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# The Montana Expression 2020: Residents' Attitudes Towards Tourism

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MT Expression Research Report 2020-12

Carter Bermingham, Kara Grau, Norma P. Nickerson, Ph.D., & Megan Schultz

10/15/2020



Photo Courtesy of Jacob W. Frank – Yellowstone National Park

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# The Montana Expression 2020: Residents' Attitudes Towards Tourism

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## Introduction

This report is a summary of Montana residents' attitudes toward tourism during the summer of the 2020 pandemic. Data were collected during 3<sup>rd</sup> quarter (July through September) 2020. Usually, ITRR conducts this survey during the 4<sup>th</sup> quarter of each year, but the unfolding travel and recreation challenges brought on by the global COVID-19 pandemic created a need to assess resident attitudes earlier. Similar Montana resident attitude data reach back to 1992 and can be accessed on [ITRR's Interactive Data Website](#) (Residents Attitudes Towards Tourism).

The pandemic has dramatically changed travel and tourism patterns in an unprecedented fashion. Anecdotal evidence suggested that visitors to the state were different this year, and residents appeared fairly unhappy about them being in Montana. This study was conducted to determine if residents' attitudes toward visitors and the travel industry have indeed changed.

## Purpose

The main purpose of this study was to assess Montanans' attitudes towards tourism in the state. As a state that is economically dependent upon tourism, there was also a desire to understand these attitudes in the midst of the COVID-19 pandemic. More specifically, these questions were posed to better understand how Montanans perceive their quality of life in relation to tourism, how they perceive crowding in the state and their community, and the degree to which they feel tourism in their community benefits them economically. One purpose is to compare this data to previous years' data to further our understanding of differences over the past 10 years.

Additionally, residents' attitudes about visitors in Montana during a pandemic were assessed by asking questions specifically related to COVID-19.

## Methods

Data were collected by trained surveyors who ask questions to Montanans as they filled up their vehicle with fuel at gas stations or when they stopped at rest areas around the state. ITRR has permission from over 100 gas stations across the state to talk to residents during the time it takes them to fill their tank. From July 1st to September 30<sup>th</sup>, 2020, any Montanan who stopped at gas stations or rest areas had an opportunity to be surveyed about their attitudes toward tourism in Montana. The respondent data were weighted by the county of residence and gender from the census, thus providing a representative sample reflecting the geographic population and gender of the state.

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## Survey design

The survey was designed by ITRR personnel and loaded on iPads for eight surveyors located around the state. The survey was short by design (due to the amount of time available) with only 11 questions. In addition to four main attitude questions asked every year, this survey included a few questions specifically related to COVID-19. See appendix A for survey questions.

## Limitations

This study was limited to Montana residents 18 and older who either drove or were a passenger in a vehicle. During this COVID-19 data collection time period, the study was limited to surveyors who were willing and comfortable approaching individuals while wearing a mask and staying 6 feet away from the respondent. In some locations, especially the Billings area, there was some difficulty related to keeping surveyors, thus the responses from residents from Yellowstone County had to be weighted higher to represent the population.

## Response rate

The response rate was 90%, with 4,095 Montana residents responding to the survey during the 3<sup>rd</sup> quarter of 2020, and 452 refusing to participate.

## Results

Respondent ages ranged from 18-95 with an average age of 48.23 years. For this study, the gender breakdown was roughly 50% male and 50% female. The number of respondents by age category is shown in Table 1 and the gender breakdown is shown in Table 2.

**Table 1: Percent of Respondents by Age**

2020		N	%
Average age of respondent = 48.23 years old	18-24	364	9%
	25-34	622	16%
	35-44	701	18%
	45-54	674	17%
	55-64	865	22%
	65-74	642	16%
	75+	126	3%
	Total	3994	100%

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**Table 2: Percent of Respondents by Gender**

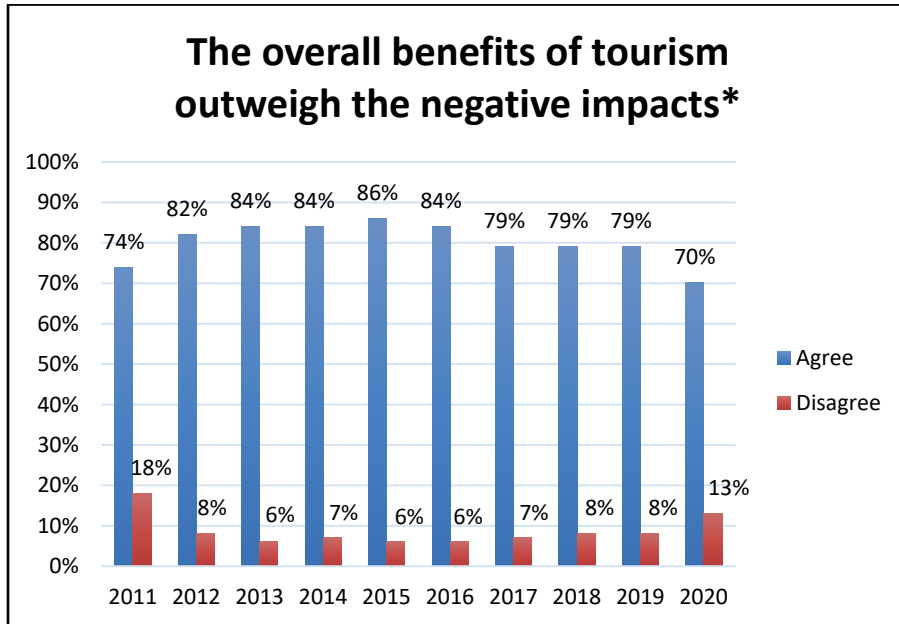
2020		N	%
Gender	Male	2018	50%
	Female	1993	50%
	Total	4011	100%

Residents were asked if they felt that the overall benefits of tourism outweighed the negative impacts on a scale from strongly disagree to strongly agree. The majority of respondents (70%) agreed or strongly agreed that the overall benefits of tourism outweigh the negative impacts in Montana. Displayed below in Table 3 is a breakdown of responses. In Figure 1 we can see that while agreement with the statement is high, it is currently at the lowest level of the past 10 years.

**Table 3: Overall Benefits of Tourism Outweigh Negative Impacts**

2020		N	%
The overall benefits of tourism outweigh the negative impacts.	Strongly Disagree	99	2%
	Disagree	426	11%
	Unsure	669	17%
	Agree	2107	52%
	Strongly Agree	718	18%
	Total	4019	100%

Figure 1: Overall Benefits of Tourism Outweigh Negative Impacts - Annual Comparison



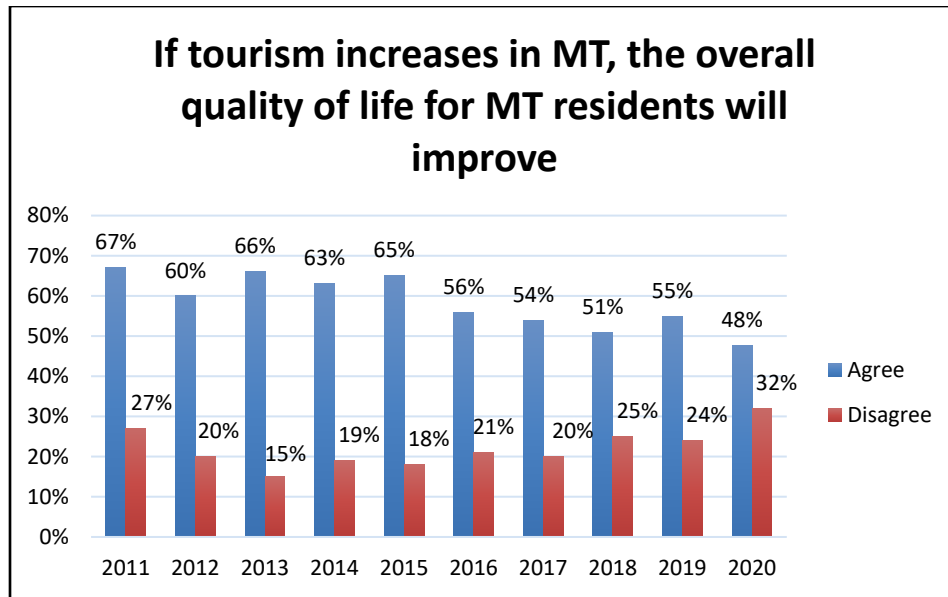
\*Agree and disagree bars do not add to 100% because of respondents who said 'unsure'

Residents were then asked if they felt that their quality of life and the quality of life for other Montana residents would improve if tourism increases. Table 4 displays Montana residents' responses. Forty-seven percent of residents responded that they agree or strongly agree that the quality of life for residents of Montana would improve if tourism increases. However, the next highest response was with those who disagreed, with 32% of respondents selecting that option, followed by 20% who were unsure. When making annual comparisons, 2020 presents the first year in the last decade in which less than 50% of respondents agreed with the statement. (Figure 2)

Table 4: Quality of Life Improvement with Increase in Tourism

2020		N	%
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	Strongly Disagree	200	5%
	Disagree	1091	27%
	Unsure	818	20%
	Agree	1653	41%
	Strongly Agree	261	7%
	Total	4023	100%

Figure 2: Quality of Life Improvement with Increase in Tourism - Annual Comparison



\*Agree and disagree bars do not add to 100% because of respondents who said 'unsure'

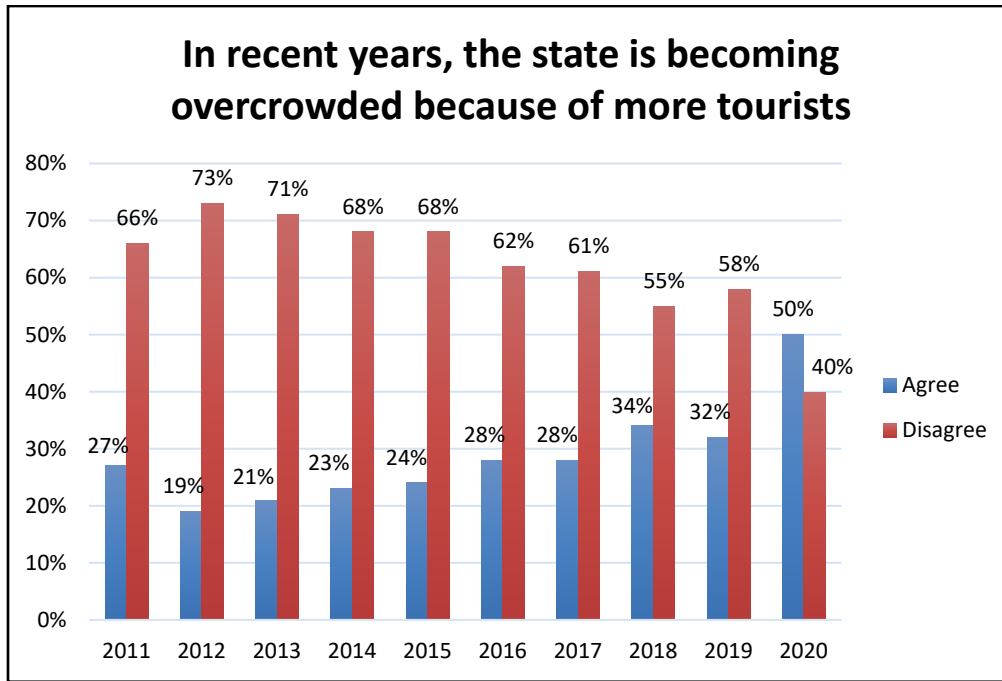
Residents were then questioned about their opinions on crowding related to tourism. They were first asked if they felt that the state was becoming overcrowded because of more tourists in recent years. The next question asked if they felt their community was becoming overcrowded with tourists, specifically in the summer tourist season. Results regarding respondents' assessments at a state level are listed in Table 5 and Figure 3, while results regarding perceptions at the community level are listed in Table 6. Residents expressed a wide range of opinions with respect to these questions. Fifty percent of residents stated that they agreed or strongly agreed that the **state** was becoming overcrowded with tourists which is an 18% increase over 2019 attitudes. Additionally, 44% of residents believe their **community** was becoming overcrowded because of tourists.

Table 5: State Becoming Overcrowded Due to Tourists

2020		N	%
In recent years, the state is becoming overcrowded because of more tourists.	Strongly Disagree	97	2%
	Disagree	1502	37%
	Unsure	430	11%
	Agree	1593	40%
	Strongly Agree	389	10%
	Total	4011	100%



Figure 3: State Becoming Overcrowded Due to Tourists - Annual Comparison



\*Agree and disagree bars do not add to 100% because of respondents who said 'unsure'

Table 6: Community Becoming Overcrowding in Summer Months Due to Tourists

2020		N	%
In recent years, my community is becoming overcrowded because of more visitors during the summer tourist season.	Strongly Disagree	159	4%
	Disagree	1798	45%
	Unsure	308	8%
	Agree	1209	30%
	Strongly Agree	543	14%
	<b>Total</b>	<b>4017</b>	<b>100%</b>

The next question asked residents whether they felt tourism promotion by the state of Montana benefits their community economically. Table 7 displays residents' responses to this question. The majority of residents (62%) agreed that tourism promotion by the state of Montana benefits their community economically. In addition, 22% of respondents said that they strongly agreed with the statement.

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**Table 7: Tourism Promotion by the State Benefits My Community Economically**

2020		N	%
Tourism promotion by the state of Montana benefits my community economically.	Strongly Disagree	20	0.5%
	Disagree	318	8%
	Unsure	270	7%
	Agree	2507	62%
	Strongly Agree	900	22%
	Total	4015	100%

Residents were asked how long they have lived in their current community, as well as the size of the community in which they currently live. The largest portion of respondents (43%) indicated they have lived in their current community for over 20 years. In addition, the largest percentage of respondents (40%) stated that they lived in a community with a population of over 20,000.

**Table 8: How Long Resident Has Lived in Their Current Community**

2020		N	%
How long have you lived in your current community?	Less than 1 year	274	7%
	1 to 5 years	765	19%
	6-10 years	557	14%
	11-20 years	691	17%
	More than 20 years	1737	43%
	Total	4024	100%

**Table 9: Size of Community**

2020		N	%
Which of the following best describes the place where you live?	Rural area outside of any community borders	794	20%
	Community less than 5,000 population	1075	27%
	Community of 5,001 to 10,000 people	359	9%
	Community of 10,001-20,000 people	173	4%
	Community of more than 20,000	1584	40%
	Total	3985	100%

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Lastly, residents were asked questions specifically related to their own concerns and travel patterns as a result of the COVID-19 pandemic. First, residents were asked if they were more concerned about visitors in their community due to the presence of COVID-19. Overall, 68% of respondents agreed with that statement (38% agree, 30% strongly agree). When asked if they were more likely to travel within Montana than leaving the state, residents overwhelmingly agreed (43%) or strongly agreed (28%) with the statement (Table 9 and Table 10).

**Table 10: Concern About Visitors in My Community Due to COVID-19**

2020		N	%
Because of COVID-19, I am more concerned about visitors in my community.	Strongly Disagree	171	4%
	Disagree	849	21%
	Unsure	247	6%
	Agree	1528	38%
	Strongly Agree	1209	30%
	Total	4004	100%

**Table 11: Likelihood of Traveling Within Montana Rather Than Out-of-State**

2020		N	%
Because of COVID-19, I am more likely to travel within Montana than out-of-state.	Strongly Disagree	115	3%
	Disagree	712	18%
	Unsure	188	5%
	Agree	1732	43%
	Strongly Agree	1109	28%
	Total	3856	96%

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## Summary and Discussion

Overall, this study displays a general positive attitude that Montanans have towards tourism in the state even in the midst of a global pandemic. However, there appears to be a downward trend to that positive attitude when compared to three of the same questions asked in previous years.

A majority of Montana residents (70%) felt that the overall benefits of tourism outweigh the negative impacts, but this represents a 9% drop in agreement from 2019 and the lowest agreement level in 10 years. Forty-seven percent of residents agreed or strongly agreed that the quality of life for Montana residents would improve with increased tourism. This is also the lowest agreement level in a decade.

Finally, the most significant change in attitude was seen in the responses to the statement, "In recent years, the state is becoming overcrowded because of more tourists." For the first time in 10 years, more people agreed than disagreed with that statement representing an increase of 18% over 2019 responses.

The three questions above and the change in the negative direction about tourism could be a red flag for Montana's travel industry. In the past, visitors have overwhelmingly said that the people in Montana are so friendly. If that changes and residents are less likely to be friendly to visitors, how will that impact tourism in Montana? Will overall support for tourism policies dwindle?

Other questions that don't have trend data available were also asked. In terms of residents' perception of their community becoming overcrowded due to tourism, it was almost split (44% agreed while 49% disagreed). Montanans felt strongly that tourism promotion by the state benefits their community economically (84% agreed).

However, a majority (68%) also agreed or strongly agreed that, because of COVID-19, they were more concerned about visitors in their community than in years past. Additionally, 71% of respondents indicated they were more likely to travel within Montana than elsewhere as a result of COVID-19.

Keep in mind when looking at these data, that in all the other years data were collected in the months of October through December. The 2020 data reflected here represent data collected from July 1st through September 30th, 2020. The difference in timing of data collection could explain some of the change in attitudes, especially since these new data were collected during the peak travel season of an ongoing global pandemic. In addition, COVID-19 itself could be responsible for the change in attitudes and thoughts of residents when compared to previous years of data collection. The study will be repeated in the 4th quarter of 2020 to assess any differences between peak season and off-season attitudes, as well as continuing trend differences from year to year.

## Appendix A: Survey Questions

Questions asked Q3 2020

1. What Montana county do you live in?

On a scale of strongly disagree, disagree, unsure, agree, and strongly agree do you think.....

2. The overall benefits of tourism outweigh the negative impacts
3. If tourism increases in Montana, the overall quality of life for Montana residents will improve
4. In recent years, the state is becoming overcrowded because of more tourists
5. In recent years, my community is becoming overcrowded because of more visitors during the summer tourist season
6. Tourism promotion by the state of Montana benefits my community economically
7. Because of COVID-19, I am more concerned about visitors in my community
8. Because of COVID-19, I am more likely to travel within Montana than out-of-state.
9. Which of the following best describes the place where you live?
  - a. Rural
  - b. Less than 5,000
  - c. 5,000-10,000
  - d. 10,001-20,000
  - e. More than 20,000
10. How long have you lived in your current community?
  - a. Less than 1 year
  - b. 1-5 years
  - c. 6-10 years
  - d. 11-20 years
  - e. More than 20 years
11. May I please ask your age?