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Montana Poll: 1992-2009 Resident's Attitudes Toward Tourism & 2009 Resident Prioritites

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Montana Poll:

1992 – 2009 Resident’s Attitudes Toward Tourism & 2009 Resident Priorities Related to MT Charter

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SECTION 1: MONTANA POLL - RESIDENT ATTITUDES TOWARD TOURISM 1992 - 2009

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 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 effects 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 18 years.

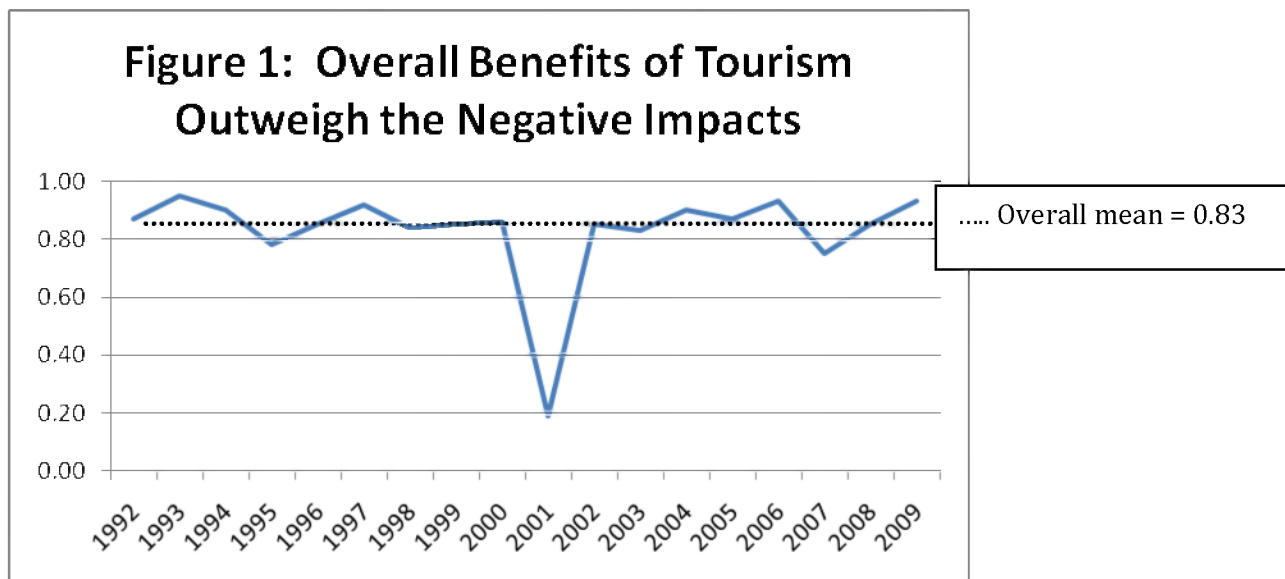
RESULTS: 3 ATTITUDE QUESTIONS

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 2009. 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 18 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. Only in 1993 was the mean slightly higher than the 2009 attitudes, suggesting that the current recession has residents agreeing slightly more that tourism is a good thing for Montana. Overall, however, the mean response has remained close to one.

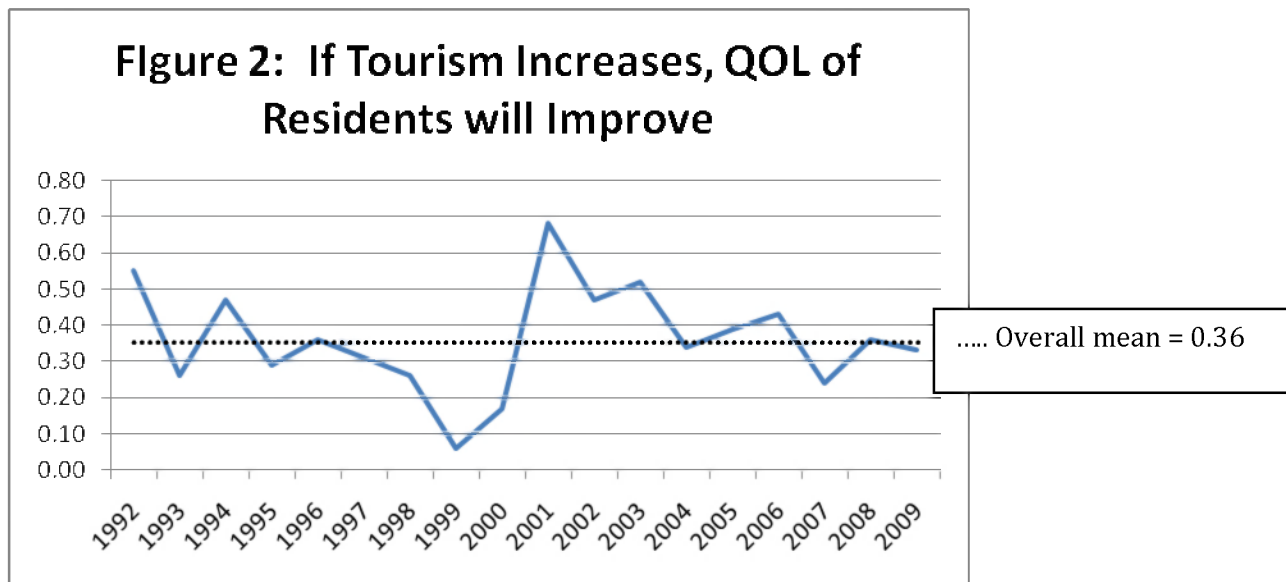
A further analysis of the individual scale responses (Table 1) shows that close to 20 percent, or one-fifth, of Montana residents have consistently felt that the negative impacts of tourism are greater than the positive impacts. While this is only one-fifth of the population, if these people happen to 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 to this statement 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 was 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 brought to light the link between tourism and quality of life.

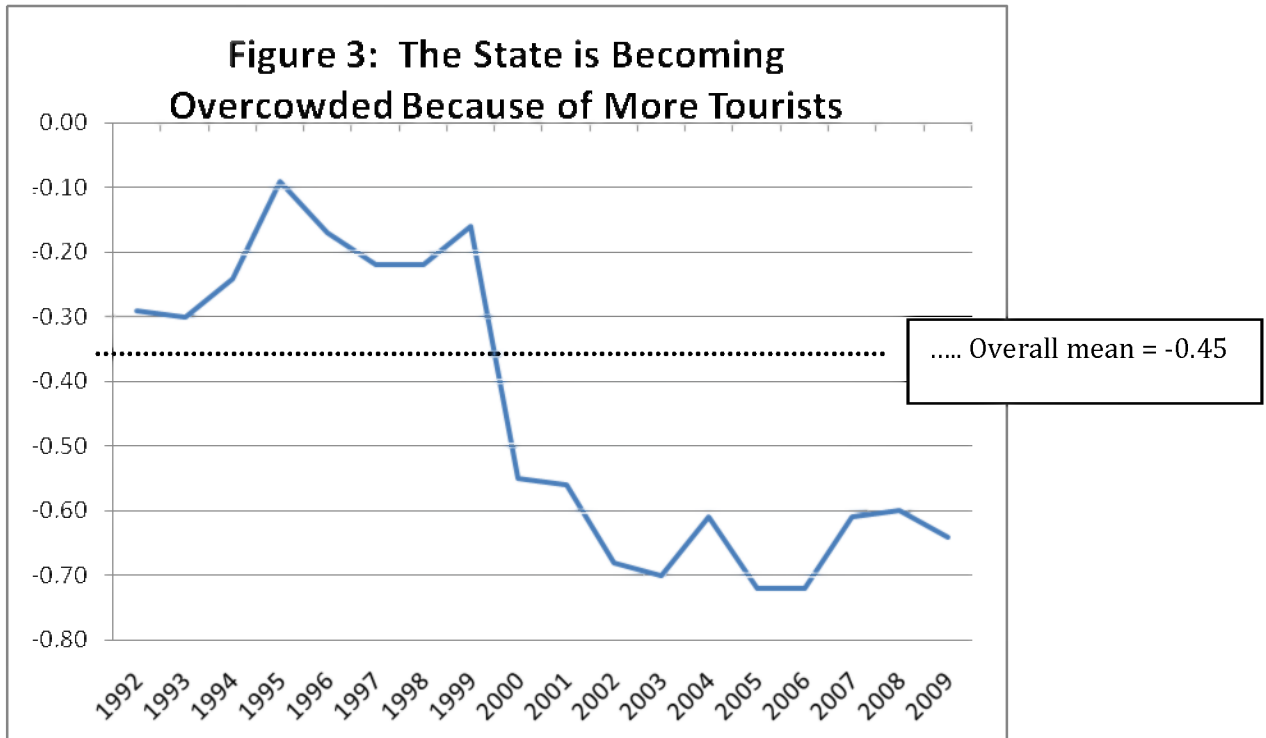
Looking further at this question (Table 2), it shows that residents are more polarized regarding opinions about tourism and quality of life. Except for 2001, at least 30 percent of all residents did not believe that increases in tourism would increase their quality of life. While 60 percent did believe 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 18 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. In Table 3 it shows 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), the past two years, 2008 and 2009, showed a decline in visitation numbers. In 2008, gas prices hit the \$4 mark and travel was reduced. In 2009, the recession was in full bloom causing travel plans to be halted or altered in time and distance. Through the years, however, data show that residents do not feel the state is becoming overcrowded as a result of visitation.



SECTION 2: MONTANA RESIDENTS' SUGGESTED PRIORITIES FOR THE TOURISM INDUSTRY

In 2007, Montana's Tourism Advisory Council drafted, reviewed and adopted a Montana Tourism and Recreation Charter as part of their participation in the development of the Montana Tourism & Recreation Strategic Plan 2008-2012.

The goal of the Montana Tourism and Recreation Charter is to "maintain the integrity of place" and the uniqueness of Montana through geotourism, by providing "products, services and visitor experiences that maintain a destination's sense of place and complement rather than compete with the needs of local residents" (<http://www.travelmontana.org/charter> 2007). Numerous cities, regions, travel organizations, agencies, and convention and visitor bureaus throughout the state have ratified the charter. Accordingly, these groups will be able to identify the visitors who resonate with the values of geotourism and will then be able to reinforce these values via tourism promotion. In this sense, geotourism is able to provide a more consumer-driven approach to product development and destination management than other forms of sustainable tourism.

Geotourism in Montana is based on the values residents of Montana hold toward Montana. The Charter recognizes the tourism industry's role in helping to preserve and maintain those values rather than ignoring them when inviting visitors to the state. Therefore, the purpose of this section of the study was to expand the annual 3-question telephone survey related to social attitudes toward tourism to include questions related to resident feelings toward the MT Tourism Charter principles.

The Montana Poll, conducted by the Bureau of Business and Economic Research each December, uses random digit dialing to assure a random sample of Montana residents. Because it is a telephone survey and these questions were added to an existing survey, the number of questions asked was limited to seven so as to not be a burden on the respondent.

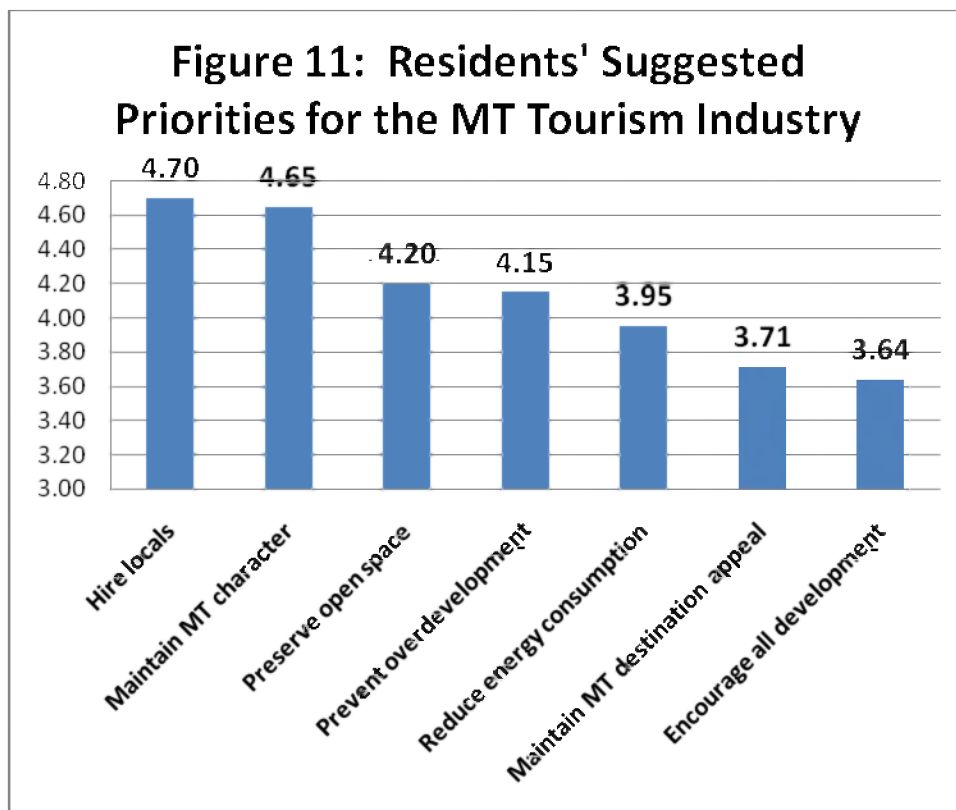
ITRR personnel reviewed the charter and determined that questions related to three of the eight charter principles would be most appropriate for this survey. These three principles were:

- Maintain integrity of place and destination appeal
- Promote sustainable resource conservation, including conservation of energy, water, and wildlife
- Participate in and help lead community stewardship partnerships to maintain Montana assets.

Since the TAC and numerous agencies and businesses around the state have adopted the charter, the question remains: What do residents feel the tourism industry should prioritize in relation to the charter principles? The following seven questions asked of Montana residents provide insight into residents' attitudes with regards to the tourism industry's role in maintaining Montana's sense of place.

RESULTS: 7 PRIORITY QUESTIONS

Results of the seven questions show that residents support the tourism industry's efforts as related to the Tourism Charter. On a 5-point scale with five being a very high priority and one a very low priority, all of the questions had a mean above the medium priority. Figure 11 shows the means for each question from highest to lowest. The top two priorities received means closer to the very high priority mark: Hiring local people (mean=4.70) and maintain the Montana character (mean=4.65).



Scale: 5 = very high priority; 4 = somewhat high priority; 3 = medium priority; 2 = somewhat low priority; 1 = very low priority

It is useful to look at the dispersion of responses in addition to the mean to determine if there are a significant number of residents who disagree while a significant number agree to a particular question. If that were the case, the mean would tend to be in the middle range indicating a medium priority overall which would be deceptive. Results would actually show that residents are split on that particular question. Figures 4-10 show the responses for each individual question. Two questions, "How high a priority is it that the Montana tourism industry help maintain Montana's destination appeal," and "How high a priority is it that the Montana tourism industry encourage all types of tourism development," received more response at the somewhat high priority level than the very high priority level. All the other questions received more responses at the very high priority level.

Figure 4: "How high a priority is it that the MT tourism industry help maintain Montana's destination appeal?"

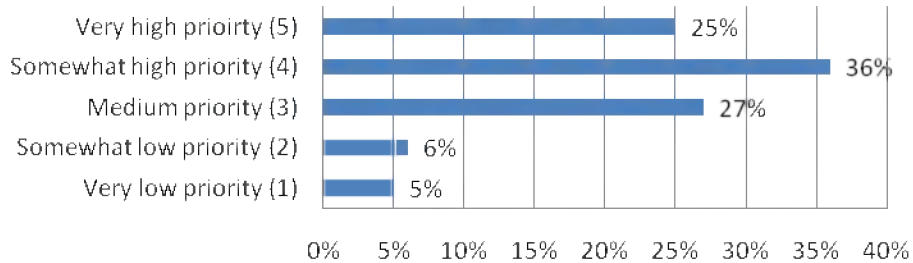


Figure 5: "How high a priority is it that the MT tourism industry strive to hire local people?"

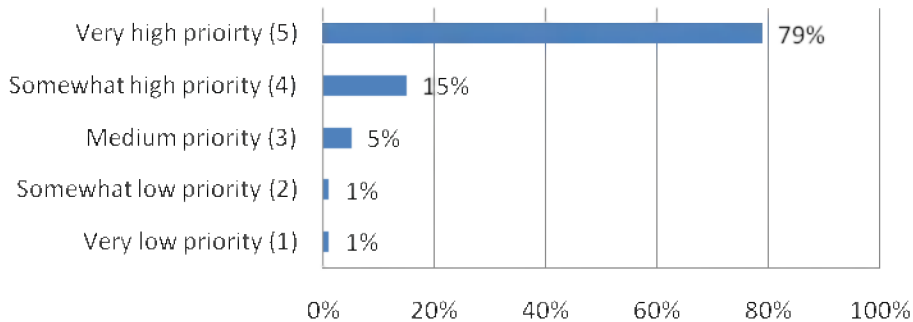


Figure 6: "How high a priority is it that the MT tourism industry promote the preservation of open space?"

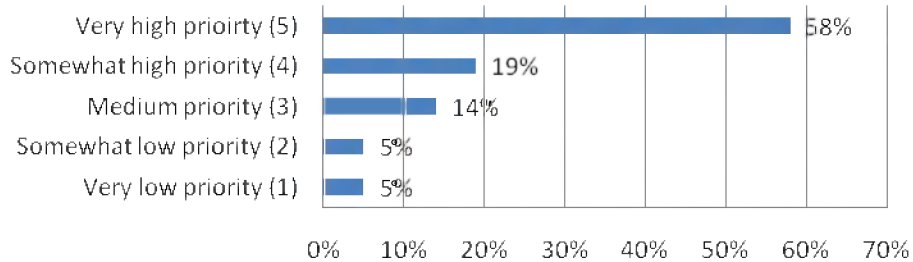


Figure 7: "How high a priority is it that the MT tourism industry help prevent overdevelopment if it is against community values?"

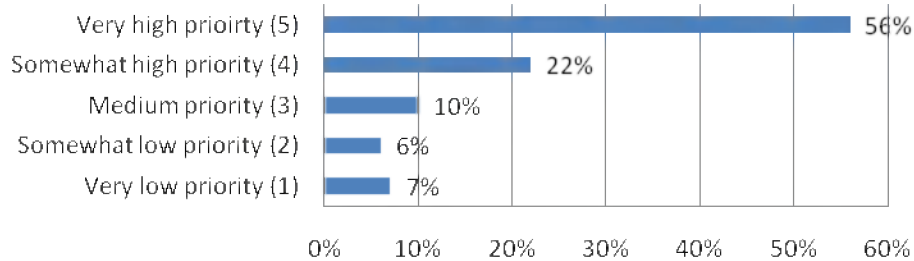


Figure 8: "How high a priority is it that the MT tourism industry maintain the character of Montana?"

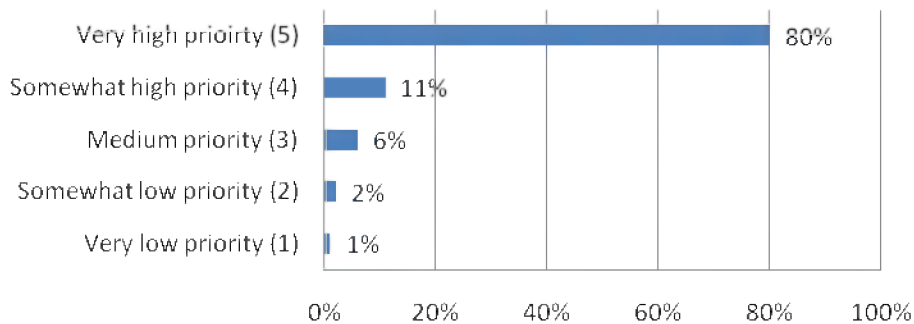


Figure 9: "How high a priority is it that the MT tourism industry encourage all types of tourism development?"

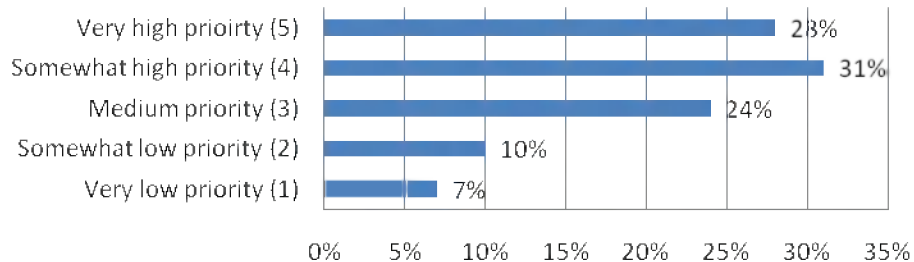
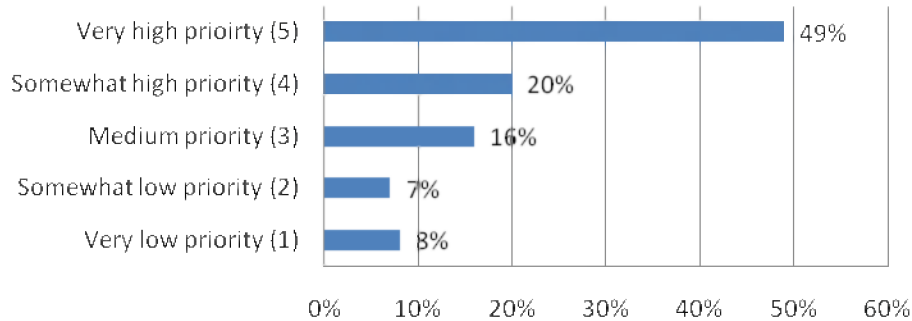


Figure 10: How high a priority is it that the MT tourism industry strive to reduce energy consumption?



SUMMARY, IMPLICATIONS, AND RECOMMENDATIONS

Summary – 3 Question Resident Attitudes

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 varied by 0.76 in 18 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 0.83 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, 2009, shows that 77 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-one percent agreed in 2009 that if tourism increases, so does the overall quality of life for Montana residents.
3. In 2009, 68 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.

Summary – 7 Priorities Question

In reviewing the answers within each of the seven questions, 80 percent of the respondents believe maintaining the character of Montana is a very high priority while another 79 percent said hiring local people is a very high priority. This overall agreement by residents for these two issues should provide the Montana tourism industry with direction in terms of tourism development and management. On the other end of the scale, residents were mixed when answering the question, “How high a priority is it that the Montana tourism industry encourage all types of tourism development?” While the majority (59%) said it was a somewhat or very high priority, this statement received the highest number of residents indicating it was medium to low priority. It appears that many residents (41%) would like the tourism industry to move forward with caution when encouraging tourism development. This seems to fit with the overall goals of the Montana Tourism Charter.

Implications

1. Industry and government groups around the state 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, the Office of Tourism (previously Travel Montana) has been visible in the state through their previous advertisements on the television suggesting residents to “stay and play” in their back yard and now the radio, television and newspaper ads encouraging residents to “Get Lost in Montana.” These messages remind residents that a vacation in their own state *is* a vacation, that it is a great place to play, and that they, too, are tourists, hence being a tourist is not 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. Now, with the Gulf oil spill creating a tourism nightmare to the Gulf states, the connection between disasters (natural or man-made) is showing how important tourism is to a region. It appears that residents in Montana and probably around the country are becoming more and more aware of the benefits of tourism.
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.
4. Overcrowding is a subjective concept. In the early 1990’s when bed tax dollars were just starting to create enough money to aggressively advertise the state, residents were not as ready to share their backyard. Today, however, nonresident visitation has almost become synonymous with “good” and therefore a few more people around simply means that residents share the wealth or visit the area when there aren’t as many tourists. By

human nature we can easily adjust, and when we live 'right here' it is easier to avoid the busy times. Perhaps the perception of overcrowding, then, is an issue that residents have learned to cope with in their own way.

5. The Montana Tourism Charter is a guide for the tourism industry to “maintain the integrity of place” in Montana. Residents are on board with this idea in terms of what the tourism industry should be doing. This shows the tourism industry and Montana residents share the same values. Residents may come to appreciate tourism even more if the tourism industry is perceived as being a friend of the state’s natural and cultural resources.

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 to make presentations to nonprofits, business leaders, elected officials, and other groups on a regular basis to keep tourism issues in the forefront. The tourism charter should be “touted” as the guide for the industry to these other groups as it shows how tourism businesses and agencies aim to protect (but share) what Montana is all about. Additionally, key individuals in the tourism industry could add their name to the Montana Humanities speaker’s bureau to discuss the relationship between residents and visitors to the state and how it impacts the state.
2. The MT Tourism Charter needs to become ratified by more cities, counties, and organizations around the state. Tourism Advisory Council members could be the catalyst for making this happen. A task force to create a plan of action on how to get organizations to sign on to the charter should be implemented. After the action plan is created, follow-through is necessary.
3. Continue any PSA’s and other advertising of travel in Montana. The “Get Lost in Montana” campaign will keep enlightening residents to the fact that Montana is a tourist state and a nice place to visit for them as well as others.
4. 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 “feeling” 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.

Future Research

For this study we were able to create seven questions related to the MT Tourism Charter and ask residents the priority they think the tourism industry should place on each of those concepts. This is good start to understanding if residents and the tourism industry share the same values. Future research should include asking residents about specific geotourism attributes in the state. It is recommended that residents are surveyed with the same questions from the study “Statewide Vacationers to Montana: Are they Geotravelers? (http://www.itrr.umt.edu/research10/StatewideGeotourismRR2010_2.pdf). This questionnaire asked nonresidents how important various attributes were to them when traveling in Montana. The resident questionnaire could ask how important these attributes are to them as a resident of 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.

Finally, it is recommended that research about resident attitudes continue on a regular basis as this provides the tourism industry with a gauge to whether or not actions need to be taken.

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	2009
Strongly Disagree (-2)	4%	10%	7%	10%	8%	8%	5%	6%	8%	20%	9%	9%	8%	10%	8%	12%	6%	8%
Disagree (-1)	17%	8%	12%	12%	11%	11%	13%	10%	12%	18%	10%	10%	13%	10%	11%	11%	13%	9%
Unsure (0)	6%	7%	6%	9%	8%	6%	10%	11%	10%	10%	6%	6%	3%	6%	4%	6%	6%	7%
Agree (+1)	33%	29%	32%	31%	31%	32%	39%	39%	28%	27%	38%	37%	33%	33%	36%	33%	39%	37%
Strongly Agree (+2)	40%	47%	42%	39%	41%	43%	33%	35%	43%	25%	37%	37%	43%	42%	41%	38%	35%	40%
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	0.95
Sample Size	396	414	405	410	407	403	404	426	410	415	524	405	418	625	572	449	424	306

Table 2: "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	2009
Strongly Disagree (-2)	13%	22%	11%	19%	16%	17%	12%	19%	18%	9%	14%	15%	15%	16%	14%	19%	12%	15%
Disagree (-1)	14%	16%	22%	16%	18%	18%	22%	21%	18%	9%	18%	18%	21%	17%	18%	18%	21%	19%
Unsure (0)	9%	5%	4%	9%	8%	6%	13%	13%	15%	9%	8%	7%	4%	5%	4%	5%	7%	5%
Agree (+1)	31%	25%	37%	31%	32%	33%	37%	29%	28%	51%	25%	22%	32%	36%	40%	35%	39%	40%
Strongly Agree (+2)	32%	31%	27%	26%	26%	25%	17%	18%	22%	22%	34%	38%	27%	26%	24%	23%	21%	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	0.33
Sample Size	396	414	405	410	409	398	404	425	410	415	524	405	418	636	581	455	424	306

Table 3: "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	2009
Strongly Disagree (-2)	25%	34%	28%	21%	27%	22%	18%	21%	33%	37%	42%	38%	39%	38%	36%	35%	27%	33%
Disagree (-1)	34%	23%	27%	24%	24%	33%	32%	31%	32%	27%	28%	34%	27%	33%	35%	32%	41%	35%
Unsure (0)	3%	5%	3%	5%	7%	6%	14%	8%	7%	5%	4%	2%	3%	2%	1%	5%	5%	4%
Agree (+1)	21%	15%	26%	25%	20%	25%	25%	24%	15%	15%	12%	12%	20%	16%	18%	16%	19%	20%
Strongly Agree (+2)	17%	23%	16%	25%	21%	14%	11%	16%	14%	15%	16%	14%	11%	11%	10%	12%	8%	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	0.64
Sample Size	396	414	405	410	409	404	404	426	410	415	524	405	418	641	581	455	424	308