



College of Forestry
and Conservation
32 Campus Dr. #1234
The University of Montana
Missoula, MT 59812

Phone (406) 243-5686
Fax (406) 243-4845
www.forestry.umt.edu/itrr

2001/2005 Nonresident Comparison: Visitor Profile

Dr. Norma Nickerson
Chrissy Oschell

Institute for Tourism & Recreation Research
College of Forestry and Conservation
The University of Montana
Missoula, MT 59812
www.forestry.umt.edu/itrr

Research Report 2006-5

September 2006

This report was funded by the Lodging Facility Use Tax

Executive Summary of Findings

The information in this document shows some changes between the years and raises a number of questions. Interestingly, however, the two years are more similar than different.

- ❖ The most significant change observed is the increase in the primary reason for visiting Montana. Those primarily in Montana for vacation decreased by 8 percent from 41 percent to 34 percent. In 2005 visiting family and friends as a primary reason increased from 14 to 19 percent. Additionally, those visitors passing-through the state increased from 24 to 27 percent.
- ❖ Overall demographics of visitors showed an increase of 7 percent among those who earn over \$100,000 per year and a 4 percent increase in those who have visited Montana in the past. In addition, our neighboring states of Wyoming and Idaho visited Montana in greater numbers than in 2001. National statistics indicate that people are traveling closer to home since 9/11. This appears to be what is happening in Montana as well. However, the increase in the percent of visitors who flew on a portion of their trip was significant. In 2001 19 percent indicated flying while in 2005 30 percent indicated flying. Since only ten percent of nonresidents fly directly into Montana, this leaves 20 percent who flew into neighboring airports and rented a vehicle for their visit into Montana. It might be safe to say that our neighboring states are visiting more frequently but our high income visitors are coming from further away and flying on a portion of their trip.
- ❖ Foreign visitors from overseas increased only ½ percent while overall Canadian visitation rose by 2 percent.
- ❖ As in 2001, the highest percent of overnights are spent in hotels, motels, or bed and breakfast establishments even though it did decrease by 4 percent in 2005. This decrease was replaced by an 8 percent increase in visitors staying at the home of friends or relatives.
- ❖ Mountains/forests was still the number one attraction to those on vacation in Montana followed by open space/uncrowded areas, Yellowstone National Park, rivers, and Glacier National Park. The top five attractions remained the same in both years (but not in the same order).
- ❖ The percent participating in activities remained very similar from 2001 to 2005.
- ❖ Not surprisingly, the Internet continues to grow as a source of information. While 5 percent more indicated they used the Internet in 2005 for planning their trip, 11 percent more said it was the most useful source of information.
- ❖ Highway information signs and service personnel continued to be the most useful source of information while in Montana.
- ❖ Road segments traveled by nonresidents within Montana remained similar between the two years with Interstates the most traveled roads.
- ❖ Visitors are still satisfied with Montana conditions on par with 2001 satisfaction levels.
- ❖ Responses to 'changes seen over time' were similar to 2001 including the response about the "amount of open space." This item received the highest mean in both 2001 and 2005 indicating that open space is disappearing in the minds of nonresidents.

Introduction

This summary report shows comparable data between the 2001 and 2005 nonresident visitors to Montana. As survey instruments improve, comparability becomes problematic for some variables. Therefore, this report provides the variables which were asked the same in both years. In some instances n/a appears where the answer or question was not provided on a particular survey instrument.

Visitation for 2005 was 10.1 million nonresidents. In 2001 visitation was 9.5 million nonresidents. The nonresident visitor study results are provided here as a full year comparison between the two study years. Niche News of visitor segments from this data set will be available as analysis continues.

Methodology (2005 Study)

Data were collected throughout 2005 by 12 surveyors located across the state. Nonresidents were defined as persons who entered Montana by private vehicle or commercial air carrier during the study period and whose primary residence was not MT at the time. In 2005, 15,126 nonresident visitors were contacted for the initial front end survey with a 95 percent response rate. There were 6,152 mail-back questionnaires returned for a response rate of 43 percent. Surveys represent travel groups, not individuals. The 2001 data were collected similarly to 2005. For complete description of methods and results see <http://www.itrr.umt.edu/research/NonresSeason02.pdf>.

Sampling Schedule

- ❖ Surveyors averaged 2 days per week for 12 months.
- ❖ Days were randomly selected and included both weekdays and weekends.
- ❖ Surveyors worked 8 to 10 hour shifts with times covering 7:00 am to 8:00 pm on highways and 5:00 am to 9:00 pm at airports.
- ❖ Surveyors did not work past 8 pm due to darkness and for safety reasons.

Locations

- ❖ Surveying occurred at gas stations, rest areas, Canadian border crossings, and the 8 major airports in Montana. These sites were considered as neutral and unbiased to specific visitor types.
- ❖ Prior permission was received from each establishment and airport security.
- ❖ Locations were surveyed at different times and on different days to represent the variability of travelers around the state.

Front End Survey and Mail Back Survey

- ❖ Two surveys were used for this study – an initial interview called the front end survey and a longer mail-back survey.
- ❖ To obtain the data, surveyors approached vehicles with nonresident license plates at gas stations and rest areas, and asked airport visitors if they were from out of state.
- ❖ Surveyors introduced themselves, explained the study, and asked visitors if they would answer a few front end questions, usually taking less than 1 minute.
- ❖ Front end questions asked travel method, group type and size, state of residency, zip code, purpose of trip, entry point, direction of travel, planned exit and length of stay.
- ❖ Surveyors then asked if visitors would complete a longer mail back survey with 95 percent taking the survey. They were given the survey, pre-paid business reply envelope, and a coupon for a monthly prize drawing and a one-time drawing for a year end all expense paid trip to Montana as an incentive to respond.

Expenditures

- ❖ Surveyors directed nonresidents to track their expenses for a single day. This day was handwritten on the pre-paid business reply envelope.
- ❖ For airport nonresidents: If the survey ID was odd, expenses were recorded for that day. If the ID was even, expenses were recorded for the previous day.
- ❖ For gas station, rest areas and border crossings: If the nonresident was not staying another night, expenses were recorded for that day. If they were staying another night and the survey ID was odd, they also recorded expenses for that day. If they were staying another night and the survey ID was even, nonresidents recorded expenses for the next day.
- ❖ Only expenses occurring in the state of Montana were considered.

Population Estimation

- ❖ To estimate the nonresident travel population, two sources of information were used: 1) traffic counts provided by the Montana DOT, Idaho DOT, Wyoming DOT, North Dakota DOT, U.S. Customs, and Helena Regional Airport Authority 2) Resident/Nonresident proportion counts provided by ITRR surveyors.
- ❖ Traffic counts were collected from 34 border entry points and 8 airports.
- ❖ Airport proportion counts were obtained by questioning boarding air passengers about their place of residence. A stratified sampling of days, airlines, and times was used.
- ❖ Highway proportion counts were obtained by surveyor observing license plates at all border points using a stratified sampling frame based on highway traffic load. Proportion counts were only conducted in daylight hours.

Weighting Data

- ❖ Since the larger mail-back survey was not returned by all travelers, it was necessary to adjust the mail-back survey data to reflect the traveler population. Three variables on the front end survey were used to adjust the mail back data: entry point, main purpose of trip, and group type. Weighting the mail back survey data on these three variables adjusted the data so it reflected the front end "population" data.

Table 1: Percent of Nonresidents on East-West Highway Segments*

WEST-EAST		2005	2001
I-90	ID Border to Missoula	22-38%	18-34%
	Missoula to Butte	30-38%	23-42%
	Butte to Bozeman	25-37%	23-40%
	Bozeman to Livingston	34-37%	39-43%
	Livingston to Billings	28-42%	25-46%
	Billings to WY Border	16-42%	18-24%
I-94	Billings to Miles City	14-42%	14-30%
	Miles City to Glendive	15%	14-31%
	Glendive to ND Border	9-15%	11-28%
US2	ID Border to Kalispell	4-14%	3-6%
	Kalispell to W. Glacier	9-14%	4-19%
	W. Glacier to Shelby	5-11%	3-10%
	Shelby to Glasgow	3-11%	3-7%
	Glasgow to ND Border	2-3%	2-7%
MT200	Missoula to Great Falls	3-38%	n/a
	G. Falls to Hwy 87 Jct.	3-15%	1-8%
	Hwy 87 to ND Border	1-6%	0-10%
US 12/287	Helena to Townsend	5-13%	2-7%
US 212	Red Lodge to Laurel	4-34%	0-7%
	I90 Jct. to Broadus/WY	4-16%	3%

*In 2005, road segment traffic was calculated based on visitors traveling through the towns where the road goes. In 2001 traffic was calculated by individual road segments. Slight differences may occur because of the change in calculation methods. The ranges indicate that traffic can enter or exit that road segment and therefore traffic fluctuates between the points highlighted in the table.

Table 2: Percent of Nonresidents on North-South Highway Segments*

NORTH-SOUTH		2005	2001
I-15	Canada to Shelby	6-11%	4-9%
	Shelby to Great Falls	8-15%	7-13%
	Great Falls to Helena	13-15%	6-11%
	Helena to Butte	7-30%	6-10%
	Butte to Dillon	18-30%	10-16%
	Dillon to ID Border	18%	9-18%
US93	Canada to Kalispell	2-14%	2-8%
	Kalispell to Polson	10-14%	2-10%
	Polson to Missoula	9-38%	4-14%
	Missoula to ID Border	4-38%	1-6%
US191	Lewistown to I90	2-28%	2-4%
	Bozeman to Big Sky	11-37%	5-12%
	Big Sky to W. Yellowstone	11-19%	7-12%
	W. Yellowstone to Madison Junction	19-24%	4-15%
US59	Miles City to WY Border	4-15%	1-6%
US287	Choteau to I15 Jct.	2-3%	3-6%
	I15 Jct. to West Yellowstone	4-28%	5-7%
US89	Canadian B. to Browning	5-8%	5-12%
	Browning to Great Falls	3-15%	4-7%
	Livingston to Gardiner	13-34%	8-19%
MT16	Canada to Plentywood	1%	6%

*In 2005, road segment traffic was calculated based on visitors traveling through the towns where the road goes. In 2001 traffic was calculated by individual road segments. Slight differences may occur because of the change in calculation methods. The ranges indicate that traffic can enter or exit that road segment and therefore traffic fluctuates between the points highlighted in the table.

Table 3: Reasons for Visiting Montana

	2005		2001	
	All*	Primary**	All	Primary
Vacation	56%	34%	64%	41%
Passing Through	32%	27%	34%	24%
Visit Family & Friends	32%	19%	29%	14%
Business	16%	13%	11%	8%
Shopping	8%	2%	7%	2%
Other	9%	6%	7%	4%

*Percentages do not add up to 100% because respondents could choose more than one.

** Percentages may not add up to 100% in the *Primary Column* due to rounding.

Table 4: Satisfaction with Montana Conditions*

	2005 Mean	2001 Mean
Road Conditions	1.25	1.29
Directional Signage	1.17	1.20
Hospitality & Service	1.12	1.12
Commercial Lodging Availability	1.19	1.23
Availability of Highway Rest Areas	1.48	1.52
Condition of Natural Environment	1.10	1.16
Amount of Roadside Historical Information	1.28	1.35
Availability of Travel Information	1.27	1.33
Overall satisfaction with Montana	1.06	N/A

*1=Satisfied, 2=Neutral, 3=Dissatisfied

Table 5: Changes Seen Over Time by Returning Visitors*

	2005 Mean	2001 Mean
Road Conditions	1.61	1.59
Directional Signage	1.72	1.71
Hospitality and Service	1.76	1.76
Commercial Lodging Availability	1.59	1.56
Availability of Highway Rest Areas	1.83	1.83
Condition of Natural Environment	1.88	1.91
Amount of Roadside Historical Information	1.73	1.77
Availability of Travel Information	1.63	1.65
Amount of Wildlife Viewing Opportunities	1.90	1.91
Recreation Opportunities	1.72	1.69
Amount of Open Space	2.13	2.11
Camping Availability	1.86	1.85

*1=better condition, 2=same condition, 3=worse condition

Table 6: General Trip Behavior

Travelers		2005	2001
All Purposes of Trip	Vacation	56%	64%
	VFR	32%	29%
	Passing Thru	32%	34%
	Business	16%	11%
	Shopping	8%	7%
	Other	9%	7%
Plan to Visit in Next 2 yrs.	Yes	85%	80%
Flew on Portion of Trip	Yes	30%	19%
Rent Auto	Yes	22%	15%
Hired Outfitter	Yes	5%	5%

Table 7: Demographic Comparison of Travel Groups*

Travelers		2005	2001
Travel Group Type	Couple	32%	32%
	Self	27%	27%
	Immediate Family	25%	n/a
	Extended Family	3%	n/a
	Family	n/a	32%
	Family/Friends	4%	2%
	Friends	7%	7%
	Business Assoc.	2%	1%
Org. Group	<1%	<1%	
Lived in MT Before?	Yes	20%	17%
Visited MT Before?	Yes	83%	79%
Number of visits in past 10 years	1	10%	15%
	2	10%	13%
	3	8%	9%
	4	7%	7%
	5	6%	7%
	6 to 10	18%	19%
	11 to 20	14%	11%
	21+	21%	19%
Seasons Visited Before	Spring	42%	39%
	Summer	62%	68%
	Fall	47%	42%
	Winter	39%	33%
Household Income		2005	2001
	Less than \$20K	6%	7%
	\$20K-\$39,999	14%	18%
	\$40K-\$59,999	22%	25%
	\$60K-\$79,999	20%	20%
	\$80K-\$99,999	12%	11%
	\$100,000-\$119,000	10%	20%
	\$120,000 +	17%	n/a
Own 2nd Home in MT	Yes	6%	n/a
Visiting to Buy Property	Yes	4%	n/a

*Percentages may not add to 100% due to rounding

Table 8: Visitors Place of Residence

Place of Residence	2005	2001
United States	WA: 12%	WA: 12%
	ID: 10%	CA: 9%
	WY: 8%	ND: 7%
	CA: 7%	ID: 6%
	ND, UT: 5%	MN, WY: 5%
	CO, MN: 4%	CO, OR, UT: 4%
	OR, TX: 3%	AZ, TX, WI: 3%
	AZ, FL, IL, MI, SD, WI: 2%	FL, IL, MI, NY, PA: 2%
	AK, GA, IN, IA, KS, MO, NE, NV, NM, NY, NC, OH, PA, TN, VA: 1%	AK, GA, IN, IA, KS, LA, MO, NV, NY, NC, OH, OK, TN, VA: 1%
Canadian Visitors	8% of Total Visitors Alberta: 5%, BC and Sask.: 1%, All others are <1% each: Manitoba, Ontario, Quebec, Newfoundland, NewBrun, Nova Scotia, Yukon NW Territory	6% of Total Visitors Alberta: 5%, BC, Sask., Ontario: 1%, All others are <1% each: Manitoba, Quebec, Newfoundland, Nova Scotia, Yukon/NW Territory
Overseas Visitors	2% of Total Visitors Australia, Belgium, England/UK, Germany, Holland/Netherlands, Italy, New Zealand, American Samoa, Argentina, Austria, Bahamas, British Fiji, Bosnia, Columbia, Costa Rica, Curacao, Czech Republic, Denmark, Ethiopia, France, Guam, Hong Kong, Ireland, Israel, Japan, Mexico, Norway, Philippines, Poland, Slovakia, South Africa, Sweden, Switzerland, Taiwan, Turkey, Ukraine, U.S. Virgin Islands, Yemen, Africa	1.5% of Total Visitors Germany, Switzerland, Holland/Netherlands, England, Austria, Australia, France, Italy, Sweden, Japan, Ireland, Korea, Mexico, Taiwan, Thailand, Spain, South Africa, Norway, Columbia, West Indies/Caribbean, New Zealand, Brazil, Polynesia/Pacific Island, Israel, Denmark, Finland, Belgium, Czech Republic, Poland, China/Hong Kong, Venezuela, Estonia, Philippines, Luxembourg, Puerto Rico, India, Bermuda

Table 9: Accommodations (Percent of nights spent in each accommodation type)

Travelers	2005	2001	
If Overnight in MT, Percent of Nights Spent in Accommodation Types	Hotel/motel/B&B	43%	48%
	Parking Lot	1%	2%
	Cabin/2nd Home	5%	4%
	Public Campground	6%	10%
	Private Campground	9%	12%
	VFR Home	27%	17%
	Rented Cabin	4%	2%
	Resort/Condo	4%	3%
	Guest Ranch	2%	<1%
	Other	1%	1%

Table 10: Attractions to Montana for Those who Indicated Vacation as One Reason for Trip

	2005 All*	2005 Primary**		2001 All	2001 Primary
Mountains/Forests	61%	18%	Mountains/Forests	36%	11%
Open Space/Uncrowded Areas	49%	13%	Open Space/Uncrowded Areas	30%	11%
Yellowstone National Park	47%	22%	Rivers/Lakes	25%	2%
Rivers	37%	2%	Plains/Badlands	6%	<1%
Glacier National Park	32%	14%	Native American Culture	7%	1%
Family/Friends	30%	16%	Lewis and Clark Sites	8%	1%
Lakes	26%	1%	Montana History	8%	3%
Wildlife/Fish	24%	6%	Family/Friends	17%	12%
Lewis & Clark Sites	15%	2%	Glacier NP	22%	17%
Montana History & Culture	12%	1%	Yellowstone NP	32%	21%
Native American history & culture	12%	1%	Wildlife	21%	1%
Resorts	8%	3%	Camping	14%	2%
Northern Great Plains/Badlands	8%	<1%	Fishing	12%	4%
A Montana State Park	5%	<1%	Hiking	13%	<1%
Special Events	5%	2%	Hunting	2%	5%
Dude/guest Ranch	2%	1%	Snowmobiling	1%	<1%
			Downhill Skiing	2%	2%
			XC Skiing	1%	-
			Other Activity	7%	4%
			Special Event	5%	4%

*Percentages do not add up to 100% because respondents could choose more than one.

**Percentages in the *Primary* column may not add up to 100% due to rounding

Table11: Sources of Information Used to Plan Trip

	2005		2001	
	All Items*	Most Useful**	All Items	Most Useful
Internet	43%	49%	38%	39%
Automobile Club	18%	16%	23%	24%
Chamber/Visitor Bureau	6%	3%	8%	4%
Montana Travel Planner	8%	4%	8%	5%
Toll-Free State Travel Number	2%	1%	1%	1%
Magazine/Newspaper Articles	7%	3%	n/a	n/a
National Park Brochure/Book/Website	20%	9%	14%	7%
State Park Brochure/Website	4%	1%	n/a	n/a
Guide Book (not auto club book)	10%	7%	11%	8%
Information from Private Business	9%	8%	9%	9%
Used no Sources Listed	14%	n/a	40%	n/a
Used no information sources	30%	n/a	n/a	n/a

*Percentages do not add up to 100% because respondents could choose more than one.

* Percentages may not add to 100% in the *Most Useful* column due to rounding

Table 12: Sources of Information Used While in Montana

	2005		2001	
	All Items*	Most Useful**	All Items	Most Useful
Highway information signs	63%	30%	33%	24%
Service person	54%	26%	29%	25%
Brochure rack	40%	15%	25%	16%
Billboards	34%	4%	12%	5%
Info center staff	26%	18%	23%	24%
Other traveler	23%	8%	n/a	n/a

*Percentages do not add up to 100% because respondents could choose more than one.

** Percentages may not add to 100% in the *Most Useful* column due to rounding

Table 13: Sites Visited by Travelers in Montana

	2005	2001
Yellowstone National Park	32%	40%
Glacier National Park	20%	27%
Little Bighorn Battlefield	9%	14%
Other Montana State Parks	7%	n/a
Flathead Lake State Parks	6%	17%
Virginia City/Nevada City	5%	n/a
Bighole Battlefield	3%	n/a
Fort Peck Lake	2%	3%
National Bison Range	3%	5%
Clark Canyon Reservoir	2%	1%
Lemhi Pass	2%	1%
Lolo Pass Interpretive Center	3%	3%
Lost Trail Pass	2%	2%
Bighorn Canyon Nat'l Recreation Area	3%	5%
Museum of the Rockies, Bozeman	3%	4%
Lewis & Clark Interpretive Center, Great Falls	4%	6%
Montana Historical Museum, Helena	2%	2%
Pompey's Pillar	3%	4%
CM Russell National Wildlife Refuge	2%	2%
Bob Marshall Wilderness Complex	2%	n/a
Bannack State Park	1%	n/a
Lewis & Clark Caverns State Park	2%	n/a
Missouri Headwaters State Park	3%	5%
Makoshika State Park	<1%	n/a

Table 14: Activities Participated in While in Montana on this Trip

	2005		2001	
	All Items*	Highlights**	All Items*	Primary
Picknicking	20%	10%	23%	7%
Camping (devlp.)	10%	8%	19%	9%
Camping (undevelp.)	5%	4%	8%	4%
Day Hiking	23%	24%	27%	11%
Golfing	4%	4%	5%	2%
Backpacking	3%	2%	3%	<1%
Mountain Biking	2%	1%	2%	<1%
Road/tour Biking	3%	3%	3%	1%
Off Highway/ATV	3%	2%	2%	<1%
Fishing	11%	12%	14%	6%
Motor boating	2%	2%	3%	<1%
Canoe/Kayaking	3%	2%	3%	<1%
Rafting/Floating	5%	5%	5%	2%
Horseback Riding	5%	4%	n/a	n/a
Nature Study	11%	7%	10%	3%
Hunting	3%	4%	2%	<1%
Birding	5%	3%	n/a	n/a
Wildlife Watching	32%	39%	30%	12%
Sporting Event	3%	3%	3%	<1%
Gambling	6%	4%	8%	2%
Recreational Shopping	26%	19%	37%	13%
Driving for Pleasure	45%	49%	n/a	n/a
Snowmobiling	2%	3%	<1%	<1%
Downhill Skiing	5%	6%	1%	1%
Snowboarding	1%	1%	<1%	<1%
XC Skiing	1%	1%	<1%	<1%
Snowshoeing	1%	<1%	<1%	<1%
Visiting Native American Sites	10%	8%	13%	3%
Visiting Lewis & Clark Sites	14%	11%	13%	3%
Visiting Other Historic Sites	19%	15%	23%	8%
Visiting museums	14%	10%	17%	4%
Festivals or special events	8%	6%	10%	3%
Attend performing arts	2%	2%	n/a	n/a
Art Exhibits	4%	2%	n/a	n/a

*Percentages do not add up to 100% because respondents could choose all that applied.

**Percentages in *Highlights* column do not add to 100% because respondents could choose up to four activities that were highlights of their trip. Readers should use caution when comparing this column with the 2001 *Primary* column; respondents chose one primary activity for the 2001 survey.