

Lewis & Clark National Estimation and Awareness Study

Prepared by

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for the Institute for Tourism and Recreation Research

and

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Executive Summary

Objectives

- Determine the level of awareness that exists for the Lewis and Clark Expedition.
- Establish a benchmark of interest in attending the bicentennial celebration to be held in Montana.
- Provide an estimate of the number of potential visitors to Montana for the event.
- Determine profile of potential visitors and where these visitors are most likely to go in the state.

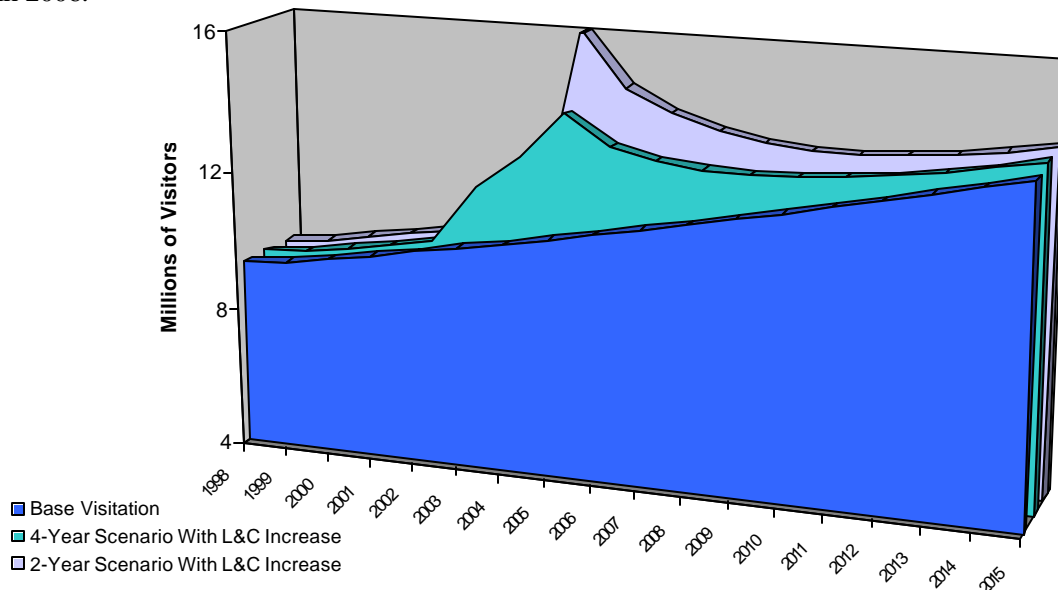
Methodology

The Institute for Tourism and Recreation Research, administrator of the University Travel Research Program, on behalf of Montana's Tourism Advisory Council contracted with Issues & Answers Network, Inc., to conduct a national telephone survey in January 2000. A nationally projectable sampling of the continental U.S. less Montana was interviewed. A total of 2,020 interviews were conducted with adults at least 21 years old. The data were weighted to national gender, race, and age statistics.

Results: Visitor Projections

Montana should expect a total of 8.9 million additional visits for the Lewis & Clark Bicentennial Commemoration in addition to the "base" visitation that would normally be expected. This increase could occur in one of two ways:

1. If all the increase takes place in 2005 and 2006, the anniversary of the Expedition in Montana, visitation levels would be 16.1 million in 2005 and 14.6 million in 2006 given that 60% of the increase occurs during 2005 when the most "adventurous" encounters took place.
2. If all the increase takes place over the years 2003-2006 with 40% in 2003-2004 and 60% in 2005-2006, expectations amount to 11.7 million in 2003, 12.7 in 2004, 14 million in 2005, and 13.2 million in 2006.



While these projections may be hard to grasp when viewed on an annual basis, discussing them in light of the travel season puts them into the perspective. Based on a June 1 through October 31 visitation season with the 4-year projection from above, increases over "base" visitation would be as follows:

<u>Year</u>	<u>Additional Individuals Statewide</u>		<u>Additional Groups Statewide*</u>	
	<u>Total Season</u>	<u>Per Day</u>	<u>Total Season</u>	<u>Per Day</u>
2003	1.4 million	9,150	583 thousand	3,813
2004	2.1 million	14,379	875 thousand	5,991
2005	3.2 million	20,915	1.3 million	8,715
2006	2.1 million	14,379	875 thousand	5,991

* Based on a group size of 2.4 people.

Results: Profile of Lewis & Clark Visitors

- 48% were male and 52% were female, which is nearly identical to the US population.
- 52% had children in the household, compared to only 38% of the US population with children in the household. This suggests that family groups may be common Lewis & Clark travelers.
- 79% were Caucasian, compared with 81% of the US population.
- 18% reside in the Northeast, 44% in the South, 17% in the Mid-West, and 22% in the West. This is compared with US population residences, which are 20% Northeast, 38% South, 20% Mid-West, and 22% West. Southerners appear to be more likely to attend Lewis & Clark Bicentennial events in Montana than groups from other areas.
- Respondents 41-50 years old expressed more interest in visiting Montana for Lewis & Clark Bicentennial events than other groups, with 26% of those very likely to attend falling into this age category compared to 21% of the US population. 20% of those very likely to attend were 21-30 years old, 24% were 31-40 years old, 15% were 51-60 years old, and 15% were 61 years or older.
- Surprisingly, there was no gradient of likelihood exhibited among income levels. Respondents very likely to attend Lewis & Clark Bicentennial events in Montana nearly mirrored the US population in terms of household income, with 20% making \$30,000 or less, 16% with \$30,000 to \$45,000, 13% with \$45,000-\$60,000, 14% with \$60,000-\$90,000, and 13% with more than \$90,000.

Implications

- It is more successful to plan for a managed event than to plan for the unknown. Marketing and infrastructure go hand-in-hand for managing this event successfully. Montana should do all it can to disperse visitation over the years 2003-2006 and throughout the state in order to reduce social and environmental impacts.
- Marketing is the key to dispersion - visitors must be persuaded to come to Montana during all four years and to visit all areas of the state. This will disperse the positive economic impacts while avoiding concentration of negative environmental impacts. Marketing will shape the Lewis & Clark Bicentennial visitation and provide event organizers with a plan for how the Bicentennial will proceed.
- Beef-up infrastructure along the trail, especially in rural Montana, to provide services to additional visitors. This should be done according to the marketing objectives of the state so that services are situated in appropriate areas at appropriate times.

Limitations of the Study

- The anniversary of the Expedition in Montana is still five years away - a lot can happen!
- This is the first Lewis & Clark research to be conducted. Estimates may be revised as more research occurs.

See the full text for more information - downloadable free of charge at www.forestry.umn.edu/itrr.

LEWIS & CLARK NATIONAL ESTIMATION AWARENESS STUDY

Summary of Findings

INTRODUCTION

Montana is planning the commemoration of the 200th anniversary of the Lewis and Clark Expedition for 2005 - 2006. Issues & Answers, a national market research company, was asked to conduct a benchmark study for the Institute for Tourism and Recreation Research at The University of Montana and Montana's Tourism Advisory Council to assess the interest level for The Lewis and Clark Bicentennial Commemoration plan for 2005-6.

The objectives of the study are to:

- Determine the level of awareness that exists for the Lewis and Clark Expedition
- Establish a benchmark of interest in attending the bicentennial celebration to be held in Montana
- Provide an estimate of the number of potential visitors to Montana for the event.
- Determine profile of potential visitors and where these visitors are most likely to go in the state.

METHODOLOGY

A total of 2,020 telephone interviews were conducted in January 2000. The interview averaged 8 minutes in length (a copy of the questionnaire is included in the Appendix of this report).

A nationally projectable sampling of the continental United States was implemented, with the exclusion of residents of Montana. All respondents were adults at least 21 years old. Results are projectable at a 95% confidence level, with an error variance of +/- 2.18%. The data were weighted to national statistics for gender, race and age.

Regions Defined By State

Northeast –	CT	NH	ME	RI	MA	VT			
	NJ	NY	PA						
Midwest –	IN	OH	IL	WI	MI	MO			
	IA	NE	KS	ND	MN	SD			
South --	DE	NC	DC	SC	FL	VA	GA	WV	TX
	MD	AL	MS	KY	TN	AR	OK	LA	
West --	AZ	NV	CO	NM	ID	UT	WY		
	CA	OR	WA						

DETAILED FINDINGS

The respondents in this study are a representative national sample of the United States, with the exclusion of residents of Montana.

Demographic Profile

The following table displays the demographic profile of the respondents who participated in this study. Throughout this report, if there is no significant difference that appears between how respondents of different groups (i.e., male versus female, age, region, etc.) reply to a question, the lack of significance will be noted. The reader can then assume that the profile of respondents fall approximately as they appear in the following table.

DETAILED FINDINGS (Continued)

Demographic Profile - All Respondents

	Sample Size	Percent
Total	2,020	100%
Age		
21-30	386	19.1%
31-40	465	23.0%
41-50	424	21.0%
51-60	283	14.0%
61+	444	22.0%
Gender		
Male	986	48.8%
Female	1034	51.2%
Income		
< \$30	391	19.4%
\$30 < \$45K	319	15.8%
\$45 < \$60K	310	15.3%
\$60 < \$90K	271	13.4%
\$90K +	180	8.9%
Children in Household		
Yes	1229	38.0%
No	769	60.8%
Race		
Caucasian	1642	81.3%
Other	329	16.3%
Region		
Northeast	403	19.9%
South	768	38.0%
Midwest	411	20.3%
West	439	21.7%

DETAILED FINDINGS (Continued)

Past Out-of-State Pleasure Trips

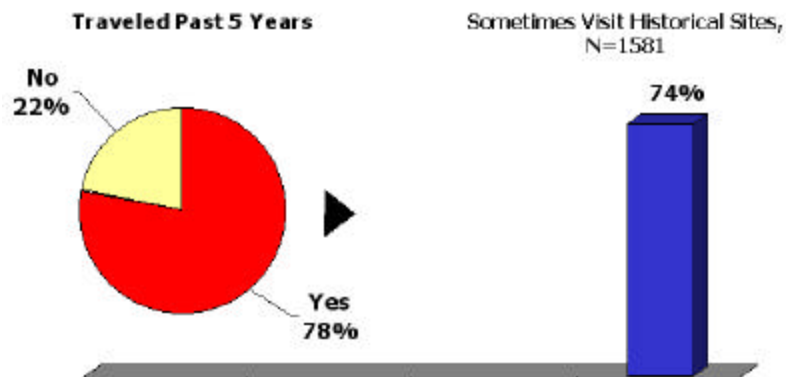
Over three-in-four respondents (78.3%) have taken an out-of-state pleasure trip in the past five years.

In general, this 78.3% is spread proportionately across the demographic profile of all respondents. However, there is a slightly higher occurrence of having taken a pleasure trip in three areas:

- Caucasians -- 84.4% of those taking a trip were Caucasian, higher than the 81.3% total Caucasian respondents.
- Those with no children in the household -- 62.3% of those taking a trip, higher than the 60.8% total households with no children.
- Higher income groups -- Those with higher incomes are more likely to have taken a trip than those with lower incomes.

Visited Historical Sites

The 78.3% of respondents who have taken a pleasure trip in the past 5 years were then asked whether they have visited historical sites or attended historical events when traveling for pleasure. Almost three-quarters (74.0%) stated that they had.



DETAILED FINDINGS (Continued)

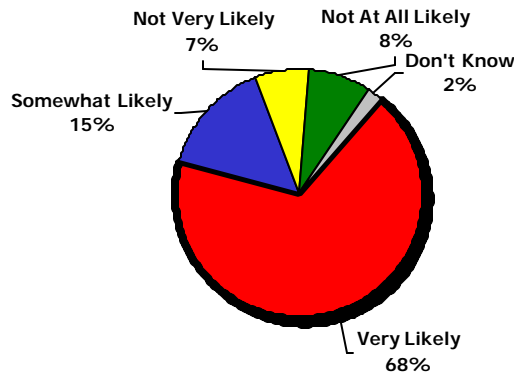
Visited Historical Sites (Continued)

There is a *lower* occurrence of visiting historical sites among those ages 21-30, with this group representing 19.1% of the total population, and only representing 16.0% of those visiting historical sites. Once again, as income increases, so does the likelihood of visiting historical sites:

Income	% of Total Population	% of Those Visiting Historical Sites
<\$30	19.4%	13.6%
\$30 to <\$45K	15.8%	14.8%
\$45 to <\$60K	15.3%	16.3%
\$60 to \$90K	13.4%	15.8%
>\$90K	8.9%	11.3%

Likelihood of Taking a Pleasure Trip in the Future

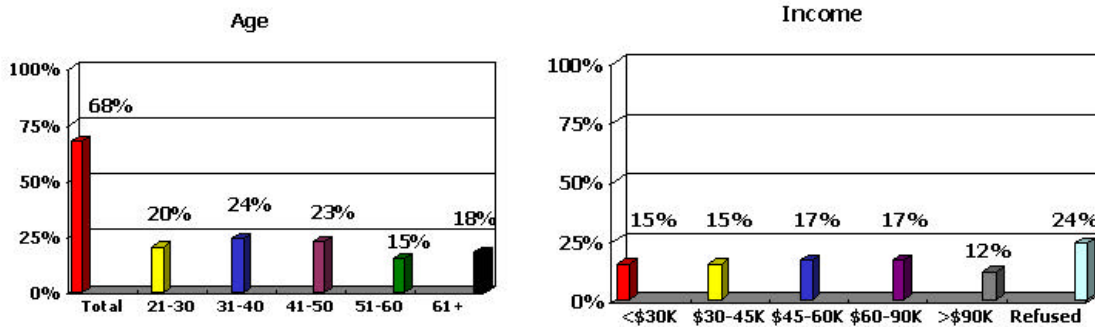
All respondents were asked how likely they were to take a pleasure trip out-of-state in the next 5 years on a scale from 1 (very likely) to 4 (not at all likely). Over two-thirds believe they are "very likely" to take a trip (68.4%), and another 14.7% are "somewhat likely" to take a trip.



DETAILED FINDINGS (Continued)

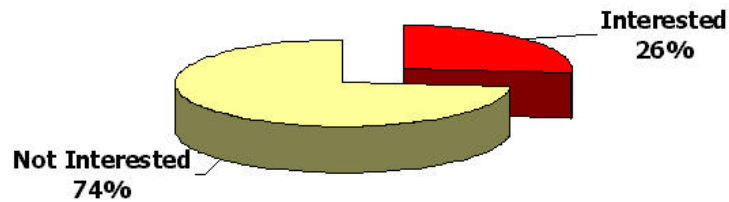
Likelihood of Taking a Pleasure Trip in the Future (Continued)

When looking only at those who are "very likely" to take a trip, 18.8% are age 61+, lower than the total population of 22.0% of age 61+. Higher income levels are also more likely to travel out-of-state in the next 5 years.



Interest in Visiting Montana

All respondents were asked whether they would be interested in visiting Montana (for any reason) in the next 5 years. Slightly over one-fourth (25.9%) would be interested. There is a higher occurrence of males, Caucasians, and those from the Midwest and the West who are interested in visiting Montana than the other demographic groups.



DETAILED FINDINGS (Continued)

Interest in Visiting Montana (Continued)

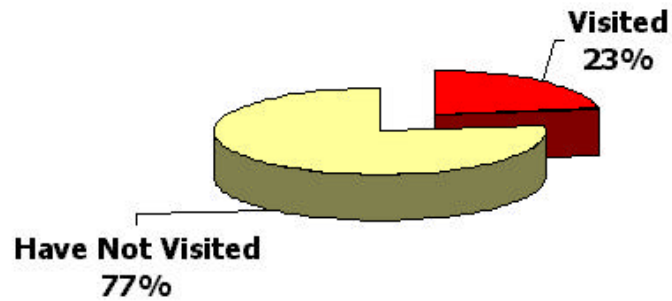
	% of Total Population	% of Those Interested in Visiting Montana
Total	100%	
Age		
21-30	19.1%	18.2%
31-40	23.0%	23.1%
41-50	21.0%	22.4%
51-60	14.0%	17.3%
61+	22.0%	18.2%
Gender		
Male	48.8%	54.1%
Female	51.2%	45.9%
Income		
<\$30	19.4%	17.3%
\$30 < \$45K	15.8%	16.4%
\$45 < \$60K	15.3%	15.2%
\$60 < \$90K	13.4%	15.7%
\$90K +	8.9%	11.3%
Race		
Caucasian	81.3%	87.0%
Other	16.3%	10.9%
Region		
Northeast	19.9%	15.5%
South	38.0%	35.5%
Midwest	20.3%	21.3%
West	21.7%	27.9%

DETAILED FINDINGS (Continued)

Past Visits to Montana

Ever Visited Montana

A total of 23.0% have **ever** visited Montana in the past. Because there is no timeframe associated with this question, the likelihood to have ever visited Montana increases with age.



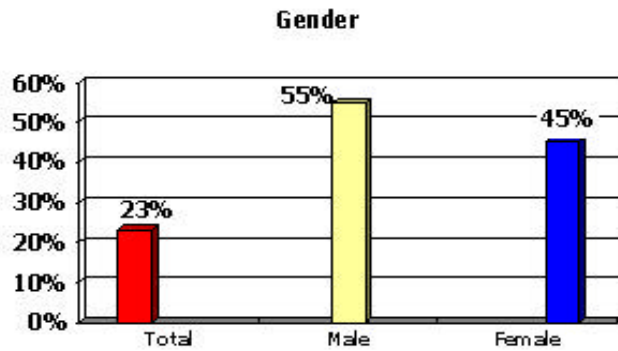
	% of Total Population	% of Those Who Have Ever Visited Montana
Age		
21-30	19.1%	12.6%
31-40	23.0%	17.1%
41-50	21.0%	20.9%
51-60	14.0%	13.7%
61+	22.0%	33.9%

DETAILED FINDINGS (Continued)

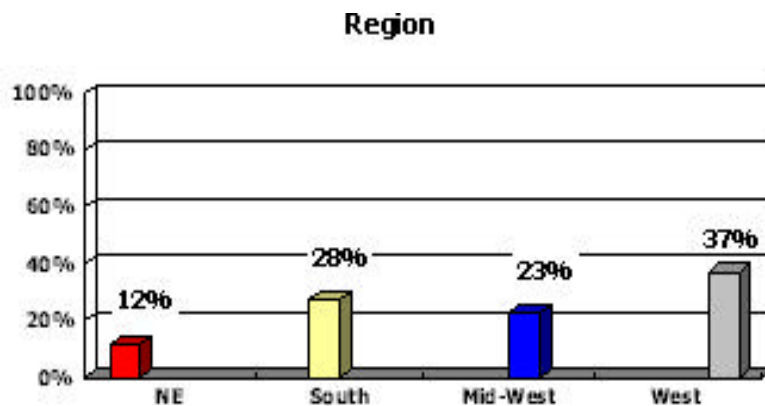
Past Visits to Montana (Continued)

Ever Visited Montana

- Men account for 48.8% of the total population and 55.4% of those having ever visited Montana.



- There is also a much higher concentration of those from the West having visited Montana (36.7% of those having visited are from the West, compared to 21.7% of the total population situated in the West).

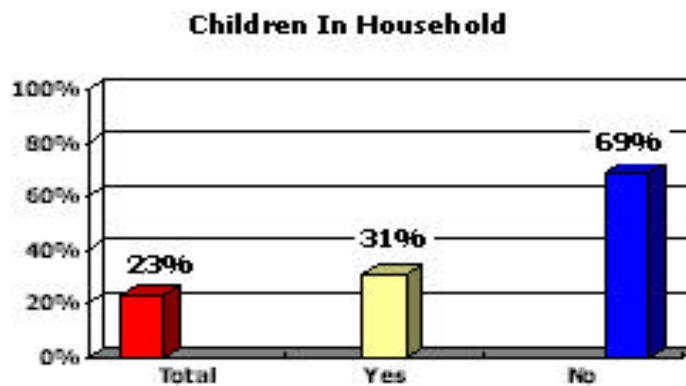


DETAILED FINDINGS (Continued)

Past Visits to Montana (Continued)

Ever Visited Montana

- The percentage of households without children is also higher among those having visited Montana (68.7%) compared to the corresponding occurrence in the overall population (60.8%). This difference is probably a function of the older age skew for this question.

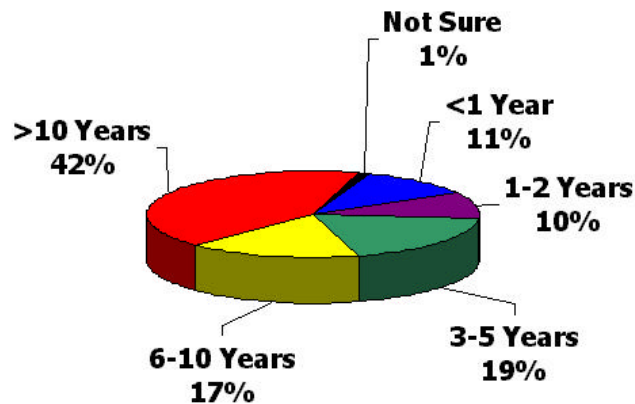


DETAILED FINDINGS (Continued)

Past Visits to Montana (Continued)

Length of Time Since Last Visit

Those respondents who have ever visited Montana were asked how long it had been since their most recent trip. The majority (58.9%) visited Montana six or more years ago. However, a total of 40.1% of those having visited Montana have done so within the past 5 years, which equates to 9.3% of the total population.



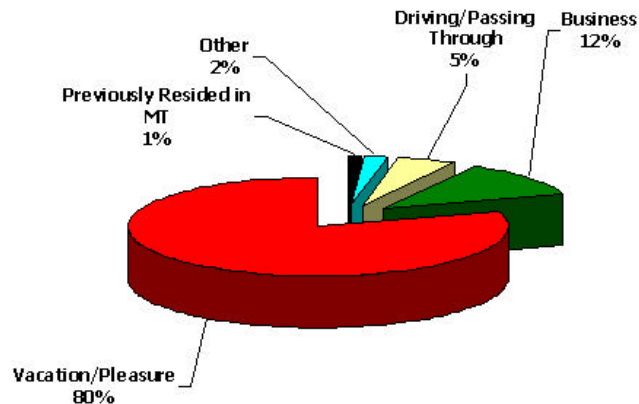
DETAILED FINDINGS (Continued)

Past Visits to Montana (Continued)

Purpose of Trip to Montana (Continued)

The vast majority (80.5%) of those having visited Montana in the past did so for pleasure or vacation. The demographic profile of those respondents visiting Montana for pleasure/vacation purposes mirrors the demographic profile of those ever visiting Montana.

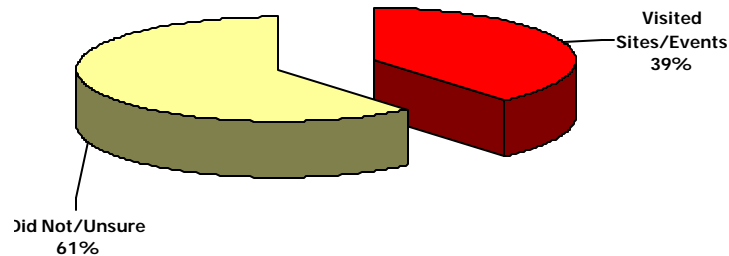
A total of 11.9% visited Montana on business. Among these respondents, males are more likely to have traveled on business (76.2% of business visitors are males, compared to 48.8% males in the total population).



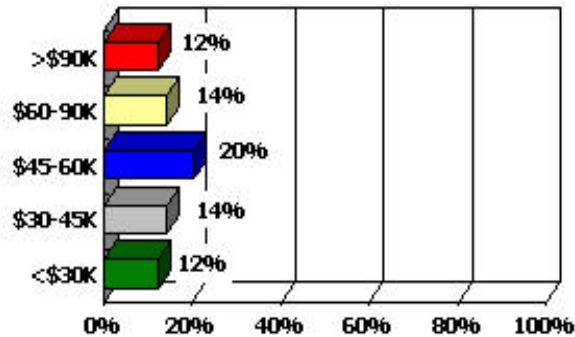
DETAILED FINDINGS (Continued)

Visitation of Historical Sites In Montana

Among only the respondents who have visited Montana, 39.1% visited historical sites in the state, totaling 9.0% of all respondents surveyed. One-half have not visited historical sites in the state (50.6%), and 10.3% are uncertain or cannot remember.



Individuals in higher income brackets have a higher occurrence of having visited historical sites in Montana. Those with incomes of \$60,000 or more represent 22.3% of the total population while representing 26.1% of those visiting historical sites in Montana.



DETAILED FINDINGS (Continued)

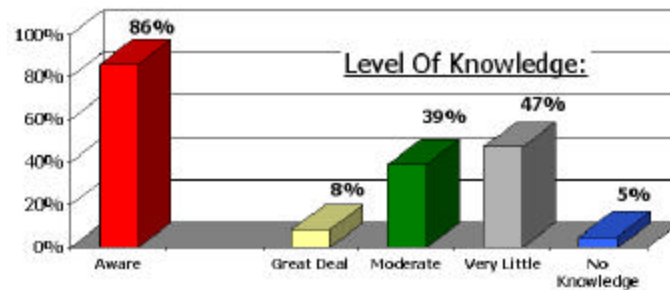
Lewis and Clark Expedition

Knowledge and Awareness

The vast majority of all respondents (85.8%) are aware of either Lewis and Clark or the Lewis and Clark Expedition. The demographic profile of those aware is very similar to the profile of the total population, with the notable exception of race. Caucasians represent 81.3% of the total population, while 85.9% of those aware are Caucasians.

Knowledge

Those respondents aware of Lewis and Clark or the Lewis and Clark Expedition were then asked how much they know about the **original** Lewis and Clark Expedition. The largest segment (47.2%) has very little knowledge, while another 47% indicated either moderate or a great deal of knowledge about Lewis & Clark or the Expedition.



While men account for 48.8% of the total population, 60.8% of those with a great deal of knowledge and 56.3% of those with moderate knowledge are men. Among those respondents with no knowledge, a higher occurrence of minorities occurs (25.9%) compared to the total population, where 16.3% are minorities.

DETAILED FINDINGS (Continued)

Lewis and Clark Expedition (Continued)

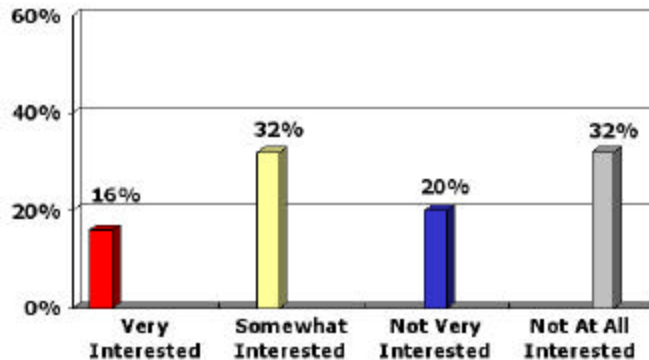
Interest in 200th Anniversary Events

All respondents were read the following paragraph describing the 200th anniversary celebration:

Montana is planning to commemorate the 200th anniversary of the Lewis & Clark Expedition through community and regional events. These events will include festivals, celebrations and guided river trips. Site tours and re-enactments of the Expedition's experiences and encounters with Indian tribes will also be offered at various sites the Expedition was known to use.

Interest in Upcoming Events

After the statement was read, respondents were asked to rate their interest in these types of events on a scale from 1 (very interested) to 4 (not at all interested). Almost one-half (47.8%) indicated they were very or somewhat interested (16.4% and 31.5%, respectively).



DETAILED FINDINGS (Continued)

Lewis and Clark Expedition (Continued)

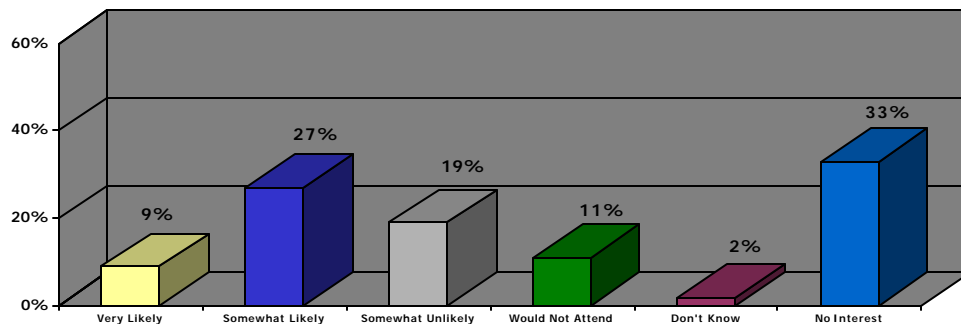
Interest in Upcoming Events (Continued)

Among the 16% indicating they are very interested in Lewis & Clark events in Montana:

- A total of 51.7% are female, compared to 51.2% female in the total population.
- Almost one-half are aged 31-50 (43.2%) compared to the 44.0% who are 31-50 in the total population.
- The West represents 21.7% of those interested equal to the 21.7% from the West in the total population.

Likelihood to Attend 200th Anniversary Events

All respondents were asked their likelihood to attend the Lewis & Clark events in Montana if they were provided with appropriate trip-planning information. Among the 2020 respondents, 9% indicate they are "very likely" to attend, and 27% indicate they are "somewhat likely" to attend.

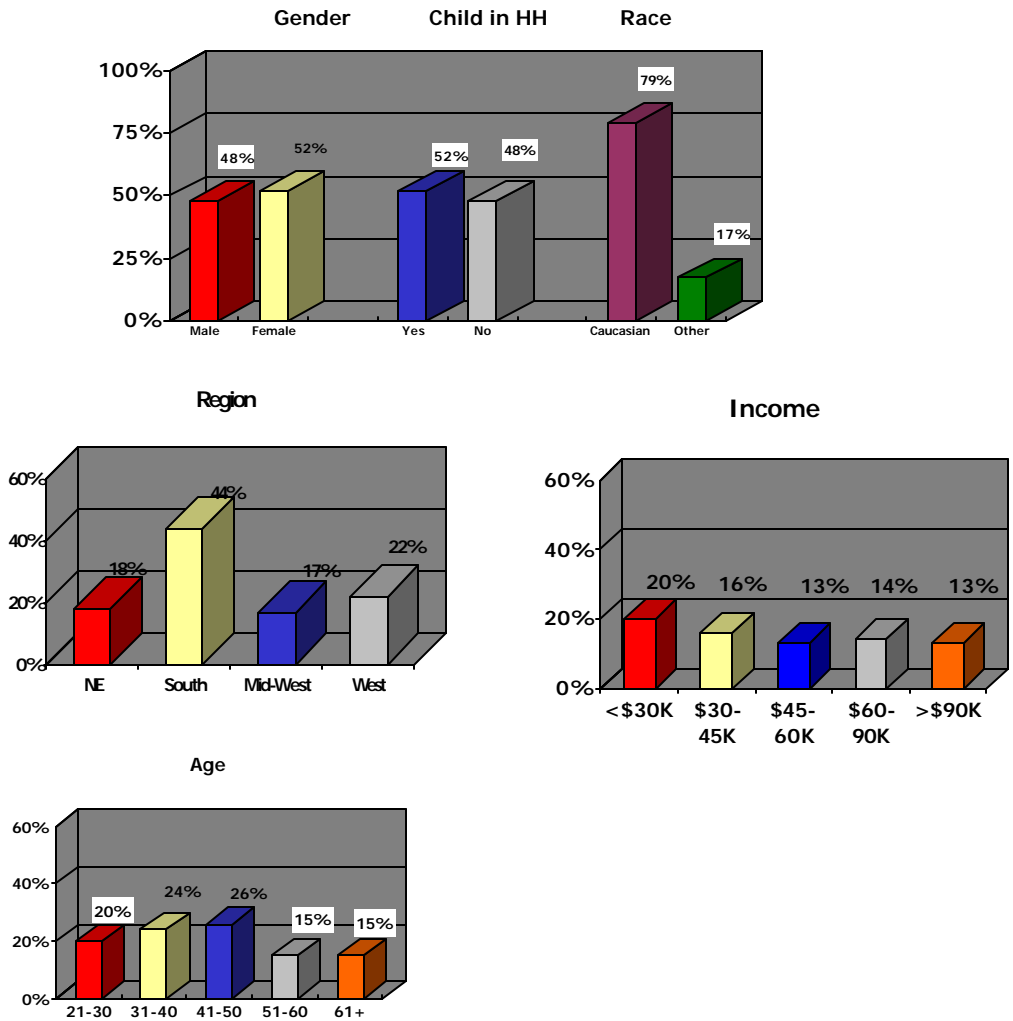


DETAILED FINDINGS (Continued)

Lewis and Clark Expedition (Continued)

Likelihood to Attend 200th Anniversary Events

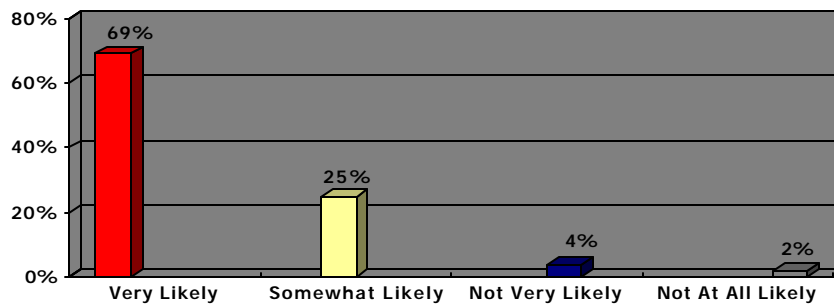
Focusing on the 172 respondents who are "very likely" to attend, the only demographic descriptor that does not parallel the total population is the presence of children in the household. Households with children represent 52% of those "very likely" to attend and yet only represent 38.0% of the total sample.



Likelihood to Explore Rural Areas

The 172 respondents indicating they are "very likely" to attend the 200th Anniversary events in Montana were asked their likelihood to spend time exploring some of Montana's rural areas that very closely trace the Expedition's route.

More than two-thirds of those very likely to attend the expedition are also very likely to visit rural areas associated with the Expedition (69%), while another 25% would be "somewhat likely" to explore rural areas that trace the Expedition's route.



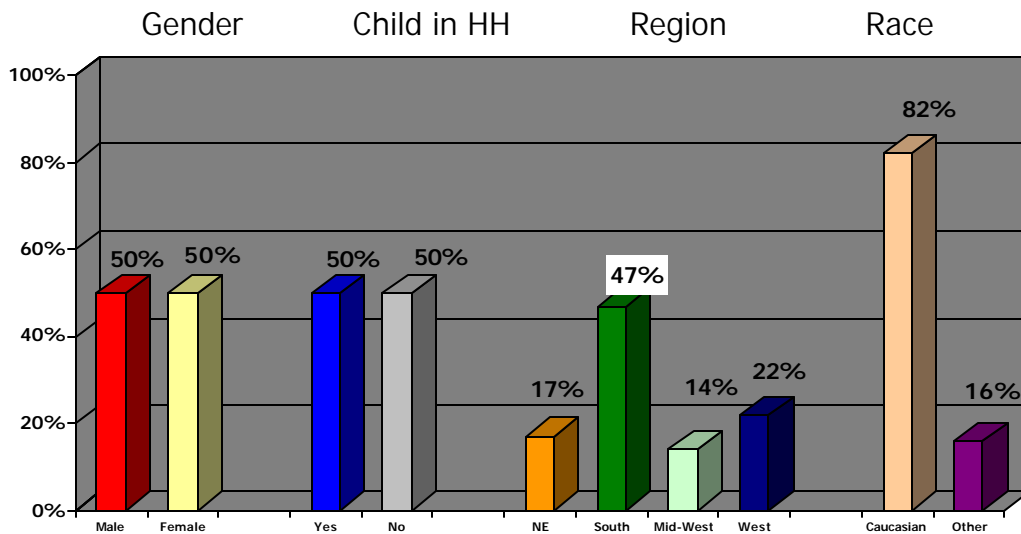
DETAILED FINDINGS (Continued)

Lewis and Clark Expedition (Continued)

Likelihood to Explore Rural Areas (Continued)

Among those respondents very likely to visit rural areas:

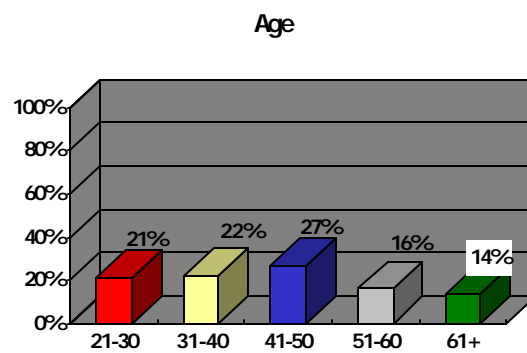
- There is a higher occurrence of households with children (50%) than in the total population (38.0%). These visitors are less likely to be situated in the northeast (17% of those very likely to explore rural areas v. 20% of all respondents) or the mid-west (14% of those very likely to explore rural areas v. 20% of all respondents) and more likely to be situated in the south (47% of those very likely to explore rural areas v. 38% of all respondents).



Lewis and Clark Expedition (Continued)

Likelihood to Explore Rural Areas (Continued)

- There is a lower occurrence of those 61+ (14%) than in the total population (22.0%).
- There is a higher occurrence of those 41-50 (27%) than in the total population (21.0%).



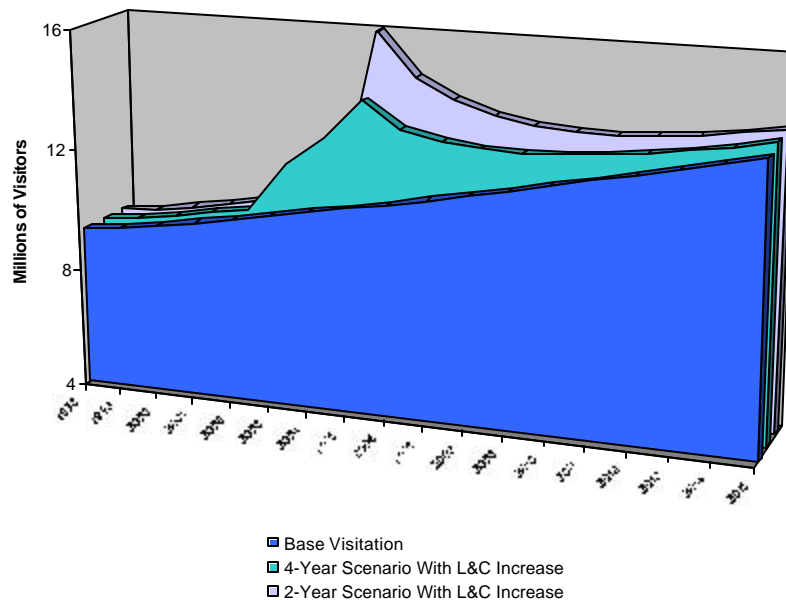
Projections for 2005

Projections of Visitors to Montana—2 years v. 4 years

Montana should expect a total of 8.9 million additional visits for the Lewis & Clark Bicentennial Commemoration in addition to the “base” visitation that would normally be expected.

If all of this increase takes place in 2005 and 2006, visitation levels would be at 16.1 million in 2005 and 14.6 million in 2006 given that 60% of the increase occurs during 2005 (because the most “adventurous” encounters took place in 1805).

If this increase takes place over the years 2003-2006 with 40% of the increase taking place in 2003-2004 and 60% in 2005-2006, expectations are 11.7 million in 2003, 12.7 million in 2004, 14 million in 2005, and 13.2 million in 2006.



The Big Picture

What it means for Montana

Based on a June 1 - October 31 visitation season (153 days) for the Lewis & Clark Commemoration, 4-year visitation projections would yield the following:

<u>Projected Lewis & Clark Visitor Increase</u>					
<u>Year</u>	<u>Base Visitation</u>	<u>Individuals Statewide</u>		<u>Groups Statewide*</u>	
		<u>Total Season</u>	<u>Per Day</u>	<u>Total Season</u>	<u>Per Day</u>
2003	10.3 million	1.4 million	9,150	583 thousand	3,813
2004	10.5 million	2.1 million	14,379	875 thousand	5,991
2005	10.8 million	3.2 million	20,915	1.3 million	8,715
2006	11.0 million	2.1 million	14,379	875 thousand	5,991

* Based on group size of 2.4 people.

TELEPHONE SURVEY

Hello. My name is _____ from Issues & Answers in Virginia Beach, VA. We are an opinion polling firm registered with the Better Business Bureau. We would like to conduct a very brief survey on the subject of travel and intentions to travel. This will take only a few minutes of your time, and we are not trying to sell anything. We are bound by the rules of the Better Business Bureau to solicit your opinions only and cannot attempt to sell anything.

1. Have you taken a pleasure trip out of your home state in the past 5 years?
 1. Yes
 2. No
 3. Don't Know / Not Sure [DO NOT READ]

2. [IF YES TO Q.1, ASK]:
Do you sometimes visit historical sites or attend historical events when you travel for pleasure?
 1. Yes
 2. No
 3. Don't Know / Not Sure [DO NOT READ]

3. How likely are you to take a pleasure trip out of your home state in the next 5 years?
 1. Very likely
 2. Somewhat likely
 3. Not very likely
 4. Not at all likely
 5. Don't Know / Not Sure [DO NOT READ]

4. Do you have any interest in visiting Montana in the next 5 years?
 1. Yes
 2. No
 3. Don't Know / Not Sure [DO NOT READ]

5. Have you ever visited the state of Montana?
 1. Yes
 2. No
 3. Not Sure [DO NOT READ]

6. [IF YES TO Q.5, ASK]:
How long has it been since your last trip to Montana?
1. Less than 1 year
 2. 1 – 2 years
 3. 3 – 5 years
 4. 6 – 10 years
 5. Greater than 10 years
 6. Not Sure [DO NOT READ]
7. [IF YES TO Q.5, ASK]:
What were the purposes of your trips to Montana?
1. Vacation / Pleasure / Meet family or friends
 2. Business
 3. To attend school
 4. Other [Specify _____]
8. [IF YES TO Q.5, ASK]:
While in Montana, did you ever visit a historical site or attend a historical event?
1. Yes
 2. No
 3. Not Sure [DO NOT READ]
9. Have you ever heard of Lewis & Clark or the Lewis & Clark Expedition?
1. Yes
 2. No
 3. Not Sure [DO NOT READ]
10. [IF YES TO Q.9, ASK]:
How much do you know about the original Lewis & Clark Expedition?
1. Have a great deal of knowledge about it
 2. Have a moderate amount of knowledge about it
 3. Have very little knowledge about it
 4. Have no knowledge about it
 5. Not Sure [DO NOT READ]

I am going to read you a description of the Lewis & Clark Expedition:

Nearly 200 years ago, Meriwether Lewis and William Clark led an expedition across western North America to establish an all-water route connecting the Pacific and Atlantic Oceans. Along their route, the Expedition mapped rivers, catalogued many new species of plants and animals and encountered dozens of Indian tribes who had called the West home for centuries. With the help of Sacajawea, their acquired Indian guide, the Lewis & Clark Expedition achieved their goal of reaching the Pacific Ocean and returning within three years. This journey across unknown territory began the westward movement of American settlers.

11. Based on the description I just read to you, what most interests you about the Lewis & Clark Expedition?

12. What do you find least interesting?

13. Montana is planning to commemorate the 200th anniversary of the Lewis & Clark Expedition through community and regional events. These events will include festivals, celebrations and guided river trips. Site tours and re-enactments of the Expeditions' experiences and encounters with Indian tribes will also be offered at various sites the Expedition was known to use. How much interest do you have in these types of events in Montana?

1. Very interested
2. Somewhat interested
3. Not very interested
4. Not at all interested
5. Don't Know / Not Sure [DO NOT READ]

14. [IF ANSWERED VERY, SOMEWHAT OR NOT VERY INTERESTED TO Q.13, ASK]:
If you were provided with appropriate trip-planning information, how likely is it that you would attend these types of events in Montana?

1. I would be very likely to attend
2. I would be somewhat likely to attend
3. I would be somewhat unlikely to attend [SKIP TO Q.16]
4. I would not attend [SKIP TO Q.16]
5. Don't Know / Not Sure [DO NOT READ]

15. [IF ANSWERED VERY LIKELY, SOMEWHAT LIKELY OR SOMEWHAT UNLIKELY TO Q.14, ASK]:
How likely is it that you would spend time exploring some of Montana's rural areas that very closely trace the Expedition's route through the state?

1. Very likely
2. Somewhat likely
3. Not very likely
4. Not at all likely
5. Don't Know / Not Sure [DO NOT READ]

16. [IF ANSWERED "UNLIKELY" or "WOULD NOT ATTEND" TO Q.14, ASK]:
Why would you not attend?

1. Not enough time
2. Not enough money
3. Too far away
4. No interest
5. Other [Specify:_____]

DEMOGRAPHICS:

Now I have just a few questions about yourself for statistical purposes.

17. [RECORD GENDER BY OBSERVATION ONLY]:

1. Male
2. Female

18. Which of the following age groups contains your age? [READ LIST]
1. 18-30
 2. 31-40
 3. 41-50
 4. 51-60
 5. 61-64
 6. 65 and over
 7. Refused [DO NOT READ]
- 19a. Including yourself, how many adults are currently living in your household?
- _____ [99 = Refused]
- 19b. How many children?
- _____ [99 = Refused]
20. Which of the following groups best indicates your household's total annual income before taxes...[READ LIST]?
1. Under \$15,000
 2. \$15,000 to under \$30,000
 3. \$30,000 to under \$45,000
 4. \$45,000 to under \$60,000
 5. \$60,000 to under \$75,000
 6. \$75,000 to under \$90,000
 7. \$90,000 to under \$105,000
 8. \$105,000 or more
 9. Refused [DO NOT READ]
21. In order to insure a fair representation of the ethnic groups, could you please tell me if you consider yourself....[READ LIST]?
1. Caucasian/White
 2. Black
 3. Hispanic
 4. Asian
 5. American Indian
 6. Some other ethnic background [Specify:_____]
 7. Refused [DO NOT READ]
22. And finally, in what state do you currently reside? _____

THANK YOU FOR YOUR TIME.