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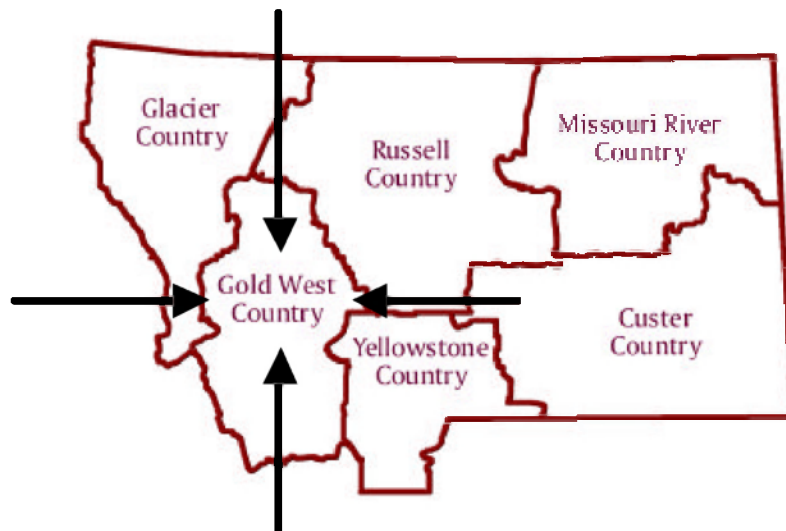
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# Attraction Visitors in Gold West Country Travel Region

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# **Attraction Visitors in Gold West Country Travel Region**

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Research Report 2003-8  
May 2003

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Special thanks to our Gold West Country surveyor, Erin Schwisow, 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 Gold West Country Travel Region*

Visitors to Gold West Country were intercepted at area attractions from June 15 through August 15, 2002. A total of 405 survey questionnaires were completed. This study describes visitors to attractions in the region.

- The most common primary reason for visiting Gold West Country was vacation (59%) followed by visiting friends and relatives (28%).
- Visitors to attractions in Gold West Country stayed an average of 6.85 nights in Montana and 4.05 nights in the region.
- The information source most utilized was family or friends (32%) followed by none of the sources mentioned or no sources (21%).
- Most visitors to Gold West Country were from out of the state (76%) with most visiting from Washington state (17%) and California (12%). Eighteen percent were Montana residents and six percent were visiting from another country.
- Most visitors were traveling as a family (43%) and were without children under 18 years of age (55%).
- Slightly over half (56%) had visited Gold West Country before leaving a significant number (44%) who had never been in the region in the past.
- Thirty-seven percent of Gold West visitors did not visit a National Park on their trip. Of those who did visit a National Park, 43 percent went to Yellowstone and 24 percent went to Glacier.
- Thirty-four percent of the visitors had most of the places planned that they would visit but 27 percent were very flexible and had no plans made. One-fifth of the visitors decided that day to visit the attraction they were surveyed at but nearly half of the visited planned to visit that site at least one month in advance.
- Visitors to Gold West Country who visited a National Park stayed longer in Montana (7.66 nights) than non-park visitors (5.41 nights), but about the same length in the travel region (4.1 nights for non-park visitors and 4.01 nights for park visitors).
- Sixty-eight percent of non-park visitors had visited Gold West Country before whereas 49 percent of park visitors had previously visited the region.
- Park visitors planned most of the places they would visit (38%) while non-park visitors planned a few places (34%) and both groups made their plans to visit the site surveyed 1-6 months prior.
- Park visitors utilized information from family and friends (29%) and from the Internet (21%). Non-park visitors obtained their information from family and friends (36%) and from none of the sources mentioned or no sources (25%).
- Activity patterns of Gold West Country attraction visitors fell into five main groups: 1) *Relaxed Recreation* that includes hiking, wildlife viewing, photography, and visiting museums; 2) *Active Outdoors* that includes hiking, horseback riding, and river running; 3) *Relaxed Outdoors* that includes camping and fishing; 4) *Town Spenders* that includes shopping, gambling, visiting museums, and rock hounding; and 5) *Other Activities* that includes ATV/Off-highway riding and other activities.

# Chapter 1

## Attraction Visitors in Gold West Country Travel Region

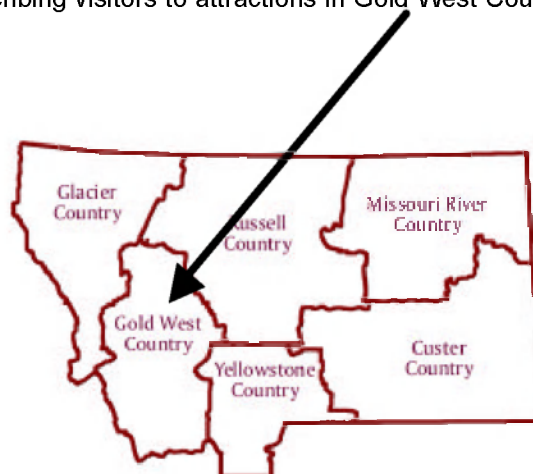
### *Introduction*

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



## **Methodology**

Travelers visiting attractions in Gold West Country Travel Region were intercepted during the summer of 2002. Both residents of Montana who reside outside of Gold West 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 (see 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):

- Bannack State Park (27)
- Big Hole National Battlefield (36)
- Canyon Ferry Lake (8)
- Copper King Mansion (27)
- Gates of the Mountain (38)
- Grant-Kohrs Ranch (17)
- Last Chance Tour Train (21)
- Lewis & Clark Caverns State Park (78)
- Montana Historical Society Museum (16)
- Old Prison Museum (41)
- Phillipsburg (25)
- Virginia City (71)

Completed surveys for Gold West Country totaled 405. This random sample represents visitors to Gold West Country who stopped at attractions while visiting the region.



# Chapter 2

## Results

The results from attraction visitors in Gold West 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 Gold West Country**

	All Reasons* (N)	All Reasons* (%)	Primary Reason (N)	Primary Reason (%)
<b>Vacation/Pleasure</b>	305	75%	209	59%
<b>Visiting Friends/Relatives</b>	156	38%	98	28%
<b>Passing Through</b>	73	18%	27	8%
<b>Shopping</b>	17	4%	2	1%
<b>Business/Conference</b>	15	4%	8	2%
<b>Other</b>	22	5%	13	4%

\*Respondents could select more than one reason.

Visitors to Gold West Country who spend some time at the region's attractions are mostly visiting the region for vacation (75% all reasons, 59% primary) followed by around one-third visiting the area for friends and relatives (38% all reasons, 28% primary) (Table 1). Fewer people who are passing through are spending any time at attractions in the region (18% all reasons, 8% primary).

**Table 2: Accommodations and Length of Stay**

<b>Average Nights in Montana</b>		6.85	
<b>Average Nights in Gold West Country</b>		4.05	
		N	%
<b>Percent of Respondents Using Each Type of Accommodation*</b>	Hotel/motel/bed & breakfast	138	34%
	Home of friend or relative	68	17%
	Camping, public campground	60	15%
	Camping, private campground	56	14%
	Rented cabin/home	9	2%
	Vehicle in parking area	7	2%
	Guest ranch	4	1%
	Private cabin/Second home	4	1%
	Resort/Condominium	1	<1%
	Other	6	2%
<b>Did not spend any nights in Gold West Country</b>		45	14%

\*Respondents could stay at more than one accommodation type.

Visitors who spend time at Gold West Country attractions are spending 4.05 nights in the region (Table 2). Most (86%) are spending at least one night in the region, however a significant number (14%) are day-trippers to Gold West Country. Thirty-four percent spend at least one night in a motel or bed & breakfast and 17 percent spend at least one night in the home of a friend or relative. Nights were also spent in public camping areas (15%) and private camping areas (14%).

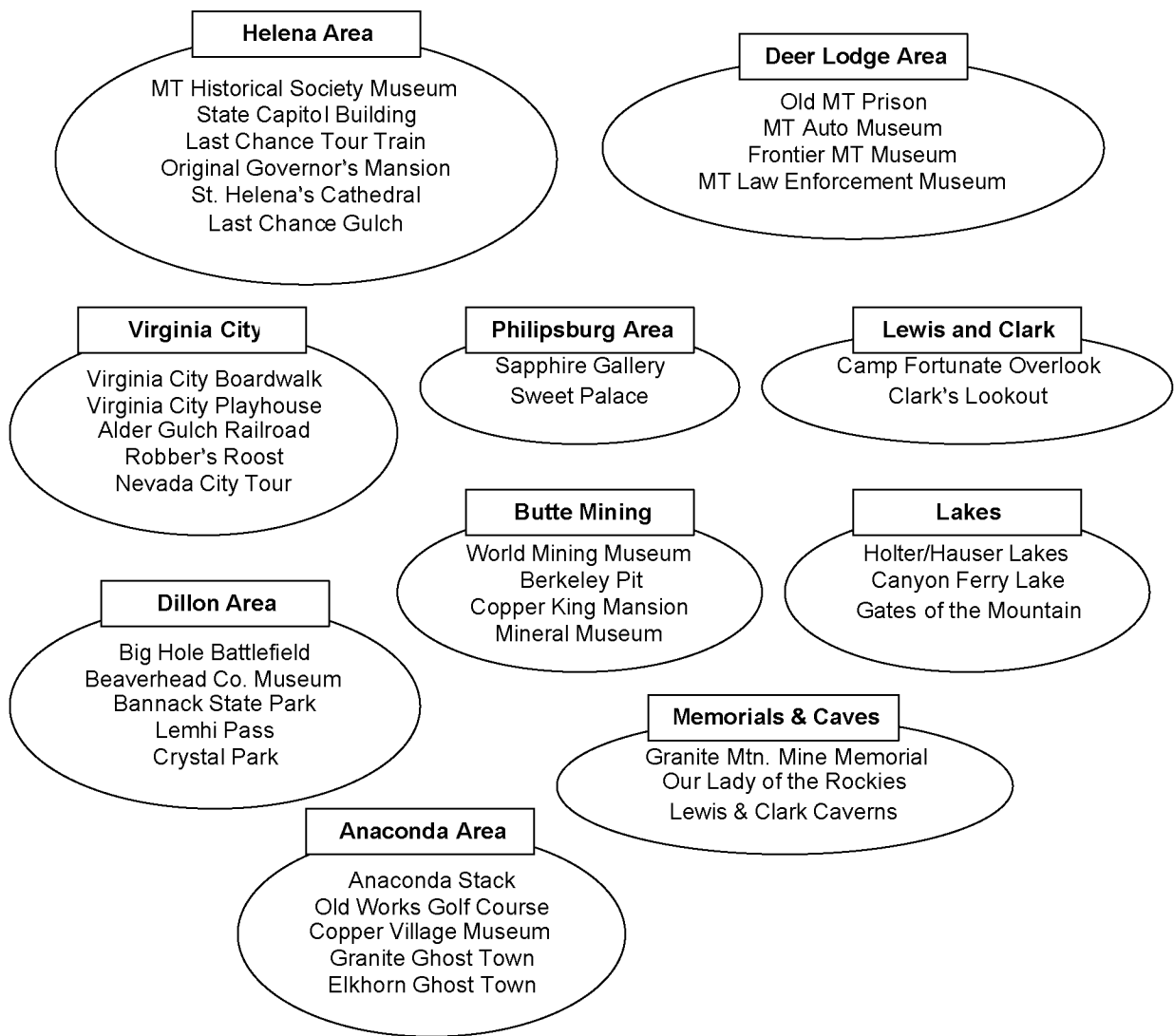
**Table 3: Attractions Visited in Gold West Country**

Site*	N	%	Site*	N	%
Virginia City Boardwalk	148	37%	Camp Fortunate Overlook	21	5%
Lewis & Clark Caverns	114	28%	Original Governor's Mansion	21	5%
State Capitol Building	81	20%	Elkhorn Ghost Town	19	5%
Old Montana Prison	71	18%	Frontier Montana Museum	19	5%
Gates of the Mountain	69	17%	Downtown Trolley Tour	18	4%
Berkeley Pit	64	16%	Granite Ghost Town	18	4%
Big Hole National Battlefield	64	16%	MT Law Enforcement Museum	18	4%
Nevada City Tour	63	16%	Lemhi Pass	15	4%
MT Historical Society Museum	62	15%	Mineral Museum	15	4%
Bannack State Park	53	13%	Clark's Lookout	14	3%
Last Chance Tour Train	53	13%	Beaverhead County Museum	13	3%
Virginia City Playhouse	52	13%	Crystal Park	12	3%
Copper King Mansion	51	13%	Granite Mountain Mine Memorial	12	3%
Alder Gulch Railroad	48	12%	Patagonia Outlet	11	3%
MT Auto Museum	47	12%	Copper Village Muséum	10	3%
Canyon Ferry Lake	44	11%	Old Works Golf Course	10	3%
Last Chance Gulch	43	11%	Granite Museum	9	2%
Grant-Kohrs Ranch	40	10%	Warm Springs Ponds	9	2%
Robber's Roost	39	10%	Museum of Gold	8	2%
St. Helena's Cathedral	39	10%	Dumas Brothel Museum	6	2%
World Mining Museum	39	10%	Powell County Museum	6	2%
Sapphire Gallery	36	9%	Whitehall Murals	6	2%
Sweet Palace	35	9%	Arts Chateau	4	1%
Anaconda Stack	24	6%	St. Joseph Catholic Mission Church	4	1%
Holter/Hauser Lakes	24	6%	Granite County Museum	3	1%
Our Lady of the Rockies	24	6%	The Mai Wah	2	1%
Fairmont Hot Springs	23	6%	Piccadilly Museum of Transportation	1	<1%

\*Respondents could indicate more than one attraction.

As seen in Table 3, the most visited attractions by people who stop at attractions in Gold West Country are the Virginia City Boardwalk (37%) and the Lewis and Clark Caverns (28%). After the top two, attractions in Gold West Country were visited by one-fifth or less 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 variables<sup>1</sup>. 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 ten visitors did not group together with any other attraction indicating that these are more likely to be stand-alone sites. Those three attractions were Deer Lodge's Grant-Kohrs Ranch, Butte's Downtown Trolley, and Dillon's Patagonia Outlet.

<sup>1</sup> 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 Gold West Country**

Source*	N	%	Source*	N	%
Family or friends	128	32%	Billboards	22	5%
None of these sources	84	21%	Gold West Travel Guide	17	4%
Internet	74	18%	Magazine/Newspaper Article	17	4%
Brochure Rack	62	15%	Private Businesses	14	3%
Auto Club (e.g. AAA)	59	15%	MT Travel Info Phone Number	5	1%
MT Travel Planner	49	12%	Travel Agency	1	<1%
Guide Book	37	9%	Regional Travel Info Phone Number	-	-
Chamber of Commerce/ Visitor Bureau	36	9%			

\*Respondents could indicate more than one source.

The main information source used by visitors to attractions in Gold West Country was family and friends (32%), while one-fifth (21%) of them did not use any of the sources listed (Table 4). Eighteen percent used the Internet while 15 percent used brochures from a brochure rack or an auto club.

**Table 5: Activities Participated in While in Gold West Country**

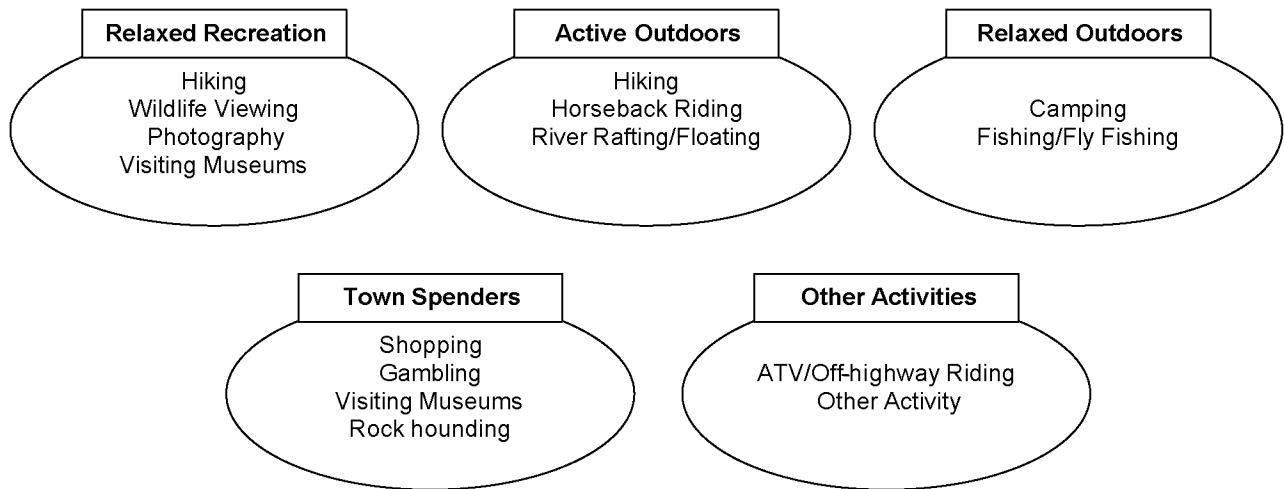
Activity*	N	%	Activity*	N	%
Visiting Museums	188	46%	Horseback Riding	30	7%
Shopping	174	43%	Golfing	26	6%
Photography	171	42%	Motor-boating/Water-skiing	24	6%
Wildlife Viewing	145	36%	Rock hounding	22	5%
Hiking	119	29%	Road/tour Biking	19	5%
Camping	110	27%	Backpacking	17	4%
Picnicking	94	23%	Off-highway Riding/ATV	14	3%
Fishing/Fly Fishing	92	23%	Mountain Biking	12	3%
Other Activity	72	18%	Canoeing/Kayaking	9	2%
River Rafting/Floating	37	9%	Sporting Event	8	2%
Special Event/Festival	37	9%	Sailing/Windsurfing	3	1%
Gambling	32	8%			

\*Respondents could indicate more than one activity.

Table 5 provides a look at activities in which visitors to attractions in the region participated. Six different activities had at least one-quarter of the visitors participating. The top activity, visiting museums, was partially a result of the survey locations. However, four of the six top activities were outdoor activities of camping, hiking, wildlife viewing and photography.

**Figure 2: Activity Patterns – Results of Factor Analysis**

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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 group with the greatest number of activities, the “relaxed recreation” group, liked to combine outdoor activities of hiking, wildlife viewing and photography, with the in-town activity of visiting museums. 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	%
<b>Montana Residents</b>	<b>66</b>	<b>18%</b>
<b>Out-of-State Residents</b>	<b>272</b>	<b>76%</b>
<b>Foreign Country Residents</b>	<b>20</b>	<b>6%</b>
<b>Total</b>	<b>358</b>	<b>100%</b>
<b>MT County*</b>		<b>18%</b>
Gallatin	15	25%
Missoula	10	16%
Yellowstone	10	16%
<b>US State*</b>		<b>76%</b>
Washington	46	17%
California	31	12%
Colorado	16	6%
Oregon	13	5%
<b>Foreign Country*</b>		<b>6%</b>
Canada: Alberta	6	30%
Canada: British Columbia	4	20%
Canada: Ontario	3	15%
Denmark	2	10%

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

People who visited attractions in Gold West Country were most likely to be from out-of-state (76%) followed by visitors from Montana but outside the region (Table 6). Nonresidents of the state are more likely to be from Washington (17%) or California (12%). Residents from Gallatin County are the most frequent visitors to Gold West Country from the state. This makes sense since Gallatin County shares a large border with the travel region.

**Table 7: Characteristics of Visitors to Gold West Country**

		N	%
<b>Travel Group Type</b>	Family	164	43%
	Couple	99	26%
	Family & Friends	72	19%
	Friends	20	5%
	Self	11	3%
	Organized Group/Club	10	3%
	Business Associates	3	1%
<b>Travel Group Size</b>	Adults: 1	23	6%
	2	202	50%
	3	55	14%
	4+	113	27%
	Children: 0	223	55%
	1	52	13%
	2	69	17%
	3	31	8%
	4+	31	8%
<b>Visited Gold West Country Before?</b>	Yes	224	56%
<b>Visited National Parks on this trip?</b>	Yellowstone National Park	176	43%
	Glacier National Park	96	24%
	Did not visit either park	150	37%
<b>Travel Plan Flexibility</b>	All places were planned in advance	33	9%
	Most places were planned	126	34%
	Planned a few places	116	31%
	No definite plans	101	27%
<b>When Were Plans Made to Visit the Site Where Survey was Completed?</b>	Today	79	20%
	1-7 days ago	71	18%
	1-4 weeks ago	54	14%
	1-6 months ago	114	29%
	Over 6 months ago	74	19%
<b>Fly into MT on Trip?</b>	Yes	64	16%
<b>Flew into Which City?</b>	Bozeman	27	44%
	Helena	11	18%
	Missoula	10	16%
	Butte	6	10%
	Billings	4	7%
	Kalispell	2	3%
	Great Falls	1	2%
	West Yellowstone	-	-
<b>Household Income</b>	Less than \$20K	18	6%
	\$20K - \$39,999	50	15%
	\$40K - \$59,999	72	22%
	\$60K - \$79,999	78	24%
	\$80K - \$99,999	48	15%
	\$100K +	63	19%

Table 7 shows that visitors to Gold West Country attractions were more likely to arrive as families (43%) than as couples (26%). Likewise, 45 percent of attraction visitors were traveling with children under 18. Forty-four percent were visiting Gold West Country for the first time and 16 percent flew into Montana with

44 percent of those flying into Bozeman. As many as 37 percent of those who visited attractions in Gold West Country did not visit a national park. However, 24 percent visited Glacier National Park and 43 percent visited Yellowstone National Park. Nearly half (46%) of all visitors had incomes between \$40,000 and \$80,000. Forty-three percent said that all or most attraction sites were planned in advance of their visit, but 58 percent were quite flexible in their travel plans. More than one-quarter (29%) planned to visit the site where they were surveyed at least 1-6 months before, yet 38 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. Sixty-three 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**

		<b>Park Visitor (63%)</b>		<b>Non-park Visitor (37%)</b>	
<b>Length of Stay</b>	Average nights in Montana	7.66		5.41	
	Average nights in Gold West Country	4.01		4.10	
<b>Travel Group</b>	Average number of adults	3.43		3.34	
	Average number of children	1.05		1.41	
		<b>N</b>	<b>%</b>	<b>N</b>	<b>%</b>
	Family	99	42%	65	45%
	Couple	58	25%	41	29%
	Family & Friends	50	21%	22	15%
	Friends	11	5%	9	6%
	Self	7	3%	4	3%
	Organized Group/Club	7	3%	3	2%
	Business Associates	3	1%	-	-
<b>Visited Gold West Country Before?</b>	Yes	123	49%	101	68%
<b>Travel Plan Flexibility</b>	All places were planned in advance	20	9%	13	9%
	Most places were planned	87	38%	39	27%
	Planned a few places	66	29%	50	34%
	No definite plans	57	25%	44	30%
<b>When Were Plans Made to Visit the Site Where Survey was Completed?</b>	Today	47	19%	32	21%
	1-7 days ago	42	17%	29	19%
	1-4 weeks ago	28	12%	26	17%
	1-6 months ago	75	31%	39	26%
	Over 6 months ago	50	21%	24	16%
<b>Fly into MT on Trip?</b>	Yes	43	18%	21	14%
<b>Household Income</b>	Less than \$20K	11	6%	7	5%
	\$20K - \$39,999	33	17%	17	13%
	\$40K - \$59,999	39	20%	33	26%
	\$60K - \$79,999	44	22%	34	26%
	\$80K - \$99,999	27	14%	21	16%
	\$100K +	46	23%	17	13%

Some differences are seen between park and non-park visitors to Gold West Country attractions (Table 8). First of all, non-park visitors are more likely to be repeat visitors of Gold West Country (68%) compared to park visitors (49%). However, while park visitors spend more time in Montana (7.66 nights compared to 5.41 nights), both groups spend about the same amount of time in Gold West Country



(4.10 and 4.01 nights respectively). The other noticeable difference is in household income where 37 percent of park visitors earn over \$80,000 while 29 percent of non-park visitors earn that amount.

**Table 9: Park and Non-park Visitor Activities**

Activity*	Park Visitor		Non-park Visitor	
	N	%	N	%
Visiting Museums	128	50%	60	40%
Shopping	118	46%	56	37%
Photography	108	42%	63	42%
Wildlife Viewing	99	39%	46	31%
Hiking	89	35%	30	20%
Camping	73	29%	37	25%
Fishing/Fly Fishing	58	23%	34	23%
Picnicking	56	22%	38	25%
Other Activity	44	17%	28	19%
River Rafting/Floating	30	12%	7	5%
Gambling	24	9%	8	5%
Special Events/Festivals	23	9%	14	9%
Horseback Riding	22	9%	8	5%
Rock hounding	16	6%	6	4%
Golfing	14	6%	12	8%
Road/Tour Biking	13	5%	6	4%
Backpacking	13	5%	4	3%
Motor-boating/Water-skiing	10	4%	14	9%
Mountain Biking	8	3%	4	3%
Canoeing/Kayaking	8	3%	1	1%
Off-highway riding/ATV	7	3%	7	5%
Sporting Event	5	2%	3	2%
Sailing/Windsurfing	2	1%	1	1%

\*Respondents could indicate more than one activity.

As seen in Table 9, a greater share of park visitors are involved in a variety of activities than non-park visitors. Though both groups had the same top eight activities, park visitors had higher percentages than non-park visitors in five of the eight categories—most by large percentage differences.

**Table 10: Park and Non-park Visitor Information Sources**

Source*	Park Visitor		Non-park Visitor	
	N	%	N	%
Info from Family and Friends	74	29%	54	36%
Internet	54	21%	20	13%
None of These Sources	47	18%	37	25%
Brochure Rack	45	18%	17	11%
Auto Club (e.g. AAA)	41	16%	18	12%
Montana Travel Planner	31	12%	18	12%
Guide Book	25	10%	12	8%
Chamber of Commerce/Visitor Bureau	24	9%	12	8%
Billboards	15	6%	7	5%
Magazine/Newspaper Article	10	4%	7	5%
Private Businesses	10	4%	4	3%
Gold West Country Travel Guide	8	3%	9	6%
State Travel Info Number	5	2%	-	-
Travel Agency	1	<1%	-	-

\*Respondents could indicate 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 Gold West Country Travel Region attractions. This section summarizes the travel characteristics of attraction visitors to Gold West Country and provides some suggestions for marketing the region based on the current visitors.

#### Trip Characteristics

The primary reason for attraction visitors to travel to Gold West Country was vacation (59%) with visiting friends and relatives being the next most popular reason for visiting (28%). Thirty-four percent of Gold West Country attraction visitors spent at least one night in a motel, hotel, or bed & breakfast while 17 percent stayed a night at the home of a friend or relative. Fifteen percent camped in a public campground at least one night while 14 percent camped in a private campground for at least one night.

Sixteen percent of visitors to Gold West Country flew on their trip. Of those who flew, most arrived at the Bozeman/Belgrade airport (44%). Visitors predominantly indicated that they had planned most of the places they would visit on their trip (34%) or planned a few places (31%). For many visitors, their plans to visit the site where they were surveyed were made one to six months before their trip (29%). The information sources most used were family and friends (32%), and the Internet (18%).

#### Visitor Behavior

In Gold West Country, visiting museums was the activity participated in the most (46%), which could possibly be attributed to the sampling methods of this study. Shopping was the next most popular activity engaged in (43%) with photography (42%) and wildlife viewing (36%) also popular.

The most visited attraction in Gold West Country was the Virginia City boardwalk (33%). Other popular attractions included the Lewis & Clark Caverns (28%) and the State Capitol building (20%). The Old Montana Prison was visited by 18 percent of visitors and 17 percent took the Gates of the Mountains boat tour.

#### Visitor Characteristics

Visitors to Gold West Country attractions were more likely to be families (43%) than couples (26%). Just a little over half (56%) of the visitors to Gold West Country had visited the region before leaving a large 44 percent who were visiting for the first time. While in Montana, many visitors to Gold West Country visited a national park with most going to Yellowstone National Park (43%) and others going to Glacier National Park (24%). However, over one-third (37%) of the visitors did not go to either park while in Montana.

Most visitors to Gold West Country attractions were non-residents visiting from a different state (76%). The most represented states were Washington state (17%) and California (12%). Montana resident visitors (who live outside of Gold West Region) accounted for 18 percent of visitors. Visitors from foreign

countries accounted for six percent of Gold West Country visitors with most traveling from Canada. Regarding income levels, Gold West Country attraction visitors were most likely to earn \$60,000 to \$80,000 (24%) or \$40,000 to \$60,000 (22%).

### **Park and Non-park Visitors**

Gold West Country attraction visitors who visited a National Park stayed an average of 7.66 nights in Montana and 4.01 nights in Gold West Country whereas visitors who did not visit a National Park stayed an average of 5.41 nights in Montana and 4.1 nights in Gold West Country. Sixty-eight percent of non-park visitors had visited Gold West Country before but only 49 percent of park visitors had previously visited. More park visitors flew on their trip (18%) than non-park visitors (14%).

Visiting museums (50% of park visitors and 40% of non-park visitors), shopping (46% of park visitors and 37% of non-park visitors), and photography (42% of park visitors and non-park visitors) were the activities with the most participation. Hiking was a more popular activity among park visitors (35%; 20% for non-park visitors) as was river rafting/floating (12%; 5% for non-park visitors). Park visitors also participated more in wildlife viewing (39%; 31% for non-park visitors).

Park visitors received most of their information from friends and family (29%) and the Internet (21%). Non-park visitors got most of their information from friends and family (36%) and sources other than those asked about or no sources (25%).

Park visitors made their plans to visit the site they were surveyed at more in advance than non-park visitors with 31 percent making plans one to six months prior to their trip (26% of non-park visitors) and 21 percent more than six months before their trip (16% of non-park visitors). Park visitors predominantly had most of the places they would visit planned ahead of time (38%) whereas non-park visitors either planned a few places (34%) or did not have any definite plans (30%).

## ***Discussion and Marketing implications***

The purpose of this study was to assess nonresident and resident visitor characteristics of those who traveled to Gold West Country attractions. This discussion will help to develop a better understanding of the marketing implications of the research data.

As anticipated, most attraction visitors to Gold West Country reside in other states. Residents from the state of Washington and California made up the highest groups for two reasons. First, Washington is the nearest state with a large population. Geographically it makes sense to visit Montana. California, with its large population, will always be represented in the nonresident visitor group. In terms of promoting to these groups and others, however, a challenge emerges. Interestingly, family and friends were the largest used information source (32%) followed by 21 percent not using information sources. This indicates that a little over half of the visitors are not "reachable" through traditional methods. What is more interesting is that only 18 percent said they used the Internet to get information about Gold West Country. This infrequent use of the Internet contradicts most vacation planning research that shows the Internet as the most used source for planning. Perhaps some of this is explained by the fact that 18 percent of all visitors are from Montana followed by 14 percent who are simply day-trippers to the region. In addition one-fifth made the decision *that day* to visit the site and another 18 percent decided within the week. This indicates a type of visitor who is less likely to plan in advance and who is able to be flexible in a short period of time.

With that said, how does one reach the Gold West 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 Gold West Country

should be sending their employees to these types of programs. In addition, when looking at the attractions that are visited by groups, it is important that attraction employees recommend nearby attractions to their visitors. The data showed that most visitors were likely to visit more than one site within close proximity. It is a simple matter of suggesting other places to visit and having brochures handy for the visitor.

Interestingly, visitors to Gold West Country attractions spend a majority (nearly 60%) of their total Montana trip time in the region. This is a good sign. It is also something that should be encouraged to continue and possibly even lengthened. Length of stay is positively correlated to economic impact. Therefore, Gold West Country and all the attractions within the region benefit from a long length of stay. Once again, it is recommended that attractions within the region make a concerted effort to recommend to their visitors the other attractions nearby. Since 58 percent of attraction visitors are flexible in their plans, it is likely that efforts to encourage these visitors to stay longer will be effective.

Activities that visitors participated in also have marketing implications. Attraction visitors to Gold West 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. Relaxed Recreation – Visitors in this group engage in hiking, viewing wildlife, photography, and visiting museums. 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. Active Outdoors – These visitors participate in hiking, river running, and riding horses. 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 camping and fishing activities. 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. Town Spenders – These visitors' activities mainly center on spending money in town through shopping, gambling, and visiting museums. Rock hounding is also part of this group but very few (5%) of the respondents engaged in this activity.
5. Other Activities – Visitors in this group are more difficult to define since they selected both ATV/Off-highway riding and other activity. More analysis is needed in order to describe this group more fully.

Participation in Gold West Country activities varied between park and non-park visitors. Considerably more park visitors visited museums, shopped, hiked, and rafted rivers than non-park visitors suggesting that they are more active visitors. This could be partially explained by the park visitors' higher income, as well as having more of their travel itinerary planned in advance and having fewer children traveling with them (influencing their activities). The differences between these groups expose opportunities for marketing specific activities to specific visitor groups. For example, since considerably more park visitors hike than non-park visitors while in Gold West Country, local vendors and service providers could offer them different hiking options in their area in conjunction with their own products and services. To illustrate this, suppose a local Gold West motel owner knows that park visitors frequent the motel. The owner could then recommend hikes and offer hiking guides, maps, and/or a few other hiking-related products to customers. Because of the owner's suggestions, this opportunity could benefit the owner through increased revenues, as well as the customer through increased awareness and opportunities.

Visitors to attractions in Gold West Country are more likely than not to also visit one of the national parks in Montana (63%). With that in mind, Gold West Country should try to reach visitors to the national parks. While it may not be feasible for one region to have their own visitor center on the outskirts of the national parks, it may be an opportunity that each of the six travel regions could explore. Since many of the visitors are flexible in their plans, and many visitors *do indeed* visit the parks, having information available about the rest of Montana attractions near where most visitors are congregated, could be effective. It is a similar concept as what the Alberta visitor center located in West Glacier is doing for Alberta. That visitor center is reportedly very effective in persuading visitors to see sites in the province. This may be a far-

fetches suggestion in terms of cost, but it is recommended that the various travel regions explore the feasibility of such a center.

Another marketing idea focuses on the travel group. While the largest travel group type to Gold West Country attractions was families (43%), there were still 50 percent who indicated their group size was two adults and 55 percent did not have any children under 18 of age with them on the trip. This suggests two evenly distributed groups – those with children and those without. In some sense this presents an opportunity to promote to the two groups who are obviously already visiting the region. But, with promotional funds always stretched, it requires regions like Gold West to decide if they can successfully promote to two groups or if it is necessary to focus on one group.

Finally, further research is recommended to discover what was meant by some of the answers in the survey. A modest percentage of respondents (18%) chose “other activity” as one of the activities they participated in while in Gold West 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-fifth of the respondents selected “none of these sources” when asked about information sources used for visiting Gold West Country. This response leaves researchers questioning to what sources the respondents were referring. Did they simply not use information because they were already aware of the attraction and the region, or were they the type of visitor who does not plan and simply “goes with the flow?” Answers to these and other questions would help provide an even more complete and comprehensive understanding of the attraction visitor to Gold West Country, thus providing more marketing potential.

# Appendix

## A

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### **Survey Instrument**