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Montana Residents' Attitudes Towards Tourism - 2023

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INSTITUTE FOR
TOURISM & RECREATION
RESEARCH

MONTANA RESIDENTS' ATTITUDES TOWARDS TOURISM - 2023

A summary of Montana residents' attitudes towards tourism from the 2023 season.

Carter Bermingham, Megan Schultz, Matthew Pettigrew | April 2024



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The Institute for Tourism and Recreation Research (ITRR) was created in 1987 to conduct research on travel, recreation and tourism. Located in The University of Montana, W.A. Franke College of Forestry and Conservation, ITRR serves as the research arm for Montana’s tourism and recreation industry. Its overall mission is to provide information that will help the industry make informed decisions about planning, promotion and management.

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OVERVIEW

Overall, results from this study display that in general Montana residents hold a positive attitude towards tourism within the state. Similar to results in previous years, residents are aware of the economic benefit that tourism provides to their communities and agree that the overall benefits outweigh the negative impacts. In addition, perceptions of crowding at a statewide level and community level appear to be easing from record highs in recent years.

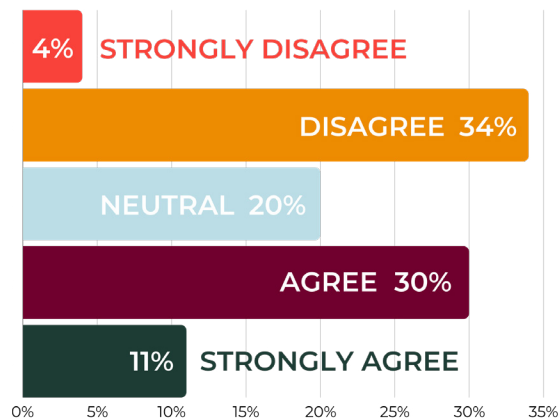
69% OF RESIDENTS AGREE THAT THE BENEFITS OF TOURISM OUTWEIGH THE NEGATIVE IMPACTS

75% OF RESIDENTS AGREE THAT TOURISM PROMOTION BY THE STATE BENEFITED THEIR COMMUNITY ECONOMICALLY

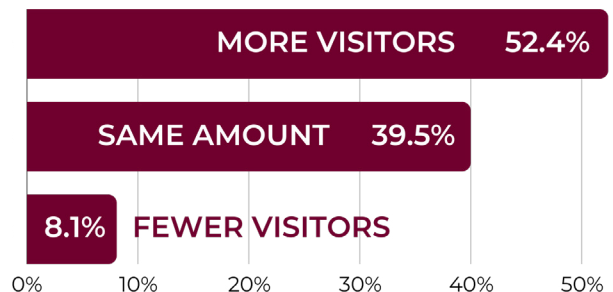
Fewer than half of the respondents (41%) agreed that the state is becoming overcrowded due to an increase in tourists, a decrease from a peak of 56% in 2021 and 49% in 2022. In a similar trend, a reduced proportion of respondents believed their community was becoming overcrowded due to an influx of visitors during the summer season, with 47% agreeing in 2023, down from 57% in the previous two years.

However, when asked about the visitor count in their community compared to 2022, a majority (52%) reported an increase in visitors last year compared to the year before, with 40% observing no change. Only 8% felt there were fewer visitors compared to 2022. This suggests that while there is a perceived reduction in overall crowding at both the state and community levels, the number of people in their communities is still believed to be on the rise.

STATE BECOMING OVERCROWDED DUE TO TOURISTS



NUMBER OF VISITORS IN COMMUNITY COMPARED TO 2022

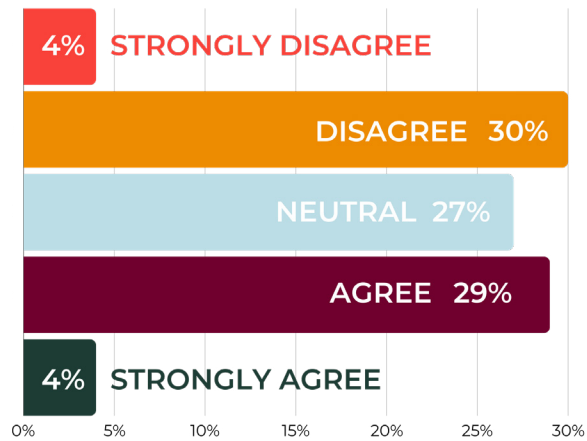


One trend worth noting, however, is the decline in the number of residents who feel that if tourism were to increase in Montana, the overall quality of life for Montana residents would improve. A third (33%) of respondents either agreed (29%) or strongly agreed (4%) with the statement, down from 35% in 2022 and 55% in 2019. For the second year in a row, the number of residents who either disagreed or strongly disagreed (39%) outweighed the number who agreed (33%).

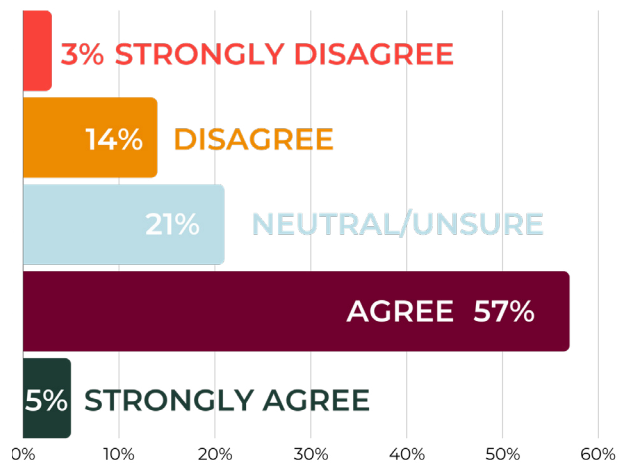
Finally, residents were asked whether they felt the number of visitors in their community was manageable, with 62% of respondents agreeing with the statement. In addition, over half of respondents (56%) felt their community had the necessary amenities needed to support tourism – up from 48% of respondents who agreed in 2022.

ITRR will continue to track these trends moving forward into 2024. For more information on the report or to segment results in ways that may be more useful to you or your organization, visit our [interactive dashboard here](#). To access long-term trend data, [click the link here](#) or visit our website at www.itrr.umt.edu.

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



THE NUMBER OF VISITORS WAS MANAGEABLE IN MY COMMUNITY THIS PAST YEAR



INTRODUCTION

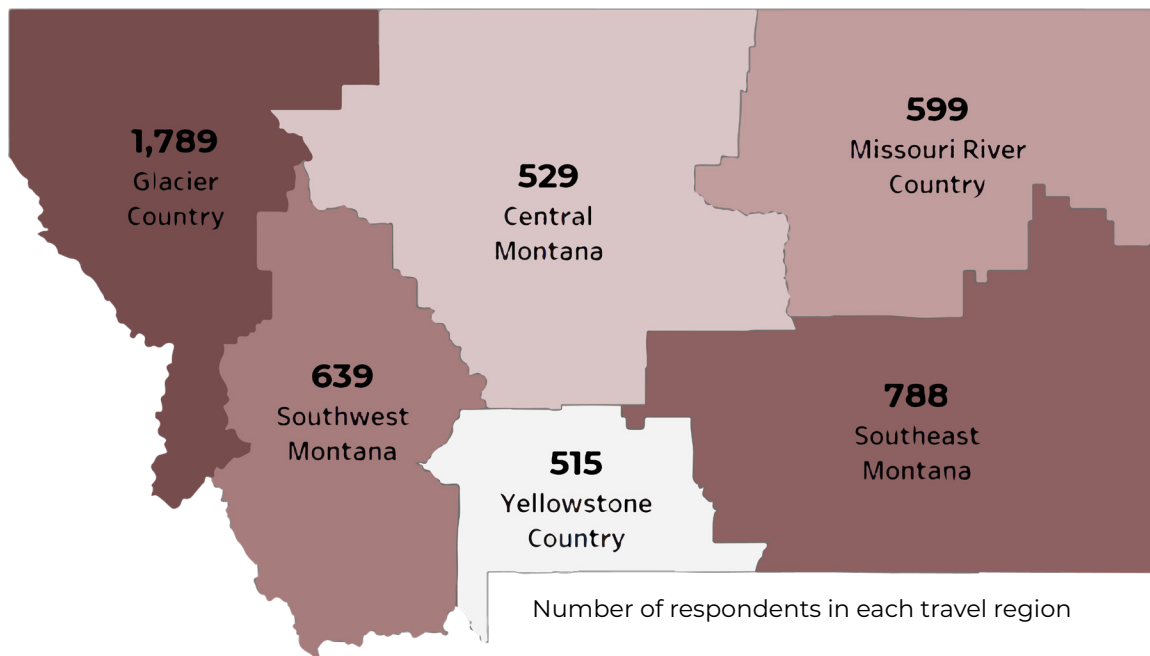
This report is a summary of Montana residents' attitudes towards tourism within the state during 2023. Since 1992, ITRR has asked residents questions specific to their attitudes towards tourism during the 4th quarter of each year (October, November, and December) as a way of tracking current perceptions as well as long term trends in sentiment towards the industry. Originally, the survey asked residents to agree or disagree with the following statements: 1) The overall benefit of tourism outweighs the negative impacts; 2) If tourism increases, the quality of life for Montana residents will improve; and 3) In recent years, the state is becoming overcrowded because of more tourists. In recent years, the study has expanded to include questions related to current events, with this year's additional questions focusing on perceptions of visitation in 2023 and whether or not residents found it to be manageable compared to differences in recent years following the COVID-19 pandemic.

STUDY PURPOSE

The purpose of this report is 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 and crowding at the community level. Respondents were also asked whether their community had the necessary level of amenities to support tourism, as well as the manageability of the 2023 tourist season, among other topics. This report also includes demographic information as well as analysis conducted at the regional level on the following areas: Glacier Country, Southwest Montana, Central Montana, Yellowstone Country, Southeast Montana, and Missouri River Country.

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 October 1st to December 31st, 2023, 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 included perceived crowding at the state and community levels, tourism and quality of life, and the benefits tourism provides, among others. 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.



SURVEY DESIGN

Standard survey questions were asked along with current issues relayed to ITRR staff from tourism partners (including representatives from Montana travel regions and convention and visitor bureaus). The survey was designed by ITRR personnel and loaded on iPads for nine surveyors located in different areas of the state. The survey was short by design (due to the amount of time available) with only 11 questions. In addition to a core set of questions that are asked every year, this survey included a few questions related to amenities needed to support tourism and whether residents felt the 2023 tourism season differed from recent years.

LIMITATIONS

This study was limited to Montana residents 18 and older who either drove or were a passenger in a vehicle during the survey period. Additionally, staffing shortages (particularly in the Central MT area) created a challenge for higher samples in the Great Falls and Helena areas.

RESPONSE RATE

The response rate was 81%, with 4,869 Montana residents responding to the survey.

Note: All findings presented in this report reflected weighted results, except for the survey demographics which are presented without weighting.

RESULTS

Results in this report are a snapshot of the overall results one can view through an interactive data portal hosted by ITRR ([click to view dashboard here](#)). These are overall results that are mostly applicable at the state level. On the interactive site, one can look at data more relevant to their area of the state and/or topics of interest. Please visit the interactive page for a more in-depth look at results.

Respondent ages ranged from 18-93, with an average age of 51.37 years. For this study, the unweighted gender breakdown was roughly 67% male and 33% female. The number of respondents by age category is shown in Table 1, and the gender breakdown is shown in Table 2.

TABLE 1: PERCENTAGE OF RESPONDENTS BY AGE

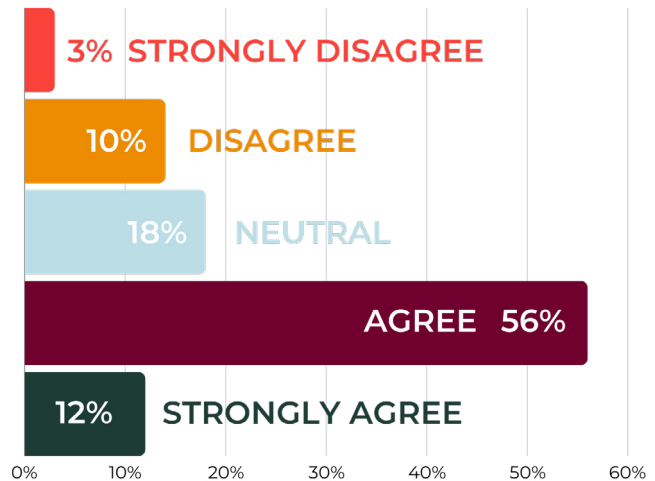
2023		N	%
Respondent Age	18 - 29	784	16%
	30 - 39	764	16%
	40 - 49	839	17%
	50 - 59	976	20%
	60 - 69	984	20%
	70 +	512	11%
	Total	4,859	100%

TABLE 2: PERCENTAGE OF RESPONDENTS BY GENDER

2023		N	%
Gender	Male	3,223	66%
	Female	1,620	33%
	Total	4,843	100%

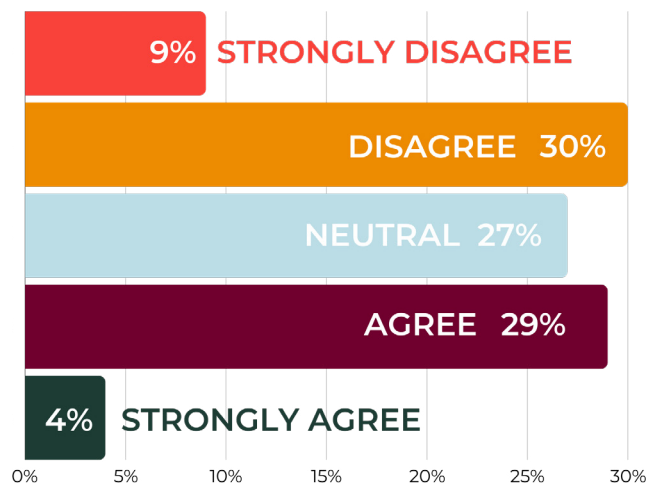
Residents were asked if they felt that the overall benefits of tourism outweighed the negative impacts on a scale from strongly disagree (1) to strongly agree (5). The majority of respondents (69%) agreed (56%) or strongly agreed (12%) that the overall benefits of tourism outweigh the negative impacts. This change represents a 2% increase in agreement from 2022. Displayed below in Figure 1 are results from the question.

FIGURE 1: THE OVERALL BENEFITS OF TOURISM OUTWEIGH THE NEGATIVE IMPACTS



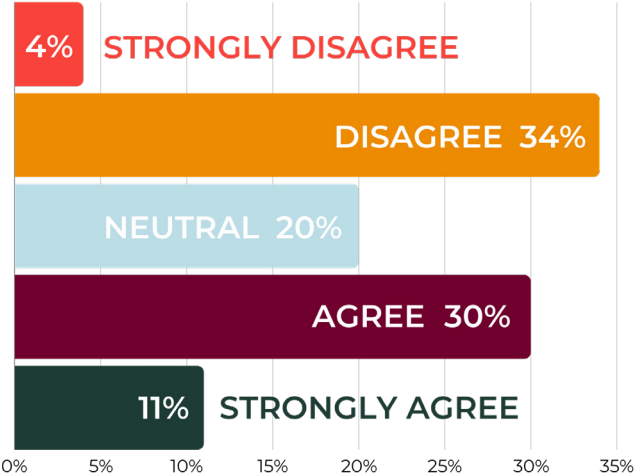
Residents were then asked if they felt their quality of life and the quality of life for other Montana residents would improve if tourism were to increase. Results for this question are displayed below in Figure 2. Overall, 33% of residents felt that the overall quality of life for Montana residents would improve if tourism were to increase. By comparison, 39% of respondents disagreed (30%) or strongly disagreed (9%) with the statement, while the remaining 27% of respondents neither agreed nor disagreed. At the regional level, 44% of respondents from Central Montana agreed or strongly agreed – the highest for any travel region. Conversely, the travel region that reported the lowest level of agreement was Glacier Country, with 26% of respondents agreeing or strongly agreeing with the statement. To segment results by travel region, respondent age, length of residency, and more, [visit our data dashboard here](#).

FIGURE 2: IF TOURISM INCREASES IN MONTANA, THE OVERALL QUALITY OF LIFE FOR MONTANA RESIDENTS WILL IMPROVE



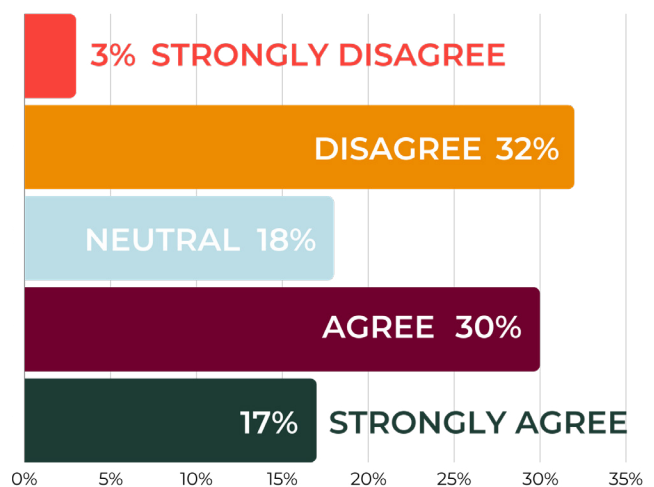
Residents were then asked about their perceptions of crowding in Montana during the height of tourism season in recent years, providing an assessment at the statewide level in addition to an assessment of their local community. Overall, 41% of respondents either agreed (30%) or strongly agreed (11%) that in recent years, the STATE is becoming overcrowded because of more tourists. In contrast, 38% of respondents disagreed (34%) or strongly disagreed (4%), while the remaining 20% of respondents were neutral. These statewide agreement levels represent a roughly 8% decrease in agreement from 2022, indicating a change in the perception of crowding levels from record-high agreement levels in 2021 (56%) and 2022 (49%). Results at the statewide level are presented below in Figure 3.

FIGURE 3: STATE BECOMING OVERCROWDED DUE TO TOURISTS



At the community level, 47% of respondents either agreed (30%) or strongly agreed (17%) that their COMMUNITY is becoming overcrowded because of more tourists during the summer season. Thirty-six percent of respondents either disagreed (32%) or strongly disagreed (4%) with the statement, while 18% were neutral. Similar to the results at the statewide level, results from 2023 show an 10% decrease in the level of agreement from 2022, indicating a change in the perception of crowding experienced by residents. When comparing results by travel region, respondents from Glacier Country (68%) and Yellowstone Country (59%) were more likely to agree that their community was becoming overcrowded during the summer season. Hence, their namesake, Glacier Country and Yellowstone Country, are the travel regions that contain Glacier National Park and Yellowstone National Park. Results from the community-level crowding question are presented below in Figure 4.

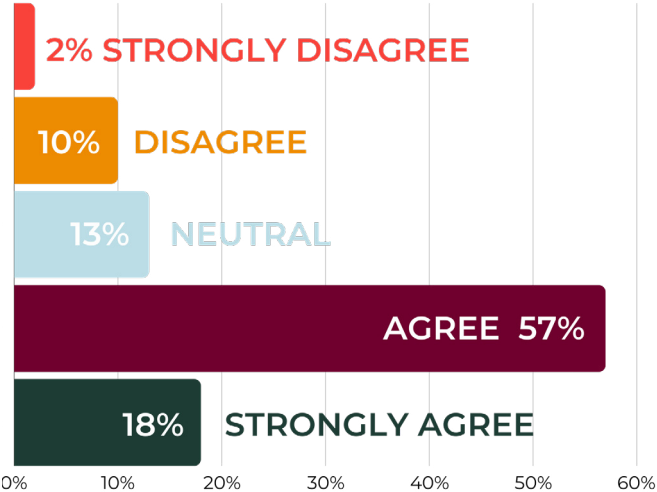
FIGURE 4: COMMUNITY BECOMING OVERCROWDED BECAUSE OF MORE TOURISTS



Billings, MT (Photo Credit – Danny Jerez)

Residents were then asked if they felt that tourism promotion by the state of Montana provided an economic benefit to their community. The majority of respondents (75%) agreed (57%) or strongly agreed (18%) that tourism promotion by the state benefited their community economically. Just 12% of respondents disagreed (10%) or strongly disagreed (2%) with the statement, while the remaining 13% of respondents were neutral. Results from 2023 indicate a 6% decrease in agreement from 2022, while the overall level of disagreement remained unchanged. Results regarding tourism promotion by the state of Montana and the economic benefit it provides to local communities are presented below in Figure 5.

FIGURE 5: TOURISM PROMOTION BY THE STATE OF MONTANA BENEFITS MY COMMUNITY ECONOMICALLY



Respondents 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 (48%) indicate they have lived in their current community for over 20 years. In addition, the largest percentage of respondents (33%) stated that they live in a community with a population of less than 5,000 people. Results regarding both the length of residency in their current community (Table 3) and the size of the community (Table 4) are displayed below.

TABLE 3: RESIDENT LENGTH OF RESIDENCY IN CURRENT COMMUNITY

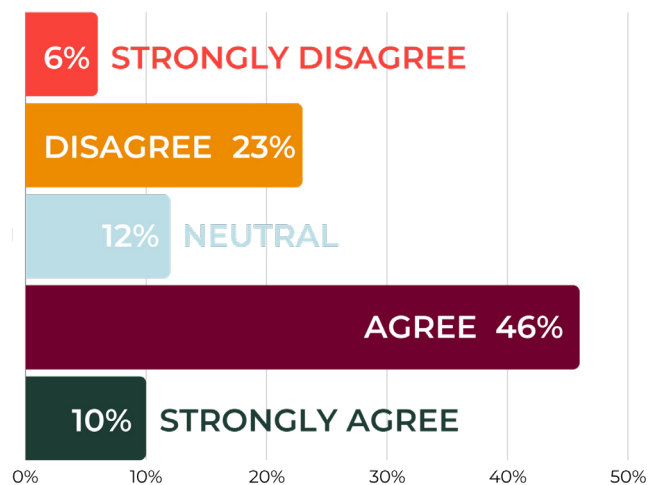
		N	%
How long have you lived in your current community?	Less than 1 year	197	4%
	1 to 5 years	816	17%
	6-10 years	659	14%
	11-20 years	834	17%
	More than 20 years	2306	48%
	Total	4,812	100%

TABLE 4: SIZE OF COMMUNITY

		N	%
Which of the following best describes the place where you live?	Rural area outside of any community borders	1523	32%
	Community less than 5,000 population	1584	33%
	Community of 5,001 to 10,000 people	689	14%
	Community of 10,001-20,000 people	153	3%
	Community of more than 20,000	861	18%
	Total	4,810	100%

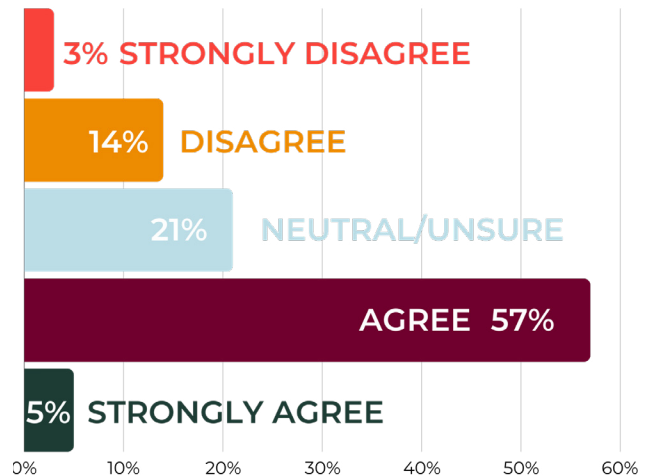
Residents were then asked a series of questions related to how manageable they felt the 2023 tourism season was for their community. In addition, respondents were asked whether they felt their community had the necessary amenities needed to support tourism. Overall, 56% of respondents agreed or strongly agreed that their community has the necessary amenities needed to support tourism. Results from 2023 indicate a 17% increase in the level of agreement from 2022, where 48% of respondents felt their community had the necessary amenities to support tourism. Results from Q4 of 2023 are presented below in Figure 6.

FIGURE 6: NECESSARY AMENITIES NEEDED TO SUPPORT TOURISM



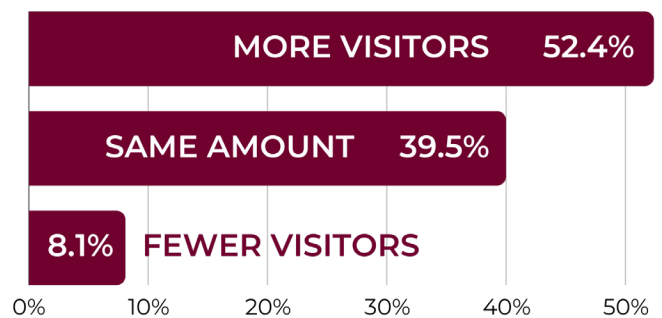
When reflecting on the year, the majority of respondents (62%) agreed or strongly agreed that the number of visitors in their community for the past year was manageable. Just 17% of respondents either disagreed (14%) or strongly disagreed (3%) with the statement, while the remaining 21% were unsure or neutral. Results are presented below in Figure 7.

FIGURE 7: THE NUMBER OF VISITORS WAS MANAGEABLE IN MY COMMUNITY THIS PAST YEAR



Finally, residents were asked to give an assessment of the number of visitors in their community compared to the 2022 tourist season. Overall, the majority of respondents (52%) felt that there were more visitors in 2023 when compared to 2022. Roughly 40% of respondents felt that there were the same number of visitors in 2023 as there were in 2022, while the remaining 8% felt there were fewer visitors in 2023 when compared to 2022. Overall results are presented below in Figure 8.

FIGURE 8: NUMBER OF VISITORS IN COMMUNITY COMPARED TO 2022



APPENDIX A - SURVEY INSTRUMENT

1) What Montana county do you live in?

On a scale of strongly disagree, disagree, neutral, agree, strongly agree:

- 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 season.
- 6) Tourism promotion by the state of Montana benefits my community economically.
- 7) My community has the necessary amenities to support tourism (This includes infrastructure needed to host visitors... examples: restaurants, lodging, attractions, etc.)
- 8) The number of visitors was manageable in my community this year.
- 9) Compared to last year, do you feel this year there were:
 - a. Fewer visitors
 - b. The same amount of visitors
 - c. More visitors
- 10) Which of the following best describes the place where you live?
 - a. Rural area outside of any community borders
 - b. Community less than 5,000 population
 - c. Community of 5,001 to 10,000 people
 - d. Community of 10,001 to 20,000 people
 - e. Community of more than 20,000
- 11) How long have you lived in your current community?
 - a. Less than 1 year
 - b. 1 to 5 years
 - c. 6-10 years
 - d. 11-20 years
 - e. More than 20 years
- 12) May I please ask in what year you were born?