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### Revisiting Market Segments based on "What Attracted Visitors to Montana"

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# Revisiting Market Segments based on “What Attracted Visitors to Montana”

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2015 Nonresident Survey Data Mining

Norma Nickerson, Ph.D. and Jake Jorgenson, Ph.D. Candidate

9/2/2015



This report compares similarities and differences between the 1999 and 2013 market segments produced from the ITRR nonresident survey data.

# Revisiting Market Segments based on “What Attracted Visitors to Montana”

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# Revisiting Market Segments based on “What Attracted Visitors to Montana”

2015

## Abstract

Destination branding has risen in popularity since place branding has proven beneficial for states, cities, and countries looking to position themselves away from competition. In 1999, nonresident visitors to Montana were segmented based on what attracted them to the state and compared against one another resulting in the article “Branding a state from features to positioning: Making it simple” in the *Journal of Vacation Marketing*. Since then, a statewide branding initiative was developed and implemented providing the state with a cohesive message for stakeholders. This study revisits the segmentation process from pre-brand visitors with those who recently traveled to the state. Modified or added variables between 1999 and 2013 make direct comparisons difficult but still produced useful information. Results indicate that post-brand visitors to the state spend a significantly higher amount of money and spend more nights than prior to the branding initiative. Furthermore, there are significant differences in trip planning and demographics between post-brand segments. Marketing implications are discussed.

## Executive summary

A comparison of market segments between 1999 and 2013 nonresident data based on what attracted visitors to Montana revealed some similarities and many differences in the visitor segments including:

- In 2013 the National Park market segment was 44% of all visitors while in 1999 the Parks Only segment was 39% of visitors; History-based segment in 2013 represented 2% of visitors compared to 9% in 1999; the 2013 Activity-based segment represented 12% of visitors but 10% in 1999; the 2013 Landscape-based segment was 23% of visitors and 21% for the similar 1999 segment of Parks & Outdoors. Two segments in 2013 emerged that did not exist in 1999 (Friends & Family – 16% and Special Events – 4%). In 1999 the Ideal MT segment represented 12% of visitors and was not replicated in 2013.
- There were significant differences between pre-trip planning information sources as well as information sources used while in Montana between 1999 and 2013 mostly reflecting advances in the internet and online information.
- The 2013 visitor segments generally spent more time and more money while in the state even after inflation-adjusted data. The Activity-based 2013 segment (\$2,988) and the Friends & Family segment (\$1,440) had the highest total trip spending followed by the National Park segment (\$1,044) and the Landscape-based segment (\$1,330). The only segment that decreased in volume and spending in 2013 compared to 1999 was the History-based segment.
- Significant differences in 2013 demographic segments included Activity-based showing the highest income earners who are predominantly male and the second oldest group (59 years old) compared to the Special Events group who was most likely to be female, 52 years of age, and earning less than \$50K.
- The 2013 post-brand segments appear to be a successful result of the branding initiative of 2008. These indirect comparisons between pre and post brand show significant differences in the visitor to Montana.

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## Introduction

For 20 years the Montana Nonresident Visitor Survey had been conducted every 3-5 years producing quantitative results about visitor characteristics, spending, demographics, trip planning, activity choices and attractions to the state. Beginning in 2009 the study became an ongoing research project. Results of this ongoing research are available at: [www.tourismresearchmt.org](http://www.tourismresearchmt.org). This data begins with Quarter 3 of 2009 and is updated every quarter for interested parties to run their own data analysis on numerous variables. Multivariate analysis of the data, however, is not possible, hence the need for further examination to answer certain questions. This report, produced at the request of the Tourism Advisory Council, compares the results published in the article “Branding a state from features to positioning: Making it simple, in the *Journal of Vacation Marketing* (Nickerson and Moisey, 1999) to current nonresident data (the 1999 article can be accessed through this link:

[http://www.researchgate.net/publication/247764410\\_Branding\\_a\\_state\\_from\\_features\\_to\\_positioning\\_Making\\_it\\_simple](http://www.researchgate.net/publication/247764410_Branding_a_state_from_features_to_positioning_Making_it_simple)).

In that 1999 article, nonresident visitors to Montana were segmented based on what attracted them to the state and compared against one another with results showing differences in visitor segments on a number of variables including spending, socio-demographics, and trip planning. Since the publication of those results, a statewide branding initiative was developed and implemented providing the state with a cohesive message for stakeholders. This study repeats the segmentation process from pre-brand visitors to those who recently traveled to the state.

## Purpose

The purpose of this report was to conduct a segmentation analysis of current nonresident visitors to Montana and compare the results to the 1999 published data. An additional purpose was to look at differences in visitors with the recent segmentation analysis. There are two main research questions:

1. Are there differences in the type of market segments based on attractions to Montana between pre and post brand visitors?
2. Are there differences between visitor segments in the current nonresident data?

## Methods

For both the 1999 and 2013 data sets, nine to ten surveyors around Montana intercepted nonresident travelers at rest areas, gas stations, and airports; neutral sites for all travelers. Two types of questionnaires were administered during the intercept: a brief on-site questionnaire, and a mail-back questionnaire given to the respondent to return after their trip. The on-site questions were limited to travel party size, purpose for visiting Montana, visitor expenditures, limited trip characteristics (nights spent in the state), and demographics. The mail-back survey contained more in-depth questions including attractions, sources used in planning, and travel routes among others.

# Revisiting Market Segments based on “What Attracted Visitors to Montana” **2015**

To develop segments, only respondents on vacation or pleasure and only those intercepted during the months of June, July, August, and September were used in the analysis to mirror the time frame of the Nickerson and Moisey (1999) study. Visitor spending data was collected on-site and only represents the visitor’s spending in the previous day to avoid recall bias. Visitors who had not spent at least one night in Montana were asked to state their expenditures for the past 24 hours in Montana. Outliers and extraneous spending values were identified and removed when necessary. Furthermore, spending figures from Nickerson and Moisey (1999) were inflated to current dollar values to compare spending in the pre and post branding initiative. The results section displays findings to the research questions first, followed by the discussion between the current study and the Nickerson and Moisey (1999) study.

## Survey design and limitations

The overall design of the survey has remained the same between 1999 and the 2013 data years used for this report. Response sets for some of the questions have evolved over the years and are less comparable. For example, the information sources used has changed dramatically limiting the ability to directly compare those results. In addition, six of the attractions listed in 2013 had slight name changes from 1999, and in 2013 six more attractions were listed for the visitors to choose from in their response. These name changes could make a difference in how the respondent answered the questions; therefore direct comparability is difficult in this analysis. Below are the six variables that differed slightly between the two years. As one can see, there may be different interpretations by the respondents based on the word choice. These modifications could have then placed the variable in a different market segment during the analysis.

**Table 1: Variables with different wording**

<u>2013 word choice</u>		<u>1999 word choice</u>
Mountains/forests	→	Mountains
Open space/uncrowded areas	→	Open space
Wildlife	→	Viewing Wildlife
Native American history & culture	→	Native American culture
Other Montana history & culture	→	Montana history
Northern great plains/badlands	→	Northern great plains

## Response rate

No follow-up techniques were used to encourage visitors to return their mail-back questionnaires in 2013 except for a lottery-style incentive. Response rate for the 2013 onsite study was 94 percent (N=11,379). Response rate for the mail-back survey was 29 percent (N=3,241). In comparison, Nickerson and Moisey’s (1999) study achieved a mail-back response rate of 45 percent. However, the response rate in our current study can only be calculated for the full-year of data collection, which makes comparison difficult.

# Revisiting Market Segments based on “What Attracted Visitors to Montana” 2015

## Results

The variable used to construct segment clusters was: “If you indicated vacation/recreation/pleasure in question 1 above, what attracted you to Montana? (Please “X” all that apply).” Respondents were asked to select the attributes that attracted them to the state. Of those chosen, a primary attraction was then selected by the respondent. In the 2013 data, seventeen attractions had enough sample size to include in the analysis compared to 12 in the 1999 data. Table 1 shows the percent of each sample responding to “all attractions” and then the “primary attraction” which represents the main attraction to Montana from their list of all attractions. Due to sample size constraints, not all attraction variables could be included in the analysis.

Visual inspection of Table 1 between the two years shows that the pattern of features that drew visitors to Montana in 1999 are the same features that attracted them in 2013. Yellowstone, Glacier, and mountains topped the primary list for both years. In the “All attractions” list, the percent who responded to each attraction changed between the years but the overall list from most to least basically remained the same.

Traveler segments for 2013 were identified using pairwise correlations and face validity on their primary attraction. The correlation matrix identified six distinct segments with moderate correlations that had high face validity. The identified attraction segments were: 1) National Parks, 2) Friends & Family, 3) Activity-based, 4) History-based, 5) Landscape-based, and 6) Special Events. While these newly formed segments do not directly align with the Nickerson and Moisey study (1999), they possess many shared similarities and were deemed appropriate to move forward with the analysis. Visitors who were attracted by the national parks represented the largest segment (n=596) with History-based visitors representing the smallest (n=32).

To clarify the make-up of the segments it should be noted that the names of the 2013 segments represent the primary attraction whereas the names in 1999 reflect the overall picture of the segment (i.e. Active Image means those visitors were attracted to everything in MT while the Parks Only segment were just here for parks with mountains included). In other words, the 2013 visitors who indicated they were primarily attracted to either Glacier or Yellowstone were placed in the National Parks segment. All other attractions within that National Park segment are also listed, but those were not the primary attraction. The same goes for each segment. The History based attraction included visitors who primarily selected Lewis & Clark history, Native American culture or Other Montana history. Activity-based segment included visitors who primarily selected fishing, hunting, or wildlife. Landscape-based visitors selected mountains/forest, open space/uncrowded areas, rivers or lakes as their primary attraction. Friend & Family segment were people who said their primary attraction was friends/family, meaning they came to Montana to meet up with friends or family, or they came to Montana to visit friends/family living in the state. Finally the Special Events segment are those visitors who selected special events as their primary attraction which means they came to Montana for a specific event which includes anything from the Dragon Boat races in Kalispell to the MT Folk Festival in Butte to a sports event in Billings.



# Revisiting Market Segments based on “What Attracted Visitors to Montana” 2015

**Table 2 – Comparison of 1999 vs 2013 Nonresident Attractions to Montana: All Attractions and Primary Attractions**

<b>All Attractions to Montana</b>	<b>2013</b>	<b>1999</b>	<b>Primary Attraction</b>	<b>2013</b>	<b>1999</b>
	<b>%</b>	<b>%</b>		<b>%</b>	<b>%</b>
Mountains/forests (mountains)*	65	65	Yellowstone National Park	32	23
Yellowstone National Park	62	51	Glacier National Park	16	26
Rivers	49	45	Mountains/forests	15	11
Open space/uncrowded areas (open space)	44	40	Family/friends (friendly people)	12	2
Wildlife (Viewing Wildlife)	43	36	Open space/uncrowded areas (open space)	8	5
Lakes	37	34	Fishing	7	6
Special events	12	N/A	Special events	5	N/A
Glacier National Park	33	41	Resort/guest ranch	2	N/A
Family/friends (friendly people)	29	22	Lewis & Clark history	2	N/A
Fishing	25	17	Other Montana history & culture (Montana history)	1	1
Lewis & Clark history	15	N/A	Wildlife (Viewing Wildlife)	1	1
Native American history & culture (Native American culture)	13	13	Lakes	<1	1
Other Montana history & culture (Montana history)	13	14	Skiing/snowboarding	<1	N/A
A Montana State Park (State park)	7	8	Hunting	<1	N/A
Northern great plains/badlands (Northern great plains)	5	7	Rivers	0	1
Hunting	5	N/A	Native American history & culture (Native American culture)	0	0
Resort/guest ranch	4	N/A	A Montana State Park (State park)	0	0
Skiing/snowboarding	4	N/A	Northern great plains/badlands (Northern great plains)	0	0
Snowmobiling	2	N/A	Snowmobiling	0	N/A

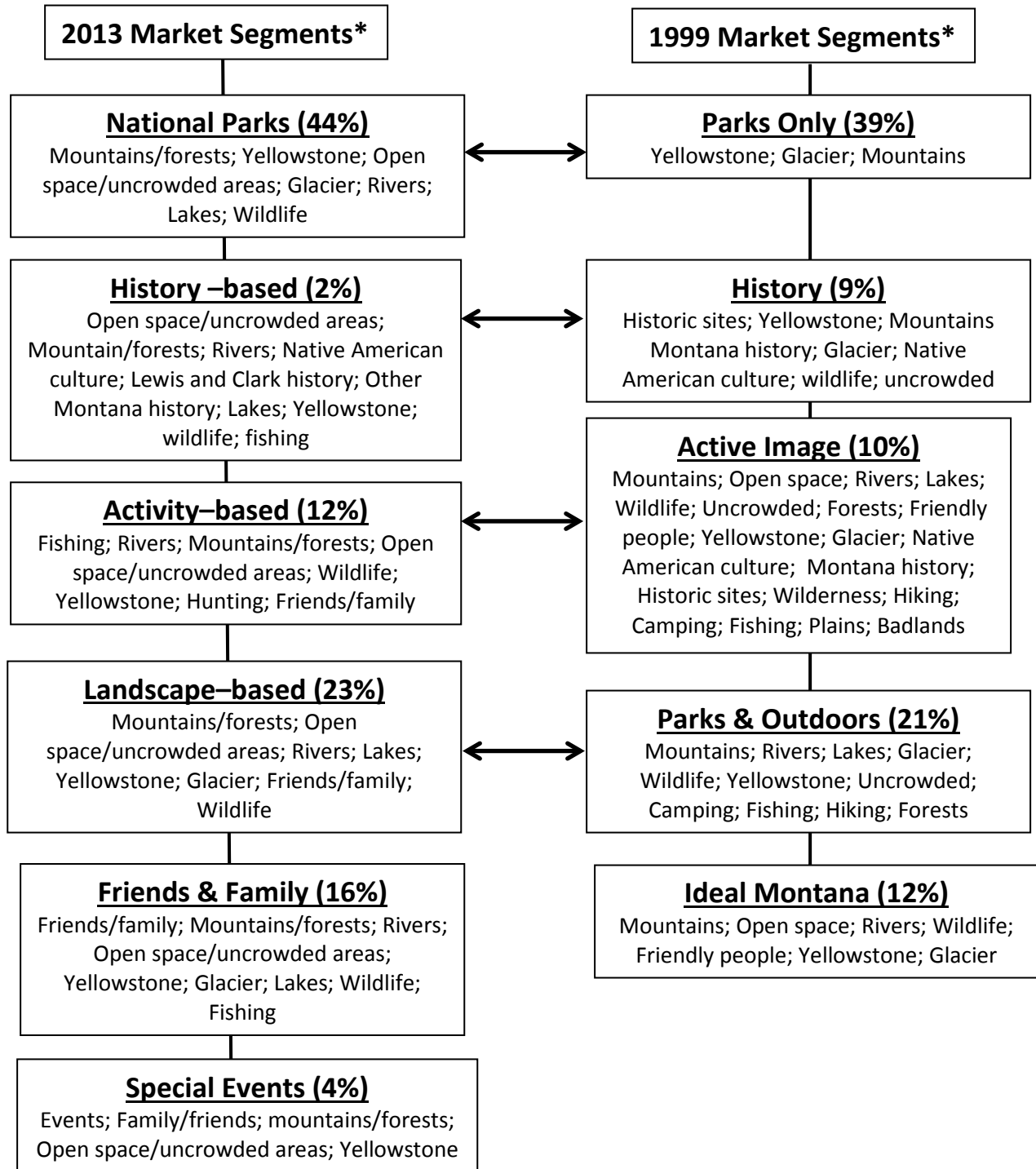
\*The parenthesis after the attraction is the 1999 wording which differed from the 2013 wording

To further understand the segments, Figure 1 compares the variables within each segment in both years of analysis. In 1999 there were five distinct market segments compared to seven in 2013. The attractions within each segment box in Figure 1 are listed in order of the highest percent of visitors who said that attraction down to twenty percent who said that particular attraction with each segment.

Another way to look at the attraction segments is shown in Figure 2 for the 1999 visitors and Figure 3 for the 2013 visitors. These graphs show where each segment and the variables interact.

# Revisiting Market Segments based on “What Attracted Visitors to Montana” 2015

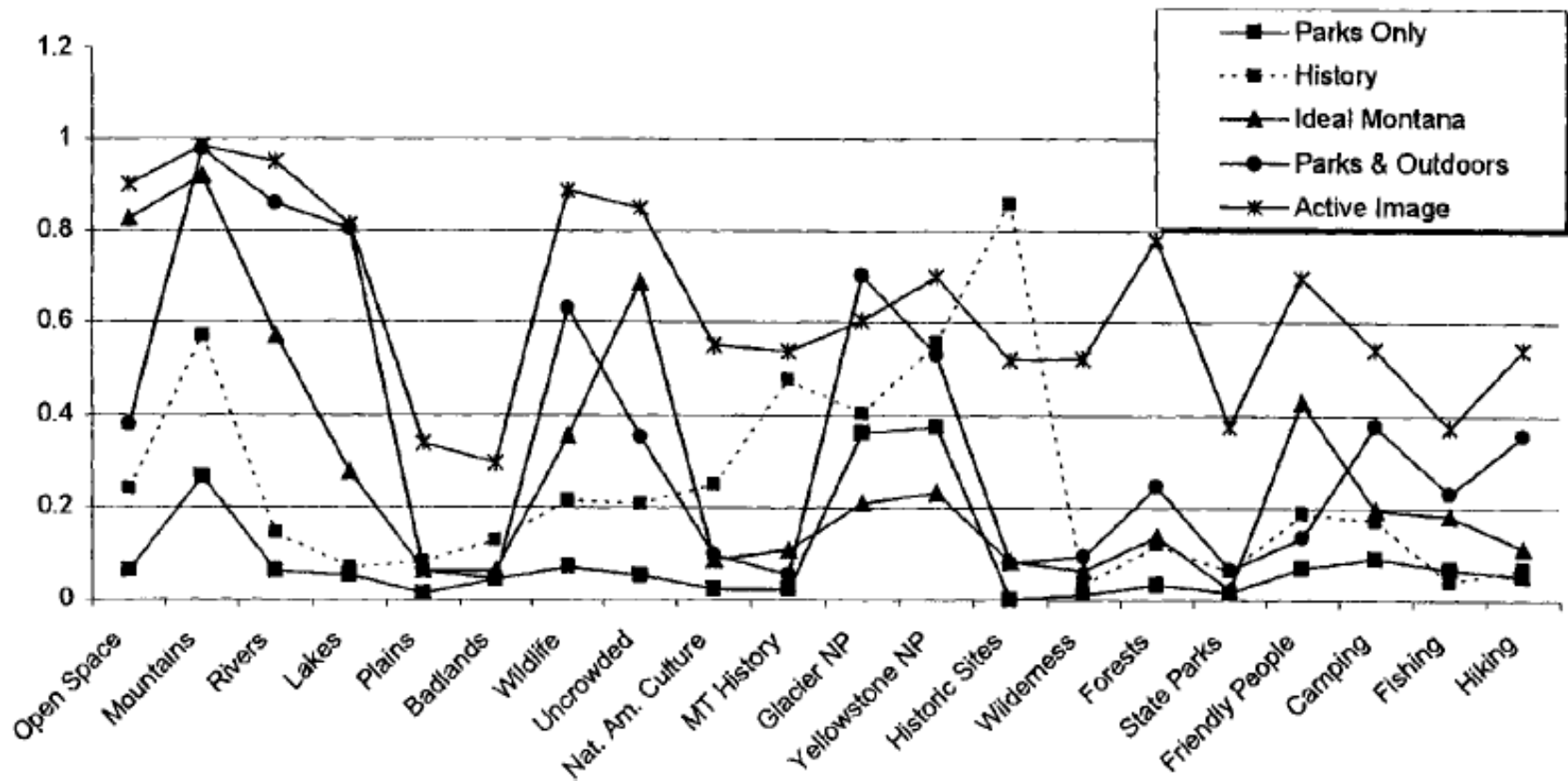
Figure 1: 2013 and 1999 Attractions within each Market Segment



\*The list within each segment is in order of magnitude of responses.

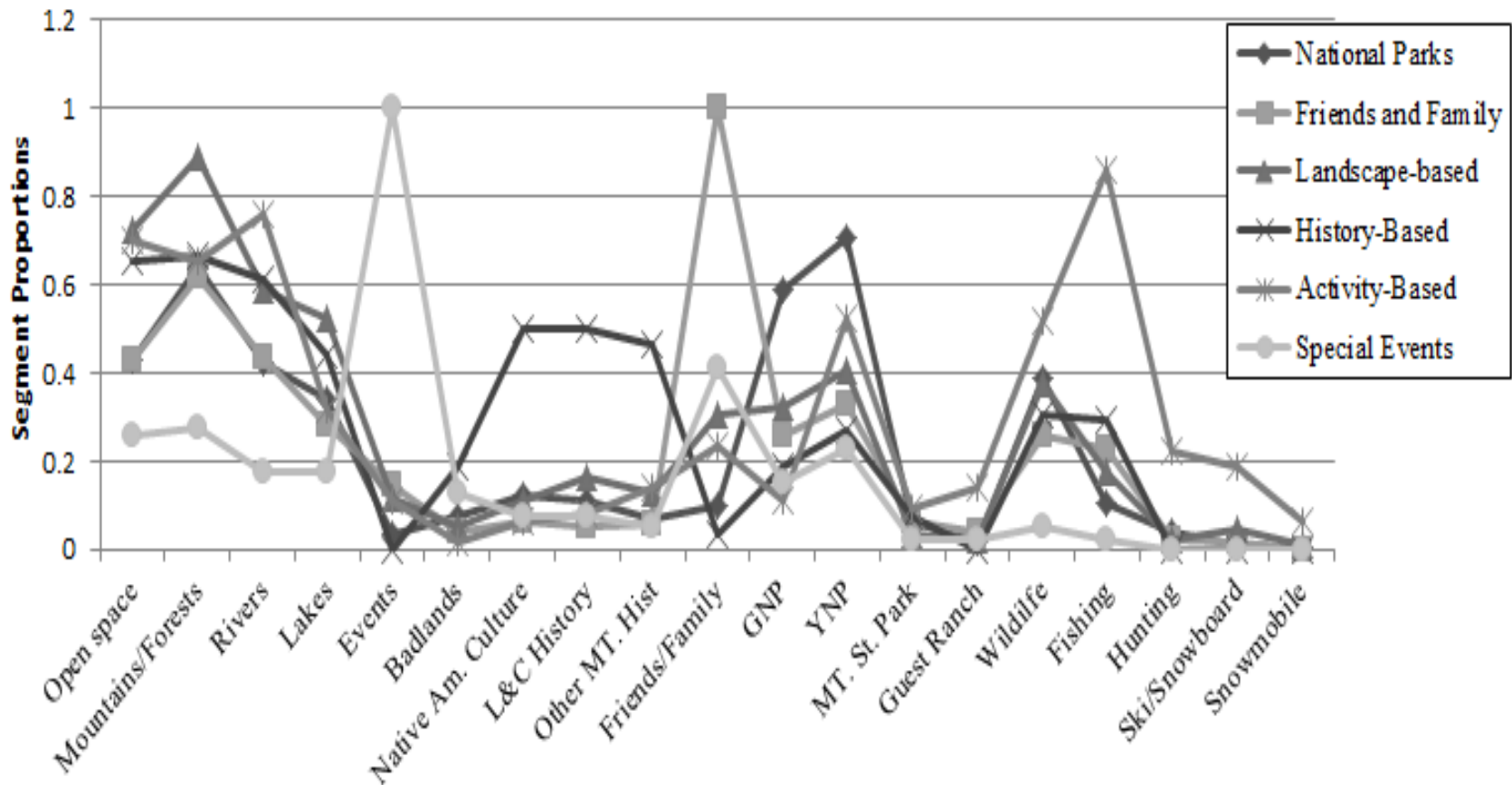
# Revisiting Market Segments based on “What Attracted Visitors to Montana” 2015

Figure 2: 1999 Nonresident Visitor Segments and Average Attraction Score



# Revisiting Market Segments based on “What Attracted Visitors to Montana” 2015

Figure 3: 2013 Nonresident Visitor Segments and Average Attraction Score



# Revisiting Market Segments based on “What Attracted Visitors to Montana” 2015

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Results displayed in Table 2 present the proportions of pre-trip planning segments used by the market segments for both years of analysis. This section of the survey instrument is quite different between the two years mostly because of the rise in internet and online resources. As expected, these results cannot be directly compared with pre-brand visitors, but the side-by-side visuals are still displayed. Comparable segments are similarly shaded in Table 2, e.g. the first two columns of gray are comparable segments and the next two white columns are comparable and so forth. The green column is a 1999 segment without a comparable 2013 segment and the two yellow columns at the end are 2013 segments not comparable to 1999 segments. In other words, the last three columns stand alone.

Respondents were asked to select all the planning sources they used prior to their visit to Montana and then asked to select the one primary source from their choices. In general, the option of “no sources used” represented the highest or second highest selections by four of the six segments in 2013 but one of the lowest sources by visitors in 1999. It is unclear why there is such a significant difference between the two years.

It is obvious that the internet has changed pre-trip planning source use. In 1999, automobile clubs and guide books were the primary pre-trip sources. In 2013, search engines (Internet) was the top source for four of the six segments with the Activity-based segment and the Friends & Family segment saying they used no sources as their top choice. Only the National Parks segment and the History-based segment in 2013 used another source for pre-trip planning; national park brochure/book/ website.

To complement pre-trip planning, Table 3 displays results of the sources travelers used *while* on vacation in Montana by attraction segment. Similar to pre-trip planning, there is a split of the types of material used while traveling in the state. In 2013, map applications, mobile apps, and visitor information center staff saw high proportions of use by all segments. Interestingly the Landscape-based segment used the brochure rack information as their second highest information source distinguishing themselves from the other segments. The Special Events segment also differed in that an employee in a motel/restaurant/gas station had the highest used source of information while on their trip in 2013.

In 1999 a person in an information center or a private business were the top two choices of sources in each segment except Ideal MT which used the person in a private business and highway information signs as its top two. Smart phones and mobile apps were not even available to the public at that time.

While online sources are popular with today’s visitors while in Montana, there is a definite need to ensure that personnel (staffed visitor centers and informed private business employees) are available for assisting travelers.

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**Table 3: Primary Pre-Trip Planning Information uses by Market Segment: 2013 & 1999**

	2013	1999	2013	1999	2013	1999	2013	1999	1999	2013	2013
<b>Information Source List</b> (*The parenthesis in the source list is the 1999 wording which differed from the 2013 wording.)	Nat'l Parks (44%)	Parks only (39%)	Activity-based (12%)	Active image (10%)	History-based (2%)	History (9%)	Landscape-based (23%)	Parks & outdoors (21%)	Ideal MT (21%)	Friends & Family (16%)	Special events (4%)
<b>Used no sources</b>	6.8%	2.0%	28.9%	2.6%	9.7%	2.1%	19.3%	1.3%	2.6%	34.4%	20.7%
<b>MT. State Travel Website</b>	5.3%	N/A	6.5%	N/A	9.7%	N/A	3.7%	N/A	N/A	2.5%	0.0%
<b>Search Engine (Internet)</b>	24.9%	3.1%	19.9%	2.0%	22.6%	1.7%	33.9%	2.1%	3.5%	21.6%	27.6%
<b>Mobile App.</b>	0.8%	N/A	0.5%	N/A	12.9%	N/A	1.8%	N/A	N/A	1.2%	0.0%
<b>Online Videos</b>	0.8%	N/A	0.5%	N/A	0.0%	N/A	0.0%	N/A	N/A	0.4%	0.0%
<b>Other Travel Websites</b>	1.9%	N/A	2.0%	N/A	3.2%	N/A	1.8%	N/A	N/A	4.6%	0.0%
<b>Consumer online reviews</b>	2.5%	N/A	1.0%	N/A	3.2%	N/A	1.8%	N/A	N/A	0.8%	0.0%
<b>Professional online reviews</b>	0.3%	N/A	1.0%	N/A	0.0%	N/A	0.0%	N/A	N/A	1.2%	0.0%
<b>Social Media</b>	0.3%	N/A	1.0%	N/A	0.0%	N/A	0.0%	N/A	N/A	1.2%	0.0%
<b>Automobile club</b>	6.8%	41.2%	0.5%	30.5%	6.5%	34.4%	4.6%	32.7%	33.5%	2.1%	0.0%
<b>Chamber/visitor bureau (local information center)</b>	3.1%	3.2%	0.0%	9.2%	3.2%	7.6%	1.8%	4.4%	5.7%	0.4%	10.3%
<b>Montana advertising Campaign</b>	0.3%	N/A	0.0%	N/A	0.0%	N/A	0.9%	N/A	N/A	0.0%	0.0%
<b>Official MT guidebook (state travel brochure)</b>	1.9%	9.3%	4.5%	14.4%	3.2%	16.2%	3.7%	15.6%	14.5%	2.9%	0.0%
<b>Magazine/newspaper article</b>	0.3%	N/A	1.0%	N/A	0.0%	N/A	0.9%	N/A	N/A	0.8%	1.7%
<b>National Park brochure/book/ website (national park brochure)</b>	24.0%	12.6%	13.2%	10.2%	19.4%	7.2%	6.4%	14.1%	7.5%	3.3%	5.2%
<b>State Park brochure/website (state park brochure)</b>	0.5%	0.9%	0.7%	1.6%	0.0%	0.3%	0.0%	1.4%	0.7%	2.1%	5.2%
<b>Guide book</b>	8.4%	19.2%	4.3%	22.3%	0.0%	19.9%	4.6%	17.3%	18.9%	0.4%	0.0%
<b>Info. from private businesses</b>	0.9%	4.4%	2.2%	4.3%	0.0%	3.8%	0.9%	3.8%	7.7%	0.8%	1.7%
<b>Information from special events</b>	0.2%	N/A	1.2%	N/A	0.0%	N/A	0.9%	N/A	N/A	2.1%	13.8%
<b>Other</b>	8.4%	N/A	10.0%	N/A	6.5%	N/A	12.8%	N/A	N/A	12.9%	13.8%
<b>State travel info via telephone</b>	N/A	3.9%	N/A	2.6%	N/A	6.2%	N/A	6.7%	4.2%	N/A	N/A
<b>Regional travel info via telephone</b>	N/A	0.1%	N/A	0.3%	N/A	0.0%	N/A	0.6%	0.7%	N/A	N/A
<b>Travel Show</b>	N/A	0.1%	N/A	0.0%	N/A	0.7%	N/A	0.0%	0.0%	N/A	N/A

# Revisiting Market Segments based on “What Attracted Visitors to Montana” 2015

**Table 4: Primary Planning Information used while in Montana by Market Segment: 2013 & 1999**

	2013	1999	2013	1999	2013	1999	2013	1999		1999	2013	2013
<b>Information Source List</b> (*The parenthesis in the source list is the 1999 wording which differed from the 2013 wording.)	Nat'l Parks (44%)	Parks only (39%)	Activity-based (12%)	Active image (10%)	History-based (2%)	History (9%)	Landscape-based (23%)	Parks & outdoors (21%)		Ideal MT (21%)	Friends & Family (16%)	Special events (4%)
<b>MT. State Travel Website</b>	3.4%	N/A	6.6%	N/A	4.0%	N/A	3.9%	N/A		N/A	1.6%	6.3%
<b>Mobile App.</b>	10.4%	N/A	16.3%	N/A	20.0%	N/A	9.1%	N/A		N/A	13.5%	18.8%
<b>Consumer online reviews</b>	6.4%	N/A	4.4%	N/A	0.0%	N/A	3.2%	N/A		N/A	2.6%	2.1%
<b>Social Media</b>	1.0%	N/A	1.7%	N/A	0.0%	N/A	2.1%	N/A		N/A	3.1%	2.1%
<b>Official MT guidebook</b>	4.5%	N/A	3.8%	N/A	8.0%	N/A	4.9%	N/A		N/A	3.6%	0.0%
<b>Guidebooks</b>	6.5%	N/A	4.2%	N/A	0.0%	N/A	2.8%	N/A		N/A	0.5%	6.3%
<b>Map Applications</b>	15.3%	N/A	20.6%	N/A	20.0%	N/A	22.1%	N/A		N/A	28.6%	14.6%
<b>Visitor information center staff (person in information center)</b>	29.6%	23.3%	19.7%	25.7%	20.0%	28.0%	13.3%	31.7%		16.0%	12.5%	8.3%
<b>Motel/restaurant/gas station employee (person in private business)</b>	8.6%	23.9%	10.8%	19.8%	4.0%	19.3%	13.0%	21.3%		27.3%	8.9%	20.8%
<b>Brochure information rack (brochure rack)</b>	9.4%	15.8%	10.8%	18.0%	12.0%	22.45	15.1%	13.9%		16.9%	10.9%	16.7%
<b>Official highway information signs (highway info signs)</b>	4.0%	17.7%	7.0%	16.4%	8.0%	11.8%	8.4%	17.0%		20.0%	11.5%	4.2%
<b>Billboards (business billboard)</b>	1.0%	1.1%	1.5%	0.3%	4.0%	1.9%	2.1%	0.4%		2.6%	2.6%	0.0%
<b>Computer info center</b>	N/A	0.1%	N/A	0.3%	N/A	0.3%	N/A	0.0%		0.0%	N/A	N/A
<b>Other</b>	N/A	18.1%	N/A	19.6%	N/A	16.5%	N/A	15.7%		17.2%	N/A	N/A



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A final comparison between 2013 and 1999 is shown in Table 5 which identifies the length of stay by segment and spending patterns (daily and trip) by segment. The 1999 dollars were inflated to 2013 dollars for direct comparison purposes. Perhaps because the segments between years were not completely the same, results in some segments provide interesting differences in spending and length of stay. For instance, there was a 69 percent increase in total trip spending by the park segments between the two years with an increase of 2.2 additional days suggesting a higher spending for this segment in 2013. The same pattern exists for the Activity-based segment in 2013 compared to the Active Image segment in 1999 (130% increase in total trip spending) and the Landscape-based segment in 2013 compared to the Parks & Outdoors segment in 1999 (31% increase in total trip spending). Interestingly however, is the decrease in the History segments from 1999 to 2013. The 2013 history segment went down in length of stay by 1.2 days and down in daily spending by \$24.30. In addition, it became a much smaller overall segment in 2013 at 2 percent of the nonresident visitation down from 9 percent in 1999.

Analyzing 2013 segments only (not comparing to 1999), we see differences in the segments based on length of stay and total trip spending (Table 6). Variables tested by the Kruskal-Wallis comparison included average nights spent in Montana (delimited to 30 total nights spent), total trip spending, and average daily spending. Significant differences emerged in the distribution of both average nights spent and total trip spending between attraction segments at the .001 level. However, there were no significant differences in average daily spending between attraction segments. In terms of average nights spent, Activity-based respondents had significantly higher mean nights (9.9 nights) than National Parks (6.4 nights), Landscape-based (6.4 nights) and Special Events (3.2 nights). No other differences were found between segments. For total trip spending the results were somewhat similar. Activity-based respondents had a higher mean trip spending (\$2,987.92) than National Parks (\$1,044.32), History-based (\$445.85), and Landscape-based (1,329.65). Due to the smaller sample size and wide variation in spending for the Special Events segment, no significant differences emerged between Activity-based and Special Events. One additional significant difference was observed at the .001 level. Family and Friends (\$1,439.97) have a significantly higher mean spending than History-based at the .001 level.

Finally, Table 7 displays 2013 demographic results for the attraction segments. The youngest mean age attraction segment was Special Events (mean = 52.39 years old), which also had the lowest income level of less than 50k by 37 percent of the respondents. The oldest attraction segment was History-based (mean = 61.14 years old), followed by the Activity-based (mean = 58.97 years old). The Activity-based segment appears to be male-dominated (74.6% males) with a high annual household income with 26 percent selecting “100k to less than 150k”. An ANOVA conducted on the mean ages of the six activity segments indicated significant differences at the .05 level. Similarly, a chi-square homogeneity test was conducted on the gender and income proportions between segments which indicated differences at the .05 level as well. Thus there was evidence of significant differences in demographics between post-brand attraction segments in 2013.



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**Table 5: Trip Length, Average Daily and Total Trip Expenditures by Market Segment: 2013 & 1999**

	2013	1999	2013	1999	2013	1999	2013	1999		1999	2013	2013
	Nat'l Parks (44%)	Parks only (39%)	Activity based (12%)	Active image (10%)	History based (2%)	History (9%)	Landscape based (23%)	Parks & outdoors (21%)		Ideal MT (21%)	Friends & Family (16%)	Special events (4%)
<b>Average Trip Length (days)</b>	6.4	4.20	9.9	7.51	4.1	5.30	6.4	6.86		7.03	7.1	3.2
<b>Average daily expenditures per group (dollars)</b>	187.06	146.96	292.70	172.56	126.29	150.59	200.55	147.95		149.68	189.68	195.22
<b>Total trip expenditures per group (dollars)</b>	1,044.32	617.21	2,987.92	1,295.95	445.85	798.11	1,329.65	1,017.90		1,052.24	1,439.97	688.63

**Table 6: Significant Differences between 2013 Market Segments**

	Average Nights Spent (nights)*	Average Daily Spending (dollars)*	Total Trip Spending (dollars)*
<b>National Parks<sup>a</sup></b>	6.4 <sup>c</sup>	187.06	1,044.32 <sup>c</sup>
<b>Friends and Family<sup>b</sup></b>	7.1	189.68	1,439.97 <sup>d</sup>
<b>Activity-based<sup>c</sup></b>	9.9 <sup>ae</sup>	292.70	2,987.92 <sup>ade</sup>
<b>History-based<sup>d</sup></b>	4.1	126.29	445.85 <sup>bc</sup>
<b>Landscape-based<sup>e</sup></b>	6.4 <sup>c</sup>	200.55	1,329.65 <sup>c</sup>
<b>Special Events<sup>f</sup></b>	3.2 <sup>c</sup>	195.22	688.63

\*Kruskal-Wallis Test: Significant at  $\alpha = .001$  level. Superscripts denote where significant differences exist between attraction segments.

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**Table 7: 2013 Market Segments - Demographic Comparison**

	<b>National Parks (n=596)</b>	<b>Activity-based (n=161)</b>	<b>History (n=32)</b>	<b>Landscape-based (n=306)</b>	<b>Friends and Family (n=213)</b>	<b>Special Events (n=50)</b>
<b>Age*</b>	53.06 Years	58.97 years	61.14 years	55.80 years	54.97 years	52.39 years
<b>Gender**</b>	51.0% Male	74.6% Male	80.8% Male	54.4% Male	51.7% Male	51.3% Female
<b>Income**</b>	24.9% \$75k-less than \$100k	25.9% \$100k-less than \$150k	45.8% \$50k-less than \$75k	29.7% \$50k-less than \$75k	27.2% \$75k-less than \$100k	37.1% Less than \$50k

\*ANOVA test: Significant at  $\alpha = .005$  level.

\*\*Chi-square significant at  $\alpha = .05$  level.

### Conclusions & Recommendations

Results from this study show interesting insights into the possible effect of a statewide brand initiative. While a direct, statistical comparison to Nickerson and Moisey’s (1999) study was not appropriate, there does appear to be some changes in the types of visitors frequenting the state. As discussed, segment memberships of visitors did not differ widely between pre and post brand, although variation does exist to some degree. Glacier and Yellowstone National Parks still attract the largest group of nonresident travelers to Montana, but they are not the only draw. Montana’s landscape features are either a primary or secondary interest to almost all visitors. The inclusion of the Friends & Family and Special Events segments are a departure from the pre-brand segments, but represent a potential new niche in the traveler demographics of Montana’s visitors. Montana appears to have more that entices travelers than its natural landscape features, yet, it will still be known primarily for its parks and outdoor recreation. Overall the identified post-brand segments are not a substantial departure since brand implementation; however, segment characteristics have changed quite substantially since the brand maturity.

First, pre-and-post brand visitors appear to have varying secondary attractions with 1999 respondents seemingly more likely to check off many attractions within a segment whereas in 2013 fewer respondents avidly checked off many attractions (fewer high responses per attraction). While it is a bit unclear why that has occurred, it could mean that by 2013, visitors were more ‘in-tune’ to what attracted them to the state. Perhaps they were also able to pin-point more of what they wanted on their trip due to the high use of the internet search engines in the pre-trip planning stage. In relation to the brand pillars, highlighting Montana’s scenic and unspoiled nature appears to be successful in targeting the demographic of users that equally appreciates those characteristics. Furthermore, even if visitors come to Montana for reasons other than natural landscapes, it is still a secondary draw among many travelers.

The most telling results from the comparison of segments of post-brand visitors revolve around nights spent and total trip spending. Activity-based respondents have a significantly higher average nights spent and total trip spending than the other 2013 post-brand segments, which is important to note for promotional entities. This indicates that visitors who are primarily attracted to Montana because of a specific activity contribute well to the state’s economy. These results align with those found in Nickerson and Moisey’s (1999) article who found that the Active Image segment had significantly higher spending than other segments of Montana Travelers (\$1,295.95 per trip). Similarly, Activity-based visitors in 2013 saw a total trip spending figure of \$2,987.92 per trip. This shows a 131 percent increase in spending per trip by a harmoniously defined 1999 visitor group. As stated before, these figures cannot be statistically compared due to methodological differences and survey instrument changes, but the simple distinction between these two like groups and spending figures indicates that there may be a large change in the type of visitors who make up the activity-based segment.

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Furthermore the Activity-based segment shows that fishing was the highest activity suggesting that fishing may indeed be the reason the spending is significantly higher.

Besides the Activity-based travelers, the Friends & Family segment from our 2013 data spent more per trip (\$1,439.97) than the rest of the 2013 segments. Part of this is due to the length of stay of 7.1 nights but this is still, on the surface, a surprising finding. In retrospect, however, this segment does not mean they visited friends or family who lived in Montana (although that certainly could be part of it). Instead many people were attracted to Montana because their family or friends had chosen to visit the state and they did this as a group. Naturally when your extended family comes together in one spot there are many things to do together including a guided trip, shopping, and staying at more costly accommodations such as resorts and guest ranches.

Comparing all the total trip expenditures by segment from Nickerson and Moisey’s (1999) study and the 2013 data, something big is happening with the spending since both years represent dollars inflated to 2013. The highest spending segment from 1999 would not even rank second in total trip spending now. This appears to give more evidence that the brand and possibly the subsequent geotraveler market may have some influence in the type of traveler that frequents the state. Even taking inflation into account, visitors are spending more money today than they were prior to the brand’s implementation (except in the History-based segment). It would be inappropriate to assume that the branding initiative is completely responsible for the increase in spending and nights spent by attraction segments, but there appears to be some very positive relationship occurring here.

Looking at post-brand visitors more closely, trip planning has changed dramatically since Nickerson and Moisey’s (1999) original study. The focus has shifted from primary pre-trip planning source being automobile clubs (such as AAA) to online resources. This shift is important to consider for how visitors plan their Montana vacations, use sources, and the types of sources consulted. Visitor information center staff and national park brochures are still an important part of visitors’ planning process, but the progression of the internet has fundamentally changed the entire planning process.

Moving forward, promotional entities can use these findings to enhance marketing to the niche markets or segments found in this study. If economic viability continues to be a primary objective, Activity-based visitors may be a worthwhile niche to target. Growing Montana’s ski industry, promoting the world-class fly fishing destinations, and bringing awareness to other various outdoor activities could attract more visitors from this segment of travelers, further solidifying tourism’s contribution to the economy. Despite the ever-changing tourism market, Montana’s brand appears to be successful in attracting visitors, such as the geotraveler who benefit the local economies. While the evidence is not without some question, it certainly points to a brand initiative that has had a positive influence on the type of visitor and the number of visitors the state has experienced post-brand.