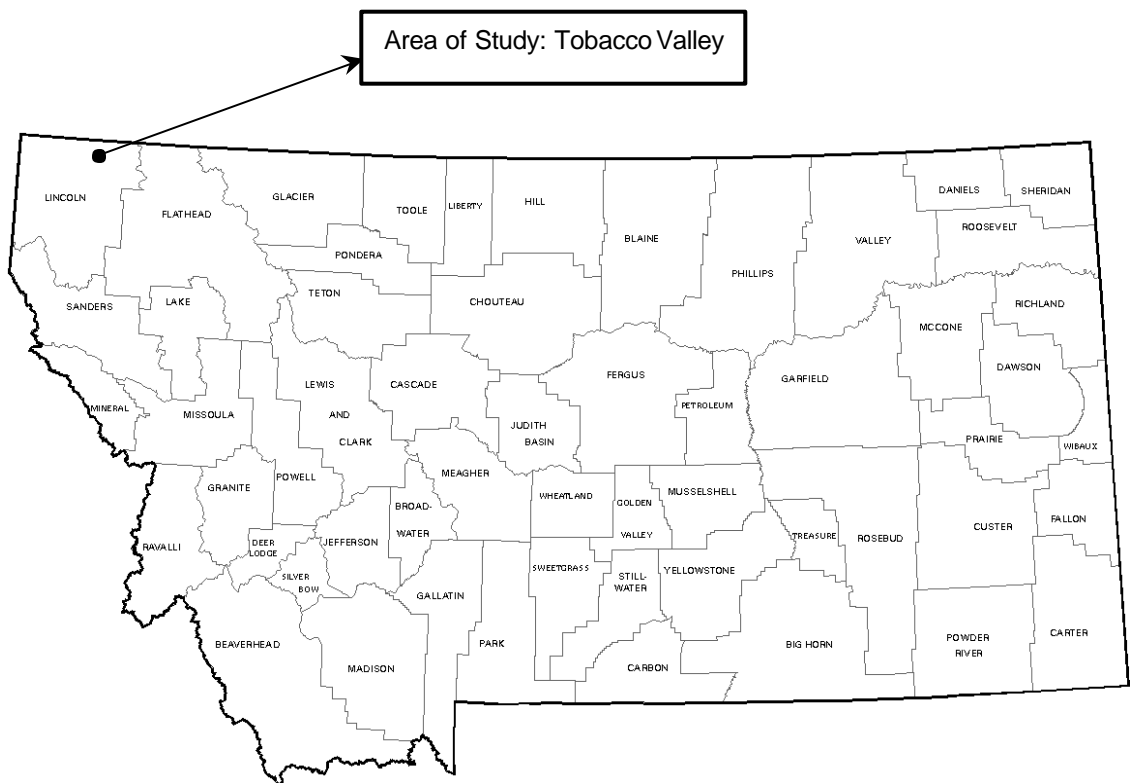

Tobacco Valley, MT Resident Attitudes:

Exploring Tourism Development Potential
CTAP 2002-2003



Research Report 2003-2
February 2003

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Prepared by

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Executive Summary

This report presents information about tourism in the Tobacco Valley, Montana. The report offers estimated travel volume and traveler characteristics for visitors to Lincoln County, which encompasses most of the Tobacco Valley and is used as its proxy. This information was gathered from ITRR's 2001 Nonresident Travel Survey. The report also includes the results of a Tobacco Valley resident attitude survey, providing residents' opinions and attitudes regarding tourism and tourism development in the state and in the Valley, along with the results of a statewide survey for comparative purposes.

A mail-back questionnaire was administered to a randomly selected sample of 575 Tobacco Valley 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 210,150 (9%) passed through Lincoln 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 Lincoln County, nonresident visitors spent over \$12 million, or about \$654 per county resident.
- Travelers to Lincoln County stayed in the state three times as long as statewide visitors.
- Lincoln County visitors traveled mainly as couples, but also as families.
- Overnight visitors to Lincoln County were less likely than statewide visitors to stay in a hotel or motel, but about equally likely to stay in a campground (public or private).
- The majority of Lincoln County overnight visitors had an annual income of \$60,000 or more.
- Seventy-one percent of overnight visitors to Lincoln County were in Montana primarily for vacation, while 15 percent were in the state primarily to visit friends and relatives.
- Vacationers in Lincoln County were attracted to Montana primarily because of Glacier National Park.
- Shopping was the activity engaged in the most often by overnight visitors to Lincoln County, followed by wildlife watching and picnicking.
- Visitors to Flathead County spent the largest portion of their money in restaurants/bars and on gasoline/oil

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

- Respondents from the Tobacco Valley have resided in their community and in the state for a slightly shorter time than the statewide sample.
- Montana natives comprised over one-third of the Tobacco Valley sample.
- The largest portion of Tobacco Valley respondents earns their household income in the forestry/forest products sectors, followed by the construction sector.
- The majority of Tobacco Valley respondents feel tourism should have a role equal to other industries in the local economy, but ranked the tourism and recreation industry 7th on a list of desired economic development options.
- Most Tobacco Valley respondents work in places that supply little or none of their products or services to tourists or tourist businesses.
- Only 15 percent of Tobacco Valley respondents have frequent contact with tourists, but close to two-thirds of respondents enjoy interacting with tourists.
- Tobacco Valley respondents have a stronger attachment to their community than do statewide respondents. Both groups are somewhat concerned about the future of their communities.
- Ninety-six percent of Tobacco Valley respondents feel that the population in the area is increasing, and of those, most feel it is increasing at the right rate.

- Tobacco Valley respondents feel improving the condition of job opportunities, as well as cost of living, and museums and cultural centers can enhance their quality of life.
- The respondents of the Tobacco Valley are somewhat unsupportive of tourism development, in contrast to the statewide sample, which was found to be somewhat supportive.
- Respondents feel strongly that any decision about tourism development should involve local residents and not be left entirely to the private sector.

CONCERNS OF TOBACCO VALLEY RESIDENTS (2002 Survey Data):

- Tobacco Valley respondents value the area's friendly people and the sense of community they get living here, and would like to see these characteristics continue into the future.
- Tobacco Valley respondents dislike catering to tourists and the tourists industry, hap-hazard development and subdivisions, and new people moving to the area.
- Respondents feel various types of businesses are missing from the area and also desire more recreation areas.
- Respondents see the areas numerous recreation possibilities as the Tobacco Valley's greatest strength as a tourist destination. They consider the current lack of hotels and restaurants the primary weaknesses.
- To better market the Tobacco Valley as a tourist destination, respondents suggested focusing on outdoor recreation and on the area's scenic beauty.
- As a way to expand the current success of events already existing in the Tobacco Valley, some respondents suggested expanding the events themselves, along with their facilities, and others suggested more advertising.
- When asked what features of the Tobacco Valley would have the potential to attract both new and repeat visitors, the majority suggested the Kootenai National Forest.
- When Tobacco Valley respondents have friends and family come visit, they take them to the Ten Lakes area, as well as to Lake Koocanusa and to the waterfalls in the Valley.
- When asked what safety infrastructure would be needed should tourism increase in the Valley, respondents suggested improved medical and emergency services, closely followed by road and intersection safety.
- Increased revenue for community businesses is perceived as the primary advantage of increased tourism in the Tobacco Valley, while more people and crowding are seen as the leading disadvantages.

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Introduction

This report is intended to provide a profile of current visitors to the Tobacco Valley¹, 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. The first section 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 2001². Due to limited sample sizes, reliable data is only available at the county level. For this reason, local profile information is provided for Lincoln County rather than the Tobacco Valley. The profile was developed from the subset of surveys submitted by nonresident travelers spending a night in the county.

The second section of this report contains an assessment of resident attitudes toward tourism and the travel industry in the Tobacco Valley. This assessment is the result of mail-back questionnaires obtained from households in the Tobacco Valley in the fall of 2002. 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 the Tobacco Valley and in Montana as a whole.

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

¹ The Tobacco Valley is located in the north-west corner of Montana, and encompasses some of the communities of Lincoln County (Eureka, Fortine, Rexford, Stryker and Trego), as well as the community of Olney in Flathead County.

² 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 was obtained through a mail-back diary questionnaire administered to a sample of intercepted travelers in the state. During the four-month study period, 7,738 groups were contacted. Usable questionnaires were returned by 2,931 groups, resulting in a response rate of 40 percent. A sample of 278 respondent groups traveled through Lincoln County in the summer of 2001 (Table 1).

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

Nonresident groups contacted	7,738
Usable questionnaires returned	2,931
Nonresident Travel Study response rate	40%
Lincoln County sample size	278
Percent of nonresident sample	9%

A Profile of Current Summer Visitors

ITRR nonresident travel estimates report that approximately 2,153,200 groups visited Montana during the 2001 **summer** season³. 2001 nonresident survey data indicates that each travel group averages 2.5 people. It was estimated that 9 percent, or 193,800, of those groups passed through Lincoln County, and that 18 percent of those who traveled through spent at least one night there.

Group Characteristics

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

Lincoln County: Most Montana visitors who spent at least one night in Lincoln County traveled as couples (53%), while 28 percent traveled with family. Eighty-seven percent of travelers had visited Montana before this trip, while 25 percent had previously lived in the state. Visitors stayed in the state for an average of 13.4 nights, and the largest portion of summer visitors chose to spend their nights in a hotel or a motel (34%). Most respondents indicated having an income of over \$60,000 per year, with 9 percent making over \$100,000 and only 2 percent making less than \$20,000.

³ 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.

Statewide: For visitors to the state as a whole, the largest portion traveled as couples as well (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 one-third that of Lincoln 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.

Table 2: Characteristics of Nonresident Summer Visitors

	Lincoln County*	Statewide
Group Type		
Couple	53%	41%
Family	28%	32%
Alone	10%	14%
Friends	6%	6%
Family & friends	--	5%
Business associates	--	1%
Organized group	3%	1%
Have previously visited Montana	87%	76%
Have previously lived in Montana	25%	16%
Nights spent in Montana	13.4	4.2
Accommodations used in Montana**		
Hotel or motel	34%	46%
Home of friend or relative	18%	16%
Public campground	17%	11%
Private campground	12%	14%
Private cabin/2 nd home	4%	4%
Resort/condo	2%	3%
Guest ranch	--	<1%
Rented cabin/home	--	3%
Other	15%	3%
Income		
Less than \$20,000	2%	7%
\$20,000 to \$39,999	18%	17%
\$40,000 to \$59,999	26%	25%
\$60,000 to \$79,999	38%	20%
\$80,000 to \$99,999	7%	11%
Over \$100,000	9%	21%

Source: ITRR 2001 Nonresident Study

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

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

Visitors to the state as well as to Lincoln County were from a variety of origins. Washington figures prominently on both lists, as does California. However, a large portion of Lincoln County visitors came from Florida, while statewide visitors came from Idaho and Minnesota in significant numbers (Table 3).

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

Rank*	Lincoln County**	Statewide
1	Washington	Washington
2	Florida	California
3	Alberta	Idaho
4	California	Minnesota
5	Oregon	UT, ND, OR, WY, CO, ALB

Source: ITRR 2001 Nonresident Study

* 1=highest frequency

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

Information Sources

Nonresident travel groups indicated which information sources were used as planning tools for their trip *prior* to arriving in Montana, as well as *while* they were in Montana. Also, respondents indicated which of the sources were most useful to them. A list of 9 pre-trip and 5 Montana information sources was included in the questionnaire (Tables 4 and 5).

Lincoln County: Forty-eight percent of visitors to Lincoln County did not use any of the listed sources prior to their trip. The four *most frequently used* sources of travel information were the Internet (37%), AAA (17%), and travel guide books and National Park brochures (13% each). The *most useful* sources of travel information used prior to arriving in Montana were the Internet (29%), AAA (22%), and travel guide books (20%).

Statewide: Thirty-four percent of statewide visitors did not use any of the 9 listed information sources prior to travel. However, 43 percent used the Internet, 26 percent used AAA, and 18 percent used National Park brochures. The *most useful* sources of information used prior to travel included the Internet (38%), AAA (25%), and travel guide books (10%).

Table 4: Sources of Information Used Prior to Visiting Montana

Information Sources	Lincoln County		Statewide	
	All Sources*	Most Useful Source	All Sources*	Most Useful Source
The Internet	37%	29%	43%	38%
AAA	17%	22%	26%	25%
Travel guide book	13%	20%	14%	10%
National Park brochure	13%	8%	18%	7%
Montana Travel Planner	10%	5%	9%	6%
1-800 State travel number	--%	--	2%	1%
Information from private businesses	8%	10%	9%	7%
Chamber or visitor bureau	8%	6%	9%	5%
Travel agency	4%	--	4%	3%
<i>None of the sources</i>	48%	N/A	34%	N/A

Source: ITRR 2001 Nonresident Study

* Visitors could indicate more than one information source.

Lincoln County: Visitors were also asked where they received travel information while *in* Montana. Of overnight visitors to Lincoln County, 20 percent used none of the sources listed. However, the travel information sources that were used included brochure racks (60%), persons in motels, restaurants, gas stations, etc. (43%), and highway information signs (40%). Visitors then indicated what source was the *most useful* while traveling *in* Montana. Thirty percent of respondents stated that people at information centers were most helpful, followed by brochure racks (27%) and service people (23%).

Statewide: Thirty-four percent of statewide visitors indicated that while *in* Montana, they did not use any of the information sources listed. However, 35 percent obtained travel information from highway information signs. Other prominent information sources were service persons (30%) and brochure racks (28%). Of the information sources used while *in* Montana, statewide visitors indicated that the *most useful* were persons in visitor information centers (29%) and highway information signs (26%).

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

	Lincoln County		Statewide	
	All Sources*	Most Useful Source	All Sources*	Most Useful Source
Brochure racks	60%	27%	28%	18%
Person in motel, restaurant, gas station, etc.	43%	23%	30%	24%
Highway information signs	40%	17%	35%	26%
Info center person	36%	30%	27%	29%
Business billboards	5%	3%	12%	5%
<i>None of these sources</i>	20%	N/A	34%	N/A

Source: ITRR 2001 Nonresident Study

*Visitors could indicate more than one information source.

Purposes of Summer Trip

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

Lincoln County: Ninety-one percent of Lincoln County visitors indicated that vacation was one reason for traveling to Montana. Other frequently cited reasons included visiting family or friends (37%) and passing through the state (17%).

With respect to Lincoln County overnight visitors' *primary* reason for visiting the state, almost three-quarters (71%) were in Montana primarily on vacation. A significantly smaller portion (15%) were in the state *primarily* to visit family or friends.

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.

Table 6: Reasons for Traveling to Montana

	Lincoln County		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	91%	71%	72%	52%
Visit family or friends	37%	15%	28%	15%
Passing through	17%	%	30%	21%
Business	3%	%	8%	7%
Shopping	4%	%	6%	1%
Other	10%	8%	7%	4%

Source: ITRR 2001 Nonresident Study

* Visitors could indicate more than one reason.

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

Montana Attractions

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

Lincoln County: Many Lincoln County vacationers were attracted by more than one of the state's many features. The top five Montana attractions were Glacier National Park (63%), the mountains (55%), rivers and lakes (53%), open space (52%), and wildlife (51%). Glacier National Park (45%) was by far the most popular *primary* attraction for Lincoln County overnight visitors.

Statewide: Statewide visitors were also attracted to Montana for many reasons. The top attractions to Montana included the mountains (42%), Yellowstone National Park (39%), open space (32%), rivers and lakes (30%), and Glacier National Park (27%). The most frequently cited *primary* Montana attractions for statewide visitors were Yellowstone National Park (22%) and Glacier National Park (19%).

Table 7: Attractions of Montana as a Vacation Destination

	Lincoln County		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
Glacier National Park	63%	45%	27%	19%
Mountains	55%	18%	42%	11%
Rivers/lakes	53%	--	30%	2%
Open Space	52%	10%	32%	10%
Wildlife	51%	--	25%	1%
Yellowstone National Park	21%	7%	39%	22%
Visiting family and friends	30%	13%	19%	12%
Camping	32%	--	18%	2%
Hiking	21%	--	16%	1%
Lewis and Clark	8%	--	8%	2%
Native American Culture	7%	--	8%	1%
Other Montana history	10%	--	10%	3%
Fishing	26%	3%	14%	4%
Plains	5%	--	7%	1%
Special Events	7%	2%	6%	4%
Other	2%	--	8%	4%

Source: ITRR 2001 Nonresident Study

* Visitors could indicate more than one attraction.

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

Visitor Activities

Some differences can be seen among the activities participated in by statewide visitors and by overnight visitors to Lincoln County in that the latter engaged in these activities at a much higher rate (Table 8).

Lincoln County: Shopping was the most popular activity among those visitors spending a night in Lincoln County (61%). Other popular activities included wildlife watching (56%), picnicking (52%), and day hiking and developed-area camping (41% each).

Statewide: For all visitors to the state as well, shopping topped the list of recreational activities (39%). Wildlife watching (36%) was popular as well, as was day hiking (33%), picnicking (29%) and visiting historic sites (26%).

Table 8: Recreational Activity Participation

	Lincoln County*	Statewide*
Shopping	61%	39%
Wildlife watching	56%	36%
Picnicking	52%	29%
Day hiking	41%	33%
Camping (developed area)	41%	23%
Camping (primitive areas)	19%	9%
Visiting Native American sites	12%	14%
Visiting Lewis and Clark sites	22%	15%
Visiting other historic sites	31%	26%
Visiting museums	17%	20%
Fishing	31%	16%
Nature studies	7%	12%
Gambling	6%	8%
River floating/rafting	4%	7%
Golfing	10%	7%
Motor boating	16%	4%
Special event/Festivals	19%	11%
Canoeing/Kayaking	4%	3%
Backpacking	--	4%
Mountain Biking	3%	3%
Road Biking	4%	3%
Sporting event	--	3%
Off-road/ATV	8%	3%
Water skiing	3%	1%
Sailing/Windsurfing	--	<1%

Source: ITRR 2001 Nonresident Study

* Visitors could indicate more than one activity.

Economic Characteristics

Information about the number of visitors to an area and how much they spend during their visit there is useful for planning purposes. While travel group characteristics are based only on groups who spent a night in Lincoln County during the summer, economic information is more inclusive and represents all groups who spent money in the county throughout the year⁴ (Table 9).

Lincoln County: Nonresident spending in Lincoln County exceeded \$12 million in 2002 (winter, spring and summer seasons), which amounted to less than 1 percent of all nonresident spending in Montana. Nonresidents spent the equivalent of \$654 per county resident, less than one-third the state per-capita average.

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

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

Distribution of Expenditures	Lincoln County	Statewide
Lodging, campgrounds, etc.	11%	15%
Auto rental and repair, transportation	3%	6%
Gas and oil	21%	23%
Restaurant, bar	23%	20%
Groceries, snacks	14%	8%
Retail sales	18%	21%
Guides/outfitters	7%	3%
Licenses, entrance fees	3%	2%
Miscellaneous services	1%	1%
Total travel groups to sample area, 2001	502,000	4,084,000
Total expenditures in sample area, 2001 (2002\$)	\$12,209,000	\$1,803,500,000
Population (2001 census estimate)	18,664	904,433
Per capita expenditures in sample area, 2001 (2002\$)	\$654	\$1,994

Source: ITRR 2001 Nonresident Study; Montana Census and Economic Information Center⁵.

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

⁴ Economic data for this report does not include expenditures made in the fall season due to incomplete data for the months of October and November.

⁵ MT Department of Commerce, Census and Economic Information Center. [Table CO-EST2001-07-27: Time series of Montana Population Estimates by County](http://ceic.commerce.state.mt.us/demog/estimate/pop/county/cty_annualseries_00to01). 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 Tobacco Valley residents in the fall of 2002. The same survey was distributed to a statewide sample in the fall of 2001 and those results are reported here as well. Both distributions followed Dillman's Tailored Design Method (TDM)⁶ to ensure maximum response rates. The 2001 state survey achieved a response rate of 40 percent, while in 2002, the Tobacco Valley resident attitude survey achieved 33 percent response.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a randomly selected sample of 575⁷ Tobacco Valley households, as well as 1,000 Montana households. The letter informed recipients of the upcoming survey and alerted them to the appearance of a questionnaire in their mailbox in the near future. Shortly thereafter, a questionnaire was mailed to the same households, along with a cover letter stating in more detail the purpose and nature of the study. For the sake of random selection, the letter also requested that the adult with the most recent birthday be the one to complete the questionnaire.

One week following the questionnaire mailing, a postcard was sent to all selected households, serving the dual purpose of thanking respondents for their efforts if they had already returned their questionnaire, and reminding those who had set it aside to complete it and return it. After two more weeks, replacement questionnaires were sent to those households that had not yet responded to the first questionnaire mailing. Included this time was a different cover letter addressing some concerns respondents may have that so far had kept them from responding. The cut-off day for accepting returned questionnaires was four weeks following the last mailing. For a copy of the survey instrument, please see 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 only 33 percent of the Tobacco Valley 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 groups⁸, responses were weighted to more closely reflect the population of the Tobacco Valley. The results presented in this report reflect the adjusted dataset.

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

	Tobacco Valley	Statewide
Resident questionnaires mailed out	575	1,000
Undeliverables	127	189
Usable resident questionnaires returned	148	328
Resident Attitude Study response rate	33%	40%

⁶ Dillman, Don A. 2000. *Mail and Internet Surveys: The Tailored Design Method*. John Wiley & Sons, Inc. New York, NY.

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

⁸ 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.

Tobacco Valley Residents' Attitudes

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

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

Respondent Characteristics

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

Tobacco Valley: Fifty-four percent of respondents to the Tobacco Valley survey were male, the average age was 50 years, and respondents ranged in age from 21 to 98 years.

Statewide: Of respondents to the statewide survey, 53 percent were male, the average age was 47 years, with the age range spanning 18 to 94 years.

Table 11: Age and Gender Characteristics

	Tobacco Valley	Statewide
Average age	50 years	47 years
Minimum age	21 years	18 years
Maximum age	98 years	94 years
Percent male	54%	53%
Percent female	46%	47%

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. Tobacco Valley respondents were asked how long they had lived in the Valley (Tables 12 and 13).

Tobacco Valley: Thirty-five percent of Tobacco Valley respondents were native Montanans. On average, they had lived in the Tobacco Valley for 22 years and in the state for 28 years. Sixteen percent of respondents had lived in the Tobacco Valley longer than 40 years, while 41 percent had lived there 10 years or less.

Statewide: A little over half (53%) of statewide respondents were born in Montana. On average, they had lived in the 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

	Tobacco Valley	Statewide
Born in Montana	35%	53%
Mean years lived in community	22 years	24 years
Mean years lived in Montana	28 years	33 years

Table 13: Community Residency

	Tobacco Valley	Statewide
10 years or less	41%	34%
11 to 20 years	19%	16%
21 to 30 years	20%	16%
31 to 40 years	4%	13%
41 to 50 years	7%	11%
51 to 60 years	3%	3%
61 years or more	6%	7%

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

Tobacco Valley: The largest portion of respondents to the Tobacco Valley resident attitude survey derived their income from the forestry/forest products sector (28%), closely followed by the construction sector (24%). Other sizeable income sources included education (13%) and wholesale/retail trade (12%). Four percent of respondents indicated that they were employed in the travel industry, however, employees in the service and retail sectors are likely to unknowingly be part of this industry.

Statewide: The most common sources of household income for statewide respondents were the education and service sectors (18% each). Other common 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 from the travel industry. As may be the case for the Tobacco Valley, 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*	
	Tobacco Valley	Statewide
Education	13%	18%
Services	8%	18%
Wholesale/retail trade	12%	15%
Health care	9%	17%
Professional	10%	15%
Forestry or forest products	28%	5%
Construction	24%	13%
Manufacturing	6%	--
Finance, Insurance or Real Estate (FIRE)	4%	6%
Clerical	7%	7%
Restaurant or bar**	9%	6%
Transportation, Communication or Utilities	11%	8%
Armed Services	4%	4%
Agriculture	9%	13%
Other	5%	6%
Travel industry	4%	3%

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

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

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. Please note that this is not a feasibility assessment but rather a economic development wish-list (Tables 15 and 16).

Tobacco Valley: The majority (52%) of Tobacco Valley respondents believe that the travel industry should have a role equal to other industries in the local economy, while only 9 percent feel it should have a dominant role. Tourism/recreation ranked seventh out of eight as a desired 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

	Tobacco Valley	Statewide
No role	13%	4%
A minor role	26%	20%
A role equal to other industries	52%	62%
A dominant role	9%	14%

Table 16: Most Desired Economic Development

	Tobacco Valley		Statewide	
	Rank	Mean*	Rank	Mean*
Wood Products	1	2.30	7	5.68
Agriculture/Agribusiness	2	3.85	3	3.60
Services	3	4.09	1	3.39
Wholesale/retail trade	4	4.26	4	3.71
Manufacturing	5	4.28	6	4.51
Technology	6	4.61	2	3.42
Tourism/Recreation	7	4.83	5	4.22
Mining	8	6.60	8	7.09

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

Dependence on Tourism

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

Tobacco Valley: Seven percent of Tobacco Valley respondents indicated that their place of employment provides a majority of their products or services to tourists or tourist businesses. Fifty-nine percent work in places that provide none of their products or services to tourists or tourist businesses.

Statewide: At the state level as well, 7 percent of 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

	Tobacco Valley	Statewide
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	7%	7%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	34%	45%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	59%	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 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).

Tobacco Valley: When asked about the frequency of their interactions with tourists, fifteen percent indicated that they have frequent contact. Another 27 percent reported that they have infrequent contact with tourists visiting the Tobacco Valley. Although the frequency of interaction is relatively low, the majority (59%) of Tobacco Valley residents enjoy meeting and interacting with tourists when the occasion arises. Only 11 percent of respondents do not enjoy meeting and interacting with visiting tourists.

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

Table 18: Frequency of Contact with Tourists Visiting Community

Degree of Frequency	Tobacco Valley	Statewide
Frequent contact	15%	16%
Somewhat frequent contact	26%	27%
Somewhat infrequent contact	32%	26%
Infrequent contact	27%	31%

Table 19: Attitude Toward Tourists Visiting Community

Attitude	Tobacco Valley	Statewide
Enjoy meeting and interacting with tourists	59%	68%
Indifferent about meeting and interacting with tourists	30%	28%
Do not enjoy meeting and interacting with tourists	11%	4%

Community Attachment and Change

One measure of community attachment is the length of time and portion of life spent in a community or area. These statistics were reported earlier in the report (Table 12). Other measures are based on opinions that residents have about their community and perceived changes in population levels.

Community Attachment: To assess community attachment, respondents were asked to indicate their level of agreement with each of four statements on a scale from -2 (strongly disagree) to +2 (strongly agree). A mean response greater than 0 indicates aggregate agreement with the statement in question (Table 20).

Tobacco Valley: The Index of Community Attachment (i.e. the mean of the scores for the four community attachment statements) indicates that Tobacco Valley respondents are indeed attached to their community. An average rating of 0.95 indicates these people like where they live. They were positive in their feelings about their community, except for in regard to opinions about the future. At -0.02, this item received the lowest score, and its negativity indicates that residents have less confidence when it comes to the future of the Tobacco Valley.

Statewide: For respondents to the statewide survey, the Community Attachment Index produced a score of 0.76, which is lower than that of the Tobacco Valley. Still, it is safe to say that Montana residents, in general, are attached to their communities. However, as was the case with Tobacco Valley respondents, statewide respondents also rated the future of their community lower than the other items in the index, but with a score of 0.26, they are still more optimistic than Tobacco Valley respondents.

Table 20: Community Attachment Statements

	Tobacco Valley Mean*	Statewide Mean*
I'd rather live in my community than anywhere else.	1.20	0.78
If I had to move away from my community, I would be very sorry to leave.	1.23	0.76
I think the future of my community looks bright.	-0.02	0.26
It is important that the residents of my community be involved in decisions about tourism.	1.39	1.24
Index of Community Attachment**	0.95	0.76

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

** Index score is the mean of the mean scores for the four Community Attachment Statements.

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 developers. It is also necessary to understand how residents perceive increased tourism will change this current condition. Such perceptions define residents' attitudes toward this type of community development.

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

Tobacco Valley: Tobacco Valley respondents indicated that they are relatively satisfied with quality of life variables in their community. The items receiving the most favorable ratings were overall community livability, cleanliness and appearance, safety from crime, and parks and recreation areas. Of these items that were ranked as being in the best current condition, only parks and recreation areas are expected to be mostly positively influenced by increased tourism activity. Tourism is expected to have both positive and negative influence on overall community livability, cleanliness and appearance, while safety from crime is expected to be negatively influenced.

A few items were rated as being in less than good condition, including job opportunities, museums and cultural centers, and cost of living. While a large portion of respondents (72%) indicated that they expect increased tourism development to have a positive influence on museums and cultural centers, both traffic congestion (72%) and safety from crime (50%) are expected to be negatively influenced.

Statewide: Overall, statewide respondents were more satisfied with the current condition of quality of life than Tobacco Valley respondents. At this level, however, 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 parks and recreation areas and job opportunities. Negative influence is expected for the level of traffic congestion.

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

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

	Tobacco Valley Mean*	Statewide Mean*
Infrastructure	0.40	0.56
Overall community livability	1.20	1.27
Emergency services	0.85	1.19
Safety from crime	0.90	1.02
Parks and recreation areas	0.89	1.05
Overall cleanliness and appearance	0.98	0.82
Education system	0.52	0.73
Traffic congestion	0.56	0.44
Museums and cultural centers	-0.08	0.84
Conditions of roads and highways	0.40	0.31
Cost of living	-0.08	0.00
Job opportunities	-1.51	-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.

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

	Tobacco Valley				Statewide			
	Negative Influence*	Positive & Negative Influence*	Positive Influence*	Mean Score**	Negative Influence*	Positive & Negative Influence*	Positive Influence*	Mean Score**
Emergency services	19%	56%	25%	0.05	16%	56%	28%	0.12
Safety from crime	50%	42%	8%	-0.43	36%	49%	15%	-0.20
Overall community livability	31%	44%	25%	-0.06	10%	63%	27%	0.17
Parks and recreation areas	27%	34%	39%	0.13	13%	40%	47%	0.33
Infrastructure	49%	30%	20%	-0.29	30%	43%	27%	-0.02
Overall cleanliness and appearance	32%	40%	28%	-0.04	24%	48%	28%	0.03
Education system	24%	34%	42%	0.19	9%	50%	41%	0.31
Museums and cultural centers	15%	13%	72%	0.57	1%	16%	83%	0.82
Conditions of roads and highways	47%	32%	21%	-0.26	38%	34%	28%	-0.09
Traffic congestion	72%	18%	10%	-0.61	68%	24%	8%	-0.60
Cost of living	47%	32%	21%	-0.27	28%	49%	23%	-0.06
Job opportunities	13%	39%	48%	0.35	6%	28%	66%	0.60

* Percentages may not add to 100 due to rounding.

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

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).

Tobacco Valley: Most (67%) of Tobacco Valley 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. Sixty-two percent feel that their community is a good place for tourism investment, while 53 percent indicated that they believe increased tourism will help their community grow in the right direction. Fifty-eight percent of respondents also feel that any negative impacts of tourism are outweighed by its benefits. The majority (60%) of Tobacco Valley respondents feel that tourism promotion by the state benefits their community economically, but less than half (44%) believe that jobs in the travel industry offer opportunities for advancement. Even fewer (39%) feel that overall quality of life for Montana residents will improve with increased tourism. The majority of respondents (72%) do not see a connection between increased tourism in the community and a more secure income for themselves, just as 76 percent do not think that increased tourism will lead to any financial benefit on their part.

Based on these responses, the Tobacco Valley Index of Tourism Support (i.e. the mean of the average scores for each statement) equals -0.20. While respondents clearly do see an economic benefit to their community coming from tourism, they do not wholeheartedly support the types of jobs they perceive as resulting from tourism. Neither do they see a connection between economic benefit to the community and personal benefit to themselves. Responses to these statements are contributing to the Index score being negative, suggesting that Tobacco Valley residents are somewhat unsupportive of tourism development.

Statewide: On the whole, statewide respondents are more supportive of tourism and the travel industry than Tobacco Valley respondents. The average score for each statement is consistently higher for statewide respondents than it is for Tobacco Valley 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 influence them personally in an economic way. Sixty-two percent do not see a connection between increased tourism and an increased or more secure income for themselves, and 70 percent do not think they will benefit financially if tourism were to increase in their community. However, the statewide responses produced an average score of 0.18 in the Index of Tourism Support, indicating that on average, Montana residents are somewhat supportive of tourism development.

The perceived lack of connection between tourism development and personal benefit may be one of the main obstacles currently facing this type of development in the state, and also a reason for the 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

	Tobacco Valley					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	23%	10%	54%	13%	0.23	7%	12%	63%	18%	0.72
My community is a good place to invest in tourism development.	17%	21%	49%	13%	0.20	9%	26%	51%	14%	0.37
Increased tourism would help my community grow in the right direction.	23%	24%	36%	17%	-0.06	8%	27%	53%	12%	0.35
The overall benefits of tourism outweigh the negative impacts.	26%	16%	50%	8%	-0.02	4%	25%	62%	9%	0.47
Tourism promotion by the state of Montana benefits my community economically.	15%	25%	49%	11%	0.15	5%	17%	61%	17%	0.67
I believe jobs in the tourism industry offer opportunity for advancement.	23%	33%	38%	6%	-0.29	10%	41%	43%	6%	0.00
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	24%	37%	35%	4%	-0.41	10%	37%	49%	4%	0.00
If tourism increases in my community, my income will increase or be more secure.	35%	37%	24%	4%	-0.76	24%	38%	30%	8%	-0.39
I will benefit financially if tourism increases in my community.	36%	40%	20%	4%	-0.82	25%	45%	25%	5%	-0.60
Index of Tourism Support**	-0.20					0.18				

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

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

Index of Tourism Concern

The main issues of concern regarding tourism development deal with wage levels as well as crowding. Responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement, while a negative score indicates disagreement (Table 26).

Tobacco Valley: Well over three-fourths (83%) of Tobacco Valley respondents believe that most tourism jobs pay low wages. Fifty-four percent feel that tourists do not pay their fair share for the services they use, while 67 percent agree that vacationing in Montana influences too many people to move to the state. The majority (42%) does not feel the state is becoming too crowded because of tourists, but 42 percent still feel that out-of-state visitors limit their access to recreation opportunities.

Again, the people of Tobacco Valley 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 area¹¹ and blame this in part on all the visitors who come to the area each year. The Index of Tourism Concern equals 0.43 for Tobacco Valley, considerably higher than for the state as a whole, indicating a level of concern regarding tourism development.

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

With lower scores in all categories, the Index of Tourism Concern will inherently 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

	Tobacco Valley					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.	1%	16%	52%	31%	0.97	2%	18%	58%	22%	0.79
Tourists do not pay their fair share for the services they use.	6%	40%	31%	23%	0.26	4%	41%	38%	17%	0.24
Vacationing in Montana influences too many people to move to the state.	2%	31%	33%	34%	0.67	8%	41%	32%	19%	0.12
In recent years, Montana is becoming overcrowded because of more tourists.	10%	32%	30%	28%	0.33	11%	46%	30%	13%	-0.12
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	12%	46%	21%	21%	-0.06	11%	53%	23%	13%	-0.27
Index of Tourism Concern**	0.43					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.

¹¹ Between 1991 and 2001, the population of Lincoln County increased by 6 percent, compared to the state growth rate of 12 percent. However, between 2000 and 2001, county population dropped by approximately 1 percent as a combination of low birth rates, higher death rates and out-migration.

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).

Tobacco Valley: Sixty-three percent of respondents agree that there is adequate undeveloped open space in the community while 70 percent are concerned about the potential disappearance of what does exist. Fifty-eight 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 60 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

	Tobacco Valley					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
There is adequate undeveloped open space in my community.	21%	16%	51%	12%	0.18	8%	33%	47%	12%	0.21
I am concerned with the potential disappearance of open space in my community.	3%	27%	33%	37%	0.75	7%	33%	37%	23%	0.37
I would support land use regulations to help manage types of future growth in my community.	25%	17%	43%	15%	0.08	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), and as before, a positive score indicates agreement while a negative score indicates disagreement (Table 28).

Tobacco Valley: Tobacco Valley respondents feel strongly that residents should be involved in decision-making regarding local tourism development. Ninety-six percent of respondents either agreed or agreed strongly that it is important that residents be involved in decisions about tourism, while only 45 percent agreed that decisions regarding tourism volume are best left to the private sector, thus emphasizing their 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%), indicating that the public needs to be involved at all levels.

Table 28: Tourism-related Decision-making

	Tobacco Valley					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*
It is important that residents of my community be involved in decisions about tourism.	1%	3%	48%	48%	1.39	2%	6%	51%	41%	1.24
Decisions about how much tourism there should be in my community are best left to the private sector.	21%	34%	22%	23%	0.09	26%	41%	25%	8%	-0.50

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

Questions Specific to the Tobacco Valley

The Tobacco Valley 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.

Tobacco Valley Characteristics

The following three items deal with characteristics, both positive and negative, of the Tobacco Valley. 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, 30 and 31).

Valued characteristics of the Tobacco Valley: Respondents were asked what characteristics of the Tobacco Valley they value and would like to see continued into the future. At the top of the list was the friendly people and sense of community (24%), but residents also appreciate the area's scenery and open space (12%), and the rural lifestyle and the family values associated with it (11%).

•

Table 29: Valued Characteristics of the Tobacco Valley

Characteristics	Number of Respondents*	Percent of Responses**
Friendly people/sense of community	49	24%
Scenery/Wilderness/Open space	25	12%
Rural lifestyle/Family values	23	11%
Small-town atmosphere/Small communities	20	10%
Recreation opportunities	20	9%
Natural resource economy	17	8%
Clean (good air and water quality)	11	5%
Solitude/Isolation	10	5%
Low crime	8	4%
Retail	6	3%
Little traffic	5	2%
Open roads in national forest	3	1%
Slow pace/Quiet	2	1%
Slow growth	2	1%
No subdivision of properties	1	<1%
Wildlife	1	<1%
Lack of government bureaucracies	1	<1%
Less tobacco	1	<1%
Support for education	1	<1%
Ranching	1	<1%
No malls	1	<1%
Medical facilities	1	<1%
Retirement facilities	1	<1%

* Respondents could offer more than one suggestion.

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

Disliked characteristics of the Tobacco Valley: Planning for desired conditions is one thing, however, one also has to be careful to avoid undesirable conditions. To that end, respondents were asked to identify what characteristics of the Tobacco Valley they dislike and would not like to see continued into the future. The primary concern turned out to be catering to tourists (10%), but 9 percent are also concerned with haphazard development, and another 9 percent worry about people moving to the area.

Table 30: Disliked Characteristics of the Tobacco Valley

Characteristics	Number of Respondents*	Percent of Responses**
Catering to tourists/Tourism industry	16	10%
Hap-hazard development/Subdivisions	15	9%
People moving here	15	9%
Lack of employment/Low wages	14	8%
Speeding, traffic	12	7%
Change/Outside influences	9	5%
Rapid growth, crowding	9	5%
Close-mindedness/Short-sightedness	7	4%
Welfare recipients (low-income families)	7	4%
More gambling, bars, taverns	6	4%
Loss of resource-based economy	5	3%
Increasing taxes	5	3%
Commercial development, chain stores and restaurants	4	2%
More laws	4	2%
Logging (natural resource extraction)	3	2%
Pollution	3	2%
Local government	3	2%
Closing of national forests	3	2%
Higher cost of living, property values	3	2%
Closing of public schools	3	2%
Over-zealous law enforcement	3	2%
Run-down appearance	3	2%
Crime, drugs	2	1%
Businesses closing	2	1%
Non-diverse economy	2	1%
Lack of timber stewardship/Clear-cutting	1	<1%
Attitude of "no hope" in residents	1	<1%
Unfriendliness towards tourists	1	<1%
Poor road conditions	1	<1%
Policies and attitudes of the Forest Service	1	<1%
"Good ol' boy" system	1	<1%
Predator control	1	<1%
Lack of cultural activities	1	<1%
Environmental actions	1	<1%
None	1	<1%
Lax law enforcement	1	<1%

* Respondents could offer more than one suggestion.

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

Missing characteristics of the Tobacco Valley: Another facet of planning, in addition to learning what should be kept, is finding out what positive aspects can be developed within the community. In response to the question of what is missing from the Tobacco Valley that residents would like to see in the future, 19 percent answered “businesses.” Some would also like to see more recreation areas and more jobs (11% each).

Table 31: Characteristics Missing from the Tobacco Valley

Characteristics	Number of Responses*	Percent of Responses**
Businesses (stores, restaurants, hotels, gas station, movie theatre, etc.)	35	19%
More recreation areas	21	11%
Jobs (w/good wages)	20	11%
Activities and programs for children and youth	14	8%
Public golf course	12	6%
Industry, manufacturing	11	6%
Swimming pool	9	5%
Nothing is missing	7	4%
Timber industry/management	6	3%
Culture, entertainment	6	3%
Medical facility/health care	5	2%
Tourism, visitor activity	5	2%
Values (respect, honor, trust)	3	2%
Continuing education	3	2%
Reasonable prices	3	2%
Better buildings, equipment for students	3	2%
Radio station	2	1%
Cooperation among towns	2	1%
Old “small town” atmosphere	2	1%
Land-use planning	2	1%
Airport expansion/aviation fuel available	2	1%
Street/Road maintenance	1	<1%
Wildlife/Wildlife protection	1	<1%
Active organizations	1	<1%
Restoration, preservation of buildings	1	<1%
Convention center	1	<1%
Native American interest	1	<1%
Theme park	1	<1%
Cleanliness	1	<1%
Working farm, dude ranch	1	<1%
Assistance for needy/low-income housing	1	<1%
Freedom from outside influence, management	1	<1%
Longer hunting season	1	<1%
Landscaping	1	<1%
Rest stops	1	<1%
Bull trout fishing	1	<1%
Winter recreation/tourism	1	<1%
Bypass	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.

Strengths and Weaknesses of the Tobacco Valley as a Tourist Destination

Tobacco Valley residents were asked to identify what they feel are the strengths and weaknesses of the Valley as a tourist destination (Tables 32 and 33).

Strengths of the Tobacco Valley as a Tourist Destination: Twenty-eight percent of respondents felt that the Tobacco Valley's numerous recreation opportunities are the areas strongest asset, followed by the scenery/wildlife/open space (25%) and the area's lakes and dams (12%).

Table 32: Strengths of the Tobacco Valley as a Tourist Destination

Characteristics	Number of Responses*	Percent of Responses**
Recreation opportunities	69	28%
Scenery/Wildlife/Open space	61	25%
Lakes, dams	30	12%
Friendly people	23	9%
No strengths	14	6%
Kootenai National Forest	11	5%
Low population/Quiet	9	4%
Proximity to Canada	6	2%
Clean water, air	4	2%
Location on Hwy 93	4	2%
Proximity to Glacier National Park	3	1%
Heritage preservation/History	3	1%
Gift stores, shopping	3	1%
Desirable for relocating to	1	<1%
Good climate	1	<1%
Little tourism	1	<1%
Christmas trees	1	<1%
Events and activities year-round	1	<1%
Guest ranches	1	<1%
Fair	1	<1%
Casinos	1	<1%
Safety	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.

Weaknesses of the Tobacco Valley as a Tourist Destination: Topping the list of what are perceived to be weaknesses of the Tobacco Valley as a tourist destination, is the current lack of hotels and restaurants, with 27 percent of respondents identifying it as a problem. Twelve percent feel the area's lack of entertainment is a hindrance, followed by 9 percent who feel the lack of shopping opportunities presents a problem.

Table 33: Weaknesses of the Tobacco Valley as a Tourist Destination

Characteristics	Number of Responses*	Percent of Responses**
Lack of hotels, restaurants	46	27%
Limited entertainment (culture, activities)	20	12%
Lack of shopping	16	9%
Location (limited access)	14	8%
Unfriendly people (esp. towards tourists)	11	7%
No weaknesses	9	5%
No points of interest	8	5%
Not advertised enough	6	3%
No golf course	5	3%
Lack of ski hill/winter recreation	5	3%
Run-down, poor appearance	5	3%
Excess of recreationists/crowds that ruin experience	4	2%
No indoor pool	3	2%
No visitor information center	2	1%
Small RV/camping areas	2	1%
Lack of jobs	2	1%
Prices	1	<1%
Weather	1	<1%
Mobile homes	1	<1%
Insufficient infrastructure	1	<1%
No sales place for arts and crafts	1	<1%
Traffic	1	<1%
Short business hours	1	<1%
Local government	1	<1%
Too small	1	<1%
Bears	1	<1%
No meeting facilities	1	<1%
Poor forest management	1	<1%
Pollution	1	<1%
Medical services	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.

Marketing the Tobacco Valley as a Tourist Destination

Survey recipients were asked to suggest ways in which the Tobacco Valley could be better marketed as a tourist destination. This was an open-ended question as well, allowing for the free flow of ideas from respondents (Table 34).

Twenty-two percent of respondents felt that focusing on the Tobacco Valley's outdoor recreation opportunities would be the best option in improving marketing of the area. Another 10 percent suggested that the scenic beauty of the Valley would offer the best opportunities, while 8 percent thought it a good idea to advertise more nationally.

Table 34: Marketing the Tobacco Valley as a Tourist Destination

Characteristics	Number of Responses*	Percent of Responses**
Focus on outdoor recreation opportunities	24	22%
Focus on scenic beauty	11	10%
Advertise more nationally	8	8%
Advertise (TV, radio, newspapers, etc.)	7	7%
Focus on artisans, crafts people, musicians	6	6%
Build a golf course	6	6%
Use the Internet	5	5%
Focus on the residents	5	5%
Focus on rural character	4	4%
Expand existing services	4	4%
Special events year -round	4	4%
Focus on proximity to Canada	3	3%
Focus on Lake Kooconusa	2	2%
Focus on the natural resources	2	2%
Focus on proximity to Glacier National Park	2	2%
Focus on proximity to Whitefish, Flathead Lake and Missoula	2	2%
Market as "Last Best Place"	1	<1%
Focus on Amish village	1	<1%
Focus on proximity to Fernie ski area	1	<1%
Make restaurants smoke -free	1	<1%
Build a water park	1	<1%
Arrange rodeos	1	<1%
Publish calendar of events	1	<1%
Build amusement park	1	<1%
Build petting zoo	1	<1%
Focus on Native American history	1	<1%
Make Ten Lakes a National Recreation Area	1	<1%
Clean up	1	<1%
Use a catchy name	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.

Expanding the Success of Existing Tobacco Valley Events

A possible strategy for the Tobacco Valley would be to expand on already successful events rather than establish new ones. When survey recipients were asked to suggest ways in which this could be done, 24 percent indicated that expanding the events themselves, as well as associated facilities, would be the best idea. Twenty-one percent suggested more advertising, while 16 percent felt that nothing should or could be done to expand on existing success. Ten percent indicated that improving the quality of events, while ensuring their authenticity would be the best solution (Table 35).

Table 35: Expanding the Success of Existing Tobacco Valley Events

Characteristics	Number of Responses*	Percent of Responses**
Expanding events, facilities (seating, parking, etc.)	33	24%
More advertising	29	21%
Nothing	22	16%
Improve quality/keep genuine	14	10%
More broad-based participation in planning/Less bureaucracy	7	5%
Bring in celebrities	5	4%
Make events more family friendly (limit smoking, drinking)	4	3%
Relax rules, law enforcement	3	2%
Coordinate with and include nearby towns	3	2%
Have fair rides	3	2%
Arrange tours, package deals	2	1%
Keep prices low	2	1%
Move Rendez-Vous to later in spring	2	1%
More camping areas	1	<1%
More gift shops	1	<1%
Give town "Old West" look	1	<1%
Arrange transit system/shuttle	1	<1%
Advertise as cultural opportunities	1	<1%
Get media to cover events	1	<1%
Have Rendez-Vous in September	1	<1%
Increase purses (to make participation worth while)	1	<1%
Centralize location	1	<1%
Have more events on Sundays	1	<1%
Involve Native Americans and their culture	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.

Features with Potential to Attract Visitors to the Tobacco Valley and Keep Them Coming Back

From a list of five prominent Tobacco Valley features, respondents were asked to identify which ones, if any, they felt have the potential for attracting visitors to the area and keep them coming back. Space was provided for respondents to write in their own suggestions as well (Table 36).

Tobacco Valley respondents have faith in most of the features of their community to attract both first-time and repeat visitors. Sixty-eight percent thinks that Kootenai National Forest has this draw, followed by the Ten Lakes area (62%), local rodeos, fairs and special events (58%), Libby Dam/Lake Koocanusa (57%) and various historic attractions (38%). Write-in suggestions included recreation/open space/trails, with 9 mentions, and friendly people, with 3 mentions.

Table 36: Tobacco Valley Attracting Features

Characteristics	Percent of Responses*
Kootenai National Forest amenities	68%
Ten Lakes scenic area	62%
Rodeo/Fair/Special Events	58%
Libby Dam/Koocanusa Lake and amenities	57%
Historic attractions	38%
Other:	19%
Recreation/Open space/Trails	9
Friendly people	3
Dude ranches	2
18-hole golf course	2
Historical appearance of Eureka	2
Artists	1
Cleanliness	1
Lakes	1
Stone Hill rock climbing area	1
Fair	1
Dunes at Lake Koocanusa	1
Tow saw mill	1
Activities for kids	1
Glacier National Park	1
Riding Area	1

* Respondents could offer more than one suggestion.

Where Tobacco Valley 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 gather ideas to that end, one survey question asked respondents where they take people who come to visit. Respondents were not limited to any one type of attraction or specific location. The High Country Lakes and more specifically the Ten Lakes area were by far the most popular destination (21%), followed by Lake Koocanusa (14%) and the area's waterfalls (6%) (Table 37).

Table 37: Attractions Visited by Residents and Visitors

Attractions	Number of Respondents*	Percent of Responses**
High Country lakes/Ten Lakes area	62	21%
Lake Koocanusa	41	14%
Waterfalls (Pinkham, Sunday, North Fork/Big Creek)	17	6%
Other lakes (Dickey, Murphy, Sophie, Sapphire, Glen)	15	5%
National Forest/woods	15	5%
Canadian border	15	5%
Casinos/bars	14	5%
Eureka town	13	4%
Eureka historic village	12	4%
Back roads	11	4%
Lookouts (Stahl, Marston, Maguire, Black Butte)	10	3%
Shopping	6	2%
Graves Creek	6	2%
Special events	5	2%
Fish hatchery/fishing	5	2%
Rivers	4	1%
Historic attractions	4	1%
Restaurants	3	1%
Camping	3	1%
Mountains	2	<1%
Hiking trails	2	<1%
Crow's Nest Pass	1	<1%
Railroad tunnel (Trego)	1	<1%
Plum Creek sawmill (Fortine)	1	<1%
Bowling	1	<1%
Church	1	<1%
Horseback riding	1	<1%
The Drumlins	1	<1%
Elk farm/ranch	1	<1%
Peaceful Gorge	1	<1%
Llama farm	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.

Additional Safety Infrastructure Needed if Tourism Were to Increase in the Tobacco Valley

In an effort to identify short-comings in the Tobacco Valley's emergency infrastructure, respondents were asked to identify improvements they feel needed to be made should tourism increase in the area. Medical and other emergency services were foremost in the minds of 28 percent of respondents, while 27 percent felt that road safety, especially at intersections, is of primary importance. Twenty-one percent see a need for more law enforcement, while 11 percent would favor a highway bypass (Table 38).

Table 38: Additional Safety Infrastructure Needed

	Number of Respondents*	Percent of Responses**
Medical/emergency services	44	28%
Road/intersection safety	43	27%
Law enforcement	33	21%
Highway bypass	16	11%
Parking	7	5%
Pedestrian safety	2	1%
Helipad	2	1%
Cellular service	1	<1%
Auto services	1	<1%
Wastewater treatment plant	1	<1%
Drinking fountains	1	<1%
Public toilets	1	<1%
Road improvements	1	<1%
Highway signage	1	<1%
Airport	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.

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 39 and 40).

Tobacco Valley: The top advantage of tourism as identified by Tobacco Valley respondents was increased revenue for community businesses. Thirty-seven percent of respondents indicated higher income and higher revenues for local businesses as the top advantages followed by job opportunities (22%). Nineteen percent indicated that they feel there are no advantages to increased tourism in the area.

In terms of disadvantages, 21 percent identified more people as the chief problem caused by tourism growth, followed by traffic (19%) and crime and drug use (13%).

Table 39: Advantages Associated with Increased Tourism

	Tobacco Valley *	
	Number of Responses*	Percent of Responses**
Increased revenue for community businesses	55	37%
Job opportunities	34	22%
No advantages	29	19%
New/improving stores and businesses	22	14%
Diversified economy	4	3%
Increased quality of life	3	2%
New people	3	2%
More activities	1	<1%
New industry	1	<1%
Healthier infrastructure	1	<1%
Higher wages	1	<1%
More culture	1	<1%

* Respondents could offer more than one suggestion.

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

Table 40: Disadvantages Associated with Increased Tourism

	Tobacco Valley	
	Number of Responses*	Percent of Responses**
More people/crowding	41	21%
Traffic problems, accidents	37	19%
Crime, drugs	26	13%
Decreased quality of life	14	7%
Tourists purchasing land, moving here	11	6%
No disadvantages	10	5%
Seasonal, low-wage jobs	8	4%
Higher prices	6	3%
Pollution, trash	6	3%
Higher taxes/Increased tax burden	5	3%
Stress on infrastructure	4	2%
No help from a sales tax	4	2%
Few people benefit	4	2%
Rude people	3	1%
Too many changes	3	1%
Increased restrictions, less freedom	3	1%
Lack of facilities, services	2	1%
No timber sales	1	<1%
Gaudy establishments/chain stores and restaurants	1	<1%

* Respondents could offer more than one suggestion.

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

General Comments

Respondents were provided with space at the end of the survey form to include their own thoughts and comments. This was an open-ended format with no guidelines as to the topic of the comments, and thus they deal with a wide variety of issues. Unfortunately, there is little consensus among them (Table 41). For a list of comments cited verbatim, please see appendix B.

Table 41: General Comments by Tobacco Valley Respondents

	Count
General pro-tourism	6
Tourism brings disrespect for/destruction of nature	4
Tourists become residents	4
Tourism promotes greed	3
Scenic and recreation areas attract tourists	3
New people want to change things	3
Keep open space undeveloped	2
Tourism offers false promises	2
Need a sales tax	2
Lack of trust in government (will limit recreation opportunities)	2
Tourism cannot support a family year-round	2
Tourism increases cost of living, driving out Montanans	2
The Tobacco Valley needs a big attraction	1
Tourism is a "clean" industry	1
Natural resource industry keeps the area going	1
Tourism welcome as an industry during tourist season	1
No need for more part-time, low-wage jobs	1
Tourists will ruin our state	1
Take care of residents before you take care of tourists	1
Tourists cost Montana money (road repair, etc.)	1
Tourism will fill in what forestry and agriculture have left	1
Enjoy the slow pace	1

Appendix A: Tobacco Valley Survey Instrument

Please include any additional comments below:

Resident Attitudes Toward Tourism in the Tobacco Valley



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

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

1. How much contact do you have with tourists visiting the Tobacco Valley? Please? your answer.

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

2. Which of the following statements best describes your behavior toward tourists in the Tobacco Valley? Please? your answer.

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

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

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

4. Compared to other industries, how important a role do you think tourism should have in the Tobacco Valley? Please? your answer.

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

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

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

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

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

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

- Too fast
- About right
- Too slow

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

1. What characteristic of the Tobacco Valley do you value and would like to see continued into the future?

2. What characteristic of the Tobacco Valley would you prefer not to see continued into the future?

3. What is missing from the Tobacco Valley that you would like to see in the future?

4. What are the strengths of the Tobacco Valley as a tourist destination?

5. What are the weaknesses of the Tobacco Valley as a tourist destination?

6. How could we market the Tobacco Valley as a tourist destination?

7. What should we do to expand the success of existing Tobacco Valley events (i.e. the Rodeo, the Bull Thing, the Rendez-vous)?

8. Which of the following features have the greatest potential to attract visitors to the Tobacco Valley and keep them coming back? Please check all that apply.

- Historic attractions
- Ten Lakes scenic area
- Libby Dam/Koocanusa Lake and amenities
- Rodeo/Fair/Special events
- Kootenai National Forest amenities
(rental cabins, lookouts, hiking trails, swimming areas, etc.)
- Other _____
(please specify)

9. Where in the Tobacco Valley do you take family and friends that come to visit? Please list up to three items.

1. _____
2. _____
3. _____

10. If tourism were to increase in the Tobacco Valley, what additional safety infrastructure would become necessary (e.g. traffic lights, emergency services)?

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 the Tobacco Valley. 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 the Tobacco Valley. 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 the Tobacco Valley and in the state of Montana. Please circle your answers.

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

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

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 the Tobacco Valley? _____ years in the Tobacco Valley

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 ? your answer.

() 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. Use a check mark (?) to indicate your answers.

- | | | |
|-----------------------------------|--------------------|--|
| () 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) | | |

Appendix B: Verbatim Tobacco Valley Comments

The following are comments taken from the back page of the Tobacco Valley Resident Attitude Survey. The comments are given verbatim with no corrections or interpretations made. Due to indecipherable handwriting, parts of some comments cannot be interpreted. These sections have been left out of this transcript and replaced here by underscores (_____) to indicate where something is missing.

- Lumber, agriculture, mining is what keeps this area going. Tourism would be welcomed as another industry during the tourist season.
- Time and money spent would be better spent on encouraging a 12 month industry rather than 4 month tourism.
- Tourists will ruin our state. I feel this survey was a waste of my time. You people want tourists here and this survey is just a fake concern of how some of us feel. Your probably an environmental group in secret. Sierra Club? Yup. Lets get more out of staters here and bring there big bucks to spend and run out native Montanans so they can't afford to live here anymore, because the cost of living went up so high. Please do not waste any more of my time with these surveys!
- Tourists should help pay, we need a sales tax.
- Recreation opportunities will be limited by Federal Agencies. Lake Kocanusa by US Fish & Wildlife and COE drawdowns. (Not scientific just opinion). The Forest Service closing and obliterating roads, the constant fight for snowmobiling in 10 Lakes. The Corp of Engineers lied to the people of Tobacco Valley during construction of Libby Dam. The promised golf course was never considered after dam was approved. Water recreation has been dismal because of summer drawdowns. Government agencies are generally not trusted in Tobacco Valley.
- Gov't can do little to help an economy, but can do much to hurt it. We have our forest shut down by classroom theory for wolves to bears, and trees that will either be logged or burned where they stand. And blackened forests will destroy our economy of tourism more than and grant dollars can compensate for. To lock off our forest roads to berry and mushroom gathering, to make our people dependent on outside productive economies is reducing Montana to the level of a damn reservation—ready to do a powwow and dance for the tourist hand out.
- I lived in a high traffic area for 20 years and just moved back. I love it
- Please consider all the effects more people to our valley will have on Eureka, if you wanted to live in a place with more people around you wouldn't live here. We live here because we like it the way it is. Why run out the natives to replace them with tourists? People who don't care and love our area as we do. If you want to live in a tourist town, move to Whitefish!
- Undeveloped open space should remain as is—no golf courses, no theme parks, no shopping malls, etc. Utilize the scenic and rec. areas we now have. This is why people who come thru like the area. Take that away and we lose the very thing people like, the undeveloped open space and wilderness areas and Kocanusa area.
- Preference—Industries move in, some tourism is okay, but it doesn't feed a family year-round nor put a roof over heads. Tourism is part-time and minimum wage pay. We don't need any more of that.
- If we had sales tax instead of property tax every one would pay their fair share. It really puts a burden for the people who own property. My husband and I are on SS and pay \$100 into taxes per month. We need a tax break for sure and a state sales tax would take some of the burden off of us.
- On the whole, I think increased tourism in our valley would be beneficial. There are naturally disadvantages too; too many people at special places, etc.
- Look at the towns that have been marketed—Sedona, Telluride, Whitefish to name a few—more people, more money, less charm, less warmth. Let the nature of Eureka be its drawing power. It doesn't have a lot of conveniences. If that's what you want, then go somewhere else.
- I believe tourism is a poor excuse for families who have worked in the woods for their livelihood—two motel maid jobs (husband and wife) can't let a family survive and perhaps if the U of M didn't continue to turn out people who believe that nature can be preserved in a plastic bag we could continue to manage our lands and give dignity back to the Tobacco Valley.
- The problem, in a nutshell, is that tourists come to the Tobacco Valley (TV) to enjoy the very things that their presence, in increasing numbers, destroys. While the apparent positive side is the increase in jobs and income, the price for them is a cluttered, crowded Valley with less openness, freedom of access and a restructured lifestyle. Moreover, as tourism is dependent on factors way out of local control (e.g. 9/11, oil prices, style, national economy, etc.), tourism dependent economies always ride a wild rollercoaster of ups and downs. Finally, since access to wild and scenic areas seem to be the

main draw of the TV, it should be noted that while the bodies may pour in to fill the mountains, river, lakes and forests, those seeking “wilderness experiences” spend minimal amounts of money in the community. They come to the community to access the open spaces; thus, the community and its goods/services receive limited economic benefit. This, again, creates a situation in which the virtues of the community are sacrificed to the false idols of jobs and greater income.

- The Tobacco Valley community is a beautiful area. We discovered it more than 20 years ago and fell in love with Eureka. However, it is one of the poorest areas and counties in Montana. With the closing of many of the mills and the decline in logging and wood products we need to be open-minded about other opportunities for industry. The tourism industry is one of the most cleanest industries available. We certainly don't want to pollute our skies or our waters. Our location is prime for such an industry. We need to promote jobs and income in this area. We need for our children to have a future to look forward to economically locally.
- I feel that if I want to continue living in the TV, I need to be open to tourism or whatever else may help our community grow.
- Montanan's are extremely rude to outsiders unless they are making money off them. I've heard them talking among themselves, in public places. It's like “come”, spend your money and leave! We both worked for amusement parks for 15 years and loved it. We met a lot of wonderful people. It generates both enjoyment for guests and income and perks for the employees. This town is dying and fast! All the younger generation is going to really be in trouble without jobs. Not everyone wants to work in the mills!!!
- One of the major disadvantages of increased tourism is that often times, tourists become residents who want to change MT to ways they became used to from wherever they came.
- MT should worry about taking care of people here instead of trying to bring in more tourists. No tourists, less road repair. Would save MT money.
- Other places in Montana that have been duped into thinking tourism is the answer are paying for their mistake. The real wealth of any nation or state is its natural resources. People feel the best about what they do when they are involved in a business or industry that provides an essential product or service to other people.
- There are very few real beautiful places left in the Rock Mt chain. The valley happens to be one—all the other that I have travel to took like they come out of the same model. The cutesy McDonalds etc. every thing is fake. Lots of business are absentee owner. Taxes go sky high to accommodate road improvements sidewalks etc. sewer districts etc. The bottom line is mostly the locals pay the bills—the outside investor _____ the money. I'm a business person. I can tell you how there are millions of Texas and Midwest moneys viewing for vast tracts of land here because of the valley charm. That money is bottom line—and is tied into White Fish realstate. I have pulled out—I think tourism that would _____ take in the valley assets and fight to save them would be great. But I also know through people like you the bottom line will win. It would make me very rich—but not happy.
- I have mixed feelings about tourism. We moved to MT because too many big city types were moving to our area and changing our life style by demanding services they left. Paradox: They want to move here because of our laid-back lifestyle and then they want to change it to what they left when they get here! I'm pro-tourism in the idea of a low-impact industry that brings a chance to stabilize our population economically without much damage to what we hold dear.
- I think tourism has the most potential of increasing jobs and revenue over all in the Tobacco Valley. Forestry and ranching have suffered several setbacks over the last few years and I believe tourism could take up the slack.
- Disrespect for our land, water are what comes with tourism. Trashed out camp grounds and trails, backroads crawling with people unable to help themselves out of a jam. Trespassing disrespectfully. Tourism promotes greed.
- I'm employed by Big Mtn ski resort in Whitefish. Tourism is our bread and butter. If the Tobacco Valley had an attraction like that we would definitely improve our status. Big Mtn employs about 100 FTYR employees and over 300 FT seasonal in winter. Winter around here is when most are unemployed. I'd rather work closer to home. I'd prefer if my husband found work in the area as well.