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Attraction Visitors in Custer Country Travel Region

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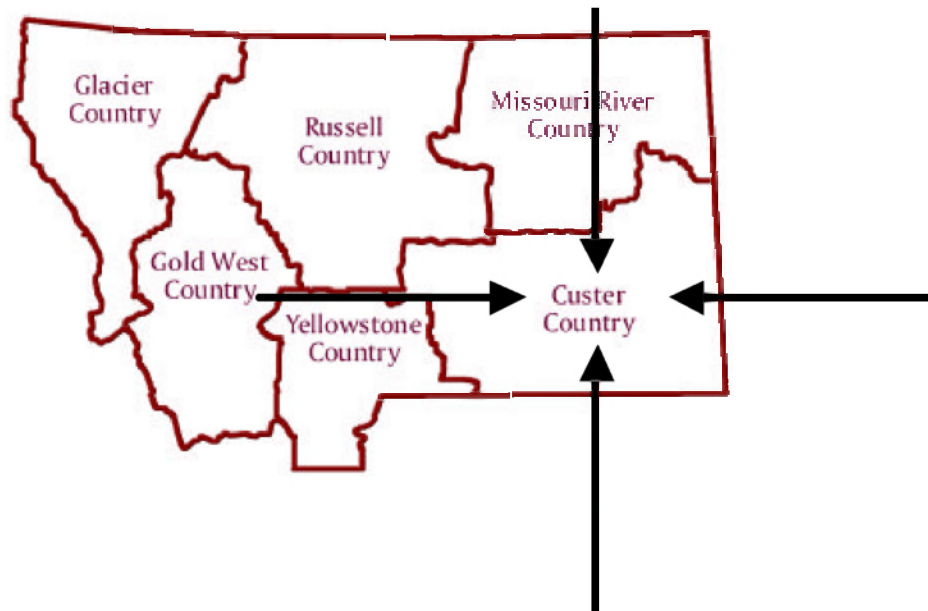
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Attraction Visitors in Custer Country Travel Region



Research Report 2003-10
May 2003

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Special thanks to our Custer Country surveyor, Charlie Beene, whose hard work yielded the data for this report. We would also like to thank Jill Sanderson and Abigail Aronofsky for their hard work in preparing the surveys, palm pilots, and surveyors for this study. Their diligence and attention to detail contributed significantly to making the study efficient and professional.

Executive Summary

Attraction visitors in Custer Country Travel Region

Visitors to Custer Country were intercepted at area attractions from June 15 through August 15, 2002. A total of 560 survey questionnaires were completed. This study describes visitors to attractions in the region.

- The most common primary purpose for visiting Custer Country was vacation (64%) followed by visiting friends and relatives (20%), passing through (9%) and business/conference (4%).
- The average visitor to Custer Country stayed 5.25 nights in the state and 2.76 nights in the region. Sixteen percent did not spend any nights in Custer Country.
- Visitors to Custer Country primarily received their information from family or friends (35%), brochure racks (23%), and the Internet (22%).
- Visitors were most likely to be from out of state (91%), with the largest group from California (11%). Five percent of visitors were Montana residents and four percent were from out of the country.
- Most visitors were traveling as a family (39%) or as a couple (35%) with most traveling without children under 18 years of age (65%).
- While 53 percent of Custer Country visitors had visited Custer Country before 47 percent were first-timers to the region.
- Sixty-seven percent of visitors had planned all or most of the places they would visit.
- Fifty-five percent of visitors made their plans to visit the site they were surveyed at least one month in advance.
- Ten percent of visitors flew on their trip with most arriving in Billings (94%).
- Forty-five percent of Custer Country visitors did not visit a national park. Of those who did visit one of the parks, most visited Yellowstone (46%) while 15 percent visited Glacier.
- Park visitors stayed more nights in Montana (6.1 vs. 4.19 for non-park visitors) and fewer nights in Custer Country than non-park visitors (2.61 vs. 2.95 for non-park visitors).
- Sixty-three percent of non-park visitors had been to Custer Country before whereas only 45 percent of park visitors had.
- Park visitors received their trip information from multiple sources whereas non-park visitors used primarily information from family and friends (46%).
- Visitors who stopped at more than one attraction generally chose attractions geographically close to one another and usually by theme such as *western culture* or *outdoor history markings* as in Pompey's Pillar and Pictograph Caves.
- Activity patterns of Custer Country attraction visitors fell into five main groups: 1) *Leisure Activities* that includes viewing wildlife, photography, and shopping; 2) *Water Recreation* that includes fishing and river running; 3) *Hike & Eat* that includes hiking and picnicking; 4) *Camp & Bike* that includes camping and bicycling; and 5) *Events & Activities* that includes sporting events and other activities.

Chapter 1

Attraction Visitors in Custer Country Travel Region

Introduction

The purpose of this study was to assess summer visitor characteristics of those who stopped at attractions in Custer Country. The study was one part of a six-region visitor survey. Each travel region had five to ten attractions within their region used as the intercept site of visitors. Visitors included both nonresidents and residents of Montana who reside in a different travel region than the one surveyed.

The study objectives included describing visitors to the region in terms of:

- Demographics
- Trip characteristics in the region
- Travel behavior in the region including:
 - Attractions to the region
 - Travel patterns

This report is directed at describing visitors to attractions in Custer Country Travel Region.



Methodology

Travelers visiting attractions in Custer Country Travel Region were intercepted during the summer of 2002. Both residents of Montana who reside outside of Custer Country as well as non-residents were intercepted to obtain a visitor population that was as inclusive as possible. Sites used to intercept visitors were attractions advertised in the region's travel planner as well as sites recommended by the travel region director. Permission was obtained from each attraction owner prior to the start of the surveying and visitors were approached as they left the attraction to reduce the degree of interference with their visit.

Random sampling methods were utilized for this study. This was accomplished by randomly selecting days and times for intercepting visitors at each of the attractions used in the study. Everyone, therefore, who visited an attraction, had an equal chance of being intercepted at one of the attractions.

Intercepted visitors were asked to complete one survey instrument (Appendix A) per group about their travels and about themselves. Surveyors entered the results into Palm Pilots during times when visitation was slow then downloaded the data onto a personal computer for analysis. A statistical package for the social sciences (SPSS) was used for analysis of the data. Sites were visited at random times and days of the week from June 15 through August 15, 2002.

Visitors were contacted at the following sites (numbers in parentheses are how many surveys were collected at that site):

- Bighorn Canyon National Recreation Area (65)
- Custer Battlefield Museum (42)
- Intake Paddlefishing Access (37)
- Little Bighorn Battlefield (143)
- Makoshika State Park (40)
- Moss Mansion (33)
- Pictograph Caves State Park (46)
- Pompey's Pillar (91)
- Prairie County Museum (10)
- Range Riders Museum (53)

Completed surveys for Custer Country totaled 560. This random sample represents visitors to Custer Country who stopped at attractions while visiting the region.

Chapter 2

Results

The results from attraction visitors in Custer Country Travel Region are presented in table and figure format in this chapter with a brief description following each table.

Table 1: Reasons for Visiting Custer Country

	All Reasons* (N)	All Reasons* (%)	Primary Reason (N)	Primary Reason (%)
Vacation/Pleasure	474	85%	360	64%
Visiting Friends/ Relatives	157	28%	112	20%
Passing Through	113	20%	51	9%
Business/Conference	27	5%	20	4%
Shopping	8	1%	-	-
Other	33	6%	17	3%

*Respondents could select more than one reason.

Visitors to Custer Country who spend some time at the region's attractions are mostly visiting the region for vacation (85% all reasons, 64% primary) followed by travelers visiting the area for friends and relatives (28% all reasons, 20% primary) (Table 1). Fewer people who are passing through are spending any time at attractions in the region (20% all reasons, 9% primary).

Table 2: Accommodations and Length of Stay

Average Nights in Montana		5.25	
Average Nights in Custer Country		2.76	
		N	%
Percent of Respondents Using Each Type of Accommodation*	Hotel/motel/bed & breakfast	264	47%
	Home of friend or relative	93	17%
	Camping, public campground	70	13%
	Camping, private campground	68	12%
	Rented cabin/home	30	5%
	Vehicle in parking area	24	4%
	Guest ranch	10	2%
	Private cabin/Second home	4	1%
	Resort/Condominium	1	<1%
	Other	5	1%
Did not spend any nights in Custer Country		89	16%

*Respondents could stay at more than one accommodation type.

Visitors who spend time at Custer Country attractions are spending 2.76 nights in the region and 5.25 nights in Montana (Table 2). Most (84%) are spending at least one night in the region indicating that only 16 percent are day trippers to Custer Country. Nearly half (47%) spent at least one night in a motel or bed & breakfast while 13 percent spent at least one night at a public campground and 12 percent spent at least one night in a private campground. Seventeen percent of attraction visitors to Custer Country stay at the home of a friend or relative.

Table 3: Attractions Visited in Custer Country

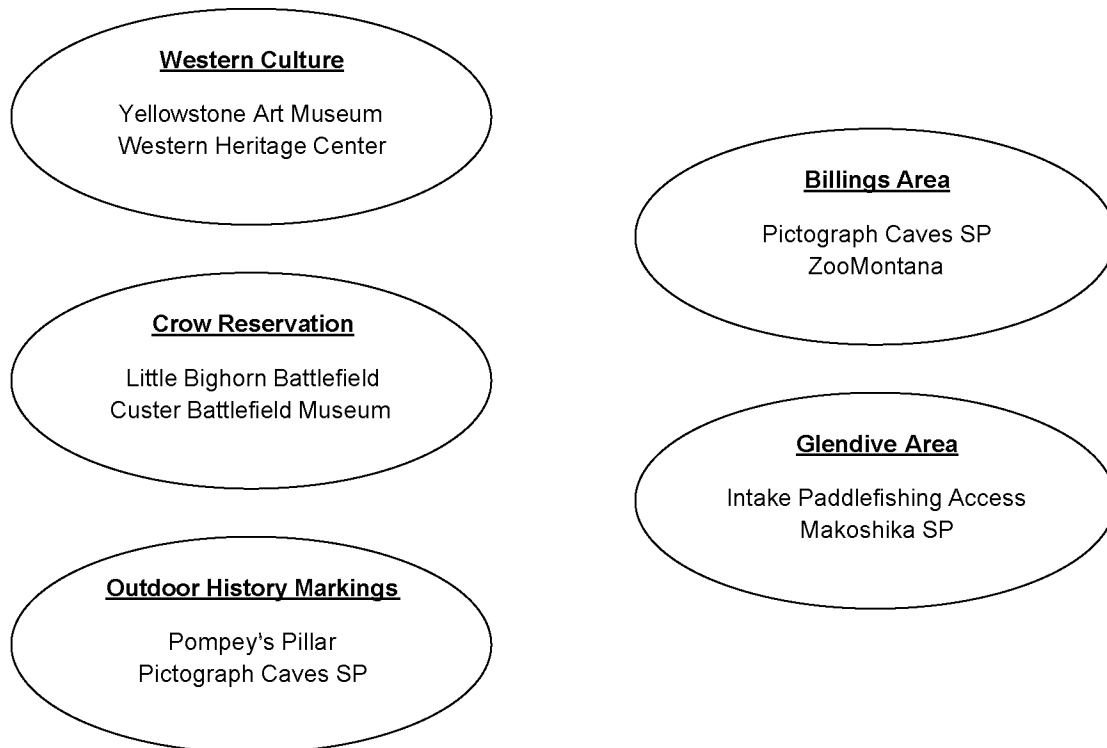
Site*	N	%	Site*	N	%
Little Bighorn Battlefield	270	48%	Lake Elmo State Park	6	1%
Pompey's Pillar	155	28%	Cameron Gallery	5	1%
Custer Battlefield Museum	130	23%	Custer County Art Center	4	1%
Pictograph Caves State Park	88	16%	Powder River Historical Museum	4	1%
Range Riders Museum	78	14%	Rosebud Battlefield	4	1%
Big Horn Canyon National Recreation Area	75	13%	Montana Fair	3	<1%
Makoshika State Park	72	13%	Pierre Wibaux Museum	3	<1%
Moss Mansion	56	10%	Western and Wildlife Museum	3	<1%
Billings Historic District	54	10%	Medicine Rocks State Park	2	<1%
Intake Paddlefishing Access	42	8%	MT Centennial Car Museum	2	<1%
Big Horn County Historical Museum	32	6%	Musselshell Valley Historical Museum	2	<1%
Western Heritage Center	27	5%	National Register Courthouse	2	<1%
Yellowstone Art Museum	21	4%	Tongue River Reservoir	2	<1%
ZooMontana	16	3%	Carter County Museum	1	<1%
Prairie County Museum	15	3%	Cheyenne Indian Museum	1	<1%
Chief Plenty Coups State Park	9	2%	Four Dances Natural Area	1	<1%
Frontier Gateway Museum	9	2%	Huntley Project Museum of Irrigated Agriculture	1	<1%
Canyon Creek Battlefield	8	1%	Rosebud County Pioneer Museum	1	<1%
Peter Yegen Jr. Yellowstone County Museum	7	1%	St. Labre Mission	1	<1%
Two Moons Monument	7	1%	Wildlife Museum	1	<1%

O'Fallon Historical Museum, Huntley Annual Homesteader Days, Reynolds Battlefield, Powder River Wagon Train & Cattle Drive, and Schoolhouse History & Art Center were not visited by this sample.

*Respondents could indicate more than one attraction.

As seen in Table 3, the most visited attractions by people who stopped at attractions in Custer Country were the Little Bighorn Battlefield (48%), followed by Pompey's Pillar (28%), and the Custer Battlefield Museum (23%). All the remaining attractions in Custer Country were visited by less than one-fifth of the respondents.

Figure 1: Groups of Attractions Visited – Results of Factor Analysis



A factor analysis was conducted with attractions where more than ten people visited and a few patterns emerged (Figure 1). Factor analysis attempts to identify underlying variables, or factors, that explain the pattern of correlations within a set of observed variables. Factor analysis is often used in data reduction to identify a small number of factors that explain most of the variance observed in a much larger number of manifest variables¹. In this study, attractions visited by respondents tended to group together by geography such as those located in the same community, or by theme (e.g., culture, history, etc.). Interestingly, six of the attractions with greater than ten visitors did not group together with any other attraction indicating that these are more likely to be the only sites visitors see while in the region. Those six attractions were Miles City's Range Rider Museum, Fort Smith's Big Horn Canyon NRA, Billings' Moss Mansion, Billings' Historic District, Hardin's Big Horn County Historical Museum, and Terry's Prairie County Museum.

¹ For this analysis, a varimax rotation was used and only factors with an Eigen value greater than one were selected. Variables with loadings of .40 or greater were included in the factor.

Table 4: Information Sources for Visiting Custer Country

Source*	N	%	Source*	N	%
Family or friends	198	35%	None of these sources	52	9%
Brochure Rack	129	23%	Custer Travel Guide	23	4%
Internet	123	22%	Chamber of Commerce/ Visitor Bureau	21	4%
MT Travel Planner	106	19%	Private Businesses	17	3%
Auto Club (e.g. AAA)	91	16%	MT Travel Info Phone Number	7	1%
Guide Book	75	13%	Regional Travel Info Phone Number	4	1%
Magazine/Newspaper Article	74	13%	Travel Agency	3	<1%
Billboards	68	12%			

*Respondents could indicate more than one source.

The main information source used by visitors to attractions in Custer Country was family and friends (35%) (Table 4). Twenty-three percent used brochures from a brochure rack and 22 percent used the Internet for their Custer Country information.

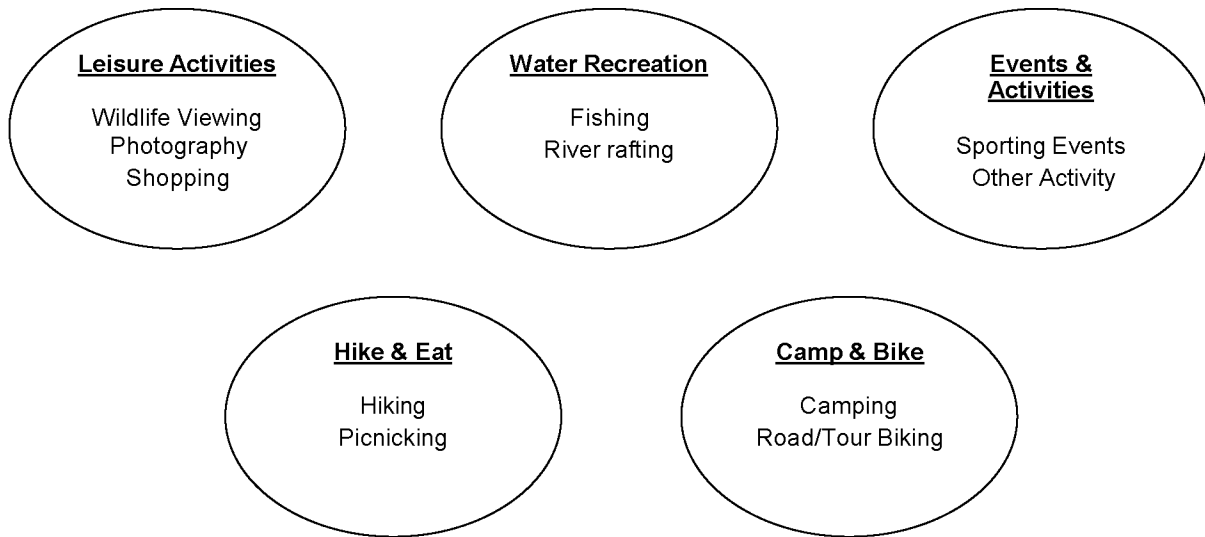
Table 5: Activities Participated in While in Custer Country

Activity*	N	%	Activity*	N	%
Visiting Museums	387	69%	Road/tour Biking	16	3%
Photography	277	50%	Horseback Riding	14	3%
Wildlife Viewing	198	35%	Sporting Event	12	2%
Shopping	121	22%	Golfing	10	2%
Hiking	120	21%	Rock hounding	10	2%
Picnicking	108	19%	Mountain Biking	5	1%
Fishing/Fly Fishing	103	18%	Off-highway Riding/ATV	5	1%
Camping	80	14%	Motor-boating/Water-skiing	4	1%
Other Activity	59	11%	Backpacking	3	<1%
River Rafting/Floating	55	10%	Canoeing/Kayaking	3	<1%
Gambling	20	4%	Sailing/Windsurfing	-	-
Special Event/Festival	19	3%			

*Respondents could indicate more than one activity.

Table 5 provides a look at activities in which visitors to attractions in the region participated. Five different activities had at least one-fifth of the visitors participating. The top activity, visiting museums (69%), was partially a result of the survey locations. Half of the respondents (50%) participated in photography while fewer participated in wildlife viewing (35%), shopping (22%), and hiking (21%).

Figure 2: Activity Patterns – Results of Factor Analysis



When factor analysis was conducted to get a better understanding of the types of activities that group together, five distinct groupings emerged (Figure 2). The group with the greatest number of activities, the “leisure activities” group, liked to combine outdoor activities of wildlife viewing and photography, with the in-town activity of shopping. This was by far the most versatile group. Other activity groups centered on outdoor activities, in-town and other activities. Interestingly while visiting museums was the activity engaged in by the greatest number of visitors, it did not factor with other activities indicating that people visited museums but did not engage in the other popular activities on the list.

Table 6: Attraction Visitors' Place of Residence

	N	%
Montana Residents	29	5%
Out-of-State Residents	498	91%
Foreign Country Residents	22	4%
Total	549	100%
MT County*		5%
Richland	4	14%
Cascade	3	10%
Gallatin	3	10%
Missoula	3	10%
US State*		91%
California	53	11%
Washington	46	9%
Colorado	38	8%
Minnesota	36	7%
Texas	28	6%
Wyoming	27	5%
Oregon	24	5%
Foreign Country*		4%
Canada: British Columbia, Manitoba, Ontario, Saskatchewan	3	14%
England/UK/Wales	3	14%
Germany	3	14%

*Listed areas are the most represented residences and therefore do not add up to the total number of visitors.

People who visited attractions in Custer Country were most likely to be from out-of-state (91%) with Californians comprising the largest share (11%) of nonresidents (Table 6). Because so few people came from other Montana regions and foreign countries, the percentages given should be considered with caution.

Table 7: Characteristics of Visitors to Custer Country

		N	%
Travel Group Type	Family	216	39%
	Couple	192	35%
	Family & Friends	60	11%
	Friends	44	8%
	Self	36	7%
	Organized Group/Club	5	1%
	Business Associates	4	1%
Travel Group Size	Adults: 1	52	9%
	2	363	65%
	3	62	11%
	4+	91	15%
	Children: 0	362	65%
	1	77	14%
	2	75	13%
	3	29	5%
	4+	17	3%
Visited Custer Country Before?	Yes	294	53%
Visited National Parks on this trip?	Yellowstone National Park	255	46%
	Glacier National Park	81	15%
	Did not visit either park	254	45%
Travel Plan Flexibility	All places were planned in advance	129	23%
	Most places were planned	240	44%
	Planned a few places	125	23%
	No definite plans	57	10%
When Were Plans Made to Visit the Site Where Survey was Completed?	Today	90	16%
	1-7 days ago	89	16%
	1-4 weeks ago	72	13%
	1-6 months ago	169	31%
	Over 6 months ago	134	24%
Fly into MT on Trip?	Yes	53	10%
Flew into Which City?	Billings	50	94%
	Bozeman	2	4%
	Missoula	1	2%
	Butte	-	-
	Great Falls	-	-
	Helena	-	-
	Kalispell	-	-
West Yellowstone	-	-	
Household Income	Less than \$20K	21	4%
	\$20K - \$39,999	90	18%
	\$40K - \$59,999	141	28%
	\$60K - \$79,999	119	24%
	\$80K - \$99,999	68	13%
	\$100K +	67	13%

Table 7 shows that visitors to Custer Country attractions were slightly more likely to arrive as families (39%) than as couples (35%). A majority (65%) of attraction visitors, however, were not traveling with children under 18. Forty-seven percent were visiting Custer Country for the first time and 10 percent flew

into Montana with most (94%) of those flying into Billings. Less than half (45%) of those who visited attractions in Custer Country did not visit a national park. Fifteen percent visited Glacier National Park while 46 percent visited Yellowstone National Park. Exactly half (50%) of all attraction visitors had incomes over \$60,000. Sixty-seven percent said that all or most of the places they visited were planned in advance of their visit, leaving one-third (33%) quite flexible in their travel plans. Nearly one-third (31%) planned to visit the site where they were surveyed at least 1-6 months before while 32 percent of the visitors made the decision within a week.

This next section provides a comparison of visitors who visited either Glacier National Park or Yellowstone National Park to those who did not visit either park (Tables 8-10). More than half (55%) of those who visit attractions in the region visited one or both of the national parks.

Table 8: Park and Non-park Visitor Characteristics

		Park Visitor (55%)		Non-park Visitor (45%)	
Length of Stay	Average nights in Montana	6.10		4.19	
	Average nights in Custer Country	2.61		2.95	
Travel Group	Average number of adults	2.43		2.72	
	Average number of children	0.75		0.75	
		N	%	N	%
	Family	124	41%	92	36%
	Couple	111	37%	81	32%
	Family & Friends	26	9%	34	13%
	Friends	22	7%	22	9%
	Self	18	6%	18	7%
	Organized Group/Club	2	1%	3	1%
	Business Associates	1	<1%	3	1%
Visited Custer Country Before?	Yes	136	45%	158	63%
Travel Plan Flexibility	All places were planned in advance	50	17%	79	31%
	Most places were planned	150	50%	90	36%
	Planned a few places	74	25%	51	20%
	No definite plans	25	8%	32	13%
When Were Plans Made to Visit the Site Where Survey was Completed?	Today	40	13%	50	20%
	1-7 days ago	46	15%	43	17%
	1-4 weeks ago	27	9%	45	18%
	1-6 months ago	100	33%	69	27%
	Over 6 months ago	88	29%	46	18%
Fly into MT on Trip?	Yes	22	7%	31	12%
Household Income	Less than \$20K	9	3%	12	5%
	\$20K - \$39,999	37	14%	53	23%
	\$40K - \$59,999	77	28%	64	28%
	\$60K - \$79,999	73	27%	46	20%
	\$80K - \$99,999	39	14%	29	13%
	\$100K +	40	15%	27	12%

Some differences are seen between park and non-park visitors to Custer Country attractions. First of all, non-park visitors are more likely to be repeat visitors of Custer Country (63%) compared to park visitors

(45%). However, while park visitors spent more time in Montana (6.10 nights compared to 4.19 nights), non-park visitors spent more of their time in Custer Country (2.95 nights or 70% of their Montana time was spent in Custer Country). The other noticeable difference is in household income where 56 percent of park visitors earn over \$60,000 compared to 45 percent of non-park visitors.

Table 9: Park and Non-park Visitor Activities

Activity*	Park Visitor (55%)		Non-park Visitor (45%)	
	N	%**	N	%
Visiting Museums	238	78%	149	59%
Photography	175	57%	102	40%
Wildlife Viewing	136	44%	62	24%
Hiking	74	24%	46	18%
Shopping	73	24%	48	19%
Picnicking	63	21%	45	18%
Camping	45	15%	35	14%
Fishing/Fly Fishing	43	14%	60	24%
Other Activity	22	7%	37	15%
River Rafting/Floating	19	6%	36	14%
Road/tour Biking	14	5%	2	1%
Gambling	11	4%	9	4%
Horseback Riding	11	4%	3	1%
Special Events/Festivals	10	3%	9	4%
Sporting Event	7	2%	5	2%
Golfing	6	2%	4	2%
Rock hounding	5	2%	5	2%
Off-highway riding/ATV	4	1%	1	<1%
Canoeing/Kayaking	3	1%	-	-
Mountain Biking	2	1%	3	1%
Backpacking	2	1%	1	<1%
Motor-boating/Water-skiing	1	<1%	3	1%

*Respondents could indicate more than one activity.

**Top five activities are in bold.

A majority of both park visitors (78%) and non-park visitors (59%) visited museums in Custer Country (Table 9). Similarly, most of the top activities for both groups followed a similar distribution. However, considerably more park visitors participated in photography and viewing wildlife while more non-park visitors engaged in fishing, river rafting, and other activities.

Table 10: Park and Non-park Visitor Information Sources

Source*	Park Visitor		Non-park Visitor	
	N	%	N	%
Brochure Rack	87	28%	42	17%
Info from Family and Friends	81	27%	117	46%
Internet	81	27%	42	17%
Montana Travel Planner	81	27%	25	10%
Auto Club (e.g., AAA)	62	20%	29	11%
Guide Book	52	17%	23	9%
Magazine/Newspaper Article	43	14%	31	12%
Billboards	34	11%	34	13%
None of These Sources	27	9%	25	10%
Custer Country Travel Guide	16	5%	7	3%
Chamber of Commerce/Visitor Bureau	11	4%	10	4%
Private Businesses	5	2%	12	5%
Regional Travel Info Number	3	1%	1	<1%
State Travel Info Number	2	1%	5	2%
Travel Agency	-	-	3	1%

*Respondents could indicate more than one source.

In terms of information sources used, park visitors used a mix of brochures (28%), information from family and friends (27%), the Internet (27%), and the Montana Travel Planner (27%) (Table 10). In contrast, non-park visitors mainly used information from family and friends (46%) with all other sources garnering less than 20 percent.

Chapter 3

Summary and Discussion

Summary

The results of the regional travel study highlight a variety of travel patterns and characteristics of visitors to Custer Country Travel Region attractions. This section summarizes the travel characteristics of visitors to Custer Country attractions and provides some suggestions for marketing the region based on the current visitors.

Trip Characteristics

The primary reason for visitors to travel to Custer Country was vacation (64%) with visiting friends and relatives being the next most popular reason for visiting (20%). Custer Country attraction visitors stayed 5.25 nights in the state and 2.76 nights in the region. Most visitors to Custer Country stayed in a hotel, motel, or bed and breakfast (47%) followed by public campgrounds (13%) and private campgrounds (12%) and 17 percent who stayed with friends or family.

Ten percent of visitors to Custer Country flew on their trip. Of those who flew, nearly all arrived at the Billings airport (94%). Visitors predominantly indicated that they had planned most or all of the places they would visit on their trip (67%) and their plans to visit the site they were surveyed at were made one to six months before their trip (31%) or over six months (24%). The information sources most used were family and friends (35%), brochure racks (23%), and the Internet (22%).

While in Montana, many visitors to Custer Country attractions visited a national park with most going to Yellowstone National Park (46%) and others going to Glacier National Park (15%). Slightly less than half did not visit either park (45%).

Visitor Behavior

In Custer Country, visiting museums was the activity participated in the most (69%), though this is partially due to the sampling methods of this study. Photography was the next most popular activity engaged in (50%), followed by wildlife viewing (35%). Shopping is included as one of the top four activities (22%) of Custer Country attraction visitors.

The most visited attraction in Custer Country was the Little Bighorn Battlefield (48%). Other more popular attractions included Pompey's Pillar (28%) and the Custer Battlefield Museum (23%). Sixteen percent of the visitors to the region went to Pictograph Caves State Park.

Visitor Characteristics

Visitors to Custer Country attractions were primarily families (39%) and couples (35%). Most groups consisted of two adults (65%) and were not traveling with children under 18 years of age (65%). A little over half (53%) of the visitors to Custer Country attractions had visited the region before.

Most visitors to Custer Country attractions were non-residents visiting from a different state (91%). The most represented states were California (11%) and Washington (9%). Resident visitors accounted for five percent of all visitors. Visitors from foreign countries accounted for four percent of Custer Country attraction visitors with most traveling from Canada. Regarding income levels, Custer Country attraction visitors were most likely to earn \$40,000 to \$60,000 (28%) or \$60,000 to \$80,000 (24%).

Park Visitors and Non-park Visitors

Visitors to Custer Country attractions who visited a national park stayed an average of 6.10 nights in Montana and 2.61 nights in Custer Country whereas visitors who did not visit a national park stayed an average of 4.19 nights in Montana and 2.95 nights in Custer Country. Sixty-three percent of non-park visitors had visited Custer Country before but only 45 percent of park visitors had. More non-park visitors flew on their trip (12%) than park visitors (7%).

Both park and non-park visitors participated in visiting museums the most (78% and 59% respectively) as well as in photography (57% and 40% respectively). Fishing was a more popular activity among non-park visitors (24%; 14% for park visitors) as was river rafting/floating (14%; 6% for park visitors). Park visitors participated more in wildlife viewing (44%; 24% for non-park visitors), shopping (24%; 19% for non-park visitors), and hiking (24%; 18% for non-park visitors).

While park visitors got most of their information from multiple sources such as brochure racks (28%), friends and family (27%), the internet (27%), and the Montana Travel Planner (27%), non-park visitors got most of their information from friends and family (46%).

Household income is higher for park visitors than non-park visitors. Fifty-six percent of park visitors earn \$60,000 or more whereas only 45 percent of non-park visitors earn as much. Seventeen percent of park visitors earn less than \$40,000 while 28 percent of non-park visitors earn as much.

Discussion and Marketing implications

The purpose of this study was to assess nonresident and resident visitor characteristics of those who traveled to Custer Country attractions. This discussion will help to develop a better understanding of the marketing implications of the research data. In addition, future research strategies are offered to help further clarify the visitor market to Custer Country and how they can be reached.

Type of promotion:

Visitors to Custer Country attractions relied on the advice of family and friends more than any other information source. While this is always the most used source of information for travelers everywhere, it suggests the continued need for good employees and volunteers at attractions throughout the region. When visitors leave satisfied, they recommend that experience to others. Therefore, it is suggested that the Super Host and other front-line education programs are used throughout the region. In addition, if familiarization tours for the local people could be provided at the attractions, or a "free weekend" was offered in order to see attractions throughout the region, then residents are more likely to suggest to their visiting friends and relatives the attractions that they have seen. Word of mouth is a very powerful promotional tool and can be beneficial to increasing visitation at area attractions.

Interestingly, about one-fifth of the travelers to Custer Country attractions used brochure rack information, the Internet, and the Montana Travel Planner. All of these promotional techniques should be continued and be updated regularly. The Internet and the Montana Travel Planner (if received at home) suggest that advanced planning is important to these visitors and, indeed, a majority of these visitors do make most of their plans in advance. Using information from a brochure rack, on the other hand, points to the flexible traveler who can be convinced to see something on the spur of the moment. Those travelers are open for suggestions and could be persuaded by a front-line individual such as a motel clerk, gas station

attendant, or wait persons. Again, the Super Host program could be utilized as a mechanism to train these employees so they can encourage longer visits in the region.

Promotion based on where visitors are from:

As expected, most attraction visitors to Custer Country reside in other states. Although residents of California made up the largest share of attraction visitors, residents from other states had just slightly smaller percentages. This scenario offers considerable marketing potential but also a greater challenge in that no one state clearly leads in terms of Custer Country attraction visitors. Instead, there are several states with many visitors to the region that can be targeted for attraction promotions and other marketing strategies. Because of the diversity of visitor origins, mediums like Internet websites and brochures that focus on outdoor attractions and activities could help draw a larger pool of visitors considering these findings show visitors to Custer Country have an interest in outdoor-related attractions. Furthermore, these mediums are conducive to advance travel planning which these survey respondents indicated as the type of planning they organize.

Since very few visitors to Custer Country attractions were residents of other regions within the state, it may be wise to assess whether that market is worth attracting. Billings is the largest city in the state and undoubtedly receives many in-state travelers on business. One avenue of promotion would be to try encourage these business travelers to travel to nearby attractions in the region. It could simply start with aggressive promotion to business travelers of what is available just in the Billings area. However, in order for this to be successful, attractions would need to stay open into the evening hours as this is when the business travelers typically have more available time. Once the business traveler has visited and enjoyed a site, then they are more likely to suggest to their family back home that a subsequent visit to the attraction is a good idea. In fact, maybe the traveler would view Billings as a great family get-away weekend. Once the idea of traveling to Billings for vacation is successful, promoting other attractions further away from the business center could be incorporated.

Issues related to length of stay:

A very interesting finding in this study is the visitors' length of stay (LOS) in the region and the state. For unclear reasons, travelers to Custer Country attractions spent less time in the region compared to visitors of attractions in other travel regions as well as less time in the state.

As seen by the following comparison, Custer Country attraction visitors stay 1.26 to 2.5 nights *less* in the region compared to other regions and between 1.5 & 2.25 nights *less* in the state.

	<u>LOS in region</u>	<u>LOS in state</u>
Glacier Country	5.26	7.50
Yellowstone Country	4.50	6.45
Missouri River Country	4.15	7.22
Gold West Country	4.05	6.85
Russell Country	4.02	7.48
Custer Country	2.76	5.25

The challenge for Custer Country would be to try to lengthen visitors' stay in the region. It is generally acknowledged that once a visitor pulls off the highway and visits an attraction, they are more likely to spend a night in the region. In all the other regions, the factor analysis of attractions visited showed that most people visited more than one attraction and therefore spent extra time in the region. An interesting finding with Custer Country was that while attractions were visited, many travelers only visited one attraction. In addition, the factor analysis of activities showed that the activity of visiting museums did *not* factor with other activities. This was the most engaged in activity in the region. So, what does this suggest?

Before discussing this, it must be noted that the survey did not ask, "Why aren't you staying longer?" so this discussion is speculative. The reasons, however, could be many. First, the fact that two interstates intersect in Custer Country allows people to quickly move through the area. Once on the interstate, it

may simply be easier to stay on it and continue with their travels. Second, the travel region is geographically large with towns and many attractions far apart from each other. This makes the ease of visiting more than one attraction perhaps more trouble than it is worth for some travelers. Third, it may be related to the availability of promotional materials about what is on hand to visitors. If information about the attractions is hard to find, then it may simply be a matter of evaluating the promotional techniques. Fourth, only three of the 45 listed attractions saw more than one-fifth of the travelers. For some reason, the travelers who visit attractions in the region do not appear as active as travelers in other regions. It could, therefore, simply be a reflection of the personality type of the traveler.

Whatever the reason for the short length of stay in Custer Country, it seems promotional and marketing strategies for the region should be analyzed and possibly changed as this is one aspect that people in the region can easily modify or change. As seen by the data, those travelers who did visit more than one attraction showed up in the factor analysis as five different attraction groups primarily based on geography. This suggests the continued promotion of attractions with other geographically connected ones. If visitors were encouraged to visit other attractions in the area and then pursue those attractions, it would likely extend their stay. Considering that Custer Country attraction visitors are not very flexible in their planning and, alternatively, do most of their planning well in advance of their trip, suggestions for visiting other attractions would have to be made before the visitor arrived in Montana. It is recommended that Custer Country and the attractions within the region have a joint strategy session for marketing their attractions. Such things as circle tours from attraction to attraction with package discounts promoted via web sites and through AAA could be a good starting point.

Promotion based on activity type:

Activities that visitors participated in also have marketing implications. Attraction visitors to Custer Country factored into five activity groups, and these groupings provide promotional themes for attracting more visitors to specific activities. The five emergent themes are:

1. Leisure Activities – Visitors in this group engage in viewing wildlife, photography, and shopping. These types of visitors enjoy many outdoor activities yet also prefer opportunities offered in town. This group likely enjoys an active but non-strenuous, relaxed lifestyle.
2. Water Recreation – These visitors participate in fishing and river running. Visitors of this type seem to only want the active outdoor experience and probably have little interest in town and community activities.
3. Hike & Eat – Visitors in this group are primarily involved in hiking and picnicking. Like the Leisure Activities group, these types of visitors generally enjoy non-strenuous outdoor activities but likely have a limited desire to visit nearby towns.
4. Camp & Bike – These visitors' activities mainly center on camping and bicycling. This is an interesting group and could provide an opportunity for marketing. Custer Country has a number of long, remote roads that could be a biker's dream. Perhaps this region could highlight the biking theme in promotions which could in turn provide business opportunities for small towns along the bike routes such as bed and breakfasts, camping facilities, bike repair shops, and eating places.
5. Events & Activities – Visitors in this group are more difficult to define since they selected both sporting events and other activity. More analysis is needed in order to describe this group more completely.

Promotion based on park vs. non-park visitation:

Several differences emerged between Custer Country park and non-park attraction visitors. Considerably more park visitors visited museums, pursued photography, and viewed wildlife than non-park visitors who preferred more fishing and river running than park visitors. Additionally, non-park visitors primarily receive information about Custer Country from family and friends while park visitors receive information from a variety of sources. These differences suggest that park and non-park visitors have differing interests, plan differently, and will, therefore, respond to different marketing promotions. Attracting the park visitor to Custer Country will likely require marketing that conveys more leisure attractions and recreation, while non-park visitors may respond more favorably to marketing that targets water-related activities.

Promotion based on group type:

Finally, while the largest travel group type to Custer Country attractions was families (39%), couples followed closely (35%). Further analysis, however, shows that 65 percent of all visitors did not travel with children under 18. The adult travel market, therefore, is more prevalent than the family market to Custer Country attractions. It is recommended that promotions for the region concentrate on adults, showing adults enjoying their vacation in Custer Country. Many Custer Country attractions are history related which generally draw more adults than children. This can be a positive attribute to the region and utilized as a reason to visit.

Future Research:

The most intriguing question that emerges from this study is related to length of stay. It would be interesting and useful to know why people do not spend more time in the region. A study that focuses on this question could help with promotion and perhaps economic development if it is found that travelers could be persuaded to stay longer in the region.

Another research question centers around the first timers (47% of visitors) and repeat visitors (53% of visitors). Which group is staying longer in the region? Which group is more active? Are there significant differences in these groups to justify differing marketing techniques? Some of these questions could be answered through further analysis of this data base and perhaps suggest marketing strategies.

Finally, other research centers on some other unknowns in this study. A modest percentage (11%) of respondents chose "other activity" as one of the activities they participated in while in Custer Country. This response begs the question of what truly constitutes "other activity," and could that information provide meaningful insights about the attraction visitor? Additionally, more than one-third of the respondents selected "family or friends" when asked about information sources used for visiting Custer Country. This response leaves researchers questioning what information family and friends have and how they acquired it. Answers to these and other questions would help provide an even more complete and comprehensive understanding of the attraction visitor to Custer Country, thus providing more marketing potential.

Appendix

A

Survey Instrument