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Nonresident SPRING Visitor Profile: A study of Spring Visitors to Montana

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Nonresident *SPRING* Visitor Profile

A study of Spring Visitors to Montana

Research Report 2002-2

February 2002

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Recreation Research**

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Nonresident *Spring* Visitor Profile

by

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Executive Summary

Nonresident Spring Travelers to Montana: 2001

- ?? Nonresident visitors to Montana were intercepted at gas stations, rest areas, and airports in April and May 2001. There were 1,453 initial interviews conducted. 1,354 visitors accepted the mail-back survey and 554 returned the survey for a 41% response rate.
- ?? The most common primary purpose for visiting Montana was passing through (47%) followed by vacation (23%), visiting friends and relatives (14%) and business (11%).
- ?? The "typical" nonresident spring visitor spent \$95.98/day, stayed 3.04 nights, had 1.97 people in their travel party and a household income of \$40,000-\$60,000.
- ?? Visitors were most likely to be from Washington (12%), Idaho (10%), North Dakota (9%), and Wisconsin (8%). Eighty-one percent had been to Montana in the past and 87 percent planned to visit again in the next 2 years.
- ?? Vacationers, those visiting friends and relatives, and those passing through the state tended to travel as couples, while people in Montana on business tended to travel alone.
- ?? Only 10 percent of all spring visitors were traveling with children under 18 and most of those visitors were here to visit friends and relatives.
- ?? Vacationers visited Yellowstone National Park (47%), Glacier National Park (47%), Little Bighorn Battlefield (34%) and the Flathead Lake area (28%). People visiting friends/ relatives did not tend to visit any sites surveyed, however, the most visited site for this group was Yellowstone National Park (13%). People passing through the state visited Yellowstone National Park (23%) and Little Bighorn Battlefield (20%). Business travelers visited Flathead Lake (19%), Yellowstone National Park (18%), and Glacier National Park (15%).
- ?? Eighteen percent of spring visitors flew for part of their trip. Those who drove stayed on the Interstates. Interstate 90 between Billings and Bozeman was the most traveled road segment in the state with 35-45 percent traveling that area. Interstate 94 between Billings and Miles City was traveled by 24-30 percent of visitors. The north-south corridor traveled most was I-15 between Butte and Monida Pass (9-12%). The two-lane road with the highest volume of nonresident travel (14%) was US89 from Livingston to Gardiner.
- ?? Glacier Country Travel Region accommodated more overnights (29%) than any other travel region, but visitors stayed overnight in Billings (17%) more often than in any other community in the state.
- ?? In pre-trip planning, 45 percent of visitors did not use any of the information sources listed in the questionnaire. Those who did, felt the Internet (39%) and auto clubs (23%) provided the most useful information. Information used while in the state came mostly from service people (30%) or from highway signs (28%).
- ?? Vacationers participated in more activities than other visitor types. Forty-five percent visited historic sites, 48% camped, 33% day hiked, and 31% shopped. Those visiting friends and relatives shopped (59%), day hiked (19%), and visited historic sites (19%). People passing through the state or on business did not engage in many activities at all.
- ?? Visitors were satisfied with all of the eight travel conditions listed (road conditions, directional signs, hospitality, commercial lodging availability, availability of rest areas, condition of the natural environment, amount of roadside historical info, and availability of travel information). However, rest areas received the greatest amount of dissatisfied votes (10%).
- ?? Eighteen percent of returning nonresidents believe that the amount of open space has decreased over time, yet a high number of nonresidents were attracted to Montana because of the open space and uncrowded areas (23% of all travelers and 40% of vacationers).

Nonresident *Spring* Visitor Profile

A Study of Spring Visitors to Montana

Introduction

The purposes of this study were to assess characteristics of nonresident spring visitors to Montana, to determine spring travel patterns, and to update visitor estimation figures for the state of Montana. A spring visitor for this study is defined as a nonresident who traveled in Montana anytime during the two spring months of April and May 2001.

This spring report is one component of the year-round nonresident visitor study to Montana. The objectives of the year-round study were to:

- ?? Describe visitors to Montana in terms of demographics, trip characteristics, travel behavior, and expenditures in the state.
- ?? Determine the economic impact of travelers to Montana.
- ?? Determine the main attractions to the state (including Lewis and Clark attractions).
- ?? Update information used in ITRR's model to estimate annual visitation to the state and associated economic impacts.

This report provides the profile of nonresident visitors to Montana in the spring. Visitors are analyzed and described according to the following categories:

- 1) All spring visitors are analyzed as one group.
- 2) The primary purpose for visiting Montana is analyzed and compared to other purposes.

Methodology

Study Population

Travelers to Montana during the spring of 2001 (April and May) 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 the following airports: Billings, Bozeman, Butte, Great Falls, Helena, Kalispell, and Missoula.

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 Highways, 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 April 1, 2001 and May 31, 2001, ITRR staff intercepted nonresident highway travel groups at gas stations 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. A variety of gas stations around the state in 25 communities were used for intercept locations during the spring study. Gas stations in the following communities were used: Libby, Kalispell, Whitefish, Missoula, Lolo, Rocker, Butte, Dillon, Helena, Great

Falls, Shelby, Bozeman, West Yellowstone, Livingston, Gardiner, Laurel, Red Lodge, Bridger, Billings, Crow Agency, Miles City, Glendive, Sidney, Culbertson, and Glasgow. Rest areas on all three Interstates were used to intercept visitors in the spring.

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 two-month study period, 1,453 groups were contacted. Questionnaires were handed to 1,354 groups. Useable questionnaires were returned by 554 groups for a response rate of 41 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.

Results

The results of the spring survey are presented in table format as much as possible in this section. Results will show all respondents in one column followed by a 'breakdown' of the data by primary reason for visiting. **Throughout the report, numbers that appear in bold represent one or two of the highest percentages for that column and sometimes the lowest number.**

ALL visitors

Table 1: Trip Expenditures – Spring 2001

		All Travelers
Total # of Spring Groups		579,300
Group Size		1.97
# Of Nights in MT		3.04
Average Daily Expenditures		\$95.98
Total Spring Expenditures		\$169,028,000
Expenditure Distribution	Restaurant/Bar	\$18.23
	Gas/oil	\$27.44
	Retail	\$15.35
	Hotel/motel	\$18.39
	Groceries/snacks	\$5.72
	Auto Rental/repair	\$3.15
	Misc. Services	\$0.92
	Transportation	\$0.84
	Entrance fees	\$2.27
	Outfitter/guide	\$2.58
	Camping	\$1.08

Table 2: Percent of Overnight Stays by Region

Region	% Overnights spent in Region
Glacier Country	29%
Custer Country	25%
Yellowstone	21%
Gold West Country	11%
Russell Country	10%
Missouri Country	4%

Table 3: Percent of Overnight Stays for Selected Communities

Region	City	% Of all overnights
Glacier Country (29%)	Missoula	10%
	Kalispell	5%
	Whitefish	1%
	Big Fork	>1%
	Hamilton	>1%
	West/East Glacier	4%
	Glacier National Park	-
Gold West Country (11%)	Butte	4%
	Helena	2%
	Dillon	2%
	Virginia City	-
Russell Country (10%)	Great Falls	3%
	Shelby	1%
	Havre	>1%
	Lewistown	1%
Yellowstone Country (20%)	Bozeman	9%
	West Yellowstone	>1%
	Big Sky	1%
	Red Lodge	>1%
	Yellowstone NP	1%
	Gardiner	3%
Custer Country (25%)	Billings	17%
	Hardin	3%
	Miles City	1%
	Glendive	2%
Missouri River Country (4%)	Sidney/Fairview	2%
	Plentywood	-
	Glasgow	1%

Table 4: Percent of Nonresidents on Specific Highway Segments*

Travelers		All Travelers	Travelers		All Travelers
WEST-EAST			NORTH-SOUTH		
I-90	ID Border to Missoula	25-34%**	I-15	Canada to Shelby	7%
	Missoula to Butte	29-31%		Shelby to Great Falls	7-10%
	Butte to Bozeman	27-34%		Great Falls to Helena	6-8%
	Bozeman to Billings	35-45%		Helena to Butte	6%
	Billings to WY Border	21-23%		Butte to ID Border	9-12%
1-94	Billings to Miles City	24-30%	US93	Canada to Kalispell	3-5%
	Miles City to Glendive	31%		Kalispell to Polson	6-8%
	Glendive to ND Border	21-28%		Polson to Missoula	8%
US2	ID Border to Kalispell	3-5%	US191	Missoula to ID Border	2-4%
	Kalispell to Shelby	4-9%		Bozeman to Big Sky	7%
	Shelby to Glasgow	3-6%		Big Sky to W. Yellowstone	7%
	Glasgow to ND Border	3-5%		Lewistown to I90	2-4%
MT200	Missoula to Lewistown	2-5%	US59	West Yellowstone to Madison Junction	4%
	Sidney to ND Border	9%		Miles City to WY Border	2%
US12	White Sulphur Springs to Forsyth	5-7%	US287	Norris to Ennis to Hwy87	2-4%
MT16	Sidney to Glendive	11%	US89	White Sul. Springs to I90	5%
US310	Rockvale to WY Bord.	4-8%		Livingston to Gardiner	14%
				Gardiner to Norris Geyser	4%

*Not all respondents answered the travel route portion of the survey since it required tracing their route on a provided map.

**The ranges represent more than one road segment between the two points highlighted, e.g. the stretch of road between the Idaho border to Missoula has adjoining roads where travelers could access or leave this stretch before arriving in Missoula. The ranges show the highest and lowest numbers on this portion of the road.

Trip Satisfaction and Changes Noted by *Spring* Visitors

Table 5: Satisfaction with Montana Conditions

Total number of responses per statement ranged from 392-571	Mean*	% Satisfied	% Neutral	% Dissatisfied
Road Conditions	1.35	73%	20%	8%
Directional Signage	1.16	86%	13%	2%
Hospitality & Service	1.17	85%	14%	2%
Commercial Lodging Availability	1.18	83%	16%	1%
Availability of Highway Rest Areas	1.50	59%	31%	10%
Condition of Natural Environment	1.11	89%	10%	1%
Amount of Roadside Historical Information	1.38	64%	34%	2%
Availability of Travel Information	1.39	64%	32%	3%

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

**Bold items represent the highest and lowest score on these questions

Table 6: Changes Seen Over Time by Returning Visitors

Total number of responses per statement ranged from 231-415	Mean*	% Better	% Same	% Worse
Road Conditions	1.63	33%	34%	6%
Directional Signage	1.73	28%	72%	1%
Hospitality & Service	1.81	20%	79%	1%
Commercial Lodging Availability	1.61	40%	60%	1%
Availability of Highway Rest Areas	1.85	22%	70%	8%
Condition of Natural Environment	1.85	23%	70%	8%
Amount of Roadside Historical Information	1.75	27%	71%	2%
Availability of Travel Information	1.61	39%	61%	0%
Amount of Wildlife Viewing Opportunities	1.86	24%	66%	10%
Recreation Opportunities	1.63	39%	59%	2%
Amount of Open Space	2.03	15%	67%	18%
Camping Availability	1.76	31%	63%	6%

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

**Bold items represent the highest and lowest score on these questions per column

Demographic Characteristics of *SPRING* Visitors: All visitors and by Purpose of Trip

Table 7: Reasons for Visiting Montana

	All Reasons	Primary Reason
Passing Through	53%	47%
Vacation	43%	23%
Visit Family & Friends (VFR)	27%	14%
Business	14%	11%
Shopping	8%	1%
Other	6%	4%

Table 8: Demographic Comparison of All Spring Travel Groups and Those Categorized by Primary Reason for Visiting Montana

Travelers		ALL TRAVELERS	Vacation (23%)	Visit family/ friends (14%)	Business (11%)	Passing Through (47%)
Travel Group Type	Couple	39%	56%	44%	17%	34%
	Self	29%	17%	24%	59%	31%
	Family	20%	17%	26%	13%	21%
	Family/Friends	2%	3%	5%	-	1%
	Friends	8%	9%	2%	2%	12%
	Bus. Assoc. Org. Group	2%	-	-	10%	2%
Lived in MT Before?	Yes	17%	7%	44%	20%	8%
Visited MT Before?	Yes	81%	74%	94%	87%	75%
Number of visits in past 10 years	1	7%	21%	4%	4%	4%
	2	17%	16%	3%	15%	28%
	3	10%	21%	7%	6%	9%
	4	6%	6%	3%	3%	10%
	5	5%	1%	12%	5%	5%
	6-10	16%	10%	19%	14%	20%
	11-20	9%	5%	20%	5%	6%
21+	28%	20%	31%	48%	19%	
Seasons Visited Before	Spring	65%	53%	84%	67%	62%
	Summer	63%	50%	82%	67%	59%
	Fall	51%	40%	79%	75%	39%
	Winter	45%	29%	67%	53%	42%
Traveling with Children	Yes	10%	13%	18%	2%	8%
Children's influence in planning	No Influence	40%	46%	52%	Sample size too small to analyze further	22%
	Some Influence	32%	45%	33%		30%
	Great Influence	28%	10%	15%		49%
Children's influence in activities	No influence	33%	36%	34%		22%
	Some Influence	28%	54%	39%		5%
	Great Influence	40%	11%	27%		74%
Travelers		ALL TRAVELERS	Vacation (23%)	Visit family/ friends (14%)	Business (11%)	Passing Through (47%)
Household Income	Less than \$20K	10%	12%	11%	1%	10%
	\$20K-\$39,999	20%	20%	18%	15%	20%
	\$40K-\$59,999	22%	14%	33%	21%	26%
	\$60K-\$79,999	20%	25%	19%	18%	17%
	\$80K-\$99,999	13%	11%	7%	19%	14%
	\$100,000+	16%	20%	12%	26%	13%

Table 9: Visitors Place of Residence

Travelers	All Travelers	Vacation (23%)	Visit family/ friends (14%)	Business (11%)	Passing Through (47%)
Place of Residence	WA: 12%	WA: 18%	ID: 18%	ND: 21%	ND: 12%
	ID: 10%	WI: 11%	WY: 14%	CA: 12%	WA, WI: 10%
	ND: 9%	CA: 5%	MN: 11%	CO: 10%	ID, NY: 9%
	WI: 8%	MI: 9%	WA: 9%	WA, WI: 8%	OR,WY: 6%
	WY: 7%	OK: 8%	SD: 7%	ID: 6%	MN: 5%
	CA,MN,ALB: 5%	ID,ALB: 6%	CA, ND: 5%	WY: 5%	MI, ALB: 4%
	MI, NY, OR: 4%	IL: 5%	AK, CO,	NV: 4%	NE: 3%
	CO,IL,NE,OK, SD,TX, UT,BC: 2%	SC, MN: 4%	FL, NV: 3%	SD: 3%	AZ,CO, ME, NM, TX, BC: 2%
		OR: 3%			
		FL,VA,BC: 2%			

Trip Characteristics of **SPRING** Visitors: All Visitors and by Purpose of Trip

Table 10: General Trip Behavior

Travelers		All Travelers	Vacation (23%)	Visit Family/ Friends (14%)	Business (11%)	Passing Through (47%)
All Purposes of Trip	Vacation	43%		33%	18%	30%
	VFR	27%	18%		5%	14%
	Passing Thru	53%	26%	7%	2%	
	Business	14%	1%	2%		3%
	Shopping	8%	7%	9%	4%	5%
	Other	6%	5%	2%	11%	1%
Plan to visit in next 2 yrs.	Yes	87%	89%	94%	96%	78%
Flew on portion of trip	Yes	18%	17%	21%	37%	13%
Rent Auto?	Yes	10%	22%	9%	24%	4%
Where rented?	Montana	42%	36%	54%	79%	10%
	Colorado	-	-	-	-	-
	Idaho	3%	4%	8%	-	-
	Oregon	4%	-	-	-	21%
	Utah	1%	-	8%	-	-
	Washington	19%	36%	-	16%	-
	Wyoming	8%	-	13%	2%	22%
	Alberta	2%	-	-	-	10%
	British Col.	-	-	-	-	-
Other	21%	25%	17%	4%	38%	
Hired Outfitter	Yes	2%	7%	-	-	-

Table 11: Accommodations

Travelers		All Travelers	Vacation (23%)	Visit Family/ Friends (14%)	Business (11%)	Passing Through (47%)
Nights in MT on this trip		3.07	3.67	4.10	1.02	1.16
If Overnight in MT, Percent of Nights Spent in Accommodation Types	Hotel/motel/B&B	57%	60%	32%	84%	58%
	Parking lot	1%	-	-	-	3%
	Cabin/2 nd Home	2%	4%	1%	-	2%
	Public Campgr.	7%	8%	2%	-	18%
	Private Campgr.	14%	23%	4%	8%	12%
	VFR Home	14%	4%	56%	6%	3%
	Rented Cabin	1%	1%	2%	-	-
	Resort/Condo	1%	1%	1%	-	1%
	Guest Ranch	-	>1%	-	-	-
Other	3%	>1%	4%	-	3%	

Table 12: Spring Attractions To Montana for Those who Indicated Vacation as One Reason for Trip

	All Travelers		Vacation		VFR		Business		Pass Thru	
	All	Primary	All	Primary	All	Primary	All	Primary	All	Primary
Open Space/ Uncrowded Areas	23%	12%	40%	15%	20%	8%	There was an insufficient sample size of business travelers who were also here on vacation.		20%	9%
Mountains/forests	24%	10%	48%	11%	19%	13%		20%	8%	
Rivers/lakes	13%	2%	32%	-	12%	4%		7%	2%	
Plains/Badlands	4%	1%	4%	1%	4%	-		5%	-	
Native Am. Culture	4%	>1%	14%	-	2%	-		1%	-	
Lewis & Clark sites	6%	>1%	16%	1%	4%	-		4%	-	
Montana History	4%	4%	9%	1%	4%	-		2%	11%	
Family/friends	13%	16%	17%	5%	39%	66%		5%	11%	
Glacier Nat'l Park	14%	11%	48%	17%	5%	2%		6%	8%	
Yellowstone NP	18%	21%	46%	24%	6%	3%		14%	35%	
Wildlife	9%	4%	29%	5%	10%	-		1%	4%	
Camping	7%	1%	19%	3%	7%	-		3%	-	
Fishing	6%	4%	20%	7%	4%	3%		1%	2%	
Hiking	7%	-	18%	-	4%	-		4%	-	
Hunting	1%	4%	3%	1%	1%	-		-	-	
Snowmobiling	1%	-	1%	-	1%	-		1%	-	
Downhill skiing	4%	2%	8%	2%	2%	-		3%	-	
XC skiing	2%	-	1%	-	1%	-		3%	-	
Other Activity	5%	7%	9%	6%	3%	-		3%	11%	
Special Event	3%	2%	7%	1%	4%	3%		-	-	

Table 13: Sites Visited While in Montana on this Trip

	All Travelers	Vacation (23%)	Visit Friends/Relatives (14%)	Business (11%)	Passing Through (47%)
Glacier National Park	19%	47%	8%	15%	12%
Yellowstone National Park	25%	47%	13%	18%	23%
Little Bighorn Battlefield	19%	34%	6%	5%	20%
Fort Peck Lake	3%	2%	2%	3%	4%
National Bison Range	2%	2%	5%	1%	1%
Flathead Lake Area	13%	28%	10%	19%	6%
Clark Canyon Reservoir	1%	1%	1%	-	1%
Gates of the Mountains	2%	2%	4%	2%	1%
Lost Trail Pass	1%	-	7%	-	1%
Bighorn Canyon Nat'l Rec. Area	4%	4%	2%	2%	6%
Museum of the Rockies	3%	2%	4%	5%	3%
Lewis & Clark Interpretive Center	4%	9%	5%	1%	2%
Montana Historical Society	2%	1%	>1%	3%	2%
Pompey's Pillar	4%	7%	3%	>1%	5%
Missouri Headwaters	4%	7%	2%	>1%	3%
Lemhi Pass	>1%	-	-	-	1%
CM Russell Nat'l Wildlife Refuge	1%	1%	2%	1%	1%
Lolo Pass Interpretive Center	2%	2%	1%	-	2%

Table 14: Sources of Information Used to Plan Trip

	All Travelers		Vacation (23%)		VFR (14%)		Business (11%)		Passing Through (47%)	
	All items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Internet	28%	39%	43%	36%	23%	64%	19%	35%	28%	39%
Auto Club	20%	23%	37%	21%	7%	15%	5%	6%	23%	28%
Travel Agency	4%	5%	1%	1%	3%	7%	11%	15%	4%	6%
Chamber/CVB	4%	2%	6%	-	1%	-	3%	5%	5%	3%
MT Travel Planner	9%	6%	27%	10%	-	-	-	-	6%	5%
Nat'l Park	7%	12%	16%	20%	-	-	2%	5%	6%	9%
1-800 state #	1%	>1%	2%	-	1%	-	1%	-	-	-
Guide Book	5%	5%	13%	7%	3%	6%	2%	-	3%	4%
Private Business	8%	8%	22%	6%	2%	7%	15%	34%	2%	6%
None of these used	45%	-	25%	-	64%	-	62%	-	41%	-

Table 15: Sources of Information Used While in Montana

	All Travelers		Vacation (23%)		VFR (14%)		Business (11%)		Passing Through (47%)	
	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Info center person	14%	18%	33%	36%	14%	12%	9%	15%	8%	11%
Billboards	12%	7%	7%	9%	9%	14%	4%	2%	18%	5%
Highway Signs	28%	28%	30%	10%	30%	41%	20%	9%	30%	41%
Brochure Rack	23%	17%	42%	30%	8%	10%	31%	24%	20%	8%
Service Person	25%	30%	33%	16%	15%	23%	30%	49%	25%	36%
None of these used	44%	-	19%	-	53%	-	54%	-	46%	-

Table 16: Activities Participated in While in Montana on this Trip

	All Travelers		Vacation (23%)		VFR (14%)		Business (11%)		Passing Through (47%)	
	All	Primary	All	Primary	All	Primary	All	Primary	All	Primary
Picnicking	11%	7%	22%	6%	16%	6%	Insufficient sample size of business travelers participating in activities		5%	9%
Camping (devlp.)	15%	10%	31%	11%	10%	6%			10%	10%
Camping (undeveloped)	6%	5%	18%	8%	2%	1%			4%	5%
Day Hiking	14%	8%	33%	11%	19%	10%			5%	6%
Golfing	3%	1%	3%	1%	12%	3%			-	-
Backpacking										
Backpacking	2%	>1%	2%	1%	-	-			2%	-
Mountain Biking	>1%	>1%	-	-	1%	>1%			1%	1%
Road/tour Biking	3%	1%	6%	2%	3%	1%			2%	1%
Off Highway/ATV	1%	1%	>1%	-	8%	5%			-	-
Fishing	8%	6%	19%	8%	17%	8%			3%	3%
Motor boating										
Motor boating	1%	>1%	-	-	2%	1%			2%	-
Water-skiing	1%	-	>1%	-	8%	-			-	-
Canoe/Kayaking	1%	>1%	1%	-	-	-			-	-
Sail/Windsurf	-	-	-	-	-	-			-	-
Rafting/Floating	1%	1%	1%	-	2%	1%			-	-
Nature Study										
Nature Study	3%	1%	7%	2%	4%	1%			2%	1%
Hunting	1%	1%	2%	1%	1%	>1%			-	-
Wildlife watching	12%	6%	28%	10%	12%	5%			7%	3%
Sporting Event	2%	1%	2%	1%	6%	4%			1%	-
Gambling	5%	2%	11%	1%	6%	4%			1%	1%
Shopping	27%	15%	31%	9%	59%	26%			10%	9%
Snowmobiling										
Snowmobiling	>1%	-	-	-	-	-			1%	-
Downhill Skiing	1%	1%	3%	1%	1%	>1%			-	-
Snowboarding	>1%	>1%	1%	>1%	-	-			-	-
XC Skiing	1%	-	-	-	6%	-			-	-
Snowshoeing	-	>1%	-	-	-	-			-	-
Ice Fishing	-	1%	-	-	1%	1%			-	3%
Visited Sites:										
Native American	13%	7%	25%	6%	13%	1%	↓		12%	12%
Lewis & Clark	9%	4%	19%	4%	5%	2%			9%	8%
Other History	22%	10%	45%	11%	19%	5%			18%	14%
Museums	13%	7%	21%	3%	12%	5%			11%	13%
Festivals/Events	6%	3%	8%	3%	13%	3%			2%	2%

Table 17: Comments by All Visitors*

	N
Montana has nice scenery	72
General positive comments, i.e.	72
Would like to return	57
Comments about specific sites	26
Lack of mid-priced eating facilities	25
Passing through	17
Miscellaneous	17
Montana has nice people	12
Came for outdoor recreation, i.e. skiing, rafting, etc.	12
Rest areas	9
Public access	8
Have been here before	5

*These were open-ended comments written by respondents who chose to write in the available space on the survey.

Summary, Discussion & Recommendations

Summary and Discussion

The results of the spring nonresident study bring out a number of interesting marketing opportunities, policy challenges, and questions that may or may not be answerable. This section includes a discussion of what the results mean and recommendations for marketing, policy decisions, and further research. Recall that spring refers to only the two months of April and May. The previous ITRR spring report in 1993 used April, May and June, therefore a comparison between the two spring reports is not being made.

Spring Expenditures

(Table 1; p. 4)

Average daily expenditures of spring nonresident visitors to Montana was \$95.98 or \$294.65 for their trip based on a length of stay of 3.04 nights. Since the majority of the visitors were simply passing through the state, it makes sense that the highest expenditure item was on gasoline (\$27.44). This is followed by hotel/motel expenditures and restaurant/bar of over \$18 each. In contrast, the highest expenditure for the winter 2001 visitor was retail. This is in line with the high number of vacation and VFR groups. When visitors are here for any other reason than passing through, they are inclined to shop.

Travel Patterns

(Tables 2-4, & 9; pp.4, 5, 6, & 9)

Survey responses for this part of the questionnaire were lower than other sections because this data is dependent on the visitor tracing their travel route on a small map of Montana. Some people chose to ignore the map or simply did not know how to read and trace on the map with comfort. Therefore, while the responses on the map segments still represent the basic traveler routes, some inconsistencies may arise. For instance, we know that 19 percent of all travel groups visited Glacier National Park, however the road segment nearest the park (US Hwy 2) does not show 19 percent of the travelers in that area.

The majority of spring travelers in Montana stayed on the Interstates. Between 21 and 45 percent of all nonresidents traveled the east-west corridors of Interstate 90 and Interstate 94. The most heavily traveled section of Interstate 90 was between Bozeman and Billings with 35-45 percent of all nonresidents traveling a portion of that Interstate section. The most heavily traveled section on I-94 was between Billings and Miles City with 24-30 percent of all nonresident traffic. US2 was much less traveled with only 3-9 percent of all visitors traveling any part of that highway in the spring months. The north-south routes carried only slightly more traffic than US2. Interstate 15 from Butte to the Idaho border had the highest percent of nonresident travelers with up to 12 percent traveling that section. In contrast to winter visitors, where US191 from Bozeman to Big Sky had the next highest percent of north-south traffic, spring visitors were more likely to travel from Livingston to Gardiner, with 14 percent of nonresidents traveling that route.

Glacier Country Travel Region received the largest percent of overnight stays of all the travel regions in the state (29%). Custer and Yellowstone Countries received 25 and 21 percent, respectively, of overnight stays. While Glacier Country hosted the most overnight visitors, Billings was still the *community* with the most number of overnight visitors (17%) followed by Missoula (10%) and Bozeman (9%).

These travel patterns and choices in overnight stays are partially explained by the residences of the visitors. Twenty-two percent came from Washington and Idaho (Table 9). North Dakota and Wisconsin made up 17 percent of all visitors to the state. The emergence of Wisconsin visitors in relatively large numbers is a new trend. All other 2001 visitors represented similar states from other studies.

Satisfaction and Changes Observed

(Tables 5 & 6; p. 7)

Nonresidents were asked to rate their satisfaction with eight travel-related conditions they were likely to have encountered while in Montana. Responses were rated on a three-point scale where "1" was satisfied, "2" was neutral, and "3" was dissatisfied. Nonresidents were satisfied with their experiences in Montana since all eight categories received a rating less than "2". Condition of the natural environment received the highest satisfaction ratings with 89 percent of all visitors indicating being satisfied with Montana's natural environment (mean satisfaction level was 1.11). At the other end, 59 percent of visitors indicated satisfaction with the availability of highway rest areas. This feature received the highest dissatisfaction ratings with 10 percent being dissatisfied. However, the mean satisfaction level of 1.50 still shows overall satisfaction with rest areas.

Visitors who had been to Montana in the past were asked to indicate whether certain aspects of Montana have changed over time. Since 81 percent of all visitors had visited the state on previous occasions, the comparisons included a significant sample of spring visitors. The change scale ranged from 1 to 3 with "1" indicating that things were better, "2" meant things were the same, and "3" meant things were worse. A score closer to "1" indicated an improvement, while a score closer to "3" indicated a worsening condition.

One aspect over time appears to be worsening from the point of view of visitors who have been here in the past. "Amount of open space" received a mean of 2.03 with 18 percent of the visitors saying it had worsened and only 15 percent indicating it had improved. The availability of commercial lodging received the highest number of "better" ratings (40%, mean 1.61). In summary, however, "changes over time" appear to be slight. The majority of visitors generally see that things have not changed much for the better or worse.

Traveler Demographic and Trip Characteristics

(Tables 7-15; pp. 7-12)

Spring visitors to Montana have a variety of reasons for coming to the state, but the most predominant reasons indicated, when asked to name all their purposes, were passing through (53%), vacation (43%), and VFR (27%). When asked to indicate the *primary* reason for visiting, passing through (47%) emerged as the dominant reason for visitors to be in Montana in the spring months. Vacation was the second highest reason at 23 percent while VFR fell to only 14 percent of the visitors.

Eighty-one percent of all spring visitors had been to Montana in the past. The largest portion (28%) had been to Montana more than 21 times in the past 10 years. Even 75 percent of those passing through the state had been to Montana in the past, although not as often as all visitors. These repeat visitors had visited more often in the spring (65%), but in a close second was summer visitation at 63 percent of all visitors.

Couples made up 39 percent of all spring travel groups, while 29 percent traveled alone and 20 percent traveled as a family. However, only 10 percent traveled with children under 18 years of age. The most likely income range of visitors was \$40,000-\$59,999. However, when looking at visitors who were here primarily for vacation, their income was most likely to be \$60,000-\$80,000.

In the spring, 18 percent of the visitors flew on some portion of their trip. When spring visitors flew, 10 percent rented a vehicle. Cars were rented in Montana by 42 percent of those who rented while another 19 percent rented in Washington and drove to Montana.

Of the many accommodation types available to visitors, hotel/motel/B&B proved the accommodation type of choice. Fifty-seven percent of all the nights were spent in a hotel/motel/ B&B. Other likely overnight

accommodations were staying at the home of a friend/relative or staying in a private campground (14% of the nights were spent in each). Not unexpectedly, of those visitors in Montana primarily to visit friends/relatives, 56 percent of their nights were spent in a private home. Interestingly, while 58 percent of the nights for visitors passing through stayed overnight in a motel, 30 percent of the nights were spent in a private or public campground.

While visitors were attracted to Montana's open space/uncrowded areas and the mountains/forests (23% and 24% of *all* visitors respectively), visitors in Montana *on vacation* were attracted to Glacier National Park (48%), mountains/forests (48%), and Yellowstone National Park (46%). However, when asked what their primary attraction to the state was for *all* visitors, Yellowstone National Park (21%) followed by family/friends (11%) came on top. The primary attraction by *vacationers* was Yellowstone National Park (24%) and Glacier National Park (17%).

2001 spring visitors were attracted to Montana for a variety of reasons, however, the primary reason for visiting the state highlights the differences in what attracted visitors. As mentioned, the primary attraction for vacationers was Yellowstone (24%) and Glacier (17%) while those in Montana to visit friends and relatives indicated that family and friends were indeed what attracted them to the state (66%). Interestingly, those passing through the state indicated that Yellowstone (35%) attracted them here. This indicates that even though visitors are passing through, there is still a reason to stop while in Montana.

The sites visited somewhat mirror what attracted visitors to Montana. Vacationers were more likely to visit more sites than other types of visitors (Glacier and Yellowstone National Parks – 47% each, Little Bighorn battlefield – 34% and Flathead Lake – 28%). Those visitors here to spend time with friends and relatives did not visit many sites, but when they did, visiting Yellowstone (13%) and visiting Flathead Lake (10%) were the most likely places to visit. Twenty-three percent of people passing through the state visited Yellowstone and 20 percent visited Little Bighorn Battlefield.

For trip planning, the Internet and auto clubs were used most by vacationers, those passing through, and VFR. Visitors here on business used the Internet and private businesses as their most important sources of information. After arriving in Montana, vacationers thought people in information centers and brochure racks provided the most useful information (36% and 30% respectively) while those here on business indicated that service people (waiters, gas station attendants, front desk personnel) were the most useful (49%). All other visitors indicated that highway road signs were the most useful source of information (41%).

Travel Activities

(Table 16; p. 13)

Visitors were asked to indicate all the activities their group participated in while in Montana. They were then asked to indicate their top three activities, or their primary activities. It is important to look at the visitors' primary reason for being in Montana when looking at activities as this best describes the visitors.

People who were in Montana primarily for vacation (23% of spring visitors) were very active travelers. Forty-five percent visited history sites while 25 percent visited Native American sites and 21 percent visited museums. History was a common activity for vacationers. In addition, 33 percent went day hiking while 49 percent camped and 28 percent watched wildlife.

In contrast to vacationers, those visitors in Montana primarily to visit friends and relatives were much less active. The single most predominant activity was shopping where 59 percent of VFR visitors did this activity. The second activity, but much further down the line than shopping, was visiting historic sites and day hiking (19% each). This was followed by 17 percent who went fishing and 16 percent who went on a picnic.

Visitors passing through the state did report some activities, even though it was slight. Eighteen percent reported visiting historic sites, 12 percent visited Native American sites, and 11 percent visited museums. These were the highest reported activities for people simply passing through the state. It is obvious that their main objective was to use Montana highways to get to their destination. Not unexpectedly, those visitors in

Montana on business did not participate in activities. Too few of the business visitors indicated any activities, therefore it could not be reliably reported.

Recommendations

In this section we will discuss how this information about nonresident spring visitors could be used by policy makers and marketers, as well as where more research is needed. We remind the readers that these recommendations are simply that – recommendations. Policy and marketing decisions are not within the realms of academic researchers whose role is to provide information. Researchers attempt to analyze and describe what the information means. Others should attempt to use the information to improve policy and marketing decisions.

Policy

The current policy in Montana related to nonresident visitors is to promote and encourage visitation to the state. This is achieved through numerous methods of advertising throughout the country and the world, and by assisting communities in tourism development. While this has proven to be successful, it does not always capture the full potential for nonresident visitation.

When 47 percent of all nonresidents are simply passing through the state in the spring, it highlights Montana's highway system. If nonresident travel is embraced at the state level as an important economic tool in Montana, then highway infrastructure, which includes visitor information and rest areas, is important. It is a recognized fact that if a visitor stays an extra four hours, he or she will spend more money. It is therefore a good policy decision to place official highway signs for museums, sights, parks, and other cultural sites in plain sight of people traveling the highways. Information centers/rest areas along the highways are also useful for getting information to the visitors. When one looks at those passing through the state, they do not participate in very many activities, but when they do, visiting museums, historic sites and other cultural sites are their chosen activities. It is clear that if more information were available to motorists while traveling Montana's highways, they would be more likely to pull off the highway and spend extra time in Montana. However, according to previous nonresident studies (summer 1996, winter 1998), visitors do not want to see more billboards for the signage needs. It is official highway signs that are desired.

One trend that emerged from the winter nonresident visitor survey and which appears to continue as a trend by the spring visitors is that the amount of open space is believed to have declined over the years. In the winter survey, 22 percent of repeat visitors said that open space had declined. In the spring survey, 18 percent said the same thing. This finding is more important when looking at the attractions to the state. Forty percent of vacationers said that open space/uncrowded areas was one attraction to visiting. Policy makers need to be aware that nonresident visitation could diminish if the attractions they seek are no longer in the state. In fact, it could point to a need to look into the relationship between the planning departments of counties and cities and the real estate regulations in the area. While this comment is made based on what nonresidents say about the state, it is also recommended that policy makers understand the needs and desires of residents before designing policy related to open space issues.

Winter nonresident visitors spent over \$146 million directly in shopping, eating, and drinking establishments (RR 2001-7). Nonresidents spent more in these retail and service areas in the winter than any other spending category. In the spring, however, nonresidents spent more of their dollar on gasoline and motels than on food and retail. This is directly related to the large number of visitors who are simply passing through the state. Again, if there is a way to encourage these pass-through visitors to spend a little more time in the state, expenditures in retail and other categories will certainly increase

Marketing

A number of marketing suggestions related to the information generated from this data are provided below. These suggestions simply come from what we, as researchers, see as opportunities in the marketing arena.

The most obvious marketing opportunity comes from the intent of visitors. When asked if they will return to Montana in the next two years, 87 percent of all visitors said yes. This included 89 percent of vacationers who indicated they would return in two years which happened to be the same number of winter vacationers who said they would return in two years. Marketing to repeat visitors should be a regular program within Montana's promotion division, all travel regions and CVBs, as well as private businesses throughout the state. It is evident that the Super-host program should continue. When visitors feel welcomed by residents, it encourages return visits. In addition, it is recommended that marketers "go into the minds" of visitors and discover what it is that brings them back and then display those Montana characteristics prominently in advertising and promotional efforts on a continual basis.

In the effort of keeping the visitor returning each year, it is useful to know where they reside. Spring visitors are most likely to be from Washington, Idaho, North Dakota, and Wisconsin. It is smart marketing to promote in the areas where current visitors reside as this will undoubtedly encourage return visits and possibly stimulate new visitation. Interestingly, visitors from Wisconsin have not been a common visitor to the state, but certainly came to Montana in high numbers during the spring of 2001. While these researchers are not aware of the reasons why an increasing number of visitors came from Wisconsin, perhaps those with the marketing dollars have a better understanding of this change. It is recommended that promotions continue (or start) in Wisconsin.

Spring vacation visitors are primarily attracted to Montana's Yellowstone and Glacier National Parks (24% and 17% respectively). Promoting what brings people to the state will continue to bring visitors. It is important to recognize why visitors come and to show these features continually in promotional efforts.

As stated in the Nonresident Winter Visitor report (RR2001-7), Montana's promotional division has been a leader in using the Internet to encourage visitation to the state. Apparently it is working for both winter and spring visitors. In planning a trip, the Internet was touted as the number-one planning tool by all visitor groups. Twenty-eight percent of all visitors used the Internet for planning, but when analyzed by purpose of trip, it was found that the Internet was also said to be the most useful form of information for planning (35%-64%). The Internet has become the planning tool of choice. Therefore it is important to continue to update and improve the information available on the Internet.

Finally, an interesting trend is occurring in Montana. Visiting sites of cultural and historical importance was participated in by 45 percent of all vacationers. This is the first time that history/culture has been the top activity for vacationers. It was also the top activity for people passing through the state. One reason may be that April and May are not the best months to participate in outdoor activities and therefore history and culture become the leading draw. Whatever the case, it seems that spring promotional efforts showing the wealth of history and culture to be experienced in Montana would be rewarded with nonresident visitation to the state.

Future research

While there are numerous research questions that emerge from this data, only a few suggestions will be explored here.

As stated in the Nonresident Winter Report, there needs to be further exploration as to what is meant by "open space and uncrowded areas". Since this has been stated as an attraction to the state, it is important to understand why this attracts visitors. Is it just knowing open space is there and visible from the highway that attracts them, or do they recreate in these areas? Would visitors still come without the open space? Are uncrowded areas synonymous with open space, or is there a different meaning to the latter term?

Another area of research exploration is to further understand the pass-through visitor. It would be helpful to know if these people would be willing to spend more time in Montana. Is there anything that Montana could do to encourage a longer stay in the state? If so, what would encourage them to extend their stay? Is it simply information about what is available that is needed or does Montana need to develop more services and infrastructure to encourage an extended length of stay? Maybe these visitors will not be enticed by any attempts to get them to stay longer, but this is a question that should be answered.

Visiting museums and historical areas is an activity highly participated in by spring visitors. It would be useful to know the extent of their interest in culture and history, and what Montana could do to continue offering what they are seeking. Is there a need for improvements and if so, what kinds of improvements? How can Montana promote its history and culture so visitors are encouraged to come to the state?

Finally, it is recommended that continual in-depth studies be conducted on visitors' trip planning especially as it relates to the Internet. The Internet is the medium of choice for information gathering, therefore up-to-date knowledge of Internet decision making will allow marketers to provide what the consumer desires.

Survey



2001 Montana Nonresident Travel Survey

INSTRUCTIONS: MAKE DARK MARKS • FILL IN COMPLETELY TO RECEIVE •

- 1) What are the purposes for your trip to Montana? (Please fill in circles for all that apply.)
- 1 Visit friends/relatives/family event 2 Shopping 3 Other
- 2) Of the items you marked above, please fill in the oval corresponding to your main purpose for visiting Montana. (Please fill in one oval.)
- 1 2 3 4 5 6
- 3) If you indicated you are vacationing/planning in (1) above, what attracted you to Montana? (Please fill in circles for all that apply.)
- 1 Scenic beauty 2 Family/friends 3 Fishing 4 Adventure/Outdoor Recreation 5 Snow Skiing 6 Wildlife Viewing/Photography 7 Mountain Views 8 Hot Springs/Spa/Hot Pools 9 Cross-country skiing 10 Northern Great Plains/Bookends 11 Antiquities/Natural Prod. 12 Game W. 13 Cultural Attr. 14 Snowmobiling 15 Special event 16 Snow & Ice Activities 17 Hunting 18 Other 19 Wildlife Viewing/Photography 20 Snowmobiling 21 Cross-country skiing 22 Cultural Attr. 23 Special event 24 Fishing
- 4) Of the attractions you marked above, please fill in the oval corresponding to what attracted you most to Montana. (Please fill in one oval.)
- 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
- 5) What option below best describes your travel party? (Please fill in ONE oval.)
- 1 Self 2 Couple 3 Family 4 Friends 5 Family & Friends 6 Business Associates 7 Organized group or club
- 6) Do you plan on visiting Montana again in the next 2 years? YES NO
- 7) Have you ever lived in Montana? YES NO
- 8) Did you fly on a commercial air carrier for any portion of this trip? YES NO

- 9) Did you rent an automobile for any portion of this trip? YES NO
- 9a) If yes, where was it rented? (Please fill in one oval.)
- 1 Atlanta 2 Reno 3 Denver 4 Phoenix 5 Other
- 6 Idaho 7 Oregon 8 Washington State 9 Alberta, Canada 10 British Columbia, Canada 11 Other
- 10) Did you hire an outfitter or outdoor guide for any portion of your trip in Montana? YES NO
- 11) How many total nights will your group be away from your permanent residence on this trip? Write the total number of nights with one digit in each box and fill in the corresponding oval below each digit.
- 1.2) How many total nights is your group staying in Montana on this trip? Write the total number of nights with one digit in each box and fill in the corresponding oval below each digit.

0	1	2
3	4	5
6	7	8
9		

0	1	2
3	4	5
6	7	8
9		

0	1	2
3	4	5
6	7	8
9		

- 13) Prior to your visit, which of the following sources did you or someone in your travel group use to gather information for this trip? (Please fill in circles for all that apply.)
- 1 Automobile club (e.g. AAA) 2 Friends/family 3 Travel agent 4 Computer/Internet 5 Montana Travel Planner 6 National Geographic 7 In-store sign/poster 8 Travel agent/Travel agent website 9 Travel agent/Travel agent website 10 None of these sources were used
- 14) Of the information sources marked above, please fill in the oval corresponding to the most useful source of trip planning information.
- 1 2 3 4 5 6 7 8 9
- 15) While in Montana, where did you receive Montana travel information? (Please fill in circles for all that apply.)
- 1 Travel agent/Travel agent website 2 Billboards 3 Brochure rack 4 None of these sources
- 16) Of the information sources marked above, please fill in the oval corresponding to the most useful source of information while in Montana.
- 1 2 3 4 5

17) Please indicate the number of activities in which any member of your travel group participated while in Slovenia. (Please do not add to if the apply)

- | | | | | | | | | | | |
|---|-------------------------------------|---------------------------------------|---------------------------------------|--------------------------------------|--------------------------------------|--|---|--|--|--|
| <input type="checkbox"/> None | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 | <input type="checkbox"/> 4 | <input type="checkbox"/> 5 | <input type="checkbox"/> 6 | <input type="checkbox"/> 7 | <input type="checkbox"/> 8 | <input type="checkbox"/> 9 | <input type="checkbox"/> 10 |
| <input type="checkbox"/> 1. Mountain climbing | <input type="checkbox"/> 11. Hiking | <input type="checkbox"/> 22. Canoeing | <input type="checkbox"/> 33. Kayaking | <input type="checkbox"/> 44. Fishing | <input type="checkbox"/> 55. Hunting | <input type="checkbox"/> 66. Bird watching | <input type="checkbox"/> 77. Photography | <input type="checkbox"/> 88. Visiting museums | <input type="checkbox"/> 99. Visiting historical sites | <input type="checkbox"/> 1010. Other (specify) |
| <input type="checkbox"/> 2. Canoeing | <input type="checkbox"/> 12. Hiking | <input type="checkbox"/> 23. Canoeing | <input type="checkbox"/> 34. Kayaking | <input type="checkbox"/> 45. Fishing | <input type="checkbox"/> 56. Hunting | <input type="checkbox"/> 67. Bird watching | <input type="checkbox"/> 78. Photography | <input type="checkbox"/> 89. Visiting museums | <input type="checkbox"/> 910. Visiting historical sites | <input type="checkbox"/> 1011. Other (specify) |
| <input type="checkbox"/> 3. Hiking | <input type="checkbox"/> 13. Hiking | <input type="checkbox"/> 24. Canoeing | <input type="checkbox"/> 35. Kayaking | <input type="checkbox"/> 46. Fishing | <input type="checkbox"/> 57. Hunting | <input type="checkbox"/> 68. Bird watching | <input type="checkbox"/> 79. Photography | <input type="checkbox"/> 810. Visiting museums | <input type="checkbox"/> 911. Visiting historical sites | <input type="checkbox"/> 1012. Other (specify) |
| <input type="checkbox"/> 4. Canoeing | <input type="checkbox"/> 14. Hiking | <input type="checkbox"/> 25. Canoeing | <input type="checkbox"/> 36. Kayaking | <input type="checkbox"/> 47. Fishing | <input type="checkbox"/> 58. Hunting | <input type="checkbox"/> 69. Bird watching | <input type="checkbox"/> 710. Photography | <input type="checkbox"/> 811. Visiting museums | <input type="checkbox"/> 912. Visiting historical sites | <input type="checkbox"/> 1013. Other (specify) |
| <input type="checkbox"/> 5. Hiking | <input type="checkbox"/> 15. Hiking | <input type="checkbox"/> 26. Canoeing | <input type="checkbox"/> 37. Kayaking | <input type="checkbox"/> 48. Fishing | <input type="checkbox"/> 59. Hunting | <input type="checkbox"/> 70. Bird watching | <input type="checkbox"/> 811. Photography | <input type="checkbox"/> 912. Visiting museums | <input type="checkbox"/> 1013. Visiting historical sites | <input type="checkbox"/> 1014. Other (specify) |
| <input type="checkbox"/> 6. Canoeing | <input type="checkbox"/> 16. Hiking | <input type="checkbox"/> 27. Canoeing | <input type="checkbox"/> 38. Kayaking | <input type="checkbox"/> 49. Fishing | <input type="checkbox"/> 60. Hunting | <input type="checkbox"/> 71. Bird watching | <input type="checkbox"/> 812. Photography | <input type="checkbox"/> 913. Visiting museums | <input type="checkbox"/> 1014. Visiting historical sites | <input type="checkbox"/> 1015. Other (specify) |
| <input type="checkbox"/> 7. Hiking | <input type="checkbox"/> 17. Hiking | <input type="checkbox"/> 28. Canoeing | <input type="checkbox"/> 39. Kayaking | <input type="checkbox"/> 50. Fishing | <input type="checkbox"/> 61. Hunting | <input type="checkbox"/> 72. Bird watching | <input type="checkbox"/> 813. Photography | <input type="checkbox"/> 914. Visiting museums | <input type="checkbox"/> 1015. Visiting historical sites | <input type="checkbox"/> 1016. Other (specify) |
| <input type="checkbox"/> 8. Canoeing | <input type="checkbox"/> 18. Hiking | <input type="checkbox"/> 29. Canoeing | <input type="checkbox"/> 40. Kayaking | <input type="checkbox"/> 51. Fishing | <input type="checkbox"/> 62. Hunting | <input type="checkbox"/> 73. Bird watching | <input type="checkbox"/> 814. Photography | <input type="checkbox"/> 915. Visiting museums | <input type="checkbox"/> 1016. Visiting historical sites | <input type="checkbox"/> 1017. Other (specify) |
| <input type="checkbox"/> 9. Hiking | <input type="checkbox"/> 19. Hiking | <input type="checkbox"/> 30. Canoeing | <input type="checkbox"/> 41. Kayaking | <input type="checkbox"/> 52. Fishing | <input type="checkbox"/> 63. Hunting | <input type="checkbox"/> 74. Bird watching | <input type="checkbox"/> 815. Photography | <input type="checkbox"/> 916. Visiting museums | <input type="checkbox"/> 1017. Visiting historical sites | <input type="checkbox"/> 1018. Other (specify) |
| <input type="checkbox"/> 10. Canoeing | <input type="checkbox"/> 20. Hiking | <input type="checkbox"/> 31. Canoeing | <input type="checkbox"/> 42. Kayaking | <input type="checkbox"/> 53. Fishing | <input type="checkbox"/> 64. Hunting | <input type="checkbox"/> 75. Bird watching | <input type="checkbox"/> 816. Photography | <input type="checkbox"/> 917. Visiting museums | <input type="checkbox"/> 1018. Visiting historical sites | <input type="checkbox"/> 1019. Other (specify) |
| <input type="checkbox"/> 11. Hiking | <input type="checkbox"/> 21. Hiking | <input type="checkbox"/> 32. Canoeing | <input type="checkbox"/> 43. Kayaking | <input type="checkbox"/> 54. Fishing | <input type="checkbox"/> 65. Hunting | <input type="checkbox"/> 76. Bird watching | <input type="checkbox"/> 817. Photography | <input type="checkbox"/> 918. Visiting museums | <input type="checkbox"/> 1019. Visiting historical sites | <input type="checkbox"/> 1020. Other (specify) |

18) On the activities you marked in 17), please enter the corresponding number and fill in the oval below it for the time period in which you participated in them in Slovenia.



19) Please rate your overall satisfaction with the following conditions in Slovenia. (Please do not add to what is not applicable)

Rated	Satisfied	Dissatisfied	Over/Under
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20) Have you ever stayed in Slovenia before this trip? YES NO Not sure (please skip to question 24)

20a) If yes, how many visits in the past 10 years? (Please fill in your answer)

- 1 visit 2 visits 3 visits 4 visits 5 visits 6-10 visits 11-20 visits 21 or more

20b) In what season have you stayed during the past 10 years? (Please do not add to what is not applicable)

- Spring Summer Fall Winter

20c) Please indicate how your best Slovenian has changed over time for the following features. (Please do not add to what is not applicable)

Best Slovenian	Before	After	Same	Worse
1. Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Hospitality and service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Scenic beauty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Variety of things to see	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Cleanliness of outdoor environments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Availability of outdoor activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Availability of outdoor equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Availability of outdoor information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Availability of outdoor services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Availability of outdoor facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Availability of outdoor equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Availability of outdoor information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Availability of outdoor services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Availability of outdoor facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21) Which of the following sites have you or do you plan to visit in the fall or throughout the year? (Please do not add to what is not applicable)

- | | | | |
|---|---|---|--|
| <input type="checkbox"/> 1. Triglav National Park | <input type="checkbox"/> 6. Lake Bled | <input type="checkbox"/> 11. Lake Bohinj | <input type="checkbox"/> 16. Lake Plav |
| <input type="checkbox"/> 2. Lake Bled | <input type="checkbox"/> 7. Lake Cerknica | <input type="checkbox"/> 12. Lake Dravsko | <input type="checkbox"/> 17. Lake Vrnjci |
| <input type="checkbox"/> 3. Lake Bohinj | <input type="checkbox"/> 8. Lake Golubovo | <input type="checkbox"/> 13. Lake Idrija | <input type="checkbox"/> 18. Lake Zilj |
| <input type="checkbox"/> 4. Lake Cerknica | <input type="checkbox"/> 9. Lake Isonzo | <input type="checkbox"/> 14. Lake Krško | <input type="checkbox"/> 19. Lake Osojnica |
| <input type="checkbox"/> 5. Lake Dravsko | <input type="checkbox"/> 10. Lake Ljubljana | <input type="checkbox"/> 15. Lake Mura | <input type="checkbox"/> 20. Lake Pivka |

22) Are you traveling with children under 18 years old? YES NO

22a) If yes, how many did the children believe...

- ...the planning of the trip Yes No Not sure
- ...what you did on the trip Yes No Not sure

23) What best describes your annual household income in US dollars? (Please do not add to what is not applicable)

1. Less than \$10,000 2. \$10,000 to \$19,999 3. \$20,000 to \$29,999 4. \$30,000 to \$39,999 5. \$40,000 to \$49,999 6. \$50,000 to \$59,999 7. \$60,000 to \$69,999 8. \$70,000 to \$79,999 9. \$80,000 to \$89,999 10. \$90,000 to \$99,999 11. \$100,000 or more

24) Please record all of your travel group's expenditures for the day of your trip indicated on the envelope accompanying this survey. Enter the amount and the town where you spent money during your visit in Montana. If you spent money in more than one Montana town, use a separate line for each place you spent money. Use the "Additional" category if the expenditure type does not match those listed.

Expenditure Type	Amount Spent on Assigned Day	Montana Town
SAMPLE Retail Goods T-Shirts	\$ 25.00	Helena
Campground facility, RV hook-up		
Hotel, motel, hotel & breakfast, etc.		
Gasoline, Oil		
Restaurant, Bar		
Cookies, Snacks		
Retail Goods		
Outdoor gear, outfitters		
Auto/RV Rental, Repair		
Transportation Fares		
Licenses, entrance fees		
Additional		

25) The above expenditures were for one day only. Now, to the best of your ability, please estimate the entire amount your travel group spent or will spend in Montana on this trip. Please include only those expenditures made in Montana. \$ _____

26) Please list the location (nearest town) and type of accommodation (from the list below) for your first eight nights spent in Montana.

Night	Town	Type	Accommodation Type Categories
1)	Helena	A	A) Hotel/motel/bed & breakfast C) Rental cabin/home
2)			B) Vehicle in parking area H) Resort/condominium
3)			C) Private cabin/second home I) Guest ranch
4)			D) Public land camping (e.g. Nat'l Park) J) Other (please describe)
5)			E) Private campground (e.g. KOA)
6)			F) Home of friend/relative
7)			
8)			

27) In what U.S. state, Canadian province or foreign country do you permanently reside? _____

28) Please complete the map on back.

29) Please include any comments you may have: _____

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30) On the map below, please trace your travel route through and around Montana- Use arrows (→) to indicate your direction of travel. Place an "E" to indicate where you entered Montana and an "X" to indicate your point of exit from the state. If you have entered, exited, and re-entered the state on this trip away from home, please include only the portion of your trip through Montana which begins with your most recent point of entry into the state and your next point of exit from the state



