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Montana Residents: Attitudes Towards Tourism 2021

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MONTANA RESIDENTS:

ATTITUDES TOWARDS TOURISM 2021

CARTER BERMINGHAM, MEGAN SCHULTZ &
MATTHEW PETTIGREW

Quarterly Montana Resident Report / 4th Quarter: November - December 2021

ABOUT OUR WORK

Quarterly Montana Resident Study

This report is a summary of Montana residents' attitudes towards tourism within the state. Since 1992, ITRR has asked residents questions specific to their attitudes towards tourism during the 4th quarter of each year (October, November, December) as a way of tracking the current trends in perception towards the industry. Originally, the survey asked residents to agree or disagree with the following statements: 1) The overall benefits of tourism outweigh the negative impacts; 2) If tourism increases, the quality of life for MT residents will improve; and 3) In recent years, the state is becoming overcrowded because of more tourists.

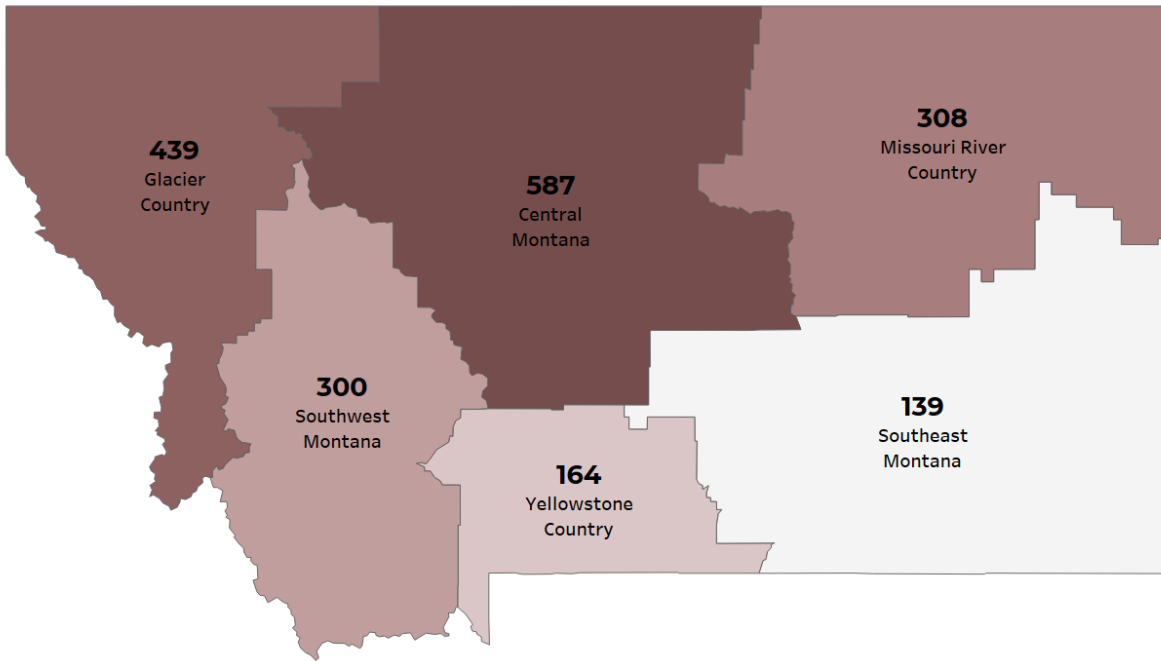
This study was conducted to continue tracking the perception of the tourism industry in Montana, as well as expanding the original survey to include topics such as the perceived economic benefit tourism provides to local communities, crowding at the local community level, and the impact COVID-19 has had on residents comfort level in welcoming visitors to their community in addition to their own willingness to travel outside the state. The report also includes demographic information as well as analysis conducted on the six different travel regions within the state (Glacier, Southwest, Central, Yellowstone, Southeast, and Missouri River).

FOR ACCESS TO THE COMPLETE REPORT, VISIT OUR INTERACTIVE DASHBOARD AT:
<https://itrr.umt.edu/interactive-data/resident-q4p2-2021.php>

METHODS

Data were collected by trained surveyors who asked 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 November 16th to December 31st, 2021, any Montanan 18 years of age or older at these locations had an opportunity to be surveyed about their attitudes towards tourism within the state. Topics include perceived crowding at the state and community levels, tourism and quality of life, and the benefits tourism provides, among other topics. The respondent data were weighted by the county of residence and gender from the US Census, thus providing a representative sample reflecting the geographic population and gender of the state.

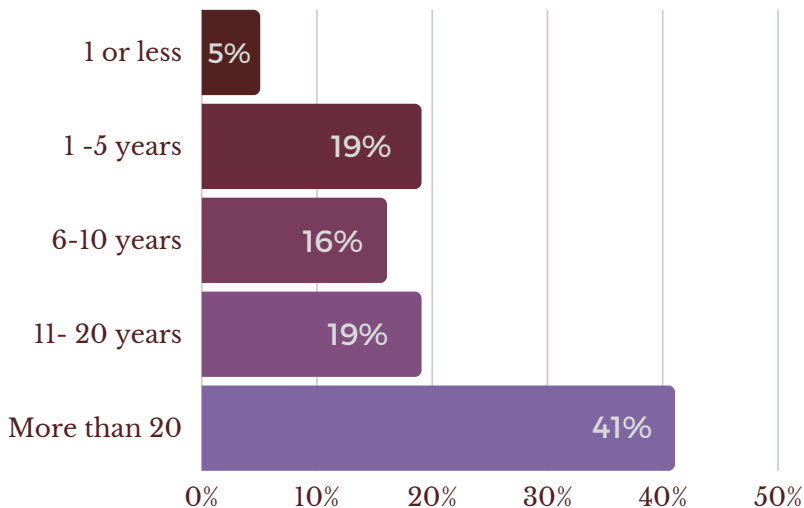
DEMOGRAPHICS



MONTANA TRAVEL REGIONS

A total of 1,941 Montana residents were surveyed from November 16th - December 31st, 2021 regarding their general attitudes towards tourism across the state. Respondents from 52 different Montana counties participated in the survey. Missoula County and the Central Montana travel region represented the highest proportion of residents surveyed during the second half of Q4. A map of the travel regions is presented above with the number of respondents from each region.

Residents living in communities of more than 20,000 people represented 43% of total respondents, followed by 24% who live outside of any community borders, and 17% who live in a community of less than 5,000 people. Twelve percent of respondents stated they lived in a community of 5,001 to 10,000 people while just 4% of respondents reside in a community of 10,001 to 20,000 people.



HOW LONG HAVE YOU LIVED IN MONTANA?

49 YEARS

AVERAGE RESPONDENT AGE

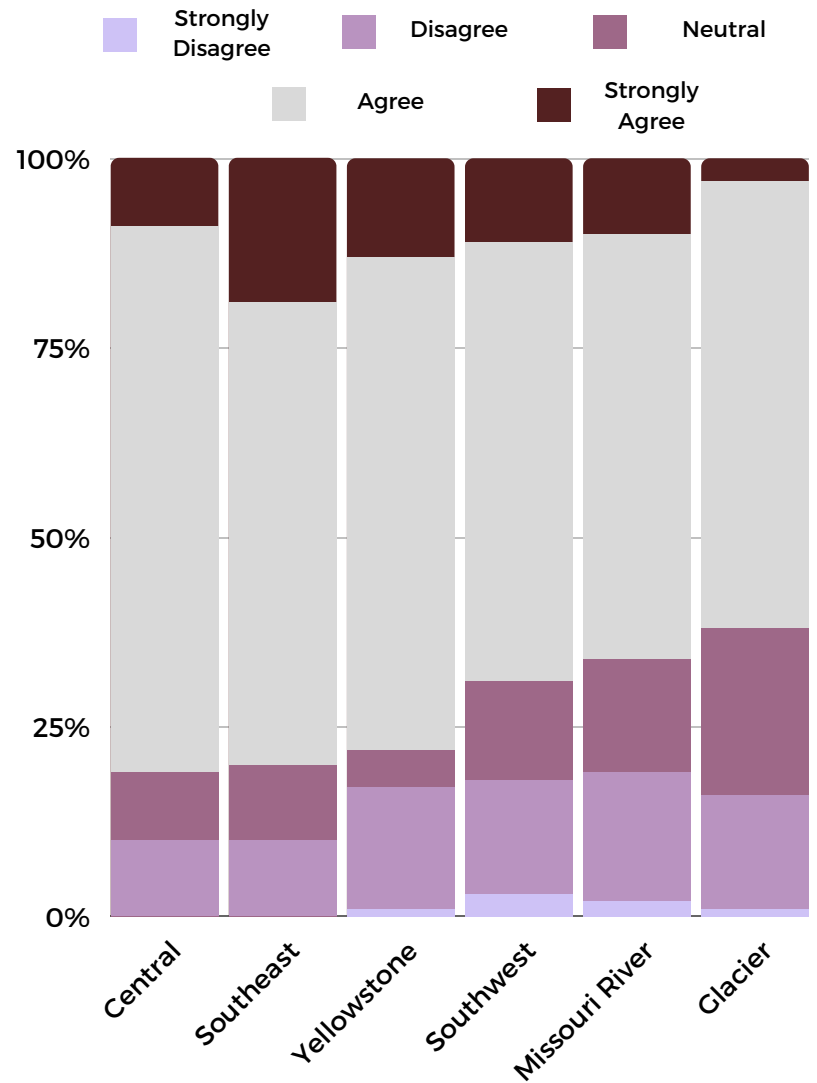
The largest age cohort represented in the survey were respondents between the ages of 55 - 64 years old, accounting for 21% of all respondents. Those between 35 - 44 years old made up 19% of all respondents, followed by those 45 - 54 years old (18%). In addition, the gender split was nearly even after applying census weighting with women representing 49% of respondents while men made up the other 51%.

TOURISM'S BENEFITS AND IMPACTS

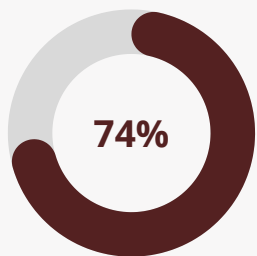
Concerning how the overall benefits of tourism stack up against the negative impacts, residents were in agreement that the benefits outweighed the negative impacts, with 71% of respondents agreeing or strongly agreeing with that statement. When analyzed by travel region, Central Montana (81%) and Southeast Montana (80%) were in the strongest agreement, followed by Yellowstone Country (78%), Southwest Montana (69%), Missouri River Country (66%), and Glacier Country (62%).

Although attitudes towards this question were still overwhelmingly positive with nearly three quarters of respondents either agreeing or strongly agreeing with the statement, the overall agreement level of 71% represents a 5% decrease from 2020 and the lowest agreement level recorded since 2007 (71%).

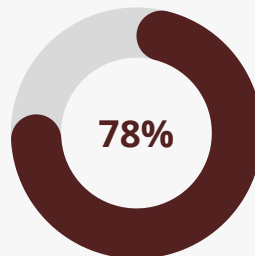
THE OVERALL BENEFITS OF TOURISM OUTWEIGH THE NEGATIVE IMPACTS



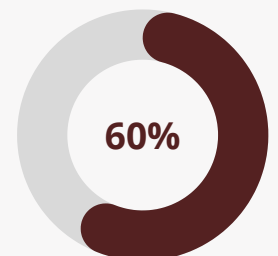
MONTANA TRAVEL REGIONS



Men were slightly more likely than women (70%) to say that the benefits of tourism outweigh the negative impacts



Those who lived in a community of 5,001 to 10,000 people were the most likely to say the benefits outweigh the impacts



Respondents who moved to Montana within the last year were the least likely to say that the overall benefits outweigh the negative impacts

83%

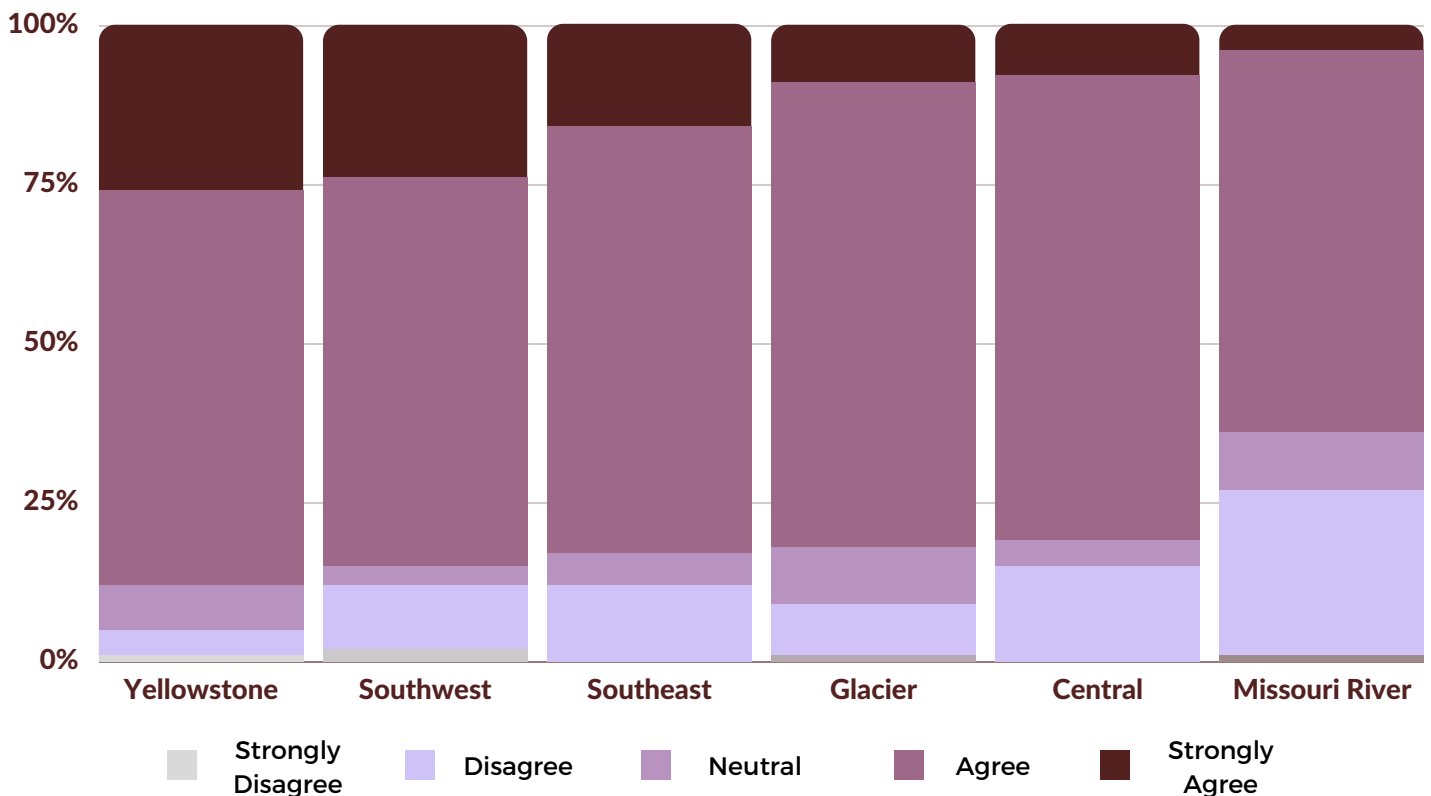
AGREE OR STRONGLY AGREE

Respondents were in strong agreement regarding the economic benefits provided to their community as a result of the state's promotion of the tourism industry. Sixty-eight percent of respondents agreed with the statement, while another 15% of respondents strongly agreed. Comparatively, 10% of respondents disagreed with the statement, while just 1% strongly disagreed.

TOURISM PROMOTION

When analyzing results by travel regions within the state, Yellowstone Country reported the highest agreement level with 88% of respondents either agreeing or strongly agreeing with the statement. Southwest Montana and Southeast Montana also reported high levels of agreement with 85% and 83%, respectively.

Over 60% of respondents within each travel region were in agreement regarding the benefits tourism provides to the state. Missouri River Country was the travel region with the lowest agreement level, with 64% of respondents either agreeing or strongly agreeing with the statement.



COMMUNITY AND STATE CROWDING

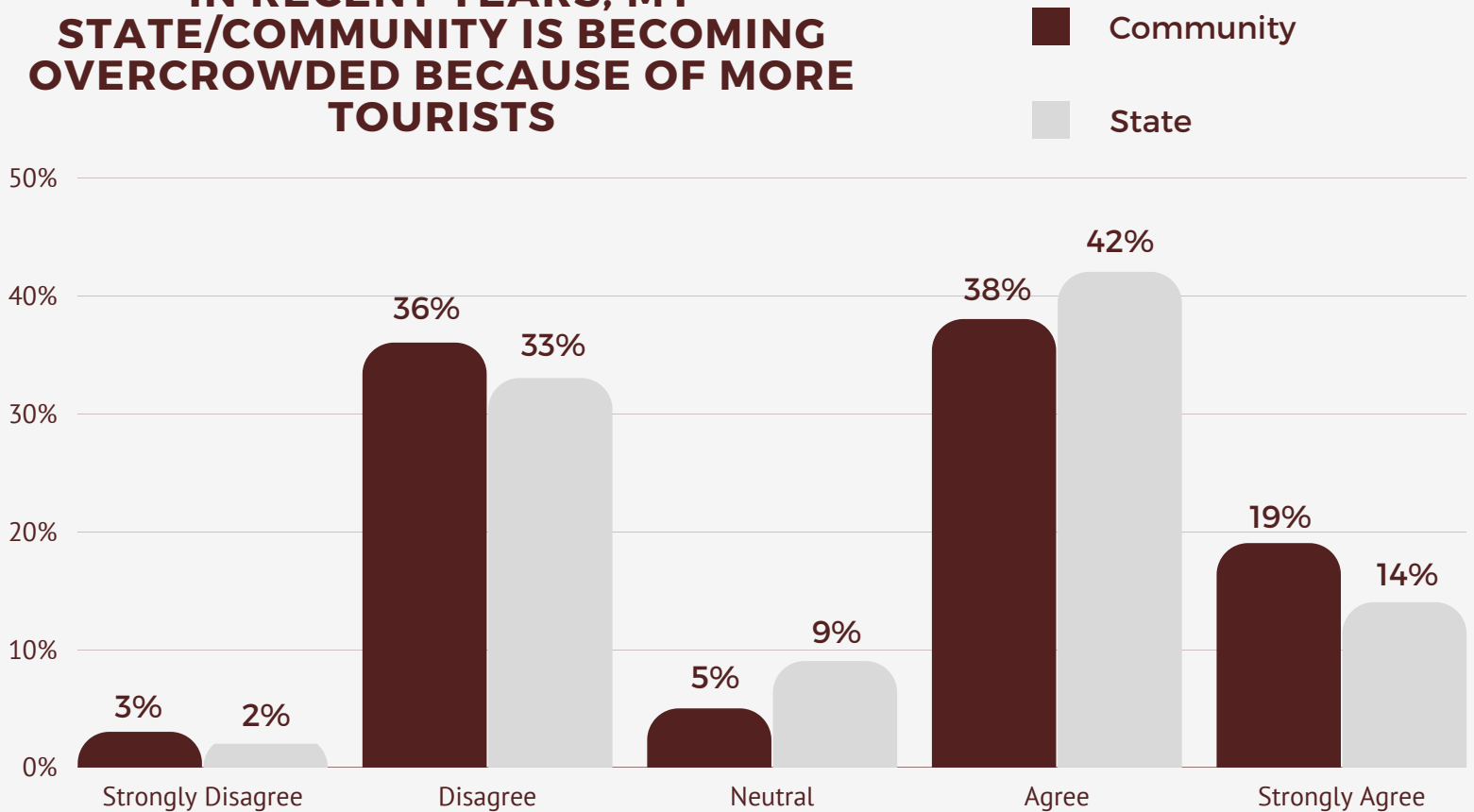
For the first time since ITRR has been asking the question (1992), a majority of respondents (56%) agreed that the state is becoming overcrowded because of more tourists. In addition, respondents were also in agreement over the crowding level in their own communities, with 57% of respondents either agreeing or strongly agreeing with the statement. Furthermore, the 39% disagreement level was the lowest ITRR has recorded, representing a 7% decrease from 2020 and a 33% decrease from 2019.

56%

This level of agreement is the highest ITRR has ever recorded. The 56% agreement level represents a 33% increase from 2020, and a 75% increase from 2019.

Nearly 85% of respondents from Yellowstone Country agreed or strongly agreed that their community was becoming overcrowded because of more tourists. Additionally, 70% of respondents from Glacier Country felt the same. Many residents also expressed that the level of crowding they currently perceive is the result of people moving to the state in addition to the number of people who simply visit each year. For more details, see the comment section on page 8.

IN RECENT YEARS, MY STATE/COMMUNITY IS BECOMING OVERCROWDED BECAUSE OF MORE TOURISTS

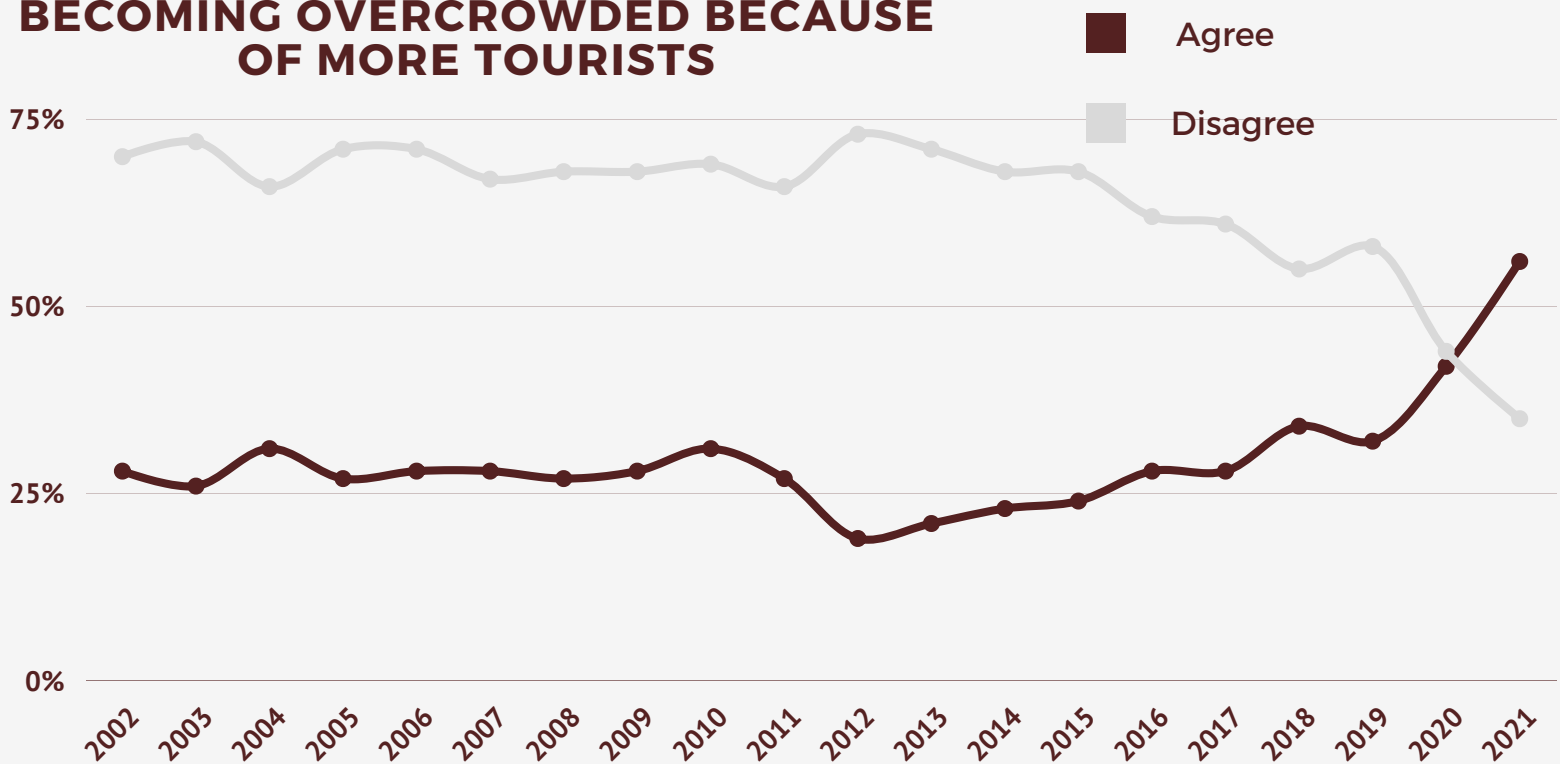


TREND DATA: ANNUAL CROWDING COMPARISONS

As mentioned on the previous page, Q4 of 2021 was the first time ITRR recorded over 50% of respondents (56%) in agreement that the state is becoming overcrowded because of more tourists. One of the features of ITRR's interactive webpage includes resident attitude data and the long term trends that are associated with it. Listed in the figure below are data related to the past 20 years of residents' attitudes towards crowding in the state.

Beginning in 2002, 28% of respondents were in agreement that the state was becoming overcrowded because of more tourists while 70% were in disagreement. Fast forward ten years to 2012, and those figures had shifted to 19% and 73%, respectively. By 2022, agreement levels rose a full 100% from 2002, while disagreement experienced a 50% decrease over that same period. When analyzing long term trend data, it appears that the attitude of many Montana residents was already shifting before the start of the pandemic. However, results indicate that the pandemic has only added fuel to the fire, exacerbating the negative trend regarding residents and their perception of crowding in the state.

IN RECENT YEARS, THE STATE IS BECOMING OVERCROWDED BECAUSE OF MORE TOURISTS

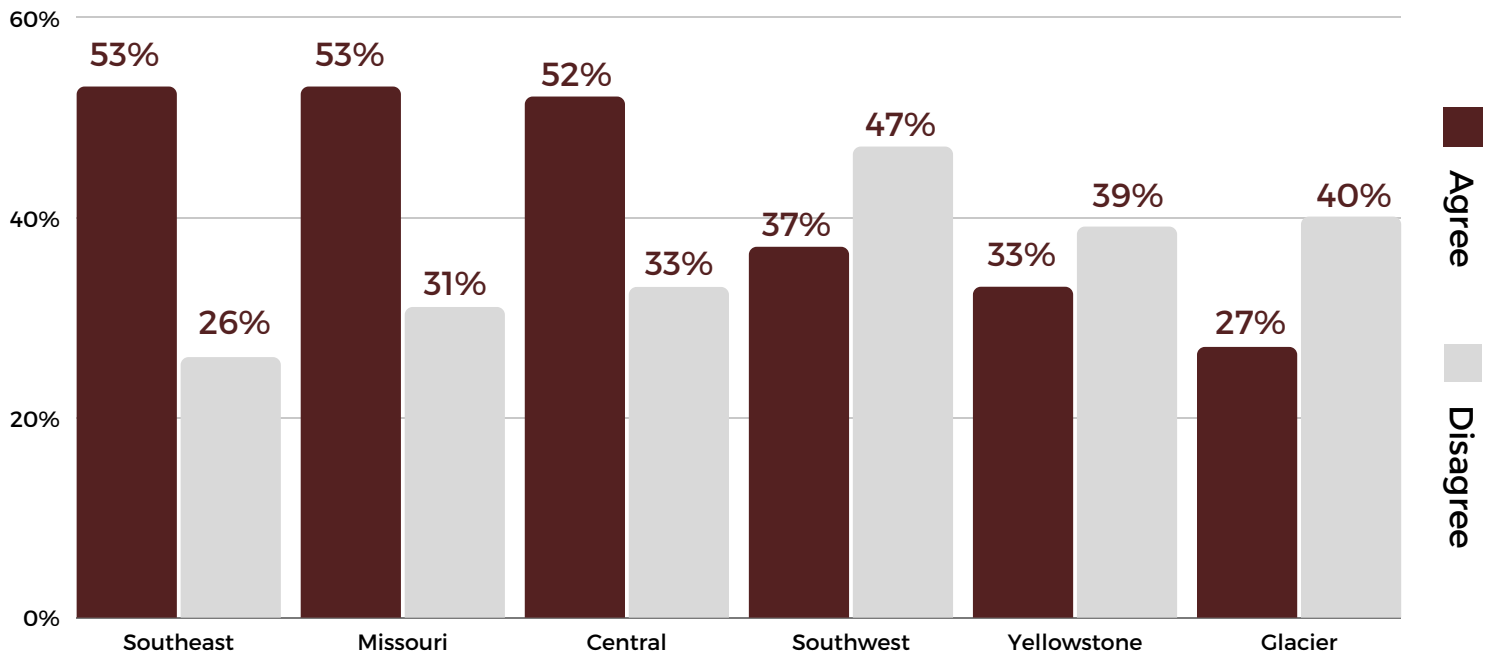


TOURISM AND QUALITY OF LIFE

Residents were asked if they felt that the quality of life for Montana residents would improve if tourism were to increase in the state. Under 40% of respondents (38%) were in agreement with this statement, the lowest agreement level ITRR has recorded since trend data began in 1992. Conversely, 37% of respondents disagreed with the statement, while 25% of respondents were neutral in their response.

22%
Decrease in agreement since 2020

32%
Increase in disagreement since 2020



IF TOURISM INCREASES IN MONTANA, THE OVERALL QUALITY OF LIFE FOR MONTANA RESIDENTS WILL IMPROVE

When analyzing results by travel region, a majority of respondents from Southeast Montana (53%), Missouri River Country (53%), and Central Montana (52%) were in agreement concerning the possible improvement in quality of life if tourism were to increase. In comparison, roughly a third or less of respondents from each region disagreed with the statement.

However, travel regions such as Southwest Montana (37%), Yellowstone Country (33%), and Glacier Country (27%) were in much less agreement regarding a possible increase in quality of life as a result of more tourism. It is worth mentioning that these three travel regions encompass the majority of tourism to the state.

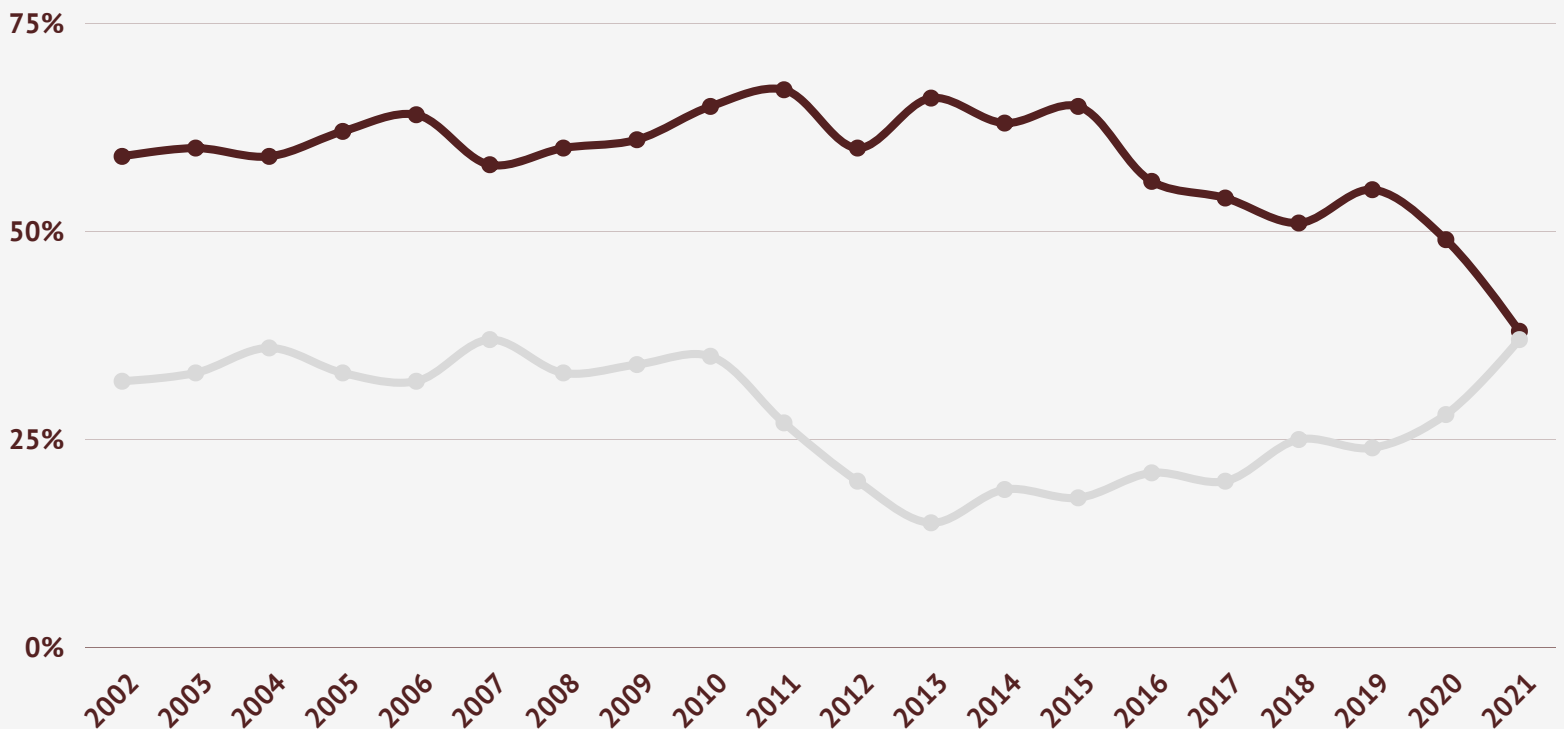
TREND DATA: TOURISM AND QUALITY OF LIFE

Much like the long term trend data mentioned in the state crowding section, Montana residents are steadily becoming more neutral in their attitude when assessing the link between increasing tourism and improving the quality of life for residents in the state. Although disagreement levels toward this statement are at similar levels to 20 years ago, the agreement level has dropped from 59% in 2002 to 38% in 2022 - a drop of 36%.

When analyzing long term trend data, it also seems that the attitude of many Montana residents was already shifting before the start of the pandemic regarding this questions as well. In the years following the Great Recession, it appears that more Montanans were sanguine about the idea of increasing tourism as a way of bolstering the economy and thereby improving the quality of life for residents within the state. However, it seems that beginning in 2016, the positive affect towards this position began to wane, as disagreement simultaneously began to increase. To find another time when these attitudes were so close together, one would have to go back to 1999, when 47% of respondents agreed while 40% disagreed.

IF TOURISM INCREASES IN MONTANA, THE OVERALL QUALITY OF LIFE FOR MONTANA RESIDENTS WILL IMPROVE

- Agree
- Disagree

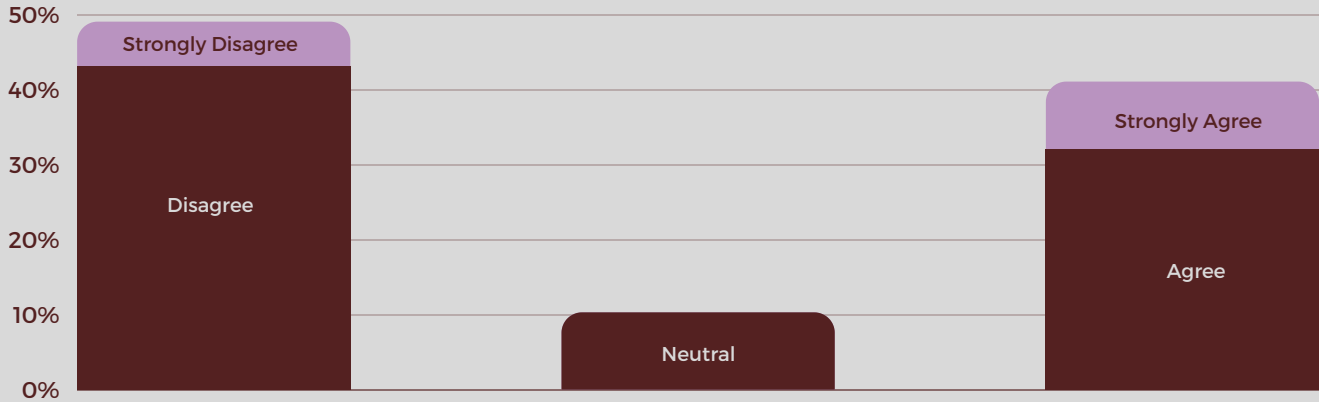


BECAUSE OF COVID-19....

I AM MORE CONCERNED ABOUT VISITORS IN MY COMMUNITY

For the second year in a row, residents were asked questions related to the COVID-19 pandemic during Q4. When asked about their concern regarding visitors in their community, just under half (49.3%) of residents surveyed either disagreed or strongly disagreed with that statement.

Conversely, 41% of respondents either agreed or strongly agreed that they were more concerned about visitors in their community because of COVID-19. The remaining 10% of respondents held a neutral opinion on the subject.

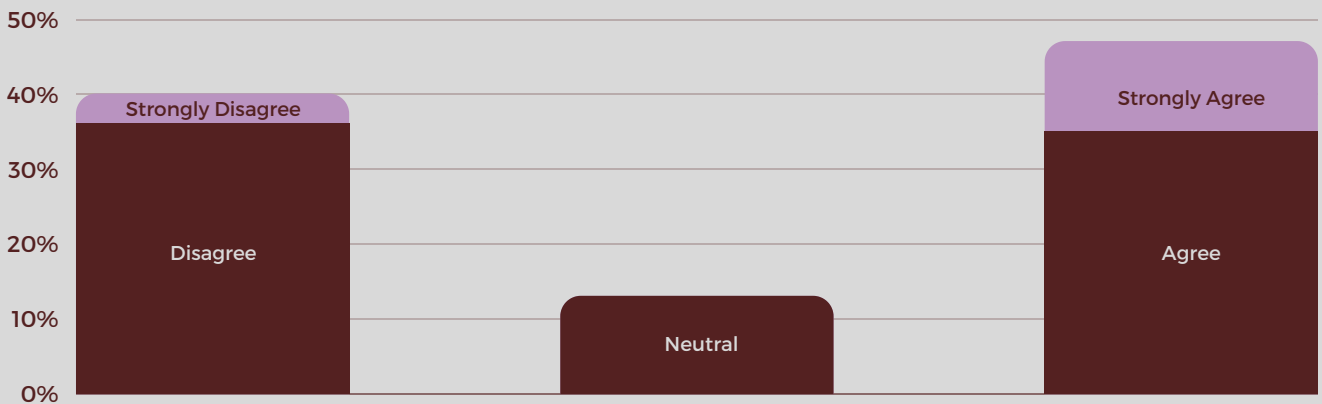


BECAUSE OF COVID-19....

I AM MORE LIKELY TO TRAVEL WITHIN MONTANA THAN OUT-OF-STATE

As for their willingness to travel in the presence of COVID-19, 47% of respondents either agreed or strongly agreed that they were more likely to travel within Montana rather than out-of-state because of COVID-19.

Forty percent of respondents either disagreed or strongly disagreed with the statement, while 13% of respondents were neutral in their assessment.



Comment Section

Finally, residents were given a chance to share any thoughts they had concerning the survey topic and the questions presented to them. Of those who provided some additional comment, the overwhelming sentiment from respondents was that any perceived overcrowding in the state was a result of people moving to Montana, rather than an overcrowding from too many tourists. According to Mike Schneider at the Independent Record, Montana experienced population growth of 1.7% from 2020 to 2021, a year in which deaths outnumbered births in the state for the first time on record.* Examples of comments from respondents are presented below and verbatim.



Migration to Montana

- "People moving here are the cause of crowding"
- "Crowding is from people moving in"
- "Economically, yes - good. Influx moving in is hurting us"



Housing

- "Cannot find a place to live and people are staying so overcrowding by staying"
- "Lived for well over twenty years twenty miles out of town. Very concerned for children as [they] want to purchase a home now and may not be able to do so"

*Mike Schneider, "Census: Montana Sees Major Population Growth While Majority of US Does Not," Helena Independent Record, December 21, 2021, https://helenair.com/news/local/census-montana-sees-major-population-growth-while-majority-of-us-does-not/article_36029cb5-014a-5eac-8f25-d8399a238b88.html#:~:text=While%202020%20saw%20deaths%20outrank,move%20here%20in%20net%20migration.

CONCLUSIONS

Quarterly Montana Resident Study

Results from this survey indicate residents have a nuanced attitude and understanding of the tourism industry within the state. A majority of respondents agree that the promotion of the tourism industry by the state benefits their community economically (83%), while also agreeing that the overall benefits outweigh the negative impacts (71%). At the same time, a majority of respondents also agree that the state is becoming overcrowded because of more tourists (56%), while just 38% of respondents agree that if tourism were to increase, that the quality of life for residents would improve.

It appears that residents are fully aware of the economic benefits tourism provides, while also recognizing the social cost from which those economic gains are derived. In addition, comments provided by residents also indicate that a portion of the crowding they perceive is not coming solely from tourists, but from the influx of new Montana residents who have moved to the state in recent years - likely as a result of changes brought on from COVID-19.

When analyzing results by travel region, there is an apparent dichotomy between respondents from Southeast MT, Missouri River Country, and Central MT in comparison to those in Glacier Country, Yellowstone Country, and Southwest MT. One difference in particular is the perceived crowding in the latter three travel regions, which are traditionally the three travel regions that shoulder the greatest burden during the peak tourist season. While those three regions are aware of the economic benefit the industry provides to their communities, it is apparent that these gains are coming at a cost, as less than 40% of respondents from each of those travel regions feel that if tourism were to increase that the quality of their lives would improve.

As mentioned, several agreement levels for some of the survey questions were the lowest ITRR has recorded in the last 30 years. ITRR will continue to track these trends moving into the 2022 tourism season. For long-term trend data, visit our Interactive Data page on our website at itrr.umt.edu.