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Tourism & Its Impacts on Rural Communities: White Sulphur Springs 2018

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Tourism & Its Impacts on Rural Communities: White Sulphur Springs 2018

White Sulphur Springs, Montana

Carter Bermingham

Norma P. Nickerson, Ph.D.

Megan Tanner Schultz, M.S.

A sample of visitors to White Sulphur Springs completed a questionnaire regarding their visitation. Results show that most people are visiting for outdoor recreation such as scenic driving, camping, and fishing while on vacation, recreation, or pleasure in White Sulphur Springs.

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White Sulphur Springs, Montana

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Case Study Report 2019-5

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Abstract

This study was a collaborative effort between the Institute for Tourism and Recreation Research and the community of White Sulphur Springs, Montana to provide insight into the impacts tourism has on rural communities. Paper surveys on site were completed by 104 visitors. Results show that 55% of respondents were residents of Montana. Of those Montana residents, 96% were from outside of Meagher County. Visitors spent an average of 6.22 nights away from home and 3.60 of those nights were in the town of White Sulphur Springs. Most spending in White Sulphur Springs was on retail goods and services (\$17,731). Respondents to the survey reported a total spending of \$64,704 (see Table 3*) in the White Sulphur Springs area. Most visitors stayed in White Sulphur Springs because it was their destination for vacation, recreation, or pleasure but agreed that they visited White Sulphur Springs because it is relaxing, a scenic drive, and less crowded.

Executive Summary

Overnight visitors to White Sulphur Springs were surveyed at the Branding Iron Café, Two Bassett Brewery, All Seasons Inn, Spa Hot Springs Motel, Tenderfoot Motel, Montana Road House, Stockman Bar, and Snook's Diner. The respondents represented out-of-county Montana residents (53%) and out-of-state (45%) visitors to the White Sulphur Springs area. The visitors, upon arrival, make important economic contributions to the White Sulphur Springs area. The results of the study are worth considering for future planning within the White Sulphur Springs community.

- 91% of visitors who reside outside of Meagher County spent at least one night away from home. The mean number of nights spent in Montana was 5.89 nights; mean number of nights in White Sulphur Springs was 3.60.
- 54% of respondents who stayed in White Sulphur Springs reported staying at a hotel/motel/B&B/rental home followed by 24% staying at a private campground.
- More money was spent by these out-of-county visitors in retail goods and services (\$17,731), restaurant/bar (\$15,570), and hotel/motel/B&B/rental (\$11,626) than other spending categories.
- 92% of respondents reported that they were spending for a travel group size of at least two or more people (including respondent). The average travel group size was 2.65 people.
- Visitors were mostly traveling as a couple (51%). Other group types with high response were: immediate family (16%) & self (9%).
- Respondents traveled with a variety of age categories in their group – the highest percentages were 55-64 (47%), 65-74 year olds (37%), and 45-54 year olds (24%).
- Visitors, whether on this trip or in past trips, were mostly in the area for scenic driving (50%). Other activities with high response rates were camping (40%) & fishing (25%).
- 34% of respondents indicated they planned to spend time in the area 1-7 days before arriving with 18% indicating they planned that day to spend time in White Sulphur and another 18% had planned over 6 months before arriving.
- Visitors, whether on this trip or in past trips, were mostly in the area to visit or had visited the Spa Hot Springs (67%). Other places that were frequently visited were the Castle Museum (36%) and the Newlan Reservoir (35%).
- Overall, 88 percent (85 people) of respondents indicated that they were very likely to return to White Sulphur Springs, with another 9 percent (9 people) of respondents indicating they were somewhat likely to return.

Study Implications

Respondents were mostly in the area for vacation, recreation, or pleasure, but in terms of activities, many were involved in scenic driving, camping, fishing, hiking, and wildlife watching. These are good indicators of an outdoor recreation visitor to White Sulphur Springs which is a good segment to continue to serve. In addition, visitors wrote that White Sulphur Springs was beautiful, clean, friendly, and quiet, which, along with the attraction the Hot Springs provide, are excellent marketing topics for the area. If White Sulphur Springs were able to meet the demands of those visitors while maintaining their relaxing, quiet and less crowded charm it might encourage these active travelers to stay a bit longer in town or visit at a more frequent rate. It is recommended that the citizens of White Sulphur Springs review the respondents' comments from Appendix B to gain more insight into people's likes and dislikes of White Sulphur Springs.

Introduction

White Sulphur Springs, Montana was named after the mineralized hot springs within the town limits and which is now a tourist attraction. White Sulphur is the gateway to fishing on the Smith River (by permit only), home to "the Castle" mansion and the weathered homes and outbuildings of the ghost town of Castle. This community sits in the heart of excellent hunting country and is an anchor community for the Kings Hill Scenic Byway, a 71-mile picturesque drive.

The purpose of this study was to provide an understanding of the characteristics of visitors to White Sulphur Springs, visitor spending in White Sulphur Springs, and levels of satisfaction with different aspects of visiting the area.

Methods

A community leader of White Sulphur Springs took on the responsibility to coordinate the survey efforts with the Institute for Tourism and Recreation Research (ITRR). The survey instrument was designed cooperatively with White Sulphur Springs, printed by ITRR, and distributed in White Sulphur Springs by the community coordinator. Surveys were provided to the Branding Iron Café, Two Bassett Brewery, All Seasons Inn, Spa Hot Springs Motel, Tenderfoot Motel, Montana Road House, Stockman Bar, and Snook's Diner. Surveys were dispersed from June through September 2018. One hundred and four completed surveys were obtained. No documentation of the number of refusals was recorded.

Limitations

As in all research, there are limitations to the study. Limitations for the White Sulphur Springs study included the dependence on business owners to ask visitors to complete the survey. Business owners are busy and distributing surveys is not their main focus, therefore a random sampling did not occur. In addition, ITRR personnel were not present during the data collection for quality control.

Results

Of the 104 valid responses to the residence questions, 55 percent (57 people) were from Montana and 45 percent (47 people) were from out-of-state (see Tables 1 and 2). Of all Montana respondents, 4 percent (2 people) were from Meagher County while 96 percent (55 people) were from other Montana counties. Of respondents from out-of-state, 12 percent (5 people) were from Washington, California, and Canada, respectively (see Table 2).

Table 1: Residence of all Respondents

Place of Residence	# of total	% of total
Meagher County	2	2%
Other MT County	55	53%
Montana=57		
U.S. State	37	36%
Canada	5	5%
International	0	0%
Unknown	5	5%
Total all Residences	104	

Table 2: Out-of-State, Canadian, and International Residences

Place of Residence	# of total
Alberta, Canada	1
Canada	4
Arizona	1
California	5
Colorado	2
Florida	3
Georgia	1
Idaho	2
Illinois	3
Iowa	1
Massachusetts	1
Michigan	2
Minnesota	3
Missouri	1
Oregon	1
South Carolina	1
Texas	2
Virginia	2
Washington	5
Wyoming	1

The mean age of respondents was 57 years old. Of those who were from outside Meagher County and responded to the survey, 91 people (91%) reported that they spent at least one night away from home. Of those nights spent away from home, the greatest percent of respondents (20%) spent one night in Montana. The mean number of nights spent in Montana was 5.89 nights. The mean number of nights spent in White Sulphur Springs was 3.60 nights. A full breakdown of nights spent as well as results of all other questions in this survey can be found in Appendix A.

Expenditures

Spending information was asked of visitors who reside outside of Meagher County. The survey asked that they report their best estimate of the total amount of money they and their family/travel group (if applicable) spent in the White Sulphur Springs area in the following categories: accommodations, restaurant or bar, groceries or snacks, gasoline, guides or outfitters, shuttles or taxis, retail goods and services, and entertainment or recreation.

Table 3 presents the expenditure data of only the non-resident respondents (those who reside outside of Meagher County) who reported spending money in the categories. The mean expenditure of those who spent money for each category can be found along with the percentage of people who reported that they spent money in that category. The last column provides the total dollars spent by those respondents in each category. The total reported expenditure for respondents who spent was \$64,704. (See the asterisked section following Table 3)

Table 3: Expenditure Data: Expenditures calculated using only non-residents (those who live outside of Meagher County) who spent.

Expenditure Category	Mean expenditures of non-residents <u>who reported that they spent money in these categories</u>	% of respondents who reported spending money in each category	Total dollars spent in each category <u>by respondents who spent</u>
Retail goods & services	\$571.97 (n=31)	30%	\$17,731.00
Restaurant/bar	\$183.13 (n=85)	83%	\$15,570.00
Hotel/motel/B&B/rental	\$290.65 (n=40)	39%	\$11,626.00
Groceries/snacks	\$154.23 (n=42)	41%	\$6,478.00
Gas	\$119.55 (n=49)	48%	\$5,858.00
Entertainment/recreation	\$166.04 (n=23)	23%	\$3,819.00
Campground	\$175.37 (n=19)	19%	\$3,332.00
Rented home/cabin/room	\$145 (n=2)	2%	\$290.00
Shuttle/Taxi	\$0 (n=0)	0%	\$0.00
TOTAL without Guide/Outfitter expenses			\$64,704.00
Guide/Outfitter**	\$45,000 (n=1)	1%	\$45,000
TOTAL including Guide/Outfitter expenses			\$109,704.00

** Since no other spending figures were recorded in the Guide/Outfitter category, ITRR was not able to determine a mean or reference for other Guide/Outfitter spending in the area. In addition, ITRR was not able to determine if the Guide/Outfitter lived within the county, which could determine whether the spending in that category were to remain in the community. Due to White Sulphur Springs' proximity to the Smith River, it is not unlikely that such spending on guides/outfitters could occur, it just cannot be stated with any level of confidence that this figure accurately represents the spending on guides/outfitters that occurs in White Sulphur Springs. Therefore in Table 3, two separate totals have been calculated that include total spending with and without the Guide/Outfitter expenses.

Appendix A- Results

Q1. Are you a resident of Montana? n=104

55% Yes 45% No (skip to Q3.)

Q2. Do you reside in Meagher County? n=57

4% Yes (Skip to Q12. on back) 96% No (Skip to Q4.)

Q3. In what state, province, or foreign country do you reside?

See Tables 1 and 2.

Q4. Is this your first time visiting White Sulphur Springs? n=99

28% Yes 72% No

Q5. What reasons are you visiting the White Sulphur Springs area? (Check all that apply.) n=100

73% Vacation/recreation/pleasure 18% Just passing through 8% Business/convention/meeting

20% Visiting friends/relatives 3% Shopping

Q6. For this trip, how many nights will you spend away from home? n=100, mean=6.22

9% 0 (Skip to Q.10)	17% 1	7% 3	2% 5	3% 7	3% 9
	17% 2	2% 4	1% 6	6% 8	33% 10 or more

Q7. How many of those nights are in Montana? n=87, mean=5.89

1% 0	18% 2	9% 4	3% 6	3% 8	26% 10 or more
20% 1	10% 3	3% 5	3% 7	1% 9	

Q8. Of your nights in Montana, how many will you stay in White Sulphur Springs on this trip? n=88, mean=3.60

18% 0 (Go to Q.10)	30% 1	7% 3	2% 5	1% 7	0% 9
	24% 2	5% 4	2% 6	1% 8	10% 10 or more

Q9. While in White Sulphur Springs in which types of accommodation(s) did you stay ON THIS TRIP? (Check all that apply.) n=76

54% Hotel/motel/B&B	24% Private campground	0% Resort/condominium
3% Rental cabin/home	11% Home of friend/relative	0% Guest ranch
8% Public land camping	1% Second home/cabin/condo	5% Vehicle in parking lot

Q10. Please enter your best estimate of the TOTAL amount of money in US dollars you (and your family/travel group, if applicable) spent/will spend in White Sulphur Springs on THIS TRIP. If you did not spend money in a category, please leave it blank. (See Table 3 for expenditures)

ACCOMMODATIONS in White Sulphur Springs

Hotel/motel/bed & breakfast

\$

Campground

\$

Rented home/cabin or room

\$

FOOD in White Sulphur Springs

Restaurant/bar

\$

Groceries/snacks

\$

TRANSPORTATION in White Sulphur Springs

Gasoline/diesel

\$

Shuttle/taxi

\$

RETAIL/SERVICES in White Sulphur Springs

Retail goods/services

\$

Entertainment/recreation

\$

Guide/outfitting trip

\$

Q11. How many people does the above spending represent (including yourself, i.e., your travel group/family size)? n=100; mean= 2.65

8% 1	5% 3	8% 5	1% 7	0% 9	1% more than 10
67% 2	7% 4	2% 6	0% 8	1% 10	

Q12. What option best describes your travel group? n=98

9% Self	16% Immediate family	8% Family/friends	2% Business associates
51% Couple	8% Extended family	4% Friends	1% Organized group/club

Q13. Please select all the ages represented in your group: n=101 for each age category

4% 0-5 yrs.	9% 11-17 yrs.	12% 25-34 yrs.	24% 45-54 yrs.	37% 65-74 yrs.
5% 6-10 yrs.	7% 18-24 yrs.	17% 35-44 yrs.	47% 55-64 yrs.	14% 75 and over

Q14. How long before this trip did you make plans to spend time in White Sulphur Springs? n=91

18% The day I arrived	17% 1-4 weeks before arriving	18% Over 6 months before arriving
34% 1-7 days before arriving	14% 1-6 months before arriving	

Q15. Please select the option that best corresponds with your level of agreement with each statement below.

I visit White Sulphur Springs because it has or is....	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree	Mean	Total respondents
Relaxing	2%	0%	10%	17%	71%	4.54	n=83
A scenic drive	2%	4%	12%	20%	63%	4.37	n=86
Less crowded	4%	3%	15%	13%	66%	4.35	n=85
Quiet	5%	1%	15%	17%	62%	4.29	n=79
A charming small town	5%	1%	14%	25%	55%	4.24	n=80
Close to attractions I'm visiting	13%	4%	18%	9%	56%	3.91	n=77
Outdoor Recreation	9%	10%	20%	17%	45%	3.80	n=71
A vibrant small town	7%	7%	32%	17%	37%	3.72	n=75
Close to public lands	13%	8%	19%	18%	42%	3.67	n=67
On my route	21%	11%	9%	9%	50%	3.57	n=76
Special places to eat	22%	17%	23%	17%	20%	2.97	n=69
Where family/friends live	50%	12%	5%	6%	27%	2.48	n=66
Shopping	48%	16%	22%	5%	9%	2.10	n=67

Q16. On this trip as well as past visits, what places have you visited in the White Sulphur Springs area (check all that apply). n=104 (Top 5 highlighted)

67% Spa Hot Springs 29% Bair Museum 20% Martinsdale Reservoir 33% Kings Hill Scenic route
 35% Newlan Reservoir 10% Gypsy Lake 0% Ranch vacation 13% Bair Reservoir
 21% Showdown Ski area 36% Castle Museum 14% Sutherlin Reservoir 11% Strand theater
 16% July 4th festivities 6% Art & Cultural Trail 14% Labor Day Rodeo 15% Red Ants Pants Festival

Q17. On this as well as past trips, what activities have you participated in during your visit to the White Sulphur Springs area (check all that apply). n=104 (Top 5 highlighted)

40% Camping 1% Guided trip 14% Bird watching 3% XC skiing/snowshoeing
 23% Hiking 15% Hunting 3% Canoe/kayaking 9% Downhill skiing
 25% Fishing 2% Bicycle touring 5% Motorboating 9% Golfing
 7% OHV/ATV riding 14% Motorcycle touring 50% Scenic driving 2% Gold panning
 2% Horseback Riding 23% Wildlife watching 4% Snowmobiling

Q18. What is your age? n=91; Range=24-82, mean=56.77

Q19. What is your gender? n=96 45% Male 55% Female

Q20. How likely are you to visit White Sulphur Springs again? n=97

88% Very likely 9% Somewhat likely 3% Unlikely

Q21. Please tell us what you liked about White Sulphur Springs.

See Appendix B

Q22. Please tell us what you did not like about White Sulphur Springs.

See Appendix B

Appendix B: Open-ended Responses

Q21. Please tell us what you liked about White Sulphur Springs.

2 Basset
2 Basset Brewery.
2 Basset. Rooney's Hardware
Always love the springs, been here annually for 16 years, Food at Barneding Iron service great.
Bar 47 - great food w/ many options. SPA HOT SPRINGS!!! Reason we came! Haugan Express - Great food.
Bar 47! Amazing
Been coming since was 4 years old, it's part of my life
Beautiful drive from Bozeman. Great views at a very clean campground. Friendly campground owner. Loved your 2 Basset Brewery and Red Ants Pants store
Central to a lot of things. Great place to set up a home base to see everything.
Cheap camping. Nice people. Great church (Mountain view community). Quiet and relaxing. 4th of July parade was great
cheeseburger @ Snook's
Come for Red Ants Pants - the people are fabulous - excellent organization
Community
Everything! Nice town
Friendly and good food.
Friendly people
Friendly people
Friendly people - Not Crowded - Easy to get around
Friendly people, active community, interesting history and well maintained buildings with a variety of businesses. Conestoga Campground, Berg's Garage, Castle, Bair Museum all are favorites!
Friendly people, fun places to hang out
Friendly people, you can find just about anything you need. If you need some things, somebody here has it, can get it, or do it. Nice christian people, too.
Friendly restaurant service.
Friendly, small, affordable, good food in town - only 4 hour drive from home
Friendly, welcoming community, opportunity to see friends and family
Good scenery, friendly helpful people
Great brewery, friendly people all around , great small MT town
Great hot springs and brewery
Great little town! Very friendly
Great MT town!
Great place to have a reunion
Great quiet little town, friendly people
Great restaurants!
Great rodeo committee
Hot springs and the very nice people. The fireworks were great, also!
Hot Springs SPA
Hot Springs, eating. Atmosphere
Hot springs, good bars, very nice people. Beautiful location
Hot Springs. Bar & restaurants. Location
Hot Springs. Brewery. Stockman Grill
Hot water at the spa

I come for the water
I like it here because of the quiet town atmosphere, the down home MT folks. Just about everything in general.
I love coming here to relax, sit in the hot water, enjoy the brewery.
I've come to relax at the Hot Springs
Love it all
Low crime, scenery of mountains
Nice little town
Nice quiet town!
Nice small town, people friendly
Nice small town. Love the Hot Springs
People
Quaint little town, friendly people and family lives here
Quaint western vibe
Quality of the healing water at the Hot Springs. Castle Museum and the friendly people
Quiet - small - lots of outdoor stuff to do
Quiet, good water, good food.
Quiet, relaxing
Scenic, nice friendly people, good food, good place to stop
Sense of community, RAP festival, friendly people, beautiful sky country
Small & quiet
Small town character, nice people, hot springs.
Small unreal place to stop at road of long motorcycle ride
Small. Soak at spa. Cafe is good
Spa Hot Springs - Great Relaxing
Spa Hot Springs, parades, festival labor day rodeo. Scenic drives. Brewery.
Spa is amazing. Prices are very reasonable. Feel so much more relaxed now
Staf fand owners @ Spa & Stockmans
Summer events and festival scenic views; drives, avenue of flags
That they're aren't that many people. The hot springs and public land/hunting opportunities, as well as camping.
The brewery !
The Brewery !
The Brewery, the hot spring , the citizens
The hot springs
The hot springs
The Montana Roadhouse is great!
The owners are great. The host are great
The people are friendly
The people. Red Ants Pants Festival - Always - 8 Year attendee! The improvements that have been made.
The small town atmosphere and friendly people
The spa RAPMF
Unspoiled compared to Bozeman
Very friendly little town
Very friendly people at the Branding Iron
Very friendly people!
Visiting and touring the Springdale Colony complex. Very impressive. Quiet little town, good restaurants. Wonderful well kept up Conestoga campground

We like everything. The mineral springs are the main reason we come. Like the casual welcoming feeling we have when we are here.
We like the relaxing spa, the nice folks and the good beer. And the beauty!
We love the scenery. We love the campground & owners. We would love it better without the smoke. We enjoy the animals and quiet and awesome friendly people. Also, the temperature usually.
White SS is always a great time. Easy drive from home and we usually get groceries when we're here. Soak, eat, shop, maybe get a drink. Float the river!
Wonderful community...getting busier and busier each passing year tough.

Q22. Please tell us what you did not like about White Sulphur Springs.

A long way from shopping. Eating out was expensive
All restaurant prices are, what we call "pricey".
All season Inn Hotel : very expensive (\$50 for two chihuahuas). On the way back will stay at Great Falls - (less expensive).
Can't think of anything
Conservative vibe
Empty storefronts
Good movies showing MORE often. Rough roads!!
Growth of deer population in city limits of WSS
Haven't seen a thing to not like
Higher prices in grocery stores, but I live in Denver so that is to be expected
Hot springs facility needs refurbishing. RV park would be a nice inclusion.
Hundreds of campers come into Conestoga Campground from Federal Highway 12/89 via Folsom Street. Folsom street is littered with massive pot holes. Conestoga campers bring an enormous amount of revenue to this town. The least the city could do is repair those pot holes.
I did not bring my puppy or find biscuits and gravy
I would like more shops, local artisans too far from where we live.
junky residential
Limited food options, limited retail and cultural options.
Looking forward to returning once your remodel is finished. Hope bathrooms get upgraded as well.
Love that you are remodeling
Loved it!
More attractive/updated building for your Hot Springs SPA.
More shopping - antique
Mosquitoes
Mosquitoes - But that's a mother nature? You have a wonderful community, Thank You!
N/A
N/A
NA
NA
Need for walking paths for community
Need more shopping (Antiques, second hand store)
No cell service

No Complaints
None...yes!
Not much a variety of shopping/eating facilities
Not sure if that's good or bad, good for local economy, the reservoirs and campsites are super crowded though. (Still better than anywhere in the Gallatin Valley.)
Nothing
Nothing
Nothing
Nothing
Nothing
Nothing it sure Beats Seattle
Nothing that we did not like.
Nothing!
out of the way
Potholes
Price of groceries
Small town gossip
Some of the cluttered yards and run down property.
Spa and restaurants and bars close too early.
The cost of things But I live in Denver so rural areas tend to be more expensive.
The only thing would be that we wish there was more access to the hot springs.
The pro mine movement, will ruin WSS in the long run
The semis speeding through town!
There is nothing I did NOT like.
Too many mosquitoes, but that doesn't prevent us from coming back.
Too far from home
Too few gas station
Waitress attitude at Dori's

Appendix C: Letter to White Sulphur Springs Business Owners

INSTITUTE FOR TOURISM & RECREATION RESEARCH

To: White Sulphur Springs business owners

From: Norma Nickerson, Director, Institute for Tourism and Recreation Research

RE: White Sulphur Springs visitor survey

Date: 6/19/18

The Institute for Tourism and Recreation Research (ITRR) was approved by the Governor's Tourism Advisory Council to utilize our survey kit for five small towns in Montana. White Sulphur Springs, through the efforts of the community coordinator, has been selected to participate in this project. The other communities participating in the project are Lima, Deer Lodge, Thompson Falls, and Shelby. The purpose of the project is to assist five small communities with their visitor data through conducting the survey kit customized to their community.

Objectives

To assist communities in understanding their local visitor by waiving the \$700 fee for up to five communities;

- To understand the visitor demographics, trip characteristics, activities, attractions to the community, and visitor planning time frame, and;
- To assess the spending patterns of visitors to the community.

The survey kit is conducted as follows:

1. ITRR develops the survey instrument template
2. ITRR works with a community leader to determine the survey methods best suited for the community
3. ITRR prints ~200 surveys and mails them to the community leader
4. The community collects the data based on the methods and time frame chosen
5. Upon completion of data collection, surveys are mailed back to ITRR
6. ITRR conducts data entry, analysis, and report for the community

After discussion with the community coordinator, we decided the most efficient and useful way to collect data is to ask accommodation owners (motels, cabins, rented rooms, campgrounds) to assist by asking each guest all summer long and possibly through September, to complete the questionnaire before they leave White Sulphur Springs. In addition, one or two restaurants in town could ask patrons to complete the survey while waiting for their meal (but these folks cannot reside in Meagher County). Finally, if time allows for some community members to survey visitors at other attractions like the museum or hot springs, that could give us an idea of who stops in town, but doesn't necessarily spend the night.

We ask that the business owners provide their 'blessing' and passion for this study. It can only be successful if everyone is on board and persistent throughout the summer in data collection.

The resulting data will provide White Sulphur Springs with information about their visitor behavior which can ultimately assist the community in economic development. If you have questions, please call or email me at: 406-243-2328; norma.nickerson@umontana.edu.

Thank you!



Institute for Tourism & Recreation Research - 32 Campus Dr. #1234 - University of Montana - Missoula, MT 59812

*****All community member names have been changed for purposes of anonymity*****