




**YELLOWSTONE BUSINESS  
PARTNERSHIP**

**Seasonality Summit  
Pocatello Subregion Report**

October 7-8, 2008  
Cody, Wyoming

**Topics**



- 1. Project Purpose & Approach**
- 2. Work Completed to Date**
- 3. What We Have Learned**
- 4. So What?**

# 1. Project Purpose and Approach

- **Overcome Seasonality**
- **Gain Sustainability**
- **8-Step Recreation & Tourism Development Process**



## Project Purpose

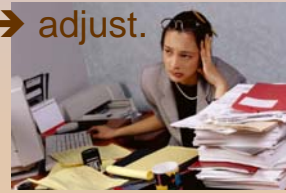
- “Address challenges to overcoming seasonality.”
- “Identify opportunities to move toward a year-round economy and environmental sustainability.”
- **OUTCOME:** Potential opportunities for recreation enterprise development in Southeast Idaho (6 counties)



# Approach

8-Step Process for Recreation & Tourism Devt :

- Assess existing products and services.
- Conduct market analysis.
- Goals, objectives, actions.
- Implement product development.
- Communicate with the customer.
- Manage the visitor *experience*.
- Continue the customer relationship.
- Measure results vs. objectives → adjust.



## 2. Work Completed to Date

**Trends Analysis (June-August)**

**Web-based Survey (August)**

**Site Visit and Assessment (September)**

## 2. Work (cont'd)

- **Data Gathering & Analysis**
  - Socio-economic (population, employment, etc.)
  - Tourism (lodging sales, seasonality, visitation)
  - Assets (inventory, assessment, gaps)
- **Online Survey**
  - 149 participants (5,700+ employees)
  - 59% businesses, 38% serve travelers (1,500 empl.)
  - 1,000+ comments(!)
  - Report avail. online (120 pgs, results for region/county)
- **Site Visits**
  - Interviews, public workshops, a dozen towns



## 3. What We Have Learned

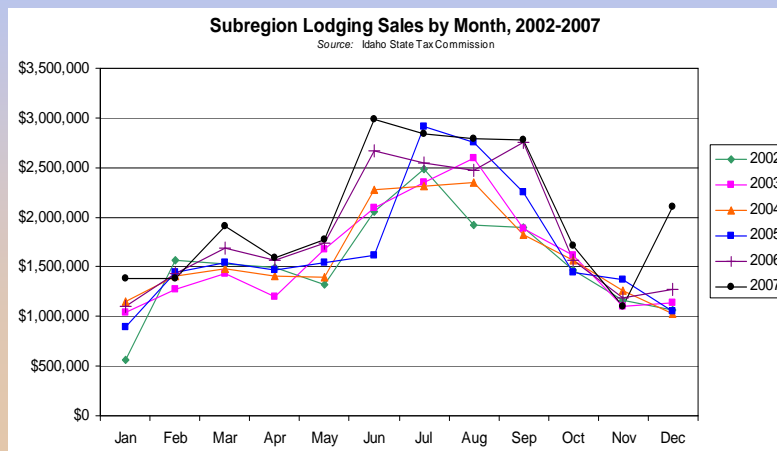
**Trends**  
**Assets**  
**Challenges**  
**Markets**

## Trends: Socio-Economic

- Population growth mixed:
  - 2000-2007: +4% (vs. 16% state)
  - Franklin Co +8%, Bannock Co +6%
  - Bear Lake, Caribou, Oneida lost population
- Employment rising:
  - Energy, medical, education sectors
  - Leisure & hospitality, retail growing
  - Bannock County: +1,800 jobs 2006-2009 (Hoku Materials, Premier Technologies, etc.)
  - Recreation/Hospitality/Retail: 8,800+ jobs

## Trends: Tourism

- Lodging sales growing (+7% 2008 vs. 2007)
- Visitors traveling to/from Yellowstone critical
- \$12+ million in vacant capacity (off-season)



## Trends: Rec'n & Tourism

- Bannock County: 82% of regional lodging sales, 70% of regional inventory
  - 2 new hotels in 2007
- “Off-Season” = Nov. to March (survey)
  - International & group travel increasing (boomers)
  - September visitation higher than August at key attractions
  - Services close after Labor Day
- Marketing efforts fragmented



## Existing Markets

- Regional (S. Idaho, Wasatch Front)
- YNP/GTNP visitors
- Niche (snowmobilers, sportsmen, groups, golfers, wildlife viewers, etc.)





# Assets

## Inventory

### Key Clusters (Off-Season)

# Inventory Summary

Pocatello Subregion Rec'n & Tourism Asset Summary	Season				Location						Asset Type				Business Type				Amenity									
	Winter	Spring	Summer	Fall	Off-Peak Oppy	Bannock	Bear Lake	Bingham	Caribou	Franklin	Oneida	Recreation & Sports	Natural Attractions	Cultural/Historical	Fair & Festivals	Outfitter	Retail	Lodging	Transportation	Food & Beverage	Other	Family/Kid Friendly	Eco-Friendly	Disabled Friendly	Meeting Facility	Technology friendly		
<b>ACCOMMODATIONS</b>																												
Hotel, Lodges, and B & Bs						78	15	5	10	6	3								117								13	
RV Parks and Campgrounds						22	17	21	11	1	1								44									
<b>Total Accommodation Properties</b>						<b>100</b>	<b>32</b>	<b>7</b>	<b>11</b>	<b>7</b>	<b>4</b>								<b>161</b>	<b>0</b>	<b>0</b>	<b>0</b>					<b>13</b>	
Lodging Units						1,644	238	162	209	27	27																	
RV/Camping Units						886	381	55	208	53	40																	
<b>Total Accommodation Units</b>						<b>2,530</b>	<b>619</b>	<b>217</b>	<b>417</b>	<b>80</b>	<b>67</b>																	
<b>TOURIST SERVICES</b>																												
Visitor Information Center						1	3	0	1	0	1												6					
Outfitters, licensed	5	15	15	15								15						15										
Restaurants						98	3	37	14	2	4										158							
Airports						1					1																	
						<b>100</b>	<b>6</b>	<b>37</b>	<b>15</b>	<b>2</b>	<b>6</b>	<b>15</b>						<b>15</b>	<b>0</b>	<b>158</b>	<b>6</b>	<b>15</b>				<b>0</b>		
<b>ATTRACTIONS</b>																												
Binding Trails						3	2	2	3	1	2	13														13	19	
Golf Courses		9	10	10			3	2	2	2	1	0	10														10	
Historic Places & Districts	4	4	4	4	4			2		1	1							4									4	
Museums						6	4	2	2	1	1							16									16	
Hot Springs						7	1	0	4	6	0	18	18														18	
Rivers, Lakes and Reservoirs	16	16	16			1	3	3	2	3	4	16	16														16	
Misc. (Monuments, Parks, etc.)						5	3	2	5	3	0	18															18	
Overlooks/Observation Points						1	1	0	3	2	0	7						7									7	
Trail Systems	15	15	1	0		6	3	0	4	2	1	16	16														16	
Public lands - State & Federal	12	12	12	12		2	4	1	4	1	0	12	12														12	
Scenic Drives	4	4	4			0	1	1	0	0	2	4															4	
	<b>31</b>	<b>60</b>	<b>47</b>	<b>46</b>		<b>34</b>	<b>26</b>	<b>13</b>	<b>30</b>	<b>21</b>	<b>10</b>	<b>114</b>	<b>62</b>	<b>27</b>	<b>0</b>											<b>134</b>	<b>13</b>	<b>1</b>
<b>EVENTS</b>																												
Bannock County Events	2	6	14																								23	
Bear Lake County Events	2	1	4				7						4														7	
Bingham County Events			4	1				5					1	1	3												5	
Caribou County Events	1	1	3						5				2	1	3												5	
Franklin County Events	1	2								3			1	0	3												3	
Oneida County Events	1	5										7	3	2	3												7	
	<b>7</b>	<b>9</b>	<b>32</b>	<b>1</b>		<b>23</b>	<b>7</b>	<b>5</b>	<b>5</b>	<b>3</b>	<b>7</b>	<b>23</b>	<b>0</b>	<b>15</b>	<b>27</b>											<b>50</b>		
<b>EMERGENCY SERVICES</b>																												
Medical Clinic/Hospitals						18	2	13	3	2	2																40	
Auto Repair, Tow, Tire service						43	2	17	6	8	7																83	
RV Service						3		1																			4	
						<b>64</b>	<b>4</b>	<b>31</b>	<b>9</b>	<b>10</b>	<b>9</b>																	

## Key Clusters (Off-Season)

- Corporate and university meetings, conferences: energy, health sciences, research, etc.
  - Link to environmental sustainability, economic development efforts



## Clusters: Hot Springs

- 18 hot springs (natural, developed, spas, resorts, camping)



## Clusters: Outdoor Recreation

- Public lands: fishing, hunting, hiking, biking, wildlife viewing, birding, geocaching



## Clusters: Winter Recreation

- Snowmobiling...

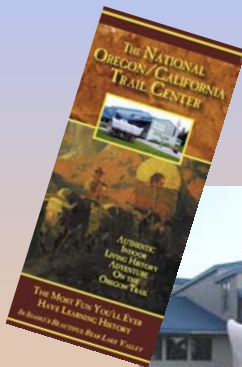


... skiing, ice fishing, tubing, dog sledding



## Clusters: History & Culture

- Oregon/CA Trail, Shoshone-Bannock, Mormon, Hispanic



## Clusters: History & Culture

- Scenic/historic byways, festivals, historic sites, museums, artisans, performing arts



## Clusters: Natural Attractions

- "Rocks"...



...lava, and water → linked to Yellowstone ecosystem



## Clusters: Sports

- Events and competitions: rodeo, bike, motocross, NCAA, youth





## Challenges

Product  
Marketing  
Resources

## Challenges: Product

- Attraction closures after Labor Day (survey: would stay open longer)
- Adequate accommodations & dining (outside Bannock County)
- Customer service! (training)
- Transportation and access
- Lack of visitor info “system”
- “Growth 101” policy issues
- Rural downtown decline



## Challenges: Marketing

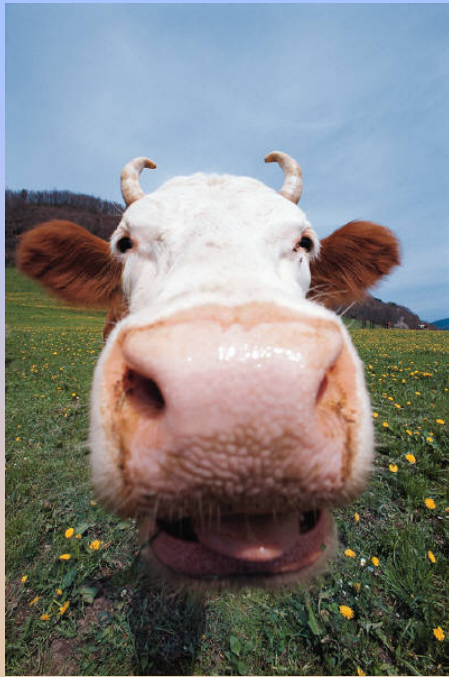
- Pass-thru and “tourist season” mentality
- Lack of “market intelligence” (research, visitor data)
- Lack of strategic off-season marketing
- Need for training (web 2.0, analytics, effective relationship marketing, etc.)
- CVB staffing, accreditation
- Events at wrong times (peak season)
- “Ads, shows, printing, postage...”



## Challenges: Resources

- Organizational capacity (i.e., funding and training for professional staff, planning)
- Volunteer burnout
- Workforce and housing issues (Oneida, Caribou)
- Facility/attraction O&M costs, funding
- Venture/startup capital, business assistance
- Geopolitical barriers (“means vs. ends”)





## So What?

**Opportunities**  
**Potential Markets**  
**Steps Needed**  
**Organization**

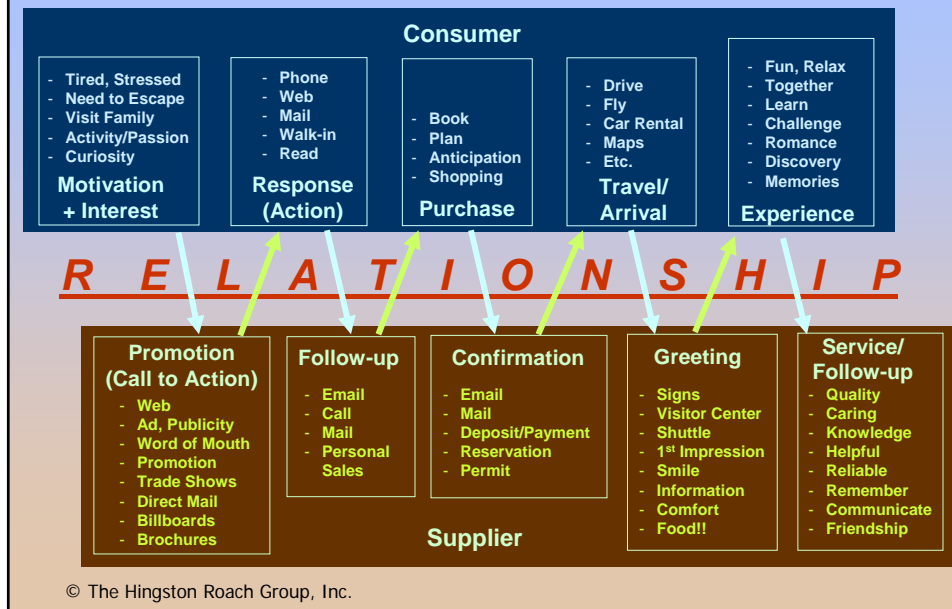
## Opportunities → Markets

- Hot springs, spas → couples, girlfriend getaways
- Conferences → ISU faculty, corporations
- Outdoor recreation → groups, clubs, guided guests
- History, culture, byways, wildlife → edu- and geo-tourism, voluntourism, groups
- Natural attractions → scientists, educational groups
- Sports → teams, individual compet'rs



IN GENERAL: Boomers, couples, international, home schoolers, business travelers, associations, church groups

## “The Tourism Transaction”



## Potential Investment Opp'tys

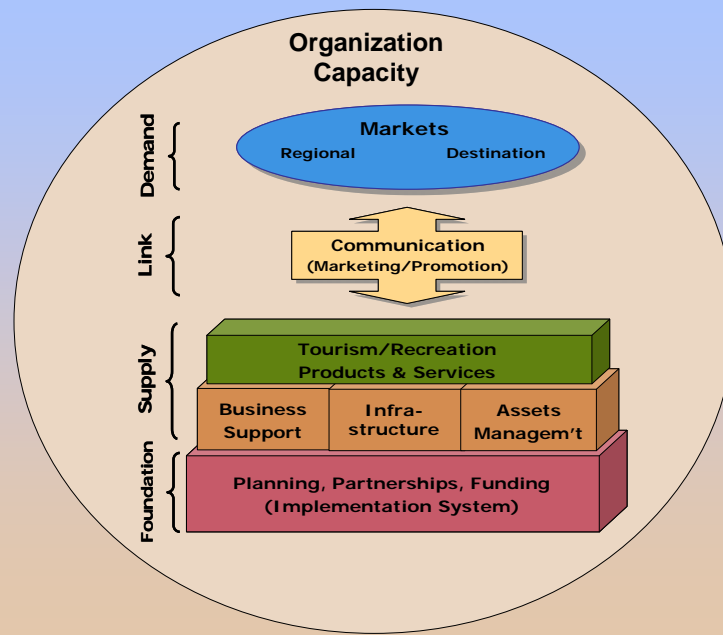
- Brand hotels in Caribou/Oneida Co.; near ISU?
  - Triad Resorts (Montpelier): 'Eco Stays'
- RV parks
- Hot springs enhancements: spa amenities/services
- Guided recreation/interpretive activities (snowmobile/ATV tours, fishing, hunting, wildlife viewing, photography, biking, Fall foliage)
- Recreation equipment rentals
- Transportation systems (transit, SE Idaho regional airport near Blackfoot?)
- Sports events and competitions

## Steps Needed

- A. Regional consensus re. target markets
- B. Specific objectives → actions
- C. Coordinated strategy (“ready-aim-fire”)
- D. Marketing tactics, tracking/reporting
- E. Implementation: product upgrades, strategic recruitment, manage *experience*
- F. Collect/report results
- G. Strategic decisions about adjustments



## Tourism “Econo-system”





## Key Issues

- Off-season opportunities abound!
- Fill vacant capacity first – and incrementally
- Success requires professional regional team (fragmented semi-volunteer efforts ineffective, particularly in rural areas with few resources)
- Investments in regional planning, training, coordination will increase ROI



## Questions??

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