

# 2020 Research Summit

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Economist & Associate Director, ITRR



# Outline of ITRR Research

- Survey Development
  - Being Critical Consumers of Data & Research
  - Collecting meaningful data
  - Common pitfalls
- Building a Research Question
  - Coin Flipping
- 5-yr Review of Research Reports Available
- Quarterly Nonresident Travel Data
- Survey Kits
- Interactive Data and Report Building

# Survey Development

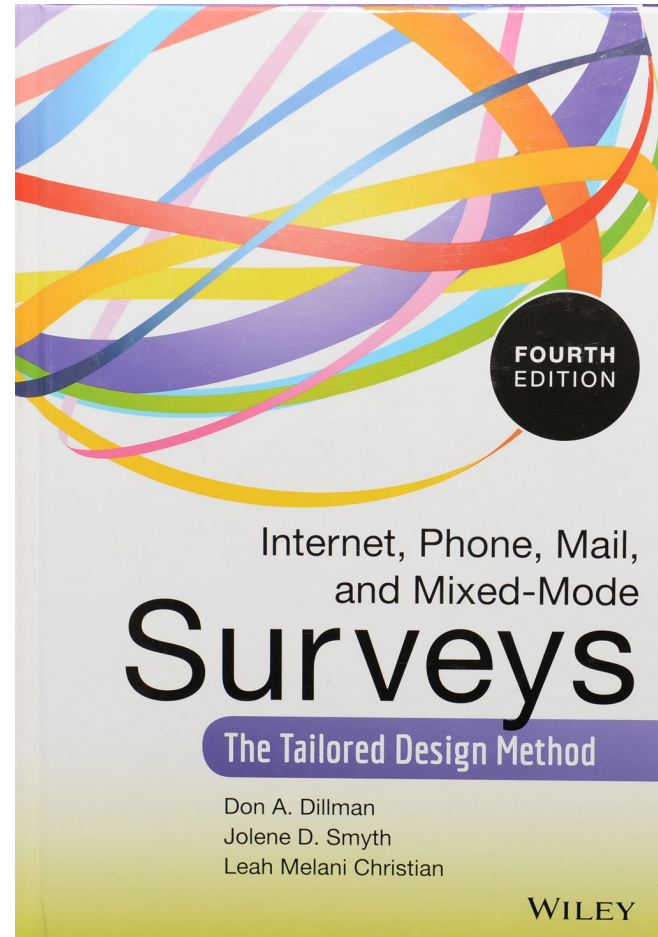
- Why do we survey?
- Survey Modes
- Coverage and Sampling
- Crafting Good Questions

# Why Do We Survey

- Efficient tool for learning about people's opinions, preferences, spending, voting, and behaviors.
- Confidently estimate the characteristics of millions of people by collecting information from only a few hundred or thousand.
  - To estimate within 5 percentage points, the preference of 100 million voters, we need about 400 randomly selected voters. Within 3 percentage points, about 1,150 voters.

# Survey Modes

- Telephone
- Mail back
- Intercept
- Internet
  - Email
  - Links
  - Social Media
- Mixed Mode



# Coverage and Sampling Important Definitions

- Survey Population
- Sample Frame
- Sample
- Completed Sample
- Coverage Error
- Sampling Error
- Selection Bias
- Nonresponse Bias

# Coverage and Sampling

## Important Definitions

- **Survey Population**
- Sample Frame
- Sample
- Completed Sample
- Coverage Error
- Sampling Error
- Selection Bias
- Nonresponse Bias

Consists of all the units (individuals, households, businesses) to which one desires to generalize the survey results.

# Coverage and Sampling

## Important Definitions

- Survey Population
- **Sample Frame**
- Sample
- Completed Sample
- Coverage Error
- Sampling Error
- Selection Bias
- Nonresponse Bias

List from which a sample is to be drawn in order to represent the survey population.



# Coverage and Sampling Important Definitions

- Survey Population
- Sample Frame
- **Sample**
- Completed Sample
- Coverage Error
- Sampling Error
- Selection Bias
- Nonresponse Bias

All units of the population that are drawn for inclusion in the survey.

# Coverage and Sampling Important Definitions

- Survey Population
- Sample Frame
- Sample
- **Completed Sample**
- Coverage Error
- Sampling Error
- Selection Bias
- Nonresponse Bias

All units that complete the questionnaire.

# Coverage and Sampling

## Important Definitions

- Survey Population
- Sample Frame
- Sample
- Completed Sample
- Coverage Error
- Sampling Error
- Selection Bias
- Nonresponse Bias

Results from every unit in the survey population not having a known, nonzero chance of being included in the sample.

# Coverage and Sampling

## Important Definitions

- Survey Population
- Sample Frame
- Sample
- Completed Sample
- Coverage Error
- **Sampling Error**
- Selection Bias
- Nonresponse Bias

The result of collecting data from only a subset, rather than all, of the members of the sampling frame

# Coverage and Sampling Important Definitions

- Survey Population
- Sample Frame
- Sample
- Completed Sample
- Coverage Error
- Sampling Error
- **Selection Bias**
- Nonresponse Bias

Introduced when selection of units from the population does not achieve randomness, thus sample is not representative of the population.

# Coverage and Sampling Important Definitions

- Survey Population
- Sample Frame
- Sample
- Completed Sample
- Coverage Error
- Sampling Error
- Selection Bias
- **Nonresponse Bias**

Results when respondents differ in meaningful ways from nonrespondents.

# Example – Purchased Business Email Lists

- **Population:** All Businesses in Montana.
- **Sample Frame:** InfoUSA database of businesses.
- **Sample:** All MT businesses found in the Sample Frame.
  
- Are there opportunities for Error and Bias?

# Example – Purchased Business Email Lists

- Are there opportunities for Error and Bias?
  - Coverage error: Only about 20% of businesses in the state have confirmed emails with InfoUSA.
    - Do those with email addresses differ from those without?
    - We were able to compare the location and industry make up and determine that no difference exists.



# Example – Purchased Business Email Lists

- Are there opportunities for Error and Bias?
  - Checking for nonresponse bias: Comparing the Population to the Sample.

Employee Size Range	Population Proportion	Sample Proportion
1 to 4	43.5%	42.9%
5 to 9	22.9%	25.9%
10 to 19	15.4%	16.8%
20 to 49	11.6%	9.5%
50 to 99	4.1%	2.9%
100 to 249	1.9%	1.5%
250 to 499	0.4%	0.2%
500 to 999	0.1%	0.2%
1,000 to 4,999	0.1%	0.0%

Metro Area	Population Proportion	Sample Proportion
Nonmetro	27%	28%
Billings	18%	15%
Missoula	15%	15%
Bozeman	13%	13%
Great Falls	7%	9%
Butte-Silver	3%	3%
Helena	8%	9%
Kalispell	9%	8%

# Example – Trail Usage

University of Montana

ScholarWorks at University of Montana

Institute for Tourism and Recreation Research  
Publications

Institute for Tourism and Recreation Research

2-2018

## Trail Usage and Value - A Helena, MT Case Study

Jeremy L. Sage

*University of Montana - Missoula*

Norma P. Nickerson

*University of Montana - Missoula*



Bike Helena

Sponsored · 🌐

👍 Like Page

Do you live in the Helena area? WE NEED YOUR HELP. The University of Montana/Institute for Tourism and Recreation Research is conducting a study to estimate the value Helena area residents and businesses place on our local recreation opportunities. A couple minutes of your time to complete this survey would be much appreciated.

[https://umt.co1.qualtrics.com/jfe/form/SV\\_4GRJB0gPa0tFDn](https://umt.co1.qualtrics.com/jfe/form/SV_4GRJB0gPa0tFDn)



[umt.co1.qualtrics.com](https://umt.co1.qualtrics.com)

UMT.CO1.QUALTRICS.COM

# Comparing Survey Modes

- **Intercept**
  - Helena area residents intercepted at area gas stations;
  - 325 completed surveys (93% response rate).
- **Social Media Push**
  - Survey available to anyone accessing Bike Helena, Visit Helena or Helena Area Chamber Facebook Sites;
  - 1,142 completed surveys (response rate?).

# Comparing Survey Modes – Opportunities to introduce error or bias?

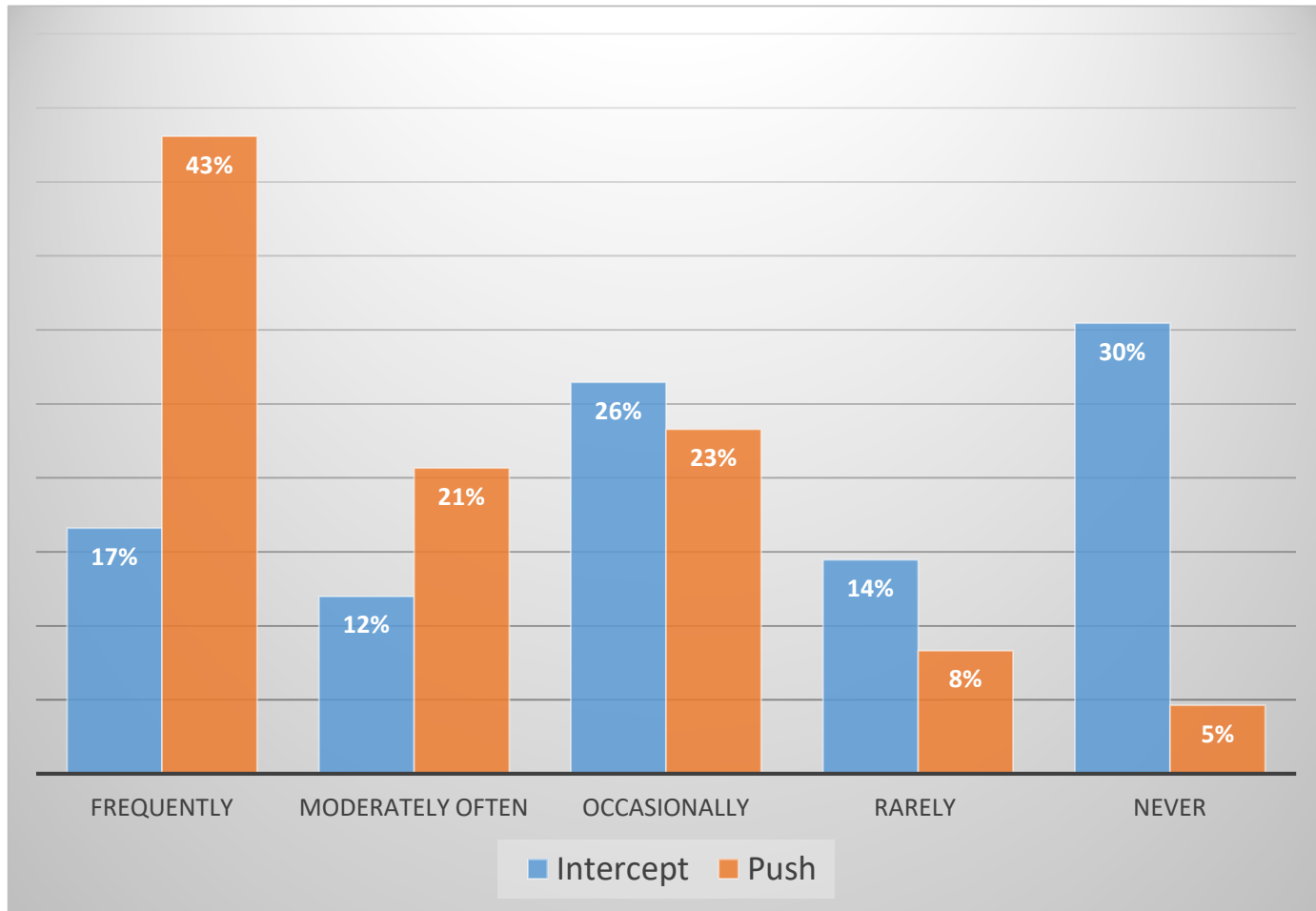
- **Intercept**

- Population was Helena area residents (Jefferson, Broadwater, and Lewis & Clark Counties);
- If residents don't routinely drive, then they may have been missed;
- If they don't use the four gas stations we were at, then they may have been missed.

- **Social Media Push**

- Same intended population;
- Over 12,000 views on Visit Helena and Bike Helena. 3.5% clicked on the survey. 72 shares;
- Who is missed?
- Who is most likely to engage?

# How often do you use the biking/hiking/walking trails or paths in the Helena area?



# Crafting Quality Questions

- Examples of Bad Questions:

Do you personally subscribe to, or regularly read, any periodicals, magazines, newsletters, etc. that are specifically related to travel?

- Yes
- No

Double Barreled Question.

# Crafting Quality Questions

- Examples of Fixing a Bad Question:

Do you personally subscribe to any periodicals, magazines, newsletters, etc. that are specifically related to travel?

- Yes
- No

Do you regularly read, any periodicals, magazines, newsletters, etc. that are specifically related to travel?

- Yes
- No

# Crafting Quality Questions

- Examples of Bad Questions: Political Questions



REPUBLICAN NATIONAL COMMITTEE | PRESIDENTIAL ADVISORY BOARD

## STATE OF THE NATION SURVEY

Do you agree that the baseless impeachment inquiry initiated against President Trump and his Administration by Nancy Pelosi, Adam Schiff, and House Democrats has been nothing more than a partisan witch-hunt to overturn an election and undercut Republican chances in 2020?

Yes

No

No opinion

Leading Questions



# Good Question Guidelines

- Ask one question at a time;
- Use simple and familiar words;
- Use specific and concrete words to specify the concept clearly;
- Use as few words as possible to pose the question;
- Use complete sentences;
- Make sure yes means yes and no means no.

# 2020 Research Summit

**Matthew Pettigrew**

Data Analyst and Research Associate



# Sampling Demo – Part 1

## Surveyor Training



Would you  
like to take  
a survey?

# Sampling Demo – Part 1

## Surveyor Training

- Research Question: What proportion of visitors to Montana are male?
- Sample Size Required: **EXACTLY** 10 non-resident visitors
- Check Back In!
  - ✓ What is the population of interest?
  - ✓ What survey question could we use?
  - ✓ Is our sample representative of the population?

# Sampling Demo – Part 1

## Surveyor Training

1. Flip a coin 10 times
  - a) Heads = Males
  - b) Tails = Females
2. Scan the QR code
3. Enter your LUCKY NUMBER (center of card) into first box
4. Enter number of heads in 10 flips into second box

HERE ARE YOUR SHINY PENNY AND  
LUCKY NUMBER!!

Please Wait For Further Instructions



Thank You For Making Today A Data Day!

- **Sampling Demo – Part 2**
  - Stay Tuned For Survey Results!
  - And Interactive Data Update!
  
- **Research Questions**
  - *What proportion of visitors to Montana are male?*
  - How does this differ from a survey question?

# What's a Research Question?

- Your research question is the primary question your project sets out to answer.
- It's the problem you're trying to solve.



# Why are research questions important?

- To set the scope of the problem or opportunity.
  - Stay on course!
  - Resourceful!
  - Actionable results!
- Tie your work to your business goals
  - Align research goals with business goals
  - Business clarity
  - Reduces risk



# How to define a research question?

## 1. Identify a broad question or business need

- Are people reading my travel magazine?
- Where do motorcyclists ride?
- How much bike traffic can the trails handle?
- I need some trucks!

# How to define a research question?

## 1. Identify a broad question or business need

- Who visits Montana?
- What are they doing here?
- Where do they stay?
- How much do they spend at diners?

# How to define a research question?

1. Identify a broad question or business need
  - a. End goal is to be more specific
2. Identify needs, resources, and factors
  - a. What are your business needs?
  - b. What information resources are available?
  - c. What factors or variables are important?

# How to define a research question?

## 2. Identify needs, resources, and factors

- Where do motorcyclists ride?
- How much bike traffic can the trails handle?
- I need some trucks!
- Who visits Montana?
- How much do they spend at diners?

# How to define a research question?

1. Identify a broad question or business need
2. Identify needs, resources, and factors
3. Re-evaluate (align) your research question
  - a. Get more specific – use factors/variables
  - b. Identify what the answer will look like
  - c. Narrow population or timeframe
  - d. Ensure business goals can be met - Actionable

# How to define a research question?

## 3. Re-evaluate (align) your research question

- Where do motorcyclists ride?
  - What routes through Missouri River Country are most preferred by motorcyclists during peak season?
- How much bike traffic can the trails handle?
  - What is the maximum number of cyclists Mt. Helena ridge trail before incurring increased erosion?
- I need some trucks!
  - Where can I find the best price for a small fleet of extended cab heavy duty trucks?

# How to define a research question?

1. Identify a broad question or business need
2. Identify needs, resources, and factors
3. Re-evaluate (align) your research question
4. “Conduct” your research
  - a. Self-Collect (low stakes)
  - b. Utilize available resources or research
  - c. Plan Your Study! (high stakes)

# 2020 Research Summit

## 5-year review of research reports

**Kara Grau**

Assistant Director of Economic Analysis





**ITRR provides citizens, leaders and policy makers with objective tourism and recreation research essential to making informed decisions for advancing Montana's economy while sustaining its natural resources.**



***Areas of Research***

Nonresident Travel (economic, visitation, characteristics, niches)

Resident Travel (economic, estimations, characteristics)

Resident Recreation (estimation, characteristics, activities)

Resident Attitudes (tourism, recreation, values, QOL)

Land Management visitation & characteristic studies

## Example Studies

## Results and Use

Nonresident survey	<ul style="list-style-type: none"><li>•economic impact/expenditures</li><li>•visitor characteristics</li><li>•travel patterns</li><li>•marketing</li></ul>
Resident surveys	<ul style="list-style-type: none"><li>•recreation types and use</li><li>•value of natural resources</li><li>•attitudes toward tourism</li></ul>
<b>Specialized studies</b>	
Outfitting and Guiding	<ul style="list-style-type: none"><li>•economic impact</li><li>•numbers of clients</li><li>•marketing</li></ul>
Motorcycle Tourism	<ul style="list-style-type: none"><li>•all about the journey (scenic routes)</li><li>•provide rider maps</li></ul>
Route Choices	<ul style="list-style-type: none"><li>•Nonresident arrivals to the state</li><li>•resident &amp; nonresident routes in MT</li></ul>

# ScholarWorks

- All reports published on our website:

<http://itrr.umt.edu/default.php>

# ScholarWorks

**Institute for Tourism & Recreation Research**

Home About ITRR Interactive Data **Publications & Reports** Survey Kit Contact Us

INSTITUTE FOR  
**TOURISM & RECREATION RESEARCH**

**Kayaking** in Glacier National Park

UM / [W.A. Franke College of Forestry & Conservation](#) / ITRR

The Institute for Tourism & Recreation Research conducts travel and recreation research in Montana, with a primary focus on the nonresident travel survey conducted throughout the state. ITRR is perhaps best known for producing the widely used statewide estimates of total nonresident visitation and travel expenditures, as well as visitor characteristics, in the state each year, along with the annual estimate of the economic contribution of nonresident travel to Montana's economy. [Read more about the nonresident travel survey and visitation and spending estimation models.](#)

Research Priorities

- Interactive Data
- Spending & Economics
- Publications**
- Most Recent

# ScholarWorks

## *Search Hints:*

ScholarWorks will open in a new browser window. You can enter search terms to find what you are looking for in the upper lefthand side of the screen, or click "Advanced Search" to enter more specific search terms and parameters such as which fields should be searched for the terms you enter (e.g., subject, author, title).

Once you have conducted a search, you may view the search terms you entered, or enter new search terms, by clicking the "Show Search" tab near the upper right corner of the page to open the search options again.

- **Quotation marks** " around terms return exact phrase matches. Example: "cooler water" will return different results from "water cooler."
- **Asterisks** \* within or at the end of a term function like multiple wildcards. Example: an All Fields search for l\*nn will return results with lynn, linn, and lochlann.
- **Questions marks** ? within or at the end of a term function like single wildcards. Example: an All Fields search for l?nn will return results with lynn and linn, not lochlann.
- **Tildes** ~ at the end of a term return fuzzy matches. Example: colour~ will return results with colour, color, and coli.
- **Commas** , will be ignored in any search. Instead, use the tips above to construct finely tuned queries, and then save your criteria using the "Save this search" feature.

ITRR publications are considered a series within the ScholarWorks repository.

## Search

Enter search terms:

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## INSTITUTE FOR TOURISM AND RECREATION RESEARCH PUBLICATIONS

The Institute for Tourism & Recreation Research at the University of Montana conducts travel and recreation research in Montana, with a primary focus on the nonresident travel survey conducted throughout the state. The Institute produces widely used statewide estimates of total nonresident visitation and travel expenditures, visitor characteristics in the state each year, and annual estimate of the economic contribution of nonresident travel to Montana's economy. The research and creative scholarship by the faculty of the Institute for Tourism & Recreation Research includes studies into the social and environmental impacts of tourism; regional and community tourism planning and development; niche market studies; geotourism; and outdoor recreation.

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Jump to:

2019 ▾

### Submissions from 2019

[PDF](#) [Tourism & Its Impacts on Rural Communities: Deer Lodge 2018](#), Carter Bermingham, Norma P. Nickerson, and Megan Schultz

[PDF](#) [Tourism & Its Impacts on Rural Communities: Lima, Montana 2018](#), Carter Bermingham, Norma P. Nickerson, and Megan Schultz

# Report content

- Repeat Visitors - Assessing Motivations for Return Visits and the Influence of Previous Visits to Montana
  - Abstract
  - Executive Summary – brief, stand-alone summary
  - In-depth description of Methods, Analysis, Results, Conclusion and Recommendations, Appendices

# Research report examples:

- **Motorcycle Touring in Montana: A Market Analysis**
- **Analysis of Touring Cyclists: Impacts, Needs and Opportunities for Montana**
- **Trail Usage and Value - A Helena, MT Case Study**



- Research is not just for marketing!
- Business plans, grant writing, community development, etc.
- Please help your partners find information they need by sending them our way!

# 5-Year Summary of Reports

- Annual Reports:
  - Statewide Estimates of Nonresident Visitation, Expenditures, and Economic Impact
  - County & Region Nonresident Expenditures and Economic Impact
  - Tourism Outlook

# Residents

2014	Comparative Analysis of Resident and Visitor Community Image: Gardiner, Montana
2014	Resident visitation at NPS sites: Yellowstone, Glacier, and Little Bighorn Battlefield
2015	Montana Residents and Tourism
2015	Relocation to Montana: Current Residents Who Were Influenced by Previous Vacations or Seasonal Tourism Jobs to Move to the State
2015	The Montana Expression 2015: Bicycling
2017	Invasive species and water recreation
2018	The Montana Expression 2018: MT Residents' Use of Fishing Access Sites & Public Lands & Waterways Values
2018	The Montana Expression 2018: Aquatic Invasive Species and Water Recreation
2018	Resident Travel in Montana
2018	A Longitudinal Study of Montanans' Intrastate Travel
2018	The Montana Expression 2018: MT Resident use of state parks
2018	Gardiner, Montana: Resident perceptions Before and After Development
2019	Montana Travel and recreation - Memorial Day & July 4th Holidays
2019	Montanans' Consumer Confidence: Expectations for Income, Travel, and Recreation
2020	The Montana Expression: Resident Attitudes Towards Tourism Q4 2019

# Tribal Tourism

<b>2019</b>	<b>Blackfeet Tribal Tourism Case Study</b>
<b>2019</b>	<b>Blackfeet Conservation Area Development</b>
<b>2019</b>	<b>Indian Country Cultural and Heritage Tourism</b>

# Public Lands

<b>2014</b>	<b>Visitor Support of Yellowstone National Park</b>
<b>2014</b>	<b>Gardiner, Montana: Visitor perceptions, Image, &amp; Spending 2013</b>
<b>2016</b>	<b>Comparing Bicyclists, Non-Bicyclists, and Bus Drivers in Glacier National Park</b>
<b>2016</b>	<b>Assessing Going-to-the-Sun Road Travelers' Attitudes, Knowledge, and Perceptions of Bicycling</b>
<b>2016</b>	<b>Understanding park support - Philanthropy and other support for YNP</b>
<b>2016</b>	<b>Building constituency at Yellowstone National Park: 2015 Visitor Study</b>
<b>2016</b>	<b>What we know about Crowding and Visitor Experiences: White Paper</b>
<b>2016</b>	<b>Economic Contributions of the Yellowstone River to Park County, Montana</b>
<b>2017</b>	<b>Thinking Outside the Park- National Park Fee Increases Effects on Gateway Communities</b>
<b>2018</b>	<b>Gardiner, Montana: Visitor Perceptions, Image and Spending 2018</b>

# Recreation & Activities

2015	Non-Resident Activity Trends: 2001-2014
2017	Focus on Activities: Montana's key Niche Activities
2018	Montana's outfitting industry: 2017 Economic contribution and industry-client analysis
2018	Trail Usage and Value: A Helena, MT Case Study
2019	Economics and Characteristics of Alpine Skiing
2019	Motorcycle touring in Montana: A market analysis

# Travel Planning & Characteristics

2014	Comparison of MT Visitor's and MT Resident's Use of Downtowns: Presentation Report
2015	Revisiting market segments based on "what attracted visitors to Montana"
2015	Canadian Travelers in Montana: Traveler Profiles by Purpose of Trip to the State
2016	Assessing character of place to guide geotourism: A case study of two Montana communities
2016	The Montana Expression 2016: Vacation Planning
2016	Park County, WY Visitor Profile - 2016 to 2005 Comparison
2017	Age defining life stage traveling: Montana nonresident travel groups
2017	Visitor Characteristics and Economic Analysis of Northeast Montana
2019	Repeat Visitors: Assessing Motivations for Return Visits and the Influence of Previous Visits to Montana

# Travel Spending & Economics

<b>2016</b>	<b>The importance of Traveler spending on locally produced goods and services</b>
<b>2016</b>	<b>MT Expression Research Report: A Comparison of Vacationer Spending Segments</b>
<b>2016</b>	<b>An Assessment of the Resort Tax: Collections and Usage in Montana Communities</b>
<b>2016</b>	<b>Using DMAs as a Marketing tool: 2015 nonresident visitor data</b>
<b>2017</b>	<b>Analyzing Economic and Social Opportunities and Challenges Related to Bison Conservation in Northeast Montana</b>
<b>2017</b>	<b>2017's Costly Fire Season</b>
<b>2020</b>	<b>Canadian Travelers</b>



2014	2014 Spartan race survey Kit Visitor Study	2017	2016 Montana Folk Festival
2014	Survey Kit Recap	2017	Pond Hockey Classic 2017 Survey Kit Report
2014	Whitefish Legacy Trail Visitor Study	2017	Spartan Race 2017 Survey Kit Report
2014	Montana State High School Rodeo Finals: 2014	2017	Montana Folk Festival 2017 Survey Kit Report
2014	Sanders County Yard Sale: 2014	2018	The western art show week
2014	Montana Folk Festival: 2014	2018	Spartan Race 2018 Survey Kit Report
2014	Evel Knievel Days: 2014	2018	Garden City Brewfest 2018 Survey Kit
2014	Mountain Madness Airshow: 2014	2018	Out To Lunch 2018 Downtown Missoula Partnership Survey Kit
2014	An Ri Ra Montana Irish Festival: 2014	2018	Downtown ToNight 2018 Downtown Missoula Partnership Survey Kit
2014	Dragon Boat Festival: 2014	2018	River City Roots Fest 2018 Survey Kit
2015	Pond Hockey Classic 2015 Survey Kit Report	2018	Montana Dragon Boat Festival 2018 Survey Kit report
2015	Spartan Race 2015 Survey Kit Report	2018	Montana Folk Festival 2018 Survey Kit Report
2015	Montana State High School Rodeo Finals: 2015	2018	Blackfoot Pathways Sculpture in the Wild Survey Kit Report
2015	The Event at Rebecca Farm	2018	Tourism & its impacts on rural communities: Lima 2018
2015	Montana Dragon Boat Festival 2015	2019	Tourism & its impacts on rural communities: Thompson Falls 2018
2015	Montana Cowboy Poetry Gathering and Western Music Rendezvous- 2015	2019	Tourism & its impacts on rural communities: Deer Lodge 2018
2015	Montana Folk Festival: 2015	2019	Tourism & its impacts on rural communities: Shelby 2018
2016	Spartan Race 2016 Survey Kit Report	2019	Tourism & its impacts on rural communities: White Sulphur Springs 2018
2016	Montana Winter Fair- 2016 (Lewistown, MT)	2019	2019 Montana Spartan Race Survey Kit
2016	Big Sky Documentary Film Festival 2016	2019	Montana Folk Festival Report 2019
2016	The Event at Rebecca Farm 2016 survey kit	2019	2019 Whitefish Farmers Market Survey Kit
2016	Montana Dragon Boat Festival 2016	2020	Tourism & its impacts on rural communities: Bigfork 2019

# 2020 Research Summit

## Quarterly Nonresident Travel

**Megan Schultz**

Project Manager & Research Associate



# Quarterly Nonresident Travel Data



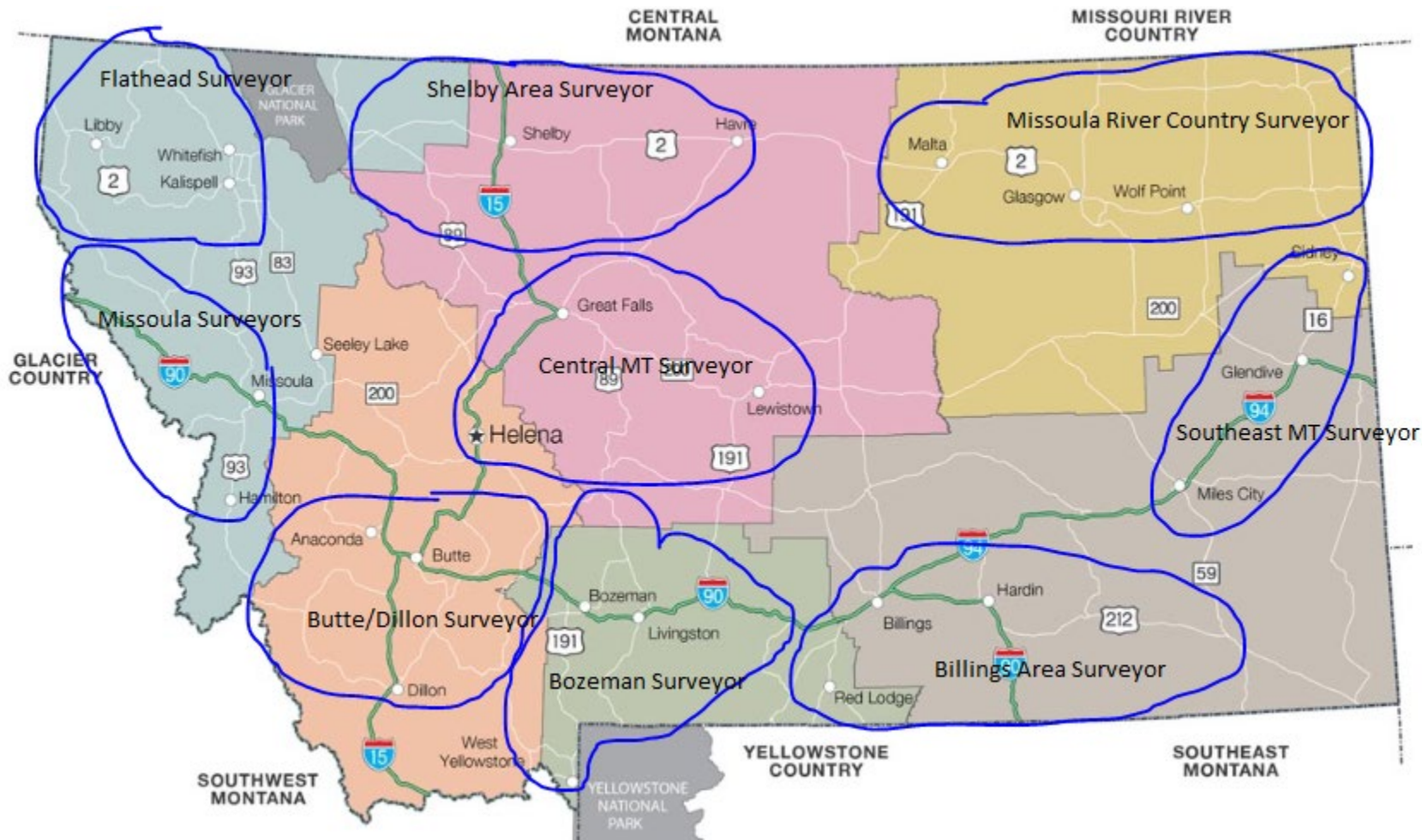
## Data



# Scientific Approach to Data Collection

- Each Intercept:
  - Up-front survey on the iPad
  - Mailback survey
- Understanding the Total Population of Visitors to Montana
  - 11 Surveyors covering 9 Territories
  - Each working 29 hours per week\*

# Data Collection Territories



# Scientific Approach to Data Collection

- Representative Sampling
- Surveying and Proportion Counts
  - Unbiased locations
    - Gas stations, rest areas, airports
  - Variation in the days and times worked allows for representative data collection
- Understanding travel groups
  - Each vehicle
    - Because of doing those proportion counts
    - Reporting: Average Daily Group Expenditures

# Proportion Count Sampling

Bozeman January-June 2020	S	M	T	W	R	F	S
Airport	X X	X XX X	X XX X	X XX X	XX XX X	X X	X X
West Yellowstone Exit	X	X	X	X	X	X X	X
Gardiner Exit		X		X	X	X X	X
Highways 87 & 20	X	X X	X	XX X	X XX	X XX X	X

# Framing Questions

- Surveys written to ask about different time frames
  - Yesterday versus the last 24 hours
- Training for question asking
  - Need the same response whether the interview is taking place in Libby or Sidney





# Quarterly Nonresident Data

- **Cleaning/Coding of Spending Data**
  - Cleaned to deal with outliers, recategorize if needed
  - Weighted to ensure sample is representative of population
  - Delimited – 3 standard deviations + mean
  - Average spending for each category

# Getting the Big \$

avg. daily group expenditure

*(from survey data)*

X

avg. length of stay

*(from survey data)*

X

total # of groups

*(from the visitation model)*

=

estimate of total  
nonresident travel  
spending in the state

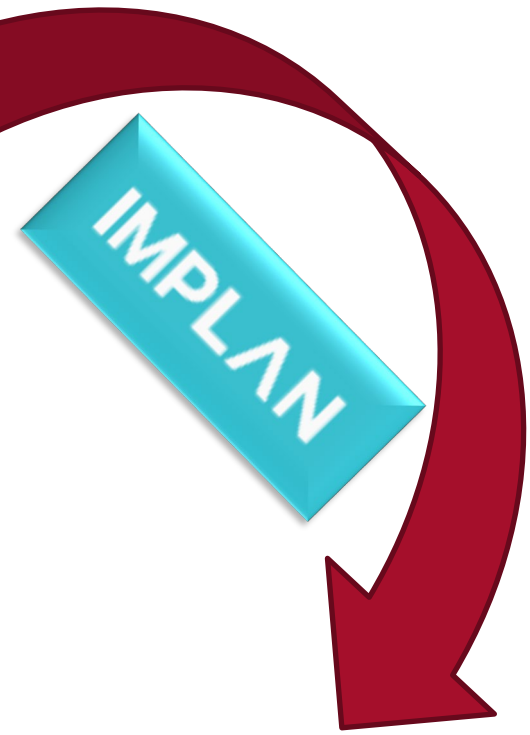
**Table 1 - 2018 Nonresident Traveler Expenditures<sup>1</sup>**

Expenditure Category	Average Daily Per Group <sup>2,3</sup>	Allocation by Category	Total Expenditures <sup>2,4</sup>
Gasoline, Diesel	\$33.12	23%	\$839,690,000
Restaurant, Bar	\$26.54	18%	\$668,150,000
Hotel, Motel	\$17.87	12%	\$449,710,000
Outfitter, Guide	\$16.52	11%	\$410,110,000
Retail Sales	\$13.63	9%	\$344,570,000
Groceries, Snacks	\$10.95	7%	\$275,380,000
Licenses, Entrance Fees	\$10.28	7%	\$252,130,000
Auto Rental	\$5.89	4%	\$147,730,000
Rental Home, Cabin	\$4.64	3%	\$115,490,000
Made in MT	\$3.79	3%	\$94,310,000
Campground, RV Park	\$1.80	1%	\$45,210,000
Vehicle Repairs	\$1.44	1%	\$36,330,000
Misc. Services	\$1.00	1%	\$24,550,000
Gambling	\$0.54	<1%	\$14,060,000
Farmers Market	\$0.27	<1%	\$6,450,000
Transportation Fares	\$0.03	<1%	\$690,000
<b>Estimated Total</b>	<b>\$148.30</b>		<b>\$3,724,550,000</b>

Spending is not the end of the story. These dollars spent flow through the State's economy.

**Table 1 - 2018 Nonresident Traveler Expenditures<sup>1</sup>**

Expenditure Category	Average Daily Per Group <sup>2,3</sup>	Allocation by Category	Total Expenditures <sup>2,4</sup>
Gasoline, Diesel	\$33.12	23%	\$839,690,000
Restaurant, Bar	\$26.54	18%	\$668,150,000
Hotel, Motel	\$17.87	12%	\$449,710,000
Outfitter, Guide	\$16.52	11%	\$410,110,000
Retail Sales	\$13.63	9%	\$344,570,000
Groceries, Snacks	\$10.95	7%	\$275,380,000
Licenses, Entrance Fees	\$10.28	7%	\$252,130,000
Auto Rental	\$5.89	4%	\$147,730,000
Rental Home, Cabin	\$4.64	3%	\$115,490,000
Made in MT	\$3.79	3%	\$94,310,000
Campground, RV Park	\$1.80	1%	\$45,210,000
Vehicle Repairs	\$1.44	1%	\$36,330,000
Misc. Services	\$1.00	1%	\$24,550,000
Gambling	\$0.54	<1%	\$14,060,000
Farmers Market	\$0.27	<1%	\$6,450,000
Transportation Fares	\$0.03	<1%	\$690,000
<b>Estimated Total</b>	<b>\$148.30</b>		<b>\$3,724,550,000</b>



2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$3,157,010,000	\$1,029,360,000	\$1,098,180,000	\$5,284,550,000
Employment (# of jobs)	43,090	7,190	9,050	59,330
Employee Compensation	\$985,320,000	\$227,110,000	\$292,930,000	\$1,505,360,000
Proprietor Income	\$141,970,000	\$60,480,000	\$47,660,000	\$250,110,000
Other Property Type Income	\$396,700,000	\$192,060,000	\$200,570,000	\$789,330,000
State & Local Taxes				\$230,020,000

# Survey Kits

**Whitefish Farmers Market**

Q1. Are you a resident of Montana?  Yes  No (Skip to Q4.)

Q2. Are you attending this event with out of area visitors?  Yes  No

Q3. Is your primary residence in Whitefish?  
 Yes (Skip to Q14. on back)  No (go to Q3a.)  
 Q3a. Zip code (then go to Q5.)

Q4. In what state, province, or foreign country do you reside?

Q5. Is this your first time visiting Whitefish?  Yes  No

Q6. Was attending this event your primary reason for being in Whitefish?  Yes  No

Q7. For what other reasons are you visiting Whitefish? (Check all that apply.)  
 Vacation/recreation/pleasure  Just passing through  Business/convention/meeting  
 Visiting friends/relatives  Shopping

Q8. On this trip, how many nights will you spend away from home?  
 0 (Skip to Q11.)  1  2  3  4  5  6  7  8  9  10 or more

Q9. How many of those nights are in Montana?  
 0  1  2  3  4  5  6  7  8  9  10 or more

Q10. Of your nights in Montana, how many will you stay in Whitefish?  
 0  1  2  3  4  5  6  7  8  9  10 or more

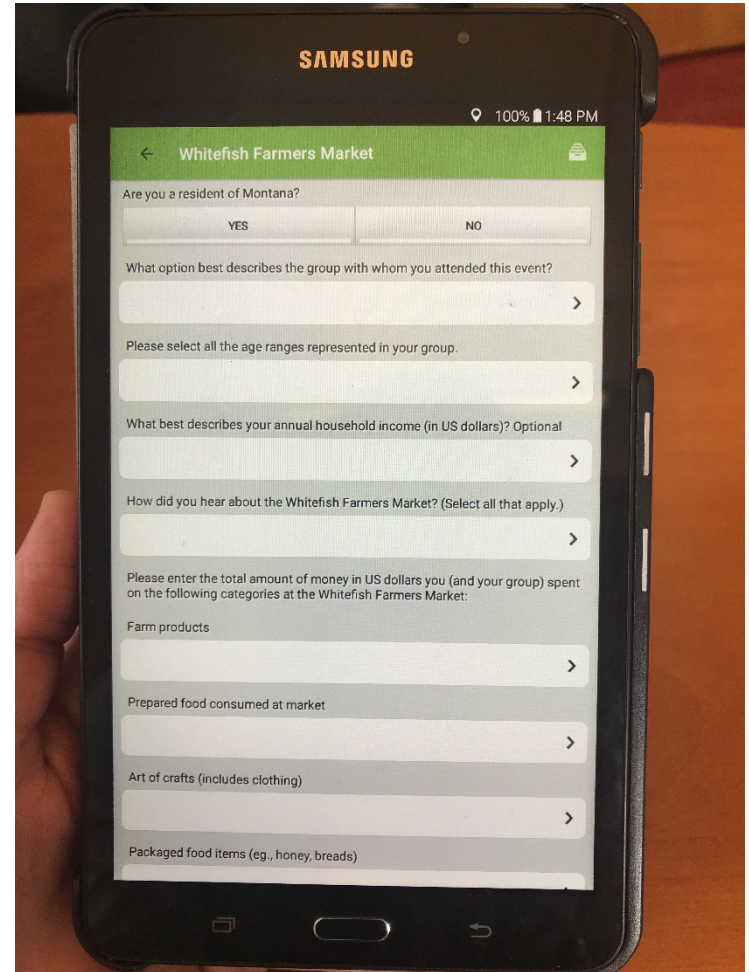
Q11. In what type of accommodation(s) will you stay in Whitefish? (Check all that apply.)  
 Hotel/motel/bed & breakfast  Public land camping  Second home/cabin/condo  
 Rental cabin/home/condo (includes Airbnb, VRBO)  Private campground  Resort  
 Home of friend/relative  Guest ranch

Q12. Please enter your best estimate of the TOTAL amount of money in US dollars you (and your family/travel group, if applicable) will spend in WHITEFISH in each of the following categories. If you will not spend money in a category, please leave it blank.

<b>ACCOMMODATIONS in Whitefish</b>	<b>TRANSPORTATION in Whitefish</b>
Hotel/motel/bed & breakfast \$ <input type="text"/>	Gasoline/diesel \$ <input type="text"/>
Campground \$ <input type="text"/>	Local transportation \$ <input type="text"/>
Rental home/cabin/condo \$ <input type="text"/>	Auto rental \$ <input type="text"/>
<b>FOOD in Whitefish</b>	<b>RETAIL/SERVICES in Whitefish</b>
Restaurant/bar \$ <input type="text"/>	Retail goods/services \$ <input type="text"/>
Groceries/snacks \$ <input type="text"/>	Entertainment/recreation \$ <input type="text"/>

Q13. How many people does the above spending represent (including yourself, i.e., your travel group/family size)?  
 1  2  3  4  5  6  7  8  9  10  more than 10

Continue on back...



# Survey Kit Overview

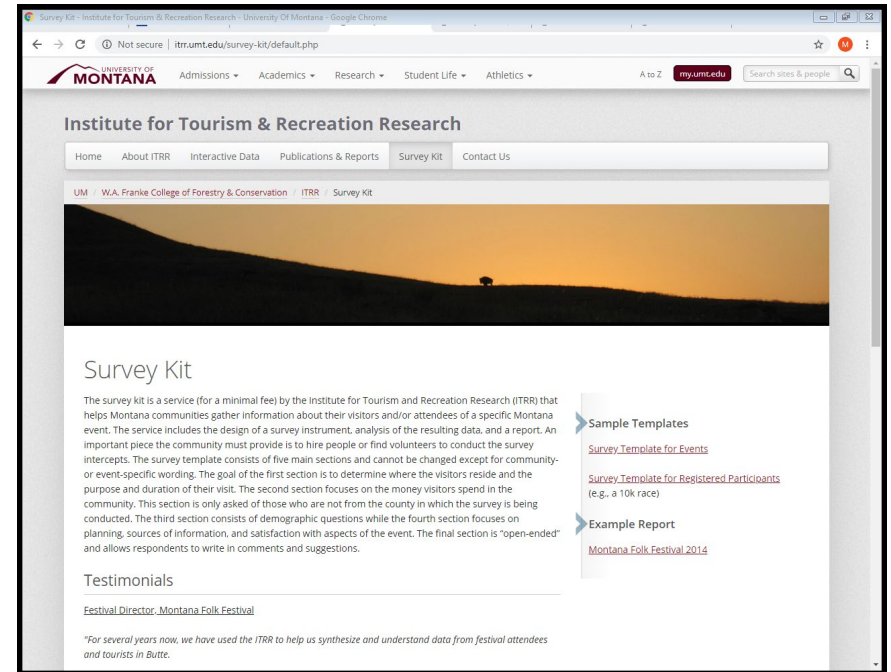
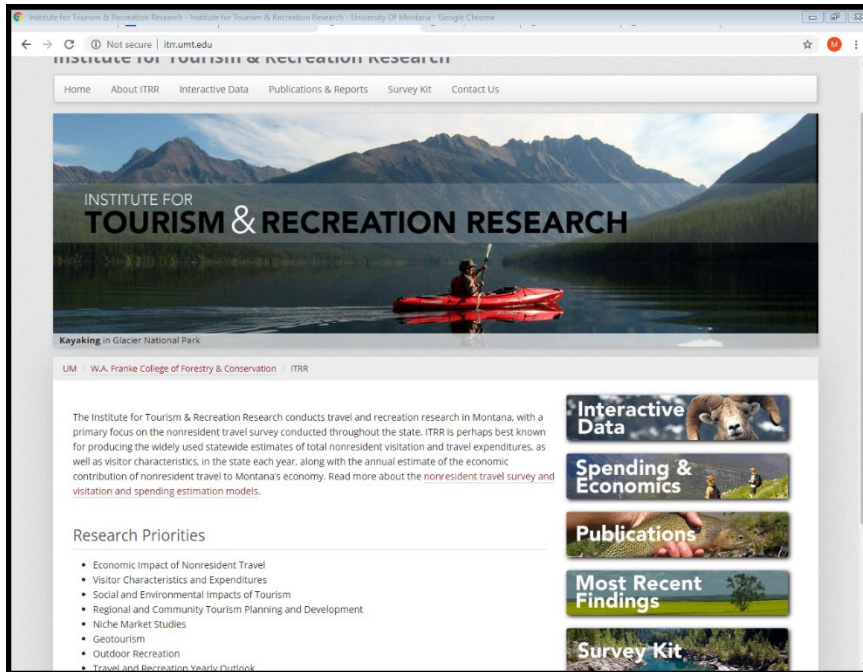
- Service for a minimal fee
  - \$500 to \$800
    - Depends on method used
- Includes:
  - Survey design (based off template)
  - Guidance on collecting the data
  - Data entry and analysis
  - Report on the results
    - Including open-ended comments in an appendix



# Survey Kit Examples

- Montana Folk Festival
- Montana Dragon Boat Festival
- Missoula Downtown Association
  - Downtown ToNight, Out to Lunch, River City Roots, Brewfest
- Shelby, Lima, Deer Lodge Communities
- Blackfoot Pathways: Sculpture in the Wild
- Butte Community Ice Center

# Survey Kit Info on our Website



Contact Megan Schultz at:  
[megan.schultz@umontana.edu](mailto:megan.schultz@umontana.edu)

# Survey Kit Uses

- Potential for smaller areas to do data collection and help with marketing plans and applying for grants
- Buying this information from consultants \$\$\$

