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Exploring Tourism Development Potential: Resident Attitudes in Montana CTAP 2001-2002

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Executive Summary

This report presents information about Montana residents' opinions and attitudes regarding tourism in their communities and in the state as a whole. A mail-back questionnaire was administered to a randomly selected sample of 1,000 Montana households during October and November 2001. The survey sequence was initiated by mailing a pre-survey notice letter to all selected households. One week later, the survey mailing was followed by a reminder/thank-you postcard. Two weeks after mailing the postcard, a replacement survey was sent to those households who had not yet responded. The study achieved a response rate of 40 percent.

RESIDENT CHARACTERISTICS AND ATTITUDES REGARDING TOURISM DEVELOPMENT:

- Fifty-three percent of survey respondents were born in Montana. On average, they have lived in the state for 33 years.
- The education and service sectors were the most frequently cited sources of household income.
- Tourism/recreation ranked 5th behind services, technology, agriculture/agribusiness and wholesale/retail trade in terms of desirability of economic development. The majority feels that tourism should have a role in their community equal to that of other industries.
- Most respondents work in places that supply few or none of their products and services to tourists or tourist businesses.
- Contact with tourists is relatively infrequent, but the majority of residents enjoy meeting and interacting with tourists.
- Survey respondents are generally attached to their communities, and close to two-thirds feel the population in their community is increasing.
- In terms of quality of life, respondents feel that overall community livability, emergency services, parks and recreation areas, and safety from crime are in good to very good condition. They are generally dissatisfied with the availability of job opportunities.
- Tourism is thought to have the most positive impact on museums and cultural centers and on job opportunities. Safety from crime, condition of roads and highways, cost of living and local infrastructure are all expected to be both positively and negatively influenced by increased tourism, whereas traffic congestion is expected to be mostly negatively influenced.
- Survey respondents support tourism and tourism development but do not see a connection between this type of economic development and their own benefit.
- There is some concern among respondents that tourism jobs pay low wages. Crowding is not a concern, however, and less than half feel their recreation access is limited due to out-of-state visitors.
- There is tremendous support for land use regulation aimed at managing future growth.
- Respondents feel it is extremely important that residents are involved in decisions about tourism.
- Economic benefit is perceived to be the top advantage of tourism development, while people moving to the state is seen as the primary disadvantage, along with traffic and stress on infrastructure.
- Most respondents were at least aware of the Bed Tax and issues associated with it.
- Although most respondents indicated that they are at least somewhat informed about the travel industry in Montana, few have been exposed to information regarding the industry's impact on the state's economy, environment and quality of life.

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Introduction

This report provides a profile of resident attitudes toward tourism in Montana in the fall of 2001, and summarizes the results of a statewide survey administered in conjunction with the 2001/2002 Community Tourism Assessment Process (CTAP). The CTAP is conducted in three Montana communities each year, and involves the collaboration of Travel Montana, the University of Montana and the MSU Extension Service. The resident attitude questionnaire was administered to a statewide sample to serve as a comparison for individual community attitudes, as well as to monitor statewide resident attitudes over time. This report is published along with community results for Meagher and Phillips counties, as well as the City of Kalispell.

The resident attitude questionnaire addressed a number of topics that provide a picture of perceived current conditions and tourism's role in Montana communities. The following general areas are covered in this report: methodology; respondent characteristics; residents' attitudes and opinions about tourism and tourism development; issues related to the Lodging Facility Use Tax; and level of awareness of tourism and its impacts on the state.

Methodology

A mail-back questionnaire was administered to a sample of Montana residents in the fall of 2001. The distribution followed an updated version of Don Dillman's Total Design Method (TDM)¹, called the Tailored Design Method. The method of distribution is detailed below. It differs slightly from previous ITRR resident attitude surveys, but it is believed that these updates to the survey instrument and mailing sequence helped improve the study's response rate, which has dwindled in recent years. The response rate for this resident attitude survey was 40 percent.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a selected sample of 1,000 Montana households. The households were selected based on zip codes, ensuring that each Montana county received surveys in proportion to its population size. The notification letter informed recipients of the upcoming survey and alerted them to the appearance of a questionnaire in their mailbox in the near future. Shortly thereafter, a questionnaire was mailed to the same households, along with a cover letter stating in more detail the purpose and nature of the study. For the sake of random selection, the letter also requested that the adult in the household with the most recent birthday be the one to complete the questionnaire.

One week following the questionnaire mailing, a postcard was sent, serving the dual purpose of thanking respondents for their efforts if they had already returned their questionnaire, and urging those who had set it aside to complete and return it. After two more weeks, replacement questionnaires were sent to those households that had not yet responded to the first questionnaire mailing. Included this time was a different cover letter addressing concerns residents may have that so far had kept them from responding. The cut-off day for accepting returned questionnaires was four weeks following the last mailing. For a copy of the survey instrument, please see Appendix A.

A non-response bias check was not conducted at the conclusion of the survey effort. Such bias checks generally take the form of a telephone interview to determine if those in the sample who did not respond to the questionnaire differ on key issues from those who did respond. In this case, the key questions where opinions may have differed involve statements of support for tourism development. These key questions can only be answered after considering other questions asked in the survey. It was therefore not possible to develop a condensed telephone non-response questionnaire.

The sample was randomly selected from all Montana households, and represents each of the state's 56 counties proportionate to their population. The reader is cautioned to bear in mind that the results presented here are the opinions of 40 percent of the Montana residents polled (Table 1). It is assumed that respondents did not differ from non-respondents in their opinions. Because the age distribution of the survey respondents differed from the 2000 Montana census estimates of age groups², responses were weighted to more closely reflect the population of the state. Results presented in this report reflect the adjusted dataset.

Table 1: Sample Size and Response Rate

	Statewide
Resident questionnaires mailed out	1,000
Undeliverable questionnaires	189
Usable questionnaires returned	328
Response Rate	40%

¹ Dillman, Don A. 2000. *Mail and Internet Surveys: The Tailored Design Method*. John Wiley & Sons, Inc. New York, NY.

² MT Department of Commerce, Census and Economic Information Center. "Montana Census 2000 Population". Accessed at http://ceic.commerce.state.mt.us/C2000/SF12000/dp_mt_2000.xls.

Respondent Characteristics

Age and gender: Respondents were asked to indicate their gender as well as their age (Table 2).

Fifty-three percent of respondents were male while 47 percent were female. On a statewide level, the actual male/female ratio is approximately 50/50. The average age was 47 years, with the oldest respondent being 94 years old and the youngest being 18 years old.

Table 2: Age and Gender Characteristics

	Statewide
Percent male	53%
Percent female	47%
Average age	47 year
Youngest respondent	18 years
Oldest respondent	94 years

Residence: Survey respondents were asked if they were born in Montana, as well as how long they have lived in their respective communities and in the state (Tables 3 and 4).

A little over half (53%) of survey respondents were born in Montana. They have lived in their community for an average of 24 years and in the state for an average of 33 years. Twenty-one percent reported that they have lived in their community longer than 40 years, while 34 percent have lived in their community for 10 years or less.

Table 3: Residency Characteristics

	Statewide
Born in Montana	53%
Mean years lived in community	24 years
Mean years lived in Montana	33 years

Table 4: Community Residency

	Statewide
10 years or less	34%
11 to 20 years	16%
21 to 30 years	26%
31 to 40 years	13%
41 to 50 years	11%
51 to 60 years	3%
61 years or more	7%

Employment Status: A person's employment status, type of job and sector of employment can all influence support for tourism development in the state or in a community. Obviously, the more financially dependent a person is on the travel industry, the greater his or her support for tourism (Table 5).

The most common sources of household income for respondents were the service and education sectors (18% each). Other frequently cited sources of household income include health care (17%), government (16%), and professional and wholesale/retail trade (15% each). Approximately three percent of households reported that they derive some portion of their income from the travel industry. However, employees in the trade and service sectors may unknowingly be part of Montana's travel industry.

Table 5: Source of Household Income

	Percent of households deriving income from sector*
Services	18%
Education	18%
Healthcare	17%
Government	16%
Professional	15%
Wholesale/Retail trade	15%
Agriculture	13%
Construction	13%
Transportation, Communication or Utilities	8%
Clerical	7%
Finance, Insurance or Real Estate (FIRE)	6%
Restaurant/Bar**	6%
Forestry or forest products	5%
Armed services	4%
Travel industry	3%
<i>Other</i>	6%

* Households can get their income from more than one source.

** Contrary to common belief, the "Restaurant/Bar" category does not technically belong in the Service sector according to the Standard Industrial Classification index. It is part of the Wholesale/Retail Trade sector in table 16 as "Eating and Drinking Places". For clarity, it is included here as a separate category.

Place of residence: Respondents were asked to indicate if they live in town (urban setting) or out of town (rural setting) (Table 6).

Fifty-nine percent of respondents indicated that they live in town, leaving 41 percent who feel their residence to be rural.

Table 6: Place of Residence

	Statewide
In town (urban setting)	59%
Out of town (rural setting)	41%

Residents' Attitudes and Opinions About Tourism and Tourism Development

Tourism and the Economy

The local economy and the role tourism and the travel industry should have in it were key issues addressed in the survey. Residents were asked how important a role they felt tourism should have in their community's economy. In addition, they were asked to rank selected industries on a scale from 1 (most desired) through 8 (least desired), indicating which they felt would be most desirable for their community (Tables 7 and 8).

The majority (62%) of respondents feel that tourism should have a role equal to that of other industries in their local economy, while 20 percent think it should play a relatively minor role. A full 14 percent of respondents indicated that they feel tourism should have a dominant role in their local economy, while only 4 percent feel it should have no role.

When ranking tourism/recreation along with other industry segments according to economic desirability for their community, residents placed it 5th, behind services, technology, agriculture/agribusiness, and wholesale/retail trade.

Table 7: Role of Tourism in Local Economy

	Statewide
No role	4%
A minor role	20%
A role equal to other industries	62%
A dominant role	14%

Table 8: Most Desired Economic Development

	Rank	Mean*
Services	1	3.39
Technology	2	3.42
Agriculture/Agribusiness	3	3.60
Wholesale/Retail trade	4	3.71
Tourism/Recreation	5	4.22
Manufacturing	6	4.51
Wood products	7	5.68
Mining	8	7.09

* Scores represent mean responses measured on a scale from 1 (most desired) to 8 (least desired).

Dependence on Tourism

Residents were asked about the degree to which their place of work relies on tourists for its business (Table 9).

Only 7 percent of respondents indicated that they work in places that provide a majority of their products or services to tourists or tourist businesses, whereas the largest portion (48%) is employed in places that are perceived as providing no products or services to tourists or tourist businesses. Forty-five percent fall somewhere in the middle, indicating they work for businesses that provide at least part of their goods and services to tourists or tourist businesses.

Table 9: Employment's Dependency on Tourism for Business

	Statewide
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	7%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	45%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	48%

Interactions with Tourists

The extent of interaction between tourists and residents affects the attitudes and opinions residents hold toward tourism in general. In turn, an individual's behavior is a reflection of those same attitudes and opinions. Respondents were asked questions to determine the extent to which they interact with tourists on a day-to-day basis, as well as the quality of those interactions (Tables 10 and 11).

When asked about the frequency of their interactions with tourists, 16 percent of statewide respondents reported having frequent contact with tourists. Twenty-seven percent indicated that they have somewhat frequent contact, and 26 percent said they have somewhat infrequent contact with those coming to visit their community. Close to one-third of respondents (31%) indicated that they have infrequent contact with tourists visiting their community.

Over two-thirds (68%) reported that they enjoy meeting and interacting with tourists. Twenty-eight percent are indifferent with regards to meeting and interacting with tourists, while only 4 percent stated that they do not enjoy these interactions.

Table 10: Frequency of Contact with Tourists Visiting Community

Degree of Frequency	Statewide
Frequent Contact	16%
Somewhat frequent contact	27%
Somewhat infrequent contact	26%
Infrequent contact	31%

Table 11: Attitude Towards Tourists Visiting Community

Attitude	Statewide
Enjoy meeting and interacting with tourists	68%
Indifferent about meeting and interacting with tourists	28%
Do not enjoy meeting and interacting with tourists	4%

Community Attachment and Change

One measure of community attachment is the length of time and portion of life spent in a community or area. These statistics were reported earlier in the report (Table 3). Another measure is based on opinions that residents have about their community and perceived changes in population numbers (Tables 12, 13 and 14).

Community Attachment: To assess community attachment, respondents were asked to indicate their level of agreement or disagreement with each of four statements on a scale from -2 (strongly disagree) to +2 (strongly agree). A mean response greater than 0 indicates aggregate agreement with the statements in question (Table 12).

The Index of Community Attachment (i.e. the mean of the following four community attachment statements) indicates that statewide respondents are attached to their community. The average rating of 0.76 indicates that Montana residents like living in the state. They were very positive in their feelings about their community, except in regard to opinions about the future. At 0.26, this item received the lowest score of the four statements, indicating that residents are somewhat doubtful when it comes to the future of their community.

Table 12: Community Attachment Statements

	Statewide Mean*
I'd rather live in my community than anywhere else.	0.78
If I had to move away from my community, I would be very sorry to leave.	0.76
I think the future of my community looks bright.	0.26
It is important that the residents of my community be involved in decisions about tourism.	1.24
Index of Community Attachment**	0.76

* Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

** Index score is the average of the mean scores for the four community attachment statements.

Population Change: To assess residents' perceptions and opinions regarding population change in their community, respondents were asked to indicate how they perceived the population of their community to be changing and if so, how that change is occurring and at what rate (Tables 13 and 14).

On the statewide level, 13 percent of respondents feel that the population of their community is not changing. Sixty-four percent feel the population is increasing, while 23 percent feel it is decreasing. Of those who indicated that the population of their community is increasing, about half (48%) feel this is happening at the right rate. However, a full 50 percent feel this increase is occurring too fast. Of those who indicated that the population of their community is decreasing, the majority (62%) feels it is decreasing too fast. Thirty-one percent are happy with the perceived rate of decrease, while 7 percent feel the rate of decrease is too slow.

This questionnaire asked respondents to consider the population of their home community rather than the state. Because the survey is confidential, it is not possible to correlate each respondent with his/her community and evaluate the validity of responses for all communities in the state. City and county population data can be found at <http://ceic.commerce.state.mt.us/SF1demogProfiles.html>.

Table 13: Perceptions of Population Change

	Statewide*
Population is not changing	13%
Population is increasing	64%
Population is decreasing	23%

Table 14: Rate of Population Change

	Statewide
If you feel the population in your community is <u>increasing</u> , how would you describe the change?	
Population is increasing too fast	50%
Population is increasing at the right rate	48%
Population is increasing too slowly	2%
If you feel the population in your community is <u>decreasing</u> , how would you describe the change?	
Population is decreasing too fast	62%
Population is decreasing at the right rate	31%
Population is decreasing too slowly	7%

Current Conditions of and Tourism's Influence on Quality of Life

The concept of quality of life can be broken down into several independent aspects, including the availability and quality of public services and infrastructure, stress factors such as crime and unemployment, and overall livability issues such as cleanliness. When evaluating the potential for community tourism development, it is necessary to get an understanding of residents' opinions of the current quality of life in their community. This approach helps identify existing problem areas within the community, in turn providing guidance to developers. It is also necessary to understand how residents perceive increased tourism will change this current condition. Such perceptions define residents' attitudes toward this type of community development.

To this end, respondents were asked to rate the current condition of a number of factors that comprise their current level of quality of life using a scale ranging from -2 (very poor condition) to +2 (very good condition). They were also asked to rate how they believed increased tourism would influence these factors. The influence of tourism was rated using a scale of -1 (negative influence), 0 (both positive and negative influence), and +1 (positive influence) (Tables 15 and 16).

Generally speaking, statewide respondents are satisfied with current quality of life variables in their community. The only item to receive a rating of poor condition was job opportunities, although the cost of living is of some concern as well. The majority of respondents (66%) indicated that they expect increased tourism development to have a positive influence on the availability of jobs, but are not as confident when it comes to the influence on cost of living.

Montana's overall community livability, emergency services, parks and recreation areas, safety from crime, museums and cultural centers, overall cleanliness and appearance, the education system, local infrastructure, traffic congestion, and the condition of roads and highways were all deemed to be in good to very good condition. Tourism development is expected to further improve the condition of museums and cultural centers, as well as parks and recreation areas, and to have both a positive and negative influence on the remaining quality of life variables. Traffic congestion is the only variable which is expected to be mostly negatively influenced by increased tourism development.

Table 15: Quality of Life—Current Condition (Scale from –2 to +2)

	Statewide Mean*
Overall community livability	1.27
Emergency services	1.19
Parks and recreation areas	1.05
Safety from crime	1.02
Museums and cultural centers	0.84
Overall cleanliness and appearance	0.82
Education system	0.73
Infrastructure	0.56
Traffic congestion	0.44
Conditions of roads and highways	0.31
Cost of living	0.00
Job opportunities	-0.65

* Scores represent mean responses measured on a scale from -2 (very poor condition) to +2 (very good condition). The higher the score, the better the perceived condition of the item.

Table 16: Quality of Life—Tourism’s Perceived Influence (Scale from –1 to +1)

	Statewide			
	Negative Influence*	Positive & Negative Influence*	Positive Influence*	Mean Score**
Overall community livability	10%	63%	27%	0.17
Emergency services	16%	56%	28%	0.12
Parks and recreation areas	13%	40%	47%	0.33
Safety from crime	36%	49%	15%	-0.20
Museums and cultural centers	1%	16%	83%	0.82
Overall cleanliness and appearance	24%	48%	28%	0.03
Education system	9%	50%	41%	0.31
Infrastructure	30%	43%	27%	-0.02
Traffic congestion	68%	24%	8%	-0.60
Conditions of roads and highways	38%	34%	28%	-0.09
Cost of living	28%	49%	23%	-0.06
Job opportunities	6%	28%	66%	0.60

* Percentages may not add to 100 due to rounding.

** Scores represent responses measured on a scale from –1 (negative influence) to +1 (positive influence). The higher the score, the more positive the perceived influence of increased tourism on the condition of the variable.

Index of Tourism Support

In addition to tourism's perceived influence on well-being, another method of measuring the degree of support for tourism development is to ask respondents questions specific to the tourism industry and about interactions with tourists. Respondents were asked to indicate their level of agreement or disagreement with a number of tourism-related statements. Responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement, while a negative score indicates disagreement (Table 17).

On the whole, statewide respondents are relatively supportive of tourism and the travel industry in the state. Eighty-one percent support continued tourism promotion and advertisement to out-of-state visitors, while nearly two-thirds (65%) agree that their community is a good place to invest in tourism development. Sixty-five percent think that increased tourism in the state will help their community grow in the right direction, and 71 percent feel that the overall benefits of tourism outweigh any negative impacts. Tourism promotion by the state of Montana is thought by 78 percent to benefit local communities economically, while 49 percent believe tourism jobs offer opportunity for advancement. Fifty-three percent of statewide respondents think that increased tourism in the state will improve residents' quality of life.

Statewide respondents feel that tourism development in their community will not influence them personally in an economic way. Sixty-two percent do not see a connection between increased tourism and an increased or more secure income for themselves, and 70 percent do not think they will benefit financially if tourism were to increase in their community. However, the statewide responses produced an average score of 0.18 in the Index of Tourism Support, indicating that on average, Montana residents are somewhat supportive of tourism development because they feel that it can benefit their community even though it has no direct benefit for them.

The perceived lack of connection between tourism development and personal benefit may be one of the main obstacles currently facing this type of development in the state, and also a reason for the close-to-neutral score on the Index of Tourism Support.

Table 17: Tourism Support Statements

	Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	7%	12%	63%	18%	0.72
My community is a good place to invest in tourism development.	9%	26%	51%	14%	0.37
Increased tourism would help my community grow in the right direction.	8%	27%	53%	12%	0.35
The overall benefits of tourism outweigh the negative impacts.	4%	25%	62%	9%	0.47
Tourism promotion by the state of Montana benefits my community economically.	5%	17%	61%	17%	0.67
I believe jobs in the tourism industry offer opportunity for advancement.	10%	41%	43%	6%	0.00
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	10%	37%	49%	4%	0.00
If tourism increases in my community, my income will increase or be more secure.	24%	38%	30%	8%	-0.39
I will benefit financially if tourism increases in my community.	25%	45%	25%	5%	-0.60
Index of Tourism Support**	0.18				

* Scores represent mean response measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

** The Index of Tourism Support is the mean of the average score for each statement.

Index of Tourism Concern

The main issues of concern regarding tourism development deal with wage levels and crowding. Responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement while a negative score indicates disagreement (Table 18).

Eighty percent of statewide respondents believe that most tourism jobs pay low wages. Over half (55%) feel that tourists do not pay their fair share for the services they use, while another 51 percent agree that vacationing in Montana influences too many people to move to the state. Forty-three percent of respondents feel that the state is becoming too crowded because of tourists, and 36 percent feel that out-of-state visitors limit their access to recreation opportunities.

In this index, a higher score means a higher level of concern and statewide respondents scored marginally on the positive side of zero, due in large part to the level of concern exhibited on the wage issue. There is also some concern regarding crowding in the state, an issue which is very regional in nature, pitting the frequently-visited western part of the state against the less-traveled eastern part. These are clearly areas of concern and as such should be addressed by developers to facilitate this type of economic activity.

Table 18: Tourism Concern Statements

	Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I believe most of the jobs in the tourism industry pay low wages.	2%	18%	58%	22%	0.79
Tourists do not pay their fair share for the services they use.	4%	41%	38%	17%	0.24
Vacationing in Montana influences too many people to move to the state.	8%	41%	32%	19%	0.12
In recent years, Montana is becoming overcrowded because of more tourists.	11%	46%	30%	13%	-0.12
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	11%	53%	23%	13%	-0.27
Index of Tourism Concern**	0.15				

* Scores represent mean response measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

** The Index of Tourism Concern is the mean of the average scores for each statement.

Land Use Issues

Montana has a rich land heritage that appeals to residents and visitors alike. A large part of Montana's charm is related to its wide-open spaces, and residents are naturally sensitive with respect to how this resource is treated. Respondents were asked to express their agreement or disagreement with several statements related to land use issues, with responses ranging from -2 (strongly disagree) to +2 (strongly agree). A positive score indicates agreement, while a negative score indicates disagreement (Table 19).

Among statewide respondents, 59 percent agree that there is adequate undeveloped open space in their community, while 60 percent is concerned about its disappearance. Over three-fourths (78%) of statewide respondents are supportive of some form of land-use regulations to control the types of future growth in their community.

Table 19: Land Use Issues

	Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
There is adequate undeveloped open space in my community.	8%	33%	47%	12%	0.21
I am concerned with the potential disappearance of open space in my community.	7%	33%	37%	23%	0.37
I would support land use regulations to help manage types of future growth in my community.	7%	15%	57%	21%	0.68

* Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

Tourism-Related Decision-Making

Residents have strong feelings about participating in decisions that will ultimately affect their community and their own lives. They were asked to respond to two statements related to who should be making decisions about tourism in their community. Again, responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement while a negative score indicates disagreement (Table 20).

Most respondents feel strongly that residents should be involved in the decision-making process when it comes to tourism development. Ninety-two percent either agreed or strongly agreed that it is important for residents to be involved in decisions about tourism, while 67 percent disagreed that decisions regarding tourism volume are best left to the private sector, emphasizing the need for the public to be involved.

Table 20: Tourism-Related Decision-Making

	Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*
It is important that residents of my community be involved in decisions about tourism.	2%	6%	51%	41%	1.24
Decisions about how much tourism there should be in my community are best left to the private sector.	26%	41%	25%	8%	-0.50

* Scores represent responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

Advantages and Disadvantages of Tourism Development

To further clarify the perceived benefits and costs of tourism development, respondents were asked what they thought would be the top advantage and disadvantage of increased tourism in their community. These were open-ended questions where respondents provided their thoughts in their own words. The responses were then assigned to general categories to facilitate comparison (Tables 21 and 22).

The top advantage of tourism identified by survey respondents was an overall improved economy. Eighty-three percent of respondents indicated more jobs, higher income, and higher revenue for local businesses as the top advantages of increased tourism in their community. Five percent stated that they feel there are no advantages associated with tourism development.

In terms of disadvantages, increased population/crowding and traffic were of concern to a significant portion of statewide respondents (19% and 18%, respectively), as was stress to the existing infrastructure (17%). Ten percent stated that they see no disadvantages from tourism development.

Table 21: Advantages Associated with Increased Tourism

	Number of Responses*	Percent of Responses**
Improved economy	236	83%
Creating awareness for state	12	5%
No advantage	12	5%
Awareness for recreation	5	2%
Cultural awareness and diversity	4	2%
More people moving to the state	2	1%
More attractions	2	1%
Better roads	2	1%
Less reliance on extractive industries	1	<1%
Lower prices	1	<1%
Increased property values	1	<1%
Increased quality of life	1	<1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted dataset.

Table 22: Disadvantages Associated with Increased Tourism

	Number of Responses*	Percent of Responses**
More people moving to the state/crowding	44	19%
Traffic	42	18%
Stress on infrastructure	38	17%
No disadvantages	24	10%
Pollution/Litter/Weeds	20	9%
Higher prices	13	6%
Visitors don't pay for impacts	10	4%
Lack of respect	10	4%
More crime	8	4%
Reliance on tourism	8	4%
Decreased quality of life	3	2%
More development	2	1%
Increased taxes	2	1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted dataset.

Issues Related to the Lodging Facility Use Tax

During the summer of 1998, the Bed Tax Futures Committee appointed by the Tourism Advisory Council held four meetings around the state to examine the Bed Tax and its allocation structure. As an extension of those discussions, the Resident Attitude Survey started to address residents' knowledge of the tax and their opinions on its use.

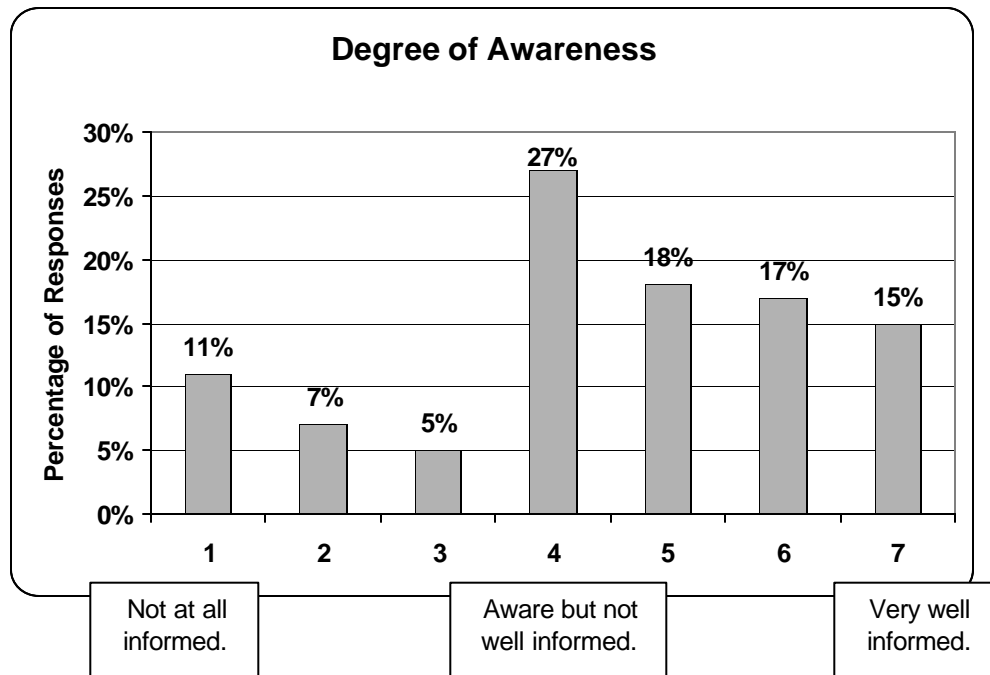
Respondents were asked about their familiarity with the Lodging Facility Use Tax (Bed Tax) prior to reading a description of it in the survey. Responses were registered on a scale from 1 ("Not at all informed") to 7 ("Very well informed"). The mid-point of 4 represented "Aware but not well informed."

Only 11 percent indicated that they feel they are not at all informed about the bed tax issue, while 15 percent feel they are very well informed. Twenty-seven percent indicated that they are aware of the tax but not well informed. A total of 23 percent feel they are less than aware of the bed tax issue, while 50 percent feel they are more than just aware of it (Figure 1).

The survey provided this brief description of the Bed Tax:

Montana currently collects a 4 percent tax on overnight accommodations (i.e. hotels, motels, resorts, private campgrounds). This tax is popularly called the "Bed Tax" and generates revenue to support tourism promotion, tourism research, state parks, historical signage, and so on.

Figure 1: Awareness of the Lodging Facility Use Tax

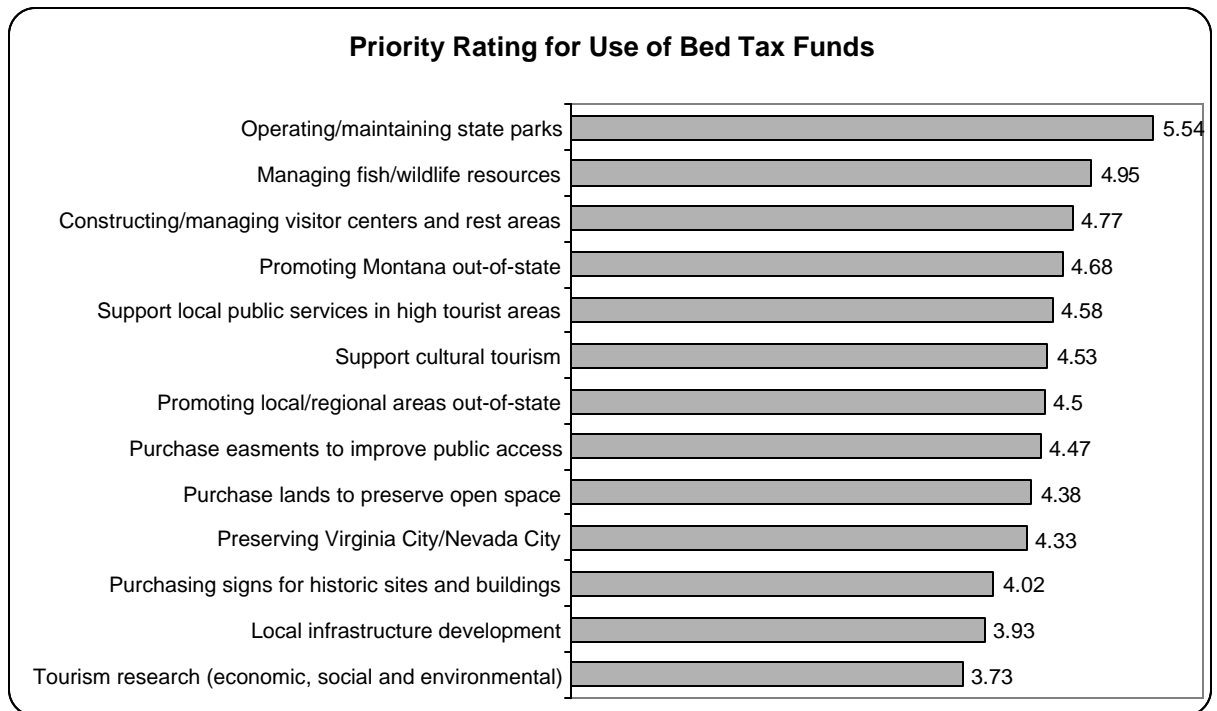


Respondents were also asked to rate 13 items on a scale from 1 (low priority) to 7 (high priority) in terms of priority for funding from the Bed Tax. The items were derived from the current allocation structure, as well as suggestions brought forth by various individuals and entities during the Bed Tax Futures Committee’s public hearings.

The ranking of these items is more representative of how Montanans value various aspects of the state’s features rather than the most appropriate way to spend funds generated through the Lodging Facility Use Tax, the distribution of which is determined by law.

Overall, respondents indicated that operating and maintaining state parks would be their top priority for spending of Bed Tax funds. Managing fish and wildlife resources and constructing/maintaining visitor centers and rest areas are also considered important uses of the funds, while signage for historical sites, local infrastructure development and tourism research came in at the bottom. It is important to note, however, that the top and the bottom score are separated by less than 2 points (Figure 2).

Figure 2: Priority Ratings for Bed Tax Funds*



*Represents mean score of all responses for each item; 7=high priority, 1=low priority.

Level of Awareness of the Travel Industry and its Impacts on the State

For the 2000/2001 CTAP, questions dealing with awareness of the travel industry in Montana were added to the questionnaire. There has been discussion regarding residents' lack of awareness when it comes to the industry and its role in the state's economy. Respondents were asked to assess how well they have been informed about the Montana travel industry in general, as well as about different aspects of its impact on Montana. The aspects that were considered included impact on the state's economic conditions, environmental conditions, and quality of life.

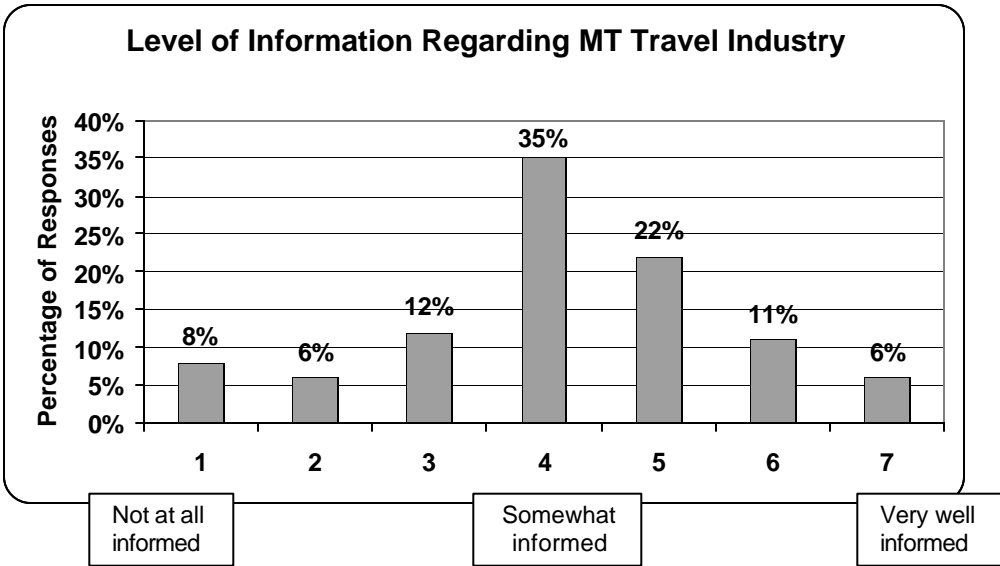
Level of Information About Montana's Travel Industry

Survey respondents were asked how well they felt they have been informed about the travel industry in Montana. They were asked to indicate their response on a 7-point scale from 1 ("Not at all informed") to 7 ("Very well informed"). The mid-point of 4 represents "Somewhat informed". The nature of the information was not specified, nor was the method of dissemination.

Eight percent of respondents indicated that they are not at all informed about the travel industry in the state, while 6 percent consider themselves very well informed. The largest portion of respondents (35%) indicated that they are "somewhat" informed. Overall, 26 percent feel they are less than "somewhat" informed about the travel industry, while 39 percent feel they are more than "somewhat" informed (Figure 3). The average score, while not reflected in the figure below, was 4.1, only fractionally above the mid-point of 4.

This distribution indicates that although there may be a lack of information on the Montana travel industry actually reaching Montanans, a large portion of Montana residents still has a fair amount of knowledge in this area.

Figure 3: Level of Information on Montana's Travel Industry

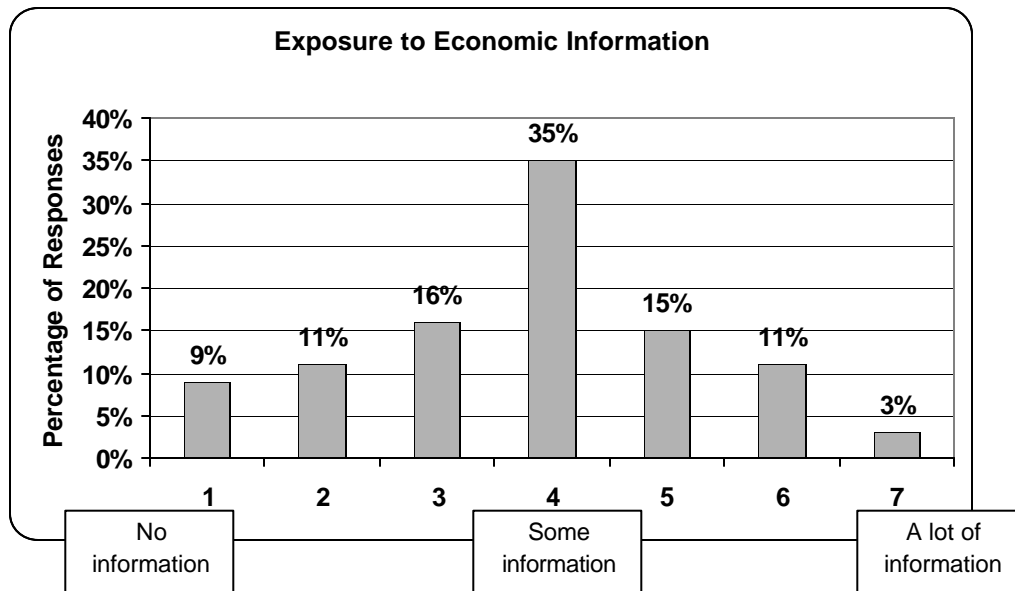


The Influence of the Travel Industry on Montana's Economic Conditions

While similar to the previous question, this item focuses on the economic impact of the travel industry on Montana and how informed residents are on this issue. Respondents were asked how much information they have been exposed to regarding the influence of the travel industry on the state's economic conditions. Exposure to information includes actively seeking informational material, as well as receiving unsolicited information through television, radio or print media. A 7-point scale was used here as well, ranging from 1 ("No information") to 7 ("A lot of information"). The mid-point of 4 represents "Some information".

The largest portion of respondents (35%) indicated that they have been exposed to "some" information about the travel industry's impact on economic conditions in Montana. Over one-third (36%), however, indicated that they have been exposed to less than "some" information. Nine percent indicated that they have been exposed to no information at all on this topic. Twenty-nine percent of respondents indicated that they have been exposed to more than "some" information on this issue, while only 3 percent feel they have been exposed to "a lot" of information (Figure 4). The mean score for this item was 3.8.

Figure 4: Exposure to Information on the Influence on Economic Conditions

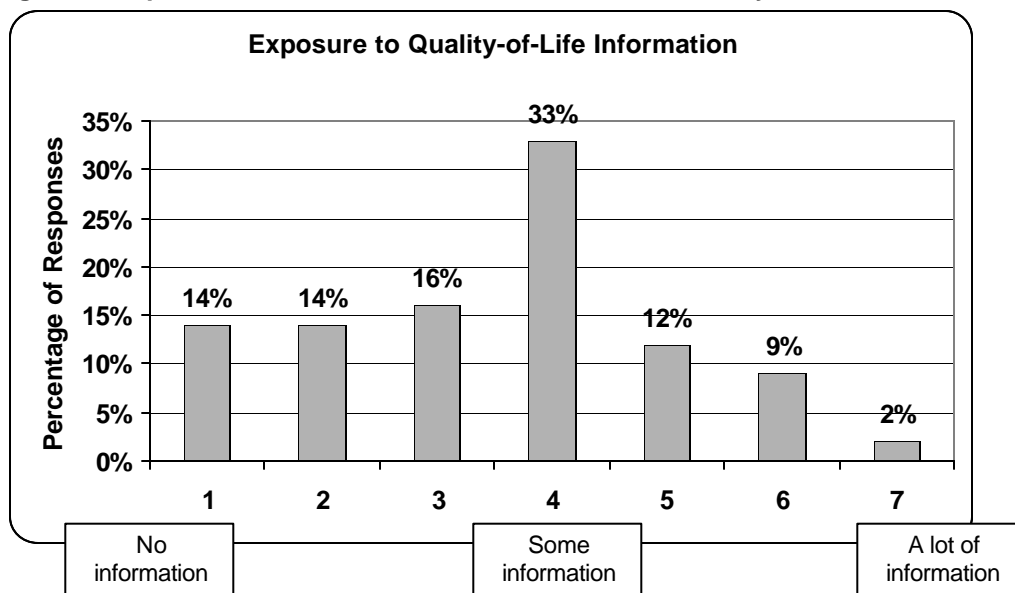


The Influence of the Travel Industry on Quality of Life in Montana

This question focused on respondents' knowledge of the influence the travel industry has on social conditions in Montana. Survey recipients were asked to indicate how much information they have been exposed to regarding the influence of the travel industry on quality of life in the state. The same 7-point scale was used for this question as for the previous one. Although no definition was given of "quality of life" in the question itself, other questions on the survey refer to its intended definition. Furthermore, the concept of quality of life is assumed to be of fairly standard definition and association.

While 33 percent indicated that they have been exposed to "some" information about impacts on quality of life, an astounding 44 percent feel they have been exposed to less than "some" information about the travel industry's influence on Montanans' quality of life. Fourteen percent indicated that they have not been exposed to any information on this topic at all. While 23 percent indicated that they have been exposed to more than "some" information on this issue, only 2 percent feel they have been exposed to "a lot" of information on tourism's effects on quality of life in the state. Mean score for this item was 3.5, the lowest of all the awareness questions (Figure 5).

Figure 5: Exposure to Information on the Influence on Quality of Life



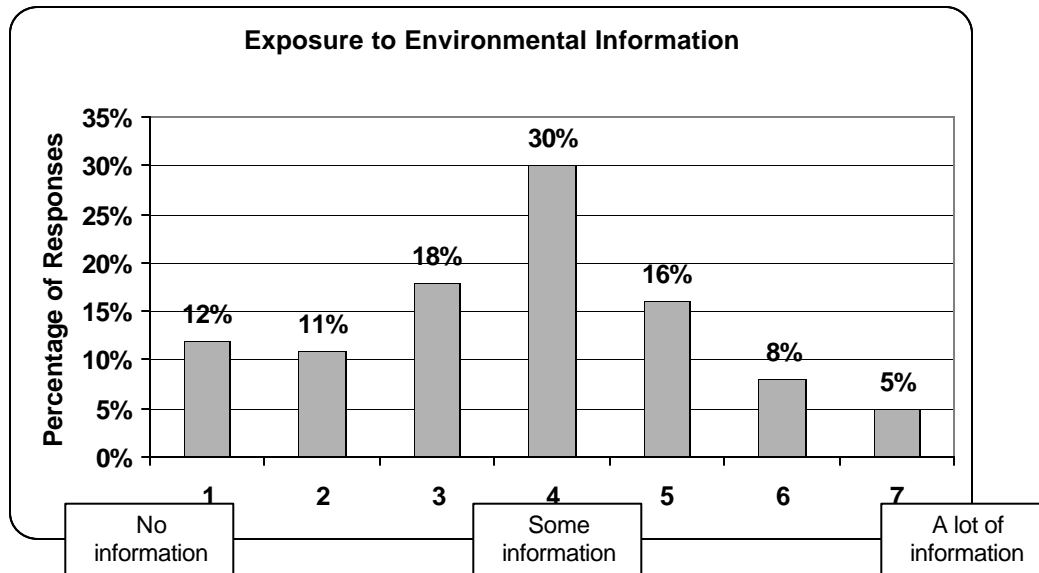
It is apparent when considering the above figures that there is truly a lack of information regarding the travel industry in Montana. While it may be the case that information does exist, if it does not reach its intended recipients, Montana's residents, its existence is a moot point.

The Influence of the Travel Industry on Montana's Environmental Conditions

This question focused on respondents' knowledge of the environmental impacts of the travel industry in Montana. Survey recipients were asked to indicate how much information they have been exposed to regarding the influence of the travel industry on Montana's environmental conditions. Again, exposure includes acquiring both solicited and unsolicited information. The same 7-point scale was used for this question as for the two previous ones.

Most of the respondents came in at the lower end of this distribution as well. Thirty percent indicated that they have been exposed to "some" information on tourism's environmental impacts, while a full 41 percent indicated that their exposure amounted to less than that, with 12 percent being exposed to no information at all on the environmental impact issue. Twenty-nine percent have been exposed to more than "some" information on this topic, while a mere 5 percent indicated that they have been exposed to "a lot" of information. The mean score for this item was 3.7 (Figure 6).

Figure 6: Exposure to Information on the Influence on Environmental Conditions

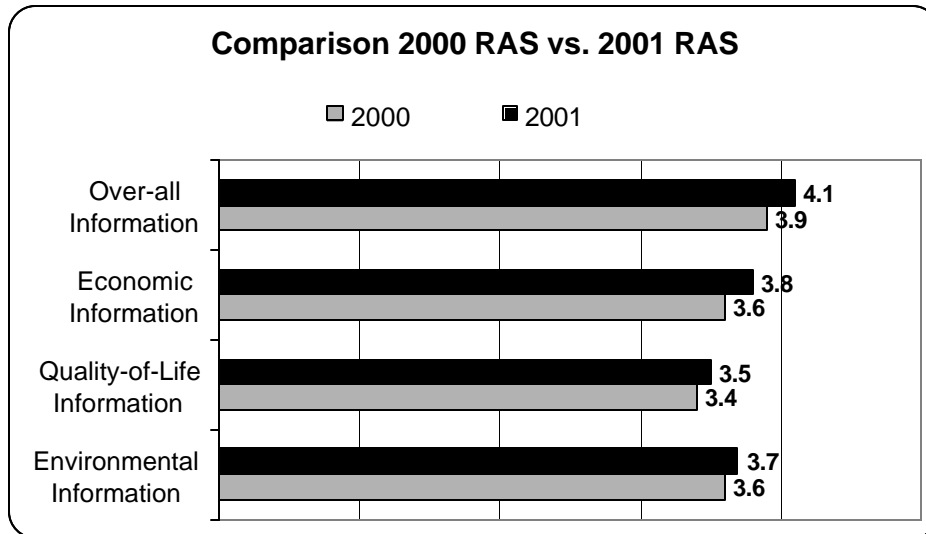


2000 RAS versus 2001 RAS

The mean scores for each of the preceding items were computed and compared to the mean scores resulting from the 2000 Resident Attitude Study, to get a sense of any changes from one year to the next.

Average scores did not improve by much from 2000 to 2001. In fact, the improvements were so small that even though the top and the bottom ranked items were separated by only 0.3 points in 2000 and by 0.4 points in 2001, the order of the items did not change from one year to the next. The minute improvements can be perceived as negligible, indicating that the level of public awareness is one that can only improve over time.

Figure 7: Comparison of 2000 RAS and 2001 RAS



Implications and Recommendations

Two consecutive Resident Attitude Studies have shown that Montana residents have little knowledge of the travel industry in the state. The perceived lack of connection between the industry and the general public can be an obstacle to tourism development. Because people do not realize that nonresident travel constitutes a \$1.7 billion industry, and because they have limited knowledge in terms of its composition, they do not see themselves as benefiting from this type of economic activity and as such may be reluctant to support it without additional information.

Successful economic development relies on the support and cooperation of those it affects. Since tourism is an industry that touches people in a unique way, this is even more true when it comes to the travel industry. Those that are touched by the Montana travel industry are Montana residents. To ensure their support and cooperation, it is necessary to inform them of what makes up the Montana travel industry. A previous section of this report stated the importance for residents to be involved in tourism decisions. An educated public is better equipped to participate in the planning process in a positive way, and to see and understand the connections between the industry and themselves. To accomplish this, tourism developers and the travel industry need to bring information to the public.

To provide a complete educational effort, Montana residents need to be made aware, not only how the travel industry functions on a general level, but also about the various impacts that the industry has on the state, namely economic, social and environmental.

In terms of the general make-up of the industry, it is important that residents are made aware of its diverse and complex nature. The travel industry comprises such different industry segments as airlines, guide services, hotels and retailers, to name a few, that are related not based on their product but on their consumer. Compounding the difficulty of measuring this industry is the fact that the industry segments involved derive only a portion of their business from travelers. As such, the travel industry contributes to a diversified economic base.

When it comes to the economic influences of the travel industry in Montana, residents need to learn how the \$1.74 billion spent by tourists in the state last year affected multiple sectors of the economy. It is important to draw attention to the numerous sectors where jobs are, in part, supported by tourism, as well as the significant economic contribution of seasonal and part-time jobs in the Montana economy. Jobs in the travel industry have a reputation for paying low wages and offering little opportunity for advancement. Details on these topics can be found in the paper [Employment and Wages: The Travel Industry in Montana](#)³ as well as in the book [Post-Cowboy Economics](#)⁴.

It is also important to explain the issues of the direct economic impact versus the indirect and induced impacts of tourism, and how the latter two benefit more people than just hotel clerks, resort owners and raft guides. For more information on this topic, see pages 2-5 of [An Economic Review of the Travel Industry in Montana: 2002 Edition](#)⁵.

When considering the social influences of tourism in the state, it is obvious that these impacts are largely tied to the economic impact and the enlarged tax base created by nonresident travel in the state. A prosperous community can better afford to improve or maintain the "quality-of-life" variables discussed on page 7, such as roads and highways, museums and cultural centers, parks and recreation areas, and the local education system. Being able to afford improvements in these areas will certainly affect the general level of community well-being. On the flip side of this equation, however, is the notion that quality of life is related to the level of crowding in a community. With visitation to the state increasing, so will the incidents of traffic congestion and crowding, adversely affecting quality of life.

³ Dillon, Thale. 2000. *Employment and Wages: The Travel Industry in Montana*. Technical Report 2000-1, University Travel Research Program, School of Forestry, The University of Montana, Missoula, MT. 9pp.

⁴ Power, Thomas and D. Barrett. [Post-Cowboy Economics](#). 2001. Island Press, New York, NY.

⁵ Dillon, Thale and J. Sanderson. 2002. *An Economic Review of the Travel Industry in Montana: 2002 Edition*. Institute for Tourism and Recreation Research, School of Forestry, the University of Montana, Missoula, MT. 42pp.

When it comes to tourism's influence on environmental conditions, there is an obvious lack of information. Much of what is being said about these impacts is based on speculation. However, it is safe to assume that the environmental impacts of tourism on the state are two-fold: some are positive, like those caused by the money visitors leave behind, while others are negative, like those caused by the congregation of too many people in one place. Regardless of approach, when addressing this issue it is important to acknowledge both sides and to address each concern specifically.

Addressing all these issues together will significantly increase people's understanding for the complex entity that is the travel industry in Montana. The fact that the travel industry is lacking in recognition as a bona fide industry, and a sizeable one at that, is one of its greatest problems. Lack of recognition is making it vulnerable to a certain measure of negative sentiment from local residents, as well as to negative policy decisions. While increasing recognition will not be a trigger for growth, it will improve the likelihood that the industry is treated on par with others rather than as a proxy, protecting the investment made in promotional and infrastructural developments.

General Comments

Survey recipients were given space at the end of the survey form to include their own thoughts and comments. This was an open-ended format with no guidelines as to the topic of the comments, thus they deal with a wide variety of issues. There is little consensus in terms of issues raised as most are mentioned by only one or two respondents. Therefore, these comments should not be considered as indicators of the general opinion of the sample, let alone Montana's residents (Table 23). Comments are cited verbatim in Appendix B.

Table 23: General Comments

Comment	Count*
Tourism helps Montana grow	5
Montana needs a sales tax	3
Tourism not worth the extra problems that come with it	3
Tourism will make Montana too big	2
Montana needs more industry	2
Advertising is a misuse of funds—should go to rest areas and infrastructure	2
Tourism is good until it changes the Montana way of life	1
Increasing tourism will result in a less stable economy	1
We need to vacation in-state to keep money in Montana	1
Must protect environment to sustain tourism	1
Cleaner road sides would improve visitor experiences	1
Need more jobs in recreation and forest “care,” not management	1
The Bed Tax is nothing more than a sales tax	1
Other states are misinformed about Montana	1
We are killing the thing that we love	1
Tourism enterprise is forced to enrich a few and exploit many	1
Niagara Falls is in decline because tourism was never main focus	1
Montana must strive towards diversified economy	1
Survey responses will differ from east and west	1
Bozeman has poor zoning districts	1
Bozeman's anti -growth attitude is out of sync with the rest of the country	1
Poor trust in government	1
We need to maintain our facilities better	1
Business owners treat locals poorly during tourist season	1
Shop in larger cities and catalogs for reasonable prices	1

* Number of respondents who raised the issue.

Please include any additional comments below:

Resident Attitudes Toward Tourism in Montana



Fall 2001



Thank you for your participation!
Please place your completed survey in the postage-paid envelope and drop it in any mailbox.

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

PART 1. Please indicate your involvement in the travel industry and the role you think it should have in your local economy.

1. How much contact do you have with tourists visiting your community? Please use a check mark (?) to indicate your answer.

- Frequent contact
- Somewhat frequent contact
- Somewhat infrequent contact
- Infrequent contact

2. Which of the following statements best describes your behavior toward tourists in your community?

Please ? your answer.

- I enjoy meeting and interacting with tourists.
- I am indifferent about meeting and interacting with tourists.
- I do not enjoy meeting and interacting with tourists.

3. Which of the following statements best describes your job? Please ? your answer.

- My place of work provides the majority of its products or services to tourists or tourist businesses.
- My place of work provides part of its products or services to tourists or tourist businesses.
- My place of work provides none of its products or services to tourists or tourists businesses.

4. Compared to other industries, how important a role do you think tourism should have in your community?

Please ? your answer.

- No role
- A minor role
- A role equal to other industries
- A dominant role

5. What types of economic development would you like to see in your community? Please rank options 1 through 8, with 1 being the *most* desired.

- | | |
|---|--|
| <input type="checkbox"/> Mining | <input type="checkbox"/> Agriculture/Agribusiness |
| <input type="checkbox"/> Wood Products | <input type="checkbox"/> Retail/Wholesale Trade |
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Services (health, businesses, etc.) |
| <input type="checkbox"/> Tourism/Recreation | <input type="checkbox"/> Technology |

6. In your opinion, how is the population changing in your community? Please ? your answer.

- Population is not changing (please skip to PART 2)
- Population is *increasing*
- Population is *decreasing*

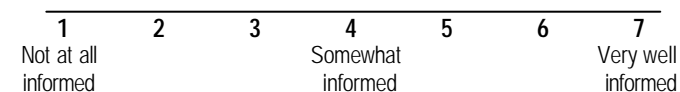


6A. If you feel the population of your community is changing, how would you describe the change? Please ? your answer.

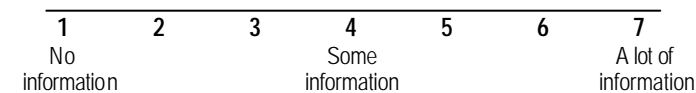
- Too fast
- About right
- Too slow

PART 2. The following questions deal with the amount of information available about the travel industry in Montana.

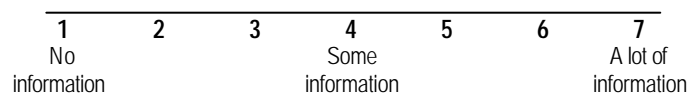
1. How well do you feel you have been informed about the travel industry in Montana? Please circle one number.



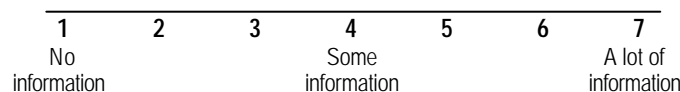
2. How much information have you been exposed to regarding the influence of the travel industry on Montana's economic conditions? Please circle one number.



3. How much information have you been exposed to regarding the influence of the travel industry on quality of life in Montana? Please circle one number.



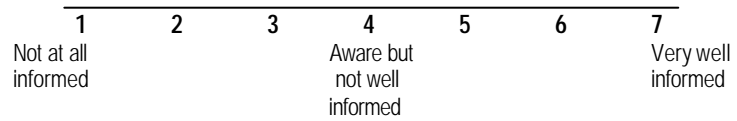
4. How much information have you been exposed to regarding the influence of the travel industry on Montana's environmental conditions? Please circle one number.



PART 3. In an effort to estimate how Montanans feel about the "Bed Tax", as well as the quality of life in their communities, we ask that you please share your thoughts on these issues.

Montana currently collects a 4% tax on overnight accommodations (i.e. hotels, motels, resorts, private campgrounds). This tax is popularly called the "Bed Tax" and generates revenue to support tourism promotion, tourism research, state parks, historical signage, and so on.

1. Before receiving this survey, how informed were you of the "Bed Tax" issue? Please circle one number.



2. How do you feel the Bed Tax funds should be spent? Please rate each of the following items in terms of priority for funding, with 7 indicating *high* priority and 1 indicating *low* priority. Circle one number for each item.

	Low Priority			High Priority			
	1	2	3	4	5	6	7
Promoting Montana to out-of-state visitors.	1	2	3	4	5	6	7
Promoting regional and local areas to out-of-state visitors.	1	2	3	4	5	6	7
Operating and maintaining state parks.	1	2	3	4	5	6	7
Preserving Virginia City/Nevada City.	1	2	3	4	5	6	7
Studying economic, environmental and social impacts of tourism and recreation.	1	2	3	4	5	6	7
Purchasing signs for historic sites and buildings.	1	2	3	4	5	6	7
Purchasing easements to improve access to public lands and open space.	1	2	3	4	5	6	7
Purchasing lands to preserve undeveloped open space.	1	2	3	4	5	6	7
Assisting tourism infrastructure development in local communities.	1	2	3	4	5	6	7
Supporting local public services in high tourist areas (police, fire, etc.).	1	2	3	4	5	6	7
Supporting cultural tourism (Native American, Lewis & Clark, etc.).	1	2	3	4	5	6	7
Managing fish and wildlife resources.	1	2	3	4	5	6	7
Constructing and/or maintaining visitor information centers and rest areas.	1	2	3	4	5	6	7

3. Please rate the current condition of each of the following elements of quality of life in your community. Please circle one answer for each item.

	Very Poor Condition	Poor Condition	Good Condition	Very Good Condition	Don't Know
Emergency services (police, fire, etc.)	1	2	3	4	DK
Museums and cultural centers	1	2	3	4	DK
Job opportunities	1	2	3	4	DK
Education system	1	2	3	4	DK
Cost of living	1	2	3	4	DK
Safety from crime	1	2	3	4	DK
Condition of roads and highways	1	2	3	4	DK
Infrastructure (water, sewer, etc.)	1	2	3	4	DK
Traffic congestion	1	2	3	4	DK
Overall community livability	1	2	3	4	DK
Parks and recreation areas	1	2	3	4	DK
Overall cleanliness and appearance	1	2	3	4	DK

4. Please indicate how you think the following elements of quality of life would be influenced if tourism were to increase in your community. Please circle one answer for each item.

	Negative Influence	Both Positive and Negative	Positive Influence	No Influence	Don't Know
Emergency services (police, fire, etc.)	-	+/-	+	NI	DK
Museums and cultural centers	-	+/-	+	NI	DK
Job opportunities	-	+/-	+	NI	DK
Education system	-	+/-	+	NI	DK
Cost of living	-	+/-	+	NI	DK
Safety from crime	-	+/-	+	NI	DK
Condition of roads and highways	-	+/-	+	NI	DK
Infrastructure (water, sewer, etc.)	-	+/-	+	NI	DK
Traffic congestion	-	+/-	+	NI	DK
Overall community livability	-	+/-	+	NI	DK
Parks and recreation areas	-	+/-	+	NI	DK
Overall cleanliness and appearance	-	+/-	+	NI	DK

5. Please indicate your level of agreement or disagreement with each of the following statements regarding tourism in your community and in the state of Montana. Please circle your answers.

	Strongly Disagree	Disagree	Agree	Strongly Agree
I'd rather live in my community than anywhere else.	1	2	3	4
If I had to move away from my community, I would be very sorry to leave.	1	2	3	4
I think the future of my community looks bright.	1	2	3	4
My community is a good place to invest in new tourism development.	1	2	3	4
Increased tourism would help my community grow in the right direction.	1	2	3	4
It is important that the residents of my community be involved in decisions about tourism.	1	2	3	4
Decisions about how much tourism there should be in my community are best left to the private sector.	1	2	3	4
There is adequate undeveloped open space in my community.	1	2	3	4
I am concerned about the potential disappearance of open space in my community.	1	2	3	4
I would support land use regulations to help manage types of future growth in my community.	1	2	3	4
Tourism promotion by the state of Montana benefits my community economically.	1	2	3	4
If tourism increases in my community, my income will increase or be more secure.	1	2	3	4
I will benefit financially if tourism increases in my community.	1	2	3	4
I support continued tourism promotion and advertising to out-of-state visitors by the State of Montana.	1	2	3	4
I believe jobs in the tourism industry offer opportunity for advancement.	1	2	3	4
Vacationing in Montana influences too many people to move to the state.	1	2	3	4
In recent years, Montana is becoming overcrowded because of more tourists.	1	2	3	4
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	1	2	3	4
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	1	2	3	4
Tourism increases opportunities to meet people of different backgrounds and cultures.	1	2	3	4
Tourists do not pay their fair share for the services they use.	1	2	3	4
I believe most of the jobs in the tourism industry pay low wages.	1	2	3	4
The overall benefits of tourism outweigh the negative impacts.	1	2	3	4

6. In your opinion, what is the primary advantage of increased tourism in your community?

7. In your opinion, what is the primary disadvantage of increased tourism in your community?

PART 4. Please tell us something about yourself. Keep in mind that this survey is completely confidential.

1. How many years have you lived in your community? _____ years in community

2. How many years have you lived in Montana? _____ years in Montana

3. What is your age? _____ your age in years

4. Where in your community do you live? Please ? your answer.

() In town ("urban" setting) () Out of town ("rural" setting)

5. Were you born in Montana? Please ? your answer.

() Yes () No

6. What is your gender? Please ? your answer.

() Male () Female

7. What is your employment status? Please ? your answer.

() Employed () Retired () Unemployed/Disabled

8. Please use the list below to let us know the type of work held by members of your household. Use a check mark (?) to indicate your answers.

- | | | |
|----------------------------|--------------------|--|
| () Manufacturing | () Agriculture | () Construction |
| () Wholesale/retail trade | () Health care | () Forestry/forest products |
| () Travel industry | () Professional | () Transportation, Communication or Utilities |
| () Education | () Clerical | () Finance, Insurance or Real Estate |
| () Services | () Restaurant/Bar | () Armed services |
| () Other: _____ | (please specify) | |

The following are comments taken from the back page of the statewide Resident Attitude Survey. The comments are given verbatim; only grammatical corrections have been made where necessary to facilitate understanding.

- Cleaning road sides could improve visitors' experiences.
- We need more and better maintained rest-stops.
- Increasing tourism will result in a much less stable (seasonal) economy. We must exert great energy towards a diversified economy.
- Business owners treat locals poorly during tourist season. Locals are condemned for going to Billings and using catalogs for purchases.
- Push for a sales tax.
- Montana is beautiful, but the public in most states east of here are ill informed.
- I feel we have seen positive results from the Goldwing rally, R.V. convention and bowling tournament.
- Spend too much on advertising and not enough on rest stops and other infrastructure investments.
- Abolish the bed tax for Montana residents, it's nothing more than a sales tax and if we have a sales tax, have it for everyone.
- We live close to Fort Peck Lake so tourists and recreation are a big boost to our community.
- We need a sales tax in this state.
- I am sure that the responses you receive from west MT will contrast from us over here in the east.
- Bed tax dollars would be good, but if increased tourism means increased casinos, I say block them out.
- Tourism helps Montana grow, but too much will hurt Montana. It will make us too big.
- Niagara Falls is in decline because tourism was never the main focus.
- The states money is better spent in grants to small towns to improve attractions. We need to vacation in our own state and keep the money in MT.
- I think the down side of tourism for the state is when the tourists move here and try to take over and change our way of life.
- Need a sales tax to offset the costs of tourist's use of our roads, water, sewer, emergency services, etc.
- Is tourism worth the added problems it brings? Tourism helps bring awareness to MT. Tourism will make MT too big.
- The very qualities that attract tourists to our state will become degraded by too many visitors.
- Lets get back to where the good paying jobs used to be, mining, logging and ranching.
- Zone control is a joke. Bozeman's "anti-growth" attitude is out of sync with the rest of the world.
- We are killing the thing that we love. Enterprise is formed to enrich few and exploit many.
- Tourists need to be taxed in some more ways; they come and use all of our areas and don't pay anything.
- Montana would greatly benefit if we had a sales tax.
- Montana needs tourism to grow.
- There is a fine line between maintaining environment and being good hosts. Tourism could be a financial asset if it offset road maintenance costs.
- I firmly believe we need more industry here...less emphasis on extractive resources. More jobs in Recreation and Forest care.
- ...impressed with the floats Montana used to enter in the Rose Bowl Parade. It seemed to really inspire individuals to want to see Montana.
- All it would do for a lot of us is to bring up the cost of living.
- I would not want local or state government to make decisions on tourism or use of public lands.
- We must protect our environment to sustain the tourist industry. People need to be made aware of our increased economic dependence on tourism.