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Report of the 1997 Survey of Citizen Perceptions of Tourism in Bellingham and Whatcom County

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INTRODUCTION

At the request of the Bellingham•Whatcom County Convention and Visitors Bureau, the Western Washington University Office of Survey Research (OSR) surveyed residents of Whatcom County concerning their perceptions of tourism locally. The OSR conducted 606 telephone interviews during the period April 2 through April 22, 1997.

The Convention and Visitors Bureau wished to measure citizen perceptions and knowledge of tourism and to assess what factors lead citizens to be more or less favorable toward tourism. The study is, in this sense, a baseline study of Spring, 1997 perceptions that may change over time. The particular questions asked in this survey were drawn from conversations with the board of the Bellingham•Whatcom County Convention and Visitors Bureau and from previously published research into residents' perceptions of tourism.

The definition of tourism given to each respondent at the outset of the interview is "anyone who travels more than 50 miles, for business or pleasure, and stays overnight." That definition focuses findings on classically defined *tourists*, as opposed to visitors who stay only a short time to shop.

This report presents the findings of the 1997 Bellingham•Whatcom County Tourism survey. It begins with residents' knowledge about tourism, perceptions of positive or negative impacts of tourism, and attitudes toward tourism. It then presents residents' perception of the relative value of several possible uses for economic development funds, including support for the expansion of tourism. The report then presents selected demographic background and other characteristics of the sample and summarizes the ways in which each characteristic is or is not linked to perceptions of tourism. Finally, the report presents the result of multivariate analysis of the "key predictors" of support for tourism, addressing the question of what factors lead residents to more favorable or unfavorable attitudes toward tourism.

NOTES ON METHOD

Telephone numbers were selected at random from all listings in Whatcom County, using a randomizing technique to approximate random digit dialing and ensure anonymity of the calls. The resulting sample resided in approximately the same geographic distribution as the entire population of the county and was closely representative of the county's population with two minor exceptions: interviews included more women than their true proportion in the population and slightly fewer people in the 36-50 age category. Both these departures from representativeness were corrected statistically to ensure that the figures reported here are based on a sample fully representative of the county's population. Although the adjustments made only minuscule differences in findings, the adjusted figures are reported throughout the report.

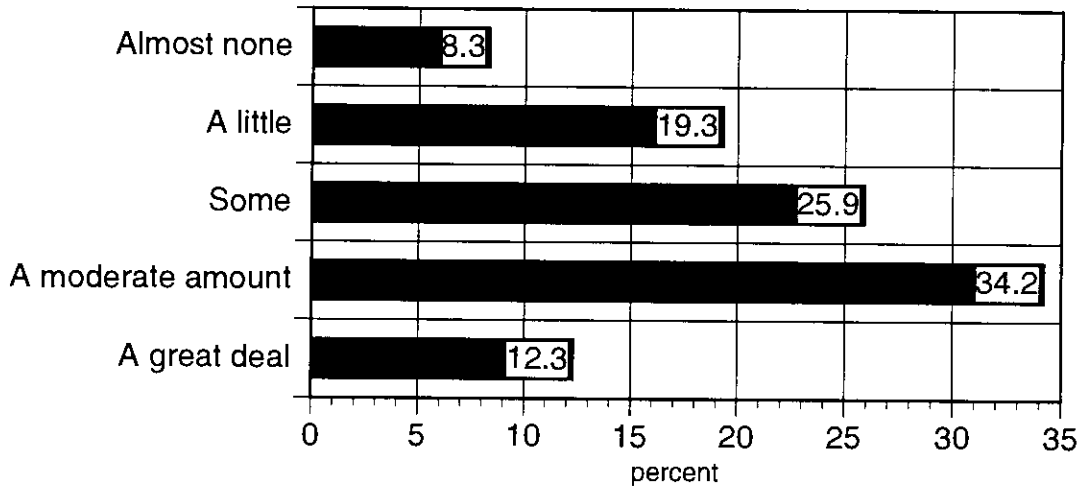
With a sample of 606, the error margin, based on a 95% confidence interval, for typical percentage figures in this report varies around plus or minus 4%. When subgroups are compared, such as Bellingham versus County residents, the errors are larger and are footnoted.

Knowledge Concerning Tourism

The survey asked residents to estimate their own knowledge level on a scale from "a great deal" to "almost none." These self-descriptions are perceptual and subject to error, but they offer one view of peoples' knowledge levels and give us a tool for making comparisons of attitudes toward tourism among those who feel they know more or less about it. Responses varied widely, with over one-third saying "a moderate amount," and others spread across all scale values. Figure 1 displays the findings.

Not surprisingly, people who have lived in Whatcom County longer report greater knowledge of tourism, as do those with higher levels of education. Age is related to knowledge, but only because, on average, older residents have lived here longer. All these differences are

Figure 1. Level of Knowledge Reported by Residents Concerning Tourism in Bellingham•Whatcom County (N=600)



We also asked two other questions that help explain different respondents' knowledge levels. The first asks how much the respondent's personal income depends on tourism. Answers ran from "entirely" to "not at all." Presumably, one who works in a tourist-related industry would have greater knowledge of tourism. This proves to be the case, but to only a modest extent. Two-thirds (68.9%) of residents say their income does not depend on tourism at all, while about one-fourth (26.3%) say "somewhat" or "a little bit" and the remaining 4.8% say "entirely" or "mostly." Those who reported no dependence on tourism at all also reported less knowledge. There were no differences among the others, who report differing levels of dependence on tourism.

The second question asks for preference regarding which pace of development in Bellingham•Whatcom County is best, with responses varying between "to encourage rapid development" and "to stop development as much as possible." The more favorable the resident is to rapid development, the greater knowledge they report concerning tourism.

Perceptions of Tourism: Positive and Negative Impacts

One central theme of this survey is to assess how Whatcom County residents feel tourism affects various aspects of their lives. We asked questions about 12 relatively specific topics and two summary questions regarding the economy and the quality of life. The topics asked about were drawn primarily from previous research. In all cases, citizen *perception* is being measured, rather than knowledge. Beliefs may sometimes be based on faulty knowledge.

For some topics, such as the creation of jobs, the impact of tourism is almost certainly positive, making the only important question how large that impact is. In other cases, such as traffic congestion, the impact is almost certain to be negative, again making the only question how large the impact is. In yet other areas, such as the cost of living for residents, arguments could be made that tourism has a positive or a negative impact. To allow residents to express the full range of perceptions regarding the selected topics, we asked, in each case, whether tourism has "a large positive impact, a small positive impact, no impact, a small negative impact, or a large negative impact." Findings are displayed in Figure 2.

Figure 2. Perceptions of Positive and Negative Impacts of Tourism
(sorted by average score on the scale). (Ns=543-597)

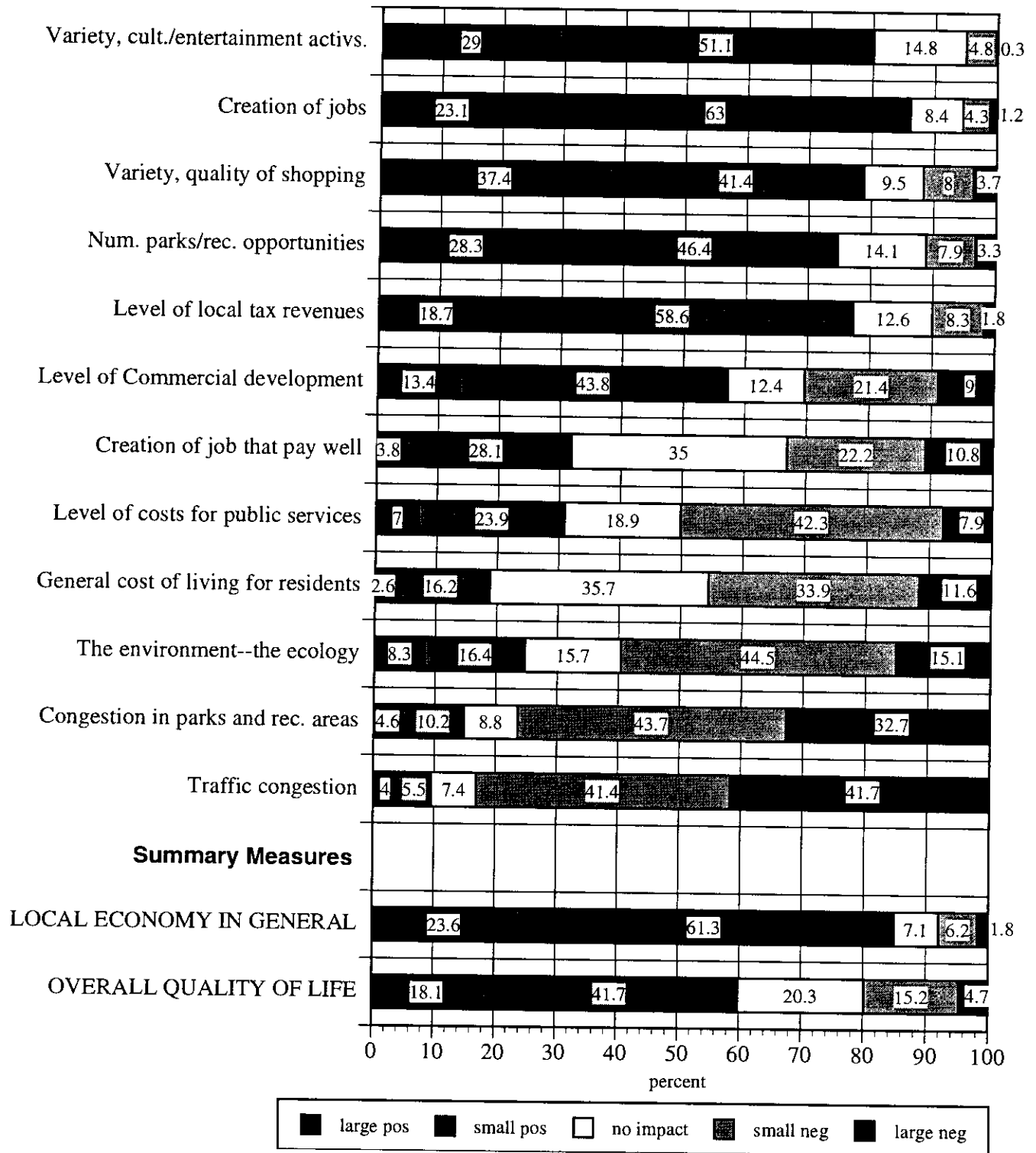


Figure 2 does two things: it ranks residents' perceptions of positive vs. negative impacts of tourism on various aspects of life, and it also shows that, overall, perceptions are quite favorable toward tourism. The balance toward positive judgments in the summary measures is quite strong. In all, 84.9% of respondents see tourism's effect on the local economy as positive, with 23.6% seeing a *large* positive impact. In addition, 59.8% feel that tourism positively affects the "overall quality of life in Bellingham-Whatcom County," while 19.9% see its impact as negative. The difference between these two measures highlights the trend toward seeing impacts on the economy as more positive than the impacts on other quality of life issues, but the balance of judgments is clearly positive for both measures.

Five of the more specific topics we asked about produced at least three-fourths ratings of positive impact, with 18.7% to 37.4% specifying "large positive" impact. Only 5-12% saw negative impacts in these cases. One of these topics is the creation of jobs, where fully 86.1% see a positive impact, although most say it is small. Three others have to do with the benefit to the community of a greater variety of facilities, built in part to attract and engage tourists. These three are "the variety of cultural and entertainment facilities," "the variety and quality of shopping facilities," and "the number of parks and recreational opportunities." The percent who see a *large* positive impact varies from 28.3% to 37.4%. A negative impact is seen by 5.1% to 11.2%.

Over three-fourths (77.3%) of respondents also see a positive impact on "the level of local tax revenues." In this case, the ratings of the 12.6% who see no impact and the 10.1% who see a negative impact are more intriguing than the three-fourths who report a positive impact. By definition, some sales taxes are collected from almost all overnight visitors, increasing the level of local tax revenues. This question therefore has a "correct" answer. The response that tax revenues are not increased by tourism may stem from a confusion about which government bodies receive portions of the sales tax, may represent a confusion between gross tax revenues and net tax flow, may be survey response error, may represent a more sophisticated analysis of *per capita* taxes or of tradeoffs between tourism and whatever alternatives might otherwise exist, or may represent attitudinal bias. While no definitive assessment can be made of these possible explanations, our evidence points to both confusion and attitudinal bias. More highly educated respondents report a negative impact on tax revenues somewhat less often, and those opposing tourism in a variety of other attitude questions also tend more often to report negative effects on taxes, suggesting that a few may have given automatic negative responses.

At the other extreme, for two of the topics we asked about, "traffic congestion on streets and highways" and "congestion in parks and recreational areas," totals of 83.4% and 76.4% see large or small negative impacts with one-third or more (41.7% and 32.7%) seeing *large* negative impacts. For two other topics, "the level of costs for public services such as police, fire, roads and health" and "the environment--the ecology," half or more (51.1% and 59.6%) report negative impacts, although they are seen as large by only 8.9% and 15.1%.

Finally, three topics produced relatively balanced responses, with at least 30% seeing a positive impact and at least 30% seeing a negative impact. "The level of commercial development" produces a majority reporting a positive impact, but 30.4% see a negative impact. "The creation of jobs that pay well" is split almost precisely into thirds, with 31.9% seeing a positive impact, 35.0% seeing no impact, and 33.0% seeing a negative impact.

The level of costs for public services produces a bare majority (50.1%) seeing a negative impact, but also 30.9% seeing a positive impact. This question is similar to the question concerning tax revenues, in that it has a correct answer: having greater numbers of people residing temporarily in an area will increase costs for public services at least slightly. The residents who report positive impact on public costs may misunderstand the question, may be confusing gross costs with net income vs. costs, may be reporting relatively more positive impact than from other industrial sectors, or may be expressing attitudinal bias in favor of tourism. Comparing them with others, we find evidence for both confusion (error) and bias (global support for tourism and for rapid growth).

Other Attitudes Toward Tourism

We asked a variety of attitude questions worded as statements. Respondents expressed their attitude by agreeing or disagreeing with each statement. Findings are summarized in Figure 3.

Whatcom County residents overwhelmingly agree that "Bellingham•Whatcom County is a very desirable place for tourists to visit." Only 6.9% disagree, with another 5.5% undecided. While 87.6% agree, however, only 20.5% answer "strongly agree."

Residents are also quite upbeat about relations between tourists and locals, with more than three-fourths agreeing that most people in each group are "polite and friendly." Very few hold this opinion strongly, however, and 9.0% disagree that residents are polite and friendly, while 12.6% disagree that tourists are polite and friendly.

A fourth question that produces highly positive responses, with 79.5% agreeing, is that "marketing to attract tourists is a good investment for the community." Although 12.1% disagree and 8.4% are undecided, the great majority apparently feel that the benefits of tourism outweigh costs enough to recommend efforts to increase tourism. While the use of the word "investment" might have led respondents to think primarily in terms of the economy, the support expressed in this question is strong.

A majority (59.5%) of respondents also feel that "tourism generates a positive tax flow, because it adds more in taxes paid by tourists than it costs for the government services used by tourists." In this case, however, 26.9% are undecided and 13.6% disagree, meaning that they see a negative tax flow. The level of undecided responses and the fact that only 6.3% agree strongly are consistent with the complexity of the judgment being called for. Majorities agree that taxes increase and that costs for public services increase, but assessing their net balance is more difficult.

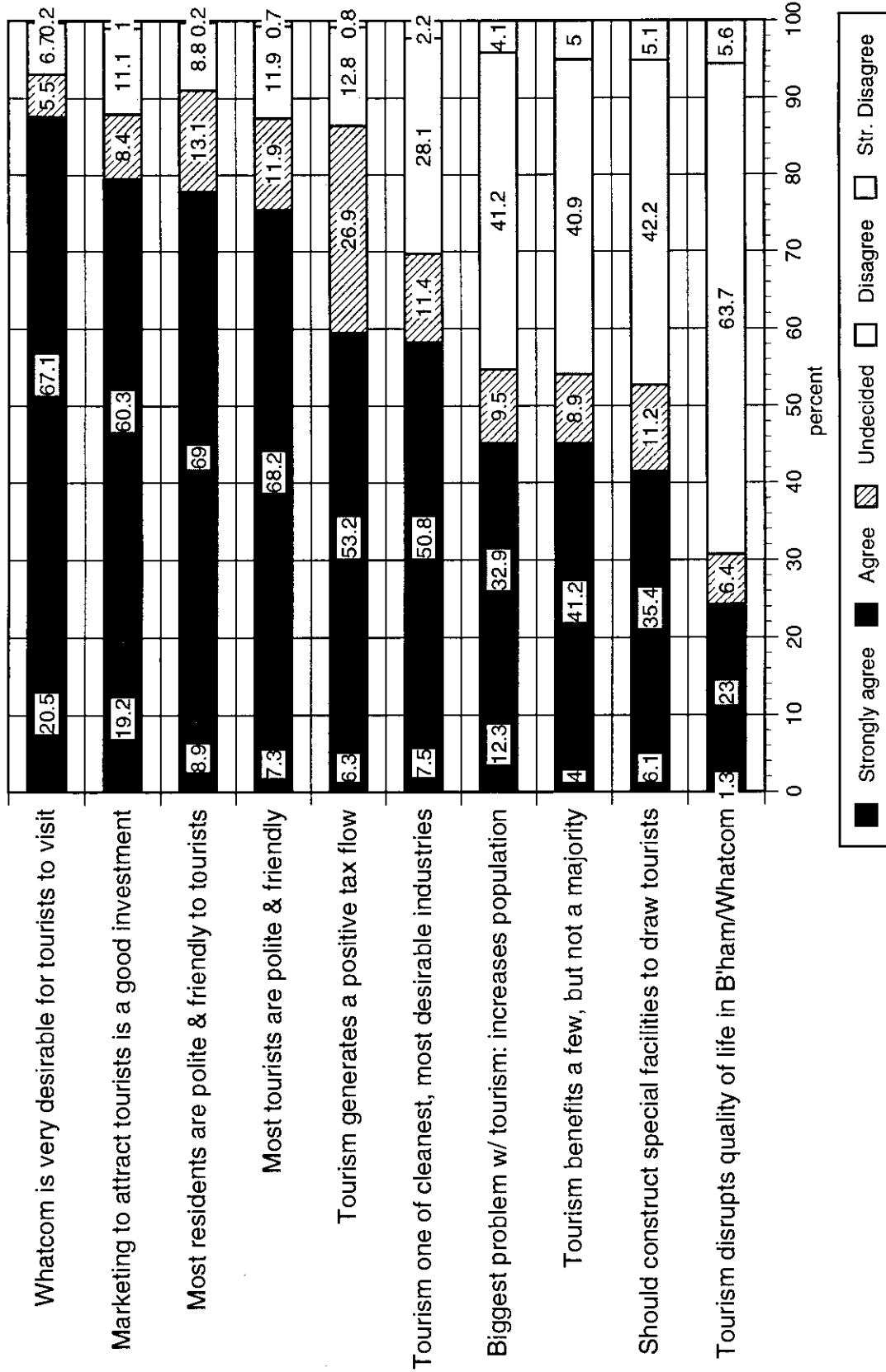
A majority also see tourism as "one of the cleanest and most desirable industries a community can have," although in this case the disagreements grow to 30.3%. This greater mixture of opinion once again highlights the conflict some respondents feel between the perception of positive economic benefits and the perception of problematic non-economic environmental impacts. On the other hand, only 24.3% believe that tourism currently "disrupts the quality of life in Bellingham•Whatcom County."

Three questions generate nearly even balance between agreement and disagreement. The question, "the biggest problem with tourism is that some of the visitors decide to relocate and move to Whatcom County," is a somewhat lighthearted way of measuring the joint perceptions that population growth is too rapid in Whatcom County and that tourism may accelerate that growth. Responses are divided almost evenly, with 45.2% agreeing, 12.3% strongly, and 45.3% disagreeing, 4.1% strongly. As might be expected, those who have lived longest in the area endorse this statement more often than those who have relocated here more recently. Residents who favor limiting the county's rate of growth also agree more often.

Another measure producing almost exactly the same amount of support and opposition is "tourism benefits a few, but not the majority of Whatcom County residents." Here, both agreement vs. disagreement and the intensity of both feelings are equally matched. Respondents who favor reducing the county's rate of growth more often endorse this statement, presumably implying that tourism promotes the interest of developers. Respondents with higher education more often disagree with the statement.

Finally, a third measure that produces almost balanced responses asks whether "Bellingham•Whatcom County should construct special facilities that would draw more tourists here." This is perhaps the most demanding of the survey's questions testing support for expanding the tourist industry since it poses concrete and possibly expensive investments to promote tourism. Responses balance slightly toward opposition, with 41.5% agreeing, 11.2% undecided, and 47.3% disagreeing.

Figure 3. Perception of Tourism Expressed as Agreement or Disagreement with Selected Statements (Ns=602-604)



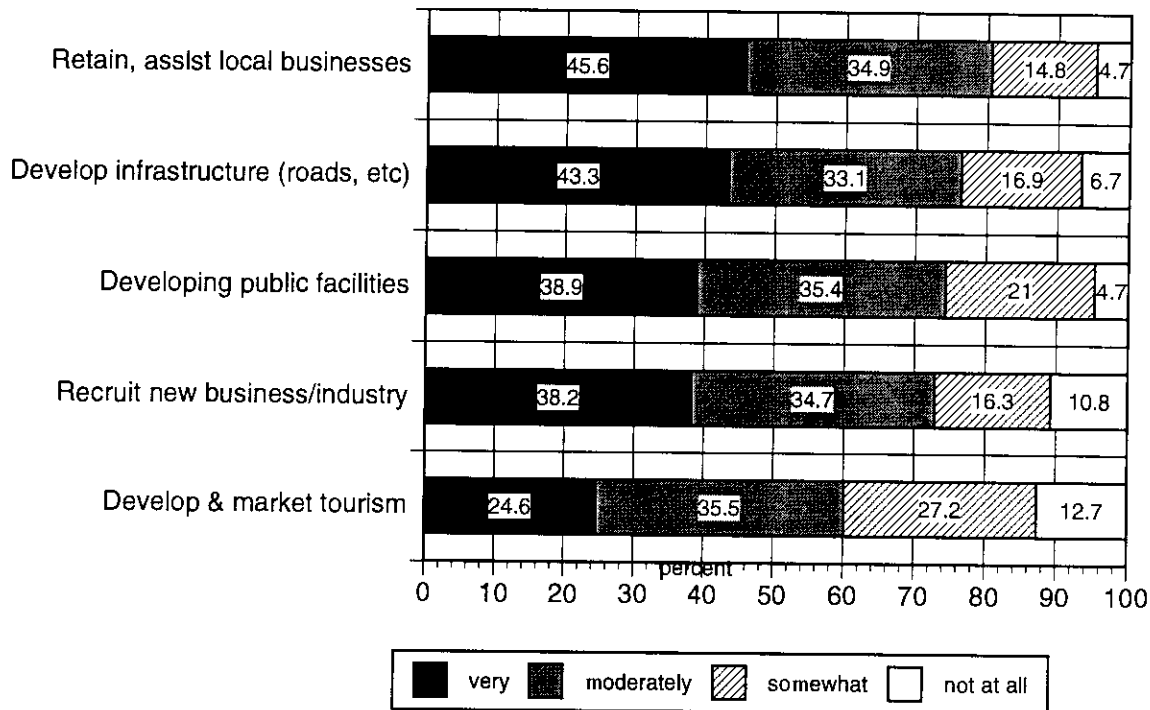
Recommendations for Use of Economic Development Funds

The survey posed a set of questions concerning how valuable residents feel each of five possible uses for economic development funds would be. The pattern of findings, (see Figure 4) show considerable value attributed to all five. All uses are rated at least "moderately" valuable by 60% or more, with around 40% seeing four of the five as "very" valuable.

While some ranking of the alternatives does emerge, the only marked difference involves "developing and marketing tourism," which receives the least support, by a clear margin. The remaining four measures displayed in Figure 4 receive slightly different responses, with "retaining and assisting local businesses" ranked first, "developing infrastructure such as roadways and utilities" and "developing public facilities" tied for second, and "recruiting new business and industry" third. However, the differences in support for these four options are too small to make much of. The top three are statistically indistinguishable, and the fourth is not far behind.

1997 Bellingham/Whatcom County Tourism Survey

Figure 4. How Valuable each Possible Use of Economic Development Funds is Perceived to Be (Ns=573-580)



The most reliable conclusion from the findings in Figure 4 is that, with the exception of the marketing tourism option, over 70% see each of the other options as at least "moderately" valuable and well over a third see each as "very" valuable, while less than one tenth see each as "not at all" valuable. Since Figure 3 shows broad agreement with the idea that marketing to attract tourists is a good investment, the relatively lower ranking of using economic development funds for marketing tourism is best interpreted as illustrating stronger preference for the other uses shown in Figure 4 than as a repudiation of tourism. The same people who say tourism is a good investment are also more supportive of using economic development funds to develop

tourism, but that support is softer than support for the more general uses of supporting local businesses, developing infrastructure, etc.

Comparisons Among Selected Groups

The survey identified several background characteristics that might affect how respondents answered questions regarding tourism. In this section we report the percentages of the sample falling into each category of these characteristics and then summarize a profile of how county residents in each category do or do not differ with regard to attitudes concerning tourism.¹

Age and Years Lived in Bellingham•Whatcom County. We begin with how long respondents have lived in Bellingham and a relatively strong correlate, age. Distributions are reported in Table 1.

Table 1. Age Category and Time Lived in Bellingham•Whatcom County

<u>AGE CATEGORY</u>	<u>PERCENT</u>	<u>YEARS IN AREA</u>	<u>PERCENT</u>
18-25	17.5%	0-1	8.4%
26-35	20.1%	2-4	15.6%
36-50	29.7%	5-9	18.3%
51-65	16.7%	10 or more	57.7%
OVER 65 (N=605)	16.0%	TOTAL	100.0%
TOTAL	100.0% (N=604)		

Surprisingly few attitudes toward tourism are associated with age or time lived in Bellingham. While there is no consistent trend of association between age or time in residence with support for tourism, there are a few associations with specific measures that can be noted. Aside from the findings reported below, differences in attitude and knowledge by age or time in residence are small and therefore not mentioned. Any question included in Figures 1-3 but not mentioned below was answered virtually identically by all age groups and by those living in Whatcom County for different periods of time.

- Older residents more often *agree* that Whatcom County is a “very desirable place for tourists to visit.” For example, people 18-25 agree 77.9% of the time, while those 65 and over agree 95.1% of the time.
- Younger respondents more often *disagree* that “tourism is one of the cleanest and most desirable industries a community can have” (41.1% among those 18-25 vs. 22.3% for those 65 and over).
- Younger respondents more often feel that tourism has a *negative impact* on the environment (71.5% among those 18-25 vs. 50.8% for those 65 and over).
- Residents who moved to Whatcom County most recently appear to place greater emphasis on the creation of jobs. They more often see tourism having a *positive impact* on the creation of jobs (38.3% of those here one year or less see a large positive impact, as opposed to 16.2%

¹ The figures reported here are based on the adjusted sample, after weighting to correct underrepresentation of men and slight underrepresentation of respondents aged 36-50.

of those here ten years or more, and 66.9% say spending economic development funds to retain and support local businesses is “very” valuable, vs. 37.3% of those here ten years of more).

- Long-term residents more often agree that “the biggest problem with tourism is that some of the visitors decide to relocate and move to Whatcom County” (53.7% vs. 37.6%).

Educational Attainment and Employment Status. Two other background characteristics that often influence attitudes and knowledge, education and employment status, also have surprisingly little association with attitudes toward tourism. In particular, students hold remarkably similar attitudes to non-students on most tourism-related issues. The presence of Western Washington University and Whatcom Community College in Bellingham increases the proportion of the population 18 and older who are currently students. Students tend to be slightly more favorable to tourism than others on most measures, but the differences are much too small to make anything of. Distributions for education and employment are reported in Table 2. The only questions answered differently by these groups are then profiled.

Table 2. Educational Attainment and Employment Status

<u>EDUCATION</u>	<u>PERCENT</u>	<u>EMPLOYMENT</u>	<u>PERCENT</u>
H.S. or less	25.3%	Employed ²	58.5%
AA; some college	38.8%	Not employed	8.0%
Bachelors degree	22.7%	Retired	20.8%
Post-bachelors	13.3%	Student, not employed	12.4%
TOTAL	100.0% (N=603)	TOTAL	100.0% (N=599)

- More educated respondents report having somewhat more knowledge concerning tourism, and they more often answer accurately that tourists bring in (have a positive impact on) tax revenue and increase (have a negative impact on) costs for public services. The latter case is one of only two measures where education creates a large difference, with 61.8% of those most highly educated (with graduate degrees) but only 39.8% of those with a high school degree or less see a negative impact.
- Those more highly educated are less likely to agree that “tourism benefits a few, but not the majority of Whatcom County residents” (58.7% of those with post-bachelors degrees vs. 33.4% of those with high school or less disagree).
- Beyond those findings, there is a general, but very weak trend for those with most education have be slightly more favorable attitudes toward tourism but to ascribe slightly less positive effects to it. However, these are very weak effects.
- Those who are employed may be slightly less positive to tourism than others, but the differences are too small to be reliable and often reflect age differences more than employment differences.
- The one case of a reliable, if modest, impact of employment is that those currently working favor slower growth rates for the county and more often agree that tourists relocating here is a problem. Perhaps the security of current employment allows these respondents greater freedom to oppose rapid development.

² Some of these are also students.

Knowledge About Tourism and Dependence on Tourism for Income. The two background characteristics, knowledge concerning tourism locally and dependence of personal income on tourism are, of course, related, although not as strongly as one might imagine. What is clear is that reported knowledge levels are quite high among the few whose income is entirely or mostly dependent on tourism. However, the levels of knowledge reported by the two-thirds who say they are "not at all" dependent on tourism runs the full range. Distributions for education and employment are reported in Table 3.

Table 3. Knowledge Concerning Tourism in Whatcom County and Dependence of Personal Income on Tourism.

<u>KNOWLEDGE</u>	<u>PERCENT</u>	<u>DEPENDENCE</u>	<u>PERCENT</u>
A great deal	12.3%	Entirely	1.3%
A moderate amount	34.2%	Mostly	3.5%
Some	25.9%	Somewhat	10.8%
A little	19.3%	A little bit	15.5%
Almost none	8.3%	Not at all	68.9%
TOTAL	100.0% (N=600)	TOTAL	100.0% (N=600)

- The attitudes toward tourism of those who report greatest and least knowledge are so similar that none is worth singling out, except that those with more knowledge are more definite that Whatcom County is a desirable place for tourists to visit.
- Surprisingly, those who depend most on tourism for income and those who depend least on it display remarkably similar attitudes toward tourism. The one notable exception is that those with greater dependence on tourism are more favorable toward construction of "special facilities that would draw more tourists here."
- Those who depend more on tourism and especially those who report greater knowledge consistently see greater value in all applications of economic development funds, although differences are modest.

Preferred Pace of Development in Bellingham•Whatcom County. One measure that has strong and consistent association with attitudes toward tourism and toward value of economic development expenditures is whether respondents prefer "to encourage rapid development," "to encourage development at a moderate pace," "to limit development to a slow pace," or "to stop development as much as possible." The proportions who give each response are reported in Table 4.

All but two of the questions we asked concerning attitudes toward tourism are related to preferred pace of development. Most are strongly related. Since so many respondents preferred either moderate or slow development, with few at the extremes, the examples of difference cited below all compare these two groups. The more extreme preferences for pace of development are consistently more extreme in their support tourism, as well.

Given the general finding that essentially all attitudes toward tourism are significantly different among those who prefer more rapid and less rapid development, this report does not detail all the findings. The only questions that do not differ significantly are the perception that residents are friendly to tourists, reported impact of tourism on local tax revenues, and perceived value of spending economic development funds for retaining local businesses.

Aside from those measures, all measures of impact of tourism show significantly greater reports of a positive impact among those favorable to the most rapid development, and all agree/disagree questions tapping attitude toward tourism find greater favor among those most supportive of rapid development. Following Table 4, a few of the largest differences are noted.

Table 4. Preference Concerning Pace of Development.

<u>PREFERENCE</u>	<u>PERCENT</u>
Encourage <u>rapid</u> development	3.1%
Encourage development at <u>moderate</u> pace	55.8%
Limit development to a <u>slow</u> pace	35.1%
Stop development as much as possible	6.0%
TOTAL	100.0% (N=599)

- Marketing to attract tourists is supported as a good investment more often by those who favor moderate growth than those who favor slow growth (89.5% vs. 68.1%).
- Moderate growth advocates more often disagree that "tourism benefits a few, but not the majority" (55.4%) than do slow growth advocates (34.8%).
- Moderate growth advocates more often disagree that tourists relocating to Whatcom County is a large problem (54.5%) than do slow growth advocates (36.1%).
- Moderate growth advocates more often disagree that tourism "disrupts the quality of life" locally (78.1%) than do slow growth advocates (58.7%).
- Moderate growth advocates more often agree that tourism generates a positive tax flow (69.5% vs. 50.8%).
- Moderate growth advocates more often agree that "Whatcom County should construct special facilities that would draw more tourists here (50.6% vs. 26.6%).
- Moderate growth advocates more often see a "large positive" impact of tourism on "the variety and quality of shopping facilities" (44.4% vs. 26.6%).
- Of the two summary measures of impact, preferred pace of development makes a greater difference for quality of life than for the economy. Those preferring moderate growth more often see a positive impact on the "local economy in general" by a margin of about ten percent. The difference for the "overall quality of life in Bellingham•Whatcom County" is more than three times that margin, with 77.3% vs. 40.6% reporting a positive impact.

Gender. The unadjusted results of the survey find 40.5% of respondents male and 59.5% female. This bias, that women answer the phone more often and agree to interviews more often, is common among surveys. Our approach was to adjust the sample to more closely reflect the true proportion of women over 18 in county, as estimated by the census for 1996 as approximately 52%.

As it turns out, however, adjusting for gender creates only the tiniest changes in findings because men and women answer questions concerning tourism almost identically. Women are slightly less likely to agree that tourism generates a positive tax flow, slightly more likely to see a positive impact of tourism on cultural and entertainment activities, and less likely to value

spending economic development funds to develop and market tourism. Other questions are answered too similarly to report statistically reliable differences by gender.

Geographical Area of Residence. At the close of the survey, respondents were asked “Which city or town do you live in or closest to?” All respondents, including those living in unincorporated areas, indicated the name of a city or town listed in Table 5. The proportion who list each town is larger than the proportion living within the city limits because of the question wording, which sought out the city of town of reference rather than precise residence.

Table 5. City or Town Closest to Residence.

<u>CLOSEST CITY OR TOWN</u>	<u>PERCENT</u>
Acme	0.8%
Bellingham	72.5%
Blaine	4.3%
Custer	1.7%
Deming	1.8%
Everson	3.5%
Ferndale	7.3%
Lynden	6.0%
Sumas	1.1%
Others	1.0%
TOTAL	100.0% (N=603)

To make comparisons by geographic area more manageable, we grouped the non-Bellingham residences into two categories, one including the three small cities, Blaine, Ferndale, and Lynden, and the other including all others. Following the pattern set by most comparisons reported here, there are only a few significant differences in attitude toward tourism by geographic area. The cases where differences are large enough to be reliable are listed below. For convenience, the three categories of geographic areas are called by shortened terms, “Bellingham,” “three towns,” and “county.”

- Those residing in the county category more often agree that tourism benefits a few, but not the majority.
- Those in the county category less often agree that tourism is the “cleanest and most desirable” of industries.
- Three towns residents more often see a positive impact of tourism on the production of jobs that pay well.
- Bellingham residents see a less positive impact of tourism on the variety and quality of shopping facilities.
- Three towns residents are less likely to see a negative impact of tourism on the environment.
- Tourism’s impact on traffic congestion is least often seen as negative by three towns residents and most often seen as negative by county area residents, with Bellingham in-between.

- The same pattern is true of perceived impact of tourism on the local economy and on overall quality of life: three towns residents are most and county residents least favorable for both questions.

What Predicts How Favorable or Unfavorable Respondents are to Tourism?

One of the Convention and Visitors Bureau's goals for this survey was to assess what attitudes, knowledge, or orientations lead people to be more or less supportive of tourism as an industry and toward enlarging that industry. The best strategy for determining what might lead one to become more or less supportive of tourism is to examine the beliefs and perceptions of people who are already more supportive vs. less supportive of tourism.

A NOTE ON ANALYSIS OF KEY PREDICTORS

The method best suited to address this question is multivariate analysis--the identification of what we might call "key predictors." Many factors may be associated with attitude toward tourism without actually influencing that attitude. Multivariate analysis simultaneously tests a set of measures against each other, to see which are most likely to be the driving influences. For example, age, employment, and number of years lived here overlap a great deal because people who have lived here 60 years must be at least 60 years old and are also much more likely than others to be retired. If any one of these factors is a key predictor of attitude toward tourism, the others will appear to be also, until tested as possible key predictors.

Key predictors are the factors found most likely to have an impact on attitude toward tourism. The method estimates unique effects of each key predictor, while also estimating a zero effect for factors not identified as key predictors. We can say, therefore, that the impact of any key predictor is an impact over and above the impact of all other key predictors. Key predictors are also additive. If three different perceptions all increase support for tourism and I hold all three, then I will be triply more likely to support tourism, as each effect accumulates. Finally, the method gives us estimates of how large the impact of each key predictor is likely to be. No factor is identified as a key predictor unless it has been shown to have a statistically reliable unique additive impact, yet some impacts can be much larger than others.

Appendix B displays estimates of the impact by key predictors on four outcomes--indicators of support for tourism. Below, the main findings of each of these four analyses are summarized. For detail, see Appendix B.

Marketing Tourism. The first outcome (indicator of support for tourism) is support for marketing tourism as a way of enlarging the industry. This outcome is measured by the combination of two questions from the survey: Question 4, "Marketing to attract tourists is a good investment for the community" (agree/disagree) and Question 13c, how valuable a use of economic development funds is "developing and marketing tourism." Of the 35 survey questions tested, 13 emerge as key predictors--an unusually large number. Most effects are modest, but two are particularly strong. In total, we are able to explain 46% of the total variation in people's attitude toward marketing tourism by knowing these 13 key predictors.

The key predictor with largest impact reminds us that investing in mechanisms to enlarge tourism is seen as desirable only if enlarging tourism is a desirable goal. Residents who prefer more rapid development of the county are also more favorable toward investing in enlarging the tourist industry. Presumably, they favor enlarging all industries, although we did not ask that question and so have no direct evidence.

The second strongest key predictor taps the perception that tourism pays off in the public sector--that tourism generates a positive tax flow. This key predictor is particularly important because it involves peoples' perception of a phenomenon that is in fact "knowable," albeit subject to some error. Analysis could be done to demonstrate with fair certainty whether tourism in Whatcom County produces a positive or negative tax flow. That knowledge would have the impact of changing citizen support for marketing tourism, either increasing it or decreasing it, depending on whether the tax flow is positive or negative.

Four other key predictors are all similar in the magnitude of their impacts, each contributing a noticeable, but modest impact on support for marketing tourism. Interestingly, these are more attuned to social and quality of life issues than to hard economic realities.

- the more people believe that tourism benefits only a few and not the majority, the less supportive they are of marketing to increase tourism.
- The more people perceive that tourism is especially clean and desirable as an industry, the more supportive they are of marketing to increase tourism.
- The more people believe tourism disrupts the quality of life here, the less supportive they are of marketing to increase tourism.
- The more people believe that tourists are polite and friendly, the more supportive they are of marketing to increase tourism.

While each of these four perceptions includes an element of ideologically driven bias (each correlates quite strongly with preference for rapid or slow development, for example), each is also subject to change based on careful factual analysis of tourism locally. How many residents are benefited in what degree by tourism? If many, support grows; if few, it declines. How clean are various industries in Bellingham? How many feel that their quality of life is disrupted by tourism? Our survey estimates 24.3% agree that it does, while 69.4% feel it does not. That information in itself may have an impact on those who learn it, although we have no knowledge of what figures would be perceived as "high" and what "low." Similarly, we find three-fourths of respondents reporting that tourists are polite and friendly. The others may have had bad experiences. Reports by residents with good and bad experiences may influence support or opposition to marketing tourism.

Other key indicators have smaller impacts but still provide guidance as to what information might change residents' perceptions include whether or not tourism helps create high paying jobs, what impact tourism has on the level of commercial development in the county, what impact tourism has on the general cost of living in the county, and residents' level of knowledge in general about tourism. In addition, the perception that Whatcom County is a desirable place for tourists to visit also increases support for marketing tourism.

Two additional key indicators influence support for marketing tourism but are unlikely to change and therefore cannot change peoples' attitudes toward tourism: educational attainment and gender. Men and those with higher educational attainment are more supportive of marketing tourism.

Positive Impact on the Economy in General. The second outcome analyzed for key indicators is the perception that tourism has a positive or negative impact on "the local economy in general." In this case, ten key indicators account for 30% of the variation in the outcome.

The only key indicator that has a substantial impact on citizens' perception of tourism's impact on the economy is the perception of tourism's impact on commercial development. That measure is by definition closely linked to the economy. Other key predictors may be grouped as economic vs. social/quality of life.

Economic key predictors include perceived impact of tourism on the creation of jobs and the creation of high paying jobs, the perception that tourism generates a positive tax flow, and the perception that it has little impact on costs for public services. In addition, respondents who are currently employed are somewhat less positive about tourism's impact.

Key predictors that are less explicitly economic include the perception that tourism is a clean industry, which increases perceived positive impact, the perception that tourism disrupts quality of life locally, which decreases perceived positive impact, and the twin perceptions that tourism increases the variety and quality of shopping and the variety of cultural and entertainment opportunities, both of which increase perceived positive impact of tourism on the local economy.

Positive Impact on Quality of life. This summary outcome taps the non-economic side of support for tourism. It is combined from two questions: Question 9, "tourism disrupts the quality of life in Bellingham•Whatcom County (agree/disagree), and question 11n, positive vs. negative impact of tourism on the "overall quality of life in Bellingham•Whatcom County." Ten key indicators explain 42% of the variation in this outcome.

The most powerful key predictor of perceived positive impact of tourism on quality of life is the perception that tourism increases the number of parks and recreational opportunities. In addition, two other quite strong effects are found: the perception that tourism is a clean, desirable industry increases belief that tourism has a positive impact on quality of life, and the concern that some of the visitors drawn here subsequently relocate to Whatcom County decreases perception of positive impact on quality of life. These three have in common that they involve impacts on residents' own quality of life--having more recreational opportunities opened up for myself because they were constructed in response to the tourist trade, etc.

Weaker key predictors of perceiving a positive impact of tourism on quality of life include disagreeing with the statement that tourism benefits a few, but not the majority, the perception that tourism does not have a negative impact on the environment, the perception that tourism does not seriously increase congestion in parks and recreational areas, the perception that tourists are polite and friendly, the perception that tourism increases commercial development, and the respondent's level of knowledge concerning tourism locally. In addition, those who prefer more rapid development in Whatcom County also perceive a more positive impact of tourism on quality of life.

Support for Building Facilities to Increase Tourism. This outcome provides a concrete, somewhat specific indicator of residents' readiness to commit tax resources to increase tourism, as well, perhaps, as improving facilities for residents. The outcome is the combination of two measures: question 10, "Bellingham•Whatcom County should construct special facilities that would draw more tourists here," and question 12d, the value of using tourist-related funds for "planning and developing new facilities such as a conference center or aquarium." Seven key predictors explain 29% of the variation in this outcome.

Three of the key predictors have considerably stronger impacts than the others. Residents who prefer more rapid development are considerably more supportive of constructing new tourist-oriented facilities. Similarly, those who agree that marketing tourism is a good investment support building new facilities. These two key predictors seem obvious enough. A third strong key predictor is also logical, but in a less obvious way: those who see tourism as impacting the number of parks and recreational opportunities most positively are also most supportive of building new tourist-oriented facilities. This key predictor taps one aspect of a growth orientation: positive evaluation of growth in recreation.

Four key indicators have small, but statistically reliable impacts. The perception that tourism creates jobs, the perception that tourism generates a positive tax flow, and the perception that tourism has had a positive impact rather than a negative impact on the general cost of living locally all lead to greater support for building tourist-oriented facilities. The perception that tourism benefits a few, but not the majority, has the opposite effect.

Key Predictors and Overall Support for Tourism. It is logical that key predictors would differ somewhat for each of the four outcomes analyzed here. One emphasizes quality of life while another emphasizes the economy. The other two speak to the expenditure of resources, with emphasizing marketing activities while the other debates rather more expensive capital construction. However, it is also of interest to see that some key predictors emerge in more than one of these analyses, making them particularly central to the global issue of support for vs. opposition to growth of tourism. This section reviews these central, repeated key predictors.

The consistently most powerful key predictor is preferred pace of development. It is a key predictor of all but perceived impact on the economy and it is the most powerful key predictor for both outcomes having to do with the expenditures of funds to enlarge tourism. This key predictor is so powerful for the same reasons that make it irrelevant to the question of whether residents' attitudes toward tourism can be changed by the addition of new knowledge: it is a basic ideological statement that encompasses a wide range of political and social preferences and that will tend to be quite stable. The most important knowledge provided by learning how central this key predictor is to any analysis of tourism, is that residents quite closely link tourism, and especially the growth of tourism, with development in general.

Four other questions on the survey emerge as key predictors in three of the four analyses. Each of these key predictors has significant impacts on three of the four outcomes we analyzed, and each has a strong impact on at least one of those outcomes. Support for tourism is greater if:

- tourism is seen as benefiting the majority of residents, not just a few.
- tourism is believed to generate a positive vs. a negative tax flow
- tourism is seen as one of the "cleanest and most desirable industries" that could build here.
- tourism is believed to have a positive impact on the level of commercial development locally.

These four key predictors have the value that they concern issues about which reliable information can be generated. While the analyses may not be easy, in each case factual information can be generated: how many residents are affected in what ways, what the net tax flow is, environmental impact of various industries, and the impact of tourism on commercial development. To the extent that accurate information is made available, resident attitudes toward tourism should change in the direction predicted. That is, if the tax flow turns out to be positive, publicity of that conclusion will generate greater support for tourism. If it is negative, support will erode.

Seven other measures are identified as key indicators in *two* of the four analyses. These also recommend themselves as of particular interest in the matter of setting public attitudes toward tourism. Support for tourism is higher if residents report that:

- tourists are polite and friendly.
- tourism does not disrupt quality of life.
- tourism creates jobs.
- tourism creates high paying jobs.
- tourism increases the number of parks and recreational opportunities.
- tourism has a relatively positive impact on the general cost of living.
- they have relatively great knowledge about tourism.

Conclusion

In broad strokes, this survey finds overall support for tourism to be quite high. Residents realistically see a pattern of positive and negative impacts, with the majority averaging these so as to perceive the overall impact positively and to be rather favorable toward investments that increase tourism in the area. This pattern of support is not universal, but it is widespread. Also, the support may be characterized as "soft" in that the great majority of responses to questions avoided strong expressions of support--small, not large, positive impacts are seen, etc. This means that residents' attitudes toward tourism are malleable--can be strengthened or eroded relatively easily by new information.

One pattern of importance is that perceptions of tourism are much more positive in the economic realm than in the environmental/quality of life realm. There is very wide agreement that tourism has a modest positive impact on the economy. In the environment/quality of life area, both positive and negative impacts are seen. While a majority averages these positively, that majority is far smaller than in the case of economic impacts.

In both the economic and environment/quality of life areas, there appear to be two key concepts that help understand residents' perceptions. The first is ideological, for want of a better word. Residents' general orientation toward growth and development is a strong and consistent predictor of their support for tourism and especially for the possibility of enlarging tourism. The second issue is how residents feel tourism affects the lives of residents--themselves and their neighbors. Does tourism build the tax base, increase recreational opportunities, provide new jobs with minimal pollution, etc? And does tourism have these effects on all of us, not only developers or motel owners?

On the other hand, attitude toward tourism is much less closely tied to social position than one might expect. Frequently, attitudes are different for the more vs. less educated, older vs. younger, female vs. male, Bellingham vs. county resident, etc. The survey found a few such differences in attitude toward tourism, but the overall pattern was one of minimal difference. Even the very direct issue of economic dependence on the tourism industry had much less impact on attitudes toward tourism than the more ideological issue of preference for faster or slower development.

Finally, we can to a substantial degree explain who feels greater support for vs. opposition to tourism. It is particularly important that many of the factors explaining support involve perception of factual information. That is, widespread publicity of findings from careful analysis of the facts in each of these cases has the potential to produce considerable change in residents' attitudes toward tourism. The direction and degree of the change would depend on the nature of the findings.

Appendix A

The Survey

CONVENTION AND VISITORS BUREAU SURVEY

4/1/97

To begin, I'm going to read some statements about tourism in Whatcom County and ask you to indicate whether you agree or disagree with each one.

I should note that a tourist is defined as anyone who travels more than 50 miles, for business or pleasure, and stays overnight.

The first statement is.....

1. Bellingham • Whatcom County is a very desirable place for tourists to visit. Do you.....
1. Strongly agree 2. Agree 3. Feel undecided 4. Disagree or 5. Strongly disagree
2. Most tourists are polite, friendly people.
1. Strongly agree 2. Agree 3. Undecided 4. Disagree 5. Strongly disagree
3. Most Bellingham • Whatcom County residents are polite and friendly to tourists.
1. Strongly agree 2. Agree 3. Undecided 4. Disagree 5. Strongly disagree
4. Marketing to attract tourists is a good investment for the community.
1. Strongly agree 2. Agree 3. Undecided 4. Disagree 5. Strongly disagree
5. Tourism benefits a few, but not the majority of Whatcom County residents.
1. Strongly agree 2. Agree 3. Undecided 4. Disagree 5. Strongly disagree
6. Tourism generates a positive tax flow, because it adds more in taxes paid by tourists than it costs for the government services used by tourists.
1. Strongly agree 2. Agree 3. Undecided 4. Disagree 5. Strongly disagree
7. The biggest problem with tourism is that some of the visitors decide to relocate and move to Whatcom County.
1. Strongly agree 2. Agree 3. Undecided 4. Disagree 5. Strongly disagree
8. Tourism is one of the cleanest and most desirable industries a community can have.
1. Strongly agree 2. Agree 3. Undecided 4. Disagree 5. Strongly disagree
9. Tourism disrupts the quality of life in Bellingham•Whatcom County.
1. Strongly agree 2. Agree 3. Undecided 4. Disagree 5. Strongly disagree
10. Bellingham • Whatcom County should construct special facilities that would draw more tourists here.
1. Strongly agree 2. Agree 3. Undecided 4. Disagree 5. Strongly disagree

11. Now I'll read a list of things some people say may be benefits or costs of tourism. I'll ask whether you think tourism has any impact on each thing I'll read, and if so, whether the impact is positive or negative, and whether it is large or small.

First, the creation of jobs. Does tourism have a large positive impact, a small positive impact, no impact, a small negative impact, or a large negative impact on the creation of jobs?

	<u>Positive</u>		<u>No</u> <u>impact</u>	<u>Negative</u>		<u>Don</u> <u>Know</u>
	<u>large</u>	<u>small</u>		<u>small</u>	<u>large</u>	
a. CREATION OF JOBS	1	2	3	4	5	9
b. The creation of jobs that <u>pay well</u>	1	2	3	4	5	9
REPEAT SCALE AS NECESSARY						
c. The level of local <u>tax revenues</u>	1	2	3	4	5	9
d. The level of <u>costs</u> for public services such as police, fire, roads, and health	1	2	3	4	5	9
e. The variety and quality of shopping facilities	1	2	3	4	5	9
f. The environment--the ecology	1	2	3	4	5	9
g. The variety of cultural and entertainment activities	1	2	3	4	5	9
h. The number of parks and recreational opportunities	1	2	3	4	5	9
i. Congestion in parks and recreational areas	1	2	3	4	5	9
j. Traffic congestion on streets and highways	1	2	3	4	5	9
k. The general cost of living for residents	1	2	3	4	5	9
l. The level of commercial development	1	2	3	4	5	9
m. The local economy in general	1	2	3	4	5	9
n. Overall quality of life in Bellingham/Whatcom County	1	2	3	4	5	9

12. By state law, the hotel/motel tax is set aside to fund tourism-related activities. I'll read some things these funds could be used for. Please rate how valuable you think each use would be--very...moderately...somewhat...or not at all... valuable.

	<u>VERY</u>	<u>MOD</u>	<u>SOME</u>	<u>NOT</u>	<u>D.K.</u>
a. Developing improved materials such as maps and brochures for visitors	1	2	3	4	9
b. Marketing to increase tourism	1	2	3	4	9
c. Maintaining the Visitors Bureau and visitor information center	1	2	3	4	9
d. Planning and developing new facilities such as a conference center or aquarium	1	2	3	4	9
e. Supporting festivals or other special events for tourists	1	2	3	4	9

13. Now, I'll read some ways economic development funds could be spent. Please rate how valuable each of these would be: ... very...moderately...somewhat...or not at all... valuable..

	EXTR	VERY	SOME	NOT	D.
a. Retaining and assisting local businesses	1	2	3	4	9
b. Developing infrastructure, such as roadways and utilities	1	2	3	4	9
c. Developing and marketing tourism	1	2	3	4	9
d. Recruiting new business and industry	1	2	3	4	9
e. Developing public facilities	1	2	3	4	9

14. How much knowledge do you have concerning tourism in Bellingham • Whatcom County?
Would you say....

1. a great deal 2. a moderate amount 3. some 4. a little or 5. almost none

Finally, we need to ask a few questions about you, so that we can know a bit more about the people included in the survey.

15. How long have you lived in Bellingham?

1. 0-1 years 2. 2-4 years 3. 5-9 years 4. 10 or more years

16. Which category does your age all into: [READ CATEGORIES]

1. 18-25 2. 26-35 3. 36-50 4. 51 to 65 5. above 65

17. Are you currently..... (OK TO MARK STUDENT AND ONE OTHER)

1. Employed full- or part-time 2. Not employed 3. Retired
4. A full-time student

18. What is the highest level of education you have completed? READ RESPONSES AS NEC.)

1. H.S. OR LESS
2. AA OR SOME COLLEGE
3. COLLEGE (BACHELORS)
4. POST BACHELORS

19. In general, which do you think is best for Bellingham • Whatcom County.....

1. to encourage rapid development
2. to encourage development at a moderate pace
3. to limit development to a slow pace

or 4. to stop development as much as possible

20. How much does your personal income depend on tourism, if at all? Would you say it is

1. Entirely 2. Mostly 3. Somewhat 4. A little bit or 5. not at all dependent on tourism

21. Which city or town do you live closest to (READ ONLY IF NECESSARY):

- | | | | |
|-----------|-----------------|-------------|-----------|
| 1. ACME | 2. BELLINGHAM | 3. BLAINE | 4. CUSTER |
| 5. DEMING | 6. EVERSON | 7. FERNDALE | 8. LAUREL |
| 9. LYNDEN | 10. MAPLE FALLS | 11. SUMAS. | |

Thank you very much for your cooperation. We appreciate your time. If you wish to add any comments regarding tourism, feel free, and I will record them.

INTERVIEWER RECORD: 1. MALE 2. FEMALE

Appendix B.
Multiple Regression Analysis of Four Indicators of Support for Tourism

		<u>Market Tourism*</u>	<u>Positive on Economy*</u>	<u>Positive on Quality life*</u>	<u>Support Building*</u>
Q1.	Whatcom desirable to visit	.23/.11**			
Q2.	Tourists are polite, friendly	.23/.12		.22/.10	
Q4.	Marketing tourism a good investment			***	.42/.21
Q5.	Tourism benefits a few, not most	-.20/-.14		-.26/-.17	-.13/-.08
Q6.	Tourism generates a positive tax flow	.33/.17	.09/.09		.22/.10
Q7.	Problem: some visitors relocate here			-.24/-.16	
Q8.	Tourism is clean, desirable industry	.19/.13	.07/.08	.29/.17	
Q9.	Tourism disrupts quality of life here	-.20/-.12	-.09/-.10		
Q11a.	Impact on creation of jobs		.14/.13		.25/.11
Q11b.	Impact on creation of high paying jobs	.15/.10	.11/.12		
Q11d.	Impact on cost for public services		.05/.06		
Q11e.	Impact on variety/quality of shopping		.10/.13		
Q11f.	Impact on the environment			.17/.12	
Q11g.	Impact on variety of cult/entertainment		.10/.09		
Q11h.	Impact on number parks/recreation			.35/.21	.32/.18
Q11i.	Impact on congestion in parks/rec.			.15/.10	
Q11k.	General cost of living here	.11/.06			.18/.10
Q11l.	Level of commercial development	.13/.10	.14/.18	.15/.10	
Q14.	Knowledge concerning tourism here	.08/.06		.10/.06	
Q17.	Currently employed		.13/.07		
Q18.	Highest education attained	-.14/-.09			
Q19.	Prefer more rapid development	.47/.20		.31/.12	.61/.22
Q22.	gender (female)	.27/.08			
	R ² (variance explained)	.46	.30	.42	.29

(See next page for footnotes)

* Measures:

Market Tourism: Combination of Q4 ("marketing to attract tourists is a good investment for the community") and Q13c "how valuable a use of economic development funds is "developing and marketing tourism"). The result is an eight point scale.

Positive Impact on Economy: Q11m (positive vs. negative impact on "the local economy in general"). A five point scale.

Positive Impact on Quality of Life: Combination of Q9 (disagree that "tourism disrupts the quality of life in Bellingham•Whatcom County") and Q11n (positive vs. negative impact on "overall quality of life in Bellingham•Whatcom County"). The result is an eight point scale.

Support for Building Facilities: Combination of Q10 ("Bellingham•Whatcom County should construct special facilities that would draw more tourists here") and Q12d (Value of using tourist-related funds for "planning and developing new facilities such as a conference center or aquarium"). The result is an eight point scale.

** Figures shown in Appendix A are regression slopes and Betas (standardized regression slopes). These are two ways of expressing findings, each with its own use. Both indicate an impact of one variable (the one listed at the left) on the outcome variable (listed at the top of each column). That impact is estimated to occur above and beyond all other impacts listed in the table. All questions in the survey (see appendix A) were tested for effects. Where no figure is recorded in Appendix B, that survey question is estimated to have no unique impact. Sometimes no figure is indicated across from a question listed at the left in Appendix B. Other questions are omitted entirely from Appendix B because they had no impact on any of the outcomes tested.

The first figure (left of the slash) shows how many points difference on the outcome scale is uniquely determined by one point difference on the scale of the question listed at the left. For example, people who "agree strongly" that Whatcom County is a desirable place to visit score .23 higher on the "market tourism" outcome scale than those who only "agree." Similarly, those who agree score .23 higher on the outcome than those who are undecided, and so forth. If a respondent scores two points higher on Whatcom county as a good place to visit, then their support for marketing tourism is .46 (twice .23) higher, and so forth. The value of this figure is its precision.

The second figure (right of the slash) will prove more useful for novice analysts. These Betas are standardized to make them comparable in ways the unstandardized regression slopes are not. The larger the Beta, the more of the variation in the outcome is explained by the variable at the left of the page. That is, roughly, the bigger the Beta the more powerfully the concept tapped by the survey question listed at the left of the page determines how favorable respondents feel about marketing tourism, tourism's impact on the economy, tourism's impact on the quality of life, or the value of building new tourism-related facilities. For example, respondents' assessment of whether tourism produces a positive or negative tax flow has a rather large impact on whether they favor marketing tourism, as shown by the Beta of .33. Respondents' general preference for rapid or slow development in Whatcom County has an even greater impact, shown by the Beta of .47. On the other hand, how much the respondent knows about tourism has only a small impact on attitude toward marketing tourism, with a Beta of .08.

Each time a Beta (or slope) is listed, there is some unique and important impact of the factor in question; whenever no figures are listed, the estimated impact of the factor in question is zero. However, when the Beta is .47, the estimated impact of the factor is about six times as great as when it is .08. Comparisons of that type cannot be made with unstandardized slopes. The tradeoff is that the literal meaning of standardized Betas is imprecise and difficult to describe in absolute terms.

*** This measure is closely associated with the quality outcome but is not tested as a key predictor because it is conceptualized as an outcome rather than a predictor of the quality judgment.

* Measures:

Market Tourism: Combination of Q4 (“marketing to attract tourists is a good investment for the community”) and Q13c (“how valuable a use of economic development funds is “developing and marketing tourism”). The result is an eight point scale.

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Each time a Beta (or slope) is listed, there is some unique and important impact of the factor in question; whenever no figures are listed, the estimated impact of the factor in question is zero. However, when the Beta is .47, the estimated impact of the factor is about six times as great as when it is .08. Comparisons of that type cannot be made with unstandardized slopes. The tradeoff is that the literal meaning of standardized Betas is imprecise and difficult to describe in absolute terms.

*** This measure is closely associated with the quality outcome but is not tested as a key predictor because it is conceptualized as an outcome rather than a predictor of the quality judgment.