

Valley County Explores Tourism Potential

Valley County, Montana

The 1999 Montana Community
Tourism Assessment Process

Research Report 71

January 2000

Valley County Explores Tourism Potential

Valley County, MT

The 1999 Montana Community Tourism Assessment Process

Prepared by:
Thale Dillon

Institute for Tourism and Recreation Research
School of Forestry
The University of Montana
Missoula, MT 59812
(406)243-5686
www.forestry.umt.edu/itr

Research Report 71

January 2000

Funded by the Lodging Facility use Tax

Institute for Tourism and Recreation Research
School of Forestry
The University of Montana
Missoula, MT 59812
(406)243-5686
www.forestry.umt.edu/itr

Title of Report: Valley County Explores Tourism Potential

Report Number: Research Report 71

Author: Thale Dillon

Month Published: January 2000

EXECUTIVE SUMMARY

This report presents information about tourism for Valley 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 Valley County, and to a statewide sample of 1,000 Montana residents during October and November of 1999. The initial mailing was followed up with a reminder postcard one week later. Two weeks after that, those residents who had not yet responded were sent a replacement questionnaire.

NONRESIDENT VISITORS:

- In 1998, over 3.8 million travel groups visited Montana. Of those, approximately 192,000 (5%) traveled through Valley County.
- Over \$1.5 billion was spent statewide in 1998 by nonresident travelers. This figure amounts to about \$1,730 for every Montana resident.
- In Valley County, nonresident visitors spent about \$6.6 million during 1998, or about \$802 per Valley County resident.
- Travelers to Valley County tended to stay in Montana 5 days longer than statewide visitors.
- While in Montana, visitors to Valley County reported that the best source of travel information was persons in motels, restaurants, gas stations, etc.
- Forty percent of visitors to Valley County were in Montana primarily for vacation/recreation/pleasure, and 28 percent were in Montana to visit family/friends.
- Primary attractions to Montana for travelers to Valley County were Glacier National Park, the mountains, fishing, and Yellowstone National Park.
- Visitors to Valley County spent most of their money on gas & oil, lodging, and in restaurants/bars.

RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:

- Respondents from Valley County have resided in their communities for a longer time than the statewide sample, but in the state as a whole for a shorter time than the statewide sample.
- Two-thirds of Valley County residents were native Montanans.
- Valley County respondents feel tourism should be a more prominent industry in the county's economy. They also ranked tourism high as a good opportunity for economic development.
- The majority of Valley County residents do not feel that they are economically dependent on tourism.
- Statewide residents have a stronger attachment to their community than do Valley County respondents. Both are concerned about the future of their communities.
- Eighty-one percent of Valley County residents feel that the population of their county is decreasing.
- Valley County residents feel that the quality of life in their communities can be improved by improving job opportunities and traffic congestion, and by decreasing cost of living.
- Valley County residents feel that increased tourism will have a positive impact on museums and cultural centers, job opportunities, and parks & recreation areas.
- Valley County residents are generally positive about tourism development. Although few feel that they will benefit personally from increased tourism, they agree that it will improve the quality of life for people in Montana.
- Seventy-six percent of Valley County residents would support land use regulation to control the type of future development in their community.
- Although Valley County residents think there is adequate undeveloped open space in their community, they are still concerned with its potential disappearance.
- Valley County residents feel strongly that any decisions about tourism development should involve the local residents and not be left entirely to the private sector.
- Overall economic benefit is the primary advantage of increased tourism in the Valley County area, while crowding and increased crime are seen as leading disadvantages.

CONCERNS OF VALLEY COUNTY RESIDENTS:

- Residents seem to agree that St. Marie air base, city beautification, and a visitor center should be targeted for intensive tourism development/promotion.
- The Fort Peck area, with its interpretive center and fish hatchery, topped the list of residents' own suggestions for development and promotion.
- Forty-seven percent of Valley County respondents participate in hunting activities, and 52 percent participate in fishing activities.
- Valley County respondents suggest that increased promotion of hunting and fishing activities to out-of-state visitors will influence their experience in a slightly negative way, but generally find this influence to be acceptable.

TABLE OF CONTENTS

EXECUTIVE SUMMARY	I
INTRODUCTION	1
SECTION I: THE NONRESIDENT TRAVEL STUDY	3
METHODODOLOGY	3
A PROFILE OF CURRENT VISITORS	4
<i>Group Characteristics</i>	4
<i>Information Sources</i>	6
<i>Purposes of Summer Trip</i>	8
<i>Montana Attractions</i>	9
<i>Visitor Activities</i>	11
<i>Economic Characteristics</i>	12
SECTION II: THE MONTANA RESIDENT ATTITUDE STUDY	13
METHODODOLOGY	13
RESIDENTS' OPINIONS ABOUT MONTANA, THEIR COMMUNITY, AND TOURISM	14
<i>Respondent Characteristics</i>	14
<i>Tourism and the Economy</i>	16
<i>Dependence on Tourism</i>	18
<i>Interactions with Tourists</i>	18
<i>Community Attachment and Change</i>	19
<i>Current Condition and Tourism's Influence on Quality of Community Life</i>	21
<i>Support for Tourism Development</i>	24
<i>Concerns about Increased Tourism</i>	25
<i>Concerns about Land Use Issues</i>	26
<i>Tourism Related Decision Making</i>	27
<i>Advantages and Disadvantages of Tourism Development</i>	28
<i>General Tourism Issues</i>	30
QUESTIONS SPECIFIC TO VALLEY COUNTY	31
<i>Tourism Development/Promotion Potential of Valley County Recreation Resources</i>	31
<i>Characteristics and Values of Valley County</i>	32
<i>Other Questions</i>	34
GENERAL COMMENTS	37
APPENDIX A: VALLEY COUNTY SURVEY INSTRUMENT	39
APPENDIX B: STATEWIDE COMENTS	45
APPENDIX C: VALLEY COUNTY COMMENTS AND OTHER RESPONSES	49

LIST OF TABLES

TABLE 1: SAMPLE SIZES AND RESPONSE RATES FOR SUMMER NONRESIDENT TRAVEL SURVEY SAMPLES	3
TABLE 2: CHARACTERISTICS OF SUMMER NONRESIDENT TRAVELERS VISITING MONTANA	5
TABLE 3: TOP FIVE PLACES OF ORIGIN OF MONTANA NONRESIDENT SUMMER VISITORS.....	6
TABLE 4: SOURCES OF INFORMATION USED <i>PRIOR</i> TO VISIT TO MONTANA	7
TABLE 5: <i>MOST</i> USEFUL SOURCE OF INFORMATION USED <i>PRIOR</i> TO VISIT TO MONTANA	7
TABLE 6: SOURCES OF INFORMATION USED WHILE VISITORS WERE <i>IN</i> MONTANA	8
TABLE 7: <i>MOST</i> USEFUL SOURCE OF INFORMATION USED WHILE VISITORS WERE <i>IN</i> MONTANA	8
TABLE 8: PURPOSES OF TRIP TO MONTANA BY SUMMER NONRESIDENT TRAVELERS	9
TABLE 9: ATTRACTION OF MONTANA AS A VACATION DESTINATION.....	10
TABLE 10: RECREATION ACTIVITY PARTICIPATION OF SUMMER VISITORS TO MONTANA	11
TABLE 11: VISITATION AND EXPENDITURES OF NONRESIDENT TRAVELERS IN VALLEY COUNTY.....	12
TABLE 12: SAMPLE SIZES AND RESPONSE RATES FOR THE SURVEY SAMPLES	13
TABLE 13: RESPONDENTS AGE CHARACTERISTICS	14
TABLE 14: RESPONDENTS’ RESIDENCY CHARACTERISTICS.....	15
TABLE 15: RESPONDENTS’ LENGTH OF COUNTY RESIDENCY.....	15
TABLE 16: EMPLOYMENT STATUS OF RESIDENT RESPONDENTS.....	16
TABLE 17: RESPONDENTS’ PLACE OF RESIDENCE	16
TABLE 18: ROLE OF TOURISM IN COUNTY ECONOMY	17
TABLE 19: BEST OPPORTUNITY FOR ECONOMIC DEVELOPMENT.....	17
TABLE 20: JOB DEPENDENCY ON TOURISM	18
TABLE 21: INCOME DEPENDENCY ON TOURISM	18
TABLE 22: INTERACTIONS WITH TOURISTS.....	19
TABLE 23: RESIDENT BEHAVIOR TOWARD TOURISTS	19
TABLE 24: COMMUNITY ATTACHMENT STATEMENTS	20
TABLE 25: PERCEPTIONS OF COMMUNITY GROWTH.....	21
TABLE 26: THE QUALITY OF COMMUNITY LIFE	22
TABLE 27: INFLUENCE OF TOURISM ON SELECTED QUALITY OF COMMUNITY LIFE FACTORS.....	23
TABLE 28: SUPPORT FOR TOURISM DEVELOPMENT.....	25
TABLE 29: CONCERNS ABOUT INCREASED TOURISM.....	26
TABLE 30: LAND USE ISSUES	27
TABLE 31: TOURISM-RELATED DECISION MAKING.....	28
TABLE 32: TOP ADVANTAGES OF INCREASED TOURISM IN THE COMMUNITY	28
TABLE 33: TOP DISADVANTAGES OF INCREASED TOURISM IN THE COMMUNITY	29
TABLE 34: GENERAL TOURISM ATTITUDE ISSUES.....	30
TABLE 35: TOURISM DEVELOPMENT/PROMOTION POTENTIAL OF VALLEY COUNTY RESOURCES.....	31
TABLE 36: VALLEY COUNTY ATTRACTIONS, SUGGESTIONS	32
TABLE 37: CHARACTERISTICS OF VALLEY COUNTY’S PAST.....	32
TABLE 38: CHARACTERISTICS OF VALLEY COUNTY TODAY	33
TABLE 39: PRESENT CONDITIONS NOT DESIRED FOR THE FUTURE.....	33
TABLE 40: MISSING FROM VALLEY COUNTY	34
TABLE 41: HUNTING AND FISHING PARTICIPATION	34
TABLE 42: INFLUENCE OF PROMOTION, ACCEPTABILITY OF INFLUENCE.....	35
TABLE 43: LEWIS & CLARK LEGACY	36
TABLE 44: GENERAL COMMENTS.....	37

LIST OF FIGURES

FIGURE 1: INDICATED INFLUENCE OF HUNTING/FISHING PROMOTION	35
FIGURE 2: INDICATED ACCEPTABILITY OF INFLUENCE ON HUNTING/FISHING EXPERIENCE.....	35

INTRODUCTION

This report is intended to provide a comprehensive profile of current visitors and resident attitudes about tourism in Valley County as part of the 1999 Montana Community Tourism Assessment Process (CTAP). The Community Tourism Assessment Process is facilitated by 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 pool of eligible applicants. The 1999 communities included Valley County, Carbon County, and the community of Whitehall in Jefferson County. Other Montana communities which have used the CTAP process include Choteau, Libby, Lewistown, Glendive, Fort Belknap Indian Reservation, Ravalli County, Three Forks, Glacier County, Deer Lodge, Hill County, Laurel, Livingston, and Powder River County. The initial assessment process takes approximately eight 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. 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 visitors, 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 Valley 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 Valley County visitors, a profile of visitors was developed from the subset of surveys submitted by nonresident travelers passing through the County. Both statewide and Valley County visitor profiles are provided for comparison purposes. Second, resident attitudes toward tourism were assessed using mail-back questionnaires obtained from households in Valley County during October and November of 1999. 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 visitors to Valley County and to Montana, and a comparison between resident opinions toward tourism in Valley County and Montana.

This report is presented in two sections. The first section provides visitor profiles for Valley County and Montana. The second section provides an assessment of resident attitudes toward tourism in Valley County and Montana.

SECTION I: THE NONRESIDENT TRAVEL STUDY

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

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 chartered bus or semi truck. Also excluded were those travelers who entered Montana by train. Other than these exclusions, the study attempted to assess all types of travel to the state including travel for pleasure, business, passing through 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 yielding a statewide response rate of 45 percent. A sample of 320 respondent groups traveled through Valley County in the summer of 1996 (Table 1).

Table 1: Sample Sizes and Response Rates for Summer Nonresident Travel Survey Samples Used in this Report

	Statewide	Valley County
Nonresident groups contacted:	12,941	
Usable nonresident travel questionnaires returned:	5,800	
Nonresident Travel Study response rate:	45%	
Valley County sample size of nonresident travel groups:		320
Percent of nonresident travel sample:	100%	5%

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

A PROFILE OF CURRENT VISITORS

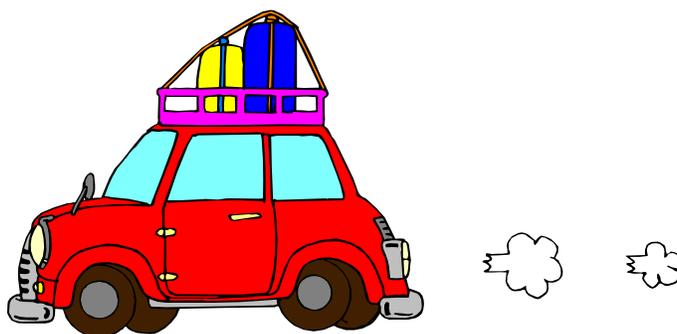
ITRR nonresident travel estimates report that approximately 2,265,000 groups, averaging 2.6 people per group, visited Montana during the 1998 summer season². It was estimated that 6 percent (or 135,900) of those groups passed through Valley County, and that 17 percent (or 22,600) of those who traveled through spent at least one night there.

Group Characteristics

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

Statewide. The average group size of 1998 Montana visitors was 2.7. 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, 4 nights.

Valley County. The average travel party size of Montana visitors who stayed overnight in Valley County was 2.8, slightly larger than for all Montana visitor groups. Eighty-two percent of overnight visitors to Valley County were repeat visitors to Montana. Summer overnight visitors were most likely to be traveling as couples (42%). Twenty-nine percent of male visitors were 30-49 years old and 19 percent were 50-64 years old. Twenty-eight percent of female visitors were 50-64 years old and 30 percent were 30-49 years old. The typical traveler who stayed overnight in Valley County spent 9 nights in the state and was most likely to stay in a motel (45%) or at a campground (public, private and undeveloped camps) (60%).



² The total number of travelers is estimated each year, while the profile of visitors is only re-evaluated every few years. Therefore, this report presents traveler characteristics that were estimated from data collected in the summer of 1996 applied to the estimated number of travelers and their total economic impacts for 1998.

Table 2: Characteristics of Summer Nonresident Travelers Visiting Montana

Characteristics:	Valley County*	Statewide
Group Type		
Couple	42%	38%
Family	29%	34%
Alone	22%	17%
Friends	3%	7%
Family & Friends	2%	3%
Business Associates	3%	1%
Group or Club	--	<1%
Group Size	2.8	2.7
Age of Males		
0-17 Years Old	18%	19%
18-29 Years Old	12%	10%
30-49 Years Old	29%	31%
50-64 Years Old	19%	24%
65+ Years Old	22%	16%
Age of Females		
0-17 Years Old	19%	18%
18-29 Years Old	6%	10%
30-49 Years Old	30%	33%
50-64 Years Old	28%	25%
65+ Years Old	17%	14%
Have visited MT before	82%	75%
Total nights spent in MT	9	4
Overnight Accommodations Used While in Montana		
Home of friend, relative %	33%	21%
Hotel, motel %	45%	59%
Private campground %	33%	18%
Public campground %	22%	16%
Undeveloped camp %	5%	4%
Resort, guest ranch %	3%	5%
Condominium %	--	1%
Other %	2%	5%

Source: ITRR

*Characteristics of Montana visitors who stayed at least one night in Valley County.

Nonresident travelers to Valley County were more likely to be traveling as couples than were statewide visitors.

Visitors to Valley County were more likely to be repeat visitors to Montana than were other visitors to Montana.

APPLICATION: Initiate a "Welcome Back" program to acknowledge non-resident visitors to the community. Use buttons, signs, etc.

Visitors to Valley County were much more likely to stay in campgrounds while in Montana than the statewide sample.

APPLICATION: This could be an opportunity for development of private campgrounds in Valley Country.

Visitors to the state as well as to Valley County represented a range of states of origin (Table 3). Visitors to Valley County were much more likely to be from Minnesota than was the sample of statewide visitors. Californians were frequent visitors in both samples, while Idahoans and Washingtonians are infrequent visitors to Valley County.

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

Rank*	Valley County**	Statewide
1	Minnesota	Washington
2	California	California
3	Texas, Wisconsin, Wyoming	Idaho
4		Wyoming
5		Colorado

Source: ITRR

* 1=highest frequency

** Characteristics of Montana visitors who stayed at least one night in Valley County.

Information Sources

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

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

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

Valley County. Forty-eight percent of overnight visitors to Valley County did not use any of the 11 sources of information *prior* to travel. However, 27 percent of visitors to Valley County used National Parks brochures, 26 percent used the Montana Travel Planner, 23 percent used travel guide books, and 21 percent used AAA (Table 4). The *most* useful source of travel information indicated by Valley County overnight visitors included the Montana Travel Planner (31%), travel guide books (21%), and AAA (19%) (Table 5).

While *in* Montana, overnight visitors to Valley County indicated that they obtained travel information from persons in motels, restaurants, gas stations, etc. (68%), brochure racks (52%), and highway information signs (45%) (Table 6). Of those information sources used while *in* Montana, Valley County overnight visitors indicated that the *most* useful sources of information while in Montana were persons in motels, restaurants, gas stations, etc. (31%), other sources (24%), persons in visitor information centers (20%), and brochure racks (15%) (Table 7).

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

Source:	Valley County	Statewide
None of the sources	48%	40%
National Park brochures	27%	20%
Montana Travel Planner	26%	13%
Travel guide book	23%	22%
AAA	21%	31%
Chamber or Visitor Bureau	11%	7%
Information from private businesses	8%	7%
State Park brochures	6%	4%
Internet travel information	5%	5%
1-800 State travel number	2%	7%
Regional travel number	2%	1%
Attend a travel trade show	2%	<1%

Source: ITRR

* Visitors could indicate more than one information source.

Visitors to Valley County are most likely to seek travel information from National Park brochures and the Montana Travel Planner. The most useful source stated is the Montana Travel Planner.

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

Source:	Valley County	Statewide
Montana Travel Planner	31%	12%
Travel guide book	21%	19%
AAA	19%	39%
National Park brochures	12%	11%
Chamber or Visitor Bureau	6%	5%
1-800 State travel number	6%	4%
Internet travel information	3%	3%
None	3%	2%
State Park brochures	--	1%
Regional travel number	--	<1%
Attend a travel trade show	--	<1%
Information from private businesses	--	6%

Source: ITRR

* Percentages may not add to 100 due to rounding.

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

Source:	Valley County	Statewide
Person in motel, restaurant, gas station, etc.	68%	36%
Brochure rack	52%	33%
Highway information signs	45%	35%
Person in visitor information center	32%	26%
Other	16%	18%
Business billboards	13%	10%
None of the sources used	11%	24%
Computer touch screen info center	--	<1%

Source: ITRR

* Visitors could choose more than one information source.

Visitors to Valley County relied heavily on local people for travel information.

APPLICATION: Invest in a program such as the "Superhost" program, educating residents about tourism and recreation opportunities in the area.

"Other sources" largely included information from friends and family.

Table 7: Most Useful Source of Information Used While Visitors Were in Montana

Source:	Valley County	Statewide
Person in motel, restaurant, gas station, etc.	31%	24%
Other	24%	18%
Person in Visitor Information Center	20%	22%
Brochure Rack	15%	15%
Highway Information Signs	9%	19%
Business Billboards	2%	2%
Computer Touch Screen Info Center	--	--

Source: ITRR

* Percentages may not add to 100 due to rounding.

Purposes of Summer Trip

Nonresident travel parties were asked 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 travel group) for traveling to Montana (Table 8).

Statewide. More than three-quarters of all sampled visitors indicated vacation/recreation/pleasure as one reason for traveling to Montana. Other popular purposes included passing through the state (31%) and visiting family/friends (31%).

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

Valley County. Eighty-two percent of all overnight visitors to Valley County indicated vacation/recreation/pleasure as one reason for their trip to Montana. Also frequently mentioned as purposes for traveling by overnight visitors to Valley County were visiting family/friends (35%), and passing through (34%).

Visitors staying overnight in Valley County most frequently cited vacation/recreation/pleasure (40%) as their *primary* reason for visiting Montana. Visiting family/friends (28%) and passing through the state (21%) were also cited as the *primary* reasons for visiting Montana by visitors staying overnight in Valley County.

Table 8: Purposes of Trip to Montana by Summer Nonresident Travelers

Travel Purpose:	Valley County*		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	82%	40%	77%	49%
Visit family/friends	35%	28%	31%	16%
Passing through	34%	21%	31%	21%
Business	6%	5%	10%	6%
Recreational shopping	5%	--	9%	1%
Necessity shopping	5%	--	4%	1%
Other	3%	2%	4%	3%
Medical	3%	3%	2%	1%
Convention/meeting	--	--	3%	2%

Source: ITRR

*Visitors could indicate more than one reason.

**Percentages may not add to 100 due to rounding.

With a large share of visitors just passing through Valley County, providing opportunities that are short in duration can give people the drive break they need and keep them in the county longer.

Marketing targeted to the large portion of visitors who are in Valley County to visit family/friends would also be beneficial.

Montana Attractions

Travelers indicating vacation as a purpose for their trip 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 the one *primary* attraction (Table 9).

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

Valley County. Overnight vacationers to Valley County were also attracted for many reasons. The top attractions to Montana for overnight vacationers to Valley County included Glacier National Park (71%), mountains (67%), rivers (49%), uncrowded areas (43%), lakes (43%), and camping (43%). The most frequently cited *primary* attractions for overnight vacationers to Valley County were Glacier National Park (40%), mountains (14%), fishing (9%) and Yellowstone National Park (7%).

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

Vacation Attraction:	Valley County		Statewide	
	Types of Attractions*	Primary Attraction**	Types of Attractions*	Primary Attraction**
Mountains	67%	14%	51%	12%
Yellowstone NP.	35%	7%	39%	22%
Rivers	49%	2%	35%	1%
Glacier NP	71%	40%	31%	25%
Open space	41%	--	31%	6%
Wildlife viewing	33%	--	28%	2%
Uncrowded areas	43%	4%	27%	4%
Lakes	43%	2%	26%	1%
Camping	43%	4%	19%	2%
Friendly people	33%	2%	18%	3%
National forest	29%	--	15%	1%
Hiking	29%	--	15%	1%
Fishing	18%	9%	14%	6%
Historic sites	31%	--	13%	2%
Montana history	33%	4%	11%	1%
Native American culture	18%	--	10%	1%
Spec. attraction	6%	2%	8%	6%
Wilderness area	16%	--	8%	1%
N Great Plains	33%	4%	6%	<1%
Badlands	24%	2%	6%	1%
State Park	10%	--	6%	<1%
Special event	14%	4%	4%	4%

Source: ITRR

* Visitors could indicate more than one attraction.

** Percentages may not add to 100 due to rounding.

While visitors to Valley County are looking for mountains and rivers, they are basically on their way to Glacier National Park.

Fishing is one important reason visitors to Valley County come to Montana.

Visitor Activities

Some differences exist among activities participated in by statewide visitors and overnight visitors to Valley County (Table 10).

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

Valley County. Camping in developed areas was the most popular recreation activity indicated by travelers who stayed overnight in Valley County (48%). Other popular activities included wildlife watching (44%), nature photography (39%), picnicking (35%), and visiting historic/interpretive sites (32%).

Table 10: Recreation Activity Participation of Summer Visitors to Montana

Recreation Activity*:	Valley County	Statewide
Camping in developed areas	48%	28%
Wildlife watching	44%	45%
Nature photography	39%	33%
Picnicking	35%	26%
Historic/Interpretive Sites	32%	29%
Visiting family/friends	29%	34%
Day hiking	27%	29%
Visiting museums	26%	21%
Nature Studies	23%	9%
Visit Native American Sites	21%	10%
Camping in primitive areas	18%	10%
Fishing	16%	15%
Recreational shopping	16%	32%
Special Events/Festivals	14%	8%
Swimming in natural areas	14%	7%
Gambling	13%	10%
Swimming in pools	11%	14%
River rafting/floating	6%	6%
Golfing	3%	5%

A large portion of visitors to Valley County come to see historic/interpretive sites. This is good news for the County for drawing Lewis & Clark visitors in the coming years.

Source: ITRR

* Visitors could indicate more than one activity.

Economic Characteristics

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

ITRR staff estimated that 3,830,000 travel groups visited Montana in 1998. Of those 3.8 million travel groups, approximately 192,000 (5%) passed through Valley County.

Statewide. Nonresident visitors spent in excess of \$1.5 billion dollars in the state during 1998. This amounted to about \$1,730 per person living in the state.

Valley County. Nonresident spending in Valley County totaled \$6,570,000 in 1998, or less than 1 percent of all nonresident spending in Montana. Nonresidents spent the equivalent of \$802 per person in the county.

Table 11: Visitation and Expenditures of Nonresident Travelers in Valley County

Distribution of Expenditures in Sample Area:	Valley County	Statewide
Hotel, Lodge, Campgrounds, RV Park, B&B	14%	17%
Auto Rental, Repair and Transportation	2%	4%
Gasoline, Oil	38%	22%
Restaurant, Bar	15%	18%
Groceries, Snacks	13%	8%
Retail Sales	10%	24%
Miscellaneous Services	8%	6%
Total Travel Groups to Sample Area in 1998	192,000	3,830,000
Total Expenditures in Sample Area in 1998 (1998\$)	\$6,570,000	\$1,519,000,000
Per Capita Expenditures in Area (1998 \$) ³	\$802	\$1,730

Source: ITRR



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

SECTION II: THE MONTANA RESIDENT ATTITUDE STUDY

Data for this section of the report came from the ITRR Resident Opinion Study conducted in Valley County during the fall of 1999.

METHODOLOGY

A mail-back questionnaire was administered to a randomly selected sample of 500 residents of Valley County, as well as to a statewide sample of 1,000 Montana residents, during October and November of 1999. One week after the initial mailing, a reminder postcard was sent to all survey households. After an additional two weeks, a replacement questionnaire was mailed to those who had not yet responded.

A non-response bias check was not conducted at the conclusion of the sampling effort. Non-response bias checks are generally conducted to determine if those in the sample population 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 non-respondents involved statements about support for tourism development. These key questions could only be answered after answering numerous other questions asked in the survey. Therefore, it was not possible to develop a condensed telephone non-response questionnaire. Because of this reason, it was decided that comparable data could not be generated from telephone non-respondent interviews.

The reader is cautioned to bear in mind that these results represent opinions from 36 percent of the Valley County residents polled (Table 12). It was assumed that respondents did not differ from non-respondents in their opinions. Because the age distribution of the survey respondents differed from the July 1, 1998, Montana census estimates of age groups⁴, responses were adjusted to more closely reflect the population of Valley County residents. Results presented reflect the adjusted data set.

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

	Valley County	Statewide
Resident questionnaires sent out:	500	1000
Undeliverables:	20	105
Resident questionnaires returned:	171	244
Resident Opinion Study response rate:	36%	27%
Female:male response ratio	51:49	56:44

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

RESIDENTS' OPINIONS ABOUT MONTANA, THEIR COMMUNITY, AND TOURISM

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

Residents of an area may hold a variety of opinions about tourism and other forms of economic development. They may have both positive and negative perceptions of the specific impacts of tourism. Attitudes and opinions are good measures for determining the level of support for community and industry actions. The resident opinion questionnaire addressed topics that provide a picture of perceived current conditions and tourism's role in the community.

Respondent Characteristics

Age and gender, as well as residence in the state and in Valley County were explored in the respondent characteristic section of the survey.

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

Statewide. Forty-four percent of respondents to the statewide survey were male. The average age of respondents to the statewide survey was 51 years with respondents ranging in age from 19 to 88 years (Table 13).

Valley County. Fifty-one percent of respondents from Valley County were female. Respondents averaged 51 years of age, and ranged in age from 22 to 95 years. (Table 13).

Table 13: Respondents Age Characteristics

Age:	Valley County	Statewide
Average Age	51 years	51 years
Percent Male	49%	44%
Percent Female	51%	56%
Minimum Age	22 years	19 years
Maximum Age	95 years	88 years

Residence: Survey subjects were asked if they were born in Montana, as well as how long they had lived in their community and in the state of Montana.

Statewide. Exactly half (50%) of survey respondents were native Montanans. On average, they had lived in their community for 21 years, and in the state for 47 years. Ninety-two percent of respondents' lives were spent in the state (Table 14). Sixteen percent of respondents had lived in their community longer than 40 years, while 35 percent had lived in their community 10 years or less (Table 15).

Valley County. Over half (67%) of Valley County respondents were native-born Montanans. On average, they had lived in the county for 33 years, or 64 percent of their lives, and in the state for 41 years, or 80 percent of their lives (Table 14). Fifty percent of Valley County residents had lived in their community longer than 30 years (Table 15).

Table 14: Respondents' Residency Characteristics

Residency:	Valley County	Statewide
Born in Montana	67%	50%
Mean years lived in the county	33 years	21 years
Mean years lived in Montana	41 years	47 years
Age (Mean Years)	51 years	51 years
Percentage of life spent in counties	64%	41%
Percentage of life spent in Montana	80%	92%

Table 15: Respondents' Length of County Residency

Residency:	Valley County	Statewide
10 years or less	16%	35%
11 to 20 years	16%	23%
21 to 30 years	18%	15%
31 to 40 years	18%	10%
41 to 50 years	11%	8%
51 to 60 years	8%	5%
61 years or more	13%	4%

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).

Statewide. Professionals made up the largest group of respondents to the statewide survey, comprising 28 percent of those responding. Retirees made up the second largest group of respondents (18%). No other employment category was represented by more than 8 percent of the respondents (Table 16).

Valley County. Professionals (23%) and retirees (22%) were the two largest employment categories among Valley County respondents, followed by the self-employed (13%). Farmers/Ranchers made up 9 percent of the respondents, almost double the portion of the statewide sample reporting to be farmers/ranchers (Table 16).

Table 16: Employment Status of Resident Respondents

Employment Status:	Valley County	Statewide
Professional	23%	28%
Retired	22%	18%
Self-employed	13%	8%
Farmer / Rancher	9%	5%
Homemaker	8%	5%
Clerical	7%	5%
Laborer	7%	5%
Managerial	4%	2%
Sales	3%	3%
Transport	2%	<1%
Service Worker	1%	5%
Unemployed/Disabled	1%	2%
Farm/Ranch Laborer	<1%	--
Operatives	<1%	<1%
Armed Services	--	--
Student	--	5%
Craftsman	--	7%

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

Statewide. Over half (54%) of respondents indicated that they lived in town. Residents from rural areas made up 46 percent of the respondents (Table 17).

Valley County. Less than one-third (30%) of respondents from Valley County indicated that they lived out of town, a number quite different from the statewide sample (Table 17).

Table 17: Respondents' Place of Residence

Where in Community:	Valley County	Statewide
In town	70%	54%
Out of town	30%	46%

Tourism and the Economy

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

Statewide. The majority of respondents (57%) believe that tourism should play a role equal to other industries in their local economy, while 26 percent think tourism should play a relatively minor role (Table 18). Tourism ranked fourth behind agriculture/agribusiness, retail & wholesale trade, and services as offering the best opportunity for economic development (Table 19).

Valley County. The majority of Valley County respondents believe that tourism should play a role equal to other industries in the community’s economy. Thirteen percent believe tourism should play a dominant role (Table 18). When asked to rank tourism along with other industry groups according to their economic importance for Valley County, tourism ranked third, along with service industries, among all industry groups (Table 19).

Table 18: Role of Tourism in County Economy

	Valley County	Statewide
No role	<1%	1%
A minor role	24%	26%
A role equal to other industries	63%	57%
A dominant role	13%	10%

Table 19: Best Opportunity for Economic Development

Industry	Valley County		Statewide	
	Rank	Mean*	Rank	Mean*
Retail & wholesale trade	2	2.96	2	3.19
Agriculture/Agribusiness	1	2.22	1	3.07
Services (health, business, etc)	3	3.10	3	3.36
Manufacturing	5	3.92	5	3.81
Tourism/recreation	3	3.10	4	3.66
Wood products	6	6.02	6	5.00
Mining	7	6.37	7	5.67

Valley County respondents are generally more supportive of the tourism industry than the State as a whole.

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



Dependence on Tourism

Several questions were designed to determine the extent to which respondents feel they are dependent upon the tourism industry. They were asked to indicate degree of dependency for both their jobs and their income.

Statewide. Nine percent of respondents indicated that their job was very dependent on tourism, while almost three-fourths of all statewide respondents indicated that their job was not at all dependent on tourism (Table 20). Less than 1 percent indicated that 76-100% of their income is dependent on tourism, while 73 percent said that none of their income is tourism-dependent (Table 21).

Valley County. Almost three-fourths (74%) of Valley County respondents believe they are not at all dependent on the tourism industry. Three-fourths of respondents (75%) indicate that none of their income is dependent on tourism. Only 5 percent of Valley County residents feel their jobs are very dependent on the tourism industry, while less than 1 percent feels that 76-100 percent of their income is attributable to tourism (Tables 20 and 21). As with the statewide respondents, the perception among Valley County residents is that they are not dependent on tourism for either employment or income. This is interesting since Valley County has a larger share of self-employed residents than does the statewide sample, suggesting there should be some difference in dependency between the two groups.

Table 20: Job Dependency on Tourism

Job Dependency	Valley County	Statewide
Very dependent	5%	9%
Somewhat dependent	21%	18%
Not at all dependent	74%	73%

Table 21: Income Dependency on Tourism

Income Dependency	Valley County	Statewide
None at all	75%	73%
1% - 25%	21%	17%
26% - 50%	2%	6%
51% - 75%	2%	3%
76% - 100%	<1%	<1%

Interactions with Tourists

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

Statewide. When asked about the frequency of their day-to-day interaction with tourists, 19 percent indicated that they had regular contact, and 29 percent reported having somewhat frequent contact with tourists. An additional 35 percent indicated that they had infrequent contact with tourists (Table 21). Only eight percent of respondents make an effort to avoid tourists in their community, while 62 percent made an effort to make visitors feel welcome (Table 22).

Valley County. Thirty-five percent of respondents indicated that they have regular or somewhat frequent contact with tourists during their day-to-day activities (Table 22). Over three-fourths of respondents (76%) try to make visitors feel welcome in the community (Table 23).

Table 22: Interactions with Tourists

Frequency of Interactions	Valley County	Statewide
Regular	10%	19%
Somewhat Frequent	25%	29%
Infrequent	45%	35%
Almost Never	20%	17%

Over one-third of Valley County residents have regular to somewhat frequent contact with visitors. They are also very likely to make them feel welcome. It seems the community would benefit from increased contact between residents and visitors.

Table 23: Resident Behavior Toward Tourists

Behavior	Valley County	Statewide
Make them feel welcome	76%	62%
No specific reaction	22%	30%
Try to avoid them	2%	8%

Community Attachment and Change

One measure of community attachment is the length of time and percentage of life spent in a community or area. Length of residence was reported earlier in the report in Table 14. Another measure of community attachment is based on opinions which residents hold about their community (Table 24).

Respondents indicated their level of agreement with each of four statements on a scale of 1 (strongly disagree) through 4 (strongly agree). A response greater than 2.5 indicates agreement. Finally, Table 25 presents the degree to which respondents felt their community was growing and at what rate.

Statewide. The Index of Community Attachment (i.e., the mean of the four community attachment statements) indicates that statewide respondents are quite attached to their community. An average rating of 3.10 (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 of the four items making up the community attachment index (Table 24).

Residents were asked whether they perceive the population of their community/county to be changing and, if so, at what rate. Statewide, 69 percent of respondents felt the population of their county is growing. Thirteen percent reported that it is decreasing. Of those who feel the population is changing, over half feel it is changing too fast, while 38 percent feel it is changing at about the right rate⁵ (Table 25).

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

Valley County. The Index of Community Attachment for Valley County (2.85) is lower than for the statewide sample, but remains positive. Like the statewide sample, Valley County responded negatively to the statement “I think the future of my community looks bright”. Not only is the score lower than the statewide sample, it is at the negative end of the scale. This may suggest that there are serious concerns about the future stability of the community. On the other hand, their responses to the remaining three statements indicate that Valley County residents rather like where they live and want to be involved in decisions regarding their community (Table 24).

Only 4 percent of respondents feel that the County population is increasing, a sentiment opposed by over three-fourths of the sample. Fifteen percent feel that the population of their community is not changing at all⁶. Regardless of how it is changing, the majority of respondents feel the population is changing too fast (Table 25).

Table 24: Community Attachment Statements

Statement:	Valley County Mean*	Statewide Mean*
It is important that the residents of my community be involved in decisions about tourism	3.47	3.36
If I had to move away from my community, I would be very sorry to leave	2.96	3.30
I'd rather live in my community than anywhere else	2.79	3.08
I think the future of my community looks bright	2.16	2.67
Index of Community Attachment	2.85	3.10

Valley County respondents have a negative perspective on the future of their community.

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

⁵ The population of the state of Montana increased by 10.2 percent between April 1990 and July 1998. Source: MT Department of Commerce, Census and Economic Information Center. Data set “Montana Estimates of the Population of Counties and Places: Annual Time Series, July 1, 1991 to July 1, 1998”. Accessed at www.com.state.mt.us/ceic

⁶ The population of Valley County decreased by 0.5 percent between April 1990 and July 1998. Ibid.

Table 25: Perceptions of Community Growth

Growth Characteristics:	Valley County	Statewide
How is the population changing in your community?		
Growing	4%	69%
Decreasing	81%	13%
Not changing	15%	18%
If changing, is your community changing. . .		
Too fast?	60%	59%
About right?	23%	38%
Too slow?	17%	3%

Valley County residents have a strong sense that the population of the county is decreasing too fast.

Current Condition and Tourism’s Influence on Quality of Community Life

When evaluating the potential for community tourism development, it is necessary to gain an understanding of residents’ opinions of the current quality of life in their community and how they perceive tourism will influence this. A number of factors contribute to the quality of life in any community, including the availability and quality of public services, infrastructure, absence of stress factors such as crime and unemployment, and overall livability issues such as cleanliness and friendliness.

To that end, respondents were asked to rate the condition of a number of factors that influence the quality of community life using a four point scale ranging from 4 (very good condition) to 1 (very poor condition), as well as "don't know". They were also asked to rate the influence tourism has on these current conditions on a scale including “positive influence”, “both positive and negative influence”, “negative influence”, “no influence”, and “don’t know”.

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

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

While it was perceived that tourism does not impact the educational system, it was considered to be in poor condition. Similarly, infrastructure was indicated to be in slightly good condition, but respondents indicated “no influence” from tourism on infrastructure (Tables 26 and 27).

Valley County. Valley County respondents indicated that emergency services, overall community livability, and safety from crime are in good to very good condition, and that tourism will provide both positive and negative influences. Parks and recreation areas are rated to be in good condition as well, and tourism is expected to have a positive influence here.

Traffic congestion and job opportunities were rated as being in poor condition. However, job opportunities are expected to be influenced positively by tourism while traffic congestion is expected to be influenced in both positive and negative ways.

As with the statewide sample, Valley County respondents rate the educational system as being in good condition, and feel that it is uninfluenced by tourism. While museums and cultural centers are rated as being in good condition, tourism is overwhelmingly expected to have a positive influence (Tables 26 and 27).

Table 26: The Quality of Community Life

How would you rate the <i>present condition</i> of . . .	Valley County Mean*	Statewide Mean*
Emergency services (police, fire, etc)	3.27	3.20
Overall community livability	3.23	3.26
Safety from Crime	3.20	3.07
Parks and recreation areas	3.03	3.09
Educational system	2.98	3.00
Museums and cultural centers	2.94	3.08
Infrastructure (water, sewer, etc.)	2.80	2.78
Over-all cleanliness and appearance	2.78	3.02
Condition of roads and highways	2.58	2.59
Cost of living	2.55	2.30
Traffic congestion	2.43	2.62
Job opportunities	1.77	2.25

Valley County respondents feel that their community has good emergency services, good overall community livability and that they are safe from crime.

Valley County respondents feel some improvement is needed in these areas.

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



Table 27: Influence of Tourism on Selected Quality of Community Life Factors

The Influence of Tourism on:		No Influence	Negative Influence	Positive & Negative	Positive Influence	Don't Know
Emergency services (police, fire, etc)	Valley County →	25%	4%	30%	23%	18%
	Statewide →	<i>28%</i>	<i>9%</i>	<i>28%</i>	<i>12%</i>	<i>23%</i>
Overall community livability		13%	8%	43%	24%	12%
		<i>25%</i>	<i>10%</i>	<i>42%</i>	<i>13%</i>	<i>10%</i>
Safety from Crime		7%	14%	42%	21%	16%
		<i>21%</i>	<i>23%</i>	<i>32%</i>	<i>9%</i>	<i>15%</i>
Parks and recreation areas		4%	8%	31%	50%	7%
		<i>10%</i>	<i>16%</i>	<i>40%</i>	<i>27%</i>	<i>7%</i>
Educational system		42%	2%	19%	21%	16%
		<i>50%</i>	<i>9%</i>	<i>19%</i>	<i>7%</i>	<i>15%</i>
Museums and cultural centers		2%	<1%	11%	80%	6%
		<i>7%</i>	<i>1%</i>	<i>16%</i>	<i>61%</i>	<i>15%</i>
Infrastructure (water, sewer, etc.)		29%	9%	28%	15%	19%
		<i>30%</i>	<i>23%</i>	<i>22%</i>	<i>7%</i>	<i>18%</i>
Overall cleanliness and appearance		5%	16%	47%	23%	9%
		<i>14%</i>	<i>17%</i>	<i>40%</i>	<i>21%</i>	<i>8%</i>
Condition of roads and highways		10%	22%	42%	21%	5%
		<i>14%</i>	<i>32%</i>	<i>35%</i>	<i>12%</i>	<i>7%</i>
Cost of living		17%	8%	34%	26%	15%
		<i>19%</i>	<i>34%</i>	<i>27%</i>	<i>8%</i>	<i>12%</i>
Traffic congestion		20%	19%	27%	24%	10%
		<i>12%</i>	<i>56%</i>	<i>17%</i>	<i>9%</i>	<i>6%</i>
Job opportunities		10%	11%	25%	42%	12%
		<i>23%</i>	<i>13%</i>	<i>28%</i>	<i>25%</i>	<i>11%</i>

○ Tourism's Positive Influence.

Valley County residents do not think that tourism has an overwhelmingly negative influence on Quality of Community Life factors.

*Valley County percentages in boldface, statewide percentages in italics.



In addition to tourism's perceived influence on wellbeing, 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. 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, and a score less than or equal to 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.

Statewide. Almost two-thirds (63%) of respondents believe that their community is an attractive place to invest in tourism development. Forty-nine percent believe that tourism would help their community grow in the "right" direction. Seventy-four percent believe that tourism promotion by Montana benefits their community. Nearly three-fourths (73%) support continued tourism promotion by Montana. Not as many residents believe that they would personally benefit if tourism increased in their community. Only 24 percent feel they would see personal financial benefit from increased tourism. Sixty-three percent of respondents believe that the benefits of tourism outweigh the negative effects. Finally, about one-third (35%) of respondents feel that increased tourism would result in increased quality of life in their community (Table 28).

Valley County. Respondents from Valley County agree that tourism promotion by the state of Montana benefits their communities economically and support continued tourism promotion by the state. Furthermore, respondents believe that the overall benefits of tourism outweigh the negative impacts. They also believe that increased tourism will help their community grow in the right direction, and that their community is an attractive place to invest in tourism development. Respondents also agree that increased tourism would improve the quality of life in Montana. Valley County respondents do not feel that they will benefit financially by increased tourism in their county (Table 28).



Table 28: Support for Tourism Development

Statement:	Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score**
Tourism promotion by Montana benefits my county economically	25%*	60%	13%	2%	3.08
Valley County →					
Statewide →	<i>12%</i>	<i>62%</i>	<i>19%</i>	<i>7%</i>	<i>2.80</i>
I support continued tourism promotion and advertising to out-of-state visitors by the State of Montana	32%	61%	6%	<1%	3.24
	<i>15%</i>	<i>58%</i>	<i>15%</i>	<i>12%</i>	<i>2.77</i>
The overall benefits of tourism outweigh the negative impacts	13%	69%	17%	<1%	2.94
	<i>8%</i>	<i>55%</i>	<i>25%</i>	<i>12%</i>	<i>2.59</i>
Increased tourism would help my county grow in the right direction	32%	58%	9%	1%	3.20
	<i>12%</i>	<i>37%</i>	<i>34%</i>	<i>17%</i>	<i>2.45</i>
If tourism increases in Montana, the overall quality of life for Montana resident will improve	9%	57%	30%	4%	2.70
	<i>5%</i>	<i>30%</i>	<i>45%</i>	<i>20%</i>	<i>2.20</i>
My county is an attractive place to invest in new tourism development	15%	65%	15%	5%	2.89
	<i>12%</i>	<i>51%</i>	<i>27%</i>	<i>10%</i>	<i>2.65</i>
I will benefit financially if tourism increases in my County	9%	22%	46%	23%	2.15
	<i>7%</i>	<i>17%</i>	<i>43%</i>	<i>33%</i>	<i>1.97</i>

*Valley 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 that will impact the quality of life they have become used to. Increased tourism brings with it a number of changes in any community. The extent to which residents see these changes as positive or negative will impact their support for tourism development. Again a 4-point scale was used for responses.

Statewide. Over three-fourths (76%) of Montanans surveyed would support land-use regulations to control future growth in their community. Over two-thirds (70%) of respondents agree that vacationing in Montana influences too many people to move here. In light of this, 56 percent feel the state is becoming too crowded by tourists (Table 29).

Valley County. Seventy-six percent of Valley County respondents would support land use regulations to help control the type of future growth in the community. The majority of county respondents do not agree that vacationing in Montana influences too many people to move to the state. Twenty-seven percent, however, do feel that the state is becoming overcrowded because of tourists (Table 29).

Table 29: 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.	13%* <i>28%</i>	63% <i>48%</i>	18% <i>16%</i>	6% <i>8%</i>	2.82 <i>2.95</i>
Vacationing in Montana influences too many people to move to Montana	2% <i>32%</i>	33% <i>38%</i>	60% <i>27%</i>	5% <i>3%</i>	2.31 <i>2.99</i>
In recent years, the state is becoming overcrowded because of more tourists	1% <i>22%</i>	26% <i>34%</i>	64% <i>36%</i>	9% <i>8%</i>	2.19 <i>2.78</i>

Valley County respondents would support land use regulations to control future growth that may result from vacationers moving to Montana.

***Valley 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. Sixty-two percent of respondents agreed that there was adequate undeveloped open space in their community. Nearly three-fourths (72%) are concerned about the potential disappearance of open space. Only 36 percent of respondents feel that their access to recreation opportunities is limited due to the presence of out-of-state visitors (Table 30).

Valley County. Close to all (90%) of Valley County respondents believe there is adequate undeveloped open space in the area, but show some concern about its potential disappearance (46%). However, respondents do not feel that the presence of tourists limits their access to recreation opportunities (71%) (Table 30).

Table 30: Land Use Issues

Statement:		Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score**
There is adequate undeveloped open space in my community/county.	Valley County →	36%*	54%	9%	1%	3.24
	Statewide →	<i>16%</i>	<i>46%</i>	<i>23%</i>	<i>15%</i>	<i>2.62</i>
I am concerned about the potential disappearance of open space in my community/county.		8%	38%	48%	6%	2.50
		<i>44%</i>	<i>28%</i>	<i>22%</i>	<i>6%</i>	<i>3.11</i>
My access to recreation opportunities is limited due to the presence of out-of-state visitors.		7%	22%	60%	11%	2.26
		<i>11%</i>	<i>25%</i>	<i>54%</i>	<i>10%</i>	<i>2.37</i>

Valley County respondents feel that there is adequate undeveloped open space, but are somewhat concerned about its potential disappearance. They do not feel that their access to recreation opportunities is limited by the presence of tourists.

*Valley 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 participating in decisions that 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 county. Again, a 4-point scale was used.

Statewide. Respondents feel strongly that residents should be involved in decision making about local tourism development. Ninety-three percent of respondents either agree or strongly agree 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 31).

Valley County. Like their statewide counterparts in this survey, Valley County residents feel strongly that decision-making about tourism development in Valley County should include input from the residents of the county (98%), and do not agree that these decisions should be left entirely to the private sector (69%) (Table 31).



Table 31: Tourism-Related Decision Making

Statement:		Strongly Agree	Agree	Disagree	Strongly Disagree	Average Score**
It is important that residents of my community be involved in decisions about tourism.	Valley County →	48%*	50%	2%	<1%	3.47
	Statewide →	<i>43%</i>	<i>50%</i>	<i>6%</i>	<i><1%</i>	<i>3.36</i>
Decisions about how much tourism there should be in my community are best left to the private sector.		6%	25%	49%	20%	2.16
		<i>13%</i>	<i>26%</i>	<i>34%</i>	<i>27%</i>	<i>2.26</i>

Include county residents in all phases of the tourism planning and decision making process.

*Valley 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 and Disadvantages of Tourism Development

To further clarify the perceived benefits and costs of tourism development, respondents were asked what they thought would be the top advantage and disadvantage of increased tourism in their community. This was an open-ended question where respondents provided their own thoughts and wording. The suggestions were then assigned to general categories for comparison. Table 32 lists the top advantages and Table 33 lists the top disadvantages of increased tourism.

Statewide. The top advantage given by statewide respondents was overall economic benefit. Over 80 percent of the statewide sample indicate more jobs, higher income and higher profits for local businesses as the top advantages (Table 32). Congestion/crowding tops the list of disadvantages, followed by tourists wanting to move (Table 33). Appendix B contains a complete list of statewide responses.

Valley County. As with the statewide sample, improved economic conditions are viewed as the primary benefit of increased tourism (89%) (Table 32). Crowding in general (35%) and increased crime (18%) were the most frequently noted disadvantages of increased tourism in Valley County (Table 33). Appendix C contains a full list of Valley County responses.

Table 32: Top Advantages of Increased Tourism in the Community

Top Advantage*:	Valley County	Statewide
Overall economic benefit (more jobs, income, etc.)	89%	96%
No advantage	3%	11%
More people/Meeting people from other areas	3%	2%

The primary advantage of increased tourism is the perceived economic benefits to the community, including more jobs, more income and higher profits in the community.

*Respondents could offer more than one suggestion

Table 33: Top Disadvantages of Increased Tourism in the Community

Top Disadvantage*:	Valley County	Statewide
Crowding (traffic congestion, recreation areas, etc.)	35%	51%
Crime	18%	6%
No disadvantage	13%	7%
Land abuse/Air pollution/Wildlife decline/Loss of open space	7%	8%
Lack of facilities/services (restaurants, lodging, etc.)	5%	--
Influences too many people to move here	5%	13%

*Respondents could offer more than one suggestion



General Tourism Issues

Valley County respondents were also asked to share their views on some issues dealing with general attitudes towards tourism in general. There are no obvious differences between the opinions of Valley County residents and those of the statewide respondents.

Statewide: The respondents to the statewide survey largely agree with all the statements presented. Seventy percent agree that tourism increases opportunities to learn about other people and cultures. However, 63 percent feel that tourists do not pay their fair share for services they use, and 80 percent feel that most of the jobs in the tourism industry are low paying (Table 34).

Valley County: Valley County residents have the same feelings about the presented statements as do the statewide respondents. Over half of Valley County respondents agree that tourists do not pay their fair share for the services they use. Seventy-seven percent think that jobs in the tourism industry are mostly low paying. Over three-fourths of respondents feel that tourism increases opportunities to learn about other people and cultures (Table 34).

Table 34: General Tourism Attitude Issues

Statement:	Strongly Agree	Agree	Disagree	Strongly Disagree
Tourists do not pay their fair share for the services they use	8%* <i>27%</i>	44% <i>36%</i>	45% <i>32%</i>	3% <i>5%</i>
Tourism increases opportunities to learn about other people and cultures	16% <i>10%</i>	69% <i>60%</i>	13% <i>25%</i>	2% <i>5%</i>
Most of the jobs in the tourism industry are low paying	16% <i>26%</i>	61% <i>54%</i>	21% <i>18%</i>	2% <i>2%</i>

***Valley County percentages in boldface**, *statewide percentages in italics*.

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

QUESTIONS SPECIFIC TO VALLEY COUNTY

The Valley County Community Tourism Assessment Committee (CTAP) was given the opportunity to include questions specific to Valley County in the questionnaire. The content of these questions was decided during the first community committee meeting. The following section of the report addresses these questions and other community-specific information.

Tourism Development/Promotion Potential of Valley County Recreation Resources

Residents were asked to rate their desire for tourism development/promotion of a variety of tourism and recreation resources in Valley County. The rating scale used included 1 (no additional development/promotion), 2 (maintain for local use only), 3 (limited development/promotion), and 4 (intensive development/promotion).

Three of the 12 items listed received the largest portion of votes for intensive development. These were the St. Marie area, the Visitor Center and city beautification. One item, the Milk River dike bike path, received the largest portion of votes to be maintained for local use only. All other items received the largest portion of votes for limited development, as no item received the largest share of votes for “No additional development” (Table 35).

Table 35: Tourism Development/Promotion Potential of Valley County Resources

RESOURCE:	No additional development/promotion	Maintain for local use only	Limited development/promotion	Intensive development/promotion
St. Marie development	17%	5%	30%	48%
Pioneer museum	3%	8%	45%	44%
Red Bottom celebration	22%	14%	49%	15%
Ice fishing derby	10%	13%	49%	28%
Visitor center	5%	3%	45%	47%
Outfitting services	38%	5%	39%	18%
Bike path along Milk River dike	14%	35%	27%	24%
Working ranch vacations	15%	11%	49%	25%
Sports/convention center	16%	12%	38%	34%
Indoor water slide (winter use)	29%	10%	32%	29%
BLM land utilization	24%	10%	49%	17%
City beautification	3%	20%	31%	46%

Valley County residents are pretty open to development of their local resources for the benefit of tourism promotion. Nearly all of the resources were recommended for either limited or intensive development.

*Represents percent of responses for each resource in each category.

Row total may not add to 100% due to rounding.

Residents’ own suggestions: Respondents were also given the opportunity to make their own suggestions as to what Valley County attractions should be developed to promote tourism. This was done to solicit ideas other than those resulting from the CTAP committee meetings. As it turns out, further development of the Fort Peck area is strongly favored by those offering additional suggestions (91%)(Table 36).

Table 36: Valley County Attractions, Suggestions

Top Responses*:	Valley County**
Fort Peck area/Interpretive center/Fish hatchery	91%
Museum/Pioneer Museum	20%
Fishing/Fishing tournaments	10%
St. Marie air base	6%
Dinosaurs/fossils	5%
County Fair	4%
Hunting	4%

*Respondents could offer more than one suggestion

**Represents suggestions made by 128 people

Characteristics and Values of Valley County

Characteristics of Valley County's past: Residents were asked what characteristics of Valley County's past they value and would like to see continued into the future. This was an open-ended question, and the responses reflect the respondents' own ideas and wording. The characteristic mentioned the most was the area's heritage of agriculture and family farms (24%), followed by hunting and fishing traditions (16%), friendly neighbors (12%), and community/family values (12%) (Table 37).

Table 37: Characteristics of Valley County's Past

Top Responses*:	Valley County
Agricultural heritage/family ranching/rural character	24%
Hunting and fishing	16%
Friendly neighbors	12%
Community values/Family values	12%
Independence	9%
Museum/Pioneer Museum	9%
Fort Peck theatre/Fort Peck dam	7%

*Respondents could offer more than one suggestion

Characteristics of Valley County today: Residents were also asked what characteristics of Valley County *today* they value and would like to see continued into the future. Respondents indicated that wholesome values and a good work ethic are important to them (46%). They also find the clean and natural environment (12%) and family ranching and agriculture (12%) to be of great importance (Table 38).

Table 38: Characteristics of Valley County today

Top Responses*:	Valley County
Wholesome values/Good attitudes/Work ethic/Openness/Nice people	46%
Clean/natural environment	12%
Family ranching/Agricultural base	12%
Recreational opportunities	11%
Low crime/Safety	9%
Family businesses/Maintaining businesses	8%

Valley County residents favor the values associated with their farming/ranching heritage. These are characteristics of Valley County's past as well as its present.

*Respondents could offer more than one suggestion

Present conditions not desired: In an effort to generate ideas for how Valley County can be improved, residents were asked what present conditions they would prefer *not* to see in Valley County in the future. The condition of the towns of Valley County figured prominently at the front, with 22 percent criticizing their poor/trashy appearance. A close second was the “exodus” of young people from the area (18%), followed by the widespread closing of existing businesses and the lack of new ones to take their place (17%) (Table 39).

Table 39: Present conditions not desired for the future

Top Responses*:	Valley County
Unappealing appearance of towns	22%
Exodus of young people/Population decrease	18%
Closing of existing businesses/Lack of new businesses	17%
Illegal activity (drugs, drinking, crime, vandalism, etc.)	10%
Lack of community involvement/Selfishness/Negativity	9%

The noticeable flow of people out of Valley County may be related to the closing of businesses, and vice versa. Both are conditions undesirable to County residents.

*Respondents could offer more than one suggestion

Missing from Valley County: A fourth open-ended question asked residents what they feel is missing from Valley County. Topping the list is well-paid jobs to keep youth in the area (23%). Twenty-two percent would like to see more shopping opportunities in Valley County, and another 12 percent feel that industry and manufacturing are missing from the County (Table 40).

Table 40: Missing from Valley County

Top Responses*:	Valley County
Good-paying jobs to keep youth in communities	23%
Increased shopping opportunities	22%
Industry and manufacturing	12%
More residents/Increased population	8%
Fort Peck interpretive center/fish hatchery/museums/water slides	6%
Stronger agricultural sector	5%
Youth center/youth activities	4%
Optimism/Progressive thinking	4%

Valley County respondents have a clear idea of what it takes to alter the conditions they find unsatisfying.

*Respondents could offer more than one suggestion

Other Questions

Hunting and fishing: Hunting and fishing constitute two main recreation activities of Valley County residents. They are also popular activities with people visiting the county. If hunting and fishing opportunities were to be developed for tourists, it would have an impact on the enjoyment county residents derive from these activities. In an effort to estimate this impact, residents were asked if they participate in hunting and fishing (47% and 52%, respectively) (Table 41).

Residents were also asked about the influence increased promotion of hunting and fishing would have on their experience, and how acceptable this influence would be to them. Influence was measured on a 5-point scale, with 1 representing “Very negative influence” and 5 representing “Very positive influence”. The mean value was 2.78.

Acceptability was also measured on a 5-point scale. This time 1 represented “Not at all acceptable” and 5 represented “Very acceptable”. Here, the mean value was 3.02, indicating that although hunters and fishers in Valley County expect to be somewhat adversely affected by increased promotion, they are willing to live with this influence “for the good of the community”(Table 42, Figures 1 and 2).

Table 41: Hunting and Fishing Participation

Participation:	Yes	No
Hunting	47%	53%
Fishing	52%	48%



Table 42: Influence of Promotion, Acceptability of Influence

	Very negative influence 1	2	3	4	Very positive influence 5	Mean
Influence of increased hunting and fishing promotion on the hunting/fishing experience.	23%	14%	39%	9%	15%	2.78
Acceptability of the influence of increased promotion of hunting and fishing.	18%	13%	39%	11%	20%	3.02

*Represents percent of responses for each resource in each category.
Rows may not total 100% due to rounding.

Figure 1: Indicated Influence of Hunting/Fishing Promotion

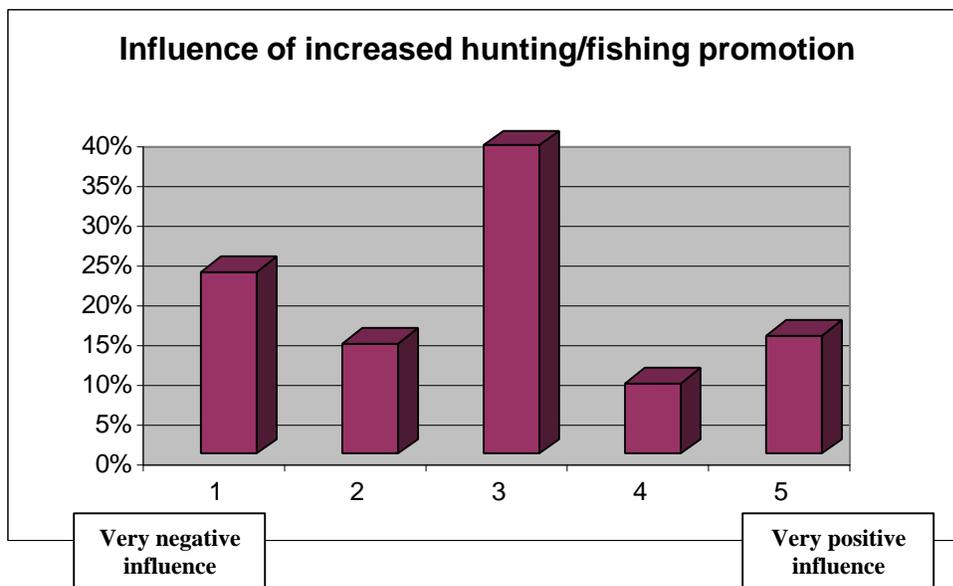
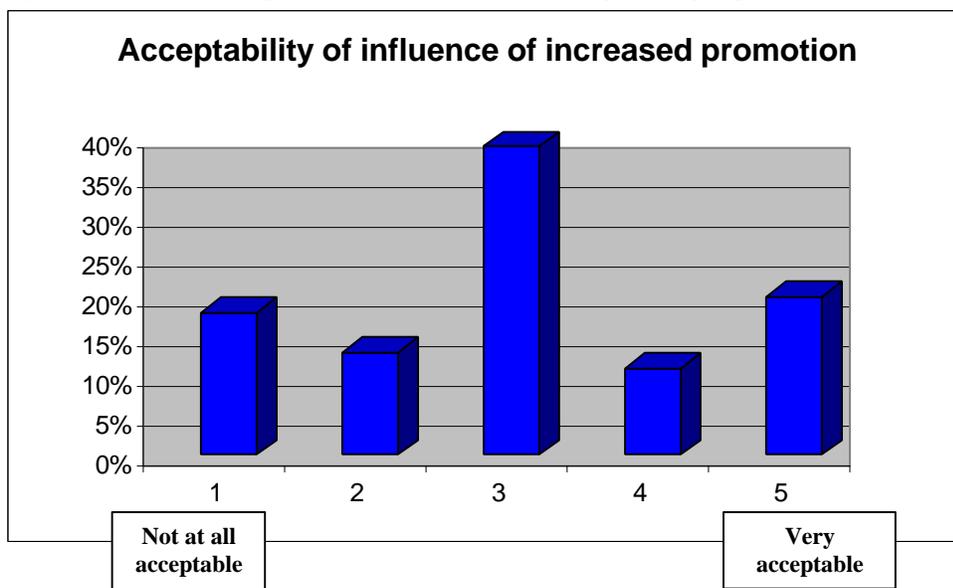


Figure 2: Indicated Acceptability of Influence on Hunting/Fishing Experience



Lewis & Clark legacy: Because the Missouri River and the Lewis & Clark Expedition figure prominently in Valley County's history, residents were asked to offer ideas for one thing that could be done as a Lewis & Clark legacy to allow the county to capitalize on the Lewis & Clark Bicentennial (Table 43). Appendix C contains a complete list of suggestions.

Table 43: Lewis & Clark Legacy

Top Suggestions:	Valley County*
Fort Peck activities (interpretive center, reproduction, reenactment, etc.)	31%
Memorial Museum/Visitor Center	10%
Memorial park/statue	8%

*Percentages do not add to 100 because not all suggestions are listed



GENERAL COMMENTS

Respondents were provided with space at the end of the survey form to include their own thoughts and comments. Twenty-eight of the 171 responding households took the time to provide additional comments related to this subject. Table 44 below includes the most commonly occurring themes among the comments. For a complete list of individual statewide comments, see Appendix B. For a complete list of individual Valley County comments, see Appendix C.

Table 44: General Comments

General Themes of Comments	Valley County*
Nonresidents should not get to hunt at the expense of citizens	25%
Nothing to keep young people in Valley County	14%
Glasgow is dying—needs more business and industry	11%
Tourism will help support full-time jobs	11%

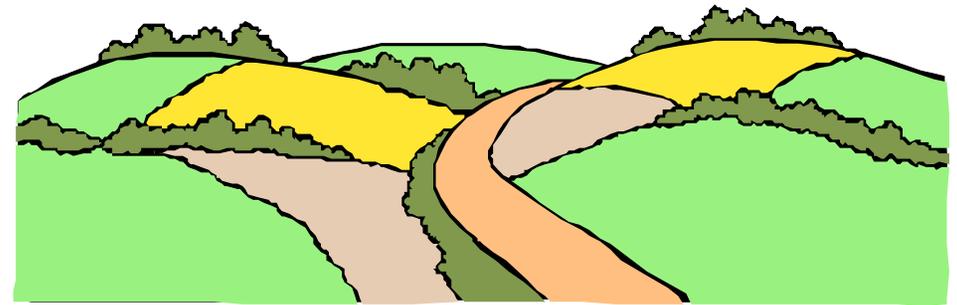
* Represents comments made by 28 respondents



**APPENDIX A:
VALLEY COUNTY SURVEY INSTRUMENT**

Please include any additional comments.

Resident Opinions About Tourism in Montana and Valley County



Thank you for your participation.

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

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

Fall 1999

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

1. In your opinion, how is the population changing in Valley County? (please one)
 - Growing
 - Decreasing
 - Not Changing
- 1a. If you feel the population in Valley County is changing, is it changing... (please one)
 - Too fast
 - About right
 - Too slow
2. How much contact do you have with tourists visiting your community? (please one)
 - Regular
 - Somewhat frequent
 - Infrequent
 - Almost never
3. Which of the following statements best described your behavior toward tourists in Valley County? (please one)
 - Make them feel welcome
 - No specific reaction
 - Avoid them
4. How dependent is your job on tourism? (please one)
 - Not at all dependent
 - Somewhat dependent
 - Very dependent
5. How much of your household income is derived from the tourism industry? (please one)
 - None at all
 - 1% to 25%
 - 26% to 50%
 - 51% to 75%
 - 76% to 100%
6. Compared to other industries, how important a role do you think tourism should have in Valley County's economy? (please one)
 - No role
 - A minor role
 - A role equal to other industries
 - A dominant role

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

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

1. Where in Valley County do you live? In town Out of town
2. Were you born in Montana? Yes No
3. How many years have you lived in... Valley County? ____ Montana? ____
4. What is your age? ____ years
5. What is your gender? __M __F
6. Which one of the following best describes **your** occupation? (please one)

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

▶▶▶▶ Please include any additional comments on the back. ▶▶▶▶

Part 4: Please indicate your level of support for each of the following statements regarding tourism in Valley County. Then tell us the top advantage and disadvantage of increased tourism in Valley County. Finally, evaluate tourism in the State of Montana.

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

13. In your opinion, what is the **top advantage** of increased tourism in Valley County? _____

14. In your opinion, what is the **top disadvantage** of increased tourism in Valley County? _____

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

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

Part 2: Questions Specific to Valley County and Visioning Questions

1. In your opinion, which Valley County attractions can be developed to promote tourism? _____

2. Listed below are places and activities that can potentially be promoted or developed in order to increase tourist visitation. For each place or activity, please indicate the level of development/promotion you would support. Use the response codes below to indicate your feelings.

- 1 = No additional development/promotion
- 2 = Maintain for local use only
- 3 = Limited development/promotion
- 4 = Intensive development/promotion

St. Marie development	___	Bike path along Milk River Dike	___
Pioneer Museum	___	Working ranch vacations	___
Red Bottom celebration	___	Sports/convention center	___
Ice Fishing Derby	___	Indoor water slide (winter use)	___
Visitor center	___	BLM land utilization	___
Outfitting services	___	City beautification	___

3. If Valley County can do one thing as a lasting Lewis & Clark legacy, what would you suggest? _____

4. Do you participate in hunting or fishing activities?

- | | | |
|---------|---------|--------|
| Hunting | ___ Yes | ___ No |
| Fishing | ___ Yes | ___ No |

4a. If hunting and/or fishing in Valley County were more actively promoted to out-of-state visitors, how would that influence your experience?

5
4
3
2
1

Very positive influence Very negative influence

4b. How acceptable would this level of influence be to you?

5
4
3
2
1

Very acceptable Not at all acceptable

5. What characteristics of Valley County's past do you value and would like to see continued into the future? _____

6. What characteristics of Valley County today do you value and would like to see continued into the future? _____

7. What present conditions would you prefer *not* to see in Valley County in the future? _____

8. What is missing from Valley County that you would like to see in the future? _____

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

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

**APPENDIX B:
STATEWIDE COMMENTS**

STATEWIDE COMMENTS

(verbatim, spelling corrected)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

I see tourism as a potential #1 industry- since environmentalists have caused the demise of all mining in this area (ASARCO-

Noranda-WR Grace Vermiculite mine) and greatly curtailed our logging industry. It becomes necessary to attract some type of industry to this community... Otherwise, we will be old retired folks who live here just for the scenery.

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

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

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

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

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

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

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

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

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

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

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

**APPENDIX C:
VALLEY COUNTY COMMENTS
AND OTHER RESPONSES**

VALLEY COUNTY COMMENTS

(verbatim, spelling corrected)

Too bad Valley County didn't get the new prison - it would have been a large economic boost - stability and not just in and out tourism money.

We cannot allow this outfitter garbage to continue. It is wrong to deny elk and other tags to Montanans so that an outfitter is guaranteed so many for out of staters. Let the tourism industry make it's own money with out short changing citizens.

I'm a local business owner that depends on tourism. For both myself and my staffs pay checks increased tourism I think will be a big plus. Towards being able to keep people on staff - full time.

Too much time is spent on tourism. All the efforts to bring anything into Valley County is placed on Glasgow or St. Marie - they forget the rest of County except when they want money. Also shouldn't promote sales tax - we have to pay in 365 days - tourist only when in state - will lose tourist if enacted. They say they enjoy no sales tax, will really hurt towns along sales taxed states. Please remember the rest of the towns in Valley County, not just Glasgow.

Montana needs jobs to get people off of Welfare. Tourism is nothing permanent - just comes and goes. Helps only to a degree and those that move in only make taxes higher for those already here.

We fee our young people are all leaving because there are no job opportunities- this is what we need to work on. Also how to keep more families on smaller farms or acreage. Best place in the world to raise a family- we need to come up with ideas and actual ways for our young people to make a living on farms and try to keep the small instead of having

Wolf Point has so many things going on all the time, I don't know why Glasgow can't. Such as X-mas parades, chili feeds, also there isn't also there aren't enough stores. Now when Ben Franklin closes there will be no place to buy fabric, we don't need expensive stores, just some for common people.

I work for an RV park in the summer. People (tourists) are delighted and surprised with the beauty and fun of the Fort Peck area. The state (Montana) should do more to promote this area and to show the local residences that tourism is a good thing. Too many people in Valley County are too set in their ways and not adaptable to change. They need fresh ideas but so far, the few of us who have moved to this area and can envision growth and prosperity are only ridiculed and ostracized. Two things people coming from the east along Route 2 say...."there are no rest stops or information centers between N. Dakota border and Hindsdale (over 250 miles) and why are there so many white crosses along Route 2?".

One thing I would like to see is a place for kids to go where no drug, alcohol or cigarettes were sold or allowed. A skating rink for roller bladers so the kids can skate all year round. Would keep them off of the street, maybe some sort of entertainment for adults as well. Also hobby and craft shows that would appeal to more people to come in the first place. I feel the Fort Peck center when built will be a good draw for tourists.

People here in V. County now are mostly older folks. They are retired or close to retirement. I'm 39 and raising a family would like to see a change to where all our kids wouldn't move away. If you don't own a business where your kids could run they don't have a chance to stay. We need some industry so the jobs would be better so young people would move here.

If the agricultural economy does not survive in a way that sustains family farmers, it doesn't matter how much effort you put into tourism development. It can not sustain a substantial enough economic base to ensure the viability of our communities.

It bothers me that people of our area and Montana are so hep on tourism. Our agricultural community is very depressed. If our downtown fathers worked as hard for the farmers and ranchers as they do for Dinosaur Museums. It would create a more positive image for our town. Interpretive centers, etc. should be far down on the list of priorities. Thank you. Let's promote our #1 industry - agriculture.

It seems to me that this county has had chances to grow but they don't want it.

Valley County by population and businesses is dropping too fast. We need tourism as we have the points of interest - Fort Peck Lake - Projects already started like Hatchery, Interpretive center goals, Walleye interest. Unless we start planning and developing we'll lose our youth. Too many empty homes and businesses speak loudly for need of tourism.

How can one work on "economic development" when the state itself can't define its meaning - "economic development" does not simply mean tourism!! "Economic development" is something other than a bureaucracy and loan review committees. There should be a state law against having bankers on economic loan review committees. Bankers don't develop anything - they are on the committees for public exposure and resume building only. It takes citizen groups to accomplish development projects.

As an Electrolux salesman and as a traveler visiting even out of state, I am forced to stay a lot in motels. My no 1 gripe about the state of Montana is the bed tax especially to Montanans. We don't need it to promote tourism - that is best left to state and local chamber of commerce groups. Do away with the bed tax.

First - Yes, tourism would bring in money. No- tourism is not all for the best. Yes- it will help a number of people. No- not everyone will see the influence. Yes- more jobs. No- what % are quality jobs. Yes- rich benefits. No- the lower income benefit. Yes- some opportunities come from tourism. No- are they all to better, a lot (the communities) or a few. Good and bad come from any or all things in life. It's how you deal with exploiting the good and minimize the bad. And keeping and doing your homework ahead of time. Not playing catch up at someone's expense. Tax payers, Montana. These questions really don't need to be asked do they? Reality of the situation (common sense) should prevail to most people the obvious. In other words - no shit tourism would bring in money and !!!

I think the growth in Valley Co. hinges on our promoting things in the Fort Peck area. It is our biggest tourist attraction in northeastern Mt. And I've wondered for 40 years why our area business' have not promoted it, because it would benefit all Glasgow business people in our area. We don't have a Glacier park or a Yellowstone so we have to develop and work with what we do have and that is Fort Peck. My daughter has been on the state tourism board for over 10 years and she has represented our area to get more development here. I'm glad to see that our younger people are interested in our community and doing something about it.

We feel that state officials and all Montana people should be working to increase wages for all its people. Teachers - 48th in pay in US other jobs are similar. Recreation in Montana has become big business. However, with out-of-staters coming in we are being run out. Yes, over west, on one of the Pot Hole Lakes, prices to rent a lot have become outrageous - going from \$35/yr to \$3500/yr, here in our area lot rent on Fort Peck lakes has gone from \$20/yr to \$115/yr with no long term guarantees. Sure people in California and other states might and are paying these prices, but their running the locals out. After we've done the work to develop them. They are also ruining our hunting and fishing. Something is definitely wrong in this area but I have no answers for it. Yes, We still like people from out of state to visit but would like Montanans to be treated better by the state.

All in all the FWP is ruining the hunting. The problem started 5-6 years ago with unlimited mule deer doe and antelope tags almost wiped them out in So. Valley. So the stupid idiots did the same in No. Valley. Greed seems to be a problem. Piss poor management. They want to blame it on mother nature because there weren't any animals left to hunt. A lot of out of staters came to this area which was good but future hunting was not good. Thanks to FWP lot of money involved Fish, Wildlife, and Parks.

There is nothing in Valley County to keep our young people here. They graduate and leave because there is nothing to keep them here. We need to bring in more industry and manufacturing. Create more jobs and better paying jobs with a future. Glasgow and a lot of the other towns in Montana are dying. Why worry about tourism if there are no towns or people?

Why is the burned out RUSTIC LODGE still standing. It is an eye soar and dangerous. It's been left like that way over a year! It looks awful!!!

I guess I really like the small rural community way of life, but realize that we need new industry in the area. Tourism is probably one good way to increase income and build up the area. If we don't look for ways to grow we'll die as a town, judging from all the businesses that have closed this has already begun.

We need to find some form of industry /jobs for the small towns before they fade away!
We need to promote our agriculture--it should not be sent out of state for processing.
We need higher paying jobs--cost of living is high in small town America.

**VALLEY COUNTY
TOP ADVANTAGES
OF TOURISM**

- Overall economic benefit
- Activity
- No advantage
- More people/people from other areas
- Learning visitors wants/needs
- Improved quality of life
- Maintain positive infrastructure
- Availability of goods

**VALLEY COUNTY
TOP DISADVANTAGES
OF TOURISM**

- Natural resource abuse/pollution/loss of open space
- Littering
- Worsening road conditions
- No disadvantage
- Influences people to move here
- Crowding
- Imposition on privacy and freedom of residence
- Low paying/temporary jobs
- Increased cost of living
- Decreased quality of life
- Lack of facilities/services
- Lack of recreational access
- Lack of development planning
- Loss of revenue
- Misuse of tax dollars
- Seasonality of tourism industry
- Impact on infrastructure/services
- Not prepared for increased tourism

**VALLEY COUNTY
SUGGESTED ATTRACTIONS**

- Fort Peck area (Interpretive center, hatchery, etc.)
- Pioneer museum
- Fishing opportunities (tournaments, etc.)
- Shopping opportunities
- Historical sites/events
- Murals around town
- St. Marie air base
- Hunting opportunities
- Milk River
- Off-roading (ATV, motorcycles, etc.)
- Dinosaurs/fossils
- County fair
- Scottish stuff
- Amtrak station/railroad history
- Agricultural heritage/dude ranch
- Rodeo
- Recreation opportunities
- Goods and services
- Open space
- Boating
- Roller skating
- Life style
- Tour of County in old cars
- Buffalo jump
- Theatre
- Glasgow