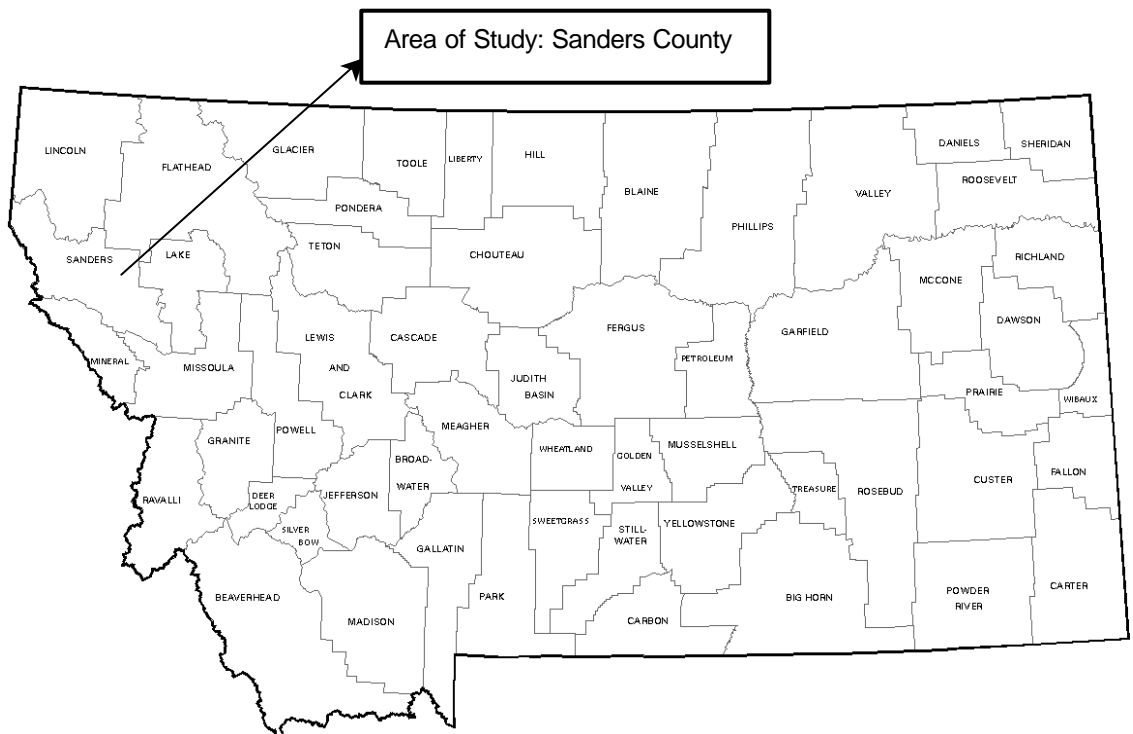

Sanders County, MT Resident Attitudes:

Exploring Tourism Development Potential

CTAP 2002-2003



Research Report 2003-3
March 2003

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Executive Summary

This report presents information about tourism in Sanders County, Montana. The report offers estimated travel volume and traveler characteristics for visitors to Sanders County, as well as the results of a Sanders County resident attitude survey, providing residents' opinions and attitudes regarding tourism and tourism development in the state and in County, along with the results of a statewide survey for comparative purposes.

A mail-back questionnaire was administered to a randomly selected sample of 575 Sanders County households during October and November 2002, and to a statewide sample of 1,000 Montana households during the same period in 2001. 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 (2001 Nonresident Survey Data and 2002 Visitor Estimates):

- In the 2002 summer season, over 2.3 million travel groups visited Montana. Of those, approximately 93,400 (4%) passed through Sanders County.
- Over \$1.8 billion was spent statewide in 2002 by nonresident travelers. This figure amounts to approximately \$1,994 for every Montana resident.
- In Sanders County, nonresident visitors spent close to \$7.5 million, or about \$714 per county resident.
- Travelers to Sanders County stayed in the state over twice as long as statewide visitors.
- Sanders County visitors traveled mainly as families, but also by themselves.
- Overnight visitors to Sanders County were less likely than statewide visitors to stay in a hotel or motel, but much more likely to stay in a campground (mainly public).
- Thirty-seven percent of Sanders County overnight visitors had an annual income of \$40,000 or more, compared to 77 percent for statewide visitors.
- Fifty-eight percent of overnight visitors to Sanders County were in Montana primarily for vacation, while 12 percent were primarily passing through the state.
- Nearly half of vacationers in Sanders County were attracted to Montana because of open space.
- Day hiking was the most popular activity for overnight visitors to Sanders County, followed by wildlife watching and camping.
- Visitors to Sanders County spent the largest portion of their money on licenses and fees, and in restaurants/bars.

RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM (2002 Resident Attitude Data):

- Residents from Sanders County have lived in their community (24 years) and in the state (32 years) for about the same length of time as the statewide residents.
- Native Montanans comprised 42 percent of the Sanders County sample.
- The largest portion (28%) of Sanders County respondents earn their household income in the forest products and service sectors.
- Sanders County respondents were mixed about the role of tourism in the local economy, and ranked the tourism and recreation industry 7th on a list of eight desired economic development options.
- Most Sanders County respondents work in places that supply little or none of their products or services to tourists or tourist businesses.
- Two-thirds of Sanders County respondents have either frequent or somewhat frequent contact with tourists, and about half of respondents enjoy interacting with tourists.
- Sanders County respondents have about the same attachment level (fairly strong) to their community than do statewide respondents. Both groups are somewhat concerned about the future of their communities.
- Ninety-six percent of Sanders County respondents feel that the population in the area is increasing, and of those, most feel it is increasing at the right rate.
- Sanders County respondents feel that tourism can enhance their quality of life through improving the condition of museums and cultural centers, as well as parks and recreation areas and job opportunities.

- Support for local tourism development is somewhat negative, contrary to modest support from the statewide sample.
- Respondents feel strongly that any decision about tourism development should involve local residents and not be left entirely to the private sector.

CONCERNS OF SANDERS COUNTY RESIDENTS (Based on 2002 Survey Data):

- Sanders County respondents value the county's open space and rural lifestyle and would like to see these characteristics continued into the future.
- Sanders County respondents dislike some of the area's haphazard building developments, as well as some of the new residents to the county.
- Respondents feel industry and manufacturing are missing from the area in addition to jobs with good wages.
- When prompted for ideas for a new image for Sanders County, the largest portion of respondents suggested emphasizing how the county is a nice place to live and work.
- The scenery of the county and Ross Creek Cedars are the top two attractions for residents to show visitors.
- Fishing, hiking, and boating were the top three recreation activities by residents and visitors.
- Less than one-quarter of Sanders County respondents believe that Glacial Lake Missoula should be promoted in the county.
- Twenty-two percent of respondents preferred presenting Sanders County history through museums.
- Overall economic benefit is perceived as the primary advantage of increased tourism in Sanders County, while increased crowding and traffic are seen as the leading disadvantages.
- Over half of Sanders County respondents agreed that improvements to public restrooms were needed to handle increases in county tourists.

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Introduction

This report is intended to provide a profile of current visitors to Sanders County, as well as resident attitudes regarding tourism and the travel industry in the area. It combines the results of three different studies and is presented in two sections.

Section one contains local nonresident visitor profiles, as well as profiles for statewide visitors. The visitor profiles were developed using research conducted by ITRR during the summer of 2001¹, and are based on the subset of surveys submitted by nonresident travelers who spent a night in the county. Due to sample size limitations, the reader should be cautioned about the generalizability of the Sanders County data in this section to the greater population.

The second part of this report, Section two, contains an assessment of resident attitudes toward tourism and the travel industry in Sanders County. This assessment is the result of mail-back questionnaires obtained from households in the County. It is provided side by side with the same information collected at the state level in 2001 to provide a comparison between resident opinions toward tourism in Sanders County and in Montana as a whole.

The information in this report was gathered as part of the Community Tourism Assessment Process (CTAP), which is conducted in three Montana communities each year. Sanders County was selected for the 2002/2003 CTAP, together with St. Ignatius and the Tobacco Valley.

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 Nickerson, N. and T. Dillon. 2002. Nonresident Summer Visitor Profile. Research Report 2002-5, Institute for Tourism and Recreation Research, School of Forestry, The University of Montana, Missoula, MT. 35pp.

Section 1: The Nonresident Travel Study

Methodology

Travelers to Montana during the summer season of 2001 (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 were obtained through a mail-back diary questionnaire administered to a sample of intercepted travelers in the state (Table 1). During the four-month study period, 7,362 groups were delivered survey questionnaires. Usable questionnaires were returned by 2,931 groups, resulting in a response rate of 40 percent. A sample of 119 respondent groups traveled through Sanders County in the summer of 2001.

Table 1: Sample Sizes and Response Rates for the 2001 Summer Nonresident Travel Study

Deliverable questionnaires to nonresident groups	7,362
Usable questionnaires returned	2,931
Nonresident Travel Study response rate	40%
Sanders County sample size	119
Percent of nonresident sample	4%

A Profile of Current Summer Visitors

ITRR nonresident travel estimates report that approximately 2,153,200 groups visited Montana during the 2001 **summer** season². 2001 nonresident survey data indicate that each travel group averages 2.5 people. It was estimated that 4 percent, or 86,120, of those groups passed through Sanders County, and that 19 percent of those who traveled through spent at least one night in the county.

Group Characteristics

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

Sanders County: Most Montana visitors who spent at least one night in Sanders County traveled as family (36%), while 27 percent traveled alone. Ninety percent of travelers had visited Montana before this trip, and 38 percent of them had lived here in the past. Visitors stayed in the state for an average of 9 nights, and the largest portion of summer visitors chose to spend their nights at a public campground (43%). Most respondents indicated having an income of over \$20,000 per year, with 2 percent making over \$100,000.

Statewide: For visitors to the state as a whole, the largest portion traveled as couples (41%), followed by those who traveled as family (32%). Seventy-six percent were repeat visitors, but only 16 percent had previously lived in the state. Average length of stay equaled 4.2 nights, less than half that of Sanders County visitors. A typical visitor to Montana was most likely to stay in a hotel or a motel (46%) and have an income exceeding \$60,000 per year. A full 21 percent indicated making over \$100,000 per year, while 7 percent indicated making less than \$20,000 per year.

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 2001, applied to the estimated number of travelers and their total economic impacts for 2002.

Table 2: Characteristics of Nonresident Summer Visitors

	Sanders County*	Statewide
Group Type		
Couple	17%	41%
Family	36%	32%
Alone	27%	14%
Friends	17%	6%
Family & friends	4%	5%
Business associates	--	1%
Organized group	--	1%
Have previously visited Montana	90%	76%
Have previously lived in Montana	38%	16%
Nights spent in Montana	9.13	4.2
Accommodations used in Montana**		
Hotel or motel	26%	59%
Home of friend or relative	18%	21%
Public campground	43%	16%
Private campground	8%	18%
Private cabin/2 nd home	1%	4%
Resort/condo	--	5%
Guest ranch	--	4%
Rented cabin/home	--	3%
Other	4%	3%
Income		
Less than \$20,000	36%	7%
\$20,000 to \$39,999	27%	17%
\$40,000 to \$59,999	17%	25%
\$60,000 to \$79,999	14%	20%
\$80,000 to \$99,999	4%	11%
Over \$100,000	2%	21%

Source: ITRR 2001 Nonresident Study

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

** Percentages do not add to 100 because respondents could indicate more than one response category.

Origin of Nonresident Visitors: Overnight visitors to the state as well as to Sanders County were from a variety of origins. However, the sample size for overnight visitors to Sanders County was too small to determine a reliable distribution. For statewide visitors who spent at least one night, Washington was the most common state of origin, followed by California, Idaho and Minnesota (Table 3).

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

Rank*	Sanders County	Statewide
1		Washington
2		California
3		Idaho
4	N/A	Minnesota
5		UT, ND, OR, WY, CO, ALB

Source: ITRR 2001 Nonresident Study

* 1=highest frequency

Information Sources

Nonresident travel groups, including those visitors who did not spend a night, indicated which information sources were used as planning tools for their trip *prior* to arriving in Montana, as well as while they were *visiting* Montana. Also, respondents indicated which of the sources were most useful to them. A list of 9 pre-trip and 5 Montana information sources was included in the questionnaire (Tables 4 and 5).

Sanders County: The three most frequently used sources of travel information (Table 4) were the Internet (35%), AAA (29%), and chambers or visitor bureaus (19%). The most useful sources of travel information used prior to arriving in Montana were the Internet (54%), chambers or visitor bureaus (35%), and travel guide books (10%). Fifty-one percent of visitors to Sanders County did not use any of the listed sources prior to their trip, likely because many of these people had been to the area before.

Statewide: For statewide visitors, the three most frequently used sources of travel information included the Internet (43%), AAA (26%), and National Park brochures (18%). The most useful sources of information used prior to travel were the Internet (38%), AAA (25%), and travel guide books (10%). Thirty-four percent of statewide visitors did not use any of the nine listed information sources prior to travel.

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

Information Sources	Sanders County		Statewide	
	All Sources*	Most Useful Source	All Sources*	Most Useful Source
The Internet	35%	54%	43%	38%
AAA	29%		26%	25%
Chamber or visitor bureau	19%	35%	9%	5%
Travel guide book	11%		14%	10%
Information from private businesses	5%	10%	9%	7%
Montana Travel Planner	--		9%	6%
National Park brochure	--		18%	7%
1-800 State travel number	--		2%	1%
Travel agency	--		4%	3%
None of the sources	51%	N/A	34%	N/A

Source: ITRR 2001 Nonresident Study

* Visitors could indicate more than one information source.

Bold percentages indicate top three responses.

Sanders County: Visitors were also asked where they received travel information while *visiting* Montana (Table 5). The travel information sources that were used included highway information signs (41%), persons at

visitor information centers (38%), and brochure racks (29%). Nearly half (47%) of Sanders County visitors used none of the sources listed, again a likely factor of the high rate of repeat visitation. Visitors also indicated what source was the most useful while traveling in Montana. Sixty-seven percent of respondents stated that highway information signs were most helpful, followed by persons in visitor information centers (24%), and service people (9%).

Statewide: Thirty-five percent of statewide visitors while *visiting* Montana obtained travel information from highway information signs. Other prominent information sources were service persons (30%) and brochure racks (28%). Thirty-four percent of statewide visitors did not use any of the information sources listed. Of the information sources used while visiting Montana, statewide visitors indicated that the most useful were persons in visitor information centers (29%), highway information signs (26%), and service persons (24%).

Table 5: Sources of Information Used While Visiting Montana

	Sanders County		Statewide	
	All Sources*	Most Useful Source	All Sources*	Most Useful Source
Highway information signs	41%	67%	35%	26%
Info center person	38%	24%	27%	29%
Brochure racks	29%	--	28%	18%
Service person (motel, restaurant, gas station, etc.)	11%	9%	30%	24%
Billboards	3%	--	12%	5%
None of these sources	47%	N/A	34%	N/A

Source: ITRR 2001 Nonresident Study

*Visitors could indicate more than one information source.

Bold percentages indicate top three responses.

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).

Sanders County: All overnight visitors to Sanders County indicated that vacation was one reason for traveling to Montana. Other frequently cited reasons included visiting family or friends (45%) and passing through the state (22%).

With respect to Sanders County overnight visitors' *primary* reason for visiting the state, over half (58%) were in Montana primarily for vacation. A significantly smaller portion (12%) were in Montana primarily to pass through the state, while 11% were mainly visiting family or friends.

Table 6: Reasons for Traveling to Montana

	Sanders County		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	100%	58%	72%	52%
Visit family or friends	45%	11%	28%	15%
Passing through	22%	12%	30%	21%
Business	5%		8%	7%
Shopping	--		6%	1%
Other	--		7%	4%

Source: ITRR 2001 Nonresident Study

* Visitors could indicate more than one reason.

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

Bold percentages indicate top three responses.

Statewide: Close to three-fourths (72%) of statewide visitors cited vacation as one reason for their trip to Montana. Also frequently mentioned were passing through (30%), and visiting family or friends (28%). Statewide travelers most frequently cited vacation as their *primary* reason for visiting Montana (52%). Passing through the state (21%) and visiting family or friends (15%) were also indicated as *primary* reasons.

Montana Attractions

Respondents who indicated that one purpose for their trip was vacation were then 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).

Sanders County: Many Sanders County vacationers were attracted by more than one of the state's many features. The top Montana attractions were open space (47%), visiting family and friends (43%), and camping (42%). As a primary attraction, 19 percent came primarily for fishing, 13% for special events, and 12% for Glacier national Park, while one quarter (25%) of respondents cited something other than the attractions listed in the questionnaire.

Statewide: Statewide visitors were also attracted to Montana for many reasons. The top attractions to Montana included the mountains (42%), Yellowstone National Park (39%), and open space (32%). The most frequently cited *primary* Montana attractions for statewide visitors were Yellowstone National Park (22%), Glacier National Park (19%), and visiting family and friends (12%).

Table 7: Attractions of Montana as a Vacation Destination

	Sanders County		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
Open space	47%	9%	32%	10%
Visiting family and friends	43%		19%	12%
Camping	42%		18%	2%
Fishing	41%	19%	14%	4%
Wildlife	37%		25%	1%
Lewis and Clark	30%		8%	2%
Mountains	28%		42%	11%
Rivers/lakes	28%		30%	2%
Yellowstone National Park	22%		39%	22%
Plains	17%		7%	1%
Glacier National Park	16%	12%	27%	19%
Hiking	11%		16%	1%
Native American culture	11%		8%	1%
Other Montana history	3%		10%	3%
Special events	3%	13%	6%	4%
Other	35%	25%	8%	4%

Source: ITRR 2001 Nonresident Study

* Visitors could indicate more than one attraction.

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

Bold percentages indicate top three responses.

With a few exceptions, differences in vacation attractions indicates how Sanders County visitors generally prefer enjoying various outdoor attractions by substantially larger margins than statewide vacationers. It is also interesting to note how many more visitors to Sanders County chose "other" attractions compared to statewide visitors.

Visitor Activities

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

Sanders County: Day hiking was the most popular activity among those visitors spending a night in Sanders County (45%). Other popular activities included wildlife watching and developed-area camping (40% each).

Statewide: For all visitors to the state, shopping topped the list of recreational activities (39%). Wildlife watching (36%) was popular as well, as were day hiking (33%) and picnicking (29%).

Table 8: Recreational Activity Participation

	Sanders County*	Statewide*
Day hiking	45%	33%
Wildlife watching	40%	36%
Camping (developed areas)	40%	23%
Special event/Festivals	39%	11%
Visiting museums	33%	20%
Visiting other historic sites	32%	26%
Visiting Lewis and Clark sites	30%	15%
Fishing	30%	16%
Visiting Native American sites	29%	14%
Shopping	28%	39%
Picnicking	26%	29%
Camping (primitive areas)	25%	9%
Nature studies	16%	12%
Gambling	14%	8%
Motor boating	9%	4%
Golfing	6%	7%
Off-road/ATV	3%	3%
River floating/rafting	--	7%
Canoeing/Kayaking	--	3%
Backpacking	--	4%
Mountain Biking	--	3%
Road Biking	--	3%
Sporting event	--	3%
Water skiing	--	1%
Sailing/Windsurfing	--	<1%

Source: ITRR 2001 Nonresident Study

* Visitors could indicate more than one activity.

Bold percentages indicate top three responses.

This recreational activity list indicates that visitors to Sanders County are involved in more outdoor activities that the overall statewide group. This may be partly due to their significantly longer length of stay (9.13 nights) in Sanders County compared to 4.2 nights for statewide visitors.

Economic Characteristics

Information about the number of visitors to an area and how much they spend during their visit there is useful for planning purposes. While travel group characteristics are based only on groups who spent a night in

Sanders 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).

Sanders County: Nonresident spending in Sanders County approached \$7.5 million in 2002, which is less than 1 percent of all nonresident spending in Montana. Nonresidents spent the equivalent of \$714 per county resident, which represents a little over one-third the state per-capita average.

Statewide: Nonresident visitors spent over \$1.8 billion in the state in 2002. This amounts to about \$1,994 per state resident.

Table 9: Expenditures by Nonresident Travelers in Sanders County and in Montana*

Distribution of Expenditures	Sanders County	Statewide
Licenses, entrance fees	28%	2%
Restaurant, bar	21%	20%
Auto rental and repair, transportation	13%	6%
Groceries, snacks	13%	8%
Gas and oil	12%	23%
Lodging, campgrounds, etc.	11%	15%
Retail sales	4%	21%
Guides/outfitters	--	3%
Miscellaneous services	--	1%
Total travel groups to sample area, 2001	200,000	4,084,000
Total expenditures in sample area, 2001 (2002\$)	\$7,461,000	\$1,803,500,000
Population (2001 census estimate)	10,443	904,433
Per capita expenditures in sample area, 2001 (2002\$)	\$714	\$1,994

Source: ITRR 2001 Nonresident Study; Montana Census and Economic Information Center³.

* Economic information updated 01/23/03; percentages may not add to 100 due to rounding.

Bold percentages indicate top three responses.

Differences in expenditure distribution shows that Sanders County visitors spend considerably more money on outdoor-related activities (licenses, entrance fees), while spending substantially less on retail goods. This suggests that Sanders County visitors often focus on less costly activities and services, which is likely due to their lower incomes than that of statewide visitors.

³ MT Department of Commerce, Census and Economic Information Center. Table CO-EST2001-07-27: Time series of Montana Population Estimates by County. Accessed at http://ceic.commerce.state.mt.us/demog/estimate/pop/county/cty_annualseries_00to01.

Section II: The Resident Attitude Study

Methodology

A mail-back questionnaire was administered to a sample of Sanders County residents in the fall of 2002. A similar survey (although lacking Sanders County-specific questioning) was distributed to a statewide sample in the fall of 2001 and those results are reported here as well. The distribution followed Dillman's Tailored Design Method (TDM)⁴ to ensure maximum response rates. The 2001 state survey achieved a response rate of 40 percent, while in 2002, the Sanders County resident attitude survey achieved a 37 percent response.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a randomly selected sample of 575 Sanders County households⁵, 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. To help ensure 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. This served 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 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. The survey instrument is included in Appendix A.

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 37 percent (162 households) of Sanders 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, 2001 Montana census estimates of age groups⁶, responses were weighted to more closely reflect the population of Sanders County. The results presented in this report reflect the adjusted dataset.

Table 10: Sample Sizes and Response Rates for 2001/2002 Resident Attitude Survey

	Sanders County	Statewide
Resident questionnaires mailed out	575	1,000
Undeliverable questionnaires	136	189
Usable resident questionnaires returned	162	328
Resident Attitude Study response rate	37%	40%

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

⁵ 575 surveys was chosen rather than the usual 500 to compensate for the 15 percent of the population which is in the process of changing residence at any one time and thus cannot be reached by mail.

⁶ MT Department of Commerce, Census and Economic Information Center. *Table CO-EST2001-07-27: Time series of Montana Population Estimates by County*. Accessed at http://ceic.commerce.state.mt.us/demog/estimate/pop/country/cty_annualseries_00to01.

Sanders 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 attitude questionnaire addressed topics that provide a picture of perceived current conditions and tourism's potential role in the community.

Respondent Characteristics

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

Sanders County: Fifty-two percent of respondents to Sanders County survey were male, compared to the actual ratio for Sanders County of 50 percent. The average age was 52 years, and respondents ranged in age from 27 to 83 years. Since the census median age in Sanders County is 44 years, the data were weighted by the age of the respondents.

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, with the age range spanning 18 to 94 years.

Table 11: Age and Gender Characteristics

	Sanders County	Statewide
Average age	52 years	47 years
Minimum age	27 years	18 years
Maximum age	83 years	94 years
Percent female	48%	47%
Percent male	52%	53%

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

Sanders County: Forty-two percent of Sanders County respondents were native Montanans. On average, they had lived in Sanders County for 24 years and in the state for 32 years. Twenty-one percent of respondents had lived in Sanders County longer than 40 years, while 31 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 their community for 24 years and in the state for 33 years. Twenty-one percent had lived in their community longer than 40 years, while 34 percent had lived there for 10 years or less.

Table 12: Residency Characteristics

	Sanders County	Statewide
Born in Montana	42%	53%
Mean years lived in community	24 years	24 years
Mean years lived in Montana	32 years	33 years

Table 13: Community Residency

	Sanders County	Statewide
10 years or less	31%	34%
11 to 20 years	24%	16%
21 to 30 years	12%	16%
31 to 40 years	12%	13%
41 to 50 years	10%	11%
51 to 60 years	5%	3%
61 years or more	6%	7%

Employment Status: Employment status, job type, and sector of employment can all influence support for tourism development. Therefore, it is likely that the more dependent a person is financially on the travel industry, the greater their support for tourism (Table 14).

Sanders County: The largest portion of respondents to the Sanders County resident attitude survey derived their income from the forest products industry (28%), followed by the service sector (21%). Other sizeable income sources included construction (19%) and education (18%). Two percent of respondents indicated that they were employed in the travel industry, however, employees in the service and retail sectors are likely to be part of this industry as well.

Statewide: The most common sources of household income for statewide respondents were the education and service sectors (18% each). Other sources of household income included health care (17%), wholesale/retail trade and professional (15% each). Approximately three percent of statewide households derived some portion of their household income directly from the travel industry. As may be the case for Sanders 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*	
	Sanders County	Statewide
Forestry or forest products	28%	5%
Services	21%	18%
Construction	19%	13%
Education	18%	18%
Agriculture	16%	13%
Professional	16%	15%
Health care	12%	17%
Wholesale/retail trade	12%	15%
Manufacturing	8%	--
Transportation, communication or utilities	7%	8%
Finance, Insurance or Real Estate (FIRE)	7%	6%
Restaurant or bar**	7%	6%
Clerical	3%	7%
Armed services	3%	4%
Other	7%	6%
Travel industry	2%	3%

* Households can earn 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.

Bold percentages indicate top three responses.

As anticipated, a considerably higher percentage of Sanders County residents derive income from the forest products sector than statewide respondents since they are more reliant upon natural resources of the area. Furthermore, Sanders County residents show higher sector percentages overall suggesting that they more often derive income from multiple sectors than do statewide residents.

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 15 and 16).

Sanders County: More than a third (38%) of Sanders County respondents believe that the travel industry should have a role equal to other industries in the local economy, while 13 percent feel it should have a dominant role. However, nearly half (49%) of the respondents feel that tourism should have either a minor role or no role at all in the local economy. Tourism/recreation ranked seventh behind wood products, agriculture/agribusiness, services, technology, retail/wholesale trade, and manufacturing in terms of desirability as an economic development opportunity 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. Twenty percent believe the industry should have a minor role while 14 percent favor a dominant role. When ranking tourism along with other industry segments according to economic desirability for the community, it placed fifth, behind services, technology, agriculture/agribusiness, and wholesale/retail trade.

Table 15: Role of Tourism in the Local Economy

	Sanders County	Statewide
No role	9%	4%
A minor role	40%	20%
A role equal to other industries	38%	62%
A dominant role	13%	14%

Table 16: Most Desired Economic Development

	Sanders County		Statewide	
	Rank	Mean*	Rank	Mean*
Wood products	1	3.34	7	5.68
Agriculture/agribusiness	2	3.58	3	3.60
Services	3	4.02	1	3.39
Technology	4	4.23	2	3.42
Retail/wholesale trade	5	4.28	4	3.71
Manufacturing	6	4.32	6	4.51
Tourism/recreation	7	5.09	5	4.22
Mining	8	6.24	8	7.09

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

Both of these tables together indicate that Sanders County residents may not see tourism as compatible with their county, especially when compared to the statewide sample. General low support for Sanders County tourism is reflected in tourism's relative low importance in the local economy as well as its lesser ranking against other industries, other than mining.

Dependence on Tourism

Respondents were asked about the degree to which their place of work relied on tourists for its business. Again, the responses summarized below may be yet another indicator of the identity problem faced by the travel industry in that people may not necessarily realize that their employment is supported by tourist spending (Table 17).

Sanders County: Eight percent of Sanders County respondents indicated that their place of employment provides a majority of their products or services to tourists or tourist businesses. Fifty-three percent work in places that provide none of their products or services to tourists or tourist businesses.

Statewide: Only seven percent of statewide respondents work in places that provide a majority of their products or services to tourists or tourist businesses, whereas the largest portion of respondents (48%) is employed in places that provide none of their products or services to tourists or tourist businesses.

Table 17: Employment's Dependency on Tourists for Business

	Sanders County	Statewide
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	8%	7%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	39%	45%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	53%	48%

Interactions with Tourists

The extent of interaction between tourists and residents can affect the attitudes and opinions residents hold toward tourism in general. In turn, an individual's behavior is usually 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 how they enjoy those interactions (Tables 18 and 19).

Sanders County: When asked about the frequency of their interactions with tourists, 10 percent indicated that they have frequent contact. Thirty percent reported that they have infrequent contact with tourists visiting Sanders County. Looking at attitudes towards tourists, nearly half (49%) of Sanders County residents enjoy meeting and interacting with tourists when the occasion arises. Fourteen percent of respondents reported not enjoying 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 were indifferent to meeting and interacting with tourists, while four percent did not enjoy these interactions.

Table 18: Frequency of Contact with Tourists Visiting Community

Degree of Frequency	Sanders County	Statewide
Frequent contact	10%	16%
Somewhat frequent contact	24%	27%
Somewhat infrequent contact	35%	26%
Infrequent contact	30%	31%

Table 19: Attitude Toward Tourists Visiting Community

Attitude	Sanders County	Statewide
Enjoy meeting and interacting with tourists	49%	68%
Indifferent about meeting and interacting with tourists	38%	28%
Do not enjoy meeting and interacting with tourists	14%	4%

Compared to statewide residents, Sanders County respondents had less frequent contact with visiting tourists. This likely influenced their indifferent or slightly negative attitudes towards interacting with tourists in their communities.

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 20).

Sanders County: The Index of Community Attachment (i.e., the mean of the scores for the three community attachment statements) indicates that Sanders County respondents are indeed attached to their community. An average rating of 0.61 suggests these residents like where they live. Most of their feelings about their community were positive; however, their outlook on the future was negative at -0.16.

Statewide: For respondents to the statewide survey, the Community Attachment Index produced a score of 0.60, which is essentially the same as Sanders County. Therefore, it may be safe to say that Montana residents, in general, are attached to their communities. However, as was the case with Sanders County respondents, statewide respondents also rated the future of their community lower than the other items in the index.

Table 20: Community Attachment Statements

	Sanders County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I'd rather live in my community than anywhere else.	3%	17%	41%	40%	0.98	4%	18%	51%	27%	0.78
If I had to move away from my community, I would be very sorry to leave.	2%	16%	45%	38%	1.02	3%	22%	47%	29%	0.76
I think the future of my community looks bright.	11%	47%	32%	11%	-0.16	8%	31%	48%	12%	0.26
Index of Community Attachment**	0.61					0.60				

* 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.

Even though the Index of Community Attachment scores are essentially the same, the differences in the individual mean scores are noteworthy. Higher Sanders County mean scores for the first two statements indicate that area residents seem more attached to their communities than statewide respondents. However, the Sanders County negative score regarding the future of their community suggests they have a less optimistic, if not pessimistic, outlook than statewide residents.

Population Change: To assess residents' perceptions and opinions regarding population change in their community, respondents were asked to indicate if they perceived the population of their community to be changing and, if so, how that change is occurring and at what rate (Tables 21 and 22).

Sanders County: Ten percent of Sanders County respondents feel that the town's population is not changing at all, while 82 percent feel it is increasing and eight percent feel it is decreasing (Table 21). Of those who feel the town's population is increasing (Table 22), 52 percent feel it is increasing at the right rate while 44 percent feel it is increasing too fast. According to the U.S. Census, the population of Sanders County increased by 6 percent from 1991 to 2001⁷.

Statewide: On the statewide level, 13 percent of respondents feel that the population of their community is unchanging (Table 21). Sixty-four percent feel the population is increasing, while 23 percent feel it is decreasing. Of those who indicated that the population of their community is increasing (Table 22), about half (48%) feel this is happening at the right rate. However, a full 50 percent feel this increase is occurring too fast. How residents perceive population changes in the state is naturally a function of where in the state they live. Consequently, the statewide perception is not necessarily a good measure of comparison for the city-specific perception obtained from Sanders County. However, statewide population increased by 12 percent between 1991 and 2001⁸.

Table 21: Perceptions of Population Change

	Sanders County	Statewide
Population is not changing	10%	13%
Population is increasing	82%	64%
Population is decreasing	8%	23%

Table 22: Perceived Rates of Population Change

	Sanders 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	44%	50%
Population is increasing at the right rate	52%	48%
Population is increasing too slowly	5%	2%

⁷ MT Department of Commerce, Census and Economic Information Center. Time Series of Montana Intercensal Population Estimates by County: April 1, 1990 to April 1, 2000, accessed at http://ceic.commerce.state.mt.us/demog/estimate/pop/county/revised_cty_est_9199.pdf, and Table CO-EST2001-02-27 Montana Compositions of Population Change: April 1, 2000 to July 1, 2001, accessed at http://ceic.commerce.state.mt.us/demog/estimate/pop/county/cty_components_00to01.pdf.

⁸ 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 aspects, 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 planners and decision-makers. It is also necessary to understand how residents’ perceptions of increased tourism could change their quality of life. Such perceptions define residents’ attitudes toward this type of community development.

To address this, respondents were asked to rate the current condition of a number of factors that comprise their current level of quality of life using a scale ranging from -2 (very poor condition) to +2 (very good condition). They were also asked to rate how they believed increased tourism would influence these factors. The influence of tourism was rated using a scale of -1 (negative influence), 0 (both positive and negative influence), and +1 (positive influence) (Tables 23 and 24).

Sanders County: Sanders County respondents indicated that they are relatively satisfied with most quality of life variables in their community (Table 23). The items receiving the most favorable ratings were traffic congestion, overall community livability, and safety from crime. Several items were rated as being in less than good condition, including job opportunities, museums and cultural centers, and cost of living.

Looking at tourism’s potential influence on quality of life, museums and cultural centers received the highest positive mean score (Table 24), followed by parks and recreation areas, job opportunities, and educational system. The most negative potential influences include traffic congestion, safety from crime, and conditions of roads and highways.

Statewide: Overall, statewide respondents were more satisfied with the current condition of quality of life than Sanders County respondents (Table 23). At this level overall livability received the most favorable score, while job opportunities received the least favorable one.

Statewide respondents expect tourism development to have a positive impact on museums and cultural centers, as well as on job opportunities and parks and recreation areas (Table 24). Negative influence is expected for the level of traffic congestion. Statewide respondents also indicated that they expect increased tourism to have both positive and negative impacts on most quality of life variables, including emergency services, community livability, safety from crime, cleanliness and appearance, local infrastructure, cost of living, and road and highway conditions.

Table 23: Quality of Life—Current Condition (Scale from -2 to +2)

	Sanders County Mean*	Statewide Mean*
Traffic congestion	1.15	0.44
Overall community livability	1.11	1.27
Safety from crime	0.87	1.02
Infrastructure	0.62	0.56
Parks and recreation areas	0.56	1.05
Overall cleanliness and appearance	0.55	0.82
Emergency services	0.50	1.19
Education system	0.46	0.73
Conditions of roads and highways	0.35	0.31
Cost of living	-0.17	0.00
Museums and cultural centers	-0.54	0.84
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 is the perceived condition of the variable.

Bold scores represent top three responses.

Table 24: Quality of Life—Tourism’s Influence (Scale from –1 to +1)

	Sanders County				Statewide			
	Negative Influence*	Positive & Negative Influence*	Positive Influence*	Mean Score**	Negative Influence*	Positive & Negative Influence*	Positive Influence*	Mean Score**
Museums and cultural centers	7%	28%	65%	0.58	1%	16%	83%	0.82
Job opportunities	20%	35%	45%	0.25	6%	28%	66%	0.60
Emergency services	22%	58%	20%	-0.01	16%	56%	28%	0.12
Education system	23%	42%	35%	0.12	9%	50%	41%	0.31
Parks and recreation areas	23%	26%	51%	0.29	13%	40%	47%	0.33
Overall community livability	35%	48%	18%	-0.17	10%	63%	27%	0.17
Infrastructure	37%	46%	18%	-0.19	30%	43%	27%	-0.02
Overall cleanliness and appearance	37%	42%	21%	-0.16	24%	48%	28%	0.03
Cost of living	42%	35%	24%	-0.18	28%	49%	23%	-0.06
Conditions of roads and highways	47%	33%	20%	-0.26	38%	34%	28%	-0.09
Safety from crime	55%	37%	9%	-0.46	36%	49%	15%	-0.20
Traffic congestion	67%	29%	4%	-0.63	68%	24%	8%	-0.60

* Percentages may not add to 100 due to rounding.

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

Bold scores represent top three responses.

Considering both the current condition and tourism’s influence on quality of life, several interesting differences emerge. For Sanders County residents, the highest scored current condition variable (traffic condition) received the lowest mean score when considering tourism’s potential influence upon it. Similarly, but not as dramatically, the most highly scored current condition (overall community livability) for statewide residents became substantially reduced when viewed in terms of the potential influence from tourism. In contrast, current job opportunities scored the lowest for both Sanders County and statewide residents, yet they both scored near the top when influenced by tourism. In sum, Sanders County and statewide residents recognize that there is a tension between their current quality of life and that tourism can or will influence those qualities. Some of their current quality of life aspects could be considerably negatively influenced (e.g., traffic congestion), yet other aspects could be greatly enhanced (e.g., job opportunities).

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 25).

Sanders County: A majority (61%) of Sanders County respondents 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. Fifty-three percent of respondents also feel that any negative impacts of tourism are outweighed by its benefits. However, 59 percent do not agree that their community is a good place for tourism investment, while 47 percent indicated that they do not believe increased tourism will help their community grow in the right direction. A slight majority (57%) of Sanders County respondents feel that tourism promotion by the state benefits their community economically, but less than half (40%) believe that jobs in the travel industry offer opportunities for advancement. Even fewer (37%) feel that overall quality of life for Montana residents will improve with increased tourism. The majority of respondents (79%) do not see a connection between increased tourism in the community and a more secure income for themselves, just as 83 percent do not think that increased tourism will lead to any financial benefit on their part.

Based on these responses, the Sanders County Index of Tourism Support (i.e., the mean of the average scores for each statement) is -0.34 . While respondents do show some support for tourism promotion and its potential benefits, they do express a few reservations about tourism on the whole. Negative responses to the statements regarding tourism and personal financial benefits, secure of income, and quality of life contributed to the overall negative score for tourism development support.

Statewide: Overall, statewide respondents are more supportive of tourism and the travel industry than Sanders County respondents. The average score for each statement is consistently higher for statewide respondents than it was for Sanders County respondents. 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 think 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 improve their personal economic status. 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 close-to-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 25: Index of Tourism Support

	Sanders County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
Tourism promotion by the state of Montana benefits my community economically.	14%	29%	50%	7%	0.07	5%	17%	61%	17%	0.67
My community is a good place to invest in tourism development.	18%	41%	32%	9%	-0.28	9%	26%	51%	14%	0.37
Increased tourism would help my community grow in the right direction.	20%	27%	45%	9%	-0.04 ^a	8%	27%	53%	12%	0.35
I believe jobs in the tourism industry offer opportunity for advancement.	23%	38%	33%	7%	-0.38	10%	41%	43%	6%	0.00
The overall benefits of tourism outweigh the negative impacts.	23%	25%	44%	9%	-0.07 ^a	4%	25%	62%	9%	0.47
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	24%	14%	48%	13%	0.11	7%	12%	63%	18%	0.72
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	30%	33%	33%	4%	-0.52	10%	37%	49%	4%	0.00 ^a
If tourism increases in my community, my income will increase or be more secure.	38%	41%	20%	2%	-0.92	24%	38%	30%	8%	-0.39
I will benefit financially if tourism increases in my community.	44%	39%	16%	1%	-1.07	25%	45%	25%	5%	-0.60
Index of Tourism Support**	-0.34					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 mean scores for each statement.

^aThese mean scores may not appear to reflect the amount of general agreement or disagreement because the actual percentage distribution determines the size and direction of the mean score.

Overall, Sanders County respondents show considerably less support for tourism than statewide residents. For each statement, the Sanders County response was in more disagreement than statewide suggesting that they see less of a connection with aspects of tourism development. These more negative perceptions of tourism could present challenges for local efforts in developing tourism-related activities.

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 26). In this scale, however, agreement means there is a higher concern about tourism.

Sanders County: Most (86%) of Sanders County respondents believe that most tourism jobs pay low wages. Fifty-one percent feel that tourists do not pay their fair share for the services they use, while 61 percent agree that vacationing in Montana influences too many people to move to the state. Half (50%) of the respondents

do not feel the state is becoming too crowded because of tourists, but 33 percent feel that out-of-state visitors limit their access to recreation opportunities.

Again, the people of Sanders County take issue with the wages reportedly paid by the tourism and recreation industry in the area. In addition, as was confirmed previously in this report (Tables 21 and 22), they feel that there are too many people moving to their area and blame this in part on all the visitors who come to the area each year. The Index of Tourism Concern equals 0.30 for Sanders County, which is somewhat higher than for the state as a whole, indicating a concern about the negative aspects of tourism.

Statewide: In the area of tourism concern, statewide respondents show a little less concern than do Sanders County respondents. The statements scored lower for statewide respondents across the board. 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, a slim 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 lower scores in all categories, the Index of Tourism Concern will be lower as well. However, at 0.15, it is still positive, indicating that there is a low level of concern regarding tourism development in the state as a whole.

Table 26: Index of Tourism Concern

	Sanders 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.	3%	11%	53%	33%	1.02	2%	18%	58%	22%	0.79
Vacationing in Montana influences too many people to move to the state.	4%	34%	35%	26%	0.46	8%	41%	32%	19%	0.12
In recent years, Montana is becoming overcrowded because of more tourists.	6%	44%	28%	22%	0.14 ^a	11%	46%	30%	13%	-0.12
Tourists do not pay their fair share for the services they use.	11%	39%	24%	27%	0.17 ^a	4%	41%	38%	17%	0.24
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	12%	55%	16%	17%	-0.29	11%	53%	23%	13%	-0.27
Index of Tourism Concern**	0.30					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.

^aThese mean scores may not appear to reflect the amount of general agreement or disagreement because the actual percentage distribution determines the size and direction of the mean score.

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 27).

Sanders County: Seventy-one percent of respondents agree that there is adequate undeveloped open space in the community while 69 percent are concerned about the potential disappearance of what does exist. Fifty-four percent would support land use regulations to manage growth in the community.

Statewide: Among statewide respondents, 59 percent agree that there is adequate undeveloped open space in their community, while sixty percent are 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.

Table 27: Land Use Issues

	Sanders County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I am concerned with the potential disappearance of open space in my community.	5%	26%	31%	38%	0.71	7%	33%	37%	23%	0.37
There is adequate undeveloped open space in my community.	10%	19%	50%	21%	0.53	8%	33%	47%	12%	0.21
I would support land use regulations to help manage types of future growth in my community.	26%	21%	35%	19%	0.00	7%	15%	57%	21%	0.68

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

Tourism-Related Decision-Making

Residents have strong feelings about participating in decisions that will ultimately affect their community and their own lives. They were asked to respond to two statements related to who should be making decisions about tourism in their community. Again, responses ranged from -2 (strongly disagree) to +2 (strongly agree), with a positive score indicating agreement while a negative score indicates disagreement (Table 28).

Sanders County: Sanders County respondents feel strongly that residents should be involved in decision-making regarding local tourism development. Ninety-four percent of respondents either agreed or agreed strongly that it is important that residents be involved in decisions about tourism, while 69 percent disagreed that decisions regarding tourism volume are best left to the private sector, emphasizing the desire for public involvement.

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%), suggesting that the public should be involved at all levels.

Table 28: Tourism-related Decision-making

	Sanders County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
It is important that residents of my community be involved in decisions about tourism.	2%	4%	52%	42%	1.29	2%	6%	51%	41%	1.24
Decisions about how much tourism there should be in my community are best left to the private sector.	31%	38%	20%	12%	-0.57	26%	41%	25%	8%	-0.50

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

Questions Specific to Sanders County

Sanders County CTAP committee was given the opportunity to include questions specific to the region on the Resident Attitude questionnaire. The responses to these questions and other community-specific items are reported below. With one exception, the following are all responses to open-ended questions.

Sanders County Characteristics

The following three items deal with characteristics, both positive and negative, of Sanders County. They were asked as open-ended questions to solicit residents' true feelings, and the answers reflect their own wording. The answers are used in the visioning part of the CTAP, where they are considered by residents when making development plans for the future (Tables 29-31).

Valued characteristics of Sanders County: Respondents were asked what characteristics of Sanders County they value and would like to see continued into the future (Table 29). At the top of the list were the scenic open spaces and wilderness (16%), but residents also appreciate the area's rural, family-centered lifestyle (13%), and the solitude and sense of community (11% each).

Table 29: Valued Characteristics of Sanders County

Characteristics*	Number of Respondents*	Percent of Responses**
Open space/wilderness/scenery	33	16%
Rural lifestyle/family values	27	13%
Solitude/isolation/privacy	23	11%
Sense of community/friendly people	22	11%
Recreation opportunities (hunting/fishing)	16	8%
Slow pace/quiet	13	6%
Small town atmosphere/small communities	11	6%
Clean air and water	8	4%
Natural resource economy	6	3%
Low crime	5	2%
Low traffic	4	2%
Slow growth/no growth	4	2%
Special events (festivals, fairs)	4	2%
Low cost of living	2	1%
No subdivisions/lack of development	2	1%
Freedom	2	<1%
Local government decisions	2	<1%
No traffic lights	2	<1%
Respect for private property	2	<1%
Road maintenance	2	<1%
Acceptance of others/openness to others	1	<1%
Assisted/retirement living facilities	1	<1%
Bison Range	1	<1%
Development	1	<1%
Lack of government bureaucracies	1	<1%
Large amount of timber	1	<1%
Overall livability	1	<1%
Railway transportation	1	<1%
River access	1	<1%
Small businesses	1	<1%
Unincorporated status	1	<1%
Western style of buildings	1	<1%
Wildlife	1	<1%
Winter temperatures	1	<1%

* Respondents could offer more than one suggestion.

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

Disliked characteristics of Sanders County: Planning for desired conditions is one thing, however, one must also be careful to avoid undesirable conditions. To that end, respondents were asked to identify what characteristics of Sanders County they dislike and would not like to see continued into the future (Table 30). The largest concern was over haphazard building developments (12%), yet 11 percent of respondents disliked new residents, especially the older, retired newcomers.

Table 30: Disliked Characteristics of Sanders County

Characteristics*	Number of Respondents*	Percent of Responses**
Haphazard development/subdivisions	16	12%
New residents (esp. older, retired)	15	11%
Crime, drugs	7	5%
Lack of employment/low wages	7	5%
Catering to tourism/tourism industry	5	4%
Lack of timber stewardship (e.g., clear-cutting)	5	4%
Loss of resource-based economy	5	4%
Run-down appearance	5	4%
Increasing taxes	5	3%
Logging (natural resource extraction)	4	3%
Newcomers voting down things they see as unimportant	4	3%
Planning by outsiders	4	3%
Commercialization/chain stores	3	2%
Local government	3	2%
More laws	3	2%
Pollution	3	2%
Poor health care	3	2%
Rapid growth/crowding	3	2%
Welfare recipients, low income families	3	2%
Closed-mindedness/short-sighted views	2	2%
Closing of public schools	2	2%
No disliked characteristics	2	2%
Attitude of “no hope” in residents	2	1%
Businesses closing	2	1%
Environmentalists actions	2	1%
Fear of business development	2	1%
More gambling, bars	2	1%
Paving Thompson River Highway	2	1%
Poor road conditions	2	1%
Remoteness of sheriff, fire dept.	2	1%
Water usage	2	1%
Anti-government attitudes	1	<1%
Destruction of natural beauty	1	<1%
Glacial Lake Missoula	1	<1%
Hate groups living in county	1	<1%
Higher cost of living, property values	1	<1%
Homes in the hills	1	<1%
Hunting	1	<1%
Lack of education	1	<1%
Lack of respect for rights of others	1	<1%
Lack of Services	1	<1%
Large portion of county in reservation	1	<1%
No benefit from county	1	<1%
Not keeping up Montana history (e.g., buildings)	1	<1%
Promotion as “low rent” area	1	<1%
Speeding/traffic	1	<1%
Turning lands into refuges and preserves	1	<1%

* Respondents could offer more than one suggestion. ** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted dataset.

Missing Characteristics of Sanders County: Another facet of planning, in addition to learning what should be kept, is finding out what positive aspects can be developed within the community (Table 31). In response to the question of what is missing from Sanders County that residents would like to see in the future, 28 percent identified industry and manufacturing as missing. One quarter (25%) of the respondents believed that good-paying jobs were missing from Sanders County as well.

Table 31: Characteristics Missing from Sanders County

Characteristics*	Number of Responses*	Percent of Responses**
Industry, manufacturing	39	28%
Jobs with good wages	35	25%
Nothing is missing	9	7%
Activities/programs for children/youth	7	5%
Medical facility, health care	5	4%
Timber industry, management	5	4%
Culture, entertainment	3	2%
Recycling facility	3	2%
Street/road maintenance	3	2%
More recreation areas	2	2%
Peace and quiet	2	1%
Radio station	2	1%
Single women	2	1%
Tourism/visitor activity	2	1%
Young families	2	1%
Drug control	1	1%
Police protection	1	1%
Population growth	1	1%
Rest stops	1	1%
Tax reform	1	1%
Airport expansion, aviation fuel availability	1	<1%
Assistance for needy	1	<1%
Better buildings, equipment for students	1	<1%
Convention center	1	<1%
Education opportunities	1	<1%
Equality for all citizens	1	<1%
History	1	<1%
Land use planning	1	<1%
Longer hunting/fishing season	1	<1%
Low-income housing	1	<1%
No-restrictions development (e.g., logging, mining)	1	<1%
Old small town atmosphere	1	<1%
Private ownership of lands	1	<1%
Progress	1	<1%
Restoration/preservation of buildings	1	<1%
River access	1	<1%
Swimming pool	1	<1%
Values (e.g., respect, honor, trust)	1	<1%
Wildlife, protection of 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.

Considering valued, disliked, and missing characteristics of Sanders County, all of the top responses center around typical aspects of western, rural communities. In general, Sanders County residents value their small, rural culture, shy away from questionable developments and newcomers, while hoping for the local job base to expand. Any potential plans for tourism development will likely face greater success when they are sensitive to the local characteristics that residents value.

Where Sanders County Residents Take Their Visitors

When looking to tourism development in an area, it can be a good idea to work with attractions that already exist there in order to reduce both impact and cost. To that end, one survey question asked respondents where they take people who come to visit (Table 32). Respondents were encouraged to include attractions and specific locations. The natural scenery of the area is by far the most popular attraction (17%), followed by the Ross Creek Cedars (12%), and the Bison Range (9%).

Table 32: Attractions Visited by Residents and Visitors

Attractions	Number of Respondents*	Percent of Responses**
Scenery	40	17%
Ross Creek Cedars	26	12%
Bison Range	20	9%
Local fair	16	7%
Wildlife	14	6%
No attractions	10	4%
Clark Fork River	9	4%
Dams/lakes/rivers	9	4%
Local stores/bars/restaurants	9	4%
Thompson River/Dam	8	4%
Noxon Rapids/Reservoir	8	3%
Power Park	7	3%
Quinn's hot springs	6	3%
Fire lookouts	5	2%
Hot Springs (pools and town)	5	2%
Huckleberry Festival	5	2%
Thompson Falls	5	2%
Mountain trails	4	2%
Antique stores	3	1%
Vermillion Falls	3	1%
Cascade Nature Trail	2	<1%
Plains Days	2	<1%
Cabinet Mountains	1	<1%
Elk Lake	1	<1%
Glacial Lake Missoula	1	<1%
Golf courses	1	<1%
Graves Creek Falls	1	<1%
Melon Days	1	<1%
Old Jail museum	1	<1%
Rock Creek	1	<1%
Rodeo	1	<1%
Thompson Pass	1	<1%

* Respondents could offer more than one suggestion. ** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted dataset.

Recreation Activities by Residents and Visitors: Residents of Sanders County were also asked about the kinds of recreation activities they engage in when family and friends visit the area (Table 33). Most of the activities that respondents offered centered around outdoor recreation with fishing (22%) being the most popular activity, followed by hiking (17%), and various boating activities (12%).

Table 33: Recreation Activities by Residents and Visitors

Recreation Activities	Number of Respondents*	Percent of Responses**
Fishing	59	22%
Hiking	46	17%
Canoeing, boating, floating	31	12%
Hunting	27	10%
Sightseeing, viewing animals	24	9%
Camping	18	7%
Horseback riding	14	5%
Swimming	9	3%
Picnicking	7	3%
Golfing	6	2%
No recreation activity	6	2%
Snowmobiling	6	2%
Skiing	4	2%
Family activities	3	1%
4-Wheeling	3	<1%
Huckleberry picking	2	<1%
Archery shooting	1	<1%
Attending community events	1	<1%
Barbecuing	1	<1%
Dining	1	<1%
Sledding	1	<1%
Snow sports	1	<1%
Veterans of Foreign Wars activities	1	<1%
Walking	1	<1%

* Respondents could offer more than one suggestion.

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

Tourism Development Issues in Sanders County

Sanders County Infrastructure Improvement for Handling More Visitors: Increased tourism in an area can put serious demands on the local infrastructure. Sanders County residents were asked about the necessary infrastructure improvements for handling more visitors to the area (Table 34). A little more than half (51%) of the respondents recognized the need to improve public restroom facilities, while 39 percent suggested highway improvements. About a third (35%) indicated that recreation areas need access roads as well as a tourism information center.

Table 34: Improvements for Handling More Visitors to Sanders County

	Percent Agree*
Public restrooms	51%
Highway improvements	39%
Recreation area access roads	35%
Tourist information center	35%
More restaurants	34%
More hotels/motels	32%
Emergency services	21%
Health services	17%
No of these improvements needed	14%

* Respondents could offer more than one suggestion.

Promoting Glacial Lake Missoula in Sanders County: Local tourism development can often times occur through promotion of historical events in an area. It has been argued that promoting Glacial Lake Missoula in Sanders County has the potential for developing area tourism. However, when respondents were asked about actively promoting Glacial Lake Missoula, less than one-quarter (24%) responded favorably (Table 35). Those who believed that promoting Glacial Lake Missoula should be done in Sanders County offered 13 different ways to do so.

Table 35: Promoting Glacial Lake Missoula

Should Sanders County promote Glacial Lake Missoula?	Yes - 24%	No - 76%
If yes, how should promotion be done?	Number of Respondents*	Percent of Responses**
Interpretive signs	12	32%
Visitor/information center	7	19%
Interpretive tours	4	11%
Media	3	9%
Internet	3	7%
Brochures	2	6%
Maps	1	4%
Travel magazines	1	4%
AM radio	1	2%
Boat tours	1	2%
Include local people	1	2%
Museum	1	2%
State/federal project	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 dataset.

Perceptions of Sanders County's Image: Respondents were asked about the image they had of Sanders County as a whole, considering the county's past, present and future (Table 36). The image receiving the largest number of responses was that Sanders County is a nice place to live and work (9%). Eight percent indicated that the county's image was a place rich in beauty, followed by Sanders County being a wonderful place to raise a family, a quiet and peaceful place to live, as well as a depressed economy (6% each).

Table 36: Respondent Images of Sanders County

	Number of Respondents*	Percent of Responses**
Nice place to live and work	9	9%
Rich in beauty	8	8%
Wonderful place to raise a family	6	6%
Quiet place to live, peaceful	6	6%
Depressed economy	6	6%
Resistant to change	4	4%
Will slowly deteriorate	4	4%
As home	3	3%
County is growing	3	3%
Growing smaller in population	3	3%
Growing smaller in industry	3	3%
Low crime	3	3%
Rural	3	3%
Satisfactory	3	3%
The last best place	3	3%
No economy	2	2%
Place to go retire	2	2%
Potential for development	2	2%
Small, close-knit community	2	2%
Uncrowded	2	2%
Widespread, big	2	2%
Wonderful county with much to enjoy	2	2%
40 miles from nowhere	2	2%
Agriculture and timber communities	1	1%
Ecologically pure and clean	1	1%
Great for retirees, bad for younger generation	1	1%
Need money to live here	1	1%
Outdoor scenic wonderland	1	1%
Poor	1	1%
Slow-paced	1	1%
An escape haven	1	<1%
Anti-business	1	<1%
Backwards	1	<1%
Comfortable	1	<1%
Crime increasing	1	<1%
Hardworking people	1	<1%
Image not good	1	<1%
Increased retail	1	<1%
Interesting past, bland present, nonexistent future	1	<1%
Lifestyle and individualism	1	<1%
Many drawbacks	1	<1%
Offers little employment/income	1	<1%
Rugged	1	<1%
Too much welfare	1	<1%
Values and work ethic of "real" Montana	1	<1%

* Respondents could offer more than one suggestion.

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

Respondents Presentation of Sanders County History to Residents and Visitors: In this section of Sanders County-specific questions, respondents were asked about how they would present the history of the county to both residents and visitors (Table 37). Twenty two percent suggested that county history should be presented through museums, while 11 percent preferred literature and another 11 percent favored signs.

Table 37: Respondent Preferences for Presenting Sanders County History

	Number of Respondents*	Percent of Responses**
Through museums	16	22%
Through literature	8	11%
Signs	8	11%
Information/visitor center	6	9%
Focus on Native Americans	5	7%
Books	5	6%
Through local schools	3	5%
Brochures/pamphlets	3	4%
Interpretive hikes/trails	3	4%
Through website	2	3%
Activities	1	2%
Information/maps at local businesses	1	2%
Speakers	1	2%
Booth at County Fair	1	1%
Develop theme for county	1	1%
Films	1	1%
Focus on Lewis and Clark	1	1%
Focus on fire of 1910	1	1%
Geological history of Clark Fork River	1	1%
Information at old buildings	1	1%
Lecture series	1	1%
Renovating building fronts	1	1%
Rodeo	1	1%
Tours	1	1%
Weekly newspaper articles	1	1%

* Respondents could offer more than one suggestion.

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

There are several tourism development issues in Sander County. Residents believe that if more visitors come to the area then the local infrastructure will require improvements, suggesting that many aspects of the current infrastructure can only handle present demands from locals and visitors. Secondly, tourism promotion through Glacial Lake Missoula was largely dismissed indicating that residents do not feel the historical event has much economic potential. Finally, residents in general have positive images of Sanders County and they suggest presenting the county and its history through typical mediums (museums, literature, signage, etc.).

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 38 and 39).

Sanders County: One-third (33%) of Sanders County respondents identified economic and financial benefits as the advantage of tourism (Table 38). Twenty-five percent associated increased job opportunities with tourism while 19 percent believed that increased tourism offers no advantage. In terms of disadvantages (Table 39), 19 percent identified more people and crowding as the chief problem caused by tourism growth, followed by traffic and accidents (15%), and pollution and vandalism (8%).

Table 38: Advantages Associated with Increased Tourism in Sanders Co.

	Number of Responses*	Percent of Responses**
Economic/financial benefit	47	33%
Job opportunities	36	25%
No advantage	27	19%
New and improved businesses	12	8%
Healthier infrastructure	3	2%
More activities	3	2%
Support for environmental preservation	3	2%
Diversified economy	2	1%
Improved area appearance	2	1%
More competitive prices	2	1%
Improved quality of life	1	1%
New industry	1	1%
Education/enlightenment	1	<1%
Growth/improvements in area	1	<1%
Increased property values	1	<1%
More positive outlook on world	1	<1%
Tourists patronizing local businesses	1	<1%

* Respondents could offer more than one suggestion.

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

Table 39: Disadvantages Associated with Increased Tourism in Sanders Co.

	Number of Responses*	Percent of Responses**
More people/crowding	32	19%
More traffic/accidents	25	15%
Pollution/vandalism	14	8%
Decreased quality of life	12	7%
Tourists moving here	12	7%
Low-wage jobs	11	6%
Crime, drugs	10	6%
No disadvantages	8	5%
Overuse of natural areas	7	4%
Stress of infrastructure	6	4%
Higher taxes	6	3%
Increased restrictions	5	3%
Deteriorating roads	4	2%
Commercialization, chain stores	3	2%
Few people benefit	2	1%
Higher prices	2	1%
Recreational fees	2	1%
Reliance on tourist money	2	1%
Tourists do not pay fair share	2	1%
Need more parking, services	2	1%
Environmentalists keep people from enjoying outdoors	1	<1%
Hostility towards outsiders	1	<1%
Loss of open space	1	<1%
More government involvement	1	<1%
No personal gains	1	<1%
Too many changes	1	<1%
Tourists impede way of life	1	<1%
Would mirror horrors of CA, CO	1	<1%

* Respondents could offer more than one suggestion.

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

Overall, Sanders County respondents perceived more disadvantages than advantages with increased tourism in their area. The main advantages focus on economic concerns, while the top disadvantages deal with problems associated with increased crowding and more demands on local resources. These findings suggest that area residents recognize some of the benefits of local tourism, however, the perceived disadvantages cause more concern for them and seem to outweigh the benefits.

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. Unfortunately, there is little consensus among the comments (Table 40). For a list of comments cited verbatim, please see appendix B.

Table 40: General Comments by Sanders County Respondents

	Count
Outsiders threaten/degrade way of life	4
Attract/promote “clean” industries	2
Combine advertising funds from bed tax, grants, etc.	2
Need more good wage jobs	2
No additional tourism	2
Outsiders ruin camping, fishing, hunting	2
Promote all tourist-related businesses in one area together	2
Attract retiring Baby Boomers to beauty of Montana	1
Be helpful to tourists without making a lot of rules	1
Communities must have industry to grow and prosper	1
Deregulation of power hurts area	1
Drop tourist tax	1
High local prices drive locals and visitors to Missoula and Kalispell	1
How can county tourism make it if Glacier and Yellowstone can't?	1
Looking forward to development, growth and change	1
Need bus service for attractions	1
No change coming to hot springs	1
Thompson Falls needs more RV parking	1
Trust people to take care of land and they will	1
Tourism attracts more people to area	1
Tourism could improve services/infrastructure, attract industry	1
Tourism encourages disappearance of open space, peace	1
Tourism in county has been attempted and failed since 1910 fire	1
Tourism promotion preferable to attracting mining and logging	1

Appendix A: Sanders County Survey Instrument

Please include any additional comments below:

Resident Attitudes Toward Tourism in Sanders County



Fall 2002

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

6. If Sanders County were to handle more visitors, which of the following infrastructure improvements do you think would be necessary? Please check all that apply.

- | | |
|---|---|
| <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"/> Public restrooms | <input type="checkbox"/> Recreation area access roads |
- None of these improvements are needed

7. Do you think Sanders County should actively promote Glacial Lake Missoula? Please check only one.

- No (please skip to question 8)
 Yes (please answer question 7A)

7A. IF you think Sanders County should promote Glacial Lake Missoula, how do you think this should be done?

8. Tying together the past, the present and the future of Sanders County, what is your image of the county as a whole?

9. How would you present the history of Sanders County to both residents and visitors?

PART 3. Questions concerning quality of life in your community.

1. Please rate the current condition of each of the following elements of quality of life in Sanders County. Please circle one response for each item.

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

2. Please indicate how you think the following elements of quality of life would be influenced if tourism were to increase in Sanders County. Please circle one response 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

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

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

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

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

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

1. How many years have you lived in Sanders County? _____ years in Sanders County

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

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

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

() Yes () No

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

() Male () Female

6. What is your employment status? Please check only one.

() Employed () Home maker
() Retired () Unemployed/Disabled

7. Please use the list below to let us know the type of work held by members of your household. Please check all that apply.

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

The following are comments taken from the back page of Sanders County Resident Attitude Survey. The comments are given verbatim with no interpretations made. Only grammatical corrections have been made where necessary to facilitate understanding. Due to indecipherable handwriting, parts of some comments have been omitted and replaced by underscores (_____).

- You look at the Flathead Valley, Kalispell area and include Whitefish and Columbia Falls and you can see the economic direction and results. High price land that must be subdivided to pay taxes etc. and the open space is diminished in leaps and bound with every increasing _____ and the last best place is just another economic success like Spokane suburbia where the city boundaries are life a lion's appetite. Tourism only encourages the speed with which the Lion eat the open space and reclusive peace.
- I believe tourism threatens our way of life. The jobs it will provide is just season minimum wage positions. I am very much against encouraging people to move in. I see what tourism has done to other places throughout the country and I don't like it at all. It just ruins everything for the people that live here. It is a shame.
- As you may see by my negative attitudes to tourism, I prefer no tourists. One reason for locating in western Montana was serenity, lack of people living on top of me, etc. Hoards of tourists would ruin all that I tried to get away from. No Growth.
- Sorry this is so late. I'm a Montana teacher—overworked (55 hr. average week) and underpaid (47th in the Nation). This state has higher priorities than tourism. It is a noble idea, however I think we have larger concerns. Healthcare for one.
- I can't see any change coming for Hot Springs unless enough "newcomers" make it happen.
- Like a lot of Montanans, I love my space, and would be quite happy to see no growth in industry or population. I know that's a pipe dream—but please, let's take a long view and keep the damage of growth to a minimum. Two Wal-Marts in Missoula is at least one too many! Our young people need jobs that pay a living wage—not at McDonalds or Taco Bell on every corner. Business by computers—technology—maybe our only acceptable solution.
- The only advantage I see for more people in Montana is more money for the politicians. They can get all drunked up kill somebody in a car wreck. Have the Governor destroy the evidence and get away with it with a short jail term. Not even lose their job. We don't need anymore people here.
- Sorry for making such a mess—didn't notice this space until too late. Development of tourism causes concern because of other places I've seen (Colorado and Alberta) a change of ways—not good—after tourism and consequent development and demographical changes made it impossible for middle-income families to survive in the last best places they had to raise their kids in a rural, not affluent but nonetheless healthy environment. Why aren't other options for economic development given the existing population being looked at just as carefully as tourism? The Salish-Kootenai tribe in Lake County might be/have a model in the small business development center for a place like Sanders County.
- I spent 42 years working from CA to AK. I have seen too many people, even in Alaska, and tourists are the worst. I was born and raised in a small town in central CA and watched it go to hell because of people. You have a real treasure here and I hope it stays this way. It took me 15 years and a divorce to get here. I came here to hunt and fish till I die. I love it and hope it stays this way. Where I was raised it was 100 miles from anywhere and 4 feet from hell, this place is 100 miles from anywhere and 4 feet from heaven. This is as close as I'll get. In other words, I'm here now close the gates.
- But both these places got overpopulated. Places by the river and lake got plowed over to build fast food restaurants. Pollutants from factories dumped into the water system, just for one person to make their money. Hagadon in Coeur d' Alene, took down everything he thought wasn't important (old Wilma theater) and put up Malls etc...and turned the lake into a big play pond with a layer of gas and oil on top. He has made entertainment and jobs too. I like Hot Springs because it is mostly tribal owned and I feel like they protect a lot of it, from too much growth. But good improvement, like Quinns, is great. And I like the few new things in Plains. But only certain people like Hot Springs. Because there is not much here. And that is the beauty of it.
- No envelope was included as stated below but my opinions are worth 34 cents—(I think)—maybe only two cents. One example of the bad attitude of the locals is the sheriff. Sam Tomas was the best sheriff we ever had. He was smart, very knowledgeable, very fair, and a real asset to Sanders County. The Natives didn't like him because he wasn't born and raised here. His predecessor was a child molester and his successor protects the drug dealers, re-electing Sam Tomas would really help the image of this county but these backward-minded voters won't do it.
- If you promote Glacial Lake Missoula I don't think that the Government should take, buy or acquire 1 sq. ft. of Private land for use in Glacial Lake Missoula.

- We came from an area that pushed for years. It drew people to live in the area permanently or sometime just for summer residents. But increased taxes on property due to larger more expensive home construction is now driving native residents out of the area. They can't pay taxes. Also rental cost is very prohibitive, so the average person can't live there. Service jobs don't pay enough to compensate. I know this is all true as it has greatly affected us personally. People on fixed and low incomes can't live there anymore. Also, tourism is very seasonal so any incomes only last a short time. We need types of industry that are year round so all, young and old, can live with a decent living, not from day to day.
- We have many people come from out of state and we show them all kinds of things but mostly free things and uncontrolled things like the mountains, rivers, streams, sky, stars. We also travel a lot but we do not go to controlled tourist sights. We like to see natural things and read guides as we travel along, no "do not park" that take your money but give you very strict rules. To be helpful to tourists is great but don't act like God and make all kinds of "do not rules." Trust people to take care of the land and they will.
- The largest problem with living in Plains, MT is the greedy merchants, namely "McGowans" grocery store, we call them "McGougens." They make sure that there is no competition moving in. It has caused us, as well as others to drive and shop in Missoula or Kalispell. Needless to say, they have a monopoly. Visitors from different parts of USA as well as Montana have said that their prices are the worst they have ever seen. "Benji's" restaurant is rated by everyone as the best for quantity, quality, cleanliness, and service. They evidently don't by their restaurant needs from "McGougens." "Benji's" is also the most affordable. If "Benji's" can do it, why can't the other merchants do it and keep the business (money) here? Tourist trade would only make them even more greedy. I've lived in places where this always happens during tourist season.
- Questions, as written, are hard to understand and could produce a misdirected or ambivalent response. Confusing at best! I think this particular survey could be improved and be better focused.
- I do not want additional tourism in Sanders County, outside people coming in ruin camping, fishing, hunting and degrade our way of life.
- Plains area is nice, friendly and pretty. But I was born and raised in Polson, so I do have strong attachment there— But I enjoy living here and I can always visit Polson area. Plains is a nice place to raise children in. I have only lived here year round for 7 years—but we have owned our place here for over 20 years.
- Sanders County needs good paying jobs to support families. Manufacturing or light industry would be nice. Tourism unfortunately would not bring enough high paying jobs to support families. It would help some people who now have jobs or very low paying jobs. Some alternatives: 1) Create information technology jobs not dependent on moving goods in and out. Deregulation of electric power will hurt this area. (Poor legislation) 2) Manufacturing or light industry—limited by transportation in and out. 3) Tourism—better than what we have now and could help improve infrastructure and services that would help attract investment in alternatives 1 or 2.
- We would much rather see Montana promote tourism instead of trying to attract more mining and rejuvenate lumbering. Next to that, promote "clean" industries. Mostly...with the Baby Boomers, attract retirees with the beauty, quiet, peaceful, NATURAL elements that abound in MT. This would produce "real" tax returns to improve education, parks, roads, retailers and all commerce without destruction of Montana's unsurpassed natural beauty. Hook them as visiting tourists, gaff them with safety, neighborliness and reasonable living costs. Land them with the lack of bureaucratic meddling in their lives.
- What a fabulous place to live!! We need to make it a fabulous place for all to earn a living. Even though this does not apply to us personally I'd like to see families be able to offer their children job opportunities here—so they can remain in Sanders if they wish. I want to be prouder of the initial look of T.F.—weeds controlled, entry moved, business' painted and residential areas clean and "vehicle junk" gone.
- Tourists are destroying our way of life—farms and ranches are being lost to subdivisions. Timber jobs are gone—our forests are dying. Mills are closed—all that is left are low paying tourist jobs and if you're lucky a county or state job. They move here—put up no trespassing signs and lock up our county. We are also being taxed out of our homes because they pay outrageous prices for property—taxes up—no good paying jobs and land being priced out of our ability to buy. I HATE what they are doing to our beautiful county.
- I believe if the previous administration would have left the money in the bank we would not be in the shape we are in. The wealthier who could afford to be taxed got all the money—now the poorer people need to make sacrifices to make ends meet while the wealthy enjoy their tax breaks—the same goes for feds.
- Currently the Tourism is counted by the room tax. Most of the rooms are rented by out of town workers. I'd say approx. 80%. Spring Creek is our largest employer, but everybody can't work there. We need more timber sales to get the mills open and put more people to work. Most of the west end relies on timber products. The pipeline crews and phone people make up a big % of the tourist tax, plus the delivery people that stay in the county are here on long deliveries.

- We need to be realistic. Gambling Casinos do not improve local economy OR improve quality of life anyone, especially those of us who really do live here. More restaurants/bars/motels, to compete with those already struggling to survive here year-round, would not improve life here. Spending money (no matter how “free” it might look), to create a few low-paying jobs that rely on the seasonal appearance of a few tourists who are trying to stretch their vacation dollars to the park and back home, is not a wise investment. Light manufacturing or service industry could better benefit our county and those who want to live here! I realize that my views may “clash” with your project. Just keep in mind please that it’s easy to overlook some aspects, such as my postage-paid envelope.
- Thompson Falls needs more parking for RVs in town—a bus service to show attractions not easily accessed by RVs. More up to date water access throughout county—Drop the Tourist Tax!!
- My husband 87 and I are both WW two veterans—I, an RN at Patton’s 3rd Army and my husband a Master Mechanic with the Army engineers.
- Use combined advertising dollars that may be available thru the bed tax, grants for tourism, etc, to promote the area businesses thru radio, flyers, newspapers and possibly television. (Depending on \$ availability.) Include all the small businesses in an area that are tourist related!
- Of all the last, best places this is the “bestest.”
- Thank you for this opportunity to add input. I feel that Sanders County is a magnificent area to live and visit and look forward to the growth, development and change.
- It seems that your survey was setup to give a positive response to tourism no matter how you answer the questions.
- In Montana, as a whole, it has always been a “home entertainment” state, and particularly away from the larger cities. One entertains themselves with what is at hand in their home environment. It is the difference between “Country life” and City life.” It is not economically feasible to incorporate the two. My family has been involved in both wholesale and retail businesses, logging and farm/ranch since shortly after the 1910 fire. Reliance and encouragement of Tourist Trade has been attempted all along the way with little to no success. This was done with no tax dollars involved and no elected officials wasting time and tax dollars trying to create a worse tax burden. We already have tourist traps with great things to offer and they are not making it anymore either. I am referring to Glacier Park and Yellowstone. If these places that are strictly set up for tourism, at great expense are not able to make ends meet and maintain up-keep, how can anyone in their wildest dreams believe a county or whole state could achieve this goal. The people of Sanders County are not wealthy people. The job base in the County is all but gone now except for one employed by government in one form or another. Communities must have industry of some form to grow and prosper or they fall into decay and soon become only a memory. Our whole nation is now following this trend. Our industry is now all in other countries and our homeless and unemployed area picture of the future unless a lot of changes are made soon.
- 1-What Spring Creek and Sanders Co. do at Christmas time for residents and tourists is fantastic. It is a memory that folks have taken with them. The parade, the coffee, tea, choca, cookies, and food that is provided makes being in Sanders Co. something to be proud of. 2-Bottom line is Sanders Co. needs work for their people. There is a work for _____ here but no work. 3-Housing needs to be affordable to the wages paid in MT. 4-Tourism: If Silverwood can do it, why can’t Sanders Co. Whitepine area would be a good place. Tourists from Washington, Canada, and Idaho. Summer employment for residents. Whitepine area centrally located for residents from Heron to Plains.