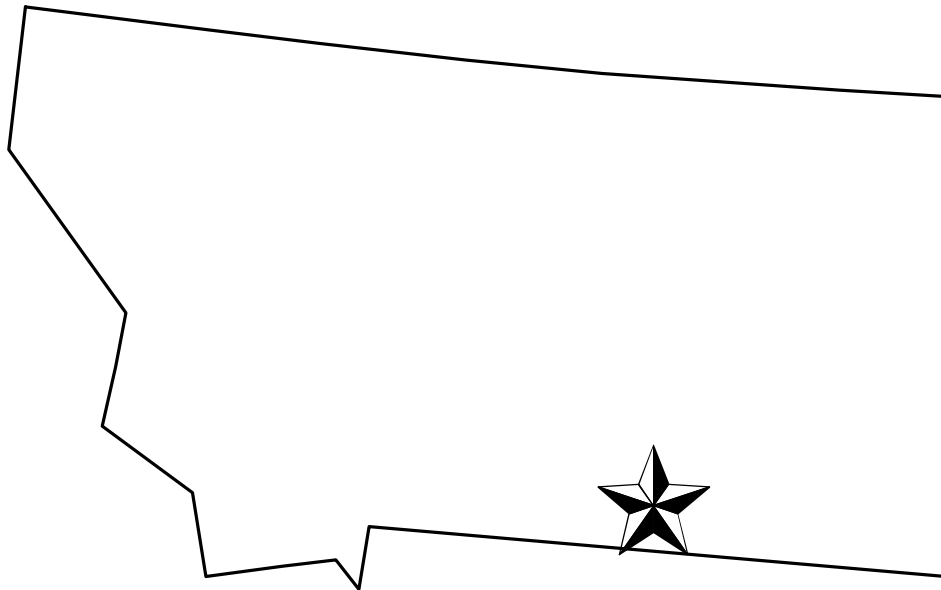


# Residents Speak Out About Tourism Potential of Big Horn County

Big Horn County, MT

The 1998 Montana Community  
Tourism Assessment Process



Research Report 62  
January 1999

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## The 1998 Montana Community Tourism Assessment Process

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## **EXECUTIVE SUMMARY**

### **Introduction**

This report presents information about tourism for Big Horn County, Montana, including present levels and characteristics of travel, residents' opinions and attitudes about tourism in Montana and in their county along with characteristics for a statewide sample. A mail-back questionnaire was administered to a randomly selected sample of 500 residents of Big Horn County and to a statewide sample of 1000 Montana residents during October and November, 1998. That initial mailing was followed one week later by a reminder postcard and two weeks after that by a replacement questionnaire to those residents who had not yet responded.

### **Results**

#### **NONRESIDENT VISITORS:**

- In 1998, 3.8 million nonresident travel groups visited Montana. Of those, over 700,000 (18%) traveled through Big Horn County.
- Ten percent of nonresident visitor groups that traveled through Big Horn County spent at least one night in the county.
- The typical visitor to Big Horn County was a couple, between the ages of 30 and 64 traveling without children. However, family groups made up 27% of nonresident visitors to Big Horn County.
- Visitors to Big Horn County were more likely to stay in a campground than a motel while traveling in Montana.
- Visitors to Big Horn County were more likely than other nonresident visitors to be in Montana primarily for vacation/recreation/pleasure.
- Nonresident visitors to Big Horn County were attracted to Montana primarily for the mountains, Yellowstone National Park, Glacier National Park, and fishing.

- Nonresident visitors to Big Horn County were more likely to participate in visiting historic and interpretive sites, museums, and Native American sites than other nonresident visitors to Montana. However, they were less likely to participate in watching wildlife, nature photography, shopping, day hiking and picnicking than were other nonresident visitors to Montana.
- Nonresident visitors to Big Horn County spent the equivalent of \$1,308 per resident of Big Horn County.
- Nonresident travel groups to Big Horn County spent an average of \$83.00 per day while traveling in Montana for an average of 5 days (4 nights) per group.

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

- Big Horn County residents rate agriculture/agribusiness as the best opportunity for future economic development in Big Horn County, followed by tourism.
- Thirteen percent of Big Horn County respondents feel that their job is very dependent on tourism. This is three times the proportion in the statewide sample.
- Over half (51%) of Big Horn County respondents have regular or somewhat frequent contact with visitors, and three quarters (75%) make an effort to make visitors feel welcome.
- Residents from Big Horn County feel less attached to their community than the statewide sample, and are much less optimistic about the future of their community than the statewide sample.
- Half (50%) of Big Horn County residents feel the county is either not growing or that it is decreasing.
- Big Horn County residents indicate that parks & recreation, museums, and cultural experiences contribute to community life, but that improvement is needed for cost of living, condition of roads, safety from crime, and emergency services.
- Tourism is seen as having a negative impact on safety, infrastructure, and traffic congestion.
- Big Horn County residents are generally positive toward tourism development, but do not feel that increased tourism will benefit them personally.
- Big Horn County residents do not feel that the county is becoming overcrowded with tourists, that too many people are moving into the state, or that their opportunities for recreation are limited by visitors.
- County residents feel that there is adequate undeveloped open space, but are concerned about it's potential disappearance.
- Big Horn County residents feel strongly that residents should be involved in any decisions about tourism development in the county.
- Residents see the top advantage of increased tourism as more money, and the top disadvantage as wear & tear on roads and increased traffic & congestion.

#### **BIG HORN COUNTY QUESTIONS:**

Big Horn County residents make frequent use of the events and attractions available in the county and would recommend most area attractions and events to visitors.

According to the respondents, the best opportunity for increased tourism development in Big Horn County are those events and attractions associated with the battle of Little Bighorn.

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## **INTRODUCTION**

This report is intended to provide a comprehensive profile of current visitors and resident attitudes about tourism in Big Horn County as part of the 1998 Montana Community Tourism Assessment Process (CTAP). The Community Tourism Assessment Process is done in cooperation with Travel Montana and the Montana State University Extension Service with assistance from the Institute for Tourism and Recreation Research at The University of Montana. Each year, three communities are chosen to participate in the CTAP program from the eligible pool of applicants. The 1998 communities included Beaverhead County, Big Horn County, and Anaconda/Deer Lodge County. Other Montana communities which have made use of the CTAP process include Choteau, Libby, Lewistown, Glendive, Fort Belknap Indian Community, Ravalli County, Three Forks, Glacier County, Deer Lodge, Hill County, Laurel, Livingston, and Powder River County. The initial assessment process takes approximately nine months to complete.

At the conclusion of the assessment process, members of the CTAP committee decide whether further tourism development would be beneficial to the community and, if so, suitable projects are identified and pursued. The decisions about how to proceed are based on consideration of a wide variety of information including present levels and characteristics of travel, existing travel-related infrastructure and attractions, the area's need for economic development, and residents' opinions about tourism. The resident tourism committees are encouraged to continue beyond that time with work that was started using the CTAP.

The Institute for Tourism and Recreation Research at The University of Montana (ITRR) supports CTAP by providing technical assistance to the communities through this visitor and resident profile report. Funding for this research came from the Lodging Facility Use Tax.

To ease understanding, the reader needs to be aware that two separate studies were used in the preparation of this report. First, current nonresident visitor profiles for Big Horn County and the State of Montana were developed using research conducted by ITRR during the summer of 1996. At that time, a four-month survey was conducted of nonresident summer travelers to Montana. To represent Big Horn County visitors, a profile of visitors was developed from the subset of surveys that represented nonresident travelers passing through the County. Both statewide and Big Horn County visitor profiles are provided for comparison purposes. Second, an assessment of resident opinions toward tourism was developed based on mail-back questionnaires obtained from households in Big Horn County during October and November 1998. Resident opinions were also obtained from a statewide sample of Montana households during this time. Results from both samples are reported to provide a comparison between resident opinions toward tourism in Big Horn County and Montana.

This report is presented in two sections. The first section provides the visitor profile for Big Horn County and Montana. The second section provides an assessment of residents' attitudes toward tourism in Big Horn County.



## SECTION I

Data collected for this section of the report came from ITRR's 1996 Nonresident Summer Travel Study. A full copy of this study can be downloaded from the ITRR Web Site at [www.forestry.umt.edu/itr](http://www.forestry.umt.edu/itr).

### THE NONRESIDENT TRAVEL STUDY METHODOLOGY

Travelers to Montana during the summer of 1996 (June 1 – September 30) were intercepted for the Nonresident Travel Study. The traveler population was defined as those persons who entered Montana by private vehicle or commercial air carrier during the study period and whose primary residence was not in Montana at that time. Specifically excluded from the study were those persons traveling in a plainly marked commercial vehicle such as a scheduled or charter bus or semi truck. Also excluded were those travelers who entered Montana by train. Other than the exclusions mentioned above, the study attempted to assess all types of travel to the state including travel for pleasure, business, passing through the state or any other reason.

Data were obtained through a mail-back diary questionnaire that was administered to a sample of intercepted travelers in the state. During the four-month study period, 12,941 groups were contacted. Usable questionnaires were returned by 5,800, groups for a response rate of 45 percent. (For a complete discussion of the methodology and results of the 1996 Nonresident Summer Travelers to Montana Study, please refer to ITRR Research Reports 51<sup>1</sup> and 52<sup>2</sup>.) To apply this data to specific communities, nonresident visitors were identified based on the highway travel segments they had indicated on the questionnaire map. A group of 1,095 respondents were identified as having traveled through Big Horn County. Of that number 139 were identified as having spent at least one night in Big Horn County. The statewide sample included all travelers. Because this study represented nonresident travel, none of the data included Montana residents visiting the area. Table 1 shows the nonresident travel sample sizes.

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<sup>1</sup> Parrish, J., N. Nickerson, and K. McMahon, (1997). **Nonresident Summer Travelers to Montana: Profiles and Characteristics. Research Report 51, Institute for Tourism and Recreation Research, School of Forestry, The University of Montana, Missoula, MT 113 pp.**

<sup>2</sup> Parrish, J., N. Nickerson, and K. McMahon, (1997). **Nonresident Summer Travelers to Montana: All Visitors, Cultural Visitors, Canadian Visitors, Highway and Air Traveler Characteristics. Research Report 52, Institute for Tourism and Recreation Research, School of Forestry, The University of Montana, Missoula, MT 106 pp.**

**Table 1: Sizes and Response Rates for the Summer Survey Samples Used in this Report**

	Statewide	Big Horn County
Nonresident groups contacted:	12,941	
Usable nonresident travel questionnaires returned:	5,800	
Nonresident Travel Study response rate:	45%	
Sample size of nonresident travel groups:		1,095
Percent of all nonresident travel groups:		19%

Source: ITRR

### **FINDINGS: A PROFILE OF CURRENT VISITORS**

According to the ITRR visitor estimation model, there were 3,803,000 visitor groups (averaging 2.6 people per group) to Montana during 1998<sup>3</sup>. For the entire year, it was estimated that over 700,000 (18%) of those groups passed through Big Horn County. Of those visitor groups that traveled through Big Horn County, 10 percent (about 70,000) were captured for at least one night. These travel group characteristics were obtained from and represent visitor groups who spent at least one night in Big Horn County.

While ITRR nonresident travel data was collected in 1996, visitor characteristics do not change much in a five-year time period. Therefore, those visitor characteristics to Big Horn County can be used for numerous years unless new attractions are developed in the area that would draw substantially more visitors or particular types of visitors.

#### **Group Characteristics**

Table 2 shows travel group characteristics. There were some differences between the travel groups staying overnight in Big Horn County and the entire statewide sample. The following results indicate those differences:

Statewide. The average travel party size of Montana visitors was 2.6. Seventy-five percent of Montana travelers had visited the state before this trip. Most summer visitors to Montana traveled as couples (38%). Thirty-four percent of Montana visitors traveled with family. Thirty-one percent of male visitors in this sample were 30-49 years old and 24 percent were 50-64 years old. Thirty-three percent of female visitors were 30-49 years old and 25 percent were 50-64 years old. The majority of summer visitors' choice of accommodation while in Montana was motels/hotels (59%) and they stayed, on average, 3 nights.

<sup>3</sup> The total number of travelers is estimated each year, while the profile of visitors is only re-evaluated every few years. Therefore, this report represents traveler characteristics that were estimated from data collected in the summer of 1996, and applied to the estimated number of travelers and their total economic impacts for 1998.

Big Horn County. The average party size for Montana travel groups who stayed in Big Horn County was 2.4, slightly smaller than the average group size for the state. Seventy-seven percent of overnight visitors to Big Horn County had visited Montana before. Most summer overnight visitors staying in Big Horn County were traveling as couples (44%). Twenty-seven percent traveled in family groups, and 18 percent were traveling alone. One third (33%) of male travelers were 30-49 years old and 26 percent were 50-64 years old. Thirty-four percent of female travelers were 30-49 years old and 32 percent were 50-64 years old. Travelers who stayed overnight in Big Horn County were most likely to spend the night in a hotel or motel (50%), a private campground (47%), or a public campground (23%) while traveling in Montana.

**Table 2: Characteristics of Summer Nonresident Travelers Visiting Montana**

Characteristics:	Statewide	Big Horn County
<b>Group Type</b>		
Couple	38%	44%
Family	34%	27%
Alone	17%	18%
Friends	7%	6%
Family & Friends	3%	2%
Business Associates	1%	2%
Group or Club	<1%	2%
<b>Group Size</b>	<b>2.6</b>	<b>2.4</b>
<b>Males</b>		
0-17 Years Old	19%	16%
18-29 Years Old	10%	5%
30-49 Years Old	31%	33%
50-64 Years Old	24%	26%
65+ Years Old	16%	20%
<b>Females</b>		
0-17 Years Old	18%	13%
18-29 Years Old	10%	6%
30-49 Years Old	33%	34%
50-64 Years Old	25%	32%
65+ Years Old	14%	16%
<b>Have visited MT before</b>	<b>75%</b>	<b>77%</b>
<b>Total nights spent in MT</b>	<b>3</b>	<b>4</b>
<b>Overnight Accommodations used while in Montana</b>		
Home of friend, relative %	21	17
Hotel, motel %	59	50
Private campground %	18	47
Public campground %	16	23
Undeveloped camp %	4	5
Resort, guest ranch %	5	4
Condominium %	1	2
Other %	5	6

**Travelers to Big Horn County are most likely to be made up of couples over 50 years of age traveling together, followed by family groups.**

**APPLICATION: Senior adult couples have more discretionary money and are more flexible in travel plans. Families are usually looking for opportunities that will be appealing to children.**

**A large percentage of repeat Montana visitors travel through Big Horn County.**

**Visitors to Big Horn County were more likely to stay in a campground than a motel.**

**APPLICATION: There may be opportunity for additional campground development.**

Source: ITRR

Visitors to the state, as well as to Big Horn County, differed in their state of origin. Washington State, California, and Idaho were in the top five states of residence for the state sample. Visitors to Big Horn County were most likely to be from Washington State, California, or Colorado. Table 3 shows the states that were the top five visitor origins. These visitors accounted for approximately 39 percent of all visitors to Big Horn County

and about 45 percent of visitors to Montana. Each column in Table 3 lists the states which had the highest representation of visitors to that area in descending order.

**Table 3: State of Origin of Visitors to Montana: Top Five States**

Statewide	Big Horn County
Washington	Washington
California	California
Idaho	Colorado
Wyoming	Indiana
Colorado	Florida

Source: ITRR

**Information Sources**

During the sampling process, nonresident travel parties indicated which information sources were used to gather information for their trip *prior* to arriving in Montana as well as *while* they were in Montana. Also, respondents indicated which of those information sources were most useful to them. A list of 11 information sources was included in the questionnaire.

Statewide. Forty percent of the visitors did not use any of these sources prior to their trip. The top three most frequently used information sources were AAA (31%), travel guide books (22%) and national park brochures (20%) (Table 4). The *most useful* sources of information were AAA (39%), travel Guide Books (19%), and the Montana Travel Planner (12%) (Table 5).

Visitors were also asked where they received travel information *while* in Montana. Travel information sources used most frequently were persons in motel, restaurant, gas station, campgrounds, etc. (36%), highway information signs (35%), and brochure racks (33%) (Table 6). Visitors then indicated which source was *most helpful* while traveling in Montana. Twenty-four percent of respondents stated persons in motels, restaurants, gas stations, campgrounds, etc., were most helpful, followed closely by persons in visitor information centers (22%) (Table 7).

Big Horn County. Thirty-eight percent of overnight visitors to Big Horn County did not use any of these sources of information when planning their trip. Most popular sources of information used by visitors to Big Horn County included travel guide books (22%), the Montana Travel Planner (20%), and AAA and national park brochures (19% each). The *most useful* source of information used by visitors to Big Horn County included travel Guide Books (27%), AAA (23%), and the Montana Travel Planner (21%).

While traveling, overnight visitors to Big Horn County used highway information signs (46%), brochure racks (42%), and information from persons in motels, restaurants, gas

stations, etc. (41%), most frequently for travel information. The *most useful* source of en-route information for visitors to Big Horn County included brochure racks (28%), persons in visitor information center and "other" (19% each), and persons in motels, restaurants, gasoline service stations (17%).

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

Source: (could be more than one)	Statewide %	Big Horn County %
None of the Sources	40	38
AAA	31	19
Travel Guide Book	22	22
National Park Brochures	20	19
Montana Travel Planner	13	20
1-800 State Travel Number	7	12
Chamber or Visitor Bureau	7	7
Information From Private Businesses	7	8
Internet Travel Information	5	8
State Park Brochures	4	7
Regional Travel Number	1	0
Attend a Travel Trade Show	<1	0

**Nonresident travelers to Big Horn County used a number of information sources for travel planning.**

**APPLICATION:  
Work with Travel publishers to insure coverage in most used publications.**

Source: ITRR

\* Visitors could choose more than one information source.

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

Source:	Statewide %	Big Horn County %
AAA	39	23
Travel Guide Book	19	27
Montana Travel Planner	12	21
National Park Brochures	11	5
Information From Private Businesses	6	7
Chamber or Visitor Bureau	5	3
1-800 State Travel Number	4	9
Internet Travel Information	3	1
State Park Brochures	1	2
Regional Travel Number	<1	0
Attend a Travel Trade Show	<1	0

**Businesses should seek AAA endorsement.**

**Work closely with travel writers and publishers.**

Source: ITRR \* Percent total may not equal 100% due to rounding.

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

Source: (could be more than one)	Statewide %	Big Horn County %
Person in Motel, Restaurant, Gas Station, Etc.	36	41
Highway Information Signs	35	46
Brochure Rack	33	42
Person in Visitor Information Center	26	33
None of the Sources Used	24	14
Other	18	16
Business Billboards	10	12
Computer Touch Screen Info Center	<1	0

Source: ITRR

Visitors could choose more than one information source.

**APPLICATIONS:**

**Conduct Superhost program regularly.**

**Work with Highway Dept. to assure adequate sign information.**

**Keep up-to-date, attractive, informational literature in accessible locations.**

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

Source:	Statewide %	Big Horn County %
Person in Motel, Restaurant, Gas Station, Etc.	24	17
Person in Visitor Information Center	22	19
Highway Information Signs	19	15
Other	18	19
Brochure Rack	15	28
Business Billboards	2	3
Computer Touch Screen Info Center	--	0

Source: ITRR

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

**Direct visitors to an attractive, easily accessible, (and staffed, if possible) visitor information center.**

**Keep literature racks full, organized and accessible.**

## Purposes of Summer Trip

Nonresident travel parties were asked all reasons for traveling to Montana (many visitors had more than one reason). Travelers were then asked to identify their *primary* reason (one answer per respondent) for traveling to Montana. The first column of Table 8 lists all reasons while the second column lists the primary reason.

Statewide. More than three-quarters of all sampled visitors (77%) traveled to Montana for vacation/recreation/pleasure. Other popular purposes of trip included passing through the state (31%) and visiting friends or relatives (31%).

With respect to statewide travelers' *primary* reason for visiting the state, nearly half of all sampled visitors (49%) were in Montana for vacation/recreation/pleasure. Passing through the state (21%) and visiting friends or relatives (16%) were also stated as primary reasons.

Big Horn County. Vacation/recreation/pleasure was the most frequently cited purpose for visiting Montana by visitors to Big Horn County (84%). Additional popular reasons for visiting Montana by Big Horn County visitors included just passing through (33%), and visiting family and friends (24%).

For visitors to Big Horn County, the most commonly cited *primary reason* for visiting Montana was vacation/recreation/pleasure(63%) followed by those who were just passing through the state (21%). Eight percent were visiting family and friends.

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

Travel Purpose:	Statewide %		Big Horn County %	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	77	49	84	63
Passing Through	31	21	33	21
Visit Family/Friends	31	16	24	8
Business	10	6	4	2
Recreational	9	1	7	1
Shopping				
Necessity Shopping	4	1	2	0
Other	4	3	6	2
Convention/Meeting	3	2	5	3
Medical	2	1	2	0
		100%		100%

**Nonresident visitors to Big Horn County were primarily in Montana for vacation.**

**Appeal to visitors vacation motivation to keep them longer.**

Source: ITRR

\* Visitors could choose more than one reason.

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



## Montana Attractions

Travelers indicating vacation as one trip purpose were asked what attracted them to Montana as a vacation destination. Visitors were asked to check *all* things that attracted them to Montana and then to choose what one thing *primarily* attracted them to Montana (Table 9).

Statewide. Many vacationers were attracted by more than one feature. The top five attractions to Montana were the mountains (51%), Yellowstone National Park (39%), rivers (35%), Glacier National Park (31%) and open space (31%).

Glacier National Park (25%) was the most popular *primary* attraction to Montana for statewide travelers followed by Yellowstone National Park (22%) and mountains (12%).

Big Horn County. The most frequently cited attractions for Montana visitors to Big Horn County include the mountains (52%), visiting historic sites (45%), open space (40%), rivers (39%), and uncrowded areas (37%). The *primary* attraction to Montana for visitors traveling through Big Horn County include Glacier National Park (22%), fishing (17%), Yellowstone National Park (13%), and the mountains (12%).



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

Vacation Attraction:	Statewide %		Big Horn County %	
	Types of Attractions*	Primary Attraction**	Types of Attractions*	Primary Attraction*
Mountains	51	12	52	12
Yellowstone NP.	39	22	36	13
Rivers	35	1	39	1
Glacier NP	31	25	26	22
Open Space	31	6	40	7
Wildlife	28	2	30	1
Uncrowded Areas	27	4	37	3
Lakes	26	1	21	0
Camping	19	2	30	4
Friendly People	18	3	16	0
National Forest	15	1	16	0
Hiking	15	1	15	0
Fishing	14	6	16	17
Historic Sites	13	2	45	7
Montana History	11	1	22	2
Indian Culture	10	1	19	4
Spec. Attraction	8	6	13	5
Wilderness Area	8	1	5	0
N Great Plains	6	<1	13	0
Badlands	6	1	14	1
State Park	6	<1	4	0
Special Event	4	4	7	2
		100%		100%

**Nonresident visitors to Big Horn County were more likely to be attracted by uncrowded areas, camping, historic sites, Montana history, and Indian culture than were other Montana visitors. These represent tourism assets that the county could promote.**

**Big Horn County is not a destination, however. Visitors are traveling through on their way to see the National Parks, go fishing, and see the mountains.**

Source: ITRR

\* Visitors could choose more than one type of attraction.

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

## Visitor Activities

Table 10 lists activity participation rates by nonresident travelers in Montana. Wildlife watching was the top activity in all samples.

Statewide. Wildlife watching was the most popular activity among the statewide sample (45%). Other activities in which visitors participated in, in order of popularity, were visiting family or friends (34%), nature photography (33%), recreational shopping (32%), day hiking (29%), visiting historic/interpretive sites (29%), camping in developed areas (28%), picnicking (26%), and visiting museums (21%).

Big Horn County. Over half (55%) of visitors to Big Horn County indicated that they visited historic/interpretive sites while in Montana. Other popular recreation activities for visitors to Big Horn County include camping in developed areas (47%), wildlife watching (39%), visiting museums (35%), nature photography (29%), visiting Native American sites (28%), and recreational shopping (25%).

**Table 10: Recreation Activity Participation of Visitors to Montana \***

Recreation Activity:	Statewide %	Big Horn County %
Wildlife watching	45	39
Visiting family/friends	34	18
Nature photography	33	29
Rec. Shopping	32	25
Day hiking	29	19
Hist./Interpretive Sites	29	55
Camping/Developed Area	28	47
Picnicking	26	24
Visiting museums	21	35
Fishing	15	18
Swimming in pools	14	8
Gambling	10	14
Camping in Primitive Areas	10	15
Visit Native Amer. Sites	10	28
Nature Studies	9	15
Special Events/Festivals	8	6
Swimming in natural areas	7	6
River Rafting/Floating	6	7
Golfing	5	1

**Nonresident visitors to Big Horn County were much more likely to have camped, and visited historic and Native American sites, and museums than other Montana visitors**

Source: ITRR

\*Visitors could choose more than one activity.

**Economic Characteristics**

Information about the number of visitors to an area and how much they spend is very useful for planning purposes. While travel group characteristics are based only on groups that spent a night in Big Horn County, economic information is much more inclusive. Table 11 summarizes visitation and expenditures in Montana and in Big Horn County (which is represented by any group that spent money in Big Horn County). ITRR staff estimated that 3,803,000 travel groups visited Montana in 1998. Of those 3.5 million travel groups, approximately 700,000 (18%) went through Big Horn County.

Statewide. Nonresident visitors to Montana spent in excess of \$1.5 billion dollars in the state during 1998. Nonresidents spent the equivalent of \$1,740 per person living in the state (based on 1990 census data for Montana).

Big Horn County. Nonresident spending in Big Horn County totaled \$16,500,000 in 1998, or 1.1% of all nonresident travelers spending in Montana. Nonresidents spent the equivalent of \$1,308 per person in the county (based on 1990 census data for Big Horn County).

**Table 11: Visitation and Expenditures of Nonresident Travelers to Montana**

<b>Distribution of Expenditures in Sample Area:</b>	<b>Statewide</b>	<b>Big Horn County</b>
Hotel, Lodge, Campgrounds, RV Park, B&B %	17%	10%
Auto Rental & Transportation %	4%	0%
Gasoline, Oil %	22%	21%
Restaurant, Bar %	18%	11%
Groceries, Snacks	8%	6%
Retail Sales %	24%	44%
Miscellaneous Services %	6%	7%
Total Travel Groups to Sample Area in (1998\$)	3,550,000	700,000
Total Expenditures in Sample Area in (1998\$)	\$1,519,000,000	\$16,500,000
Expenditures in Area - Per Capita (1990 US Census)	\$1,740	\$1,308

Source: ITRR





## SECTION II

Data collection for this section of the report came from the ITRR Resident Opinion Study conducted during the fall of 1998.

### **METHODOLOGY: THE MONTANA RESIDENT OPINION STUDY**

A mail-back questionnaire was administered to a randomly selected sample of 500 residents of Big Horn County and to a statewide sample of 1000 Montana residents during October, November, and December 1998. 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.

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

The reader is cautioned to bear in mind that these results represent opinions from 28 percent of those Big Horn County residents polled. It was assumed that respondents did not differ from nonrespondents in their opinions. Because the age distribution of respondents of the survey differed from the July 1, 1997, census estimates of age group categories, responses were adjusted to more closely reflect the population of Big Horn County residents. Table 12 summarizes sample sizes and response rates for the Resident Opinion Study.

**Table 12: Sizes and Response Rates for the Survey Samples used in this Report**

	<b>Statewide</b>	<b>Big Horn County</b>
Resident questionnaires sent out:	1000	500
Undeliverables:	100	27
Resident questionnaires returned:	364	131
Resident Opinion Study response rate:	40%	28%
Female/male response ratio	40:60	57:43

As a community pursues tourism as a development strategy, the goals of that effort generally include an improved economy, more jobs for local people, community stability, and ultimately, a protected or improved quality of life for the community's residents.

Understanding residents' perceptions of the conditions of their surroundings and tourism's influence on those conditions can provide guidance toward appropriate development decisions.

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

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

- 1) Respondent Characteristics
- 2) Residents' Attitudes and Opinions about Tourism
- 3) Big Horn County Specific Questions

### **Respondent Characteristics**

A number of survey questions related to respondent characteristics. These questions are asked in order to verify that the sample group is reflective of the population in general as well as to be able to make comparisons between Big Horn County respondents and respondents to the statewide survey which was conducted at the same time.

Initially, the study sample of residents did not accurately reflect the population of Big Horn County in terms of the proportion of individuals in each age group category included in the July 1, 1997, census. Therefore, respondent characteristics and responses were adjusted to more closely reflect the population of Big Horn County.

**Age and gender:** Respondents were asked to indicate their gender and age.

**Statewide.** Sixty percent of respondents to the statewide survey were male. The remaining 40 percent were female. The average age of respondents to the statewide survey was 48 years with respondents ranging in age from 23 to 89 years of age (Table 13).

**Big Horn County.** Female respondents outnumbered males 57 to 43. The average age of respondents was 47 years, ranging from 24 to 93 years (Table 13).

**Table 13: Respondents Age Characteristics**

<b>Age:</b>	<b>Statewide</b>	<b>Big Horn County</b>
Average Age	48 years	47 years
Percent Male	60%	43%
Percent Female	40%	57%
Minimum Age	23 years	24 years
Maximum Age	89 years	93 years

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

Statewide. Fifty-eight percent of statewide survey respondents were native Montanans (Table 14).

Big Horn County. Fifty-eight percent of Big Horn County respondents were native Montanans. (Table 14).

**Length of Residence:** Subjects were asked two questions related to length of residence. Subjects were asked to indicate how long they had resided in their county, as well as how long they had lived in the state of Montana.

Statewide. Respondents' average length of residence in their county was 24 years or 50 percent of their lives. On average, respondents had lived in the State of Montana for 35 years or 73% of their lives (Table 14).

Big Horn County. On average, Big Horn County respondents were 47 years of age and had lived in the county 29 years or 60 percent of their lives; and had lived in Montana 36 years or 77% of their lives (Table 14).

**Table 14: Respondents' Residency Characteristics**

<b>Residency:</b>	<b>Statewide</b>	<b>Big Horn County</b>
Born in Montana	58%	58%
Mean years lived in the county	24 years	29 years
Mean years lived in Montana	35 years	36 years
Age (Mean Years)	48 years	47 years
Percentage of life spent in county	50%	60%
Percentage of life spent in Montana	73%	77%



**Table 15: Respondents' Length of County Residency**

<b>Residency:</b>	<b>Statewide %</b>	<b>Big Horn County %</b>
10 years or less	31%	23%
11 to 20 years	21%	14%
21 to 30 years	14%	18%
31 to 40 years	17%	23%
41 to 50 years	8%	11%
51 to 60 years	3%	5%
61 and Over	6%	7%

**Employment Status:** A person's employment status, type of job, and economic work sector can all influence personal well-being and support for tourism. In general, the more dependent a person is financially on the tourism industry, the higher the support for tourism. Table 16 shows employment status of respondents.

**Statewide.** Professionals made up the largest group of respondents to the statewide survey, making up 27 percent of those responding. Retirees made up the second largest group of respondents or 22 percent. No other employment category was represented by more than seven percent of the respondents (Table 16).

**Big Horn County.** Respondents from Big Horn County were most likely to be employed as professionals (31%), followed by retirees (14%) (Table 16).



Table 16: Employment Status of Resident Respondents

<b>Employment Status:</b>	<b>Statewide %</b>	<b>Big Horn County %</b>
Unemployed	1%	1%
Retired	22%	14%
Student	2%	1%
Homemaker	2%	9%
Laborers	7%	1%
Farmer/Rancher	3%	4%
Farm/Ranch Laborer	1%	
Clerical	5%	7%
Armed Forces	<1%	
Service Worker	5%	2%
Professional	<b>27%</b>	<b>31%</b>
Educator	6%	11%
Manager/Self Employed	7%	6%
Sales	7%	6%
Craftsman	4%	5%

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

**Statewide.** Nearly half of respondents indicated that they lived in a town over 20,000 population. Respondents from rural areas made up 26 percent of all respondents (Table 17).

**Big Horn County.** Big Horn County respondents were more likely to live in a small town (42%) than out of town (58%) (Table 17).

Table 17: Respondents' Place of Residence

<b>Community Type:</b>	<b>Statewide %</b>	<b>Big Horn County %</b>
Community of 20,000 or more	45%	
Community of less than 20,000	28%	42%
Rural area	26%	58%

**Native American Respondents:**

Because the Crow Indian Reservation makes up a large portion of Big Horn County, ITRR was concerned that Native American residents be adequately represented in the sample. The county survey went to 500 randomly selected households in Big Horn County. The questionnaire included one question asking whether the respondent was a member of the Crow tribe or a member of the Northern Cheyenne tribe. This question was included in order to assess the frequency of response from the Native American community in Big Horn County. In addition, a door-to-door survey was conducted in the town of Crow Agency by students from Little Big Horn College. A sample of sixty randomly selected households were identified using a public utility map to identify living units.

The mail-back survey included 16 respondents who had identified themselves as members of the Crow or Northern Cheyenne Nation. Twelve of these respondents (75%) indicated they were members of the Crow tribe while 4 respondents (25%) indicated membership in the Northern Cheyenne tribe. No usable surveys were returned from the door-to-door survey effort. The small number of usable surveys from identified Native American respondents prevents any meaningful analysis of responses received strictly from Native Americans.

### **Tourism and the Economy**

Several survey questions related to the local economy and the role tourism has in the local economy. Residents were asked, "Compared to other industries, how important a role do you think tourism should have in your community/county's economy?" In addition, residents ranked industries on a scale of 1 (best) through 8 (worst) indicating which they believed offered the best opportunity for future economic growth for their community/county.

Statewide. The majority (56%) of respondents believed that tourism should play a role equal to other industries in the economy while a third (33%) thought tourism should play a relatively minor role in the local economy (Table 18). Tourism ranked fifth behind mining, retail & wholesale trade, agriculture/agribusiness, services, and manufacturing, as offering the best opportunity for economic development (Table 19).

Big Horn County. Fifty-eight percent of respondents from Big Horn County believe tourism should play an equal role with other industries in the county's economic development. Twenty-eight percent believe tourism should play a dominant role (Table 18). In ranking industries for their economic development potential for Big Horn County, tourism ranked second behind agriculture/agribusiness (Table 19).

**Table 18: Role of Tourism in Economic Development**

Role:	Statewide %	Big Horn County %
A minor role.	33%	14%
A role equal to other industries.	56%	58%
A dominant role	11%	28%

**Big Horn County residents are much more pro-tourism as an economic development tool than the statewide sample.**

**Table 19: Best Opportunity for Economic Development**

Industry	Statewide		Big Horn County	
	Rank	Mean*	Rank	Mean*
Retail & wholesale trade	1	2.97	5	4.05
Agriculture/Agribusiness	2	3.25	1	2.66
Services (health, business, etc)	3	3.42	4	4.05
Manufacturing	4	3.74	6	4.84
Tourism/recreation	5	3.88	2	2.96
Wood products	6	4.83	7	6.06
Mining	7	5.52	3	4.18

**According to respondents, tourism ranked second as the best opportunity for future economic development in Big Horn County.**

\* Scores represent mean responses measured on a scale from 1 (best opportunity) to 8 (worst opportunity).

**Dependence on Tourism**

Several questions were designed to determine the extent to which respondents felt they were dependent upon the tourism industry. Respondents were asked to indicate how dependent their job was on tourism.

Statewide. Three percent of respondents indicated that their job was very dependent on tourism. Seventy-five percent indicated that their job was not at all dependent on tourism (Table 20).

Big Horn County. As compared with the statewide sample, Big Horn County residents were more likely to feel they are dependent on tourism, with 39 percent indicating some level of dependence on tourism in Big Horn County compared with 25 percent of the statewide sample (Table 20).

**Table 20: Job Dependence on Tourism**

Dependence	Statewide %	Big Horn County %
Very dependent	3%	13%
Somewhat dependent	22%	26%
Not at all dependent	75%	61%

**A much greater proportion of Big Horn County residents feel they are financially dependent on tourism than indicated by the statewide sample.**

**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.

Statewide. When asked about the frequency of their day-to-day interaction with tourists, 10 percent indicated that they had regular contact, and 31 percent reported having somewhat frequent contact with tourists. An additional 43 percent indicated that they had infrequent contact with tourists (Table 21). Only seven percent of respondents made an effort to avoid tourists in their community. Nearly sixty percent made an effort to make visitors feel welcome (Table 22).

Big Horn County. Big Horn County respondents have more regular and frequent contact with tourists than the statewide sample. Fifty-one percent of respondents have regular to somewhat frequent contact with tourists (Table 21). In addition, respondents from Big Horn County seem to make a greater effort to make visitors feel welcome than the statewide sample (Table 22).

**Table 21: Interactions with Tourists**

Frequency of Interactions	Statewide %	Big Horn County %
Regular	10%	16%
Somewhat Frequent	31%	35%
Infrequent	43%	32%
Almost Never	16%	17%

**More than half of Big Horn County residents have regular or somewhat frequent contact with tourists.**

**Table 22: Resident Behavior Toward Tourists**

Behavior	Statewide %	Big Horn County %
Make them feel welcome	59%	75%
No specific reaction	34%	17%
Try to avoid them	7%	8%

**Residents of Big Horn County seem to be very friendly toward tourists.**

**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 (Table 14). Another measure of community attachment is based on opinions which residents hold about the community (Table 23).

Residents indicated their level of agreement with each of four statements on a scale of 1 (Strongly disagree) to 4 (Strongly agree). A response greater than 2.5 indicates agreement. Finally, Table 24 presents the degree to which respondents felt their community is growing and at what rate.

Statewide. The Index of Community Attachment (i.e., the mean averages) in Table 23 indicates that statewide respondents were quite attached to their community. An average rating of 3.16 (on a scale from 1 to 4) shows that these residents like where they live. Respondents were very positive in their feelings about their community except in regard to their opinions about its future. This item had the lowest average score for the four items making up the community attachment index (Table 23).

Residents were asked whether they perceived the population of their community to be changing and, if so, at what rate. Statewide, 71 percent of respondents felt that the population of their community was growing, and 11 percent reported that it was decreasing (Table 24). Of those who felt the population was changing, almost half felt it was changing too fast, while 46 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 thought it was growing too fast. However, Montana residents are a little uncertain about the future of their community.

Big Horn County. County residents surveyed did not show the same level of community attachment as the state sample (Table 23) in spite of the fact that local residents had lived in their county longer than the statewide sample (Table 14). Big Horn County residents feel as strongly as the state sample that residents should be involved in decision making, but rated significantly lower on the statements "If I had to move

away..." and "I'd rather live in my community...". Big Horn residents were even more unsure of their future than the statewide sample.

Although half the respondents feel the county is growing, a significant proportion feel it is not changing. The greatest number feel the community is growing at about the right speed (Table 24).

**Table 23: Community Attachment Statements**

<b>Statement:</b>	<b>Statewide Mean*</b>	<b>Big Horn County Mean*</b>
It is important that the residents of my community be involved in decisions about tourism	3.43	3.42
If I had to move away from my community, I would be very sorry to leave	3.34	2.62
I'd rather live in my community than anywhere else	3.08	2.38
I think the future of my community looks bright	2.79	2.30
<b>Index of Community Attachment</b>	<b>3.16</b>	<b>2.68</b>

**Big Horn County respondents are significantly less attached to their community than others statewide as measured by these statements.**

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

**Table 24: Perceptions of Community Growth**

	<b>Statewide %</b>	<b>Big Horn County %</b>
<b>How is the population changing in your community?</b>		
Growing	71%	50%
Decreasing	11%	14%
Not changing	18%	36%
<b>If changing, is your community changing..</b>		
Too fast?	49%	34%
About right?	46%	61%
Too slow?	5%	6%

**Half of Big Horn County residents do not feel like the county is growing.**

## The 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, freedom from stressors such as crime and unemployment, and overall livability issues such as cleanliness and friendliness.

To that end, respondents were asked to rate the condition of a number of factors that influence the quality of community life using a four point scale ranging from 4 (very good condition) to 1 (very poor condition), or "don't know". Table 25 is a listing of various factors that influence the quality of community life. Again, scores less than 2.5 indicate perceptions of poor conditions while scores greater than 2.5 indicate perceptions of good conditions.

Statewide. Overall, respondents felt that emergency services, overall community livability, opportunities for museums and cultural experiences, and parks & recreation areas were in good to very good condition. In the opinion of the respondents, factors which need improvement included job opportunities, condition of roads and highways, cost of living, and traffic congestion.

Big Horn County. Big Horn County respondents rated museums and cultural centers, infrastructure, and traffic to be in good condition in their counties. On the other hand, respondents felt that job opportunities, safety from crime, overall cleanliness, and condition of roads and highways were in need of improvement (Table 25).

**Table 25: The Quality of Community Life**

How would you rate <i>the present condition of...</i>	Statewide Mean*	Big Horn County Mean*
Emergency services (police, fire, etc)	3.37	2.57
Overall community livability	3.20	2.78
Museums and cultural centers	3.19	3.30
Parks and recreation areas	3.10	2.95
Educational system	3.07	2.70
Overall cleanliness and appearance	2.96	2.24
Infrastructure (water, sewer, etc.)	2.93	3.22
Safety from Crime	2.91	2.23
Traffic congestion	2.41	3.22
Cost of living	2.36	2.64
Condition of roads and highways	2.35	2.43
Job opportunities	2.08	1.78

**Big Horn County residents rate museums & cultural centers, infrastructure, traffic conditions, parks & recreation, and overall community livability of Big Horn County to be in good to very good condition.**

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



## **Influence of Tourism on Quality of Community Life**

Residents' attitudes about factors that influence the quality of community life will give planners an idea of the image which their own residents hold of their community. These factors can be perceived as good or bad for a number of reasons, and some of these factors can change quite quickly. Traffic may be perceived as terribly congested because highway construction has detoured traffic through a normally quiet part of town. Feelings of safety from crime may be shaken by a random act.

Of importance to this study was the extent to which residents felt that tourism influenced the quality of community life. Respondents were asked to rate the influence that tourism had on these quality of community life variables. The scale included values for positive influence, both positive and negative influence, negative influence, no influence, and don't know.

Statewide. Overall, respondents felt that tourism had more of a negative than positive impact on most of these factors of community life. Those items on which respondents thought tourism had a more positive impact included museums and cultural centers, job opportunities, and park and recreation areas. Factors upon which tourism has a more negative impact include traffic congestion, safety from crime, condition of roads and highways, and cost of living (Table 26).

Big Horn County. Big Horn County residents believe that tourism has a positive influence on museums and cultural centers (75%), job opportunities (42%), and park and recreation areas (31%). County residents believe that tourism has a decidedly more negative than positive impact on safety from crime (26%), and traffic congestion (40%) (Table 26).



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

**The Influence of Tourism on:**

		<b>No Influence</b>	<b>Negative Influence</b>	<b>Positive &amp; Negative</b>	<b>Positive Influence</b>	<b>Don't Know</b>
Emergency services (police, fire, etc)	<b>Big Horn County</b> <b>24%</b> <i>Statewide</i>	<b>39</b>	<b>14</b>	<b>22</b>	<b>11</b>	<b>11</b>
Museums and cultural centers		<b>3</b>	<b>1</b>	<b>15</b>	<b>75</b>	<b>7</b>
		<i>9</i>	<i>2</i>	<i>16</i>	<i>64</i>	<i>10</i>
Job opportunities		<b>13</b>	<b>13</b>	<b>25</b>	<b>42</b>	<b>7</b>
		<i>19</i>	<i>12</i>	<i>29</i>	<i>35</i>	<i>7</i>
Educational system		<b>43</b>	<b>13</b>	<b>20</b>	<b>15</b>	<b>9</b>
		<i>52</i>	<i>9</i>	<i>18</i>	<i>10</i>	<i>11</i>
Cost of living		<b>15</b>	<b>21</b>	<b>35</b>	<b>22</b>	<b>8</b>
		<i>18</i>	<i>32</i>	<i>32</i>	<i>9</i>	<i>9</i>
Safety from Crime		<b>18</b>	<b>26</b>	<b>34</b>	<b>10</b>	<b>12</b>
		<i>23</i>	<i>32</i>	<i>30</i>	<i>4</i>	<i>10</i>
Condition of roads and highways		<b>10</b>	<b>21</b>	<b>42</b>	<b>19</b>	<b>8</b>
		<i>12</i>	<i>40</i>	<i>30</i>	<i>12</i>	<i>6</i>
Infrastructure (water, sewer, etc.)		<b>30</b>	<b>15</b>	<b>33</b>	<b>9</b>	<b>14</b>
		<i>38</i>	<i>21</i>	<i>22</i>	<i>6</i>	<i>12</i>
Traffic congestion		<b>10</b>	<b>40</b>	<b>31</b>	<b>12</b>	<b>7</b>
		<i>11</i>	<i>58</i>	<i>20</i>	<i>7</i>	<i>5</i>
Overall community livability		<b>24</b>	<b>7</b>	<b>41</b>	<b>19</b>	<b>9</b>
		<i>22</i>	<i>18</i>	<i>41</i>	<i>11</i>	<i>9</i>
Parks and recreation areas		<b>9</b>	<b>11</b>	<b>39</b>	<b>31</b>	<b>5</b>
		<i>11</i>	<i>13</i>	<i>40</i>	<i>31</i>	<i>6</i>
Overall cleanliness and appearance		<b>11</b>	<b>17</b>	<b>43</b>	<b>24</b>	<b>6</b>
		<i>11</i>	<i>23</i>	<i>39</i>	<i>21</i>	<i>7</i>

**Big Horn County residents believe that tourism has a more positive than negative influence on museums and cultural centers, job opportunities, overall livability and cleanliness of the community, as well as park and recreation areas.**

**See circled items.**

**On the other hand, tourism is seen as having a more negative than positive impact on public safety, infrastructure, and traffic congestion.**

**See boxed items.**

**\*Big Horn County percentages in boldface, statewide percentages in italics.**

## **RESIDENTS' ATTITUDES AND OPINIONS ABOUT TOURISM**

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

### **Support for Tourism Development**

Some questions addressed general support for tourism development while others addressed more specific aspects of tourism. Table 27 presents responses to statements related to support for tourism development along with an average response for each item.

Statewide. Over two-thirds of respondents believed that their community/county was an attractive place to invest in tourism development. Sixty-four percent believe that tourism would help their community/county grow in the "right" direction. Eighty-five percent believe that tourism promotion by Montana benefits their community/county. Over eighty percent support continued tourism promotion by Montana. Not as many residents believe that they would personally benefit if tourism increased in their county. Only 31 percent felt they would personally benefit by increased tourism. Over three-quarters of respondents believed that the benefits of tourism outweighed the negative effects. Finally, respondents were about equally split on whether increased tourism would result in increased quality of life in their community/county with 48 percent disagreeing and 52 percent agreeing (Table 27).

Big Horn County. Eighty-eight percent of Big Horn residents think tourism promotion by Montana benefits Big Horn County, and 87 percent support continued tourism promotion efforts by the state. Over 80 percent of respondents believe the benefits of tourism outweigh the negative impacts. Big Horn County residents were more likely than statewide respondents to feel that tourism would help their county grow in the "right" direction, that increased tourism would improve the quality of life in their county, and that they would personally benefit from increased tourism (Table 27).

**Table 27: Support for Tourism Development**

Statement:		Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score**
Tourism promotion by Montana benefits Big Horn County economically	<b>Big Horn Co.</b>	<b>33%*</b>	<b>55%</b>	<b>12%</b>	<b>0%</b>	<b>3.21</b>
	<i>Statewide</i>	<i>23</i>	<i>62</i>	<i>12</i>	<i>3</i>	<i>3.04</i>
I support continued tourism promotion and advertising to out-of-state visitors by the State of Montana		<b>43</b>	<b>44</b>	<b>10</b>	<b>3</b>	<b>3.27</b>
		<i>30</i>	<i>52</i>	<i>11</i>	<i>7</i>	<i>3.05</i>
The overall benefits of tourism outweigh the negative impacts		<b>20</b>	<b>63</b>	<b>10</b>	<b>8</b>	<b>2.94</b>
		<i>14</i>	<i>62</i>	<i>17</i>	<i>7</i>	<i>2.83</i>
Increased tourism would help Big Horn County grow in the right direction		<b>30</b>	<b>51</b>	<b>11</b>	<b>7</b>	<b>3.05</b>
		<i>19</i>	<i>45</i>	<i>26</i>	<i>10</i>	<i>2.74</i>
If tourism increases in Montana, the overall quality of life for Montana residents will improve		<b>15</b>	<b>55</b>	<b>21</b>	<b>9</b>	<b>2.76</b>
		<i>6</i>	<i>46</i>	<i>37</i>	<i>11</i>	<i>2.47</i>
I will benefit financially if tourism increases in Big Horn County		<b>12</b>	<b>24</b>	<b>39</b>	<b>26</b>	<b>2.22</b>
		<i>8</i>	<i>23</i>	<i>43</i>	<i>25</i>	<i>2.15</i>
My community/county is an attractive place to invest in new tourism development		<b>20</b>	<b>42</b>	<b>35</b>	<b>4</b>	<b>2.78</b>
		<i>21</i>	<i>47</i>	<i>26</i>	<i>6</i>	<i>2.83</i>

**Big Horn County residents are generally more positive than the statewide sample toward tourism development.**

\* **Big Horn County percentages in boldface**, *statewide percentages in italics*.  
 \*\* Scores represent mean responses measured on a scale from 4 (Strongly Agree) to 1 (Strongly Disagree).

## Concerns about Increased Tourism

Residents of a community may become concerned about changes which will impact the quality of life they have come to expect in their community. Increased tourism brings with it a number of changes in any community. The extent to which residents see these changes as positive or negative will impact their support for tourism development. A 4-point scale was used for responses.

Statewide. Over three-fourths (78%) of Montanans surveyed would support land-use regulations to control future growth in their community. Over half (52%) of respondents agreed that vacationing in Montana influenced too many people to move here. In spite of this, 61 percent do not feel like the state is becoming overcrowded by tourists (Table 28).

Big Horn County. Seventy-eight percent of Big Horn County respondents agreed that they would support land use regulations to control the future growth of their community. Big Horn County respondents were less concerned about the migration of nonresidents to Montana and were less likely to feel that the state was becoming overrun by tourists than was the statewide sample. Over half (54%) of Big Horn County respondents disagreed that vacationing in Montana influenced too many people to move here, and over three-fourths (76%) disagreed with the statement that the state was becoming overcrowded because of more tourists.

**Table 28: Concerns about Increased Tourism**

Statement:		Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score**
I would support land-use regulations to help control the type of future growth in my community/county.	<b>Big Horn Co.</b>	<b>15%</b>	<b>63%</b>	<b>13%</b>	<b>8%</b>	<b>2.85</b>
	<i>Statewide</i>	<i>24</i>	<i>54</i>	<i>16</i>	<i>6</i>	<i>2.97</i>
Vacationing in Montana influences too many people to move to Montana		<b>13</b>	<b>33</b>	<b>43</b>	<b>11</b>	<b>2.48</b>
		<i>21</i>	<i>31</i>	<i>42</i>	<i>6</i>	<i>2.67</i>
In recent years, the state is becoming overcrowded because of more tourists		<b>5</b>	<b>20</b>	<b>60</b>	<b>16</b>	<b>2.14</b>
		<i>14</i>	<i>25</i>	<i>51</i>	<i>10</i>	<i>2.43</i>

**Big Horn County residents would support land-use regulations to control future development, and don't feel the state is becoming overcrowded by tourists.**

\* **Big Horn County percentages in boldface**, statewide percentages in italics.

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

## Concerns about Land Use Issues

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

Statewide. Seventy percent of respondents agreed that there was adequate undeveloped open space in their community/county. Over two-thirds (68%) were concerned about the disappearance of open space. Only 37 percent of respondents felt that their access to recreation opportunities was limited because of the presence of out-of-state visitors (Table 29).

Big Horn County. Eighty-eight percent of respondents agreed that there was adequate undeveloped open space in Big Horn County compared to 70 percent statewide. Also, County residents were less concerned about the potential loss of open space in their county than the statewide sample. Big Horn County residents do not feel that the presence of tourists limits their access to recreational opportunities.

**Table 29: Land Use Issues**

Statement:		Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score**
There is adequate undeveloped open space in my community/county.	<b>Big Horn Co.</b> <i>Statewide</i>	<b>31%*</b> 18	<b>57%</b> 52	<b>11%</b> 17	<b>1%</b> 13	<b>3.18</b> 2.77
I am concerned about the potential disappearance of open space in my community/county		<b>14</b> 31	<b>26</b> 37	<b>51</b> 28	<b>9</b> 4	<b>2.46</b> 2.95
My access to recreational opportunities is limited due to the presence of out-of-state visitors		<b>7</b> 10	<b>18</b> 27	<b>58</b> 54	<b>17</b> 10	<b>2.14</b> 2.37

**Residents feel like there is adequate undeveloped open space in Big Horn County, are less concerned about it's disappearance and feel access is less limited than the statewide sample.**

\* **Big Horn County percentages in boldface**, statewide percentages in italics.  
 \*\* Scores represent mean responses measured on a scale from 4 (Strongly Agree) to 1 (Strongly Disagree)

## Tourism Related Decision Making

Residents have strong feelings about participation in decisions which will ultimately affect their community and their own lives. Residents were asked to respond to two items related to who should be making decisions about tourism development in their community/county.

Statewide. Respondents feel strongly that residents be involved in decision making about local tourism development. Forty-nine percent of respondents strongly agreed with the statement "It is important that residents of my community/county be involved in decisions about tourism". Sixty-one percent of respondents disagreed with the statement "decisions about how much tourism there should be in my community/county are best left to the private sector" (Table 30).

Big Horn County. Respondents from Big Horn County feel as strongly as statewide respondents on the issue of tourism-related decision making. Ninety-eight percent of county respondents agree that residents should be involved in tourism-related decisions made for the county. Almost half (49%) feel that decisions about tourism development should not be left entirely to the private sector.

**Table 30: Tourism-Related Decision Making**

Statement:

		Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score**
It is important that residents of my community/county be involved in decisions about tourism.	<b>Big Horn Co.</b>	<b>45%</b>	<b>53%</b>	<b>3%</b>	<b>0%</b>	<b>3.42</b>
	<i>Statewide</i>	<i>49</i>	<i>46</i>	<i>5</i>	<i>&lt;1</i>	<i>3.43</i>
Decisions about how much tourism there should be in my community/county are best left to the private sector.		<b>18</b>	<b>41</b>	<b>31</b>	<b>18</b>	<b>2.36</b>
		<i>12</i>	<i>28</i>	<i>44</i>	<i>17</i>	<i>2.34</i>

**Residents feel strongly that tourism decisions should include input from the community and not just the business sector.**

\***Big Horn County percentages in boldface**, *statewide percentages in italics.*

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

## Advantages/Disadvantages of Tourism Development

To further clarify the perceived benefits and costs of tourism development, respondents were asked to provide the top advantage and disadvantage of increased tourism in their community. This was an open-ended question with respondents providing their own thoughts and wording. The suggestions were then assigned to general categories for comparison. Table 31 lists the top advantages and Table 32 lists the top disadvantages of increased tourism. Appendix B contains a list of all Big Horn County responses.

Statewide: The top advantages by all respondents were overall economic benefits, i.e. dollars, jobs, profit, etc. Over 80 percent of the statewide sample indicated employment, jobs, and profits for local businesses as the top advantages (Table 31). Wear and tear on roads/infrastructure stress and overcrowding at attractions lead the disadvantages cited by statewide respondents (Table 32).

Big Horn County: As with the statewide sample, economics are seen as the primary benefit of increased tourism. Economic benefits cited include more dollars, more jobs, profit for local businesses, etc. (Table 31). Also, disadvantages of increased tourism cited by Big Horn County residents included wear & tear on roads/infrastructure stress, and overcrowding at attractions (Table 32).

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

<b>Top Advantage:</b>	<b>Statewide %</b>	<b>Big Horn County %</b>
Overall economic benefit: dollars, jobs, profit for business.	<b>85%</b>	<b>78%</b>
No advantage	8%	6%
Chance to "show off" Montana lifestyle	2%	2%
Off-set taxes	1%	
Learning about other cultures/meeting new people	1%	1%
Enhancing recreation opportunities	1%	
Promotes community growth/diversity	1%	5%
Increased awareness to preserve open & wild space	1%	2%
Attracts new business ideas	1%	3%
Promotes community cleanliness	1%	
Clean Industry	1%	1%

**Overall economic benefit including new dollars into the community, the creation of jobs, and profits for local businesses lead the list of advantages cited by Big Horn County respondents.**



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

Main Disadvantage:	Statewide &	Big Horn County
Wear & tear on roads; increased traffic & congestion	25%	21%
Overcrowding at attractions	17%	14%
Drives prices up, increased cost of living, more taxes	10%	4%
Abuse of land; pressure on resources/hunting pressure	8%	1%
No disadvantage	8%	11%
Migration, unwanted advise from visitors	6%	3%
No sales tax/tourists don't fully pay for services they use	6%	3%
Less security and safety, loss of way of life, decreasing quality of life	4%	3%
Illegal activity (drugs, crime, etc) loss of peace	3%	5%
Litter/pollution	3%	5%
Low paying jobs	2%	3%
Lack of services, accommodations, amenities, etc	2%	10%
Commercialism/development/growth	2%	

**Big Horn County respondents see wear and tear on the roads, increased traffic and congestion as the top disadvantage to increased tourism.**

## BIG HORN COUNTY SPECIFIC QUESTION RESULTS

The Big Horn County Community Tourism Assessment Planning (CTAP) team was given the opportunity to include questions specific to Big Horn County in the questionnaire. The content of these questions was decided during the first community meeting for the CTAP process. The following section of the report addresses these questions and other community-specific information.

### Participation in County Attractions and Events

Big Horn County residents were asked to indicate whether they used recreational areas and facilities or participated in area events during the past 5 years. Other than visiting the town of Hardin, the most popular attractions and events for Big Horn County residents were participating in Little Big Horn Days (88%), visiting the Big Horn Canyon National Recreation Area (83%), and visiting the Big Horn County Historical Museum (82%) (Table 33). On the whole, county residents were very supportive of local recreational opportunities and facilities based on their own visitation/participation. The least visited/participated in area or attraction for Big Horn County residents included hunting or fishing with guides (11%), and visiting the Rosebud Battlefield (19%).

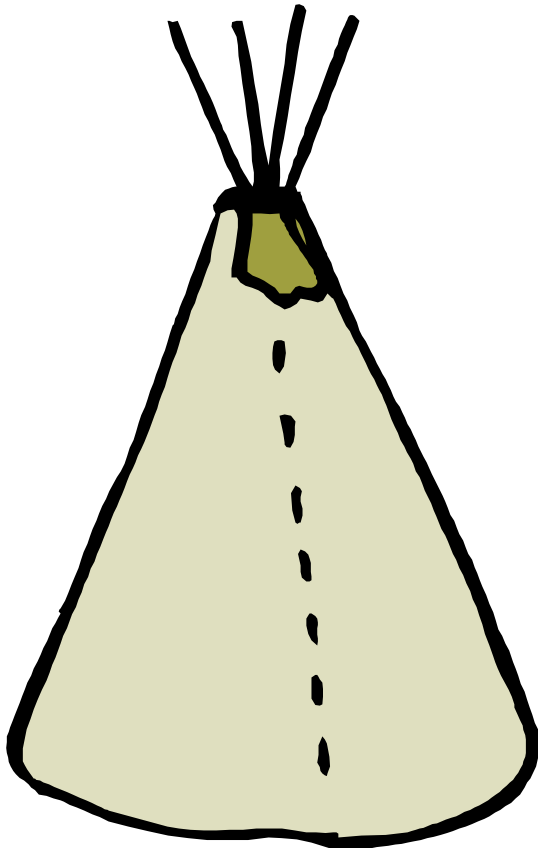
**Table 33: Participation in County Attractions and Events by Big Horn County Residents**

Attraction/Event	Participation by Big Horn Residents %
<b>Attractions</b>	
Bighorn Canyon National Recreation Area	83%
Little Bighorn Battlefield	75%
Big Horn County Historical Museum	82%
Chief Plenty Coups State Park	37%
Jail House Gallery	66%
Hunting and Fishing with Guides	11%
Hunting and Fishing without Guides	66%
Visiting Town of Hardin	94%
Rosebud Battlefield	19%
Tongue River Reservoir	49%
<b>Events</b>	
Custer's Last Stand Reenactment	64%
Crow Fair	57%
Little Bighorn Days	88%
St. Xavier 4 <sup>th</sup> of July Rodeo	46%
1976 Grand Ball (Military Ball)	40%

**Local residents take advantage of most area attractions and events**

## Recommend Attractions and Events

In addition to asking Big Horn County residents whether they used/participated in area attractions and events, residents were asked to indicate the extent to which they would recommend these attractions and events to visiting out-of-town friends or relatives. Overall, Big Horn County residents were very positive about recommending area attractions and events to visitors. Using an 5 point scale ranging from 1 (would not recommend) to 5 (would recommend strongly) all attractions and events achieved average scores above 3.5 (Table 34). Attractions and events which Big Horn County residents would most strongly recommend to out-of-town visitors include the Bighorn Canyon National Recreation Area, Little Bighorn Battlefield, and the Big Horn County Historical Museum. Although still receiving respectable positive scores, Big Horn County residents were less likely to recommend fishing and hunting with guides, and visiting the Rosebud Battlefield. Other recommended events and attractions include quilt shows, Lame Deer's July 4<sup>th</sup> Pow Wow, and a Space Port. See Appendix B for a complete list of other attractions which were recommended.



**Table 34: Recommended Attractions and Events**

Attraction/Event	Strongly Recommend	Unsure	Would NOT Recommend	Mean		
<b>Attractions</b>						
Bighorn Canyon National Recreation Area	69%	24%	6%	0%	2%	4.58
Little Bighorn Battlefield	63	27	8	0	2	4.51
Big Horn County Historical Museum	61	26	9	2	2	4.44
Chief Plenty Coups State Park	31	26	37	4	2	3.78
Jail House Gallery	37	29	29	3	3	3.95
Hunting and Fishing with Guides	29	13	38	3	17	3.32
Hunting and Fishing without Guides	41	21	18	7	13	3.69
Visiting Town of Hardin	29	34	19	11	7	3.65
Rosebud Battlefield	22	23	48	5	2	3.57
Tongue River Reservoir	37	32	24	4	3	3.94
<b>Events</b>						
Custer's Last Stand Reenactment	64	18	14	0	5	4.37
Crow Fair	28	37	25	5	6	3.77
Little Bighorn Days	57	24	15	1	4	4.31
St. Xavier 4 <sup>th</sup> of July Rodeo	38	29	32	0	2	4.00
1976 Grand Ball (Military Ball)	50	20	19	3	7	4.03

**Little Big Horn County residents recommend Big Horn County attractions and events.**

**Best Opportunity for Tourism Development**

Big Horn County residents were asked to identify the one area attraction or event which offered the best opportunity for tourism development and/or promotion for Big Horn County. Residents were allowed to select only one of the attractions and events listed above or to offer additional recommendations (Table 35). Custer’s Last Stand Reenactment and Little Bighorn Days were by far the most popular choices for tourism promotion (Table 35).

**Table 35: Best Opportunity for Tourism Promotion**

<b>Best Opportunity:</b>	<b>Big Horn County %</b>
Bighorn Canyon National Recreation Area	3%
Little Bighorn Battlefield	8%
Big Horn County Historical Museum	2%
Chief Plenty Coups State Park	--
Jail House Gallery	1%
Hunting and Fishing with Guides	1%
Hunting and Fishing without Guides	5%
Town of Hardin	1%
Rosebud Battlefield	--
Tongue River Reservoir	--
Custer's Last Stand Reenactment	<b>35%</b>
Crow Fair	4%
Little Bighorn Days	<b>34%</b>
St. Xavier 4 <sup>th</sup> of July Rodeo	3%
1876 Grand Ball (Military Ball)	3%

**GENERAL COMMENTS**

Table 36 contains a summary of the general comments received with the survey. Comments were grouped together by theme to make this table. For a complete list of all comments received from Big Horn County respondents, see Appendix B.

**Table 36: General Comments**

	<b>Comments</b>
Need to improve law enforcement, decrease criminal activity, get drunks off the street	10
Need to improve community cleanliness	3
Poor highway maintenance and poor planning hurts tourism	2
Don't need minimum wage jobs	3
Need more shopping opportunities	3
Need to recognize exceptional customer service, become more service oriented	2
Other Comments	26

Comments were contributed by 49 respondents.

## **APPENDIX A: BIG HORN COUNTY SURVEY**









## **APPENDIX B: BIG HORN COUNTY RESPONSES AND COMMENTS**

### **Other Top Advantages of Increased Tourism in Big Horn County**

- No advantage
- Chance to "show off" Montana lifestyle/exposure
- Learning about other cultures/meeting new people
- Promotes community growth/diversity
- Increased awareness to preserve open/wild spaces/local issues
- Attracts new business/ideas
- Clean industry
- Off-sets NAFTA on area agriculture

### **Other Top Disadvantages of Increased Tourism in Big Horn County**

- No sales tax/Tourists don't fully pay for services they use
- Migration; unwanted "life management" advice from nonresidents
- Illegal activity (drugs, crime, etc.)/disruption of peace
- No regard for "local customs" by tourists/attracts undesirable people
- Litter/pollution
- Low paying jobs
- Less security and safety; loss of way of life/decreasing quality of life
- Abuse of land; pressure on natural resources/hunting pressure
- Drives prices up (in general, real estate, etc.)/increased cost of living, higher taxes, more resort-type taxes
- Community/land use changes; loss of land-owner rights
- Excessive transient population/drunks
- Resident animosity toward tourism
- Community appearance is less than desirable/NA reserv. Is undesirable
- Animosity of locals toward Indians
- Only few businesses gain from it
- Change in types of people
- Benefits don't remain in local community/county

### **Other Events/Attractions to Promote in Big Horn County**

- Lame Deer's 4<sup>th</sup> of July Pow Wow
- Quilt Shows
- Draft horse shows
- Space port
- Gambling
- Trade Shows

## **Other Opportunity for Economic Development in Big Horn County**

- College
- Government
- Retirement
- Museums and cultural centers/historic preservation
- Space port
- Small business
- Information
- Entertainment
- Venture Star

### **BIG HORN COUNTY RESIDENT COMMENTS**

#### **Need to Improve Law Enforcement, Decrease Criminal Activity, and Get the Drunks off the Street**

One of the most important changes that needs to be made in Hardin is to get the drunks off the streets! The second most important is improving our law enforcement!

Merchants and residents need to develop a welcoming attitude toward tourists, become more service-oriented like Cody, WY. Town needs to get tough on public drunkenness and get the bums off the streets. It portrays a terrible image of the town.

As I stated earlier, it is almost impossible for business people in Hardin to find people to staff their business. This county has the highest unemployment rate in the state. No one wants to work (welfare is a far better program). The business I previously worked for is in the process of closing due to lack of help. The intoxicated pedestrians as well as the daily panhandlers in front of downtown businesses are real draws for tourism. Sorry to sound so negative, but we need to clean up the community, stress the importance of work to a certain sanction of society, so that we may staff the businesses to provide the services to tourists. Get the drunks off the street.

I am concerned that the drunks on the street have a bad influence on Hardin and it does not reflect well that law enforcement seems to do little about the problem. I personally do not have the time or the resources (i.e. drunks' names) to file reports on them when approached on the downtown sidewalks.

The sheriff department needs to be improved. They aren't doing the job they should.

#### **Need Community Cleanliness**

Our downtown area is not as attractive and clean as it could be. Many tourists have also voiced that opinion.

As I stated earlier, it is almost impossible for business people in Hardin to find people to staff their business. This county has the highest unemployment rate in the state. No one wants to work (welfare is a far better program). The business I previously worked for is in the process of closing due to lack of help. The intoxicated pedestrians as well as the daily panhandlers in front of downtown businesses are real draws for tourism. Sorry to sound so negative, but we need to clean up the community, stress the importance of work to a certain sanction of society, so that we may staff the businesses to provide the services to tourists. Get the drunks off the street.

Some residents of the community allow their property to decay to the point of it being a detriment to the impression the area leaves on visitors.

### **Poor Highway Maintenance and Poor Planning Hurts Tourism**

We need to build a highway from Fort Smith into Wyoming. We need better signage on the Interstate and in town. The community should help restore the Hardin Depot and find investors to put businesses in the 3<sup>rd</sup> Street building. We need to encourage Wal Mart, the Space Port, and vote on issues like the private prison, not let the commissioners put down development or stop progress on the new airport.

Highways outside of I-90 are in such poor condition. They also dead end. St. Xavier to Pryor is good. Pryor to Carbon County, Red Lodge (an excellent route for tourists) is made of gravel, causing damage to recreational vehicles, thus causing Western Wyoming recreation visitors to visit elsewhere and pass the word to other state visitors. The route is of excellent potential for visitors to Yellowstone Park via Red Lodge, MT.

### **Don't Need Minimum Wage Jobs**

Big Horn County could be much better than it is. It is discouraging to see families have to leave because of low wages and not enough job opportunities. People need good paying jobs and time with their families instead of having to juggle three or four part-time jobs to make ends meet.

What about the single parents? How can a person survive if jobs do not pay enough to support their kids and themselves? There are not enough clothing stores such as Kmart, Wal Mart, or grocery stores. Buttrey, Osco, County Market and Albertsons in this town.

### **Need More Shopping Opportunities**

What about the single parents? How can a person survive if jobs do not pay enough to support their kids and themselves? There are not enough clothing stores such as Kmart, Wal Mart, or grocery stores. Buttrey, Osco, County Market and Albertsons in this town.

Another super market.

## **Need to Recognize Exceptional Customer Service/Become More Service-Oriented**

Merchants and residents need to develop a welcoming attitude toward tourists, become more service-oriented like Cody, WY. Town needs to get tough on public drunkenness and get the bums off the streets. It portrays a terrible image of the town.

I feel the Hardin merchants do not have any gratuities from monies received from the visitors or especially from Indians (at least sales clerks). There needs to be some awareness made on delivering exceptional customer services to all customers.

## **Miscellaneous**

Little Bighorn Re-enactment committee should pay better wages considering the risks and amount of tourists who come to watch each performance. This year they didn't feed the actors and performers.

I really have no problems with ranchers and farmers to an extent. But where I have a problem is with mining industry factors that tear up the land and pollute the land. There are already too many people living in Montana. We don't need their money and we don't need them staying either. I hate tourism.

You don't know how much I would like to see Hardin grow. Also, I would like to see Mr. Smith do some more restoration. Our little town deserves it. It had more life in the horse and buggy days. Buggy rides and sleigh rides wouldn't be bad.

We need more excitement for teenagers. Would like to see the re-enactment event more than once a year, and a nice street dance with a good band. I feel the police department chases all happy feeling out of any get-together. We had a dance with only 25 people there, and 7 cops came out and just stood there. Nothing was happening, just looked like the police wanted to start something.

Hope the depot restoration is successful.

We need a web site that is professionally done and will not embarrass us. The current web pages contain errors.

Bighorn Canyon has to somehow improve the fishing because despite its scenic qualities, people will come in groves to fish since people are always looking for somewhere new to fish. All the Little Bighorn Battlefield needs is a major motion picture or some other type of rekindled interest to newer generations.

I decry the attitude toward wildlife that the local Native American has. I personally saw one shoot an antelope and left it lay. [Personal name] found a shot fawn left on the gray blanket road this fall. My neighbor claims he shot a female Bighorn Sheep this fall near Wyola. If she was pregnant, it could have been the beginning of a new herd right here.

Agencies spend millions trying to start herds in new places. It is insane and despicable to have such a wasteful attitude about such a precious commodity.

I work for the Federal Government and a lot of tourists call months ahead - sometimes a year ahead - and ask for brochures, etc. These people will visit and take advantage of any extras along the way. The town of Hardin gives more attention to the Battlefield than they do Bighorn Canyon. The county does include Bighorn Canyon, too, but not always to their benefit. County could do more to cooperate with the Park Service to make a visitor's visit a more total experience.

Tourism should definitely be promoted but visitors should share in the cost of services with a local resort tax or state sales tax.

## **APPENDIX C: STATEWIDE COMMENTS**

### **Montana Has Been or Will Be Damaged by Outside Influences**

The Californication of Montana has irreparable damaged the quality of life in the once great state of Montana! Flathead Lake and Georgetown Lake (my area) are two prime examples of Californication, a social condition loathed by all Montanans.

If we continue to let tourists visit, move to, and raise our cost of living (housing, land, accessibility to land) we will drive our state into the ground. We are allowing them to make our state into the kind of places they are moving from. We need to open our eyes while we still have time to put a stop to it.

I do not care to see southwest Montana as another Jackson Hole, WY. People will come to Montana no matter what, as this is the last best place!

I operate 2 service businesses for agriculture and a retail business for ag/residential fencing. I spend half to two-thirds of my year away from home, in motels, earning a living. The bed tax is not doing anything for me or the people I work for. Agriculture is dying in my part of Stillwater County due to low to non-existent profits, decreasing availability of opportunities in ag, decreasing affordable land. I know people live off tourism as I do from ag, but increased tourism will destroy what they came to look at. We already have people quarreling over who gets to use the forests, the trails, the water in the lakes and streams, the roads, etc. Just as Yellowstone Park has a limit on what it can handle, so does our state and our people. Just be a landowner during hunting season once to test the limit.

Having agriculture and "space" in many of my past experiences, including childhood, it isn't easy to see recreation and tourism become so much a priority. The changes bring a whole different breed of neighbors.

Tourism-based economies do not promote, protect, or otherwise assist residents (local) in maintaining quality of life. Many examples of tourism playgrounds destroying the ability of local residents to continue to afford to live where they choose are in the west.

I hate to see so many large areas of Montana being bought by extremely wealthy celebrities.

### **Montana Needs a Sales Tax/Community Needs a Resort Tax**

State tax would also help, especially during tourist season so that everybody would contribute to Montana's economic growth, not just Montanans!

I feel we need a small sales tax or other way for tourists to contribute to Montana's economy. The property owner gets taxed too much.

I think we need to have a sales tax to provide tourists with the opportunity to better support out state financially.

We need a sales tax!

I would very much like to see a tax bill for commodities with guarantees that it will eliminate income tax or reduce property and business taxes.

We have to get more reasonable paying jobs for citizens. We must not let our education system go downhill. We need to lower (set) reasonable speed limits. We need to improve highway 93 - end to end. We need to reduce property taxes. Ness a sales tax for nonresidents.

Tourism provides a good economic boost to Montana. Tourists must pay their fair share of Montana's expenses for the services they use, and property owners need the burden shifted off. We need to replace the property tax with a sales tax.

Tourism can be a good thing if it isn't forgotten that when tourist season is over, it is the people that live here that support the businesses. Don't increase costs, add taxes (i.e. bed tax and resort tax) because wages here often do not meet the cost of living. In other words, don't screw the people that support you when the tourists go home.

Montana needs a sales tax. Tourists really get off the hook without it.

I feel our best source of tourism income could be in the form of a sales tax. I would only be in favor of such a tax if there were adjustments made in the property tax structure. A sales tax would provide income from people traveling into the state and using our resources - highways, rest areas, etc. Also, it would insure that everyone carried a share of the burden.

### **Support Increased Tourism; Tourism is Good Economic Boost**

Tourism is a great industry and one which promotes the natural beauty of the state. However, it is not the total answer because tourism jobs are typically low paying, seasonal, and transitional. Our biggest economic hurdle is developing the types of business and industry that provides better pay.

I love to see tourists come and spend their money, but do not want them to stay. The out-of-staters can afford to buy Montana, but Montanans can't!

I am very supportive of promoting increased tourism. I sincerely hope that it does not impede our progress in other areas, like decreasing crime and reforming education.

Tourism provides a good economic boost to Montana. Tourists must pay their fair share of Montana's expenses for the services they use, and property owners need the burden shifted off. We need to replace the property tax with a sales tax.



Tourism overcrowds roads that are already too heavily trafficked by local people and residents. However, tourism brings money into our town.

### **Montanans Don't Need Minimum Wage Jobs/Tourism Only Provides Minimum Wage Jobs**

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Job opportunities from increased tourism are at the very bottom of the local pay scale, and the last time I noticed Montana's wages are at the very bottom nationwide. These are not even minimalist survival wages that you are discussing; why bother?

We have to get more reasonable paying jobs for citizens. We must not let our education system go downhill. We need to lower (set) reasonable speed limits. We need to improve highway 93 - end to end. We need to reduce property taxes. Ness a sales tax for nonresidents.

Montana is still about 40 years behind other places - no industries. We pay to educate children then they leave to other state to make a living. Pretty sad in this area! Tourism is fine but only for the tourists - only minimum wages for us!

Tourism brings minimum wage jobs to the state. High paying jobs provided by industry such as mining and wood products are being driven out by out-of-state environmentalists. Montana is 50<sup>th</sup> - lowest wages in the US. Do we really need more minimum wage jobs?

We need to concentrate on increasing our higher paying (non-minimum wage) jobs, not the tourism minimum wage jobs. Our education system needs to be helped by tourism dollars.

### **Tourism Industry Doesn't Maintain Quality of Life**

While I think tourism offers great opportunity for economic development, I think increased tourism can negatively impact quality of life for Montana residents.

I operate 2 service businesses for agriculture and a retail business for ag/residential fencing. I spend half to two-thirds of my year away from home, in motels, earning a living. The bed tax is not doing anything for me or the people I work for. Agriculture is dying in my part of Stillwater County due to low to non-existent profits, decreasing availability of opportunities in ag, decreasing affordable land. I know people live off tourism as I do from ag, but increased tourism will destroy what they came to look at. We already have people quarreling over who gets to use the forests, the trails, the water in the lakes and streams, the roads, etc. Just as Yellowstone Park has a limit on what it

can handle, so does our state and our people. Just be a landowner during hunting season once to test the limit.

Tourism-based economies do not promote, protect, or otherwise assist residents (local) in maintaining quality of life. Many examples of tourism playgrounds destroying the ability of local residents to continue to afford to live where they choose are in the west.

Growth has slowed recently, however, I think the more rapid growth experienced in the early 90s was too fast and the average Missoula resident wasn't the one who benefited. I think anyone with a valid Montana drivers license (or proof of residency) should not have to pay the bed tax.

### **Montana Needs More Industries/Balance Among Industries**

Montana needs to maintain a fair, even balance between industries. We depend on our natural resources to survive and do a good job of preserving them.

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### **Don't Support Tourism-Based Economy or Increased Tourism**

Agriculture, mining, and timber have been Montana's three major industries. There are too many tree huggers and other uninformed people in Montana making decisions that have hurt Montana's economy. It seems to me the money that tourists bring to our state is like a pea in a box car as to what agriculture, mining, and timber would bring to our state. Let's get back to what made Montana.

As far as tourists are concerned, they can come see and go home. We don't need the lugs out of California or the release centers. They all have motor homes. They don't spend any money here. I have heard they will go back into Idaho and buy gas there because it is cheaper.

I've traveled all over the USA and several countries during my military career. I don't believe we need to sell Montana tourism. Many folks are already aware of the vacation opportunities in our state. I'd rather see funds used for preserving land, managing wildlife resources, and providing opportunities for state residents.

I really hate to see a community or a country strictly rely on tourists for their income. It's not a reliable source. Also, businesses relying on tourists often neglect other important changes needed to be done because it will affect the amount of tourists they will get.

### **Miscellaneous**

I'm very happy to see the The University of Montana is in the fore-front of studies to help the counties and state adjust to increased tourism and development.

I lived in Golden, Colorado, and my family is from Montana so it was a second home. I can't tell you how spectacular the Montana TV promotions were! I even taped them to watch repeatedly. Thank you!

Montana has recently been the home of very high profile criminals. This is not what Montana is all about. Montana is the "Big Sky" state and in Montana is the only place you can see skies like ours. We're very lucky to live here.

Montana continues to be a special place. I think it is somewhat difficult to share her as our open spaces and recreation areas become more crowded. While tourism is a clean industry (and all resource-based industries have a very difficult time making it here) we would be wise to study its affects and decide ahead of time where the limit is on the amount of people we want to manage.

We do very little to encourage visitation by not keeping up good highways. We do not employ proper speed limits - we seem to be stuck on this night time entrapment garbage! Let's try 75 mph on freeways, 65 mph on primary roads, and 55 mph on secondary, etc., day or night. Then people will know where they stand (especially tourists). Trucks should move along with traffic and not become a roadblock. Construction on roads and highways shows lack of planning or not willing to change the plan when it is obvious that it was a bad plan. I understand certain slow speeds when workers are there. But what about night time, weekends, and holidays? All they use these for then is to write tickets!

The Conrad area is trying to promote tourism by attempting to get grants for a minute-man missile shell to put in the park. They also are needing signs to put on the Interstate to attract tourists to exit and tour the exhibit. This may be a great area to help!

I am retired from the Dept. of Highways. I own a small hay farm and winter-pastures horses. I make and sell artistic wood bowls. I do not like our state government catering to outfitters or their lack of consideration of the resident sportsman.

We need something to improve the economy of Eastern Montana. I mean east of Great Falls to the North Dakota border. Every news, TV, and paper caters to the western part of the state.

More effort should be expended in developing the recreational value of the Fort Peck Reservoir.

I travel all over the US in my motorhome and the only complaint I hear about Montana from tourists is the lack of rest areas.

Too much of the bed-tax money is used to promote ski areas; we want more development of our historic sites. We also want our tour guide to be updated, errors corrected, and more graphics. It has looked the same every year and lacks a professional touch.

I was raised in Branson, Missouri. Tourism was its livelihood. Now it is overcrowded and a terrible place to live. Tourism should be very well managed in a state!

Although I answered the questions of the bed tax, I am strongly against it. If I lived out of state and was planning a visit to Yellowstone Park, I would route myself away from states that have a bed tax. If this was impossible, I would plan to visit someplace else.

I hope you place more emphasis on the opinion of native Montanans. I think they should have a greater say than out-of-staters like myself. Natives have a lot more invested and more at stake than some "native wannabee" that sold their home in Chicago or New York to move "west".

I am thinking of preparing a "road show" on service and hospitality for training of front-line people. Is there a need in your estimation? We see one in Great Falls (I was a speaker in the old Superhost program). I'd like to participate in a program to make the first rest area at all border crossing exceptional like Mississippi's. Montana's are the worst. We could increase the stays of visitors I believe with this investment of "first impression".

If the bed tax is now spent on only the items indicated, perhaps some should be allocated to roads that the tourists use.

Tourism is a wonderful opportunity for communities, if they are prepared for and take advantage of it. Tourists must understand and appreciate what they see and experience in Montana. We must provide interpretive information and learning activities.