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Eastern Montana Data Growth

2019 Initiative to Increase Data Collection

Kara Grau, M.S. & Megan Schultz, M.S.

July 2020



Eastern Montana Data Growth: 2019 Initiative to Increase Data Collection

Prepared by

Kara Grau, M.S. & Megan Schultz, M.S.

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

Research Report 2020-8

July 2020

This study was funded by the Lodging Facility Use Tax

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Abstract

The purpose of this project is to provide Eastern Montana, and in turn, the entire state, with more robust sample sizes of the nonresident data collected year-round by ITRR. Increased sample size will allow for data specific to Eastern Montana regions, counties, towns, and sites to be more representative, and therefore, more beneficial in understanding the state of nonresident travel in that area. Additional data was collected by restructuring and adding additional nonresident surveying in the Eastern Montana regions. Included in this report is a summary of data collected from Eastern Montana travelers in comparison with the full data set.

Highlights

- The additional surveyor provided in Eastern Montana to intercept nonresidents helped increase intercept numbers from 8% of all statewide intercepts in 2017 to 15% of all statewide intercepts in 2019.
- The average length of stay in Montana was 4.3 for all travelers compared to 4.9 for those who spent a night in Eastern Montana.
- Visitors from North Dakota and Minnesota were higher for the Eastern Montana segments compared to all travelers in Montana.
- Most activities and traveler characteristics between the Eastern Montana segments and all Montana travelers are similar and only account for small and insignificant differences.

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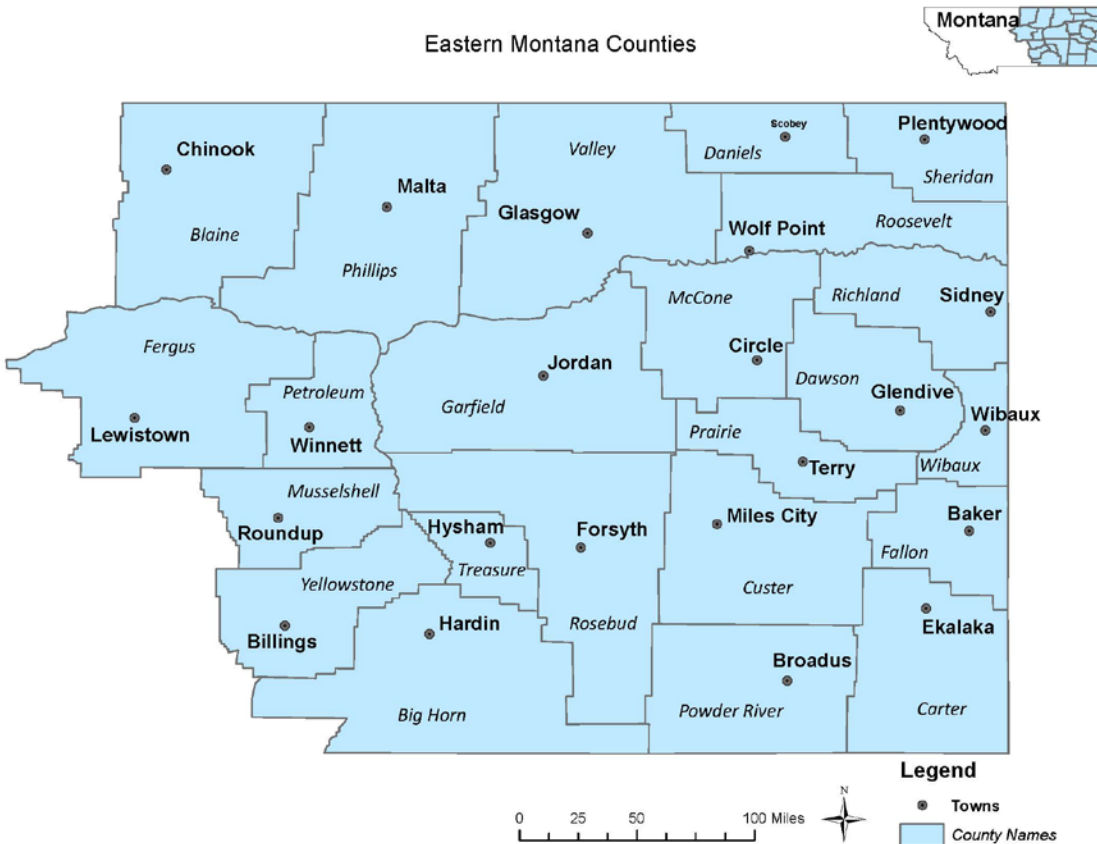
Introduction

Over the past few years, even before the COVID-19 pandemic, visitation to Eastern Montana has been on a decline as noticed by hoteliers and others in the tourism industry on the eastern side of the state. Many factors contribute to this decline including the reduction in the Bakken oil fields, Canadian exchange rate, and changes in marketing strategies. In addition, ITRR has had difficulty retaining surveyors in the Billings area, contributing to reduction in data to assist us in understanding the localized travel issues in Eastern Montana. Therefore, the Tourism Advisory Council Research Committee asked ITRR to enhance both their data collection and use of the interactive website so that those areas with lower sample sizes can have them increased to a useable and valid number for decision making.

Purpose

The purpose of this project is to provide Eastern Montana, and in turn, the entire state, with more robust sample sizes of the nonresident data collected year-round by ITRR. Increased sample size will allow for data specific to Eastern Montana regions, counties, towns, and sites to be more representative, and therefore, more beneficial in understanding the state of nonresident travel in the area. A deeper understanding of travel in the eastern part of the state will, in turn, assist businesses, marketing organizations, and state and local governments in enacting business decisions, legislation, and marketing that can support and enhance tourism-related opportunities in the area.

Figure 1: Area of 'Eastern Montana' Described in This Report



Methods

For FY20, the TAC approved a project that would increase data in the Eastern Montana area. Some of these funds were specifically for adding an additional surveyor in this area. After initial discussion of this importance at the October, 2018 Research Committee meeting, ITRR went ahead with hiring an additional surveyor.

ITRR divided the “Eastern MT” surveyor territory into two: 1) Missouri River (using our existing surveyor for Eastern MT who is based in Glasgow); and 2) Southeast MT (where we added a new surveyor based out of Glendive). This helped with being able to add surveying hours in two ways: we were able to cut down the drive time to survey locations as well as add additional surveying time.

In addition to hiring another surveyor, we also added some more survey sites/towns. ITRR now has better coverage along the Hi-Line (Malta and Chinook), and surveyors also talk with travelers in Circle. Additionally, ITRR has added some more survey locations (gas stations) in already surveyed towns. ITRR now has better coverage in that area and as a result has gotten more intercepts for Eastern Montana. Please keep in mind that we do often intercept travelers to that area in other parts of the state as well! So, for example, our Bozeman area surveyor could intercept someone who had spent time in Sidney on their way back to Washington.

Results

Comparing 2017 and 2019 Intercepts

First, we will look at comparing the 2017 surveyor intercepts with the 2019 surveyor intercepts where ITRR added the additional surveyor, territory, and locations. Below are two comparisons. The first table is comparing intercepts during Calendar Year 2017 to Calendar Year 2019 for each surveyor. The 2017 calendar year was used since we had added data in this area for only a partial year in 2018. The second table breaks out the two Eastern Montana survey regions.

Table 1: Eastern Montana Surveyor Intercepts

Year	Total Intercepts	% of Total Nonresident Surveys
2017	955	8%
2019	2,659	15%

Table 2: 2019 Intercepts by Eastern Montana Region

Year	Southeast MT	Missouri River	Total
2019	2,068	591	2,659

This next table shows differences in each location where nonresident intercepts occurred (site codes on the surveys) for 2017 and 2019 for those included in the Eastern Montana Data Initiative Region. A handful of sites in this region are covered by other surveyors in addition to what we consider “Eastern Montana.” The “Billings Area” surveyor covers Billings, Laurel, Crow Agency, and Broadus as far as towns in the Initiative go. The “Central Montana” surveyor covers Lewistown and Eddies Corner for the purposes of this report (this surveyor also covers many other locations).

Table 3: Intercept Location Differences between 2017 and 2019

Location (intercept site)	2017 Total Intercepts	2019 Total Intercepts
Nashua (8)	n/a	4
Plentywood (9)	32	31
Wolf Point (10)	25	44
Culbertson (11)	13	43
Glasgow (12)	102	168
Glendive (13)	271	804
Miles City (14)	152	853
Sidney (16)	298	411
Circle (18)	3	136
Broadus (19)	16	32
Billings Stations (21)	695	628
Crow Agency (24)	196	179
Laurel (25)	50	49
Billings Airport (60)	20	321
Malta (101)	n/a	70
Chinook (103)	n/a	95
Lewistown (111)	97	142
Eddie's Corner (112)	36	50

2019 Data: Comparing Eastern Montana Data with Statewide Data

From the 2019 Quarterly Nonresident data, below is a summary of results comparing the data of all travelers, statewide, with those travelers who were in Eastern Montana. The data from Eastern Montana travelers were filtered 3 ways for this report: travelers who entered the state via an Eastern Montana entry point; travelers who drove through Eastern Montana; and travelers who stayed overnight in Eastern Montana.

The full statewide survey sample size in 2019 was 12,036. This represents all completed on-site surveys collected throughout the state during the year. (Refer to Statewide Nonresident Travel Survey: Survey Methods & Data Analysis¹ for a full description of survey methods.) One of the Eastern Montana survey samples included in this analysis is also filtered from the full statewide, on-site sample: travelers who entered the state via an Eastern Montana entry point (n=3,714).

All on-site survey respondents are invited to take with them a postage paid envelope and survey and complete the additional questions in an effort to collect more comprehensive, detailed information about their trips. Two of the survey samples included in this report are filtered from the follow-up survey data: travelers who drove through Eastern Montana (n=1,290); and travelers who stayed overnight in Eastern Montana (n=699). It is important to note that these 3 filtered sets of Eastern

¹ Grau, K. 2018. Statewide Nonresident Travel Survey: Survey Methods & Data Analysis. <http://itrr.umt.edu/files/NonresTravelSurvey-Methods-Analysis.pdf>

Montana data analyzed for this report *are not discreet data samples*. Rather, this report provides several ways to look at data for those travelers who were in Eastern Montana, progressively narrowing down which travelers are included in the sample. While the samples included in this report did all pass through or stay in Eastern Montana, the travelers highlighted here may also have stayed in or traveled through other parts of Montana, as well, during their 2019 trip.

Traveler Characteristics

The following tables allow for comparison of the travelers who passed through or stayed in Eastern Montana (EMT) the eastern part of the state against the full sample of All Travelers. For ease, many of the tables below are sorted based on the All Travelers column to provide a consistent way of looking at the data throughout the report.

Who came to Montana?

Table 4: Overview of Sample Characteristics

	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
n=	3,714	1,290	699	12,036
Avg. Group Size	2.0	2.2	2.1	2.2
Avg. Length of Stay in MT	4.3	4.6	4.9	4.3
Visit MT Before?	86.9%	85.8%	88.3%	82.4%
Female	40.7	43.2	41.8	42.2
Male	59.3	56.8	58.2	57.8

Average travel group size and length of stay in the state are fairly consistent across groups, though it is interesting to note that travel groups staying a night or more in Eastern Montana do have the longest length of stay in the state and the highest rate of repeat visitors. (Table 4)

Table 5: Age Categories Represented in Travel Groups

	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
0-5 years	4.6%	5.4%	3.8%	5.8%
6-10 years	5.5%	6.5%	6.4%	6.3%
11-17 years	8.3%	9.4%	7.7%	9.4%
18-24 years	5.6%	5.8%	5.8%	7.2%
25-34 years	15.2%	15.0%	14.0%	14.8%
35-44 years	16.7%	14.7%	13.4%	16.2%
45-54 years	20.8%	19.8%	17.6%	21.3%
55-64 years	34.7%	35.4%	39.0%	34.6%
65-74 years	27.8%	32.1%	32.7%	31.5%
75 and over	9.0%	10.0%	11.1%	9.8%

*Percentages within columns will not add to 100%; respondents can select all applicable age categories.

Table 6: Traveler Household Income

	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Less than \$50,000	18.8%	17.7%	15.5%	16.4%
\$50,000 to less than \$75,000	17.7%	19.5%	20.3%	18.8%
\$75,000 to less than \$100,000	23.8%	22.6%	21.9%	22.2%
\$100,000 to less than \$150,000	22.1%	22.1%	23.6%	22.7%
\$150,000 to less than \$200,000	9.7%	10.0%	11.1%	9.2%
\$200,000 or greater	7.9%	8.1%	7.6%	10.7%

Figure 1 highlights the main purpose of travelers in Montana. Travelers who entered via Eastern Montana indicated vacation (26%), the least of all vacationers to Montana, while selecting passing through (31%) or business (17%) as their main purpose at a higher rate than the other samples. Those travelers who spent at least one night in Eastern Montana were the least likely to be in the state simply to pass through, and were here to visit friends or relatives (18%) as their primary purpose at a higher rate than the other samples (29%) of visitors.

Travelers who entered the state via Eastern Montana were more likely to have come on their own, compared to the other samples (38.7% solo travelers), and in turn, were less likely to have entered the state as a couple (26.4%) in comparison. Aside from these differences between the samples within the individual and couple traveler group types, the 4 samples are quite similar when comparing the other types of travel groups. (Table 7)

Figure 2: Main Purpose of Travel in Montana

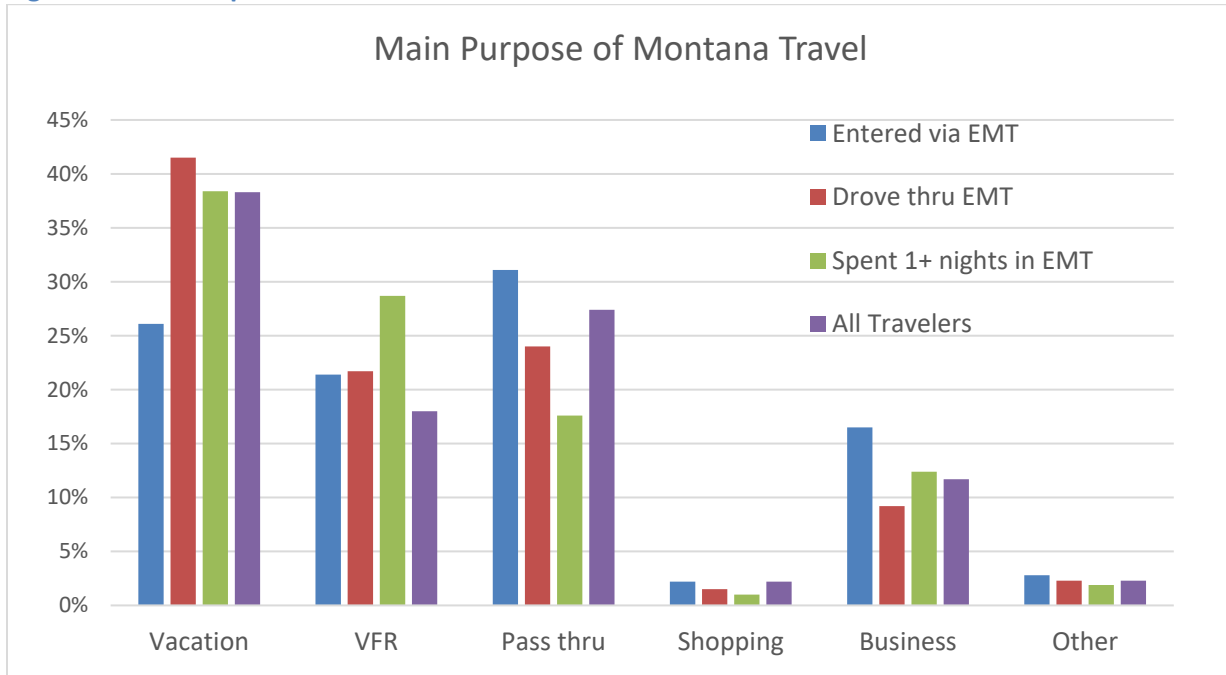


Table 7: Travel Group Type

Group Type:	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Self	38.7%	27.3%	30.6%	30.6%
Couple	26.4%	39.0%	37.5%	33.0%
Immediate Family	24.4%	25.8%	23.6%	25.6%
Extended Family	0.9%	1.1%	1.5%	1.8%
Family & Friends	2.0%	2.2%	2.5%	2.5%
Friends	4.6%	3.9%	3.8%	4.7%
Business Associates	2.7%	0.4%	0.3%	1.7%
Organized Group or Club	0.2%	0.2%	0.2%	0.1%

Traveler arrivals to Montana

Table 8 provides a comparison of where travelers entered the state, with any entry points indicating 5% or more of the time bolded for easier comparison.

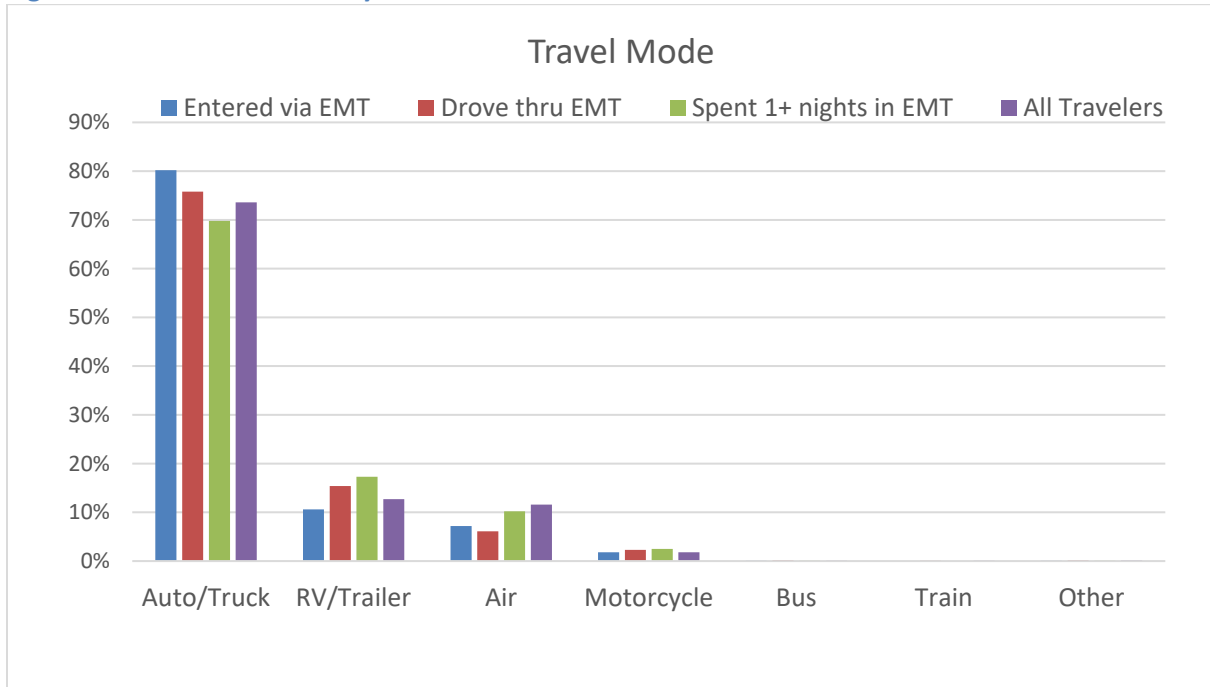
Figure 2, below, provides a comparison of travel modes used to enter Montana. Travelers who spent a night or more in the eastern part of the state were a bit less likely to have entered in a car or truck (70%) compared to the other samples, and were more likely to have come in an RV or with a trailer (17%).

Table 8: Entry Point to Montana

	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Superior		8.8%	10.2%	12.3%
Targhee Pass		6.2%	7.9%	8.8%
West Yellowstone		6.2%	6.9%	7.6%
Lodge Grass	22.8%	12.8%	11.3%	7.1%
Fairview	22.4%	9.5%	9.4%	7.0%
Monida		2.0%	1.9%	6.2%
Wibaux/Beach	18.8%	12.0%	11.2%	5.8%
Gardiner		4.5%	2.5%	5.8%
Bozeman Air		0.6%	8.2%	4.0%
Bridger 72		3.4%	2.9%	2.8%
Culbertson/Bainville	8.1%	5.1%	0.2%	2.5%
Rooseville		0.4%	0.3%	2.4%
Billings Air	7.3%	4.6%	1.9%	2.3%
Alzada	7.3%	5.4%		2.2%
Bridger 310		3.0%	0.6%	2.1%
Missoula Air		0.8%	1.3%	2.0%
Raynolds Pass		1.5%	1.0%	2.0%
Troy		1.7%	1.1%	1.9%
Kalispell Air		0.1%	0.2%	1.9%
Sidney	6.1%	2.2%	2.1%	1.9%

*Table includes entry points representing 1% or more of any of the 4 data samples.

Figure 3: Travel Mode of Entry into the State



Primary residence of travelers is displayed in Table 9, with any percentages 5% or higher highlighted in bold for easier comparisons. Not surprisingly, North Dakota represents a higher percentage of respondent residence for the three samples filtered for those who entered through Eastern Montana, who passed through or spent time in the eastern part of the state than for the full sample of all statewide travelers. Likewise, Minnesota and Wyoming tend to be higher for these samples. However, for travelers who spent one night or more in Eastern Montana, a primary residence of Wyoming is actually lower than for the full sample of all travelers.

Table 9: Primary Residence of Travelers

	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Washington	5.0%	6.8%	9.0%	10.0%
North Dakota	25.5%	13.8%	13.1%	9.1%
Idaho	3.4%	4.1%	6.3%	8.5%
Wyoming	8.8%	8.1%	5.7%	6.8%
California	1.6%	2.9%	4.4%	6.1%
Alberta, Canada	1.3%	2.3%	3.1%	5.3%
Colorado	5.8%	4.8%	4.5%	4.4%
Minnesota	7.5%	9.1%	8.2%	4.1%
Texas	3.6%	2.0%	1.7%	3.5%
Utah	0.9%	1.4%	0.8%	3.5%
Oregon	1.4%	3.1%	4.1%	2.9%
Florida	1.9%	2.5%	2.7%	2.3%
Arizona	1.6%	1.7%	1.9%	2.3%
Wisconsin	3.1%	4.0%	2.9%	2.1%
British Columbia, Canada	0.4%	0.3%	0.3%	1.9%
Illinois	1.9%	2.8%	1.9%	1.8%
Michigan	1.9%	2.7%	2.7%	1.6%
Ohio	1.3%	1.6%	0.6%	1.4%
Saskatchewan, Canada	2.2%	2.0%	2.1%	1.3%
Pennsylvania	1.6%	1.3%	2.0%	1.3%
South Dakota	2.7%	2.9%	3.2%	1.3%
Nevada	0.7%	1.9%	2.1%	1.2%
Missouri	1.4%	1.6%	1.8%	1.1%
New York	0.6%	0.5%	0.6%	1.1%
North Carolina	0.8%	0.7%	0.4%	0.9%
Iowa	1.3%	2.4%	2.1%	0.9%

*Table includes states and provinces representing 2% or more of any of the 4 data samples.

Where do travelers go in the State?

Figure 3 displays the percentage of all nights spent in Montana by each of the 4 samples within each of the 6 Montana travel regions. Amongst all travelers, nights spent in the eastern part of the state tend to make up the smallest percentage of their nights in Montana. For the sample of travelers who stayed a night or more in Eastern Montana, a full 36% of their nights in the state were spent in Southeast Montana Region, 17% in Central Montana (part of which is considered as Eastern Montana for this Initiative), and another 11% in Missouri River Country. These travelers still spent nights in the other travel regions as well, but at a much lower rate than the other samples.

Figure 4: Percent of Traveler Nights Spent in Montana Regions

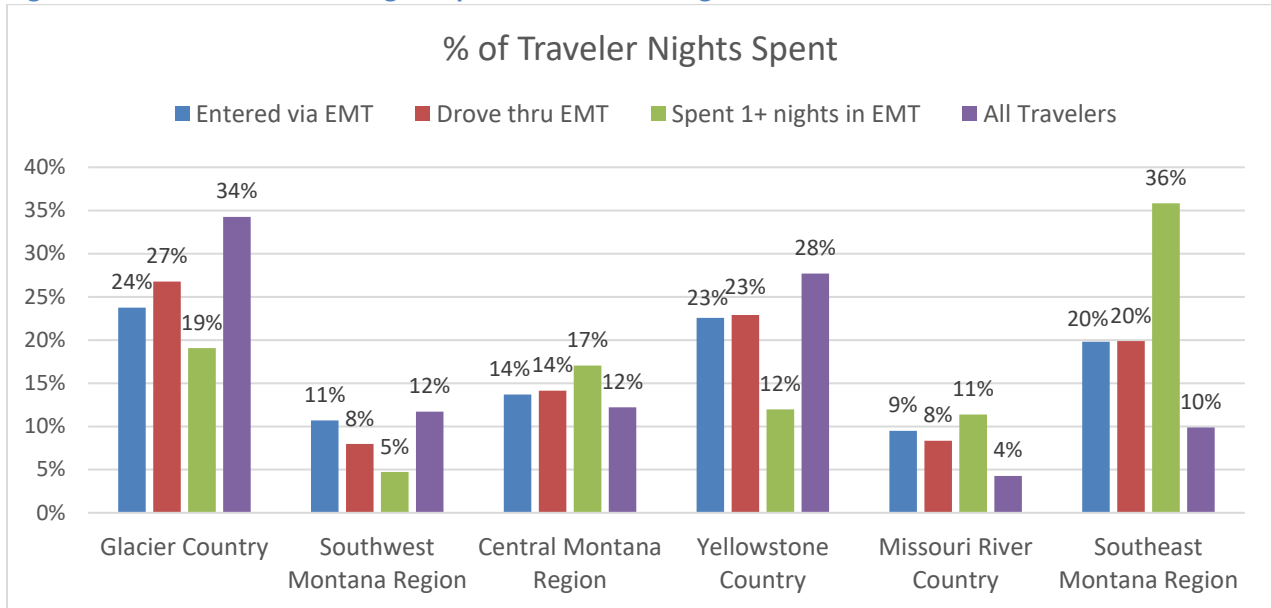


Table 10: Percent of Traveler Nights Spent in Various Accommodation Types in Montana

	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Hotel/motel	35.4%	35.9%	39.4%	34.4%
Home/condo/cabin of friend/relative	29.0%	25.2%	28.2%	24.1%
Private campground	8.5%	13.7%	14.1%	11.6%
Rented entire cabin/home	7.1%	5.9%	2.9%	8.5%
Public land camping	7.7%	8.5%	5.8%	7.6%
My second home/condo/cabin	4.3%	2.7%	1.2%	4.6%
Other	2.3%	2.9%	3.1%	2.8%
Resort/condominium	2.3%	1.8%	1.4%	2.4%
Bed & Breakfast	0.7%	0.8%	0.9%	1.4%
Vehicle in parking area	1.7%	1.9%	2.5%	1.3%
Guest ranch	0.4%	0.2%	0.1%	0.9%
Rented room in home	0.7%	0.5%	0.2%	0.5%

Tables 10 (above) and 11 (below) provide information about accommodations used by travelers and their booking methods for those accommodations. Hotel/motel and staying with a friend or family member are the most common responses, across the board, and so it follows that contacting an accommodation directly for booking, booking method not being applicable are the most common responses in Table 11.

Table 11: Booking Methods for Nights Spent in Montana

	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Contacted accommodation directly (i.e., called hotel, used business website)	31.7%	36.2%	37.0%	35.0%
N/A (no cost)	31.9%	26.5%	27.6%	27.1%
Booked using online travel agent site (e.g., Expedia, trivago)	11.4%	12.9%	13.2%	13.3%
Walked-in	14.2%	13.9%	14.1%	11.4%
Other	5.8%	5.7%	4.9%	5.9%
Booked through Airbnb	3.0%	2.8%	2.2%	3.9%
Booked through VRBO/HomeAway	2.1%	2.0%	0.9%	3.5%

How are travelers’ plans made?

For travelers who came to Montana, at least in part, for vacation, Table 12 displays what most attracted them to the state. While Glacier National Park attracted a high percentage of travelers in all of the samples, Yellowstone National Park was less of a factor for those who entered via Eastern Montana. Family and friends was a strong attractor for those who stayed a night or more in Eastern Montana. Hunting was reported more by travelers included in the Eastern Montana filtered samples than for all travelers.

Table 12: Travelers' Main Attraction to Montana

What attracted you most to MT?	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Glacier National Park	18.1%	21.9%	19.2%	23.3%
Yellowstone National Park	6.1%	13.8%	12.1%	17.4%
Family/friends	16.9%	15.3%	20.1%	12.7%
Mountains/forests	14.4%	12.1%	10.4%	10.6%
Open space/uncrowded areas	10.7%	10.1%	10.3%	10.1%
Skiing/snowboarding	4.5%	2.6%	1.7%	3.9%
Hunting	9.7%	5.7%	8.6%	3.7%
Fishing	2.2%	2.2%	1.0%	3.4%
Lakes	2.0%	1.2%	0.3%	2.2%
Wildlife	1.6%	1.3%	1.9%	1.9%
Other Montana history & culture	1.3%	2.3%	3.0%	1.7%
Camping	2.0%	1.6%	1.0%	1.6%
Native American history & culture	0.9%	2.4%	3.7%	1.4%
Special events	2.8%	1.6%	1.8%	1.3%
Rivers	1.8%	1.6%	2.4%	1.2%
Hiking	1.7%	1.0%	0.3%	1.1%
Lewis & Clark history	1.2%	1.3%	0.4%	0.7%
Resort/guest ranch	0.4%	0.2%	0.1%	0.6%
A Montana State Park	0.8%	0.6%	1.0%	0.5%
Northern Great Plains/Badlands	0.4%	0.9%	0.6%	0.4%
Snowmobiling	0.6%	0.3%	0.0%	0.2%

Tables 13 and 14 (below) show what information sources were used by travel groups to plan their trip. Respondents can select all information sources they used (Table 13) and then select which of those sources was most useful in planning their trip (Table 14). In general, trip planning information sources used are quite similar, across the board.

Table 13: Information Sources Used for Trip Planning

Prior to your visit, what information sources....	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Search engine	41.6%	44.0%	42.6%	47.0%
Used no sources	35.4%	30.6%	28.7%	29.2%
Info from friend/relative living in MT	18.7%	20.4%	22.7%	18.1%
National Park brochure/book/website	12.2%	17.3%	14.3%	17.9%
Info from previous visitor(s) to MT	15.0%	17.2%	14.5%	16.7%
Montana state tourism website	14.6%	14.3%	13.2%	13.9%
Mobile Apps	9.8%	12.8%	11.5%	11.8%
Consumer reviews online	8.5%	9.1%	8.6%	10.5%
Social networking site (i.e., Facebook)	7.0%	8.8%	8.7%	8.9%
Other travel websites	4.4%	5.8%	6.2%	6.0%
Automobile club (i.e., AAA)	4.9%	6.4%	7.3%	6.0%
Used no sources listed	5.8%	5.5%	6.8%	5.8%
On-line video (i.e., YouTube)	3.8%	4.7%	4.5%	4.9%
Guide book (not auto club book)	2.6%	4.3%	3.4%	4.7%
State Park brochure/website	3.4%	3.7%	3.6%	4.4%
Magazine/newspaper article online	3.1%	5.3%	4.5%	4.0%
Official MT guidebook magazine	3.8%	5.1%	4.3%	4.0%
Regional MT travel guide(s)	4.6%	3.9%	4.4%	3.7%
Magazine/newspaper articles	2.2%	2.8%	3.7%	3.2%
Info. from private business	2.0%	2.8%	3.5%	3.1%
Professional online travel reviews	1.5%	1.7%	2.2%	2.7%
Online travel agent (e.g., Travelocity)	3.0%	2.7%	2.7%	2.6%
"Made in Montana" website	1.7%	2.2%	2.2%	1.6%
MT community travel guide(s)	1.5%	1.5%	1.9%	1.5%
Information from special events	0.9%	1.2%	1.8%	1.1%
Called a MT visitor info line/center	1.2%	1.2%	1.1%	1.0%
Billboards	1.1%	1.3%	1.6%	0.7%
Montana advertising campaign	0.3%	0.5%	0.4%	0.5%

Table 14: Most Useful Information Source Used for Trip Planning

Most useful trip planning info source	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Search engine	28.0%	27.1%	28.0%	28.4%
Used no sources	25.2%	22.7%	21.5%	21.4%
Info. from friend/relative living in MT	13.3%	14.2%	16.5%	12.0%
Info. from previous visitor(s) to MT	4.5%	4.7%	3.4%	5.4%
National Park brochure/book/website	3.1%	4.5%	3.9%	5.0%
Official MT website	4.9%	4.6%	4.9%	4.2%
Mobile Apps	3.7%	3.2%	2.4%	3.0%
Other	3.1%	2.6%	3.9%	2.8%
Automobile club	1.6%	3.4%	3.1%	2.6%
Consumer online reviews	1.3%	1.4%	1.2%	2.0%
Guide book	0.6%	1.2%	0.7%	1.7%
Other travel websites	0.9%	1.0%	1.3%	1.4%
Info from private business	0.7%	1.2%	1.8%	1.2%
Official MT guidebook	1.8%	2.0%	0.9%	1.2%
Online travel agent (e.g., Travelocity)	1.8%	1.0%	1.4%	1.1%
Social media	1.1%	0.7%	1.1%	1.0%
Professional online travel reviews	0.1%	0.2%	0.6%	0.5%
Regional MT travel guide(s)	0.5%	0.4%	0.3%	0.5%
Online Video	0.2%	0.1%	0.3%	0.5%
State Park brochure/website	0.3%	0.3%	0.3%	0.5%
Info from special events	0.2%	0.2%	0.1%	0.3%
Magazine/newspaper article online	0.2%	0.3%	0.1%	0.3%
Magazine/newspaper article	0.2%	0.2%	0.2%	0.2%
MT community travel guide(s)	0.1%	0.1%	0.1%	0.1%
Billboards	0.3%	0.1%	0.0%	0.1%
Called a MT visitor info. line/center	0.2%	0.1%	0.1%	0.1%
"Made in Montana" website	0.1%	0.1%	0.1%	0.1%

Tables 15 and 16 show information sources used by travelers during their trip in Montana. Much like information sources used to plan the trip before coming to Montana are similar for all, information sources used by travelers while in Montana do not vary much, whether looking at Table 15 (all sources used during trip) or 16 (most useful source during trip).

Table 15: Information Sources Used During Trip

On trip, info sources	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Map applications (i.e., Google Maps)	46.2%	49.6%	47.7%	47.7%
Search engine (e.g., Google)	34.9%	36.6%	37.3%	38.6%
Used no sources	26.9%	22.6%	21.6%	22.4%
National Park brochure/book/website	13.5%	20.5%	18.9%	22.1%
Info. from friend/relative living in MT	18.2%	17.6%	20.2%	16.0%
Official highway information signs	16.2%	17.1%	15.4%	14.9%
Visitor information center staff	9.4%	13.3%	11.1%	13.9%
Mobile Apps	10.0%	11.1%	12.0%	11.6%
Brochure information rack	6.6%	10.4%	10.0%	8.7%
Consumer online reviews (i.e., TripAdvisor)	7.0%	7.5%	6.4%	7.9%
Info. from private business (e.g., resort/motel/attraction)	4.8%	7.3%	7.1%	7.1%
Regional MT travel guide(s)	6.3%	6.2%	6.0%	5.5%
Billboards	6.1%	6.2%	5.1%	5.3%
Official MT website (VisitMT.com)	5.8%	5.0%	3.8%	5.0%
State Park brochure/website	3.9%	4.9%	3.9%	5.0%
Social media (i.e., Facebook)	3.9%	4.1%	4.9%	4.8%
Other	4.7%	4.9%	5.9%	4.8%
Official MT Guidebook Magazine	3.5%	6.0%	6.5%	4.4%
Guide book (i.e., Frommer's, Lonely Planet)	1.6%	2.7%	2.1%	3.0%
MT community travel guide(s)	2.2%	3.1%	3.2%	2.7%
"Made in Montana" website	1.2%	1.0%	0.8%	0.7%

Table 16: Most Useful Information Source Used During Trip

While traveling, most useful info source	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Map applications (i.e., Google Maps)	28.8%	28.9%	28.8%	27.6%
Search engine (e.g., Google)	17.7%	16.2%	17.2%	16.7%
Used no sources	17.5%	16.1%	14.6%	15.2%
Info. from friend/relative living in MT	9.7%	9.2%	11.7%	9.0%
National Park brochure/book/website	2.9%	5.6%	5.4%	6.9%
Visitor information center staff	3.2%	3.1%	3.7%	3.0%
Official highway information signs	4.2%	3.2%	2.4%	2.9%
Mobile apps	2.9%	3.2%	4.5%	2.7%
Other	2.4%	1.8%	2.1%	2.5%
Info. from private business (e.g., resort/motel/attraction)	1.0%	1.5%	1.3%	2.2%
Consumer online reviews (i.e., TripAdvisor)	0.9%	1.7%	1.2%	2.0%
Official MT website (VisitMT.com)	1.8%	1.6%	1.1%	1.3%
Guidebook (i.e., Frommer's, Lonely Planet)	0.9%	0.8%	0.4%	1.3%
Regional MT travel guide(s)	1.6%	1.4%	1.3%	1.3%
Official MT Guidebook magazine	1.2%	1.5%	1.1%	1.0%
Brochure information rack	1.0%	1.3%	1.0%	1.0%
Social media (i.e., Facebook)	0.6%	0.4%	0.4%	0.7%
Billboards	0.3%	0.7%	0.1%	0.6%
State Park brochure/website	0.2%	0.1%	0.1%	0.3%
MT community travel guide(s)	0.3%	0.3%	0.2%	0.2%

What do travelers do?

The following tables allow us to look at what differences may exist in activities participated in by travelers who spent time in Eastern Montana compared to all Montana travelers, as well as any differences in sites visited during their trip. Be aware that activities listed by visitors are ALL activities while in Montana, and were not necessarily done in Eastern Montana. However, the variety of activities engaged in still provides a profile of the type of person who does spend some time in the eastern part of the state. Not surprisingly, scenic driving is the activity most frequently selected by all travelers, both statewide and those included in the Eastern Montana samples. Those who spent one night or more indicated attending festivals and events at a slightly higher rate than all travelers but overall, there were very few differences between the Eastern Montana segments and all travelers.

Table 17: Travelers' Activities in Montana

Activities	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Scenic driving	49.4%	57.4%	54.2%	55.0%
Day hiking	33.2%	35.6%	31.5%	38.8%
Wildlife watching	27.9%	33.0%	31.3%	34.2%
Nature photography	26.1%	30.1%	25.6%	30.6%
Recreational shopping	26.3%	25.8%	26.2%	26.0%
Car/RV camping	21.7%	29.3%	29.5%	25.5%
Visit local brewery	21.0%	19.5%	19.3%	18.4%
Visit other historical sites	16.2%	20.1%	19.6%	16.2%
Visit museums	9.7%	13.3%	13.2%	12.4%
Fishing/fly fishing	8.3%	9.1%	7.5%	10.0%
Visit Lewis & Clark sites	10.4%	13.2%	13.4%	9.9%
Visit farmers market	6.6%	8.3%	8.4%	7.7%
Attend festivals/ events	8.6%	8.5%	12.4%	7.5%
Visit Indian reservations	6.8%	7.6%	9.9%	6.2%
Birding	5.1%	6.5%	7.2%	5.2%
View art exhibits	5.1%	4.9%	5.3%	5.0%
River rafting/floating	3.5%	3.7%	4.3%	4.3%
Skiing/snowboarding	2.6%	1.8%	0.6%	4.2%
Canoeing/kayaking	4.3%	3.9%	2.4%	4.0%
Visit local distillery	3.8%	3.2%	2.7%	3.9%
Golfing	4.0%	2.3%	3.5%	3.6%
Horseback riding	3.8%	3.8%	3.8%	3.6%
Hunting	7.3%	4.9%	6.3%	3.3%
Motorcycle touring	4.2%	3.7%	4.2%	3.1%
Bicycling	2.9%	3.3%	2.6%	3.0%
Dinosaur attraction	2.5%	3.3%	3.6%	2.6%
Rockhounding	2.1%	3.1%	3.2%	2.5%
Sporting event	3.1%	2.1%	2.1%	2.4%
Motorboating	0.9%	0.8%	1.1%	2.1%
Backpacking	3.2%	1.9%	1.5%	2.0%
OHV/ATV	2.7%	2.4%	2.8%	1.9%
Attend a wedding	3.1%	2.7%	2.5%	1.9%
Attend performing arts	1.9%	1.3%	1.5%	1.7%
Mountain biking	1.1%	1.9%	0.7%	1.6%
Cross country skiing	1.0%	0.7%	0.3%	1.2%
Rock climbing	1.0%	1.5%	1.3%	1.2%
Snowmobiling	0.8%	0.5%	0.1%	0.9%
Geocaching	0.8%	0.8%	0.9%	0.8%
Snowshoeing	0.4%	0.3%	0.0%	0.7%
Road/tour bicycling	0.4%	0.4%	0.4%	0.7%

The most commonly visited sites for all samples are fairly similar, though some differences are notable. For example, visiting the C.M. Russell National Wildlife Refuge is quite popular amongst those who stayed a night or more in Eastern Montana, while visiting the Bob Marshall Wilderness Complex is not in comparison to all Montana travelers or the other two filtered samples.

Table 18: Sites Visited by Travelers in Montana

	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Big Hole Battlefield	31.0%	47.0%	43.9%	51.7%
Bighorn Canyon Nat'l Recreation Area	40.2%	39.3%	36.1%	41.7%
Bob Marshall Wilderness Complex	15.3%	11.3%	5.0%	13.1%
C.M. Russell Museum, Great Falls	11.3%	10.0%	9.5%	11.3%
C.M. Russell National Wildlife Refuge	19.2%	18.8%	22.8%	10.7%
Clark Canyon Reservoir	12.4%	10.5%	10.5%	9.5%
Flathead Lake State Parks	3.7%	5.3%	5.7%	7.3%
Fort Peck Lake	5.6%	5.4%	5.4%	5.2%
Ft. Peck Interpretive Center & Museum	3.9%	3.9%	4.3%	4.9%
Ghost towns	3.0%	3.6%	3.6%	4.4%
Glacier National Park	4.0%	4.6%	3.9%	3.7%
Grizzly & Wolf Discovery Center, West Yellowstone	10.9%	6.9%	7.1%	3.5%
Hot springs	5.2%	6.2%	8.3%	3.5%
Lewis & Clark Caverns State Park	4.4%	3.0%	2.2%	3.5%
Lewis & Clark Interpretive Center, Great Falls	4.3%	3.7%	2.5%	3.4%
Little Bighorn Battlefield	5.5%	6.3%	7.4%	3.1%
Lolo Pass Interpretive Center	3.6%	4.7%	7.1%	3.0%
Makoshika State Park	3.1%	3.7%	2.4%	2.8%
Missouri Headwaters State Park	3.8%	2.9%	4.4%	2.7%
Missouri River Breaks Nat'l Monument	3.5%	2.5%	1.3%	2.2%
Montana Historical Museum, Helena	4.1%	2.1%	2.3%	1.8%
Museum of the Rockies, Bozeman	1.9%	2.3%	2.0%	1.7%
National Bison Range	4.2%	3.7%	3.5%	1.6%
Other Montana state parks	3.3%	2.9%	4.9%	1.6%
Pompey's Pillar	1.9%	1.4%	1.1%	1.4%
Rocky Mountain Elk Foundation	1.2%	1.5%	1.5%	1.3%
Virginia City/Nevada City	2.7%	1.9%	2.2%	1.1%

Some other characteristics of travel in Montana are displayed in Table 19. The intent to re-visit Montana within 2 years is high among all groups. The biggest difference shows in the percent of all travelers who flew on a portion of their overall trip (22%) which is much higher than any of the Eastern Montana segments which are between 11 and 15%.

Table 19: Other Characteristics of Montana Travel

	Entered via EMT	Drove thru EMT	Spent 1+ nights in EMT	All Travelers
Hired an outfitter	3.0%	2.9%	3.7%	4.4%
Plan return visit w/in 2 years	88.9%	84.2%	87.3%	84.4%
Own 2nd property in MT	5.5%	4.2%	3.5%	4.9%
Fly on any portion of trip	13.6%	11.2%	15.1%	22.1%

Discussion

The efforts undertaken by ITRR to increase data collection and sample size in Eastern Montana certainly did prove successful, to a degree. ITRR is always monitoring data collection around the state so that adjustments can be made, should the need arise, and will continue to do so. Forthcoming efforts to provide new and dynamic ways of filtering and viewing the nonresident travel data will improve access to the data in more flexible ways than in the past. Additionally, the forthcoming annual report highlighting nonresident travel spending will more accurately represent spending in the Eastern Montana region, which is often a limitation due to smaller sample sizes. These forthcoming projects are expected to be available during summer, 2020.