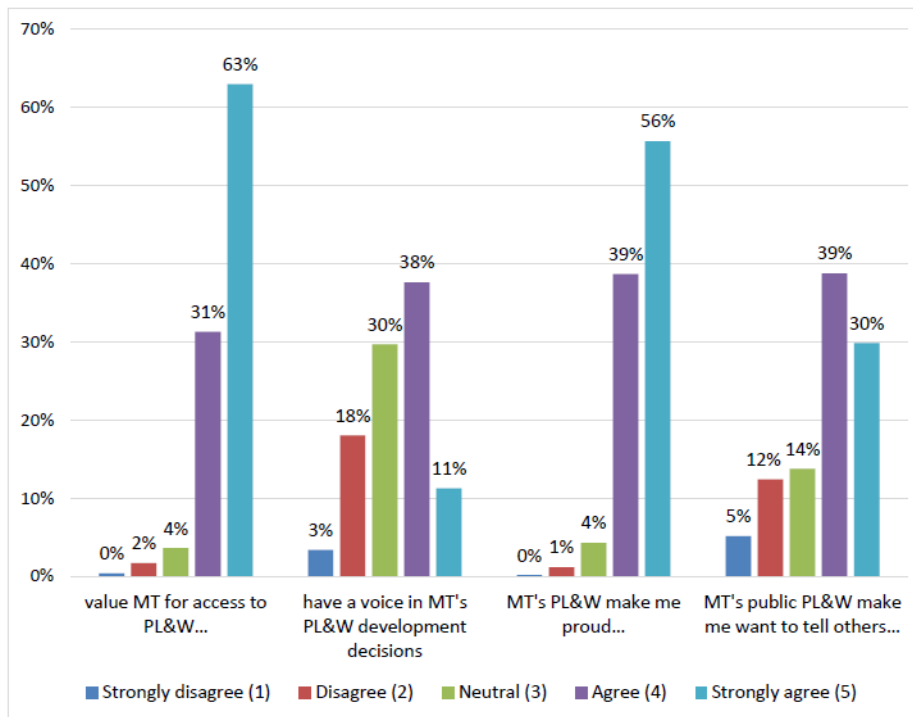


Figure 11: Activity Participation at Fishing Access Sites by Region Residence

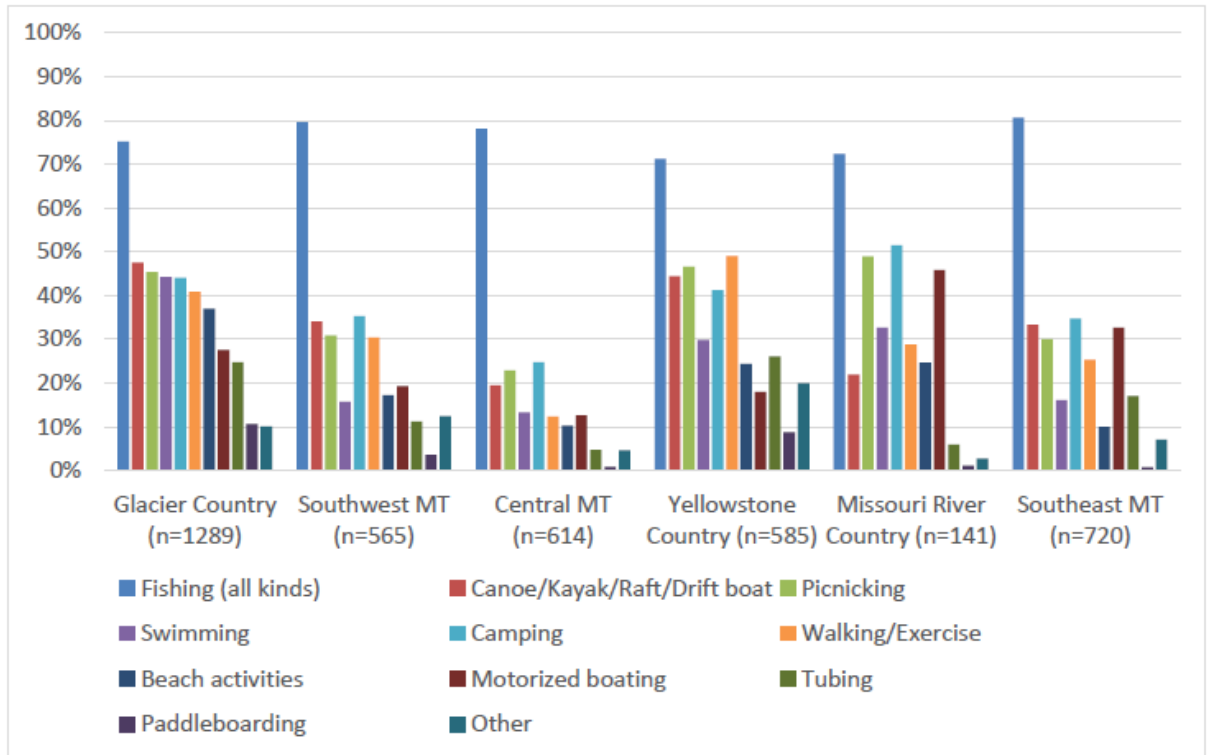


Figure 14: Mean Response by Region of Residence (1, Strongly disagree to 5, Strongly agree)

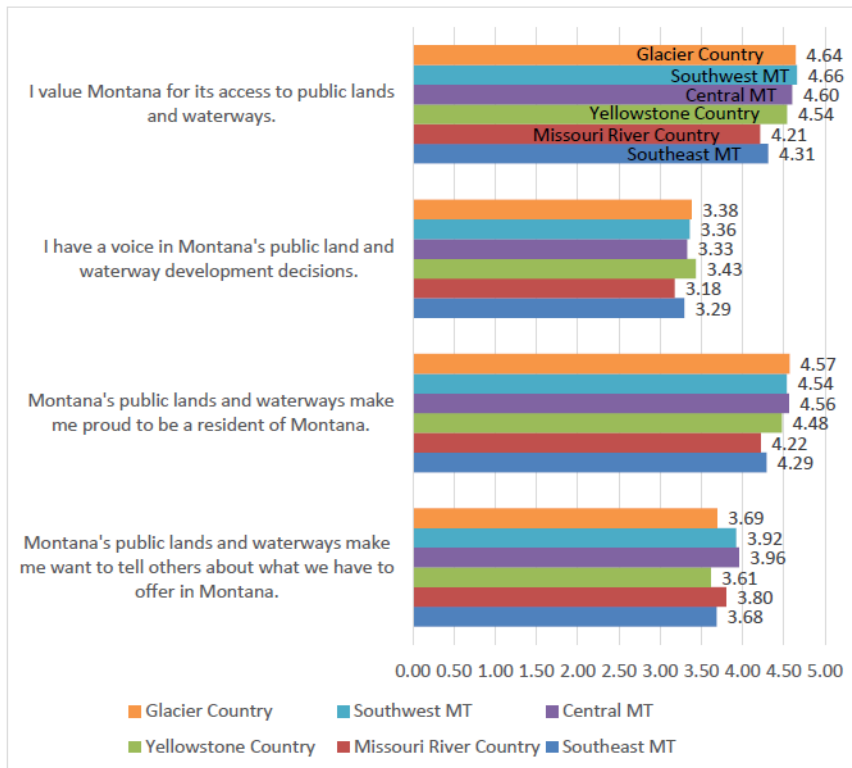


Figure 15: Responses by Region of Residence - I value Montana for its access to public lands and waterways.

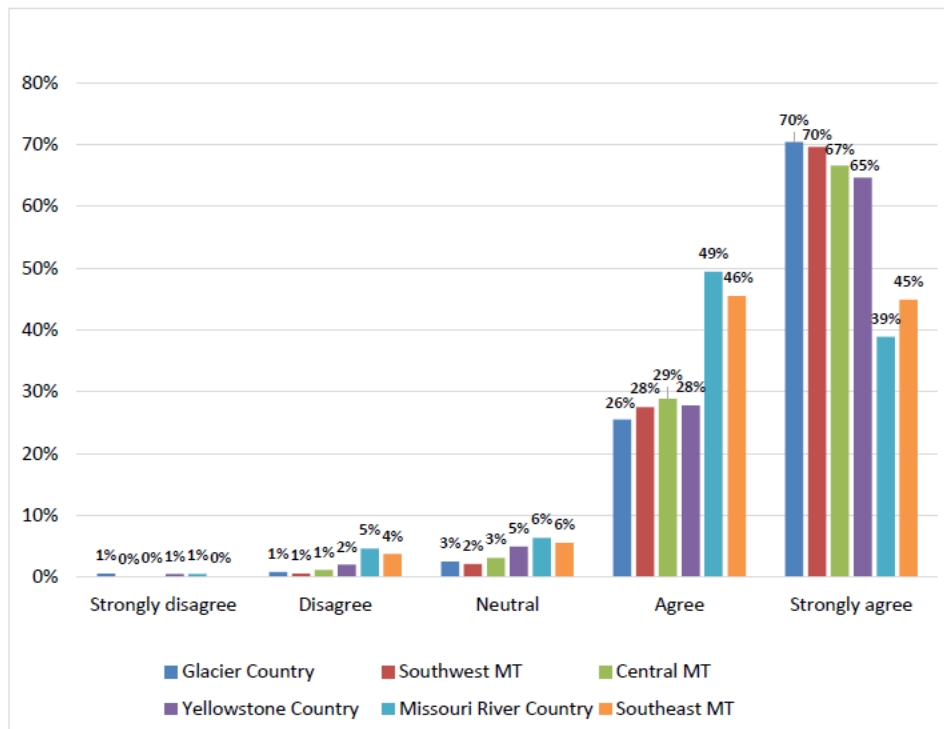
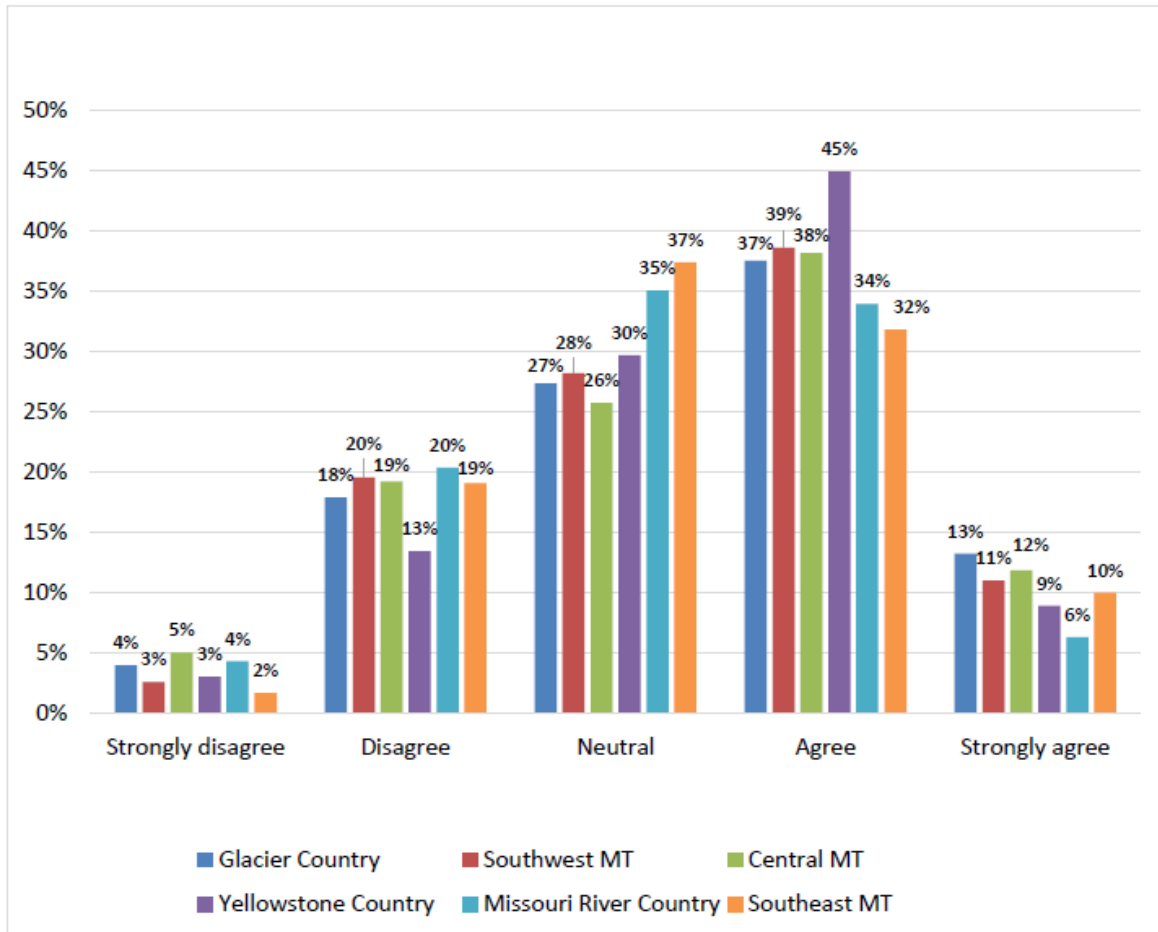


Figure 16: Responses by Region of Residence - I have a voice in Montana's public land and waterway development decisions.



Conclusions

In conclusion, Montanans of all ages utilize fishing access sites for a variety of activities. The majority of residents who use a FAS have fished at an FAS but have also participated in a diversity of other activities. In the event of closures of these sites due to invasive species and/or parasite issues, outdoor recreation participation will be impacted. There would be less of an impact if any closures affected only the waterway, and still allowed access for non-water uses.

Montana residents value the state's waterways and public lands. The fact that Montanans have access to their state's public lands and waterways is a point of pride, though not necessarily something they are all willing to tell others about. It is clear that some residents would like to have more of a voice in development and decision making regarding their public lands and waterways, something they may not care as much about if they did not value the access to them so much. Because they are proud of these areas, and their ability to access them is so valuable, having a voice in what happens to these public lands is clearly important to state residents.

APPENDIX E



Resident Travel in Montana

Prepared by

Kara Grau, M.S.
Norma Polovitz Nickerson, Ph.D.
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Research Report 2018-6

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Abstract

The purpose of the study was to estimate annual resident travel within Montana, the spending volume of resident visitors to counties outside their residence (50 miles or more away from home), and to map the flow of resident travel within Montana. Montana residents took 13,547,000 day trips spending

\$1,662,620,000 and 4,013,000 overnight trips spending \$1,206,970,000 for a total of nearly \$2.87 billion on travel in Montana.

Executive Summary

Travel within Montana by residents, or intrastate travel, is a big contributor to the overall travel industry in the state. This report represents a year-long data collection of resident travel behaviors, spending, and trip activities.

During the 2017 calendar year, the Institute for Tourism and Recreation Research (ITRR) intercepted an average of 900 Montana residents during the first week of each month to inquire about the previous month's travel of 50 miles or more away from home. With the 10,795 total sample size to represent the population of trips and spending, we estimate that residents traveled for day trips over 13.5 million times and slightly over 4 million overnight trips within the state. Those trips allowed dollars to spread beyond their county, resulting in nearly \$2.87 billion in spending statewide.

Day trips represented more than three times the number of overnight trips, and subsequently more total dollars are spent due to day trips (\$1.66 billion in day trips; \$1.21 billion in overnight trips). Business day trips and leisure overnight trips have the highest spending of all trip types. Business trips contribute \$1.36 billion to travel spending. Leisure trips contribute \$1.13 billion to the economy while other types of trips such as medical, shopping, and so forth, contribute \$374 million.

Quarter 4 was the highest travel spending quarter for all types of day trips, while for overnight trips, business and leisure trip spending were highest in quarter 3, and other types of trips were highest in quarter 1.

ES Table 1: Resident trip spending by quarter and trip type

Quarter ¹	Group Day Trips			Group Overnight Trips		
	Business	Leisure/VFR	Other	Business	Leisure/VFR	Other
Q1	\$170,150,000	\$138,420,000	\$76,020,000	\$149,900,000	\$129,000,000	\$18,630,000
Q2	\$217,410,000	\$86,970,000	\$73,930,000	\$137,240,000	\$163,280,000	\$10,230,000
Q3	\$114,660,000	\$128,010,000	\$68,760,000	\$152,040,000	\$179,510,000	\$7,740,000
Q4	\$303,160,000	\$182,150,000	\$102,980,000	\$116,180,000	\$127,060,000	\$16,150,000
Total	\$805,380,000	\$535,550,000	\$321,690,000	\$555,360,000	\$598,860,000	\$52,750,000
Total day trip spending = \$1,662,620,000			Total overnight trip spending = \$1,206,970,000			

¹ Q1=January-March; Q2=April-June; Q3=July-September; Q4=October-December.

Table 4: 2017 trip spending per category by day and overnight travelers

Category	Day Trips	Overnight Trips
Fuel	\$492,343,000	\$273,797,000
Lodging, Camping	\$0	\$188,244,000
Restaurants, bars	\$288,990,000	\$371,494,000
Groceries	\$262,342,000	\$116,652,000
Retail goods	\$474,849,000	\$184,793,000
Service (fees, admissions, etc.)	\$144,093,000	\$71,990,000
Total trip spending =	\$1,662,620,000	\$1,206,970,000

Figure 1: Where MT residents travel to for overnight trips

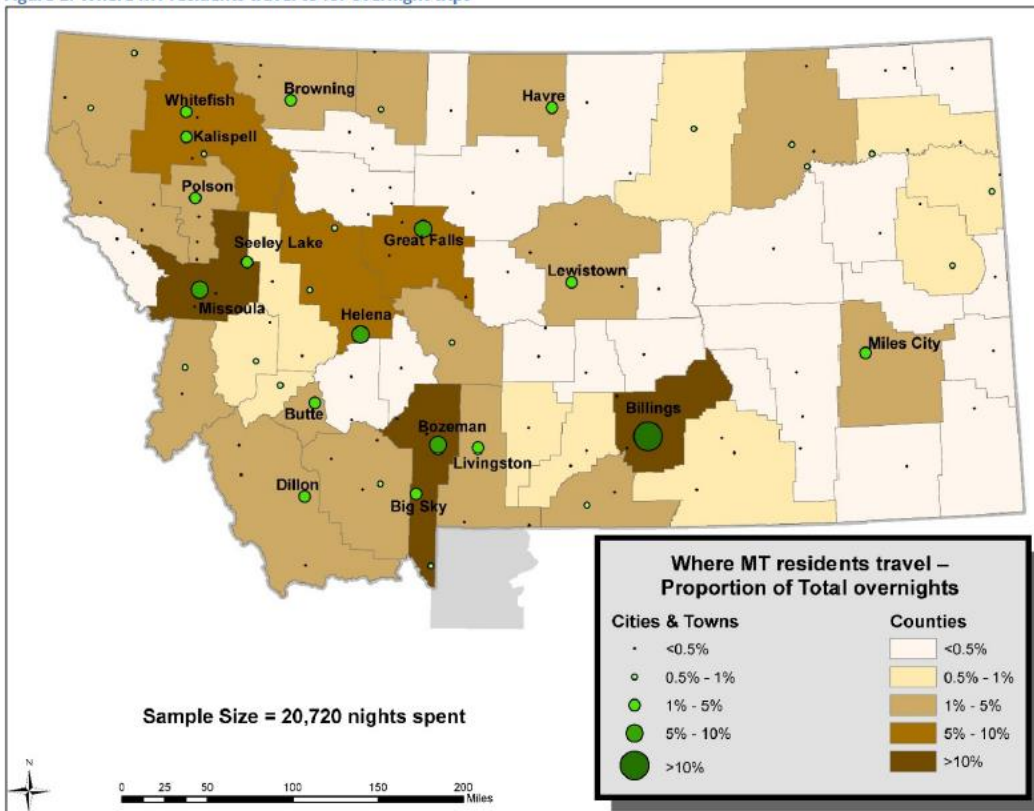
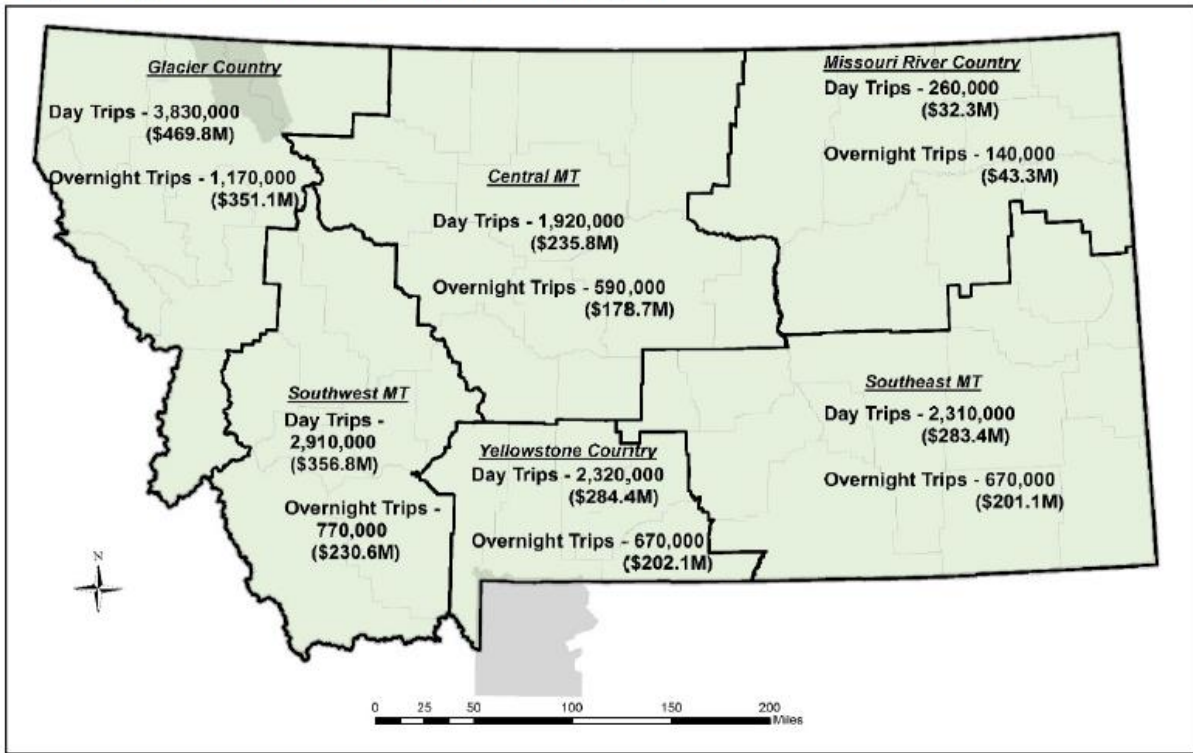


Table 10: Statewide leisure trip activity participation

Activity	Percent	Activity	Percent
Scenic driving	35%	Canoe/kayaking	3%
Day hiking	19%	Rafting/floating	3%
Special dining out	17%	Performing arts	3%
Watching wildlife	16%	Visit Indian Res.	3%
Recreational shopping	16%	Backpacking	2%
Nature photography	13%	Bicycling	2%
Family event	13%	Golfing	2%
Car/RV camping	12%	Lewis & Clark sites	2%
Local brewery	11%	Ghost towns	2%
Festival/events	10%	Dino attractions	2%
Sporting events	10%	Attend wedding	2%
Other fishing	8%	Horseback riding	1%
Historical sites	8%	Geocaching	1%
Hunting	6%	Mt. biking	1%
Motor boating	6%	Road/tour biking	1%
Farmers market	6%	Rock hounding	1%
Museums	6%	Motorcycle tour	1%
Visit hot springs	5%	Snowmobile	1%
Ski/snowboarding	5%	Snowshoe	1%
View art exhibits	5%	Ice fishing	1%
Fly fishing	4%	Local distillery	1%
Birding	3%	Rock climbing	<1%
OHV/ATV	3%	XC ski	<1%

ES Figure 1: Trip numbers and dollars spent within each travel region



Yellowstone Country Travel Region

Yellowstone Country travel region receives 17 percent of resident dollars spent in Montana and 16 percent of all resident overnights in Montana.

Within the region the percent of overnights in the counties is highly skewed toward Gallatin County: Carbon 7%; Gallatin 69%; Park 15%; Stillwater 6%; Sweet Grass 3%.

Table 14: Overnight spending by visitors to Yellowstone Country Travel Region

Spending en route/in Yellowstone Country	En route	Destination	Total Travel Spending
Fuel	\$29,329,000	\$16,526,000	\$45,855,000
Lodging, camping	\$3,490,000	\$28,038,000	\$31,528,000
Restaurants, bars	\$13,354,000	\$48,864,000	\$62,218,000
Groceries	\$7,239,000	\$12,297,000	\$19,536,000
Retail goods	\$3,232,000	\$27,717,000	\$30,949,000
Services (fees, admissions, etc.)	\$766,000	\$11,291,000	\$12,057,000
TOTAL	\$57,410,000	\$144,733,000	\$202,143,000

Other than scenic driving, day hiking, and wildlife watching, city-type activities tended to top the list with recreational shopping in Yellowstone County (Billings), special dining out in Missoula, Gallatin, Lewis & Clark, Flathead, and Cascade Counties (Missoula, Bozeman, Helena, Kalispell-Whitefish-Big Fork, and Great Falls). Local breweries were a draw to each of the top counties/communities with 11% to 23%

of travelers tasting the brews. Finally, events such as attending or participating in a sporting event (5-15%), festivals or special events (9-14%), and family events (5-15%) were typical draws for travelers to other counties.

Including both resident and nonresident travel spending, total travel industry spending in Montana is \$6.23 billion dollars; 54 percent contributed by nonresidents and 46 percent by resident travel within the state.

Figure 1: Where MT residents travel to for overnight trips

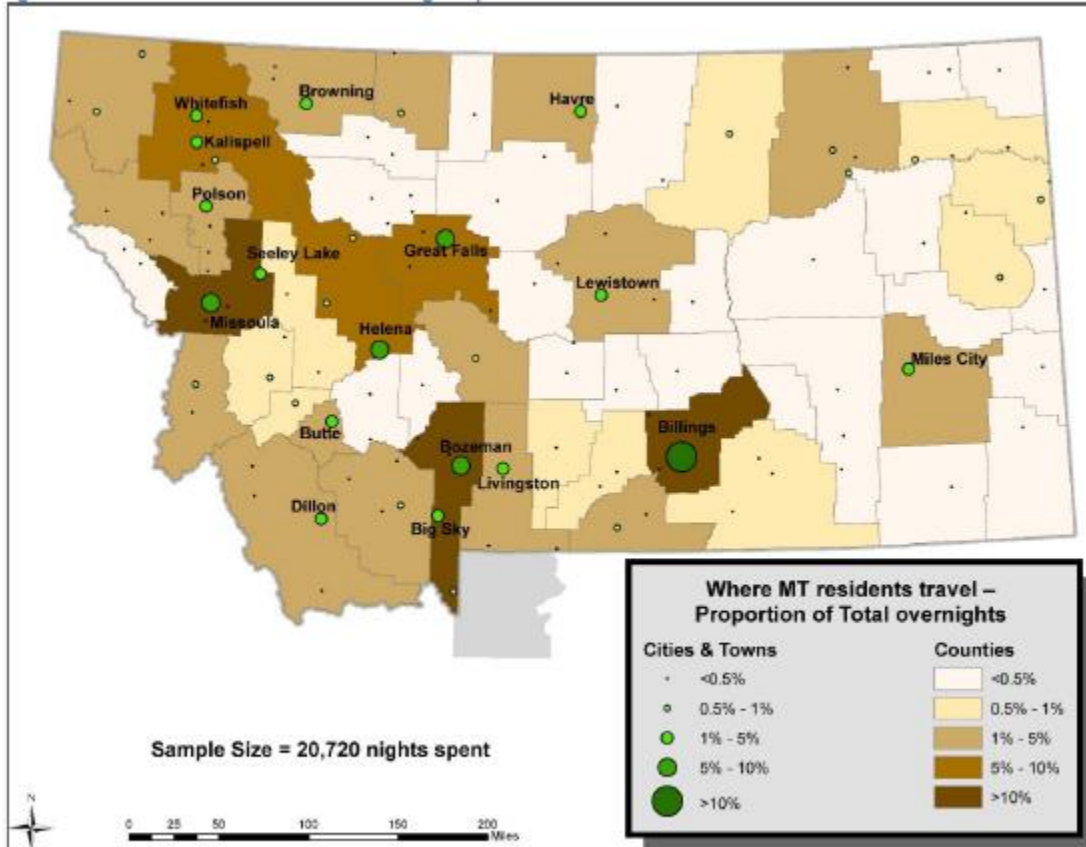


Table 10: Statewide leisure trip activity participation

Activity	Percent	Activity	Percent
Scenic driving	35%	Canoe/kayaking	3%
Day hiking	19%	Rafting/floating	3%
Special dining out	17%	Performing arts	3%
Watching wildlife	16%	Visit Indian Res.	3%
Recreational shopping	16%	Backpacking	2%
Nature photography	13%	Bicycling	2%
Family event	13%	Golfing	2%
Car/RV camping	12%	Lewis & Clark sites	2%
Local brewery	11%	Ghost towns	2%
Festival/events	10%	Dino attractions	2%
Sporting events	10%	Attend wedding	2%
Other fishing	8%	Horseback riding	1%
Historical sites	8%	Geocaching	1%
Hunting	6%	Mt. biking	1%
Motor boating	6%	Road/tour biking	1%
Farmers market	6%	Rock hounding	1%
Museums	6%	Motorcycle tour	1%
Visit hot springs	5%	Snowmobile	1%
Ski/snowboarding	5%	Snowshoe	1%
View art exhibits	5%	Ice fishing	1%
Fly fishing	4%	Local distillery	1%
Birding	3%	Rock climbing	<1%
OHV/ATV	3%	XC ski	<1%

Table 18: Resident day trip travel numbers and spending in destination county*

County	Total Day Trips to County	Total Spent at Destination	County	Total Day Trips to County	Total Spent at Destination
Beaverhead	205,000	\$23,417,000	Madison	219,000	\$32,784,000
Big Horn	94,000	\$14,050,000	Meagher	289,000	\$32,784,000
Broadwater	62,000	\$9,367,000	Mineral	133,000	\$9,367,000
Carbon	578,000	\$65,568,000	Missoula	1,352,000	\$224,804,000
Carter	9,000	\$4,683,000	Park	156,000	\$23,417,000
Cascade	859,000	\$98,352,000	Phillips	203,000	\$9,367,000
Choteau	62,000	\$9,367,000	Pondera	164,000	\$14,050,000

Table 19: Resident overnight numbers and spending in destination county

County	Total Overnight Trips to Destinations in County	Total Spent by Travelers with Destination in County	County	Total Overnight Trips to Destinations in County	Total Spent by Travelers with Destination in County
Beaverhead	76,100	\$23,912,000	Madison	40,700	\$12,868,000
Big Horn	20,300	\$5,984,000	Meagher	38,800	\$12,150,000
Blaine	12,400	\$3,707,000	Mineral	15,600	\$4,932,000
Broadwater	15,800	\$5,057,000	Missoula	503,900	\$153,976,000
Carbon	41,900	\$13,374,000	Musselshell	9,000	\$2,486,000
Carter	3,900	\$1,038,000	Park	88,000	\$27,277,000
Cascade	310,500	\$91,864,000	Petroleum	2,500	\$725,000
Choteau	15,400	\$4,775,000	Phillips	23,000	\$6,774,000

This year-long study was conducted to provide an estimate of resident trip numbers and spending throughout the state of Montana. These data, along with nonresident visitor numbers and spending, provide a full picture of the travel industry in Montana.

In 2017, residents spent nearly \$2.87 billion on trips 50 miles or more away from home but still in Montana. In comparison, nonresidents spent nearly \$3.36 billion in Montana on their trips⁷. Total travel industry spending in Montana is \$6.23 billion dollars; 54 percent contributed by nonresidents and 46 percent by resident travel within the state.

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