

Deer Lodge County Residents Explore Tourism Potential

Deer Lodge County, MT

The 1998 Montana Community
Tourism Assessment Process

Research Report 63

January 1999

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Funded by the Lodging Facility Use Tax

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Title of Report: Deer Lodge County Residents Explore Tourism Potential

Report Number: Research Report 63

Authors: Al Ellard, Kim McMahon, Norma Nickerson, Rita Black

Month Published: December 1998

EXECUTIVE SUMMARY

Introduction

This report presents information about tourism for Deer Lodge 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 Deer Lodge 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 nonresident travel groups visited Montana. Of those, approximately 1,200,000 (32%) traveled through Deer Lodge 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 Deer Lodge County, nonresident visitors spent about \$4.8 million during 1998, or about \$480 per Deer Lodge County resident.
- While in Montana, visitors to Deer Lodge County reported that the best source of travel information was from persons in motels, restaurants, gas stations, etc.
- Almost half of visitors to Deer Lodge County were in Montana for vacation/recreation/pleasure.
- Primary attractions to Montana for travelers to Deer Lodge County were Glacier National Park, Yellowstone National Park, and the mountains.
- Primary recreation activities of Montana visitors to Deer Lodge County included camping in developed areas, watching wildlife, nature photography, and visiting historic & interpretive sites.
- Visitors to Deer Lodge County spent most of their money on gas & oil, restaurants & bars, and lodging. Visitors spent as much for retail purchases as for lodgings.

RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:

- Respondents from Deer Lodge County have been in their county and Montana longer than the statewide sample.
- Over two-thirds of the county respondents were native Montanans.
- Deer Lodge County respondents believe that tourism/recreation, followed by retail & wholesale trade offer the best potential for economic development for Deer Lodge County.
- The majority of Deer Lodge County residents do not feel that they are economically dependent on tourists.
- Both Deer Lodge County residents and statewide respondents have a strong attachment to their community, and are concerned about the future of their community.
- Fourty-six percent of Deer Lodge County residents feel their community population is shrinking.
- Deer Lodge County residents feel the quality of their community life could be improved by improving job opportunities, highways & roads, and cost of living.
- Deer Lodge County residents feel that tourists have a negative impact on the traffic congestion, the condition of roads & highways, safety from crime, and cost of living.
- Deer Lodge 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 life in Montana will be improved if tourism increases.
- Eighty-two percent of Deer Lodge County residents would support regulations to control the type of future development in their community.
- Deer Lodge County residents think there is adequate undeveloped open space but are concerned about the potential loss of open space.
- Deer Lodge 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 Deer Lodge County while overcrowding at attractions, migration to the state, and wear & tear on roads & infrastructure were seen as leading disadvantages.

CONCERNS OF DEER LODGE COUNTY RESIDENTS:

- Residents are generally opposed to intensive development of Georgetown Lake and the Lake Miller/Mount Haggin area.
- Residents feel that downhill and cross country skiing, the smelter hill & history, the Highway 1 entrance corridor, Arts in the Park, and sporting events should be targets for intensive tourism development/promotion.
- Leading recommendations for getting travelers to exit I-90 included:
 1. Improved advertising in general.
 2. Better signage on I-90 and local Highways.
 3. Implementation of a 1-800 phone number at the Chamber of Commerce.
 4. More shopping opportunities.
 5. More overnight accommodations.

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INTRODUCTION

This report is intended to provide a comprehensive profile of current visitors and resident attitudes about tourism in Deer Lodge 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 Deer Lodge 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 Community, 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 Deer Lodge 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 Deer Lodge County visitors, a profile of visitors was developed from the subset of surveys that represented nonresident travelers passing through the County. Both statewide and Deer Lodge 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 Deer Lodge 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 resident opinions toward tourism in Deer Lodge County and Montana.

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

SECTION I

Date 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.

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 Reports 51¹ and 52².) To apply this data to specific communities, visitors were identified by travel routes indicated on the questionnaire map. A sample of 1674 respondents were identified as having traveled through Deer Lodge County. The statewide sample included all travelers. Because this study represented nonresident travel, none of the data included Montana residents visiting Deer Lodge 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 | Deer Lodge County |
|--|-----------|----------------------|
| Nonresident groups contacted: | 12,941 | |
| Usable nonresident travel questionnaires returned: | 5,800 | |
| Nonresident Travel Study response rate: | 45% | |
| Sample size of nonresident travel groups: | | 1674 |
| Percent of all nonresident travel groups: | 100% | 13% |

Source: ITRR

¹ 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.**

² 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.**

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 1998³. During the entire year, it was estimated that 13% of those groups passed through Deer Lodge County. Of those visitor groups that traveled through Deer Lodge County, 3 percent were captured for at least one night. These travel group characteristics were obtained from visitor groups who spent at least one night in Deer Lodge County.

While ITRR nonresident travel data was collected in 1996, visitor characteristics do not change much in a five-year time period. Therefore, characteristics of visitors to Deer Lodge County can be used for numerous years unless new attractions are developed in the area that 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 Deer Lodge 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.

Deer Lodge County. The average group size visiting Deer Lodge County was 2.5, only slightly smaller than the statewide sample. Seventy-six percent of travelers to Deer Lodge County had visited Montana before. Most summer, overnight travelers to Deer Lodge County traveled as families (41%), followed by couples (40%), and individuals traveling alone (13%). Thirty-one percent of males were 65 or older, 25 percent of males were 30-49 years old and another 25 percent were 50-64 years old. Thirty-four percent of females were 50-64 years old and 23 percent were 65 and older. The typical traveler to Deer Lodge County spent 6 nights in the state of Montana and was most likely to spend the night in a private campground (56%).

³ **The total number of travelers is estimated each year, while the profile of visitors is only re-evaluated every few years. Therefore, this report represents 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.**

Table 2: Characteristics of Nonresident Summer Travelers Visiting Montana

| Characteristics: | Statewide | Deer Lodge County* |
|---|------------------|---------------------------|
| Group Type | | |
| Couple | 38% | 40% |
| Family | 34% | 41% |
| Alone | 17% | 13% |
| Friends | 7% | 2% |
| Family & Friends | 3% | 2% |
| Business Associates | 1% | 1% |
| Group or Club | <1% | 3% |
| Group Size | | |
| | 2.6 | 2.5 |
| Males | | |
| 0-17 Years Old | 19% | 14% |
| 18-29 Years Old | 10% | 4% |
| 30-49 Years Old | 31% | 25% |
| 50-64 Years Old | 24% | 25% |
| 65+ Years Old | 16% | 31% |
| Females | | |
| 0-17 Years Old | 18% | 17% |
| 18-29 Years Old | 10% | 7% |
| 30-49 Years Old | 33% | 19% |
| 50-64 Years Old | 25% | 34% |
| 65+ Years Old | 14% | 23% |
| Have visited MT before | | |
| | 75% | 76% |
| Total nights spent in MT | | |
| | 3 | 6 |
| Overnight Accommodations Used While in Montana | | |
| Home of friend, relative % | 21% | 23% |
| Hotel, motel % | 59% | 25% |
| Private campground % | 18% | 56% |
| Public campground % | 16% | 31% |
| Undeveloped camp % | 4% | 3% |
| Other % | 5% | 4% |
| Resort, guest ranch % | 5% | 13% |
| Condominium % | 1% | 1% |

Visitor groups traveling through Deer Lodge County were about equally divided between family groups and couples.

Visitors to Deer Lodge County were far more likely to stay in campground than in hotels & motels.

APPLICATION: Make sure campgrounds are well advertised. Perhaps there are opportunities for additional campground development.

Source: ITRR

* Characteristics of Montana visitors who stayed at least one night in Deer Lodge County

Visitors to the state, as well as to Deer Lodge County, represented a range of states of origin. Table 3 shows the states which were the top five visitor origins. Washington State and California were among the top five for both the statewide sample and the Deer Lodge sample. These visitors accounted for approximately 54 percent of all visitors to Deer Lodge County and 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 Visitors to Montana: Top Five States

| Statewide | Deer Lodge County* |
|------------|--------------------|
| Washington | Washington |
| California | Florida |
| Idaho | California |
| Wyoming | Texas |
| Colorado | Tennessee |

Florida and Texas represent areas in which marketing efforts could be focused to continue drawing visitors to Deer Lodge County.

Source: ITRR

* Characteristics of Montana visitors who stayed at least one night in Deer Lodge 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%), 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).

Deer Lodge County. A third (33%) of visitors to Deer Lodge County were likely to have used none of these information sources prior to travel to Montana. Most frequently used sources of information for travelers to Deer Lodge County included travel guide books (33%), National Park brochures (27%), and AAA (26%) (Table 4). The *most useful* source of pre-trip travel information for visitors to Deer Lodge County included travel guide books (28%), AAA (25%), and the Montana Travel Planner (15%) (Table 5).

While in the state, visitors to Deer Lodge County used information from persons in motels, restaurants, and gas stations (53%), brochure racks (51%), and highway information signs (38%) as their sources of travel information (Table 6). Persons in motels, restaurants and gas stations (27%) were judged to be the *most useful* source of information by visitors to Deer Lodge County while in Montana. Other information deemed to be most useful included brochure racks (22%), and highway information signs (19%) (Table 7).

Table 4: Sources of Information Used *Prior* to Visit to Montana – summer visitors *

| Sources of Information Used for Trip <i>Prior</i> to Visit to Montana: (could be more than one) | Statewide % | Deer Lodge County % |
|--|--------------------|----------------------------|
| None of the Sources | 40 | 33 |
| AAA | 31 | 26 |
| Travel Guide Book | 22 | 33 |
| National Park Brochures | 20 | 27 |
| Montana Travel Planner | 13 | 16 |
| 1-800 State Travel Number | 7 | 8 |
| Chamber or Visitor Bureau | 7 | 15 |
| Information From Private Businesses | 7 | 9 |
| Internet Travel Information | 5 | 3 |
| State Park Brochures | 4 | 6 |
| Regional Travel Number | 1 | 1 |
| Attend a Travel Trade Show | <1 | 1 |

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*

| <i>Most Useful</i> Source of Information Used for Trip <i>Prior</i> to Visit to Montana: | Statewide % | Deer Lodge County % |
|---|--------------------|----------------------------|
| AAA | 39 | 25 |
| Travel Guide Book | 19 | 28 |
| Montana Travel Planner | 12 | 15 |
| National Park Brochures | 11 | 8 |
| Information From Private Businesses | 6 | 6 |
| Chamber or Visitor Bureau | 5 | 7 |
| 1-800 State Travel Number | 4 | 5 |
| Internet Travel Information | 3 | 0 |
| State Park Brochures | 1 | 0 |
| Regional Travel Number | <1 | 0 |
| Attend a Travel Trade Show | <1 | 2 |

Source: ITRR

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

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

| Sources of Information Used for Trip While in Montana: (could be more than one) | Statewide % | Deer Lodge County % |
|---|-------------|---------------------|
| Person in Motel, Restaurant, Gas Station, Etc. | 36 | 53 |
| Highway Information Signs | 35 | 38 |
| Brochure Rack | 33 | 51 |
| Person in Visitor Information Center | 26 | 36 |
| None of the Sources Used | 24 | 14 |
| Other | 18 | 18 |
| Business Billboards | 10 | 4 |
| Computer Touch Screen Info Center | <1 | 0 |

Source: ITRR

*Visitors could choose more than one information source.

Table 7: Most Helpful Source of Information Used While Visitors Were in Montana *

| Most Helpful Source of Information Used for Trip While in Montana: | Statewide % | Deer Lodge County % |
|--|-------------|---------------------|
| Person in Motel, Restaurant, Gas Station, Etc. | 24 | 27 |
| Person in Visitor Information Center | 22 | 17 |
| Highway Information Signs | 19 | 19 |
| Other | 18 | 15 |
| Brochure Rack | 15 | 22 |
| Business Billboards | 2 | 0 |
| Computer Touch Screen Info Center | 0 | 0 |

Source: ITRR

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

Purposes of 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 (77%) indicated vacation/recreation/pleasure as one reason for traveling to Montana. Other popular purposes of travel 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 (49%) were in Montana for vacation/recreation/pleasure. Passing through the state (21%) and visiting friends or relatives (16%) were also stated as primary reasons.

Deer Lodge County. Almost ninety (89%) of visitors to Deer Lodge County were traveling for vacation/recreation/pleasure. Other purposes of travel reported by visitors to Deer Lodge County included visiting family and friends (39%), and passing through (32%). When asked for their *primary* reason for traveling to Montana, visitors to Deer Lodge County indicated vacation/recreation/pleasure (45%), visiting family and friends (24%), and just passing through (31%).

Table 8: Purpose of Trip to Montana by Summer Nonresident Travelers

| Travel Purpose: | Statewide % | | Deer Lodge County* | |
|----------------------|--------------|------------------|--------------------|------------------|
| | All Reasons* | Primary Reason** | All Reasons* | Primary Reason** |
| Vacation | 77 | 49 | 89 | 45 |
| Passing Through | 31 | 21 | 32 | 21 |
| Visit Family/Friends | 31 | 16 | 39 | 24 |
| Business | 10 | 6 | 8 | 3 |
| Recreational | 9 | 1 | 10 | 4 |
| Shopping | | | | |
| Necessity Shopping | 4 | 1 | 10 | 0 |
| Other | 4 | 3 | 1 | 1 |
| Convention/Meeting | 3 | 2 | 3 | 2 |
| Medical | 2 | 1 | 2 | 0 |
| | | 100% | | 100% |

Provide a variety of opportunities to vacationers to capture their interest and attract them to Deer Lodge County.

Source: ITRR

* Visitors could choose more than one reason.

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

Montana's Attractions

Travelers indicating vacation/recreation/pleasure 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%).

Deer Lodge County. Travelers to Deer Lodge County differed very little in regard to the attractions that drew them to visit Montana. Leading attractions to Montana included the mountains (62%), Yellowstone National Park (47%), rivers (44%), Glacier National Park (40%), and lakes (40%). Glacier National Park was also the *primary* attraction to Montana for thirty-five percent of visitors to Deer Lodge County followed by Yellowstone National Park (20%).

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

| Vacation Attraction: | Statewide % | | Deer Lodge County* | |
|----------------------|-----------------------|----------------------|-----------------------|---------------------|
| | Types of Attractions* | Primary Attraction** | Types of Attractions* | Primary Attraction* |
| Mountains | 51 | 12 | 62 | 18 |
| Yellowstone NP. | 39 | 22 | 47 | 20 |
| Rivers | 35 | 1 | 44 | 0 |
| Glacier NP | 31 | 25 | 40 | 35 |
| Open Space | 31 | 6 | 36 | 4 |
| Wildlife | 28 | 2 | 28 | 3 |
| Uncrowded Areas | 27 | 4 | 28 | 3 |
| Lakes | 26 | 1 | 40 | 0 |
| Camping | 19 | 2 | 35 | 7 |
| Friendly People | 18 | 3 | 21 | 1 |
| National Forest | 15 | 1 | 22 | 0 |
| Hiking | 15 | 1 | 16 | 0 |
| Fishing | 14 | 6 | 13 | 2 |
| Historic Sites | 13 | 2 | 25 | 1 |
| Montana History | 11 | 1 | 21 | 3 |
| Indian Culture | 10 | 1 | 7 | 0 |
| Spec. Attraction | 8 | 6 | 13 | 0 |
| Wilderness Area | 8 | 1 | 9 | 0 |
| N Great Plains | 6 | <1 | 5 | 0 |
| Badlands | 6 | 1 | 6 | 0 |
| State Park | 6 | <1 | 9 | 0 |
| Special Event | 4 | 4 | 4 | 3 |
| | | 100% | | 100% |

Vacationers to Deer Lodge County are after the experiences available in Montana's mountains and natural areas. Provide opportunities to achieve these experiences no matter what the travelers age, group type, or desired experience.

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 in 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%) (Table 10).

Deer Lodge County. The most popular recreation activity among visitors to Deer Lodge County was camping in developed areas (61%), followed by wildlife watching (55%), nature photography (46%), visiting historic/interpretive sites (43%), and visiting family/friends (39%) (Table 10).

Table 10: Recreation Activity Participation of Visitors to Montana*

| Recreation Activity: | Statewide | Deer Lodge |
|----------------------------|-----------|-------------|
| | % | County % |
| Wildlife watching | 45 | 55 |
| Visiting family/friends | 34 | 39 |
| Nature photography | 33 | 46 |
| Rec. shopping | 32 | 34 |
| Day hiking | 29 | 34 |
| Hist./Interpretive Sites | 29 | 43 |
| Camping/Developed Area | 28 | 61 |
| Picnicking | 26 | 32 |
| Visiting museums | 21 | 27 |
| Fishing | 15 | 18 |
| Swimming in pools | 14 | 25 |
| Gambling | 10 | 21 |
| Camping in Primitive Areas | 10 | 20 |
| Visit Native Amer. Sites | 10 | 16 |
| Nature Studies | 9 | 13 |
| Special Events/Festivals | 8 | 7 |
| Swimming in natural areas | 7 | 5 |
| River Rafting/Floating | 6 | 5 |
| Golfing | 5 | 9 |

Travelers seek the splendor of nature. Provide this to all types of travelers.

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 Deer Lodge County, economic information is much more inclusive. Table 11 summarizes visitation and expenditures in Montana and Deer Lodge County (which is represented by any group that spent money in Deer Lodge County). ITRR staff estimated that 3,803,000 travel groups visited Montana in 1998. Of those 3.8 million travel groups, approximately 32%, or 1,210,000 drove through Deer Lodge County.

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

Deer Lodge County. Nonresident spending in Deer Lodge County totaled \$4,800,000 in 1998, or .3 percent of all nonresident traveler spending in Montana. Nonresident travelers spent the equivalent of \$480 per capita in the county. *Note: Expenditures were not necessarily made in Deer Lodge County.*

Table 11: Visitation and Expenditures of Nonresident Travelers who Spent Any Time in Deer Lodge County

| Distribution of Expenditures in Sample Area: | Statewide | Deer Lodge County |
|--|-----------------|-------------------|
| Hotel, Lodge, Campgrounds, RV Parks, B&B % | 17% | 14% |
| Auto Rental & Transportation % | 4% | 7% |
| Gasoline, Oil % | 22% | 27% |
| Restaurant, Bar % | 18% | 24% |
| Grocery % | 8% | 10% |
| Retail % | 24% | 14% |
| Miscellaneous Services % | 6% | 5% |
| Total Travel Groups in Sample Area in 1998 | 3,803,000 | 1,210,000 |
| Total Expenditures in Sample Area in 1998 | \$1,519,000,000 | \$4,800,000 |
| Expenditures in Area - Per Capita (1990 US Census) | \$1,740 | \$480 |

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 Deer Lodge 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.

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 37 percent of those Deer Lodge 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 estimates⁴ of age group categories, responses were adjusted to more closely reflect the population of Deer Lodge 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 | Deer Lodge County |
|---------------------------------------|------------------|------------------------------|
| Resident questionnaires sent out: | 1000 | 500 |
| Undeliverables: | 100 | 46 |
| Resident questionnaires returned: | 364 | 170 |
| Resident Opinion Study response rate: | 40% | 37% |
| Female/male response ratio | 40:60 | 56:44 |

⁴ 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".

Residents' Opinions about Montana, Their Community, and Tourism

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 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:

- 1) Respondent Characteristics.
- 2) Resident Attitudes and Opinions about Tourism.
- 3) Deer Lodge 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 Deer Lodge respondents and respondents to the statewide survey which was conducted at the same time. Initially, the study sample of residents did not accurately reflect the population of Deer Lodge County in terms of portion of individuals in each age group category included in the July 1, 1997, census estimates⁵. Therefore, respondent characteristics and responses were adjusted to more closely reflect the population of Deer Lodge 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).

Deer Lodge County. Fifty-six percent of respondents from Deer Lodge County were female. Respondents averaged 51 years of age, and ranged in age from 19 to 91 years. (Table 13).

⁵ **Ibid.**

Table 13: Respondents Age Characteristics

| Age: | Statewide | Deer Lodge County |
|----------------|------------------|------------------------------|
| Average Age | 48 years | 51 years |
| Percent Male | 60% | 44% |
| Percent Female | 40% | 56% |
| Minimum Age | 23 years | 19 years |
| Maximum Age | 89 years | 91 years |

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

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

Deer Lodge County: Over two-thirds (67%) of Deer Lodge County respondents were native-born Montanans (Table 14).

Table 14: Respondents' Residency Characteristics

| Residency: | Statewide | Deer Lodge County |
|-------------------------------------|------------------|------------------------------|
| Born in Montana | 58% | 67% |
| Mean years lived in the county | 24 years | 36 years |
| Mean years lived in Montana | 35 years | 41 years |
| Age (Mean Years) | 48 years | 51 years |
| Percentage of life spent in county | 50% | 68% |
| 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 longer than 40 years, while 31 percent had lived in their county less than 10 years (Table 15).

Deer Lodge County. On average, Deer Lodge County respondents had lived in Deer Lodge County for 36 years or 68% of their lives and had lived in Montana 41 years or 78% of their lives (Table 14). Fifty-nine percent of Deer Lodge County residents had lived in their county longer than 30 years (Table 15).

Table 15: Respondents' Length of County Residency

| Residency: | Statewide % | Deer Lodge County % |
|--------------------|------------------------|------------------------------------|
| Less than 10 years | 31% | 20% |
| 11 to 20 years | 21% | 8% |
| 21 to 30 years | 14% | 14% |
| 31 to 40 years | 17% | 19% |
| 41 to 50 years | 8% | 16% |
| 51 to 60 years | 3% | 10% |
| 61 and Over | 6% | 14% |

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 (Table 16).

Deer Lodge County. Retirees made up the largest percentage of Deer Lodge County respondents (35%), followed by professionals (19%). This was just the opposite of the statewide sample. Managers and self employed persons made up 10% of the respondents (Table 16).



Table 16: Employment Status of Resident Respondents

| Employment Status: | Statewide % | Deer Lodge County % |
|---------------------------|--------------------|----------------------------|
| Unemployed | 1% | 1% |
| Retired | 22% | 35% |
| Student | 2% | 1% |
| Homemaker | 2% | 4% |
| Laborers | 7% | 2% |
| Farmer/Rancher | 3% | 1% |
| Farm/Ranch Laborer | <1% | |
| Clerical | 5% | 4% |
| Armed Forces | 1% | |
| Service Worker | 5% | 6% |
| Professional | 27% | 19% |
| Educator | 6% | 2% |
| Manager/Self Employed | 7% | 10% |
| Sales | 7% | 7% |
| Craftsman | 4% | 4% |

Retirees made up the largest group of respondents from Deer Lodge County, followed by professionals. This was just the opposite of the statewide sample. Additionally, this helps explain why nearly 60 percent of Deer Lodge County resident have lived in the county for more than 30 years and have spent 68 percent of their live in the county.

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

Statewide. Nearly half 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).

Deer Lodge County. Over seventy percent of respondents from Deer Lodge County indicated that they lived in a rural area (Table 17).

Table 17: Respondents' Place of Residence

| Community Type: | Statewide % | Deer Lodge County % |
|-------------------------------|--------------------|----------------------------|
| Community of 20,000 or more | 45% | |
| Community of less than 20,000 | 28% | 28% |
| Rural area | 26% | 72% |

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).

Deer Lodge County. The majority of Deer Lodge County respondents believe that tourism should play a role equal to other industries in the counties economy. Twenty-one percent believe tourism should play a dominant role (Table 18). When asked to rank tourism along with other industry groups according to their economic opportunity for Deer Lodge County, tourism ranked first among all industry groups (Table 19).

Table 18: Role of Tourism in County Economy

| | Statewide % | Deer Lodge County % |
|----------------------------------|----------------|---------------------------|
| A minor role | 33% | 26% |
| A role equal to other industries | 56% | 53% |
| A dominant role | 11% | 21% |

Table 19: Best Opportunity for Economic Development

| Industry | Statewide | | Deer Lodge County | |
|----------------------------------|-----------|-------|----------------------|-------|
| | Rank | Mean* | Rank | Mean* |
| Retail & wholesale trade | 1 | 2.97 | 2 | 3.54 |
| Agriculture/Agribusiness | 2 | 3.25 | 6 | 4.51 |
| Services (health, business, etc) | 3 | 3.42 | 4 | 3.89 |
| Manufacturing | 4 | 3.74 | 3 | 3.57 |
| Tourism/recreation | 5 | 3.88 | 1 | 3.38 |
| Wood products | 6 | 4.83 | 5 | 4.38 |
| Mining | 7 | 5.52 | 7 | 5.04 |

Deer Lodge County respondents believe tourism offers the best opportunity for future economic development in the county.

*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 my community/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)

Deer Lodge County. Almost one third (31%) of Deer Lodge County respondents believe they are dependent on the tourism industry to some extent (Table 20).

Table 20: Job Dependency on Tourism

| Job Dependency | Statewide % | Deer Lodge County % |
|----------------------|-------------|---------------------|
| Very dependent | 3% | 7% |
| Somewhat dependent | 22% | 24% |
| Not at all dependent | 75% | 69% |

Nearly one-third of Deer Lodge County resident feel that their job is, to some degree, dependent on tourism. Since less than two-thirds of Deer Lodge county resident are in the work force, this represents about half of all working residents in the county.

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 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).

Deer Lodge County. Thirty-eight percent of respondents indicated that they have regular or somewhat frequent contact with tourists during their day-to-day activities (Table 21). Over two-thirds (69%) of respondents make an effort to make visitors feel welcome in the community (Table 22).

Table 21: Interactions with Tourists

| Frequency of Interactions | Statewide % | Deer Lodge County % |
|---------------------------|-------------|---------------------|
| Regular | 10% | 12% |
| Somewhat Frequent | 31% | 26% |
| Infrequent | 43% | 42% |
| Almost Never | 16% | 20% |

Just over one-third of Deer Lodge County residents have somewhat to frequent contact with visitors. However, they are very likely to make them feel welcome. It seems the county would benefit from increased contact between residents and visitors.

Table 22: Resident Behavior Toward Tourists

| Behavior | Statewide % | Deer Lodge County % |
|------------------------|-------------|---------------------|
| Make them feel welcome | 59% | 69% |
| No specific reaction | 34% | 27% |
| Try to avoid them | 7% | 4% |

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 were reported earlier in the 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 disagree) through 4 (strongly agree). A response greater than 2.5 indicates agreement. Finally, Table 24 presents the degree to which respondents felt their community was growing and at what rate.

Statewide. 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 its 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. 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 (Table 24).

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.

Deer Lodge County. The Index of Community Attachment for Deer Lodge County was somewhat lower than for the statewide sample, although it was still positive. Like the statewide sample, Deer Lodge County respondents were negative on the item “I think the future of my community looks bright.” Not only was the score lower than the statewide sample, it was at the negative end of the scale (Table 23). Almost half (46%) of respondents felt that the community is decreasing rather than growing (Table 24).

Table 23: Community Attachment Statements

| Statement: | Statewide Mean* | Deer Lodge County Mean* |
|---|------------------------|--------------------------------|
| It is important that the residents of my community be involved in decisions about tourism | 3.43 | 3.38 |
| If I had to move away from my community, I would be very sorry to leave | 3.34 | 3.26 |
| I'd rather live in my community than anywhere else | 3.08 | 3.03 |
| I think the future of my community looks bright | 2.79 | 2.28 |
| Index of Community Attachment | 3.16 | 2.99 |

Deer Lodge County respondents have a negative perspective on the future of their community.

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

Table 24: Perceptions of Community Growth

| Growth Characteristics: | Statewide % | Deer Lodge County % |
|--|------------------------|------------------------------------|
| How is the population changing in your community? | | |
| Growing | 71% | 25% |
| Decreasing | 11% | 46% |
| Not changing | 18% | 29% |
| If changing, is your community changing.. | | |
| Too fast? | 49% | 36% |
| About right? | 46% | 50% |
| Too slow? | 5% | 14% |

Deer Lodge County residents have a strong sense that the community is shrinking.

Factors that Influence 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, and parks & recreation areas were in good to very good condition. In the opinion of the respondents, factors which need improvement included job opportunities, condition of roads & highways, cost of living, and traffic congestion.

Deer Lodge County. Deer Lodge County respondents feel that their community has low traffic congestion, good emergency services, community livability, parks & recreation areas, infrastructure, and safety from crime. Respondents feel that some improvement is needed in cost of living, conditions of highways and roads, and job opportunities in their community (Table 25).

Table 25: The Quality of Community Life

| How would you rate the <i>present condition</i> of... | Statewide Mean* | Deer Lodge County Mean* |
|---|-----------------|-------------------------|
| Emergency services (police, fire, etc) | 3.37 | 3.24 |
| Overall community livability | 3.20 | 3.20 |
| Museums and cultural centers | 3.19 | 2.75 |
| Parks and recreation areas | 3.10 | 3.19 |
| Educational system | 3.07 | 2.97 |
| Overall cleanliness and appearance | 2.96 | 2.74 |
| Infrastructure (water, sewer, etc.) | 2.93 | 3.19 |
| Safety from Crime | 2.91 | 3.15 |
| Traffic congestion | 2.41 | 3.49 |
| Cost of living | 2.36 | 2.60 |
| Condition of roads and highways | 2.35 | 2.37 |
| Job opportunities | 2.08 | 1.56 |

Deer Lodge County respondents feel that their community has low traffic, is safe from crime, has good emergency services, community livability, parks and recreation areas, and infrastructure.

Deer Lodge County respondents feel some improvement is needed in these areas.

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



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. Overall, respondents felt that tourism has had more of a negative than positive impact on these factors of community life. Those items on which respondents thought tourism had a more positive impact include museums and cultural centers, job opportunities, and park & 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).

Deer Lodge County. Deer Lodge County respondents were about equally split on the influence of tourism on the quality of community life items; indicating tourism has a positive influence on five of the items, and a negative influence on seven items. Respondents feel that tourism positively influences emergency services, museums and cultural centers, job opportunities, overall community livability, and parks and recreation areas. On the other hand, respondents felt that tourism has a negative influence on education, cost of living, safety from crime, condition of roads and highways, infrastructure, traffic congestion, and overall community livability (Table 26).

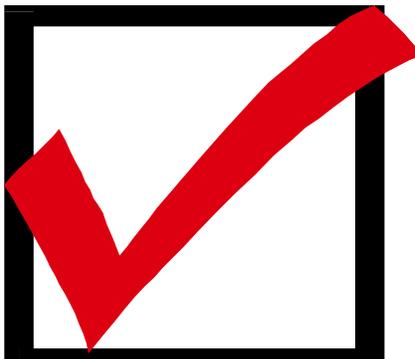


Table 26: Influence of Tourism on Selected Quality of Community Life Factors
The Influence of Tourism on:

| In Percents | | No Influence | Negative nfluence | Positive & Negative | Positive Influence | Don't Know |
|--|-------------------------------|--------------|-------------------|---------------------|--------------------|------------|
| Emergency services (police, fire, etc) | Deer Lodge → 28 | 9 | 28 | 17 | 17 | |
| | <i>Statewide</i> → <i>39*</i> | <i>14</i> | <i>22</i> | <i>11</i> | <i>14</i> | |
| Museums and cultural centers | 14 | 2 | 21 | 54 | 8 | |
| | <i>9</i> | <i>2</i> | <i>16</i> | <i>64</i> | <i>10</i> | |
| Job opportunities | 22 | 15 | 23 | 31 | 10 | |
| | <i>19</i> | <i>12</i> | <i>29</i> | <i>33</i> | <i>7</i> | |
| Educational system | 46 | 10 | 22 | 7 | 15 | |
| | <i>52</i> | <i>9</i> | <i>18</i> | <i>10</i> | <i>11</i> | |
| Cost of living | 20 | 26 | 27 | 13 | 14 | |
| | <i>18</i> | <i>32</i> | <i>32</i> | <i>9</i> | <i>9</i> | |
| Safety from Crime | 16 | 26 | 33 | 10 | 15 | |
| | <i>23</i> | <i>32</i> | <i>30</i> | <i>4</i> | <i>10</i> | |
| Condition of roads and highways | 17 | 31 | 33 | 11 | 8 | |
| | <i>12</i> | <i>40</i> | <i>30</i> | <i>12</i> | <i>6</i> | |
| Infrastructure (water, sewer, etc.) | 40 | 14 | 24 | 5 | 17 | |
| | <i>38</i> | <i>21</i> | <i>22</i> | <i>6</i> | <i>12</i> | |
| Traffic congestion | 20 | 37 | 26 | 10 | 7 | |
| | <i>11</i> | <i>58</i> | <i>20</i> | <i>7</i> | <i>5</i> | |
| Overall community livability | 23 | 13 | 38 | 19 | 8 | |
| | <i>22</i> | <i>18</i> | <i>41</i> | <i>11</i> | <i>9</i> | |
| Parks and recreation areas | 11 | 5 | 39 | 29 | 7 | |
| | <i>11</i> | <i>13</i> | <i>40</i> | <i>31</i> | <i>6</i> | |
| Overall cleanliness and appearance | 14 | 22 | 41 | 14 | 9 | |
| | <i>11</i> | <i>23</i> | <i>39</i> | <i>21</i> | <i>7</i> | |

 **Tourism's Positive Influence.**

 **Tourism's Negative Influence.**

*Deer Lodge 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, and 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.

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 (Table 27).

Deer Lodge County. Respondents from Deer Lodge County agree that tourism promotion by the state of Montana benefits their community economically and support continued tourism promotion by the state. In addition, respondents believe that the overall benefits of tourism outweigh the negative impacts, that increased tourism will help their community grow in the right direction, and that their community is an attractive place to invest in tourism development. Although positive by only a slight margin, respondents agree that increased tourism would improve the quality of life in their county. As with the statewide sample, Deer Lodge County respondents do not feel that they will benefit financially by increased tourism in their county.

Table 27: Support for Tourism Development

| Statement: | | Strongly Agree % | Agree % | Disagree % | Strongly Disagree % | Average Score** |
|--|---------------------|------------------|------------|------------|---------------------|-----------------|
| Tourism promotion by Montana Benefits my county economically | Deer Lodge → | 27%* | 52% | 16% | 5% | 3.01 |
| | <i>Statewide</i> → | <i>23</i> | <i>62</i> | <i>12</i> | <i>3</i> | <i>3.04</i> |
| I support continued tourism promotion and advertising To out-of-state visitors by the State of Montana | | 34 | 51 | 10 | 4 | 3.15 |
| | | <i>30</i> | <i>52</i> | <i>11</i> | <i>7</i> | <i>3.05</i> |
| The overall benefits of tourism outweigh the Negative impacts | | 18 | 47 | 25 | 10 | 2.73 |
| | | <i>14</i> | <i>62</i> | <i>17</i> | <i>7</i> | <i>2.83</i> |
| Increased tourism would help my county grow in the Right direction | | 31 | 44 | 16 | 8 | 2.98 |
| | | <i>19</i> | <i>45</i> | <i>26</i> | <i>10</i> | <i>2.74</i> |
| If tourism increases in Montana, the overall quality of Life for Montana resident will improve | | 11 | 41 | 36 | 12 | 2.50 |
| | | <i>6</i> | <i>46</i> | <i>37</i> | <i>11</i> | <i>2.47</i> |
| My community/county is an attractive place to invest In new tourism development | | 23 | 47 | 19 | 12 | 2.80 |
| | | <i>21</i> | <i>47</i> | <i>26</i> | <i>6</i> | <i>2.83</i> |
| I will benefit financially if tourism increases in my County | | 17 | 22 | 33 | 28 | 2.27 |
| | | <i>8</i> | <i>23</i> | <i>43</i> | <i>25</i> | <i>2.15</i> |

Although generally supportive of tourism promotion and development, county residents do not feel they will benefit financially by an increase in tourism in Deer Lodge county.

*Deer Lodge 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).

Deer Lodge County. Eighty-two percent of Deer Lodge County respondents would support land use regulations to help control the type of future growth in the county. The majority of county respondents do not agree that vacationing in Montana influences too many people to move to the state or that the state is becoming overcrowded because of tourists (Table 28).

Table 28: Concerns about Increased Tourism

Statement:

| | | Strongly Agree % | Agree % | Disagree % | Strongly Disagree % | Average Score** |
|--|-----------------------------|-------------------|------------------|------------------|---------------------|---------------------|
| I would support land- Use regulations to help Control the type of future growth in my community/county. | Deer Lodge → Statewide → | 28%* 24 | 54% 54 | 12% 16 | 7% 6 | 3.02 2.97 |
| Vacationing in Montana influences too many people to move to Montana | | 17 21 | 32 31 | 40 42 | 11 6 | 2.55 2.67 |
| In recent years, the state is becoming overcrowded because of more tourists | | 14 14 | 20 25 | 50 51 | 16 10 | 2.32 2.43 |

Deer Lodge County respondents would support land use regulations to control future growth.

*Deer Lodge 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).

Deer Lodge. Over three fourths of Deer Lodge County respondents believe there is adequate undeveloped open space in the county, but show some concern about it’s potential disappearance (58%). Respondents generally do not feel that the presence of tourists limits their access to recreation opportunities (66%) (Table 29).

Table 29: Land Use Issues

| Statement: | | Strongly Agree % | Agree % | Disagree % | Strongly Disagree % | Average Score** |
|--|--------------|------------------|------------|------------|---------------------|-----------------|
| There is adequate Undeveloped open space In my community/county. | Deer Lodge → | 29%* | 47% | 14% | 9% | 2.97 |
| | Statewide → | <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. | | 27 | 31 | 34 | 9 | 2.76 |
| | | <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. | | 13 | 21 | 49 | 17 | 2.30 |
| | | <i>10</i> | <i>27</i> | <i>54</i> | <i>10</i> | <i>2.37</i> |

Deer Lodge County respondents feel that there is adequate undeveloped open space, but are somewhat concerned about it's potential disappearance. They do not feel that their access to recreation opportunities are limited by the presence of tourists.

*Deer Lodge 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. Forty-nine percent of respondents strongly 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).

Deer Lodge County. Like their statewide counterparts in this survey, Deer Lodge County residents feel strongly that decision-making about tourism development in Deer Lodge County should include input from the residents of the county (91%), and do not agree that decisions should be left entirely to the private sector (64%).

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. | Deer Lodge → | 47%* | 44% | 8% | 1% | 3.38 |
| | Statewide → | <i>49</i> | <i>46</i> | <i>5</i> | <i><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. | | 11 | 24 | 37 | 27 | 2.20 |
| | | <i>12</i> | <i>28</i> | <i>44</i> | <i>17</i> | <i>2.34</i> |

Include county residents in all phases of the tourism planning and decision making process.

*Deer Lodge 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 categories 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).

Deer Lodge County. As with the statewide sample, economics are viewed as the primary benefit of increased tourism (67%). These benefits include more dollars, more jobs, profit for local businesses, etc. (Table 31). Overcrowding at attractions (18%) and migration of nonresidents to Montana (13%) were the most frequently noted disadvantages of increased tourism (Table 32).

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

| Top Advantage: | Statewide % | Deer Lodge County % |
|---|--------------------|----------------------------|
| Overall economic benefit: dollars, jobs, profit for business. | 85% | 71% |
| No advantage | 8% | 12% |
| Chance to "show off" Montana lifestyle | 2% | 3% |
| Off-set taxes | 1% | 1% |
| Learning about other cultures/meeting new people | 1% | 1% |
| Enhancing recreation opportunities | 1% | 2% |
| Promotes community growth/diversity | 1% | 2% |
| Increased awareness to preserve open & wild space | 1% | 1% |
| Attracts new business ideas | 1% | 5% |
| Clean Industry | 1% | -- |
| Promotes community cleanliness | | 1% |
| Promotes repeat business to Montana | | 1% |

The primary advantage to increased tourism is the perceived economic impacts to the community including jobs, profits, and new money to the community.

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

| Top Disadvantage: | Statewide % | Deer Lodge County % |
|--|--------------------|----------------------------|
| Wear & tear on roads; increased traffic & congestion/infrastructure stress | 25% | 10% |
| Overcrowding at attractions | 17% | 17% |
| Drives prices up, increased cost of living, more taxes | 10% | 8% |
| Abuse of land; pressure on resources/hunting pressure | 8% | 6% |
| No disadvantage | 8% | 12% |
| Migration, unwanted advise from visitors | 6% | 13% |
| No sales tax/tourists don't fully pay for services they use | 6% | 3% |
| Less security and safety, loss of way of life, decreasing quality of life | 4% | -- |
| Illegal activity (drugs, crime, etc) loss of peace | 3% | 8% |
| Litter/pollution | 3% | 3% |
| Commercialism/Development/Growth | 2% | 3% |
| Low paying jobs | 2% | 1% |
| Lack of services, accommodations, amenities, etc | 2% | 6% |

Deer Lodge County respondents see many of the same disadvantages to tourism as their state-wide counterparts, including wear & tear on roads & infrastructure stress, overcrowding at attractions, migration to Montana and unwanted lifestyle advise from visitors, increased prices, and increase in illegal activities.

DEER LODGE COUNTY SPECIFIC QUESTIONS

The Deer Lodge County Community Tourism Assessment Committee (CTAP) was given the opportunity to include questions specific to Deer Lodge 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.

Tourism Development/Promotion Potential of Deer Lodge County Recreation Resources

Residents were asked to rate the tourism development/promotion potential of a variety of tourism and recreation resources of Anaconda and Deer Lodge County. The rating scale used included 1 (no additional development/promotion), 2 (maintain for local use only), 3 (limited development/promotion), and 4 (intensive development/promotion).

Items indicated to receive intensive development/promotion include golf, arts in the park, smelter hill and its history, east highway 1 entrance, sporting events, downhill skiing, and cross country skiing. Georgetown Lake and the Miller Lake /Mt. Haggin area received more votes for "no additional development" than any of the other development options (Table 33).

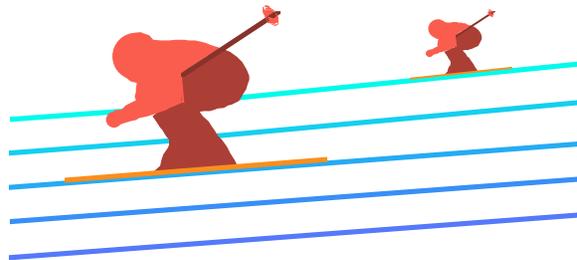


Table 33: Tourism Development/Promotion Potential of Deer Lodge County Resources

| Resource: | No additional development/promotion | Maintain for local use only | Limited development/promotion | Intensive development/promotion |
|-----------------------------|-------------------------------------|-----------------------------|-------------------------------|---------------------------------|
| Georgetown Lake | 38%* | 12% | 33% | 16% |
| Lost Creek State Park | 31 | 12 | 43 | 15 |
| Washoe Park | 19 | 17 | 40 | 23 |
| Downhill skiing | 15 | 2 | 36 | 48 |
| Ice Fishing | 25 | 11 | 36 | 28 |
| Golf | 21 | 2 | 20 | 57 |
| Washoe State Fish Hatchery | 14 | 6 | 42 | 39 |
| Miller Lake/Mt. Haggin area | 36 | 17 | 30 | 17 |
| Smelther Hill and history | 13 | 2 | 31 | 54 |
| East Highway 1 entrance | 10 | 6 | 32 | 52 |
| Cross country skiing | 16 | 8 | 32 | 44 |
| Fishing | 20 | 12 | 41 | 27 |
| Warm Springs Pond | 22 | 16 | 35 | 28 |
| Arts in the Park | 15 | 3 | 28 | 55 |
| Silver Lake | 27 | 15 | 31 | 28 |
| Big Hole River area | 26 | 12 | 35 | 27 |
| Warm Springs Mound | 28 | 13 | 31 | 28 |
| Snowmobiling | 20 | 9 | 39 | 32 |
| Hunting | 27 | 21 | 30 | 21 |
| Trail System | 15 | 13 | 42 | 30 |
| Sporting Events | 10 | 5 | 36 | 49 |

Deer Lodge County respondents encourage intensive tourism development and/or promotion of downhill skiing, golf, cross country skiing, Arts in the Park, and sporting events.

Deer Lodge County respondents favor limited to no additional tourism development and/or promotion for Georgetown Lake and the Miller Lake/Mt. Haggin area.

*Represents percent of responses for each resource in each category. Rows may not total 100% due to rounding.

Other Questions

Local Hotel/Motel Accommodations: Residents were asked whether local hotel/motel accommodations were adequate to meet the needs of visiting friends or family. Fifty-seven percent of respondents felt that local hotel/motel accommodations were adequate to meet the needs of their visiting friends and family, while 43 percent felt the accommodations were inadequate.

Volunteerism: Forty percent of respondents indicated that they were willing to volunteer time and assist in community events designed to promote tourism in Anaconda and Deer Lodge County.

Getting Travelers off I-90: Residents were asked for recommendations on how more travelers might be encouraged to exit Interstate 90 to explore Anaconda and Deer Lodge County. Advertising (25%), and better signage (22%) were the two most frequent responses to this question (Table 34).

Table 34: Recommendations for Getting Travelers to Exit I-90

| Recommendations: | Deer Lodge County % |
|--|------------------------------------|
| Advertising (in general) | 25% |
| Better Signage on Interstate/Highways | 22% |
| Toll-free Information Line at Chamber of Commerce | 12% |
| More shopping opportunities | 11% |
| More overnight accommodations | 6% |
| Promote smelter/stack | 4% |
| Special events with short-term impacts | 4% |
| Keep Chamber of Commerce & Visitor Information center open later/longer hours | 4% |
| More entertainment | 3% |

GENERAL COMMENTS

Respondents were given an opportunity and space at the end of the survey form to include their own thoughts and comments. Thirty-six residents took the time to provide additional comments related to this subject. Table 35 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 Deer Lodge County comments, see Appendix C.

Table 35: General Comments

| General Themes of Comments | Statewide* % | Deer Lodge County** % |
|--|-------------------------|--------------------------------------|
| Need a sales tax/resort tax | 17% | -- |
| Montana has been or will be damaged by outside influences | 10% | 2% |
| Don't need minimum wage jobs | 10% | 4% |
| Support increased tourism/good economic boost | 7% | -- |
| Tourism industry doesn't maintain quality of life | 6% | 2% |
| Don't support tourism-based economy/increased tourism | 5% | 7% |
| Tourism drives prices up/Cost of living | -- | 4% |
| Need more shopping opportunities | -- | 4% |
| Need to reach out to students, teens. Provide entertainment and opportunities to stay in the area. | -- | 4% |
| Don't support migration to Montana by nonresidents | -- | 7% |

* Represent comments made by 49 respondents.

** Represent comments made by 36 respondents

APPENDIX A: DEER LODGE COUNTY SURVEY INSTRUMENT

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 50th - 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: DEER LODGE COUNTY "OTHER" RESPONSES AND COMMENTS

"OTHER" RESPONSES

Other Top Advantages of Increased Tourism in Deer Lodge County

- Chance to "show off" Montana lifestyle/exposure
- Off-sets taxes
- Learning about other cultures/meeting new people
- Enhanced recreation opportunities
- Promotes community growth/diversity
- Increased awareness to preserve open/wild spaces/local issues
- Attracts new business/ideas
- Promotes community cleanliness
- Promotes repeat visits to Montana

Other Top Disadvantages of Increased Tourism in Deer Lodge County

- No sales tax/Tourists don't fully pay for services they use
- Illegal activity (drugs, crime, etc.)/disruption of peace
- 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
- Abuse of land; pressure on natural resources/hunting pressure
- Community/land use changes; loss of land-owner rights
- Resident animosity toward tourism
- Community appearance is less than desirable/NA Reservation is undesirable
- Animosity of locals toward Indians
- Change in types of people
- They don't have to stay or spend money
- Lack of coordinated tourism development
- Tourists abuse privileges

Other Ways to Encourage Tourists to Stop in Deer Lodge County

- Better public transportation
- Promote route through Anaconda (to Missoula, etc.)
- Clean-up community
- Promote smelter/stack tours
- Encourage franchise motels to come in
- More restaurants
- More overnight accommodations
- Establish a toll-free info line for Chamber of Commerce
- Build theme park
- Promote "year-round" events
- Promote dining facilities
- Remove pubs/bars
- Promote "family-friendliness" of town
- Longer hours at businesses, visitor center, and chamber of commerce
- More entertainment

- Horse-friendly vacation town/Wild West atmosphere
- Better turn off highway to West Valley
- Get rid of speed trap on highway 1
- Reduced prices of goods/gas
- More visually appealing exits/entrances
- Better hospitality/nicer to tourists
- Railway link between Butte and Anaconda

Other Opportunities for Economic Development in Deer Lodge County

- High-tech industries
- Construction
- Retirement
- Museums and cultural centers/historic preservation
- Private prison
- Recreation

DEER LODGE COUNTY COMMENTS

Don't Need Minimum Wage Jobs

We have one of the largest power supplies available and the lowest wages in the US. Tourist dollars are approximately 87 percent below manufacturing dollars. The available power is left over from the smelter.

The amount it costs to purchase a home is way too high. For people in need of a job, it is very difficult to become employed. Wages are too low in many jobs and no benefits.

Most tourist money goes out of state to big motel chains and oil companies. Tourism damages everything and contributes to very few. Employees of the tourism industry are poorly paid and many are illegal aliens.

Tourism Industry Doesn't Maintain Quality of Life/Must Fight to Maintain Quality of Life

Its almost impossible to get into Safeway. The people who come in here are bad mannered. I find them very hard to get along with. They tailgate your car and they have everything they can pull on the highway. I think you should help us first, instead of tourists. I want a turn off on this highway and a road behind my house. The state took our turn off away. I want it back.

I was a career military wife and I traveled and lived all over the US. Anaconda is a unique, somewhat untouched treasure. Every tourist I speak with is impressed with our street lights, stop lights, architecture, small town atmosphere. We lost many tourist attractions in the 70s with Urban Renewal and I truly hope we can concentrate on saving what is left as from personal experience, we are one of few cities left where the history can bring revenue for our town.

I just don't want to lose the quality of life I moved here to have. When I lived in a large city, it was busy (too much so) and people were not friendly like home and the quality of life was no where as good as Montana life. The more people, the more crap - the breakdown of trust and quality of everything.

Poor Highway Maintenance and Poor Planning Hurts Tourism

We need to have a community to help people fix up their houses. Something needs to be done in the winter time when we have heavy snows and side streets are hard to deal with trying to get around, such as keeping streets clear at intersections is not adequate. There is not enough being put out to deal with the amount of ice that builds up. Plus the lighting of the street lamps is inadequate. Half of the time, the east side of town has no lights, such as last winter. Have heard tourists complain about these items also. I pay taxes to take care of these things.

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Don't Support Tourism-Based Economy/Increased Tourism

Tourism brings more problems than it's worth!

I think ADLC would be better to try to promote business growth rather than tourism. I would hate to ever see Anaconda become a resort town, as the only thing it would do is drive the cost of living out of site and completely shut down or over-stress forests, lakes, and streams. I use Jackson Hole and Sun Valley as examples. I like Anaconda the way it is. Any growth/promotion should be in a way to benefit locals. After all, we live here and tourists are visitors only!!

Tourism Drives Prices/Cost of Living Up

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Don't Support Migration to Montana by Nonresidents

Don't need anymore out of state big money people, etc

Why do we have to consider saturating our areas. Tourism related jobs traditionally bring corporate expansion of motel chains, or big bucks getting more big bucks. The workforce is paid poorly. Time and effort should be spent to expand business in areas we can export products from Montana rather than populating our area with part-time residents (summer- and fall-home people) and uneducated immigrants. If people want to live here, they should work in industry here (look at the Mexican population present and they aren't even US citizens).

Need to Provide Opportunity for Younger Generations to Stay in Area

Anaconda has nothing to offer for the young if there isn't more better paying jobs that higher qualified people not because you know someone. Anaconda will die. Ghost towns have tourists. It doesn't keep the town alive.

I would like to see something happening around here so our young people could stay in this area that they love so much.

Need More Shopping Opportunities

Discourage shopping out of town (have attractive sales). Bring in entertainment that all classes can enjoy. Support our local leaders and promoters; the worthwhile activities and community projects.

When we go shopping for most things, we either go to Missoula or Spokane. We don't have a lot of stores to choose from. I'm into crafts, so finding what I need here is very limited. Most times I have to go through the mail or travel hundreds of miles.