

Memorandum

To: Going-to-the-Sun Road Citizens Advisory Committee
Fred Babb, Glacier National Park

From: Coley/Forrest, Inc. and
Washington Infrastructure Services, Inc.

Re: Business Survey Results and Implications to the Socioeconomic Study

The results of the business survey were completed after the *Going-to-the-Sun Road Socioeconomic Study* (Study) was submitted to the National Park Service and the Going-to-the-Sun Road Citizens Advisory Committee. This memorandum outlines how the business survey results add to, confirm, or conflict with the Study.

Additions to the Socioeconomic Base Analysis. To administer the business survey, a comprehensive list of businesses in the local impact area was purchased from a private vendor, InfoUSA. This list shows the number of businesses for the three counties in the local impact area (Flathead, Lake, and Glacier), plus southwest Alberta, by four-digit standard industrial classification (SIC). This is an additional level of descriptive detail. Data contained in the Socioeconomic Base Analysis (Chapter 3 of the Study) was derived from public sources and was not as specific.

Results from the business survey also provide information from business managers regarding their perceptions about the amount of business attributable to visitors or tourists. This level of detail was not available before from the secondary data sources used to compile the socioeconomic base analysis.

Comparison: Visitor Development Strategy and Mitigation Recommendations. The Study presents a visitor development strategy and actions. This was developed with the help of local economic development and tourism development specialists through a series of work sessions and follow-up research and analysis by the economics consultant.

Business survey respondents were asked to “suggest programs, activities or projects that should be considered to minimize potential impacts” on the local business community. The survey question was purposely presented in an open-ended format to encourage respondent initiative and creativity rather than in a closed-end, multiple-choice format. This memorandum compares the results of each.

Local economic development specialists developed the visitor development strategy in a collaborative format. Individual business owners and managers prepared their recommendations individually. The similarities between the two sets of recommendations are remarkable. While each set of recommendations contains ideas that the other one does not, there are virtually no inconsistencies.

Both sets of recommendations place a strong emphasis on strategic use of the media, marketing other visitor attractions within and outside of the park, physical and programmatic improvements within the park, improving public transit, and additional ranger services.

The business survey also contains a number of specific construction management recommendations while the Going-to-the-Sun Road rehabilitation is in progress.

The visitor development strategy proposes several organizational ideas, such as improving customer service through hospitality training and improving cooperation among local organizations involved in visitor development.

The table that follows provides an action-by-action comparison between the visitor development strategy and the business survey respondent recommendations. The percent of respondents making a particular remark might at first seem small. However, the query was framed as an open-ended question. Each percentage point equals five people who independently reached the same conclusion.

Priority Visitor Development Actions	Business Survey Respondents' Comments
1. Upgrade public transportation to and through Glacier National Park.	7% of the respondents recommended upgrading public transportation; 3% percent recommended that Going-to-the-Sun Road be accessed via transit only on a permanent basis.
2. Improve roads adjacent to the park	4% recommended improvements to North Fork Road; 2% recommended improving other roads that provide access through the park; 1% recommended a new route through the park.
3. Upgrade and construct outdoor amphitheaters.	This recommendation was not mentioned.
4. Upgrade and winterize historic hotels.	This recommendation was not mentioned.
5. Use the Lewis & Clark Bicentennial events to introduce visitors to activities other than travel on the Road.	One respondent recommended using the Lewis & Clark Bicentennial events as a way to market the park and counteract Road rehabilitation impacts; another respondent recommended no construction until the Lewis & Clark events were complete.
6. Improve Internet hypertext linkages and websites.	More generalized remarks were made such as market other areas outside of the park (9%).
7. Change visitor prospect information to introduce sites other than the Road.	13% said it is important to market other areas within the park. This was the second most frequently mentioned recommendation.
8. Develop information and add NPS staff to improve the experience of visitors stopped by the rehabilitation of the Road.	8% of the survey respondents recommended using construction activity as a visitor attraction; ideas included developing construction viewing sites, conducting construction tours, and offering slide shows and exhibits at visitor centers to explain the history of the Road and the construction activity.
9. Activate a public information program to aid visitors and local businesses during Road rehabilitation.	2% of the respondents said that accurate and specific information is essential because it will enable local businesses to plan ahead.
10. Manage the media more effectively.	This was the single most frequent remark among business respondents; 17% delivered a message to "use the media." Remarks included: "send positive messages", "never say closed", and "always say the park is accessible."

Priority Visitor Development Actions	Business Survey Respondents' Comments
11. Improve awareness of events and expand opportunities to learn more about the local Native American Heritage.	A few respondents (<1%) made a similar suggestion
12. Broaden services provided at NPS visitor centers at the East and West entrances.	2% recommended that the NPS add ranger programs, hikes, etc. to broaden visitor opportunities while visiting; several recommended offering videos and talks about Road rehabilitation at the visitor centers.
13. Open more of Glacier to visitors and market new venues.	2% of the respondents recommended improving trails, campground sites adding other attractions that do not use Going-to-the-Sun Road for access.
14. Continue improving customer service through hospitality training.	This was not mentioned by survey respondents.
15. Broaden and improve cooperation and communication among local organizations involved in visitor development.	This was not mentioned by survey respondents.
Construction management recommendations are not part of the visitor development strategy.	32% of the respondents recommended some type of Road construction management practice, such as keep one lane open, keep one-half of the road open, construct in the spring and fall months, construct at night, etc.
Financial aid to individual businesses is not a priority action recommendation.	3% of the respondents recommended providing financial aid to businesses negatively impacted by the Road rehabilitation project. Comments included providing aid only to those significantly harmed and developing an accountability program.
Changing park fees is not a priority action recommendation.	2% of the respondents suggested reducing or removing park entrance fees during Road rehabilitation.