

**Exploring Tourism Potential:
Resident Attitudes in
Missouri River Country, Montana**

Research Report 74

March 2000

Exploring Tourism Potential: Resident Attitudes in Missouri River Country, Montana

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EXECUTIVE SUMMARY

This report presents information about tourism in Missouri River Country, the tourism region comprised of Daniels, Garfield, McCone, Phillips, Richland, Roosevelt, Sheridan, and Valley counties. The report includes Missouri River Country residents' opinions and attitudes regarding tourism in their state and in their region, as well as estimated travel levels and traveler characteristics for the region. It also offers the results of a statewide resident attitude survey for comparative purposes.

A mail-back questionnaire was administered to a randomly selected sample of 500 residents of Missouri River Country during January and February 2000, and to a statewide sample of 1,000 Montana residents during November and December 1999. The initial mailing was followed by a reminder postcard one week later. Two weeks after that, those residents who had not yet responded were sent a replacement questionnaire.

NONRESIDENT VISITORS:

- In 1999, nearly 3.9 million travel groups visited Montana. Of those, approximately 529,000 (26%) traveled through Missouri River Country.
- Over \$1.58 billion was spent statewide in 1999 by nonresident travelers. This figure amounts to about \$1,800 for every Montana resident.
- In Missouri River Country, nonresident visitors spent close to \$52 million during 1999, or about \$1,180 per MRC resident.
- Travelers to Missouri River Country tended to stay in Montana longer than statewide visitors.
- While in Montana, visitors to Missouri River Country reported that the best source of travel information was people in motels, restaurants, gas stations, etc.
- Forty-one percent of visitors to MRC were in Montana primarily for vacation, and 24 percent were here primarily to visit family/friends.
- Travelers in Missouri River Country were attracted to Montana primarily because of Glacier National Park and the mountains.
- Visitors to Missouri River Country spent most of their money on retail shopping and gas.
- Missouri River Country visitors traveled primarily as couples (41%), but also as families (28%) and alone (22%).
- Overnight visitors to Missouri River Country were less likely to stay in hotels/motels than statewide visitors, but more likely to stay in the home of a friend/relative or at a campground.

RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:

- Respondents from Missouri River Country have resided in their communities for a longer time than the statewide sample, but in Montana for the same amount of time as the statewide sample.
- Almost three-fourths of Missouri River Country residents are native-born Montanans.
- Missouri River Country respondents feel tourism should have a role equal to other industries in the local economy, and ranked the tourism and recreation industry second on the list of opportunities for economic development.
- The majority of Missouri River Country respondents do not feel that they are economically dependent on tourism.
- Statewide residents have a stronger attachment to their community than do Missouri River Country respondents. Both groups are somewhat concerned about the future of their communities.
- Sixty percent of Missouri River Country respondents feel that the population in the region is decreasing too quickly.
- Missouri River Country respondents feel that the quality of life in their community can be enhanced by improving job opportunities, parks & recreation areas, as well as the condition of roads and highways.
- Missouri River Country residents largely agree that tourism will have a positive influence on museums & cultural centers, parks & recreation areas, and job opportunities.
- The respondents of Missouri River Country are generally positive about 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.
- Sixty-four percent of Missouri River Country respondents would support land-use regulation to control the type of future development in their community.
- Although Missouri River Country respondents think there is adequate undeveloped open space in their community, they are still concerned with its potential 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 the primary advantage of increased tourism in Missouri River Country, while crowding and increased crime are seen as the leading disadvantages.

CONCERNS OF MISSOURI RIVER COUNTRY RESIDENTS:

- Respondents agree that the Fort Peck Lake area should be targeted for both development and promotion to increase tourist visitation.
- Sixty percent of respondents were dissatisfied with current transportation conditions in Missouri River Country.
- The main cause for dissatisfaction with the transportation service was the poor bus service.
- Twenty-four percent of respondents feel that increased promotional efforts, especially on the Internet, will encourage visitors to spend more time in Missouri River Country.
- While Missouri River Country's natural beauty and scenery is seen as the leading strength of the region as a tourism destination, the great distances between sites are seen as its greatest weakness.

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INTRODUCTION

This report is intended to provide a comprehensive profile of current visitors and resident attitudes regarding tourism in Missouri River Country. Missouri River Country is one of Montana's six tourism regions, consisting of Daniels, Garfield, McCone, Richland, Roosevelt, Sheridan, and Valley counties.

The results of two different studies were used in the preparation of this report. First, nonresident visitor profiles for Missouri River Country and the state of Montana were developed using research conducted by ITRR during the summer of 1996. At that time, nonresident summer travelers to Montana were surveyed during a four-month study. A profile of Missouri River Country visitors was developed from the subset of surveys submitted by nonresident travelers passing through the region. For comparative purposes, both statewide and Missouri River Country visitor profiles are provided. Second, resident attitudes toward tourism were assessed using mail-back questionnaires obtained from households in Missouri River Country as well as in the state. The statewide survey was conducted in November and December 1999, whereas the Missouri River Country survey was conducted in January and February, 2000. Results from both samples are reported to provide a comparison between resident opinions toward tourism in Missouri River Country and in Montana as a whole.

The report is presented in two sections. The first section provides visitor profiles for Missouri River Country and Montana. The second section provides an assessment of resident attitudes towards tourism in Missouri River Country and Montana. The survey methodology and instrument used in this study were the same as that of the Community Tourism Assessment Process (CTAP) and the results presented here provide information for future tourism planning in the region. Funding for this research came from the Lodging Facility Use Tax.

SECTION I: THE NONRESIDENT TRAVEL STUDY

Data collected for this section of the report came from ITRR's 1996 Nonresident Summer Travel Study¹. A full copy of this study can be downloaded from the ITRR web site at www.forestry.umt.edu/itr.

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 the time. Specifically excluded from the study were those persons traveling in a plainly marked commercial or government vehicle such as a scheduled or chartered bus, or 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 statewide response rate of 45 percent. A sample of 819 respondent groups traveled through Missouri River Country in the summer of 1996 (Table 1).

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

	Statewide	Missouri River Country
Nonresident groups contacted	12,941	
Usable questionnaires returned	5,800	
Nonresident Travel Study response rate	45%	
Missouri River Country sample size		819
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. 113 pp.

A PROFILE OF CURRENT SUMMER VISITORS

I TRR 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 321,000, of those groups passed through the counties that comprise Missouri River Country, and that 23 percent, or 72,000, of those who traveled through spent at least one night there.

Group Characteristics

Travel group characteristics for Missouri River Country were obtained from visitors who spent at least one night in the region. There were some differences between the travel groups staying overnight in Missouri River Country and the statewide sample (Table 2).

Statewide: The average group size of 1999 Montana visitors was 2.6. Seventy-five percent of travelers had visited Montana before this trip. Most summer visitors to the state traveled as couples (38%), but almost as many traveled with family (34%). The largest portion of males was in the 30-49 years age bracket (31%), as was the largest portion of females (33%). The majority of summer visitors chose to spend their nights in a hotel/motel (59%), and stayed an average of 3 nights.

Missouri River Country: For travelers staying overnight in Missouri River Country, the average group size was 2.2, slightly smaller than for all Montana visitor groups. A full 88 percent were repeat visitors, and most traveled as couples (41%). The largest portion of males was in the 50-64 years age bracket (33%), as was the largest portion of females (33%). The typical traveler staying overnight in Missouri River Country spent 5 nights in the state, and was most likely to stay in a motel (47%) or at a campground (public, private or undeveloped) (52%).

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.

Table 2: Characteristics of Summer Nonresident Travelers

	MRC*	Statewide
Group Type		
Couple	41%	38%
Family	28%	34%
Alone	22%	17%
Friends	4%	7%
Family & Friends	3%	3%
Business Associates	2%	1%
Group or Club	--	--
Group Size	2.2	2.6
Have Visited Montana	88%	75%
Nights Spent in Montana	5	3
Overnight Accommodations Used While in Montana		
Home of friend, relative	35%	21%
Hotel, motel	47%	59%
Private campground	26%	18%
Public campground	23%	16%
Undeveloped camp	3%	4%
Resort, guest ranch	3%	5%
Condominium	--	1%
Other	2%	5%
Age of Males		
0-17 years old	11%	19%
18-29 years old	8%	10%
30-49 years old	27%	31%
50-64 years old	33%	24%
65+ years old	21%	16%
Age of Females		
0-17 years old	15%	18%
18-29 years old	7%	10%
30-49 years old	24%	33%
50-64 years old	33%	25%
65+ years old	21%	14%

Source: ITRR

*Characteristics of Montana visitors who stayed at least one night in Missouri River Country.

Visitors to the state as well as to Missouri River Country came from many different origins. While Washington and California figure prominently on both lists, visitors to Missouri River Country are more likely than the statewide sample to come from Minnesota, North Dakota or Wisconsin (Table 3).

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

Rank*	Missouri River Country**	Statewide
1	Washington	Washington
2	Minnesota	California
3	California	Idaho
4	North Dakota	Wyoming
5	Wisconsin	Colorado

Source: ITRR

*1=highest frequency

**Characteristics of Montana visitors who stayed at least one night in Missouri River Country.

Information Sources

During the sampling process, nonresident travel parties 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 most useful to them. A list of 11 information sources was included in the questionnaire.

Statewide: Forty percent of visitors did not use any of the listed sources prior to their trip. The 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 used prior to arriving in Montana were AAA (39%), travel guide books (19%), and the Montana Travel Planner (12%) (Table 5).

Visitors were also asked where they received travel information while *in* Montana. Travel information sources used most frequently were persons in motels, restaurants, gas stations, etc. (36%), highway information signs (35%), and brochure racks (33%) (Table 6). Visitors then indicated what 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 information centers (22%)(Table 7).

Missouri River Country: Forty-seven percent of overnight visitors to Missouri River Country did not use any of the 11 sources of information *prior* to travel. However, 26 percent used AAA, 22 percent used travel guide books, and 19 percent used the Montana Travel Planner (Table 4). The *most* useful source of travel information indicated by Missouri River Country overnight visitors included AAA (36%), the Montana Travel Planner (20%), and travel guide books (18%) (Table 5).

Fifty-two percent indicated that while *in* Montana, they obtained travel information from persons in motels, restaurants, gas stations, etc. Other prominent information sources were highway information signs (41%) and brochure racks (39%) (Table 6). Of those information sources used while *in* Montana, Missouri River Country overnight visitors indicated that the *most* useful were persons in motels, restaurants, gas stations, etc. (29%), persons in visitor information centers (24%), and highway information signs (22%) (Table 7).

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

	Missouri River Country*	Statewide*
None of the sources	47%	40%
AAA	26%	31%
Travel guide book	22%	22%
Montana Travel Planner	19%	13%
National Park brochure	18%	20%
1-800 State travel number	8%	7%
Chamber or visitor bureau	8%	7%
Information from private businesses	8%	7%
State Park brochures	6%	4%
Internet travel information	3%	5%
Regional travel number	1%	1%
Attending travel trade show	<1%	<1%

Source: ITRR

*Visitors could indicate more than one information source.

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

	Missouri River Country*	Statewide*
AAA	36%	39%
Montana Travel Planner	20%	12%
Travel guide book	18%	19%
Information from private businesses	7%	6%
National Park brochures	6%	11%
Chamber or visitor bureau	5%	5%
1-800 state travel number	5%	4%
None of the sources	2%	2%
Internet travel information	1%	3%
State Park brochures	--	1%
Regional travel number	--	--
Attending travel trade show	--	--

Source: ITRR

*Percentages may not add to 100 due to rounding.

Table 6: Sources of Information Used When *in* Montana

	Missouri River Country*	Statewide*
Person in motel, restaurant, gas station, etc.	52%	36%
Highway information signs	41%	35%
Brochure rack	39%	33%
Person in visitor information center	29%	26%
None of the sources	17%	24%
Other	17%	18%
Business billboards	12%	10%
Computer touch-screen info center	1%	--

Source: ITRR

*Visitors could indicate more than one information source.

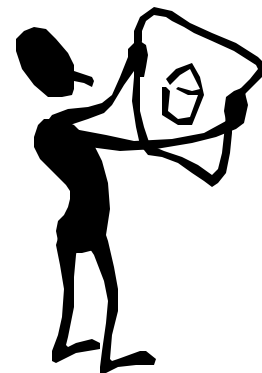
**“Other” sources
largely included
information from
friends and family.**

Table 7: *Most* Useful Source of Information Used When *in* Montana

	Missouri River Country*	Statewide*
Person in motel, restaurant, gas station, etc.	29%	24%
Person in visitor information center	24%	22%
Highway information signs	22%	19%
Other	12%	18%
Brochure rack	11%	15%
Business billboards	2%	2%
Computer touch-screen info center	--	--

Source: ITRR

*Percentages may not add to 100 due to rounding.



Purposes of Summer Trip

Nonresident travel parties 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).

Statewide: Over three-quarters of all sampled visitors indicated that vacation/recreation/pleasure was one reason for traveling to Montana. Other frequently cited reasons included passing through the state (31%) and visiting family/friends (31%).

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

Missouri River Country: Seventy-four percent of all overnight visitors to Missouri River Country indicated vacation/recreation/pleasure as one reason for their trip to Montana. Also frequently mentioned was visiting family/friends (44%), and passing through (28%).

Visitors staying overnight in Missouri River Country most frequently cited vacation/recreation/pleasure (41%) as their *primary* reason for visiting Montana. Visiting family/friends (24%) and passing through the state (22%) were also cited as *primary* reasons. With such a large portion of visitors in the region on their way to somewhere else, providing opportunities for drive breaks could be a way to capture some of these travelers. Marketing targeted to those who are in the area to visit family/friends could also be beneficial.

Table 8: Reasons for Traveling to Montana

	Missouri River Country		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	74%	41%	77%	49%
Visit family/friends	44%	24%	31%	16%
Passing through	28%	22%	31%	21%
Business	15%	8%	10%	6%
Recreational shopping	8%	1%	9%	1%
Necessity shopping	3%	--	4%	1%
Other	--	2%	4%	3%
Medical	--	--	2%	1%
Convention/meeting	2%	2%	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 check *all* pertinent attractions, and then indicate one *primary* attraction (Table 9).

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

Missouri River Country: Overnight vacationers to Missouri River Country were also attracted to Montana for many reasons. The top attractions to Montana mentioned included the mountains (48%), Glacier National Park (39%), open space (37%), and uncrowded areas (32%). The most frequently cited *primary* Montana attractions for overnight vacationers to Missouri River Country were Glacier National Park (39%) and the mountains (11%).

Table 9: Attraction of Montana as Vacation Destination

	Missouri River Country		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
<i>Mountains</i>	48%	11%	51%	12%
Yellowstone NP	25%	4%	39%	22%
<i>Rivers</i>	29%	2%	35%	1%
Glacier NP	39%	39%	31%	25%
<i>Open space</i>	37%	6%	31%	6%
Wildlife viewing	24%	1%	28%	2%
<i>Uncrowded areas</i>	32%	6%	27%	4%
Lakes	25%	2%	26%	1%
<i>Camping</i>	25%	4%	19%	2%
Friendly people	26%	6%	18%	3%
<i>National forest</i>	15%	--	15%	1%
Hiking	12%	--	15%	1%
<i>Fishing</i>	10%	1%	14%	6%
Historic sites	18%	1%	13%	2%
<i>Montana history</i>	21%	1%	11%	1%
Native Am. Culture	16%	3%	10%	1%
<i>Spec. attraction</i>	6%	4%	8%	6%
Wilderness area	9%	--	8%	1%
<i>N. Great Plains</i>	19%	2%	6%	--
Badlands	18%	3%	6%	1%
<i>State Park</i>	5%	--	6%	--
Special event	7%	3%	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 which statewide visitors and overnight visitors to Missouri River Country chose to participate in (Table 10).

Statewide: Wildlife viewing was the most popular activity among the statewide respondents (45%). Other popular activities included visiting family/friends (34%), nature photography (33%), recreational shopping (32%), day hiking (29%), and visiting historic/interpretive sites (29%).

Missouri River Country: Visiting family and friends topped the list of recreational activities participated in by overnight visitor to Missouri River Country (41%). Wildlife viewing (38%) was also popular, as was camping in developed areas (32%) and nature photography (31%). Twenty-four percent of visitors were involved in visiting historic and interpretive sites, which is good news in light of the upcoming Lewis & Clark Bicentennial celebrations.

Table 10: Recreational Activity Participation

	Missouri River Country*	Statewide*
Visiting family/friends	41%	34%
Wildlife viewing	38%	45%
Camping, developed area	32%	28%
Nature photography	31%	33%
Historic/interpretive sites	24%	29%
Picnicking	24%	26%
Visiting museums	22%	21%
Recreational shopping	21%	32%
Day hiking	17%	29%
Visiting Native American sites	15%	10%
Nature studies	13%	9%
Gambling	12%	10%
Fishing	10%	15%
Swimming in pools	10%	14%
Camping, primitive areas	10%	10%
Special events/festivals	10%	8%
Swimming in natural areas	6%	7%
River rafting/floating	5%	6%
Golfing	3%	5%

Source: ITRR

*Visitors could indicate more than one activity.

Economic Characteristics

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

I TRR staff estimated that 3,898,000 travel groups visited Montana in 1999. Of those nearly 3.9 million travel groups, approximately 529,000 (14 %) passed through Missouri River Country.

Statewide: Nonresident visitors spent close to \$1.6 billion in the state during 1999. This amounted to about \$1,800 per person living in the state.

Missouri River Country: Nonresident spending in Missouri River Country totaled \$51,745,000 in 1999, or about 3 percent of all nonresident spending in Montana. Nonresidents spent the equivalent of \$1,183 per person in the tourism region.

There are some differences in expenditure distribution patterns between statewide visitors and Missouri River Country visitors. Most notably, the expenditure categories of lodging/campgrounds, groceries/snacks, and retail sales varied greatly between the two groups. Statewide visitors spent almost three times as much, percentage-wise, on lodging or campgrounds as did Missouri River Country visitors. However, the latter group spent considerably more on groceries and snacks, and on retail goods. It is possible that they made up for what they did not spend on lodging by spending more on groceries and retail goods.

Table 11: Expenditures by Nonresident Travelers in Missouri River Country

Distribution of Expenditures:	Missouri River Country	Statewide
Lodging, campgrounds, etc.	6%	17%
Auto rental and repair, transportation	1%	4%
Gas and oil	23%	22%
Restaurant, bar	17%	18%
Groceries, snacks	13%	8%
Retail sales	35%	24%
Miscellaneous services	6%	6%
Total travel groups to sample area, 1999	529,000	3,898,000
Total expenditures in sample area, 1999 (\$1999)	\$51,745,000	\$1,587,800,000
Per capita expenditures in sample area (\$1999) ³	\$1,183	\$1,803

Source: ITRR

³ MT Department of Commerce, Census and Economic Information center. Data set "Montana Estimates of the Population of Counties and Places: Annual Time Series, July 1, 1991 to July 1, 1998". Accessed at www.com.mt.us/ceic

SECTION II: THE MONTANA RESIDENT ATTITUDE STUDY

Data for this section of the report came from the ITRR Resident Attitude Study conducted in Missouri River Country during January and February 2000. A copy of the survey instrument can be found in Appendix A.

METHODOLOGY

A mail-back questionnaire was administered to a randomly selected sample of 500 residents of Missouri River Country, as well as to a statewide sample of 1,000 Montana residents. The statewide survey was carried out in November and December 1999. In Missouri River Country, questionnaires were distributed to the eight counties (Daniels, Garfield, McCone, Phillips, Richland, Roosevelt, Sheridan and Valley counties) in proportion to their respective populations. One week after the initial mailing of the questionnaire, a reminder postcard was sent to all survey households. After an additional two weeks, a replacement questionnaire was mailed to those who had not yet responded.

A non-response bias check was not conducted at the conclusion of the sampling effort. Such bias checks are generally conducted in the form of a telephone interview to determine if those in the sample population 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 between respondents and non-respondents involved statements of support for tourism development. These key questions could only be answered after considering other questions asked in the survey, and 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 represent the opinions of only 23 percent of the Missouri River Country 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, 1998 Montana census estimates of age groups⁴, responses were adjusted to more closely reflect the population of Missouri River Country residents. Results presented reflect the adjusted data set.

Table 12: Sample Sizes and Response Rates

	Missouri River Country	Statewide
Resident questionnaires mailed out	500	1,000
Undeliverables	27	105
Usable resident questionnaires returned	111	244
Resident Attitude Study response rate	23%	27%

⁴ MT department of Commerce, Census and Economic Information Center. Data set CO-98-13, "Population estimates for counties by age group: July 1, 1998". Accessed at www.com.state.mt.us/ceic

MISSOURI RIVER COUNTRY 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 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 effects of tourism. Attitudes and opinions are good measures for determining the level of support for community and industry actions. The resident opinion questionnaire addressed topics that provide a picture of perceived current conditions and tourism's role in the community.

Respondent Characteristics

Age and gender, as well as length of residence in the state and in Missouri River Country 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).

Statewide: Forty-four percent of respondents to the statewide survey were male⁵, and the average age was 51 years, with respondents ranging in age from 19 to 88 years.

Missouri River Country: Fifty percent of respondents from Missouri River Country were female⁶. Respondents averaged 56 years of age, and ranged in age from 22 to 95 years.

Table 13: Respondents Age and Gender Characteristics

	Missouri River Country	Statewide
Average Age	56 years	51 years
Minimum age	22 years	19 years
Maximum age	95 years	88 years
Percent male	50%	44%
Percent female	50%	56%

⁵ According to the MT department of Commerce, CEIC, the ratio of males to females in the state of Montana is approximately 50/50.

⁶ The actual ratio of males to females in Missouri River Country is approximately 50/50.

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 community (Tables 14 and 15).

Statewide: Exactly half of statewide survey respondents were native Montanans. On average, they had lived in their community for 21 years and in the state for 47 years. Ninety-two percent of respondents' lives were spent in the state. Seventeen percent of respondents had lived in their communities longer than 40 years, while 35 percent had lived in their community 10 years or less.

Missouri River Country: A full 72 percent of Missouri River Country respondents were born in Montana. On average, they had lived in their community for 41 years, or 73 percent of their lives, and in the state for 47 years, or 84 percent of their lives. Forty-three percent of respondents had lived in Missouri River Country longer than 40 years, and 5 percent had lived in the region 10 years or less.

Table 14: Residency Characteristics

	Missouri River Country	Statewide
Born in Montana	72%	50%
Mean years lived in community	41 years	21 years
Mean years lived in Montana	47 years	47 years
Age (mean years)	56 years	51 years
Percentage of life spent in community	73%	41%
Percentage of life spent in state	84%	92%

Table 15: Community Residency

	Missouri River Country	Statewide
10 years or less	5%	35%
11 to 20 years	10%	23%
21 to 30 years	28%	15%
31 to 40 years	14%	10%
41 to 50 years	18%	8%
51 to 60 years	8%	5%
61 years or more	17%	4%

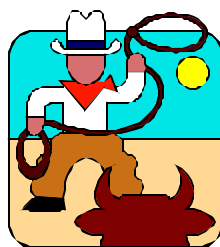
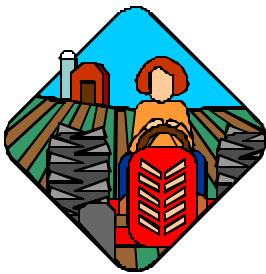
Employment Status: A person’s employment status, type of job, and work sector can all influence personal wellbeing and support for tourism. In general, the more dependent a person is financially on the tourism industry, the greater the support for tourism (Table 16).

Statewide: Professionals made up the largest group of respondents to the statewide survey, comprising 28 percent of those responding. Retirees made up the second largest group of respondents (18%). No other employment category was represented by more than 8 percent.

Missouri River Country: Retirees (24%) and professionals (18%) were the two largest employment categories among Missouri River Country respondents, followed by farmers/ranchers (15%). Farmers/ranchers made up three times the proportion of statewide respondents reporting to be farmers/ranchers.

Table 16: Employment Status

	Missouri River Country	Statewide
Retired	24%	18%
Professional	18%	28%
Farmer/rancher	15%	5%
Clerical	8%	5%
Sales	6%	3%
Self-employed	6%	8%
Laborer	5%	5%
Homemaker	5%	5%
Managerial	4%	2%
Craftsman	1%	7%
Operative	1%	<1%
Service worker	1%	5%
Farm/ranch laborer	1%	--
Armed services	--	--
Transport	--	<1%
Student	--	5%
Unemployed/Disabled	--	2%



Place of Residence: Residents were asked to indicate if they lived in town or out of town (Table 17).

Statewide: Over half (54%) of statewide respondents indicated that they live in town. Residents from rural areas made up 46 percent of the respondents.

Missouri River Country: Over one-third (36%) of Missouri River Country respondents indicated that they live out of town, leaving 64 percent who consider their residence to be “in town”.

Table 17: Place of Residence

	Missouri River Country	Statewide
In town	64%	54%
Out of town	36%	46%

Tourism and the Economy

The local economy and the role tourism 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 ranked industries on a scale from 1 (best) through 7 (worst) indicating which they believed offered the best opportunity for future economic growth (Tables 18 and 19).

Statewide: The majority of respondents (57%) believe that tourism should play a role equal to other industries in their local economy, while 27 percent think tourism should play a relatively minor role. Tourism ranked fourth behind agriculture/agribusiness, retail & wholesale trade, and services as offering the best opportunity for economic development.

Missouri River Country: The same proportion of Missouri River Country residents (57%) feel tourism should have a role equal to other industries in the local economy. Only 8 percent think tourism should have a dominant role. When ranking tourism along with other industry groups according to economic importance for Missouri River Country, tourism placed second, following agriculture/agribusiness.

Table 18: Role of Tourism in Local Economy

	Missouri River Country	Statewide
No role	3%	1%
A minor role	32%	27%
A role equal to other industries	57%	57%
A dominant role	8%	15%

Table 19: Best Opportunity for Economic Development

	Missouri River Country		Statewide	
	Rank	Mean*	Rank	Mean*
Agriculture/agribusiness	1	1.89	1	3.07
Tourism/recreation	2	2.95	4	3.66
Retail & wholesale trade	3	3.10	2	3.19
Services	4	3.41	3	3.36
Manufacturing	5	4.06	5	3.81
Mining	6	5.86	7	5.67
Wood products	7	5.87	6	5.00

*Scores represent mean responses measured on a scale from 1 (best opportunity) to 7 (worst opportunity).

Dependence on Tourism

Several questions were designed to determine the extent to which respondents feel they are dependent upon the tourism industry. They were asked to indicate the degree to which they were dependent on tourism for both their jobs and their income (Tables 20 and 21).

Statewide: Nine percent of respondents indicated that their job is very dependent on tourism, while almost three-fourths of all statewide respondents felt that their job is not at all dependent on tourism. Less than one percent indicated that 76-100 percent of their income depends on tourism, while 73 percent said that none of their income is tourist-dependent.

Missouri River Country: Close to three-fourths (71%) of Missouri River Country respondents believe they are not at all dependent on the tourism industry for their job. A full 76 percent indicated that none of their income is dependent on the tourism industry, while only 1 percent feels that 76-100 percent of their income is derived from it. As with the statewide sample, the perception among Missouri River Country respondents is that they do not rely to any large degree on the tourism industry for either employment or income.

Table 20: Job Dependency

	Missouri River Country	Statewide
Not at all dependent	71%	73%
Somewhat dependent	26%	18%
Very dependent	3%	9%

Table 21: Income Dependency

	Missouri River Country	Statewide
None at all	76%	73%
1%-25%	20%	17%
26%-50%	3%	6%
51%-75%	--	3%
76%-100%	1%	<1%

Interactions with Tourists

The extent of interactions 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 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 interactions with tourists, 19 percent indicated that they had regular contact, and 29 percent reported having somewhat frequent contact with tourists. An additional 35 percent indicated that they had infrequent contact with tourists. Only eight percent of respondents make an effort to avoid tourists in their community, while 62 percent report trying to make visitors feel welcome.

Missouri River Country: Thirty-eight percent of respondents indicated that they have regular or somewhat frequent contact with tourists. A full 18 percent reported that they almost never interact with tourists. Close to eighty percent tries to make visitors feel welcome in the community, while only three percent try to avoid them. This indicates that the region could benefit from increased contact between residents and visitors.

Table 22: Interactions with Tourists

	Missouri River Country	Statewide
Regular	8%	19%
Somewhat frequent	30%	29%
Infrequent	44%	35%
Almost never	18%	17%

Table 23: Resident Behavior Toward Tourists

	Missouri River Country	Statewide
Make them feel welcome	79%	62%
No specific reaction	18%	30%
Try to avoid them	3%	8%

Community Attachment and Change

One measure of community attachment is the length of time and percentage of life spent in a community or area. Length of residence was reported earlier in the report (Table 14). Another measure is based on opinions that residents have about their community and perceived changes in population numbers (Tables 24 and 25).

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

Statewide: The Index of Community Attachment (i.e. the mean of the four community attachment statements) indicates that statewide respondents are quite attached to their communities. An average rating of 3.10 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.

Residents were asked whether they perceive the population of their community to be changing and if so, at what rate. Statewide, 69 percent of respondents felt the population of their county is growing. Thirteen percent reported that it is decreasing. Of those who felt the population is changing, over half feel it is changing too fast, while 38 percent feel it is changing at about the right rate⁷.

In summary, respondents around Montana are attached to their communities in spite of the fact that they feel they are growing too fast. However, Montana residents are a little uncertain about the future of their communities.

Missouri River Country: The Index of Community Attachment for Missouri River Country, although lower than for the statewide sample, is positive, indicating that residents feel attached to their community. Like the statewide sample, Missouri River Country respondents gave the lowest score to the statement regarding the future of their community. At 2.51, it is barely positive and lower than that for the state as a whole. This may suggest that there is some concern about the future economic stability of the region. On the other hand, responses to the remaining three statements indicate that Missouri River Country residents rather like where they live and want to be involved in decisions regarding their community.

Only 16 percent of respondents feel that the population of the region is increasing, a sentiment opposed by 60 percent of the sample. Twenty-four percent feel that the population of their community is not changing at all⁸. Regardless of how it is changing, the majority of respondents feel the population is changing too fast.

⁷ The population of the state of Montana increased by 10.1 percent between July 1990 and July 1998. By comparison, the population of the United States increased by 8 percent during the same time period.

Sources: U.S. Census and MT Department of Commerce, Census and Economic Information Center. Data set "Montana Estimates of the Population of Counties and Places: Annual Time Series, July 1, 1991 to July 1, 1998". Accessed at www.com.mt.us/ceic

⁸ The population of Missouri River Country decreased by 4.3 percent between July 1990 and July 1998. Source: Ibid.

Table 24: Community Attachment Statements

	Missouri River Country Mean*	Statewide Mean*
It is important that the residents of my community be involved in decisions about tourism.	3.48	3.36
If I had to move away from my community, I would be very sorry to leave.	3.19	3.30
I'd rather live in my community than anywhere else.	2.90	3.08
I think the future of my community looks bright.	2.51	2.67
Index of Community Attachment	3.02	3.10

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

Table 25: Perceptions of Population Change

	Missouri River Country	Statewide
How is the population changing in your community?		
Growing	16%	69%
Decreasing	60%	13%
Not changing	24%	18%
If population is changing, is it changing . . .		
Too fast?	53%	59%
About right?	35%	38%
Too slowly?	11%	3%

Current Conditions of and Tourism's Influence on Quality of Community Life

When evaluating the potential for community tourism development, it is necessary to gain an understanding for residents' opinions of the current quality of life in their community and how they perceive tourism will influence this. A number of factors contribute to the quality of life in any community, including the availability and quality of public services, infrastructure, stress factors 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 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 tourism would have on these current conditions on a scale including "Positive influence", "Both positive and negative influence", "Negative influence", "No influence" and "Don't know" (Tables 26 and 27).

Statewide: On a statewide level, respondents feel that overall community livability, quality of emergency services, and parks & recreation areas are in good to very good condition. Respondents indicated that they do not expect tourism to have much of an effect, positive or negative, on these factors. However, respondents also indicated that museums and cultural centers are in good condition and that tourism is expected to have a strongly positive influence in this area.

On the other hand, statewide respondents indicated that roads and highways, cost of living, and traffic congestion are in poor condition, and that tourism is perceived to have a strongly negative influence on these factors.

Both infrastructure and the educational system were considered to be in good condition, but tourism is thought to have no significant influence here.

Missouri River Country: Overall, Missouri River Country respondents are more satisfied with the quality of life factors than is the statewide sample. Traffic congestion, safety from crime, and overall community livability are considered to be in good to very good condition. Tourism’s influence on these factors is expected to be both positive and negative. While job opportunities received the poorest rating, residents were most likely to rate tourism’s influence here as positive, if any influence was expected at all. Tourism is expected to have a positive influence on parks and recreation areas, as well as on museums and cultural centers. These factors are currently considered to be in good condition.

Missouri River Country respondents join the statewide sample in their favorable rating of the education system, and also agree that tourism will have no influence in that area. No item received a majority of votes in the category for negative influence.

Table 26: The Quality of Community Life

	Missouri River Country Mean*	Statewide Mean*
Traffic congestion	3.46	2.62
Safety from crime	3.37	3.07
Overall community livability	3.20	3.26
Emergency services	3.17	3.20
Education system	3.14	3.00
Museums and cultural centers	3.01	3.08
Cost of living	2.87	2.30
Infrastructure	2.87	2.78
Overall cleanliness and appearance	2.87	3.02
Parks and recreation areas	2.85	3.09
Conditions of roads and highways	2.64	2.59
Job opportunities	1.98	2.25

*Scores represent mean responses measured on a scale from 1 (very poor condition) to 4 (very good condition).

Table 27: Influence of Tourism on Quality of Life Variables

	Missouri River Country					Statewide				
	<i>No influence</i>	<i>Negative Influence</i>	<i>Positive & Negative Influence</i>	<i>Positive Influence</i>	<i>Don't know</i>	<i>No influence</i>	<i>Negative Influence</i>	<i>Positive & Negative Influence</i>	<i>Positive Influence</i>	<i>Don't know</i>
Traffic congestion	12%	22%	39%	23%	4%	12%	56%	17%	9%	6%
Safety from crime	16%	23%	29%	24%	8%	21%	23%	32%	9%	15%
Overall community livability	12%	8%	43%	30%	7%	25%	10%	42%	13%	10%
Emergency services	21%	5%	36%	19%	19%	28%	9%	28%	12%	23%
Education system	34%	5%	29%	18%	14%	50%	9%	19%	7%	15%
Museums and cultural centers	1%	3%	13%	76%	7%	7%	1%	16%	61%	15%
Cost of living	15%	18%	36%	20%	11%	19%	34%	27%	8%	12%
Infrastructure	22%	14%	30%	15%	19%	30%	23%	22%	7%	18%
Overall cleanliness and appearance	7%	16%	37%	35%	5%	14%	17%	40%	21%	8%
Parks and recreation areas	5%	9%	35%	45%	6%	10%	16%	40%	27%	7%
Conditions of roads and highways	8%	22%	34%	27%	9%	14%	32%	35%	12%	7%
Job opportunities	10%	11%	28%	36%	15%	23%	13%	28%	25%	11%

In addition to tourism’s perceived influence on wellbeing, another method of measuring the degree of support for the tourism industry is to ask respondents questions specific to the tourism industry and about their interactions with tourists. Respondents were asked to indicate the level of agreement or disagreement with a number of tourism-related questions. Responses ranged from 1 (strongly disagree) to 4 (strongly agree). As before, a score of 2.5 or more indicates a positive opinion.



Support for Tourism Development

Some questions addressed general support for tourism development while others addressed more specific aspects of tourism (Table 28).

Statewide: Almost two-thirds (63%) of respondents believe that their community is an attractive place for investing in tourism development. Forty-nine percent believe that tourism would help their community grow in the “right” direction. Seventy-four percent believe that tourism promotion by Montana benefits their community. Nearly three-fourths (73%) support continued tourism promotion by Montana. Fewer respondents believe that they would see personal financial benefit if their community were to see increased tourism, with only 24 percent responding positively. Sixty-three percent of respondents feel that the benefits of tourism outweigh the negative effects. Finally, about one-third (35%) of respondents feel that increased tourism would result in increased quality of life in their community.

Missouri River Country: Compared to the statewide sample, respondents from Missouri River Country are more positive in all areas concerning tourism development. They agree that tourism promotion by the state benefits their communities economically, and support continued tourism promotion out of state. Furthermore, respondents feel that the overall benefits of tourism outweigh any negative impacts. They also believe 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. While Missouri River Country respondents agree that increased tourism would improve the quality of life for Montanans, they do not feel that they will experience any personal financial benefit from increased tourism in their community.

Table 28: Support for Tourism Development

	Missouri River Country					Statewide				
	Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score*	Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score*
Tourism promotion by Montana benefits my community economically.	24%	60%	14%	2%	3.06	12%	62%	19%	7%	2.80
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	33%	56%	8%	3%	3.19	15%	58%	15%	12%	2.77
The overall benefits of tourism outweigh the negative impacts.	17%	65%	16%	2%	2.97	8%	55%	25%	12%	2.59
Increased tourism would help my community grow in the right direction.	25%	57%	16%	2%	3.06	12%	37%	34%	17%	2.45
If tourism increases in Montana, the overall quality of life for Montana resident will improve.	11%	51%	33%	5%	2.68	5%	30%	45%	20%	2.20
My community is an attractive place to invest in new tourism development.	22%	58%	17%	3%	3.00	12%	51%	27%	10%	2.65
I will benefit financially if tourism increases in my community.	9%	25%	49%	17%	2.25	7%	17%	43%	33%	1.97

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

Concerns about Increased Tourism

Residents of a community may become concerned about changes that will impact the lifestyle they have become accustomed to. 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. Again the 4-point scale was used (Table 29).

Statewide: Over three-fourths (76%) of Montanans surveyed would support land-use regulations to control future growth in their community. Over two-thirds (70%) of respondents agree that vacationing in Montana influences too many people to move here. In light of this, 56 percent feel the state is becoming too crowded by tourists.

Missouri River Country: Sixty-four percent of Missouri River Country respondents would support land-use regulations to help control the type of future growth in their community. Unlike their statewide counterparts, Missouri River Country respondents do not agree that too many people move to Montana after having vacationed here, and they generally do not feel the state is becoming too crowded due to tourists in recent years.

Table 29: Concerns Regarding Increased Tourism

	Missouri River Country					Statewide				
	<i>Strongly Agree</i>	<i>Agree</i>	<i>Disagree</i>	<i>Strongly Disagree</i>	<i>Average Score*</i>	<i>Strongly Agree</i>	<i>Agree</i>	<i>Disagree</i>	<i>Strongly Disagree</i>	<i>Average Score*</i>
I would support land-use regulations to help control the type of future growth in my community.	18%	46%	26%	10%	2.70	28%	48%	16%	8%	2.95
Vacationing in Montana influences too many people to move to Montana.	12%	30%	50%	8%	2.46	32%	38%	27%	3%	2.99
In recent years, the state is becoming overcrowded because of more tourists.	6%	22%	60%	12%	2.23	22%	34%	36%	8%	2.78

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

Concerns Regarding 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 to how this resource is treated. Subjects were asked to express their agreement or disagreement to several statements related to land use issues, using the familiar 4-point scale (Table 30).

Statewide: Sixty-two percent of respondents agreed that there was adequate undeveloped open space in their community. Nearly three-fourths (72%) were concerned about the potential disappearance of open space. Only 36 percent of respondents feel that their access to recreation opportunities is limited due to the presence of out-of-state visitors.

Missouri River Country: The vast majority (87%) of Missouri River Country residents believes there is adequate undeveloped open space in the region, but show some concern about its potential disappearance (56%). They agree with the statewide sample in that the presence of tourists does not limit their access to recreation opportunities (77%).

Table 30: Land Use Issues

	Missouri River Country					Statewide				
	<i>Strongly Agree</i>	<i>Agree</i>	<i>Disagree</i>	<i>Strongly Disagree</i>	<i>Average Score*</i>	<i>Strongly Agree</i>	<i>Agree</i>	<i>Disagree</i>	<i>Strongly Disagree</i>	<i>Average Score*</i>
There is adequate undeveloped open space in my community.	26%	61%	11%	2%	3.11	16%	46%	23%	15%	2.62
I am concerned about the potential disappearance of open space in my community.	21%	35%	35%	9%	2.67	44%	28%	22%	6%	3.11
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	7%	16%	63%	14%	2.15	11%	25%	54%	10%	2.37

*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. Residents were asked to respond to two statements related to who should be making decisions about tourism development. Again, the 4-point scale was used (Table 31).

Statewide: Respondents feel strongly that residents should be involved in decision-making regarding local tourism development. Ninety-three percent of respondents either agreed or strongly agreed with the statement “It is important that residents of my community be involved in decisions about tourism”, while sixty-one percent disagreed that decisions regarding tourism should be left to the private sector.

Missouri River Country: Like their statewide counterparts, Missouri River Country respondents feel strongly that decision-making regarding tourism development in the region should include input from the residents (98%), but are not as uniform in their disagreement that these decisions should be left entirely to the private sector (54%).

Table 31: Tourism-related Decision-making

	Missouri River Country					Statewide				
	Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score*	Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score*
It is important that residents of my community be involved in decisions about tourism.	49%	49%	2%	--	3.48	43%	50%	6%	1%	3.36
Decisions about how much tourism there should be in my community are best left to the private sector.	14%	32%	36%	18%	2.42	13%	26%	34%	27%	2.26

*Scores represent mean 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 own thoughts and wording. The responses were then assigned to general categories to facilitate comparison (Tables 32 and 33).

Statewide: The top advantage given by statewide respondents was overall economic benefit. Ninety-six percent of the sample indicated more jobs, higher income and higher profits for local businesses as the top advantages. Congestion/crowding tops the list of disadvantages.

Missouri River Country: As with the statewide sample, improved economic conditions were viewed as the primary benefit of increased tourism (83%). Crowding (20%), followed by increased crime (13%), were the most frequently noted disadvantages of increased tourism in Missouri River Country. Appendix B contains a complete list of Missouri River Country responses.

Table 32: Top Advantages of Increased Tourism

	Missouri River Country*	Statewide
Economic benefit (more income, more jobs, more profit, etc.)	83%	96%
No benefit/no advantage	8%	11%
Increased population	4%	--

*Represents the responses of 75 residents. Respondents could offer more than one suggestion.

Table 33: Top Disadvantages of Increased Tourism

	Missouri River Country*	Statewide
Too many people/crowding	20%	51%
Increase in crime rate	13%	6%
No disadvantage	13%	7%
Tourists	9%	--
Overuse of natural resources	7%	8%
Tourists don't take care of things	7%	--

*Represents responses from 69 residents. Respondents could offer more than one suggestion.

General Tourism Issues

Missouri River Country residents were also asked to share their views on some issues dealing with attitudes towards tourism in general (Table 34).

Statewide: The respondents to the statewide survey largely agree with all the statements presented. Eighty percent agree that tourism increases opportunities to learn about other people and cultures. However, 63 percent feel that tourists do not pay their fair share for services they use, and 70 percent agree that most of the jobs in the tourism industry pay low wages.

Missouri River Country: Missouri River Country residents have the same feelings about the presented statements, as do the statewide respondents. Over half of respondents agree that tourists do not pay their fair share for the services they use. Seventy-eight percent think that jobs in the tourism industry are mostly low-paying. Over three-fourths of respondents feel that tourism provides opportunities to learn about other people and cultures.

Table 34: General Tourism Attitude Issues

	Missouri River Country				<i>Statewide</i>			
	Strongly Agree	Agree	Disagree	Strongly Disagree	<i>Strongly Agree</i>	<i>Agree</i>	<i>Disagree</i>	<i>Strongly Disagree</i>
Tourists do not pay their fair share for services they use.	21%	34%	39%	6%	27%	36%	32%	5%
Most of the jobs in the tourism industry are low paying.	16%	62%	21%	1%	10%	60%	25%	5%
Tourism increases opportunities to learn about other people and cultures.	14%	69%	15%	2%	26%	54%	18%	2%

QUESTIONS SPECIFIC TO MISSOURI RIVER COUNTRY

The Missouri River Country Tourism Board was given the opportunity to include questions specific to the region in the questionnaire. The results of these questions and other community-specific questions are reported in the following section.

Tourism Promotion and Development of Missouri River Country Resources

Residents were asked to rate their support for development and promotion of a variety of tourism and recreation resources in Missouri River Country. The rating scale used included 1 (Not acceptable), 2 (Slightly acceptable), 3 (Acceptable), 4 (Quite acceptable), and 5 (Extremely acceptable).

One item on the list of attractions and resources offered stands out as an excellent opportunity for development and promotion in the eyes Missouri River Country respondents: Fort Peck Lake and its surrounding area. This item received the highest scores in both the development and promotion categories. The three lowest scores were received by snowmobiling/ATV use, the Lewis & Clark Bridge, and Gartsite Lake. Other items that were ranked high for development include Pioneer Town, Fort Union/Confluence, Fishing/Ice Fishing/Fishing Access, and campgrounds/RV parks. Topping the promotional list were Fort Union/Confluence, Fishing/Ice Fishing/ Fishing Access, Campgrounds/RV parks, Historic/cultural centers, and restaurants (Tables 35 and 36).

Table 35: Development and Promotion of Missouri River Country Resources—Percentage Distribution

	Development					Promotion				
	Not Acceptable	Slightly Acceptable	Acceptable	Quite Acceptable	Extremely Acceptable	Not Acceptable	Slightly Acceptable	Acceptable	Quite Acceptable	Extremely Acceptable
<i>Gartsite Lake</i>	8%	29%	44%	14%	5%	9%	28%	35%	20%	8%
The Pines	7%	8%	44%	22%	19%	7%	6%	30%	30%	27%
<i>Pioneer Town</i>	4%	12%	27%	30%	27%	8%	11%	27%	21%	33%
Nelson Reservoir	6%	5%	37%	22%	20%	7%	16%	29%	27%	21%
<i>Sleeping Buffalo</i>	6%	15%	30%	20%	29%	5%	13%	28%	20%	34%
Wildlife refuges/viewing	8%	24%	22%	17%	29%	9%	18%	21%	27%	25%
<i>Retail shopping</i>	7%	13%	27%	32%	21%	6%	12%	27%	27%	28%
Fort Peck area	2%	6%	13%	31%	48%	--	4%	15%	35%	46%
<i>Signage</i>	4%	18%	38%	21%	19%	4%	13%	38%	24%	21%
Lewis & Clark bridge	8%	31%	38%	17%	6%	5%	33%	30%	22%	10%
<i>Snowmobiling/ATV</i>	16%	33%	28%	8%	15%	14%	29%	26%	11%	19%
Lodging	5%	15%	34%	25%	21%	2%	12%	35%	25%	26%
<i>Entertainment</i>	5%	19%	29%	22%	25%	3%	14%	30%	27%	26%
Beautification	6%	13%	26%	29%	26%	4%	12%	28%	27%	29%
<i>Fort Union/Confluence</i>	2%	12%	34%	26%	26%	3%	13%	32%	17%	35%
Fishing/Ice fishing/Access	8%	12%	25%	22%	33%	5%	6%	29%	21%	39%
<i>Campgrounds/RV parks</i>	5%	13%	27%	28%	27%	2%	17%	20%	27%	34%
Historic/cultural centers	5%	15%	27%	21%	32%	3%	15%	22%	26%	34%
<i>Tour services</i>	20%	15%	26%	32%	17%	16%	13%	25%	25%	21%
Restaurants	4%	16%	32%	27%	21%	1%	13%	31%	27%	28%

Table 36: Development and Promotion of Missouri River Country Resources—Average Score

	Development Score*	Promotion Score*
Gartsite Lake	2.78	2.89
The Pines	3.37	3.63
Pioneer Town	3.63	3.62
Nelson Reservoir	3.35	3.40
Sleeping Buffalo	3.53	3.65
Wildlife refuges/viewing	3.36	3.43
Retail shopping	3.46	3.57
Fort Peck area	4.18	4.24
Signage	3.35	3.45
Lewis & Clark bridge	2.83	2.98
Snowmobiling/ATV	2.72	2.89
Lodging	3.43	3.59
Entertainment	3.44	3.61
Beautification	3.56	3.64
Fort Union/Confluence	3.61	3.68
Fishing/Ice fishing/Access	3.61	3.83
Campgrounds/RV parks	3.61	3.73
Historic/cultural centers	3.60	3.74
Tour services	3.03	3.22
Restaurants	3.44	3.68

*Scores represent the mean of scores from 1 to 5 given above.

Transportation Conditions in Missouri River Country

The Missouri River Country Tourism Board members were interested in learning what residents thought of the transportation conditions in the region. To that end, residents were asked not only if they were satisfied with conditions or not, but also what the cause for their potential dissatisfaction was. The latter question was open-ended, giving the respondents the opportunity to provide their own thoughts and wording.

As it turns out, 60 percent of respondents reported that they were dissatisfied with the transportation conditions in their community. The main cause of this dissatisfaction was either poor or missing bus service (32%). In addition, respondents felt strongly that the roads in the region were in need of improvements (25%). Dissatisfaction was also caused by poor and expensive airline service, and by the general lack of public transportation, both within and out of the area (13% each) (Tables 37 and 38).

Table 37: Satisfaction with Transportation Conditions

	% of respondents
Satisfied with transportation conditions	40%
Dissatisfied with transportation conditions	60%

Table 38: Cause of Dissatisfaction with Transportation Conditions

	% of respondents*
Lack of bus service/poor bus service	32%
Need road improvements	25%
Poor airline service/airline service too expensive	13%
Lack of public transportation (inside and out of region)	13%
Not enough Amtrak stops/doesn't stop often enough	7%
Train and plane connections too far away	5%
Highway 2 should be 4-lane	3%
Air only way to travel south	1%
Automobile dependent	1%

*Based on responses from 54 people.



The Strong and Weak Points of Missouri River Country

In an effort to solicit suggestions from Missouri River Country residents regarding what they consider to be the strong points of the region and what they find to be its weaknesses, a set of three questions were asked in an open-ended format.

One survey item requested ideas as to what might entice visitors to Missouri River Country to spend more time in the region. Overwhelmingly, respondents suggested that increased advertising and promotion would help, especially if the promotion were to branch into the Internet domain. Some suggested that improving camping areas would encourage more visitors to remain in the area (7%). Other suggestions include arranging tours of the historic attractions in the region, improving the area's hotels, improving the roads, putting on more events and activities, and further develop the Fort Peck area (5% each) (Table 39). Appendix C contains a complete list of responses.

Table 39: Encouraging Visitors to Spend More Time in MRC

	% of respondents*
More promotion/advertisement (Internet promo)	24%
More camping areas	7%
Tours/historical tours	5%
Improve hotels	5%
Better roads	5%
More events and activities	5%
Development around Fort Peck	5%

*Based on responses from 70 people.

Another question asked residents to offer their view as to the strengths of Missouri River Country as a tourist destination. Although most responses were general and applied to the region as a whole, such as the natural beauty and scenery (16%), some were more specific, offering specific locations as strengths such as Fort Peck Lake and its surrounding area (15%). Other responses included fishing and hunting opportunities (9%), the clean air (9%), and friendly people (8%) (Table 40). For a complete list of all responses to this question, see Appendix D.

Table 40: Strengths of Missouri River Country as a Tourist Destination

	% of respondents*
Natural beauty/scenery	16%
Fort Peck Lake area and activities	15%
Fishing and hunting opportunities	9%
Clean air	9%
Friendly people	8%
Historical significance	8%
Wildlife (for viewing and/or hunting)	4%
Peacefulness/isolation	4%
Native American Heritage	4%

*Respondents could offer more than one suggestion.

While knowing the strengths of a region with respect to tourism development and promotion is important in the planning efforts, an awareness of what residents consider to be the region's weaknesses is also helpful. Residents were asked to identify what they considered to be the greatest weaknesses of Missouri River Country as a tourist destination. Fifteen percent of respondents felt that the sheer size of Missouri River Country is a weakness, due to the vast distances and the relative isolation of the area. While ten percent of respondents feel that the poor quality of roads impedes the tourism effort, other issues addressed were the lack of sights and activities (9%), lack of transportation services (6%), condition of the region's hotels and motels (6%), as well as poor promotion and advertising (6%) (Table 41). Appendix D contains a complete list of responses.

Table 41: Weaknesses of Missouri River Country as a Tourist Destination

	% of respondents*
Distances/isolation	15%
Lack of roads/poor roads	10%
Lack of sights/activities/events	9%
Lack of transportation services	6%
Poor quality accommodations/not enough	6%
Poor promotion/advertising	6%
Lack of restaurants	5%
Lack of economic support for tourism	5%
Lack of services	4%

*Respondents could offer more than one suggestion.

GENERAL COMMENTS

Respondents were provided with space at the end of the survey form 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. Seventeen people took the time to share their opinions, which were then classified into 29 categories, a list of which is provided below. One offensive, non-constructive comment has been omitted (Table 42). Appendix E contains a list of verbatim comments.

Table 42: General Comments

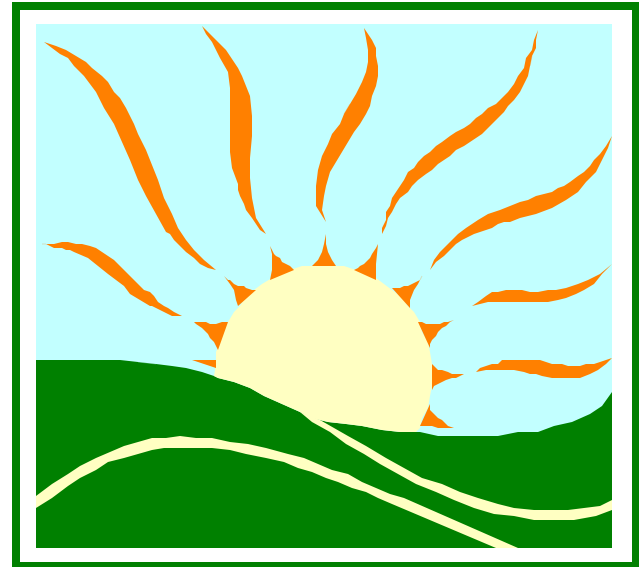
	% of respondents*
Montana needs a sales tax.	7%
With a sales tax, tourism can ease burden of property tax.	3%
Low-paying tourism jobs are training grounds for work ethics, etc.	3%
Tourism’s seasonality fits young people’s academic schedule.	3%
Tourism has more positive than negative impacts.	3%
Trees and shrubs should be planted in Eastern Montana.	3%
Encourage tourism.	3%
Encourage tourists to visit, but not stay.	3%
Encourage tourism promotion w/o premature spending.	3%
People are moving away from the area.	3%
Businesses in town are closing.	3%
Established farms and ranches are going down.	3%
MRC is only attractive in summer, winters are too cold.	3%
Facilities are too poor to attract tourists.	3%
Tourism investment doesn’t pay off when season is short.	3%
Improving roads will bring more tourists to the area.	3%
Need a sports complex to attract tournaments to area.	3%
Improving Canadian exchange rate will help MRC.	3%
Open up gambling so people stop going to Nevada.	3%
Get farming off welfare so they stop going south in winter.	3%
Montana has already been “oversold”.	3%
Montana Travel Planner is the best tourism publication.	3%
Need pamphlets of attractions like in hotels all over US.	3%
Good marketing can bring in tourist dollars.	3%
Tourism raises cost of living for Montanans.	3%
Tourism is not economic development.	3%
Montanans need to be informed of what the state has to offer.	3%

*Represents comments made by 17 respondents. Percentages may not add to 100 due to rounding

**APPENDIX A:
MISSOURI RIVER COUNTRY SURVEY INSTRUMENT**

Please include any additional comments.

Resident Opinions About Tourism in Montana and Missouri River Country



Thank you for your participation.

Please place your completed survey in the envelope provided and drop in any mailbox to:

Institute for Tourism and Recreation Research
The University of Montana
32 Campus Drive, #1234
Missoula, MT 59812-1234

January 2000

Part 1: Please tell us how you feel Missouri River Country is changing, your involvement in the tourism industry, and the role of tourism and other industries in Missouri River Country.

1. In your opinion, how is the population changing in Missouri River Country?

- Growing (please one)
 Decreasing
 Not Changing

1a. If you feel the population in Missouri River Country is changing, is it changing...

- Too fast (please one)
 About right
 Too slow

2. How much contact do you have with tourists visiting your community?

- Regular (please one)
 Somewhat frequent
 Infrequent
 Almost never

3. Which of the following statements best described your behavior toward tourists in Missouri River Country? (please one)

- Make them feel welcome
 No specific reaction
 Avoid them

4. How dependent is your job on tourism?

- Not at all dependent (please one)
 Somewhat dependent
 Very dependent

5. How much of your household income is derived from the tourism industry?

- None at all (please one)
 1% to 25% 51% to 75%
 26% to 50% 76% to 100%

6. Compared to other industries, how important a role do you think tourism should have in Missouri River Country's economy? (please one)

- No role
 A minor role
 A role equal to other industries
 A dominant role

STATEWIDE

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

Part 5: Finally, we would like to know a little bit about you.

1. Where do you live? In town Out of town

2. Were you born in Montana? Yes No

3. How many years have you lived in... Missouri River Country? ____
 Montana? ____

4. What is your age? ____ years 5. What is your gender? __M __F

6. Which one of the following best describes **your** occupation? (please one)

- | | | |
|---------------------------------------|---|--|
| <input type="checkbox"/> Professional | <input type="checkbox"/> Transport | <input type="checkbox"/> Homemaker |
| <input type="checkbox"/> Managerial | <input type="checkbox"/> Laborer | <input type="checkbox"/> Student |
| <input type="checkbox"/> Sales | <input type="checkbox"/> Service Worker | <input type="checkbox"/> Retired |
| <input type="checkbox"/> Clerical | <input type="checkbox"/> Farmer/Rancher | <input type="checkbox"/> Self Employed |
| <input type="checkbox"/> Craftsman | <input type="checkbox"/> Farm/Ranch Laborer | <input type="checkbox"/> Unemployed/
Disabled |
| <input type="checkbox"/> Operatives | <input type="checkbox"/> Armed Services | |

Part 4: Please indicate your level of support for each of the following statements regarding tourism in Missouri River Country. Then evaluate tourism in the State of Montana.

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

7. In your opinion, which of the following provide the best opportunities for future economic development in Missouri River Country? Please rank 1 through 7, with 1 being the **best** opportunity.

- | | |
|--------------------------|-----------------------------------|
| _____ Mining | _____ Agriculture/Agribusiness |
| _____ Wood products | _____ Retail & wholesale trade |
| _____ Manufacturing | _____ Services (health, business) |
| _____ Tourism/recreation | |

Part 2: Questions Specific to Missouri River Country. Daniels, Garfield, McCone, Phillips, Richland, Roosevelt, Sheridan and Valley Counties are all part of the tourism region known as Missouri River Country. As a resident of this region, we ask that you share with us your opinions about tourism development.

1. Missouri River Country offers a wide range of activities and resources that could be further developed or promoted in order to increase tourist visitation. Using the scale below, please indicate the acceptability of development and promotion for each item listed.

- | | |
|-------------------------------|--------------------------------|
| 1 =Not acceptable | 4 =Quite acceptable |
| 2 =Slightly acceptable | 5 =Extremely acceptable |
| 3 =Acceptable | |

	<u>Development</u>	<u>Promotion</u>
Gartsite Lake	---	---
The Pines	---	---
Pioneer Town	---	---
Nelson Reservoir	---	---
Sleeping Buffalo	---	---
Wildlife refuges/viewing	---	---
Retail shopping	---	---
Fort Peck (camping, marina, theatre)	---	---
Signage (directional and informational)	---	---
Lewis & Clark bridge	---	---
Snowmobiling/ATV	---	---
Lodging (hotels, motels)	---	---
Entertainment (theatre, fairs, events)	---	---
Beautification	---	---
Fort Union/Confluence	---	---
Fishing/Ice fishing/Fishing access	---	---
Campgrounds/RV parks	---	---
Historic/cultural centers	---	---
Tour services	---	---
Restaurants	---	---

2. What do you feel could be done to encourage visitors to spend more time in Missouri River Country? _____

3. In your opinion, what is the greatest **strength** of Missouri River Country as a tourist destination? _____

4. What is the greatest **weakness** of Missouri River Country as a tourist destination? _____

5. Are you satisfied with the transportation conditions in Missouri River Country? Yes [] No []

If **no**, what is the cause of your dissatisfaction? _____

6. In your opinion, what is the **top advantage** of increased tourism in Missouri River Country? _____

7. In your opinion, what is the **top disadvantage** of increased tourism in Missouri River Country? _____

Part 3: Please tell us how you perceive the present condition of each of the following elements of Missouri River Country and tourism's influence on those conditions. Indicate the present condition on the left side of the grid and tourism's influence on the right.

PRESENT CONDITION

TOURISM'S INFLUENCE

Don't Know	Very Good Condition	Good Condition	Poor Condition	Very Poor Condition		Positive Influence	Both Positive and Negative	Negative Influence	No Influence	Don't Know
DK	4	3	2	1	Emergency services (police, fire, etc)	+	=	-	NI	DK
DK	4	3	2	1	Museums and cultural centers	+	=	-	NI	DK
DK	4	3	2	1	Job opportunities	+	=	-	NI	DK
DK	4	3	2	1	Education system	+	=	-	NI	DK
DK	4	3	2	1	Cost of living	+	=	-	NI	DK
DK	4	3	2	1	Safety from crime	+	=	-	NI	DK
DK	4	3	2	1	Condition of roads and highways	+	=	-	NI	DK
DK	4	3	2	1	Infrastructure (water, sewer, etc.)	+	=	-	NI	DK
DK	4	3	2	1	Traffic congestion	+	=	-	NI	DK
DK	4	3	2	1	Overall community livability	+	=	-	NI	DK
DK	4	3	2	1	Parks and recreation areas	+	=	-	NI	DK
DK	4	3	2	1	Overall cleanliness and appearance	+	=	-	NI	DK

**APPENDIX B:
MISSOURI RIVER COUNTRY
ADVANTAGES AND DISADVANTAGES
OF INCREASED TOURISM**

Missouri River Country Advantages of Increased Tourism

- Economic benefit (more jobs, more money, more profit, etc.)
- No benefit/No advantage
- Improved roads
- Increased population
- Encourages improvements in the community
- Sharing beauty of the area
- Benefit to local museums

Missouri River Country Disadvantages of Increased Tourism

- Over-use of natural resources
- Tourists don't pay taxes
- Ruining of nature's beauty
- Tourists/Wrong type of people visiting
- Too many people/Crowding/Growth
- Crime/Loss of Safety
- Increased taxes/Cost of infrastructure
- Increased need for services/Over-use of existing services
- Tourist don't take care of things/Tourist disrespect/Garbage
- No disadvantage
- Trespassing on private roads/lands
- Commercialization of the area
- Public unawareness
- Competition for limited recreational opportunities
- Less trust in people
- Risk losing unique "Big Sky Country" feel
- Traffic/Road rage
- Tourists eventually moving to area
- Tourism is not economic development
- Disturbs natural habitats of animals

**APPENDIX C:
SUGGESTIONS FOR ENCOURAGING VISITORS
TO SPEND MORE TIME IN
MISSOURI RIVER COUNTRY**

Suggestions for Encouraging Visitors to Spend More Time in MRC

- Tours/Historic tours
- Improve motels
- Improve restaurants
- More promotion/Advertising/Internet promotion
- Improve accessibility
- Leave nature alone/Nothing is needed
- Provide opportunities for relaxation
- Dept. of Commerce staff in each community
- Better bus service/transportation
- Better tourist stops
- Better roads
- Better facilities/services
- More “Western” things
- Promote history
- More shopping
- More camping areas
- Clean rest areas/More rest areas
- Enhance economy of area
- Less limitations on outfitter services
- Improved signage
- Dude ranches
- Camps for children/teenagers
- Tourism development plan/support system
- Develop existing attractions
- More scenic spots
- More boat ramps
- Gambling
- Include more Eastern Montana activities when describing state
- Hunting and fishing promotion
- Beautification of individual towns
- Promote Indian Reservation/Indian Culture
- More events/activities
- Development around Fort Peck
- Locals could serve as host families for visitors

**APPENDIX D:
STRENGTHS AND WEAKNESSES OF
MISSOURI RIVER COUNTRY AS A
TOURIST DESTINATION**

Strengths of Missouri River Country as a Tourist Destination

- Low population
- Fort Peck Lake/Fort Peck area activities
- Friendly people
- Natural beauty/Scenery/Uniqueness
- Fishing and hunting opportunities
- Historical significance
- Clean air
- Space/Open Space/Rural nature
- Outdoor recreation
- Like going back in time
- Lewis and Clark history
- Sightseeing
- Wildlife (viewing or hunting)
- Fort Union/Fort Buford
- Peacefulness/Slow pace
- No stressful traffic conditions
- Trail rides
- Indian reservation/Native American heritage
- Not a tourist trap
- Gambling
- Glasgow Chamber of Commerce
- Gateway Inn and Sam's Supper Club
- Dinosaurs/fossils
- On the way to the mountains
- Museums
- Missouri River
- Sugar Beet Valley
- Hell Creek Recreation Site
- Rest area

Weaknesses of Missouri River Country as a Tourist Destination

- Lack of roads/Poor quality of roads
- Lack of services
- Cold winters/Climate
- Transportation services
- Accommodations (poor quality/not enough)
- Distances/Remoteness/Isolation
- Distance from mountains, forests
- Lack of sights/activities/events
- No shopping
- Lack of restaurants/dining options
- Good tourist/visitor stops few and far between
- Sporting access
- Poor facilities/Lack of facilities
- Reluctance to work on presented ideas
- Restrooms at recreation sites
- Mosquitos
- Lack of signage
- Lack of access
- Poor promotion/advertising
- Lack of physical beauty
- Not located on the Interstate
- Lack of campgrounds
- Lack of trees
- Unknown areas
- Lack of economic support for tourism/poor economy
- Lack of boat ramps
- No activities for younger people (older teens and up)
- Nothing here
- Not enough rodeos
- Poor fishing
- Lack of regional cooperation
- No tours at present
- Destruction of private property

**APPENDIX E:
GENERAL MISSOURI RIVER COUNTRY COMMENTS**

**General Missouri River Comments
(Verbatim, spelling corrected*)**

When you ask if most jobs in tourism are low-paying, I try to figure out the "angle" of the question. Low paying compared to what? Can you expect all tourism jobs to be on par \$ wise with the likes of engineers, welders, RNs, etc? I think not. An employer cannot afford to pay those wages for entry-level work. These entry-level jobs of the tourism industry are most excellent training grounds for good work ethics, habits, etc, etc, for our young people. The seasonal nature also fits well with their academic careers. Anyways, in my humble opinion, tourism offers substantially more positive impacts than negative ones.

Respectively yours,
(name withheld)

P.S.
This is an Eastern Montana opinion.

We have a beautiful state damn it--keep it clean & more trees should be planted in Eastern MT. Along roadways! Shrubs also.

I don't think we have a real lot to offer for tourism except to go on through and believe there is adequate facilities for that now. Fort Peck Lake could be quite an attraction but would need more roads and facilities and would that pay out when the season is so short?

The only way to help Missouri River Country is to get the Canadian exchange on money the same as ours or close. Open up gambling so people stop going to Nevada to gamble. Get the farming off well fare so they don't go South in winter.

Montana has already been "oversold"- the Department of Tourism is like a really bad dream!

I only answered those questions I felt I knew something about--some of these questions are masterpieces of ambiguity--the world ain't black and white you know it's pretty much shades of gray--still this questionnaire is probably a good idea.
(Name omitted)

I have mixed feelings about tourism--it seems they have brought up land prices so many of the natives--not Indians but those who have spent their lives here can hardly afford the taxes. Here in Sidney, that is hardly noticeable because of our location. Nevertheless it has had some influence. Sorry, but I really don't know enough about these subjects to feel very qualified to speak on them.

We need a state sales tax - especially since we already have one on bed tax, gas tax, and tourist town tax. Tourism is not economic development, however, it is better than a poke in the eye!

Tourism should be encouraged Tourists should be encouraged to come to Montana, see a couple of wolves eat an elk, then move on and not stay, tip the minimum wage waitress as they leave.

We need to promote tourism without prematurely spending a lot of money on development.

Tourists only want to visit Missouri River County in the summer. The reason people don't move to Valley County and other counties is because of the tough winter. Nice place to visit but wouldn't want to live here.

I graduated with 77 classmates. Approx. 10 of us are still here. Banks are not lending money, established farms and ranches are going down, and businesses in town are closing. It's hard to be inviting when you are just hanging on!

I believe better roads would bring more tourists and promotion of Lewis and Clark journeys through our area-
More history and museums .

We have the professional Walleye tournament here every 2 years (Which is great). But the local motels (5) won't guarantee rooms for the state legion baseball tourney to be held here this year at the same time, because they want to save rooms for the fishermen. Baseball tournaments also bring a lot of money to the local businesses. It would be great to have a nice spot, complex to attract more tournaments to this end of the country. How about in Fort Peck?

We have traveled someplace in the USA every year since our marriage. We have four states left to visit. Rhode Island, North and South Carolina, and Georgia. In Canada we have Northwest Territories and New Foundland left. Last summer we spent three weeks in Great Britain. Have traveled all of Montana, I consider "Montana Travel Planner" as one of the best publications for tourism. Each person has his or her liking to traveling.

I think a lot more should be done with marketing. When you travel you can find pamphlets from many places from hundreds of miles from where you are at but seldom do you see such things from places in Montana. Also places in other rural Great Plains areas have brought in a lot of tourist dollars into the local economies for example: Wall Drug in South Dakota, the Corn Palace and other museums in Mitchell, SD and also the Pioneer Village Museum in Minden, NE which is somewhat similar to the Pioneer Town in Scobey. All these places have brought in these dollars because of marketing.

We need to educate the residents of Montana about Montana. So many questions I could not answer because I didn't know myself enough info to form an opinion. It would be nice if the tourist info given to out of state tourists was given readily to in state. Perhaps this would encourage Montanans to tour Montana first. We tend to take too much for granted that our people know what is going on. I know answers about my county but not the neighboring counties.

We need a sales tax—tourism could reduce the burden of property tax!

*One offensive, non-constructive comment omitted