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A Profile of Nonresident Travelers through Missoula: Winter 1993

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A Profile of Non-Resident Travelers Through Missoula: Winter 1993

Research Note 19 - June 1994

About the Report

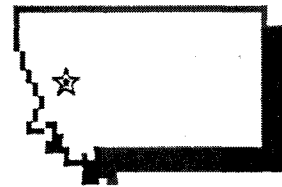
This report describes seasonal non-resident travel characteristics and patterns of visitors to Montana who have passed through, made expenditures, or have stayed overnight in Missoula during the 1993 winter season.

Non-resident travel survey data was gathered for each month of 1993. Data from the months of

January, February, and December were chosen to represent non-resident winter travelers.

This profile describes only these out-of-state visitors and does not include visitors at Missoula who are residents of Montana. Characteristics of out-of-state visitors are presented along with comparison to statewide visitors.

Only visitors traveling in private vehicles on highways are included in these estimates. Visitors traveling by bus or plane or with charter groups are not included.



The Institute for Tourism and Recreation Research (ITRR) at The University of Montana serves as the research arm for Montana's travel, recreation, and tourism industry. The mission of the Institute is to provide information that will assist the industry in making informed decisions about planning, marketing, development, and management.

This report is Phase Two of a two phase project providing information to the Missoula Convention and Visitors Bureau. This data is provided for assessment of the economic and social desirability of different winter market segments.

This report was prepared by Justin Harris, Nancy Lee Menning, and Neal A. Christensen.

Background of the Study

Data for this profile were analyzed from the 1993 Montana Travel Survey Database. Non-residents traveling by highway and air¹ were sampled. Highway travelers were contacted at 19 interstate and primary highway points, and service stations in West Yellowstone and in the seven largest Montana cities (Billings, Bozeman, Butte, Great Falls, Helena, Kalispell, and Missoula). These entry and pass-by locations account for better than 80% of Montana's non-resident highway traffic. Visitors contacted were asked to complete a diary question-

naire during their trip and return it by mail. Participants recorded information about their trip to Montana including: demographics, travel characteristics, recreation activities, length of stay, and one day of expenditures.

Of the 1732 questionnaires distributed, 741 were returned for a 42% response rate. Of the questionnaires returned, 214 represent travelers by Missoula.

¹The sample size for visitors traveling by air was not large enough for statistical analysis. This group is excluded from the report.

Study Limitations

This profile has the following limitations:

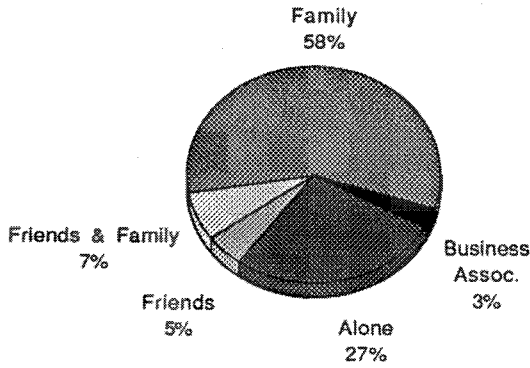
1. The data represent Montana trip characteristics of non-resident travelers by Missoula and may not represent trip characteristics of non-resident travelers during a stay in Missoula.
2. The data reflect only those groups traveling in non-commercial vehicles on Montana's highways and do not include other travel methods.
3. The data reflect only those who responded to the questionnaire; data regarding non-respondents' travel patterns are not known.
4. This report summarizes the characteristics of a small portion of travelers who have entered Missoula, purposefully or not, and may not reflect the population of all non-resident travelers to Missoula.
5. These data are specific to non-resident traveler characteristics and do not reflect resident visitors to Missoula.
6. The data shown reflect the responses as reported by the visitors. It is assumed that those responses reflect actual behavior. Response validity was increased by asking visitors to complete the diary questionnaire as they visited Montana.

Visitors at Missoula were on the average traveling with approximately two people per vehicle. About one out of every four vehicles contained children. Many of the travelers were middle-aged and maintained professional, managerial, or sales occupations. Most of the other travelers at Missoula were retirees. The most common reported income was between \$30,000 and \$40,000. Less than 1/5 of the travelers during the winter season were here for vacation as a primary purpose. This perhaps explains the high percentage of visitors who have previously been to Montana. Rather than a primary vacation trip, many were simply passing through, visiting friends and family, or were on a business trip.

Travel Group Profile

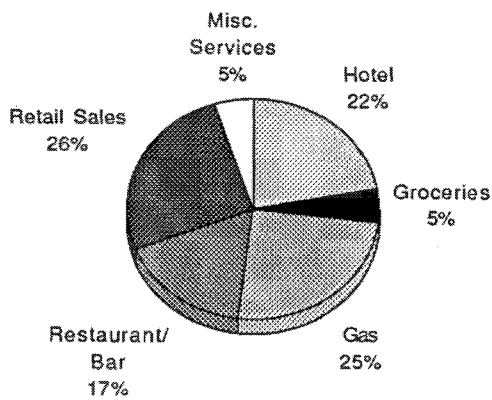
Adult Age (mean)	45 Years
Group Size (mean)	2.2
Adult Males	1.1
Adult Females	.8
Children	.3
Percent of Travelers with a Household Income of \$60,000 or More	31%
Percent of Respondents Who Have at Least a College Education	34%
Nights Spent in Montana (mean)	2.9
Daily Group Expenditure in Montana (mean)	\$95
Percent of Visitors Who Have Been to Montana Previously	96%
Percent of Visitors Who Will Return to Montana Within Two Years	98%

Travel Group Type through Missoula



Most visitors were traveling with family members. However, one out of every four traveled alone.

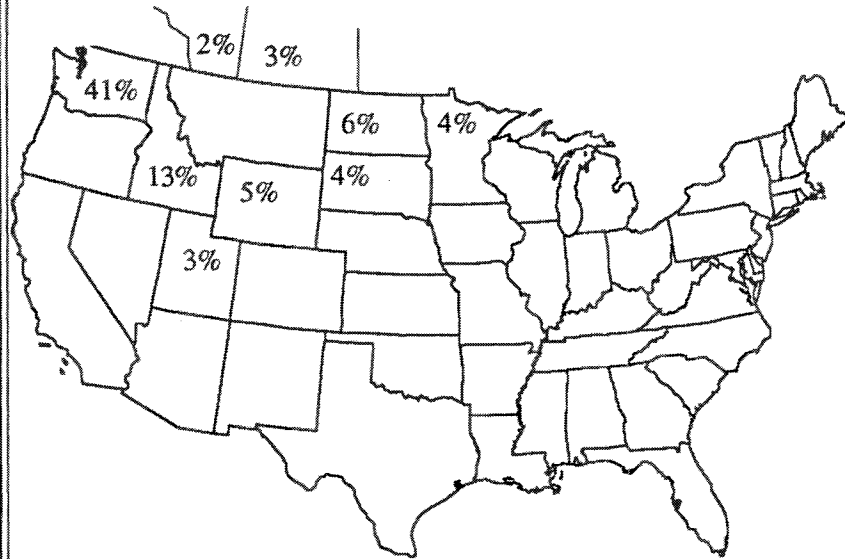
Types of Traveler Expenditures



Non-resident winter travelers at Missoula spent about \$95 per group per day in Montana. Visitors spent almost 4 days (3 nights) per trip; thus the average total trip expenditure per group was about \$368. Retail sales accounted for \$25 daily, followed by gasoline at \$24, accommodations at \$21, restaurants/bars at \$16, and groceries and miscellaneous at \$5 each.

Many of the travelers to Montana were from surrounding states. The largest proportion were from Washington. The remaining top places of visitor residence were the next closest states and provinces to our border, including Saskatchewan and Alberta.

State of Residence of Travel Group



Nearly 3/4 of the highway travelers at Missoula entered Montana from Idaho. Four out of the five interstate highway entrances accounted for nearly 90% of all non-resident travel group traffic.

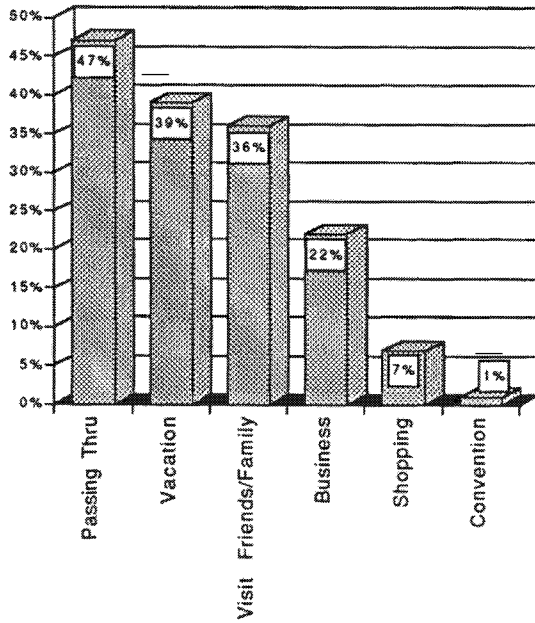
Location of Entry into Montana

I-90 at Idaho	62%
I-15 at Idaho	9%
I-90 at Wyoming	8%
I-94 at N. Dakota	8%
HW 12 at Idaho	3%
HW 200 at N. Dakota	2%
HW 23 at N. Dakota	1%
HW 241 at Saskatchewan	1%
Others at < 2% each	19%

Location of Exit from Montana

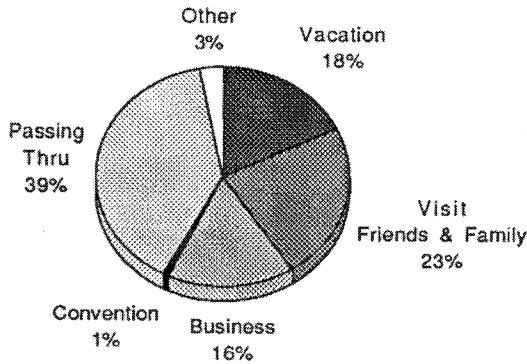
I-90 at Idaho	43%
I-90 at Wyoming	13%
I-94 at N. Dakota	12%
I-15 at Idaho	10%
HW 212 at Wyoming	3%
HW 12 at Idaho	2%
HW 87 at Idaho	2%
Others at < 2% each	12%

Purposes of Trip to Montana



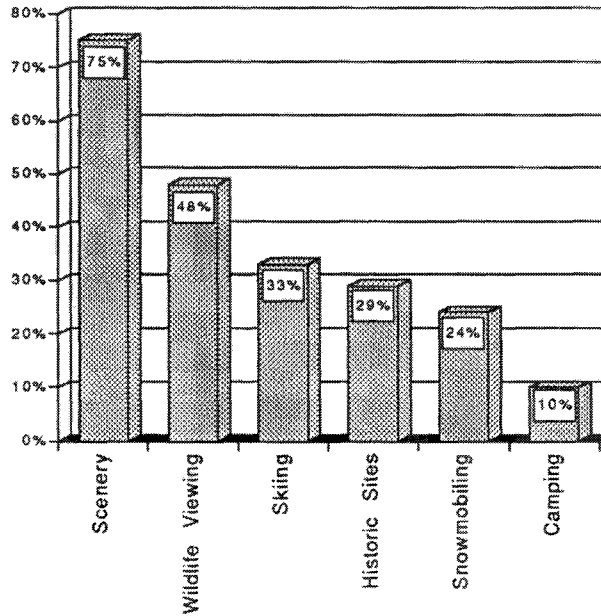
Note: Percentages add to greater than 100% because of multiple responses.

Primary Purpose for Trip to Montana



Many winter visitors to Montana were passing through, visiting friends & family, or were here for business reasons. Even though only 1/5 of the visitors listed vacation as the primary purpose for their trip to Montana, more than twice as many included vacation as part of their overall trip.

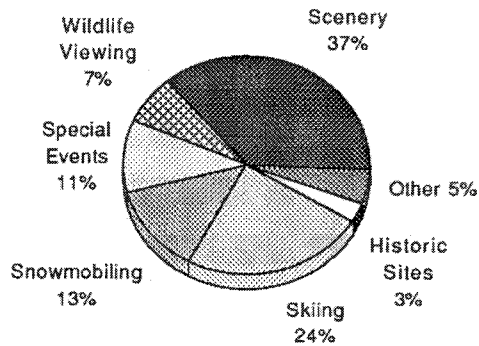
Attractions for Vacationers to Montana



Note: Percentages add to greater than 100% because of multiple responses.

The majority of vacationing travelers were in Montana because of scenic attraction. In fact, 1/3 of the vacationers traveled for the scenery as their primary attraction. Though wildlife viewing as a primary attraction was low in the winter, half of our vacationers watched for wildlife while traveling in Montana.

Primary Attractions for Vacationers to Montana



Recreation Activity Participation in Montana

Shopping	38%
Visiting Friends & Family	34%
Pleasure Driving	29%
Wildlife Viewing	29%
Gambling	13%
Visiting Yellowstone National Park	10%
Nature Photography	10%
Downhill Skiing	9%
Snowmobiling	9%
Visiting Historic Sites	8%
Visiting Museums	7%
Visiting a National Forest	5%
Cross-Country Skiing	4%
Sledding	3%
Traveling Historic Trails	3%
Visiting Glacier National Park	3%
Attending Special Event, Festival	2%
Wildland Dayhiking	2%
Nature Study	2%
Visiting Other National Park Area	2%
Skating/Hockey	2%
Picnicking	1%
Visiting a State Park	1%
Attending a Sporting Event	1%
Snowboarding	1%
Ice-Fishing	1%
No Recreation Participation	17%

Winter visitors at Missoula participated in diverse activities while in Montana. It is important to note that those activities with 2% or less participation are represented by only a few people in the sample. These activities are listed only to help identify all travel-related activities that occurred among visitors to Montana.

When analyzing a profile of visitors to a regional area, it is often useful to compare such data with the average visitors at the statewide level and to examine similarities and any dissimilarities. During the winter season, travelers at Missoula are very similar to the average statewide traveler.

Travel Group Profile Comparisons

<u>Traveler and Travel Group Characteristics</u>	<u>Missoula</u>	<u>State</u>
Adult Age (mean)	45 Years	46 Years
Group Size (mean)	2.2	2.4
Adult Males	1.1	1.2
Adult Females	.8	.9
Children	.3	.3
Percent of Travelers with a Household Income of \$60,000 or More	31%	31%
Percent of Respondents Who Have at Least a College Education	34%	43%
Nights Spent in Montana (mean)	2.9	2.7
Daily Group Expenditure (mean)	\$95	\$105
Percent of Visitors Who Have Been to Montana Previously	96%	96%
Percent of Visitors Who Will Return to Montana Within Two Years	98%	96%

Comparisons of Top Five

Top Five States of Residence:

<u>Missoula</u>		<u>State</u>	
Washington	41%	Alberta	20%
Idaho	13%	Washington	19%
North Dakota	6%	Idaho	8%
Wyoming	5%	Minnesota	7%
Minnesota	4%	North Dakota	7%

1/5 of the winter visitors to Montana at the statewide level are Canadian. It is interesting to note, however, that these visitors are not predominant among visitors to Montana at Missoula.

Top Five Entry Points into Montana:

<u>Missoula</u>		<u>State</u>	
I-90 - Idaho	62%	I-90 - Idaho	28%
I-15 - Idaho	9%	I-15 - Alberta	17%
I-90 - Wyoming	8%	I-15 - Idaho	13%
I-94 - North Dakota	8%	I-94 - North Dakota	11%
HW 12 - Idaho	3%	HW 93 British Col.	9%

Top Five Counties of Overnight Stay:

<u>Missoula</u>		<u>State</u>	
Gallatin	22%	Gallatin	34%
Flathead	19%	Flathead	18%
Missoula	16%	Yellowstone	11%
Yellowstone	10%	Missoula	7%
Park	5%	Cascade	7%

Top Five Winter Recreation Activities in Montana:

<u>Missoula</u>		<u>State</u>	
Shopping	38%	Shopping	41%
Visit Friends/Family	34%	Pleasure Driving	26%
Pleasure Driving	29%	Wildlife Viewing	25%
Wildlife Viewing	29%	Visit Friends/Family	25%
Gambling	13%	Gambling	18%

Comparisons with Statewide Data

Primary Trip Purpose:

When compared to the visitors around the state, travelers at Missoula were visiting friends and family more often and were less likely to be on a primary vacation trip. Passing through remained the highest reason for entering Montana for visitors in each category.

	<u>Missoula</u>	<u>State</u>
Passing Through	39%	31%
Visit Friends & Family	23%	18%
Vacation	18%	25%
Business	16%	16%
Convention/Meeting	1%	1%
Shopping	<1%	6%
Other	3%	3%

Primary Vacation Attraction:

Scenery and winter sports were each consistent primary vacation attractions for all visitors. However, visitors at Missoula were more apt to be attracted by scenery or landscape, while the average statewide visitors elsewhere were more apt to be attracted to Montana by snowmobiling.

	<u>Missoula</u>	<u>State</u>
Scenery/Landscape	36%	25%
Skiing	24%	27%
Snowmobiling	13%	25%
Special Events	11%	7%
Wildlife Viewing	7%	5%
Historic Places	3%	2%
Camping	<1%	1%
Other Opportunities	5%	8%

Travel Group Type:

	<u>Missoula</u>	<u>State</u>
Alone	27%	23%
Family	58%	56%
Friends & Family	7%	9%
Friends	5%	10%
Business Associates	3%	2%
Club or Group	<1%	<1%