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# **Nonresident *WINTER* Visitor Profile**

A study of Winter Visitors to Montana

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Research Report 2001-7

December 2001

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Recreation Research**

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# **Nonresident *Winter* Visitor Profile**

by

Norma Nickerson, Ph.D.

Thale Dillon, M.S.

Research Report 2001-7  
December 2001

Institute for Tourism & Recreation Research  
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## Table of Contents

<b>Acknowledgements</b> .....	i
<b>Executive Summary</b> .....	ii
<b>Chapter 1: Introduction</b>	
Introduction .....	3
Methodology .....	4
Study Population .....	4
Population Estimation Model .....	4
Survey Methodology and Response Rates .....	4
<b>Chapter 2: Results</b>	
All visitors .....	6
Trip Satisfaction and Changes Noted by <i>WINTER</i> Visitors .....	8
Demographic Characteristics of <i>WINTER</i> Visitors: All visitors and by Purpose of Trip.....	8
Trip Characteristics of <i>WINTER</i> Visitors: All Visitors and by Purpose of Trip.....	10
Comparison Data: Winter 1998 / Winter 2001 .....	14
<b>Chapter 3: Summary, Discussion &amp; Recommendations</b>	
Summary and Discussion .....	18
Winter Expenditures .....	18
Travel Patterns .....	18
Satisfaction and Changes Observed .....	19
Travel Behavior.....	19
Trends.....	20
Recommendations .....	22
Policy .....	22
Marketing.....	23
Future research.....	24

## List of Tables

### All Visitors

Table 1: Trip Expenditures – Winter 2000-2001.....	4
Table 2: Percent of Overnight Stays by Region.....	4
Table 3: Percent of Overnight Stays for Selected Communities.....	5
Table 4: Percent of Nonresidents on Specified Highway Segments.....	5

### Trip Satisfaction and Changes Noted by Winter Visitors

Table 5: Satisfaction with Montana Conditions.....	6
Table 6: Changes Seen Over Time by Returning Visitors.....	6

### Demographic Characteristics of Winter Visitors: All visitors and by Purpose of Trip

Table 7: Reasons for Visiting Montana.....	6
Table 8: Demographic Comparison of All Winter Travel Groups and Those Categorized by Primary Reason for Visiting Montana.....	7
Table 9: Visitors Place of Residence.....	8

### Trip Characteristics of Winter Visitors: All Visitors and by Purpose of Trip

Table 10: General Trip Behavior .....	8
Table 11: Accommodations .....	9
Table 12: Winter Attractions to Montana for those who Indicated Vacation as One Reason for trip.....	9
Table 13: Sites Visited While in Montana.....	10
Table 14: Sources of Information Used to Plan Trip .....	10
Table 15: Source of Information Used While in Montana.....	10
Table 16: Activities Participated in While in Montana on this Trip.....	11
Table 17: Comments by all Visitors.....	12

### Comparison Data: Winter 1998/ Winter 2001

Table 18: Expenditure Comparison Between 1998 and 2001 Winter Visitors .....	12
Table 19: Travel Characteristics: 1998 vs 2001 .....	13
Table 20: Winter Attractions to Montana: 1998 vs 2001 .....	14
Table 21: Sources of Information used to Gather Information for the trip: 1998 vs 2001 .....	14
Table 22: Activities Participated in While in Montana: 1998 vs 2001 .....	15

### Comparison Data: Winter 1993, 1998, 2001

Table 23: Winter Travel Group Comparison Between 1993, 1998, 2001.....	19
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Finally, thanks go out to the customs and immigration officials at the northern borders of Montana who assisted our surveyors by requesting nonresidents to pull over and talk to our surveyors.

## Executive Summary

### Nonresident Winter Travelers to Montana: 2000-2001

- Nonresident visitors to Montana were intercepted at gas stations and airports, December 2000 through March 2001. There were 1,258 initial interviews conducted and 477 people returned the full questionnaire in the mail for a 38% response rate.
- The most common primary purpose for visiting Montana was passing through (29%) followed by vacation (23%), business (18%), and visiting friends and relatives (16%).
- The “typical” nonresident winter visitor spent \$110.94/day, stayed 3.1 nights, had 2.4 people in their travel party and a household income of \$60,000-\$80,000.
- Visitors were most likely to be from North Dakota and Wyoming followed by Washington state and Alberta. Ninety-five percent had been to Montana in the past and 96 percent planned to visit again in the next 2 years.
- Vacationers and those passing through the state tended to travel as couples while those visiting friends and relatives, as well as people here on business, tended to travel alone.
- Only 18 percent of all winter visitors were traveling with children under 18 and most of those visitors were simply passing through the state.
- Yellowstone National Park was visited by 31 percent of all vacationers while the Flathead Lake area was visited by 23 percent of vacationers. People visiting friends/relatives tended to visit Little Bighorn Battlefield (20%) and Yellowstone National Park (14%). People passing through the state did not spend time visiting sites in Montana during the winter.
- Twenty-two percent of the visitors flew for part of their trip. Those who drove stayed on the Interstates. Interstate 90 between Billings and Bozeman was the highest traveled road segment in the state with 33 percent traveling that area. US191 between Bozeman and Big Sky was the two-lane road with the highest volume of nonresident travel (12%).
- Custer Country Travel Region accommodated more overnights (29%) than any other travel region, and visitors stayed overnight in Billings (32%) more often than in any other community in the state.
- In pre-trip planning, visitors felt that the private businesses (36%), followed by the Internet (35%), provided the most useful information. Information used while in the state came from service people (30%) or from highway signs (20%).
- Shopping was the activity participated in most (41%) followed by downhill skiing and gambling (12% each).
- Visitors were satisfied with all eight travel conditions which included: 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.
- Twenty-two percent of nonresidents believe that the amount of open space has decreased over time, yet most nonresidents were attracted to Montana because of the open space and uncrowded areas (22% of all travelers and 42% of vacationers).
- Changes in visitor behavior between 1993 and 2001 show a slight decrease in visiting friends and relatives (from 20% to 16%). Changes between 1998 to 2001 show an increase in use of the Internet (from 9% to 23% in).
- The number of visitors participating in some activities has declined substantially. Snowmobiling dropped from 19 percent to 6 percent from 1998 to 2001. In the past four years wildlife watching dropped from 24 percent to 17 percent and downhill skiing dropped from 20 percent to 12 percent. Gambling dropped from 16 percent to 12 percent from 1993 to 2001.
- Visitation levels to Yellowstone National Park remained at 13 percent over the years while winter visitation to Glacier National Park increased ( 2% in 1993 to 9% in 2001).

# Nonresident *Winter* Visitor Profile

## A Study of Winter Visitors to Montana

### Introduction

The purposes of this study were to assess characteristics of nonresident winter visitors to Montana, to determine travel patterns, and to update visitor estimation figures for the state of Montana. A winter visitor for this study is defined as a nonresident who traveled in Montana anytime during the four winter months of December 2000 and January, February, or March 2001.

This winter 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 studies conducted in 1997-1998.
- Determine the main attractions to the state, including Lewis and Clark attractions.
- Update information used in ITRR's model to estimate annual visitation and economic impacts.

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

- 1) All winter visitors (December through March) are analyzed as one group.
- 2) The primary purpose for visiting Montana is analyzed and compared to other purposes.
- 3) A comparison of winter visitors of 1997-1998 with 2000-2001 is made and analyzed.



## **Methodology**

### **Study Population**

Travelers to Montana during the winter of 2000-2001 (December 2000 – March 2001) 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 location and month of entry into the state. For modeling purposes, entry locations included highway border crossings and major airports. Major airports included flights leaving Billings, Bozeman, Butte, Great Falls, Helena, Kalispell, and Missoula. Thirty-nine roadway locations were considered entry points into the state (i.e., Interstates, primary and secondary highways, and minor roads).

The method used to estimate the nonresident travel populations 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 included:

- 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.
- Sky West Monthly deboarding counts for West Yellowstone

Second, surveyors identified resident/nonresident proportions at entry locations 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 December 10, 2000 and March 31, 2001, ITRR staff intercepted nonresident highway travel groups at gas stations and Canadian border crossings, and air travel groups at all airports while waiting for their flight to depart.

When contacted, preliminary data was collected from the travel groups, including entry location, 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. These "front-end" data were 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, 1,423 groups were contacted. Questionnaires were handed to 1,258 groups. Useable questionnaires were returned by 477 groups for a response rate of 38 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 would have been impossible to mail replacement questionnaires to non-respondents as is the norm in mail survey methodology.

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 winter 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 2000-01 winter visitor and the 1997-1998 winter visitor. **Throughout the report, numbers that appear in bold represent one or two of the highest percentages for that column.**

### ALL visitors

**Table 1: Trip Expenditures – Winter 2000-2001**

		<b>All Travelers</b>
<b>Total # of Winter Groups</b>		801,562
<b>Group Size</b>		2.4
<b># Of Nights in MT</b>		3.07
<b>Average Daily Expenditures</b>		\$110.94
<b>Total Winter Expenditures</b>		\$273,000,600
<b>Expenditure Distribution</b>	Restaurant/Bar	\$27.19
	Gas/oil	\$24.10
	Retail	\$21.07
	Hotel/motel	\$21.05
	Groceries/snacks	\$5.51
	Auto Rental/repair	\$4.69
	Misc. Services	\$2.71
	Transportation	\$1.75
	Entrance fees	\$1.49
	Outfitter/guide	\$1.31
	Camping	\$0.04

**Table 2: Percent of Overnight Stays by Region**

<b>Region</b>	<b>% Overnights spent in Region</b>
<b>Glacier Country</b>	23%
<b>Gold West Country</b>	8%
<b>Russell Country</b>	14%
<b>Yellowstone</b>	23%
<b>Custer Country</b>	<b>29%</b>
<b>Missouri Country</b>	3%

**Table 3: Percent of Overnight Stays for Selected Communities**

Region	City	% Of all overnights
Glacier Country (23%)	Missoula	11%
	Kalispell	9%
	Whitefish	7.5%
	Big Fork	2%
	Hamilton	<1%
	West/East Glacier	1%
	Glacier National Park	-
Gold West Country (8%)	Butte	5%
	Helena	4%
	Dillon	2.5%
	Virginia City	-
Russell Country (14%)	Great Falls	14%
	Shelby	3%
	Havre	8%
	Lewistown	1%
Yellowstone Country (23%)	Bozeman	16%
	West Yellowstone	4.5%
	Big Sky	7%
	Red Lodge	2.5%
	Yellowstone NP	1%
	Gardiner	4%
Custer Country (29%)	Billings	32.5%
	Hardin	1%
	Miles City	14%
	Glendive	6%
Missouri River Country (3%)	Sidney	2%
	Plentywood	<1%
	Glasgow	2%

**Table 4: Percent of Nonresidents on Specified Highway Segments**

Travelers		All Travelers	Travelers		All Travelers
West-East			North-South		
I-90	ID Border to Missoula	18-20%	I-15	Canada to Shelby	9%
	Missoula to Butte	23%		Shelby to Great Falls	8-10%
	Butte to Bozeman	23-27%		Great Falls to Helena	8%
	Bozeman to Billings	26-33%		Helena to Butte	6%
	Billings to WY Border	18-22%		Butte to ID Border	10-12%
1-94	Billings to Miles City	22-23%	US93	Canada to Kalispell	2-4%
	Miles City to Glendive	28%		Kalispell to Polson	3-4%
	Glendive to ND Border	17%		Polson to Missoula	5%
US2	ID Border to Kalispell	3%	US191	Missoula to ID Border	1%
	Kalispell to Shelby	5-6%		Bozeman to Big Sky	5-8%
	Shelby to Glasgow	6-7%	US59	Big Sky to W. Yellowstone	7%
	Glasgow to ND Border	6-7%		Miles City to Broadus	5%
			Broadus to WY border	6%	

## Trip Satisfaction and Changes Noted by *Winter* Visitors

**Table 5: Satisfaction with Montana Conditions**

Total responses ranged from 285-362	Mean*	% Satisfied	% Neutral	% Dissatisfied
Road Conditions	1.30	78%	14%	8%
Directional Signage	1.24	81%	15%	4%
Hospitality & Service	<b>1.11**</b>	89%	10%	1%
Commercial Lodging Availability	1.16	85%	15%	-
Availability of Highway Rest Areas	<b>1.71</b>	46%	37%	17%
Condition of Natural Environment	1.31	72%	25%	3%
Amount of Roadside Historical Information	1.53	53%	41%	6%
Availability of Travel Information	1.40	63%	35%	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**

Total responses ranged from 162-322	Mean*	% Better	% Same	% Worse
Road Conditions	1.66	46%	41%	12%
Directional Signage	1.70	30%	70%	-
Hospitality & Service	1.72	29%	70%	1%
Commercial Lodging Availability	<b>1.47**</b>	54%	46%	-
Availability of Highway Rest Areas	1.98	17%	69%	14%
Condition of Natural Environment	2.03	11%	75%	14%
Amount of Roadside Historical Information	1.84	16%	84%	-
Availability of Travel Information	1.74	27%	73%	-
Amount of Wildlife Viewing Opportunities	1.98	16%	71%	14%
Recreation Opportunities	1.68	34%	64%	2%
Amount of Open Space	<b>2.09**</b>	14%	64%	22%
Camping Availability	1.91	24%	62%	14%

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

\*\*bold items represent the highest and lowest score on these questions

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

**Table 7: Reasons for Visiting Montana**

	All Reasons	Primary Reason
Passing Through	32%	<b>29%</b>
Vacation	<b>39%</b>	23%
Business	24%	18%
Visit Family & Friends (VFR)	32%	16%
Other	6%	9%
Shopping	12%	6%

**Table 8: Demographic Comparison of All Winter Travel Groups and those Categorized by Primary Reason for visiting Montana**

Travelers		ALL TRAVELERS	Vacation (23%)	Visit family/ friends (32%)	Business (18%)	Passing Through (29%)
Travel Party Type	Couple	32%	44%	28%	15%	38%
	Self	29%	7%	44%	69%	23%
	Family	22%	14%	28%	3%	27%
	Family/Friends	7%	18%	-	-	8%
	Friends	6%	15%	-	-	5%
	Bus. Assoc.	3%	-	-	12%	-
	Org. Group	1%	1%	-	-	-
Lived in MT Before?	Yes	18%	16%	30%	6%	8%
Visited MT Before?	Yes	95%	88%	97%	90%	99%
Number of visits in past 10 years	1	9%	18%	4%	16%	4%
	2	7%	9%	14%	3%	6%
	3	4%	5%	2%	2%	5%
	4	2%	2%	6%	2%	1%
	5	10%	10%	8%	1%	13%
	6-10	21%	24%	14%	7%	27%
	11-20	11%	4%	19%	14%	13%
	21+	37%	29%	32%	54%	30%
Seasons Visited Before	Spring	60%	53%	76%	66%	58%
	Summer	74%	71%	79%	71%	78%
	Fall	68%	49%	71%	76%	70%
	Winter	74%	69%	86%	73%	76%
Traveling with Children	Yes	18%	16%	15%	3%	24%
Children's influence in planning	No Influence	50%	23%	36%	Sample size too small to analyze further	44%
	Some Influence	23%	43%	33%		23%
	Great Influence	28%	34%	31%		34%
Children's influence in activities	No influence	14%	9%	26%		17%
	Some Influence	50%	57%	30%		53%
	Great Influence	36%	35%	44%		30%
Travelers		ALL TRAVELERS	Vacation (23%)	Visit family/ friends (32%)	Business (18%)	Passing Through (29%)
Household Income	Less than \$20K	7%	7%	1%	-	12%
	\$20K-\$39,999	16%	7%	29%	12%	17%
	\$40K-\$59,999	20%	11%	21%	6%	32%
	\$60K-\$79,999	24%	19%	28%	42%	9%
	\$80K-\$99,999	16%	21%	7%	16%	26%
	\$100,000+	18%	35%	14%	24%	5%

**Table 9: Visitors Place of Residence**

Travelers	All Travelers	Vacation (23%)	Visit family/ friends (32%)	Business (18%)	Passing Through (29%)
Place of Residence	ND: 22%	ND: 34%	WA: 16%	ND: 37%	WY: 24%
	WY: 17%	WY: 9%	WY: 16%	WY: 11%	Alb.: 16%
	WA: 8%	MN: 8%	AZ: 13%	TX: 10%	ND: 11%
	Alb.: 7%	OH: 7%	CO: 9%	SD: 8%	WA: 9%
	CO: 6%	CA, Alb: 6%	ID, ND: 6%	WA: 7%	ID: 8%
	MN: 5%	CO,NY,WA: 3%	NM: 5%	CO: 5%	Sask: 6%
	ID, CA, SD, Sask: 3%		ALB, MN: 3%		CO: 5%
	AZ, BC, TX, OH: 2%				BC,MN: 4%

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

**Table 10: General Trip Behavior**

Travelers		All Travelers	Vacation (23%)	Visit Family/ Friends (32%)	Business (18%)	Passing Through (29%)
All Purposes of Trip	Vacation	39%	100%	33%	9%	18%
	VFR	32%	45%	100%	7%	6%
	Passing Thru	32%	5%	5%	<1%	100%
	Business	24%	3%	14%	100%	8%
	Shopping	12%	11%	7%	1%	8%
	Other	6%	2%	2%	1%	-
Plan to visit in next 2 yrs.	Yes	96%	89%	98%	97%	98%
Flew on portion of trip	Yes	22%	24%	23%	38%	12%
Rent Auto?	Yes	12%	21%	14%	24%	-
Where rented?	Montana	57%	44%	61%	62%	-
	Colorado	2%	-	10%	-	-
	Idaho	24%	30%	11%	31%	-
	Oregon	0	-	-	-	-
	Utah	0	-	-	-	-
	Washington	5%	6%	19%	-	-
	Wyoming	4%	-	-	7%	-
	Alberta	0	-	-	-	-
	British Col.	2%	-	-	-	-
Other	7%	20%	-	-	-	
Hired Outfitter	Yes	2%	4%	-	-	2%

**Table 11: Accommodations**

Travelers		All Travelers	Vacation (23%)	Visit Family/ Friends (32%)	Business (18%)	Passing Through (29%)
<b>Nights in MT on this trip</b>		3.1	3.6	4.9	3.6	1.0
<b>If Overnight in MT, Percent of Nights Spent in Accommodation Types</b>	Hotel/motel/B&B	<b>62%</b>	<b>72%</b>	23%	<b>79%</b>	<b>79%</b>
	Parking lot	1%	1%	1%	-	-
	Cabin/2 <sup>nd</sup> Home	1%	2%	-	-	-
	Public Campgr.	1%	-	-	1%	4%
	Private Campgr.	-	-	-	-	1%
	VFR Home	26%	15%	<b>71%</b>	5%	8%
	Rented Cabin	1%	-	1%	-	8%
	Resort/Condo	3%	5%	1%	1%	-
	Guest Ranch	-	-	-	-	-
	Other	5%	4%	3%	1%	-

**Table 12: Winter 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
<b>Open Space/ Uncrowded Areas</b>	<b>22%</b>	<b>23%</b>	<b>42%</b>	<b>24%</b>	16%	5%	There was an inadequate number of people here on <b>business</b> who also indicated that vacation was a reason for visiting Montana therefore the sample size is too small for this question.		There was an inadequate number of people <b>passing through</b> who also indicated that vacation was a reason for visiting Montana therefore the sample size is too small for this question.	
<b>Mountains/forests</b>	18%	12%	37%	5%	22%	19%				
<b>Rivers/lakes</b>	11%	1%	18%	2%	10%	-				
<b>Plains/Badlands</b>	4%	-	5%	-	1%	-				
<b>Native Am. Culture</b>	4%	-	4%	-	1%	-				
<b>Lewis &amp; Clark sites</b>	4%	-	6%	-	3%	-				
<b>Montana History</b>	5%	6%	7%	1%	5%	-				
<b>Family/friends</b>	11%	14%	14%	3%	31%	62%				
<b>Glacier Nat'l Park</b>	4%	-	9%	-	3%	1%				
<b>Yellowstone NP</b>	9%	7%	26%	10%	5%	1%				
<b>Wildlife</b>	8%	-	14%	-	8%	-				
<b>Camping</b>	4%	1%	6%	-	4%	-				
<b>Fishing</b>	6%	1%	8%	1%	5%	-				
<b>Hiking</b>	5%	0	8%	-	4%	-				
<b>Hunting</b>	2%	2%	4%	1%	2%	4%				
<b>Snowmobiling</b>	4%	3%	10%	5%	5%	-				
<b>Downhill skiing</b>	12%	16%	35%	28%	6%	4%				
<b>XC skiing</b>	3%	0	4%	-	1%	-				
<b>Other Activity</b>	4%	6%	4%	3%	3%	1%				
<b>Special Event</b>	5%	9%	17%	16%	2%	4%				



**Table 13: Sites Visited While in Montana on this Trip**

	All Travelers	Vacation	Visit Friends/Relatives	Business	Passing Through
Glacier National Park	9%	11%	6%	24%	1%
Yellowstone National Park	13%	31%	14%	12%	2%
Little Bighorn Battlefield	6%	5%	20%	4%	-
Fort Peck Lake	4%	-	1%	18%	-
National Bison Range	2%	3%	3%	2%	-
Flathead Lake Area	11%	23%	4%	12%	3%
Clark Canyon Reservoir	1%	>1%	-	-	1%
Gates of the Mountains	1%	3%	2%	-	-
Lost Trail Pass	1%	1%	-	-	3%
Bighorn Canyon Nat'l Rec. Area	2%	-	4%	6%	-
Museum of the Rockies	1%	>1%	6%	-	-
Lewis & Clark Interpretive Center	5%	5%	1%	18%	1%
Montana Historical Society	>1%	-	2%	-	-
Pompey's Pillar	2%	3%	5%	-	3%
Missouri Headwaters	2%	5%	1%	1%	-
Lemhi Pass	>1%	-	-	-	2%
CM Russell Nat'l Wildlife Refuge	1%	>1%	4%	-	-
Lolo Pass Interpretive Center	1%	3	-	1%	1%

**Table 14: Sources of Information Used to Plan Trip**

	All Travelers		Vacation		VFR		Business		Passing Through	
	All items	Most Useful	All items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Internet	23%	35%	35%	48%	30%	62%	23%	11%	12%	25%
Auto Club	7%	13%	5%	3%	4%	3%	1%	1%	16%	35%
Travel Agency	5%	6%	3%	2%	8%	15%	12%	13%	-	-
Chamber/CVB	2%	5%	3%	1%	1%	1%	2%	-	2%	17%
MT Travel Planner	2%	2%	2%	6%	2%	5%	-	-	-	-
Nat'l Park	2%	1%	8%	-	2%	1%	-	-	-	-
1-800 state #	<1%	0	2%	-	1%	-	-	-	-	-
Guide Book	3%	2%	4%	5%	4%	4%	<1%	-	4%	-
Private Business	15%	36%	17%	33%	18%	10%	39%	74%	5%	23%
None used	62%		56%		55%		43%		71%	

**Table 15: Sources of Information Used While in Montana**

	All Travelers		Vacation		VFR		Business		Passing Through	
	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Info center person	8%	4%	6%	7%	6%	6%	11%	2%	7%	4%
Billboards	10%	6%	8%	2%	4%	1%	20%	7%	11%	13%
Highway Signs	26%	20%	12%	10%	29%	31%	21%	26%	34%	27%
Brochure Rack	16%	12%	15%	12%	22%	7%	20%	23%	8%	13%
Service Person	29%	30%	31%	27%	32%	35%	26%	26%	20%	20%
None of these	53%		61%		43%		60%		50%	

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

	All Travelers		Vacation		VFR		Business		Passing Through	
	All	Primary	All	Primary	All	Primary	All	Primary	All	Primary
<b>Picnicking</b>	6%	4%	10%	1%	3%	1%	-	-	<b>13%</b>	<b>16%</b>
<b>Camping (devlp.)</b>	5%	4%	3%	1%	<1%	<1%	18%	14%	2%	5%
<b>Camping (undeveloped)</b>	2%	6%	4%	-	1%	-	-	1%	1%	2%
<b>Day Hiking</b>	12%	5%	<b>20%</b>	10%	15%	8%	20%	2%	5%	2%
<b>Golfing</b>	2%	1%	7%	2%	<1%	-	<1%	1%	1%	1%
<b>Backpacking</b>										
<b>Backpacking</b>	2%	1%	1%	-	3%	1%	-	-	2%	2%
<b>Mountain Biking</b>										
<b>Mountain Biking</b>	1%	-	1%	-	-	-	-	-	2%	-
<b>Road/tour Biking</b>										
<b>Road/tour Biking</b>	<1%	-	-	-	-	-	1%	1%	-	-
<b>Off Highway/ATV</b>										
<b>Off Highway/ATV</b>	3%	2%	-	-	13%	8%	-	-	-	-
<b>Fishing</b>										
<b>Fishing</b>	5%	3%	4%	2%	3%	2%	18%	14%	-	-
<b>Motor boating</b>										
<b>Motor boating</b>	-	-	-	-	-	-	-	-	-	-
<b>Water-skiing</b>										
<b>Water-skiing</b>	-	-	-	-	-	-	-	-	-	-
<b>Canoe/Kayaking</b>										
<b>Canoe/Kayaking</b>	-	-	-	-	-	-	-	-	-	-
<b>Sail/Windsurf</b>										
<b>Sail/Windsurf</b>	-	-	-	-	-	-	-	-	-	-
<b>Rafting/Floating</b>										
<b>Rafting/Floating</b>	-	-	-	-	-	-	-	-	-	-
<b>Nature Study</b>										
<b>Nature Study</b>	6%	1%	2%	-	5%	1%	-	-	5%	6%
<b>Hunting</b>										
<b>Hunting</b>	<1%	-	<1%	-	2%	1%	-	-	-	-
<b>Wildlife watching</b>										
<b>Wildlife watching</b>	17%	9%	17%	7%	<b>28%</b>	<b>14%</b>	4%	3%	12%	11%
<b>Sporting Event</b>										
<b>Sporting Event</b>	7%	3%	5%	2%	4%	2%	-	-	2%	3%
<b>Gambling</b>										
<b>Gambling</b>	<b>12%</b>	5%	6%	3%	8%	4%	<b>26%</b>	<b>6%</b>	<b>15%</b>	11%
<b>Shopping</b>										
<b>Shopping</b>	<b>41%</b>	<b>23%</b>	<b>41%</b>	<b>16%</b>	<b>52%</b>	<b>23%</b>	<b>41%</b>	<b>31%</b>	<b>26%</b>	<b>29%</b>
<b>Snowmobiling</b>										
<b>Snowmobiling</b>	6%	3%	9%	4%	5%	3%	9%	7%	-	-
<b>Downhill Skiing</b>										
<b>Downhill Skiing</b>	<b>12%</b>	<b>8%</b>	<b>31%</b>	<b>16%</b>	6%	3%	15%	10%	4%	2%
<b>Snowboarding</b>										
<b>Snowboarding</b>	3%	2%	12%	6%	3%	2%	-	-	-	-
<b>XC Skiing</b>										
<b>XC Skiing</b>	3%	1%	7%	3%	2%	1%	2%	2%	2%	-
<b>Snowshoeing</b>										
<b>Snowshoeing</b>	3%	2%	11%	4%	2%	1%	-	-	-	-
<b>Ice Fishing</b>										
<b>Ice Fishing</b>	1%	-	-	-	-	<1%	-	-	-	-
<b>Visited Sites:</b>										
<b>Native American</b>										
<b>Native American</b>	6%	1%	5%	1%	5%	2%	3%	2%	-	-
<b>Lewis &amp; Clark</b>										
<b>Lewis &amp; Clark</b>	8%	1%	9%	2%	6%	3%	1%	-	9%	1%
<b>Other History</b>										
<b>Other History</b>	8%	5%	9%	2%	<b>20%</b>	11%	5%	3%	1%	4%
<b>Museums</b>										
<b>Museums</b>	8%	3%	8%	2%	11%	6%	2%	1%	5%	3%
<b>Festivals/Events</b>										
<b>Festivals/Events</b>	9%	4%	17%	8%	5%	2%	-	-	2%	2%

**Table 17: Comments by All Visitors**

	N
Montana has nice scenery	26
Montana has nice people	13
Would like to return	10
Would like to move to Montana	4
General positive comments, i.e.	24
Have been here before	18
Lived or grew up in Montana	3
Information	2
Rest areas	5
Openness/uncrowdedness of Montana; undeveloped nature of Montana	14
Highways/road conditions	27
Speed limit	1
Own property in Montana	0
Prices	1
Sales tax	12
Public access	0
Shopping	3
Comments about specific sites	16
Specific suggestions:	19
Miscellaneous	21

**Comparison Data: Winter 1998 / Winter 2001**

**Table 18: Expenditure Comparison Between 1998 and 2001 Winter Visitors**

		All Travelers 1998	All Travelers 2001
<b>Total # of Winter Groups</b>		611,000	801,562
<b>Group Size</b>		2.3	2.4
<b># of Nights in MT</b>		3	3.07
<b>Average Daily Expenditures</b>		\$96.00	\$110.94
<b>Total Winter Expenditures</b>		\$240,000,000	\$336,702,000
<b>Expenditure Distribution</b>	Restaurant/Bar	\$22.00	\$27.19
	Gas/oil	\$20.00	\$24.10
	Retail	\$19.00	\$21.07
	Hotel/Motel	\$19.00	\$21.05
	Groceries/Snacks	\$5.00	\$5.51
	Auto Rental/Repair	\$3.00	\$4.69
	Transportation		\$1.75
	Misc. Services		\$2.71
	Entrance fees	\$9	\$1.49
	Outfitter/Guide		\$1.31
	Camping		\$0.04

**Table 19: Travel Characteristics: 1998 vs 2001**

Travelers		All Travelers 1998	All Travelers 2001
Travel Party Type	Couple	29%	<b>32%</b>
	Self	34%	29%
	Family	21%	22%
	Family/Friends	5%	7%
	Friends	8%	6%
	Bus. Assoc.	3%	3%
	Org. Group	<1%	1%
Lived in MT Before?	Yes	24%	18%
Visited MT Before?	Yes	98%	95%
Seasons Visited Before	Spring	63%	60%
	Summer	<b>80%</b>	<b>74%</b>
	Fall	66%	68%
	Winter	<b>86%</b>	<b>74%</b>
Place of Residence		WA: 15%	ND: 22%
		ND: 14%	WY: 17%
		WY, Alb: 9%	WA: 8%
		MN: 6%	Alb.: 7%
		CO,CA,BC,Sask: 3%	CO: 6%
		SD, AZ,TX,OH: 2%	MN: 5%
			ID, CA, SD, Sask: 3%
		AZ, BC, TX, OH: 2%	
All Purposes of Trip	Vacation	<b>43%</b>	<b>39%</b>
	VFR	36%	32%
	Passing Thru	32%	32%
	Business	27%	24%
	Shopping	13%	12%
	Other	7%	6%
Flew portion of trip	Yes	21%	22%
Rent Auto?	Yes	9%	12%

**Table 20: Winter Attractions To Montana: 1998 vs 2001**

	All Travelers 1998		All Travelers 2001	
	All	Primary	All	Primary
Open Space/Uncrowded Areas	51%	14%	22%	23%
Mountains/fore sts	61%	8%	18%	12%
Rivers/lakes	27%	2%	11%	1%
Plains/Badlands	6%	-	4%	-
Native Am. Culture	5%	1%	4%	-
Lewis & Clark sites	NA*		4%	-
Montana History	9%	2%	5%	6%
Family/friends	36%	20%	11%	14%
Glacier Nat'l Park	14%	<1%	4%	-
Yellowstone NP	25%	6%	9%	7%
Wildlife	30%	1%	8%	-
Camping	NA*		4%	1%
Fishing	NA*		6%	1%
Hiking	NA*		5%	0
Hunting	8%	2%	2%	2%
Snowmobiling	31%	20%	4%	3%
Downhill skiing	33%	22%	12%	16%
XC skiing	NA*		3%	0
Other Activity	NA*		4%	6%
Special Event	NA*		5%	9%

\*NA = not asked in 1997-98

**Table 21: Sources of Information used to gather information for the Trip: 1998 vs 2001**

	All Travelers 1998		All Travelers 2001	
	All items	Most Useful	All items	Most Useful
Internet	9%	9%	23%	35%
Auto Club	14%	23%	7%	13%
Travel Agency	7%	10%	5%	6%
Chamber/CVB	4%	4%	2%	5%
MT Travel Planner	3%	2%	2%	2%
Nat'l Park	4%	2%	2%	1%
1-800 state #	3%	2%	>1%	0
Guide Book	6%	6%	3%	2%
Private Business	10%	14%	15%	36%
None used	51%		62%	

**Table 22: Activities Participated in While in Montana: 1998 vs 2001**

	<b>All Travelers 1998</b>	<b>All Travelers 2001</b>
<b>Day Hiking</b>	11%	<b>12%</b>
<b>Fishing</b>	6%	5%
<b>Wildlife watching</b>	<b>24%</b>	<b>17%</b>
<b>Sporting Event</b>	8%	7%
<b>Gambling</b>	<b>17%</b>	<b>12%</b>
<b>Shopping</b>	<b>46%</b>	<b>41%</b>
<b>Snowmobiling</b>	<b>19%</b>	6%
<b>Downhill Skiing</b>	<b>20%</b>	<b>12%</b>
<b>Snowboarding</b>	6%	3%
<b>XC Skiing</b>	5%	3%
<b>Native American</b>	6%	6%
<b>Lewis &amp; Clark</b>		8%
<b>Other History</b>	11%	8%
<b>Museums</b>	12%	8%
<b>Festivals/Events</b>	8%	9%

## Summary, Discussion & Recommendations

### Summary and Discussion

The results of the winter nonresident study bring out a number of interesting marketing opportunities, policy challenges, and questions that may not be answerable. This section includes a discussion of what the results mean, a look at trends, and recommendations for marketing, policy, and further research.

#### **Winter Expenditures**

(Table 17; p. 12)

Average daily expenditures of winter nonresident visitors to Montana have increased nearly 16 percent since 1997-1998. While spending patterns have remained the same, each category shows an increase in expenditures. Most of the increase is due to inflation, but some can be attributed to overall price increases. The largest percent increase in a category is seen in restaurant/bar expenditures where the amount spent went from \$22.00 to \$27.19, a 23 percent increase.

#### **Travel Patterns**

(Tables 2-4, & 9; pp.4, 5, & 8)

The majority of winter travelers in Montana stayed on the Interstates. Between 18 and 28 percent of all nonresidents travel the east-west corridors of Interstate 90 and Interstate 94. The most heavily traveled section of Interstate 90 was between Bozeman and Billings where 33 percent of all nonresidents traveled a portion of that section. The most heavily traveled section on I94 is between Miles City and Glendive with 28 percent of all nonresidents. US2 is much less traveled with only about 6 percent of all visitors traveling any part of that highway in the winter months. The north-south routes carried only slightly more 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. US191 from Bozeman to Big Sky had the next highest percent of north-south traffic with 8 percent of nonresidents traveling that route.

Custer Country Travel Region received the largest percent of overnight stays of all the travel regions in the state. Glacier and Yellowstone Travel Region Countries received 23 percent of overnight stays each. Following that pattern, when looking at the communities, more people spend a night in Billings than any other city (32%), followed by 16 percent staying in Bozeman and 11 percent staying in Missoula. Great Falls and Miles City each received 14 percent of all overnight stays when looking at the community level. These overnight patterns are in line with the winter travel routes.

To further explain the overnight and travel route patterns, one only needs to look at the residences of the visitors. Fifty percent of all nonresident visitors to Montana reside in either North Dakota, Wyoming, Minnesota, or Colorado (Table 9). These are nearby states to the south or east of Montana where people are likely to travel from the east or south into Billings. Other nearby states or provinces only make up 23 percent of all visitation to the state and those states/provinces are west or north of Montana.

## **Satisfaction and Changes Observed**

(Tables 5 & 6; p. 6)

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 and "3" was dissatisfied. Nonresidents were satisfied with their experiences in Montana since all eight categories received a rating less than "2". Hospitality/service received the highest satisfaction ratings with 89 percent of all visitors being satisfied with Montana's hospitality and service (mean satisfaction level of 1.11). On the other hand, only 46 percent of visitors indicated satisfaction with the availability of highway rest areas. This feature received the highest dissatisfaction ratings with 17 percent being dissatisfied. However, the mean satisfaction level of 1.71 still shows overall satisfaction with rest areas.

Visitors who have been to Montana in the past were asked to indicate whether certain aspects of Montana have changed over time. Since 95 percent of all visitors had been to the state in the past, the comparisons included nearly the entire sample of winter visitors. The change scale ranged from 1 to 3 with "1" indicating that things were better and "3" meaning things were worse. A score closer to "1" indicated an improvement, while a score closer to "3" indicated a worsening condition.

Only two aspects over time appear to be worsening from the point of view of visitors who have been here in the past. First, "amount of open space" received a mean of 2.09 with 22 percent of the visitors saying it had decreased and only 14 percent indicating it had increased. The second variable, "condition of the natural environment" had a mean of 2.03 with 14 percent of the visitors saying it had worsened over time and only 11 percent indicating that it had improved over time. The availability of commercial lodging received the highest number of "better" ratings (54%). 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.

## **Travel Behavior**

(Tables 7-16; pp. 6-11)

Winter visitors to Montana have a variety of reasons for coming to the state, but the most predominant reasons when allowed to indicate all reasons were vacation (39%), passing through (32%) and visiting friends and relatives (VFR) (32%). When asked to indicate the primary reason, however, it seems that "passing through" (29%) and "vacation" (23%) stay on the top while VFR falls to only 16 percent of the visitors. In other words, VFR may be a primary reason for 16 percent of the visitors but the other 16 percent said that while visiting their friends and relatives was a reason, it was not a primary reason.

Winter visitors are repeat visitors. As many as 95 percent of all winter visitors have been to Montana in the past. Even more interesting is that 37 percent of these people have been to Montana over 20 times in the past ten years, which equates to a minimum of two visits a year. Couples made up 32 percent of all winter travel groups, while 29 percent traveled alone. Only 18 percent traveled with children under 18 years of age. The most likely income range of visitors was \$60,000-\$80,000. However, when looking at visitors who were here primarily for vacation, their income was most likely over \$100,000 per year.

In the winter, nearly one-quarter of visitors (22%) flew to Montana. The percent of visitors who fly is always higher in winter than in the summer months because the summer travel volume is so much greater than the winter volume of visitors. When winter visitors flew, 12 percent rented a vehicle. Cars were usually rented in Montana (57%) but another 24 percent rent in Idaho and drove to Montana.

Not surprisingly, the two main types of overnight accommodations were motels and staying with friends or relatives. Sixty-two percent of all winter visitors spent at least one night in a motel while 26 percent spent at least one night at a home of someone they knew. However, those numbers reverse when the primary reason for the trip was visiting friends/relatives (VFR). Seventy-one percent spent a night in a private home when VFR was the reason for the trip.



Winter visitors in 2000-2001 were not as active as winter visitors in the past. They were less likely to visit sites and less likely to engage in activities. Yellowstone National Park continued to be a draw for nonresidents. Even though only seven percent said that Yellowstone was their primary attraction to Montana, 13 percent of all visitors (104,000 travel groups) indicated they visited Yellowstone and half of those were people here primarily for vacation. Vacationers were also more likely to visit the Flathead Lake area (23%).

When comparing visitors from 1998 (Table 22), it seems the types of activities participated in have more or less remained the same, but the number of participants has dropped. The winter of 2001 was not the best snow year in Montana and it is evident in the skiing and snowmobile statistics. In '97-'98, 20 percent of visitors went downhill skiing and 19 percent participated in snowmobiling. In 2000-'01, only 12 percent skied and 6 percent went snowmobiling. One activity which tends to remain fairly stable over the years is shopping. Forty-one percent of all visitors shopped in 2000-'01 while 46 percent shopped four years ago.

In the past, visitors who indicated they were here as part of a vacation were attracted to Montana's open space/uncrowded areas, the mountains, their friends and relatives who live here, wildlife, skiing and snowmobiling. Current visitors were similar but differed in that snowmobiling and wildlife were much less of a draw for them. It is interesting to note that the primary attraction for vacationers was skiing and the open space/uncrowded areas. It is likely that the dislike for the crowded slopes of Colorado, Utah, and California has finally made Montana more appealing. Those who are here to ski are here to ski in less crowded areas. They appear to be finding what they seek in Montana.

For trip planning, the primary purpose of the trip dictated what sources of information were the most useful. Vacationers depended on the Internet and private businesses to be their planning guides (48% and 33% respectively). Those visiting friends and relatives used the Internet the most (62%) while business travelers depended on private businesses the most (74%). Visitors passing through Montana depended on an automobile club, like AAA (35%), and the Internet (25%) for their trip planning. It is obvious that the Internet has become an integral part of the trip planning process.

While in Montana, over half (53%) did not use additional information sources. The other half of the visitors relied on service people (those who visited gas stations, restaurants, and front desks at motels) or highway information signs as their information source once they arrived.

## **Trends**

Analyzing trends is one way to look at the winter nonresident traveler to identify changes or stability. We either see a prevailing tendency in our data or a veering-off in a new direction. Travel behavior is easy to analyze over time when the same questions are asked repeatedly using the same methodology. For this analysis, a number of questions were repeated verbatim over time. The following table (Table 23) highlights some of the travel characteristics asked in 1993, 1998, and 2001 in ITRR's nonresident surveys. Some data only applies to 2 of the years while other data can be compared across all three years.

Most of these trends show stability. Group size and number of nights in Montana have remained largely unchanged for 8 years. Average daily expenditures dipped a little in 1998 but bounced back with a slight upward trend in 2001. The proportion of vacationers and visitors passing through has remained virtually the same. The primary reason for visiting Montana has changed slightly. The percent of visitors primarily here for VFR has shown a gradual decrease each survey period by two percent from 20 percent in 1993 to 18 percent in 1998 to 16 percent in 2001.

**Table 23: Winter Travel Group Comparison between 1993, 1998, 2001**

		1993		1998		2001	
Total # of Winter Groups		800,000		611,000		801,562	
Group Size		2.3		2.3		2.4	
Total # of Individuals		1,840,000		1,405,300		1,923,700	
# of nights in Montana		3.1		3.0		3.1	
Average Daily Expenditure		\$101		\$96		\$111	
Purpose of Trip		All	Primary	All	Primary	All	Primary
	Vacation	42%	24%	43%	20%	39%	23%
	VFR	30%	20%	36%	18%	32%	16%
	Pass Thru	30%	26%	32%	32%	32%	29%
	Business	26%	22%	27%	22%	24%	18%
	Shopping	15%	6%	13%	2%	12%	6%
Number of Visitor Groups by Place of Residence	WA	152,000		91,600		64,100	
	ND	48,000		85,500		176,300	
	WY	32,000		55,000		136,300	
	Alberta	136,000		55,000		56,100	
	ID	64,000		67,200		24,000	
	MN	56,000		36,700		40,000	
Activities	Visit Yellowstone NP	13%		n/a		13%	
	Visit Glacier NP	2%		n/a		9%	
	Visit Museums	4%		12%		8%	
	Special Event/Festivals	4%		8%		9%	
	Watch Wildlife	24%		24%		17%	
	Gambling	16%		17%		12%	
	Snowmobiling	13%		19%		6%	
	Downhill Skiing	13%		20%		12%	
	XC Skiing	4%		5%		3%	
	Day Hiking	3%		11%		12%	

An interesting winter trend noted here is the origin of those who are coming to visit Montana. Nearly 10 years ago Washington residents made up 19 percent of all winter visitors. By 2001, Washington residents represented only 8 percent of all winter visitors - a drop of nearly 90,000 groups. On the other hand, North Dakota and Wyoming residents made up only 10 percent of all visitors in 1993 and now account for 39 percent of visitors. The number of visitors from Alberta and Idaho has dropped significantly since 1993 and Minnesota visitor groups have dropped off slightly. This is a difficult trend to understand. It appears that more winter visitors are coming from the east and south and fewer are arriving from the north and west. It makes sense with the Canadian exchange rate that our northern neighbors are staying away. It is unclear why Washington residents dropped so significantly in the ranking since 1993. Assuredly, some of it is weather related. However, it seems safe to say that the marketing campaigns heavily targeting North Dakotans and Minnesotans to visit Montana in the winter have been working.

Other noteworthy trends include changes in activity participation patterns while in the state. While the survey instrument in the three different years asked this question a bit differently each time, it is still possible to extract some of the same variables. In general, most activity participation patterns have changed only slightly and do not appear to be alarming. There are a couple noteworthy exceptions, however, of which the most significant change is in the number of people snowmobiling. Participation started out in 1993 with 13 percent, followed by 1998 with 19 percent, then dropped drastically to 6 percent in 2001. Downhill skiing also dropped down from a high in 1998 of 20 percent to a low of 12 percent in 2001. These declines may be explained by snow conditions as 2001 was a poor snow year, but the aging of the baby boomers may also explain some of the changes. As people age they become more sedentary and as much as the baby boomers will try to argue the point, this is occurring in American society. Until the boom of the younger generation takes over, it is likely that participation in

active types of activities will continue to decline. A reversal in this trend will likely not occur for about 10 years.

## **Recommendations**

The question remains - what does one do with all this information? Nonresident travel research should provide information to policy makers. It should provide suggestions or ideas toward new or similar marketing strategies. And it should provide recommendations on where additional research is needed. However, 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. Therefore, this section will first address potential policy issues followed by marketing ideas and ending with future research.

### **Policy**

It is important to look at what is going right in terms of nonresident travel from a policy viewpoint. First of all, nonresidents give high marks in the improvement of the availability of commercial lodging, road conditions, and recreation opportunities. Fifty-four percent of all visitors indicated that the availability of commercial lodging has improved over the years. Road conditions have improved according to 46 percent of visitors, and opportunities for recreation have improved according to 34 percent of visitors. In addition, visitors are satisfied with the hospitality and service they receive while in Montana.

The above statements suggest that the business climate for accommodations has been stimulating. When lodging is available, people can visit. The Department of Transportation (DOT) should be commended on its work on improving road conditions. Nonresidents feel road conditions have improved over the years. This may be partly due to a low snow year which meant driving was much easier on visitors, but it probably relates to how roads were plowed, fixed, and maintained. Apparently improvements have been noticed. About one-third of the visitors also indicated that recreation opportunities have improved. While it is uncertain what is exactly meant by this statement, it is clear that skiing, hiking, and special events/festivals have contributed to these opportunities. Policy makers would be wise to examine any policies that could change or negatively impact these opportunities for both visitors and residents alike. Finally, while it is not a policy stemming from legislative action, the hospitality training which is funded through Travel Montana, should be continued. More visitors were satisfied with Montana's hospitality than any other variable. In addition, the service person is used more than any other source for information while in Montana. It is wise to invest in Montana's front-line employees. Montana needs to continue its open arms policy to keep the visitors coming back.

One trend that emerged from the research is the high number of visitors who were attracted to Montana for our open space and uncrowded areas. Visitors indicated open space/uncrowded areas as an attraction to the state more than any other attraction. What is somewhat alarming, however, is that "amount of open space" was believed to have declined over the years by 22 percent of the visitors. In addition, 14 percent of visitors felt that the condition of the natural environment had declined. Montana could lose visitors based on a deteriorating state infrastructure in terms of open space and the natural environment. From a policy standpoint, this finding is intriguing. Both visitors and residents like open space. Are there regulations or laws that can be designed to keep our landscape in tact? Since many acres in Montana are federally owned, this may be considered a federal issue. However, as seen in the community of Missoula, setting aside lands adjacent to and within the community for open space are important aspects to the quality of life within that community. Both local and state officials need to be aware of the importance of open space and do what is necessary to encourage its preservation.

Winter visitor spending on shopping, eating, and drinking contributes over \$146 million dollars directly to the establishments providing the product/service. The age-old question of a sales tax always begins here. Should Montana ask visitors to contribute to the tax structure of our state? Even a four percent sales tax could generate nearly \$6 million just in the winter from people who do not even live in the state.

What is more intriguing is that winter expenditures are about 10 percent of the total amount spent in Montana over a year. This means that an additional \$60 million could be generated in the course of a year by instituting a 4 percent sales tax. However, a sales tax has its drawbacks as well. Most recently it has been evident that NOT depending on nonresidents for tax dollars has provided stability to our state when other states, affected by the terrorist attacks in New York and Washington, D.C., have cut services because travel to that state dropped so noticeably. Granted, part of their economic woes stems from a down-turn in the economy, but some is directly related to fewer dollars generated through sales tax collections from visitors. In any event, a new tax structure could ask nonresidents to contribute to the economy of Montana. Currently, their contribution is hidden and quite low.

While we earlier commended the DOT on road conditions, we now have to change our cheery outlook toward the agency. Nonresident visitors indicated that the availability of highway rest areas was not good. More visitors gave rest areas a dissatisfied mark (17%) than any other travel condition they rated. In addition, 14 percent of visitors said the availability of rest areas has worsened over time. Each time nonresident surveys are conducted by ITRR, the prevailing theme is our lack of rest areas. If there is any policy that could contribute to greater satisfaction for visitors and residents, it would be to improve the current rest areas, add rest areas around the state, and combine rest areas with information centers close to the state borders.

Finally, the issue of snowmobiling cannot be ignored. While we may have explained why snowmobiling has decreased over the years (weather and aging), it is not clear whether the reduction in areas for snowmobiling has caused the drop in visitors who snowmobile. On the other hand, it is important to note that even though snowmobile visitation has dropped, overall visitation has not dropped. Policy makers need to look at all the consequences of banning snowmobiling, both good and bad.

## **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. Continued marketing programs will not be addressed.

First of all, there has been a change in visitor travel patterns coming from the west and north to more coming from the east and south. The questions to ask are: What are the long-term effects of this type of change? Is this change a good change? North Dakota and Wyoming currently provide the highest percent of nonresident winter visitors to Montana. Washington and Alberta used to hold this spot. From a practical standpoint, Washington and Alberta both have a much higher population base than North Dakota and Wyoming and could contribute more people to the visitor base. Marketing to Washington and Alberta, then, might encourage more people to visit, but they may not visit as many times. How many times can one expect North Dakota and Wyoming residents to return? Can we keep basing our marketing on the return visitor? The initial reaction is, "yes." As much as 95 percent of winter visitors have been here before and seem to visit frequently. We have no reason to believe this pattern will change. From a different point of view, however, we seem to have lost ground with the Washington visitor and this could be detrimental. Washington is a good market for Montana. It is nearby and access is easy both by highway and air. There are many Washington residents who have already visited Montana and return visitation could be expected in the winter. It is recommended that marketing efforts strive to bring more people from Washington for the winter.

Another interesting marketing idea focuses on the repeat visitor rather than the first time visitor. When 95 percent of all winter visitors have been to Montana in the past and 69 percent of those visitors have been to Montana six times or more in the past 10 years, we are talking about a serious connection to this state. They must really love Montana to come here that often! Marketing efforts need to build on that love for the state. In other words, it seems wise to go after the person who has experienced Montana in the past rather than just go after first time visitor for the winter market. Ways to encourage repeat visitation may come more from the private sector than the public sector. Accommodations could provide a "free" or reduced room if the summer visitor were to show up in the winter months. Attractions, such as ski areas, could start a program for nonresidents based on the frequent flyer

concept - come ski with us so many times and get free lift tickets. There are numerous ways to encourage repeat visitation. These are only a few ideas. Marketers could have fun creating new and challenging campaigns.

Winter visitors are definitely attracted to open space and uncrowded areas. Marketing campaigns should start (or continue) advocating those amenities to our potential visitor. It is a draw and should be used.

Travel Montana has been a leader in Internet information 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 almost all visitors. Twenty-three percent of all visitors used the Internet for planning, but when analyzed by purpose of trip, it is evident that vacationers and those visiting family and friends use it a lot (30-35%). These are the two markets that can be swayed to stay and play longer in the state, hence producing a greater economic impact. The Internet is a tool that will stay with consumers until some other "not-yet-discovered" tool appears on the horizon. Until then, it is necessary for web pages to be updated, easy to use, and attractive. Consumers do go to the Internet for planning. With that said, however, it is important to maintain an off-line presence for those potential visitors who do NOT go online.

Montana needs to keep claiming Yellowstone National Park as their own. Visitors come to Montana to experience the splendor of Yellowstone in the winter. It would be foolish to ignore this important draw. Yellowstone was the first national park ever created in the world and has natural wonders not seen in other places on the globe. Yellowstone is, and will always be, a major attraction to Montana.

Finally, there is a noticeable increase in the number of visitors who come to Montana for a festival or special event. These types of attractions create an opportunity and reason for people to visit in the winter. While marketing entities are not necessarily in control of special events, marketers at the CVB, regional, and state levels should aggressively market any winter events which are already occurring. In addition, assisting with the development of more festivals/events should be on their planning horizons.

### **Future research**

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

First, 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?

Second, the snowmobiling market and policies related to snowmobiling should be analyzed in greater detail. This niche study should include both residents and nonresidents since the impact of changes in snowmobiling policy is felt by all users. It is important to analyze who the participants are, what experience they desire, and what constitute acceptable policy changes in the minds of snowmobilers.

Third, it is recommended that a qualitative study of people who have visited Montana on vacation be conducted. The quantitative nonresident studies conducted to date provide excellent trend data and a good sketch of the visitor. What is unknown is the experience of a visitor. More depth into their motivations for being in Montana, their expectations, and their actual experience would be helpful to fully understand the Montana travel experience. An in-depth understanding of the experience could provide valuable marketing ideas.

Finally, it is recommended that a more in-depth study be conducted on visitors' trip planning process. While it is evident through this data that the Internet is a valuable tool for trip planning, it is not known how the Internet is really used. Is it simply a planning aid or are reservations made on the Internet? How did they locate the information accessed? Did the information on the Internet direct what the visitor

did in Montana or were all those activities chosen before the Internet was browsed? How have their trip planning activities changed over time? These are just some of the questions that need to be explored. It is recommended, again, that a qualitative study be conducted to answer these questions.

## **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)
- 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-countryside
  - 7. Montana's history
  - 8. Entertainment/Amusement Park
  - 9. Special events
  - 10. Northern Great Plains/Bookings
  - 11. Montana's culture
  - 12. Cross-country skiing
  - 13. Other
  - 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. Utah
  - 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

SAMPLE

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. Automobile club (e.g. AAA)
  - 3. Chamber of Commerce
  - 4. Airline Travel Planner
  - 5. National Geographic Magazine
  - 6. In-store computer monitor
  - 7. Travel Agent/Travel Advisor
  - 8. Travel Agent/Travel Advisor
  - 9. Travel Agent/Travel Advisor
  - 10. Travel Agent/Travel Advisor
  - 11. Travel Agent/Travel Advisor
  - 12. Travel Agent/Travel Advisor
  - 13. Travel Agent/Travel Advisor
  - 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/Travel Advisor
  - 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 America. (Please do not tick a box if not applicable.)

<input type="checkbox"/> None	<input type="checkbox"/> 1-2	<input type="checkbox"/> 3-4	<input type="checkbox"/> 5-6	<input type="checkbox"/> 7-8	<input type="checkbox"/> 9-10	<input type="checkbox"/> 11-12	<input type="checkbox"/> 13-14	<input type="checkbox"/> 15-16	<input type="checkbox"/> 17-18	<input type="checkbox"/> 19-20	<input type="checkbox"/> 21-22
<input type="checkbox"/> 1. Learning/developed an	<input type="checkbox"/> 2. Learning/developed an	<input type="checkbox"/> 3. Learning/developed an	<input type="checkbox"/> 4. Learning/developed an	<input type="checkbox"/> 5. Learning/developed an	<input type="checkbox"/> 6. Learning/developed an	<input type="checkbox"/> 7. Learning/developed an	<input type="checkbox"/> 8. Learning/developed an	<input type="checkbox"/> 9. Learning/developed an	<input type="checkbox"/> 10. Learning/developed an	<input type="checkbox"/> 11. Learning/developed an	<input type="checkbox"/> 12. Learning/developed an
<input type="checkbox"/> 13. Learning/developed an	<input type="checkbox"/> 14. Learning/developed an	<input type="checkbox"/> 15. Learning/developed an	<input type="checkbox"/> 16. Learning/developed an	<input type="checkbox"/> 17. Learning/developed an	<input type="checkbox"/> 18. Learning/developed an	<input type="checkbox"/> 19. Learning/developed an	<input type="checkbox"/> 20. Learning/developed an	<input type="checkbox"/> 21. Learning/developed an	<input type="checkbox"/> 22. Learning/developed an	<input type="checkbox"/> 23. Learning/developed an	<input type="checkbox"/> 24. Learning/developed an

18) On the activities you marked in 17), please enter the corresponding number and tick in the oval below if by the above primary activities your group participated in while in America.



19) Please tick your group's satisfaction with the following conditions in America. (Please do not tick any boxes.)

<input type="checkbox"/> Very satisfied	<input type="checkbox"/> Satisfied	<input type="checkbox"/> Dissatisfied	<input type="checkbox"/> Very dissatisfied
<input type="checkbox"/> Very satisfied	<input type="checkbox"/> Satisfied	<input type="checkbox"/> Dissatisfied	<input type="checkbox"/> Very dissatisfied
<input type="checkbox"/> Very satisfied	<input type="checkbox"/> Satisfied	<input type="checkbox"/> Dissatisfied	<input type="checkbox"/> Very dissatisfied
<input type="checkbox"/> Very satisfied	<input type="checkbox"/> Satisfied	<input type="checkbox"/> Dissatisfied	<input type="checkbox"/> Very dissatisfied
<input type="checkbox"/> Very satisfied	<input type="checkbox"/> Satisfied	<input type="checkbox"/> Dissatisfied	<input type="checkbox"/> Very dissatisfied
<input type="checkbox"/> Very satisfied	<input type="checkbox"/> Satisfied	<input type="checkbox"/> Dissatisfied	<input type="checkbox"/> Very dissatisfied

20) Have you ever shared American culture with others?  YES  NO  Not sure (please tick in separate box)

20a) If yes, how many visits in the past 10 years? (Please tick in separate box)

1 visit  2 visits  3 visits  4 visits  5 visits  6-7 visits  8-10 visits  11-20 visits  21 or more

20b) In what season have you shared during the past 10 years? (Please tick in separate box)

Spring  Summer  Fall  Winter

20c) Please indicate how your best American has changed over time for the following features. (Please do not tick any boxes.)

<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American
<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American
<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American
<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American	<input type="checkbox"/> Best American

21) Which of the following ideas have you in the past or will you in the future? (Please tick in separate box if not applicable.)

<input type="checkbox"/> 1. You are a	<input type="checkbox"/> 2. You are a	<input type="checkbox"/> 3. You are a	<input type="checkbox"/> 4. You are a	<input type="checkbox"/> 5. You are a	<input type="checkbox"/> 6. You are a	<input type="checkbox"/> 7. You are a	<input type="checkbox"/> 8. You are a	<input type="checkbox"/> 9. You are a	<input type="checkbox"/> 10. You are a
<input type="checkbox"/> 11. You are a	<input type="checkbox"/> 12. You are a	<input type="checkbox"/> 13. You are a	<input type="checkbox"/> 14. You are a	<input type="checkbox"/> 15. You are a	<input type="checkbox"/> 16. You are a	<input type="checkbox"/> 17. You are a	<input type="checkbox"/> 18. You are a	<input type="checkbox"/> 19. You are a	<input type="checkbox"/> 20. You are a
<input type="checkbox"/> 21. You are a	<input type="checkbox"/> 22. You are a	<input type="checkbox"/> 23. You are a	<input type="checkbox"/> 24. You are a	<input type="checkbox"/> 25. You are a	<input type="checkbox"/> 26. You are a	<input type="checkbox"/> 27. You are a	<input type="checkbox"/> 28. You are a	<input type="checkbox"/> 29. You are a	<input type="checkbox"/> 30. You are a

22) Are you bonding with children under 10 years old?  YES  NO  Not sure

22a) If you have made did the children believe... (Please tick in separate box)

<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

23) What best describes your annual household income in US dollars? (Please tick in separate box)

Less than \$10,000  \$10,000 - \$20,000  \$20,000 - \$30,000  \$30,000 - \$40,000  \$40,000 - \$50,000  \$50,000 - \$60,000  \$60,000 - \$70,000  \$70,000 - \$80,000  \$80,000 - \$90,000  \$90,000 - \$100,000  More than \$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
<b>SAMPLE</b> 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



