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The Montana Expression 2018: Resident Desires for MT State Park Amenities

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UNIVERSITY OF MONTANA

The Montana Expression 2018: Resident Desires for MT State Park Amenities

MT Expression Research Report 2018-10



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8/23/2018

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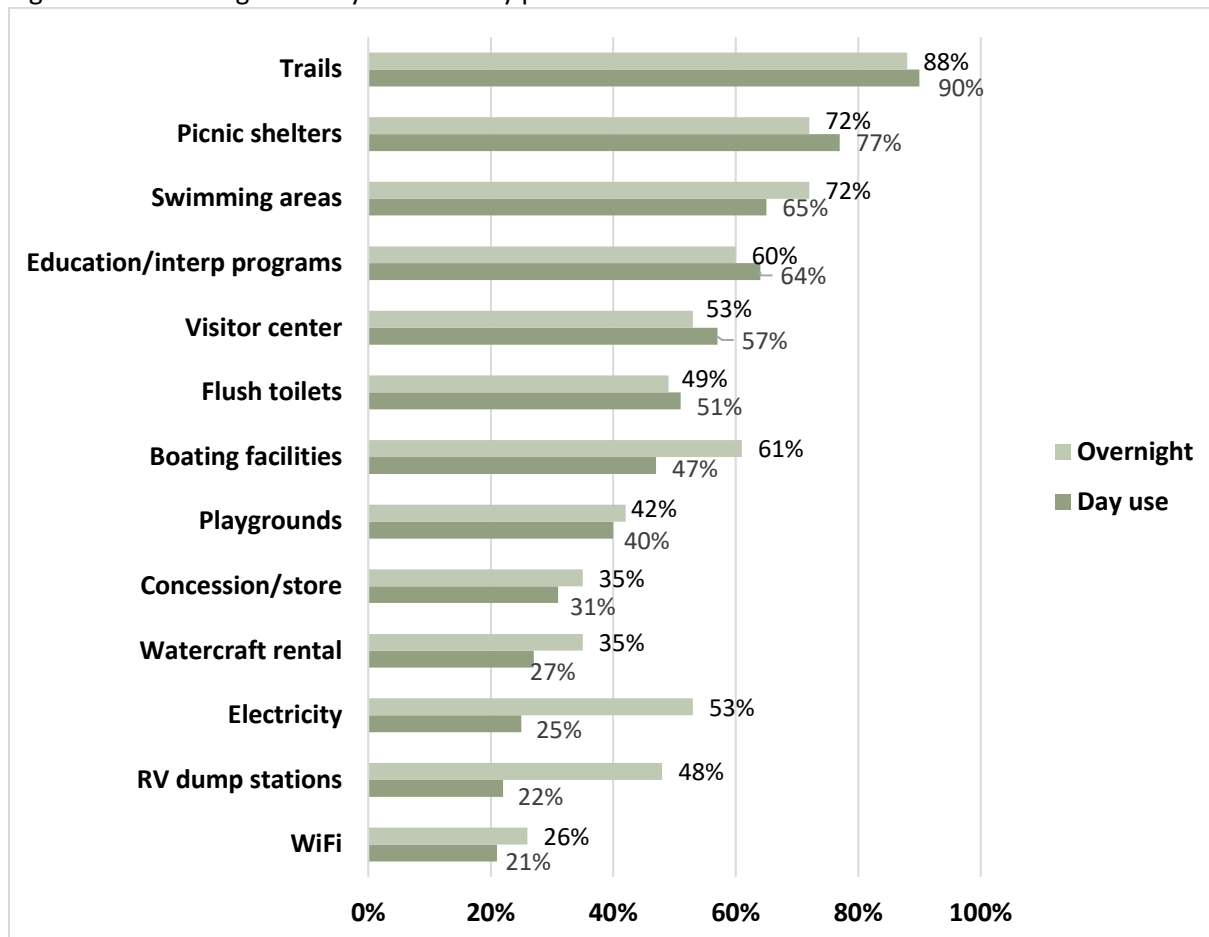
Executive Summary

Outdoor recreation is a \$7.1 billion industry in Montana according to the Outdoor Industry Association, and Montana State Parks helps contribute to Montanan’s desire to play outside through the 55 state parks around the state. This study and report was conducted to understand what amenities are desired by residents in their state parks to be used by the Parks in Focus Commission, a Governor appointed group, to assist state parks into the future.

From April through mid-June 2018, the Institute for Tourism and Recreation Research (ITRR) intercepted 6,193 Montana residents 18 and older at gas stations and rest areas around the state about their use and desires for a variety of amenities in state parks. Data was weighted by residence and gender to represent the Montana population. Results show that 22% (1,362) prefer to use state parks for overnight use, 67% (4,175) use parks for day use, and 11% (654) prefer to not use state parks. Park users visited 2.81 different state parks on average in the past year.

The top amenities desired by both day and overnight users are trails, picnic shelters, swimming areas, education/interpretive programs, and visitor centers (Figure ES-1). Overnight users are more likely than day users to desire boating facilities, electricity, and RV dump stations which seems to indicate their use of the park as more of a longer-stay or weekend destination.

Figure ES-1: Overnight vs. day use amenity preferences

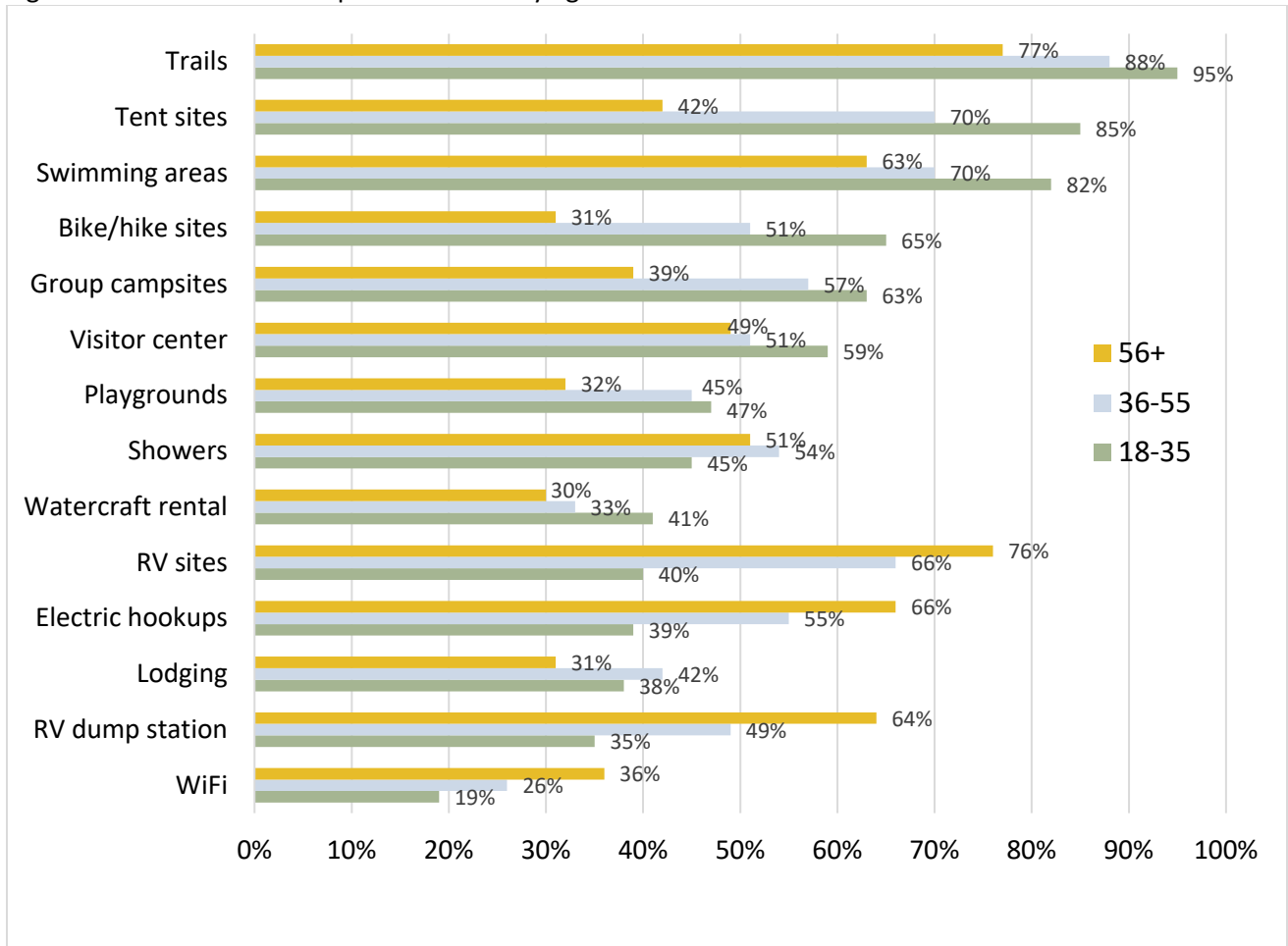


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The most obvious and significant differences in desires for amenities emerged in the analysis by age group (Figure ES-2). Looking at overnight park users ages 18-35, 36-55, and 56+, Montanans want different things based on their age. Many of these differences make common sense: older visitors are less likely to request trails, tent sites, swimming areas, bike/hike sites, group campsites, and playgrounds but these were the most popular amenities for the younger age group (18-35). The older 56+ age group are much more likely to want RV sites, electric hookups and WiFi (Figure ES-2).

The middle age category (36-55) was generally sandwiched in-between the other two groups in their desire for amenities. The only amenity this age group was higher in than the other two was a desire for showers. This ‘sandwich’ age likely represents some who still have younger children at home as well as those starting their empty-nest years, causing this age category to be more of an average.

Figure ES-2: Desire for state park amenities by age



The data showed that state parks are used by a majority of Montana residents at least once a year. Understanding the amenities they desire, especially by age category, will assist state park decision makers in what infrastructure development is needed for the future. In concert with an understanding of Montana’s population growth and age growth, state parks can strategically address the needs of Montanans and their love of the outdoors.

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Introduction

On January 12, 2018, Montana Governor, Steve Bullock established the Parks in Focus Commission as a public-private collaboration to strengthen the state park system and to ensure that the Department of Fish, Wildlife & Parks (FWP) has the resources, capacity, and expertise to implement the Montana State Parks and Recreation Strategic Plan. The Commission's role is to focus on strategies to implement three recommendations from that plan: develop diversified revenue streams, grow strategic partnerships, and build an engaged constituency for state parks.

To that end, understanding what amenities the citizens of Montana would like at their state parks is important to the overall discussion and implementation of the statewide plan for the park system.

Purpose

The purpose of this study was to assess the types of amenities that Montana residents would like to see at state parks in Montana.

Methods

Data were collected by trained surveyors who asked a few questions to Montanans as they filled up their vehicle with fuel at gas stations or who stopped at rest areas around the state. The Institute for Tourism and Recreation Research (ITRR) has permission from over 100 gas stations statewide to talk to residents in the amount of time it takes them to fill their gas tank. During 10 weeks starting in April 2018, any Montanan who stopped at gas stations or rest areas had an opportunity to be surveyed about their use of Montana State Parks. The respondent data was weighted to represent the county of residence and gender from the U.S. Census, thus providing a representative sample reflecting the geographic population and gender of the state.

Survey design

The survey was designed by personnel from the Institute for Tourism and Recreation Research in concert with staff to the Parks in Focus Commission. iPads were used by ten surveyors located around the state to collect the data. The survey was short by design (due to the amount of time available with respondents). Respondents were asked to answer yes or no to a list of amenities based on whether they were important to them or not. Two demographic data questions were asked. See appendix A for survey questions.

Limitations

This study was limited to Montana residents 18 and older who either drive or are passengers in vehicles.

Response rate

The response rate was 95% with 6,193 Montana residents responding to the survey from April through mid-June 2018.

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Results

First, results are displayed for all respondents. Following that, differences in responses will be discussed by age category and by those residing in the mountains or plains (west or east) of Montana.

All Montana respondents

The average age for respondents was 46.31 years old with a spread from 18 to 95 (Figure 1). Thirty-seven percent of respondents had children under 18 in their household. Residence respondents mirror the population of the state as shown by travel region in Montana (Figure 2).

Figure 1: Respondent age

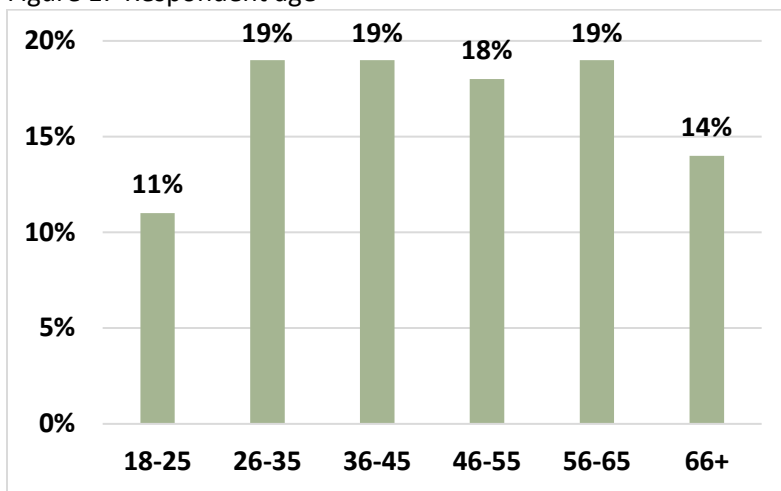
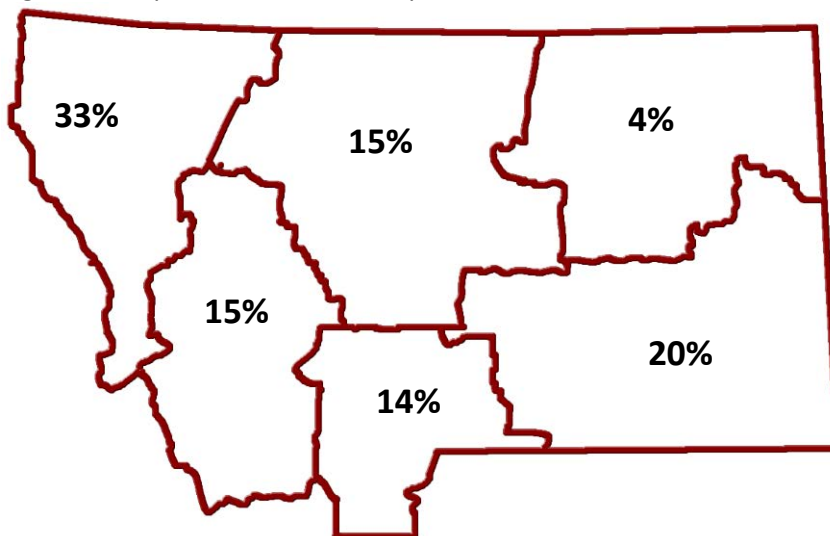


Figure 2: Respondent residence represented within each Montana travel region



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Nearly 9 in 10 Montanans visit state parks. Most (67%) visit state parks for day use (Figure 3). Just over half of Montanans visited a state park in the past 12 months (Figure 4). More than one-third of state park visitors visited only one particular state park in the past 12 months. The average number of different state parks Montanans visited in the past 12 months was 2.81 parks (Figure 5).

Figure 3: Type of state park that Montanan’s are most likely to use

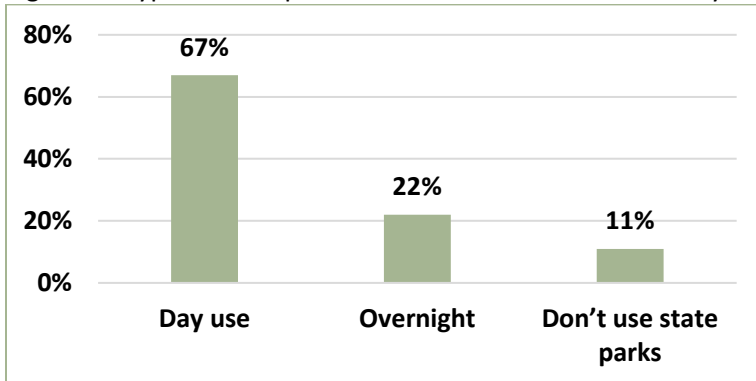


Figure 4: Percent who visited state parks in past 12 months

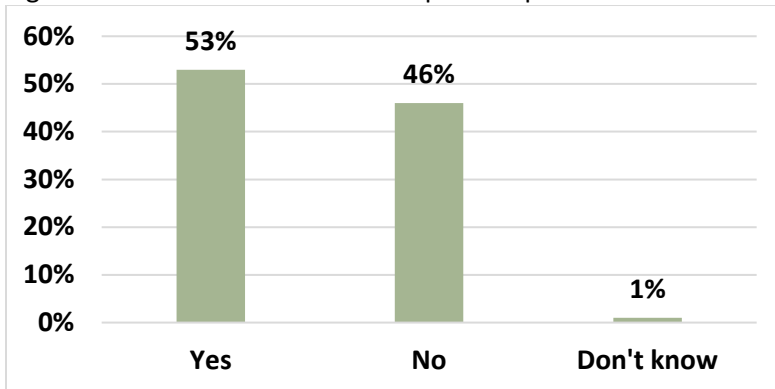
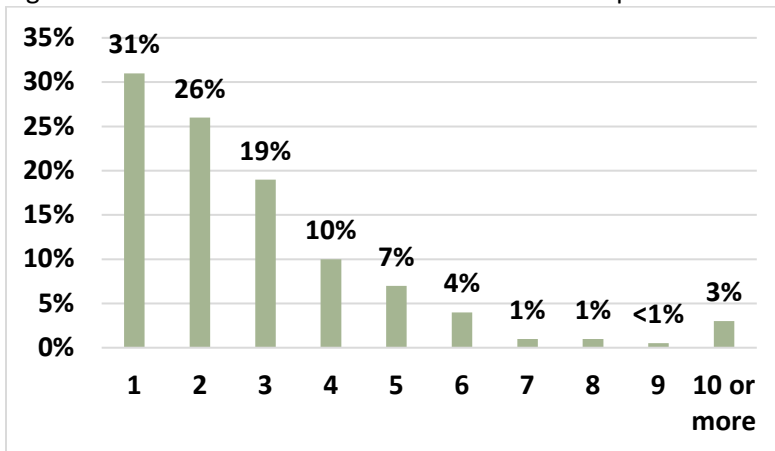


Figure 5: Number of different State Parks visited in past 12 months



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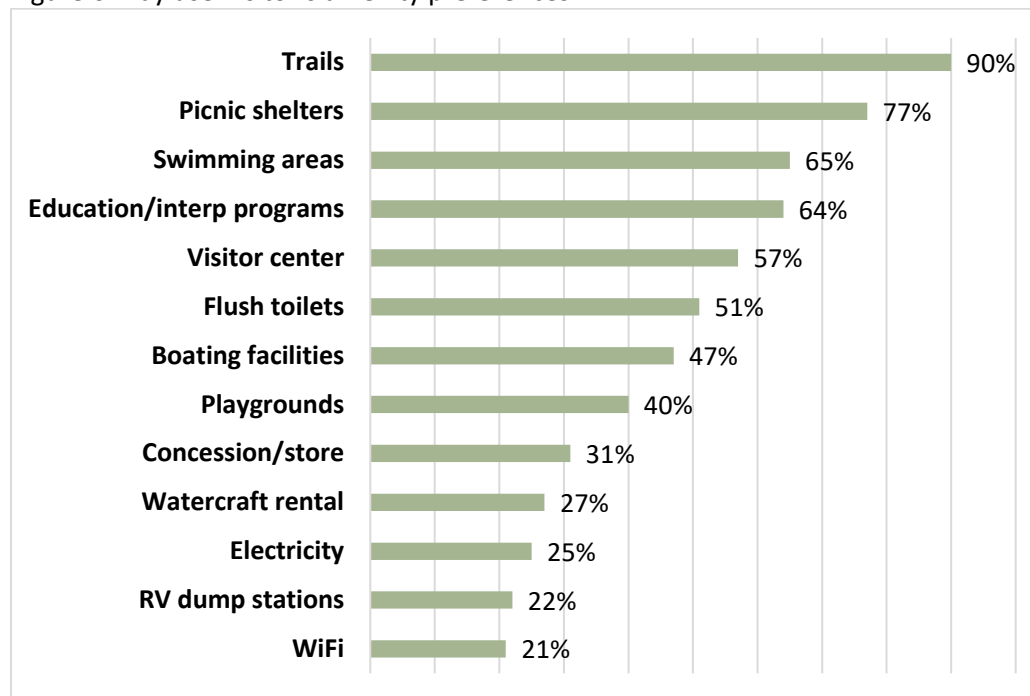
If respondents were more likely to use state parks for day use, they were asked which amenities they would like to have in parks. Likewise, those who overnight in the parks were asked which amenities they would like in parks.

Figure 6 shows that the majority (over 50%) of day use visitors desire trails, picnic shelters, swimming areas, education or interpretive programs, visitor centers and flush toilets. The least chosen amenities by day use visitors were WiFi, RV dump stations, and electricity.

Figure 7 shows that the majority (over 50%) of overnight visitors desire trails, picnic shelters, swimming areas, tent campsites, boating facilities, RV sites, education or interpretive programs, group campsites, visitor centers, electric hookups, showers, and bike/hike-in campsites. The least chosen amenity by overnight visitors was WiFi, with just one-quarter of visitors wanting WiFi.

Finally, comparing the amenity preferences of both overnight and day use visitors, some common-sense differences emerged (Figure 8). Overnight visitors were significantly more likely to want RV dump stations, electricity, and boating facilities than day users. All other amenities were within a 5% difference range between the two types of users indicating that both groups generally desire the same things at state parks.

Figure 6: Day use Visitor's amenity preferences



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Figure 7: Overnight visitor's amenity preferences

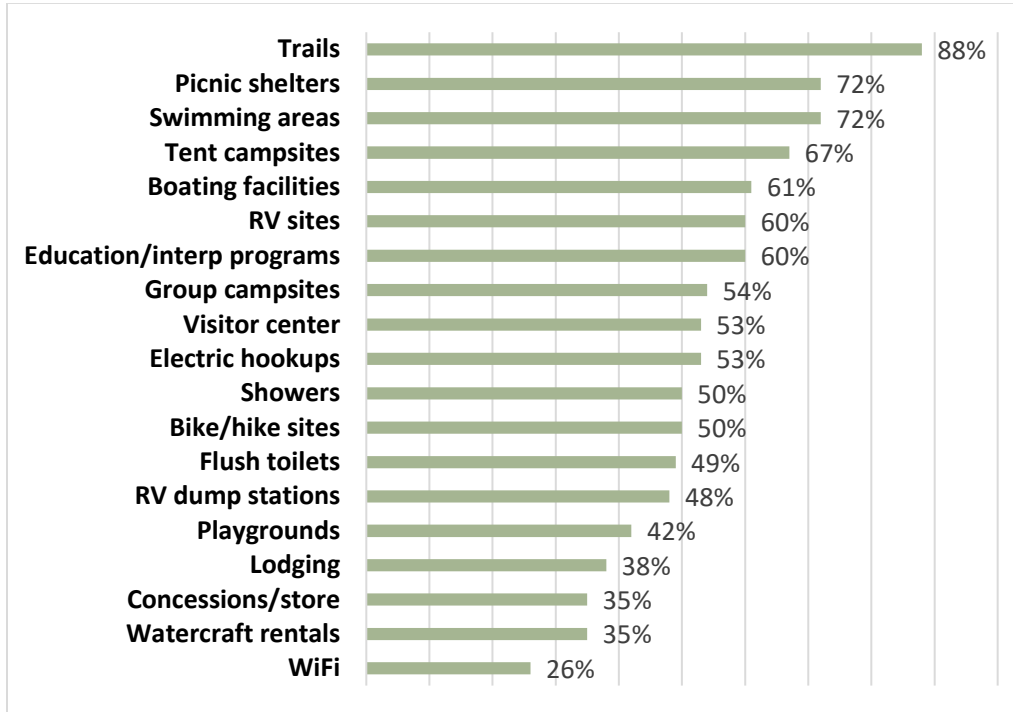
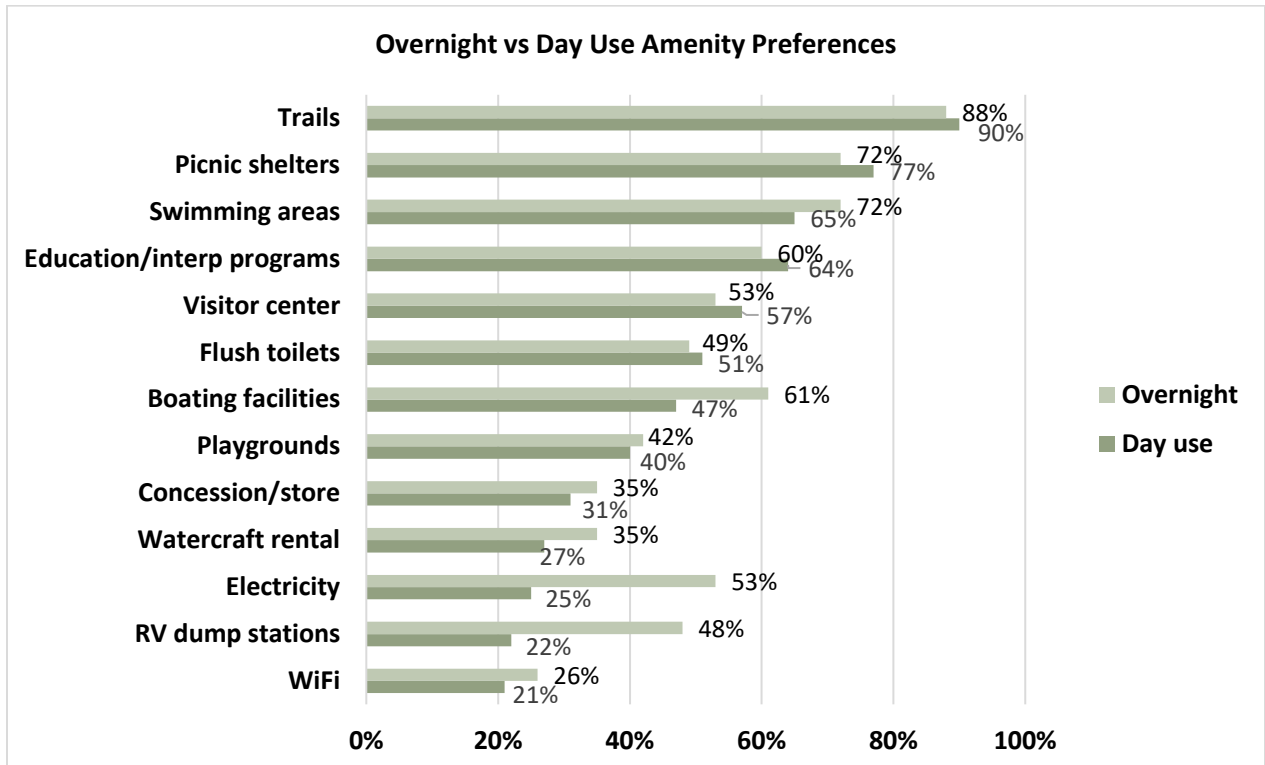


Figure 8: Overnight vs day use amenity preferences



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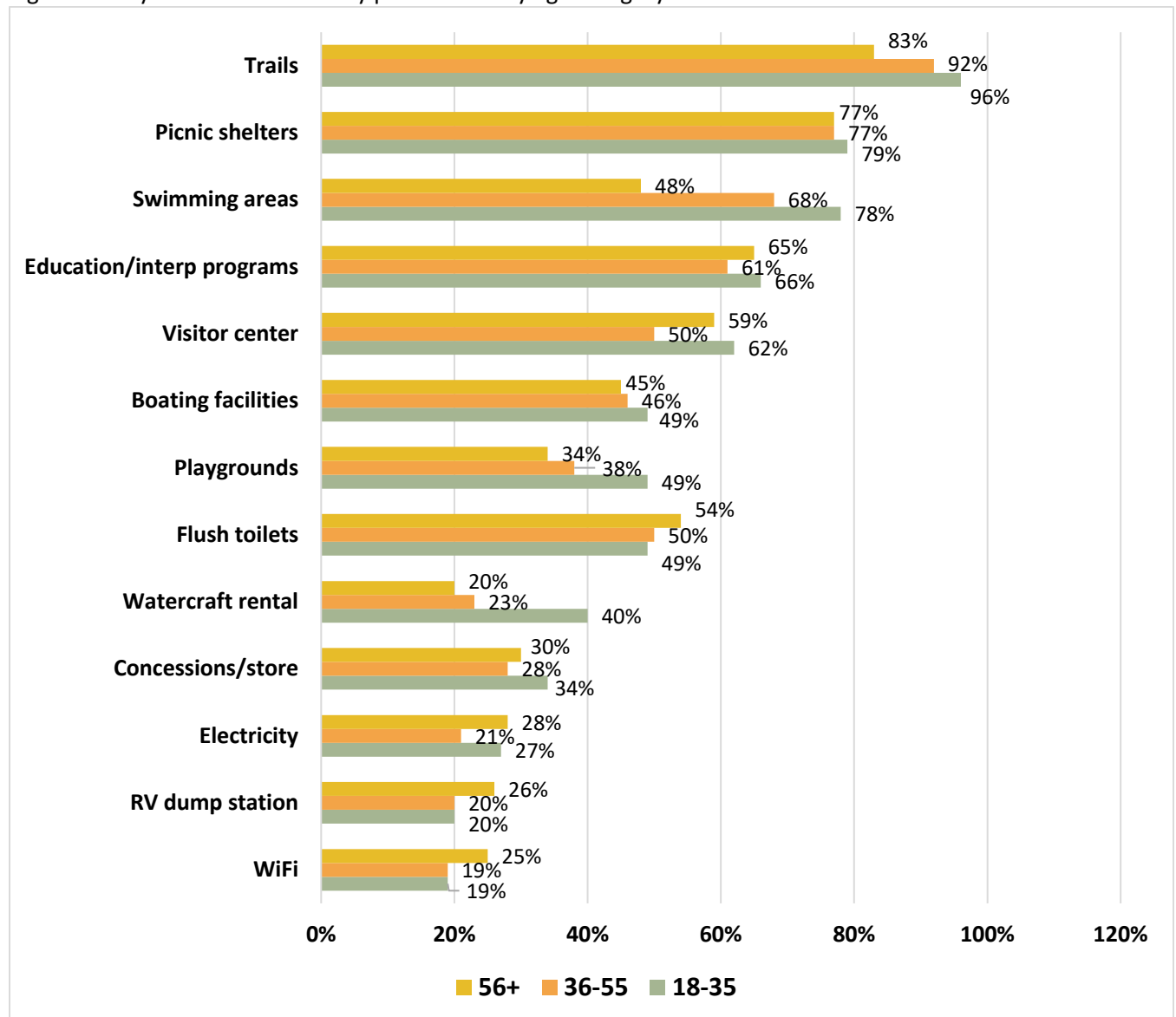
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Results by age categories

There are differences in amenity preferences between age groupings. In most cases, younger park visitors want a wider range of amenities than their older counterparts (Figure 9). Montanans 18-35 years old were 13% more likely to want trails, 30% more likely to want swimming areas, 15% more likely to want playgrounds, and 20% more likely to want watercraft rentals than Montanans 56 years or older. WiFi is the exception. A greater share of older Montanans want WiFi at state parks (25%) than younger residents.

Similar trends existed for the overnight park users (Figure 10). In addition to preferences mentioned above for day-use visitors, the younger age group desired tent sites 43% more often than the oldest group while the oldest group desired RV sites 36% more often than the youngest group.

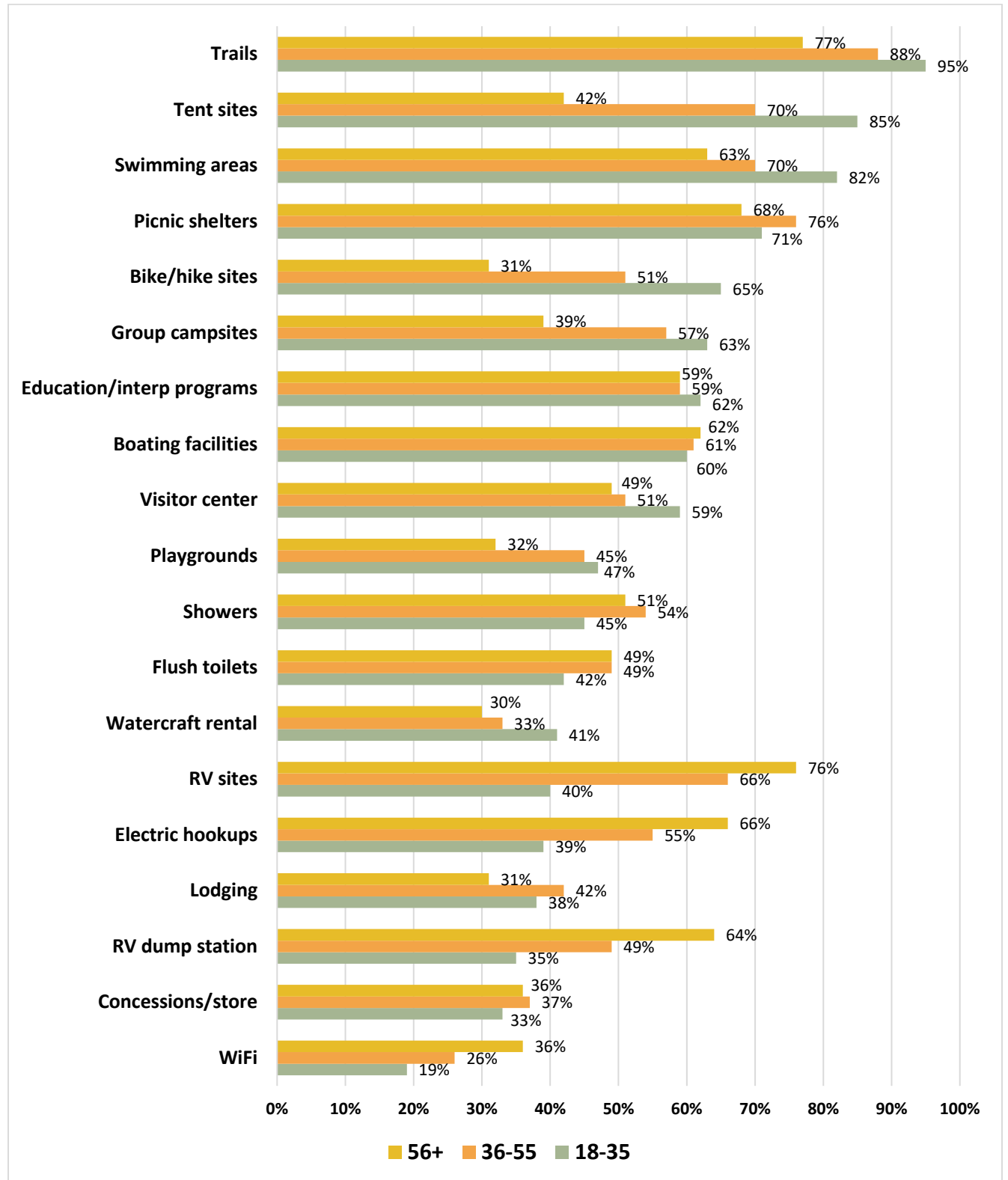
Figure 9: Day use visitor's amenity preferences by age category



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Figure 10: Overnight visitor's amenity preferences by age category



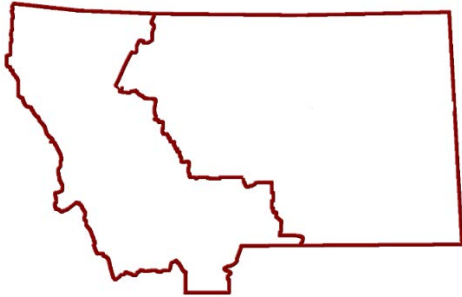
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Results by Montana residence

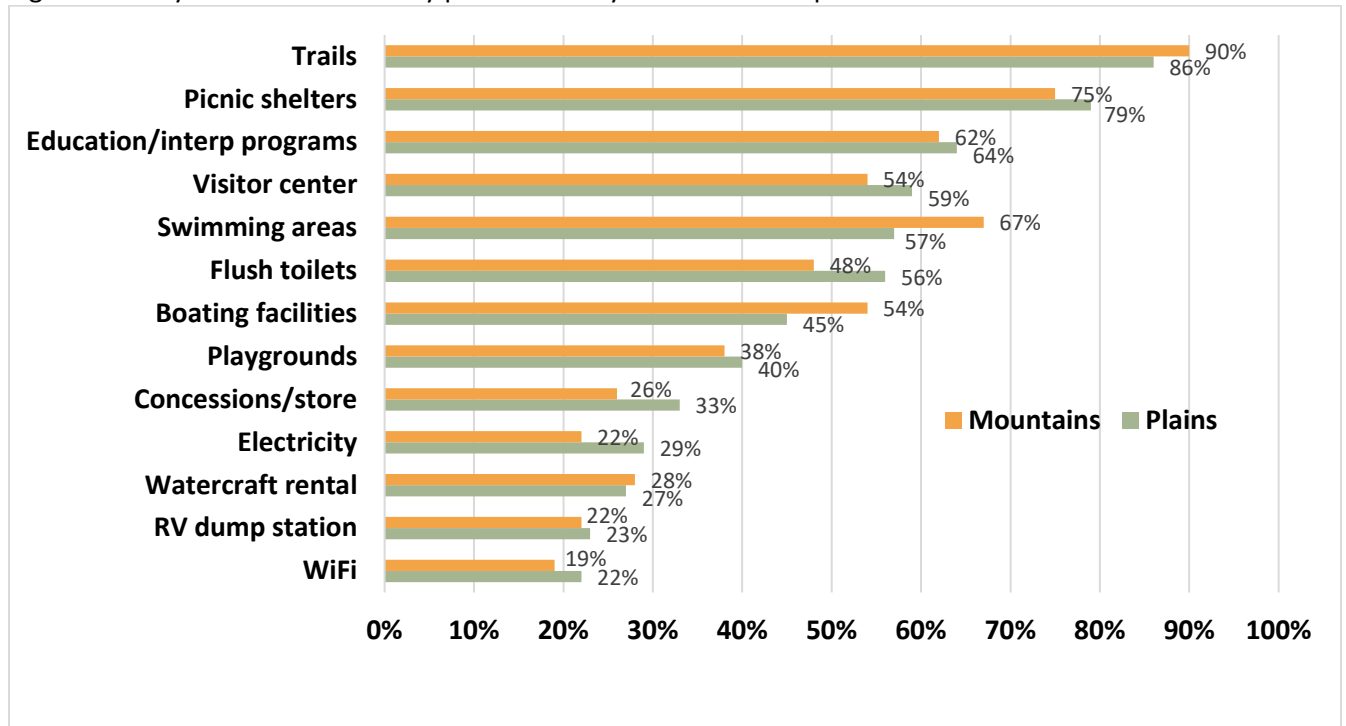
To test whether residents from the more mountainous western part of Montana responded differently to state park amenities than residents living in the less mountainous eastern part of the state, we divided the state as shown in Figure 11 and compared western and eastern survey responses.

Figure 11: Map showing the research split used between mountains and plains



In general, state park day use visitors between the mountains and plains side of Montana are similar in amenities desired. However, Montanans representing the plains are slightly more likely to want more amenities at a higher rate of agreement than those in the mountains. Only swimming areas and boating facilities are more important to the mountainous region residences (Figure 12).

Figure 12: Day use visitor’s amenity preferences by mountains and plains residence



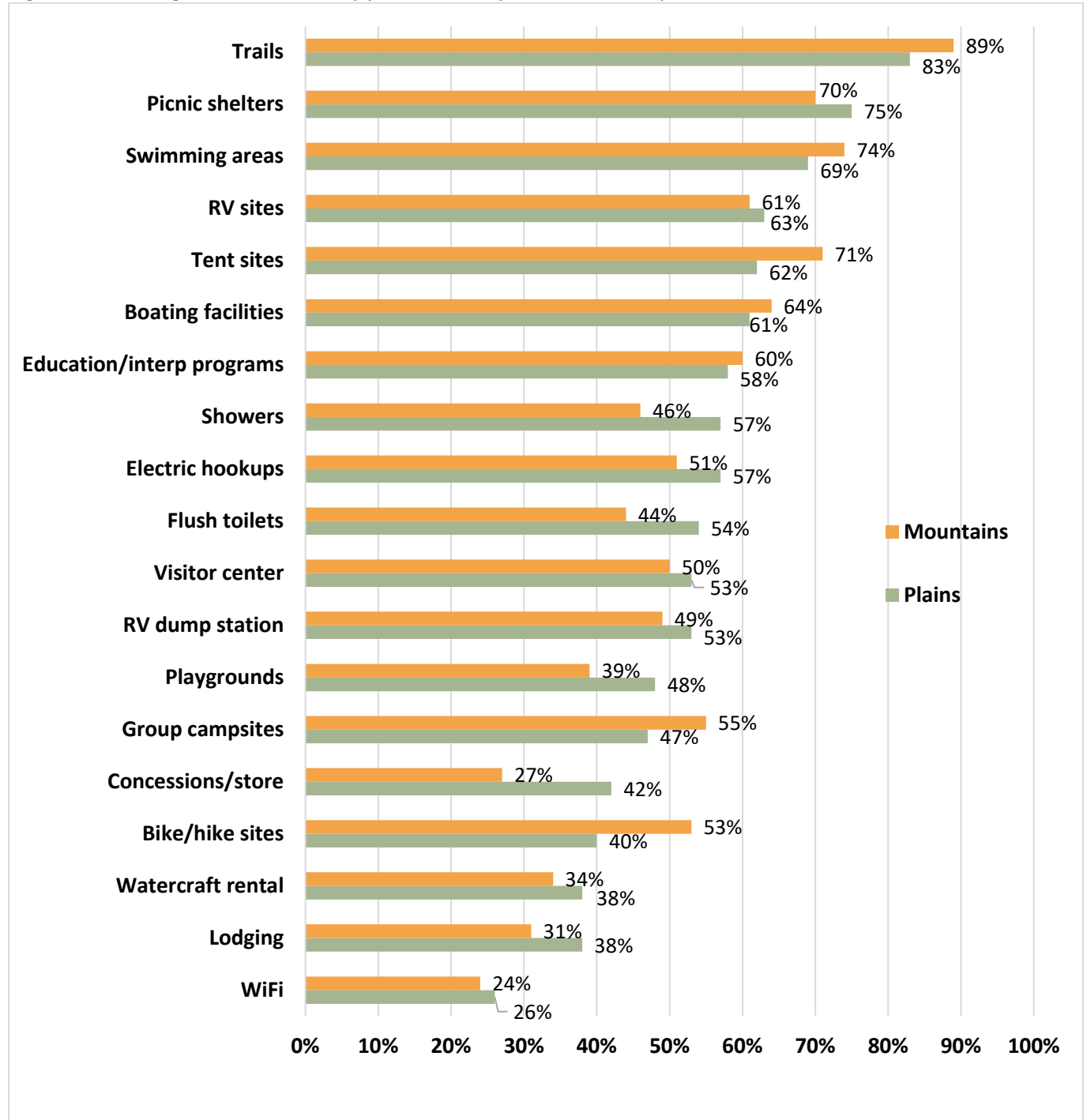
Similar to day-use visitors, overnight visitor amenity desires are not too much different between residents in the mountains vs. the plains. The largest differences are that mountain respondents are

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13% more likely to want shared bike/hike camp sites and 9% more likely to want tent sites, while plains residents are 15% more likely to want concessions or stores (Figure 13).

Figure 13: Overnight visitor’s amenity preferences by mountains and plains residence



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Summary and Discussion

This study was completed by the Institute for Tourism and Recreation Research to assist the Montana Parks in Focus Commission's understanding of resident use of state parks and which outdoor amenities they are seeking. It provides representative and detailed responses from Montanans across the state and includes both young adult and elderly residents. The Parks in Focus Commission intends to use these survey results to ensure the state park system is meeting the needs of residents and to develop enduring recommendations to strengthen Montana's overall state park system.

The survey found that nearly 9 in 10 Montanans have visited state parks over the years. Most visit state parks for day use. A smaller share stays overnight. Both day-use and overnight visitors desire a similar list of amenities at state parks. Trails are at the top of that list, with 90% of day-use visitors and 88% of overnight visitors indicating trails are the amenity they seek at state parks. This preference may be because trails are or provide access to the experience at so many state parks, but also because trails link parks to our communities and surrounding public lands offering a richer and more connected experience than a standalone park can provide by itself.

The goal of the Montana state parks system is "to provide an extraordinary experience for our visitors and to keep our state park system strong now and for generations to come." In order to achieve this goal, it is imperative to understand visitor preferences and specifically the needs of both younger and older state park users. Today's younger park visitor represents not just current but also tomorrow's visitors. Older residents are an expanding demographic in the state and meeting their specific needs is crucial for state parks to remain relevant.

While survey responses showed only modest differences between the preferences of residents from western and eastern parts of the state, residents demonstrate more significant differences between various age groupings. The ages of Montanans and their life stage are an especially good predictor of the type of amenities desired when it comes to overnight users of state parks. Fifty percent or more of the younger (18-35 years old) and the middle age (36-55 years old) overnight user groups desire trails, tent sites, swimming areas, picnic shelters, bike/hike camping sites, group campsites, education and interpretive programs, boating facilities, and visitor centers. While the top amenities desired by the 56+ age overnight visitor group are trails, RV sites, picnic shelters, electric hookups, RV dump stations, boating facilities, swimming areas, education and interpretive programs, and showers.

This study shows that, when asked, Montanans will say yes to a wide range of amenities at state parks. It also shows which amenities are desired by most residents and in this way points toward infrastructure and service priorities that are crucial to satisfying resident visitor demand. In the future it is recommended to survey nonresident visitors to explore their state park preferences, especially since visitor spending brings new dollars to Montana and supports the growing outdoor industry in the state.

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Appendix A: Survey questions

Intro: Hello, my name is _____, and I am with the University of Montana doing a quick survey about Montana State Parks. Do you have a minute or two where I can ask you seven quick questions? (Enter "ref" here if it's an outright refusal. If they agree to participate, go to the first question.)

Have you visited a Montana State Park in the last 12 months?

How many different state parks did you visit in the last 12 months?

Are you more likely to visit Montana State Parks for overnight use or just for the day?

I'm going to read off a list of amenities that would be important to you at State Parks, and just say "yes" or "no" to each: (Surveyor only asked overnight users the overnight list and days users the day list.)

Overnight list	Day Use list
WiFi	WiFi
Watercraft rentals	RV dump stations
Concessions/store	Electricity
Lodging	Watercraft rental
Playgrounds	Concession/store
RV dump stations	Playgrounds
Flush toilets	Boating facilities
Bike/hike sites	Flush toilets
Showers	Visitor center
Electric hookups	Education/interpretive programs
Visitor center	Swimming areas
Group campsites	Picnic shelters
Education/interpretive programs	Trails
RV sites	
Boating facilities	
Tent campsites	
Swimming areas	
Picnic shelters	
Trails	

Do you have children under 18 years of age living in your household?

In which Montana County do you reside?

May I please ask your age?

Gender (observed and recorded)