

**Exploring Tourism Development Potential:
Resident Attitudes in
Pondera County, Montana**

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EXECUTIVE SUMMARY

This report presents information about tourism in Pondera County, Montana. It includes the results of a Pondera County resident attitude survey, providing residents' opinions and attitudes regarding tourism and tourism development in the state and in the region, along with results of a statewide survey for comparative purposes. The report also offers estimated travel volume and traveler characteristics for the county.

A mail-back questionnaire was administered to a randomly selected sample of 500 Pondera County households during October and November 2000, and to a statewide sample of 1,145 Montana households during the same time period. The survey sequence was initiated by mailing a pre-survey notice letter to all selected households a few days prior to mailing the questionnaire. The survey mailing itself was then followed by a reminder/thank-you postcard a week later. Two weeks after mailing the postcard, a replacement survey was sent to those households who had not yet responded.

NONRESIDENT VISITORS:

- In 1999, nearly 3.9 million travel groups visited Montana. Of those, approximately 540,000 (14%) passed through Pondera County.
- Close to \$1.59 billion was spent statewide in 1999 by nonresident travelers. This figure amounts to approximately \$1,761 for every Montana resident.
- In Pondera County, nonresident visitors spent close to \$2.4 million in 1999, or about \$381 per county resident.
- Travelers to Pondera County stayed in Montana somewhat longer than statewide visitors.
- Visitors to Pondera County reported that the best source of travel information while in Montana was persons in motels, restaurants, gas stations, etc.
- Sixty percent of visitors to Pondera County were in Montana primarily for vacation, and 15 percent were in the state mainly to visit family or friends.
- Travelers in Pondera County were attracted to Montana primarily because of Glacier Park.
- Visitors to Pondera County spent most of their money at gas stations and in restaurants/bars.
- Pondera County visitors traveled mainly as couples, but also as families.
- Overnight visitors to Pondera County were about as likely as statewide visitors to stay in hotels/motels, and were more likely to stay in the home of a friend or relative.

RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:

- Respondents from Pondera County have resided in their communities and in the state for a longer time than the statewide sample.
- Exactly three-fourths of the Pondera County sample are native Montanans.
- The majority of Pondera County respondents feel tourism should have a role equal to other industries in the local economy, but ranked the tourism and recreation industry 5th on a list of desired economic development.
- Most Pondera County respondents work in places they say supply none of their products and services to tourists or tourist businesses.
- Statewide respondents have a stronger attachment to their communities than do Pondera County respondents. Both groups are somewhat concerned about the future of their communities.
- Sixty-eight percent of Pondera County respondents feel that the population in the area is decreasing, and 70 percent of these feel it is decreasing too fast.
- Pondera County respondents feel that their quality of life can be enhanced by improving job opportunities, as well as museums and cultural centers.
- Pondera County respondents largely agree that tourism will have a positive influence on museums and cultural centers, job opportunities and parks and recreation areas.
- The respondents of Pondera County are generally supportive of tourism development, more so than the statewide sample. Although few feel they will benefit personally from tourism, they agree that it will improve the quality of life for people in Montana.
- Seventy percent of Pondera County respondents would support land-use regulation to control the type of future development in their community.
- Pondera County respondents think there is adequate undeveloped open space in the county, and are not particularly concerned about its disappearance.
- Respondents feel strongly that any decision about tourism development should involve the local residents and not be left entirely to the private sector.
- Overall economic benefit is perceived as the primary advantage of increased tourism in Pondera County, while increased traffic, crowding and crime are seen as the leading disadvantages.

LOCAL ISSUES FOR PONDERA COUNTY RESIDENTS:

- Respondents agree that the Whoop-Up Days, the recreational facilities at Tiber Dam and Lake Frances, as well as the Swift Dam County Park are all well suited for further development to increase tourist visitation to Pondera County.
- Twenty-two percent suggested nicer motels as a means to prolong the stay of families who are in the area for sporting events.
- One-third of respondents see a lack of local attractions as the main weakness of Pondera County as a tourist destination.

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INTRODUCTION

This research report is intended to provide a profile of current visitors to Pondera County, as well as resident attitudes regarding tourism and the travel industry in the county.

The results of two different studies were used in compiling this report. First, nonresident visitor profiles for Pondera County and the state of Montana were developed using research conducted by ITRR during the summer of 1996. At that time, nonresident visitors to Montana were surveyed during a four-month study. A profile of Pondera County visitors was developed from the subset of surveys submitted by nonresident travelers passing through the county. For comparative purposes, both statewide and Pondera County visitor profiles are provided.

Second, resident attitudes toward tourism and the travel industry were assessed using mail-back questionnaires obtained from households in Pondera County as well as the state. Both surveys were conducted during October and November, 2000, and the results are reported together to provide a point of comparison between the two populations.

The report is presented in two sections. The visitor profiles for Pondera County and Montana can be found in section I, while resident attitudes towards tourism and the travel industry in Pondera County and in Montana are presented in section II.

Funding for this research came from the Lodging Facilities Use Tax. Copies of this report can be downloaded from ITRR's web site (www.forestry.umt.edu/itr) at no charge.

SECTION 1: THE NONRESIDENT TRAVEL STUDY

Data collected for this section of the report comes from ITRR's 1996 Nonresident Summer Travel Study¹.

METHODOLOGY

Travelers to Montana during the summer season of 1996 (June 1-September 30) were intercepted for the Nonresident Summer Travel Study. The traveler population was defined as those travelers entering Montana by private vehicle or commercial air carrier during the study period, and whose primary residence was not in Montana at the time. Specifically excluded from the study were those persons traveling in a clearly marked government or commercial vehicles such as a scheduled or chartered bus, or a semi-truck. Also excluded were those travelers who entered Montana by train. Other than these exclusions, the study attempted to assess all types of travel to the state.

Data was obtained through a mail-back diary questionnaire 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, resulting in a response rate of 45 percent. A sample of 866 respondent groups traveled through Pondera County in the summer of 1996 (Table 1).

Table 1: Sample Sizes and Response Rates for the 1996 Summer Nonresident Travel Survey

	Statewide	Pondera County
Nonresident groups contacted	12,941	
Usable questionnaires returned	5,800	
Nonresident Travel Study response rate	45%	
Pondera County sample size		866
Percent of nonresident sample	100%	14%

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. 113pp.

A PROFILE OF SUMMER VISITORS

ITRR nonresident travel estimates report that approximately 2,273,000 groups, averaging 2.6 people per group, visited Montana during the 1999 summer season². It was estimated that 14 percent, or 318,220, of those groups passed through Pondera County, but that only 2 percent of those who traveled through spent at least one night there.

CAUTION

Travel group characteristics for Pondera County were obtained from visitors who spent at least one night in the county. As mentioned above, only 2 percent of those who drove through the county were captured for the night, and 2 percent of the Pondera County sample of 866 travel groups amounts to only 20 groups. A sample size of 20 is much too small to provide reliable estimates about any population, so the reader is asked to use caution when generalizing the information about Pondera County given in Section I of this report. The behavior of the overnight sample is not necessarily reflective of the behavior of the actual population of travelers, both with respect to spending patterns and activity participation. What is more, some of the characteristics reported here may even appear odd to the reader. Again, these seeming inconsistencies are due to the small sample size.

GROUP CHARACTERISTICS

There were some differences between the travel groups staying overnight in Pondera County and the statewide sample (Table 2).

Pondera County: The average group size for Montana visitors who spent at least one night in Pondera County was 2.9. 86 percent of travelers had visited Montana before this trip. Most summer visitors to the county traveled as couples (50%), while 35 percent traveled with family. The largest portion of males was between 30 and 49 years old (26%), while the largest portion of females was between 50 and 64 years old (32%). The majority of summer visitors chose to spend their nights in a hotel or a motel (57%), and stayed an average of 5 nights.

Statewide: For all travelers to Montana, the average group size was 2.6, slightly smaller than for Pondera County visitors. A full 77 percent were repeat visitors, and most traveled as couples (38%), with almost as many traveling as family (34%). The largest portion of the statewide male visitor population was between 30 and 49 years old (31%), as was the case for females (33%). A typical visitor to Montana spent 3 nights in the state, and was most likely to stay in a hotel or motel (59%).

² The total number of travelers is estimated each year, while the profile of visitors is only re-evaluated every few years. Therefore, this report presents traveler characteristics that are estimated from data collected in the summer of 1996, applied to the estimated number of travelers and their total economic impacts for 1999. At the time this report was written, travel volume for the year 2000 was still preliminary. For this reason, nonresident travel volume and economic impact estimates are for 1999.

Table 2: Characteristics of Summer Nonresident Visitors

	Pondera County*	Statewide
Group Type		
Couple	50%	38%
Family	35%	34%
Alone	10%	17%
Friends	--	7%
Family & friends	5%	3%
Business associates	--	1%
Group or club	--	--
Group Size	2.9	2.6
Have previously visited Montana	86%	77%
Nights spent in Montana	4.8	3.5
Accommodations used in Montana		
Home of friend or relative	33%	21%
Hotel or motel	57%	59%
Private campground	10%	18%
Public campground	24%	16%
Undeveloped campground	14%	4%
Resort or guest ranch	5%	5%
Condominium	--	1%
Other	19%	5%
Age of Males		
Under 18 years old	23%	19%
18-29 years old	10%	10%
30-49 years old	26%	31%
50-64 years old	13%	24%
65 years old and over	28%	16%
Age of Females		
Under 18 years old	12%	18%
18-29 years old	8%	10%
30-49 years old	24%	33%
50-64 years old	32%	25%
65 years old and over	24%	14%

Source: ITRR

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

Percentages do not add to 100 because respondents could indicate more than one response category.

Visitors to the state as well as to Pondera County were from a variety of origins. However, as mentioned before, the Pondera County sample was too small for any frequency of origin to be computed. In the statewide sample, the most common origin was Washington, closely followed by California and Idaho (Table 3).

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

Rank*	Pondera County	Statewide
1		Washington
2		California
3		Idaho
4		Wyoming
5		Colorado

Source: ITRR

*1=highest frequency

INFORMATION SOURCES

Nonresident travel groups indicated which information sources were used as planning tools for their trip *prior* to arriving in Montana, as well as while they were *in* Montana. Also, respondents indicated which of the sources were the most useful to them. Lists of information sources were included in the questionnaire (Tables 4, 5, 6 and 7).

Pondera County: Fourteen percent of visitors to Pondera County did not use any of the listed sources prior to their trip. The three most frequently used sources of travel information were the Montana Travel Planner (33%), travel guide books (33%), and National Park brochures (24%). The *most useful* sources of information used *prior* to arriving in Montana were travel guide books (25%), National Park brochures (19%), AAA (13%), toll-free state travel number (13%) and information from private businesses (13%).

Statewide: Forty percent of statewide visitors did not use any of the 11 listed information sources *prior* to travel. However, 31 percent used AAA, 22 percent used travel guide books and 20 percent used the Montana Travel Planner. The *most useful* sources of information used prior to travel were AAA (39%), travel guide books (19%) and National Park brochures (12%).

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

	Pondera County*	Statewide*
None of the sources	14%	40%
Travel guide book	33%	22%
Montana Travel Planner	33%	20%
National Park brochure	29%	13%
AAA	24%	31%
Toll-free state travel number	10%	7%
Chamber or visitor bureau	10%	7%
Information from private businesses	14%	7%
State Park brochure	5%	5%
Internet travel information	5%	4%
Regional travel number	--	1%
Attending travel trade show	--	--

Source: ITRR

* Visitors could indicate more than one information source.

Table 5: Most Useful Source of Information Used Prior to Visit to Montana

	Pondera County*	Statewide*
Travel guide book	25%	19%
National Park brochure	19%	12%
Toll-free state travel number	13%	4%
Information from private businesses	13%	6%
AAA	13%	39%
Montana Travel Planner	6%	11%
Internet travel information	6%	1%
State Park brochure	--	3%
Chamber or visitor bureau	--	5%
Regional travel number	--	--
Attending travel trade show	--	--

Source: ITRR

* Percentages may not add to 100 due to rounding.

Pondera County: Visitors were also asked where they received travel information while *in* Montana. For overnight visitors to Pondera County, the travel information sources used the most frequently were persons in motels, restaurants, gas stations, etc., (52%), highway information signs (43%), and brochure racks (38%). Visitors then indicated what source was the *most useful* while traveling *in* Montana. Forty percent of respondents stated that persons in motels, restaurants, gas stations, etc. were most helpful, followed by other information sources (27%). Other information sources usually included family or friends.

Statewide: Thirty-five percent of statewide visitors indicated that while *in* Montana they obtained travel information from persons in motels, restaurants, gas stations, etc. Other important information sources were highway information signs (33%) and brochure racks (26%). Of the information sources used while *in* Montana, statewide visitors indicated that the *most useful* were persons in motels, restaurants, gas stations, etc. (24%), followed closely by persons in visitor information centers (22%).

Table 6: Source of Information Used While In Montana

	Pondera County*	Statewide*
None	10%	36%
Person in motel, restaurant, gas station, etc.	52%	35%
Highway information signs	43%	33%
Brochure rack	38%	26%
Person in visitor information center	33%	24%
Other	19%	18%
Business billboards	5%	10%
Computer touch-screen info center	--	--

Source: ITRR

* Visitors could indicate more than one information source.

Table 7: Most Useful Source of Information Used While In Montana

	Pondera County*	Statewide*
Person in motel, restaurant, gas station, etc.	40%	24%
Other	27%	18%
Brochure rack	13%	15%
Person in visitor information center	13%	22%
Highway information signs	7%	19%
Business billboards	--	2%
Computer touch-screen info center	--	--

Source: ITRR

*Percentages may not add to 100 due to rounding.

PURPOSES OF SUMMER TRIP

Nonresident travel groups were asked their reasons for traveling to Montana. Many visitors had more than one reason and were thus asked to identify their *primary* reason for coming to the state as well (Table 8).

Pondera County: Eighty-six percent of Pondera County visitors indicated that vacation was one reason for traveling to Montana. Other frequently mentioned reasons included visiting family and friends (38%) and recreational shopping (24%).

With respect to Pondera County overnight visitors' *primary* reason for visiting the state, nearly two-thirds (60%) were in Montana primarily for vacation. Other common *primary* reasons included visiting family and friends (15%) and recreational shopping (10%).

Statewide: Over three-fourths of statewide visitors cited vacation as one reason for their trip to Montana. Also frequently mentioned were visiting family and friends (31%) and passing through (31%).

Statewide travelers most frequently cited vacation as their *primary* reason for visiting Montana (49%). Passing through the state (21%) and visiting family or friends (16%) were also indicated as primary reasons.

Table 8: Reasons for Traveling to Montana

	Pondera County		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	86%	60%	77%	49%
Visit family or friends	38%	15%	31%	16%
Recreational shopping	24%	10%	9%	1%
Passing through	14%	5%	31%	21%
Convention or meeting	5%	5%	2%	1%
Business	5%	--	10%	6%
Other	5%	5%	4%	3%
Necessity shopping	--	--	4%	1%
Medical	--	--	3%	2%

Source: ITRR

* Visitors could indicate more than one reason.

** Percentages may not add to 100 due to rounding.

MONTANA ATTRACTIONS

Respondents who indicated that one purpose for their trip was vacation were asked what attracted them to Montana as a vacation destination. They were asked to indicate *all* appropriate attractions, and then to indicate one *primary* attraction (Table 9).

Pondera County: Many Pondera County vacationers were attracted by more than one of the state's many features. The top Montana attractions included the Glacier National Park (67%), the mountains (67%), lakes (48%), historic sites (38%), Yellowstone National Park (33%) and the rivers (33%). Glacier National Park (64%) was the most popular *primary* attraction for Pondera County visitors.

Statewide: Statewide visitors were also attracted to Montana for many reasons. The top attractions to Montana included the mountains (51%), Yellowstone National Park (39%), the rivers (35%), Glacier National Park (31%) and open space (31%). The most frequently cited *primary* Montana attractions for statewide visitors were Glacier National Park (24%) and Yellowstone National Park (21%).

Table 9: Attractions of Montana as a Vacation Destination

	Pondera County		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
Glacier National Park	67%	64%	31%	24%
Mountains	67%	6%	51%	12%
Lakes	48%	6%	26%	1%
Historic sites	38%	6%	13%	2%
Yellowstone National Park	33%	--	39%	21%
Rivers	33%	--	35%	1%
Open Space	29%	--	31%	6%
Wildlife viewing	19%	--	28%	2%
Uncrowded areas	19%	6%	27%	4%
Friendly people	19%	--	18%	3%
National forests	19%	6%	15%	1%
Camping	14%	--	19%	2%
Montana history	14%	--	11%	1%
Native American culture	14%	--	10%	1%
Hiking	5%	--	15%	1%
Northern Great Plains	10%	--	6%	--
Badlands	10%	--	6%	1%
Fishing	5%	--	14%	6%
Special attractions	5%	6%	8%	6%
Wilderness areas	5%	--	5%	1%
State parks	5%	--	6%	--
Special events	--	--	4%	4%

Source: ITRR

* Visitors could indicate more than one attraction.

** Percentages may not add to 100 due to rounding.

VISITOR ACTIVITIES

Some differences can be seen among the activities participated in by statewide visitors and by overnight visitors to Pondera County (Table 10).

Pondera County: Nature photography and recreational shopping were the most popular activities among those visitors spending a night in Pondera County (45% each), followed by wildlife watching (40%) and visiting historic/interpretive sites (40%). Other popular activities included visiting family and friends (35%), camping in developed areas (30%) and picnicking (25%).

Statewide: For all visitors to the state, wildlife viewing topped the list of recreational activities (45%). Visiting family or friends was popular as well (34%), as was nature photography (33%) and recreational shopping (32%).

Table 10: Recreational Activity Participation

	Pondera County*	Statewide*
Nature photography	45%	33%
Recreational Shopping	45%	32%
Wildlife watching	40%	45%
Historic/interpretive sites	40%	29%
Visiting family or friends	35%	34%
Camping (developed areas)	30%	28%
Picnicking	25%	26%
Visiting museums	20%	21%
Day hiking	20%	29%
Camping (primitive areas)	15%	10%
Swimming (in pools)	10%	14%
Gambling	10%	10%
Visiting Native American sites	10%	10%
Fishing	10%	15%
Swimming (in natural areas)	10%	7%
Nature studies	5%	9%
Special event/Festivals	5%	8%
Golfing	--	5%
River floating/rafting	--	6%

Source: ITRR

* Visitors could indicate more than one activity.

ECONOMIC CHARACTERISTICS

Information about the number of visitors to an area and how much they spend during their visit there is useful for planning purposes. While travel group characteristics are based only on groups who spent a night in Pondera County during the summer, economic information is more inclusive and represents all groups who spent money in the county throughout the entire year (Table 11).

ITRR staff estimated that 3,898,000 travel groups visited Montana in 1999. Of those nearly 3.9 million groups, approximately 540,000 (14%) passed through Pondera County.

Pondera County: Nonresident spending in Pondera County totaled \$2,382,000 in 1999, or about 1.2 percent of all nonresident spending in Montana. Nonresidents spent the equivalent of \$381 per person in the county.

Statewide: Nonresident visitors spent close to \$1.6 billion in the state in 1999. This amounted to about \$1,760 per Montana resident.

Table 11: Expenditures by Nonresident Travelers in Pondera County and in Montana

	Pondera County	Statewide
Lodging, campgrounds, etc.	14%	17%
Auto rental and repair, transportation	--	4%
Gas and oil	25%	22%
Restaurant, bar	19%	18%
Groceries, snacks	5%	8%
Retail sales	3%	24%
Miscellaneous services	33%	6%
Total travel groups to sample area, 1999	540,000	3,898,000
Total expenditures in sample area, 1999 (1999\$)	\$2,382,000	\$1,589,000,000
Per capita expenditures in sample area, 1999 (1999\$)	\$381	\$1,760

Sources: ITRR; Montana Census and Economic Information Center³.

³ MT Department of Commerce, Census and Economic Information Center. Data sets CO-99-8 "Montana Estimates of the Population of Montana and Counties: Annual Time Series", accessed at ceic.commerce.state.mt.us/Demog/estimate/pop/County/cty99allrank, and "April 1, 2000 Resident Population Data", accessed at ceic.commerce.state.mt.us/C2000/c2000data/tab02.

SECTION II: THE RESIDENT ATTITUDE STUDY

Data for this section of the report came from the ITRR Resident Attitude Study conducted in Pondera County and in Montana in October and November 2000. A copy of the survey instrument can be found in Appendix A.

METHODOLOGY

A mail-back questionnaire was administered to a sample of Pondera County residents, as well as to a sample of statewide residents in the fall of 2000. The distribution followed an updated version of Dillman's Total Design Method (TDM)⁴, and differs slightly from previous ITRR resident attitude surveys. It is believed that these updates to the survey instrument and mailing sequence helped improve the study's response rate which has dwindled in recent years. This year however, the response rate for both samples exceeded 40 percent.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a selected sample of 500 Pondera County households, as well as to a sample of 1,145 Montana households. This letter informed recipients of the upcoming survey and alerted them to the appearance of a questionnaire in their mailbox in the near future. Shortly thereafter, a questionnaire was mailed to the same households, along with a cover letter stating in more detail the purpose and nature of the study. For the sake of random selection, this letter also requested that the adult with the most recent birthday be the one to complete the questionnaire.

One week following the questionnaire mailing, a postcard was sent, serving the dual purpose of thanking respondents for their efforts if they had already returned their questionnaire, and reminding those who had set it aside to complete and return it. After two more weeks, replacement questionnaires were sent to those households that had not yet responded to the first questionnaire mailing. Included this time was a different cover letter addressing some concerns residents may have that so far had kept them from responding. The cut-off day for accepting returned questionnaires was four weeks following the last mailing.

A non-response bias check was not conducted at the conclusion of the sampling effort. Such bias checks generally take the form of a telephone interview to determine if those in the sample who did not respond to the questionnaire differ on key issues from those who did respond. In this case, the key questions where opinions may have differed involve statements of support for tourism development. These key questions can only be answered after considering other questions asked in the survey. It was therefore not possible to develop a condensed telephone non-response questionnaire.

The reader is cautioned to bear in mind that the results presented here are the opinions of only 49 percent of the Pondera County residents polled (Table 12). It is assumed that respondents did not differ from non-respondents in their opinions. Because the age distribution of the survey respondents differed from the July 1, 1999, Montana census estimates of age groups⁵, responses were weighted to more closely reflect the population of Pondera County. Results presented in this report reflect the adjusted dataset.

Table 12: Sample Sizes and Response Rates

	Pondera County	Statewide
Resident questionnaires mailed out	500	1,145
Undeliverables	92	188
Usable resident questionnaires returned	198	401
Resident Attitude Study response rate	49%	42%

⁴ Dillman, Don A. 2000. *Mail and Internet Surveys: The Total Design Method*. John Wiley & Sons, Inc. New York, NY.

⁵ MT Department of Commerce, Census and Economic Information Center. Data set CO-99-13 "Population estimates for counties by age group: July 1, 1999". Accessed at ceic.commerce.state.mt.us/Demog/estimate/pop/County/mtcty99agegroup.

PONDERA COUNTY RESIDENTS' ATTITUDES

As a community pursues tourism as a development strategy, the goals of that effort generally include an improved economy, more jobs for local residents, community stability, and, ultimately, a stable or improved quality of life for the community's residents. Understanding how residents perceive the conditions of their surroundings and tourism's influence on those conditions can provide guidance in making development decisions responsive to resident opinions.

Residents of an area may hold a variety of opinions about tourism and other forms of economic development. Attitudes and opinions are good measures for determining the level of support for community and industry actions. The resident opinion questionnaire addresses topics that provide residents' perceptions of current conditions and tourism's role in the community.

RESPONDENT CHARACTERISTICS

Age and gender, as well as length of residency in Pondera County and in the state, were explored in the respondent characteristics section of the survey.

Age and gender: Respondents were asked to indicate their gender as well as their age (Table 13).

Pondera County: Forty-three percent of Pondera County respondents were male, compared to the actual ratio which is 50 percent⁶. The average age of all respondents was 51 years, and they ranged in age from 21 to 94 years.

Statewide: Of respondents to the statewide survey, 48 percent were male, close to the actual ratio of 50 percent⁷. The average age of all respondents was 52 years, with the range spanning 18 to 89 years.

Table 13: Respondents' Age and Gender Characteristics

	Pondera County	Statewide
Average age	51 years	52 years
Minimum age	21 years	18 years
Maximum age	94 years	89 years
Percent male	43%	48%
Percent female	57%	52%

⁶ MT Department of Commerce, CEIC.

⁷ Ibid.

Residence: Survey subjects were asked if they were born in Montana, as well as how long they had lived in the state and in their current community. Pondera County respondents were asked how long they had lived in their county (Table 14 and 15).

Pondera County: A full 75 percent of Pondera County residents indicated that they are native Montanans. On average, they have lived in the county for 35 years and in the state for 46 years. Ninety percent of respondents' lives were spent in Montana. Thirty-nine percent of Pondera County respondents have lived in the county longer than 40 years, and 16 percent have lived there 10 years or less.

Statewide: Approximately half (52%) of statewide respondents were native Montanans. On average, they have lived in their community for 24 years, and in Montana for 33 years. Seventy percent of respondents' lives were spent in the state. Twenty percent of respondents have lived in their community longer than 40 years, and 32 percent have lived there 10 years or less.

Table 14: Residency Characteristics

	Pondera County	Statewide
Born in Montana	75%	52%
Mean years lived in community	35 years	24 years
Mean years lived in Montana	46 years	33 years
Age (mean years)	51 years	47 years
Percentage of life spent in community	67%	51%
Percentage of life spent in state	90%	70%

Table 15: Community Residency

	Pondera County	Statewide
10 years or less	16%	32%
11 to 20 years	10%	17%
21 to 30 years	22%	20%
31 to 40 years	13%	11%
41 to 50 years	13%	7%
51 to 60 years	11%	8%
61 years or more	15%	5%

Employment status: A person's employment status, type of job and sector of employment can all influence support for tourism development. In general, the more dependent a person is financially on the travel industry, the greater the support for tourism (Tables 16, 17 and 18).

Pondera County: Sixty-eight percent of respondents to the Pondera County resident attitude survey are employed, while one-fourth is retired. Responding households derive their income in about equal measure from the government, service and agriculture sectors (21%, 21% and 24%, respectively). Wholesale/retail trade provides for another 13 percent of households. Approximately 2 percent of respondents recognize that they derive a portion of their household income from the travel industry. However, employees in the service sector may unknowingly be part of the Montana travel industry.

Statewide: Of statewide respondents, 73 percent are employed, and 5 percent are either unemployed or disabled. Twenty-eight percent of respondents indicated that their household derives at least a portion of their household income from the service sector. Other sources of household income included government (16%), wholesale/retail trade (14%) and agriculture (14%). Approximately 4 percent of statewide households recognize that they derive some portion of their income from the travel industry. Like in Pondera County, some of the statewide respondents who indicated that they are employed in the service sector may in fact be part of the travel industry.

Table 16: Employment Status

	Pondera County	Statewide
Employed	68%	73%
Retired	25%	22%
Unemployed/Disabled	7%	5%

Table 17: Source of Household Income

Sector	Percent of households deriving income from sector*	
	Pondera County	Statewide
Agriculture	24%	14%
Government	21%	16%
Services**	21%	28%
Wholesale or retail trade	13%	14%
Construction	6%	12%
Finance, Insurance or Real Estate (FIRE)	5%	8%
Forestry	4%	3%
Transportation, Communication, Utilities	2%	7%
Travel industry	2%	4%
Manufacturing	1%	5%
Mining	<1%	2%

* Households can derive income from more than one source.

** See table 18 for specific services.

Table 18: Specific Services as Source of Household Income

Service Sector	Pondera County	Statewide
Laundry services	--	2%
Health care/Medical care/Social work	42%	28%
Education/Daycare	28%	28%
Professional services	11%	9%
Restaurant/bar*	8%	6%
Auto repair	--	4%
Hotel industry	--	2%
Heating/Air/Plumbing	--	3%
Welding/Construction/Oil drilling	--	3%
Religious services	3%	--
Garbage	--	1%
Janitor/Maid	3%	3%
Outfitter/Guide	--	--
Religious services	3%	2%
Fitness	--	1%
Home repair/Carpentry	--	3%
Computer services	--	1%
Media	3%	3%
Hair stylist/Cosmetologist	3%	1%
Total respondents	36	114

* The "Restaurant/Bar" category does not technically belong in the Service sector, according to the Standard Industrial Classification index. It is part of the Wholesale/Retail Trade sector in Table 16 as "Eating and Drinking Places". However, it is a common belief that it is a part of the Service sector and it is therefore included here.

Place of residence: Respondents were asked to indicate if they live in town (urban setting) or out of town (rural setting) (Table 19).

Pondera County: Sixty-one percent of Pondera County respondents indicated that they live in town. Residents from rural areas made up 39 percent of respondents.

Statewide: Well over half of statewide respondents indicated that they live in town, leaving 42 percent who consider their residence to be rural.

Table 19: Place of Residence

	Pondera County	Statewide
In town (urban setting)	61%	58%
Out of town (rural setting)	39%	42%

TOURISM AND THE ECONOMY

The local economy and the role tourism and the travel industry should have in it were key issues addressed in the survey. Residents were asked how important a role they felt tourism should have in their community's economy. In addition, they were asked to rank industries on a scale from 1 (most desired) to 7 (least desired) indicating which they felt would be best for their community (Tables 20 and 21).

Pondera County: The majority (59%) of Pondera County respondents believe that the travel industry should have a role equal to other industries in the county economy, while 10 percent feel it should have a dominant role. Tourism/recreation ranked 5th behind agriculture/agribusiness, retail/wholesale trade, services, and manufacturing as the most desired economic development option for the county.

Statewide: Statewide respondents were slightly more positive about the role tourism should play in their local economy. Fifty-seven percent of statewide respondents feel that tourism should have a role equal to other industries, while 15 percent believe the industry should have a dominant role. When ranking tourism/recreation along with other industry segments according to economic desirability for their community, it placed 5th here as well, behind services, agriculture/agribusiness, retail/wholesale trade and manufacturing.

Table 20: Role of Tourism in the Local Economy

	Pondera County	Statewide
No role	3%	5%
A minor role	28%	23%
A role equal to other industries	59%	57%
A dominant role	10%	15%

Table 21: Most desired Economic Development

	Pondera County		Statewide	
	Rank	Mean*	Rank	Mean*
Agriculture/Agribusiness	1	2.09	2	3.00
Retail and Wholesale trade	2	2.75	3	3.12
Services	3	2.87	1	2.84
Manufacturing	4	3.84	4	3.87
Tourism/Recreation	5	3.90	5	3.99
Wood products	6	5.61	6	4.78
Mining	7	6.58	7	5.82

* Scores represent the mean of responses measured on a scale from 1 (most desired) to 7 (least desired).

DEPENDENCE ON TOURISM

Respondents were asked to what degree their place of work relied on tourists for its business (Table 22).

Pondera County: Only 3 percent of Pondera County respondents feel that their place of employment provides a majority of its products or services to tourists or tourist businesses. Forty percent feel they work in a place that provides some goods and services to tourists or tourist businesses.

Statewide: Six percent of statewide respondents feel their employer provides a majority of its products or services to tourists or tourist businesses, whereas the majority (54%) indicated they are employed by businesses that provide none of their products or services to tourists or tourist businesses.

Table 22: Employment's Dependency on Tourists for Business

	Pondera County	Statewide
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	3%	6%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	40%	40%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	57%	54%

INTERACTIONS WITH TOURISTS

The extent of interaction between tourists and residents affects the attitudes and opinions residents hold toward tourism in general. In turn, an individual's behavior is a reflection of those same attitudes and opinions. Respondents were asked questions to determine their level of interaction with tourists on a day-to-day basis, as well as the quality of those interactions (Tables 23 and 24).

Pondera County: When asked about their interactions with tourists, only 7 percent of Pondera County respondents indicated that they had frequent contact. Almost half (49%) reported that they have infrequent contact with tourists visiting Pondera County. Although the frequency of interaction is low, the vast majority of Pondera County respondents (72%) enjoy meeting and interacting with tourists when the occasion arises. Only 3 percent do not enjoy meeting and interacting with visiting tourists.

Statewide: Fourteen percent of statewide respondents reported having frequent contact with tourists visiting their community. Twenty-three percent indicated that they have somewhat frequent contact with tourists, and 36 percent said they have infrequent contact. Almost two-thirds of statewide respondents (65%) reported that they enjoy meeting and interacting with tourists. Twenty-eight percent are neutral to meeting and interacting with tourists, while 7 percent do not enjoy these interactions.

Table 23: Frequency of Contact with Tourists Visiting Community

Degree of Frequency	Pondera County	Statewide
Frequent Contact	7%	14%
Somewhat frequent contact	23%	23%
Somewhat infrequent contact	21%	27%
Infrequent contact	49%	36%

Table 24: Attitude Towards Tourists Visiting Community

Attitude	Pondera County	Statewide
Enjoy meeting and interacting with tourists	72%	65%
Indifferent about meeting and interacting with tourists	25%	28%
Do not enjoy meeting and interacting with tourists	3%	7%

COMMUNITY ATTACHMENT AND CHANGE

One measure of community attachment is the length of time and portion of life spent in a community or area. These statistics were reported earlier in the report (Table 14). Another measure is based on opinions that residents have about their community and perceived changes in population numbers (Tables 25, 26 and 27).

Respondents indicated their level of agreement with each of four statements on a scale from 1 (strongly disagree) to 4 (strongly agree). A response greater than 2.5 indicates agreement.

Pondera County: The Index of Community Attachment (i.e. the mean of four community attachment statements) indicates that Pondera County respondents are indeed attached to their community. An average rating of 2.8 shows these people like where they live. They were very positive in their feelings about their community, except in regard to opinions about the future. At 2.2, this item received a negative score, indicating that residents have very little confidence when it comes to the future of Pondera County.

Residents were also asked whether they perceive the population of Pondera County to be changing, and if so, how and at what rate. Over two-thirds of respondents (68%) feel that the county's population is decreasing, while 20 percent feel it is not changing at all. Another 12 percent feel the population is increasing. Of those who feel the county's population is decreasing, 72 percent think it is decreasing too fast, while 8 percent feel it is decreasing too slowly. Of those who feel the population of Pondera County to be increasing, over half (54%) feel it is occurring at the right rate, while 37 percent feel it is increasing too slowly.

Statewide: For respondents to the statewide survey, the Community Attachment Index produced a score of 3.1, higher than that of Pondera County. It is safe to say that Montana residents in general are attached to their communities. However, as was the case with Pondera County respondents, statewide respondents also rated the future of their community lower than the other items in the index. With a score of 2.6, it is barely positive.

On the statewide level, a mere 16 percent of respondents feel that the population in their community is unchanging. Sixty-three percent feel the population is increasing, while 21 percent feel it is decreasing. Of those who indicated that the population of their community is increasing, about half (51%) feel this is happening at the right rate. However, a full 45 percent feel this increase is occurring too fast. Of those who indicated that the population in their community is decreasing, the vast majority (89%) feels it is decreasing too fast. Eight percent are happy with the perceived rate of decrease, while 3 percent feel the rate of decrease is too slow.

Table 25: Community Attachment Statements

	Pondera County Mean*	Statewide Mean*
I'd rather live in my community than anywhere else.	2.8	3.1
If I had to move away from my community, I would be very sorry to leave.	2.8	3.1
I think the future of my community looks bright.	2.2	2.6
It is important that the residents of my community be involved in decisions about tourism.	3.3	3.4
Index of Community Attachment**	2.8	3.1

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

** Index score is the average of the mean scores for the four community attachment statements.

Table 26: Perceptions of Population Change*

	Pondera County	Statewide
Population is not changing	20%	16%
Population is increasing	12%	63%
Population is decreasing	68%	21%

* According to the MT Department of Commerce, CEIC, the population of Pondera County decreased by 2.9% between 1990 and 1999, and that of the state of Montana increased by 10.0% over the same time period.

Table 27: Rate of Population Change

	Pondera County	Statewide
If you feel the population in your community is <u>increasing</u>, how would you describe the change?		
Population is increasing too fast	9%	45%
Population is increasing at the right rate	54%	51%
Population is increasing too slowly	37%	4%
If you feel the population in your community is <u>decreasing</u>, how would you describe the change?		
Population is decreasing too fast	72%	89%
Population is decreasing at the right rate	20%	8%
Population is decreasing too slowly	8%	3%

CURRENT CONDITIONS OF, AND TOURISM'S INFLUENCE ON QUALITY OF COMMUNITY LIFE

The concept of “Quality of Life” can be broken down into several independent factors, including the availability and quality of public services, infrastructure, stress factors such as crime and unemployment, and overall livability issues such as cleanliness. When evaluating the potential for community tourism development, it is necessary to get an understanding for residents’ opinions of the current quality of life in their community, as well as how they think tourism will influence this.

To that end, respondents were asked to rate the current conditions of a number of factors that influence their quality of life by using a five-point scale ranging from 1 (very poor condition) to 4 (very good condition), in addition to a “Don’t know” option. They were also asked to rate the influence they thought increased tourism would have on these factors using a scale including “Positive Influence”, “Both positive and negative influence”, “Negative influence”, “No influence” and “Don’t know” (Tables 28 and 29).

Pondera County: Generally speaking, Pondera County respondents are satisfied with current quality of life variables in their county. The only two items to receive ratings of poor condition were job opportunities and museums and cultural centers. However, the majority of respondents (71% and 76%) indicated that they expect increased tourism development to have a positive influence on these variables.

Tourism development is also expected to have a positive influence on parks and recreation areas, but no influence on the education system. The majority of variables are expected to be influenced both positively and negatively by increased tourism.

Statewide: Overall, statewide respondents were less satisfied with the current condition of quality of life than Pondera County respondents. However, their ratings are similar, with emergency services receiving the most favorable score and job opportunities the least favorable.

Just as their Pondera County counterparts, statewide respondents expect tourism development to have a positive impact on museums and cultural centers, as well as on parks and recreation areas and job opportunities. The current level of traffic congestion is expected to be negatively influenced by increased tourism.

Statewide respondents indicated that they expect increased tourism to have both positive and negative impacts on most quality of life variables, including emergency services, community livability, safety from crime, cleanliness and appearance, local infrastructure, cost of living, and road and highway conditions.

Table 28: Quality of Community Life—Current Condition

	Pondera County Mean*	Statewide Mean*
Emergency services	3.6	3.2
Traffic congestion	3.6	2.8
Education system	3.4	3.0
Overall community livability	3.3	3.2
Safety from crime	3.3	3.1
Overall cleanliness and appearance	3.2	3.0
Parks and recreation areas	3.0	3.1
Conditions of roads and highways	2.8	2.5
Infrastructure	2.6	2.8
Cost of living	2.6	2.3
Museums and cultural centers	2.1	3.0
Job opportunities	1.8	2.0

* Scores represent mean responses measured on a scale from 1 (very poor condition) to 4 (very good condition). The higher the score, the better the perceived condition of the item.

Table 29: Quality of Community Life—Tourism’s Influence

	Pondera County*					Statewide*				
	No Influence	Negative Influence	Positive & Negative Influence	Positive Influence	Don't know	No influence	Negative Influence	Positive & Negative Influence	Positive Influence	Don't know
Emergency services	26%	2%	29%	28%	15%	17%	13%	38%	18%	14%
Traffic congestion	20%	24%	39%	10%	24%	7%	54%	25%	9%	5%
Overall community livability	16%	4%	39%	33%	4%	13%	13%	42%	23%	9%
Museums and cultural centers	5%	3%	8%	76%	8%	8%	2%	13%	70%	7%
Education system	38%	3%	19%	34%	3%	40%	8%	21%	19%	12%
Safety from crime	16%	21%	34%	16%	21%	13%	28%	40%	10%	9%
Parks and recreation areas	7%	4%	30%	56%	5%	6%	14%	32%	43%	5%
Overall cleanliness and appearance	14%	9%	35%	37%	9%	9%	20%	40%	23%	8%
Infrastructure	20%	15%	33%	20%	15%	26%	18%	28%	12%	16%
Cost of living	15%	12%	36%	28%	12%	13%	26%	30%	17%	14%
Conditions of roads and highways	18%	20%	24%	32%	20%	6%	29%	34%	25%	6%
Job opportunities	4%	3%	15%	71%	3%	10%	8%	25%	51%	6%

* Percentages may not add to 100 due to rounding.

In addition to tourism’s perceived influence on well-being, another method of measuring the degree of support for tourism development is to ask respondents questions specific to the tourism industry and about interactions with tourists. Respondents were asked to indicate their level of agreement or disagreement with a number of tourism-related statements. Responses ranged from 1 (strongly disagree) to 4 (strongly agree). As before, a score greater than 2.5 indicates agreement, while a score of less than 2.5 indicates disagreement. The statements deal with issues such as tourism support, tourism concerns and land use.

INDEX OF TOURISM SUPPORT

Some of the statements addressed general support for tourism development while others addressed more specific aspects of tourism (Table 30).

Pondera County: Almost all (91%) of Pondera County respondents agree that tourism promotion and advertising to out-of-state visitors by the state of Montana is a good idea, and would like to see this continued. A full 71 percent feel that their community is a good place for tourism investment, while 83 percent believe increased tourism will help their community grow in the right direction. Ninety-one percent of respondents also feel that the negative impacts of tourism are outweighed by its benefits. Almost two-thirds of Pondera County respondents (63%) feel that tourism promotion by the state benefits their county economically, while almost three-fourths (71%) believe that jobs in the travel industry offer opportunities for advancement. Sixty-three percent feel that the overall quality of life for Montana residents will improve with increased tourism. On the downside, a majority of respondents (66%) do not see a connection between increased tourism in their community or a more secure income for themselves, just as 72 percent do not think that increased tourism will lead to any financial benefit on their part.

Despite the apparent lack of personal economic benefit to respondents in Pondera County, they still support tourism development in the area because they feel it benefits their community. The Index of Tourism Support, i.e. the mean of the average score for each statement, equals 2.7, higher than the neutral point of 2.5. Clearly, there is considerable support for the travel industry in the county, a support that is obvious despite the perceived lack of personal benefit to residents.

Statewide: On the whole, statewide respondents are somewhat less supportive of tourism and the travel industry than Pondera County respondents are. The average score for each statement is consistently lower for statewide respondents than it is for Pondera County respondents, however, there is still an overall positive attitude regarding tourism development. Seventy-six percent support continued tourism promotion and advertisement to out-of-state visitors, while two-thirds (66%) agree that their community is a good place to invest in tourism development. Sixty percent think that increased tourism in the state will help their community grow in the right direction, and a full 69 percent feel that the overall benefits of tourism outweigh any negative impacts. Tourism promotion by the state of Montana is thought by seventy-two percent to benefit local communities economically, while 52 percent believe tourism jobs offer opportunity for advancement. However, 57 percent of statewide respondents worry that increased tourism in the state will not improve residents' quality of life.

Unfortunately, statewide respondents feel even more strongly that tourism development in their community will not influence them personally in an economic way. Sixty-nine percent do not see a connection between increased tourism and increased or more secure income for themselves, and seventy-two percent do not think they will benefit financially if tourism were to increase in their community.

The failure to recognize the connection between tourism development and personal benefit may be one of the main obstacles currently facing this type of development in the state, and also a reason for the neutral score on the Index of Tourism Support. It is worth to note that statewide respondents give positive responses to all the other topic-specific statements in the index.

Table 30: Tourism Support Statements

	Pondera County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	3%	6%	67%	24%	3.1	7%	17%	62%	14%	2.8
My community is a good place to invest in tourism development.	7%	22%	56%	15%	2.8	7%	27%	49%	17%	2.8
Increased tourism would help my community grow in the right direction.	4%	13%	63%	20%	3.0	9%	31%	47%	13%	2.6
The overall benefits of tourism outweigh the negative impacts.	3%	6%	75%	16%	3.0	10%	21%	58%	11%	2.7
Tourism promotion by the state of Montana benefits my community economically.	7%	30%	55%	8%	2.7	6%	22%	60%	12%	2.8
I believe jobs in the tourism industry offer opportunity for advancement.	6%	23%	62%	9%	2.7	12%	36%	47%	5%	2.5
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	4%	33%	58%	5%	2.6	13%	44%	39%	4%	2.4
If tourism increases in my community, my income will increase or be more secure.	15%	51%	26%	8%	2.3	22%	47%	25%	66%	2.1
I will benefit financially if tourism increases in my community.	16%	56%	22%	6%	2.2	24%	48%	22%	6%	2.1
Index of Tourism Support**	2.7					2.5				

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

** The Index of Tourism Support is the mean of the average score for each statement.

INDEX OF TOURISM CONCERN

The main issues of concern regarding tourism development deal with wage levels and crowding (Table 31).

Pondera County: Three-fourths (75%) of Pondera County respondents believe that most tourism jobs pay low wages. Almost half (47%) feel that tourists do not pay their fair share for the services they use, but only 35 percent agree that vacationing in Montana influences too many people to move to the state. However, the majority (71%) does not feel the state is becoming too crowded because of tourists, and only 25 percent feel that out-of-state visitors limit their access to recreation opportunities.

Despite concern over the wage issue, Pondera County respondents are not overly concerned when it comes to tourism development, as is indicated by a 2.4 score on the Index of Tourism Concern. In this index, a higher score means a higher level of concern, and Pondera respondents scored below the neutral point of 2.5, due in large part to the level of concern exhibited on the wage issue. However, ITRR estimates indicate that the average hourly wage for persons employed in the travel industry is \$8.47, well above minimum wage⁸.

Statewide: In the area of tourism concern, statewide respondents show a slightly more negative attitude than do Pondera County respondents. In this index, a higher score means a higher level of concern, and the statements score higher for statewide respondents across the board. Seventy-five percent feel that tourism jobs pay mostly low wages, while 55 percent feel that tourists do not pay their fair share for the services they use. The same percentage feels that a Montana vacation influences too many people to move to the state. However, the majority (59%) does not perceive the state as having a problem with crowding, and a full 67 percent do not see their recreation opportunities limited by the presence of out-of-state visitors.

With higher scores in all categories, it is no surprise that the Index of Tourism Concern is higher as well. At 2.6, it is marginally positive, indicating that there is indeed some concern regarding tourism development in the state as a whole.

Table 31: Tourism Concern Statements

						Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I believe most of the jobs in the tourism industry pay low wages.	2%	23%	64%	11%	2.9	2%	23%	53%	22%	2.9
Tourists do not pay their fair share for the services they use.	7%	46%	32%	15%	2.6	5%	40%	36%	19%	2.7
Vacationing in Montana influences too many people to move to the state.	10%	55%	30%	5%	2.3	5%	40%	32%	23%	2.7
In recent years, Montana is becoming overcrowded because of more tourists.	13%	58%	23%	6%	2.2	9%	50%	25%	16%	2.5
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	18%	57%	19%	6%	2.1	12%	55%	21%	12%	2.3
Index of Tourism Concern**	2.4					2.6				

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

** The Index of Tourism Concern is the mean of the average scores for each statement.

⁸ Dillon, Thale. 2000. Employment and Wages: The Travel Industry in Montana. Technical Report 2000-1, University Travel Research Program, School of Forestry, The University of Montana, Missoula, MT. 9pp.

LAND USE ISSUES

Montana has a rich land heritage that appeals to residents and visitors alike. A large part of Montana’s charm is related to its wide-open spaces, and residents are naturally sensitive with respect to how this resource is treated. Respondents were asked to express their agreement or disagreement to several statements related to land use issues, using the familiar 4-point scale (Table 32).

Pondera County: Eighty-seven percent of respondents agree that there is adequate undeveloped open space in the county, and only 29 percent worry about its potential disappearance. Seventy percent would support land-use regulations to manage growth in the county, while only 25 percent feel their access to recreation opportunities is limited due to the presence of out-of-state visitors.

Statewide: Among statewide respondents, 63 percent agree that there is adequate undeveloped open space in their community. Over half (58%) are concerned about its disappearance. Almost three-fourths (72%) of statewide respondents are would support some form of land-use regulations to control the types of future growth in their community. Only 33 percent feel their recreation opportunities are limited due to the presence of tourists.

Table 32: Land Use Issues

	Pondera County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
There is adequate undeveloped open space in my community.	4%	9%	67%	20%	3.0	7%	30%	49%	14%	2.7
I am concerned with the potential disappearance of open space in my community.	15%	56%	23%	6%	2.2	9%	33%	34%	24%	2.7
I would support land use regulations to help manage types of future growth in my community.	7%	23%	57%	13%	2.8	9%	19%	56%	16%	2.8
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	18%	57%	19%	6%	2.1	12%	55%	21%	12%	2.3

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

TOURISM-RELATED DECISION-MAKING

Residents have strong feelings about participating in decisions that will ultimately affect their community and their own lives. They were asked to respond to two statements related to who should be making decisions about tourism in their community. Again, a 4-point scale was used (Table 33).

Pondera County: Pondera County respondents feel strongly that residents should be involved in decision-making regarding local tourism development. Ninety-seven percent either agreed or strongly agreed that it is important that residents be involved in decisions about tourism, while fifty-nine percent disagreed that decisions regarding tourism volume are best left to the private sector.

Statewide: On a statewide level as well, most respondents (95%) feel strongly that residents should be involved in the decision-making process when it comes to tourism development. They are not as uniform when it comes to leaving decisions to the private sector: 61 percent disagree with the statement.

Table 33: Tourism-Related Decision-Making

	Pondera County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*
It is important that residents of my community be involved in decisions about tourism.	1%	2%	65%	32%	3.3	1%	4%	52%	43%	3.4
Decisions about how much tourism there should be in my community are best left to the private sector.	15%	43%	33%	9%	2.4	21%	40%	26%	13%	2.3

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

ADVANTAGES AND DISADVANTAGES TO TOURISM DEVELOPMENT

To further clarify the perceived benefits and costs of tourism development, respondents were asked what they thought would be the top advantage and disadvantage of increased tourism in their community. These were open-ended questions where respondents provided their thoughts in their own words. The responses were then assigned to general categories to facilitate comparison (Tables 34 and 35).

Pondera County: The top advantage of tourism identified by Pondera County respondents was overall economic benefit. Seventy percent of respondents indicated more jobs, higher income and higher revenue for local businesses as the top advantages. In terms of disadvantages, a full 27 percent feel that there are none associated with increased tourism, while 18 percent identify crowding/more traffic as the chief problem caused by tourism growth.

Statewide: Statewide respondents also identified improved economic conditions as being the top advantage of increased tourism in their community (73%). In terms of disadvantages, more traffic and crowding was of concern to a large portion of statewide respondents (38%), as was tourists moving to the state after visiting (10%).

Table 34: Advantages Associated with Increased Tourism

	Pondera County*	Statewide*
Economic benefit	70%	73%
Potential for growth	21%	9%
No advantage	4%	8%
Increased awareness	2%	2%
Increased population	2%	1%
More services available	--	2%
Cultural integration/learning	--	2%
Income from the bed tax	--	2%
Better roads	--	1%
Cleaner parks, recreation areas	--	1%

* Respondents could offer more than one suggestion.

Table 35: Disadvantage Associated with Increased Tourism

	Pondera County	Statewide
No disadvantage	27%	9%
Crowding/traffic	18%	38%
Increased crime	10%	7%
Decreased quality of life	9%	5%
Over-use/damage of scarce resources	7%	6%
Stress on local infrastructure	6%	4%
Abuse of facilities	5%	2%
Trespassing	5%	1%
Low-wage jobs	3%	2%
Tourists moving here	3%	10%
Increased cost of living	2%	4%
Economic dependency	2%	1%
Pollution/Noise pollution	--	3%
Tourists don't pay their fair share	--	3%
Litter	--	3%
Condition of roads	--	4%
Tourist dollars not returned to community	--	--
Seasonal	--	--
Increased use of drugs	--	--
Commercialization	--	1%

* Respondents could offer more than one suggestion.

QUESTIONS SPECIFIC TO PONDERA COUNTY

The Pondera County CTAP committee was given the opportunity to include questions specific to the region on the resident attitude questionnaire. The responses to these questions and other community-specific items are reported below.

PONDERA COUNTY CHARACTERISTICS

The following three items deal with characteristics, both positive and negative, of Pondera County. They were asked as open-ended questions to solicit residents' true feelings, and the answers reflect their own wording. The answers are used in the visioning part of the CTAP, where residents consider them when making development plans for the future (Tables 36, 37 and 38).

Valued characteristics of Pondera County: Respondents were asked what characteristics of Pondera County they value and would like to see continued into the future. At the top of the list were the neighborly/friendly/honest traits of those who live in the county (44%), but respondents also appreciate the natural beauty that surrounds them (22%) and the low crime rate in the county (14%).

Table 36: Valued Characteristics of Pondera County

Neighborly/friendly/honest	44%
Clean/beautiful/wide-open spaces	22%
Low crime/Safety	14%
Agriculture	11%
Supportive community	9%
Lake Frances recreation area	7%
Small-town atmosphere	7%
Quiet	6%
Low population	5%

*Respondents could give more than one answer.

Missing characteristics of Pondera County: Another facet of planning, in addition to learning what should be kept, is finding out what positive aspects that can be added to a community. In response to the question of what is missing from Pondera County that residents would like to see in the future, 23 percent answered "business growth". Another 18 percent would like to see more economic opportunity and job growth, while 17 percent want more retail stores.

Table 37: Characteristics Missing from Pondera County

Local business growth/loyalty to local businesses	23%
Economic opportunity/jobs	18%
Retail stores	17%
Attractions/advertising	13%
Cultural/recreational center	9%
Movies/entertainment	9%
Nice restaurants/fast-food places	9%
Youth activities	7%
Nice hotels	5%
Nothing is missing	3%
Open-minded people	3%
Population growth	3%
Cleanliness	2%
Improved roadways	2%
Pride in environment	2%

*Respondents could give more than one answer.

Disliked characteristics of Pondera County: Planning for desired conditions is one thing. One also has to be careful to avoid undesirable conditions. To that end, respondents were asked to identify what characteristics of Pondera County they dislike and would not like to see continued into the future. The primary concern turned out to be store closings and lay-offs (16%), but 15 percent indicated that they would like to be rid of the prevailing anti-business attitude in the area, and 12 percent are concerned about the declining economy. An additional 9 percent had no dislikes when considering Pondera County.

Table 38: Disliked Characteristics of Pondera County

Store closings/lay-offs	16%
Anti-business attitude/politics	15%
Declining economy	12%
Alcohol/drugs/gambling	11%
No dislikes	9%
Negative attitudes/prejudice	9%
Declining population	5%
Developments	4%
Selfish attitudes	4%
Increased traffic	3%
Crowding	3%
Poor-quality accommodations	3%
Low-wage jobs	3%

*Respondents could give more than one answer.

TOURISM DEVELOPMENT OF PONDERA COUNTY RESOURCES

One economic development strategy is to build on attractions that already exist. Pondera County respondents were asked to rate their support for development of a variety of tourism and recreation resources in the county in an effort to find out what would garner the most support. The rating scale used here included 1 (No development), 2 (Maintain for local use only), 3 (Limited development) and 4 (Intensive development).

In evaluating responses to this item, the average score for each site was computed. The sites with the highest scores are the ones that have the most community support for development. Primarily, Pondera County respondents support development of the recreation facilities at Tiber Dam⁹ and Lake Frances. Intensive development of these sites is supported by 51 and 56 percent, respectively. Another 48 percent support intensive development of Conrad's Whoop-Up Days (Table 39).

Table 39: Potential Development of Existing Pondera County Resources

	No additional development	Maintain for local use	Limited development	Intensive development	Average Score
Missile display	39%	6%	30%	25%	2.4
Auditorium/Performing arts center	13%	18%	35%	34%	2.9
Antique car museum (Conrad)	14%	6%	55%	25%	2.9
Whoop-Up Days	5%	18%	29%	48%	3.2
Frontier Town development	28%	7%	39%	26%	2.6
Heart Butte powwow	23%	23%	30%	24%	2.6
Boone & Crockett Ranch	42%	18%	27%	13%	2.1
Rock City	23%	20%	39%	18%	2.5
Turkey Track (Great Falls/Valier)	23%	5%	38%	34%	2.8
Site of Blackfeet/Lewis encounter (Fight Site)	17%	8%	52%	23%	2.8
Tiber Dam recreation facilities	2%	8%	39%	51%	3.4
Swift Dam County Park	7%	15%	44%	34%	3.0
Lake Frances recreation facilities	4%	5%	35%	56%	3.4
Arod Lake recreation facilities	21%	20%	45%	14%	2.5
Gallup City	45%	17%	32%	6%	2.0

⁹ Though Tiber Dam is located in Liberty County rather than Pondera County, it is still popular with Pondera County residents, and the county benefits from traffic generated by people driving through on their way to the dam.

LOCALLY SUGGESTED ATTRACTIONS

In an effort to identify more of the existing attractions in Pondera County, the resident attitude questionnaire solicited ideas from respondents regarding where they choose to take their friends and relatives when they come to visit. The question was open-ended and ideas were requested for each of Pondera County's distinct geographic areas: Heart Butte, Valier, Brady, Conrad, Dupuyer and Ledger. While the list in Table 40 offers a wide variety in terms of types of attractions, it is interesting to note the popularity of area's bars. Additionally, the observant reader will notice several mentions of Hutterite colonies. In fact, there are several of these colonies throughout Pondera County, and residents presumably visit all or most of them (Table 40).

Table 40: Locally Recognized Attractions

Heart Butte Area	
Powow	30%
Underground school	9%
New church	6%
Swift Dam	4%
Old church	4%
Indian Warrior statue	4%
Valier Area	
Lake Frances	70%
Rock City	34%
The Lighthouse	27%
Hutterite Colony	2%
Homestead Days	2%
DeBoo's Pine Ridge Ranch	1%
Ruth's Antiques	1%
Brady Area	
Arod Lake	18%
The Knees	4%
Dusty's	4%
Conrad Area	
Whoop-Up Days	20%
Pondera Golf Course	13%
Pool	12%
Missile sites	10%
The Rose Room	5%
Teepee rings	5%
Library	4%
Hutterite Colony	4%
Blue Sky Villa	3%
Dupuyer Area	
Swift Dam	61%
Inn Dupuyer	13%
Boone & Crockett Ranch	11%
Grizzly Days	6%
Ranger Bar	6%
Museum	5%
Hutterite Colony	3%
W. Jones Memorial Park	2%
Bear's Den Café	2%
Ledger Area	
Tiber Dam	57%
Missile Sites	14%

* Respondents could offer multiple answers for each area.

FAMILY-FRIENDLY ATTRACTIONS

Throughout the year, the towns of Pondera County host several sporting events which many family groups travel far to attend, both as spectators and as participants. However, these people rarely stay after the events are over. Some members of the CTAP committee have suggested that if these people were provided with more family-friendly attractions in the area, they may be persuaded to remain in the county for a longer period. One of the survey questions solicited ideas for family-friendly attractions from respondents. Again, this was an open-ended question where respondents provided their own ideas.

Twenty-two percent of respondents feel that the addition of nice over-night accommodation in Pondera County would encourage people to spend more time in the area. Nineteen percent think that this can be accomplished by adding family-friendly dining options, whereas 13 percent think that more amusements (specifically a water slide) would be enticing to families (Table 41).

Table 41: Family-Friendly Attractions

Nice motels (indoor pools, convention center, etc.)	22%
Family-friendly restaurants/fast-food places	19%
Amusements/Waterslide	13%
Shopping centers	8%
Youth center/Recreation center	7%
Antique car museum/Museum	7%
Further development of campgrounds and facilities	5%
Theaters	4%
More attractions	3%
Rodeo	3%
Golf course	1%
Night club	1%
Fire Hall on Lake Frances	1%
Increased parking	1%
Missile display	1%

* Respondents could offer more than one suggestion.

WEAKNESSES OF PONDERA COUNTY AS A TOURIST DESTINATION

The last county-specific question on the survey requested input in regards to potential weaknesses of Pondera County as a tourist destination. Close to one-third of respondents (31%) suggested that there are no attractions in the county that would bring visitors to the area, while 18 percent feel that it is the lack of advertisement that is the problem, rather than the lack of attractions. Seventeen percent blame the limited services available for the county's lack of tourists, while another 11 percent blame the attitude of local people (Table 42).

Table 42: Weaknesses of Pondera County as a Tourist Destination

No attractions to bring people to the area	31%
Not enough advertisement of local sites	18%
Limited services	17%
Attitude of local people	11%
Not a tourist destination	6%
Limited shopping	5%
No interest in developing attractions	4%
Road conditions	2%
Dry weather	1%
Cleanliness of eating areas	1%
Limited access to public lands	1%
Appearance	1%

* Respondents could provide more than one answer.

GENERAL COMMENTS

At the end of the survey, respondents were provided with space to include their own thoughts and comments. This was an open-ended format with no guidelines as to the topic of the comments, and thus they deal with a wide variety of issues (Table 43). A total of 15 respondents volunteered their comments.

Table 43: General Comments from Pondera County Respondents

Comments	
Conrad needs something exciting for people to stop and see.	35%
Tourism may help bring new ideas and stores to area.	17%
Don't want area to become like the Bitterroot or the Flathead.	6%
Locals drove out the building of new prison.	6%
Attractions need to be enjoyed by community as well as tourists.	6%
Pondera County has very few attractions to make people stop.	6%
Would like to see theater/auditorium in Conrad	6%
Tourism would negatively impact quality of life.	5%
Tourism is an important part of our economy.	5%
Tourism creates overcrowding in Glacier Park	5%
Restrictions keep new business out of Conrad.	

Appendix A:
Survey Instrument