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The Montana Nonresident Visitor: A Comparison of Glacier, Yellowstone, and Non-Park Visitors

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The Montana Nonresident Visitor

A Comparison of Glacier, Yellowstone, and Non-Park Visitors

Research Report 2002-10

September 2002

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by

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Executive Summary

The Montana Nonresident Visitor: A Comparison of Glacier, Yellowstone, and Non-Park Visitors

This report is based on a four-month study period (June through September, 2001) of nonresident visitors to Montana who were intercepted at gas station, airports, and rest areas. Questionnaires were handed to 7,362 groups with a resulting 40 percent response rate. The results in this report are based on further analysis of the nonresident data found in the summer report at www.forestrv.umt.edu/itr, RR 2002-5, April 2002.

For this analysis, the data set was divided into four groups of visitors. The data show that:

- * 14 percent of nonresident summer visitors visited Glacier National Park only.
- * 18 percent of nonresident summer visitors visited both parks.
- * 30 percent of nonresident summer visitors visited Yellowstone National Park only.
- * 38 percent of nonresident summer visitors did not visit either park.

Similarities Among Visitor Groups (Glacier, Yellowstone, both parks, or non-park visitors)

- * Park visitors and non-park visitors spent the greatest number of overnights at hotels/motels (40-51% of overnights).
- * Nearly one-fifth of each group flew on some portion of their trip.
- * The information source used the most for planning for all visitors was the Internet followed by auto clubs.
- * Visitors came as couples more than any other group type followed by families. Non-park visitors had the largest proportion of single travelers of all the groups.
- * Park visitors were similar in their activities (picnicking, camping, day hiking, wildlife watching, visiting museums/historic sites, and shopping). Visitors to both-parks also added visiting Native American and Lewis & Clark sites. Non-park visitors were less active except for participating in shopping.
- * Park visitors and non-park visitors were all satisfied with conditions in Montana, especially hospitality and service. The availability of rest areas received the most dissatisfied votes (9%-12%).
- * Road conditions were seen as improving by 44-50 percent of each group and 43-53 percent of each group said the availability of commercial lodging had improved. A range of 34-37 percent of each group indicated that the availability of travel information had improved over time.
- * Some conditions in Montana were viewed as changing for the worse by a few respondents in each group: Amount of open space (17-27%), condition of the natural environment (10-13%), and amount of wildlife viewing opportunities (7-12%).

Differences Between Visitor groups (Glacier, Yellowstone, both parks, and non-park visitors)

- * A greater proportion of Glacier National Park visitors were more likely to be from western states/provinces compared to Yellowstone and non-park visitors. Visitors to both parks had a higher portion of people from far-away states (FL, PA, GA, TX) than other groups. Non-park visitors were more likely to be from the surrounding states. Yellowstone-only visitors represented the widest range of states/provinces of all visitor groups.
- * Park visitors were more likely to be in Montana for vacation (88-89%) compared to non-park visitors (47%). Non-park visitors were passing through the state (40%) or here to visit friends/relatives (34%).
- * Non-park visitors were more inclined to spend nights at homes of friends/relatives (28% compared to 10-13% for park visitors).
- * Yellowstone National Park visitors who flew were most likely to rent a car (23% compared to 11% of non-park visitors).
- * Non-park visitors were most likely not to use any planning information sources (53% compared to 23-30% of park visitors).
- * Visitors to Glacier National Park and to both parks stayed the longest in the state (6.12 and 6.95 nights respectively) followed by non-park visitors (4.27 nights) and visitors to Yellowstone (4.03 nights).

- * People who only spent a day in Montana were more likely to be Yellowstone National Park-only visitors (11.6%) or non-park visitors (13.2%) compared to visitors to Glacier (3.1%) and both parks (2.5%).
- * Visitors to the parks had higher income levels than non-park visitors.
- * First-time visitors to Montana were either visiting Yellowstone National Park (33%) or both parks (35%) compared to only 13 percent first-time non-park visitors and 18 percent Glacier National Park visitors.
- * Thirty-four percent of Yellowstone National Park visitors were traveling with children under 18 compared to only 19 percent of non-park visitors, 21 percent of Glacier Park visitors, and 25 percent for both parks.
- * Hiring an outfitter while in Montana was participated in by visitors to Glacier (9%) or visitors to Yellowstone (8%) but less likely by both-park visitors (4%) or non-park visitors (3%).
- * Visitors to both parks were the most active group, participating in greater proportions of activities than any other group.
- * Glacier Park and both-park visitors were 20 percent more likely to participate in day hiking than Yellowstone visitors and 40 percent more likely than non-park visitors.
- * Forty-nine percent of Glacier National Park visitors and visitors to both parks also visited Flathead Lake but only 3 percent of Yellowstone Park and 5 percent of non-park visitors went to the Flathead Lake area.
- * Twenty-three percent of both-park visitors and 19 percent of Yellowstone-only visitors also visited Little Bighorn Battlefield compared to 8-9 percent of Glacier and non-park visitors.
- * Visits to other sites in Montana were more common among visitors to both parks than any other group. Besides visiting Glacier and Yellowstone, this group visited Flathead Lake (49%), Little Bighorn Battlefield (23%), National Bison Range (17%), Lewis & Clark Interpretive Center (13%), Missouri Headwaters State park (12%), Gates of the Mountains and Bighorn Canyon National Recreation Area (10% each).

The Montana Nonresident Visitor

A Comparison of Glacier, Yellowstone, and Non-Park Visitors

Introduction

The purpose of this report is to identify the characteristics of nonresident visitors to Montana who visit Glacier National Park, Yellowstone National Park, both parks, or neither park. A park visitor is someone who indicated on the 2001 summer nonresident survey that they visited Glacier National Park and/or Yellowstone National Park or neither of the parks. Data for this report was taken from the nonresident summer visitor survey which represents visitation during June, July, August and September. For the full summer visitor report see "Nonresident Summer Visitor Profile: A study of summer visitors to Montana," RR 2002-5, April 2002 at www.forestry.umt.edu/itr.

This report provides the profile of nonresident visitors to Montana who visited one or both of the national parks or neither park. Visitors are analyzed and described according to the following categories:

- 1) Nonresident Montana visitors who visited Glacier National Park only
- 2) Nonresident Montana visitors who visited Yellowstone National Park only
- 3) Nonresident Montana visitors who visited both Yellowstone and Glacier National Parks.
- 4) Nonresident Montana visitors who did not visit either national park.

Methodology

Study Population

Travelers to Montana during the summer of 2001 (June-September) were examined for this study. The population of travelers was defined as those persons who entered Montana by private vehicle or commercial air carrier during the study period and whose primary residence was not in Montana at the time. Specifically excluded from the study were those persons who entered Montana on a roadway while traveling in a plainly marked commercial vehicle (e.g. scheduled or chartered bus or a semi truck). Also excluded were those travelers who entered Montana by train, and out-of-state college students living in Montana for educational purposes (they were considered residents). Other than these exclusions, the study attempted to assess all types of travel to the state including travel for pleasure, business, passing through, or any other reason.

Population Estimation Model

The population estimation model was designed to identify all members of the study population by entry location and month of entry into the state. Entry locations included highway border crossings and major airports. Thirty-nine roadway locations were considered entry points into the state (i.e., Interstates, primary and secondary highways, and minor roads), in addition to airports in the following cities: Billings, Bozeman, Butte, Great Falls, Helena, Kalispell, Missoula and West Yellowstone.

The method used to estimate the nonresident travel population was two-fold. First, traffic counts at all Montana borders/entry points were obtained from secondary sources for each month of the study. These sources include:

- * Helena Regional Airport Authority: Monthly Passenger Deboarding Report by Airport.
- * Montana Department of Transportation, Planning and Statistics Bureau: Monthly Comparative Automatic Traffic Recorder Data Report.
- * Montana Department of Transportation, Planning and Statistics Bureau: Biannual Traffic by Sections Report.
- * Idaho Transportation Department: Monthly Automatic Traffic Counter Bulletin.
- * Wyoming Department of Transportation, Planning Program: Automatic Traffic Recorder Monthly Summary.
- * North Dakota Department of Transportation, Planning Division: Monthly Automatic Traffic Data.
- * The U.S. Department of Treasury, Customs Service: Monthly Canada-to-U.S. Border Crossing Statistics.

Second, surveyors identified resident/nonresident proportions at each entry location by observing vehicle license plates and questioning boarding air passengers at Montana airports using random sampling techniques stratified by location and time period. Travel group sizes were obtained while administering nonresident travel questionnaires to potential respondents.

Survey Methodology and Response Rates

Between June 1, 2001 and September 30, 2001, ITRR staff intercepted nonresident highway travel groups at gas stations, rest areas, and Canadian border crossings, and air travel groups at all airports. Intercepts were conducted at three Canadian borders: Port of Roosville north of Eureka, Port of Sweetgrass north of Shelby, and Port of Raymond north of Plentywood. Gas stations in the following communities were used: Libby, Kalispell, Whitefish, West Glacier, St. Mary, Missoula, Lolo, Rocker, Butte, Dillon, Helena, Great Falls, Shelby, Bozeman, West Yellowstone, Livingston, Gardiner, Lewistown, Harlowton, Laurel, Red Lodge, Bridger, Billings, Crow Agency, Miles City, Glendive, Sidney, Culbertson, Glasgow and Havre. Rest areas on all three Interstates were used as intercept locations in the summer.

When contacted, data was collected from the travel groups, including point of entry into the state, group size and type, residence of the respondent as well as residence of others traveling in their group, travel method, purpose of trip, anticipated length of stay in Montana, direction of travel, and planned exit. This "front-end" data was obtained from virtually every party contacted and thus represented a set of data unaffected by survey non-response bias. Next, the groups were asked to accept and complete a diary questionnaire of their visit to Montana and to return it by mail in a provided postage-paid envelope. During the four-month study period, 7,738 groups were contacted. Questionnaires were handed to 7,362 groups. Useable questionnaires were returned by 2,931 groups for a response rate of 40 percent. No follow-up measures (i.e., reminder postcards or replacement questionnaires) were used to increase response rate. Due to the nature of the questionnaire (i.e. diary of events as they occurred) and the nature of the methodology (i.e. no name or address information was collected from visitors), it was impossible to mail replacement questionnaires to non-respondents.

Front-end data collected from all nonresidents contacted allowed adjustments of the survey results for non-response bias and sampling error. Returned surveys were assigned relative weights based on key variables to adjust for discrepancies with the population model. These key variables included point of entry and purpose of trip.

Park and Non-Park Visitor Sample

Respondents from the summer survey were selected for this report based on their response to the question in the survey: "Which of the following sites have you or do you plan to visit on this trip in Montana?" 1. Glacier National Park 2. Yellowstone National Park.

Respondents who indicated Glacier but not Yellowstone are represented in the Glacier NP column in this report. Respondents who indicated Yellowstone but not Glacier are represented in the Yellowstone NP column. Respondents who indicated Glacier *and* Yellowstone National Parks are represented in the Both Parks column. Finally, respondents who indicated they did not visit either park are represented in the Non-Park visitor column.

The resultant nonresident visitor population of park and non-park visitors is represented in the following way:

- * 14 percent of nonresident summer visitors visited Glacier National Park only (420 sample size).
- * 18 percent of nonresident summer visitors visited both parks (522 sample size).
- * 30 percent of nonresident summer visitors visited Yellowstone National Park only (894 sample size).
- * 38 percent of nonresident summer visitors did not visit either park (1,141 sample size).

Results

Results of the park and non-park visitor are presented in table format in this chapter. Results are displayed in four columns each representing either park or non-park visitation. **Throughout the report, numbers that appear in bold represent one or two of the highest percentages for that column and sometimes the lowest number.**

Location of Overnight Visits

Table 1: Percent of Overnight Stays by Region and Community

Region	% Overnights spent in Region by Glacier NP Visitors*	% Overnights spent in Region by Yellowstone NP Visitors*	% Overnights spent in Region by Visitors to Both Parks*	% Overnights spent in Region by Non-Park Visitors*
Glacier Country	71%	8%	46%	22%
Yellowstone Country	5%	60%	28%	18%
Custer Country	4%	16%	7%	27%
Gold West Country	5%	13%	10%	15%
Russell Country	13%	3%	8%	13%
Missouri Country	3%	0%	1%	5%
Communities with the highest percent of overnight stays by group				
	10% West Glacier	21% W.Yellowstone	7% W.Yellowstone	16% Billings
	9% Glacier NP	9% Gardiner	7% Missoula	10% Missoula
	7% Whitefish	9% Bozeman	6% Gardiner	7% Bozeman
	6% Missoula	5% Livingston	6% St. Mary	5% Butte
	6% Great Falls	3% Red Lodge	6% Glacier NP	5% Great Falls
	5% Columbia Falls	(6% of the overnights were spent in the Park but were not included in this analysis since those are overnights in Wyoming)	5% Great Falls	4% Livingston
			5% Kalispell	3% Helena
			5% Bozeman	3% Miles City
			4% Billings	

*Percentages may not add to 100% due to rounding.

Demographic Characteristics of Park and Non-Park Visitors

Table 2: Demographics: Travel Group, Previous Visits, Children, Income*

Travelers		Glacier NP Visitors	Yellowstone NP Visitors	Visitors to Both Parks	Non-Park Visitors
Travel Group Type	Couple	44%	42%	46%	37%
	Self	12%	8%	6%	22%
	Family	30%	39%	32%	28%
	Family/Friends	6%	5%	7%	3%
	Friends	6%	5%	9%	6%
	Bus. Assoc.	1%	<1%	<1%	3%
	Org. Group	1%	1%	-	1%
Lived in MT Before?	Yes	12%	10%	12%	24%
Visited MT Before?	Yes	82%	67%	65%	87%
Number of visits in past 10 years	1	23%	22%	31%	10%
	2	18%	16%	15%	9%
	3	6%	12%	11%	10%
	4	10%	10%	9%	8%
	5	8%	7%	6%	8%
	6-10	13%	19%	17%	21%
	11-20	9%	7%	5%	15%
	21+	13%	8%	7%	21%
Seasons Visited Before	Spring	27%	21%	18%	43%
	Summer	73%	58%	60%	77%
	Fall	32%	25%	24%	47%
	Winter	25%	12%	17%	39%
Traveling with Children	Yes	21%	34%	25%	19%
Children's influence in planning	No Influence	31%	30%	28%	46%
	Some Influence	41%	40%	45%	33%
	Great Influence	28%	30%	27%	21%
Children's influence in activities	No influence	9%	9%	11%	25%
	Some Influence	56%	49%	49%	46%
	Great Influence	35%	42%	40%	30%
Travelers		Glacier Visitors	Yellowstone Visitors	Both Park Visitors	Non-Park Visitor
Household Income	Less than \$20K	4%	6%	5%	8%
	\$20K-\$39,999	16%	14%	17%	19%
	\$40K-\$59,999	25%	26%	21%	27%
	\$60K-\$79,999	19%	21%	18%	20%
	\$80K-\$99,999	13%	9%	14%	9%
	\$100,000+	22%	24%	24%	17%

* Percentages may not add to 100% due to rounding.

Table 3: Visitors Place of Residence

Travelers	Glacier NP Visitors	Yellowstone NP Visitors	Visitors to Both Parks	Non-Park Visitors
Place of Residence	10 %- ALB, CA	13% - CA	9% - CA	17% - WA
	7% - WA, ID	11% - WA	8% - FL	10% - ID
	5% - OR	7% - UT	6% - PA, WA	8% - CA
	4%- BC,CO,FL, MN	5% - AZ, TX	5% - CO, MN,	6% -MN, ND, WY
	3% -MO, ND, TX	4% - MN, ND, OR,	4% - GA, MI, TX, UT	5% - OR
	2% -AZ, IA, MI, UT, WY	3% -ID, WI, BC	3% -IL, LA, OR, WI	4% -CO, ALB
		2% - CO,IL,IN,IA, MI,MO,NY,OH, PA,WY,ALB	2% -AZ, ID, IN, VA, ALB	3% - UT 2% -AK, AZ, SD, WI,SASK

Trip Characteristics of Park and Non-Park Visitors

Table 4: Reasons for Visiting Montana

	Glacier NP Visitors <i>All</i> Reasons	Yellowstone NP Visitors <i>All</i> Reasons	Both Park Visitors <i>All</i> Reasons	Non-Park Visitors <i>All</i> Reasons
Vacation	88%	88%	89%	47%
Passing Through	20%	29%	17%	40%
Visit Family & Friends (VFR)	29%	21%	27%	34%
Business	6%	5%	4%	14%
Shopping	7%	7%	4%	7%
Other	5%	4%	8%	9%
	Glacier NP Visitors <i>Primary</i> Reason*	Yellowstone NP Visitors <i>Primary</i> Reason*	Both Park Visitors <i>Primary</i> Reason*	Non-Park Visitors <i>Primary</i> Reason*
Vacation	71%	65%	72%	27%
Passing Through	9%	19%	8%	32%
Visit Family & Friends (VFR)	14%	9%	11%	21%
Business	4%	3%	<1%	12%
Shopping	<1%	2%	<1%	2%
Other	2%	3%	5%	6%

*Percentages may not add up to 100% due to rounding.

Table 5: General Trip Behavior

Travelers		Glacier NP Visitors	Yellowstone NP Visitors	Visitors to Both Parks	Non-Park Visitors
Plan to visit in next 2 yrs.	Yes	74%	73%	66%	86%
Flew on portion of trip	Yes	23%	21%	19%	18%
Rent Auto	Yes	16%	23%	20%	11%
Where rented*	Montana	51%	38%	29%	52%
	Colorado	3%	8%	11%	7%
	Idaho	4%	2%	-	2%
	Oregon	-	-	2%	-
	Utah	8%	22%	19%	4%
	Washington	20%	4%	13%	18%
	Wyoming	2%	6%	6%	5%
	Alberta	5%	<1%	1%	1%
	British Col.	-	2%	1%	-
	Other	5%	17%	17%	10%
Hired Outfitter	Yes	9%	8%	4%	3%

* Percentages may not add to 100% due to rounding.

Table 6: Accommodations and Length of Stay

Travelers		Glacier NP Visitors	Yellowstone NP Visitors	Visitors to Both Parks	Non-Park Visitors
Average Nights in MT on this trip		6.12	4.03	6.95	4.27
Most common # of nights in MT		3	1	2,3,4	2
Percent of day-trippers		3.1%	11.6%	2.5%	13.2%
If Overnight in MT, Percent of Nights Spent in Accommodation Types*	Hotel/motel/B&B	40%	48%	51%	44%
	Parking lot	4%	3%	1%	3%
	Cabin/2 nd Home	4%	7%	1%	4%
	Public Campgr.	15%	12%	14%	7%
	Private Campgr.	16%	12%	18%	10%
	VFR Home	13%	10%	11%	28%
	Rented Cabin	3%	4%	3%	1%
	Resort/Condo	6%	4%	1%	2%
	Guest Ranch	-	<1%	-	1%
	Other	<1%	1%	1%	1%

* Percentages may not add to 100% due to rounding.

Table 7: Attractions To Montana for Those who Indicated Vacation as One Reason for Trip*

	Glacier NP Visitors		Yellowstone NP Visitors		Visitors to Both Parks		Non-Park Visitors	
	All	Primary	All	Primary	All	Primary	All	Primary
Open Space/ Uncrowded Areas	38%	8%	37%	10%	44%	8%	22%	12%
Mountains/forests	61%	10%	45%	7%	63%	13%	23%	13%
Rivers/lakes	40%	1%	30%	1%	48%	1%	17%	3%
Plains/Badlands	4%	-	7%	1%	13%	<1%	5%	1%
Native Am. Culture	8%	-	8%	<1%	13%	<1%	6%	2%
Lewis & Clark sites	11%	1%	8%	1%	14%	2%	6%	2%
Montana History	8%	1%	11%	2%	12%	4%	9%	5%
Family/friends	19%	10%	16%	8%	21%	7%	21%	20%
Glacier NP	77%	56%	5%	<1%	73%	45%	6%	1%
Yellowstone NP	4%	1%	76%	54%	73%	13%	6%	2%
Wildlife	25%	1%	31%	1%	47%	1%	10%	1%
Camping	22%	<1%	17%	1%	29%	1%	11%	3%
Fishing	10%	1%	18%	5%	16%	2%	10%	7%
Hiking	29%	1%	16%	-	27%	<1%	7%	1%
Hunting	<1%	1%	1%	2%	2%	1%	2%	9%
Other Activity	8%	2%	5%	1%	6%	1%	10%	9%
Special Event	7%	3%	5%	4%	3%	1%	7%	9%

* Percentages in the *Primary* column may not add to 100% due to rounding.

Table 8: Sources of Information Used to Plan Trip*

	Glacier NP Visitors		Yellowstone NP Visitors		Visitors to Both Parks		Non-Park Visitors	
	All items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Internet	44%	35%	55%	42%	54%	31%	27%	39%
Auto Club	28%	24%	33%	26%	36%	29%	17%	23%
Travel Agency	4%	1%	5%	35	3%	3%	4%	5%
Chamber/CVB	13%	8%	12%	4%	13%	5%	5%	4%
MT Travel Planner	16%	6%	9%	4%	13%	7%	5%	6%
Nat'l Park Brochure	25%	9%	24%	8%	36%	10%	2%	2%
1-800 state Number	3%	2%	1%	<1%	3%	1%	1%	<1%
Guide Book	14%	7%	15%	8%	21%	11%	8%	10%
Private Business	12%	5%	9%	5%	9%	3%	7%	12%
None of these Sources	28%	-	21%	-	20%	-	53%	-

* Percentages in the *Most Useful* column may not add to 100% due to rounding.

Table 9: Sources of Information Used While in Montana

	Glacier NP Visitors		Yellowstone NP Visitors		Visitors to Both Parks		Non-Park Visitors	
	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Info center person	37%	37%	29%	31%	43%	40%	15%	15%
Billboards	11%	4%	11%	4%	13%	2%	13%	8%
Highway Signs	34%	20%	36%	22%	38%	24%	33%	34%
Brochure Rack	38%	20%	30%	19%	38%	17%	17%	15%
Service Person	35%	20%	34%	25%	33%	17%	25%	27%
None of these Sources	28%	-	30%	-	23%	-	45%	-

Table 10: Activities Participated in While in Montana on this Trip*

	Glacier NP Visitors		Yellowstone NP Visitors		Visitors to Both Parks		Non-Park Visitors	
	All**	Primary	All	Primary	All	Primary	All	Primary
Picnicking	38%	9%	30%	7%	45%	5%	17%	8%
Camping (devlp.)	28%	9%	21%	8%	42%	15%	14%	8%
Camping (undeveloped)	11%	4%	9%	4%	11%	3%	7%	5%
Day Hiking	54%	17%	34%	12%	55%	15%	14%	6%
Golfing	14%	4%	4%	1%	6%	1%	6%	3%
Bckpacking	6%	2%	4%	<1%	5%	1%	3%	1%
Mountain Biking	4%	1%	2%	<1%	4%	1%	2%	1%
Road/tour Biking	8%	2%	4%	2%	3%	1%	1%	1%
Off Highway/ATV	3%	-	3%	-	4%	1%	2%	1%
Fishing	16%	3%	18%	6%	21%	6%	12%	7%
Motor boating	8%	2%	2%	1%	4%	1%	3%	1%
Water-skiing	4%	1%	1%	-	1%	1%	1%	<1%
Canoe/Kayaking	7%	1%	1%	<1%	7%	1%	2%	1%
Sail/Windsurf	1%	-	<1%	-	<1%	<1%	<1%	<1%
Rafting/Floating	12%	3%	6%	2%	13%	3%	4%	2%
Nature Study	18%	3%	15%	5%	17%	2%	6%	2%
Hunting	-	-	<1%	<1%	<1%	<1%	2%	1%
Wildlife watching	46%	12%	45%	17%	53%	15%	17%	7%
Sporting Event	2%	1%	2%	1%	3%	<1%	3%	1%
Gambling	12%	2%	7%	1%	10%	1%	6%	3%
Shopping	47%	10%	43%	13%	45%	6%	31%	14%
Native American	15%	2%	14%	3%	26%	4%	9%	4%
Lewis & Clark	19%	3%	15%	3%	24%	4%	9%	4%
Other History	28%	4%	33%	10%	36%	7%	17%	8%
Museums	20%	2%	22%	4%	29%	4%	13%	5%
Festivals/Events	11%	2%	10%	2%	10%	1%	12%	5%

* Percentages may not add to 100% in the due to rounding.

** Bolded items in the "All" columns represent 20% or more who participated in that activity.

Table 11: Sites Visited by Park and Non-Park Visitors

	Glacier NP Visitors	Yellowstone NP Visitors	Visitors to Both Parks	Non-Park Visitors
Glacier National Park	100%	-	100%	-
Yellowstone National Park	-	100%	100%	-
Little Bighorn Battlefield	8%	19%	23%	9%
Fort Peck Lake	5%	1%	4%	2%
National Bison Range	9%	3%	17%	1%
Flathead Lake Area	49%	3%	49%	5%
Clark Canyon Reservoir	<1%	2%	2%	2%
Gates of the Mountains	3%	3%	10%	2%
Lost Trail Pass	5%	2%	2%	1%
Bighorn Canyon Nat'l Rec. Area	4%	7%	10%	3%
Museum of the Rockies	3%	8%	8%	2%
Lewis & Clark Interpretive Center	10%	6%	13%	3%
Montana Historical Society	1%	1%	2%	2%
Pompey's Pillar	2%	4%	5%	5%
Missouri Headwaters	4%	4%	12%	4%
Lemhi Pass	2%	2%	2%	1%
CM Russell Nat'l Wildlife Refuge	4%	2%	6%	1%
Lolo Pass Interpretive Center	4%	2%	5%	3%

*Bolded items represent 10% or more who visited the site

Trip Satisfaction of Nonresident Montana Visitors

Table 12: Satisfaction with Montana Condition as seen by Glacier National Park Visitors

Total number of responses per statement ranged from 295 to 402	Mean*	% Satisfied	% Neutral	% Dissatisfied
Road Conditions	1.26	79%	16%	5%
Directional Signage	1.20	82%	17%	2%
Hospitality & Service	1.12	88%	12%	-
Commercial Lodging Availability	1.30	75%	20%	5%
Availability of Highway Rest Areas	1.50	61%	28%	11%
Condition of Natural Environment	1.18	86%	11%	4%
Amount of Roadside Historical Information	1.34	68%	30%	2%
Availability of Travel Information	1.27	75%	22%	3%

*1=Satisfied, 2=Neutral, 3=Dissatisfied

Table 13: Satisfaction with Montana Condition as seen by Yellowstone National Park Visitors

Total number of responses per statement ranged from 670 to 840	Mean*	% Satisfied	% Neutral	% Dissatisfied
Road Conditions	1.28	77%	18%	5%
Directional Signage	1.20	82%	16%	2%
Hospitality & Service	1.10	91%	9%	-
Commercial Lodging Availability	1.24	79%	18%	3%
Availability of Highway Rest Areas	1.47	62%	29%	9%
Condition of Natural Environment	1.13	89%	9%	2%
Amount of Roadside Historical Information	1.26	77%	18%	5%
Availability of Travel Information	1.30	82%	16%	2%

*1=Satisfied, 2=Neutral, 3=Dissatisfied

Table 14: Satisfaction with Montana Conditions as seen by Visitors to Both National Parks

Total number of responses per statement ranged from 394 to 497	Mean*	% Satisfied	% Neutral	% Dissatisfied
Road Conditions	1.24	80%	16%	4%
Directional Signage	1.20	84%	12%	4%
Hospitality & Service	1.06	94%	5%	1%
Commercial Lodging Availability	1.17	84%	14%	2%
Availability of Highway Rest Areas	1.52	59%	30%	11%
Condition of Natural Environment	1.11	91%	6%	3%
Amount of Roadside Historical Information	1.32	70%	29%	2%
Availability of Travel Information	1.26	76%	21%	2%

*1=Satisfied, 2=Neutral, 3=Dissatisfied

Table 15: Satisfaction with Montana Conditions as seen by Non-Park Visitors

Total number of responses per statement ranged from 761 to 1010	Mean*	% Satisfied	% Neutral	% Dissatisfied
Road Conditions	1.33	75%	18%	8%
Directional Signage	1.19	84%	12%	3%
Hospitality & Service	1.14	87%	12%	1%
Commercial Lodging Availability	1.28	76%	21%	4%
Availability of Highway Rest Areas	1.50	61%	27%	12%
Condition of Natural Environment	1.16	87%	11%	3%
Amount of Roadside Historical Information	1.39	64%	33%	3%
Availability of Travel Information	1.37	66%	32%	2%

*1=Satisfied, 2=Neutral, 3=Dissatisfied

Changes Seen by Nonresident Montana Visitors

Table 16: Changes in Montana as seen by Glacier National Park Visitors

Total number of responses per statement ranged from 189 to 282	Mean*	% Better	% Same	% Worse
Road Conditions	1.61	44%	51%	5%
Directional Signage	1.67	33%	67%	-
Hospitality & Service	1.65	5%	63%	1%
Commercial Lodging Availability	1.48	53%	46%	1%
Availability of Highway Rest Areas	1.75	28%	69%	3%
Condition of Natural Environment	1.86	25%	64%	11%
Amount of Roadside Historical Information	1.76	25%	74%	1%
Availability of Travel Information	1.63	37%	62%	1%
Amount of Wildlife Viewing Opportunities	1.94	19%	69%	12%
Recreation Opportunities	1.56	45%	54%	1%
Amount of Open Space	2.09	11%	68%	21%
Camping Availability	1.75	32%	61%	7%

*1=better condition, 2=same condition , 3=worse condition

Table 17: Changes in Montana as seen by Yellowstone National Park Visitors

Total number of responses per statement ranged from 280 to 448	Mean*	% Better	% Same	% Worse
Road Conditions	1.63	44%	49%	7%
Directional Signage	1.70	31%	68%	1%
Hospitality & Service	1.72	30%	69%	2%
Commercial Lodging Availability	1.57	46%	50%	4%
Availability of Highway Rest Areas	1.83	23%	72%	6%
Condition of Natural Environment	1.92	21%	66%	13%
Amount of Roadside Historical Information	1.78	24%	74%	2%
Availability of Travel Information	1.65	36%	64%	1%
Amount of Wildlife Viewing Opportunities	1.92	20%	68%	12%
Recreation Opportunities	1.77	27%	70%	4%
Amount of Open Space	2.20	7%	66%	27%
Camping Availability	1.97	17%	69%	14%

*1=better condition, 2=same condition, 3=worse condition

Table 18: Changes in Montana as seen by Visitors to Both National Parks

Total number of responses per statement ranged from 172 to 270	Mean*	% Better	% Same	% Worse
Road Conditions	1.59	44%	52%	4%
Directional Signage	1.73	28%	70%	1%
Hospitality & Service	1.76	25%	74%	1%
Commercial Lodging Availability	1.57	44%	56%	1%
Availability of Highway Rest Areas	1.81	22%	75%	3%
Condition of Natural Environment	1.95	16%	73%	11%
Amount of Roadside Historical Information	1.74	26%	74%	-
Availability of Travel Information	1.66	34%	66%	-
Amount of Wildlife Viewing Opportunities	1.81	26%	67%	7%
Recreation Opportunities	1.67	35%	64%	2%
Amount of Open Space	2.08	9%	74%	17%
Camping Availability	1.77	27%	68%	5%

*1=better condition, 2=same condition, 3=worse condition

Table 19: Changes in Montana as seen by Non-Park Visitors

Total number of responses per statement ranged from 457 to 835	Mean*	% Better	% Same	% Worse
Road Conditions	1.57	50%	44%	7%
Directional Signage	1.71	29%	71%	-
Hospitality & Service	1.83	20%	77%	3%
Commercial Lodging Availability	1.58	43%	55%	2%
Availability of Highway Rest Areas	1.81	25%	69%	6%
Condition of Natural Environment	1.90	20%	69%	10%
Amount of Roadside Historical Information	1.78	22%	77%	1%
Availability of Travel Information	1.64	37%	62%	1%
Amount of Wildlife Viewing Opportunities	1.94	18%	70%	12%
Recreation Opportunities	1.72	33%	62%	5%
Amount of Open Space	2.14	8%	70%	22%
Camping Availability	1.88	21%	70%	9%

*1=better condition, 2=same condition, 3=worse condition

Table 20: Summary Table of Average Response to Changes in Montana*

	Visitors to Glacier	Visitors to Yellowstone	Visitors to Both Parks	Non-park Visitors
Road Conditions	1.61	1.63	1.59	1.57
Directional Signage	1.67	1.70	1.73	1.71
Hospitality & Service	1.65	1.72	1.76	1.83
Commercial Lodging Availability	1.48	1.57	1.57	1.58
Availability of Highway Rest Areas	1.75	1.83	1.81	1.81
Condition of Natural Environment	1.86	1.92	1.95	1.90
Amount of Roadside Historical Information	1.76	1.78	1.74	1.78
Availability of Travel Information	1.63	1.65	1.66	1.64
Amount of Wildlife Viewing Opportunities	1.94	1.92	1.81	1.94
Recreation Opportunities	1.56	1.77	1.67	1.72
Amount of Open Space	2.09	2.20	2.08	2.14
Camping Availability	1.75	1.97	1.77	1.88

*1=better condition, 2=same condition, 3=worse condition

Categorized Visitor Comments

Table 21: Comments by All Visitors*

	Glacier NP Visitors	Yellowstone NP Visitors	Visitors to Both Parks	Non-Park Visitors
General positive comments	74	129	104	118
Montana has nice scenery	58	79	78	75
Comments about specific sites	39	75	19	61
Would like to return	28	79	50	57
Miscellaneous	23	58	2	63
Montana has nice people	22	34	48	35
Highways/roads	3	26	26	48
Specific suggestions	16	32	20	32
Have been here before	18	26	10	44
Would like to move to Montana	7	19	14	13
Rest areas	8	13	4	24
Lived or grew up in Montana	3	4	7	27
Cleanliness	21	8	9	5
Information	3	7	2	13
Openness/uncrowdedness of Montana	6	9	2	7
Prices	5	6	1	10
Public access	2	6	1	6
Sales tax	-	6	3	3
Speed limit	3	2	2	5
Own property in Montana	1	1	-	6
Shopping	4	-	58	1

*These were responses to an open-ended request for comments submitted by respondents who chose to write in the space available on the survey. The column numbers represent the "N" for that comment.

Summary, Comparisons, & Recommendations

Summary and Comparisons

For this report, Visitors to Montana were divided into four groups based on visitation to Glacier or Yellowstone National Parks. Nonresidents who only visited Glacier National Park represented 14 percent of Montana's summer visitation while 30 percent of summer nonresidents visited Yellowstone National Park only. Eighteen percent of Montana's nonresident summer visitors went to both Yellowstone and Glacier National Parks but the largest single group of nonresident visitors (38%) did not visit either park.

Summary

Glacier National Park Visitors:

- * These visitors spent 6.12 nights in Montana on average and only 3 percent were on a day trip in Montana.
- * Seventy-one percent of overnights were spent in Glacier Country Travel Region.
- * Forty-three percent came from the western states/provinces of Alberta, California, Washington, Idaho, Oregon, and British Columbia.
- * Eighty-two percent had visited Montana before and 12 percent had lived in Montana.
- * Forty-four percent traveled as couples, and 30 percent traveled as a family group but only 21 percent of them had children under 18 on the trip.
- * Vacation was the purpose for being in Montana for 88 percent of these visitors.
- * Twenty-three percent flew on a portion of their trip and 16 percent of those people rented cars, mostly in Montana or Washington.
- * Nine percent hired an outfitter while in Montana.
- * Visitors were attracted to Montana for Glacier National Park (77%), mountains/forests (61%), rivers/lakes (40%), open space/uncrowded areas (38%), hiking (29%), and wildlife (25%).
- * Forty-four percent used the Internet for Montana travel information followed by 28 percent who used an auto club.
- * The information center person was the most useful information sources used while in Montana (37%) followed by highway signs, brochure rack, and service personnel (20% each).
- * Glacier National Park visitors also visited Flathead Lake (49%), Lewis & Clark Interpretive Center (10%), National Bison Range (9%), and Little Bighorn Battlefield (8%).
- * At least one-fifth of nonresident summer visitors who visited Glacier went picnicking, camping, day hiking, wildlife watching, shopping, and visited Montana historical sites and museums.
- * Visitors were most satisfied with the hospitality and service in Montana and expressed the most dissatisfaction with the availability of rest areas.
- * Conditions viewed as improving the most over time by visitors were the availability of commercial lodging (53%), recreation opportunities (45%), and road conditions (44%).
- * Conditions that some viewed as worsening over time included amount of open space (21%), amount of wildlife viewing (12%), and condition of the natural environment (11%).

Yellowstone National Park Visitors:

- * These visitors spent 4.03 nights in Montana on average. Twelve percent did not overnight in Montana.
- * Sixty percent of overnights were spent in Yellowstone Country Travel Region followed by 16 percent in Custer Country Travel Region.
- * Thirteen percent came from California and 10 percent from Washington. Yellowstone visitors represented more states/provinces than Glacier and non-park visitors.
- * Sixty-seven percent had visited Montana before and 10 percent had lived in Montana in the past.
- * Forty-two percent traveled as couples and 39 percent traveled as a family group with 34 percent bringing children under 18 on the trip.
- * Vacation was the purpose for being in Montana for 88 percent of these visitors.
- * Twenty-one percent flew on a portion of their trip and 23 percent of those people rented cars, mostly in Montana or Utah.
- * Eight percent hired an outfitter while in Montana.
- * Visitors were attracted to Montana for Yellowstone National Park (76%), mountains/forests (45%), rivers/lakes (30%), open space/uncrowded areas (37%), and wildlife (31%).
- * Fifty-five percent used the Internet for Montana travel information followed by 33 percent who used an auto club.
- * The information center person was the most useful source of information while in Montana (31%) followed by service personnel (25%) and highway signs (22%).
- * Yellowstone National Park visitors also visited Little Bighorn Battlefield (19%), Museum of the Rockies (8%), Bighorn Canyon Recreation Area (7%), and Lewis & Clark Interpretive Center (6%).
- * At least one-fifth of nonresident summer visitors who visited Yellowstone went picnicking, camping, day hiking, wildlife watching, shopping, and visiting Montana historical sites and museums.
- * Visitors were most satisfied with the hospitality and service in Montana and expressed the most dissatisfaction with the availability of rest areas.
- * Conditions viewed as improving the most over time by visitors were the availability of commercial lodging (46%), road conditions (44%), availability of travel information (36%).
- * Conditions that some viewed as worsening over time included amount of open space (27%), condition of the natural environment (13%), and the amount of wildlife viewing (12%).

Visitors to Both Glacier and Yellowstone National Parks:

- * These visitors spent 6.95 nights in Montana on average. Only 2.5 percent were on a day trip in Montana.
- * Forty-six percent of overnights were spent in Glacier Country Travel Region and 28 percent in Yellowstone Country Travel Region.
- * Visitors to both parks represented a greater proportion of states further away from Montana than other groups (FL-8%, PA -6%, GA & TX 4% each) .
- * Both-park visitors were more likely to be first time visitors to the state (35%) compared to other Montana visitors.
- * Forty-six percent traveled as couples and 32 percent traveled as a family group but only 25 percent of them had children under 18 on the trip.
- * Vacation is the purpose for being in Montana for 89 percent of these visitors.
- * Nineteen percent flew on a portion of their trip and 20 percent of those people rented cars, mostly in Montana or Utah.
- * Only four percent hired an outfitter while in Montana.
- * Visitors were attracted to Montana for Glacier and Yellowstone National Parks (73% each), mountains/forests (63%), rivers/lakes (48%), wildlife (47%), open space/uncrowded areas (44%), camping (29%), hiking (27%), and family or friends (21%).
- * Fifty-four percent used the Internet for Montana travel information followed by 36 percent who used an auto club.
- * The information center person was the most useful source of information while in Montana (40%) followed by highway signs (24%).
- * Visitors to both parks also visited Flathead Lake (49%), Little Bighorn Battlefield (23%), National Bison Range (17%), Lewis & Clark Interpretive Center (13%), Gates of the Mountains and Bighorn Canyon National Recreation Area (10% each).

- * Visitors to both parks were an active group: Day hiking (55%), wildlife watching (53%), shopping (45%), picnicking (45%), camping (42%), visited historical sites (36%), visited museums (29%), visited Native American sites (26%), visited Lewis & Clark sites (24%), and fished (21%).
- * Visitors were most satisfied with the hospitality and service in Montana and expressed the most dissatisfaction with the availability of rest areas.
- * Conditions viewed as improving the most over time by visitors were the availability of commercial lodging (44%), road conditions (44%), and recreation opportunities (35%).
- * Conditions viewed by some as worsening over time included amount of open space (17%), and condition of the natural environment (11%).

Non-Park Visitors:

- * These visitors spent 4.27 nights in Montana on average including 13 percent who did not overnight in Montana.
- * Overnight locations were spread throughout the state: 27 percent of overnights were spent in Custer Country Travel Region, 22 percent in Glacier Country, 18 percent in Yellowstone Country, 15 percent in Goldwest Country, 13 percent in Russell Country, and 5 percent in Missouri River Country.
- * Fifty-five percent came from the neighboring states/provinces including 17 percent from Washington.
- * Non-park visitors had the highest rate of repeat visits of all groups (87%), and 24 percent had lived in Montana before.
- * Thirty-seven percent traveled as couples, 22 percent traveled alone, and 28 percent traveled as a family group but only 19 percent of these had children under 18 on the trip.
- * The primary purpose for being in Montana was passing through for 32 percent, vacation for 27 percent, and visiting family and friends for 21 percent.
- * Eighteen percent flew on a portion of their trip and only 11 percent of those people rented cars.
- * Only three percent hired an outfitter while in Montana.
- * Visitors on vacation were attracted to Montana's mountains/forests (23%), open space/uncrowded areas (22%), and family/friends (21%).
- * Fifty-three percent did not use any sources of information for planning their trip while 27 percent used the Internet.
- * Forty-five percent did not use any sources of information listed while in the state. Of those who did use sources, highway signs were the most useful (34%) followed by service personnel (27%).
- * Non-park visitors did not visit many sites while in Montana. At best, 9 percent visited Little Bighorn Battlefield followed by 5 percent who visited Flathead Lake and 5 percent who visited Pompey's Pillar.
- * Non-park visitors were more likely to go shopping (31%) than any other activity.
- * Visitors were most satisfied with the hospitality and service in Montana (87%) and expressed the most dissatisfaction with the availability of rest areas (12%).
- * Conditions viewed as improving the most over time by visitors were road conditions (50%), the availability of commercial lodging (43%) and the availability of travel information (37%).
- * Conditions viewed by some as worsening over time include amount of open space (22%), amount of wildlife viewing opportunities (12%) and condition of the natural environment (10%).

Common Travel Patterns as Indicated by Overnight Stays and Place of Residence

The following discussion will highlight differences and similarities between the four groups of nonresident summer visitors to Montana.

Nonresident summer visitors to Glacier National Park had the highest propensity to stay within the travel region where the park lies (71% of overnight stays were in Glacier Country). This may be explained, in part, by where those visitors were from. For example, 43 percent of Glacier Park visitors came from western states/provinces (Alberta, California, Washington, Idaho, Oregon, & British Columbia) and did not have to travel through much of the state to arrive at the park. In addition, 31 percent of the overnight stays were in the communities adjacent to the park (Columbia Falls, West Glacier, Whitefish) or within the park itself. People visiting Glacier National Park were the smallest group of visitors (14% of

nonresident visitors to Montana), but spent 6.12 nights in Montana – only a fraction less than those who visited both national parks.

Similar but slightly different from Glacier visitors were those who visited Yellowstone National Park only. Sixty percent of their overnight stays were spent in Yellowstone Country but Custer and Gold West Countries received 16 percent and 13 percent of overnights, respectively. Residences of Yellowstone visitors represented a larger variety of states/provinces than any of the other groups, indicating that visitors to the park were not concentrated in the west like the Glacier visitors. Unfortunately, those who visited Yellowstone National Park-only represented a large portion of nonresident visitors (30%) but were in the state of Montana the shortest amount of time - approximately four nights. It is evident that the two entrances to the park, West Yellowstone and Gardiner, serve as 'fueling' spots (gasoline and groceries) for many nonresidents as seen by the high number (12%) who did not spend any nights in Montana.

Nonresidents who visited both parks spent the majority of their overnights in Glacier Country (46%), followed by Yellowstone Country (28%). Because of the distance between parks, the number of overnight stays in the communities was divided rather evenly. In fact, the data show that the two major communities between the parks where nights were spent were Missoula (7%) and Great Falls (5%). While nonresidents visiting both parks represented only 18 percent of Montana visitors, they stayed the longest in the state – nearly 7 nights. Interestingly, visitors to both parks were more likely to be first time visitors to the state (35%) compared to other Montana visitors. Also, these visitors represented larger proportions of states further away from Montana (Florida – 8%, Pennsylvania – 6%, Georgia , Michigan, and Texas – 4% each).

Finally, nonresident visitors who did not go to either Glacier or Yellowstone National Park represented the largest single group of visitors to Montana (38%) as analyzed in this report, and appear to have spent their time along the Interstate corridors more than any other group. These visitors represent overnight stays in a variety of travel regions and communities. Twenty-seven percent of non-park visitor overnights were in Custer Country (Billings received the highest number of overnights at 16%) while 22 percent of overnights were spent in Glacier Country (Missoula received 10%). With Yellowstone Country receiving 18 percent, Gold West Country receiving 15 percent and Russell Country receiving 13 percent of the overnight visits, it is evident that this group had more variety in their travel patterns than the park visitors. Non-park visitors had the highest percent of residents from nearby states/provinces (Washington – 17%, Idaho – 10%, North Dakota and Wyoming – 6% each, Oregon – 5%, Alberta – 4%). Further analysis (following sections) will also show that non-park visitors had the highest proportion of visitors simply passing through the state as well as those in Montana visiting friends and relatives.

It is important to note that even though the preceding paragraph stated that non-park visitors represented the largest single nonresident group in Montana, this could be misleading as the other three groups discussed in this report ALL represent park visitors. Hence, 62 percent or three-fifths of all nonresident summer visitors visit Glacier, Yellowstone, or both parks while only 38 percent of all summer visitors do not visit either of the parks.

Traveler Demographic and Trip Characteristics

The park visitors (Glacier, Yellowstone, or both) had more similarities than differences. Differences did show up, however when looking at non-park visitors compared to park visitors. First of all, demographic characteristics show that all groups had the largest percent of their travel group type as couples. However, couples were the group type for 37 percent of non-park visitors while couples represented park visitors 42-46 percent of the time. Non-park visitors were more likely to be alone (22% compared to 6-12% of park visitors) and less likely to be a family group (28% compared to 30-39% of park visitors). Yellowstone-only visitors had the highest percent of family groups (39%). This statistic also shows up in the data where 34 percent of Yellowstone visitors had children under 18 traveling with them, compared to only 19 percent of non-park visitors and 21 percent of Glacier Park visitors. Interestingly, one-third of the groups with children visiting parks did not feel their children had any influence in the planning of their

trip and nearly half of the non-park visitors did not feel their children had any influence on the trip planning. However, once on the trip, nearly 90 percent of the children visiting parks had an influence on their travel activities whereas only 75 percent of non-park visiting children had influence on their trip activities.

One additional demographic similarity of park visitors compared to non-park visitors was income level. Park visitors were more likely to have income levels in the range of \$40,000-\$60,000 and over \$100,000 but non-park visitors were more likely to have incomes ranging from \$40,000-\$80,000.

One-fourth of non-park visitors had lived in Montana in the past compared to 10-12 percent of the park visitors. This statistic validates the high portion of non-park visitors who are here primarily to visit family and friends in Montana (21% compared to 9-14% of park visitors). In addition, 87 percent of non-park visitors have been to Montana in the past, followed by Glacier visitors (82%), Yellowstone visitors (67%), and both-park visitors (65%). Probably because of previous residence and family/friends living in Montana, non-park visitors are more likely to visit Montana again in the next 2 years (86%). The majority of overnights were spent in hotel/motels by all visitors but non-park visitors had the highest percent of overnights in the home of friends and relatives (28%).

One-fifth or fewer of all visitors flew on a portion of their trip. Of those who flew and rented a car, the location of the car rental differed depending on park or non-park visitation. Just over half of Glacier visitors and non-park visitors who flew rented cars in Montana. In contrast, visitors to Yellowstone or to both parks were more likely to rent their cars in one of three places: Montana, Utah or "other." It is unknown where "other" represents but it does not represent any of the adjoining states/provinces or Washington, Oregon, or Colorado.

Perhaps the most significant difference between park visitors and non-park visitors is their reason for visiting Montana. Of all the park visitors, 88-89 percent said one reason was vacation. Only 47 percent of non-park visitors indicated vacation as one of their reasons for being in Montana. When asked their one primary reason for being in Montana, Glacier visitors and both-park visitors said vacation (71% and 72% respectively) followed by Yellowstone visitors (65%) and non-park visitors (27%). Nineteen percent of Yellowstone visitors were primarily in Montana to pass through (further evidence of the 'fueling' theory of Gardiner and West Yellowstone). Interestingly, when non-park visitors were asked their primary reason for being in Montana, a full 32 percent were only here to pass through the state.

In planning their Montana visit, park visitors used the Internet the most, followed by information from auto clubs. In contrast, non-park visitors were more likely to NOT use any information source (of those listed on the survey). If non-park visitors did use information, the Internet was used most frequently. Similarly, non-park visitors were the least likely group to use information sources while in the state (45% did not use any sources listed), while only 23-30% of park visitors did not use in-state information. Visitors to the parks were quite even in their response to the most useful information sources while in Montana. None of these visitors rated billboards highly (2-4%), but all of the park visitors rated the remaining information sources as important. In other words, nearly an equal number of visitors thought the information center person, the service person, and the brochure racks were most useful. What this confirms is that a variety of information sources need to be available for the nonresident visitor, with the exception of billboards.

Attractions, Sites Visited, and Activities

Nonresident visitors to Montana who visited Glacier National Park only were mostly attracted to Montana for Glacier National Park (77%), mountains/forests (61%), rivers/lakes (40%), open space/uncrowded areas (38%), hiking (29%), and wildlife (25%). Yellowstone visitors were similar except that Yellowstone was the obvious attraction (76%). The only difference is that hiking did not get the number of responses that Glacier visitors reported (29% for Glacier visitors and only 16% for Yellowstone visitors). Not surprisingly, visitors to both parks indicated having visited more attractions

than any of the other groups – Glacier, Yellowstone, mountains/forests, rivers/lakes, wildlife, open space/uncrowded areas, camping, and hiking. Non-park visitors indicated the least number of reasons for being attracted to the state with family/friends the most important reason.

The most interesting data from the attractions list is from the respondents who visited both parks. While these visitors gave equal attraction status to Glacier and Yellowstone Parks (both parks received 73% of responses for an attraction), when pressed to provide their primary attraction, 45 percent said Glacier National Park and only 13 percent indicated Yellowstone was their primary attraction. This indicates that Glacier National Park is more of a draw to the state than Yellowstone *if* visitors are going to both parks. However, it is important to remember that the Yellowstone-only group still represents the highest portion of park visitors at 30 percent.

Non-park visitors were the least likely to visit sites in the state. At best, nine percent visited Little Bighorn Battlefield followed by five percent who visited Pompey's Pillar and Flathead Lake. Glacier National Park visitors also visited Flathead Lake (49%), Lewis & Clark Interpretive Center (10%), National Bison Range (9%), and Little Bighorn Battlefield (8%). Yellowstone visitors also visited Little Bighorn Battlefield (19%), Museum of the Rockies (8%), and Bighorn Canyon National Recreation Area (7%). Visitors to both parks were the most active in visiting other sites. These visitors spent time at Flathead Lake (49%), Little Bighorn Battlefield (23%), National Bison Range (17%), Lewis & Clark Interpretive Center (13%), Missouri Headwaters State Park (12%), Bighorn Canyon National Recreation Area and Gates of the Mountains (10% each), and Museum of the Rockies (8%). Again, visitors to both parks were in the state longer and were most likely to be first time visitors to Montana. It appears these visitors were trying to do more while they were in the state.

Visitors to Glacier National Park only and visitors to Yellowstone National Park only mirrored each other in terms of predominate activities engaged in while in Montana. Picnicking, camping, day hiking, wildlife watching, shopping, and visiting Montana historical sites and museums were participated in by at least one-fifth of each of the respondent groups. The main difference between these two groups is that a larger percent of Glacier National Park visitors engaged in the outdoor activities while a slightly higher proportion of Yellowstone visitors visited museums and historic sites. Day hiking by 54 percent of Glacier visitors, however, far exceeded day hiking by Yellowstone visitors (34%).

Visitors to both parks engaged in the same activities as the single-park visitor but added visiting Lewis and Clark sites and Native American sites to their activities. Visitors to both parks participated in these activities in higher numbers than visitors to one of the parks. It is evident that visitors to both parks do more and visit more sites than any other nonresident visitor to Montana. Finally, non-park visitors were less active than park visitors. The activity with the highest percent of participation was shopping at 31 percent.

Satisfaction and Changes Observed

Visitors to the parks as well as non-park visitors are quite satisfied with conditions in Montana. In fact, the lowest satisfaction was with availability of highway rest areas where only 59-62 percent were satisfied. The highest number of satisfied visitors was with Montana's hospitality and service where up to 94 percent were satisfied. It appears that visitors to Montana like what they see and get while in the state.

Visitors who had been to Montana in the past were asked to rate whether or not some conditions in the state had changed. They were asked to indicate if the condition were better, the same, or worse. When things stay the same, we feel like we are at least keeping on top of conditions in the state. When conditions are seen as better, it says that something is working well and that the effort involved should continue. However, when visitors report that conditions are worsening, it provides Montanans with the opportunity to look at what is happening and take action to address the concern.

When analyzing only the mean responses, the three park groups and the non-park group have a similar profile. All groups indicated that the availability of commercial lodging has improved the most, and all groups rated the amount of open space as the condition that has worsened the most although the latter still had a mean ranging from 2.08 to 2.14 (2 is neutral while three was worse condition). Overall, however, the majority of visitors felt that Montana conditions had improved or had remained the same. This is an encouraging finding. Therefore, when looking at the low numbers of visitors who said something had worsened, people may be tempted to ignore the findings. These numbers are a red flag, albeit small, and ignoring it would be a mistake as it is alerting the state to possible larger problems down the road.

The items where ten percent or more of the respondents said the condition had worsened were virtually the same for each of the four groups. Three conditions were mentioned: Condition of the natural environment, amount of wildlife viewing opportunities, and the amount of open space. The condition of the natural environment was seen in a worse condition by 10 percent of non-park visitors, 11 percent of Glacier and both-park visitors, and by 13 percent of Yellowstone park visitors. The amount of wildlife viewing opportunities was seen as worsening by 12 percent of Glacier, Yellowstone and non-park visitors alike. Visitors to both parks were the only ones who did not have at least 10 percent say wildlife viewing had worsened. Finally, the item with the highest number of people saying it had worsened over time was the amount of open space. Seventeen percent of both-park visitors, 21 percent of Glacier Park visitors, 22 percent of non-park visitors, and 27 percent of Yellowstone Park visitors said the amount of open space had worsened.

Recommendations

This data analysis provided the reader with a new view of nonresident visitors by virtue of their visiting a national park or not. It has been said for years that Glacier and Yellowstone National Parks are the draw for people who come to Montana. This report supports that view, showing that 62 percent of nonresident visitors to Montana visited either Glacier, Yellowstone, or both parks. Only 38 percent of nonresidents do not visit a park in the summer months of June through September.

Further analysis of the *park visitors* shows that 49 percent went to Yellowstone only, 28 percent went to both parks, and 23 percent went to Glacier only. From a marketing standpoint, Yellowstone is a big draw. The reason many people are in Montana at all is because of Yellowstone. Yes, many of them (12%) do not even spend a night, but perhaps this is the marketing opportunity. From a marketing standpoint, the regional aspect is an important component. While Yellowstone is in Wyoming for the most part, cooperative advertising with Wyoming should continue. Yellowstone National Park is famous icon for which Montana and Wyoming can, and should, be using.

The Glacier-only visitor group is an interesting phenomenon. These people tend to come from the west in greater numbers than any other area of the country. Geographic marketing to the west with Glacier as the icon is a good marketing strategy. The people who visit Glacier spend their nights in Glacier Country Travel Region and more specifically in communities adjacent to the park. These are visitors who spend their time in and around Glacier and do not extend their activities much beyond the Glacier National Park area. They are loyal to the park, they have been to Montana in the past, and three-fourths plan to return within 2 years. These people simply need to be kept happy and they will return to Montana.

First-time visitors tend to “do it all” while in Montana. They visit both parks and many places in-between. It is important for Montana to continue marketing the proximity of both parks so the potential visitor sees that it is possible to visit both. Developing travel corridors for visitors to choose from is an excellent way to promote the ease of visiting both parks.

Since the non-park visitor is more likely to be passing through the state or visiting friends and relatives, it is obvious that marketing to this group will not be very successful. Again, the draw to the state is Glacier

and Yellowstone National Parks. While it may seem redundant, and almost boring to continually mention the parks in advertising, it would be silly to ignore the fact that these parks are why people visit.

Visitors to Montana are here for the environment, the open space, and the wildlife, to name a few attractions. If Montana kills the goose that lays the golden egg, the tourism industry will suffer drastically in the future. Certainly one could say that only 10-27 percent of the visitors are saying this and that 73-90 percent are not concerned, but how many people need to show their concern before we take heed? These visitors have given us a warning. Montana has the opportunity to preserve these attractions and should be diligently looking at strategies to save the foundation for the tourism industry now and for the future.

In terms of strategies for the future, the tourism industry should support efforts to maintain open space. This in turn aids in a healthy environment which increases diversity of wildlife. Open space, a healthy environment, and wildlife are Montana's attractions. These represent the foundation of the economic stability of the tourism industry and one of the cornerstones of the state's economic structure.

Survey

