

A person wearing a red helmet and dark clothing is riding a mountain bike on a dirt trail through a dense forest. The sun is shining brightly from behind the trees in the center, creating a strong lens flare and illuminating the path. The forest is filled with tall, thin trees and lush green foliage.

Future Partners

**Visit Bozeman
Regional Sentiment Study**

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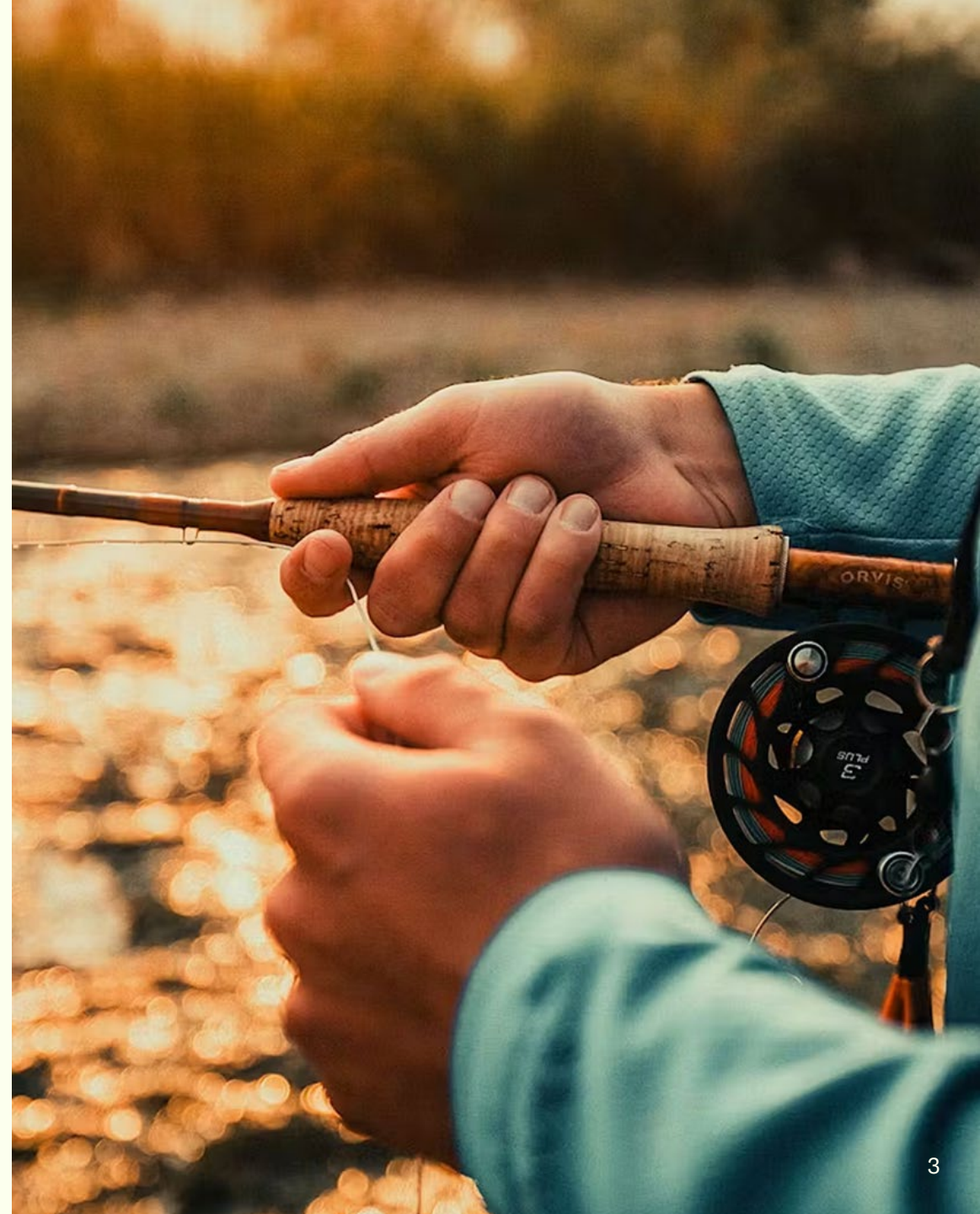


Research Overview & Objectives

This report presents findings from a study of regional residents' perceptions of Bozeman as a leisure destination, conducted by Future Partners on behalf of Visit Bozeman. This presents data collected using an online survey of regional travelers.

The goal of the overall research was to:

- Understand the regional sentiment of Bozeman as a travel destination
- Identify the experiences regional residents are seeking in Bozeman, to guide investment and development planning
- Identify strategies to increase engagement, support, tourism growth and spend, and community sentiment
- Understand perceptions and usage of Bozeman facilities and attractions



Methodology

To address the objectives of this research, Future Partners implemented an online survey of regional residents distributed to respondents sourced from a trusted panel provider and Visit Bozeman's owned audience. This report presents data from 534 completed surveys was gathered from mid-July through the end of August 2024.

Respondents met the following criteria:

- Age 18 years or older
- Must live outside Bozeman
- Must have taken an overnight trip in the past 12 months

These respondents had to also be residents of the following regional markets:

- Montana (excluding Bozeman): n=234
- Idaho (select counties, see the following page): n=100
- Wyoming: n=100
- Eastern Washington (select counties, see the following page): n=100



Methodology (continued)

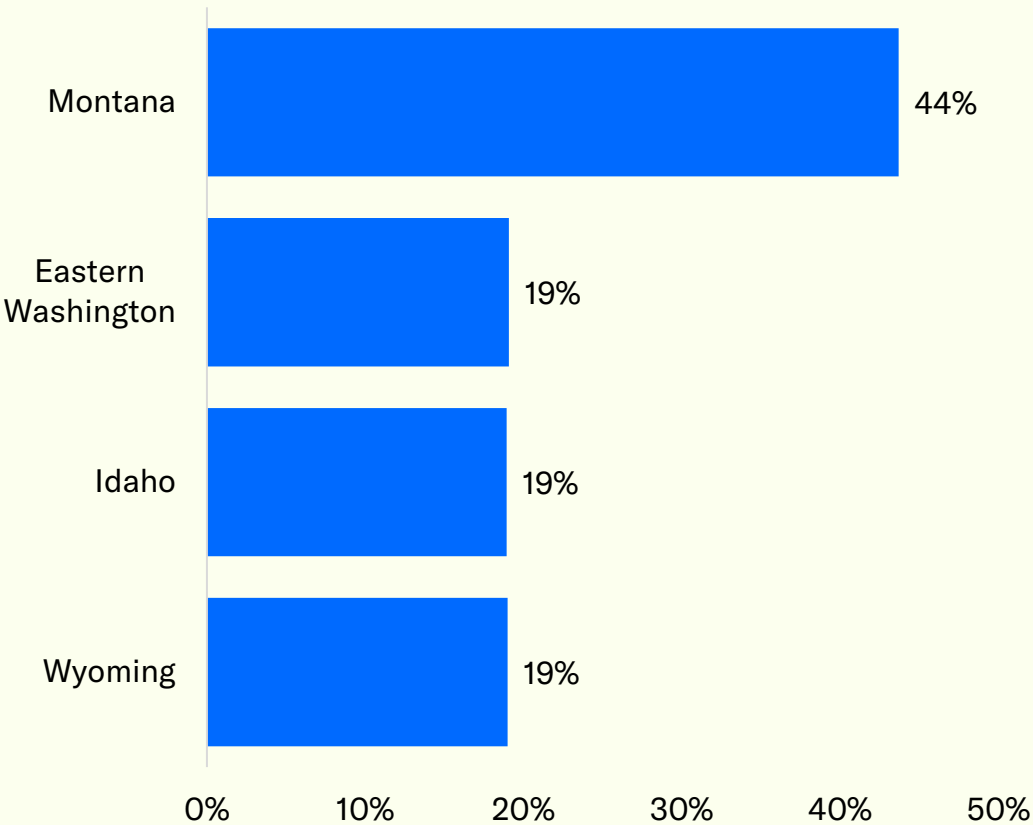
Eastern Washington Counties	Idaho Counties
Adams Asotin Columbia Ferry Franklin Garfield Lincoln Pend Oreille Spokane Stevens Walla Walla Whitman	Bannock Bear Lake Benewah Bingham Bonner Bonneville Boundary Caribou Clark Clearwater Franklin Fremont Jefferson Kootenai Latah Madison Shoshone Teton



Distribution of Sample by State of Residence

Montana residents comprise the largest share of respondents to the survey at 44 percent, followed by relatively similar shares of responses from Eastern Washington (19%), Idaho (19%), and Wyoming (18%) residents. *Note that here and throughout the report percentages may not sum to 100 percent due to rounding.*

State of Residence



State of Residence by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Montana	44%	58%	36%	7%	100%
Eastern Washington	19%	13%	23%	34%	0%
Idaho	19%	14%	24%	27%	0%
Wyoming	19%	15%	17%	32%	0%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

Question: In which state do you currently live?

Base: Total respondents.

Key Terms in This Report

- **Recent Visitors** – respondents whose most recent visit to Bozeman occurred in 2020 or later.
- **Lapsed Visitors** - respondents whose last visit to Bozeman was in 2019 or earlier.
- **Never Been** – respondents who have never visited Bozeman.
- **Montana Residents** – respondents who live in Montana, excluding any residents of Bozeman.
- **Idaho Residents** – respondents who live in selected counties of Idaho
- **Wyoming Residents** – respondents who live in the state of Wyoming
- **Eastern Washington Residents** – respondents who live in selected counties of Eastern Washington



Executive Summary

Bozeman Perceptions

1. Regional residents overall feel positively about Bozeman as a place to visit, though Montanans are more lukewarm.

Overall, three-fourths (75%) of regional residents feel positive or very positive about Bozeman as a place to visit. Recent visitors (27%) were much more likely than lapsed visitors (14%) or those who have never been (8%) to say that they feel very positive about Bozeman. Reflecting the general trend throughout this study, those who have never been were much more likely to be neutral (36%). Notably, Montanans (12%) are more likely than overall regional residents (7%) to say they feel negative or very negative about Bozeman.

2. Most recent visitors and Montanans feel Bozeman is losing its “Montana authenticity”. Agreement over the nickname “Boze Angeles” echoes perceptions around Bozeman’s loss of Montana authenticity.

Over four in ten (42%) regional residents agree that Bozeman’s “Montana authenticity” is being lost. This sentiment is strongest among Montanans (64%) and recent visitors (52%), while the majority of those who have never been are neutral (68%). Similarly, four in ten (40%) regional residents also agree that “Boze Angeles” is an apt nickname for Bozeman. Again, the majority of recent visitors (53%) and Montanans (53%) agreed, while those who have never been are most inclined to be neutral (60%). Lapsed visitors (33%) are much more likely to disagree or strongly disagree about the monicker compared to total respondents (23%). It should be noted that, despite this perception around Montana authenticity, regional residents nevertheless still hold a positive view of Bozeman as a place to visit.

3. Six in ten regional residents feel too many outsiders are moving to Bozeman.

Nearly two-thirds (62%) of regional residents agreeing that too many people are moving there from outside of the region. Following the established trends seen in the key segments, a large majority of Montanans (81%) and recent visitors (70%) agree with this sentiment, while those who have never been are more likely to be neutral (50%). These agreement levels around Bozeman’s population shifts are higher than those around perceived changes to the city’s culture, indicating that while there is a perception of more outsiders coming into the area, this does not necessarily mean residents feel transplants are impacting the culture of Bozeman.

4. Views of Bozeman as being too expensive correlates to perceptions that it is mostly a destination for the wealthy. Only one in four Montanans agree that Bozeman is a good value destination for visitors.

More than half (55%) of regional residents agree that Bozeman is mostly a destination for “rich people”, with Montanans (77%) and recent visitors (62%) once again most likely to agree. These are also the two segments that were most likely to cite the expensiveness of Bozeman as the first negative thing about Bozeman that comes to mind. Reiterating this perception, only four in ten (40%) feel that visitors to Bozeman can have a travel experience that is good value for money. In particular, only 25 percent of Montanans agree. These in-state residents are also significantly more likely to disagree or strongly disagree (39%) compared to total respondents (23%).

Perceptions of Bozeman’s Event Facilities & Offerings

1. Most regional residents agree that Bozeman should invest more in better facilities for the community and visitors.

52 percent or strongly agree with this, signaling a perception that the city needs an upgrade to its facilities for the benefit of Bozeman residents as well as visitors. Notably, agreement levels were highest among recent visitors (60%), followed by Montanans (57%). The majority of those who have never been (62%) were neutral. Disagreement is low amongst all key audiences.

2. The likelihood to recommend Bozeman for sporting events is low across all segments.

One-third of regional residents would recommend Bozeman as a place to visit for a sporting event (32% selected an 8 or higher on a 0- to 10-point scale). Subtracting the detractors (those who selected a 6 or lower) from the promoters (those who selected a 9 or 10), the likelihood to recommend score for Bozeman to visit for a sporting event is -34 for total respondents (with the lowest potential score being -100 and the highest 100). The scores are negative across key segments, with those who have never been (-69) and lapsed visitors (-29) scoring lowest. Lack of interest in sports or not knowing what Bozeman offers are the top reasons residents are unlikely to recommend the city for sporting events. Over one in five said they are not interested in sports (22%), while a similar share said they are unfamiliar with Bozeman’s sports offerings. The lack of options (11%) and/or professional teams (11%) were also cited relatively frequently.

3. The likelihood to recommend Bozeman for special events is slightly higher than sporting events, but marginally.

Four in ten regional residents would recommend Bozeman as a place to visit for a special event (39% selected an 8 or higher on a 0- to 10-point scale). Subtracting the detractors (those who selected a 6 or lower) from the promoters (those who selected a 9 or 10), the likelihood to recommend score for Bozeman to visit for a special event is -29 for total respondents. The scores are negative across key segments, recent visitors score highest (-9), while those who have never been (-60), followed distantly by Montanans (-20) score lowest. Bozeman being too remote (18%) is the most-cited reason regional residents would not recommend it for special events, followed by a lack of familiarity with what events are available (17%) and the expensive of visiting Bozeman (17%). Notably, one in three Montanans who are unlikely recommend Bozeman for special events (34%) mentioned the expensiveness, which is the top write-in response for that segment.

4. Bozeman scores lowest for likelihood to recommend for a business meeting event.

Over one in four regional residents would recommend Bozeman as a place to visit for a business meeting or event (28% selected an 8 or higher on a 0- to 10-point scale). Subtracting the detractors (those who selected a 6 or lower) from the promoters (those who selected a 9 or 10), the likelihood to recommend score for Bozeman to visit for a business meeting or event is -42 for total respondents. The scores are negative across key segments, recent visitors score highest (-32), while those who have never been (-66), followed distantly by Montanans (-45) score lowest. The main reason cited for why regional residents would not recommend Bozeman for a business meeting or event is that such an event does not apply to them personally (27%). This is followed by lack of familiarity with Bozeman’s offerings for business meetings and events (15%) and difficulty with accessing Bozeman for such an event (12%).

Potential Visitation to Bozeman

1. Likelihood to visit Bozeman in the next two years is strong at over two-thirds of overall regional residents.

Recent visitors (79%) have the highest likelihood, indicating a strong desire for repeat visitation especially among anyone who visited Bozeman in 2020 or later. Proximity is also a big driver for likelihood of near-term visitation, with nearly three-fourths of Montanans (72%) saying they will visit in the next two years. On the other hand, over one in five of those who have never been (22%) say they are somewhat or very unlikely to visit Bozeman in the near-term.

2. The access to warm-weather outdoor recreation and Yellowstone that Bozeman offers is a key draw for likely visitors.

For those likely to visit Bozeman in the next two years, the top reasons center around outdoor summer recreation (44%) and proximity to Yellowstone (37%). Notably, those who have never been but are likely to visit are significantly more likely to select outdoor summer recreation (74%), as well as overall affordability (33%). Shopping is a notably higher draw for recent visitors (31%), while Montanans are more likely to select dining options (30%) as their reason for visiting Bozeman again.

3. June through September are the likeliest months of visitation to Bozeman across all segments.

Grouping the months of likely visitation to Bozeman by season, summer (68%) is the most popular followed by fall (56%). In particular, Montanans are significantly more likely to say they would visit in the fall months of September-October (67%). Winter (27%) has the lowest share of overall likely regional visitors who say they are likely to visit (27%), though Montanans (40%) and recent visitors (35%) are significantly more likely. Similarly for the spring months, one-third (37%) are likely to visit, but this is much higher among Montanans (48%) and recent visitors (43%).

4. Highlighting unique things to do that offer good value or appeal to families could help with conversion.

For regional residents who have never been to Bozeman before, more than one in ten (12%) say they are already considering a visit to Bozeman. However, finances (9%), knowing what there is to do (9%), and a good deal/discount (9%) were the next most-cited ideas for what would convince these residents to consider visiting the destination. Providing unique activities, particularly that demonstrate good value or are good for families, could be an effective way to convert these residents.

Recent Visitors to Bozeman

1. Recent regional travel to Bozeman is largely for leisure or personal reasons.

Among visitors whose last trip to Bozeman was in 2020 or later, most say their most recent trip was for leisure, with 44 percent of overall recent visitors saying they traveled for either a vacation (23%) or a weekend getaway (21%). A similar share say they traveled for other personal reasons (42%), with only 6 percent saying they came for business, a MICE event, or government travel. For Montanan recent visitors, they are more likely to say they traveled to Bozeman for other personal reasons (51%), but less likely to say that they traveled to Bozeman for a vacation (10%).

2. One in four recent visitors say a special event and/or shopping were important factors when deciding to visit Bozeman.

Looking at other trip drivers that factored into recent visitors' decision to travel to Bozeman on this latest trip, at one in three (32%) the largest share say visiting friends or relatives (32%) was an important factor. However, one in four say a special event/festival (25%) and/or shopping (25%) were important, suggesting these offerings are a key draw for regional visitors. Interestingly, while one in four say shopping was an important factor in why they traveled to Bozeman, a much larger share (46%) actually engaged in shopping on their latest trip to Bozeman, the most-participated in activity for recent visitors. Conversely, while one in four also say a special event or festival was important, only about one in ten (11%) participated in a festival or event. Despite lower in-market participation, the high share of those who rank festivals/events as important indicates it still plays a role in the dreaming/planning stages of their trip to Bozeman.

3. Overall trip satisfaction is high, but accommodation costs and overall affordability rank low.

The majority of recent visitors are satisfied with most aspects of their trip, with three-fourths saying they were satisfied with their overall Bozeman experience (77%). In particular, the largest share of recent visitors say they felt satisfied with the quality of accommodations (80%). Accessibility/transportation (65%) ranked slightly lower, as did interactions with locals (62%), however the most concerning rankings are around the expense. Less than half of recent visitors are satisfied with the cost of accommodations (47%) while even fewer were satisfied with the destination's overall affordability (38%).

4. Suggested improvements center on addressing high costs and better infrastructure.

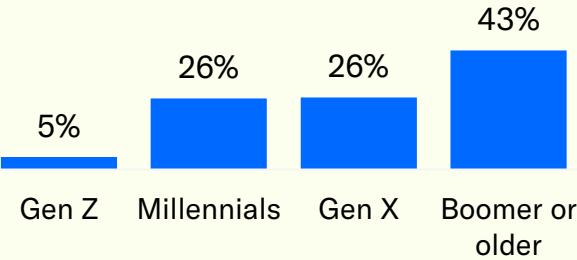
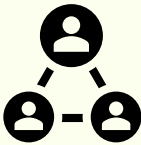
While one in four (24%) recent visitors had no suggestions for how to improve Bozeman as a destination for visitors, the most frequently suggested improvement was affordability (16%) followed by addressing traffic and congestion (9%). Many other suggestions centered around these two themes of affordability and infrastructure improvements, such as affordable lodgings (7%) and affordable housing (5%), as well as infrastructure improvements (4%), better public transportation (3%), and better signage (1%).

Infographic Summaries

Montana Residents

Demographic Snapshot

Generations

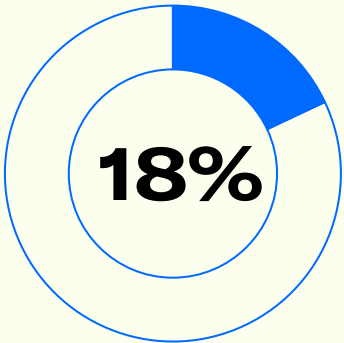


Average Age

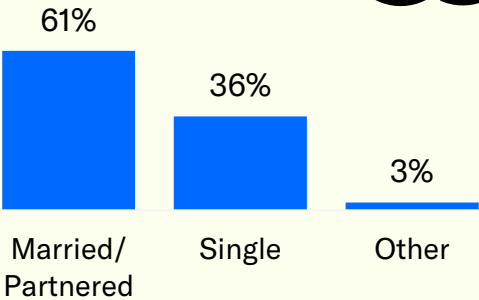
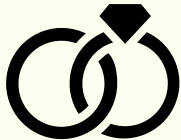


53.8
Years Old

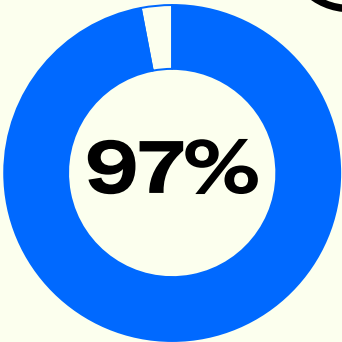
Parents of Children Under 18



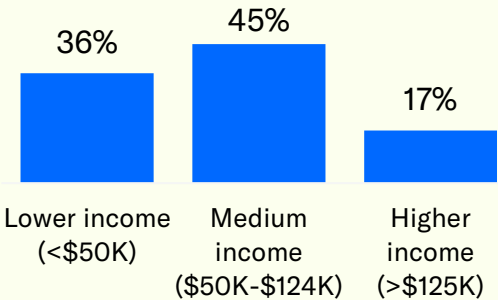
Marital Status



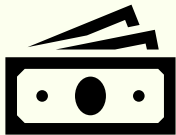
Past Bozeman Visitors



Income Brackets

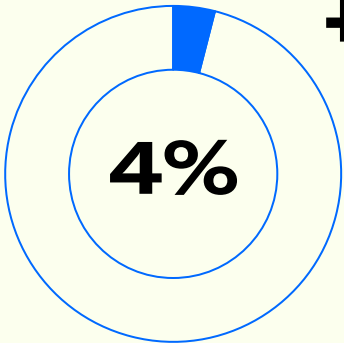
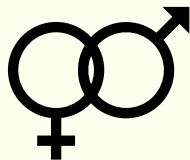


Household Income



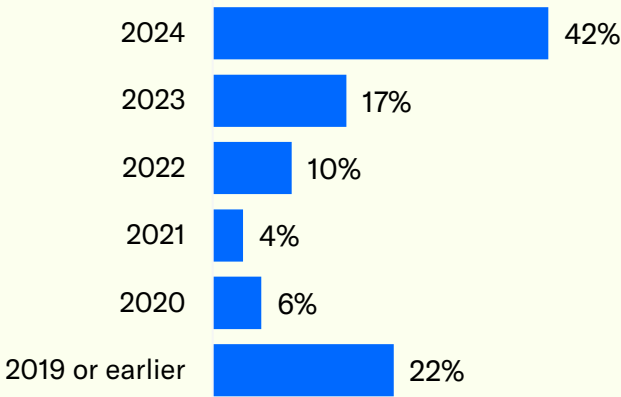
\$77,718

LGBTQ+

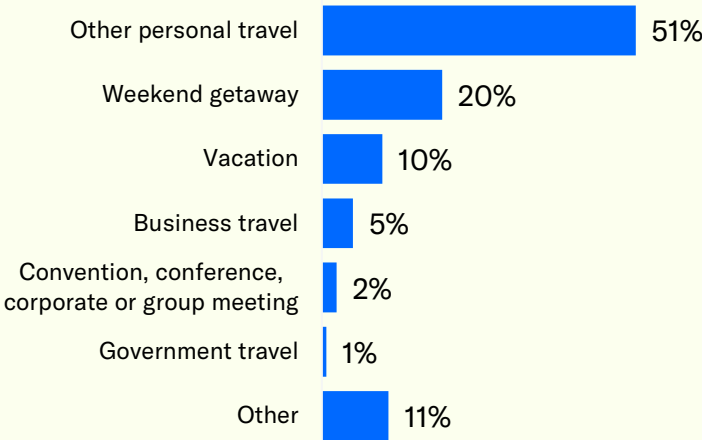


Most Recent Bozeman Trip Details

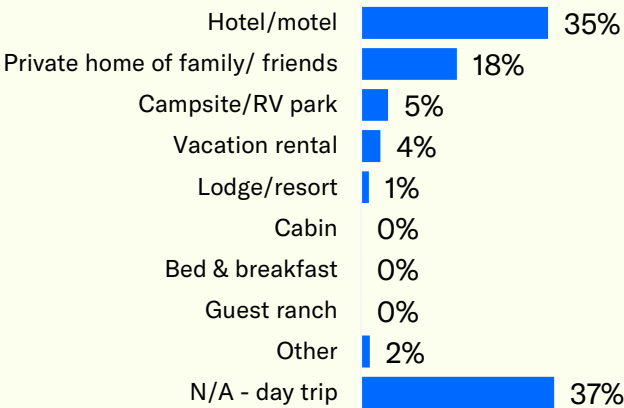
Year of Most Recent Trip



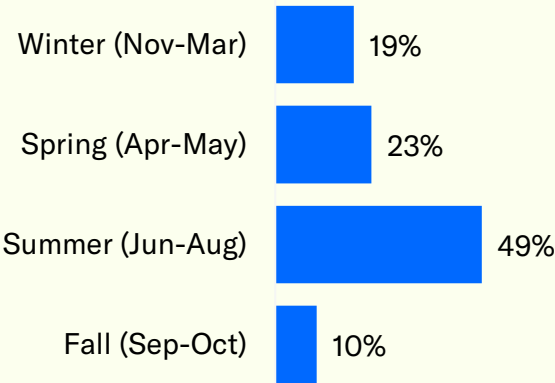
Trip Purpose



Lodging Type



Season of Trip

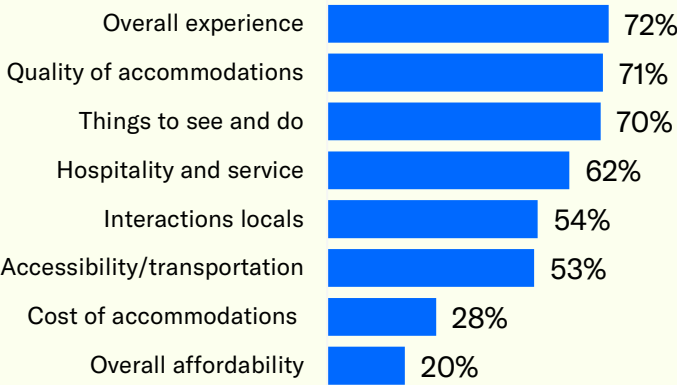


Activities Participated In

Shopping	43%
Microbrewery	17%
Bar/ nightclub	17%
Hiking	15%
Museum	15%
Wildlife	15%
Live sporting event	11%
Fishing	8%
Concert	8%
Festival/event	7%

Trip Satisfaction

% Satisfied or Extremely Satisfied

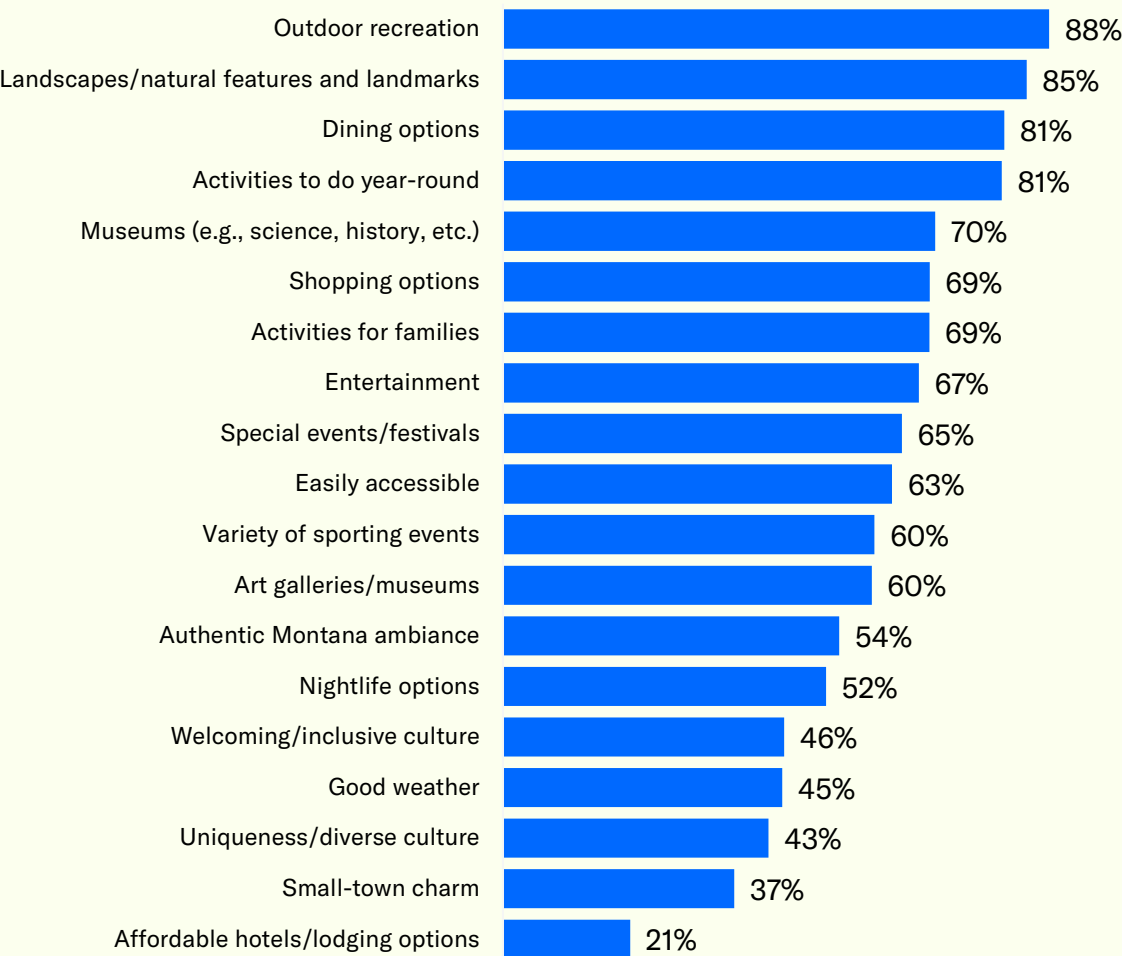


Bozeman Perceptions

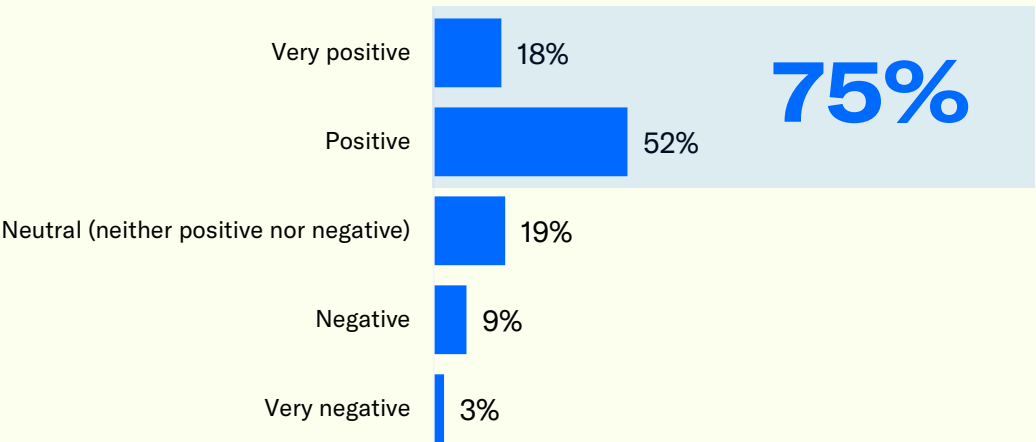
Montana
Residents

Bozeman Attribute Ratings

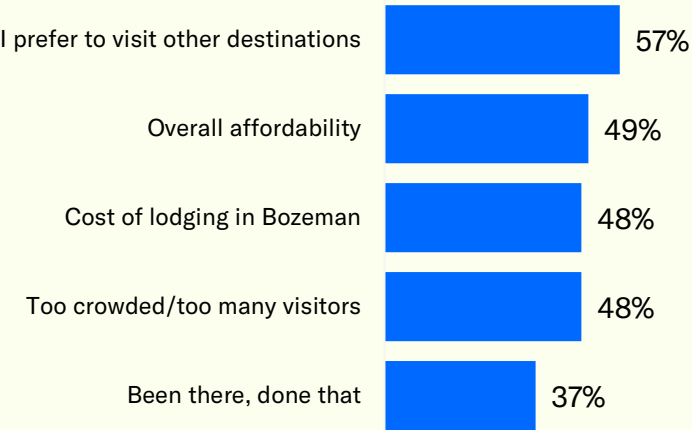
(% “Good” or “Very Good”)



Overall Perceptions of Bozeman



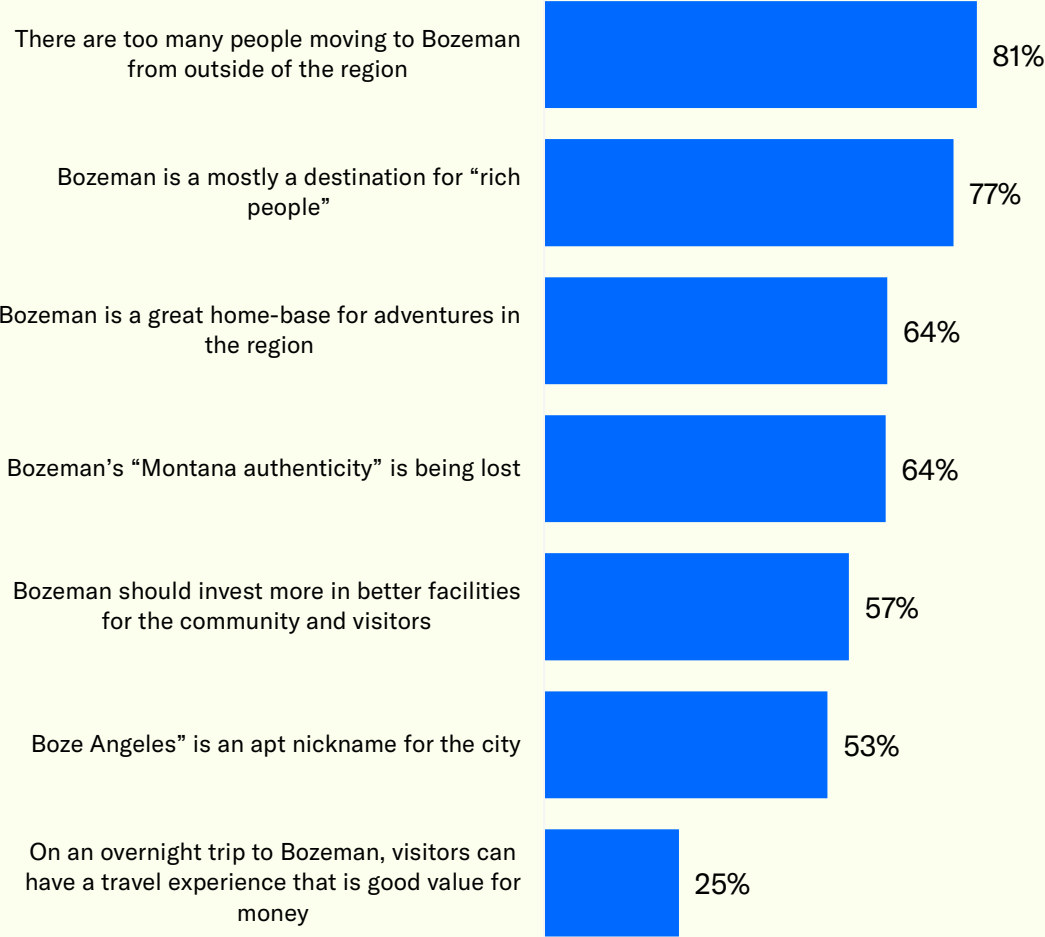
Top Deterrents to Visiting Bozeman



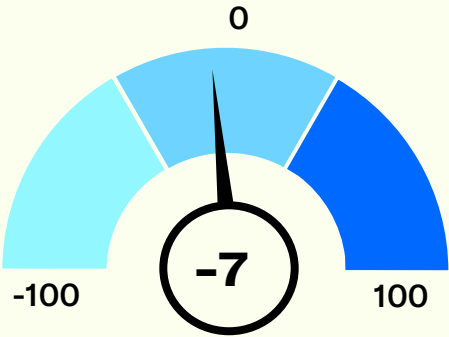
Bozeman Perceptions - Continued

Bozeman Statements – Agreement Levels

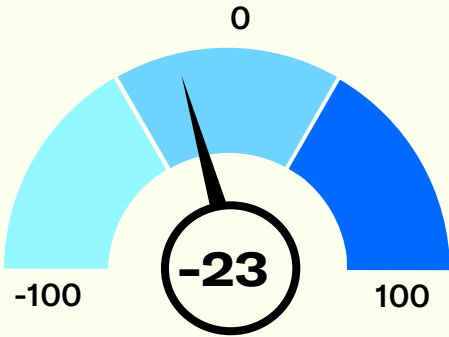
(% “Agree” or “Strongly Agree”)



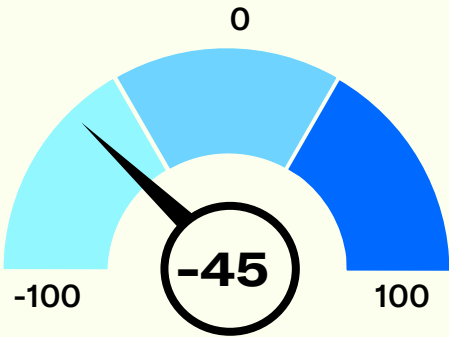
Likelihood to Recommend Bozeman as...



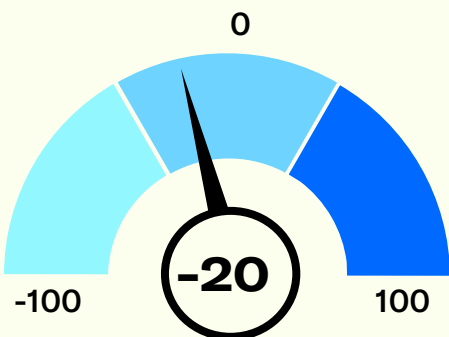
A Leisure Destination



For a Sporting Event



For a Business Meeting or Event

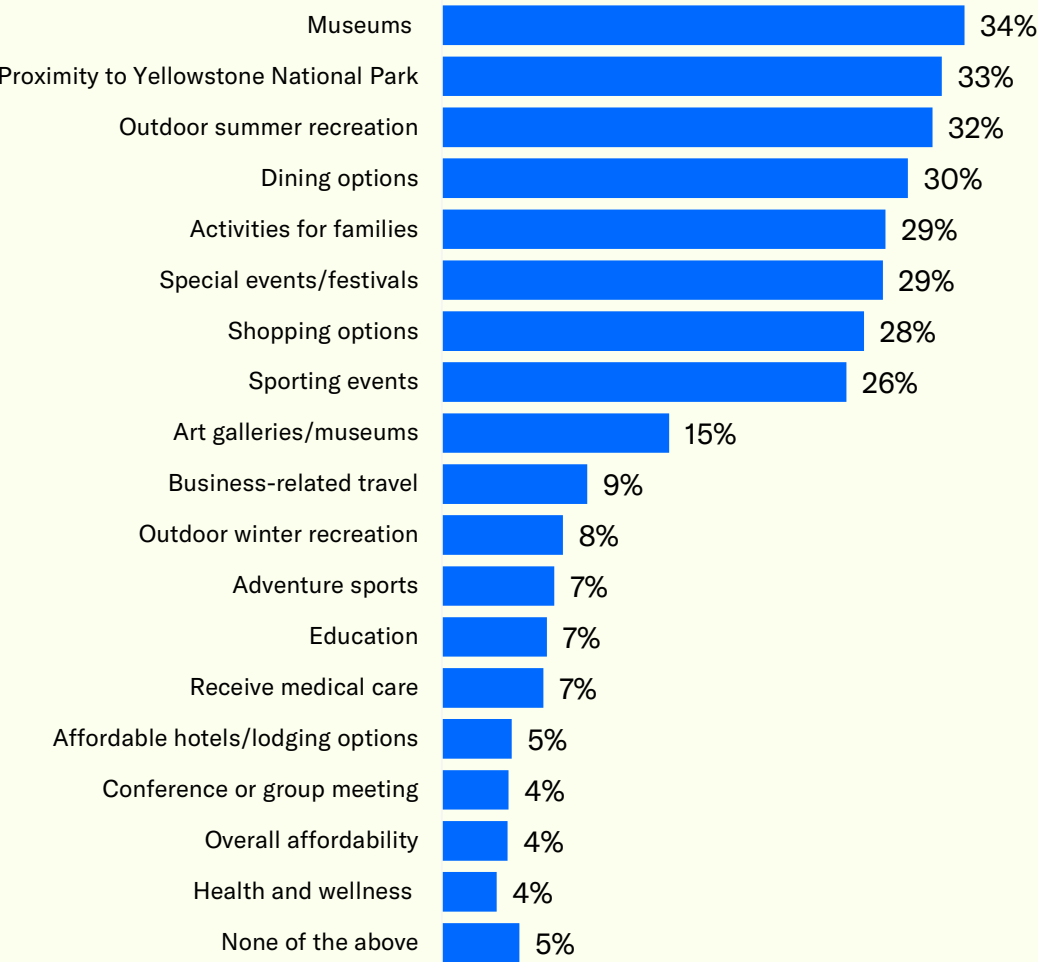


For a Special Event

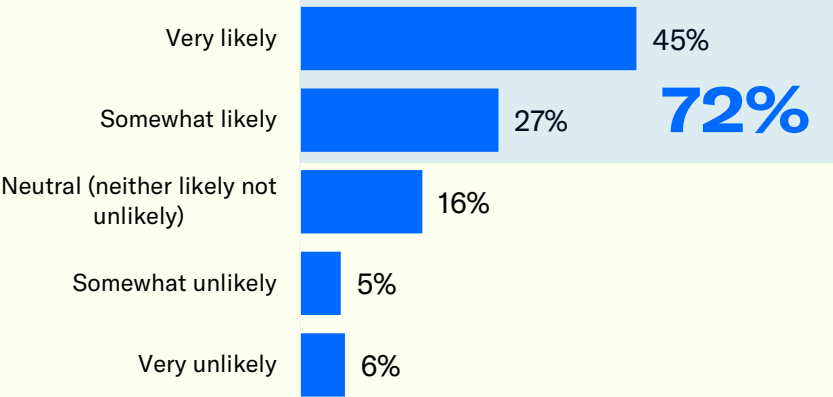
Future Bozeman Visitation

Montana
Resident

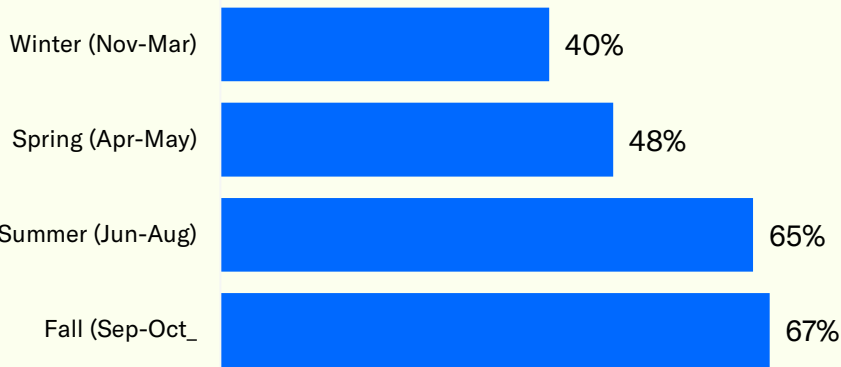
Reasons Likely to Visit in the Next Two Years



Likelihood to Visit – Next 2 Years

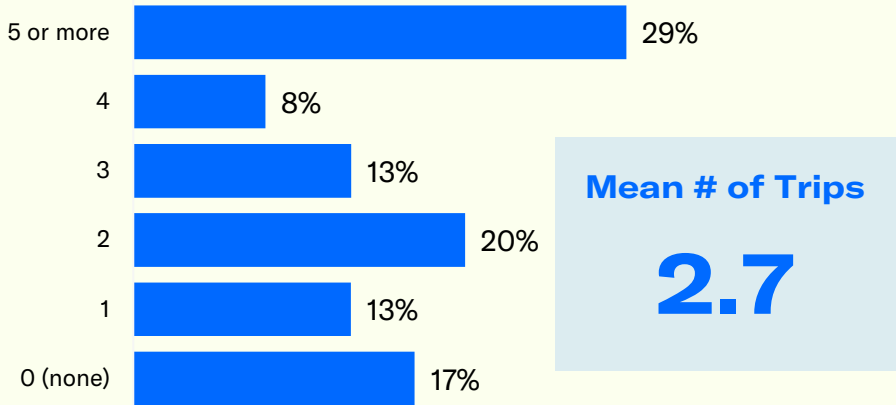


Likeliest Month of Visit



General Montana Travel

Number of Overnight Trips within Montana *Past 12 Months*



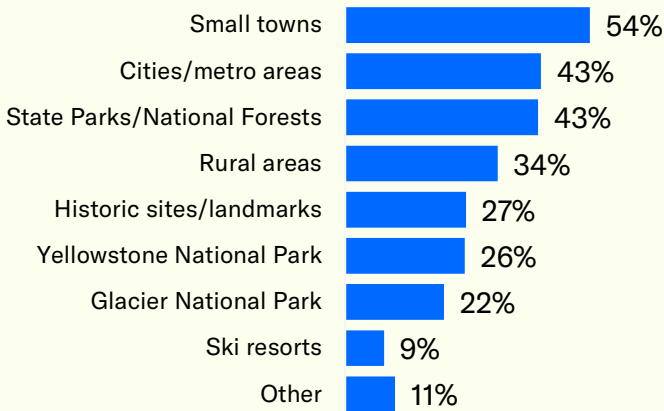
Average Number of Leisure Trips *Past 12 Months*



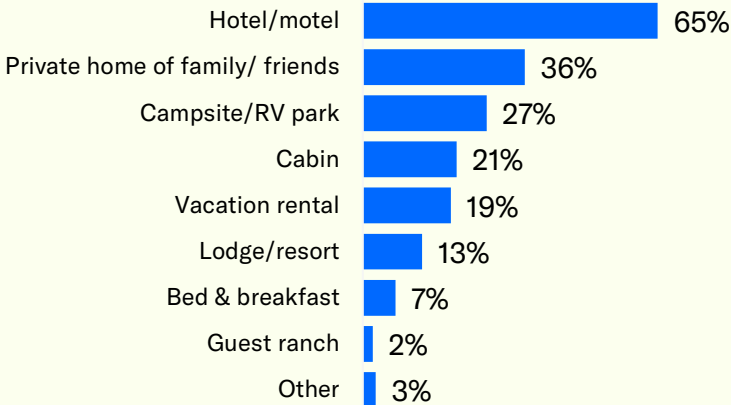
Average Number of Bozeman Visits *As an adult*



Typical Montana Overnight Destination Types



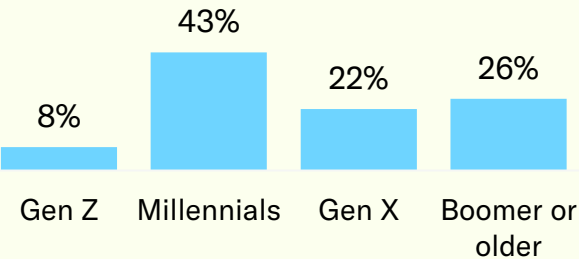
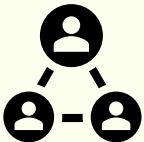
Typical Montana Lodging Types



Idaho Residents

Demographic Snapshot

Generations

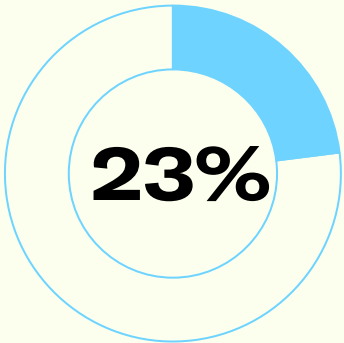


Average Age

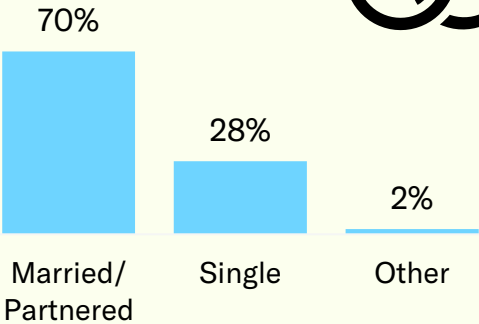
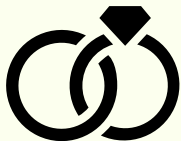


46.7
Years Old

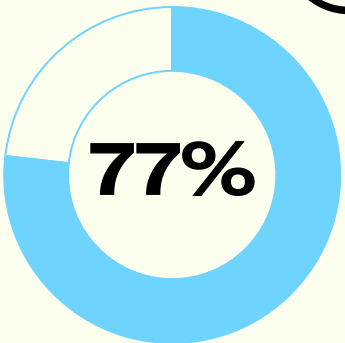
Parents of Children Under 18



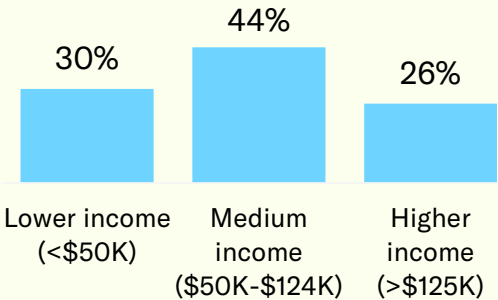
Marital Status



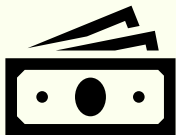
Past Bozeman Visitors



Income Brackets

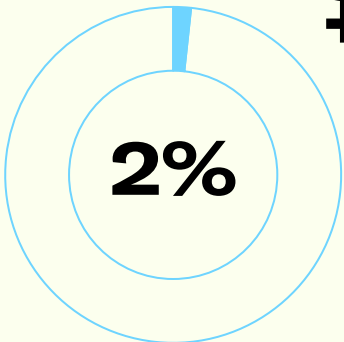
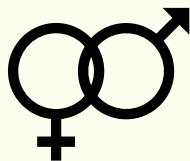


Household Income



\$85,790

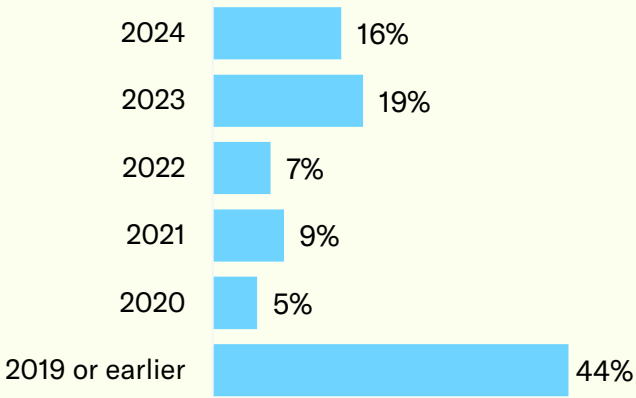
LGBTQ+



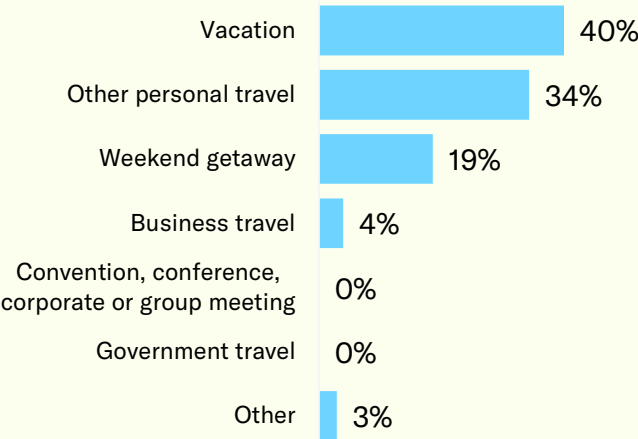
Most Recent Bozeman Trip Details

Idaho
Residents

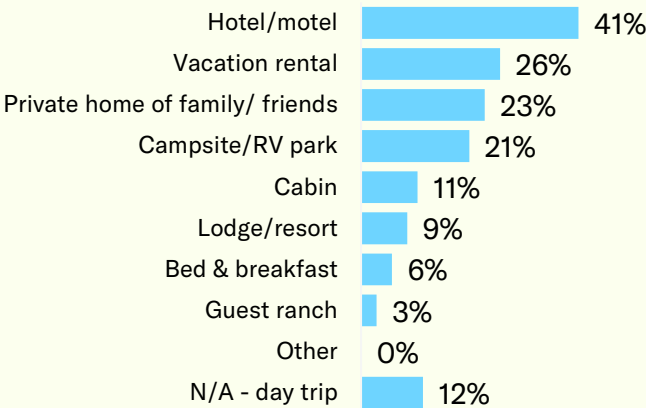
Year of Most Recent Trip



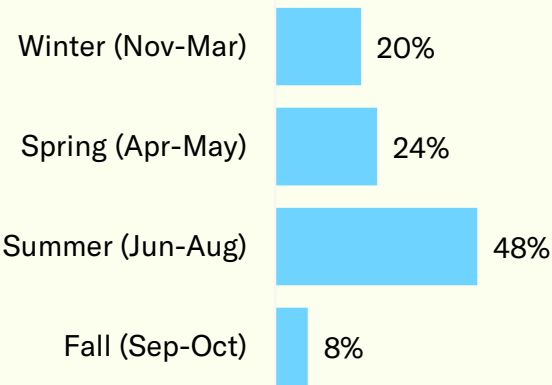
Trip Purpose



Lodging Type



Season of Trip



Activities Participated In

Shopping	61%
Festival/ event	34%
Wildlife	29%
Water activities	27%
Bar/ nightclub	26%
Hiking	23%
Concert	22%
Live sporting event	19%
Museum	18%
Fishing	18%

Trip Satisfaction

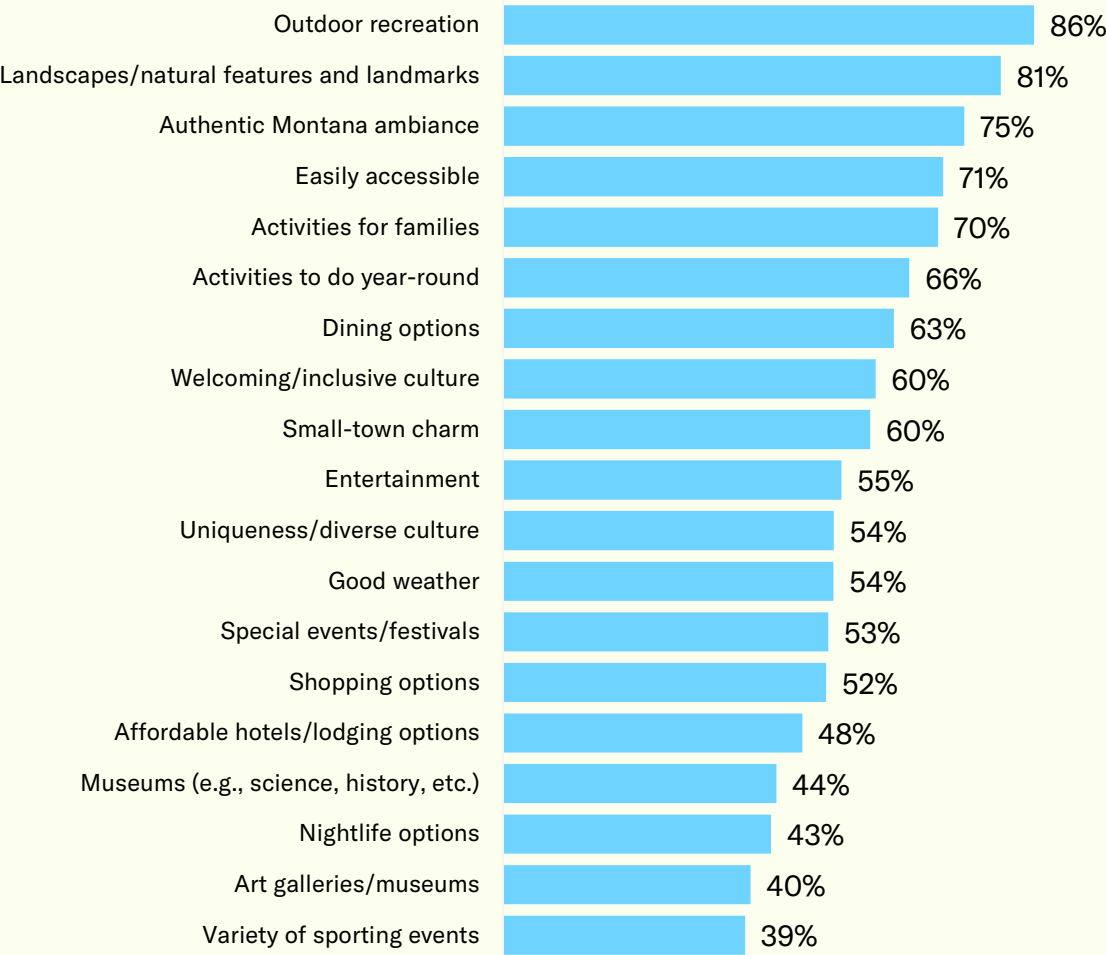
% Satisfied or Extremely Satisfied



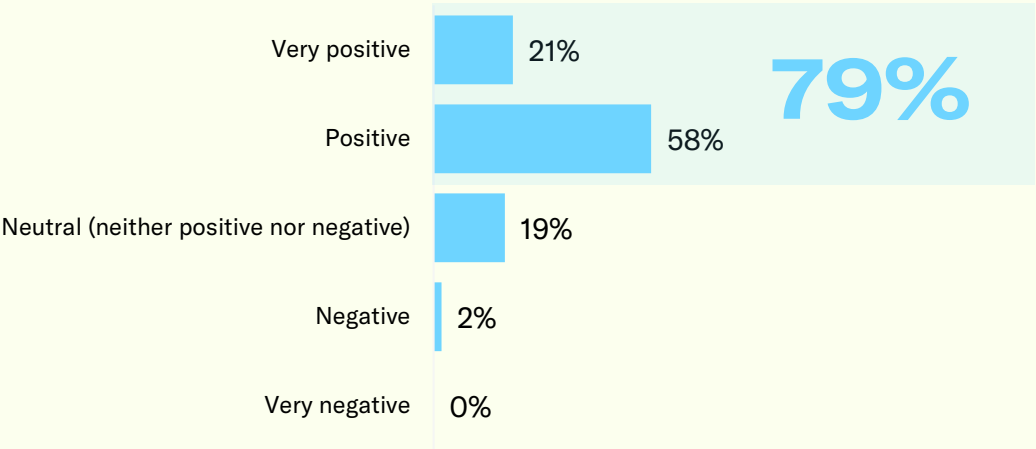
Bozeman Perceptions

Bozeman Attribute Ratings

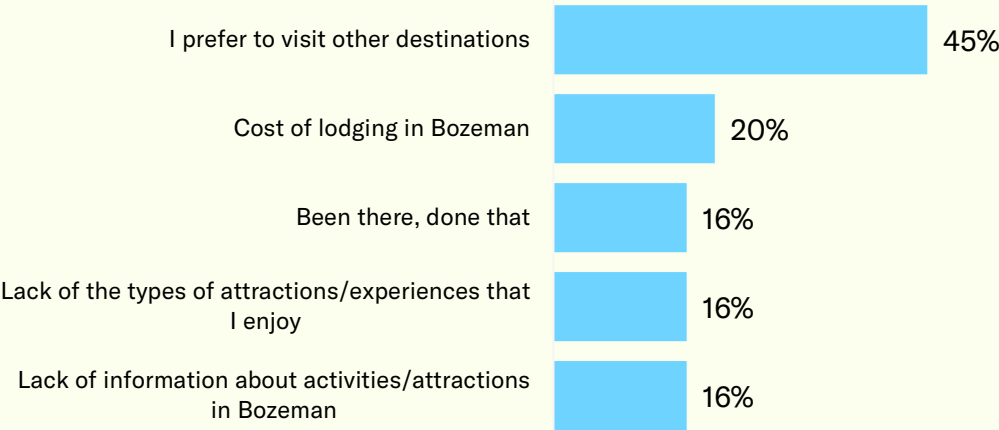
(% “Good” or “Very Good”)



Overall Perceptions of Bozeman



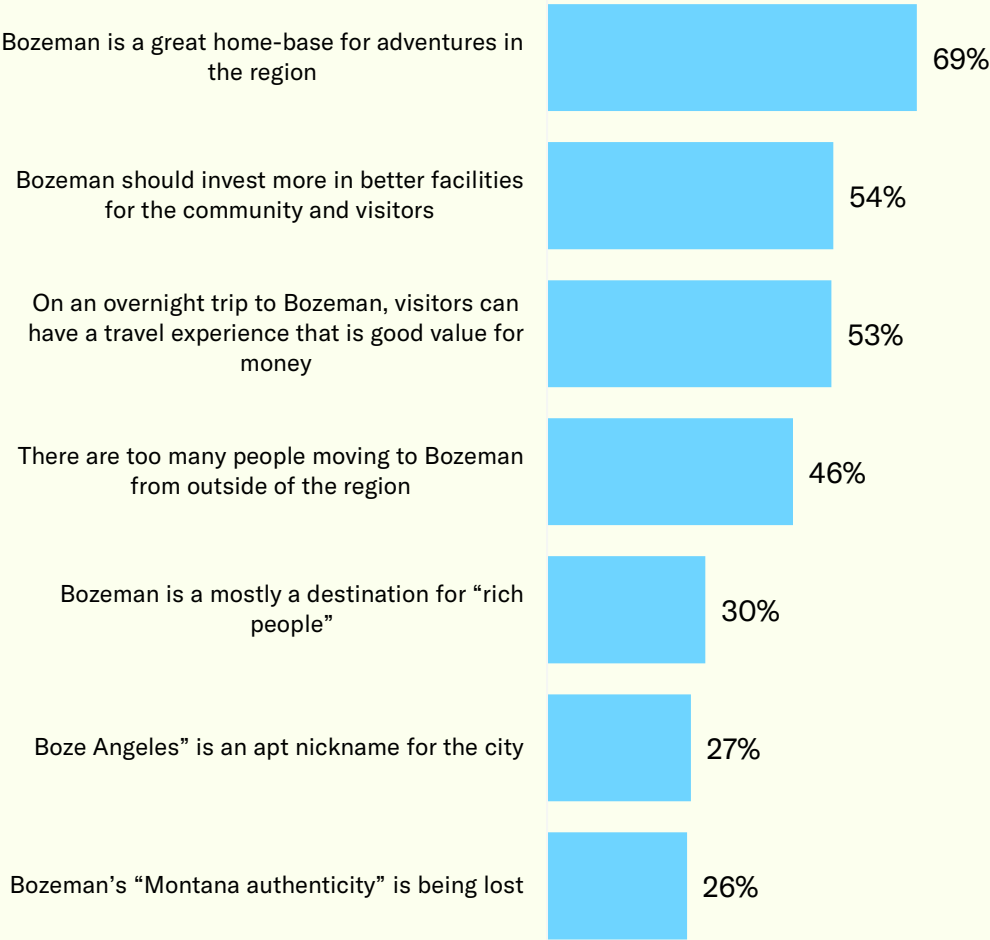
Top Deterrents to Visiting Bozeman



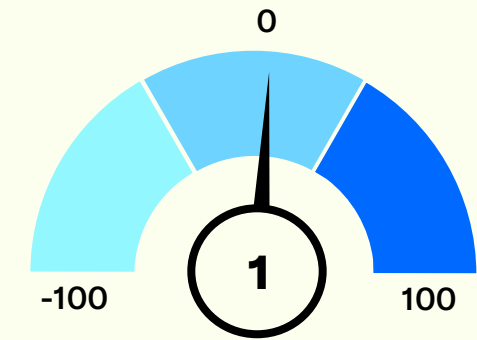
Bozeman Perceptions - Continued

Bozeman Statements – Agreement Levels

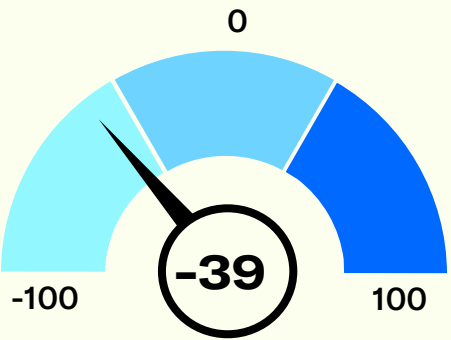
(% “Agree” or “Strongly Agree”)



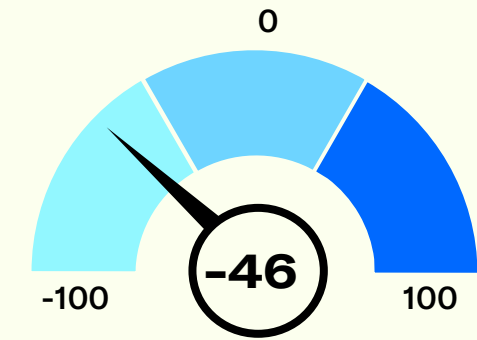
Likelihood to Recommend Bozeman as...



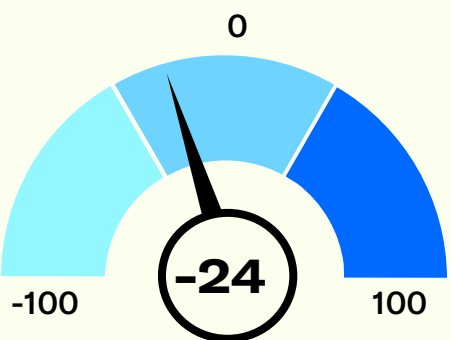
A Leisure Destination



For a Sporting Event



For a Business Meeting or Event

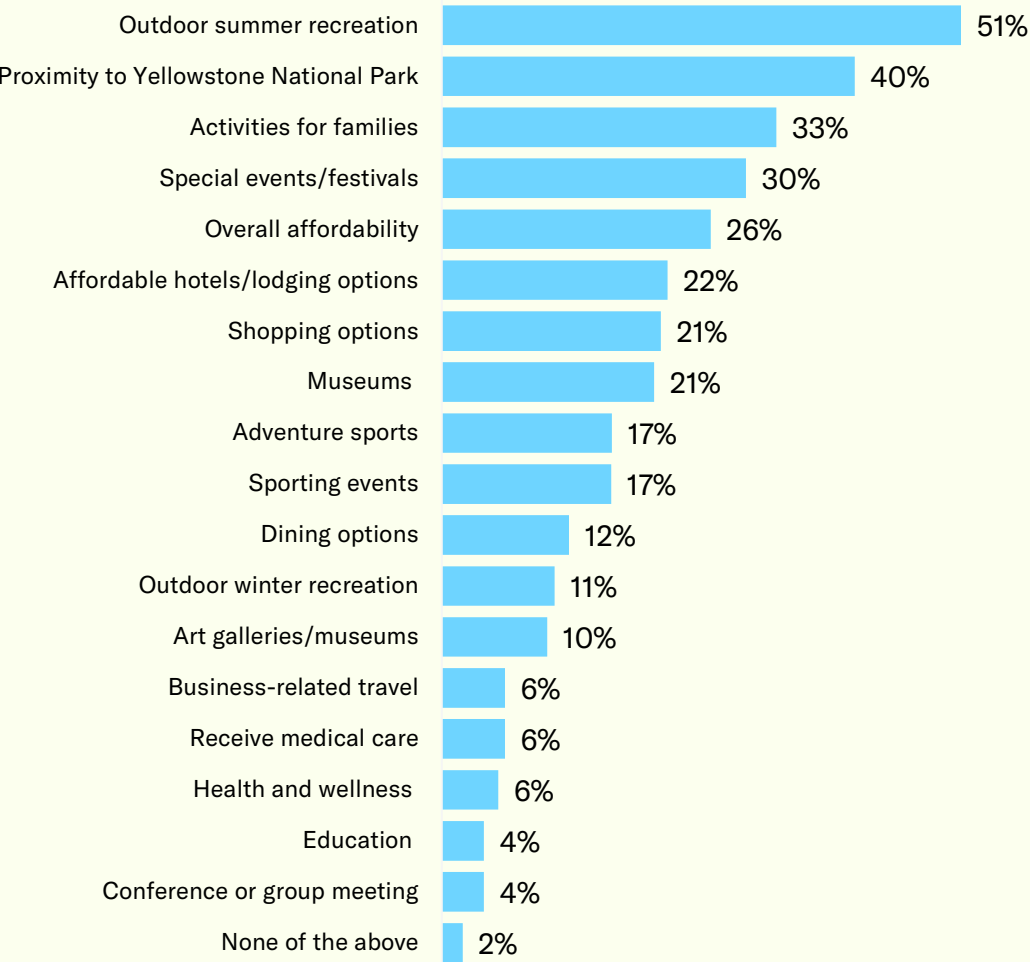


For a Special Event

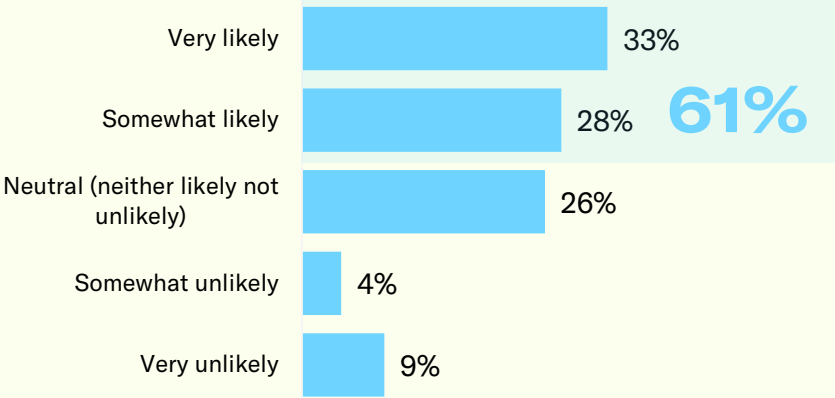
Future Bozeman Visitation

Idaho
Residents

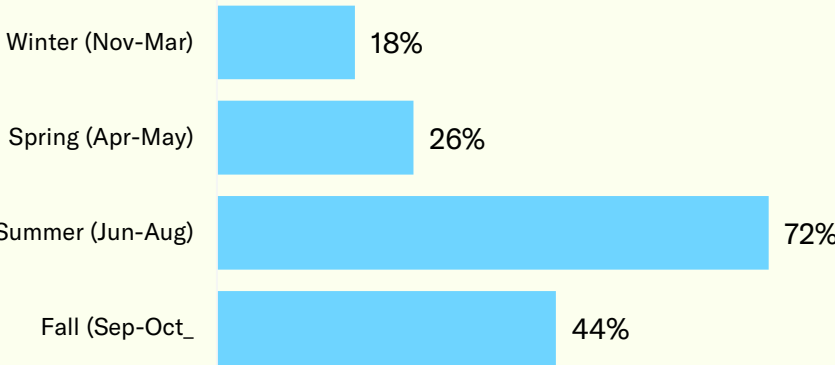
Reasons Likely to Visit in the Next Two Years



Likelihood to Visit – Next 2 Years

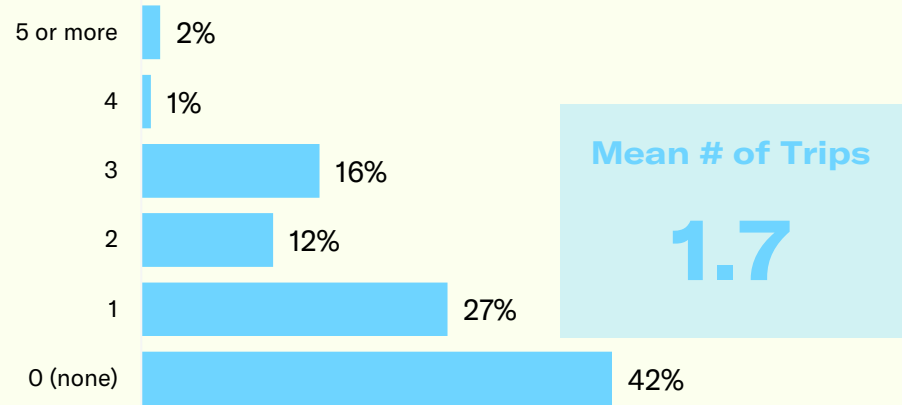


Likeliest Month of Visit



General Montana Travel

Number of Overnight Trips within Montana *Past 12 Months*



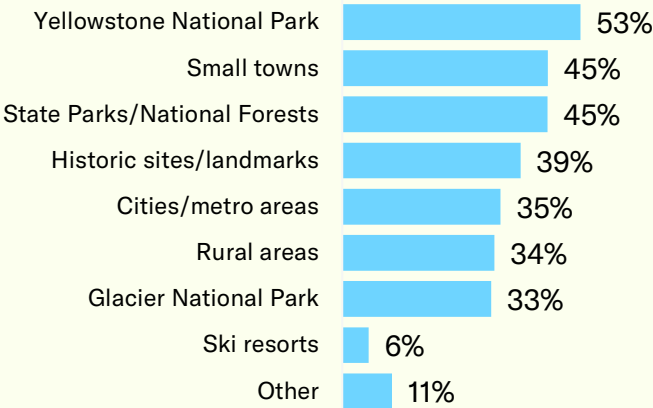
Average Number of Leisure Trips *Past 12 Months*



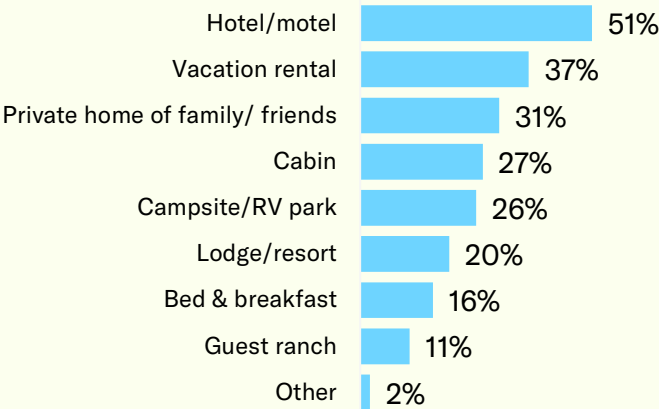
Average Number of Bozeman Visits *As an adult*



Typical Montana Overnight Destination Types



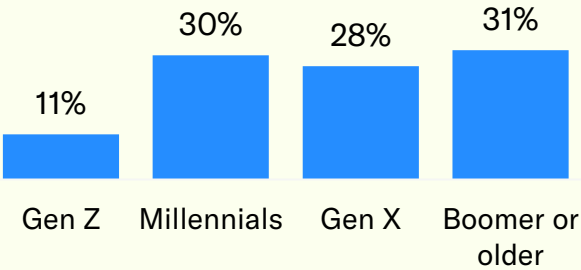
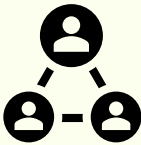
Typical Montana Lodging Types



Wyoming Residents

Demographic Snapshot

Generations

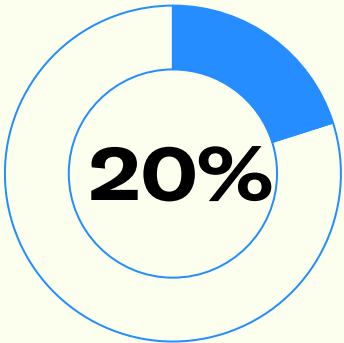


Average Age

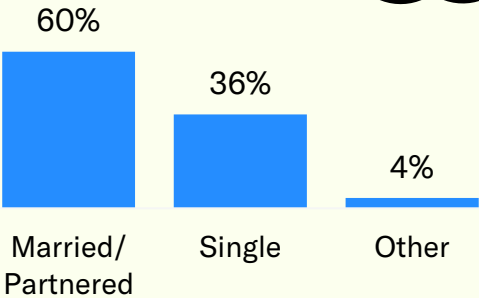
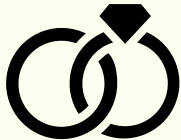


49.1
Years Old

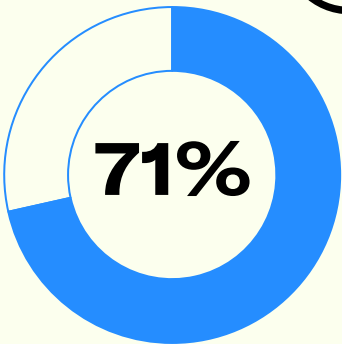
Parents of Children Under 18



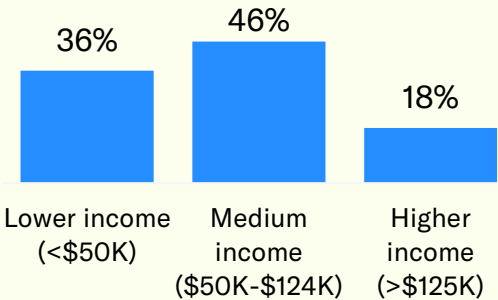
Marital Status



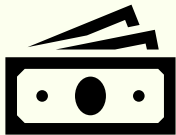
Past Bozeman Visitors



Income Brackets

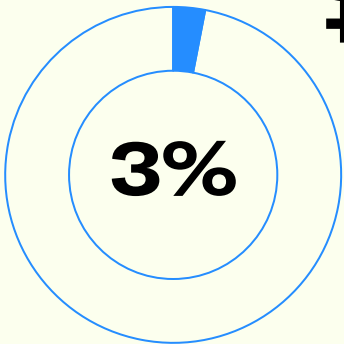
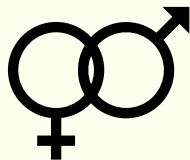


Household Income



\$81,526

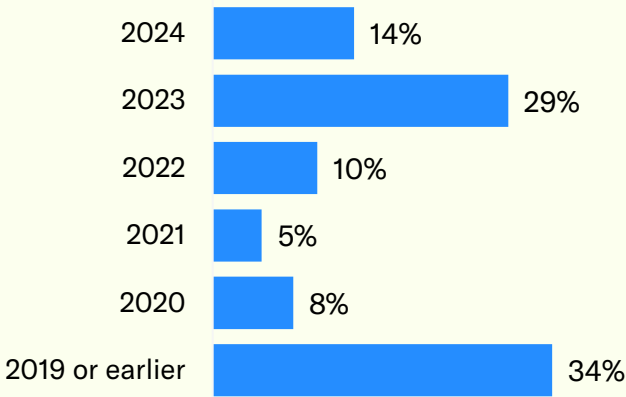
LGBTQ+



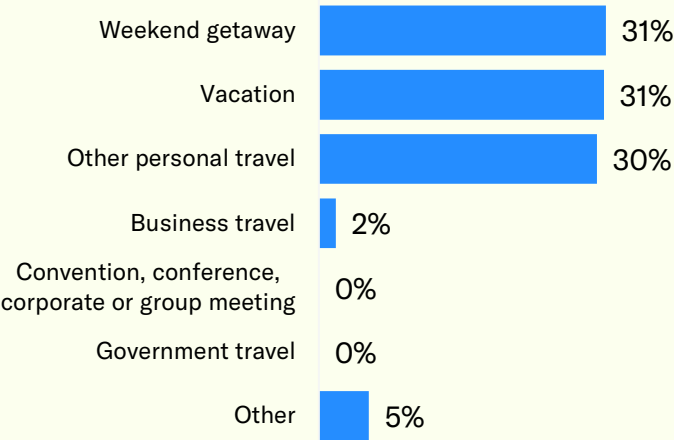
Most Recent Bozeman Trip Details

Wyoming Residents

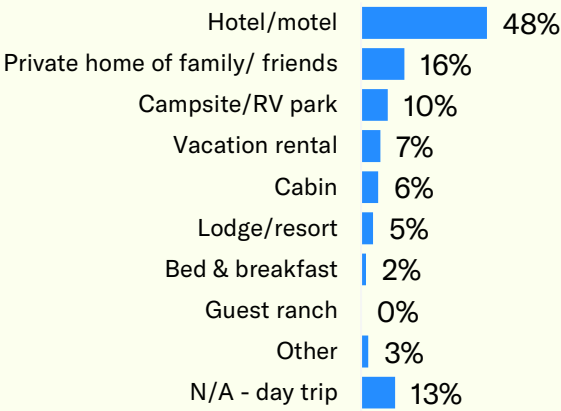
Year of Most Recent Trip



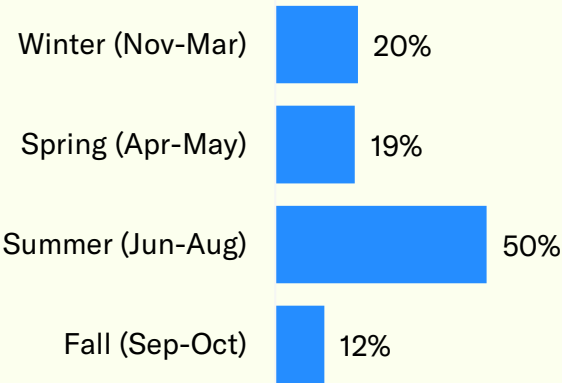
Trip Purpose



Lodging Type



Season of Trip

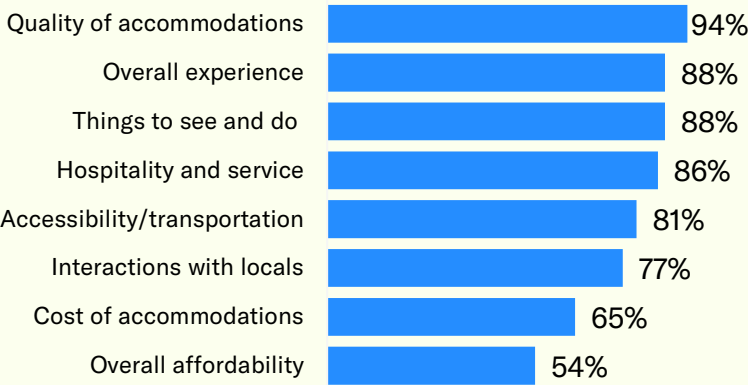


Activities Participated In

Shopping	51%
Hiking	34%
Bar/ nightclub	27%
Fishing	27%
Wildlife	24%
Museum	16%
Microbrewery	13%
Concert	10%
Festival/ event	9%
Water activities	8%

Trip Satisfaction

% Satisfied or Extremely Satisfied

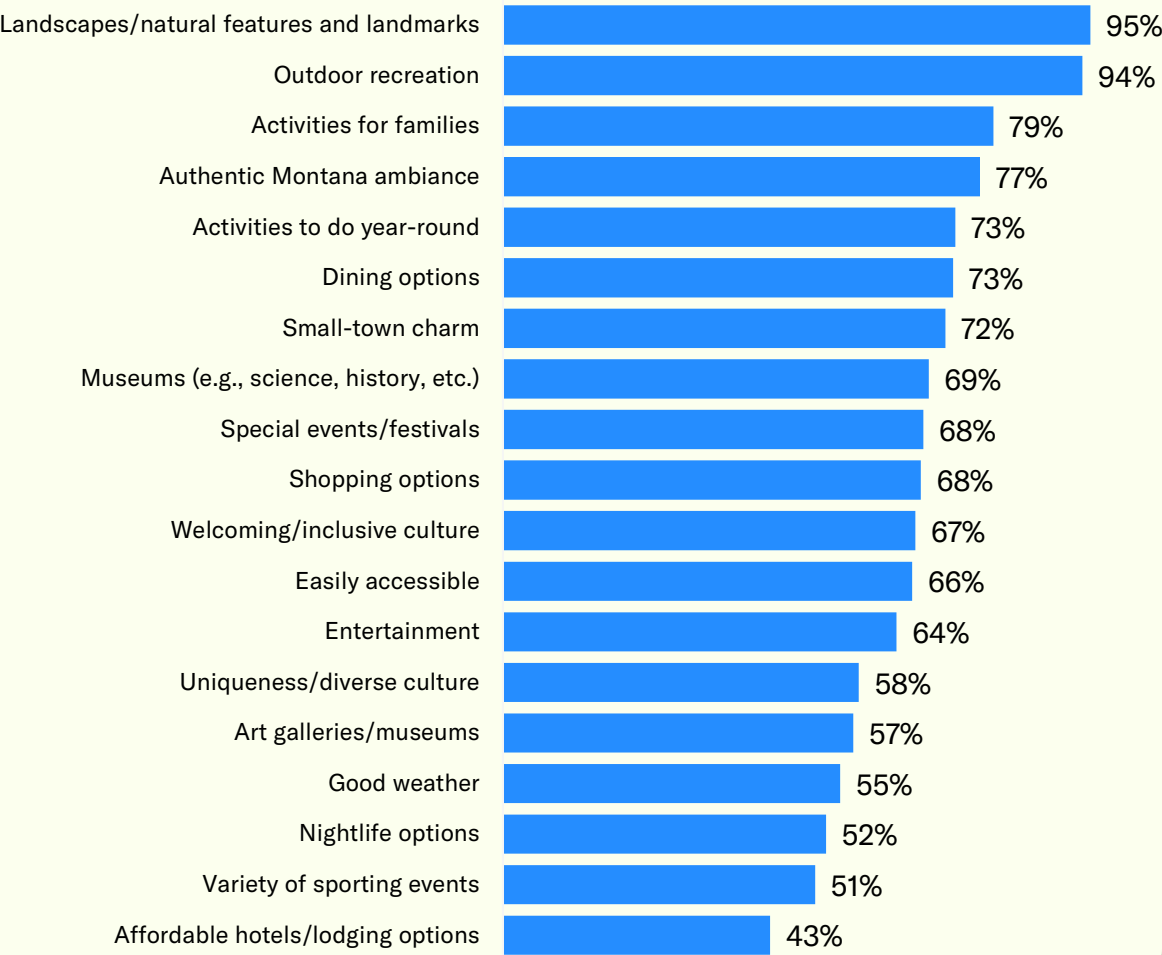


Bozeman Perceptions

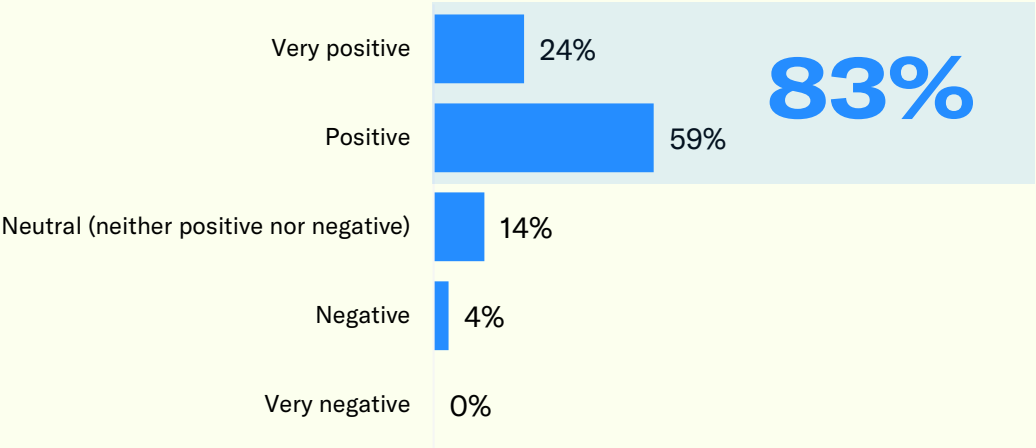
Wyoming
Residents

Bozeman Attribute Ratings

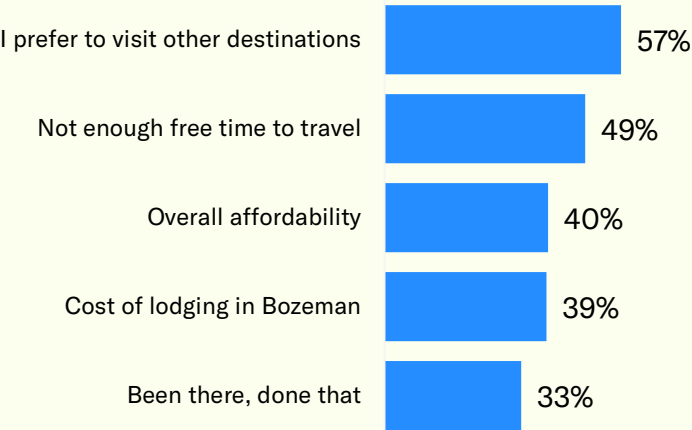
(% “Good” or “Very Good”)



Overall Perceptions of Bozeman



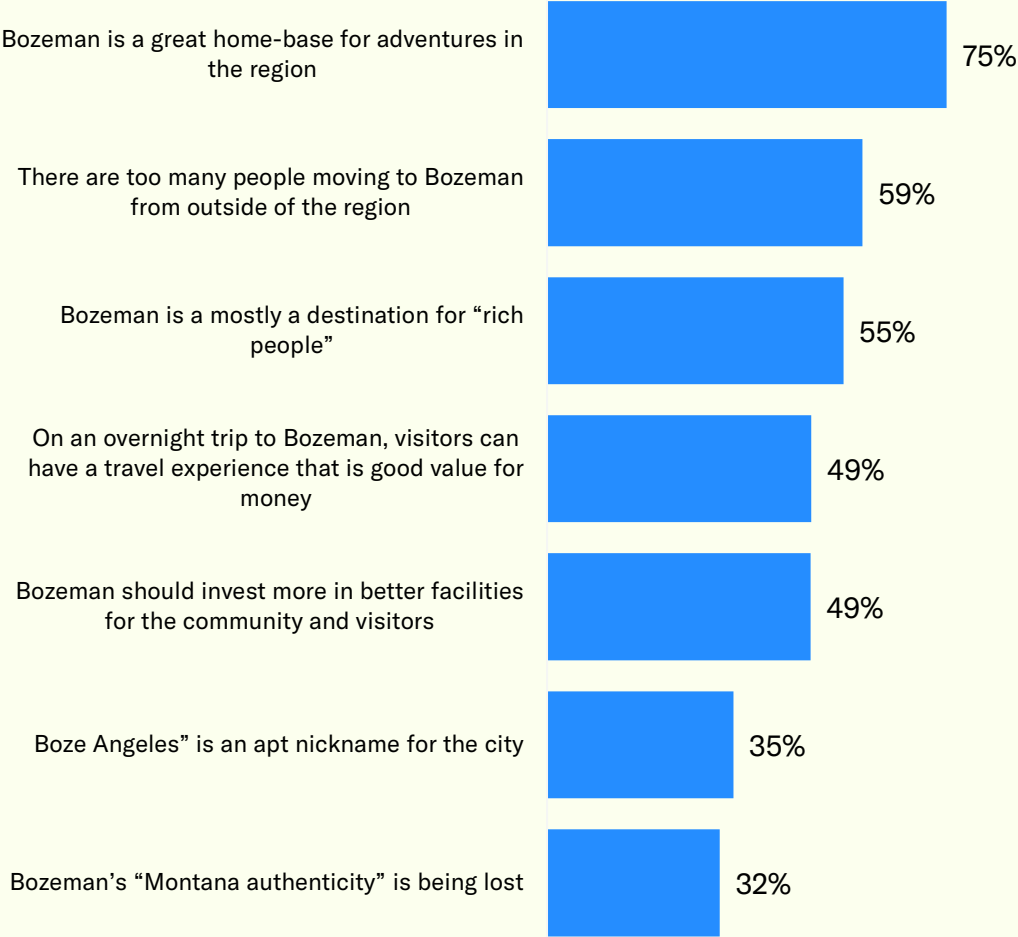
Top Deterrents to Visiting Bozeman



Bozeman Perceptions - Continued

Bozeman Statements – Agreement Levels

(% “Agree” or “Strongly Agree”)



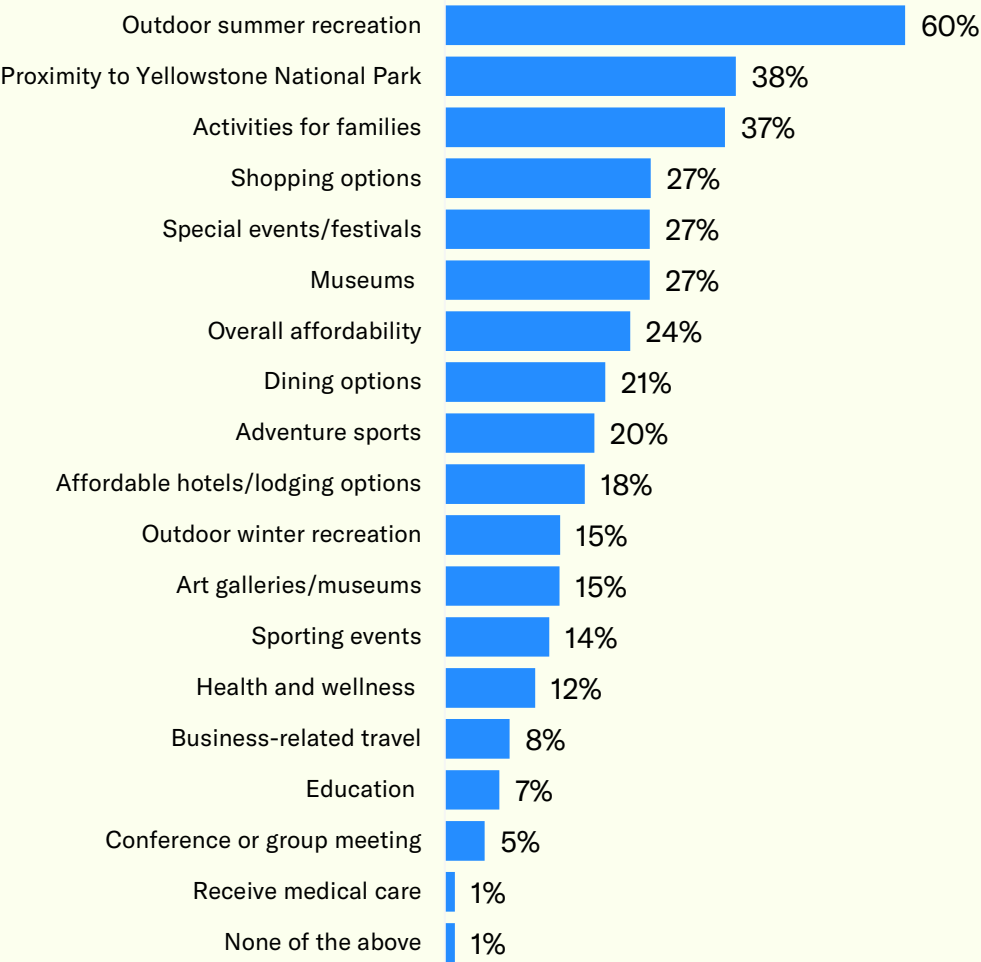
Likelihood to Recommend Bozeman as...



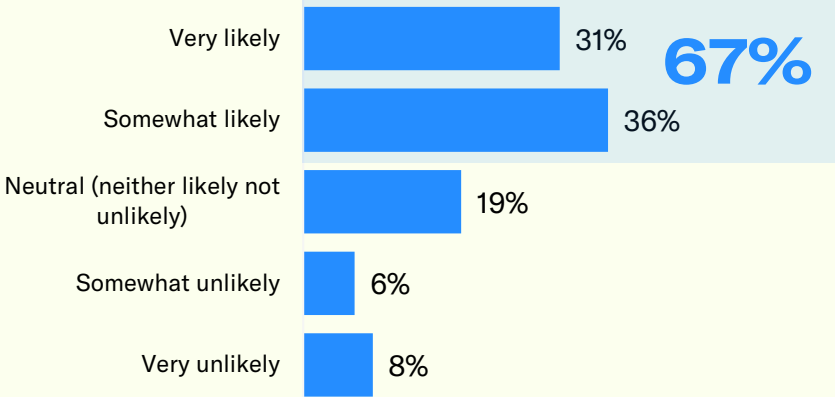
Future Bozeman Visitation

Wyoming
Residents

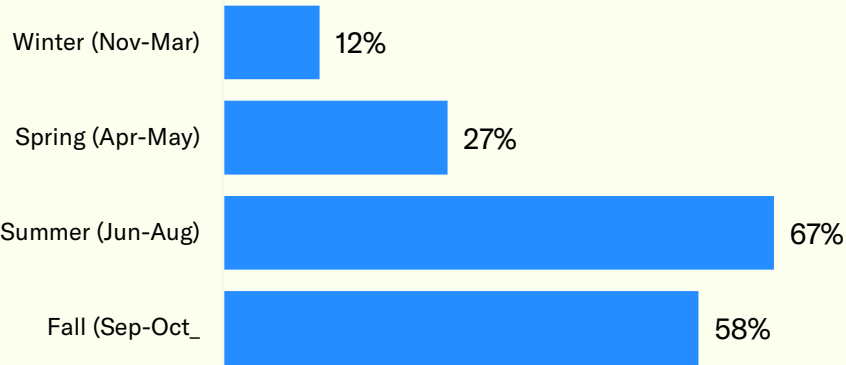
Reasons Likely to Visit in the Next Two Years



Likelihood to Visit – Next 2 Years

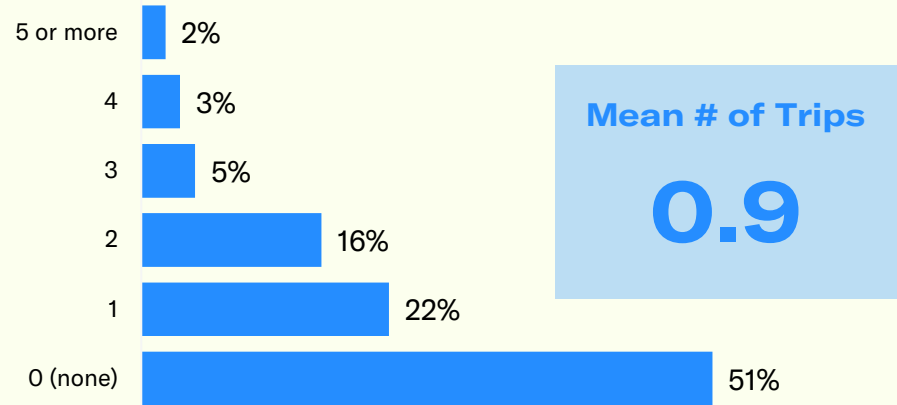


Likeliest Month of Visit



General Montana Travel

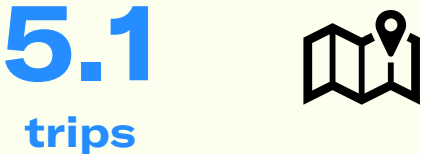
Number of Overnight Trips within Montana *Past 12 Months*



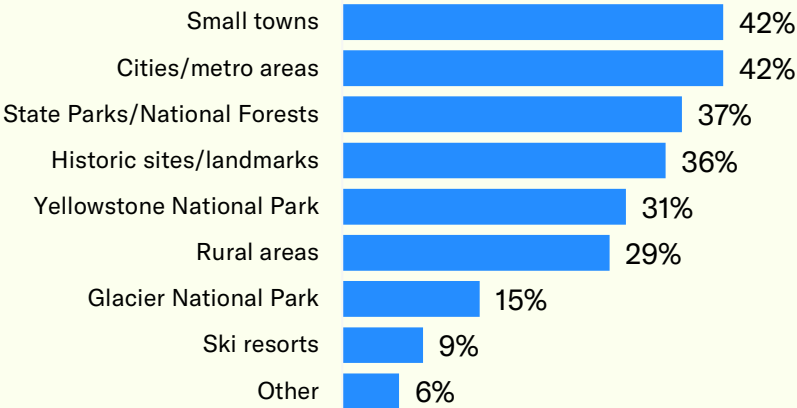
Average Number of Leisure Trips *Past 12 Months*



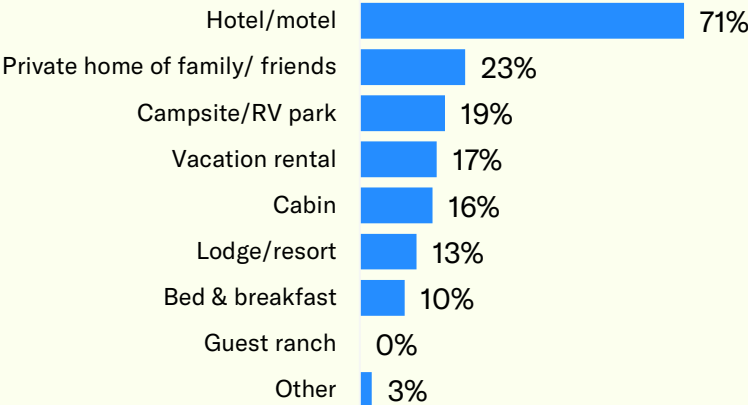
Average Number of Bozeman Visits *As an adult*



Typical Montana Overnight Destination Types



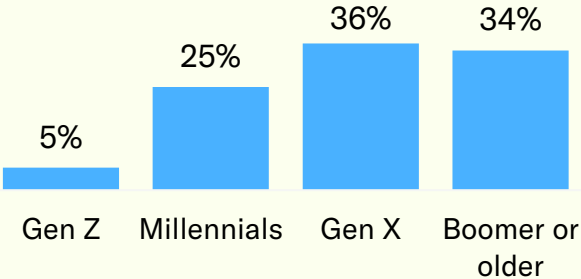
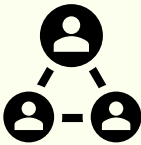
Typical Montana Lodging Types



Eastern Washington Residents

Demographic Snapshot

Generations

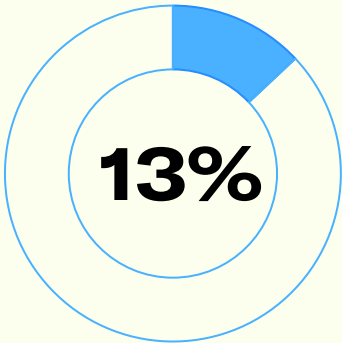


Average Age

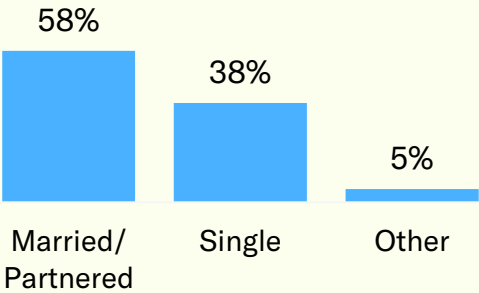
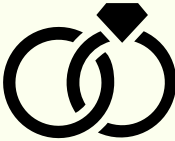


51.0
Years Old

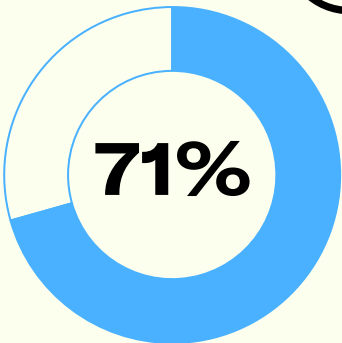
Parents of Children Under 18



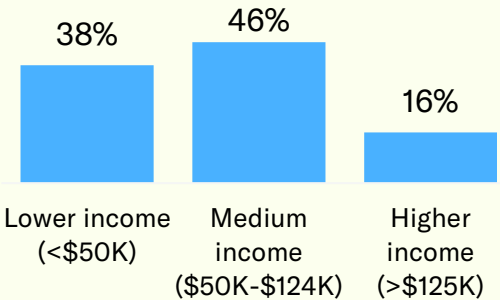
Marital Status



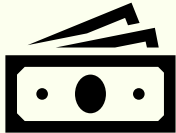
Past Bozeman Visitors



Income Brackets

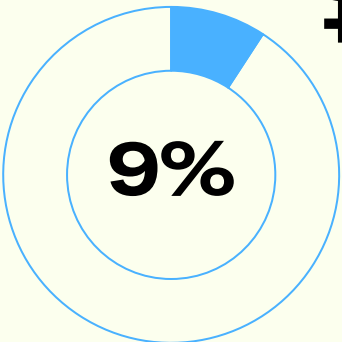
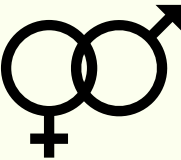


Household Income



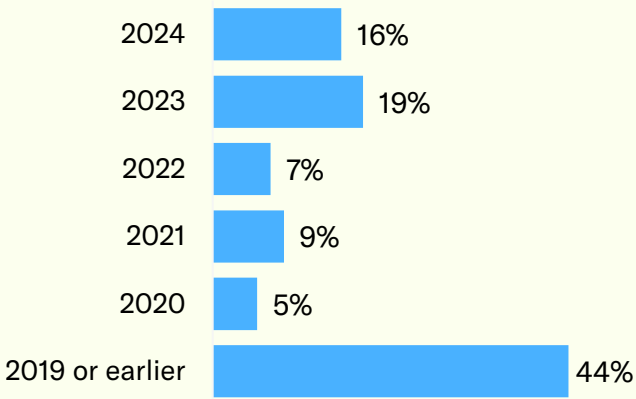
\$76,896

LGBTQ+

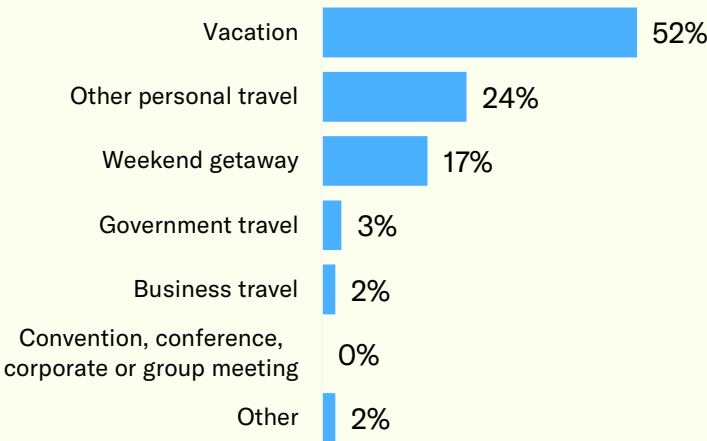


Most Recent Bozeman Trip Details

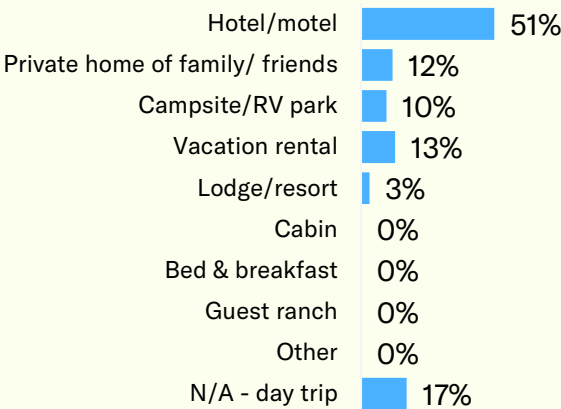
Year of Most Recent Trip



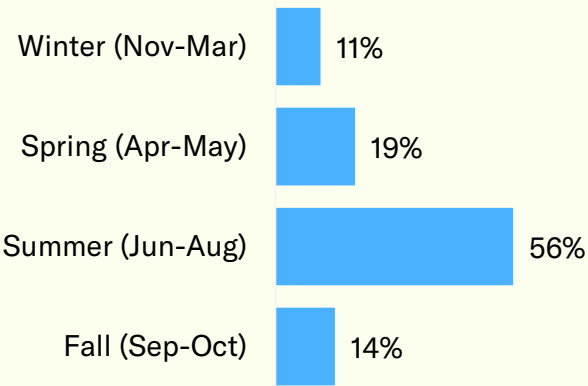
Trip Purpose



Lodging Type



Season of Trip

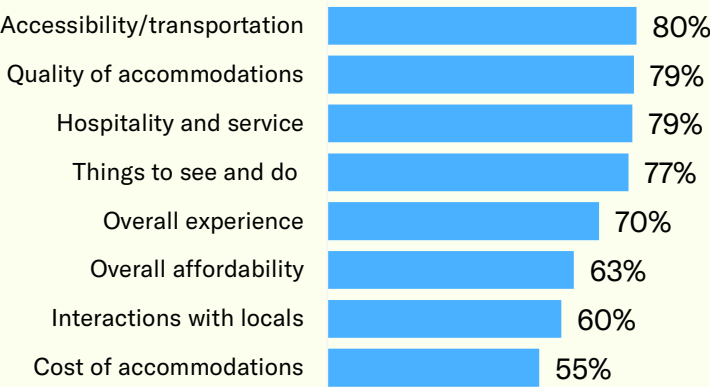


Activities Participated In

Shopping	37%
Hiking	36%
Wildlife	26%
Bar/ nightclub	19%
Water activities	17%
Museum	16%
Microbrewery	13%
Golfing	10%
Festival/ event	9%
Art gallery	9%

Trip Satisfaction

% Satisfied or Extremely Satisfied

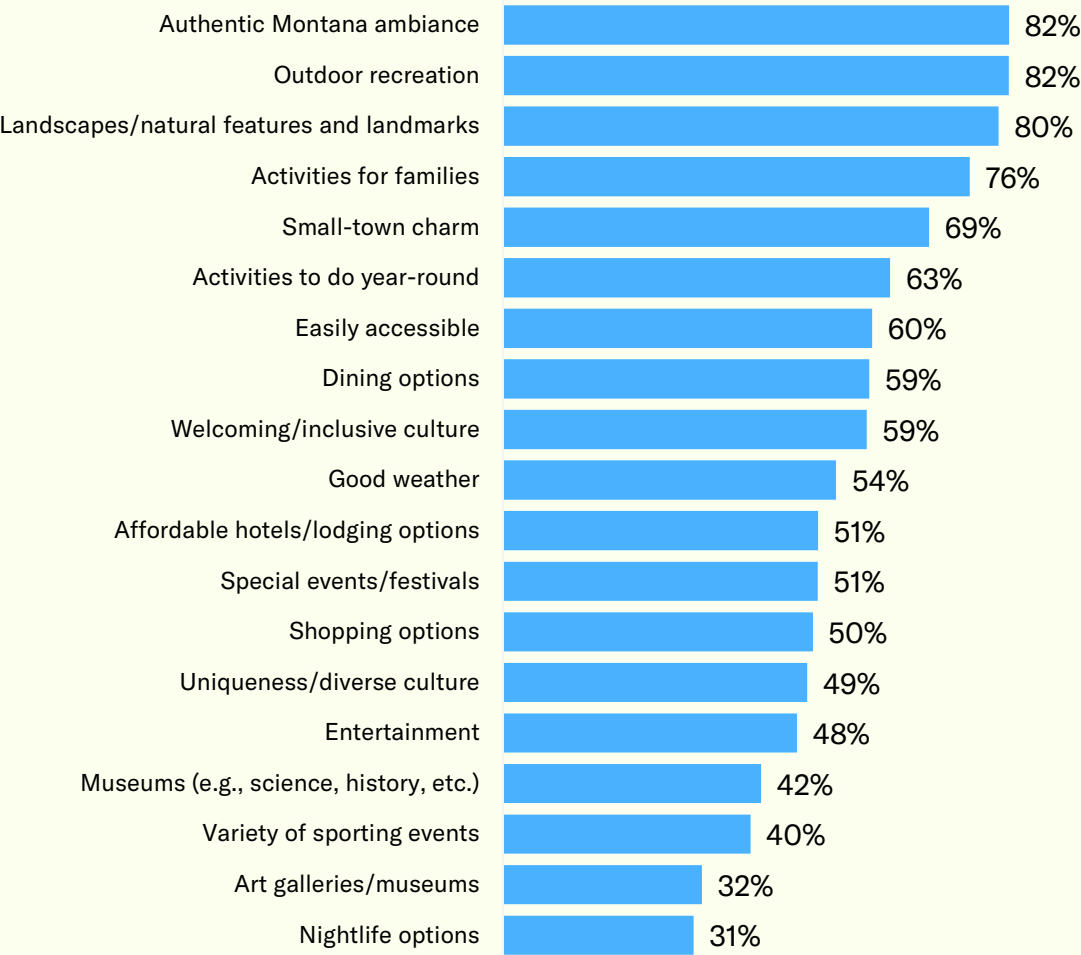


Bozeman Perceptions

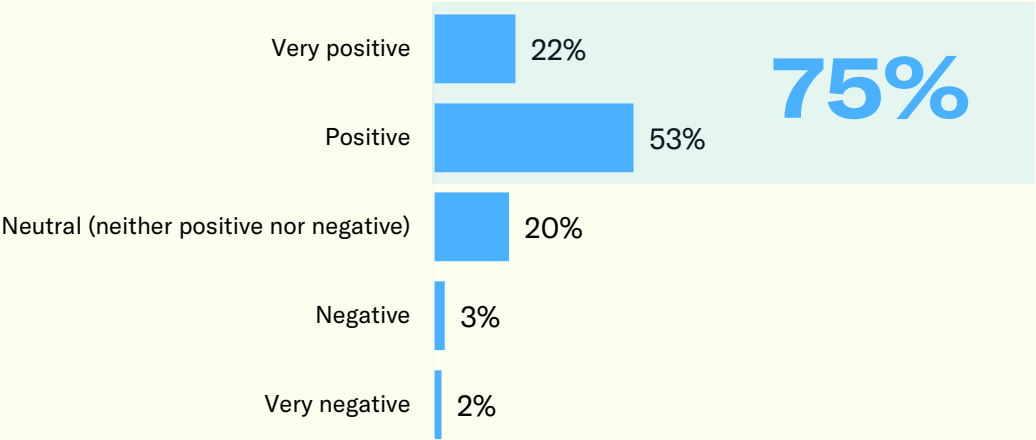
Eastern Washington
Residents

Bozeman Attribute Ratings

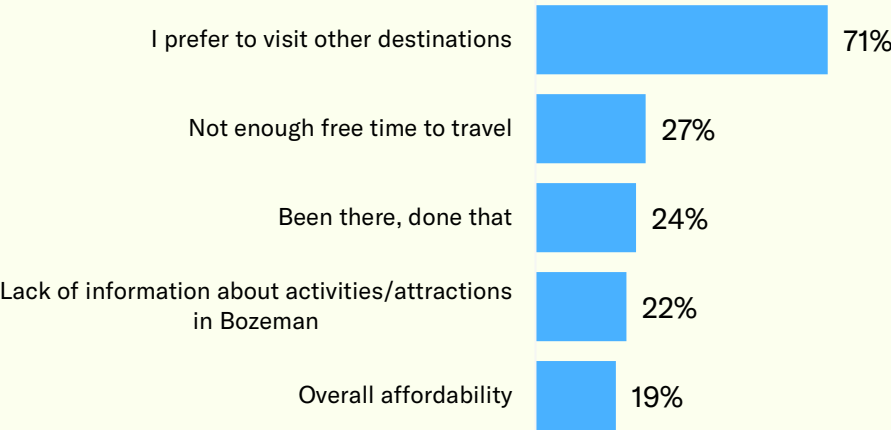
(% “Good” or “Very Good”)



Overall Perceptions of Bozeman



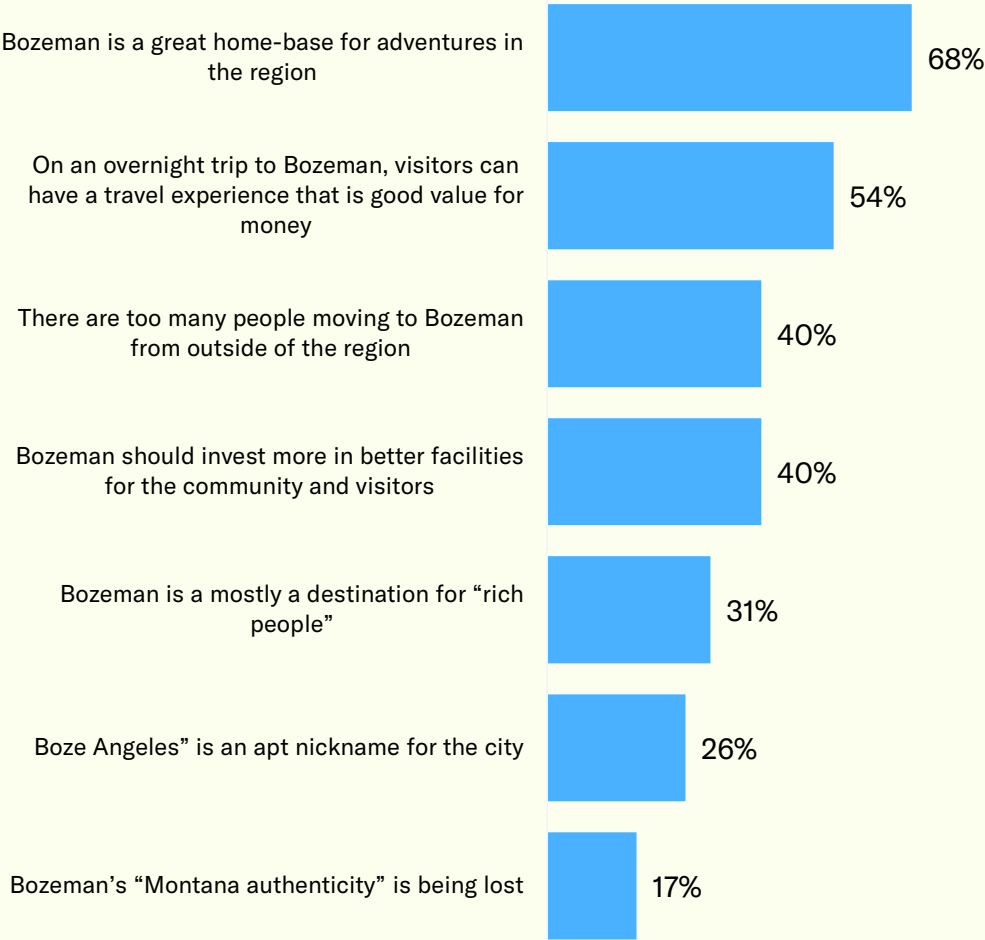
Top Deterrents to Visiting Bozeman



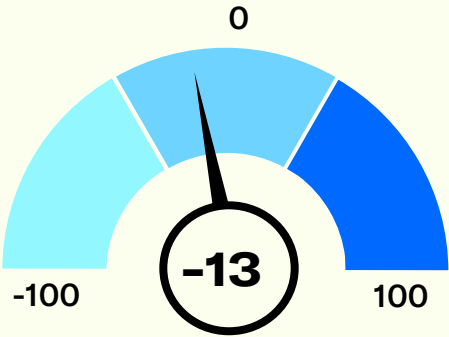
Bozeman Perceptions - Continued

Bozeman Statements – Agreement Levels

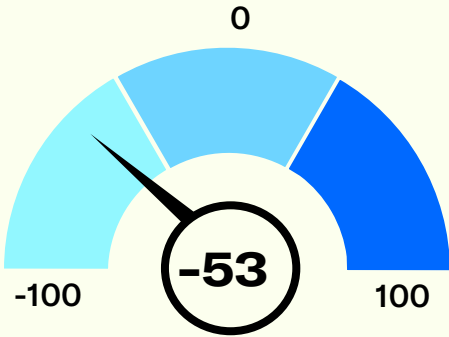
(% “Agree” or “Strongly Agree”)



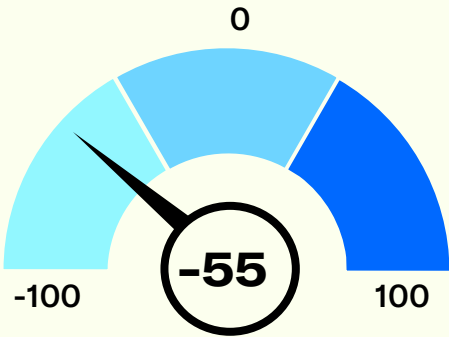
Likelihood to Recommend Bozeman as...



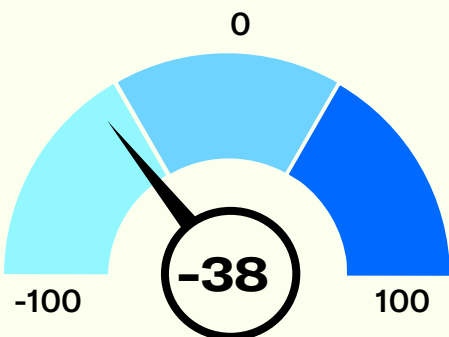
A Leisure Destination



For a Sporting Event



For a Business Meeting or Event

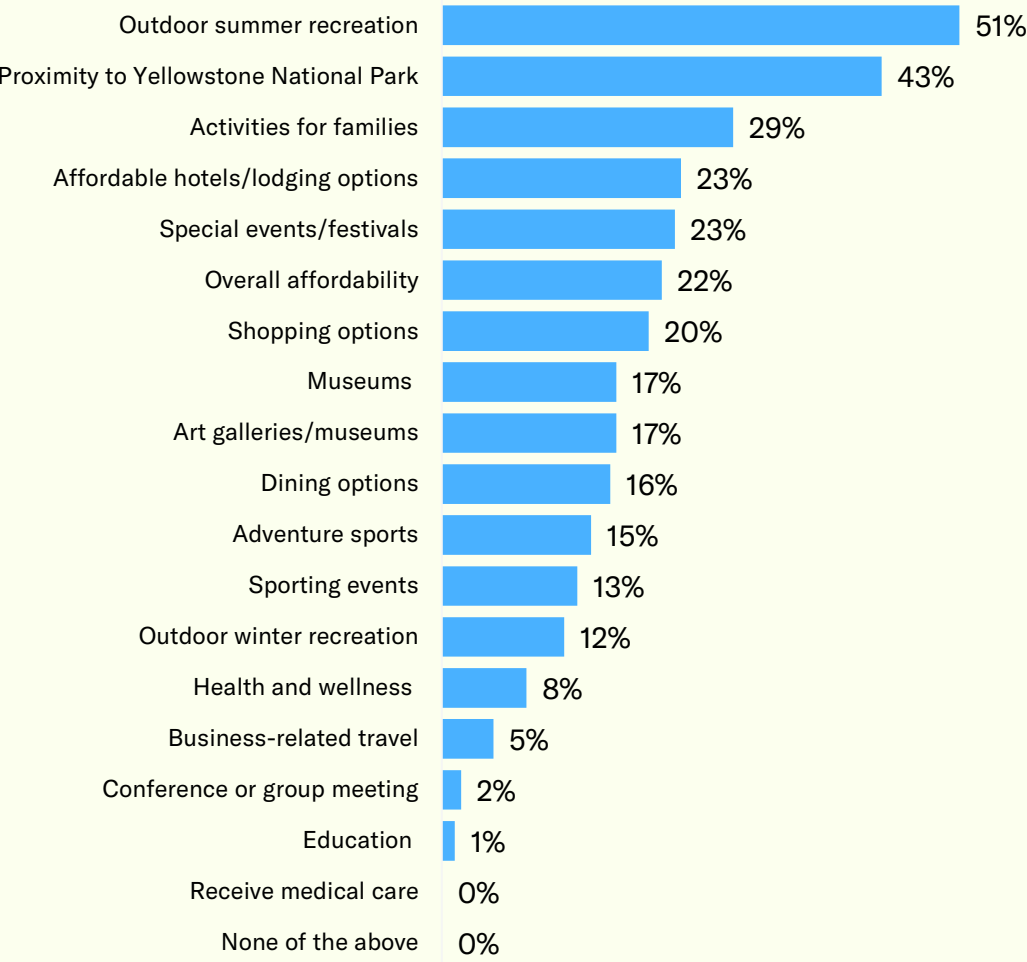


For a Special Event

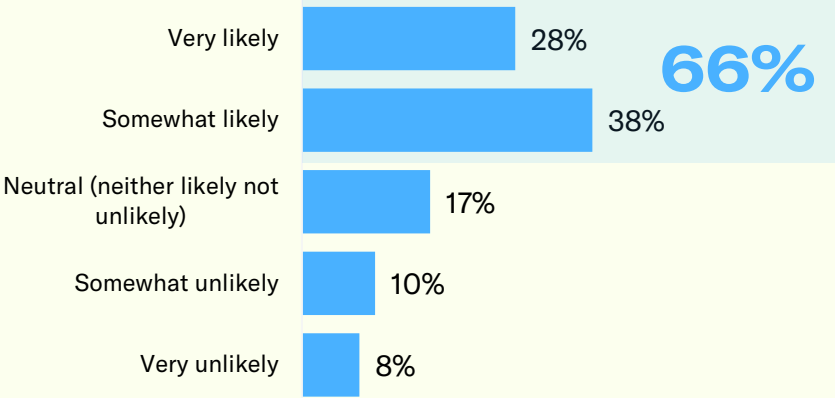
Future Bozeman Visitation

Eastern Washington
Residents

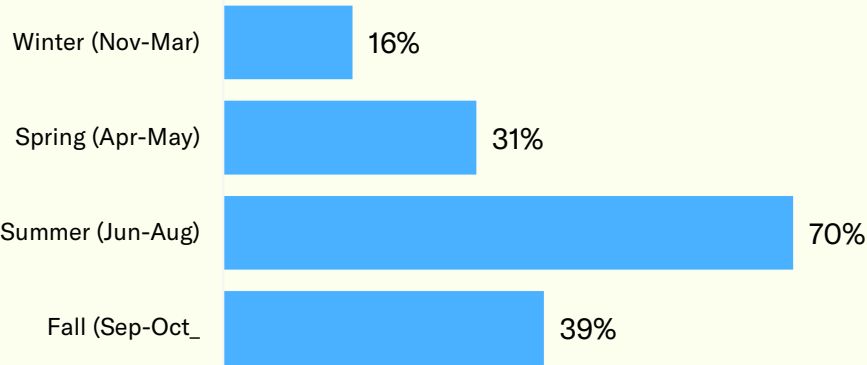
Reasons Likely to Visit in the Next Two Years



Likelihood to Visit – Next 2 Years



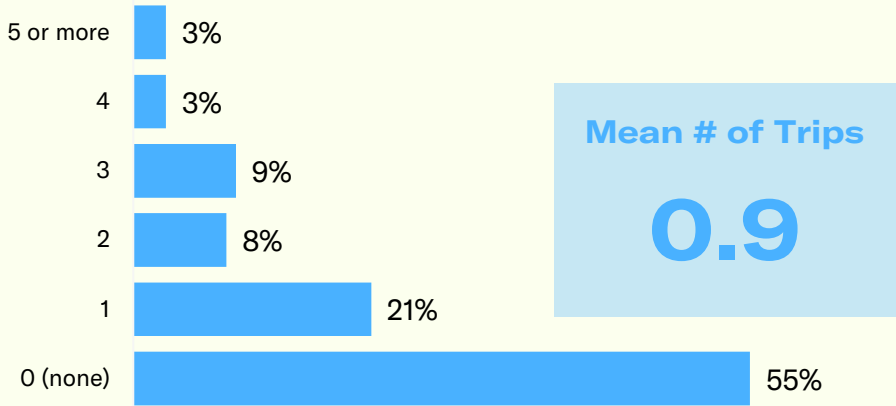
Likeliest Month of Visit



General Montana Travel

Eastern Washington
Residents

Number of Overnight Trips within Montana *Past 12 Months*



Average Number of Leisure Trips *Past 12 Months*

2.9
trips

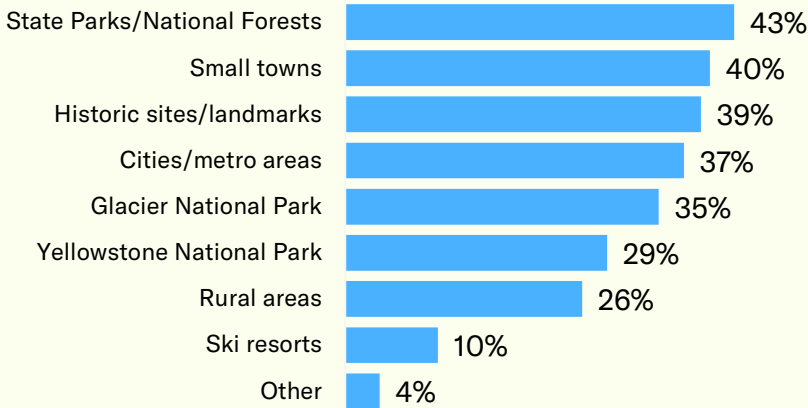


Average Number of Bozeman Visits *As an adult*

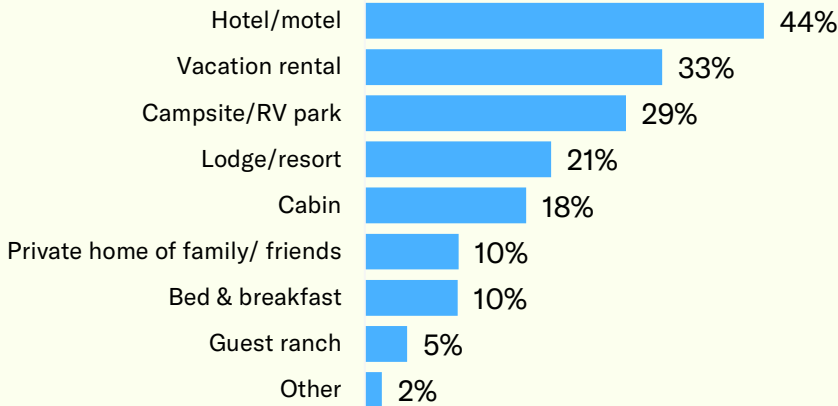
4.3
trips



Typical Montana Overnight Destination Types



Typical Montana Lodging Types

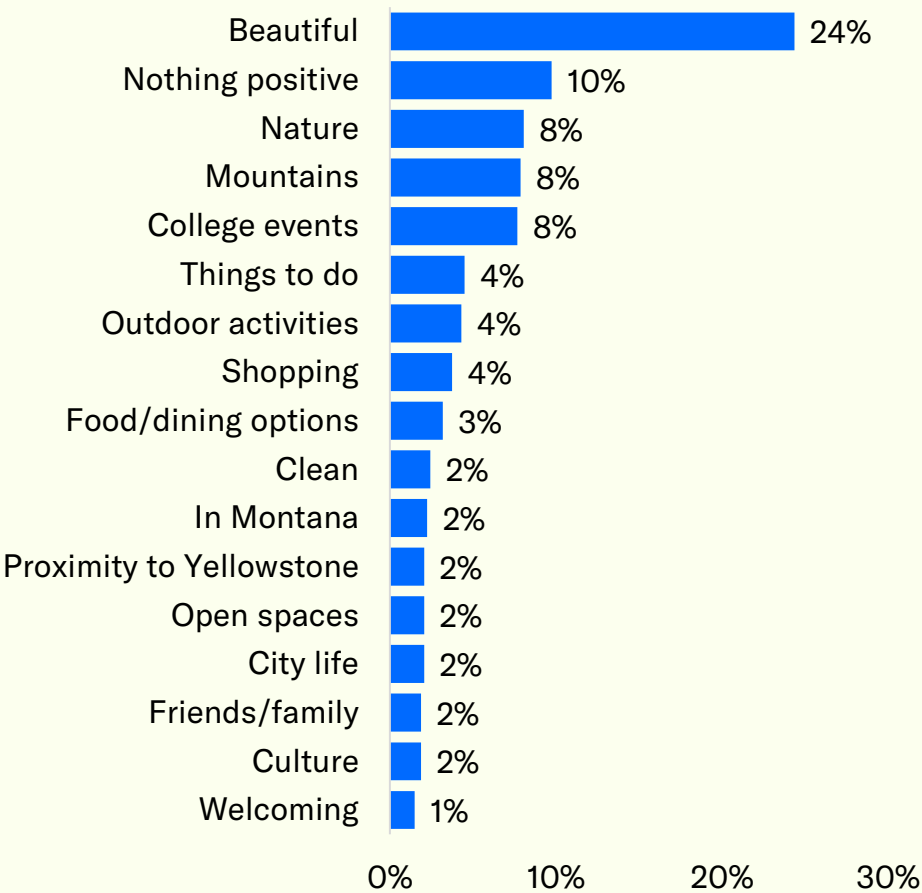


Bozeman Perceptions

The natural beauty around the city is the topmost positive perception of Bozeman for regional residents.

Among regional residents, the most top-of-mind positive perceptions of Bozeman center around the beauty of the surrounding area (24%), while 10 percent said nothing positive comes to mind. Those who have never been to Bozeman before were most likely to have nothing positive to say (20%).

Bozeman Positive Aspects - Unaided



Bozeman Positive Aspects – Unaided by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Beautiful	24%	24%	28%	19%	21%
Nothing positive	10%	8%	7%	20%	11%
Nature	8%	5%	10%	16%	4%
Mountains	8%	7%	10%	8%	7%
College events	8%	8%	11%	2%	13%
Things to do	4%	6%	4%	0%	7%
Outdoor activities	4%	5%	4%	2%	5%
Shopping	4%	6%	1%	0%	7%
Food/dining options	3%	4%	2%	1%	5%
Clean	2%	3%	3%	1%	2%
In Montana	2%	2%	3%	3%	1%
Proximity to Yellowstone	2%	2%	1%	2%	2%
Open spaces	2%	1%	2%	5%	0%
City life	2%	3%	1%	2%	1%
Friends/family	2%	3%	1%	0%	3%
Culture	2%	3%	1%	0%	3%
Welcoming	1%	2%	1%	0%	1%
Base	534	302	141	91	234

Question: When you think of Bozeman, what is the first positive thing that comes to mind?

Please be as specific as possible.

Base: Total respondents.

When you think of Bozeman, what is the first positive thing that comes to mind?

When I think of Bozeman, the first positive thing that comes to mind is its stunning natural beauty and access to outdoor activities.

-Recent visitor from Idaho

It is a close-by trip to see other local shops and a more "hip" town in Montana.

-Recent visitor from Montana

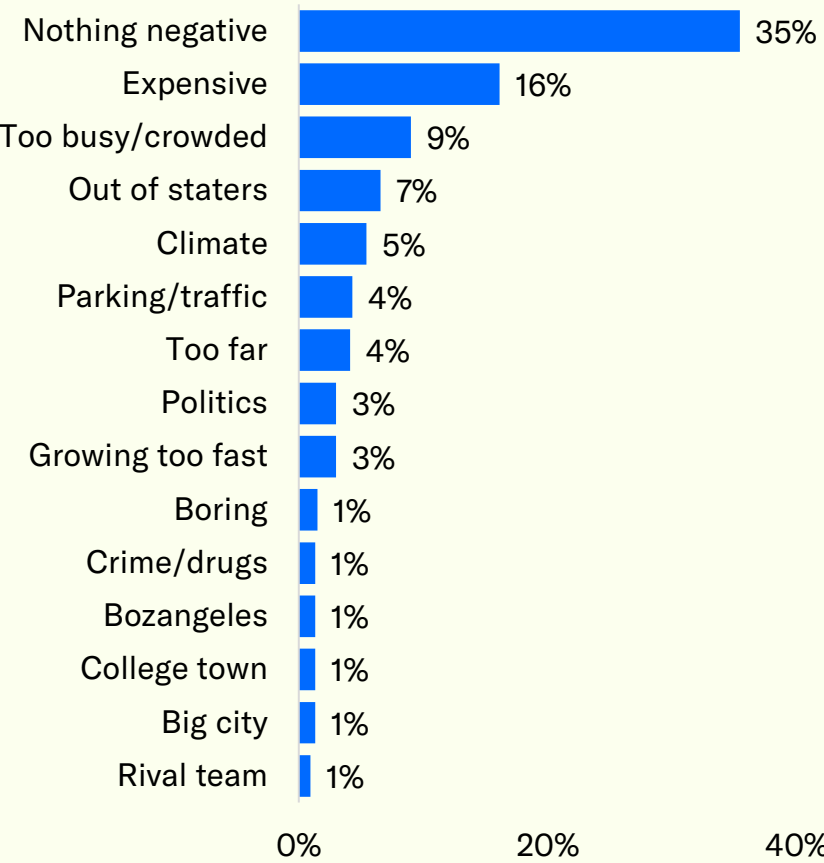
Its proximity to incredible outdoor recreational opportunities, particularly Yellowstone National Park. The scenic beauty and access to activities like hiking, skiing, and wildlife viewing make Bozeman a standout destination for nature enthusiasts.

-Recent visitor from Idaho

Recent visitors and Montanans are the most likely to say that the expensiveness of the city is the first negative thing that comes to mind.

For negative perceptions of Bozeman, at the largest share of regional residents, over a third (35%) said nothing negative comes to mind. This was highest among those who have never been (59%), likely reflecting their lack of familiarity with Bozeman. On the other hand, Montanans (16%) were the least likely to say nothing negative, but were the most likely (29%) to say that Bozeman is too expensive. Overall, the most negative aspects of Bozeman cited were around high costs (16%) and crowding (9%).

Bozeman Negative Aspects - Unaided



Bozeman Negative Aspects – Unaided by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Nothing negative	35%	28%	36%	59%	16%
Expensive	16%	20%	13%	9%	29%
Too busy/crowded	9%	12%	6%	4%	14%
Out of staters	7%	9%	6%	0%	13%
Climate	5%	3%	7%	10%	1%
Parking/traffic	4%	6%	2%	1%	7%
Too far	4%	2%	8%	7%	1%
Politics	3%	3%	4%	0%	3%
Growing too fast	3%	4%	1%	1%	3%
Boring	1%	1%	2%	2%	0%
Crime/drugs	1%	2%	1%	0%	1%
Bozangeles	1%	1%	2%	1%	2%
College town	1%	2%	1%	0%	3%
Big city	1%	1%	2%	2%	1%
Rival team	1%	1%	1%	0%	1%
Base	534	302	141	91	234

Question: And what is the first negative thing that comes to mind? Please be as specific as possible.

Base: Total respondents.

And what is the first negative thing that comes to mind?

“
The first negative thing that comes to mind about Bozeman is the rising cost of living. Housing prices and the overall cost of living have been increasing significantly, which can be a challenge for both residents and those looking to move to the area.
”
-Recent visitor from Idaho

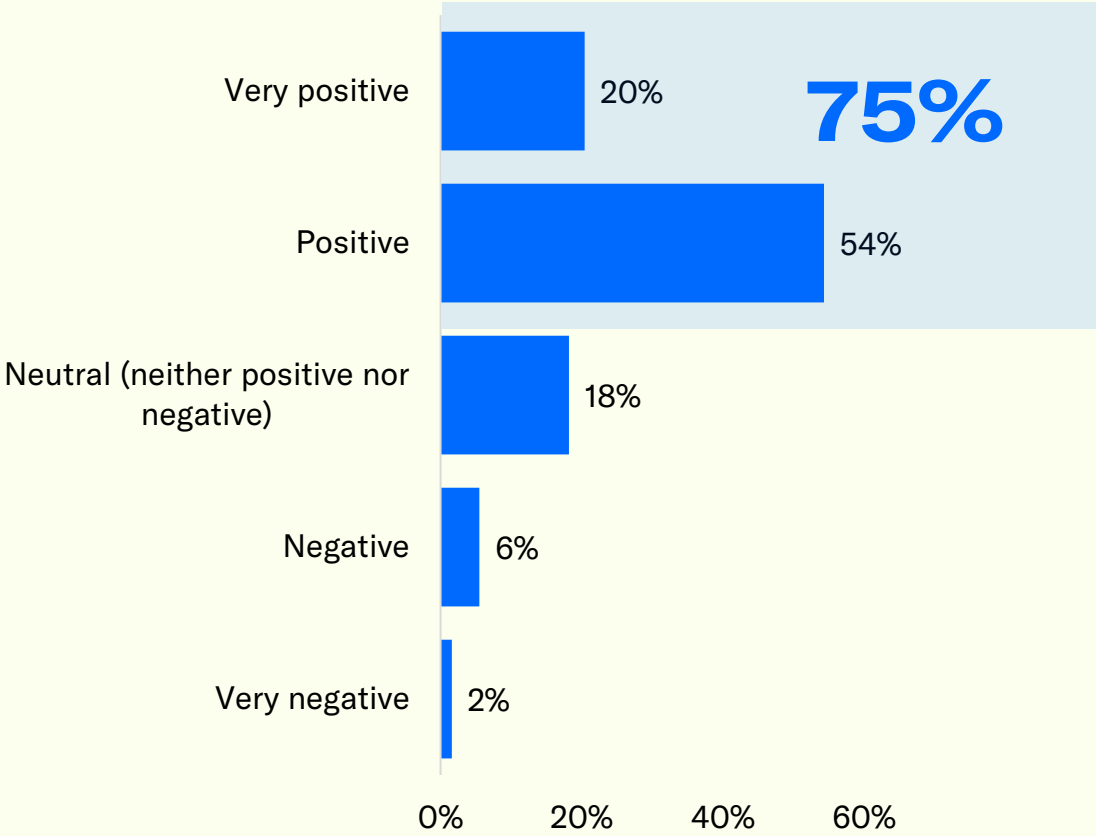
“
Too much outside money has made it unaffordable for the average Montana citizen.
”
-Lapsed visitor from Montana

“
Overcrowded due to the influx of Californians, Washington and Oregon people during the COVID-19 pandemic.
”
-Recent visitor from Montana

Regional residents overall feel positively about Bozeman as a place to visit, though Montanans are more lukewarm.

Overall, three-fourths (75%) of regional residents feel positive or very positive about Bozeman as a place to visit. Recent visitors (27%) were much more likely than lapsed visitors (14%) or those who have never been (8%) to say that they feel very positive about Bozeman. Reflecting the general trend throughout this study, those who have never been were much more likely to be neutral (36%). Notably, Montanans (12%) are more likely than overall regional residents (7%) to say they feel negative or very negative about Bozeman.

Positivity Levels



Positivity Levels by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Top 2 Box	75%	78%	76%	60%	69%
Very positive	20%	27%	14%	8%	18%
Positive	54%	51%	62%	52%	52%
Neutral (neither positive nor negative)	18%	14%	17%	36%	19%
Negative	6%	7%	4%	4%	9%
Very negative	2%	1%	3%	0%	3%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

Question: Overall, how do you feel about Bozeman, Montana, as a place to visit?

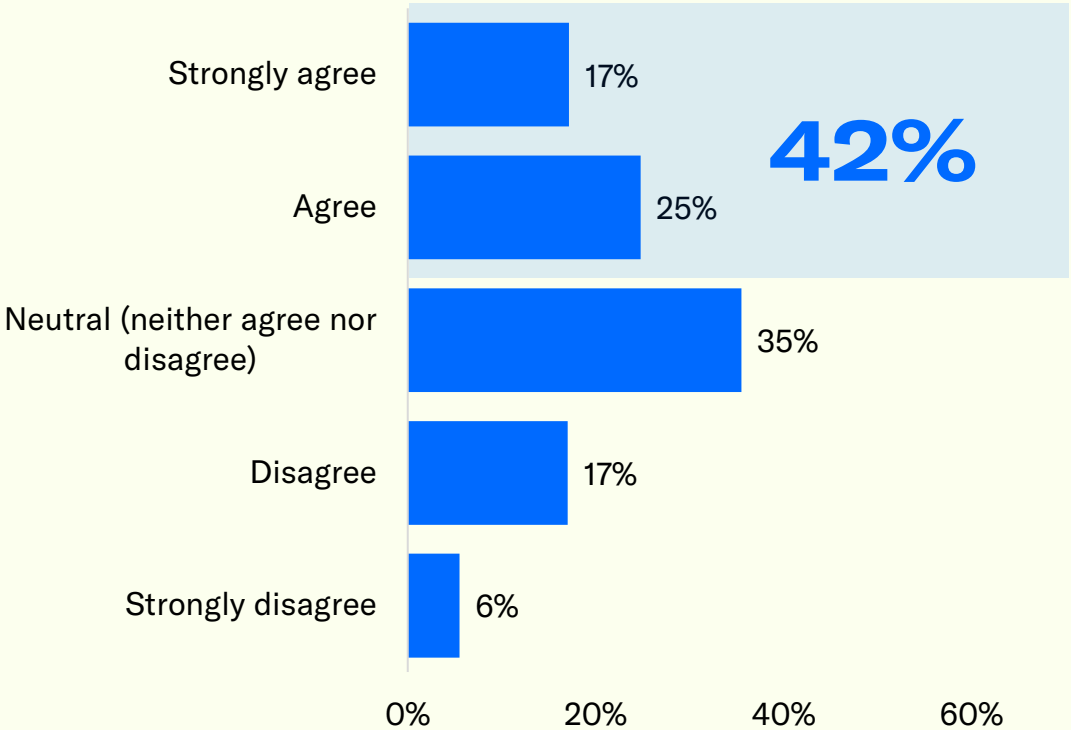
Base: Total respondents.

Most recent visitors and Montanans feel Bozeman is losing its “Montana authenticity”.

Over four in ten (42%) regional residents agree that Bozeman’s “Montana authenticity” is being lost. This sentiment is strongest among Montanans (64%) and recent visitors (52%), while the majority of those who have never been are neutral (68%). It should be noted that, despite this perception around Montana authenticity, regional residents nevertheless still hold a positive view of Bozeman as a place to visit, as evidenced in the previous slide.

“Bozeman’s ‘Montana authenticity’ is being lost.”

Agreement Levels



Agreement Levels by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Top 2 Box	42%	52%	37%	17%	64%
Strongly agree	17%	23%	11%	5%	29%
Agree	25%	28%	25%	12%	35%
Neutral (neither agree nor disagree)	35%	25%	38%	68%	21%
Disagree	17%	18%	20%	9%	10%
Strongly disagree	6%	5%	6%	6%	6%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

Question: Using the scale below, how much do you agree with the following statements:
Bozeman’s “Montana authenticity” is being lost.

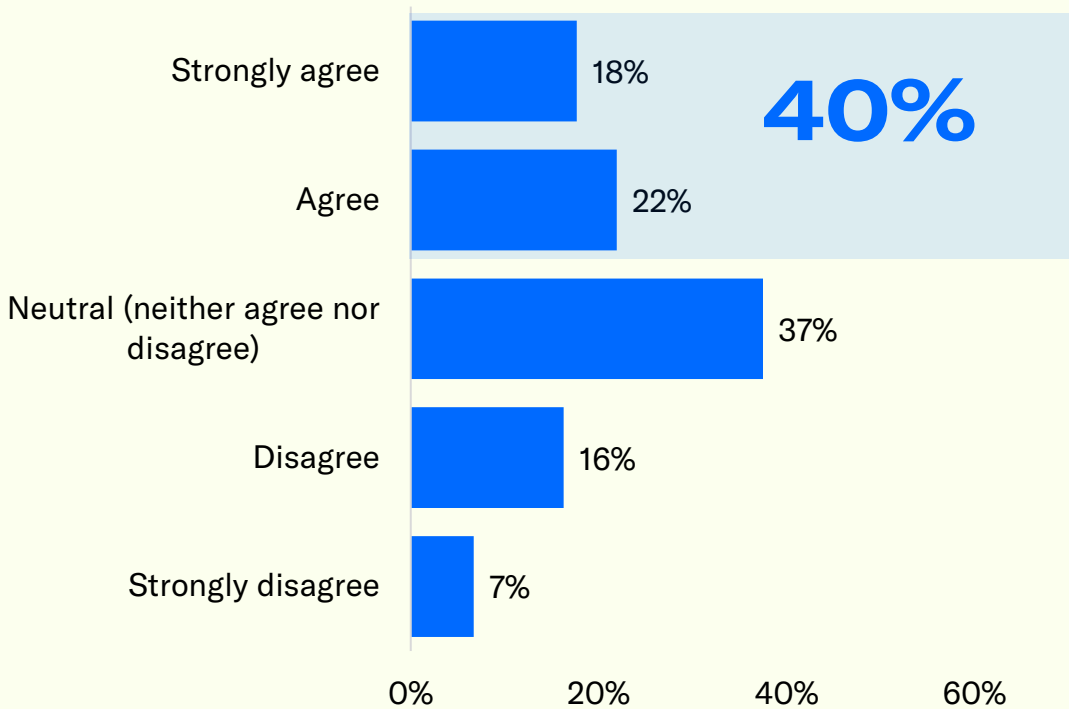
Base: Total respondents.

Agreement over the nickname “Boze Angeles” echoes perceptions around Bozeman’s loss of Montana authenticity.

Four in ten (40%) regional residents also agree that “Boze Angeles” is an apt nickname for Bozeman, closely mirroring sentiments around the city’s loss of its Montana authenticity. Again, the majority of recent visitors (53%) and Montanans (53%) agree, while those who have never been are most inclined to be neutral (60%). Lapsed visitors (33%) are much more likely to disagree or strongly disagree about the monicker compared to total respondents (23%).

“Boze Angeles’ is an apt nickname for the city.”

Agreement Levels



Agreement Levels by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Top 2 Box	40%	53%	24%	19%	53%
Strongly agree	18%	25%	9%	6%	29%
Agree	22%	28%	15%	13%	24%
Neutral (neither agree nor disagree)	37%	28%	43%	60%	30%
Disagree	16%	13%	24%	16%	11%
Strongly disagree	7%	7%	8%	5%	6%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

Question: Using the scale below, how much do you agree with the following statements:

“Boze Angeles” is an apt nickname for the city.

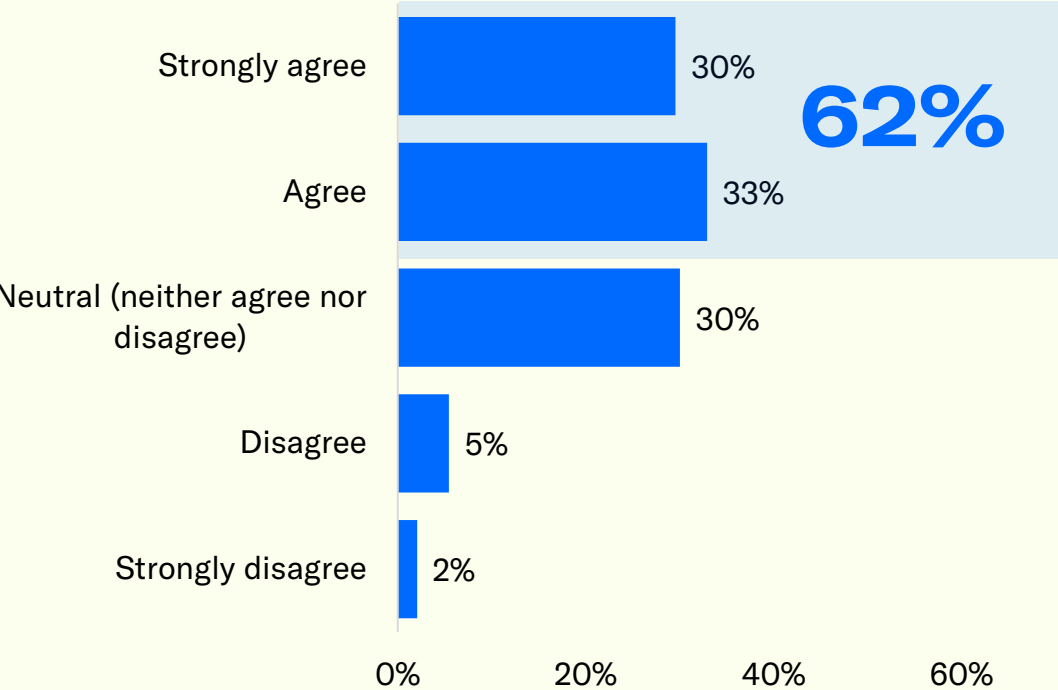
Base: Total respondents.

Six in ten regional residents feel too many outsiders are moving to Bozeman.

Nearly two-thirds (62%) of regional residents agree that too many people are moving to Bozeman from outside of the region. Following the established trends seen in the key segments, a large majority of Montanans (81%) and recent visitors (70%) agree with this sentiment, while those who have never been are more likely to be neutral (50%). These agreement levels around Bozeman’s population shifts are higher than those around perceived changes to the city’s culture, indicating that while there is a perception of more outsiders coming into the area, this does not necessarily mean residents feel transplants are impacting the culture of Bozeman.

“There are too many people moving to Bozeman from outside of the region.”

Agreement Levels



Agreement Levels by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Top 2 Box	62%	70%	60%	40%	81%
Strongly agree	30%	37%	25%	11%	49%
Agree	33%	33%	35%	29%	32%
Neutral (neither agree nor disagree)	30%	23%	34%	50%	15%
Disagree	5%	5%	5%	9%	3%
Strongly disagree	2%	2%	2%	1%	1%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

Question: Using the scale below, how much do you agree with the following statements:

There are too many people moving to Bozeman from outside of the region.

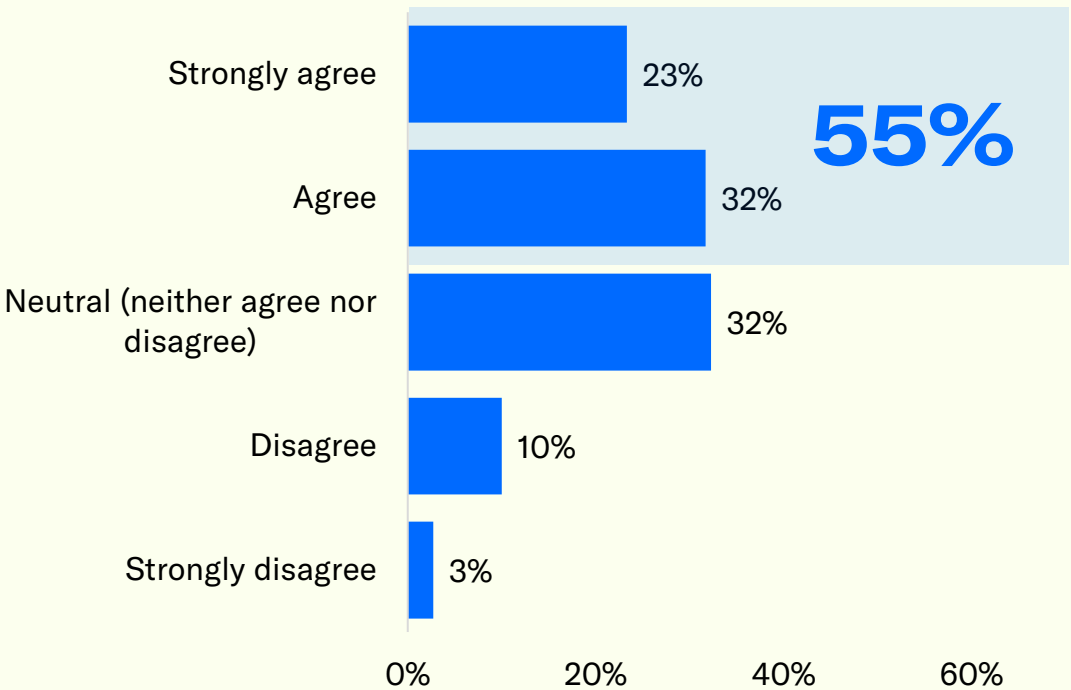
Base: Total respondents.

Views of Bozeman as being too expensive correlates to perceptions that it is mostly a destination for the wealthy.

More than half (55%) of regional residents agree that Bozeman is mostly a destination for “rich people”, with Montanans (77%) and recent visitors (62%) once again most likely to agree. These are also the two segments that are most likely to cite the expensiveness of Bozeman as the first negative thing about Bozeman that comes to mind.

“Bozeman is mostly a destination for ‘rich people’.”

Agreement Levels



Agreement Levels by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Top 2 Box	55%	62%	50%	37%	77%
Strongly agree	23%	29%	19%	9%	41%
Agree	32%	33%	31%	27%	35%
Neutral (neither agree nor disagree)	32%	28%	32%	48%	17%
Disagree	10%	7%	15%	13%	6%
Strongly disagree	3%	3%	3%	2%	1%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

Question: Using the scale below, how much do you agree with the following statements:

Bozeman is a mostly a destination for “rich people.”

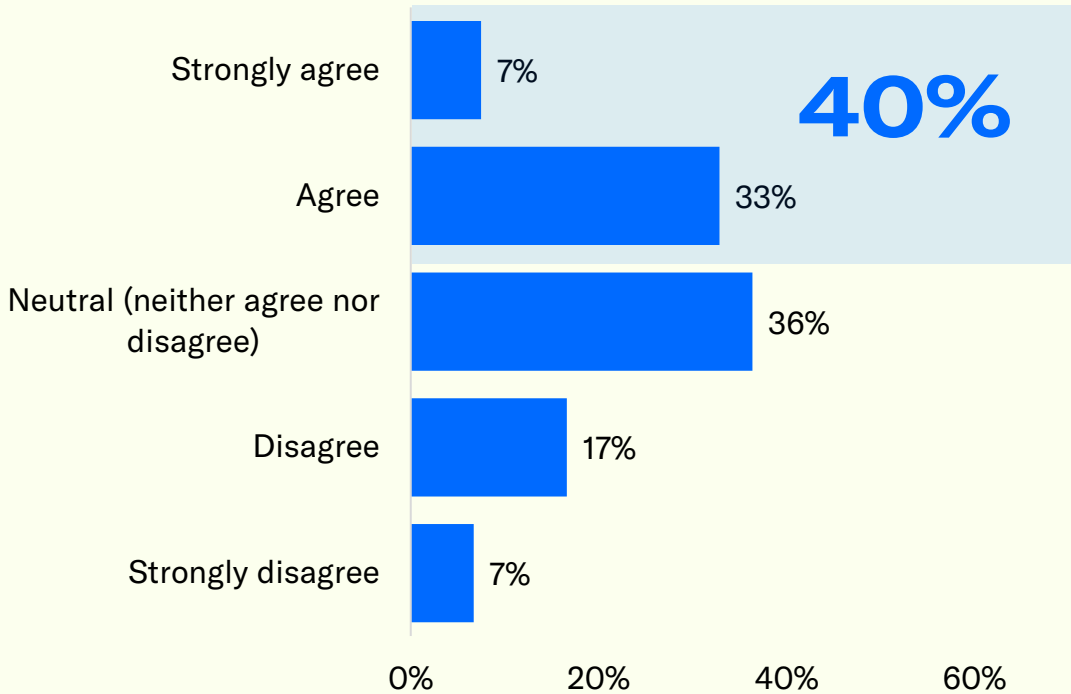
Base: Total respondents.

Only one in four Montanans agree that Bozeman is a good value destination for visitors.

Reiterating the perception that Bozeman is mostly a destination for rich people, only four in ten (40%) feel that visitors to Bozeman can have a travel experience that is good value for money. In particular, only 25 percent of Montanans agree. These in-state residents are also significantly more likely to disagree or strongly disagree (39%) compared to total respondents (23%).

“On an overnight trip to Bozeman, visitors can have a travel experience that is good value for money.”

Agreement Levels



Agreement Levels by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Top 2 Box	40%	41%	40%	39%	25%
Strongly agree	7%	10%	3%	5%	2%
Agree	33%	31%	37%	34%	23%
Neutral (neither agree nor disagree)	36%	30%	39%	53%	36%
Disagree	17%	20%	15%	7%	26%
Strongly disagree	7%	8%	6%	1%	13%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

Question: Using the scale below, how much do you agree with the following statements:

On an overnight trip to Bozeman, visitors can have a travel experience that is good value for money.

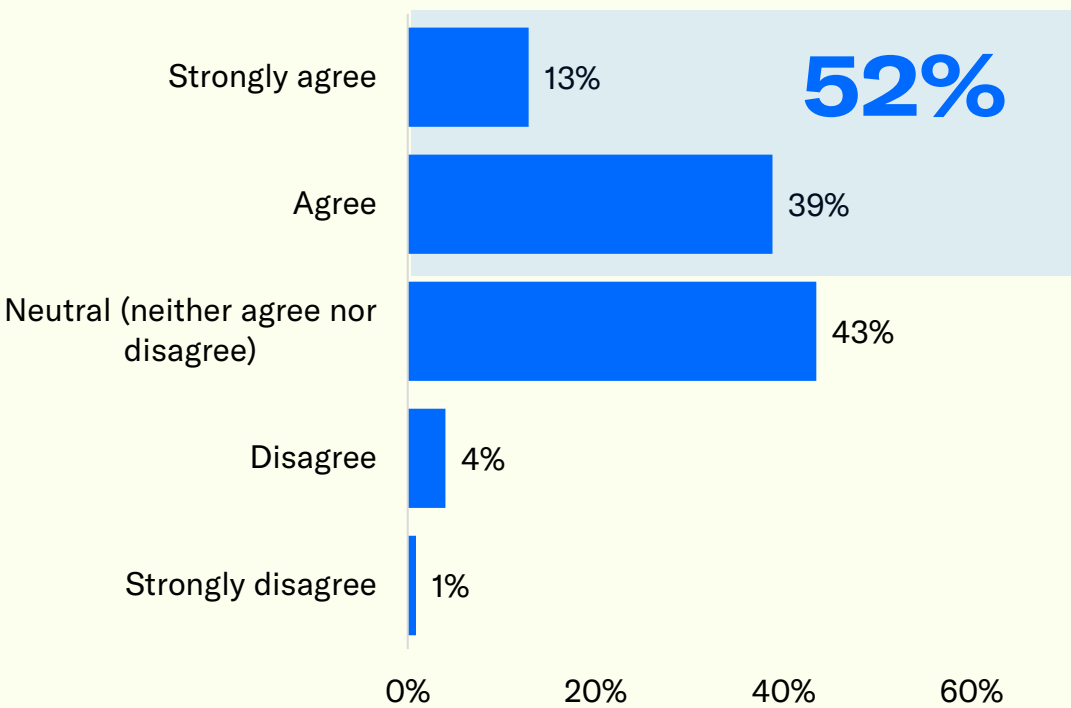
Base: Total respondents.

Most regional residents agree that Bozeman should invest more in better facilities for the community and visitors.

52 percent agree or strongly agree with this, signaling a perception that the city needs an upgrade to its facilities for the benefit of Bozeman residents as well as visitors. Notably, agreement levels were highest among recent visitors (60%), followed by Montanans (57%). The majority of those who have never been (62%) were neutral. Disagreement is low amongst all segments.

“Bozeman should invest more in better facilities for the community and visitors.”

Agreement Levels



Agreement Levels by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Top 2 Box	52%	60%	48%	30%	57%
Strongly agree	13%	18%	7%	3%	18%
Agree	39%	41%	41%	27%	39%
Neutral (neither agree nor disagree)	43%	36%	49%	62%	40%
Disagree	4%	3%	3%	8%	2%
Strongly disagree	1%	1%	1%	0%	0%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

Question: Using the scale below, how much do you agree with the following statements:
Bozeman should invest more in better facilities for the community and visitors.

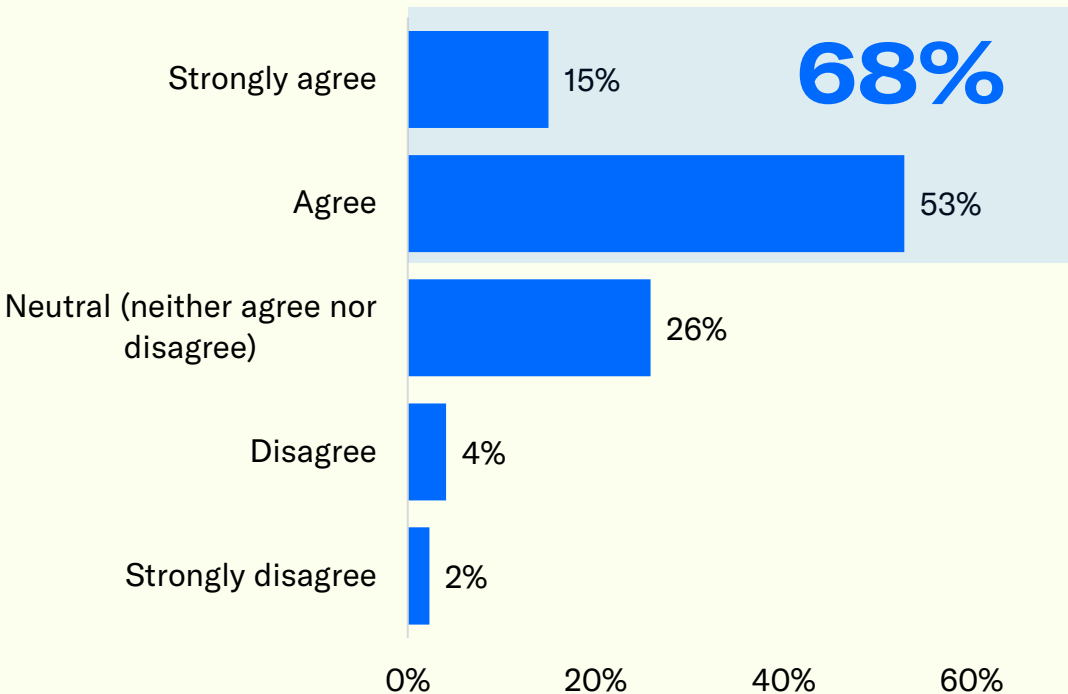
Base: Total respondents.

Bozeman’s location within the region serves well as a hub for adventures in the eyes of most regional residents.

At 68 percent, the majority of regional residents agree that Bozeman is a great home-base for regional adventures. While those who have never been predictably have the lowest agreement levels (53%), across the other key segments agreement levels are high, particularly for recent (71%) and lapsed (71%) visitors.

“Bozeman is a great home-base for adventures in the region.”

Agreement Levels



Agreement Levels by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Top 2 Box	68%	71%	71%	53%	64%
Strongly agree	15%	17%	15%	7%	13%
Agree	53%	53%	56%	46%	51%
Neutral (neither agree nor disagree)	26%	21%	24%	46%	27%
Disagree	4%	5%	3%	1%	5%
Strongly disagree	2%	3%	2%	0%	3%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

Question: Using the scale below, how much do you agree with the following statements:

Bozeman is a great home-base for adventures in the region.

Base: Total respondents.

Bozeman is perceived to deliver on outdoor offerings but is rated poorly for affordable lodging options.

Bozeman is rated highest for outdoor recreation (88%) and landscapes/natural features (85%), followed by year-round activities (73%), family activities (72%), and dining options (72%). While 68 percent rate Bozeman well for an authentic Montana ambience, this is higher among lapsed visitors (72%) and those who have never been (67%), and lowest for Montanans (52%). Fewer than half of total respondents rate Bozeman well for unique/diverse culture (49%), nightlife options (47%), and/or affordable lodging options (36%)

Bozeman Attribute Ratings


(% “Good” or “Very Good”)



Bozeman Attribute Ratings by Segment

(% “Good” or “Very Good”)

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Outdoor recreation	88%	89%	95%	72%	88%
Landscapes/natural features	85%	88%	91%	66%	85%
Activities to do year-round	73%	78%	76%	54%	81%
Activities for families	72%	76%	72%	60%	69%
Dining options	72%	81%	68%	49%	81%
Authentic Montana ambience	68%	66%	72%	67%	54%
Easily accessible	65%	66%	71%	47%	63%
Shopping options	62%	68%	59%	45%	69%
Entertainment	61%	66%	62%	40%	67%
Special events/festivals	60%	64%	56%	54%	65%
Museums	60%	69%	52%	40%	70%
Welcoming/inclusive culture	55%	54%	57%	54%	46%
Small-town charm	54%	53%	55%	56%	37%
Variety of sporting events	51%	55%	54%	29%	60%
Art galleries/museums	50%	57%	44%	37%	60%
Good weather	50%	51%	49%	49%	45%
Uniqueness/diverse culture	49%	53%	49%	35%	43%
Nightlife options	47%	53%	41%	33%	52%
Affordable lodging options	36%	34%	42%	33%	21%
Base	534	302	141	91	234

 = statistically significantly higher than overall responses

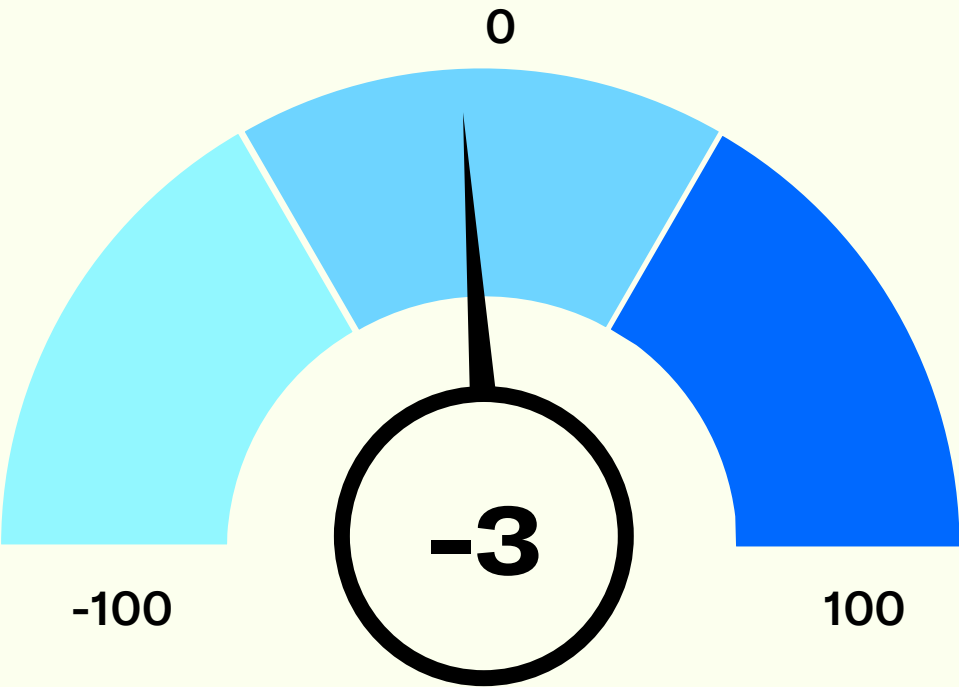
Question: How would you rate the following attributes of Bozeman?

Likelihood to recommend Bozeman for a leisure trip is highest among recent visitors, lowest among those who have never been.

Half of regional residents say they would recommend Bozeman as a place to visit for leisure (50% selected an 8 or higher on a 0- to 10-point scale). Subtracting the detractors (those who selected a 6 or lower) from the promoters (those who selected a 9 or 10), the likelihood to recommend score for Bozeman as a leisure destination is -3 for total respondents (with the lowest potential score being -100 and the highest 100). Recent visitors have the highest score (8), while those who have never been have the lowest (-33).

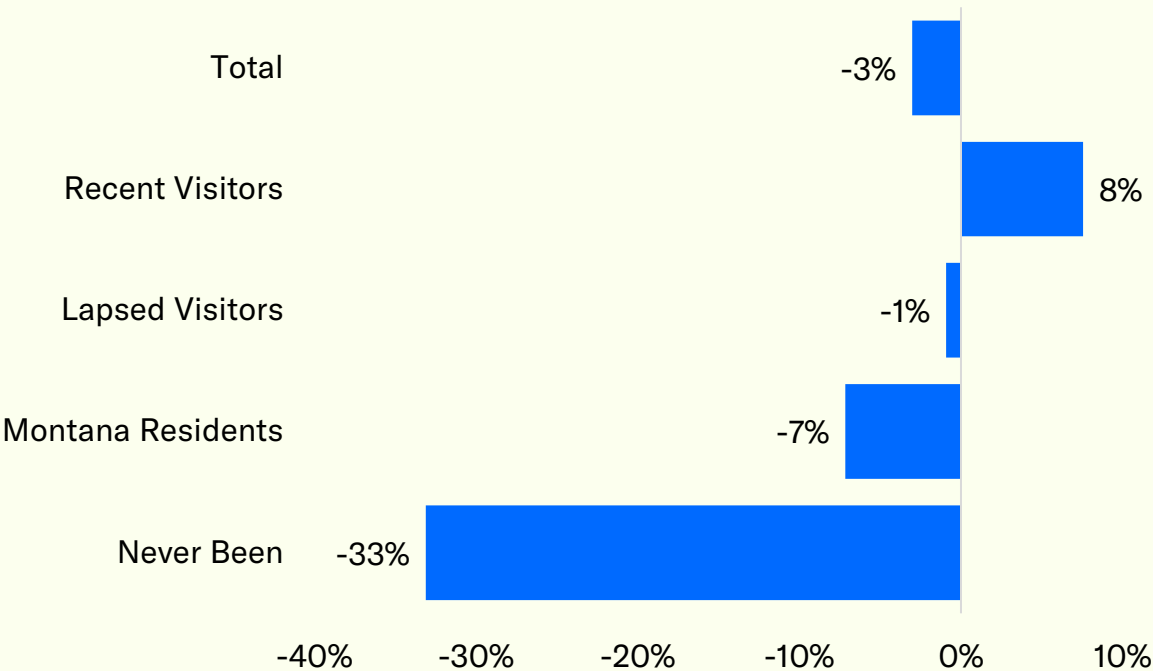
Likelihood to Recommend for a Leisure Visit

(0- to 10-point scale)



Likelihood to Recommend for a Leisure Visit by Segment

(0- to 10-point scale)



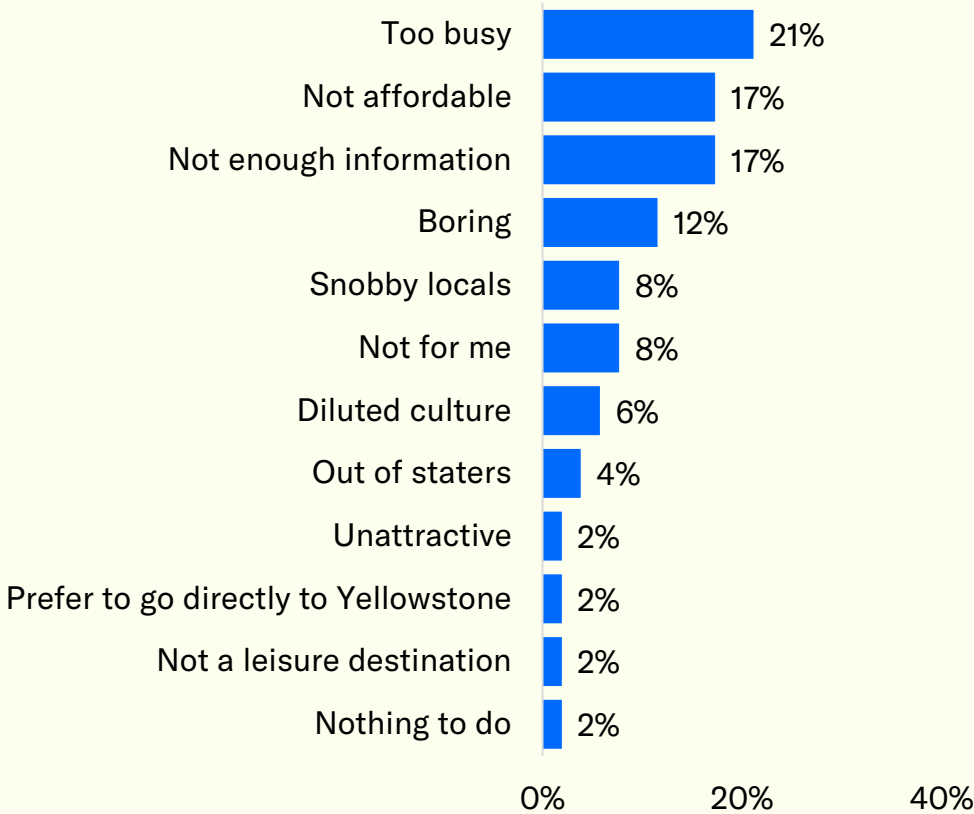
Question: How likely are you to recommend Bozeman as a place to visit for leisure?

Base: Total respondents.

The crowdedness of Bozeman is the most-cited reason regional residents are unlikely to recommend Bozeman for a leisure trip.

Among those who are unlikely to recommend Bozeman as a leisure destination, the most cited reason for this rating is that Bozeman is too busy (21%), followed by 17 percent who say that it is not affordable or there is not enough information about what to do. The busyness of Bozeman is most prevalently mentioned by Montanans (32%) and recent visitors (31%), while Montanans (24%) and lapsed visitors (22%) most frequently note cost as a deterrent.

Reason Unlikely to Recommend Bozeman for Leisure - Unaided



Reason Unlikely to Recommend Bozeman for Leisure – Unaided by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Too busy	21%	31%	17%	0%	32%
Not affordable	17%	19%	22%	0%	24%
Not enough information	17%	8%	11%	63%	6%
Boring	12%	8%	17%	13%	3%
Snobby locals	8%	15%	0%	0%	9%
Not for me	8%	4%	6%	25%	9%
Diluted culture	6%	8%	6%	0%	6%
Out of staters	4%	0%	11%	0%	6%
Unattractive	2%	4%	0%	0%	3%
Prefer to go directly to Yellowstone	2%	0%	6%	0%	0%
Not a leisure destination	2%	4%	0%	0%	0%
Nothing to do	2%	0%	6%	0%	3%
Base	52	26	18	8	34

Question: Why would you not recommend Bozeman as a place to visit for leisure?

Base: Respondents who said they are unlikely to recommend Bozeman as a place for leisure (i.e., scored a 4 or lower on a scale of 10 to 1).

Why would you not recommend Bozeman as a place to visit for leisure?

It's too stressful traffic everywhere and too many people. There are no places I have come upon that offer relaxing options.

-Recent visitor from Montana

Unless you're only taking a day trip, the lodging prices are ridiculously expensive.

-Lapsed visitor from Montana

Too many people and it doesn't showcase the authentic Montanan experience.

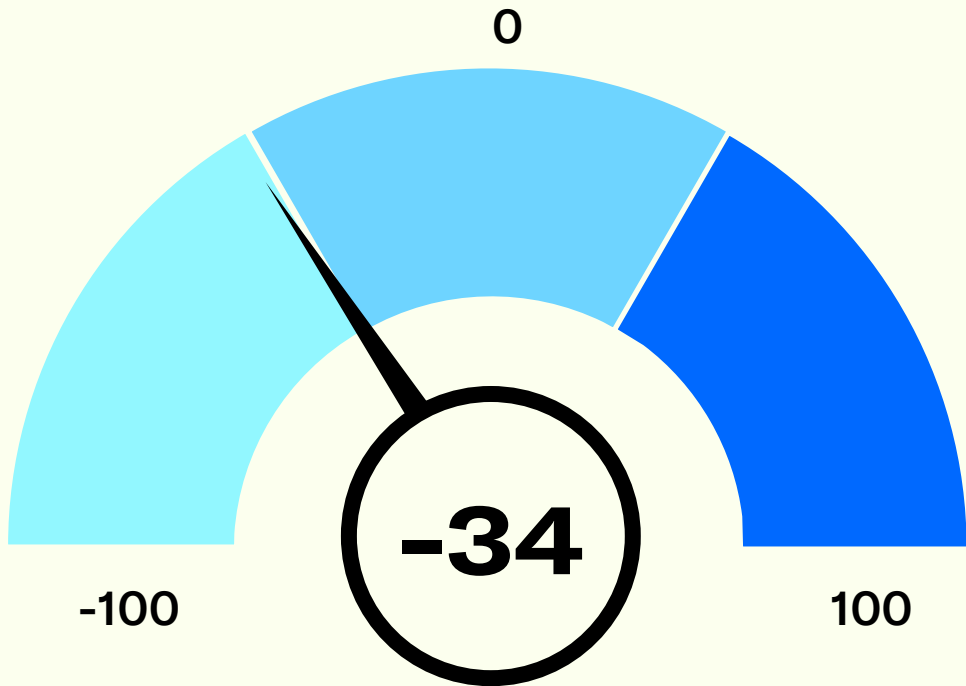
-Recent visitor from Montana

Though still negative, the likelihood to recommend Bozeman for sporting events is highest among recent visitors and Montanans.

One-third of regional residents would recommend Bozeman as a place to visit for a sporting event (32% selected an 8 or higher on a 0- to 10-point scale). Subtracting the detractors (those who selected a 6 or lower) from the promoters (those who selected a 9 or 10), the likelihood to recommend score for Bozeman to visit for a sporting event is -34 for total respondents (with the lowest potential score being -100 and the highest 100). The scores are negative across all key segments, with those who have never been (-69) and lapsed visitors (-29) scoring lowest.

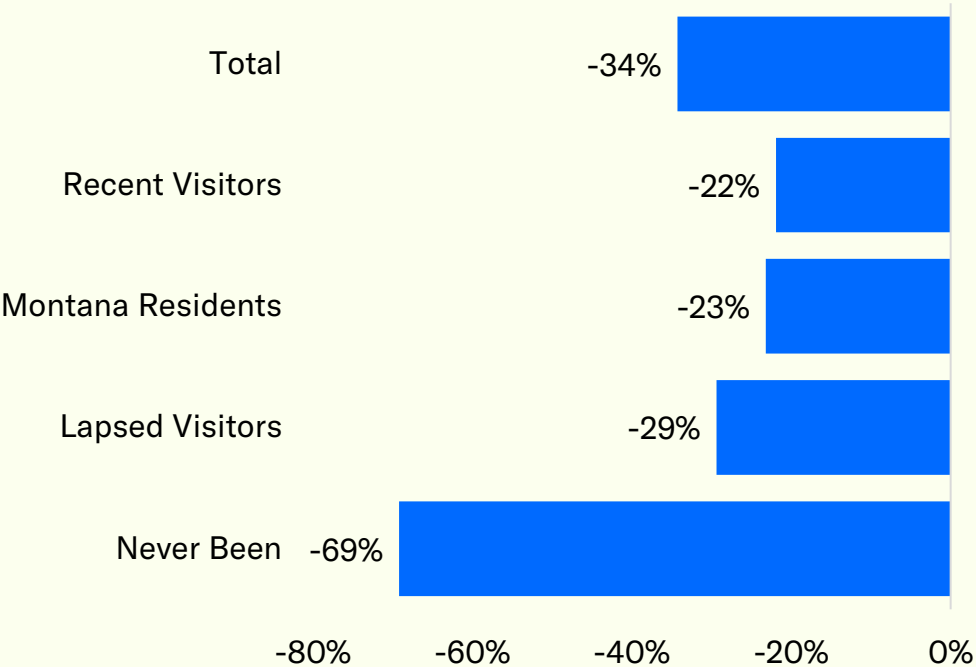
Likelihood to Recommend for a Sporting Event

(0- to 10-point scale)



Likelihood to Recommend for a Sporting Event by Segment

(0- to 10-point scale)



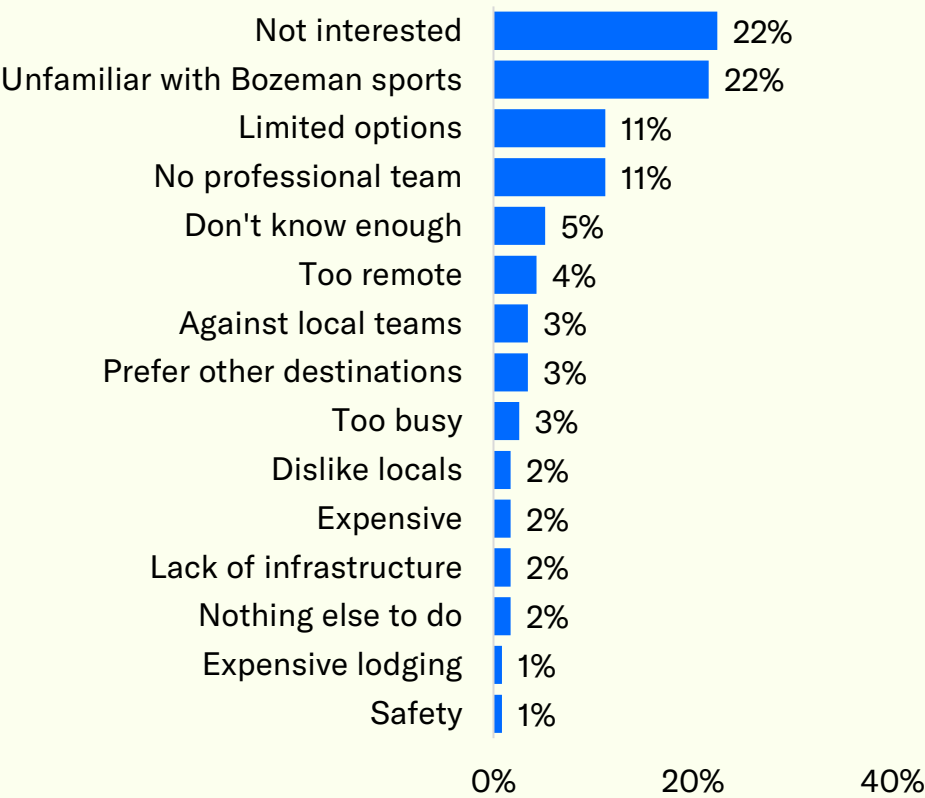
Question: How likely are you to recommend Bozeman as a place to visit for a sporting event?

Base: Total respondents.

Lack of interest in sports or not knowing what Bozeman offers are the top reasons residents are unlikely to recommend the city for sporting events.

A lack of interest or familiarity are the driving reasons for regional residents not to recommend Bozeman to visit for sporting events. Over one in five say they are not interested in sports (22%), while a similar share say they are unfamiliar with Bozeman’s sports offerings. The lack of options (11%) and/or professional teams (11%) are also cited relatively frequently.

Reason Unlikely to Recommend Bozeman for Sporting Events - Unaided



Reason Unlikely to Recommend Bozeman for Sporting Events – Unaided by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Not interested	22%	24%	17%	27%	25%
Unfamiliar with Bozeman sports	22%	16%	20%	35%	11%
Limited options	11%	6%	22%	4%	7%
No professional team	11%	16%	10%	4%	7%
Don't know enough	5%	0%	7%	4%	7%
Too remote	4%	2%	2%	12%	0%
Against local teams	3%	6%	2%	0%	9%
Prefer other destinations	3%	0%	7%	4%	5%
Too busy	3%	4%	2%	0%	7%
Dislike locals	2%	4%	0%	0%	2%
Expensive	2%	2%	2%	0%	2%
Lack of infrastructure	2%	2%	0%	4%	5%
Nothing else to do	2%	2%	0%	4%	2%
Expensive lodging	1%	2%	2%	0%	2%
Safety	1%	2%	0%	0%	0%
Base	116	49	41	26	44

Question: Why would you not recommend Bozeman as a place to visit for a sporting event?

Base: Respondents who said they are unlikely to recommend Bozeman as a place to visit for a sporting event (i.e., scored a 4 or lower on a scale of 10 to 1).

Why would you not recommend Bozeman as a place to visit for a sporting event?

I have no clue Bozeman has a lot of sporting events aside from MSU Cats Football. As a Griz fan, I wouldn't recommend attending a Cats game.

-Recent visitor from Montana

I don't know of them having any sports teams or events other than probably rodeo. Living in Cheyenne, sports wouldn't draw me to Bozeman.

-Never Been, from Wyoming

They don't have a great infrastructure for a large game and the types of sport presented in this city are limited.

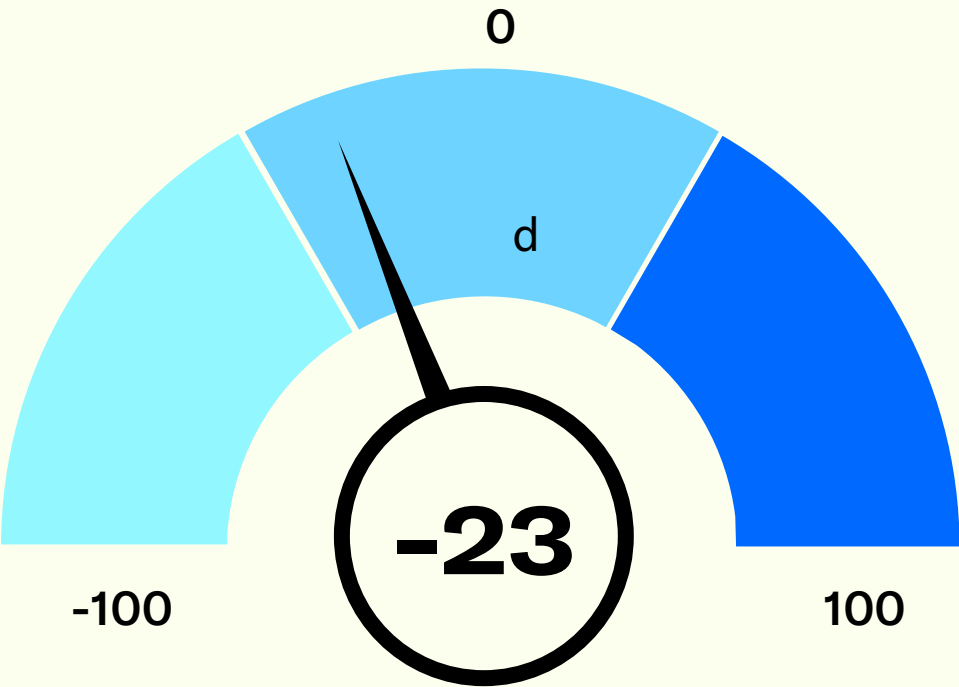
-Never Been, from Montana

Similarly, the likelihood to recommend Bozeman for special events is negative across segments, but recent visitors score highest.

Four in ten regional residents would recommend Bozeman as a place to visit for a special event (39% selected an 8 or higher on a 0- to 10-point scale). Subtracting the detractors (those who selected a 6 or lower) from the promoters (those who selected a 9 or 10), the likelihood to recommend score for Bozeman to visit for a special event is -29 for total respondents (with the lowest potential score being -100 and the highest 100). The scores are negative across key segments, recent visitors score highest (-9), while those who have never been (-60), followed distantly by Montanans (-20) score lowest.

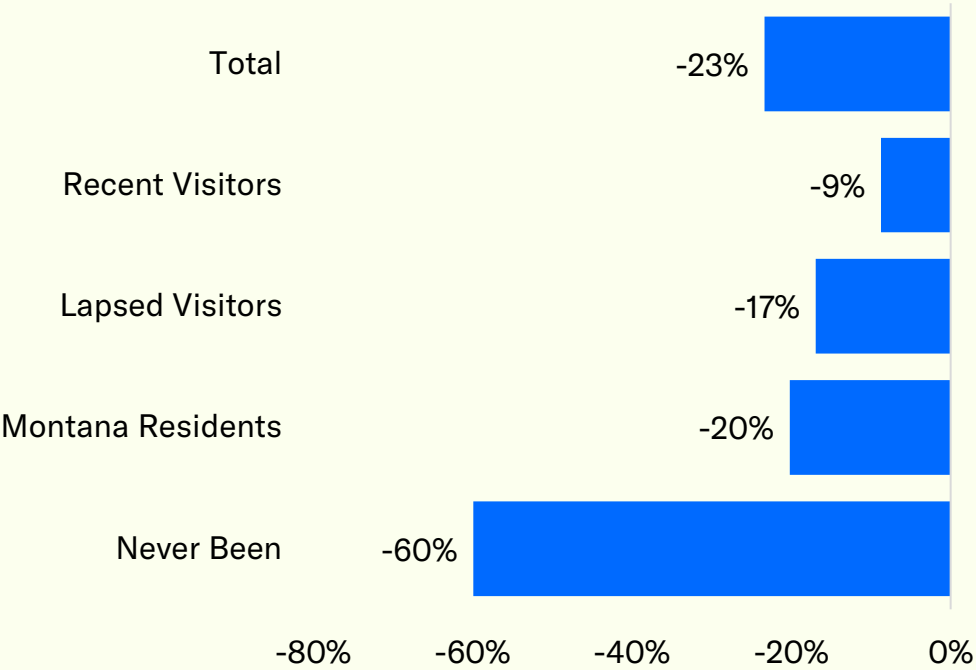
Likelihood to Recommend for a Special Event

(0- to 10-point scale)



Likelihood to Recommend for a Special Event by Segment

(0- to 10-point scale)



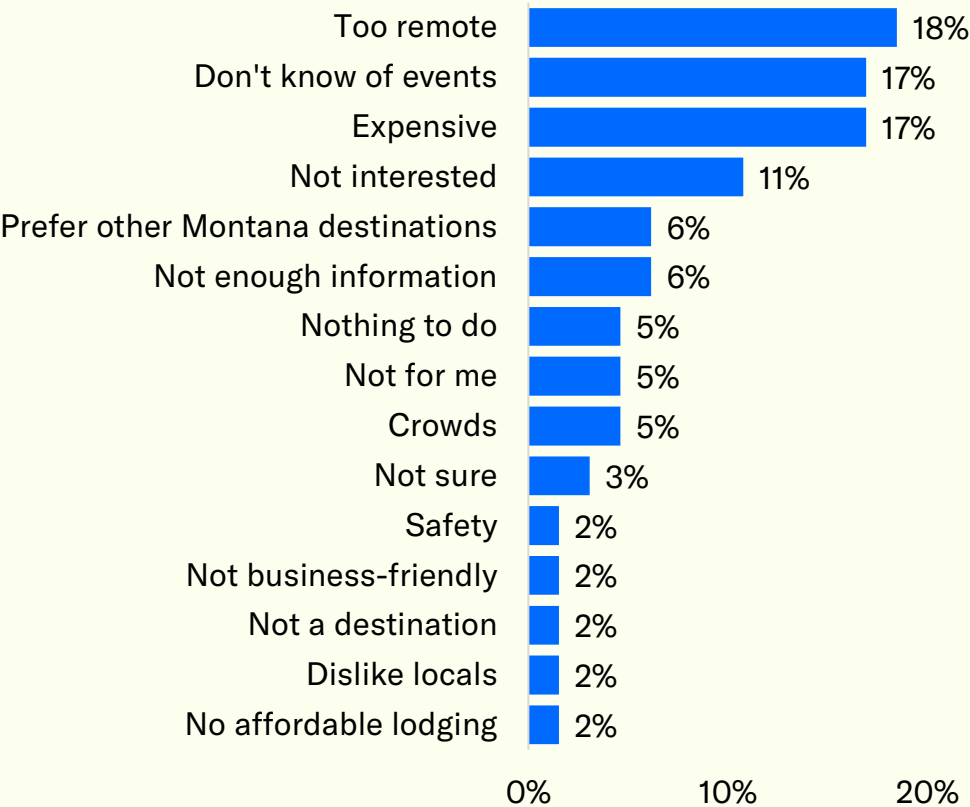
Question: How likely are you to recommend Bozeman as a place to visit for a special event?

Base: Total respondents.

The difficulty of accessing Bozeman was the top reason regional residents would not recommend the city for a special event.

Bozeman being too remote (18%) is the most-cited reason regional residents would not recommend it for special events, followed by a lack of familiarity with what events are available (17%) and the expensive of visiting Bozeman (17%). Notably, one in three Montanans who are unlikely recommend Bozeman for special events (34%) mentioned the expensiveness, which is the top write-in response for that segment.

Reason Unlikely to Recommend Bozeman for Special Events - Unaided



Reason Unlikely to Recommend Bozeman for Special Events – Unaided by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Too remote	18%	14%	19%	27%	14%
Don't know of events	17%	14%	27%	0%	14%
Expensive	17%	29%	12%	0%	34%
Not interested	11%	4%	12%	27%	3%
Prefer other Montana destinations	6%	0%	8%	18%	0%
Not enough information	6%	4%	4%	18%	3%
Nothing to do	5%	7%	4%	0%	7%
Not for me	5%	7%	4%	0%	10%
Crowds	5%	7%	4%	0%	7%
Not sure	3%	4%	4%	0%	0%
Safety	2%	4%	0%	0%	0%
Not business-friendly	2%	0%	0%	9%	0%
Not a destination	2%	4%	0%	0%	0%
Dislike locals	2%	4%	0%	0%	3%
No affordable lodging	2%	0%	4%	0%	3%
Base	65	28	26	11	29

Question: Why would you not recommend Bozeman as a place to visit for a special event?

Base: Respondents who said they are unlikely to recommend Bozeman as a place to visit for a special event (i.e., scored a 4 or lower on a scale of 10 to 1).

Why would you not recommend Bozeman as a place to visit for a special event?

“
If you don't have a hotel reservation, the options are not great and are expensive. The main road east and west through town is long and takes forever with the traffic.
”
-Lapsed visitor from Eastern Washington

“
I'm not sure what events there are and if they're any good.
”
-Lapsed visitor from Idaho

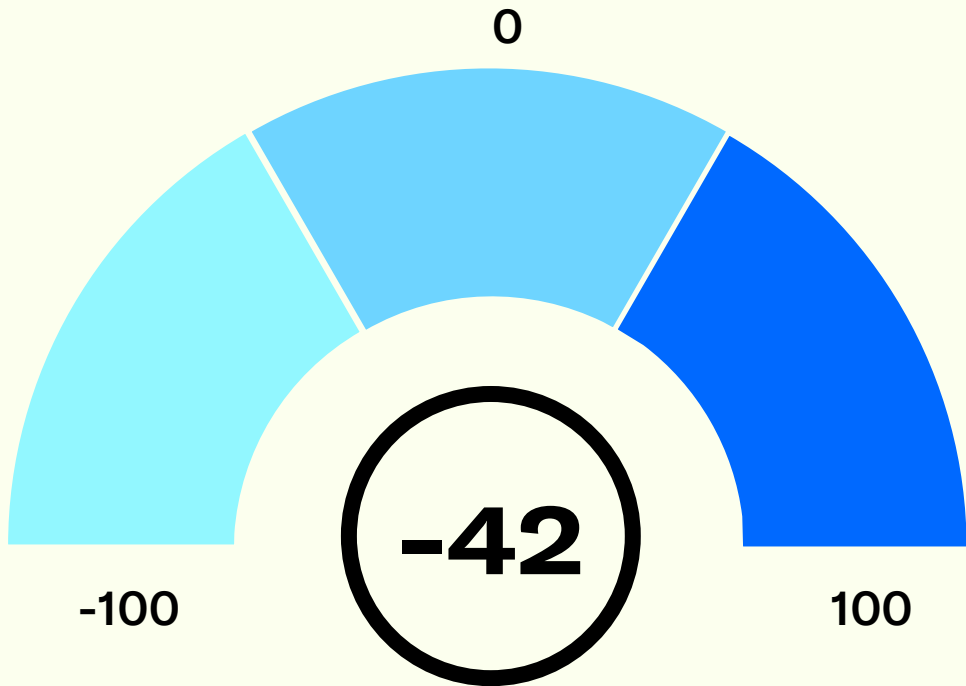
“
The cost of everything is so expensive that it would be difficult to do a lot of activities and not breaking the bank. A special event plus eating out and lodging, I'm not sure Bozeman feels fun enough to spend serious money on.
”
-Recent visitor from Montana

Bozeman scores lowest for likelihood to recommend for a business meeting event.

Over one in four regional residents would recommend Bozeman as a place to visit for a business meeting or event (28% selected an 8 or higher on a 0- to 10-point scale). Subtracting the detractors (those who selected a 6 or lower) from the promoters (those who selected a 9 or 10), the likelihood to recommend score for Bozeman to visit for a business meeting or event is -42 for total respondents (with the lowest potential score being -100 and the highest 100). The scores are negative across key segments, recent visitors score highest (-32), while those who have never been (-66), followed distantly by Montanans (-45) score lowest.

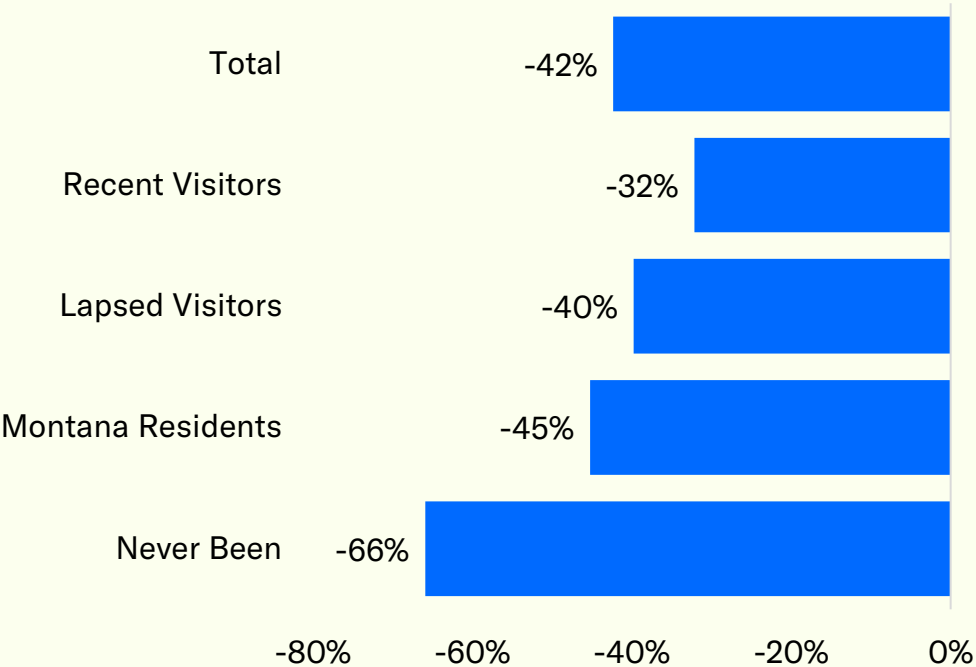
Likelihood to Recommend for a Business Event

(0- to 10-point scale)



Likelihood to Recommend for a Business Event by Segment

(0- to 10-point scale)



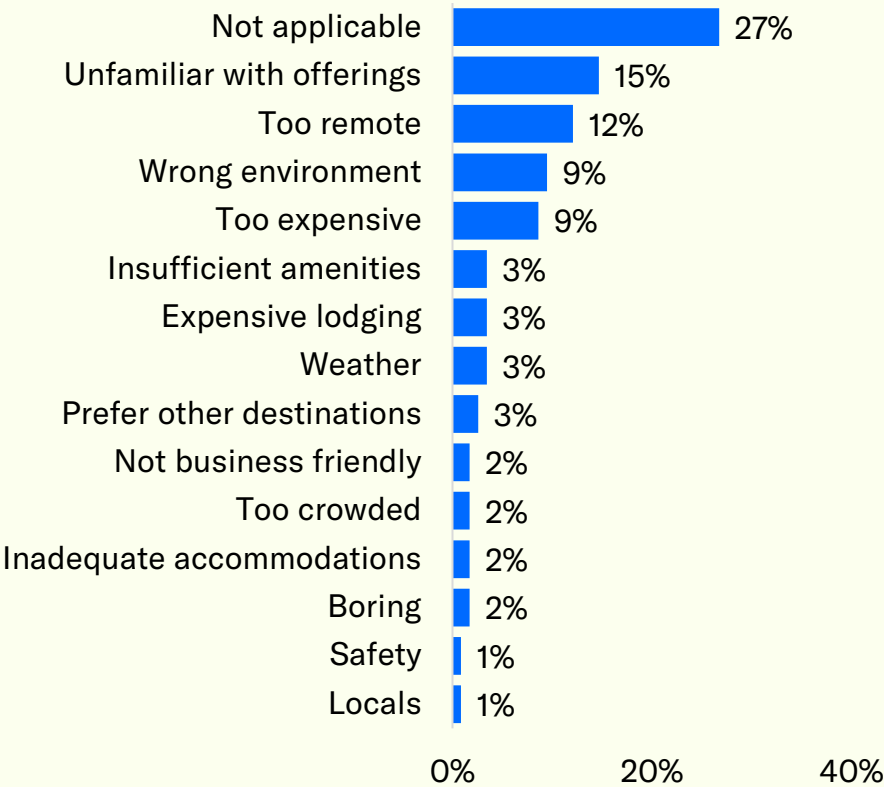
Question: How likely are you to recommend Bozeman as a place to attend a business meeting or event?

Base: Total respondents.

While the largest share say business meetings do not apply to them, this is followed by a lack of familiarity with business meeting options in Bozeman.

The main reason cited for why regional residents would not recommend Bozeman for a business meeting or event is that such an event does not apply to them personally (27%). This is followed by lack of familiarity with Bozeman’s offerings for business meetings and events (15%) and difficulty with accessing Bozeman for such an event (12%).

Reason Unlikely to Recommend Bozeman for Business Meetings - Unaided



Reason Unlikely to Recommend Bozeman for Business Meetings – Unaided by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Not applicable	27%	31%	21%	26%	31%
Unfamiliar with offerings	15%	6%	18%	30%	8%
Too remote	12%	7%	15%	17%	6%
Wrong environment	9%	6%	13%	13%	2%
Too expensive	9%	15%	5%	0%	20%
Insufficient amenities	3%	6%	3%	0%	2%
Expensive lodging	3%	4%	5%	0%	6%
Weather	3%	4%	5%	0%	4%
Prefer other destinations	3%	4%	3%	0%	4%
Not business friendly	2%	2%	3%	0%	2%
Too crowded	2%	4%	0%	0%	4%
Inadequate accommodations	2%	2%	3%	0%	0%
Boring	2%	0%	3%	4%	2%
Safety	1%	2%	0%	0%	0%
Locals	1%	0%	3%	0%	2%
Base	116	54	39	23	49

Question: Why would you not recommend Bozeman as a place to attend a business meeting or event?

Base: Respondents who said they are unlikely to recommend Bozeman as a place to attend a business meeting or event (i.e., scored a 4 or lower on a scale of 10 to 1).

Why would you not recommend Bozeman as a place to attend a business meeting or event?

“
Because it is far enough away from where I live that it may not make much sense for someone to travel there for just a meeting, but maybe if it was a large event that spanned multiple days then it would be worth it.
-Never Been, from Eastern Washington”

“
I do not make recommendations and am not aware of any locations for hosting a business meeting or event.
-Never Been, from Eastern Washington”

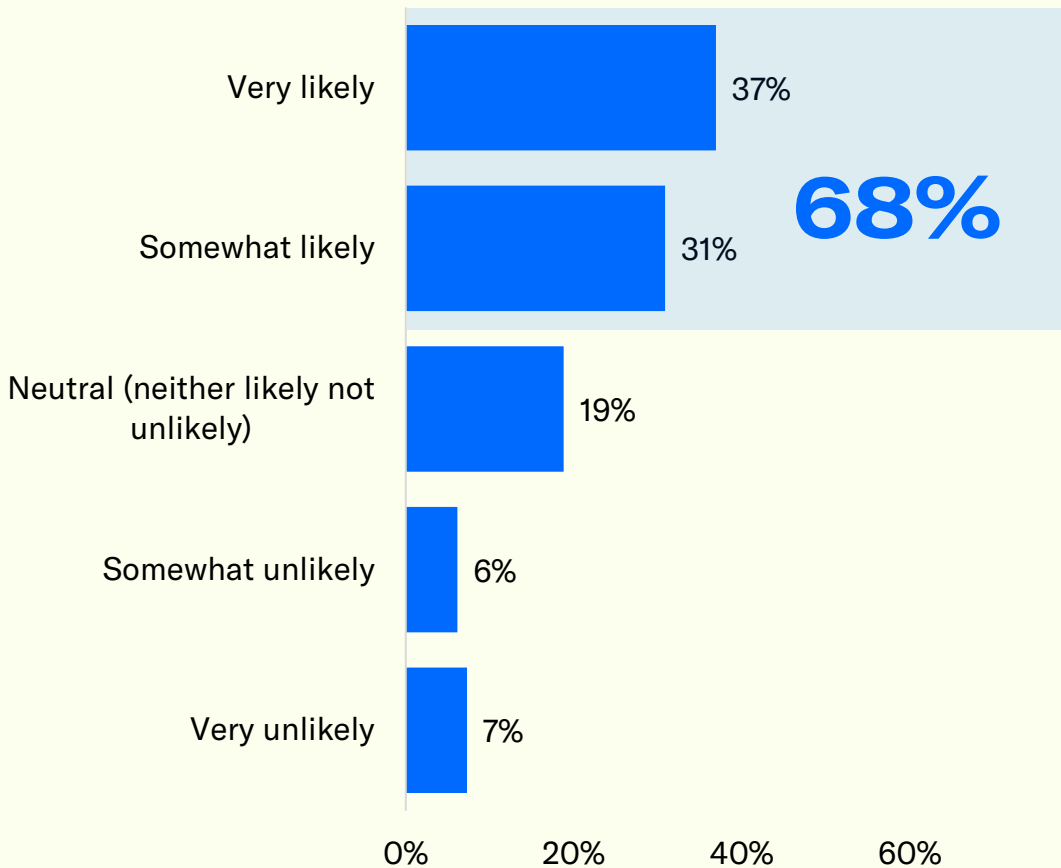
“
I am unfamiliar with meeting facilities in Bozeman.
-Lapsed visitor from Montana”

Potential Bozeman Visits

Likelihood to visit Bozeman in the next two years is strong at over two-thirds of overall regional residents.

Recent visitors (79%) have the highest likelihood, indicating a strong desire for repeat visitation especially among anyone who visited Bozeman in 2020 or later. Proximity is also a big driver for likelihood of near-term visitation, with nearly three-fourths of Montanans (72%) saying they will visit in the next two years. On the other hand, over one in five of those who have never been (22%) say they are somewhat or very unlikely to visit Bozeman in the near-term.

Likelihood to Visit in the Next Two Years



Likelihood to Visit in the Next Two Years by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Top 2 Box	68%	79%	50%	55%	72%
Very likely	37%	52%	18%	15%	45%
Somewhat likely	31%	28%	32%	40%	27%
Neutral (neither likely nor unlikely)	19%	12%	30%	22%	16%
Somewhat unlikely	6%	4%	9%	8%	5%
Very unlikely	7%	4%	11%	14%	6%
Base	534	302	141	91	234

= statistically significantly higher than overall responses

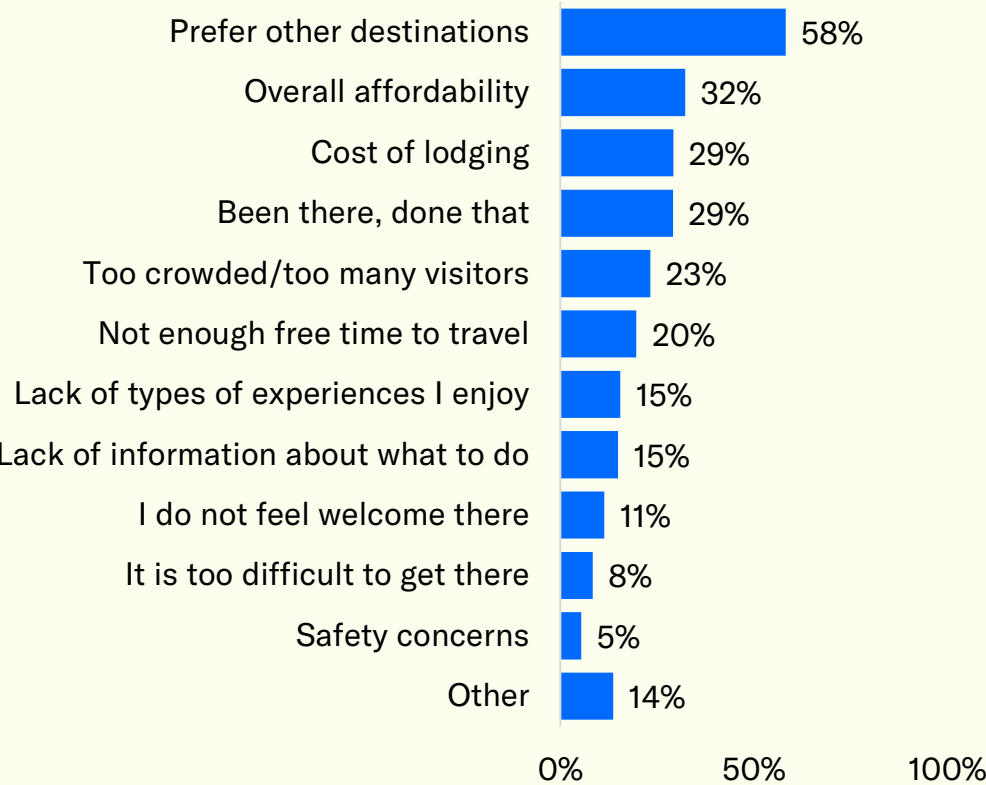
Question: How likely are you to visit Bozeman in the next two years?

Base: Total respondents.

Generally, a preference for other destinations is the top deterrent for visiting Bozeman, followed by concerns around costs.

A preference for other destinations is listed as the top deterrent overall (58%), followed by overall affordability (32%), the cost of lodging (29%), and a sense of having been there, done that (29%). Bearing in mind the small number of those who said they are unlikely to visit Bozeman in the next two years, among those who have never been, the lack of information about what to do there (44%) is the second-most selected deterrent. Also, among the few recent visitors unlikely to visit, three in ten (29%) say they do not feel welcome in Bozeman.

Bozeman Deterrents



Bozeman Deterrents by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Prefer other destinations	58%	53%	65%	54%	57%
Overall affordability	32%	48%	24%	24%	49%
Cost of lodging	29%	48%	24%	13%	48%
Been there, done that	29%	48%	33%	0%	37%
Too crowded/too many visitors	23%	34%	27%	4%	48%
Not enough free time to travel	20%	16%	23%	20%	6%
Lack of types of experiences I enjoy	15%	21%	5%	24%	11%
Lack of information about what to do	15%	9%	0%	44%	8%
I do not feel welcome there	11%	29%	0%	4%	21%
It is too difficult to get there	8%	3%	9%	13%	3%
Safety concerns	5%	12%	3%	0%	11%
Other	14%	10%	14%	17%	8%
Base	71	24	27	20	27

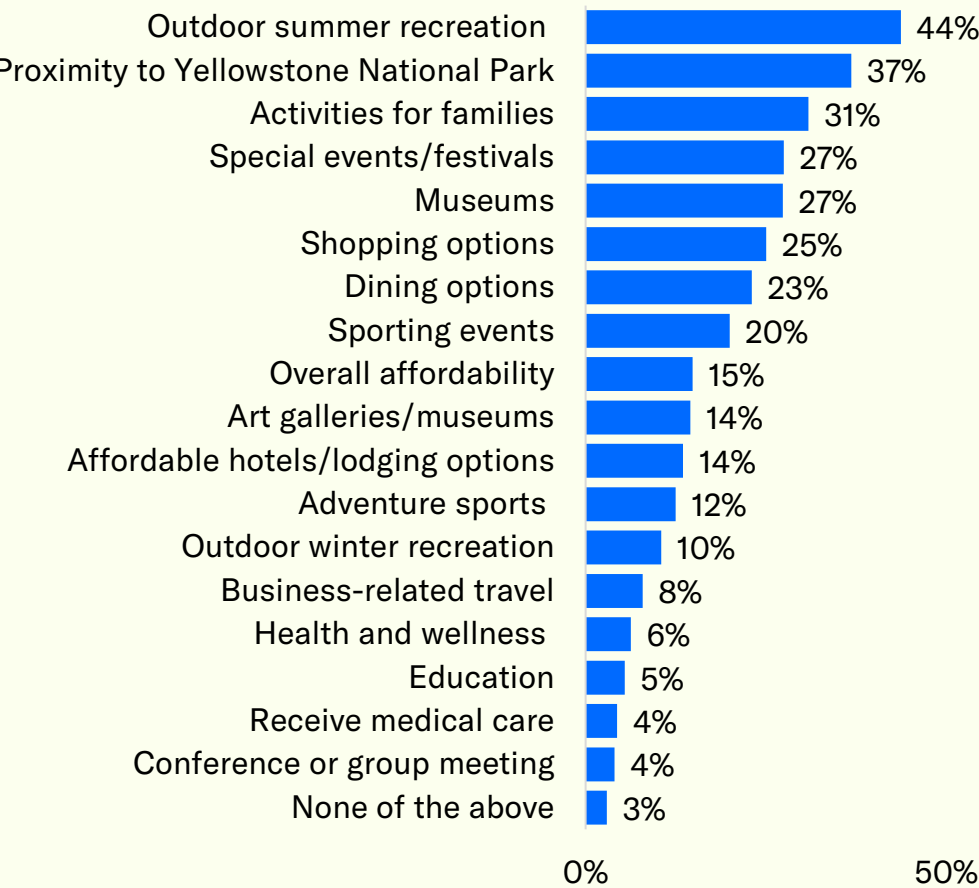
= statistically significantly higher than overall responses

Question: Why are you unlikely to visit Bozeman in the next two years? Select all that apply.

The access to warm-weather outdoor recreation and Yellowstone that Bozeman offers is a key draw for likely visitors.


On the other hand, for those likely to visit Bozeman in the next two years, the top reasons center around outdoor summer recreation (44%) and proximity to Yellowstone (37%). Notably, those who have never been but are likely to visit are significantly more likely to select outdoor summer recreation (74%), as well as overall affordability (33%). Shopping is a notably higher draw for recent visitors (31%), while Montanans are more likely to select dining options (30%) as their reason for visiting Bozeman again.

Reasons Likely to Visit in the Next Two Years



Reasons Likely to Visit in the Next Two Years by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Outdoor summer recreation	44%	35%	52%	74%	32%
Proximity to Yellowstone National Park	37%	31%	49%	50%	33%
Activities for families	31%	29%	31%	38%	29%
Special events/festivals	27%	30%	20%	25%	29%
Museums	27%	28%	26%	27%	34%
Shopping options	25%	31%	14%	13%	28%
Dining options	23%	26%	21%	13%	30%
Sporting events	20%	24%	14%	8%	26%
Overall affordability	15%	11%	17%	33%	4%
Art galleries/museums	14%	15%	10%	19%	15%
Affordable hotels/lodging options	14%	10%	13%	30%	5%
Adventure sports	12%	12%	11%	19%	7%
Outdoor winter recreation	10%	12%	4%	10%	8%
Business-related travel	8%	9%	4%	8%	9%
Health and wellness	6%	5%	1%	18%	4%
Education	5%	6%	5%	0%	7%
Receive medical care	4%	6%	1%	0%	7%
Conference or group meeting	4%	5%	2%	0%	4%
None of the above	3%	4%	0%	3%	5%
Base	361	240	71	50	168

 = statistically significantly higher than overall responses

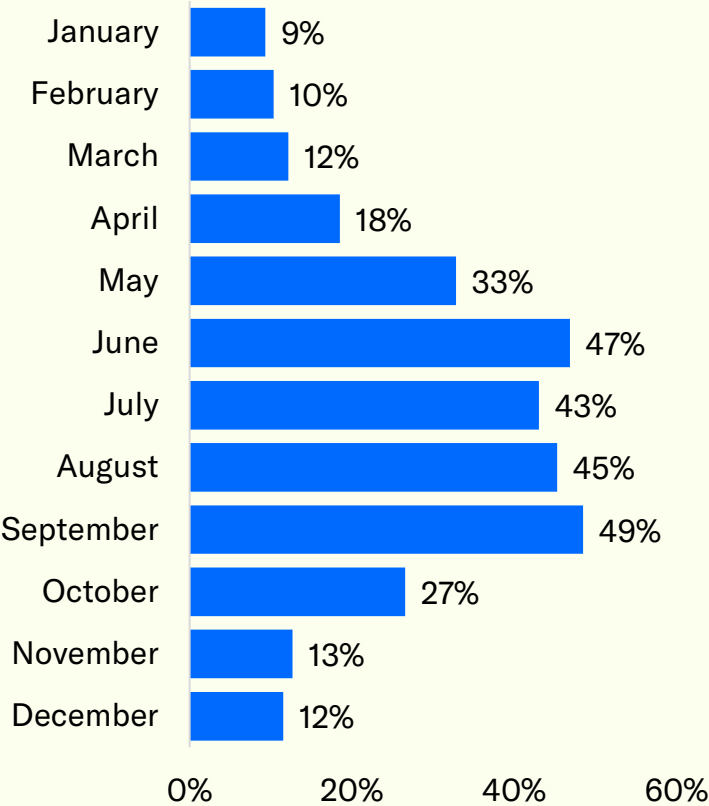
Question: Which of the following are reasons you are likely to visit Bozeman in the next two years?

Base: Respondents who are somewhat likely or very likely to visit Bozeman in the next two years.

June through September are the likeliest months of visitation to Bozeman across all segments.

Among those likely to visit Bozeman in the next two years, the largest share say they would visit in the warmer months, with nearly half selecting September (49%), followed by June (47%), August, (45%), and/or July (43%). Notably, recent visitors and Montanans are significantly more likely to say they would visit during the off-season months between October and March. Among those who have never been to Bozeman before, six in ten say they would visit June (61%), while just over half would visit in August (53%) and/or July (52%); none say they would visit between November and February.

Month(s) of Likely Visit



Month(s) of Likely Visit by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
January	9%	13%	4%	0%	16%
February	10%	14%	4%	0%	17%
March	12%	16%	2%	7%	19%
April	18%	22%	8%	18%	24%
May	33%	37%	22%	28%	41%
June	47%	44%	46%	61%	48%
July	43%	42%	40%	52%	44%
August	45%	45%	40%	53%	46%
September	49%	50%	47%	42%	56%
October	27%	32%	18%	12%	39%
November	13%	17%	7%	0%	22%
December	12%	16%	2%	0%	18%
Base	361	240	71	50	168

= statistically significantly higher than overall responses

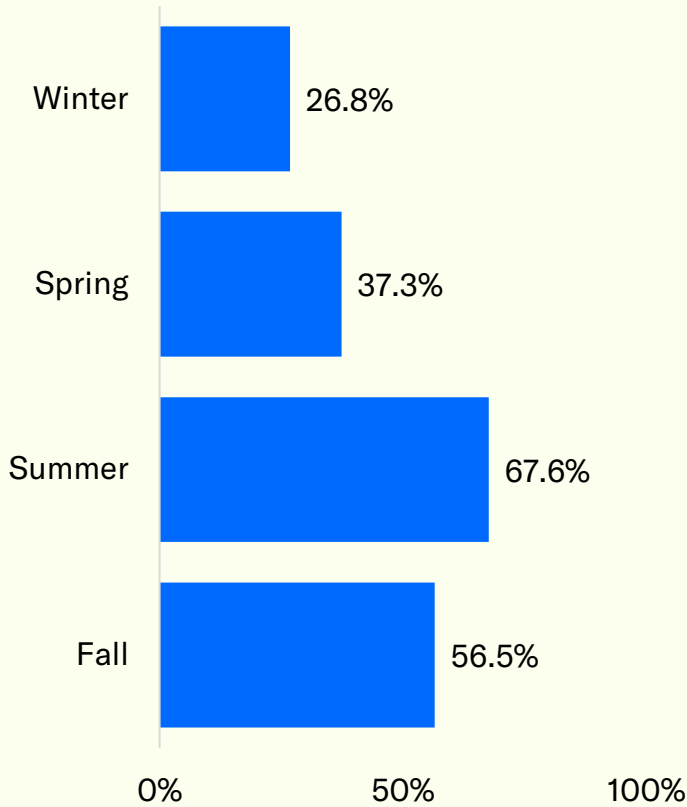
Question: Which month(s) are you most likely to visit Bozeman?

Base: Respondents who are somewhat likely or very likely to visit Bozeman in the next two years.

Recent visitors and Montanans are significantly more likely to visit Bozeman in winter or spring.

Grouping the months of likely visitation to Bozeman by season, summer (68%) is the most popular followed by fall (56%). In particular, Montanans are significantly more likely to say they would visit in the fall months of September-October (67%). Winter (27%) has the lowest share of overall likely regional visitors who say they are likely to visit (27%), though Montanans (40%) and recent visitors (35%) are significantly more likely. Similarly for the spring months, one-third (37%) are likely to visit, but this is much higher among Montanans (48%) and recent visitors (43%).

Season of Likely Visit



Season of Likely Visit by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Winter (Nov-Mar)	27%	35%	12%	7%	40%
Spring (Apr-May)	37%	43%	24%	31%	48%
Summer (Jun-Aug)	68%	66%	65%	80%	65%
Fall (Sep-Oct)	56%	60%	52%	44%	67%
Base	361	240	71	50	168

= statistically significantly higher than overall responses

Question: Which month(s) are you most likely to visit Bozeman?

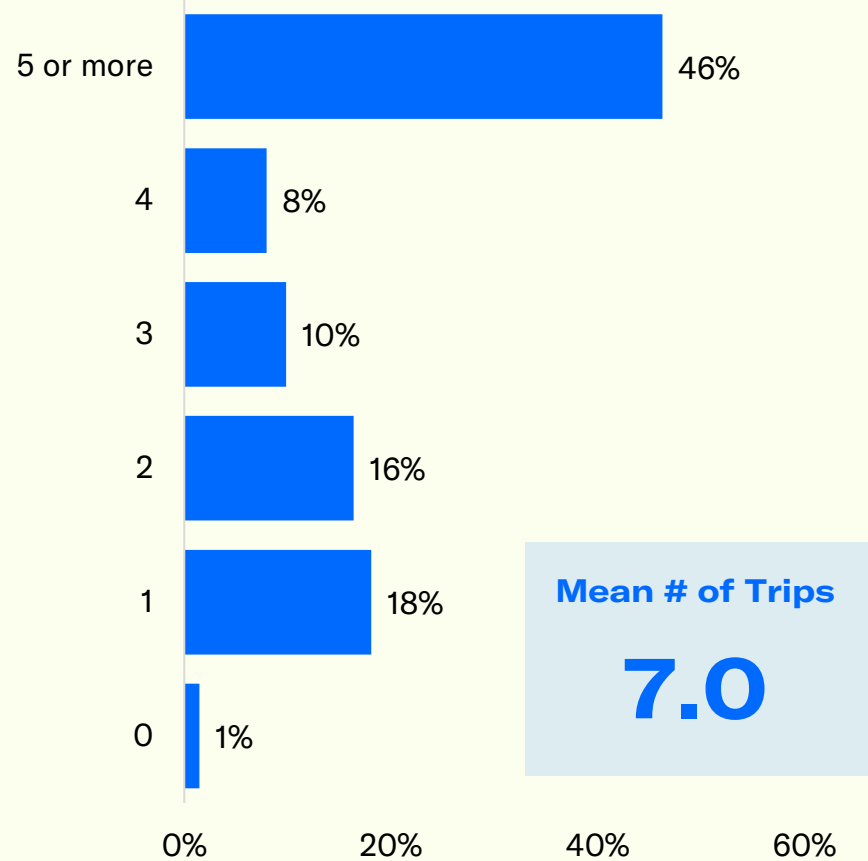
Base: Respondents who are somewhat likely or very likely to visit Bozeman in the next two years.

Past Bozeman Visitation

Most past regional visitors to Bozeman are repeat visitors.

Among regional residents who have been to Bozeman in the past, the majority have visited as an adult, with a mean of 7.0 trips to Bozeman taken in their adulthood. This is significantly higher among Montanans (10.2 mean trips) and recent visitors (8.4 mean trips), who are also much more likely to have taken five or more trips since the age of 18. While one in four (25%) of lapsed visitors have only taken one trip to Bozeman as an adult, nevertheless they have a mean of 4.6 trips to Bozeman.

Average Number of Visits to Bozeman



Average Number of Visits to Bozeman by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
5 or more	46%	56%	29%	-	65%
4	8%	8%	7%	-	9%
3	10%	8%	12%	-	9%
2	16%	13%	23%	-	10%
1	18%	14%	25%	-	7%
0	1%	0%	4%	-	1%
Mean	7.0	8.4	4.6	-	10.2
Base	380	243	137	0	168

= statistically significantly higher than overall responses

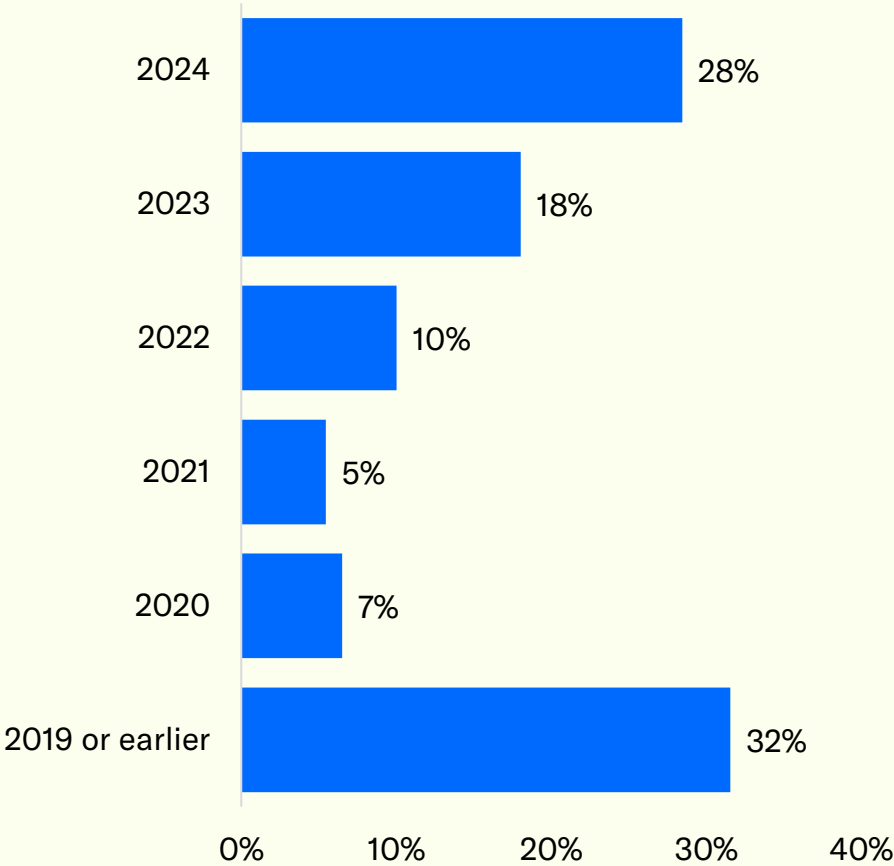
Question: How many times have you been to Bozeman as an adult (i.e., after the age of 18)?

Base: Respondents who have visited Bozeman as an adult at least once.

Most past visitors from within the region have traveled to Bozeman in 2020 or later.

Of regional residents who have visited Bozeman as an adult at least once, the majority have visited recently (68%), with over four in ten (46%) saying they have visited in 2023 or 2024. Montanans are significantly more likely to have visited within the year 2024 (42%).

Year of Most Recent Visit



Year of Most Recent Visit by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
2024	28%	42%	0%	-	42%
2023	18%	26%	0%	-	17%
2022	10%	15%	0%	-	10%
2021	5%	8%	0%	-	4%
2020	7%	9%	0%	-	6%
2019 or earlier	32%	0%	100%	-	22%
Base	443	302	141	0	228

= statistically significantly higher than overall responses

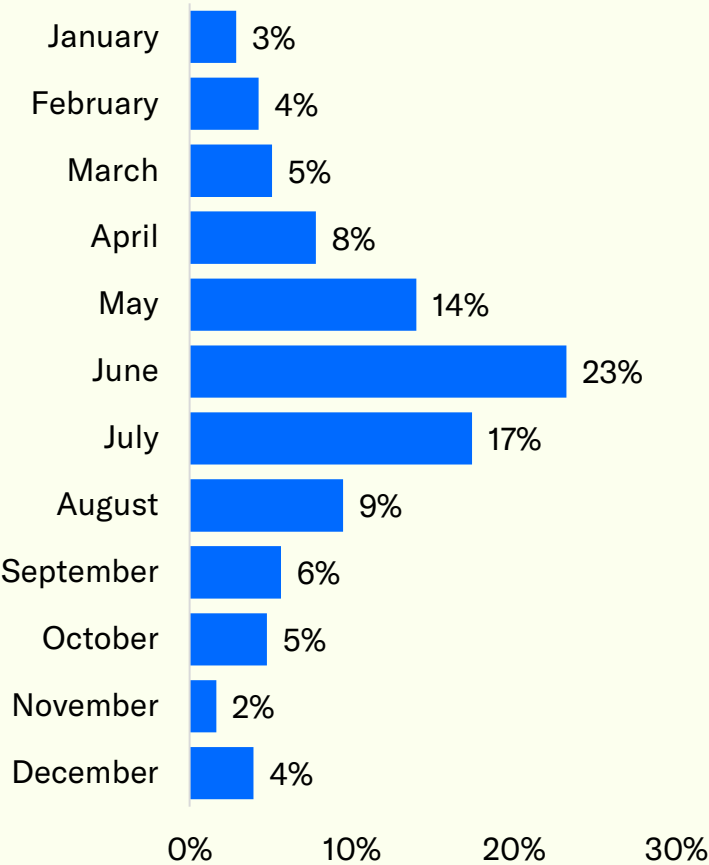
Question: When was your most recent visit to Bozeman?

Base: Respondents who have visited Bozeman as an adult at least once.

June and July were the most common months when regional residents have visited Bozeman in the past.

For regional residents who have visited Bozeman as an adult, the largest shares visited in June (23%), followed by July (17%) and May (14%). The smallest shares are reported for the winter months, with an uptick in the April (8%) and May (14%) before tapering off in August (9%) for past visitors. There are no statistically significant differences among the different key segments.

Month(s) of Most Recent Visit



Month(s) of Most Recent Visit by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
January	3%	3%	2%	-	2%
February	4%	5%	3%	-	4%
March	5%	6%	3%	-	6%
April	8%	8%	8%	-	7%
May	14%	14%	14%	-	16%
June	23%	24%	21%	-	23%
July	17%	17%	19%	-	19%
August	9%	7%	15%	-	6%
September	6%	6%	5%	-	4%
October	5%	6%	3%	-	6%
November	2%	1%	2%	-	2%
December	4%	4%	4%	-	3%
Base	443	302	141	0	443

= statistically significantly higher than overall responses

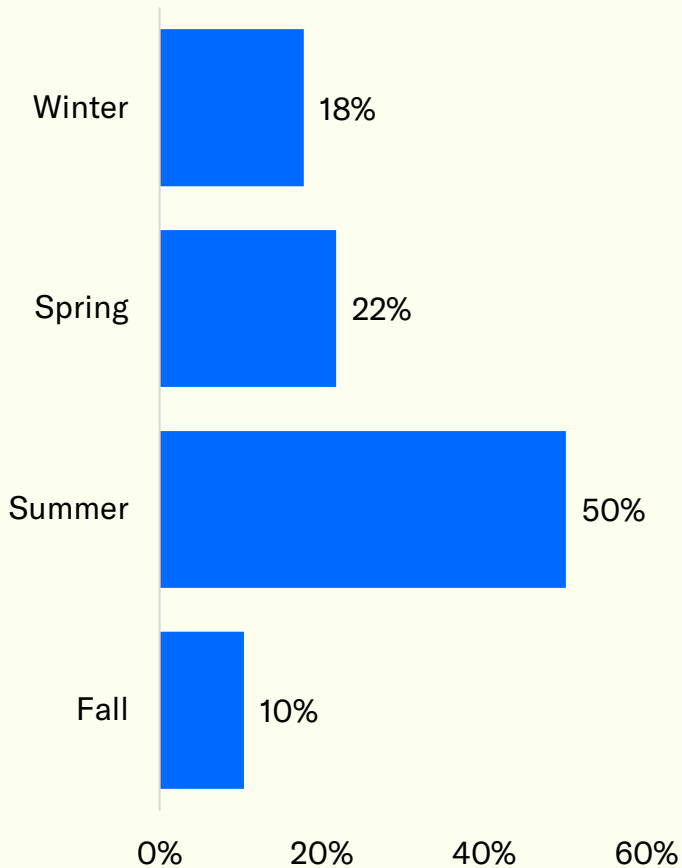
Question: When was your most recent visit to Bozeman?

Base: Respondents who have visited Bozeman as an adult at least once.

Historically, summer has by far been the most popular season for regional residents’ most recent Bozeman trip.

While fall is the second-most selected season for visitation to Bozeman among regional residents who are likely to visit Bozeman in the next two years, among past visitors, summer (50%), followed by spring (22%) has been the most popular season for visitation. There are no statistically significant differences among the different key segments.

Season of Likely Visit



Season of Likely Visit by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Winter (Nov-Mar)	18%	19%	15%	-	19%
Spring (Apr-May)	22%	22%	21%	-	23%
Summer (Jun-Aug)	50%	48%	55%	-	49%
Fall (Sep-Oct)	10%	11%	8%	-	10%
Base	361	240	71	0	168

= statistically significantly higher than overall responses

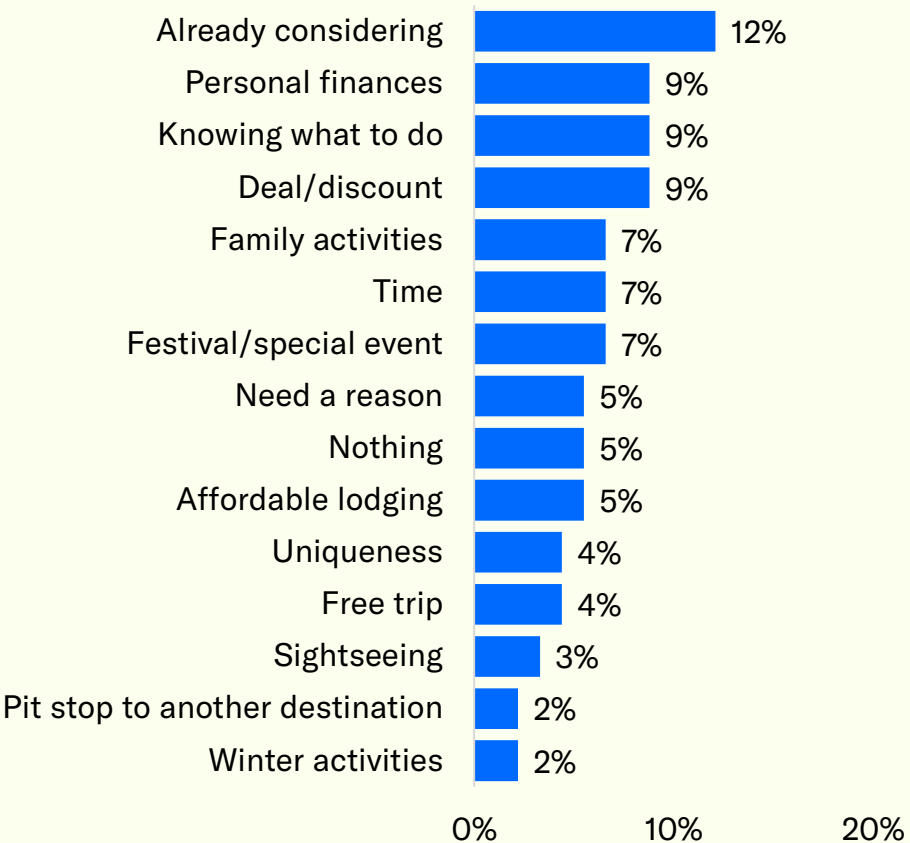
Question: When was your most recent visit to Bozeman?

Base: Respondents who have visited Bozeman as an adult at least once.

Highlighting unique things to do that offer good value or appeal to families could help with conversion.

For regional residents who have never been to Bozeman before, more than one in ten (12%) say they are already considering a visit to Bozeman. However, finances (9%), knowing what there is to do (9%), and a good deal/discount (9%) were the next most-cited ideas for what would convince these residents to consider visited the destination. Providing unique activities, particularly that demonstrate good value or are good for families, could be an effective way to convert these residents.

Conversion Opportunities – Unaided



Conversion Opportunities – Unaided by Segment

	Never Been	Montana Residents
Already considering	12%	0%
Personal finances	9%	17%
Knowing what to do	9%	0%
Deal/discount	9%	0%
Family activities	7%	0%
Time	7%	0%
Festival/special event	7%	0%
Need a reason	5%	0%
Nothing	5%	33%
Affordable lodging	5%	0%
Uniqueness	4%	0%
Free trip	4%	0%
Sightseeing	3%	0%
Pit stop to another destination	2%	0%
Winter activities	2%	17%
Outdoor activities	2%	0%
Base	91	6

= statistically significantly higher than overall responses

Question: What would convince you to consider a future visit to Bozeman?

Base: Respondents who have never visited Bozeman as an adult.

What would convince you to consider a future visit to Bozeman?

“
If it offered things the whole family could or would enjoy – something for everyone.
-Eastern Washington resident
”

“
I would just like to see an exciting ad highlighting what it has to offer. I don't live too far away so I'd like to go, I just never really thought about Bozeman because it's never been brought up or put on my radar.
-Eastern Washington resident
”

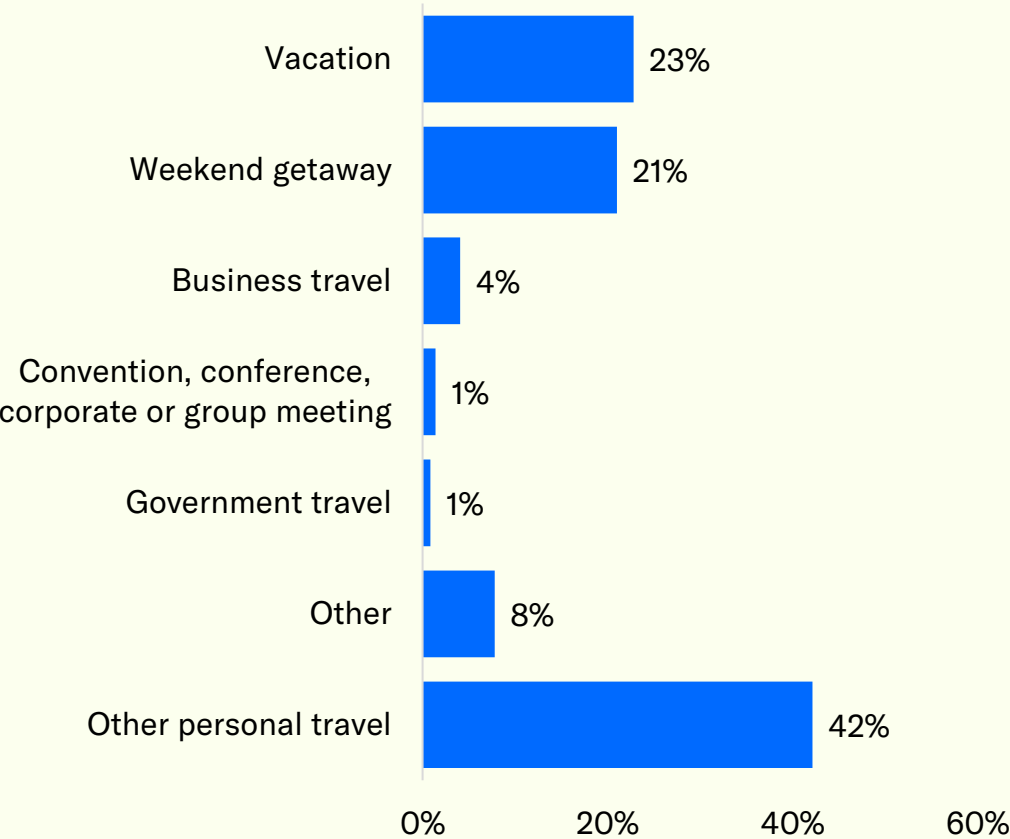
“
If I knew more about what to do there. We know about Yellowstone, fly fishing, etc., but for those of us that don't do that, what else is there?
-Wyoming resident
”

Recent Bozeman Visitors

Recent regional travel to Bozeman is largely for leisure or personal reasons.


Among visitors whose last trip to Bozeman was in 2020 or later, most say their most recent trip was for leisure, with 44 percent of overall recent visitors saying they traveled for either a vacation (23%) or a weekend getaway (21%). A similar share say they traveled for other personal reasons (42%), with only 6 percent saying they came for business, a MICE event, or government travel. For Montanan recent visitors, they are more likely to say they traveled to Bozeman for other personal reasons (51%), but less likely to say that they traveled to Bozeman for a vacation (10%).

Trip Purpose



Trip Purpose by Segment

	Recent Visitors	Montana Residents
Vacation	23%	10%
Weekend getaway	21%	20%
Business travel	4%	5%
Convention, conference, corporate or group meeting	1%	2%
Government travel	1%	1%
Other	8%	11%
Other personal travel	42%	51%
Base	302	177

 = statistically significantly higher than overall responses

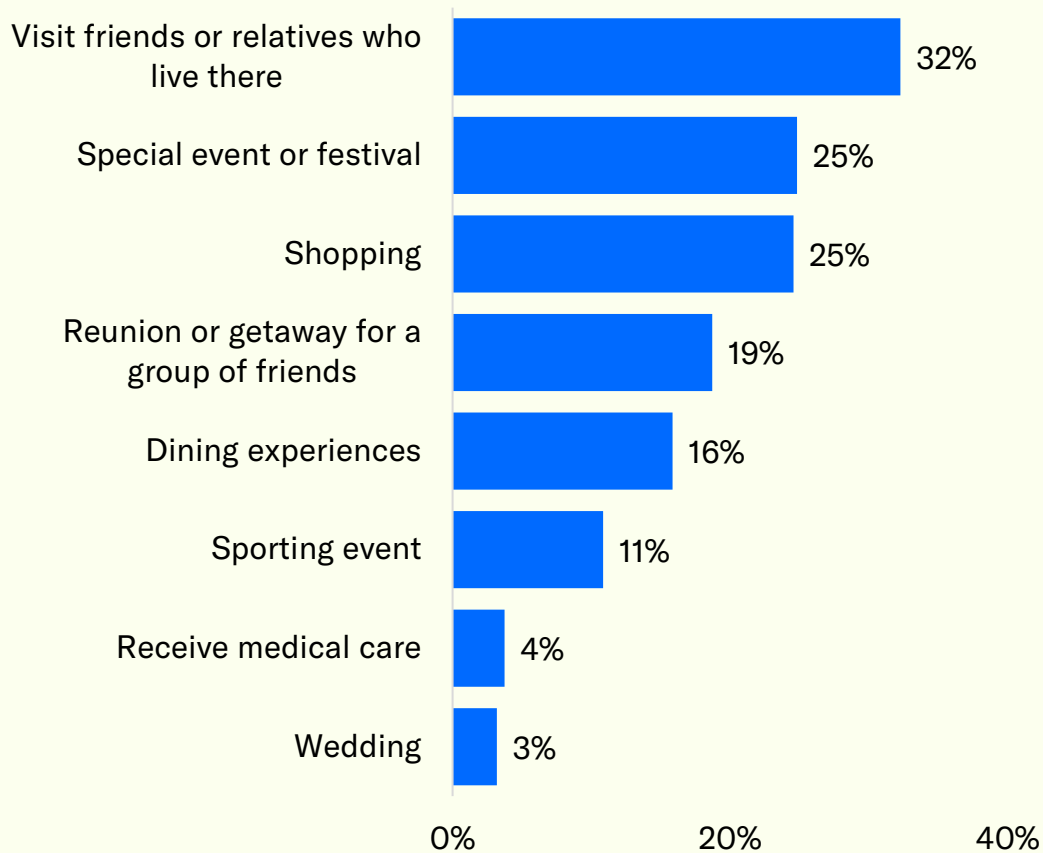
Question: Which describes your most recent visit to Bozeman?

Base: Respondents whose most recent visit to Bozeman was in 2020 or later.

One in four recent visitors say a special event and/or shopping were important factors when deciding to visit Bozeman.


Looking at other trip drivers that factored into recent visitors’ decision to travel to Bozeman on this latest trip, at one in three (32%) the largest share say visiting friends or relatives (32%) was an important factor. However, one in four say a special event/festival (25%) and/or shopping (25%) were important, suggesting these offerings are a key draw for regional visitors. Additionally, about one in five (19%) say a reunion or friends’ trip was an important driver, followed by 16 percent who say a dining experience was a key factor. There were no statistically significantly higher responses among the key segments.

Trip Drivers



Trip Drivers by Segment

	Recent Visitors	Montana Residents
Visit friends or relatives who live there	32%	32%
Special event or festival	25%	24%
Shopping	25%	22%
Reunion or getaway for a group of friends	19%	10%
Dining experiences	16%	16%
Sporting event	11%	11%
Receive medical care	4%	3%
Wedding	3%	1%
Base	302	177

 = statistically significantly higher than overall responses

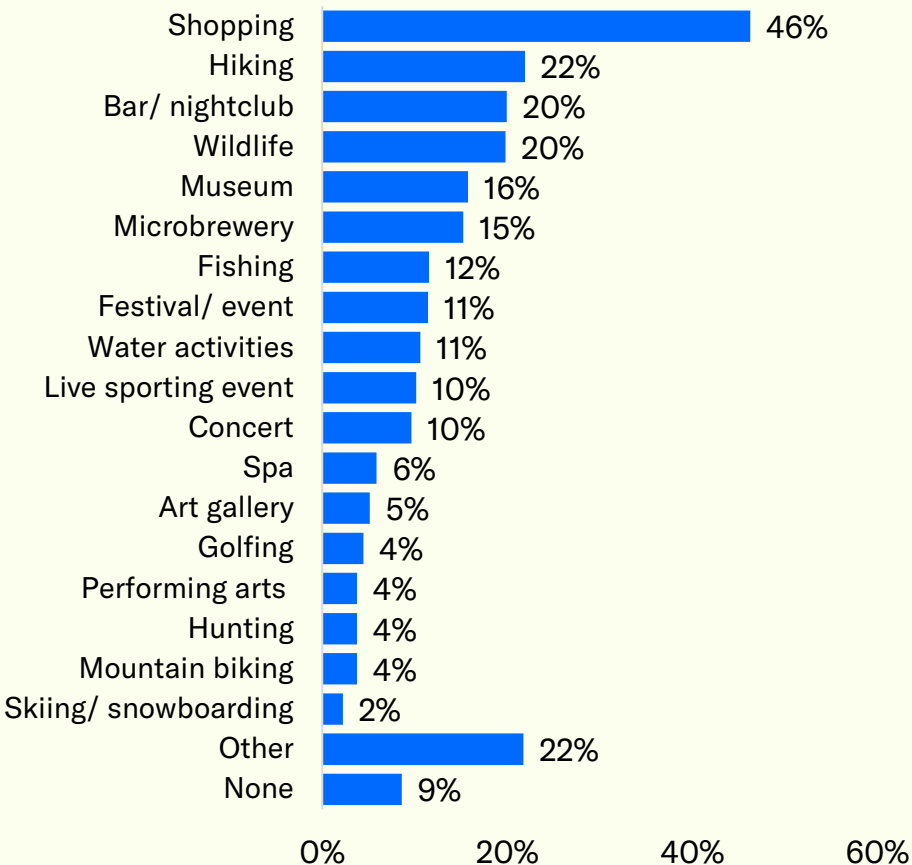
Question: Were any of the following important to your decision to make this trip to Bozeman? Select all that apply.

Base: Respondents whose most recent visit to Bozeman was in 2020 or later.

Shopping is by far the most commonly participated in activity for recent Bozeman visitors.

Interestingly, while one in four say shopping was an important factor in why they traveled to Bozeman, a much larger share (46%) actually engaged in shopping on their latest trip to Bozeman, the most-participated in activity for recent visitors. Conversely, while one in four also say a special event or festival was important, only about one in ten (11%) participated in a festival or event. Despite lower in-market participation, the high share of those who rank festivals/events as important indicates it still plays a role in the dreaming/planning stages of their trip to Bozeman. There were no statistically significantly higher responses among the key segments.

Activities Participated In



Activities Participated In by Segment

	Recent Visitors	Montana Residents
Shopping	46%	43%
Hiking	22%	15%
Bar/ nightclub	20%	17%
Wildlife	20%	15%
Museum	16%	15%
Microbrewery	15%	17%
Fishing	12%	8%
Festival/ event	11%	7%
Water activities	11%	6%
Live sporting event	10%	11%
Concert	10%	8%
Spa	6%	4%
Art gallery	5%	2%
Golfing	4%	2%
Performing arts	4%	3%
Hunting	4%	2%
Mountain biking	4%	2%
Skiing/ snowboarding	2%	0%
Other	22%	23%
None	9%	11%
Base	302	177

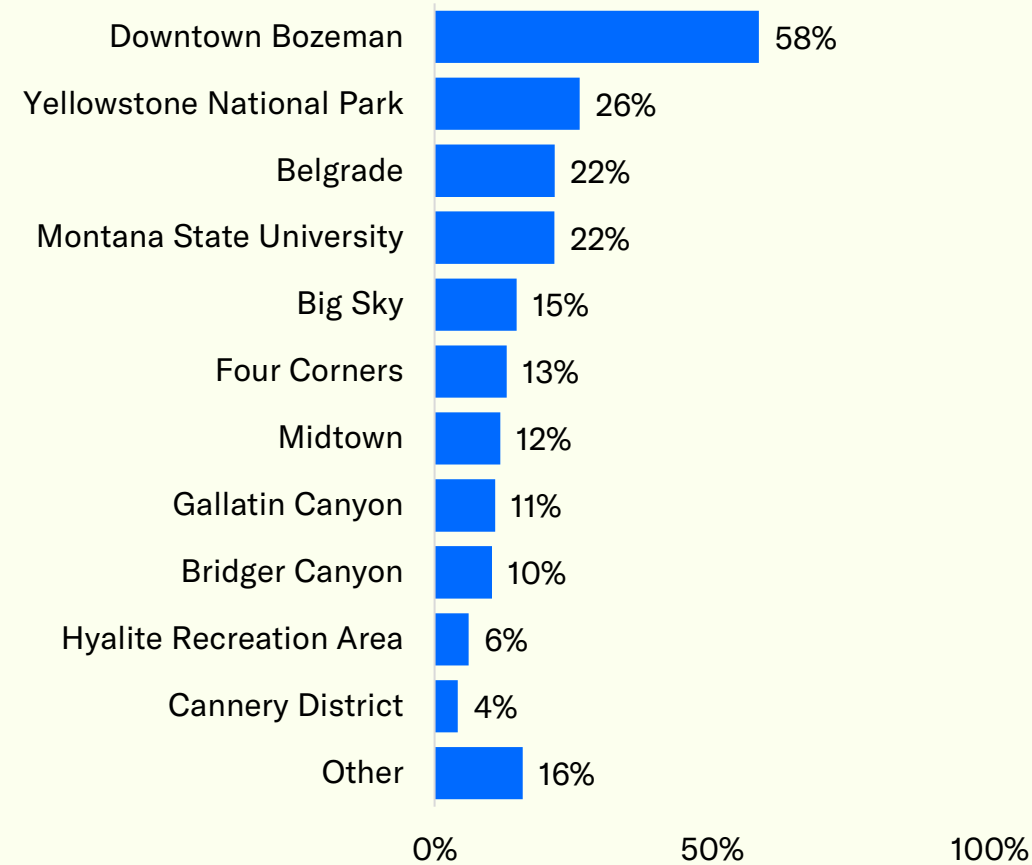
 = statistically significantly higher than overall responses

Question: Which of the following activities did you participate in on your most recent trip to Bozeman?

For recent visitors to Bozeman, the downtown area of the city is the most popular neighborhood to visit.


The majority of recent visitors went to Downtown Bozeman (58%), followed distantly by one in four who visited Yellowstone National Park (26%). About one in five visited Belgrade (22%) and/or Montana State University (22%). There were no statistically significantly higher responses among the key segments.

Bozeman Areas Visited



Bozeman Areas Visited by Segment

	Recent Visitors	Montana Residents
Downtown Bozeman	58%	57%
Yellowstone National Park	26%	19%
Belgrade	22%	25%
Montana State University	22%	20%
Big Sky	15%	8%
Four Corners	13%	17%
Midtown	12%	13%
Gallatin Canyon	11%	9%
Bridger Canyon	10%	8%
Hyalite Recreation Area	6%	3%
Cannery District	4%	3%
Other	16%	16%
Base	302	177

 = statistically significantly higher than overall responses

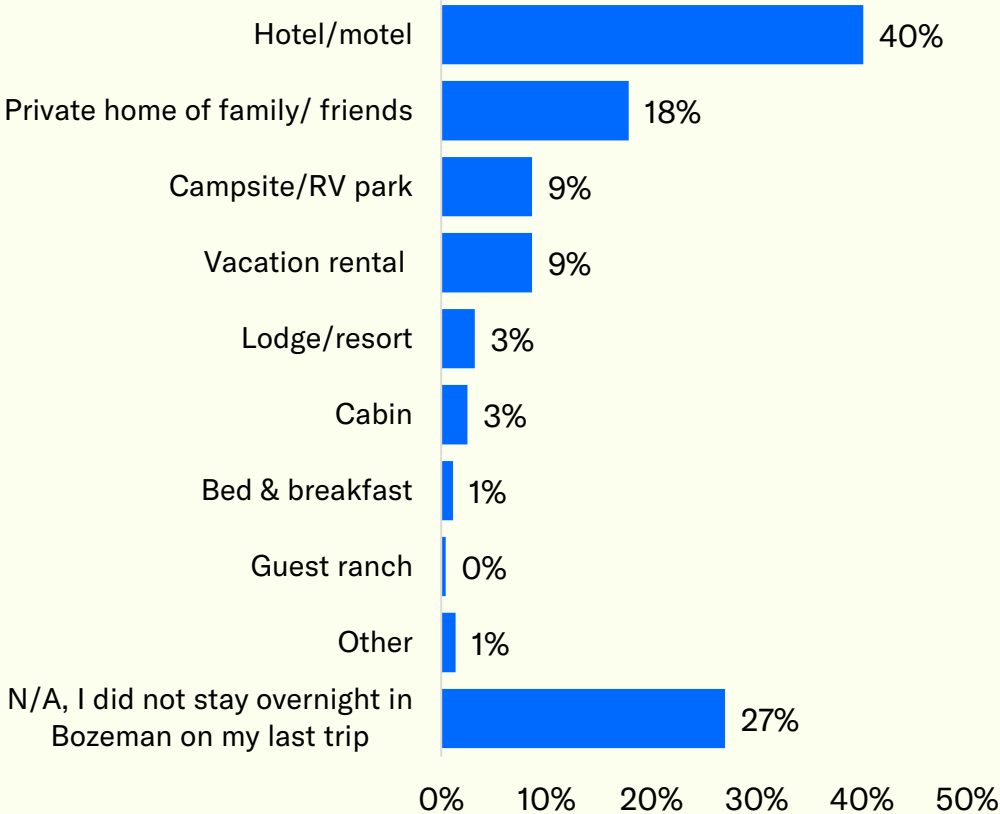
Question: Did you visit any of the following areas on your last trip to the Bozeman region?

Base: Respondents whose most recent visit to Bozeman was in 2020 or later.

Hotel/motel is the most prevalent lodging type for recent overnight guests; Montanans are more likely to be day trippers.

Among recent visitors, about one in four (27%) were day trippers, while 40 percent of recent visitors stayed in a hotel/motel. Just under one in five (18%) stayed in a private home, while one in ten stayed at a campsite/RV park (9%) or vacation rental (9%). Only a small share stayed in a lodge/resort (3%) or cabin (3%). Notably, Montanan recent visitors were much more likely than overall recent visitors to have just visited Bozeman for a day trip (37%).

Lodging Type



Lodging Type by Segment

	Recent Visitors	Montana Residents
Hotel/motel	40%	35%
Private home of family/ friends	18%	18%
Campsite/RV park	9%	5%
Vacation rental	9%	4%
Lodge/resort	3%	1%
Cabin	3%	0%
Bed & breakfast	1%	0%
Guest ranch	0%	0%
Other	1%	2%
N/A, I did not stay overnight in Bozeman on my last trip	27%	37%
Base	302	177

= statistically significantly higher than overall responses

Question: What type of lodging/accommodations did you stay in on your last trip to Bozeman?

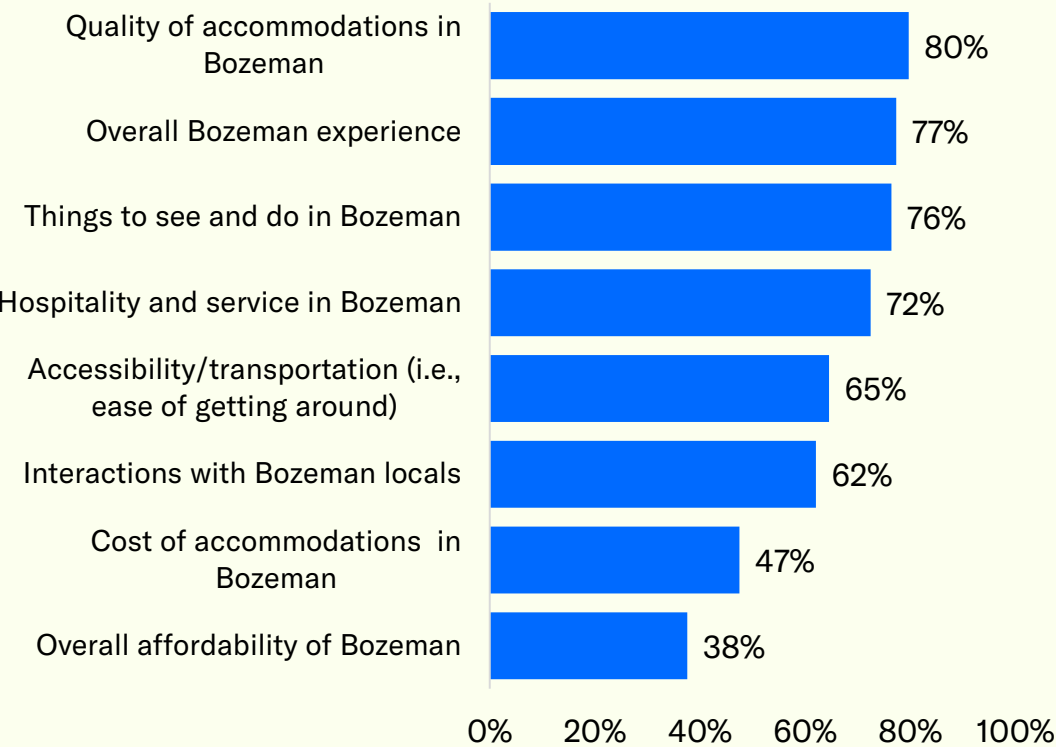
Base: Respondents whose most recent visit to Bozeman was in 2020 or later.

Overall trip satisfaction is high, but accommodation costs and overall affordability rank low.

The majority of recent visitors are satisfied with most aspects of their trip, with three-fourths saying they were satisfied with their overall Bozeman experience (77%). In particular, the largest share of recent visitors say they felt satisfied with the quality of accommodations (80%). Accessibility/transportation (65%) ranked slightly lower, as did interactions with locals (62%), however the most concerning rankings are around the expense. Less than half of recent visitors are satisfied with the cost of accommodations (47%) while even fewer are satisfied with the destination’s overall affordability (38%). There were no statistically significantly higher responses among the key segments.


Trip Satisfaction

(% “Satisfied” or “Extremely Satisfied”)



Lodging Type by Segment

	Recent Visitors	Montana Residents
Quality of accommodations in Bozeman	80%	71%
Overall Bozeman experience	77%	72%
Things to see and do in Bozeman	76%	70%
Hospitality and service in Bozeman	72%	62%
Accessibility/transportation (i.e., ease of getting around)	65%	53%
Interactions with Bozeman locals	62%	54%
Cost of accommodations in Bozeman	47%	28%
Overall affordability of Bozeman	38%	20%
Base	302	177

 = statistically significantly higher than overall responses

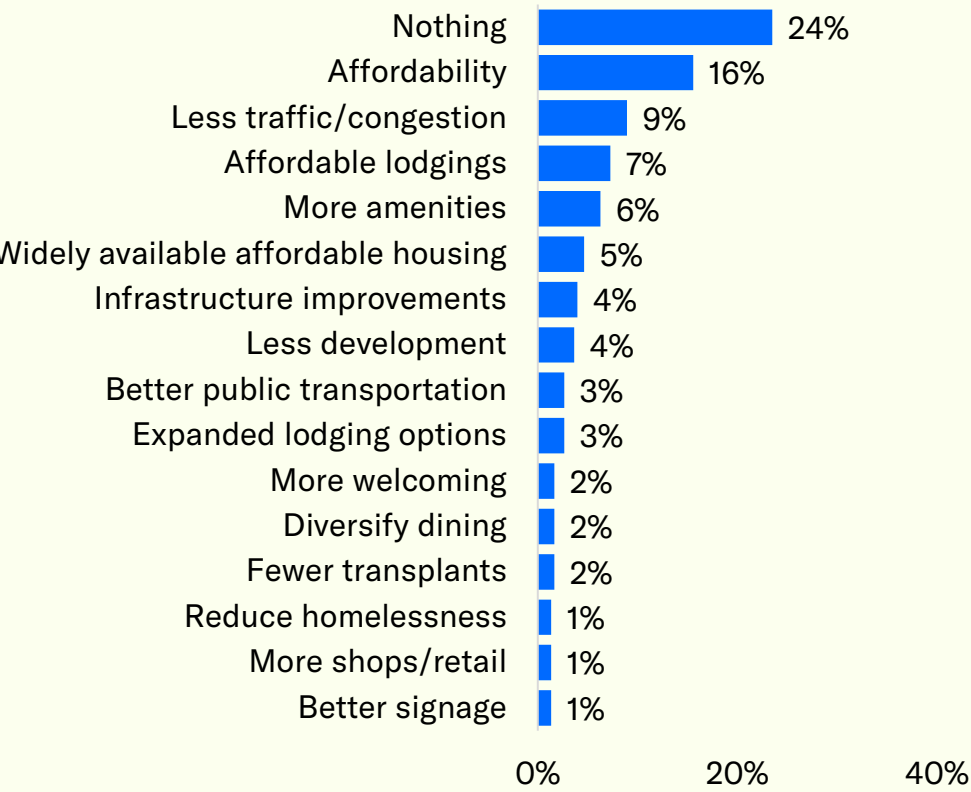
Question: How satisfied were you with the following on your last trip to Bozeman?

Base: Respondents whose most recent visit to Bozeman was in 2020 or later.

Suggested improvements center on addressing high costs and better infrastructure.

While one in four (24%) recent visitors had no suggestions for how to improve Bozeman as a destination for visitors, the most frequently suggested improvement is affordability (16%) followed by addressing traffic and congestion (9%). Many other suggestions center around these two themes of affordability and infrastructure improvements, such as affordable lodgings (7%) and affordable housing (5%), as well as infrastructure improvements (4%), better public transportation (3%), and better signage (1%).

Improvement Suggestions – Unaided



Improvement Suggestions – Unaided by Segment

	Recent Visitors	Montana Residents
Nothing	24%	17%
Affordability	16%	22%
Less traffic/congestion	9%	11%
Affordable lodgings	7%	10%
More amenities	6%	6%
Widely available affordable housing	5%	7%
Infrastructure improvements	4%	4%
Less development	4%	3%
Better public transportation	3%	2%
Expanded lodging options	3%	1%
More welcoming	2%	1%
Diversify dining	2%	1%
Fewer transplants	2%	2%
Reduce homelessness	1%	1%
More shops/retail	1%	2%
Better signage	1%	1%
Base	91	6

Question: What changes and/or developments would contribute to making Bozeman better for visitors?

Base: Respondents whose most recent visit to Bozeman was in 2020 or later.

It needs to be made more affordable. Generally, a lot of the new developments have taken away the charm from Bozeman. It has lost a lot of its old charm.

-Wyoming resident

More family friendly things. It is a nice date getaway but not tons for families unless you go on through to Yellowstone.

-Montana resident

It would be great if they had more road options to get around town. The traffic is very heavy in certain areas, so having additional access to places would be nice. I enjoy visiting Universal Studios and Disneyland theme parks, so maybe a Montana themed amusement park could be interesting and draw more visitors in.

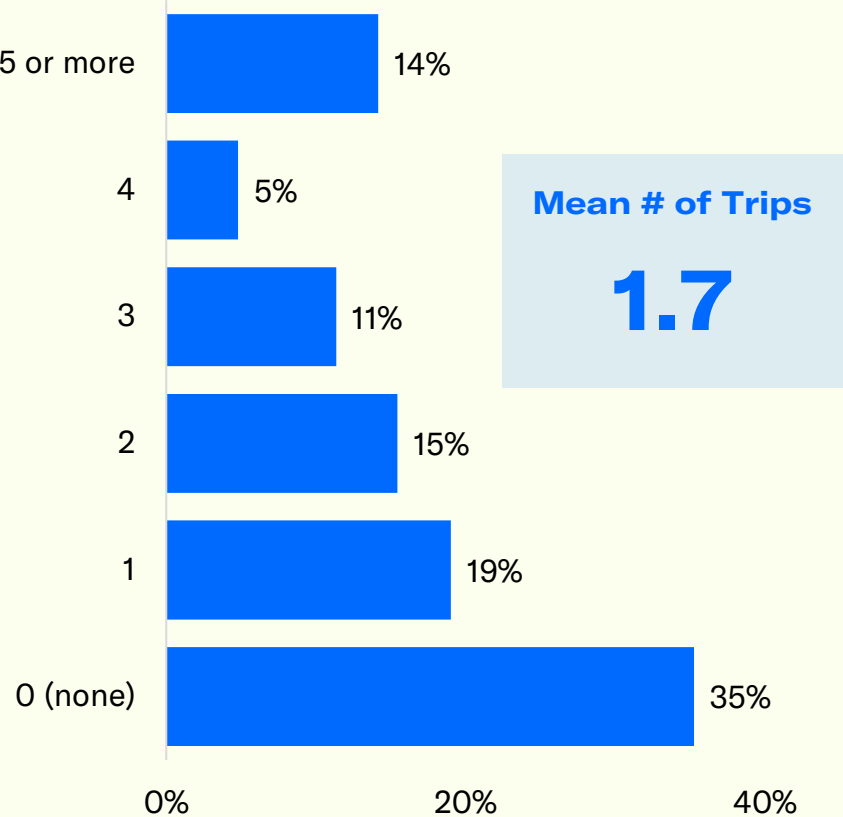
-Montana resident

Montana Travel

Montanans and recent visitors to Bozeman are generally more likely to have traveled overnight in Montana in the past year.

Regional residents took a mean of 1.7 overnight trips within Montana in the past 12 months, with just over one in three (35%) saying they did not take any. There are notable differences by segment, with the majority of those who have never been to Bozeman (75%) and lapsed visitors (54%) reporting they did not take any overnight trips in Montana in the past year. On the other hand, Montanans are much more likely to have taken such a trip with a mean of 2.7 trips, followed closely by recent visitors (mean of 2.4 trips).

Past 12-Month Montana Overnight Trips



Past 12-Month Montana Overnight Trips by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
5 or more	14%	21%	7%	0%	29%
4	5%	7%	2%	1%	8%
3	11%	16%	6%	5%	13%
2	15%	19%	12%	9%	20%
1	19%	22%	19%	10%	13%
0 (none)	35%	15%	54%	75%	17%
Mean	1.7	2.4	1.1	0.5	2.7
Base	534	302	141	91	234

= statistically significantly higher than overall responses

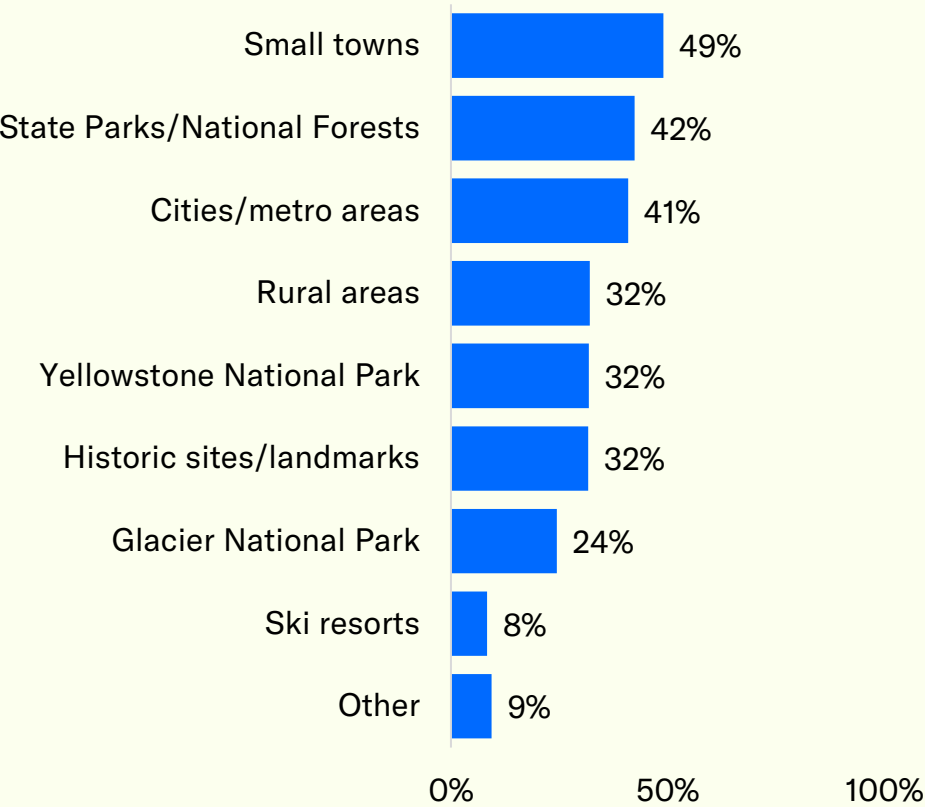
Question: How many overnight trips have you taken within the state of Montana in the past 12 months?

Base: Total respondents.

Small towns are the most popular types of Montana destinations for overnight trips.

Among regional residents who have taken an overnight trip in Montana in the past year, roughly half say they typically visit small towns in Montana (49%), followed by four in ten who said state parks/national forests (42%) and/or cities/metro areas (41%). There were no statistically significantly higher responses among the key segments.

Typical Montana Overnight Destinations



Typical Montana Overnight Destinations by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Small towns	49%	49%	48%	46%	54%
State Parks/National Forests	42%	43%	48%	21%	43%
Cities/metro areas	41%	44%	30%	31%	43%
Rural areas	32%	31%	41%	21%	34%
Yellowstone National Park	32%	31%	40%	17%	26%
Historic sites/landmarks	32%	31%	37%	21%	27%
Glacier National Park	24%	25%	22%	23%	22%
Ski resorts	8%	10%	6%	0%	9%
Other	9%	8%	13%	19%	11%
Base	344	254	66	24	195

= statistically significantly higher than overall responses

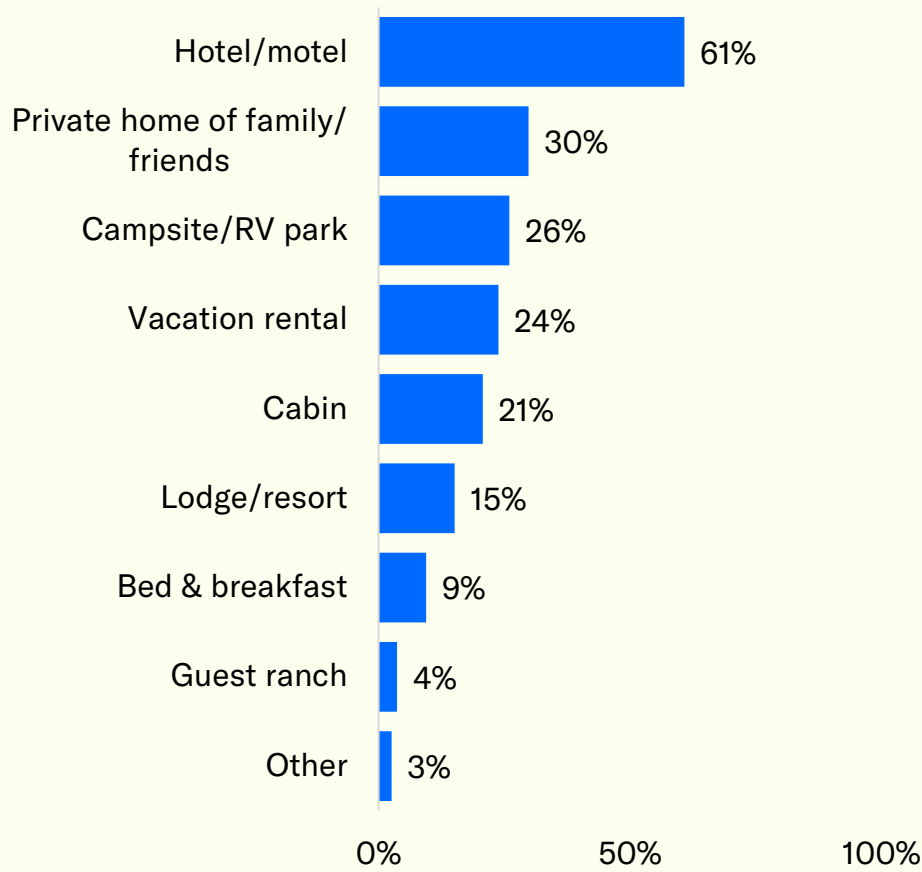
Question: Which of the following destination types do you usually visit on your overnight trips within the state of Montana?

Base: Respondents who have taken at least one overnight trip in Montana in the past 12 months.

Paid hotel or motel lodging is by far the most preferred type of accommodations in Montana among regional residents.

Most regional residents who have taken an overnight trip within Montana in the last year say they prefer to stay in a hotel or motel on these trips (61%). This is followed distantly by three in ten (30%) who would stay in a private home. There were no statistically significantly higher responses among the key segments.

Preferred Montana Lodging Types



Preferred Montana Lodging Types by Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Hotel/motel	61%	62%	56%	56%	65%
Private home of family/ friends	30%	31%	29%	19%	36%
Campsite/RV park	26%	24%	33%	27%	27%
Vacation rental	24%	24%	25%	19%	19%
Cabin	21%	19%	25%	27%	21%
Lodge/resort	15%	14%	18%	15%	13%
Bed & breakfast	9%	9%	12%	8%	7%
Guest ranch	4%	3%	3%	8%	2%
Other	3%	2%	3%	10%	3%
Base	344	254	66	24	195

= statistically significantly higher than overall responses

Question: On your overnight trips within Montana, which of the following types of accommodations do you prefer to stay?

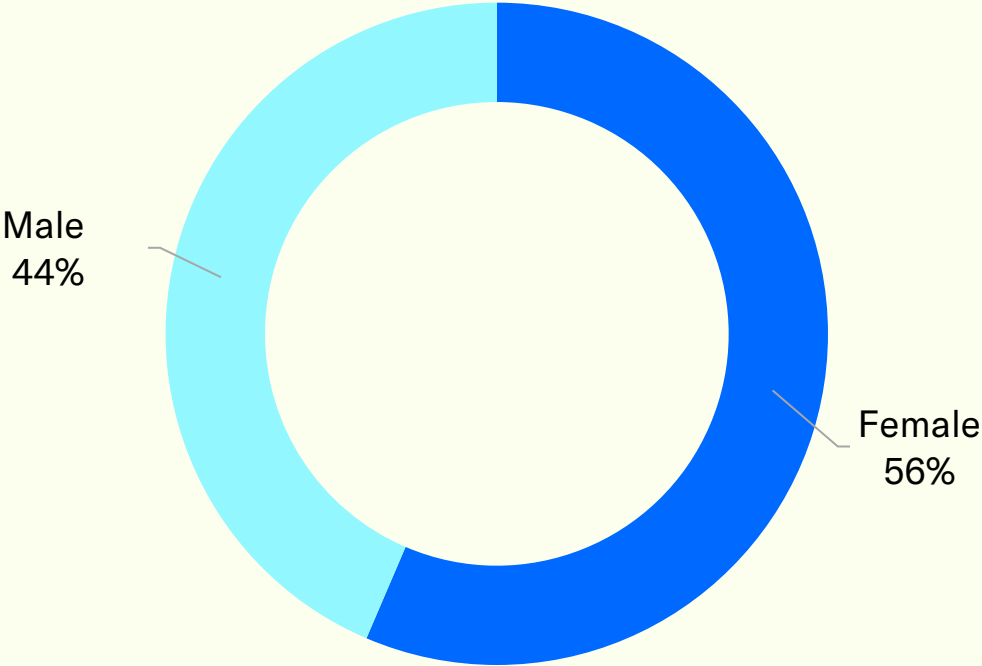
Base: Respondents who have taken at least one overnight trip in Montana in the past 12 months.

Future Partners

Appendix: Demographics

Demographics

Gender



By Segment

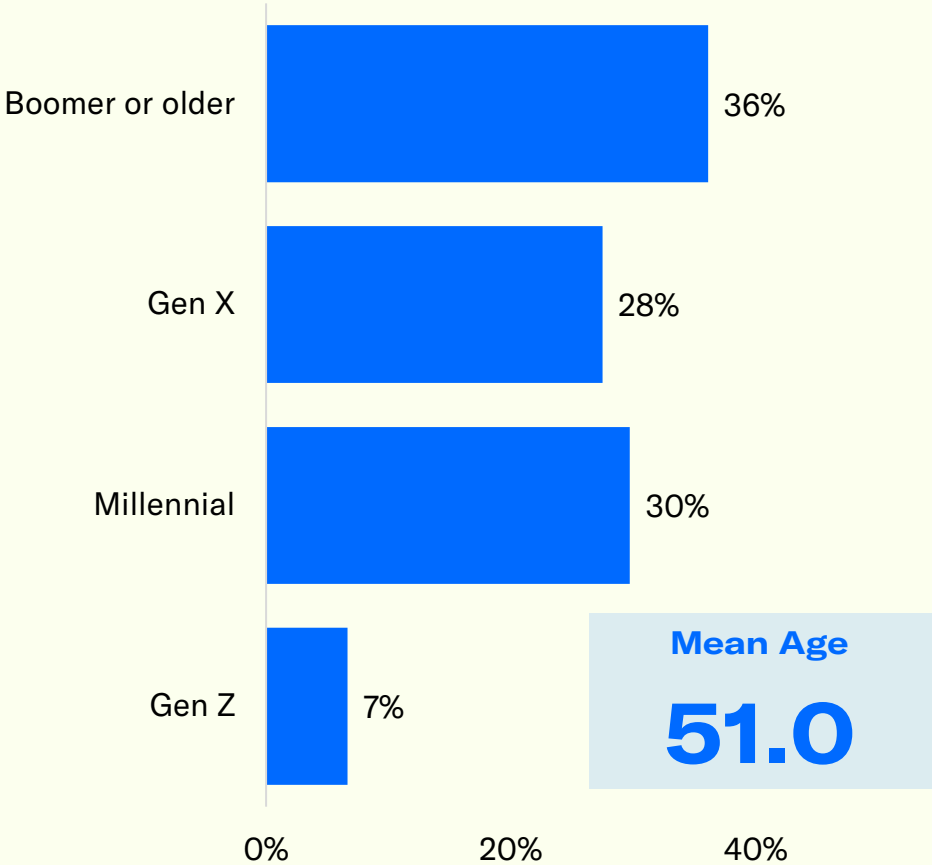
	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Female	56%	53%	57%	67%	57%
Male	44%	47%	43%	33%	43%
Base	534	302	141	91	234

Question: What is your gender?

Base: Total respondents.

Demographics

Generations



By Segment

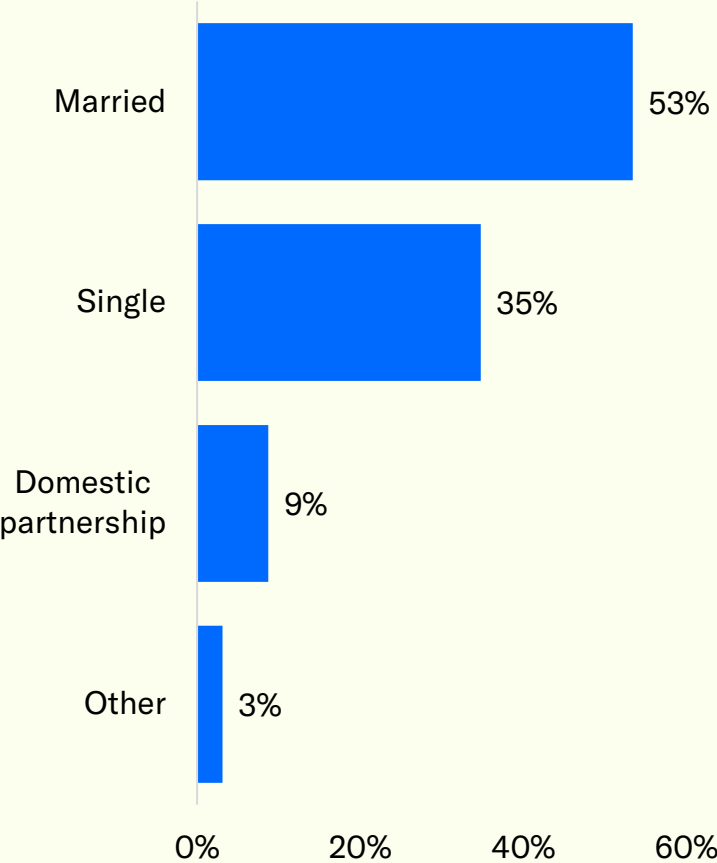
	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Boomer or older	36%	35%	45%	25%	43%
Gen X	28%	27%	27%	31%	26%
Millennial	30%	32%	25%	30%	26%
Gen Z	7%	6%	3%	14%	5%
Mean Age	51.0	50.5	55.0	46.7	53.8
Base	534	302	141	91	234

Question: In what year were you born?

Base: Total respondents.

Demographics

Gender



By Segment

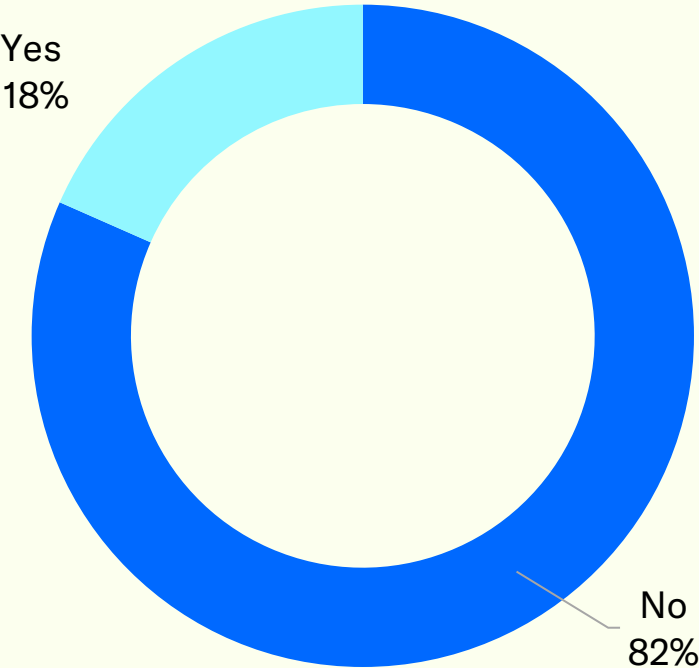
	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Married	53%	60%	44%	47%	53%
Single	35%	30%	41%	40%	36%
Domestic partnership	9%	8%	9%	10%	8%
Other	3%	2%	6%	3%	3%
Base	534	302	141	91	234

Question: Which best describes your marital status?

Base: Total respondents.

Demographics

Children in the Household



By Segment

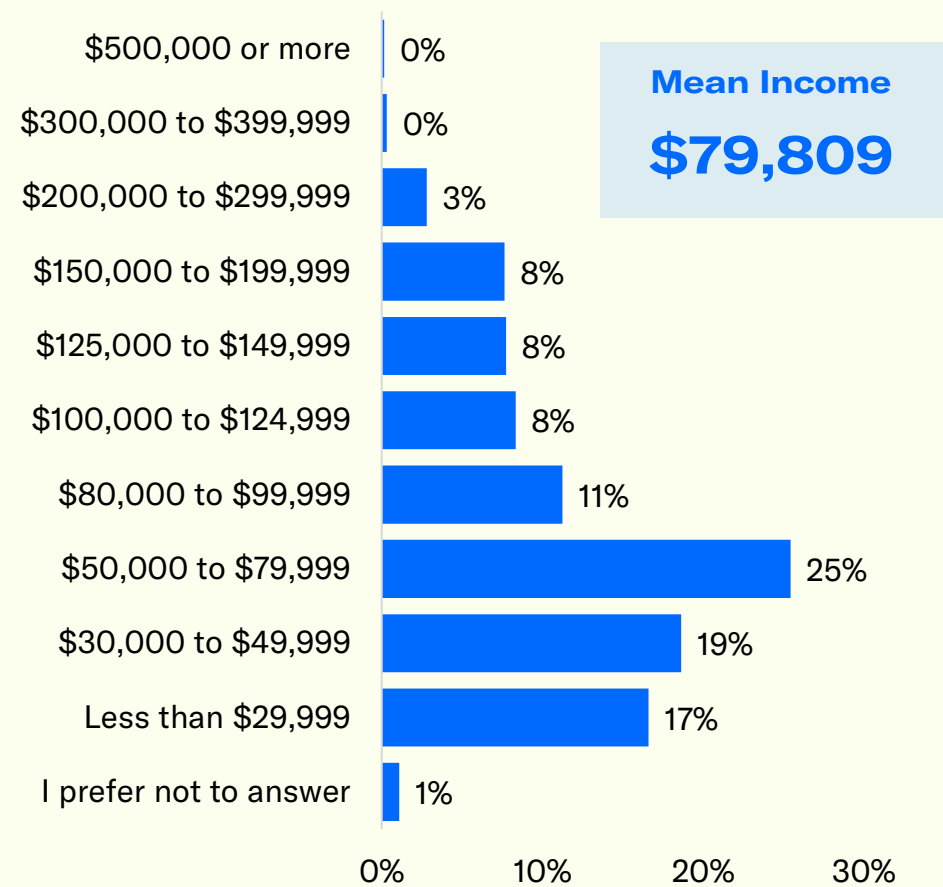
	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Yes	18%	19%	18%	18%	18%
No	82%	81%	82%	82%	82%
Base	534	302	141	91	234

Question: Which best describes your marital status?

Base: Total respondents.

Demographics

Annual Household Income



By Segment

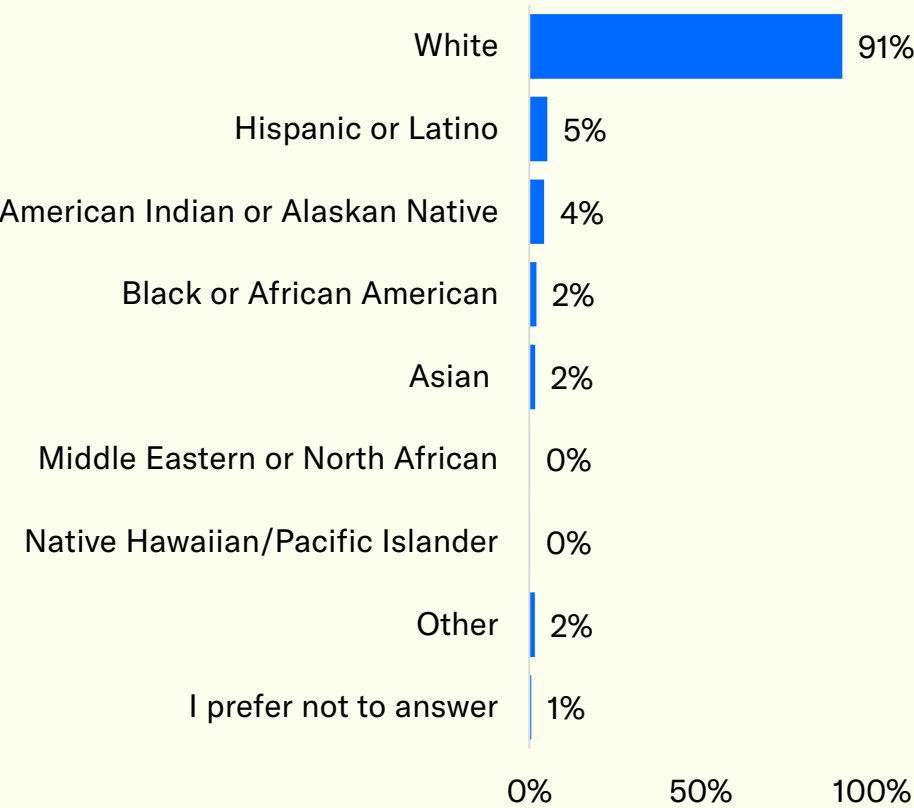
	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
\$500,000 or more	0%	0%	1%	0%	0%
\$300,000 to \$399,999	0%	1%	0%	0%	0%
\$200,000 to \$299,999	3%	4%	1%	1%	4%
\$150,000 to \$199,999	8%	9%	6%	4%	6%
\$125,000 to \$149,999	8%	10%	5%	6%	7%
\$100,000 to \$124,999	8%	10%	6%	8%	7%
\$80,000 to \$99,999	11%	11%	11%	12%	13%
\$50,000 to \$79,999	25%	24%	31%	20%	25%
\$30,000 to \$49,999	19%	17%	22%	20%	18%
Less than \$29,999	17%	13%	17%	29%	18%
I prefer not to answer	1%	2%	0%	0%	3%
Mean	\$79,809	\$88,467	\$71,879	\$62,936	\$77,718
Base	534	302	141	91	234

Question: Which best describes the combined annual income of all members of your household?

Base: Total respondents.

Demographics

Race/Ethnicity



By Segment

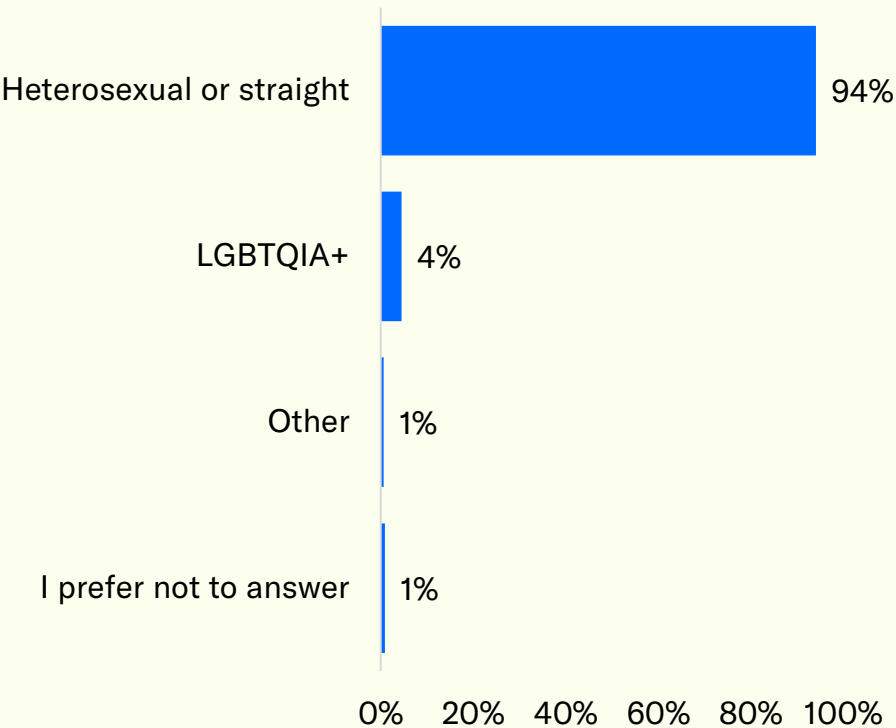
	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
White	91%	91%	92%	93%	90%
Hispanic or Latino	5%	6%	4%	3%	5%
American Indian or Alaskan Native	4%	4%	5%	3%	7%
Black or African American	2%	2%	2%	3%	2%
Asian	2%	2%	2%	1%	2%
Middle Eastern or North African	0%	0%	0%	0%	1%
Native Hawaiian/Pacific Islander	0%	0%	0%	0%	1%
Other	2%	2%	0%	1%	2%
I prefer not to answer	1%	1%	0%	0%	1%
Base	534	302	141	91	234

Question: What is your race and/or ethnicity? Select all that apply.

Base: Total respondents.

Demographics

Orientation



By Segment

	Total	Recent Visitors	Lapsed Visitors	Never Been	Montana Residents
Heterosexual or straight	94%	93%	94%	97%	93%
LGBTQIA+	4%	5%	4%	3%	4%
Other	1%	0%	2%	0%	1%
I prefer not to answer	1%	2%	0%	0%	2%
Base	534	302	141	91	234

Question: Do you consider yourself...

Base: Total respondents.