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Montana Poll:

Resident Attitudes Toward Tourism

1992 - 2003

Research Report 2004-4

April 2004

**Montana Poll:
Resident Attitudes Toward Tourism
1992 - 2003**

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Introduction

In each of the past two 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 2003-2007 Strategic Plan for Tourism and Recreation says: "Enhance awareness and support for tourism and recreation among Montana citizens and elected officials, including additional funding sources to support sustainable tourism." Monitoring attitudes towards tourism is one component of this goal. 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.

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 is interpreted as disagreement, and a score of +1 is interpreted as agreement. The following section outlines the average responses of participants from 1992 to 2003. 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 document 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 12 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 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 9/11 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 interesting results over the 12 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 continues to experience 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.

Figure 1: Benefits of Tourism Outweigh Negatives

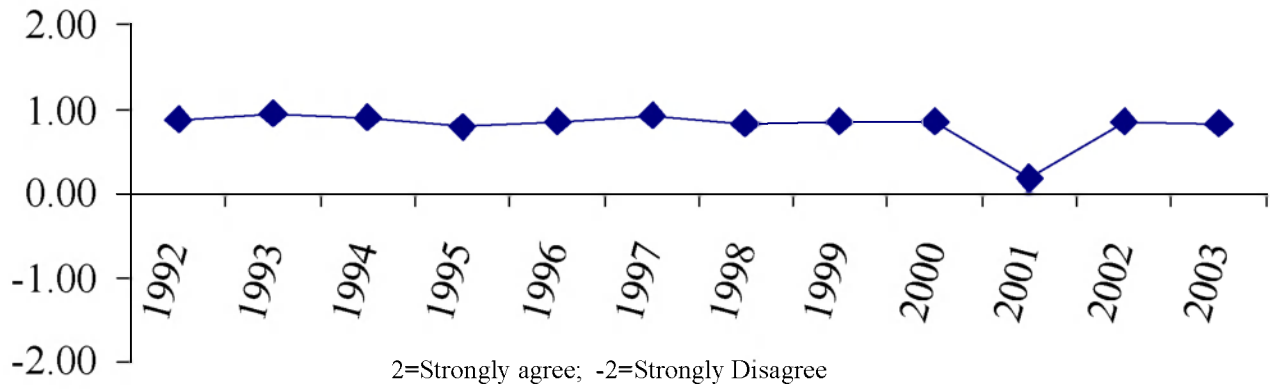


Figure 2: Increases in Tourism will Improve Quality of Life

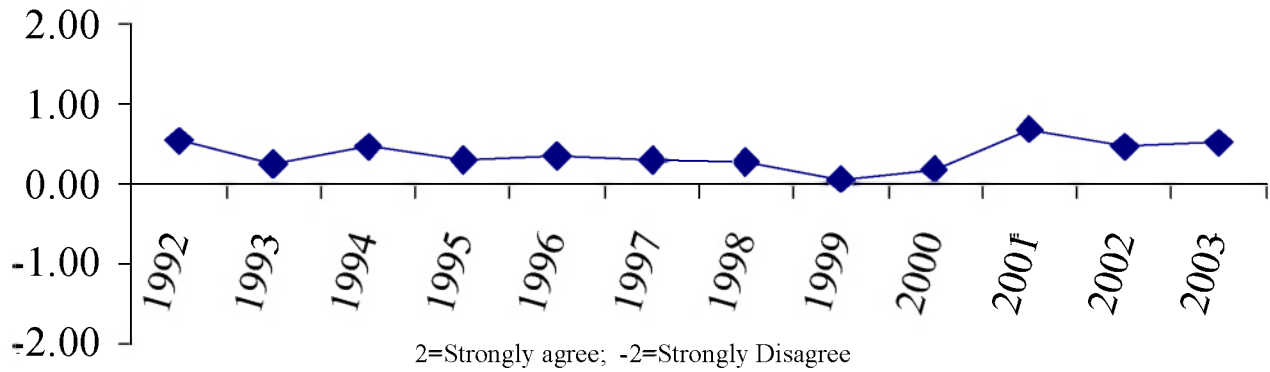
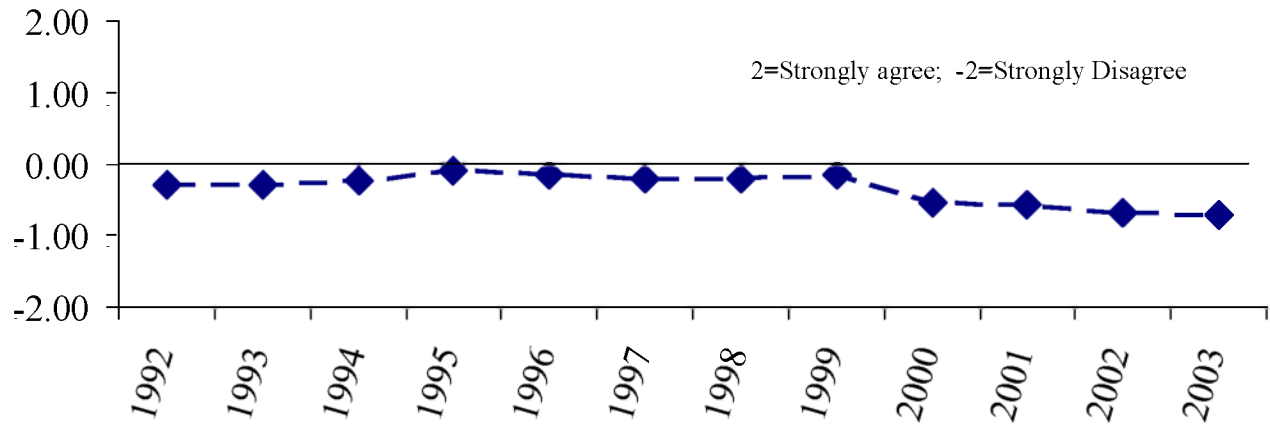


Figure 3: Montana is Becoming Overcrowded Due to Tourism



Summary, Implications, and Recommendations

As of December 2003, 74 percent of Montana residents agree that the overall benefits of tourism outweigh the negative impacts, 60 percent agree that if tourism increases so does the overall quality of life for Montana residents, and 72 percent do not think that the state is becoming overcrowded due to tourists. An overwhelming majority of Montana residents, therefore, have a positive attitude toward tourism as based on these three questions.

The terrorists attacks in 2001 are likely to be the cause of a temporary change in attitudes. In regards to benefits of tourism outweighing the positives, respondents in 2001 were less likely to agree. In other words, perhaps because airplanes were used as the weapon, the benefits of air travel and hence tourism could be argued. However, by 2002, residents were right back in line with previous attitudes about the benefits of tourism. In addition, there was a slight increase in the number of people who believe that increases in tourism will benefit the quality of life for Montana residents after 9/11. Finally, attitudes toward overcrowding began to change in 2000 to be less of a problem.

As seen by these data, attitudes are changing and are changing in a positive direction for the travel industry. There are a number of plausible explanations for this change.

1. First, as mentioned, 9/11 had a dramatic effect on the population and sentiments of the American people. While overall visitation to Montana has continued to steadily increase, the immediate impact of the terrorist attacks were certainly felt at Montana's airports and resort areas. People and businesses were personally affected. This could be one of the main reasons an increase in positive attitudes toward tourism was experienced.
2. The industry, through the Montana Inn Keepers and through promotions conducted in the state by Travel Montana, have presented tourism as a positive and beneficial economic driver for the state of Montana. 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. In fact, some of these promotions occurred after the 1999 Montana Poll where resident's attitude about quality of life and tourism seemed to be on a downward trend. It is very possible that the industry response of "educating residents" worked well. Also, after 9/11, Travel Montana has been visible in the state through their advertisements on the television suggesting to residents to "stay and play" in their back yard. Perhaps recommending that residents should vacation in their own state suggests to the resident that they, too, are tourists at some time and hence tourists are really not all that bad.
3. Natural disasters such as wildfires that plagued western Montana in 2000 and 2003 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.
4. The population of Montana is 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.

While all of these ideas on why the attitudes are changing are speculation, these are all very likely contributors to the slight changes in resident attitudes toward tourism. It is recommended that public awareness campaigns geared toward educating residents about the industry continue on a regular basis. It is important for policy makers and other decision makers to have information about the industry in the forefront at all times. Finally it is recommended that in-depth interviews of residents who are negative about tourism be conducted to further understand their views.

Table 1: Extent of agreement or disagreement that "The overall benefits of tourism outweigh the negative impacts" among Montana adults by monitoring period, in percent "

	Dec-92	Dec-93	Dec-94	Dec-95	Dec-96	Dec-97	Dec-98	Dec-99	Dec-00	Dec-01	Dec-02	Dec-03
Strongly Disagree (-2)	4%	10%	7%	10%	8%	8%	5%	6%	8%	20%	9%	9%
Disagree (-1)	17%	8%	12%	12%	11%	11%	13%	10%	12%	18%	10%	10%
Don't Know (0)	6%	7%	6%	9%	8%	6%	10%	11%	10%	10%	6%	6%
Agree (+1)	33%	29%	32%	31%	31%	32%	39%	39%	28%	27%	38%	37%
Strongly Agree (+2)	40%	47%	42%	39%	41%	43%	33%	35%	43%	25%	37%	37%
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
Sample Size	396	414	405	410	407	403	404	426	410	415	524	405
Combined Agreement and Disagreement Statements												
	Dec-92	Dec-93	Dec-94	Dec-95	Dec-96	Dec-97	Dec-98	Dec-99	Dec-00	Dec-01	Dec-02	Dec-03
Disagree (-2 & -1)	21%	18%	19%	22%	19%	19%	18%	16%	20%	38%	19%	19%
Agree (+1 & +2)	73%	76%	74%	70%	72%	75%	72%	74%	71%	52%	75%	74%

Table 2: Extent of agreement or disagreement that "If tourism increases in Montana, the overall quality of life for Montana residents will improve" among Montana adults by monitoring period, in percent.

	Dec-92	Dec-93	Dec-94	Dec-95	Dec-96	Dec-97	Dec-98	Dec-99	Dec-00	Dec-01	Dec-02	Dec-03
Strongly Disagree (-2)	13%	22%	11%	19%	16%	17%	12%	19%	18%	9%	14%	15%
Disagree (-1)	14%	16%	22%	16%	18%	18%	22%	21%	18%	9%	18%	18%
Don't Know (0)	9%	5%	4%	9%	8%	6%	13%	13%	15%	9%	8%	7%
Agree (+1)	31%	25%	37%	31%	32%	33%	37%	29%	28%	51%	25%	22%
Strongly Agree (+2)	32%	31%	27%	26%	26%	25%	17%	18%	22%	22%	34%	38%
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
Sample Size	396	414	405	410	409	398	404	425	410	415	524	405
Combined Agreement and Disagreement Statements												
	Dec-92	Dec-93	Dec-94	Dec-95	Dec-96	Dec-97	Dec-98	Dec-99	Dec-00	Dec-01	Dec-02	Dec-03
Disagree (-2 & -1)	27%	38%	33%	35%	34%	35%	34%	40%	36%	18%	32%	33%
Agree (+1 & +2)	63%	56%	64%	57%	58%	58%	54%	47%	50%	73%	59%	60%

Table 3: Extent of agreement or disagreement that "in recent years, the state is becoming overcrowded because of more tourists" among Montana adults by monitoring period, in percent

	Dec-92	Dec-93	Dec-94	Dec-95	Dec-96	Dec-97	Dec-98	Dec-99	Dec-00	Dec-01	Dec-02	Dec-03
Strongly Disagree (-2)	25%	34%	28%	21%	27%	22%	18%	21%	33%	37%	42%	38%
Disagree (-1)	34%	23%	27%	24%	24%	33%	32%	31%	32%	27%	28%	34%
Don't Know (0)	3%	5%	3%	5%	7%	6%	14%	8%	7%	5%	4%	2%
Agree (+1)	21%	15%	26%	25%	20%	25%	25%	24%	15%	15%	12%	12%
Strongly Agree (+2)	17%	23%	16%	25%	21%	14%	11%	16%	14%	15%	16%	14%
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
Sample Size	396	414	405	410	409	404	404	426	410	415	524	405
Combined Agreement and Disagreement Statements												
	Dec-92	Dec-93	Dec-94	Dec-95	Dec-96	Dec-97	Dec-98	Dec-99	Dec-00	Dec-01	Dec-02	Dec-03
Disagree (-2 & -1)	59%	57%	55%	45%	51%	55%	50%	52%	65%	64%	70%	72%
Agree (+1 & +2)	38%	38%	42%	50%	41%	39%	36%	40%	29%	30%	28%	26%