

# Gateway to Glacier

The Emerging Economy of Flathead County



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Healthy Communities*



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MAY 2003

## ABOUT THIS REPORT

*Gateway to Glacier: The Emerging Economy of Flathead County* is a synthesis of three technical studies on Flathead County's economy conducted by researchers at The University of Montana. Unless otherwise cited, the data and other information supporting this report's findings are found in those three studies. The detailed technical studies are available to interested individuals on the Internet at [www.npca.org/healthycommunities](http://www.npca.org/healthycommunities). Or you may order copies of the three studies for the cost of reproduction by contacting the Northern Rockies office of the NPCA, P.O. Box 824, Helena, MT 59624, or call (406) 495-1560. E-mail: [northernrockies@npca.org](mailto:northernrockies@npca.org).

*The three studies synthesized in this report are:*

- *The Flathead's Changing Economy: Assessing the Role of National Parks in the Economies of High Amenity, Non-metropolitan Regions of the West*

LARRY D. SWANSON, Ph.D., Associate Director and head of the Regional Economy Program, O'Connor Center for the Rocky Mountain West, The University of Montana, Missoula. (2002)

Swanson undertook an extensive economic analysis of Flathead County to 1) identify and assess key trends and patterns of change, 2) evaluate the influence of Glacier National Park on the area economy, and 3) evaluate economic trends in other national park gateway communities around the western United States. This analysis is based on an evaluation of Flathead's economic characteristics and performance relative to "peer" counties throughout the West with similar economic and demographic profiles.

- *What the People Think - Glacier National Park and Vicinity*

NORMA NICKERSON, Ph.D., Director, Institute for Tourism and Recreation Research, The University of Montana, Missoula. (2002)

Nickerson surveyed opinion research focusing on Flathead Valley residents, and visitors to Glacier Park and the Flathead. Her report details specific characteristics that draw residents and visitors to the area, perceptions of change in the valley's natural environment, and concerns about the future.

- *Business Perspectives on the Flathead Economy, Conservation and Glacier National Park*

JASON LATHROP, Graduate student, The University of Montana, Missoula. (2002)

Lathrop interviewed 80 Flathead Valley business owners and managers from a broad spectrum of business sectors. His report explores business leaders' attitudes about the Flathead's changing economy, local communities, business environment, community leadership, Glacier National Park, and conservation.



**Grinnell Trail**

PHOTO: LARRY STOLTE

# Gateway to Glacier

## The Emerging Economy of Flathead County



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*The National Parks Conservation Association, established in 1919, is America's only private, nonprofit advocacy organization dedicated solely to protecting, preserving, and enhancing the U.S. National Park System for present and future generations by identifying problems and generating support to resolve them.*

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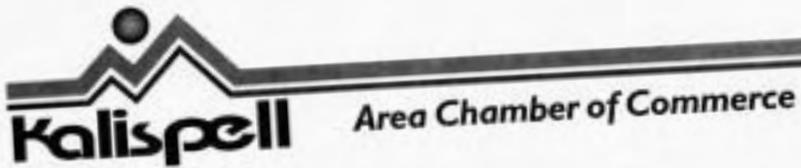


**Family fun on Glacier's  
Going-to-the-Sun Road**

PHOTO: KAREN NICHOLS

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A few years ago as a representative of the business community, I had a chance to share the same table with the National Parks Conservation Association (NPCA) on the Going-to-the-Sun Road Citizens Advisory Committee. At that table we blended diverse interests and developed a mutually acceptable solution for a difficult problem. The outcome was beneficial to the community and satisfying to participants.

Now it is time for community, conservation, and business interests to come to the table again to constructively contribute to the future of our beloved Flathead Valley. *Gateway to Glacier* provides an excellent place to start our discussions. This report makes the argument that we can maintain our small-town community character, grow a healthy economy, and conserve the natural treasures of our region. I believe these are goals we all share.

Let's not squander our resources. Our environment, our economy, and our community are treasures we can't afford to waste. Our time, our effort, and our good will are powerful resources we must use wisely. Cooperation is essential if we are to conserve the assets we treasure while accommodating the growth that these assets inevitably bring.

*Gateway to Glacier* points to the opportunity that comes with change. Those of us who live in the Flathead Valley have the chance to work cooperatively to harness change, to preserve both traditional values and achieve economic rewards. It will require mutual respect, a spirit of cooperation, hard work, and leadership.

I look forward to working with all of you.

A handwritten signature in black ink that reads "Susan D. Burch".

Susan D. Burch  
CHAIRMAN, KALISPELL CHAMBER OF COMMERCE  
OWNER, GLACIER PARK BOAT COMPANY

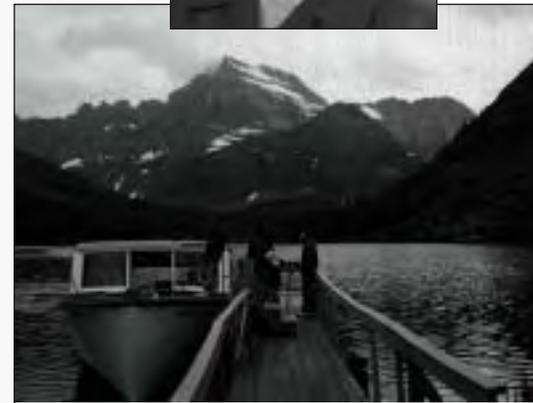


PHOTO: COURTESY  
GLACIER PARK  
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While much of rural America struggles with economic decline, the economy in Montana's Flathead Valley is growing, vibrant, and diversifying. The reason is simple: Its superb quality of life pays off in tangible economic benefits. Glacier National Park and other scenic public lands, clean air and water, and a friendly, small-town character are cornerstones of this quality of life.



**Main Street, Kalispell**

PHOTO: KAREN NICHOLS

In 2002, the National Parks Conservation Association (NPCA)—through its Northern Rockies regional offices located in Whitefish and Helena—commissioned three separate studies to explore the roots of economic vitality in Flathead County, the primary “gateway” to Glacier National Park.

*Gateway to Glacier: The Emerging Economy of Flathead County* synthesizes the findings of these three studies to document how the Flathead's economic vitality is directly tied to Glacier Park and the region's natural environment and small-town character. It argues that many of the valley's most attractive qualities are at risk. And it points the way toward a collaborative approach to protect these valuable assets for the future.

Some say that the Flathead has been discovered, and this is probably the plainest way to explain the changes of the past decade. The attraction of Flathead County, its communities, and the surrounding landscape is obvious to long-time residents, newcomers, and first-time visitors alike.

Many valley residents fear that this “discovery” has brought rapid change that will erode what they value most about their home. Yet in this transition are opportunities to protect the qualities and characteristics that make this a uniquely wonderful place to live—and that are at the heart of the valley's economic vitality.

*Gateway to Glacier* explores the challenges and the opportunities within the county's economic transition. Its key findings about the Flathead's emerging economy are briefly described in this executive summary and explored greater in the six chapters that follow.



**Two Medicine Pass trail**

PHOTO: LARRY STOLTE

## 1. The Flathead County economy is vibrant, diverse, and growing.

By virtually any economic indicator, Flathead County is booming.

- In the last decade, 15,700 new jobs were created, an increase of nearly 50 percent. Dramatic increases occurred in relatively high-quality employment areas such as health care, business services, construction, and new areas of manufacturing.
- Population grew 26 percent between 1990 and 2000, led by an influx of new residents.
- Nearly 1,000 new businesses were established in the last decade, a 44 percent increase in local employers that marks a boom in entrepreneurial activity.
- Unemployment rates are the lowest in three decades.
- Per capita income rose by 13 percent in the last decade (up from nine percent in the '80s). Poverty has declined. And median income sharply increased, erasing losses in the previous decade.

The Flathead's economic vitality is largely fueled by an influx of new residents. But the numbers also tell a story of an economy in transition, more diverse and more stable than before, providing higher-paying jobs. Within this transition is the opportunity to direct economic development to sustain a vibrant economy, whether or not the population boom continues.

## 2. The quality of the Flathead Valley's spectacular natural environment is its chief economic asset.

Surveys and interviews with Flathead County residents, visitors, and business leaders confirm that the valley's chief appeal is the place itself: The small-town, friendly atmosphere, access to the outdoors and recreational opportunities, scenic beauty, clean water, wildlife, and the open, natural setting. These qualities are key economic assets because they draw people to visit, to live, and to stay in the area. Most business leaders interviewed believe they could make higher incomes elsewhere but choose to operate in Flathead County largely because of the quality of life.

Nationwide economic and technological trends have made it easier for people to live where they want. The Flathead's booming population is a sign of the area's undeniable attractiveness—and a confirmation that the quality of life is the area's chief economic asset. It is what draws people, income, jobs, and businesses here.

## 3. Glacier National Park is an anchor for Flathead County's robust economy.

In a county blessed with a spectacular natural setting, Glacier National Park is the centerpiece. It is one of Montana's two most popular attractions for visitors, and tops the list of places local residents take out-of-town guests. The icon for nearly 200 business names and logos, Glacier also shows up on signboards for hundreds of millions of dollars of high-profile development, including a proposed mall, a performing arts center, and the redeveloped Big Mountain ski village. Glacier's appeal spans the globe, and it was voted America's best backcountry park by readers of *Backpacker* magazine. Meanwhile, Kalispell was selected in 1999 as America's "best mountain town" by *Mountain Sports & Living Magazine*, which cited its proximity to Glacier Park.



**Soaring high over the Flathead Valley**

PHOTO: KAREN NICHOLS

**Grinnell Lake in the Many Glacier Valley**

PHOTO: KAREN NICHOLS

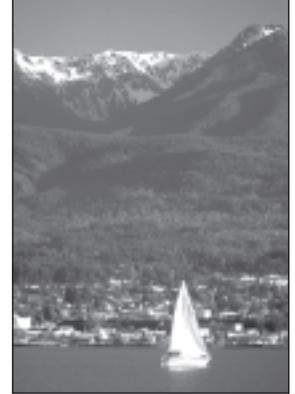


#### **4. Proximity to national parks is an economic advantage for gateway communities such as Flathead County.**

An assessment of national park gateway communities around the West shows that Flathead County's booming economy reflects a much larger pattern.

Attracted by small, friendly communities and appealing landscapes, many Americans turned their attention from major metropolitan areas and traditional retirement havens during the 1990s.

Rapidly growing populations in communities adjacent to national parks throughout the West suggest the special appeal of these places. This appeal has translated into economic vitality for gateway counties such as Flathead, which tend to have richer, more diverse, and more thriving economies than do similar counties that are not gateways. In these counties, tourism is but one piece of a rapidly expanding economic pie. Economic growth has been driven largely by the people who live in these gateway communities and by local businesses



**National Park gateways like Port Angeles, Washington, enjoy strong economic growth**

PHOTO: VALERIE HENSCHEL



**Fixing Going-to-the-Sun Road and increasing funding for park operations will protect a major economic asset**

PHOTO: KAREN NICHOLS

#### **5. The Flathead Valley's most valued qualities and primary economic assets are at risk.**

Many local residents believe that the valley is losing some of its special qualities, most notably its rural, small-town character, farmland, and open spaces. Returning visitors to Glacier National Park have noted declines in the condition of the natural environment, wildlife viewing opportunities, and the amount of open space. NPCA has listed Glacier as one of America's most endangered parks three times because of severe funding shortfalls, dilapidated infrastructure, and the encroachment of haphazard development on wildlife habitat outside the park.

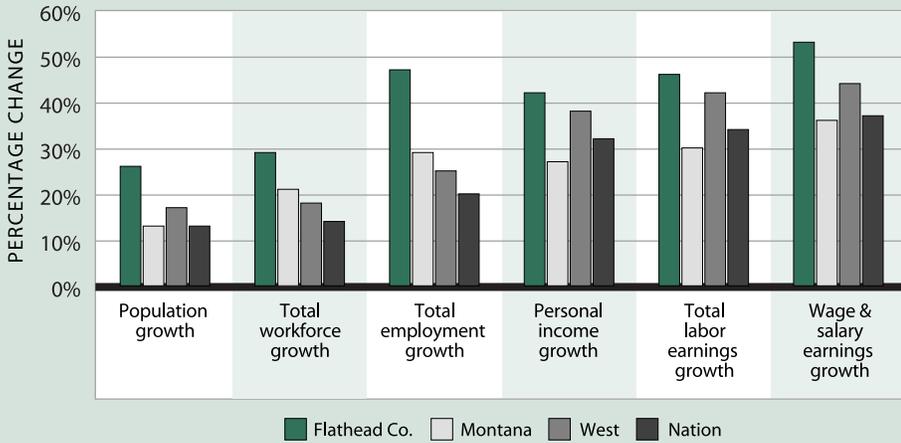
#### **6. Flathead communities must encourage high-quality economic growth and development.**

The Flathead economy is in transition. Today's growth provides the opportunity to retool the economy so it remains strong and diverse, whether or not the population boom continues. Flathead County has enjoyed great success in creating jobs and attracting development and investment. The valley's communities must now create a clear strategy and focused initiatives to improve the well-being of Flathead residents and protect the area's most vital economic assets.

This focus will help Flathead County maintain the quality of life that old-timers, newcomers, and visitors find so appealing. High-quality economic development means maintaining water quality, wildlife habitat, an appealing landscape, and the valley's friendly small-town character. It means retaining working farms and forests, cultivating jobs with pay and benefits that can fully sustain workers and their families, and investing in a well-educated local workforce. Economic growth can be guided to support and protect the values that drive it, rather than leading inexorably to their erosion and loss.

FIGURE 1.

**Comparisons of Economic Growth in the '90s**



Note: Total workforce refers to the total number of adults with jobs, while total employment refers to all jobs, both full- and part-time. Total labor earnings include both wage and salary earnings and self-employment income or proprietor earnings. The "West" includes the 22 contiguous states west of the Mississippi River. Dollar amounts are inflation-adjusted to 1996 dollars. (Sources: U.S. Bureau of Labor Statistics, U.S. Department of Commerce)

**Investing in the Future**

The families, businesses, and communities of Flathead County have been blessed with one of the most spectacular natural environments in North America. These natural amenities have become the area's chief economic asset. Flathead residents recognize that, along with small, friendly communities, these characteristics are largely responsible for the quality of life and economic vitality they enjoy.

This recognition can form a solid foundation for community dialogue and cooperative action to protect and enhance these fundamental assets. Partnerships of many kinds will be indispensable if Flathead residents are to guide growth to protect the values they cherish. With Glacier National Park and other public lands so directly linked to the valley's economic health, collaboration between public lands managers and communities is essential to sustain the appeal at the heart of the Flathead's economic vitality.



**Glacier is a lure for outdoor enthusiasts**

PHOTO: COURTESY BIG MOUNTAIN RESORT, WHITEFISH, MONTANA



**Glacier National Park forms the headwaters of the Flathead River**

PHOTO: KAREN NICHOLS

## INTRODUCTION

### Floating and fishing at Glacier's Lake McDonald

PHOTO: KAREN NICHOLS



“You can't measure the mark Glacier Park has made on this community. The whole economy is tied to the park.”

**Carol Edgar**  
Executive Director,  
Flathead Convention  
& Visitor Bureau

Around the turn of the 19th century, proposals to create Glacier National Park met with considerable resistance in the Flathead Valley. Opposition was deep and broad, including several Flathead County newspapers that cited lost opportunities for mining, logging, new railroad routes, oil exploration, hunting, and homesteading.

“There may be some local people who favor the park plan,” wrote the *Kalispell Daily Inter Lake* in 1907, “but we know of only two.” The *Inter Lake* and other local papers voiced the concerns of many Flathead residents who feared that establishing the park would take the wind out of the area's economic sails.<sup>1</sup>

Nearly 100 years later, it is clear that these fears were unfounded. In an October 2002 editorial, the *Daily Inter Lake* called Waterton-Glacier International Peace Park “our region's biggest economic engine.”<sup>2</sup> As in the past, the editorial staff voiced the convictions of residents, many of whom believe that the valley's economic vitality depends in large measure upon its spectacular natural surroundings.

In a region replete with extensive wilderness areas, national forests, lakes, streams, and mountains, Glacier National Park holds a special place. It is a landscape of exceptional beauty, known around the world and easily accessible by car, foot, and horseback. Carol Edgar, executive director of the Flathead Convention and Visitor Bureau, expressed a view common among local business leaders: “You can't measure the mark Glacier Park has made on this community. The whole economy is tied to the park.”

Across the United States, there is growing recognition of the link between attractive public lands such as national parks, and the well-being of the communities that provide access to them. These “gateway communities” generally provide food, lodging, and other services for visitors. But the parks are more than simple magnets for visitors. Many gateway communities, including Flathead County, have thriving, diverse economies that are not primarily dependent upon tourism and recreation. Yet the natural appeal of these areas is at the heart of their economic success.

In 2002, NPCA—through its Northern Rockies regional offices located in Whitefish and Helena—commissioned three studies (see About This Report). These studies explore the roots of economic vitality in Flathead County, the primary gateway to Glacier. From three different angles, the studies help to illuminate important relationships among economic vitality, the natural environment, and the quality of life that is valued by both residents and visitors. These studies overwhelmingly support the assertion that the Flathead Valley's chief economic assets are its friendly communities and the natural environment, which provides recreational opportunities, a wide-open feel, clean water, wildlife, and scenic beauty. Further, the studies support the conclusion that degrading those qualities will, in the long run, slow economic progress and dampen vitality in the Flathead. They point the way toward protecting these valuable assets for the future.

This report synthesizes findings of these three studies into a wide-ranging discussion of economic transition that will help residents and leaders navigate fast-paced changes in the emerging Flathead economy.

## The Flathead County economy is vibrant, diverse, and growing

Over the last 30 years, the Flathead County economy has changed tremendously. Industries that were once economic staples have declined in importance, and this economic restructuring has been sometimes painful and divisive. A nationwide recession in the early 1980s compounded the effects of contractions in natural resource industries such as lumber and wood products, and the valley felt the pinch.

Unlike many other rural areas still struggling with economic declines, Flathead County experienced a remarkable turnaround beginning in the late 1980s. Employment and income growth accelerated, driven in large measure by a rising tide of new residents. During the 1990s, dramatic growth occurred primarily in health care, specialized services, retail trade, and construction, more than filling the gaps left by the setbacks of the 1980s. Overall, manufacturing grew at a marginal pace, and now accounts for a much smaller share of the fast-growing economy.

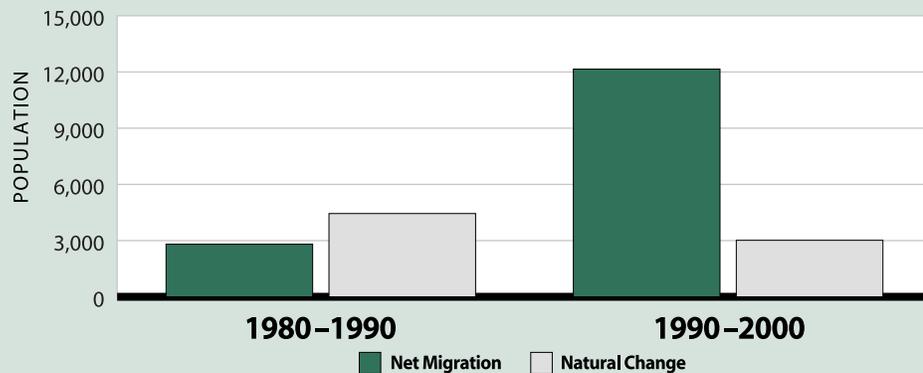
The Flathead County economy is vibrant, diverse, and growing. In many ways, the valley's economic expansion is linked to its increasing population. These new realities call for a new understanding of the roots of prosperity in the Flathead.



**Whitefish enjoys a vibrant economy and a strong community identity**

PHOTO: KAREN NICHOLS

**FIGURE 2. Flathead County Population Change by Major Component: 1980s vs. 1990s**



Note: *Net migration* is the difference between the number of persons moving to an area and the number moving away, and considers only persons changing their permanent residence. *Natural change* is the difference between the number of births and the number of deaths. (Source: U.S. Census Bureau, "Components of Change")

### A Growing Population

In the 1990s, Flathead County's population shot up by 26 percent, nearly double the rate of growth in the '80s. The 2000 census counted 74,471 residents. A more recent July 2001 estimate places the county's population at more than 76,000.

Population growth comes in spurts in the Flathead. Growth spiked in the late 1970s and again in the mid-1980s. The early and mid-1990s brought a more sustained growth trend, and now it seems that population growth may be on the increase again. In the '70s and '80s, the "natural change" of births and deaths was the biggest influence on the rate of population growth. In contrast, population growth in the '90s was driven largely by people moving into the valley.

### Flathead County Courthouse, 101 years old

PHOTO: KAREN NICHOLS





**Joe Unterreiner**, Kalispell

“Unlike Las Vegas, people don’t move here primarily for the job opportunities. We see people attracted to this area for its outstanding natural amenities, good schools, and small-town environment. It’s a beautiful place to live. Many explore starting or acquiring a business as a way of making the transition to the Flathead. Or, maybe they bring an existing business with them. We’re also seeing displaced workers return to school for retraining, then decide to start a business.

So I’d say the Flathead is enjoying a high level of entrepreneurial activity right now. A lot of people are taking a risk, putting capital on the line and making an investment, because they want to live here. And these are some very creative, enterprising people who often invent a market for their products or services.

Fortunately, the Flathead is a good place to do business, especially when you look at other places around the country. We enjoy a strong business environment. And that’s why you see a tremendous amount of capital at risk in the valley right now.”

**Joe Unterreiner**  
President, Kalispell  
Chamber of Commerce

## Who is Moving to the Flathead?

By the end of the 1990s Flathead County’s population had ballooned, with the greatest growth among persons between their early 40s and mid-60s. This pattern reflects the aging population nationwide. The large and economically influential segment of “baby boomers” is now between the ages of 40 and 60. Financially established, boomers make up the bulk of the people moving to places like the Flathead Valley.

In addition to this rapidly growing population of older, working adults, the Flathead experienced a significant increase in the number of teenagers during the ‘90s, reflecting an influx of established families. The Flathead seems to have attracted many people who feel comfortable enough financially to live where they want, and who bring with them jobs, income, or the capital to start new businesses.

“Transportable” sources of income such as investments and transfer payments are increasingly important here. Unlike most wage earnings, these income sources move with people when they relocate. In 1977, wage income was 70 percent of all income received by individuals and households in Flathead County. Now, although labor earnings continue to grow, they account for only 60 percent of the total. Income from investments (24 percent) and transfer payments (15 percent) make up the rest. Investment income is received primarily as rent, dividends, capital gains, and interest earnings. Transfer payments are mostly from Social Security, Medicare, and Medicaid, which tend to rise with an aging population.

## Business is Booming

Flathead County’s rapidly growing population is an important driver of the area’s economic vitality. More people and more income have translated into more business activity and continuing job growth.

At the end of the 1990s, 980 more firms—not including sole proprietorships—were doing business in the valley than at the beginning of the decade, a 44 percent increase.<sup>3</sup> Employers created 15,700 new jobs during the ‘90s, a 47 percent increase. Per capita income and total personal income (all income received by individuals and households) grew significantly. Wage and salary labor earnings also increased at a faster rate than they did across the country and throughout the West.

Business leaders interviewed for this report generally agreed that the area’s growing population has been good for the economy. A majority said that growth has brought increased prosperity to their businesses, while others described business as stable. Not a single respondent reported a decline.

Another sign of vitality in the Flathead economy is the amount of capital being invested in residential, commercial, recreational, and industrial construction projects. “All enterprise starts with risk, and right now there’s a tremendous amount of capital at risk in the valley,” observed Kalispell Chamber of Commerce President Joe Unterreiner. As 2003 began, the chamber calculated that more than \$1 billion was being invested in major construction projects across the county.

The Flathead Valley also is becoming known for its thriving arts community. Whitefish, Kalispell, and Bigfork are three of the country's top 100 small art towns according to a 1998 book, *The 100 Best Small Art Towns in America*. Artists, musicians, and crafters directly contribute to the economy and are an indispensable element in the unique appeal of the Flathead's communities.

**With Glacier as a backdrop, Columbia Falls remains an industrial hub of Flathead County**  
PHOTO: JACK ARCHIBALD

### An Economy in Transition

The Flathead economy is changing. Manufacturing—including lumber and wood products, metals, and high-tech—has become less important overall. Labor earnings and the number of manufacturing jobs rose slightly during the 1990s, but manufacturing's share of total labor earnings in the county fell from 32 percent to 18 percent between 1980 and 2000, signaling a major shift away from the area's long-standing dependence on this industry. Another mark of change is that different types of manufacturing are becoming more important in the valley. In the last decade, labor income gains in equipment manufacturing exceeded losses in wood products manufacturing by more than double.



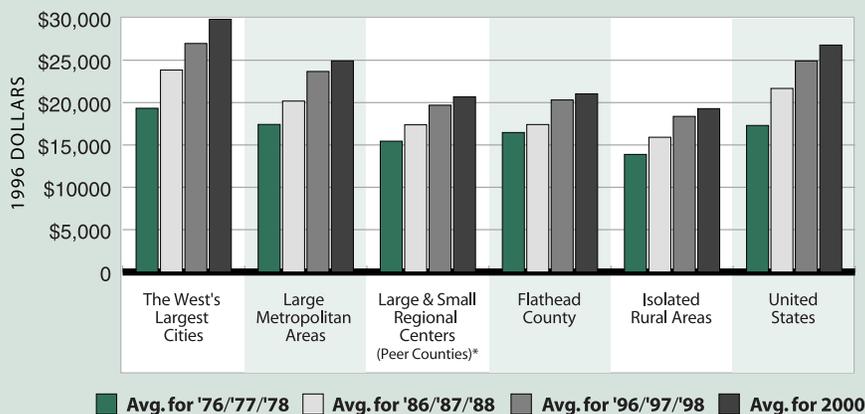
FIGURE 3. **Per Capita Income: How is Flathead County Faring?**

In 2000, Flathead County's per capita income was \$23,142. The national average was \$29,469. Does this mean that Flathead County is a "poor" area? Not necessarily.

As the chart demonstrates, per capita income levels tend to be considerably—and consistently—higher in large cities and urban areas than in rural ones. Since most people in the United States live in large cities and their surrounding areas, national per capita income is much higher than in less-populated places like Flathead County and in states, like Montana, that have no large cities.

But areas like the Flathead are starting to gain ground. Across the United States, per capita income grew most quickly in the largest cities during the 1970s and 1980s. During the 1990s, that pattern began to shift, with some of the greatest gains in per capita income happening in smaller cities.

Compared with its peers, Flathead County's per capita income is slightly above average (see chart). As per capita income growth slowed down across the United States during the late '80s and early '90s, Flathead County's economy was on the upswing. Per capita income grew more quickly here than in the rest of the country, and more quickly than the average among its peer areas. This is a sign that the current economic transition is boosting prosperity in the Flathead Valley.



Note: All figures are adjusted for inflation and translated into 1996 dollars to provide true comparisons over time. Data for the West's largest cities include the region's 28 largest cities including Los Angeles, San Francisco, Dallas-Ft. Worth, and Seattle.

Large metropolitan areas include 28 cities the next tier down in size, including Albuquerque, Spokane, Eugene, Boise, and Yakima. Large and small regional centers are the next tier smaller in size and include larger regional centers like Sioux City, Flagstaff, Grand Junction, and Missoula, and smaller regional centers like Port Angeles, Mankato, Bozeman, and Kalispell. Isolated rural areas are counties having no cities greater than 10,000 population that are not near larger regional centers and cities.

(Source: Swanson, *The Flathead's Changing Economy*, October 2002)

\* Peer counties are 67 counties in the western United States with similar characteristics to Flathead County, including population size and proximity to major urban centers. All of these counties have no cities exceeding 50,000 population ('90 Census).

Per Capita Income Change	PERCENT CHANGE	
	'77-'87	'87-'97
The West's Largest Cities	+23%	+13%
Large Metropolitan Areas	+16%	+17%
Large and Small Regional Centers (Peer Counties*)	+13%	+13%
Flathead County	+6%	+17%
Isolated Rural Areas	+15%	+16%
United States	+25%	+15%

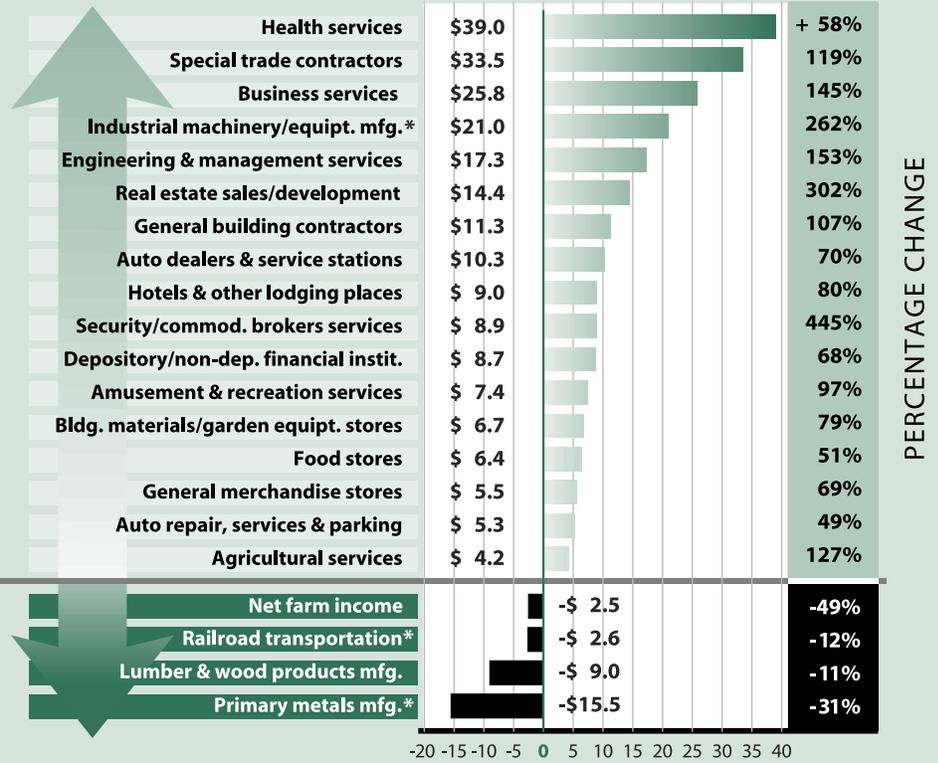
FIGURE 4.

**Rapidly Growing and Declining Sub-sectors in Flathead County**

**1990 - 2000**  
Change in millions of 1996 dollars

**Fastest-growing Sub-sectors**  
(gains of more than \$4 million & 40%)

**Declining Sub-sectors**  
(losses of more than \$1 million)



Note:  
• Change in these sub-sectors is measured in terms of labor earnings received by sub-sector workers, in inflation-adjusted 1996 dollars.  
• Estimates for 1990 are 3-year averages for '89, '90, and '91, while estimates for 2000 are 2-year averages using '99 and '00 data from the U.S. Department of Commerce.  
(Source: Swanson, *The Flathead's Changing Economy*)

\* Sub-sector change estimated because some data were suppressed or not available.

The primary source of new jobs and labor income has been a rapid expansion in the services, retail trade, construction, and F.I.R.E. (finance, insurance, and real estate) sectors, particularly in areas directly influenced by the expanding population. During the 1990s, these sectors accounted for more than 70 percent of the labor earnings growth in the valley.

During the 1980s, services and retail trade alone accounted for 85 percent of the new jobs created in Flathead County, causing many to be concerned about quality jobs and the area's future. The '90s, however, were marked by strong growth in other sectors, which held job growth in services and retail trade to around 57 percent of all employment growth. These other growing sectors provide balance and diversity in the overall economy, lending stability and resilience.

In the service sector, growth during the '90s has been particularly strong in sub-sectors that typically offer many high-quality jobs: Health care, engineering and management services, and business services such as computer programming, data processing, advertising, credit reporting, and printing.

The Flathead's popularity among visitors and part-time residents also adds vitality. In terms of labor earnings, two of the fastest-growing sub-sectors in the '90s are strongly related to tourism: Hotels and lodging places (#9 fastest-growing sub-sector) and amusement and recreation services (#12). In many trade and service sectors, labor earnings have grown faster than area population and income, suggesting the growing influence of part-time residents who spend time and money in the area. In the construction sector, for example, disproportionate growth in labor earnings indicates a boom in second-home building, a trend that is otherwise difficult to document.

**Swimmers enjoy the sparkling waters of Flathead Lake**

PHOTO: KAREN NICHOLS



FIGURE 5.

**Recent Improvements in Economic Well-being in Flathead County**

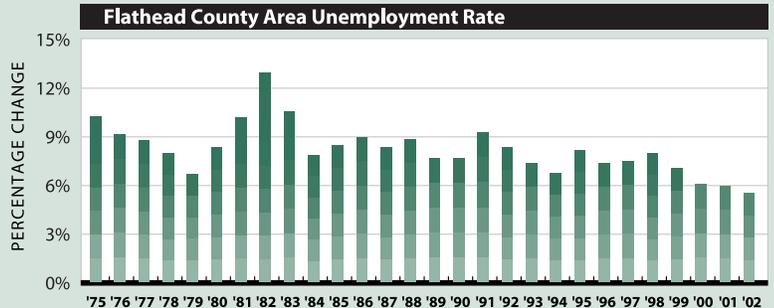
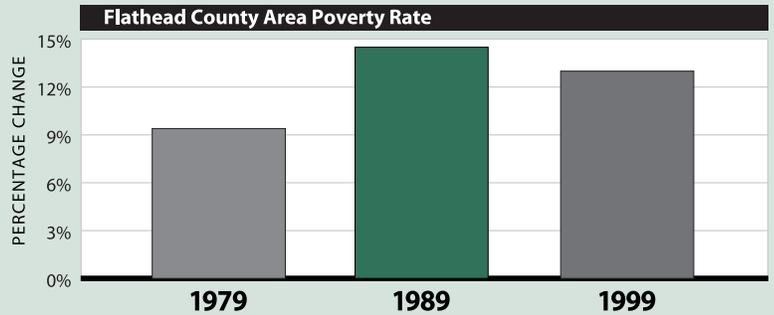
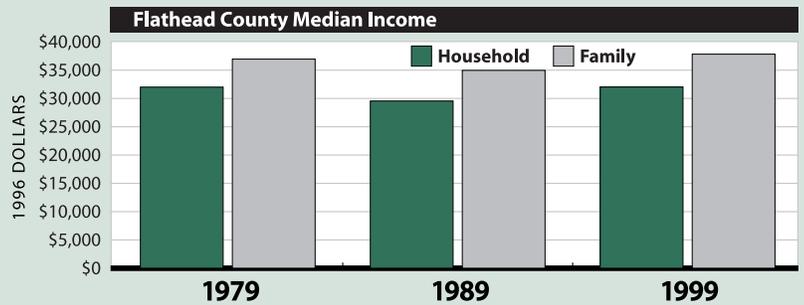
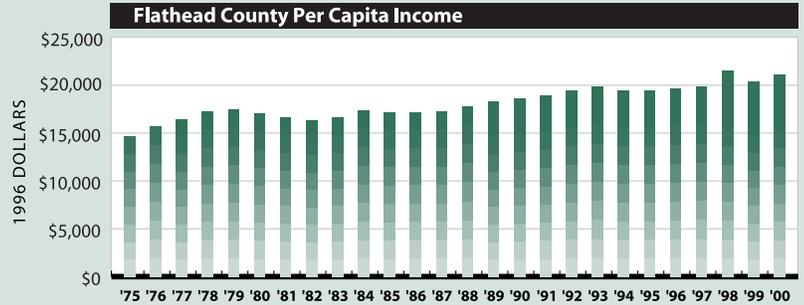
Tourism continues to be a stable and growing industry in Flathead County, but some measures of tourism activity suggest it may make up a shrinking piece of the rapidly growing economic pie. While part-time residents play an expanding role in the economy, non-resident tourist spending seems to have declined in relative importance in the 1990s. For example, while labor earnings in the Flathead economy grew nearly 50 percent in the past decade, lodging revenue for Flathead establishments grew by only 29 percent, as reflected in bed tax receipts. This difference suggests that much of the Flathead's economic expansion is taking place outside what is commonly thought of as tourism.

**Signs of Qualitative Growth**

Flathead County has been experiencing rapid “quantitative” growth. More people, more jobs, and more income have helped ease the valley’s economic transition. Growth has provided alternatives to extractive industries and traditional manufacturing, which are also declining in economic importance throughout the United States.

However, quantitative growth does not automatically translate into improvements that enhance prosperity and well-being for area residents. In the valley, fortunately, evidence exists of “qualitative” growth. While the 1980s brought economic setbacks in Flathead County, these declines reversed in the 1990s, with gains in per capita income and median income and declining rates of poverty and unemployment.

**By nearly all measures, the quality of economic life in the Flathead is improving. Per capita income is steadily rising, median income is recovering after losses in the '80s, poverty is falling after rising in the previous decade, and unemployment is at a 30-year low.**



(Source: U.S. Bureau of Economic Analysis, Census Bureau, and Bureau of Labor Statistics)

## FINDING 2



**Flyfishing on the North Fork of the Flathead River**

PHOTO: KAREN NICHOLS

### The quality of the Flathead Valley's spectacular environment is its chief economic asset

Changes in Flathead County's economy, driven by the area's growing popularity with new residents and visitors, invite a new interpretation of the valley's most important economic assets. The qualities that attract newcomers and visitors are the same ones that long-time residents most value about the Flathead Valley.

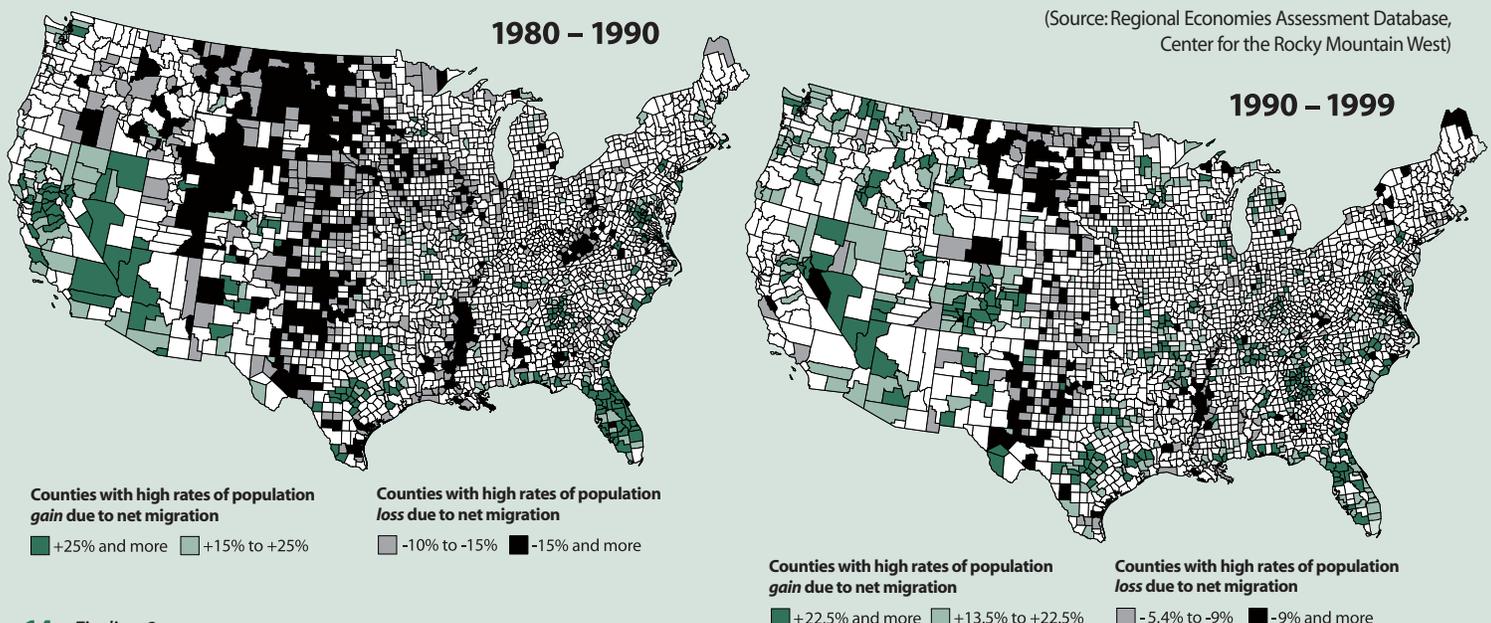
#### Changing Migration Patterns

Increasingly free to choose where they want to live, many people pursue the quality of life found outside of major metropolitan areas and traditional retirement havens. During the 1990s, patterns of migration shifted nationwide, reflecting this trend.

During the 1980s, the Plains region and parts of the Rocky Mountain West lost population as many people moved away. By contrast, in the West, California, Nevada, Arizona, and a handful of major metropolitan areas attracted new residents. In the East, Florida was the main magnet for people moving to a new area. In the '90s however, this pattern of concentrated population growth shifted. Population gains through migration are now much more dispersed.

During the 1990s in the Rocky Mountain West, a dramatic increase in new residents marked a sea change in migration patterns. Like the Flathead, many of the high-growth areas in the West are non-metropolitan, with relatively small population centers. Throughout the region, national park gateway communities like Flathead County are focal points for growth. More and more, people make decisions about where to live based in large part on the presence of natural "amenities"—appealing qualities or characteristics that add value—such as spectacular scenery, accessible public lands, and clean air and water.

FIGURE 6. Population Change Through Migration in the U.S.: 1980s vs. 1990s



## The Flathead's Key Assets

In surveys and interviews, visitors, new residents, and lifelong community members identify a common core of qualities that attract them to the Flathead Valley. For these people, the valley's unique appeal lies in the small-town character of the communities and the quality of the natural environment. Visitors and residents alike are drawn by the friendly atmosphere, rural feel, clean water, wide-open spaces, wildlife, scenic beauty, and outdoor recreation opportunities.<sup>4</sup>

While visitors are important to the economy, valley residents are at the heart of the Flathead's economic vitality. The valley's natural and recreational amenities play a large part in attracting new residents and businesses while maintaining the loyalty of long-time residents. In a recent survey of Montanans, Kalispell residents expressed a higher degree of attachment to their hometown than do most Montanans.<sup>5</sup>

Most business people in the Flathead Valley say they are drawn here primarily by the quality of the community and surrounding landscape. Most of the business owners and managers interviewed for this report believe they could make more money elsewhere. They see themselves trading greater income opportunities for the quality of life they value so highly.

Of the 80 business leaders interviewed for this report, 13 were native to the Flathead. Most of the others had moved to the Flathead Valley for reasons that centered on lifestyle, outdoor recreation, scenic beauty, and family.

The Flathead Valley's natural and recreational amenities are well appreciated across the country. A 2001 study asked Internet users to identify the images that come to mind

when describing a Montana vacation. The top three vote getters—natural beauty and scenery, mountains, and national parks—describe the Flathead Valley perfectly.<sup>6</sup> In 1999, *Mountain Sports & Living Magazine* selected Kalispell as America's "best mountain town," citing its proximity to Glacier Park and its "quaint, laid-back business district."

In today's economy, jobs and income tend to follow people, rather than the other way around. Flathead County's ability to attract and maintain the loyalty of full-time residents, as well as visitors, is critical. The character of the local communities and beauty of surrounding landscapes are the county's most important assets.



**Tom Krustangel**, Whitefish

"I don't know that anyone can adequately explain what led them to Montana. There is a magic here. I know the first time I set eyes on Glacier Park, I was absolutely awestruck. I had never seen anything so magnificent in all my life. I vowed right then and there to come back and sure enough. It took a few years, but now I have a successful business and I'm right where I want to be.

I love this valley. I love the people in it. I'd hate for us to look like Anytown, USA, with garbled, jumbled zoning. There is a character to this area that I hope we're smart enough to preserve. We as Americans have a bias to look at short-term profit rather than long-term growth, but I think there's a will here to keep our valley special."

**Tom Krustangel**

Owner, Montana Tom's  
Chocolate

### The New Economy:

#### Where Jobs and Income Follow People

Behind the growing number of new Flathead residents and businesses are some nationwide trends that make it easier for people to choose where they live.

- The U.S. economy overall is less dependent on jobs in manufacturing and other large industries tied to a particular location. The shift to a more service-oriented economy has made business more mobile. Nationwide, job growth has been focused over the past decade in small firms, which have greater flexibility in location.
- Investment income is a larger share of overall personal income. Thirty years ago, 80 percent of the U.S. income base was labor earnings. Now, in many places, less than 60 percent of personal income comes from wages and salaries. The rest comes from investments and transfer payments, which are more transportable than wage income, giving people more freedom to live where they want.
- Improvements in information technology have fundamentally changed how business is conducted. These advances make it possible to work from home offices or run global businesses from remote locations.

“In Colorado a lot of the natural areas have been kind of taken over by sort of a trendiness. It’s like Rocky Disneyland or something. And Montana is like Montana. It’s a real deal place. There’s still a sense of a real daily life, not a kind of a recreation tourist daily life.”

—Minnesota man vacationing in Montana

(The Montana Vacation Experience, Institute for Tourism and Recreation Research, 2002)

## The Wildest Assets

Visitors and residents share a deep appreciation of the wildlife inhabiting the valley and surrounding mountains. The majority of residents believe that large predators such as grizzly bears, mountain lions, and wolves play an important role in the natural systems they occupy.<sup>7</sup>

Hunting, fishing, and wildlife watching are popular pastimes among people who live in the valley. According to John Fraley at the Montana Department of Fish, Wildlife and Parks, “Northwest Montana has the highest rate of hunting and fishing by both men and women in the entire United States outside of Alaska.” Some 40 percent of Northwest Montanans hunt, nearly six times the national average. Sixty percent fish, which is more than triple the national average. And nearly half of those surveyed say they go out to view or photograph wildlife.<sup>8</sup>

Among visitors who spend at least one night in Flathead County, wildlife watching ranks as the most popular activity. Fifty-three percent of overnight visitors surveyed noted this as something they did during their stay. Other popular activities included nature photography (44 percent), day hiking (43 percent), and camping (29 percent).<sup>9</sup>

Biologist Chuck Jonkel leads another bear watching field trip

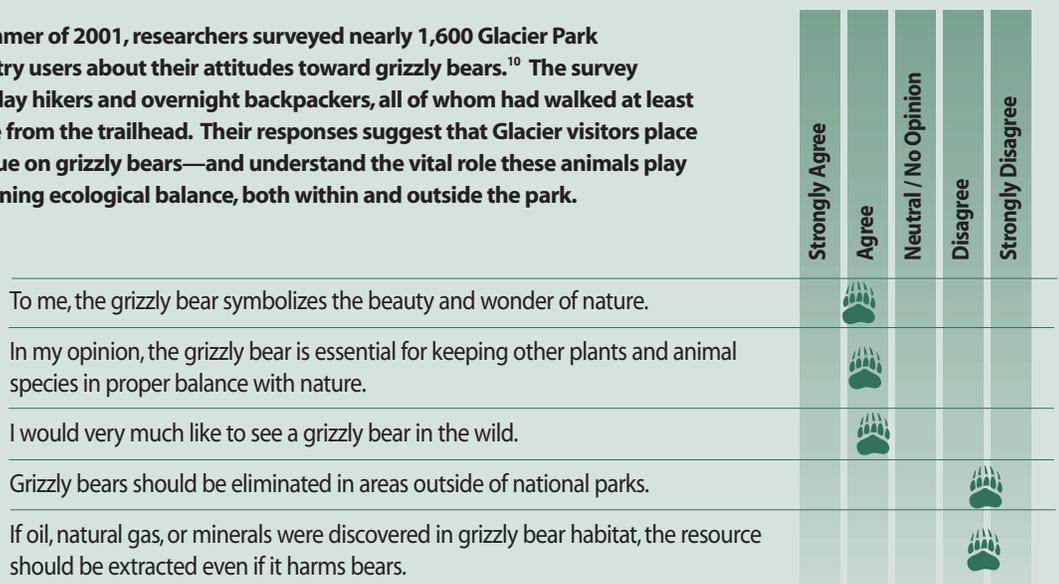
PHOTO: KAREN NICHOLS



Figure 7.

## Bears in the Backcountry: User Attitude Survey

In the summer of 2001, researchers surveyed nearly 1,600 Glacier Park backcountry users about their attitudes toward grizzly bears.<sup>10</sup> The survey included day hikers and overnight backpackers, all of whom had walked at least a half mile from the trailhead. Their responses suggest that Glacier visitors place a high value on grizzly bears—and understand the vital role these animals play in maintaining ecological balance, both within and outside the park.



## Glacier's Grizzlies

Joan Grote, who directs the Mars-Stout call center for the Flathead Convention and Visitor Bureau, knows what people are looking for when they visit this area. Running through the top attractions for visitors, Grote ended her list by noting, “And of course, everyone wants to see a bear.”

In reality, Flathead residents and visitors alike seem to have a healthy respect for the great bear. Some believe that seeing a grizzly in the wild would be a peak outdoor experience for them. On the other hand, many people are glad to know the great bear is around, but would rather not encounter one in the woods. Among both camps, however, there is widespread agreement that grizzlies are a key element of the natural systems they occupy. Seen or unseen, grizzlies are an important part of the Glacier experience—a sign of wildness and ecological integrity.



**Viewing wild bears is a favorite activity of Glacier park visitors, but rangers recommend taking photos from a safe distance. This close-up photo of a captive bear was taken at a licensed Montana facility.**

PHOTO: KAREN NICHOLS

## Iceberg Lake cirque

PHOTO: NPCA



**Velinda Stevens**, Kalispell

“Conservation affects the attractiveness of the area and the kinds of people we recruit to the Flathead Valley. We have been able to attract and retain an outstanding medical staff because this is such a nice place to live. And you know those things that make it a nice place to live—clean air, water quality, Glacier National Park, the wildlife—all the reasons that people live here, they want to keep.

Glacier is a big part of why I choose to live here. The hiking is spectacular. I like that there’s nothing ostentatious about the park. I like the wildlife, how accessible it is. There isn’t anything I don’t like about the park. It’s a huge part of our valley’s quality of life, and the quality of life is why our economy is growing. Our challenge is to make sure we protect these qualities for the long term.”

**Velinda Stevens**  
Chief Executive Officer  
Kalispell Regional  
Medical Center

### Glacier National Park is an anchor for Flathead County’s robust economy

In the late 1800s and early 1900s, prospectors searched for everything from gold to copper to oil in what we know today as Glacier National Park. Countless prospectors and speculators believed they would make their fortunes there. Hundreds of mining and oil claims were staked out, but the hoped-for booms turned to bust.

The real “gold” in Glacier was protected on April 11, 1910, when President Taft signed the bill creating Glacier National Park. The mountains, forests, wildlife, and clean waters were protected for posterity. With an initial appropriation of \$15,000, crews prepared a few roadways and trails for the first season of visitors, and the park rapidly became a popular destination for travelers.<sup>11</sup>

Glacier Park has become Flathead County’s most pervasive icon, a widely recognized anchor for the region’s many natural amenities, and a primary attraction for residents, visitors, and business leaders alike.

#### This is Glacier Country

Glacier National Park runs neck-and-neck with Yellowstone as Montana’s number one attraction for vacationers. More than 80 percent of vacationers in Flathead County say Glacier was one of the attractions that drew them here.<sup>12</sup> Every year, Glacier is visited by people from every U.S. state and territory, from every Canadian province, and from nations around the globe.

Glacier’s single most popular attraction is Going-to-the-Sun Road, with more than three-quarters of park visitors enjoying the spectacular scenery, wildlife viewing, and fresh alpine air at Logan Pass.<sup>13</sup> The park is just as well known as a premier hiking destination. Two-thirds of prospective park visitors surveyed planned to hike on some of the park’s many trails.<sup>14</sup> In 2000, readers of *Backpacker* magazine selected Glacier as America’s best backcountry park.

The park is beloved by Flathead residents, as well. Glacier National Park is the most popular place for Kalispell residents to take people who come to visit. Glacier is twice as popular as magnificent Flathead Lake, and outranks Big Mountain by a factor of three.<sup>15</sup>

#### Glacier hikers on the trail to Iceberg Lake

PHOTO: KAREN NICHOLS



Overwhelmingly, Flathead business leaders treasure Glacier Park, expressing a deep personal fondness. Across various business sectors, managers and owners believe Glacier is good for local business and the overall economy. Nearly 200 Flathead businesses make that link directly, adopting Glacier as part of their name and identity. And several of the valley's largest developments, either under way or proposed, have adopted Glacier as their icon. These include a proposed mall, a performing arts center, and a redeveloped ski village.

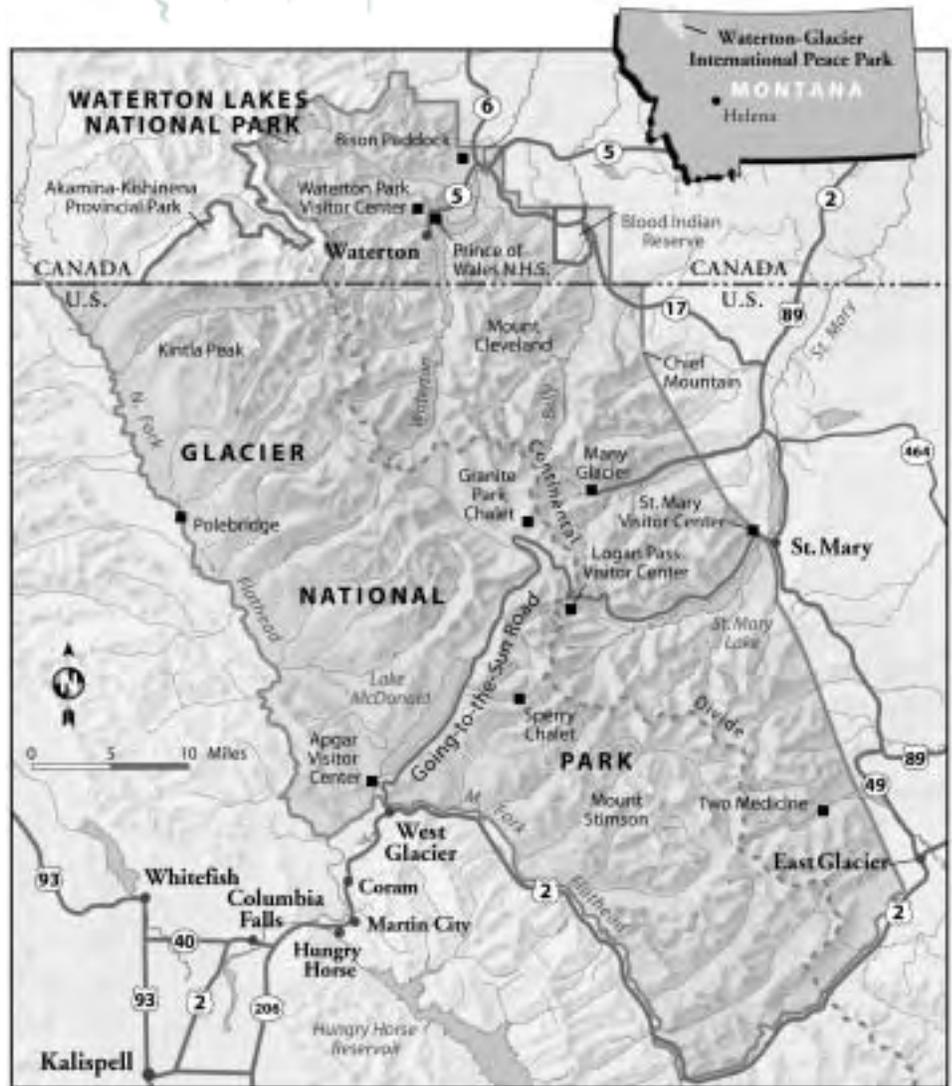
### Glacier's Ecological Importance

The landscapes protected within Glacier National Park are essential to the natural amenities that Flathead residents and visitors enjoy, even many miles outside park boundaries. Substantial reaches of the North Fork and Middle Fork of the Flathead River are fed by clean waters that originate in the park. These rivers provide much of the volume in Flathead Lake.

Glacier Park is at the core of an extensive system of U.S. and Canadian public lands that provides important habitat for native species from elk to bull trout, from bear grass to mountain goats, and from lichens to peregrine falcons. The North Fork Flathead drainage provides unique habitat for carnivores such as lynx, grizzly bear, wolf, mountain lion, and marten. Spanning the U.S.-Canada border, this relatively intact and varied natural system hosts in abundance species that are now rare elsewhere in North America. A large part of this critical habitat is protected within Glacier National Park.<sup>16</sup>



FIGURE 8.  
**Waterton-Glacier  
International  
Peace Park**



**Waterton-Glacier was designated the world's first international peace park in 1932 by Congress and the Canadian Parliament**

MAP: MATT KANIA AND ROGER PARCHEN



**Bear grass blossoms enchant Glacier's visitors**

PHOTO: KAREN NICHOLS

# FINDING 4

## Glacier is home to a full theater of large wild mammals

PHOTO: KAREN NICHOLS



## Proximity to national parks is an economic advantage for gateway communities such as Flathead County

The close relationship between Glacier National Park and Flathead County's economic growth and vitality reflects a larger pattern among national park gateway communities across the western United States. These gateway communities—which provide access to and visitor services for national parks—are experiencing similar changes in population, income, and employment. In the West, national parks often anchor a larger complex of public lands that provide desirable natural amenities. Like Glacier, these parks are key economic assets for the surrounding communities.

### Magnets for Migrants

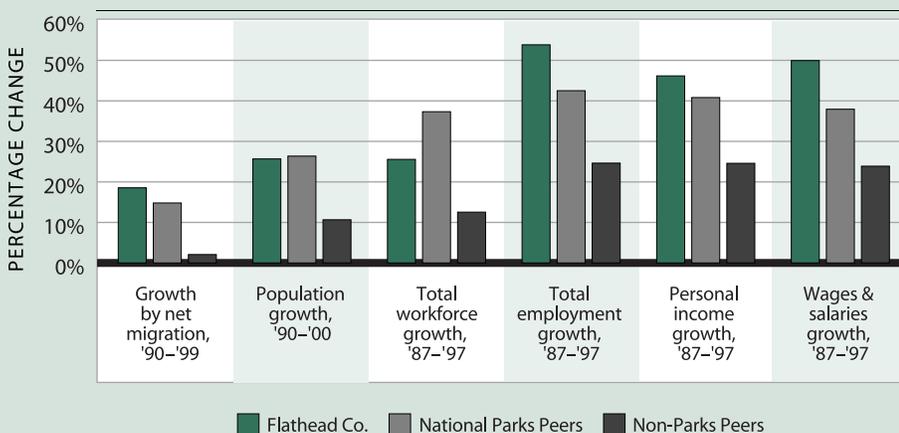
Throughout the western United States, national park gateway communities are among the most attractive to new residents. Fifty-one counties in the West, including Flathead, are next to large, attractive national parks and not part of a large metropolitan area. During the 1990s, 196,000 more people moved into all of these counties put together than moved away—triple the rate of net migration during the '80s.

National parks are magnets for new residents, and not because the parks are generating new jobs for government employees or contractors. In fact, park employment overall has declined. Similarly, population growth and business growth in these communities is not explained by booming numbers of park visitors. National parks play a different role in today's economy.

Attracted in large part by a clean and beautiful natural environment and access to outdoor recreation—as well as small, friendly towns—people are choosing to live in communities near national parks. Gateway counties that, like Flathead, serve as small regional trade centers, are attracting much of that growth. During the 1990s, such counties bordering national parks saw their populations increase by more than 26

The economic advantage of these park gateway communities can be gauged by comparing the performance of counties that differ primarily in their proximity to national parks. Throughout the West, Flathead County has 64 "peer counties" of similar size and character. Nine of these, including Flathead, are national parks gateway communities (or "national park peers"). The remaining 55 peer counties are not park gateways (or "non-park peers").

FIGURE 9. Trends in Peer Counties of Flathead County



Note: National park "peer counties" are nine counties near large national parks in the 22 contiguous states of the West that: 1) had 1990 populations between 30,000 and 100,000, 2) contained small regional trade centers under 50,000 population, and 3) had less than 10 percent American Indian population. Of the ten national park counties listed in Figure 10 on page 22, Cococino County, AZ, was eliminated as a peer because of its high American Indian population. The non-park peer counties are 64 other counties in the West with similar populations and small regional centers that are not near a major national park. (Source: Swanson, 2002)

percent. Population growth in similar types of trade center counties that are not park gateways was less than half as strong, at 10 percent.

New residents from outside the county are responsible for most population growth in park gateway communities. By contrast, in their non-park peer counties, more people left than moved in during the 1980s. The 1990s were not much better, with very small net in-migration during the decade. While these non-park counties experienced population growth in the 1990s, it was largely because the number of births exceeded deaths.

## Fueling Economic Growth

Across the western United States, national parks fuel strong economic growth in nearby communities. Like Flathead County, these areas enjoy a level of vitality not shared by most of their “non-park” peers. The attractiveness of these park areas drives economic growth.

From 1987 to 1997, gateway counties like Flathead enjoyed a 40 percent growth in total personal income (all income received by individual and households). Income in non-park counties grew at less than two-thirds that rate. During the same time, total employment (all full- and part-time jobs) in park gateway counties grew almost twice as fast as in counties not adjacent to national parks.

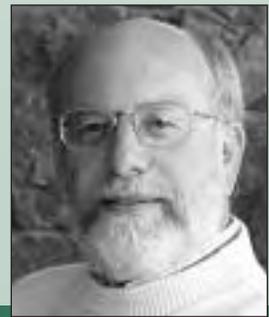
National parks and the other public lands that often surround them are critical anchors for an array of natural amenities. Clean air and water, scenic beauty, recreation opportunities, and wildlife attract visitors and new residents and support economic growth.

## Patterns of Economic Transition

National park gateway counties are going through similar economic changes, including a shift away from reliance on resource extraction. Lumber and wood products manufacturing declined sharply in regional center counties near parks. In these park gateway counties all together, income in the wood products industry fell by 23 percent between 1987 and 1997. Flathead County fared better than many of its peers in this respect—its lumber and wood products earnings declined by only 13 percent during that time.

Flathead County’s gateway peers (see Figure 10) have also grown rapidly in income and employment, particularly in service and trade sectors linked to a growing population. Further, these areas also show evidence of an increasing influence of visitors and part-time residents. As in the Flathead, activity in construction and certain service and trade sectors appears to be expanding more quickly than the local population and income base.

**Located between Arches and Canyonlands national parks, Moab, Utah, has seen 20 percent growth in the last 10 years.** PHOTO: BRAD WEIS



**Morrie Schechtman**, Kalispell

“The Flathead valley is an extraordinary place in two respects: It is one of the most beautiful and inspiring natural environments in the world. And it is an ideal environment for creative people and virtual businesses. Both of these guarantee economic and population growth in the valley—and also in similarly beautiful places—to meet the increasing demand for quality of personal life, as well as the ability to conduct global businesses from a low-stress, people-friendly environment.

But these qualities also guarantee change, and even a certain anger and grief over the speed with which change has been occurring. The ability of all constituencies to identify and grieve their losses will determine how well these changes are integrated into future life in the Flathead.

By acknowledging our losses and embracing change, it should be possible for all parties to engage in an ongoing planning process that maintains many of the values we all share. Planning is absolutely essential to growth. On the surface, people think planning is antithetical to property rights. Actually, planning preserves the sanctity of property.”

**Morrie Schechtman**  
Business Management  
Consultant



**Paul Wachholz**, Kalispell

“People in the Flathead Valley are waking up to the fact that we can determine the fate of our area. We can either sit back and watch what happens or step forward and direct what happens. Maybe people didn’t think they could make much difference before, but now they do. If we don’t get a plan in position, basically, the whole valley will look hodgepodge. It’s to all of our advantage to have clusters where people live and clusters of farming and country landscape.

Same thing with the park. I think it’s very important to keep it in its natural state because that’s the essence and the beauty of it. We need to provide adequate funding for the parks, and we need to restore and maintain the Sun Road and the old buildings.

We can have a beautiful Glacier Park. We can have a beautiful Flathead Lake. We can have beautiful communities. But if we don’t clean up our act where we live, we’re not going to end up with what we want.”

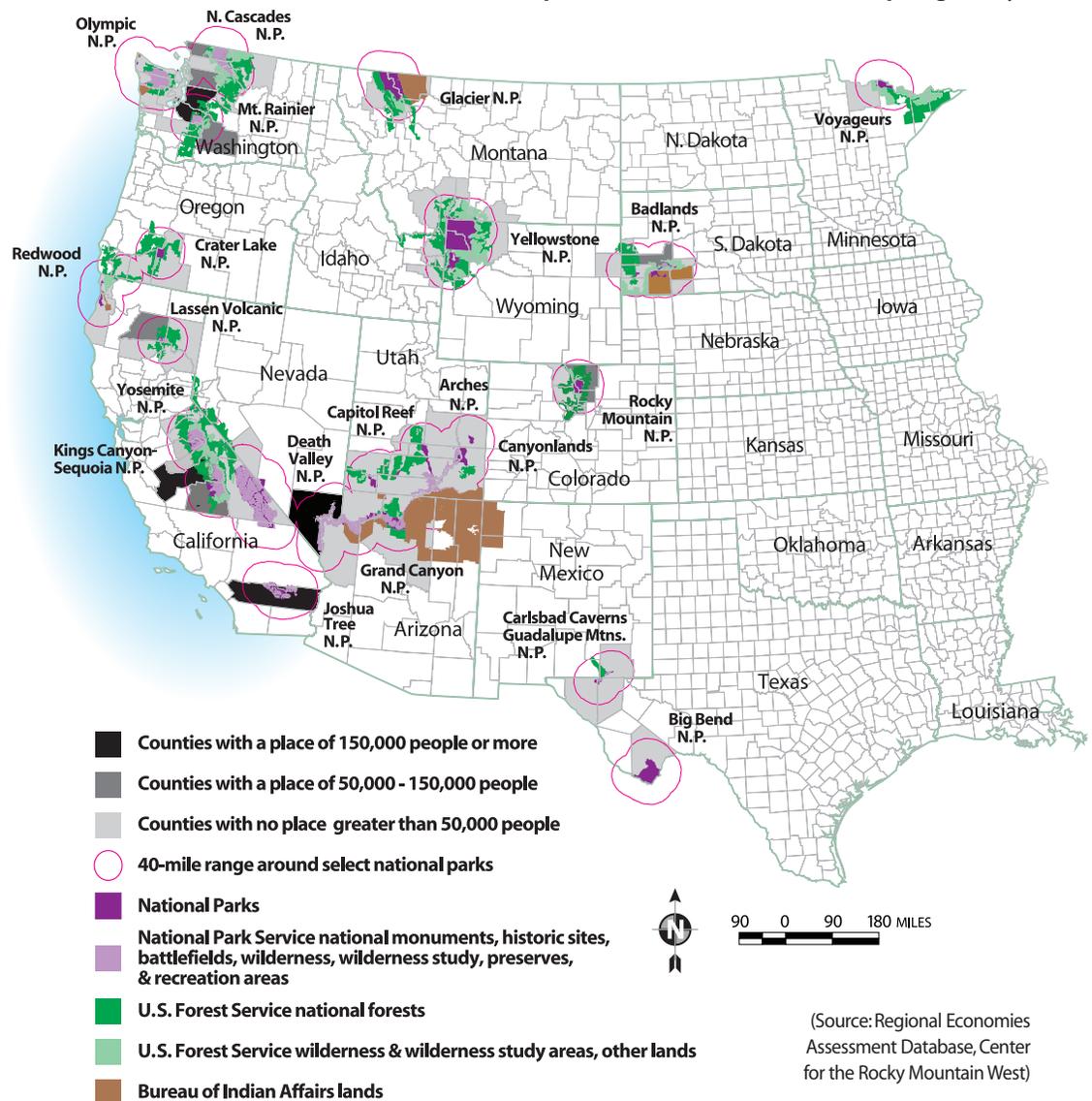
**Paul Wachholz**

Wachholz and Company  
Real Estate

By some measures, Flathead County seems to be doing better than its park gateway peers in linking rapid population and economic growth with qualitative improvements in the well-being of its residents. In 1997, for example, the Flathead poverty rate was 14.2 percent, almost a full percentage point lower than the average for its peer group. And between 1987 and 1997, per capita income in Flathead County grew by 17 percent, more than double the rate of growth in peer counties. Flathead’s per capita income in 2000 exceeded the peer average by more than \$1,200. Like the Flathead, gateway communities across the West are getting an economic lift from an influx of new residents, part-timers, and visitors. But they find this growing popularity threatens the very qualities that make their communities so attractive.

**FIGURE 10. National Park Areas in Western United States**

This map shows areas near major national parks in the 22 contiguous states west of the Mississippi River. Other federal lands adjacent to these parks are also shown. There are 80 western counties whose geographic center is within 40 miles of these parks, the majority of which (51 counties) are non-metropolitan in character. Recent shifts in migration patterns are channeling more and more new residents into many of these non-metropolitan areas that serve as national park gateways.



## The Flathead Valley's most valued qualities and primary economic assets are at risk

Among this region's most important economic assets are those that give the Flathead Valley its unique appeal: The small-town community atmosphere, uncrowded spaces, easy access to outdoor recreation, scenic landscapes, clean water, and wildlife. These are the qualities that area residents are most attached to—and that attract new people to the area.

In the face of rapid population growth and commercial, recreational, and residential development, there are signs that stewardship of these valuable assets has been lacking.

### Perceptions of Change

Overall, valley business leaders agree that the Flathead's unique characteristics have already been degraded, and that these losses continue. They most lament the loss of open space, farmland, and the valley's rural character. Many of them believe that small-town friendliness is being challenged by impatient drivers and demanding customers. Some point to commercial sprawl, the decline in traditional jobs, and the influx of national chain stores as further evidence of the valley's changing character.

Kalispell residents surveyed expressed concerns about open space in their community. Most believe that there is already too little undeveloped open area, and are concerned that what is there will disappear. Survey results suggest that Kalispell residents are more concerned about the loss of open space than are Montanans in general.<sup>17</sup>

A survey of Whitefish residents found that their biggest concerns for the future of their community are maintaining their town's character and protecting environmental qualities. They identified traffic congestion and growth issues, such as strip development, as significant concerns.<sup>18</sup>

Flathead visitors are beginning to echo residents' concerns. In a 2001 survey, returning Montana visitors were asked to indicate how they saw the state changing over time. For each of the 12 characteristics included in the survey, people indicated whether they thought the condition was better, the same, or worse than on previous visits. Survey responses from Glacier Park visitors raise a red flag, suggesting that the very qualities that attract visitors to the area in the first place are being eroded.

Development in the Flathead Valley, 1980

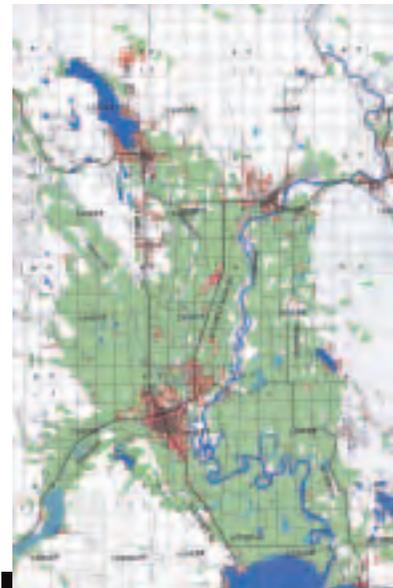
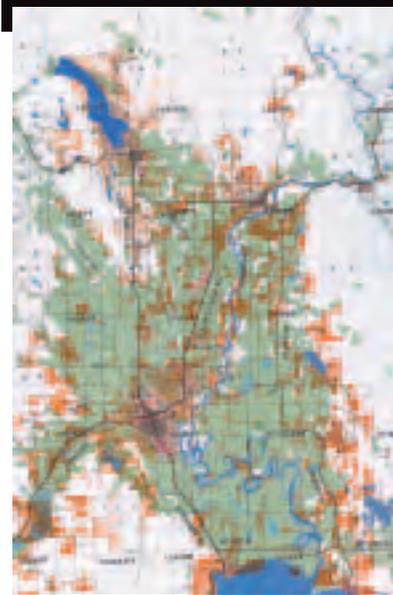


FIGURE 11. **The Face of Growth in the Flathead**

Residential  
Commercial  
Farmland



Development in the Flathead Valley, 1998

**Most of Flathead County's growth is occurring in rural areas, converting wildlife habitat, farms, and forestlands into development. Land-use planning lags behind development pressure in the Valley.**

FIGURE 12. **Open Space Concerns in Kalispell**

	KALISPELL		MONTANA	
	Agree	Disagree	Agree	Disagree
There is adequate undeveloped space in my community	42%	58%	59%	41%
I am concerned with the potential disappearance of open space in my community	76%	24%	60%	40%

(Source: Institute for Tourism and Recreation Research, The University of Montana)

MAPS COURTESY OF CITIZENS FOR A BETTERR FLATHEAD



Among Glacier Park visitors, three features received “worse” ratings from more than 10 percent of respondents: the condition of the natural environment, amount of open space, and wildlife viewing opportunities. One of every five respondents perceived a decline in the amount of open space.<sup>19</sup>

The park visitors surveyed did not go to Yellowstone and were likely to have spent almost three-quarters of their Montana stay in and around Glacier Park. Their perceptions reinforce Flathead residents’ concerns about changes in the local landscape. A clear picture is emerging in which the pace and nature of growth and development are bringing about changes that residents and visitors alike find unappealing.

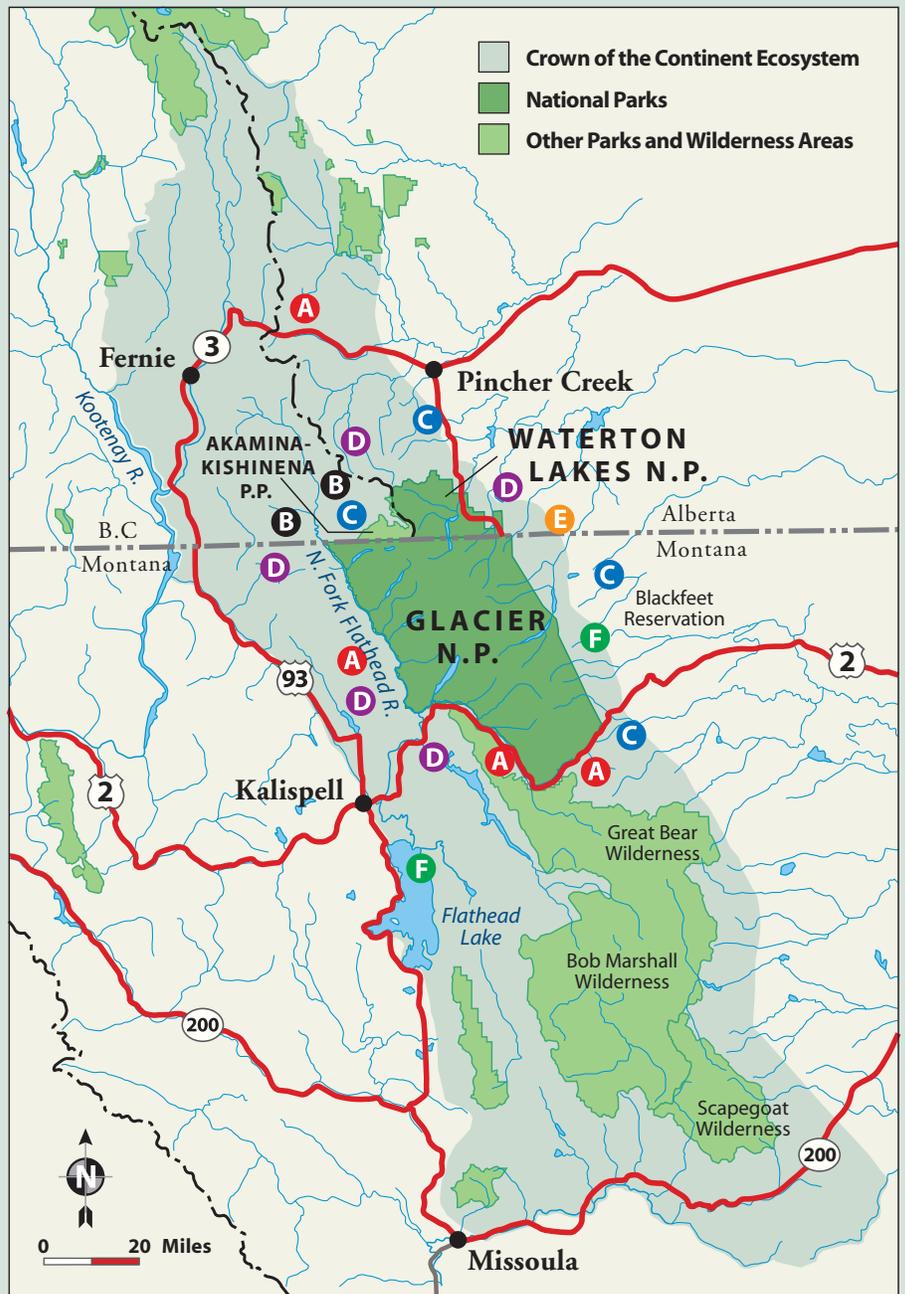
Indian Paintbrush in Glacier PHOTO: NATIONAL PARK SERVICE

FIGURE 13. Threats to Park Resources

- A** Proposed expansion of Highways 2 (U.S.) and 3 (Canada), paving of the North Fork Road, and associated development may impede the travel routes of grizzlies, elk, mountain goats, and other wildlife species. Several grizzlies, attracted to grain spills along the Burlington Northern-Santa Fe railroad, have been killed.
- B** In the currently unsettled Canadian Flathead region, potential hard rock mining, long-term plans to construct an open-pit coal mine, and associated development would adversely affect water quality and transboundary populations of bull trout and other wildlife populations.
- C** High-density road systems and other infrastructure associated with proposed logging, recreational and rural development, and extraction of oil and gas along the Rocky Mountain Front on both sides of the border would displace grizzlies and big game wildlife species that are known to avoid roads and drilling sites. Extensive gas-field development already has degraded habitat and displaced wildlife north of Waterton.
- D** Residential, commercial, and resort developments on ranch, farm, and forest lands have encroached on important seasonal range for elk, mule deer, bears, mountain lions, and other wildlife species. Rapid population growth and poorly planned development may result in even more adverse impacts on wildlife.
- E** In Alberta, the gray wolf can be legally hunted about nine months of every year. Ranchers are allowed to kill wolves within five miles of their land, and there is no limit on the number of gray wolves that can be trapped in a year.
- F** Invasive non-native fish species have migrated from Flathead Lake into the park, and numerous non-native weed species have been introduced into the park through unauthorized grazing by cattle and horses along the borders of the park.

**Examples of landscape alterations abound on land surrounding Waterton-Glacier International Peace Park. Most such changes have negative impacts on the native species that find refuge in the park.**

MAP: MATT KANIA AND ROGER PARCHEN



## Losing Farm and Forest Land

When business leaders talk about losing open space, farmlands, and the rural feel of the valley, it is easy to substantiate their concerns with facts. Periodic Agricultural Censuses report that, between 1978 and 1997, the amount of land in agricultural use decreased by a third, from 327,000 acres to 216,000 acres. Although similar statistics are not available for forested acreage, development patterns in the foothills and at the valley edges suggest a dramatic conversion of historic timberland.

Development is not the only force influencing the amount of farmland in the valley, but it is an important one. During the rapid-growth years from 1992 to 1997, Flathead County lost 1.4 acres of farmland per hour, according to the U.S. Agricultural Census. More than a quarter of all homes in Flathead County were built after 1990. County data show 6,194 new lots and tracts created by subdivision between 1990 and 2000, and 8,225 housing starts in the same period. More than 70 percent of these housing starts went up in rural Flathead County, outside municipal sewer districts.<sup>20</sup>

A long-term decline in agricultural income contributes to the conversion of farmland to yards and parking lots. From a high of \$45 million in 1980, farm income in the county has steadily declined to \$30-\$35 million a year during the last half of the 1990s. Annual production expenses also total between \$30 and \$35 million a year, indicating that Flathead farmers are either losing money or not making very much. As real estate values climb because of development potential, the valley's farmlands and private forest lands are more likely than ever to be sold and developed. The conversion of these lands affects the area's open, rural feel; access for outdoor recreation such as hunting, fishing, and walking in the woods; and habitat for wildlife—especially seasonal range for bears, deer and elk, and mountain lions.

## Threats to Waterton-Glacier International Peace Park

In 2002, the National Parks Conservation Association released its State of the Parks® report for Waterton-Glacier International Peace Park.<sup>21</sup> This assessment finds that haphazard development of nearby landscapes and inadequate funding for basic park operations threaten the natural and cultural resources that make the park so extraordinary. Key points include:

- The Peace Park is one of the few protected places in the lower 48 states and southern Canada where a complete set of large predators, including grizzlies and gray wolves, still plays a prominent role in a largely natural ecosystem. The health of these wildlife populations is tied to their current ability to range freely across governmental boundaries.

**According to the U.S. Agricultural Census, Flathead County lost 1.4 acres of farmland per hour in the mid-1990s**

PHOTO: KAREN NICHOLS



PHOTO: KAREN NICHOLS

“I wouldn’t drive up the Flathead Valley again.... There’s a lot more sprawl than I expected. Really, I mean Missoula basically to Whitefish looks a lot like Oregon. It looks a lot like California. Where little towns stop being little towns and there’s kind of sprawl. I haven’t been here since ‘61, so it’s been a long time. I think my expectation was that it was going to be a little wilder than it was. And that was a ... disappointment.”

**Couple from California, describing their trip through the Flathead Valley**

(The Montana Vacation Experience, Institute for Tourism and Recreation Research, 2002)

**The historic Many Glacier Hotel is in need of extensive repairs**

PHOTO: NPCA



Proposed highway expansion and North Fork road paving could impede the travel routes of grizzlies, elk, mountain goats, and other wildlife. Intensified development on ranch, farm, and forest lands has encroached on important seasonal range. Rapid population growth and poorly planned development may result in even more adverse impacts on wildlife.

- Waterton-Glacier protects six National Historic Landmarks and more than 350 structures listed on the National Register of Historic Places. Many Glacier Hotel and Going-to-the-Sun Road are two of the best known of these attractions.

Park staff estimate that Glacier's backlog of deferred maintenance and construction needs exceeds \$400 million. The total includes funds needed to construct a new west-side visitor center, stabilize historic hotels, and rehabilitate Going-to-the-Sun Road.

- Glacier Park was designated to protect the area's natural and cultural resources.

The park has neither the staff nor the money to monitor wildlife populations adequately, complete needed archaeological research, maintain historic structures and museum collections, and provide high-quality visitor services that people have come to expect at national parks.

Overall, the State of the Parks® assessment suggests that a long history of protection has not spared the park from serious threats. These threats are worthy of Flathead residents' attention and action, as an investment in the valley's continued economic success.

**Bighorn sheep graze in Glacier's alpine meadows**

PHOTO: LARRY STOLTE



**In a tunnel on the Going-to-the-Sun Road**

PHOTO: KAREN NICHOLS



## Flathead communities must encourage high-quality economic growth and development

The Flathead economy might best be thought of as a “transitional” economy. Across the country, resource industries such as wood products and metals processing are playing a smaller economic role. In the Flathead, troubles caused in part by declines in these long-standing pillars of the local economy have been offset in the 1990s by economic expansion closely linked to an influx of new valley residents.

The valley’s growing popularity has been such a strong force that the local economy has become largely driven by, and dependent on, that growth. To ensure long-term prosperity, the Flathead must use its current strength to retool the valley’s economy so it remains strong and resilient, even when population growth subsides.

For now, the Flathead’s popularity remains high. Over the longer term, however, growth may degrade the very assets that make the area an attractive place to live.

Quantitative growth—more people, more jobs, and more income—is a given for now. The valley’s communities must focus their attention on promoting “qualitative” growth—change that improves the well-being of Flathead residents and protects the area’s most vital economic assets. The influx of new full-time and part-time residents has brought more jobs and income, volunteer energy, tax revenues, ideas, and other resources to valley communities. This puts the Flathead in a position to better guide growth and development to support local values.



**Downtown Kalispell maintains its small-town feel**

PHOTO: KAREN NICHOLS

### Quality Economic Development

The economic setbacks of the 1980s have been more than offset by a resurgence in per capita income and median family income, and a drop in the area poverty and unemployment rates. Flathead County is on par with its peers in these indicators of economic well-being. Still, the community could do much to improve its residents’ quality of life, and to ensure that economic growth leads to higher levels of qualitative growth and genuine economic improvement.

FIGURE 14. **Business Leaders’ Views on Land Use Planning**

	More	Less	OK Now	Don’t Know
Do you feel there should be more land use planning or less land use planning?	55%	24%	9%	12%

(Source: A & A Research, Kalispell Chamber of Commerce Survey, October 2001)



**Joel Bonda**, Kalispell

“In my work I deal with entrepreneurial high-tech firms located throughout the country, and I’ve asked them what factors might attract them to expand or relocate in Flathead Valley. First, they say that they would move to Montana for its environment: open spaces, big sky, pure water, fresh air. Glacier National Park is a huge part of the attractiveness of this place.

But these entrepreneurs also say, without exception, that they would only move to a state that showed total commitment to public education. They want this for their children, yes, but they say they cannot operate in today’s new economy without a highly educated workforce. Not just a workforce that is literate, but one that is technologically sophisticated and that has been taught to think analytically.

Our environment and quality of life are our strongest economic assets. As a community, we can best use this asset for economic development only if we also invest in a top-notch education system. That’s how the Flathead can thrive in this new economy.

**Joel Bonda**

Software Developer

The Flathead’s greatest economic development need is to cultivate growth in better paying jobs with benefits that can fully sustain workers and their families. Because job growth is already happening, creating higher quality jobs should be the focus rather than simply creating more jobs.

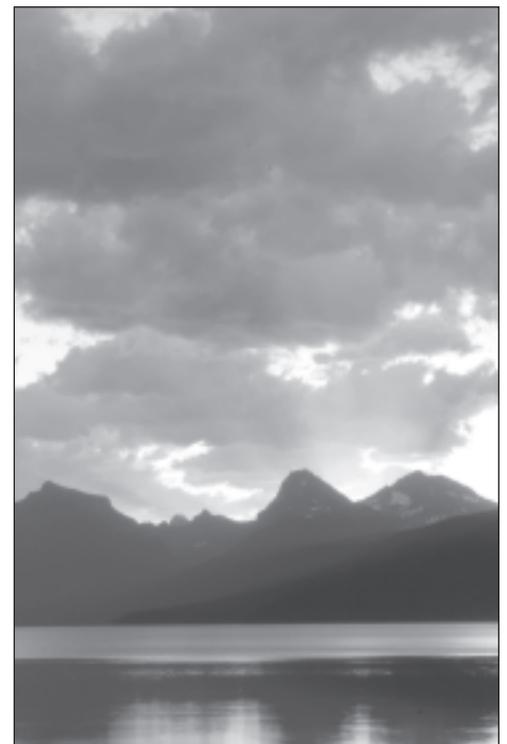
Flathead County should do all it can to foster a pool of high-quality, well-educated workers and entrepreneurs. Doing so requires a sustained public commitment to education and training. This serves to prepare future employees, and it attracts high-caliber workers and business owners with school-aged children to the area. Education and training also help workers adjust to economic transitions.

## Planning for Growth

If population growth meets current forecasts, Flathead County will be home to between 87,000 and 100,000 people by 2010. As development continues, the character and appeal of the valley may be increasingly difficult to maintain. “...[N]o place will retain its special appeal by accident,” writes Ed McMahon, co-author of *Balancing Nature and Commerce in Gateway Communities* (1997). He notes that gateway communities such as Flathead County are “ground zero” in the struggle between haphazard development and planned growth.<sup>22</sup> Haphazard development undermines the qualities that long-time community members, new residents, and visitors all find most attractive—the valley’s most important economic assets.

Local business leaders interviewed for this report share a belief that unplanned growth could one day act as a drag on the region’s economy and that city and county governments have not responded adequately to growth. In a survey of Kalispell residents, a solid majority of 80 percent agreed that they would support land use measures to help manage future growth in their community.<sup>23</sup>

In the Flathead Valley, no clear picture has yet emerged of what action would best help the valley get a handle on growth and encourage the kinds of recreational, residential, and commercial development that enhance the lives of area residents. Indeed, views diverge significantly on this question, and the local political climate may stand in the way of achieving consensus. More than half of the business leaders interviewed for this report believe that the tone of public debate in the Flathead Valley is harsh, dominated by parties with extreme viewpoints. Between the extremes is a vast middle ground and ample room for compromise and action.



**Sunset on McDonald Lake**

PHOTO: KAREN NICHOLS

In the face of these challenges, people in the Flathead share similar concerns about the future. In separate surveys, Kalispell and Whitefish residents identified the most important issues facing their communities. Maintaining existing community character, protecting the natural environment, diversifying the economy, and supporting local business growth topped the lists.<sup>24</sup> Flathead residents recognize the importance of their natural and community amenities to their own quality of life and to the economic health of the valley.

## Collaborative Action

These common views can form a solid foundation for community dialogue and collaborative action. Flathead communities and their leaders need to begin sorting out “good growth” from “bad growth,” and figuring out strategies to guide development.

Partnerships are critical to taking charge in the face of rapid change. In the Flathead, those partnerships must involve public land managers. The Flathead Valley’s economic strength is closely linked to the health of the surrounding public lands. Similarly, the health of Glacier National Park, other public lands, and natural resources such as clean water depend on what happens within a broader context that includes the private lands and developed areas of the Flathead Valley. As the NPCA State of the Parks<sup>®</sup> assessment determined, most threats to Glacier originate outside park boundaries.

Given shortfalls in funding and staffing, Glacier National Park and other land management agencies cannot protect the valley’s resources and assets without cooperation from Flathead community leaders. Broad support from its gateway communities will be essential as Glacier seeks massive congressional appropriations to fix its deteriorating infrastructure, particularly Going-to-the-Sun Road.

Dialogue and collaboration across all kinds of boundaries (including city/county, public/private, and U.S./Canada) must occur for the Flathead to create a unified effort to guide change, enhance residents’ well-being, and protect the area’s most important assets. If no place retains its special appeal by accident, as Ed McMahon suggests, then it is time for Flathead residents to craft clear plans and specific initiatives.



**Working together in Glacier**

PHOTO: KAREN NICHOLS

**Forest glen in Glacier National Park**

PHOTO: NATIONAL PARK SERVICE



“Across America, dozens of communities are demonstrating that economic prosperity doesn’t have to degrade natural surroundings, rob them of their character, or turn them into crowded tourist traps. Many of these initiatives resulted from partnerships involving both gateway communities and public land managers.”

—Ed McMahon, co-author of *Balancing Nature and Commerce in Gateway Communities*



**Andy Feury, Whitefish**

"We as decision makers must look to the future and recognize the changing face of our economies in the West. The quality of our environment and the character of our communities are fast becoming major contributors to that economy. They are our most important economic assets.

We have experienced a great deal of growth due to the beauty of the environment surrounding us and the easy recreational access to public lands. As a result of this growth, developers of all stripes want to move into our valley. We have the enviable opportunity to decide what kind of development we want, where we want it to go, and how we want it to look.

As a community, we can afford to steer development to meet our needs. We don't have to settle for whatever proposals walk in the door. In fact, we must direct development in a way that protects our core assets as an attractive, friendly place to live. To do otherwise would be unwise and unfair to future generations."

**Andy Feury**

Mayor of Whitefish, and independent lumber broker

**Investing in Valley Assets**

Recent trends suggest that the next decade will bring many more people to Flathead County. To sustain the appeal that is at the heart of the Flathead's economic vitality, the fundamental assets of community character and environmental quality need to be protected and enhanced.

Recent trends suggest that Flathead County will see a continued influx of new residents, attracted by the area's outdoor amenities and quality of life. The economy will continue to grow, diversify, and add high-paying jobs. Yet many fear that a growing population may accelerate changes that erode the area's attractiveness.

The character of the Flathead's communities and its environmental qualities are at the heart of its appeal and economic vitality. Investing money, time, energy, and thought into protecting and enhancing these assets is an investment in the future.



**Blackfoot Indians called Glacier's rugged spine the Backbone of the World. George Bird Grinnell, an early proponent of Glacier's park designation, called this region the Crown of the Continent.**

PHOTO: KAREN NICHOLS



**Amenity** — A quality or feature that adds perceived economic value.

**Gateway community** — A town or group of towns that provides access to public lands such as national parks, as well as services for visitors to these natural areas.

**Inflation-adjusted (real) dollars** — Since the value of money changes over time due to inflation, economists account for these changes in their analyses. In this report, real dollar amounts are reported in “1996 dollars,” which means that figures from years other than 1996 are adjusted to remove the effects of inflation, providing a true base of comparison.

**Median income** — This can be calculated for individuals, families, or households. To arrive at median family income for an area, imagine listing all of the families in that area according to the total amount of money they receive each year from all sources. The income figure in exactly the middle of that list is the median family income.

**Net migration** — The difference between the number of persons moving to an area and the number moving away, and considers only persons changing their permanent residence.

**Natural change** — The difference between the number of births and the number of deaths in a locality.

**Per capita income** — This is the average income per person in an area, calculated by adding all income received by all residents of an area, regardless of age, and dividing this total by the number of area residents.

**Poverty rate** — A U.S. Census Bureau calculation of the percentage of a population living at income levels below those deemed necessary for basic sustenance. No consideration is given to variations in the local cost of living in making poverty estimates.

**Qualitative growth** — Economic expansion and change that improves the well-being of area residents and protects valuable assets.

**Quantitative growth** — Expansion in the size of an area’s economy, seen in indicators such as population growth and increasing numbers of jobs and total income.

**Sector, Sub-sector** — A “sector” is one of 14 major categories into which economic activity is divided. Sectors include manufacturing, construction, services, retail trade, local government, farm and ranch producers, and eight other categories. A “sub-sector” is a smaller economic division within a sector. For example, the “services” sector is comprised of activity in a number of areas including health care, business services, legal services, engineering and management services, auto repair, and so forth.

**Total personal income** — All money received from all sources by all individuals and households in an area.

**Unemployment rate** — The number of people who are not employed but who are actively seeking work, expressed as a percentage of the total adult population that is capable of working.

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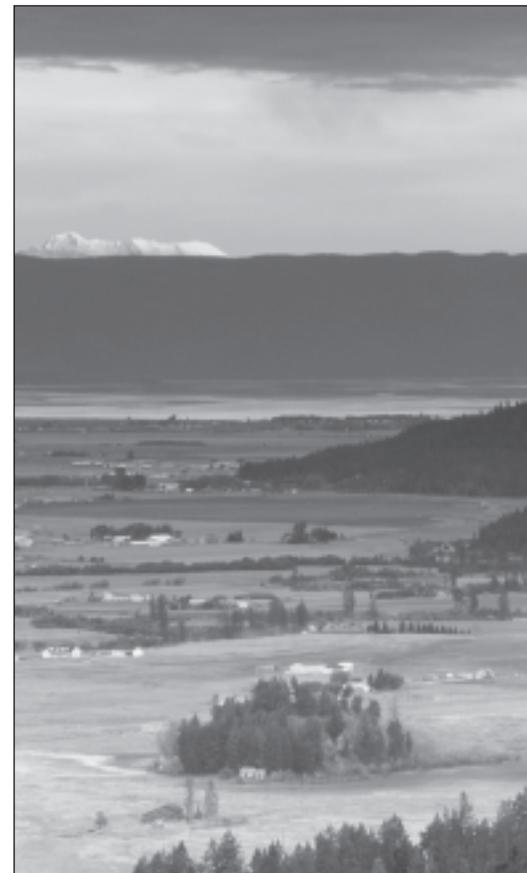
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## Flathead Lake near Somers

PHOTO: KAREN NICHOLS



# Gateway to Glacier

## The Emerging Economy of Flathead County

National parks exert a powerful pull on the American people. They rejuvenate us and they preserve our cultural and natural wonders. Every year, tens of millions of Americans visit our national parks.

But from an economic perspective, national parks do much more than draw visitors. Today, Americans in growing numbers choose to locate their families and businesses in gateway communities next to our national parks.

Growth brings change and change brings challenges. Fortunately, many gateway communities are forming creative partnerships to ensure that growth does not degrade the natural environment and community character that make these places so special.

—Tom Kiernan,  
President, National Parks Conservation Association

### National Parks Conservation Association



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