

Three Communities Explore Tourism

Glacier County, MT
Deer Lodge, MT
Livingston, MT

The 1996 Montana Community
Tourism Assessment Process

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Research Report 47

September, 1996

Executive Summary

This report presents information, including present levels and characteristics of travel, and residents' opinions about tourism for the three Montana communities of Glacier County, Deer Lodge, and Livingston along with characteristics for a statewide sample.

Visitors

- In 1995 over three million visitor groups came through Montana. Of those, about half a million went through Glacier County, about one million through Deer Lodge and about one million went through Livingston.
- Over \$1.2 billion was spent statewide in 1995 by nonresident travelers. Glacier County and Livingston both received about the same share of that money but Glacier County only had half as many visitors. Deer Lodge generated only about half as much revenue as either of the other two, but had many more visitors pass through than did Glacier County and almost as many as passed through Livingston.
- Glacier County travelers had the highest average daily expenditures, the longest length of stay in Montana, the highest total Montana expenditures and the highest total expenditures in the sample community.
- Visitors passing through Deer Lodge and Livingston tended to be slightly older, more likely to be retired, less likely to have children in the group, and to belong to a slightly lower income group than the other samples.
- Visitors passing through Glacier County stayed in Montana longer, tended to camp more, stay with friends and relatives less, and were more likely to be on their first trip to Montana.
- Glacier County travelers had a higher rate of participation in outdoor recreation activities than did other samples and were more likely (58%) to say their primary reason for visiting was vacation.
- Travelers in Deer Lodge and Livingston were most likely to be in Montana just passing through to some other state.

Resident Opinions about Tourism

- All four sample groups indicated the overall benefits of tourism outweigh the negative impacts, that state tourism promotion benefits their community economically, and that they supported continued tourism promotion by the state of Montana.
- The majority of respondents did not believe there would be a personal financial benefit from increased tourism, that tourism would help their community grow in the right direction, or that increases in tourism would improve the quality of life for Montanans.
- Livingston and the statewide respondents indicated a slightly negative overall perceived influence from tourism on their well-being, while Glacier County and Deer Lodge respondents felt that tourism had a somewhat positive influence on well-being.
- The perceived top advantage of tourism was the economic benefits and the increased number of jobs.
- The perceived main disadvantages included traffic and crowding mentioned by all respondents; population growth by the statewide sample; increased prices, crime and pollution by Glacier County residents; and low paying jobs, seasonality, and crowding by Deer Lodge residents.

- Livingston residents perceived the future of their community as the brightest while Glacier County residents were less positive about their community.
- Livingston residents believed that tourism caused congestion in their community, while other samples did not believe tourism was the major contributor to congestion.
- All sample groups rated the condition of the environment, parks and recreation areas, and cultural and historic preservation as good; but highways and roads and the state's economy were rated as poor.
- Most respondents believed that community conditions were good, except for cost of living, roads, long-term planning, and job opportunities.
- The statewide and Livingston respondents were significantly less supportive of tourism development than were Glacier County or Deer Lodge respondents.
- Respondents from all samples who felt their community was growing too quickly scored significantly lower on both the tourism support and the tourism influence indexes.

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Introduction

This report is intended to provide a comprehensive profile of current visitors and resident opinions about tourism in three communities participating in the Montana Community Tourism Assessment Process (CTAP). CTAP is facilitated by Travel Montana and the Montana State University Extension Service. Each year three communities are chosen to participate in the CTAP program from the eligible pool of applicants. The 1996 communities included Glacier County, Deer Lodge, and Livingston. Montana communities that have previously used the process include Choteau, Libby, Lewistown, Glendive, Fort Belknap Indian Community, Ravalli County, and Three Forks. The initial assessment process takes about nine months to complete.

At the conclusion of the assessment process, members of the CTAP committees decide whether further tourism development would be beneficial to the community and, if so, suitable projects are identified and pursued. The decisions about how to proceed is based on consideration of a wide variety of information, including present levels and characteristics of travel, existing travel-related infrastructure and attractions, the area's need for economic development, and residents' opinions about tourism. The resident tourism committees are encouraged to continue beyond that time with work that was started using 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. The current visitor profile for each community was developed based on research conducted by ITRR during 1993. At that time, a year-long survey was conducted of nonresident travelers in Montana. A profile of visitors was developed from the subset of surveys that represented nonresident travelers passing through each of the communities. The assessment of resident opinions was developed based on mail-back questionnaires obtained from sampled residents of each community in April and May of 1996. A statewide sample of resident opinions was also obtained and the results of that sample and the profile of nonresident visitors are reported at the state level for comparison to local conditions.

Methodology

Data collected for this study came from the ITRR Nonresident Travel Study and the ITRR Resident Opinion Study. The 1993 Nonresident Travel Study provides the most recent year-long travel data. Methods for each set of data are explained further.

The Nonresident Travel Study

Travelers to Montana during calendar year 1993 were intercepted for the Nonresident Travel Study. The traveler population was defined as those persons who entered Montana by private vehicle or commercial air carrier during the study period, and whose primary residence was not in Montana at that time. Specifically excluded from the study were those persons traveling in a plainly marked commercial vehicle such as a scheduled or charter bus or semi truck. Also excluded were those travelers who entered Montana by train. Other than the exclusions mentioned above, the study attempted to assess all types of travel to the state including travel for pleasure, business, passing through or any other reason.

Data were obtained through a mail-back diary questionnaire that was administered to a sample of intercepted travelers who entered the state. During the course of the year, 11,457 groups were contacted. Usable questionnaires were returned by 5,238 groups for a response rate of 46%. For a complete discussion of the methodology and results of the 1993 Montana Nonresident Travel Study see Christensen, Maiorano and Menning (1995)¹. To apply this data to specific communities, visitors were identified by travel routes indicated on the questionnaire map. A sample of 842 surveys were identified for Glacier County, 1,196 for Deer Lodge, and 1,495 surveys for Livingston visitors. Samples drawn for each community could overlap if the travel route included more than one of the study communities. The statewide sample included all travelers in the other three samples. Because this study represents nonresident travel, the community data do not include visitors from other parts of Montana. The top half of Table 1 shows the sizes of the nonresident travel samples.

The Montana Resident Opinions Study

A mail-back questionnaire was administered to a sample of residents in the three CTAP communities and to a statewide sample of Montana residents during late April of 1996. That mailing was followed one week later by a reminder postcard and two weeks after that by a replacement questionnaire to those residents who had not yet responded.

Resident Response Considerations

A nonresponse bias check was not conducted at the conclusion of the sampling effort. Checks are generally conducted to determine if people in the sample who did not respond to the questionnaire differed on key issues from those who did respond. In this case, the key questions that may have differed between respondents and nonrespondents involved statements about support for tourism development. It is believed responses to those key questions are context and temporally sensitive. The mailout questionnaire was designed to set the context for the tourism support questions, and therefore, it would not be possible to develop that context in a condensed telephone nonresponse check. In addition, the nonresponse check would have been conducted several months after the initial survey. Past ITRR research has shown a relationship between the degree of support for tourism and what time of year the residents are polled, leading to concern that comparability between initial responses and follow-up telephone checks would be questionable. Because of these reasons, it was decided that comparable data could not be generated from telephone nonrespondent interviews, and therefore would be of little value in adjusting the survey results.

There are two possible response biases that can be identified. Males, representing about 63% of respondents, are over-represented in the data. This resulted from the mailing list that tended to list the male householder's first name rather than the female's. Secondly, only 17% of Glacier County respondents reported being enrolled Blackfeet tribal members. The actual percentage of county residents that were enrolled tribal members would be considerably higher.

¹ Christensen, N. A., Maiorano, B., Menning, N. L. (1995). 1993 Nonresident Travel to Montana: Characteristics of Visitors, by Season. Research Report 40, Institute for Tourism and Recreation Research, School of Forestry, The University of Montana, Missoula, 31 pp.

The reader is cautioned to remember that these results represent opinions from about half those residents polled. It is hoped that respondents did not differ from nonrespondents in their opinions. The lower portion of Table One summarizes sample sizes and response rates for the resident portion of this report.

Table 1: Sample Sizes and Response Rates for the Survey Samples used in this Report

	Statewide	Glacier County	Deer Lodge	Livingston
Nonresident groups contacted:	11,457			
Usable nonresident travel questionnaires returned:	5,238			
Nonresident Travel Study response rate:	46%			
Sample size of nonresident travel groups:		842	1,196	1,495
Resident questionnaires sent out:	1,000	500	500	500
Resident questionnaires delivered:	914	485	476	455
Resident questionnaires returned:	413	212	265	214
Resident Opinion Study response rate:	45%	44%	56%	47%
Percentage of respondents who were male	68%	60%	64%	56%
Enrolled Blackfeet tribal member	n/a	17%	n/a	n/a

Source: 1993 Nonresident Travel Survey and the 1996 Resident Opinion Survey, ITRR

Findings

The profile of current visitors data were generated from the 1993 Nonresident Travel Study. Data for the section on residents' opinions about Montana, their community and tourism were from a 1996 survey.

A Profile of Current Visitors

According to the ITRR visitor estimation model, there were 3,370,000 visitor groups (averaging 2.4 people per group) to Montana during 1995². About half of those visits occurred during the summer months of June, July and August. It is estimated that 531,000 of those groups passed through Glacier County, 960,000 through Deer Lodge, and 1,167,000 groups passed through Livingston. While it cannot be estimated from the data, it is likely that the majority of the groups passing through a community did not stop. The profile represents all nonresidents passing through - even if they did not stop in an area. The questionnaire was designed to measure travel to Montana so the profiles of visitors to communities are limited to describing characteristics of group trips to Montana, not to a particular location within Montana.

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 represents traveler characteristics that were estimated from data collected in 1993, while the estimated number of travelers and their total economic impacts have been adjusted to represent 1995.

Group Characteristics

Table 2 shows travel group characteristics. There were few real differences between the travel groups to each community and the entire statewide sample. The majority of travelers in all samples were traveling as families with an average group size of about 2.4 and consisting mainly of adults. Visitors passing through Deer Lodge and Livingston tended to be slightly older, more likely to be retired, less likely to have children in the group, and to belong to a slightly lower income group than the other samples. Visitors passing through Glacier County stayed in Montana longer, tended to camp more, stay with friends and relatives less, and were more likely to be on their first trip to Montana.

Table 2: Characteristics of Nonresident Travelers Visiting Montana during 1993

Characteristics:	Statewide	Glacier County	Deer Lodge	Livingston
Group Type				
Family	68%	72%	72%	71%
Alone	17%	10%	16%	15%
Friends/ F&F	14%	18%	11%	13%
Other	1%	0%	1%	1%
Group Size	2.4	2.4	2.3	2.3
Adult Males	42%	42%	43%	43%
Adult Females	42%	42%	43%	43%
Children	17%	17%	13%	13%
Mean Avg Adult Age	50	50	52	51
Have visited MT before	82%	66%	79%	76%
Will return w/in 2 years	83%	67%	80%	78%
Median household income	\$50,000	\$50,000	\$35,000	\$35,000
Percent Retired	25%	24%	28%	27%
<hr style="border-top: 1px dashed black;"/>				
Total nights spent in MT	3.0	4.1	3.0	3.3
Home of friend, relative %	30	15	27	30
Hotel, motel %	37	39	43	42
Private campground %	13	20	17	12
Public campground %	7	15	7	6
Other %	7	5	3	3
Undeveloped camp %	0	2	3	0
Resort, guest ranch %	3	2	0	3
Condominium %	3	2	0	3

Source: 1993 Nonresident Travel Survey, ITRR

The most common home state/province for visitors to Montana in 1993 was Washington. That was true statewide and in each community except Glacier County, whose visitors were more likely to be from Alberta. In fact, with Glacier County's shared border with Canada, over 25% of the travelers through the

area were from north of the border. With significant decline in Canadian travel to the US since this study was conducted, it is likely that this statistic would be different if the data were more recent. Table 3 lists visitor origins.

Travel Characteristics

The point of entry into Montana is a good indication of the origin of travelers found on different highways throughout the state. Interstate 90 with entry points in the West and Southeast of Montana accounted for the greatest percentage of nonresident traffic into the state. Table 4 lists top entry points for each sample.

Table 5 indicates where visitors spent the night while in Montana. Of the nights spent in Montana, 14% of those by travelers through Glacier County were spent in the county (outside of Glacier National Park) with the park accounting for an additional 7% of nights. Travelers through Deer Lodge spent 2% of their nights there, while travelers through Livingston spent 4% of their nights in Livingston.

Table 3: State or Province of Residence of Visitors to Montana During 1993

State/Province of Origin:	Statewide %	Glacier County %	Deer Lodge %	Livingston %
Washington	15	8	28	18
Alberta	9	16	1	1
Idaho	8	2	8	5
California	7	10	7	7
North Dakota	6	1	2	4
Wyoming	6	1	2	3
Minnesota	4	3	4	7
Oregon	4	2	6	5
British Columbia	3	5	2	2
Utah	3	2	2	2
Colorado	3	2	3	4
Other Country	2	6	3	3
Texas	2	3	2	2
Wisconsin	2	3	3	3
Saskatchewan	2	3	*	*
Arizona	2	2	2	2
South Dakota	2	*	2	3
Illinois	2	2	3	3
Michigan	2	2	2	3
Ohio	*	2	*	2
Florida	*	3	*	*

Source: 1993 Nonresident Travel Survey, ITRR

* These and others not listed account for < 3% of visitors each

Table 4: Entry Location of Visitors to Montana During 1993

Location of Entry	Statewide %	Glacier County %	Deer Lodge %	Livingston %
I-90 - Superior, Idaho Border	17	7	37	22
I-90 - Wyoming Border	10	5	16	19
US 20 - Targhee Pass	7	3	2	7
I-15 - Monida Pass	6	5	10	3
I-15 - Port of Sweet Grass	6	4	*	*
I-94 - Wibaux, North Dakota Border	6	4	8	12
HW 200 - Fairview	6	*	4	6
US 2 - Troy	5	13	2	2
US 89 - Gardner	4	7	5	11
US 191 - West Yellowstone	4	5	3	3
US 89 - Port of Piegan	3	19	*	*
US 93 - Port of Roosevelt	3	4	*	*
US 2 - Culbertson	2	6	*	*

Source: 1993 Nonresident Travel Survey, ITRR

* These and others not listed account for < 3% of visitors each

Table 5: Location of Overnight Stays for Visitors to Montana During 1993

Location of Stay:	Statewide %	Glacier County %	Deer Lodge %	Livingston %
Billings	9	2	9	12
West Yellowstone	8	3	5	9
Missoula	8	5	15	8
Bozeman	6	2	7	9
Kalispell	5	10	4	2
Great Falls	5	6	2	3
Butte	4	3	7	5
Whitefish	3	5	2	*
Helena	3	3	*	2
Gardiner	2	*	2	5
Red Lodge	2	*	2	2
Livingston	2	*	2	4
Big Sky	2	*	*	2
Glacier N P	2	7	2	2
West Glacier	*	5	2	*
Miles City	*	*	2	2
St. Mary	*	5	*	*
Columbia Falls	*	2	*	*
East Glacier	*	3	*	*
Bigfork	*	2	*	*
Deer Lodge	*	*	2	*
Polson	*	2	*	*
Lolo	*	*	2	*
Cutbank	*	2	*	*
Babb	*	2	*	*
Browning	*	2	*	*

Source: 1993 Nonresident Travel Survey, ITRR

* These and others not listed account for < 3% of visitor stays each

Types of Trips

Some visitors had more than one reason for traveling in Montana. Table 6 lists the main reasons travelers came to Montana. The second column of each sample represents the primary reason (one answer per respondent) for travel to Montana. The most popular reason for statewide travelers and Glacier County travelers to visit Montana was for vacation/recreation. In the Deer Lodge and Livingston samples travelers were more likely to be just passing through the state. Visiting family and friends was also a major trip purpose for all sample groups.

Travelers who indicated vacation as one trip purpose also described what attracted them to Montana as a vacation destination. Table 7 shows that the scenery and landscape of Montana were the greatest attraction. Wildlife viewing, historic sites and camping were also popular attractions of Montana. Travelers in all samples showed similar response patterns on this question.

Table 8 lists activity participation rates by nonresident travelers in Montana. Driving for pleasure and viewing wildlife were the top activities in all samples. Visitors to Glacier County tended to be most likely to visit Glacier and Yellowstone National Parks, and Livingston visitors were most likely to visit Yellowstone National Park. In general, Glacier County travelers had a higher rate of participation in outdoor recreation activities than did the other samples.

Table 6: Purpose of Trip to Montana by Nonresident Travelers during 1993

Travel Purpose:	Statewide %		Glacier County %		Deer Lodge %		Livingston %	
	One Reason	Primary Reason	One Reason	Primary Reason	One Reason	Primary Reason	One Reason	Primary Reason
Vacation	61	34	91	67	58	28	63	33
Visit Family/Friends	30	18	21	11	29	14	30	16
Passing Though	35	27	28	14	59	49	50	40
Business	12	9	6	3	7	5	8	5
Shopping	15	5	11	1	6	0	7	1
Convention/Meeting	3	2	2	1	2	1	2	2
Other		5		3		3		3
		<u>100</u>		<u>100</u>		<u>100</u>		<u>100</u>

Source: 1993 Nonresident Travel Survey, ITRR

Table 7: Attraction of Montana as a Vacation Destination, by Nonresident Vacation Travelers during 1993

Vacation Attraction:	Statewide		Glacier County		Deer Lodge		Livingston	
	%		%		%		%	
	One Attraction	Primary Attraction	One Attraction	Primary Attraction	One Attraction	Primary Attraction	One Attraction	Primary Attraction
Scenery/Landscape	77	53	86	64	79	58	81	56
Wildlife Viewing	43	4	50	3	46	6	49	5
Historic Sites	28	6	28	3	30	6	31	6
Camping	21	3	26	3	21	3	21	3
Fishing	12	5	10	2	12	3	12	4
Hiking	14	1	25	2	12	0	15	1
Skiing	4	4	2	1	4	3	4	4
Snowmobiling	4	3	0	0	3	2	4	4
Other*		21		22		19		17
		<u>100</u>		<u>100</u>		<u>100</u>		<u>100</u>

Source: 1993 Nonresident Travel Survey, ITRR

* Other included Yellowstone, Glacier and other national landmarks; family events; golf; gambling etc.

Table 8: Recreation Activity Participation for Visitors to Montana during 1993

Recreation Activity:	Statewide %	Glacier County %	Deer Lodge %	Livingston %
Driving for pleasure	46	77	44	49
Viewing wildlife	41	66	42	49
Nature photography	24	49	25	29
Visit Yellowstone N.P.	24	35	26	37
Visiting family and friends	23	20	22	24
Historic/interpretive sites	20	34	23	23
Visiting Glacier N.P.	16	74	14	15
Museums	15	26	16	18
Picnicking	15	29	15	16
Visit a National Forest Area	14	26	12	17
Camp at developed/fee site	14	30	15	16
Day hiking in wildlands	13	30	12	14
Gambling	10	10	10	10
Visit a State Park	8	16	9	9
Shopping	27	34	22	27
Visit other National Park areas	8	13	8	10
Fishing	8	10	7	7
Traveling historic trails	7	16	6	8
Nature study	6	13	5	6
Swimming	5	9	4	6
Attend special event, festival	5	5	4	4
Visit a Designated Wilderness	4	11	4	5
Camp at a primitive site	4	8	3	4
Golfing	3	5	3	3
Snowmobiling	2	*	*	3
Powerboating	2	4	*	*
River rafting/floating	2	3	2	2
Did not participate in any activities	27	6	31	26

Source: 1993 Nonresident Travel Survey, ITRR

* These activities and others not listed have participation rates of 2% or less by visitors

Economic Characteristics

Information about the current number of visitors to an area and how much they spend is very useful for planning purposes. Table 9 summarizes visitation and expenditures in Montana and the three communities. In 1995 over three million visitor groups came through Montana. Of those, about half a million went through Glacier County, about one million through Deer Lodge and about one million went through Livingston. Looking at total expenditures, over \$1.2 billion was spent statewide in 1995. Glacier County and Livingston both received about the same share of that money but Glacier County only had half as many visitors. Deer Lodge generated only about half as much revenue as either of the other two, but had many more visitors pass through than did Glacier County and almost as many as passed through Livingston. Glacier County travelers had the highest average daily expenditures, the longest length of stay in Montana, the highest total Montana expenditures and the highest total expenditures in the sample community.

Table 9: Visitation and Expenditures of Nonresident Travelers to Montana

	Statewide	Glacier County	Deer Lodge	Livingston
Distribution of Expenditures in Sample Area:				
Hotel, Lodge, B&B %	17	24	25	26
Campground, R.V. Park %	1	3	4	2
Auto Rental %	1	0	0	0
Gasoline, Oil %	18	20	23	19
Restaurant, Bar %	18	20	17	13
Groceries, Snacks %	9	9	8	10
Retail Sales %	28	21	16	20
Miscellaneous Services %	7	3	8	10
Daily Travel Group Expenditures in Montana (1995 \$)	\$92	\$96	\$82	\$91
Total Travel Group Expenditures in Montana (1995 \$)	\$368	\$490	\$328	\$391
Travel Group Expenditures in Sample Area (1995 \$)		\$50	\$13	\$21
Total Travel Groups to Sample Area in 1995	3,370,000	531,000	960,000	1,167,000
Total Expenditures in Area in 1995 (1995 \$) (000)	\$1,240,000	\$27,000	\$12,000	\$25,000

Source: 1993 Nonresident Travel Survey, ITRR

Residents' Opinions about Montana, Their Community and Tourism

Residents of an area may hold a variety of opinions about tourism and other economic development. They may have perceptions of the specific impacts of tourism, both positive and negative. Opinions are a good measure of support for community and industry actions. As a community pursues tourism as a development strategy, the goals of that effort generally include an improved economy, more jobs for local people, community stability, and ultimately, a protected or improved quality of life for the

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

The resident opinion questionnaire addressed topics which create a picture of perceived current conditions and tourism's role in the community. The following general areas are covered in this section: a profile of the respondents; general support for tourism; influences of tourism on the state, communities, and personal well-being; the top advantages and main disadvantages of tourism development; degree of personal attachment to the community and community change; the current conditions of the state, communities, and personal well-being; and community-specific tourism questions.

To summarize results, several indexes were developed through a principal components factor analysis on the items within the indexes as outlined by De La Vina *et al.* (1994)³. This method statistically identifies the relative importance of each item's contribution toward the summary index, so that a weighted average can be computed for the combined items. Indexes were derived that summarize average 'support for tourism', 'perceived influence of tourism', 'perceived condition of well-being', and 'community attachment'. The indexes are presented in Tables 15, 18, 23, and 28 respectively. Analysis are presented to help identify respondent groups who were more or less influenced by, or supportive of tourism development in the community. Differences between groups are compared using the summary indexes for 'support for tourism' and 'perceived influence of tourism'.

Respondent Characteristics

A person's employment status, type of job, and economic work sector can all have an influence on personal well-being and on support for tourism. The more dependent a person is financially on the tourism industry, the higher the support. Table 10 shows employment status of the respondents. Table 11 lists the economic sector that the respondents worked in and Table 12 indicates the respondents' job title or type. Livingston respondents reported the highest unemployment level along with the greatest percentage of students and self-employed people. Deer Lodge had the greatest percentage of retired respondents. Service sector employment was the highest among all respondents, but especially so in Livingston where it accounted for 30% of the employed and self-employed respondents. Wood products were especially important in Deer Lodge, while education and oil and gas were major sectors in Glacier County compared to the other sample areas. Glacier County showed a greater percentage of respondents in the work force and the lowest percentage of retired respondents of any sample. The greatest number of statewide and Glacier County respondents reported being employed as professionals, followed by managers. In contrast, Deer Lodge and Livingston respondents were more likely to be managerial rather than professional.

³ De La Vina, L. Y., D. Hollas, J. Merrifield, and J. Ford (1994), "A principal components-based tourism activity index," *Journal of Travel Research*, Spring, pp. 37-40.

Table 10: Employment Status of Resident Respondents

Employment Status: (could be more than one)	Statewide %	Glacier County %	Deer Lodge %	Livingston %
Employed	49	50	39	42
Retired	33	24	42	31
Self-Employed	22	23	17	27
Homemaker	10	17	13	10
Unemployed	4	4	3	6
Student	2	2	2	4

Source: 1996 Resident Opinion Survey, ITRR

Table 11: Employment Sector of Resident Respondents

Employment Sector:	Statewide %	Glacier County %	Deer Lodge %	Livingston %
Services	20	21	17	30
Agriculture	13	15	5	6
Retail	11	15	14	19
Construction, Repair, Maintenance	9	2	9	5
Health Care, Medical Services	7	8	10	7
Education	7	12	4	4
Professional Services	7	5	2	4
Government	6	4	9	2
Transportation Services	4	4	1	5
Media, Communications	3	1	1	2
Logging, Forestry, Wood Products	2	0	15	4
Mining	2	0	5	2
Food Service, Restaurant	2	2	1	1
Automotive Services	2	1	1	1
Public Utilities	2	1	1	1
Oil and Gas	1	6	1	1
Visitor Services, Art, Entertainment	1	2	1	5
Manufacturing	1	2	1	2
Wholesale	0	0	0	0

Source: 1996 Resident Opinion Survey, ITRR

Table 12: Employment Type for Resident Respondents

Job Title:	Statewide %	Glacier County %	Deer Lodge %	Livingston %
Professional	30	32	17	20
Manager	20	27	38	39
Service Workers	12	4	4	6
Laborers	8	3	10	8
Clerical	7	10	8	6
Farmers	6	5	1	0
Craftsman	5	4	9	10
Sales	5	5	4	8
Transport	4	2	4	3
Farm labor	2	4	1	0
Armed Services	1	0	0	1
Operatives	0	4	5	0

Source: 1996 Resident Opinion Survey, ITRR

Opinions About Tourism and Its Influences

Respondents from the three communities were asked to rank the best opportunities for future economic development in their community and how much of a role tourism should play in the local economy. Those questions were not included on the statewide questionnaire so no results are reported for the state. Tables 13 and 14 present the results of those questions. Rankings varied by community as to what industries should dominate, but when responding to the role of tourism, the majority of respondents in all three communities believed it should play a role about equal to other industries. Only in Livingston did a quarter of the respondents feel that tourism should play a dominant role in the economy. Compared to other industries for economic opportunity, tourism was ranked number two in Glacier County, number two in Deer Lodge (agriculture tied for the number two ranking), and ranked number one in Livingston.

Table 13: Resident Ranking of Best Economic Opportunity in the Community

Economic Opportunity:	Glacier County	Deer Lodge	Livingston
Agriculture/Agribusiness	3.2	2.6	2.7
Tourism/Recreation	2.9	2.6	2.8
Manufacturing	2.3	2.0	2.5
Retail Sales	2.1	1.8	2.3
Wood Products	1.7	3.1	2.2
Mining	1.1	1.7	1.5
Other	0.7	0.2	0.3

Source: 1996 Resident Opinion Survey, ITRR

* Scores represent mean responses measured on a scale from 1 to 6.

Table 14: Residents' Opinions of The Role that Tourism Should Have in the Local Economy

Tourism's Role:	Glacier County %	Deer Lodge %	Livingston %
A minor role	23	23	21
A role about equal to other industries	54	58	55
A dominant role	23	19	25

Source: 1996 Resident Opinion Survey, ITRR

Support for Tourism Development

Respondents were asked to strongly agree, agree, disagree, strongly disagree or indicate don't know for a number of tourism related questions. The responses were then coded on a scale from -1 for strongly disagree to +1 for strongly agree. Results with a score of 0 would indicate neutral or balanced opinions, while negative scores would indicate disagreement with statements and positive scores would indicate agreement.

Some of the questions addressed general support for tourism or more specific aspects of tourism's benefits. Table 15 presents opinion scores for tourism support questions. Responses to all six of the tourism support questions were generally more favorable in Glacier County and Deer Lodge than they were in the statewide or Livingston samples. The statement "The overall benefits of tourism outweigh the negative impacts" is a good indication of overall support for tourism. Responses to this statement were favorable by all four sample groups, with the strongest agreement coming from Glacier County and the weakest agreement from Livingston. There was also strong support in all four samples for the State of Montana's tourism promotion efforts, and the belief that those efforts benefit communities financially. However, in all four samples the majority of respondents did not believe that they would personally benefit financially from increased tourism. Statewide and in Livingston, there was fairly strong concern that increasing tourism would not improve residents' quality of life, while opinions were about equally divided between agreement and disagreement in Glacier County and Deer Lodge. The other area of

difference was whether or not tourism would help the community grow in the right direction, with statewide and Livingston respondents slightly disagreeing and the Glacier County and Deer Lodge respondents agreeing fairly strongly.

A summary index of tourism support was developed from the individual items in Table 15. The index score represents a weighted average score of the six items in the table. The average tourism support index score varied by sample. All of the index scores indicated positive support for tourism development, with Glacier County respondents showing the highest support and respondents in the statewide sample showing the least support.

Table 15: Statements of Agreement with Various Aspects of Tourism Development

	Statewide	Glacier County	Deer Lodge	Livingston
Tourism promotion by the State of Montana benefits my community economically	.33	.50	.50	.52
To be competitive with other states, I support continued tourism promotion by the State of Montana	.28	.50	.50	.34
The overall benefits of tourism outweigh the negative impacts	.14	.33	.31	.12
Increased tourism would help my community grow in the right direction	-.09	.38	.31	-.03
If tourism increases in Montana, the overall quality of life for Montana residents will improve	-.27	.05	.03	-.24
I will benefit financially if tourism increases in my community	-.31	-.09	-.21	-.22
Tourism Support Index	.02	.25	.22	.08

Source: 1996 Resident Opinion Survey, ITRR

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

Perceived Influence of Tourism on Well-Being

Another indication of support for tourism is the perceived influence of tourism on various aspects of well-being. Respondents were asked to indicate whether tourism influenced a particular aspect of well-being positively, negatively or equally positive and negative. Responses were scaled from -1 to +1 with a score of 0 being equally positive and negative. Respondents were asked to evaluate tourism's influence at three scales including: the state of Montana, the respondent's community, and the individual respondent. Tables 16 - 18 present these evaluations by order of scale.

All four samples felt that tourism had a positive influence on Montana's economy and on cultural and historic preservation. All four samples also felt that tourism had a negative influence on Montana's highways and roads. Mixed results were found on the perceived influence of tourism on Montana's

environment, although all mean scores tended toward neutral. Respondents from Deer Lodge seemed to evaluate tourism’s influence on Montana most favorably while the statewide sample evaluated the influences most negatively.

The most positive aspects of tourism’s influence on communities were evaluated to be in the areas of museums and cultural centers, parks and recreation areas, and job opportunities. The areas of emergency services and education system received mixed evaluations, but tended toward neutral. Tourism’s influence was perceived as negative in terms of cost of living, safety from crime, community roads, and community infrastructure. In response to overall community livability Deer Lodge respondents felt that tourism’s influence was fairly positive, while statewide and Livingston respondents felt that it was fairly negative and Glacier County respondents evaluated it as having a balanced influence.

In terms of personal well-being, the most positive aspects of tourism were evaluated as being its influence on the respondents’ employment and financial situation. Mixed evaluations were obtained for tourism’s influence on other aspects of personal well-being. In general Glacier County and Deer Lodge evaluated the influences as being toward neutral, while the statewide and Livingston respondents expressed more negative concerns.

A summary index of tourism’s influence on well-being was developed from the individual items in Tables 16 - 18. The index score represents a weighted average score of the 20 items in the tables. The index scores for the statewide and Livingston respondents indicated a slightly negative overall perceived influence from tourism on well-being, while respondents from the other samples felt that tourism had a somewhat positive influence on well-being.

Table 16: Tourism’s Perceived Influence on Montana

Tourism's Influence on Montana's:	Statewide	Glacier County	Deer Lodge	Livingston
Economy	.47	.54	.57	.44
Cultural and historic preservation	.20	.32	.50	.23
Parks and recreation areas	.02	.22	.24	.02
Natural environment	-.10	.03	.05	-.09
Highways and roads	-.33	-.24	-.07	-.28

Source: 1996 Resident Opinion Survey, ITRR

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

Table 17: Tourism's Perceived Influence on the Community

Tourism's influence on the community's:	Statewide	Glacier County	Deer Lodge	Livingston
Museums and cultural centers	.42	.61	.80	.56
Parks and recreation areas	.14	.43	.47	.17
Job opportunities	.14	.25	.29	.18
Education system	-.03	.03	.07	-.04
Emergency services	-.05	.14	.16	.04
Overall livability	-.08	-.01	.20	-.11
Infrastructure (water, sewer etc.)	-.22	-.16	-.09	-.29
Safety from crime	-.29	-.25	-.11	-.38
Cost of living	-.31	-.14	-.15	-.37
Roads	-.43	-.31	-.21	-.42

Source: 1996 Resident Opinion Survey, ITRR

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

Table 18: Tourism's Perceived Influence on the Individual

Tourism's Influence on personal:	Statewide	Glacier County	Deer Lodge	Livingston
Employment situation	.05	.15	.03	.11
Financial situation	.01	.14	.04	.08
Overall happiness	-.07	.11	.09	-.05
Present housing	-.10	.02	-.03	-.16
Leisure time and activities	-.26	-.14	.00	-.26
Tourism Influence Index	-.04	.08	.12	-.02

Source: 1996 Resident Opinion Survey, ITRR

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

To further clarify the perceived benefits and costs of tourism development respondents were asked to provide the top advantage and main disadvantage of increased tourism in their community. This was an open-ended question with respondents providing their own thoughts and wording. The suggestions were then assigned to general categories for comparison. Table 19 lists the top advantages and Table 20 lists the main disadvantages of increased tourism. Responses to the top advantage were similar across samples, with about three-quarters citing economic benefits and most of the rest mentioning more jobs and employment opportunities. Responses to the main disadvantage did vary a little. In all samples traffic and congestion was the most frequently listed response. The statewide sample was especially

concerned about population growth, while Glacier County respondents did not list that concern as much as the other samples. Along with traffic, Glacier County respondents were especially concerned about increased prices, crime and pollution. Deer Lodge respondents frequently mentioned low paying jobs, seasonality and crowding.

Table 19: The Top Advantage of Increased Tourism in The Community

Top Advantage:	Statewide %	Glacier County %	Deer Lodge %	Livingston %
Local Economy, Money, Increased Business	75	79	79	73
Jobs, Employment	12	13	13	13
Limited Benefits to Some Business, Services, People	4	2	3	3
Grow, Develop, Improve Infrastructure, Services, Diversify	3	2	3	4
Meeting New People, Cross-Culture, New Ideas	2	1	1	1
Exposure, Recognition	2	0	1	1
Community Spirit, Pride, Appearance, Preservation	1	1	1	1
Increased Recreation Facilities, Opportunities	1	1	0	1
Taxes	1	1	0	1
Clean, Alternative Jobs, Development	0	0	1	2

Source: 1996 Resident Opinion Survey, ITRR

Table 20: The Main Disadvantage of Increased Tourism in The Community

Main Disadvantage:	Statewide %	Glacier County %	Deer Lodge %	Livingston %
Traffic, Congestion	38	46	28	50
Infrastructure, Public Service, and Road Stress	15	13	14	5
Increased Prices and Cost of Living	8	10	8	12
Tourists, Outsiders, Relocating to Area, Increased Population	12	4	9	7
Increased Crime	6	6	3	7
Creates Low Paying Jobs, Wages, Not Good Development Strategy	4	1	10	6
Pollution, Littering, Environmental Impacts	6	8	2	2
Crowded Recreation Areas, Crowding	5	2	6	2
Seasonal	0	5	7	3
Too Many Outsiders, Strangers	2	2	2	2
Community Change	1	1	2	3
Increased Taxes	1	2	3	1
No Income, Benefit, Tax Base to City or State	2	1	1	0
Benefits Only a Few, Separates Classes	0	0	5	1

Source: 1996 Resident Opinion Survey, ITRR

Community Attachment and Change

One of the outcomes of tourism or other types of economic development is community change. Changing communities can impact residents in a number of ways. Growing communities may provide more opportunities for well-paying jobs, while at the same time new workers may experience a shortage of housing. In general, larger communities are better able to absorb or buffer change than are smaller, more rural areas. Also, slow steady change is easier to adapt to than rapid unpredictable change. Changing communities force long-time residents to either adapt or leave. Community attachment may indicate the desire to stay in a community and either adapt to or resist the changing situation. The following tables will help to identify community attachment and concerns about change.

Table 21 indicates the type of community in which respondents lived. No one in the community samples lived in a community larger than 20,000 people, while 42% of the statewide sample lived in larger areas. The statewide sample also contained a larger portion of respondents living in rural areas than did the community samples. The majority of respondents from the community samples lived in towns of less than 20,000 people (as would be expected from the sampling method).

Table 21: Resident Respondents' Community Size

Community Type:	Statewide %	Glacier County %	Deer Lodge %	Livingston %
Rural Area	31	25	20	17
Town	28	75	80	83
Community of 20,000 or more	42	n/a	n/a	n/a

Source: 1996 Resident Opinion Survey, ITRR

One measure of attachment is the length of time and percentage of life spent in a community or area. Table 22 lists years in Montana and the community and how much of the respondent's lifetime that represented. Deer Lodge had, on average, the oldest respondents in the study and respondents who had lived in Montana the greatest length of time. As a portion of their life, Glacier County and Deer Lodge respondents had both spent 79% of their lives in Montana, while Livingston residents had spent 64% of their lives in Montana on average and statewide the average was 72%. A similar pattern was found at the community level with Glacier County residents having spent the greatest portion of their lives in their present community followed by Deer Lodge, Livingston, and statewide respondents.

Table 22: Respondents' Residency Characteristics

Residency:	Statewide	Glacier County	Deer Lodge	Livingston
Years lived in community	25	30	29	26
Years lived in Montana	38	42	45	34
Age (Mean Years)	53	52	56	51
Percentage of life spent in community	46%	56%	51%	47%
Percentage of life spent in Montana	72%	79%	79%	64%

Source: 1996 Resident Opinion Survey, ITRR

Community attachment is also measured by opinions about the community. Table 23 presents agreement or disagreement to several statements about tourism and community attachment. All of the samples generated positive community attachment scores regarding the desire to stay in the community. In response to how the future looks for the community, Livingston respondents perceived their future as the brightest, while Glacier County residents scored the future of their community as the least positive (although still positive) of the samples.

Table 23: Community Attachment Statements

	Statewide	Glacier County	Deer Lodge	Livingston
It is important that the residents of my community be involved in decisions about tourism	.67	.65	.67	.63
If I had to move away from my community, I would be very sorry to leave	.56	.34	.44	.42
Id rather live in my community than anywhere else	.42	.20	.34	.28
I think the future of my community looks bright	.19	.01	.13	.27
Decisions about how much tourism there should be in my community are best left to the private sector	-.08	-.10	-.14	-.22
Index of Community Attachment	.39	.18	.30	.31

Source: 1996 Resident Opinion Survey, ITRR

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

Community growth, one of the fundamental aspects of tourism development, must be addressed in planning. Respondents were asked if their community was changing, and if so, at what pace. Table 24 shows perceptions of growth in the community for each of the samples and Table 25 lists results of agree/disagree statements about tourism's role in community growth and change.

Most people felt that their communities were growing, although statewide and Livingston respondents were decidedly more convinced that their communities were growing. In addition, the majority of statewide and Livingston respondents felt that their communities were changing too fast, while respondents from the other two samples tended to believe that their communities were changing about right. Also many more respondents from the statewide and Livingston samples believed that the roads in their community were too congested.

While statewide respondents felt that their communities' roads were too congested, they did not believe that tourism was the major contributor to that congestion. Respondents from Livingston (who also thought their roads were congested) did believe that tourism caused the congestion. Responses to questions about population growth and overcrowding were similar to those of other tourism and growth related questions with the statewide and Livingston samples scoring the greatest perceived impacts. Livingston respondents also showed the strongest support for land-use regulations to help control growth, while Deer Lodge had the least support for such measures.

Table 24: Perceptions of Community Growth

	Statewide %	Glacier County %	Deer Lodge %	Livingston %
How is the population changing in your community?				
Growing	76	42	42	92
Decreasing	8	24	22	2
Not Changing	16	34	36	7
If changing, is your community changing..				
Too Fast?	53	20	12	51
About Right?	38	57	64	44
Too Slow?	9	23	25	5
Overall, are the roads in your community too congested?				
% Yes	50	20	5	46

Source: 1996 Resident Opinion Survey, ITRR

Table 25: Statements of Agreement about Tourism's influence on Community Growth

	Statewide	Glacier County	Deer Lodge	Livingston
I would support land-use regulations to help control the type of future growth in my community	.33	.26	.19	.47
Taking a vacation to Montana influences too many people to move to Montana	.26	.04	.09	.30
In recent years, the state is becoming overcrowded because of more tourists	.06	-.06	-.17	.17
Tourism is the major contributor to traffic congestion in my community	-.05	.11	-.11	.23

Source: 1996 Resident Opinion Survey, ITRR

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

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

When evaluating opinions about the benefits and costs of tourism development, it is helpful to have a perspective on the perceived conditions of various aspects of well-being. If a particular resource is in poor condition, any negative influence on it by tourism development would be serious, while tourism's mitigating influences would be very desirable. Respondents were asked to rate the condition of various

aspects of well-being on a scale of very good to very poor. Responses were scaled from -1 to +1 with a score of 0 being neither good nor poor⁴. Respondents were asked to evaluate conditions of well-being at three geographic scales including: the state of Montana, the respondent's community, and the individual respondent. Tables 26 - 28 present these evaluations by order of scale.

All sample groups agreed that the condition of Montana's natural environment was good, while the condition of the state economy was poor. Most people also felt that Montana's parks and recreation areas, and cultural and historic preservation were in good shape. Statewide and Glacier County respondents felt that Montana's highways and roads were in poor condition, while other respondents evaluated them neutral to somewhat good.

Respondents tended to rate most of the conditions of their community as good. Deer Lodge respondents rated their museums as very good and Livingston respondents rated their parks as being in very good condition. Of concern were the negative ratings on job opportunities, cost of living (except in Deer Lodge), community roads, and long-term development planning.

When rating personal conditions, all samples had positive average scores - especially in terms of overall personal happiness. Finances and access to local government were the lowest rated (still very positive) personal conditions.

An index of conditions of well-being was developed from the 22 combined items found in Tables 26 through 28. The index scores are presented at the bottom of Table 28.

Table 26: The Perceived Condition of Montana

The Condition of Montana's:	Statewide	Glacier County	Deer Lodge	Livingston
Natural environment	.61	.69	.65	.67
Parks and recreation areas	.30	.44	.40	.45
Cultural and historic preservation	.22	.23	.41	.26
Highways and roads	-.17	-.30	.04	.10
Economy	-.23	-.23	-.30	-.29

Source: 1996 Resident Opinion Survey, ITRR

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

⁴ Respondents were not given a middle point (0) to choose from. Neutral scores are a result of statistical analysis and reflect the mean.

Table 27: The Perceived Condition of the Community

The Condition of the Community's:	Statewide	Glacier County	Deer Lodge	Livingston
Emergency services (police, fire etc.)	.54	.41	.54	.47
Overall livability	.35	.24	.47	.31
Education system	.34	.41	.49	.13
Safety from crime	.30	.18	.49	.35
Parks and recreation areas	.29	.30	.30	.44
Museums and cultural centers	.23	.20	.61	.23
Infrastructure (water, sewer etc.)	.07	.01	.32	-.01
Cost of living	-.18	-.07	.07	-.17
Roads	-.30	-.32	-.20	-.07
Long-term development planning	-.33	-.27	-.21	-.45
Job opportunities	-.49	-.56	-.59	-.51

Source: 1996 Resident Opinion Survey, ITRR

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

Table 28: The Perceived Condition of the Individual

The Condition of your personal:	Statewide	Glacier County	Deer Lodge	Livingston
Overall happiness	.56	.54	.62	.49
Present housing	.44	.44	.42	.36
Leisure time and activities	.33	.26	.30	.31
Employment situation	.25	.27	.16	.19
Financial situation	.15	.11	.18	.12
Access to local government	.13	.17	.34	.22
Index of Conditions of Well-Being	.15	.13	.24	.16

Source: 1996 Resident Opinion Survey, ITRR

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

The Importance of Factors of Well-Being

To better understand what areas of tourism's impacts should be focused on, respondents were asked to rate the importance of various aspects of well-being. If we know that access to local government and the environment are perceived to be in poor condition, but only the environment is rated as an important aspect of well-being, then we have a better idea of where to focus development and planning efforts.

While items such as personal health and family relations are beyond the influence of tourism planning efforts, it is helpful to know the relative importance of those factors in relation to factors that tourism development can influence. Table 29 ranks the importance of various aspects of personal well-being. There were very few differences between sample groups. All respondents placed the most importance on health, family, and safety, while other items were given slightly less importance.

Table 29: The Perceived Importance of Factors of Well-Being

The Importance of to your current well-being:	Statewide	Glacier County	Deer Lodge	Livingston
Personal health	3.5	3.4	3.5	3.4
Relations with family and friends	3.3	3.4	3.4	3.3
Safety from crime	3.3	3.4	3.4	3.3
Education system	3.0	3.1	3.2	2.8
Financial situation	3.0	3.2	3.0	3.0
Natural environment	3.0	3.0	2.9	3.0
Crowding and congestion	2.8	2.6	2.6	3.0
Employment situation	2.8	3.1	3.0	2.7
Leisure time and activities	2.7	2.7	2.7	2.8
Housing	2.7	2.8	2.9	2.7
Access to government	2.3	2.2	2.4	2.4

Source: 1996 Resident Opinion Survey, ITRR

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

Identifying Vested Interests, Key Players, Constituents, Affected Citizens

In order to identify differences between various respondents, statistical tests were performed on the tourism support and tourism influence indexes shown in Tables 15 and 18 respectively. Tests for differences on the indexes between categorical groups were performed using independent sample T-tests. Correlation analyses were conducted between the indexes and several continuous variables like age and percent of life in the community. The summary indexes of community attachment and conditions of well-being were also tested for correlation with the tourism indexes.

T-Tests

T-tests identify significant differences in mean scores between different groups of people. All differences that were found to be significant at the .05 level or less were included here. The results are presented and interpreted without including the actual statistics.

The first T-tests were conducted to identify differences between the four sample groups. In general, the statewide and Livingston samples were significantly less supportive of tourism development and the respondents believed its influence on well-being to be significantly less positive than the Glacier County

or Deer Lodge respondents. There were no significant differences between the statewide and Livingston or between Glacier County and Deer Lodge respondents.

Differences were found between people that felt their communities were experiencing crowding, congestion or rapid change, and those that did not. Respondents from all of the samples that felt their community was growing too quickly scored significantly lower on both the tourism support and tourism influence indexes. Similarly, respondents from Deer Lodge, Livingston and statewide that felt their roads were too congested scored lower on the tourism support index. Those from Livingston and statewide who felt their roads were congested also scored significantly lower on the tourism influence index.

Employment status was another predictor of support for tourism. Respondents from Deer Lodge and statewide that were employed in one of the basic industries of mining, oil and gas, wood products, agriculture or manufacturing were significantly less supportive of tourism than other respondents. Basic industry employees from Deer Lodge also viewed tourism’s influence on their well-being less favorably than other respondents from Deer Lodge. In the statewide sample, respondents that reported being unemployed were less supportive of tourism than others. In Deer Lodge and Livingston, respondents that were employed by someone else were less supportive and viewed tourism’s influences less favorably than others. Self-employed workers in Livingston viewed tourism more favorably and were more supportive than others in the community, while students in Livingston were less supportive. In Deer Lodge, Homemakers scored higher on the tourism support index than did others from that sample. Finally, the statewide sample showed that females were more supportive of tourism, and viewed the influences more favorably, than did males in the sample. Table 30 shows the differences in tourism support based on employment status.

Table 30: Tourism Support Index by Employment Status of the Respondent

Employment Status	Tourism Support Index Score*			
	Statewide	Glacier County	Deer Lodge	Livingston
Employed in Services	.05	.25	.18	.07
Employed in Basic Industries	-.12	.04	.04	.09
Employed in Retail	.15	.41	.33	.42
Employed in Health Care	.00	.23	.36	-.02
Employed in Education	-.01	.21	.23	.25
Employed in Government	.24	.57	.00	.39
Homemaker	.07	.34	.37	.00
Unemployed	-.19	.17	.07	-.02
Retired	.03	.28	.24	-.02

Source: 1996 Resident Opinion Survey, ITRR

* Score is a composit index ranging from +1 (strong positive support) to -1 (strong negative support)

Correlation Analysis

Correlation analyses test for statistically significant positive or negative relations between two items. Correlation analysis was conducted between the tourism influence and support indexes and other noncategorical items. The results are presented without including the actual statistics from the analyses. All reported relations were statistically significant at the .05 level or less. Items that were tested for correlation with the tourism indexes included:

- Portion of life spent in Montana
- Portion of life spent in the present community
- Age
- Index of community attachment
- Index of perceived conditions of well-being

A significant negative correlation was found between the percentage of their life Glacier County residents had spent in Montana, and their score on the tourism support index. The more of their lives Glacier County residents had lived in Montana, the less they supported tourism. There were no significant relations found for percent of life in the present community or the respondent's age in any of the samples.

In all samples the analyses found significant positive correlations between community attachment and the perceived influence of tourism. Therefore, the more attached the respondent felt toward their community, the more favorable they viewed tourism's influences on their well-being. There were also positive relations between community attachment and support for tourism among all samples.

All samples contained significant positive correlations between the respondent's conditions of well-being and their score on the tourism influence index. The better their conditions, the more positively they viewed the influences of tourism on those conditions. All samples except residents of Glacier County also showed positive correlations between respondents' conditions of well-being and their support for tourism.

Community-Specific Question Results

Each community tourism assessment team was given the opportunity to include questions specific to their community in the questionnaire. Glacier County respondents were asked to indicate appropriate development policies for various sites on Blackfoot tribal lands (results available from ITRR), and to list one suggestion to entice travelers to stop and spend more time in the area (Table 31). The Deer Lodge assessment team included a question asking the greatest strength and biggest weakness of Deer Lodge as a tourism destination (Table 32), and a question about visiting the historical prison and ranch sites (Table 33). Livingston respondents were also asked about strengths and weaknesses (Table 34) and about the appropriate image for the town to portray to visitors (Table 35).

Table 31: The Best Opportunity to Entice Travelers to Spend More Time in Glacier County

Opportunity:	Percent Mentioned
Blackfeet, Indian Culture	17
Museums, Cultural, Archeological, Art	13
Rest Stop, Rest Area, Public Facilities	9
RV Park, Campground, Camping Facilities	9
Clean up area, address litter problem, face lift	9
Roads, Infrastructure	8
Glacier National Park	6
Special Event (Rodeo, L&C Days etc.)	6
Restaurant, Food Service, Eating Facilities	5
Lodging Facilities, Motel, Hotel	4
Tours, Guided Tours	4
Gambling	3
Retail Shopping	3
Visitor Information	3
Lewis and Clark history	2
Theme Park, Family Park	2

Source: 1996 Resident Opinion Survey, ITRR

Table 32: Strengths and Weaknesses of Deer Lodge as a Tourism Destination

Deer Lodge's Greatest Strength:	Percent Mentioned
Old Prison	20
Museums, All, in General	18
Location	12
Historical Sites, History	9
Prison and Grant Kohrs Ranch	7
Grant Kohrs Ranch	5
Car and Prison Museum Complex	5
Variety of Attractions, Entertainment	4
Small Town Style, Pace	4
The Local People	4
Scenery, Mountains, Out-of-Doors	3
Powell County Museum	2
Car Museum and Grant Kohrs Ranch	2
Car Museum	2
Parks	2
Restaurants	1
Deer Lodge's Biggest Weakness:	Percent Mentioned
Lack of attractions, activities, entertainment, services	27
Accommodations, RV park	12
Appearance of downtown	12
Shopping opportunities	12
Road, infrastructure, parking conditions	9
Advertising, publicity, signing, information	7
Local attitudes	7
Eating - restaurants	5
Location	3
City parks	2
The new prison	1
Environment, pollution	1
Local government, planning	1

Source: 1996 Resident Opinion Survey, ITRR

Table 33: Visitation of The Historic Prison and Grant Kohrs Ranch Sites

	Percent Yes
Visitation by Deer Lodge Residents:	
Have visited the Old MT Prison Museum Complex	92
Have visited the Grant Kohrs Ranch	88
Would recommend the Old Prison	97
Would recommend the Grant Kohrs Ranch	97

Source: 1996 Resident Opinion Survey, ITRR

Table 34: Strengths and Weaknesses of Livingston as a Tourism Destination

	Percent Mentioned
Livingston's Greatest Strength:	
Location near Yellowstone	45
Scenic Beauty, Natural Setting, Environment	28
Recreation Opportunities	11
Fishing	8
Downtown Area	2
Historic, Cultural Resources	2
Services	2
Local People	2

	Percent Mentioned
Livingston's Biggest Weakness:	
Lack of Activities, Entertainment, Opportunities	20
Infrastructure, Roads, Parking	15
Accommodations, Restaurants, Services	14
Traffic and Congestion	12
Garbage, Pollution, Appearance	10
Wind, Weather, Climate	9
Shopping	8
Yellowstone National Park	5
Local Government, Planning	4
Local Attitudes	3

Source: 1996 Resident Opinion Survey, ITRR

Table 35: The Best Image for Livingston to Show Visitors

Livingston's Best Image:	Percent Mentioned
Fly fishing, recreation	39
Gateway to Yellowstone National Park	32
Frontier History (Calamity Jane, Jim Bridger)	15
Ranching (cowboys, rodeo)	9
Railroading	5

Source: 1996 Resident Opinion Survey, ITRR

Community Synopses

Glacier County

During 1995, Glacier County received 531,000 travel groups (1,274,400 persons) passing through. The groups averaged 4 nights in Montana and spent the greatest percentage of those nights in hotels. About 14% of those nights were spent in Glacier County outside of the national park. Travelers through the county were most likely to be from Alberta, California or Washington respectively. The nonresident travelers had relatively high daily and total trip expenditures, and each group spent about \$50 on their trip in Glacier County. In 1995, nonresident travel brought \$27,000,000 into the Glacier County economy in direct expenditures.

Glacier County residents showed high overall support for tourism development. The most positive perceived aspects of tourism for the community were its influence on museums, cultural centers, parks and recreation areas, while the most negative perceived aspects were its influence on roads and safety from crime. Frequent concerns were expressed regarding the condition of Glacier County's roads, infrastructure and litter problems.

Glacier County residents felt that the most appropriate commercial developments on the Blackfoot Reservation would be focused in the communities, while natural areas such as lakes would be better left in their present condition. The best opportunities for increasing visitor stays in the area were thought to be the Blackfoot culture and the area's museums, archeology, art and culture in general.

Glacier County residents had lived in Montana and Glacier County the majority of their lives, yet they showed relatively low community attachment as measured by the community attachment index- meaning they would probably be more likely to move away than would residents from the other samples. The residents felt that their community was growing about right, that the roads were not too congested, and that tourists were not responsible for traffic conditions. The residents scored low on their perceived conditions of well-being, with concerns about highways and roads, job opportunities and the general economy. Service, retail and government employees were more supportive of tourism than others.

Table 36 provides a comparison of perceived conditions by Glacier County residents and perceived influences from tourism on those conditions. The items are ordered according to perceived importance with the most important items at the top of the table. It may be helpful to evaluate this table as an indication of the benefits and costs of tourism development in the community. From this table it can be seen that ‘safety from crime’ was very important and was ranked in good condition but it was thought that tourism’s influence would be very negative. The ‘cost of living’ was also a problem area, and tourism was thought to increase the problem. These two items along with the condition of highways and roads showed the greatest potential for serious problems associated with increased tourism. Based on these comparisons, the greatest benefits from tourism would likely come in the areas of an improved economy and enhanced job opportunities. These items were rated in poor condition, but it was thought that tourism would significantly improve them.

Table 36: Glacier County Condition/Influence Comparison

Item	Relative Importance Rank	Condition Score +	Influence Score #
Emergency services (police, fire etc.)	1	.41	.14
Safety from crime	1	.18	-.25
State Economy	2	-.23	.54
Cost of living	2	-.07	-.14
Personal Financial situation	2	.11	.14
Community Education system	3	.41	.14
Job opportunities	3	-.56	.25
Personal Employment situation	3	.27	.15
Overall personal happiness	3.7*	.54	.11
Overall Community livability	3.7*	.24	-.01
State Highways and roads	3.7*	-.30	-.24
Community Roads	3.7*	-.32	-.31
Infrastructure (water, sewer etc.)	3.7*	.01	-.16
Natural environment	4	.69	.03
Present housing	5	.44	.02
State Parks and recreation areas	6	.44	.22
Community Parks and recreation areas	6	.30	.43
Cultural and historic preservation	6	.23	.32
Museums and cultural centers	6	.20	.61
Personal leisure time and activities	6	.26	-.14

Source: 1996 Resident Opinion Survey, ITRR

* Those items that were not ranked for importance by respondents were assigned the mean rank

+ Scores represent conditions measured on a scale from 1 (Very Good) to -1 (Very Poor)

Scores represent influences measured on a scale from 1 (Positive) to -1 (Negative)

Deer Lodge

The community of Deer Lodge saw 960,000 nonresident travel groups (2,208,000 individuals) pass through the area in 1995, even though the majority never got off of the interstate. The travelers spent three nights in Montana and were most likely to stay in a hotel in Missoula, Billings, Bozeman or Butte respectively. Almost a third of the travelers were from Washington. Deer Lodge travelers were most likely to be just passing through the state and a considerable percentage were on vacation. The travelers had low average daily and total trip expenditures and only left \$13, on average, in the Deer Lodge economy. In 1995, nonresident travel generated \$12,000,000 in direct expenditures for the Deer Lodge economy.

The sample of respondents from Deer Lodge indicated a very high percentage of retired residents (42%). The residents scored high on their support for tourism development. Residents especially felt that tourism had a positive influence on the community's museums and cultural centers. They also felt that tourism positively influenced conditions of their parks and job opportunities. The greatest concerns were expressed toward impacts on the roads, cost of living and housing, and safety from crime.

The greatest strengths of Deer Lodge for tourism development were thought to be the Old prison, the museums in general and the location of the community. The biggest weaknesses were seen as the lack of attractions, activities, entertainment and visitor services. Most of the residents indicated that they had visited the local historical attractions and would highly recommend them to their out-of-town guests.

Deer Lodge respondents were long-time Montana residents, but had spent somewhat less of their lives in the community. However, they had a fairly high level of community attachment. The respondents tended to be somewhat older and more likely to be retired than those from the other samples. The community is perceived to be either stable or growing at a comfortable rate. Deer Lodge respondents reported high satisfaction with their personal well-being. Many comments indicated that the downtown area could benefit from a facelift.

Table 37 provides a comparison of perceived conditions by Deer Lodge residents and perceived influences from tourism on those conditions. The items are ordered according to perceived importance with the most important items at the top of the table. It may be helpful to evaluate this table as an indication of the benefits and costs of tourism development in the community. From this table it can be seen that 'cost of living' and the 'condition of highways and roads' show high potential for negative impacts from tourism. In contrast, the economy and job opportunities (both ranked high in importance) showed great potential for improvement through tourism development

Table 37: Deer Lodge Condition/Influence Comparison

Item	Relative Importance Rank	Condition Score +	Influence Score #
Emergency services (police, fire etc.)	1	.54	.16
Safety from crime	1	.49	-.11
Education system	2	.49	.07
State Economy	3	-.30	.57
Cost of living	3	.07	-.15
Job opportunities	3	-.59	.29
Personal Employment situation	3	.16	.03
Personal Financial situation	3	.18	.04
Overall personal happiness	3.5*	.62	.09
Overall community livability	3.5*	.47	.20
State highways and roads	3.5*	.04	-.07
Community roads	3.5*	-.20	-.21
Infrastructure (water, sewer etc.)	3.5*	.32	-.09
Natural environment	4	.65	.05
Present housing	4	.42	-.03
State parks and recreation areas	5	.40	.24
Community parks and recreation areas	5	.30	.47
Cultural and historic preservation	5	.41	.50
Museums and cultural centers	5	.61	.80
Personal leisure time and activities	5	.30	.00

Source: 1996 Resident Opinion Survey, ITRR

* Those items that were not ranked for importance by respondents were assigned the mean rank

+ Scores represent conditions measured on a scale from 1 (Very Good) to -1 (Very Poor)

Scores represent influences measured on a scale from 1 (Positive) to -1 (Negative)

Livingston

Out of the 3.4 million visitors to Montana in 1995, about a third (1,167,000 groups or 2,684,000 individuals) passed through the Livingston area. They spent 3 nights in Montana (4% of all nights they spent in Montana were in Livingston). The visitors were most likely to be from Washington and three-quarters of them had been to Montana before. The travelers spent an average of \$21 per group in Livingston, accounting for an infusion of \$25,000,000 to the local economy in 1995.

The residents of Livingston expressed mixed feelings about their support for tourism development and scored considerably lower on the tourism support index than the other CTAP communities. The residents also scored negatively on the perceived influence of tourism toward their overall well-being.

Major concerns about tourism's influence on the community included impacts to roads, safety from crime, cost of living, and infrastructure. Through several measures including comments, it seems that one of the major concerns with tourism was increased traffic congestion.

The greatest strengths of Livingston for tourism development were perceived to be its location near Yellowstone National Park and its scenic beauty and natural setting. The biggest weaknesses were thought to be a lack of activities, entertainment, or other opportunities and the condition of the roads, parking, infrastructure, visitor services and traffic. The best image for Livingston to portray was thought to be fly fishing/recreation and the gateway to Yellowstone.

The residents of the community had lived in Montana and their community for a shorter period than respondents from the other samples. However, they scored fairly high on the community attachment index - indicating their commitment to stay and their desire to improve local conditions. Most residents thought that Livingston was growing, and a majority felt that it was growing too fast.

Table 38 provides a comparison of perceived conditions by Livingston residents and perceived influences from tourism on those conditions. The items are ordered according to perceived importance with the most important items at the top of the table. It may be helpful to evaluate this table as an indication of the benefits and costs of tourism development in the community. The table indicates that negative impacts are likely to occur in the areas of 'safety from crime', 'cost of living', 'highways and roads', and 'personal leisure time and activities'. The only serious improvement in conditions that was perceived to occur from increased tourism was the 'state economy'.

Table 38: Livingston Condition/Influence Comparison

Item	Relative Importance Rank	Condition Score +	Influence Score #
Emergency services (police, fire etc.)	1	.47	.04
Safety from crime	1	.35	-.38
Natural environment	2	.67	-.09
State economy	2	-.29	.44
Cost of living	2	-.17	-.37
Personal financial situation	2	.12	.08
Overall personal happiness	2.7*	.49	-.05
Overall community livability	2.7*	.31	-.11
State highways and roads	2.7*	.10	-.28
Community roads	2.7*	-.07	-.42
Infrastructure (water, sewer etc.)	2.7*	-.01	-.29
State parks and recreation areas	3	.45	.02
Community parks and recreation areas	3	.44	.17
Cultural and historic preservation	3	.26	.23
Education system	3	.13	-.04
Museums and cultural centers	3	.23	.56
Leisure time and activities	3	.31	-.26
Job opportunities	4	-.51	.18
Present housing	4	.36	-.16
Employment situation	4	.19	.11

Source: 1996 Resident Opinion Survey, ITRR

* Those items that were not ranked for importance by respondents were assigned the mean rank

+ Scores represent conditions measured on a scale from 1 (Very Good) to -1 (Very Poor)

Scores represent influences measured on a scale from 1 (Positive) to -1 (Negative)

Summary of Resident Opinions

Residents of an area may hold a variety of opinions about tourism and other economic development. Understanding residents' perceptions of the conditions of their surroundings and tourism's influence on those conditions can provide guidance toward appropriate development outcomes.

The statement "The overall benefits of tourism outweigh the negative impacts" is a good indication of overall support for tourism. Responses to this statement were favorable by all four sample groups, with the strongest agreement coming from Glacier County and the weakest agreement from Livingston. However, in all four samples the majority of respondents did not believe that they would personally benefit financially from increased tourism. Statewide and in Livingston, there was fairly strong concern that increasing tourism would not improve residents' quality of life, while opinions were about equally

divided between agreement and disagreement in Glacier County and Deer Lodge. The other area of difference was whether or not tourism would help the community grow in the right direction, with statewide and Livingston respondents slightly disagreeing and the Glacier County and Deer Lodge respondents agreeing fairly strongly.

A summary index of tourism support was developed from the individual items in Table 15. The index score represents a weighted average score of the six items in the table. The average tourism support index score varied by sample. All of the index scores indicated positive support for tourism development, with Glacier County respondents showing the highest support and respondents in the statewide sample showing the least support. T-tests were conducted to identify differences between the four sample groups. In general, the statewide and Livingston samples were significantly less supportive of tourism development and the respondents believed its influence on well-being to be significantly less positive than the Glacier County or Deer Lodge respondents. There were no significant differences between the statewide and Livingston or between Glacier County and Deer Lodge respondents.

Differences were found between people that felt their communities were experiencing crowding, congestion or rapid change, and those that did not. Respondents from all of the samples that felt their communities were growing too quickly scored significantly lower on both the tourism support and tourism influence indexes. Similarly, respondents from Deer Lodge, Livingston and statewide that felt their roads were too congested scored lower on the tourism support index. Those from Livingston and statewide who felt their roads were congested also scored significantly lower on the tourism influence index.

Employment status was another predictor of support for tourism. Respondents from Deer Lodge and statewide that were employed in one of the basic industries of mining, oil and gas, wood products, agriculture or manufacturing were significantly less supportive of tourism than other respondents.

Comments

The following section consists of the verbatim comments that were received from statewide survey respondents. On the back of the questionnaire, respondents were given the opportunity to offer support, suggestions, concerns, and other comments about tourism. These comments are very important to the Community Tourism Assessment process in many ways. Comments represent feelings of the respondents that are difficult to assess using the quantitative methods. Therefore the comments provide additional insight. Fortunately, many of the respondents offered usable comments, providing a good representation of the variety of feelings held by the communities' residents. Comments were received from about 45% of Glacier County respondents, 42% of Deer Lodge respondents, 59% of Livingston respondents, and 30% of the respondents from the statewide sample. Comments from individual communities are not included here, but were provided to the community assessment committees and can be requested as a supplement from ITRR.

The comments should be studied carefully by the assessment committees and other decision makers. These comments provide a good read on the true pulse of the residents and offer many constructive suggestions for appropriate improvements to their communities. The comments are arranged in four categories represented by the symbols + , +/- , - , and 0 . The categories are defined loosely as follows:

- + Comments generally favoring tourism development or offering suggestions for improving tourism in the community. The suggestions were interpreted as the respondents idea of a positive

contribution to improvement, though some may contradict. For example, one respondent may have felt that more wilderness would be beneficial to tourism while another suggested that less wilderness would offer more opportunities. In other cases the comments may sound negative, as in 'downtown is dirty', but were interpreted as 'cleaning up downtown would improve tourism', and thus were supportive of tourism.

+/- These comments usually raised concerns as well as offering suggestions or support. Often respondents offered opinions about appropriate and inappropriate types of tourism. Other respondents acknowledged the benefits of tourism but were worried about growth or inappropriate development. Some respondents identified current problems associated with tourism and offered solutions. In some ways this category of comments are the most insightful because they represent acknowledgment of the benefits and the costs; they represent middle of the road and compromise; or they present problems and solutions.

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

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

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

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

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

Statewide Sample

- + Missoula needs better convention facilities. Conventioneers bring money and knowledge but don't crowd the trails.
- + Montana is great for its open space. We need camping areas so people don't just camp anywhere and leave a mess. Take better care of our highways and streets.
- + More fishing places.
- + Many interesting events would not take place in our community without tourism. My children would never be exposed to new cultures without tourists, US and foreign.
- + The road from Helena to Canyon Ferry Lake is a disgrace. With this lake being the most fished in Montana and the eagle viewing below Canyon Ferry Dam this road is used extensively. We do very little to promote this lake (i.e. viewing points, signs, historic items, public facilities).
- + Tourism is fine if the State would improve highways and scenic stops.
- + I would like to see the tourists pay for some of the services and upkeep through what they spend in the state, maybe through a resort or sales tax.
- + ORV development would be appropriate.
- + I feel we could take advantage of the tourist traffic that passes through here on their way to Canada and Glacier Park. Good facilities for RVs would be in demand and very profitable if managed properly. A museum would be nice to promote our history.
- + I would like to see more museums and performing arts theaters. I feel we would benefit from a sales tax in Montana. This state has a lot to offer tourists recreation-wise. It is a beautiful state.
- + Montana should strongly promote its recreation, historic and scenic areas. We should find new and inventive ways to tax tourists, etc., to help relax the gas and property taxes and recreational fees that Montanans continuously have to pay.
- + We need more local jobs. We need an RV park with hookups for tourists. Need to get people to stay and spend money in Fort Benton. We have 2 museums that are great, a nice park and many extras. We need to update our legal system so we can ALL be safe.
- + Any type of development and growth would benefit Helena, bringing better shopping and financial growth.
- + More advertising where the little business person can profit.
- + If it weren't for tourists this state would be in bad shape. We should have a state sales tax with property and income tax relief.
- + Promote hunting, fishing and back country trips.
- + A sales tax would increase the economic benefits derived from tourism. This tax source could be used to improve roads and infrastructures in our state.
- + We have a nice museum here and Frontier Days is a good event. Perhaps it should be promoted more. We should have more affordable housing.
- + Better street conditions and beautification projects are needed.
- + Tourism provides an overall increase in the local economy. It provides many seasonal entry level jobs which would not otherwise be available. Communities need increased tourism promotion funds such as the current bed tax. The State Dept. of Commerce does a fine job with tourism promotion. However, if individual communities had more resources, the overall impact would greatly increase. One major problem

we face with tourism is that it is difficult for tourists to fly into and around Montana. There are very few flights to and from Montana; we have a very poor air service.

- + I would love Zoo Montana to thrive for tourists and local people.
- + Charge each person who enters the state \$200 (if no Montana Drivers License).
- + Tourism helps our local businesses sell their merchandise. It has been the reason to establish Montana Made items and outlets. The tourists can spend their leisure time fishing, hunting and going on tours, which provides us with jobs.
- + Tourism is a positive thing in our community. Growth unrelated to tourism is going to have a negative impact on tourism by way of unsightly developments and the visual damage to "view sheds" in this area.
- + Tourists do not mix well with two lane roads and truck traffic. Rules and regulations need to be put in place for safety on our lakes and rivers. Mobile home parks and camping are needed. Merchants should make an effort to have Saturday work hours and partial Sunday hours (at least realtors and variety stores).
- + I would like to see more jobs so my children could stay in Montana.
- + Tourism is fine but doesn't have much influence on our small community.
- + The restaurants, gas stations, motels and RV parks do well from tourists because we are a stop-over for people traveling to other destinations. Shelby's location makes it a perfect place to develop a state historical park dedicated to the eastern Montanan's homesteader history.
- + Montanans need to be more hospitable to visitors. We have natural attractions but need to be more pleasant and willing to show them.
- + Lake Elwell/Tiber Dam area should be turned over to private development of shore line cabins, etc.
- + Keep tourism on a positive note. Promote emphasis regarding respect for the state's environment and the preservation of pride that most Montanans have in their state.
- + Tourism center and rest area on Eastern edge of I-90.
- +/- I feel that most Montanans like living in a quiet state. We are like isolationists. We don't want people moving in and telling us how to run our state, but we know that we need the money that tourism brings into Montana.
- +/- Would like to see mandatory auto insurance tax applied to fuel and the profit for insurance of autos eliminated, abolished or decreased, etc. Too much biasing in the present system. I see people getting rich with tourism but I also see a greater division between the rich and the low income resulting in biasing laws that complicate more than they solve.
- +/- Tourism costs local people year round. Taxes for buildings and attractions, gas or fuel are unnecessary. Montana is a beautiful state! People will come without the burden of extra taxes and costs.
- +/- Tourism is good to a point, but this is a quiet retirement town and I'm not sure a mass of tourists is in everyone's best interest.
- +/- Our community must cater to tourism but state financial mechanisms are not in place to target business/convention markets on a regional or national basis. We cannot compete against other states because we do not invest state bed tax dollars in local events. Instead locals must raise funds to sponsor convention events.
- +/- I am not unhappy with tourists. I want them to enjoy Montana without added expenses to nature or resident Montanans.
- +/- We need activities for young and older people. We could use flea markets, tourists are interested in buying these things. With lack of buildings, poor economy, highways and roads in bad repair tourists

aren't interested in coming here. With the hate groups in the area, tourists are scared to come here and I can't say that I blame them!

- +/- I don't mind the tourists, I just don't like it when they all move here. They buy up the land in droves and cause our taxes to go sky high, but they double their money when they turn around and sell the property.
- +/- The tourists would be all right if they wouldn't crowd the roads like they have been, especially Hwy. 93.
- +/- The growing population and increased amount of tourism will be a detriment to the things that Montanans love most. If tourism is promoted, it should be toward already populated areas and NOT toward such places as our rivers, streams, lakes, and wilderness. These are places that we should try to preserve for use by Montanans.
- +/- I would promote historical sites such as mines, ghost towns, calvary fort locations, battlefields. I would not promote easier access to mountain areas where it would harm existing wildlife. Montana needs good paying industrial jobs. Property taxes must go down to invite outside business to this state. Tourism jobs are seasonal and low paying. People in this state cannot live on these wages.
- +/- Tourism is great. It brings in income and lets people see our state, but forcing wolves and bears down our throats so people can see them from the road is not. Let's keep our own individuality as a state. Montana is beautiful, let's keep it that way!
- +/- More recreational facilities would attract people and boost our economy. We have a museum and a state park, but maybe more sites such as a waterslide or go-carts would increase the number of people that come to our community. The cost of living for the natives may be in jeopardy, though. Tourists moving to Montana and congesting the state is also a worry.
- +/- The main tourists draws are already being advertised well and as a small town we can only handle a given amount of people at a time. We really couldn't accommodate any more.
- +/- I'm glad we've been discovered by other people, but people moving into Montana are bringing goofy ideas and are bent on changing the things I like about us. Given this, my first reaction is to reject all of them.
- +/- Tourism is a double-edged sword. If the state is going to increase tourism they need to be aware of the fact that the eastern border of Montana is at Alzada, not Billings.
- +/- Native American areas need to be developed for tourists in ways that Native Americans would like to, not white man ways.
- +/- Attractive, small cities become overbuilt and lose their charm once they're discovered. Tourism and faulty planning are major factors of the problem. Tourism and growth can't be stopped, but can be made to serve more durable community values by more public participation in the planning process.
- +/- Montana is great the way it is. We will attract tourists naturally. We should protect our parks, lands and wildlife to the full extent. No economic growth is worth losing these precious things.
- +/- Tourist promotion is not necessary. It's OK if they come here, but let's not invite them.
- +/- We know that gambling raises revenue but the negative impact on the community far outweighs the need for money. Alcohol is also a negative influence. Positive influences are family promotion, well being of our children.
- +/- I am unsatisfied with the slow pace of growth management strategies in and around Missoula. We need greater awareness and commitment on the part of citizens and elected officials to address the serious long-term implications of development. Better rural and urban planning is needed. The state's natural environment should be better protected so as to attract eco-friendly tourism. It seems that many state officials and long-term residents take the environment for granted and under value the economic and aesthetic benefits of tourism.
- +/- Only minimum pay jobs arise from tourism. Tourists indirectly help by paying gas tax. I don't feel that sales taxes help as they cost the local people much more than any tourist spends. Bed taxes may help

some, but if I stay in state I still have to pay the same tax. Congestion in my area is growing and makes it difficult to get where I need to go.

- +/- We need more industry in Montana. People that move here after retirement or own vacation homes do not help the economy. They want to turn Montana into the place that they came from and not leave it the way it is. I would like to see Montana improve, but we need jobs if we are going to grow and still have a lovely state to live in. We need to keep the wolves and bears in check. There are lots of places that they could live rather than on our ranches.
- +/- We don't need single family dwelling communities filled with condos or trailer parks. Montanans should come before tourism. There aren't enough parks per neighborhood or on the lakes. Tourist industry jobs are very low paying. Limited tourism is OK but tourist dollars must be spent on maintenance of our infrastructures so we still have a good quality of life. The state should spend less money on the promotion of tourism.
- +/- We, as Montanans, don't like other people coming here for the advantages we can offer (such as scenery, climate, beauty) and then wanting to change it all. They want it to be like the place they left. It just doesn't make sense. Everyone has to work together to keep a state a great place to live in and enjoy.
- +/- I have no problem with increased tourism in the state, but only the upper class gets anything out of it. The lower classes are paying higher taxes and gas prices because of the tourism.
- +/- Tourism is OK as long as the rights and privileges of native Montanans are not forgotten. We should not have to pay bed tax when we stay in our own state. Our highways are very bad and can't handle the tourist traffic. It's great that they visit, but too much promotion from realtors is causing them to move to our great state when they should be going home.
- Too many out of state people are buying Montana. Soon, it won't be Montana. Personal experience shows they are greedy, lack morals, selfish and have the attitudes they are better people. It's a great place, that's why they come back and stay, but now where are all of the caring neighbors and honest businessmen?
- I feel we have enough tourists and don't need anymore.
- Montana's already had too much publicity - attracting too many people - both good and bad. Subdue the media and tourism advertising and concentrate on poor job opportunities, price-gauging in food, gas and housing. In other words tell it like it is...tell them to stay home!
- Without sales tax, tourism is subsidized by property owners.
- I would like to see Montana's ghost towns kept a secret.
- Tax dollars should not promote tourists nor industrial development.
- I think that Montanans should not have to pay the taxes on gasoline when it is supposed to be paid by the tourists.
- This town is trying to carry water in a basket. Too much talk, too little action. This city is in bad shape. Wages are too low and housing too high. People here are greedy. I don't think tourists are going to help all that much.
- Perhaps tourism brings in some revenue (i.e. motels, restaurants, gas) but I feel the disadvantages of bringing in outsiders far outweigh the benefits.
- Channel tourists into national parks if you must but not into state culture. If I wanted to live in a tourist community, I'd move to Bigfork or Ketchum.
- I feel the tourism industry does not get taxed as in other states for the use of car facilities and should somehow have to help support the load better.
- I feel Montana is on the threshold of losing the very thing that makes it the "Last Best Place," its natural environment. I will mourn the loss of such purity which deserves to exist merely for its own sake.

- The highway between Pleuna and Baker is very poor and causes extreme traffic hazards. Anyone that is not local has a very hard time driving on such a poor road.
- The town doesn't have adequate parking for the growing population not quality city water. The highways and county roads are torn up. Crime is increasing due to people from other areas moving in. The town is not as safe as it used to be.
- I can't say that I appreciate the entire mind set of tourists to be so frantic in the pursuit of leisure time. The lasting effects of tourism are disturbing. Population growth, buying up land causing land prices to sky rocket and taxes to become unbearable are all results of outsiders coming from back East or California and moving into the beautiful places where we live. The ranchers get driven off of the land as it becomes covered with houses and horses. The land they all thought was so beautiful will no longer exist except for Wilderness areas they will have to commute to!!
- There's too many people moving into Montana as a result of tourism. They want to change Montana into the kind of cesspool they left rather than assimilate into our community.
- There's too many people moving here from other states.
- Traffic is much busier and areas where we have fished and hiked in the past have so many people now that it is not enjoyable. The economic advantage of tourism is vastly over-rated. Tourism has not added one thing to my life and has taken many good things away.
- Our roads are currently in very bad repair and I'm not sure they'll hold up with all of the tourist traffic.
- The Flathead Valley's attractions are obvious and don't need more promotion. This area is nearly overrun with people, if it's not already. We don't need anymore ski mountains, golf courses or parks. Museums and most culture centers are a waste of time for tourists. That is not why they come to Montana. I would like to see the promotion and growth stop here.
- More casinos and gambling would be bad.
- We don't need to advertise for tourists on the state level.
- While tourism brings money into the state, it does very little in helping remedy the problem of permanent and temporary population influxes in Montana. I don't feel promotion of the tourists industry is warranted until this problem can be dealt with.
- Danger on highways, pollution of our rivers and parks, crowding, and disruption of privacy are all problems that result from tourism.
- Sometimes tourists limit resident usage of local resources. I believe I compete with out-of-staters for big game licenses and Smith River Floating Permits.
- Because tourists are moving here, our quality of life is diminishing. Montana will cease being what it is if everyone tries to make a piece of it their own.
- Although tourism generates a lot of money, the resulting jobs are mostly substandard wages. I think Montana puts too much emphasis on tourism. Our efforts should be directed toward more permanent, higher wage jobs. More emphasis on "value added" industries. Montana is a beautiful state. Tourism will take care of itself.
- When a tourist moves here it seems that although they come here because of our way of life, after they get here, they want to change it!
- Everything we make from tourism is spent on advertising or something else that does not benefit the state.
- Tourism promotes low paying jobs and does not make a stable economy.
- Don't up the prices during tourist season.

- Too many tourists.
 - If tourists are to be encouraged they must pay state revenue to balance the inconvenience. Currently, the only beneficiaries are service providers.
 - Local events that are advertised in tourism brochures are becoming too crowded and local residents are less likely to attend due to large crowds. We don't need any added attractions. The current cultural attractions are enough.
 - We need more industry and income to survive. They finally improved Lake Como and now it's a tourist trap. You have to reserve spaces and fight crowds.
 - Montana should get out of tourism promotion. Also, in order to own land in Montana a person should have to live in Montana.
 - I don't agree with the programs to reintroduce wildlife in areas around Montana. Tourists cause more expense in maintaining highways and local parks and only businesses profit. The taxpayers pay for this and the government puts higher gas taxes on us. Tourism has nothing but detrimental effects.
 - By depending solely on tourism for added income, Montana is always going to be controlled or influenced by outside states or people.
 - I would not like to see gaming or gambling promoted in my area, nor would I like to see hunting promoted in any area of Montana.
 - The more tourism there is, the lower the quality of life due to pollution, overcrowding and crime. We need more jobs that are not seasonal but full time.
 - Northwest Montana has the worst highways in the continental US Hwy. 93 and Hwy. 2 are already way too congested and there is no change in sight within the next 25 years. We should have toll booths on our highways to help in the funding of repairing and widening these highways. Our state highways are death traps!
 - I don't want tourism promoted in my area because soon it'll be all out-of-staters living here with no place for the true Montanans to go. I want Montana left the way it is. I don't want it to become a giant park full of tourists.
 - People visit Montana to get away from it all, but many decide to stay and bring with them all of the things they were trying to get away from. Montana has a strong and long standing heritage and a reputation for healthy living. People that move here fail to make the adjustments required to maintain the healthy lifestyle.
 - There have been hordes of people moving to our state from afar. They try to change the way of life in Montana to the way of life in the place that they're from. This is our state. They have no right to tell us how to live our lives. They should go back to where they came from.
 - Tourism causes low paying jobs and loss of industry. More people moving into Montana results in a higher cost of living.
 - Population increase due to tourists moving to the area put a big strain on schools, police, and hospitals. These sources have no chance to catch up on the demands.
- 0 Development must be planned without damage to private property rights.
- 0 Weather has some answers. Summer and fall are helpful, but the changes and extremes of spring and winter don't invite too many tourists.
- 0 The State is running all the little business's out of state. Workman's compensation and taxes are the problem for every community.
- 0 Our sense of safety in our community has disappeared. Jobs would bring in families and a better economy if its consistent and not seasonal.

- 0 We need some places for Montanans to enjoy exclusively.
- 0 Urban renewal tore down historic buildings so we should preserve the remaining ones.
- 0 I'm in favor of some type of tax to get money for the state.
- 0 We should stop the bed tax. What is the total environmental impact of tourism compared to other industries?
- 0 Any area that attracts non-residents on a temporary basis needs to be properly supervised.
- 0 I would not want development that pollutes the air or water.
- 0 Local national forests where locals can go for recreation, camping, hiking and motorsports.
- 0 Too late - the cats out of the bag!
- 0 Land prices for local people too high.
- 0 I hate to hear people talk about how the out-of-staters move here and take all the jobs.
- 0 The focus needs to be on increasing job opportunities. More high tech/high salary jobs are needed to raise the standard of living and bring much needed outside dollars into the urban centers.
- 0 Pow wows are the main tourist attraction here. Hwy. 2 goes through town so people are usually going through to somewhere else.
- 0 Some of the tourist dollars should go to the schools. Land and property taxes are too high and the education for our children is lacking.
- 0 No more Walmart/Costco outlet stores!

Appendix A - Statewide Resident Opinion Survey Instrument

Please include your comments:

Residents' Opinions About Montana, Their Community and Tourism

Your opinion counts...

Please place your completed questionnaire in the postage paid envelope provided and drop it in the mail to: ITRR, S.C. 443,
The University of Montana, Missoula, MT 59812

Thank You!

The Importance of Things that Contribute to Well-Being

Q 1: Not all factors are equally important in determining your overall well-being: some have great importance (either helping or hurting) and others have less importance. Please rate the **importance** of each of the following factors to your current well-being?

	Most Important	Very Important	Somewhat Important	Slightly Important	Not at all Important
a. Natural environment	4	3	2	1	0
b. Access to local government	4	3	2	1	0
c. Crowding and congestion	4	3	2	1	0
d. Financial situation	4	3	2	1	0
e. Employment situation	4	3	2	1	0
f. Leisure time and activities	4	3	2	1	0
g. Safety from crime	4	3	2	1	0
h. Education system	4	3	2	1	0
i. Housing	4	3	2	1	0
j. Personal health	4	3	2	1	0
k. Relations with family and friends	4	3	2	1	0

The Condition of Things that Influence Well-Being

Listed below are some factors that influence Montana, your community or rural area, and you personally.

Q 2: How would you rate the **condition** of Montana's ...

	Very Good		Very Poor	Don't Know	
a. Natural environment?	4	3	2	1	DK
b. Highways and roads?	4	3	2	1	DK
c. Parks and recreation areas?	4	3	2	1	DK
d. Cultural and historic preservation?	4	3	2	1	DK
e. Economy?	4	3	2	1	DK

Q 3: How would you rate the **condition** of your community's (or rural area's)...

	Very Good			Very Poor	Don't Know
a. Emergency services (police, fire etc.)?	4	3	2	1	DK
b. Museums and cultural centers?	4	3	2	1	DK
c. Parks and recreation areas?	4	3	2	1	DK
d. Job opportunities?	4	3	2	1	DK
e. Education system?	4	3	2	1	DK
f. Cost of living?	4	3	2	1	DK
g. Safety from crime?	4	3	2	1	DK
h. Roads?	4	3	2	1	DK
i. Infrastructure (water, sewer etc.)?	4	3	2	1	DK
j. Long-term development planning?	4	3	2	1	DK
k. Overall community livability?	4	3	2	1	DK

Q 4a: How is the population changing in your community?

1. GROWING 2. DECREASING 3. NOT CHANGING

b: **If changing**, is your community changing...

1. TOO FAST 2. ABOUT RIGHT 3. TOO SLOW

Q 5: Overall, do you think the roads in your area are too congested?

1. YES 2. NO

Q 6: How would you rate the **condition** of your personal...

	Very Good			Very Poor	Don't Know
a. Financial situation?	4	3	2	1	DK
b. Employment situation?	4	3	2	1	DK
c. Access to local government?	4	3	2	1	DK
d. Leisure time and activities?	4	3	2	1	DK
e. Present housing?	4	3	2	1	DK
f. Overall happiness?	4	3	2	1	DK

Tourism's Influence on Things that Contribute to Well-Being

Below are a series of questions about your opinion of tourism's influence on Montana, your community or rural area, and you personally.

Q 7: What influence does **tourism** have on Montana's...

	Positive	Both Positive and Negative	Negative	No Influence	Don't Know
a. Natural environment?	+	=	-	NI	DK
b. Highways and roads?	+	=	-	NI	DK
c. Parks and recreation areas?	+	=	-	NI	DK
d. Cultural and historic preservation?	+	=	-	NI	DK
e. Economy?	+	=	-	NI	DK

Q 8: What influence do you feel **tourism** has on your community's...

	Positive	Both Positive and Negative	Negative	No Influence	Don't Know
a. Emergency services?	+	=	-	NI	DK
b. Museums and cultural centers?	+	=	-	NI	DK
c. Parks and recreation areas?	+	=	-	NI	DK
d. Job opportunities?	+	=	-	NI	DK
e. Education system?	+	=	-	NI	DK
f. Cost of living?	+	=	-	NI	DK
g. Safety from crime?	+	=	-	NI	DK
h. Roads?	+	=	-	NI	DK
i. Infrastructure (water, sewer etc.)?	+	=	-	NI	DK
j. Overall community livability?	+	=	-	NI	DK

Q 9: What influence do you feel **tourism** has on you personally in terms of your...

	Positive	Both Positive and Negative	Negative	No Influence	Don't Know
a. Financial situation?	+	=	-	NI	DK
b. Employment situation?	+	=	-	NI	DK
c. Leisure time and activities?	+	=	-	NI	DK
d. Present housing?	+	=	-	NI	DK
e. Overall personal happiness?	+	=	-	NI	DK

Q 10: Please indicate the amount you agree or disagree with each of the following statements:

	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
a. I will benefit financially if tourism increases in my community.	SA	A	D	SD	DK
b. If I had to move away from my community, I would be very sorry to leave.	SA	A	D	SD	DK
c. I'd rather live in the community where I live now than anywhere else.	SA	A	D	SD	DK
d. I think the future of my community looks bright.	SA	A	D	SD	DK
e. Increased tourism would help my community grow in the "right direction".	SA	A	D	SD	DK
f. It is important that the residents of the community be involved in decisions about tourism.	SA	A	D	SD	DK

Q 10: (Continued)

	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
g. Decisions about how much tourism there should be in my community are best left to the private sector.	SA	A	D	SD	DK
h. Tourism is the major contributor to traffic congestion in my local area.	SA	A	D	SD	DK
i. I would support land-use regulations to help control the type of future growth in my local area.	SA	A	D	SD	DK
j. To be competitive with other states, I support continued tourism promotion by the State of Montana.	SA	A	D	SD	DK
k. Tourism promotion by the State of Montana benefits my community economically.	SA	A	D	SD	DK
l. Taking a vacation to Montana influences too many people to move to Montana.	SA	A	D	SD	DK
m. In recent years, the state is becoming overcrowded because of more tourists.	SA	A	D	SD	DK
n. The overall benefits of tourism outweigh the negative impacts.	SA	A	D	SD	DK
o. If tourism increases in Montana, the overall quality of life for Montana residents will improve.	SA	A	D	SD	DK

Q 11a: What is the top advantage of increased tourism in your community?

Q11b: What is the main disadvantage of increased tourism in your community?

Q 12: Now just a few questions about yourself...

a. Which of the following best describes the place where you live?

1. Rural area
2. Community of less than 20,000
3. Community of 20,000 or more

b. How long have you lived in your present community? _____ year(s)

c. How many years in total have you lived in Montana? _____ year(s)

d. What is your age? _____ years

e. Are you currently: (*circle all that apply*)

- | | |
|------------------|--------------|
| 1. Employed | 4. Student |
| 2. Self-Employed | 5. Homemaker |
| 3. Unemployed | 6. Retired |

f. If employed or self-employed, what is your **job title** (secretary, manager, salesperson, engineer, etc.)? _____

g. If employed or self-employed, what type of business do you work in (agriculture, retail, mining, service, etc.)? _____

h. Are you: Female or Male

i. What is your home zip code? _____

Q 13: We want to understand your opinions about tourism; please let us know what we've missed. Include comments related to tourism development that were not addressed above. For example, are there local places or events that you would or would not want promoted as tourist attractions? What types of development would or would not be appropriate in your community? (*Please write comments below and on the back page*)