

2024 COOKE CITY AREA RESEARCH STUDY

FINAL PRESENTATION



MONTANA'S
YELLOWSTONE
COUNTRY



RRC

INSTITUTE FOR
TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA

INTRODUCTIONS



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INTRODUCTION



Two Primary Objectives:

Provide **neutral, unbiased research** to help the region better understand the potential decisions and impacts of changes on winter access.

Explore **other recreation access topics** to benefit the region year-round in serving their guests.



Five Linked Studies:

- 1) Local community survey of Cooke City, Silver Gate, Colter Pass, and Crandall Residents
- 2) Regional survey of Park County MT/WY Residents
- 3) Summer 2023 survey of Cooke City visitors
- 4) Winter 2024 survey of Cooke City visitors
- 5) Secondary analysis of economic impacts

- **Sample sizes for each survey were strong.**
 - A representative collection of responses was collected through all four surveys.
- The winter 2024 survey was delayed until enough snow was on the ground for visitors to be in the area.

Study Component	Sample Size
Local Community Survey (October 2023)	294 completed surveys
Regional Park County, MT/WY Survey (March/April 2024)	644 completed surveys
2023 Summer Visitor (August 2023)	728 completed surveys
2024 Winter Visitor (March 2024)	117 completed surveys



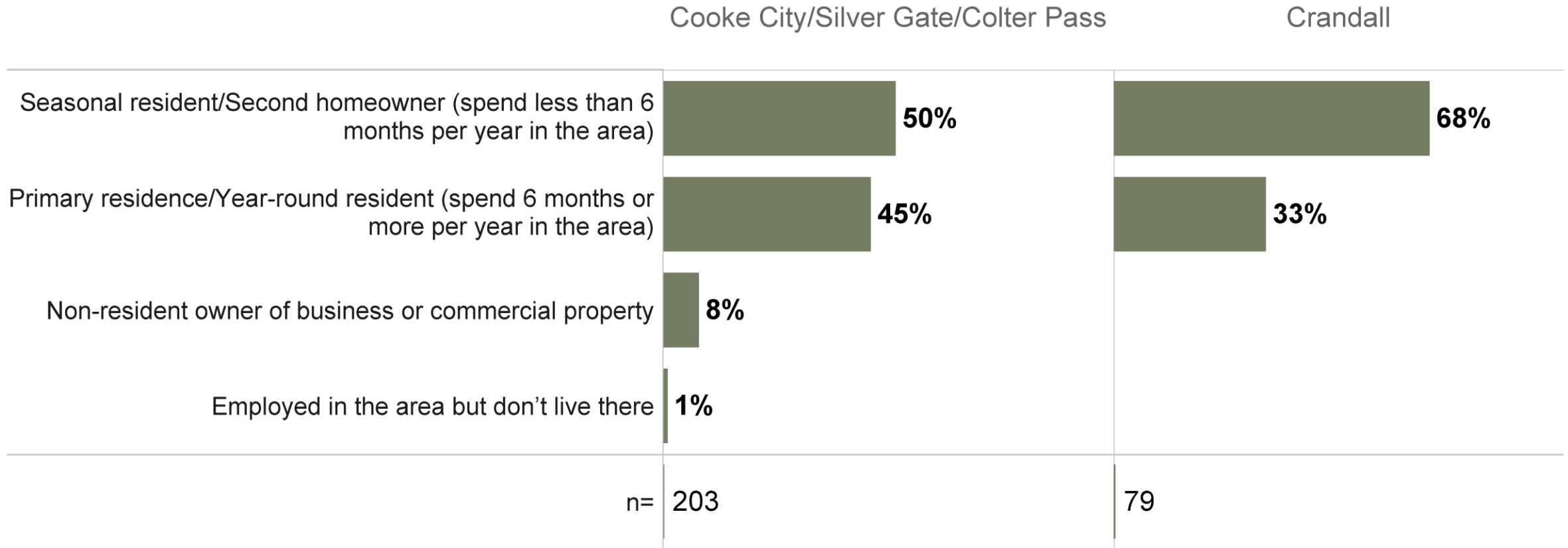
HIGHLIGHTS FROM THE FOUR SURVEYS



2023 LOCAL COMMUNITY SURVEY

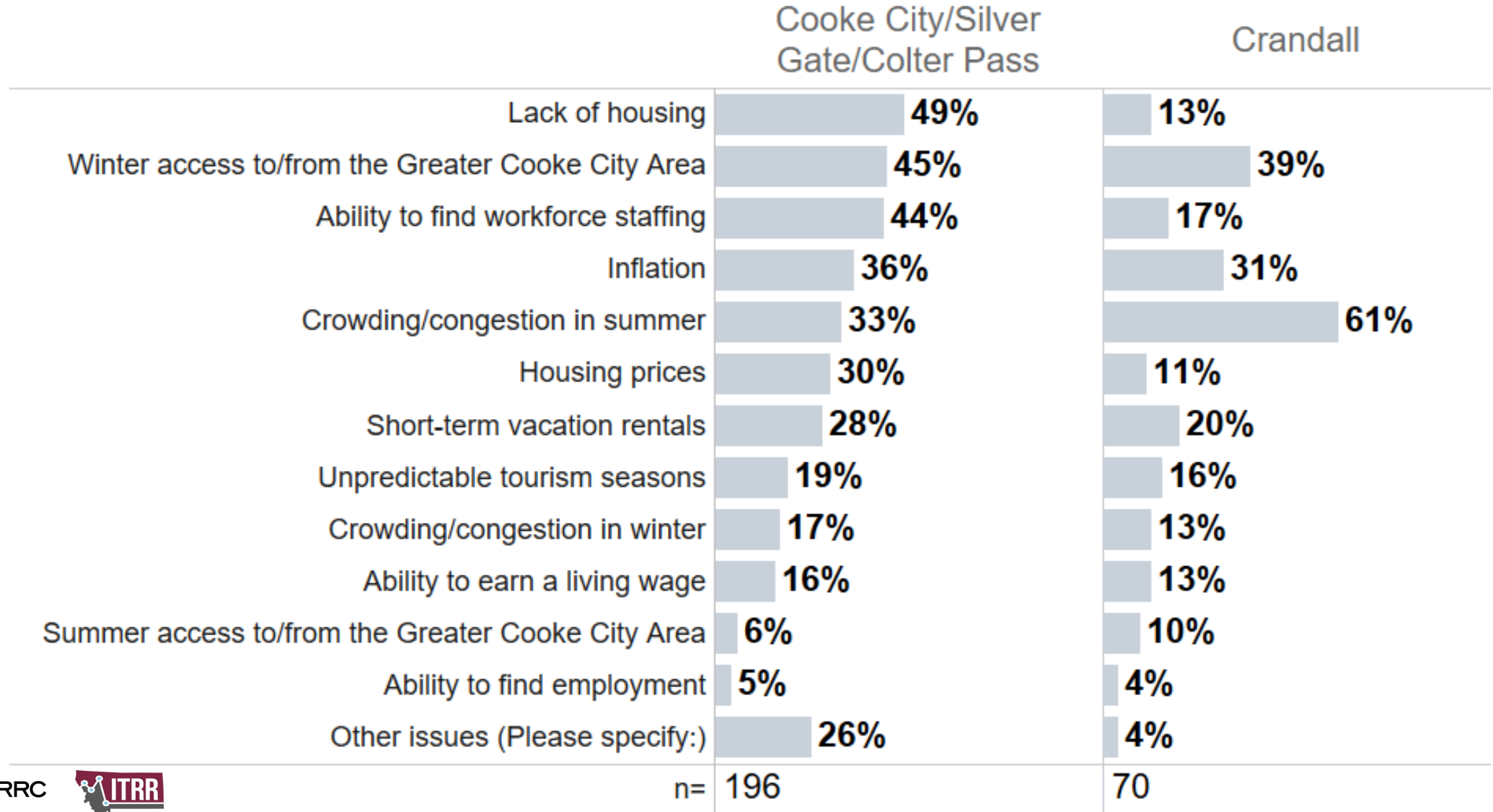
RESIDENCE TYPE

What describes your residence in the Greater Cooke City Area?



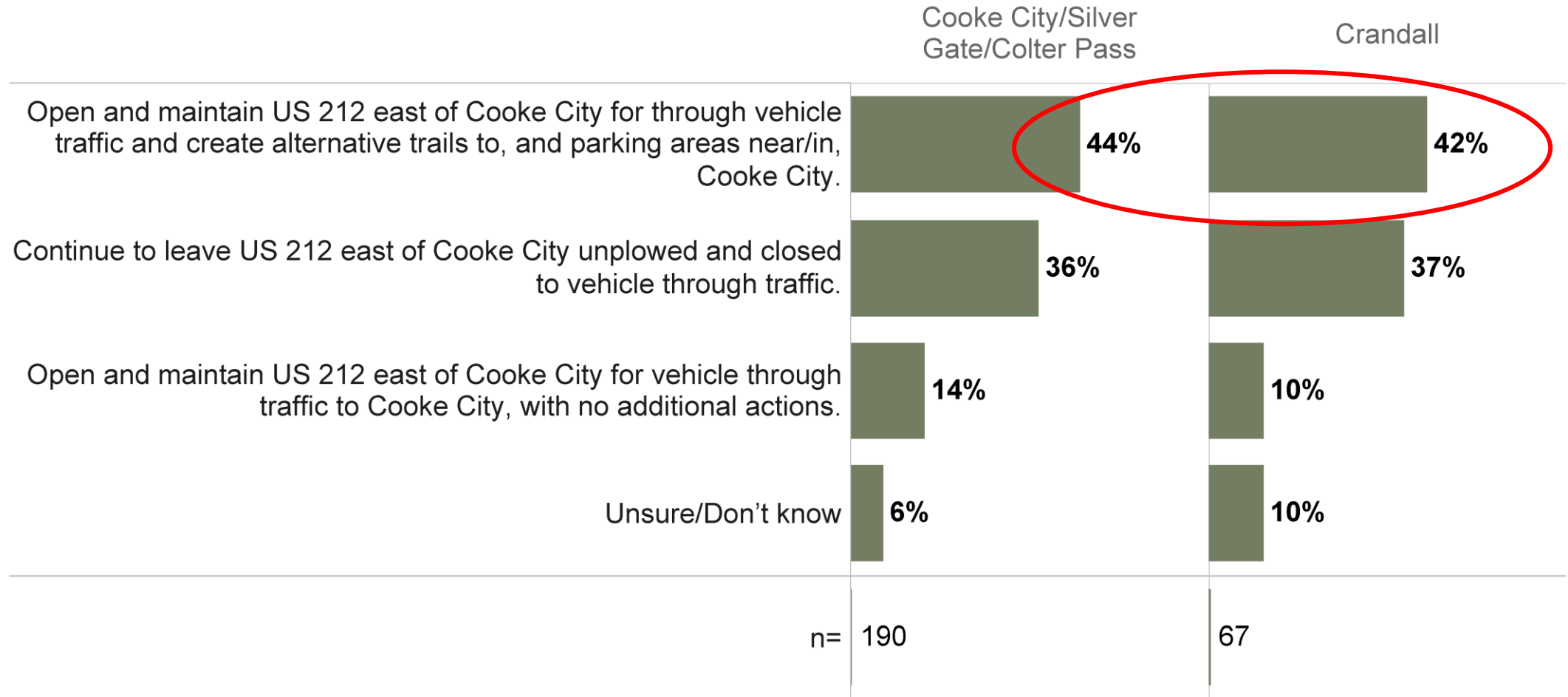
CHALLENGES

What are the biggest impacts or challenges affecting you in the Greater Cooke City Area?



HYPOTHETICAL SCENARIO

Based on hypothetical future scenarios, which scenario would you prefer for the Greater Cooke City Area for winter access on US 212 east of Cooke City?





2024 REGIONAL RESIDENT SURVEY

AREA OF THE REGION

Top 5 Cities of Residence

	Grand Total	Montana Residents	Wyoming Residents
Livingston	38%	77%	
Cody	34%		66%
Powell	15%		30%
Gardiner	5%	9%	
Emigrant	3%	6%	
Other	6%	8%	4%

HYPOTHETICAL SCENARIOS IN THE REGION

Given the following hypothetical winter road access scenarios on US 212 East of Cooke City, how likely are you to visit the Cooke City area in the future under each scenario?

Rating Category	Crosstab by:	Avg.	n=	1 - Very unlikely	2 - Somewhat unlikely	3 - Neutral/No change in likelihood	4 - Somewhat likely	5 - Very likely
Open and maintain US 212 East of Cooke City and add replacement trails and additional parking.	Montana Residents	3.2	264	17%	16%	27%	16%	25%
	Wyoming Residents	3.6	283	13%	8%	23%	19%	36%
Open and maintain US 212 East of Cooke City with no additional actions.	Montana Residents	2.9	275	27%	11%	27%	15%	20%
	Wyoming Residents	3.4	290	18%	11%	19%	20%	33%
Continue to leave US 212 East of Cooke City unplowed and closed to vehicle traffic.	Montana Residents	3.1	279	26%	6%	30%	8%	30%
	Wyoming Residents	2.3	294	47%	16%	14%	8%	15%

IMPACT ON RECREATION IN THE REGION

If the currently unplowed section of US212 were to be plowed each winter with additional parking and a replacement trail, please indicate whether you would be likely to change your participation in each of the following:

Rating Category	Crosstab by:	Avg.	n=	1 - Much less often	2 - Somewhat less often	3 - No change	4 - Somewhat more often	5 - Much more often
I would go to Cooke City in the winter for general recreation/leisure purposes	Montana Residents	3.2	294	7%	5%	64%	13%	11%
	Wyoming Residents	3.8	293	5%	2%	37%	21%	35%
I would take trips to recreate in Yellowstone National Park in the winter season	Montana Residents	3.2	295	10%	2%	61%	15%	12%
	Wyoming Residents	3.8	297	9%	1%	31%	20%	38%
I would go to Cooke City in the winter to participate in nature viewing (wildlife, scenery, etc.)	Montana Residents	3.1	291	7%	4%	64%	16%	9%
	Wyoming Residents	3.8	300	5%	1%	42%	16%	37%
I would go to Cooke City in the winter to participate in nonmotorized snowsports (skiing, snowshoeing, etc.)	Montana Residents	3.1	293	8%	7%	59%	16%	10%
	Wyoming Residents	3.5	286	8%	1%	49%	15%	28%
I would go to Cooke City in the winter to participate in motorized snowsports (snowmobiling)	Montana Residents	2.9	284	12%	5%	71%	7%	5%
	Wyoming Residents	3.2	283	8%	5%	59%	8%	20%



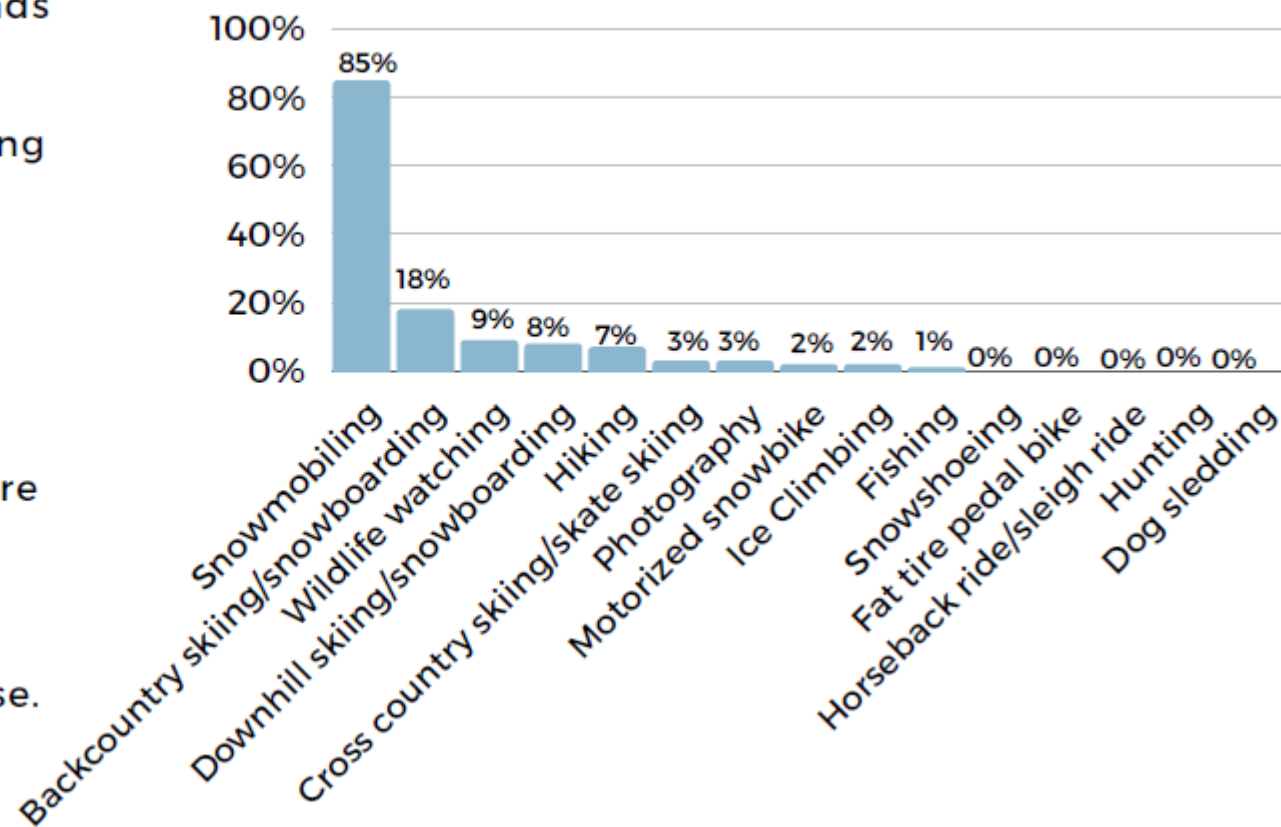
2024 WINTER VISITOR SURVEY

WINTER ACTIVITIES

WINTER ACTIVITIES & SNOWMOBILING IN COOKE CITY/SILVER GATE AREA

When asked, “What kinds of winter activities will you participate in during this trip to Cooke City/Silver Gate area?”

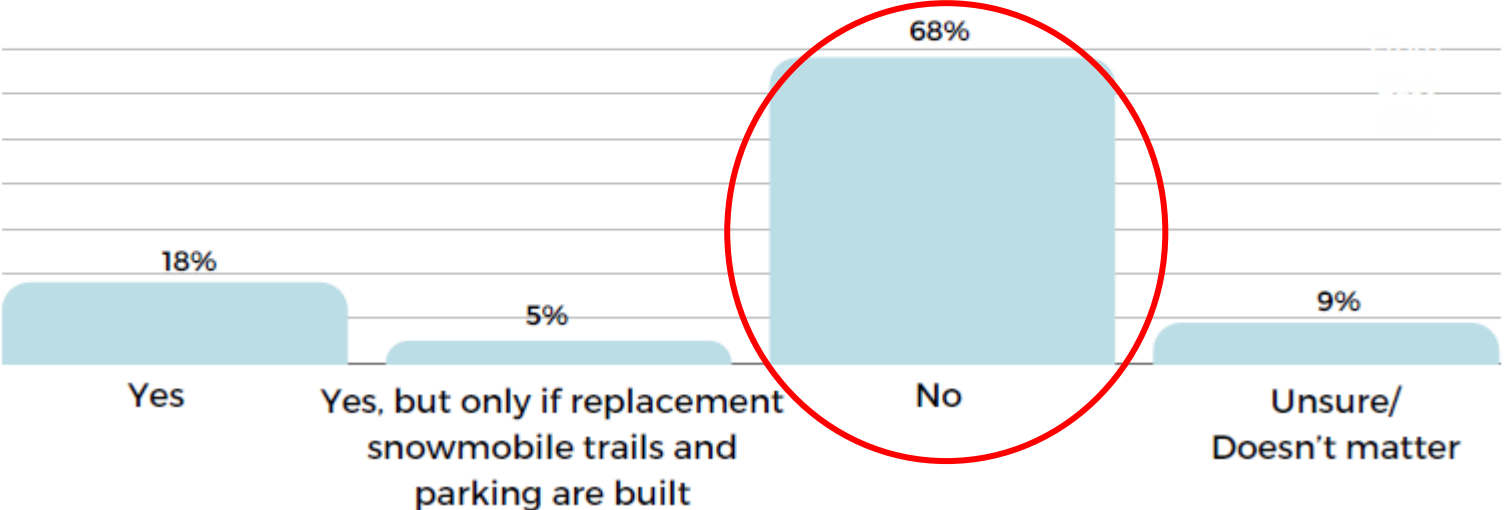
85% of respondents (n=99) indicated snowmobiling, and were asked additional questions about their groups’ snowmobile use.



PREFERENCES FOR PLOWING

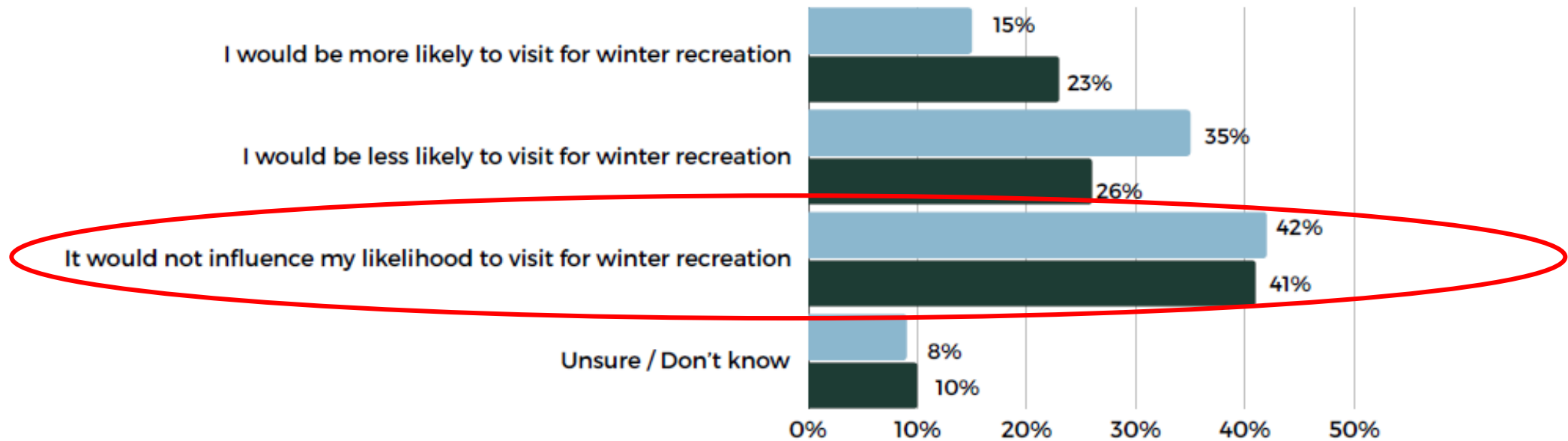
WINTER TRAVEL TO COOKE CITY/SILVER GATE AREA

AS A VISITOR TO THE AREA, WOULD YOU PREFER TO HAVE US 212 EAST OF COOKE CITY PLOWED DURING THE WINTER SEASON?



LIKELIHOOD FOR VISITING

■ HOW WOULD PLOWING US 212 EAST OF COOKE CITY, WITHOUT ADDING ANY REPLACEMENT TRAILS OR PARKING, INFLUENCE YOUR LIKELIHOOD TO VISIT COOKE CITY/SILVER GATE AREA FOR WINTER RECREATION?



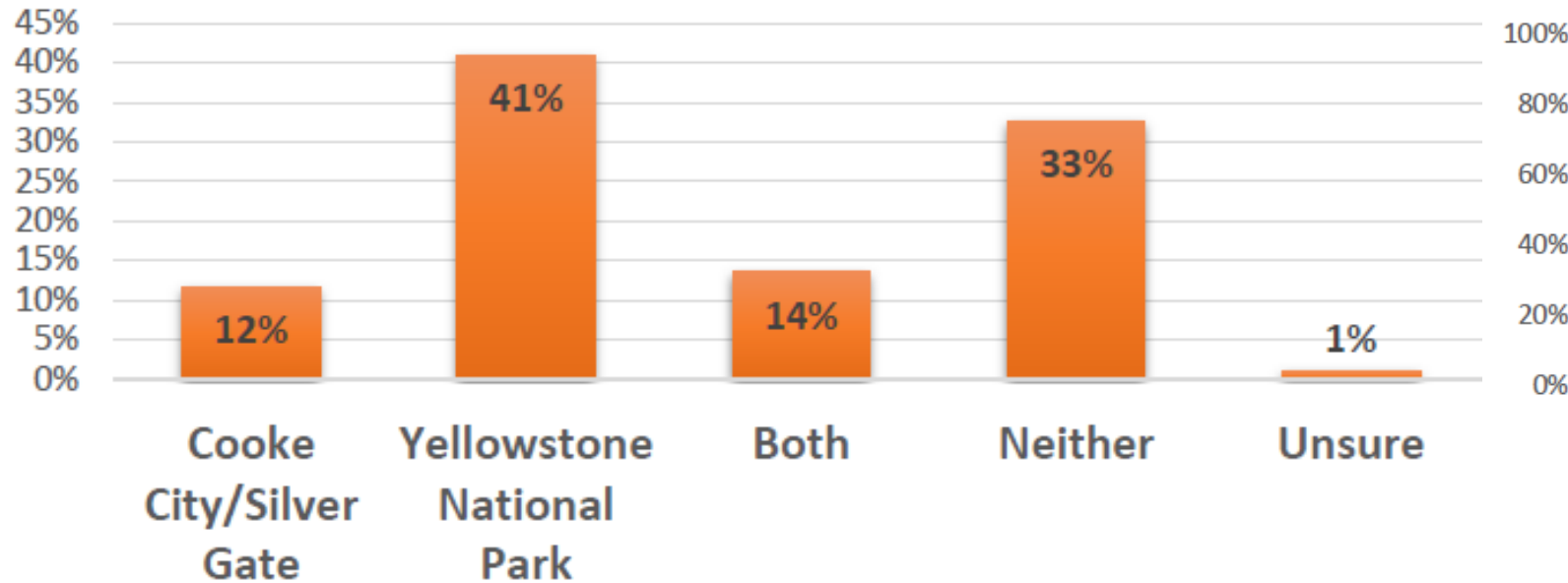
■ HOW WOULD PLOWING US 212 EAST OF COOKE CITY, WITH THE ADDITION OF REPLACEMENT TRAILS AND PARKING, INFLUENCE YOUR LIKELIHOOD TO VISIT COOKE CITY/SILVER GATE AREA FOR WINTER RECREATION?



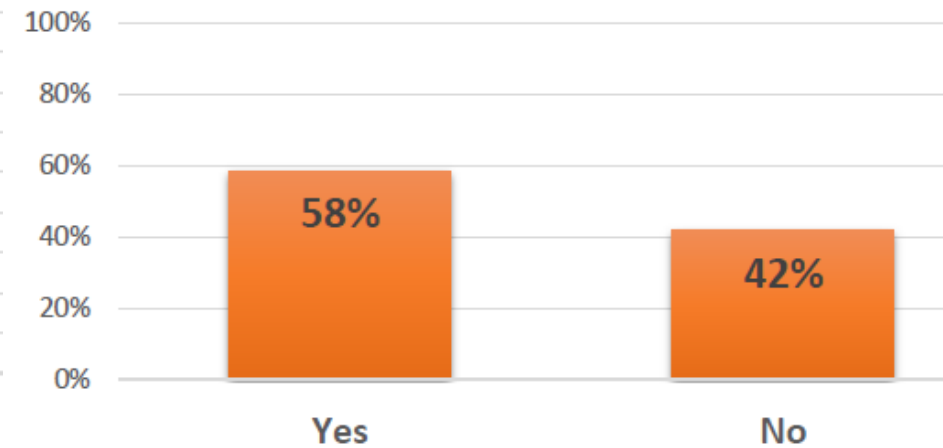
2024 SUMMER VISITOR SURVEY

SUMMER TRIP CHARACTERISTICS

Was Cooke City/Silver Gate, Yellowstone National Park, or both your primary destination on your trip?



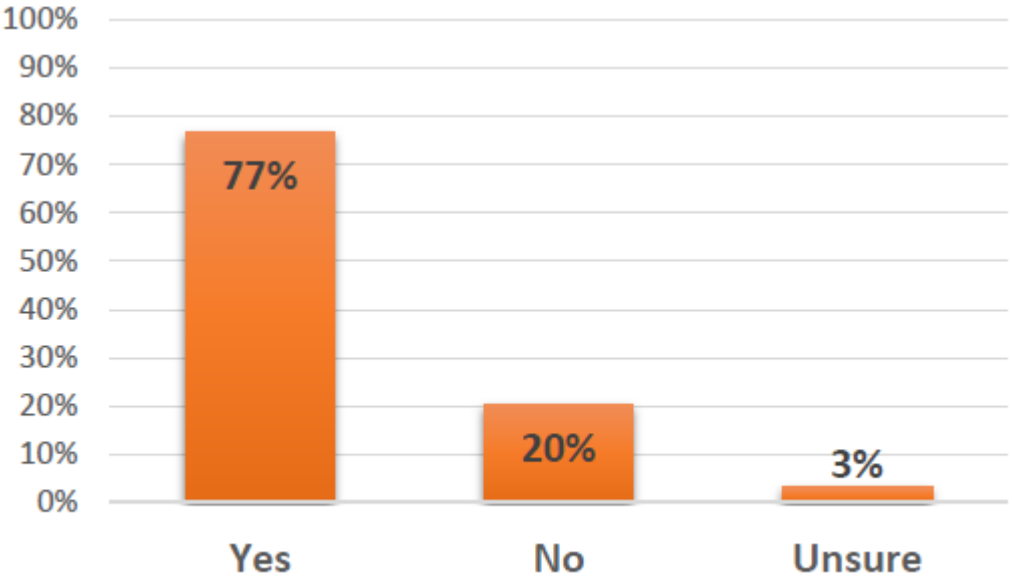
Is this your first visit to the Cooke City/Silver Gate area?



AWARENESS OF CURRENT ROAD ACCESS

Majority of respondents were aware of current winter road access

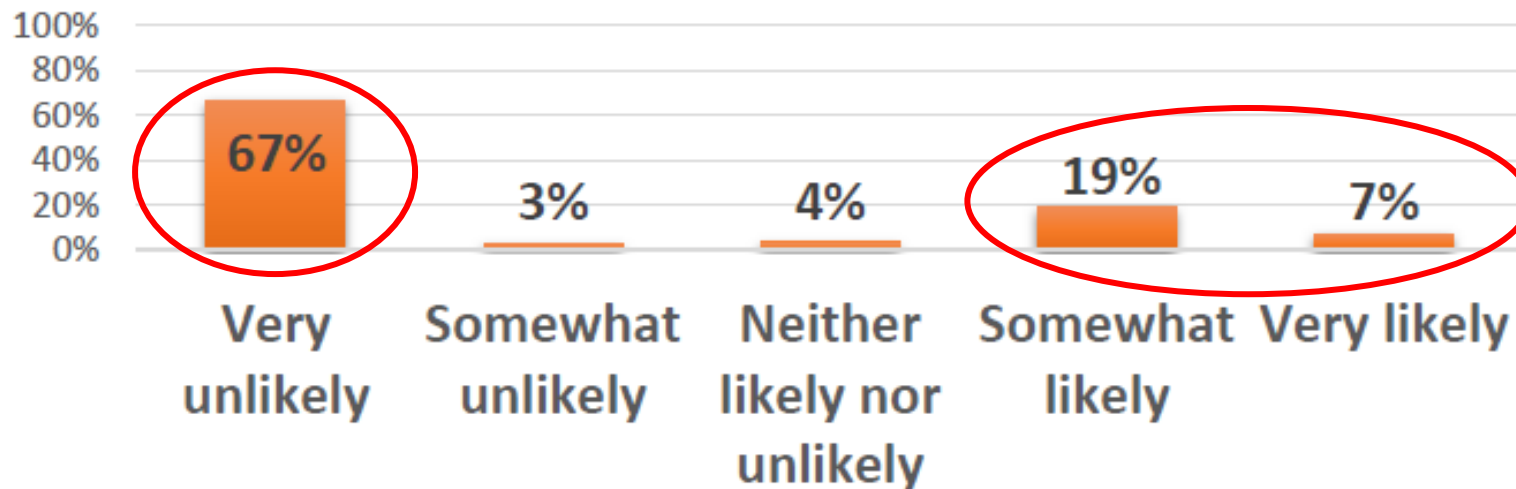
Are you aware that Highway 212 east of Cooke City is unplowed and closed to vehicle traffic during winter months?



LIKELIHOOD TO VISIT COOKE CITY

If never visited the area before *or* never during winter....

How likely would you be to consider Cooke City/Silver Gate as part of a future winter vacation/recreation trip?





SECONDARY ANALYSIS

INTRODUCTION

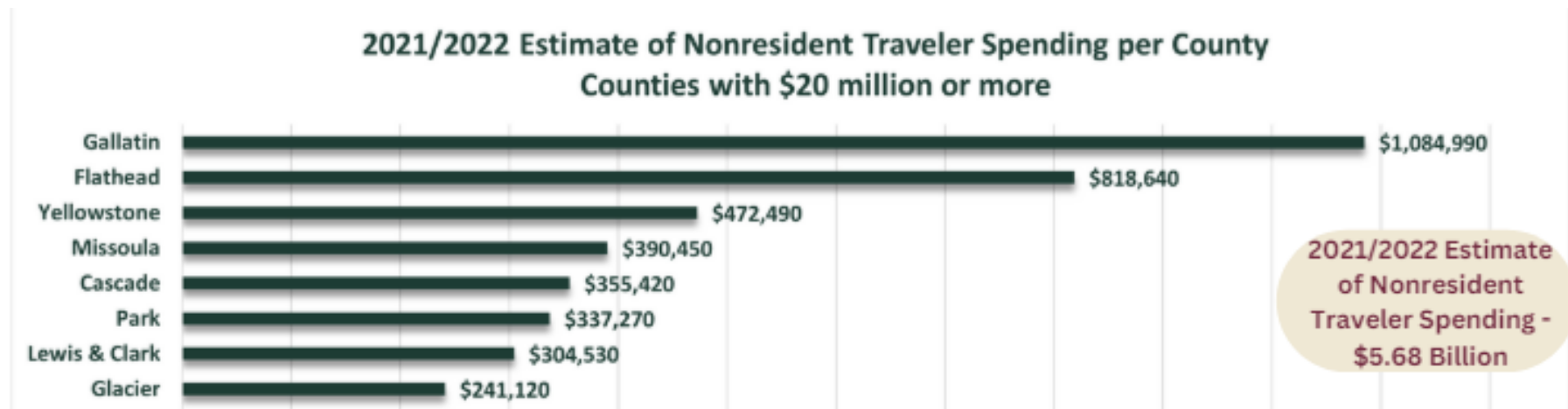
The purpose of this study phase is multi-faceted including:

- 1) To explore tourism spending by season using ITRR's comprehensive data;
- 2) To identify trends in resort and lodging tax data;
- 3) And, to use these data and the information garnered from the previous phases to build scenarios that explore how changes in recreational access impact the local area and beyond.

While much of the secondary data comes from Montana, Wyoming implications are also highlighted throughout using current research.

2022 PARK COUNTY NONRESIDENT TRAVELER EXPENDITURES & ECONOMIC CONTRIBUTION

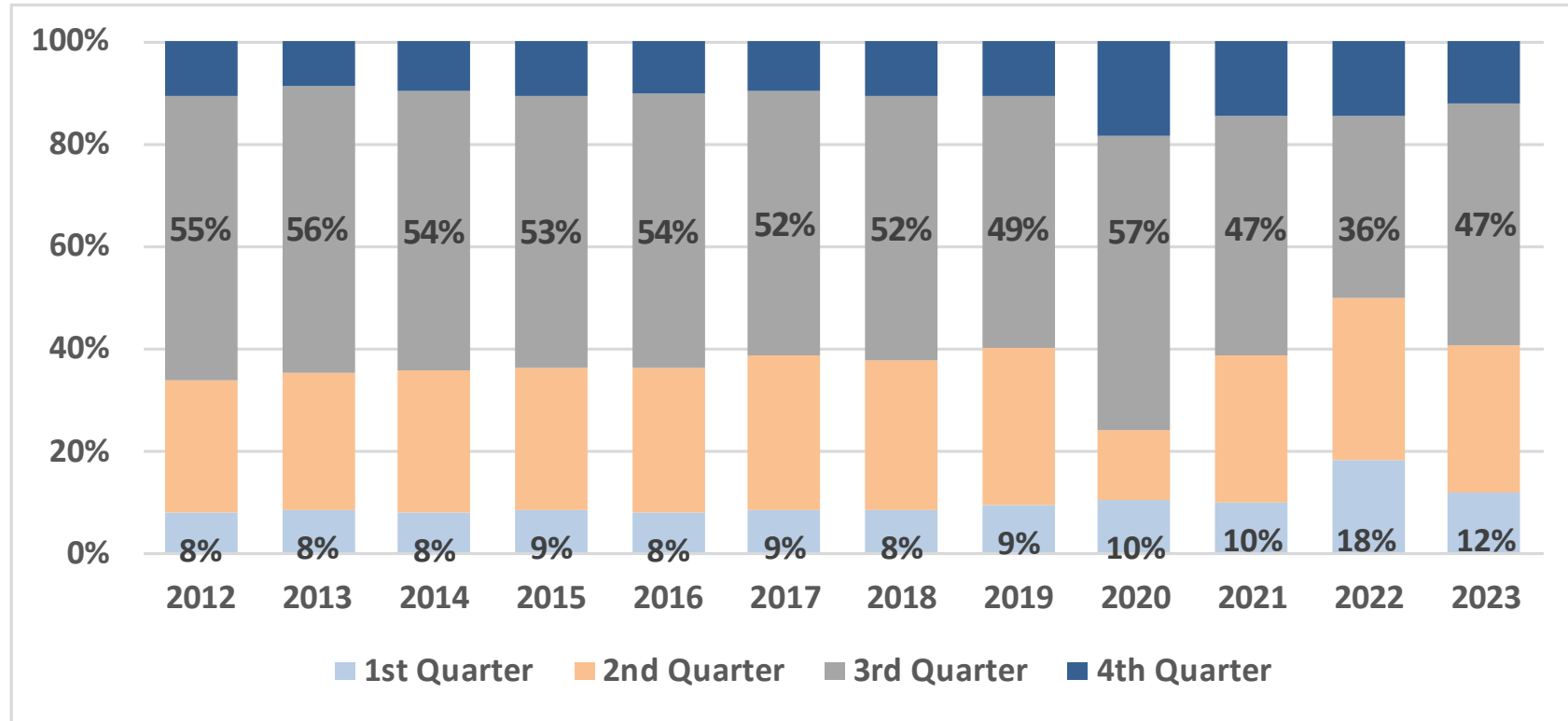
- In 2022, nonresident visitors to Yellowstone Country spent an estimated \$337 million in the county, contributing \$396 million in total economic output.
- Park County ranked 6th in nonresident spending in 2022.



Grau, Kara, "Montana Travel Region & Counties - Economic Contribution of 2021/2022 Averaged Nonresident Travel Spending" (2023). Institute for Tourism and Recreation Research Publications. 446.

https://scholarworks.umt.edu/itrr_pubs/446

QUARTERLY LODGING FACILITY USE TAX (4%) IN PARK COUNTY



- On average, 51% of Park County bed tax is collected in the 3rd Quarter (July-Sept).
- On average, 10% of Park County bed tax is collected in the 1st Quarter (Jan-Mar).

BrandMT- Lodging Facility Use Tax: <https://brand.mt.gov/Programs/Office-Of-Tourism/Lodging-Facility-Use-Tax>

SCENARIO IMPACTS

Scenario 1: Status Quo (No plowing)

Current Visitation:

No change, expect 16% of total revenue to be collected in winter season.

New Visitation:

Increasing potentially at an average rate of 1-2% but only from traditional markets.

Scenario 2: Plowing WITHOUT any replacement trails/parking

Current Visitation:

Net reduction of 20.5% of current winter visitors.

New Visitation:

Additional visitors are likely from Park County, WY area. However, 3,000+ groups would be needed to offset losses.

Scenario 3: Plowing WITH replacement trails/parking

Current Visitation:

Net reduction of 2.5% of current winter visitors.

New Visitation:

Additional visitors are likely from the Park County, WY area. Only 300 groups would be needed to offset losses.



CONCLUSION & KEY TAKEAWAYS

KEY FINDINGS



If changes are going to be made, all data points to opening Highway 212 WITH replacement trails and additional parking as the best solution forward.




Protecting the winter experience is very important. Failing to protect the winter experience will lead to a loss of current winter visitation.




Additional social and infrastructure considerations are needed with any option. (E.g., emergency services, road maintenance costs, etc.)

KEY FINDINGS

Communication and PR around this topic is critical to convey the right message to visitors and residents.



Local business owners and those who live in Cooke City year-round have special considerations that should be considered when putting a plan into place.



This topic is difficult to navigate within the community, but there are areas of compromise.

THANK YOU!

- Thank you to Robin and Ryan for facilitating this study.
 - We're grateful for your support and involvement throughout the process!
- Thank you to our steering committee who provided useful context for on-the-ground issues and helped vet the questions prior to them being asked of visitors and residents.



THANK YOU!



RRC Associates

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