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Residents' Attitudes Towards Tourism - 4th Quarter 2020

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Residents' Attitudes Towards Tourism: 4th Quarter 2020

MT Expression Research Report 2021-2

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2/4/2021



Photo courtesy of Jacob W. Frank & Yellowstone National Park

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Residents' Attitudes Towards Tourism

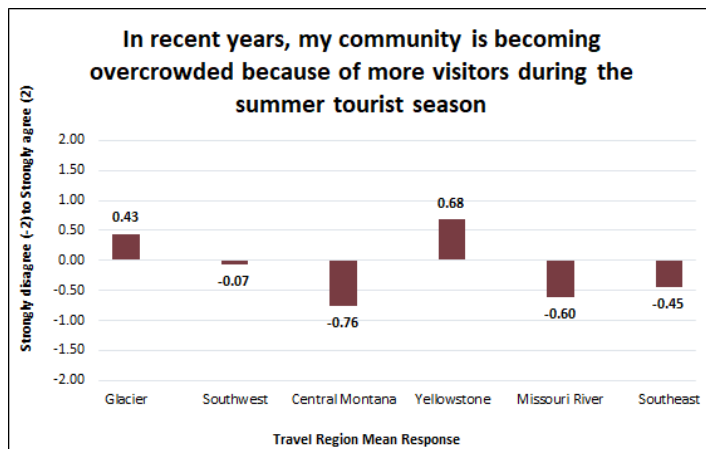
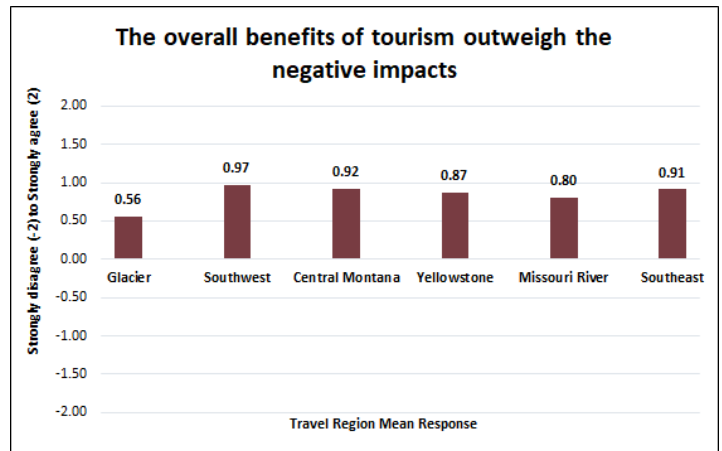
4TH QUARTER REPORT 2020

RESIDENTS' ATTITUDES

A survey of 1,834 Montanans found residents hold an overall positive attitude towards tourism within the state and agree that the overall benefits outweigh the negative impacts.

BECAUSE OF COVID-19

Due to COVID-19, residents were more concerned about visitors in their community. Residents also agreed that they were more likely to travel within Montana than out-of-state at the present time.



MONTANA TRAVEL REGIONS

Residents across the six Montana Travel Regions expressed similar attitudes towards tourism. One area in which residents differed concerned the level of crowding in their community during the summer months due to the number of visitors present. Travel regions like Yellowstone Country and Glacier Country were more in agreement with this statement, while regions like Missouri River Country and Central Montana disagreed.

75%

Residents who agree that the overall benefits of tourism outweigh the negatives

49%

Residents who agree that if tourism increases in Montana, the quality of life for residents will improve

42%

Residents who agree that in recent years, the state is becoming overcrowded because of more tourists

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Introduction

This report is the most recent summary of Montana residents and their attitudes towards tourism in the state. A [previous report](#) on residents' attitudes, published in the Fall of 2020, focused on data collected during the Summer of 2020. Like the data in this report reflect, ITRR typically conducts this survey during the 4th quarter of each year (October, November, December). However, recent changes in the recreation and travel industries brought on by the pandemic prompted interest in residents' attitudes during the summer months. Although residents reported an overall positive attitude towards tourism during the Summer of 2020, ITRR found that for the first time since 1995, more residents agreed (50%) than disagreed (40%) that in recent years the state was becoming overcrowded because of more tourists. In addition, 68% of residents either agreed or strongly agreed that because of COVID-19 they were more concerned about visitors in their community. This report looks at the more recent data and some comparisons.

Purpose

As a state that is economically dependent on the billions of dollars generated from tourism, a positive relationship between out-of-state visitors and the host community is an extremely important part of creating a successful tourism industry. This study was conducted for two reasons: 1) To continue monitoring residents' attitudes towards tourism, consistent with previous years' methods, and 2) to help determine if the recent change in residents' attitudes towards tourism found during the Summer of 2020 was a result of the timing of the survey (both seasonally and during the COVID-19 pandemic) which varied somewhat from trend data captured during the 4th quarter of each year.

The main purpose of this study was to assess Montanans' attitudes towards tourism in the state. More specifically, these questions were gathered to better understand how Montanans perceive their quality of life in relation to tourism, how they perceive crowding in the state and their community, and the degree to which they feel tourism in their community benefits them economically. ITRR has been asking a core set of these questions since 1992. Additionally, residents' attitudes about visitors in Montana and their own willingness to travel within the state during COVID-19 were assessed by asking specific, COVID-19 related questions.

Methods

Data were collected by trained surveyors who asked questions of Montanans as they filled up their vehicle with fuel at gas stations or 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 8th to December 31st, 2020, any Montanan who stopped at gas stations or rest areas had an opportunity to be surveyed about their attitudes toward tourism in Montana. The respondent data were

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weighted by the county of residence and gender from the census, thus providing a representative sample reflecting the geographic population and gender of the state.

Survey design

The survey was designed by ITRR personnel and loaded on iPads for the ten surveyors located around the state. The survey was short by design (due to the amount of time available) with only 11 questions. See appendix A for survey questions.

Limitations

This study was limited to Montana residents 18 and older who either drive or are passengers in vehicles.

Response rate

The response rate was 87%, with 1,834 Montana residents responding to the survey during the last quarter of 2020.

Results

Respondent ages ranged from 18-91 with an average age of 46.17 years. For this study, the gender breakdown was 50.3% male and 49.6% female. The number of respondents by age category is shown in Table 1 and the gender breakdown is shown in Table 2.

Table 1: Percent of Respondents by Age

Q4, 2020		N	%
Average age of respondent = 46.17 years old	18-24	176	10%
	25-34	295	16%
	35-44	389	21%
	45-54	358	20%
	55-64	359	20%
	65-74	199	11%
	75+	46	3%
	Total	1822	100%

Table 2: Percent of Respondents by Gender

Q4, 2020		N	%
Gender	Male	910	50%
	Female	922	50%
	Total	1832	100%

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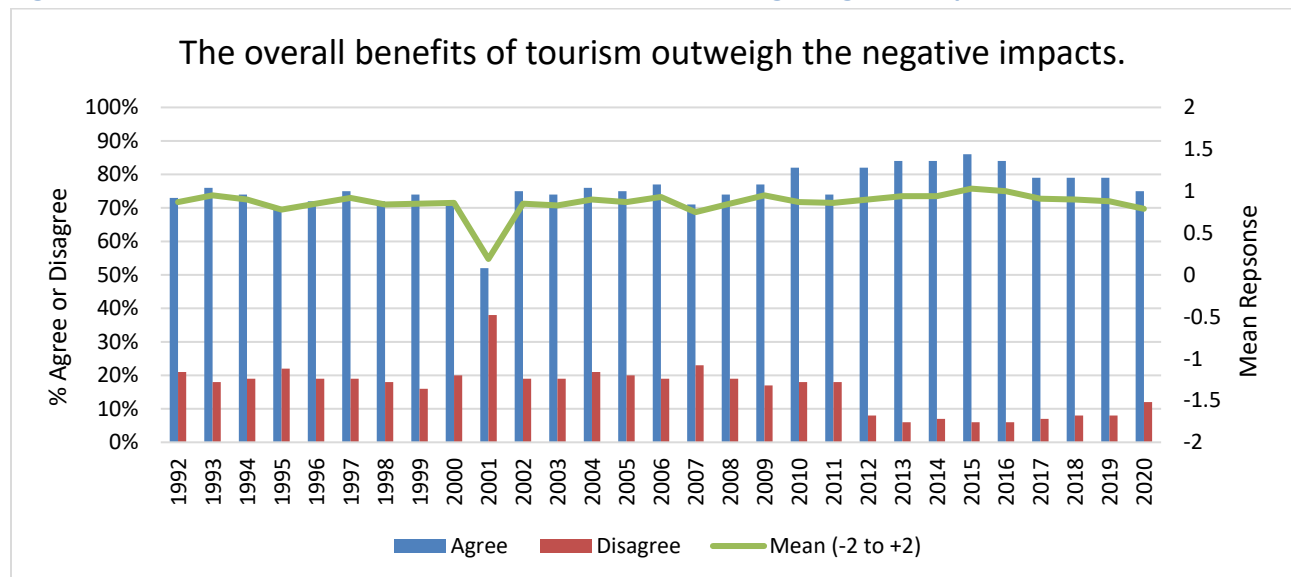
Residents were asked if they felt that the overall benefits of tourism outweighed the negative impacts on a scale from strongly disagree (-2) to strongly agree (+2). The majority of respondents (56%) agreed with the statement. The next highest response was 'Strongly Agree,' with 19% of respondents stating that the benefits from tourism outweigh the negative impacts. Displayed below in Table 3 is a breakdown of responses.

Table 3: Overall Benefits of Tourism Outweigh Negative Impacts

Q4, 2020		N	%
The overall benefits of tourism outweigh the negative impacts.	Strongly Disagree	41	2%
	Disagree	181	10%
	Unsure	241	13%
	Agree	1021	56%
	Strongly Agree	348	19%
	Total	1832	100%
Mean = 0.79			

Residents have been asked this question (as well as the two following questions) each fall since 1992. It is worth noting the trend in residents' responses over nearly 3 decades (Figures 1-3). While there was slightly more disagreement with the statement in 2020 than other recent years, and the lowest mean response since 2007, residents still overwhelmingly agree that the overall benefits of tourism outweigh the negative impacts.

Figure 1: 1992-2020 Trend, Overall Benefits of Tourism Outweigh Negative Impacts



*Responses ranged from -2 (strongly disagree) to 0 (unsure) to +2 (strongly agree). A score of -1 or -2 is interpreted as disagreement, and a score of +1 or +2 is interpreted as agreement.

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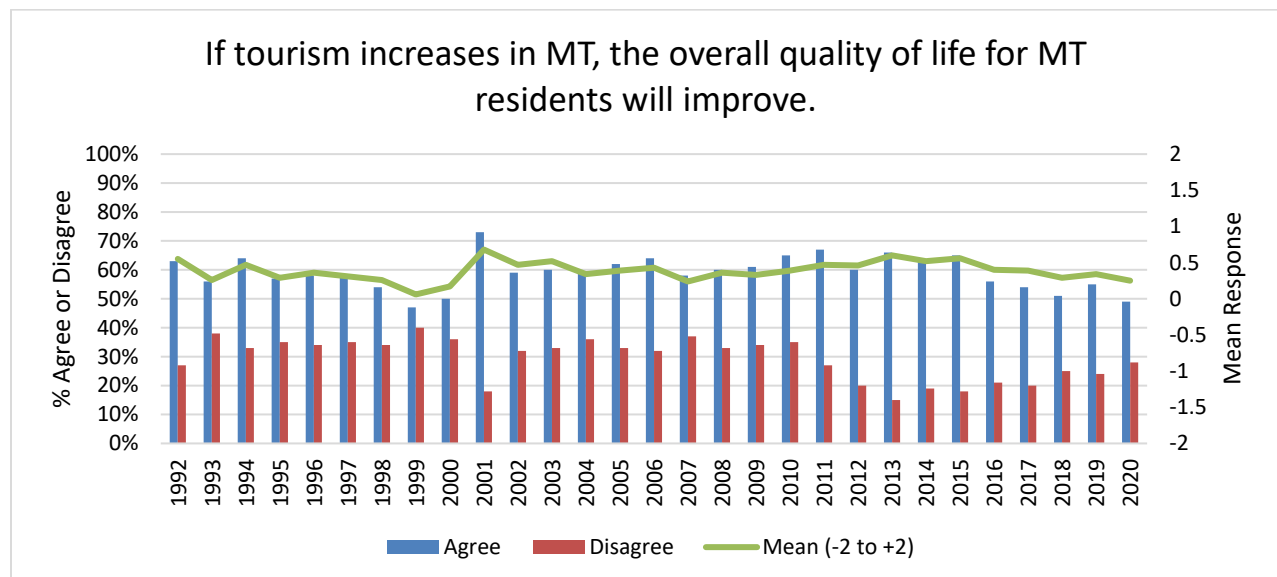
Residents were then asked if they felt that their quality of life and the quality of life for other Montana residents would improve if tourism increases. Table 4 displays Montana residents' responses on a scale from strongly disagree (-2) to strongly agree (+2). Forty-two percent of Montana residents agreed that the quality of life for residents of Montana would improve if tourism increases. The next highest response came from residents who disagreed with the statement (24%), followed closely by 23% who were unsure about it.

Table 4: Quality of Life Improvement with More Tourism

Q4, 2020		N	%
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	Strongly Disagree	74	4%
	Disagree	434	24%
	Unsure	421	23%
	Agree	762	42%
	Strongly Agree	139	8%
	Total	1830	100%
Mean = 0.25			

Again, looking at the long-term trend in responses to this question, residents are feeling slightly less positive about quality of life improving for residents along with tourism increases in the state, but are generally still in agreement with the statement (Fig. 2).

Figure 2: 1992-2020 Trend, Quality of Life Improvement with More Tourism



Residents were then questioned about their opinions on crowding related to tourism. They were first asked if they felt that the *state* was becoming overcrowded because of more tourists in recent years. The next question asked if they felt their *community* was becoming overcrowded with tourists in recent years. The results are listed in Table 5 and Table 6, respectively. Residents generally tended to disagree that the state was becoming overcrowded (41%), or that their community was becoming overcrowded (45%) with tourists. However, some residents did agree (34%) that the state was becoming overcrowded because of more tourists, while 28% of Montana residents felt the same was happening in their community.

Table 5: State Becoming Overcrowded Due to Tourists

Q4, 2020		N	%
In recent years, the <i>state</i> is becoming overcrowded because of more tourists.	Strongly Disagree	65	4%
	Disagree	739	41%
	Unsure	245	13%
	Agree	627	34%
	Strongly Agree	144	8%
	Total	1820	100%
Mean = 0.03			

Regarding respondents' perceptions of state-level crowding, though just slightly above 0.0, this is the first time the mean response to this statement has been positive (0.03) indicating a very slight agreement, overall, that the state is becoming crowded due to tourism. There has been a slow, but steady increase in recent years in the percentage of Montana residents who agree with the statement. As of 2020, 42% of Montana residents agreed with the statement. That is the highest reported number since 1995 (50%).

Figure 3: 1992-2020 Trend, State Becoming Overcrowded Due to Tourists

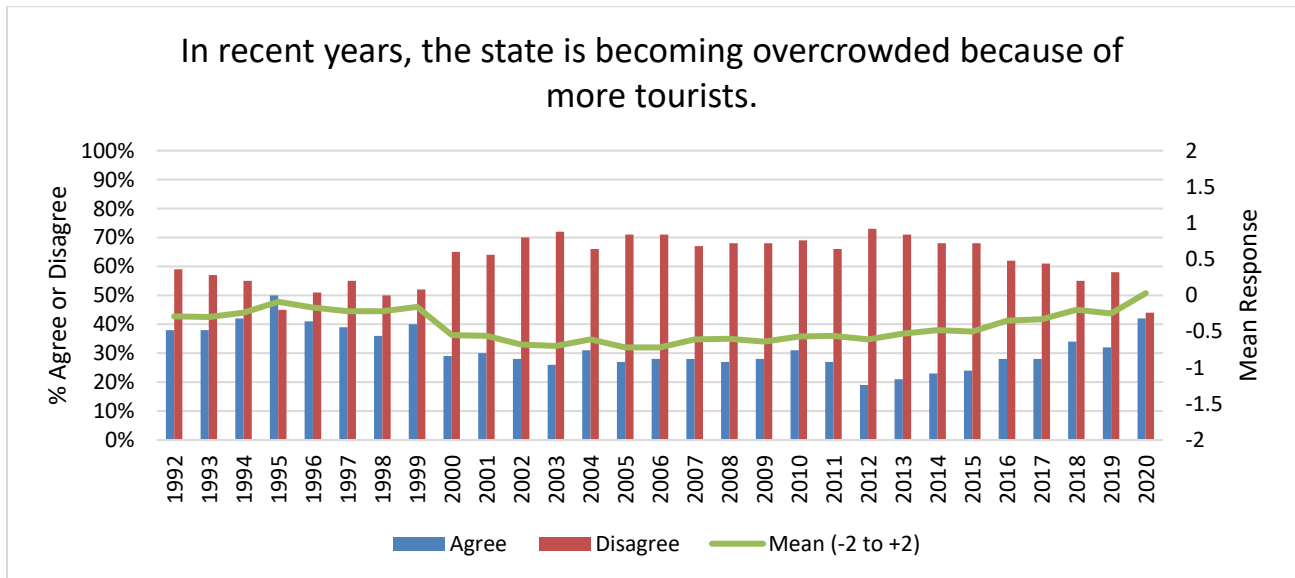


Table 6: Community Becoming Overcrowding in the Summer Seasons Due to Tourists

Q4, 2020		N	%
In recent years, my <i>community</i> is becoming overcrowded because of more visitors during the summer tourist season.	Strongly Disagree	79	4%
	Disagree	819	45%
	Unsure	166	9%
	Agree	511	28%
	Strongly Agree	244	13%
	Total	1819	100%
Mean = 0.01			

Next, residents were asked about the economic benefit of tourism promotion. Table 7 displays residents' responses to this question. The majority of residents (59%) responded that they believed tourism promotion by the state of Montana benefits their community economically. In addition, 25% of respondents said that they strongly agreed with the statement, totaling 84% for those residents who either agreed or strongly agreed with the statement.

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

Q4, 2020		N	%
Tourism promotion by the state of Montana benefits my community economically.	Strongly Disagree	20	1%
	Disagree	149	8%
	Unsure	133	7%
	Agree	1070	59%
	Strongly Agree	448	25%
	Total	1820	100%
Mean = 0.98			

Additional questions in the survey asked residents how long they have lived in their current community, as well as the size of their community. The largest portion of respondents (37%) indicated they have lived in their current community for over 20 years. In addition, the largest percentage of respondents (35%) stated that they live in a community with a population of over 20,000.

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

Q4, 2020		N	%
How long have you lived in your current community?	Less than 1 year	105	6%
	1 to 5 years	330	18%
	6-10 years	368	20%
	11-20 years	348	19%
	More than 20 years	677	37%
	Total	1828	100%

Table 9: Size of Community

Q4, 2020		N	%
Which of the following best describes the place where you live?	Rural area outside of any community borders	341	19%
	Community less than 5,000 population	531	29%
	Community of 5,001 to 10,000 people	251	14%
	Community of 10,001-20,000 people	65	4%
	Community of more than 20,000	643	35%
	Total	1831	100%

Residents were then asked questions specific to the ongoing COVID-19 pandemic. When asked if they were more concerned about visitors in their community because of COVID-19, 61% of residents either agreed or strongly agreed with that statement, while 30% were unconcerned. In addition, 64% of

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residents either agreed or strongly agreed that they were more likely to travel within Montana than out-of-state because of COVID-19. A quarter of residents disagreed to some extent that they would likely keep their travels in-state due to the pandemic. When comparing these figures to the [previous findings from Q3 2020](#), results show that residents surveyed during Q4 were less concerned about visitors in their community (-6%) and were less likely to opt for in-state travel than out-of-state travel (-7%). Tables 10 and Table 11 provide information related to residents' attitudes concerning COVID-19.

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

Q4, 2020		N	%
Because of COVID-19, I am more concerned about visitors in my community.	Strongly Disagree	97	5%
	Disagree	446	25%
	Unsure	174	10%
	Agree	742	41%
	Strongly Agree	360	20%
	Total	1819	100%
Mean = 0.45			

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

Q4, 2020		N	%
Because of COVID-19, I am more likely to travel within Montana than out-of-state.	Strongly Disagree	82	5%
	Disagree	345	20%
	Unsure	191	11%
	Agree	742	42%
	Strongly Agree	393	22%
	Total	1753	100%
Mean = 0.58			

*64 respondents selected N/A, indicating they do not travel/not planning to travel.

To further analyze the data, we compared responses to the five questions about tourism based on length of residency and community size. Figures 4-8 display these attitudes in conjunction with data collected about the length of residency in Montana. These data were collected in intervals of less than 1 year, 1-5 years, 6-10 years, 11-20 years, and more than 20 years.

Figure 4: Overall Benefits of Tourism Outweigh Negative Impacts – By Length of Residency

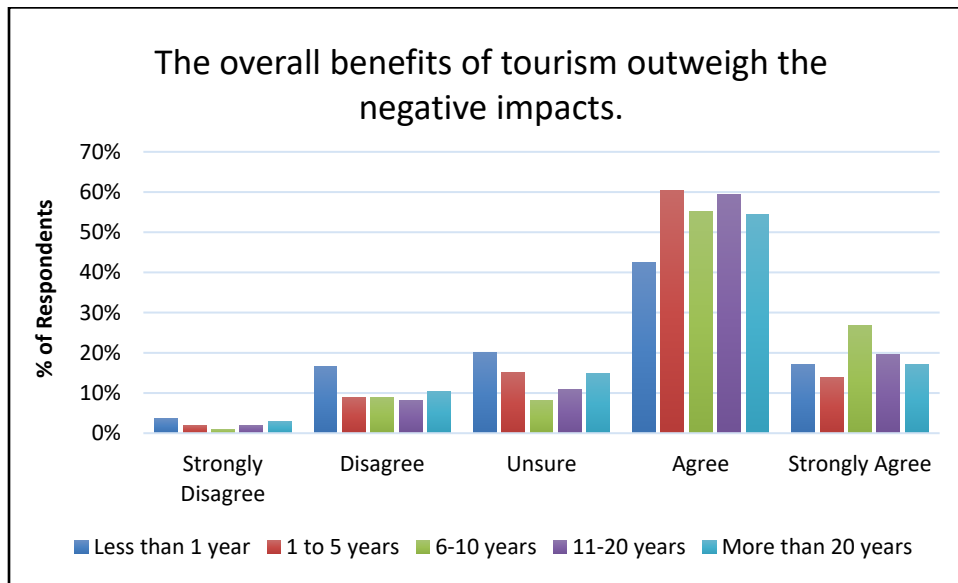
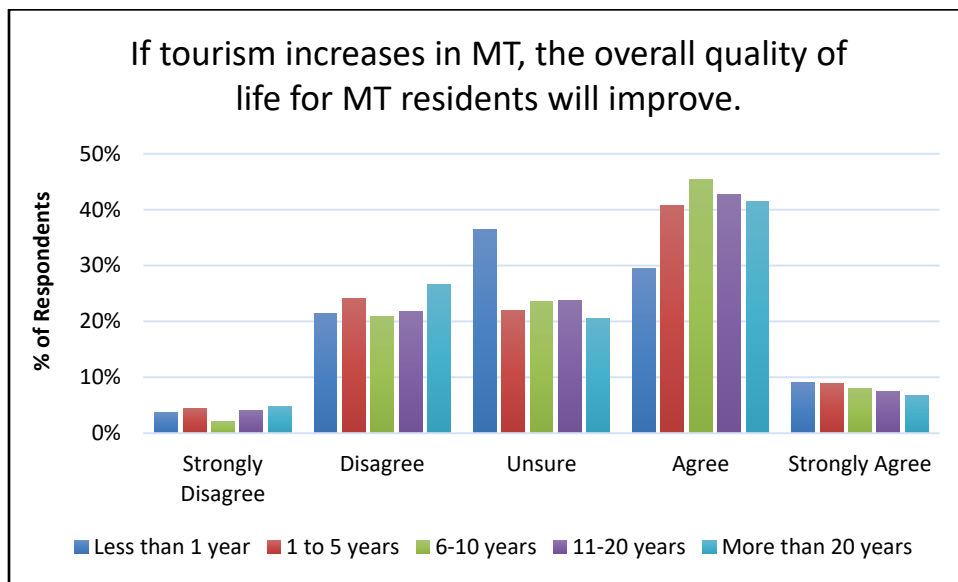


Figure 5: Quality of Life Improvement with More Tourism- By Length of Residency



Figures 6 and 7 display how residents feel about tourism crowding in the state, and specifically “tourism season” crowding in their community, segmented by the length of time they have lived in Montana. Figure 8 shows residents’ attitudes towards how tourism promotion by the State impacts their community again based on length of residency.

Figure 6: Overcrowding in State from Tourists- By Length of Residency

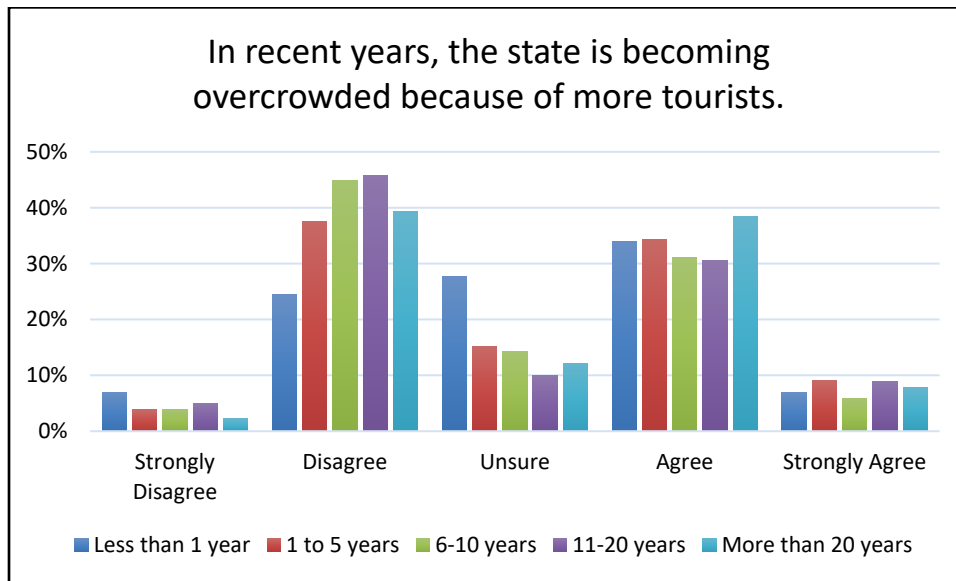


Figure 7: Overcrowding in Community from Visitors during the Summer Tourist Season - By Length of Residency

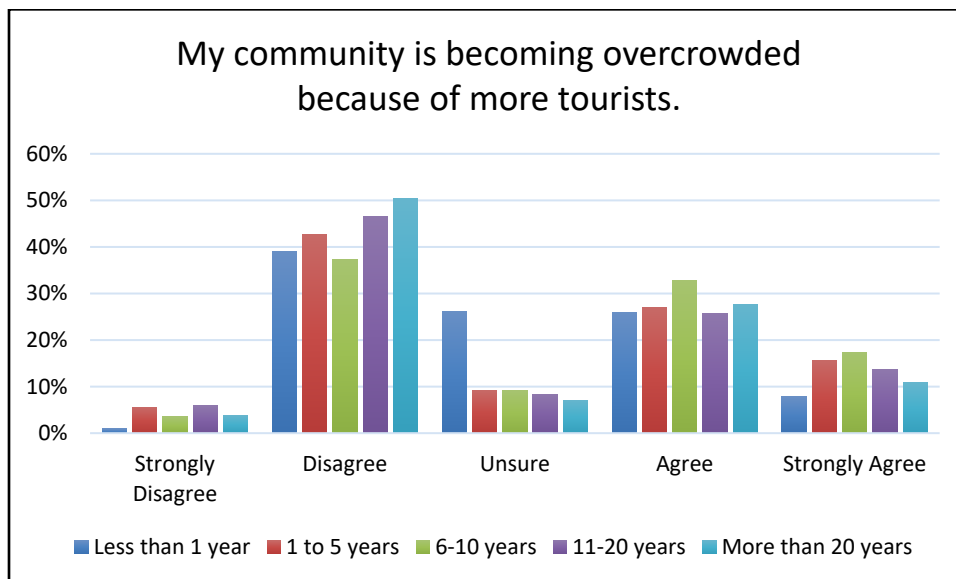
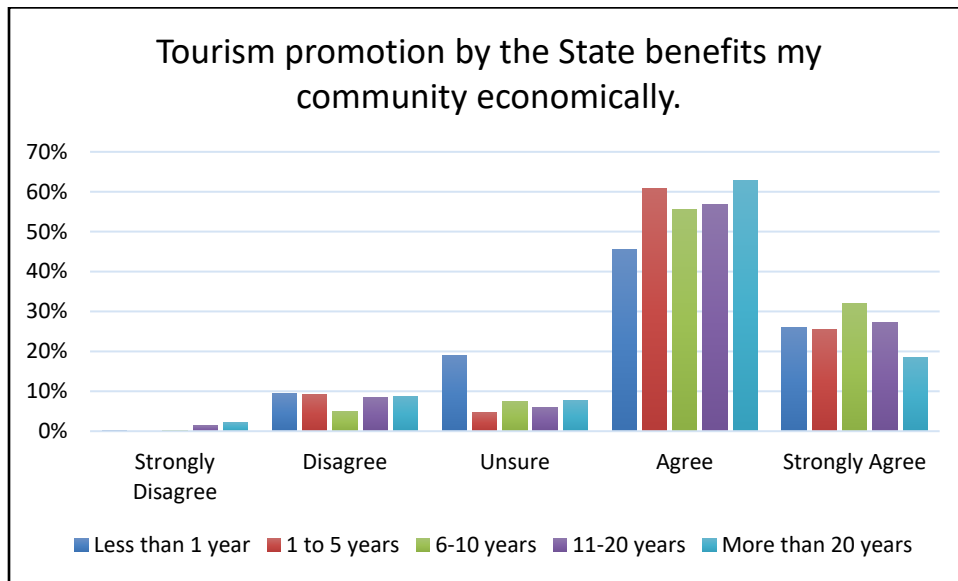


Figure 8: Tourism Promotion by the State Benefits My Community- By Length of Residency



Figures 9-13 compare the five questions asked about tourism with the size of the community the respondent is from. These data were collected by size of community categorized as rural, less than 5,000, 5,000-10,000, 10,001-20,000 or more than 20,000 residents.

Figure 9: Overall Benefits of Tourism Outweigh Negative Impacts- By Community Size

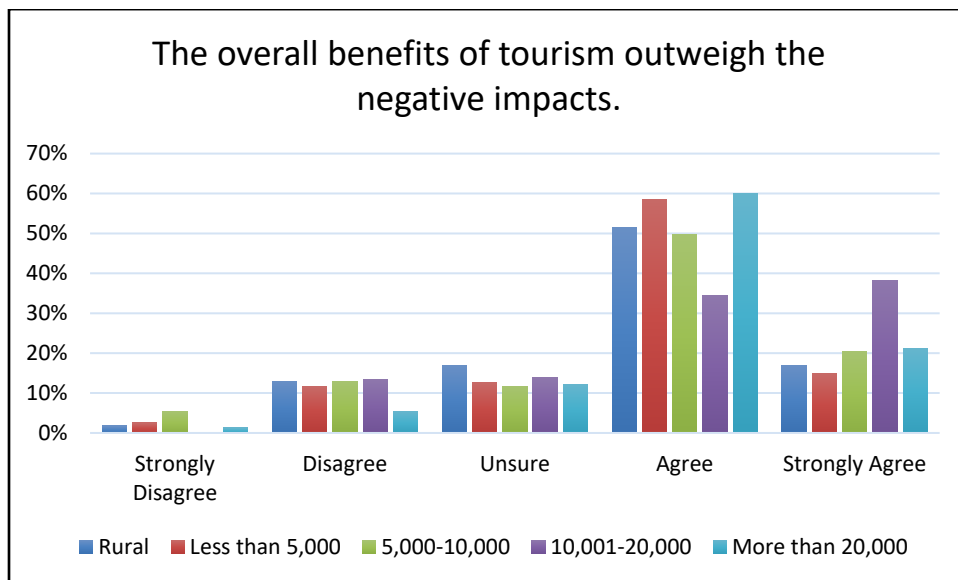


Figure 10: Quality of Life Improvement with More Tourism- By Community Size

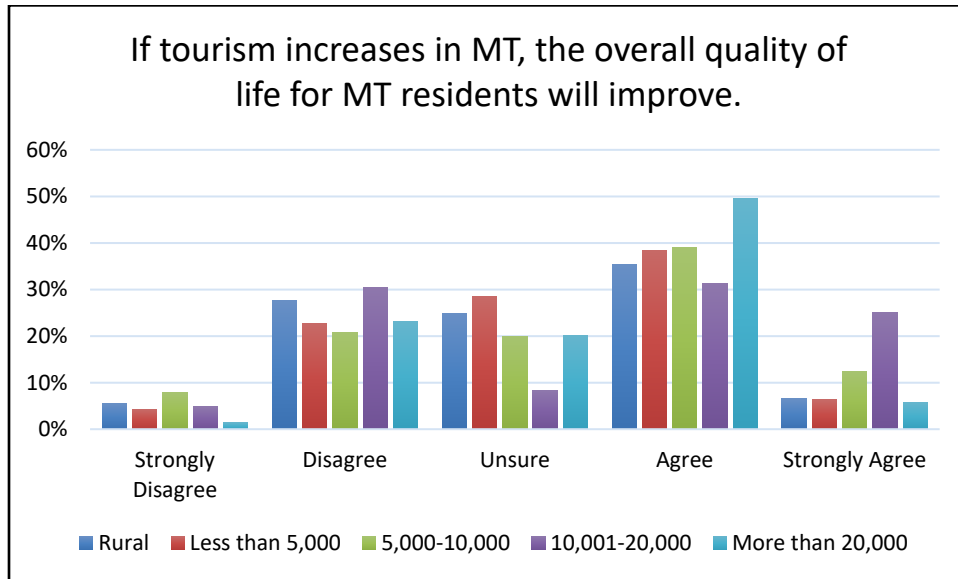


Figure 11: Overcrowding in State from Tourists- By Community Size

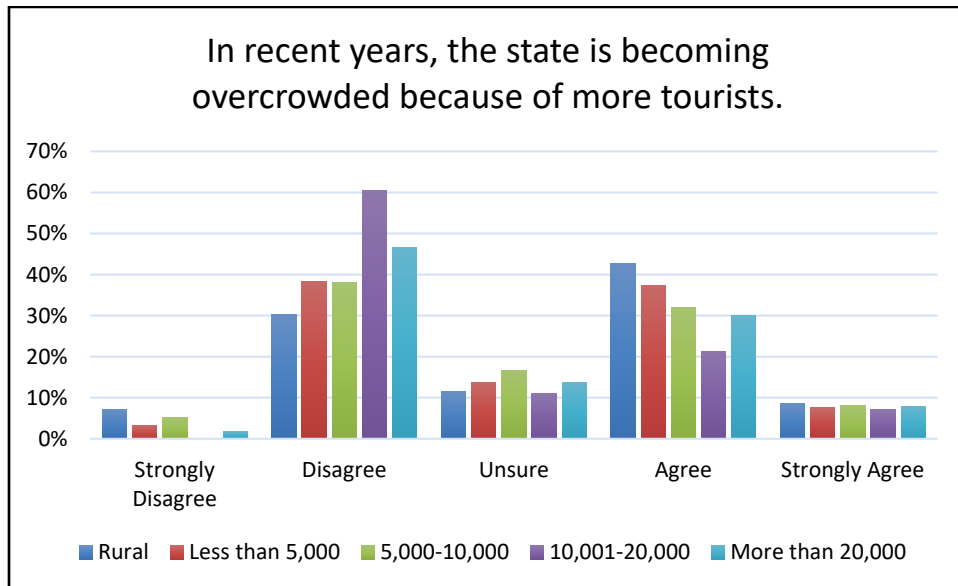


Figure 12: Overcrowding in Community from Visitors during the Summer Tourist Season - By Community Size

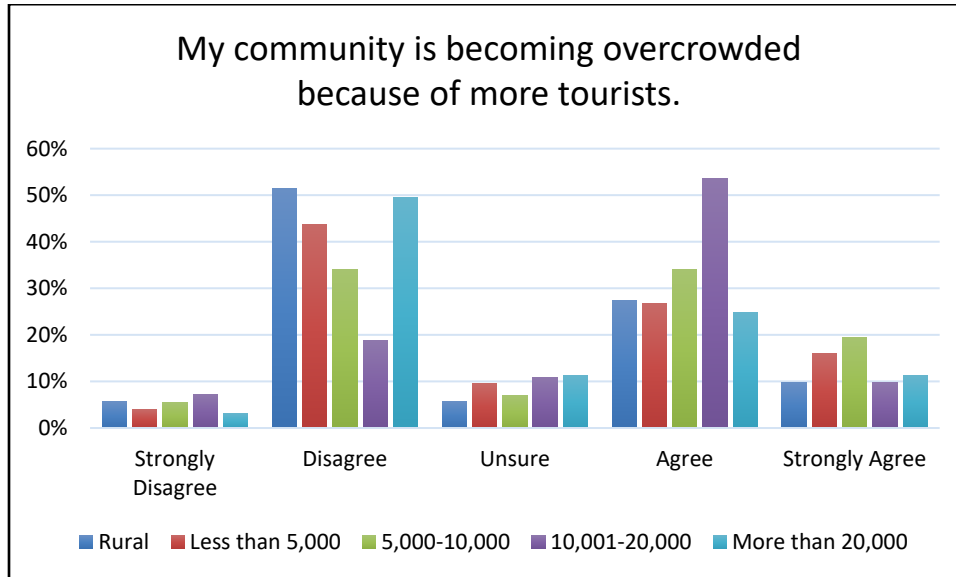
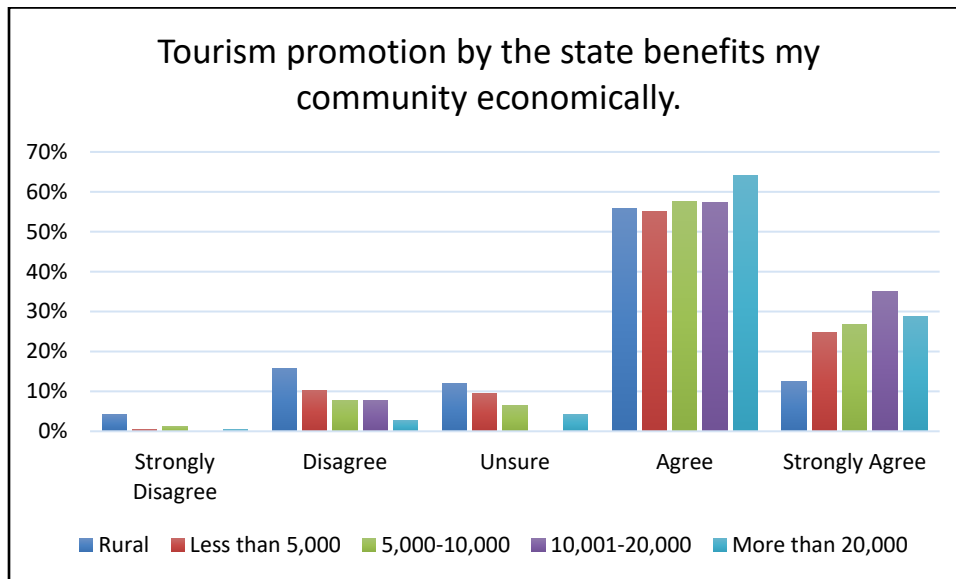


Figure 13: Tourism Promotion by the State Benefits My Community- By Community Size

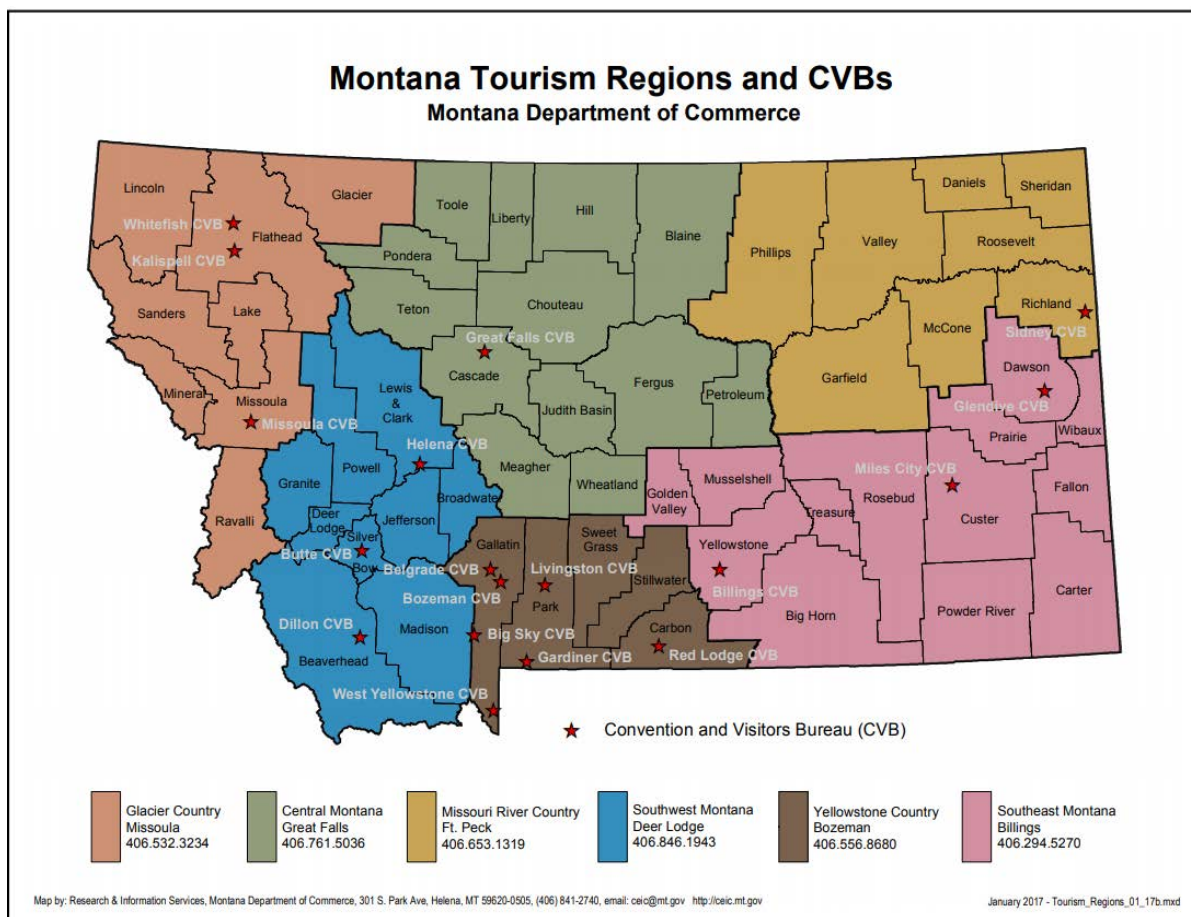


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Furthermore, results from the data were separated and analyzed by the six Montana travel regions: Glacier Country, Southwest Montana, Central Montana, Yellowstone Country, Missouri River Country, and Southeast Montana. Figure 14 displays all counties in Montana with a highlighted overlay displaying their respective travel region within the state. Figures 15-21 display each region's responses with respect to questions concerning residents' attitudes towards tourism. The results are presented in the same order as resident attitude questions above. Mean responses are presented in the travel region discussion, with negative values indicating disagreement with the statement and positive values indicating agreement (-2, strongly disagree to +2, strongly agree).

Figure 14: Montana Travel Regions



Of the seven questions posed to residents that were related to tourism, only two questions produced noticeable differences between the travel regions with respect to their level of agreement: In recent years, my community is becoming overcrowded in the summer season due to more tourists, and tourism promotion by the state benefits my community economically. Outside of those two questions, residents across the state were in close agreement with one another regarding their attitudes toward tourism.

Figure 15: Overall Benefits of Tourism Outweigh Negative Impacts - By Travel Region

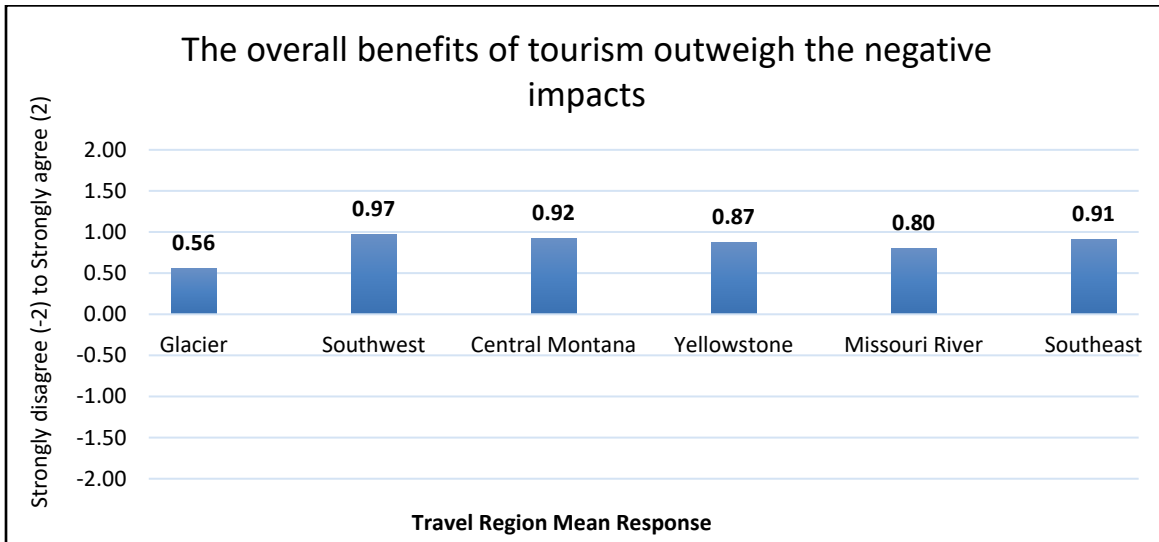


Figure 16: Quality of Life Improvement with More Tourism - By Travel Region

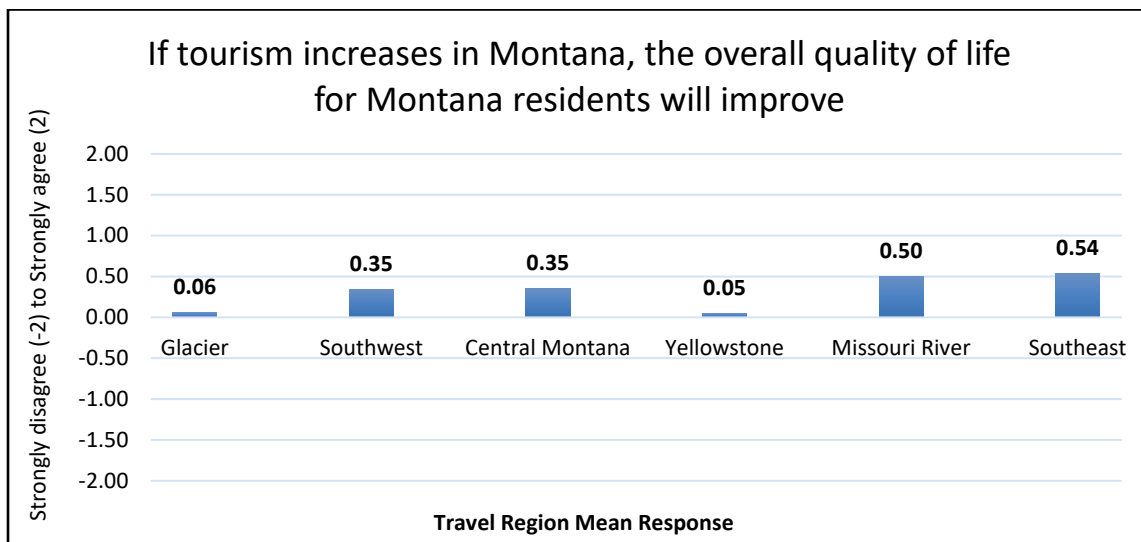
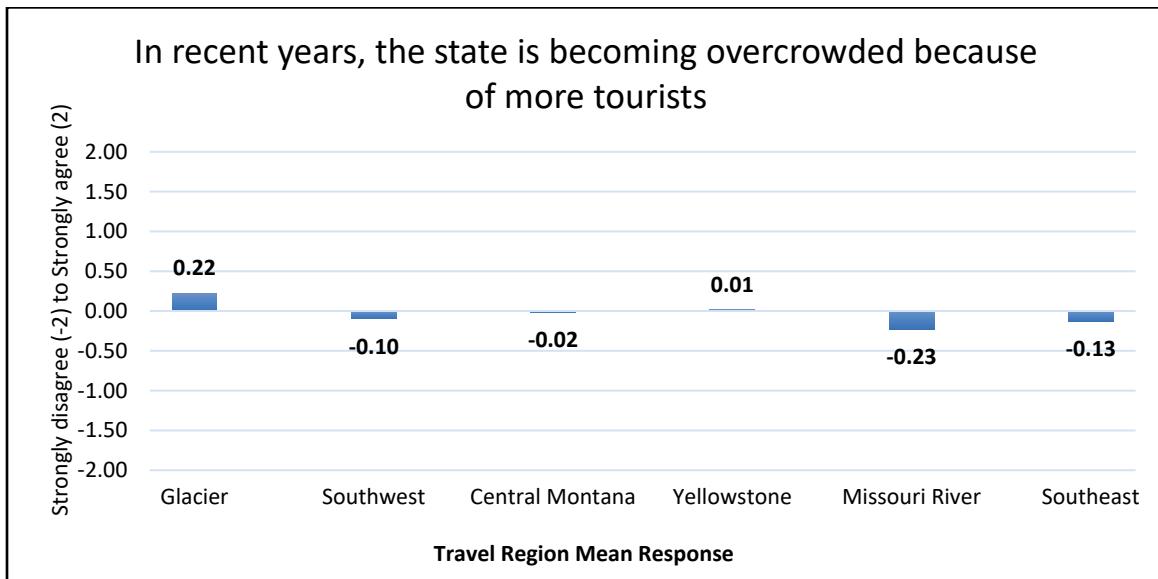
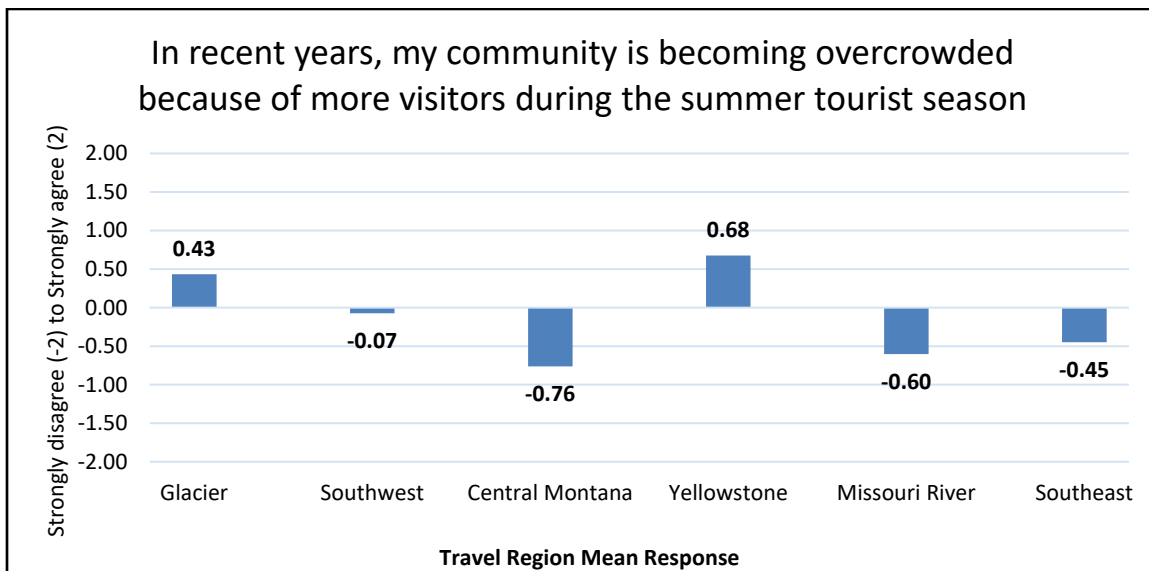


Figure 17: Overcrowding in State from Tourists - By Travel Region



Regarding the question of overcrowding during the summer season in local communities, two travel regions had a mean greater than zero indicating there is slight agreement or some uncertainty toward the statement: Yellowstone Country ($\bar{x} = 0.68$) and Glacier Country ($\bar{x} = 0.43$). Southwest Montana, with a mean of -0.07, shows just slight disagreement with the statement. Southeast Montana, Missouri River Country, and Central Montana also reported mean values below zero, indicating that they do not feel their communities are becoming overcrowded during Montana’s typically busy summer tourism season.

Figure 18: Overcrowding in Community from Tourists - By Travel Region



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When assessing the economic benefit of tourism promotion by the state to their community, all six travel regions reported a positive mean (between 0 and +2) representing some consensus to the statement. The travel region that was most in agreement with the statement was Yellowstone Country, reporting a mean of 1.18, followed by Southwest Montana (1.10) following closely behind. Missouri River Country, still in slight agreement with the statement, produced the lowest mean with 0.34, highlighting some discrepancy between travel regions.

Figure 19: Tourism Promotion by the State Benefits my Community - By Travel Region

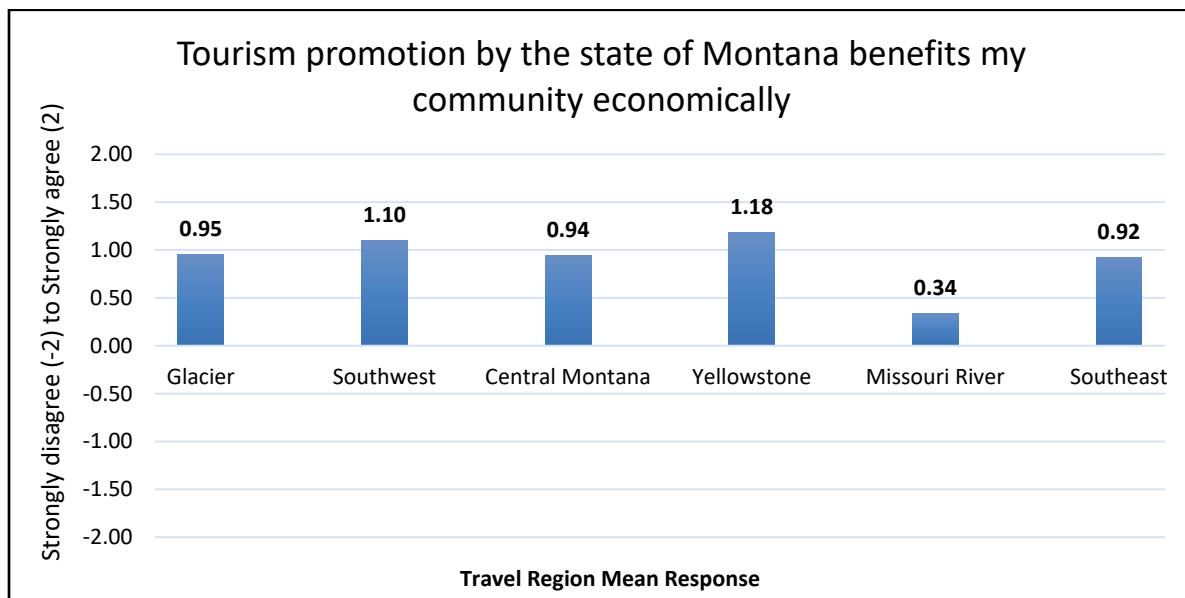


Figure 20: Concern About Visitors in Community Due to COVID-19

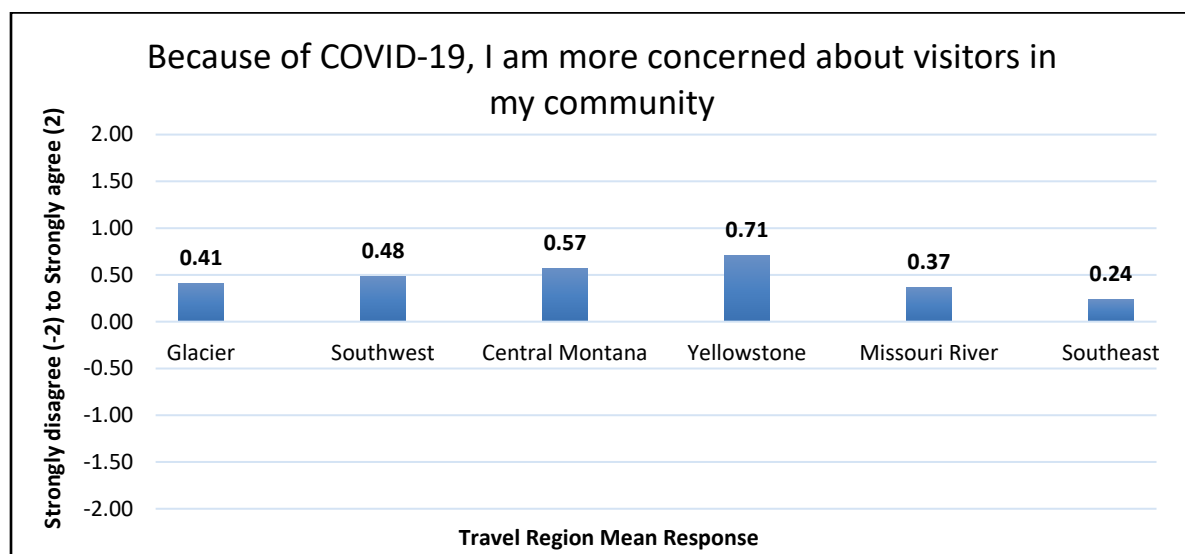
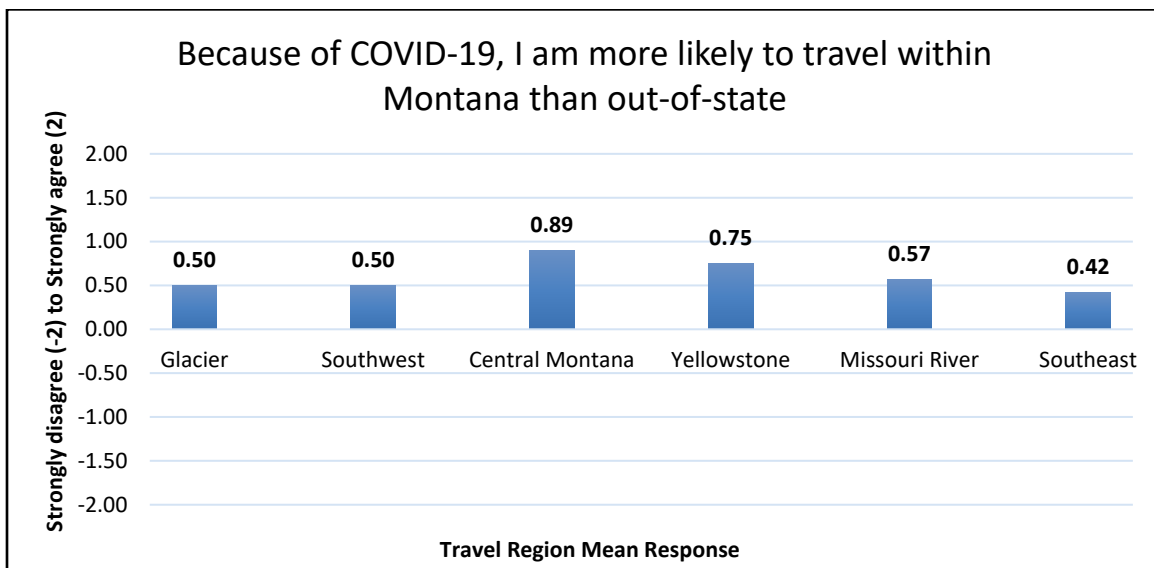


Figure 21: Likelihood of Traveling Within Montana Rather Than Out-of-State



Conclusions

As we enter 2021 and year two of the COVID-19 pandemic, we are presented with an opportunity to reflect back on the year that was. From business and school closures, to phased reopening, and now vaccine distribution, the past year has brought on immense hardships and challenges for many Montanans. However, one continued bright spot has been the general positive attitude residents hold towards tourism within the state. During a time where welcoming visitors to Montana is both an economic necessity and increased personal safety risk, residents appear to have a somewhat positive attitude regarding the way the state has managed this balancing act.

A majority of Montana residents (75%) either agreed or strongly agreed that the overall benefits of tourism outweigh the negative impacts. In addition, although some were unsure (23%), nearly half (49%) of Montanans either agreed or strongly agreed that if tourism were to increase in Montana the overall quality of life for Montana residents would improve. Furthermore, a majority of Montanans (83%) also agreed or strongly agreed that tourism promotion by the state benefits their community economically.

When segmented by travel region, residents again showed overall positive attitudes towards tourism within the state. All travel regions agreed that the overall benefits of tourism outweigh the negative impacts. Some travel regions, like Yellowstone Country and Glacier Country, agreed regarding the economic benefit they receive due to the promotion of tourism while also agreeing that in recent years their communities are becoming overcrowded because of more tourists. In a year that saw strong visitation to Montana's public lands and national parks (even with the closure of Glacier National Park's eastside), it comes as little surprise that the travel regions responsible for bearing the brunt of this visitation are the ones more likely to report overcrowding in their community. There was also agreement from the travel regions that residents across the state were concerned about visitors in their

community because of COVID-19, while agreeing that they were more likely to travel within Montana than out-of-state as a result of the pandemic.

In the Fall of 2020, ITRR published two reports; one [concerning residents' attitudes towards tourism during the summer months](#), and another focused on [residents' perceptions of visitors behavior](#) during the summer of 2020 compared to years past. Both reports produced similar findings in that residents' attitudes towards tourism and visitors' behavior were both positive but lower for the Summer of 2020 than had been observed in previous years. Findings from those reports appear to echo similar findings in this report in that residents' attitudes towards tourism are generally positive, but lower than what has been observed in previous years. Results indicate that residents agree and are aware of the economic contributions the tourism industry makes to the state but are increasingly becoming more neutral and/or in agreement that the state is becoming overcrowded because of more tourists.

Appendix A: Survey Questions

Questions asked Q4 2020

1. What Montana county do you live in?

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

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