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Exploring Tourism Development: Resident Attitudes in Montana: 2001

Thale Dillon
The University of Montana-Missoula

The University Travel Research Program
The University of Montana
32 Campus Drive #1234
Missoula, MT
(406) 243-5686
www.forestry.umt.edu/itrr

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Author: Thale Dillon

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EXECUTIVE SUMMARY

This report is a presentation of Montana residents' opinions and attitudes regarding tourism in their communities and in the state as a whole. A mail-back questionnaire was administered to a randomly selected sample of 1,145 Montana households during October and November 2000. The survey sequence was initiated by mailing a pre-survey notice letter to all selected households a few days prior to mailing the questionnaire. The survey mailing itself was then followed by a reminder/thank-you postcard a week later. Two weeks after mailing the postcard, a replacement survey was sent to those households who had not yet responded.

RESIDENT CHARACTERISTICS AND ATTITUDES REGARDING TOURISM DEVELOPMENT:

- Fifty-two percent of survey respondents are native Montanans. On average, they have lived in the state for 63 percent of their lives.
- Most residents report that they live in town as opposed to in a rural setting.
- The services sector was the most frequently cited source of household income.
- Tourism/recreation ranked fifth behind services, agriculture/agribusiness, retail/wholesale trade and manufacturing. A majority feels tourism should have a role in their community equal to that of other industries.
- Contact with tourists is generally infrequent, but the majority of respondents enjoy meeting and interacting with tourists.
- Survey respondents are generally attached to their community, and two-thirds feel the population in their community is increasing.
- In terms of quality of life, respondents feel that emergency services, overall community livability, safety from crime, and parks and recreation areas are in good to very good condition. They are also happy with the education system, overall cleanliness and appearance, and museums and cultural centers.
- Tourism is thought to have the most positive impact on job opportunities, as well as museums and cultural centers. Only traffic congestion is expected to be mostly negatively influenced by tourism.
- Survey respondents support tourism and tourism development, but fail to see a connection between this kind of economic development and their own benefit.
- There is some concern among respondents that tourism jobs pay low wages. Crowding seems to be of some concern, while few actually feel limited in their recreation access due to tourists.
- There is overwhelming support for land use regulation to control the type of future growth in Montana.
- Economic benefit is perceived to be the top advantage of tourism development, while crowding/traffic and tourists moving to the state are seen as the primary disadvantages.
- Most respondents were at least somewhat aware of the Bed Tax and issues associated with it.
- Operation and maintenance of state parks was the item of highest priority for funding by Bed Tax revenue.
- Although most respondents indicated they are at least somewhat informed about the travel industry in Montana, few have been exposed to information regarding the industry's impact on the state's economy, environment and quality of life.

IMPLICATIONS AND RECOMMENDATIONS

Montana residents have little knowledge of what constitutes the travel industry in the state. The perceived lack of connection between the industry and the general public is one of the main obstacles to tourism development. People do not see themselves as benefiting from this type of economic activity, and may therefore be reluctant to support it.

Further reinforcing any current opposition is feeling that Montana residents are left out in the face of tourism development. Although they do not have much knowledge of the industry, it is important to them to be involved when development decisions are made. Most residents oppose the idea of letting the private sector handle these issues alone, because any such decision will have great impacts on Montana's communities. When residents feel they are being excluded from this process, it reinforces a negative stigma associated with tourism, while imperiling the success of development projects relying on local support and participation.

Successful economic development relies on the support and cooperation of those it effects, in this case the Montana residents. To ensure this, it is necessary to inform them of what makes up the Montana travel industry. An educated public is better equipped to participate in the planning process in a positive way, and to see the connections within the industry and thus understand how and why things are done. To accomplish this, it is the responsibility of tourism developers and the travel industry to bring information to the public.

On a general level, an educational campaign should be launched to inform state residents about Montana's travel industry. On a more specific level, there are three areas that should be addressed: the economic, the social, and the environmental aspects associated with tourism.

I terms of the economic influences of the travel industry in Montana, residents need to learn how the $1.64 billion spent by tourists in the state affects multiple sectors of the economy. It is important to draw attention to the numerous sectors where jobs are in part supported by tourism, as well as the significant economic contribution of seasonal and part-time jobs in the Montana economy. Jobs in the travel industry have a reputation for paying low-wages and offering little opportunity for advancement. Details on these topics can be found in the paper Employment and Wages: The Travel Industry in Montana[1].

It is also important to explain the issues of the direct economic impact versus the indirect and induced impacts of tourism, and how the latter two benefit more people than just hotel clerks, resort owners and raft guides. For more information on this topic, see pages 2-5 of An Economic Review of the Travel Industry in Montana: 2000 Edition[2].

When considering the social influences of tourism in the state, it is obvious that these impacts are in large part tied to the economic impact and the enlarged tax base created by nonresident travel in the state. A prosperous community can better afford to improve or maintain the "quality of life" variables discussed on page 7, such as roads and highways, museums and cultural centers, parks and recreation areas, and the local education system. Being able to afford improvements in these areas will certainly affect the general level of community well-being. Having frequent visitors in the community may also serve as an incentive to keep businesses and public areas in a better condition.

There is division among the state's residents when it comes to tourism's influence on environmental conditions. Some claim that the large number of tourists who visit Montana each year cause crowding, stress on scarce resources, exclude residents from using public lands, and cause fish and wildlife resources to be depleted and not unavailable to residents. On the opposite end of the scale, there are those who see tourism as an incentive for conservation, protecting Montana's natural resources from extractive industries and unwise management practices to attract visitors. Under this approach, tourism helps protect not only scenery, wildlife and valuable habitat, but air and water quality as well. Regardless of approach, when addressing this issue, it is important to acknowledge both sides, and to address each concern specifically.

[1] Dillon, Thale. 2000. Employment and Wages: The Travel Industry in Montana. Technical Report 2000-1, University Travel Research Program, School of Forestry, The University of Montana, Missoula, MT. 9pp.
[2] Dillon, Thale and N. Nickerson. 2000. An Economic Review of the Travel industry in Montana: 2000 Edition. Institute for Tourism and Recreation Research, School of Forestry, the University of Montana, Missoula, MT. 42pp.

Publicly addressing these issues is not a guarantee for growth within the travel industry, but it should be considered essential to its continued success. A well-educated public is less likely to attack an industry and its funding sources if they understand the costs and benefits associated with it.

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INTRODUCTION

This report is intended to provide a profile of resident attitudes toward tourism in Montana in the fall of 2000, and is the result of a statewide survey administered in conjunction with the 2000/2001 Community Tourism Assessment Process. The CTAP is conducted in three Montana communities each year, and is the result of collaboration between Travel Montana, the University of Montana and the MSU Extension Service. The resident attitude questionnaire was administered to a statewide sample to serve as a comparison for individual community attitudes, as well as to monitor statewide resident attitudes over time. This report is published along with community results for Pondera and Custer counties, as well as the Fort Peck Indian Reservation.

The resident attitude questionnaire addressed a number of topics that provide a picture of perceived current conditions and tourism's role in Montana communities. The following general areas are covered in this report:

1) Methodology
2) Respondent characteristics
3) Residents' attitudes and opinions about tourism and tourism development
4) Issues related to the Lodging Facilities Use Tax
5) Level of awareness of tourism impacts

METHODOLOGY

A mail-back questionnaire was administered to a sample of Montana residents in the fall of 2000. The distribution followed an updated version of Don Dillman's Total Design Method (TDM)[3], called the Tailored Design Method, and differs slightly from previous UTRP resident attitude surveys. It is believed that these updates to the survey instrument and mailing sequence helped improve the study's response rate, which has dwindled in recent years. The response rate for this resident attitude survey exceeded 40 percent.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a selected sample of 1,145 Montana households. This letter informed recipients of the upcoming survey and alerted them to the appearance of a questionnaire in their mailbox in the near future. Shortly thereafter, a questionnaire was mailed to the same households, along with a cover letter stating in more detail the purpose and nature of the study. For the sake of random selection, this letter also requested that the adult with the most recent birthday be the one to complete the questionnaire.

One week following the questionnaire mailing, a postcard was sent, serving the dual purpose of thanking respondents for their efforts if they had already returned their questionnaire, and urging those who had set it aside to complete and return it. After two more weeks, replacement questionnaires were sent to those households that had not yet responded to the first questionnaire mailing. Included this time was a different cover letter addressing concerns residents may have that so far had kept them from responding. The cut-off day for accepting returned questionnaires was four weeks following the last mailing.

A non-response bias check was not conducted at the conclusion of the survey effort. Such bias checks generally take the form of a telephone interview to determine if those in the sample who did not respond to the questionnaire differ on key issues from those who did respond. In this case, the key questions where opinions may have differed involve statements of support for tourism development. These key questions can only be answered after considering other questions asked in the survey. It was therefore not possible to develop a condensed telephone non-response questionnaire.

The sample was randomly selected from all Montana households, and represents each of the state's 56 counties proportionately to county population. The reader is cautioned to bear in mind that the results presented here are the opinions of 42 percent of the Montana residents polled (Table 1). It is assumed that respondents did not differ from non-respondents in their opinions. Because the age distribution of the survey respondents differed from the July 1, 1999, Montana census estimates of age groups[4], responses were weighted to more closely reflect the population of the state. Results presented in this report reflect the adjusted dataset.

[3] Dillman, Don A. 2000. Mail and Internet Surveys: The Tailored Design Method. John Wiley & Sons, Inc. New York, NY.
[4] MT Department of Commerce, Census and Economic Information Center. Data set CO-99-13 "Population estimates for counties by age group: July 1, 1999". Accessed at ceic.commerce.state.mt.us/Demog/estimate/pop/County/mtcty99agegroup.

Table 1: Sample Size and Response Rate

	Statewide
Resident questionnaires mailed out	1,145
Undeliverable questionnaires	188
Usable questionnaires returned	401
Response Rate	42%

Respondent Characteristics

Age and gender, as well as length of residency in the state and in respondents' respective communities were explored in this section of the survey.

Age and gender: Respondents were asked to indicate their gender as well as their age (Table 2).

Forty-eight percent of respondents were male, while 52 percent were female. On a statewide level, the actual male/female ratio is approximately 50/50. The average age was 52 years, with the oldest respondent being 89 years old and the youngest respondent being 18 years old.

Table 2: Age and Gender Characteristics

	Statewide
Percent male	48%
Percent female	52%
Average age	52 years
Oldest respondent	89 years
Youngest respondent	18 years

Residence: Survey respondents were asked if they were born in Montana, as well as how long they have lived in their respective communities and in the state (Tables 3 and 4).

A little over half of survey respondents were born in Montana. They have lived in their community for an average of 24 years, or 46 percent of their life, and in the state for an average of 33 years, or 63 percent of their life. Twenty percent reported that they have lived in their community longer than 40 years, while 32 percent have lived in their community for 10 years or less.

Table 3: Residency Characteristics

	Statewide
Born in Montana	52%
Mean years lived in community	24 years
Mean years lived in state	33 years
Percentage of average life spent in community	46%
Percentage of average life spent in state	63%

Table 4: Community Residency

	Statewide
10 years or less	32%
11 to 20 years	17%
21 to 30 years	20%
31 to 40 years	11%
41 to 50 years	7%
51 to 60 years	8%

61 years or more	5%

Employment Status: A person's employment status, type of job and sector of employment can all influence support for tourism development in the state or in a community. In general, the more dependent a person is financially on the travel industry, the greater his or her support for tourism (Tables 5 and 6).

The most common source of household income for respondents was the service sector (28%). Other frequently cited sources of household income include government (16%), wholesale/retail trade (14%) and agriculture (14%). Approximately 4 percent of households reported that they derive some portion of their income from the travel industry. However, employees in the trade and service sectors may unknowingly be part of Montana's travel industry. Respondents who indicated "Services" as a source of household income were asked to specify the section of the service industry in which they were employed in an effort to identify possible overlaps between the travel industry and the service industry. Obvious overlaps include restaurant/bar and the hotel industry, but those employed within professional services and auto repair are also very likely to supply some of their services to tourists or tourist businesses.

Table 5: Source of Household Income

	Percent of households deriving income from sector*
Services	28%
Government	16%
Wholesale/Retail trade	14%
Agriculture	14%
Construction	12%
Finance, Insurance or Real Estate (FIRE)	8%
Transportation, Communication or Utilities	7%
Manufacturing	5%
Travel industry	4%
Forestry	3%
Mining	2%

* Households can get their income from more than one source.

Table 6: Specific Services as Source of Household Income

Service Sector	Statewide
Health care/Medical care/Social work	28%
Education/Daycare	28%
Professional services	9%
Restaurant/bar*	6%
Auto repair	4%
Heating/Air/Plumbing	3%
Welding/Construction/Oil drilling	3%
Home repair/Carpentry	3%
Janitor/Maid	3%
Media	3%
Religious services	2%
Hotel industry	2%
Laundry services	2%
Garbage	1%
Fitness	1%
Computer services	1%
Hair stylist/Cosmetologist	1%
Total respondents	**114**

* The "Restaurant/Bar" category does not technically belong in the Service sector, according to the Standard Industrial Classification index. It is part of the Wholesale/Retail Trade sector in

Table 16 as “Eating and Drinking Places”. However, it is often believed to be a part of the Service sector and it is therefore included here.

Place of residence: To ensure proportionate representation of city dwellers and rural residents, the questionnaire also addressed the issue of residence location, asking if respondents live in town (urban setting) or out of town (rural setting) (Table 7).

Fifty-eight percent of respondents indicated that they live in town, leaving 42 percent who feel their residence to be rural.

Table 7: Place of Residence

	Statewide
In town (urban setting)	58%
Out of town (rural setting)	42%

Tourism and the Economy

The local economy and the role tourism and the travel industry should have in it were key issues addressed in the survey. Residents were asked how important a role they felt tourism should have in their community’s economy. In addition, they were asked to rank selected industries on a scale from 1 (most desired) to 7 (least desired) indicating which they felt would be the most desirable for their community’s future economic growth (Tables 8 and 9).

The majority (58%) of respondents feel that tourism should have a role equal to that of other industries in their local economy, while 23 percent think it should play a relatively minor role. A full 15 percent of respondents indicated that they feel tourism should have a dominant role in their local economy, while only 5 percent feel it should have no role.

When ranking tourism/recreation along with other industry segments according to economic desirability for their community, residents placed it fifth, behind services, agriculture/agribusiness, retail/wholesale trade and manufacturing.

Table 8: Role of Tourism in Local Economy

	Statewide
No role	5%
A minor role	23%
A role equal to other industries	57%
A dominant role	15%

Table 9: Most Desired Economic Development

	Rank	Mean*
Services	**1**	2.8
Agriculture/Agribusiness	**2**	3.0
Retail/Wholesale trade	**3**	3.1
Manufacturing	**4**	3.9
Tourism/Recreation	**5**	4.0
Wood products	**6**	4.8
Mining	**7**	5.8

* Scores represent mean responses measured on a scale from 1 (most desired) to 7 (least desired). The lower the score, the more desired the item.

DEPENDENCE ON TOURISM

Residents were asked about the degree to which their place of work relies on tourists for its business (Table 10).

Only 6 percent of respondents indicated that they work in places that provide a majority of their products or services to tourists or tourist businesses, whereas most of them (54%) are employed in places that are perceived as providing no products or services to tourists or tourist businesses. Forty percent fall somewhere in the middle, indicating they work for businesses that provide at least part of their goods and services to tourists or tourist businesses.

Table 10: Employment's Dependency on Tourism for Business

	Statewide
My place of work provides the majority of its products or services to tourists or tourist businesses.	6%
My place of work provides part of its products or services to tourists or tourist businesses.	40%
My place of work provides none of its products or services to tourists or tourist businesses.	54%

INTERACTIONS WITH TOURISTS

The extent of interaction between tourists and residents colors the attitudes and opinions residents hold toward tourism in general. In turn, an individual's behavior is a reflection of those same attitudes and opinions. Respondents were asked questions to determine the extent to which they interact with tourists on a day-to-day basis, as well as the quality of those interactions (Tables 11 and 12).

When asked about the frequency of their interactions with tourists, 14 percent of statewide respondents reported having frequent contact with tourists. Twenty-three percent indicated that that they have somewhat frequent contact, and 27 percent said they have somewhat infrequent contact with those coming to visit their community. The largest portion of respondents (36%) indicated that they have infrequent contact with tourists visiting their community.

Almost two-thirds (65%) reported that they enjoy meeting and interacting with tourists. Twenty-eight percent are indifferent with regards to meeting and interacting with tourists, while only 7 percent stated that they do not enjoy these interactions.

Table 11: Frequency of Contact with Tourists Visiting Community

Degree of Frequency	Statewide
Frequent Contact	14%
Somewhat frequent contact	23%
Somewhat infrequent contact	27%
Infrequent contact	36%

Table 12: Attitude Towards Tourists Visiting Community

Attitude	Statewide
Enjoy meeting and interacting with tourists	65%
Indifferent about meeting and interacting with tourists	28%
Do not enjoy meeting and interacting with tourists	7%

Community Attachment and Change

One measure of community attachment is the length of time and portion of life spent in a community or area. These statistics were reported earlier in the report (Table 3). Another measure is based on opinions that residents have about their community and perceived changes in population numbers (Tables 13, 14 and 15).

Respondents indicated their level of agreement with each of four statements on a scale from 1 (strongly disagree) to 4 (strongly agree). A response greater than 2.5 indicates agreement.

The Index of Community Attachment (i.e. the mean of the following 4 community attachment statements) indicates that statewide respondents are indeed attached to their community. An average rating of 3.1 shows that Montana residents like living in the state. They were very positive in their feelings about their community, except in regard to opinions about the future. At 2.6, this item received a score which is only marginally above the neutral point of 2.5, indicating that residents are somewhat doubtful when it comes to the future of their community.

Residents were also asked whether they perceive the population of their community to be changing, and if so, how and at what rate. A mere 16 percent of respondents feel that the population in their community is unchanging. Sixty-three percent feel the population is increasing, while 21 percent feel it is decreasing. Of those who indicated that the population of their community is increasing, about half (51%) feel this is happening at the right rate. However, a full 45 percent feel this increase is occurring too fast. Of those who indicated that the population in their community is decreasing, the vast majority (89%) feels it is decreasing too fast. Eight percent are happy with the perceived rate of decrease, while 3 percent feel the rate of decrease is too slow.

Table 13: Community Attachment Statements

	Statewide Mean*
I'd rather live in my community than anywhere else.	3.1
If I had to move away from my community, I would be very sorry to leave.	3.1
I think the future of my community looks bright.	2.6
It is important that the residents of my community be involved in decisions about tourism.	3.4
Index of Community Attachment**	**3.1**

* Scores represent mean responses measured on a scale from 1 (strongly disagree) to 4 (strongly agree).
** Index score is the average of the mean scores for the four community attachment statements.

Table 14: Perceptions of Population Change

	Statewide*
Population is not changing	16%
Population is increasing	63%
Population is decreasing	21%

*This question asked respondents to consider the population of their home community rather than the state. Because the survey is confidential, it is not possible to correlate each respondent with his/her community and evaluate the validity of responses for all communities in the state. City and county population data can be found at http://ceic.commerce.state.mt.us.

Table 15: Rate of Population Change

	Statewide
If you feel the population in your community is increasing, how would you describe the change?	
Population is increasing too fast	45%
Population is increasing at the right rate	51%
Population is increasing too slowly	4%
If you feel the population in your community is decreasing, how would you describe the change?	
Population is decreasing too fast	89%
Population is decreasing at the right rate	8%
Population is decreasing too slowly	3%

CURRENT CONDITIONS OF AND TOURISM'S INFLUENCE ON QUALITY OF LIFE

The concept of "Quality of Life" can be broken down into several individual factors, including the availability and quality of public services, infrastructure, stress factors such as crime and unemployment, and overall livability issues such as cleanliness. When evaluating the potential for community tourism development, it is necessary to get an understanding for residents' opinions of the current quality of life in their community, as well as the influence they think tourism will have.

To that end, respondents were asked to rate the current conditions of a number of factors that influence their quality of life by using a 5-point scale ranging from 1 ("Very poor condition") to 4 ("Very good condition"), in addition to a "Don't know" option. They were also asked to rate the influence they thought increased tourism would have on these factors using a scale including "Positive Influence", "Both positive and negative influence", "Negative influence", "No influence" and "Don't know" (Tables 16 and 17).

Generally speaking, statewide respondents are satisfied with current quality of life variables in their community. The only two items to receive a rating of poor condition were job opportunities and cost of living, although the condition of roads and highways seem to be of some concern as well. The majority of respondents (51%) indicated that they expect increased tourism development to have a positive influence on the availability of jobs, but are not as confident when it comes to the influence on cost of living.

Montana's overall community livability, emergency services, parks and recreation areas, safety from crime, museums and cultural centers, the education system, and overall cleanliness and appearance were all deemed to be in good to very good condition. Tourism development is expected to further improve the condition of museums and cultural centers, as well as parks and recreation areas, and to have both a positive and negative influence on the remaining quality of life variables. Traffic congestion is the only variable which is expected to be mostly negatively influenced by increased tourism development.

Table 16: Quality of Life—Current Condition

	Statewide Mean*
Emergency services	3.2
Overall community livability	3.2
Parks and recreation areas	3.1
Safety from crime	3.1
Museums and cultural centers	3.0
Education system	3.0
Overall cleanliness and appearance	3.0
Traffic congestion	2.8
Infrastructure	2.8
Conditions of roads and highways	2.5
Cost of living	2.3
Job opportunities	2.0

* Scores represent mean responses measured on a scale from 1 (very poor condition) to 4 (very good condition). The higher the score, the better the perceived condition of the item.

Table 17: Quality of Life—Tourism's Influence

	Statewide*				
	No influence	Negative Influence	Positive & Negative Influence	Positive Influence	Don't know
Emergency services	17%	13%	38%	18%	14%
Overall community livability	13%	13%	42%	23%	9%
Parks and recreation areas	6%	14%	32%	43%	5%
Safety from crime	13%	28%	40%	10%	9%
Museums and cultural centers	8%	2%	13%	70%	7%
Education system	40%	8%	21%	19%	12%
Overall cleanliness and appearance	9%	20%	40%	23%	8%
Traffic congestion	7%	54%	25%	9%	5%
Infrastructure	26%	18%	28%	12%	16%
Conditions of roads and highways	6%	29%	34%	25%	6%
Cost of living	13%	26%	30%	17%	14%
Job opportunities	10%	8%	25%	51%	6%

* Percentages may not add to 100 due to rounding.

In addition to considering tourism's perceived influence on quality of life, another method of measuring the degree of support for tourism development is to ask respondents questions about specific aspects of tourism. Respondents were asked to indicate their level of agreement or disagreement with a number of tourism-related statements. Responses ranged from 1 ("Strongly disagree") to 4 ("Strongly agree"). As before, a score greater than 2.5 indicates agreement, while a score of less than 2.5 indicates disagreement. The statements dealt with issues such as tourism support, tourism concerns and land use.

INDEX OF TOURISM SUPPORT

Some of the statements addressed general support for tourism development while others addressed more specific aspects of tourism (Table 18).

Most statewide respondents (76%) agree that tourism promotion and advertising to out-of-state visitors by the state of Montana is a good idea and would like to see this continued. A full 66 percent feel that their community is a good place for tourism investment, while 60 percent believe increased tourism will help their community grow in the right direction. Sixty-nine percent of respondents also feel that the negative impacts of tourism are outweighed by its benefits. Almost three-fourths of state respondents (72%) feel that tourism promotion by the state benefits their county economically, while over half (52%) believe that jobs in the travel industry offer opportunities for advancement. Forty-three percent feel that the overall quality of life for Montana residents will improve with increased tourism. On the downside, a majority of respondents (69%) do not see a connection between increased tourism in their community or a more secure income for themselves, just as 72 percent do not think that increased tourism will lead to any financial benefit on their part.

When considering the responses to these statements, there is an impression of overwhelming support for tourism. However, the index score of 2.5, right at the neutral point, is an indication that this support is tempered by the apparent lack of connection between community tourism development and personal financial or economic benefit. The failure to recognize the connection between tourism development and personal benefit may be one of the main obstacles currently facing this type of economic activity in the state. However, the index score is neutral rather than negative, so it seems that the desire for development that benefits communities outweighs the negative concern regarding lack of personal benefit from increased tourism. It is also worth noting that statewide respondents give positive responses to the other topic-specific statements in the index.

Table 18: Tourism Support Statements

	Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	7%	17%	62%	14%	2.8
My community is a good place to invest in tourism development.	7%	27%	49%	17%	2.8
Increased tourism would help my community grow in the right direction.	9%	31%	47%	13%	2.6
The overall benefits of tourism outweigh the negative impacts.	10%	21%	58%	11%	2.7
Tourism promotion by the state of Montana benefits my community economically.	6%	22%	60%	12%	2.8
I believe jobs in the tourism industry offer opportunity for advancement.	12%	36%	47%	5%	2.5
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	13%	44%	39%	4%	2.4
If tourism increases in my community, my income will increase or be more secure.	22%	47%	25%	6%	2.1
I will benefit financially if tourism increases in my community.	24%	48%	22%	6%	2.1
Index of Tourism Support**	**2.5**				

* Scores represent mean response measured on a scale from 1 (strongly disagree) to 4 (strongly agree).
** The Index of Tourism Support is the mean of the average score for each statement.

INDEX OF TOURISM CONCERN

The main issues of concern regarding tourism development deal with wage levels and crowding (Table 19).

Three-fourths (75%) of statewide respondents believe that most tourism jobs pay low wages. Over half (55%) feel that tourists do not pay their fair share for the services they use, while another 55 percent agree that vacationing in Montana influences too many people to move to the state. Forty-one percent of respondents feel that the state is becoming too crowded because of tourists, but only 33 percent feel that out-of-state visitors limit their access to recreation opportunities.

In this index, a higher score means a higher level of concern, and statewide respondents scored marginally above the neutral point of 2.5, due in large part to the level of concern exhibited on the wage issue. As a point of interest, UTRP estimates indicate that the average hourly wage for persons employed in the travel industry is $8.47, well above minimum wage[5].

There is also some concern regarding crowding in the state, an issue which is very regional in nature, pitting the frequently-visited western part of the state against the less-traveled eastern part. Looking at the state as a whole, these are clearly areas of concern, and as such should be addressed by developers to facilitate this type of economic activity.

Table 19: Tourism Concern Statements

	Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I believe most of the jobs in the tourism industry pay low wages.	2%	23%	53%	22%	2.9
Tourists do not pay their fair share for the services they use.	5%	40%	36%	19%	2.7
Vacationing in Montana influences too many people to move to the state.	5%	40%	32%	23%	2.7
In recent years, Montana is becoming overcrowded because of more tourists.	9%	50%	25%	16%	2.5
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	12%	55%	21%	12%	2.3
Index of Tourism Concern**	**2.6**				

* Scores represent mean response measured on a scale from 1 (strongly disagree) to 4 (strongly agree).
** The Index of Tourism Concern is the mean of the average scores for each statement.

[5] Dillon, Thale. 2000. Employment and Wages: The Travel Industry in Montana. Technical Report 2000-1, University Travel Research Program, School of Forestry, The University of Montana, Missoula, MT. 9pp.

LAND USE ISSUES

Montana has a rich land heritage that appeals to residents and visitors alike. A large part of Montana's charm is related to its wide-open spaces, and residents are naturally sensitive with respect to how this resource is treated. Respondents were asked to express their agreement or disagreement with several statements related to land use issues, using the familiar 4-point scale (Table 20).

Among statewide respondents, 63 percent agree that there is adequate undeveloped open space in their community. Over half (58%) are concerned about its disappearance. Almost three-fourths (72%) of statewide respondents are supportive of some form of land-use regulations to control the types of future growth in their community. Only 33 percent feel their recreation opportunities are limited due to the presence of tourists.

Table 20: Land Use Issues

	Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
There is adequate undeveloped open space in my community.	7%	30%	49%	14%	2.7
I am concerned with the potential disappearance of open space in my community.	9%	33%	34%	24%	2.7
I would support land use regulations to help manage types of future growth in my community.	9%	19%	56%	16%	2.8
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	12%	55%	21%	12%	2.3

* Scores represent mean responses measured on a scale from 1 (strongly disagree) to 4 (strongly agree).

TOURISM-RELATED DECISION-MAKING

Residents have strong feelings about participating in decisions that will ultimately affect their community and their own lives. Survey recipients were asked to respond to two statements related to who should be making decisions about tourism in their community. Again, a 4-point scale was used (Table 21).

Most respondents feel strongly that residents should be involved in the decision-making process when it comes to tourism development. Ninety-five percent either agreed or strongly agreed that it is important that residents be involved in decisions about tourism, while 61 percent disagreed that decisions regarding tourism volume are best left to the private sector.

Table 21: Tourism-Related Decision-Making

	Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*
It is important that residents of my community be involved in decisions about tourism.	1%	4%	52%	43%	3.4
Decisions about how much tourism there should be in my community are best left to the private sector.	21%	40%	26%	13%	2.3

* Scores represent responses measured on a scale from 1 (strongly disagree) to 4 (strongly agree).

ADVANTAGES AND DISADVANTAGES OF TOURISM DEVELOPMENT

To further understand the perceived benefits and costs of tourism development, respondents were asked what they thought would be the top advantage and disadvantage of increased tourism in their community. These were open-ended questions where respondents provided their thoughts in their own words. The responses were then assigned to general categories to facilitate comparison (Tables 22 and 23).

The top advantage of tourism identified by survey respondents was overall economic benefit. Seventy-three percent of respondents indicated more jobs, higher income and higher revenue for local businesses as the top advantages of increased tourism in their community. Eight percent stated that they feel there are no advantages associated with tourism development. In terms of disadvantages, more traffic and crowding was of concern to a large portion of statewide respondents (38%), as was tourists moving to the state after visiting (10%). Nine percent stated that they see no disadvantages from tourism development.

Table 22: Advantages Associated with Increased Tourism

	Statewide*
Economic benefit	73%
Potential for growth	9%
No advantage	8%
More services available	2%
Cultural integration/learning	2%
Income from the bed tax	2%
Increased awareness	2%
Increased population	1%
Better roads	1%
Cleaner parks, recreation areas	1%

* Respondents could offer more than one suggestion.

Table 23: Disadvantage Associated with Increased Tourism

	Statewide
Crowding/traffic	38%
Tourists moving here	10%
No disadvantage	9%
Increased crime	7%
Over-use/damage of scarce resources	6%
Decreased quality of life	5%
Increased cost of living	4%
Condition of roads	4%
Stress on local infrastructure	4%
Pollution/Noise pollution	3%
Tourists don't pay their fair share	3%
Litter	3%
Abuse of facilities	2%
Low-wage jobs	2%
Trespassing	1%
Economic dependency	1%
Commercialization	1%

* Respondents could offer more than one suggestion.

RESIDENTS' OPINIONS REGARDING THE LODGING FACILITY USE TAX

During the summer of 1998, the Bed Tax Futures Committee appointed by the Tourism Advisory Council held four meetings around the state to examine the bed tax and its allocation structure. As an extension of those discussions, the Resident Attitude Survey started to address residents' knowledge of the tax and opinions on its use.

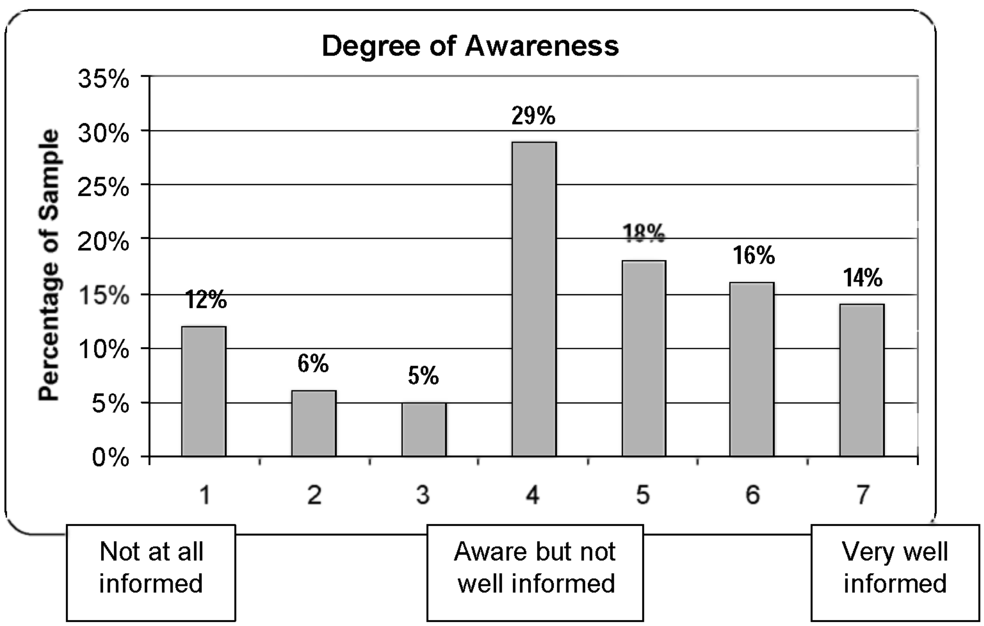
Respondents were asked about their familiarity with the Lodging Facility Use Tax (Bed Tax) prior to reading a description of it in the survey. Responses were registered on a scale from 1 ("Not at all informed") to 7 ("Very well informed"). The mid-point of 4 represented "Aware but not well informed".

Only 12 percent indicated that they feel they are not at all informed about the bed tax issue, whereas 14 percent feel they are very well informed. Twenty-nine percent indicated that they are aware of the tax but not well informed. A total of 23 percent feel they are less than aware of the bed tax issue, while 48 percent feel they are more than just aware of it (Figure 1).

The survey provided this brief description of the Bed Tax:

> Montana currently collects a 4% tax on overnight accommodations (i.e. hotels, motels, resorts, private campgrounds). This tax is popularly called the "Bed Tax" and generates revenue to support tourism promotion, tourism research, state parks, historical signage, and so on.

Figure 1: Awareness of the Lodging Facility Use Tax



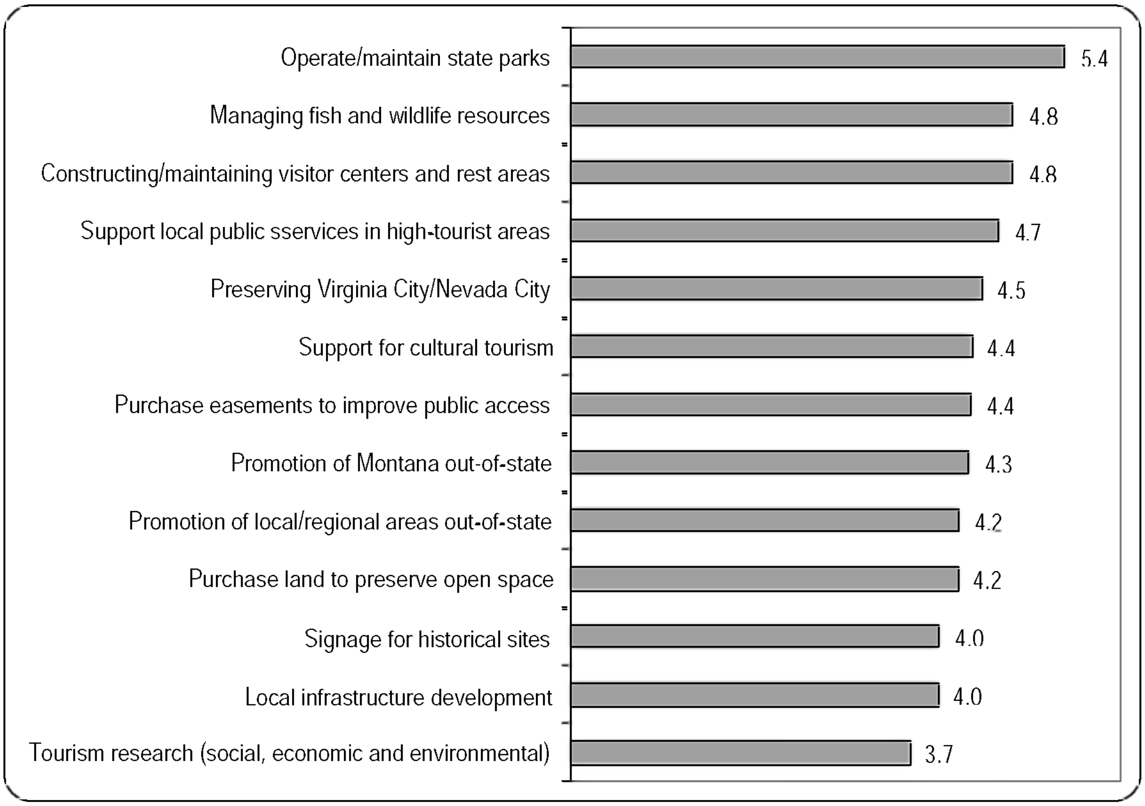
Respondents were also asked to rate 13 items on a scale from 1 (low priority) to 7 (high priority) in terms of priority for funding from the Bed Tax. The items were derived from the current allocation structure, as well as suggestions brought forth by various individuals and entities during the Bed Tax Futures Committee's public hearings. The suggestions were included in the survey question in an effort to get public evaluation of suggested changes in the law.

Please note that the original intent of this question was to determine residents' support for funding various programs using Bed Tax revenues. However, researchers acknowledge that it falls short of reaching that goal. Residents were asked to rank the listed items in terms of priority, not to indicate the amount of funding that should be allocated to each. There is no information supplied on existing programs, and no information on other current or potential sources of funding. In addition, respondents were not given the option of choosing “No priority” for any of the items, automatically allocating at least a “Low priority” rating to all the programs on the list.

Overall, respondents indicated that operating and maintaining state parks would be their top priority for Bed Tax funds. Managing fish and wildlife resources and constructing/maintaining visitor centers and rest areas are also considered important uses of the funds, while signage for historical sites, local infrastructure development and tourism research came in at the bottom. It is important to note, however, that the top and the bottom score are separated by less than 2 points (Figure 2).

It can be argued that the ranking of these items are more a representation of how Montanans value various aspects of the state's features rather than the most appropriate way to spend funds generated through the Lodging Facilities Use Tax.

Figure 2: Priority Ratings for Bed Tax Funds*



*Represents mean score of all responses for each item; 7=high priority, 1=low priority.

RESPONDENTS' AWARENESS OF VARIOUS ASPECTS OF THE TRAVEL INDUSTRY IN MONTANA

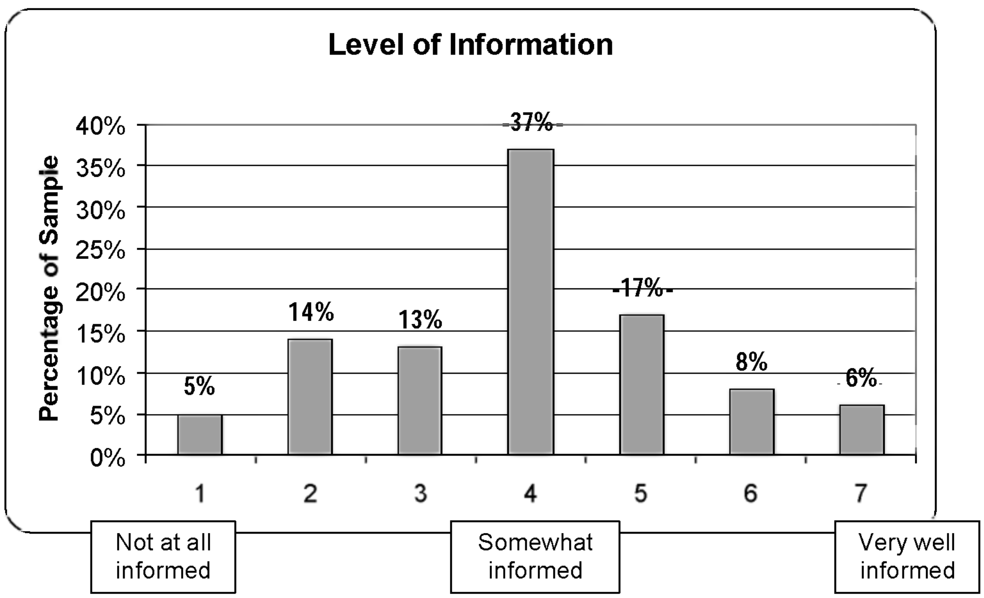
A new addition to the 2000 Resident Attitude Survey questionnaire was a set of questions dealing with information about the travel industry in Montana. There has been discussion regarding residents' lack of awareness regarding this industry and its role in the state's economy. However, it is unclear whither this lack of awareness is due to a lack of interest on the part of residents, or if it is due to a lack of information released/disseminated by the industry itself. Respondents were asked to assess how well they have been informed about the Montana travel industry in general, as well as different aspects of its impact on Montana. The aspects that were considered included impact on the state's economic conditions, environmental conditions, and quality of life.

Level of information about Montana's travel industry: Survey respondents were asked how well they felt they have been informed about the travel industry in Montana. They were asked to indicate their response on a 7-point scale from 1 ("Not at all informed") to 7 ("Very well informed"). The mid-point of 4 represents "Somewhat informed".

Five percent of respondents indicated that they are not at all informed about the travel industry in the state, while 6 percent consider themselves very well informed. The largest portion of respondents (37%) indicated that they are "somewhat" informed. Overall, 32 percent feel they are less than "somewhat" informed about the travel industry, while 31 percent feel they are more than "somewhat" informed (Figure 3). The average score, while not reflected in the figure below, was 3.9, only fractionally below the mid-point of 4.

This distribution indicates that although there may be a lack of information on the Montana travel industry actually reaching Montanans, there is also a large portion of Montana residents who have a fair amount of knowledge.

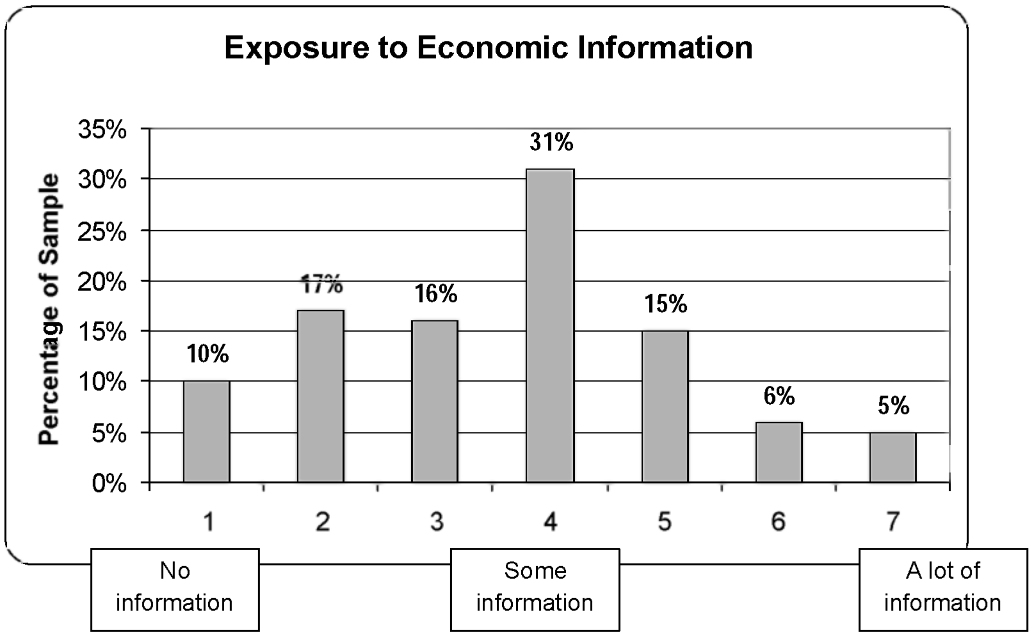
Figure 3: Level of Information on Montana's Travel Industry



The influence of the travel industry on Montana's economic conditions: While similar to the previous question, this one focuses on the economic impact that the travel industry has on Montana, and how well-informed people are on this issue. Respondents were asked how much information they have been exposed to regarding the influence of the travel industry on the state's economic conditions. Exposure to information includes actively seeking informational material, as well as receiving unsolicited information through television, radio or print media. A 7-point scale was used here as well, ranging from 1 ("No information") to 7 ("A lot of information"). The mid-point of 4 represents "Some information".

The largest portion of respondents (31%) indicated that they have been exposed to “some” information about the travel industry’s impact on economic conditions in the state. A full 43 percent, however, indicated that they have been exposed to less than “some” information. Ten percent indicated that they have been exposed to no information at all on this topic. Only 26 percent of respondents indicated that they have been exposed to more than “some” information on this issue, while only 5 percent feel they have been exposed to “a lot” of information (Figure 4).

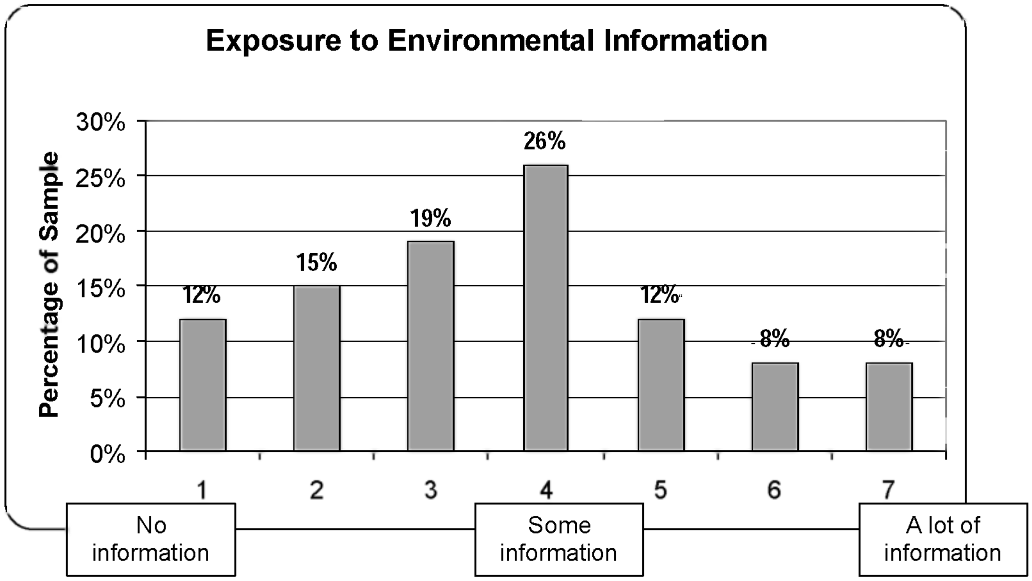
Figure 4: Exposure to Information on the Influence on Economic Conditions



The influence of the travel industry on Montana’s environmental conditions: This question focused on respondents’ knowledge of the environmental impacts of the travel industry in Montana. Survey recipients were asked to indicate how much information they have been exposed to regarding the influence of the travel industry on Montana’s environmental conditions. Again, exposure includes acquiring both solicited and unsolicited information. The same 7-point scale was used for this question as for the previous one.

Most of the respondents came in at the lower end of the distribution. Twenty-six percent indicated that they have been exposed to “some” information on tourism’s environmental impacts, and a full 46 percent indicated that their exposure amounted to less than that, with 12 percent being exposed to no information at all on the environmental impact issue. Twenty-eight percent have been exposed to more than “some” information on this topic, while a mere 8 percent indicated that they have been exposed to “a lot” of information (Figure 5).

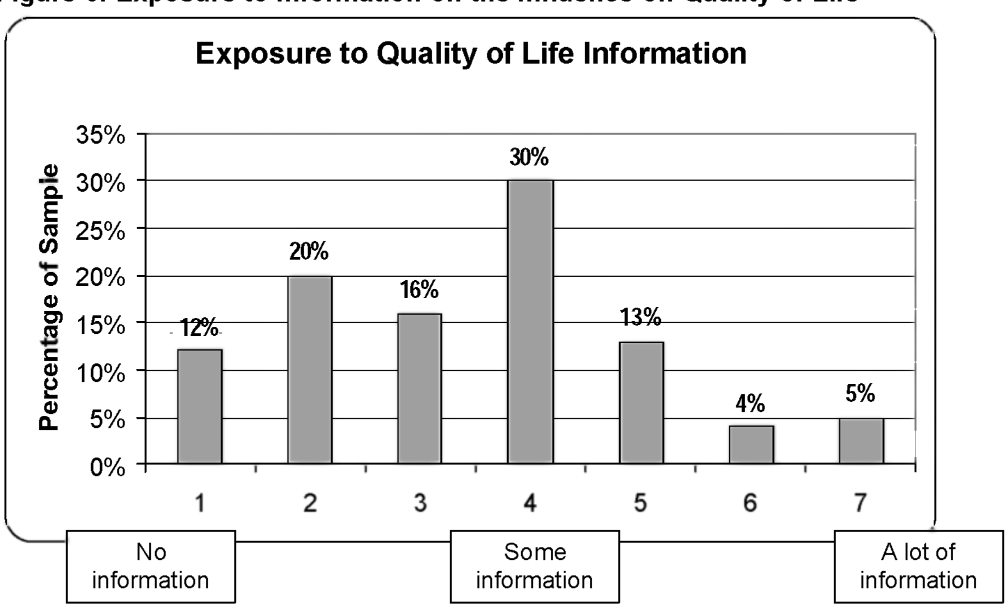
Figure 5: Exposure to Information on the Influence on Environmental Conditions



The influence of the travel industry on quality of life in Montana: This question focused on respondents' knowledge of the influence the travel industry has on quality of life in Montana. Survey recipients were asked to indicate how much information they have been exposed to regarding the influence of the travel industry on quality of life in the state. The same 7-point scale was used for this question as for the previous ones. Although no definition was given of "quality of life",-it is assumed to be a concept of fairly standard definition and association.

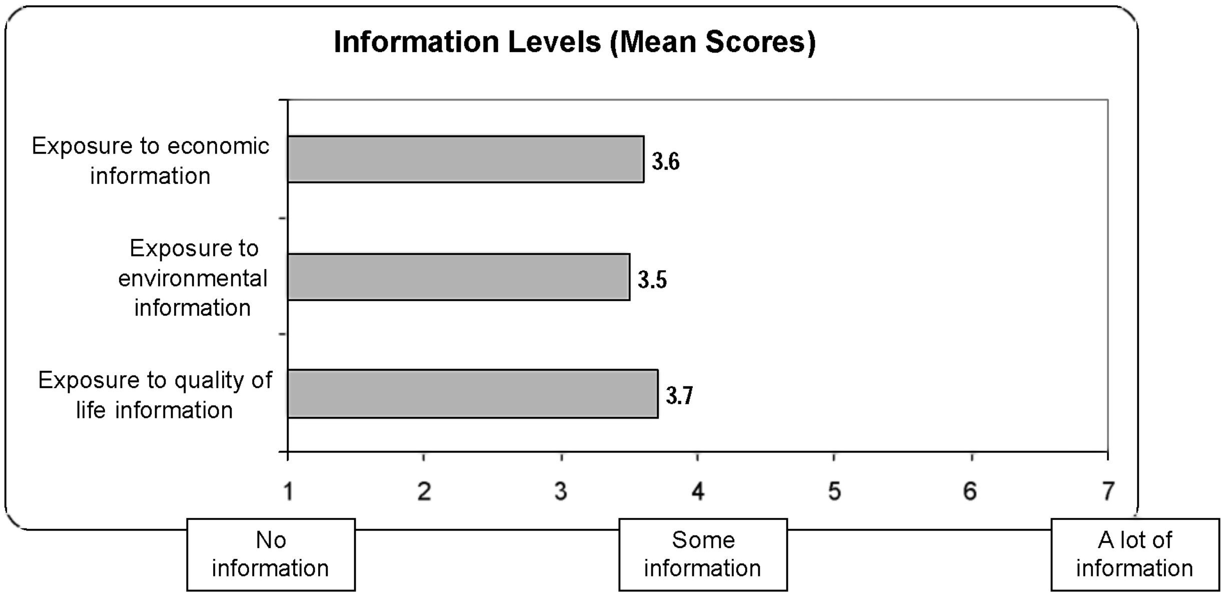
This question as well produced a distribution that is heavily weighted at the lower end. While 30 percent indicated that they have been exposed to "some" information about impacts on quality of life, an astounding 48 percent feel they have been exposed to less than "some" information about the travel industry's influence on Montanan's quality of life. Twelve percent indicated that they have not been exposed to any information on this topic at all. While 22 percent indicated that they have been exposed to more than "some" information on this issue, only 5 percent feel they have been exposed to "a lot" information on tourism's effects on quality of life in the state (Figure 6).

Figure 6: Exposure to Information on the Influence on Quality of Life



It is obvious when considering the above figures, as well as Figure 7 below, that there truly is a lack of information regarding the travel industry in Montana. While it may be the case that information does exist, as long as it does not reach its intended recipients, Montana's residents, its existence is really a moot point. Looking at the mean score computed for each information category, they all fall below the mid-point of 4 (Figure 7).

Figure 7: Comparative Information Levels



IMPLICATIONS AND RECOMMENDATIONS

(The information in this section is a repetition of the information given on page ii at the beginning of the report.)

Montana residents have little knowledge of what constitutes the travel industry in the state. The perceived lack of connection between the industry and the general public is one of the main obstacles to tourism development. People do not see themselves as benefiting from this type of economic activity, and may therefore be reluctant to support it.

Further reinforcing any current opposition is feeling that Montana residents are left out in the face of tourism development. Although they do not have much knowledge of the industry, it is important to them to be involved when development decisions are made. Most residents oppose the idea of letting the private sector handle these issues alone, because any such decision will have great impacts on Montana's communities. When residents feel they are being excluded from this process, it reinforces a negative stigma associated with tourism, while imperiling the success of development projects relying on local support and participation.

Successful economic development relies on the support and cooperation of those it effects, in this case the Montana residents. To ensure this, it is necessary to inform them of what makes up the Montana travel industry. An educated public is better equipped to participate in the planning process in a positive way, and to see the connections within the industry and thus understand how and why things are done. To accomplish this, it is the responsibility of tourism developers and the travel industry to bring information to the public.

On a general level, an educational campaign should be launched to inform state residents about Montana's travel industry. On a more specific level, there are three areas that should be addressed: the economic, the social, and the environmental aspects associated with tourism.

In terms of the economic influences of the travel industry in Montana, residents need to learn how the $1.64 billion spent by tourists in the state affects multiple sectors of the economy. It is important to draw attention to the numerous sectors where jobs are in part supported by tourism, as well as the significant economic contribution of seasonal and part-time jobs in the Montana economy. Jobs in the travel industry have a reputation for paying low-wages and offering little opportunity for advancement. Details on these topics can be found in the paper Employment and Wages: The Travel Industry in Montana[6].

It is also important to explain the issues of the direct economic impact versus the indirect and induced impacts of tourism, and how the latter two benefit more people than just hotel clerks, resort owners and raft guides. For more information on this topic, see pages 2-5 of An Economic Review of the Travel Industry in Montana: 2000 Edition[7].

When considering the social influences of tourism in the state, it is obvious that these impacts are in large part tied to the economic impact and the enlarged tax base created by nonresident travel in the state. A prosperous community can better afford to improve or maintain the "quality of life" variables discussed on page 7, such as roads and highways, museums and cultural centers, parks and recreation areas, and the local education system. Being able to afford improvements in these areas will certainly affect the general level of community well-being. Having frequent visitors in the community may also serve as an incentive to keep businesses and public areas in a better condition.

There is division among the state's residents when it comes to tourism's influence on environmental conditions. Some claim that the large number of tourists who visit Montana each year cause crowding, stress on scarce resources, exclude residents from using public lands, and cause fish and wildlife resources to be depleted and not unavailable to residents. On the opposite end of the scale, there are those who see tourism as an incentive for conservation, protecting Montana's natural resources from extractive industries and unwise management practices to attract visitors. Under this approach, tourism helps protect not only scenery, wildlife and valuable habitat, but air and water quality as well. Regardless of approach, when addressing this issue, it is important to acknowledge both sides, and to address each concern specifically.

Publicly addressing these issues is not a guarantee for growth within the travel industry, but it should be considered essential to its continued success. A well-educated public is less likely to attack an industry and its funding sources if they understand the costs and benefits associated with it.

[6] Dillon, Thale. 2000. Employment and Wages: The Travel Industry in Montana. Technical Report 2000-1, University Travel Research Program, School of Forestry, The University of Montana, Missoula, MT. 9pp.
[7] Dillon, Thale and N. Nickerson. 2000. An Economic Review of the Travel industry in Montana: 2000 Edition. Institute for Tourism and Recreation Research, School of Forestry, the University of Montana, Missoula, MT. 42pp.

General Comments

Survey recipients were given space at the end of the survey form to include their own thoughts and comments. This was an open-ended format with no guidelines as to the topic of the comments, and thus they deal with a wide variety of issues. There is little consensus in terms of issues raised as most are mentioned by only one or two respondents. Therefore, these comments should not be considered as indicators of the general opinion of the sample, let alone Montana's residents (Table 24).

Table 24: General Comments

Comment	Count*
Tourism and recreation are important to Montana in preserving natural beauty.	5
A sales tax would even out the burden from tourists on infrastructure and the environment.	3
Jobs created by tourism are low-wage service jobs.	3
Most tourist dollars are spent in western Montana because that's where tourists want to be.	2
Tourism is not a big factor in north-eastern Montana.	2
Campgrounds are always overcrowded.	2
More money should be allocated to local businesses instead of tourist attractions.	2
Tourism raises the cost of living.	2
Land is the best resource left.	2
The bed tax should not apply to MT residents	1
Tourism will not replace the natural resource industry.	1
I am happy to see the end of the tourist season.	1
Hunting and fishing supports many small Montana towns.	1
Tourism/recreation less destructive than other economic activities in terms of the environment and quality of life.	1
Hunters are asking to use land.	1
Boat fees would lessen citizens' cost.	1
Tourism may attract new businesses to keep small communities alive.	1
High prices on fuel and transportation may reduce number of tourists, making Montana residents pay.	1
Revenue from tourists will never equal the revenue lost by closing mining.	1
Tourism is 20 percent of the state economy.	1
Tourism revenue mismanaged and spent by government.	1
Tourism requires improving roads which raises taxes to pay for it.	1
Low-wage jobs force people to move to make a living.	1
We must control the growth of large subdivisions.	1
Traffic during peak tourist season becomes dangerous.	1
Montana cannot be supported by government jobs alone; need tourism to supply jobs.	1

* Number of respondents who raised the issue.

Appendix A:

Montana Survey Instrument