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Attraction Visitors in Missouri River Country Travel Region

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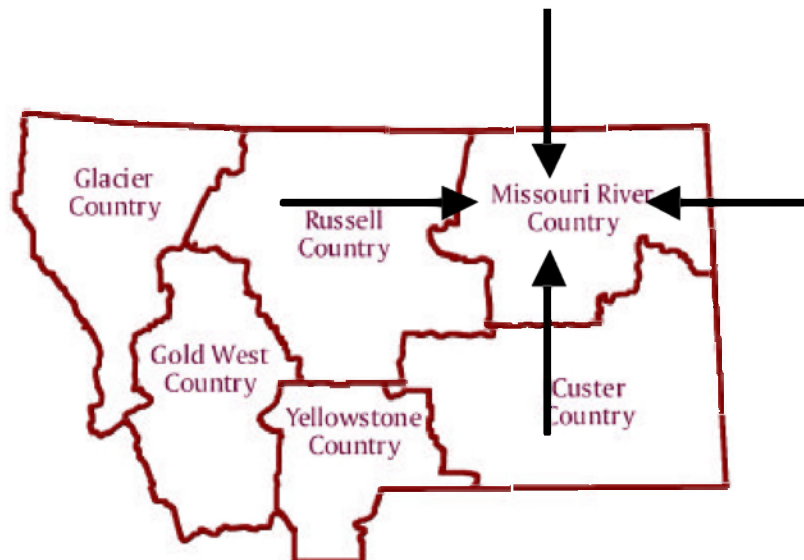
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Attraction Visitors in Missouri River Country Travel Region



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Special thanks to our Missouri River Country surveyor, Mark Stouffer, 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 to Missouri River Country Travel Region

Visitors to Missouri River Country were intercepted at area attractions from June 15 through August 15, 2002. A total of 221 survey questionnaires were completed. This study describes visitors to attractions in the region.

- The most common primary purpose for visiting Missouri River Country was vacation (47%) followed by visiting friends and relatives (28%) and passing through (14%).
- Visitors stayed an average of 7.22 nights in Montana and 4.15 nights in Missouri River Country however one-fifth of attraction visitors were day-trippers to the region.
- Information sources most used include family or friends (31%) or none of the sources mentioned or no sources (27%), followed by visitors who used the Internet (14%).
- More than half (63%) of the visitors to Missouri River Country were from out of the state with the majority visiting from Washington (15%). However, 32 percent of the attraction visitors were residents of Montana. Five percent were visiting from another country.
- The most common travel group type was as a couple (36%) while 29 percent were families.
- Sixty-seven percent of visitors were not traveling with children under 18 years of age.
- While a little over half (56%) had visited Missouri River Country in the past, there were a significant number (44%) who were visiting for the first time.
- An almost even split of the visitors were visiting a national park compared to not visiting a national park on their trip (49% were visiting a park compared to 51% not visiting a park). Of those who did visit a National Park, 30 percent visited Glacier and 13 percent visited Yellowstone.
- Missouri River Country visitors who visited a National Park stayed an average of 8.07 nights in Montana and 4.01 nights in the region. Those visitors who did not visit a National Park stayed an average of 6.36 nights in Montana and 4.26 nights in the region.
- Forty-five percent of park visitors were traveling as couples. Thirty three percent of non-park visitors were traveling as families and were more likely to be traveling with children under 18 than the park visitors.
- Sixty-seven percent of non-park visitors had visited Missouri River Country before whereas 46 percent of park visitors had previously visited the region.
- Park visitors obtained their information from multiple sources whereas non-park visitors mostly used information from family and friends (38%) and none of the sources mentioned or no sources (33%).
- Visitors to attractions generally visited more than one attraction when the attractions were geographically close to one another.
- Activity patterns of Missouri River Country attraction visitors fell into five main groups: 1) *Do-It-All Group* that includes hiking, wildlife viewing, photography, picnicking, visiting museums, and shopping; 2) *Active Outdoors* that includes camping, motorboating/waterskiing, and fishing; 3) *Relaxed Outdoors* that includes picnicking and sporting events; 4) *Outdoor/Indoor* that includes golfing, rock hounding, and gambling; 5) *Leisure Activities* that includes visiting museums, special events and festivals, and other activities.

Chapter 1

Attraction Visitors to Missouri River Country Travel Region

Introduction

The purpose of this study was to assess summer visitor characteristics of those who stopped at attractions in Missouri River 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 of Montana 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 Missouri River Country Travel Region.



Methodology

Travelers visiting attractions in Missouri River Country Travel Region were intercepted during the summer of 2002. Both residents of Montana who reside outside of Missouri River 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):

- Culbertson Visitor Information Center (54)
- Field Station of Paleontology (62)
- Fort Peck Lake (19)
- Fort Peck Summer Theater (22)
- Garfield County Museum (5)
- MonDak Heritage Center (9)
- Phillips County Museum (42)
- Pioneer Town (6)
- Wolf Point Historical Society and Museum (2)

Completed surveys for Missouri River Country totaled 221. This random sample represents visitors to Missouri River Country who stopped at attractions while visiting the region.

Chapter 2

Results

The results from attraction visitors in Missouri River 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 Missouri River Country

	All Reasons* (N)	All Reasons* (%)	Primary Reason (N)	Primary Reason (%)
Vacation/Pleasure	153	69%	90	47%
Visiting Friends/ Relatives	75	34%	54	28%
Passing Through	52	24%	27	14%
Business/Conference	9	4%	5	3%
Shopping	2	1%	-	-
Other	19	9%	17	9%

*Respondents could select more than one reason.

Table 1 shows that visitors to Missouri River Country who spend some time at the region's attractions are mostly visiting the region for vacation (69% all reasons, 47% primary) followed by over one-quarter visiting the area for friends and relatives (34% all reasons, 28% primary). Fewer people who are passing through are spending any time at attractions in the region (24% all reasons, 14% primary).

Table 2: Accommodations and Length of Stay

Average Nights in Montana		7.22	
Average Nights in Missouri River Country		4.15	
		N	%
Percent of Respondents Using Each Type of Accommodation*	Camping, public campground	69	31%
	Hotel/motel/bed & breakfast	56	25%
	Camping, private campground	40	18%
	Home of friend or relative	34	15%
	Private cabin/Second home	7	3%
	Rented cabin/home	3	1%
	Vehicle in parking area	3	1%
	Resort/Condominium	2	1%
	Guest ranch	-	-
	Other	6	3%
Did not spend any nights in Missouri River Country		17	20%

*Respondents could select more than one accommodation type.

Visitors who spend time at Missouri River Country attractions are spending 4.15 nights in the region and 7.22 nights in Montana (Table 2). Most (80%) are spending at least one night in the region, however there are still one-fifth of the attraction visitors who are day-trippers to Missouri River Country. Thirty-one percent spend at least one night in a public campground and 18 percent spend a night in a private campground while 25% spend at least one night in a motel or bed & breakfast. Fifteen percent of attraction visitors to Missouri River Country stay at the home of a friend or relative.

Table 3: Attractions Visited in Missouri River Country

Site*	N	%	Site*	N	%
Fort Peck Dam and Lake	116	53%	Charles M. Russell NWR	8	4%
Field Station of Paleontology	67	30%	The Agate Stop	7	3%
Culbertson Museum & State Info Center	59	27%	Nelson Reservoir	5	2%
Powerhouse Museum	53	24%	Garfield County Museum	5	2%
Phillips County Museum	51	23%	Sheridan County Museum	4	2%
Fort Peck Summer Theatre	48	22%	Pioneer Pride Museum	3	1%
Lewis & Clark Overlook	36	16%	Pow Wows	3	1%
Fort Peck Museum	30	14%	Today's Tractors	3	1%
Dinosaur Institute	28	13%	Bitter Creek Wildlife Viewing Area	2	1%
Rock Creek Marina	28	13%	Daniels County Courthouse	2	1%
Fort Union	14	6%	Golf Courses	2	1%
MonDak Heritage Center	13	6%	Historical Society Museum	2	1%
Valley County Pioneer Museum	12	5%	Medicine Lake NWR	2	1%
Wolf Point Historical Society & Museum	12	5%	Snowden & Old Fairview Bridges	2	1%
Pioneer Town & Museum	11	5%	Circle C Ranch	1	1%
Assiniboine & Sioux Cultural Center & Museum	11	5%	Historic Frontier Towns	1	1%
Hell Creek Recreation Area	10	5%	The Huntley School in Saco	1	1%
Leo B. Coleman Wildlife Exhibit	10	5%	M ^c Cone County Pioneer Museum	1	1%
Sleeping Buffalo Hot Springs & Golf	10	5%	Slippery Ann Wildlife Station	1	1%
Bowdoin NWR	8	4%			

*Five Wheels and Fox Lake Wildlife Management Area were not visited.

As seen in Table 3, the most visited attractions by people who stop at attractions in Missouri River Country are the Fort Peck Dam and Lake (53%), the Field Station of Paleontology (30%), and the Culbertson Museum and State Information Center (27%). Following those top three are the Powerhouse Museum (24%), the Phillips County Museum (23%), and the Fort Peck Summer Theater (22%).

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, three of the attractions with greater than eight visitors did not group together with any other attraction indicating that these are more likely to be stand-alone sites. Those three attractions were Glasgow's Valley County Pioneer Museum, the Pioneer Town and Museum near Scobey, and Malta's Bowdoin National Wildlife Refuge.

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 Missouri River Country

Source*	N	%	Source*	N	%
Family or friends	68	31%	Chamber of Commerce/Visitor Bureau	11	5%
None of these sources	59	27%	Billboards	10	5%
Internet	31	14%	Missouri River Travel Guide	9	4%
MT Travel Planner	25	11%	MT Travel Info Phone Number	5	2%
Brochure Rack	23	10%	Private Businesses	1	1%
Guide Book	22	10%	Regional Travel Info Phone Number	1	1%
Auto Club (e.g. AAA)	17	8%	Travel Agency	1	1%
Magazine/Newspaper Article	17	8%			

*Respondents could select more than one source.

The main information source used by visitors to attractions in Missouri River Country was family and friends (31%), while more than one-quarter (27%) of them did not use any of the sources listed (Table 4). Only 14 percent used the Internet while 11 percent used the Montana Travel Planner.

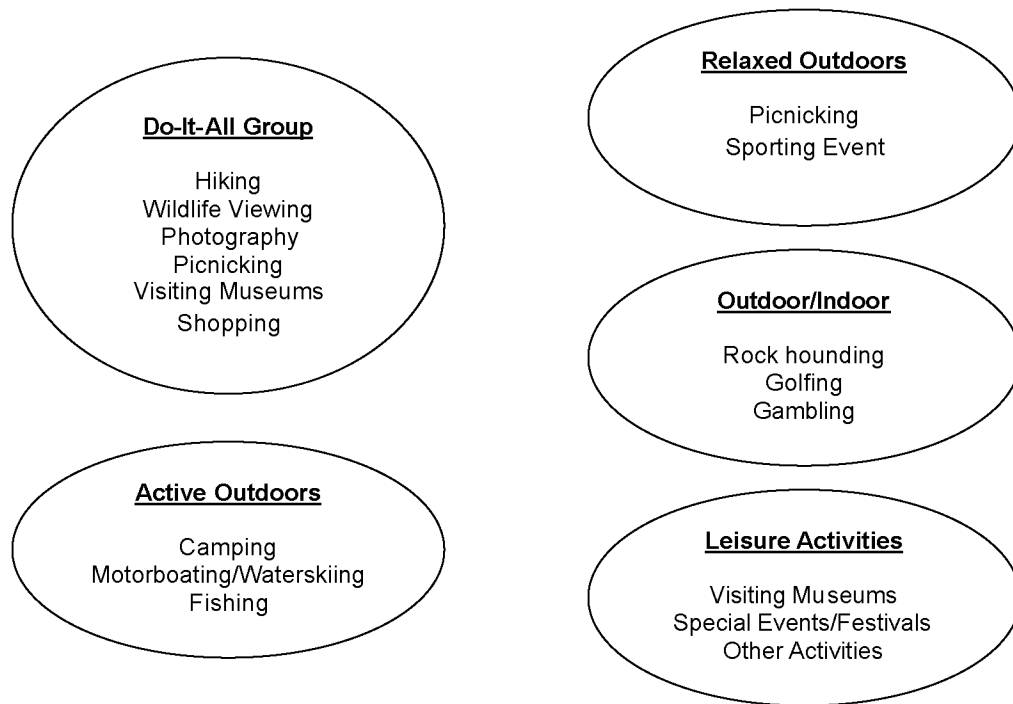
Table 5: Activities Participated in While in Missouri River Country

Activity*	N	%	Activity*	N	%
Visiting Museums	91	41%	Rock hounding	14	6%
Camping	68	31%	Gambling	11	5%
Wildlife Viewing	56	25%	Golfing	6	3%
Fishing/Fly Fishing	51	23%	Mountain Biking	6	3%
Photography	46	21%	Sporting Event	5	2%
Shopping	40	18%	Backpacking	3	1%
Hiking	36	16%	Off-highway Riding/ATV	2	1%
Picnicking	32	15%	Canoeing/Kayaking	1	1%
Other Activity	32	15%	Horseback Riding	1	1%
Special Event/Festival	26	12%	River Rafting/Floating	1	1%
Motor-boating/Water-skiing	23	10%	Sailing/Windsurfing	-	-
Road/tour Biking	16	7%			

*Respondents could select 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, was partially a result of the survey locations. However, four of the five top activities were outdoor activities such as camping, wildlife viewing, fishing, and photography.

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). Each group represents a different form of recreation and was named as best as possible to describe the grouped activities. The activities within each group indicate a relationship where visitors are likely to participate in those types of activities. The group with the greatest number of activities, the “do-it-all group,” liked to combine outdoor activities of hiking, wildlife viewing, photography and picnicking, with the in-town activities of visiting museums and shopping. This was by far the most versatile group. Other activity groups centered on outdoor activities, in-town and other activities.

Table 6: Attraction Visitors' Place of Residence

	N	%
Montana Residents	63	32%
Out-of-State Residents	125	63%
Foreign Country Residents	10	5%
Total	198	100%
MT County*		32%
Hill	10	16%
Custer	7	11%
Yellowstone	7	11%
US State*		63%
Washington	18	15%
Minnesota	11	9%
California	9	7%
Michigan, Wisconsin	8	7%
Foreign Country*		5%
Canada: Ontario	4	40%
Canada: Saskatchewan	2	20%

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

People who visited attractions in Missouri River Country were most likely to be from out-of-state (63%) followed by visitors from Montana but outside the region (32%) (Table 6). Residents from Hill County are the most frequent visitors to Missouri River Country from the state. Nonresidents of the state are more likely to be from Washington (15%) or Minnesota (9%).

Table 7: Characteristics of Visitors to Missouri River Country

		N	%
Travel Group Type	Couple	76	36%
	Family	62	29%
	Family & Friends	32	15%
	Friends	17	8%
	Self	16	8%
	Organized Group/Club	9	4%
	Business Associates	-	-
Travel Group Size	Adults: 1	24	11%
	2	137	62%
	3	20	9%
	4+	37	17%
	Children: 0	147	67%
	1	23	11%
	2	23	11%
	3	15	7%
	4+	12	6%
Visited Missouri River Country Before?	Yes	123	56%
Visited National Parks?	Glacier National Park	67	30%
	Yellowstone National Park	28	13%
	Did not visit either park	112	51%
Travel Plan Flexibility	All places were planned in advance	27	13%
	Most places were planned	49	23%
	Planned a few places	65	31%
	No definite plans	68	33%
When Were Plans Made to Visit the Site Where Survey was Completed?	Today	37	17%
	1-7 days ago	43	20%
	1-4 weeks ago	32	15%
	1-6 months ago	54	25%
	Over 6 months ago	47	22%
Fly into MT on Trip?	Yes	12	6%
Flew into Which City?	Billings	10	91%
	Missoula	1	9%
	Bozeman	-	-
	Butte	-	-
	Great Falls	-	-
	Helena	-	-
	Kalispell	-	-
	West Yellowstone	-	-
Household Income	Less than \$20K	10	6%
	\$20K - \$39,999	43	26%
	\$40K - \$59,999	52	32%
	\$60K - \$79,999	29	18%
	\$80K - \$99,999	13	8%
	\$100K +	18	11%

Table 7 shows that visitors to Missouri River Country attractions were more likely to arrive as couples (36%) than as families (29%). This is also shown with 67 percent of the respondents traveling with no

children under age 18. Forty-four percent were visiting Missouri River Country for the first time and six percent flew into Montana with nearly all of them flying into Billings. Fully half (51%) of those who visited attractions in Missouri River Country did not visit a national park. Thirty percent visited Glacier National Park while 13 percent visited Yellowstone National Park. Over half (58%) of all visitors had incomes between \$20,000 and \$60,000. Thirty-six percent said that all or most attraction sites were planned in advance of their visit; however, 64 percent were quite flexible in their travel plans. Fully one-quarter (25%) planned to visit the site where they were surveyed at least 1-6 months before, yet 37 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. Forty-nine percent 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 (49%)		Non-park Visitor (51%)	
Length of Stay	Average nights in Montana	8.07		6.36	
	Average nights in Missouri River Country	4.01		4.26	
Travel Group	Average number of adults	2.52		3.71	
	Average number of children	0.43		1.24	
		N	%	N	%
	Couple	46	45%	30	27%
	Family	26	26%	36	33%
	Self	11	11%	5	5%
	Friends	9	9%	8	7%
	Family & Friends	8	8%	24	22%
	Organized Group/Club	2	2%	7	6%
	Business Associates	-	-	-	-
Visited Missouri River Country Before?	Yes	49	46%	74	67%
Travel Plan Flexibility	All places were planned in advance	7	7%	20	19%
	Most places were planned	20	20%	29	27%
	Planned a few places	36	36%	29	27%
	No definite plans	38	38%	30	28%
When Were Plans Made to Visit the Site Where Survey was Completed?	Today	23	23%	14	13%
	1-7 days ago	14	14%	29	26%
	1-4 weeks ago	17	17%	15	14%
	1-6 months ago	24	24%	30	27%
	Over 6 months ago	24	24%	23	21%
Fly into MT on Trip?	Yes	5	5%	7	6%
Household Income	Less than \$20K	6	8%	4	4%
	\$20K - \$39,999	23	31%	20	22%
	\$40K - \$59,999	22	30%	30	33%
	\$60K - \$79,999	11	15%	18	20%
	\$80K - \$99,999	5	7%	8	9%
	\$100K +	7	10%	11	12%

Some differences are seen between park and non-park visitors to Missouri River Country attractions (Table 8). First off, non-park visitors are more likely to be repeat visitors of Missouri River Country (67%)

compared to park visitors (46%). However, while park visitors spend more time in Montana (8.07 nights compared to 6.36 nights), non-park visitors spend more of their time in Missouri River Country (4.26 nights, or 67% of their time in Montana is spent in Missouri River Country). Interestingly, non-park visitors reported higher incomes than park visitors.

Table 9: Park and Non-park Visitor Activities

Activity*	Park Visitor**		Non-park Visitor**	
	N	%	N	%
Visiting Museums	49	45%	42	38%
Wildlife Viewing	30	28%	26	23%
Camping	28	26%	40	36%
Photography	28	26%	18	16%
Shopping	20	18%	20	18%
Hiking	16	15%	20	18%
Fishing/Fly Fishing	14	13%	37	33%
Other Activity	14	13%	18	16%
Picnicking	13	12%	19	17%
Special Events/Festivals	10	9%	16	14%
Road/Tour Biking	9	8%	7	6%
Rock hounding	8	7%	6	5%
Gambling	6	6%	5	5%
Golfing	2	2%	4	4%
Motorboating/Waterskiing	1	1%	22	20%
Mountain Biking	1	1%	5	5%
Sporting Event	1	1%	4	4%
Backpacking	1	1%	2	2%
Off-highway riding/ATV	-	-	2	2%
Canoeing/Kayaking	-	-	1	1%
Horseback Riding	-	-	1	1%
River Rafting/Floating	-	-	1	1%

*Respondents could select more than one activity.

**Top four activities are in bold.

The top activity for park and non-park visitors was visiting museums (45% and 38% respectively), yet many differences emerged in the subsequent activities (Table 9). Considerably more non-park visitors participated in camping, fishing, and motorboating activities while more park visitors engaged in wildlife viewing photography.

Table 10: Park and Non-park Visitor Information Sources

Source*	Park Visitor		Non-park Visitor	
	N	%	N	%
Info from Family and Friends	26	24%	42	38%
None of These Sources	22	20%	37	33%
Montana Travel Planner	20	18%	5	5%
Internet	17	16%	14	13%
Brochure Rack	13	12%	10	9%
Guide Book	13	12%	9	8%
Auto Club (e.g., AAA)	13	12%	4	4%
Magazine/Newspaper Article	8	7%	9	8%
Billboards	9	8%	1	1%
Missouri River Country Travel Guide	6	6%	3	3%
Chamber of Commerce/Visitor Bureau	5	5%	6	5%
State Travel Info Number	4	4%	1	1%
Private Businesses	1	1%	-	-
Regional Travel Info Number	-	-	1	1%
Travel Agency	-	-	1	1%

*Respondents could select more than one source.

In terms of information sources used, both groups used family and friends more than any other source (Table 10). However, park visitors were more likely to use a variety of sources compared to non-park visitors who were more likely to use none of the sources.

Chapter 3

Summary and Discussion

Summary

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

Trip Characteristics

The primary reason for visitors to travel to Missouri River Country was vacation (47%) with visiting friends and relatives being the next most popular reason for visiting (28%). Visitors to Missouri River Country attractions stayed an average of 7.22 nights in Montana and 4.15 nights in the region. Most visitors to Missouri River Country camped (31% public campground and 18% private campground) while 25 percent stayed at least one night in a hotel, motel, or bed and breakfast, and 15 percent stayed with friends or family.

Not surprisingly, only six percent of visitors to Missouri River Country flew on their trip. Of those who flew, most arrived at the Billings airport (91%). Thirty-three percent of Missouri River Country attraction visitors were very flexible with their plans and did not have any definite plans ahead of time. However, many visitors had made plans to visit the site they were surveyed at least a month prior to their visit (25% made plans one to six months prior to their trip and 22% made their plans over six months prior to visiting). The information sources most used were family and friends (31%), no sources or sources other than those mentioned in the survey (27%), and the Internet (14%).

Visitor Behavior

In Missouri River Country, visiting museums was the activity participated in the most (41%). Camping was the next most popular activity engaged in (31%) with wildlife viewing (25%) following. Also participated in was fishing/fly fishing (23%) and photography (21%).

The most visited attraction in Missouri River Country was the Fort Peck Dam and Lake (53%). Other attractions visited include the Field Station of Paleontology (30%) and the Culbertson Museum and State Information Center (27%).

Visitor Characteristics

Visitors to Missouri River Country attractions were primarily couples (36%) and families (29%). A little over half (56%) of the visitors to Missouri River Country had visited the region before. While in Montana, about half of the visitors went to Glacier or Yellowstone National Parks and the other half did not go to the parks. Of those who did visit a park, 30 percent went to Glacier National Park and 13 percent visited Yellowstone National Park.

Most visitors (68%) to Missouri River Country were non-residents of the state. The most represented states were Washington (15%) and Minnesota (9%). Resident visitors – those who live in Montana but outside Missouri River Country - accounted for 32 percent of visitors. Visitors from foreign countries accounted for five percent of Missouri River Country visitors with most traveling from Canada. Regarding income levels, Missouri River Country visitors were most likely to earn \$40,000 to \$60,000 (32%).

Park and Non-park Visitors

Visitors to Missouri River Country attractions who visited a National Park stayed an average of 8.07 nights in Montana and 4.01 nights in Missouri River Country whereas non-park visitors stayed an average of 6.36 nights in Montana and 4.26 nights in Missouri River Country. Sixty-seven percent of non-park visitors had visited Missouri River Country before but only 46 percent of park visitors had previously visited. Park visitors tended to be couples (45%; 27% of non-park visitors) while non-park visitors tended to be families (33%; 26% of park visitors).

Both park visitors and non-park visitors participated in visiting museums the most (45% and 38% respectively). More non-park visitors camped (36%; 26% of park visitors) while photography was more popular with park visitors (26%) than non-park visitors (16%). Fishing was more popular among non-park visitors (33%; 13% of park visitors) as was motor-boating and water-skiing (20%; 1% of park visitors).

While park visitors received most of their information from multiple sources such as friends and family (24%), the Montana Travel Planner (18%), the Internet (16%), and no sources or sources not included in the survey (20%), non-park visitors got most of their information from friends and family (38%) and no sources or sources other than those mentioned in the survey (33%).

Discussion and Marketing implications

The purpose of this study was to assess nonresident and resident visitor characteristics of those who traveled to Missouri River 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 Missouri River Country and how they can be reached.

Promotion based on attraction location:

Attraction visitors to Missouri River Country factored into six different attraction groups primarily based on geography. This suggests that visitors are more likely to visit attractions located near each other. It is highly recommended that employees of the attractions make it a habit to “sell” other attractions nearby. More than likely, visitors will heed the advice of locals. If visitors are encouraged to visit other attractions in the area and then pursue those attractions, it could likely extend their stay (especially for the 64% who are flexible in their plans). Besides simply recommending other attractions, a technique that works well is that of package pricing and discounts when visiting more than one site. Many people will visit a site if it is part of a package or special deal even if it originally was not in their plans. It is a marketing technique that brings more visitors to the sites (so the attraction wins) and the visitor feels like they are getting a deal (so the visitor wins). Each individual attraction group has the potential of establishing networking relationships among all of the other attractions within an area in order to increase visitation and length of stay.

Promotion based on where visitors are from:

Missouri River Country has an interesting mix of visitors to their attractions. While the majority is still from out-of-state, one-third came from within Montana. This represents a higher percent of in-state visitation to a region than any of the other travel regions and provides opportunities for promotion.

In-state visitors were more likely to come from Hill, Custer, and Yellowstone Counties. It is recommended that promotional efforts be aimed at the eastern and north-central part of the state. Obviously many of the in-state visitors are involved in activities centered around Fort Peck Lake. Perhaps lake conditions

such as water temperature, wind conditions, hot fishing spots, and activities on the lake could be announced daily (or on weekends) on radio programs in Billings, Miles City, Havre, and Lewistown. A continual presence on the radio could encourage visitation because it is always on the minds of potential visitors.

Out-of-state visitors were most likely to come from Washington and Minnesota followed by California, Michigan and Wisconsin. This is a wide geographic spread in which to "cast the promotional net." Any promotion to these geographic areas should be incorporated into promotions done by other regions of the state so as to maximize the dollar.

Type of promotion:

When looking at information sources most likely used, a challenge emerges. Family and friends were the largest used information source (31%) followed by 27 percent not using information sources. This indicates that nearly two-thirds of the visitors are not "reachable" through traditional methods. What is more interesting is that only 14 percent said they used the Internet to get information about Missouri River Country. This infrequent use of the Internet contradicts most vacation planning research that shows the Internet as the most used source for planning. Much of this is explained by the fact that 32 percent of all visitors are from Montana followed by 20 percent who are simply day-trippers to the region. But to confuse the understanding, 47 percent of the visitors still made their plans to visit the site they were surveyed at least one month prior to visiting. So, there is a large segment that plans ahead but do not need information for their planning or rely on friends or past visits.

With that said, how does one reach the Missouri River Country attraction visitor? First of all, if friends and relatives are providing the information to the potential visitor, it is apparent that they have already seen the site and have recommended it to someone else. This is the most powerful form of advertising. It is imperative that attraction employees continue their good service to the visitors. The Super Host program is one such method to assist with well-trained front line employees. Sites throughout Missouri River Country should be sending their employees to these types of programs.

While the majority of visitors did not use the Internet for information gathering, it is still recommended to keep a quality presence on the Web with websites of both Missouri River Country activities and attractions. Web pages suggest travel ideas, especially to those who might be new to the region. It is generally an inexpensive way to continually have a presence in front of the potential traveler. And, since most travelers *do indeed* use the Internet, it is just a matter of time before the first time visitor finds the Missouri River Country web page.

Promotion based on activity type:

Activities that visitors participated in also have marketing implications. Attraction visitors to Missouri River 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. *Do-It-All Group* – Visitors in this group engage in hiking, viewing wildlife, photography, picnicking, visiting museums, and shopping. These types of visitors enjoy many outdoor activities yet also prefer opportunities offered in town. This group likely enjoys doing multiple activities but within a non-strenuous, more relaxed lifestyle.
2. *Active Outdoors* – These visitors participate in camping, motorboating, water-skiing, and fishing. Visitors of this type seem to only want the active outdoor experience and probably have little interest in town and community activities.
3. *Relaxed Outdoors* – Visitors in this group are primarily involved in picnicking and sporting events. Like the Relaxed Recreation group, these types of visitors enjoy non-strenuous outdoor activities but likely have a limited desire to visit nearby towns.
4. *Outdoor/Indoor* – These visitors like to combine outdoor activities like golfing and rock hounding with indoor interests such as gambling. This group will likely not be budget travelers considering some of these activities can require larger amounts of spending.

5. Leisure Activities – Visitors in this group participate in visiting museums, special events and festivals, and other activities. This group enjoys observation-type activities as well as others that are not specified.

In addition to general activity participation, Missouri River Country attraction visitors engaged in different activities based on park and non-park visitors. Considerably more non-park visitors went camping, fishing, and motorboating/waterskiing than park visitors suggesting that they may be more active visitors. This could be partially explained by the non-park visitors' longer length of stay in the region. The differences between these groups expose opportunities for marketing specific activities to specific visitor groups. For example, since considerably more non-park visitors camp and fish than park visitors while in Missouri River Country, local businesses could offer them different camping and fishing options in their area in conjunction with their own products and services. To illustrate this, suppose a local Missouri River business owner knows that non-park visitors frequent their particular business. The owner could then recommend camping and fishing sites, events, maps, and/or a few other camping-related products to customers. Because of the owner's suggestions, this opportunity could benefit the owner through increased sales, as well as the customer through increased information and opportunities.

Park visitors were more likely to visit museums than the non-park visitors. It is recommended that promotions such as brochures for museums in the area present itinerary ideas such as, "What to do on your route to or from Glacier." By suggesting the itineraries, park visitors who are very flexible (74% had no definite plans or had only a few plans) would likely take advantage of such suggestions. A museum guide with travel routes and a suggested visitation time at each site would be useful to many visitors.

Promotion based on group type:

It is interesting to note that the largest travel group type to Missouri River Country attractions were couples. This helps to explain why a large majority (62%) of visitors were not traveling with any children under the age of 18. Perhaps current attraction visitors to the area do not perceive the region as offering opportunities for families. Rather than trying to be both a family and adult market, it is recommended that Missouri River Country concentrate on the adults and promotes the area as an adult outdoor adventure. Whether it is couples or friends, the promotion should show that adults can truly have a "getaway" in Missouri River Country. By not promising family activities, it does not mislead the family market.

Another travel group type with potential for marketing is the attraction visitor who did not stay the night in Missouri River Country—the day-trippers. Although these visitors—who make up 20 percent of all attraction visitors—are probably in the region visiting family and friends or just passing through, they still make the effort to visit attractions in the area. Groups of day-only activities and attractions could be promoted in order to attract the day-trippers to more opportunities in the area. Furthermore, the results of the factor analysis could be very useful in targeting this market segment.

Future Research

It would be interesting to more fully understand the first time versus the repeat visitor to Missouri River Country attractions. Some information could be obtained through further analysis of current data to determine if the repeat visitor is more likely to be from the state rather than out-of-state as is suspected by these researchers. Also, which group stays longer? The first timer or the repeat visitor? Answers to these questions could further delineate the promotional avenues undertaken for the region.

A modest percentage (15%) of respondents chose "other activity" as one of the activities they participated in while in Missouri River Country. This response begs the question of what truly constitutes "other activity," and could that information provide meaningful insights about the attraction visitor? Similarly, more than one-quarter of the respondents selected "none of these sources" when asked about information sources used for visiting Missouri River Country. This response leaves researchers questioning as to what sources the respondents were referring. Answers to these and other questions would help provide an even more complete and comprehensive understanding of the attraction visitor to Missouri River Country, thus providing more marketing potential.

Appendix

A

Survey Instrument