



TOURISM SURVEY KEY TAKEAWAYS

EXPLORE LIVINGSTON COALITION
AUGUST 2022

EXECUTIVE SUMMARY

- 245 people started the survey, 88% are from Livingston
- 1/3 of the respondents are involved in the hospitality/tourism industry
- Majority agree that the overall benefits of tourism outweigh the negative impacts
- They also agree that area is becoming overcrowded due to summer visitors
- They appreciate the economic and quality of life benefits of tourism
- They are also concerned about impacts to traffic, affordable housing and more
- Respondents want visitors to be respectful; grateful; responsible and smart; low impact; and supportive
- They have a high level of interest in a sustainable tourism strategic management initiative and are willing to get involved

KEY TAKEAWAYS: THOUGHTS ABOUT TOURISM

- Majority of respondents agree that:
 - Overall benefits of tourism outweigh the negative impacts
 - The area is becoming overcrowded because of more tourists
 - The area is becoming overcrowded because of more summer visitors
- Respondents were nearly evenly split as to whether or not the area's overall quality of life will improve if tourism increases
- Attitudes about tourism differ from those from Yellowstone Country who completed ITRR's study; Livingston area respondents were:
 - Less likely to agree that the overall benefits of tourism outweigh the negative impacts
 - More likely to agree that the area is becoming overcrowded because of more tourists

KEY TAKEAWAYS: BENEFITS AND CONCERNS

- Top tourism benefits:
 - Supports downtown and small businesses
 - Jobs, economic drivers
 - Increase restaurants and bar options
 - Supports arts, music, culture, events, etc.
- Top tourism concerns:
 - Traffic congestion
 - Affordable housing
 - Short-term rentals
 - Lack of understanding about recreating responsible
 - Environmental impacts (water, habitat, pollution, waster, etc.)
 - Impact on outdoor recreational opportunities
 - Traffic safety

KEY THEMES: WHAT THEY WANT TO SAY TO TOURISTS

- Several key themes emerged from the open-ended responses to the question: *What would you like to communicate to those visiting the Livingston area?*
- Respondents want visitors to be:
 - **Respectful (101):** “Treat the place with the respect equal to the awe that brought you here.” “Be patient. Be kind, Be a good neighbor.”
 - **Grateful (58):** “Don't be in a hurry. Enjoy what we have to offer.”
 - **Responsible and Smart (41):** “Just don't be an idiot and you'll be most welcome here.” “Recreate responsibly.”
 - **Low Impact (26):** “Love our little town and leave it better than you found it.”
 - **Supportive (22):** “Buy from and support locally owned businesses.” “Protect what you come to see.”
 - **Want Visitors not New Residents (14):** “Visit but don't stay.”

KEY TAKEAWAYS: INTEREST IN SUSTAINABILITY

- 150 people (64%) are interested in seeing sustainable tourism management initiatives used to help plan and manage for continued visitation
 - 61 people (26%) said “maybe”
- 171 people (82%) are interested in being involved in some capacity
- 36 people (51%) said their business would be willing to share information with tourists and visitors

KEY TAKEAWAYS: OTHER THOUGHTS

- Several topics emerged from the open-ended responses to the question: *Anything else you'd like to share related to tourism in Livingston?*
 - Appreciation for efforts (25)
 - Concerns about affordable housing and short-term rentals (10)
 - Want to see tourism income used to relieve community impacts (7)
 - Need for the right kind of/respectful visitors (5)
 - Need for diversified economy (3)



RESPONDENTS

METHODOLOGY AND DEMOGRAPHICS

- The survey was fielded from May 17, 2022 through June 5, 2022
 - The June 2022 Yellowstone River Flood started on June 12, 2022
- The survey was distributed via email to Livingston area tourism and related businesses and posted to Livingston area social channels
- 245 people started the survey
- A majority of the respondents are between 45 to 64 years old (54%)
 - 27% are 25-44 years old
 - 14% are 65-74 years old
- 88% are from Livingston
- 85% have lived in the area at least 6 years
 - 46% have lived here more than 20 years

PARTICIPATION FROM TOURISM-RELATED BUSINESSES

- 32% of the respondents are part of a business/organization related to the hospitality and/or tourism industry
 - 78% are located in Livingston
 - 10% in Emigrant
 - 9% in Pine Creek
 - 7% in Pray
 - 6% in Gardiner
 - 3% in Clyde Park
 - 1% in Wilsall
- 42% of those businesses/organizations have been in operation 20+ years
- 20% have been in operation between 1-5 years
- 49% have been part of their business/organization less than 6 years
- 46% are the owners of the business/organization



ATTITUDES ABOUT TOURISM

LIVINGSTON AREA ATTITUDES ABOUT TOURISM

- **62% agree or strongly agree** that the **overall benefits of tourism** in Livingston and the surrounding area **outweigh the negative impacts**
- **49% disagree or strongly disagree** that **if tourism increases** in Livingston and the surrounding area then the **overall quality of life** for Livingston and the surrounding area residents **will improve**
- **61% agree or strongly agree** that in recent years Livingston and the surrounding area are **becoming overcrowded because of more tourists**
- **65% agree or strongly agree** that in recent years Livingston and the surrounding area are **becoming overcrowded because of more visitors during the summer season**

COMPARISON TO YELLOWSTONE COUNTRY ATTITUDES

	Livingston Area (N = 244) Source: ELC data (May 2022)	Yellowstone Country (N = 163) Source: ITRR data (Q4 2021)
Overall benefits of tourism outweigh the negative impacts	62% strongly agree/agree 26% strongly disagree/disagree	78% strongly agree/agree 17% strongly disagree/disagree
If tourism increases, then the overall quality of life for residents will improve	29% strongly agree/agree 49% strongly disagree/disagree	33% strongly agree/agree 39% strongly disagree/disagree
In recent years, Livingston area/ the state is becoming overcrowded because of more tourists	61% strongly agree/agree 23% strongly disagree/disagree	47% strongly agree/agree 40% strongly disagree/disagree
In recent years, Livingston area/ my community is becoming overcrowded because of more visitors during the summer season	65% strongly agree/agree 18% strongly disagree/disagree	85% strongly agree/agree 8% strongly disagree/disagree



BENEFITS AND CONCERNS

BENEFITS OF TOURISM IN THE LIVINGSTON AREA

- 86% - Supports downtown and small businesses
- 65% - Jobs, economic drivers
- 58% - Increase restaurants and bar options
- 57% - Supports arts, music, culture, events, etc.
- 27% - More lodging choices
- 20% - Expands outdoor recreational opportunities

CONCERNS RELATED TO TOURISM

- 76% - Traffic congestion
- 76% - Affordable housing
- 70% - Short-term rentals
- 66% - Lack of understanding about recreating responsibly
- 65% - Environmental impacts (water, habitat, pollution, waste, etc.)
- 61% - Impact on outdoor recreational opportunities
- 59% - Traffic safety
- 57% - Wildlife conflicts
- 54% - Overcrowding
- 46% - Infrastructure
- 44% - Low wages/lack of good paying jobs/seasonality
- 36% - Growth



INTEREST IN SUSTAINABLE TOURISM

INTEREST IN SUSTAINABLE TOURISM

Survey respondents were given the following information about sustainable tourism initiatives:

Other Montana tourism communities, including Whitefish, Glacier Country, and Big Sky, have created sustainable tourism management initiatives to help plan and manage for continued visitation that will continue to benefit the community.

Would you be interested in seeing something similar developed in the Livingston area with community input?

- 150 people (64%) said “yes”
- 61 people (26%) noted “maybe”
- 25 people (11%) said “no”

INTEREST IN GETTING INVOLVED

The survey noted the following information about getting involved:

Explore Livingston - the Livingston Convention Visitors Bureau/Destination Management Organization (CVB/DMO) - wants to create a sustainable economic development and regional resource stewardship strategy, similar to what other Montana tourism communities have done.

We are looking to obtain diverse participation and input into this strategy. There will be several opportunities to be involved, and nothing will start until late fall.

- 63 people (30%) said they would be interested in being involved in some capacity
- 23 people (11%) said they would be interested in being part of a steering committee
- 85 people (41%) said they would be interested in sharing their thoughts during community input sessions; an additional 85 (41%) said “maybe”

INTEREST IN SHARING INFORMATION

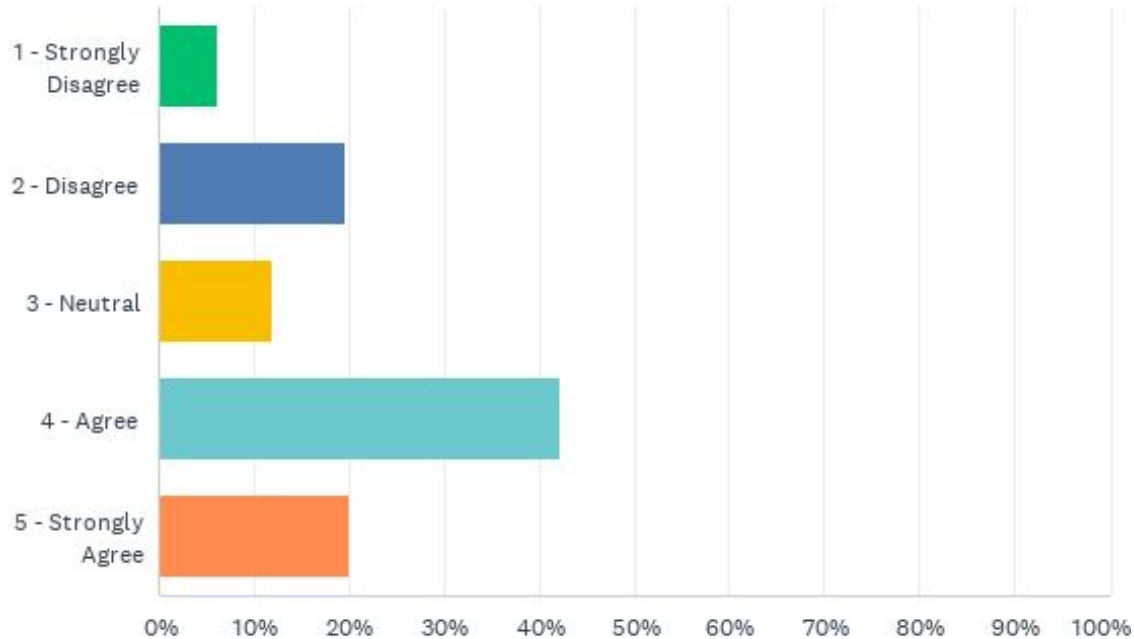
- 36 people (51%) said their business or organization would be willing to share information with tourists and visitors about how they can be good guests during their time here - i.e., handing out free bumper stickers, flyers, etc.
 - 25 people (35%) noted “maybe”



CLOSE-ENDED SURVEY RESULTS

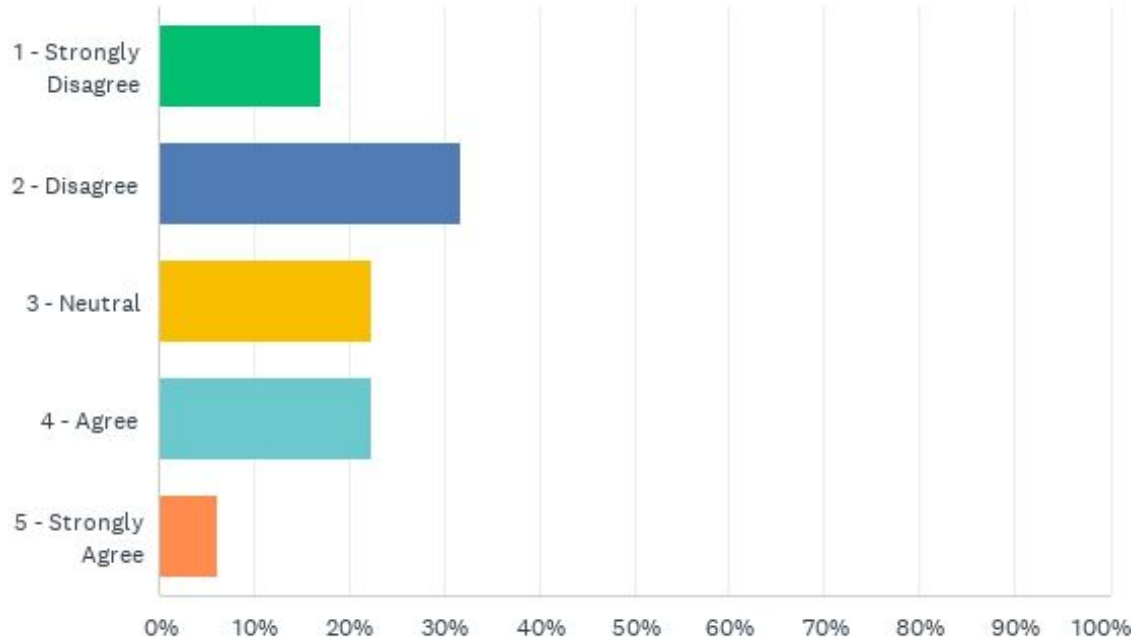
Q1: The overall benefits of tourism in Livingston and the surrounding area outweigh the negative impacts.

Answered: 244 Skipped: 1



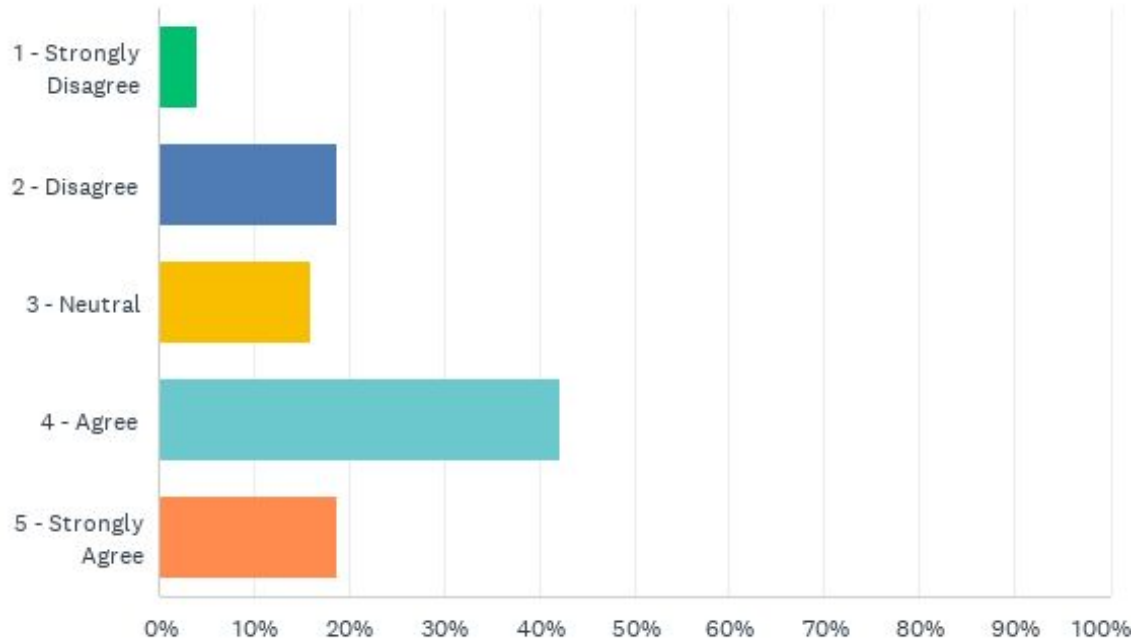
Q2: If tourism increases in Livingston and the surrounding area, the overall quality of life for Livingston and the surrounding area residents will improve.

Answered: 245 Skipped:



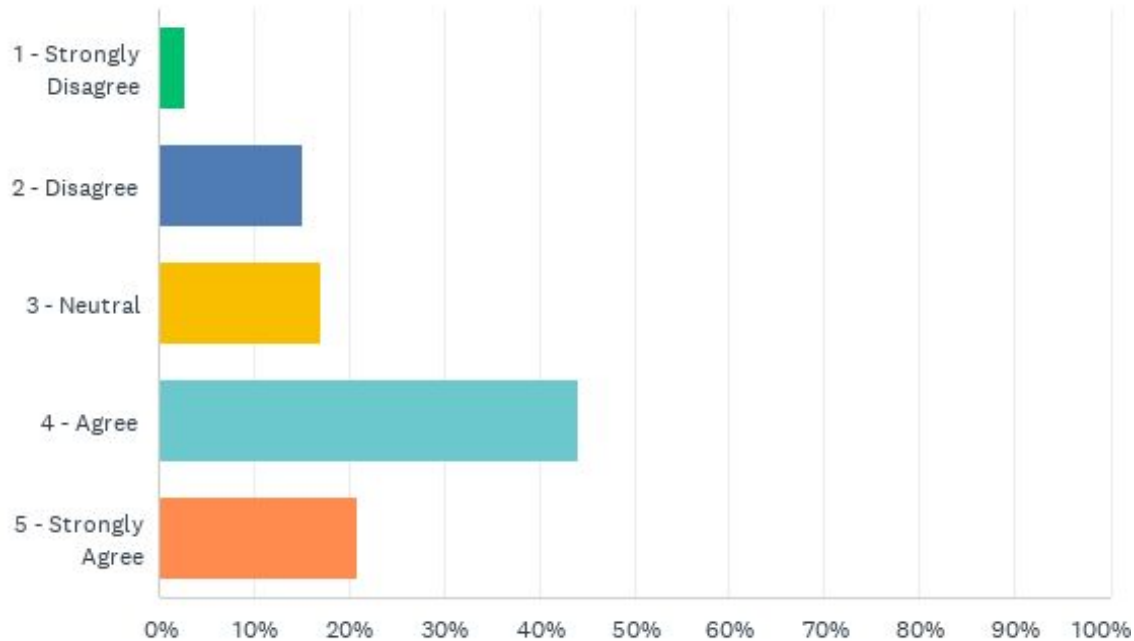
Q3: In recent years, Livingston and the surrounding area are becoming overcrowded because of more tourists.

Answered: 244 Skipped: 1



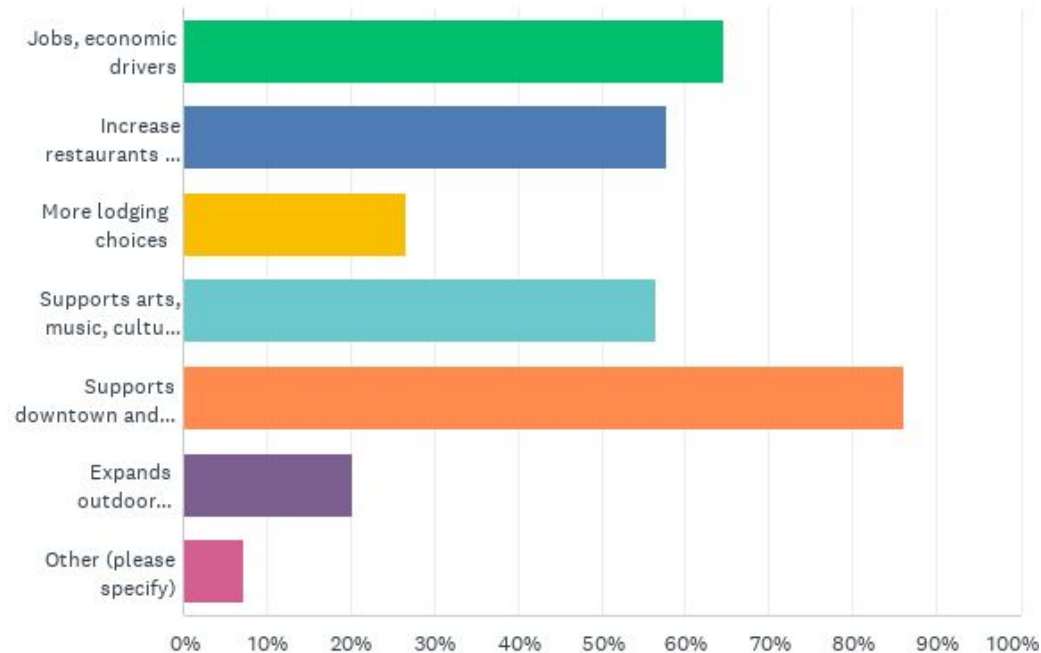
Q4: In recent years, Livingston and the surrounding area are becoming overcrowded because of more visitors during the summer season.

Answered: 245 Skipped: 0



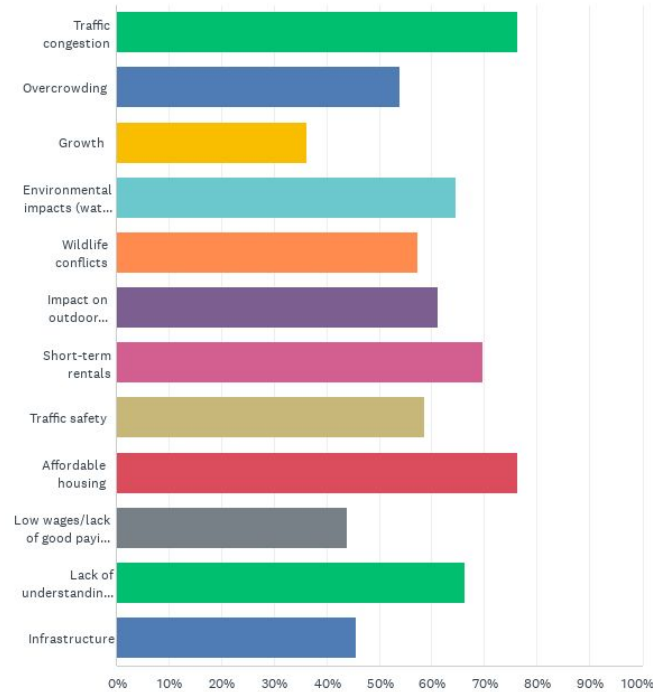
Q5: Which of the following do you consider to be a benefit of tourism in the Livingston area? Select all that apply.

Answered: 237 Skipped: 8



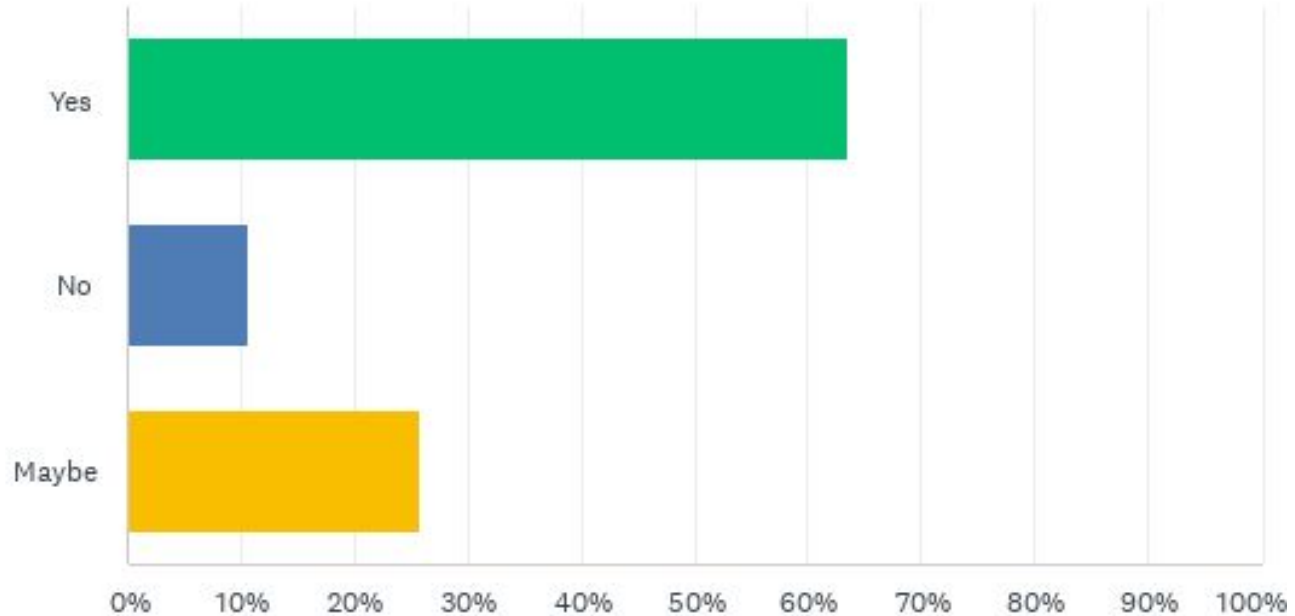
Q6: Which of the following do you consider to be a concern related to tourism in the Livingston area? Select all that apply.

Answered: 237 Skipped: 8



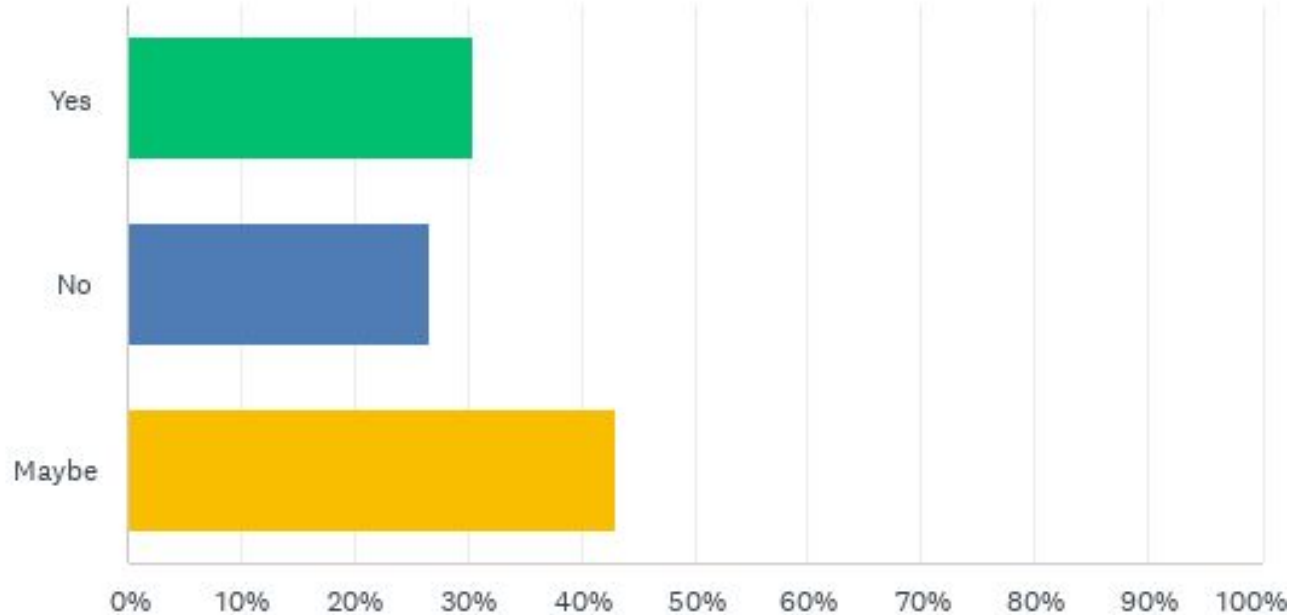
Q8: Would you be interested in seeing something similar developed in the Livingston area with community input?

Answered: 236 Skipped: 9



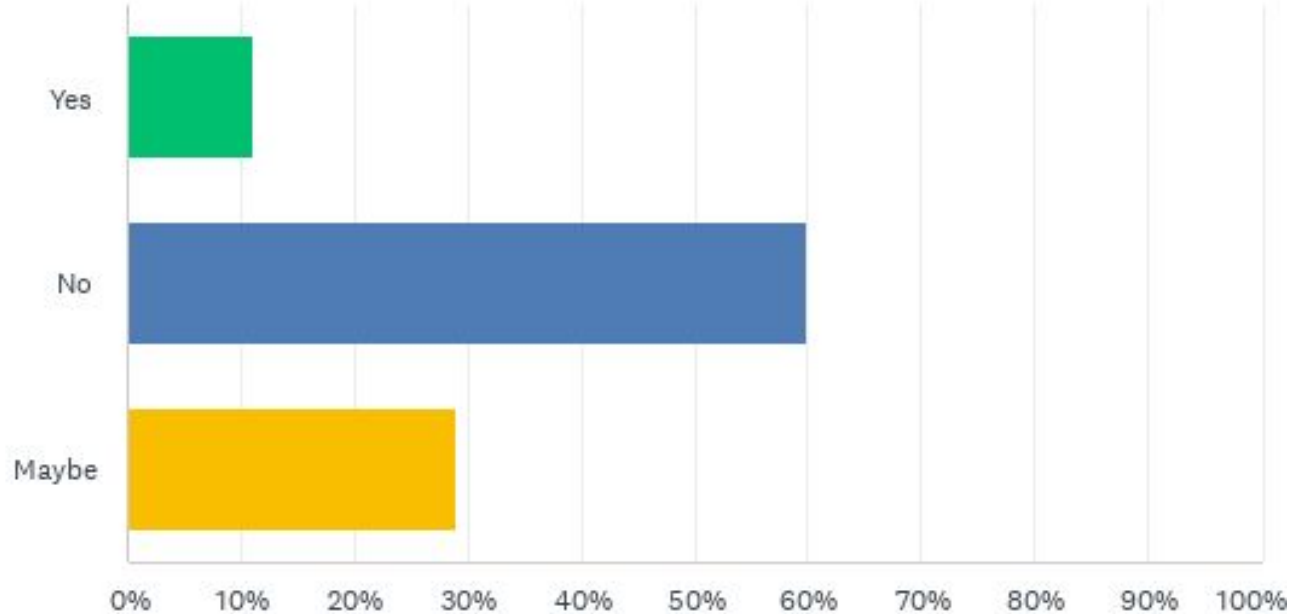
Q9: Would you be interested in being involved in some capacity?

Answered: 207 Skipped: 38



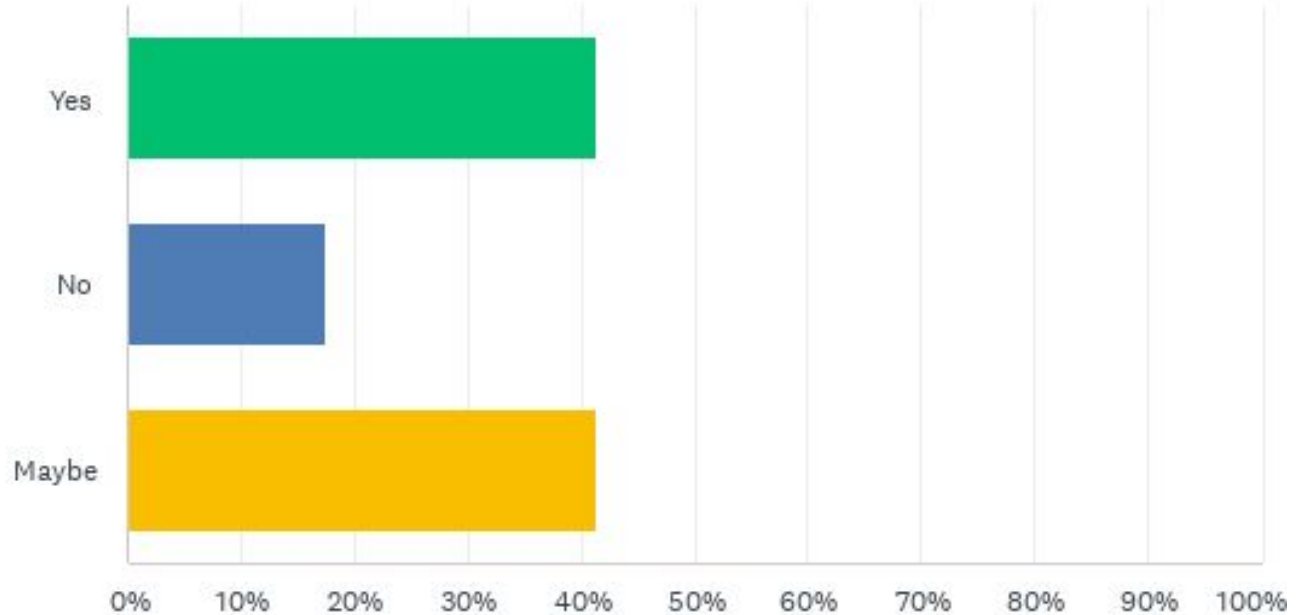
Q10: Would you be interested in being part of the steering committee?

Answered: 207 Skipped: 38



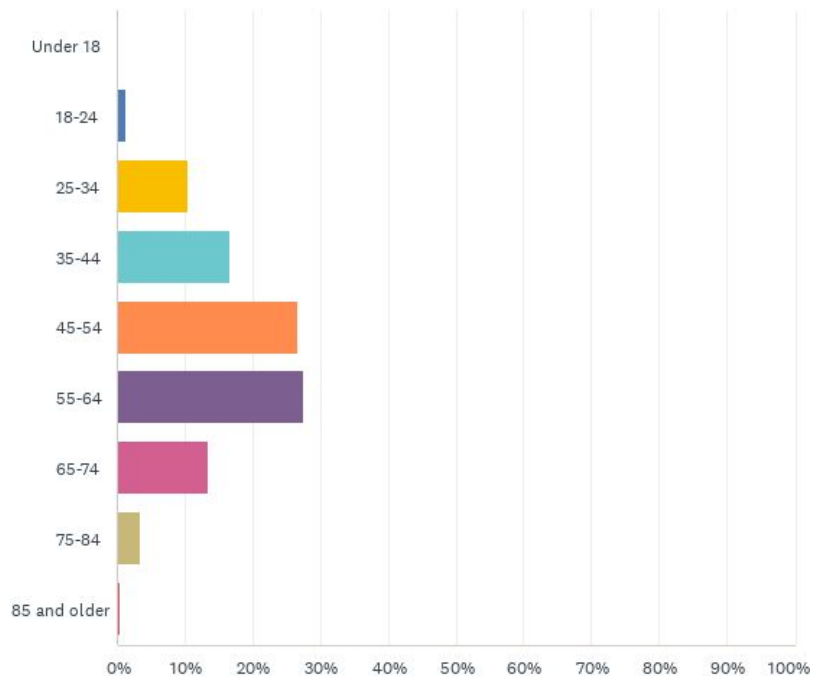
Q11: Would you be interested in sharing your thoughts during community sessions as we gather input?

Answered: 206 Skipped: 39



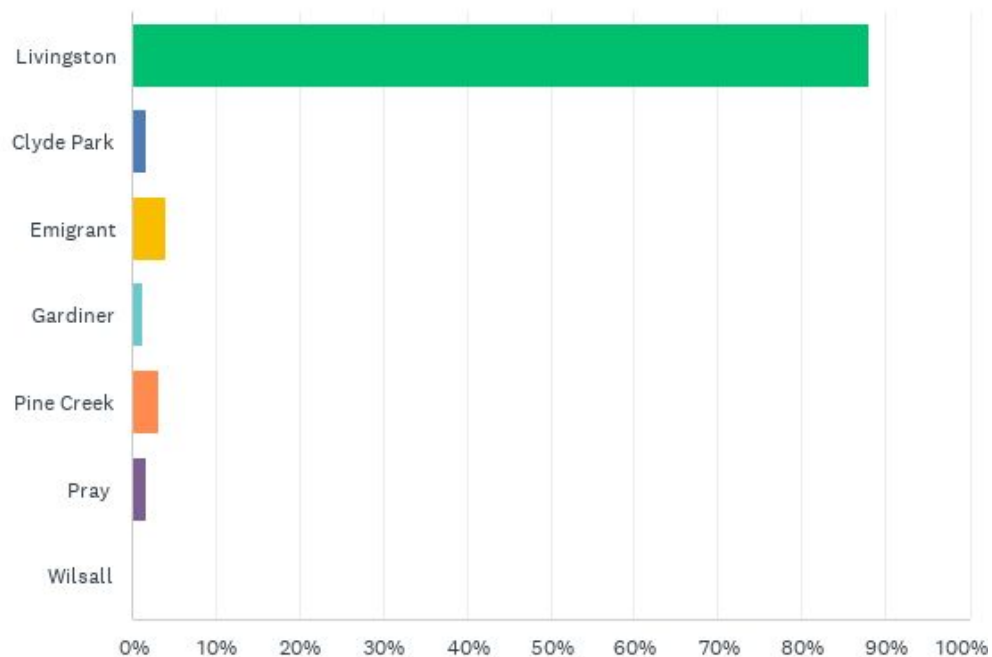
Q12: Your age?

Answered: 229 Skipped: 16



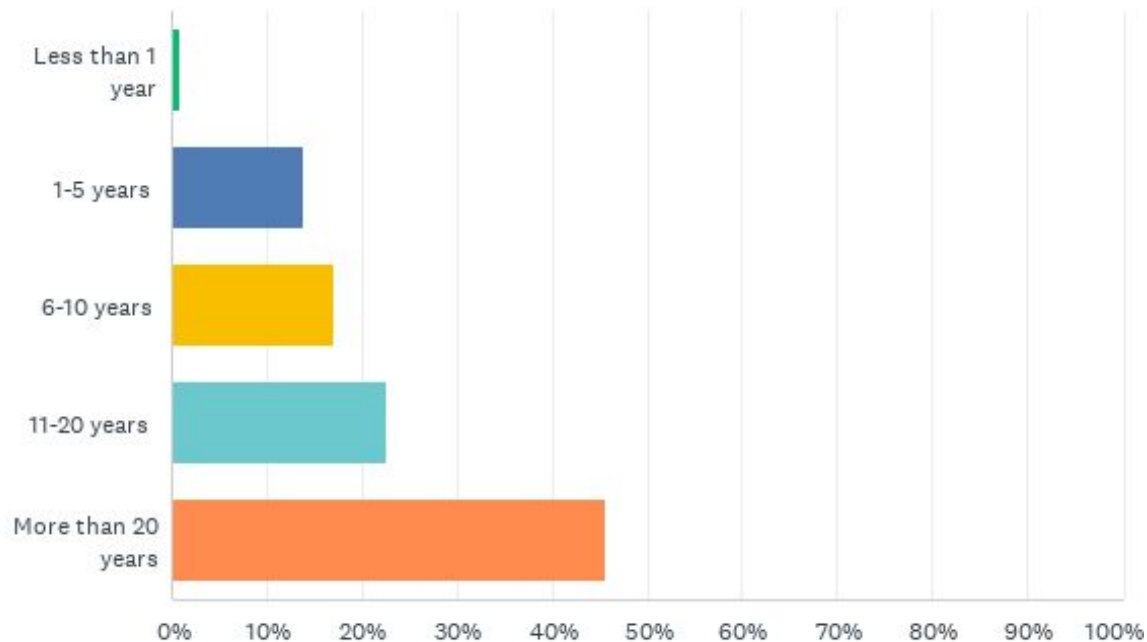
Q13: Your city/town/community?

Answered: 225 Skipped: 20



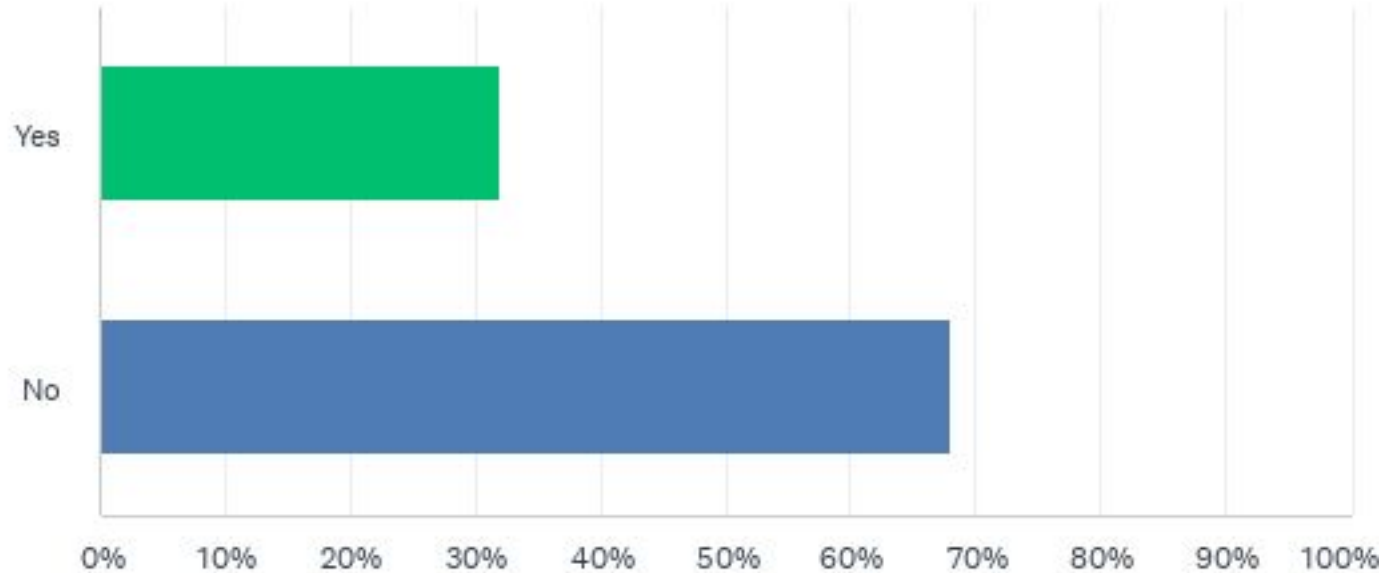
Q14: How long have you lived in the area?

Answered: 230 Skipped: 15



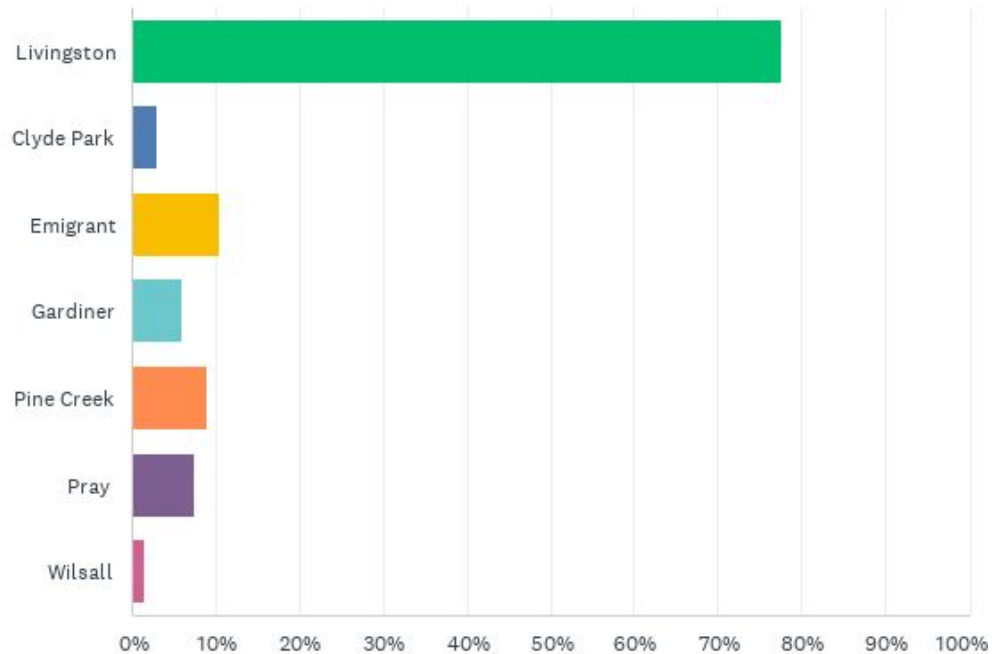
Q15: Are you part of a business or organization related to the hospitality and/or tourism industry?

Answered: 232 Skipped: 13



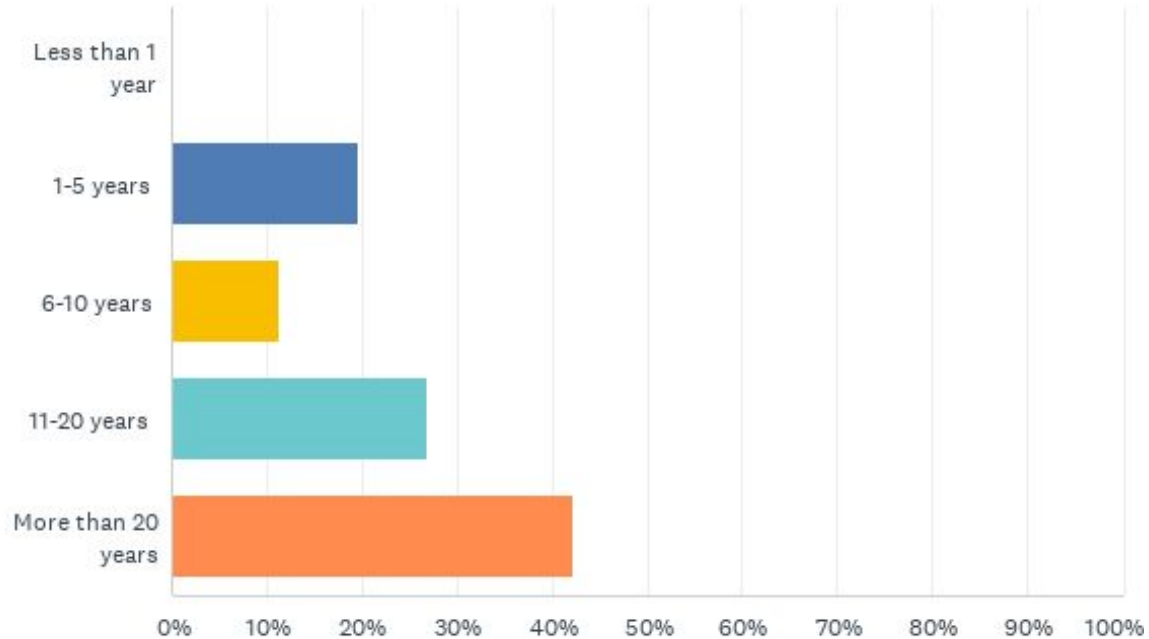
Q16: Where is the business or organization located? Select all that apply.

Answered: 67 Skipped: 178



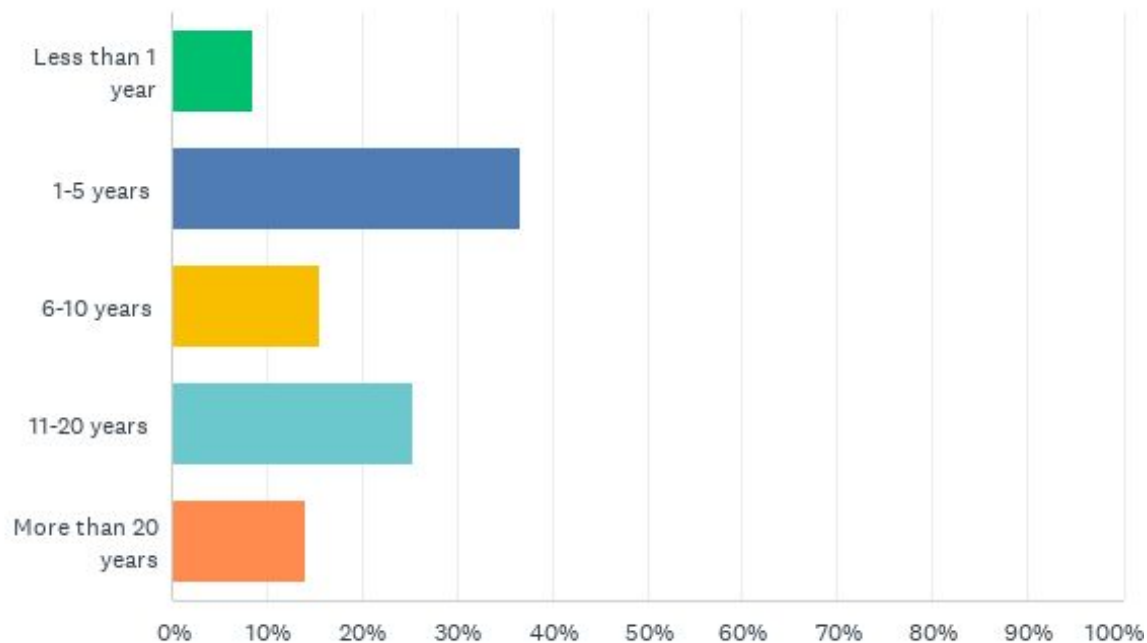
Q17: How long has the business or organization been in operation?

Answered: 71 Skipped: 174



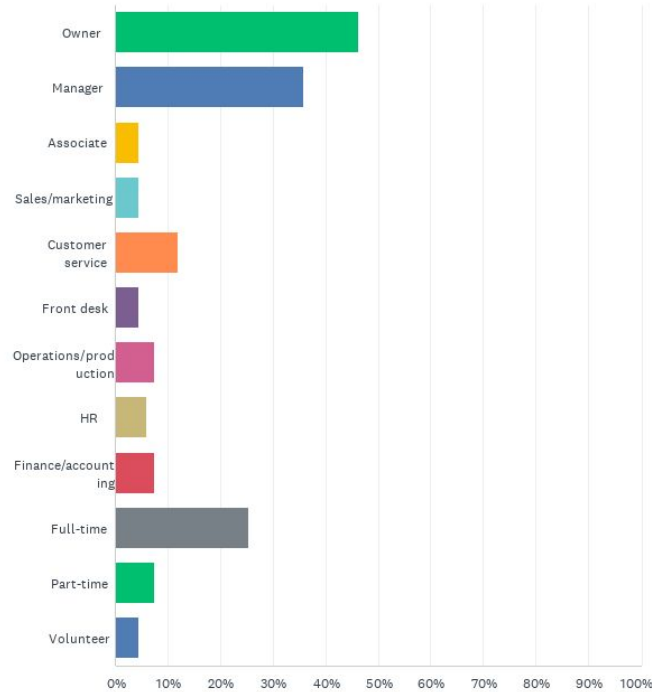
Q18: How long have you been part of the business or organization?

Answered: 71 Skipped: 174



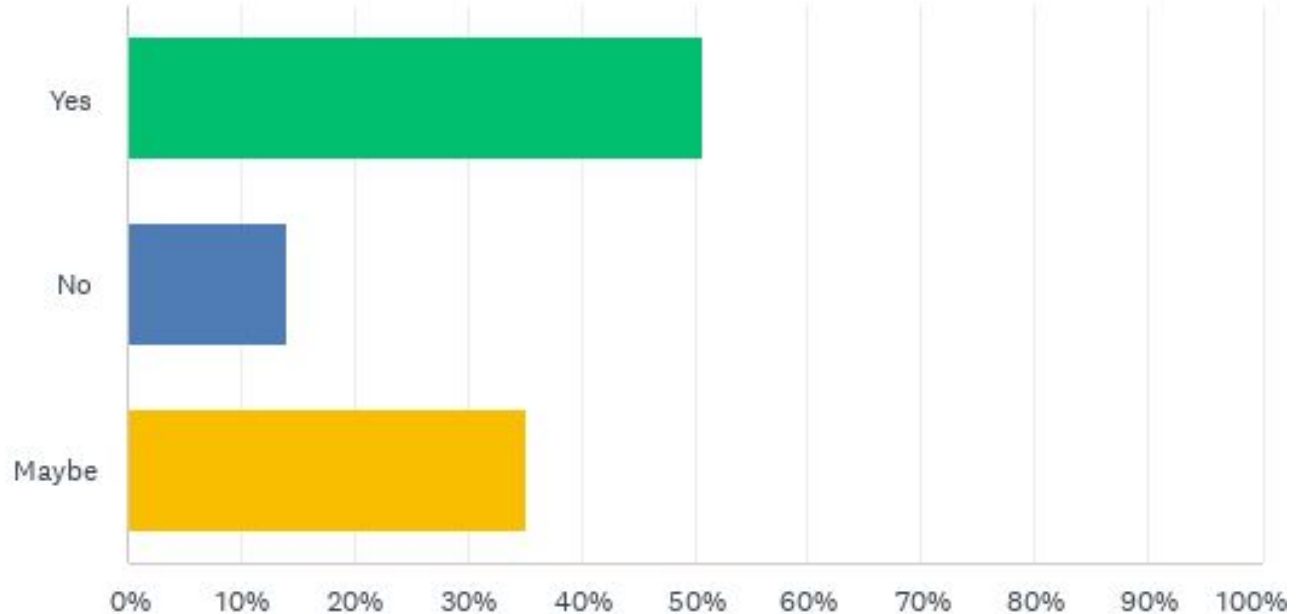
Q19: Which of the following best describes your role at your business or organization? Select all that apply.

Answered: 67 Skipped: 178



Q20: Would your business or organization be willing to share information with tourists and visitors about how they can be good guests during their time here? For example, handing out free bumper stickers, flyers, etc.

Answered: 71





THANK YOU



Livingston **RUSTIC.
REFINED.
LEGENDARY.**