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Exploring Tourism Development Potential:

Resident Attitudes in Kalispell, MT

CTAP 2001-2002

Prepared by

Thale Dillon

Holly C. Praytor

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Executive Summary

This report presents information about tourism in Kalispell, Montana. The report includes the results of a Kalispell resident attitude survey, providing residents' opinions and attitudes regarding tourism and tourism development in the state and in Kalispell, along with the results of a statewide survey for comparative purposes. The report also offers estimated travel volume and traveler characteristics for visitors to Flathead County, in which Kalispell is located. Much of this information was collected at the county level and is not available at the city level. Where available, data is given for Kalispell rather than Flathead County.

A mail-back questionnaire was administered to a randomly selected sample of 500 Kalispell households during October and November 2001, and to a statewide sample of 1,000 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 (1996 Survey Data):

- In 2001, over 3.9 million travel groups visited Montana. Of those, approximately 511,000 (13%) passed through Kalispell.
- Close to \$1.75 billion was spent statewide in 2001 by nonresident travelers. This figure amounts to approximately \$1,935 for every Montana resident.
- In Kalispell, nonresident visitors spent over \$74 million, or about \$5,212 per county resident.
- Travelers to Flathead County stayed in the state twice as long as statewide visitors.
- Flathead County visitors traveled mainly as couples, but also as families.
- Overnight visitors to Flathead County were more likely than statewide visitors to stay in campgrounds (public or private), but about equally likely to stay at a hotel or motel.
- Seventy-six percent of overnight visitors to Flathead County were in Montana primarily for vacation, while 12 percent were in the state primarily to visit friends and relatives.
- Vacationers in Flathead County were attracted to Montana primarily because of Glacier National Park.
- Wildlife watching was the most popular activity for overnight visitors to Flathead County, followed by nature photography and day hiking.
- Visitors to Flathead County spent the largest portion of their money at retail stores and in restaurants/bars.

RESIDENT CHARACTERISTICS AND ATTITUDES ABOUT TOURISM (2001 Survey Data):

- Respondents from Kalispell have resided in their community and in the state for about the same length of time as the statewide sample.
- Montana natives comprised over half of the Kalispell sample.
- The largest portion of Kalispell respondents earn their household income in the education and service sectors.
- The majority of Kalispell respondents feel tourism should have a role equal to other industries in the local economy, and ranked the tourism and recreation industry 6th on a list of desired economic development options.
- Most Kalispell respondents work in places that supply little or none of their products or services to tourists or tourist businesses.
- One-fourth of Kalispell respondents have frequent contact with tourists, and over half of respondents enjoy interacting with tourists.
- Kalispell respondents have a stronger attachment to their community than do statewide respondents. Both groups are somewhat concerned about the future of their communities.
- Ninety-eight percent of Kalispell respondents feel that the population in the area is increasing, and of those, the majority feels it is increasing too fast.

- Kalispell respondents feel improving the condition of job opportunities, as well as road conditions, cost of living, and traffic congestion can enhance their quality of life.
- The respondents of Kalispell are somewhat supportive of tourism development, although to a lesser degree than the statewide sample.
- 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 Kalispell, while increased traffic and crowding are seen as the leading disadvantages.

CONCERNS OF KALISPELL RESIDENTS:

- Kalispell respondents value the town's friendly small-town atmosphere and would like to see this characteristic continued into the future.
- Kalispell respondents dislike the current retail growth plan, as well as an observed increase in gambling, drug use and crime, and the current rate of population growth.
- Respondents feel industry/business is missing from the area and desire a proper growth plan.
- When prompted for ideas for a new image for Kalispell, the largest portion of respondents suggested emphasizing the safe and family-friendly aspects of their small community.
- Flathead Lake and the Big Mountain are the top two spots where residents take their visitors.
- If new attractions were to be developed in Kalispell, respondents suggest a cultural/civic center, a downtown city park and a sports arena with associated sports teams.
- When asked to rank a list of issues important to the future of Kalispell, maintaining the existing character of the town was rated as the most important.
- Glacier National Park, the Conrad Mansion, Flathead Lake and golfing are all attractions that Kalispell respondents suggest promoting.
- Casinos, chain stores and bars are features respondents feel should not be promoted in Kalispell.
- As a marketing strategy for Kalispell, some suggest advertising more while others want to emphasize the character and beauty of the surrounding natural resources.

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Introduction

This report is intended to provide a profile of current visitors to the City of Kalispell, as well as resident attitudes regarding tourism and the travel industry in the area. It combines the results of two different studies and is presented in two sections. The first section contains local nonresident visitor profiles, as well as profiles for statewide visitors. The visitor profiles were developed using research conducted by ITRR during the summer of 1996¹, and data is only available at the county level. For this reason, local profile information is provided for Flathead County rather than the City of Kalispell. The profile was developed from the subset of surveys submitted by nonresident travelers passing through the county. One exception is the expenditure data, which is location-specific and available at the city level. The reader is urged to keep this in mind while going through this report.

A second point to keep in mind is that at time of print, information based on data collected in 1996 is the only data available at the local level. In April ITRR released **statewide** nonresident visitor data collected in 2001, however, this data is not yet available for individual counties. While ITRR recognizes the fact that the travel industry in the Kalispell area and its associated customers have undergone considerable changes between 1996 and 2001, section 1 of this report is written based on two assumptions. First, it is assumed that some data is better than none at all. Second, it is assumed meaningless to compare local data from 1996 to statewide data from 2001. Thus, section 1 compares 1996 Flathead County/Kalispell data to 1996 statewide data. The author apologizes for any confusion and/or inconvenience this may cause.

The second section of this report contains an assessment of resident attitudes toward tourism and the travel industry in the City of Kalispell. This assessment is the result of mail-back questionnaires obtained from households in Kalispell as well as the state. Both Resident Attitude Surveys were conducted during October and November 2001 and the results are reported together to provide a comparison between resident opinions toward tourism in Kalispell and in Montana as a whole.

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/itr) at no charge.

¹ Parrish, J. N. Nickelson 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.

Section 1: The Nonresident Travel Study

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 Kalispell in the summer of 1996 (Table 1). Kalispell is located in Flathead County in northwestern Montana.

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

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

A Profile of Current Summer Visitors

ITRR nonresident travel estimates report that approximately 2,267,000 groups visited Montana during the 2001 **summer** season². 1996 nonresident survey data indicates that each travel group averages 2.6 people. It was estimated that 13 percent, or 294,700, of those groups passed through Kalispell, and that 21 percent of those who traveled through spent at least one night there.

Group Characteristics

Travel group characteristics for Flathead 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 Flathead County and the statewide sample (Table 2).

Flathead County: Most Montana visitors who spent at least one night in Flathead County traveled as couples (51%), while 30 percent traveled with family. Group size averaged 2.7 people, and 90 percent of travelers had visited Montana before this trip. Visitors stayed in the state for an average of 7 nights, and the majority of summer visitors chose to spend their nights in a hotel or a motel (62%). The largest portion of males was between 50 and 64 years of age (33%), as was the largest portion of females (31%).

² 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 2001.

Statewide: For visitors to the state as a whole, the largest portion traveled as couples as well (38%), followed by those who traveled as family (34%) The average group size was 2.6, a fraction smaller than for Flathead County visitors. Seventy-seven percent were repeat visitors, and average length of stay equaled 3.5 nights, half that of Flathead County visitors. A typical visitor to Montana was most likely to stay in a hotel or a motel (59%). 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%).

Table 2: Characteristics of Nonresident Summer Visitors

	Flathead County*	Statewide
Group Type		
Couple	51%	38%
Family	30%	34%
Alone	8%	17%
Friends	5%	7%
Family & friends	5%	3%
Business associates	<1%	1%
Group or club	<1%	--
Group Size	2.7	2.6
Have previously visited Montana	90%	77%
Nights spent in Montana	7.0	3.5
Accommodations used in Montana**		
Hotel or motel	62%	59%
Public campground	22%	16%
Private campground	21%	18%
Home of friend or relative	20%	21%
Resort or guest ranch	11%	5%
Undeveloped Campground	5%	4%
Condominium	3%	1%
Other	7%	5%
Age of Males		
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%
Age of Females		
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 1996 Nonresident Study

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

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

Visitors to the state as well as to Flathead County were from a variety of origins. California and Washington figure prominently on both lists, as does Colorado. However, a large portion of Flathead County visitors came from either Alberta or Oregon, while statewide visitors came from Idaho and Wyoming in significant numbers (Table 3).

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

Rank*	Flathead County**	Statewide
1	California	Washington
2	Washington	California
3	Alberta	Idaho
4	Colorado	Wyoming
5	Oregon	Colorado

Source: ITRR 1996 Nonresident Study

* 1=highest frequency

** Characteristics of Montana visitors who stayed at least one night in Flathead 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 pre-trip and 6 Montana information sources was included in the questionnaire (Tables 4 and 5).

Please keep in mind that the information presented here was collected in 1996, accounting for the low reported use of the Internet for travel planning information. As a point of comparison, a study by ITRR conducted in 2001 found that of all summer visitors to Montana, 43 percent use the Internet for pre-trip planning³.

Flathead County: Twenty-eight percent of visitors to Flathead 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 (29%) and National Park brochures (28%). The *most useful* sources of travel information used prior to arriving in Montana were AAA (34%), travel guide books (17%) and the Montana Travel Planner (16%).

Statewide: Thirty-nine 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 21 percent used National Park brochures. The *most useful* sources of information used prior to travel included AAA (38%), travel guide books (19%) and the Montana Travel Planner (12%).

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

Information Sources	Flathead County		Statewide	
	All Sources*	Most Useful Source	All Sources*	Most Useful Source
AAA	36%	34%	31%	38%
Travel guide book	29%	17%	22%	19%
National Park brochure	28%	11%	21%	10%
Montana Travel Planner	22%	16%	13%	12%
1-800 State travel number	13%	7%	7%	4%
Information from private businesses	10%	5%	7%	5%
Chamber or visitor bureau	9%	5%	7%	5%
State Park brochure	4%	2%	4%	1%
Internet travel information	7%	2%	5%	3%
Regional travel number	2%	<1%	<1%	<1%
Attending travel trade show	<1%	<1%	<1%	<1%
None of the sources	28%	N/A	39%	N/A

Source: ITRR 1996 Nonresident Study

* Visitors could indicate more than one information source.

Flathead County: Visitors were also asked where they received travel information while *in* Montana. Of overnight visitors to Flathead County, 12 percent used none of the sources listed. However, the travel information sources that were used included brochure racks (49%), persons in motels, restaurants, gas stations, etc. (48%), and persons in visitor information centers (45%). Visitors then indicated what source was the *most useful* while traveling *in* Montana. Thirty-one percent of respondents stated that persons in visitor information centers were most helpful, followed by persons in motels, restaurants, gas stations, etc. (19%) and brochure racks (18%).

Statewide: Twenty-three percent of statewide visitors indicated that while *in* Montana, they did not use any of the information sources listed. However, 36 percent obtained travel information from persons in motels, restaurants, gas stations, etc. Other prominent information sources were highway information signs (35%) and brochure racks (33%). Of the information sources used while *in* Montana, statewide visitors indicated that the *most useful* were persons in motels, restaurants, gas stations, etc. and persons in visitor information centers (23% each).

³ Nickerson, N. P. and T. Dillon. 2002. Nonresident Summer Visitor Profile: A Study of Summer Visitors to Montana. Research Report 2002-5, Institute for Tourism and Recreation Research, School of Forestry, The University of Montana, Missoula, MT. 33pp.

Table 5: Sources of Information Used When *in* Montana

	Flathead County		Statewide	
	All Sources*	Most Useful Source	All Sources*	Most Useful Source
Brochure racks	49%	18%	33%	15%
Person in motel, restaurant, gas station, etc.	48%	19%	36%	23%
Person in visitor information center	45%	31%	27%	23%
Highway information signs	43%	15%	35%	19%
Other	19%	16%	18%	18%
Business billboards	11%	<1%	10%	2%
Computer touch-screen info center	<1%	<1%	<1%	--
<i>None of these sources</i>	12%	N/A	23%	N/A

Source: ITRR 1996 Nonresident Study

*Visitors could indicate more than one information source.

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 6).

Flathead County: Ninety-six percent of Flathead County visitors indicated that vacation was one reason for traveling to Montana. Other frequently cited reasons included visiting family or friends (29%) and passing through the state (13%).

With respect to Flathead County overnight visitors' *primary* reason for visiting the state, over three-quarters (76%) were in Montana primarily on vacation. A smaller portion (12%) were in the state *primarily* to visit family or friends.

Statewide: Over three-fourths (77%) of statewide visitors cited vacation as one reason for their trip to Montana. Also frequently mentioned were visiting family or friends and passing through (31% each). 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 6: Reasons for Traveling to Montana

	Flathead County		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	96%	76%	77%	49%
Passing through	13%	5%	31%	21%
Visit family or friends	29%	12%	31%	16%
Business	6%	3%	10%	6%
Recreational shopping	10%	<1%	9%	1%
Necessity shopping	2%	--	4%	1%
Other	3%	2%	4%	3%
Medical	<1%	<1%	3%	2%
Convention or meeting	2%	1%	2%	1%

Source: ITRR 1996 Nonresident Study

* 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 7).

Flathead County: Many Flathead County vacationers were attracted by more than one of the state's many features. The top five Montana attractions were Glacier National Park (82%), the mountains (73%), rivers (49%), lakes (46%) and Yellowstone National Park (41%). Glacier National Park (60%) was by far the most popular *primary* attraction for Flathead County overnight visitors.

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 and open space (31% each). The most frequently cited *primary* Montana attractions for statewide visitors were Glacier National Park (24%) and Yellowstone National Park (21%).

Table 7: Attractions of Montana as a Vacation Destination

	Flathead County		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
Glacier National Park	82%	60%	31%	24%
Mountains	73%	10%	51%	12%
Rivers	49%	<1%	35%	1%
Lakes	46%	3%	26%	1%
Yellowstone National Park	41%	4%	39%	21%
Wildlife viewing	39%	1%	28%	2%
Open Space	37%	3%	31%	6%
Uncrowded areas	34%	4%	27%	4%
Camping	23%	1%	19%	2%
Hiking	23%	<1%	15%	1%
National forests	22%	<1%	15%	1%
Friendly people	21%	2%	18%	3%
Fishing	13%	2%	14%	6%
Historic sites	13%	<1%	13%	2%
Native American Culture	13%	<1%	10%	1%
Wilderness areas	11%	<1%	5%	1%
Special attractions	10%	4%	8%	6%
State parks	9%	--	6%	--
Northern Great Plains	8%	<1%	6%	--
Badlands	5%	--	6%	1%
Special events	3%	2%	4%	4%

Source: ITRR 1996 Nonresident Study

* 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 Flathead County (Table 8).

Flathead County: Watching wildlife was the most popular activity among those visitors spending a night in Flathead County (53%). Other popular activities included nature photography (44%), day hiking (43%), and recreational shopping (34%).

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 8: Recreational Activity Participation

	Flathead County*	Statewide*
Wildlife watching	53%	45%
Nature photography	44%	33%
Day hiking	43%	29%
Recreational shopping	34%	32%
Camping (developed area)	29%	28%
Picnicking	29%	26%
Historic/interpretive sites	28%	29%
Visiting family or friends	28%	34%
Visiting museums	19%	21%
Swimming (in pools)	16%	14%
Fishing	15%	15%
Nature studies	11%	9%
Visiting Native American sites	10%	10%
Swimming (natural areas)	10%	7%
Camping (primitive areas)	9%	10%
Gambling	9%	10%
River floating/rafting	9%	6%
Golfing	9%	5%
Motor boating	7%	9%
Special event/Festivals	6%	8%
Amusement park/center	5%	3%
Canoeing/Kayaking	4%	5%
Backpacking	3%	2%
Mountain Biking	3%	8%
Road Biking	3%	4%
Off-road/ATV	2%	2%
Water skiing	2%	1%
Sailing/Windsurfing	1%	<1%

Source: ITRR 1996 Nonresident Study

* 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 Flathead County during the summer, economic information is more inclusive and represents all groups who spent money in Kalispell throughout the entire year (Table 9).

Kalispell: Nonresident spending in Kalispell exceeded \$74 million in 2001, slightly more than 4 percent of all nonresident spending in Montana. Nonresidents spent the equivalent of \$5,212 per county resident, considerably more than the state per-capita average.

Statewide: Nonresident visitors spent close to \$1.75 billion in the state in 2001. This amounted to about \$1,935 per state resident.

Table 9: Expenditures by Nonresident Travelers in Kalispell and in Montana*

Distribution of Expenditures	Kalispell	Statewide
Lodging, campgrounds, etc.	8.7%	17.2%
Auto rental and repair, transportation	9.1%	4.0%
Gas and oil	14.8%	22.2%
Restaurant, bar	19.0%	18.4%
Groceries, snacks	9.9%	7.7%
Retail sales	34.6%	24.1%
Miscellaneous services	3.9%	6.4%
Total travel groups to sample area, 2001	511,000	3,938,000
Total expenditures in sample area, 2001 (2002\$)	\$74,125,000	\$1,746,00,000
Population (2000 census)	14,223	902,195
Per capita expenditures in sample area, 2001 (2002\$)	\$5,212	\$1,935

Source: ITRR 1996 Nonresident Study; Montana Census and Economic Information Center⁴.

* Economic information updated 05/01/02; percentages may not add to 100 due to rounding.

⁴ MT Department of Commerce, Census and Economic Information Center. Census 2000 Total Population. Accessed at <http://ceic.commerce.state.mt.us/C2000/index>.

Section II: The Resident Attitude Study

Methodology

A mail-back questionnaire was administered to a sample of Kalispell residents, as well as to a sample of statewide residents in the fall of 2001. The distribution followed an updated version of Dillman's Total Design Method (TDM)⁵, but differs only slightly from previous ITRR resident attitude surveys. The updates to the survey instrument and mailing sequence were implemented to improve the study's response rate, which had dwindled in past years. This year, the response rate for the state was 40 percent, however for Kalispell it was only 30 percent.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a randomly selected sample of 500 Kalispell households, as well as 1,000 Montana households. The 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, the 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 to all selected households, 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 the last mailing. For a copy of the survey instrument, please see Appendix A.

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 30 percent of the Kalispell residents polled (Table 10). 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 groups⁶, responses were weighted to more closely reflect the population of Kalispell. The results presented in this report reflect the adjusted dataset.

Table 10: Sample Sizes and Response Rates for 2001 Resident Attitude Survey

	Kalispell	Statewide
Resident questionnaires mailed out	500	1,000
Undeliverables	104	189
Usable resident questionnaires returned	120	328
Resident Attitude Study response rate	30%	40%

⁵ Dillman, Don A. 2000. *Mail and Internet Surveys: The Tailored Design Method*. John Wiley & Sons, Inc. New York, NY.

⁶ 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/mctcy99agegroup. 2000 Census data for county age groups unavailable at time of analysis.

Kalispell Residents' Attitudes

When 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: Respondents were asked to indicate their gender as well as their age (Table 11).

Kalispell: Forty-nine percent of respondents to the Kalispell survey were male, compared to the actual ratio for Kalispell of 50 percent. The average age was 40 years, and respondents ranged in age from 20 to 93 years.

Statewide: Of respondents to the statewide survey, 53 percent were male, compared to the actual statewide ratio of 50 percent. The average age was 47 years, with the age range spanning 18 to 94 years.

Table 11: Age and Gender Characteristics

	Kalispell	Statewide
Average age	40 years	47 years
Minimum age	20 years	18 years
Maximum age	93 years	94 years
Percent male	49%	53%
Percent female	51%	47%

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. Kalispell respondents were asked how long they had lived in Kalispell (Tables 12 and 13).

Kalispell: Fifty-nine percent of Kalispell respondents were native Montanans. On average, they had lived in Kalispell for 26 years and in the state for 34 years. Nineteen percent of respondents had lived in Kalispell longer than 40 years, while 21 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 their community for 24 years and in the state for 33 years. Twenty-one percent had lived in their community longer than 40 years, while 34 percent had lived there for 10 years or less.

Table 12: Residency Characteristics

	Kalispell	Statewide
Born in Montana	59%	53%
Mean years lived in community	26 years	24 years
Mean years lived in Montana	34 years	33 years

Table 13: Community Residency

	Kalispell	Statewide
10 years or less	21%	34%
11 to 20 years	37%	16%
21 to 30 years	13%	16%
31 to 40 years	10%	13%
41 to 50 years	7%	11%
51 to 60 years	4%	3%
61 years or more	8%	7%

Employment Status: A person's employment status, type of job and sector of employment can all influence support for tourism development. Obviously, the more dependent a person is financially on the travel industry, the greater their support for tourism (Table 14 and 15).

Kalispell: The largest portion of respondents to the Kalispell resident attitude survey derived their income from the education sector (22%), closely followed by the service sector (19%). Other sizeable income sources included wholesale/retail trade (16%) and health care (15%). One percent of respondents indicated that they were employed in the travel industry, however, employees in the service and retail sectors are likely to unknowingly be part of this industry.

Statewide: The most common sources of household income for statewide respondents were the education and service sectors (18% each). Other sources of household income included health care (17%), wholesale/retail trade and professional (15% each). Approximately three percent of statewide households derived some portion of their household income from the travel industry. As may be the case for Kalispell, some of the statewide respondents who indicated that they are employed in the service and retail sectors may in fact be part of the travel industry.

Table 14: Source of Household Income

Sector	Percent of households deriving income from sector*	
	Kalispell	Statewide
Education	22%	18%
Services	19%	18%
Wholesale/retail trade	16%	15%
Health care	15%	17%
Professional	12%	15%
Forestry or forest products	11%	5%
Construction	9%	13%
Manufacturing	8%	--
Finance, Insurance or Real Estate (FIRE)	8%	6%
Clerical	7%	7%
Restaurant or bar**	7%	6%
Transportation, Communication or Utilities	5%	8%
Armed Services	5%	4%
Agriculture	3%	13%
Other	2%	6%
Travel industry	1%	3%

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

** Contrary to common belief, 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". For clarity, it is included here as a separate category.

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 8 (least desired) indicating which they felt would be most desirable for their community (Tables 15 and 16).

Kalispell: The majority (60%) of Kalispell respondents believe that the travel industry should have a role equal to other industries in the local economy, while 15 percent feel it should have a dominant role. Tourism/recreation ranked sixth behind technology, agriculture/agribusiness, services, wood products and manufacturing in terms of desirability as an economic development opportunity for the county.

Statewide: Sixty-two percent of statewide respondents feel that tourism should have a role equal to other industries in their local economy. Twenty percent believe the industry should have a minor role while 14 percent favor a dominant role. When ranking tourism along with other industry segments according to economic desirability for the community, it placed fifth, behind services, technology, agriculture/agribusiness, and wholesale/retail trade.

Table 15: Role of Tourism in the Local Economy

	Kalispell	Statewide
No role	9%	4%
A minor role	16%	20%
A role equal to other industries	60%	62%
A dominant role	15%	14%

Table 16: Most Desired Economic Development

	Kalispell		Statewide	
	Rank	Mean*	Rank	Mean*
Technology	1	3.39	2	3.42
Agriculture/Agribusiness	2	3.78	3	3.60
Services	3	3.93	1	3.39
Wood Products	4	4.10	7	5.68
Manufacturing	5	4.15	6	4.51
Tourism/Recreation	6	4.37	5	4.22
Wholesale/retail trade	7	4.51	4	3.71
Mining	8	7.10	8	7.09

* Scores represent the mean of responses measured on a scale from 1 (most desired) to 8 (least desired).

Dependence on Tourism

Respondents were asked about the degree to which their place of work relied on tourists for its business. Again, the responses summarized below may be yet another indicator of the identity problem faced by the travel industry in that people do not necessarily realize that their employment is supported by tourist spending (Table 17).

Kalispell: Fifteen percent of Kalispell respondents indicated that their place of employment provides a majority of their products or services to tourists or tourist businesses. Forty-three percent work in places that provide none of their products or services to tourists or tourist businesses.

Statewide: Only 7 percent of statewide respondents work in places that provide a majority of their products or services to tourists or tourist businesses, whereas the largest portion of respondents (48%) is employed in places that provide none of their products or services to tourists or tourist businesses.

Table 17: Employment's Dependency on Tourists for Business

	Kalispell	Statewide
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	15%	7%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	42%	45%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	43%	48%

Interactions with Tourists

The extent of interaction between tourists and residents can affect 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 how they enjoy those interactions (Tables 18 and 19).

Kalispell: When asked about the frequency of their interactions with tourists, twenty-six percent indicated that they have frequent contact. Another 26 percent reported that they have infrequent contact with tourists visiting Kalispell. Although the frequency of interaction is relatively low, it is still significantly higher than for the state level, and the majority (57%) of Kalispell residents enjoy meeting and interacting with tourists when the occasion arises. Only 6 percent of respondents do not enjoy meeting and interacting with visiting tourists.

Statewide: Sixteen percent of statewide respondents reported having frequent contact with tourists visiting their community. Twenty-seven percent indicated that they have somewhat frequent contact with tourists, and 31 percent said they have infrequent contact. Over two-thirds (68%) of statewide respondents reported that they enjoy meeting and interacting with tourists. Twenty-eight percent are indifferent to meeting and interacting with tourists, while 4 percent do not enjoy these interactions.

Table 18: Frequency of Contact with Tourists Visiting Community

Degree of Frequency	Kalispell	Statewide
Frequent contact	26%	16%
Somewhat frequent contact	20%	27%
Somewhat infrequent contact	28%	26%
Infrequent contact	26%	31%

Table 19: Attitude Toward Tourists Visiting Community

Attitude	Kalispell	Statewide
Enjoy meeting and interacting with tourists	57%	68%
Indifferent about meeting and interacting with tourists	37%	28%
Do not enjoy meeting and interacting with tourists	6%	4%

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 12). Other measures are based on opinions that residents have about their community and perceived changes in population levels.

Community Attachment: To assess community attachment, respondents were asked to indicate their level of agreement with each of four statements on a scale from -2 (strongly disagree) to +2 (strongly agree). A mean response greater than 0 indicates aggregate agreement with the statement in question (Table 20).

Kalispell: The Index of Community Attachment (i.e. the mean of the scores for the four community attachment statements) indicates that Kalispell respondents are indeed attached to their community. An average rating of 0.84 indicates these people like where they live. They were positive in their feelings about their community, even in regard to opinions about the future. However, at 0.27, this item received the lowest score, indicating that residents have less confidence when it comes to the future of Kalispell.

Statewide: For respondents to the statewide survey, the Community Attachment Index produced a score of 0.76, which is lower than that of Kalispell. Still, it is safe to say that Montana residents, in general, are attached to their communities. However, as was the case with Kalispell respondents, statewide respondents also rated the future of their community lower than the other items in the index. With a score of 0.26, it is on par with Kalispell.

Table 20: Community Attachment Statements

	Kalispell Mean*	Statewide Mean*
I'd rather live in my community than anywhere else.	0.72	0.78
If I had to move away from my community, I would be very sorry to leave.	0.86	0.76
I think the future of my community looks bright.	0.27	0.26
It is important that the residents of my community be involved in decisions about tourism.	1.49	1.24
Index of Community Attachment**	0.84	0.76

* Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

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

Population Change: To assess residents' perceptions and opinions regarding population change in their community, respondents were asked to indicate if they perceived the population of their community to be changing and if so, how that change is occurring and at what rate (Tables 21 and 22).

Kalispell: One percent of Kalispell respondents feel that the town's population is not changing at all, while 98 percent feel it is increasing and less than one percent feel it is decreasing. Of those who feel the town's population is increasing, 38 percent feel it is increasing at the right rate while 59 percent feel it is increasing too fast. The population of Kalispell increased by 19 percent from 1990 to 2000⁷

Statewide: On the statewide level, 13 percent of respondents feel that the population of their community is unchanging. Sixty-four percent feel the population is increasing, while 23 percent feel it is decreasing. Of those who indicated that the population of their community is increasing, about half (48%) feel this is happening at the right rate. However, a full 50 percent feel this increase is occurring too fast. Of those who indicated that the population of their community is decreasing, the majority (62%) feels it is decreasing too fast. Thirty-one percent are happy with the perceived rate of decrease, while 7 percent feel the rate of decrease is too slow. How residents perceive population changes in the state is naturally a function of where in the state they live. Consequently, the statewide perception is not necessarily a good measure of comparison for the city-specific perception obtained from Kalispell. However, the statewide population increased by 13 percent between 1990 and 2000⁸.

Table 21: Perceptions of Population Change

	Kalispell	Statewide
Population is not changing	1%	13%
Population is increasing	98%	64%
Population is decreasing	<1%	23%

Table 22: Rate of Population Change

	Kalispell	Statewide
If you feel the population in your community is <u>increasing</u> , how would you describe the change?		
Population is increasing too fast	59%	50%
Population is increasing at the right rate	38%	48%
Population is increasing too slowly	3%	2%
If you feel the population in your community is <u>decreasing</u> , how would you describe the change?		
Population is decreasing too fast	--	62%
Population is decreasing at the right rate	--	31%
Population is decreasing too slowly	--	7%

⁷ MT Department of Commerce, Census and Economic Information Center. Census 2000 Total Population: Places. Accessed at http://ceic.commerce.state.mt.us/C2000/SF12000/SFplaces/sfpData/sfp_40075.txt

⁸ Ibid.

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 aspects, 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 of residents' opinions of the current quality of life in their community. This approach helps identify existing problem areas within the community, in turn providing guidance to developers. It is also necessary to understand how residents perceive increased tourism will change this current condition. Such perceptions define residents' attitudes toward this type of community development.

To this end, respondents were asked to rate the current condition of a number of factors that comprise their current level of quality of life using a scale ranging from -2 (very poor condition) to +2 (very good condition). They were also asked to rate how they believed increased tourism would influence these factors. The influence of tourism was rated using a scale of -1 (negative influence), 0 (both positive and negative influence), and +1 (positive influence) (Tables 23 and 24).

Kalispell: Kalispell respondents indicated that they are relatively satisfied with quality of life variables in their community. The items receiving the most favorable ratings were emergency services, safety from crime, overall community livability, and parks and recreation areas. Of these items that were ranked as being in the best current condition, only parks and recreation areas are expected to be mostly positively influenced by increased tourism activity. Tourism is expected to have both positive and negative influence on emergency services and overall community livability, while safety from crime is expected to be negatively influenced.

Several items were rated as being in less than good condition, including job opportunities, traffic congestion and cost of living. While the majority of respondents (51%) indicated that they expect increased tourism development to have a positive influence on the job situation, both traffic and the cost of living are expected to be negatively influenced.

Statewide: Overall, statewide respondents were more satisfied with the current condition of quality of life than Kalispell respondents. At this level, however, overall livability received the most favorable score, while job opportunities received the least favorable one.

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 23: Quality of Life—Current Condition (Scale from -2 to +2)

	Kalispell Mean*	Statewide Mean*
Emergency services	1.37	1.19
Safety from crime	1.10	1.02
Overall community livability	0.90	1.27
Parks and recreation areas	0.88	1.05
Infrastructure	0.81	0.56
Overall cleanliness and appearance	0.70	0.82
Education system	0.60	0.73
Museums and cultural centers	0.30	0.84
Conditions of roads and highways	0.00	0.31
Traffic congestion	-0.51	0.44
Cost of living	-0.51	0.00
Job opportunities	-0.64	-0.65

* Scores represent mean responses measured on a scale from -2 (very poor condition) to +2 (very good condition). The higher the score, the better is the perceived condition of the variable.

Table 24: Quality of Life—Tourism’s Influence (Scale from -1 to +1)

	Kalispell				Statewide			
	Negative Influence*	Positive & Negative Influence*	Positive Influence*	Mean Score**	Negative Influence*	Positive & Negative Influence*	Positive Influence*	Mean Score**
Emergency services	31%	41%	28%	0.00	16%	56%	28%	0.12
Safety from crime	42%	48%	10%	-0.32	36%	49%	15%	-0.20
Overall community livability	24%	56%	20%	0.00	10%	63%	27%	0.17
Parks and recreation areas	24%	35%	41%	0.18	13%	40%	47%	0.33
Infrastructure	24%	64%	12%	-0.12	30%	43%	27%	-0.02
Overall cleanliness and appearance	30%	36%	34%	0.00	24%	48%	28%	0.03
Education system	17%	61%	22%	0.00	9%	50%	41%	0.31
Museums and cultural centers	3%	21%	76%	0.73	1%	16%	83%	0.82
Conditions of roads and highways	38%	36%	26%	-0.12	38%	34%	28%	-0.09
Traffic congestion	83%	14%	3%	-0.80	68%	24%	8%	-0.60
Cost of living	54%	33%	13%	-0.41	28%	49%	23%	-0.06
Job opportunities	15%	34%	51%	0.36	6%	28%	66%	0.60

* Percentages may not add to 100 due to rounding.

** Scores represent responses measured on a scale from -1 (negative influence) to +1 (positive influence). The higher the score, the more positive the perceived influence of increased tourism on the condition of the variable.

Perceived Connections Between Tourism and Community Life

Index of Tourism Support

In addition to tourism's perceived influence on well-being, another method of measuring the degree of support for tourism development 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 -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement, while a negative score indicates disagreement (Table 25).

Kalispell: Most (70%) of Kalispell 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. Sixty-eight percent feel that their community is a good place for tourism investment, while 55 percent indicated that they believe increased tourism will help their community grow in the right direction. Sixty-one percent of respondents also feel that any negative impacts of tourism are outweighed by its benefits. The majority (81%) of Kalispell respondents feel that tourism promotion by the state benefits their community economically, but less than half (46%) believe that jobs in the travel industry offer opportunities for advancement. Even fewer (34%) feel that overall quality of life for Montana residents will improve with increased tourism. The majority of respondents (63%) do not see a connection between increased tourism in the community and a more secure income for themselves, just as 68 percent do not think that increased tourism will lead to any financial benefit on their part.

Based on these responses, the Kalispell Index of Tourism Support (i.e. the mean of the average scores for each statement) equals 0.02. While respondents clearly do see an economic benefit to their community coming from tourism, they do not wholeheartedly support the types of jobs they perceive as resulting from tourism. Neither do they see a connection between economic benefit to the community and personal benefit to themselves. Responses to these statements are contributing to the Index score being virtually neutral.

Statewide: On the whole, statewide respondents are more supportive of tourism and the travel industry than Kalispell respondents. The average score for each statement is almost consistently higher for statewide respondents than it was for Kalispell respondents. Eighty-one percent support continued tourism promotion and advertisement to out-of-state visitors, while two-thirds (65%) agree that their community is a good place to invest in tourism development. Sixty-five percent think that increased tourism in the state will help their community grow in the right direction, and 71 percent feel that the overall benefits of tourism outweigh any negative impacts. Tourism promotion by the state of Montana is thought by 78 percent to benefit local communities economically, while 49 percent believe tourism jobs offer opportunity for advancement. Fifty-three percent of statewide respondents think that increased tourism in the state will improve residents' quality of life.

Statewide respondents as well feel that tourism development in their community will not influence them personally in an economic way. Sixty-two percent do not see a connection between increased tourism and an increased or more secure income for themselves, and 70 percent do not think they will benefit financially if tourism were to increase in their community. However, the statewide responses produced an average score of 0.18 in the Index of Tourism Support, indicating that on average, Montana residents are somewhat supportive of tourism development.

The perceived lack of 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 close-to-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 25: Index of Tourism Support

	Kalispell					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.	11%	19%	58%	12%	0.42	7%	12%	63%	18%	0.72
My community is a good place to invest in tourism development.	8%	24%	53%	15%	0.42	9%	26%	51%	14%	0.37
Increased tourism would help my community grow in the right direction.	14%	31%	43%	12%	0.01	8%	27%	53%	12%	0.35
The overall benefits of tourism outweigh the negative impacts.	13%	26%	58%	3%	0.12	4%	25%	62%	9%	0.47
Tourism promotion by the state of Montana benefits my community economically.	4%	15%	65%	16%	0.74	5%	17%	61%	17%	0.67
I believe jobs in the tourism industry offer opportunity for advancement.	15%	39%	41%	5%	-0.19	10%	41%	43%	6%	0.00
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	15%	51%	33%	1%	-0.45	10%	37%	49%	4%	0.00
If tourism increases in my community, my income will increase or be more secure.	19%	44%	28%	9%	-0.38	24%	38%	30%	8%	-0.39
I will benefit financially if tourism increases in my community.	18%	50%	25%	7%	-0.47	25%	45%	25%	5%	-0.60
Index of Tourism Support**	0.02					0.18				

* Scores represent mean response measured on a scale from -2 (strongly disagree) to +2 (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. Responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement, while a negative score indicates disagreement (Table 26).

Kalispell: Close to all (91%) Kalispell respondents believe that most tourism jobs pay low wages. Sixty-five percent feel that tourists do not pay their fair share for the services they use, while 66 percent agree that vacationing in Montana influences too many people to move to the state. The majority (57%) does not feel the state is becoming too crowded because of tourists, but 45 percent feel that out-of-state visitors limit their access to recreation opportunities.

Again, the people of Kalispell take issue with the wages reportedly paid by the tourism and recreation industry in the area. In addition, as was confirmed previously in this report (Tables 21 and 22), they feel that there are too many people moving to their area⁹ and blame this in part on all the visitors who come to the area each year. The Index of Tourism Concern equals 0.53 for Kalispell, considerably higher than for the state as a whole.

Statewide: In the area of tourism concern, statewide respondents show a more positive attitude than do Kalispell respondents. The statements score lower for statewide respondents across the board, indicating a lower level of concern. Eighty 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. Fifty-one percent feel that a Montana vacation influences too many people to move to the state. However, the majority (57%) does not perceive the state as having a problem with crowding, and 64 percent do not see their recreation opportunities limited by the presence of out-of-state visitors.

With lower scores in all categories, the Index of Tourism Concern will inherently be lower as well. However, at 0.15, it is still positive, indicating that there is a low level of concern regarding tourism development in the state as a whole.

Table 26: Index of Tourism Concern

	Kalispell					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%	8%	55%	36%	1.18	2%	18%	58%	22%	0.79
Tourists do not pay their fair share for the services they use.	2%	33%	44%	21%	0.48	4%	41%	38%	17%	0.24
Vacationing in Montana influences too many people to move to the state.	3%	31%	41%	25%	0.54	8%	41%	32%	19%	0.12
In recent years, Montana is becoming overcrowded because of more tourists.	5%	38%	22%	35%	0.44	11%	46%	30%	13%	-0.12
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	5%	50%	33%	12%	0.00	11%	53%	23%	13%	-0.27
Index of Tourism Concern**	0.53					0.15				

* 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.

⁹ Between 1990 and 2000, the population of Kalispell grew by 19 percent, considerably faster than the state growth rate of 13 percent.

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, with responses ranging from -2 (strongly disagree) to +2 (strongly agree). A positive score indicates agreement while a negative score indicates disagreement (Table 27).

Kalispell: Forty-two percent of respondents agree that there is adequate undeveloped open space in the community while 76 percent are concerned about the potential disappearance of what does exist. Eighty percent would support land use regulations to manage growth in the community.

Statewide: Among statewide respondents, 59 percent agree that there is adequate undeveloped open space in their community, while sixty percent is concerned about its disappearance. Over three-fourths (78%) of statewide respondents would support some form of land-use regulations to control the types of future growth in their community.

Table 27: Land Use Issues

	Kalispell					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.	23%	35%	35%	7%	-0.31	8%	33%	47%	12%	0.21
I am concerned with the potential disappearance of open space in my community.	4%	20%	35%	41%	0.91	7%	33%	37%	23%	0.37
I would support land use regulations to help manage types of future growth in my community.	10%	10%	46%	34%	0.84	7%	15%	57%	21%	0.68

* Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (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, responses ranged from -2 (strongly disagree) to +2 (strongly agree), and as before, a positive score indicates agreement while a negative score indicates disagreement (Table 28).

Kalispell: Kalispell respondents feel strongly that residents should be involved in decision-making regarding local tourism development. Ninety-eight percent of respondents either agreed or agreed strongly that it is important that residents be involved in decisions about tourism, while 70 percent disagreed that decisions regarding tourism volume are best left to the private sector, emphasizing the desire for public involvement.

Statewide: On a statewide level as well, most respondents (92%) 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 (67%), indicating that the public needs to be involved at all levels.

Table 28: Tourism-related Decision-making

	Kalispell					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.	-	2%	45%	53%	1.49	2%	6%	51%	41%	1.24
Decisions about how much tourism there should be in my community are best left to the private sector.	32%	38%	20%	10%	-0.62	26%	41%	25%	8%	-0.50

* Scores represent responses measured on a scale from -2 (strongly disagree) to +2 (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 29 and 30).

Kalispell: The top advantage of tourism identified by Kalispell respondents was overall economic benefit. Sixty-nine percent of respondents indicated more jobs, higher income and higher revenue for local businesses as the top advantages. In terms of disadvantages, 32 percent identified more traffic as the chief problem caused by tourism growth, followed by crowding (15%).

Statewide: Statewide respondents also identified improved economic conditions as being the top advantage of increased tourism in their community (84%). In terms of disadvantages, crowding was of concern to a large portion of statewide respondents (20%), as was more traffic (19%).

Table 29: Advantages Associated with Increased Tourism

	Kalispell *		Statewide*	
	Number of Responses*	Percent of Responses**	Number of Responses*	Percent of Responses**
Economic benefit	70	69%	236	84%
No advantage	13	13%	18	6%
Reduced resident taxes	4	4%	--	--
Better roads	3	3%	1	<1%
Sharing culture	2	2%	9	2%
Open space, parks protected	2	2%	--	--
Non-polluting, clean income generator	2	2%	--	--
More people moving to community	2	2%	4	1%
Encourage friendliness	2	2%	--	--
City more progressive	1	1%	--	--
Keeps town clean	1	1%	--	--
More activities	1	<1%	--	--

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Table 30: Disadvantages Associated with Increased Tourism

	Kalispell		Statewide	
	Number of Responses*	Percent of Responses**	Number of Responses*	Percent of Responses**
More traffic	37	32%	53	19%
Too many people/crowding	17	15%	57	20%
Low-wage jobs	10	9%	--	--
Stress on facilities and services	9	8%	40	15%
Increased prices	6	5%	11	4%
Deteriorating quality of life	5	4%	--	--
Seasonal benefits, only benefits a few	3	2%	--	--
Lack of respect	3	2%	--	--
Negative attitudes	3	2%	--	--
Increased crime	2	2%	11	4%
Attention focused on tourists	2	2%	--	--
No disadvantage	2	2%	37	13%
Pollution/noise pollution	1	1%	14	5%
Outside influences	1	1%	--	--
Loss of open space	1	1%	--	--
Overuse of resources, environmental impacts	1	1%	--	--
Drugs	1	<1%	--	--
Increased taxes	1	<1%	--	--

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Questions Specific to Kalispell

The Kalispell 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. With one exception, the following are all responses to open-ended questions.

Kalispell Characteristics

The following three items deal with characteristics, both positive and negative, of Kalispell. 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 they are considered by residents when making development plans for the future (Tables 31, 32 and 33).

Valued characteristics of Kalispell: Respondents were asked what characteristics of Kalispell they value and would like to see continued into the future. At the top of the list was the friendly small town atmosphere (47%), but residents also appreciate the area's scenery and open space (17%) and the safety and low crime rates (8%).

•

Table 31: Valued Characteristics of Kalispell

Characteristics*	Number of Respondents*	Percent of Responses**
Small town, friendly atmosphere	65	47%
Scenery, outdoor, open space	23	17%
Low crime, safety	11	8%
Parks and recreation	6	4%
Agriculture	5	4%
Lumber industry	5	4%
Locally-owned businesses	3	2%
Cultural events and activities	3	2%
Old buildings	3	2%
Schools	3	2%
Clean water	2	2%
Affordable real estate	2	2%
Quality of life	1	1%
Diversity	1	1%
Restaurants	1	1%
Shopping	1	< 1%
Business expansion and growth	1	< 1%
Downtown	1	< 1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Disliked characteristics of Kallspell: Planning for desired conditions is one thing, however, one also has to be careful to avoid undesirable conditions. To that end, respondents were asked to identify what characteristics of Kallspell they dislike and would not like to see continued into the future. The primary concern turned out to be the current growth plan (23%), but 15 percent are also concerned with gambling, drug use and crime, and another 13 percent worry about population growth and people moving to the area.

Table 32: Disliked Characteristics of Kallspell

Characteristics*	Number of Respondents*	Percent of Responses**
Retail growth plan, business growth	30	23%
Gambling, drugs, crime	19	15%
Population growth, people moving here	16	13%
Out-of-towners, focus on tourists	9	7%
Lack of growth plan	8	7%
Lack of jobs, low wages	8	6%
Cost of living	4	4%
Traffic	4	3%
City vs. County conflict	4	3%
Negative attitude, close-mindedness	4	3%
Development of open space, subdivisions	4	3%
Environmentalists	3	3%
Government regulations	2	2%
Increase in service industry	2	2%
Limited downtown parking	2	1%
Fast pace	2	1%
Teenage mothers	1	1%
Downtown renovation	1	< 1%
Schools	1	< 1%
Outside influences	1	< 1%
Transients	1	< 1%
County fair	1	< 1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Missing characteristics of Kalispell: Another facet of planning, in addition to learning what should be kept, is finding out what positive aspects can be developed within the community. In response to the question of what is missing from Kalispell that residents would like to see in the future, 36 percent answered “industry, businesses.” Another 11 percent would like to see a new growth plan, while 8 percent would like to see improved traffic flow through town.

Table 33: Characteristics Missing from Kalispell

Characteristics*	Number of Responses*	Percent of Responses**
Industry, businesses	47	36%
Growth plan	15	11%
Improved traffic flow	10	8%
Places to shop	10	7%
Restaurants	6	5%
Cultural events	6	4%
Civic center	5	4%
Recreation	5	4%
Bike path	3	3%
Better schools	3	3%
Affordable housing, rent	3	2%
Teen center, youth activities	3	2%
Better citizen representation	3	2%
Affordable downtown parking	2	2%
Park	1	1%
Beach on Foy's Lake	1	1%
Evergreen annexation	1	1%
Fountains	1	< 1%
Resort tax	1	< 1%
History	1	< 1%
Sidewalks	1	< 1%
Common sense	1	< 1%
Sports team	1	< 1%
More tourism	1	< 1%
Better airfare	1	< 1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Kalispell Image

Members of the CTAP Action Committee suggested that it may be easier to market Kalispell as a tourist destination if the town had an image. One survey question was devoted to soliciting residents' ideas for such an image. Again, the safe and family-friendly feel of a small community is what resonates the most with respondents (36%).

Table 34: Suggestions for the Image of Kalispell

	Number of Respondents*	Percent of Responses**
Small community, safe, family-friendly	21	36%
Business friendly	4	8%
Visitors welcome, then go away	4	7%
Scenery	4	6%
Vibrant downtown	4	6%
Maintain the "old town" look	3	6%
Recreation	3	5%
Bar-capital of Montana	2	4%
Progressive City	2	4%
By-pass	2	3%
Friendly "big city"	2	3%
Last best place	1	3%
A lot of bike paths	1	2%
Shopping	1	2%
Sitting bear in front of mall	1	2%
Tourist center	1	2%
Affordable	1	<1%
Gateway to Glacier	1	<1%
Flower garden at entrance to town	1	<1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Where Kalispell Residents Take Their Visitors

When looking to tourism development in an area, it can be a good idea to work with attractions that already exist there in order to reduce both impact and cost. To that end, one survey question asked respondents where they take people who come to visit. Respondents were encouraged to include attractions and specific locations, as well as private businesses. Glacier National Park is by far the most popular destination (30%), followed by Flathead Lake (16%) and the Big Mountain (9%).

Table 35: Attractions Visited by Residents and Visitors

Attractions	Number of Respondents*	Percent of Responses**	Attractions	Number of Respondents*	Percent of Responses**
Glacier National Park	83	30%	Logan Pass	1	1%
Flathead Lake	43	16%	Polebridge	1	1%
Big Mountain	25	9%	Rafting	1	1%
Jewel Basin	14	5%	Hidden Lakes	1	1%
Woodland Park	11	4%	Sizzler	1	1%
Conrad Mansion	11	4%	Buffalo Hill Golf	1	1%
Bigfork	9	3%	Tally Lake	1	1%
Whitefish	8	3%	Lawrence Park	1	<1%
Moose's Saloon	6	2%	Show Thyme	1	<1%
Golfing	4	2%	Movies	1	<1%
Kalispell Center Mall	4	2%	Vista Linda	1	<1%
Water slides	4	2%	Art Galleries	1	<1%
Hungry Horse Dam	4	1%	Lighter Side	1	<1%
Painted Horse	4	1%	Bitterroot Lake	1	<1%
Museum	3	1%	Charlie Wong's	1	<1%
Scotty's Bar	3	1%	Julie's Restaurant	1	<1%
Blacktail ski area	3	1%	Ball games	1	<1%
Fishing	2	1%	Spencer's	1	<1%
Café Max	2	1%	Skiing	1	<1%
Blue Moon Night Club	2	1%	Arts and crafts	1	<1%
Rocco's	2	1%	Depot Park	1	<1%
Downtown stores	2	1%	Grouse Mountain	1	<1%
Knead Café	2	1%	Library	1	<1%
Bison Range	2	1%	The Yaak	1	<1%
Center for Performing Arts	2	1%	Sykes Grocery	1	<1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Suggestions for New Attractions to be Developed In Kalispell

CTAP committee members also wanted to know Kalispell residents' opinions on developing new attractions in the area. A cultural or civic center is wanted by 15 percent of respondents, while 13 percent want a city park and 11 percent would like to see a sports arena with associated sports teams.

Table 36: New Attraction Suggestions

Attractions	Number of Respondents*	Percent of Responses**
Cultural center, civic center, museum	13	15%
Downtown city park	12	13%
Sports arena, sports teams	10	11%
Theme park	7	8%
Teen center, recreation center	7	8%
Ice rink	5	6%
Carousel	4	4%
Bike trails	3	3%
Indoor water park, pool	3	3%
College theater	3	3%
Dinner and dance establishment	2	3%
Downtown retail center	2	3%
Bigger mall	2	3%
Olive Garden	2	3%
Concert hall	2	3%
Train tours	2	2%
Zoo	2	2%
Fountain	1	1%
Skate park	1	1%
IMAX Theater	1	1%
Car shows	1	1%
Antique show	1	1%
City band	1	1%
Fairgrounds	1	<1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Important Issues for the Future of Kalispell

As part of Kalispell's city development effort, nine "themes" that are considered important to the city's future have been identified. Respondents were asked to rank these themes in order of importance on a scale from 1 to 9, with 9 being the most important. For this question, the higher the average score, the more important the item. Maintaining the existing character of Kalispell was most important to respondents (6.20), while expanding retail and shopping opportunities turned out the least important (4.02).

Table 37: Important issues for Kalispell's future

	Kalispell	
	Rank	Mean*
Maintaining the existing character of Kalispell	1	6.20
Diversifying the Kalispell economy	2	5.89
Protecting the natural environment	3	5.87
Developing a Highway 93 by-pass	4	5.39
Making downtown Kalispell more attractive and "walkable"	5	5.07
Recruiting and expanding business development	6	4.95
Improving facilities and attractions for our visitors	7	4.70
Promoting more tourism	8	4.31
Expanding retail and shopping opportunities	9	4.02

* Scores represent the mean of responses measured on a scale from 1 (least important) to 9 (most important).

Kalispell Attractions to Promote and Not to Promote

In most communities there are attractions that are worthy of promotion. For the most part, residents are accepting of this taking place, however, in some cases, residents are more reluctant to share “their” spots with outsiders. In addition, the development of certain types of attractions may, for various reasons, be deemed undesirable by some. The following two questions deal with these issues. The first question solicits ideas for attractions in the Kalispell area that *should* be promoted, while the second question asks what *should not* be promoted in the area.

Attractions to promote: Topping the promotion list is Glacier National Park (13%), followed by the Conrad Mansion (12%), Flathead Lake (12%) and golfing (11%).

Table 38: Kalispell Attractions to Promote

Attractions	Number of Respondents*	Percent of Responses**
Glacier National Park	17	13%
Conrad Mansion	15	12%
Flathead Lake	15	12%
Golfing	14	11%
Shopping center	10	7%
Central School Museum	6	5%
Woodland Park	5	4%
Cultural events	4	3%
Fairgrounds	4	3%
City Park	3	3%
Hungry Horse Dam	3	2%
Hockaday Art Museum	3	2%
Water slides	3	2%
Big Mountain	3	2%
Blacktail	3	2%
Winter outdoor activities	3	2%
Libraries	2	2%
Skate park	2	2%
Sykes Grocery	2	2%
Wheat Montana	2	2%
Depot Park	2	1%
Lawrence Park	2	1%
Horse trails	1	1%
Conferences	1	1%
Raceway Park	1	1%
Rails to Trails	1	1%
Buffalo Hill Golf Course	1	1%
Bowling alley	1	1%
Swimming pool	1	1%
Fatt Boys	1	<1%
Scotty's Bar	1	<1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Attractions NOT to promote: Of possible attractions that could be promoted in Kalispell, the least desirable to city residents are casinos/gambling (31%), chain stores (20%) and bars (12%).

Table 39: Kalispell Attractions NOT to Promote

Attractions	Number of Respondents*	Percent of Responses**
Casinos, gambling	17	31%
Chain stores	11	20%
Bars	6	12%
Auto racing, motor sports	4	8%
Real Estate	4	7%
Shopping malls	3	6%
Horse racing	1	2%
McDonald's	1	2%
Snowmobile areas	1	2%
Water slides, water sports	1	2%
Downtown	1	1%
Car lots	1	1%
Woodland Park	1	1%
Lawrence Park	1	1%
Evergreen	1	1%
Grainery building	1	<1%
Fairgrounds	1	<1%
County Court House	1	<1%
All attractions	1	<1%
Hunting, fishing	1	<1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

Better Marketing of Kalispell as a Tourist Destination

The last aspect the Kalispell CTAP committee wanted was residents' ideas on how to better market Kalispell as a tourist destination. The top suggestions included more advertising and maintaining the beauty and character of the area's natural resources (19% each), as well as emphasizing the proximity to Glacier National Park (11%).

Table 40: Marketing Kalispell as a Tourist Attraction

	Number of Respondents*	Percent of Responses**
Advertise more	12	19%
Maintain character and beauty of natural resources	12	19%
Close to Glacier National Park	7	11%
Enhance current programs, attractions	6	9%
Diversity of activities	5	9%
Place to stay	3	5%
Shopping	3	5%
Country charm, small town	3	4%
Build new attractions	2	3%
Lower airfare	2	3%
Family oriented	2	3%
Hiking	2	3%
Christmas decorations	1	2%
Fishing	1	2%
Festivals	1	2%
Conventions	1	2%
Art	1	<1%

* Respondents could offer more than one suggestion.

** Percent of responses may not seem to correspond completely with the given number of responses due to the percentages reflecting the weighted data set.

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 (Table 41). For a list of comments cited verbatim, please see appendix B.

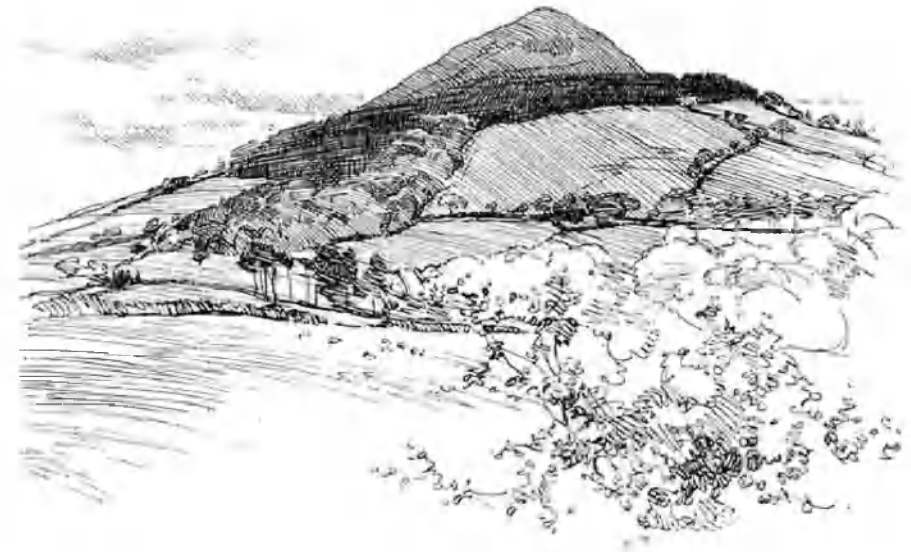
Table 41: General Comments by Kalispell Respondents

	Count
General anti-tourism	6
Taxes	5
Financial situation	4
Miscellaneous	4
General pro-tourism	1
Need growth	3
Personal history	2
Planning issues	2
Need more entertainment for teens	2
Against urban sprawl, development	1
Need by-pass	1
Tourism brings positive and negative improvements	1
Live outside of Kalispell	1
Move the fairgrounds	1

Appendix A: Kalispell Survey Instrument

Please include any additional comments below:

Resident Attitudes Toward Tourism in Kalispell



Fall 2001



Thank you for your participation!
Please place your completed survey in the
postage-paid envelope and drop it in any mailbox.

Institute for Tourism and Recreation Research

The University of Montana
32 Campus Drive #1234
Missoula, MT 59812-1234

PART 1. Please indicate your involvement in the tourism industry and the role you think it should have in the Kalispell economy.

1. How much contact do you have with tourists visiting Kalispell? Please use a checkmark (?) to indicate your answer.

- Frequent contact
- Somewhat frequent contact
- Somewhat infrequent contact
- Infrequent contact

2. Which of the following statements best describes your behavior toward tourists in Kalispell?

Please ? your answer.

- I enjoy meeting and interacting with tourists.
- I am indifferent about meeting and interacting with tourists.
- I do not enjoy meeting and interacting with tourists.

3. Which of the following statements best describes your job? Please ? your answer.

- My place of work provides the majority of its products or services to tourists or tourist businesses.
- My place of work provides at least part of its products or services to tourists or tourist businesses.
- My place of work provides none of its products or services to tourists or tourists businesses.

4. Compared to other industries, how important a role do you think tourism should have in Kalispell?

Please ? your answer.

- No role
- A minor role
- A role equal to other industries
- A dominant role

5. What types of economic development would you like to see in Kalispell? Please rank options 1 through 8, with 1 being the most desired.

- | | |
|---------------------------------------------|--------------------------------------------------------------|
| <input type="checkbox"/> Mining | <input type="checkbox"/> Agriculture/Agribusiness |
| <input type="checkbox"/> Wood Products | <input type="checkbox"/> Retail/Wholesale Trade |
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Services (health, businesses, etc.) |
| <input type="checkbox"/> Tourism/Recreation | <input type="checkbox"/> Technology |

6. In your opinion, how is the population changing in Kalispell? Please ? your answer.

- Population is not changing (please skip to PART 2)
- Population is increasing
- Population is decreasing



6A If you feel the population of Kalispell is changing, how would you describe the change? Please ? your answer.

- Too fast
- About right
- Too slow

PART 2. The following questions are specific to Kaiispeii. Please share your thoughts and opinions as they wiii be helpfui in making responsible decisions for your community.

1. What characteristic of Kalispell do you value and would like to see continued into the future?

2. What characteristic of Kalispell would you prefer not to see continued into the future?

3. What is missing from Kalispell that you would like to see in the future?

4. Do you have a suggestion for an image for the City of Kalispell?

5. When you have friends or relatives come visit you in Kalispell, where do you take them? Please feel free to include attractions, specific locations, restaurants, and so on.

5. If a new attraction were to be developed in the city of Kalispell, what kind of attraction would you suggest?

7. The following represent a list of issues that are considered important for the future of Kalispell. Please rate each item on a scale from 1 to 9, with 9 being the most important.

- Diversifying the Kalispell economy
- Protecting the natural environment
- Recruiting and expanding business development
- Promoting more tourism
- Maintaining the existing character of Kalispell
- Making downtown Kalispell more attractive and "walkable"
- Improving facilities and attractions for our visitors
- Developing a HWY 93 bypass
- Expanding retail space and shopping opportunities

3. Please name some attractions (places or activities) in Kalispell that you would like to see promoted to visitors.

9. Please name some attractions (places or activities) in Kalispell that you would NOT like to see promoted to visitors.

10. In your opinion, how can Kalispell be better marketed as a tourist destination?

PART 3. Questions concerning quality of life in Kalispell.

1. Please rate the current condition of each of the following elements of quality of life in Kalispell. Please circle one answer for each item.

	Very Poor Condition	Poor Condition	Good Condition	Very Good Condition	Don't Know
Emergency services (police, fire, etc.)	1	2	3	4	DK
Museums and cultural centers	1	2	3	4	DK
Job opportunities	1	2	3	4	DK
Education system	1	2	3	4	DK
Cost of living	1	2	3	4	DK
Safety from crime	1	2	3	4	DK
Condition of roads and highways	1	2	3	4	DK
Infrastructure (water, sewer, etc.)	1	2	3	4	DK
Traffic congestion	1	2	3	4	DK
Overall community livability	1	2	3	4	DK
Parks and recreation areas	1	2	3	4	DK
Overall cleanliness and appearance	1	2	3	4	DK

2. Please indicate how you think the following elements of quality of life would be influenced if tourism were to increase in Kalispell. Please circle one answer for each item.

	Negative Influence	Both Positive and Negative	Positive Influence	No Influence	Don't Know
Emergency services (police, fire, etc.)	-	+/-	+	NI	DK
Museums and cultural centers	-	+/-	+	NI	DK
Job opportunities	-	+/-	+	NI	DK
Education system	-	+/-	+	NI	DK
Cost of living	-	+/-	+	NI	DK
Safety from crime	-	+/-	+	NI	DK
Condition of roads and highways	-	+/-	+	NI	DK
Infrastructure (water, sewer, etc.)	-	+/-	+	NI	DK
Traffic congestion	-	+/-	+	NI	DK
Overall community livability	-	+/-	+	NI	DK
Parks and recreation areas	-	+/-	+	NI	DK
Overall cleanliness and appearance	-	+/-	+	NI	DK

5. Please indicate your level of agreement or disagreement with each of the following statements regarding tourism in Kalispell and in the state of Montana. Please circle your answers.

	Strongly Disagree	Disagree	Agree	Strongly Agree
I'd rather live in Kalispell than anywhere else.	1	2	3	4
If I had to move away from Kalispell, I would be very sorry to leave.	1	2	3	4
I think the future of Kalispell looks bright.	1	2	3	4
Kalispell is a good place to invest in new tourism development.	1	2	3	4
Increased tourism would help Kalispell grow in the right direction.	1	2	3	4
It is important that the residents of Kalispell be involved in decisions about tourism.	1	2	3	4
Decisions about how much tourism there should be in Kalispell are best left to the private sector.	1	2	3	4
There is adequate undeveloped open space in Kalispell.	1	2	3	4
I am concerned about the potential disappearance of open space in Kalispell.	1	2	3	4
I would support land use regulations to help manage types of future growth in Kalispell.	1	2	3	4
Tourism promotion by the state of Montana benefits Kalispell economically.	1	2	3	4
If tourism increases in Kalispell, my income will increase or be more secure.	1	2	3	4
I will benefit financially if tourism increases in Kalispell.	1	2	3	4
I support continued tourism promotion and advertising to out-of-state visitors by the State of Montana.	1	2	3	4
I believe jobs in the tourism industry offer opportunity for advancement.	1	2	3	4
Vacationing in Montana influences too many people to move to the state.	1	2	3	4
In recent years, Montana is becoming overcrowded because of more tourists.	1	2	3	4
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	1	2	3	4
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	1	2	3	4
Tourism increases opportunities to meet people of different backgrounds and cultures.	1	2	3	4
Tourists do not pay their fair share for the services they use.	1	2	3	4
I believe most of the jobs in the tourism industry pay low wages.	1	2	3	4
The overall benefits of tourism outweigh the negative impacts.	1	2	3	4

4. In your opinion, what is the primary advantage of increased tourism in Kalispell?

5. In your opinion, what is the primary disadvantage of increased tourism in Kalispell?

PART 4. Please tell us a little bit about yourself. Keep in mind that this survey is completely confidential.

1. How many years have you lived in Kalispell? _____ years in Kalispell

2. How many years have you lived in Montana? _____ years in Montana

3. What is your age? _____ your age in years

4. Were you born in Montana? Please ? your answer.
 Yes No

5. What is your gender? Please ? your answer.
 Male Female

6. What is your employment status? Please ? your answer.
 Employed Retired Unemployed/Disabled

7. Please use the list below to let us know the type of work held by members of your household. Use a check mark (?) to indicate your answers.

- | | | |
|--------------------------------------------------------|-----------------------------------------|---------------------------------------------------------------------|
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Agriculture | <input type="checkbox"/> Construction |
| <input type="checkbox"/> Wholesale/retail trade | <input type="checkbox"/> Health care | <input type="checkbox"/> Forestry/forest products |
| <input type="checkbox"/> Travel industry | <input type="checkbox"/> Professional | <input type="checkbox"/> Transportation, Communication or Utilities |
| <input type="checkbox"/> Education | <input type="checkbox"/> Clerical | <input type="checkbox"/> Finance, Insurance or Real Estate |
| <input type="checkbox"/> Services | <input type="checkbox"/> Restaurant/Bar | <input type="checkbox"/> Armed services |
| <input type="checkbox"/> Other: _____ (please specify) | | |

Appendix B: Verbatim Kalispell Comments

The following are comments taken from the back page of the Kalispell Resident Attitude Survey. The comments are given verbatim. Only grammatical corrections have been made where necessary to facilitate understanding.

- Although my profession is retail, and tourism helps my work that does not mean we should base all jobs to tourism. We need to have good paying jobs other than service work to support our community. One way is to take advantage of our natural resources—logging, agriculture, fishing. Flathead Lake has the potential to be the best fisheries in all Northwest but is not taken advantage of. This would bring thousands of people to the valley.
- Tourism brings temporary low paying jobs. Montana needs to come into the 21st century. Technology sector jobs/strong educational system will benefit our population.
- Help preserve small businesses. Do not let urban sprawl & ugly malls destroy this pretty small town. Let the town speak for itself. Do not "develop" it.
- I have lived in many states in the US and find two overall problems that effect everyone's life style. They are: Planning and money—both are needed and both wanted. And they depend on 1) who is responsible for the planning and 2) who controls the money. And, the answer lies very simply in making certain that 1) where the money is raised, most of it should remain there and 2) when the plan effects a particular community, all in that community should have the major voice in the decision.
- Open Space—need to preserve existing and plan for additional open space as the city grows. Planning—need to have good planning that will allow growth. Need to approve the City/County growth management plan—citizens for a better Flathead need to be less involved in the city. Need to eliminate the control of Kalispell outside the city limits unless city services are provided. Central School Museum—need to promote, not fund—create alternatives for self-funding.
- The Flathead is turned in to Vale Co. with the price of rent & property. Already.
- I taught here over 40 years I am founder of Flathead Valley Community College.
- People have got to realize that we need growth. If we don't make progress we're standing still and letting the world pass us by. While the rest of the country made economic strides the people up here buried their heads and screamed "No Growth" so here we sit on the verge of poverty—Kalispell had pretty quick allow for growth and development or we're doomed!!!
- I feel Kalispell will benefit more from a good manufacturing facility than tourism, but the next best thing is tourism with a sales tax. The majority of tourists that visit (Montana in general) are surprised that they don't have to pay a sales tax. We're leaving money on the table! Thank you for letting me be part of your survey!
- I am answering these questions in relation to Kalispell and surrounding area. I do not live within the Kalispell city limits. I live in the Evergreen area, however, my address is in Kalispell.
- I am strongly in favor of moving the fairgrounds out of the city. It is too valuable of real estate to sit idle much of the year.
- I really believe that there are communities out there that we could be modeling our growth plan after. We could look at the mistakes of others, and look at the successes, also. One such community that is using an asset-based integration of all community agencies is Boise, Idaho. Also, Boulder, Colorado.
- There doesn't need to be marketing and advertising extensively for this area—our location by Flathead Lake, Big Mountain, and Glacier Park brings people. We need to concentrate on taking care of our local citizens—the tourists have money to spend—many locals don't.
- Whitefish has been successful in instituting a bed tax which has allowed them to make the kinds of improvements that attract tourists. I'd like to see Kalispell do the same. Developing Hwy 93 bypass is critical to improving the vitality of our downtown and city overall.
- I felt because of my occupation that some of the questions were difficult to answer, although I recognize the need, for increase in tourism will have an impact on our community which is good.
- I apologize for my late return on the survey. I am probably not a good candidate for answering. I live out of town, although I work in town and don't even go to the show more than 3 times a year. I grew up in C. Falls and also lived in Whitefish for 15 years so I know all three towns. Kalispell is the biggest so it has more shopping and accommodations but all the (3) cities should work together to improve the tourist industry. Kalispell has always seemed to be the "business city", Whitefish the "cosmopolitan" and C. Falls "blue collar". I can't separate myself from the three cities enough to make distinctions.

- Please really evaluate our comments and use our input to modify new laws and regulations that will affect us with respect to these issues.
- We need more entertainment for teenagers to do. Don't have a concert hall.
- We have some very serious crimes committed by tourists, homicide is at the top of the list—we cannot stop folks moving into the valley but who can we trust when they do move into the valley and our towns at an alarming rate.