

University of Montana

## ScholarWorks at University of Montana

---

Institute for Tourism and Recreation Research  
Publications

Institute for Tourism and Recreation Research

---

3-1-2003

### Attraction Visitors in Glacier Country Travel Region

Norma P. Nickerson

*The University of Montana-Missoula*

Bethany Sutton

*The University of Montana-Missoula*

Follow this and additional works at: [https://scholarworks.umt.edu/itrr\\_pubs](https://scholarworks.umt.edu/itrr_pubs)



Part of the [Economics Commons](#), [Leisure Studies Commons](#), [Marketing Commons](#), [Recreation, Parks and Tourism Administration Commons](#), and the [Tourism and Travel Commons](#)

**Let us know how access to this document benefits you.**

---

#### Recommended Citation

Nickerson, Norma P. and Sutton, Bethany, "Attraction Visitors in Glacier Country Travel Region" (2003).

*Institute for Tourism and Recreation Research Publications*. 182.

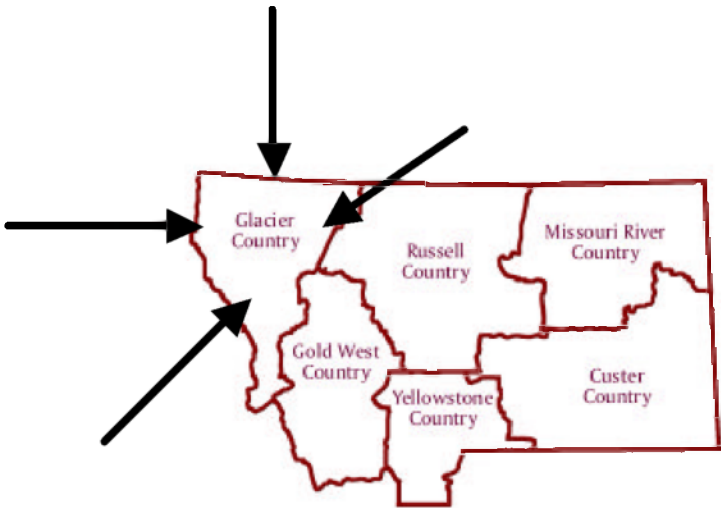
[https://scholarworks.umt.edu/itrr\\_pubs/182](https://scholarworks.umt.edu/itrr_pubs/182)

This Report is brought to you for free and open access by the Institute for Tourism and Recreation Research at ScholarWorks at University of Montana. It has been accepted for inclusion in Institute for Tourism and Recreation Research Publications by an authorized administrator of ScholarWorks at University of Montana. For more information, please contact [scholarworks@mso.umt.edu](mailto:scholarworks@mso.umt.edu).

---

# Attraction Visitors in Glacier Country Travel Region

---



Research Report 2003-6  
March 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](http://www.forestry.umt.edu/itrr)

---

# **Attraction Visitors in Glacier Country Travel Region**

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

Research Report 2003-6  
March 2003

Institute for Tourism & Recreation Research  
School of Forestry  
The University of Montana  
Missoula, MT 59812  
[www.forestry.umt.edu/itrr](http://www.forestry.umt.edu/itrr)

This study was funded by the Lodging Facility Use Tax

## Table of Contents

---

Acknowledgements.....	1
Executive Summary .....	2
Introduction .....	3
Methodology.....	4
Results.....	5
Summary and Discussion .....	14
Summary.....	14
Discussion and Marketing Recommendations .....	15
Survey .....	17

---

## List of Tables and Figures

---

Table 1: Reasons for Visiting Glacier Country .....	3
Table 2: Accommodations and Length of Stay .....	3
Table 3: Attractions Visited in Glacier Country .....	4
Table 4: Information Sources Used Before and During Trip.....	6
Table 5: Activities Participated in while in Glacier Country .....	6
Table 6: Where Glacier Country Vistiors are From.....	7
Table 7: Characteristics of Visitors to Glacier Country Attractions .....	8
Table 8: Park and Non-park Visitors: Comparison of Characteristics.....	9
Table 9: Park and Non-park Visitors: Activity Comparison .....	10
Table 10: Park and Non-park Visitors: Information Sources Used.....	11
Figure 1: Groups of Attractions Visited - Results of Factor Analysis.....	5
Figure 2: Activity Patterns – Results of Factor Analysis .....	6

---

## ***Acknowledgements***

We would like to acknowledge and thank our six surveyors for their hard work in intercepting visitors. Their kindness and professionalism were crucial to the success of this study. Without their hard work, dedication and eagerness to talk to travelers, we could not have obtained enough data to give meaningful results.

Special thanks to our Glacier Country surveyor, Colby Bowans, 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 Glacier Country Travel Region**

Visitors to Glacier Country were intercepted at area attractions from June 15 through August 15, 2002. A total of 757 surveys were completed.

- The most common primary reason for visiting Glacier Country was vacation (69%) followed by visiting friends and relatives (20%).
- Visitors to attractions in Glacier Country stayed an average of 7.5 nights in Montana and 5.26 nights in the region.
- Information sources most used were family or friends (36%) and the Internet (32%).
- Most visitors to Glacier Country attractions were from out of the state (86%) and primarily from Washington (15%) and California (11%). Eight percent were Montana residents and six percent were from foreign countries (mostly Canada).
- Sixty-three percent of visitor groups were not traveling with children.
- Slightly more than half of the visitors had been to Glacier Country before (54%).
- The majority of attraction visitors visited a national park, with 71 percent visiting Glacier and 24 percent visiting Yellowstone. Twenty-one percent of Glacier Country attraction visitors did not visit a National Park.
- Visitors either had planned most of the places they would visit (37%) or had planned a few of the places (33%). Plans were made 1-6 months in advance to visit the attraction where intercepted for 37 percent of visitors.
- Twenty-three percent of Glacier Country visitors flew on their trip. Forty-five percent of those flying arrived in Kalispell while 36 percent arrived in Missoula.
- Those visitors who visited a national park on their trip stayed longer than those visitors who did not: 8.01 nights in Montana and 5.63 nights in Glacier country for park visitors vs. 5.46 nights in Montana and 3.68 nights in Glacier Country for non-park visitors.
- Seventy-four percent of non-park visitors had been to Glacier Country before whereas only 49 percent of park visitors had visited the region in the past.
- Park visitors were less flexible since they had planned most of the places they would visit (41%) while non-park visitors had planned a few places (37%) or had no definite plans (26%).
- More park visitors flew on their trip (24%) than non-park visitors (17%).
- Park visitors obtained their information primarily from the Internet (37%) and family and friends (35%). Non-park visitors obtained their information primarily from family and friends (37%) and none of the sources mentioned or no sources (28%).
- Visitors who stopped at more than one attraction chose attractions geographically close to one another or similar types of attractions. Lewis & Clark sites, resort type attractions, arts & golf, and Montana heritage were some of the factors that emerged as themes of attractions visited by respondents.
- Activity patterns of Glacier Country attraction visitors fell into five main groupings: 1) "Active outdoors" which included hiking, backpacking, and camping; 2) "Relaxing recreation" which included visiting museums, photography, wildlife viewing, and picnicking; 3) "Resort Activities" which included golf and boating; 4) "Specialized/adventure sports" which included horseback riding, rock hounding, river rafting, and fishing, and; 5) "Special events" which included sporting events, festivals, and off highway/ATV activities. These activity groupings provide promotional theme ideas for Glacier Country Travel region.

# Chapter 1

## Attraction Visitors in Glacier Country Travel Region

### *Introduction*

The purpose of this study was to assess summer visitor characteristics of those who stopped at attractions in Glacier Country. The study was 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 of Montana and residents of Montana who reside in a different travel region than the one surveyed.

The study objectives include 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 based on attractions visited

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



# Methodology

Travelers to Glacier Country Travel Region visiting attractions were intercepted during the summer of 2002 at area attractions. Both residents of Montana who reside outside of Glacier 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 was conducted 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 a one-page survey (front and back) 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.

Completed surveys for Glacier Country totaled 757.

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

- Bigfork downtown (52)
- National Bison Range (147)
- A Carousel for Missoula (29)
- Conrad Mansion (57)
- Eureka Historical Village (15)
- Glacier National Park (Exxon at west entrance) (152)
- Holland Lake (25)
- Museum of Plains Indians (109)
- Rocky Mountain Elk Foundation (41)
- Ross Creek/Giant Cedars (48)
- Smokejumpers Visitor Center (35)
- St. Mary's Mission (13)
- Whitefish downtown (34)

This random sample represents visitors to Glacier Country who stopped at attractions while visiting the region.



# Chapter 2

## Results

The results from attraction visitors in Glacier 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 Glacier Country**

	All Reasons (N)	All Reasons* (%)	Primary Reason (N)	Primary Reason (%)
Vacation/Pleasure	625	83%	471	69%
Visiting Friends/Relatives	231	31%	138	20%
Passing Through	75	10%	29	4%
Business/ Conference	34	5%	24	4%
Shopping	16	2%	2	<1%
Other	35	5%	21	3%

\*Respondents could answer more than one reason.

Visitors to Glacier Country who spend time at the region's attractions are overwhelmingly in the region for vacation however about one-third are also visiting friends and relatives. A small portion (10%) of those who stopped at attractions were just passing through.

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

Average Nights in Montana		7.5	
Average Nights in Glacier Country		5.26	
		N	%
Percent of respondents using each type of Accommodation*	Hotel/motel/bed & breakfast	309	41%
	Camping, public campground	165	22%
	Home of friend or relative	136	18%
	Camping, private campground	122	16%
	Resort/Condominium	33	4%
	Rented cabin/home	32	4%
	Private cabin/Second home	24	3%
	Guest ranch	14	2%
	Vehicle in parking area	12	2%
	Other	25	3%
<b>Did not spend any nights in Glacier Country</b>		<b>38**</b>	<b>6%</b>

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

\*\*Based on a total N of 631

Visitors who spend time at Glacier Country attractions are spending over five nights in the region and slightly over a week in the state. A small portion (6%) includes day-trippers in the region. While 41 percent will spend at least one night in a motel or bed & breakfast, 38 percent will spend at least one night at a public or private campground.

**Table 3: Attractions Visited in Glacier Country**

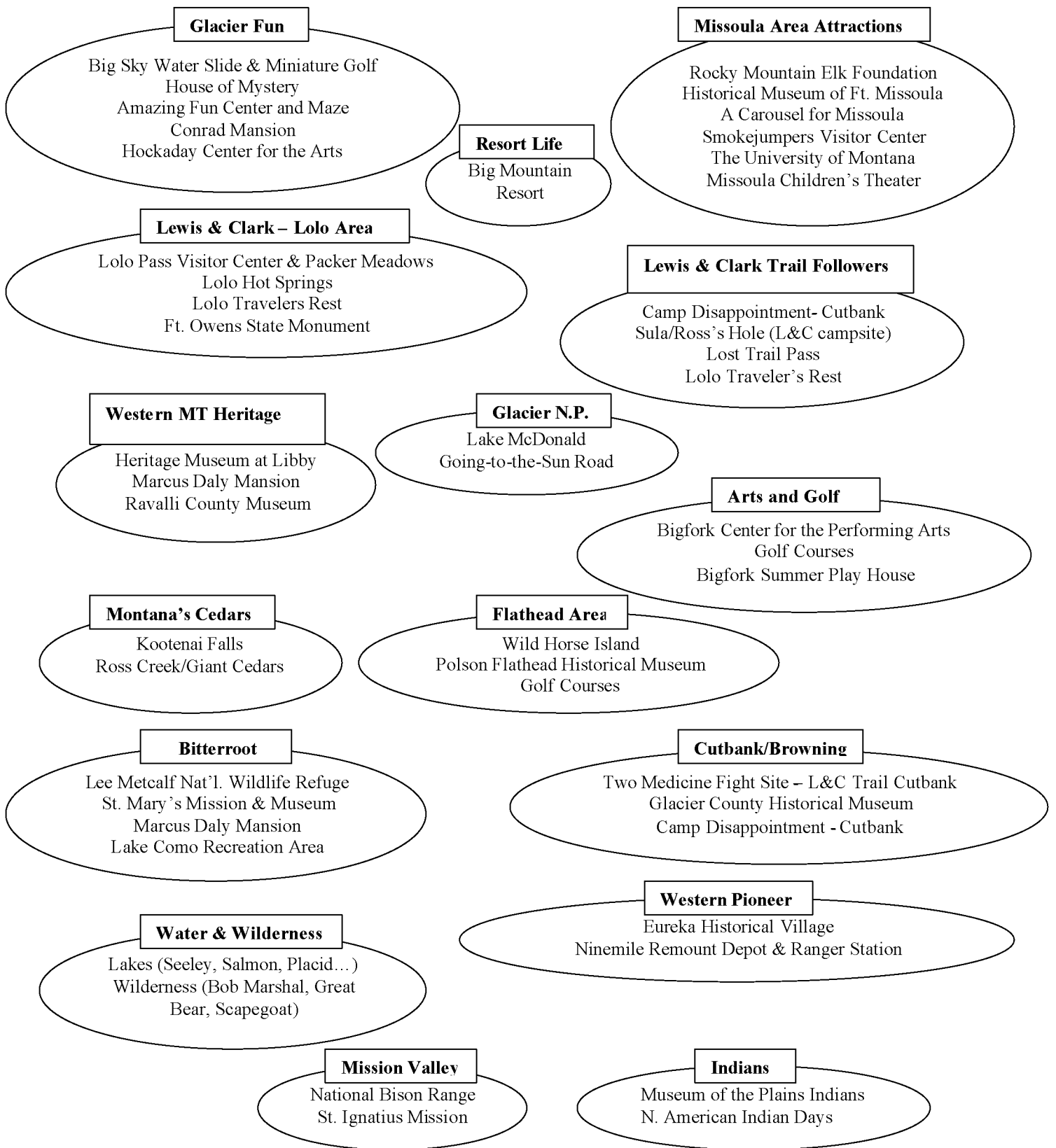
Site*	N	%	Site	N	%
Going-to-the-Sun Road	501	66%	Eureka Historical Village	22	3%
Lake McDonald	395	52%	Two Medicine Fight Site	21	3%
Flathead Lake	313	41%	Wild Horse Island	21	3%
National Bison Range	186	25%	Glacier County Historical Museum	20	3%
Museum of the Plains Indians	153	20%	St. Mary's Mission & Museum	20	3%
Lakes	93	12%	Camp Disappointment	19	3%
Conrad Mansion	81	11%	Lolo Travelers' Rest	19	3%
Rocky Mountain Elk Foundation	79	10%	Polson Flathead Historical Museum	17	2%
St. Ignatius Mission	65	9%	Lee Metcalf NWR	16	2%
A Carousel for Missoula	64	9%	Miracle of America Museum	16	2%
The University of Montana	63	8%	St. Regis Visitor Information Center	16	2%
Ross Creek/Giant Cedars	61	8%	Lost Trail Pass	15	2%
Lolo Pass Visitor Center & Packer Meadows	57	8%	Rocky Mountain Museum of Military History	15	2%
Smokeyjumpers Visitor Center	56	7%	Art Museum of Missoula	11	2%
Big Mountain Resort	47	6%	Ninepipes Museum of Early MT	10	1%
Bigfork Summer Playhouse	41	5%	Fort Owen State Monument	8	1%
Golf Courses	41	5%	Heritage Museum at Libby	8	1%
Lolo Hot Springs	41	5%	Sula/Ross's Hole	8	1%
Kootenai Falls	40	5%	Hockaday Center for the Arts	7	1%
Big Sky Waterslide and Mini Golf	35	5%	Marcus Daly Mansion	7	1%
Wilderness Areas	33	4%	Lake Como Recreation Area	5	1%
Garnet Ghost Town	32	4%	Missoula Children's Theatre	5	1%
Historical Museum at Fort Missoula	30	4%	North American Indian Days	5	1%
Dams	30	4%	Ninemile Remount Depot & Ranger	2	<1%
Amazing Fun Center & Maze	25	3%	Sanders County Historical Museum	2	<1%
Bigfork Center for the Performing Arts	23	3%	Ravalli County Museum	1	<1%
House of Mystery	23	3%	Savenac Nursery	1	<1%

\*Respondents could indicate more than one attraction.

As seen in Table 3, Glacier National Park's Going-to-the-Sun Road (66%) and Lake McDonald (52%) were the two most visited attractions within the region by respondents who stop at attractions. This was followed closely by Flathead Lake where 41 percent of the respondents visited. After the top three attractions, visitation levels dropped dramatically to 19 percent for Museum of the Plains Indians, 16 percent for the National Bison Range and 11 percent for lakes in the region.

Figure 1 shows attractions that grouped together in terms of visitation using factor analysis. 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. 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. In this study, attractions visited by respondents grouped together by geography such as those located in the same community, or by theme (e.g. history, Lewis and Clark, or resort).

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



**Table 4: Information Sources for Visiting Glacier Country**

Source	N	%	Source	N	%
Family or friends	271	36%	Magazine/Newspaper Article	72	10%
Internet	244	32%	Chamber of Commerce/ Visitor Bureau	46	6%
Auto Club (e.g. AAA)	153	20%	Travel Agency	23	3%
MT Travel Planner	128	17%	MT Travel Info Phone Number	18	2%
Guide Book	121	16%	Private Businesses	17	2%
Brochure Rack	115	15%	Billboards	16	2%
None of these sources	104	14%	Regional Travel Info Phone Number	5	1%
Glacier Travel Guide	90	12%			

\*Respondents could indicate more than one information source.

Information sources used by visitors to attractions included the full range of sources, however obtaining information from family and friends topped the list, followed by the Internet (36% and 32% respectively). Interestingly, no one source was predominately used by visitors.

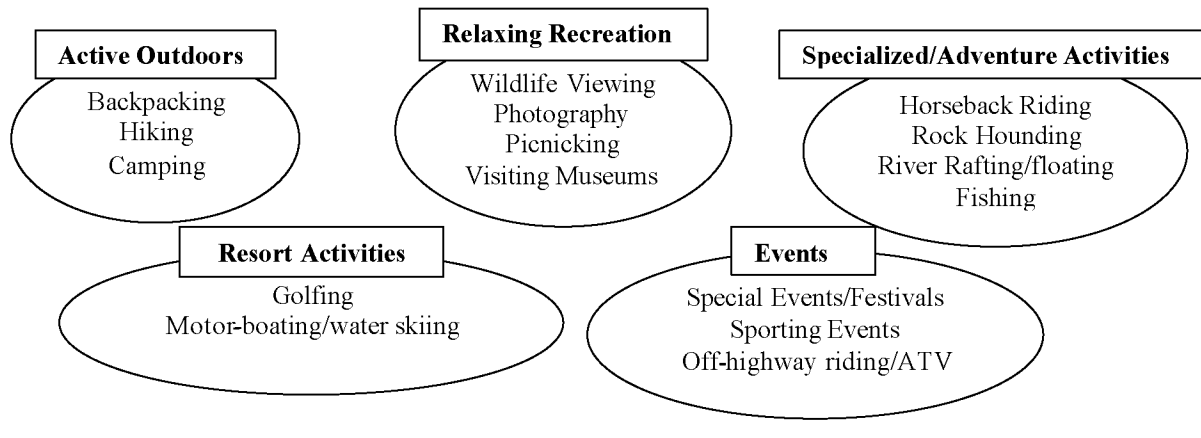
**Table 5: Activities Participated in while in Glacier Country**

Activity*	N	%	Activity	N	%
Photography	400	53%	Backpacking	62	8%
Hiking	396	52%	Special Event/Festival	61	8%
Wildlife Viewing	371	49%	Golfing	59	8%
Shopping	316	42%	Motor-boating/Water-skiing	54	7%
Visiting Museums	265	35%	Canoeing/Kayaking	53	7%
Camping	236	31%	Gambling	45	6%
Picnicking	229	30%	Mountain Biking	32	4%
Fishing/Fly Fishing	148	20%	Rockhounding	28	4%
Other Activity	113	15%	Sporting Event	23	3%
Horseback Riding	87	12%	Off-highway Riding/ATV	15	2%
River Rafting/Floating	84	11%	Sailing/Windsurfing	8	1%
Road/tour Biking	66	9%			

\*Respondents could indicate more than one activity

Table 5 and Figure 2 provide a look at activities that visitors to attractions engaged in while in Glacier Country. The top three activities where nearly 50 percent or more of the visitors engaged in while in the region, were outdoor activities of photography (53%), hiking (52%), and wildlife viewing (49%). When factor analysis was conducted to get a better understanding of the types of activities that group together, it shows that five groupings emerged. 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 type of activities. Interestingly, shopping did not emerge within any factor even though 42 percent of the visitors engaged in this activity. This signifies that shopping is probably an activity done by most people and therefore it did not fit exclusively in any one group.

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



**Table 6: Most likely Place of Residence\***

	<b>N</b>	<b>%</b>
<b>MT County</b>	<b>54</b>	<b>8%</b>
Cascade	11	20%
Gallatin, Lewis & Clark	7	13%
Silver Bow, Yellowstone	6	11%
<b>US State</b>	<b>584</b>	<b>86%</b>
Washington	87	15%
California	65	11%
Oregon	38	7%
Idaho	31	5%
Arizona, Florida	25	4%
<b>Foreign Country</b>	<b>38</b>	<b>6%</b>
Canada: Alberta	11	29%
Canada: British Columbia	6	16%
England/UK/Wales	3	8%

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

People who visited attractions in Glacier Country were most likely to reside outside the state of Montana (86% from other U.S. states plus 6% from foreign countries). Washington and California residents represented the highest proportion of out-of-state visitors while Canada represented most of the foreign visitors.

**Table 7: Characteristics of Visitors to Glacier Country Attractions**

		N	%
<b>Travel Group Type</b>	Family	278	<b>38%</b>
	Couple	213	29%
	Family & Friends	134	18%
	Friends	44	6%
	Self	41	6%
	Organized Group/Club	23	3%
	Business Associates	8	1%
<b>Travel Group Size</b>	Adults: 1	50	7%
	2	448	<b>60%</b>
	3	79	11%
	4+	169	22%
	Children: 0	477	<b>63%</b>
	1	87	12%
	2	105	14%
	3	31	4%
	4+	54	7%
<b>Visited Glacier Country Before?</b>	Yes	408	54%
<b>Visited National Parks on this trip?</b>	Glacier National Park	540	71%
	Yellowstone National Park	181	24%
	Did not visit either park	155	21%
<b>Travel Plan Flexibility</b>	All places were planned in advance	79	11%
	Most places were planned	259	<b>37%</b>
	Planned a few places	236	33%
	No definite plans	131	19%
<b>When Were Plans Made to Visit the Site Where Survey was Completed?</b>	Today	84	11%
	1-7 days ago	109	15%
	1-4 weeks ago	115	15%
	1-6 months ago	273	<b>37%</b>
	Over 6 months ago	163	22%
<b>Fly into MT on Trip?</b>	Yes	169	23%
<b>Flew in to Which City?</b>	Kalispell	73	<b>45%</b>
	Missoula	58	36%
	Great Falls	13	8%
	Bozeman	8	5%
	Billings	6	4%
	Helena	3	2%
	Butte	-	-
	West Yellowstone	-	-
<b>Household Income</b>	Less than \$20K	38	6%
	\$20K - \$39,999	95	16%
	\$40K - \$59,999	130	21%
	\$60K - \$79,999	115	19%
	\$80K - \$99,999	82	14%
	\$100K +	145	<b>24%</b>

While family groups represented the group type with the highest percent, it still represented only 38 percent of the travel group type. In fact, 63 percent of attraction visitors did not travel with children. A substantial 46 percent of the visitors were visiting Glacier Country region for the first time (54% were

repeat visitors). Twenty-three percent flew into Montana (primarily Kalispell and Missoula) for their trip. Household income for those visiting attractions was relatively high with one quarter of the visitors earning over \$100,000. Nearly 60 percent of the visitors had planned to visit the attraction where they were surveyed at least a month in advance.

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. First of all, those who visit attractions in the region are very likely to visit one or both of the national parks (79%).

**Table 8: Park Visitor and Non-park Visitor Characteristics of Those Who Visit Attractions**

		<b>Park Visitor (79%)</b>		<b>Non-park Visitor (21%)</b>	
<b>Length of Stay</b>	Average nights in Montana	8.01		5.46	
	Average nights in Glacier Country	5.63		3.68	
<b>Travel Group</b>	Average number of adults	3.29		2.79	
	Average number of children	1.09		0.87	
		<b>N</b>	<b>%</b>	<b>N</b>	<b>%</b>
	Family	223	38%	55	36%
	Couple	181	31%	32	21%
	Family & Friends	92	16%	42	27%
	Friends	37	6%	7	5%
	Self	31	5%	10	6%
	Organized Group/Club	18	3%	5	3%
	Business Associates	5	<1%	3	2%
<b>Visited Glacier Country Before?</b>	Yes	294	49%	114	74%
<b>Travel Plan Flexibility</b>	All places were planned in advance	57	10%	22	15%
	Most places were planned	227	41%	32	22%
	Planned a few places	181	33%	55	37%
	No definite plans	92	17%	39	26%
<b>When Were Plans Made to Visit the Site where Survey was Completed?</b>	Today	61	10%	23	15%
	1-7 days ago	68	12%	41	27%
	1-4 weeks ago	86	15%	29	19%
	1-6 months ago	233	39%	40	26%
	Over 6 months ago	144	24%	19	13%
<b>Fly on Trip?</b>	Yes	142	24%	27	17%
<b>Household Income</b>	Less than \$20K	29	6%	9	7%
	\$20K - \$39,999	66	14%	29	23%
	\$40K - \$59,999	103	22%	27	21%
	\$60K - \$79,999	95	20%	20	16%
	\$80K - \$99,999	65	14%	17	13%
	\$100K +	120	25%	25	20%

Some differences are seen between park and non-park visitors to Glacier Country attractions. The most striking difference is the length of stay where park visitors stayed almost three nights longer in Montana and two nights longer in Glacier Country. Another substantial difference emerged in repeat visitation. While 74 percent of non-park visitors had been to Glacier Country before, only 49 percent of park visitors had ever been to the region in the past. The park visitor was also more likely to plan their visit in advance (one month or more).

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

Activity*	Park Visitor		Non-park Visitor	
	N	%	N	%
Photography	356	59%	44	28%
Hiking	340	57%	56	36%
Wildlife Viewing	315	52%	56	36%
Shopping	269	45%	47	30%
Visiting Museums	231	38%	34	22%
Camping	205	34%	31	20%
Picnicking	196	33%	33	21%
Fishing/Fly Fishing	118	20%	30	19%
Other Activity	83	14%	30	19%
Horseback Riding	81	14%	6	4%
River Rafting/Floating	74	12%	10	7%
Road/tour Biking	59	10%	7	5%
Backpacking	57	10%	5	3%
Special Events/Festivals	56	9%	5	3%
Golfing	50	8%	9	6%
Motor-boating/Water-skiing	47	8%	7	5%
Canoeing/Kayaking	47	8%	6	4%
Gambling	35	6%	10	7%
Mountain Biking	32	5%	-	-
Rockhounding	25	4%	3	2%
Sporting Event	20	3%	3	2%
Off-highway riding/ATV	13	2%	2	1%
Sailing/Windsurfing	8	1%	-	-

\*Respondents could indicate more than one activity.

Park visitors are more involved in a variety of activities compared to non-park visitors as evidenced by the number of activities that had at least 30 percent of the respondents participate. Seven activities had over 30% participation of the park visitors while only three activities were participated in by 30% or more of the non-park visitors.

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

Source*	Park Visitor		Non-park Visitor	
	N	%	N	%
Internet	222	37%	22	14%
Info from Family and Friends	213	35%	58	37%
Auto Club (e.g. AAA)	138	23%	15	10%
Montana Travel Planner	118	20%	10	7%
Guide Book	101	17%	20	13%
Brochure Rack	100	17%	15	10%
Glacier Country Travel Guide	84	14%	6	4%
Magazine/Newspaper Article	61	10%	11	7%
None of These Sources	60	10%	44	28%
Chamber of Commerce/Visitor Bureau	41	7%	5	3%
Travel Agency	22	4%	1	1%
State Travel Info Number	16	3%	2	1%
Private Businesses	14	2%	3	2%
Billboards	12	2%	4	3%
Regional Travel Info Number	3	1%	2	1%

\*Respondents could indicate more than one information source.



The main difference in information sources used showed that non-park visitors were more likely to NOT use any of the sources and seemed to rely on friends and family for their main source of information over any other source. Only 14 percent of non-park visitors used the Internet for information compared to 37 percent of park visitors who used the Internet for information.

# Chapter 3

## *Summary and Discussion*

### Summary

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

#### **Trip Characteristics**

The primary reason for attraction visitors to travel to Glacier Country was vacation (69%) with visiting friends and relatives being the next most popular reason for visiting (20%). Glacier Country visitors stayed an average of 7.5 nights in the state and 5.26 nights in the region. Forty-one percent of respondents spent at least one night in a motel, 22 percent spent at least one night camping in a public campground, 16 percent camped at least one night in a private campground, 18 percent spent at least one night at the home of a friend or relative, and 13 percent spent at least one night at a resort, rented cabin/condo, guest ranch or second home.

Twenty-three percent of visitors to Glacier Country flew on their trip. Of those who flew, most arrived at the Kalispell airport (45%) and the Missoula airport (36%). Visitors predominantly indicated that they had planned most of the places they would visit on their trip (37%) and their plans to visit the site where they were intercepted were made one to six months before their trip (37%). The information sources most used were family and friends (36%), the Internet (32%), and an auto club (20%).

#### **Visitor Behavior**

In Glacier Country, photography was the activity participated in the most (53%). Hiking was the next most popular activity engaged in (52%) with wildlife viewing (49%) also quite prevalent. Shopping is included as one of the top four activities (42%) of Glacier Country attraction visitors.

Glacier sites such as the Going-to-the-Sun Road and Lake McDonald were the most visited sites in Glacier Country (66% and 52% respectively). Other popular attractions included Flathead Lake (41%), the Museum of the Plains Indians (19%) and the National Bison Range (16%).

#### **Visitor Characteristics**

Visitors to Glacier Country attractions were primarily families (38%) and couples (29%). A little over half of the visitors to Glacier Country had visited the region before (54%). While in Montana, many visitors to Glacier Country visited a national park with most going to Glacier National Park (71%) and others going to Yellowstone National Park (24%) or both parks.

Most visitors to Glacier Country attractions were non-residents visiting from a different state (86%). The most represented states were Washington state (15%) and California (11%). Resident visitors accounted for eight percent of visitors, while visitors from foreign countries accounted for six percent with most traveling from Canada.

Glacier Country visitors were most likely to earn \$100K+ (24%) or \$40K to \$60K (21%).

### **Park and Non-park Visitor Comparison**

Glacier Country attraction visitors who visited a National Park stayed an average of 8.01 nights in Montana and 5.63 nights in Glacier Country. Those visitors who did not visit a National Park stayed an average of 5.46 nights in Montana and 3.68 nights in Glacier Country. Seventy-four percent of non-park visitors had visited Glacier Country before whereas only 49 percent of park visitors were repeat visitors. More park visitors flew on their trip (24%) than non-park visitors (17%).

Hiking and wildlife viewing were popular activities with both park visitors and non-park visitors (57% and 52% respectively for park visitors; 36% each for non-park visitors). Photography, however, was the top activity participated in for park visitors (59%). Most places visited by park visitors were planned (41%) whereas non-park visitors had planned a few places (37%). Non-park visitors planned their visit to the site in which they were surveyed one to seven days prior to their visit (27%) whereas park visitors made their plans one to six months prior (39%).

Park visitors got most of their trip information from the Internet (37%) and from friends and family (35%). Non-park visitors received information from friends and family (37%) and sources not listed as options or no sources (28%).

Park visitors earned higher household incomes than non-park visitors. Fifty-nine percent of park visitors earned \$60K or more whereas 49 percent of non-park visitors made as much. Thirty percent of non-park visitors earned less than \$40K whereas 20 percent of park visitors earned an equivalent amount.

## **Discussion and Marketing Recommendations**

Possibly the most telling statistic from this study is the fact that visitors who go to attractions in the region are more likely than not to visit Glacier National Park. The park was visited by 71 percent of all attraction visitors to the region. Additionally, Glacier Park visitors stayed longer (2 more nights) in the region and the state than those who did not visit the park. From a strategic marketing point of view, Glacier National Park is the ticket to longer stays, which in turn produces a larger economic impact to both the state and the region. With this in mind, it is important that Glacier Country attractions consistently work with the park and the concessionaire in terms of marketing promotions. Joint ventures related to enticing visitors to Glacier National Park should be undertaken.

In terms of travel patterns related to attractions visited, interesting results emerged from the factor analysis. Visitors to attractions can be categorized as visitors who stay within a certain geographic area or those who visit similar attractions. There are "pockets" of attractions in somewhat close proximity of one another that grouped well together including, Missoula area, Bitterroot, Cutbank/Browning, Lolo, Mission Valley, extreme western Montana (Ross Creek area), and Glacier National Park. In addition, there were factors that emerged based on the theme of the attractions including, people who go to resorts, Lewis & Clark Trail

visitors, golf and arts, and Montana heritage. These 16 factors suggest marketing avenues for the attractions.

One simple but effective way to encourage and perhaps increase visitation at the region attractions is for the attraction 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 a day longer. On the other side, those visitors who are less flexible with their plans, will hear about other things to "see and do" in the region which gives them a reason to return.

Activities that visitors participated in provide another outlet for marketing strategies. For visitors at attractions in Glacier Country five factors emerged for the types of activities visitors engaged in while in the region. Five promotional themes can be successfully utilized based on the factor analysis of activities. These themes are:

1. "Active outdoors" which included hiking, camping and backpacking. Promotional themes around these types of activities will most certainly entice that type of visitor.
2. "Relaxing Recreation" should feature scenes of wildlife viewing, photography, picnicking, and museums.
3. "Specialized/Adventure recreation" includes horseback riding, rock hounding, river rafting/floating, and fishing.
4. "Resort Activities" should include scenes of golf and boating as well as water-skiing.
5. "Events" should include promotions related to both sports events and activities such as festivals.

Since most visitors to attractions in Glacier Country do not have children along with them on the trip (63%), it is recommended that promotions generally show young adults together or middle-age to older adults together in the promotions.

All forms of promotional mediums were used to some degree by visitors to Glacier Country attractions. Family and friends provided the greatest number of visitors with their information followed by the Internet. The Internet, however, still provided information to 37 percent of the visitors. Auto clubs, like AAA, and the Montana Travel Planner were used by 23 percent and 20 percent respectively. While no *one* form of promotion dominated the visitors' use, it is still important to provide a range of promotions from being recognized by AAA, to spreading brochures around the region and the state. These types of activities need to continue or even be increased.

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

# Appendix

## A

---

### Survey



# 2002 SUMMER TRAVEL STUDY

## GLACIER COUNTRY TRAVEL REGION, MONTANA

**NOTE: This survey pertains only to the Glacier 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 Glacier Country region of Montana? (Please fill in circles for all that apply.)
- |   |   |   |
|---|---|---|
| <input type="checkbox"/> ① Vacation/recreation/pleasure | <input type="checkbox"/> ③ Just passing through | <input type="checkbox"/> ⑤ Visiting friends, relatives/family event |
| <input type="checkbox"/> ② Business/conference          | <input type="checkbox"/> ④ Shopping             | <input type="checkbox"/> ⑥ Other                                    |

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

- ①       ②       ③       ④       ⑤       ⑥

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

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

**Glacier National Park Area**

- Going-to-the-Sun Road
- Lake McDonald
- Big Sky Waterslide and Miniature Golf (Columbia Falls)
- House of Mystery (Columbia Falls)
- Amazing Fun Center & Maze (West Glacier)

**Blackfeet Territory**

- Museum of the Plains Indians
- North American Indian Days
- Two Medicine Fight Site—Lewis & Clark Trail (Cutbank)
- Camp Disappointment—Lewis & Clark Trail (Cutbank)
- Glacier County Historical Museum

**Flathead: Kalispell, Whitefish, Bigfork**

- Flathead Lake
- Conrad Mansion
- Hockaday Center for the Arts
- Bigfork Center for the Performing Arts
- Bigfork Summer Playhouse
- Big Mountain Resort
- Golf Courses
- Wild Horse Island

**Kootenai-Tobacco Valley**

- Heritage Museum at Libby
- Kootenai Falls (continued next column)

**Kootenai-Tobacco Valley, cont.**

- Eureka Historical Village
- Ross Creek/Giant Cedars

**Clark Fork River**

- Savenac Nursery
- St. Regis Visitor Information Center
- Sanders County Historical Museum (Thompson Falls)
- Dams: Thompson Falls Dam, Noxon Rapids Dam & Reservoir, or Cabinet Gorge Dam

**Mission: Polson, St. Ignatius**

- Miracle of America Museum (Polson)
- Poison Flathead Historical Museum
- Ninepipes Museum of Early Montana
- St. Ignatius Mission (Ronan)
- National Bison Range (Moiese)

**Seeley Swan Valley**

- Lakes: Seeley, Salmon, Placid, Swan, Alva, Inez, Lindbergh or Holland
- Wilderness Areas: Bob Marshall, Great Bear or Scapegoat

**Missoula Valley**

- Rocky Mountain Museum of Military History
- Ninemile Remount Depot & Ranger

**Missoula Valley, cont.**

- Art Museum of Missoula
- Rocky Mountain Elk Foundation
- Historical Museum at Fort Missoula
- Smokejumpers Visitor Center
- Garnet Ghost Town
- The University of Montana
- Missoula Children's Theater
- A Carousel for Missoula

**Bitterroot Valley**

- Lolo Pass Visitor Center & Packer Meadows (Lewis & Clark Campsite)
- Lolo Hot Springs (Lewis & Clark Campsite)
- Lolo ("Travelers Rest")
- Sula/Ross's Hole (Lewis & Clark Campsite)
- Lee Metcalf National Wildlife Refuge
- St. Mary's Mission & Museum (Stevensville)
- Fort Owen State Monument (Stevensville)
- Marcus Daly Mansion (Hamilton)
- Ravalli County Museum (Hamilton)
- Lake Como Recreation Area
- Lost Trail Pass

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

(Please fill in circles for all that apply.)

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

6) On this trip, what is the total number of nights that you plan to stay in Montana (away from your home)?

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 Glacier Country?

(Please refer to map on clipboard if you are unsure which locations fall within Glacier Country.)

Total number of nights in Glacier Country: \_\_\_\_\_ (If you are spending NO nights in Glacier 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 Glacier 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 Glacier 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 Glacier 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  | ⑥ Family & friends    | ⑦ Organized group/club |
| ② Couple | ④ Friends | ⑤ 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   | ③ \$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    |