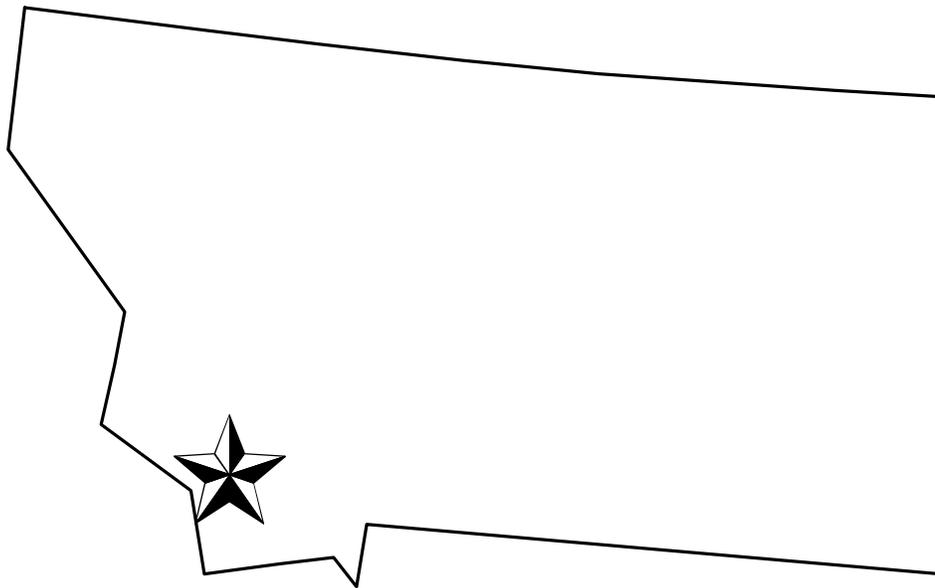


# Beaverhead County Explores Tourism Potential

Beaverhead County, MT

The 1998 Montana Community  
Tourism Assessment Process



Research Report 60  
January 1999

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## The 1998 Montana Community Tourism Assessment Process

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Research Report 60

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## **EXECUTIVE SUMMARY**

### **Introduction**

This report presents information about tourism for Beaverhead County, Montana, including present levels and characteristics of travel, residents' opinions and attitudes about tourism in Montana and in their county along with characteristics for a statewide sample. A mail-back questionnaire was administered to a randomly selected sample of 500 residents of Beaverhead County and to a statewide sample of 1000 Montana residents during October, November, and December, 1998. That initial mailing was followed one week later by a reminder postcard and two weeks after that by a replacement questionnaire to those residents who had not yet responded.

### **Results**

#### **NONRESIDENT VISITORS:**

- In 1998, over 3.8 million travel groups visited Montana. Of those, approximately 500,000 (13%) traveled through Beaverhead County.
- Over \$1.5 billion was spent statewide in 1998 by nonresident travelers. This figure amounts to about \$1,740 for every resident in Montana.
- In Beaverhead County, nonresident visitors spent about \$18.6 million during 1998, or about \$2,072 per Beaverhead County resident.
- Travelers to Beaverhead County tended to stay in Montana longer than statewide visitors.
- While in Montana, visitors to Beaverhead County reported that the best source of travel information was from persons in motels, restaurants, gas stations, etc.
- Over half of visitors to Beaverhead County were in Montana for vacation/recreation/pleasure.
- Primary attractions to Montana for travelers to Beaverhead County were the mountains, rivers, fishing, uncrowded areas, and Glacier National Park.
- Primary recreation activities of Montana visitors to Beaverhead County included watching wildlife, nature photography, and visiting historic & interpretive sites.
- Visitors to Beaverhead County spent most of their money on gas & oil, lodging, and in restaurants/bars.

- Nonresident travel groups who traveled through Beaverhead County and spent at least one night there, spent an average of \$90.00 per day while in Montana and stayed an average of 4 nights in the state.

**RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:**

- Respondents from Beaverhead County were very similar to the statewide sample in age and length of residence in their county and Montana.
- Over half of the county and statewide samples were native Montanans.
- Beaverhead County respondents believe that agriculture/agribusiness, tourism/recreation, and services offer the best potential for economic development for Beaverhead County.
- The majority of Beaverhead County residents do not feel that they are economically dependent on tourists.
- Both Beaverhead County residents and statewide respondents have a strong attachment to their community, and are concerned about the future of their community.
- Beaverhead County residents feel their community is growing but they are split on whether it is growing too fast or growing at about the right rate.
- Beaverhead County residents feel the quality of their community life could be improved by improving job opportunities, highways & roads, and cost of living.
- Beaverhead County residents feel that tourists have a negative impact on traffic congestion, the condition of roads & highways, safety from crime, and cost of living.
- Beaverhead County residents are generally positive about tourism development, but do not feel that they will personally benefit from increased tourism and feel that the quality of their community life will be affected if tourism increases.
- Beaverhead County residents would support regulations to limit tourism development in their community.
- Beaverhead County residents think there is adequate undeveloped open space but are concerned about the potential loss of open space.
- Beaverhead County residents feel strongly that any decisions about tourism development should involve the local residents and not be left entirely to the private sector.
- Overall economic benefit was the primary advantage of increasing tourism in Beaverhead County while overcrowding, wear and tear on roads/infrastructure stress, and abuse of land were seen as leading disadvantages.

**CONCERNS OF BEAVERHEAD COUNTY RESIDENTS:**

- Visiting museums, ghost towns & other historic areas, as well as cross country skiing, hiking and backpacking, wildlife viewing, and camping were identified as tourist activities which represented a good opportunity for promotion in Beaverhead County.
- Residents were less positive about promotion of Beaverhead County for ATV use, hunting, snowmobiling, and fishing.
- Beaverhead County residents are most concerned about the potential adverse impact increased tourism may have on the quality of life, safety, and way of life they now enjoy. There is also a significant concern of the adverse impact to hunting and fishing.
- By far, Beaverhead County residents see the outdoors, natural areas, scenery, open space, and wildlife recreation opportunities as the County's tourism strength.
- Lack of good restaurants, shopping and overnight accommodations are the primary weaknesses of Beaverhead County in terms of increasing tourism.
- Community appearance and distance from major cities was also cited as a weakness.

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## INTRODUCTION

This report is intended to provide a comprehensive profile of current visitors and resident attitudes about tourism in Beaverhead County as part of the 1998 Montana Community Tourism Assessment Process (CTAP). The Community Tourism Assessment Process is facilitated by Travel Montana and the Montana State University Extension Service with assistance from the Institute for Tourism and Recreation Research at The University of Montana. Each year, three communities are chosen to participate in the CTAP program from the eligible pool of applicants. The 1998 communities included Beaverhead County, Big Horn County, and Anaconda/Deer Lodge County. Other Montana communities which have used the CTAP process include Choteau, Libby, Lewistown, Glendive, Fort Belknap Indian Reservation, Ravalli County, Three Forks, Glacier County, Deer Lodge, Hill County, Laurel, Livingston, and Powder River County. The initial assessment process takes approximately nine months to complete.

At the conclusion of the assessment process, members of the CTAP committee decide whether further tourism development would be beneficial to the community and, if so, suitable projects are identified and pursued. The decisions about how to proceed are based on consideration of a wide variety of information including present levels and characteristics of travel, existing travel-related infrastructure and attractions, the area's need for economic development, and residents' opinions about tourism. The resident tourism committees are encouraged to continue beyond that time with work that was started using the CTAP.

The Institute for Tourism and Recreation Research at The University of Montana (ITRR) supports CTAP by providing technical assistance to the communities through this visitor and resident profile report. Funding for this research came from the Lodging Facility Use Tax.

To ease understanding, the reader needs to be aware that two separate studies were used in the preparation of this report. First, current nonresident visitor profiles for Beaverhead County and the state of Montana were developed using research conducted by ITRR during the summer of 1996. At that time, a four-month survey was conducted of nonresident summer travelers to Montana. To represent Beaverhead County visitors, a profile of visitors was developed from the subset of surveys that represented nonresident travelers passing through the County. Both statewide and Beaverhead County visitor profiles are provided for comparison purposes. Second, an assessment of resident opinions toward tourism was developed based on mail-back questionnaires obtained from households in Beaverhead County during October and November, 1998. Resident opinions were also obtained from a statewide sample of Montana households during this time. Results from both samples are reported to provide a comparison between visitors to Beaverhead County and to Montana, and a comparison between resident opinions toward tourism in Beaverhead County and Montana.

This report is presented in two sections. The first section provides visitor profiles for Beaverhead County and Montana. The second section provides an assessment of resident attitudes toward tourism in Beaverhead County and Montana.



## SECTION I

Data collected for this section of the report came from ITRR's 1996 Nonresident Summer Travel Study. A full copy of this study can be downloaded from the ITRR Web Site at [www.forestry.umt.edu/itrr](http://www.forestry.umt.edu/itrr).

### THE NONRESIDENT TRAVEL STUDY METHODOLOGY

Travelers to Montana during the summer of 1996 (June 1 – September 30) were intercepted for the Nonresident Travel Study. The traveler population was defined as those persons who entered Montana by private vehicle or commercial air carrier during the study period and whose primary residence was not in Montana at that time. Specifically excluded from the study were those persons traveling in a plainly marked commercial vehicle such as a scheduled or charter bus or semi truck. Also excluded were those travelers who entered Montana by train. Other than the exclusions mentioned above, the study attempted to assess all types of travel to the state including travel for pleasure, business, passing through or any other reason.

Data were obtained through a mail-back diary questionnaire that was administered to a sample of intercepted travelers in the state. During the four-month study period, 12,941 groups were contacted. Usable questionnaires were returned by 5,800 groups for a response rate of 45 percent. (For a complete discussion of the methodology and results of the 1996 Nonresident Summer Travelers to Montana Study, please refer to ITRR Research Reports 51<sup>1</sup> and 52<sup>2</sup>.) To apply this data to specific communities, visitors were identified by travel routes indicated on the questionnaire map. A sample of 160 surveys/travel groups were identified as having traveled through Beaverhead County. The statewide sample included all travelers. Because this study represented nonresident travel, none of the data included Montana residents visiting Beaverhead County. Table 1 shows the nonresident travel sample sizes.

**Table 1:** Sample Sizes and Response Rates for Summer Nonresident Travel Survey Samples Used in this Report

	Statewide	Beaverhead County
Nonresident groups contacted:	12,941	
Usable nonresident travel questionnaires returned:	5,800	
Nonresident Travel Study response rate:	45%	
Beaverhead County Sample size of nonresident travel groups:		160
Percent of all nonresident travel groups:	100%	2.8%

### FINDINGS: A PROFILE OF CURRENT VISITORS

According to the ITRR visitor estimation model, there were 3,803,000 visitor groups (averaging 2.6 people per group) to Montana during 1998<sup>3</sup>. For the entire year, it was estimated that 13 percent of those groups passed through Beaverhead County. Of those visitor groups that traveled through Beaverhead County, 20 percent spent at least one

<sup>1</sup> Parrish, J., N. Nickerson, and K. McMahon (1997). **Nonresident Summer Travelers to Montana: Profiles and Characteristics.** Research Report 51, Institute for Tourism and Recreation Research, School of Forestry, The University of Montana, Missoula, MT 113 pp.

<sup>2</sup> Parrish, J., N. Nickerson and K. McMahon (1997). **Nonresident Summer Travelers to Montana: All Visitors, Cultural Visitors, Canadian Visitors, Highway and Air Traveler Characteristics.** Research Report 52, Institute for Tourism and Recreation Research, School of Forestry, The University of Montana, Missoula, MT 106 pp.

<sup>3</sup> The total number of travelers is estimated each year, while the profile of visitors is only re-evaluated every few years. Therefore, this report presents traveler characteristics that were estimated from data collected in the summer of 1996 applied to the estimated number of travelers and their total economic impacts for 1998.

night in the County. These travel group characteristics were obtained from visitor groups who spent at least one night in Beaverhead County.

While ITRR nonresident travel group data was collected in 1996, visitor characteristics do not change much in a five year time period. Therefore, visitor characteristics to Beaverhead County can be used for numerous years unless new attractions are developed in the area which would draw substantially more visitors or particular types of visitors.

### **Group Characteristics**

Table 2 shows travel group characteristics. There were some differences between the travel groups staying overnight in Beaverhead County and the entire statewide sample. The following results indicate those differences:

Statewide. The average group size of 1998 Montana visitors was 2.6. Seventy-five percent of Montana travelers had visited the state before this trip. Most summer visitors to Montana traveled as couples (38%). Thirty-four percent of Montana visitors traveled with family. Thirty-one percent of male visitors in this sample were 30-49 years old and 24 percent were 50-64 years old. Thirty-three percent of female visitors were 30-49 years old and 25 percent were 50-64 years old. The majority of summer visitors' choice of accommodation while in Montana was motels/hotels (59%) and they stayed, on average, 3 nights.

Beaverhead County. The average travel party size of Montana visitors who stayed overnight in Beaverhead County was 2.4, slightly smaller than all Montana visitor groups. Eighty-four percent of overnight visitors to Beaverhead County were repeat visitors to Montana. Summer overnight visitors were most likely to be traveling as couples (45%). Thirty-one percent of male visitors were 30-49 years old and 29 percent were 50-64 years old. Thirty-five percent of female visitors were 50-64 years old and 27 percent were 30-49 years old. The typical traveler who stayed overnight in Beaverhead County spent 4 nights in the state of Montana and was most likely to stay in a motel (54%) or a campground (public and private campgrounds and undeveloped areas) (54%).

**Table 2:** Characteristics of Summer Nonresident Travelers Visiting Montana

Characteristics:	Statewide %	Beaverhead County* %
<b>Group Type</b>		
Couple	38	45
Family	34	24
Alone	17	23
Friends	7	6
Family & Friends	3	1
Business Associates	1	<1
Group or Club	<1	<1
<b>Group Size</b>	<b>2.6</b>	<b>2.4</b>
<b>Age of Males</b>		
0-17 Years Old	19	15
18-29 Years Old	10	3
30-49 Years Old	31	31
50-64 Years Old	24	29
65+ Years Old	16	20
<b>Age of Females</b>		
0-17 Years Old	18	12
18-29 Years Old	10	13
30-49 Years Old	33	27
50-64 Years Old	25	35
65+ Years Old	14	14
Have visited MT before	75	84
Total nights spent in MT	3	4
<b>Overnight Accommodations Used While in Montana</b>		
Home of friend, relative %	21	21
Hotel, motel %	59	54
Private campground %	18	26
Public campground %	16	18
Undeveloped camp %	4	10
Resort, guest ranch %	5	5
Condominium %	1	0
Other %	5	5

Source: ITRR

\*Characteristics of Montana visitors who stayed at least one night in Beaverhead County.

**Nonresident travelers to Beaverhead County tended to be slightly older than the average nonresident traveler in the state and were more likely to be traveling as couples.**

**Visitors to Beaverhead County were more likely to be repeat visitors to Montana than were other visitors to Montana.**

**APPLICATION: Initiate a "Welcome Back" program to acknowledge non-resident visitors to the community. Use buttons, signs, etc.**

**Visitors to Beaverhed County were much more likely to stay in Campgrounds while in Montana than the statewide sample**

**APPLICATION: This could be an opportunity for development of private campgrounds.**

Visitors to the state, as well as to Beaverhead County, represented a range of states of origin. Table 3 shows the states which were the top five visitor origins. These visitors accounted for approximately 51 percent of all visitors to Beaverhead County and 45 percent of all visitors to the state. Each column in Table 3 lists the states which had the highest representation of visitors to the area in descending order.

**Table 3:** State of Origin of Montana Nonresident Summer Visitors: Top Five States

Statewide	Beaverhead County*
Washington	California
California	Utah
Idaho	Washington
Wyoming	Idaho
Colorado	Nevada

**Visitors to Beaverhead County are different from statewide visitors.**

**APPLICATION: Marketing efforts could be focused in the Salt Lake City area.**

Source: ITRR

\* Characteristics of Montana visitors who stayed at least one night in Beaverhead County.

### Information Sources

During the sampling process, nonresident travel parties indicated which information sources were used to gather information for their trip *prior* to arriving in Montana as well as *while* they were in Montana. Also, respondents indicated which of those information sources were most useful to them. A list of 11 information sources was included in the questionnaire.

**Statewide.** Forty percent of the visitors did not use any of these sources prior to their trip. The top three most frequently used information sources were AAA (31%), travel guide books (22%) and National Park brochures (20%) (Table 4). The *most useful* sources of information prior to arriving in Montana were AAA (39%), travel guide books (19%), and the Montana Travel Planner (12%) (Table 5).

Visitors were also asked where they received travel information *while* in Montana. Travel information sources used most frequently were persons in motels, restaurants, gas stations, etc. (36%), highway information signs (35%), and brochure racks (33%) (Table 6). Visitors then indicated which source was *most useful* while traveling in Montana. Twenty-four percent of respondents stated persons in motels, restaurants, gas stations, etc., were most helpful, followed closely by persons in visitor information centers (22%) (Table 7).

**Beaverhead County.** Over forty percent of overnight visitors to Beaverhead County did not use any of these 11 sources of information prior to travel. Of those Montana visitors to Beaverhead County who used information sources, most commonly used sources included travel guide books (24%), the Montana Travel Planner (19%), AAA (18%), and National Park brochures (14%) (Table 4). The *most useful* source of travel information indicated by Beaverhead County overnight visitors included AAA (28%), travel guide books (24%), and the Montana Travel Planner (15%) (Table 5).

While in Montana, overnight visitors to Beaverhead County indicated that they obtained travel information from persons in motels, restaurants, gas stations, etc., (42%), highway information signs (36%), and brochure racks (30%) (Table 6). Of those information sources used while in Montana, Beaverhead County overnight visitors indicated that the *most useful* sources of information while in Montana were persons in motels, restaurants, gas stations, etc., (28%), other sources (27%), highway information signs (18%), and persons in visitor information centers (15%) (Table 7).

**Table 4:** Sources of Information Used *Prior* to Visit to Montana - Summer Visitors\*

Source:	Statewide %	Beaverhead County %
None of the Sources	40	41
AAA	31	18
Travel Guide Book	22	24
National Park Brochures	20	14
Montana Travel Planner	13	19
1-800 State Travel Number	7	12
Chamber or Visitor Bureau	7	7
Information From Private Businesses	7	6
Internet Travel Information	5	4
State Park Brochures	4	2
Regional Travel Number	1	<1
Attend a Travel Trade Show	<1	1

**Montana visitors to Beaverhead County are most likely to seek travel information from Travel Guide books and the Montana Travel Planner, yet the most useful source stated is AAA.**

**APPLICATION: Local businesses should strive for AAA endorsement.**

Source: ITRR

\* Visitors could choose more than one information source.

**Table 5:** *Most Useful* Source of Information Used *Prior* to Visit to Montana - Summer Visitors \*

Source:	Statewide %	Beaverhead County %
AAA	39	28
Travel Guide Book	19	24
Montana Travel Planner	12	15
National Park Brochures	11	9
Information From Private Businesses	6	4
Chamber or Visitor Bureau	5	7
1-800 State Travel Number	4	7
Internet Travel Information	3	4
State Park Brochures	1	1
Regional Travel Number	<1	0
Attend a Travel Trade Show	<1	0
None	2	2

Source: ITRR

\* Percent total may not equal 100% due to rounding.

**Table 6:** Sources of Information Used *While* Visitors Were in Montana - Summer Visitors\*

Source:	Statewide %	Beaverhead County %
Person in Motel, Restaurant, Gas Station, Etc.	36	42
Highway Information Signs	35	36
Brochure Rack	33	30
Person in Visitor Information Center	26	28
None of the Sources Used	24	22
Other	18	22
Business Billboards	10	14
Computer Touch Screen Info Center	<1	0

**Visitors to Beaverhead County relied heavily on local people for travel information.**

**APPLICATION:**  
Provide the Superhost training program on a regular basis.

**"Other sources" largely included information from friends and family.**

Source: ITRR  
\* Visitors could choose more than one information source.

**Table 7: Most Useful** Source of Information Used *While* Visitors Were in Montana - Summer Visitors\*

Source:	Statewide %	Beaverhead County %
Person in Motel, Restaurant, Gas Station, Etc.	24	28
Person in Visitor Information Center	22	15
Highway Information Signs	19	18
Other	18	27
Brochure Rack	15	10
Business Billboards	2	3
Computer Touch Screen Info Center	0	0

**APPLICATIONS:**  
Develop an "easy to update" information booklet which is left at all front desks & cash registers, in gas stations, restaurants, & retail outlets.

**Start an "Ask Me" program with local merchants.**

Source: ITRR  
\* Percent total may not equal 100% due to rounding.

### Purposes of Summer Trip

Nonresident travel parties were asked all reasons for traveling to Montana (many visitors had more than one reason). Travelers were then asked to identify their *primary* reason (one answer per travel group) for traveling to Montana. The first column of Table 8 lists *all* reasons while the second column lists the *primary* reason.

Statewide. More than three-quarters of all sampled visitors indicated vacation/recreation/pleasure as one reason for traveling to Montana. Other popular purposes of trip included passing through the state (31%) and visiting family/friends (31%).

With respect to statewide travelers' *primary* reason for visiting the state, nearly half of all sampled visitors were in Montana for vacation/recreation/pleasure. Passing through the state (21%) and visiting family/friends (16%) were also stated as primary reasons.

Beaverhead County. Eighty-one percent of all overnight visitors to Beaverhead County indicated vacation/recreation/pleasure as one reason for their trip to Montana. Also frequently mentioned as purposes for traveling by overnight visitors to Beaverhead County were visiting family/friends (33%), and passing through (23%).

Visitors staying overnight in Beaverhead County most frequently cited vacation/recreation/ pleasure (51%) as their *primary* reason for visiting Montana. Passing through the state (20%), and visiting family/friends (18%) were also cited as the *primary* reasons for visiting Montana by visitors staying overnight in Beaverhead County.

**Table 8:** Purposes of Trip to Montana by Summer Nonresident Travelers

Travel Purpose:	Statewide %		Beaverhead County*	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	77	49	81	51
Passing Through	31	21	23	20
Visit Family/Friends	31	16	33	18
Business	10	6	9	4
Recreational	9	1	8	1
Shopping				
Necessity Shopping	4	1	0	0
Other	4	3	4	4
Convention/Meeting	3	2	3	2
Medical	2	1	1	1
		100%		100%

**APPLICATION:**  
Give these people a reason to stop on their trip through your county.

Source: ITRR

\* Visitors could choose more than one reason.

\*\* Percent total may not equal 100% due to rounding.

### Montana Attractions

Travelers indicating vacation as one trip purpose were asked what attracted them to Montana as a vacation destination. Visitors were asked to check *all* things that attracted them to Montana and then to choose what one thing *primarily* attracted them to Montana (Table 9).

Statewide. Many vacationers were attracted by more than one feature. The top five attractions to Montana were the mountains (51%), Yellowstone National Park (39%), rivers (35%), Glacier National Park (31%) and open space (31%). Glacier National Park (25%) was the most popular *primary* attraction to Montana for statewide travelers followed by Yellowstone National Park (22%) and mountains (12%).

Beaverhead County. Overnight visitors to Beaverhead County were also attracted for many reasons. The top attractions to Beaverhead County included mountains (56%), rivers (45%), open space (40%), uncrowded areas (39%), Glacier National Park (33%) and wildlife viewing (33%). The most frequently cited *primary* attractions for overnight visitors to Beaverhead County were Glacier National Park (22%), fishing (20%), mountains (13%), and open space (9%).

**Table 9:** Attraction of Montana as a Vacation Destination by Summer Nonresident Vacation Travelers

Vacation Attraction:	Statewide %		Beaverhead County*		
	Types of Attractions*	Primary Attraction**	Types of Attractions*	Primary Attraction**	
Mountains	51	12	56	13	<p><b>While visitors to Beaverhead County are looking for mountains, rivers, and open spaces, they are basically on their way to Glacier National Park.</b></p>
Yellowstone NP.	39	22	26	5	
Rivers	35	1	45	0	
Glacier NP	31	25	33	22	
Open Space	31	6	40	9	
Wildlife viewing	28	2	33	2	
Uncrowded Areas	27	4	39	3	
Lakes	26	1	27	1	
Camping	19	2	26	2	
Friendly People	18	3	22	2	
National Forest	15	1	19	2	
Hiking	15	1	15	0	
Fishing	14	6	25	20	<p><b>Fishing is one of the top primary reasons visitors to Beaverhead County come to Montana.</b></p> <p><b>APPLICATION:</b>  <b>Fishing equipment and guiding trips could be a potential business opportunity.</b></p> <p><b>Provide information to good fishing access areas.</b></p>
Historic Sites	13	2	23	4	
Montana History	11	1	23	2	
Indian Culture	10	1	17	2	
Spec. Attraction	8	6	13	8	
Wilderness Area	8	1	5	0	
N Great Plains	6	<1	8	0	
Badlands	6	1	3	0	
State Park	6	<1	7	0	
Special Event	4	4	4	4	
		100%		100%	

Source: ITRR

\* Visitors could choose more than one type of attraction.

\*\* Percent total may not equal 100% due to rounding.

## Visitor Activities

Table 10 lists activity participation rates by nonresident summer travelers to Montana. Wildlife watching was the top activity in both samples.

**Statewide.** Wildlife watching was the most popular activity among the statewide sample (45%). Other activities in which visitors participated, in order of popularity, were visiting family/friends (34%), nature photography (33%), recreational shopping (32%), day hiking (29%), and visiting historic/interpretive sites (29%).

**Beaverhead County.** Wildlife viewing (44%) and nature photography (44%) were the most popular recreation activities indicated by travelers who stayed overnight in Beaverhead County. Other popular activities included visiting historic/interpretive sites (39%), camping in developed areas (37%), visiting family/friends (35%), and recreational shopping (34%).

**Table 10:** Recreation Activity Participation of Summer Visitors to Montana \*

Recreation Activity:	Statewide	Beaverhead
	%	County %
Wildlife watching	45	44
Visiting family/friends	34	35
Nature photography	33	44
Recreational shopping	32	34
Day hiking	29	25
Historic/Interpretive Sites	29	39
Camping in developed areas	28	37
Picnicking	26	16
Visiting museums	21	23
Fishing	15	27
Swimming in pools	14	13
Gambling	10	15
Camping in primitive areas	10	19
Visit Native American Sites	10	16
Nature Studies	9	7
Special Events/Festivals	8	9
Swimming in natural areas	7	8
River rafting/floating	6	3
Golfing	5	6

**Montana visitors who stayed in Beaverhead County were more likely than Montana visitors in general to engage in wildlife watching & photography, visit historic/interpretive sites, and camp.**

**APPLICATION: Develop networks of self-guided trips within Beaverhead County to watch wildlife, photography, and local historic points of interest and make them available at motels, businesses, and information racks.**

Source: ITRR

\*Visitors could choose more than one activity.

## Economic Characteristics

Information about the number of visitors to an area and how much they spend is very useful for planning purposes. While travel group characteristics are based only on groups that spent a night in Beaverhead County, economic information is much more inclusive. Table 11 summarizes visitation and expenditures in Montana and Beaverhead County (and includes all groups that spent any time in the County).

ITRR staff estimated that 3,803,000 travel groups visited Montana in 1998. Of those 3.8 million travel groups, approximately 500,000 (13%) went through Beaverhead County.

Statewide. Nonresident visitors spent in excess of \$1.5 billion dollars in the state during 1998. This amounted to about \$1,740 per person living in the state (Table 11).

Beaverhead County. Nonresident spending in Beaverhead County totaled \$18,670,000 in 1998, or 1.2 percent of all nonresident traveler spending in Montana. Nonresidents spent the equivalent of \$2,072 per person in the county (Table 11).

**Table 11:** Visitation and Expenditures of Nonresident Travelers in Beaverhead County

<b>Distribution of Expenditures in Sample Area:</b>	<b>Statewide</b>	<b>Beaverhead County</b>
Hotel, Lodge, Campgrounds, RV Park, B&B %	17%	24%
Auto Rental, Repair and Transportation %	4%	<1%
Gasoline, Oil %	22%	37%
Restaurant, Bar %	18%	21%
Groceries, Snacks	8%	6%
Retail Sales %	24%	10%
Miscellaneous Services %	6%	3%
Total Travel Groups to Sample Area in 1998	3,550,000	500,000
Total Expenditures in Sample Area in 1998	\$1,519,000,000	\$18,670,000
Per Capita Expenditures in Area (1990 US Census)	\$1,740	\$2,072

Source: ITRR

## SECTION II

Data collection for this section of the report came from the ITRR Resident Opinion Study conducted during the fall of 1998.

### METHODOLOGY: THE MONTANA RESIDENT OPINION STUDY

A mail-back questionnaire was administered to a randomly selected sample of 500 residents of Beaverhead County and to a statewide sample of 1000 Montana residents during October, and November, 1998. That initial mailing was followed one week later by a reminder postcard and two weeks after that by a replacement questionnaire to those residents who had not yet responded.

A nonresponse bias check was not conducted at the conclusion of the sampling effort. Nonresponse bias checks are generally conducted to determine if people in the sample who did not respond to the questionnaire differed on key issues from those who did respond. In this case, the key questions that may have differed between respondents and nonrespondents involved statements about support for tourism development. These key questions could only be answered after answering numerous other questions asked in the survey. Therefore, it was not possible to develop a condensed telephone nonresponse questionnaire. Because of this reason, it was decided that comparable data could not be generated from telephone nonrespondent interviews.

The reader is cautioned to bear in mind that these results represent opinions from 32 percent of those Beaverhead County residents polled. It was assumed that respondents did not differ from nonrespondents in their opinions. Because the age distribution of respondents of the survey differed greatly from the July 1, 1997, census estimates<sup>4</sup> of age group categories, responses were adjusted to more closely reflect the population of Beaverhead County residents. Table 12 summarizes sample sizes and response rates for the Resident Opinion Study.

**Table 12:** Sample Sizes and Response Rates for the Survey Samples used in this Report

	Statewide	Beaverhead County
Resident questionnaires mailed:	1000	500
Undeliverables:	100	31
Resident questionnaires returned:	364	149
Resident Opinion Study response rate:	40%	32%
Female/male response ratio	40:60	51:49

As a community pursues tourism as a development strategy, the goals of that effort generally include an improved economy, more jobs for local people, community stability, and ultimately, a protected or improved quality of life for the community's residents. Understanding residents' perceptions of the conditions of their surroundings and tourism's influence on those conditions can provide guidance toward appropriate development decisions.

Residents of an area may hold a variety of opinions about tourism and other forms of economic development. They may have both positive and negative perceptions of the specific impacts of tourism. Opinions are a good measure for determining the level of support for community and industry actions.

The resident opinion questionnaire addressed a number of topics which provide a picture of perceived current conditions and tourism's role in the community. The following general areas are covered in this section:

<sup>4</sup> U.S. Bureau of Census, Population Division. Derived from data set released as PE-64, "Estimates of the Population of Counties by Age, Sex, Race, and Hispanic Origin: 1990 to 1997".

- 1) Respondent Characteristics
- 2) Residents' Attitudes and Opinions about Tourism
- 3) Beaverhead County Specific Questions

## FINDINGS: CURRENT RESIDENT OPINIONS OF TOURISM DEVELOPMENT

### Respondent Characteristics

A number of survey questions related to respondent characteristics. These questions are asked in order to verify that the sample group is reflective of the population in general as well as to be able to make comparisons between Beaverhead respondents and respondents to the statewide survey which was conducted at the same time. Initially, the study sample of resident did not accurately reflect the population of Beaverhead County in terms of portion of individuals in each age group category included in the July 1, 1997, census estimates<sup>5</sup>. Therefore, respondent characteristics and responses were adjusted to more closely reflect the population of Beaverhead County.

**Age and gender:** Respondents were asked to indicate their gender as well as their age.

Statewide. Sixty percent of respondents to the statewide survey were male. The remaining 40 percent were female. The average age of respondents to the statewide survey was 48 years with respondents ranging in age from 23 to 89 years of age (Table 13).

Beaverhead County. The respondents were very equally divided between male and female. Forty-nine percent of respondents were male and 51 percent were female. Respondents from Beaverhead County ranged in age from 22 years to 95 years with an average age of 47 years (Table 13).

**Table 13:** Respondents Age Characteristics

<b>Age:</b>	<b>Statewide</b>	<b>Beaverhead County</b>
Average Age	48 years	47 years
Percent Male	60%	49%
Percent Female	40%	51%
Minimum Age	23 years	22 years
Maximum Age	89 years	95 years

**Montana Native:** Survey subjects were asked, "Were you born in Montana?"

Statewide. Over half (58%) of survey respondents were native Montanans (Table 14).

Beaverhead County: Over half (61%) of Beaverhead County respondents were native .Montanans (Table 14).

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<sup>5</sup> **Ibid.**

**Table 14:** Respondents' Residency Characteristics

<b>Residency:</b>	<b>Statewide</b>	<b>Beaverhead County</b>
Born in Montana	58%	61%
Mean years lived in the county	24 years	26 years
Mean years lived in Montana	35 years	36 years
Age (Mean Years)	48 years	47 years
Percentage of life spent in county	50%	56%
Percentage of life spent in Montana	73%	78%

**Length of Residence:** Subjects were asked two questions related to length of residence. Subjects were asked to indicate how long they had resided in their county, as well as how long they had lived in the state of Montana.

Statewide. Respondents' average length of residence in their county was 24 years. On average, respondents had lived in the State of Montana for 35 years (Table 14). Seventeen percent of respondents had lived in their county 40 years or longer, while 31 percent had lived in their county less than 10 years (Table 15).

Beaverhead County. On average, Beaverhead County respondents had lived in the county for 26 years. The average length of residence in Montana was 36 years for Beaverhead County respondents (Table 14). Eighteen percent of respondents had lived in Beaverhead County over 40 years (Table 15).

**Table 15:** Respondents' Length of County Residency

<b>Residency:</b>	<b>Statewide %</b>	<b>Beaverhead County %</b>
Less than 10 years	31%	28%
11 to 20 years	21%	14%
21 to 30 years	14%	20%
31 to 40 years	17%	19%
41 to 50 years	8%	7%
51 to 60 years	3%	6%
61 and Over	6%	5%

**Employment Status:** A person's employment status, type of job, and economic work sector can all influence personal well-being and support for tourism. In general, the more dependent a person is financially on the tourism industry, the higher the support for tourism. Table 16 shows employment status of the respondents.

Statewide. Professionals made up the largest group of respondents to the statewide survey, making up 27 percent of those responding. Retirees made up the second largest group of respondents (22%). No other employment category was represented by more than 7 percent of the respondents.

Beaverhead County. As with the statewide sample, Professionals made up the largest portion of respondents (23%). Retirees made up 19 percent of respondents. Farmers and ranchers made up nine percent of respondents.

**Table 16:** Employment Status of Resident Respondents

<b>Employment Status:</b>	<b>Statewide %</b>	<b>Beaverhead County %</b>
Unemployed	1%	3%
Retired	22%	19%
Student	2%	3%
Homemaker	2%	6%
Laborers	7%	5%
Farmer/Rancher	3%	9%
Farm/Ranch Laborer	<1%	3%
Clerical	5%	4%
Armed Forces	1%	0%
Service Worker	5%	4%
Professional	27%	23%
Educator	6%	8%
Manager/Self Employed	7%	5%
Sales	7%	7%
Craftsman	4%	5%

**Professionals were the largest respondent group to complete the survey, followed by retirees.**

**Place of Residence:** Residents were asked to indicate whether they lived in a town or in a rural area.

Statewide. Nearly half (48%) of respondents indicated that they lived in a town over 20,000 population. Respondents from rural areas made up 26 percent of the respondents. (Table 17)

Beaverhead County. The majority of respondents (57%) from Beaverhead County indicated that they lived in a town of less than 20,000 population (Table 17).

**Table 17:** Respondents' Place of Residence

<b>Community Type:</b>	<b>Statewide %</b>	<b>Beaverhead County %</b>
Community of 20,000 or more	45%	1%
Community of less than 20,000	28%	57%
Rural area	26%	42%

## Tourism and the Economy

Several survey questions related to the local economy and the role tourism has in the local economy. Residents were asked, "Compared to other industries, how important a role do you think tourism should have in your community/county's economy?" In addition, residents ranked industries on a scale of 1 (best) through 8 (worst) indicating which they believed offered the best opportunity for future economic growth for their community/county.

Statewide. The majority (56%) of respondents believed that tourism should play a role equal to other industries in the economy while a third (33%) thought tourism should play a relatively minor role in the local economy (Table 18). Tourism ranked fifth behind retail & wholesale trade, agriculture/agribusiness, services, and manufacturing, as offering the best opportunity for economic development (Table 19).

Beaverhead County. The largest segment of respondents felt that tourism should play an equal role with other industries in the county's economy, while over one third (40%) felt tourism should play a minor role (Table 18). When asked which industries offered the best potential for economic development in Beaverhead County, tourism ranked second behind agriculture/agribusiness (Table 19).

**Table 18:** Role of Tourism in County Economy

	Statewide %	Beaverhead County %
A minor role	33%	40%
A role equal to other industries	56%	49%
A dominant role	11%	12%

**Table 19:** Best Opportunity for Economic Development

Industry	Statewide		Beaverhead County	
	Rank	Mean*	Rank	Mean*
Retail & wholesale trade	1	2.97	4	4.23
Agriculture/Agribusiness	2	3.25	1	2.36
Services (health, business, etc)	3	3.42	3	4.18
Manufacturing	4	3.74	7	4.66
Tourism/recreation	5	3.88	2	3.70
Wood products	6	4.83	6	4.34
Mining	7	5.52	5	4.27

**Beaverhead County residents ranked tourism second behind agriculture/agribusiness as offering the best potential for future economic development.**

\*Scores represent mean responses measured on a scale from 1 (best opportunity) to 8 (worst opportunity).

## Dependence on Tourism

Several questions were designed to determine the extent to which respondents felt they were dependent upon the tourism industry. Respondents were asked their level of agreement or disagreement with the statement, "I will benefit financially if tourism increases in Beaverhead County." Further, subjects were asked to indicate how dependent their job was on tourism.

Statewide. Three percent of respondents indicated that their job was very dependent on tourism, while three-fourths of all statewide respondents indicated that their job was not at all dependent on tourism. (Table 20)

Beaverhead County. Only one percent of Beaverhead County respondents felt their job was very dependent on tourism. Likewise, nearly 80 percent felt that their job was not at all dependent on tourism (Table 20).

**Table 20:** Income Dependence on Tourism

Dependence	Statewide %	Beaverhead County %
Very dependent	3%	1%
Somewhat dependent	22%	19%
Not at all dependent	<b>75%</b>	<b>79%</b>

**The greatest majority of Beaverhead County respondents do not feel they are economically dependent on tourism.**

## Interactions with Tourists

The extent to which respondents interact with tourists affects the attitudes and opinions residents hold toward tourism. In addition, an individual's behavior is often a reflection of their attitudes and opinions. Respondents were asked several questions to determine the extent to which they interact with tourists on a day-to-day basis as well as to determine the quality of those interactions.

Statewide. When asked about the frequency of their day-to-day interaction with tourists, 10 percent indicated that they had regular contact, and 31 percent reported having somewhat frequent contact with tourists. An additional 43 percent indicated that they had infrequent contact with tourists (Table 21). Only seven percent of respondents made an effort to avoid tourists in their community, while 59 percent made an effort to make visitors feel welcome (Table 22).

Beaverhead County. Over half of respondents from Beaverhead County indicated that they had somewhat frequent or regular contact with tourists. Ten percent indicated that they almost never had contact with tourists (Table 21). Over half of respondents indicated that they made an effort to make visitors feel welcome when they encountered them. Eleven percent of respondents tried to avoid tourists when encountered (Table 22).

**Table 21:** Interactions with Tourists

Frequency of Interactions	Statewide %	Beaverhead County %
Regular	10%	16%
Somewhat Frequent	31%	40%
Infrequent	43%	34%
Almost Never	16%	10%

**Over half of Beaverhead County respondents have regular or somewhat frequent contact with tourists during their day-to-day activities.**

**Table 22:** Resident Behavior Toward Tourists

Behavior	Statewide %	Beaverhead County %
Make them feel welcome	59%	51%
No specific reaction	34%	38%
Try to avoid them	7%	11%

**Residents of Beaverhead County are slightly less likely to try to make visitors feel welcome as was the statewide sample.**

### Community Attachment and Change

One measure of community attachment is the length of time and percentage of life spent in a community or area. Length of residence was reported earlier in this report in Table 14. Another measure of community attachment is based on opinions which residents hold about the community (Table 23). Respondents indicated their level of agreement with each of four statements on a scale of 1 (strongly agree) to 4 (strongly disagree). A response greater than 2.5 indicates agreement while a response of less than 2.5 indicates disagreement. Finally, Table 24 presents the degree to which respondents felt their community was growing and at what rate.

Statewide. The average age of statewide respondents was 48 years. On average, these respondents have lived in Montana 35 years (or 73 percent of their lives) and in their county 24 years (or 50 percent of their lives) (Table 14). In general, the higher percent of life one lives in a community, the more attached one is to that community.

The Index of Community Attachment (i.e., the mean of the four community attachment statements) in Table 23 indicates that statewide respondents were quite attached to their community. An average rating of 3.16 (on a scale from 1 to 4) shows that these residents like where they live. Respondents were very positive in their feelings about their community except in regard to their opinions about it's future. This item had the lowest average score of the four items making up the community attachment index (Table 23).

Residents were asked whether they perceived the population of their community/county to be changing and, if so, at what rate. Statewide, 71 percent of respondents felt the population of their county was growing. Eleven percent reported that it was decreasing (Table 24). Of those who felt the population was changing, nearly half felt it was changing too fast, while 46 percent felt it was changing at about the right rate.

In summary, respondents around Montana were attached to their community in spite of the fact that they felt their community was growing too fast. However, Montana residents are a little uncertain about the future of their community/county.

**Beaverhead County.** The average age of the respondent was 47 years old. On average, Beaverhead County respondents had lived in their county 26 years (or 56 percent of their lives). The average respondent had lived in Montana 36 years (or 78 percent of their lives) (Table 14).

Beaverhead County resident responses to the four community attachment statements were very much like the responses received by the statewide sample. In general, residents feel strongly about their community, but show the most reservation when asked about the future (Table 23). Beaverhead County respondents generally feel that the county is growing, but are about evenly divided as to whether it is growing too fast or at about the right pace (Table 24).

**Table 23: Community Attachment Statements**

Statement:	Statewide Mean*	Beaverhead County Mean*
It is important that the residents of my community be involved in decisions about tourism	3.43	3.52
If I had to move away from my community, I would be very sorry to leave	3.34	3.35
I'd rather live in my community than anywhere else	3.08	3.05
I think the future of my community looks bright	2.79	2.66
<b>Index of Community Attachment</b>	<b>3.16</b>	<b>3.16</b>

\* Scores represent mean responses measured on a scale from 4 (Strongly Agree) to 1 (Strongly Disagree)

**Beaverhead County residents should be included in planning.**

**APPLICATION: Involve citizens in all aspects of the tourism planning process.**

**Beaverhead County residents generally feel good about their community, but are somewhat concerned about the future.**

**Table 24: Perceptions of Community Growth**

Growth Characteristics:	Statewide %	Beaverhead County %
<b>How is the population changing in your community?</b>		
Growing	71%	75%
Decreasing	11%	4%
Not changing	18%	21%
<b>If changing, is your community changing..</b>		
Too fast?	49%	48%
About right?	46%	47%
Too slow?	5%	6%

**Beaverhead County respondents believe their community is growing, but are about equally divided as to whether it is growing at the right pace or too fast.**

## The Quality of Community Life

When evaluating the potential for community tourism development, it is necessary to gain an understanding of residents' perceptions of the quality of life in their community and their perception of the impact tourism has on that quality of life. A number of factors contribute to the quality of life in any community. These factors include the availability and quality of public services, infrastructure, freedom from stressors such as crime and unemployment, and overall livability issues such as cleanliness and friendliness.

To that end, respondents were asked to rate the condition of a number of factors that influence the quality of community life using a four point scale ranging from 4 (very good condition) to 1 (very poor condition), or "don't know". Table 25 is a listing of various factors which influence the quality of community life. Scores greater than 2.5 indicate perceptions of good conditions while scores less than 2.5 indicate perceptions of poor conditions.

Statewide. Overall, respondents felt that emergency services, overall community livability, opportunities for museums and cultural experiences, parks and recreation areas, and the educational system in their community were in good to very good condition. In the opinion of the respondents, factors which need improvement included job opportunities, condition of roads, and cost of living.

Beaverhead County. Respondents from Beaverhead County rated emergency services, the educational system, safety from crime, overall community livability, parks & recreation areas, and infrastructure to be in good to very good condition in their community. Characteristics which received a relatively low condition rating include availability of jobs, condition of roads & highways, and cost of living.

**Table 25:** The Quality of Community Life

How would you rate the <i>present condition</i> of...	Statewide Mean*	Beaverhead County Mean*
Emergency services (police, fire, etc)	3.37	3.47
Overall community livability	3.20	3.14
Museums and cultural centers	3.19	2.99
Parks and recreation areas	3.10	3.11
Educational system	3.07	3.37
Overall cleanliness and appearance	2.96	2.75
Infrastructure (water, sewer, etc.)	2.93	3.03
Safety from Crime	2.91	3.24
Traffic congestion	2.41	2.59
Cost of living	2.36	2.24
Condition of roads and highways	2.35	2.02
Job opportunities	2.08	1.88

\*Scores represent mean responses measured on a scale from 4 (Very Good Condition) to 1 (Very Poor Condition)

**Beaverhead County residents feel safer from crime than residents statewide.**

**Like all Montanans, Beaverhead County residents are most concerned about jobs.**

## **Influence of Tourism on Quality of Community Life**

Residents' attitudes about factors that influence the quality of community life will give planners an idea of the image which their own residents hold of their community. These factors can be perceived as good or bad for any number of reasons, and some of these factors can change quite quickly. Traffic may be perceived as terribly congested because highway construction has detoured traffic through a normally quiet part of town. Feelings of safety from crime may be shaken by a random act.

Of importance to this study was the extent to which residents feel tourism has influenced the quality of community life. Respondents were asked to rate the influence that tourism had on these quality of community life variables. The scale included values for positive influence, both positive and negative influence, negative influence, no influence, and "don't know".

Statewide. Most respondents felt that tourism has had more of a negative than positive impact on these factors of community life. Respondents thought that tourism has a positive influence on museums and cultural centers, job opportunities, and parks and recreation areas. Factors upon which tourism has a more negative impact include traffic congestion, safety from crime, condition of roads and highways, and cost of living (Table 26).

Beaverhead County. Overall, respondents felt that tourism has had a more negative than positive influence on these community variables. The outstanding exception to this is in regard to tourism's influence on museums and cultural centers, job opportunities, and parks and recreation areas. Tourism's greatest negative influence was on traffic congestion, condition of roads, safety from crime, and cost of living.

**Table 26:** Influence of Tourism on Selected Quality of Community Life Factors

**The Influence of Tourism on:**

		<b>In Percents</b>				
		<b>No Influence</b>	<b>Negative influence</b>	<b>Positive &amp; Negative</b>	<b>Positive Influence</b>	<b>Don't Know</b>
Emergency services (police, fire, etc)	<b>Beaverhead</b> →	<b>34%*</b>	<b>20%</b>	<b>28%</b>	<b>12%</b>	<b>8%</b>
	<i>Statewide</i> →	<i>39*</i>	<i>14</i>	<i>22</i>	<i>11</i>	<i>14</i>
Museums and cultural centers		<b>6</b>	<b>2</b>	<b>20</b>	<b>71</b>	<b>1</b>
		<i>9</i>	<i>2</i>	<i>16</i>	<i>64</i>	<i>10</i>
Job opportunities		<b>9</b>	<b>18</b>	<b>36</b>	<b>32</b>	<b>5</b>
		<i>19</i>	<i>12</i>	<i>29</i>	<i>33</i>	<i>7</i>
Educational system		<b>38</b>	<b>17</b>	<b>26</b>	<b>9</b>	<b>11</b>
		<i>52</i>	<i>9</i>	<i>18</i>	<i>10</i>	<i>11</i>
Cost of living		<b>6</b>	<b>44</b>	<b>31</b>	<b>11</b>	<b>8</b>
		<i>18</i>	<i>32</i>	<i>32</i>	<i>9</i>	<i>9</i>
Safety from Crime		<b>7</b>	<b>56</b>	<b>27</b>	<b>5</b>	<b>5</b>
		<i>23</i>	<i>32</i>	<i>30</i>	<i>4</i>	<i>10</i>
Condition of roads and highways		<b>4</b>	<b>60</b>	<b>23</b>	<b>9</b>	<b>4</b>
		<i>12</i>	<i>40</i>	<i>30</i>	<i>12</i>	<i>6</i>
Infrastructure (water, sewer, etc.)		<b>29</b>	<b>33</b>	<b>24</b>	<b>3</b>	<b>13</b>
		<i>38</i>	<i>21</i>	<i>22</i>	<i>6</i>	<i>12</i>
Traffic congestion		<b>2</b>	<b>74</b>	<b>17</b>	<b>6</b>	<b>3</b>
		<i>11</i>	<i>58</i>	<i>20</i>	<i>7</i>	<i>5</i>
Overall community livability		<b>10</b>	<b>33</b>	<b>45</b>	<b>6</b>	<b>6</b>
		<i>22</i>	<i>18</i>	<i>41</i>	<i>11</i>	<i>9</i>
Parks and recreation areas		<b>5</b>	<b>28</b>	<b>30</b>	<b>31</b>	<b>5</b>
		<i>11</i>	<i>13</i>	<i>40</i>	<i>31</i>	<i>6</i>
Overall cleanliness and appearance		<b>7</b>	<b>40</b>	<b>37</b>	<b>11</b>	<b>5</b>
		<i>11</i>	<i>23</i>	<i>39</i>	<i>21</i>	<i>7</i>

**According to the respondents, the only strong positive impact tourism provides is on museums and cultural centers.**

**County residents see tourism as negatively affecting their cost of living, safety, road & traffic conditions.**

**APPLICATION:  
Move slowly in making changes and be sure to take these issues into your planning.**

\*Beaverhead County percentages in boldface, statewide percentages in italics.

## RESIDENTS' ATTITUDES AND OPINIONS ABOUT TOURISM

In addition to tourism's perceived influence on well-being, another method of measuring the degree of tourism support is to ask respondents questions specific to the tourism industry and about their interactions with tourists. To this end, respondents were asked to indicate the level of agreement or disagreement with a number of tourism-related questions. Responses were coded on a scale from 4 (strongly agree) to 1 (strongly disagree). Results should be interpreted as follows: a score higher than 2.5 indicates a positive opinion, a score less than 2.5 indicates a negative opinion.

### Support for Tourism Development

Some questions addressed general support for tourism development while others addressed more specific aspects of tourism. Table 27 presents responses to statements related to support for tourism development along with an average response for each item. A 4-point scale was used for responses.

Statewide. Over two-thirds of respondents believe that their community/county is an attractive place to invest in tourism development. Sixty-four percent believe that tourism would help their community/county grow in the "right" direction. Eighty-five percent believe that tourism promotion by Montana benefits their community/county. Over eighty percent support continued tourism promotion by Montana. Not as many residents believe that they would personally benefit if tourism increased in their community/county. Only 31 percent felt they would personally benefit by increased tourism. Over three-quarters of respondents believed that the benefits of tourism outweighed the negative effects. Finally, respondents were about equally split on whether increased tourism would result in increased quality of life in their community/county with 48 percent disagreeing and 52 percent agreeing.

Beaverhead County. Overall, Beaverhead County respondents were not as positive about their county's tourism development potential as the statewide respondents. Over 50 percent thought their county was an attractive place to invest in tourism development. Just under half believe that tourism can help the county grow in the "right" direction. Eighty-five percent believe tourism promotion by Montana has benefited their community but only 70 percent support continued tourism promotion by Montana. Over 80 percent of respondents do not feel that they will personally benefit by increased tourism in Beaverhead County. Nearly 60 percent believe that the benefits of tourism outweigh the negative impacts. Finally, over 60 percent of Beaverhead County respondents do not believe increasing tourism will result in a better quality of life.



**Table 27: Support for Tourism Development\***

**Statement:**

		Strongly Agree %	Agree %	Disagree %	Strongly Disagree %	Average Score**
Tourism promotion by Montana benefits my county economically	<b>Beaverhead</b> → <b>18%*</b>	<b>67%</b>	<b>9%</b>	<b>5%</b>	<b>2.98</b>	
	<i>Statewide</i> → 23	62	12	3	3.04	
I support continued tourism promotion and advertising to out-of-state visitors by the State of Montana		<b>22</b>	<b>48</b>	<b>17</b>	<b>12</b>	<b>2.81</b>
		30	52	11	7	3.05
The overall benefits of tourism outweigh the negative impacts		<b>13</b>	<b>44</b>	<b>31</b>	<b>11</b>	<b>2.59</b>
		14	62	17	7	2.83
Increased tourism would help my county grow in the right direction		<b>16</b>	<b>33</b>	<b>30</b>	<b>20</b>	<b>2.45</b>
		19	45	26	10	2.74
If tourism increases in Montana, the overall quality of life for Montana resident will improve		<b>5</b>	<b>31</b>	<b>40</b>	<b>24</b>	<b>2.17</b>
		6	46	37	11	2.47
My community/county is an attractive place to invest in new tourism development		<b>14</b>	<b>42</b>	<b>34</b>	<b>10</b>	<b>2.61</b>
		21	47	26	6	2.83
I will benefit financially if tourism increases in my county		<b>3</b>	<b>15</b>	<b>51</b>	<b>31</b>	<b>1.91</b>
		8	23	43	25	2.15

**Beaverhead County residents support tourism promotion, believe the benefits of tourism outweigh the negative impacts, think their community is an attractive place for tourism investment, but do not think they will personally benefit and that tourism will damage the quality of life of their community.**

\***Beaverhead County percentages in boldface**, statewide percentages in italics.

\*\*Scores represent mean responses measured on a scale from 4 (strongly agree) to 1 (strongly disagree).

**Concerns about Increased Tourism**

Residents of a community may become concerned about changes which will impact the quality of life they have come to expect in their community. Increased tourism brings with it a number of changes in any community. The extent to which residents see these changes as positive or negative will impact their support for tourism development. A 4-point scale was used for responses.

Statewide. Over three-fourths (78%) of Montanans surveyed would support land-use regulations to control future growth in their community. Over half (52%) of respondents agreed that vacationing in Montana influenced too many people to move here. In spite of this, 61 percent do not feel like the state is becoming overcrowded by tourists (Table 28).

Beaverhead County. County respondents were consistent with statewide respondents in their responses. Over half of Beaverhead County respondents do not feel the state is becoming overcrowded because of tourists. Seventy-five percent would support land use regulations to control future community growth (Table 28).

**Table 28: Concerns about Increased Tourism\***

**Statement:**

		<b>Strongly Agree %</b>	<b>Agree %</b>	<b>Disagree %</b>	<b>Strongly Disagree %</b>	<b>Average Score**</b>
I would support land-use regulations to help control the type of future growth in my community/county.	<b>Beaverhead</b> →	<b>33%*</b>	<b>42%</b>	<b>16%</b>	<b>9%</b>	<b>2.98</b>
	<i>Statewide</i> →	<i>24</i>	<i>54</i>	<i>16</i>	<i>6</i>	<i>2.97</i>
Vacationing in Montana influences too many people to move to Montana		<b>30</b>	<b>28</b>	<b>38</b>	<b>5</b>	<b>2.82</b>
		<i>21</i>	<i>31</i>	<i>42</i>	<i>6</i>	<i>2.67</i>
In recent years, the state is becoming overcrowded because of more tourists		<b>22</b>	<b>23</b>	<b>51</b>	<b>4</b>	<b>2.63</b>
		<i>14</i>	<i>25</i>	<i>51</i>	<i>10</i>	<i>2.43</i>

**Beaverhead County residents would regulate their land to control growth and think too many vacationers move here.**

\***Beaverhead County percentages in boldface, statewide percentages in italics.**

\*\*Scores represent mean responses measured on a scale from 4 (strongly agree) to 1 (strongly disagree).

**Concerns about Land Use Issues**

Montana has a rich land heritage. A large part of the attraction and charm of Montana is its wide open spaces. Subjects were asked their agreement or disagreement to several statements related to land use issues. Again, a 4-point scale was used.

Statewide. Seventy percent of respondents agreed that there was adequate undeveloped open space in their community/county. Over two-thirds (68%) were concerned about the disappearance of open space. Only 37 percent of respondents felt that their access to recreation opportunities was limited because of the presence of out-of-state visitors (Table 29).

Beaverhead County. Residents of Beaverhead County who were surveyed were similar to statewide respondents on these items. Over 75 percent of respondents indicated that they were concerned about the disappearance of open space in the county. Almost two-thirds (64%) of respondents feel there is adequate undeveloped open space in Beaverhead County (Table 29).

**Table 29:** Land Use Issues

**Statement:**

		<b>Strongly Agree %</b>	<b>Agree %</b>	<b>Disagree %</b>	<b>Strongly Disagree %</b>	<b>Average Score**</b>
There is adequate undeveloped open space in my community/county.	<b>Beaverhead</b> →	<b>14%*</b>	<b>50%</b>	<b>25%</b>	<b>12%</b>	<b>2.66</b>
	<i>Statewide</i> →	<i>18</i>	<i>52</i>	<i>17</i>	<i>13</i>	<i>2.77</i>
I am concerned about the potential disappearance of open space in my community/county.		<b>43</b>	<b>34</b>	<b>20</b>	<b>3</b>	<b>3.16</b>
		<i>31</i>	<i>37</i>	<i>28</i>	<i>4</i>	<i>2.95</i>
My access to recreation opportunities is limited due to the presence of out-of-state visitors.		<b>18</b>	<b>28</b>	<b>44</b>	<b>11</b>	<b>2.53</b>
		<i>10</i>	<i>27</i>	<i>54</i>	<i>10</i>	<i>2.37</i>

**While Beaverhead County residents think there is adequate open space, they are concerned that the open space will disappear, and many believe their access has been limited because of out-of-state visitors.**

\***Beaverhead County percentages in boldface**, statewide percentages in italics.

\*\*Scores represent mean responses measured on a scale from 4 (strongly agree) to 1 (strongly disagree).

**Tourism Related Decision Making**

Residents have strong feelings about participating in decisions which will ultimately affect their community and their own lives. Residents were asked to respond to two items related to who should be making decisions about tourism development in their community/county. Again, a 4-point scale was used.

Statewide. Respondents feel strongly that residents be involved in decision making about local tourism development. Ninety-seven percent of respondents agreed with the statement "it is important that residents of my community be involved in decisions about tourism". Sixty-one percent of respondents disagreed with the statement "decisions about how much tourism there should be in my community/county are best left to the private sector" (Table 30).

Beaverhead County. Beaverhead County respondents were consistent with statewide respondents on questions related to tourism-related decision making. Ninety-eight percent of respondents feel that residents should be involved in tourism decision making. Forty-nine percent feel that tourism-related decisions should not be left entirely to the private sector (Table 30).

**Table 30:** Tourism-Related Decision Making

**Statement:**

		Strongly Agree %	Agree %	Disagree %	Strongly Disagree %	Average Score**
It is important that residents of my community/county be involved in decisions about tourism.	Beaverhead →	<b>55%*</b>	<b>44%</b>	<b>1%</b>	<b>1%</b>	<b>3.52</b>
	Statewide →	<i>49</i>	<i>46</i>	<i>5</i>	<i>&lt;1</i>	<i>3.43</i>
Decisions about how much tourism there should be in my community/county are best left to the private sector.		<b>15</b>	<b>36</b>	<b>36</b>	<b>13</b>	<b>2.52</b>
		<i>12</i>	<i>28</i>	<i>44</i>	<i>17</i>	<i>2.34</i>

**Residents feel strongly that they should be involved in decision making related to tourism development.**

\*Beaverhead County percentages in boldface, statewide percentages in italics.

\*\* Scores represent mean responses measured on a scale from 4 (Strongly Agree) to 1 (Strongly Disagree).

**Advantages/Disadvantages of Tourism Development**

To further clarify the perceived benefits and costs of tourism development, respondents were asked to provide the top advantage and disadvantage of increased tourism in their community. This was an open-ended question with respondents providing their own thoughts and wording. The suggestions were then assigned to general themes for comparison. Table 31 lists the top advantages and Table 32 lists the top disadvantages of increased tourism. Appendix C contains a list of all responses.

Statewide. The top advantages by all respondents were overall economic benefits, i.e. dollars, jobs, profit, etc. Over 80 percent of the statewide sample indicated employment, jobs, and profits for local businesses as the top advantages (Table 31). Wear and tear on roads/infrastructure stress and overcrowding at attractions lead the disadvantages cited by statewide respondents (Table 32).

Beaverhead County. The top advantage, as observed from residents of the Beaverhead County sample, was purely economic in nature. Eighty-two percent of Beaverhead County respondents cited economic benefits of some type such as new dollars to the community, jobs, profits for local business, etc., as the top advantage of tourism (Table 31). Overcrowding at attractions, wear and tear on roads/infrastructure stress, and abuse of land/hunting pressure were the top disadvantages cited by Beaverhead County respondents (Table 32)

**Table 31:** The Top Advantage of Increased Tourism in the Community

<b>Top Advantage:</b>	<b>Statewide %</b>	<b>Beaverhead County %</b>
Overall economic benefit: dollars, jobs, profit for business.	<b>85%</b>	<b>82%</b>
No advantage.	8%	12%
Chance to "show off" Montana lifestyle.	2%	1%
Off-set taxes.	1%	1%
Learning about other cultures/meeting new people.	1%	--
Enhancing recreation opportunities.	1%	--
Promotes community growth/diversity.	1%	4%
Increased awareness to preserve open & wild space.	1%	--
Attracts new business ideas.	1%	--
Clean Industry.	1%	--
Promotes community cleanliness.	--	1%

**The primary perceived advantage to increased tourism in Beaverhead County is \$\$\$.**

**Table 32:** The Top Disadvantage of Increased Tourism in the Community

<b>Main Disadvantage:</b>	<b>Statewide %</b>	<b>Beaverhead County %</b>
Wear & tear on roads; increased traffic & congestion/infrastructure stress	<b>25%</b>	15%
Overcrowding at attractions	17%	<b>22%</b>
Drives prices up, increased cost of living, more taxes	10%	6%
Abuse of land; pressure on resources/hunting pressure	8%	10%
No disadvantage	8%	4%
Migration, unwanted advise from visitors	6%	12%
No sales tax/tourists don't fully pay for services they use	6%	7%
Less security and safety, loss of way of life, decreasing quality of life	4%	2%
Illegal activity (drugs, crime, etc) loss of peace	3%	--
Litter/pollution	3%	3%
Commercialism/Development/Growth	2%	5%
Low paying jobs	2%	2%
Lack of services, accommodations, amenities, etc	2%	2%

**In planning for tourism in Beaverhead County, these top four concerns should be addressed:**

- 1. Overcrowding.**
- 2. Road Congestion and maintenance.**
- 3. Migration of nonresident visitors.**
- 4. Abuse of land.**

## BEAVERHEAD COUNTY SPECIFIC QUESTIONS

The Beaverhead County Community Tourism Assessment Committee (CTAP) was given the opportunity to include questions specific to Beaverhead County in the questionnaire. The content of these questions was decided during the first community meeting for the CTAP process. The following section of the report addresses these questions and other community-specific information.

### Activities and Resources to be Promoted to Tourists

The first question posed by the CTAP committee in Beaverhead County related to residents' opinions about what tourism assets should or should not be promoted to visitors. Residents were asked to respond on a five-point scale their feelings as to whether specific county recreational assets should be promoted to out-of-town visitors.

Of the items listed, visiting museums and visiting ghost towns and other historic sites received the highest votes for tourism promotion. All other resources and activities were rated above the mean of the scale for promotion potential with the exception of ATV use, which had the lowest average rating of all resources and activities (Table 33).

**Table 33:** Activities and Resources which should be promoted to tourists in Beaverhead County

Activity or Resource	Beaverhead County Mean*
Visiting museums	4.44
Visiting ghost towns & other historic sites	4.44
Cross-country skiing	3.79
Hiking and backpacking	3.76
Wildlife viewing	3.71
Camping	3.70
Scenic driving	3.66
Ranch recreation	3.63
Backcountry experiences	3.62
Fishing	3.34
Snowmobiling	3.22
Hunting	3.16
ATV use	2.37

\*Average based on a scale of 1 (should not be promoted) to 5 (an excellent opportunity for promotion).

**Promote historical assets of Beaverhead County.**

**Promote outdoor activities in Beaverhead county**

**There is substantial opposition to promoting ATV use by visitors in Beaverhead County.**

## Resident Concerns About Adverse Impacts of Tourists

Residents were asked to complete the following statement: "I am MOST concerned that tourists may adversely affect \_\_\_\_\_ (fill in the blank) \_\_\_\_\_ in Beaverhead County." A range of respondent concerns were identified. Residents' top concerns about the potential adverse impacts that tourists may cause are found in Table 34 below. For a complete list of concerns, see Appendix C.

**Table 34:** Residents' concerns about potential adverse impacts of tourists in Beaverhead County

Concern	Beaverhead County %
Quality of life, safety, way of life	31%
Hunting and fishing	23%
Access to land, land use, wild lands	12%
Property prices, cost of living	9%
Traffic	4%
Community growth	3%
Spread of weeds	3%

**Residents should have a voice in how tourism is developed so they will feel less like it is adversely affecting their quality of life.**

## Strengths and Weaknesses of Beaverhead County as a Tourism Destination.

Residents' were asked to identify the top strengths and the top weaknesses of Beaverhead County as a tourism destination. These are listed in Table 35 and Table 36 below. For a complete list of strengths and weaknesses cited by respondents, see Appendix C.

**Table 35:** Strengths of Beaverhead County as a tourism destination

Strengths	Percent
Outdoors, natural areas, recreational opportunities, scenery, open spaces, wildlife	68%
Museums, historical points	12%
Friendly people	8%
Location and climate	3%
No strength	2%
Sparse population	2%
Western atmosphere	2%

**Residents are very positive that the natural resource base of Beaverhead County is its greatest tourism strength.**

**Table 36:** Weaknesses of Beaverhead County as a tourism destination

Weaknesses	Percent
Lack of good restaurants, lack of shopping	13%
Lack overnight accommodations, services, facilities	11%
Community appearance	9%
Isolated, far from a major city	8%
Condition of roads	8%
No weaknesses	7%
Lack of development, community planning	6%

**Additional hospitality related businesses may be needed to meet the need for increased tourism.**

**GENERAL COMMENTS**

Respondents were given an opportunity and space at the end of the survey form to include their own thoughts and comments. About fifty residents took the time to provide additional comments related to this subject. Following is a summary of the comments received. Table 37 below includes the most commonly occurring themes among the comments. For a full list of individual statewide comments, see Appendix B. For a full list of individual Beaverhead County comments, see Appendix C.

**Table 37:** General Comments

	Statewide* %	Beaverhead County** %
Need a sales tax/resort tax	17%	7%
Montana has been or will be damaged by outside influences	10%	7%
Don't need minimum wage jobs	10%	11%
Support increased tourism/good economic boost	7%	2%
Tourism industry doesn't maintain quality of life	6%	--
Don't support tourism-based economy/increased tourism	5%	7%
Tourism must be well managed/planned	2%	--
Need more industries/balance among industries/protect mining, logging, etc.	1%	19%
Need improved/more rest areas	1%	--
Don't support migration to Montana by nonresidents	--	7%

**Don't stress tourism development to the exclusion of other economic development strategies.**

\* represent comments made by 49 respondents.  
 \*\* represent comments made by 50 respondents

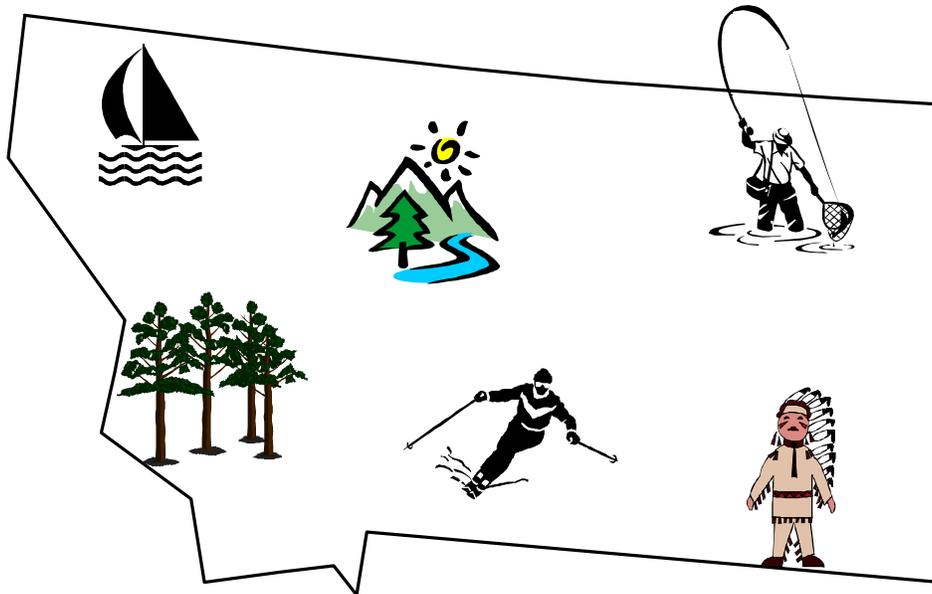
# What do you think?

## Tourism, Beaverhead County, and Montana

Your opinion counts...

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Please place your completed survey in the envelope provided and drop it in the mail to:  
ITRR, S.C. 443, The University of Montana, Missoula, MT 59812  
Phone: 406-243-5686

Fall, 1998

**Part 1:** Please indicate your level of agreement or disagreement with each of the following statements:

**Beaverhead County**

1.	If I had to move away from Beaverhead County, I would be very sorry to leave.	4	3	2	1
2.	I'd rather live in Beaverhead County than anywhere else.	4	3	2	1
3.	I think the future of Beaverhead County looks bright.	4	3	2	1
4.	Beaverhead County is an attractive place to invest in new tourism development.	4	3	2	1
5.	Increased tourism would help Beaverhead County grow in the "right direction".	4	3	2	1
6.	It is important that the residents of Beaverhead County be involved in decisions about tourism.	4	3	2	1
7.	Decisions about how much tourism there should be in Beaverhead County are best left to the private sector.	4	3	2	1
8.	There is adequate undeveloped open space in Beaverhead County.	4	3	2	1
9.	I would support land use regulations to help manage types of future growth in Beaverhead County.	4	3	2	1
10.	Tourism promotion by Montana benefits Beaverhead County economically.	4	3	2	1
11.	I will benefit financially if tourism increases in Beaverhead County.	4	3	2	1
12.	I am concerned about the potential disappearance of open space in Beaverhead County.	4	3	2	1

**Statewide**

13.	I support continued tourism promotion and advertising to out-of-state visitors by the State of Montana.	4	3	2	1
14.	Vacationing in Montana influences too many people to move to Montana.	4	3	2	1
15.	In recent years, the state is becoming overcrowded because of more tourists.	4	3	2	1
16.	The overall benefits of tourism outweigh the negative impacts.	4	3	2	1
17.	Tourists do not pay their fair share for the services they use.	4	3	2	1
18.	If tourism increases in Montana, the overall quality of life for Montana residents will be improved.	4	3	2	1
19.	My access to recreation opportunities is limited due to the presence of out-of-state visitors.	4	3	2	1
20.	Tourism increases opportunities to learn about other people and cultures.	4	3	2	1
21.	Most of the jobs in the tourism industry are low paying	4	3	2	1

22. In your opinion, what is the **top advantage** of increased tourism in Beaverhead County? \_\_\_\_\_  
 \_\_\_\_\_

23. In your opinion, what is the **top disadvantage** of increased tourism in Beaverhead County? \_\_\_\_\_  
 \_\_\_\_\_

**Part 2:** Listed below are some factors that may influence **quality of life in Beaverhead County**. On the *left*, indicate how you would rate the **present condition** of these factors in your county. On the *right*, indicate the **influence** you feel tourism has on these factors.

	<i>CONDITION</i>					<i>TOURISM'S INFLUENCE</i>				
	4	3	2	1	DK	+	=	-	NI	DK
1. Emergency services (police, fire, etc)	4	3	2	1	DK	+	=	-	NI	DK
2. Museums and cultural centers	4	3	2	1	DK	+	=	-	NI	DK
3. Job opportunities	4	3	2	1	DK	+	=	-	NI	DK
4. Education system	4	3	2	1	DK	+	=	-	NI	DK
5. Cost of living	4	3	2	1	DK	+	=	-	NI	DK
6. Safety from crime	4	3	2	1	DK	+	=	-	NI	DK
7. Condition of roads and highways	4	3	2	1	DK	+	=	-	NI	DK
8. Infrastructure (water, sewer, etc.)	4	3	2	1	DK	+	=	-	NI	DK
9. Traffic congestion	4	3	2	1	DK	+	=	-	NI	DK
10. Overall community livability	4	3	2	1	DK	+	=	-	NI	DK
11. Parks and recreation areas	4	3	2	1	DK	+	=	-	NI	DK
12. Overall cleanliness & appearance	4	3	2	1	DK	+	=	-	NI	DK

13. Beaverhead County offers a number of activities and resources which could be promoted to tourists. Which activities present opportunities for tourism promotion in Beaverhead County? (1 = activity should not be promoted, 5 = activity presents an excellent opportunity for tourism promotion)

	Should not be promoted					Excellent opportunity for tourism promotion				
	1	2	3	4	5	1	2	3	4	5
a. Visiting museums	1	2	3	4	5					
b. Visiting ghost towns & other historic sites	1	2	3	4	5					
c. Fishing	1	2	3	4	5					
d. Hunting	1	2	3	4	5					
e. ATV use	1	2	3	4	5					
f. Ranch recreation (i.e., dude ranching)	1	2	3	4	5					
g. Scenic driving	1	2	3	4	5					
h. Hiking/backpacking	1	2	3	4	5					
i. Camping	1	2	3	4	5					
j. Snowmobiling	1	2	3	4	5					
k. Backcountry experiences	1	2	3	4	5					
l. Cross-country skiing	1	2	3	4	5					
m. Wildlife viewing	1	2	3	4	5					
n. Other _____	1	2	3	4	5					

(please specify)

14. I am MOST concerned that tourist use may adversely affect \_\_\_\_\_ in Beaverhead County.

*Fill in the blank*

15. In your opinion, what is the **top strength** of Beaverhead County as a tourism destination? \_\_\_\_\_

16. In your opinion, what is the **top weakness** of Beaverhead County as a tourism destination? \_\_\_\_\_

**Part 3:**

1. In your opinion, how is the population changing in Beaverhead County?
  - Growing
  - Decreasing
  - Not changing
- 1a. If you feel the population in your county is changing, is it changing...
  - Too fast
  - About right
  - Too slow
2. Which of the following statements best describes the frequency of **your** day-to-day contact with tourists?
  - Regular
  - Somewhat frequent
  - Infrequent
  - Almost never
3. Which of the following statements best describes **your** behavior toward tourists in Beaverhead County?
  - Make them feel welcome
  - No specific reaction
  - Avoid them
4. How dependent is your income on tourists/tourism?  Very dependent
  - Somewhat dependent
  - Not at all dependent
5. Compared to other industries, how important a role do you think tourism should have in Beaverhead County's economy?
  - A minor role
  - A role equal to other industries
  - A dominant role
6. In your opinion, which of the following provide the best opportunities for future economic development in Beaverhead County? Please rank 1 through 8, with 1 being **the best** opportunity.
  - \_\_\_\_\_ Mining
  - \_\_\_\_\_ Agriculture/Agribusiness
  - \_\_\_\_\_ Tourism/recreation
  - \_\_\_\_\_ Wood products
  - \_\_\_\_\_ Manufacturing
  - \_\_\_\_\_ Retail & wholesale trade
  - \_\_\_\_\_ Services (health, business)
  - \_\_\_\_\_ Other\_\_\_\_\_
7. **Now a few questions about yourself...**
  - a. Do you live in a...
    - Rural area
    - Town under 20,000
    - Town over 20,000
  - b. Were you born in Montana?
    - yes
    - No
  - c. Years lived in Beaverhead Co. \_\_\_\_\_yrs
  - d. Number of years lived in Montana. \_\_\_\_\_yrs
  - e. What is your age? \_\_\_\_\_yrs
  - f. Are you?  Female  Male
  - g. Which of the following best describes your employment status? (Check one)
    - Unemployed  Professional
    - Laborers  Educator
    - Farmer  Manager
    - Farm laborer  Sales
    - Clerical  Retired
    - Armed Services  Craftsman
    - Service Worker  Student
    - Homemaker  Equip. Operator

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**Please include any additional comments.**

**Thank you for your participation.**

## **APPENDIX B: STATEWIDE COMMENTS**

### **Montana Has Been or Will Be Damaged by Outside Influences**

The Californication of Montana has irreparably damaged the quality of life in the once great state of Montana! Flathead Lake and Georgetown Lake (my area) are two prime examples of Californication, a social condition loathed by all Montanans.

If we continue to let tourists visit, move to, and raise our cost of living (housing, land, accessibility to land) we will drive our state into the ground. We are allowing them to make our state into the kind of places they are moving from. We need to open our eyes while we still have time to put a stop to it.

I do not care to see southwest Montana as another Jackson Hole, WY. People will come to Montana no matter what, as this is the last best place!

I operate 2 service businesses for agriculture and a retail business for ag/residential fencing. I spend half to two-thirds of my year away from home, in motels, earning a living. The bed tax is not doing anything for me or the people I work for. Agriculture is dying in my part of Stillwater County due to low to non-existent profits, decreasing availability of opportunities in ag, decreasing affordable land. I know people live off tourism as I do from ag, but increased tourism will destroy what they came to look at. We already have people quarreling over who gets to use the forests, the trails, the water in the lakes and streams, the roads, etc. Just as Yellowstone Park has a limit on what it can handle, so does our state and our people. Just be a landowner during hunting season once to test the limit.

Having agriculture and "space" in many of my past experiences, including childhood, it isn't easy to see recreation and tourism become so much a priority. The changes bring a whole different breed of neighbors.

Tourism-based economies do not promote, protect, or otherwise assist residents (local) in maintaining quality of life. Many examples of tourism playgrounds destroying the ability of local residents to continue to afford to live where they choose are in the west.

I hate to see so many large areas of Montana being bought by extremely wealthy celebrities.

### **Montana Needs a Sales Tax/Community Needs a Resort Tax**

State tax would also help, especially during tourist season so that everybody would contribute to Montana's economic growth, not just Montanans!

I feel we need a small sales tax or other way for tourists to contribute to Montana's economy. The property owner gets taxed too much.

I think we need to have a sales tax to provide tourists with the opportunity to better support our state financially.

We need a sales tax!

I would very much like to see a tax bill for commodities with guarantees that it will eliminate income tax or reduce property and business taxes.

We have to get more reasonable paying jobs for citizens. We must not let our education system go downhill. We need to lower (set) reasonable speed limits. We need to improve highway 93 - end to end. We need to reduce property taxes. Ness a sales tax for nonresidents.

Tourism provides a good economic boost to Montana. Tourists must pay their fair share of Montana's expenses for the services they use, and property owners need the burden shifted off. We need to replace the property tax with a sales tax.

Tourism can be a good thing if it isn't forgotten that when tourist season is over, it is the people that live here that support the businesses. Don't increase costs, add taxes (i.e. bed tax and resort tax) because wages here often do not meet the cost of living. In other words, don't screw the people that support you when the tourists go home.

Montana needs a sales tax. Tourists really get off the hook without it.

I feel our best source of tourism income could be in the form of a sales tax. I would only be in favor of such a tax if there were adjustments made in the property tax structure. A sales tax would provide income from people traveling into the state and using our resources - highways, rest areas, etc. Also, it would insure that everyone carried a share of the burden.

### **Support Increased Tourism; Tourism is Good Economic Boost**

Tourism is a great industry and one which promotes the natural beauty of the state. However, it is not the total answer because tourism jobs are typically low paying, seasonal, and transitional. Our biggest economic hurdle is developing the types of business and industry that provides better pay.

I love to see tourists come and spend their money, but do not want them to stay. The out-of-staters can afford to buy Montana, but Montanans can't!

I am very supportive of promoting increased tourism. I sincerely hope that it does not impede our progress in other areas, like decreasing crime and reforming education.

Tourism provides a good economic boost to Montana. Tourists must pay their fair share of Montana's expenses for the services they use, and property owners need the burden shifted off. We need to replace the property tax with a sales tax.

Tourism overcrowds roads that are already too heavily trafficked by local people and residents. However, tourism brings money into our town.

### **Montanans Don't Need Minimum Wage Jobs/Tourism Only Provides Minimum Wage Jobs**

Tourism is a great industry and one which promotes the natural beauty of the state. However, it is not the total answer because tourism jobs are typically low paying, seasonal, and transitional. Our biggest economic hurdle is developing the types of business and industry that provides better pay.

Job opportunities from increased tourism are at the very bottom of the local pay scale, and the last time I noticed Montana's wages are at the very bottom nationwide. These are not even minimalist survival wages that you are discussing; why bother?

We have to get more reasonable paying jobs for citizens. We must not let our education system go downhill. We need to lower (set) reasonable speed limits. We need to improve highway 93 - end to end. We need to reduce property taxes. Ness a sales tax for nonresidents.

Montana is still about 40 years behind other places - no industries. We pay to educate children then they leave to other state to make a living. Pretty sad in this area! Tourism is fine but only for the tourists - only minimum wages for us!

Tourism brings minimum wage jobs to the state. High paying jobs provided by industry such as mining and wood products are being driven out by out-of-state environmentalists. Montana is 50<sup>th</sup> - lowest wages in the US. Do we really need more minimum wage jobs?

We need to concentrate on increasing our higher paying (non-minimum wage) jobs, not the tourism minimum wage jobs. Our education system needs to be helped by tourism dollars.

### **Tourism Industry Doesn't Maintain Quality of Life**

While I think tourism offers great opportunity for economic development, I think increased tourism can negatively impact quality of life for Montana residents.

I operate 2 service businesses for agriculture and a retail business for ag/residential fencing. I spend half to two-thirds of my year away from home, in motels, earning a living. The bed tax is not doing anything for me or the people I work for. Agriculture is dying in my part of Stillwater County due to low to non-existent profits, decreasing availability of opportunities in ag, decreasing affordable land. I know people live off tourism as I do from ag, but increased tourism will destroy what they came to look at. We already have people quarreling over who gets to use the forests, the trails, the water in the lakes and streams, the roads, etc. Just as Yellowstone Park has a limit on what it can handle, so does our state and our people. Just be a landowner during hunting season once to test the limit.

Tourism-based economies do not promote, protect, or otherwise assist residents (local) in maintaining quality of life. Many examples of tourism playgrounds destroying the ability of local residents to continue to afford to live where they choose are in the west.

Growth has slowed recently, however, I think the more rapid growth experienced in the early 90s was too fast and the average Missoula resident wasn't the one who benefited. I think anyone with a valid Montana drivers license (or proof of residency) should not have to pay the bed tax.

### **Montana Needs More Industries/Balance Among Industries**

Montana needs to maintain a fair, even balance between industries. We depend on our natural resources to survive and do a good job of preserving them.

Montana is still about 40 years behind other places - no industries. We pay to educate children then they leave to other state to make a living. Pretty sad in this area! Tourism is fine but only for the tourists - only minimum wages for us!

Tourism is a great industry and one which promotes the natural beauty of the state. However, it is not the total answer because tourism jobs are typically low paying, seasonal, and transitional. Our biggest economic hurdle is developing the types of business and industry that provides better pay.

### **Don't Support Tourism-Based Economy or Increased Tourism**

Agriculture, mining, and timber have been Montana's three major industries. There are too many tree huggers and other uninformed people in Montana making decisions that have hurt Montana's economy. It seems to me the money that tourists bring to our state is like a pea in a box car as to what agriculture, mining, and timber would bring to our state. Let's get back to what made Montana.

As far as tourists are concerned, they can come see and go home. We don't need the lugs out of California or the release centers. They all have motor homes. They don't spend any money here. I have heard they will go back into Idaho and buy gas there because it is cheaper.

I've traveled all over the USA and several countries during my military career. I don't believe we need to sell Montana tourism. Many folks are already aware of the vacation opportunities in our state. I'd rather see funds used for preserving land, managing wildlife resources, and providing opportunities for state residents.

I really hate to see a community or a country strictly rely on tourists for their income. It's not a reliable source. Also, businesses relying on tourists often neglect other important changes needed to be done because it will affect the amount of tourists they will get.

### **Miscellaneous**

I'm very happy to see the The University of Montana is in the fore-front of studies to help the counties and state adjust to increased tourism and development.

I lived in Golden, Colorado, and my family is from Montana so it was a second home. I can't tell you how spectacular the Montana TV promotions were! I even taped them to watch repeatedly. Thank you!

Montana has recently been the home of very high profile criminals. This is not what Montana is all about. Montana is the "Big Sky" state and in Montana is the only place you can see skies like ours. We're very lucky to live here.

Montana continues to be a special place. I think it is somewhat difficult to share her as our open spaces and recreation areas become more crowded. While tourism is a clean industry (and all resource-based industries have a very difficult time making it here) we would be wise to study its affects and decide ahead of time where the limit is on the amount of people we want to manage.

We do very little to encourage visitation by not keeping up good highways. We do not employ proper speed limits - we seem to be stuck on this night time entrapment garbage! Let's try 75 mph on freeways, 65 mph on primary roads, and 55 mph on secondary, etc., day or night. Then people will know where they stand (especially tourists). Trucks should move along with traffic and not become a roadblock. Construction on roads and highways shows lack of planning or not willing to change the plan when it is obvious that it was a bad plan. I understand certain slow

speeds when workers are there. But what about night time, weekends, and holidays? All they use these for then is to write tickets!

The Conrad area is trying to promote tourism by attempting to get grants for a minute-man missile shell to put in the park. They also are needing signs to put on the Interstate to attract tourists to exit and tour the exhibit. This may be a great area to help!

I am retired from the Dept. of Highways. I own a small hay farm and winter-pastures horses. I make and sell artistic wood bowls. I do not like our state government catering to outfitters or their lack of consideration of the resident sportsman.

We need something to improve the economy of Eastern Montana. I mean east of Great Falls to the North Dakota border. Every news, TV, and paper caters to the western part of the state.

More effort should be expended in developing the recreational value of the Fort Peck Reservoir.

I travel all over the US in my motorhome and the only complaint I hear about Montana from tourists is the lack of rest areas.

Too much of the bed-tax money is used to promote ski areas; we want more development of our historic sites. We also want our tour guide to be updated, errors corrected, and more graphics. It has looked the same every year and lacks a professional touch.

I was raised in Branson, Missouri. Tourism was its livelihood. Now it is overcrowded and a terrible place to live. Tourism should be very well managed in a state!

Although I answered the questions of the bed tax, I am strongly against it. If I lived out of state and was planning a visit to Yellowstone Park, I would route myself away from states that have a bed tax. If this was impossible, I would plan to visit someplace else.

I hope you place more emphasis on the opinion of native Montanans. I think they should have a greater say than out-of-staters like myself. Natives have a lot more invested and more at stake than some "native wanabee" that sold their home in Chicago or New York to move "west".

I am thinking of preparing a "road show" on service and hospitality for training of front-line people. Is there a need in your estimation? We see one in Great Falls (I was a speaker in the old Superhost program). I'd like to participate in a program to make the first rest area at all border crossing exceptional like Mississippi's. Montana's are the worst. We could increase the stays of visitors I believe with this investment of "first impression".

If the bed tax is now spent on only the items indicated, perhaps some should be allocated to roads that the tourists use.

Tourism is a wonderful opportunity for communities, if they are prepared for and take advantage of it. Tourists must understand and appreciate what they see and experience in Montana. We must provide interpretive information and learning activities.

## **APPENDIX C: BEAVERHEAD COUNTY RESPONSES AND COMMENTS**

### **ADVANTAGES OF INCREASED TOURISM IN BEAVERHEAD COUNTY**

- Overall economic benefit - dollars, jobs, etc./profit for local businesses
- No advantage
- Chance to "show off" Montana lifestyle/exposure
- Off-sets taxes
- Promotes community growth/diversity
- Promotes community cleanliness

### **DISADVANTAGES OF INCREASED TOURISM IN BEAVERHEAD COUNTY**

- Overcrowding at attractions
- Wear & tear on roads/increased traffic/congestion/infrastructure stress
- No sales tax/Tourists don't fully pay for services they use
- Migration; unwanted "life management" advice from nonresidents
- No disadvantage
- No regard for "local customs" by tourists/attracts undesirable people
- Lack of services, accommodations, amenities, facilities, shopping
- Litter/pollution
- Low paying jobs
- Commercialism/development/growth
- Less security and safety; loss of way of life/decreasing quality of life
- Abuse of land; pressure on natural resources/hunting pressure
- Drives prices up (in general, real estate, etc.)/increased cost of living, higher taxes, more resort-type taxes
- Community/land use changes; loss of land-owner rights
- Having to share Montana
- Only rich will profit
- Lack of other industry to keep community going in tourism off-season
- Loss of local government control/more state government control
- Spread of noxious weeds

### **ADVERSE IMPACTS OF INCREASED TOURISM IN BEAVERHEAD COUNTY**

- Hunting/fishing; fish/game
- Access to lands, land use, wildlands
- Beaverhead River
- Property Prices/Cost of Living
- Privacy
- Ranching
- Quality of life/safety/way of life
- Overcrowding
- More government control over residents
- Spread of weeds
- Traffic
- Type of people in community (i.e. more environmentalists)

- Community growth
- Balance
- Jobs
- Infrastructure

### **STRENGTHS OF BEAVERHEAD COUNTY AS A TOURIST DESTINATION**

- Outdoors, natural areas, recreational opportunities, scenery, open space, wildlife
- Location and climate
- No strength
- Museums, historical points
- Sparse population
- Western atmosphere
- Friendly people
- Isolation
- Rodeo
- Safe
- Fair

### **WEAKNESSES OF BEAVERHEAD COUNTY AS A TOURIST DESTINATION**

- No weakness
- Attitude of locals
- Lack of overnight accommodations, services, facilities
- Condition of roads
- Lack of coordinated promotion
- Isolated; far from major city/resort area
- Over-exploitation by hunters and fisherpersons/overcrowding by outfitters
- Lack of cultural attractions, museums
- Fuel prices
- Community appearance
- Lack of development/community planning/zoning
- Low paying jobs
- Lack of entertainment (evening)
- Bars and casinos
- Land access changes
- Weather
- Too few activity opportunities/parks and recreation
- Lack of good restaurants, lack of shopping
- Lack of convention center
- Lack of community airport
- Fragility of ecosystem

### **BEAVERHEAD COUNTY RESIDENT COMMENTS**

#### **Montana Needs a Sales Tax**

Dillon is missing a golden opportunity to increase revenue for the city. With a small city tax from Memorial Day to Labor Day, Dillon could generate a substantial amount of money to be used toward street improvement in the city.

All of Montana is missing a golden opportunity by not having a sales tax to profit from tourism.

We need better, stricter zoning. Too many junky trailers, sheds, and junk parked on lots next to nice places. We need to promote a sales tax so the people who are using the services of our area can help pay for improvement and maintenance of our infrastructure. Basic necessities such as food and drugs should be excluded.

### **Need More Industries/Balance Among Industries/Protect Agriculture, Mining, Logging, etc.**

The foundation of this state used to be agriculture, logging, and mining. Because of tourism and new people moving to Montana we lost our foundation. Now we have become dependent on tourism. Montana is no longer unique. What made us unique was agriculture, mining, and logging - not tourism.

Ranching, farming, logging, and mining have been the backbone of the economy of Beaverhead County for over 100 years. As long as they prospered, Beaverhead County prospered. Now we are being over-run by arrogant know-it-all ecofreaks who want us to take minimum wage jobs flipping hamburgers for tourists. We can't afford to become a playground for the rich, and we won't tolerate seeing our children's future job prospects reduced to becoming a servant class to wealthy outsiders.

We need to concentrate on helping local, long-time residents to be able to make a living here without depending on visitors and out-of-state California-people/tree huggers moving here and trying to change our way of life.

I don't think there is (or should be) any "best" opportunity for future economic development in Beaverhead County or Montana, but diversified, balanced, and compatible growth.

If Beaverhead County would support a big company (mining, manufacturing, etc.) the economic health would improve without having the area explode with too many people. The state and county over-taxing and over-regulating is what is hurting everyone. If you would just work on these problems, you won't have to worry about tourism, it will take care of itself.

Stop the free trade bull crap on our borders. We don't need China, Canada, Mexico, and other countries flooding our lumber, cattle, grain, minerals, manufacturing markets. We need these good-paying jobs to support our county and state. Tourism doesn't make for good jobs - only minimum wage jobs. Good jobs mean a hell of a lot to the economy of Beaverhead Co.

Montana growth should be based on industrial and agricultural production. Don't make Montana a zoo. Since the swing from production to tourism in our Montana, the pre capita income has gone down to #50. Nobody in our government seems to make the connection. Industry and agriculture needs help - not tourism.

Agriculture is and has always been the leading business in Beaverhead County.

### **Don't Need Minimum Wage Jobs**

Tourism generally provides low-paying jobs (except for owners) and attracts retirees to town, which drives up property taxes and decreases support for schools. We need good paying jobs in industry.

Ranching, farming, logging, and mining have been the backbone of the economy of Beaverhead County for over 100 years. As long as they prospered, Beaverhead County prospered. Now we are being over-run by arrogant know-it-all ecofreaks who want us to take minimum wage jobs flipping hamburgers for tourists. We can't afford to become a playground for the rich, and we won't tolerate seeing our children's future job prospects reduced to becoming a servant class to wealthy outsiders.

We need to concentrate on helping local, long-time residents to be able to make a living here without depending on visitors and out-of-state California-people/tree huggers moving here and trying to change our way of life.

I don't wish to see further economic development in Beaverhead County. I think it's just right the way it is. You bring in more industry, you have to bring in more people to run that industry. Usually, the pay scale is so low that equates to a lower class of people. I don't want to sound elitist, but it's unfortunately true. Plus service industry people bring their inherent problems with them (i.e. crime, drugs). So in my opinion more people equates to more trailers, fast food restaurants, drugs, crimes, teenage pregnancy, etc. In closing, tourism provides some positive things but we don't need more of it. I say leave the status quo as it is!!

Stop the free trade bull crap on our borders. We don't need China, Canada, Mexico, and other countries flooding our lumber, cattle, grain, minerals, manufacturing markets. We need these good-paying jobs to support our county and state. Tourism doesn't make for good jobs - only minimum wage jobs. Good jobs mean a hell of a lot to the economy of Beaverhead Co.

### **Don't Support Tourism-based Economy/Increased Tourism**

The foundation of this state used to be agriculture, logging, and mining. Because of tourism and new people moving to Montana we lost our foundation. Now we have become dependent on tourism. Montana is no longer unique. What made us unique was agriculture, mining, and logging - not tourism.

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### **Montana Has Been or Will Be Damaged by Outside Influences**

This was the last best place. I'm glad I at least saw the last of the good old days.

Hunters and fishermen are \_\_\_\_\_ on my vacation. Four-wheel vehicles are \_\_\_\_\_ our roads, destroying our environment. There are just too many people - necessitates too many regulations. I like tourists to bring money, leave it, and go home \_\_\_\_\_.

Quit advertising fishing and hunting - none left for the people who live here.

Our culture seems hell bent on destroying every last beautiful place in our nation. I've traveled the world and seen countries far, far older than ours and they remain pristine and scenic. We will destroy all the beauty left anywhere is we continue to same road other states have. Why not do something different and leave it alone. It will happen anyway.

### **Don't Support Migration to Montana by Nonresidents**

Tourism generally provides low-paying jobs (except for owners) and attracts retirees to town, which drives up property taxes and decreases support for schools. We need good paying jobs in industry.

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Tourism will cause more people to desire to move to Montana to enjoy this way of life. They don't realize that as they do so, they are bringing with them the very thing that they left the cities for in the first place!

We think tourism is good - let them visit, then go home. We don't need anymore out-of-staters trying to run our state, telling us what to do, and bringing their problems with them. Stop trying to change us!

### **Other/Miscellaneous**

I am inclined toward tourism that is not detrimental to the environment and that protects our natural resources so that those who live here (and pay taxes here!) would be able to enjoy them.

I have always tried to be progressive in my thinking and have been a strong supporter of the scenic byway.

Our shopping is SO limited. Many people from Idaho through Beaverhead County drive to Butte or Bozeman to shop. We just had a new Safeway, but a Walmart would be nice!!

Do not want Dillon to become another Jackson Hole, Wyoming.

Would like to have a county bus for seniors at least once a week. City has one that I pay taxes for. However, I am not able to use it as I live in the county.

Most tourists treat our outdoors better than many of our locals do. Noxious weeds are something that need to be kept out of the Beaverhead. Just look at how the knapweed has taken over in the Bitterroot Valley and the land owners do very little to control it on their own property.

I would really like to see Beaverhead County, and especially Dillon, start planning for the future and for more tourists and residents to make a home in this county. We can not stop progress, but the more we plan and prepare, the more enjoyable it will be for everyone. It is our best shot at preserving what we love about Beaverhead County.

Dillon Community does not value the positive impact the college has on the town. The students are not made to feel part of the community. If the town would reach out and make the students feel a part of their town, they would see more of students "giving back".

Having come from Cody, Wyoming, I know tourism helps the economy and growth of a community.

More people would retire here in Montana if the property taxes would be lower! Too high for the jobs in this area.

It's a shame that we have abundant natural resources here and the production of these resources can not be the economic basis of this county. The environmentalists have way too much control here in Beaverhead County. In 25 years, it will all be a National Park here.

Ranching is the real west. Save the ranchers, get the cattle prices up. People will come to our state to see and to be a part of the cattle business. Ranchers could work out a program such as "City Slickers". Cowboys are real people. More movies about our great state.

A great place to live. We need more growth in the towns!