

Institute for Tourism and Recreation Research

Exploring Tourism Development Potential: Resident Attitudes in Meagher County, MT

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Executive Summary

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

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

NONRESIDENT VISITORS:

- In 2001, over 3.9 million travel groups visited Montana. Of those, approximately 118,000 (3%) passed through Meagher County.
- Over \$1.7 billion was spent statewide in 2001 by nonresident travelers. This figure amounts to approximately \$1,894 for every Montana resident.
- In Meagher County, nonresident visitors spent close to \$1.55 million, or about \$871 per county resident.
- Travelers to Meagher County stayed in the state twice as long as statewide visitors.
- Travelers to Meagher County reported that the best sources of travel information while in Montana were the people in visitor information centers.
- Seventy percent of Meagher County visitors were in Montana primarily for vacation, and 29 percent were in the state mainly because they were passing through on their way to somewhere else.
- Vacationers in Meagher County were attracted to Montana primarily because of the mountains.
- Visitors to Meagher County spent more of their money on retail than on any other expenditure category.
- Meagher County visitors traveled as families, by themselves or as couples in almost equal measure.
- Overnight visitors to Meagher County were more likely than statewide visitors to stay in public or undeveloped campgrounds, but less likely to stay in a hotel/motel or with friends/relatives.

RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:

- Respondents from Meagher County have resided in their community and in the state for a longer time than the statewide sample.
- Almost two-thirds of the Meagher County sample are native Montanans.
- The majority of Meagher County respondents feel tourism should have a role equal to other industries in the local economy, and ranked the tourism and recreation industry 4th on a list of desired economic development options.
- Most Meagher County respondents work in places that supply little or none of their products or services to tourists or tourist businesses.
- Statewide respondents have a stronger attachment to their community than do Meagher County respondents, while the latter are slightly concerned about the future of their community.
- Forty-six percent of Meagher County respondents feel that the population in the area is not changing.
- Meagher County respondents feel their quality of life can be enhanced by improving the condition of job opportunities, as well as road conditions, cost of living, and overall cleanliness and appearance.
- Meagher County respondents largely agree that tourism will have a positive influence on museums and cultural centers, job opportunities, and parks and recreation areas.
- The respondents of Meagher County are generally supportive of tourism development, more so than the statewide sample. Although few feel they will benefit personally from tourism, they agree that it will improve the quality of life for people in Montana.
- Seventy-five percent of Meagher County respondents would support land-use regulation to control the type of future development in their community.

- Meagher County respondents think there is adequate undeveloped open space in the county, but are still concerned about its possible disappearance.
- Respondents feel strongly that any decision about tourism development should involve local residents and not be left entirely to the private sector.
- Overall economic benefit is perceived as the primary advantage of increased tourism in Meagher County, while more people, crime, and litter are seen as the leading disadvantages.

CONCERNS OF MEAGHER COUNTY RESIDENTS:

- Meagher County residents value the friendliness and closeness of their community, along with its rural character and associated open space.
- Negative attitudes and gossip are among the most unwanted aspect of Meagher County community life, with drug and alcohol use following close behind.
- Meagher County residents would like to see economic improvement in their community as well as more restaurants and an athletic facility.
- Residents identify the Castle Museum as the county's most prominent tourist attraction closely followed by hunting and fishing opportunities and the hot springs.
- Increased advertising, especially over the Internet is thought to be a good way for Meagher County to market itself as a tourist destination. Some also feel that the County should focus on scenery and the outdoors.
- To encourage greater use of Highway 89 through Meagher County, the shortest road between Glacier and Yellowstone national parks, many suggest improving the highway itself, while others encourage increased advertising and emphasis on the fact that Highway 89 is the scenic route between the two parks.
- The need for city clean-up is what residents feel first-time visitors will notice first when coming to their county. Others feel that visitors will notice the small and secluded character of the area along with the landscape and scenery. Some also think that what visitors will notice first is the dying and depressed character of the town.
- In terms of infrastructure improvements in Meagher County, most respondents think the city appearance should be addressed while close to half want more restaurants and almost as many see the need for highway improvements.
- The need for more eating establishments surfaces again when residents were asked what additional businesses and services they would like to see in Meagher County. A large portion of respondents would also like to see gift shops and more camping areas.
- Thirty-five percent of respondents stated that they are willing to donate their time to participate in tourism development and promotion.

Introduction

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

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

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

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

Section 1: The Nonresident Travel Study

Methodology

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

Data was obtained through a mail-back diary questionnaire administered to a sample of intercepted travelers in the state. During the four-month study period, 12,941 groups were contacted. Usable questionnaires were returned by 5,800 groups, resulting in a response rate of 45 percent. A sample of 193 respondent groups traveled through Meagher County in the summer of 1996 (Table 1).

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

| | |
|---|--------|
| Nonresident groups contacted | 12,941 |
| Usable questionnaires returned | 5,800 |
| Nonresident Travel Study response rate | 45% |
| Meagher County sample size | 193 |
| Meagher County as percent of nonresident sample | 3% |

A Profile of Current Summer Visitors

ITRR nonresident travel estimates report that approximately 2,267,000 groups, averaging 2.6 people per group, visited Montana during the 2001 summer season². It was estimated that 3 percent, or 68,000 of those groups passed through Meagher County, and that 11 percent of those who traveled through spent at least one night there.

Group Characteristics

Travel group characteristics for Meagher 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 Meagher County and the statewide sample (Table 2). However, the small sample size of 22 for overnight visitors to Meagher County makes it difficult to generalize the data.

Meagher County: The average group size for Montana visitors who spent at least one night in Meagher County was 2.8. A full 46 percent of travelers had visited Montana before this trip. Close to one-third of summer visitors to Meagher County traveled with family (29%), while almost as many traveled alone and as couples (27% each). The largest portion of males were between 35 and 54 years of age (34%), as was the largest portion of females (44%). The majority of summer visitors chose to spend their nights in a public campground (59%), and stayed an average of 7.1 nights in Montana.

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

The subset of people visiting Meagher County seems quite different from Montana visitors in general. Not only does Meagher County attract more first-time visitors than the state as a whole, visitors to the county also tend to stay much longer in the state. This corresponds to the data reported in Table 9, that the Meagher County visitor population is on vacation and not just passing through the state. What is more, visitors to the county are campers to a larger extent than statewide visitors (95% vs. 38%).

Statewide: For travelers to the state, the average group size was 2.6, a fraction smaller than for Meagher County visitors. Seventy-seven percent were repeat visitors, and most traveled as couples (38%), with almost as many traveling as family (34%). The largest portion of the statewide male visitor population was between 35 and 54 years of age (36%), as was the case for females (38%). A typical visitor to Montana spent 3.5 nights in the state, and was most likely to stay in a hotel/motel (59%).

Table 2: Characteristics of Nonresident Summer Visitors

| | Meagher County* | Statewide |
|----------------------------------|-----------------|-----------|
| Group Type | | |
| Family | 29% | 34% |
| Alone | 27% | 17% |
| Couple | 27% | 38% |
| Friends | 13% | 7% |
| Business associates | 4% | 1% |
| Family & friends | – | 3% |
| Group or club | – | – |
| Group Size | 2.8 | 2.6 |
| Have previously visited Montana | 46% | 77% |
| Nights spent in Montana | 7.1 | 3.5 |
| Accommodations used in Montana** | | |
| Home of friend or relative | 12% | 21% |
| Hotel or motel | 41% | 59% |
| Private campground | 12% | 18% |
| Public campground | 59% | 16% |
| Undeveloped campground | 24% | 4% |
| Resort or guest ranch | 12% | 5% |
| Condominium | – | 1% |
| Other | 12% | 5% |
| Age of Males | 16% | 17% |
| Age 0 to 24 | 22% | 10% |
| Age 25 to 34 | 35% | 36% |
| Age 35 to 54 | 24% | 18% |
| Age 55 to 64 | 3% | 19% |
| Age 65 and older | | |
| Age of Females | | |
| Age 0 to 24 | 18% | 17% |
| Age 25 to 34 | 14% | 11% |
| Age 35 to 54 | 44% | 38% |
| Age 55 to 64 | 24% | 19% |
| Age 65 and older | – | 15% |

Source: ITRR

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

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

Visitors to the state as well as to Meagher County were from a variety of origins. However, as mentioned above, the Meagher County sample was too small for any frequency of origin to be computed. In the statewide sample, the most common origin was Washington, followed closely by California and Idaho (Table 3).

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

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

Source: ITRR

* 1=highest frequency

** Characteristics of Montana visitors who stayed at least one night in Meagher 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 11 information sources was included in the questionnaire (Tables 4, 5, 6 and 7).

Meagher County: Twenty-one percent of visitors to Meagher County did not use any of the listed sources prior to their trip. The three most frequently used sources of travel information were National Park brochures (46%), the Montana Travel Planner (32%), and the travel guide books (26%). The *most useful* sources of travel information used prior to arriving in Montana were also the Montana Travel Planner (38%), travel guide books (19%) and National Park brochures (17%).

Statewide: Thirty-one percent of the state sample used AAA as a pre-trip information source, while 22 percent used travel guide books and 21 percent used National Park brochures. The *most useful* sources of information used prior to travel included AAA (38%), travel guide books (19%) and the Montana Travel Planner (12%).

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

| | Meagher County* | Statewide* |
|-------------------------------------|-----------------|------------|
| National Park brochure | 46% | 21% |
| Montana Travel Planner | 32% | 13% |
| Travel guide book | 26% | 22% |
| Information from private businesses | 22% | 7% |
| AAA | 21% | 31% |
| Internet travel information | 9% | 5% |
| State Park brochure | 6% | 4% |
| 1-800 State travel number | 4% | 7% |
| Chamber or visitor bureau | -- | 7% |
| Regional travel number | -- | <1% |
| Attending travel trade show | -- | <1% |
| <i>None of these sources</i> | 21% | 39% |

Source: ITRR

* Visitors could indicate more than one information source.

Table 5: Most Useful Source of Information Used Prior to Visit to Montana

| | Meagher County* | Statewide* |
|-------------------------------------|--------------------|------------|
| Montana Travel Planner | 38% | 12% |
| Travel guide book | 19% | 19% |
| National Park brochure | 17% | 10% |
| AAA | 16% | 38% |
| Information from private businesses | 10% | 5% |
| Chamber or visitor bureau | -- | 5% |
| 1-800 State travel number | -- | 4% |
| State Park brochure | -- | 1% |
| Internet travel information | -- | 3% |
| Attending travel trade show | -- | <1% |
| Regional travel number | -- | <1% |

Source: ITRR

* Percentages may not add to 100 due to rounding.

Meagher County: Visitors were also asked where they received travel information while *in* Montana. For overnight visitors to Meagher County, the travel information sources used the most frequently were persons in motels, restaurants, gas stations, etc. (52%), persons in visitor information centers (33%) and brochure racks (31%). Visitors then indicated what source was the *most* useful while traveling *in* Montana. Thirty-five percent of respondents stated that persons in visitor information centers were the most helpful, followed by persons in motels, restaurants, gas station, etc. (27%).

Statewide: Thirty-six percent of statewide visitors indicated that while *in* Montana, they obtained travel information from persons in motels, restaurants, gas stations, etc, as well as from highway information signs (36%). Other prominent information sources were brochure racks (33%) and people in visitor information centers (27%). Of the information sources used while *in* Montana, statewide visitors indicated that the *most* useful were persons in motels, restaurants, gas stations, etc. (23%), as well as persons in visitor information centers (23%).

Table 6: Sources of Information Used While *in* Montana

| | Meagher County* | Statewide* |
|--|--------------------|------------|
| Person in motel, restaurant, gas station, etc. | 52% | 36% |
| Person in visitor information center | 33% | 27% |
| Brochure rack | 31% | 33% |
| Other | 25% | 18% |
| Highway information signs | 23% | 36% |
| Business billboards | 9% | 10% |
| Computer touch-screen info center | -- | <1% |
| <i>None of these sources</i> | 13% | 23% |

Source: ITRR

*Visitors could indicate more than one information source.

Table 7: Most Useful Source of Information Used While in Montana

| | Meagher County* | Statewide* |
|--|-----------------|------------|
| Person in visitor information center | 35% | 23% |
| Person in motel, restaurant, gas station, etc. | 27% | 23% |
| Brochure rack | 20% | 15% |
| Other | 14% | 18% |
| Highway information signs | 4% | 19% |
| Business billboards | -- | 2% |
| Computer touch-screen info center | -- | -- |

Source: ITRR

*Percentages may not add to 100 due to rounding.

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 8).

Meagher County: Ninety-six percent of Meagher County visitors indicated that vacation was one reason for traveling to Montana. Other frequently cited reasons included passing through the state (27%) and visiting family or friends (23%).

With respect to Meagher County overnight visitors' *primary* reason for visiting the state, over three quarters (79%) were in Montana on vacation. The next likely *primary* reason was being on their way to somewhere else, i.e. just passing through but that was a mere 9 percent.

Statewide: Over three-fourths of statewide visitors cited vacation as one reason for their trip to Montana. Also frequently mentioned were visiting family/friends and passing through (31% each).

Statewide travelers most frequently cited that vacation was their *primary* reason for visiting Montana (49%). Passing through the state (21%) and visiting family or friends (16%) were also indicated as *primary* reasons.

Table 8: Reasons for Traveling to Montana

| | Meagher County | | Statewide | |
|-------------------------|----------------|------------------|--------------|------------------|
| | All Reasons* | Primary Reason** | All Reasons* | Primary Reason** |
| Vacation | 96% | 79% | 77% | 49% |
| Passing through | 27% | 9% | 31% | 21% |
| Visit family or friends | 23% | 3% | 31% | 16% |
| Other | 6% | 4% | 4% | 3% |
| Business | 4% | -- | 10% | 6% |
| Convention or meeting | 4% | 4% | 3% | 2% |
| Recreational shopping | -- | -- | 9% | 1% |
| Necessity shopping | -- | -- | 4% | 1% |
| Medical | -- | -- | 2% | 1% |

Source: ITRR

* Visitors could indicate more than one reason.

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

Montana Attractions

Respondents who indicated that one purpose for their trip was vacation were asked what attracted them to Montana as a vacation destination. They were asked to check *all* pertinent attractions, and then indicate one *primary* attraction (Table 9).

Meagher County: Many Meagher County vacationers were attracted by more than one of the state's many features. The top five Montana attractions were the mountains (93%), Yellowstone National Park (76%), uncrowded areas (61%), Glacier National Park (57%), and rivers (55%). Glacier National Park (33%) was the most popular *primary* attraction for Meagher County overnight visitors, followed by the mountains (21%), special attractions(11%) and Yellowstone National Park (10%).

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

Table 9: Attractions of Montana as a Vacation Destination

| | Meagher County | | Statewide | |
|---------------------------|----------------|----------------------|--------------|----------------------|
| | Attractions* | Primary Attraction** | Attractions* | Primary Attraction** |
| Mountains | 93% | 21% | 51% | 12% |
| Yellowstone National Park | 76% | 10% | 39% | 21% |
| Uncrowded areas | 61% | -- | 27% | 4% |
| Glacier National Park | 57% | 33% | 31% | 24% |
| Rivers | 55% | 4% | 35% | 1% |
| Open Space | 49% | 9% | 31% | 6% |
| Camping | 48% | -- | 19% | 2% |
| National forests | 42% | -- | 15% | 1% |
| Friendly people | 33% | -- | 18% | 3% |
| Wildlife viewing | 32% | 10% | 28% | 2% |
| Historic sites | 29% | -- | 13% | 2% |
| Native American Culture | 25% | -- | 10% | 1% |
| Lakes | 24% | -- | 26% | 1% |
| Montana history | 18% | -- | 11% | 1% |
| Badlands | 17% | -- | 6% | 1% |
| Hiking | 14% | 2% | 15% | 1% |
| Fishing | 13% | -- | 14% | 6% |
| Special attractions | 12% | 11% | 8% | 6% |
| Wilderness areas | 12% | -- | 5% | 1% |
| State parks | 11% | -- | 6% | -- |
| Northern Great Plains | 5% | -- | 6% | -- |
| Special events | -- | -- | 4% | 4% |

Source: ITRR

* Visitors could indicate more than one attraction.

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

Visitor Activities

Some differences can be seen among the activities participated in by statewide visitors and by overnight visitors to Meagher County (Table 10).

Meagher County: Wildlife watching was the most popular activity among those visitors spending a night in Meagher County (44%). Other popular activities included nature photography (42%), developed-area camping (36%) and visiting historic/interpretive sites (36%).

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

Table 10: Recreational Activity Participation

| | Meagher County* | Statewide* |
|--------------------------------|-----------------|------------|
| Wildlife watching | 44% | 45% |
| Nature photography | 42% | 33% |
| Camping (developed area) | 36% | 28% |
| Historic/interpretive sites | 36% | 29% |
| Camping (primitive areas) | 34% | 10% |
| Recreational shopping | 32% | 32% |
| Picnicking | 28% | 26% |
| Day hiking | 28% | 29% |
| Visiting Native American sites | 23% | 10% |
| Fishing | 22% | 15% |
| Visiting family or friends | 22% | 34% |
| Visiting museums | 14% | 21% |
| Gambling | 14% | 10% |
| River floating/rafting | 13% | 6% |
| Mountain biking | 11% | 8% |
| Road biking | 11% | 4% |
| Off-road/ ATV | 11% | 15% |
| Swimming (natural areas) | 9% | 7% |
| Nature studies | 5% | 9% |
| Swimming (in pools) | 5% | 14% |
| Motorboating | 4% | 9% |
| Canoeing/ kayaking | 4% | 5% |
| Special event/Festivals | -- | 8% |
| Golfing** | -- | 5% |

Source: ITRR

* Visitors could indicate more than one activity.

** This survey was conducted before the White Sulphur Spring Golf Course was constructed.

Economic Characteristics

Information about the number of visitors to an area and how much they spend during their stay there is useful for planning purposes. While travel group characteristics are based only on those who spent a night in Meagher County during the summer, economic information is more inclusive and represents all groups who spent money in the county throughout the entire year (Table 11).

ITRR staff estimated that 3,938,000 travel groups visited Montana in 2001. Of the more than 3.9 million groups, approximately 118,000 (3%) passed through Meagher County.

Meagher County: Nonresident spending in Meagher County was near \$1.55 million in 2001, less than one percent of all nonresident spending in Montana. Nonresidents spent the equivalent of \$871 per County resident.

Statewide: Nonresident visitors spent over \$1.7 billion in the state in 2001, amounting to about \$1,894 per state resident.

Table 11: Expenditures by Nonresident Travelers in Meagher County and in Montana

| Distribution of Expenditures | Meagher County | Statewide |
|---|----------------|-----------------|
| Lodging, campgrounds, etc. | 24% | 17% |
| Auto rental and repair, transportation | -- | 4% |
| Gas and oil | 15% | 22% |
| Restaurant, bar | 10% | 18% |
| Groceries, snacks | 7% | 8% |
| Retail sales | 29% | 24% |
| Miscellaneous services | 15% | 6% |
| Total travel groups to sample area, 2001 | 118,100 | 3,938,000 |
| Total expenditures in sample area, 2001 (2001\$) | \$1,549,000 | \$1,708,500,000 |
| Population (2000 census) | 1,777 | 902,195 |
| Per capita expenditures in sample area, 2001 (2001\$) | \$871 | \$1,894 |

Source: ITRR, Montana Census and Economic Information Center³.

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

Section II: The Resident Attitude Study

Methodology

A mail-back questionnaire was administered to a sample of Meagher County residents, as well as to a sample of statewide residents in the fall of 2001. The distribution followed an updated version of Dillman's Total Design Method (TDM)⁴, but differs only slightly from previous ITRR resident attitude surveys. The updates to the survey instrument and mailing sequence were implemented to improve the study's response rate, which has dwindled in recent years. This year, the rate for Meagher County was 44 percent, while the statewide response rate was 40 percent.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a selected sample of 500 Meagher County households, as well 1,000 Montana households. This 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, this 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 an additional two 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 this last mailing.

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

The reader is cautioned to bear in mind that the results presented are the opinions of only 44 percent of the Meagher County residents polled (Table 12). It is assumed that respondents did not differ from non-respondents in their opinions. Because the age distribution of the survey respondents differed from the July 1, 1999, Montana census estimates of age groups⁵, responses were weighted to more closely reflect the population of Meagher County. The results presented in this report reflect the adjusted dataset.

Table 12: Sample Sizes and Response Rates for 2001 Resident Attitude Survey

| | Meagher County | Statewide |
|---|----------------|-----------|
| Resident questionnaires mailed out | 500 | 1,000 |
| Undeliverables | 73 | 189 |
| Usable resident questionnaires returned | 190 | 328 |
| Resident Attitude Study response rate | 44% | 40% |

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

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

Meagher County Residents' Attitudes

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

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

Respondent Characteristics

Age and gender: Respondents were asked to indicate their gender as well as their age (Table 13).

Meagher County: Forty-five percent of respondents to the Meagher County survey were male, compared to the actual ratio for Meagher County of 50 percent. The average age was 51 years, and respondents ranged in age from 22 to 91 years.

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

Table 13: Age and Gender Characteristics

| | Meagher County | Statewide |
|----------------|-----------------------|------------------|
| Average age | 51 years | 47 years |
| Minimum age | 22 years | 18 years |
| Maximum age | 91 years | 94 years |
| Percent male | 45% | 53% |
| Percent female | 55% | 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. Meagher County respondents were asked how long they had lived in their county (Tables 14 and 15).

Meagher County: Almost two-thirds of Meagher County respondents were native Montanans. On average, they had lived in the county for 26 years, and in the state for 39 years. They had lived in the county for 51 percent of their lives, and in Montana for 76 percent of their lives. Twenty-four percent of respondents had lived in Meagher County longer than 40 years, while 34 percent had lived there 10 years or less.

Statewide: A little over half of statewide respondents were born in Montana. On average, they had lived in the state for 33 years, or 70 percent of their lives, and in their community for 24 years, or 51 percent of their lives. Twenty-one percent had lived in their community longer than 40 years, while 34 percent had lived there for less than 10 years.

Table 14: Residency Characteristics

| | Meagher County | Statewide |
|---------------------------------------|-----------------------|------------------|
| Born in Montana | 61% | 53% |
| Mean years lived in community | 26 years | 24 years |
| Mean years lived in Montana | 39 years | 33 years |
| Age (mean years) | 51 years | 47 years |
| Percentage of life spent in community | 51% | 51% |
| Percentage of life spent in state | 76% | 70% |

Table 15: Community Residency

| | Meagher County | Statewide |
|------------------|-----------------------|------------------|
| 10 years or less | 34% | 34% |
| 11 to 20 years | 12% | 16% |
| 21 to 30 years | 18% | 16% |
| 31 to 40 years | 12% | 13% |
| 41 to 50 years | 9% | 11% |
| 51 to 60 years | 8% | 3% |
| 61 years or more | 7% | 7% |

Employment Status: A person's employment status, type of job and sector of employment can all influence support for tourism development. In general, the more dependent a person is financially on the travel industry, the greater the support for tourism (Table 16).

Meagher County: Respondents to the Meagher County resident attitude survey overwhelmingly derive their income from agriculture (28%). Another large source of household income was construction (18%). Other sizeable income sources include education (17%), health care (16%) and services (14%). Employment sectors that were not previously identified in the survey totaled 16 percent of respondents' income. Four percent of respondents indicated that they were employed in the travel industry. However, employees in the service and retail sectors may unknowingly be part of the Montana travel industry.

Statewide: Statewide respondents derive most of their household income either from the service sector (18%) or from the education sector (18%). Other sources of household income included health care (17%), wholesale/retail trade (15%) and professionals (15%). Approximately three percent of statewide household derived some portion of their household income from the travel industry. As may be the case for Meagher County, some of the statewide respondents who indicated that they are employed in the service and retail sectors may in fact be part of the travel industry.

Table 16: Source of Household Income

| Sector | Percent of households deriving income from sector* | |
|--|--|-----------|
| | Meagher County | Statewide |
| Agriculture | 28% | 13% |
| Construction | 18% | 13% |
| Education | 17% | 18% |
| Health care | 16% | 17% |
| Services | 14% | 18% |
| Forestry | 12% | 5% |
| Professional | 10% | 15% |
| Wholesale or retail trade | 10% | 15% |
| Restaurant/bar** | 8% | 6% |
| Clerical | 7% | 7% |
| Finance, Insurance or Real Estate (FIRE) | 5% | 6% |
| Manufacturing | 5% | 5% |
| Transportation, Communication or Utilities | 5% | 8% |
| Travel industry | 4% | 3% |
| Armed Forces | 1% | 4% |
| Other | 16% | 6% |

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

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

Place of Residence: Respondents were asked to indicate if they lived in town (urban setting) or out of town (rural setting) (Table 17).

Meagher County: Sixty percent of Meagher County residents indicated that they lived in town. Residents from rural areas made up 40 percent of the respondents.

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

Table 17: Place of Residence

| | Meagher County | Statewide |
|-----------------------------|-----------------------|------------------|
| In town (urban setting) | 60% | 57% |
| Out of town (rural setting) | 40% | 43% |

Tourism and the Economy

The local economy and the role tourism and the travel industry should have in it were key issues addressed in the survey. Residents were asked how important a role they felt tourism should have in their community's economy. In addition, they ranked industries on a scale from 1 (most desired) through 8 (least desired) indicating which they felt would be most desirable for their community (Tables 18 and 19).

Meagher County: The majority (61%) of Meagher County respondents believe that the travel industry should have a role equal to other industries in the county economy, while twenty-four percent feel it should have a dominant role. Only one percent of respondents feel tourism should have no role in the local economy. Tourism/recreation ranked fourth behind agriculture/agribusiness, services and wood products as the most 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 4 percent think it should have no role. When ranking tourism along with other industry segments according to economic desirability for their community, it placed fifth, behind services, technology, agriculture/agri-business and retail/wholesale trade.

Table 18: Role of Tourism in the Local Economy

| | Meagher County | Statewide |
|----------------------------------|-----------------------|------------------|
| No role | 1% | 4% |
| A minor role | 14% | 20% |
| A role equal to other industries | 61% | 62% |
| A dominant | 24% | 14% |

Table 19: Most Desired Economic Development

| | Meagher County | | Statewide | |
|--------------------------|----------------|-------|-----------|-------|
| | Rank | Mean* | Rank | Mean* |
| Agriculture/Agribusiness | 1 | 3.02 | 3 | 3.60 |
| Services | 2 | 3.65 | 1 | 3.39 |
| Wood products | 3 | 3.94 | 7 | 5.68 |
| Tourism/Recreation | 4 | 3.96 | 5 | 4.22 |
| Retail/ Wholesale trade | 5 | 4.42 | 4 | 3.71 |
| Manufacturing | 6 | 4.85 | 6 | 4.51 |
| Technology | 7 | 4.91 | 2 | 3.42 |
| Mining | 8 | 6.06 | 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 (Table 20).

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

Statewide: Only seven percent of statewide respondents work in places that provide a majority of their products or services to tourists or tourist businesses, whereas the majority is employed in places that provide a little or none of their products or services to tourists or tourist businesses (45% and 48%, respectively).

Table 20: Employment's Dependency on Tourists for Business

| | Meagher County | Statewide |
|--|----------------|-----------|
| My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses. | 11% | 7% |
| My place of work provides <u>part</u> of its products or services to tourists or tourist businesses. | 46% | 45% |
| My place of work provides <u>none</u> of its products or services to tourists or tourist businesses. | 43% | 48% |

Interactions with Tourists

The extent of interaction between tourists and residents affects the attitudes and opinions residents hold toward tourism in general. In turn, an individual's behavior is a reflection of those same attitudes and opinions. Respondents were asked questions to determine the extent to which they interact with tourists on a day-to-day basis, as well as the quality of those interactions (Tables 21 and 22).

Meagher County: When asked about the frequency of their interactions with tourists, only 15 percent indicated that they have frequent contact. Almost one-third reported that they have infrequent contact with tourists visiting Meagher County. Although the frequency of interaction is low, the majority (67%) of Meagher County residents enjoy meeting and interacting with tourists when the occasion arises. Only four 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 of statewide respondents (68%) reported that they enjoy meeting and interacting with tourists. Twenty-eight percent are neutral to meeting and interacting with tourists, while 4 percent do not enjoy these interactions.

Table 21: Frequency of Contact with Tourists Visiting Community

| Degree of Frequency | Meagher County | Statewide |
|-----------------------------|----------------|-----------|
| Frequent contact | 15% | 16% |
| Somewhat frequent contact | 28% | 27% |
| Somewhat infrequent contact | 25% | 26% |
| Infrequent contact | 32% | 31% |

Table 22: Attitude Towards Tourists Visiting Community

| Attitude | Meagher County | Statewide |
|---|----------------|-----------|
| Enjoy meeting and interacting with tourists | 67% | 68% |
| Indifferent about meeting and interacting with tourists | 29% | 28% |
| Do not enjoy meeting and interacting with tourists | 4% | 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 this section (Table 14). Another measure is based on opinions that residents have about their community and perceived changes in population levels (Tables 23, 24 and 25).

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.

Meagher County: The Index of Community Attachment (i.e. the mean of four community attachment statements) indicates that Meagher County respondents are indeed attached to their community. An average rating of 0.68 indicates that these people like where they live. They were very positive in their feelings about their community, except in regard to opinions about the future. At -0.22, this item received a negative score, indicating that residents have little confidence when it comes to the future of Meagher County.

Residents were asked whether they perceive the population of Meagher County to be changing and if so, how the change is occurring and at what rate. Close to half of respondents (47%) feel that the county's population is not changing at all, while 22 percent feel it is increasing and approximately one-third feel it is decreasing. Of those who feel the county's population is increasing, 59 percent feel it is increasing at the right rate. Only 18 percent feel it is increasing too fast. Of those who feel the population of Meagher County to be decreasing, over half (64%) feel it is decreasing too fast, while 6 percent feel it is decreasing too slowly.

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

On the statewide level, a mere 13 percent of respondents feel that the population of their community is unchanging. Sixty-four percent feel population is increasing, while 23 percent feel it is decreasing. Of those who indicated that the population of their community is increasing, about half (48%) feel this is happening at the right rate. However, a full 50 percent feel this increase is occurring too fast. Of those who indicated that the population of their community is decreasing, the majority (62%) feels it is decreasing too fast. Thirty-one percent are happy with the perceived rate of decrease, while 7 percent feel the rate of decrease is too slow. How residents perceive population changes in the state is obviously a function of where in the state they live. Consequently, the statewide perception is not necessarily a good measure of comparison for the county-specific perception obtained from Meagher County.

Table 23: Community Attachment Statements

| | Meagher County Mean* | Statewide Mean* |
|--|----------------------------|--------------------|
| I'd rather live in my community than anywhere else. | 0.78 | 0.78 |
| If I had to move away from my community, I would be very sorry to leave. | 0.86 | 0.76 |
| I think the future of my community looks bright. | -0.22 | 0.26 |
| It is important that the residents of my community be involved in decisions about tourism. | 1.3 | 1.24 |
| Index of Community Attachment** | 0.68 | 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.

Table 24: Perceptions of Population Change

| | Meagher County* | Statewide* |
|----------------------------|--------------------|------------|
| Population is not changing | 47% | 13% |
| Population is increasing | 22% | 64% |
| Population is decreasing | 31% | 23% |

*The population of Meagher County increased by 6.2% between 1990 and 2000, and that of the state of Montana increased by 12.9% over the same time period.

Table 25: Rate of Population Change

| | Meagher County | Statewide |
|--|-------------------|-----------|
| If you feel the population in you community is <u>increasing</u> , how would you describe the change? | | |
| Population is increasing too fast | 18% | 50% |
| Population is increasing at the right rate | 59% | 48% |
| Population is increasing too slowly | 23% | 2% |
| If you feel the population in your community is <u>decreasing</u> , how would you describe the change? | | |
| Population is decreasing too fast | 64% | 62% |
| Population is decreasing at the right rate | 30% | 31% |
| Population is decreasing too slowly | 6% | 7% |

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

The concept of "Quality of Life" can be broken down into several independent factors, including the availability and quality of public services, infrastructure, stress factors such as crime and unemployment, and overall livability issues such as cleanliness. When evaluating the potential for community tourism development, it is necessary to get an understanding for residents' opinions of the current quality of life in their community. This approach helps determine 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' attitude towards this type of community development.

To this end, respondents were asked to rate the current condition of a number of factors that influence their quality of life using a scale ranging from -2 (very poor condition) to +2 (very good condition). They were also asked to rate the influence they thought increased tourism would have on these factors using a scale including -1 (negative influence), 0 (both positive and negative influence), and +1 (positive influence) (Tables 26 and 27).

Meagher County: Meagher County respondents indicated that they are mostly satisfied with quality of life variables in their community. The items receiving the most favorable ratings are the level of traffic congestion, emergency services, and safety from crime. Of these top items, emergency services and safety from crime are expected to be both positively and negatively influenced by increased tourism activity, whereas traffic congestion is expected to be negatively influenced.

Two items were rated as being in less than good condition: job opportunities and the condition of roads and highways. However, the majority of respondents (75%) indicated that they expect increased tourism development to have a positive influence on job opportunities, while 38 percent feel increased tourism will have this effect on road conditions.

Tourism is also expected to have positive influence on museums and cultural centers, parks and recreation areas, the education system and on overall cleanliness and appearance. Tourism is expected to have both positive and negative influence on local infrastructure and overall community livability.

Statewide: With a few exceptions, statewide respondents were less satisfied with the current condition of quality of life than Meagher County respondents. However, their ratings are similar, with high scores occurring in some of the same areas (emergency services, community livability, safety from crime, and parks and recreation areas). The lowest scores were for job opportunities and for cost of living.

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

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

Table 26: Quality of Life—Current Condition (Scale from -2 to +2)

| | Meagher County Mean* | Statewide Mean* |
|------------------------------------|-----------------------------|------------------------|
| Traffic congestion | 1.63 | 0.44 |
| Safety from crime | 1.15 | 1.02 |
| Emergency services | 1.14 | 1.19 |
| Museums and cultural centers | 1.05 | 0.84 |
| Overall community livability | 1.01 | 1.27 |
| Education system | 0.93 | 0.73 |
| Parks and recreation areas | 0.87 | 1.05 |
| Infrastructure | 0.44 | 0.56 |
| Cost of living | 0.00 | 0.00 |
| Overall cleanliness and appearance | 0.00 | 0.82 |
| Conditions of roads and highways | -0.19 | 0.31 |
| Job opportunities | -1.29 | -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 27: Quality of Life—Tourism’s Influence (Scale from -1 to +1)

| | Meagher County | | | | Statewide | | | |
|------------------------------------|---------------------------|--|---------------------------|--------------------|---------------------------|--|---------------------------|--------------------|
| | Negative Influence | Positive and Negative Influence | Positive Influence | Mean Score* | Negative Influence | Positive and Negative Influence | Positive Influence | Mean Score* |
| Traffic congestion | 41% | 44% | 15% | -0.25 | 68% | 24% | 8% | -0.60 |
| Safety from crime | 36% | 55% | 9% | -0.27 | 36% | 49% | 15% | -0.20 |
| Emergency services | 8% | 63% | 29% | 0.20 | 16% | 56% | 28% | 0.12 |
| Museums and cultural centers | 1% | 9% | 90% | 0.89 | 1% | 16% | 83% | 0.82 |
| Overall community livability | 8% | 51% | 41% | 0.32 | 10% | 63% | 27% | 0.17 |
| Education system | 3% | 50% | 47% | 0.44 | 9% | 50% | 41% | 0.31 |
| Parks and recreation areas | 7% | 36% | 57% | 0.51 | 13% | 40% | 47% | 0.33 |
| Infrastructure | 19% | 57% | 24% | 0.06 | 30% | 43% | 27% | -0.02 |
| Cost of living | 24% | 51% | 25% | 0.00 | 28% | 49% | 23% | -0.06 |
| Overall cleanliness and appearance | 13% | 40% | 47% | 0.33 | 24% | 48% | 28% | 0.03 |
| Conditions of roads and highways | 16% | 46% | 38% | 0.21 | 38% | 34% | 28% | -0.09 |
| Job opportunities | 7% | 18% | 75% | 0.68 | 6% | 28% | 66% | 0.60 |

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

In addition to tourism's perceived influence on well-being, another method of measuring the degree of support for the travel industry 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. The statements deal with issues such as tourism support, tourism concerns, and land use issues (Table 28).

Index of Tourism Support

Meagher County: The majority of Meagher County respondents (88%) 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. A full 78 percent feel that their community is a good place for tourism investment, while 81 percent indicated that they believe increased tourism will help their community grow in the right direction. Eighty-two percent of respondents also feel that any negative impacts of tourism are outweighed by its benefits. The majority (78%) of Meagher County respondents feel that tourism promotion by the state benefits the county economically, while over two-thirds (67%) believe that jobs in the travel industry offer opportunities for advancement. Almost as many (63%) feel that overall quality of life for Montana residents will improve with increased tourism. On the downside, a majority of respondents (63%) do not see a connection between increased tourism in their community and a more secure income for themselves, just as 65 percent do not think that increased tourism will lead to any financial benefit on their part.

Despite the apparent lack of personal economic benefit to respondents in Meagher County, they still support tourism development in the area because they feel it will benefit their community. The Index of Tourism Support, i.e. the mean of the average score for each statement, equals 0.39, indicating that there is considerable support for the travel industry in the county, a support that is relatively strong despite the perceived lack of personal benefit to people.

Statewide: On the whole, statewide respondents are less supportive of tourism and the travel industry than Meagher County respondents. The average score for each statement is consistently lower for statewide respondents than it was for Meagher County respondents. However, there is still an overall positive sentiment regarding tourism development. Eighty-one percent support continued tourism promotion and advertisement to out-of-state visitors, while two-thirds (65%) agree that their community is a good place to invest in tourism development. Sixty-five percent think that increased tourism in the state will help their community grow in the right direction, and a full 79 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 44 percent believe tourism jobs offer opportunity for advancement. However, 53 percent of statewide respondents do not think that increased tourism in the state will improve residents' quality of life.

Statewide respondents also 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 increased or more secure income for themselves, and 72 percent do not think they will benefit financially if tourism were to increase in their community.

The failure to recognize the connection between tourism development and personal benefit may be one of the main obstacles currently facing this type of development in the state, as well as a reason for the relatively low score of 0.18 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 28: Index of Tourism Support

| | Meagher County | | | | | Statewide | | | | |
|---|-------------------|----------|-------|----------------|-------------|-------------------|----------|-------|----------------|-------------|
| | Strongly Disagree | Disagree | Agree | Strongly Agree | Mean Score* | Strongly Disagree | Disagree | Agree | Strongly Agree | Mean Score* |
| I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana. | 4% | 8% | 67% | 21% | 0.93 | 7% | 12% | 63% | 18% | 0.72 |
| My community is a good place to invest in tourism development. | 5% | 17% | 60% | 18% | 0.68 | 9% | 26% | 51% | 14% | 0.37 |
| Increased tourism would help my community grow in the right direction. | 3% | 15% | 62% | 20% | 0.81 | 8% | 27% | 53% | 12% | 0.35 |
| The overall benefits of tourism outweigh the negative impacts. | 6% | 12% | 73% | 9% | 0.68 | 4% | 25% | 62% | 9% | 0.47 |
| Tourism promotion by the state of Montana benefits my community economically. | 2% | 20% | 67% | 11% | 0.64 | 5% | 17% | 61% | 17% | 0.67 |
| I believe jobs in the tourism industry offer opportunity for advancement. | 9% | 24% | 58% | 9% | 0.33 | 10% | 41% | 43% | 6% | 0.00 |
| If tourism increases in Montana, the overall quality of life for Montana residents will improve. | 8% | 29% | 58% | 5% | 0.22 | 10% | 37% | 49% | 4% | 0.00 |
| If tourism increases in my community, my income will increase or be more secure. | 17% | 46% | 30% | 7% | -0.35 | 24% | 38% | 30% | 8% | -0.39 |
| I will benefit financially if tourism increases in my community. | 22% | 43% | 27% | 8% | -0.45 | 25% | 45% | 25% | 5% | -0.60 |
| Index of Tourism Support** | 0.39 | | | | | 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 and crowding (Table 29).

Meagher County: Eighty-two percent of Meagher County respondents believe that most tourism jobs pay low wages. Close to half (46%) feel that tourists do not pay their fair share for the services they use, while 50 percent agree that vacationing in Montana influences too many people to move to the state. However, the majority (72%) does not feel the state is becoming too crowded because of tourists, and only 24 percent feel that out-of-state visitors limit their access to recreation opportunities.

Despite the wage issue, Meagher County respondents are not too concerned when it comes to tourism development, as indicated by a -0.15 score for the Index of Tourism Concern. In this index, a higher score means a higher level of concern, and Meagher County respondents produced a negative score. Were it not for the wage issue, the score would have been even lower.

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

With higher scores in all categories, it is no surprise that the Index of Tourism Concern is higher as well. At 0.76, it indicates that there is some concern regarding tourism development in the state as a whole.

Table 29: Index of Tourism Concern

| | Meagher County | | | | | Statewide | | | | |
|--|-------------------|----------|-------|----------------|-------------|-------------------|----------|-------|----------------|-------------|
| | Strongly Disagree | Disagree | Agree | Strongly Agree | Mean Score* | Strongly Disagree | Disagree | Agree | Strongly Agree | Mean Score* |
| I believe most of the jobs in the tourism industry pay low wages. | - | 18% | 68% | 14% | 0.77 | 2% | 18% | 58% | 22% | 0.79 |
| Tourists do not pay their fair share for the services they use. | 3% | 51% | 35% | 11% | 0.00 | 4% | 41% | 38% | 17% | 0.24 |
| Vacationing in Montana influences too many people to move to the state. | 5% | 45% | 37% | 13% | 0.08 | 8% | 41% | 32% | 19% | 0.12 |
| In recent years, Montana is becoming overcrowded because of more tourists. | 6% | 66% | 21% | 7% | -0.45 | 11% | 46% | 30% | 13% | -0.12 |
| My access to recreation opportunities is limited due to the presence of out-of-state visitors. | 8% | 68% | 17% | 7% | -0.55 | 11% | 53% | 23% | 13% | -0.27 |
| Index of Tourism Concern** | -0.15 | | | | | 0.76 | | | | |

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

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

Land Use Issues

Montana has a rich land heritage that appeals to residents and visitors alike. A large part of Montana's charm is related to its wide-open spaces and residents are naturally sensitive with respect to how this resource is treated. Respondents were asked to express their agreement or disagreement with several statements related to land use issues, with responses ranging from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement, while a negative score indicates disagreement (Table 30).

Meagher County: Seventy-nine percent of respondents agree that there is adequate undeveloped open space in the county, but 51 percent worry about its potential disappearance. Seventy-five percent would support land use regulations to manage growth in the county, while 24 percent feel their access to recreation opportunities is limited due to the presence of out-of-state visitors.

Statewide: Among statewide respondents, 59 percent agree that there is adequate undeveloped open space in their community. Over half (60%) is concerned about its disappearance. Over three-fourths (78%) of statewide respondents would support some form of land-use regulations to control the types of future growth in their community. Thirty-six percent feel their recreation opportunities are limited due to the presence of tourists.

Table 30: Land Use Issues

| | Meagher County | | | | | Statewide | | | | |
|--|-------------------|----------|-------|----------------|-------------|-------------------|----------|-------|----------------|-------------|
| | Strongly Disagree | Disagree | Agree | Strongly Agree | Mean Score* | Strongly Disagree | Disagree | Agree | Strongly Agree | Mean Score* |
| There is adequate undeveloped open space in my community. | 5% | 16% | 62% | 17% | 0.68 | 8% | 33% | 47% | 12% | 0.21 |
| I am concerned with the potential disappearance of open space in my community. | 3% | 46% | 31% | 20% | 0.19 | 7% | 33% | 37% | 23% | 0.37 |
| I would support land use regulations to help manage types of future growth in my community. | 8% | 17% | 60% | 15% | 0.57 | 7% | 15% | 57% | 21% | 0.68 |
| My access to recreation opportunities is limited due to the presence of out-of-state visitors. | 8% | 68% | 17% | 7% | -0.55 | 11% | 53% | 23% | 13% | -0.27 |

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

Tourism-Related Decision-Making

Residents have strong feelings about participating in decisions that will ultimately affect their community and their own lives. They were asked to respond to two statements related to who should be making decisions about tourism in their community, with responses ranging from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement, while a negative score indicates disagreement (Table 31).

Meagher County: Meagher County respondents feel strongly that residents should be involved in decision-making regarding local tourism development. Ninety-nine percent of respondents either agreed or agreed strongly that it is important that residents be involved in decisions about tourism, while 59 percent disagreed that decisions regarding tourism volume are best left to the private sector.

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

Table 31: Tourism-related Decision-making

| | Meagher County | | | | | Statewide | | | | |
|---|-------------------|----------|-------|----------------|----------------|-------------------|----------|-------|----------------|----------------|
| | Strongly Disagree | Disagree | Agree | Strongly Agree | Average Score* | Strongly Disagree | Disagree | Agree | Strongly Agree | Average Score* |
| It is important that residents of my community be involved in decisions about tourism. | - | 1% | 65% | 34% | 1.30 | 2% | 6% | 51% | 41% | 1.24 |
| Decisions about how much tourism there should be in my community are best left to the private sector. | 14% | 45% | 32% | 9% | -0.25 | 26% | 41% | 25% | 8% | -0.50 |

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

Advantages and Disadvantages of Tourism Development

To further clarify the perceived benefits and costs of tourism development, respondents were asked what they thought would be the top advantage and disadvantage of increased tourism in their community. These were open-ended questions where respondents provided their thoughts in their own words. The responses were then assigned to general categories to facilitate comparison (Tables 32 and 33).

Meagher County: The top advantage of increased tourism identified by Meagher County respondents was overall economic benefit. Seventy-nine percent of respondents indicated more jobs, higher income and higher revenue for local businesses as the top advantages. In terms of disadvantages, 16 percent identified more people as the chief problem caused by tourism growth, while 11 percent of the respondents feel that increased crime/loss of safety presents the greatest disadvantage.

Statewide: Statewide respondents also identified improved economic conditions as being the top advantage of increased tourism in their community (84%). In terms of disadvantages, more people visiting the state was of concern to a large portion of statewide respondents (20%), as was traffic and stress on local infrastructure (19% and 15%, respectively).

Table 32: Advantages Associated with Increased Tourism

| | Meagher County* | | Statewide* | |
|--|-----------------------|------------------------|-----------------------|------------------------|
| | Number of Respondents | Percent of Respondents | Number of Respondents | Percent of Respondents |
| Economic benefit | 157 | 79% | 236 | 84% |
| More attractions/businesses/services | 16 | 8% | -- | -- |
| No advantage | 9 | 5% | 18 | 6% |
| More people | 8 | 4% | 4 | 1% |
| Cultural awareness | 2 | 1% | 5 | 2% |
| Awareness of state | 1 | <1% | 10 | 4% |
| Civic pride | 1 | <1% | -- | -- |
| Better roads | 1 | <1% | 1 | <1% |
| Clean-up of city | 1 | <1% | -- | -- |
| Less reliance on extractive industries | 1 | <1% | 1 | <1% |

* Respondents could offer more than one suggestion.

Table 33: Disadvantages Associated with Increased Tourism

| | Meagher County* | | Statewide* | |
|---|-----------------------|------------------------|-----------------------|------------------------|
| | Number of Respondents | Percent of Respondents | Number of Respondents | Percent of Respondents |
| More people | 25 | 16% | 57 | 20% |
| Increased crime/ decreased safety | 17 | 11% | 11 | 4% |
| No disadvantages | 14 | 9% | 37 | 13% |
| Litter/ pollution | 11 | 7% | 14 | 5% |
| Land closures/ zoning/ development | 10 | 6% | -- | -- |
| Over-use, misuse of lands/ roads | 10 | 6% | -- | -- |
| More traffic | 9 | 5% | 53 | 19% |
| Stress on infrastructure | 9 | 5% | 42 | 15% |
| Outside influences | 9 | 5% | -- | -- |
| Noxious weeds/ impact on natural environment | 5 | 3% | -- | -- |
| Increased taxes | 5 | 3% | 2 | 1% |
| Loss of some industries | 5 | 3% | -- | -- |
| Price increases | 5 | 3% | 11 | 4% |
| Low-wage jobs | 4 | 2% | -- | -- |
| Loss of agriculture lands to development | 4 | 2% | -- | -- |
| Decreased quality of life | 3 | 2% | 5 | 2% |
| Visitors don't pay for impacts | 3 | 2% | 17 | 6% |
| Loss of quiet | 3 | 2% | -- | -- |
| Benefit is limited/ seasonal | 3 | 2% | -- | -- |
| More signs/advertising, commercialism | 3 | 2% | -- | -- |
| Lack of respect | 2 | 2% | 10 | 4% |
| More regulations | 1 | 1% | -- | -- |
| Negative attitudes towards tourism/ development | 1 | 1% | 1 | <1% |
| Reliance on tourism | 1 | 1% | 12 | 4% |
| More development | -- | -- | 3 | 1% |
| Anti-growth attitude towards tourism in county | -- | -- | 1 | <1% |

* Respondents could offer more than one suggestion.

Questions Specific to Meagher County

The Meagher County CTAP action committee was given the opportunity to include questions specific to their county on the resident attitude questionnaire. The responses to these questions and other community-specific items are reported below.

Meagher County Characteristics

The following three items deal with characteristics, both positive and negative, of Meagher County. The questions were asked in an open-ended format to solicit residents' true feelings, and the responses reflect their own wording. The answers are used in the visioning part of the CTAP, where residents make development plans for the future (Tables 34, 35 and 36).

Valued characteristics of Meagher County: Respondents were asked what characteristics of Meagher County they value and would like to see continued into the future. At the top of the list was the friendliness and closeness of local residents (19%), but respondents also appreciate the area's rural character and the open space (18% and 12%, respectively).

Table 34: Valued Characteristics of Meagher County

| Characteristics* | Number of Respondents | Percent of Respondents |
|---|-----------------------|------------------------|
| Friendliness/ honesty/ closeness | 48 | 19% |
| Rural characteristic/ western lifestyle/ small town | 47 | 18% |
| Open space/ parks/ recreation | 30 | 12% |
| Scenery | 28 | 11% |
| Agriculture/ ranching | 27 | 11% |
| Uncrowded/ peace and quiet/ privacy | 13 | 5% |
| Historic character | 10 | 4% |
| Population | 9 | 4% |
| Business and services | 8 | 3% |
| Quality of hunting and fishing | 7 | 3% |
| Logging/ mining | 7 | 3% |
| Clean air/ clean water | 7 | 3% |
| Remote location | 5 | 2% |
| Family values/ youth activities | 3 | 1% |
| Tourism | 2 | 1% |
| Quality of life | 2 | 1% |
| Slow development | 1 | <1% |
| Volunteer organizations | 1 | <1% |
| Conservative government | 1 | <1% |

*Percentages may not add to 100 due to rounding.

Disliked characteristics of Meagher County: Planning for desired conditions is one thing, but it is also important to avoid undesirable conditions. Proper planning can do away with these. To that end, respondents were asked to identify what characteristics of Meagher County they dislike and would not like to see continued into the future. The primary concern turned out to be negative attitudes and gossip (11%), but 10 percent are concerned with drug and alcohol use in the county, and some worry about land closure and littering (8% each).

Table 35: Disliked Characteristics of Meagher County

| Characteristics* | Number of Respondents | Percent of Respondents |
|--|------------------------------|-------------------------------|
| Negative attitudes/ gossip | 16 | 11% |
| Drugs/ alcohol/ gambling | 14 | 10% |
| Land closures | 11 | 8% |
| Litter/ haphazard appearance/ abandoned structures | 11 | 8% |
| Lack of cooperation/ community involvement | 10 | 7% |
| Subdivisions/ lack of zoning | 9 | 6% |
| Low wages/ low standard of living | 9 | 6% |
| People moving to Meagher County | 8 | 6% |
| Welfare recipients | 7 | 5% |
| Improved economy/ jobs/ development | 6 | 4% |
| Lack of jobs | 6 | 4% |
| Out-of-state/ out-of-town influences | 5 | 4% |
| Decline in services | 5 | 4% |
| Logging/ mining | 4 | 3% |
| Road closures | 3 | 2% |
| Government programs/ involvement | 2 | 1% |
| High prices | 2 | 1% |
| Guided hunting | 2 | 1% |
| People leaving Meagher County | 2 | 1% |
| Increasing proportion of retirees | 2 | 1% |
| Absence of development | 1 | 1% |
| Controlled/ prescribed burns | 1 | 1% |
| ATV use | 1 | 1% |
| Dependence on tourism | 1 | 1% |
| Taxes | 1 | 1% |
| Billboards/ large signs | 1 | 1% |

*Percentages may not add to 100 due to rounding.

Missing characteristics of Meagher County: Another facet of planning, in addition to learning what should be kept and what should be avoided, is finding out what positive aspects can be developed within the community. In response to the question of what is missing from Meagher County that residents would like to see in the future, 43 percent answered “economic improvement”. Nine percent would like to see more restaurants, while another 9 percent would like to see an athletic facility built in the county.

Table 36: Characteristics Missing from Meagher County

| Characteristics* | Number of Respondents | Percent of Respondents |
|--|------------------------------|-------------------------------|
| Economic improvements/ development/ jobs | 65 | 43% |
| Restaurants | 14 | 9% |
| Athletic facility/ parks/ recreation | 14 | 9% |
| People/ community spirit | 12 | 8% |
| Schools/ health services | 9 | 6% |
| Supermarket/ shopping options | 6 | 4% |
| Better roads/ transportation system | 6 | 4% |
| Cleanliness | 5 | 3% |
| Timber industry/ logging | 4 | 3% |
| Low income/ senior housing | 2 | 1% |
| Zoning | 2 | 1% |
| Clean air, water/ healthy environment | 2 | 1% |
| Diversity/ equality | 2 | 1% |
| Improved campsites | 1 | 1% |
| Pride in heritage/ history | 1 | 1% |
| Better TV access | 1 | 1% |
| County-wide goals/ management | 1 | 1% |
| Active Chamber of Commerce | 1 | 1% |
| Convention center | 1 | 1% |
| Tourist/ travel services | 1 | 1% |

*Percentages may not add to 100 due to rounding.

Meagher County Tourist Attractions

Residents were asked to identify what they felt Meagher County had to offer visitors in terms of tourist attractions. These were open-ended questions as well (Table 37).

Tourist attractions in Meagher County: Eighteen percent of Meagher County respondents feel that the Castle Museum is the county's strongest asset as a tourist attraction, closely followed by hunting and fishing (17%). Other valued attractions include the hot springs (12%) and the location and scenery of the county (10%).

Table 37: Tourist Attractions in Meagher County

| Strengths* | Number of Respondents | Percent of Respondents |
|---------------------------------|------------------------------|-------------------------------|
| Castle Museum | 70 | 18% |
| Hunting and fishing | 64 | 17% |
| Hot springs | 45 | 12% |
| Location/ scenery | 37 | 10% |
| Bain Museum | 30 | 8% |
| Ski area | 28 | 7% |
| Camping | 19 | 5% |
| Hiking | 18 | 5% |
| Snowmobiling | 15 | 4% |
| History | 14 | 4% |
| Smith River | 13 | 3% |
| Ghost towns/ old-west lifestyle | 8 | 2% |
| National Forests | 7 | 2% |
| Golf | 6 | 2% |
| Guest ranches, bed & breakfast | 5 | 1% |
| Reservoir/ lakes | 5 | 1% |
| Fort Logan | 2 | 1% |
| CM Russell Museum | 1 | <1% |
| Movie theatre | 1 | <1% |

*Percentages may not add to 100 due to rounding.

Marketing Meagher County as a Tourist Destination

Residents were asked to identify how they felt Meagher County could market itself as a tourist destination. Again, these were open-ended questions (Table 38).

Marketing Meagher County as a tourist destination: Almost one-half (48%) of Meagher County residents indicated that increased advertising of the area's attractions would help market the county as a tourist destination. Twelve percent believe that the scenic aspects of the county will be helpful in marketing the area, while 9 percent think that the big game viewing opportunities as well as the availability of hunting and fishing opportunities will help make the county into a tourist destination.

Table 38: Marketing Meagher County as a Tourist Destination

| Marketing options* | Number of Respondents | Percent of Respondents |
|---|-----------------------|------------------------|
| Advertise area attractions more/ use Internet | 67 | 48% |
| Scenic/ outdoors | 17 | 12% |
| Big game viewing/ hunting and fishing | 13 | 9% |
| Improve roads | 6 | 4% |
| Clean up town | 6 | 4% |
| Winter sports | 5 | 4% |
| Old west/ historical value | 5 | 4% |
| Group tours/ package vacation | 4 | 3% |
| Festivals/ annual events/ conventions | 3 | 2% |
| Guest ranches | 3 | 2% |
| Rest stop facilities | 3 | 2% |
| Promote location between parks | 3 | 2% |
| Tourist information center | 2 | 1% |
| Develop new attractions | 2 | 1% |
| Develop spa | 1 | 1% |

*Percentages may not add to 100 due to rounding.

Highway 89

Residents were asked their opinion on how to encourage greater use of Highway 89 between Glacier and Yellowstone national parks (Table 39).

Encouraging Greater Use of HWY 89: Forty-three percent of respondents indicated that they believed improving the highway would encourage use the most. A third of respondents (33%) believed increased advertising and signage on the Interstates would encourage use of the highway between Glacier and Yellowstone, while 10 percent believed that emphasizing that the route is a scenic route would increase use.

Table 39: Encouraging Greater Use of HWY 89

| Options* | Number of Respondents | Percent of Respondents |
|--|-----------------------|------------------------|
| Improve highway | 66 | 43% |
| Increased advertising/ signage | 51 | 33% |
| Emphasize scenery/ scenic route | 16 | 10% |
| Add rest areas/ restaurants/ motels | 10 | 7% |
| Hold events during peak season | 5 | 3% |
| List tourist attraction in advertising | 4 | 3% |
| Information center | 1 | 1% |
| Reduce commercial traffic | 1 | 1% |

*Percentages may not add to 100 due to rounding.

First Impression of Meagher County

Residents were asked what their impression of the county would be if they were a first-time visitor to the area. This question was open-ended as well (Table 40).

First Impression of Meagher County: Seventeen percent of respondents indicated that their first impression of the county would be that it is in need of a clean-up. Another 16 percent thought their first thoughts would be that of a small and secluded rural county, while 12 percent indicated that their initial impression of Meagher County would be the beautiful landscape and the surrounding scenery.

Table 40: Visitor's First Impression of Meagher County

| Impressions* | Number of Respondents | Percent of Respondents |
|---------------------------------------|-----------------------|------------------------|
| Need for clean-up | 34 | 17% |
| Small and secluded, rural | 32 | 16% |
| Beautiful landscape/ scenery | 25 | 12% |
| Dying, depressed town | 24 | 12% |
| Laid-back/ simple lifestyle/ friendly | 22 | 11% |
| Quiet, few people | 15 | 7% |
| Lack of things to do | 13 | 6% |
| General negative | 11 | 5% |
| Lack of pride in community | 8 | 4% |
| General positive | 8 | 4% |
| Unique/ quaint | 6 | 3% |
| Historical atmosphere | 5 | 2% |
| Need more trees | 1 | <1% |
| Too many bars | 1 | <1% |

*Percentages may not add to 100 due to rounding.

Improvements in Meagher County Infrastructure, Businesses and Services

Infrastructure Improvements: One of the goals of the Meagher County tourism action committee is to make the area more welcoming to tourists. The Resident Attitude questionnaire suggested various kinds of infrastructure developments and had respondents rate the necessity of each (Table 41 and 42).

Not surprisingly in light of the previous section, improving city appearance was indicated by most as a necessary improvement of Meagher County (64%), while 48 percent indicated a need for more restaurants and 45 percent would like to see highway improvements. Other improvements encouraged by large portions of the respondents include the addition of a tourist information center, city street improvements and the addition of sidewalks on city side streets (44%, 39% and 30%, respectively).

Table 41: Infrastructure Improvements

| Item* | |
|-------------------------------------|-----|
| City appearance | 64% |
| More restaurants | 48% |
| Highway improvements | 45% |
| Tourist information center | 44% |
| City street improvements | 39% |
| Sidewalks on side streets | 30% |
| Health services | 14% |
| Sidewalks on main downtown streets | 11% |
| Other infrastructure improvements** | 10% |
| Sewer system | 7% |
| More hotel/ motel | 4% |

* Respondents could give more than one answer.

** For a detailed list of other development suggestions, please refer to Table 42, below.

Table 42: Specific Other Infrastructure Improvements*

| Item** | |
|--|-----|
| Clean up city/ county | 31% |
| More parks | 23% |
| Preserve/ restore older buildings | 15% |
| Convention center | 8% |
| Entertainment | 8% |
| Highway improvement (other than above) | 8% |
| More multi-purpose land available | 8% |

* From the 10 percent who responded "Other" in Table 41, above.

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

Improvements in Businesses and Services: Working under the assumption that many businesses and services primarily intended to serve tourists also can greatly benefit residents of a community, the questionnaire provided a list of businesses and services that could be attractive to visitors and residents alike and asked that respondents rate them according to their preferences (Table 43).

Again, adding more eating establishments is at the top of the list with 63 percent of respondents indicating their preference in this area. Other popular requests include a gift store (48%), more camping areas (44%), a new supermarket/grocery store (42%) and more children's activities (38%). Clothing stores and sporting goods stores are other businesses that residents would like to see, while at the same time benefiting visitors to the community (31% each).

Table 43: Business and Service Improvements

| Item* | |
|---|-----|
| Restaurants/ cafes | 63% |
| Gift shops | 48% |
| Camping areas | 44% |
| Supermarket/ grocery store | 42% |
| Children's activities | 38% |
| Clothing store | 31% |
| Sporting goods store | 31% |
| Hotels/ motels | 26% |
| Movie theatre | 23% |
| Other business and service improvements** | 20% |
| Arcade/ Pool hall | 20% |
| Beauty salon | 18% |
| Guiding services | 16% |
| Casino | 6% |

* Respondents could give more than one answer.

** For a detailed list of other development suggestions, please refer to Table 44, below.

Table 44: Specific other Business and Service Improvements**

| Item* | |
|--------------------------|-----|
| Bowling alley | 55% |
| Museum/ gallery | 18% |
| Health/ fitness facility | 5% |
| Guided recreation | 5% |
| Laundromat | 5% |
| Youth Center | 4% |
| Florist | 4% |
| Gas station | 4% |
| Bike trails | 3% |

* From the 20 percent who responded "Other" in Table 43, above.

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

Willingness to participate

A final area-specific question dealt with community members' willingness to participate in the tourism-related economic development effort in Meagher County. Residents were asked to indicate whether they would be willing to contribute their time or money to tourism development and promotion, or if they preferred to be left out of the effort. Thirty-five percent of respondents indicated their willingness to donate time, while 5 percent indicated they were willing to donate money to the effort. Sixty percent did not wish to participate in the development effort (Table 45).

Table 45: Willingness to Participate in Development and Promotion

| | |
|---------------------------------|-----|
| Willing to donate time | 35% |
| Willing to donate money | 5% |
| Not interested in participating | 60% |

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 (Table 46). For a verbatim list of comments, please see Appendix B.

Table 46: General Comments by Meagher County Respondents

| | Count |
|---|-------|
| Visitor facilities/ services need improvement | 5 |
| Generally opposed to tourism | 3 |
| Need more cooperation, community-minded | 3 |
| General positive comments | 3 |
| Pro-tourism, but with limits | 3 |
| General pro-tourism | 3 |
| Ways to improve economy, other than tourism | 2 |
| Fear of over-development | 2 |
| Need good jobs | 1 |
| Need new ideas | 1 |
| Other | 2 |

Appendix A: Meagher County Survey Instrument

Please include any additional comments below:

Resident Attitudes Toward Tourism in Meagher County



Fall 2001



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

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

PART 1. Please indicate your involvement in the tourism industry and the role you think it should have in the Meagher County economy.

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

- () Frequent contact
- () Somewhat frequent contact
- () Somewhat infrequent contact
- () Infrequent contact

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

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

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

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

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

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

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

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

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

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



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

- () Too fast
- () About right
- () Too slow

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

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

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

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

4. To make Meagher County more welcoming to tourists, some improvements should be made to the area's infrastructure. Using a check mark (?), please indicate on the list below which areas you feel need improvement.

- | | |
|--|-------------------------------|
| () More hotels/motels | () Sewer system |
| () Highway improvements | () City appearance |
| () City street improvements | () More restaurants |
| () Tourist information center | () Health services |
| () Sidewalks on main downtown streets | () Sidewalks on side streets |
| () Other: _____ (please specify) | |

3. Many businesses and services primarily intended to serve tourists can also benefit residents of Meagher County. From the list below, please indicate which businesses or services you think would be attractive to visitors and residents alike. Please use checkmarks (?) to indicate your preferences.

- | | |
|--|--|
| <input type="checkbox"/> Hotels/motels | <input type="checkbox"/> Restaurants/cafes |
| <input type="checkbox"/> Gift shops | <input type="checkbox"/> Camping areas |
| <input type="checkbox"/> Sporting goods stores | <input type="checkbox"/> Guiding services |
| <input type="checkbox"/> Children's activities | <input type="checkbox"/> Casino |
| <input type="checkbox"/> Supermarket/grocery store | <input type="checkbox"/> Movie theatre |
| <input type="checkbox"/> Beauty salon | <input type="checkbox"/> Clothing store |
| <input type="checkbox"/> Arcade/Pool hall | |
| <input type="checkbox"/> Other: _____ (please specify) | |

5. What does Meagher County have to offer visitors in terms of tourist attractions?

7. How can Meagher County market itself as a tourist destination?

3. How can we encourage greater use of Highway 89 between Glacier and Yellowstone national parks?

9. If you were a first-time visitor to towns in Meagher County, what would your first impression be?

10. Are you, as a community member, willing to help with tourism development or promotion?

- Yes, I am willing to donate my time to help with tourism development or promotion.
- Yes, I am willing to donate money to help with tourism development or promotion.
- No, I do not wish to participate in tourism development or promotion.

(If you answered YES to question 10, you may want to attend one of the Community Tourism Assessment Program group meetings which are held at the City Hall in White Sulphur Springs on the third Thursday of each month, at 5:30 p.m., or contact Tammy DeCock at 547-3633.)

PART 3. Questions concerning quality of life in Meagher County.

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

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

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

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

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

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

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

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

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

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

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

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

4. Where in Meagher County do you live? Please ? your answer.

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

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

() Yes () No

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

() Male () Female

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

() Employed () Retired () Unemployed/Disabled

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

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

Appendix B: Verbatim Comments from Survey Form

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

- I would hate to see Meagher Co. begin to look like the park or Gallatin County.
- As in the other places, there are always things to see. In this co. the roads are improving and the airport has been improved.
- Facilities for people to camp and visit here need improvement and more of them.
- Meagher Co. has been a good place to live, but is now quite stressed by a 3-year drought and high prices for machinery and gas.
- Please publish your summary of this data at least twice in the Meagher County News.
- To encourage young people to stay here we must have good jobs. Tourism provides very little to those people who work in the system.
- Tourism—I'm in favor of it!
- I feel this community lacks professionalism in their service to the public, especially in the restaurants.
- The only thing wrong with Montana now is we have too many people!!
- A small manufacturing company would stimulate the economy and reduce unemployment. Wouldn't lose all of our young people to other areas. Wouldn't help tourism, would it? Unless it had an outlet store with it.
- I do believe tourism could benefit a depressed economy. However, too much can truly hurt the area. Due to increased prices and environmental abuse, tourism can have a negative impact. Introducing small increments in the appropriate areas will help the community adjust and move carefully to improve their town.
- Being overrun with tourists destroys our quality of life. I would rather see more interest in some type of manufacturing industry with higher wages.
- We need to promote what we have and welcome both change and tourists with open arms.
- Main Street does not look nice or welcoming.
- I like Meagher County and enjoy its available outdoor opportunities.
- We need cooperation from between business and towns. Unity will make success possible, jealousy will insure failure.
- We need to get people motivated to work together for improving our community in positive ways.
- I think the project is a good one and I hope to become involved at some point.
- Tourism may be the only hope for WSS as agriculture can't do it alone. I don't see big business (other than big business buying up ranches) moving here and manufacturing is crippled by the fact that WSS is on the road to nowhere as far as shipping. Lots of things need to be done at the same time for a big Tourism Increase, like more law enforcement, fire and emergency personnel to cover the influx. Then, as the economy can handle, more restaurants, hotels, etc. Right now if you added one more of the above, they'd all go broke together.
- There is a lot of fixing needs to be done.
- We need businesses, which environmentalists don't seem to think we should have. Tourists are good, but they don't pay taxes.
- We need to get past the "me" mentality and get to the "we" mentality. We need to come up with some new ideas and start thinking "out of the box".
- Comments shared by tourists we have come in contact with directly through business; town looks really depressed, no place to eat and could use paint.
- Until Meagher County is able to offer future jobs in lucrative positions...for our own community members, tourism should take a back seat.