

Exploring Tourism Development Potential:

Resident Attitudes in Phillips County, MT CTAP 2001-2002

By

Holly Praytor

Thale Dillon

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Institute for Tourism and Recreation Research

School of Forestry

The University of Montana

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Executive Summary

This report presents information about tourism in Phillips County, Montana. Phillips County is located in northeastern part of the state, with Malta as the largest community. This report includes the results of two surveys: 1) the Phillips County resident attitude survey, providing residents' opinions and attitudes regarding tourism and tourism development in the state and in the region, and 2) the results of a statewide resident attitude survey for comparative purposes. The report also offers estimated travel volume and traveler characteristics for the county based on the 1996 statewide nonresident visitor study.

A mail-back questionnaire was administered to a randomly selected sample of 500 Phillips County households during October and November 2001, and to a statewide sample of 1,000 Montana households during the same period. The survey sequence was initiated by mailing a pre-survey notice letter to all selected households. The survey mailing itself was followed by a reminder/thank-you postcard a week later. Two weeks after mailing the postcard, a replacement survey was sent to those households who had not yet responded.

NONRESIDENT VISITORS:

- In 2001, over 3.9 million travel groups visited Montana. Of those, approximately 197,000 (5%) passed through Phillips County.
- Over \$1.7 billion was spent statewide in 2001 by nonresident travelers. This figure amounts to approximately \$1,905 for every Montana resident.
- In Phillips County, nonresident visitors spent over \$2.4 million, or about \$536 per county resident.
- Visitors to Phillips County spent most of their money at gas stations and in restaurants/bars.
- Travelers to Phillips County stayed in the state about twice as long as statewide visitors.
- Phillips County visitors traveled mainly as couples.
- Overnight visitors to Phillips County were more likely than statewide visitors to stay in campgrounds (public or private), but about equally likely to stay at a hotel or motel.
- Travelers to Phillips County reported that the best sources of travel information while in Montana were persons in visitor information centers and persons in motels, restaurants and gas stations, etc.
- Forty-seven percent were in Montana primarily for vacation, and 36 percent were in the state mainly because they were passing through on their way somewhere else.
- Vacationers in Phillips County were attracted to Montana primarily because of Glacier National Park.

RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:

- Respondents from Phillips County have resided in their community and in the state for a longer time than the statewide sample.
- Eighty percent of the Phillips County sample are native Montanans.
- The majority of Phillips County respondents feel tourism should have a role equal to other industries in the local economy, and ranked the tourism and recreation industry 4th on a list of desired economic development options.
- Most Phillips County respondents work in places that supply little or none of their products or services to tourists or tourist businesses.
- Statewide respondents have a stronger attachment to their community than do Phillips County respondents. Both groups are somewhat concerned about the future of their communities.
- Ninety-one percent of Phillips County respondents feel that the population in the area is decreasing, and of them, 91 percent feel it is decreasing too fast.
- Phillips County respondents feel their quality of life can be enhanced by improving the condition of job opportunities, as well as road conditions and cost of living.

- The respondents of Phillips County are generally supportive of tourism development, more so than the statewide sample. Although few feel they will benefit personally from tourism, they agree that it will improve the quality of life for people in Montana.
- Respondents feel strongly that any decision about tourism development should involve local residents and not be left entirely to the private sector.
- Overall economic benefit is perceived as the primary advantage of increased tourism in Phillips County, while increased crime, people moving to the area and crowding/traffic are seen as the leading disadvantages.

CONCERNS OF PHILLIPS COUNTY RESIDENTS:

- Phillips County respondents value the open-minded and friendly small-town atmosphere and would like to see these characteristics continued into the future.
- Respondents dislike the business closings that take place in the county, along with people moving away from the area.
- Of the things that Phillips County respondents feel are missing, industry/business rank the highest, followed by jobs and people.
- Phillips County respondents indicated that 58 percent of them are hunters, while 64 percent are fishermen. Forty-nine percent of respondents would welcome more hunters into the community, while 63 percent would welcome more fishermen.
- To accommodate more visitors, improvements are needed to the highway system, as well as to county roads used to access recreation areas.
- The top attractions frequented by Phillips County residents include the Phillips County Fair, Nelson Reservoir and the Little Rockies. Those who have visited these attractions are also extremely likely to recommend them to their visiting friends and relatives.
- Suggestions of new attractions in Phillips County to turn the county into a destination include establishing a dinosaur dig/museum and car racing.

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Introduction

This report is intended to provide a profile of current visitors to Phillips County, as well as resident attitudes regarding tourism and the travel industry in the county. It combines the results of two different studies and is presented in two sections. The first section contains nonresident visitor profiles for Phillips County and the state of Montana. These were developed using research conducted by ITRR during the summer of 1996. At that time, nonresident summer travelers to Montana were surveyed during a four-month study¹. A profile of Phillips County visitors was developed from the subset of surveys submitted by nonresident travelers passing through the county. For comparative purposes, both statewide and Phillips County visitor profiles are provided.

The second section contains an assessment of resident attitudes toward tourism and the travel industry in Phillips County. This assessment is the result of mail-back questionnaires obtained from households in Phillips County as well as the state. Both Resident Attitude Surveys were conducted during October and November 2001 and the results are reported together to provide a comparison between resident opinions toward tourism in Phillips County and in Montana as a whole.

Funding for this research came from the Lodging Facility Use Tax. Copies of this report can be downloaded from ITRR's web site (www.forestry.umt.edu/itrr) at no charge.

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

Section 1: The Nonresident Travel Study

Methodology

Travelers to Montana during the summer season of 1996 (June 1-September 30) were intercepted for the Nonresident Travel Study. The traveler population was defined as those travelers entering Montana by private vehicle or commercial air carrier during the study period, and whose primary residence was not in Montana at the time. Specifically excluded from the study were those persons traveling in a plainly marked commercial or government vehicle such as a scheduled or chartered bus, or semi truck. Also excluded were those travelers who entered Montana by train. Other than these exclusions, the study attempted to assess all types of travel to the state.

Data was obtained through a mail-back diary questionnaire administered to a sample of intercepted travelers in the state. During the four-month study period, 12,941 groups were contacted. Usable questionnaires were returned by 5,800 groups, resulting in a response rate of 45 percent. A sample of 335 respondent groups traveled through Phillips County in the summer of 1996 (Table 1). Phillips County is located in northeastern Montana.

Table 1: Sample Sizes and Response Rates for the 1996 Summer Nonresident Travel Study

Nonresident groups contacted	12,941
Usable questionnaires returned	5,800
Nonresident Travel Study response rate	45%
Phillips County sample size	335
Percent of nonresident sample	6%

A Profile of Current Summer Visitors

ITRR nonresident travel estimates report that approximately 2,267,000 groups, averaging 2.6 people per group, visited Montana during the 2001 summer season². It was estimated that 6 percent, or approximately 136,000 of those groups passed through Phillips County, and that 10 percent of those who traveled through spent at least one night there.

Group Characteristics

Travel group characteristics for Phillips County were obtained from visitors who spent at least one night in the area. There were some differences between the travel groups staying overnight in Phillips County and the statewide sample. However, the sample size for overnight visitors to Phillips County is too small (34) to reliably generalize the data. Therefore, the data provided in this report should be used only as a guide (Table 2).

Phillips County: The average group size for Montana visitors who spent at least one night in Phillips County was 2.3 people. A full 77 percent of travelers had visited Montana before this trip. Most summer visitors to Phillips County traveled as couples (59%), while 28 percent traveled with family. The largest portion of males was between 55 and 64 years of age (31%), while the largest portion of females was over 65 (30%). The majority of summer visitors (74%) spent at least one night in either a public or private campground while 56 percent spent at least one night in a hotel/motel. Visitors stayed an average of 6.9 nights.

² The total number of travelers is estimated each year, while the profile of visitors is only re-evaluated every few years. Therefore, this report presents traveler characteristics that are estimated from data collected in the summer of 1996, applied to the estimated number of travelers and their total economic impacts for 2001.

Statewide: For travelers to the state, the average group size was 2.6, a fraction larger than for Phillips County visitors. The same portion of statewide visitors, 77 percent, were repeat visitors, and most traveled as couples (38%), with almost as many traveling as family (34%). The largest portion of the statewide male visitor population was between 35 and 54 years of age (36%), as was the case for females (38%). A typical visitor to Montana spent 3.5 nights in the state, and 59 percent spent at least one night in a hotel/motel. Statewide visitors do not camp nearly as much as do visitors to Phillips County.

Table 2: Characteristics of Nonresident Summer Visitors

	Phillips County*	Statewide
Group Type		
Couple	59%	38%
Family	28%	34%
Alone	6%	17%
Friends	6%	7%
Family & friends	--	3%
Business associates	--	1%
Group or club	--	--
Group Size	2.3	2.6
Have previously visited Montana	77%	77%
Nights spent in Montana	6.9	3.5
Accommodations used in Montana**		
Hotel or motel	56%	59%
Private campground	37%	18%
Public campground	37%	16%
Home of friend or relative	15%	21%
Undeveloped campground	-	4%
Resort or guest ranch	-	5%
Condominium	-	1%
Other	4%	5%
Age of Males		
Age 0 to 24	5%	19%
Age 25 to 34	11%	10%
Age 35 to 54	25%	36%
Age 55 to 64	31%	18%
Age 65 and older	28%	19%
Age of Females		
Age 0 to 24	13%	17%
Age 25 to 34	5%	11%
Age 35 to 54	24%	38%
Age 55 to 64	28%	19%
Age 65 and older	30%	15%

Source: ITRR

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

** Percentages do not add to 100 because respondents could indicate more than one accommodation type.

Visitors to the state as well as to Phillips County were from a variety of origins. However, as mentioned above, the Phillips County sample was too small for any reliable frequency of origin to be computed. The sample size of 34 is too low to allow each of the 50 states to be mentioned. In the statewide sample, the most common origin was Washington, closely followed by California and Idaho (Table 3).

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

Rank*	Phillips County	Statewide
1		Washington
2		California
3	N/A	Idaho
4		Wyoming
5		Colorado

Source: ITRR

* 1=highest frequency

Information Sources

Nonresident travel groups indicated which information sources were used as planning tools for their trip *prior* to arriving in Montana, as well as *while* they were in Montana. Also, respondents indicated which of the sources were most useful to them. A list of 11 information sources was included in the questionnaire (Tables 4 and 5).

Phillips County: Eighteen percent of visitors to Phillips County did not use any of the listed sources prior to their trip. The most frequently used sources of travel information were AAA (43%) and travel guide books (31%), followed by the Montana Travel Planner (18%). The *most useful* sources of travel information used prior to arriving in Montana were also AAA (50%), travel guide books (22%) and the Montana Travel Planner (15%).

Statewide: Thirty-nine percent of statewide visitors did not use any of the 11 listed information sources prior to travel. However, 31 percent used AAA, 22 percent used travel guide books and 21 percent used the National Park brochures. The *most useful* sources of information used prior to travel were AAA (38%), travel guide books (19%) and the Montana Travel Planner (12%).

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

Information Sources	Phillips County		Statewide	
	All Sources*	Most Useful Source	All Sources*	Most Useful Source
AAA	43%	50%	31%	38%
Travel guide book	31%	22%	22%	19%
Montana Travel Planner	18%	15%	13%	12%
Information from private businesses	16%	4%	7%	5%
National Park brochure	11%	--	21%	10%
1-800 State travel number	8%	7%	7%	4%
Chamber or visitor bureau	4%	2%	7%	5%
State Park brochure	2%	--	4%	1%
Internet travel information	--	--	5%	3%
Regional travel number	--	--	<1%	<1%
Attending travel trade show	--	--	<1%	<1%
<i>None of these sources</i>	18%	N/A	39%	N/A

Source: ITRR

* Visitors could indicate more than one information source.

Phillips County: Visitors were also asked where they received travel information while *in* Montana. For overnight visitors to Phillips County, the travel information sources used most frequently were persons in motel, restaurant, gas station, etc. (52%), brochure racks (40%), highway information signs and persons in visitor information centers (37% each). Visitors then indicated what source was the *most* useful while traveling *in* Montana. Thirty-seven percent of respondents stated that persons in visitor information center were most helpful, followed by persons in motels, restaurants, gas station, etc. (20%) and brochure racks (16%).

Statewide: Thirty-six percent of statewide visitors indicated that while *in* Montana, they obtained travel information from persons in motels, restaurants, gas stations, etc. Other prominent information sources were highway information signs (35%) and brochure racks (33%). Of the information sources used while *in* Montana, statewide visitors indicated that the *most* useful were persons in motels, restaurants, gas stations, etc. and persons in visitor information centers (23% each), followed by highway information signs (19%).

Table 5: Sources of Information Used When *in* Montana

Information Sources	Phillips County		Statewide	
	All Sources*	Most Useful Source	All Sources*	Most Useful Source
Person in motel, restaurant, gas station, etc.	52%	20%	36%	23%
Brochure rack	40%	16%	33%	15%
Highway information signs	37%	8%	35%	19%
Person in visitor information center	37%	37%	27%	23%
Other	17%	13%	18%	18%
Business billboards	12%	6%	10%	2%
Computer touch-screen info center	--	--	<1%	--
<i>None of these sources</i>	15%	N/A	23%	N/A

Source: ITRR

*Visitors could indicate more than one information source.

Purposes of Summer Trip

Nonresident travel groups were asked their reasons for traveling to Montana. Many visitors had more than one reason, and were thus asked to identify their *primary* reason for coming to the state as well (Table 6).

Phillips County: Eighty-four percent of Phillips County visitors indicated that vacation was one reason for traveling to Montana. Other frequently cited reasons included passing through the state (55%) and visiting family or friends (34%).

With respect to Phillips County overnight visitors' *primary* reason for visiting the state, nearly half (47%) were in Montana on vacation. Other common *primary* reasons included just passing through (36%) and visiting family or friends (17%). With over one-third of visitors driving through the county on their way to somewhere else, providing opportunities for drive breaks could be a way to capture a larger share of these travelers. Marketing to those who are in the area to visit family or friends could also be beneficial.

Statewide: Over three-fourths (77%) of statewide visitors cited vacation as one reason for their trip to Montana. Also frequently mentioned were visiting family or friends (31%) and passing through (31%). Statewide travelers most frequently cited vacation as their *primary* reason for visiting Montana (49%). Passing through the state (21%) and visiting family or friends (16%) were also indicated as *primary* reasons.

Table 6: Reasons for Traveling to Montana

Montana Reasons	Phillips County		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	84%	47%	77%	49%
Passing through	55%	36%	31%	21%
Visit family or friends	34%	17%	31%	16%
Business	--	--	10%	6%
Recreational shopping	8%	--	9%	1%
Necessity shopping	5%	--	4%	1%
Other	--	--	4%	3%
Medical	--	--	3%	2%
Convention or meeting	--	--	2%	1%

Source: ITRR

* Visitors could indicate more than one reason.

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

Montana Attractions

Respondents who indicated that one purpose for their trip was vacation were asked what attracted them to Montana as a vacation destination. They were asked to check *all* pertinent attractions, and then indicate one *primary* attraction (Table 7).

Phillips County: Many Phillips County vacationers were attracted by more than one of the state's many features. The top five Montana attractions were the mountains (72%), Glacier National Park (58%), rivers (42%), lakes (40%) and open space (39%). Glacier National Park (37%) was the most popular *primary* attraction for Phillips County overnight visitors, followed by mountains and open space (15% each).

Statewide: Statewide visitors were also attracted to Montana for several reasons. The top attractions to Montana included the mountains (51%), Yellowstone National Park (39%), the rivers (35%), Glacier National Park (31%) and open space (31%). The most frequently cited *primary* Montana attractions for statewide visitors were Glacier National Park (24%) and Yellowstone National Park (21%).

Table 7: Attractions of Montana as a Vacation Destination

Montana Attractions	Phillips County		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
Mountains	72%	15%	51%	12%
Glacier National Park	58%	37%	31%	24%
Rivers	42%	--	35%	1%
Lakes	40%	3%	26%	1%
Open Space	39%	15%	31%	6%
Uncrowded areas	30%	6%	27%	4%
Wildlife viewing	27%	--	28%	2%
Camping	25%	5%	19%	2%
Friendly people	23%	--	18%	3%
Montana history	21%	--	11%	1%
Yellowstone National Park	17%	4%	39%	21%
Historic sites	17%	2%	13%	2%
Native American Culture	16%	3%	10%	1%
Northern Great Plains	16%	--	6%	--
Badlands	14%	--	6%	1%
National forests	14%	--	15%	1%
Hiking	14%	--	15%	1%
Wilderness areas	13%	--	5%	1%
Fishing	12%	--	14%	6%
Special attractions	9%	7%	8%	6%
State parks	7%	--	6%	--
Special events	3%	3%	4%	4%

Source: ITRR

* Visitors could indicate more than one attraction.

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

Visitor Activities

Some differences can be seen among the activities participated in by statewide visitors and by overnight visitors to Phillips County (Table 8).

Phillips County: Watching wildlife was the most popular activity among those visitors spending a night in Phillips County (51%). Other popular activities included nature photography (41%), developed-area camping (29%), and visiting historic/interpretive sites (29%).

Statewide: For all visitors to the state as well, wildlife viewing topped the list of recreational activities (45%). Visiting family or friends (34%) was also popular, as was nature photography (33%) and recreational shopping (32%).

Table 8: Recreational Activity Participation

Activities	Phillips County*	Statewide*
Wildlife watching	51%	45%
Nature photography	41%	33%
Camping (developed area)	29%	28%
Historic/interpretive sites	29%	29%
Recreational shopping	24%	32%
Visiting family or friends	23%	34%
Picnicking	23%	26%
Camping (primitive areas)	15%	10%
Gambling	14%	10%
Day hiking	13%	29%
Fishing	13%	15%
Visiting museums	11%	21%
Swimming (in pools)	11%	14%
Nature studies	10%	9%
Amusement park/center	8%	3%
Visiting Native American sites	7%	10%
Golfing	4%	5%
Off-road/ATV	3%	2%
Swimming (natural areas)	2%	7%
River floating/rafting	2%	6%
Backpacking	2%	2%
Mountain Biking	2%	8%
Road Biking	2%	4%
Motor boating	2%	9%
Water skiing	2%	1%
Canoeing/Kayaking	2%	5%
Sailing/Windsurfing	2%	<1%
Special event/Festivals	--	8%

Source: ITRR

* Visitors could indicate more than one activity.

Economic Characteristics

Information about the number of visitors to an area and how much they spend during their stay is useful for planning purposes. While travel group characteristics are based only on groups who spent a night in Phillips County during the summer, economic information is more inclusive and represents all groups who spent money in the county throughout the entire year (Table 9).

ITRR staff has estimated that 3,938,000 travel groups visited Montana in 2001. Of the more than 3.9 million groups, approximately 197,000 (5%) passed through Phillips County.

Phillips County: Nonresident spending in Phillips County exceeded \$2.4 million in 2001, but totaling less than 1 percent of all nonresident spending in Montana. Nonresidents spent the equivalent of \$536 per county resident.

Statewide: Nonresident visitors spent over \$1.7 billion in the state in 2001. This amounted to about \$1,905 per state resident.

Table 9: Expenditures by Nonresident Travelers in Phillips County and in Montana

Distribution of Expenditures	Phillips County	Statewide
Lodging, campgrounds, etc.	19%	17%
Auto rental and repair, transportation	0%	4%
Gas and oil	28%	22%
Restaurant, bar	28%	18%
Groceries, snacks	5%	8%
Retail sales	19%	24%
Miscellaneous services	1%	6%
Total travel groups to sample area, 2001	197,00	3,938,000
Total expenditures in sample area, 2001 (2001\$)	\$2,469,000	\$1,718,500,000
Population (2000 Census)	4,601	902,195
Per capita expenditures in sample area, 2001 (2001\$)	\$536	\$1,905

Sources: ITRR, Montana Census and Economic Information Center³.

³ MT Department of Commerce, Census and Economic Information Center. Census 2000 Total Population: Counties. Accessed at <http://ceic.commerce.state.mt.us/C2000/PL2000/countypopulation9000/htm>.

Section II: The Resident Attitude Study

Methodology

A mail-back questionnaire was administered to a sample of Phillips County residents, as well as to a sample of statewide residents in the fall of 2001. The distribution followed an updated version of Dillman's Total Design Method (TDM)⁴, but differs only slightly from previous ITRR resident attitude surveys. The updates to the survey instrument and mailing sequence were implemented to improve the study's response rate, which dwindled in past years. This year, the response rate for Phillips County was 43 percent, while the statewide response rate was 40 percent.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a randomly selected sample of 500 Phillips County households, as well as 1,000 Montana households. The 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 with the most recent birthday be the one to complete the questionnaire.

One week following the questionnaire mailing, a postcard was sent to all selected households, serving the dual purpose of thanking respondents for their efforts if they had already returned their questionnaire, and reminding those who had set it aside to complete it 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 some concerns respondents 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.

A non-response bias check was not conducted at the conclusion of the sampling 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 could 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 reader is cautioned to bear in mind that the results presented are the opinions of only 43 percent of the Phillips County residents polled (Table 10). 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 July 1, 1999, Montana census estimates of age groups⁵, responses were weighted to more closely reflect the population of Phillips County. The results presented in this report reflect the adjusted dataset.

Table 10: Sample Sizes and Response Rates for 2000 Resident Attitude Survey

	Phillips County	Statewide
Resident questionnaires mailed out	500	1,000
Undeliverables	55	189
Usable resident questionnaires returned	190	328
Resident Attitude Study response rate	43%	40%

⁴ Dillman, Don A. 2000. *Mail and Internet Surveys: The Tailored Design Method*. John Wiley & Sons, Inc. New York, NY.

⁵ MT Department of Commerce, Census and Economic Information Center. Data set CO-99-13 "Population estimates for counties by age group: July 1, 1999". Accessed at ceic.commerce.state.mt.us/Demog/estimate/pop/County/mtcty99agegroup. 2000 Census data for county age groups unavailable at time of analysis.

Phillips County Residents' Attitudes

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

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

Respondent Characteristics

Age and gender: Respondents were asked to indicate their gender as well as their age (Table 11).

Phillips County: Forty-nine percent of respondents to the Phillips County survey were male, compared to the actual ratio for Phillips County of 50 percent. The average age was 50 years, and respondents ranged in age from 21 to 88 years.

Statewide: Of respondents to the statewide survey, 53 percent were male, compared to the actual statewide ratio of 50 percent. The average age was 47 years, slightly lower than for Phillips County, with the age range spanning 18 to 94 years.

Table 11: Age and Gender Characteristics

	Phillips County	Statewide
Average age	50 years	47 years
Minimum age	21 years	18 years
Maximum age	88 years	94 years
Percent male	49%	53%
Percent female	51%	47%

Residence: Survey subjects were asked if they were born in Montana, as well as how long they had lived in the state and in their community. Phillips County respondents were asked how long they had lived in their county (Tables 12 and 13).

Phillips County: Eighty percent of Phillips County respondents were native Montanans. On average, they had lived in the county for 37 years, and in the state for 44 years. Forty percent of respondents had lived in Phillips County longer than 40 years, while 13 percent had lived there 10 years or less.

Statewide: A little over half (53%) of statewide respondents were born in Montana. On average, they had lived in the state for 33 years and in their community for 24 years. Twenty-one percent had lived in their community longer than 40 years, while about one-third (34%) had lived there for less than 10 years.

Table 12: Residency Characteristics

	Phillips County	Statewide
Born in Montana	80%	53%
Mean years lived in community	37 years	24 years
Mean years lived in Montana	44 years	33 years
Age (mean years)	50 years	47 years

Table 13: Community Residency

	Phillips County	Statewide
10 years or less	13%	34%
11 to 20 years	9%	16%
21 to 30 years	19%	16%
31 to 40 years	19%	13%
41 to 50 years	15%	11%
51 to 60 years	12%	3%
61 years or more	13%	7%

Employment Status: A person’s employment status, type of job and sector of employment can all influence support for tourism development. In general, the more dependent a person is financially on the travel industry, the greater the support for tourism (Table 14).

Phillips County: The largest portion of respondents to the Phillips County resident attitude survey derived their income from the agricultural sector (34%). Other common sources of household income included education (19%), healthcare (15%), construction (14%) and services (13%). Four percent of respondents indicated that they were employed in the travel industry. However, employees in the service and retail sectors may unknowingly be part of the Montana travel industry.

Statewide: The most common sources of household income for statewide respondents were the service and education sectors (18% each). Other sources of household income included healthcare (17%), wholesale/retail trade (15%) and professional (15%). Approximately three percent of statewide household derived some portion of their household income from the travel industry. As may be the case for Phillips County, some of the statewide respondents who indicated that they are employed in the service and retail sectors may in fact be part of the travel industry.

Table 14: Source of Household Income

Sector	Percent of households deriving income from sector*	
	Phillips County	Statewide
Agriculture	34%	13%
Education	19%	18%
Healthcare	15%	17%
Construction	14%	13%
Services	13%	18%
Wholesale or retail trade	12%	15%
Professional	11%	15%
Finance, Insurance or Real Estate (FIRE)	8%	6%
Transportation, Communication or Utilities	8%	8%
Clerical	6%	7%
Forestry or forest products	5%	5%
Travel industry	4%	3%
Restaurant/bar**	4%	6%
Armed Services	3%	4%
Other	3%	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 lived in town (urban setting) or out of town (rural setting) (Table 15).

Phillips County: Fifty-eight percent of Phillips County residents indicated that they lived in town. Residents from rural areas made up 42 percent of the respondents.

Statewide: Over half of statewide respondents indicated that they live in town, leaving 43 percent who consider their residence to be rural, a relationship virtually identical to Phillips County.

Table 15: Place of Residence

	Phillips County	Statewide
In town (urban setting)	58%	57%
Out of town (rural setting)	42%	43%

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 ranked industries on a scale from 1 (most desired) through 8 (least desired) indicating which they felt would be most desirable for their community (Tables 16 and 17).

Phillips County: The majority (57%) of Phillips County respondents believe that the travel industry should have a role equal to other industries in the county economy, while 19 percent feel it should have a dominant role. Twenty-three percent favor a minor role for tourism in the local economy, while less than one percent feel it should have no role at all.

Tourism and recreation ranked fourth behind agriculture/agribusiness, retail/wholesale trade, and services as the most desired economic development opportunities for the county.

Statewide: Sixty-two percent of statewide respondents feel that tourism should have a role equal to other industries in their local economy, while 14 percent favor a dominant role. Twenty percent believe the industry should have a minor role, while 4 percent think it should have no role.

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

Table 16: Role of Tourism in the Local Economy

	Phillips County	Statewide
No role	<1%	4%
A minor role	23%	20%
A role equal to other industries	57%	62%
A dominant role	19%	14%

Table 17: Most Desired Economic Development

	Phillips County		Statewide	
	Rank	Mean*	Rank	Mean*
Agriculture/Agribusiness	1	2.31	3	3.60
Retail/Wholesale trade	2	3.23	4	3.71
Services	3	3.64	1	3.39
Tourism/Recreation	4	4.34	5	4.22
Manufacturing	5	4.65	6	4.51
Technology	6	4.77	2	3.42
Mining	7	5.29	8	7.09
Wood Products	8	6.78	7	5.68

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

Dependence on Tourism

Respondents were asked about the degree to which their place of work relied on tourists for its business (Table 18).

Phillips County: Six percent of Phillips County respondents indicated that their place of employment provides a majority of their products or services to tourists or tourist businesses. Fifty-seven percent work in a place that provides none of its products or services to tourists or tourist businesses.

Statewide: Only 7 percent of statewide respondents work in a place that provides a majority of its products or services to tourists or tourist businesses, whereas the largest portion of respondents (48%) employed in a place that provides none of its products or services to tourists or tourist businesses.

Table 18: Employment's Dependency on Tourists for Business

	Phillips County	Statewide
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	6%	7%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	37%	45%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	57%	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 19 and 20).

Phillips County: When asked about the frequency of their interactions with tourists, only 11 percent indicated that they have frequent contact with visitors. Over one-third (35%) reported that they have infrequent contact with tourists visiting Phillips County. Although the frequency of interaction is low, the vast majority (76%) of Phillips County residents enjoy meeting and interacting with tourists when the occasion arises. Only 1 percent of respondents do not enjoy meeting and interacting with visiting tourists.

Statewide: Sixteen percent of statewide respondents reported having frequent contact with tourists visiting their community. Twenty-seven percent indicated that they have somewhat frequent contact with tourists, and 31 percent said they have infrequent contact. Over two-thirds (68%) of statewide respondents reported that they enjoy meeting and interacting with tourists. Twenty-eight percent are indifferent about meeting and interacting with tourists, while 4 percent do not enjoy these interactions.

Table 19: Frequency of Contact with Tourists Visiting Community

Degree of Frequency	Phillips County	Statewide
Frequent contact	11%	16%
Somewhat frequent contact	22%	27%
Somewhat infrequent contact	31%	26%
Infrequent contact	35%	31%

Table 20: Attitude Towards Tourists Visiting Community

Attitude	Phillips County	Statewide
Enjoy meeting and interacting with tourists	76%	68%
Indifferent about meeting and interacting with tourists	23%	28%
Do not enjoy meeting and interacting with tourists	1%	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 12). Other measures are based on opinions that residents have about their community and perceived changes in population levels.

Community Attachment: To assess community attachment, respondents were asked to indicate their level of agreement 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 statement in question (Table 21).

Phillips County: The Index of Community Attachment (i.e. the mean of four community attachment statements) indicates that Phillips County respondents are attached to their community. An average rating of 0.48 shows these people, on a whole, like where they live. They were very positive in their feelings about their community, except in regard to opinions about the future. This item received a score of -0.82, indicating that Phillips County residents do not think the future of their community is bright.

Statewide: For respondents to the statewide survey, the Community Attachment Index produced a score of 0.76, considerably higher than that of Phillips County. It is safe to say that Montana residents, in general, are attached to their communities. However, as was the case with Phillips County respondents, statewide respondents also rated the future of their community much lower than the other items in the index. With a score of 0.26, it is barely positive, yet much more optimistic than for Phillips County.

Table 21: Community Attachment Statements

	Phillips County Mean*	Statewide Mean*
I'd rather live in my community than anywhere else.	0.84	0.78
If I had to move away from my community, I would be very sorry to leave.	0.72	0.76
I think the future of my community looks bright.	-0.82	0.26
It is important that the residents of my community be involved in decisions about tourism.	1.17	1.24
Index of Community Attachment**	0.48	0.76

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

** Index score is the mean 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 22 and 23).

Phillips County: Very few of Phillips County respondents (8%) feel that the county's population is not changing, while less than 1 percent feel it is increasing. The majority (91%) see the population of the county decreasing, and rightly so. The population of Phillips County decreased by 10.9 percent between 1990 and 2000⁶. Of those who feel the county's population is decreasing, 91 percent feel it is decreasing too fast.

Statewide: On the statewide level, 13 percent of respondents feel that the population of their community is unchanging. Sixty-four percent feel 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 seven percent feel the rate of decrease is too slow. How residents perceive population changes in the state is obviously a function of where in the state they live. Consequently, the statewide perception is not necessarily a good measure of comparison for the county-specific perception obtained from Phillips County. However, the statewide population increased by 12.9 percent between 1990 and 2000⁷.

Table 22: Perceptions of Population Change

	Phillips County	Statewide
Population is not changing	8%	13%
Population is increasing	<1%	64%
Population is decreasing	91%	23%

Table 23: Rate of Population Change

	Phillips County	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	91%	62%
Population is decreasing at the right rate	8%	31%
Population is decreasing too slowly	1%	7%

⁶ MT Department of Commerce, Census and Economic Information Center. [Census 2000 Total Population: Counties](http://ceic.commerce.state.mt.us/C2000/PL2000/countypopulation9000/htm). Accessed at <http://ceic.commerce.state.mt.us/C2000/PL2000/countypopulation9000/htm>.

⁷ Ibid.

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

The concept of "Quality of Life" can be broken down into several independent factors, including the availability and quality of public services, 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 towards this type of community development.

To this end, respondents were asked to rate the current condition of a number of factors that influence their 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 using a scale including -1 (negative influence), 0 (both positive and negative influence), and +1 (positive influence) (Tables 24 and 25).

Phillips County: Phillips County respondents indicated that they are very satisfied with quality of life variables in their community. The items receiving the most favorable ratings are the level of traffic congestion, museums and cultural centers, overall community livability and the local education system. Of these top items, only the level of traffic congestion is expected to deteriorate with increased tourism (-0.12). Overall community livability is expected to be both positively and negatively influenced by more tourism (53%), while both the education system and local museums and cultural centers are expected to be overwhelmingly positively influenced (79% and 95%, respectively).

The only item that was rated as being in poor condition was job opportunities. It received a mean score of -1.39 of a possible -2. However, the majority of respondents (77%) indicated that they expect increased tourism development to have a positive influence on this variable.

Tourism is also expected to have positive influence on parks and recreation areas, as well as local emergency services and infrastructure. Tourism is expected to have both positive and negative influence on safety from crime, overall cleanliness and appearance, cost of living, and the condition of roads and highways.

Statewide: With a few exceptions, statewide respondents were less satisfied with the current condition of quality of life than Phillips County respondents. However, their ratings are similar, with community livability and the condition of museums and emergency services both ranking high. The lowest ranking is the same as for Phillips County, with job opportunities and cost of living receiving the lowest scores.

Just as their Phillips County counterparts, statewide respondents expect tourism development to have a positive impact on museums and cultural centers, as well as on parks and recreation areas and job opportunities. Negative influence is expected for the level of traffic congestion and for the conditions of roads and highways. Obviously, there is a natural connection between the two aspects.

Statewide respondents indicated that they expect increased tourism to have both positive and negative impacts on most quality of life variables, including emergency services, community livability, the education system, safety from crime, cleanliness and appearance, local infrastructure, and cost of living.

Table 24: Quality of Life—Current Condition (Scale from -2 to +2)

	Phillips County Mean*	Statewide Mean*
Traffic congestion	1.47	0.44
Museums and cultural centers	1.44	0.84
Overall community livability	1.27	1.27
Education system	1.27	0.73
Safety from crime	1.15	1.02
Emergency services	1.05	1.19
Overall cleanliness and appearance	1.01	0.82
Parks and recreation areas	0.96	1.05
Infrastructure	0.72	0.56
Cost of living	0.35	0.00
Conditions of roads and highways	0.11	0.31
Job opportunities	-1.39	-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 variable.

Table 25: Quality of Life—The Nature of Tourism’s Influence (Scale from -1 to +1)

	Phillips County				Statewide			
	Negative Influence	Positive & Negative Influence	Positive Influence	Mean Score*	Negative Influence	Positive & Negative Influence	Positive Influence	Mean Score*
Traffic congestion	32%	47%	21%	-0.12	68%	24%	8%	-0.60
Museums and cultural centers	1%	4%	95%	0.94	1%	16%	83%	0.82
Overall community livability	4%	53%	43%	0.39	10%	63%	27%	0.17
Education system	3%	18%	79%	0.75	9%	50%	41%	0.31
Safety from crime	24%	53%	23%	-0.01	36%	49%	15%	-0.20
Emergency services	7%	46%	47%	0.40	16%	56%	28%	0.12
Overall cleanliness and appearance	10%	52%	38%	0.28	24%	48%	28%	0.03
Parks and recreation areas	6%	24%	70%	0.64	13%	40%	47%	0.33
Infrastructure	12%	42%	46%	0.34	30%	43%	27%	-0.02
Cost of living	19%	43%	38%	0.20	28%	49%	23%	-0.06
Conditions of roads and highways	15%	44%	41%	0.27	38%	34%	28%	-0.09
Job opportunities	8%	15%	77%	0.68	6%	28%	66%	0.60

* 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.

Perceived Connections Between Tourism and Community Life

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 26).

Phillips County: The majority of Phillips County respondents (92%) agree that tourism promotion and advertising to out-of-state visitors by the state of Montana is a good idea, and would like to see this continued. Over three-fourths (76%) feel that their community is a good place for tourism investment, while 87 percent indicated that they believe increased tourism will help their community grow in the right direction. Eighty-five percent of respondents also feel that any negative impacts of tourism are outweighed by its benefits. The majority (78%) of Phillips County respondents feel that tourism promotion by the state benefits the county economically, while almost two-thirds (62%) believe that jobs in the travel industry offer opportunities for advancement. Sixty-eight percent feel that overall quality of life for Montana residents will improve with increased tourism. On the flip side, a majority of respondents (61%) disagree that increased tourism will increase or secure their income, while 70 percent do not think it will lead to any financial benefit on their part.

Although Phillips County respondents feel increased tourism will not bring them any personal economic benefit, they still support tourism development in the area because they feel it will benefit their community. The Index of Tourism Support, i.e. the mean of the average score for each statement, equals 0.41, indicating that there is support for the travel industry in the county, despite the perceived lack of personal benefit to residents.

Statewide: On the whole, statewide respondents are less supportive of tourism and the travel industry than Phillips County respondents. The average score for each statement is consistently lower for statewide respondents than it was for Phillips County respondents. However, there is still an overall positive sentiment regarding tourism development. Eighty-one percent support continued tourism promotion and advertisement to out-of-state visitors, while 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 agree that increased tourism in the state will improve residents' quality of life.

Statewide respondents as well 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.

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 neutral score on the Index of Tourism Support. Overall, however, Montana residents support continued tourism promotion by the state even though they do not see a direct economic benefit from these efforts.

Table 26: Index of Tourism Support

	Phillips County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	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.	2%	6%	72%	20%	1.02	7%	12%	63%	18%	0.72
My community is a good place to invest in tourism development.	3%	21%	65%	11%	0.59	9%	26%	51%	14%	0.37
Increased tourism would help my community grow in the right direction.	1%	12%	73%	14%	0.85	8%	27%	53%	12%	0.35
The overall benefits of tourism outweigh the negative impacts.	2%	13%	70%	15%	0.83	4%	25%	62%	9%	0.47
Tourism promotion by the state of Montana benefits my community economically.	4%	18%	66%	12%	0.65	5%	17%	61%	17%	0.67
I believe jobs in the tourism industry offer opportunity for advancement.	5%	33%	57%	5%	0.23	10%	41%	43%	6%	0.00
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	5%	27%	62%	6%	0.37	10%	37%	49%	4%	0.00
If tourism increases in my community, my income will increase or be more secure.	16%	45%	34%	5%	-0.33	24%	38%	30%	8%	-0.39
I will benefit financially if tourism increases in my community.	20%	50%	26%	4%	-0.56	25%	45%	25%	5%	-0.60
Index of Tourism Support**	0.41					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 scores for each statement.

Index of Tourism Concern

The main issues of concern regarding tourism development deal with wage levels as well as 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 27).

Phillips County: Over three-fourths (78%) of Phillips County respondents believe that most tourism jobs pay low wages. Forty-five percent feel that tourists do not pay their fair share for the services they use, while 30 percent agree that vacationing in Montana influences too many people to move to the state. However, the vast majority (79%) does not feel the state is becoming too crowded because of tourists, and 81 percent feel that out-of-state visitors do not limit their access to recreation opportunities.

Despite the wage issue, Phillips County respondents are not too concerned when it comes to tourism development, as indicated by a -0.24 score for the Index of Tourism Concern. In this index, a higher score means a higher level of concern, and Phillips County respondents produced a negative score. Were it not for the wage issue, the score would have been even lower.

Statewide: In the area of tourism concern, statewide respondents show a slightly more negative attitude than do Phillips County respondents. The statements score higher for statewide respondents across the board, indicating a higher level of concern. Eighty percent feel that tourism jobs pay mostly low wages, while 55 percent feel that tourists do not pay their fair share for the services they use. Fifty-one percent feel that a Montana vacation influences too many people to move to the state. However, the majority (57%) does not perceive the state as having a problem with crowding, and 64 percent do not see their recreation opportunities limited by the presence of out-of-state visitors.

With higher scores in all categories, it is no surprise that the Index of Tourism Concern is higher as well. At 0.15, it indicates that there is some concern regarding tourism development in the state as a whole.

Table 27: Index of Tourism Concern

	Phillips County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I believe most of the jobs in the tourism industry pay low wages.	6%	16%	71%	7%	0.56	2%	18%	58%	22%	0.79
Tourists do not pay their fair share for the services they use.	3%	52%	32%	13%	0.00	4%	41%	38%	17%	0.24
Vacationing in Montana influences too many people to move to the state.	6%	64%	24%	6%	-0.40	8%	41%	32%	19%	0.12
In recent years, Montana is becoming overcrowded because of more tourists.	10%	69%	15%	6%	-0.61	11%	46%	30%	13%	-0.12
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	13%	68%	15%	4%	-0.73	11%	53%	23%	13%	-0.27
Index of Tourism Concern**	-0.24					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 28).

Phillips County: Ninety-one percent of respondents agree that there is adequate undeveloped open space in the county, but 35 percent are concerned about its potential disappearance. Sixty percent would support land use regulations to manage growth in the county, while 19 percent feel their access to recreation opportunities is limited due to the presence of out-of-state visitors.

Statewide: Among statewide respondents, 59 percent agree that there is adequate undeveloped open space in their community, while sixty percent is concerned about its disappearance. Over three-fourths (78%) of statewide respondents would support some form of land-use regulations to control the types of future growth in their community, while over one-third (36%) feel their recreation opportunities are limited due to the presence of tourists.

Table 28: Land Use Issues

	Phillips County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
There is adequate undeveloped open space in my community.	2%	7%	65%	26%	1.06	8%	33%	47%	12%	0.21
I am concerned with the potential disappearance of open space in my community.	11%	54%	27%	8%	-0.33	7%	33%	37%	23%	0.37
I would support land use regulations to help manage types of future growth in my community.	9%	31%	54%	6%	0.17	7%	15%	57%	21%	0.68
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	13%	68%	15%	4%	-0.73	11%	53%	23%	13%	-0.27

* 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 29).

Phillips County: Phillips County respondents feel strongly that residents should be involved in decision-making regarding local tourism development. Ninety-seven percent of respondents either agreed or agreed strongly that it is important that residents be involved in decisions about tourism, while 61 percent disagreed that decisions regarding tourism volume are best left to the private sector.

Statewide: On a statewide level as well, most respondents (92%) feel strongly that residents should be involved in the decision-making process when it comes to tourism development. Most disagree with the statement indicating that these decisions should be left entirely to the private sector (67%), indicating that community residents need to be involved at all levels.

Table 29: Tourism-related Decision-making

	Phillips County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*
It is important that residents of my community be involved in decisions about tourism.	1%	2%	72%	25%	1.17	2%	6%	51%	41%	1.24
Decisions about how much tourism there should be in my community are best left to the private sector.	11%	50%	32%	7%	-0.28	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 30 and 31).

Phillips County: The top advantage of tourism identified by Phillips County respondents was overall economic benefit. Eighty-two percent of respondents indicated more jobs, higher income and higher revenue for local businesses as the top advantages. In terms of disadvantages, 18 percent feel there are none associated with increased tourism, while 15 percent identify more crime as the chief problem caused by tourism growth. An additional 13 percent feel that more people moving to the area pose the greatest disadvantage.

Statewide: Statewide respondents also identified improved economic conditions as being the top advantage of increased tourism in their community (84%). In terms of disadvantages, people moving to the state after visiting was of concern to a large portion of statewide respondents (20%), as was traffic and crowding (19%).

Table 30: Advantages Associated with Increased Tourism

	Phillips County		Statewide	
	Number of Responses*	Percent of Responses**	Number of Responses*	Percent of Responses**
Economic benefit	147	82%	236	84%
More businesses	16	9%	--	--
No advantage	5	3%	18	6%
More people moving to community	3	2%	4	1%
New accommodations (hotel/motel)	2	1%	--	--
New ideas	2	1%	--	--
Community pride	1	<1%	--	--
New way of life	1	<1%	--	--
Less dependence on tax payers	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 data set.

Table 31: Disadvantages Associated with Increased Tourism

	Phillips County		Statewide	
	Number of Responses*	Percent of Responses**	Number of Responses*	Percent of Responses**
No disadvantage	29	18%	37	13%
Increased crime	24	15%	11	4%
People moving here	20	13%	57	20%
Crowding/traffic	16	10%	53	19%
More demand for services	11	7%	--	--
Pollution/noise pollution	10	6%	14	5%
Lifestyle changes	9	6%	--	--
Attention focused on tourists	8	5%	--	--
Overuse of resources, environmental impacts	8	5%	--	--
Low-wage jobs	5	3%	--	--
Land use restrictions	5	3%	--	--
No aid to tax base	4	2%	--	--
Increased prices	3	2%	11	4%
Seasonal benefits, only benefits a few	2	1%	--	--
Increased fees	2	1%	--	--
Need for road improvements	2	1%	--	--
Few regulations	1	<1%	--	--
Higher income	1	<1%	--	--
Loss of small town atmosphere	1	<1%	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 data set.

Questions Specific to Phillips County

The Phillips County CTAP committee was given the opportunity to include questions specific to their region on the Resident Attitude questionnaire. The responses to these questions and other community-specific items are reported below.

Phillips County Characteristics

The following three items deal with characteristics, both positive and negative, of Phillips County. The questions were asked in an open-ended format to solicit residents' true feelings, and responses reflect the respondents' own wording. The answers are used in the visioning part of the CTAP, where residents make development plans for the future (Tables 32, 33 and 34).

Valued characteristics of Phillips County: Respondents were asked what characteristics of Phillips County they value and would like to see continued into the future. At the top of the list was the open-mindedness and friendliness of the community (20%), but residents also appreciate the area's small-town atmosphere (13%) and the sense of community (11%).

Table 32: Valued Characteristics of Phillips County

Characteristics	Number of Responses*	Percent of Responses**
Open-minded, friendly	51	20%
Small-town atmosphere	33	13%
Sense of community	28	11%
Safety	24	10%
Hunting and fishing	16	6%
Few people/current population size	15	6%
Open space	15	6%
Agriculture	15	6%
Exciting businesses	10	4%
Family oriented	9	4%
Schools, health care	8	3%
Recreation opportunities	8	3%
Museum	5	2%
History	5	2%
Mining, timber extraction	4	2%
Tourism	3	1%
Cost of living	1	<1%
Foreign exchange program	1	<1%
Clean	1	<1%
The Little Arts Association	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 data set.

Disliked characteristics of Phillips County: Planning for desired conditions is one thing, but it is also important to avoid undesirable conditions. Proper planning can help in this area. To that end, respondents were asked to identify what characteristics of Phillips County they dislike and would not like to see continued into the future. The primary concern turned out to be business closings with associated job cuts (26%), but 18 percent are concerned with young people moving away from the county, and another 11 percent worry about closed-mindedness and racism of county residents.

Table 33: Disliked Characteristics of Phillips County

Characteristics	Number of Responses*	Percent of Responses**
Businesses closing, job cuts	43	26%
(Young) people moving away	29	18%
Closed-mindedness, racism	17	11%
Low wages, high prices	12	8%
Out-of-towners, population increases	9	6%
Gambling, drinking, drug use	9	6%
Government involvement	8	5%
Decline in agriculture	8	5%
Environmentalists	5	3%
Mining	4	3%
Crime	4	2%
Run-down buildings, litter	3	2%
Roads	2	1%
Welfare recipients	2	1%
Development of natural resources	2	1%
Hunting	1	1%
Lack of customer service	1	<1%
School athletics	1	<1%
Pollution	1	<1%
Tourism	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 data set.

Missing characteristics of Phillips County: Another facet of planning, in addition to learning what should be kept and what should be avoided is finding out what positive aspects that can be developed within the community. In response to the question of what is missing from Phillips County that residents would like to see in the future, the top vote getter was “industry, businesses” (39%), followed by “more jobs/better wages” (18%). Obviously the two are closely related. An additional 7 percent would like to see more people in the county.

Table 34: Characteristics Missing from Phillips County

Characteristics	Number of Responses*	Percent of Responses**
Industry, businesses	75	39%
More jobs, better wages	34	18%
More people	14	7%
Improved roads	11	6%
Attractions	10	5%
Good economy	9	5%
Mining	7	4%
Community involvement	7	3%
Services (health, education, etc.)	5	3%
Environmental management	3	2%
Tourism	2	1%
Lower taxes	2	1%
Retirement services	2	1%
Agriculture support	2	1%
Culture	2	<1%
Open-mindedness	1	<1%
Safety	1	<1%
Government leadership	1	<1%
Expanded museum	1	<1%
Restoration of buildings	1	<1%
Wildlife	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 data set.

Hunting and Fishing Activities

One of the options that Phillips County has in terms of development to attract more tourists is to capitalize on the hunting and fishing opportunities in the area. This type of development can be controversial because some local residents may not wish to see other people—“outsiders”—at their fishing holes and in their hunting spots. The local action committee suggested that while an increase in the number of visitors attracted to the area by these activities may be welcomed by those who do not hunt or fish, the increase may be opposed by others who do. To address this concern, the Resident Attitude survey included questions to determine the portion of the sample engaged in hunting and fishing activities, as well as questions to determine if the level of support for more visitors differs between those who do participate and those who do not (Tables 35 and 36).

Of the Phillips County respondents, 58 percent indicated that they participate in hunting activities. The corresponding figure for fishing activities was 64 percent.

When asking all respondents if they would want more visiting hunters and fishermen in the county, 49 percent answered that they would welcome more hunters and 63 percent indicated that they would welcome more fishermen. Interestingly enough, these figures changed only marginally when the questions were asked of those who hunt and of those who fish. Of residents who hunt, 48 percent indicated that they would welcome more hunters in the county. Of those who fish, 63 percent would still welcome additional fishermen.

Clearly, while there is a substantial portion of the population who does not support an increase in the number of hunters and fishermen visiting the community, this opposition does not seem to be determined by their own participation in hunting and fishing activities.

Table 35: Phillips County Residents Who Participate in Hunting and Fishing

	Yes	No
Hunting	58%	42%
Fishing	64%	36%

Table 36: Acceptability of More Visiting Hunters or Fishermen in Phillips County.

	Yes	No
Overall...		
Welcome more hunters	49%	51%
Welcome more fishermen	63%	37%
If they hunt...		
Welcome more hunters	48%	52%
If they fish...		
Welcome more fishermen	63%	37%

Infrastructure and Facilities Improvements

Another concern that has been voiced in Phillips County with regards to increased visitor numbers is that of carrying capacity: can the county handle a larger influx of people? While a physical assessment would answer this question more accurately, the perceptions that residents hold figures into their attitude towards tourism development. Additionally, suggestions based on these perceptions may also be valuable to businesses in the county (Table 37).

Topping the list of needed infrastructure and facility improvements is road repairs. Both the county highways, as well as the county roads that access recreation areas are indicated as needing improvements (57% and 47%, respectively). Thirty-two percent see the need for an improved tourist information center. Emergency services and health services received the least votes for improvements (21% and 20% each), indicating that residents are largely satisfied with the current condition of these services, as is also indicated in Table 24.

Table 37: Infrastructure/Facility Improvements Needed in Phillips County

Suggested Improvements	Percent
Highway system	57%
County roads to access recreation areas	47%
Tourist information center	32%
More hotel/motels	26%
More restaurants	22%
Emergency services	21%
Health services	20%

Phillips County Attractions

To try and get an idea of what Phillips County has to offer its visitors, residents were asked what local attractions and events they have visited. As a follow-up, they were also asked which of these attractions and events they would recommend to visiting friends and relatives. The questionnaire contained an extensive list of Phillips County attractions and events (Table 38).

The majority of Phillips County attractions are well-visited by residents, the most popular ones being the Phillips County Fair (97%), the Nelson Reservoir (94%), and the Little Rockies (93%). The lowest visitation rate reported is for the Lewis and Clark Encampment (23%), primarily due to the fact that it is only in its 4th year of operation. Ninety-eight percent of respondents referred to private businesses in the county which they considered “attractions” for one reason or other. A complete list of the businesses mentioned can be found in Appendix B.

Those who had visited these various attractions and events were asked whether or not they would recommend them to visiting friends and relatives. The responses constitute a sub-set of the original respondents and as such, a smaller sample. However, the responses were overwhelmingly positive and supportive of what Phillips County has to offer. Most items received a very high recommendation rate. Phillips County Museum, for example, is recommended by 100 percent of those who have visited it. The Little Rockies are recommended by 99 percent, while 98 percent of respondents would recommend elk viewing on the Missouri River, visiting Forchette Bay, and visiting the James Kipp Recreation Area. Ninety-eight percent would also recommend visiting the various private businesses referred to in the previous question. The activity that scored the highest in the “Would not recommend” category was varmint hunting (24%), followed by hiking (20%) and golfing (16%).

Table 38: Phillips County Attractions

Attractions	Visited/Participated in		Would recommend	
	Yes	No	Yes	No
Various private businesses*	98%	2%	98%	2%
Phillips County Fair	97%	3%	96%	4%
Nelson Reservoir	94%	6%	88%	12%
Zortman/Landusky (Little Rockies)	93%	7%	99%	1%
Bowdoin Wildlife Refuge	87%	13%	97%	3%
Tafton Arena	82%	18%	96%	4%
Outlaw Days	81%	19%	93%	7%
James Kipp Recreation Area	80%	20%	98%	2%
Phillips County Museum	80%	20%	100%	--
Fishing	76%	24%	95%	5%
Hunting	67%	33%	93%	7%
Elk viewing area on the Missouri River	63%	37%	98%	2%
Forchette Bay	62%	38%	98%	2%
Saco Fun Days	57%	43%	97%	3%
Varmint hunting	45%	55%	76%	24%
Hiking	39%	61%	80%	20%
Golfing	34%	66%	84%	16%
Lewis and Clark Encampment	23%	77%	95%	5%

* See Appendix B for complete listing.

New Phillips County Attractions

The following is a list of suggestions for attractions that could realistically be established in Phillips County in order to encourage more tourists to stop. This question was given in an open-ended format to allow for maximum respondent creativity (Table 39).

The most popular suggestion was the establishment of a dedicated dinosaur operation, be it a museum or regularly scheduled digs (13%). Eleven percent of respondents suggested car racing, and nine percent each suggested developing the Sleeping Buffalo Resort, establish a bakery, and a recreation center.

Table 39: New Attractions to Establish in Phillips County

Attractions	Number of Responses*	Percent of Respondents**
Dinosaur digs/museums	13	13%
Car racing	11	11%
Sleeping Buffalo Resort	9	9%
Bakery	9	9%
Recreation Center	9	9%
Rodeo Arena	8	8%
Azure Caves	6	6%
Little Rockies	4	4%
Open farms, ranches to recreation	3	3%
ATV area	3	3%
Boat tour of Fort Peck	2	2%
Water park, pool	2	2%
Concessions	2	2%
County Fair	2	2%
Theme park	2	2%
Missouri River float trips	2	2%
Robinson House	2	2%
Information Center	2	2%
Camping area	2	2%
Convention center	1	1%
Canadian/American cooperative center	1	1%
Eco tours	1	<1%
Frontier town	1	<1%
Fort Belknap	1	<1%
Summer camp/youth camp	1	<1%
State prison	1	<1%
Ferret statue on highway	1	<1%
Library	1	<1%
Bowling alley	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 data set.

Making Phillips County a Destination, Not a Stop-Over

Current visitors to Phillips County are frequently on their way to somewhere else and stopping in the county just for the night, if they stop at all (of those who drive through Phillips County in a year, only 12 percent are captured for the night). The Resident Attitude questionnaire solicited suggestions as to how the county can be made into a destination rather than a stop-over. This question was open-ended as well (Table 40).

Thirteen percent of respondents suggested that the best way to turn Phillips County into a destination is to advertise more. Eleven percent each suggested more commercial tourism and more development. Promoting bed & breakfasts and ranch vacations was suggested by nine percent, while seven percent suggested promoting fishing and hunting.

Table 40: Ways to Turn Phillips County Into a Destination

Suggestions	Number of responses*	Percent of responses**
Advertise more	14	13%
Commercial tourism	12	11%
More development	11	11%
Bed & Breakfast, ranch vacations	10	9%
Fishing and hunting	7	7%
(Multi -day) events	6	6%
Dinosaur related development	6	6%
Improve highway, roads	5	5%
Lewis & Clark encampment, history	5	4%
More RV camping, more camping amenities	5	4%
Beautify	4	4%
Museums	4	4%
Lower prices	3	3%
Offer more recreation opportunities	3	3%
Wildlife refuge	3	3%
Family focus	2	2%
Longer business hours	1	<1%
Improved signage for areas of interest	1	<1%
Western heritage	1	<1%
Buffalo	1	<1%
Year-round rest area	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 data set.

General Comments

Respondents were provided with 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, and thus they deal with a wide variety of issues. For the sake of simplifying analysis, the comments were assigned to general categories, but even so, there is little consensus among them (Table 41). For a list of comments cited verbatim, please see Appendix C.

Table 41: General Comment Categories by Phillips County Respondents

Comment Category	Number of Responses*	Percent of Responses**
Pro-tourism with reservations	4	16%
Description of town	4	14%
Suggestions for tourism development	3	11%
Pro-tourism statements	3	10%
Natural resource issues	3	9%
Suggestions for non-tourism development	2	9%
Way of life	2	8%
Need for community effort/open-mindedness	1	4%
Improve cleanliness to improve first impression	1	4%
Opposed to tourism	1	3%
Beautiful area/landscape	1	3%
Lack of local history	1	3%
Road conditions	1	3%
Charging fees changes things	1	2%

* 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 data set.

Please include any additional comments below:

Resident Attitudes Toward Tourism in Phillips County



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 tourism industry and the role you think it should have in the Phillips County economy.

1 How much contact do you have with tourists visiting Phillips County? Please use a checkmark (?) 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 Phillips County? 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 at least 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 Phillips County? 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 Phillips County? Please rank options 1 through 8, with 1 being the most desired.

- | | |
|------------------------|---|
| ___ Mining | ___ Agriculture/Agribusiness |
| ___ Wood Products | ___ Retail/Wholesale Trade |
| ___ Manufacturing | ___ Services (health, businesses, etc.) |
| ___ Tourism/Recreation | ___ Technology |

6 In your opinion, how is the population changing in Phillips County? 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 Phillips County is changing, how would you describe the change? Please ? your answer.

- Too fast
- About right
- Too slow

PART 2. The following questions are specific to Phillips County. Please share your thoughts and opinions as they will be helpful in making responsible decisions for your community.

1 What characteristic of Phillips County do you value and would like to see continued into the future?

2 What characteristic of Phillips County would you prefer not to see continued into the future?

3 What is missing from Phillips County that you would like to see in the future?

4 Do you participate in hunting or fishing activities? Please use a checkmark (?) to indicate your answer.

- | | | |
|---------|------------------------------|-----------------------------|
| Hunting | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Fishing | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

5 Would you want more visiting hunters or fishermen in Phillips County? Please ? your answer.

- | | | |
|----------------|------------------------------|-----------------------------|
| More hunters | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| More fishermen | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

6 What infrastructure/facility improvements would be needed to enable Phillips County to handle more visitors? Please use checkmarks (?) to indicate your choices.

- | | |
|--|---|
| <input type="checkbox"/> Highway improvements | <input type="checkbox"/> Health services |
| <input type="checkbox"/> More restaurants | <input type="checkbox"/> Emergency services |
| <input type="checkbox"/> More hotels/motels | <input type="checkbox"/> Tourist information center |
| <input type="checkbox"/> County roads to access recreation areas | |

7 Which of the following Phillips County attractions have you visited or participated in, and which would you recommend to your visiting family and friends? Please circle your responses.

	<u>Have Visited</u>		<u>Would Recommend</u>	
	Yes	No	Yes	No
Phillips County Museum	Yes	No	Yes	No
Trafton Arena	Yes	No	Yes	No
Bowdoin Wildlife Refuge	Yes	No	Yes	No
Nelson Reservoir	Yes	No	Yes	No
Elk Viewing Area on the Missouri River	Yes	No	Yes	No
Zortman/Landusky (Little Rockies)	Yes	No	Yes	No
Lewis and Clark Encampment	Yes	No	Yes	No
Varmint Hunting	Yes	No	Yes	No
Forchette Bay	Yes	No	Yes	No
James Kipp Recreation Area	Yes	No	Yes	No
Fishing	Yes	No	Yes	No
Hunting	Yes	No	Yes	No
Golfing	Yes	No	Yes	No
Hiking	Yes	No	Yes	No
Outlaw Days	Yes	No	Yes	No
Saco Fun Days	Yes	No	Yes	No
Phillips County Fair	Yes	No	Yes	No
Private Businesses: _____	Yes	No	Yes	No

(Please Specify)

8 There may be opportunity to establish other attractions in Phillips County to encourage more tourists to stop here. Do you have an idea for such an attraction that can be realistically developed in your community?

9 Members of your community have discussed ways to turn Phillips County into a destination for tourists, rather than a stop-over on the way to somewhere else. Can you suggest ways to accomplish this?

PART 3. Questions concerning quality of life in Phillips County

1 Please rate the current condition of each of the following elements of quality of life in Phillips County. 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

2 Please indicate how you think the following elements of quality of life would be influenced if tourism were to increase in Phillips County. 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 Phillips County and in the state of Montana. Please circle your answers.

	Strongly Disagree	Disagree	Agree	Strongly Agree
I'd rather live in Phillips County than anywhere else.	1	2	3	4
If I had to move away from Phillips County, I would be very sorry to leave.	1	2	3	4
I think the future of Phillips County looks bright.	1	2	3	4
Phillips County is a good place to invest in new tourism development.	1	2	3	4
Increased tourism would help Phillips County grow in the right direction.	1	2	3	4
It is important that the residents of Phillips County be involved in decisions about tourism.	1	2	3	4
Decisions about how much tourism there should be in Phillips County are best left to the private sector.	1	2	3	4
There is adequate undeveloped open space in Phillips County.	1	2	3	4
I am concerned about the potential disappearance of open space in Phillips County.	1	2	3	4
I would support land use regulations to help manage types of future growth in Phillips County.	1	2	3	4
Tourism promotion by the state of Montana benefits Phillips County economically.	1	2	3	4
If tourism increases in Phillips County, my income will increase or be more secure.	1	2	3	4
I will benefit financially if tourism increases in Phillips County.	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

4 In your opinion, what is the primary advantage of increased tourism in Phillips County?

5 In your opinion, what is the primary disadvantage of increased tourism in Phillips County?

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 Phillips County? _____ years in Phillips County

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

3 What is your age? _____ your age in years

4 Where in Phillips County do you live? Please use a checkmark (?) 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.

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

The following are private businesses mentioned as write-ins in Part 2, question 7 of the Resident Attitude Questionnaire.

- Promises
- Pay N' Save Grocery
- Town and Country Store and Cafe
- Milk River Wagon Train
- Albertson's
- West Side Café
- Trafton Park
- Sleeping Buffalo Hot Springs
- Matt's Alignment and Brakes
- High Line Packing
- Family Matters
- The Liquor Haven
- Circle V Café
- Beaver Creek Trail Rides
- Edgewater Inn
- Stockman Bar and Steakhouse
- Big Sky Beef
- Villa Theater

Appendix C: Verbatim Phillips County Comments

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

- I was very impressed with the potential and beauty of the area...very disappointed with the destruction and loss of the history.
- If you take away our rights to go on BLM lands you can forget about tourism. Why don't dirt roads get graded more than once per year?
- It is very important that Phillips County embrace change and be willing to work together for the betterment of the future. No one town can hog the tourist or government monies, but we must realize that what is good for our neighbor is good for ourselves.
- We have met a lot of good people over the years but I feel that once you charge for something, everything changes.
- I have small patience with the, "lock it up policy." I can't walk in anymore. Tourism is fine, just don't bug me!
- Tourism is ok, but don't cry when the natural elements of Montana keep people away. No rain, cold, fires etc. All businesses must be managed such they can handle the west environmental conditions.
- I prefer the rugged plains of eastern Montana to any of Montana's mountain regions. I like each season here. There are extremes in weather, but so many bright, sunny clear days.
- As I think of tourism, I think of all these issues facing Montana. Anything that interferes with the people's way of life I have lived here on the same farm all my life. Now, if a President declared my farm a National Monument and said I had to leave, War would break out in Montana.
- I worked for the city taking care of buildings and parks. The parks improved some while I was working. They improved some later we do have vandalism from time to time, but not a great deal.
- I visited Alaska last summer & have relatives who have lived there for many years. They admit they get tired of tourists, but boy do they promote tourism, and they admit its what keeps them going financially.
- As stated before I am not against tourism but feel that this type of low wage part time work is not going to help with our economic doldrums. I feel we should push more for the recreation dollars.
- We have lots of bentonite in the county. We should be promoting it again. We need more gas & oil exploration. Encourage tourists to look for dinosaurs.
- We have an active Historical Society that has developed one of the nicest museums for any small town in the state. It deserves a helping hand from Tour MT.
- Before retiring I was on a ranch in S. Phillips Co. Then I went into real estate. Have had lots of contact with hunters, fishing & new comers to community.
- If tourism is to increase in Phillips County - Malta - then the restaurants need to improve their appearances & cleanliness. I can only think of 2 places that are clean and appealing to eat in. We need to make a good first impression.
- If you really want to do something, you could tell us why the bentonite plant (we have one of the biggest deposits in world) was closed. Also the Zortman gold mines being closed has put dozens of houses on the market to nowhere.
- The only way we will truly benefit from tourism is if we can set a sales tax to help offset any negatives, pay for extra services needed, and to help support education.
- Phillips County is a special place to live and raise a family. Its specialness comes from the people living here; caring and generous individuals and groups.
- Tourism is double edged. I am for it, but would like safeguards in place.