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Attraction Visitors in Yellowstone Country Travel Region

Norma P. Nickerson

The University of Montana-Missoula

Bethany Sutton

The University of Montana-Missoula

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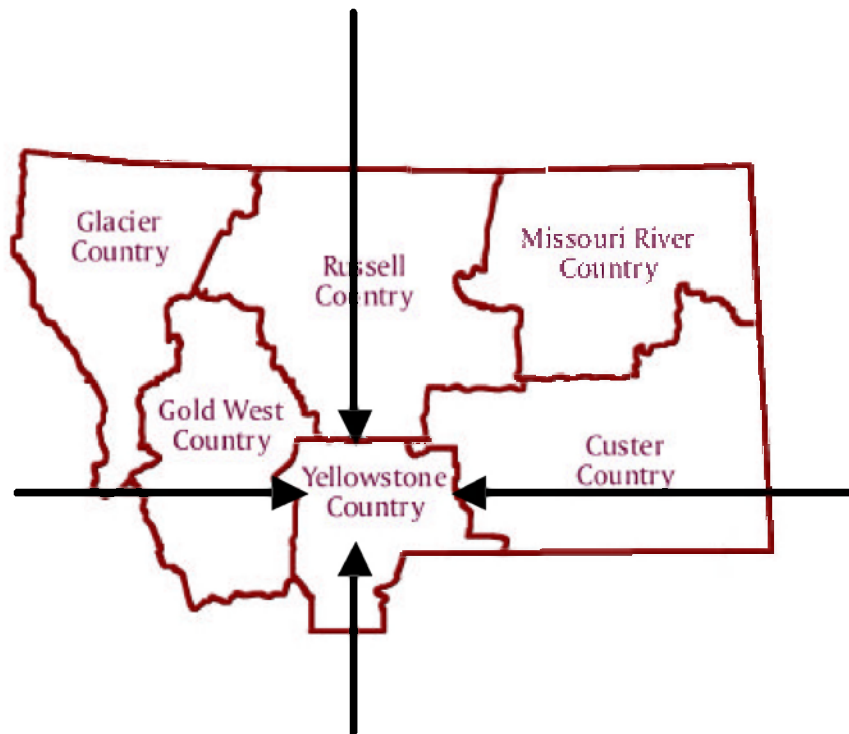
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Attraction Visitors in Yellowstone Country Travel Region



Research Report 2003-5
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

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

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Institute for Tourism & Recreation Research
School of Forestry
The University of Montana
Missoula, MT 59812
www.forestry.umt.edu/itrr

This study was funded by the Lodging Facility Use Tax

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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 Yellowstone Country surveyor, Lindi Kopecko, 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 Yellowstone Country Travel Region

Visitors to Yellowstone Country were intercepted at area attractions from June 15 through August 15, 2002. A total of 367 surveys were completed.

- The most common primary purpose for visiting Yellowstone Country was vacation (73%) followed by visiting friends and relatives (13%).
- Yellowstone Country visitors to attractions stayed an average of 6.45 nights in Montana and 4.5 nights in the region, however 18% did not spend any nights in the region.
- The most common sources of information used were the Internet (41%) followed by family or friends (32%), an auto club (22%) and brochure racks (20%).
- Most Yellowstone Country visitors were from out of the state (87%), primarily from California (15%). Nine percent were Montana residents and four percent were from another country.
- Families were the most common travel group type (48%) followed by 31% who came as couples.
- Nearly half of Yellowstone Country visitors were traveling with children (49%).
- Sixty-two percent of Yellowstone Country visitors had been to the region before.
- Seventy-four percent of Yellowstone Country visitors visited Yellowstone National Park. Sixteen percent visited Glacier and nineteen percent did not visit either park.
- Yellowstone Country attraction visitors were divided nearly equally with their travel plan flexibility with about 50% with most or all places planned in advance and the other 50% with only a few planned stops or no definite plans at all. Sixty-eight percent planned their visit to that site at least one month in advance.
- Twenty-one percent of Yellowstone Country visitors flew on their trip with most arriving in Bozeman (63%).
- Those visitors who visited a National Park stayed an average of 6.41 nights in Montana and 4.54 nights in Yellowstone Country. Non-park visitors stayed an average of 6.67 nights in Montana and 4.35 nights in Yellowstone Country.
- Park visitors were primarily families (50%) while non-park visitors were primarily couples (41%).
- More non-park visitors had visited Yellowstone Country before (84%) than park visitors (57%).
- Park visitors used the Internet (45%) as their source for information. Non-park visitors mainly used information from family and friends (40%).
- Visitors who stopped at more than one attraction generally chose attractions geographically close to one another. The one exception was the outdoor recreation areas which grouped together as like attractions indicating that an outdoor experience in more than one place is appealing to visitors.
- Activity patterns of Yellowstone Country attraction visitors fell into four main groupings: 1) "Active outdoors" which included hiking, backpacking, wildlife viewing, photography, picnicking, river rafting/floating, and horseback riding; 2) "Relaxing recreation" which included visiting museums, photography, and shopping; 3) "Developed outdoor recreation" which included camping and road/tour biking, and; 4) "Sports" which included golf, rockhounding and sporting events. One activity that did not group with other activities but had many participants was fishing.

Chapter 1

Attraction Visitors in Yellowstone Country Travel Region

Introduction

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



Methodology

Travelers to Yellowstone Country Travel Region visiting attractions were intercepted during the summer of 2002 at area attractions. Both residents of Montana who reside outside of Yellowstone 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 (front and back) survey instrument (Appendix A) per group about their travels and about themselves. The 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 Yellowstone Country totaled 367.

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

- Big Sky Resort (22)
- Grizzly Discovery Center (88)
- International Fly Fishing Federation (27)
- Missouri Headwaters State Park (52)
- Museum of the Rockies (88)
- Peaks to Plains Museum (13)
- Carbon County Arts Guild and Depot Gallery (13)
- Wild West Raft Company (35)
- Yellowstone IMAX (29)

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

Chapter 2

Results

The results from attraction visitors in Yellowstone 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 Yellowstone Country

	All Reasons (N)	All Reasons* (%)	Primary Reason (N)	Primary Reason (%)
Vacation/Pleasure	314	86%	246	73%
Visiting Friends/Relatives	101	28%	43	13%
Passing Through	30	8%	14	4%
Business/Conference	28	8%	17	5%
Shopping	8	2%	-	-
Other	30	8%	15	5%

*Respondents could answer more than one reason

Visitors to Yellowstone Country who spend some time at the region's attractions are overwhelmingly in the region for vacation (86%). This is followed by 28 percent of the visitors combining a visit to friends and relatives with vacation. Very few people who are passing through are spending any time at attractions in the region.

Table 2: Accommodations and Length of Stay

Average Nights in Montana		6.45	
Average Nights in Yellowstone Country		4.5	
		N	%
Percent of respondents using each type of accommodation*	Hotel/motel/bed & breakfast	136	37%
	Camping, public campground	49	13%
	Camping, private campground	45	12%
	Home of friend or relative	40	11%
	Resort/Condominium	19	5%
	Rented cabin/home	14	4%
	Guest ranch	10	3%
	Private cabin/Second home	7	2%
	Vehicle in parking area	4	1%
	Other	3	1%
Did not spend any nights in Yellowstone Country		57	18%

*Respondents could stay at more than one accommodation type.

Visitors who spend time at Yellowstone Country attractions are spending 4.5 nights in the region. However, a significant portion (18%) is not spending any nights in the region. Thirty-seven percent of the visitors will spend at least one night in a hotel/motel/bed & breakfast, 13 percent will spend at least one night in a public campground and 12 percent will spend at least one night in a private campground.

Table 3: Attractions Visited in Yellowstone Country*

Site**	N	%	Site	N	%
Grizzly Discovery Center	134	37%	Yellowstone Gateway Museum	15	4%
Museum of the Rockies	128	35%	Gallatin Pioneer Museum	14	4%
IMAX Theatre	78	21%	Beartooth Nature Center	13	4%
Big Sky Resort	61	17%	Mesa Falls	13	4%
Missouri Headwaters State Park	58	16%	Golf Courses	11	3%
Beartooth Scenic Byway	53	14%	Headwaters Heritage Museum	9	3%
Historic Downtown Livingston	52	14%	Historic Railroad Depot	8	2%
Museum of the Yellowstone	45	12%	Red Rock Wildlife Refuge	8	2%
Madison River Earthquake Area - Quake Lake	40	11%	Big Timber Waterslide	7	2%
International Fly Fishing Museum	36	10%	Harriman Park	7	2%
Montana State University	36	10%	American Computer Museum	6	2%
Custer National Forest	34	9%	Natural Bridge State Park	6	2%
Hebgen Lake Recreation Area	32	9%	Greycliff Prairie Dog Town State Park	5	1%
Chico Hot Springs	27	7%	Natural History Exhibit Hall	4	1%
Absaroka-Beartooth Wilderness	25	7%	Park County Historical Museum	4	1%
Roosevelt Arch	24	7%	Three Forks Railroad	4	1%
Sacajawea Park	24	7%	Emerson Cultural Center	3	1%
Federation of Fly Fishers Education Center	24	7%	Gold Mine	3	1%
Bozeman Hot Springs	22	6%	Itch-Kep-Pe Park	3	1%
Livingston Depot Center	21	6%	Rare Earth	3	1%
Big Horn Canyon	20	5%	Half Moon Park	1	<1%
Carbon County Art Guild/Depot Gallery	18	5%	Museum of the Beartooths	1	<1%
Madison Buffalo Jump State Monument	18	5%	Shining Mountain Gallery	1	<1%
Peaks to Plains Museum	17	5%			

* Belgrade Stock Car Races, Crazy Mountain Museum, & Hailstone National Wildlife Refuge were not visited by respondents of the survey.

** Respondents could indicate more than one attraction.

As seen in Table 3, the Museum of the Rockies and the Grizzly Discovery Center were the two most visited attractions within the region by respondents who stopped at attractions. Interestingly, when looking at the factor analysis of visitation at attractions, patterns emerge (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. For this analysis, a varimax rotation was used and only factors with an Eigen value greater than one were selected. Only variables with loadings of .40 or greater were included in the factor. In this study, attractions visited by respondents either grouped together by geography, such as those located in the same community, or by theme such as history or outdoor recreation.

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

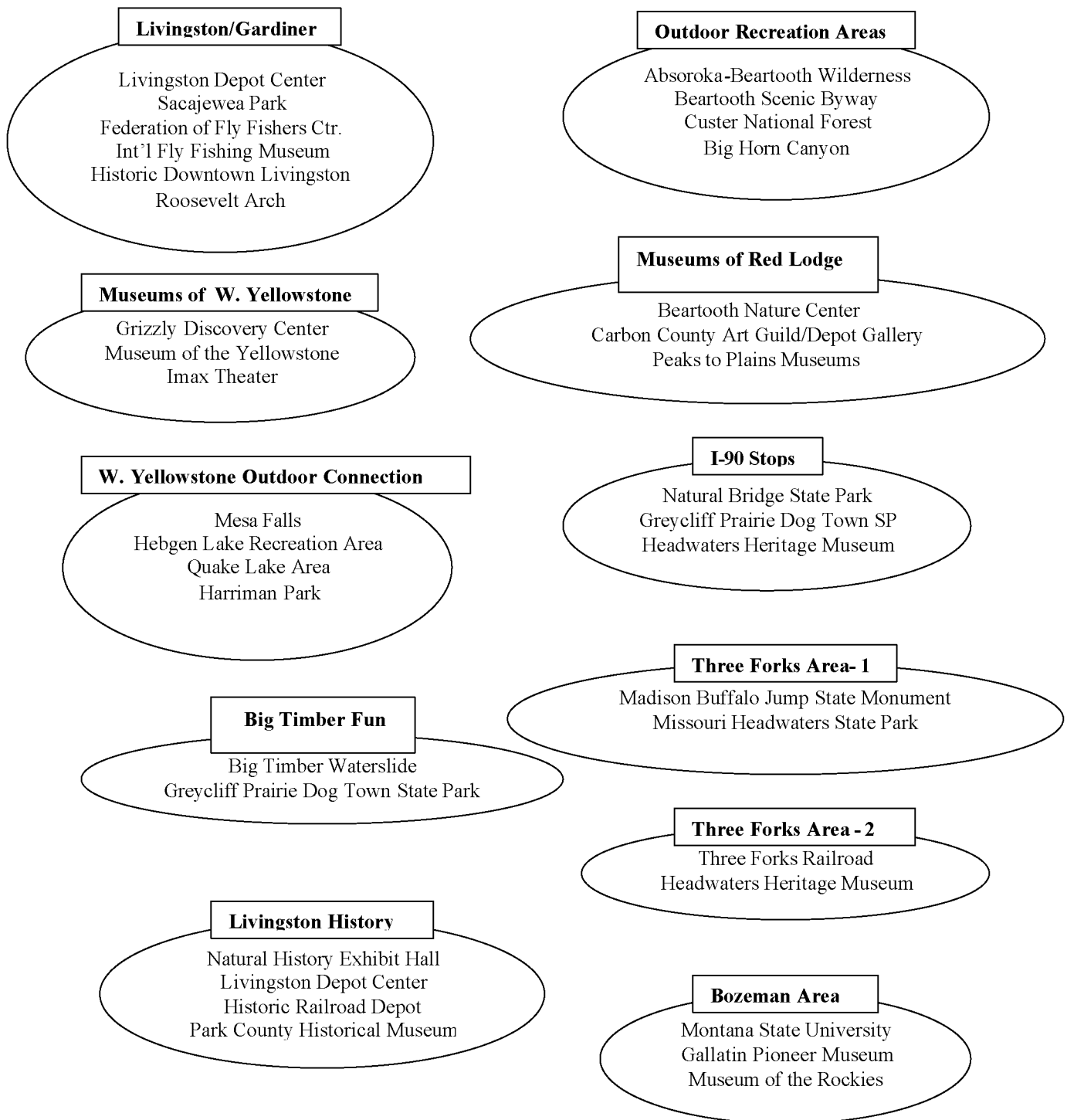


Table 4: Information Sources Used Before and During Trip

Source*	N	%	Source	N	%
Internet	151	41%	Magazine/Newspaper Article	33	9%
Family or friends	119	32%	None of these sources	31	8%
Auto Club (e.g. AAA)	79	22%	Private Businesses	16	4%
Brochure Rack	74	20%	Billboards	14	4%
Guide Book	66	18%	MT Travel Info Phone Number	10	3%
Yellowstone Travel Guide	61	17%	Regional Travel Info Phone Number	6	2%
MT Travel Planner	50	14%	Travel Agency	3	1%
Chamber of Commerce/ Visitor Bureau	44	12%			

*Respondents could indicate more than one information source.

Information sources used by visitors to attractions span the full range of sources with the Internet coming out on top for the majority of visitors. Interestingly, more Yellowstone Country attraction visitors got their information from the Internet than from family or friends.

Table 5: Activities Participated in while in Yellowstone Country

Activity*	N	%	Activity	N	%
Visiting Museums	210	57%	Backpacking	24	7%
Wildlife Viewing	204	56%	Mountain Biking	17	5%
Photography	200	55%	Gambling	15	4%
Shopping	187	51%	Canoeing/Kayaking	13	4%
Hiking	168	46%	Golfing	13	4%
Picnicking	126	34%	Road/Tour Biking	13	4%
Fishing/Fly Fishing	108	29%	Sporting Event	13	4%
Camping	100	27%	Off-highway Riding/ATV	10	3%
River Rafting/Floating	87	24%	Rockhounding	8	2%
Horseback Riding	53	14%	Motor-boating/Water-skiing	4	1%
Other Activity	36	10%	Sailing/Windsurfing	1	<1%
Special Event/Festival	31	9%			

*Respondents could indicate more than one activity.

Figure 2: Activity Patterns – Results of Factor Analysis

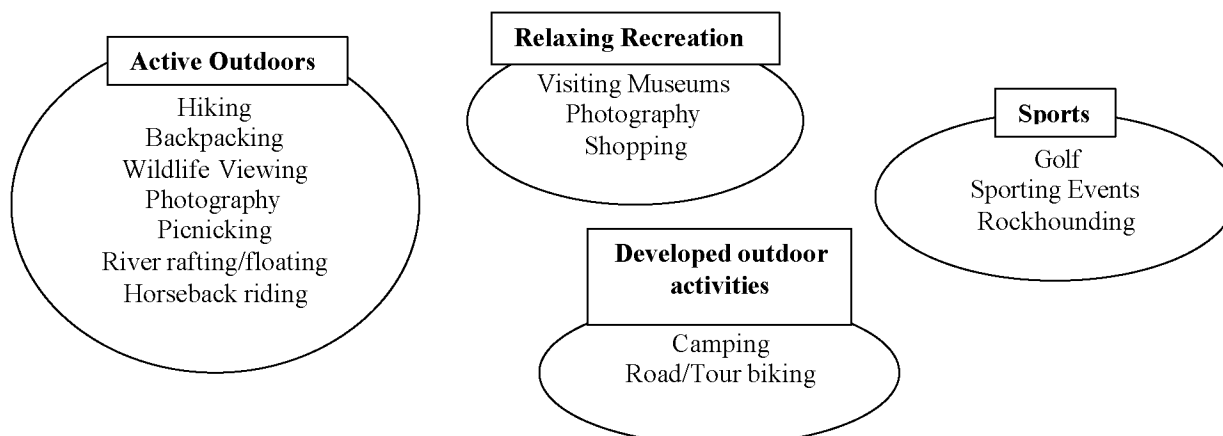


Table 5 and Figure 2 provide a look at activities that visitors to attractions engaged in while in Yellowstone Country. Over 50 percent of visitors visited museums, watched wildlife, engaged in photography, and went shopping according to results in Table 5. When factor analysis was conducted to get a better understanding of the types of activities that group together, it showed that four groupings emerged. One group of activities was labeled “active outdoors” as it included only outdoor recreation. Another group labeled “relaxing recreation” included photography, visiting museums, and shopping. While four factors emerged in this analysis, it also indicates that activities such as fishing (engaged in by 29 percent of visitors), did not group together with any other activity. This signifies that fishing is engaged in either as a solitary activity or an activity done by most people and therefore it did not fit exclusively in any one factor.

Table 6: Most likely Place of Residence

	N	%
Montana Residents	31	9%
Out-of State Residents	294	87%
Foreign Country Residents	13	4%
	338	100%
MT Counties*		
Missoula	5	23%
Cascade	4	18%
Yellowstone	3	14%
US State*		
California	44	15%
Texas, Wisconsin	15	5%
Oregon	14	5%
Foreign Country*		
England/UK/Wales	4	31%

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

People who visited attractions in Yellowstone Country were most likely to be from out-of-state or a foreign country (91%). These nonresidents represented California, Texas, Wisconsin, and Oregon at higher proportions than other nonresidents. Nine percent of attraction visitors, however, were from other regions of Montana. These in-state visitors generally came from three of the higher populated counties in Montana.

Table 7: Characteristics of Visitors to Yellowstone Country Attractions

		N	%
Travel Group Type	Family	170	48%
	Couple	110	31%
	Family & Friends	40	11%
	Self	17	5%
	Friends	9	3%
	Organized Group/Club	7	2%
	Business Associates	4	1%
Travel Group Size	Adults: 1	27	7%
	2	230	63%
	3	31	8%
	4+	77	21%
	Children: 0	187	51%
	1	47	13%
	2	65	18%
	3	32	9%
	4+	36	10%
Visited Yellowstone Country Before?	Yes	224	62%
Visited National Parks?	Yellowstone National Park	273	74%
	Glacier National Park	58	16%
	Did not visit either park	70	19%
Travel Plan Flexibility	All places were planned in advance	38	11%
	Most places were planned	139	40%
	Planned a few places	121	35%
	No definite plans	51	15%
When were plans made to visit the site where survey was completed?	Today	27	8%
	1-7 days ago	41	11%
	1-4 weeks ago	48	13%
	1-6 months ago	165	46%
	Over 6 months ago	80	22%
Fly into MT for this Trip?	Yes	75	21%
Flew in to Which City?	Bozeman	45	63%
	Billings	13	18%
	Missoula	4	6%
	Great Falls	3	4%
	West Yellowstone	3	4%
	Butte	2	3%
	Helena	2	3%
	Kalispell	-	-
Household Income	Less than \$20K	9	3%
	\$20K - \$39,999	33	11%
	\$40K - \$59,999	56	18%
	\$60K - \$79,999	80	26%
	\$80K - \$99,999	38	13%
	\$100K +	88	29%

Visitors to Yellowstone Country Region generally arrived either as a family or a couple. Families were more likely to have one or two children with them on this trip. Thirty-eight percent were visiting the region for the first time and 21 percent flew into Montana – usually Bozeman. Seventy-four percent visited

Yellowstone National Park but only 16 percent visited Glacier National Park. Visitors to attractions in Yellowstone Country had incomes greater than \$60,000 (68%). Finally, in most cases visitors planned their visit to the attraction 1-6 months prior to their trip, although 18 percent decided within a week to visit that attraction.

The following section provides a comparison of visitors who visited either Glacier National Park or Yellowstone National Park to those who did not visit either park.

Table 8: Park and Non-park Visitor: Comparison of Characteristics

		Park Visitor (81%)		Non-park Visitor (19%)	
		N	%	N	%
Length of Stay	Average nights in Montana	6.41		6.67	
	Average nights in Yellowstone Country	4.54		4.35	
Travel Group	Average number of adults	3.24		2.99	
	Average number of children	1.58		1.14	
		N	%	N	%
	Family	146	50%	24	36%
	Couple	83	29%	27	41%
	Family & Friends	33	11%	7	11%
	Self	12	4%	5	8%
	Friends	8	3%	1	2%
	Organized Group/Club	5	2%	2	3%
	Business Associates	4	1%	-	-
Visited Yellowstone Country Before?	Yes	166	57%	58	84%
Travel Plan Flexibility	All places were planned in advance	25	9%	13	19%
	Most places were planned	120	43%	19	28%
	Planned a few places	105	38%	16	23%
	No definite plans	30	11%	21	30%
When were plans made to visit the site where survey was completed?	Today	17	6%	10	14%
	1-7 days ago	25	9%	16	23%
	1-4 weeks ago	34	12%	14	20%
	1-6 months ago	147	51%	18	26%
	Over 6 months ago	68	23%	12	17%
Fly on Trip?	Yes	63	21%	12	17%
Household Income	Less than \$20K	6	2%	3	5%
	\$20K - \$39,999	30	12%	3	5%
	\$40K - \$59,999	42	17%	14	25%
	\$60K - \$79,999	65	26%	15	27%
	\$80K - \$99,999	33	13%	5	9%
	\$100K +	72	29%	16	29%

Some differences are seen between park and non-park visitors to Yellowstone Country attractions. Non-park visitors had been to the region in the past (84%) significantly more than park visitors (57%). Non-park visitors were more likely to have flexibility in their travel plans than park visitors, and the non-park visitor had a much lower percentage of families than park visitors.

Table 9: Park and Non-park Visitor: Activity Comparisons

Activity*	Park Visitor		Non-park Visitor	
	N	%	N	%
Wildlife Viewing	182	61%	22	31%
Photography	173	58%	27	39%
Visiting Museums	168	57%	42	60%
Shopping	164	55%	23	33%
Hiking	149	50%	19	27%
Picnicking	107	36%	19	27%
Camping	89	30%	11	16%
Fishing/Fly Fishing	86	29%	22	31%
River Rafting/Floating	79	27%	8	11%
Horseback Riding	51	17%	2	3%
Special Events/Festivals	31	10%	3	4%
Other Activity	26	9%	10	14%
Backpacking	23	8%	1	1%
Mountain Biking	14	5%	3	4%
Gambling	12	4%	3	4%
Road/tour Biking	12	4%	1	1%
Sporting Event	11	4%	2	3%
Canoeing/Kayaking	10	3%	3	4%
Golfing	10	3%	3	4%
Off-highway riding/ATV	8	3%	2	3%
Rockhounding	8	3%	-	-
Motor-boating/Water-skiing	4	1%	-	-
Sailing/Windsurfing	1	<1%	-	-

*Respondents could indicate more than one activity.

Park Visitors are more involved in a variety of activities compared to the non-park visitors as evidenced by the number of activities (five) that had more than 50 percent of visitors participate compared to only one activity that received over 50 percent participation of the non-park group.

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

Source*	Park Visitor		Non-park Visitor	
	N	%	N	%
Internet	133	45%	18	26%
Info from Family and Friends	91	31%	28	40%
Brochure Rack	65	22%	9	13%
Auto Club (e.g. AAA)	64	22%	15	21%
Yellowstone Country Travel Guide	59	20%	2	3%
Guide Book	53	18%	13	19%
Montana Travel Planner	44	15%	6	9%
Chamber of Commerce/Visitor Bureau	37	13%	7	10%
Magazine/Newspaper Article	25	8%	8	11%
None of These Sources	20	7%	11	16%
Private Businesses	13	4%	3	4%
Billboards	12	4%	2	3%
State Travel Info Number	8	3%	2	3%
Regional Travel Info Number	6	2%	-	-
Travel Agency	3	1%	-	-

*Respondents could indicate more than one information source.

Interestingly, non-park visitors used information from family and friends more than the park visitor who used the Internet in higher proportions. Also, the park visitor appears to use more information sources than the non-park visitor. This is probably explained by the large number of repeat non-park visitors who may not need additional information for their trip.

Chapter 3

Summary and Discussion

Summary

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

Trip Characteristics

The primary reason for visitors to travel to Yellowstone Country was vacation (73%) with visiting friends and relatives being the next most popular reason for visiting (13%). Visitors to Yellowstone Country stayed an average of 6.45 nights in Montana and 4.5 nights in the region. Eighteen percent did not spend the night in Yellowstone Country. Most visitors to Yellowstone Country attractions spent at least one night in a hotel, motel, or bed and breakfast (37%), while 3 percent spent at least one night in a public campground and 12 percent camped at least one night in a private campground. Eleven percent spent at least one night at the home of a friend or relative.

Twenty-one percent of visitors to Yellowstone Country attractions flew on their trip. Of those who flew, most arrived at the Bozeman airport (63%). Visitors predominantly indicated that they had planned most of the places they would visit on their trip (40%) and their plans were made one to six months before their trip (46%). The information sources most used were the Internet (41%), family and friends (32%), an auto club (22%) and brochure racks (20%).

Visitor Behavior

In Yellowstone Country, visiting museums was the activity participated in the most (57%). Wildlife viewing (56%) and photography (55%) were the next most popular activities engaged in. More than half of Yellowstone Country visitors shopped (51%).

The most visited attraction in Yellowstone Country was the Museum of the Rockies (35%). Other popular attractions included the Grizzly Discovery Center (32%), IMAX (20%) and Big Sky Resort (16%).

Visitor Characteristics

Visitors to Yellowstone Country attractions were primarily families (48%) and couples (31%). Over half of the visitors had been to the region before (62%). While in Montana, most visitors to Yellowstone Country attractions visited a national park with seventy-four percent visiting Yellowstone National Park and sixteen percent visiting Glacier National Park.

Most visitors to Yellowstone Country attractions were non-residents visiting from a different state (87%). The most represented state was California (15%). Resident visitors accounted for nine percent of visitors. Visitors from foreign countries accounted for four percent of Yellowstone Country visitors with most traveling from England/UK/Wales.

Attraction visitors in Yellowstone Country were most likely to earn \$100K or more (29%) or \$60K to \$80K (26%).

Park and Non-park Visitors

Yellowstone Country attraction visitors who visited a National Park stayed an average of 6.41 nights in Montana and 4.54 nights in Yellowstone Country whereas visitors who did not visit a National Park stayed an average of 6.67 nights in Montana and 4.35 nights in Yellowstone Country. Eighty-four percent of non-park visitors had visited Yellowstone Country before while fifty-seven percent of park visitors had. Visitors to a park were more likely to be a family (50%) than non-park visitors (36%) while non-park visitors were more likely to be a couple (41%) than park visitors (29%).

More park visitors flew on their trip (21%) than non-park visitors (17%). Park visitors had most places planned that they would visit (43%) whereas non-park visitors either had no definite plans (30%) or had most places planned (28%).

Most park and non-park visitors participated in visiting museums (57% and 60% respectively). However, while visiting museums was the only activity a majority of non-park visitors participated in, more than half of park visitors participated in wildlife viewing (61%), photography (58%), shopping (55%) and hiking (50%).

Park visitors sought most of their information from the Internet (45%) while non-park visitors got most of their information from friends and family (40%).

Discussion and Marketing Recommendations

Some findings brought out in this report may be a starting point for marketing strategies. In terms of length of stay, 18 percent did not spend any nights in the region or the state. Perhaps one strategy would be to focus on length of stay. Could these day-trippers be convinced to stay longer? The most likely day-tripper is the Yellowstone National Park visitor who drops into West Yellowstone or Livingston for the day. Would it be possible for Yellowstone Country to get the names of visitors staying in the Park? If so, direct mailings to those who have already made park reservations could encourage longer stays in Montana if the suggestion is made during the planning stages of the trip.

Another interesting finding is the relationship between attraction types. While it makes common 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 attraction employees and volunteers to recommend other nearby museums and attractions 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.

Many times studies provide assurance that marketing strategies are on target. Obviously easily accessible and pleasant looking web pages will do more than any type of promotional

medium. People have learned that the Internet is the quickest way to get information about potential vacation areas and side trips. It is imperative that the promotion of attractions takes two approaches on the web page. As shown with the factor analysis model, visitors either go to attractions geographically close to one another or along a particular route, or they visit areas of like interest such as the outdoor recreation theme. Visitors are more likely to go if it is suggested to them. Therefore, each independent web page of each attraction should have some form of map with suggested similar attractions and directions on how to get to those attractions. In other words, each attraction helps promote their neighbors. This is further proven as a good strategy when looking at the advanced planning most visitors did to visit that site. Sixty-eight percent planned the visit to that site over a month before the trip, indicative of a need to have the attraction out in front of the visitor before the trip begins.

Also, as shown with the activity patterns that emerged (Fig. 2), it makes sense to promote those activities as themes. Active outdoors suggests that one type of visitor will be interested in ideas for hiking, watching wildlife, photography, river rafting/floating, and horseback riding types of activities. Placing these activities and where to do them on the same web page will provide an ease of planning for the visitor and a higher chance that those activities will be engaged in while in Yellowstone Country. The same idea goes for the other themes of "relaxing recreation," "special events," and "sports." Any of these themes, promoted together, will entice and encourage longer visitation. The first place to start with that type of promotion is through cooperative web page design among similar activities and attractions.

While the Internet is a primary and necessary medium for promotion, there were still 22 percent of the visitors who used an auto club such as AAA. It is highly recommended that all attractions within the region work towards AAA endorsement. This provides two methods of promotion. First, AAA travel agents will recommend visitation of these attractions when trip packages are assembled for clients. Second, a AAA symbol on the door or window and in other advertisements places the attraction at a higher level of acceptance by potential visitors. It tells the visitor that someone has "approved" this attraction, thereby reducing the anxiety level toward visiting the unknown.

The last promotional vehicle used by 20 percent of the visitors was a brochure obtained from a brochure rack. Fifty-one percent of visitors had most or all places planned in advance, leaving a full 49 percent who could be persuaded by a brochure. ALL attractions within the region should have some form of brochure to entice the traveling public. Without this visibility, the likelihood of "drop-in" visitors is virtually eliminated.

It is no surprise that 81 percent of all visitors to attractions in the region visited one or both of the national parks (74% visited Yellowstone National Park). Therefore, marketing within the park and co-op marketing with the park concessionaire could provide a big "bang for the buck" to the attractions and the region. The more connections made with the park the better.

In summary, the findings in this report have categorized the visitor in Yellowstone Country Travel Region who visited one or more attractions within the region. By understanding whom 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

YELLOWSTONE COUNTRY TRAVEL REGION, MONTANA

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

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

① ② ③ ④ ⑤ ⑥

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

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

Bozeman Area

- Museum of the Rockies
- Gallatin Pioneer Museum
- American Computer Museum/Compuseum
- Emerson Cultural Center
- Montana State University
- Belgrade Stock Car Races

Columbus/Big Timber Area

- Museum of the Beartooths
- Itch-Kep-Pe Park (on Lewis & Clark Trail)
- Half Moon Park
- Natural Bridge State Park
- Greycliff Prairie Dog Town State Park
- Crazy Mountain Museum
- Hailstone National Wildlife Refuge
- Big Timber Waterslide

Regional Attractions

- Golf Courses

Livingston-Gardiner Area

- Historic Downtown Livingston
- Sacajawea Park
- Federation of Fly Fishers Education Center
- International Fly Fishing Museum
- Natural History Exhibit Hall
- Livingston Depot Center
- Yellowstone Gateway Museum
- Park County Historical Museum
- Chico Hot Springs
- Shining Mountain Gallery (Pray)
- Gold Mine (Jardine)
- Roosevelt Arch (Gardiner)
- Historic Railroad Depot (Gardiner)

Red Lodge Area

- Absaroka-Beartooth Wilderness
- Beartooth Scenic Byway
- Beartooth Nature Center
- Carbon County Art Guild/Depot Gallery
- Peaks to Plains Museum (*continued next column*)

Red Lodge, cont.

- Custer National Forest
- Big Horn Canyon

Three Forks

- Three Forks Railroad
- Madison Buffalo Jump State Monument
- Missouri Headwaters State Park
- Headwaters Heritage Museum

West Yellowstone Area

- Big Sky Resort
- Madison River Earthquake Area—Quake Lake
- Hebgen Lake Recreation Area
- Bozeman Hot Springs
- Mesa Falls
- Harriman Park
- Red Rock Wildlife Refuge
- Grizzly Discovery Center
- Museum of the Yellowstone
- Rare Earth (working sluice)
- IMAX Theater

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

(Please fill in circles for all that apply.)

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

œ Over Please œ

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 Yellowstone Country?
(Please refer to map on clipboard if you are unsure which locations fall within Yellowstone Country.)
Total number of nights in Yellowstone Country: _____ (If you are spending NO nights in Yellowstone 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 Yellowstone Country?

(Please fill in circles for all that apply.)

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

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

- | | | |
|--|---|--|
| <input type="checkbox"/> ① Internet travel information | <input type="checkbox"/> ⑥ Brochure rack | <input type="checkbox"/> ⑪ Information from private businesses |
| <input type="checkbox"/> ② Automobile club (e.g. AAA) | <input type="checkbox"/> ⑦ Billboards | <input type="checkbox"/> ⑫ Information from family or friends |
| <input type="checkbox"/> ③ Guide book (not auto club book) | <input type="checkbox"/> ⑧ State travel information number | <input type="checkbox"/> ⑬ Travel agency |
| <input type="checkbox"/> ④ Montana Travel Planner | <input type="checkbox"/> ⑨ Regional travel information number | <input type="checkbox"/> ⑭ Magazine/newspaper article |
| <input type="checkbox"/> ⑤ Yellowstone Travel Guide | <input type="checkbox"/> ⑩ Chamber of Commerce/Visitor Bureau | <input type="checkbox"/> 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.)

- | | | |
|---|---|--|
| <input type="checkbox"/> ① Today | <input type="checkbox"/> ③ 1-4 weeks ago | <input type="checkbox"/> ⑤ Over 6 months ago |
| <input type="checkbox"/> ② 1-7 days ago | <input type="checkbox"/> 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?

- | | | | | | | | |
|-------------------------------------|------------------------------------|----------------------------------|--|-----------------------------------|-------------------------------------|---|--------------------------------------|
| <input type="checkbox"/> ① Billings | <input type="checkbox"/> ② Bozeman | <input type="checkbox"/> ③ Butte | <input type="checkbox"/> ④ Great Falls | <input type="checkbox"/> ⑤ Helena | <input type="checkbox"/> ⑥ Missoula | <input type="checkbox"/> ⑦ West Yellowstone | <input type="checkbox"/> 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.)

- | | | |
|--|--|---|
| <input type="checkbox"/> ① Glacier National Park | <input type="checkbox"/> ② Yellowstone National Park | <input type="checkbox"/> ③ Neither park |
|--|--|---|

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

- | | | | |
|-----------------------------------|------------------------------------|--|---|
| <input type="checkbox"/> ① Self | <input type="checkbox"/> ③ Family | <input type="checkbox"/> ⑤ Family & friends | <input type="checkbox"/> ⑦ Organized group/club |
| <input type="checkbox"/> ② Couple | <input type="checkbox"/> ④ Friends | <input type="checkbox"/> 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.)

- | | | |
|---|---|---|
| <input type="checkbox"/> ① Less than \$20,000 | <input type="checkbox"/> ③ \$40,000 to \$59,999 | <input type="checkbox"/> ⑤ \$80,000 to \$99,999 |
| <input type="checkbox"/> ② \$20,000 to \$39,999 | <input type="checkbox"/> ④ \$60,000 to \$79,999 | <input type="checkbox"/> ⑥ \$100,000 or more |