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Thale Dillon

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**Exploring Tourism Development:  
Resident Attitudes in  
Custer County, MT**

**CTAP 2000-2001**

**Research Report 2001-3**

**March 2001**

# **Exploring Tourism Development: Resident Attitudes in Custer County, MT**

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## **EXECUTIVE SUMMARY**

This report presents information about tourism in Custer County, Montana. The report includes the results of a Custer County resident attitude survey, providing residents' opinions and attitudes regarding tourism and tourism development in the state and in the region, along with the results of a statewide survey for comparative purposes. The report also offers estimated travel volume and traveler characteristics for the county.

A mail-back questionnaire was administered to a randomly selected sample of 500 Custer County households during October and November 2000, and to a statewide sample of 1,145 Montana households during the same period. The survey sequence was initiated by mailing a pre-survey notice letter to all selected households. The survey mailing itself was followed by a reminder/thank-you postcard a week later. Two weeks after mailing the postcard, a replacement survey was sent to those households who had not yet responded.

### **NONRESIDENT VISITORS:**

- In 1999, nearly 3.9 million travel groups visited Montana. Of those, approximately 510,000 (13%) passed through Custer County.
- Close to \$1.59 billion was spent statewide in 1999 by nonresident travelers. This figure amounts to approximately \$1,760 for every Montana resident.
- In Custer County, nonresident visitors spent close to \$19.8 million, or about \$1,670 per county resident.
- Travelers to Custer County stayed in the state somewhat longer than statewide visitors.
- Travelers to Custer County reported that the best sources of travel information while in Montana were highway information signs.
- Forty-two percent were in Montana mainly because they were passing through on their way somewhere else, and 27 percent were in the state primarily for vacation.
- Vacationers in Custer County were attracted to Montana primarily because of Yellowstone National Park.
- Visitors to Custer County spent most of their money at gas stations and in restaurants/bars.
- Custer County visitors traveled mainly as couples, but also as families.
- Overnight visitors to Custer County were more likely than statewide visitors to stay in hotels or motels, but about equally likely to stay in the home of a friend or family member.

## **RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM:**

- Respondents from Custer County have resided on their community and in the state for a longer time than the statewide sample.
- Almost two-thirds of the Custer County sample are native Montanans.
- The majority of Custer County respondents feel tourism should have a role equal to other industries in the local economy, and ranked the tourism and recreation industry 5<sup>th</sup> on a list of desired economic development options.
- Most Custer County respondents work in places that supply little or none of their products or services to tourists or tourist businesses.
- Statewide respondents have a stronger attachment to their community than do Custer County respondents. Both groups are somewhat concerned about the future of their communities.
- Thirty-three percent of Custer County respondents feel that the population in the area is increasing, and that it is increasing at the right rate.
- Custer County respondents feel their quality of life can be enhanced by improving the condition of job opportunities, as well as road conditions, cost of living, local infrastructure and overall cleanliness and appearance.
- Custer County respondents largely agree that tourism will have a positive influence on museums and cultural centers, parks and recreation areas, and job opportunities.
- The respondents of Custer County are generally supportive of tourism development, more so than the statewide sample. Although few feel they will benefit personally from tourism, they agree that it will improve the quality of life for people in Montana.
- Seventy-four percent of Custer County respondents would support land-use regulation to control the type of future development in their community.
- Custer County respondents think there is adequate undeveloped open space in the county, and are not particularly concerned about its disappearance.
- Respondents feel strongly that any decision about tourism development should involve local residents and not be left entirely to the private sector.
- Overall economic benefit is perceived as the primary advantage of increased tourism in Custer County, while increased traffic, crime and crowding are seen as the leading disadvantages.

## **CONCERNS OF CUSTER COUNTY RESIDENTS:**

- Respondents identify the county's history as its primary strength as a tourist destination, while a lack of attractions was identified as the primary weakness.
- Building a convention center in Custer County is considered a good idea for attracting visitors.
- Advertising is considered to be the best way to capitalize on the upcoming Lewis and Clark Commemoration.

# TABLE OF CONTENTS

<b><u>EXECUTIVE SUMMARY</u></b> .....	<b>I</b>
<u>INTRODUCTION</u> .....	1
<b><u>SECTION 1: THE NONRESIDENT TRAVEL STUDY</u></b> .....	<b>3</b>
<u>METHODOLOGY</u> .....	3
<u>A PROFILE OF CURRENT SUMMER VISITORS</u> .....	4
<i>Group Characteristics</i> .....	4
<i>Information Sources</i> .....	6
<i>Purposes of Summer Trip</i> .....	8
<i>Montana Attractions</i> .....	9
<i>Visitor Activities</i> .....	10
<i>Economic Characteristics</i> .....	11
<b><u>SECTION II: THE RESIDENT ATTITUDE STUDY</u></b> .....	<b>13</b>
<u>METHODOLOGY</u> .....	13
<u>CUSTER COUNTY RESIDENTS' ATTITUDES</u> .....	14
<i>Respondent Characteristics</i> .....	14
<i>Tourism and the Economy</i> .....	18
<i>Dependence on Tourism</i> .....	18
<i>Interactions with Tourists</i> .....	19
<i>Community Attachment and Change</i> .....	20
<i>Current Conditions of and Tourism's Influence on Quality of Community Life</i> .....	22
<i>Index of Tourism Support</i> .....	24
<i>Index of Tourism Concern</i> .....	26
<i>Land Use Issues</i> .....	27
<i>Tourism-Related Decision-Making</i> .....	28
<i>Advantages and Disadvantages of Tourism Development</i> .....	28
<u>QUESTIONS SPECIFIC TO CUSTER COUNTY</u> .....	30
<i>Custer County Characteristics</i> .....	30
<i>Strengths and Weaknesses of Custer County as Tourist Destination</i> .....	32
<i>Tourism Development of Custer County Resources</i> .....	34
<i>Locally Suggested Attractions</i> .....	34
<i>Capitalizing on the Lewis and Clark Bicentennial Commemoration</i> .....	36
<u>GENERAL COMMENTS</u> .....	37
<b>Appendix A: Custer County Survey Instrument</b> .....	<b>39</b>





## LIST OF TABLES

<a href="#"><u>TABLE 1: SAMPLE SIZES AND RESPONSE RATES FOR THE 1996 SUMMER NONRESIDENT TRAVEL STUDY</u></a> .....	3
<a href="#"><u>TABLE 2: CHARACTERISTICS OF NONRESIDENT SUMMER VISITORS</u></a> .....	5
<a href="#"><u>TABLE 3: TOP FIVE STATES OF ORIGIN OF MONTANA NONRESIDENT SUMMER VISITORS</u></a> .....	6
<a href="#"><u>TABLE 4: SOURCES OF INFORMATION USED <i>PRIOR</i> TO VISIT TO MONTANA</u></a> .....	6
<a href="#"><u>TABLE 5: <i>MOST USEFUL</i> SOURCE OF INFORMATION USED <i>PRIOR</i> TO VISIT TO MONTANA</u></a> .....	7
<a href="#"><u>TABLE 6: SOURCES OF INFORMATION USED WHEN <i>IN</i> MONTANA</u></a> .....	7
<a href="#"><u>TABLE 7: <i>MOST USEFUL</i> SOURCE OF INFORMATION USED WHILE <i>IN</i> MONTANA</u></a> .....	7
<a href="#"><u>TABLE 8: REASONS FOR TRAVELING TO MONTANA</u></a> .....	8
<a href="#"><u>TABLE 9: ATTRACTIONS OF MONTANA AS A VACATION DESTINATION</u></a> .....	9
<a href="#"><u>TABLE 10: RECREATIONAL ACTIVITY PARTICIPATION</u></a> .....	10
<a href="#"><u>TABLE 11: EXPENDITURES BY NONRESIDENT TRAVELERS IN CUSTER COUNTY AND IN MONTANA</u></a> .....	11
<a href="#"><u>TABLE 12: SAMPLE SIZES AND RESPONSE RATES FOR 2000 RESIDENT ATTITUDE SURVEY</u></a> .....	13
<a href="#"><u>TABLE 13: AGE AND GENDER CHARACTERISTICS</u></a> .....	14
<a href="#"><u>TABLE 14: RESIDENCY CHARACTERISTICS</u></a> .....	15
<a href="#"><u>TABLE 15: COMMUNITY RESIDENCY</u></a> .....	15
<a href="#"><u>TABLE 16: SOURCE OF HOUSEHOLD INCOME</u></a> .....	16
<a href="#"><u>TABLE 17: SPECIFIC SERVICES AS SOURCE OF HOUSEHOLD INCOME</u></a> .....	16
<a href="#"><u>TABLE 18: PLACE OF RESIDENCE</u></a> .....	17
<a href="#"><u>TABLE 19: ROLE OF TOURISM IN THE LOCAL ECONOMY</u></a> .....	18
<a href="#"><u>TABLE 20: MOST DESIRED ECONOMIC DEVELOPMENT</u></a> .....	18
<a href="#"><u>TABLE 21: EMPLOYMENT'S DEPENDENCY ON TOURISTS FOR BUSINESS</u></a> .....	19
<a href="#"><u>TABLE 22: FREQUENCY OF CONTACT WITH TOURISTS VISITING COMMUNITY</u></a> .....	19
<a href="#"><u>TABLE 23: ATTITUDE TOWARDS TOURISTS VISITING COMMUNITY</u></a> .....	19
<a href="#"><u>TABLE 24: COMMUNITY ATTACHMENT STATEMENTS</u></a> .....	21
<a href="#"><u>TABLE 25: PERCEPTIONS OF POPULATION CHANGE</u></a> .....	21
<a href="#"><u>TABLE 26: RATE OF POPULATION CHANGE</u></a> .....	21
<a href="#"><u>TABLE 27: QUALITY OF LIFE—CURRENT CONDITION</u></a> .....	23
<a href="#"><u>TABLE 28: QUALITY OF LIFE—TOURISM'S INFLUENCE</u></a> .....	23
<a href="#"><u>TABLE 29: INDEX OF TOURISM SUPPORT</u></a> .....	25
<a href="#"><u>TABLE 30: INDEX OF TOURISM CONCERN</u></a> .....	26
<a href="#"><u>TABLE 31: LAND USE ISSUES</u></a> .....	27
<a href="#"><u>TABLE 32: TOURISM-RELATED DECISION-MAKING</u></a> .....	28
<a href="#"><u>TABLE 33: ADVANTAGES ASSOCIATED WITH INCREASED TOURISM</u></a> .....	29
<a href="#"><u>TABLE 34: DISADVANTAGE ASSOCIATED WITH INCREASED TOURISM</u></a> .....	29
<a href="#"><u>TABLE 36: VALUED CHARACTERISTICS OF CUSTER COUNTY</u></a> .....	30
<a href="#"><u>TABLE 37: CHARACTERISTICS MISSING FROM CUSTER COUNTY</u></a> .....	31
<a href="#"><u>TABLE 38: DISLIKED CHARACTERISTICS OF CUSTER COUNTY</u></a> .....	31
<a href="#"><u>TABLE 39: STRENGTHS OF CUSTER COUNTY AS A TOURIST DESTINATION</u></a> .....	32
<a href="#"><u>TABLE 40: WEAKNESSES OF CUSTER COUNTY AS A TOURIST DESTINATION</u></a> .....	33
<a href="#"><u>TABLE 41: POTENTIAL DEVELOPMENT OF CUSTER COUNTY RESOURCES</u></a> .....	34
<a href="#"><u>TABLE 42: LOCALLY RECOGNIZED ATTRACTIONS</u></a> .....	35
<a href="#"><u>TABLE 43: IDEAS TO CAPITALIZE ON L &amp; C COMMEMORATION</u></a> .....	36
<a href="#"><u>TABLE 44: GENERAL COMMENTS BY CUSTER COUNTY RESPONDENTS</u></a> .....	37



## **INTRODUCTION**

This research report is intended to provide a profile of current visitors to Custer County as well as resident attitudes regarding tourism and the travel industry in the county.

The results of two different studies were used in compiling this report. First, nonresident visitor profiles for Custer County and the state of Montana were developed using research conducted by ITRR during the summer of 1996. At that time, nonresident summer travelers to Montana were surveyed during a four-month study. A profile of Custer County visitors was developed from the subset of surveys submitted by nonresident travelers passing through the county. For comparative purposes, both statewide and Custer County visitor profiles are provided. Second, resident attitudes toward tourism and the travel industry were assessed using mail-back questionnaires obtained from households in Custer County as well as the state. Both surveys were conducted during October and November 2000 and the results are reported together to provide a comparison between resident opinions toward tourism in Custer County and in Montana as a whole.

The report is presented in two sections. The visitor profiles for Custer County and Montana can be found in the first section. Resident attitudes towards tourism and the travel industry in Custer County and in Montana are presented in section two.

Funding for this research came from the Lodging Facility Use Tax. Copies of this report can be downloaded from ITRR's web site ([www.forestry.umt.edu/itrr](http://www.forestry.umt.edu/itrr)) at no charge.



## SECTION 1: THE NONRESIDENT TRAVEL STUDY

Data collected for this section of the report comes from ITRR's 1996 Nonresident Summer Travel Study<sup>1</sup>.

### METHODOLOGY

Travelers to Montana during the summer season of 1996 (June 1-September 30) were intercepted for the Nonresident Travel Study. The traveler population was defined as those travelers entering Montana by private vehicle or commercial air carrier during the study period, and whose primary residence was not in Montana at the time. Specifically excluded from the study were those persons traveling in a plainly marked commercial or government vehicle such as a scheduled or chartered bus, or semi truck. Also excluded were those travelers who entered Montana by train. Other than these exclusions, the study attempted to assess all types of travel to the state.

Data was obtained through a mail-back diary questionnaire administered to a sample of intercepted travelers in the state. During the four-month study period, 12,941 groups were contacted. Usable questionnaires were returned by 5,800 groups, resulting in a response rate of 45 percent. A sample of 730 respondent groups traveled through Custer County in the summer of 1996 (Table 1).

**Table 1: Sample Sizes and Response Rates for the 1996 Summer Nonresident Travel Study**

	Statewide	Custer County
Nonresident groups contacted	12,941	
Usable questionnaires returned	5,800	
Nonresident Travel Study response rate	45%	
Custer County sample size		730
Percent of nonresident sample	100%	13%

<sup>1</sup> Parrish, J. N. Nickerson and K. McMahon. 1997. Nonresident Summer Travelers to Montana: Profiles and Characteristics. Research Report 51, Institute for Tourism and Recreation Research, School of Forestry, The University of Montana, Missoula, MT. 113pp.

## A PROFILE OF CURRENT SUMMER VISITORS

ITRR nonresident travel estimates report that approximately 2,273,000 groups, averaging 2.6 people per group, visited Montana during the 1999 summer season<sup>2</sup>. It was estimated that 13 percent, or 295,500, of those groups passed through Custer County, and that 21 percent of those who traveled through spent at least one night there.

### GROUP CHARACTERISTICS

Travel group characteristics for Custer County were obtained from visitors who spent at least one night in the area. There were some differences between the travel groups staying overnight in Custer County and the statewide sample (Table 2).

**Custer County:** The average group size for Montana visitors who spent at least one night in Custer County was 2.5. A full 90 percent of travelers had visited Montana before this trip. Most summer visitors to Custer County traveled as couples (45%), while 29 percent traveled with family. The largest portion of males were between 50 and 64 years of age (33%), as was the largest portion of females (31%). The majority of summer visitors chose to spend their nights in a hotel or a motel (68%), and stayed an average of 5 nights.

**Statewide:** For travelers to the state, the average group size was 2.6, a fraction larger than for Custer County visitors. Seventy-seven percent were repeat visitors, and most traveled as couples (38%), with almost as many traveling as family (34%). The largest portion of the statewide male visitor population was between 30 and 49 years of age (31%), as was the case for females (33%). A typical visitor to Montana spent 3 nights in the state, and was also most likely to stay in a hotel or a motel (59%).

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<sup>2</sup> The total number of travelers is estimated each year, while the profile of visitors is only re-evaluated every few years. Therefore, this report presents traveler characteristics that are estimated from data collected in the summer of 1996, applied to the estimated number of travelers and their total economic impacts for 1999. At the time this report was written, travel volume for the year 2000 was still preliminary. For this reason, nonresident travel volume and economic impact estimates are for 1999.

**Table 2: Characteristics of Nonresident Summer Visitors**

	<b>Custer County*</b>	<b>Statewide</b>
<b>Group Type</b>		
Couple	45%	38%
Family	29%	34%
Alone	16%	17%
Friends	5%	7%
Family & friends	4%	3%
Business associates	1%	1%
Group or club	--	--
<b>Group Size</b>	2.5	2.6
<b>Have previously visited Montana</b>	90%	77%
<b>Nights spent in Montana</b>	5.0	3.5
<b>Accommodations used in Montana**</b>		
Home of friend or relative	22%	21%
Hotel or motel	68%	59%
Private campground	25%	18%
Public campground	10%	16%
Undeveloped campground	3%	4%
Resort or guest ranch	4%	5%
Condominium	1%	1%
Other	2%	5%
<b>Age of Males</b>		
Under 18 years old	16%	19%
18-29 years old	7%	10%
30-49 years old	28%	31%
50-64 years old	33%	24%
65 and older	16%	16%
<b>Age of Females</b>		
Under 18 years old	16%	18%
18-29 years old	9%	10%
30-49 years old	30%	33%
50-64 years old	31%	25%
65 and older	14%	14%

Source: ITRR

\* Characteristics of Montana visitors who stayed at least one night in Custer County.

\*\* Percentages do not add to 100 because respondents could indicate more than one response category.

Visitors to the state as well as to Custer County were from a variety of origins. While Washington and California figure prominently on both lists, visitors to Custer County were more likely than the statewide sample to come from Minnesota, North Dakota or Oregon. On the other hand, statewide visitors were more likely to be from Idaho, Wyoming or Colorado (Table 3).

**Table 3: Top Five States of Origin of Montana Nonresident Summer Visitors**

Rank*	Custer County**	Statewide
1	Minnesota	Washington
2	Washington	California
3	North Dakota	Idaho
4	California	Wyoming
5	Oregon	Colorado

Source: ITRR

\* 1=highest frequency

\*\* Characteristics of Montana visitors who stayed at least one night in Custer County.

## INFORMATION SOURCES

Nonresident travel groups indicated which information sources were used as planning tools for their trip *prior* to arriving in Montana, as well as *while* they were in Montana. Also, respondents indicated which of the sources were most useful to them. A list of 11 information sources was included in the questionnaire (Tables 4, 5, 6 and 7).

**Custer County:** Thirty-eight percent of visitors to Custer County did not use any of the listed sources prior to their trip. The three most frequently used sources of travel information were AAA (36%), travel guide books (19%) and the National Park brochures (14%). The *most useful* sources of travel information used prior to arriving in Montana were also AAA (45%), travel guide books (19%) and National Park brochures (12%).

**Statewide:** Forty percent of statewide visitors did not use any of the 11 listed information sources prior to travel. However, 31 percent used AAA, 22 percent used travel guide books and 20 percent used the Montana Travel Planner. The *most useful* sources of information used prior to travel included AAA (39%), travel guide books (19%) and National Park brochures (12%).

**Table 4: Sources of Information Used *Prior* to Visit to Montana**

	Custer County*	Statewide*
None of the sources	38%	40%
AAA	36%	31%
Travel guide book	19%	22%
National Park brochure	14%	13%
Montana Travel Planner	10%	20%
1-800 State travel number	8%	7%
Information from private businesses	8%	7%
Chamber or visitor bureau	7%	7%
State Park brochure	3%	5%
Internet travel information	1%	4%
Regional travel number	--	1%
Attending travel trade show	--	--

Source: ITRR

\* Visitors could indicate more than one information source.



**Table 5: Most Useful Source of Information Used Prior to Visit to Montana**

	Custer County*	Statewide*
AAA	45%	39%
Travel guide book	19%	19%
National Park brochure	12%	12%
Information from private businesses	8%	6%
1-800 State travel number	7%	4%
Chamber or visitor bureau	4%	5%
Montana Travel Planner	3%	11%
State Park brochure	--	3%
Internet travel information	--	1%
Regional travel number	--	--
Attending travel trade show	--	--

Source: ITRR

\* Percentages may not add to 100 due to rounding.

**Custer County:** Visitors were also asked where they received travel information while *in* Montana. For overnight visitors to Custer County, the travel information sources used the most frequently were highway information signs (40%), persons in motels, restaurants, gas stations, etc. (32%) and brochure racks (27%). Visitors then indicated what source was the *most* useful while traveling *in* Montana. Twenty-six percent of respondents stated that highway information signs were most helpful, followed by persons in motels, restaurants, gas station, etc. (20%).

**Statewide:** Thirty-five percent of statewide visitors indicated that while *in* Montana, they obtained travel information from persons in motels, restaurants, gas stations, etc. Other prominent information sources were highway information signs (33%) and brochure racks (26%). Of the information sources used while *in* Montana, statewide visitors indicated that the *most* useful were persons in motels, restaurants, gas stations, etc. (24%), followed closely by persons in visitor information centers (22%).

**Table 6: Sources of Information Used When *in* Montana**

	Custer County*	Statewide*
Highway information signs	40%	33%
Person in motel, restaurant, gas station, etc.	32%	35%
Brochure rack	27%	26%
Person in visitor information center	22%	24%
Other	19%	18%
Business billboards	11%	10%
Computer touch-screen info center	1%	--

Source: ITRR

\*Visitors could indicate more than one information source.

**Table 7: Most Useful Source of Information Used While *in* Montana**

	Custer County*	Statewide*
Highway information signs	26%	19%
Person in motel, restaurant, gas station, etc.	20%	24%
Brochure rack	18%	15%
Person in visitor information center	18%	22%
Other	17%	18%
Business billboards	1%	2%
Computer touch-screen info center	--	--

Source: ITRR

\*Percentages may not add to 100 due to rounding.

## PURPOSES OF SUMMER TRIP

Nonresident travel groups were asked their reasons for traveling to Montana. Many visitors had more than one reason, and were thus asked to identify their *primary* reason for coming to the state as well (Table 8).

**Custer County:** Two-thirds of Custer County visitors indicated that vacation was one reason for traveling to Montana. Other frequently cited reasons included passing through the state (52%) and visiting family or friends (38%).

With respect to Custer County overnight visitors' *primary* reason for visiting the state, nearly half (42%) were in Montana on their way to somewhere else, i.e. just passing through. Other common *primary* reasons included vacation (27%) and visiting family or friends (19%). With such a large portion of visitors driving through the county on their way to somewhere else, providing opportunities for drive breaks could be a way to capture a larger share of these travelers. Marketing to those who are in the area to visit family or friends could also be beneficial.

**Statewide:** Over three-fourths of statewide visitors cited vacation as one reason for their trip to Montana. Also frequently mentioned were visiting family or friends (31%) and passing through (31%).

Statewide travelers most frequently cited vacation as their *primary* reason for visiting Montana (49%). Passing through the state (21%) and visiting family or friends (16%) were also indicated as *primary* reasons.

**Table 8: Reasons for Traveling to Montana**

	Custer County		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	66%	27%	77%	49%
Passing through	52%	42%	31%	21%
Visit family or friends	38%	19%	31%	16%
Business	7%	4%	10%	6%
Recreational shopping	6%	4%	9%	1%
Necessity shopping	4%	-	4%	1%
Other	6%	4%	4%	3%
Medical	3%	3%	3%	2%
Convention or meeting	3%	1%	2%	1%

Source: ITRR

\* Visitors could indicate more than one reason.

\*\* Percentages may not add to 100 due to rounding.

## MONTANA ATTRACTIONS

Respondents who indicated that one purpose for their trip was vacation were asked what attracted them to Montana as a vacation destination. They were asked to check *all* pertinent attractions, and then indicate one *primary* attraction (Table 9).

**Custer County:** Many Custer County vacationers were attracted by more than one of the state's many features. The top five Montana attractions were the mountains (43%), rivers (26%), open space (26%), uncrowded areas (24%) and Yellowstone National Park (22%). Yellowstone National Park (18%) was the most popular *primary* attraction for Custer County overnight visitors, closely followed by Glacier National Park (17%) and the mountains (17%).

**Statewide:** Statewide visitors were also attracted to Montana for many reasons. The top attractions to Montana included the mountains (51%), Yellowstone National Park (39%), the rivers (35%), Glacier National Park (31%) and open space (31%). The most frequently cited *primary* Montana attractions for statewide visitors were Glacier National Park (24%) and Yellowstone National Park (21%).

**Table 9: Attractions of Montana as a Vacation Destination**

	Custer County		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
Mountains	43%	17%	51%	12%
Yellowstone National Park	22%	18%	39%	21%
Rivers	26%	1%	35%	1%
Glacier National Park	19%	17%	31%	24%
Open Space	26%	12%	31%	6%
Wildlife viewing	17%	--	28%	2%
Uncrowded areas	24%	4%	27%	4%
Lakes	18%	1%	26%	1%
Camping	15%	4%	19%	2%
Friendly people	20%	5%	18%	3%
National forests	12%	1%	15%	1%
Hiking	4%	--	15%	1%
Fishing	11%	7%	14%	6%
Historic sites	13%	4%	13%	2%
Montana history	14%	--	11%	1%
Native American Culture	9%	1%	10%	1%
Special attractions	--	5%	8%	6%
Wilderness areas	4%	--	5%	1%
Northern Great Plains	7%	--	6%	--
Badlands	11%	2%	6%	1%
State parks	7%	--	6%	--
Special events	4%	1%	4%	4%

Source: ITRR

\* Visitors could indicate more than one attraction.

\*\* Percentages may not add to 100 due to rounding.

## VISITOR ACTIVITIES

Some differences can be seen among the activities participated in by statewide visitors and by overnight visitors to Custer County (Table 10).

**Custer County:** Visiting family or friends was the most popular activity among those visitors spending a night in Custer County (33%). Other popular activities included wildlife watching (26%), developed-area camping (24%) and visiting historic/interpretive sites (23%). The latter is good news in light of Custer County's extensive historic background and well-preserved historic district in downtown Miles City.

**Statewide:** For all visitors to the state, wildlife viewing topped the list of recreational activities (45%). Visiting family or friends (34%) was popular as well, as was nature photography (33%) and recreational shopping (32%).

**Table 10: Recreational Activity Participation**

	Custer County*	Statewide*
Visiting family or friends	33%	34%
Wildlife watching	26%	45%
Camping (developed area)	24%	28%
Historic/interpretive sites	23%	29%
Recreational shopping	21%	32%
Nature photography	19%	33%
Visiting museums	17%	21%
Swimming (in pools)	17%	14%
Picnicking	16%	26%
Gambling	14%	10%
Day hiking	11%	29%
Camping (primitive areas)	8%	10%
Visiting Native American sites	8%	10%
Fishing	7%	15%
Special event/Festivals	6%	8%
Golfing	5%	5%
Swimming (natural areas)	4%	7%
River floating/rafting	3%	6%
Nature studies	0%	9%

Source: ITRR

\* Visitors could indicate more than one activity.

## ECONOMIC CHARACTERISTICS

Information about the number of visitors to an area and how much they spend during their visit there is useful for planning purposes. While travel group characteristics are based only on groups who spent a night in Custer County during the summer, economic information is more inclusive and represents all groups who spent money in the county throughout the entire year (Table 11).

ITRR staff estimated that 3,898,000 travel groups visited Montana in 1999. Of those nearly 3.9 million groups, approximately 510,000 (13%) passed through Custer County.

**Custer County:** Nonresident spending in Custer County was near \$19.8 million in 1999, or about 1.2 percent of all nonresident spending in Montana. Nonresidents spent the equivalent of \$1,670 per County resident.

**Statewide:** Nonresident visitors spent close to \$1.6 billion in the state in 1999. This amounted to about \$1,760 per state resident.

**Table 11: Expenditures by Nonresident Travelers in Custer County and in Montana**

Distribution of Expenditures	Custer County	Statewide
Lodging, campgrounds, etc.	20%	17%
Auto rental and repair, transportation	1%	4%
Gas and oil	31%	22%
Restaurant, bar	28%	18%
Groceries, snacks	8%	8%
Retail sales	9%	24%
Miscellaneous services	2%	6%
Total travel groups to sample area, 1999	510,000	3,898,000
Total expenditures in sample area, 1999 (1999\$)	\$19,770,000	\$1,589,000,000
Per capita expenditures in sample area, 1999 (1999\$)	\$1,670	\$1,760

Source: ITRR, Montana Census and Economic Information Center<sup>3</sup>.

<sup>3</sup> MT Department of Commerce, Census and Economic Information Center. Data sets CO-99-8 "Montana Estimates of the Population of Montana and Counties: Annual Time Series", accessed at [ceic.commerce.state.mt.us/Demog/estimate/pop/County/cty99allrank](http://ceic.commerce.state.mt.us/Demog/estimate/pop/County/cty99allrank), and "April 1, 2000 Resident Population Data", accesses at [ceic.commerce.state.mt.us/C2000/c2000data/tab02](http://ceic.commerce.state.mt.us/C2000/c2000data/tab02).



## SECTION II: THE RESIDENT ATTITUDE STUDY

Data for this section of the report came from the ITRR Resident Attitude Study conducted in Custer County in October and November 2000. A copy of the survey instrument can be found in Appendix A.

### METHODOLOGY

A mail-back questionnaire was administered to a sample of Custer County residents, as well as to a sample of statewide residents in the fall of 2000. The distribution followed an updated version of Dillman's Total Design Method (TDM)<sup>4</sup>, but differs only slightly from previous ITRR resident attitude surveys. It is believed that these updates to the survey instrument and mailing sequence helped improve the study's response rate, which has dwindled in recent years. This year, the rate for both samples was close to or exceeded 40 percent.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a selected sample of 500 Custer County households, as well 1,145 Montana households. This letter informed recipients of the upcoming survey and alerted them to the appearance of a questionnaire in their mailbox in the near future. Shortly thereafter, a questionnaire was mailed to the same households, along with a cover letter stating in more detail the purpose and nature of the study. For the sake of random selection, this letter also requested that the adult with the most recent birthday be the one to complete the questionnaire.

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

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

The reader is cautioned to bear in mind that the results presented are the opinions of only 38 percent of the Custer County residents polled (Table 12). It is assumed that respondents did not differ from non-respondents in their opinions. Because the age distribution of the survey respondents differed from the July 1, 1999, Montana census estimates of age groups<sup>5</sup>, responses were weighted to more closely reflect the population of Custer County. The results presented in this report reflect the adjusted dataset.

**Table 12: Sample Sizes and Response Rates for 2000 Resident Attitude Survey**

	Custer County	Statewide
Resident questionnaires mailed out	500	1,145
Undeliverables	105	188
Usable resident questionnaires returned	152	401
Resident Attitude Study response rate	38%	42%

<sup>4</sup> Dillman, Don A. 2000. *Mail and Internet Surveys: The Total Design Method*. John Wiley & Sons, Inc. New York, NY.

<sup>5</sup> MT Department of Commerce, Census and Economic Information Center. Data set CO-99-13 "Population estimates for counties by age group: July 1, 1999". Accessed at [ceic.commerce.state.mt.us/Demog/estimate/pop/County/mcty99agegroup](http://ceic.commerce.state.mt.us/Demog/estimate/pop/County/mcty99agegroup).

## CUSTER COUNTY RESIDENTS' ATTITUDES

As a community pursues tourism as a development strategy, the goals of that effort generally include an improved economy, more jobs for local residents, community stability, and ultimately, a stable or improved quality of life for the community's residents. Understanding residents' perceptions of the conditions of their surroundings and tourism's influence on those conditions can provide guidance toward appropriate development decisions.

Residents of an area may hold a variety of opinions about tourism and other forms of economic development. They may have both positive and negative perceptions of the specific effects of tourism. Attitudes and opinions are good measures for determining the level of support for community and industry actions. The resident opinion questionnaire addressed topics that provide a picture of perceived current conditions and tourism's role in the community.

## RESPONDENT CHARACTERISTICS

Age and gender, as well as length of residency in Custer County and in the state were explored in the respondent characteristics section of the survey.

**Age and gender:** Respondents were asked to indicate their gender as well as their age (Table 13).

**Custer County:** Forty-seven percent of respondents to the Custer County survey were male, compared to the actual ratio for Custer County of 49 percent. The average age was 49 years, and respondents ranged in age from 18 to 89 years.

**Statewide:** Of respondents to the statewide survey, 48 percent were male, compared to the actual statewide ratio of 50 percent. The average age was 52 years, with the age range spanning 18 to 89 years.

**Table 13: Age and Gender Characteristics**

	Custer County	Statewide
Average age	49 years	52 years
Minimum age	18 years	18 years
Maximum age	89 years	89 years
Percent male	47%	48%
Percent female	53%	52%

**Residence:** Survey subjects were asked if they were born in Montana, as well as how long they had lived in their state and in their community. Custer County respondents were asked how long they had lived in their county (Tables 14 and 15).

**Custer County:** Almost two-thirds of Custer County respondents were native Montanans. On average, they had lived in the county for 28 years, and in the state for 39 years. They had lived in the county for 57 percent of their lives, and in Montana for eighty percent of their lives. Twenty-three percent of respondents had lived in Custer County longer than 40 years, while 22 percent had lived there 10 years or less.

**Statewide:** A little over half of statewide respondents were born in Montana. On average, they had lived in the state for 33 years, or 70 percent of their lives, and in their community for 24 years, or 51 percent of their lives. Twenty percent had lived in their community longer than 40 years, while a full 32 percent had lived there for less than 10 years.



**Table 14: Residency Characteristics**

	<b>Custer County</b>	<b>Statewide</b>
Born in Montana	61%	52%
Mean years lived in community	28 years	24 years
Mean years lived in Montana	39 years	33 years
Age (mean years)	49 years	47 years
Percentage of life spent in community	57%	51%
Percentage of life spent in state	80%	70%

**Table 15: Community Residency**

	<b>Custer County</b>	<b>Statewide</b>
10 years or less	22%	32%
11 to 20 years	15%	17%
21 to 30 years	26%	20%
31 to 40 years	14%	11%
41 to 50 years	10%	7%
51 to 60 years	8%	8%
61 years or more	5%	5%

**Employment Status:** A person's employment status, type of job and sector of employment can all influence support for tourism development. In general, the more dependent a person is financially on the travel industry, the greater the support for tourism (Table 16 and 17).

**Custer County:** Respondents to the Custer County resident attitude survey overwhelmingly derived their income from the government sector (50%). Another large source of household income was mining (28%), although there is no mining industry in Custer County itself. Neighboring Rosebud County has considerable coal mining activity, and it is natural to assume that the Colstrip mine employs a fair share of Custer County residents. Other sizeable income sources were agriculture (18%), wholesale/retail trade (14%) and construction (11%). Less than one percent of respondents indicated that they were employed in the travel industry. However, employees in the service sector may unknowingly be part of the Montana travel industry.

**Statewide:** Statewide respondents derived most of their household income from the service sector (28%). Other sources of household income included government (16%), wholesale/retail trade (14%) and agriculture (14%). Approximately four percent of statewide household derived some portion of their household income from the travel industry. As may be the case for Custer County, some of the statewide respondents who indicated that they are employed in the service sector may in fact be part of the travel industry.

**Table 16: Source of Household Income**

Sector	Percent of households deriving income from sector*	
	Custer County	Statewide
Government	50%	16%
Mining	28%	2%
Wholesale or retail trade	14%	14%
Agriculture	18%	14%
Construction	11%	12%
Forestry	9%	3%
Finance, Insurance or Real Estate (FIRE)	9%	8%
Transportation, Communication or Utilities	3%	7%
Services	1%	28%
Manufacturing	<1%	5%
Travel industry	<1%	4%

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

**Table 17: Specific Services as Source of Household Income**

Service Sector	Custer County	Statewide
Laundry services	3%	2%
Health care/Medical care/Social work	45%	28%
Education/Daycare	13%	28%
Professional services	8%	9%
Restaurant/bar*	8%	6%
Auto repair	5%	4%
Hotel industry	--	2%
Heating/Air/Plumbing	--	3%
Welding/construction/oil drilling	3%	3%
Garbage	--	1%
Janitor/maid	5%	3%
Outfitter/guide	2%	--
Religious services	--	2%
Fitness	--	1%
Home repair/carpentry	--	3%
Computer services	--	1%
Media	3%	3%
Hair stylist/cosmetologist	5%	1%
<b>Total respondents</b>	<b>36</b>	<b>114</b>

\* The "Restaurant/bar" category does not technically belong in the Service sector according to the Standard Industrial Classification index. It is part of the Wholesale/Retail Trade sector in Table 16 as "Eating and Drinking Places". However, it is a common belief that it is a part of the service sector and it is therefore included here.

**Place of Residence:** Respondents were asked to indicate if they lived in town (urban setting) or out of town (rural setting) (Table 18).

**Custer County:** Eighty-seven percent of Custer County residents indicated that they lived in town. Residents from rural areas made up 13 percent of the respondents. This may seem surprising in a rural county such as Custer. However, the majority of the county’s population is concentrated in Miles City, explaining why this ratio of in-town to out-of-town dwellers differs so widely from the statewide distribution.

**Statewide:** Over half of statewide respondents indicated that they live in town, leaving 42 percent who consider their residence to be rural.

**Table 18: Place of Residence**

	<b>Custer County</b>	<b>Statewide</b>
In town (urban setting)	87%	58%
Out of town (rural setting)	13%	42%

## TOURISM AND THE ECONOMY

The local economy and the role tourism and the travel industry should have in it were key issues addressed in the survey. Residents were asked how important a role they felt tourism should have in their community's economy. In addition, they ranked industries on a scale from 1 (most desired) through 7 (least desired) indicating which they felt would be most desirable for their community (Tables 19 and 20).

**Custer County:** The majority (68%) of Custer County respondents believe that the travel industry should have a role equal to other industries in the county economy, while 15 percent feel it should have a dominant role. Tourism/recreation ranked fifth behind agriculture/agribusiness, retail/wholesale trade, services and manufacturing as the most desired economic development opportunity for the county.

**Statewide:** Fifty-seven percent of statewide respondents feel that tourism should have a role equal to other industries in their local economy. Twenty-three percent believe the industry should have a minor role. When ranking tourism along with other industry segments according to economic desirability for their community, it placed fifth, behind services, agriculture/agribusiness, retail/wholesale trade and manufacturing.

**Table 19: Role of Tourism in the Local Economy**

	Custer County	Statewide
No role	--	5%
A minor role	17%	23%
A role equal to other industries	68%	57%
A dominant	15%	15%

**Table 20: Most Desired Economic Development**

	Custer County		Statewide	
	Rank	Mean*	Rank	Mean*
Agriculture/Agribusiness	1	2.16	2	3.00
Retail/Wholesale trade	2	2.99	3	3.12
Services	3	3.26	1	2.84
Manufacturing	4	3.70	4	3.87
<b>Tourism/Recreation</b>	5	3.93	5	3.99
Wood products	6	5.52	6	4.78
Mining	7	6.15	7	5.82

\* Scores represent the mean of responses measured on a scale from 1 (most desired) to 7 (least desired).

## DEPENDENCE ON TOURISM

Respondents were asked about the degree to which their place of work relied on tourists for its business (Table 21).

**Custer County:** A full 15 percent of Custer County respondents indicated that their place of employment provides a majority of their products or services to tourists or tourist businesses. Forty-one percent work in places that provide none of their products or services to tourists or tourist businesses.

**Statewide:** Only 6 percent of statewide respondents work in places that provide a majority of their products or services to tourists or tourist businesses, whereas the majority is employed in places that provide none of their products or services to tourists or tourist businesses.

**Table 21: Employment's Dependency on Tourists for Business**

	Custer County	Statewide
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	15%	6%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	44%	40%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	41%	54%

## INTERACTIONS WITH TOURISTS

The extent of interaction between tourists and residents affects the attitudes and opinions residents hold toward tourism in general. In turn, an individual's behavior is a reflection of those same attitudes and opinions. Respondents were asked questions to determine the extent to which they interact with tourists on a day-to-day basis as well as the quality of those interactions (Tables 22 and 23).

**Custer County:** When asked about the frequency of their interactions with tourists, only 9 percent indicated that they have frequent contact. Over one-third reported that they have infrequent contact with tourists visiting Custer County. Although the frequency of interaction is low, the vast majority (79%) of Custer County residents enjoy meeting and interacting with tourists when the occasion arises. Only 1 percent of respondents do not enjoy meeting and interacting with visiting tourists.

**Statewide:** Fourteen percent of statewide respondents reported having frequent contact with tourists visiting their community. Twenty-three percent indicated that they have somewhat frequent contact with tourists, and 36 percent said they have infrequent contact. Almost two-thirds of statewide respondents (65%) reported that they enjoy meeting and interacting with tourists. Twenty-eight percent are neutral to meeting and interacting with tourists, while 7 percent do not enjoy these interactions.

**Table 22: Frequency of Contact with Tourists Visiting Community**

Degree of Frequency	Custer County	Statewide
Frequent contact	9%	14%
Somewhat frequent contact	27%	23%
Somewhat infrequent contact	26%	27%
Infrequent contact	38%	36%

**Table 23: Attitude Towards Tourists Visiting Community**

Attitude	Custer County	Statewide
Enjoy meeting and interacting with tourists	79%	65%
Indifferent about meeting and interacting with tourists	20%	28%
Do not enjoy meeting and interacting with tourists	1%	7%

## COMMUNITY ATTACHMENT AND CHANGE

One measure of community attachment is the length of time and portion of life spent in a community or area. These statistics were reported earlier in the report (Table 14). Another measure is based on opinions that residents have about their community and perceived changes in population levels (Tables 24 and 25).

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

**Custer County:** The Index of Community Attachment (i.e. the mean of four community attachment statements) indicates that Custer County respondents are indeed attached to their community. An average rating of 2.9 shows these people like where they live. They were very positive in their feelings about their community, except in regard to opinions about the future. At 2.5, this item received a borderline score, indicating that residents have less confidence when it comes to the future of Custer County.

Residents were asked whether they perceive the population of Custer County to be changing and if so, how the change is occurring and at what rate. Close to half of respondents (46%) feel that the county's population is not changing at all, while one-third feel it is increasing and another 21 percent feel it is decreasing. Of those who feel the county's population is increasing, 56 percent feel it is increasing at the right rate. Only 13 percent feel it is increasing too fast. Of those who feel the population of Custer County to be decreasing, over half (57%) feel it is decreasing too fast, while 10 percent feel it is decreasing too slowly.

**Statewide:** For respondents to the statewide survey, the Community Attachment Index produced a score of 3.1, higher than that of Custer County. It is safe to say that Montana residents, in general, are attached to their communities. However, as was the case with Custer County respondents, statewide respondents also rated the future of their community lower than the other items in the index. With a score of 2.6, it is barely positive.

On the statewide level, a mere 16 percent of respondents feel that the population of their community is unchanging. Sixty-three percent feel population is increasing, while 21 percent feel it is decreasing. Of those who indicated that the population of their community is increasing, about half (51%) feel this is happening at the right rate. However, a full 45 percent feel this increase is occurring too fast. Of those who indicated that the population of their community is decreasing, the vast majority (89%) feels it is decreasing too fast. Eight percent are happy with the perceived rate of decrease, while 3 percent feel the rate of decrease is too slow.

**Table 24: Community Attachment Statements**

	<b>Custer County Mean*</b>	<b>Statewide Mean*</b>
I'd rather live in my community than anywhere else.	2.9	3.1
If I had to move away from my community, I would be very sorry to leave.	3.0	3.1
I think the future of my community looks bright.	2.5	2.6
It is important that the residents of my community be involved in decisions about tourism.	3.3	3.4
<b>Index of Community Attachment**</b>	<b>2.9</b>	<b>3.1</b>

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

\*\* Index score is the mean of the mean scores for the four community attachment statements.

**Table 25: Perceptions of Population Change**

	<b>Custer County*</b>	<b>Statewide*</b>
Population is not changing	46%	16%
Population is increasing	33%	63%
Population is decreasing	21%	21%

\*The population of Custer County increased by 1.2% between 1990 and 1999, and that of the state of Montana increased by 10.0% over the same time period.

**Table 26: Rate of Population Change**

	<b>Custer County</b>	<b>Statewide</b>
<b>If you feel the population in your community is increasing, how would you describe the change?</b>		
Population is increasing too fast	13%	45%
Population is increasing at the right rate	56%	51%
Population is increasing too slowly	31%	4%
<b>If you feel the population in your community is decreasing, how would you describe the change?</b>		
Population is decreasing too fast	57%	89%
Population is decreasing at the right rate	33%	8%
Population is decreasing too slowly	10%	3%

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

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

To that end, respondents were asked to rate the current condition of a number of factors that influence their quality of life using a five-point scale ranging from 1 (very poor condition) to 4 (very good condition), in addition to a "Don't Know" option. They were also asked to rate the influence they thought increased tourism would have on these factors using a scale including "Positive influence", "Both positive and negative influence", "Negative influence", "No influence" and "Don't know" (Tables 27 and 28).

**Custer County:** Custer County respondents indicated that they are very satisfied with quality of life variables in their community. The items receiving the most favorable ratings are emergency services, level of traffic congestion, overall community livability, and museums and cultural centers. Of these top items, emergency services and museums and cultural centers are expected to be mostly positively influenced by increased tourism activity, whereas traffic congestion is expected to be negatively influenced. Tourism is expected to have both positive and negative influence on overall community livability.

The only item that was rated as being in less than good condition was job opportunities. However, the majority of respondents (62%) indicated that they expect increased tourism development to have a positive influence on this variable.

Tourism is also expected to have positive influence on parks and recreation areas, as well as road and highway conditions. Tourism is expected to have no influence on the education system or local infrastructure.

**Statewide:** Overall, statewide respondents were less satisfied with the current condition of quality of life than Custer County respondents. However, their ratings are similar, with emergency services receiving the most favorable score, and job opportunities the least favorable one.

Just as their Custer County counterparts, statewide respondents expect tourism development to have a positive impact on museums and cultural centers, as well as on parks and recreation areas and job opportunities. Negative influence is expected for the level of traffic congestion.

Statewide respondents indicated that they expect increased tourism to have both positive and negative impacts on most quality of life variables, including emergency services, community livability, safety from crime, cleanliness and appearance, local infrastructure, cost of living, and road and highway conditions.



**Table 27: Quality of Life—Current Condition**

	<b>Custer County Mean*</b>	<b>Statewide Mean*</b>
Emergency services	3.31	3.15
Traffic congestion	3.23	2.84
Overall community livability	3.23	3.24
Museums and cultural centers	3.14	3.02
Education system	3.05	2.98
Safety from crime	3.03	3.07
Parks and recreation areas	3.01	3.12
Overall cleanliness and appearance	2.88	3.01
Infrastructure	2.81	2.75
Cost of living	2.75	2.29
Conditions of roads and highways	2.60	2.51
Job opportunities	1.82	1.96

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

**Table 28: Quality of Life—Tourism's Influence**

	<b>Custer County</b>					<i>Statewide</i>				
	<b>No Influence</b>	<b>Negative Influence</b>	<b>Positive &amp; Negative Influence</b>	<b>Positive Influence</b>	<b>Don't Know</b>	<i>No Influence</i>	<i>Negative Influence</i>	<i>Positive &amp; Negative Influence</i>	<i>Positive Influence</i>	<i>Don't Know</i>
Emergency services	19%	4%	33%	34%	10%	17%	13%	38%	18%	14%
Traffic congestion	10%	40%	22%	23%	5%	7%	54%	25%	9%	5%
Overall community livability	16%	5%	41%	34%	4%	13%	13%	42%	23%	9%
Museums and cultural centers	1%	3%	6%	89%	1%	8%	2%	13%	70%	7%
Education system	40%	6%	16%	30%	8%	40%	8%	21%	19%	12%
Safety from crime	13%	17%	42%	19%	9%	13%	28%	40%	10%	9%
Parks and recreation areas	7%	7%	27%	55%	4%	6%	14%	32%	43%	5%
Overall cleanliness and appearance	10%	13%	39%	33%	5%	9%	20%	40%	23%	8%
Infrastructure	30%	11%	27%	23%	9%	26%	18%	28%	12%	16%
Cost of living	18%	15%	29%	25%	13%	13%	26%	30%	17%	14%
Conditions of roads and highways	12%	15%	28%	37%	8%	6%	29%	34%	25%	6%
Job opportunities	10%	7%	16%	62%	5%	10%	8%	25%	51%	6%

In addition to tourism's perceived influence on well-being, another method of measuring the degree of support for the travel industry is to ask respondents questions specific to the tourism industry and about interactions with tourists. Respondents were asked to indicate their level of agreement or disagreement with a number of tourism-related statements. Responses ranged from 1 (strongly disagree) to 4 (strongly agree). As before, a score of 2.5 or more indicates agreement, while a score of less than 2.5 indicates disagreement. The statements deal with issues such as tourism support, tourism concerns, and land use issues.

## INDEX OF TOURISM SUPPORT

Some statements addressed general support for tourism development while others addressed more specific aspects of tourism (Table 29).

**Custer County:** Almost all (95%) of Custer County respondents agree that tourism promotion and advertising to out-of-state visitors by the state of Montana is a good idea, and would like to see this continued. A full eighty-one percent feel that their community is a good place for tourism investment, while ninety percent indicated that they believe increased tourism will help their community grow in the right direction. Eighty-five percent of respondents also feel that any negative impacts of tourism are outweighed by its benefits. The majority (83%) of Custer County respondents feel that tourism promotion by the state benefits the county economically, while over two-thirds (68%) believe that jobs in the travel industry offer opportunities for advancement. Almost as many (66%) feel that overall quality of life for Montana residents will improve with increased tourism. On the downside, a majority of respondents (62%) do not see a connection between increased tourism in the community and a more secure income for themselves, just as (64%) do not think that increased tourism will lead to any financial benefit on their part.

Despite the apparent lack of personal economic benefit to respondents in Custer County, they still support tourism development in the area because they feel it will benefit their community. The Index of Tourism Support, i.e. the mean of the average score for each statement, equals 2.8, considerably higher than the neutral point of 2.5. Clearly, there is considerable support for the travel industry in the county, a support that is obvious despite the perceived lack of personal benefit to people.

**Statewide:** On the whole, statewide respondents are less supportive of tourism and the travel industry than Custer County respondents. The average score for each statement is consistently lower for statewide respondents than it was for Custer County respondents. However, there is still an overall positive sentiment regarding tourism development. Seventy-six percent support continued tourism promotion and advertisement to out-of-state visitors, while two-thirds (66%) agree that their community is a good place to invest in tourism development. Sixty percent think that increased tourism in the state will help their community grow in the right direction, and a full 69 percent feel that the overall benefits of tourism outweigh any negative impacts. Tourism promotion by the state of Montana is thought by 72 percent to benefit local communities economically, while 52 percent believe tourism jobs offer opportunity for advancement. However, 57 percent of statewide respondents worry that increased tourism in the state will not improve residents' lives.

Unfortunately, statewide respondents feel even more strongly than Custer County respondents that tourism development in their community will not influence them personally in an economic way. Sixty-nine percent do not see a connection between increased tourism and increased or more secure income for themselves, and seventy-two percent do not think they will benefit financially if tourism were to increase in their community.

The failure to recognize the connection between tourism development and personal benefit may be one of the main obstacles currently facing this type of development in the state, and also a reason for the neutral score on the Index of Tourism Support. Overall, however, Montana residents support continued tourism promotion by the state even though they do not see a direct economic benefit from these efforts.

**Table 29: Index of Tourism Support**

	Custer County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	--	5%	65%	30%	3.3	7%	17%	62%	14%	2.8
My community is a good place to invest in tourism development.	1%	18%	54%	27%	3.1	7%	27%	49%	17%	2.8
Increased tourism would help my community grow in the right direction.	--	10%	69%	21%	3.1	9%	31%	47%	13%	2.6
The overall benefits of tourism outweigh the negative impacts.	1%	14%	71%	14%	3.0	10%	21%	58%	11%	2.7
Tourism promotion by the state of Montana benefits my community economically.	5%	12%	74%	9%	2.9	6%	22%	60%	12%	2.8
I believe jobs in the tourism industry offer opportunity for advancement.	1%	31%	58%	10%	2.8	12%	36%	47%	5%	2.5
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	1%	33%	54%	12%	2.8	13%	44%	39%	4%	2.4
If tourism increases in my community, my income will increase or be more secure.	16%	46%	34%	4%	2.3	22%	47%	25%	6%	2.1
I will benefit financially if tourism increases in my community.	14%	50%	29%	7%	2.3	24%	48%	22%	6%	2.1
<b>Index of Tourism Support**</b>	<b>2.8</b>					<b>2.5</b>				

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

\*\* The Index of Tourism Support is the mean of the average scores for each statement.

## INDEX OF TOURISM CONCERN

The main issues of concern regarding tourism development deal with wage levels as well as crowding (Table 30).

**Custer County:** Over three-fourths (78%) of Custer County respondents believe that most tourism jobs pay low wages. Exactly half feel that tourists do not pay their fair share for the services they use, while 35 percent agree that vacationing in Montana influences too many people to move to the state. However, the vast majority (78%) does not feel the state is becoming too crowded because of tourists, and only 13 percent feel that out-of-state visitors limit their access to recreation opportunities.

Despite the wage issue, Custer County respondents are not too concerned when it comes to tourism development, as indicated by a 2.4 score for the Index of Tourism Concern. In this index, a higher score means a higher level of concern, and Custer County respondents scored below the neutral point of 2.5. Were it not for the wage issue, the score would have been even lower. However, ITRR estimates indicate that the average hourly wage paid for persons employed in the travel industry is \$8.47, well above minimum wage<sup>6</sup>.

**Statewide:** In the area of tourism concern, statewide respondents show a slightly more negative attitude than do Custer County respondents. The statements score higher for statewide respondents across the board, indicating a higher level of concern. Seventy-five percent feel that tourism jobs pay mostly low wages, while 55 percent feel that tourists do not pay their fair share for the services they use. The same percentage feels that a Montana vacation influences too many people to move to the state. However, the majority (59%) does not perceive the state as having a problem with crowding, and a full 67 percent do not see their recreation opportunities limited by the presence of out-of-state visitors.

With higher scores in all categories, it is no surprise that the Index of Tourism Concern is higher as well. At 2.6, it is at the positive side of the division point, indicating that there is a low level of concern regarding tourism development in the state as a whole.

**Table 30: Index of Tourism Concern**

	Custer County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I believe most of the jobs in the tourism industry pay low wages.	1%	21%	69%	9%	2.9	2%	23%	53%	22%	2.9
Tourists do not pay their fair share for the services they use.	11%	39%	43%	7%	2.5	5%	40%	36%	19%	2.7
Vacationing in Montana influences too many people to move to the state.	11%	54%	28%	7%	2.3	5%	40%	32%	23%	2.7
In recent years, Montana is becoming overcrowded because of more tourists.	13%	65%	21%	1%	2.1	9%	50%	25%	16%	2.5
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	19%	68%	10%	3%	2.0	12%	55%	21%	12%	2.3
<b>Index of Tourism Concern**</b>	<b>2.4</b>					<b>2.6</b>				

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

\*\* The Index of Tourism Concern is the mean of the average scores for each statement.

<sup>6</sup> Dillon, Thale. 2000. Employment and Wages: The Travel Industry in Montana. Technical Report 2000-1, University Travel Research Program, School of Forestry, The University of Montana. 9pp.

## LAND USE ISSUES

Montana has a rich land heritage that appeals to residents and visitors alike. A large part of Montana’s charm is related to its wide-open spaces, and residents are naturally sensitive with respect to how this resource is treated. Respondents were asked to express their agreement or disagreement with several statements related to land use issues, using the familiar 4-point scale (Table 31).

**Custer County:** Eighty-six percent of respondents agree that there is adequate undeveloped open space in the county, and only 32 percent worry about its potential disappearance. Seventy-four percent would support land use regulations to manage growth in the county, while only 13 percent feel their access to recreation opportunities is limited due to the presence of out-of-state visitors.

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

**Table 31: Land Use Issues**

	Custer County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
There is adequate undeveloped open space in my community.	2%	12%	67%	19%	3.0	7%	30%	49%	14%	2.7
I am concerned with the potential disappearance of open space in my community.	17%	51%	21%	11%	2.3	9%	33%	34%	24%	2.7
I would support land use regulations to help manage types of future growth in my community.	6%	20%	66%	8%	2.8	9%	19%	56%	16%	2.8
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	19%	68%	10%	3%	2.0	12%	55%	21%	12%	2.3

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

## TOURISM-RELATED DECISION-MAKING

Residents have strong feelings about participating in decisions that will ultimately affect their community and their own lives. They were asked to respond to two statements related to who should be making decisions about tourism in their community. Again, the 4-point scale was used (Table 32).

**Custer County:** Custer County respondents feel strongly that residents should be involved in decision-making regarding local tourism development. Ninety-five percent of respondents either agreed or agreed strongly that it is important that residents be involved in decisions about tourism, while 59 percent disagreed that decisions regarding tourism volume is best left to the private sector.

**Statewide:** On a statewide level as well, most respondents (95%) feel strongly that residents should be involved in the decision-making process when it comes to tourism development. Most disagree with the statement indicating that these decisions should be left entirely to the private sector (61%).

**Table 32: Tourism-related Decision-making**

	Custer County					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Average Score*
It is important that residents of my community be involved in decisions about tourism.	--	5%	59%	36%	3.3	1%	4%	52%	43%	3.4
Decisions about how much tourism there should be in my community are best left to the private sector.	10%	49%	33%	8%	2.4	21%	40%	26%	13%	2.3

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

## ADVANTAGES AND DISADVANTAGES OF TOURISM DEVELOPMENT

To further clarify the perceived benefits and costs of tourism development, respondents were asked what they thought would be the top advantage and disadvantage of increased tourism in their community. These were open-ended questions where respondents provided their thoughts in their own words. The responses were then assigned to general categories to facilitate comparison (Tables 33 and 34).

**Custer County:** The top advantage of tourism identified by Custer County respondents was overall economic benefit. Seventy-nine percent of respondents indicated more jobs, higher income and higher revenue for local businesses as the top advantages. In terms of disadvantages, a full 23 percent feel there are none associated with increased tourism, while 16 percent identify more traffic as the chief problem caused by tourism growth.

**Statewide:** Statewide respondents also identified improved economic conditions as being the top advantage of increased tourism in their community (73%). In terms of disadvantages, more traffic was of concern to a large portion of statewide respondents (24%), as was crowding (14%) and tourists moving to the state after visiting (10%).

**Table 33: Advantages Associated with Increased Tourism**

	<b>Custer County*</b>	<b>Statewide*</b>
Economic benefit	79%	73%
Potential for growth	8%	9%
More services available	5%	2%
Increased population	4%	1%
Cultural integration/learning	2%	2%
No advantage	1%	8%
Increased awareness	1%	2%
Income from the bed tax	--	2%
Better roads	--	1%
Cleaner parks, recreation areas	--	1%

\* Respondents could offer more than one suggestion.

**Table 34: Disadvantage Associated with Increased Tourism**

	<b>Custer County*</b>	<b>Statewide*</b>
No disadvantage	23%	9%
More traffic	16%	24%
Increased crime	12%	7%
Crowding	11%	14%
Tourists moving here	5%	10%
Pollution/Noise pollution	5%	3%
Abuse of facilities	4%	2%
Stress on local infrastructure	4%	4%
Decreased quality of life	4%	5%
Tourists don't pay their fair share	3%	3%
Litter	3%	3%
Increased cost of living	2%	4%
Condition of roads	2%	4%
Over-use/damage of scarce resources	1%	6%
Low-wage jobs	1%	2%
Tourist dollars not returned to community	1%	--
Seasonal	1%	--
Increased use of drugs	1%	--
Trespassing	--	1%
Economic dependency	--	1%
Commercialization	--	1%

\* Respondents could offer more than one suggestion.

## QUESTIONS SPECIFIC TO CUSTER COUNTY

The Custer County CTAP committee was given the opportunity to include questions specific to the region on the resident attitude questionnaire. The responses to these questions and other community-specific items are reported below.

### CUSTER COUNTY CHARACTERISTICS

The following three items deal with characteristics, both positive and negative, of Custer County. They were asked as open-ended questions to solicit residents' true feelings, and the answers reflect their own wording. The answers are used in the visioning part of the CTAP, where residents consider them when making development plans for the future (Tables 36, 37 and 38).

**Valued characteristics of Custer County:** Respondents were asked what characteristics of Custer County they value and would like to see continued into the future. At the top of the list was the small-town atmosphere of Miles City (41%), but residents also appreciate the area's agricultural industry (16%) and the Bucking Horse Sale (12%).

**Table 36: Valued Characteristics of Custer County**

<b>Characteristics*</b>	
Small-town atmosphere	41%
Agricultural industry	16%
Bucking Horse Sale	12%
Historical aspects	9%
Good schools	6%
Supportive community	6%
Traditional values	6%
Sparse population	5%
Open spaces	4%
Art Center	4%
Range Riders Museum	3%
VA hospital	3%
Respect for parks and recreation areas	3%
Slow, steady growth/Stable population	3%
Pride in community	2%
Clean environment	2%
Cost of living	2%
Rodeo	2%
Retail hub for area	2%
Friendly business people	1%
Community concerts	1%
Hot-air balloon races	1%
Cultural activities	1%

\*Respondents could give more than one answer.



**Missing characteristics of Custer County:** Another facet of planning, in addition to learning what should be kept, is finding out what positive aspects that can be developed within the community. In response to the question of what is missing from Custer County that residents would like to see in the future, 21 percent answered “business growth”. Another 18 percent would like to see more jobs, while 17 percent would like to see more retail stores.

**Table 37: Characteristics Missing from Custer County**

<b>Characteristics*</b>	
Business growth	21%
Jobs	18%
Retail stores	12%
Cultural events	10%
Youth recreation opportunities	9%
Swimming area/indoor pool	8%
Amusement park/recreation area	6%
Convention center	5%
Increased population	4%
Restaurants	3%
Historical site development	2%
Road maintenance	1%
Public golf course	1%
Trail systems	1%
Responsible economic development	1%
Stronger Chamber of Commerce	1%

\*Respondents could give more than one answer.

**Disliked characteristics of Custer County:** Planning for desired conditions is one thing, but one also has to be careful to avoid undesirable conditions. To that end, respondents were asked to identify what characteristics of Custer County they dislike and would not like to see continued into the future. The primary concern turned out to be business closings with associated job cuts (17%), but 13 percent are concerned with drug and alcohol use in the county, and another 12 percent worry about the general attitude of local residents. An additional 4 percent had no dislikes when considering Custer County.

**Table 38: Disliked Characteristics of Custer County**

<b>Characteristics*</b>	
Businesses closing/job cuts	17%
Drug and alcohol use	13%
Attitude of locals	12%
Lack of support for new job opportunities	8%
Bars and casinos	7%
No dislikes	4%
Pollution	4%
People leaving to find work	4%
Stagnant economy	4%
Chain restaurants and stores filling the city	4%
Game farms	2%
"Good Ole' Boys" groups in control	2%

\*Respondents could give more than one answer.

## STRENGTHS AND WEAKNESSES OF CUSTER COUNTY AS TOURIST DESTINATION

Residents were asked to identify what they felt were the strengths and weaknesses of Custer County as a tourist destination. These were open-ended questions as well (Tables 39 and 40).

**Strengths of Custer County as a Tourist Destination:** About one-third (32%) of Custer County respondents feel that the history of the area is the county's strongest asset as a tourist destination. Other valuable features include local people's interest in meeting tourists (15%), the Range Riders Museum (14%) and the Bucking Horse Sale (13%).

**Table 39: Strengths of Custer County as a Tourist Destination**

<b>Strengths*</b>	
History	32%
Local people's interest in meeting tourists	15%
Range Riders Museum	14%
Bucking Horse Sale	13%
Good hunting and fishing	12%
Good hotels and restaurants	9%
Open spaces	9%
Opportunities/land for activities	8%
Rural values, traditions and culture	8%
Location	7%
Near Yellowstone, Tongue rivers	7%
Beautiful countryside	3%
Strong Chamber of Commerce	1%
Community events	1%
Lewis and Clark Trail	1%
No strengths	1%
Culture	1%
Rodeos	1%
No taxes	1%
Weather	1%
Safe	1%
Little crowding	1%

\* Respondents could give more than one answer.

**Weaknesses of Custer County as a Tourist Destination:** Almost one-fourth (23%) of Custer County residents indicated that they feel the area lacks tourist attractions and that this lack represents the areas major weakness as a tourist destination. Seventeen percent feels the lack of recreation areas is a major weakness, while 9 percent thinks the area's out-of-the-way location is its main problem. Two percent of respondents see no weaknesses in Custer County.

**Table 40: Weaknesses of Custer County as a Tourist Destination**

<b>Weaknesses*</b>	
Lack of tourist attractions	23%
Lack of recreation areas	17%
Out-of-the-way location	9%
Attitude of locals	7%
Lack of services	6%
Lack of shopping opportunities	6%
Lack of advertisement	5%
Road conditions	3%
Lack of annual events	3%
Failure to capitalize on history	2%
Lack of funding to develop new attractions	2%
No weaknesses	2%
Lack of fishing areas	1%
No 24-hr visitor center	1%
No winter recreation	1%
Little scenic value	1%
Not enough entertainment	1%

\* Respondents could give more than one answer.

## TOURISM DEVELOPMENT OF CUSTER COUNTY RESOURCES

One economic development strategy is to build on attractions that already exist in an area. Custer County respondents were asked to rate their support for development of a variety of tourism and recreation resources in the county in an effort to learn what would garner the most support. The rating scale used here included 1 (No development), 2 (Maintain for local use only), 3 (Limited development) and 4 (Intensive development)(Table 41).

In evaluating the response to this item, the average score for each site was computed. The sites with the highest scores are the ones that have the most community support for development. Primarily, Custer County respondents support the building of a convention center in the area. Intensive development of this option is supported by 63 percent of respondents, with another 19 percent supporting limited development. Other development options with strong local support include building a visitor center (38 percent intensive/50 percent limited) and city beautification and clean-up (40 percent intensive/42 percent limited).

**Table 41: Potential Development of Custer County Resources**

Resources*	No additional development	Maintain for local use	Limited development	Intensive development	Average Score
Bike and walking paths	8%	17%	29%	46%	3.13
<b>Visitor center</b>	<b>10%</b>	<b>2%</b>	<b>50%</b>	<b>38%</b>	<b>3.17</b>
Range Riders Museum	14%	1%	58%	27%	2.98
Custer County Arts Center	9%	4%	57%	30%	3.07
River access development	9%	9%	44%	38%	3.12
Further development of area parks	7%	17%	47%	29%	2.97
<b>Convention center</b>	<b>10%</b>	<b>8%</b>	<b>19%</b>	<b>63%</b>	<b>3.36</b>
<b>City beautification/clean-up</b>	<b>7%</b>	<b>11%</b>	<b>42%</b>	<b>40%</b>	<b>3.16</b>
Oasis/Cook's Lake development/improvement	17%	15%	31%	37%	2.87
Historic image development	9%	12%	41%	38%	3.08
Interstate signs advertising Business Loop	12%	9%	39%	40%	3.08

\*Percentages may not add to 100 due to rounding.

## LOCALLY SUGGESTED ATTRACTIONS

In an effort to identify more of the existing attractions in Custer County, the resident attitude questionnaire solicited ideas from respondents regarding what they consider the region's strong points. The question was open-ended and ideas were requested for different categories of attractions within the county: historical, cultural, recreational, architectural, business/industrial, and major events.

While the list in Table 42 offers a wide variety in terms of types of attraction, it is worth noting that because no definition of each attraction type was given, some attractions occur in more than one category. Some of the attractions mentioned are in fact activities such as various sporting events. These are grouped with other activities that take place in the same place, making the location rather than the activity the attraction. There also seems to be some confusion when it comes to the official names of certain attractions, causing some to be mentioned several times under different names. Consultation with members of the CTAP committee helped clarify most of these occurrences, but some duplicates may still remain.

The Range Riders Museum topped the list of historical attractions (77%), while the Custer County Art Center topped the cultural category (88%). Spotted Eagle Recreation Area is the most popular recreational attraction (25%), the Main Street historic district the most popular architectural feature (52%), and Wal-Mart the primary business/industrial attraction (25%). Not surprisingly, the Bucking Horse Sale was mentioned by 96 percent in the "Major Events" category.

**Table 42: Locally Recognized Attractions**

<b>Attractions*</b>	
<b>Historical Attractions</b>	
Range Riders Museum	77%
Fort Keogh	12%
Trade center	5%
Bucking Horse Sale	4%
Main Street	4%
Ursuline Convent	2%
Custer County Art center	2%
<b>Cultural Attractions</b>	
Custer County Art Center	88%
Woolhouse Gallery	17%
Range Riders Museum	7%
Bucking Horse Sale	4%
<b>Recreational Attractions</b>	
Spotted Eagle Recreation Area	25%
Hunting and fishing	24%
Yellowstone and Tongue rivers	22%
Golf course	13%
Centra Sports Complex	12%
Denton Field/Newhouse Baseball Tournament	7%
Fairgrounds/Ice Hockey/Rodeo	7%
Riverside Park/Outdoor pool	4%
Bucking Horse Sale	3%
<b>Architectural Attractions</b>	
Main Street historic district	52%
Ursuline Convent	16%
Fort Keogh	8%
Custer County Arts Center	6%
<b>Business/Industrial Attractions</b>	
Wal-Mart	25%
Hospital/Medical center	15%
Fort Keogh research station	10%
Miles City Saddlery	8%
Trinity Rail Car Company	7%
Pine Hills School	5%
Main Street/Downtown	5%
Eastern Montana Industries	3%
Livestock auction	3%
Western Industries Manufacturing Company	3%
<b>Major Events</b>	
Bucking Horse Sale	96%
Eastern Montana Fair	5%
Newhouse Baseball Tournament	2%
Ram sale	2%
Hot Rod car show	1%

\* Respondents could offer multiple answers.

## CAPITALIZING ON THE LEWIS AND CLARK BICENTENNIAL COMMEMORATION

The last county-specific question on the survey solicited input in regard to the upcoming Lewis and Clark Bicentennial Commemoration starting in 2003. The Lewis and Clark Trail goes through Custer County; in fact, Miles City is located on the trail itself. Respondents were asked to make suggestions as to what Custer County can do to capitalize on this event (Table 43).

The most common suggestion (35%) was to advertise for the event. By increasing public awareness of the Corps of Discovery and by focusing on the role of Miles City in the expedition, respondents feel more visitors can be attracted to the area. Several respondents (11%) also suggested that arranging an educational concert to raise spirits would draw people to Custer County during the Commemoration. Other ideas included development of the original campsite on Pirogue Island in the Yellowstone River (9%) and exploratory river tours (9%).

**Table 43: Ideas to Capitalize on L & C Commemoration**

<b>Ideas*</b>	
Advertise	35%
Educational concert to increase spirit	11%
Develop original campsite	9%
River tours	9%
Plays/reenactments	5%
Trail walk/ride with historians	5%
Events at the Range Riders Museum	5%
Focus on history and meaning of city name	4%
Improve river access	4%
Focus on history of Yellowstone River	4%

\* Respondents could give more than one answer.

## GENERAL COMMENTS

Respondents were provided with space at the end of the survey form to include their own thoughts and comments. This was an open-ended format with no guidelines as to the topic of the comments, and thus they deal with a wide variety of issues. Unfortunately there is little consensus among the comments; no issue was raised by more than one respondent (Table 44).

**Table 44: General Comments by Custer County Respondents**

	<b>Count</b>
Tourists know very little about the agriculture market.	1
A sales tax would even out the burden on locals.	1
Fill Oasis with gravel and turn it into a park.	1
Lewis and Clark anniversary is an opportunity to promote Montana.	1
Montana would try to run out new mining industry.	1
Miles City needs a convention center to attract business.	1
Need to make better use of the junk vehicle disposal program.	1
Tongue River Railroad would provide jobs for locals.	1
Custer County's future looks bleak without new jobs.	1
Tourism could be good for Custer County.	1
Increased gambling could lead to increased crime.	1
Need recreational facilities for middle-aged people.	1
Recreational facility would alleviate need for going to a bar for companionship.	1
Miles City needs some type of manufacturing industry.	1
Need to capitalize on the "cowboy town" image.	1
Some tourists visit Montana because there is no sales tax.	1
Need to spend more on cleaning up rest areas.	1
Need to offer visitor information centers at border crossings.	1





**APPENDIX A:**  
**CUSTER COUNTY SURVEY INSTRUMENT**