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Montana Poll:

Resident Attitudes toward Tourism

1992 - 2008

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Introduction

In each of the past three strategic plans for Montana's Travel and Tourism Industry, one goal has been to understand and then facilitate improved attitudes toward tourism in the state. Specifically, Montana's 2008-2012 Strategic Plan for Tourism and Recreation, Objective 10.5.c. says: "Continue regular monitoring of Montanans' opinions about tourism and recreation." This objective has a high priority designation. The Institute for Tourism and Recreation Research (ITRR) has contributed to the understanding of resident attitudes by polling Montana residents about their attitudes and opinions regarding tourism since 1991.

In 1991, ITRR commissioned the Bureau of Business and Economic Research (BBER) at The University of Montana to add three tourism-related questions to their annual poll of Montana residents. The Montana Poll is a telephone survey of approximately 400 Montana residents. The method of random digit dialing was used to assure a random sample of Montana residents for each poll. The 1991 Montana Poll was conducted in August, while the 1992 poll was conducted in December. During 1993, 1994, and 1995, polling was conducted in May, September, and December. Following the 1995 polls, December was chosen as the best time to ask tourism-related questions because it resulted in the most objective answers. In May, residents appeared to respond to questions in a more positive manner, perhaps due to the lack of visitors seen during the preceding months. In September, respondents may have been weary of visitors from the summer tourism season, and those feelings could have biased the responses negatively. Therefore, polling was conducted in December each year beginning in 1996 as it represented the most unbiased timeframe to ask tourism questions. Since the tourism questions were asked in August of 1991, those responses have been excluded so that the timing of the questions is constant over the polling years.

The three questions asked relate to resident perceptions of tourism and attitudes or opinions about tourism in the state. The questions chosen for use in the poll were a result of numerous statewide mail-back surveys conducted in the early 1990s which showed that these three questions represented overall attitudes (benefits question), overall affects of tourism on residents (quality of life question), and a concern that tourism was a cause of feeling crowded (overcrowding question). Because of the universal appeal of the three questions and the need to monitor year-to-year sentiments, these three questions have remained the same in content, collection time period, and methodology for the past 17 years.

Results

Residents were asked their level of agreement or disagreement with three statements. Responses were recorded on a five-point Likert scale ranging from -2 (strongly disagree) to 0 (unsure) to +2 (strongly agree). A score of -1 or -2 is interpreted as disagreement, and a score of +1 or +2 is interpreted as agreement. The following section outlines the average responses of participants from 1992 to 2008. Figures 1, 2, and 3 provide a graphical illustration of mean responses to each statement. Tables 1, 2, and 3, at the end of this report provide the percent of responses within each of the five scaled items per question.

#1: The overall benefits of tourism outweigh the negative impacts.

Responses to this statement have remained relatively constant over 17 years except for the noticeable downturn in 2001 (Figure 1). It appears the aftermath of the terrorist attacks in September, 2001 remained with Montana residents in December of that year, but by December 2002, those concerns changed and attitudes reverted back to previous levels. However, even with the slight dip in 2001, residents of Montana have consistently indicated that the benefits of tourism do outweigh the negatives. The mean response has remained close to one.

A further analysis of the individual scale responses (Table 1) shows that close to 20 percent or one-fifth of Montana residents have consistently felt that the negative impacts of tourism are worse than the positive impacts. While this is only one-fifth of the population, if these people happen to be a loud minority, it may appear that more of the population agrees with this sentiment than actually do agree. Further research such as in-depth interviews of people with this sentiment might reveal the meaning behind their negative response.

#2: If tourism increases in Montana, the overall quality of life for Montana residents will improve.

The mean response on this question tends to point to a population who are unsure about whether or not tourism does help their quality of life (Figure 2). However, after the September 11th terrorist attacks in 2001, residents of Montana were more likely to agree that tourism does improve their quality of life. In fact, only in 1992 is the mean response to this question similar to the means after September, 2001. What is going on? First of all, the terrorist attacks directly affected the travel industry. People around the country were not able to fly for a few days, and then were a bit skeptical about flying. It was probably at that point when residents realized the relationship between their abilities to fly and a vacation. Vacations are directly related to well-being and hence quality of life. Therefore, the tragedy of September 11, 2001 could easily have provided the link between tourism and quality of life.

Looking further at this question (Table 2), it shows that residents are more polarized regarding opinions about tourism and quality of life. Except for 2001, at least 30 percent of all residents do not believe that increases in tourism will increase their quality of life. While 60 percent do believe this to be the case, it still is not a clear-cut endorsement of tourism. Policy makers and tourism planners should be aware that there is some polarization of opinions regarding tourism's influence on quality of life even though the majority, (over 50%), agree with the statement.

#3: In recent years, the state is becoming overcrowded because of more tourists.

This survey question has had interesting results over the 17 year time span. The mean responses show a population who disagree with this statement (Figure 3). However, from 2000 forward, the disagreement intensified showing that residents do not point to the tourism industry as the reason for the state being crowded. Table 3 shows that there is still approximately one-quarter of the population who feel that the state is becoming overcrowded due to tourism, but this represents a substantial drop from 1995 where 50 percent of Montana residents said the state is overcrowded because of tourists. Although Montana generally experiences steady growth in nonresident visitation each year (about 2% annually), residents do not feel the state is becoming overcrowded as a result of that visitation. It will be interesting to see if the strength of disagreement increases after the 2008 decline and 2009 expected decline in nonresident visitation is felt by residents.

Figure 1: Overall Benefits of Tourism Outweigh the Negative Impacts

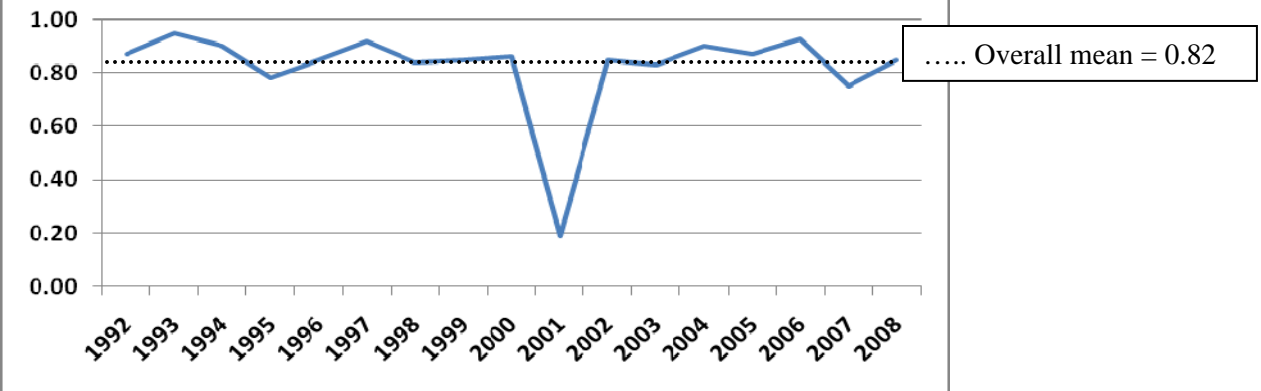


Figure 2: If Tourism Increases, QOL of Residents will Improve

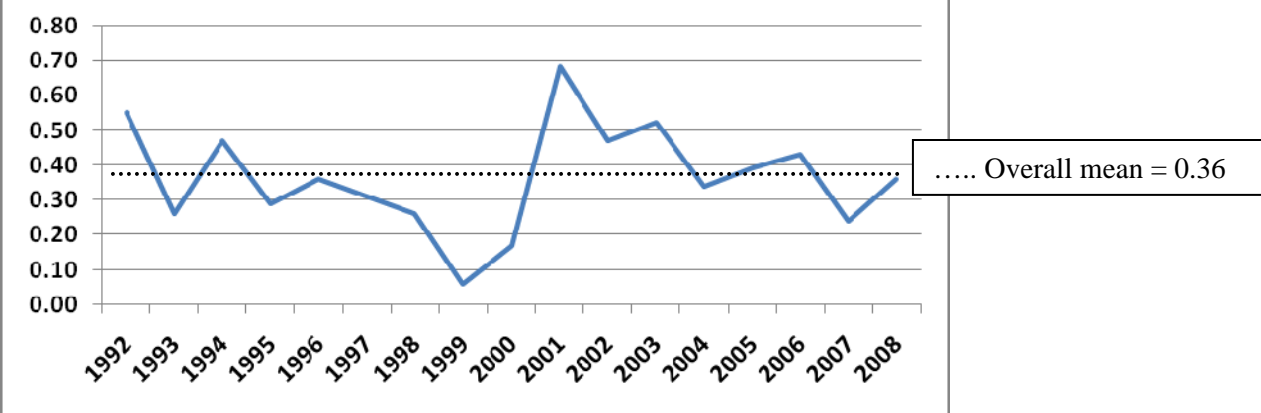
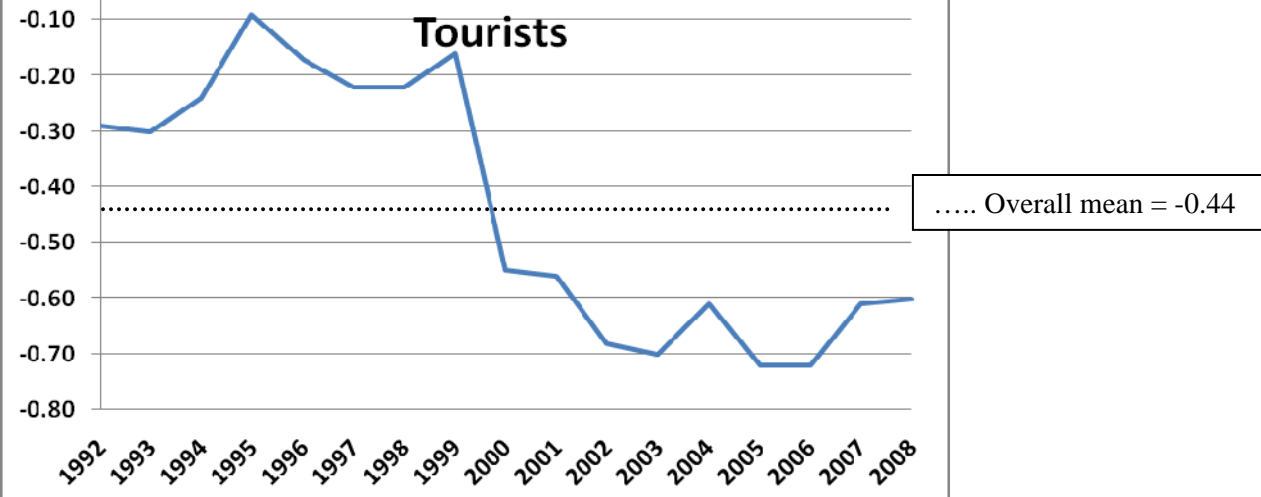


Figure 3: The State is Becoming Overcrowded Because of More Tourists



Summary, Implications, and Recommendations

Summary

The longitudinal attitudes of residents toward tourism do not create any need for concerns about the tourism industry in Montana.

1. Residents do feel that the overall benefits of tourism outweigh the negative impacts. The range of agreement only varies by 0.2 in 17 years of data collection. The variation in 2001 was simply a slight hesitation reported by residents perhaps in response to 9/11. The overall mean of 0.82 with '2' the highest possible response suggests that residents have always felt benefits outweigh negatives. Another way to look at the data for the most recent year, 2008, shows that 74 percent of Montana residents agree that the overall benefits of tourism outweigh the negative impacts.
2. There is slightly more variation in residents' belief that as tourism increases, quality of life for residents will improve. The range spread from a low of 0.06 to a high of 0.68 with an overall mean of 0.36. All the responses were on the positive side indicating that the majority of Montana residents can personally see how increased tourism is good for their quality of life. Sixty percent agreed in 2008 that if tourism increases so does the overall quality of life for Montana residents.
3. In 2008 sixty-eight percent of residents did not think that the state was becoming overcrowded due to tourists. The range spread from a low of -0.72 to a high of -0.09 with an overall mean of -0.44. It is obvious from Figure 3 that residents are less threatened by overcrowding now than they were 10 to 15 years ago.

Implications

1. Industry and government groups including Travel Montana, the Montana Inn Keepers, and the Travel Industry Association of Montana have presented tourism as a positive and beneficial economic driver for the state of Montana through various promotions since 2000. There have been radio, television, and newspaper ads depicting tourism's contribution to the state. These promotions may be part of the reason for the increase in the positive attitudes. Also, after 9/11, Travel Montana has been visible in the state through their advertisements on the television suggesting residents to "stay and play" in their back yard. Perhaps recommending that residents should vacation in their own state implies that they, too, are tourists at some time and hence tourists are really not all that bad!
2. Natural disasters such as wildfires that have plagued western Montana nearly every other year since 2000 have been presented to the public as having a bad effect on the tourism industry and hence the economic well-being of the state. When these messages are continually presented to residents, they are more likely to make the connection between tourism and positive benefits.
3. The population of Montana is slowly growing. New residents are becoming common and possibly bring with them a more positive attitude toward tourism since they were likely to have been a tourist to Montana before moving here.

Recommendations

1. It is important to keep tourism in the public view as a positive economic engine and quality of life enhancement. It is recommended that key players in the tourism industry continue (or start) to make presentations to nonprofits, business leaders, elected officials, and other groups on a continual basis to keep tourism issues in the forefront. To facilitate this endeavor, a speaker's bureau could be developed by Travel Montana and made available to all possible groups in Montana. Individuals in the speaker's bureau could include some TAC members, ITRR researchers, Travel Montana program leaders, and other

knowledgeable individuals in the tourism field. The important aspect is to speak to groups who generally do not know much or think about tourism on a regular basis.

2. Continue any PSA's and other advertising of travel in Montana. The "stay in your own backyard" campaign may have enlightened residents to the fact that Montana is a tourist state and a nice place to visit for them as well as others.
3. Nonresident visitors like to talk to local people. They will ask residents about things to do and places to go. When visitors see and feel how much residents like their own state, it provides a positive "vibe" to the visitor. Usually this will, in turn, generate good will from the visitor toward the state and the people living here. When residents are proud of "hosting" others in their state, everyone benefits. It is recommended that a PSA or TV commercial be designed to remind residents how wonderful Montana is and how important they are as ambassadors for the state.

While the three attitude questions in this report do imply positive attitudes toward tourism, it is recommended that additional attitude questions be added to the statewide poll periodically to assess specific areas of the tourism attitudes. These additional questions could be extracted from the previous statewide tourism attitude mail surveys. Also, it will be important to assess the geotourism attitudes and behaviors of residents to understand if visitors and residents hold the same values in regards to sustaining Montana's environment, heritage, culture, and aesthetics.

Table 1: "The overall benefits of tourism outweigh the negative impacts"																	
	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Strongly Disagree (-2)	4%	10%	7%	10%	8%	8%	5%	6%	8%	20%	9%	9%	8%	10%	8%	12%	6%
Disagree (-1)	17%	8%	12%	12%	11%	11%	13%	10%	12%	18%	10%	10%	13%	10%	11%	11%	13%
Unsure (0)	6%	7%	6%	9%	8%	6%	10%	11%	10%	10%	6%	6%	3%	6%	4%	6%	6%
Agree (+1)	33%	29%	32%	31%	31%	32%	39%	39%	28%	27%	38%	37%	33%	33%	36%	33%	39%
Strongly Agree (+2)	40%	47%	42%	39%	41%	43%	33%	35%	43%	25%	37%	37%	43%	42%	41%	38%	35%
Mean Response	0.87	0.95	0.90	0.78	0.85	0.92	0.84	0.85	0.86	0.19	0.85	0.83	0.90	0.87	0.93	0.75	0.85
Sample Size	396	414	405	410	407	403	404	426	410	415	524	405	418	625	572	449	424

Table2: "If tourism increases in MT, the overall quality of life for MT residents will improve"																	
	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Strongly Disagree (-2)	13%	22%	11%	19%	16%	17%	12%	19%	18%	9%	14%	15%	15%	16%	14%	19%	12%
Disagree (-1)	14%	16%	22%	16%	18%	18%	22%	21%	18%	9%	18%	18%	21%	17%	18%	18%	21%
Unsure (0)	9%	5%	4%	9%	8%	6%	13%	13%	15%	9%	8%	7%	4%	5%	4%	5%	7%
Agree (+1)	31%	25%	37%	31%	32%	33%	37%	29%	28%	51%	25%	22%	32%	36%	40%	35%	39%
Strongly Agree (+2)	32%	31%	27%	26%	26%	25%	17%	18%	22%	22%	34%	38%	27%	26%	24%	23%	21%
Mean Response	0.55	0.26	0.47	0.29	0.36	0.31	0.26	0.06	0.17	0.68	0.47	0.52	0.34	0.39	0.43	0.24	0.36
Sample Size	396	414	405	410	409	398	404	425	410	415	524	405	418	636	581	455	424

Table3: "In recent years, the state is becoming overcrowded because of more tourists"																	
	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Strongly Disagree (-2)	25%	34%	28%	21%	27%	22%	18%	21%	33%	37%	42%	38%	39%	38%	36%	35%	27%
Disagree (-1)	34%	23%	27%	24%	24%	33%	32%	31%	32%	27%	28%	34%	27%	33%	35%	32%	41%
Unsure (0)	3%	5%	3%	5%	7%	6%	14%	8%	7%	5%	4%	2%	3%	2%	1%	5%	5%
Agree (+1)	21%	15%	26%	25%	20%	25%	25%	24%	15%	15%	12%	12%	20%	16%	18%	16%	19%
Strongly Agree (+2)	17%	23%	16%	25%	21%	14%	11%	16%	14%	15%	16%	14%	11%	11%	10%	12%	8%
Mean Response	-0.29	-0.30	-0.24	-0.09	-0.17	-0.22	-0.22	-0.16	-0.55	-0.56	-0.68	-0.70	-0.61	-0.72	-0.72	-0.61	-0.60
Sample Size	396	414	405	410	409	404	404	426	410	415	524	405	418	641	581	455	424