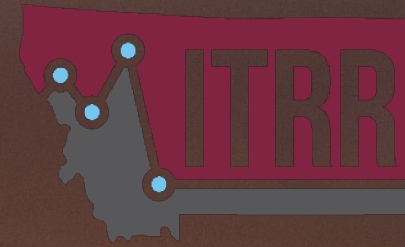




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INSTITUTE FOR  
TOURISM & RECREATION  
RESEARCH

# Travel and Tourism Impacts of National Parks and Public Lands

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Research





# Overview

- Stories from COVID
- The Outdoor Recreation Industry
- A new Era of Visitor Data Collection for the National Park Service
- Case Studies of the Influence of National Park Tourism and their Gateway Communities
- Closing thoughts on Opportunities and Challenges Moving Forward





# Stories from COVID





# National Parks Hosted 237 Million Visitors in 2020

- The number represents a **28%** decrease from the previous year due largely to temporary park closures and restrictions implemented in response to the coronavirus pandemic.
- Although overall visitation dropped, a number of parks experienced record crowds and welcomed new visitors. Trails, overlooks and open spaces provided safe ways for visitors to **recreate responsibly**, get some fresh air and stay active.



# MONTANA STATE PARKS SEE RECORD SETTING VISITATION IN 2020

## Top five most visited parks through September 2020:

- 1- Flathead Lake State Park (all units): +33.5% YoY
- 2- Cooney Reservoir State Park: +26% YoY
- 3- Giant Springs State Park: -0.2% YoY
- 4- Lake Elmo State Park +25.7% YoY
- 5- Thompson Chain of Lakes State Park +42.5% YoY

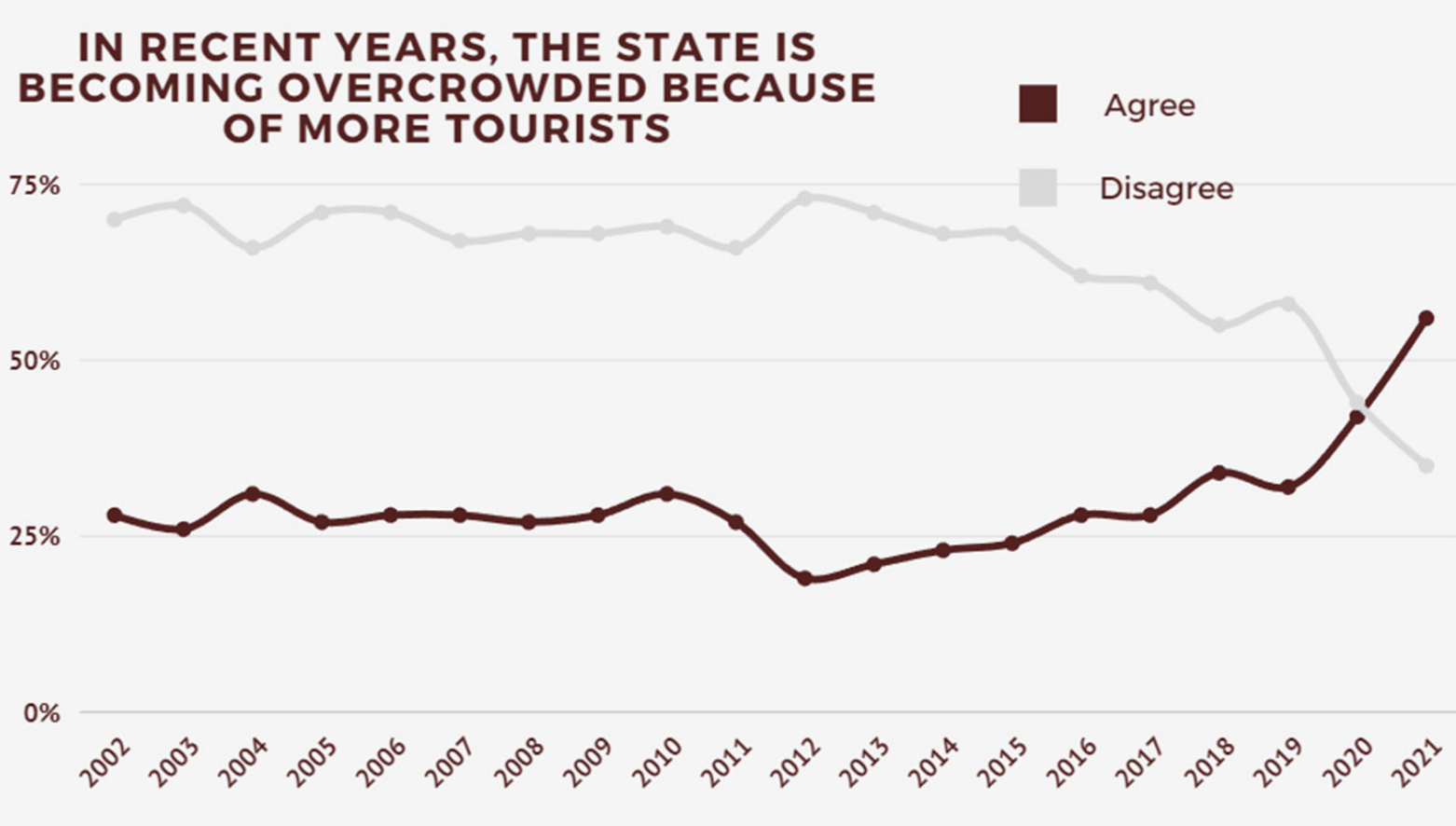
System wide, Montana's parks hosted 3 million visitors; a 24.4% increase over 2019.

80% of parks saw increases from 2019 to 2020.

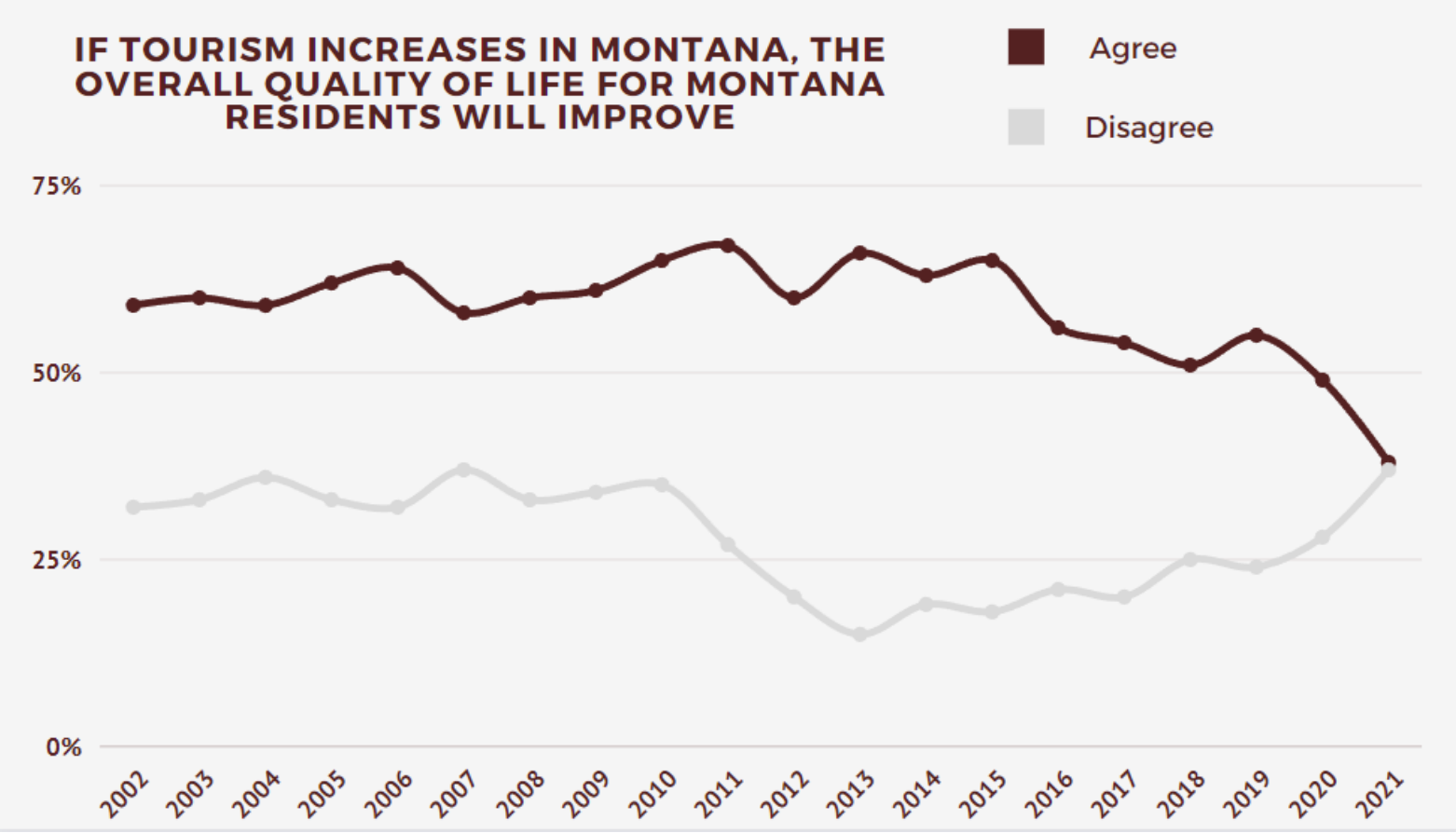




# UM Report shows Montanans feel 'overcrowded' by tourists

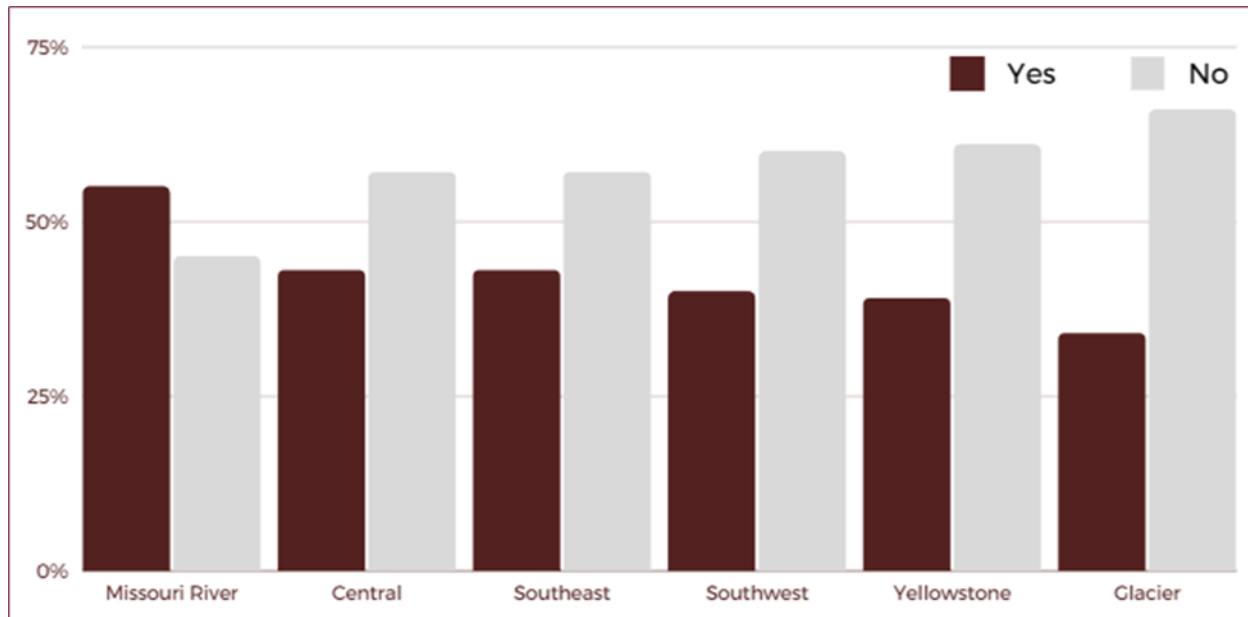


# UM Report shows Montanans feel 'overcrowded' by tourists



# UM Report shows Montanans feel 'overcrowded' by tourists

DO YOU FEEL PUBLIC LAND MANAGEMENT AGENCIES IN MONTANA ARE SUFFICIENTLY STAFFED?

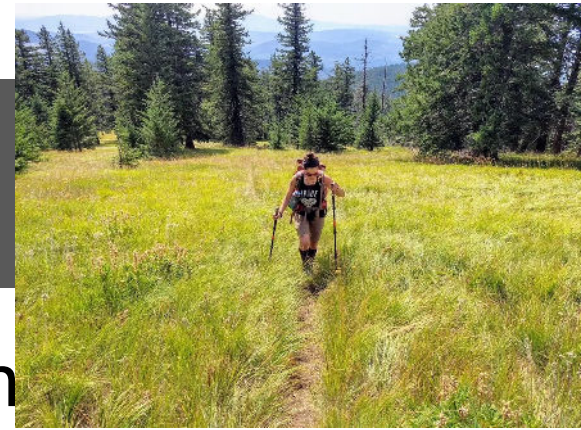


61%

A majority of respondents felt that public land management agencies in Montana are **NOT** sufficiently staffed



# Other Stories of COVID and Public Lands



## At State Parks, revenue is up and staffing levels are down

**By Laurel Demkovich**  
Washington State Standard

Washington State Parks took in more money than expected during the past two years as the pandemic drove a boom in outdoor recreation.

State Parks collected almost \$123 million between July 2021 and April of this year, \$12 million more than anticipated. That's according to a financial report delivered at a State Parks and Recreation Commission meeting on Wednesday. Almost 70% of the income was from camping fees and the sale of Discover Passes, which are needed to access state recreation sites.

Despite rising revenue, the agency is struggling to hire and keep staff, with the Eastern Washington region staffed at only 60% of target levels.

Parks Director Diana Dupuis said Wednesday the COVID-19 pandemic changed how state parks are used. "We're going through a renaissance right now," Dupuis said.



# Other Stories of COVID and Public Lands

## Zion National Park Sets Record September Visitation



As St. George, Utah remains sunny and warm this fall, Zion National Park set a record high number in visitors during the month of September.

COVID-19 isn't stopping people from getting outside and visiting one of the most popular national parks in the country.

Visitor Use Planner Susan McPartland said the increase of visitors at Zion National Park was exciting to see, especially since there was a significant drop in visitation during the COVID-19 shutdown in the spring.

"This September we had just over 520,000 visitors come to the park," McPartland said. "That's about a 4.73 increase from what we saw in 2019, and it's definitely the highest September that we've seen to date."



A dramatic landscape of layered rock formations under a sunset sky. The scene is dominated by dark, rugged mountains with distinct horizontal strata. The sky is a mix of deep orange, yellow, and dark grey, suggesting a late evening or dawn. A bright yellow rectangular frame is superimposed over the center of the image, containing the title text.

# The Outdoor Recreation Industry



# Outdoor Recreation Contributed 1.9% to the Nation's GDP

## The U.S. outdoor recreation economy is big

Compare the 2021 GDP contribution of outdoor recreation to other familiar industries.

**Outdoor Recreation:**  
**\$454 Billion**  
value-added contribution to GDP

|                              |               |
|------------------------------|---------------|
| Motor Vehicle Manufacturing: | \$159 Billion |
| Oil, Gas, and Coal:          | \$129 Billion |
| Air Transportation:          | \$157 Billion |
| Performing Arts:             | \$131 Billion |

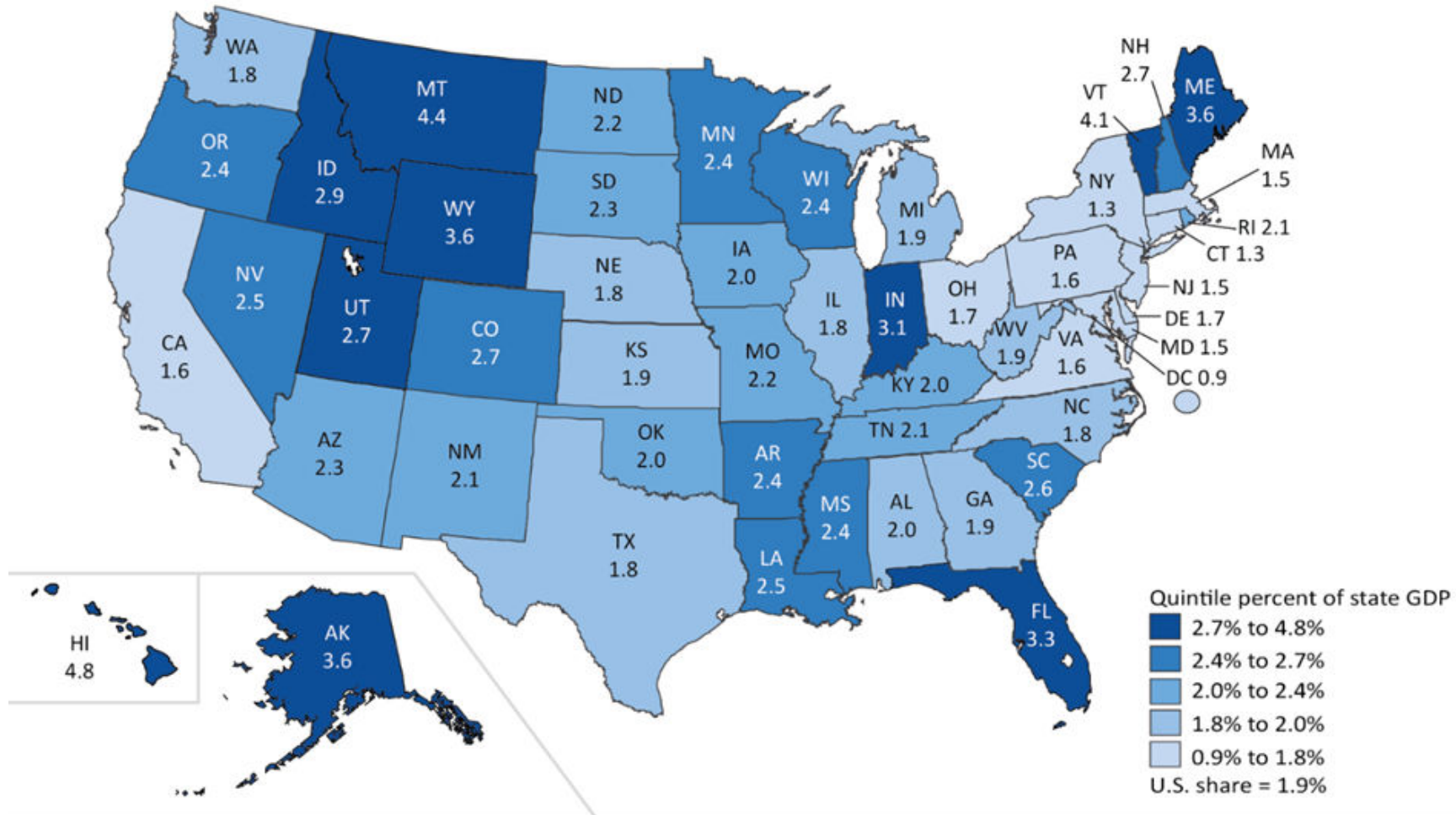


Source: Bureau of Economic Analysis, Outdoor Recreation Satellite Account and Regional Economic Accounts.





# 2021 State Outdoor Recreation Value Added as a Percent of State GDP





# The Montana Travel Industry - 2022 Summary

## MONTANA'S OUTDOOR RECREATION ECONOMY

- **GREW NEARLY 30%** from 2020-2021
- Accounted for **4.4% STATE GDP**

Source: US Bureau of Economic Analysis (BEA) 2021

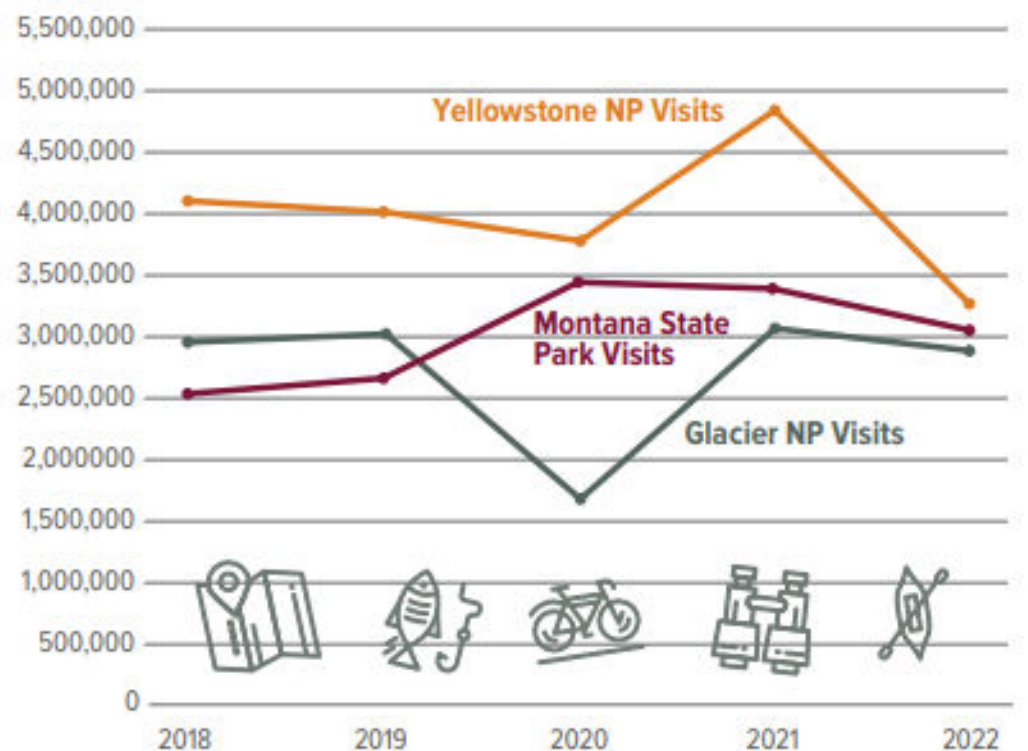
## TOP NONRESIDENT ACTIVITIES





# The Montana Travel Industry - 2022 Summary

## 5 Years of Montana Public Land Visitation



## TOP MONTANA SITES VISITED BY NONRESIDENTS

- Glacier National Park . . . . . **31%**
- Yellowstone National Park . . . . . **23%**
- Montana State Parks . . . . . **9%**
- Hot springs . . . . . **6%**
- Ghost towns . . . . . **5%**





# A New Era of Visitor Data Collection for the National Park Service

**Socioeconomic Monitoring Visitor Surveys**



# Socioeconomic Monitoring Visitor Surveys

## 2020 Visitor Spending Effects

**313 Parks** had **no park-specific survey data**

**75 Parks** had **park-specific survey data**

**52 Parks** using survey data **10-20 years old**

**21 Parks** using survey data **from the last 5 years**



# National Sampling Approach





# Year One Parks (2022)

| Park Type           | High Visitation  | Low Visitation   |
|---------------------|--|--|
| Historic, Non-Urban | Cumberland Gap NHP<br>Mount Rushmore NM<br>Vanderbilt Mansion NHS        | Fort Bowie NHS<br>Fort Laramie NHS<br>Martin Van Buren NHS |
| Historic, Urban     | Gateway Arch NP<br>Korean War Veterans NMEM<br>Thomas Jefferson NMEM     | General Grant NMEM<br>Morristown NHP<br>Thomas Edison NHP  |
| Nature              | Capitol Reef NP<br>Grand Teton NP<br>Rocky Mountain NP                   | Guadalupe Mountains NP<br>Isle Royale NP<br>Pinnacles NP   |
| Recreation          | Cape Hatteras NP<br>Natchez Trace PKWY<br>National Capital Parks Central | Catoctin MP<br>Lake Meredith NRA<br>Niobrara NSR           |



# Year Two Parks (2023)

| Park Type           | High Visitation   | Low Visitation  |
|---------------------|---|---|
| Historic, Non-Urban | Canyon de Chelly NM<br>Fort Donelson NB<br>Klondike Gold Rush NHP Alaska          | Aztec Ruins NM<br>Tuskegee Airmen NHS<br>Tuskegee Institute NHS             |
| Historic, Urban     | Franklin Delano Roosevelt Memorial<br>National Capital Parks-East<br>San Juan NHS | Federal Hall NM<br>Mary McLeod Bethune Council House NHS<br>Stones River NB |
| Nature              | Badlands NP<br>Cuyahoga Valley NP<br>Everglades NP                                | Dinosaur NM<br>Great Basin NP<br>Lassen Volcanic NP                         |
| Recreation          | Delaware Water Gap NRA<br>George Washington Memorial PKWY<br>Golden Gate NRA      | Gauley River NRA<br>Greenbelt Park<br>Prince William Forest Park            |



A dramatic landscape of layered rock formations under a sunset sky. The word "Implementation" is overlaid in a white box with a yellow border. The scene features dark, rugged terrain in the foreground and middle ground, with a prominent, flat-topped mountain peak in the center. The sky is filled with warm, orange and yellow light from the setting sun, with some clouds catching the light. The overall mood is serene and majestic.

# Implementation



# Data Collection Methods

## Information was collected using two methods:

### 1 Intercept Survey

- Collected by interviewers at locations throughout the park over an approximately 10-day period.
- Approach visitors at key locations to best represent visitation.

### 2 Follow-up Survey

- Handed to intercept respondents to be completed after their visit and mailed back to the research team.
- Respondents have the option to complete the survey online after their visit.
- These data are combined with intercept survey to form a complete picture of each respondent's experience.

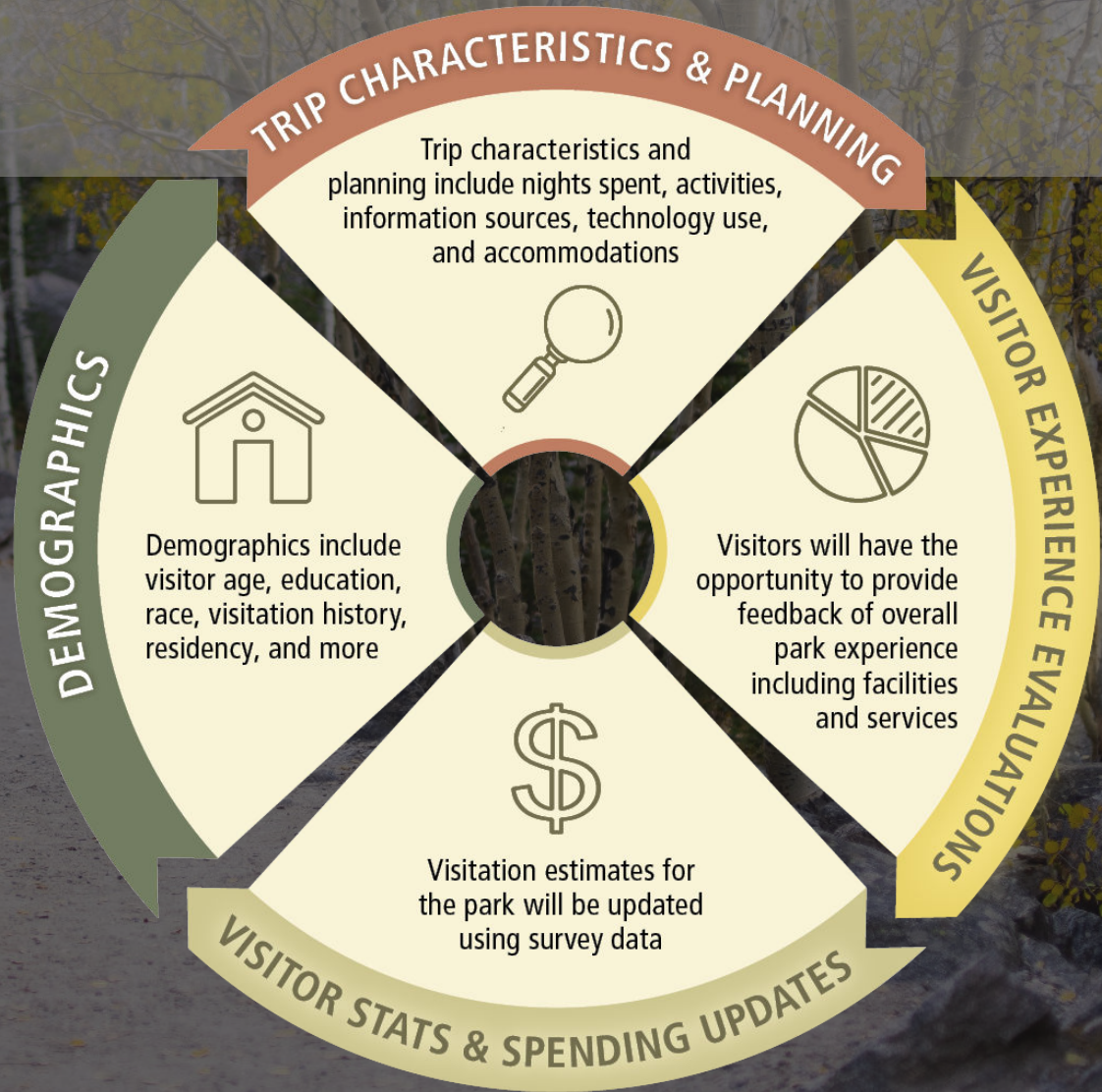


# Year One On-Site Process





# Types of Data Collected






# Reporting and Results

## Park-level report

National Park Service  
U.S. Department of the Interior




Natural Resource Stewardship and Science

### 2022 Socioeconomic Research of Grand Teton National Park


Report on 2022 Data Collection

Natural Resource Report NPS/GRTE/NRR—2023/2510



## National report

National Park Service  
U.S. Department of the Interior




Natural Resource Stewardship and Science

### 2022 Socioeconomic Monitoring of National Park Service Visitors

Report on 2022 Data Collection

Natural Resource Report NPS/NRSS/EQD/NRR—2023/2550

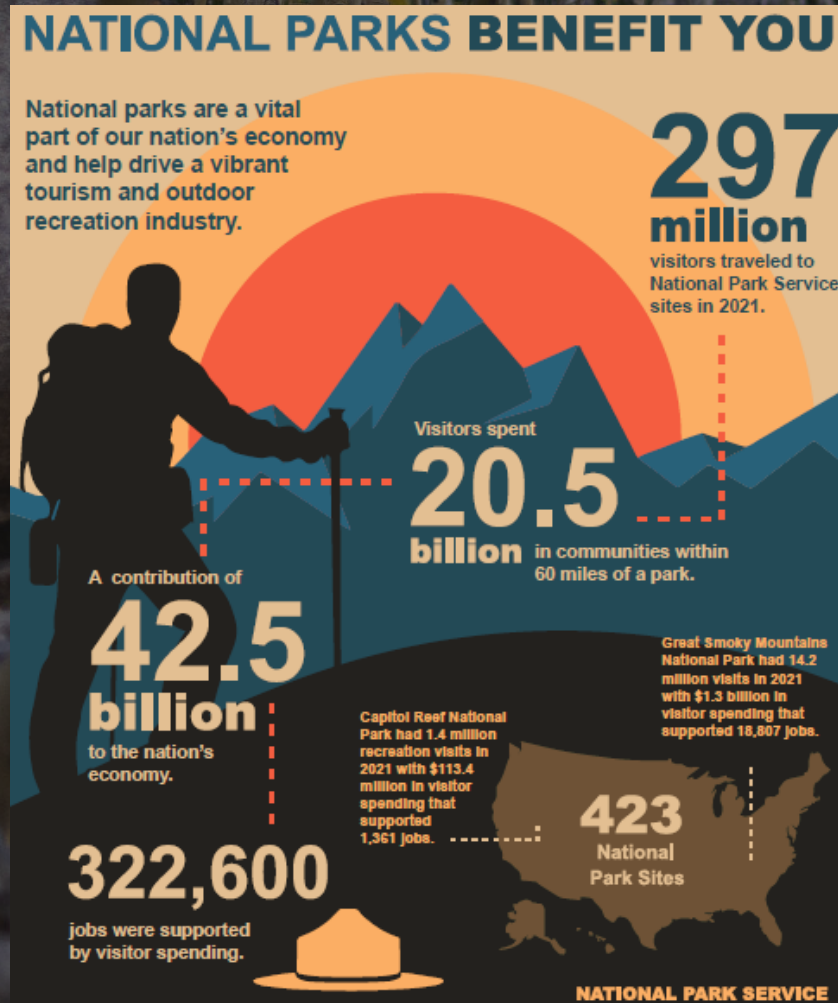


## Visitor Spending Reports





# Visitor Spending Effects (VSE) Analysis



*“And by the way, our national parks aren’t just fun to explore, they’re good for our local and national economies. Sometimes people try to pose conservation against economic development. But it turns out that studies show that every dollar we invest in our national parks generates \$10 for local economies.”*

President Obama, Yosemite National Park, June 20, 2016

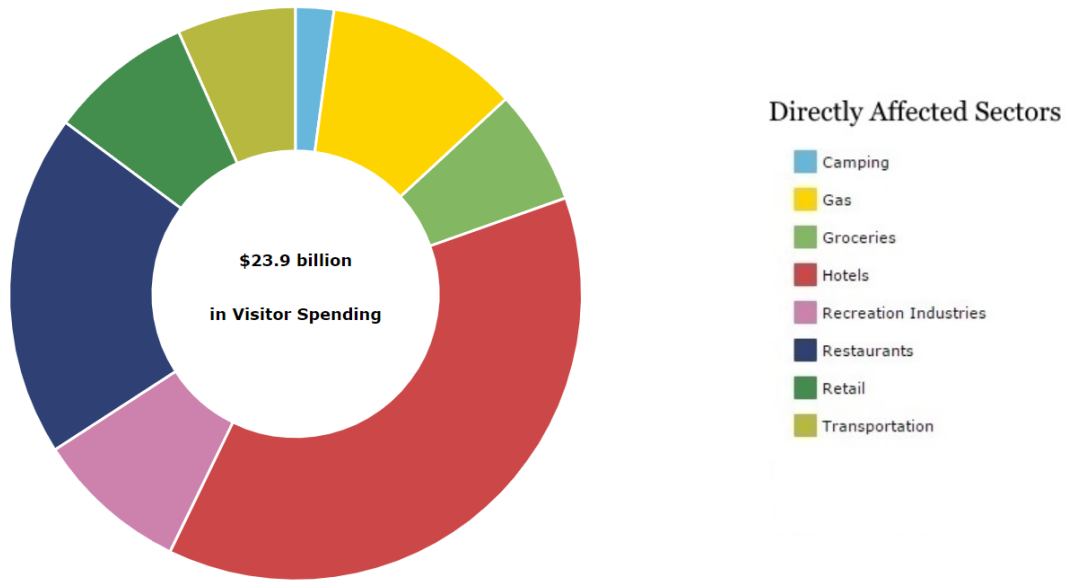


# Visitor Spending Dashboards

## Economic Contributions to the National Economy

In 2022, 312 million park visitors spent an estimated \$23.9 billion in local gateway regions while visiting National Park Service lands across the country. These expenditures supported a total of 378 thousand jobs, \$17.5 billion in labor income, \$29.0 billion in value added, and \$50.3 billion in economic output in the national economy.

- Visitor Spending
- Jobs
- Labor Income
- Value Added
- Economic Output



<https://www.nps.gov/subjects/socialscience/vse.htm>

National Park Service  
U.S. Department of the Interior



Natural Resource Stewardship and Science

## 2022 National Park Visitor Spending Effects

*Economic Contributions to Local Communities, States, and the Nation*

Natural Resource Report NPS/NRSS/EQD/NRR—2023/2551





# NPS Lands Across the West

