

# **Winter Nonresident Travelers to Montana**

## **Profiles and Characteristics**

Prepared by

Kim McMahon

Kristin Aldred Cheek

Rita Black

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Institute for Tourism and Recreation Research

School of Forestry

The University of Montana

Missoula, MT

[www.forestry.umt.edu/itr](http://www.forestry.umt.edu/itr)

# Introduction

This report profiles winter travel groups to Montana and is intended to give the reader an accurate description of travel group characteristics categorized three ways: by all travelers, by primary reason for trip to Montana, and by location of travel party residence. These categories are discussed in the first three sections of this report.

The first section, *All Travelers*, highlights the average winter travel group to Montana. This section gives the reader an overall view of who these people are without further categorization. Montana's winter visitor, traveling to Montana between December 1, 1997, and March 31, 1998, was most likely passing through, was here for vacation, on business, or to visit family and friends.

The second section, *Primary Reason for Trip to Montana*, provides a description of the travel group based on why they visited Montana. On average, the vacation travel group, who represented 22 percent of the winter travel groups to the state, had the highest average daily expenditure of all the travel groups. This group made up 41 percent of all winter expenditures.

The third section, *Travel Party's Residence*, characterizes Montana visitor groups which reside in the states and provinces most widely represented by winter travelers. Washington, North Dakota, Idaho, Wyoming, Alberta, and Minnesota represent nearly two-thirds of all winter visitor groups to Montana.

The fourth section, *Winter Travel Marketing*, outlines some of the possible winter marketing strategies that can be concluded from the winter nonresident travel study. The vacation, pass-through, business, visiting family/friends, geographic, and former resident markets are discussed as well as the possible marketing potential of the sales tax issue in Montana.

Finally, the three appendices in this report provide 1) a list of responses to the survey questions where the visitor groups checked "Other, please specify", 2) a copy of the "front-end" intercept questions asked of the visitor groups, and 3) a copy of the survey given to each intercepted visitor group.

# Methodology

## *Study Population*

Travelers to Montana during the winter of 1997-98 (December 1, 1997, through March 31, 1998) 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.

## *Study Goals and Objectives*

A statewide travel survey was administered during the four-month study period. The goals of this study were:

- 1) To estimate the size of the traveler population.
- 2) To estimate travel group expenditures in the state.
- 3) To describe travel group characteristics including:
  - purposes of trip.
  - attractions for pleasure travel.
  - travel group characteristics and demographics.
  - locations and length of travel and overnight stays.
  - amount of expenditures.
  - recreational activities engaged in by visitors.
  - types of information used prior to trip.
  - methods of transportation.
  - repeat visitors to Montana.
  - comments of respondents.

## *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 major airports and highway border crossings. Major airports included

the six commercial airports with scheduled passenger flights arriving from outside Montana: Billings, Bozeman, Great Falls, Helena, Kalispell, and Missoula (West Yellowstone's airport is closed during the winter months). Forty-two roadway locations were considered entry points into the state. The entry points (i.e., interstates, primary highways, secondary highways, and minor roads) were inclusive of all paved roads and most unpaved roads that crossed Montana borders.

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

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

Second, surveyors identified resident-nonresident proportions at 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 1, 1997, and March 31, 1998, ITRR staff intercepted nonresident highway travel groups at interstate rest areas, gas stations, and Canadian border crossings. Air travel parties were met in airports while waiting for departing flights from Montana.

When contacted, preliminary data was collected from the travel groups, including entry location, group size and type, residence, travel method, purpose of trip, first-time visit vs. repeat visit to Montana, 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 then return it by mail in a postage-paid envelope that was provided. During the

four-month study period, 1,838 groups were contacted. Useable questionnaires were returned by 920 groups for a response rate of 50 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 inappropriate and impossible to mail replacement questionnaires to non-respondents, as is the norm in mail survey methodology. Therefore, a response rate of 50 percent is thought to be acceptable for a 'first (and only) mailing'.

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.

# Section 1

## All Winter Travelers to Montana

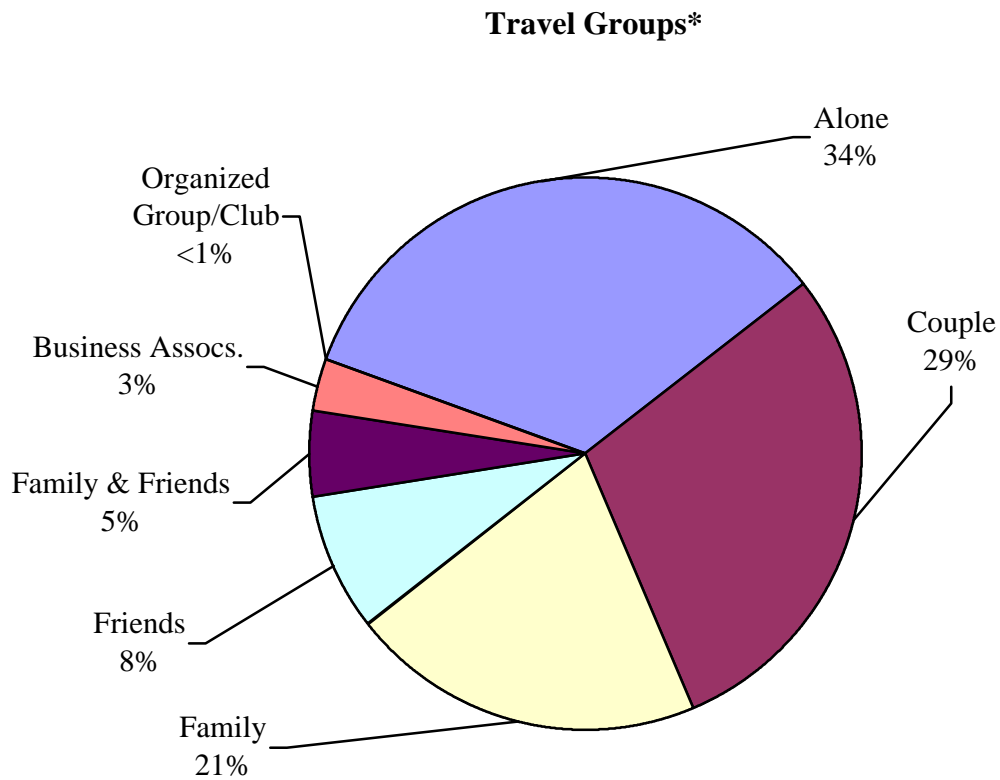
### *Executive Summary*

- Travel groups are from Washington, North Dakota, Idaho, Wyoming, Alberta, and Minnesota.
- The most frequent traveler was alone, followed by groups of couples and family.
- Nearly one-third of the winter traveler groups were passing through the state. Vacationers and those here on business each represented nearly another quarter of all winter travel groups.
- Downhill skiing/snowboarding, snowmobiling, and visiting family and friends each attracted at least one-fifth of winter travel groups who stated vacation as one reason for visiting the state.
- 73 percent of winter visitor groups participated in activities during their travel in Montana, with recreational shopping, visiting family and friends, and wildlife watching topping the list.
- 21 percent of winter travel groups flew for a portion of their trip to Montana.
- 54 percent of all winter travel groups stayed at least one night in a hotel/motel in Montana.
- The average length of stay for winter visitor groups was 4 days (3 nights).
- 24 percent of all winter travel groups have previously lived in Montana.
- 98 percent of all winter travel groups have visited the state in the past 10 years, and 96 percent plan to visit again in the next 2 years.
- 35 percent of all winter travel groups planned all their stops prior to the trip.
- One-half of all winter travel groups did not use any source of information for planning their trip prior to arriving in Montana.
- If information sources were used for pre-trip planning, an automobile club such as AAA was the most frequently used source.
- The *average daily group expenditure* was \$96 for *all* winter travel groups, with restaurant/ bar, gasoline/oil, lodging, and retail sales accounting for more than 80 percent of these expenditures.
- Of *just* those groups who spent money in Montana, retail sales, services, auto rental/repair/transportation fares, and lodging were the top 4 categories of spending.
- The average winter travel group size was 2.3 visitors.
- 30 to 49 years old was the most frequent age group of all visitors to Montana, followed by 50 to 64 years old.

## Winter Travel Group Characteristics

Most winter visitors to Montana traveled alone (34%), but half either traveled as couples or with family. Less than one percent traveled with an organized group or club (Figure 1.1). The small percentage of those traveling with an organized group or club was reflective of the sampling frame which did not include commercial buses or tours.

Figure 1.1: Winter Travel Groups



\*Total may not equal 100% due to rounding.

## *Purpose of Trip to Montana in Winter*

Nonresident travel parties were asked *all* reasons for traveling to Montana. Nearly half of the visitor groups were traveling to Montana at least partially for vacation. Other popular purposes of trip included visiting friends or relatives (36%) and passing through the state (32%) (Table 1.1).

After indicating all reasons for traveling to Montana, travel parties chose their *primary* reason for visiting the state. Passing through the state was the most common reason for being in Montana during the winter months. However, vacation, business, and visiting family and friends were also popular reasons (Table 1.2).

Table 1.1: All Reasons For Winter Trip to Montana

All Reasons for Winter Trip to Montana	Percent*
Vacation/Recreation/Pleasure	43%
Visit Family and Friends	36%
Just Passing Through	32%
Business	27%
Shopping	13%
Other Reasons**	5%
Attending a Convention or Meeting	4%
Medical	2%

\*Column totals more than 100% because visitor groups could have more than one purpose of trip.

\*\*See Appendix A for written responses.

Table 1.2: *Primary* Reason For Winter Trip to Montana

Primary Reason for Winter Trip to Montana	Percent*
Just Passing Through	32%
Vacation/Recreation/Pleasure	20%
Business	21%
Visit Family and Friends	18%
Other Reasons**	4%
Shopping	2%
Attending a Convention or Meeting	1%
Medical	1%
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.

\*\*See Appendix A for written responses.



## Winter Attractions to Montana

Many travel groups (43%) indicated vacation as one reason for traveling in Montana in winter. These groups then indicated what attracted them to the state. Most groups had more than one attraction, but the mountains (61%) and open space/uncrowded areas (51%) were the most popular attractions. Visiting family and friends (36%), downhill skiing/ snowboarding (33%), and snowmobiling (31%) were also attractions to the state (Table 1.3).

Downhill skiing (22%) was the most popular *primary* attraction followed by snowmobiling (20%) and visiting family/friends (20%) (Table 1.4).

Table 1.3: All Winter Attractions to Montana for Vacationers

All Attractions to Montana	Percent*
Mountains	<b>61%</b>
Open Space/Uncrowded Areas	51%
Visiting Family/Friends	36%
Downhill Skiing/Snowboarding	33%
Snowmobiling	31%
Wildlife	30%
Rivers/Lakes	27%
Yellowstone National Park	25%
Glacier National Park	14%
Visiting Historic Sites	9%
Montana History	9%
Hunting	8%
Cross-country Skiing	7%
Northern Great Plains/Badlands	6%
Organized Sporting Event	5%
Native American Culture	5%
Other Attraction**	5%

\*Column totals more than 100% because visitor groups could choose more than one attraction.

\*\*See Appendix A for written responses.

Table 1.4: *Primary* Winter Attraction to Montana for Vacationers

Primary Attraction to MT	Percent*
Downhill Skiing/Snowboarding	<b>22%</b>
Snowmobiling	20%
Visiting Family/Friends	20%
Open Space/Uncrowded Areas	14%
Mountains	8%
Yellowstone National Park	6%
Organized Sporting Event	2%
Other Attraction**	2%
Rivers/Lakes	2%
Montana History	2%
Hunting	2%
Wildlife	1%
Native American Culture	1%
Cross-country Skiing	<1%
Visiting Historic Sites	<1%
Glacier National Park	<1%
Northern Great Plains/Badlands	--
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.

\*\*See Appendix A for written responses.

## ***Winter Method of Transportation: Fly vs. Drive***

Twenty-one percent of winter visitor groups flew on a commercial air carrier for a portion of their trip, and nine percent rented an automobile on their trip. Vehicle rentals for winter visitors occurred at varying locations inside and outside Montana. Seventy-one percent of automobile rentals occurred in Montana, and 29 percent occurred outside Montana. (Table 1.5).

Table 1.5: Fly vs. Drive Winter Visitors to Montana

<b>Visitors Groups Who...</b>	<b>Percent</b>
Flew for any portion of their trip	21%
Rented an automobile on their trip	9%
<b>Location of Automobile Rentals*</b>	
<b>Montana Cities (71% of rentals):</b>	<b>Other Locations (29% of rentals):</b>
Billings	Boise, Idaho
Belgrade	Calgary, Alberta
Bozeman	Chicago, Illinois
Butte	Grand Junction, Colorado
Great Falls	Jackson, Wyoming
Havre	Kamkoops, British Columbia
Helena	Salt Lake City, Utah
Kalispell	Spokane, Washington
Livingston	Tacoma, Washington
Missoula	
Whitefish	

\*Based only on those groups who rented an automobile on their trip.

## ***Nights in Montana, Types of Accommodations, and Land Owners/ Former Residents for Winter Travel Groups***

Visitor groups indicated how many nights they spent in Montana while on their winter trip. Twenty percent of visitor groups did not spend any nights in the state. Twenty-one percent stayed one night, 16 percent stayed two nights, and 11 percent stayed three nights in Montana. Only 2 percent of visitor groups stayed 15 or more nights in the state (Table 1.6). The average length of stay in Montana for winter visitor groups was 3 nights (4 days).

Winter visitor groups who stayed at least one night in Montana indicated the number of nights spent in different types of accommodations. Travel groups who stayed at least one night in Montana were more likely to stay in a hotel than any other type of accommodation (54%). Private homes were also popular among visitor groups (24%) (Table 1.7). However, if visitor groups spent any nights in Montana, they generally spent one or two nights in a motel (Tables 1.8 - 1.11).

It is interesting to note the proportion of winter visitor groups who either currently own property in Montana (6%) or have lived here before this trip (24%) (Table 1.12).

Table 1.6: Number of Nights in Montana in Winter

<b>Number of Nights Spent in Montana</b>	<b>Percent*</b>
0 Nights	20%
1 Night	<b>21%</b>
2 Nights	16%
3 Nights	11%
4 Nights	9%
5 Nights	5%
6 Nights	5%
7 Nights	5%
8 - 14 Nights	7%
15+ Nights	2%
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.

Table 1.7: Types of Winter Accommodations Used

<b>Type of Accommodation</b>	<b>Percent Who Spent at Least One Night*</b>
Hotel/Motel/Bed & Breakfast	<b>54%</b>
Private Home	24%
Resort/Condominium	4%
Rented Home/Cabin	2%
Vehicle in Parking Area	2%
Private Campground	1%
Guest Ranch	<1%
Public Land Camping	<1%
Other Locations**	<1%

\* Rows total more than 100% because visitor groups could stay at more than one type of accommodation.

\*\*See Appendix A for written responses.

Table 1.8: Number of Nights Spent in a Hotel in Montana in Winter

Number of Nights Spent in a Hotel in Montana	Percent*
0 Nights	<b>46%</b>
1 Night	20%
2 Nights	12%
3 Nights	7%
4 Nights	6%
5 Nights	3%
6 Nights	2%
7 Nights	2%
8 - 14 Nights	2%
15+ Nights	--
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.

Table 1.9: Number of Nights Spent in a Private Home in Montana in Winter

Number of Nights Spent in a Private Home in MT	Percent*
0 Nights	<b>76%</b>
1 Night	4%
2 Nights	4%
3 Nights	3%
4 Nights	4%
5 Nights	2%
6 Nights	1%
7 Nights	2%
8 - 14 Nights	3%
15+ Nights	2%
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.

Table 1.10: Number of Nights Spent at a Resort/Condominium in Montana in Winter

Number of Nights Spent at a Resort/Condominium in MT	Percent*
0 Nights	<b>96%</b>
1 Night	<1%
2 Nights	<1%
3 Nights	1%
4 Nights	<1%
5 Nights	1%
6 Nights	<1%
7 Nights	1%
8 - 14 Nights	<1%
15+ Nights	--
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.

Table 1.11: Number of Nights Spent in a Rented Home/Cabin in Montana in Winter

Number of Nights Spent in a Rented Home/Cabin in Montana	Percent*
0 Nights	<b>98%</b>
1 Night	<1%
2 Nights	--
3 Nights	<1%
4 Nights	1%
5 Nights	<1%
6 Nights	<1%
7 Nights	<1%
8 - 14 Nights	<1%
15+ Nights	<1%
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.

Table 1.12: Winter Property Owners and Former Residents

Visitor Groups Who...	Percent
Currently Own Property in Montana	6%
Have Lived in Montana Before This Trip	24%



## *First Time vs. Repeat Winter Visitors*

Ninety-eight percent of winter visitor groups visited Montana before this trip, and ninety-six percent plan to visit again within the next two years. Of the repeat visitor groups, many have made a number of trips to the state in the last 10 years (Table 1.13). Over one-fourth of all winter visitor groups to Montana have made more than 30 trips to the state in the past 10 years, which is an average of at least 3 trips per year.

Table 1.13: Number of Trips to Montana in Past 10 Years and Season of Those Visits

<b>Number of Trips to Montana in Past 10 Years</b>	<b>Percent*</b>
0 Visits	2%
1 - 10 Visits	<b>47%</b>
11 - 20 Visits	16%
21 - 30 Visits	8%
31+ Visits	28%
<b>Total</b>	<b>100%</b>
<b>Season of Visits to Montana in Past 10 Years</b>	<b>Percent**</b>
Spring	63%
Summer	80%
Fall	66%
Winter	<b>86%</b>

\*Percent total may not equal 100% due to rounding.

\*\*Percent total equals more than 100% because visitor groups could have visited in more than one season.

## *Flexibility of Winter Travel Plans and Pre-Trip Planning*

Visitor groups were asked how flexible their travel plans were on their trip. While the largest percentage of groups had pre-determined destinations throughout the state (35%), at least some unplanned stops were not out of the question for 65 percent of travel groups (Table 1.14).

Seventeen percent of winter travel groups traveled with children under 18 years old. Of those groups, 60 percent felt the children provided at least some influence on the planning of their trip and 75 percent felt they provided at least some influence on the activities done on the trip. On a scale from 1 (no influence) to 5 (great influence), the average response from these groups was 2.7 for children's influence on planning of the trip (between "little influence" and "some influence") and 3.1 for children's influence on what was done on the trip (slightly more than "some influence").

Table 1.14: Flexibility of Winter Travel Plans

<b>Group's Flexibility of Travel Plans</b>	<b>Percent*</b>
All places I want to visit have been planned in advance	<b>35%</b>
Most places I want to visit have been planned, but I might take a few unplanned stops	22%
Some places I want to visit have been planned, but my plans are fairly flexible	12%
I only have a few definite places in mind I want to visit, so my plans are quite flexible	13%
I don't have any definite places in mind I want to visit, so my plans are very flexible	18%
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.



## *Information Sources Used by Winter Travel Groups*

Nonresident travel parties indicated which sources were used to gather information for their trip prior to arriving in Montana and, of those sources, which one was most useful to them. A list of 11 information sources was included in the questionnaire. Over half of the visitors did not use any of these sources prior to their trip. The top three most frequently used information sources were an automobile club such as AAA (14%), information from private businesses (10%), and the Internet (9%) (Table 1.15). The sources of information that were *most useful* were "other" sources (such as family/friends, maps/atlases, and newspaper/magazine ads) (29%), as well as automobile clubs such as AAA (23%), and private businesses (14%) (Table 1.16).

Table 1.15: Sources of Information Used For Trip Prior to Winter Visit in Montana

<b>Sources of Information Used For Trip Prior to Visit in Montana</b>	<b>Percent*</b>
None of the Sources	<b>51%</b>
Automobile Club	14%
Info From Private Business	10%
Internet Travel Information	9%
Travel Agency	7%
Guide Book	6%
National Park Brochures/Books	4%
Chamber or Visitor Bureau	4%
Montana Travel Planner	3%
Toll Free State Travel Number	3%
Other Sources**	16%

\*Column totals more than 100% because visitors could choose more than one information source.

\*\*See Appendix A for written responses.

Table 1.16: *Most Useful* Source of Information Used For Trip Prior to Winter Visit in Montana

<b>Most Useful Source of Information Used For Trip Prior to Visit in MT</b>	<b>Percent*</b>
Other Sources**	<b>29%</b>
Automobile Club	23%
Info From Private Business	14%
Travel Agency	10%
Internet Travel Information	9%
Guide Book	6%
Chamber or Visitor Bureau	4%
Montana Travel Planner	2%
National Park Brochures/Books	2%
Toll Free State Travel Number	2%
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.

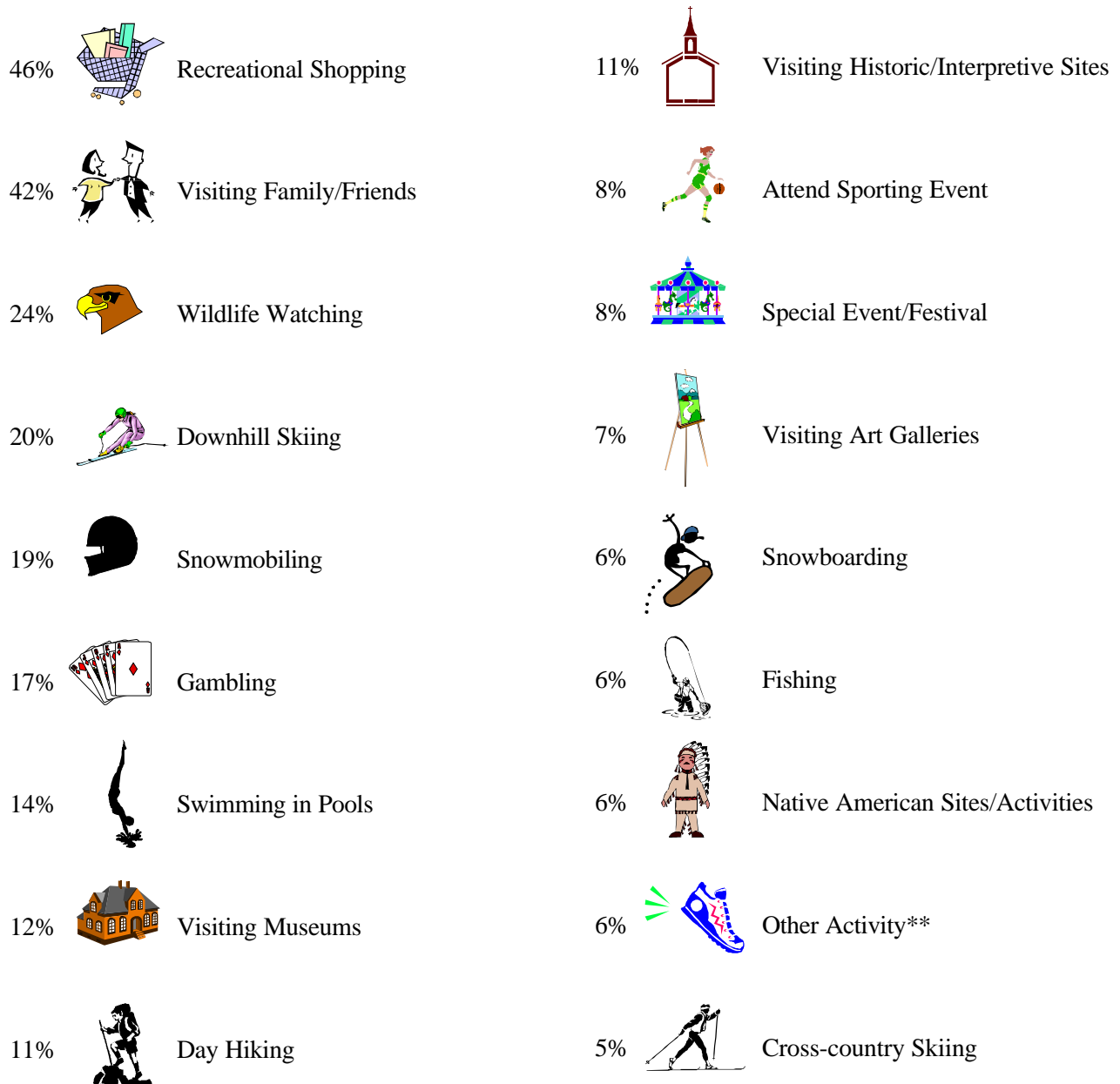
\*\*See Appendix A for written responses.



## Winter Activity Participation

Winter visitor groups engaged in many activities. Shopping, visiting family/friends, wildlife watching, downhill skiing, and snowmobiling were the top 5 activities engaged in by winter visitor groups (Figure 1.2).

Figure 1.2: Activity Participation by Winter Visitor Groups in Montana\*



\*Percent total equals more than 100% because visitor groups could have participated in more than one activity.

\*\*See Appendix A for written responses.

## 1997-98 Winter Visitor Group Expenditures

Nonresident visitor groups spent a total of approximately \$240 million during the 1997-98 winter season. About 611,000 groups spent \$96 per day and stayed an average of four days.

Their money was spent primarily on restaurants and bars (23%, or \$55 million), gasoline and oil (21%, or \$50 million), lodging (20%, or \$47 million), and retail goods (19%, or \$46 million) (Table 1.17). Nonresident winter travelers paid about \$10 million in Montana gasoline taxes and \$1.7 million in bed tax, in addition to the various taxes paid by the businesses and employees supported by nonresident spending. While the distribution of spending will likely remain fairly constant for at least the next few years, the actual dollar amount will vary with visitation levels in the state.

Table 1.17: Average Expenditures for All Winter Visitor Groups to Montana

Sector	Total Spending (millions)	Distribution by Sector	Average per day, per group
<b>Lodging: Hotel, B&amp;B, Camp, RV</b>	\$47	20%	\$19
<b>Auto rental/repair, transportation fares</b>	\$8	3%	\$3
<b>Gasoline, oil</b>	\$50	21%	\$20
<b>Restaurant, bar</b>	<b>\$55</b>	<b>23%</b>	<b>\$22</b>
<b>Groceries, snacks</b>	\$12	5%	\$5
<b>Retail sales</b>	\$46	19%	\$19
<b>Services</b>	\$23	10%	\$9
<b>Total*</b>	<b>\$240</b>	<b>100%</b>	<b>\$96</b>

\*Column totals may not equal indicated totals due to rounding.

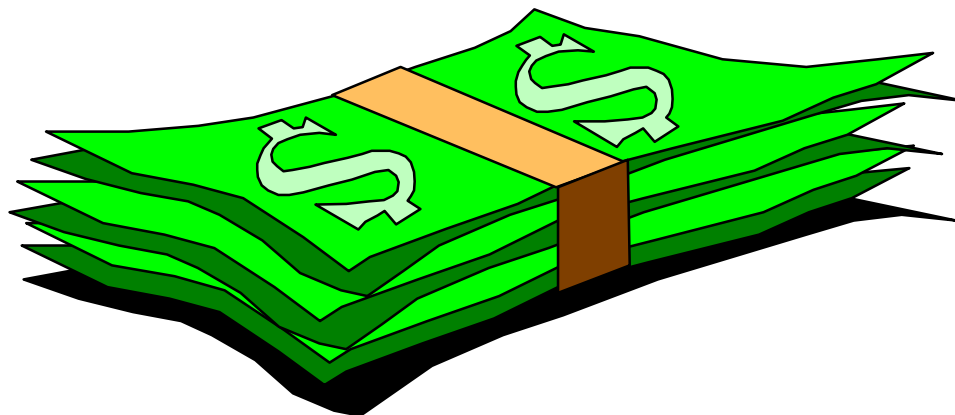
There are a couple of different ways to look at groups' average daily expenditures. In order to calculate total expenditures for the winter season, the average daily expenditure for *all* groups, including those that did *not* spend money, was calculated. As stated above, this figure was \$96. This amount was used in conjunction with the average length of stay for all groups (4 days) and the total number of groups (611,000) to calculate total expenditures for the winter season (\$240 million).

Visitors also provided information about *how* they spent their money, which was used to show how expenditures were distributed across various sectors of the economy. On a per group, daily basis these figures might seem somewhat low (Table 1.17). This is because the average expenditure reflects the spending of all groups, including those who either spent very little money or no money in the state. These figures were needed to understand the total expenditure profile, but are less useful when trying to understand actual spending habits for those who *did* spend money. These habits become clear when visitor spending is analyzed for *only* the visitor groups who spent money (Table 1.18).

Table 1.18: Average Expenditures for Winter Visitor Groups Who Spent Money in Montana

Sector	Average per day, per group
<b>Lodging: Hotel, B&amp;B, Camp, RV</b>	\$61
<b>Auto rental, repair &amp; transportation fares</b>	\$63
<b>Gasoline, oil</b>	\$28
<b>Restaurant, bar</b>	\$33
<b>Groceries, snacks</b>	\$15
<b>Retail sales</b>	<b>\$66</b>
<b>Services</b>	\$65

When a group did spend money in the retail, services, auto-related, or lodging sectors, the group generally spent over \$60 at a time. In some cases, the average group expenditure might seem relatively large, while the overall total looks much less significant. This is because there are some spending categories that did not experience as much activity as others. For example, many groups had gasoline expenditures, but far fewer groups spent money on auto rental, repair, and transportation fares. Therefore, Table 1.18 shows how much a group tended to spend *if* it had an expenditure in a particular sector, while Table 1.17 shows *overall* expenditures based on the spending habits of *all* groups.



# Winter Visitor Demographics

The average travel party size of Montana visitors was 2.3.

Figure 1.3 examines the ages of visitors by gender. Thirty-five percent of male visitors were 30 - 49 years old and 26 percent were 50 – 64 years old. Thirty-six percent of female visitors were 30 - 49 years old and 24 percent were 50 – 64 years old. Winter visitors to Montana, whether male or female, were least likely to be 65 years old or older.

Nearly half of all winter visitor groups resided in states bordering Montana or Canadian provinces just north of the state (Alberta, British Columbia, Saskatchewan). Another 15 percent resided in Washington, and 6 percent were Minnesotans. Travelers residing in other US states represented 28 percent of the winter visitor population (Table 1.19).

Figure 1.3: Age of Winter Visitors by Gender

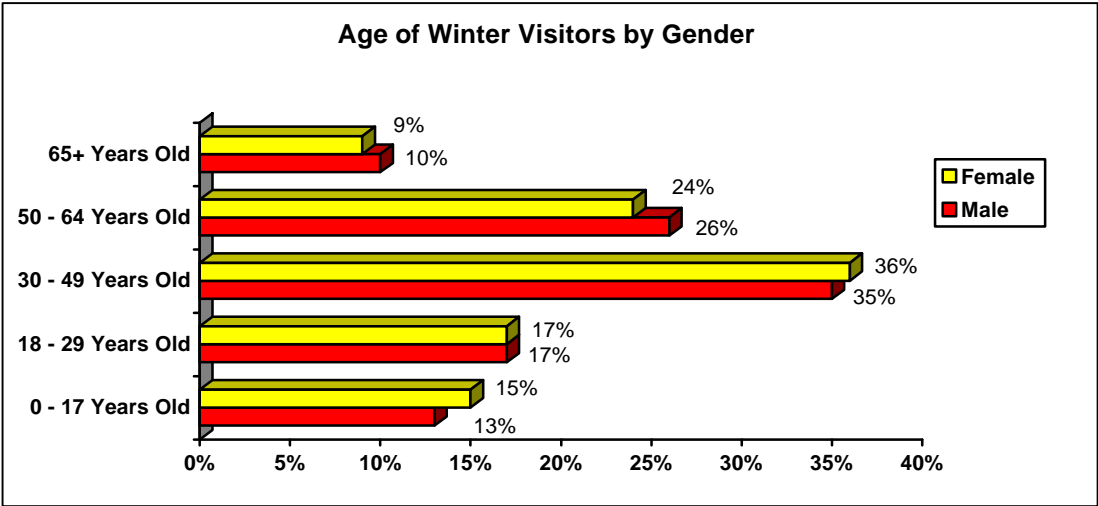


Table 1.19: Winter Travel Party's Residence

Winter Travel Party's Residence	Percent*
Washington	15%
North Dakota	14%
Idaho	11%
Wyoming	9%
Alberta	9%
Minnesota	6%
Alaska, California, Colorado, Utah, British Columbia, Saskatchewan	3% each
Michigan, Oregon, South Dakota	2% each
All Other US States	12%
Canadian Provinces Excluding Alberta, Saskatchewan, and British Columbia	1%
Foreign Countries Excluding Canada	<1%
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.



# Section 2

## Primary Reason for Winter Trip to Montana

### *Executive Summary*

The following descriptions highlight statistics about visitor groups based on their primary reason for visiting Montana in the winter. Table 1.0 at the end of this summary provides data on these groups for comparison purposes.

#### **Passing through** (32% of **winter** visitor groups)

- The primary reason for traveling in Montana for these groups was to pass through the state. However, when asked all reasons for visiting Montana, 4 percent also vacationing and 4 percent were also visiting family and friends.
- These visitor groups most frequently traveled as couples, followed by lone travelers and family groups.
- The mountains, rivers/lakes, open space/uncrowded areas, and Yellowstone National Park were the top attractions for these visitor groups if they were on vacation while passing through the state.
- All automobiles rented by these travel groups were rented outside Montana.
- Nearly 80 percent of travel groups passing through Montana spent zero or one night in the state. Of those groups that spent a night, nearly one-half spent it in a motel.
- 98 percent of visitor groups passing through the state have visited Montana in the past 10 years, and 92 percent plan to visit again in the next 2 years.
- 65 percent of groups passing through the state had at least some level of flexibility in their travel plans, but almost one-half of the groups did not use an information source.
- 56 percent of groups passing through the state did not participate in any activities while traveling through Montana. However, groups that did participate enjoyed shopping, gambling, wildlife watching, visiting family and friends, and visiting historic/interpretive sites.
- The average daily group expenditure for those passing through was \$64 per day, 42 percent of which was spent on gasoline/oil. These groups only accounted for 10 percent of all winter expenditures while making up for 32 percent of all travel groups.
- The average group size was 2.2 for these travel groups, with males and females nearly equally represented.
- These groups resided in Alberta and Washington more frequently than other US states or Canadian provinces.

**Business (21% of winter visitor groups):**

- All of these groups were primarily in Montana for business. However, when asked all reasons for visiting Montana, 5 percent were also here for vacation, 5 percent were visiting family and friends, 5 percent were passing through, and 5 percent were attending a convention.
- 61 percent of these travelers were alone, with the remaining generally traveling as families, couples, or with business associates.
- The mountains, open space/uncrowded areas, wildlife, and Glacier National Park were the biggest draws for these groups if they combined business with pleasure.
- Nearly one-third of all business travelers flew for a portion of their trip, and 88% of automobile rentals to these groups occurred in Montana.
- Business travelers had an average length of stay of 4.4 days (3 nights) in the state, with 73 percent staying in hotels.
- 20 percent of these groups had previously lived in the state.
- 92 percent were repeat visitors, and 97 percent planned to visit again in the next 2 years. Of those groups who had visited Montana in the past 10 years, almost 40 percent had visited an average of three or more times per year.
- Only 45 percent of these travel groups had some flexibility in their travel plans, and less than one-half used an information sources for planning their trip.
- 36 percent of business travelers did not participate in any activities while in Montana, but shopping, visiting family and friends, wildlife watching, gambling, and swimming in a pool were popular activities among those who did participate.
- Business travel groups had an average daily expenditure of \$101, second only to that of vacationers. 26 percent of their expenditures were spent in restaurants and bars, and 25 percent went to lodging.
- The average group size for these business groups was 1.6, and there were twice as many males as females traveling for this reason.
- These groups were generally from Washington, North Dakota, Idaho, and Wyoming.

**Vacation/recreation/pleasure (20% of winter visitor groups):**

- Vacation was the primary reason for traveling in Montana for these groups. However, when asked all reasons for visiting Montana, 22 percent of them were also here visiting family and friends, 14 percent were passing through, and 7 percent also conducted some business in the state.
- The majority of these groups either traveled as couples, with family, or with friends.
- They were most attracted to Montana by downhill skiing/snowboarding and snowmobiling.
- 80 percent of automobiles rented by these groups were rented in Montana, and almost one-fourth of these groups flew for a portion of their trip.
- The average length of stay for these groups was 5.4 days (4 nights) in Montana, and they typically spent them in a motel or private home.
- 17 percent of these travel groups had previously lived in Montana, 89 percent had a visited the state in the past 10 years, and 96 percent plan to visit again in the next 2 years.
- Only one-fourth of these visitor groups were rigid in their travel plans and had all their stops planned in advance.
- Just over one-half of these groups used an information source for planning their trip.
- 99 percent of these groups participated in some activity while in the state, with shopping, downhill skiing, snowmobiling, wildlife watching, and visiting family and friends being the most popular.
- Vacationers made up only 20 percent of traveler groups, but accounted for 41 percent of all winter expenditures. The average daily group expenditure was \$146, with 27% going to the restaurant/bar sector.
- Vacationers' average group size was 3.3, and males were usually more prominent than females on the trips.
- These travel groups were primarily from Minnesota, North Dakota, Washington, and Idaho.



**Visiting family/friends (18% of winter visitor groups):**

- All of these groups were primarily in Montana to visit family and friends. However, when asked all reasons for visiting Montana, 13 percent were also here for vacation, 13 percent were also conducting business, and 13 percent were passing through.
- These groups primarily traveled alone, but many others also traveled as couples or with families.
- Over one-fourth of these groups flew for a portion of their trip, and three-fourths of the automobiles rented by these groups were rented in Montana.
- The average length of stay for these groups was 6.1 days, or 5 nights. Two-thirds of these nights were spent in private homes, with nearly all of the remaining nights spent in a hotel.
- Nearly one-half of these groups had previously lived in Montana, and only 8 percent had not visited the state in the past 10 years. Nearly one-third of these repeat visitors had visited the state an average of three or more times per year since the winter of 1987-88.
- 97 percent of these groups plan to visit again in the next 2 years.
- 80 percent of these travel groups had some flexibility in their travel plans while on their trip, but less than one-half of them used an information source for planning their trip.
- Only 7 percent of these groups did not participate in a recreation activity while in the state. For those that did participate, shopping, wildlife watching, gambling, and downhill skiing were the most popular activities, next to visiting with family and friends.
- Groups visiting family and friends stayed an average of 6.1 days (5 nights), and spent an average of \$68 per day. Their largest expenditures were on retail items, followed by restaurant/bar and gasoline/oil.
- The average group size for those visiting family and friends was 2.1, with males and females nearly equally represented.
- These travel groups generally come from North Dakota, Washington, and Idaho.

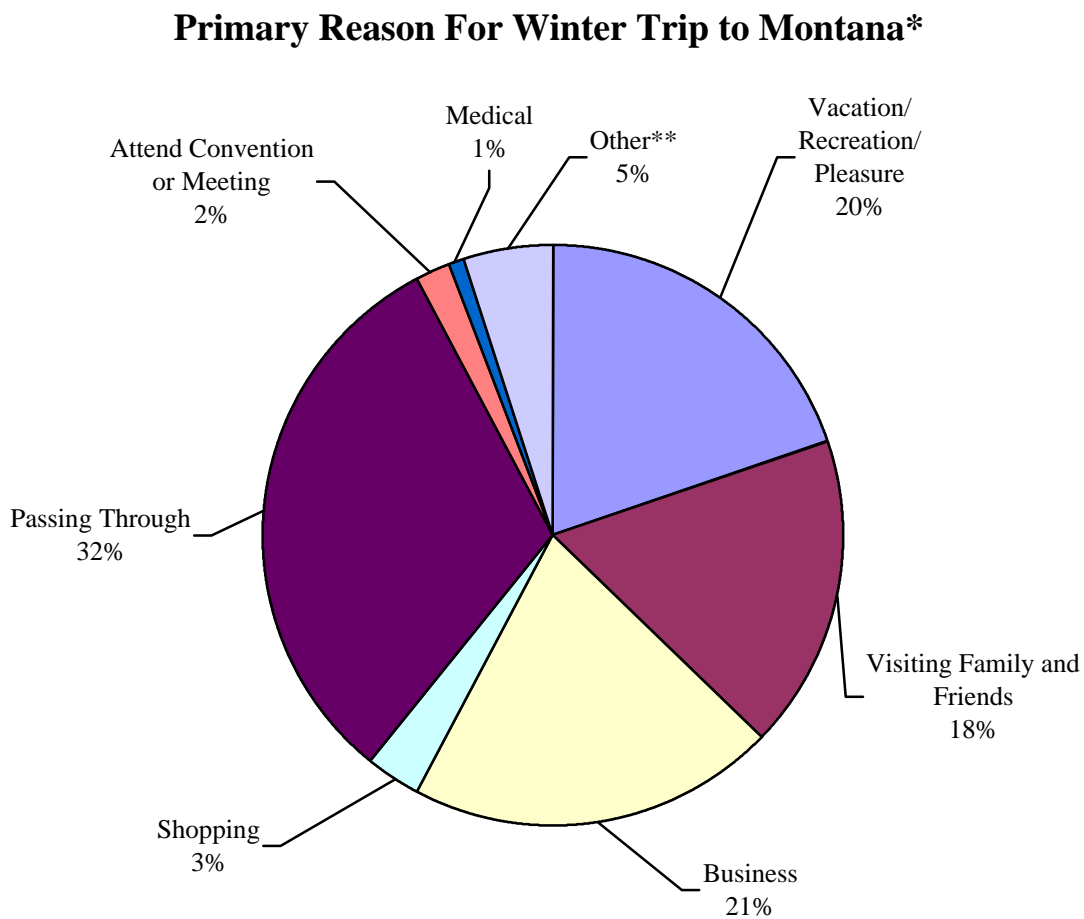
Table 2.0: Comparison Table of All Winter Travel Groups and Those Categorized by Primary Reason for Trip to Montana

Primary Reason	Passing Through (32%)	Business (21%)	Vacation (20%)	Visit Family/Friends (18%)	All Travelers
<b>Group Type</b>	Couple: 42% Alone: 26% Family: 23%	Alone: 61% Family: 14% Couple: 13%	Couple: 28% Family: 24% Friends 22%	Alone: 41% Couple: 29% Family: 21%	Alone: 34% Couple: 29% Family: 21%
<b>Visitors Who Flew During Trip</b>	10%	29%	21%	28%	21%
<b>Rented Automobile During Trip</b>	4	19%	12%	5%	9%
<b>Average Length of Stay (nights)</b>	1	3	4	5	3
<b>Average Daily Expenditure</b>	\$64	\$101	\$146	\$68	\$96
<b>% of All Winter Travel Groups</b>	32%	21%	20%	18%	100%
<b>% of All Winter Expenditures</b>	10%	23%	41%	19%	100%
<b>Total Expenditures (millions)</b>	\$23	\$56	\$99	\$46	\$240
<b>Top 3 Categories of Spending</b>	Gasoline/Oil: 42% Restaurant/bar: 18% Retail Sales: 17%	Restaurant/bar: 26% Lodging: 25% Gasoline/Oil: 16% Retail Sales: 16%	Restaurant/bar: 27% Lodging: 23% Gasoline/Oil: 15%	Retail Sales: 25% Restaurant/bar: 22% Gasoline/Oil: 21%	Restaurant/bar: 23% Gasoline/oil: 21% Lodging: 20%
<b>Ages of Male Visitors</b>	30 - 49: 27% 50 - 64: 27%	30 - 49: 49% 50 - 64: 28%	30 - 49: 37% 50 - 64: 26%	30 - 49: 31% 50 - 64: 20%	30 - 49: 35% 50 - 64: 26%
<b>Ages of Female Visitors</b>	30 - 49: 28% 50 - 64: 28%	30 - 49: 46% 50 - 64: 18% 0 - 17: 18%	30 - 49: 47% 0 - 17: 21% 50 - 64: 17%	30 - 49: 26% 50 - 64: 23%	30 - 49: 36% 50 - 64: 24%
<b>Group's Residence</b>	Alberta: 20% Washington: 15% North Dakota: 15%	Washington: 20% North Dakota: 14% Idaho: 12%	Minnesota: 16% North Dakota: 16% Washington: 15%	North Dakota: 13% Washington: 12% Idaho: 12%	Washington: 15% North Dakota: 14% Idaho: 9%

## *Purpose of Winter Trips to Montana*

Winter visitor groups were asked all reasons for traveling in Montana. After indicating all these reasons, visitors indicated which one was their *primary* reason for visiting the state. Thirty-two percent were primarily just passing through. Other primary reasons included vacation/recreation/pleasure (20%), business (21%), and visiting family and friends (18%). (Figure 2.1).

Figure 2.1: Primary Reason For Winter Trip to Montana



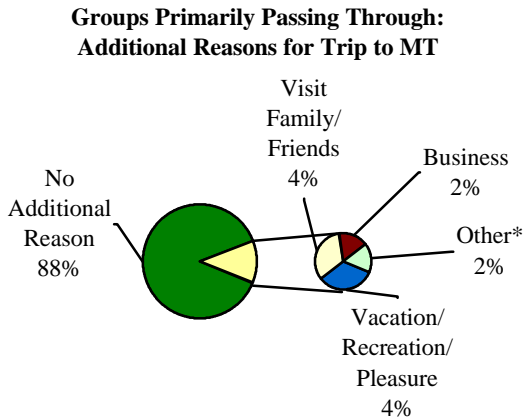
\*Totals may not equal 100% due to rounding.

\*\*See Appendix A for written responses.

## Other Reasons for Winter Trips to Montana

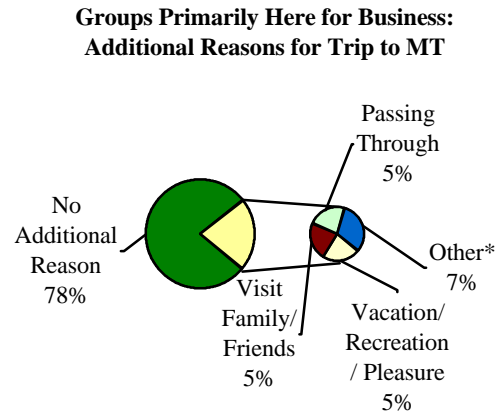
While winter travel groups indicated their primary reason for traveling in Montana, they also indicated additional reasons they were traveling in the state (Figures 2.2 - 2.5). For example, 22 percent of the groups primarily in Montana for vacation were also visiting family and friends.

Figure 2.2: Additional Reasons for Visiting Montana for Winter Visitor Groups Primarily Passing Through MT



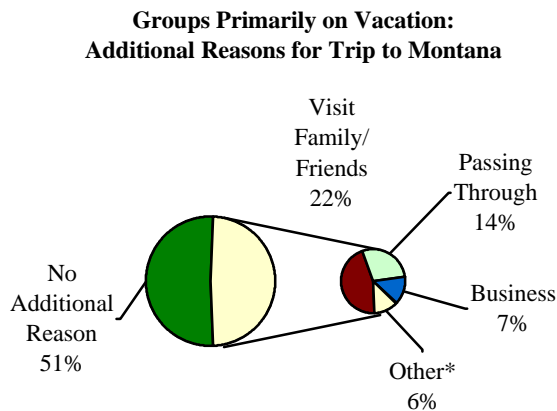
\*Other reasons include shopping, attend convention/meeting, medical, and other written responses (see Appendix A).

Figure 2.4: Additional Reasons for Visiting Montana for Winter Visitor Groups Primarily in MT for Business



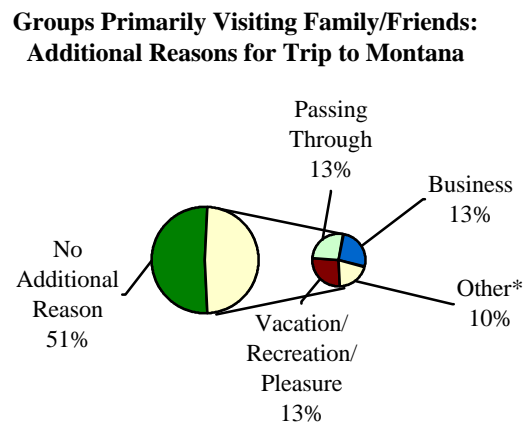
\*Other reasons include shopping, attend convention/meeting, medical, and other written responses (see Appendix A).

Figure 2.3: Additional Reasons for Visiting MT for Winter Visitor Groups Primarily in Montana for Vacation



\*Other reasons include shopping, attend convention/meeting, medical, and other written responses (see Appendix A).

Figure 2.5: Additional Reasons for Visiting Montana for Winter Visitor Groups Primarily in Montana to Visit Family and Friends



\*Other reasons include shopping, attend convention/meeting, medical, and other written responses (see Appendix A).

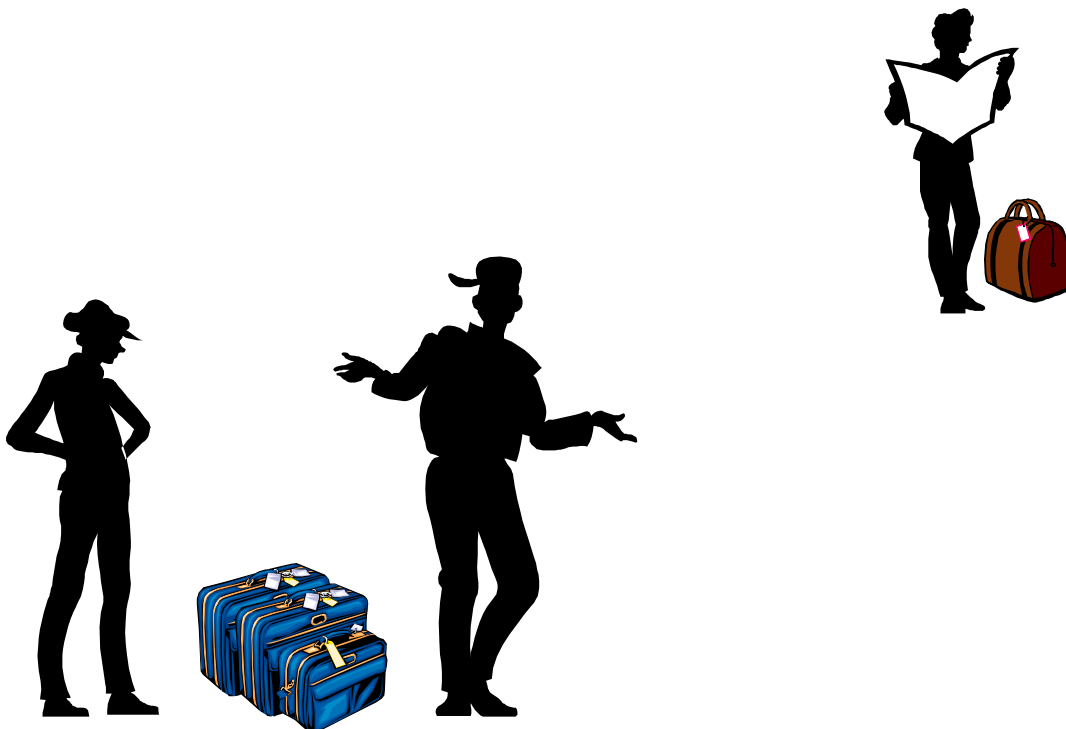
## Winter Travel Group Characteristics

Visitor groups traveling to Montana for vacation or just passing through the state were more likely to be traveling as a couple than any other type of travel group. Visitors to the state for business or visiting family and friends were most likely to be traveling alone. (Table 2.1).

Table 2.1: Winter Travel Group Type by Primary Reason For Winter Trip to Montana

Primary Reason for Winter Trip to Montana	Winter Travel Groups							Totals*
	Travel Alone	Travel as a Couple	Travel With Family	Travel With Friends	Travel With Family & Friends	Travel With Business Assoc.	Travel With Group or Club	
Passing Through	26%	<b>42%</b>	23%	5%	1%	1%	<1%	<b>100%</b>
Business	<b>61%</b>	13%	14%	2%	1%	10%	<1%	<b>100%</b>
Vacation/ Recreation/ Pleasure	10%	<b>28%</b>	24%	22%	15%	1%	1%	<b>100%</b>
Visit Family/ Friends	<b>41%</b>	29%	21%	6%	4%	--	--	<b>100%</b>

\*Totals may not equal 100% due to rounding.



## ***Winter Attractions to Montana***

Winter visitor groups who indicated vacation as *one* reason for their trip to Montana were asked what attracted them to the state. Attractions for groups primarily passing through, on business, or visiting family and friends are discussed in the text, while the attractions for visitor groups primarily in Montana for vacation are included in two tables.

It seems that there is at least some level of similarity between travel groups regardless of their primary reason for traveling in the state because they are usually attracted, at least partially, by Montana's vastness and open spaces. However, the following three groups were more similar to vacationers in terms of all attractions to the state (Table 2.2) than they were in terms of their primary attraction (Table 2.3). This is logical since vacationers intend to engage in activities that are more "leisurely".

### ***All Winter Attractions to Montana (excluding vacationers - see Table 2.2)***

<b><u>Group:</u></b>	<b><u>Passing Through</u></b>	<b><u>Business</u></b>	<b><u>Visit Family/Friends</u></b>
<b>Top</b>	-Mountains	-Mountains	-Family/Friends
<b>Attractions:</b>	-Rivers/Lakes -Open Space/Uncrowded Areas -Yellowstone National Park	-Open Space/Uncrowded Areas -Wildlife -Glacier National Park	-Mountains -Open Space/Uncrowded Areas

### ***Primary Winter Attraction to Montana (excluding vacationers - see Table 2.3)***

<b><u>Group:</u></b>	<b><u>Passing Through</u></b>	<b><u>Business</u></b>	<b><u>Visit Family/Friends</u></b>
<b>Top</b>	-Mountains	-Downhill Skiing/ Snowboarding	-Family/Friends
<b>Attractions:</b>	-Open Space	-Rivers/Lakes -Open Space	-Open Space



Table 2.2: All Types of Winter Attractions to Montana for Vacation Travel Groups

All Attractions to MT for Vacation/ Recreation/Pleasure Travel Groups	Percent*
Mountains	63%
Open Space/Uncrowded Areas	50%
Snowmobiling	44%
Downhill Skiing/Snowboarding	39%
Yellowstone National Park	34%
Wildlife	26%
Visiting Family/Friends	25%
Rivers/Lakes	21%
Northern Great Plains/Badlands	20%
Montana History	17%
Visiting Historic Sites	14%
Organized Sporting Event	9%
Hunting	7%
Cross-country Skiing	7%
Glacier National Park	6%
Other Attraction**	5%
Native American Culture	3%

\*Column totals more than 100% because visitor groups could choose more than one type of attraction.

\*\*See Appendix A for written responses.

Table 2.3: *Primary* Winter Attraction to Montana for Vacation Travel Groups

Primary Attraction to MT for Vacation/ Recreation/Pleasure Travel Groups	Percent*
Downhill Skiing/Snowboarding	<b>32%</b>
Snowmobiling	31%
Open Space/Uncrowded Areas	10%
Visiting Family/Friends	6%
Yellowstone National Park	5%
Organized Sporting Event	4%
Mountains	3%
Other Attraction**	3%
Montana History	2%
Hunting	2%
Visiting Historic Sites	2%
Wildlife	1%
Cross-country Skiing	1%
Glacier National Park	--
Native American Culture	--
Rivers/Lakes	--
Northern Great Plains/Badlands	--
<b>Total</b>	<b>100%</b>

\*Percent total may not equal 100% due to rounding.

\*\*See Appendix A for written responses.

## ***Winter Method of Transportation: Fly vs. Drive***

Winter business travel groups were more likely than any other group to fly and rent an automobile for part of their trip. Of those in Montana on business, a good majority of automobile rentals occurred in Montana. However, of those groups passing through the state, four percent rented an automobile for part of their trip, and those automobiles were rented in locations outside of Montana (Table 2.4).

Table 2.4: Fly vs. Drive Winter Visitors to Montana by Primary Reason for Winter Trip to Montana

<b>Primary Reason for Winter Trip to Montana</b>	<b>Winter Visitors Who Flew or Rented Automobiles on Their Trip to Montana</b>			
	<b>Flew for any portion of their trip</b>	<b>Rented an automobile for any portion of their trip</b>	<b>Rented an automobile in Montana*</b>	<b>Rented an automobile outside Montana*</b>
<b>Passing Through</b>	10%	4%	--	100% (57% Washington state)
<b>Business</b>	29%	19%	88%	12%
<b>Vacation/ Recreation/ Pleasure</b>	21%	12%	80%	20%
<b>Visit Family/ Friends</b>	28%	5%	76%	24%

\*Based on the percent of visitor groups who rented an automobile for any portion of their trip.



## ***Nights in Montana, Types of Accommodations, and Land Owners/ Former Residents for Winter Travel Groups***

Winter visitor groups reported the number of nights they stayed in Montana on their trip. Thirty-nine percent of those who were primarily passing through the state did not stay any nights in Montana and another 39 percent stayed only one night. Of those who were in Montana primarily to visit family and friends, 19 percent stayed at least two nights in the state, while vacationers were most likely to spend three nights (Table 2.5).

Visitor groups who stayed at least one night in Montana indicated the number of nights spent in different types of accommodations. Of those visitor groups who were in Montana primarily for vacation, 66 percent stayed at least one night in a hotel, 23 percent stayed at least one night in a private home, and 16 percent stayed at least one night in a resort or condominium. Of those visitor parties who were in Montana primarily to pass through the state, 48 percent stayed at least one night in a hotel. Seventy-three percent of visitor groups in Montana primarily for business stayed at least one night in a hotel and 13 percent stayed at least one night at a private home. Of those visitor groups who were in the state primarily to visit family and friends, 67 percent stayed at least one night at a private home, while another 31 percent stayed at least one night in a motel (Tables 2.6 - 2.10). Given the percentage of nights spent in private homes by these visitor groups, it's not surprising that so many groups had either lived in Montana before this trip or currently own property in the state (Table 2.11).



Table 2.5: Number of Nights Spent in Montana by Primary Reason For Winter Trip to Montana

Primary Reason For Winter Trip to Montana	Number of Nights Spent in Montana										Totals*
	0 Nights	1 Night	2 Nights	3 Nights	4 Nights	5 Nights	6 Nights	7 Nights	8 - 14 Nights	15 + Nights	
Passing Through	39%	39%	15%	5%	2%	--	--	--	--	--	100%
Business	15%	23%	18%	11%	10%	7%	3%	5%	7%	<1%	100%
Vacation/ Recreation/ Pleasure	5%	7%	11%	17%	13%	13%	12%	10%	11%	<1%	100%
Visit Family/ Friends	10%	7%	19%	11%	16%	4%	6%	5%	18%	5%	100%

\*Totals may not equal 100% due to rounding.

Table 2.6: Type of Accommodations Used by Primary Reason For Winter Trip to Montana

Primary Reason For Winter Trip to MT	Types of Accommodations Percent Who Spent at Least one Night*								
	Hotel/Motel/ Bed & Breakfast	Guest Ranch	Resort/ Condominium	Rented Home/Cabin	Private Home	Vehicle in Parking Area	Public Land Camping	Private Campground	Other Locations**
Passing Through	48%	--	--	--	7%	4%	<1%	3%	--
Business	73%	1%	1%	1%	13%	2%	--	--	<1%
Vacation/ Recreation/ Pleasure	66%	2%	16%	3%	23%	--	--	<1%	<1%
Visit Family/ Friends	31%	--	1%	5%	67%	1%	--	--	--

\*Rows do not total 100% because not all visitor group spent a night in Montana.

\*\*See Appendix A for written responses.

Table 2.7: Number of Nights Spent in a Hotel/Motel/Bed & Breakfast in Montana by Primary Reason For Winter Trip to Montana

Primary Reason For Winter Trip to Montana	Number of Nights Spent in a Hotel/Motel/Bed & Breakfast in Montana										Totals*
	0 Nights	1 Night	2 Nights	3 Nights	4 Nights	5 Nights	6 Nights	7 Nights	8 - 14 Nights	15 + Nights	
Passing Through	52%	33%	10%	4%	1%	--	--	--	--	--	100%
Business	27%	20%	17%	9%	12%	6%	2%	4%	3%	--	100%
Vacation/ Recreation/ Pleasure	34%	12%	11%	11%	8%	9%	8%	3%	4%	--	100%
Visit Family/ Friends	69%	11%	9%	4%	6%	--	1%	--	--	--	100%

\*Totals may not equal 100% due to rounding.

Table 2.8: Number of Nights Spent in a Private Home in Montana by Primary Reason For Winter Trip to Montana

Primary Reason For Winter Trip to Montana	Number of Nights Spent in a Private Home in Montana										Totals*
	0 Nights	1 Night	2 Nights	3 Nights	4 Nights	5 Nights	6 Nights	7 Nights	8 - 14 Nights	15 + Nights	
Passing Through	93%	6%	--	--	1%	--	--	--	--	--	100%
Business	87%	3%	4%	2%	3%	<1%	<1%	<1%	1%	--	100%
Vacation/ Recreation/ Pleasure	77%	4%	1%	5%	3%	3%	2%	3%	2%	1%	100%
Visit Family/ Friends	33%	6%	12%	7%	10%	3%	5%	4%	15%	5%	100%

\*Totals may not equal 100% due to rounding.

Table 2.9: Number of Nights Spent at a Resort/Condominium in Montana by Primary Reason For Winter Trip to Montana

Primary Reason For Winter Trip to Montana	Number of Nights Spent at a Resort/Condominium in Montana										Totals*	
	0 Nights	1 Night	2 Nights	3 Nights	4 Nights	5 Nights	6 Nights	7 Nights	8 - 14 Nights	15 + Nights		
Passing Through	100%	--	--	--	--	--	--	--	--	--	--	100%
Business	99%	--	--	1%	--	--	--	--	--	--	--	100%
Vacation/ Recreation/ Pleasure	84%	1%	1%	1%	2%	5%	2%	3%	1%	--	--	100%
Visit Family/ Friends	99%	--	--	1%	<1%	--	--	--	--	--	--	100%

\*Totals may not equal 100% due to rounding.

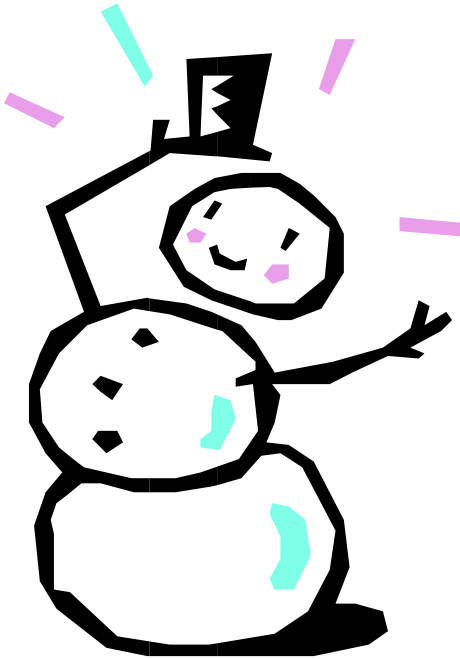
Table 2.10: Number of Nights Spent in a Rented Home/Cabin in Montana by Primary Reasons For Winter Trip to Montana

Primary Reason For Winter Trip to Montana	Number of Nights Spent in a Rented Home/Cabin in Montana										Totals*	
	0 Nights	1 Night	2 Nights	3 Nights	4 Nights	5 Nights	6 Nights	7 Nights	8 - 14 Nights	15 + Nights		
Passing Through	100%	--	--	--	--	--	--	--	--	--	--	100%
Business	99%	--	--	--	--	--	--	--	<1%	1%	--	100%
Vacation/ Recreation/ Pleasure	97%	--	--	1%	1%	1%	--	1%	<1%	--	--	100%
Visit Family/ Friends	95%	1%	--	--	2%	--	1%	--	--	--	1%	100%

\*Totals may not equal 100% due to rounding.

Table 2.11: Property Owners and Former Residents by Primary Reason for Winter Trip to Montana

Primary Reason For Winter Trip to Montana	Visitors Who Currently Own Property in MT	Visitors Who Have Lived in MT Before This Trip
Passing Through	1%	12%
Business	9%	20%
Vacation/ Recreation/ Pleasure	8%	17%
Visit Family/ Friends	8%	49%



## *First Time vs. Repeat Winter Visitors*

About 90 percent of winter travel groups in each category had visited Montana in the past 10 years. While business travelers and those visiting family/friends made trips to the state more frequently over the last decade than vacationers or those passing through, it's interesting to note that winter business travelers explored Montana in every season, but most often in the winter. Those visiting family/friends were inclined to visit in the summer more often than in the winter (Table 2.12).

Table 2.12: Visits to Montana in Past 10 Years and Season of Those Visits by Primary Reasons For Trip to Montana

Primary Reason for Winter Trip to Montana	Percent Repeat Visitors	Number of Visits to Montana in Past 10 Years						Season of Visits in Past 10 Years**			
		0	1 - 10	11 - 20	21 - 30	31+	Total*	Spring	Summer	Fall	Winter
Passing Through	95%	2%	55%	17%	7%	19%	100%	55%	74%	57%	80%
Business	92%	3%	38%	8%	12%	39%	100%	75%	82%	77%	92%
Vacation/ Recreation/ Pleasure	89%	1%	60%	20%	4%	15%	100%	42%	66%	50%	91%
Visit Family/ Friends	92%	--	40%	21%	7%	32%	100%	73%	93%	73%	84%

\*Percent total may not equal 100% due to rounding.

\*\*Percent totals are more than 100% because visitor groups could have visited in more than one season during the past 10 years.

## *Flexibility of Winter Travel Plans and Pre-Trip Planning*

Visitor groups were asked how flexible their travel plans were on their trip. Those in Montana on business were more likely to be structured in their travel plans compared to groups with other primary reasons for visiting the state. Fifty-five percent of those parties on business trips had all the places they wanted to visit planned in advance. Thirty-three percent of those visitor groups who were passing through the state had very flexible plans and didn't have any definite places in mind they wanted to visit (Table 2.13).

Table 2.13: Flexibility of Winter Travel Plans by Primary Reasons For Trip to Montana

Primary Reason for Winter Trip to Montana	Group's Flexibility of Travel Plans					Total*
	All places I want to visit have been planned in advance	Most places I want to visit have been planned, but I might take a few unplanned stops	Some places I want to visit have been planned, but my plans are fairly flexible	I only have a few definite places in mind I want to visit, so my plans are quite flexible	I don't have any definite places in mind I want to visit, so my plans are very flexible	
Passing Through	36%	17%	6%	9%	33%	100%
Business	55%	20%	9%	5%	11%	100%
Vacation/ Recreation/ Pleasure	24%	26%	20%	19%	11%	100%
Visit Family/ Friends	20%	24%	12%	22%	22%	100%

\*Totals may not equal 100% due to rounding.



## *Information Sources Used by Winter Travel Groups*

Nonresident winter travel parties indicated which sources were used to gather information for their trip prior to arriving in Montana and, of those sources, which one was most useful to them. A list of 11 information sources were included in the questionnaire. Those visitor groups in Montana primarily for vacation/recreation/pleasure or passing through the state were more likely to use some type of information source than those groups who were in the state primarily to visit family or friends or for business. Those passing through used an automobile guide such as AAA more often than other groups and business travel groups were the primary users of travel agency services. Many travel groups utilized "other" sources of information prior to their trip to Montana (Table 2.14).

Table 2.14: Information Sources Used For Trip Prior to Visit in Montana by Primary Reason For Winter Trip to Montana

<b>Primary Reason for Winter Trip to Montana</b>	<b>% Who Used an Information Source</b>	<b>Primary/Most Useful Source Used (if one was used)</b>
<b>Passing Through</b>	53%	Automobile Club (such as AAA)
<b>Business</b>	43%	Travel Agency
<b>Vacation/ Recreation/ Pleasure</b>	56%	Other Source**
<b>Visit Family/ Friends</b>	45%	Other Source**

\*\* See Appendix A for written responses.





## Winter Activity Participation

Winter travel groups indicated what activities they participated in while on this trip to Montana. The top five activities for these groups are presented in text.

Recreational shopping and wildlife watching were popular activities among travel groups in all four categories. Visiting family/friends and gambling were also fairly popular among the groups. Visitor groups passing through the state engaged in snow-related activities much less frequently than shopping, gambling, and watching wildlife. Vacation groups participated in snow activities much more often than business travel groups or those passing through the state. Recreational shopping was still the most popular activity, but downhill skiing and snowmobiling also had high participation rates (Figure 2.6).

### Passing Through

Shopping  
Gambling  
Wildlife Watching  
Visiting Family/Friends  
Visiting Historic/Interp. Sites

### Business

Shopping  
Visiting Family/Friends  
Wildlife Watching  
Gambling  
Swimming in Pools

### Visit Family/Friends

Visiting Family/Friends  
Shopping  
Wildlife Watching  
Gambling  
Downhill Skiing

Figure 2.6: Activity Participation of Vacation/Recreation/Pleasure Travel Groups\*



\*Percent total equals more than 100% because visitor groups could have participated in more than one activity.

## ***1997-98 Winter Visitor Group Expenditures***

Nonresident winter visitor groups traveling in Montana primarily for vacation accounted for over 40 percent (\$99 million) of nonresident visitor spending. These groups made up only 20 percent of all travel groups, but they had the highest average daily expenditure and stayed in the state for over five days.

Business travel groups (21% of all winter travel groups) stayed over four days and spent about \$100 per day in Montana. They accounted for over 20 percent of the total winter expenditures.

Groups visiting family and friends in Montana stayed the longest (about six days), but on average spent less than half as much per day than vacationing groups did. However, they still accounted for almost 20 percent of 1997-98 winter spending. Visitor groups passing through the state made up almost a third of all winter visitor groups, but stayed less time and spent less money per day than many other groups, so accounted for only 10 percent of the expenditures (Table 2.15).

Table 2.15: Average Visitor Group Expenditures by Primary Reason for Winter Trip to Montana

<b>Primary Reason for Winter Trip to Montana</b>	<b>Average Expenditures of Visitor Groups in Montana</b>					<b>% of All Winter Expenditures*</b>
	<b>Percent of Traveler Groups*</b>	<b># of groups</b>	<b>Average Length of Stay (days)</b>	<b>Average Daily Group Expenditures</b>	<b>Total Expenditures</b>	
<b>Passing Through</b>	32%	196,000	1.9	\$64	\$23 million	10%
<b>Business</b>	21%	127,000	4.4	\$101	\$56 million	23%
<b>Vacation/ Recreation/ Pleasure</b>	20%	124,000	5.4	\$146	\$99 million	41%
<b>Visit Family/ Friends</b>	18%	111,000	6.1	\$68	\$46 million	19%

\*Percent totals may not equal 100% because this represents the top four travel group types only.

Spending patterns varied among winter travel group types, but it is interesting to compare expenditures in different sectors. Vacationers and business travelers tended to spend a larger share of their money on lodging than groups visiting family and friends or passing through. Pass-through visitors spent a substantial portion (42%) of their money on gasoline and oil. Each group type spent at least 18 percent of their money in restaurants and bars and at least 14 percent on retail goods (Table 2.16).

Table 2.16: Distribution by Sector of Visitor Group Expenditures in Montana by Primary Reason for Trip to Montana

Primary Reason for Trip	Distribution by Sector of Visitor Group Expenditures in Montana*																					Total Avg.** Daily Expend
	Lodging: Hotel, B&B, Camp, RV			Auto rental, repair, & transportation fares			Gasoline, oil			Restaurant, bar			Groceries, snacks			Retail sales			Services			
	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	
Passing Through	\$9	\$3	15%	\$1	<\$1	2%	\$27	\$10	<b>42%</b>	\$12	\$4	18%	\$3	\$1	5%	\$11	\$4	17%	\$1	<\$1	1%	\$64
Business	\$26	\$14	25%	\$6	\$3	6%	\$16	\$9	16%	\$26	\$14	<b>26%</b>	\$4	\$2	4%	\$17	\$9	16%	\$8	\$4	8%	\$101
Vacation	\$34	\$23	23%	\$5	\$3	3%	\$22	\$15	15%	\$39	\$26	<b>27%</b>	\$6	\$4	4%	\$20	\$14	14%	\$19	\$13	13%	\$146
Visit Family/Friends	\$8	\$6	12%	\$1	\$1	1%	\$14	\$10	21%	\$15	\$10	22%	\$5	\$4	8%	\$17	\$12	<b>25%</b>	\$7	\$5	10%	\$68

\*Represents percent of groups' expenditures made in each sector; percent totals for each group type may not equal 100% due to rounding.

\*\*Dollar amounts may not equal indicated sum due to rounding.

There are a couple of different ways to look at groups' average daily expenditures. In order to calculate total winter expenditures for each purpose of trip category, the average expenditures for *all* groups within each category, including groups that did *not* spend money, were calculated. These amounts were used in conjunction with the average length of stay for each group type and the total number of groups in each category to calculate total expenditures for the winter season by purpose of trip.

Visitors also provided information about *how* they spent their money, which were used to show how expenditures were distributed across various sectors of the economy. On a per group, daily basis these figures might seem somewhat low (Table 2.16). This is because they reflect all groups, *including* those who either spent very little money or did not spend money in the state. These figures were needed to understand the total expenditure profile, but are less useful when trying to understand actual spending habits for those who *did* spend money. These habits become clear when visitor spending is analyzed for *only* the visitor groups who spent money in the state (Table 2.17).

Of those winter visitor groups spending money in Montana, those on vacation typical spent more for lodging, auto rental/repair/transportation, and restaurants and bars than other winter visitor groups. On average, business travel groups spent more money on retail goods and services than other groups.

Table 2.17 shows how much a group tended to spend *if* it had an expenditure in a particular sector, while table 2.16 shows *overall* expenditures based on the spending habits of *all* groups.

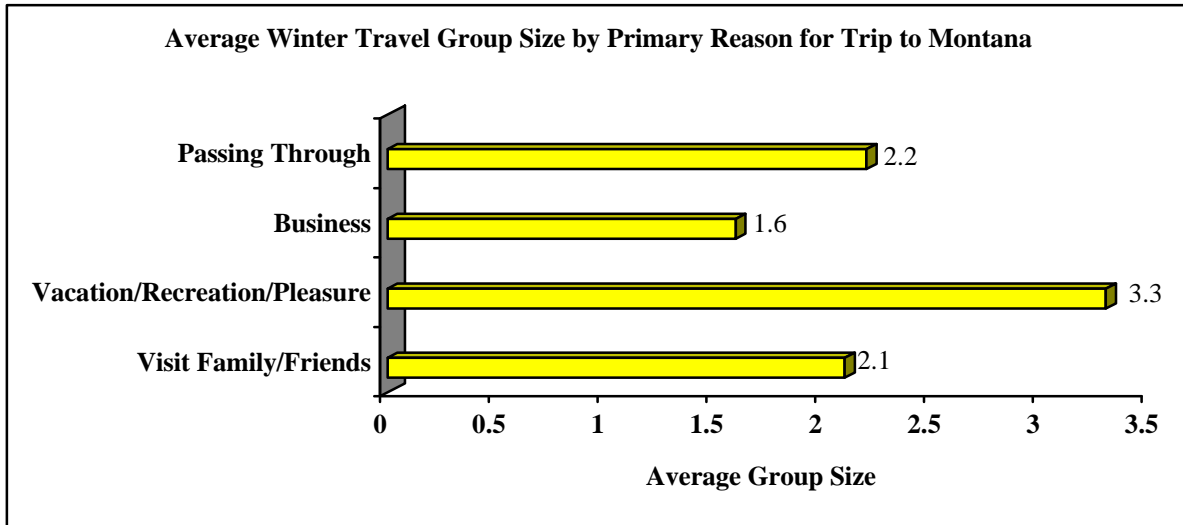
Table 2.17: Distribution by Sector of Visitor Groups *Who Spent Money* in Montana by Primary Reason for Trip to Montana

Primary Reason for Trip	Distribution by Sector of Visitor Groups <i>Who Spent Money</i> in Montana by Primary Reason for Trip						
	Lodging: Hotel, B&B, Camp, RV	Auto rental, repair, transportation fares	Gasoline, oil	Restaurant, bar	Groceries, snacks	Retail Sales	Services
	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.
Passing Through	\$45	\$40	\$32	\$20	\$10	<b>\$62</b>	\$20
Business	\$58	\$52	\$25	\$37	\$15	\$69	<b>\$74</b>
Vacation	\$78	<b>\$93</b>	\$30	\$51	\$18	\$62	\$73
Visit Family/Friends	\$41	\$34	\$23	\$25	\$19	<b>\$52</b>	\$41

## Demographics

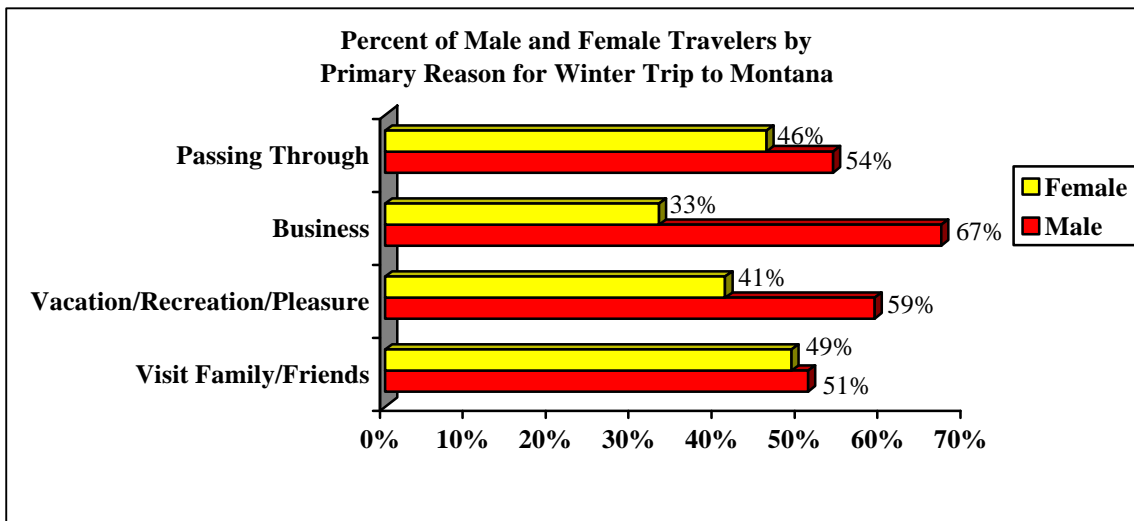
The average travel party size of Montana winter visitor groups ranged from 1.6 to 3.3 people, depending on the type of travel group (Figure 2.7).

Figure 2.7: Average Size of Travel Group by Primary Reason for Winter Trip to Montana



Fewer females than males traveled in each group type. With those passing through the state or visiting family/friends, there was little difference. However, males outnumbered females in the groups on vacation and the number of males were more than twice the number of females in groups traveling for business (Figure 2.8).

Figure 2.8: Percent Males and Females by Primary Reason for Winter Trip to Montana



Travelers between the ages of 30 and 49 represented the most common age class among travelers on business, vacation, or visiting family/friends. This age group was also the top category for those passing through, along with travelers between 50 and 64 years old. The distribution of age ranges of visitors were similar between business travelers and those on vacation, while travel groups visiting family/friends were similar to those passing through the state (Tables 2.18 and 2.19).

Table 2.18: Age of Male Visitors by Primary Reason for Winter Trip to Montana

Primary Reason for Winter Trip to Montana	Age of Male Visitors					Total*
	0 - 17 Years Old	18 - 29 Years Old	30 - 49 Years Old	50 - 64 Years Old	65+ Years Old	
Passing Through	15%	15%	27%	27%	16%	100%
Business	9%	11%	49%	28%	3%	100%
Vacation/ Recreation/ Pleasure	13%	21%	37%	26%	4%	100%
Visit Family/ Friends	19%	18%	31%	20%	12%	100%

\*Percent totals may not equal 100% due to rounding.

Table 2.19: Age of Female Visitors by Primary Reason for Winter Trip to Montana

Primary Reason for Winter Trip to Montana	Age of Female Visitors					Total*
	0 - 17 Years Old	18 - 29 Years Old	30 - 49 Years Old	50 - 64 Years Old	65+ Years Old	
Passing Through	12%	19%	28%	28%	13%	100%
Business	16%	18%	46%	18%	2%	100%
Vacation/ Recreation/ Pleasure	17%	15%	47%	17%	4%	100%
Visit Family/ Friends	17%	19%	26%	23%	15%	100%

\*Percent totals may not equal 100% due to rounding.

States and provinces bordering Montana were well-represented by winter travel groups. Not many travelers came from foreign countries to experience Montana in the winter. Many visitors came from places that possess similar winter climates, so the cold Montana winter didn't drive them away (Table 2.20).

Table 2.20: Travel Party's Residence by Primary Reason for Winter Trip to Montana

Primary Reason for Winter Trip to Montana	Travel Party's Residence									Totals*
	Idaho	Minnesota	North Dakota	Washington	Wyoming	Other US States	Alberta	Other Canadian Provinces	Foreign Countries Excluding Canada	
Passing Through	7%	4%	15%	15%	8%	19%	<b>20%</b>	12%	--	<b>100%</b>
Business	12%	3%	14%	<b>20%</b>	11%	34%	4%	2%	<1%	<b>100%</b>
Vacation/ Recreation/ Pleasure	10%	<b>16%</b>	<b>16%</b>	15%	2%	28%	4%	8%	<1%	<b>100%</b>
Visit Family/ Friends	12%	5%	<b>13%</b>	12%	8%	45%	2%	2%	<1%	<b>100%</b>

\*Totals may not equal 100% due to rounding.

## Section 3

# Winter Travel Party's Residence

This section outlines travel groups from Idaho, Minnesota, North Dakota, Washington, Wyoming, and Alberta, Canada. Each of these areas represented at least 5% of all winter travel groups to Montana. Collectively they represented 64 percent of all winter travel groups to Montana.

The following descriptions highlight statistics about visitor groups based on their area of residence. Table 3.0 at the end of this summary provides data on these groups in a table format for comparison purposes.

### *Executive Summary*

#### **Washington (15% of winter visitor groups):**

- These winter visitor groups generally traveled alone, but many others either traveled as couples or with family.
- Nearly 80 percent of these groups traveled in Montana for one of three reasons: to pass through the state, for business, or for vacation.
- Snowmobiling was the primary attraction to Montana for these groups, but the mountains, open space, and downhill skiing/snowboarding were also high on the list.
- Of those groups that rented automobiles for a portion of their trip, nearly two-thirds rented in Montana.
- The average length of stay for these groups was 4.3 days (3 nights), and their nights were either spent in hotels or private homes.
- 10 percent of these travel groups currently own property in Montana, and one-third had previously lived in Montana.
- Nearly all Washington visitor groups had visited Montana in the past 10 years, and one-fourth had visited an average of three or more times per year over the last 10 years. Also, 96 percent plan to visit again within the next 2 years.
- Over one-half of these travel groups had some flexibility in their travel plans, and 21 percent indicated that their plans were very flexible.
- Less than half used an information source prior to their trip.
- 31 percent of these travel groups did not participate in any recreational activities while in the state. For those that did participate, visiting family and friends, shopping, snowmobiling, wildlife watching, and gambling were the most popular activities.
- These groups spent an average of \$85 per day while in Montana, with over half of those expenditures going to restaurant/bar and gasoline/oil.
- The average group size for Washington groups was 2.1 people, and males were slightly more common in the travel party as females.



**North Dakota** (14% of **winter** visitor groups):

- These winter visitors traveled most frequently with family, but couples and lone travelers were also fairly prevalent.
- Groups passing through the state were most common among visitor groups from North Dakota, but vacationers and business groups represented nearly half of all groups from the state.
- These groups were primarily attracted to Montana for downhill skiing/snowboarding, but, like many other groups, they were also attracted by the mountains, open space, and family/friends.
- Very few visitor groups from North Dakota flew or rented automobiles on their trip.
- These visitor groups stayed an average of 4 days (3 nights) and spent one-half of those nights in hotels with another 20 percent in private homes.
- Over one-third of these groups had previously lived in Montana, and 8 percent currently own property in the state.
- 99 percent of these visitors had been to Montana in the past 10 years and plan to visit again in the next 2 years. Over 40 percent of these repeat visitors visited an average of at least 3 times per year.
- Their plans were fairly flexible, with less than one-third having rigid, pre-planned stops.
- Less than 40 percent of these groups used information sources for pre-trip planning.
- For the 77 percent of North Dakota groups that participated in recreation activities, shopping, visiting family and friends, downhill skiing/snowboarding, attending sporting events, and swimming in pools were the most popular activities.
- North Dakotans spent an average of \$113 per day during their trip, and restaurant/bar, retail items, and gasoline/oil were their top three expenditure categories.
- An average of 2.6 people were present in these travel groups, with males and females nearly equal in representation.

**Idaho** (11% of **winter** visitor groups):

- Visitors from Idaho traveled alone, as couples, or with family more frequently than in any other group.
- Idaho groups were primarily in Montana for business, but vacationers and those visiting family and friends were also very prevalent. Also common were those groups passing through the state.
- Snowmobiling was the primary attraction for Idaho travelers, but the mountains, open space, and family and friends were also high on the list.
- None of these groups flew during their trip, and only one percent rented automobiles.
- Groups from Idaho spent an average of 3.3 days (2 nights) in the state. Their nights were mostly spent in hotels and private homes.
- 98 percent of these groups had visited Montana in the past 10 years, and 90 percent plan to visit again in the next 2 years.
- 60 percent had some flexibility in their travel plans, and of the 35 percent who utilized information sources for pre-trip planning, automobile clubs such as AAA were the most useful source.
- 85 percent of these groups participated in recreational activities while in Montana, and visiting family and friends, shopping, wildlife watching, day hiking, and gambling were the most common activities.
- Groups from Idaho spent an average of \$59 per day in Montana. They accounted for 11 percent of all winter travel groups to the state, but only for 6 percent of all winter expenditures. Their top categories of spending were gasoline/oil, restaurant/bar, and lodging.
- The average group size for Idaho travelers was 2, with males being nearly twice as common as females in the groups.

### **Wyoming (9% of winter visitor groups):**

- Over one-third of the travelers from Wyoming traveled alone, but couples and families each represented an additional one-fourth of the travel groups from the state.
- Groups passing through the state were slightly more common than business travelers, but together these two reasons for traveling in Montana represented more than one-half of all Wyoming travel groups.
- Family and friends were the most common attractions to Montana for Wyoming travel groups, but open space, snowmobiling, and the mountains were also popular.
- One-fourth of all Wyoming travelers flew for a portion of their trip, but over 80 percent of these groups that flew, drove to Billings to board a flight for a destination outside of Montana.
- Wyoming groups spent an average of 3 days (2 nights) in Montana on their trip, with the majority of nights spent in motels.
- Over one-fourth of Wyoming travel groups had previously lived in Montana before the winter of 1997-98, and 7 percent currently own property here.
- 99 percent of Wyoming groups had visited Montana in the past 10 years and plan to visit again in the next 2 years. Over 60 percent of these repeat visitors had made an average of three or more trips to Montana per year in the last decade.
- Almost one-half of the groups from Wyoming had rigid plans for their trip, with another 23 percent having a little flexibility.
- Of the 45 percent of groups who used an information source prior to their trip to Montana, private businesses were the most common resource.
- Over one-fourth of Wyoming travel groups did not participate in recreation activities while in Montana, but shopping, visiting family and friends, attending special events/festivals, wildlife watching, and swimming in pools were common among the 72 percent of groups who did participate.
- Wyoming groups spent an average of \$96 per day in Montana, and retail sales was by far the most common category of spending.
- Wyoming travel groups had an average group size of 2.3, with males and females nearly equally represented.

**Alberta** (9% of **winter** visitor groups):

- Over one-half of the winter travel groups from Alberta traveled as couples, with lone travelers representing the next most common travel group.
- 64 percent of these groups were primarily passing through the state, but vacationers and business groups were the next most common reasons for visiting Montana.
- The mountains were the biggest draw to Montana for Albertans, but open space, downhill skiing/snowboarding, and rivers/lakes were also popular attractions.
- In general, Albertans did not fly during their trips, nor did they rent automobiles.
- These groups spent an average of 2 days (1 night) in the state, and motels were the most common accommodations for these travel groups.
- Only 5 percent of these groups had lived in Montana before this trip, and only 5 percent currently own property in the state.
- Nearly all Albertans had visited Montana in the past 10 years, but most travelers made an average of less than 2 trips per year to the state over the past decade. However, 97 percent plan to visit again in the next 2 years.
- About one-half of the Alberta travel groups had some flexibility in their travel plans, and about one-half had rigid plans.
- 47 percent of these groups used an information source for pre-trip planning, and an automobile club was the most common resource for these groups.
- While 47 percent of Albertan travel groups did not participate in any recreational activities while in Montana, shopping, downhill skiing/snowboarding, gambling, visiting family and friends, and wildlife watching were the most common activities among the remaining 53 percent.
- Albertan travel groups made average daily expenditures of \$54 per day. While they represented 9 percent of all winter travel groups to the state, they only represented 2 percent of all winter expenditures. Gasoline/oil and retail sales were the top two spending categories for these groups, following by restaurant/bar and lodging.
- Albertans had an average travel group size of 2.3 people, with males and females fairly equally represented.

### **Minnesota (6% of winter visitor groups)**

- Groups from Minnesota were most likely to travel with friends, but couples and families were also very common.
- Over one-half of Minnesota travel groups were here for vacation, while groups passing through, visiting family and friends, and business travelers together represented about 40 percent of the groups.
- Minnesotans were primarily attracted to Montana for snowmobiling, but the mountains, open space, and wildlife watching were also big draws for these groups.
- Over one-fourth of these groups flew for a portion of their trip, and of the 14 percent of groups who rented automobiles, those vehicles were rented in Montana.
- Minnesotans spent an average of 5.8 days (4 nights) in the state, with 71 percent of those nights spent in motels.
- While Minnesotans don't currently own property in Montana, 13 percent had previously lived in Montana.
- All groups from Minnesota had visited Montana during the past decade, and 90 percent plan to visit again in the next 2 years. Of those repeat visitors, 77 percent visited no more frequently than once per year over the last 10 years.
- 72 percent of these groups indicated that they did not have rigid travel plans, and 30 percent said some stops were planned, but travel plans were fairly flexible otherwise.
- Two-thirds of the groups from Minnesota used an information source prior to their trip, with "other" information sources being the most common resource.
- 92 percent of Minnesota groups participated in recreational activities while in Montana, with snowmobiling, shopping, wildlife watching, downhill skiing/snowboarding, and visiting family and friends being the most common.
- These groups spent an average of \$142 per day in Montana. They represented only 6 percent of all winter travel groups, but accounted for 12 percent of all winter expenditures. The most common areas of spending were lodging, gasoline/oil, and restaurant/bar.
- An average of 3.3 people were present in Minnesota travel groups, and males were twice as likely to be present as females.

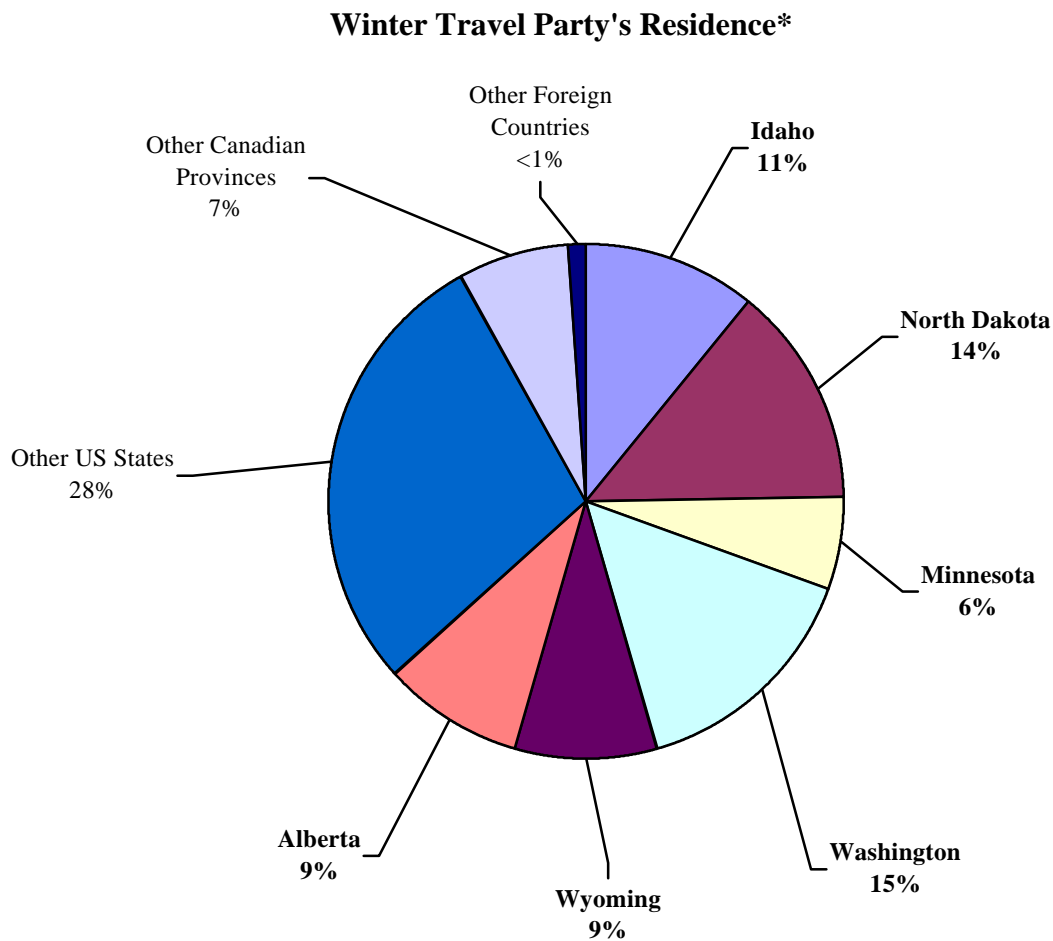
Table 3.0: Comparison Table of All Winter Travel Groups by Those Categorized by Area of Residence

Residence	Washington (15%)	North Dakota (14%)	Idaho (11%)	Wyoming (9%)	Alberta (9%)	Minnesota (6%)	All Travelers
<b>Group Type</b>	Alone: 38% Couple: 25% Family: 19%	Family: 38% Couple: 26% Alone 18%	Alone: 49% Couple: 28% Family: 18%	Alone: 36% Couple: 28% Family: 24%	Couple: 52% Alone: 20% Friends: 12%	Friends: 27% Couple: 25% Family: 22%	Alone: 34% Couple: 29% Family: 21%
<b>Primary Reason for Trip</b>	Pass Through: 29% Business: 28% Vacation: 22%	Pass Through: 30% Vacation: 24% Business: 21%	Business: 25% Vacation: 22% Visit Family/ Friends: 22%	Pass Through: 26% Business: 25% Visit Family/Friends: 16%	Pass Through: 64% Vacation: 11% Business: 10%	Vacation: 57% Pass Through: 18% Visit Family/ Friends 14%	Pass Through: 28% Vacation: 22% Business: 21%
<b>Visitors Who Flew During Trip</b>	12%	5%	--	25%	1%	27%	21%
<b>Rented Automobile During Trip</b>	7%	1%	1%	1%	1%	27%	9%
<b>Average Length of Stay (nights)</b>	3	3	2	2	1	4	3
<b>Average Daily Expenditure</b>	\$85	\$113	\$59	\$96	\$54	\$142	\$96
<b>% of All Winter Travel Groups</b>	15%	14%	11%	9%	9%	6%	100%
<b>% of All Winter Expenditures</b>	14%	15%	6%	6%	2%	12%	100%
<b>Total Expenditures (millions)</b>	\$33	\$37	\$14	\$15	\$6	\$29	\$240
<b>Top 3 Categories of Spending</b>	Restaurant/bar: 27% Gasoline/Oil: 26% Lodging: 23%	Restaurant/bar: 24% Retail Sales: 22% Gasoline/Oil: 20%	Gasoline/Oil: 37% Restaurant/bar: 25% Lodging: 23%	Retail Sales: 40% Gasoline/Oil: 17% Misc. Services: 17%	Gasoline/Oil: 40% Retail Sales: 22% Restaurant/bar: 17%	Lodging: 24% Gasoline/Oil:23% Restaurant/bar: 22%	Restaurant/bar: 23% Gasoline/oil: 21% Lodging: 20%
<b>Ages of Male Visitors</b>	30 - 49: 36% 50 - 64: 29%	30 - 49: 37% 0 - 17: 25%	50 - 64: 34% 30 - 49: 32%	30 - 49: 35% 50 - 64: 24%	50 - 64: 31% 65+: 24%	30 - 49: 32% 18 - 29: 26%	30 - 49: 35% 50 - 64: 26%
<b>Ages of Female Visitors</b>	30 - 49: 39% 50 - 64: 21%	30 - 49: 47% 0 - 17: 21%	30 - 49: 33% 50 - 64: 26%	30 - 49: 24% 0 - 17: 24%	50 - 64: 34% 30 - 49: 22%	30 - 49: 33% 18 - 29: 29%	30 - 49: 36% 50 - 64: 24%

## Winter Travel Party's Residence

Travel groups to Montana were categorized according to where they resided. Visitor groups to Montana from Idaho, North Dakota, Minnesota, Washington, Wyoming, and Alberta represented 63 percent of all winter travel groups to Montana. Collectively, Canadians represented 16 percent of all travel groups to Montana and US citizens represented 83 percent of all winter travel groups (Figure 3.1).

Figure 3.1: Winter Travel Party's Residence



\*Total may not equal 100% due to rounding.

## Winter Travel Group Characteristics

Winter visitor groups from Washington (38%), Idaho (49%), and Wyoming (36%) generally traveled to Montana alone while Albertans (52%) traveled as couples, North Dakotans (38%) traveled with family, and Minnesotans traveled with friends (27%) or as a couple (25%). (Table 3.1).

Table 3.1: Travel Group Type by Winter Travel Party's Residence

Winter Travel Party's Residence	Travel Group Type							Totals*
	Travel Alone	Travel as a Couple	Travel With Family	Travel With Friends	Travel With Family & Friends	Travel With Business Assoc.	Travel With Group or Club	
<b>Washington</b>	<b>38%</b>	25%	19%	11%	2%	6%	1%	<b>100%</b>
<b>North Dakota</b>	18%	26%	<b>38%</b>	5%	11%	3%	--	<b>100%</b>
<b>Idaho</b>	<b>49%</b>	28%	18%	--	4%	1%	--	<b>100%</b>
<b>Wyoming</b>	<b>36%</b>	28%	24%	7%	3%	2%	--	<b>100%</b>
<b>Alberta</b>	20%	<b>52%</b>	11%	12%	3%	2%	--	<b>100%</b>
<b>Minnesota</b>	13%	25%	22%	<b>27%</b>	10%	1%	1%	<b>100%</b>

\*Totals may not equal 100% due to rounding.





## *Purposes of Winter Trips to Montana*

Winter nonresident travel parties were asked to specify all reasons for traveling to Montana. Most travel groups were traveling for vacation/recreation/pleasure in addition to other reasons. Other popular purposes of trip included passing through the state, visiting family and friends, and business. (Table 3.2).

After indicating all reasons for traveling in Montana, winter visitor groups chose their *primary* reason for visiting the state. Groups from Washington (29%), North Dakota (30%), Wyoming (26%), and Alberta (64%) were primarily passing through Montana. Idahoans were in the state on business (25%) while Minnesotans were on vacation (57%). (Table 3.3).

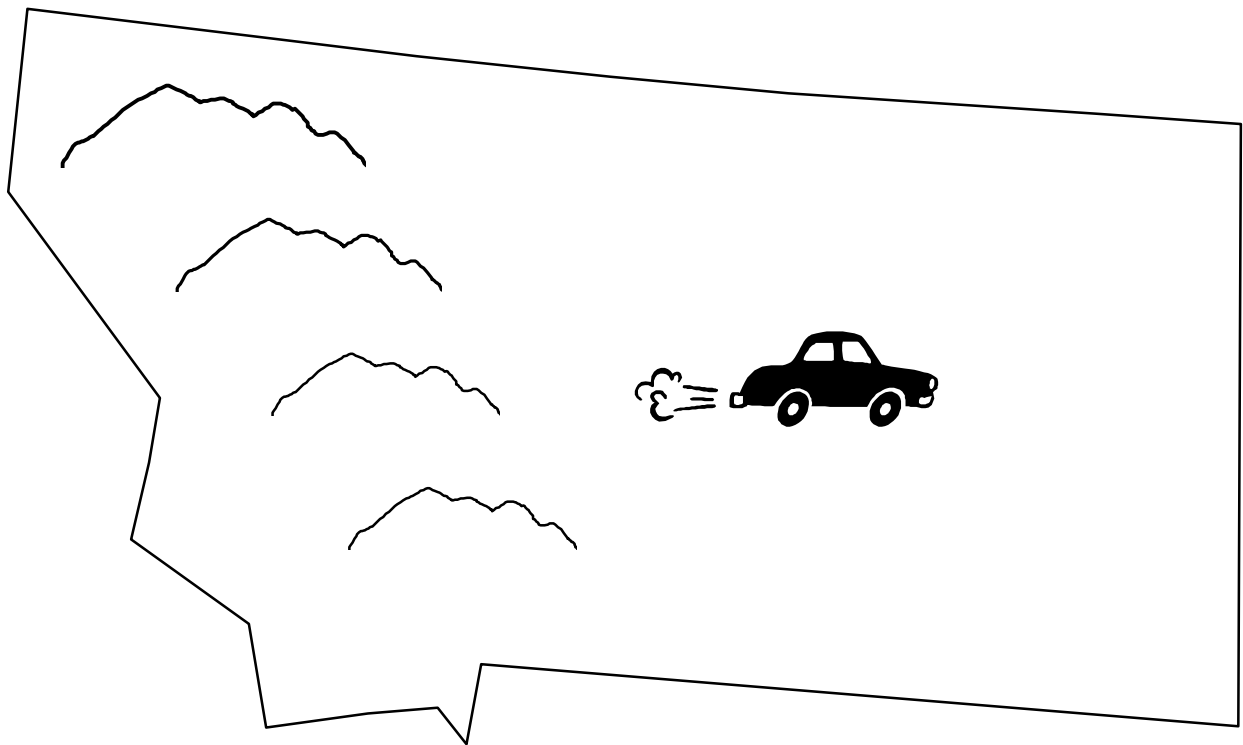


Table 3.2: All Reasons For Winter Trip to Montana by Winter Travel Party's Residence

Winter Travel Party's Residence	All Reasons For Trip to Montana*							
	Vacation/ Recreation/ Pleasure	Visit Family/ Friends	Business	Shopping	Attend Convention/ Meeting	Passing Through	Medical	Other Reasons**
Washington	<b>40%</b>	31%	35%	3%	5%	32%	1%	5%
North Dakota	38%	<b>44%</b>	24%	25%	1%	31%	1%	5%
Idaho	<b>42%</b>	32%	36%	15%	6%	28%	2%	7%
Wyoming	24%	24%	<b>34%</b>	20%	12%	33%	16%	4%
Alberta	34%	13%	11%	18%	--	<b>65%</b>	1%	7%
Minnesota	<b>71%</b>	33%	12%	6%	4%	20%	--	1%

\*Rows total more than 100% because visitors could have more than 1 purpose of trip.

\*\*See Appendix A for written responses.

Table 3.3: *Primary* Reason For Winter Trip to Montana by Winter Travel Party's Residence

Winter Travel Party's Residence	Primary Reason For Trip to Montana*							
	Vacation/ Recreation/ Pleasure	Visit Family/ Friends	Business	Shopping	Attend Convention/ Meeting	Passing Through	Medical	Other Reasons**
Washington	22%	14%	28%	--	1%	<b>29%</b>	1%	5%
North Dakota	24%	16%	21%	4%	<1%	<b>30%</b>	--	5%
Idaho	22%	22%	<b>25%</b>	--	5%	19%	1%	7%
Wyoming	5%	16%	25%	11%	5%	<b>26%</b>	9%	4%
Alberta	11%	5%	10%	4%	--	<b>64%</b>	1%	6%
Minnesota	<b>57%</b>	14%	10%	--	--	18%	--	1%

\*Totals may not equal 100% due to rounding.

\*\*See Appendix A for written responses.

## ***Winter Attractions to Montana***

Winter visitor groups who indicated vacation as one reason for their trip to Montana were asked what attracted them to the state. The top four most popular attractions overall are indicated, along with the primary attractions.

Mountains were most often mentioned by travel groups from all locations except for Wyomingites, who were here to visit family and friends (Table 3.4).

When asked to indicate their primary attraction to the state, Washingtonians, Idahoans, and Minnesotans indicated snowmobiling as their primary attraction while North Dakotans were here for downhill skiing/snowboarding, Albertans enjoyed the mountains, and Wyomingites indicated family and friends (Table 3.5).



Table 3.4: All Types of Winter Attractions to Montana by Winter Travel Party's Residence

Winter Travel Party's Residence	Rank of All Types of Attractions to Montana*			
	#1	#2	#3	#4
<b>Washington</b>	Mountains	Open Space	Snowmobiling	Downhill skiing/snowboarding
<b>North Dakota</b>	Mountains	Open Space	Family/Friends	Downhill skiing/snowboarding
<b>Idaho</b>	Mountains	Open Space	Family/Friends	Snowmobiling
<b>Wyoming</b>	Family/Friends	Open Space	Snowmobiling	Mountains
<b>Alberta</b>	Mountains	Open Space	Downhill skiing/snowboarding	Rivers/Lakes
<b>Minnesota</b>	Mountains	Snowmobiling	Open Space	Watching Wildlife

\*Based only on people who were here for vacation. Respondents could select more than one response.

Table 3.5: *Primary* Winter Attraction to Montana by Travel Party's Residence

Winter Travel Party's Residence	Top Primary Attraction to Montana
<b>Washington</b>	Snowmobiling
<b>North Dakota</b>	Downhill Skiing/Snowboarding
<b>Idaho</b>	Snowmobiling
<b>Wyoming</b>	Family/Friends
<b>Alberta</b>	Mountains
<b>Minnesota</b>	Snowmobiling

## *Winter Method of Transportation: Fly vs. Drive*

Minnesotans (27%) and Wyomingites (25%) were more likely than any other group to fly for any portion of their trip. While it seems that groups from Wyoming flew a lot, over 80 percent of the Wyoming travel groups that flew for a portion of their trip drove to Billings to catch a flight out of the region. Recall that 26 percent of groups from Wyoming were primarily passing through Montana, and 25 percent were primarily here on business.

All of the groups from Minnesota who rented cars, did so in Montana, and nearly two-thirds of those from Washington rented them in the state as well (Table 3.6).

Table 3.6: Fly vs. Drive Visitors by Winter Travel Party's Residence

Winter Travel Party's Residence	Visitors Who Flew or Rented Automobiles on Their Trip to Montana			
	Flew for any portion of their trip	Rented an automobile for any portion of their trip	Rented an automobile in Montana*	Rented an automobile outside Montana*
<b>Washington</b>	12%	7%	64%	36%
<b>North Dakota</b>	5%	1%	--	--
<b>Idaho</b>	--	1%	--	--
<b>Wyoming</b>	25%	1%	--	--
<b>Alberta</b>	1%	1%	--	--
<b>Minnesota</b>	27%	14%	100%	--

\*Based on the percent of visitor groups who rented an automobile for any portion of their trip.

## *Nights Spent, Types of Accommodations, & Former Residence for Winter Travel Groups*

Winter visitor groups indicated how many nights they spent in Montana on their trip. Fifty-four percent of the groups from Alberta stayed at least one night on their way through the state, while 66 percent from North Dakota and 81 percent from Wyoming spent at least one night as well. Minnesotans tended to spend the longest time in the state - over 40 percent spent 6 or more nights (Table 3.7).

Groups who stayed at least one night in Montana indicated the number of nights spent in different types of accommodations. With the exception of Alberta, over half of the travel groups from each place of residence stayed one or more nights in a hotel, and a fair number spent at least one night in a private home. (Table 3.8).

At least one-third of all travel groups spent one or more nights in a hotel. If they stayed in a hotel, Idahoans were most likely to spend three nights, unlike the other groups who were most likely to spend one or two nights (Table 3.9). Minnesotans were most likely to stay almost a week in a private home (Table 3.10).

Over one-third of visitor groups from Washington, North Dakota, and Idaho and just under one-third of visitor groups from Wyoming lived in Montana before this trip. Washington groups were the most likely of all groups to own property in Montana (Table 3.11).

Table 3.7: Number of Nights Spent in Montana by Winter Travel Party's Residence

Winter Travel Party's Residence	Number of Nights Spent in Montana										Totals*
	0 Nights	1 Night	2 Nights	3 Nights	4 Nights	5 Nights	6 Nights	7 Nights	8 - 14 Nights	15 + Nights	
Washington	15%	17%	<b>19%</b>	13%	11%	7%	3%	6%	6%	3%	<b>100%</b>
North Dakota	<b>34%</b>	20%	21%	3%	10%	2%	3%	2%	4%	1%	<b>100%</b>
Idaho	19%	22%	15%	<b>26%</b>	10%	1%	5%	--	2%	1%	<b>100%</b>
Wyoming	29%	<b>34%</b>	17%	5%	7%	2%	7%	1%	--	--	<b>100%</b>
Alberta	<b>46%</b>	34%	8%	1%	6%	2%	--	3%	1%	--	<b>100%</b>
Minnesota	3%	<b>16%</b>	<b>16%</b>	9%	8%	9%	15%	11%	14%	--	<b>100%</b>

\*Totals may not equal 100% due to rounding.

Table 3.8: Type of Accommodations Used in Montana by Winter Travel Party's Residence

Winter Travel Party's Residence	Types of Accommodations Percent Who Spent at Least one Night*								
	Hotel/Motel/Bed & Breakfast	Guest Ranch	Resort/Condominium	Rented Home/Cabin	Private Home	Vehicle in Parking Area	Public Land Camping	Private Campground	Other Locations**
Washington	60%	--	2%	1%	24%	2%	--	1%	--
North Dakota	50%	1%	5%	--	20%	1%	--	--	--
Idaho	54%	--	1%	1%	26%	2%	--	--	--
Wyoming	56%	--	--	3%	14%	--	--	--	--
Alberta	34%	1%	2%	1%	10%	4%	--	4%	--
Minnesota	71%	1%	9%	--	24%	2%	--	1%	--

\*Rows total more than 100% because not all visitor groups spent a night in Montana.

\*\*See Appendix A for written responses.

Table 3.9: Number of Nights Spent in a Hotel/Motel/Bed & Breakfast in Montana by Winter Travel Party's Residence

Winter Travel Party's Residence	Number of Nights Spent in a Hotel/Motel/Bed & Breakfast in Montana										Totals*
	0 Nights	1 Night	2 Nights	3 Nights	4 Nights	5 Nights	6 Nights	7 Nights	8 - 14 Nights	15 + Nights	
Washington	40%	15%	17%	8%	11%	4%	2%	2%	2%	--	100%
North Dakota	50%	27%	10%	1%	7%	1%	1%	2%	1%	--	100%
Idaho	46%	12%	8%	22%	8%	--	5%	--	--	--	100%
Wyoming	44%	34%	14%	3%	1%	--	4%	1%	--	--	100%
Alberta	66%	26%	6%	1%	--	1%	1%	--	--	--	100%
Minnesota	29%	20%	12%	7%	6%	9%	7%	3%	6%	--	100%

\*Totals may not equal 100% due to rounding.

Table 3.10: Number of Nights Spent in a Private Home by Winter Travel Party's Residence

Winter Travel Party's Residence	Number of Nights Spent in a Private Home in Montana										Totals*
	0 Nights	1 Night	2 Nights	3 Nights	4 Nights	5 Nights	6 Nights	7 Nights	8 - 14 Nights	15 + Nights	
Washington	76%	2%	2%	6%	6%	2%	--	3%	1%	3%	100%
North Dakota	80%	8%	6%	2%	1%	1%	1%	--	1%	1%	100%
Idaho	74%	11%	10%	3%	1%	--	--	--	2%	--	100%
Wyoming	86%	2%	3%	--	5%	2%	2%	--	--	--	100%
Alberta	90%	2%	--	1%	5%	1%	--	1%	--	--	100%
Minnesota	76%	--	4%	5%	--	3%	7%	1%	3%	--	100%

\*Totals may not equal 100% due to rounding.

Table 3.11: Property Owners and Former Residents by Winter Travel Party's Residence

Winter Travel Party's Residence	Visitors Who Currently Own Property in MT	Visitors Who Have Lived in MT Before This Trip
Washington	10%	34%
North Dakota	8%	34%
Idaho	7%	38%
Wyoming	7%	27%
Alberta	5%	5%
Minnesota	--	13%



## *First Time vs. Repeat Winter Visitor Groups*

Overall, more than 90 percent of winter visitor groups to Montana had previously visited the state. When categorizing visitor groups by state, substantial numbers of groups from North Dakota, Idaho, and Wyoming visited over 30 times in the past 10 years. Minnesotans have been to Montana the fewest number of times. With the exception of Minnesotans' less frequent spring and fall trips, visits to Montana have been evenly distributed across all seasons among the visitor groups (Table 3.12).

Table 3.12: Prior Trips to Montana by Winter Travel Party's Residence

Winter Travel Party's Residence	Number of Trips to Montana in Past 10 Years						Season of MT Visits in Past 10 Years			
	0	1 - 10	11 - 20	21 - 30	31+	Total*	Spring	Summer	Fall	Winter
<b>Washington</b>	--	<b>54%</b>	14%	7%	25%	<b>100%</b>	61%	77%	64%	87%
<b>North Dakota</b>	1%	31%	15%	12%	<b>41%</b>	<b>100%</b>	69%	84%	83%	86%
<b>Idaho</b>	2%	28%	22%	12%	<b>36%</b>	<b>100%</b>	80%	97%	89%	87%
<b>Wyoming</b>	1%	21%	7%	9%	<b>61%</b>	<b>100%</b>	87%	86%	80%	94%
<b>Alberta</b>	1%	<b>41%</b>	21%	6%	31%	<b>100%</b>	67%	73%	64%	86%
<b>Minnesota</b>	--	<b>77%</b>	18%	3%	3%	<b>100%</b>	24%	62%	37%	92%

\*Percent total may not equal 100% due to rounding.

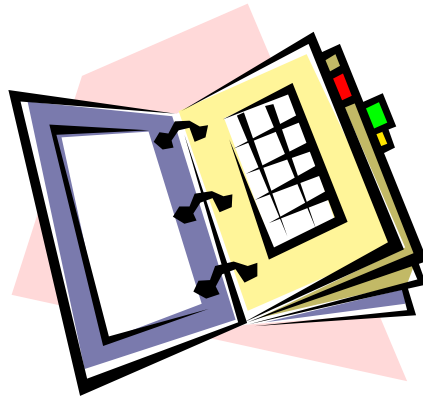
## *Flexibility of Winter Travel Plans and Pre-Trip Planning*

Winter visitor groups were asked how flexible their travel plans were on their trip to Montana. Most Washingtonians were either inflexible or very flexible. North Dakota, Idaho, Wyoming, and Alberta travel groups were mostly inflexible, but Minnesota groups were somewhat flexible (Table 3.13).

Table 3.13: Flexibility of Winter Travel Plans by Travel Party's Residence

Winter Travel Party's Residence	Group's Flexibility of Travel Plans					Totals*
	All places I want to visit have been planned in advance	Most places I want to visit have been planned, but I might take a few unplanned stops	Some places I want to visit have been planned, but my plans are fairly flexible	I only have a few definite places in mind I want to visit, so my plans are quite flexible	I don't have any definite places in mind I want to visit, so my plans are very flexible	
Washington	39%	19%	8%	12%	21%	100%
North Dakota	28%	34%	9%	17%	12%	100%
Idaho	40%	30%	7%	7%	16%	100%
Wyoming	42%	23%	11%	11%	13%	100%
Alberta	42%	13%	17%	11%	17%	100%
Minnesota	28%	17%	30%	10%	15%	100%

\*Totals may not equal 100% due to rounding.



## *Information Sources Used by Winter Visitor Groups to Montana*

Nonresident travel parties indicated which sources were used to gather information for their trip prior to arriving in Montana and, of those sources, which was the most useful to them. A list of 11 information sources was included in the questionnaire. Except Minnesota groups, less than half of all travel parties from the 6 states/provinces used an information source prior to arriving in MT. This is may be because most of the winter travel groups were repeat visitors and didn't need information. If a source was used, groups from Washington, Idaho, and Alberta found automobile clubs like AAA most useful while Wyomingites used information from private business and North Dakotans and Minnesotans used “other” sources (Table3.14).

Table 3.14: Information Sources Used for Trip Prior to Visit by Winter Travel Party's Residence

<b>Winter Travel Party's Residence</b>	<b>% Who Used An Information Source</b>	<b>Primary/Most Useful Source Used (if one was used)</b>
<b>Washington</b>	47%	Auto Club (like AAA)
<b>North Dakota</b>	38%	Other Sources*
<b>Idaho</b>	34%	Auto Club (like AAA)
<b>Wyoming</b>	45%	Info from Private Business
<b>Alberta</b>	47%	Auto Club (like AAA)
<b>Minnesota</b>	67%	Other Sources*

\*See Appendix A for written responses.



## Winter Activity Participation by State

Winter travel groups indicated what activities they participated in while on their trip to Montana. The two most popular activities for parties from Washington, North Dakota, Idaho, and Wyoming were recreational shopping and visiting family and friends. While Albertans and Minnesotans also shopped, Albertans downhill skied/snowboarded while Minnesotans snowmobiled (Figures 3.2).

Figure 3.2: Top Five Activities In Order of Popularity by Winter Travel Party's Residence

### Washington

Visiting Family & Friends  
 Recreational Shopping  
 Snowmobiling  
 Wildlife Watching  
 Gambling



### North Dakota

Recreational Shopping  
 Visiting Family & Friends  
 Downhill Skiing/Snowboarding  
 Sporting Event  
 Swimming in a Pool



### Idaho

Visiting Family & Friends  
 Recreational Shopping  
 Wildlife Watching  
 Day Hiking  
 Gambling



### Wyoming

Recreational Shopping  
 Visiting Family & Friends  
 Special Event/Festival  
 Wildlife Watching  
 Swimming in a Pool



### Alberta

Recreational Shopping  
 Downhill Skiing/Snowboarding  
 Gambling  
 Visiting Family & Friends  
 Wildlife Watching



### Minnesota

Snowmobiling  
 Recreational Shopping  
 Wildlife Watching  
 Downhill Skiing/Snowboarding  
 Visiting Family & Friends



## 1997-98 Winter Visitor Group Expenditures

Visitor groups from North Dakota spent approximately \$37 million in Montana during the winter 1997-98 season. This is more than groups from any other state and represents 15 percent of the total winter expenditures. Groups from Washington (\$33 million, or 14% of total winter expenditures) and Minnesota (\$29 million, or 12% of total winter expenditures) also spent substantial sums of money in Montana during the winter of 1998-98.

Total expenditures are a function of the number of visitor groups, average daily expenditures, and the number of days groups spent in the state. Although Washington groups represented the largest percentage of all winter visitor groups to the state (92,000, or 15% of all visitor groups), they ranked second in terms of total expenditures. North Dakota groups, who numbered 83,000 and ranked second highest in terms of visitor groups, spent more money each day, on average, and spent about the same time in Montana as Washington groups. Therefore, the total expenditures for North Dakotan groups surpassed those of Washington groups. Minnesotans stayed the longest and spent the most money per day. Although they only made up six percent of all travel groups, they spent 12 percent of the money, or \$29 million. On the other hand, Albertans spent the least per day and stayed the least amount of time. Nine percent of visitor groups were from Alberta, but only two percent of the expenditures were made by Albertans (Table 3.15).

Table 3.15: Average Winter Visitor Group Expenditures by Winter Travel Party's Residence

Winter Travel Party's Residence	Average Expenditures of Visitor Groups in Montana					% of All Winter Expenditures*
	Percent of Traveler Groups*	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	
Washington	15%	92,000	4.3	\$85	\$33 million	14%
North Dakota	14%	83,000	4.0	\$113	\$37 million	15%
Idaho	11%	70,000	3.3	\$59	\$14 million	6%
Wyoming	9%	53,000	3.0	\$96	\$15 million	6%
Alberta	9%	54,000	2.0	\$54	\$6 million	2%
Minnesota	6%	35,000	5.8	\$142	\$29 million	12%

\*Percent totals may not equal 100% because this represents just those traveler groups residing in the above 6 areas.

Groups from each of the states varied in how they spent their money. Idahoans and Albertans each spent more than a third of their money on gasoline. Groups from Washington and North Dakota spent the most amount of their money in restaurants and bars, while groups from Minnesota spent the largest share of their money on lodging. Groups from Wyoming made 40 percent of their expenditures on retail items (Table 3.16).

Table 3.16: Distribution of Visitor Group Expenditures in Montana by Travel Party's Residence

Travel Party's Residence	Distribution by Sector of Visitor Group Expenditures in Montana*																					Total Avg.** Daily Expend
	Lodging: Hotel, B&B, Camp, RV			Auto rental, repair, & transportation fares			Gasoline, oil			Restaurant, bar			Groceries, snacks			Retail sales			Services			
	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	Avg. Daily Expend.	Total Expend. (mills)	% of Total*	
Washington	\$20	\$8	23%	\$3	\$1	3%	\$22	\$9	26%	<b>\$23</b>	\$9	<b>27%</b>	\$5	\$2	6%	\$9	\$3	11%	\$4	\$2	5%	\$85
North Dakota	\$18	\$6	16%	\$0	\$0	0%	\$22	\$7	20%	<b>\$27</b>	\$9	<b>24%</b>	\$5	\$2	5%	\$25	\$8	22%	\$16	\$5	14%	\$113
Idaho	\$13	\$3	23%	<\$1	<\$1	<\$1	<b>\$22</b>	\$5	<b>37%</b>	\$15	\$3	25%	\$2	<\$1	3%	\$6	\$1	11%	\$1	<\$1	2%	\$59
Wyoming	\$7	\$1	7%	\$0	\$0	0%	\$16	\$3	17%	\$11	\$2	11%	\$8	\$1	8%	<b>\$39</b>	\$6	<b>40%</b>	\$16	\$3	17%	\$96
Alberta	\$7	\$1	13%	\$0	\$0	0%	<b>\$21</b>	\$2	<b>40%</b>	\$9	\$1	17%	\$3	<\$1	5%	\$12	\$1	22%	\$2	<\$1	3%	\$54
Minnesota	\$34	\$7	24%	\$2	<\$1	2%	<b>\$32</b>	\$7	<b>23%</b>	\$31	\$6	22%	\$6	\$1	4%	\$24	\$5	17%	\$12	\$3	9%	\$142

\*Represents percent of groups' expenditures made in each sector; percent totals may not equal 100% due to rounding.

\*\*Dollar amounts may not equal indicated sum due to rounding.

The above tables show the average daily expenditures for groups from each area of residence. However, these averages may seem somewhat low. This is because they reflect *all* groups, including those who either spent very little money or spent no money in Montana. These averages are important for understanding the total expenditure profile, but do not lend much to understanding the spending habits for those groups who *did* spend money. These habits become more clear when visitor spending is analyzed for *only* the visitor groups who spent money (Table 3.17). Therefore, table 3.17 shows how much a group tended to spend *if* it made an expenditure in a particular sector, while table 3.16 shows *overall* expenditures based on *all* groups.

Table 3.17: Average Expenditures by Sector of Visitor Groups *Who Spent Money* in Montana by Travel Party's Residence

Travel Party's Residence	Distribution by Sector of Visitor Groups <i>Who Spent Money</i> in Montana by Travel Party's Residence						
	Lodging: Hotel, B&B, Camp, RV	Auto rental, repair, transportation fares	Gasoline, oil	Restaurant, bar	Groceries, snacks	Retail Sales	Services
	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.	Avg. Daily Expend.
Washington	\$58	\$48	\$48	\$34	\$12	\$50	<b>\$61</b>
North Dakota	\$58	\$0	\$25	\$36	\$17	\$71	<b>\$115</b>
Idaho	<b>\$50</b>	\$22	\$26	\$22	\$9	\$30	\$14
Wyoming	\$45	\$0	\$23	\$21	\$19	<b>\$103</b>	\$92
Alberta	\$49	\$0	\$30	\$19	\$14	<b>\$51</b>	\$23
Minnesota	<b>\$80</b>	\$61	\$41	\$50	\$17	\$79	\$65

## Winter Visitor Demographics

Winter travel groups varied in size depending on the place of residence. The largest travel parties (excluding bus groups) were visitors traveling from Minnesota, followed by North Dakota (Figure 3.2).

In Minnesota, Idaho, and Washington groups, males outnumbered females by at least 18 percent. North Dakota, Alberta, and Wyoming groups were much more equally divided than the other groups (Figure 3.3).

In general, most travelers were 30-49 years old. Albertans tended to be slightly older (50+) while Wyoming females were younger. Visitors over 65 did not tend to visit Montana in the winter except those from Alberta (Tables 3.18 and 3.19).

Figure 3.3: Average Size of Travel Groups by Winter Travel Party's Residence

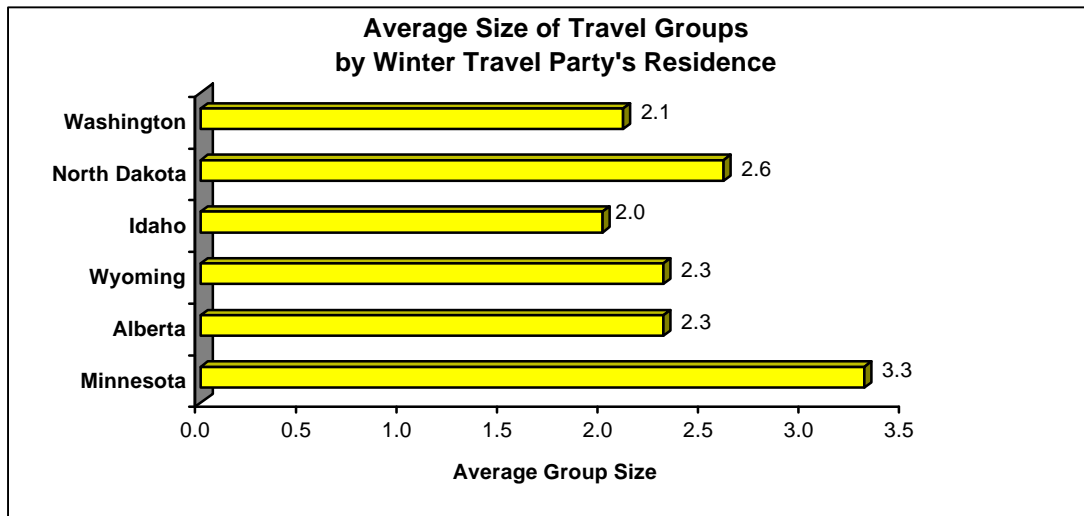


Figure 3.4: Percentage of Males and Females in Winter Travel Groups by Residence

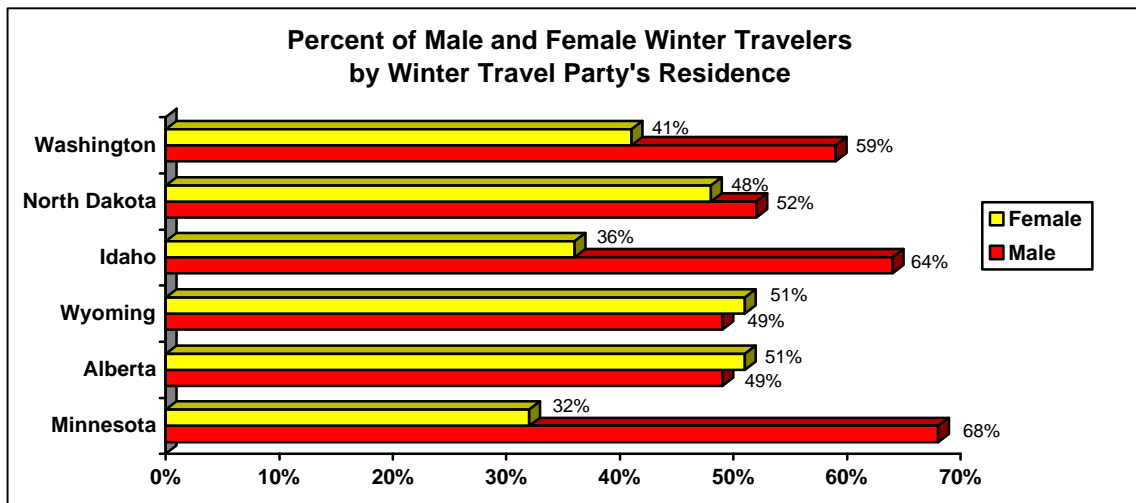




Table 3.18: Age of Male Visitors by Winter Travel Party's Residence

Winter Travel Party's Residence	Age of Male Visitors					Totals*
	0 - 17 Years Old	18 - 29 Years Old	30 - 49 Years Old	50 - 64 Years Old	65+ Years Old	
<b>Washington</b>	11%	16%	<b>36%</b>	29%	8%	<b>100%</b>
<b>North Dakota</b>	25%	13%	<b>37%</b>	17%	9%	<b>100%</b>
<b>Idaho</b>	11%	15%	32%	<b>34%</b>	7%	<b>100%</b>
<b>Wyoming</b>	20%	13%	<b>35%</b>	24%	8%	<b>100%</b>
<b>Alberta</b>	12%	15%	18%	<b>31%</b>	24%	<b>100%</b>
<b>Minnesota</b>	14%	26%	<b>32%</b>	20%	8%	

\*Totals may not equal 100% due to rounding.

Table 3.19: Age of Female Visitors by Winter Travel Party's Residence

Travel Party's Residence	Age of Female Visitors					Totals*
	0 - 17 Years Old	18 - 29 Years Old	30 - 49 Years Old	50 - 64 Years Old	65+ Years Old	
<b>Washington</b>	15%	17%	<b>39%</b>	21%	9%	<b>100%</b>
<b>North Dakota</b>	21%	9%	<b>47%</b>	17%	6%	<b>100%</b>
<b>Idaho</b>	16%	15%	<b>33%</b>	26%	10%	<b>100%</b>
<b>Wyoming</b>	<b>24%</b>	23%	<b>24%</b>	22%	6%	<b>100%</b>
<b>Alberta</b>	7%	20%	22%	<b>34%</b>	17%	<b>100%</b>
<b>Minnesota</b>	12%	29%	<b>33%</b>	18%	8%	

\*Totals may not equal 100% due to rounding.

# Section 4

## Winter Travel Marketing

This section outlines some of the possible winter marketing strategies that can be concluded from the winter nonresident travel study. It addresses six specific markets, as well as the sales tax issue, including:

- Vacation Market
- Pass-Through Market
- Business Market
- Visiting Family/Friends Market
- Geographic Markets
- Former Resident Market
- Sales Tax Issue

### *Vacation Market*

In terms of winter tourism promotion to Montana, it is interesting to note that only one-fifth were brought here *primarily* for vacation and less than one-half of all winter travelers indicated vacation as *one* reason for being in the state. For the winter of 1997-98, this equates to approximately 260,000 visitor groups who have a reason to look at tourism promotional materials to plan a vacation.

Winter vacationers reside in Minnesota, North Dakota, and Washington more than any other US state, Canadian province, or foreign country. These people already know how to travel on snow-covered roads and will still come to Montana when the snow is flying.

Minnesotans are here to snowmobile and ski. They stay long and spend lots of money, so continued winter promotion to this market is essential. These people likely go home and tell their friends about their fabulous winter vacation in Montana. A presence in Minnesota is important to keep reminding these people about Montana. If the presence is there and we reach a person who hasn't been here before, the potential new visitor will likely ask a friend about his/her trip to Montana.

The Montana presence in Minnesota could be maintained by soliciting writers from Minnesota newspapers to visit the state and write columns about winter in Montana, purchasing newspaper advertising, opening a Montana store in the Mall of America, and television spots. However, it is important that advertisements depict what people do and want while in Montana: snowmobiling with nearby wildlife, people having fun while shopping, and skiing and snowboarding.

## ***Pass-Through Market***

One-third of all visitors (196,000 visitor groups) simply passed through the state. This pass-through group currently spends the least amount of money and time in the state compared to all other groups. This is a group who can and should be aggressively studied in terms of:

- Where they're heading
- Why they simply pass through the state
- Time available to spend in Montana
- How they can be reached ahead of time so they will consider staying in Montana longer
- What their needs are while in Montana

A potential research method to gain this information is to conduct focus groups in areas our pass-through markets originate in, such as Seattle, Spokane or Calgary. Once the research has been conducted, promotional schemes could be designed to market directly to these groups.

Thirty-three percent of the pass-through market is very flexible in where they go and what they do. For this reason, it is imperative that information is available to them while in Montana. Ideally, visitor information centers at Interstate entrances would give these people somewhere to find information before they've set their mind on leaving the state. This method has been used and accepted by states such as Arizona, Michigan, Washington, and Idaho.

In the current absence of visitor centers at the borders, a large information sign should be placed at all entrances indicating the nearest town with travel and recreation information. These signs can be relatively inexpensive yet potentially very powerful.

In addition, the pass-through market has a propensity to use an automobile club for information. Therefore, the state should actively seek ways to develop partnerships with entities such as AAA for promoting Montana. These clubs provide a majority of pass-through visitor groups useful travel information. Montana needs the help of these clubs to encourage people to stop more often in the state.

## ***Business Market***

Like the pass through market, these people need further study in terms of:

- Whether they are interested in staying longer.
- What can be done to encourage them to stay longer and/or bring their family while they do business.
- What types of activities they prefer.
- Whether they'd be interested in coming back for a vacation in Montana.

## ***Visiting Family/Friends Market***

This is a tough market to penetrate because these people are already coming here to visit family and friends. A technique that has been fairly successful at getting these visitors to spend more money is to give discounts to the resident they are visiting. In other words, the resident may pay the full admission price/entrance fee to a museum or attraction the first time they visit during a season or year, but are then given a “season” pass for the remainder of the year or a discount each time they bring a nonresident with them. While this is generally a business decision made by the attraction, more people seem to visit attractions if the resident doesn’t have to continue paying every time someone visits them. For instance, if I took my relatives to the Museum of the Rockies in Bozeman, I would pay full price the first time, but then be given a discount card with my name on it for future trips during the year. If a resident has a choice to go somewhere and pay full price each time or pay half-price, they will certainly choose the latter. In the long run, the business would actually benefit from the increase in traffic since the resident and the visitor are both coming (one paying full and the other paying the discounted rate) rather than neither of them visiting the attraction.

Since this market is tough to penetrate but right there at our fingertips, some focus group studies of residents could also be a useful tool to determine what it is that their family and friends would like to do when they visit. It might be helpful to “brainstorm” with residents on how to get their visitors to enjoy their stay more and, thus, spend more money. It may be that while their company is here the resident doesn’t want to participate in activities that cost money so, therefore, the visitor also doesn’t do anything that requires spending money. Focus groups would be a way to explore what can be done to change that idea.

Lastly, sending “Travel Montana” promotional materials to every household in the state may be helpful, too. If two complimentary copies of the materials were sent to each household, one could be used by the residents' household and one could be sent to the residents' next visitors before they come to Montana. It wouldn’t cost the resident anything, but it would provide information to the visitor. This idea should probably be tested at the local level first (i.e., test this in one community in the state, then track the results before expanding to the whole state).

## ***Geographic Marketing***

In terms of geographic marketing for the winter months, it is recommended that marketing emphasis stays within the region. Any form of promotional materials should be concentrated in North Dakota, Minnesota, Washington, Idaho, and Wyoming. Until the behavior of the pass-through market changes, it would not be wise to concentrate in Alberta.

The winter visitors from these areas are return visitors. Nearly all of them have visited the state in the past ten years and nearly all plan to come again in the next two years. Since we know where they are coming from, it only makes sense to go after the same groups. The challenge is to get them to stay a little longer the next time around.

## ***Former Resident Market***

Nearly half of the travel groups who are here visiting family/friends have lived in Montana before, while 20 percent of the business people have lived here and 17% of those here for vacation have lived here before. In other words, of all the winter travelers, 24 percent or nearly 147,000 winter visitor groups have lived in Montana before. It seems that these are "Montana alumni" who come back to visit. Therefore, keeping track of those moving out of the state so that periodic promotional pieces could be sent to them could be an easy way to capture a good portion of the winter travel groups. These people might then come back more often or spend more time and money when they are in the state. While this may seem "far-fetched," it may be a cost-effective marketing campaign. One avenue for collecting the names of people moving away is through the universities in the state. Nonresident students could be a dynamic source of potential visitors.

## ***Sales Tax Issues***

Until Montana votes in a sales tax, it could be used as a promotional theme. This would encourage the visitor to not only visit, but to shop while they are here. Groups primarily in Montana during the winter for shopping had an average expenditure of \$190 per day. This is the largest average daily expenditure of all groups analyzed in this report! Therefore, it makes sense to encourage more of that type of activity.

## **Appendix A**

### ***"Other" Written Responses***

## **"Other" Purposes of Trip to Montana**

Birthday  
Buying Montana property  
Court  
Funeral  
Job interview/Job search  
Mail gifts/Post Office  
Moving out/Relocation  
Pick up family/friend  
Pick up wrecked car  
Visit college campus  
Wedding

## **"Other" Attractions to Montana**

Fishing  
Friendly people  
Gambling  
Gold Prospecting  
Guest Ranch  
Hiking  
Hot Springs  
Own Property  
Photography  
Recreational activity  
Snow shoeing  
Special Event  
Variety of Landscape  
Wilderness

## **"Other" Types of Accommodations**

Private motel  
Travel trailer  
US Forest Service Cabin

## **"Other" Information Sources Used for Planning Trip**

Family/Friends  
Fish and Wildlife  
Maps/Atlas  
Montana Telephone Association  
Newspaper/Magazine  
Trade Shows  
TV Advertisements

University  
USA Center in Belgium  
Visitor Information

## **"Other" Activities**

Biking  
Camping in Parking Lot  
Dog Sledding  
Golf  
Horseback Riding  
Ice Skating  
Motorcycling  
Movie/Theater  
Photography  
Sightseeing  
Snow Play  
Square dancing  
Target Practice  
Visit taverns/Eating