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Attraction Visitors in Russell Country Travel Region

Norma P. Nickerson

The University of Montana-Missoula

Bethany Sutton

The University of Montana-Missoula

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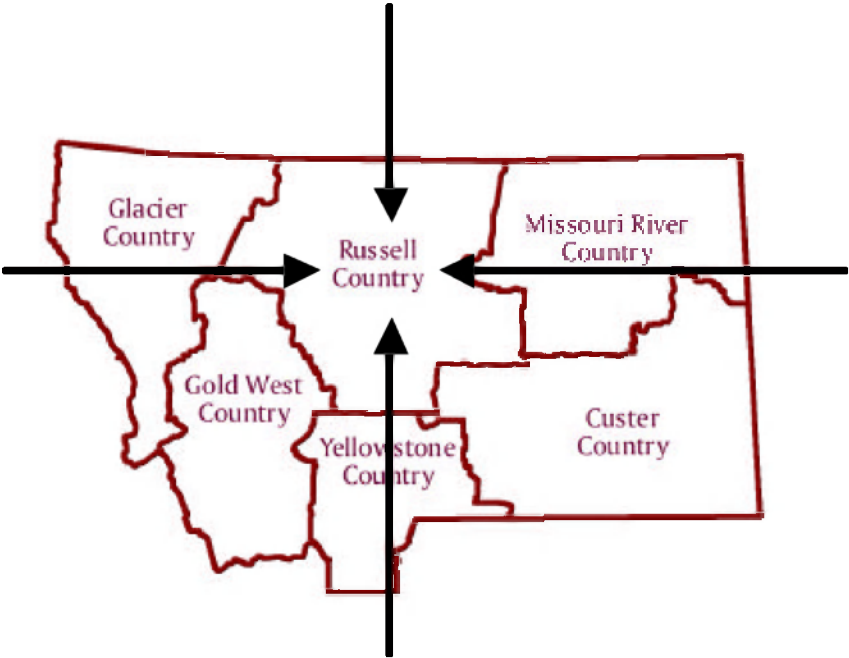
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Attraction Visitors in Russell Country Travel Region



Research Report 2003-7
April 2003

**Institute for Tourism &
Recreation Research**

School of Forestry
32 Campus Dr. #1234
The University of Montana
Missoula, MT 59812

Phone (406) 243-5686
Fax (406) 243-4845
www.forestry.umt.edu/itrr

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By
Norma Nickerson, Ph.D.
Bethany Sutton, M.S.

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Institute for Tourism & Recreation Research
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The University of Montana
Missoula, MT 59812
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Special thanks to our Russell Country surveyor, David Romenesko, 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 Russell Country Travel Region

Visitors to Russell Country Travel Region were intercepted at area attractions from June 15 through August 15, 2002. A total of 400 surveys were completed.

- The most common primary purpose for visiting Russell Country was vacation (43%) followed by visiting friends and relatives (25%). Interestingly, 18 percent indicated “other” as their primary reason for visiting the region. “Other” includes special events such as festivals, or personal events such as weddings and reunions.
- Visitors stayed an average of 7.48 nights in Montana and 4.02 nights in Russell Country.
- The most common sources of information were family or friends (36%) and none of the information sources mentioned (21%).
- Most Russell Country visitors were from out of the state (74%), primarily from Washington (13%) and California (12%). Twenty percent were Montana residents and six percent were from other countries.
- Travel groups were mainly couples (37%) and families (34%) but 75 percent of visitors were not traveling with children under 18 years of age.
- Not quite half (49%) of Russell Country attraction visitors had visited the region before indicating a majority who were new to the region.
- Fifty-one percent of all Russell Country attraction visitors went to the Lewis & Clark Interpretive Center followed by 36 percent who went to the Charlie Russell Museum.
- Visitors who stopped at more than one attraction chose attractions geographically close to one another rather than by theme such as Lewis & Clark.
- Visiting museums was engaged in by 50 percent of all attraction visitors.
- Activity patterns of Russell Country attraction visitors fell into six main groupings: 1) In and out-of-doors activities with people who visited museums, shopped, hiked, took pictures, and watched wildlife; 2) Water recreation activities; 3) Outdoor enthusiasts who camped, backpacked, kayaked or canoed, and hiked; 4) Sporting events; 5) General recreation; and 6) Town spenders which included shopping and gambling.
- Thirty-nine percent of visitors to Russell Country attractions did not visit a National Park on their trip. Of those who did, 45 percent visited Glacier and 30 percent visited Yellowstone.
- Russell Country attraction visitors who visited a National Park stayed an average of 8.43 nights in Montana and 3.99 nights in the region. Russell Country attraction visitors who did not visit a National Park stayed an average of 5.84 nights in Montana and 4.08 nights in the region.
- The majority of visitors to Russell Country attractions (55%) planned all or most of the places they would visit ahead of time, yet 41 percent planned the visit to the site they were intercepted within a short time period of one to seven days.
- Nineteen percent flew into Montana on their trip with the majority arriving in Great Falls (62%).
- More non-park visitors had visited Russell Country before (60%) than park visitors (43%).
- Park visitors are more likely to have higher household income than non-park visitors.
- While 58 percent of park visitors visited museums in Russell Country, only 37 percent of non-park visitors did the same indicating that museums are a more likely attraction for park visitors.

Chapter 1

Attraction Visitors in Russell Country Travel Region

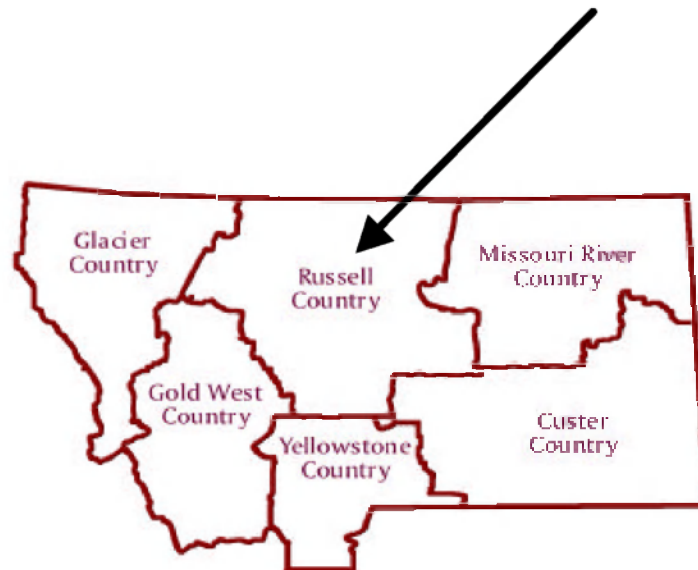
Introduction

The purpose of this study was to assess summer visitor characteristics of those who stopped at attractions in Russell Country. The study is one part of a six-region visitor survey. Each travel region had nine to twelve 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 Russell Country Travel Region.



Methodology

Travelers who were visiting attractions in Russell Country Travel Region were intercepted during the summer of 2002 at area attractions. Both residents of Montana who reside outside of Russell Country region 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.

Intercepted visitors were asked to complete a one-page (front and back) 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.

Completed surveys for Russell Country totaled 400.

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

- BLM Visitor Center (13)
- Charlie Russell Chew Choo (21)
- C.M. Russell Museum (38)
- Coal Banks Landing (25)
- Fort Benton Steamboat Levee (19)
- Giant Springs Heritage State Park (37)
- Havre Beneath the Streets (32)
- James Kipp Recreation Area (21)
- Lewis & Clark Interpretive Center (91)
- Montana Agriculture Museum (18)
- Old Trail Museum (49)
- Ulm Pishkun State Park (36)

This random sample represents visitors to Russell Country who stopped at attractions while visiting.

Chapter 2

Results

The results from attraction visitors in Russell Country Travel Region are presented in table and figure format in this chapter with a brief discussion or explanation following each table.

Table 1: Reasons for Visiting Russell Country

	All Reasons* (N)	All Reasons* (%)	Primary Reason (N)	Primary Reason (%)
Vacation/Pleasure	241	60%	169	43%
Visiting Friends/Relatives	115	29%	98	25%
Passing Through	47	12%	31	8%
Business/Conference	26	7%	22	6%
Shopping	1	<1%	1	<1%
Other	81	20%	68	18%

*Respondents could indicate more than one reason.

Visitors to Russell Country who spend some time at the region's attractions are mostly visiting the region for vacation (60% all reason, 43% primary) followed by over a quarter visiting the area for friends and relatives (29% all reason, 25% primary). Very few people who are passing through are spending any time at attractions in the region (12%).

Table 2: Accommodations and Length of Stay

Average Nights in Montana		7.48	
Average Nights in Russell Country		4.02	
		N	%
Percent of Respondents using each type of Accommodation*	Hotel/motel/bed & breakfast	176	44%
	Camping, public campground	109	27%
	Home of friend or relative	71	18%
	Camping, private campground	21	5%
	Vehicle in parking area	19	5%
	Guest ranch	2	1%
	Resort/Condominium	2	1%
	Rented cabin/home	1	<1%
	Private cabin/Second home	-	-
	Other	5	1%
Did not spend any nights in Russell Country		34	9%

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

Visitors who spend time at Russell Country attractions are spending 4.02 nights in the region. Most (91%) are spending at least one night in the region indicating that only nine percent are day trippers to Russell Country. Forty-four percent spend at least one night in a motel or bed & breakfast and 27 percent spend at least one night camping in a public campground. Only five percent spend a night in a private campground while in Russell Country, but 18 percent stay at the home of a friend or relative.

Table 3: Attractions Visited in Russell Country*

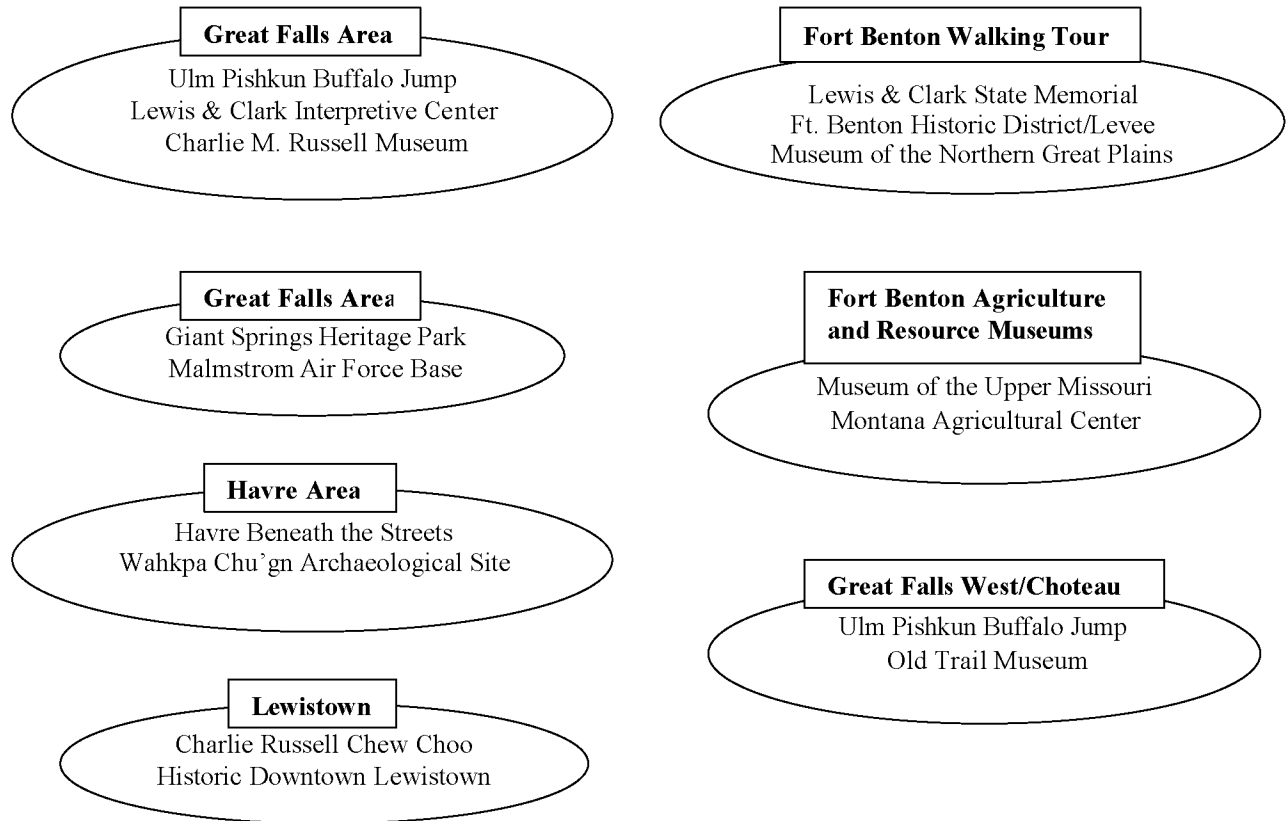
Site**	N	%	Site	N	%
Lewis & Clark Interpretive Center	203	51%	Castle Mansion & Meagher County Museum	4	1%
Charlie M. Russell Museum	145	36%	Central MT Historical Museum	4	1%
Giant Springs Heritage State Park	72	18%	Freezout Lake/Waterfowl Refuge	4	1%
Ulm Pishkun Buffalo Jump	59	15%	H. Earl Clack Museum/Heritage Center	4	1%
Old Trail Museum	55	14%	High Plains Heritage Center	4	1%
Fort Benton Historic District/Levee	48	12%	Lewis & Clark National Forest	4	1%
Havre Beneath the Streets	39	10%	Belt Museum	3	1%
Museum of the Upper Missouri	34	9%	Charles M. Bair Family Museum	3	1%
Coal Banks Landing	30	8%	Geraldine Milwaukee Depot	3	1%
Lewis & Clark State Memorial	27	7%	House of a Thousand Dolls	3	1%
Montana Agricultural Center	27	7%	Judith Peak Recreational Area	3	1%
James Kipp Recreation Area	25	6%	Rudyard Depot Museum	3	1%
Bureau of Land Management Visitor Center	23	6%	Boone & Crockett's Roosevelt Ranch	2	1%
Charlie Russell Chew Choo	21	5%	Chief Joseph Park	2	1%
Malmstrom Air Force Base	21	5%	Earth Science Museum	2	1%
Wahkpa Chu'gn Archaeological Site	12	3%	Fort Shaw	2	1%
Museum of the Northern Great Plains	11	3%	Lake Frances	2	1%
Bob Marshall Wilderness	10	3%	Liberty County Museum	2	1%
Paris Gibson Museum of Art	9	2%	Mehmke's Steam Engine Museum	2	1%
Virgelle Ferry Crossing	9	2%	Montana Cowboy's Bar & Museum	2	1%
Lewistown Historic Downtown	8	2%	Toole County Library	2	1%
Big Spring	6	2%	Children's Museum of Montana	1	<1%
Big Sandy Historical Society Museum	5	1%	Jawbone Creek Country Club	1	<1%
Blaine County Museum/Bear Paw Battlefield	5	1%	Marias Museum of Art & History	1	<1%
Fort Assiniboine Historic Site	5	1%	Nature Conservancy	1	<1%
Lewistown Art Center	5	1%			

*Liberty Village Arts Center & Gallery, Electric City Water Park, Electric Train & Upper Musselshell Museum, Judith Basin Museum, Utica Museum, Prairie Past Museum, Gee Bee R-2 Replica Airplane, and Lake Elwell 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 stop at attractions in Russell Country are the Lewis & Clark Interpretive Center (51%) and the Charlie M. Russell Museum (36%). After the top two, attractions in Russell Country were not visited in great numbers. The next highest visitation rate was 18 percent; these respondents went to Giant Springs Heritage State Park.

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. 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 Coal Banks Landing, James Kipp Recreation Area, and the BLM Visitor Center.

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 Russell Country

Source*	N	%	Source	N	%
Family or friends	145	36%	Magazine/Newspaper Article	28	7%
None of these sources	83	21%	Russell Travel Guide	21	5%
Brochure Rack	56	14%	MT Travel Info Phone Number	7	2%
Auto Club (e.g. AAA)	55	14%	Billboards	3	1%
Internet	55	14%	Private Businesses	3	1%
MT Travel Planner	39	10%	Travel Agency	3	1%
Chamber of Commerce/ Visitor Bureau	36	9%	Regional Travel Info Phone Number	2	1%
Guide Book	31	8%			

*Respondents could indicate more than one source.

The main information source used by visitors to attractions in Russell Country was family and friends (36%), while one-fifth (21%) of the attraction visitors did not use any of the sources listed. Fourteen percent used brochures from a brochure rack, or an auto club, or the Internet.

Table 5: Activities Participated in While in Russell Country

Activity*	N	%	Activity*	N	%
Visiting Museums	200	50%	Gambling	26	7%
Photography	155	39%	Golfing	19	5%
Shopping	132	33%	Sporting Event	18	5%
Wildlife Viewing	128	32%	Road/tour Biking	17	4%
Hiking	113	28%	Backpacking	10	3%
Camping	101	25%	Horseback Riding	10	3%
Picnicking	61	15%	Motor-boating/Water-skiing	7	2%
Fishing/Fly Fishing	59	15%	Mountain Biking	6	2%
Other Activity	57	14%	Rockhounding	4	1%
Canoeing/Kayaking	36	9%	Off-highway Riding/ATV	2	1%
River Rafting/Floating	36	9%	Sailing/Windsurfing	-	-
Special Event/Festival	36	9%			

*Respondents could indicate more than one activity.

Figure 2: Russell Country Activity Patterns – Results of Factor Analysis

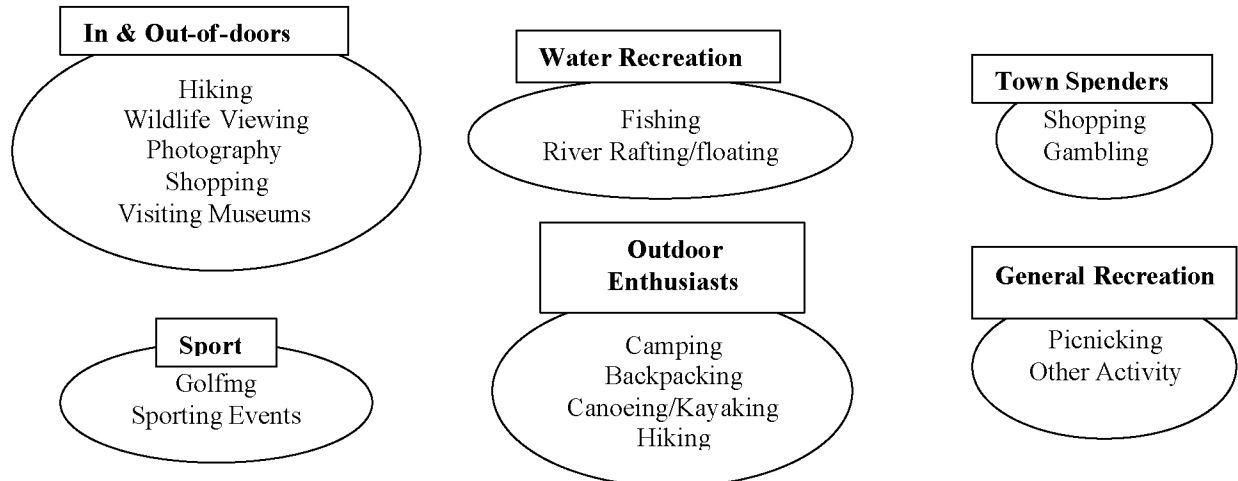


Table 5 and Figure 2 provide a look at activities in which visitors to attractions in the region participated. Six different activities saw at least one quarter of the visitors participating. The top activity, visiting museums, was partially a result of the survey locations. However, four of the six top activities were outdoor activities of camping, hiking, wildlife viewing and photography. When factor analysis was conducted to get a better understanding of the types of activities that group together, it showed that six distinct groupings emerged. The group with the greatest number of activities, the “in & out-of-doors” group, liked to combine outdoor activities of hiking, wildlife viewing and photography, with in-town activities of visiting museums and shopping. This was by far the most versatile group. Other activity groups centered around outdoors, water recreation, sports, general activities, and town shopping or gambling.

Table 6: Attraction Visitors Place of Residence

	N	%
MT County	78	20%
US State	289	74%
Foreign Country	24	6%
	391	100%
MT County*		20%
Missoula	13	17%
Yellowstone	12	16%
Flathead, Gallatin	9	12%
US State*		74%
Washington	38	13%
California	35	12%
Oregon	15	5%
Florida	14	5%
Idaho	13	5%
Foreign Country*		6%
Canada: Alberta	8	33%
Germany	5	21%
Canada: British Columbia, England/UK/Wales	3	13%

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

People who visited attractions in Russell Country are most likely to be from out-of-state (74%) followed by visitors from Montana but outside the region. Residents from Missoula County and Yellowstone County are the two most frequent visitors to Russell Country from the state. Nonresidents of the state are more likely to be from Washington (13%) or California (12%).

Table 7: Characteristics of Visitors to Russell Country Attractions

		N	%
Travel Group Type	Couple	148	37%
	Family	136	34%
	Self	37	9%
	Family & Friends	34	9%
	Friends	27	7%
	Organized Group/Club	11	3%
	Business Associates	5	1%
Travel Group Size	Adults: 1	44	11%
	2	246	61%
	3	40	10%
	4+	70	17%
	Children: 0	302	75%
	1	34	9%
	2	35	9%
	3	12	3%
	4+	19	5%
Visited Russell Country Before?	Yes	198	49%
Visited National Parks?	Glacier National Park	181	45%
	Yellowstone National Park	120	30%
	Did not visit either park	156	39%
Travel Plans	All places were planned in advance	66	17%
	Most places were planned	149	38%
	Planned a few places	101	26%
	No definite plans	77	20%
When Were Plans Made to Visit the Site Where Survey was Completed?	Today	72	18%
	1-7 days ago	91	23%
	1-4 weeks ago	45	11%
	1-6 months ago	117	29%
	Over 6 months ago	74	19%
Fly into MT on Trip?	Yes	76	19%
Flew into Which City?	Great Falls	45	62%
	Billings	11	15%
	Bozeman	8	11%
	Kalispell	4	6%
	Helena	2	3%
	Missoula	2	3%
	Butte	1	1%
	West Yellowstone	-	-
Household Income	Less than \$20K	14	5%
	\$20K – \$39,999	36	13%
	\$40K – \$59,999	68	25%
	\$60K – \$79,999	68	25%
	\$80K – \$99,999	35	13%
	\$100K +	57	21%

Visitors to Russell Country attractions were more likely to arrive as couples (37%) closely followed by families (34%). However, only 25 percent indicated they were traveling with children under 18. Fifty-one percent were visiting Russell Country for the first time and 19 percent flew into Montana with 62 percent

of those flying into Great Falls. Only 39 percent of those who visited attractions in Russell Country did not visit a national park. Forty-five percent visited Glacier National Park while 30 percent visited Yellowstone National Park. Fifty percent of all visitors had incomes between \$40K and \$80K. Fifty-five percent said that all or most attraction sites were planned in advance of their visit, but 46 percent were quite flexible in their travel plans. The highest percent (29%) planned to visit the site where they were surveyed at least 1-6 months before, however 41 percent of the visitors made the decision within a week.

The following analysis provides a comparison of visitors who visited either Glacier National Park or Yellowstone National Park to those who did not visit either park. Sixty-one 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 (61%)		Non-park Visitor (39%)	
Length of Stay	Average nights in Montana	8.43		5.84	
	Average nights in Russell Country	3.99		4.08	
Travel Group	Average number of adults	3.94		3.14	
	Average number of children	0.66		1.04	
		N	%	N	%
	Couple	93	38%	55	36%
	Family	87	36%	49	32%
	Family & Friends	20	8%	14	9%
	Self	18	7%	19	12%
	Friends	15	6%	12	8%
	Organized Group/Club	6	3%	5	3%
	Business Associates	5	2%	-	-
Visited Russell Country Before?	Yes	105	43%	93	60%
Travel Plan Flexibility	All places were planned in advance	34	14%	32	21%
	Most places were planned	102	43%	47	30%
	Planned a few places	62	26%	39	25%
	No definite plans	40	17%	37	24%
When Were Plans Made to Visit the Site Where Survey was Completed?	Today	50	21%	22	14%
	1-7 days ago	55	23%	36	23%
	1-4 weeks ago	29	12%	16	10%
	1-6 months ago	73	30%	44	28%
	Over 6 months ago	37	15%	37	24%
Fly into MT on Trip?	Yes	49	20%	27	17%
Household Income	Less than \$20K	9	5%	5	5%
	\$20K - \$39,999	19	11%	17	16%
	\$40K - \$59,999	39	23%	29	27%
	\$60K - \$79,999	45	26%	23	22%
	\$80K - \$99,999	24	14%	11	10%
	\$100K +	35	21%	22	21%

Some differences are seen between park and non-park visitors to Russell Country attractions. First of all, non-park visitors are more likely to be repeat visitors of Russell Country (60%) compared to park visitors (43%). However, while park visitors spend more time in Montana (8.43 nights compared to 5.84 nights), non-park visitors spend more of their time in Russell Country (4.08 nights or 70% of their Montana time is

spent in Russell Country). The other noticeable difference is in household income where 61 percent of park visitors earn over \$60,000 but only 53 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	143	58%	57	37%
Photography	110	45%	45	29%
Shopping	89	36%	43	28%
Wildlife Viewing	86	35%	42	27%
Hiking	70	29%	43	28%
Camping	54	22%	47	30%
Picnicking	40	16%	21	14%
Fishing/Fly Fishing	33	13%	26	17%
Other Activity	32	13%	25	16%
Special Events/Festivals	23	9%	13	8%
Gambling	20	8%	6	4%
River Rafting/Floating	18	7%	18	12%
Golfing	16	7%	3	2%
Canoeing/Kayaking	14	6%	22	14%
Sporting Event	13	5%	5	3%
Road/tour Biking	10	4%	7	5%
Horseback Riding	9	4%	1	1%
Backpacking	8	3%	2	1%
Motor-boating/Water-skiing	3	1%	4	3%
Mountain Biking	3	1%	3	2%
Rockhounding	2	1%	2	1%
Off-highway riding/ATV	-	-	2	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. While visiting museums and photography are the top two activities for both groups, park visitors were more likely to engage in those activities (58% and 45%). In terms of information sources used, both groups used family and friends more than any other source, but 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.

Table 10: Park and Non-park Visitor Information Sources

Source*	Park Visitor		Non-park Visitor	
	N	%	N	%
Info from Family and Friends	84	34%	61	39%
Auto Club (e.g. AAA)	44	18%	11	7%
None of These Sources	44	18%	39	25%
Internet	37	15%	18	12%
Brochure Rack	33	13%	23	15%
Montana Travel Planner	28	11%	11	7%
Guide Book	23	9%	8	5%
Chamber of Commerce/Visitor Bureau	21	9%	15	10%
Magazine/Newspaper Article	14	6%	14	9%
Russell Country Travel Guide	12	5%	9	6%
State Travel Info Number	5	2%	2	1%
Billboards	2	1%	1	1%
Travel Agency	2	1%	1	1%
Private Businesses	1	<1%	2	1%
Regional Travel Info Number	1	<1%	1	1%

*Respondents could indicate more than one information source.

Chapter 3

Summary and Discussion

Summary

Results of the Russell Country regional travel study highlight a variety of travel patterns and characteristics of visitors to attractions in the region. This section summarizes the travel characteristics of attraction visitors to Russell 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 Russell Country was vacation (43%) with visiting friends and relatives being the next most popular reason for visiting (25%). Visitors to Russell Country attractions stayed an average of 7.48 nights in Montana and 4.02 nights in the region. Many visitors to Russell Country attractions stayed at least one night in a hotel, motel, or bed and breakfast (44%). While 27 percent camped at least one night in a public campground, only five percent camped in a private campground. Additionally, 18 percent spent at least one night in the home of friends or family.

Nineteen percent of visitors to Russell Country attractions flew on their trip. Of those who flew, most arrived at the Great Falls airport (62%). The majority (55%) indicated that they had planned all or most of the places they would visit on their trip but 46 percent only planned a few places or had no definite plans indicating a flexible visitor group. Forty-one percent decided within a week to visit the site where they were intercepted. Family and friends were used the most as an information source (36%), followed by those who indicated using no sources or sources other than those asked (21%).

Visitor Behavior

In Russell Country, visiting museums was the activity participated in the most (50%). While some may attribute this high visitation number to the sampling scheme, only four of the twelve sampling sites were at museums. Photography was the next most popular activity engaged in (39%) followed by shopping (33%) and wildlife viewing (32%).

The two most visited attractions in Russell Country were the Lewis and Clark Interpretive Center (50%) and the Charlie M. Russell Museum (36%). After those two sites, the next most visited site was Giant Springs Heritage State Park, visited by only 18 percent of the visitors.

Visitor Characteristics

Visitors to Russell Country attractions were primarily couples (37%) and families (34%) but three quarters did not travel with children under 18 years of age. A little less than half of the visitors to Russell Country had visited the region before (49%) indicating a very high percent of first time visitors to the area. While in Montana, 61 percent of the attraction visitors to

Russell Country visited a national park. Of those visitors, most went to Glacier National Park (45%) followed by 30 percent who visited Yellowstone National Park. Interestingly, only 16 percent visited both national parks which indicates that visitors to Russell Country are much less likely to be traveling the Yellowstone-to-Glacier route.

Most visitors to Russell Country attractions were non-residents visiting from a different state (74%). The most represented states were Washington state (13%) and California (12%). However, resident visitors did account for 20 percent of visitors, mostly from Missoula and Yellowstone Counties. Visitors from foreign countries accounted for six percent of Russell Country visitors with most traveling from Canada.

Russell Country attraction visitors were most likely to earn \$40,000 to \$80,000 (50%).

Park and Non-park Visitors

Visitors to Russell Country attractions who visited a National Park stayed an average of 8.43 nights in Montana and 3.99 nights in Russell Country whereas visitors who did not visit a National Park stayed an average of 5.84 nights in Montana and 4.08 nights in Russell Country. Sixty percent of non-park visitors had visited Russell Country before but only 43 percent of park visitors had visited the region in the past.

Both park visitors and non-park visitors participated in visiting museums as the most common activity (58% and 37% respectively) followed by participating in photography (45% and 29% respectively). Camping was a more popular activity among non-park visitors (30%; 22% for park visitors) as was river rafting/floating (12%; 7% for park visitors) and canoeing/kayaking (14%; 6% for park visitors). Park visitors participated more in wildlife viewing (35%; 27% for non-park visitors) and shopping (36%; 28% for non-park visitors).

Household income was generally higher for park visitors than non-park visitors. Sixty-one percent of park visitors earn \$60,000 or more whereas 53 percent of non-park visitors earn as much. Sixteen percent of park visitors earn less than \$40,000 whereas 21 percent of non-park visitors earn as much.

Discussion and Marketing Recommendations

This study provides information about visitors to Russell Country who visit attractions within the region. Various marketing strategies can be gleaned from the data provided. First, one of the main marketing strategies of most destinations is to extend the length of stay. Those who visit attractions are staying four nights in the region, which is a fairly lengthy stay (only four other nights are spent in the rest of the state). However, when looking closer at the park visitor and the non-park visitor, both groups stay in Russell Country for about 4 nights, but only the park visitor stays longer in the state. In other words, while it would benefit the state to promote to people interested in visiting a national park, it makes no difference for Russell Country length of stay. On the other hand, park visitors are more active in activities that tend to drop dollars in the region including visiting museums, shopping, attending special events and festivals, gambling, and golfing. Therefore, it is still recommended that Russell Country use the national parks in their promotions, but it does not have to be the main focus each time.

In terms of promotional ideas, the factor analysis of the attractions and the activities provided some insight into what groups of attractions and groups of activities should be promoted together. First of all, the factor analysis of attractions revealed seven factors where the variables had a relationship with one another. Interestingly, all the variables within the factors were geographically tied to one another. It appears that marketing promotions concentrating

on what is available in a community will provide increased interest and possibly increased visitation. While it makes sense that visitors will visit similar areas, this study solidified that thought. One simple but effective way to encourage and perhaps increase visitation at the region attractions is for the museum employees and volunteers to recommend other nearby museums to their visitors. Many times it is simply the power of suggestion that will entice people. It is also recommended that attractions in an area provide “package” tickets where people can buy one ticket for admission into all the attractions within a geographic area. Not only does the visitor get a special on the price, they are introduced to other attractions that they may not have even heard about before purchasing the package. For those visitors who are flexible in their plans, it is likely they will visit another attraction and stay one day longer. Since nearly 50 percent of the visitors to attractions indicated they were very flexible with their travel plans, it is likely that any form of persuasion once the visitor has arrived will be successful.

The factor analysis of activities provided some insight into groupings of activities engaged in by visitors and suggests that each of these groupings are likely promotional themes.

1. The “In and Out-of-Doors” group included the in-town activities of shopping and visiting museums along with the outdoor activities of hiking, photography and wildlife viewing. It gives the impression that people want the “outdoor opportunities” near their town opportunities. These outdoor activities are generally not strenuous. Rather, this is a group that enjoys a more relaxed but active lifestyle.
2. The “Outdoor Enthusiasts” are more likely to respond to promotions where camping, hiking, backpacking, and canoeing or kayaking are prevalent. These people are not interested in the activities within a community. They are looking strictly for the outdoor experience.
3. In addition to the #2 above, the “Water Recreation” group is only interested in what water sports can be offered, especially fishing and river rafting or floating.
4. There are always those groups who come to town to spend money – hence we have the “Town Spenders” whose main activities include shopping and gambling. While shopping fits into the lifestyle of 33 percent of the visitors, gambling was only engaged in by seven percent suggesting that a promotional focus on gambling will not necessarily be successful.
5. “Sports,” which included golf and sporting events, could be a promotional theme; however, it was only five percent of the visitors who participated so spending dollars on this theme may not be as fruitful.
6. “Relaxed Recreation” includes people who want to picnic and engage in other activities probably related to picnicking such as visiting with one another, frisbee, and family fun.

One interesting finding related to people who visit attractions in Russell Country is the lack of children on the trip. A full 75 percent of attraction visitors are without children under 18 years of age. While this is not a complete surprise as the aging of America continues, it does suggest that Russell Country is not perceived as offering children’s activities. If the region has a desire to change that perception, a great deal of promotion will have to take place showing the kinds of activities kids like. However, caution is suggested unless there are truly many entertainment places for children. From a child’s viewpoint, museums are not at the top of their list for a fun afternoon excursion. Many of the attractions in Russell Country are museums and until those museums become interactive and provide things for kids to do, the children and parents with them will tend to stay away. Recognizing the current adult visitor, however, is an important vehicle toward success. Promotions should show adults, young, middle-age and old, engaging in the activities suggested through the factor analysis results. It may even be a strategic move to restrict the percent of promotions that use kids and focus most advertising showing adults having fun without children.

The most intriguing finding of this study was the lack of information sources used by people who visited attractions in Russell Country. While family and friends was the information source used the most, it still showed that only 36 percent received information from this source. Twenty-one percent admitted to using none of the sources. Perhaps one explanation is that 20 percent of the visitors already live in Montana. These people are likely to already know what to do while in the region. Yet, only 49 percent have been to Russell Country in the past. Usually people who are exploring new areas gather a great deal of information about what to do on their trip. People visiting attractions in Russell Country are not engaging in information search activities like the average traveler. Because it is unclear where the traveler is getting their information, it is recommended that research into this phenomenon be conducted. In-depth interviews or even focus groups could provide insight into this traveler.

It is also noted, however, that nearly half of the visitors to Russell Country attractions are quite flexible in their travel plans. This suggests that brochures, in-state signs, and recommendations by service people could be effective in keeping visitors in the region longer. In addition, 14 percent did use an auto club like AAA for information. Therefore, it is recommended to get as many museums and attractions in the region AAA approved. This "seal of approval" can go a long way to suggesting visitation to attractions in the region.

Finally, since 29 percent of the visitors are visiting the region because of family and friends in the area, it is important that local residents are aware and take advantage of the opportunities in their back yard. Many attractions around the country provide season passes or discount tickets to residents. This encourages the locals to take their visitors to places where they do not have to continue paying admission fees themselves. The nonresidents, of course, would be required to pay admission.

In summary, the findings in this report have categorized the visitor to Russell Country Travel Region who visited one or more attractions within the region. By understanding who the visitors are and what the visitors participate in while in the region, marketing strategies can be organized to influence even more visitors to stay and play in the region.

Appendix

A

Survey Instrument



2002 SUMMER TRAVEL STUDY

RUSSELL COUNTRY TRAVEL REGION, MONTANA

NOTE: This survey pertains only to the Russell Country travel region of Montana. If you are unsure about what cities and places are located within this region, you can consult the map pictured on your clipboard. Please use the attached pencil to mark your responses. If you make a mistake, please erase completely to change your answer. Thank you for your time!

1) What are your reasons for being in the Russell Country region of Montana? (Please fill in circles for all that apply.)

- ① Vacation/recreation/pleasure ③ Just passing through ⑤ Visiting friends, relatives/family event
 ② Business/conference ④ Shopping ⑥ Other

2) Of the reasons you marked in (1), which represents your primary reason for visiting Russell Country? (Please fill in only one circle.)

- ① ② ③ ④ ⑤ ⑥

3) Have you ever visited the Russell Country region of Montana before this trip? ① Yes ② No

4) On this trip, which of the following Russell Country attractions have you visited or do you plan to visit? (Please fill in circles for all that apply.)

Chester

- Liberty County Museum
 Liberty Village Arts Center & Gallery

Choteau Area

- Old Trail Museum
 Freezeout Lake/Waterfowl Refuge
 Nature Conservancy
 Bob Marshall Wilderness
 Boone & Crockett's Roosevelt Ranch (Dupuyer)
 Lake Frances (Valier)

Fort Benton Area

- Lewis and Clark State Memorial
 Museum of the Upper Missouri
 Museum of the Northern Great Plains
 Montana Agricultural Center
 Bureau of Land Management Visitor Center
 Fort Benton Historic District/Levee
 Earth Science Museum (Loma)
 House of a Thousand Dolls (Loma)
 Virgelle Ferry Crossing
 Coal Banks Landing
 Geraldine Milwaukee Depot
 Big Sandy Historical Society Museum

Great Falls Area

- Ulm Pishkun Buffalo Jump
 Fort Shaw
 Giant Springs Heritage State Park
 Electric City Water Park
 Malmstrom Air Force Base
 Charlie M. Russell Museum
 Paris Gibson Museum of Art
 Mehmke's Steam Engine Museum
 Children's Museum of Montana
 Montana Cowboy's Bar and Museum
 High Plains Heritage Center
 Lewis and Clark Interpretive Center
 Belt Museum

Harlowton Area

- Electric Train & Upper Musselshell Museum
 Chief Joseph Park
 Jawbone Creek Country Club
 Charles M. Bair Family Museum

Stanford/Utica

- Judith Basin Museum
 Utica Museum
 Prairie Past Museum
 Lewis and Clark National Forest

Havre Area

- Fort Assiniboine Historic Site
 Blaine County Museum/Bear Paw Battlefield
 Havre Beneath the Streets
 H. Earl Clack Museum/Heritage Center
 Wahkpa Chu'gn Archaeological Site
 Rudyard Depot Museum

Lewistown

- Historic Downtown
 Central Montana Historical Museum
 Lewistown Art Center
 Judith Peak Recreational Area
 Big Spring
 Charlie Russell Chew Choo
 James Kipp Recreation Area

Shelby

- Marias Museum of Art and History
 Gee Bee R-2 Replica Airplane
 Toole County Library
 Lake Elwell

White Sulphur Springs

- Castle Mansion and Meagher County Museum

5) On this trip, which of the following activities have you or a member of your travel group participated in while in Russell Country?

(Please fill in circles for all that apply.)

- Backpacking Road/tour biking Fishing/fly fishing Gambling
 Camping Off-highway riding/ATV River rafting/floating Visit museums
 Hiking Wildlife viewing Canoeing/kayaking Special event/festival
 Horseback riding Photography Sailing/windsurfing Sporting event
 Rockhounding Golfing Motor-boating/water-skiing Other activity
 Mountain biking Picnicking Shopping

☺ Over Please ☺

6) On this trip, what is the total number of nights that you plan to stay in Montana?
Total number of nights in Montana: _____ (if you are spending NO nights in Montana, please skip to question 9.)

7) On this trip, what is the total number of nights that you plan to stay in Russell Country?
(Please refer to map on clipboard if you are unsure which locations fall within Russell Country.)
Total number of nights in Russell Country: _____ (if you are spending NO nights in Russell Country, please skip to question 9.)

8) On this trip, which of the following accommodation types have you used or plan to use for your nights in Russell Country?

(Please fill in circles for all that apply.)

- | | | |
|-------------------------------|----------------------|-----------------------------|
| ① Hotel/motel/bed & breakfast | ⑤ Guest ranch | ⑧ Private cabin/second home |
| ② Camping, private campground | ⑥ Resort/condominium | ⑨ Vehicle in parking area |
| ③ Camping, public campground | ⑦ Rented cabin/home | ⑩ Other |
| ④ Home of friend or relative | | |

9) Where did you get information regarding your stops in Russell Country? (Please fill in circles for all that apply.)

- | | | |
|-----------------------------------|--------------------------------------|---------------------------------------|
| ① Internet travel information | ⑥ Brochure rack | ⑪ Information from private businesses |
| ② Automobile club (e.g. AAA) | ⑦ Billboards | ⑫ Information from family or friends |
| ③ Guide book (not auto club book) | ⑧ State travel information number | ⑬ Travel agency |
| ④ Montana Travel Planner | ⑨ Regional travel information number | ⑭ Magazine/newspaper article |
| ⑤ Russell Travel Guide | ⑩ Chamber of Commerce/Visitor Bureau | ⑮ None of these sources were used |

10) How long ago did you make plans to visit this site? (Please fill in only one circle.)

- | | | |
|----------------|------------------|---------------------|
| ① Today | ③ 1-4 weeks ago | ⑤ Over 6 months ago |
| ② 1-7 days ago | ④ 1-6 months ago | |

11) Which of the following options best describes your travel plans on this trip?

(Please fill in only the circle that best corresponds to your plans.)

- ① All the places we want to visit have been planned in advance.
- ② Most places we want to visit have already been planned, but we might make unplanned stops.
- ③ We have only made plans to visit a few places, so we are quite flexible.
- ④ We have not made definite plans to visit any places, so we are very flexible.

12) Did you fly into Montana for this trip?

- ① Yes
- ② No

If yes, which city did you fly into?

- | | | | | | | | |
|------------|-----------|---------|---------------|----------|------------|--------------------|-------------|
| ① Billings | ② Bozeman | ③ Butte | ④ Great Falls | ⑤ Helena | ⑥ Missoula | ⑦ West Yellowstone | ⑧ Kalispell |
|------------|-----------|---------|---------------|----------|------------|--------------------|-------------|

13) On this trip, have you visited or do you plan to visit the following parks? (Please fill in circles for all that apply.)

- | | | |
|-------------------------|-----------------------------|----------------|
| ① Glacier National Park | ② Yellowstone National Park | ③ Neither park |
|-------------------------|-----------------------------|----------------|

14) Which of the following options best describes your travel group? (Please fill in only one circle.)

- | | | | |
|----------|-----------|-----------------------|------------------------|
| ① Self | ③ Family | ⑤ Family & friends | ⑦ Organized group/club |
| ② Couple | ④ Friends | ⑥ Business associates | |

15) How many adults are in your travel group? _____ Number of adults

16) How many children under 18 years old are in your travel group? _____ Number of children

17) Of what Montana county, U.S. state or Canadian province/foreign country are you currently a permanent resident?

Permanent Residence _____ Zip Code _____

18) Which of the following categories best describes your annual household income in US dollars?

(Please fill in only one circle.)

- | | | |
|------------------------|------------------------|------------------------|
| ① Less than \$20,000 | ② \$40,000 to \$59,999 | ⑤ \$80,000 to \$99,999 |
| ② \$20,000 to \$39,999 | ④ \$60,000 to \$79,999 | ⑥ \$100,000 or more |