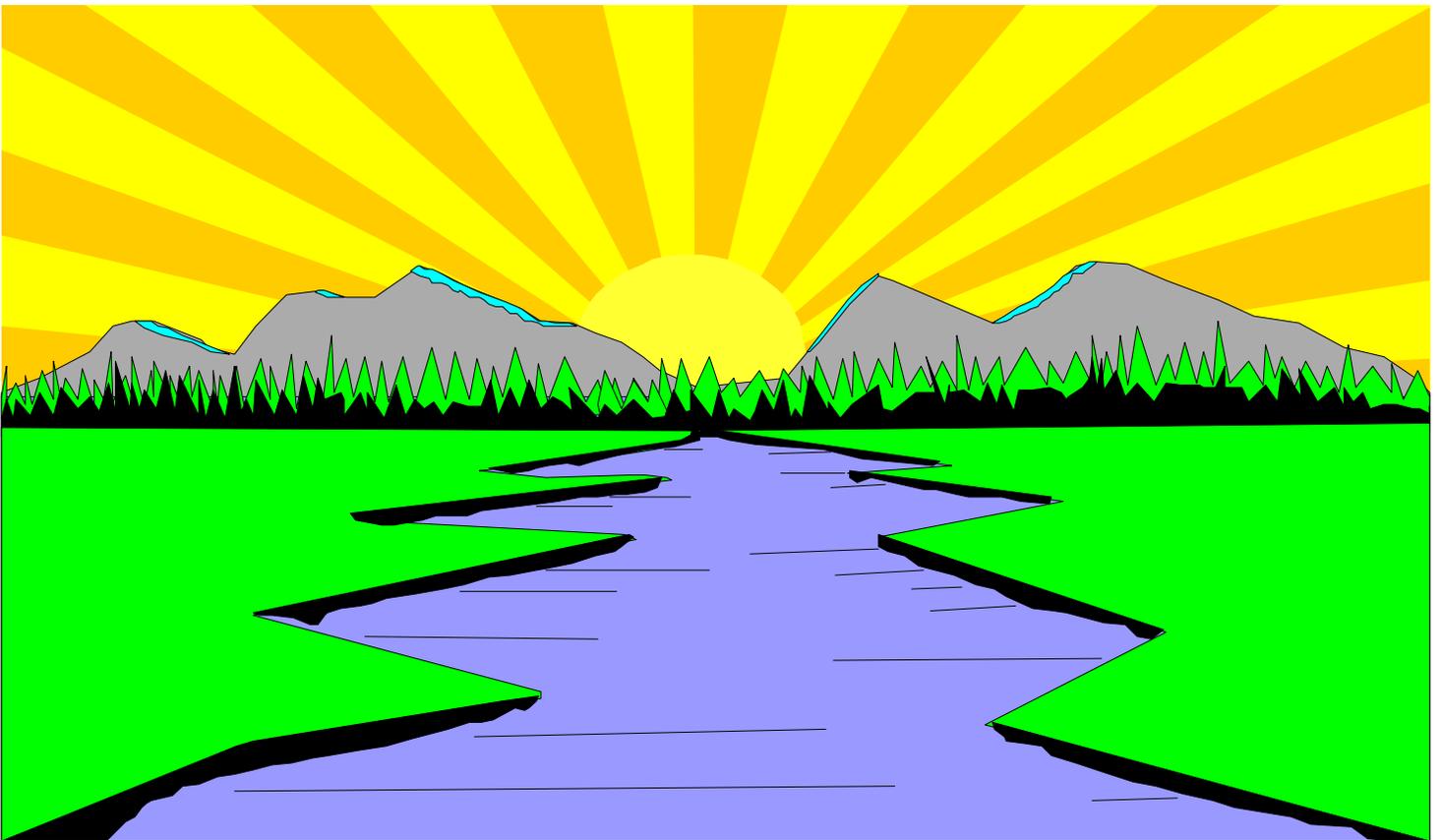


Tourism and the Montana Resident



Research Report 64

February 1999

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Authors: Kim McMahon, Norma Nickerson, and Al Ellard

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EXECUTIVE SUMMARY

This report presents Montana residents' opinions and attitudes about tourism in Montana and in their county. A mail-back questionnaire was administered to a randomly selected sample of 1000 residents of Montana during October and November, 1998. The initial mailing was followed one week later by a reminder postcard and two weeks after that by a replacement questionnaire to those residents who had not yet responded.

RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:

- Over half of the respondents were native-born Montanans who had lived in the state nearly three-fourths of their lives.
- The largest portion of residents live in communities with populations of 20,000 or more.
- Professionals and retirees were the most prominent groups responding.
- Tourism/recreation ranked fifth behind retail and wholesale trade, agriculture/agribusiness, services, and manufacturing as providing the best opportunity for future economic development in Montana.
- The majority of Montanans feel their jobs are not at all dependent on tourism.
- While contact with tourists is infrequent, residents generally try to make them feel welcome.
- Residents feel strongly that they should be involved in tourism planning.
- Most residents perceive that their community is growing, but it is difficult to ascertain whether the growth is too fast or occurring at about the right rate.
- Residents support tourism development, but don't feel they will personally benefit from increased tourism and worry that tourism will damage the quality of life in their community.
- Most residents would support land-use regulations to help control growth in their area.
- Residents generally feel there is adequate undeveloped open space in their area, but are concerned about its potential disappearance.
- Economic benefits are perceived to be the top advantage of increased tourism, but wear and tear on roads, overcrowding at attractions, increasing prices, and abuse of land are the perceived disadvantages.
- "Other" uses, State Park maintenance, and managing fish and wildlife resources received the top three priority ratings for Bed Tax spending.

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INTRODUCTION: THE MONTANA RESIDENT OPINION STUDY

This report is intended to provide a comprehensive profile of resident attitudes toward tourism in Montana. The statewide survey was administered in conjunction with the 1998 Community Tourism Assessment Process (CTAP), which is conducted in three communities each year. The statewide portion of the assessment process is used to compare individual community attitudes with those of statewide residents, as well as for monitoring resident attitudes over time. This report describes Montana resident attitudes toward tourism and was published, in part, along with county/community results for Beaverhead County, Big Horn County, and Anaconda/Deer Lodge County.

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

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



SECTION I: THE MONTANA RESIDENT OPINION STUDY

METHODOLOGY

A mail-back questionnaire was administered to a randomly selected 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.

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.

However, to make the sample representative of the population, age comparisons were made between the census¹ and the sample. 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 Montana.

Table 1 summarizes sample sizes and response rates for the Resident Opinion Study.

Table 1: Sample Size and Response Rate for the Survey Sample used in this Report

	Montana
Resident questionnaires mailed:	1000
Undeliverables:	100
Resident questionnaires returned:	364
Resident Opinion Study response rate:	40%
Female/male response ratio	40:60

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

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

¹ U.S. Bureau of Census, Population Division. Derived from data set released as PE-64, "Estimates of the Population of Counties by Age, Sex, Race, and Hispanic Origin: 1990 to 1997".

RESULTS

This section provides results of the statewide 1998 Resident Opinion Study. Presented figures represent the 364 resident households whom responded.

RESPONDENT CHARACTERISTICS

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

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 2).

Table 2: Respondents Age Characteristics

	Montanans
Percent Male	60%
Percent Female	40%
Minimum Age	23 years
Maximum Age	89 years
Average Age	48 years

Over half (58%) of survey respondents were native-born Montanans who had lived in the state an average of 73 percent of their lives. Nearly half (45%) of respondents indicated they lived in a town over 20,000 population. Respondents from rural areas made up 26 percent of study participants. On average, respondents had lived in the State of Montana for 35 years (Table 3). Respondents' average length of residence in their county was 24 years. Seventeen percent of respondents had lived in their county longer than 40 years, while 31 percent had lived in their county less than 10 years (Table 4).

Table 3: Respondents' State Residency Characteristics

State Residency:	Montanans
Born in Montana	58%
Mean years lived in Montana	35 years
Community of 20,000 or more	45%
Community of less than 20,000	28%
Rural area	26%
Percentage of life spent in Montana	73%

Table 4: Respondents' County Residency Characteristics

County Residency:	Montanans
Less than 10 years	31%
11 to 20 years	21%
21 to 30 years	14%
31 to 40 years	17%
41 to 50 years	8%
51 to 60 years	3%
61 and Over	6%
Mean years spent in county	24 years
Percentage of life spent in Montana	50%

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 what they believed offered the best opportunity for future economic growth for their community/county.

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 5). Tourism ranked fifth behind retail & wholesale trade, agriculture/agribusiness, services, and manufacturing, as offering the best opportunity for economic development (Table 6).

Table 5: Role of Tourism in County Economy

Montanans	
A minor role	33%
A role equal to other industries	56%
A dominant role	11%

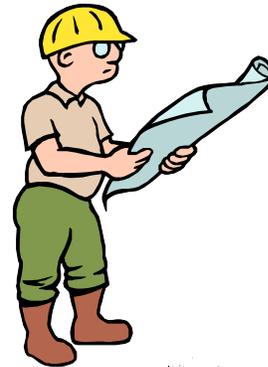


Table 6: Best Opportunity for Economic Development

Industry	Montanans	
	Rank	Mean*
Retail & wholesale trade	1	2.97
Agriculture/Agribusiness	2	3.25
Services (health, business, etc)	3	3.42
Manufacturing	4	3.74
Tourism/recreation	5	3.88
Wood products	6	4.83
Mining	7	5.52

Residents ranked tourism fifth in importance for offering the best potential for future economic development.

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



Employment and Job Dependence on Tourism

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 (22%). No other employment category was represented by more than 7 percent of the respondents (Table 7).

Table 7: Employment Status of Resident Respondents

Employment Status:	Montanans
Unemployed	1%
Retired	22%
Student	2%
Homemaker	2%
Laborers	7%
Farmer/Rancher	3%
Farm/Ranch Laborer	<1%
Clerical	5%
Armed Forces	1%
Service Worker	5%
Professional	27%
Educator	6%
Manager/Self Employed	7%
Sales	7%
Craftsman	4%

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

Three percent of respondents indicated that their job was very dependent on tourism, while three-fourths of all statewide respondents indicated that their job was not at all dependent on tourism (Table 8).

Table 8: Job Dependency on Tourism

Dependence	Montanans
Very dependent	3%
Somewhat dependent	22%
Not at all dependent	75%

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

Interactions with Tourists

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

When asked about the frequency of their day-to-day interaction with tourists, 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 9). Seven percent of respondents made an effort to avoid tourists in their community, while 59 percent made an effort to make visitors feel welcome (Table 10)

Table 9: Interactions with Tourists

Frequency of Interactions	Montanans
Regular	10%
Somewhat Frequent	31%
Infrequent	43%
Almost Never	16%

Table 10: Resident Behavior Toward Tourists

Behavior	Montanans
Make them feel welcome	59%
No specific reaction	34%
Try to avoid them	7%

Community Attachment and Change

One measure of community attachment is the length of time and percentage of life spent in a community or area. Length of residence was reported earlier in this report in Tables 3 and 4. Another measure of community attachment is based on opinions which residents hold about their community (Table 11). Respondents 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 while a response of less than 2.5 indicates disagreement. Finally, Table 12 presents the degree to which respondents felt their community was growing and at what rate.

The average age of statewide respondents was 48 years. On average, these respondents have lived in Montana 35 years (or 73 percent of their lives) and in their county 24 years (or 50 percent of their lives) (Table 3). In general, the higher percent of life one lives in a community, the more attached one is to that community.

As with respondents' length of residency, the Index of Community Attachment (i.e., the mean of the four community attachment statements) in Table 11 indicates that Montanans were quite attached to their community. An average rating of 3.16 (on a scale from 1 to 4) shows that residents like where they live. Respondents were very positive in their feelings about their community except in regard to their opinions about its future. This item had the lowest average score of the four items making up the community attachment index (Table 11).

Residents were asked whether they perceived the population of their community/county to be changing and, if so, at what rate. Seventy-one percent of respondents felt the population of their county was growing. Eleven percent reported that it was decreasing (Table 12). Of those who

felt the population was changing, nearly 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 felt their community was growing too fast. However, Montana residents are a little uncertain about the future of their community/county.

Table 11: Community Attachment Statements

Statement:	Montanans: Mean*
It is important that the residents of my community be involved in decisions about tourism	3.43
If I had to move away from my community, I would be very sorry to leave	3.34
I'd rather live in my community than anywhere else	3.08
I think the future of my community looks bright	2.79
Index of Community Attachment	3.16

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

Involve citizens in all aspects of the tourism planning process.

Table 12: Perceptions of Community Growth

Growth Characteristics:	Montanans
How is the population changing in your community?	
Growing	71%
Decreasing	11%
Not changing	18%
If changing, is your community changing..	
Too fast?	49%
About right?	46%
Too slow?	5%

Montanans believe their community is growing, but are about equally divided as to whether it is growing at the right pace or too fast.

The Quality of Community Life

When evaluating the potential for community 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. The perceived influence of tourism on quality of life factors will influence residents' support for tourism

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

Residents felt tourism has a positive influence on the good condition of our museums and cultural centers. While job opportunities are perceived to be in poor condition, the largest group of respondents felt that tourism has a positive influence on the availability of jobs. In contrast, the cost of living, condition of roads and highways, and traffic congestion are perceived to be in poor condition, but tourism is perceived to have a largely negative influence on these factors. However, residents felt that parks and recreation are in good condition and that tourism has a positive influence on that condition (Table 13).



Table 13: Present Condition and Tourism's Influence on Quality of Life Factors

Responses		Responses	
<u>Emergency Services</u>		<u>Condition of Roads and Highways</u>	
<i>Present Condition</i>		<i>Present Condition</i>	
Good	82%	Good	29%
Poor	14%	Poor	60%
<i>Tourism's Influence</i>		<i>Tourism's Influence</i>	
No influence	39%	No influence	12%
Negative influence	14%	Negative influence	40%
Positive influence	11%	Positive influence	12%
Both positive & negative inf.	22%	Both positive & negative inf.	30%
<u>Museums and Cultural Centers</u>		<u>Infrastructure</u>	
<i>Present Condition</i>		<i>Present Condition</i>	
Good	65%	Good	54%
Poor	30%	Poor	40%
<i>Tourism's Influence</i>		<i>Tourism's Influence</i>	
No influence	9%	No influence	38%
Negative influence	2%	Negative influence	21%
Positive influence	64%	Positive influence	6%
Both positive & negative inf.	16%	Both positive & negative inf.	22%
<u>Job Opportunities</u>		<u>Traffic Congestion</u>	
<i>Present Condition</i>		<i>Present Condition</i>	
Good	20%	Good	43%
Poor	78%	Poor	56%
<i>Tourism's Influence</i>		<i>Tourism's Influence</i>	
No influence	19%	No influence	11%
Negative influence	12%	Negative influence	58%
Positive influence	33%	Positive influence	7%
Both positive & negative inf.	29%	Both positive & negative inf.	20%
<u>Educational System</u>		<u>Overall Community Livability</u>	
<i>Present Condition</i>		<i>Present Condition</i>	
Good	68%	Good	84%
Poor	29%	Poor	15%
<i>Tourism's Influence</i>		<i>Tourism's Influence</i>	
No influence	52%	No influence	22%
Negative influence	9%	Negative influence	18%
Positive influence	10%	Positive influence	11%
Both positive & negative inf.	18%	Both positive & negative inf.	41%
<u>Cost of Living</u>		<u>Parks and Recreation</u>	
<i>Present Condition</i>		<i>Present Condition</i>	
Good	39%	Good	80%
Poor	58%	Poor	18%
<i>Tourism's Influence</i>		<i>Tourism's Influence</i>	
No influence	18%	No influence	11%
Negative influence	32%	Negative influence	13%
Positive influence	9%	Positive influence	31%
Both positive & negative inf.	32%	Both positive & negative inf.	40%
<u>Safety from Crime</u>		<u>Overall Cleanliness & Appearance</u>	
<i>Present Condition</i>		<i>Present Condition</i>	
Good	66%	Good	73%
Poor	32%	Poor	26%
<i>Tourism's Influence</i>		<i>Tourism's Influence</i>	
No influence	23%	No influence	11%
Negative influence	32%	Negative influence	23%
Positive influence	4%	Positive influence	21%
Both positive & negative inf.	30%	Both positive & negative inf.	39%

* Responses of "Don't Know" are excluded, so percent total in each "Condition" and "Influence" category do not equal 100%.

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 higher than 2.5 indicates a positive opinion, a score less than 2.5 indicates a negative opinion.

Support for Tourism Development

Some questions addressed general support for tourism development while others addressed more specific aspects of tourism. Table 14 presents responses to statements related to support for tourism development along with an average response for each item. A 4-point scale was used for responses.

Over two-thirds of respondents believe that their community/county is 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 community/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 14: Support for Tourism Development

Statement:

	Strongly Agree %	Agree %	Disagree %	Strongly Disagree %	Average Score*
I support continued tourism promotion and advertising to out-of-state visitors by the State of Montana	30%	52%	11%	7%	3.05
Tourism promotion by Montana benefits my county economically	23	62	12	3	3.04
The overall benefits of tourism outweigh the negative impacts	14	62	17	7	2.83
My community/county is an attractive place to invest in new tourism development	21	47	26	6	2.83
Increased tourism would help my county grow in the right direction	19	45	26	10	2.74
If tourism increases in Montana, the overall quality of life for Montana residents will improve	6	46	37	11	2.47
I will benefit financially if tourism increases in my county	8	23	43	25	2.15

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

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



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.

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 15).

Table 15: 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.	24%	54%	16%	6%	2.97
Vacationing in Montana influences too many people to move to Montana	21	31	42	6	2.67
In recent years, the state is becoming overcrowded because of more tourists	14	25	51	10	2.43

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

While many perceive Montanans to exhibit little tolerance for government control, this is not true when it comes to protecting their "turf". Residents in Montana highly favor land-use regulations to control growth.

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.

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 16).

Table 16: Land Use Issues

Statement:	Strongly Agree %	Agree %	Disagree %	Strongly Disagree %	Average Score*
There is adequate undeveloped open space in my community/county.	18%	52%	17%	13%	2.77
I am concerned about the potential disappearance of open space in my community/county.	31	37	28	4	2.95
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	10	27	54	10	2.37

While residents think there is adequate open space, they are concerned that the open space will disappear. Thirty-seven percent believe their access has been limited because of out-of-state visitors.

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

Tourism Related Decision Making

Residents have strong feelings about participating in decisions 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. Again, a 4-point scale was used.

Respondents feel strongly that residents be involved in decision making about local tourism development. Ninety-five percent of respondents agreed with the statement "it is important that residents of my community be involved in decisions about tourism". Sixty-one percent of respondents disagreed with the statement "decisions about how much tourism there should be in my community/county are best left to the private sector" (Table 17).

Table 17: 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.	49%	46%	5%	<1%	3.43
Decisions about how much tourism there should be in my community/county are best left to the private sector.	12	28	44	17	2.34

Residents feel strongly that they should be involved in decision making related to tourism development.

* 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 themes for comparison. Table 18 lists the top advantages and Table 19 lists the top disadvantages of increased tourism. Appendix A contains a list of all responses.

The top advantages by all respondents were overall economic benefits, i.e. dollars, jobs, profit, etc. Over 80 percent of Montanas indicated employment, jobs, and profits for local businesses as the top advantages (Table 18). Wear and tear on roads/infrastructure stress and overcrowding at attractions lead the disadvantages cited by statewide respondents (Table 19).

Table 18: The Top Advantage of Increased Tourism in the Community*

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

The primary perceived advantage to increased tourism is \$\$\$.

* Represents responses by 308 respondents.

Table 19: The Top Disadvantage of Increased Tourism in the Community

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

In planning for tourism, these top four concerns should be addressed:

- 1. Road congestion & maintenance.**
- 2. Overcrowding.**
- 3. Cost of living.**
- 4. Abuse of land.**

* Represents responses by 342 respondents.

RESIDENTS' OPINIONS ABOUT THE STATEWIDE "BED TAX"

Interest in Examining the Bed Tax

During the summer of 1998, the Bed Tax Futures Committee appointed by the Tourism Advisory Council held four meetings around the state to examine the bed tax and its allocation structure. Given the interest in examining the bed tax, it seemed that further exploration of residents' opinions toward the use of the bed tax would be valuable. Therefore, the Institute for Tourism and Recreation Research (ITRR) included questions about the bed tax in its annual Resident Opinion Study.

The Questions

Respondents were asked about their familiarity with the bed tax prior to reading a description of it in the survey. Nearly two-thirds (61%) of the respondents to the statewide Resident Opinion Study indicated they were aware but not well informed of the bed tax, and another 32 percent indicated they were very well informed.

The survey provided this brief description of the bed tax:

Montana currently collects a 4% tax on overnight accommodations (i.e. hotels, motels, resort, private campgrounds). This tax is popularly called the "Bed Tax" and generates revenue to support the tourism industry. Bed Tax funds are currently spent for tourism promotion, state parks, research, historical signs, and partial purchase of Virginia City/Nevada City.

The survey then asked respondents to rate 13 items on a priority scale of 1-7 for bed tax funding. The 13 items were derived from the current allocation structure and suggestions brought forward by various individuals and entities during the Bed Tax Future Committee's public hearings. After each item was checked, the respondent listed the three highest priorities for bed tax spending in Montana. Note that residents were asked to put items in a *priority* order, and were not asked to indicate how much funding should be allocated to each individual item.

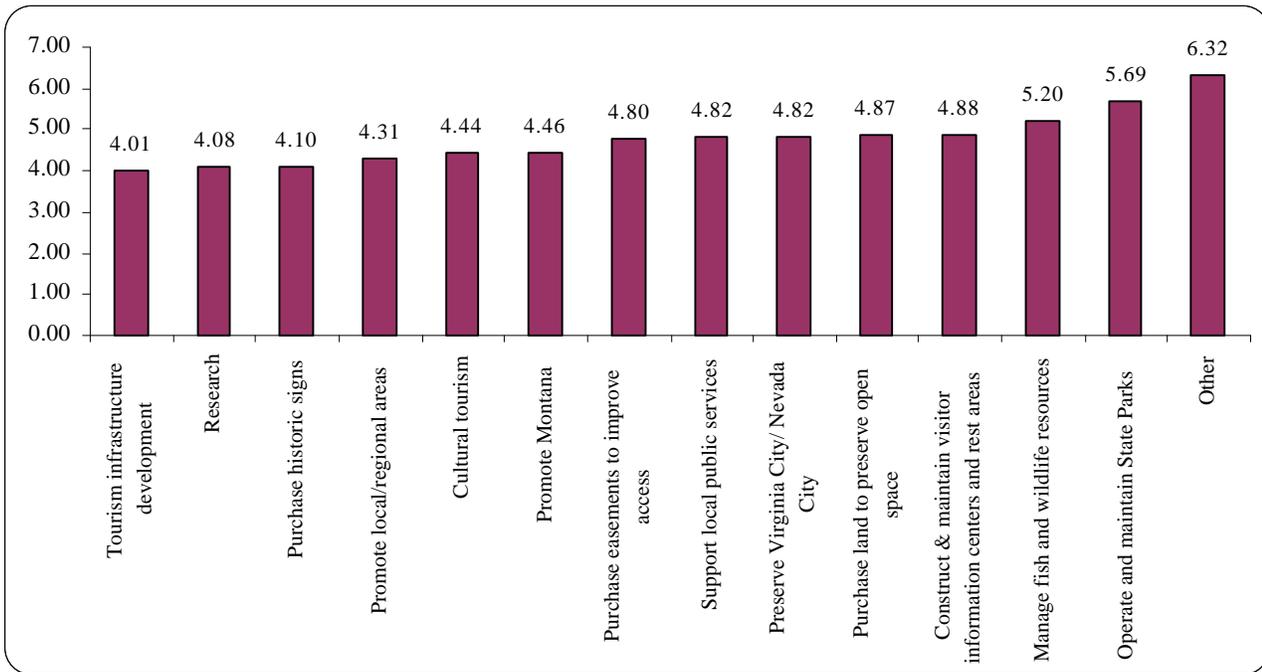
Resident Opinions about the Bed Tax

People generally thought that operating and maintaining State Parks and managing fish and wildlife resources were quite important. Chart 1 shows the mean responses for the individual items on the bed tax list.²

Chart 2 illustrates the portion of times each item was listed as one of the top three priorities. This chart is easier to understand when the items are categorized into similar components. Table 20 places the percentages into five major categories: Environmental Protection, Infrastructure, Promotion, Cultural/Heritage Tourism, and Miscellaneous.

² Items listed as "other" priorities were also very important. Supporting highways and infrastructure (42% of "other" responses) topped off the "other" list, while compensating for or paying property taxes (18% of "other" responses), and improving or adding new facilities/maintaining attractions in camping and recreation areas (9% of "other" responses) rounded out the top three "other" priorities. Community improvements, supporting sportsman opportunities, bringing industry into Montana, interpretive signs, improved disabled access, hunting & fishing promotion and funding, and reducing resident State Park fees were also mentioned as "other" priorities for bed tax funds.

Chart 1: Mean Scores: Residents' Priority Ratings for Bed Tax Funds



7 = high priority, 1 = low priority, 4 = middle priority

Chart 2: Percent of time items were indicated as one of the top three priorities for Bed Tax spending

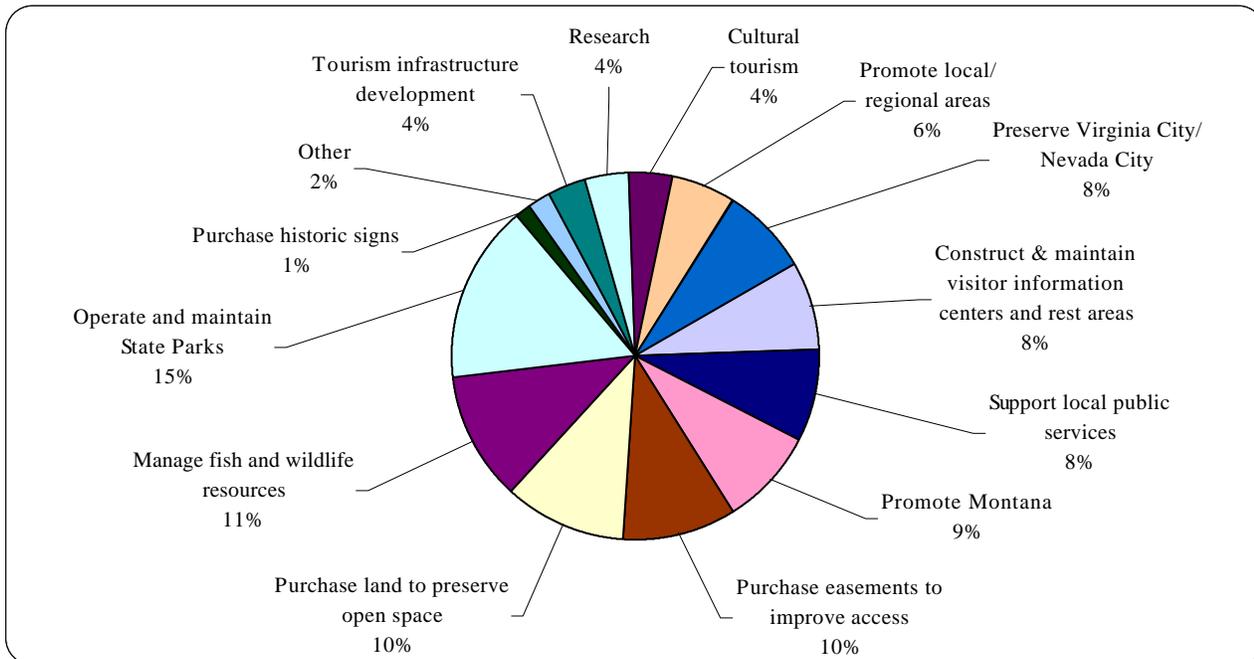


Table 20: Percent of time items indicated as one of the top three priorities by category

Environmental Protection	47.9%	Infrastructure	19.4%
Purchase Easements for Access	10.1%	Tourism Infrastructure	3.5%
Purchase Open Space	10.5%	Support Local Public Services	8.1%
Manage Fish & Wildlife Resources	11.6%	Construct and Maintain VICs & Rest Areas	7.8%
Operate and Maintain State Parks	15.7%		
Promotion	14.0%	Cultural/Heritage Tourism	13.0%
Promote Montana	8.5%	Preserve Virginia/Nevada City	7.8%
Promote Local/Regional Areas	5.5%	Historical Signage	1.3%
		Cultural Tourism	3.9%
Miscellaneous	5.7%		
Research	3.7%		
Other	2.0%	TOTAL	100%

GENERAL COMMENTS

Respondents were given an opportunity and space at the end of the survey form to include their own thoughts and comments. About fifty Montana residents took the time to provide additional comments related to this subject. Table 21 below includes the most commonly occurring themes among the comments. For a full list of individual statewide comments, see Appendix A.

Table 21: General Comments

	Montanans
Need a sales tax/resort tax	17%
Montana has been or will be damaged by outside influences	10%
Don't need minimum wage jobs	10%
Support increased tourism/good economic boost	7%
Tourism industry doesn't maintain quality of life	6%
Don't support tourism-based economy/increased tourism	5%
Tourism must be well managed/planned	2%
Need more industries/balance among industries/protect mining, logging, etc.	1%
Need improved/more rest areas	1%

* Represents comments made by 49 respondents.

SECTION II: RESIDENT ATTITUDE BY COMMUNITY SIZE

Further analysis was conducted to determine if resident attitudes toward tourism differed depending on where the respondent lived. Respondents were divided into those who live in communities greater than 20,000 population, towns under 20,000 population, or those residing in rural areas. Forty-five percent of the respondents lived in cities over 20,000, which differs from the July 1, 1996, census³, which indicated that 33 percent of Montana's population live in the larger communities. Therefore, the study sample was examined to determine if differences exist based on community size.

To ease reading, this section only highlights the elements which exhibit differences in responses depending on community size. All other variables did not show any discernable differences, and therefore are not presented. The following summary provides discussion on attitudinal differences.

For the purpose of this discussion, *city* refers to communities greater than 20,000, *town* refers to communities under 20,000, and *rural* refers to those people living outside of any community.

Respondent Demographics by Community Size

Respondents from rural areas were less likely to be native-born Montanans than respondents from either cities or towns. Respondents residing in towns were the most likely to be born in Montana (Table 23).

Table 23: Respondent Demographics by Community Size*

	Rural	Town	City
Born in Montana	51%	67%	57%
Mean years lived in County	19 years	29 years	25 years
Mean years lived in Montana	31 years	38 years	36 years
Employment Status	34% Professional 21% Retired 10% Farmer/Rancher 8% Service	23% Retired 19% Professional 12% Managerial 9% Laborer	28% Professional 23% Retired 11% Sales 7% Education

*City = 20,000+ population, Town = < 20,000 population, Rural = outside of any community

³ Population Estimates Program, Population Division, U.S. Bureau of the Census, Washington, DC. Compiled by Census and Economic Information Center, Montana Department of Commerce. www.com.state.mt.us/ceic/demog/estimate/pop/city/est96c&p.htm accessed 2/5/99.

Quality of Life by Community Size

Perceptions of the quality of life and tourism's influence on the quality of life are valuable pieces of information when examining support for tourism development in any community.

Respondent ratings of present conditions and tourism's influence on particular aspects of quality of life show that while respondents generally agree, there are some notable differences (Table 24).

Residents from rural areas tended to be slightly more negative than town and city dwellers about the present condition of overall community livability. The respondents also consider tourism's influence on overall livability to be decidedly more negative than respondents living in cities or towns.

Those residing in towns were about equally split on whether the present cost of living was good or poor, while residents in rural areas and cities were a bit more divided on the issue of current living costs. The largest portion of residents from rural areas indicated that tourism negatively influences the cost of living. City dwellers recognized that, to the largest extent, tourism has both a positive and negative influence on the cost of living.

Respondents living in towns and cities very much felt that the present condition of museums and cultural centers is good, but rural residents were more negative toward in this respect. Rural residents also felt strongly that tourism has no influence on museums and cultural centers. However, city dwellers indicated to the greatest extent that tourism has a positive influence on museums and cultural centers.

Overall, residents in towns rated the present condition of traffic congestion to be good. However, many of these respondents believe tourism has no influence on traffic or that tourism has both positive and negative influences on traffic. This was quite different from respondents in cities and rural areas, who indicated the present condition of traffic congestion was poor and tourism has a negative influence on traffic.



Table 24: Present Condition and Tourism's Influence on Quality of Life Factors by Community Size*

	Rural	Town	City
<u>Overall Community Livability</u>			
<i>Present Condition</i>			
Good	79%	85%	85%
Poor	19%	14%	14%
Don't Know	3%	1%	1%
<i>Tourism's Influence</i>			
No influence	22%	25%	20%
Negative influence	26%	19%	13%
Positive influence	8%	12%	11%
Both positive & negative influence	36%	36%	47%
<u>Cost of Living</u>			
<i>Present Condition</i>			
Good	38%	48%	35%
Poor	59%	51%	63%
Don't Know	3%	2%	2%
<i>Tourism's Influence</i>			
No influence	22%	20%	15%
Negative influence	34%	29%	32%
Positive influence	9%	13%	7%
Both positive & negative influence	27%	30%	37%
<u>Museums & Cultural Centers</u>			
<i>Present Condition</i>			
Good	49%	60%	77%
Poor	42%	37%	20%
Don't Know	9%	4%	3%
<i>Tourism's Influence</i>			
No influence	17%	10%	3%
Negative influence	2%	2%	2%
Positive influence	52%	60%	73%
Both positive & negative influence	16%	19%	13%
<u>Traffic Congestion</u>			
<i>Present Condition</i>			
Good	45%	62%	28%
Poor	54%	38%	70%
Don't Know	3%	--	1%
<i>Tourism's Influence</i>			
No influence	13%	20%	3%
Negative influence	58%	47%	65%
Positive influence	8%	7%	6%
Both positive & negative influence	15%	23%	21%

*City = 20,000+ population, Town = < 20,000 population, Rural = outside of any community

Community Livability

All residents rated their community livability as good although rural dwellers were less likely to do so. More rural residents believe that tourism has a negative influence on livability than other residents. However, nearly half of all city dwellers said tourism's influence on livability was both positive and negative.

Cost of Living

Town dwellers are more likely than other residents to rate their cost of living as good and are less likely to feel tourism has a negative influence on their cost of living.

Museums & Cultural Centers

City dwellers believe their museums and cultural centers are in good condition and strongly believe that tourism has a positive influence on them. In contrast, rural residents had the highest percent who rated their museums/cultural centers as poor.

Traffic Congestion

City dwellers were strong in their belief that traffic congestion is poor and believe that tourism has a negative influence on congestion. Town residents were more likely to see their traffic congestion as good and were divided as to tourism's influence – while 47% saw it as negative, this was still the smallest group who viewed it this way compared to city and rural residents.

Tourism Development and Resident Attitudes Toward Tourism by Community Size

There were some noticeable differences in support for tourism development and resident attitudes toward tourism depending on the respondents' community size. In general, residents in rural areas and cities showed slightly less support for tourism development and exhibited slightly more negative attitudes toward tourism (Table 25).

Table 25: Tourism Attitudes by Community Size*

	Rural % who agree	Town % who agree	City % who agree
Montana is becoming overcrowded because of more tourists	51%	36%	44%
Tourists do not pay their fair share for services they use	61%	50%	55%
Vacationing in Montana causes too many people to move to Montana	57%	45%	52%
The benefits of tourism outweigh the negative impacts	65%	81%	79%
I will benefit financially if tourism increases in my community	21%	38%	34%

Residents from small towns are generally more positive about tourism than those residing in rural areas or larger cities.

*City = 20,000+ population, Town = < 20,000 population, Rural = outside of any community

Interactions with Tourists by Community Size

Levels of interaction between residents and tourists affect the attitudes residents hold toward tourism. Also, behavior toward tourists often reflects an individual's attitude toward tourism. Residents from towns and cities were very similar in their day-to-day contact with tourists as well as their behavior towards them. However, rural residents have contact with tourists less frequently and are more apt to avoid tourists when encountered (Table 26).

Table 26: Reaction to Tourists by Community Size*

	Rural	Town	City
My day-to-day contact with tourists is:			
Regular	8%	11%	12%
Somewhat frequent	33%	34%	29%
Infrequent	40%	43%	44%
Almost never	20%	12%	16%
My behavior toward tourists in my community/county is:			
Make them feel welcome	50%	61%	64%
No specific reaction	39%	34%	30%
Avoid them	11%	5%	6%

Rural residents have less contact with tourists and are more likely to avoid them.

*City = 20,000+ population, Town = < 20,000 population, Rural = outside of any community

Land Use Issues by Community Size

Montana's landscape is a not only an attraction to visitors, but also a connection between residents and the state. In general, residents are concerned about the landscape (Table 27).

Table 27: Land Use Issues by Community Size*

	Rural % who agree	Town % who agree	City % who agree
I support land-use regulations to help manage future growth in my community/county	79%	72%	81%
My community/county is an attractive place to invest in new tourism development	56%	68%	75%
I am concerned about the potential disappearance of open space in my community/county	76%	65%	65%
There is adequate undeveloped open space in my community/county	66%	76%	70%
The future of my community/county looks bright	61%	60%	76%

Rural residents are the least likely to believe their county is an attractive place for tourism development and are most concerned about the disappearance of open space.

*City = 20,000+ population, Town = < 20,000 population, Rural = outside of any community

City dwellers are the most positive about the future of their community.

Economic Development

Future economic development will always be an issue to residents of Montana. However, not all residents agree on which types of industry offer the best opportunities for success. Tourism/recreation ranked third among rural residents, fourth among respondents from small towns, and fifth among city dwellers (Table 28).

Table 28: Ranking of Best Economic Development Opportunities in Community/County by Community Size*

Rank	Rural	Town	City
1	Agriculture/ Agribusiness	Agriculture/ Agribusiness	Retail/ Wholesale Trade
2	Retail/ Wholesale Trade	Retail/ Wholesale Trade	Services
3	Tourism/ Recreation	Services	Manufacturing
4	Services	Tourism/ Recreation	Agriculture/ Agribusiness
5	Manufacturing	Manufacturing	Tourism/ Recreation
6	Wood Products	Wood Products	Wood Products
7	Mining	Mining	Mining

SECTION III: IMPLICATIONS FOR MONTANA

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

Policy Implications

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

Residents suggest that the bed tax funds should be partially used to help protect the environment through operating and maintaining state parks, the purchase of easements and open space, and managing fish and wildlife resources. This funding source should not exclude the support of infrastructure maintenance and local services, supporting cultural/heritage tourism, promotion, or research.

Residents are willing to support regulations that will protect “their” land. Policy makers should be aware that the “no government intervention” attitude does not apply to land issues. Montanan’s are afraid that what they love the most will disappear, and will support the continued existence and maintenance of open space and scenic beauty.

Tourism promotion to out-of-state visitors should be continued. Residents see the value of promotion by the state.

Planning Implications

While much of the tourism industry is contained within the private sector, it has a large impact on the public. Ignoring the views of the public will create more negative feelings about the tourism industry. Involve residents, not just the private sector, in all aspects of the tourism planning process. Hold focus groups in various communities, including smaller towns off the I-90 corridor, and invite public comment on tourism development projects. Rural residents tend to be more reserved about tourism. These people need to be involved in planning for their area.

Implement planning into the future, including land-use regulations to safeguard against the disappearance of open space, to control growth and provide residents with security about the future.

Develop and maintain museums and cultural centers throughout the state, in both large and small communities as well as rural areas of Montana.

Continue to plan, build, and maintain parks and recreation areas throughout the state. Residents and nonresidents alike benefit from these types of areas.

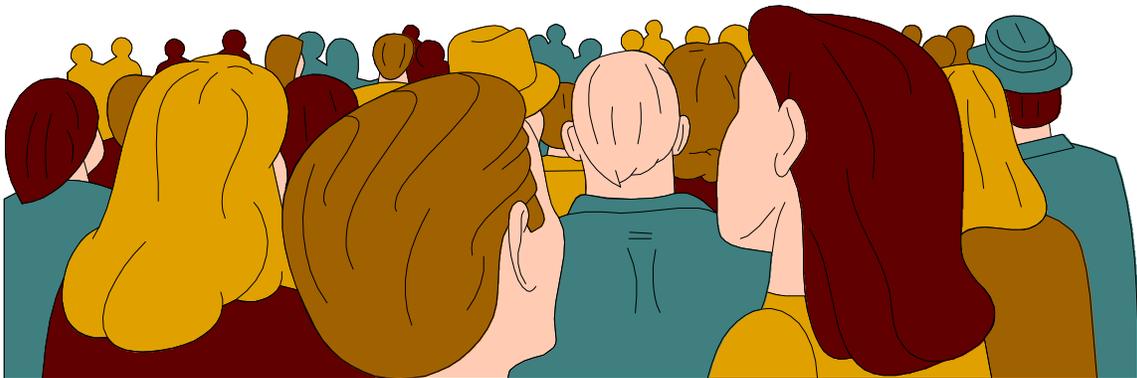
Marketing Implications

Encourage resident interaction with visitors. If residents openly welcome visitors into an area, it will foster better visitor-resident relationships and produce win-win situations.

Reinforce the positive influence tourism has on the availability of jobs and experience that comes with tourism employment.

Residents in Montana's larger cities say their traffic congestion is bad and tourism's influence on traffic is negative. This obvious correlation indicates that many of these residents feel congestion is *because* of tourists. Larger communities could conduct informal traffic analyses at busy corridors to identify the number of resident versus nonresident vehicles on given days. In addition, this analysis could include the number of people per vehicle. This would give the community an idea of where the traffic problem stems from. At that point, suggestions for solutions can be made.

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



APPENDIX A: MONTANA RESIDENT RESPONSES

"OTHER" RESPONSES

Other Economic Development Opportunities

- High-tech industries
- College
- Transportation
- Oil fields
- Construction
- Government

Other Top Disadvantages of Tourism

- No regard for "local customs" by tourists; attracts undesirable people.
- Takes away from community issues (education, etc.).
- Community/land use changes; loss of land owner rights.
- Excessive transient population/drunks.
- Resident animosity toward tourism.
- Increased sales.

Other Bed Tax Priorities

- Support highways and infrastructure.
- Clean up dilapidated properties, sidewalks and make community improvements.
- Support for sportsman opportunities.
- Improve state camping/recreation facilities; add new facilities/maintain attractions.
- Bring industry into Montana.
- Interpretive signs.
- Compensate for or pay property tax.
- Disabled access and improved services.
- Hunting and fishing promotion and funding.
- Reduce resident state park fees.

RESIDENT COMMENTS

Montana Has Been or Will Be Damaged by Outside Influences

The Californication of Montana has irreparably 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 our 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. Need 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

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.

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 50th - 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.

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 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.

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 wanabee" 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.

APPENDIX B: STATEWIDE RESIDENT ATTITUDE SURVEY

