

# Turning On the Off-Season

Opportunities for Progress in the Yellowstone-Teton Region

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Yellowstone Business Partnership

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### **Cover photos**

From left: Fall color on Mount Everts (National Park Service/J. Schmidt); Snow along stream (National Park Service/C. Judson); Young moose in Grand Teton National Park (National Park Service)

### **Research Team**

Michele L. Archie and Howard D Terry, The Harbinger Institute; Larry D. Swanson, Ph.D., The O'Connor Center for the Rocky Mountain West, The University of Montana

### **Writing and publication design**

Michele L. Archie

### **Editing**

Howard D Terry

### **Graphics production**

Michele L. Archie

Patty Gude, Headwaters Economics

Doug Lawrence, The O'Connor Center for the Rocky Mountain West

Henry Shovic, Gallatin National Forest

The Yellowstone Business Partnership (YBP) is a nonprofit organization representing over 250 businesses in the Yellowstone-Teton region, an area encompassing 25 counties in Idaho, Montana and Wyoming and including Yellowstone and Grand Teton national parks. Its mission is to unite businesses dedicated to preserving a healthy environment and shaping a prosperous and sustainable future for the region's communities. The Partnership promotes scientific understanding, regional dialogue and collaborative approaches in resolving the region's most complex socioeconomic and natural resource challenges.



Post Office Box 7337 • Bozeman, Montana 59771 • 406.522.7809 • [www.yellowstonebusiness.org](http://www.yellowstonebusiness.org)

# Turning On the Off-Season

## Opportunities for Progress in the Yellowstone-Teton Region

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# Introduction

The Yellowstone-Teton region is a 25-county area surrounding and including Yellowstone National Park and Grand Teton National Park. The core of this region is the Greater Yellowstone ecosystem, an 18-million acre expanse that ranks among the world's largest remaining temperate ecosystems—a national and global treasure.

The region's counties and communities are commonly influenced by the presence of high-quality natural areas, an extensive network of public lands, large wildlife populations, and plentiful opportunities for outdoor recreation. Like many parts of the mountain West, the region is growing rapidly. In large part, this is because more and more people are able to live and conduct business in areas that couple natural amenities with attractive and welcoming communities.

Along with these benefits, Yellowstone-Teton's communities also hold some concerns in common. Among those concerns, the Yellowstone Business Partnership identified seasonal fluctuations in the region's economy as a shared challenge for businesses, communities, and residents.

## Turning On the Off-Season—The Project

In 2006, the Yellowstone Business Partnership commissioned the first phase of a research project to characterize and analyze off-season assets and economic opportunities. This project garnered support from public and private entities around the region.

This “Turning On the Off-Season” project aims to help business and community leaders grasp the nature and implications of regional growth trends—particularly in the off-season months. It will also build understanding of the region across the jurisdictional boundaries and vast geography that tend to isolate its communities.

The region's success and attractiveness rests on a base of assets, which must be maintained and invested in as the region moves forward. Informed and thoughtful leadership will be essential to the region's future prosperity.

The Partnership will use this report to ground, promote, and inform discussions—and ultimately, action—around the Yellowstone-Teton region.

## Turning On the Off-Season—The Report

This report offers a series of snapshots from the larger analysis conducted during the first phase of the “Turning On the Off-Season” project. It focuses on some of the characteristics and indicators that are relevant to understanding how this region operates and its assets and opportunities.

These snapshots are organized into nine categories:

- 1) The region and its subregions;
- 2) The nature of the region's economy and economic changes;
- 3) Economic well-being;
- 4) Seasonality;
- 5) Natural assets and opportunities;
- 6) Recreational assets and opportunities;
- 7) Educational and cultural assets and opportunities;
- 8) Health care assets and opportunities; and
- 9) Transportation assets and opportunities.

This report is backed by technical appendices that provide additional detail and analysis. These are described on page 32, and may be downloaded from the Yellowstone Business Partnership website at [http://www.yellowstonebusiness.org/our\\_programs/socioeconomic\\_research/](http://www.yellowstonebusiness.org/our_programs/socioeconomic_research/).

The Yellowstone-Teton region is connected by a core of public lands with Yellowstone and Grand Teton national parks at their center. These world-renowned natural areas are assets that surrounding communities hold in common, yet they also create a geography that makes it difficult for these communities to function as a social or economic region.

Many parts of this region have been experiencing rapid population growth and aging. Residential development and economic expansion are accompanied by shifts in income sources and industry composition. In order to understand these changes through a finer lens than a broad, region-wide look offers, parts of the analysis conducted during this project focus on six subregions.

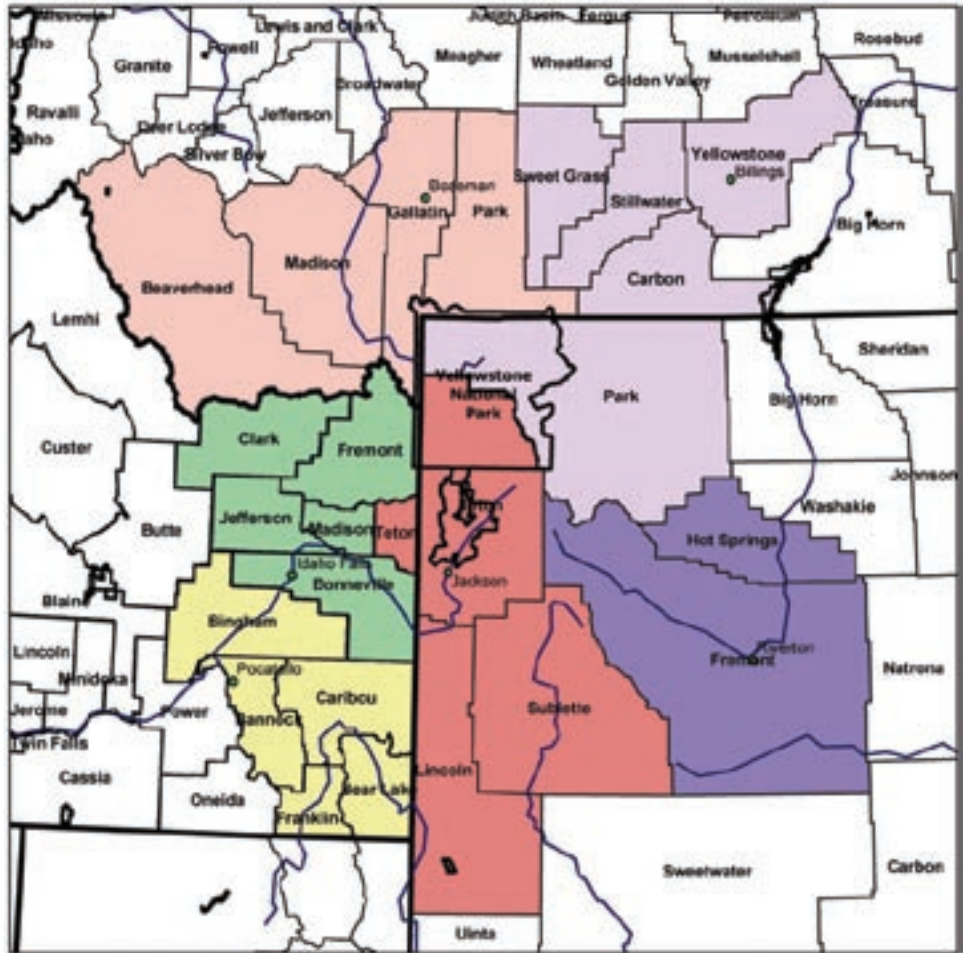
## Regional trade centers focus economic activity

For the most part, these subregions are centered around the larger population centers that lie at the periphery of the Yellowstone-Teton region:

Pocatello and Idaho Falls, Idaho; and Bozeman and Billings, Montana. (See map, upper right.) Each of these cities, while small by national and global standards, is a regional center that anchors economic activity within the larger region. Despite its small size, Jackson, Wyoming, functions in some ways as one of these regional centers. Thus, one of the subregions has Jackson as its core community. Although not large enough to be a true regional center, Riverton functions as a trade center for the two Wyoming counties in the southeast corner of the Yellowstone-Teton region. (See Technical Appendix A for more detail about the urban-rural characteristics of the region.)

Cities and larger towns are the centers of service activity. As economies become more rooted in service industries, the importance of these regional centers is magnified. Health services, advanced education and workforce development, media and information services, and government services are concentrated in these trade centers. The result is a hub of economic activity surrounded by a larger trade and service area.

## Six Subregions



In the pages that follow, six subregions are used to organize the presentation of data and analysis. In graphs that present subregional data, a color consistently represents each geographic area. These colors help identify the data relevant to each subregion.

- Pocatello Region (Bannock, Bear Lake, Bingham, Caribou, and Franklin counties, Idaho)
- Idaho Falls Region (Bonneville, Clark, Fremont, Jefferson, and Madison counties, Idaho)
- Bozeman Region (Gallatin, Beaverhead, Madison, and Park counties, Montana)
- Billings Region (Yellowstone, Carbon, Stillwater, and Sweetgrass counties, Montana, and Park County, Wyoming)
- Riverton/Lander Region (Fremont and Hot Springs counties, Wyoming)
- Jackson Region (Teton, Lincoln, and Sublette counties, Wyoming, and Teton County, Idaho)

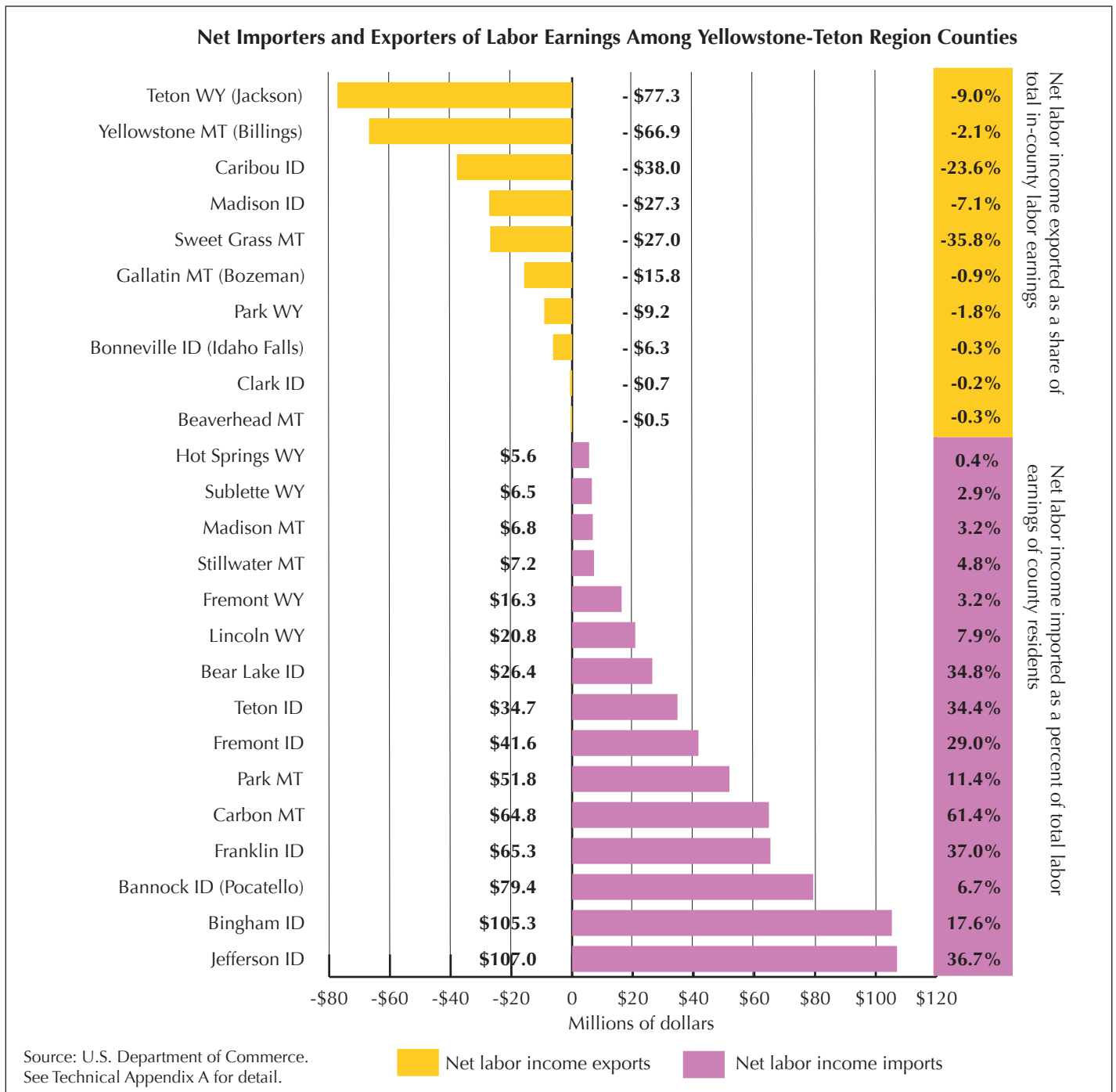
## Yellowstone-Teton's urban areas serve as employment centers for surrounding subregions

The more populated regional center counties tend to be regional employment centers, drawing workers from surrounding counties. In effect, these counties typically “export” labor income to surrounding counties. Other factors, such as the presence of large employers, can make outlying counties function as employment centers that export labor income.

Labor income is reported by place of work and by place of residence. These figures can be used to determine whether a county exports more labor income than it imports, or vice versa.

Typical employment relationships between regional centers and surrounding counties are reflected in parts of the region: Jackson and Billings serve as powerful net labor earnings exporters for their surrounding areas. Bozeman and Idaho Falls are becoming net exporters, as well.

Some counties, such as Carbon (MT), and Bear Lake, Franklin, and Teton (ID), are net importers, deriving large shares of labor income from out-of-county. This is likely due to proximity to regional trade and employment centers or large employers (e.g., mines or resorts) in nearby counties.



# The Nature of the Region's Economy and Economic Changes

## Population growth pushes expansion in construction and real estate

Much of the Yellowstone-Teton region saw rapidly increasing populations during the 1990s. This trend has continued since 2000. Most of this growth spurt is explained by a rise in net in-migration. Many more people have relocated to the region than have moved away.

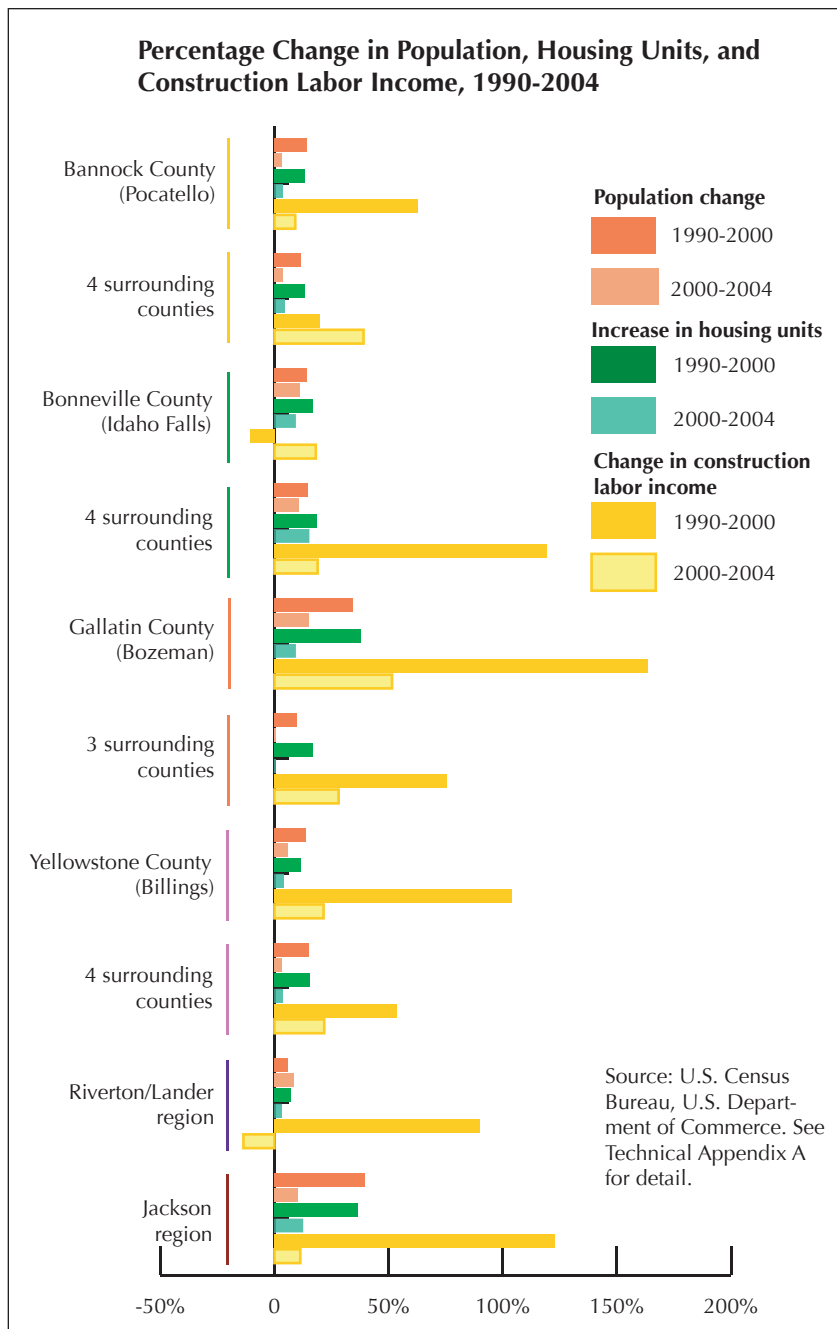
The expanding population has translated into increased housing development throughout most of the region. During the 1990s, nearly every county saw dramatic growth in labor income from construction. Since 2000, this growth has

continued through much of the region, although at a varied pace.

In 1990, construction labor earnings regionwide totaled \$455 million. Adjusted for inflation, they more than doubled in 15 years, climbing to over \$1.14 billion in 2004.

## Implications and Questions

Construction and real estate can be powerful economic stimulants in rapidly growing areas. But over-dependence can be risky, since construction activity is susceptible to large swings and periodic downturns. These downturns may result from rising interest rates or materials costs, shifts in real estate markets, and other factors. How can communities and the region leverage this current economic vitality to create more sustainable sources of jobs and income?



## Counties Highly Dependent on Construction and/or Real Estate Income

	Dependence on Construction Income	Dependence on Real Estate Income
Gallatin	Very High	High
Beaverhead		High
Madison	High	
Park MT		High
Yellowstone	Mod. High	High
Park WY	High	Mod. High
Fremont WY	Mod. High	
Teton WY	High	Very High
Lincoln WY	Very High	
Sublette WY	Very High	
Teton ID	Very High	

Counties with construction labor earnings >\$10 million. Earnings per \$20 million total personal income: Very high > \$1.6 million; High = \$1.3-\$1.6 million; Moderately high = \$1-1.3 million.

Counties with real estate labor earnings >\$5 million. Earnings per \$20 million total personal income: Very high > \$0.6 million; High = \$0.4-\$0.6 million; Moderately high = \$0.2-\$0.4 million.

Source: U.S. Department of Commerce

## Sector employment growth looks different in regional center counties than in more rural counties

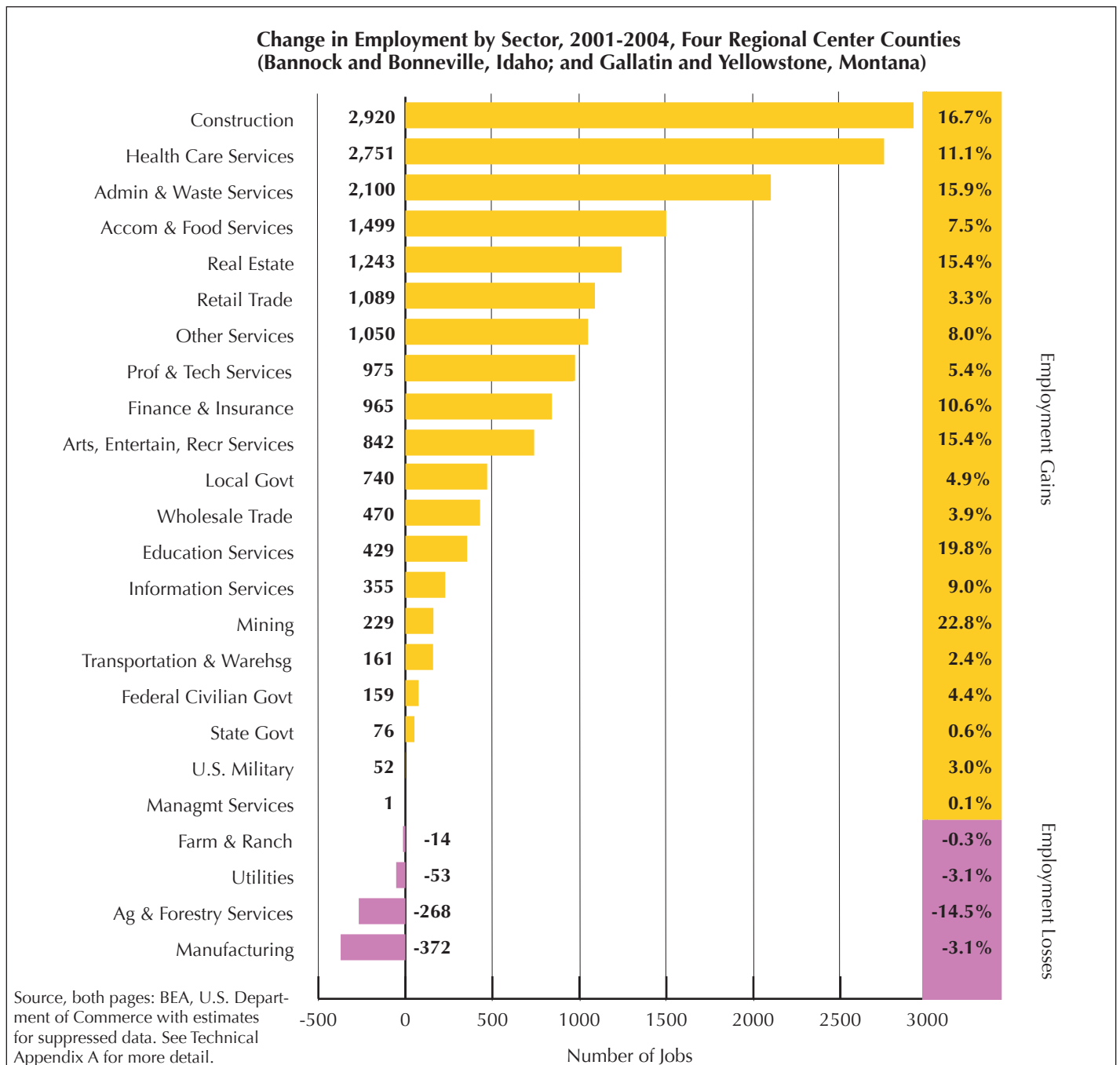
Health care services is one of the largest employment sectors in the region, and one of the fastest-growing. Job growth between 2001 and 2004 was led by construction and three services sectors in the four regional center counties. In the remaining 21 counties—the region’s more rural areas—health care services led job growth, followed by two services sectors and local government.

These data do not reveal the “quality” of the jobs in each sector—their pay level, benefits, or required skill or education level. Nor do the data show the breakdown between full-time, part-time and seasonal employment.

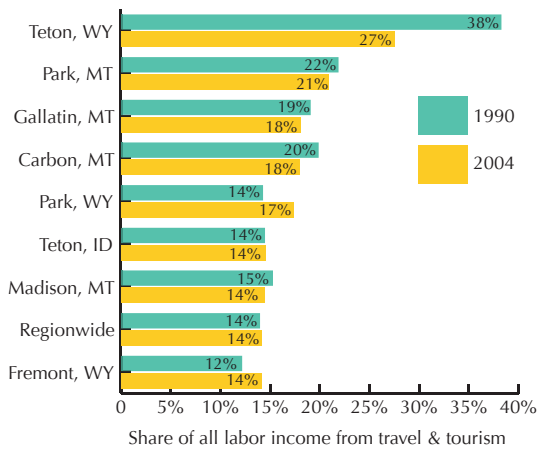
### Implications and Questions

In many sectors, job growth is proceeding rapidly. What do we need to know about the jobs that are being created to gauge their quality?

What types of workforce training and development are needed to support growing sectors? What types of support might encourage growth in desired sectors?



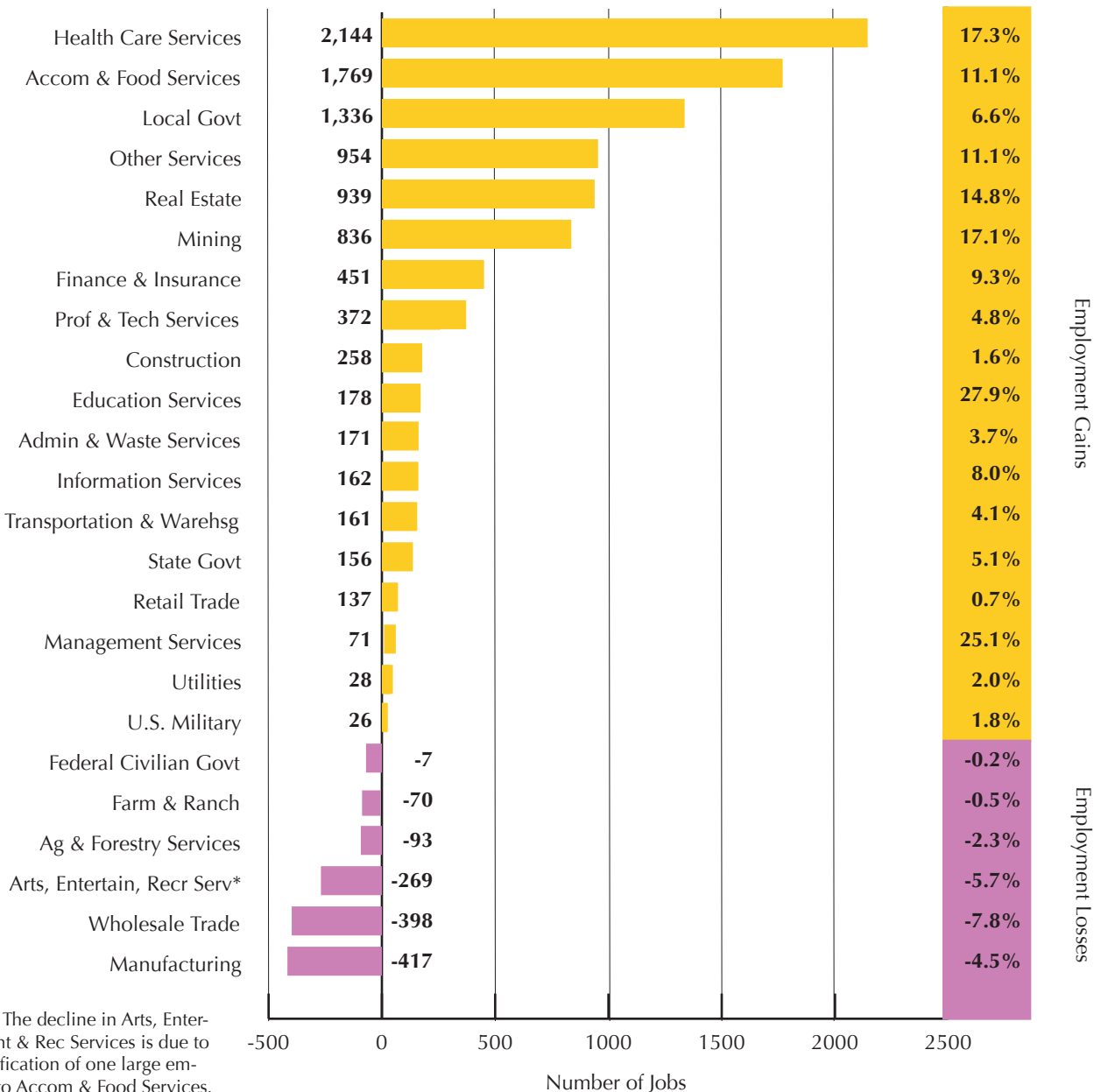
### Most Tourism-Dependent Counties



### Largest Employment Sectors, Yellowstone-Teton Region

Sector	Number of Jobs	Percent of All Jobs
Retail Trade	53,729	12.1%
Health Care Services	41,976	9.5%
Accomod/Food Services	39,344	8.9%
Local Government	37,299	8.4%
Construction	36,726	8.3%
Prof/Tech Services	27,185	6.1%
Other Services	23,762	5.4%
Manufacturing	20,398	4.6%
Admin/Waste Services	20,177	4.5%

### Change in Employment by Sector, 2001-2004 Twenty-One Counties Other than Regional Centers



\* Note: The decline in Arts, Entertainment & Rec Services is due to reclassification of one large employer to Accom & Food Services.

## Labor income key to personal income expansion, while other sources grow in importance

Across the region, growth in labor earnings accounts for most of the dramatic expansion in personal income. Between 1980 and 2004, personal income (adjusted for inflation) nearly doubled. During the same time, the region's population increased by just over a quarter. Most of the growth in both income and population occurred after 1990.

While labor earnings account for the bulk of personal income, other sources have grown more rapidly. Income from investments and transfer payments (mostly Social Security retirement checks) accounts for an expanding share of the personal income pie.

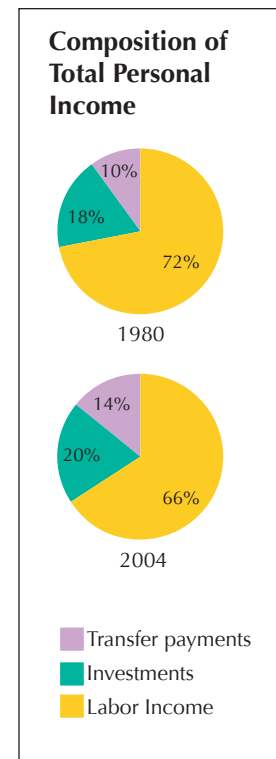
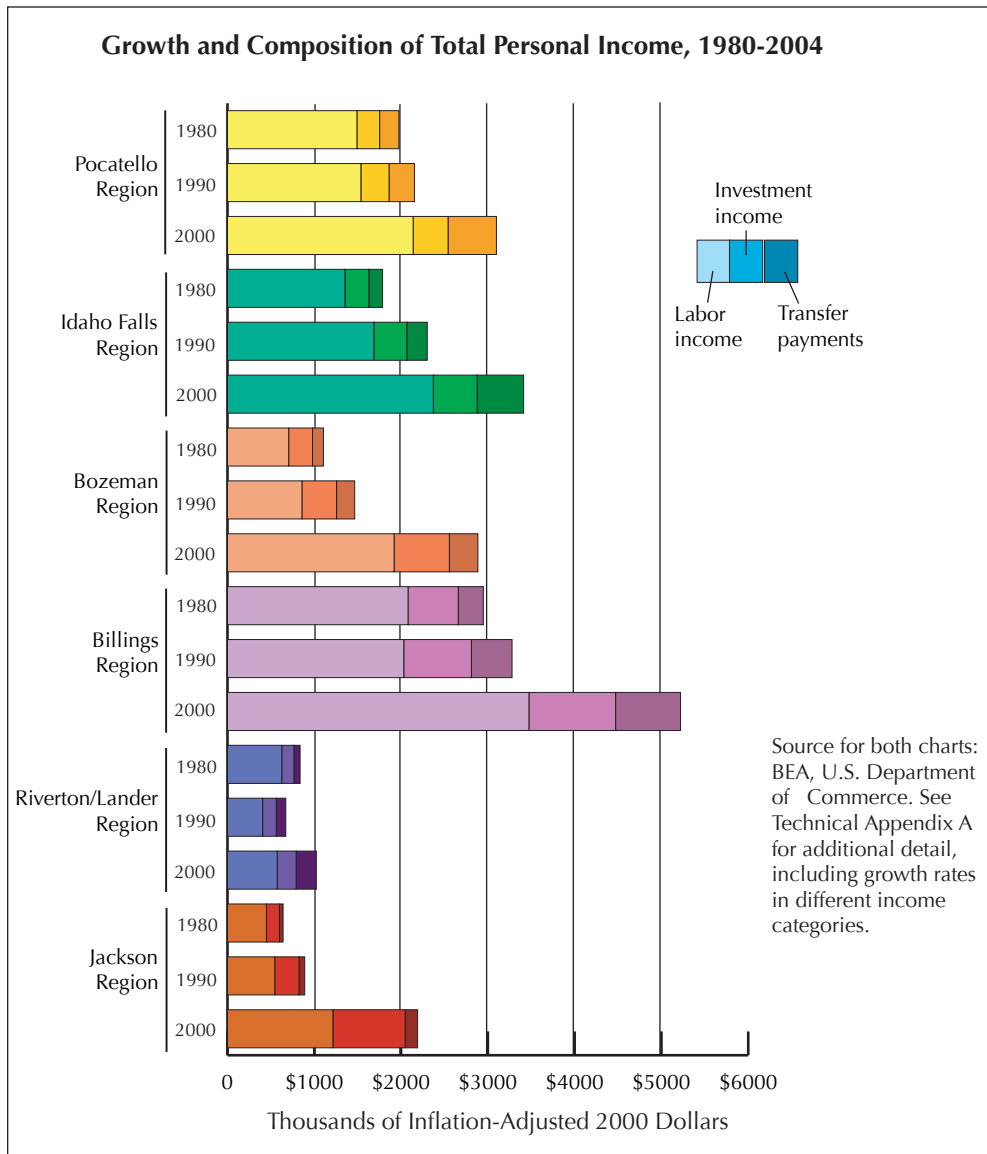
The population of the Yellowstone-Teton region continues to age (see p. 9). As more of the large baby boom generation reaches retirement, transfer payment income will continue to grow as a share of all income. Older individuals will also be

more prone to tap into savings and investment earnings after they retire.

In some parts of the region (see the Jackson region and the Riverton/Lander region in the chart below), these non-labor sources account for nearly half of total income. It is likely that, in the not-too-distant future, employment earnings will comprise less than half of personal income across the whole region.

### Implications and Questions

As employment earnings decline as a percentage of total personal income, what are the implications for economic development? Increasingly, area income will be tied to persons as much as, or more than, to jobs. What investments should communities be making now to attract and hold these growing sources of income?



## Population growth led by older adults, but some subregions remain younger than others

In keeping with nationwide trends, the population of the Yellowstone-Teton region is steadily aging. Population growth is concentrated in the “baby boom” generation and their children (the “boomer echo”).

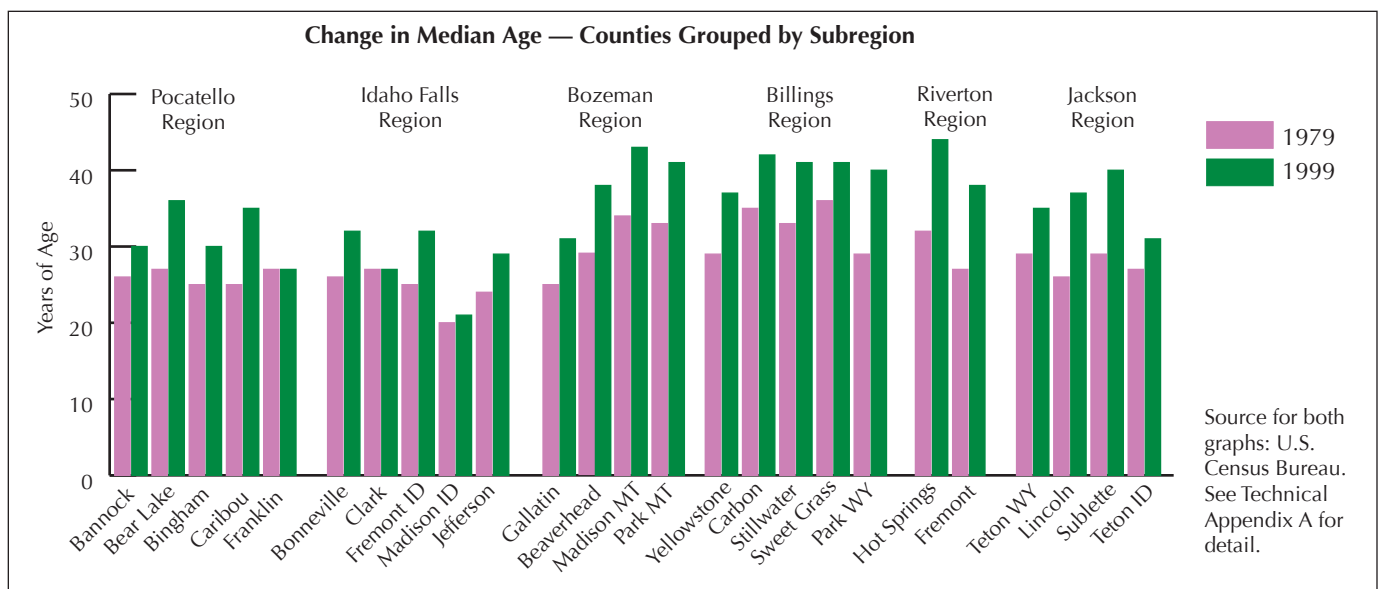
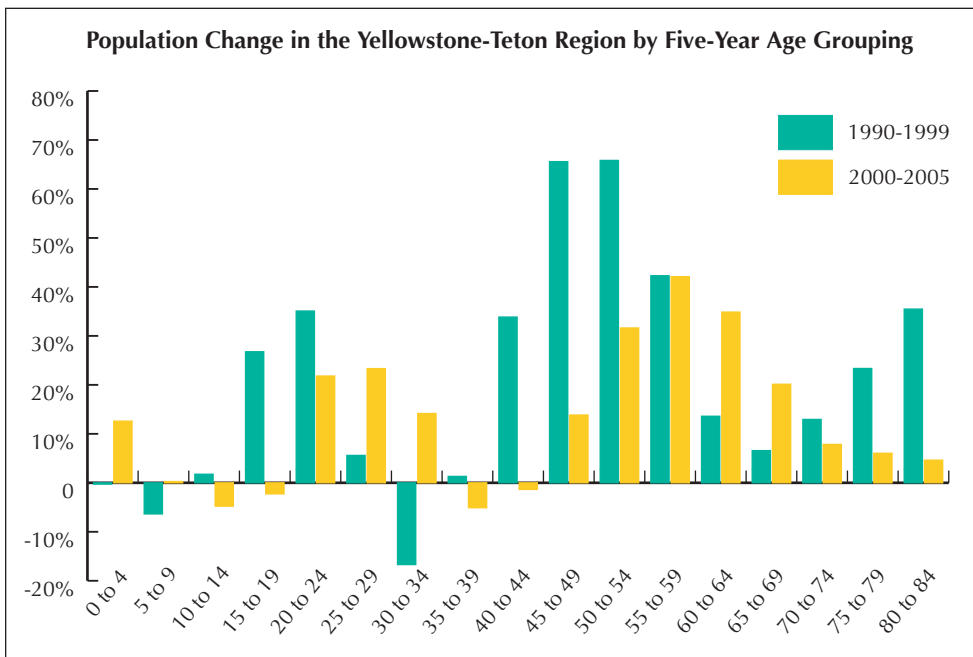
During the 1990s (represented in green on the population change chart below), growth was concentrated among 40-60 year-olds. As time progresses, growth continues to be pushed by the baby boom, with expansion since 2000 (represented in yellow) concentrated among those between 50 and 64 years of age.

Despite this overall picture, aging is not a consistent trend among the region’s counties. Idaho counties tend to be younger, while counties in Montana and Wyoming (espe-

cially rural counties) tend to be older, with rapidly increasing median ages. The lower chart illustrates these differences.

### Implications and Questions

An aging population is likely to leave large holes in the local workforce, with fewer young people coming behind to fill these positions. Where are the gaps likely to be, and what will it take to fill them? How can the region’s communities attract and hold both an older, retired population and young adults and families? What will it take to retain youth, or to attract them back to our communities after they have gained education or work experience elsewhere?



Source for both graphs: U.S. Census Bureau. See Technical Appendix A for detail.

## Private, non-farm employment accounts for most growth; self-employment expands

During the late 1980s, employment growth in the region accelerated, and has been sustained ever since. Between 1980 and 2004, the number of jobs in the region rose by nearly two-thirds.

The private, non-farm sector has led employment expansion, both in numbers of jobs and in growth rate (81 percent). By contrast, government employment grew by 45 percent, while farm and ranch jobs fell 12 percent.

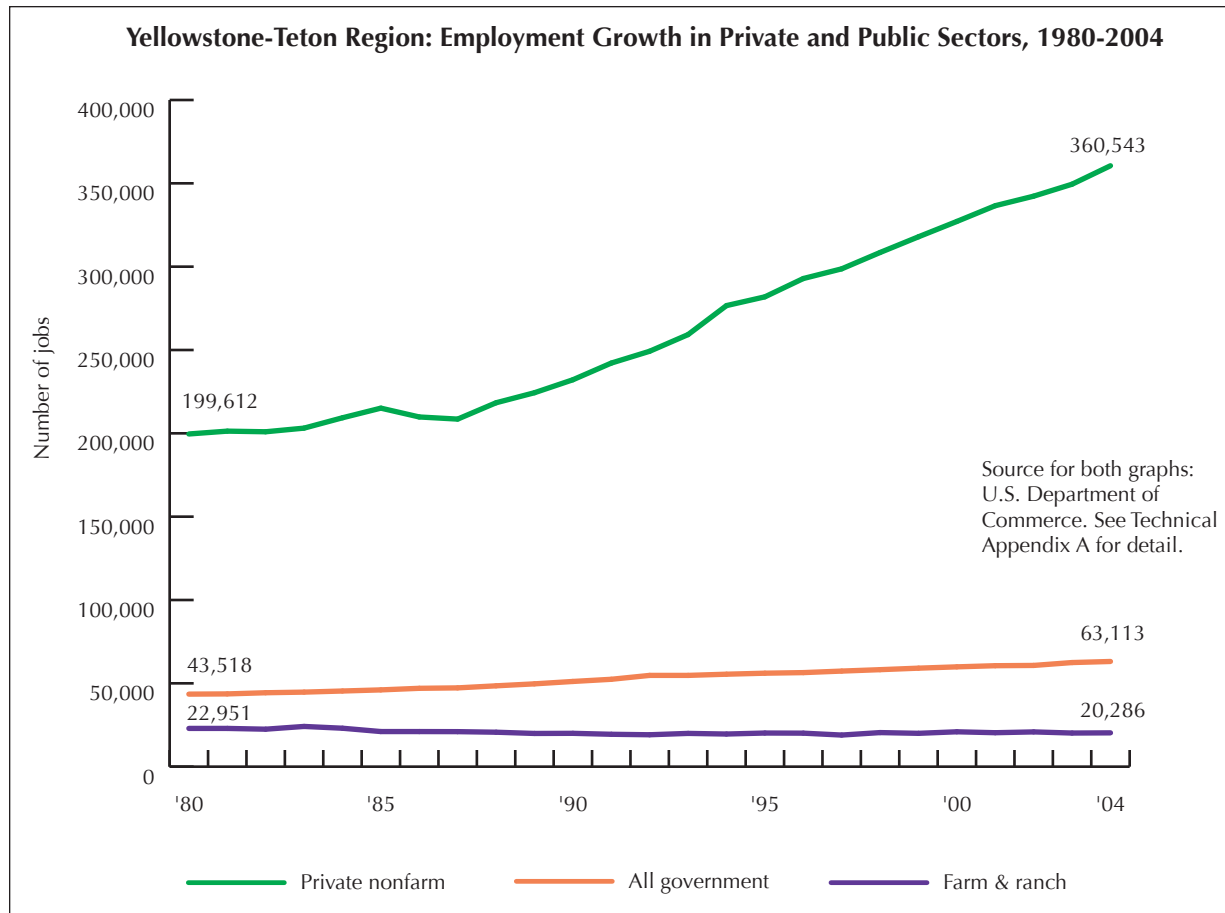
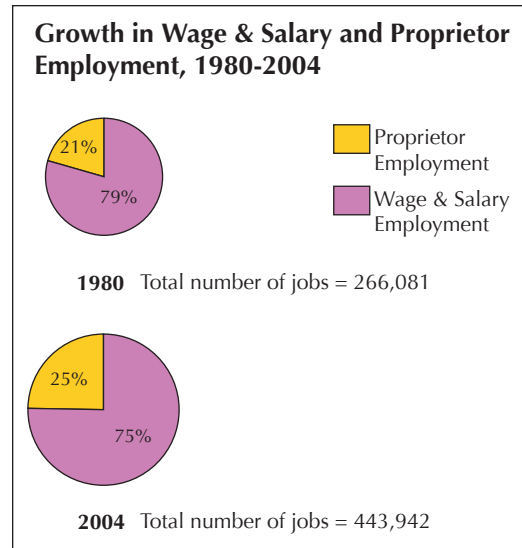
Over that period, proprietor employment grew more rapidly than wage and salary jobs. In 2004, one of four jobs belonged to a self-employed individual.

### Implications and Questions

These data do not differentiate between full-time, part-time, and seasonal jobs. It is particularly difficult to dissect existing data to understand trends, challenges, and opportunities related to self-employment.

Strong growth in self-employment may have implications for how management and technical assistance, training, financial support, and other types of business assistance are provided. Small businesses typically account for the bulk of job

growth. What kind of information would help target support for these small operations? What additional resources and assistance could be offered? How can communities and subregional partnerships leverage local resources to provide targeted assistance to entrepreneurs?



## Per-capita income growing and poverty rates declining across much of the region

The Yellowstone-Teton region has enjoyed steady growth in per-capita income (the average amount of personal income per person). Adjusted for inflation, per-capita income grew nearly 50 percent from 1980 to 2004.

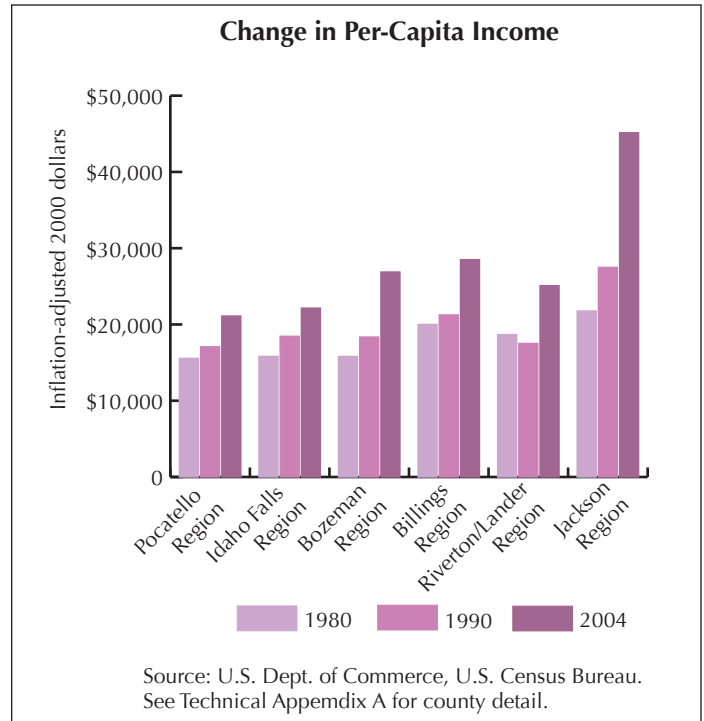
In some parts of the region, percentages of adults and children in poverty have been declining, as well, which suggests real improvements in economic well-being. The Riverton/Lander region is an example.

The Jackson, Wyoming, area is a notable exception. With the strongest increase in per-capita income, this subregion is among the few parts of the larger region with a recent increase in poverty among children. Its poverty rates are, however, lower than in the rest of the region.

Per-capita income data do not illustrate the distribution of income. Thus, even dramatic per-capita income growth may not reflect improvements in well-being across all income levels.

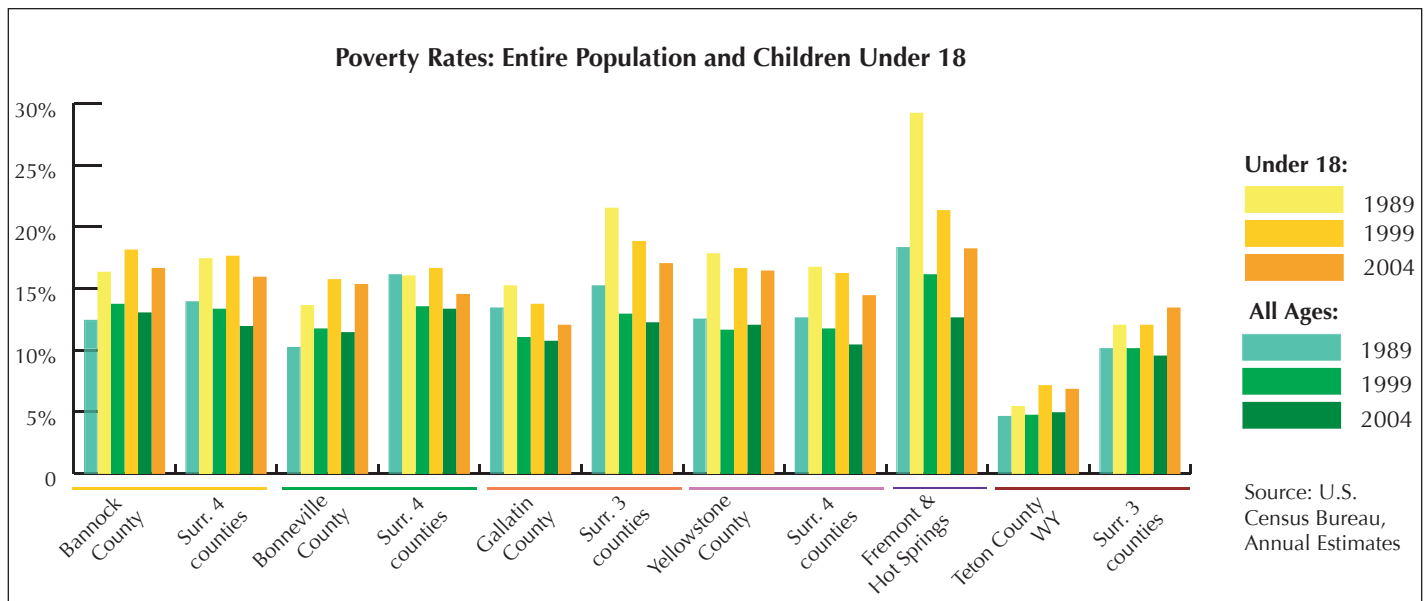
### Implications and Questions

As a whole, the Yellowstone-Teton economy has momentum. What can the region's communities do to ensure that persons at all income levels enjoy the benefits of expanding wealth? How are working families and individuals faring? Are local jobs providing adequate wages?



### Yellowstone-Teton Region Poverty Rate

<b>1989</b>	<b>13.0%</b>
<b>1999</b>	<b>12.2%</b>
<b>2004</b>	<b>11.5%</b>



## Rental housing becoming somewhat more affordable while homeowner costs rise

As a share of household income, rents declined in most subregions between 1989 and 1999. In all subregions, this key indicator of housing affordability remains lower than the U.S. average. In the areas surrounding Bozeman, Montana, and Pocatello, Idaho, rental costs as a percentage of income rose during the 1990s.

By contrast, homeowners' costs rose relative to income in all subregions during the 1990s. In most areas, this measure of affordability was roughly on par with the national average. The Bozeman and Jackson subregions, however, surpass both the U.S. and three-state averages.

The affordability of housing is an important measure of quality of life for the region's communities, and an indicator of the ability of low and moderate income households to support themselves. In general, housing is considered affordable when total housing costs, including utilities, are 30 percent or less of household income.

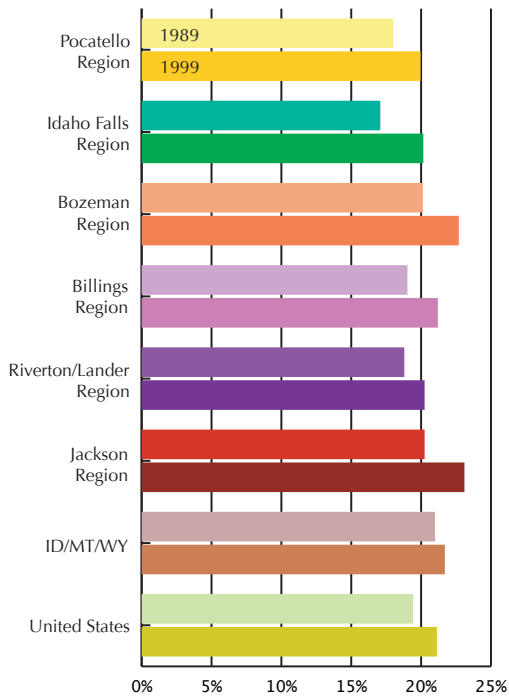
This measure does not reveal how many renters and homeowners in each county spend more than 30 percent of their income on housing and utilities. The U.S. Census collects

these data only for larger population centers. Thus, data are not available for every county in the Yellowstone-Teton region. However, statewide averages suggest that a significant share of the region's homeowners—and a larger share of renters—lives in housing that is beyond its means. (See p. 13, lower left.)

### Implications and Questions

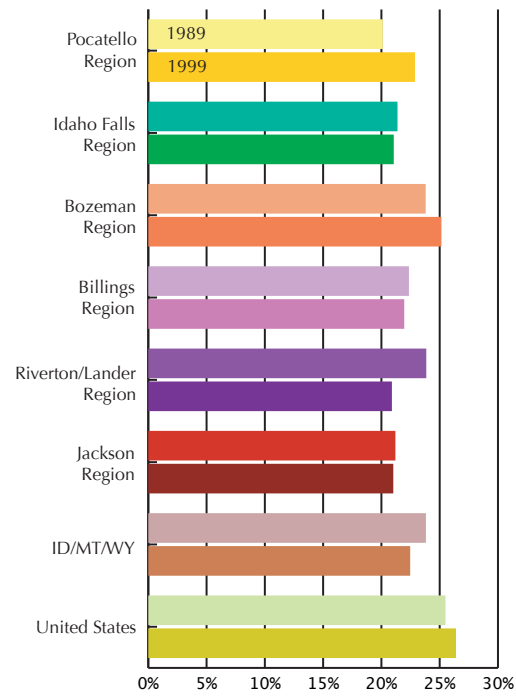
Are there ways in which communities, subregions, or the region as a whole can take advantage of the current economic vitality to create more housing stock that is affordable at local income levels? How can communities create permanently affordable housing without relying on government subsidies?

**Selected Homeowner Costs\* as a Share of Median Household Income**



Source: U.S. Census Bureau

**Median Rent as a Share of Median Household Income**



Source: U.S. Census Bureau

\* Includes mortgage, insurance, taxes, utilities and household fuel costs.

## Health insurance coverage less common in rural counties than in urban centers

Across the United States, health care costs are rising rapidly. In 2004, spending on health care grew at three times the rate of inflation. At the same time, the number of uninsured continues to rise.

Most Americans obtain health insurance through their employers. But several trends—all of which are at play in the Yellowstone-Teton region—have converged to make employee coverage less likely:

- Growing reliance on part-time and contract workers;
- Growing importance of the service sector, which offers less access to health insurance than the manufacturing and government sectors;
- Disproportionate growth in jobs among proprietors and in small firms; and
- Skyrocketing insurance costs.

The share of the population without health insurance varies across the Yellowstone-Teton region (see chart below, at right). Coverage rates tend to be higher in the urban counties, and lower in the surrounding areas.

These data provide a snapshot, but do not show change over time. Nationwide, the number of uninsured rose 15 percent between 2000 and 2004.

Also, these data do not address the large number of persons who have inadequate health insurance coverage. Recent estimates suggest that some nine percent of U.S. adults between the ages of 19 and 65 may be underinsured.

### Implications and Questions

Persons without adequate insurance tend to receive less preventive care, be diagnosed later in the course of a disease, receive less therapeutic care, and have higher mortality rates than well-insured individuals. In addition, lack of insurance can lead to unmanageable medical bills. What resources does the Yellowstone-Teton region have to address this problem? How can communities work together to expand or better support organizations that provide access to ongoing, high-quality health care even for the uninsured or underinsured?

### Households spending 30% or more of household income for rent or mortgage and utilities, 2005

	Owners	Renters
<b>Bannock Co.</b>	23.6%	52.3%
<b>Bonneville</b>	24.1%	30.3%
<b>Gallatin</b>	35.3%	43.9%
<b>Yellowstone</b>	29.1%	46.9%
<b>Idaho</b>	32.0%	42.2%
<b>Montana</b>	34.4%	40.3%
<b>Wyoming</b>	25.5%	30.6%

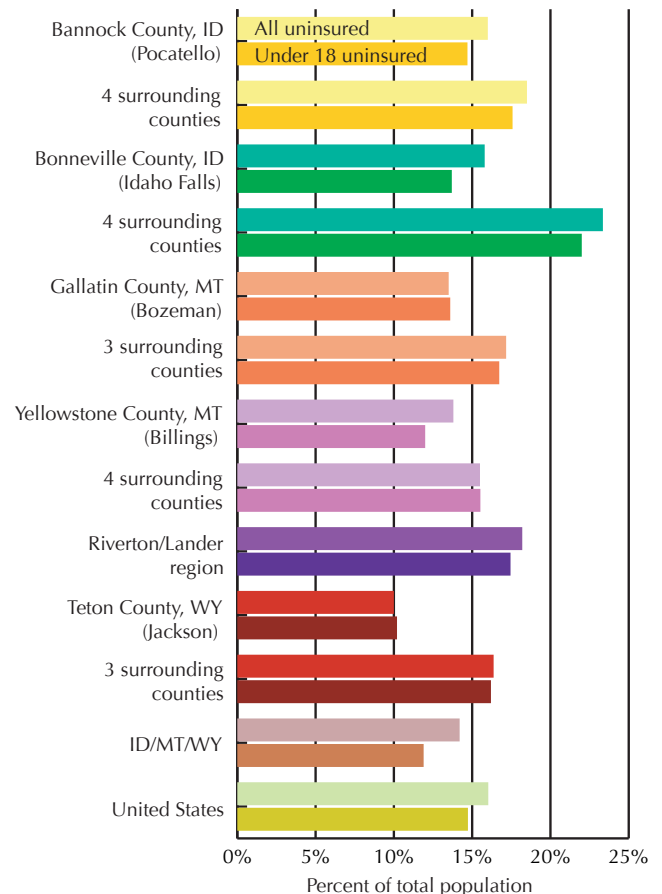
Source: U.S. Census Bureau, 2005 American Community Survey

### Renters unable to afford fair market rent for a two-bedroom unit, 2005

<b>Idaho</b>	<b>52.3%</b>
<b>Montana</b>	<b>30.3%</b>
<b>Wyoming</b>	<b>43.9%</b>

Source: National Low Income Housing Association, *Out of Reach* 2006. See Technical Appendix B for county detail.

### Lack of Health Insurance Coverage within the Total Population and Among Children, 2000



Source: U.S. Census Bureau, Small Area Health Insurance Estimates. See Technical Appendix B for county detail.

# Seasonality

## Seasonal patterns in employment more pronounced in rural areas than in urban centers

Labor force (number of people available to work) and employment (number working) fluctuate in a regular seasonal pattern in the 21 rural counties of the Yellowstone-Teton region. Both labor force and employment peak during the summer and are lowest in mid-winter. Over time, these fluctuations have become less significant in relation to the growing base of employment. However, a pronounced seasonal pattern remains.

This analysis suggests that seasonality is not a major concern for the cities at the periphery of the region and their counties (Bannock and Bonneville counties in Idaho, and Gallatin and Yellowstone counties in Montana).

### Implications and Questions

This analysis does not reveal the cause of seasonal labor force fluctuations. Part of this pattern could be caused by area residents going in and out of the labor force seasonally (not looking for employment). How well are area residents able to generate a year-round income from seasonal jobs? Would smoothing out the fluctuations create better economies and livelihoods? If so, what stimuli might help achieve this?

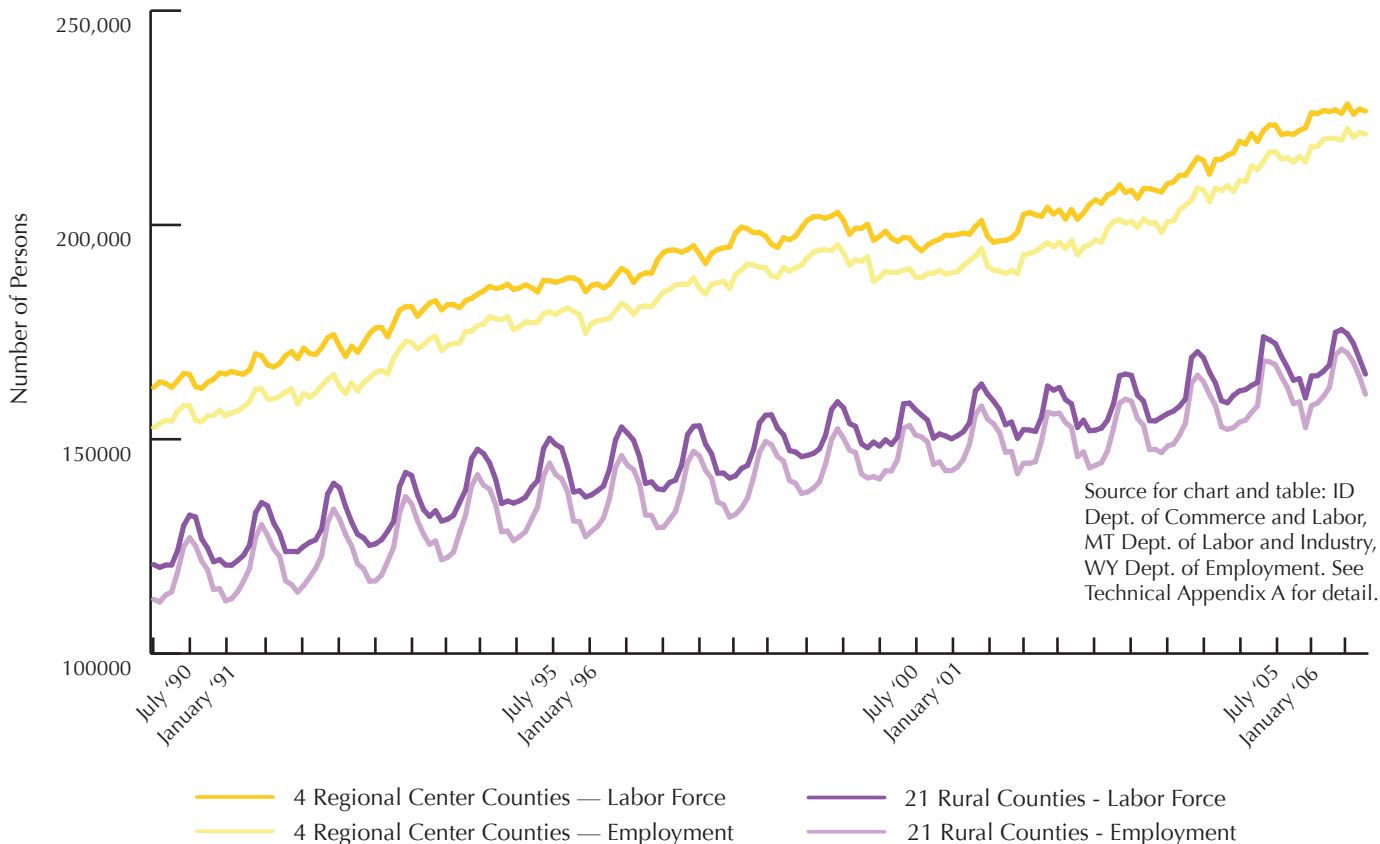
### Ten Most Seasonal County Economies

This table shows fluctuations in numbers of persons employed (from the January low to the July high) as a percentage of January base employment. In Teton County, Wyoming, for example, July employment exceeded January employment by 50 percent in 1990/91. By 2005/06, summer employment was only 24 percent greater than in winter. Seasonal fluctuations decreased by 52 percent.

	1990/91	2005/06	% increase or decrease
Teton WY	50.0%	24.1%	52%
Teton ID	27.0%	23.3%	10%
Park WY	34.8%	23.2%	33%
Park MT	16.8%	16.5%	2%
Madison ID	-7.2%	16.3%	320%
Fremont ID	26.4%	16.3%	38%
Madison MT	30.3%	15.4%	49%
Bear Lake ID	7.6%	13.2%	73%
Hot Spgs ID	3.5%	9.8%	180%
Beaverhd MT	13.1%	9.5%	27%

Seasonality declined
  Seasonality increased

Labor Force and Employment Trends in Urban and Rural Counties



## Growth in vehicle travel mixed around the region, seasonal fluctuations continue

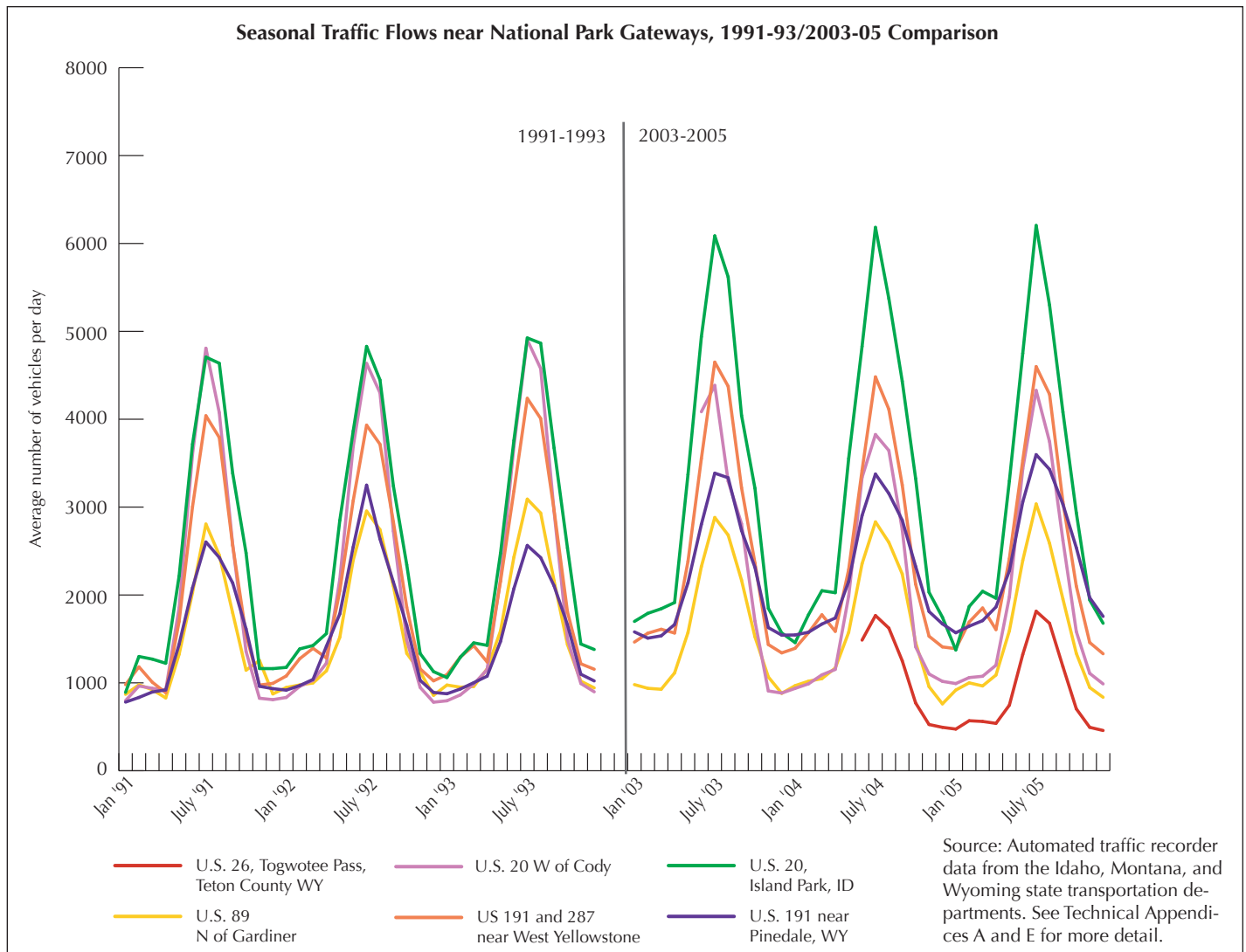
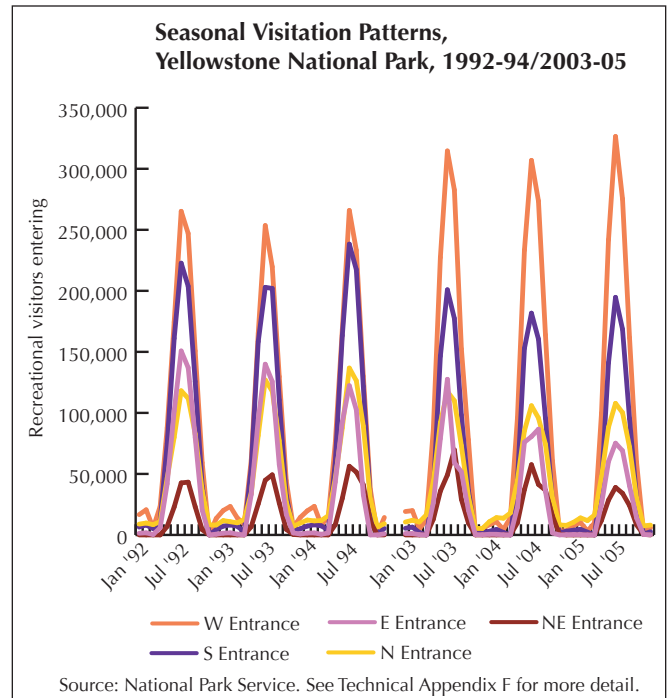
Traffic flow on highways leading through some of the main national park gateways shows a strong seasonal pattern. This pattern closely resembles that of Yellowstone National Park visitation.

Between the early 1990s and the mid-2000s, the average number of vehicles has changed for most highway segments. However, the seasonal pattern has continued. Base winter traffic flow increased on some of the highways leading to and from communities near the parks (e.g., U.S. 191 near Pinedale and U.S. 191/287 near West Yellowstone).

The large increase in Yellowstone visitors entering through the west gate corresponds with a growth in summer traffic through Island Park, Idaho, and a smaller boost at U.S. 191 and U.S. 287 in Montana, near West Yellowstone.

Seasonal patterns also play out on highways elsewhere in the region.

(continued next page)



On major highways around the region's periphery, regular seasonal swings are evidenced. Traffic flows are highest in mid-summer and lowest through the winter.

Traffic flow patterns near major ski resorts reflect a shoulder season dynamic. Compared to the park gateways shown on the previous page, Jackson, Wyoming, and Big Sky, Montana, enjoy brief slack seasons. These occur in late fall and late spring. This is a typical winter resort slack season pattern, not unique to Jackson and Big Sky.

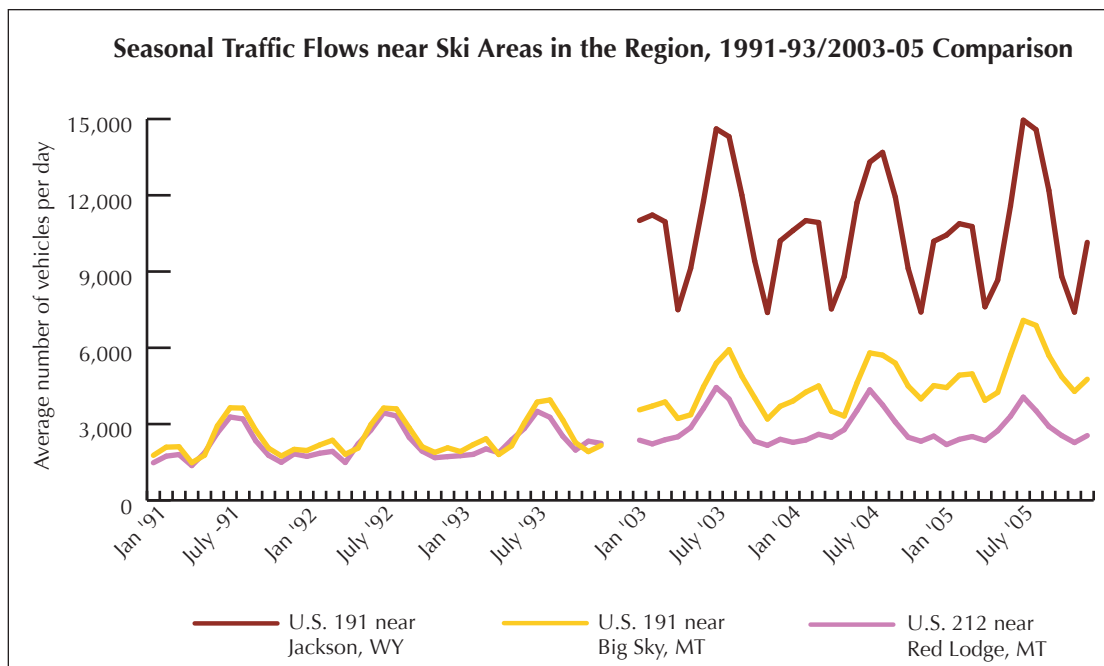
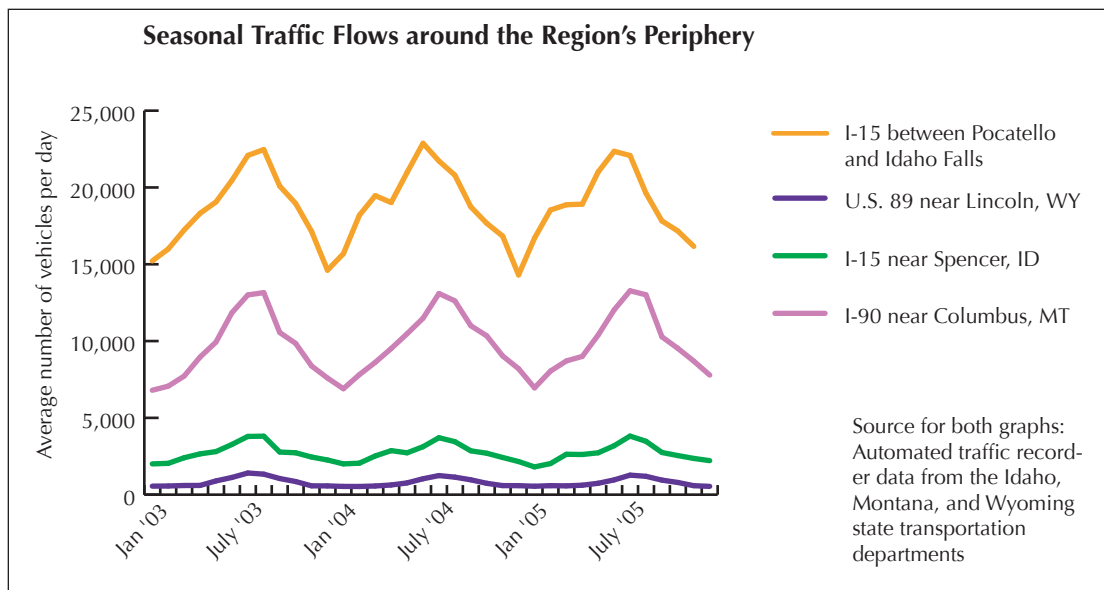
### Implications and Questions

The pattern similarity between park visitation and traffic flow to the surrounding gateways does not reveal the extent to which keeping the parks open year-round would affect

visitation during the off-season. What level of additional off-season activity would make a meaningful difference in these communities so affected by proximity to the parks?

A higher baseline of vehicle use on U.S. 191 near Big Sky suggests the influence of a growing year-round population. To a lesser extent, this influence is also evident near Red Lodge. How can all communities better tap this growing regional population to provide a higher level of activity during the off-season?

Could the parks and surrounding areas function more like winter resorts in terms of their off-season draw? What would it take to make that happen? Would this be good for park resources and wildlife?



## Commercial enplanements reflect seasonal patterns at some airports

Enplanements (the number of passengers departing from an airport) are a measure of commercial air travel. Air travel exhibits seasonal fluctuations at the region's largest airports, as well as Yellowstone Regional airport in Cody, Wyoming.

Enplanements at airports at Jackson and Bozeman evidence two slack seasons and two high seasons, consistent with proximity to ski areas and summer recreation.

Enplanements in Billings, Idaho Falls, and Cody show a summer high season only. Summers bring a small bump in air travel at Riverton. The airport at West Yellowstone is open during the summer only.

In Pocatello, there is little month-to-month fluctuation in air travel, and the fluctuations do not exhibit a seasonal pattern.

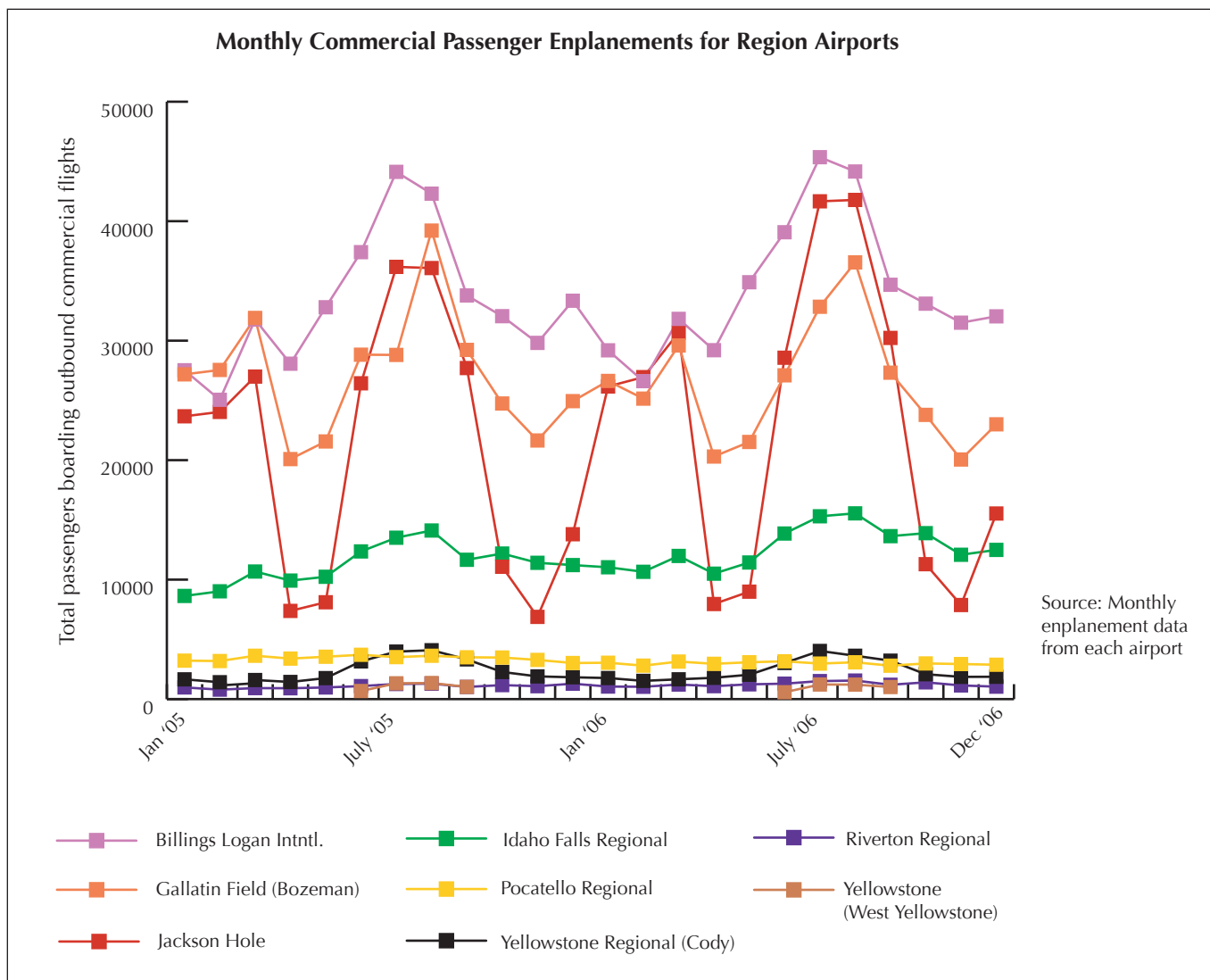
For more than 15 years, the Jackson community has provided minimum revenue guarantees for winter airline service. An estimated \$16 million of locally collected funds has been

paid through this program, which is administered through a nonprofit corporation. Between 1985 and 2005, enplanements grew from 50,000 to 248,000. Winter enplanements alone generate an estimated \$75 to \$100 million in sales tax revenue for the area, so businesses have had a clear incentive to support good air service by contributing to the fund.

### Implications and Questions

Would local revenue guarantees benefit any of the other communities in the region?

Do the region's larger airports take traffic away from the smaller airports, putting pressure on the long-term availability of community air service?



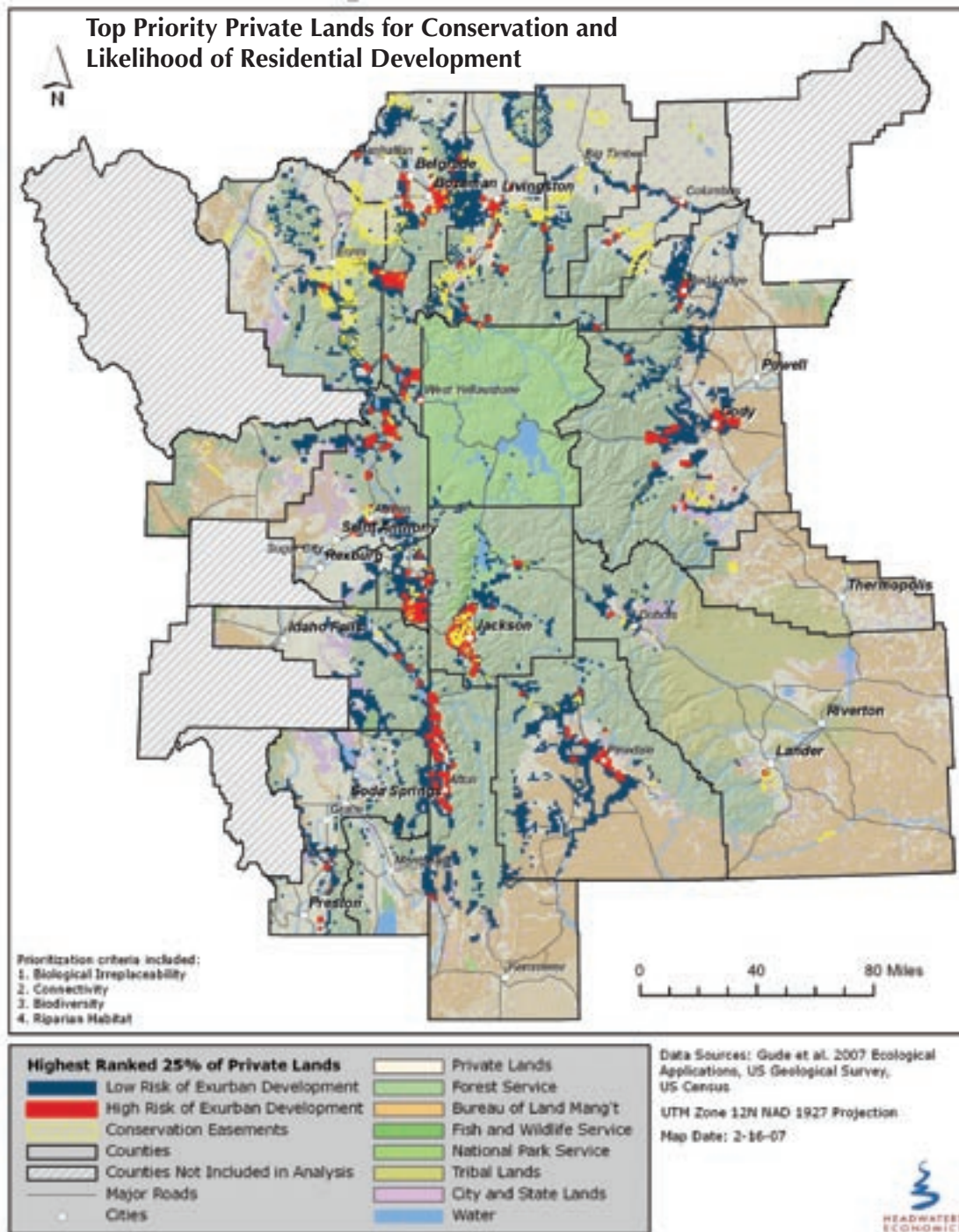
# Natural Assets and Opportunities

## Residential development likely on ecologically valuable lands in rapidly growing areas

The Greater Yellowstone ecosystem is the heart of the Yellowstone-Teton region. Much of it is protected on public lands, but areas critical to wildlife are also found on private lands. The map below shows where the most ecologically valuable private lands in the region are, and where they are likely to be developed by 2020. The map also shows existing conservation easements.

### Implications and Questions

Land use plans and policies that apply to private lands in the region's counties generally provide minimal protection for prime farm ground, wildlife habitat and migration corridors, scenic vistas and aquatic resources. How can communities do a better job of managing residential and commercial development to conserve their natural resources and maintain their overall quality of life?



Notes: Conservation priority lands were identified using four indices of ecological value. These indices cover biological irreplaceability, habitat connectivity, biodiversity, and riparian habitat (which is concentrated on private lands). See Technical Appendix G for more detail.

Residential development refers to the conversion of land from agricultural housing densities (>40 acre lot size) to exurban densities (<40 acre lot size). These projections were made using zoning and land use policies from the early 2000s.

Conservation easement data: Montana, 2006; Idaho and Wyoming, 2001.

Counties with highest percentage of private lands in the "top conservation priority" and "high risk of development" categories:

Teton WY	18%
Teton ID	9%
Gallatin MT	4%
Lincoln WY	4%
Fremont ID	3%
Park WY	2%

See Technical Appendix G for more detail.



## Average size of agricultural land holdings declining dramatically

Agricultural lands comprise nearly all of the region's private land. Farms and ranches create value in the region—through employment and production, contribution to the region's character, and protecting wildlife and open space.

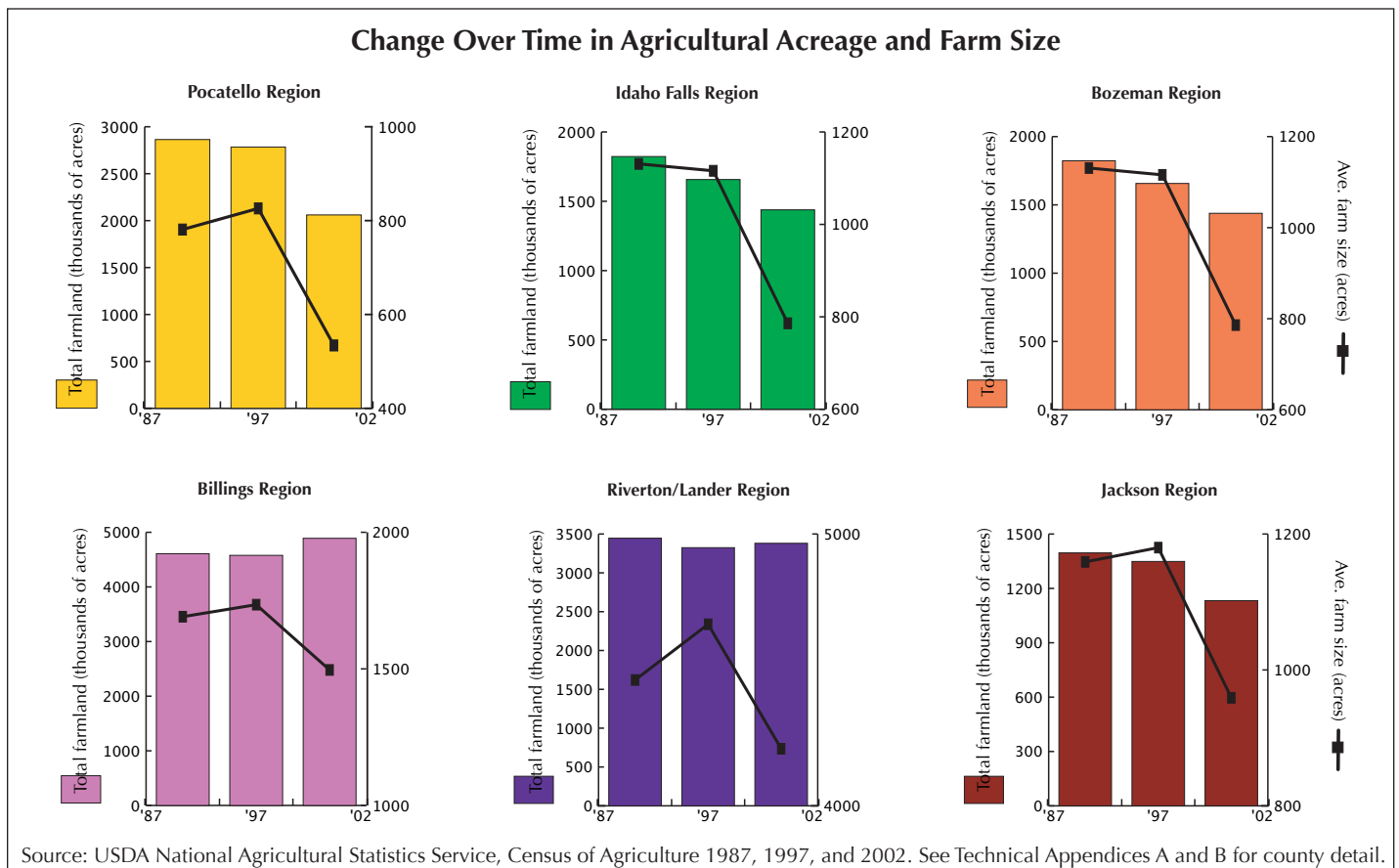
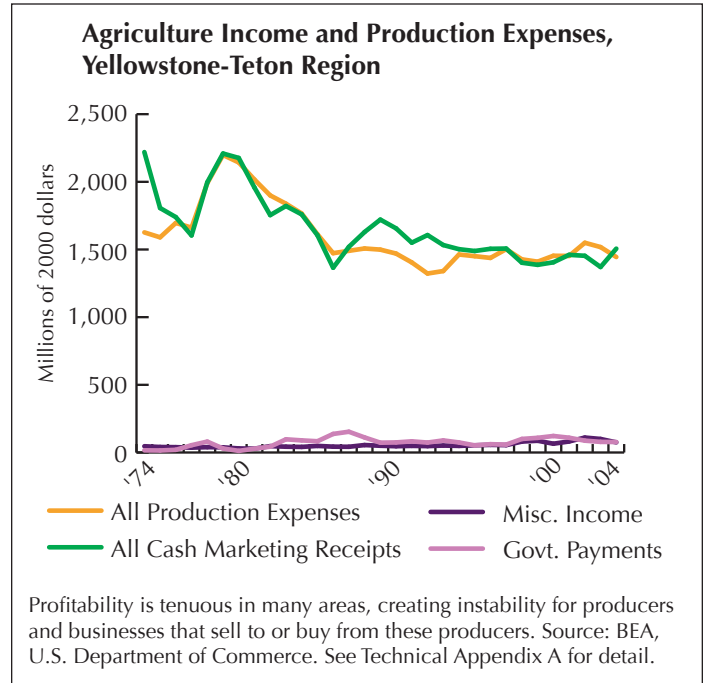
Average farm sizes dropped significantly between 1997 and 2002. This trend reflects fragmentation of large holdings into smaller parcels, and, in some cases, a change in the type of ownership and operation. Agricultural lands include those oriented toward commercial production, as well as "lifestyle" operations maintained primarily for enjoyment or hobby. In parts of the region, this type of ownership is expanding.

In 2002, nearly three-quarters of the region's agricultural land was in holdings larger than 2,000 acres. In number, these largest operations represent only ten percent of the region's farms and ranches. By contrast, the smallest operations represent about one-third of the number of farms and ranches, but control less than one percent of the land base.

### Implications and Questions

These data do not reveal where the fragmentation is occurring and where it may pose a threat to important community or landscape values. Taking a strategic view, which agricultural lands are most important to protect? What approaches will work with holdings of different sizes and ownership?

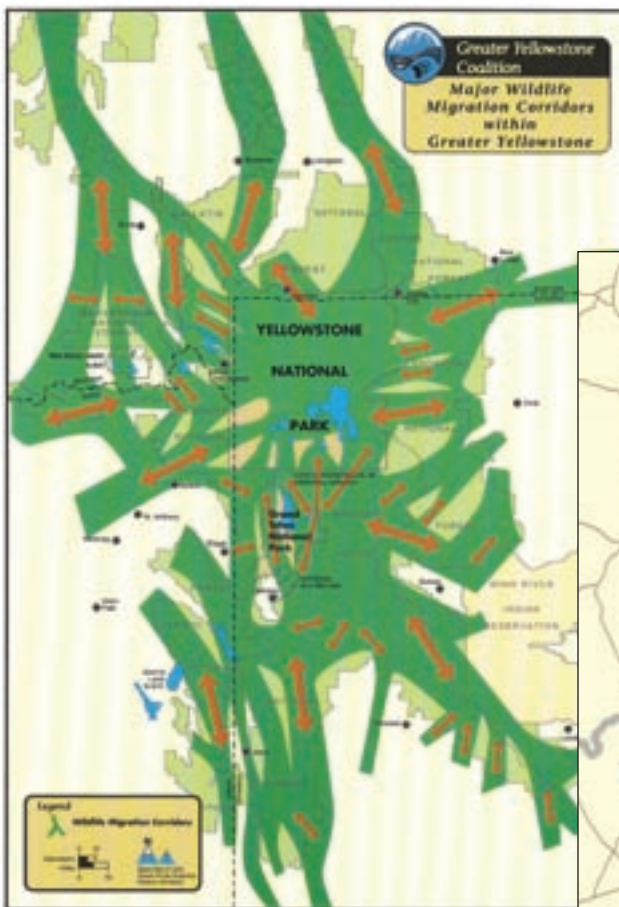
Farming and food processing are economic staples in some parts of the region. What might loss of productive lands mean for these communities? What might the implications be for wildlife habitat, water management, and future alternative energy options such as wind farms and biofuels?



## Public lands essential to wildlife, but some areas provide better habitat than others

At the heart of the Yellowstone-Teton region is a core of public lands. Together, these national parks, forests, and wildlife refuges comprise more than 13 million acres. As the generalized map of migration corridors below shows, these lands are essential habitat and key links in the ability of wildlife to move between habitat areas, including summer and wintering grounds.

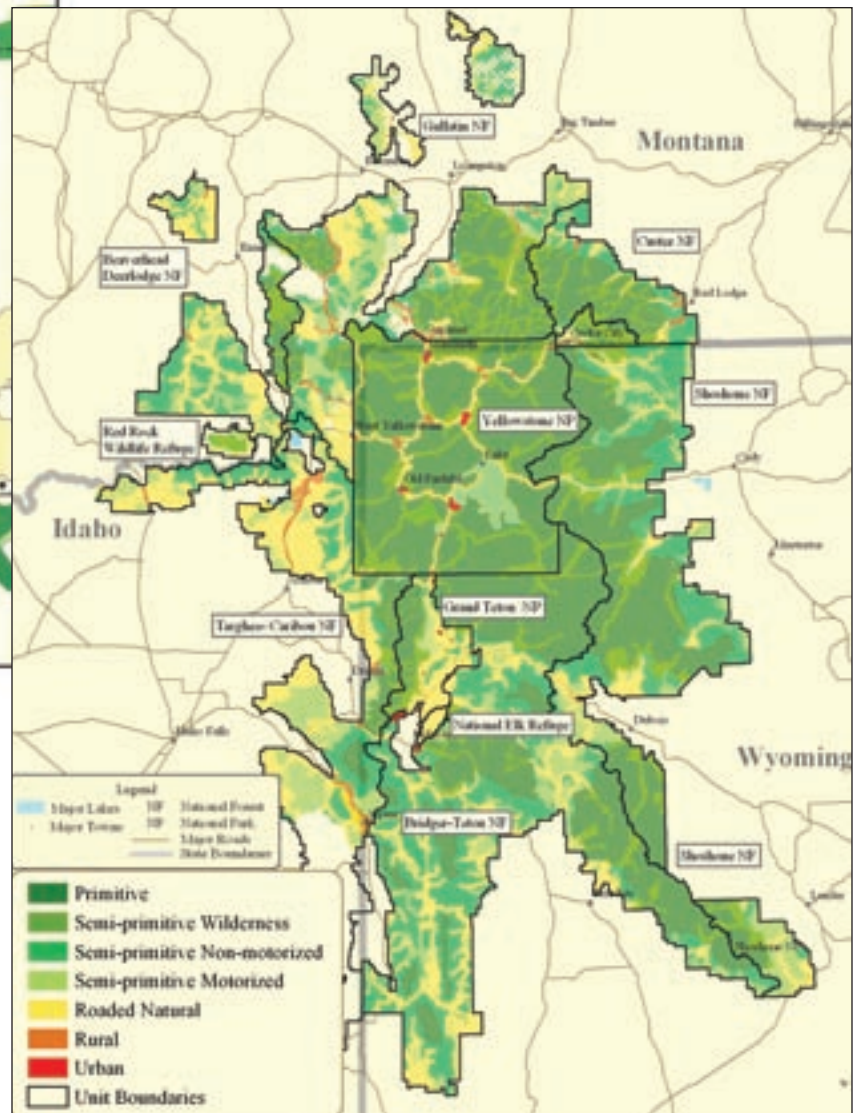
### General Wildlife Migration Corridors



Different management goals and regimes mean that some public lands offer more secure habitat than others. The “recreation opportunity spectrum” (ROS) map below suggests some of these management differences. For example, the western part of the region tends to be more heavily roaded than many other areas. Yellowstone park and the national forest and wilderness areas in the northeastern part of the region tend to provide larger blocks of habitat.

Many wildlife species (including grizzly bears and elk) are sensitive to roads and the activities associated with them. Thus, the ROS map provides one way of looking at habitat quality on these public lands.

### Land Classifications under the Recreational Opportunity Spectrum



#### Recreation Opportunity Spectrum Definitions

**Primitive**—Areas of over 5,000 acres and at least three miles from the nearest road.

**Semi-primitive wilderness**—Designated or proposed wilderness areas over 2,500 acres, even near roads.

**Semi-primitive nonmotorized**—Areas of over 2,500 acres and at least 1/2 mile from the nearest road or trail with motorized use.

**Semi-primitive motorized**—Areas of at least 2,500 acres and 1/2 mile from the nearest road (largely corridors along unimproved roads, motorized trails, and lakes open to motorboats).

**Roaded natural**—Primary road corridors in natural settings, usually 1/2 mile to one mile wide.

**Rural**—Roaded settings with a pastoral feel.

**Urban**—Highly developed centers such as resorts.

Source: Upper left, Greater Yellowstone Coalition; Lower right, Greater Yellowstone Coordinating Committee, map by Henry Shovic. For more detail, see Technical Appendices G and H.

## Outdoor and heritage activities top visitor recreation preferences

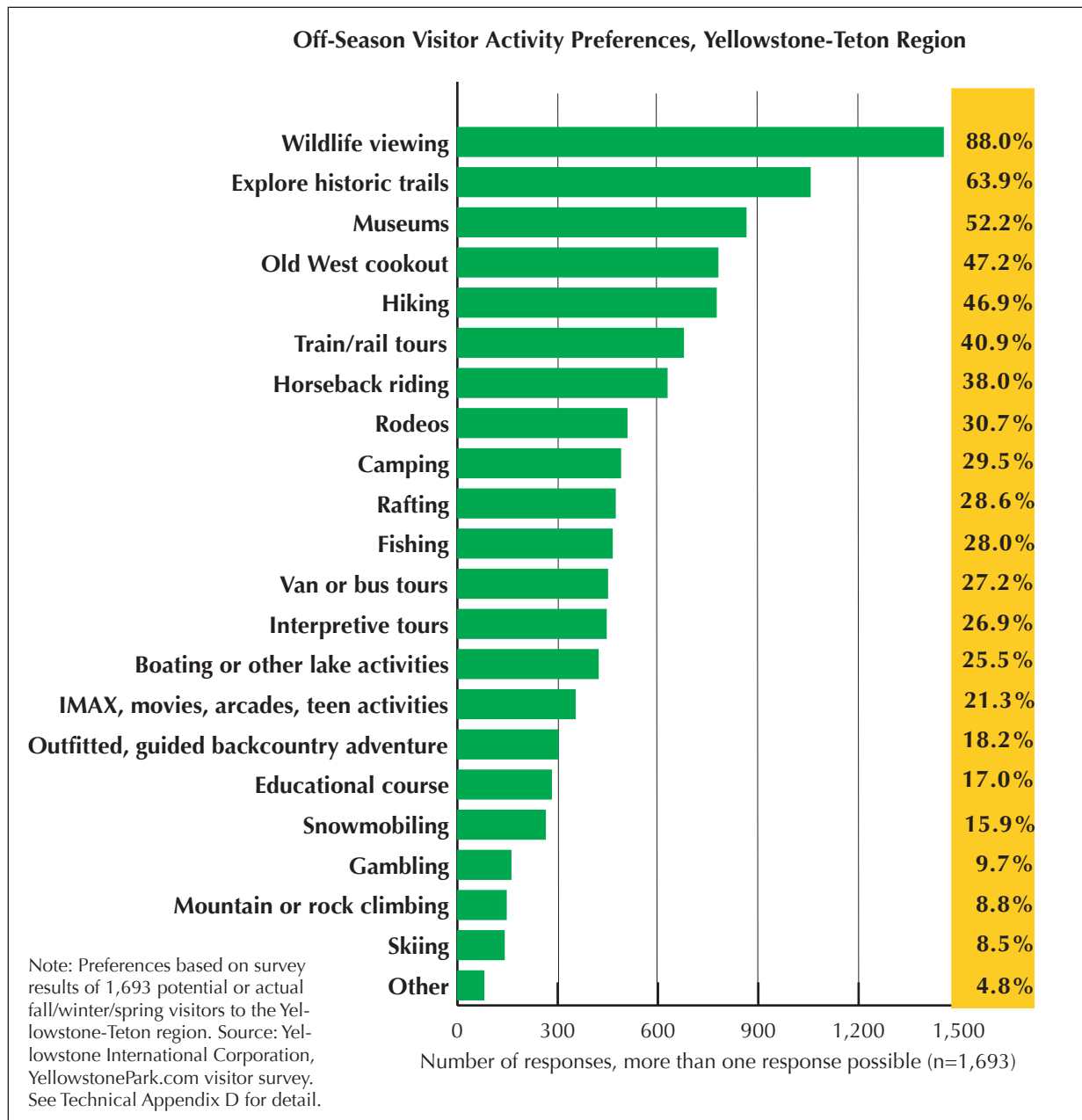
Recreation is big business in the Yellowstone-Teton region. One study suggests the economic value of cutthroat trout fishing, rafting, and other recreation on the Upper Snake River in Wyoming and Idaho nears \$40 million per year. Another study estimates that, in six counties close to Yellowstone park, big game hunters spend \$26 million annually and nonresident wildlife watchers spend \$83 million.

The chart below shows preferred activities for off-season visitors and potential visitors. These responses overlap with other recreation research, which suggests that the most popular recreational activities in the off-season are wildlife

watching, walking, and recreational shopping. (See Technical Appendix H for existing studies on seasonal and location-specific recreation preferences.)

### Implications and Questions

Existing research on seasonal recreation patterns specific to areas within this region is slim. How might better information about how residents and nonresidents recreate during different seasons contribute to building off-season activity? What other information might help? How might we better understand the value of natural areas and resources to those who recreate here?



## Certain types of recreation projected to boom

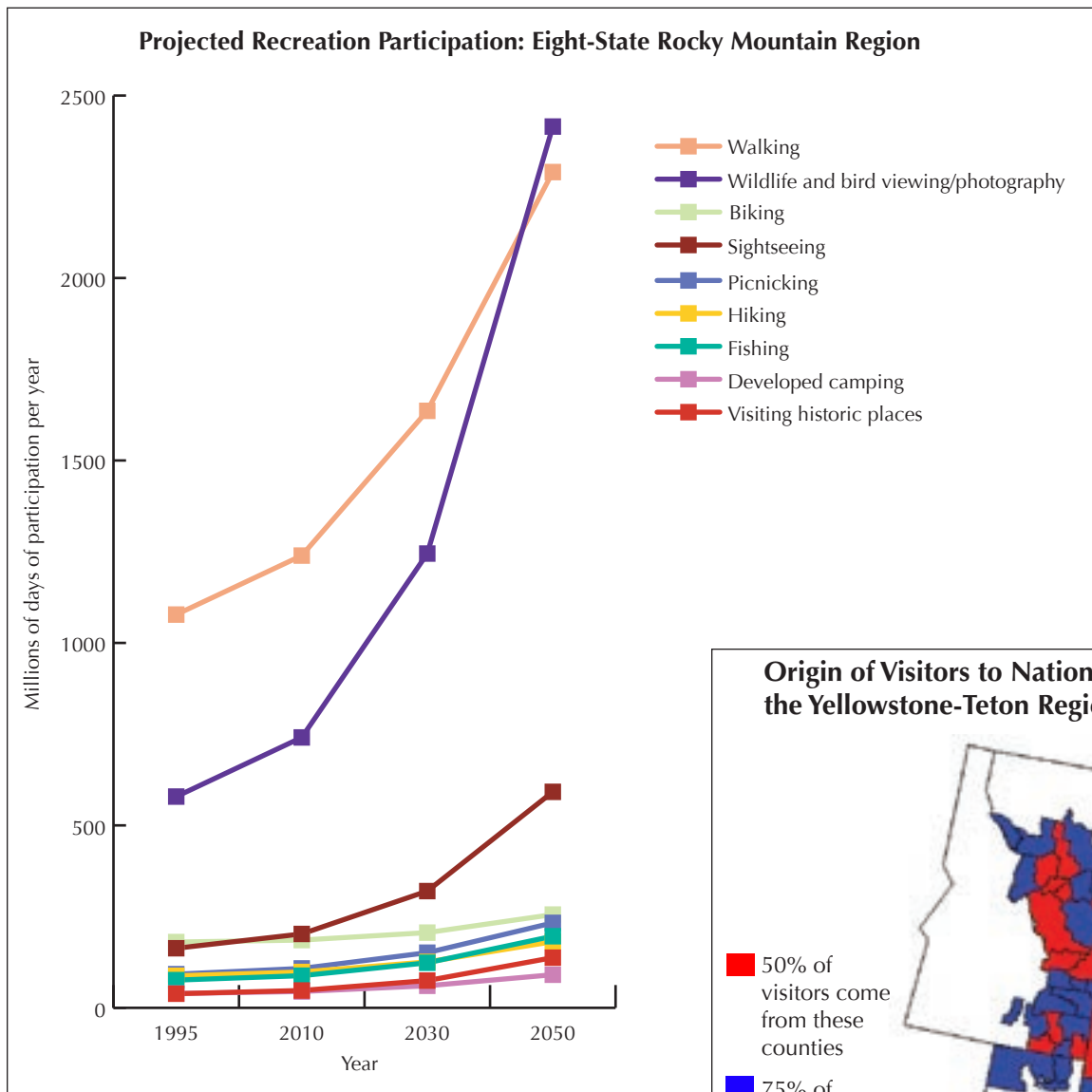
A variety of factors will likely affect recreation demand and preferences over time. Among these are population growth, aging, and income levels; technological changes; and proximity to, and availability of, opportunities. Across the Rocky Mountain West, participation in walking and wildlife viewing is projected to skyrocket in the years leading up to 2050.

In the Yellowstone-Teton region, population growth by itself will intensify recreation demands. While national park visitors come from all over the world, the majority of visitors to the region's national forests live nearby. The same pattern is likely true for BLM, state, and local government lands.

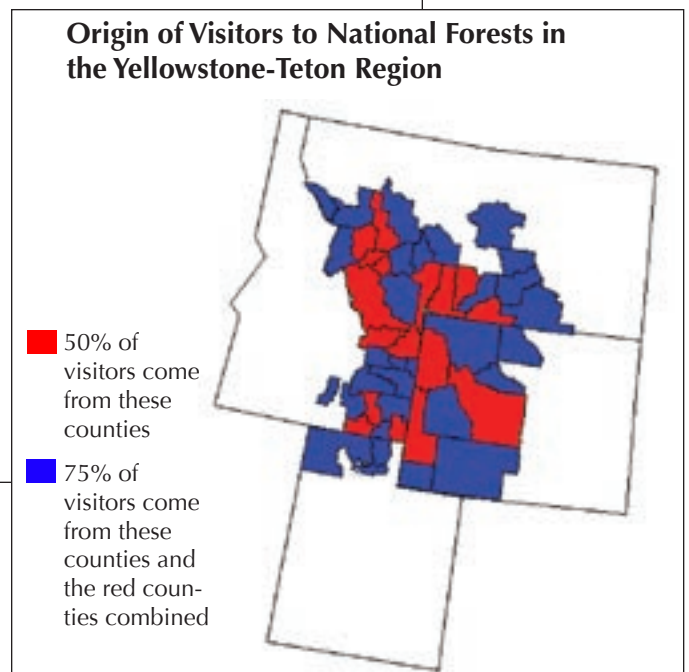
These data do not reveal the growth of niche forms of recreation that might support additional economic activity in the region. These activities include ice climbing, extreme sports, off-road vehicle riding, mountain biking, and kayaking.

### Implications and Questions

How can our public lands best accommodate intensifying and changing recreation demands, while sustaining other qualities such as wildlife habitat and water quality? Where will funding come from to support increasing recreation use? What opportunities exist to leverage existing assets or make investments to meet future recreation demand?



Source for chart and map: Greater Yellowstone Coordinating Committee, 2006. *Recreation in the Greater Yellowstone Area—Technical Report.*



## Availability of popular forms of recreation varies by landowner or management agency

The Yellowstone-Teton region's core of National Park Service and U.S. Forest Service lands offers the greatest concentration and abundance of recreation opportunities. Other public and private lands also contribute to the overall supply. In many ways, these offerings complement what is available on national park and national forest lands.

Some forms of recreation are widely accessible around the region. Others are more scarce, limited to specific geographic locations or terrain types, or restricted by management policies that affect land use or access.

### Implications and Questions

These estimates do not reflect the quality of the recreational opportunities, nor the availability of funding for maintenance, staffing and improvements.

How can public agencies and private landowners better collaborate to meet the recreation demands of the region's growing population? As recreation preferences shift, what new facilities that will be needed or beneficial? Which services are private landowners best positioned to provide?

**Abundance of Recreational Opportunities by Land Management Entity**

Activity	NPS	USFS	BLM	State/ County	Private
Developed camping	3	3	1	1	2
Wildlife viewing	3	3	3	3	2
Fishing	3	3	3	3	2
Hunting	0	3	3	1	1
Trail bike riding	0	3	3	2	0
Mountain bike riding	1	3	3	2	1
ATV riding	0	3	3	1	1
4-wheeling	0	3	3	1	1
Driving to enjoy scenery	3	3	3	1	0
Hiking	3	3	3	2	1
Whitewater rafting and kayak	0	3	1	1	1
Other kayak, floating, boating	2	3	2	3	1
Hot springs soaking	1	2	0	1	2
Caving	0	1	1	1	0
History study	3	2	2	2	2
Native American study	2	1	1	1	0
Downhill skiing	0	3	0	0	2
Cross-country skiing	3	3	1	3	2
Snowmobiling	2	3	1	1	0-1

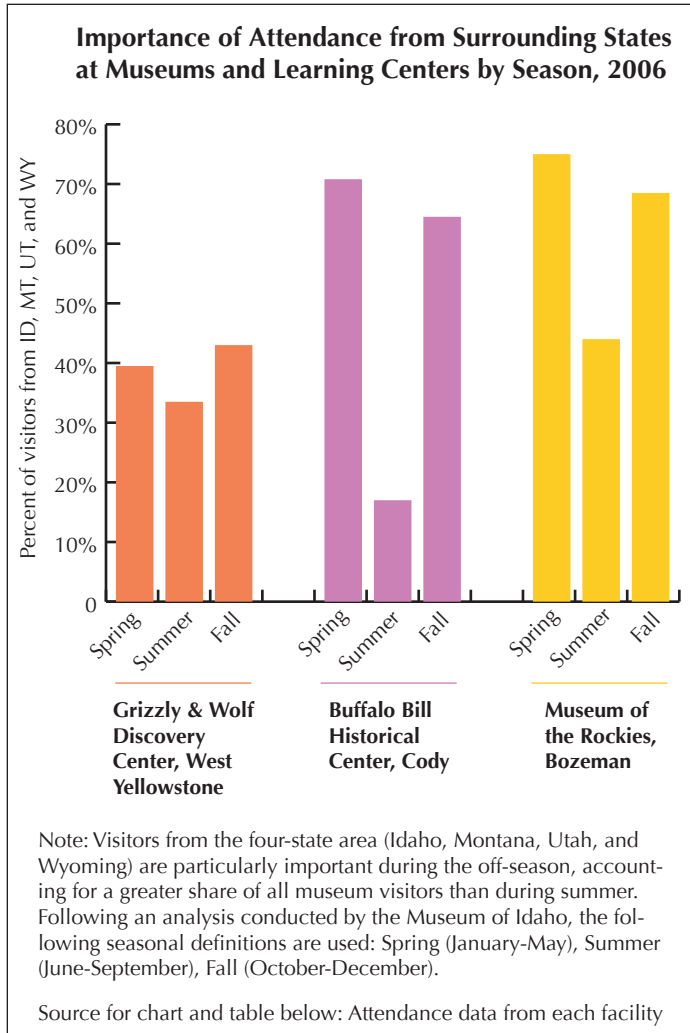
0  3  
 Nonexistent or extremely rare      Common to abundant

Source: Adapted from Greater Yellowstone Coordinating Committee, 2006. *Recreation in the Greater Yellowstone Area—Technical Report.*

# Educational and Cultural Assets and Opportunities

## Attendance from within the region is key fall through spring at museums and learning centers

Visitor numbers vary dramatically throughout the year at many of the region's museums and learning centers. Residents of a four-state area (Idaho, Montana, Utah, and Wyoming) comprise a critical audience for these centers, especially outside the summer months.



During the spring and fall seasons, two-thirds of Museum of Idaho visitors come from within a 50-mile radius of the museum's location in Idaho Falls. During the summer, that share drops to one-third.

An analysis of visitation has helped the Museum of Idaho identify three distinct audiences: traditional tourists, regional tourists, and locals. Spring visitation is dominated by local and regional tourists, and summer by traditional (out-of-region) tourists. Fall is the museum's slowest season.

This analysis helped museum staff focus on types of exhibits to emphasize during different seasons. Summer exhibits should cater to out-of-area tourists by highlighting local and western themes. Spring exhibits should offer something more exotic for visitors from the region. Fall exhibits might focus on topics of interest to school groups, in order to help boost attendance.

### Implications and Questions

Educational and cultural organizations may do well to tap the region's growing population as a resource or market. This may require a deeper look into preferences and seasonal constraints, as well as strategic thinking and planning.

**Difference Between Low Attendance Month and High Attendance Month, 2005**

	Low Attendance in 2005	High Attendance in 2005	Factor
Grizzly and Wolf Discovery Center	November 1,819	July 29,326	16x
Buffalo Bill Historical Center	December 345	July 18,082	52x
Museum of the Rockies	January 1,753	July 13,056	7 1/2x

## Enrollment trends vary among two- and four-year colleges and universities

Enrollment at most colleges and universities across the region is growing more slowly than nationwide averages. Between 1999 and 2004, enrollment in both two-year and four-year higher education programs in the United States grew by 17 percent.

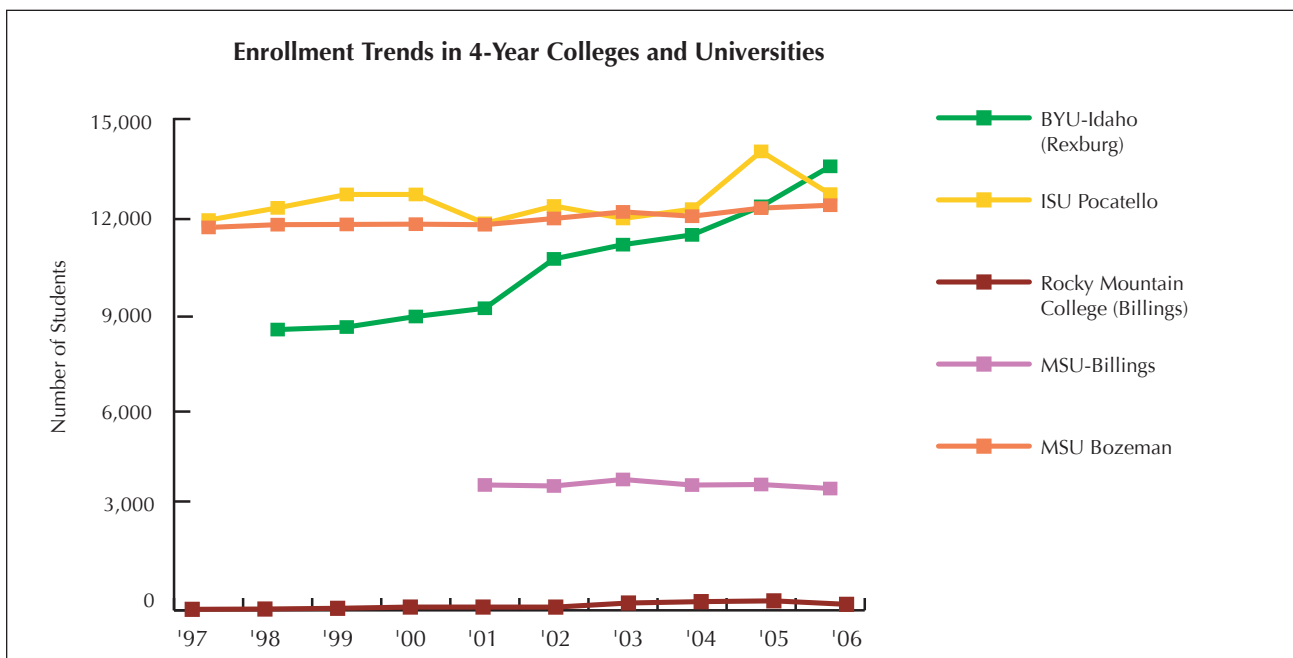
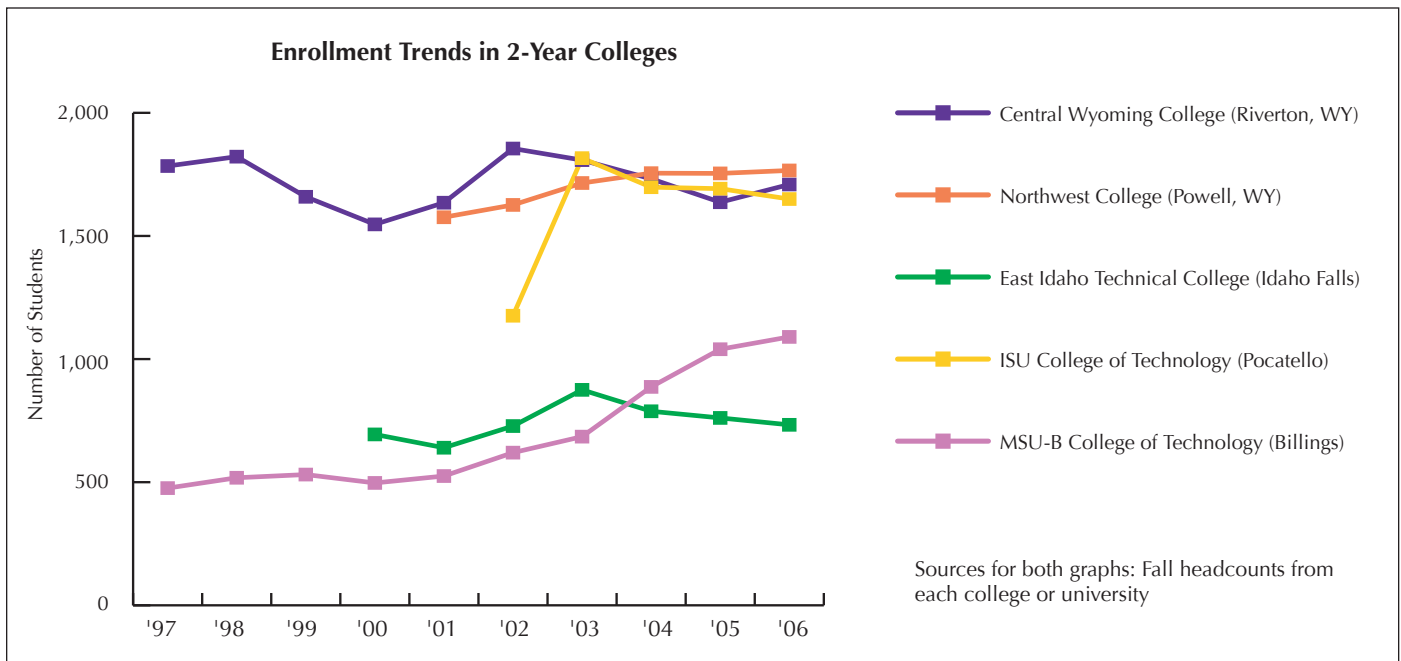
Available enrollment data since 1997 show that two of the region's institutions lost students: Montana State University-Billings, and Central Wyoming College in Riverton.

Two institutions grew at rates far surpassing the national average: BYU-Idaho in Rexburg grew 58 percent, as its transition into a full-fledged university unfolded; and the

Montana State University-Billings College of Technology more than doubled its student body.

### Implications and Questions

What accounts for the slow growth at many colleges and universities? Failure to increase capacity and stagnant state funding support are two possible causes. How can the region contribute to a new vitality for its institutions of higher education? What is the potential for "Earn and Learn" programs that combine seasonal employment with affordable education opportunities for those in technical trades or seeking a second career?



# Health Care Assets and Opportunities

## Many long-term care facilities close to capacity while hospitals have room to spare

In the Yellowstone-Teton region, a growing and aging population requires an expanding health care sector. Health services—already one of the fastest-growing segments of the economy—will continue to grow rapidly. Health services are concentrated in the more populated urban centers, as the table below indicates.

Long-term care facilities include nursing homes, assisted living, and rehabilitation and transitional care centers. Across the region, these tend to operate at two-thirds to three-quarters of capacity. A quarter of the 33 Montana and Wyoming facilities maintained a occupancy rate of above 90 percent in 2005. (Occupancy data are not available from the Idaho Department of Health and Welfare.)

The region's hospitals, especially critical access hospitals, tend to operate at a lower share of their capacity. In 2005, no

hospital exceeded a 70 percent occupancy rate. No critical access hospital exceeded 49 percent, and three of the eight Montana and Wyoming facilities operated in single digits.

Critical access hospitals provide emergency services and short-term hospital care for residents that live more than 35 miles from another hospital. They are small facilities with a limited medical role. Operating at low percentage of capacity is expected.

### Implications and Questions

Projections for an increasingly older population suggest the need for careful planning of medical services. What kinds of health care and supportive services do communities need to be creating and integrating now to accommodate the needs of an aging population?

**Hospitals and Long-Term Care Facilities, Beds, and Occupancy, 2005**

	Long-Term Care Facilities	Total Beds /Average % Occupancy 2005	Hospitals + Critical Access Hospitals	Total Beds /Average % Occupancy 2005
<b>Pocatello Region</b>				
Pocatello	3	263 beds n/a	2	262 beds n/a
Surrounding area	4	194 beds n/a	1 + 5 CAH	205 beds n/a
<b>Idaho Falls Region</b>				
Idaho Falls	4	346 beds n/a	3	282 beds n/a
Surrounding area	2	157 beds n/a	1	49 beds n/a
<b>Bozeman Region</b>				
Bozeman	3	283 beds 72%	1	86 beds 58%
Surrounding area	1	115 beds 52%	2	25 beds 40%
<b>Billings Region</b>				
Billings	9	890 beds 79%	2	493 beds 67%
Surrounding area	10	632 beds 76%	5 CAH	110 beds 19%
<b>Riverton/Lander Region</b>				
	4	308 beds 72%	2 + 1 CAH	184 beds 26%
<b>Jackson Region</b>				
Jackson	2	125 beds 62%	1	52 beds 48%
Surrounding area	4	134 beds 83%	1	13 beds n/a

Note: Occupancy data are not available from the Idaho Department of Health and Welfare. Percent occupancy for hospitals is an average that includes both hospitals and critical access hospitals where both exist in a subregion.

Source: Idaho Department of Health and Welfare, Facilities Standards Bureau; Montana Department of Public Health and Human Services, Quality Assurance Division; Wyoming Department of Health, Office of Healthcare Licensing and Surveys. See Technical Appendix J for detail.

## Primary health care stretched thin in many parts of the region

Primary care providers are the first point of contact for patients who need medical assistance. Primary care physicians are typically general practitioners or pediatricians who are based in a community, rather than at a hospital.

Nurses, pharmacists, dentists, optometrists, midwives, physical and occupational therapists, and other professionals whose services are community-based are also considered primary care providers

Health professionals who provided these services are in short supply in many of the Yellowstone-Teton region's communities. The table below shows which of the region's counties contain health professional shortage areas—in which the

need for medical primary care services or dental services outstrips the availability of professionals to provide these services.

### Implications and Questions

Health care is among the most basic of essential services, yet access is difficult in many parts of the region. Are there collaborative approaches that might help the region better provide for these services?

As the area's population ages, how do health services need to adapt to meet the needs of families as well as a larger number of older residents?

**Health Professional Shortage Areas by County, 2007**

	Shortage of Primary Care Professionals	Shortage of Dental Professionals
<b>Pocatello Region</b>		
Bannock	Southern part of county; community health centers located in and near Pocatello	Southern part of county; community health centers located in and near Pocatello
Bear Lake	Area near Georgetown; Low-income residents of Montpelier and Paris	No
Bingham	Low income residents	Low-income residents
Caribou	Entire county	Low-income residents
Franklin	Entire county	Low-income residents
<b>Idaho Falls Region</b>		
Bonneville	Eastern portion of county near Swan Valley	No
Clark	Entire county	Entire county
Fremont (ID)	Entire county	Low-income residents
Jefferson	Entire county, including low-income residents	Low-income residents
Madison (ID)	Low-income residents	Low-income residents
<b>Bozeman Region</b>		
Gallatin	Southern third of county near West Yellowstone; Northeastern portion near Three Forks and Manhattan	No
Beaverhead	No	No
Madison	Entire county	Entire county
Park County (MT)	Community health center and two rural health clinics serving the entire county	Community health center and two rural health clinics serving the entire county
<b>Billings Region</b>		
Yellowstone	Two community health centers in Billings	Two community health centers in Billings
Carbon	Eastern half of county near Bridger, Fromberg, and Joliet	Entire county
Park (WY)	Southwestern part of county near Meeteetse	Low-income residents
Stillwater	No	Entire county
Sweetgrass	Entire county	No
<b>Riverton/Lander Region</b>		
Fremont (WY)	Western part of county near Dubois; Southeastern part of county served by Arapahoe Indian Health Center	Low-income residents; Southeastern part of county served by Arapahoe Indian Health Center
Hot Springs	Entire county	Low-income residents
<b>Jackson Region</b>		
Teton (WY)	No	No
Lincoln	Southern part of county near Kemmerer	Low-income residents
Sublette	No	No
Teton (ID)	Entire county, including rural health clinic in Driggs	Low-income residents

Note: Health Professional Shortage Area is a federal designation. Source: U.S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Health Professions.

## Access to medical services difficult in some areas

Availability of health practitioners is not the only way of looking at the adequacy of medical services. Medically underserved areas may also be marked by high infant mortality rates, poverty rates, and population over 65 years of age.

In designating medically underserved areas, the federal government accounts for each of these three variables, plus the ratio of primary medical care physicians per 1,000 population.

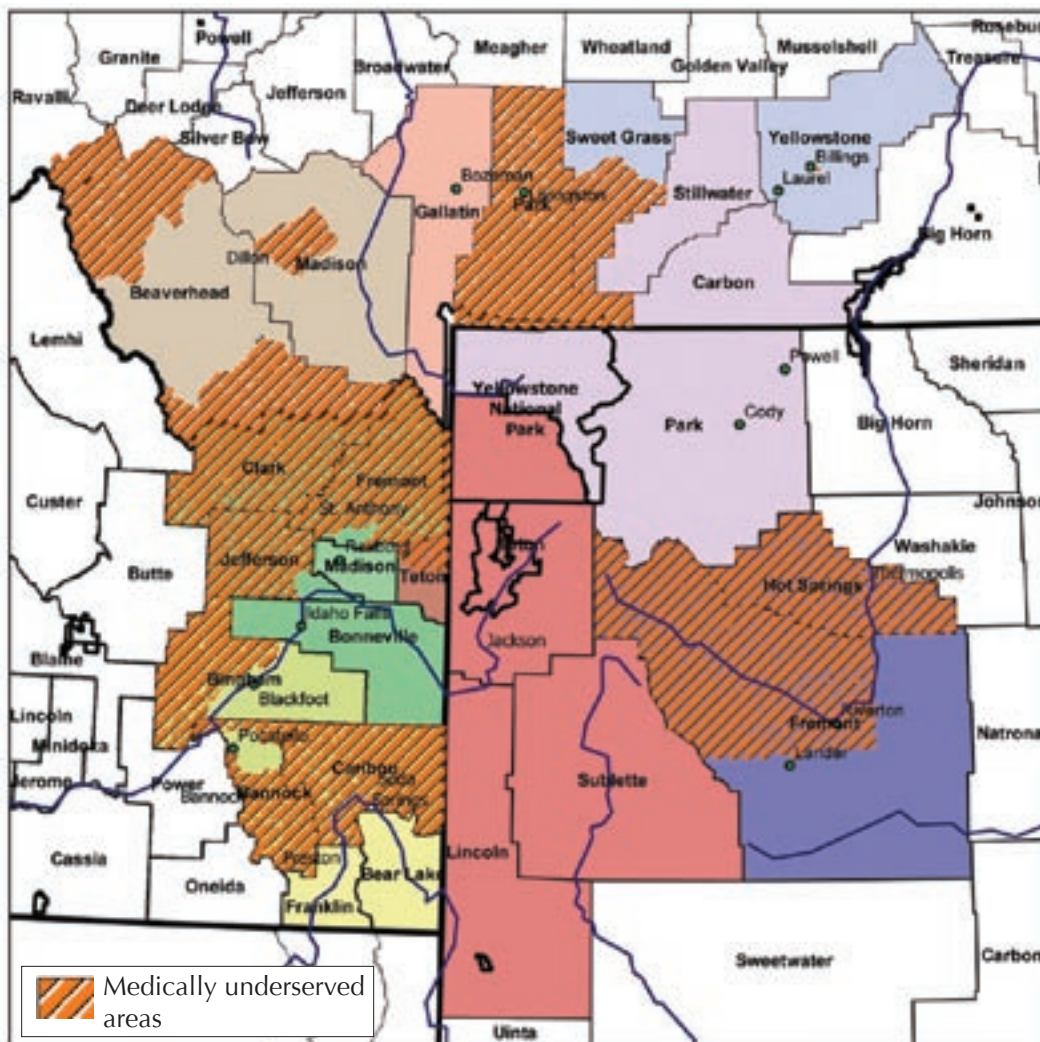
Groups of people, too, may have difficulty accessing medical services because of economic, cultural, or linguistic barriers. These are considered underserved populations.

The map below shows medically underserved areas in the Yellowstone-Teton region. The only designated medically underserved populations are in small parts of Bozeman, Montana.

## Implications and Questions

Access to health care—and, more broadly, community health—depends upon a wide range of social and economic factors. Are the changes afoot in the Yellowstone-Teton region translating into better health and quality of life for residents?

Medically Underserved Areas and Populations, 2007



Note: Medically underserved area and medically underserved population are federal designations. Source: U.S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Health Professionals

## The region's cities are well-connected by air, but not to each other

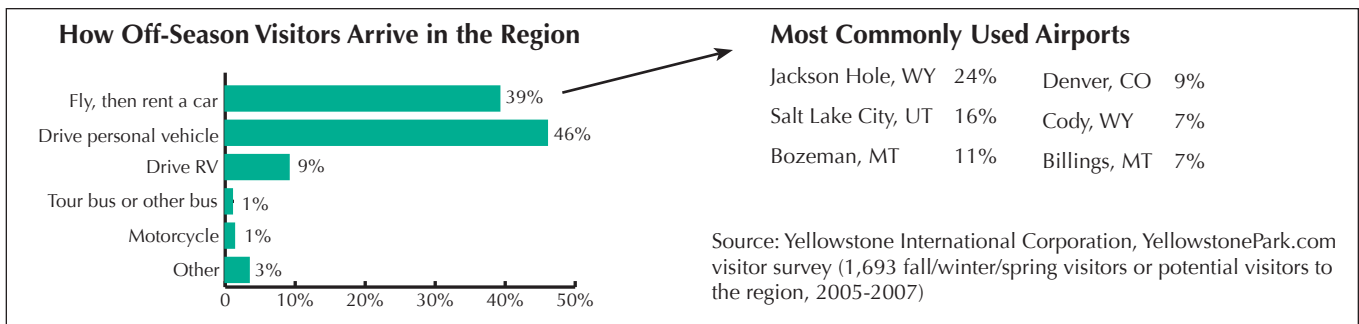
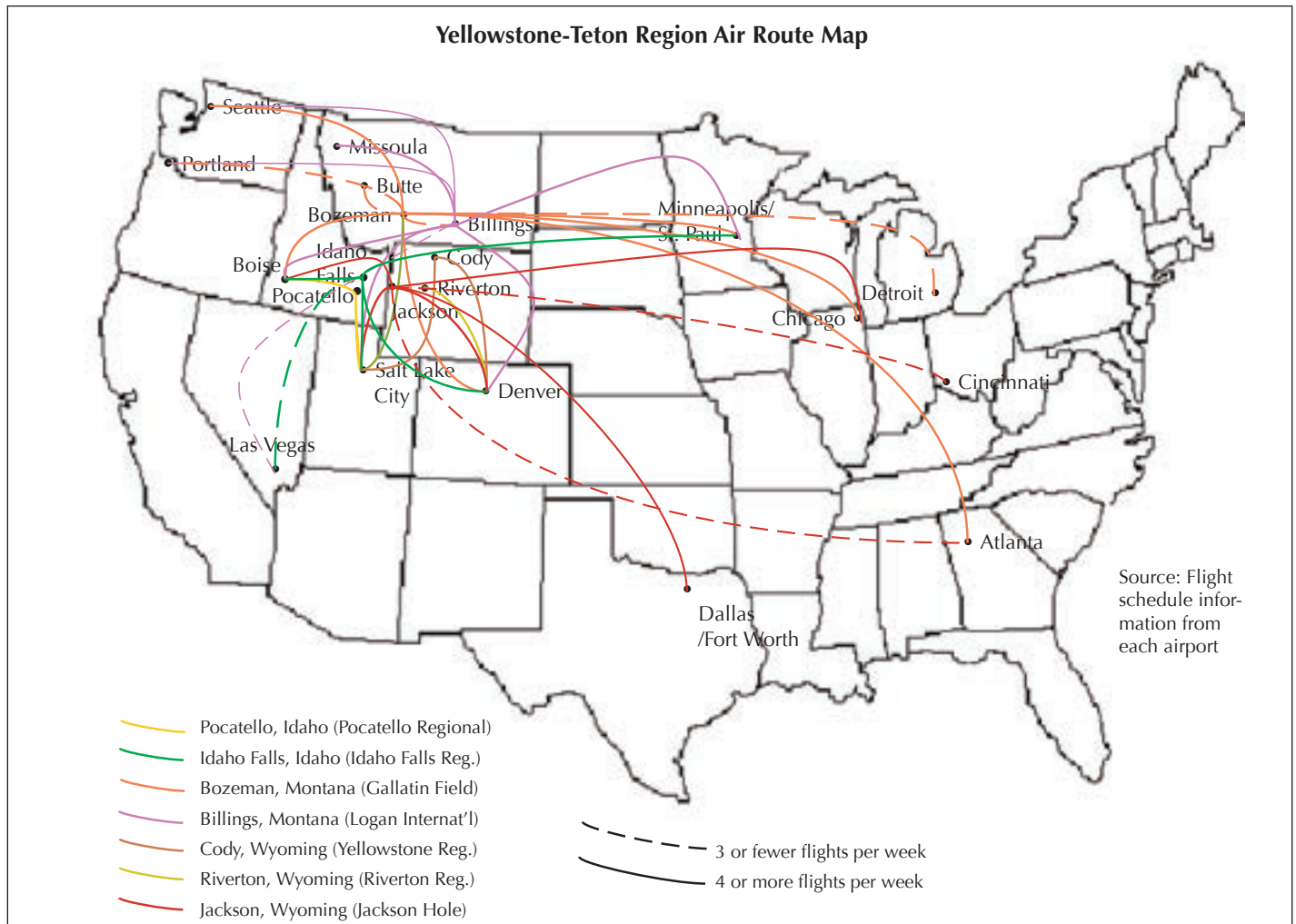
The Yellowstone-Teton region has seven year-round commercial airports, and one (West Yellowstone) that is open for four months during the summer. (See p. 17 for detail on traveler volume.) These airports primarily offer service to western hubs for national and regional airlines.

The airports do not directly link cities in the Yellowstone-Teton region. The time requirements of using commercial

airlines to get around the region rival those of driving, and the cost can be significantly greater.

### Implications and Questions

Would better air connections make doing business or traveling for pleasure within the region more viable? Where might public transportation designed for tourists and workers better link the region's communities and major attractions?



## Private aviation key at some airports, but not widely affordable or accessible for intra-regional travel

Thirty-four public-use airports operate within the Yellowstone-Teton region. Many of these are small, with limited activity, or cater primarily to locally based aircraft.

Some airports are heavily used by private aircraft from outside the local area, or by chartered service. These hotspots for private aviation may serve as transportation hubs for small-craft air service to, from, and within the region.

The table below shows non-local and small-craft commercial use at the airports with the greatest activity in these categories. The “air charter” category includes commuter service, on-demand air service, charters, and sightseeing flights. The aircraft covered are turboprop planes and turbojets with up to 30 seats.

Some “jet card” and fractional ownership services fall into the air charter category. Other such services operate under the general aviation category.

While a small number of charter operations serve the region, on-demand air taxi service is not available. Charter service

tends to be much more expensive than commercial air service or private automobile. This reduces its viability as a common mode of transport for business, government, and personal use.

### Implications and Questions

These data do not reveal the origin or destination of the private craft that use the region’s airports. Thus, the extent to which private aviation is used to travel within the region cannot be gauged.

A new class of “very light jets” is starting to hit the runways. These four- to six-passenger craft will run less than half the price of the next lowest-priced jets. Their operating costs will be comparable to, if not lower than, turboprops that carry a few more passengers but fly at only half the speed.

Are there opportunities for improving travel within the Yellowstone-Teton region? What is the potential market for on-demand air taxi service?

**Hotspots for Private Aviation—Air Charter and Non-Local General Aviation, 2006**

	Av. daily aircraft operations	% transient general aviation	% air charter	Av. daily flights, transient general aviation	Av. daily flights, air charter
Idaho Falls Regional Airport (ID)	131	43%	30%	56	39
Allen H Tigert Airport (Soda Springs, ID)	28	78%	-	22	-
Billings Logan Intntl Airport (MT)	282	30%	37%	85	104
Gallatin Field (Bozeman, MT)	184	37%	17%	68	31
Bridger Municipal Airport (MT)	27	57%	-	15	-
Columbus Airport (MT)	25	53%	3%	13	1
Laurel Municipal Airport (MT)	123	73%	-	90	-
Yellowstone Airport (West Yellowstone, MT)	53	77%	3%	41	2
Three Forks Airport (MT)	32	13%	63%	4	20
Jackson Hole Airport (WY)	99	41%	15%	41	15
Ralph Wenz Field Airport (Pinedale, WY)	26	21%	37%	5	10

Table includes airports with greater than 50 percent transient general aviation activity and averaging  $\geq 13$  non-local general aviation flights daily AND/OR airports with greater than 15 percent air charter activity and averaging  $\geq 10$  air charter flights daily.

General aviation includes operations covered under Part 91 of the Federal Aviation Regulations. Air charter operations are those covered under Part 135. Transient general aviation includes operations by aircraft based at a different airport.

Source: Airnav.com

## Moving beyond the snapshots

As noted in the introduction, this report is comprised of snapshots—ways of looking at the region through different lenses. By themselves, these snapshots do little to suggest how to move forward.

That is where you come in.

Among the common themes that emerged during the community workshops that kicked off this project was this: The Yellowstone-Teton region suffers from a pervasive lack of communication and coordination. One need not look across major divisions such as state lines to encounter strangers. This lack of communication, common vision, and collaboration was identified as a problem *within* communities and *among* even neighboring communities.

We just don't know a lot about each other, which makes it difficult to understand this region and our opportunities for moving forward in concert. This report may provide a seed for strengthening relationships within communities, subregions, and the whole Yellowstone-Teton area.

The importance of these snapshots lies in their interpretation, how they are put into context, and the questions and conversations they prompt.

## Seasonality in Context

The concept of “off-season” applies differently in different places. Overall, seasonality does not appear to be a problem for the region's larger economies, although it poses challenges within certain industries or for particular employers. Growth outside the seasonal parts of the economy is strong in the region as a whole. Still, some places—especially smaller communities—experience seasonal fluctuations as a dramatic impediment to economic vitality.

This variation suggests that place-based strategies hold the most promise for progress on specific problems related to chronic seasonality.

Yet, trace the roots of a problem associated with seasonality (such as employee retention, under-employment, and housing availability), and you are likely to find connections to related issues in the larger economy.

## Work Together

These connections suggest that collaborative action, urban-rural partnerships, and other subregional or regional approaches could have value.

Pursuing economic development and solutions to seasonal challenges town-by-town or county-by-county ignores sub-

regional and regional connections. Cultivating relationships among neighboring communities expands the possibility of influencing local economic conditions.

## Think Strategically

Change is a given for the Yellowstone-Teton region. Dominant forces that will continue to direct change include:

- Continued population growth, led by newcomers moving to the region;
- A steadily aging population;
- Ongoing economic restructuring, with growth concentrated in service industries such as health care, accommodation and food services, and professional and technical services; and
- An increasing share of labor income from non-labor sources.

In this climate, positioning, timing, and strategic thinking are critical. Strategies for economic improvement must reflect where the economy is going, not where it has been. Seeing the bigger picture may also spark ideas that address multiple challenges simultaneously. For example, many people of retirement age still want to or need to work. At the same time, tightening labor markets will leave jobs unfilled. What types of adjustments (e.g., more flexible, part-time jobs) would help older adults remain in the labor force longer?

## Invest in Assets

In this region, there is plenty of experience investing in the development of natural resources. Our communities are less practiced at investing in a “human resource-based” economy. Well-designed, well-funded, adaptive systems for lifelong education and workforce development are essential for economic prosperity. Access to education must be dispersed outside of urban centers.

Investments in environmental quality, recreational facilities, regional transportation, health care, and educational and cultural assets pay off in quality of life for residents and long-term vitality for the region.

This project and report point out some compelling ways of understanding Yellowstone-Teton as an economic and social region. Leveraging that understanding can help the region's communities position themselves for future prosperity.

## List of Technical Appendices

These technical appendices are available for download from [http://www.yellowstonebusiness.org/our\\_programs/socio-economic\\_research/](http://www.yellowstonebusiness.org/our_programs/socio-economic_research/). Or, follow the links to “Socioeconomic Research” from the “Our Programs” tab on the Yellowstone Business Partnership homepage at <http://www.yellowstonebusiness.org>.

### Appendix A

#### Growth and Change in the Yellowstone Region

Prepared by Dr. Larry Swanson, O'Connor Center for the Rocky Mountain West, University of Montana. March 2007.

Analyzes key demographic and economic trends in the Yellowstone-Teton region and its subregions, and places them in the context of the Rocky Mountain West. Analysis includes: Urban/rural characteristics, population growth, shifting age composition, housing projections, personal income growth and composition, indicators of economic well-being, employment growth and change, trends in key economic sectors, residential adjustments in labor earnings, seasonal employment, and seasonal traffic flows.

### Appendix B

#### Subregional Profiles

Brief profiles of each of the six subregions and constituent counties, including educational attainment, median age, household income, seasonal housing, population change, median rent and homeowner costs, rental housing affordability, poverty rates, health insurance coverage, per-capita income, employment growth, and change in size of agricultural holdings.

### Appendix C

#### Summary of Community Workshops

The “Turning On the Off-Season” project began with a series of six community workshops around the region. These meetings were attended by a variety of community members from businesses and business groups; educational, cultural, and community organizations; government agencies and offices; and economic development groups. This document summarizes key themes from these workshops.

### Appendix D

#### Selected Results from YellowstonePark.com Survey of Visitors

Prepared by Yellowstone International Corporation, Lander, Wyoming. March 2007.

Summarizes market research from nearly 1,700 fall/winter/spring visitors or potential visitors to the Yellowstone-Teton area.

### Appendix E

#### Traffic Flow Data for Selected Sites

Data from automated traffic recorders for 53 sites around the region. Average daily traffic is charted for the early 1990s and early 2000s for each site, depending upon data availability. Three additional charts show changes in traffic flows over time for Idaho, Montana, and Wyoming highways in the region.

### Appendix F

#### National Park Visitor Data

Data from 1992 through 2006 reflecting monthly visitation by entrance gate at Yellowstone and Grand Teton national parks. Charts show the average monthly visitation for the early 1990s and early 2000s for each gate.

### Appendix G

#### Natural Assets and Opportunities

Maps and a list of information resources.

### Appendix H

#### Recreational Assets and Opportunities

List of facilities and information resources.

### Appendix I

#### Educational and Cultural Assets and Opportunities

List of institutions and organizations.

### Appendix J

#### Health Care Assets and Opportunities

List of major facilities and information resources.

### Appendix K

#### Transportation Assets and Opportunities

List of information resources.

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<b>Research Institute/USDA State Forestry</b>	Boise, Idaho
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The counties and communities in the Yellowstone-Teton region are commonly influenced by the presence of high-quality natural areas, a core of public lands, large wildlife populations, and plentiful opportunities for outdoor recreation. Along with these benefits, Yellowstone-Teton's communities also hold some concerns in common. These include seasonal economic fluctuations, which challenge many businesses, communities, and residents.

Yellowstone Business Partnership's "Turning On the Off-Season" project aims to help business and community leaders grasp the nature and implications of regional economic and demographic trends—particularly in the off-season months. It also aims to build understanding of the region across the jurisdictional boundaries and vast geography that tend to isolate its communities.

This report offers a series of snapshots from the larger analysis conducted during the first phase of the "Turning On the Off-Season" project. It focuses on characteristics and indicators relevant to understanding how this region operates, and its assets and opportunities for building more vibrant, year-round economies.

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