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Nonresident SUMMER Visitor Profile: A study of Summer Visitors to Montana

Norma Nickerson


The University of Montana-Missoula

Thale Dillon

The University of Montana-Missoula

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Nonresident *Summer* Visitor Profile

A study of Summer Visitors to Montana

Research Report 2002-5

April 2002

**Institute for Tourism &
Recreation Research**

School of Forestry
32 Campus Dr. #1234
The University of Montana
Missoula, MT 59812

Phone (406) 243-5686
Fax (406) 243-4845
www.forestry.umt.edu/itrr

Nonresident *Summer* Visitor Profile

by

Norma Nickerson, Ph.D.

Thale Dillon, M.S.

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Institute for Tourism & Recreation Research
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Missoula, MT 59812
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Executive Summary

Nonresident Summer Travelers to Montana: 2001

- During the four-month study period June-September, nonresident visitors were intercepted at gas stations, rest areas, and airports. Questionnaires were handed to 7,362 groups with a resulting 40% response rate.
- Summer visitors deposited \$1.042 billion in Montana in 2001, a slight decrease in overall summer expenditures of \$1.071 billion in 1996 (in 2001 dollars). This drop in expenditures is explained by a slightly shorter length of stay from 4.5 nights in 1996 to 4.2 nights in 2001 plus a slight decrease in group size of 2.5 down from 2.6.
- The top three expenditure categories were gasoline at \$25.14, retail at \$24.18, and restaurant/bar at \$21.20 per visitor group per day.
- Summer visitors travel a variety of road segments. On the east-west corridors, between 19 and 39 percent of all nonresidents traveled Interstate 90, and up to 19 percent traveled parts of US2 by Glacier National Park. The most heavily traveled section of Interstate 90 was between Livingston and Bozeman (39%). The most heavily traveled section on Interstate 94 was between Billings and Miles City with 14-15 percent of all nonresident traffic. Going to-the-Sun-Road in Glacier National Park saw 15 percent of Montana's nonresident traffic.
- The north-south routes carried significantly fewer nonresidents than the east-west routes. US89 between Livingston and Gardiner had the highest percent of travelers (19%), followed by Interstate 15 between Shelby and Great Falls with 7-13 percent of the traffic and 13-14 percent who traveled US93 between Polson and Missoula. Fifteen percent of the traffic traveled into Yellowstone National Park from West Yellowstone.
- Communities in the state who received the highest proportion of nonresidents overnights were Billings (9%), Missoula and West Yellowstone (7% each), Bozeman (6%), and Gardiner and Great Falls (4% each).
- People who reside in Washington and California come to Montana in greater percentage than any other state (12% and 10% respectively). The bordering states of Idaho, North Dakota, and Wyoming add up to 14 percent of all nonresidents visiting Montana in the summer months. Eight percent of all visitors were from Canada while 3 percent were from overseas.
- Seventy-six percent of all summer visitors had visited the state on previous occasions.
- Nonresidents were satisfied with their experiences in Montana and most satisfied with Montana's hospitality and service with 90 percent of respondents indicating they were satisfied. At the other end, 61 percent of visitors indicated satisfaction with the availability of highway rest areas but 11 percent were dissatisfied.
- In general, visitors believe very little has changed in Montana over the years. On the positive side, visitors believe the availability of commercial lodging has improved. On the negative side, 22 percent of the visitors who have been here before believe the amount of open space is disappearing in Montana.
- **Vacationers Profile:** Comprise 52 percent of all summer visitors, stayed 4.6 nights, were in travel groups of couples (45%) or families (34%), and 29 percent were traveling with children under 18 years of age. Thirty-three percent visited Yellowstone, 23 percent visited Glacier, 13 percent visited the Flathead Lake area, and 3 percent visited Little Bighorn Battlefield. Fifty percent watched wildlife, 46 percent day hiked, 45 percent went shopping, 25 percent visited museums, 9 percent hired an outfitter or guide. 44 percent of vacationer nights were spent in hotel/motels while 32 percent of vacationer nights were spent camping. The Internet was used by 53 percent of vacationers for planning their trip followed by an automobile club (30%).
- **Visiting Friend & Relatives (VFR) Profile:** Comprise 15 percent of all summer visitors, stayed 5.7 nights, were in travel groups of families (39%) or couples (34%), and 27 percent were traveling with children under 18 years of age. VFR visitors are less active than vacationers but 49 percent did go shopping, 34 percent went picnicking, 31 percent watched wildlife, and 29 percent day hiked. Fifty-four percent of VFR visitors did not use any of the listed information sources for planning, but 30 percent used the Internet (the information source used by the greatest number of people). Forty-four percent of VFR visitors have lived in Montana in the past.
- **Passing Through Profile:** Comprised 21 percent of all summer visitors, stayed 1.4 nights, traveled as couples (59%) or families (32%). Eighteen percent visited Yellowstone National Park, 18 percent shopped, 17 percent went on a picnic, 15 percent visited Montana history sites.

- **Business:** Comprised 7 percent of all summer visitors, stayed 7.6 nights, traveled alone (49%), and were inactive visitors to the state. The business visitor was more likely to travel by air (43%) than any other visitor type.
- **Comparison between 1996 Summer Visitors and 2001 Summer Visitors:**
 - The number of couples (group type) increased from 38 percent to 41 percent and families decreased by two percentage points.
 - Summer visitors continue to return to Montana at the same rate (76% were repeat visitors in 2001 compared to 75 percent in 1996).
 - Twenty-eight percent of all visitors came from Washington, California and Idaho in both years. The one noticeable change was the re-emergence of Alberta visitors who represented four percent of Montana's summer visitor in 2001.
 - There was a three percentage point increase in vacationers over 1996.
 - The top attractions to Montana have remained the same from 1996 to 2001: Mountains/forests, Yellowstone and Glacier National Parks, Rivers/lakes, and open space/uncrowded areas continue to be the top attractions to Montana.
 - Activities participated in also remained stable over the years with wildlife watching and shopping topping the activity list. However, wildlife watching decreased by nine percentage point in 2001 while shopping increased seven percentage points. The increase of visitors who engaged in some form of historic/cultural site or museum visitation increased from 1996 to 2001.
 - In 1996 only five percent of all visitors used the Internet for planning purposes and only three percent said it was the most useful information source. By 2001, 43 percent of the visitors used the Internet, and 38 percent said it was their most useful source of information. Vacationers used the Internet in even higher proportions with 53 percent using it for planning.
- It is recommended that Montana, from a program development standpoint, look at all aspects of tourism; economic, social and environmental, so as to preserve what we have and the reason why people visit this state.
- The Montana Department of Transportation could reevaluate their plan on rest areas and visitor centers. From an economic development standpoint, visitor centers immediately off the Interstates at the state borders can encourage visitors to stay longer and do more, in turn requiring visitors to spend more dollars in the state.
- Marketing opportunities to nonresident visitors include marketing to the repeat visitor as this type of visitor has already seen parts of the state and could be convinced to return.
- Marketing to new visitors requires placing the two national parks as icons to draw them to the state.
- The majority of visitors overnight in Montana's larger communities. It is important for the areas surrounding the larger communities to work together and encourage circle tours or day trips in and out of "home bases" in the larger communities thereby increasing tourism to rural areas.
- Marketing mechanisms need to continue stressing the Internet for pre-trip planning purposes as well as educating service persons and using highway signs and brochure racks for information during the trip.
- Promoting history and culture to nonresidents is a strategy that will continue to bring visitors back to the state especially with the aging of the baby boomers. With the upcoming Lewis and Clark Bicentennial Commemoration, it is recommended that history and culture are an additional promotional avenue employed by those who promote to nonresidents.

Nonresident *Summer* Visitor Profile

A Study of Summer Visitors to Montana

Introduction

The purposes of this study were to assess characteristics of nonresident summer visitors to Montana, to determine summer travel patterns, and to update visitor estimation figures for the state of Montana. A summer visitor for this study is defined as a nonresident who traveled in Montana anytime during the four summer months of June, July, August, and September.

This summer 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.
- Describe changes in visitor trends since the previous nonresident visitor study.
- 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 summer. Visitors are analyzed and described according to the following categories:

- 1) All summer visitors are analyzed as one group.
- 2) The primary purpose for visiting Montana is analyzed and compared to other purposes.
- 3) 2001 summer visitors are compared to 1996 summer visitors and the differences analyzed.

Methodology

Study Population

Travelers to Montana during the summer of 2001 (June through 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 the following airports: 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.

Results

The results of the summer 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. The second portion of this chapter has comparison tables between the 1996 summer visitor and the 2001 summer visitor. **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 – Summer 2001*

		All Traveler Groups
Total # of Summer Groups		2,267,140
Group Size		2.5
# Of Nights in MT		4.2
Average Daily Expenditures		\$109.51
Total Summer Expenditures		\$1,042,752,906
Expenditure Distribution**	Restaurant/Bar	\$21.20
	Gas/oil	\$25.14
	Retail	\$24.18
	Hotel/motel	\$11.52
	Camping	\$2.42
	Groceries/snacks	\$9.59
	Auto Rental/repair	\$7.23
	Misc. Services	\$0.61
	Transportation	\$0.14
	Entrance fees	\$3.09
	Outfitter/guide	\$4.39

*All figures are rounded.

**Expenditures reflect the average across all groups and do not reflect actual costs of each individual item.

Table 2: Percent of Overnight Stays by Region

Region	% Overnights spent in Region
Glacier Country	33%
Yellowstone Country	30%
Custer Country	14%
Gold West Country	11%
Russell Country	9%
Missouri Country	2%

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

Table 3: Percent of Overnight Stays for Selected Communities

Region	City/Location	% Of all overnights within region	% Of all overnights within state
Glacier Country (33%)	Missoula	20%	7%
	East & West Glacier, St. Mary	17%	5%
	Glacier National Park	15%	
	Whitefish	10%	3%
	Kalispell	8%	3%
	Columbia Falls	4%	
	Hungry Horse	3%	
	Hamilton	2%	
Yellowstone Country (30%)	West Yellowstone	23%	7%
	Bozeman	19%	6%
	Gardiner	12%	4%
	Livingston	10%	3%
	Yellowstone NP	7%	2%
	Red Lodge	6%	
	Big Sky	3%	
	Cooke City	3%	
Custer Country (14%)	Billings	60%	9%
	Miles City	11%	
	Hardin	7%	
	Glendive	5%	
Gold West Country (11%)	Butte	28%	3%
	Helena	18%	2%
	Dillon	11%	
	Anaconda	7%	
	Ennis	5%	
	Deer Lodge	5%	
Russell Country (9%)	Great Falls	47%	4%
	Lewistown	14%	
	Havre	12%	
	Shelby	5%	
Missouri River Country (2%)	Glasgow	33%	
	Sidney/Fairview	24%	
	Plentywood	5%	

Table 4: Percent of Nonresidents on Specific Highway Segments*

WEST-EAST		All Travelers	NORTH-SOUTH		All Travelers	
I-90	ID Border to Missoula	24-26%**	I-15	Canada to Shelby	4%	
	Missoula to Butte	33-37%		Shelby to Great Falls	7-13%	
	Butte to Bozeman	33-37%		Great Falls to Helena	9-11%	
	Bozeman to Livingston	39%		Helena to Butte	6%	
	Livingston to Billings	32-35%		Butte to Dillon	10-11%	
	Billings to WY Border	19-21%		Dillon to ID Border	11%	
I-94	Billings to Miles City	14-15%	US93	Canada to Kalispell	2-8%	
	Miles City to Glendive	14%		Kalispell to Polson	7-10%	
	Glendive to ND Border	11-12%		Polson to Missoula	13-14%	
US2	ID Border to Kalispell	5-6%	US191	Missoula to ID Border	4-6%	
	Kalispell to W. Glacier	14-19%		Lewistown to I90	2-3%	
	W. Glacier to Shelby	6-10%		Belgrade to Big Sky	8-12%	
	Shelby to Glasgow	4-5%		Big Sky to W. Yellowstone	12%	
	Glasgow to ND Border	3-4%		West Yellowstone to Madison Junction	15%	
MT200	Missoula to Great Falls	3-6%	US59	Miles City to WY Border	1%	
	G.Falls to Hwy 87 Jct.	5-8%		US287	Choteau to I90 Jct.	3-6%
	Hwy 87 to ND Border	1-4%			I90 Jct. to West Yellowstone	5-7%
US12	Helena to Townsend	7%	US89	Canadian B. to Browning	5-12%	
	Beartooth to Red Ldg	5%		Browning to Great Falls	4-7%	
	Red Lodge to Laurel	5-7%		Livingston to Gardiner	19%	
US212	I90 Jct. to Broadus/WY	3%				
	Rockvale to WY Bord.	3%				
US310			MT16	Canada to Plentywood	6%	
Going-to-the-Sun Road		15%				

*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 *Summer* Visitors

Table 5: Satisfaction with Montana Conditions (Summer Visitor)

Total number of responses per statement ranged from 2,120 – 2,791	Mean*	% Satisfied	% Neutral	% Dissatisfied
Road Conditions	1.29	77%	17%	6%
Directional Signage	1.20	83%	14%	3%
Hospitality & Service	1.11**	90%	10%	<1%
Commercial Lodging Availability	1.25	78%	19%	3%
Availability of Highway Rest Areas	1.50	61%	28%	11%
Condition of Natural Environment	1.15	88%	9%	3%
Amount of Roadside Historical Information	1.33	69%	29%	2%
Availability of Travel Information	1.31	71%	27%	2%

*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 (Summer Visitor)

Total number of responses per statement ranged from 1,098 – 1,828	Mean*	% Better	% Same	% Worse
Road Conditions	1.59	47%	47%	6%***
Directional Signage	1.71	30%	69%	1%
Hospitality & Service	1.76	26%	72%	2%
Commercial Lodging Availability	1.56**	46%	53%	2%
Availability of Highway Rest Areas	1.81	25%	71%	5%
Condition of Natural Environment	1.91	21%	68%	11%
Amount of Roadside Historical Information	1.77	24%	75%	1%
Availability of Travel Information	1.64	36%	63%	1%
Amount of Wildlife Viewing Opportunities	1.91	20%	69%	11%
Recreation Opportunities	1.70	34%	63%	3%
Amount of Open Space	2.14	9%	69%	22%
Camping Availability	1.87	23%	68%	9%

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

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

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

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

Table 7: Reasons for Visiting Montana in the Summer

	All Reasons	Primary Reason
Vacation	72%	52%
Passing Through	30%	21%
Visit Family & Friends (VFR)	28%	15%
Business	8%	7%
Shopping	6%	1%
Other	7%	4%

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

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

Travelers		ALL TRAVELERS	Vacation (52%)	Visit Friends/ Relatives(15%)	Business (7%)	Passing Through (21%)
Travel Group Type	Couple	41%	45%	34%	18%	45%
	Self	14%	7%	19%	49%	14%
	Family	32%	34%	39%	14%	32%
	Family/Friends	5%	7%	4%	1%	2%
	Friends	6%	6%	3%	3%	6%
	Bus. Assoc.	1%	-	-	15%	-
	Org. Group	1%	1%	-	1%	-
Lived in MT Before?	Yes	16%	10%	44%	20%	6%
Visited MT Before?	Yes	76%	70%	91%	87%	75%
Number of visits in past 10 years	1	18%	22%	12%	14%	18%
	2	13%	16%	8%	7%	16%
	3	10%	9%	10%	13%	12%
	4	9%	9%	7%	6%	8%
	5	7%	7%	8%	4%	7%
	6-10	19%	20%	18%	14%	17%
	11-20	10%	8%	16%	17%	12%
	21+	14%	10%	23%	25%	10%
Seasons Visited Before	Spring	30%	24%	46%	51%	27%
	Summer	68%	62%	85%	76%	64%
	Fall	34%	26%	51%	52%	32%
	Winter	25%	18%	48%	41%	22%
Traveling with Children	Yes	25%	29%	27%	10%	22%
Children's influence in planning	No Influence	34%	26%	49%	Sample size too small to analyze further	43%
	Some Influence	39%	46%	28%		34%
	Great Influence	27%	28%	23%		23%
Children's influence in activities	No influence	14%	8%	27%		17%
	Some Influence	49%	49%	46%		53%
	Great Influence	37%	43%	27%		30%
Travelers		ALL TRAVELERS	Vacation (52%)	VFR (15%)	Business (7%)	Passing Through (21%)
Household Income	Less than \$20K	7%	5%	9%	2%	9%
	\$20K-\$39,999	17%	14%	20%	18%	19%
	\$40K-\$59,999	25%	25%	26%	22%	28%
	\$60K-\$79,999	20%	21%	19%	17%	20%
	\$80K-\$99,999	11%	10%	11%	10%	10%
	\$100,000+	21%	25%	15%	32%	14%

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

Table 9: Visitors Place of Residence

Travelers	All Travelers	Vacation (52%)	Visit friends/ Relatives (15%)	Business (7%)	Passing Through (21%)
Place of Residence	WA: 12%	CA: 11%	WA: 16%	WA: 12%	WA: 18%
	CA: 10%	WA: 9%	CA, ID: 9%	CA: 11%	ID: 9%
	ID: 6%	ALB: 6%	ND: 6%	ID: 9%	CA: 7%
	MN: 5%	UT, MN: 5%	MN, OR, WY: 5%	UT: 7%	MN, OR: 6%
	UT, ND, OR WY, CO, ALB: 4%	CO, OR, TX: 4%	CO: 4%	ND: 6%	ND: 5%
	AZ, FL, TX: 3%	AZ, FL, ID, ND, IL, WI: 3%	AZ, SD, TX, UT: 3%	CO: 5%	ALB: 4%
	WI, BC, PA, NY, MI, IL, GA: 2%	GA, IN, IA, MI, MD, NY, PA, WY, BC: 2%	ALB, FL, OH, WI: 2%	MN, OR, WY: 4%	FL, MI, PA, WI: 3%
	SASK, ONT, SD, OK, OH, NC, NM, NV, NE, MO, MA, MD, LA, KS, IA, IN, CT, TN, VA: 1%			SD: 3%	
	All other Canada*: <1%	All other Canada: 2%	All other Canada: 1%	All Canada: 4%	All other Canada: 4%
	Overseas*: 3%	Overseas: 5%	Overseas: <1%	Overseas: 1%	Overseas: <1%

*Canadian and Overseas visitor numbers were calculated from the front-end population data base rather than the sample survey since foreign visitors were less likely to return the survey form.

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

Table 10: General Trip Behavior

Travelers		All Travelers	Vacation (52%)	Visit Friends/ Relatives (15%)	Business (7%)	Passing Through (21%)
All Purposes of Trip	Vacation	72%		62%	26%	40%
	VFR	28%	19%		18%	9%
	Passing Thru	30%	14%	10%	7%	
	Business	8%	1%	3%		1%
	Shopping	6%	7%	6%	1%	2%
	Other	7%	4%	2%	2%	2%
Plan to visit in next 2 yrs.	Yes	77%	74%	88%	86%	72%
Flew on portion of trip	Yes	20%	20%	20%	43%	12%
Rent Auto	Yes	17%	20%	11%	32%	11%
Where rented	Montana	42%	39%	56%	75%	15%
	Colorado	8%	8%	6%	5%	3%
	Idaho	2%	1%	-	5%	4%
	Oregon	-	-	-	-	-
	Utah	15%	19%	-	-	20%
	Washington	12%	11%	13%	7%	18%
	Wyoming	5%	5%	9%	3%	6%
	Alberta	2%	3%	-	-	-
	British Col.	1%	2%	-	-	-
Other	13%	12%	12%	-	36%	
Hired Outfitter	Yes	6%	9%	3%	4%	-

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

Table 11: Accommodations

Travelers		All Travelers	Vacation (52%)	Visit Friends/ Relatives (15%)	Business (7%)	Passing Through (21%)
Nights in MT on this trip		4.2	4.6	5.7	7.6	1.4
If Overnight in MT, Percent of Nights Spent in Accommodation Types	Hotel/motel/B&B	46%	44%	27%	77%	66%
	Parking lot	2%	3%	1%	1%	4%
	Cabin/2 nd Home	4%	5%	3%	2%	-
	Public Campgr.	11%	16%	3%	1%	6%
	Private Campgr.	14%	16%	8%	4%	18%
	VFR Home	16%	7%	56%	8%	4%
	Rented Cabin	3%	3%	2%	-	-
	Resort/Condo	3%	4%	<1%	3%	-
	Guest Ranch	<1%	<1%	<1%	-	-
Other	1%	1%	-	4%	1%	

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

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

	All Travelers		Vacation (52%)		VFR (15%)		Business (7%)		Pass Thru (21%)	
	All	Primary	All	Primary	All	Primary	All	Primary	All	Primary
Open Space/ Uncrowded Areas	32%	10%	47%	11%	27%	6%	7%	7%	13%	12%
Mountains/forests	42%	11%	60%	10%	32%	8%	18%	10%	18%	15%
Rivers/lakes	30%	2%	44%	2%	22%	-	13%	-	8%	3%
Plains/Badlands	7%	1%	9%	-	5%	-	2%	-	5%	2%
Native Am. Culture	8%	1%	12%	1%	6%	-	1%	-	3%	1%
Lewis & Clark sites										
	8%	2%	12%	2%	7%	1%	4%	2%	3%	1%
Montana History										
	10%	3%	14%	3%	7%	2%	5%	4%	4%	4%
Family/friends										
	19%	12%	17%	4%	53%	59%	6%	7%	3%	4%
Glacier NP										
	27%	19%	42%	25%	17%	5%	6%	9%	8%	9%
Yellowstone NP										
	39%	22%	56%	25%	20%	7%	13%	11%	19%	28%
Wildlife										
	25%	1%	38%	1%	18%	-	7%	-	7%	-
Camping										
	18%	2%	27%	2%	13%	-	2%	3%	7%	3%
Fishing										
	14%	4%	21%	6%	10%	-	7%	9%	3%	-
Hiking										
	16%	1%	25%	1%	11%	-	4%	-	3%	-
Hunting										
	2%	4%	1%	1%	2%	5%	5%	18%	-	14%
Other Activity										
	8%	4%	11%	3%	4%	1%	5%	2%	2%	4%
Special Event										
	6%	4%	6%	4%	10%	6%	6%	11%	-	-

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

Table 13: Sites Visited by Travelers in Montana Over the Years

	All Travelers	Vacation (52%)	VFR (15%)	Business (7%)	Passing Through (21%)
Glacier National Park	32%	43%	26%	18%	13%
Yellowstone National Park	48%	64%	33%	22%	34%
Little Bighorn Battlefield	14%	18%	10%	7%	10%
Fort Peck Lake	3%	3%	5%	-	1%
National Bison Range	6%	7%	6%	2%	2%
Flathead Lake Area	19%	24%	21%	10%	5%
Clark Canyon Reservoir	2%	3%	2%	-	-
Gates of the Mountains	4%	4%	7%	-	1%
Lost Trail Pass	2%	2%	2%	-	1%
Bighorn Canyon Nat'l Rec. Area	6%	8%	3%	-	3%
Museum of the Rockies	5%	5%	9%	5%	2%
Lewis & Clark Interpretive Center	7%	9%	7%	6%	3%
Montana Historical Society	2%	2%	3%	2%	-
Pompey's Pillar	4%	4%	4%	-	5%
Missouri Headwaters	5%	5%	7%	4%	4%
Lemhi Pass	1%	2%	2%	-	-
CM Russell Nat'l Wildlife Refuge	3%	3%	3%	-	1%
Lolo Pass Interpretive Center	3%	3%	3%	2%	2%

Table 14: Selected Sites Visited While in Montana on this Trip*

	All Travelers	Vacation (52%)	VFR (15%)	Business (7%)	Passing Through (21%)
Glacier National Park	15%	23%	7%	5%	3%
Yellowstone National Park	27%	33%	13%	15%	18%
Little Bighorn Battlefield	3%	3%	3%	2%	2%
Flathead Lake Area	9%	13%	10%	2%	4%

*Visitation numbers to these four sites were adjusted in the database to reflect actual travel patterns and more closely represent visitation numbers to the park and along the highways.

Table 15: Sources of Information Used to Plan Trip*

	All Travelers		Vacation (52%)		VFR (15%)		Business (7%)		Pass Through (21%)	
	All items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Internet	43%	38%	53%	38%	30%	43%	34%	39%	37%	35%
Auto Club	26%	25%	30%	24%	17%	25%	13%	9%	31%	36%
Travel Agency	4%	3%	4%	2%	3%	3%	13%	14%	2%	3%
Chamber/CVB	9%	5%	14%	5%	5%	4%	5%	4%	6%	3%
MT Travel Planner	9%	6%	13%	6%	5%	5%	5%	5%	3%	3%
Nat'l Park Brochure	18%	7%	26%	9%	8%	7%	4%	3%	11%	3%
1-800 state Number	2%	1%	2%	1%	2%	-	-	-	-	-
Guide Book	14%	10%	17%	10%	7%	7%	9%	8%	13%	11%
Private Business	9%	7%	10%	6%	5%	7%	17%	19%	5%	6%
None of these Sources	34%	-	25%	-	54%	-	44%	-	34%	-

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

Table 16: Sources of Information Used While in Montana*

	All Travelers		Vacation (52%)		VFR (15%)		Business (7%)		Pass Through (21%)	
	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Info center person	27%	29%	36%	35%	19%	23%	18%	13%	18%	19%
Billboards	12%	5%	11%	3%	10%	7%	10%	5%	18%	9%
Highway Signs	35%	26%	36%	20%	29%	30%	26%	25%	43%	39%
Brochure Rack	28%	18%	36%	21%	19%	18%	21%	18%	18%	12%
Service Person	30%	24%	34%	22%	21%	21%	34%	39%	27%	20%
None of these Sources	34%	-	28%	-	47%	-	42%	-	36%	-

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

Table 17: Activities Participated in While in Montana on this Trip*

	All Travelers		Vacation (52%)		VFR (15%)		Business (7%)		Passing Through (21%)	
	All	Primary	All	Primary	All	Primary	All	Primary	All	Primary
Picnicking	29%	7%	36%	6%	34%	9%	15%	6%	17%	14%
Camping (devlp.)	23%	10%	31%	11%	17%	7%	7%	3%	16%	14%
Camping (undeveloped)	9%	4%	12%	4%	9%	3%	4%	3%	5%	4%
Day Hiking	33%	12%	46%	14%	29%	10%	18%	9%	10%	8%
Golfing	7%	2%	7%	2%	11%	4%	9%	4%	1%	1%
Backpacking	4%	1%	6%	1%	4%	1%	2%	1%	<1%	-
Mountain Biking	3%	1%	3%	<1%	3%	1%	1%	-	1%	1%
Road/tour Biking	3%	1%	4%	1%	4%	1%	4%	3%	1%	-
Off Highway/ATV	3%	1%	4%	1%	5%	1%	1%	-	1%	1%
Fishing	16%	6%	22%	7%	18%	6%	11%	5%	1%	1%
Motor boating	4%	1%	4%	1%	7%	2%	-	-	1%	1%
Water-skiing	1%	<1%	1%	<1%	3%	1%	-	-	-	-
Canoe/Kayaking	3%	1%	5%	1%	4%	1%	-	-	-	-
Sail/Windsurf	<1%	<1%	<1%	<1%	<1%	<1%	-	-	-	-
Rafting/Floating	7%	2%	10%	3%	9%	3%	5%	1%	1%	<1%
Nature Study	12%	3%	17%	4%	11%	3%	12%	4%	4%	1%
Hunting	1%	<1%	1%	<1%	-	-	-	-	-	-
Wildlife watching	36%	13%	50%	15%	31%	9%	24%	10%	13%	9%
Sporting Event	3%	1%	3%	1%	5%	1%	1%	-	1%	-
Gambling	8%	2%	9%	1%	10%	2%	9%	5%	5%	3%
Shopping	39%	11%	45%	9%	49%	16%	31%	14%	18%	14%
Visited Sites:										
Native American	14%	3%	20%	3%	10%	2%	5%	2%	5%	3%
Lewis & Clark	15%	3%	20%	3%	14%	3%	9%	5%	8%	5%
Other History	26%	8%	35%	7%	21%	6%	21%	9%	15%	12%
Museums	20%	4%	25%	3%	20%	5%	16%	6%	9%	6%
Festivals/Events	11%	3%	12%	2%	18%	5%	18%	7%	1%	-

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

Table 18: Comments by All Visitors*

	N
General positive comments	424
Montana has nice scenery	290
Comments about specific sites	233
Would like to return	213
Miscellaneous	163
Montana has nice people	140
Highways/roads	121
Specific suggestions	99
Have been here before	98
Would like to move to Montana	52
Rest areas	50
Lived or grew up in Montana	41
Cleanliness	30
Passing through	27
Information	25
Openness/uncrowdedness of Montana	24
Prices	22
Stop developing/stay in original state of vegetation	18
Public access	17
Came for family reunion	11
Sales tax	11
Came for outdoor recreation, i.e. skiing, rafting, etc.	10
Speed limit	10
Own property in Montana	8
Shopping	6
More signage with mileage in-between cities	6

*These were responses to an open-ended request for comments submitted by respondents who chose to write in the space available on the survey

Comparison Data: Summer 1996 vs Summer 2001

Table 19 : Comparison of Expenditures: Between 1996 vs 2001*

	All Travelers 1996	All Travelers 2001	
Total # of Summer Groups	2,187,900	2,267,140	
Group Size	2.6	2.5	
# Of Nights in MT	4.5	4.2	
Average Daily Expenditures	\$108.79**	\$109.50	
Total Summer Expenditures	\$1,071,111,000	\$1,042,631,000	
Expenditure Distribution***	Restaurant/Bar	\$18.50	\$21.20
	Gas/oil	\$23.67	\$25.14
	Retail	\$27.22	\$24.18
	Hotel/motel	\$17.42	\$11.52
	Camping	\$1.67	\$2.42
	Groceries/snacks	\$8.71	\$9.59
	Auto Rental/ repair	\$5.08	\$7.23
	Transportation	\$0.53	\$0.14
	Misc. Services		\$0.61
	Entrance fees	\$5.99	\$3.09
	Outfitter/guide		\$4.39

*All figures are rounded.

**Dollar values have been adjusted for inflation and are reported in 2001 dollars.

***Expenditures reflect the average across all groups and do not reflect actual costs of each individual item.

Table 20: Traveler Characteristics: 1996 vs 2001

Travelers		All Travelers 1996		All Travelers 2001	
Travel Group Type	Couple	38%		41%	
	Self	17%		14%	
	Family	34%		32%	
	Family/Friends	3%		5%	
	Friends	7%		6%	
	Bus. Assoc.	1%		1%	
	Org. Group	<1%		1%	
Visited MT Before?	Yes	75%		76%	
Seasons Visited Before	Spring	46%		30%	
	Summer	88%		68%	
	Fall	53%		34%	
	Winter	39%		25%	
Place of Residence	WA:	13%		WA:	12%
	CA:	9%		CA:	10%
	ID:	6%		ID:	6%
	WY, CO:	5%		MN:	5%
	MN,OR, UT, ND	4%		UT, ND, OR, CO, WY, ALB:	4%
	ALB, TX	3%		FL, TX:	3%
	AZ, FL, IL, MI, NV, WI:	2%		WI, BC,PA, NY,MI, IL, GA:	2%
	All other Canada:	4%		All other Canada:	2%
	Overseas:	5%		Overseas:	3%
Reasons for Trip in Montana*		1996 All Reasons	1996 Primary Reason	2001 All Reasons	2001 Primary Reason
	Vacation	77%	49%	72%	52%
	Passing Thru	31%	21%	30%	21%
	VFR	31%	16%	28%	15%
	Business	10%	6%	8%	7%
	Shopping	9%	1%	6%	1%
	Other	9%	4%	7%	4%

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

Table 21: Attractions to the State: 1996 vs 2001

	All Travelers 1996		All Travelers 2001		Vacationers 1996		Vacationers 2001	
	All	Primary	All	Primary	All	Primary	All	Primary
Open Space/ Uncrowded Areas	31%	6%	32%	10%	41%	4%	47%	11%
Mountains/forests	51%	12%	42%	11%	69%	9%	60%	10%
Rivers/lakes	35%	1%	30%	2%	49%	<1%	44%	2%
Native Am. Culture	10%	1%	8%	1%	14%	<1%	12%	1%
Montana History	11%	1%	10%	3%	14%	1%	14%	3%
Glacier Nat'l Park	31%	25%	27%	19%	50%	32%	42%	25%
Yellowstone NP	39%	22%	39%	22%	58%	24%	56%	25%
Wildlife	28%	2%	25%	1%	41%	2%	38%	1%
Camping	19%	2%	18%	2%	28%	2%	27%	2%
Fishing	14%	6%	14%	4%	20%	7%	21%	6%
Hiking	15%	1%	16%	1%	23%	1%	25%	1%
Special Event	4%	4%	6%	4%	5%	3%	6%	4%

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

Table 22: Sources of Information Used to Plan Trip: 1996 vs 2001

	1996		2001		1996		2001	
	All Travelers		All Travelers		Vacationers		Vacationers	
	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Internet	5%	3%	43%	38%	7%	3%	53%	38%
Auto Club	31%	39%	26%	25%	37%	34%	30%	24%
Travel Agency	NA	NA	4%	3%	NA	NA	4%	2%
Chamber/CVB	7%	5%	9%	5%	10%	6%	14%	5%
MT Travel Planner	13%	12%	9%	6%	20%	15%	13%	6%
Nat'l Park	20%	11%	18%	7%	32%	13%	26%	9%
1-800 state #	7%	4%	2%	1%	12%	5%	2%	1%
Guide Book	22%	19%	14%	10%	30%	19%	17%	10%
Private Business	7%	6%	9%	7%	9%	5%	10%	6%
None of these sources	40%	-	34%	-	26%	-	25%	-

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

Table 23: Sources of Information Used While in Montana: 1996 vs 2001

	1996		2001		1996		2001	
	All Travelers		All Travelers		Vacationers		Vacationers	
	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Info center person	26%	22%	27%	29%	40%	29%	36%	35%
Billboards	10%	2%	12%	5%	10%	1%	11%	3%
Highway Signs	35%	19%	35%	26%	40%	14%	36%	20%
Brochure Rack	33%	15%	28%	18%	44%	18%	36%	21%
Service Person	36%	24%	30%	24%	45%	24%	34%	22%
None of these sources	24%	-	34%	-	15%	-	28%	-

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

Table 24: Comparison of Activities Participated in While in Montana

	1996 All Travelers	2001 All Travelers
Picnicking	26%	29%
Camping (developed)	28%	23%
Camping (undeveloped)	10%	9%
Day Hiking	29%	33%
Fishing	15%	16%
Rafting/Floating	6%	7%
Nature Study	9%	12%
Wildlife Watching	45%	36%
Golfing	5%	7%
Gambling	10%	8%
Shopping	32%	39%
Visited Sites:		
Native American Sites	10%	14%
Lewis & Clark Sites	29%	15%
Other History Sites		26%
Museums	21%	20%
Festivals/Events	8%	11%

Summary and Discussion

Summary

The results of the summer nonresident study bring out a number of interesting marketing opportunities, policy challenges, and questions. This section includes a discussion of what the results mean, a look at trends, as well as recommendations for marketing, policy decisions, and further research. Trends will be analyzed when comparing the 1996 nonresident summer visitor to the 2001 summer visitor. Recall that summer refers to the four months of June, July, August, and September. The previous ITRR summer study in 1996 used these same four months providing an excellent opportunity for comparison of certain variables over the years.

Summer Expenditures/Group Size/Length of Stay

(Table 1; p. 4)

The top three expenditures categories were gasoline at \$25.14/group per day, retail at \$24.18/group per day, and restaurant/bar at \$21.20/group per day. While overall daily expenditures increased in 2001 compared to 1996, two major categories decreased: Hotel/motel and Retail. In the 1996 summer survey retail was the highest expenditure category followed by purchases of gasoline. It is apparent that higher gas prices seen in the past few years are now taking a larger portion of the nonresident dollar. This is not an unexpected trend, but can be potentially damaging to the economic impact provided by nonresident dollars since less of the gas price goes back into the community.

Another interesting twist is that while there has been a decrease in hotel expenditures, there has been a corresponding increase in camping expenditures. We can safely say that camping prices have increased. However, perhaps the most interesting change in percent of nonresident dollar expenditures is in the miscellaneous service category. In 2001 it was divided into services, entrance fees, and guide fees while in 1996 it was reported as one category. Because of the further breakdown in expenditures, we have a better idea of where money is being spent. This category went from \$5.99 in 1996 to \$7.79 in 2001. While this is not an extravagant change, it points to a probable profile change of the nonresident visitor. This is a visitor willing to spend dollars on services including guiding fees and entrance fees. It may also reflect the federal Fee Demonstration Program where both Yellowstone and Glacier National Parks increased their entrance fees in the past couple years. The proportion of the dollar going to services, therefore, may be to the detriment of the retail category.

The total summer expenditures of \$1.042 billion is a slight decrease in overall summer expenditures of \$1.071 billion in 1996 (in 2001 dollars). Part of this change is caused by a slightly lower length of stay by nonresident visitors from 4.5 nights to 4.2 nights. In addition, an ever-so-slight decrease in group size from 2.6 to 2.5 also lowered group expenditures.

Travel Patterns

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

Survey responses for this part of the questionnaire were slightly 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, the responses on the map segments still represent basic traveler routes, but some inconsistencies may occur.

While the majority of summer travelers in Montana traveled to some extent on the Interstates, it is evident that summer travelers go beyond the Interstates. On the east-west corridors, between 19 and 39 percent of all nonresidents traveled Interstate 90, and up to 19 percent traveled parts of US2 by Glacier National Park. The most heavily traveled section of Interstate 90 was between Livingston and Bozeman (39%). The most heavily traveled section on I-94 was between Billings and Miles City with 14 to 15 percent of all nonresident traffic. Montana 200 between Great Falls and the junction with Highway 87 saw 5 to 8 percent of the nonresident traffic. Another east-west route, Going to-the-Sun-Road in Glacier National Park saw 15 percent of Montana's nonresident traffic.

The north-south routes carried significantly fewer nonresidents than the east-west routes. US89 between Livingston and Gardiner had the highest percent of travelers (19%), followed by Interstate 15 between Shelby and Great Falls with 7-13 percent of the traffic, and 13 to 14 percent who traveled US93 between Polson and Missoula. Finally, 15 percent of the traffic traveled into Yellowstone National Park from West Yellowstone.

Glacier Country Travel Region received the largest percent of overnight stays of all the travel regions in the state (33%), closely followed by Yellowstone Country with 30 percent. Custer and Goldwest Countries received 14 and 11 percent, respectively, of overnight stays. In general, the largest community in each of the regions received the highest percentage of overnights within their region. Missoula housed 20 percent of all overnights in Glacier Country while Billings housed 60 percent of all overnights in Custer Country. Great Falls saw 47 percent of all Russell Country overnights and Glasgow hosted 33 percent of all Missouri River Country overnight visitors. Butte, with 28 percent of the overnights in Gold West Country, out-hosted Helena by 10 percentage points. In Yellowstone Country, West Yellowstone had more overnights than Bozeman (23% and 19% respectively). Communities in the state who received the highest proportion of nonresidents (compared to the entire state) are Billings (9%), Missoula and West Yellowstone (7% each), Bozeman (6%), and Gardiner and Great Falls (4% each).

Places of residence for visitors to Montana show that people who reside in Washington and California come to Montana in greater percentage than any other state (12% and 10% respectively). However, the bordering states of Idaho, North Dakota, and Wyoming add up to 14 percent of all nonresidents visiting Montana in the summer months. Eight percent of all visitors were from Canada while 3 percent were from overseas.

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. The closer the mean to "1," the more satisfied the visitors. Nonresidents were satisfied with their experiences in Montana since all eight categories received a rating less than "2". Satisfaction with Montana's hospitality and service received the best rating with a mean of 1.11 and 90 percent of the respondents indicating they were satisfied. This was followed by the condition of the natural environment which received the second highest satisfaction ratings with 88 percent of all visitors saying they were satisfied with Montana's natural environment (mean satisfaction level was 1.15). At the other end, 61 percent of visitors indicated satisfaction with the availability of highway rest areas. While it still shows that more than half the visitors were satisfied, this feature received the highest dissatisfaction ratings with 11 percent being dissatisfied.

Visitors who had been to Montana in the past were asked to indicate whether certain aspects of Montana have changed over time. Since 76 percent of all summer visitors had visited the state on previous occasions, the comparisons included a significant sample of visitors. The change scale ranged

from 1 to 3 with “1” indicating that things were better, “2” meaning things were the same, and “3” meaning things were worse. A score closer to “1” indicated an improvement, while a score closer to “3” indicated a worsening condition.

A continuing trend is emerging from all travel seasons. In both the winter and spring nonresident reports (ITTR reports, RR2001-7 & RR2002-2), one aspect that appears to be worsening over-time from the point of view of visitors who have been here in the past is “Amount of open space.” Twenty-two percent of winter visitors, 18 percent of spring visitors, and 22 percent of summer visitors indicated that the amount of open space has decreased. Of all the changes over time, open space consistently received the highest percentage saying it had worsened. On the “getting better” end of the spectrum, the availability of commercial lodging received the highest number of “better” ratings from winter visitors (54%), spring visitors (40%), and summer visitors (46%). Most conditions rated by visitors received a “stayed the same” rating. In summary, 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 7-17; pp. 7-13)

Summer visitors to Montana have a variety of reasons for coming to the state. When asked to name all their purposes, vacation (72%) came out on top followed by passing through (30%), visiting friends and relatives (VFR) (28%), and business (8%). When asked to indicate the *primary* reason for visiting, vacation (52%) emerged as the dominant reason for visitors to be in Montana in the summer months. Passing through the state was the second most common reason at 21 percent, while VFR fell to only 15 percent of the visitors.

The remaining portion of the discussion will profile each group of visitor based on their primary reason for being in Montana.

Vacationers (52% of Summer Visitors – Averaged 4.6 nights in Montana)

Visitors in Montana for their summer vacation were more likely to be traveling as a couple than any other group type. Forty-five percent of all vacationers were couples. This was followed by 34 percent who were traveling as a family. While 34 percent were families, only 29 percent were traveling with children under 18. Interestingly, 26 percent of the children did not have any influence on planning the vacation, however 46 percent had some planning influence and 28 percent had a great deal of influence in the planning. Activities on the trip, however, were greatly influenced by the children. Only eight percent indicated that their children did not influence the activities in which they participated.

When planning their trip to Montana, 53 percent of vacationers used the Internet and 30 percent used the services of an auto club like AAA. The next most used planning tool was national park brochures (26%). The planning source *most* useful to the vacationer was the Internet (38%) followed by auto clubs (24%). Ten percent said a travel guidebook was their most useful source for planning. When asked to indicate sources of information used upon arrival in Montana, 36 percent of the vacationers used a person in an information center, brochure racks, and highway signs. However, the information center person was most useful to the vacationer.

Vacationers were attracted to many aspects of Montana although the two national parks, Yellowstone and Glacier were on top or close to the top of the list (56% and 42% respectively). Scenery such as mountains/forests, open space, and rivers/lakes was an attraction for 44–60 percent of the vacationers. Wildlife was an attraction for 38 percent of the vacationers. When asked to pick their one *primary* attraction to Montana, Glacier and Yellowstone National Parks each received the highest votes at 25 percent each.

Actual sites visited by vacationers while in Montana tell quite a bit about their reason for being in the state. Thirty-three percent of vacationers visited Yellowstone and 23 percent visited Glacier. The next site was the Flathead Lake area where 13 percent of the vacationers visited. Finally, three percent of the vacationers visited Little Bighorn Battlefield.

As expected, vacationers were an active group. Fifty percent watched wildlife, 46 percent day hiked and 45 percent shopped. About one-third of the vacationers went picnicking, camping in developed areas, and/or visiting historic sites about Montana. One fourth of the visitors went to a museum and one-fifth went fishing, and/or visiting Native American as well as Lewis and Clark historic areas. Finally, nine percent of all vacationers hired an outfitter or guide while in Montana.

Seventy percent of summer vacationers had been to Montana in the past although 22 percent had only been to the state just once before this visit. Summer was the season these visitors had been to Montana over all other seasons (62%).

Vacationers were more likely to come from California (11%), Washington (9%), or Minnesota, Utah and Alberta (5% each). Ten percent of the vacationers were from Canada and five percent were from overseas. While the income of vacationers varied, one fourth had an income of over \$100,000 and another 25 percent had incomes between \$40,000-\$59,999. Twenty-one percent had incomes of \$60,000-\$79,999.

Vacation was their primary reason for being in Montana, but 19 percent of the vacationers were also visiting family/friends during their stay. Fourteen percent were also traveling through to vacation in other spots outside Montana. Seventy-four percent of the vacationers said they would return to Montana in the next two years.

Twenty percent of the vacationers flew on some portion of their vacation. Of those who flew, 20 percent rented a car but only 39 percent of those visitors rented vehicles in Montana. The remaining vehicles were rented in surrounding states with Utah (19%) and Washington (11%) being the most likely places to rent a vehicle. Forty-four percent of vacationer nights were spent in hotel/motel/B&Bs while another 16 percent was spent in both public and private campgrounds to total 32 percent of nights in campgrounds.

VFR (15% of Summer Visitors – Averaged 5.7 nights in Montana)

People in Montana to visit friends or relatives for their summer vacation were more likely to be traveling as a family than any other travel group type. Thirty-nine percent of all VFR were family groups. This was followed by 34 percent who were traveling as a couple. While 39 percent were families, only 27 percent were traveling with children under 18. Interestingly, nearly half (49%) of these children did not have any influence on planning the trip. Activities on the trip, however, were more likely to be influenced by the children. Seventy-three percent of the VFR traveling with children said the children had some or a great influence on the activities they did on the trip.

When planning their trip to visit friends/relatives in Montana, 54 percent of VFR visitors did not use any source of information for their trip while 30 percent used the Internet and 17 percent used an auto club. Those who did use information indicated that the Internet was their most useful source (43%) or the auto club (25%). Again, while in Montana, 47 percent did not use any information sources in the state but about 29 percent used highway signs, 21 percent used service people, and 19 percent used an info center person or a brochure rack. When information was used, highway signs were the most useful source for VFR visitors.

Unlike vacationers, VFR visitors were not attracted to the state for many reasons. Obviously, visiting family and friends was the major attraction (53%). In addition to visiting family/friends, about one-third of VFR visitors were attracted to Montana's mountains/forests (32%), open spaces/uncrowded areas

(27%) and rivers/lakes (22%). Only one-fifth of VFR visitors were attracted to Yellowstone and slightly fewer than that (17%) were attracted to Montana because of Glacier National Park. When looking at the actual sites visited, 13 percent of VFR visitors went to Yellowstone and 7 percent went to Glacier. Another 10 percent visited Flathead Lake.

More VFR visitors spent time shopping while in Montana (49%) than any other activity. This was followed by visitors picnicking (34%), watching wildlife (31%), and day hiking (29%). About one-fifth of the VFR visitors visited historic sites (21%) or a museum (20%) while in Montana.

Interestingly, but not surprisingly, 44 percent of VFR visitors have lived in Montana before and 91 percent had visited the state previously with most of them (23%) having been to the state over 20 times in the past. The majority had been to Montana in the summer (85%) but nearly half of all VFR visitors have also been to the state in all the other seasons (spring, fall, and winter).

The greatest segment of VFR visitor currently lives in Washington (16%) followed by Idaho and California (9% each). Six percent come from North Dakota and five percent each come from Minnesota, Wyoming, and Oregon. VFR visitors generally have less of an annual income than vacationers with 26 percent make \$40,000-\$59,999 per year and about one fifth make \$20,000-\$39,000 or \$60,000-\$79,999 per year. Only 15 percent make over \$100,000 per year while 25 percent of vacationers earn that amount of income.

VFR visitors were in Montana primarily to visit their friends/relatives, but 62% of them also said this was their vacation. Only 10 percent said they were passing through the state.

Twenty percent of the VFR visitors flew on some portion of their vacation. Eleven percent of those who flew rented a vehicle and the vehicle was most likely rented in Montana (56%). Not unexpectedly, 56 percent of VFR visitor nights were spent in private homes, however, a significant number of nights were spent in hotel/motel/B&Bs (27%) while another 23 percent was spent in private campgrounds.

Passing Through (21% of Summer Visitors – Averaged 1.4 nights in Montana)

This group of visitors, while a significant number (21% of all summer visitors) did not impact the state very much in terms of length of stay, activities, or sites visited. As suggested by their title, they are simply passing through the state. Eighteen percent of the pass-through visitors visited Yellowstone National Park while only three percent visited Glacier National Park. The Yellowstone visitors claiming to pass through Montana could easily have barely touched Montana in that many travelers simply go to Gardiner from the Park or from Idaho through West Yellowstone to enter the Park. Their length of stay in Montana is very short.

While 72 percent of visitors passing through the state do plan on returning to Montana, and 66 percent of their nights (which was only one night) was spent in a hotel/motel/B&B, they are not in the state long enough to be active. At the most, 18 percent went shopping, 17 percent went on a picnic, 16 percent camped and 15 percent visited a Montana historic site.

Business (7% of Summer Visitors – Averaged 7.6 nights in Montana)

Visitors to the state primarily here on business were a small number of visitors (only 7% of all summer visitors), but spent the longest time period of any visitor group (7.6 nights) with 77 percent of their nights spent in a hotel/motel/B&B. More business visitors are in the highest income bracket (32% earn over \$100,000) compared to other visitor groups, and they generally traveled alone (49%).

Eighty-seven percent of business visitors have been to Montana in the past and 86 percent will return in the next two years. Compared to all the other visitor groups, the business visitor was more likely to travel by air for a portion of their trip (43%) and one-third of them rented a vehicle (three-fourths rented that vehicle in Montana).

Business visitors who were also here on vacation (26% of the 7% of business visitors) did not indicate that they were attracted to the state by very many of Montana's attractions or activities. However, an interesting number (18%) did indicate they were attracted primarily because of the hunting opportunities. While none of these visitors actually did hunt on this trip, 24 percent did watch wildlife. It could be speculated that some of these business visitors would return to hunt in the fall.

Other activities engaged in by business visitors were shopping (31%) and visiting historic areas (21%). In general, business visitors were not a very active group.

Traveler Trends

(Tables 19-24, pp 15-18)

A comparison of visitors from 1996 to 2001 indicates that few changes have occurred. In other words, the nonresident visitor profile, while slightly different in some aspects, is still the same. However, the slight changes will be profiled here.

- The number of couples (group type) increased from 38 percent to 41 percent and families decreased by two percentage points.
- Summer visitors continue to return to Montana at the same rate (76% were repeat visitors in 2001 while 75% were repeat in 1996).
- Twenty-eight percent of all visitors came from Washington, California and Idaho in both years. The one noticeable change was the re-emergence of Alberta visitors, comprising four percent of visitation in 2001.
- The reasons for visiting Montana stayed in the same pattern with vacation as the top primary reason followed by passing through, visiting friends and relatives and business. There was a three percentage point increase in vacationers over 1996.
- The top attractions to Montana have remained the same with some increases or decreases in percent of visitors attracted by certain things. Mountains/forests, Yellowstone and Glacier National Parks, Rivers/lakes, and open space/uncrowded areas continue to be the top attractions to Montana.
- Activities participated in also remained stable over the years with wildlife watching and shopping topping the activity list. However, wildlife watching decreased by nine percentage points in 2001 while shopping increased seven percentage points. Perhaps the most telling change is in the increase of visitors who engaged in some form of historic/cultural site or museum visitation. While the categories were not exactly the same in the two years, it still appears that history is becoming a larger portion of the nonresident itinerary.
- The most significant change in nonresident visitor behavior between 1996 and 2001 was in the information planning stages. In 1996 only five percent of all visitors used the Internet for planning purposes and only three percent said it was the most useful information source. By 2001, 43 percent of the visitors used the Internet, and 38 percent said it was their most useful source of information. Vacationers even used the Internet in higher proportions where 53 percent used the Internet for planning. This change in behavior suggests that visitors want their information now and expect it to be up-to-date. In most cases it appears as if Montana travel information on the Internet is very useful to the visitor.

Discussion

In this section we will discuss how this information about nonresident summer visitors could be used by marketers and decision makers, as well as where more research is needed. We remind the readers that this discussion is simply that – discussion related to the data. Program 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 programs and marketing decisions.

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, 77 percent of all visitors said yes. This included 74 percent of vacationers who indicated they would return in two years and 88 percent of VFR visitors with the same intentions. Marketing to repeat visitors should be a regular program within Montana's promotion division, all travel regions and CVBs, as well as for 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. The highest satisfaction rating came in the hospitality and service category where 90 percent of all visitors said they were satisfied. 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 an effort to keep visitors returning each year, it is useful to know where they reside. Summer vacationers (the group marketers are really after) came from Washington and California, followed by Minnesota, Utah, and Alberta. Colorado, Oregon and Texas made up a smaller share of nonresident visitors. These are known geographic markets that work and marketing efforts should continue there.

On the other end of the spectrum, it is recommended that marketing into new areas be researched. Since 70 percent of all vacationers had been to Montana in the past, perhaps a smaller emphasis, albeit a consistent message, be provided to potential repeat visitors, but then focus on the new markets. In other words, do not forget about the repeat visitor, but spend more effort on the new markets. The new markets could be geographically selected or selected by psychographics, namely interests and activities. Summer vacationers are primarily attracted to Montana's Yellowstone and Glacier National Parks (25% for each park). The parks received the highest number of people who said that was what attracted them. 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. Montana has historically drawn on the two national parks as the "pull" to the state and rightfully so. National parks are glorified in books, documentaries, movies, and more. The idea is to place the national parks as bait. When they bite and come, it will be easier to get them to return in the future (if their first trip was a good one).

The "home-base tour" marketing strategy that has been used in other states should be researched for Montana. As one studies the travel patterns of visitors, it is obvious that the larger towns with the most lodging available are where visitors congregate. This, however, does not encourage visitation to the rural areas. A home-base tour takes the idea that visitors can spend their evenings in the same motel for a number of days and explore the area on day trips in and out of their room. The tours would be marketed from all the major communities in the state but guide visitors to the less visited rural areas. It is a win/win situation in that many rural areas cannot house large numbers of people, but they still want visitors. By providing the visitors with the idea, the route, and things to do, it is more likely that visitation will occur in those lesser-visited areas.

Another marketing strategy could be aimed at the business traveler. This group of people, while small in number, stay a very long time in the state. Whether or not they are willing to stay longer is the big question. What is known is that currently 26 percent of visitors here on business are also vacationing. Perhaps a marketing campaign with the Montana Inn Keepers Association could be developed. One strategy is to send promotional materials to people when they reserve a room for the night. The information could sway the individual to stay a bit longer. Or maybe the promotional material would get into the hands of other family members and they could then suggest "going along" on the trip. The strategy is to make clever suggestions to people you know are already coming to the state.

As stated in the Nonresident Winter Visitor report (RR2001-7) and spring report (RR2002-2), Montana's promotional division has been a leader in using the Internet to encourage visitation to the state. Apparently it is working. In planning a trip, the Internet was touted as the number one planning tool by all visitor groups. Forty-three percent of all visitors used the Internet for planning, and 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. 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.

Marketing to visitors once they have arrived in the state is always good strategy. In past nonresident studies by ITRR (Research Report 51), it has been learned that over 50 percent of all visitors are somewhat or very flexible in their travel plans. With that in mind, all one has to do is to make sure information is always available to visitors once they are here. Brochure racks should be available in all areas where visitors congregate, i.e. motel lobbies, rest areas, CVB/chamber offices, attraction entrances, museums, and so on.

Finally, an interesting trend is emerging in Montana. Visitors are increasingly spending some time at Montana's historic areas, be they Montana history sites, Lewis and Clark sites, Native American sites, or museums. Up to 26 percent of the summer visitors did something related to history/culture and 35 percent of vacationers visited history/cultural sites. This could be a result of the aging of the baby boomers who are starting to see history as an important aspect of a vacation. It is an encouraging sign as it tells us that while the outdoors is a draw, so too, is Montana's history. At this point it is not the primary draw to the state, but culture and history provide options to visitors. It is important, therefore, to provide cultural/historic information in all brochures and promotional avenues conducted about Montana.

Program Development

It is important to step back and look at what is working and what could be improved in terms of the tourism industry in Montana. First of all, there are very few guidelines or policies directly related to the tourism industry in Montana. The obvious one is the promotion of nonresident visitation to the state. This policy is in place as an economic development tool and is set up to use collected bed-tax dollars as the promotional budget. Nonresidents bring "new" money into the state. From an economic point of view, "new" money rather than money simply shuffled around the state provides additional business opportunities. This is the tourism economic policy within the state. As ITRR reports have mentioned in the past, visitors spend money in the state on retail and other items that are not taxed. It is strongly suggested that the state of Montana look into the prospect of retaining some tax money directly from the visitor. Some of this additional money could be spent in other areas related to tourism impacts, e.g. social and environmental.

Montana has very few programs related to the social and environmental impacts of tourism and the associated quality of life in the state. It can be said that people live in Montana partly for the environment. Whether it is the wide-open spaces and rural areas or the beauty of the mountains and forests, the majority of residents would say these are some of the things they like about Montana. Not surprisingly, this is also what nonresidents like about Montana. When we look at visitors primarily in Montana for vacation, 60 percent are attracted to Montana's mountains and forests, 47 percent are attracted to the open space/uncrowded areas, 44 percent are attracted to the rivers/lakes, and 38 percent are attracted to Montana's wildlife.

How do we preserve what people are attracted to? Some ideas include education, fees, or various forms of restrictions. For example, educating visitors about the environment and how to treat it is one possibility. Perhaps an educational campaign designed in cooperation with various land managing agencies could be developed and aimed at the visitor. The idea of a visitor "code of ethics" is not new and could be used in promotional materials. For example, guides and outfitters in British Columbia have agreed upon a visitor code of ethics that they in turn share with their clients, teaching them how to conduct themselves in a manner not harmful to the land. Many Montana innkeepers already have the "do not wash my sheets/towels" option for visitors who stay more than one night. A code of ethics or some other education campaign is an opportunity to show the visitor that our environment is important. When people understand how certain behaviors can benefit or be a detriment to the environment or their experience of it, they may change their behavior to that which is more accepted.

Beyond education, there is the concern that to protect Montana, additional money might be needed. Collecting additional money for environmental protection would be a difficult sell. However, there are some options. For example, organizations, the tourism industry, or the state could impose an "eco-tourism" fee where some of the money generated from a fee on items such as souvenirs and guided trips would go back into preservation of the land, as well as trail development and other outdoor activity development needs. The concept of eco-tourism is supposed to help preserve areas as well as help the local communities. This approach could work in Montana and both residents and nonresidents would benefit. This would be a new funding source, not one that takes away from the current state general fund or bed tax dollars, and therefore would not be detrimental to other services.

Another idea would be to encourage the continuation of the "fee demonstration" project at the federal level. This project has allowed both Glacier and Yellowstone National Parks to keep some of the entrance fee collections for park improvements. While this is only at the federal level and only in certain areas and types of land, it may be an option for other land managing agencies. Again, additional fees for users is not a popular suggestion, but may, in fact, help in land preservation.

Another suggestion, one that is rarely popular, is the imposition of restrictions on use of the land. Many times land managers find they have to restrict use in order to protect the environment. Some restrictions are caused by the presence of endangered or threatened species such as the Artic Grayling in the Big Hole River. Others are based on the health of the eco-system in question, aiming to protect water or air quality. Some restrictions are imposed so the *visitor* has a good experience, as in restrictions on rivers like the Smith or the Grand Canyon. Without limiting numbers on the rivers, one could conceivably walk from raft to raft while floating and never get wet. This is an exaggeration, but does have merit. This kind of restriction is a type of guarantee that the experience will be good for those who get to participate.

While the above are just a few suggestions related to land preservation and hence the reason vacationers come to Montana, many other ideas are likely to surface. It is recommended that the tourism industry and land managers find more ways to cooperate to preserve our environment. These groups could pro-actively work together to design programs related to preserving both the environment and the tourism industry. Suggested program ideas could begin with Montana Tourism & Recreation Initiative (MTRI), a group of land managers and tourism organizations who currently meet three times per year. The agenda for this group could include a discussion on the strategies suggested as well as other strategies for the joint effort of preserving the reason why people live in Montana and visit Montana.

Another argument for the above program development is to look at the nonresident visitor reply to changes that have occurred in Montana. Once again, as in the winter and spring reports, when visitors were asked to tell us what has changed, open space and the condition of the natural environment have received the most ratings of a "worsened" condition. Twenty-two percent of nonresidents believe that the amount of open space has "worsened" and eleven percent believe the condition of the natural environment as well as wildlife opportunities have "worsened". While the majority of respondents indicated that conditions were "the same" or "better," these numbers should serve as a red flag. If the environment is why people come and why people live here, yet it appears to some that it is deteriorating, there is a potential problem down the line.

Therefore, from a program development standpoint, Montana needs to look beyond the economic development function of tourism and start building a strategy for preserving what we have. This is a win/win plan. If the environment is protected, people will continue to come visit and thereby continue to drop new money in the state which in turn makes it a smart economic development strategy. If our primary attracting features are allowed to deteriorate, it will not take long before they are not attracting features anymore.

One final program suggestion relates to transportation and information needs of nonresidents. While the Department of Transportation already has a master plan addressing rest areas and visitor centers, it appears as if nonresidents' needs are not being met as well as they could. For example, 11 percent of nonresidents were dissatisfied with rest areas. Most people would turn that around and say, "but 89 percent are okay with the rest areas." This is true, but rest areas receive the highest number of unsolicited complaints in our comments section (50 comments written down complaining about the rest areas). In most states, rest areas and visitor centers are housed in one building. These centers are located immediately off the Interstate and usually do not require the visitor to travel into a community to stop. It is simply a matter of convenience. These consumers expect easy-off /easy-on access and want it in Montana. Montana does not provide this convenience.

In addition, data from summer vacation visitors shows that people in visitor centers are the most trusted source of information. Thirty-six percent of vacationers used this information source along with highway signs and brochure racks and 35 percent said people in information centers were the most useful source, yet the state of Montana does not have many of these centers. While the *Montana Promotion Division* supports eight visitor centers in communities near the state borders, these centers need funding and support from additional sources to adequately serve the visitor's needs. But again, traveling into a community is not convenient and therefore the visitor information center and rest area program might need to be re-evaluated. Without visitor centers at the borders and immediately off the Interstates, Montana is missing a big opportunity. This is an economic development tool to get people to stay, play, and pay more while here.

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 in each of the three seasons analyzed to date, 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 explored.

An area of research that may be difficult to delve into, but interesting none the less, is to find out why people flew into cities outside of Montana and then rented a vehicle to visit the state. Were they unable to fly into Montana because of full flights or did they choose to fly elsewhere? In other words, are there access barriers by air, a lack of rental cars in Montana, or other barriers?

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 and 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. Visiting 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)
- 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. Wildlife
 - 4. Adventure/Outdoor
 - 5. Shopping
 - 6. Snow-capped mountains
 - 7. Mountains/forests
 - 8. Warm weather
 - 9. Special events
 - 10. Northern Great Plains/Bozeman
 - 11. Entertainment/Amusement Park
 - 12. Cross-country skiing
 - 13. Cultural history
 - 14. Game & Fish/State Parks
 - 15. Camping
 - 16. Fishing
 - 17. Special event
- 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)
- 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. Montana
 - 2. Idaho
 - 3. Oregon
 - 4. Washington State
 - 5. Alberta, Canada
 - 6. British Columbia, Canada
 - 7. 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.
- 12) 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

SAMPLE

- 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. Automobile rental agency
 - 3. Chamber of Commerce
 - 4. Airline Travel Planner
 - 5. National Geographic Magazine
 - 6. In-flight entertainment
 - 7. Travel agent
 - 8. Travel agent website
 - 9. Travel agent brochure
 - 10. Travel agent website
 - 11. Travel agent brochure
 - 12. Travel agent website
 - 13. Travel agent brochure
 - 14. 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.
- 15) While in Montana, where did you receive Montana travel information? (Please fill in circles for all that apply)
- 1. Travel agent
 - 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.

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

- None
- 1 activity/destination site
- 2 activities/destinations sites
- 3 activities
- 4 activities
- 5 activities
- 6 activities
- 7 activities
- 8 activities

- 9 activities/destinations sites
- 10 activities/destinations sites
- 11 activities/destinations sites
- 12 activities/destinations sites
- 13 activities/destinations sites
- 14 activities/destinations sites
- 15 activities/destinations sites
- 16 activities/destinations sites
- 17 activities/destinations sites
- 18 activities/destinations sites

- 19 activities/destinations sites
- 20 activities/destinations sites
- 21 activities/destinations sites
- 22 activities/destinations sites
- 23 activities/destinations sites
- 24 activities/destinations sites
- 25 activities/destinations sites
- 26 activities/destinations sites
- 27 activities/destinations sites
- 28 activities/destinations sites

18) On the activities you marked in 17), please enter the corresponding number and fill in the oval below it for the group members' activities over group participation in order to Myanmar.



19) Please rate your overall satisfaction with the following conditions in Myanmar. (Please do not rate the last question.)

Level of Satisfaction	Very Dissatisfied	Dissatisfied	Satisfied	Very Satisfied
Level of safety				
Level of food quality				
Level of service quality				
Level of overall experience				
Availability of travel information				

20) Have you ever shared Myanmar before this trip?

- YES NO NA (not please say to question 24)
- 20a) If yes, how many visits in the past 5 years? (Please fill response)
 - 1 visit 2 visits 3 visits 4 visits 5 visits 6-10 visits 11-20 visits 21+ visits

20b) In what seasons have you shared during the past 10 years? (Please fill in multiple if it apply.)

- Spring Summer Fall Winter

20c) Please indicate how your best Myanmar has changed over time for the following features. (Please do not rate the next feature.)

Best Myanmar	Worse Myanmar	Same Myanmar	Don't Know
Historical sites			
Historical and culture			
Historical and nature			
Availability of Myanmar information			
Availability of lodging services			
Availability of cultural experiences			
Availability of food services			
Availability of travel information			
Availability of safety services			
Availability of transportation services			
Availability of service quality			
Availability of overall experience			

21) Which of the following sites have you or the group visited in Myanmar? (Please do not rate the last site.)

- Bagan Mandalay Yangon
- Inle Lake Bhamo Loi Tai Leng
- Bhamo Mandalay Yangon
- Bagan Mandalay Yangon
- Bagan Mandalay Yangon
- Bagan Mandalay Yangon
- Bagan Mandalay Yangon
- Bagan Mandalay Yangon
- Bagan Mandalay Yangon
- Bagan Mandalay Yangon

22) Are you traveling with children under 18 years old?

- YES NO

22a) If yes, how much did the children believe... (The meaning of this question is not clear from the image)

23) What best describes your annual household income in US dollars?

- \$0-\$9,999 \$10,000-\$19,999 \$20,000-\$29,999
- \$30,000-\$39,999 \$40,000-\$49,999 \$50,000-\$59,999
- \$60,000-\$69,999 \$70,000-\$79,999 \$80,000-\$89,999
- \$90,000-\$99,999 \$100,000+

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

