

MONTANA VISION

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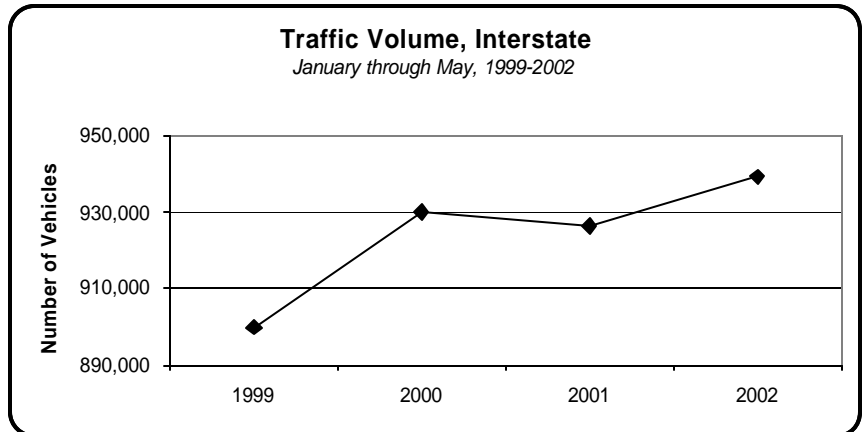
Selected Statistics

The winter and spring seasons of 2002 exhibited growth in terms of highway traffic in the state. The growth is slightly different between Interstates and primary roads, with Interstates showing a steeper trend (up 1.4% over 2001) than primary roads (up 0.7% over 2001). Both types of roads show solid increases in traffic since 1999.

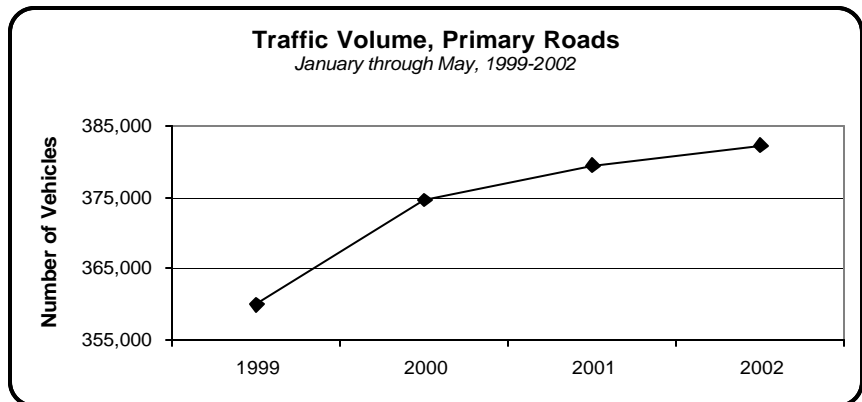


In terms of average hotel occupancy, Montana has not seen the decline experienced in the rest of the Mountain Region*. While the Mountain Region has seen average occupancy drop by 5.1 percent since 1999, and by 4.5 percent since 2001, Montana has seen an increase of 5.8 percent since 1999 and 0.8 percent since 2001. This is evidence of Montana's high rate of repeat visitation from people who stay true to their travel destination even in the wake of the terrorist attacks of September 11. ITRR assumes that, barring any unforeseen developments such as widespread forest fires, this tendency will continue through the summer.

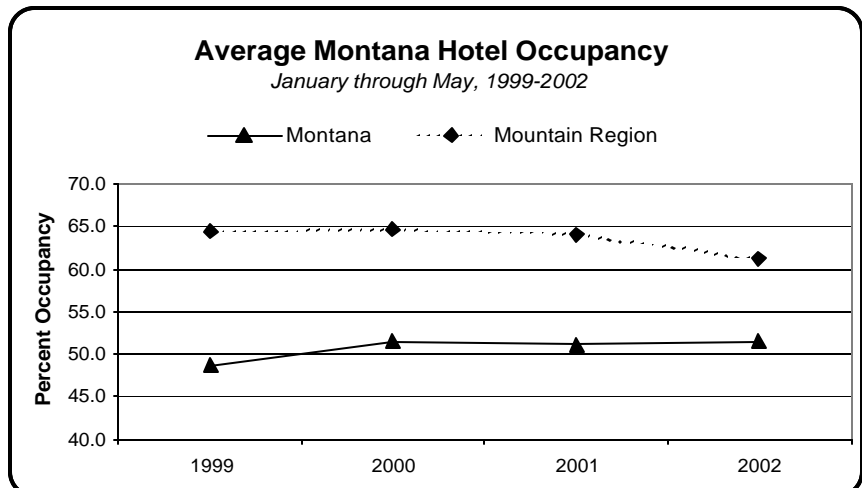
*The Mountain Region includes Montana, Idaho, Wyoming, Colorado, Utah, Nevada, Arizona and New Mexico.



Source: Montana Department of Transportation.



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Source: Smith Travel Research

2001 Nonresident Visitors to Montana: A Summary

The tables on these two pages are a four-season comparison of the 2001 Nonresident visitor study. Each seasonal report is available at

www.forestry.umt.edu/itrr.

The full comparative report will be published soon.

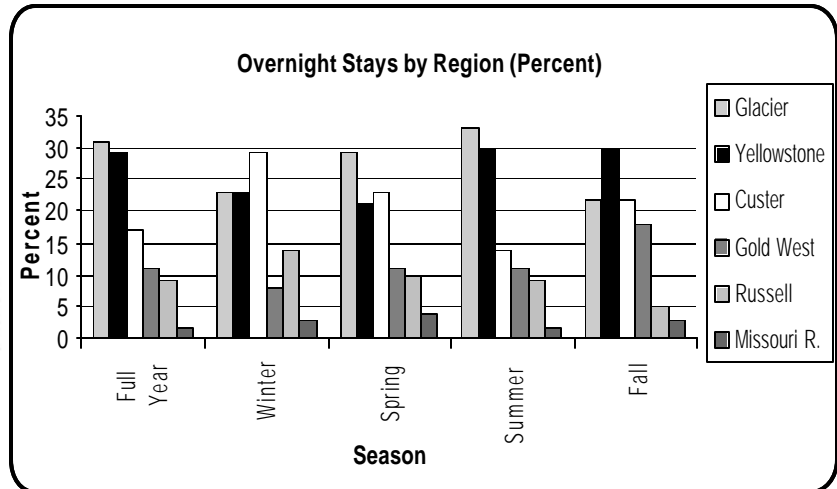
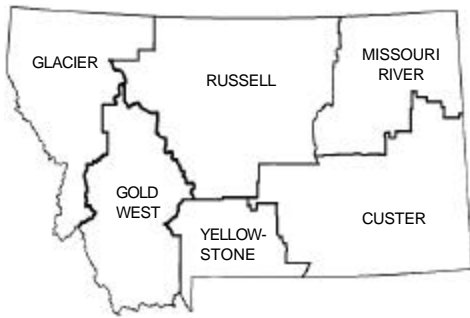


Table 1: Attractions to Montana: Visitors who Indicated Vacation as One Reason for Trip

	Four Seasons		Winter		Spring		Summer		Fall	
	All*	Primary**	All	Primary	All	Primary	All	Primary	All	Primary
Open Space/ uncrowded areas	30%	11%	22%	23%	23%	12%	32%	10%	22%	20%
Mountains/forests	36%	11%	18%	12%	24%	10%	42%	11%	25%	7%
Rivers/lakes	25%	2%	11%	1%	13%	2%	30%	2%	10%	-
Plains/badlands	6%	<1%	4%	-	4%	1%	7%	1%	4%	-
Native Am. culture	7%	1%	4%	-	4%	>1%	8%	1%	1%	-
Lewis & Clark sites	8%	1%	4%	-	6%	>1%	8%	2%	6%	-
Montana History	8%	3%	5%	6%	4%	4%	10%	3%	2%	1%
Family/friends	17%	12%	11%	14%	13%	16%	19%	12%	10%	12%
Glacier NP	22%	17%	4%	-	14%	11%	27%	19%	9%	7%
Yellowstone NP	32%	21%	9%	7%	18%	21%	39%	22%	17%	5%
Wildlife	21%	1%	8%	-	9%	4%	25%	1%	17%	2%
Camping	14%	2%	4%	1%	7%	1%	18%	2%	5%	<1%
Fishing	12%	4%	6%	1%	6%	4%	14%	4%	9%	1%
Hiking	13%	<1%	5%	0	7%	-	16%	1%	4%	-
Hunting	2%	5%	2%	2%	1%	4%	2%	4%	17%	15%
Snowmobiling	1%	<1%	4%	3%	1%	-	-	-	-	-
Downhill Skiing	2%	2%	12%	16%	4%	2%	-	-	-	-
XC Skiing	1%	-	3%	0	2%	-	-	-	-	-
Other Activity	7%	4%	4%	6%	5%	7%	8%	4%	3%	1%
Special Event	5%	4%	5%	9%	3%	2%	6%	4%	4%	3%

*Respondents reported all aspects that attracted them.

**Respondents reported the one main or primary attraction out of all attractions.

Table 2: Reasons for Visiting Montana--All Reasons and the Primary Reason*

	All 4 Seasons		Winter		Spring		Summer		Fall	
	All	Primary	All	Primary	All	Primary	All	Primary	All	Primary
Vacation	64%	44%	39%	23%	43%	23%	72%	52%	44%	29%
Passing Through	34%	26%	32%	29%	53%	47%	30%	21%	37%	34%
Visit Family & Friends (VFR)	29%	15%	32%	16%	27%	14%	28%	15%	37%	23%
Business	11%	8%	24%	18%	14%	11%	8%	7%	13%	7%
Shopping	7%	2%	12%	6%	8%	1%	6%	1%	12%	4%
Other	7%	5%	6%	9%	6%	4%	7%	4%	8%	4%

Table 3: Demographic & Travel Behavior Comparisons

Travelers		Four Season	Winter	Spring	Summer	Fall
Travel Group Type	Couple	40%	32%	39%	41%	42%
	Self	18%	29%	29%	14%	24%
	Family	29%	22%	20%	32%	21%
	Family/Friends	4%	7%	2%	5%	1%
	Friends	7%	6%	8%	6%	8%
	Bus. Assoc.	2%	3%	2%	1%	4%
	Org. Group	1%	1%	-	1%	.2%
Lived in MT Before?	Yes	17%	18%	17%	16%	27%
Visited MT Before?	Yes	79%	95%	81%	76%	89%
Traveling with Children	Yes	21%	18%	10%	25%	10%
Household Income	Less than 20K	7%	7%	10%	7%	7%
	\$20K-\$39,999	18%	16%	20%	17%	22%
	\$40K-\$59,999	25%	20%	22%	25%	26%
	\$60K-\$79,999	20%	24%	20%	20%	11%
	\$80K-\$99,999	11%	16%	13%	11%	10%
	\$100,000+	20%	18%	16%	21%	24%
% who plan to visit in next 2 yrs.		81%	96%	87%	77%	94%
% who flew on portion of trip		19%	22%	18%	20%	11%
% who hired an outfitter		5%	2%	2%	6%	5%

Table 4: Sources of Information Used While in Montana

	Four Season		Winter		Spring		Summer		Fall	
	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful	All Items	Most Useful
Info center person	23%	24%	8%	4%	14%	18%	27%	29%	8%	8%
Billboards	12%	5%	10%	6%	12%	7%	12%	5%	11%	2%
Highway Signs	33%	25%	26%	20%	28%	28%	35%	26%	24%	23%
Brochure Rack	25%	16%	16%	12%	23%	17%	28%	18%	13%	5%
Service Person	29%	25%	29%	30%	25%	30%	30%	24%	26%	29%
None of these Sources	38%	5%	53%	-	44%	-	34%	-	48%	33%

*Percentages may not add up to 100% due to rounding.

Defining “Geotourism”

A new study, sponsored by National Geographic and prepared by the Travel Industry Association of America, adds a new term to the ever-expanding vernacular of travel research.

“**Geotourism**” is concerned with “preserving a destination’s geographic character—the entire combination of natural and human attributes that make one place distinct from another.” With 154 million Americans described as “travelers,” the travel industry is now promoting geotourism in order to ensure the preservation of sites’ culture and history.

The study divided American travelers into categories based on survey responses measuring attitudes about pleasure/vacation travel; preferences for types of leisure trips; importance of different aspects of leisure trips; household/leisure/civic activities at home; and attitudes relating to culture, heritage or the environment.

The categories of travelers were:

****Geo Savvys** (16.3 million travelers)

****Urban Sophisticates** (21.2 million)

****Good Citizens** (7.6 million)

These were characterized by the strongest geotourism inclinations, similar incomes and a high incidence of travel.

The next three segments can be grouped by income and travel behavior. They represent potential markets for geotourism:

****Traditionals** (16.1 million)

****Wishful Thinkers** (22.3 million)

****Apathetics** (19.9 million)

And finally, two segments show the lowest potential for geotourism:

****Outdoor Sportsmen** (21 million)

****Self-Indulgents** (19.9 million)

These differ from other traveler groups due to extreme attitudes and behaviors in travel.

The results of the survey can be viewed at www.tia.org/Pubs/GeotourismPhaseFinal.PDF

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