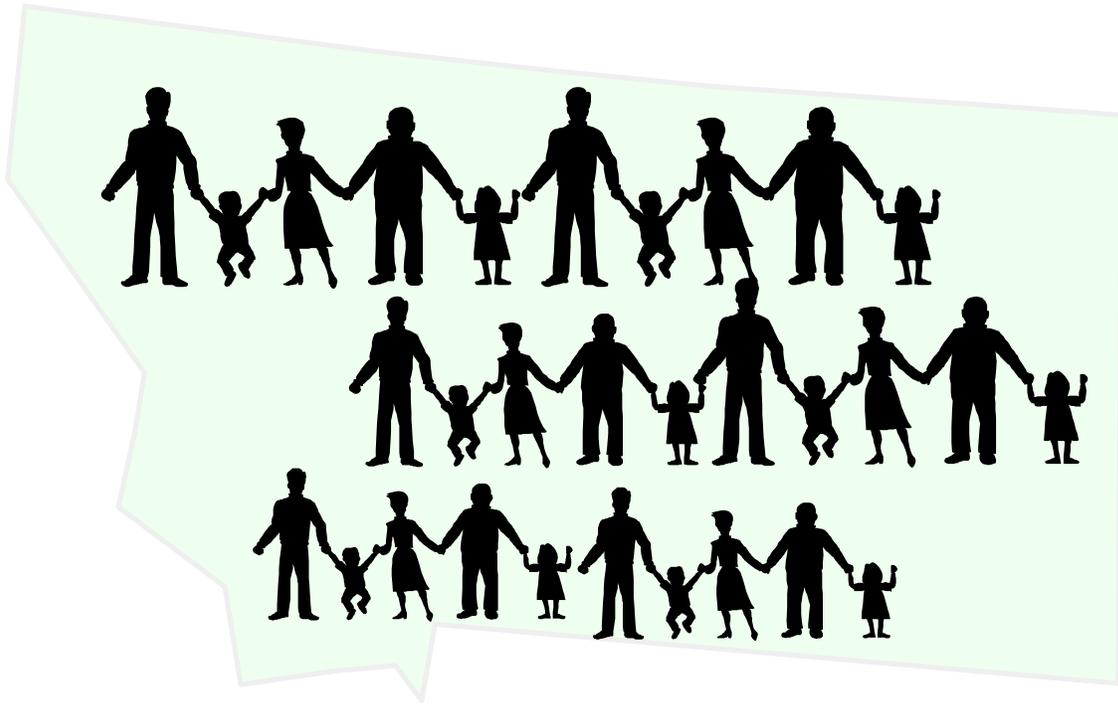


Residents' Opinions about Montana, Their Community, and Tourism



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Excerpts from the 1997 CTAP Report 53 with additional comments

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Executive Summary

The following report was extracted from ITRR's research report 53, *Montana Communities Explore Tourism Potential*. The executive summary and the summary and conclusion section have been written specifically for this report.

- Residents were asked to comment on their personal life, their community and the state and discuss their perception of tourism in relation to their life, the community and the state.
- A 39% response rate was attained for the mail-back survey in the fall of 1997.
- The respondents mean age was 52 and they have spent 73% of their life in Montana.
- The respondents are attached to their community and strongly believe that they should be involved in community decisions about tourism.
- Two-thirds of the respondents believe their community is growing and 47% of them say their community is changing too fast and that their roads are too congested.
- Respondents believe the condition of Montana's natural environment is quite good but the economy is not as good.
- Respondents believe that the condition of their community's emergency services is quite good, but the job opportunities are poor.
- Tourism's influence on the state's economy, cultural and historic preservation, and parks and recreation are perceived as positive while tourism's influence on the natural environment and highways and roads are perceived as negative. Overall, respondents believe that tourism's influence on the state is slightly on the positive side.
- Tourism's influence on three community statements are positive (museums and cultural centers; parks and recreation areas; job opportunities). Tourism's influence on another three statements is perceived as neutral (education system; emergency services; overall livability). Tourism is perceived to have a negative influence on the community's infrastructure, safety from crime, cost of living, and roads.
- Tourism's influence on the individual is perceived as positive in terms of their employment situation and financial situation, but as negative in terms of their housing as well as their leisure time and activities. Overall, tourism is perceived as a negative influence on the individual.
- Respondents tended to agree to various statements about tourism development and promotion. More respondents agreed to the need for tourism promotion than perceived that they would benefit financially if tourism increased in their community.
- 68% of the respondents said the main advantage to increased tourism is an improved economy while 32% of the respondents said that the main disadvantage of increased tourism is traffic and congestion.
- Open-ended comments on the survey showed:
 - 13 positive comments related to the need to continue tourism as a benefit to Montana.
 - 20 positive/negative comments mentioned both the pros and cons of tourism in Montana.
 - 20 negative comments ranged from low paying jobs to tourists destroying our state to don't destroy our quality of life.
 - 65 neutral comments/suggestions included what should be promoted to other ways to improve the state to tax related issues

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Residents' Opinions about Montana, Their Community, and Tourism

Data for this report came from the ITRR Resident Opinion Study conducted in the fall of 1997. The survey was mailed in conjunction with the Community Tourism Assessment survey (see ITRR report 53)

Methodology: The Montana Resident Opinion Study

A mail-back questionnaire was administered to a statewide sample of residents during October 1997. That 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 Response Considerations

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

The reader is cautioned to remember that these results represent opinions from about forty percent of those residents polled. It was assumed that respondents did not differ from nonrespondents in their opinions. Table 1 summarizes sample sizes and response rates for the Resident Opinion Study.

Table 1: Study Sample Size and Response Rate

	Statewide
Resident questionnaires sent out:	1,000
Undeliverables:	37
Resident questionnaires returned:	378
Resident Opinion Study response rate:	39%
Female/male response ratio	53/47

Resident Characteristics and Opinions

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

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

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

- 1) Respondent profile and level of attachment to place.
- 2) Importance of and condition of personal, community, and statewide issues.
- 3) The influence of tourism on personal, community, and statewide issues.
- 4) Support for tourism development.

To summarize results, several indexes were developed through a weighted average of the means. Indexes were calculated for “attachment to place,” “perceived condition of well being,” “tourism’s influence,” and “tourism support.”

Respondent Characteristics

A person’s employment status, type of job, and economic work sector can all influence personal well-being and support for tourism. In general, the more dependent a person is financially on the tourism industry, the higher the support for tourism. Table 2 shows employment status of the respondents. Table 3 lists the economic sector that the respondents worked in. Table 4 indicates the respondents’ job title or type of occupation. Table 5 presents the respondents’ community size.

The majority of respondents to the survey were employed, were in the services sector, and were professionals or managers. One-third of the respondents were retired. Fifty-five percent of the sample lived in a community larger than 20,000, followed by 25 percent who lived in a rural area.

Table 2: Employment Status of Resident Respondents

Employment Status: (could be more than one)	Statewide %
Employed	44%
Retired	31%
Self-Employed	24%
Homemaker	14%
Unemployed	3%
Student	3%



Table 3: Employment Sector of Resident Respondents

Employment Sector:	Statewide %	Employment Sector:	Statewide %
Services	23%	Public Utilities	2%
Health Care, Medical Services	12%	Transportation Services	1%
Education	10%	Logging, Forestry, Wood Products	1%
Agriculture	9%	Mining	1%
Retail	8%	Food Service, Restaurant	1%
Construction, Repair, Maintenance	8%	Automotive Services	1%
Professional Services	7%	Oil and Gas	1%
Government	5%	Manufacturing	1%
Visitor Services, Art, Entertainment	4%	Wholesale	1%
Media, Communications	3%		

Table 4: Employment Type for Resident Respondents

Job Title:	Statewide %	Job Title	Statewide %
Professional	33%	Craftsman	5%
Manager	30%	Laborers	3%
Service Workers	7%	Transport	3%
Clerical	7%	Farm labor	<1%
Farmers	6%	Armed Services	--
Sales	6%	Operatives	--

Table 5: Respondents' Community Size

Community Type:	Statewide %
Community of 20,000 or more	55%
Community of less than 20,000	20%
Rural area	25%



Attachment to Place and Change

One measure of community attachment is the length of time and percentage of life spent in a community or area. Table 6 lists years in Montana and in the community as well as how much of the respondent's lifetime that represented. Another measure of community attachment is based on opinions about the community (Table 7). Finally, Table 8 presents the degree to which respondents felt their community was growing and at what rate.

The average age of statewide respondents was 52 years. On average, these respondents have lived in Montana 73 percent of their lives and in their community 46 percent of their lives. In general, the higher percent of life one lives in a community, the more likely one is to be attached to that community.

The Index of Community Attachment (i.e., the mean averages) in Table 7 indicated that statewide respondents were quite attached to their community. At an average rating of 3.1 (on a scale with 4 as the high), these residents like where they live. Only ten percent of the respondents were unable to honestly say whether the future of their community looked bright or not. The highest response came from involvement in community tourism decisions. It appears that citizens in the state felt very strongly that they should have a say in these types of decisions.

In summary, respondents around Montana were attached to their community even though nearly half of them felt that the roads were too congested and that their community was growing too fast. This indicated a potential increase in community involvement in communities throughout Montana.

Table 6: Respondents' Residency Characteristics

Residency:	Statewide
Mean years lived in community	24
Mean years lived in Montana	38
Age (Mean Years)	52
Percentage of life spent in community	46%
Percentage of life spent in Montana	73%

Table 7: Community Attachment Statements

	Statewide**
It is important that the residents of my community be involved in decisions about tourism	3.3
If I had to move away from my community, I would be very sorry to leave	3.3
I'd rather live in my community than anywhere else	3.1
I think the future of my community looks bright	2.8 (10%)*
Index of Community Attachment	3.1

* % of respondents who indicated "Don't Know" on the survey (if 10% or more).

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

Table 8: Perceptions of Community Growth

	Statewide %
How is the population changing in your community?	
Growing	78%
Decreasing	7%
Not changing	15%
If changing, is your community changing..	
Too fast?	47%
About right?	49%
Too slow?	4%
Overall, are the roads in your community too congested?	
% Yes	47%

The Importance of Factors of Well-Being

When evaluating the potential for tourism development, it is necessary to gain an understanding of residents' perceptions of the impacts of tourism and to determine which impacts should receive more focus. For example, if we know that access to local government and the environment are perceived to be in poor condition, but only the environment is rated as an important aspect of well-being, then we have a better idea of where to focus development and planning efforts.

To that end, respondents rated the importance of various aspects of well-being. While items such as personal health and family relations are beyond the influence of tourism planning efforts, it is helpful to know the relative importance of those factors in relation to factors that tourism development can influence.

Table 9 is a listing of various aspects of personal well-being in order of most important (rating equal to 4) to not at all important (rating equal to 0). Results showed that all aspects are important, but some aspects were slightly more important than others.

Table 9: The Perceived Importance of Factors of Well-Being

The Importance of to your current well-being:	Statewide*
Personal health	3.6
Relations with family and friends	3.5
Safety from crime	3.3
Financial situation	3.1
Education system	3.0
Natural environment	3.0
Employment situation	2.9
Crowding and congestion	2.9
Housing	2.8
Leisure time and activities	2.7
Access to government	2.4



* Scores represent mean responses measured on a scale from 4 (Most Important) to 0 (Not at all Important).

Perceived Conditions of Montana, the Community, and Personal Well-Being

When evaluating opinions about the benefits and costs of tourism development, it is helpful to have an idea of how respondents perceive current conditions of various aspects of their well-being. For example, if a particular resource is in poor condition, any negative influence on it by tourism development would be serious. Respondents were asked to rate the current condition of various aspects of well-being on a scale of very good (rating equal to 4) to very poor (rating equal to 1). Conditions of well-being were rated at three levels: the state of Montana, the respondent's community, and the individual respondent. Tables 10-12 present these three levels of conditions and their mean rating.

In general, respondents of the sample rated their personal condition slightly higher than the condition of their community and the state. The ratings were generally toward the good and very good categories indicating that respondents throughout the state believed they are doing well, the community is doing well, and the state is doing well.

Table 10: The Perceived Condition of Montana

The Condition of Montana's:	Statewide*
Natural environment	3.3
Parks and recreation areas	2.9
Cultural and historic preservation	2.8
Highways and roads	2.4
Economy	2.2
Montana's Condition (Index score)	2.7

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

Table 11: The Perceived Condition of the Community

The Condition of the Community's:	Statewide*
Emergency services (police, fire etc.)	3.2
Overall livability	3.0
Education system	2.9
Parks and recreation areas	2.9
Safety from crime	2.8
Museums and cultural centers	2.8
Infrastructure (water, sewer etc.)	2.7
Cost of living	2.3
Roads	2.2
Long-term development planning	2.1
Job opportunities	2.0
Community Condition (Index score)	2.6

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

Table 12: The Perceived Condition of the Individual

The Condition of your personal:	Statewide*
Overall happiness	3.3
Present housing	3.2
Leisure time and activities	2.9
Employment situation	2.8
Financial situation	2.8
Access to local government	2.6
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Individual Condition (Index score)	2.9

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



Perceived Influence of Tourism on Well-Being

An indication of support for tourism is the perceived influence of tourism on various aspects of well-being. Respondents were asked to indicate whether tourism influenced a particular aspect of well-being positively, negatively, or equally positively and negatively. Responses were scaled from -1 to +1 with a score of 0 being equally positive and negative. Respondents were asked to evaluate tourism’s influence at three levels including the state of Montana, the respondent’s community, and the individual respondent. Tables 13 - 15 present the perceived influence tourism has on each item. The closer the score is to one, the more positive an influence tourism has on that item. Conversely, the closer a score is to a negative one, the higher negative influence tourism has on that item.

A summary index of tourism’s influence on well-being was developed from the individual items for each level of influence. The index scores represented an average of the items in each table.

Tourism’s overall influence on the state was perceived as positive. Two items, highways and roads (-.28) and the natural environment (-.02) received negative influence ratings. However, these ratings were not substantially negative to offset the positive ratings of influence tourism was perceived to have on the state’s economy and cultural/historic preservation.

The index rating of tourism’s influence on the community was lower than the rating for the state. The perception was that tourism has a positive influence on three items (museums/cultural centers, job opportunities and parks/recreation). Three items received ratings of “both positive and negative” (education system, emergency services, and overall livability). Tourism was perceived to have a negative influence on infrastructure, safety from crime, cost of living, and roads in the community.

Statewide respondents perceived tourism to have a slightly negative influence on themselves as individuals. Most specifically, respondents believed that tourism negatively influences their present housing and their leisure time and activities.

In summary, a statewide sample of respondents believed that tourism has a strong positive influence on the economy as well as on culture and history. On the other hand, tourism negatively affects roads and safety from crime, cost of living, and leisure time and activities.

Table 13: Tourism’s Perceived Influence on Montana

Tourism's Influence on Montana's:	Statewide*
Economy	.54
Cultural and historic preservation	.35
Parks and recreation areas	.11
Natural environment	-.02
Highways and roads	-.28
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Tourism Influence Index	.14

* Scores represent mean responses measured on a scale from 1 (Positive) to -1 (Negative).

Table 14: Tourism’s Perceived Influence on the Community

Tourism's influence on the community's:	Statewide*
Museums and cultural centers	.64
Parks and recreation areas	.28
Job opportunities	.28
Education system	.07
Emergency services	.02
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Overall livability	.01
Infrastructure (water, sewer etc.)	-.19
Safety from crime	-.33
Cost of living	-.21
Roads	-.43
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Tourism Influence Index	.03

* Scores represent mean responses measured on a scale from 1 (Positive) to -1 (Negative).

Support for Tourism Development

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. Respondents were asked to strongly agree, agree, disagree, strongly disagree or indicate “don’t know” for a number of tourism-related questions. Responses were coded on a scale from 4 for strongly agree to 1 for strongly disagree. Results should be interpreted as follows: a score of three or higher indicates a positive opinion, a score of two or less indicates a negative opinion, and a score of 2.5 indicates a neutral position.

Some questions addressed general support for tourism development while others addressed more specific aspects of tourism. Table 16 presents opinion scores for the tourism support questions and a summary of those scores (i.e., the Tourism Support Index, which is an average score of the five items in the table). Table 17 provides an indication of tourism growth concerns for the state and for the respective communities.

Opinions about tourism at the statewide level appeared to be close to neutral. Using 2.5 as a benchmark

Table 15: Tourism’s Perceived Influence on the Individual

Tourism's Influence on personal:	Statewide*
Employment situation	.21 (63%)**
Financial situation	.17 (60%)**
Overall happiness	.01 (50%)**
Present housing	-.10 (69%)**
Leisure time and activities	-.20
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Tourism Influence Index	-.01

* Scores represent mean responses measured on a scale from 1 (Positive) to -1 (Negative).

** Percent of respondents who indicated "No Influence" on the survey (if 40% or more).



for neutral support, the overall index of 2.7 indicated people were on both sides of tourism support. Tourism growth concerns were also close to the middle point for each item. The item with the highest agreement was the willingness to support land-use regulations to control growth in the community (2.9).

Table 16: Statements of Agreement with Various Aspects of Tourism Development

	Statewide*
Tourism promotion by the State of Montana benefits my community economically	3.0 (13%)**
To be competitive with other states, I support continued tourism promotion by the State of Montana	3.0 (5%)**
The overall benefits of tourism outweigh the negative impacts	2.8 (18%)**
Increased tourism would help my community grow in the right direction	2.5 (19%)**
If tourism increases in Montana, the overall quality of life for Montana residents will improve	2.3 (22%)**
I will benefit financially if tourism increases in my community	2.3
Tourism Support Index	2.7

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

** Percent of respondents who indicated "Don't Know" on the survey (if 10% or more).

Table 17: Statements of Agreement about Tourism Growth Concerns

	Statewide*
I would support land-use regulations to help control the type of future growth in my community	2.9 (14%)**
Taking a vacation to Montana influences too many people to move to Montana	2.8 (14%)**
In recent years, the state is becoming overcrowded because of more tourists	2.6 (14%)**
Tourism is the major contributor to traffic congestion in my community	2.5
Tourism Support Index	2.7

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

** Percent of respondents who indicated "Don't Know" on the survey (if 10% or more).

Advantages/Disadvantages of Tourism Development

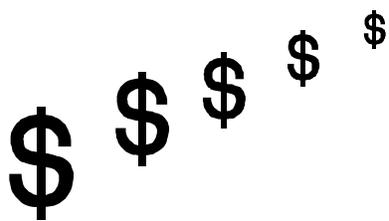
To further clarify the perceived benefits and costs of tourism development, respondents were asked to provide the top advantage and main disadvantage of increased tourism in their community. This was an open-ended question with respondents providing their own thoughts and wording. The suggestions were then assigned to general categories for comparison. Table 18 lists the top advantages and Table 19 lists the main disadvantages of increased tourism.

Sixty-nine percent of respondents indicated the economy and more employment as the top advantages.

Traffic and congestion was the main disadvantage for respondents.

Table 18: Top Advantage of Increased Tourism in Community

Top Advantage:	Statewide %
Improved economy, More dollars for business	68%
More employment	10%
None (No Advantage)	9%
Increased development (gas stations, restaurants, etc.)	3%
Don't know	3%
Encourages focus on mountains, Environment	2%
Increased recreational activities	1%
Advertisement of community exposure	1%
Lower property taxes	1%



Comments

The following section consists of the verbatim comments that were received from statewide survey respondents. On the back of the questionnaire, respondents were given the opportunity to offer support, suggestions, concerns, and other comments about tourism. Comments represent feelings of the respondents that are difficult to assess using the quantitative methods. Therefore the comments provide additional insight. Fortunately, many of the respondents offered usable comments, providing a good representation of the variety of feelings held by residents.

These comments provide a good read on the true pulse of the residents and offer many constructive suggestions for appropriate improvements. The comments are arranged in four categories represented by the symbols +, +/-, -, and 0. The categories are defined loosely as follows:

+ Comments generally favoring tourism development or offering suggestions for improving tourism in the community. The suggestions were interpreted as the respondent's idea of a positive contribution to improvement, though some may contradict. For example, one respondent may have felt that more wilderness would be beneficial to tourism while another suggested that less wilderness would offer more opportunities. In other cases the comments may sound negative, as in 'downtown is dirty', but were interpreted as 'cleaning up downtown would improve tourism', and thus were supportive of tourism.

+/- These comments usually raised concerns as well as offering suggestions or support. Often respondents offered opinions about appropriate and inappropriate types of tourism. Other respondents acknowledged the benefits of tourism but were worried about growth or

Table 19: Main Disadvantage of Increased Tourism in Community

Main Disadvantage:	Statewide %
Traffic, Congestion	32%
Overcrowding	11%
None (No Disadvantage)	9%
Might encourage people to move here	6%
Don't know	5%
Increase in minimum wage jobs, Seasonal jobs	4%
Prices will increase	4%
Nonresidents competing with locals for activities	3%
Increased crime	3%
Road conditions	2%
More litter & garbage	2%
Tax dollars, Higher taxes	2%
Wear & tear on facilities/Infrastructure	2%
Nothing to do or see, Lack of facilities	2%
Wrong type of people	2%
Increase of infrastructures, Development	1%
More responsibility handling any increase	<1%
Negative attitude towards locals	<1%
Outfitters limiting resident hunting options	--
Lose small town atmosphere	--

inappropriate development. Some respondents identified current problems associated with tourism and offered solutions. In some ways this category of comments is the most insightful because it represents acknowledgment of the benefits and the costs. It represents middle of the road and compromise; or present problems and solutions.

- Comments in this category were not supportive of tourism or presented concerns without offering solutions. Some were just negative in general.

0 These were the 'other' comments that could not be classified as supporting or not supporting tourism. Some presented views on current conditions, but did not credit or blame tourism. Some objected to specific activities like gambling but did not offer comments on tourism in general. Other comments as well as some in the ' - ' category seemed unrelated to tourism. Commenting on current conditions, some were less than constructive. They were included here not because they provided helpful suggestions to decision makers, but because they offered insight to feelings and frustrations found among some people in the state.

It is important to examine the substance of the comments rather than the relative number of each type. In the previous section it was shown that the amount of support for and perceived benefits from tourism. Some of these variations appeared to be related to the type and amount of tourism the respondent had experienced and the relation they had to the tourism economy. While the *amount* of support and perceived *level* of benefit and cost varied, the *types* of concerns that were expressed in the open-ended comments tended to be very similar. In general, concerns about tourism were expressed in the following areas:

- Tourism only offers low paying seasonal jobs that do not provide enough opportunity.
- Tourism only benefits a minority of businesses and people in the community.
- Tourists move here.
- Tourism causes commercial strip development, traffic, crowds, and litter.
- Tourism businesses do not contribute to the overall community livability.
- A tourism economy is not diverse or stable.
- Tourists do not pay their share of the burden.
- Tourism contributes to higher prices and taxes.

Fortunately, many of the comments provided good suggestions for appropriate solutions to those concerns. These considerations and suggestions should be an integral part of the tourism planning effort.

Positive Comments

- + I am very much in favor of taking advantage of our natural resources through tourism. Growth is a positive thing if we are prepared for it. I would favor a greater diversity of artistic (music) events such as high quality jazz, classical, and operatic events.
- + It is a fairly clean industry.
- + I think tourism is vitally important to Montana. We have a beautiful place and tourism money will help maintain the beauty and the animals, so industries/mining that destroy the environment do not have to be the priority. Tourism development does need to be planned and tourists pay in some way for roads and planning.

- + Tourism should be more thoroughly promoted the year around.
- + Improvement of Highway 93 is needed. I would like to see efforts within the community and the chamber of commerce to get people to stop and spend time and dollars in my area.
- + In general, I believe that a robust tourism component to our overall economy provides increased leisure time opportunities for Montanans. We need to invest more in our state parks (like Oregon) to get tourists to slow down and stay a night or two - particularly Yellowstone to Glacier corridor.
- + Tourism can only be a benefit to Montana. It not only provides jobs, it provides money for improvements that benefits all of us.
- + This survey, in the questions asked, seem too slanted towards the assumption that tourism is causing problems that outweigh benefits. Compare tourism in Montana to major tourist areas and it is a drop in the bucket. This state is so empty that tourism and for that matter, the population could double with little impact except in a few congested areas. Get out of the pulp smelling Missoula sometimes and smell the roses. Montana has one of the highest qualities of life in America. Just go to Seattle, San Francisco, LA or any major metro area to appreciate what we have and don't have.
- + Tourism should be encouraged. Secondary roads should be improved. Montana's hotel bed tax should be raised. It's very low compared to many other states.
- + Community casinos I would not like to see promoted. I like the tourism level to stay the same or increase. Montana could use more good jobs.
- + I support continued promotion of tourism in the state. However, it would be good to get a few more tourist dollars that would give some relief to the very high property taxes in the state.
- + I greatly prefer tourism to any business that destroys the environment - I think tourism is preferable to the rapid population growth, but feel the population growth is inevitable, so wish we had better control of the direction of development. I wish our community had public bus service to cut down on the congestion and smog caused by traffic so I wish the tourist had buses to ride and everyone would be willing to use them.
- + Tourism overall is a positive influence on the state.

Positive/Negative Comments

- +/- I am ambivalent about tourism. I recognize the economic impact and jobs that are created. At the same time, I see over-use of parks and recreational lands (which are underfunded and deteriorating), increased congestion on roads and infrastructure. Also, as Montana gets more attention, we get destination areas (Big Sky, Whitefish, etc.) which become enclaves of wealthy non-Montanans who have impact locally (and usually get their own way) while locals experience increased taxes, strain on infrastructure, etc. Our way of life is changing - the influx of people and money has some good consequences, but I regret the loss of a simpler, more rural, more communal, more sustainable way of life. I think native Montanans are losing control of our own destiny - which more and more will be determined by wealthy outsiders and cooperations exploiting on the environment - just as our natural resources were exploited in the past.
- +/- Encourage tourists to come spend their money and leave the place like they found it.

- +/- The community needs a much broader economic base than tourism oriented. Timber needs to be revitalized as well as mining and manufacturing. Tourists need to be encouraged to bring those things to Montana.

- +/- While I realize tourism is a plus and want to see others enjoy our area, I don't like to see us becoming more "discovered". I don't want to see lots of people moving into the area.

- +/- It is true that tourism brings needed money and jobs to our state, but I have noticed that the rate of decline of our timber and mining industries seem to be directly tied to the increase in tourism. Now these are jobs that pay a liveable wage - not the minimum wage most tourist related jobs are paid. Granted mistakes have been made by both mining and timber industries, but they are learning now to be more friendly to our environment. I really feel that all the motels, campgrounds, roads, and other tourist attractions have a detrimental impact on our environment. Montana made a big mistake when it changed its motto from the "Treasure State" to "The Big Sky State".

- +/- Focus on tourism detracts somewhat from development of services on recreation specified or developed for local citizens. Think the state should assist to develop local recreation opportunities, which could also enhance opportunities for tourists also. We need to develop things for our children not just more casinos. Where is the incentive for carousels, amusement parks, fairgrounds, etc.? These things can be accessed by locals and tourists. HELP!

- +/- Our area does not attract a tremendous tourist trade - we have no major attractions. I believe tourism causes increases in our cost of living and in that way is a negative. Positive aspect is the increased income in a community and local business in a small community need that desperately. I do not think our area could afford much development to attract tourists since there are no major tourist attractions here. I firmly believe Montana is being extremely foolish, financially, by not having a sales tax. We Montanans pay sales tax when we go to the other states so why not have tourists pay a sales tax here to help finance road improvements and other services that suffer from increased usage by tourists? I wonder how many dollars of income Montana really misses out on for not having a sales tax.

- +/- We would like to see more good restaurants and more activities for 18 - 40 ages. I've always thought we should stress more tourism but by doing that the environment may suffer as will prices for local residents. Difficult to have one without the other.

- +/- Tourism is a mixed blessing in our community. It is often taken for granted because of our proximity to Little Bighorn Battlefield and Big Horn Canyon, but those visitor numbers have decreased in recent years and no strategic planning process has emerged to combat this trend or to plan for the future. Tourism grew and exploded in our community after 1990 when Custer's Last Stand re-enactment was reinstated. Then franchises sprang up in proximity to I-90 and its corridor of tourists, seeking to capture those traveling between Sheridan, WY and Billings, MT. There are too many franchises in Hardin now, and many mom and pop stores have gone out of business as a result. While the economy looks good for four to five months of the year, some long-term planning needs to take place to decide how to "market" this community during the fall and winter months.

- +/- I think of tourism as a necessary nuisance we have to put up with. Montana needs the tourist dollar, but we also have to put up with the disrespect tourists have for Montana's people and environment. I especially dislike the attitude of the tourists in regard to the basic rule on highways.

- +/- I enjoy tourists. They are interesting and fun. I don't want polluting industries or any industry which will encourage population growth.

- +/- When we moved to this community, we were willing to make do with less (lower income, lower housing standard) to live in this beautiful area and historical town. Our children thrived here with good schools, low drug and crime rates. Since then, I've seen the community change. The town is now filled with art galleries, boutiques, craft stores, etc. on its way to becoming another "Jackson Hole". Cost of real estate has increased, local shopping is gone, many of our students have no pride in their community or themselves. I attribute a great deal of this change to out-of-state people moving here (who probably visited and thought this would be a great place to live, but unfortunately brought different values with them). I have nothing against tourists - I am one, once in a while. I do feel promoted tourism has much farther reaching effects than the immediate dollars it brings in to a community. It's good for some, bad for others.

- +/- We moved to this area from a major tourist area in Colorado. I've lived with the good and bad aspects of tourism. I feel the overall impact of tourism is good in that it promotes a healthy economy if properly managed, however it is not without obligations to the community. I feel that Montana should promote growth, however that promotion should be targeted to families and not to the pick-up truck full of hunters and beer who return nothing to the area they are visiting. Vacationing families will spend money and stimulate the local economy. In return, the communities need to provide safe roads to drive on and nice restaurants and lodging to bring them back. I find Montanans in general very resistant to the change necessary to stimulate growth and have little faith in the leaders ability and desire to direct a change. Montana will eventually grow - how that is handled will determine whether Montana will remain "the last best place".

- +/- Tourism must maintain a delicate balance. Too much everything deteriorates and is costly to keep up. More tourism is not better. People come to Montana because we promote it. I'm not too excited about more promotion. We are well known enough. The dollar is the motivating factor that brings out-of-staters here to provide services to tourists. I believe we are now over the line with promoting tourism. I hope ITRR has Montana's best interest in mind and not just self promotion.

- +/- The history and wonders of Montana are very evident to those of us who live here. We should showcase and pride ourselves on what we have. If we would develop and feature these assets in a way that would indicate our appreciation and awareness of what we have, large numbers of transitory viewers can also be appreciative of those same wonders and carry that message back with them. We have a wonderland for people to see and enjoy but sheer logistics will prevent most people from coming back to live in this sparsely settled and distant land. We can have the best of both worlds if we view the tourism aspect in its proper order and logically plan for it.

- +/- I have mixed feelings about tourism. It's great for the economy and it helps our business somewhat. I think our area and other communities are capable of handling increased tourism and I welcome it. But, I'm very worried about increased tourism in our parks, recreation, and wilderness areas. These areas are overcrowded now with Montana's treasures that we all want to see and enjoy, but we may be loving them to death. If tourism increases in Yellowstone and Glacier, how can they handle the road use, water, sewer, etc.? Most of what it is doing to the environment. How can we keep Montana pristine and beautiful? I want everyone to love Montana as much as I do, but I also want it to be as beautiful and special for my children as it is for me. I think we need to promote our museum and cultural centers at least as much as the fishing and recreation; they are outstanding.

- +/- Tourism income is a two edged sword here. On the positive side the retailers love it and service stations collect lots of revenue. On the downside it means a proliferation of service-industry jobs when what this community desperately needs are jobs with annual incomes that a family can not only survive on, but thrive on. Tourism is good in the sense that America needs to see what a natural jewel Montana is - history runs in the air here, but for an overall benefit to the community I think the

retailers are the only ones reaping the pennies.

- +/- I think tourism can be a clean “industry” and can benefit the state provided there are rules (not pollute air in West Yellowstone or Yellowstone Park). There has to be some spacing so you don’t have large groups of people/horses/cars/ tourist place to pieces and destroy what people came to enjoy (sic). That means planning, protection of environment. For example - I am sure we will have to regulate entrance into the Glacier and Yellowstone Parks soon, if we want people to enjoy the experience. We have to keep certain areas wild - no roads - no oil/gas exploration and preserve our natural assets which in the long run will be invaluable for a viable tourist industry.
- +/- I think it’s hard to answer some questions as yes or no or maybe. The influx of people into Montana are a lot of undesirables (criminals). I’ve noticed an awful lot of out-of-staters who will not follow rules or speed limits. They are bad about litter and in general a lot of them are rude and demanding. There are too many pros and cons.
- +/- More understanding of what tourism means to and can do for an area. Need to properly manage tourism - too much can be detrimental, but I can’t see that in very many areas.

Negative Comments

- Highway construction has severely limited tourists coming through Libby this summer and previously went the Troy-Libby road was done (2 years).
- Have you ever seen a hamster on its treadmill? It runs and runs but gets nowhere. I live outside of Whitefish. Whitefish is the hamster and tourism is the treadmill. Tourism does not bring economic prosperity or stability to a town’s people or the community as a whole. A few people profit greatly. Most grow poor at low paying service jobs, using taxes, increased cost of living, declining community services, and decreased quality of environment. Construction jobs are temporary, they are part of the treadmill. Increased “tourist centered” businesses fuel the need for more tourists. More tourists cost more in roads, police, etc. Computer models show that the only growth that truly profits the local people and government is slow growth with clean, light industry.
- I feel that tourism brings high traffic to area. Also prices at the local businesses are too high for the blue collar worker. Some businesses jack up the prices to meet with off-season lows. That in turn makes it impossible for lower income people to enjoy some of our local attractions.
- The main “industry” of this area appears to be retirement homes. There are few other industries other than log homes. We have a two-lane road with four-lane traffic from commuters. Tourists cause congestion to add to the confusion. This is a big concern but more importantly the tourists who decide to stay are changing the rural area to a large suburban area.
- Tourism that results in part-time residents (summer snow birds) drive housing and cost of living costs up. Services and goods needed for this seasonal influx creates a boom/bust seasonal cycle. Rather than attracting tourists, why not look at what it takes to attract clean, quality businesses to our state. Let’s raise the quality of working here instead of the cost of living here. You may use my name.
- The government spending our tax money to attract tourists seems ridiculous. Use tax dollars to repair roads and rest areas and with a decent tax rate the residents won’t be leaving the state in droves. Montana is beautiful, backward, boring, and expensive place to live.

- I believe this questionnaire is a waste of time and money. Tourism is being promoted enough. We need the extra money to promote jobs to help people here and I mean year round jobs.
- I spend a lot of time traveling in my business and observe a disproportionate number of out-of-state vehicles driving at high rates of speed, but even more of a concern are the passing on solid lines and hills and generally bad driving. Tourism impacts me personally very negatively because of the increased fuel prices and motel room rates during the tourist season. My business overhead is dramatically increased by tourism and I personally receive no benefits.
- People don't give a damn, they are just looking to destroy our state!! (I think)
- It is questionable whether tourism is a benefit to the state. Do the costs incurred exceed the income in tax revenue? Do revenues really make up for the decrease in quality of life? I think not. Even if revenue exceeds costs, I doubt that it is enough to justify the deterioration of the environment. We don't need more people, we need more, better jobs.
- It truly is a trade off - more people, more services needed, more jobs, more money for communities, but then communities need more road improvements, etc. So do we really benefit? As a rancher more pressure from fishermen/tourists is a definite negative. As an outfitter certainly we need fishermen, hunters, tourists - given the choice less tourists to maintain own lifestyle with the ranch would be worth it. We would rather ranch and not have lots of tourists. More people, more pressure on fragile resources.
- Tourism doesn't create wealth, it only redistributes it. Manufacturing creates wealth. The state should spend more money towards developing a diversified manufacturing base. Tourism is great when it's there, but people are fickle, tourism isn't something that you can count on year after year.
- I hate to see Montana as a place where rich people buy up the land and try to stop economic development. I don't want the state to be a two tiered society with the rich catered to by self-employed servants and their minimum wage employees. Montana has one of the lowest per-capita incomes in the nation. Tourism, like gambling, produces nothing and supports mostly low wage jobs. The solution lies in changing our national economic policies away from speculation, and free trade and toward infrastructure development and scientific and technological progress.
- I am an unemployed mining geologist. Tourism does not promote mining. Tourism can increase restrictions on types of land use, this reduction in freedom is negative.
- Too many rich tourists coming and buying up all the property for high prices, that normal Montanans can't afford. Taxes are going too high.
- I know several people that moved up here after they toured Montana but Montana doesn't have the economy to support rich retirees and keep their own people up to par.
- I am of the opinion that tourism is way over rated. The so-called jobs that it brings in are only minimum wage jobs and for the luckier ones, seasonal employment. You can't plan to work in Montana and try to purchase a house, the wages do not allow that. The cities cannot afford to put on enough law enforcement to help patrol or just protect the people from the influx of tourists. I would just soon see all the efforts be put towards an industry i.e. timber, mining, agriculture, that could support families. Too much money is spent on promoting an industry (tourism) that only really benefits a small minority of businesses. It makes it hard to even stay in the state of Montana and to live comfortably.

- Too many, too fast. They are driving up housing costs and farmlands.
- We feel tourism ultimately causes unwanted and uncontrollable changes in all facets of local lifestyles. It results in unwanted changes, introducing undesirable lifestyles and individuals to communities not prepared for those changes. Tourism accelerates the changes that may occur at a much slower pace and perhaps tolerated at the slower rate of change. Montana has invested a great deal in tourism promotion, which has resulted in a dramatic change in the way Montanans live. In my opinion, and the opinions of people I know, those changes have caused a negative change in the lifestyles of our people. Crime is up, traffic and aggressive drivers has increased dramatically. The cost of everything is skyrocketing, land ownership is increasingly going to out-of-state owners as vacation or second home sites, etc. It's a sad day for the state and we all know it.
- This is a nice quiet community, no tourist attractions and we don't want our quality of life to change. Our state is filling up with people wanting our lifestyle and the minute they get here they want to change it. The subdivisions are ruining the last frontier. This used to be a very pretty state, now it's just a lot of houses. Most of the tourism in Montana only benefits people who live in other states. No benefit to the natives.

Neutral/Unrelated Comments

- 0 An old style gold mine. Skip the cyanide leach. We need to stomp on our law and order infrastructure. It's getting awfully piggy out. Abolish capital punishment. Legalize homegrown. Dance naked around a tree. Push birth control.
- 0 Promote Shakespeare in the park. Development of set system (buses similar to Yosemite or other transportation) for those visiting Yellowstone. It should be every so often, and do the major loops (which it is ideally set up to do). For those camping or with other gear, a system to transport to campsite. A trailhead could be useful.
- 0 It seems incredible to a comparative new comer that a state with Montana's resources - which has produced people like Jeanette Rankin, Lee Metcalf, and Mike Mansfield - should allow itself to fall into the hands of a rabble of bucolic demagogues who, feeding at the Federal trough, shout "poverty" and try to dismantle higher education, raid the public patrimony, and neglect the infrastructure and essential services, all in the name of "lower taxes". Some sweeping reforms appear to be in order.
- 0 You can't do anything about it because you really don't have a voice in Federal policy making. But if we stopped spending money to try and keep world peace (a futile effort) we wouldn't have poverty at home.
- 0 The most significant issue in Montana is the cost of living increases associated with rises in housing costs. Montanan's salaries have not kept pace with the housing costs or cost of living. The influx of out-of-state home buyers appears to have effected these two aspects of Montana living. I'm not sure how tourism influences someone's decision to move to Montana.
- 0 Not appropriate: State prison, expanded gambling.
- 0 No rock concerts. Love Montana - born and raised here - Like the country to remain free and original. Be able to fish and have some space. Need a speed law I believe.
- 0 More cafes, clothing store, any kind of business, motel or a nice hotel to go with our golf courses.

- 0 As a native Montanan that has had the pleasure of working statewide for varying amounts of time, I've seen a lot of change in some parts of the state. Thank God I still know some secret spots where no one goes. Unfortunately there seems to be nothing that can be done about the humans' innate ability to glom onto another and live life around the almighty dollar. Until the human mind can grasp the concept of self control, we're screwed.
- 0 Would like to see a sales tax in Montana so that tourists would also be paying for the infrastructure and services they use in this state.
- 0 Will you people stop wasting my tax dollars on this nonsense! Who the hell pays for all this trash and what a stupid questionnaire anyways! Get a real job!
- 0 Affordable housing is needed in our community.
- 0 Need a theme or water park which will benefit both the community and tourism. It will help keep our teens busy and out of trouble.
- 0 The bed tax is not needed. Tourists will come without such heavy promotion and "overselling". Policy focus should be on high quality, low impact, high priced tourism (high priced to the tourists). There are too many motorhomes and RVs on the roads, also vehicles hauling trailers and spare cars, for road safety. Tourist attractions encouraging this kind of travel should be discouraged. Facilities and amenities for monster vehicles and trailers should be very high priced to cut down such types of visits. Aggressive recruitment of out-of-state students by our universities and colleges is poor policy. Higher levels of state funding for these schools would help alleviate the need for getting more tuition money from such students. Residency rules need toughening too.
- 0 State and community should employ sales tax so all could gain benefits from tourism - not just business.
- 0 Cost of living is very expensive here. Also real estate property - taxes.
- 0 The COL is high here compared to average income. Sales tax in other states gets the tourist to pay part of the benefit of using our states and relieves the tax burden of the residents. The cost of maintaining our state's attractions and highways is obviously too much for the few people in our state so we need to rethink our tax system.
- 0 Please no more casinos or gambling joints. I am surprised that you don't include categories for eco-tourism, historical tourism, etc. Need to break down tourism into what types. This is a good beginning.
- 0 This is the mayor's town. He does what he wants, we pay. Senior retirement homes (like Conrad). Our house, bought in 1959 for \$10,000 is now valued at \$55,000 for tax purposes. \$825 a year when you can least afford it. We have been retired since 1981-1982. I was fired when the telephone office moved to Billings at 58 before age discrimination came in as an issue. 17 years - Husband worked 30 years for B.N. Tourism has not played a very big part in our lives. We had to pay taxes, etc. to put in a motel - water, sewer, power, etc. - if they wanted it to be built here - Why? It just made other motels have less business. There isn't any industry here that helps employment - Pamida moved in and Ben Franklin and Pennys went out. Is this progress? The money doesn't stay here. Tourists don't have to come downtown at all. The big motel is about the first thing you see after Pamida.
- 0 Develop the Ulm/Pishkan.

- 0 The people who come and build summer homes drive prices up, it makes it difficult for the people who live and work in the surrounding areas.
- 0 I think we should have an amusement park, not just for tourists, but kids need something to do. We also would have more tourists if we built a better mall in Billings. Personally, I think Billings is really boring and I can't wait to get out of Montana. It's beautiful and everything, but there's nothing for young people to do that doesn't cost a lot of money. The Montana zoo needs a little bit of work, too. I apologize for filling this out instead of my mom, but teenagers' opinions count too. After all, in a few years, we'll be the ones in charge. I hope I haven't offended anyone and I'm sorry if I have.
- 0 I feel strongly that the cultural and historic resources are not getting the support they deserve from all the bed tax money collected. If we are going to have all those people pressuring our resources, then these resources should be receiving as much; much larger portion of the tax dollars than the mere pittance available. Why not have the museum associations, a professional organization, oversee the granting of the little bricks and mortar dollars you have available for grants? As it is, there is little professional input.
- 0 A lot of tourists are superior acting and extremely rude. Montanans are trusting, helpful, and congenial. We should be treated the same - not as low class, ignorant peasants. I'm not sure why we are seen this way. Most of us are close to Montana for the very things that others see as suspicious.
- 0 Sales tax and other taxes to help state maintain roads, parks, etc.
- 0 My town will be receiving a sewer system soon. Hopefully this will attract some new industries to help support the way of life we now enjoy.
- 0 The cost of parks and other recreational facilities should be more affordable to all tax payers, not just the upper class.
- 0 Promote more on state parks, city parks, campgrounds, lakes, museums, and cultural facilities. More development needs to be done with state and city parks.
- 0 I'm from Butte whose summer economy is largely dependent on tourism, but some of those things promoted are ecological disasters. This I would like to see changed. Instead, the focus should be on the rich cultural past, less on mine waste.
- 0 Let us not as a community emphasize only "one thing", tourism, retail, etc. Personally, I think there is too much emphasis on retail instead of manufacturing - downline. By this I mean the following: paper-mill, box plant, art graphics, Target, Kmart, arts and crafts, plastic manufacturing, art graphics, Ben Franklin, auto parts manufacturing, alternator air pollution parts, mining, electronics, computer chips, computer manufacturing for computer parts, TVs, art graphics. In summation, tie manufacturing to sales and retail and tourism. People coming to see Montana sights as well as business seminars. Everything is tied together, not separately!
- 0 It is not the development but rather how it's handled. Too many people with personal interest in fattening their own pocket books are the ones that seem to have the major say so in what developments are to be let in. This makes for a serious conflict in interest for what is not good for the state of Montana. Though I have lived in Montana for only two years, I have seen and done more in understanding about Montana's growth than many that have been here much longer.
- 0 Small businesses, ??? free businesses.

- 0 I'm not in position to answer the above. I am now 90, seldom go any place, am living on social security and pension, and only know what I hear from papers and conversations with friends. I feel new-comers should be refrained from populating phoney attractions to induce tourist trade - such as that ridiculous artificial water fall in Columbia Falls. There is so much natural beauty here. More time and effort should be spent in supporting schools and more appreciation shown to the valiant and inspired teachers who carry on in spite of public distrust and prejudiced condemnation. As far as I can see, tourism pays ??? and fast ??? places very well. I'm glad I grew up in the Flathead. I'm glad I attended the university in Missoula (class of 29) and I'm glad I could come home again to Montana in 1971 and to Columbia Falls in 1980. When I was teaching in Portland, if any question was raised in the teacher's lunch room, somebody was sure to look at me and say "Oh - we know, it's better in Montana".
- 0 Survey question #2B Conditions of roads is a joke. Some of the best roads in the state are in rural areas such as I live in. These roads are all gated off for wildlife. What a joke. The animals were doing fine for hundreds of years with these roads. Now suddenly the roads are hampering their welfare. I don't think so. In fact, anymore there seems to be more animals in and around small towns than ever. If these roads were so bad for the animals, why are there more in the urban areas where there are a lot of roads?
- 0 Too many out-of-state hunters. Too many people move in then try to shut down industry i.e. mining and logging.
- 0 Keep doing an excellent job.
- 0 Mr. Kitzenburg is working very hard at getting an interpretive center at Fort Peck, which I am all for. However, I do not want to see eastern Montana become a haven for rich movie stars, or other wealthy individuals such as has happened in the western part of our state. We need growth to survive but we need to go about it carefully so that people that have lived and worked here all their lives are not forced out by exorbitant land prices and taxes.
- 0 I don't believe there is enough tourism in eastern Montana to amount to too much.
- 0 We need a museum.
- 0 Visit Jackson Hole, WY sometime. No quality, everything false, expensive, shallow...
- 0 Cleanup of our beautiful Clark Fork River valley and water.
- 0 When tourists come then decide to move here, I think we should have better zoning. I also do not think that developers should put the burden of improved infrastructure on the local citizens. Developers should pay those costs because they're the ones who benefit.
- 0 Housing and summer homes that make the tax structure increase while folks in agriculture can't handle the increase because of agricultural prices not competing effectively.
- 0 Need a sales tax so tourists help pay their way instead of all costs on only property owners.
- 0 Tell them meatheads advertising our state they can close their doors, if they have not noticed, WE'VE BEEN DISCOVERED!!!
- 0 Would like to see events brought in that it is good for Montana children and parents that doesn't cost so

much. I think as a tourist they should pay to vacation in lew keep in check (sic). But for all residents of Montana, I don't think it is right. This is our state. We pay in taxes but we're not allowed to fish or go anywhere in Montana without paying to park or camp. Should the residents of Great Falls pay to go to Grant Springs? Thank you.

- 0 Life does not exist east of Billings. Eastern Montana has lots to offer. We need jobs and shopping out here. Glendive is a great place to raise a family. School facilities are good. But the town is dying. Businesses can't make a go of it. The crime is low. There aren't very many job opportunities. The utilities and oil companies are moving out of Glendive and out of state.
- 0 I don't appreciate outsiders trying to influence how we handle our problems by threatening boycotts.
- 0 Local fishing areas. RV access
- 0 The single most important thing that could be done in my community (Billings) to improve the quality of my life is plow the roads. I don't know anywhere else in the country where they could get away with this. It couldn't possible hurt tourism either.
- 0 When we try to promote our state too much we get people to come visit then decide to stay and I hate to see so many outsiders move into our state. The people that have always been here can't afford to stay after awhile.
- 0 Let everyone know that we have no sales tax and put back the speed limit to about 75. The rest I don't care about.
- 0 Some questions are very difficult to answer. We need to eliminate gambling totally in Montana - Gambling will in the next 10 years be the costliest mistake Montana ever made, second only to tobacco. Legislators have to listen to all the voters, not the lobbyists and special interest groups. Tobacco use should be outlawed in all public places.
- 0 Educate Montanans of the problems and give them solutions.
- 0 Closer and more access to public lands - improved roads.
- 0 I do not like eastern states telling Montana to have wolves, bears, coyotes to make it impossible to be law abiding - put wolves in new ????, they would help keep the streets cleaner. We worked hard to save the land on the farm. Our biggest problem was the Government telling us and making us do it their way which didn't work in our short rain fall. I have a real problem with your gun control. When you live on a county line and have a rabid skunk in your yard, you have no choice but take of your own problems. As the sheriff is 58 miles away in one county and 46 miles in the other county and the skunk doesn't care which county he lives in (the sheriff does). I am in favor of killing our own skunks and burying them which we have done several times.
- 0 Park personnel only want to control the land that can be seen from the park. They no longer respect private ownership. The whole government is trying to control us from cradle to grave. The problem with tourists is they see beautiful Montana and our good schools and government to the exact thing they just ran away from. They do not want to take on the personal responsibility that comes with a free society.
- 0 Do not build a prison or halfway houses here. Do allow support for walleye fishing in Canyon Ferry. This would really benefit the economy and draw tourists in a positive way. Do build better motorboat

ramps, docks, restrooms.

- 0 Would like to see tourism be promoted exclusively by the private sector.
- 0 Go Bobcats!! Pooooor Grizzlies!!
- 0 If the 3 percent bed tax does not all go to the general fund, it should.
- 0 Substantial bias in questions, particularly the first ones.
- 0 We need the self-discipline of a good community and state planning by a broad based group not dominated by one interest group.
- 0 Since we are off the main roads, we don't see too many tourists. Since this is a good hunting place, we see quite a few out-of-state hunters every fall. The lack of job opportunities limits the number of people that might want to move here. Thank you for giving us a chance to reply to your survey.
- 0 I wish people would stop moving to the country from the city. They move here but live like the city. Paved roads, more high priced homes. Hunters galore, UGH it's the pits!! They are raising our taxes. They want the cement plant to close the mines for clean purposes. I am sick of it. People are wanting to buy a piece of the country, there won't be any left pretty soon. Good survey, thanks.

Summary and Conclusions

Montana residents have mixed emotions about the tourism industry in the state. It is clear that some people are adamant toward no more tourism while others see a value in tourism as an economic potential to the state. When residents look at the "whole picture" of tourism they generally believe that it is somewhat positive. However, residents do view tourism as a negative influence on the state's natural resources and highways and roads. When it was brought down to the individual level, most residents do not see how tourism helps them personally. They believe that tourism is a bad influence on their community's infrastructure, crime, cost of living, and road conditions as well as a negative influence on housing costs and their leisure time and activities.

While it is human nature to focus on the negative comments and concerns people have, it is apparent that tourism is perceived to be positive in many venues. In terms of the state's economy, parks and recreation, and cultural/historic preservation, residents saw tourism as a mechanism to help these areas. It was viewed as a positive influence in terms of the job opportunities, the education system, and emergency services. Residents also agreed with the statement that tourism promotion is necessary for the industry to compete with other states.

As is probably true for most industries, there are extremes at both ends of the perception monitor with many people in the middle. This is perhaps most evident by the number of comments in the positive/negative section and the neutral section. Residents see tourism in both the positive and negative light. They understand the need, but they also wish certain aspects of tourism would either go away or change. This is where the tourism industry can make positive in-roads.

Two major areas of concern seen as a problem caused in-part by tourism should be addressed by *state* decision-makers. First of all, residents perceive tourism to be a negative influence on the natural environment. Since these are simply perceptions, not bounded by scientific research, it is recommended

that research on the direct impact of tourism to natural areas be studied. This could be initiated first, by implementing a resident survey asking residents who feel the natural resources are negatively impacted, to be more specific on where the impacts occur and what the impact is to the land. At that point, researchers could conduct a study to monitor those perceived impacts.

Second, residents perceive that the condition of Montana's highways and roads are negatively impacted by tourism. This could refer to both the traffic congestion and road condition, but it is not clear at this point. While, again, these are just perceptions, there is this prevailing attitude pointing to a problem with tourism. The solution to this problem is a bit cumbersome. It may be a lack of knowledge as to how much visitors pay in gas tax that contributes to the maintenance of the roads or it could be a perception that the number of out-of-state license plates ahead of the resident at the local stoplight is unacceptable. It is recommended that a number of focus groups are conducted to highlight what the major concerns with highways and roads really are to the residents. Focus groups could provide in-depth discussion that could ultimately lead to further research or an educational tool about tourism and highways.

Tourism's influence on the community and the individual is perceived as negative in a number of areas. Community leaders need to be aware of these concerns when making policy decision. First of all, residents believe that tourism has a negative influence on their community's infrastructure (water, sewer, etc.) and their safety from crime. In addition, like the paragraph above, residents also believe that tourism has a negative influence on their local roads. All of these issues need further discussion by residents. It is possible that some communities feel this way while other communities do not. Individual community assessments should be compiled to determine the degree of concern and be addressed by the local decision-makers.

Another area of concern is the influence that tourism has on cost of living and present housing conditions. These generally appear to be localized issues but, never-the-less, these are common perceptions. The question that needs to be answered here is whether cost of living and housing issues would change for the better if tourism were not a contributor. It appears that whenever there is a desirable place to live (be it in Montana or Colorado), people will pay more to live in those places. Does tourism cause this? A study of both old-timers and new-comers to the state could shed some light on this issue.

Finally, many residents believe that tourism has a negative influence on their leisure time and activities. This perception needs to have further discussion to understand exactly what people mean by this statement. It could be that visitors are using the same fishing hole that previously was considered an "unknown" area and therefore it is unacceptable that it is now being "invaded". It could mean that camping spaces are filling up too fast by "nonresidents." It could mean that residents have to work harder and more to earn enough to live here which brings it back around to cost of living increases due to tourism. The point is, we really don't know why residents believe that tourism is bad for their personal leisure. It is suggested, like above, that focus groups be conducted around the state to delve further into this issue. The focus groups could provide an explanation as to why tourism causes this feeling as well as some suggestions on how to solve the concern.

In summary, tourism is perceived as both good and bad. Until further research can be conducted to learn the causes of these negative perceptions, state and local policy makers should step lightly in these areas. The positives of tourism should continue to be highlighted while the in-depth research is underway.