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Montana Travel Region Visitors: A Pilot Study of Gold West Country Travel Region

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Montana Travel Region Visitors – A Pilot Study of Gold West Country Travel Region

Purpose and Objectives

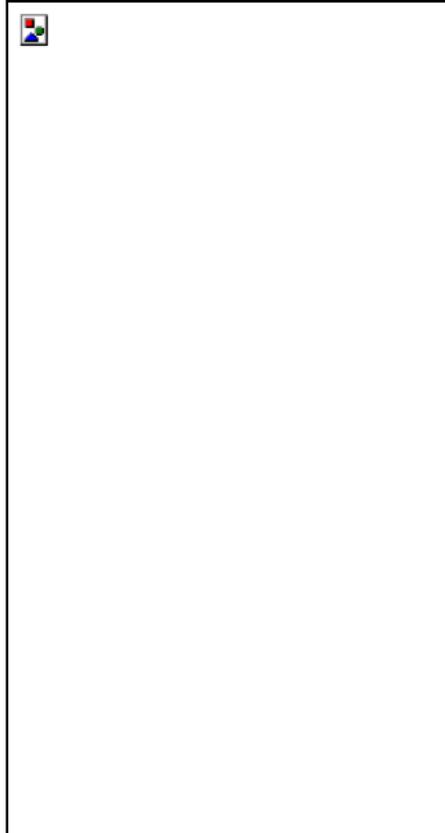
The main purpose of this project was to determine the effectiveness of an on-site regional survey for gathering information on summer visitors and their expenditure patterns. The objectives of the study were to:

- Determine the best survey instrument and methods to use at the regional level;
- Describe visitors to the region in terms of demographics, trip characteristics in the region, travel behavior in the region, visits to attractions in the region, and expenditures in the region.

Methodology

Gold West Travel Region in the south-central/south-west portion of Montana was chosen as the test region for a variety of on-site intercept surveys (figure 1). On-site interception is the best method to capture visitors to a smaller region within a state for numerous reasons. First, the regional market is a subset of the state market but that subset is unknown. Without knowledge of the sub-group, it would be an expensive and time-consuming endeavor to conduct random telephone or mail surveys to people who may or may not have been a visitor to the region. It could be compared to finding a needle in a haystack. Second, the use of addresses and/or phone numbers of people who have inquired about the region would only provide data on a group of inquirers, who are not the majority of visitors to the region. Therefore, the remaining option was to physically place a surveyor in the travel region to talk to actual visitors.

Figure 1: Gold West Country Travel Region



The second methodological decision was to determine where to intercept visitors. The Institute for Tourism and Recreation Research (ITRR) has conducted visitor intercept surveys continually since 1988. ITRR conducts statewide nonresident visitor surveys by intercepting visitors at gas stations, airports and rest areas. While this is deemed the most comprehensive method at the state level, it still does not adequately capture the day visitor. Reducing the size of the population to a region within a state, i.e. Gold West Country, would further compound the failure to capture day visitors. It is much easier to be a day visitor to a region and never stop for gas, at a rest area or at the airport, which in turn means the study would miss a large share of visitors. Therefore, based on experience, literature review, and the purpose of the study, it was determined that visitors at attractions within the region would provide the most comprehensive data for the region.

By contacting visitors at attractions in the region, the study captured visitors who were:

- Staying overnight in the region at camping areas, commercial accommodations, or at private homes;
- Not staying overnight but driving through the region and stopping at a tourist attraction;
- From other regions in Montana as well as from out-of-state, and;
- Stopping their vehicle at attractions within the region and therefore making more of an impact to the tourism industry than those who simply pass through.

The study did not capture people who were:

- Driving through the region and not stopping, and;
- Spending time in the region but not visiting tourist attractions, i.e. a person who visits a friend in the region but does not go to attractions within the region or a person who stays overnight at a hotel but does not go to attractions.

Therefore, this study became a study of visitors to attractions in Gold West Country. The mission of Gold West Country and all travel regions within the state is to entice people to visit their part of the state. To achieve this objective, travel regions will list the sites to see and places to go for the potential visitor in promotional brochures and advertisements. The places to see and visit are the reasons for coming to the area – not the restaurants, motels, and gas stations. Those businesses provide the food, shelter, and transportation or “necessary services,” while the attractions provide the “experience.” This study characterizes people who “experienced” Gold West Country.

Survey Types

Three survey types were tested in Gold West Country (Table 1).

1. A questionnaire was handed to the visitor, completed on site, and handed back to the surveyor. The questionnaire included all of the questions, including expenditures.
2. A questionnaire was handed to the visitor, completed on site, and handed back to the surveyor. The questionnaire did not include the expenditure questions. A stamped postcard with the expenditure questions was given to the visitor to complete that day and drop in a mailbox.
3. A mail-back questionnaire was handed to the visitor. The visitor was instructed to complete the questionnaire that day and drop it in the nearest mailbox.

Table 1: Methodological Analysis

	# handed out	Overall Response rate	Response rate on Expenditures	% of Expenditure categories reported which were not in region
On-site only	26	100%*	2%	0%
On-site with mail-back expenditure postcard	83	100%*	46%	13%
Mail-back	122	42%*	39%**	12%

* Refusal rate was totaled for all methods. Twelve percent of the people contacted immediately refused the survey.

Response rates, therefore, refer to those who took the survey and returned the survey.

**Some respondents mailed back the survey without completing the expenditure question.

On-Site Only Survey. This survey was tested and eliminated as a useful tool for data collection after one day of testing. As seen in Table 1 this survey only produced a 2 percent response rate to the expenditure data. The question asked the respondent to indicate what was spent in the past 24 hours. This type of question takes thought and time. The questionnaire was requiring the visitors to spend more time than they felt comfortable with so respondents simply did not answer the expenditure section.

On-Site with Mail-Back Expenditure Postcard. This survey instrument proved to be the best method for the number of surveys completed and the number of respondents who completed the expenditure information. Since the visitor did not have to think back about their expenditures for the past day, it was easy for them to keep track on the postcard like an on-going mini-diary. In fact, 21 of the recorded expenditures occurred outside the travel region, proving that the respondent did take a diary approach to this question. While 54 percent of the respondents still did not mail back the expenditure postcard, the response was better than for the complete mail-back survey. An additional benefit to this method is that even when the respondent does not mail back the expenditures, all other information about the visitor is still obtained onsite.

Mail-Back Survey. This survey instrument was the easiest for the surveyor to administer. It required a simple agreement by the visitor to complete the survey that day. Virtually no time was taken from the visitor at the site. However, even though it was simple to administer, it produced a much lower response rate than the on-site survey with the mail-back postcard. In this method, when the respondent did not return the survey, all data was lost. At least twice as many surveys would have to be handed out to receive the same number of surveys with the on-site/mail-back postcard method. An interesting observation about this method, however, is that fewer respondents wrote in expenditures from outside the region. Perhaps this group had time to read the survey directions better than the on-site/mail-back group.

Sample Sites

Twelve “attractions” within the region were identified by the researchers and the Director of Gold West Country for data collection. These sites were selected based on the following criteria: 1) geography – the entire region had to be represented; 2) visitation – the site had to have enough visitors to make the survey time worthwhile; 3) site type – a mixture of private for-profit and public attractions, and; 4) permission – the site owner/manager had to agree to participate. A brief description of the sites used in the study follows:

- Bannack State Park is a ghost town located just west of Dillon, Montana. All but one of the people asked to participate were willing to do so. The relaxed atmosphere of this attraction seemed to encourage participation.
- Dillon Visitor Center/Chamber of Commerce is located in Dillon. Most people who came to the chamber were looking for information while some were there to look at the Lewis and Clark diorama. This is a slow spot for intercepting visitors, (the most likely time to find visitors is between 11:00 am- 3:00 pm) but there are nice seats for people to sit and fill out the survey. There was only one refusal at this site.
- Last Chance Tours is located in Helena next to the Historical Society Museum. People can sit on the train and fill out a survey while waiting for the tour to start. The disadvantage to this site is that train tours are given at the beginning of each hour and people don't come to the train until right before the train departs, leaving the rest of the hour with no one to intercept. Three people refused surveys at this site.
- The Montana Historical Society is located across the street from the State Capitol and adjacent to where the Last Chance Tours depart in Helena. The disadvantage to conducting surveys at both the Historical Society and the Last Chance Tours is the overlap in visitors. This is a good place to survey, with a large number of visitors. Only two visitors refused to be surveyed.
- Lewis and Clark Caverns is located southeast of Whitehall. Tours, given every half-hour, allowed the surveyor to talk to the visitors while waiting in line for the tour. There were people at this site all day, and only one person refused to be surveyed.
- Old Works Golf Course had the highest number of refusals (seven). People were intercepted as they came off the course and returned their golf carts. Even though this site had people from all over the state and country, people came to play golf and did not want to be bothered. In addition, data collection could not begin before noon to allow time for the players to finish their game. Due to the refusal rate and the time restrictions on surveying, this type of site is not recommended for future data collection.
- The Old Prison Museum is located in Deer Lodge. The prison is slow until their first tour of the morning. There is a place to sit down in front of the museum to fill out surveys, making it a comfortable place in which to collect data. Four people refused to take a survey here.
- Our Lady of The Rockies is located on the hillside east of Butte. The researcher rode the bus with the visitors but was unable to get cooperation from the visitors. Some people were looking for a religious experience, some were not, but either way, nobody wanted to fill out a survey. This type of site is not recommended for future data collection.
- Sapphire Gallery & the Sweet Palace are located in Philipsburg. Visitors come in and out of these stores all day. There were benches outside encouraging respondents to sit down and fill out surveys. The only disadvantage of the Sweet Palace was the distraction by children of the parents who were completing the survey. There were three refusals at this site.

- Virginia City is an old western town located near Ennis. The town was sleepy until about 11:00am. After 11:00, visitation increased substantially. Tourists were easy to intercept by the train station as they waited for a ride. Three people refused the survey here.
- The World Museum of Mining in Butte is an unpredictable place to survey. Visitation was sporadic. Surveying here is only recommended if the researcher can spend a block of time such as 5 hours at the site. Three people refused to participate in the survey.

Success in data collection at the twelve attractions varied widely. Two sites, the golf course and Our Lady of the Rockies were deemed poor data collection sites. In retrospect, visitors to Our Lady of the Rockies should have been intercepted while waiting for the tour, similar to the Last Chance Tours and the caverns. The golf course provided a type of activity not conducive to surveying. Many people finish a golf game dwelling on the missed shot or poor game. This is not a good time to intercept people! The remaining sites, however, proved to work well with visitors.

Methodology Summary

The first objective of this study was to determine the best survey instrument and methods to use at the regional level. Results of this study show that an on-site survey with a mail-back expenditure postcard is the best type of instrument. Intercepting visitors at attractions is recommended as long as the activity at the site is not too intense such as golfing or a religious experience. It is recommended, however, to reconsider the need for expenditure data collected at the regional level. First of all not everyone will complete the data or send it back. Second, not all the data is relevant to the region. Finally, unless the number of people intercepted is greatly increased, there will not be enough expenditure information gathered to make generalities about the visitor. More discussion on this issue follows in the results section.

Results

The results presented reflect the combination of the on-site/mail-back postcard and the mail-back survey instruments. The questionnaires were identical. Only the method of returning the surveys differed. The on-site only survey was not used in the analysis since it was tested first for both methods and questions. Enough questions were altered or added to make the on-site-only instrument significantly different from the other two. The results below represent 134 returned questionnaires.

Sixty-one percent of all the visitors had visited Gold West Country in the past. Most travel groups (86%) indicated vacation, recreation, and pleasure as one reason for visiting the Gold West Travel Region of Montana followed by visiting friends and relatives (41%). These two reasons stayed on top as the primary reason (51% and 27%, respectively) (Table 2). Only 11 percent of the respondents indicated “just passing through” as their primary reason for being in Gold West Country. When compared to the 21 percent of the state’s nonresident visitors who are “passing through” it is apparent that this study does reflect and capture visitors who are “experiencing” the region and not by-passing the region.

Table 2: Reasons for Visiting Gold West Country

	All reasons for visiting Gold West Country	Primary reason for visiting Gold West Country
Vacation/Recreation/Pleasure	86%	51%
Visiting Friends, Relatives/Family Event	41%	27%
Just Passing Through	18%	11%
Other	7%	4%
Shopping	3%	4%
Business/Conference	2%	4%

Lewis and Clark Caverns and the Virginia City Boardwalk (31%) were the most popular attractions people visited while in the Gold West Region. Some other popular attractions were the Sweet Palace (26%) Berkley Pit (22%), Old Montana Prison (22%), State Capitol (20%), and three attractions all had 19 percent of the visitors; Bannack State Park, the Montana Historical Society Museum, and the Sapphire Gallery.

Table 3: Attractions Visited*

All Gold West attractions people have visited	Percent	All Gold West attractions people have visited	Percent
Anaconda		Deer Lodge	
Anaconda Stack	8%	Old Montana Prison	22%
Copper Village Museum	5%	Montana Auto Museum	15%
Old Works Golf Course	5%	Grant-Kohrs Ranch	9%
Butte		Frontier Montana Museum	7%
Berkley Pit	22%	Montana Law Enforcement Museum	6%
World Museum of Mining	17%	Virginia City/Nevada City	
Copper King Mansion	11%	Virginia City Boardwalk	31%
Arts Chateau	6%	Alder Gulch Railroad	12%
Mineral Museum	6%	Nevada City Tour	11%
Our Lady of the Rockies	6%	Virginia City Playhouse	10%
Downtown Trolley Tour	5%	Robber's Roost	8%
Granite Mountain Mine Memorial	4%	Other Locations	
Dumas Brothel Museum	4%	Lewis and Clark Caverns	31%
Picadilly Museum of Transportation	2%	Bannack State Park	19%
Philipsburg		Gates of the Mountain	16%
Sweet Palace	26%	Big Hole National Battlefield	16%
Sapphire Gallery	19%	National Forest Lands	13%
Granite Museum	11%	Fairmont Hot Springs	11%
Dillon		Garnet Ghost Town	10%
Lewis and Clark Sites	13%	Canyon Ferry Lake	8%
Beaverhead County Museum	9%	Lehmi Pass	6%
Patagonia Outlet	5%	Holter Hauser Lakes	5%
Helena		Warm Springs Ponds	4%
State Capitol Building	20%	Elkhorn Ghost Town	3%
Montana Historical Society Museum	19%	Whitehall Murals	2%
Last Chance Gulch	16%		
Last Chance Train Tour	16%		
St. Helena's Cathedral	9%		
Original Governor's Mansion	6%		
Museum of Gold	2%		
St. Joseph Catholic Mission Church	0%		

*Note of caution: Some of these sites may have larger visitation numbers since the data collection occurred at the sites. This skews the data toward survey sites.

Group members indicated what activities they participated in while visiting Gold West Country. Visiting Museums (57%) and Shopping (49%) were the most popular activities indicated by visitors. Photography (37%), Hiking (34%), Wildlife viewing (34%) and Camping (33%) and were also popular activities for tourists visiting Gold West Country.

Table 4: Activities participated in while visiting Gold West Region

All Activities Groups Members Participated In	Percent	All Activities Groups Members Participated In	Percent
Visit Museums	57%	Horseback Riding	5%
Shopping	49%	Gambling	5%
Photography	37%	Canoeing/Kayaking	5%
Hiking	34%	Mountain Biking	5%
Wildlife Viewing	34%	Motor-Boating/Water Skiing	4%
Camping	33%	Sporting Event	3%
Picnicking	28%	Off-Highway Riding ATV	3%
Fishing/Fly Fishing	26%	Road/Tour Biking	2%
Special Event/Festival	15%	Sailing/Windsurfing	1%
Other Activity	13%		
River Rafting/Floating	14%		
Golfing	8%		
Golfing	8%		
Rock Hounding	8%		
Backpacking	7%		

Visitors to the Gold West Country were asked to indicate how many nights they planned to spend in Montana and Gold West Country. Twenty percent stayed 8 -14 nights in Montana, but only 9% spent that amount of nights in Gold West Country. The largest group (24%) spent one night in the travel region followed by those who spent three nights (16%). An interesting statistic here is that only six percent of people who visited attractions in Gold West Country did not spend the night in the region. This suggests a strong correlation between stopping at attractions and spending the night which in turn provides a higher economic impact to the region.

Table 5: Nights in Montana and Gold West Country

Number of Nights Spent in Montana	Percent	Number of Nights Spent in Gold West Country	Percent
0 Nights	0%	0 Nights	6%
1 Night	9%	1 Night	24%
2 Nights	14%	2 Nights	13%
3 Nights	13%	3 Nights	16%
4 Nights	11%	4 Nights	11%
5 Nights	6%	5 Nights	7%
6 Nights	9%	6 Nights	5%
7 Nights	7%	7 Nights	7%
8 - 14 Nights	20%	8 - 14 Nights	9%
15 + Nights	10%	15 + Nights	3%

Visitor groups who were staying one night or more in Gold West Country were asked to indicate the different types of accommodations used. Thirty-seven percent of visitors to the region were staying in hotels. Staying with friends and relatives was also popular among visitors groups (29%) followed by camping (24% public and 17% private campgrounds). What is interesting about the camping statistic, is it means that 41% of the visitors camp in Gold West Country during their stay. It appears that people who camp are more likely than others to stop at attractions. In terms of marketing the attractions, it would be beneficial to have brochure racks located at the campgrounds.

Table 6: Type of Accommodation Used

Type of Accommodation	Percent Who Spent At Least One Night
Hotel/Motel/Bed & Breakfast	37%
Home of Friend or Relative	29%
Camping/Public Land	24%
Camping/Private Campground	17%
Guest Ranch	4%
Rented Cabin/Home	4%
Vehicle in Parking Area	3%
Resort/Condominium	3%
Private Cabin/Second Home	2%
Other	1%

Visitors to Gold West Travel Region indicated which information sources were used regarding their stop in the region. As would be expected, word-of-mouth was the most frequently used information source (47%), followed by brochure racks (25%) and the Internet (22%).

Table 7: Sources of Information

Sources of Information Used for Stops in Gold West Country	Percent
Information from Family or Friends	47%
Brochure Rack	25%
Internet Travel Information	22%
Automobile Club (e.g.AAA)	19%
Guide Book (not auto club book)	16%
Montana Travel Planner	16%
Chamber of Commerce/Visit Bureau	13%
Gold West Travel Guide	10%
Magazine/Newspaper Article	8%
None of These Sources Were Uses	8%
Billboards	6%
State Travel Information Number	2%
Information from Private Businesses	2%
Travel Agency	1%
Regional Travel Information Number	0%

Most people who visited the site where they were intercepted had made plans to see the site 1-6 months in advance (30%) followed by 25 percent who planned it more than 6 months in advance (Table 8). Interestingly, 24 percent planned to visit that site within that travel week, indicating more of a spur of the moment decision while on the trip. This statistic confirms data in Table 9 indicating that the majority of visitors do have flexibility in their travel plans and can be spontaneous. Visitors were asked how flexible their group’s travel plans were. Thirty-six percent of the visitors to the Gold West region already had plans for their group but might make some unplanned stops in the region. Overall, most people were quite flexible with their travel plans and had few plans written in stone (34%).

Table 8: Planning Horizon for Visiting Site

Plans in Advance to Visit Site	Percent
Today	13%
1 - 7 days	11%
1 - 4 weeks ago	22%
1 - 6 months ago	30%
Over 6 months ago	25%

Table 9: Amount of Flexibility in Travel

Group's Flexibility of Travel Plans	Percent
All the places we want to visit have been planned in advance	10%
Most places we want to visit have already been planned, but we might make unplanned stops	36%
We have only made plans to visit a few places, so we are quite flexible.	34%
We have not make definite plans to visit any places, so we are very flexible	20%

Only eight percent of visitors to Gold West Country visited both Glacier and Yellowstone National Parks on this trip. Twenty-six percent visited just Yellowstone while 12 percent visited only Glacier. This statistic is an interesting one to examine. It has been assumed that travel in Gold West Country was highly correlated to people visiting the national parks. It has even been said that Gold West Country is a “corridor” between the two parks. However, the highest percent (53%) of visitors who stop in the region, do not visit either of the national parks and only eight percent would have followed the “corridor”. While this “corridor” between Yellowstone and Glacier could still exist, it does not appear to exist with the types of people who stop at the attractions in Gold West Country. In other words, marketing to the travelers who are visiting the parks are not the correct group to target unless the intent is to change their travel behavior.

Table 10: Park Visitation

Parks People Visited	Percent
Glacier National Park	12%
Yellowstone National Park	26%
Both National Parks	8%
Neither Park	53%

Most visitor groups to Gold West Country were traveling as a family (36%). If groups weren't traveling as a family, most were traveling as a couple (31%) (Table11). Fifty-nine percent of the visitor groups had two adults in their group. The majority of visitor groups indicated that they were traveling with no children in their group (60%) (Table12).

Table 11: Travel Group

Best Description of Travel Group	Percent
Family	36%
Couple	31%
Family and Friends	15%
Friends	9%
Self	5%
Organized Group/Club	5%
Business Associates	0%

Table 12: Numbers in Travel Group

Number of Adults in Travel Group	Percent	Number of Children Under 18 in Group	Percent
1 Adult	8%	0 Children	60%
2 Adults	59%	1 Child	10%
3 Adults	8%	2 Children	16%
4 Adults	12%	3 Children	5%
5 Adults	3%	4 Children	5%
6 - 10 Adults	6%	5 + Children	4%
11 - 15 Adults	1%		
16 + Adults	3%		

Visitor groups were asked to indicate their permanent residence. Sixteen percent of the respondents were from Montana. Washington was the second most common origin for visitors to Gold West Country (14%), followed by California (13%). It is interesting to note that in ITRR nonresident studies, Washington always comes out as the top nonresident visitor. Gold West Country generally mirrors the statewide nonresident visitor origin profile, however the in-state visitor provides an added dimension to the regional visitor profile. Montanans visiting Montana has not been compared to nonresident visitors. This could indicate an additional marketing focus for the region.

Table 13: Place of Residence

Permanent Residence	Percent
Montana	16%
Washington	14%
California	13%
Utah	6%
Minnesota	4%
Colorado	3%
Idaho	3%
Iowa	3%
Nevada	3%
New York	3%
Oregon	3%
Pennsylvania	3%
Arizona, Maryland, New Mexico, North Dakota, Texas, Virginia, Wisconsin, Wyoming	2%
Delaware, Illinois, Kansas, Michigan, Missouri, New Hampshire, North Carolina, Ohio, South Carolina, South Dakota, Tennessee, Vermont, Saskatchewan, Germany, Switzerland, Netherlands	<1%

The household income of visitors to Gold West Country is generally in the middle income brackets of \$20,000-\$60,000 (43% of visitors). Visitors who earn more than \$100,000/year represent one-fourth of all visitors to the region. These people represent the “high-end” visitor and have the potential to drop greater amounts of money in the region.

Table 14: Household income

Annual Household Income	Percent
Less Than \$20,000	4%
\$20,000 to \$39, 000	18%
\$40,000 to \$59,000	25%
\$60,000 to \$79,000	22%
\$80,000 to \$99,000	6%
\$100,000 or more	24%

A description of expenditures for visitors to Gold West Country was attempted based on the collected data. While these numbers accurately depict the sample surveyed for this study, great caution is urged in generalizing these expenditures to all visitors. First of all, these are visitors who stop at attractions in the region – not all visitors. Secondly, this is a *small* sample of people who spent money. Sample sizes of less than 400 should be questioned when relating the values of expenditures. The most accurate way to use the data in Table 15 would be to describe a pattern. For example, more visitors reported spending money on retail goods and restaurants (52% and 51%) than any other expenditure item. This is followed by gas (34%) and groceries (28%). The largest expenditure outlay was for outfitters/guides but only two respondents spent money in this category.

Based on this data, the average daily expenditure of visitors who stop at attractions in Gold West Country is \$92.18. This is reasonable, based on state estimates which is \$99/day.

Table 15: Expenditures

EXPENDITURE CATEGORY	Mean Expenditure \$	Percent & # of responses per case	
		%	#
Campground	\$24	15%	(21)
Hotel	\$102	19%	(25)
Gas	\$35	34%	(46)
Restaurant	\$37	51%	(69)
Groceries	\$31	28%	(38)
Outdoor Guides	\$250	1%	(2)
Auto/RV rental or repair	\$52	1%	(2)
Transportation fares	\$18	4%	(5)
Fees, licenses	\$31	25%	(33)
Retail goods	\$32	52%	(70)

Discussion

The pilot study conducted in the Gold West Country Travel Region was completed as a test to determine the ability to provide valuable marketing and economic information, the economic feasibility of the study, and the feasibility of the study in general.

Advantages to conducting regional studies:

- All the marketing data is region specific. This type of study provides site and activity specific information for the region. Much of this information, which in the past has occasionally been available from the statewide nonresident study, could only be inferred.
- This type of study provides feedback on those who “experience” the region by way of stopping at an attraction. This type of information has not been provided in the past.
- The visitors intercepted in a region had to have stopped at an attraction thereby providing valuable information about people who stopped rather than information about those who simply passed through the area. This method complements the promotional efforts of the travel region, which is to “get people to stop.”

- This study provides information on both out-of-state visitors as well as Montana visitors from other regions of the state. This is, perhaps, one of the most valuable aspects of a regional study. For example, if we look at the difference in information sources used between nonresidents and Montana residents who stopped at attractions in Gold West Country, we see that the internet and automobile clubs are very important sources for nonresidents but not important at all for residents. Residents, however, use the Gold West Travel Guide substantially more often than nonresidents. This information alone provides excellent suggestions on the marketing tools to use for the different visitors, and is just one example of how the data could be further analyzed if a large enough sample size is obtained to sub-divide the data

Table 16: Comparison of Information Sources used: Montana vs Nonresident

Sources of Information Used for Stops in Gold West Country	All respondents	Montana respondents (n=19)	Nonresident respondents (n=113)
	Percent	Percent	Percent
Information from Family or Friends	47%	74%	43%
Brochure Rack	25%	21%	26%
Internet Travel Information	22%	5%	25%
Automobile Club (e.g.AAA)	19%	0	22%
Guide Book (not auto club book)	16%	5%	19%
Montana Travel Planner	16%	5%	19%
Chamber of Commerce/Visit Bureau	13%	11%	14%
Gold West Travel Guide	10%	21%	9%
Magazine/Newspaper Article	8%	5%	9%
None of These Sources Were Used	8%	11%	7%
Billboards	6%	0	7%
State Travel Information Number	2%	0	3%
Information from Private Businesses	2%	0	3%
Travel Agency	1%	0	1%
Regional Travel Information Number	0%	0	0%

Disadvantages to conducting regional studies:

- From a management perspective, this is a difficult study to conduct. One surveyor in each region (six total) would have to be hired, trained, and supervised. Additionally, a variety of sites would have to be identified and tested to determine where interception of visitors should occur. Logistical concerns are very high.
- The budget for this study is between \$8,000 and \$10,000 for each region or up to \$60,000 for the six-region study. The question to be asked, “Is this data important enough to each region to justify the cost?”
- The results cannot be compared to the statewide nonresident studies conducted by ITRR since the populations intercepted are different (statewide = any nonresident in the state; regional = any person from outside the travel region who stopped at an attraction).
- Since the population studied is “people who stopped,” the economic information cannot refer to all travelers in the region. In addition, only the statewide nonresident study provides the needed information on proportion counts of travelers in Montana. Therefore, estimating the total number of travelers to a region is not feasible with the regional study.
- Since the expenditure data can only represent people who stop, the usefulness of expenditure data may be questioned. Policy makers and others may attempt to compare the expenditure data

generated in the regional study with that generated in the statewide nonresident study. These numbers will not be comparable and will cause confusion and uncertainty. As stated previously, the populations are different and therefore cannot be compared.

Recommendations

A cost/benefit analysis of the study needs to be conducted by each region. If the region is authorizing funding for the study from the regional budget, is the information worth the cost? Only the Board of Directors for each travel region can answer that question. Obviously if the source of funds is not out of their own pocket, the answer is yes. But, if the regions would rather spend their own money on other note-worthy projects, then this study does not hold the value for the price. In addition, each region needs to determine if they already have enough marketing research information from other studies. Does this study provide something that cannot be obtained from other studies?

If the regional study is to be conducted, it is recommended that the study be a marketing study only and not attempt to ask about visitor expenditures. The expenditure data generated in the region cannot be applied to the total number of visitors in the region. It will cause confusion and can easily be used incorrectly.

The regional studies need to be conducted on-site with a survey instrument no larger than one sheet of paper (printed front and back). Expanding the length of the survey will discourage participation and increase the number of incomplete surveys.

The regional studies should be conducted for nine weeks in the summer to generate a sample size of at least 400 for each region. This is based on the number of completed surveys obtained in the three-week pilot study for Gold West Country. On average, 45 completed surveys were collected each week. However, it is recommended that when the sample size exceeds 400 in one particular region, the surveyor should move to another region and assist that regional surveyor in reaching the 400 sample-size goal. It will be very difficult to obtain 400 completed surveys in Missouri River Country but not as difficult for Glacier or Yellowstone Countries. With an additional surveyor to intercept visitors, the 400 sample-size can be reached more easily. When 400 surveys have been completed in each region, the study can cease at that point or the surveyors can move back to their original region (if they assisted another region) and finish the summer in their original region. The objective would be to obtain a minimum of 400 completed surveys for each region.