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# A Longitudinal Study of Montanans' Intrastate Travel Residents' Monthly Reporting of Travel

Jeremy L. Sage

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# A Longitudinal Study of Montanans' Intrastate Travel

## Residents' Monthly Reporting of Travel

Jeremy L. Sage

8/8/2018



This study tracks the long distance (at least 50 miles one-way) travel behaviors of a panel of Montana residents of the course of 2017 via monthly online travel surveys.

## **A Longitudinal Study of Montanans' Intrastate Travel**

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## Abstract

The purpose of this report was to provide complementary data and information to the Resident Travel Study (Report 2018-6) by following a panel of 285 Montanans for the whole of 2017. This panel based study allowed for a deeper look at the traveling habits of the respondents through a series of monthly surveys administered online. This report highlights travel frequency, purpose, spending and destination characteristics.

## Executive summary

In 2017, the Institute for Tourism and Recreation Research (ITRR) tracked a cohort of 285 Montanans via monthly travel surveys about their long distance travel. Travel studies routinely use a one-way distance of at least 50 miles as the indicator of long distance travel. The goal of this study was to complement ITRR's larger Resident Travel Study (Report 2018-6) by providing increased detail on a subset of travelers.<sup>1</sup>

The Outdoor Industry Association suggests that 81 percent of Montanans participate in outdoor recreation every year. The present report, takes this observation one step further and identifies that not only do a large portion of Montanans engage in recreation, but they do so often and frequently travel throughout the state to do so. This intrastate travel for recreation and pleasure thus contributes significantly to the economies within the state. Similar to visitors coming to the state for recreation, many Montanans travel during the summer months. In fact, more than 60 percent of all respondents indicated they took an average of about 2.25 overnight recreation trips in each of June, July, and August (Figure ES- I).

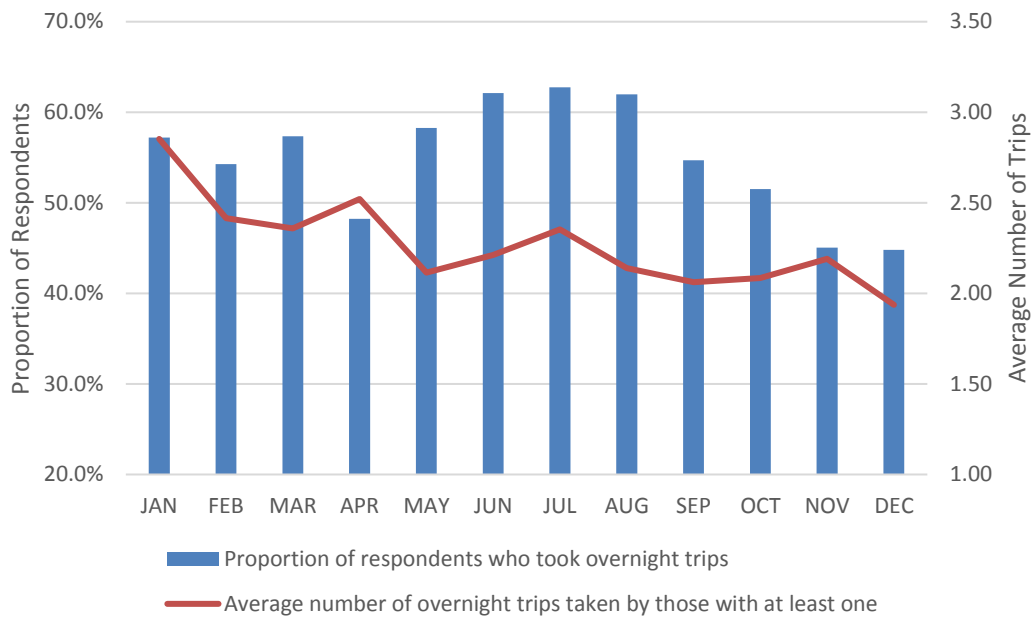
Though fewer respondents took day trips during these summer months, those that did took an average of more than 3.5 trips per month (Figure ES- II). Over the course of the year-long study, panelists recorded nearly 2,000 trips, with recreation or vacation based trips for either a day or overnight routinely being the top reasons for travel (Figure ES- III).

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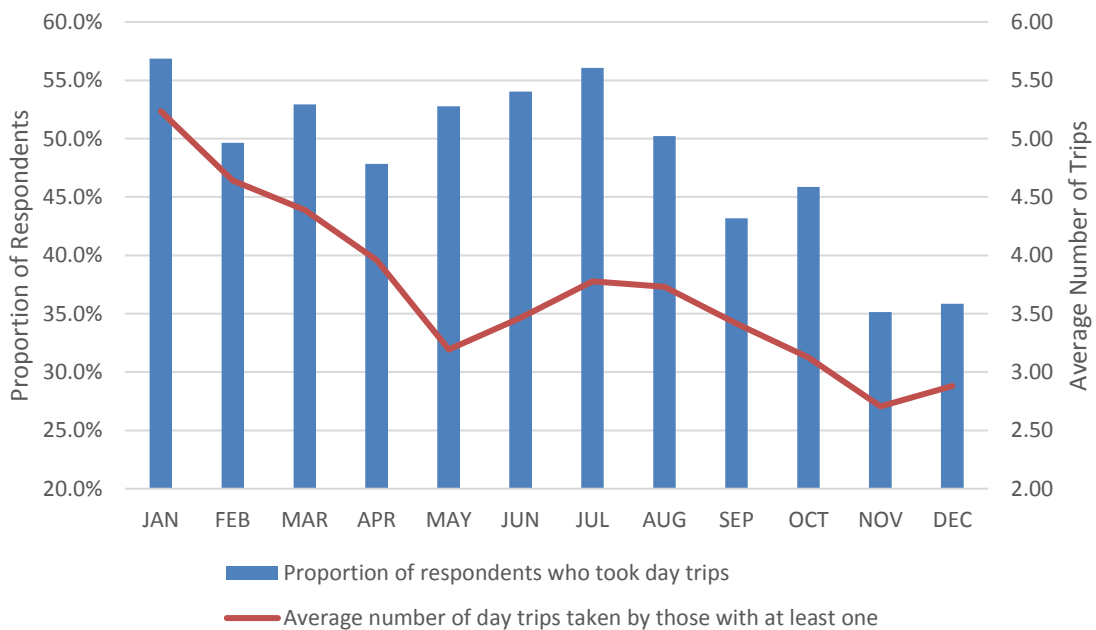
<sup>1</sup> ITRR recommends referring to Report 2018-6 for generalizable information. Panelists for the present report opted-in to the study in two phases and thus may not reflect the average Montana resident.

# A Longitudinal Study of Montanans' Intrastate Travel 2018

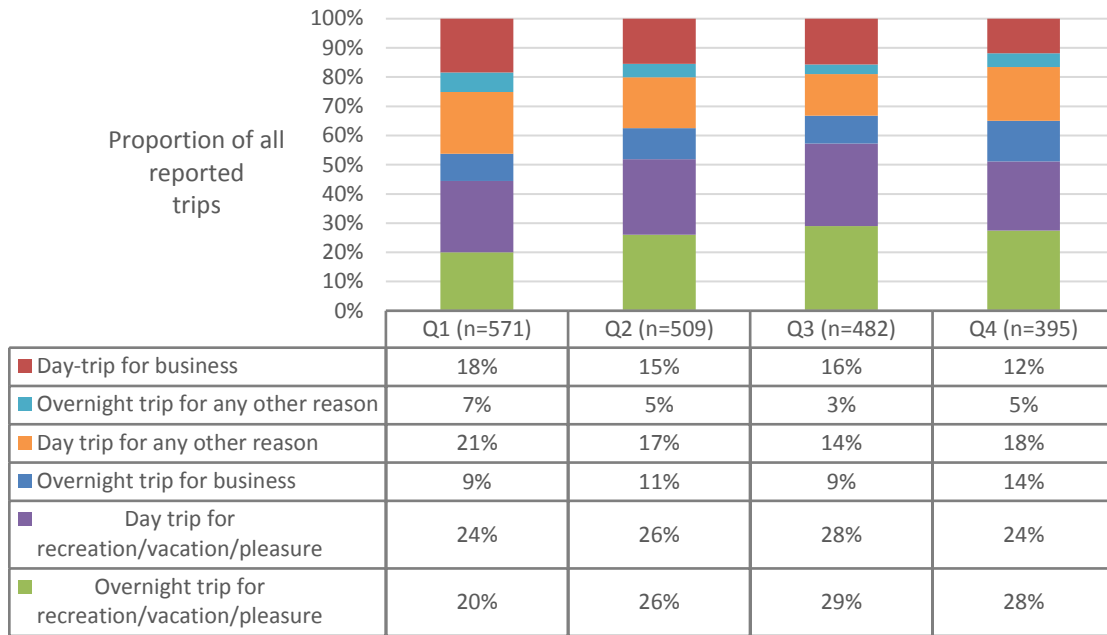
**Figure ES- I. Overnight trips by panelists.**



**Figure ES- II. Day trips by panelists.**



**Figure ES- III. Frequency of reported trips by purpose.**

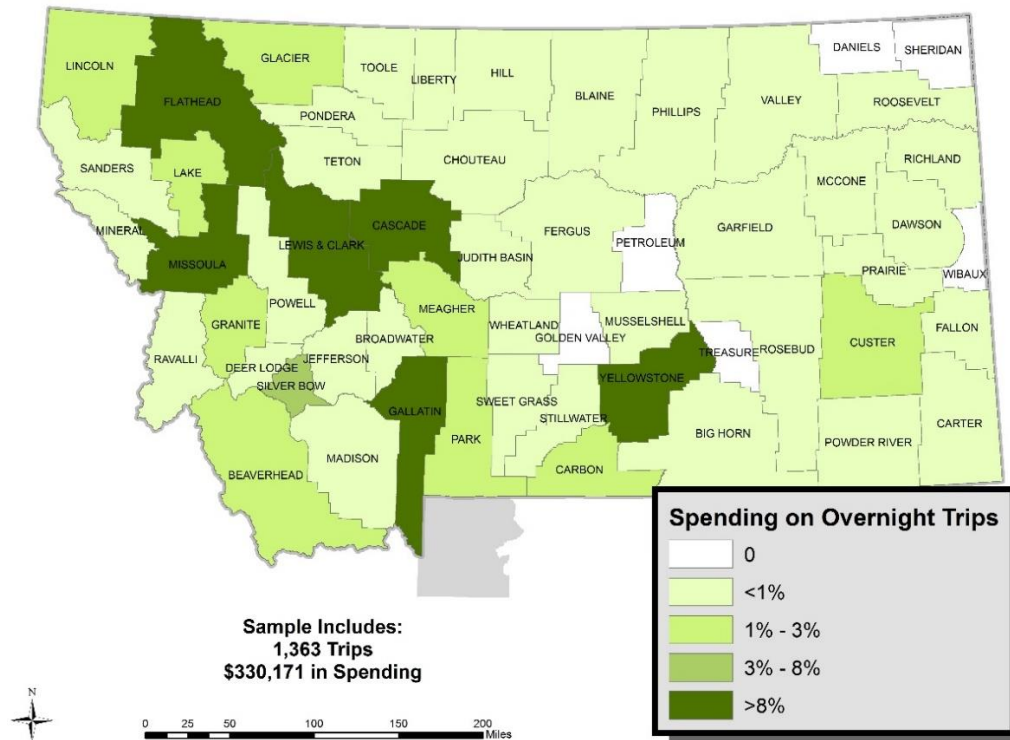
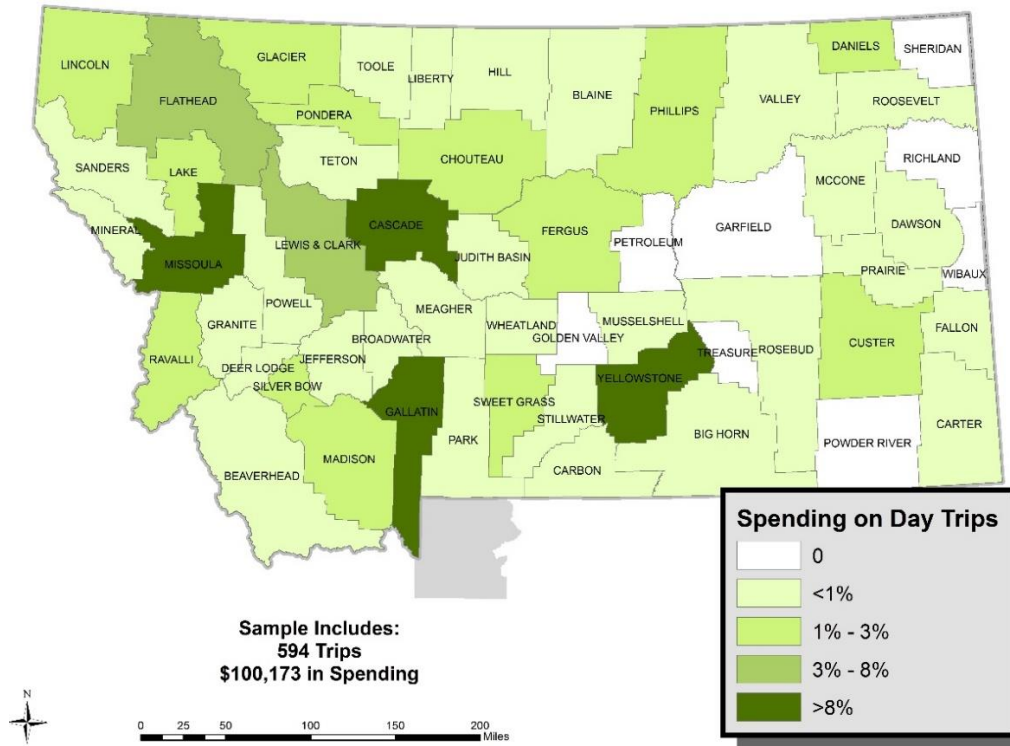


Montanans on the panel report enjoying and participating in what the state has to offer much the same way visitors do. Highest among outdoor activities of residents in the panel was scenic driving, with roughly one-third of all respondents taking part in any given quarter. Respondents are also frequent hikers and campers during the summer months with about a fifth taking part.

Not only did the Montana respondents in the panel frequently travel for recreation, but the necessity to travel more than 50 miles for other reasons like shopping, dining, and medical appointments further pulls residents and their dollars beyond their communities (Figure ES- IV). These travels not only serve the destinations receiving this travel, but also those communities in between as travelers make stops for food, fuel, and recreation. This report and its accompanying resident state wide intercept survey demonstrate the importance of remembering that Montanans are frequently tourists in our own back yard throughout the year, thus ensuring sufficient private and public travel infrastructure is vital to maintaining quality of life in Montana.

# A Longitudinal Study of Montanans' Intrastate Travel 2018

Figure ES- IV. Day and overnight spending by county



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## Introduction

The traveling characteristics of visitors to Montana are well understood through more than two decades of directed research by the Institute of Tourism and Recreation Research (ITRR).<sup>2</sup> Much less understood, in detail, is the nature of intrastate travel and spending by Montanans as they venture more than 50 miles from home.<sup>3</sup> With 81 percent of Montanans participating in outdoor recreation each year, the magnitude of travel and spending is not a trivial value.<sup>4</sup> This becomes even less trivial when considering the geographic spread of the state and the necessity of many residents to travel at least 50 miles for major shopping trips and for business into the state's urban centers.

## Purpose

The purpose of this report was to provide complementary data and information to the Resident Travel Study (Report 2018-6) by following a panel of 285 Montanans for the whole of 2017. This panel based study allowed for a deeper look at the traveling habits of the respondents through a series of monthly surveys administered online. This report highlights travel frequency, purpose, spending and destination characteristics.

## Methods

The Institute for Tourism and Recreation Research routinely collects email addresses of intercepted nonresidents and residents who indicate a willingness to participate in future surveys by the Institute. Typically, as an issue arises in which a panel of residents or nonresidents is deemed to add depth to our understanding, an online survey is created and delivered to the appropriate panel. In the case of the present survey, the resident panel provided an opportunity to take a deeper dive into the long distance travel (50 or more miles from home) habits of Montanans.

## Survey design

### Invitation & Demographics

In January 2017, an invitation email was sent to the complete resident panel, 904 email addresses, via the online Qualtrics platform. This invitation email served as an introduction to the purpose of the survey and provided recipients an opportunity to opt-in to the series of 12 forthcoming surveys. A follow-up reminder email was sent one week later. Upon accepting the invitation to participate, respondents were asked a series of demographic questions including their zip codes, household size, household income, employment status, age, and education.

Each respondent agreeing to take part in the survey was provided with a unique and anonymous identifier to be used to correlate all surveys taken by that respondent. In addition to linking all surveys, this allowed the demographics questions to only be asked once, thus reducing the time spent on the actual travel surveys.

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<sup>2</sup> <http://itrr.umt.edu/>

<sup>3</sup> One-way travel of at least 50 miles is used by the US Department of Transportation to denote long distance travel in their *National Household Travel Survey* series.

<sup>4</sup> [https://outdoorindustry.org/wp-content/uploads/2017/07/OIA\\_RecEcoState\\_MT.pdf](https://outdoorindustry.org/wp-content/uploads/2017/07/OIA_RecEcoState_MT.pdf)

## Monthly Travel Survey

Twelve identical surveys were emailed to the participants on the first Monday of the month following the month of travel in question. Two reminder emails were sent at one week intervals, thus allowing the participants three full weeks per month to respond. Respondents were urged to participate in each month, even if they did not travel in the previous month. To incentivize participants, every completed survey entered them into an end of the year drawing for one of three Visa gift cards, thus the more they participate, the more chances they had to win.

The intent of the resident travel survey was only in relation to long distance travel by Montanans. As such, the opening question of the monthly travel survey asked "Did you take any day or overnight trips 50 miles or more away from home in (Month) of 2017 (including shopping, business, vacation, etc.)?". If no, the respondent was thanked for their time and taken to the end of the survey. If the respondent indicated they did take at least one trip of 50 miles or more, they were routed through the complete survey. The survey contained two primary components. The first, and shorter, component asked the respondent to recall all trips and type of trips they took in the previous month. This question series required the respondent to indicate the total number of trips in each of the following categories, when that category was the primary purpose of the trip (primary considered only to minimize double counting):

- Overnight business trips;
- Day-trips for business;
- Overnight trips for recreation/vacation/pleasure;
- Day-trips for recreation/vacation/pleasure;
- Overnight trips for any other reason (medical, shopping, etc.);
- Day-trips for any other reason (medical, shopping, etc.).

The second component asked the respondents to recall their most recent trip of 50 or more miles. Using this trip for the remainder of the survey, respondents were asked specific details about their trip characteristics. Respondents were prompted to record only their activities while in Montana, even if their described trip took them out of state. Characteristics of the trip include:

- Type of trip (using same types as previously listed);
- Nights spent away from home, but still in Montana;
- Primary destination(s);
- Adults in traveling party;
- Children in traveling party;
- Mode of travel;
- Spending at home in preparation for trip;
- Spending away from home at up to 10 different towns/locations;
- Activities they participated in while traveling.

Respondents had the opportunity to report at home spending for fuel, groceries/snacks, retail goods, and services. While on the road, they not only reported on the previous items, but also lodging and restaurants/bars. This report focuses only on those purchases made away from home.

## Limitations

The panel used for this study are self-selected in two phases. First, the panel is drawn from those Montana residents who voluntarily provide their email addresses following an initial random intercept as part of ITRR's statewide routine resident survey<sup>5</sup>. Second, respondents were asked to opt-in to the 12 month survey.

## Response rate

The initial invitation to participate was sent to 904 email addresses. Five emails were “bounced” and determined to be undeliverable. In total, 353 surveys were completed for a response rate of 39 percent. Of those 353 responses, 347 (98.3 percent) indicated a willingness to participate. Given the high rate of opting in by respondents, it is likely (though not verifiable) that many of those who did not respond at all were simply choosing to opt out. However, we cannot verify the breakdown of opting out versus not having opened and read the email at all.

The population for the 12 travel surveys was the 347 participants who opted in. Table 1 displays the response rate for each month's travel survey. January yielded the highest response at 82 percent. All surveys remained above 60 percent. Every participant who agreed to take part completed at least one survey. More than one third of participants (n=119) completed every survey (Table 2).

**Table 1. Monthly response rate (N=347).**

Month	Total Responses	Response Rate
January	285	82%
February	280	81%
March	272	78%
April	255	73%
May	254	73%
June	235	68%
July	239	69%
August	221	64%
September	234	67%
October	229	66%
November	222	64%
December	212	61%

<sup>5</sup> The resident survey conducted by ITRR is a brief intercept based survey. Surveys are typically conducted over the course of a quarter and cover a variety of topics from perceptions of tourism in Montana, to knowledge of Aquatic Invasive Species (AIS).

Table 2. Number of surveys completed by participants.

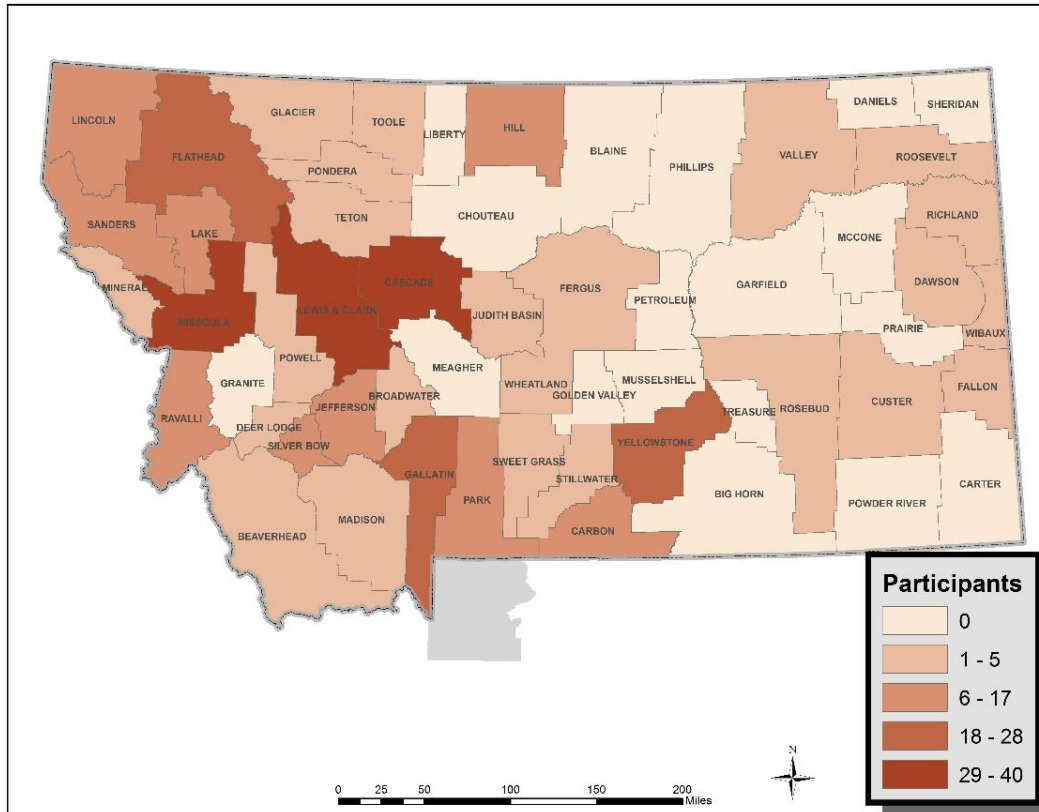
Surveys Completed	Number of Participants	Proportion
0	0	0%
1	16	5%
2	14	4%
3	16	5%
4	16	5%
5	13	4%
6	14	4%
7	18	5%
8	21	6%
9	21	6%
10	26	7%
11	42	12%
12	119	34%

## Results

### Demographics

Thirty-eight of Montana's 56 counties were represented by at least one respondent (Figure 1). Missoula County had the most participants with 40, followed closely by Cascade (37) and Lewis & Clark (34) Counties. Respondents were nearly split evenly, 54 to 46 percent respectively, between living within or outside of a city limits. The average household size of the participants was 2.43, with 53 percent living in a two person household. Respondents ranged in age from 21 to 82, with a mean age of 52. Just more than half, 51 percent, of the participants were employed full-time, with another 26 percent indicating they are retired (Table 3). An annual household income of \$50,000-\$74,999 was the most frequently represented group (n=70). Fifty-nine percent of participants had an annual household income of less than \$74,999 (Table 4). The majority of participants possessed an undergraduate degree or higher (Table 5).

**Figure 1. Participant county of residence.**



**Table 3. Participant employment status.**

Employment Status	Frequency	Proportion
<b>Employed full-time</b>	177	51%
<b>Retired (not working for pay)</b>	90	26%
<b>Employed part-time year-round</b>	42	12%
<b>Not employed outside the home and not of retirement age</b>	18	5%
<b>Seasonal employment (non-student)</b>	11	3%
<b>Student (employed during school or seasonally such as summer)</b>	7	2%
<b>Student (not employed)</b>	2	1%
<b>Total</b>	<b>347</b>	<b>100%</b>

**Table 4. Participant annual household income.**

<b>Annual Household Income</b>	<b>Frequency</b>	<b>Proportion</b>
Less than \$25,000	37	11%
\$25,000 - \$49,999	70	20%
\$50,000 - \$74,999	98	28%
\$75,000 - \$99,999	50	14%
\$100,000 - \$149,999	60	17%
\$150,000 - \$199,999	12	3%
\$200,000 or greater	10	3%
<b>Total</b>	<b>337</b>	<b>100%</b>

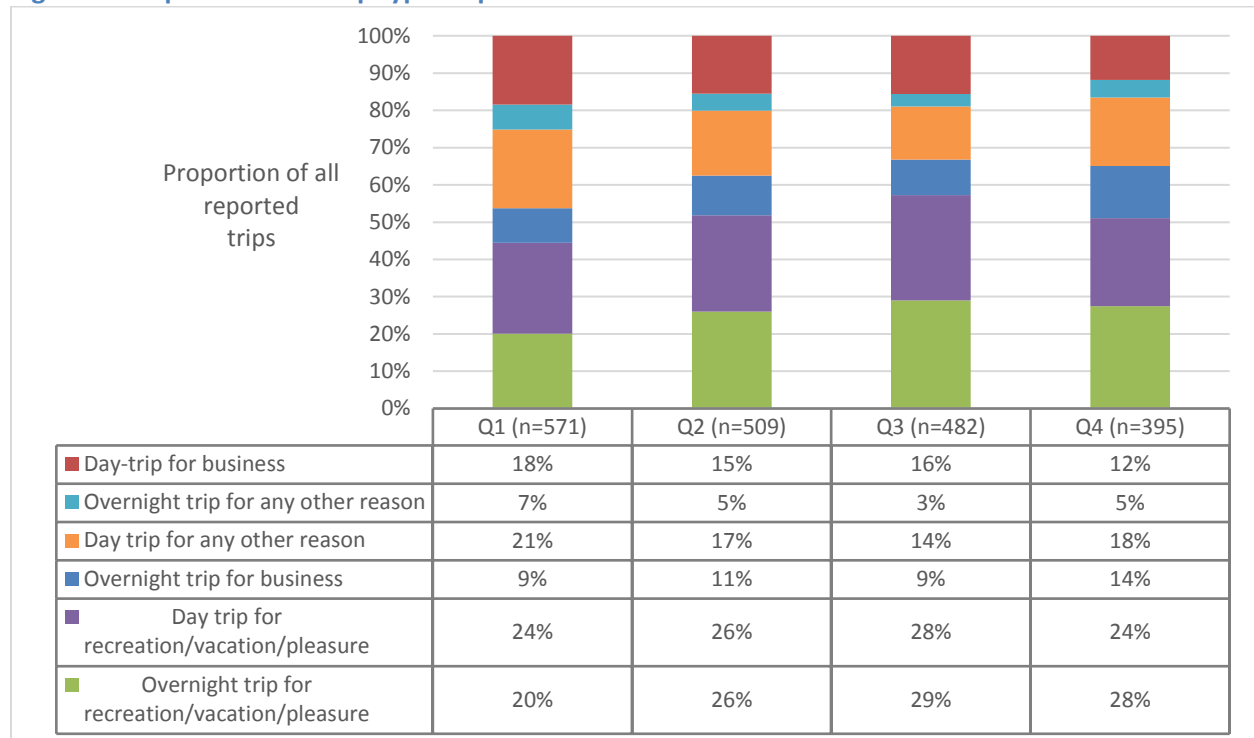
**Table 5. Participant education level.**

<b>Participant Education Level</b>	<b>Frequency</b>	<b>Proportion</b>
Less than high school	0	0%
High school or GED	61	18%
Associated, Trade, or Certificate	62	18%
Undergraduate degree	135	39%
Advanced degree (M.S., Ph.D., J.D., M.D.)	89	26%
<b>Total</b>	<b>347</b>	<b>100%</b>

## Monthly Trips<sup>6</sup>

All reported trips, day or overnight, are reported in Figure 2. Day and overnight trips for recreation, vacation, or pleasure are the most frequently cited reasons for long distance travel by participants. Overnight trips for any reason peaked during the summer months, with more than 60 percent of respondents indicating they took at least one overnight trip for any reason during each of June, July, and August (Figure 3). Day trips for any purpose were also frequently recorded during the summer as well; however for day trips, January experienced the highest rate of respondents taking at least one trip (Figure 4). In total, all respondents took an average of 1.26 overnight trips per month and 1.87 day trips.

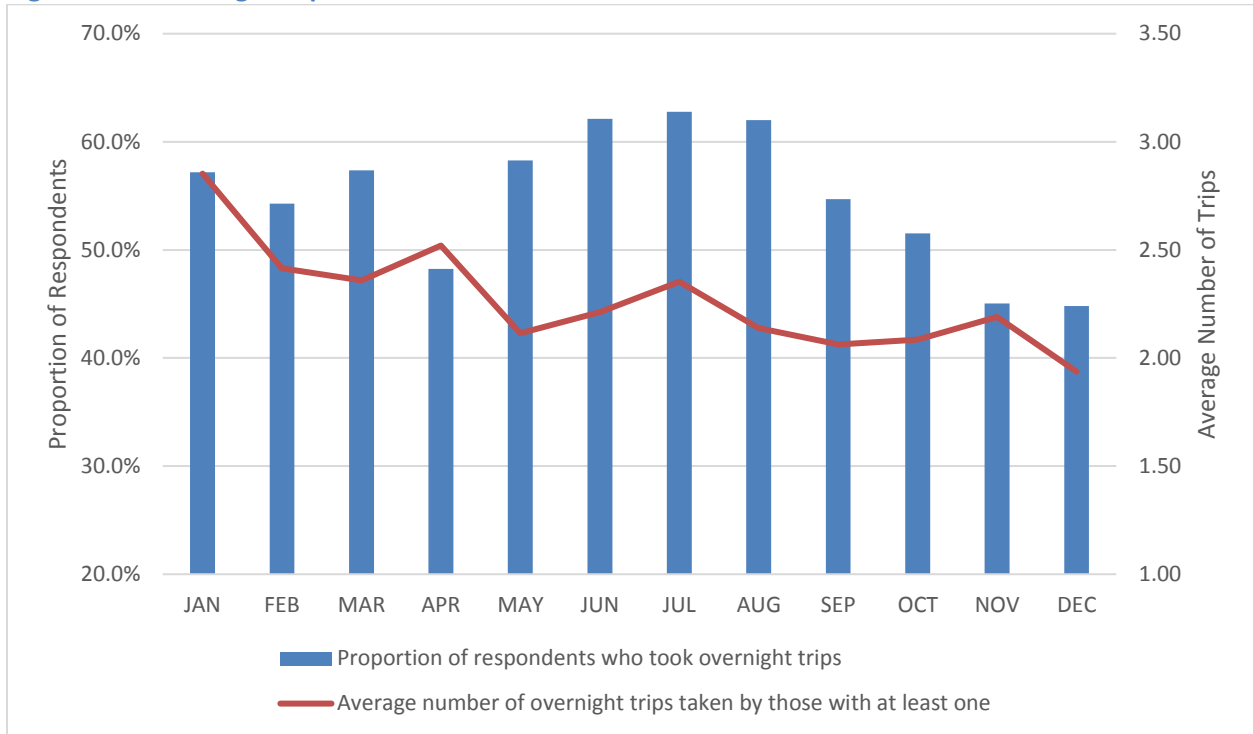
**Figure 2. Proportion of all trip types reported.**



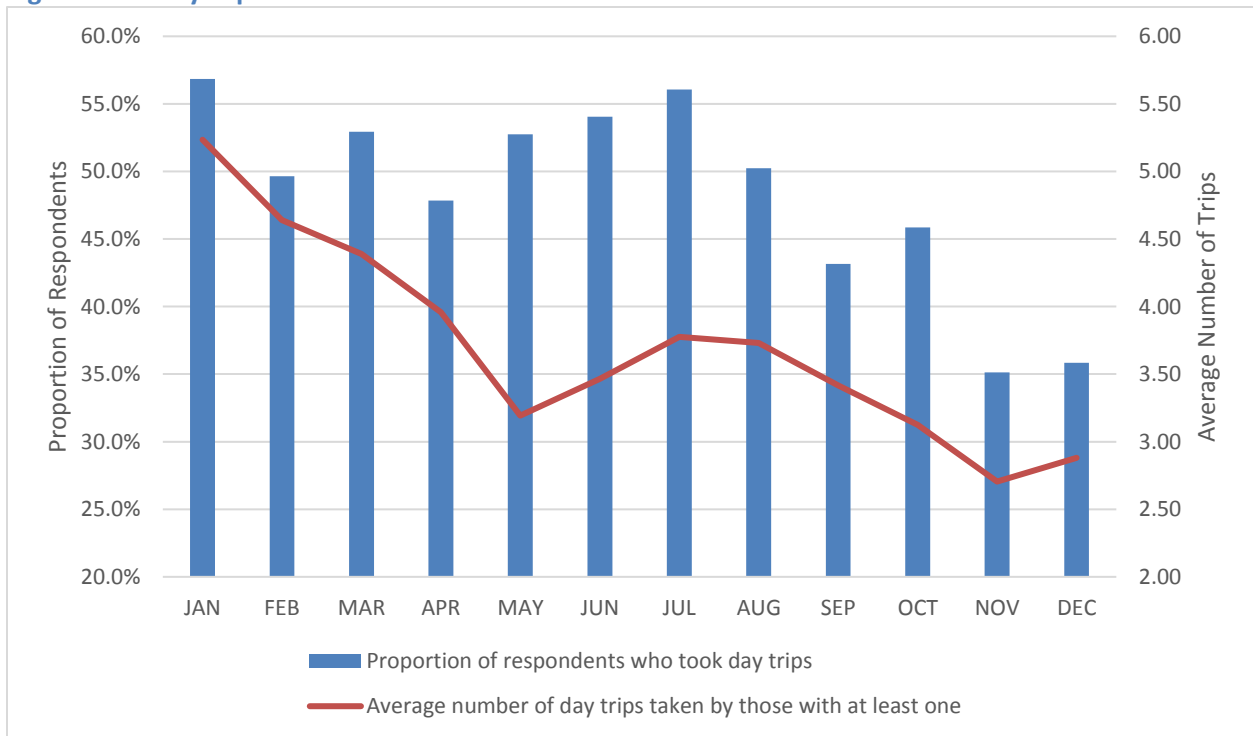
<sup>6</sup> All figures contained in the *Monthly Trips* section are displayed based on all respondents regardless of how many monthly surveys were completed. To check for any distortion of the results due to attrition or nonresponse, a comparison of Figure 3 was made to data only generated based on those 119 participants who completed all surveys. We determined that there is insufficient evidence to suggest that those answering all 12 surveys are significantly different than all others.



**Figure 3. All overnight trips.**

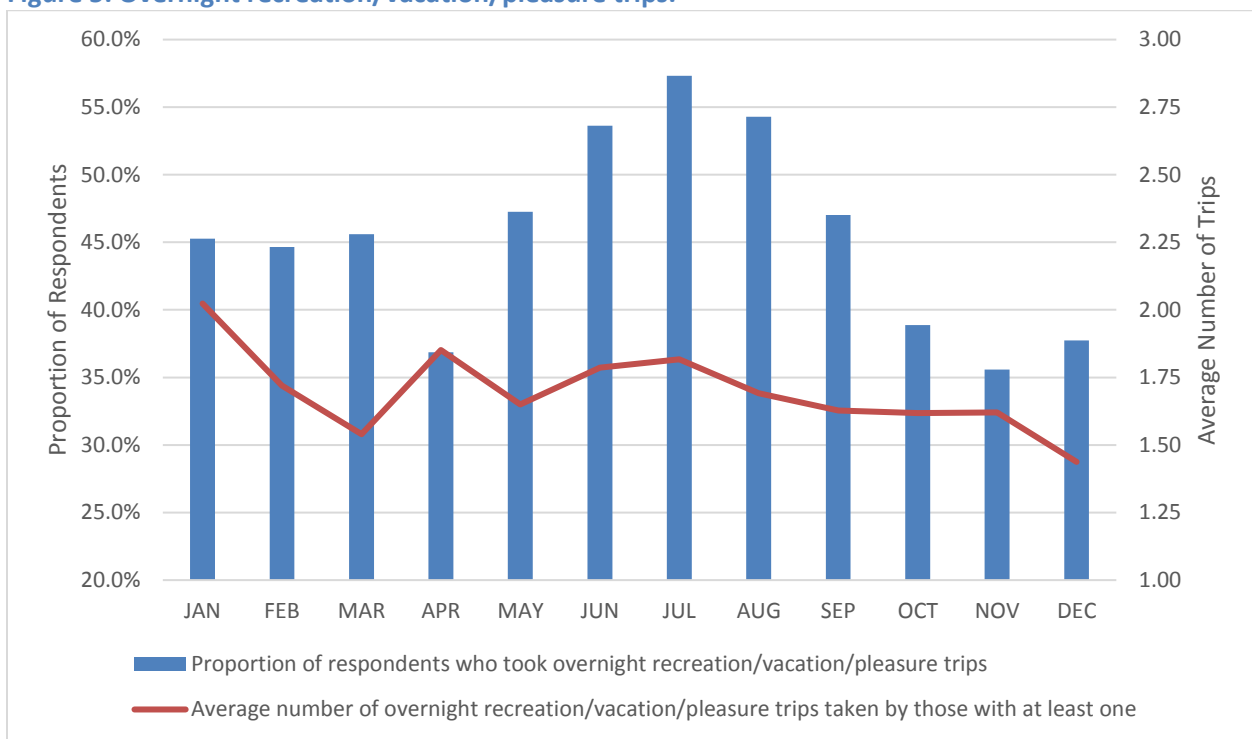


**Figure 4. All day trips.**



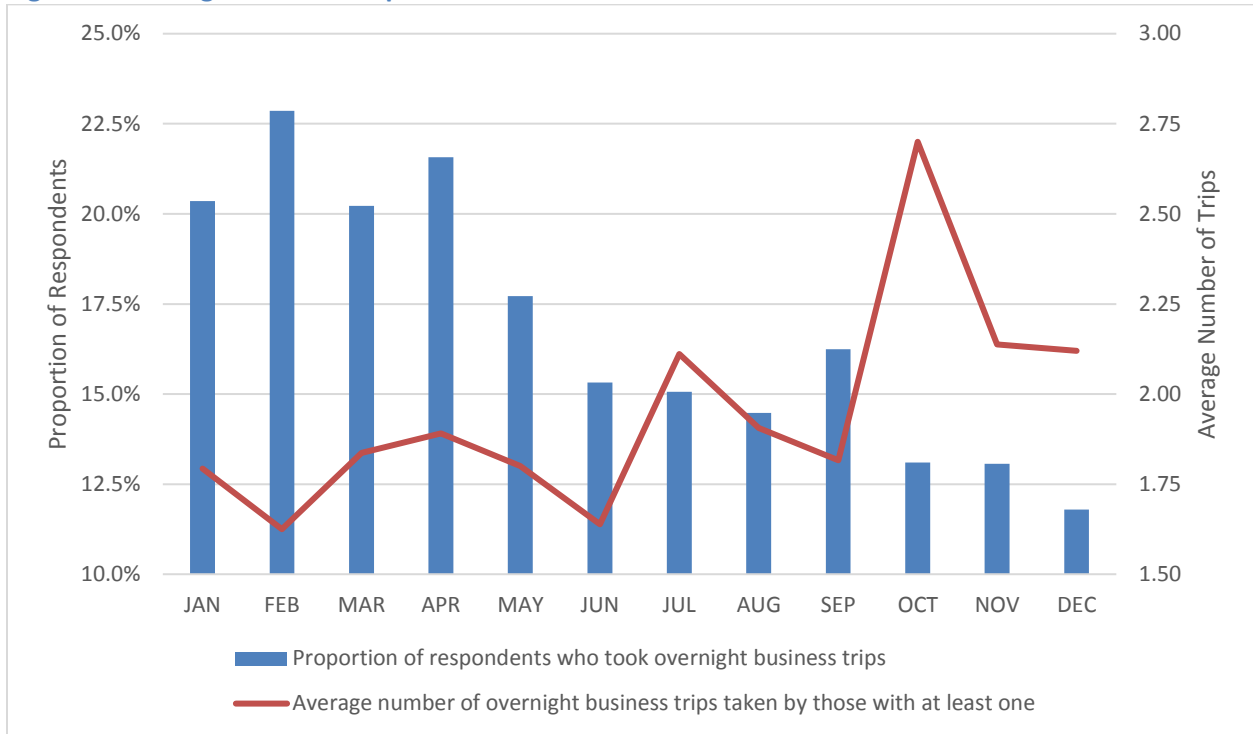
Respondents were most likely to indicate that their overnight trips were for recreation/vacation/pleasure, with at least one-third of all respondents indicating such travel in any given month. These travels peaked in July with 57 percent of respondents traveling for overnight recreation (Figure 5). Those respondents who traveled at least once for overnight recreation in July took on average 1.79 trips. The rate of overnight travel for business or other reasons tended to be significantly lower, with a range of 12-23 percent of respondents traveling in a month for business (Figure 6), and 5-15 percent traveling overnight for other reasons (Figure 7).

**Figure 5. Overnight recreation/vacation/pleasure trips.**

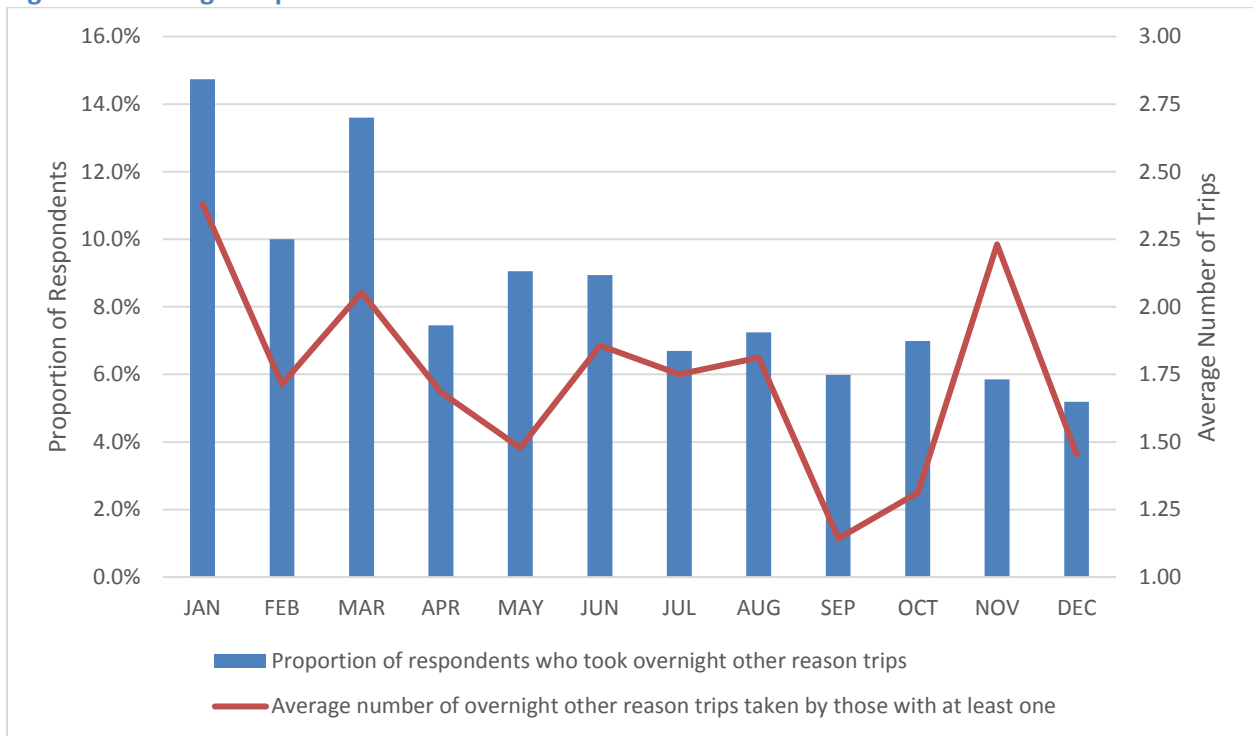


Though still routinely higher, day trips for recreation/vacation/pleasure does not appear to dominate other day trip purposes to near the degree as its overnight counterpart. Respondents who took at least one day trip averaged 2.39 day trips per month for recreation over the course of the year, with a range of 21-42 percent taking such a trip in any given month (Figure 8). Day trips for business were the most common among those who took day trips, with an average of 2.77 trips per month across the year; however, fewer people on average took such trips (10-24 percent across months) (Figure 9). Day trips for other reasons showed the largest range across months, with a low of 14 percent in November, to a high of 31 percent in January (Figure 10).

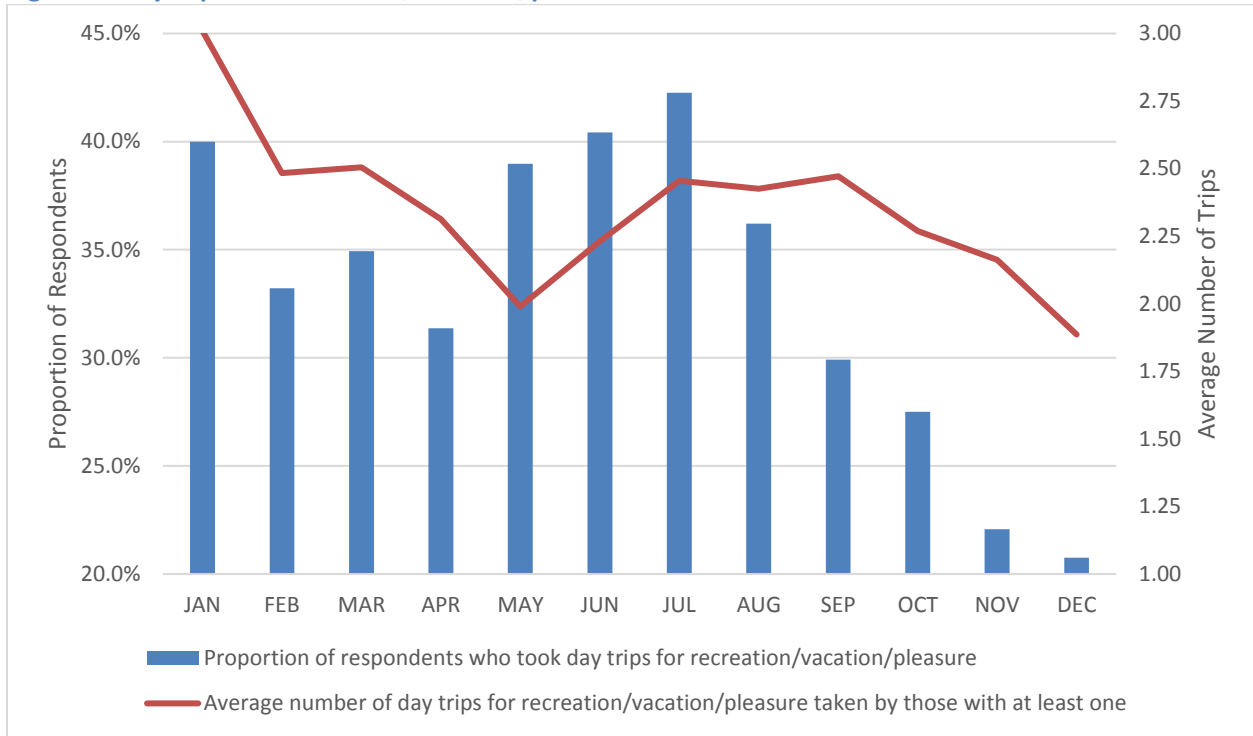
**Figure 6. Overnight business trips.**



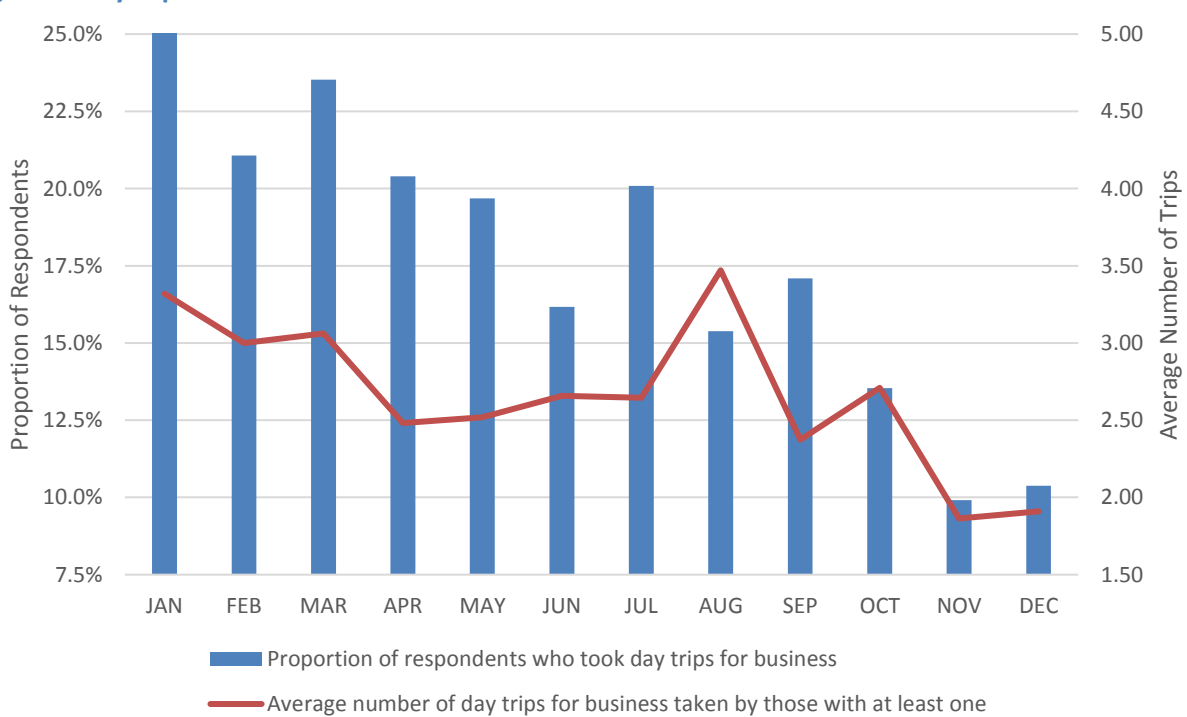
**Figure 7. Overnight trips for other reasons.**



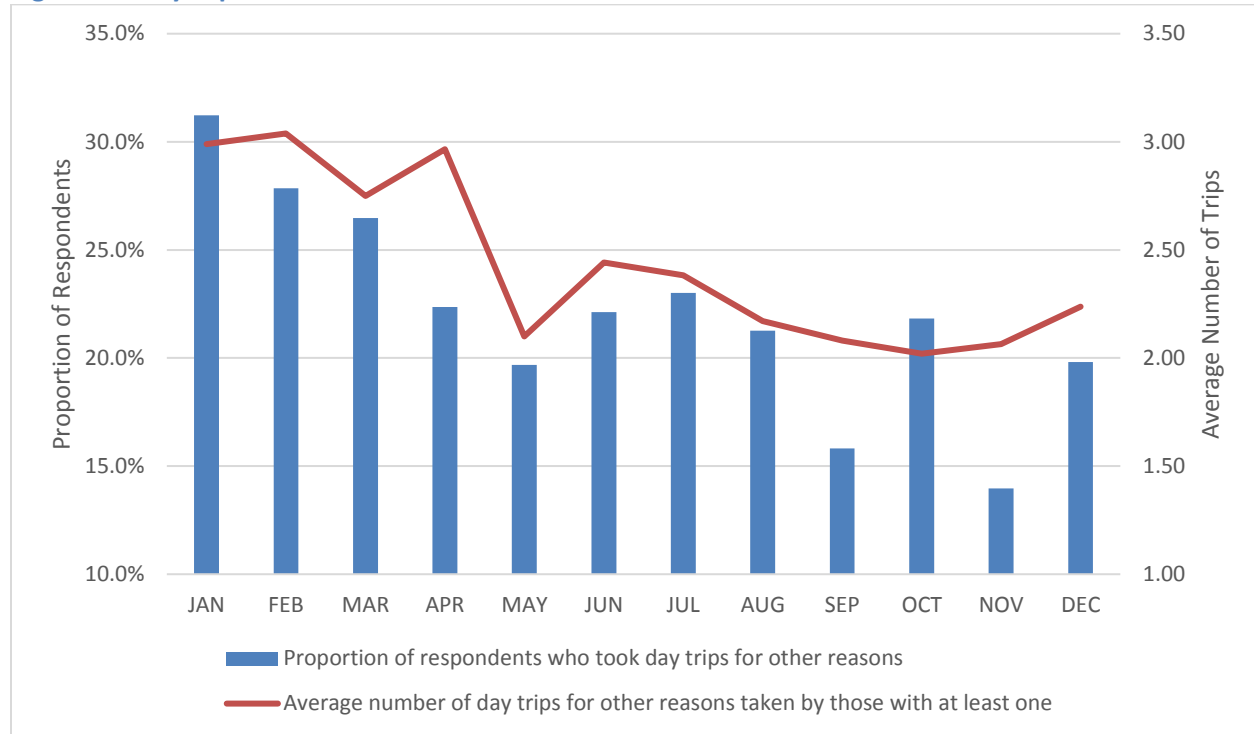
**Figure 8. Day trips for recreation/vacation/pleasure.**



**Figure 9. Day trips for business.**



**Figure 10. Day trips for other reasons.**

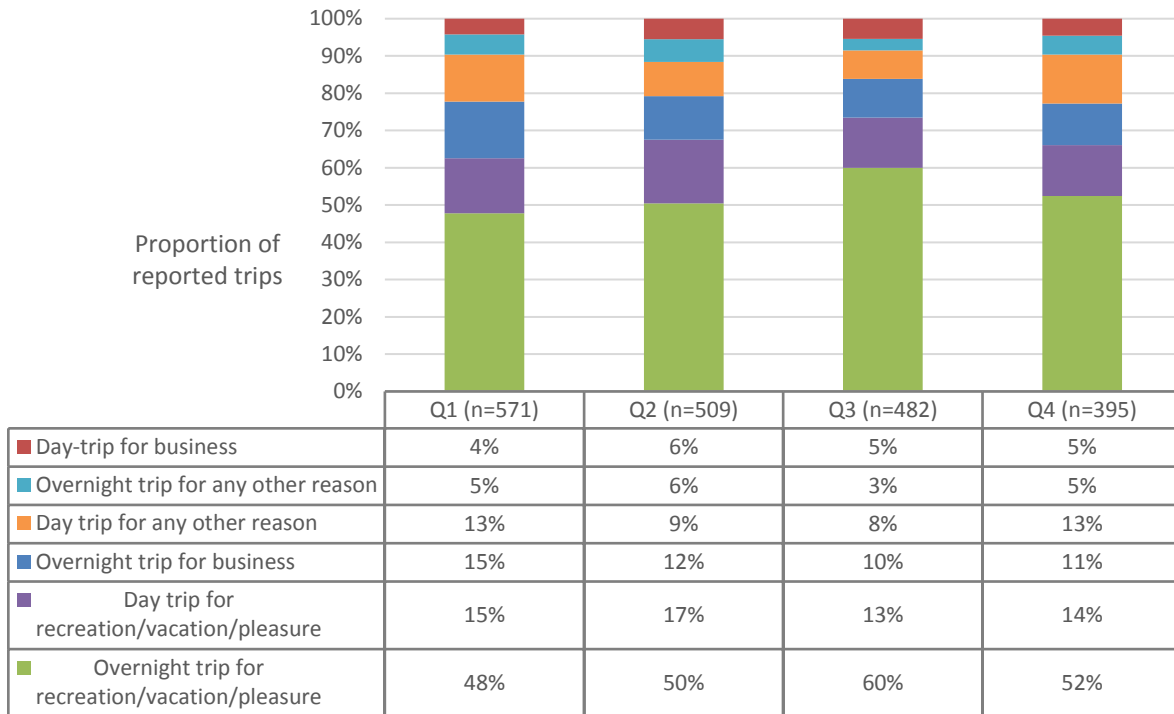


### Trip Characteristics

As previously noted, respondents were asked to not only tally all their long distance travels by category for the preceding month, but to also provide deeper detail on the most recent trip. By asking the respondent to reflect only on their last trip taken more than 50 miles from home, a random selection of reported trips was expected. This expectation was based on the trips that are most frequently taken are then those that are most frequently reflected upon. Figure 11 shows that across each quarter<sup>7</sup>, overnight trips for recreation/vacation/pleasure were reflected on about half the time. However, by adding up all reported trips, the proportion of trip types should be more proportionately distributed as previously shown in Figure 2. This discrepancy potentially suggests that respondents were eager to share their more exciting trips on the survey. This eagerness has the potential to distort results from the recall trip when attempting to characterize all trips taken. As such, care should be taken when attempting to extrapolate the results of the reported trips to the broader set of all trips.

<sup>7</sup> Q1=January-March; Q2=April-June; Q3=July-September; Q4=October-December.

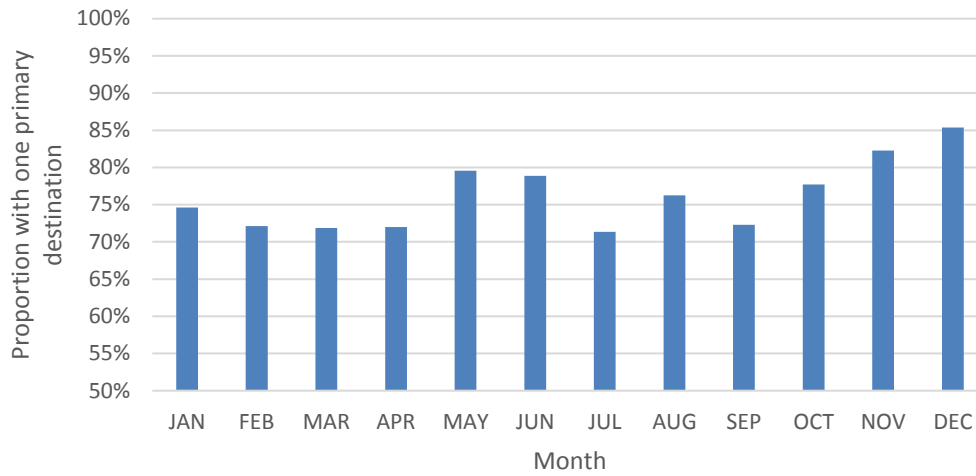
**Figure 11. Trip type proportion reflected upon by respondents.**



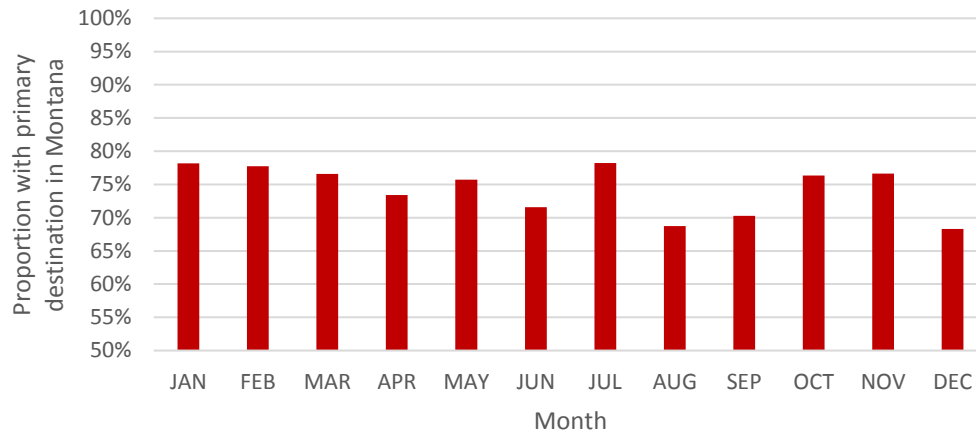
### Destinations

Just as travelers on long distance trips have a variety of purposes for their travels as shown above, they also possess a variety of destinations. Respondents were asked to indicate whether their travels had a single primary destination, or whether they had multiple destinations they planned to visit. In recalling their most recent long distance trip, the majority of respondents in each month indicated they had a single destination (Figure 12). Additionally, a large majority of primary destinations were in Montana (Figure 13).

**Figure 12. Proportion of respondents with a single destination.**



**Figure 13. Proportion of respondents with primary destination in Montana.**

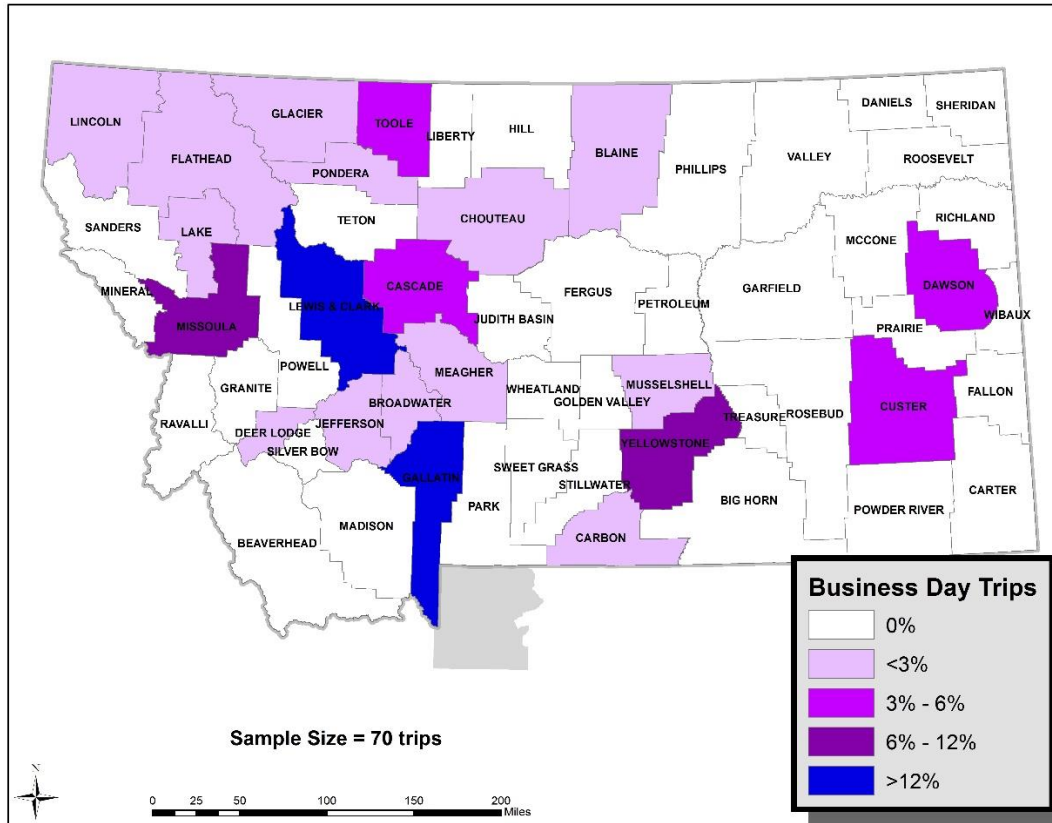


### *Day Trip Destinations*

As should be expected, day trips for business by respondents are heavily concentrated towards the state's four major urban areas, with roughly a quarter of all trips with a single primary destination headed for Lewis & Clark County (25.7%) and Gallatin County (12.9%) (Figure 14). Yellowstone and Missoula counties each accounted for 10 percent of primary destinations for business day trip volume. The central location of Lewis & Clark County, primarily Helena, relative to the urban centers of Missoula, Great Falls, and Bozeman likely contributes to its dominance as a primary business destination.<sup>8</sup> Single destination day trips for business were the least reported day trip type (n=70), and thus results here should be used with caution; nevertheless, these trip types can be observed to be the least geographically diverse of all types. Thirty five counties have no recorded observations as a primary destination.

<sup>8</sup> 2017 was also a Legislative year for the Montana State Legislature which convenes in Helena.

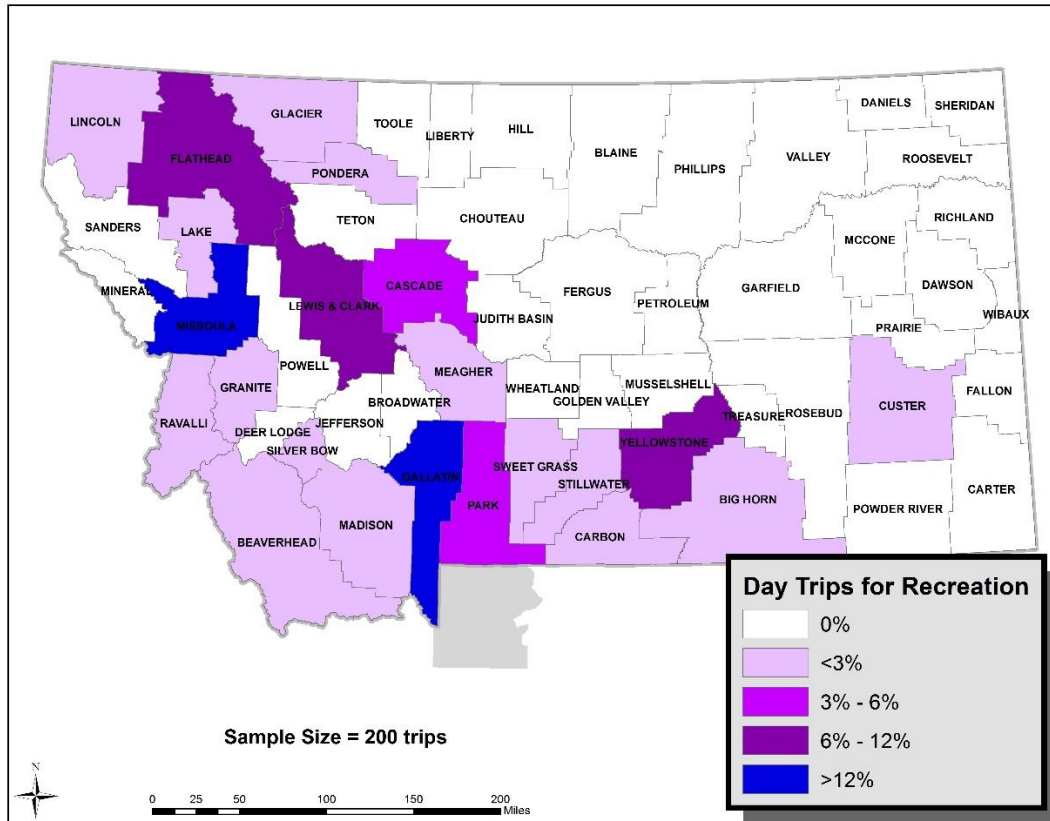
Figure 14. Proportion of identified primary destinations for business day trips.



Day trips for recreation, vacation, or pleasure were the most frequently recorded purpose of single destination day trips (n=200) (Figure 15). Thirty two counties received at least one record of a visit; however, the geographic distribution of day trips for recreation is heavily skewed towards the western counties. Missoula County recorded the highest portion, with 17.5 percent of trips, followed by Gallatin at 14 percent. Flathead County and Lewis & Clark County each garnered 9.5 percent. As observable in the all-white, unshaded northeast corner of Figure 15, the Missouri River Country travel region received no observations out of the 200 day trips for recreation. This is likely reflective of both the limited number of respondents from that region as well as the necessary distance required by residents in other areas to get to the region and back home in a day.

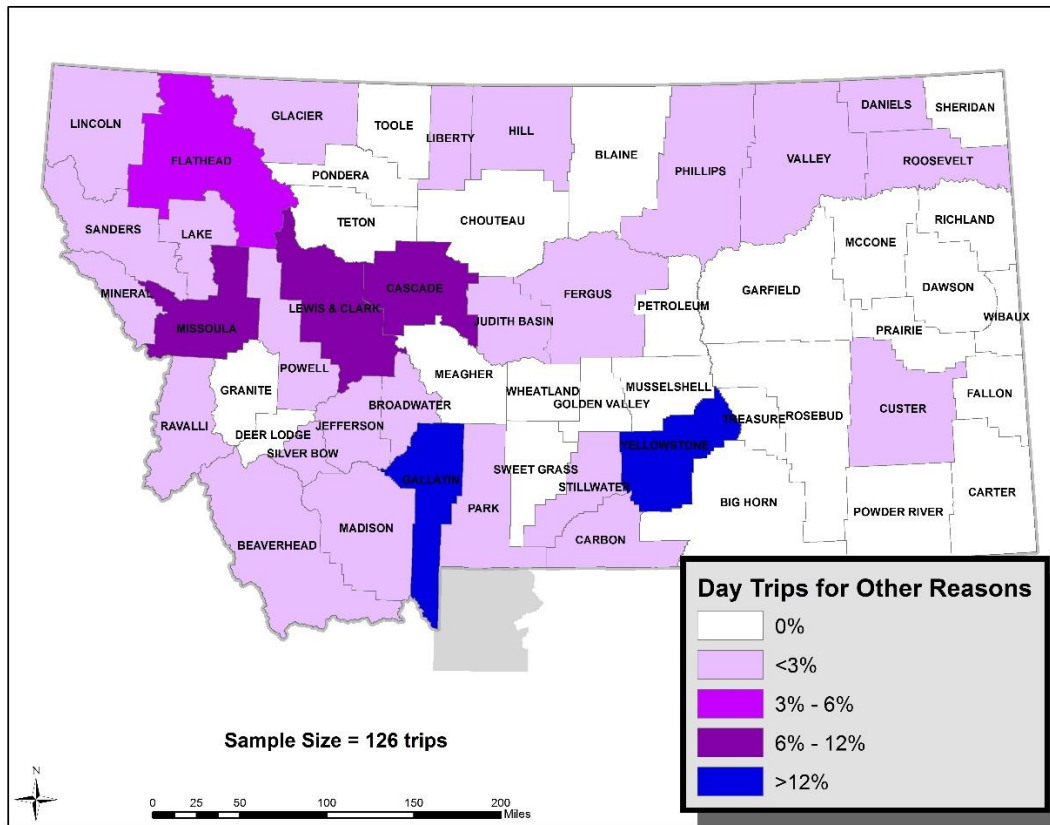


Figure 15. Proportion of identified primary destinations for recreation day trips.



Day trips with a single destination for other reasons possesses a wide geographic distribution (Figure 16). Thirty-one counties were reached by these day trippers, and unlike the recreation trips, they dispersed their travels across the state. Yellowstone and Gallatin Counties were the most cited primary destination for 'other reason' day trips, each collecting 20.6 percent of the 126 recorded trips.

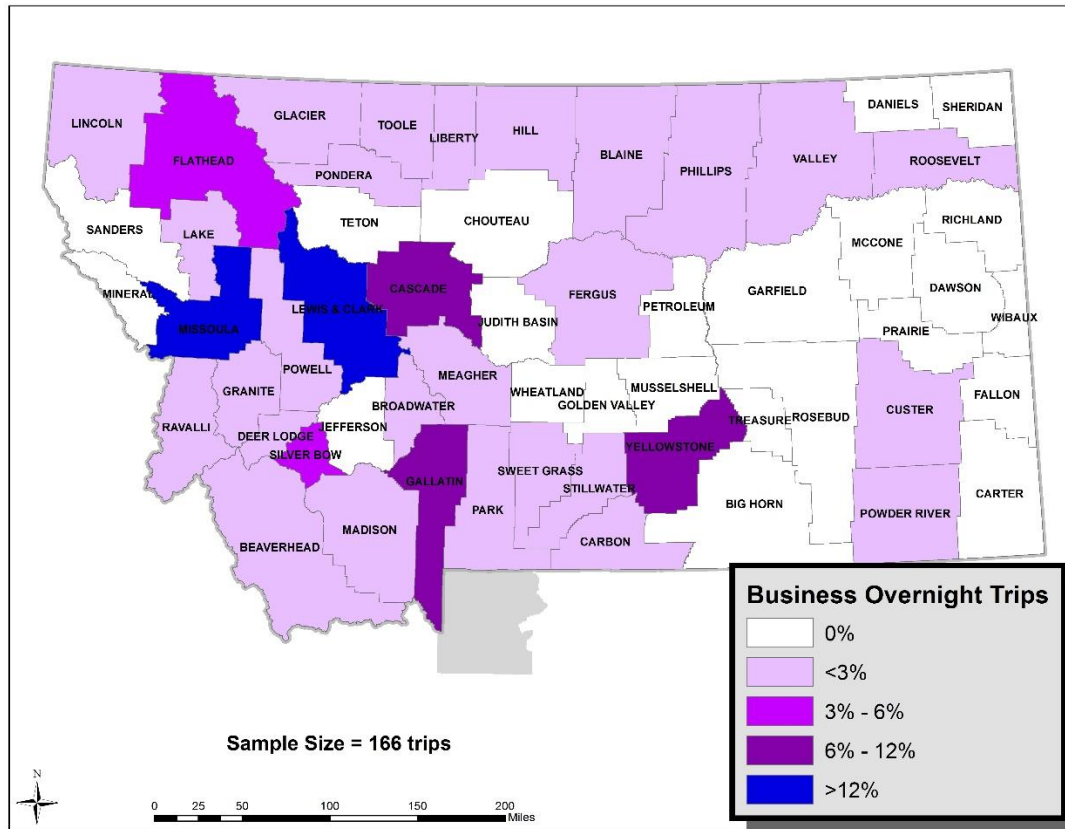
Figure 16. Proportion of identified primary destinations for other day trips.



### Overnight Trip Destinations

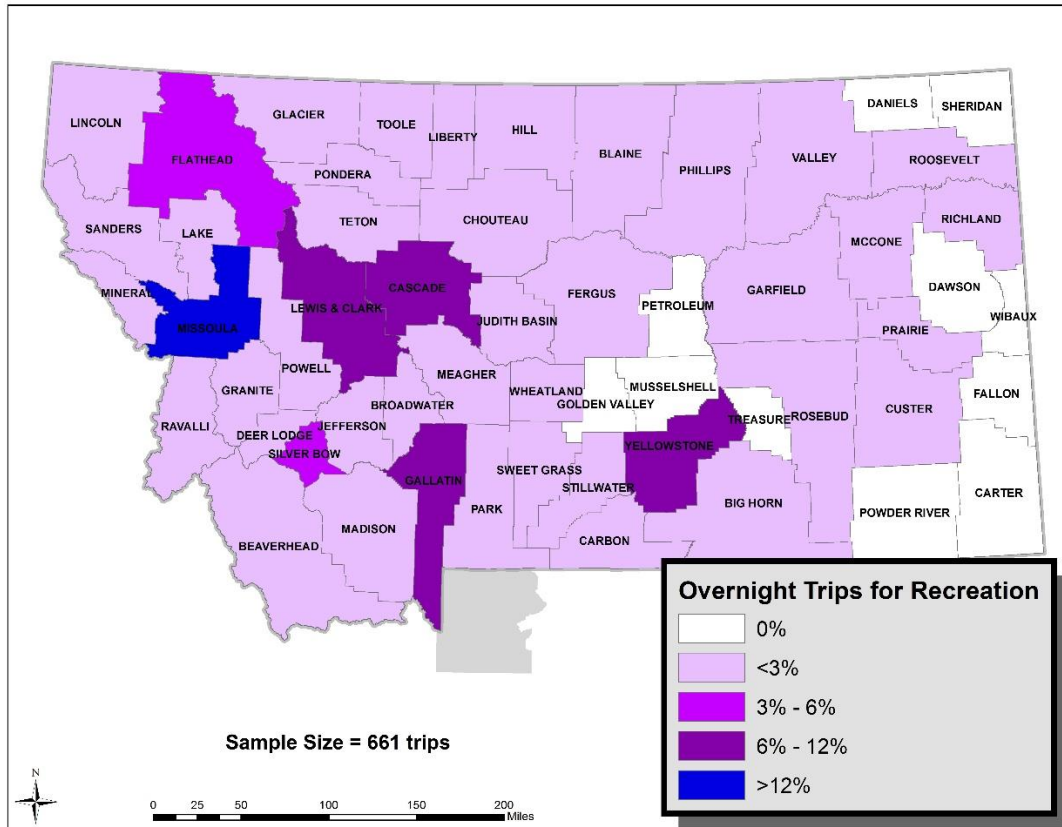
Similar to its day trip counterpart, overnight trips for business (n=166) (Figure 17) are heavily concentrated to the urban areas; however, Missoula County (16.9%) overtakes Lewis & Clark County (13.3%) as the primary destination. Yellowstone County rounds out the top three business overnight destinations at 11.4 percent. Unlike business day trips, overnights are more dispersed, reaching a higher number of counties along the Hi-Line.

**Figure 17. Proportion of identified destinations for business overnight trips.**



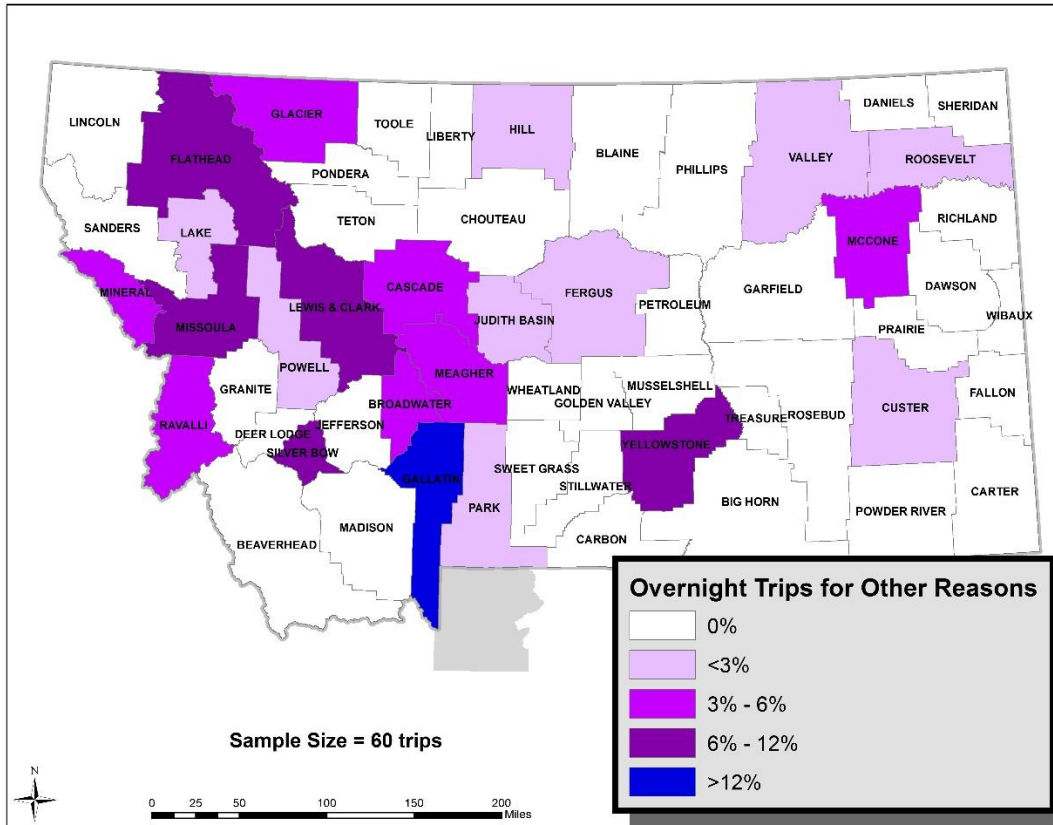
Day trips for recreation were previously noted to be highly concentrated in the western counties. Overnight recreation (n=661) generates a different story. While Missoula County remains the top primary destination with 19.4 percent, all but 11 counties were identified at least once as a primary destination (Figure 18). This observation, combined with that of recreation day trips, suggests recreation demand by residents in Montana is geographically dispersed so long as ample time (days) is available to reach the more remote areas.

Figure 18. Proportion of identified destinations for recreation overnight trips.



Overnight trips for other reasons generated significantly fewer reports than either business or recreation overnights (n=60) (Figure 19). Gallatin County remains at the top of the list of primary destinations at 13.3 percent. Overnights showed to be more concentrated in their primary destination than did day tips for other reasons.

Figure 19. Proportion of identified destinations for other overnight trips.

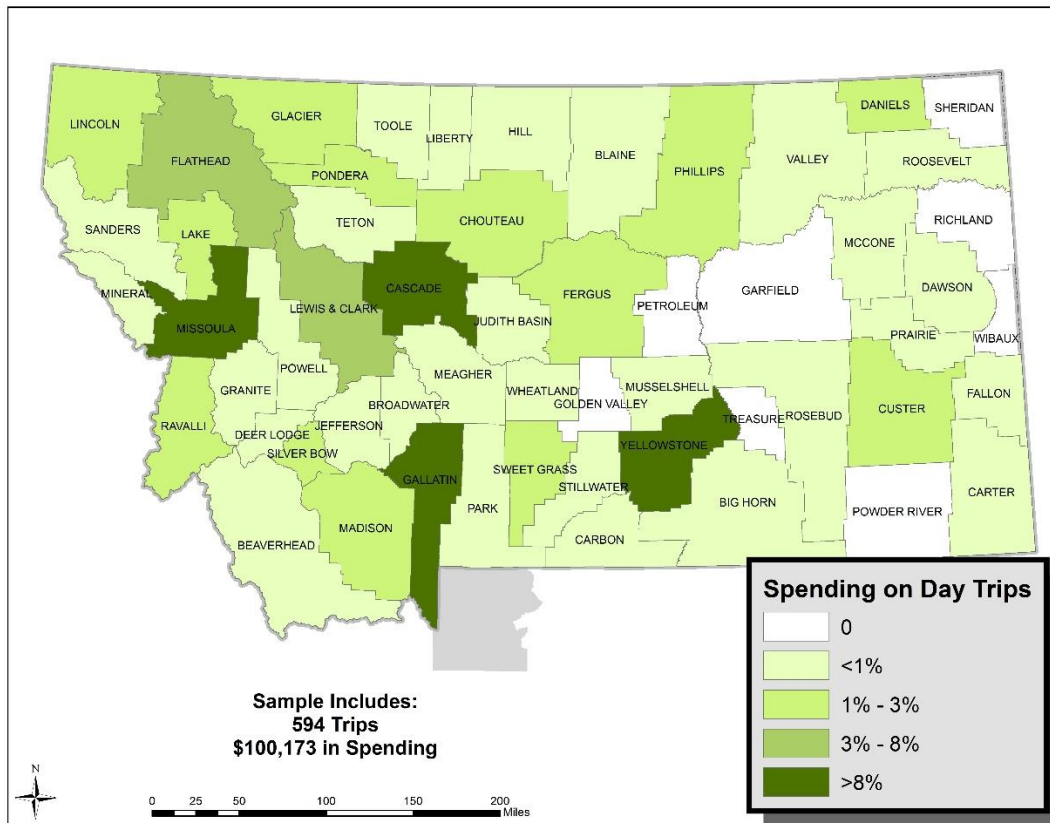


## Trip Spending

### Day Trips

Despite all counties not being identified as a primary destination for day trips of any type, nearly every county does collect a portion of the spending from these trips. Figure 20 shows the proportional distribution of the \$100,173 in spending from the 594 day trips recorded. These trips represent all day trips, not just those with a single, identifiable destination as discussed in the previous section. As should be expected, those counties which were identified as primary destinations received larger portions of spending. Yellowstone (15.3%) and Gallatin (15.2%) Counties lead all destination in total spending.

Figure 20. County proportions of all day trip spending.



On average, day tripping Montanans on the panel spent \$163.20 per trip (Table 6). Spending on trips for ‘other reasons’ exceeds that of either business or recreation by at least \$100. This difference is largely attributable to retail and grocery purchases. Given the vastness of Montana and relatively few large towns, the necessity for many residents to travel more than 50 miles for major shopping trips (retail or grocery) is a likely major contributor to this observation.

A deeper look at grocery spending reveals spending is highly concentrated in only a few counties. Yellowstone (28.2%) and Gallatin (27.4%) each garner more than a quarter of all reported spending. Retail spending yields similarly concentrated results, though Cascade County tops the spending at 23 percent, followed by Missoula County at 18 percent. Fuel purchases present a different picture in generating wider array of spending across counties. Missoula County tops the list at only 15 percent.

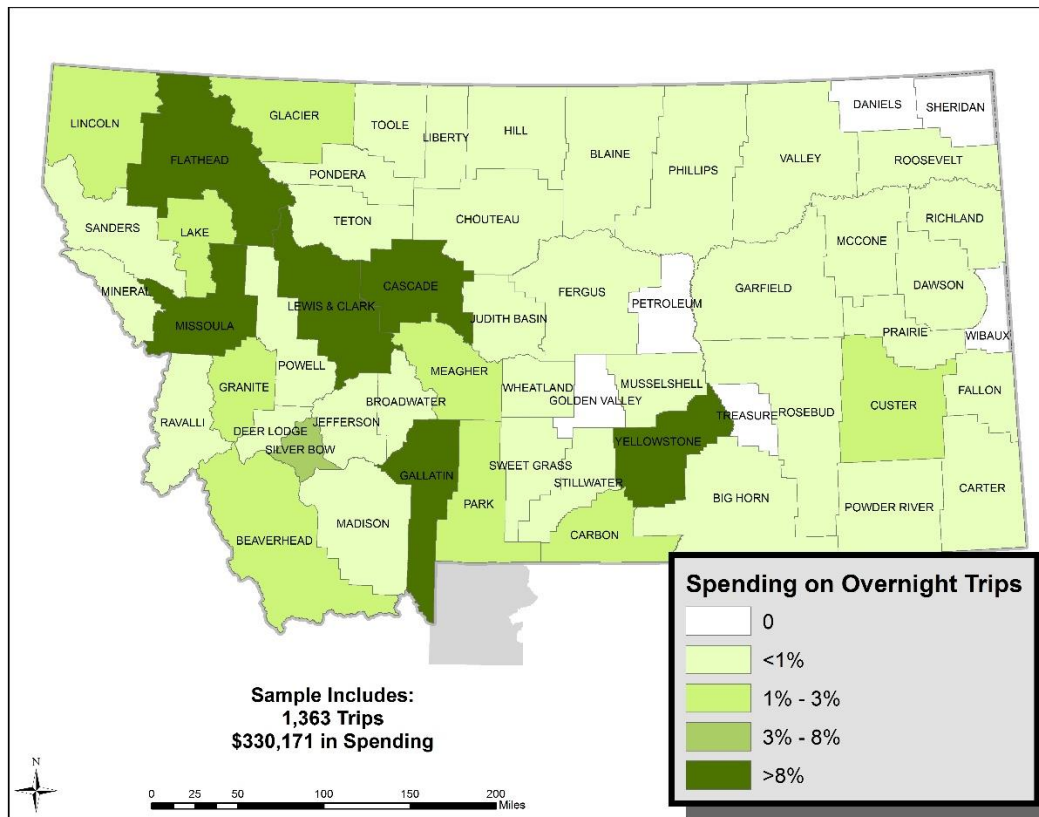
**Table 6. Day trip spending by category and trip type.**

	Business	Recreation	Other	Total
<b>Trips Reported</b>	96	290	208	594
<b>Fuel</b>	\$28.53	\$26.70	\$27.73	\$27.36
<b>Lodging</b>	-	-	-	-
<b>Restaurant/Bar</b>	\$19.39	\$24.49	\$22.81	\$23.08
<b>Groceries</b>	\$11.99	\$21.71	\$71.75	\$37.66
<b>Retail</b>	\$65.85	\$39.86	\$101.98	\$65.81
<b>Services</b>	\$4.96	\$9.80	\$10.58	\$9.29
<b>Total</b>	<b>\$130.72</b>	<b>\$122.57</b>	<b>\$234.85</b>	<b>\$163.20</b>

### Overnight Trips

Respondents reported \$330,171 across 1,363 overnight trips, with the vast majority of trips reported falling in the recreation category. Though all but six counties received at least some spending, the majority of spending was concentrated in six counties (Missoula – 14.6%, Yellowstone – 13.8%, Gallatin – 13.2%, Flathead – 8.6%, Cascade – 8.4%, and Lewis & Clark – 8.2%) (Figure 21).

**Figure 21. County proportions of all overnight trip spending.**



On average, respondents spent \$242.24 on their overnight trips (average of 2.66 nights) in Montana. Unlike day trips that were dominated by heavy spending of trips for other reasons, business overnight travelers spent the most per trip. The high business travel spending is significantly driven by lodging, as they spend an average of \$111.55 on lodging. Remaining spending categories are rather similar across trip type.

Similar to heavy concentrations observed in day trips for other reasons, overnight trips for business show little diversity in spending location. Missoula (16.2%), Lewis & Clark (15.3%), and Yellowstone (14.7%) Counties dominate lodging spending by respondents.

**Table 7. Overnight trip spending by category and trip type.**

	Business	Recreation	Other	Total
<b>Trips Reported</b>	240	1,026	97	1,363
<b>Fuel</b>	\$41.61	\$47.32	\$40.25	\$45.81
<b>Lodging</b>	\$111.55	\$60.35	\$32.92	\$67.41
<b>Restaurant/Bar</b>	\$45.38	\$49.25	\$39.65	\$47.89
<b>Groceries</b>	\$18.35	\$29.74	\$37.40	\$28.28
<b>Retail</b>	\$45.84	\$38.37	\$57.20	\$41.03
<b>Services</b>	\$5.85	\$13.73	\$6.45	\$11.82
<b>Total</b>	<b>\$268.58</b>	<b>\$238.76</b>	<b>\$213.87</b>	<b>\$242.24</b>

### Trip Activities

In addition to reporting where they traveled, and how much they spent, panel respondents also recorded their various activities from their most recent long distance trip in the previous month. Respondents were provided a list of 41 activities from which to identify those that they participated in. From this list, several key outdoor recreation activities rose above all else. The top five outdoor activities are shown in Figure 22. These panelists reported the same top five outdoor activities as reported by nonresident visitors to the state.<sup>9</sup> As could be expected, camping, hiking, photography, and wildlife watching have distinctive bell shapes with peaks occurring in the summer months. Scenic driving remain the most frequently cited activity throughout the year, even with a noticeable decline after September.<sup>10</sup>

In addition to the outdoor activities, panelists identified several clear major cultural and other activities in which they participated (Figure 23). Highest among these were recreational shopping and dining as a special activity. Refer to Appendix C for a complete list of all activities.

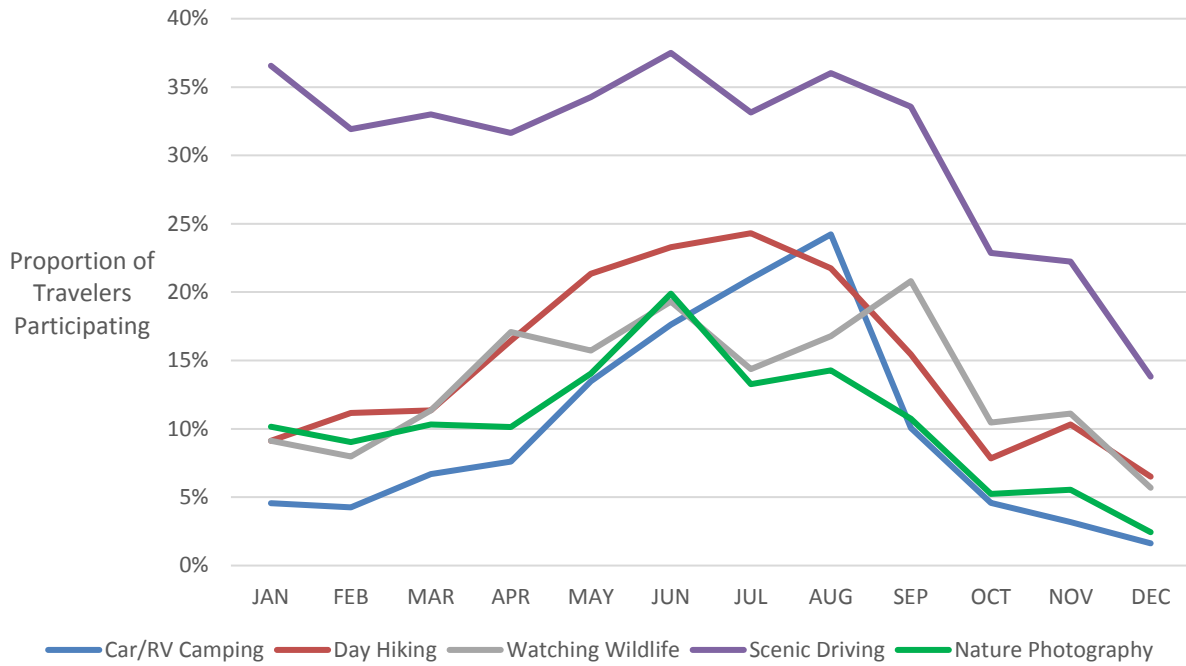
<sup>9</sup> 2017 ITRR nonresident survey results, <http://www.tourismresearchmt.org/>, Scenic Driving (56%), Day Hiking (36%), Wildlife Watching (34%), Nature Photography (29%), Car/RV Camping (26%)

<sup>10</sup> To check for any distortion of the results due to attrition or nonresponse, a comparison of Figure 22 was made to data only generated based on those 119 participants who completed all surveys. We determined that there is insufficient evidence to suggest that those answering all 12 surveys are significantly different than all others.

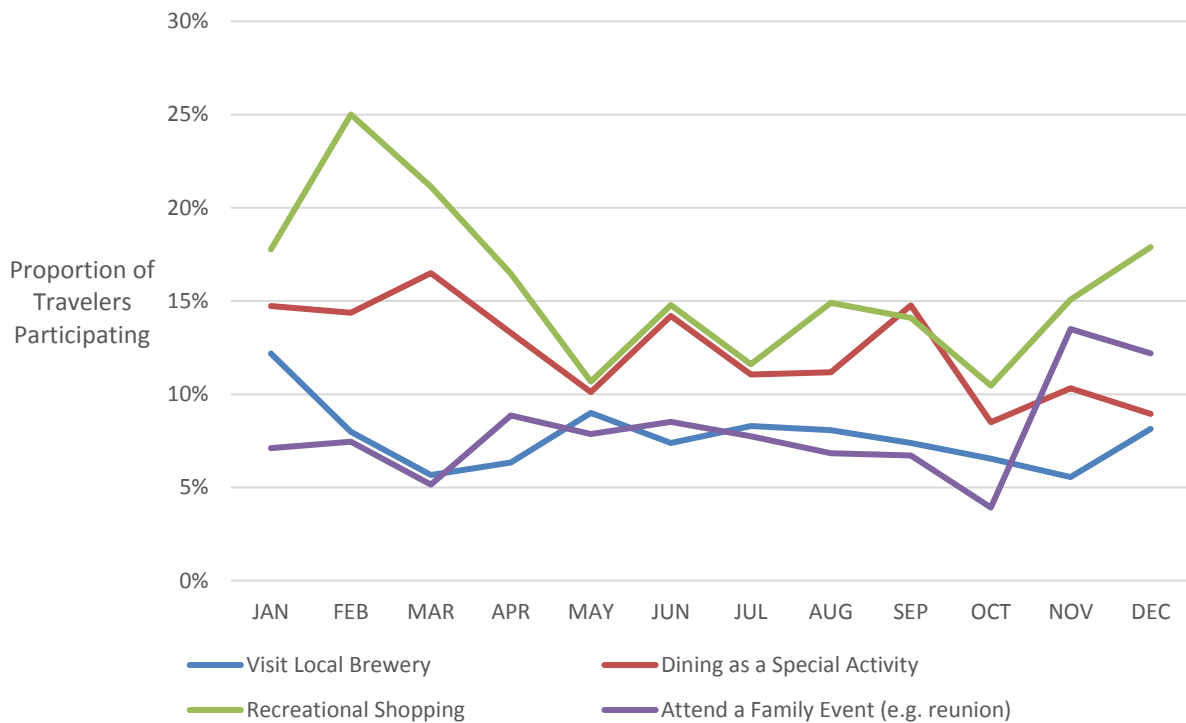


# A Longitudinal Study of Montanans' Intrastate Travel 2018

**Figure 22. Rate of participation in outdoor activities by those who traveled.**



**Figure 23. Rate of participation in other activities by those who traveled.**



## Conclusions

This study was designed to track a subset of Montanans in their travels 50 miles or more from home for an entire year to provide a snapshot of household travel for each month. While the data should not be generalized to the full Montana population, it provides significant detail about Montanans who travel within the state.

The Outdoor Industry Association suggests that 81 percent of Montanans participate in outdoor recreation every year.<sup>11</sup> This report, based on a panel of nearly 300 Montanans, takes this observation one step further and identifies that not only do a large portion of Montanans engage in recreation, but they do so often and frequently travel throughout the state to do so. This intrastate travel for recreation and pleasure thus contributes significantly to the economies within the state. Similar to visitors coming to the state for recreation, many Montanans travel during the summer months. In fact, more than half of all respondents indicated they took an average of about 1.75 overnight recreation trips in each of June, July, and August.

Montanans report enjoying and participating in what the state has to offer much the same way visitors do. Highest among outdoor activities of residents in the panel was scenic driving, with roughly one-third of all respondents taking part in any given quarter. Respondents are also frequent hikers and campers during the summer months with about a fifth taking part.

Not only did the Montana respondents in the panel frequently travel for recreation, but the necessity to travel more than 50 miles for other reasons like shopping, dining, and medical appointments further pulls residents and their dollars beyond their communities. These travels not only serve the destinations receiving this travel, but also those communities in between as travelers make stops for food, fuel, and recreation. This report and its accompanying resident state wide intercept survey demonstrate the importance of remembering that Montanans are frequently tourists in our own back yard throughout the year, thus ensuring sufficient private and public travel infrastructure is vital to maintaining quality of life in Montana.

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<sup>11</sup> [https://outdoorindustry.org/wp-content/uploads/2017/07/OIA\\_RecEcoState\\_MT.pdf](https://outdoorindustry.org/wp-content/uploads/2017/07/OIA_RecEcoState_MT.pdf)

## Appendix A: Survey instrument – Invitation to Participate

### Introductory Email

From: ITRR                      Reply-To Email: [itrr@umontana.edu](mailto:itrr@umontana.edu)

Subject: Montana Resident Panel Survey

Dear Montana Research Panel Member,

The Institute for Tourism and Recreation Research is interested in exploring how often, where, and what types of travel Montana residents do within the state. For this project, we are conducting a study where you will be asked to fill out a survey every month, for the next 12 months about your recent travel. Respondents who are willing to complete the survey each month will be entered into a drawing in January 2018 to win one of three prizes: one drawing for a \$1,000 Visa Gift card and two drawings for \$250 Visa Gift card.

We hope you are willing to assist in this very important Montana Study. Please click on the link below and let us know whether you wish to participate. As in all research by ITRR, your responses are confidential. The data is only used in the aggregate level.

Thank you for your time today and with all our panel research.

**Follow this link to the Survey:**

[\\${://SurveyLink?d=Take the survey}](#)

Or copy and paste the URL below into your internet browser:

[\\${://SurveyURL}](#)

Follow the link to opt out of future emails:

[\\${://OptOutLink?d=Click here to unsubscribe}](#)

Jeremy Sage  
Economist & Associate Director ITRR  
[jeremy.sage@umontana.edu](mailto:jeremy.sage@umontana.edu)

## Questionnaire

Q1 Thank you for your time today. Even if you believe you don't travel much, you are still very important to the study. There will likely be one or more months that you didn't travel 50 miles or more away from home at all and some months that you travel one or more times. The point we are trying to make is that every household in Montana is different in their travel frequencies and type of travel. Without your input EACH month, we won't be able to fully understand all travel for recreation/vacation, business, or other types of travel reasons. Please seriously think about this important study and join us as a participant. Thank you.

Q2 Are you willing to participate in the 12-month study on Montana resident travel? (You will receive a survey at the beginning of each month.)

- I want to participate.
- I do not want to participate.

*Skip To: End of Survey If = I do not want to participate.*

Q3 In which Montana County do you permanently reside?

▼ Beaverhead ... Yellowstone

Q4 What is your zip code?

\_\_\_\_\_

Q5 Do you live within a city limit?

- Yes
- No

Q6 How many people currently live in your household?

- 1 person
- 2 people
- 3 people
- 4 people
- 5 people
- 6 people
- 7 people
- 8 people
- 9 people
- 10 or more people

Q7 What is your age?

\_\_\_\_\_

Q8 What best describes your employment status?

- Retired (not working for pay)
- Employed full-time
- Employed part-time year-round
- Seasonal employment (non-student)
- Student (not employed)
- Student (employed during school or seasonally such as summer)
- Not employed outside the home and not of retirement age

Q9 What best describes your annual household income?

- Less than \$25,000
- \$25,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$149,999
- \$150,000 - \$199,999
- \$200,000 or greater

Q10 What is YOUR highest completed level of education?

- Less than high school
- High school or GED
- Associated, Trade, or Certificate
- Undergraduate degree
- Advanced degree (M.S., Ph.D., J.D., M.D.)

Q11 Thank you for agreeing to take part in our resident travel survey. You will be receiving your first travel survey in the coming weeks. Please click >> to finish and record your responses. Thank You!!

## Appendix B: Survey instrument – Monthly Questionnaire<sup>12</sup>

### Introductory Email

From: ITRR                      Reply-To Email: [jeremy.sage@umontana.edu](mailto:jeremy.sage@umontana.edu)

Subject: Montana Resident Travel Survey – Month Travel

Dear Montana Research Panel Member,

Thank you for agreeing to participate in ITRR's year-long study on Montana Resident Travel. We are interested in exploring how often, where, and what types of travel Montana residents do within the state. The attached survey is the ## of twelve you will receive throughout the year. Remember, respondents who complete the survey each month will be entered into a drawing in January 2018 to win one of three prizes: one drawing for a \$1,000 Visa Gift card and two drawings for \$250 Visa Gift cards.

Again, we greatly appreciate your willingness to assist in this very important Montana Study. Please click on the link below to begin your **Month Travel** survey.

Thank you for your time today and with all our panel research.

**Follow this link to the Survey:**

[\\${!://SurveyLink?d=Take the survey}](#)

Or copy and paste the URL below into your internet browser:

[\\${!://SurveyURL}](#)

Follow the link to opt out of future emails:  
[\\${!://OptOutLink?d=Click here to unsubscribe}](#)

Sincerely,  
Jeremy Sage  
ITRR Economist & Associate Director

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<sup>12</sup> Note: Where Month or ## appear in the email or survey, the proper month was inserted for each of the 12 surveys.

## Questionnaire

**1** Thank you for agreeing to take part in the Monthly Montana Resident Travel Survey for 2017. **For this survey, please think only about your travel for the month of MONTH, 2017.** This survey will take you 10-15 minutes to complete if you traveled during this month. We greatly appreciate your time and effort to provide valuable information about resident travel in Montana. Your responses are confidential and will be reported only in the aggregate.

**Q2** Did you take any day or overnight trips 50 miles or more away from home in Month of 2017 (including shopping, business, vacation, etc.)?

- Yes
- No

*Skip To: End of Survey If = No*

**Q3** Please think about the following types of trips and record the number of trips you took during Month of 2017. If one of your trips had combined purposes (e.g. business and vacation), please select only one type of trip - the main purpose.

**Q4** How many **overnight business trips** did you take in Month 2017?

▼ 0 trips ... More than 15 trips

**Q5** How many **day-trips for business** did you take in Month 2017?

▼ 0 trips ... More than 15 trips

**Q6** How many **overnight trips for recreation/vacation/pleasure** did you take in Month 2017?

▼ 0 trips ... More than 15 trips

**Q7** How many **day-trips for recreation/vacation/pleasure** did you take in Month 2017?

▼ 0 trips ... More than 15 trips

**Q8** How many **overnight trips for any other reason (medical, shopping, etc.)** did you take in Month 2017?

▼ 0 trips ... More than 15 trips

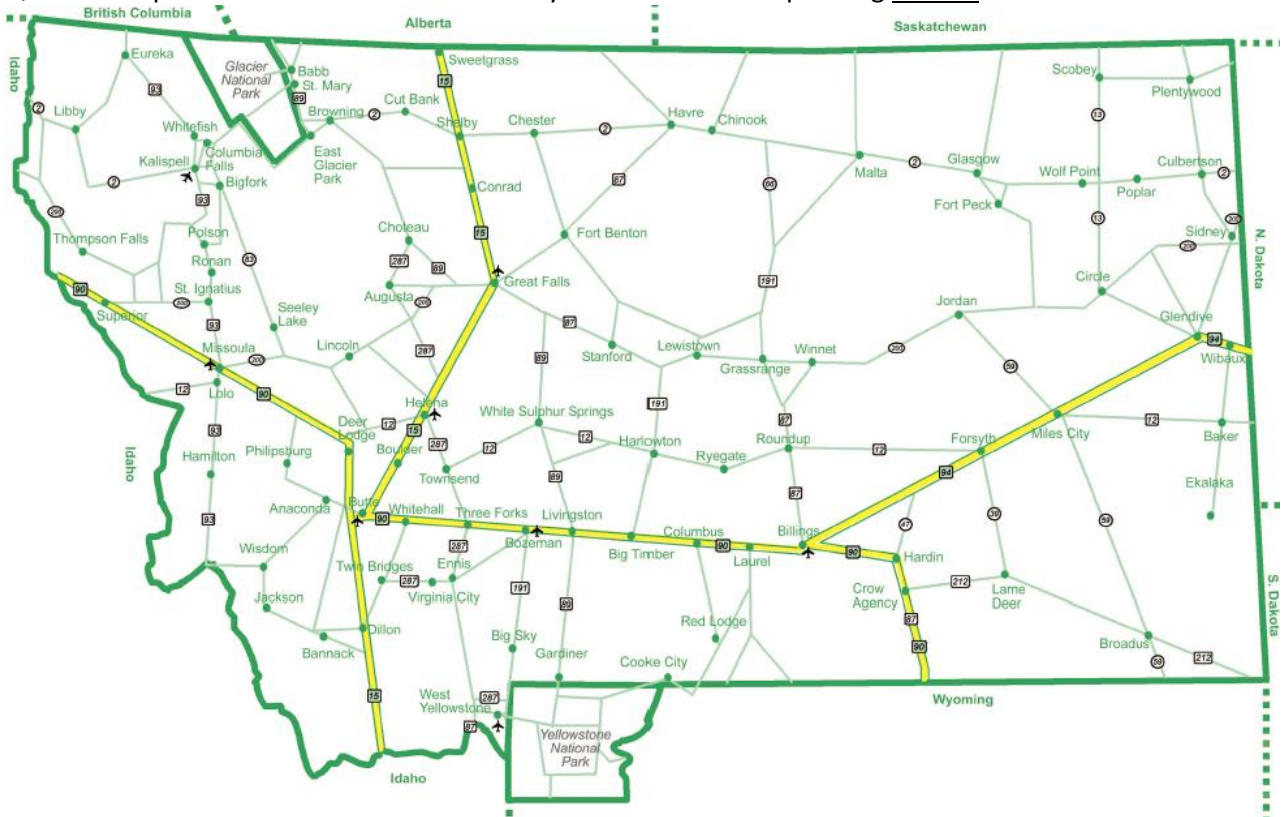
**Q9** How many **day-trips for any other reason (medical, shopping, etc.)** in Month 2017?

▼ 0 trips ... More than 15 trips



**Q10** For the following questions, please think of only the one most recent trip from the month of Month 2017. If your most recent trip was out of the state of Montana, we are still interested in hearing about the time you spent in Montana while on that trip. The questions below refer only to the one trip you are thinking about.

**Q11** This map is to be used as a reference for your most recent trip during Month of 2017.



**Q12** Which type of trip are you thinking about?

- Overnight trip for business
- Day-trip for business
- Overnight trip for recreation/vacation/pleasure
- Day-trip for recreation/vacation/pleasure
- Overnight trip for any other reason (medical, shopping, etc.)
- Day-trip for any other reason (medical, shopping, etc.)

**Q13** How many nights did you spend away from home, but in Montana, while on that trip?

▼ 0 nights ... 30 nights

**Q14** Some travelers have multiple destinations for one trip while others have one primary destination they are visiting. On this trip, did you have multiple destinations or one primary destination?

- One primary destination.
- Multiple destinations on the same trip.

**Q15** For this trip, was your primary destination(s) in Montana or in another state/location?

- My primary destination(s) was in Montana.
- My primary destination(s) was NOT in Montana.

**Q16** How many adults (18 years of age or older) were in your travel group on that trip including yourself? \_\_\_\_

**Q17** How many children under 18 years of age were in your travel group on that trip including yourself? \_\_\_\_

**Q18** What mode(s) of travel did you use in Montana on that trip?

- Car/truck
- RV/Trailer/Camper
- Motorcycle
- Bicycle
- Airplane
- Bus

*Display This Question:*

*If What mode(s) of travel did you use in Montana on that trip? = Airplane*

**Q19** What Montana airport(s) did you fly into/out of?

- Missoula
- Billings
- Bozeman
- Kalispell
- Great Falls
- Butte
- Helena

**Q20 While at home preparing for this trip, how much money did you spend in each category?**

	<b>Amount Spent (\$)</b>
<b>Gasoline/fuel</b>	
<b>Groceries/snacks</b>	
<b>Retail goods</b>	
<b>Services (fees, admissions, rentals, etc.). Please describe the service below.</b>	

**Q21** For the next questions, we want to know about purchases you made while on this most recent trip during *Month* of 2017. This trip may have been outside of Montana, but **please only record the purchases you made while still in Montana**. Select the number of Montana towns you spent money in on your most recent trip and record the purchases within each town.

**Q22** In how many Montana towns/locations did you spend money on your most recent trip during *Month* of 2017? **(Please include towns/locations en route and at your destination(s).)**

▼ 0 towns... 10 towns/locations

**Q23** What was the first Montana town/location you spent money in on your most recent trip in *Month* of 2017? \_\_\_\_\_

**Q24** Please record below the amount spent in each category for town/location #1. (Please round to the nearest dollar.)

	<b>Amount Spent (\$)</b>
<b>Gasoline/fuel</b>	
<b>Lodging/camping</b>	
<b>Restaurant/bar</b>	
<b>Groceries/snacks</b>	
<b>Retail goods</b>	
<b>Services (fees, admissions, rentals, etc.). Please describe the service below.</b>	

NOTE: Q23 & Q24 was repeated for as many as 10 towns depending on the value identified in Q22.

**Q43** Are there any other purchases in Montana during your trip in *Month* of 2017 that we did not ask you about?

\_\_\_\_\_  
\_\_\_\_\_

**Q44** Please select **all** of the activities you participated in while on your most recent trip **while in Montana** during Month of 2017.

**Q45** Outdoor Land-based Recreation Activities:

- Car/RV Camping
- Day hiking
- Backpacking
- Horseback riding
- Nature photography
- Hunting
- Birding
- Watching wildlife
- Geocaching
- Rock climbing
- Bicycling
- Mountain biking
- Road/tour cycling
- Rock hounding
- Golfing
- Motorcycle touring
- OHV/ATV
- Scenic driving

**Q46** Water-based Recreation Activities:

- Motor boating
- Canoeing/Kayaking
- Fly fishing
- Other fishing
- River rafting/floating
- Visit hot springs

**Q47** Winter Recreation Activities:

- Snowmobiling
- Skiing/snowboarding
- Cross country skiing
- Snowshoeing
- Ice fishing

**Q48** Culture or Art Activities:

- View art exhibits
- Attend festivals/special events
- Attend performing arts
- Visit farmers markets
- Visit Indian Reservations
- Visit Lewis & Clark Sites
- Visit other historical sites
- Visit ghost towns
- Visit museums
- Visit local brewery
- Visit local distillery
- Dining as a special activity

**Q49** Other Activities:

- Attend/participate in sporting event
- Recreational shopping
- Visit dinosaur attractions
- Attend a wedding
- Attend a family event (e.g. reunion)

**Q50** Please provide any additional comments that will help us understand the trip better.

---

## Appendix C: Activity Participation Rates by Travelers

Activity	Q1	Q2	Q3	Q4
Scenic Driving	34%	35%	34%	20%
Recreational Shopping	21%	14%	13%	14%
Dining as a Special Activity	15%	13%	12%	9%
Day Hiking	11%	21%	21%	8%
Nature Photography	10%	15%	13%	4%
Watching Wildlife	9%	17%	17%	9%
Visit Local Brewery	9%	8%	8%	7%
Attend a Family Event (e.g. reunion)	7%	8%	7%	9%
Skiing/ Snowboarding	6%	0%	0%	0%
Car/RV Camping	5%	13%	19%	3%
Visit Hot Springs	5%	3%	3%	3%
View Art Exhibits	4%	4%	4%	3%
Attend Festivals/ Special Events	4%	5%	8%	3%
Visit Other Historical Sites	4%	5%	7%	2%
Visit Museums	4%	6%	3%	2%
Birding	3%	5%	4%	1%
Cross Country Skiing	3%	0%	0%	1%
Snowshoeing	3%	0%	0%	1%
Attend Performing Arts	3%	2%	3%	1%
Visit Indian Reservations	3%	1%	3%	0%
Snowmobiling	2%	0%	0%	0%
Visit Local Distillery	2%	1%	1%	1%
Backpacking	1%	1%	2%	1%
Horseback Riding	1%	2%	3%	1%
Hunting	1%	1%	1%	9%
Bicycling	1%	2%	2%	0%
Mountain Biking	1%	1%	1%	0%
Rock Hounding	1%	2%	1%	0%
OHV/ATV	1%	1%	1%	1%
Fly Fishing	1%	3%	5%	1%
Other Fishing	1%	4%	6%	0%
Ice Fishing	1%	0%	0%	0%
Visit Farmers Markets	1%	2%	5%	1%
Visit Lewis & Clark Sites	1%	1%	2%	1%
Visit Ghost Towns	1%	2%	1%	0%
Visit Dinosaur Attractions	1%	1%	1%	0%
Attend a Wedding	1%	2%	3%	1%
Geocaching	0%	1%	0%	0%
Rock Climbing	0%	0%	0%	0%
Road/Tour Cycling	0%	0%	0%	0%
Golfing	0%	1%	1%	0%
Motorcycle Touring	0%	1%	1%	0%
Motor Boating	0%	3%	5%	0%
Canoeing/ Kayaking	0%	4%	6%	0%
River Rafting/ Floating	0%	1%	4%	0%
Attend/ Participate in a Sporting Event	0%	0%	0%	0%

