

# **Montana Residents Define Tourism's Role in the State**

Research Report 72

February 2000

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## **EXECUTIVE SUMMARY**

This report presents Montana residents' opinions and attitudes about tourism in Montana and in their community. A mail-back questionnaire was administered to a randomly selected sample of 1,000 residents of Montana during October and November, 1999. The initial mailing was followed one week later by a reminder postcard and two weeks after that by a replacement questionnaire to those residents who had not yet responded.

### **RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:**

- Exactly half of the respondents were native-born Montanans. On average, they had lived in the state for over 90 percent of their lives.
- Most residents report that they live in town as opposed to out of town.
- Professionals and retirees were the most frequently represented employment groups.
- Tourism/recreation ranked fourth behind agriculture/agribusiness, retail and wholesale trade, and services as providing the best opportunity for future economic development in Montana.
- Almost three-fourths of Montanans feel their jobs are not at all dependent on tourism. The same amount of residents feel their income is not at all dependent on tourism.
- While contact with tourists is infrequent, residents generally try to make them feel welcome.
- Residents feel strongly that they should be involved in tourism planning.
- Most residents feel that the population in their community is growing. A majority feels it is growing too fast.
- Residents support tourism development, but do not feel they will benefit personally from an increase in the industry. They worry that tourism will deteriorate the quality of life in their community.
- Most residents would support land-use regulations to help control growth in their area.
- Residents generally feel there is adequate undeveloped open space in their area, but are concerned about its potential disappearance.
- Economic benefits are perceived to be the top advantage of increased tourism, while crowding/congestion, tourists moving here, and the environmental impact are considered the top disadvantages.
- Operation/maintenance of State Parks, managing fish and wildlife resources, and support for local public services are the items of highest priority for funding by the Bed Tax.

# TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY .....</b>	<b>i</b>
<b>INTRODUCTION .....</b>	<b>1</b>
<b>SECTION I: THE MONTANA RESIDENT ATTITUDE STUDY.....</b>	<b>3</b>
<b>METHODOLOGY .....</b>	<b>3</b>
<b>RESULTS.....</b>	<b>4</b>
<i>Respondent Characteristics .....</i>	<i>4</i>
<i>Tourism and the Economy.....</i>	<i>5</i>
<i>Employment and Dependence on Tourism .....</i>	<i>6</i>
<i>Interactions with Tourists.....</i>	<i>7</i>
<i>Community Attachment and Change .....</i>	<i>8</i>
<i>Quality of Community Life.....</i>	<i>10</i>
<b>ATTITUDES AND OPINIONS ABOUT TOURISM .....</b>	<b>11</b>
<i>Support for Tourism Development.....</i>	<i>11</i>
<i>Concerns about Increased Tourism.....</i>	<i>13</i>
<i>Concerns about Land Use Issues.....</i>	<i>14</i>
<i>Tourism Related Decision Making .....</i>	<i>15</i>
<i>Advantages and Disadvantages of Tourism Development.....</i>	<i>15</i>
<b>RESIDENTS’ OPINIONS ABOUT THE STATEWIDE “BED TAX” .....</b>	<b>17</b>
<b>GENERAL COMMENTS .....</b>	<b>19</b>
<b>SECTION II: RESIDENT ATTITUDE BY COMMUNITY TYPE .....</b>	<b>20</b>
<i>Respondent Demographics by Community Type .....</i>	<i>20</i>
<i>Quality of Life by Community Type.....</i>	<i>20</i>
<i>Tourism Development and Resident Attitudes Regarding Tourism by Community Type .....</i>	<i>23</i>
<i>Interactions with Tourists by Community Type .....</i>	<i>23</i>
<i>Land Use Issues by Community Type .....</i>	<i>24</i>
<i>Economic Development.....</i>	<i>24</i>
<b>SECTION III: IMPLICATIONS FOR MONTANA.....</b>	<b>26</b>
<i>Policy Implications.....</i>	<i>26</i>
<i>Planning Implications.....</i>	<i>26</i>
<i>Marketing Implications.....</i>	<i>27</i>
<b>APPENDIX A: STATEWIDE SURVEY INSTRUMENT .....</b>	<b>28</b>
<b>APPENDIX B: ADVANTAGES AND DISADVANTAGES OF TOURISM DEVELOPMENT .....</b>	<b>32</b>
<b>APPENDIX C: STATEWIDE COMMENTS .....</b>	<b>34</b>

## LIST OF TABLES

TABLE 1: SAMPLE SIZE AND RESPONSE RATE FOR THE SURVEY SAMPLE .....	3
TABLE 2: RESPONDENTS AGE CHARACTERISTICS .....	4
TABLE 3: RESPONDENTS’ STATE RESIDENCY CHARACTERISTICS .....	4
TABLE 4: RESPONDENTS’ COUNTY RESIDENCY CHARACTERISTICS .....	5
TABLE 5: ROLE OF TOURISM IN COUNTY ECONOMY .....	5
TABLE 6: BEST OPPORTUNITY FOR ECONOMIC DEVELOPMENT.....	6
TABLE 7: EMPLOYMENT STATUS OF RESIDENT RESPONDENTS .....	6
TABLE 8: EXTENT OF JOB DEPENDING ON TOURISM .....	7
TABLE 9: SHARE OF INCOME DEPENDING ON TOURISM.....	7
TABLE 10: INTERACTIONS WITH TOURISTS.....	8
TABLE 11: RESIDENT BEHAVIOR TOWARD TOURISTS .....	8
TABLE 12: COMMUNITY ATTACHMENT STATEMENTS.....	9
TABLE 13: PERCEPTIONS OF COMMUNITY GROWTH.....	9
TABLE 14: QUALITY OF COMMUNITY LIFE.....	10
TABLE 15: SUPPORT FOR TOURISM DEVELOPMENT.....	12
TABLE 16: CONCERNS ABOUT INCREASED TOURISM.....	13
TABLE 17: LAND USE ISSUES .....	14
TABLE 18: TOURISM-RELATED DECISION MAKING.....	15
TABLE 19: TOP ADVANTAGES OF INCREASED TOURISM IN THE COMMUNITY .....	16
TABLE 20: TOP DISADVANTAGES OF INCREASED TOURISM IN THE COMMUNITY .....	16
TABLE 21: GENERAL COMMENTS.....	19
TABLE 22: RESPONDENT DEMOGRAPHICS BY RESIDENCE.....	20
TABLE 23: PRESENT CONDITION AND TOURISM’S INFLUENCE ON QUALITY OF LIFE FACTORS BY COMMUNITY TYPE .....	22
TABLE 24: TOURISM ATTITUDES BY COMMUNITY TYPE.....	23
TABLE 25: REACTION TO TOURISTS BY COMMUNITY TYPE.....	23
TABLE 26: LAND USE ISSUES BY COMMUNITY TYPE .....	24
TABLE 27: BEST ECONOMIC DEVELOPMENT OPPORTUNITIES BY COMMUNITY TYPE .....	24

## LIST OF CHARTS

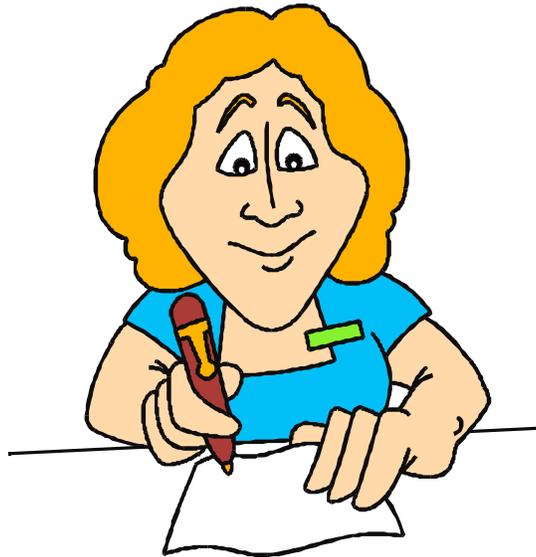
FIGURE 1: FAMILIARITY WITH THE BED TAX ISSUE.....	17
FIGURE 2: RESIDENTS’ PRIORITY RATINGS FOR BED TAX FUNDS.....	18

## INTRODUCTION

This report is intended to provide a comprehensive profile of resident attitudes toward tourism in Montana. The statewide survey was administered in conjunction with the 1999 Community Tourism Assessment Process (CTAP), which is conducted in three communities each year. The statewide portion of the assessment process is used to compare individual community attitudes with those of statewide residents, as well as for monitoring resident attitudes over time. This report describes Montana resident attitudes toward tourism and was published, in part, along with county/community results for Valley County and for the Whitehall area of Jefferson County.

In addition to analyzing all resident responses to develop an average response for each element, a separate analysis is presented comparing responses of residents living in different types of communities. This gives the reader an understanding of how opinions differ among residents from different areas of the state.

This report is presented in three sections. The first section provides resident responses from all respondents. The second section provides responses based on the residents' community type. The final section provides implications for planning, policy, and marketing based on the findings of the study.





## SECTION I: THE MONTANA RESIDENT ATTITUDE STUDY

### METHODOLOGY

A mail-back questionnaire was administered to a randomly selected sample of 1,000 Montana households during October and November, 1999. One week after the initial mailing, 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. Non-response bias checks are generally conducted to determine if people 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 that may have differed between respondents and non-respondents involved statements about support for tourism development. These key questions could only be answered after answering numerous other questions asked in the survey. Therefore, it was not possible to develop a condensed telephone non-response questionnaire. Because of this reason, it was decided that comparable data could not be generated from telephone non-respondent interviews.

However, to make the sample representative of the population, age comparisons were made between the census<sup>1</sup> and the sample. Because the age distribution of respondents to the survey differed from the July 1, 1998 census estimates of age group categories, responses were adjusted to reflect the population of Montana. Results presented reflect the adjusted data set.

**Table 1:** Sample Size and Response Rate for the Survey Sample

	Montana
Resident questionnaires mailed:	1,000
Undeliverables:	105
Resident questionnaires returned:	244
Resident Opinion Study response rate:	27%
Female:male response ratio	56:44

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

- 1) Respondent Characteristics
- 2) Residents' Attitudes and Opinions about Tourism
- 3) Specific "Bed Tax" Questions

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<sup>1</sup> 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](http://www.com.state.mt.us/ceic)

## RESULTS

This section provides results of the statewide 1999 Resident Opinion Study. The figures presented reflect the results from the 244 completed questionnaires.

### Respondent Characteristics

A number of survey questions related to respondent characteristics. These questions were asked in order to verify that the sample group is reflective of the population in general.

Forty-four percent of respondents to the statewide survey were male. The remaining 56 percent were female. The average age of respondents to the statewide survey was 51 years with respondents ranging in age from 19 to 88 years of age (Table 2).

**Table 2:** Respondents Age Characteristics

	<b>Montanans</b>
Percent Male	44%
Percent Female	56%
Minimum Age	19 years
Maximum Age	88 years
Average Age	51 years

Exactly half (50%) of survey respondents were native-born Montanans. On average, they had lived in the state for 92 percent of their lives. Over half (54%) of respondents indicated they lived “In town”. Respondents who reported that they live “Out of town” made up 46 percent of the study participants. On average, respondents had lived in the State of Montana for 21 years (Table 3). Respondents' average length of residence in their county was 21 years. Seventeen percent of respondents had lived in their county longer than 40 years, while 35 percent had lived in their county less than 10 years (Table 4).

**Table 3:** Respondents' State Residency Characteristics

<b>State Residency:</b>	<b>Montanans</b>
Born in Montana	50%
Mean years lived in Montana	21 years
Residents living “In town”	54%
Residents living “Out of town”	46%
Percentage of life spent in Montana	92%

**Table 4:** Respondents' County Residency Characteristics

<b>County Residency:</b>	<b>Montanans</b>
10 years or less	35%
11 to 20 years	23%
21 to 30 years	15%
31 to 40 years	10%
41 to 50 years	8%
51 to 60 years	5%
61 years or more	4%
Mean years spent in county	21 years
Percentage of life spent in county	41%

## **Tourism and the Economy**

Several survey questions related to the role tourism should have in the local economy. Residents were asked, "Compared to other industries, how important a role do you think tourism should have in your community's economy?" In addition, residents ranked industries on a scale of 1 (best) through 7 (worst) indicating what they believed offered the best opportunity for future economic growth for their community.

The majority of respondents (57%) believed that tourism should play a role equal to other industries in the economy while about one fourth (26%) thought tourism should play a relatively minor role. One percent thought that tourism should have no role in the local economy (Table 5). Tourism ranked fourth behind agriculture/agribusiness, retail & wholesale trade, and services, as offering the best opportunity for economic development (Table 6).

**Table 5:** Role of Tourism in County Economy

	<b>Montanans</b>
No role	1%
A minor role	26%
A role equal to other industries	57%
A dominant role	10%

**Table 6:** Best Opportunity for Economic Development

Industry	Montanans	
	Rank	Mean*
Agriculture/Agribusiness	1	3.07
Retail & wholesale trade	2	3.19
Services (health, business, etc)	3	3.36
Tourism/recreation	4	3.66
Manufacturing	5	3.81
Wood products	6	5.00
Mining	7	5.67

**Residents ranked tourism fourth in importance as offering the best opportunity for future economic development.**

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

### Employment and Dependence on Tourism

Professionals made up the largest group of respondents to the statewide survey, constituting 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 of the respondents (Table 7).

**Table 7:** Employment Status of Resident Respondents

Employment Status:	Montanans
Professional	28%
Retired	18%
Self Employed	8%
Craftsman	7%
Student	5%
Homemaker	5%
Laborers	5%
Farmer/Rancher	5%
Clerical	5%
Service Worker	5%
Sales	3%
Managerial	2%
Unemployed/disabled	1%
Operative	<1%
Transport	<1%
Farm/Ranch Laborer	--
Armed Forces	--

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

Nine percent of respondents indicated that their job was very dependent on tourism, while almost three-fourths of all statewide respondents stated that their job was not at all dependent on tourism. Less than 1 percent indicated that they were dependent on tourism for 76 to 100 percent of their income, while 73 percent reported that none of their income was dependent on tourism (Tables 8, 9).

**Table 8:** Extent of Job Depending on Tourism

<b>Job Dependency</b>	<b>Montanans</b>
Very dependent	9%
Somewhat dependent	18%
Not at all dependent	<b>73%</b>

**The majority of respondents did not feel their job was dependent on tourism.**

**Table 9:** Share of Income Depending on Tourism

<b>Income Dependency</b>	<b>Montanans</b>
None at all	73%
1-25%	17%
26-50%	6%
51-75%	3%
76-100%	<1%

**Most respondents did not think their income was dependent on tourism.**

## **Interactions with Tourists**

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

When asked about the frequency of their day-to-day interaction 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. Eight percent of respondents made an effort to avoid tourists in their community, while 62 percent tried to make visitors feel welcome (Tables 10 and 11)

**Table 10:** Interactions with Tourists

Frequency of Interactions	Montanans
Regular	19%
Somewhat Frequent	29%
Infrequent	<b>35%</b>
Almost Never	17%

**Table 11:** Resident Behavior Toward Tourists

Behavior	Montanans
Make them feel welcome	<b>62%</b>
No specific reaction	30%
Try to avoid them	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 this report in Tables 3 and 4. Another measure of community attachment is based on opinions which residents hold about their community (Table 12). 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 while a response of 2.5 or less indicates disagreement. Finally, Table 13 presents the degree to which respondents felt their community was growing and at what rate.

The Index of Community Attachment (i.e., the mean of the four community attachment statements) indicates that Montanans are quite attached to their community. An average rating of 3.10 shows that residents like where they live. Respondents were very positive in their feelings about their community except in regard to their opinions about its future. This item had the lowest average score of the four items making up the community attachment index (Table 12).

Residents were asked whether they perceived the population of their county to be changing and, if so, at what rate. Sixty-nine percent of respondents felt the population of their county was growing. Thirteen percent reported that it was decreasing (Table 13). Of those who felt the population was changing, over half felt it was changing too fast, while 38 percent felt it was changing at about the right rate.

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

**Table 12:** Community Attachment Statements

Statement:	Mean*				
		Strongly Agree	Agree	Disagree	Strongly Disagree
It is important that the residents of my community be involved in decisions about tourism	3.36	43%	50%	6%	<1%
If I had to move away from my community, I would be very sorry to leave	3.30	47%	37%	14%	2%
I'd rather live in my community than anywhere else	3.08	38%	36%	22%	4%
I think the future of my community looks bright	2.67	13%	51%	26%	10%
<b>Index of Community Attachment</b>	<b>3.10</b>	N/A	N/A	N/A	N/A

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

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

**Table 13:** Perceptions of Community Growth

Growth Characteristics:	Montanans
<b>How is the population changing in your community?</b>	
Growing	<b>69%</b>
Decreasing	13%
Not changing	18%
<b>If changing, is your community changing . . .</b>	
Too fast?	<b>59%</b>
About right?	38%
Too slow?	3%

**Montanans believe the population in their community is growing, and the majority feels it is growing too fast.**

## Quality of Community Life

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

To that end, respondents were asked to rate the condition of a number of factors that influence the quality of community life, in addition to tourism's influence on those factors. Residents indicated whether they perceived the present condition of each factor to be good or poor and tourism's influence on that condition.

Residents felt tourism has a positive influence on the good condition of our museums and cultural centers. Job opportunities are perceived to be in poor condition, but residents do not agree as to the type of impact tourism has on this condition. On the other hand, the cost of living and traffic congestion are perceived to be in poor condition, and tourism is perceived to have a largely negative influence on these factors. However, residents felt that parks and recreation areas are in good condition and that tourism has both a positive and negative influence on that condition (Tables 14 and 15).

**Table 14:** Quality of Community Life

How would you rate the <i>present condition</i> of . . .	Mean*	Tourism's influence on Quality of Community Life factors:				
		No Influence	Negative Influence	Positive & Negative	Positive Influence	Don't Know
Emergency services (police, fire, etc)	3.20	28%	9%	28%	12%	23%
Over-all community livability	3.26	7%	1%	16%	61%	15%
Safety from Crime	3.07	23%	13%	28%	25%	11%
Parks and recreation areas	3.09	50%	9%	19%	7%	15%
Educational system	3.00	19%	34%	27%	8%	12%
Museums and cultural centers	3.08	21%	23%	32%	9%	15%
Infrastructure (water, sewer, etc.)	2.78	14%	32%	35%	12%	7%
Over-all cleanliness and appearance	3.02	30%	23%	22%	7%	18%
Condition of roads and highways	2.59	12%	56%	17%	9%	6%
Cost of living	2.30	25%	10%	42%	13%	10%
Traffic congestion	2.62	10%	16%	40%	27%	7%
Job opportunities	2.25	14%	17%	40%	21%	8%

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

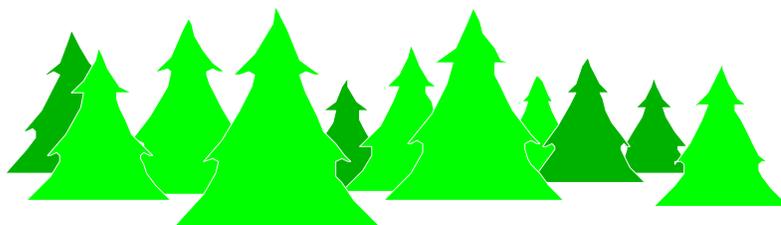
## ATTITUDES AND OPINIONS ABOUT TOURISM

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

### Support for Tourism Development

Some questions addressed general support for tourism development while others addressed more specific aspects of tourism. Table 15 presents responses to statements related to support for tourism development along with an average response for each item.

Almost two-thirds of respondents believe that their county is an attractive place to invest 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. Over seventy percent support continued tourism promotion by Montana. Not as many residents believe that they would be affected if tourism increased in their county. Only 24 percent felt they would benefit personally by increased tourism. The majority of respondents believed that the benefits of tourism outweigh the negative effects. Finally, respondents did not think increased tourism would result in increased quality of life in their community.

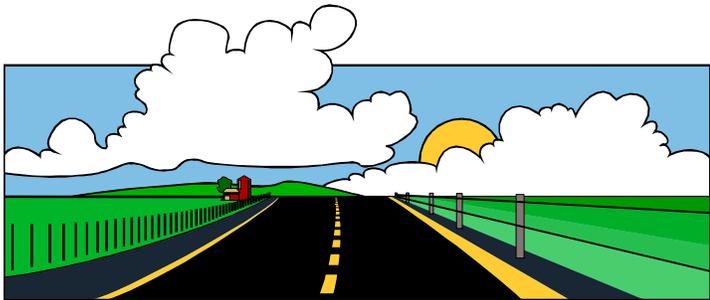


**Table 15:** Support for Tourism Development

Statement:	Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score*
Tourism promotion by Montana benefits my community economically	12%	62%	19%	7%	2.80
I support continued tourism promotion and advertising to out-of-state visitors by the State of Montana	15%	58%	15%	12%	2.77
My county is an attractive place to invest in new tourism development	12%	51%	27%	10%	2.65
The overall benefits of tourism outweigh the negative impacts	8%	55%	25%	12%	2.59
Increased tourism would help my county grow in the right direction	12%	37%	34%	17%	2.45
If tourism increases in Montana, the overall quality of life for Montana residents will improve	5%	30%	45%	20%	2.20
I will benefit financially if tourism increases in my county	7%	17%	43%	33%	1.97

**Residents support tourism promotion, believe the benefits of tourism outweigh the negative impacts, and think their community is an attractive place for tourism investment. However, they do not think they will personally benefit from increased tourism and tend to feel that tourism will negatively affect the quality of life in their community.**

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



## Concerns about Increased Tourism

Residents of a community may become concerned about changes that will impact the quality of life they have become used 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.

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 agreed that vacationing in Montana influenced too many people to move here. In light of this, 56 percent feel that the state is becoming overcrowded by tourists (Table 16).

**Table 16:** Concerns about Increased Tourism

<b>Statement:</b>	<b>Strongly Agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>Average Score*</b>
I would support land-use regulations to help control the type of future growth in my community/county.	28%	48%	16%	8%	2.95
Vacationing in Montana influences too many people to move to Montana	32%	38%	27%	3%	2.99
In recent years, the state is becoming overcrowded because of more tourists	22%	34%	36%	8%	2.71

**Montana residents highly favor land-use regulations to control growth.**

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

## Concerns about Land Use Issues

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

Sixty-two percent of respondents agreed that there was adequate undeveloped open space in their county. Almost three-fourths (72%) were concerned about the disappearance of open space. Only 36 percent of respondents felt that their access to recreation opportunities was limited because of the presence of out-of-state visitors (Table 17).

**Table 17:** Land Use Issues

Statement:	Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score*
There is adequate undeveloped open space in my county.	16%	46%	23%	15%	2.62
I am concerned about the potential disappearance of open space in my county.	44%	28%	22%	6%	3.11
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	11%	25%	54%	10%	2.37

**While residents think there is adequate open space, they are concerned with its disappearance. Thirty-six percent believe their recreation access to has been limited by out-of-state visitors.**

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

## Tourism Related Decision Making

Residents have strong feelings about participating in decisions that will ultimately affect their community and their own lives. Residents were asked to indicate on a 4-point scale their responses to two items related to who should make decisions about tourism development in their community.

Respondents feel strongly that residents be involved in decision making about local tourism development. Ninety-three percent of respondents agreed with the statement "It is important that residents of my community be involved in decisions about tourism". Sixty-one percent of respondents disagreed with the statement "Decisions about how much tourism there should be in my community/county are best left to the private sector" (Table 18).

**Table 18:** Tourism-Related Decision Making

Statement:	Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score*
It is important that residents of my community/county be involved in decisions about tourism.	43%	50%	6%	<1%	3.36
Decisions about how much tourism there should be in my community/county are best left to the private sector.	13%	26%	34%	27%	2.26

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

**Residents feel strongly about being involved in decision making related to tourism development.**

## Advantages and Disadvantages of Tourism Development

To further clarify the perceived benefits and costs of tourism development, respondents were asked to provide the top advantage and disadvantage of increased tourism in their community. This was an open-ended question where respondents provided their own thoughts and wording. The suggestions were then assigned to general categories for comparison. Appendix B contains a complete list of responses.

Overall economic benefit topped the list of advantages. Over 90 percent of responses indicated that more jobs, more income and more profits were seen as the top advantages (Table 19).

Congestion/crowding tops the list of disadvantages with 51 percent of respondents expressing their concern, followed by 13 percent of Montana residents being concerned about tourists moving to the state (Table 20). For a complete list of the advantages and disadvantages associated with tourism development, see Appendix B.

**Table 19:** Top Advantages of Increased Tourism in the Community

<b>Top Advantage*:</b>	<b>Montanans**</b>
Economic benefit (more jobs, more income, more profits, etc.)	<b>96%</b>
No advantage	11%
More things to do	3%
Getting to know people from other places	2%
Promotes cultural diversity	1%
Improved service industry	1%
Increased support for preservation of wilderness	1%
Supports art/cultural development	1%

\* Represents responses by 188 respondents.

\*\*Respondents could offer more than one suggestion

**Table 20:** Top Disadvantages of Increased Tourism in the Community

<b>Main Disadvantage*:</b>	<b>Montanans**</b>
Congestion/Crowding/Traffic	<b>51%</b>
Tourists moving here	13%
Environmental impact (strain on environment, loss of open space, etc.)	12%
Increased cost of living	8%
Increased pollution	7%
No disadvantage	7%
Increase in illegal activity	6%
Strain on infrastructure	4%
More low-income jobs	4%
Only seasonal influx of people/money	3%
Increased taxes to pay for increased services	3%
Disturbance of community atmosphere	2%

\* Represents responses by 182 respondents.

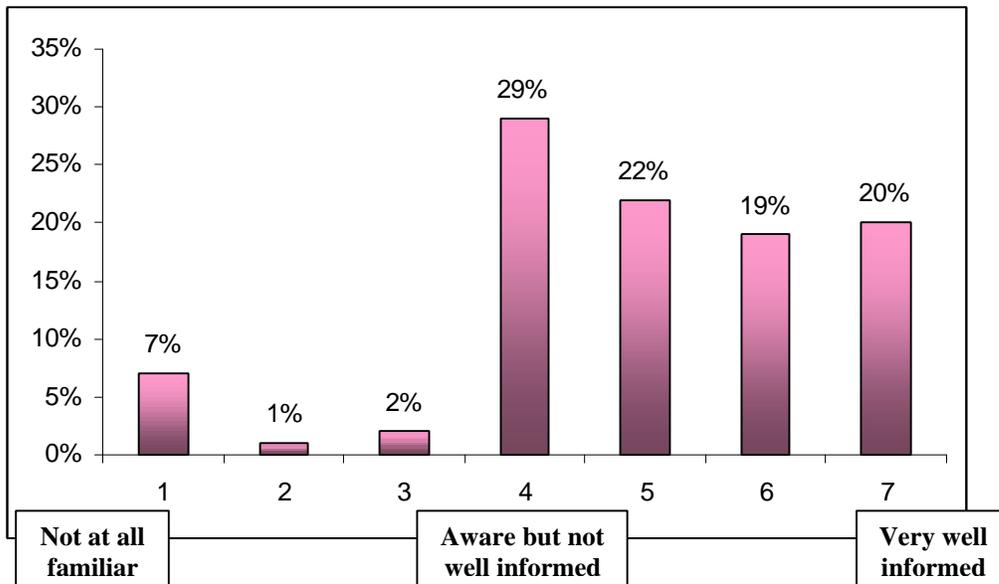
\*\*Respondents could offer more than one suggestion

## RESIDENTS' OPINIONS ABOUT THE STATEWIDE "BED TAX"

During the summer of 1998, the Bed Tax Futures Committee appointed by the Tourism Advisory Council held four meetings around the state to examine the bed tax and its allocation structure. Given the interest in examining the bed tax, it seemed that further exploration of residents' knowledge of the bed tax and opinions on its use would be valuable. Therefore, questions about the bed tax were added to the annual in its annual Resident Attitude Survey beginning in 1998.

Respondents were asked about their familiarity with the bed tax prior to reading a description of it in the survey. Nearly one-third (29%) of the respondents indicated that they were aware but not well informed of the bed tax, and another 19 percent indicated they were very well informed. Only 7 percent indicated that they were not at all familiar with the bed tax (Chart 1).

**Figure 1: Familiarity with the Bed Tax**



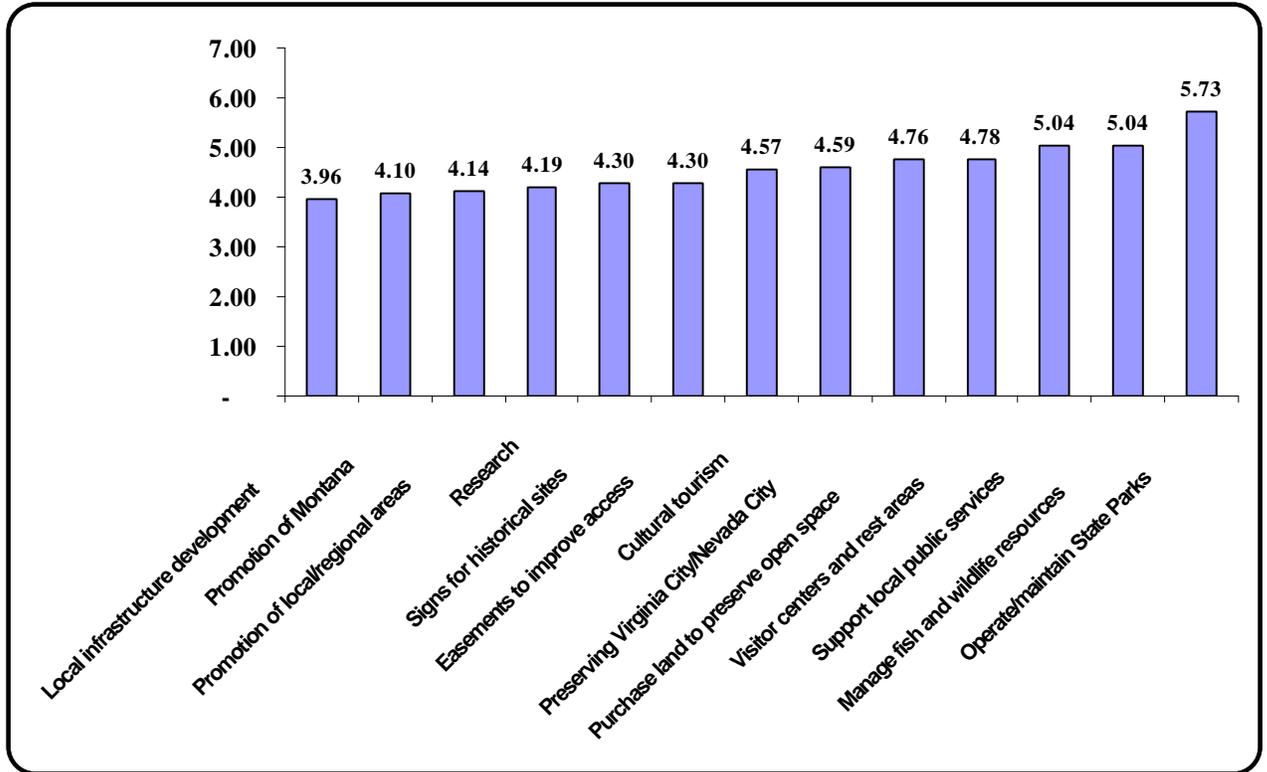
The survey provided this brief description of the bed tax:

Montana currently collects a 4% tax on overnight accommodations (i.e. hotels, motels, resort, private campgrounds). This tax is popularly called the "Bed Tax" and generates revenue to support the tourism industry in the form of research, promotion, signage, etc.

The respondents were then asked to rate 13 items on a priority scale from 1 (low priority) to 7 (high priority) for bed tax funding. The 13 items were derived from the current allocation structure and suggestions brought forward by various individuals and entities during the Bed Tax Futures Committee's public hearings. Note that residents were asked to put items in a *priority* order, and were not asked to indicate how much funding should be allocated to each individual item.

People generally thought that operating and maintaining State Parks, managing fish and wildlife resources, and supporting local public services in high tourist areas were quite important, while local infrastructure development and promotion of Montana came in near the bottom. Chart 2 shows the mean responses for the individual items on the bed tax list.

**Figure 2: Residents' Priority Ratings for Bed Tax Funds**  
(Mean scores: 7=high priority, 1=low priority)



## GENERAL COMMENTS

Respondents were given space at the end of the survey form to include their own thoughts and comments. Thirty-five Montana residents took the time to provide additional comments, which were broken down into more general categories for comparative purposes (Table 21). For a complete list of individual statewide comments, see Appendix C.

**Table 21:** General Comments

	Montanans*
Tourism is an important part of the Montana economy	17%
Tourism has good points and bad points	14%
Tourism leads to overcrowding/over-development	14%
Tourists are rude/demanding	11%
Tourist industry should not have first priority	11%
Tourist moving into the state increase land values/property taxes	11%
No tourism development at the expense of local land owners	9%
A sales tax is needed so tourists can help pay for the services they use	9%
Tourism leads to negative environmental impact	9%

\* Represents comments made by 35 respondents.

## SECTION II: RESIDENT ATTITUDE BY COMMUNITY TYPE

Further analysis was conducted to determine if resident attitudes toward tourism differed depending on where the respondent lived. Respondents were divided into two categories: those who considered themselves living “In town” and those considering themselves living “Out of town”. Fifty-four percent of respondents reported that they live in town, with the remaining 46 percent living out of town (Table 3, p5).

To ease reading, this section only highlights the elements where responses differ according to community type. All other variables did not show any discernable differences, and therefore are not presented. The following summary provides discussion on attitudinal differences.

### Respondent Demographics by Community Type

Respondents living out of town were less likely to be native-born Montanans than respondents living in town (Table 22).

**Table 22:** Respondent Demographics by Residence

	<b>In town</b>	<b>Out of town</b>
<b>Born in Montana</b>	54%	46%
<b>Mean years lived in community</b>	22 years	21 years
<b>Mean years lived in Montana</b>	34 years	30 years
<b>Employment Status</b>	34% Professional 18% Retired 7% Craftsman 6% Self-employed	19% Professional 18% Retired 12% Self-employed 9% Farmer/rancher

### Quality of Life by Community Type

Perceptions of quality of life and tourism's influence on it are valuable pieces of information when examining support for tourism development in any community. Respondents' ratings of present conditions and tourism's influence on particular aspects of quality of life show that while respondents generally agree, there are some differences (Table 23).

Residents living out of town tended to rate the quality of life variables as being in poorer condition than did those living in town. This is especially true when it comes to museums & cultural centers, safety from crime, infrastructure, and traffic congestion. Furthermore, residents living out of town felt tourism has a more negative influence on these factors than did residents living in town.

Respondents living in town felt strongly that the present condition of museums and cultural centers is good, but rural residents were not as content. Both resident groups feel that tourism has a positive influence on museums and cultural centers. However, out-of-town dwellers are not as convinced as town dwellers seem to be.

Both resident groups have a strong sense that they are safe from crime in their communities. Those living in town feel so even more strongly. Whereas this group tends to think that tourism will have either no influence or both positive and negative influence on this condition, those living out of town seem to think the influence will be mostly negative.

When it comes to the existing infrastructure, town dwellers find it to be in good condition. Those living out of town, on the other hand, are not equally satisfied. They do not agree on what influence tourism will have, splitting their votes between “No influence”, “Negative influence” and “Positive influence”. Town dwellers are also split in this respect, but tend to be of the opinion that tourism will have no influence on infrastructure.

Overall, residents living in town rated the present condition of traffic congestion to be good. However, many of these respondents believe tourism has a negative influence on traffic. Those residents living out of town were split regarding the condition of traffic congestion, but seemed certain that with increased tourism, congestion will only get worse.



**Table 23:** Present Condition and Tourism's Influence on Quality of Life Factors by Community Type

	In town	Out of town
<b><u>Museums and Cultural Centers</u></b>		
<i>Present condition</i>		
Good	91%	65%
Poor	5%	24%
Don't know	4%	11%
<i>Tourism's influence</i>		
No influence	5%	9%
Negative influence	--	3%
Positive influence	66%	56%
Both positive & negative influence	17%	15%
<b><u>Safety from Crime</u></b>		
<i>Present condition</i>		
Good	91%	80%
Poor	9%	18%
Don't know	--	2%
<i>Tourism's influence</i>		
No influence	24%	18%
Negative influence	17%	30%
Positive influence	11%	7%
Both positive & negative influence	30%	33%
<b><u>Infrastructure</u></b>		
<i>Present condition</i>		
Good	80%	56%
Poor	18%	35%
Don't know	2%	9%
<i>Tourism's influence</i>		
No influence	34%	28%
Negative influence	19%	27%
Positive influence	11%	23%
Both positive & negative influence	20%	3%
<b><u>Traffic Congestion</u></b>		
<i>Present condition</i>		
Good	64%	51%
Poor	34%	47%
Don't know	2%	2%
<i>Tourism's influence</i>		
No influence	13%	10%
Negative influence	52%	61%
Positive influence	13%	19%
Both positive & negative influence	15%	5%

**Museums and Cultural Centers**

Town dwellers find their museums and cultural centers to be in good condition, and strongly believe that tourism has a positive influence on them. Those living out of town share this tendency of opinion, but not as strongly.

**Safety from Crime**

Although both groups feel strongly that they are safe from crime where they live, they do not agree as to what influence tourism will have. Out-of-town dwellers have a more negative view of the situation.

**Infrastructure**

Residents living out of town are much less satisfied with the conditions of their infrastructure than those living in town. There is no agreement within the group as to the kind of influence tourism will have. Those living in town seem to think that tourism will have little influence on their current infrastructure.

**Traffic Congestion**

Both resident groups are satisfied with the current level of traffic congestion where they live. Both groups are likely to view tourism as having a negative influence on this condition, with out-of-town residents feeling this more strongly.

## Tourism Development and Resident Attitudes Regarding Tourism by Community Type

There were some differences in levels of support for tourism development and resident attitudes toward tourism depending on the respondents' community type. In general, residents living out of town are slightly less supportive of tourism development and exhibit slightly more negative attitudes toward tourism (Table 24).

**Table 24:** Tourism Attitudes by Community Type

	<b>In-town residents who agree</b>	<b>Out-of-town residents who agree</b>
Montana is becoming overcrowded because of more tourists	55%	58%
Tourists do not pay their fair share for services they use	63%	63%
Vacationing in Montana causes too many people to move to Montana	69%	71%
The benefits of tourism outweigh the negative impacts	67%	58%
I will benefit financially if tourism increases in my community	30%	17%

**Residents who live in towns are generally more positive about tourism than those residing out of town.**

## Interactions with Tourists by Community Type

Levels of interaction between residents and tourists affect the attitudes residents hold toward tourism. Also, behavior toward tourists often reflects an individual's attitude toward tourism. Residents living in town have more contact with tourists than do those living out of town. However, both groups are about equally friendly in their interactions with tourists (Table 25).

**Table 25:** Reaction to Tourists by Community Type

	<b>In town</b>	<b>Out of town</b>
<b>My day-to-day contact with tourists is:</b>		
Regular	25%	13%
Somewhat frequent	26%	32%
Infrequent	30%	41%
Almost never	19%	14%
<b>My behavior toward tourists in my county is:</b>		
Make them feel welcome	61%	64%
No specific reaction	30%	30%
Avoid them	9%	6%

**Rural residents have less contact with tourists, but both groups try to make them feel welcome when they do encounter them.**

## Land Use Issues by Community Type

Montana's landscape does not only serve to attract tourists. It is also a link between residents and their state. In general, residents are concerned about the land (Table 26).

**Table 26:** Land Use Issues by Community Type

	<b>In-town residents who agree</b>	<b>Out-of-town residents who agree</b>
I support land-use regulations to help manage future growth in my county	83%	67%
My county is an attractive place to invest in new tourism development	67%	58%
I am concerned about the potential disappearance of open space in my county	71%	73%
There is adequate undeveloped open space in my county	64%	60%
The future of my county looks bright	68%	58%

**Rural residents are less likely to believe their community is an attractive place for tourism development, have a more negative outlook on the future of their community, and are less supportive of land-use regulation.**

**City dwellers are more positive about the future of their community.**

## Economic Development

Future economic development will always be an issue to residents of Montana. However, not all residents agree on which types of industry offer the best opportunities for success. Tourism/recreation ranked fifth among out-of-town residents, and fourth among in-town respondents (Table 27).

**Table 27:** Best Economic Development Opportunities by Community Type

<b>Rank*</b>	<b>In town</b>	<b>Out of town</b>
<b>1</b>	Services	Agriculture/ Agribusiness
<b>2</b>	Retail/ Wholesale Trade	Retail/ Wholesale Trade
<b>3</b>	Agriculture/ Agribusiness	Manufacturing
<b>4</b>	<b>Tourism/Recreation</b>	Services
<b>5</b>	Manufacturing	<b>Tourism/Recreation</b>
<b>6</b>	Wood Products	Wood Products
<b>7</b>	Mining	Mining

\*1=best opportunity, 7=worst opportunity



## **SECTION III: IMPLICATIONS FOR MONTANA**

The following section provides suggestions for policy makers, planners, and marketers based on resident attitudes toward tourism. While additional suggestions could certainly be made, those presented here are the most obvious based on survey results.

### **Policy Implications**

In terms of economic development, the tourism industry should not be at the top of the list. This industry is a part of the overall economy, but not a leader. Residents do not wish it to be the top industry and policy makers should see it in the same light.

Residents suggest that the bed tax funds should be partially used to help protect the environment through operating and maintaining state parks and managing fish and wildlife resources. Purchasing land to preserve open space is also high on the list. The support for local public services is seen as an important use of the bed tax dollars, as is the building and maintenance of visitor information centers and rest areas. The funding source should also support cultural tourism, promotion and research, in addition to improved signage and improved access to public lands.

Residents are willing to support land-use regulations that will protect “their” land. Montanans are afraid that what they love the most will disappear, and indicate that they will support legislation that ensures the continued existence and maintenance of open space and scenic beauty.

Tourism promotion to out-of-state visitors should be continued. Residents see the value of promotion by the state, and think it benefits their communities economically. However, this should not be done at the expense of land, wildlife, recreation resources or local services.

### **Planning Implications**

While much of the tourism industry is contained within the private sector, it has a large impact on the public. Ignoring the views of the public will create negative feelings about the tourism industry. It is advisable to involve the residents, not just the private sector, in all aspects of the tourism planning process. This can be accomplished by meeting with focus groups in communities of different sizes around the state, and invite public comment on tourism development projects. Rural residents tend to be more reserved about tourism, but need to be involved in planning for their area as well.



By planning into the future, land-use regulations can be used to safeguard against the disappearance of open space, and to control growth and provide residents with security about the future. To ensure that the benefits of increased tourism are felt throughout the state, museums and cultural centers should be developed in both large and small communities as well as rural areas of Montana. Parks and recreation areas are a benefit to residents and nonresidents alike, and should be developed and maintained across the state.

## **Marketing Implications**

With the majority of Montana residents making an effort for tourists to feel welcome, resident interaction with visitors should be welcomed. If residents willingly welcome visitors into their area, it will foster better visitor-resident relationships. By reinforcing the positive influence tourism has on the availability of jobs, and the experience that comes with tourism employment, more residents can come to see the benefits of the industry.

Over one-third of respondents who live in towns, and 47 percent of those living out of town say their traffic congestion is bad. Both groups feel that tourism's influence on this condition is negative. This seemingly obvious correlation indicates that many of these residents feel congestion occurs *because* of tourists. Traffic analyses can be conducted to determine the number of resident versus nonresident vehicles, as well as the number of people per vehicle. This way, the nature of the traffic problems could be determined, letting residents know whether they are tourism related. With the problems properly identified, it is easier to address how they may be solved.

In a previous study conducted by the Institute for Tourism and Recreation Research, it was found that approximately 35 percent of the gasoline tax collected in the state is paid by nonresidents. Yet, residents perceive tourism's influence on road conditions to be negative. The tourism industry could make their point that the influence is actually positive in terms of money generated. Without the extra \$60 million for road repair, Montana roads would be in much worse shape than they are currently.

**APPENDIX A:**  
**STATEWIDE SURVEY INSTRUMENT**







**APPENDIX B:**  
**ADVANTAGES AND DISADVANTAGES**  
**OF TOURISM DEVELOPMENT**

## **Advantages of Tourism Development\***

- Economic benefit (more income, more jobs, increased business, etc.)
- No advantage
- More things to do
- Getting to know people from all over the world
- Promotes cultural diversity
- Increase in service industries
- Increased support for preservation of wilderness
- Supports art/culture development
- Attracts businesses to area
- Potential for reduced taxes for residents
- Community pride
- Development of public parks, services
- Promotion of communities
- Benefits tourist/travel agencies
- Better than extractive industries
- Sharing
- Parks and recreation areas

## **Disadvantages of Tourism Development\***

- Congestion/crowding
- Tourists want to move here/do move here
- Environmental impact/strain on environment
- Increased cost of living
- Increased pollution
- No disadvantage
- Increase in crime/loss of safety
- Strain on infrastructure
- Increased number of low-income jobs
- Only seasonal influx of income
- Increased taxes to provide new services
- Disturbs community intimacy/atmosphere
- Disrespect for the Montana way of life
- Strain on state services
- Lack of lodging
- Excessive development
- Disruptive visitors
- Loss of open space
- Transients—only stay for a short time period
- Few benefits
- Rude people
- Does not benefit majority of Montanans
- Loss of privacy/peace and quiet
- Decrease in recreational opportunities for residents
- Decrease in production
- Negative impact of motorized transportation by tourists

\*Represent responses to open-ended questions

**APPENDIX C:**  
**STATEWIDE COMMENTS**

## **STATEWIDE COMMENTS** (verbatim, spelling corrected)

Tourism has some good points and some bad. But you can't have everything, "I guess." With all the storm's and such I really don't know how those people live where they do. Some are bound to get sick of it and move. Montana's a big enough state "so far we still have some room left." The western part will suffer first as Bozeman and Missoula - Kalispell have already. "But you can't have everything". Oh well.

Regarding tourism's influence on cost of living: does "positive influence" mean that cost of living goes up ("positive") or down ("positive" for us, but it's in a negative direction)? I don't think you'll be able to interpret answers to this question in a meaningful way. Otherwise, your instrument is nicely done - good cover letter, too.

Though tourism is an important part of Montana's economy, it's promotion should not take place at the expense of local landowners or in preference to more permanent industry.

Let's adequately support our local Chamber of Commerce in their effort to promote local tourist attractions. Who knows better how to sell their own area best? State wide advertising is very important -but lets get more help to local interests and attractions.

The best thing we could do is provide jobs for our kids. We educate them and have to send them to other states for a decent wage and a job only because my daughter is in the health profession could she remain in state. Both are college graduates. Our grandchildren both go to universities out of state and I am 100% certain they'll live in another state and maybe will one day be tourists. Tourism will put all individuals working in this state at the poverty level. Look carefully at how much the per capita increase has dropped since the early 1970's.

I have mixed feelings about the tourism industry. It creates some jobs, but most are very low paying – not enough to support a family. It is highly overrated by some. Many of the people classified as tourists are really not. The promoters of tourism count every salesman, every person travelling through the state including people who are here to visit family or some other reason not related to tourism. I feel very strongly that a portion of the bed tax money should go to state and local government to cover some of the added costs that tourists bring.

If the state would give as much interest for the oil industry and agriculture as they do tourism we wouldn't be in such need.

The questions you asked in some cases, there wasn't an answer for them. Tourism is only for a few months. The economy of the state needs to work in other areas besides tourists. Particularly in bringing industry, businesses, and other job related areas to

We should have a sales tax tied to income tax and real estate tax reform.

The current tax structure is preventing the states economic development. Reduce fuel taxes - they unfairly burden low income families. Reduce Income Tax - they deter industrial growth. Reduce Property Taxes - they inhibit growth. Increase "Bed Tax" - 8% - 50% to tourism, 50% to general fund, consider exemptions Montana residence. Institute 6% sales tax (food exempt). Reduce auto registration fees - they prevent lower income families from purchasing newer more fuel efficient cars. The federal government has not seen fit to subsidize the tourist services industries. I can see no obvious reason why the state should. With Yellowstone and Glacier Parks. Providing the summer draw and skiing a winter opportunity, I feel any effect of advertising is only in the minds of the ad agencies

I am obviously negative about having Montana become a crowded area. Six billion people in the

world - Insanity!! I cannot believe how much this beautiful pristine state has gone to hell. I can remember when you could sagely drink the water from almost any stream and enjoy the serene quiet and tranquility of the area. There is very little of this left, so I guess the reality is that the "do-gooders" will continue to attempt to make this state into another Denver or Los Angeles. I guess I'm old enough I may not have to worry too much about it.

When we travel outside of Montana we try to be considerate of the area we travel through and friendly to the people we come in contact with, however, the majority of the tourists that come through our town are rude and demanding. It is as though they think we owe them a good time.

We could make millions from tourism if we had a sales tax!

Tourism is the bread and butter of our community. However our water systems and sewer (septic tank) are a major problem for expanding either residential or commercial areas. If Yellowstone in the future restricts summer and winter visitors (reservations or whatever) and YNP is going to do something along that line- Gateway communities may suffer as much from increased tourists as they might from decreased numbers of tourists.

Thank you for your research. There are many competing interests and perspectives here..... The federal government tells us recreation/tourism is our future economy..... But the greatest use here is motor vehicle pleasure driving- and more and more of our roads are closed every year, severely limiting access to public lands and concentrating activity more and more in the remaining open areas. Something is terribly wrong with this picture..... It doesn't add up....It is harder and harder to subsist with accessing firewood, huckleberries, fish and game, etc.... On public lands we may have to move as many of our friends and family have already.....

The main advantage of tourism is that it can increase the number of supporters of preservation of our natural environment. Think the winters will help to keep inward immigration under control.

I find surveys difficult because I pride myself in being able to look at things from many points of view. In general, I think tourism is an OK way to use some of what we have here in Montana to support "life as we know it." I'd like to see "life as we know it" make some major changes but the pressure needed for that will be determined by "the fates."

I know we need tourism but I think it must be regulated. Those who do buy here are taking over farms and our hunting and fishing areas and making them a money making thing for themselves and buying up land for the out of state people to come in and hunt and fish.

I'm not really against tourism after all I become a tourist myself when I travel. I just hate to see the negative impact they (including myself have had on our National Parks: Glacier/Yellowstone). It's a tough issue because we do need more industries in Montana, and it seems tourism has been the thrust by our state. I'd like to see more small technological businesses locating here. I'll be anxious to hear about the results.

Our rapid growth is causing unfriendly people, due to no growth plan, no building regulations except right in town. People with money moving in and thinking they can do as they please, ie. Moving county roads, hoarding adjudicated water, hazing wildlife to keep on their property. Our friends who have visited complain mostly about too few services

The real problem in Montana is the fourth largest state with a population of less than one million. This creates very little economic base of core business. The original ones are under attack. They are mining and wood products. Most of the attitudes are from out of state groups funded by money from out of state. Until Montana residents make it clear that we will be out numbered and out spent by out of state efforts. We must capitalize on the open space of the state by tourists and support

growth of core industries. This is the question to be answered.

Montana is a wonderful place to live. But when out of state people buy up all the land it makes it extremely difficult for hard working people like me to buy a house for my family and resort to paying high rent and have nothing to show for it. I know there is nothing I can do about it, I just wish it would stop. Maybe we will have a terrible winter and all the pansy Californians will go back to where they came from.

My chief concern regarding the Whitefish area is that in time it might become another Aspen, where service area workers would be unable to live here because of inflated land and housing prices. However, as long as the economy remains mixed - railroad, tourism, retirement center, the likelihood of that happening are somewhat reduced. Additionally, it saddens me to see the beautiful vistas and rich farmland of the Flathead Valley give way to suburban sprawl - progress, they call it.

We have lived in Bigfork such a short time. I am sorry that we are not able to complete the survey with constructive opinions. We feel that Montana and each of its cities and towns is losing such a valuable source of income by not implementing sales tax. It would benefit your permanent residents so much to lower property taxes and allow the tourists who use your roads and facilities to help pay for them with a reasonable sales tax. The city where we lived for the past 20 years has utilized a one cent capital facilities tax to improve the streets, build a new county building, fire station, jail (correction center), just to name a few of the accomplishments. (The voters vote on the proposed expenditure -- and the most recent proposals were voted down.) Thank you for this opportunity to express an opinion as a newcomer to this beautiful state. We have chosen Montana as our retirement home and hope we can contribute as interested citizens.

I see tourism as a potential #1 industry- since environmentalists have caused the demise of all mining in this area (ASARCO- Noranda-WR Grace Vermiculite mine) and greatly curtailed our logging industry. It becomes necessary to attract some type of industry to this community... Otherwise, we will be old retired folks who live here just for the scenery.

I think Montana is a great state and a beautiful state--need industry better wages.

Everyone is so busy trying to close down our state of Montana- they are going backwards- I thought we are suppose to be progressing and going forward in life- the things we use to do and was good for us- we can't do any more. We have to keep it for our children- That saying is getting so ridiculous- There won't be anything for our children to do. They will have everything closed down- the parks will be closed to everyone but the ones that can afford to rent a coach to drive them around and dictate to them where they can stop and look. Our forests will be closed for recreation and logging. They can put a hunting season on the Grizzly Bear- to put a little fear back in them- our fore fathers would cringe to think they worked so hard to go forward and people want to go backwards.

Montana is one of the last US frontiers, lets keep it that way. Limit out-siders, that we can control our future influx.

While supporting moderate growth, I am concerned by the population boom of certain areas, especially Western Montana and Bozeman areas. Everyone wanting their own private piece of Montana has changed the feel of the long stretches of open country by parceling the land into small chunks. Many of these "chunks" are owned by out-of-staters with significantly more income, who use the land for only a week or two a year, yet tie it up and make it inaccessible (both physically and financially) for the average Montanan. For example, Flathead Lake used to be full of moderate cabins used by middle income families for swimming, boating, and fishing on weekends. It is now full of million dollar mansions whose owners come from out-of-state to enjoy the view for two weeks. Locals can no longer afford lake property. It's a shame.

I think tourism is okay but we shouldn't base our future on tourists. In order to let people tour Mt we have to loose our original free way we've always enjoyed the uncontrolled & unrestricted ways to explore parks, forests etc. b/c the more people the more govnt takes away & restricts. For instance, metal & paved paths at Glacier & fences, etc. when before last year you could walk freely over the side

I was raised in Western Montana where fresh water, mountains, trees and wildlife were in abundance- now with people from the east, West Coast and Florida finding the beauty and open spaces here I feel we're in for big trouble; more crime and less of our spaces due to growth less farmlands, trees and now our water will be polluted. So I guess bring on the people and I feel we'll lose our Montana.

It is my opinion that the University of Montana and their promotion of the tourist industry has contributed to the destruction of the life style that native Montanans use to be able to take pride in.

Note that I reside in Big Fork, a small community particularly dependent on tourism. While Bigfork is much changed from my memories of it as a boy in the 1950s, it is a VERY pleasant place to live thanks in large part to successful exploitation of tourism sector opportunities.

I truly hope that tourism can compete economically w/ the extractive industries that are ruining our state's landscape. I would rather have oodles of people admiring Montana that a few reeking havoc with the land.

Excellent questionnaire. In the past 46 years Montana has slowly lost its "Last Best Place" status. Destruction of our fertile agricultural valleys and forest lands by developers, subdividers, etc. must stop. Most of this has come about from the demands for the 'quick buck' and the demands of the tourist who thinks he wants to stay-but has no idea how he'll make a living here or contribute to the community. In the high tourist months our otherwise excellent highways are glutted with traffic-out of state. Making the highways wider etc. will only encourage the problem. We must have statewide, through the counties, zoning of all lands so that uncontrolled and improper use of land will not occur. Agricultural crop and forest land, wildlife land should be number one priority. Industrial and housing land should be strictly controlled.

Let's take care of our own first before spending all this money out for tourism.