

Turning On the Off-Season

Technical Appendix I Education and Culture Assets and Opportunities

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Overview of Market for Historic and Cultural Tourism

National Trends that Reflect on Regional Opportunities

A 2003 study of historic and cultural traveler preferences commissioned by *Smithsonian* magazine and conducted by the Travel Industry Association revealed several trends relevant to opportunities in the Yellowstone-Teton region.

- * Six of ten adults who traveled in the past year included at least one cultural, arts, historic, or heritage activity while on the trip.
- Visiting a designated historic place or museum was the most popular activity (66%).
- Four in ten historic/cultural trips are taken by Baby Boomer householed (age 35-54) and three in ten are taken by mature householde (age 55 and older).*
- One-third of historic/cultural travelers have an annual household income of \$75,000 or more. The median annual household income of historic/cultural travelers is \$55,600.
- Six in ten historic/cultural trips are generated by households with a college degree or higher. Most (69%) historic/cultural travelers agreed that trips where they can learn something new are more memorable to them.
- On average, historic/cultural travel parties spend more (\$623) per trip compared to the average U.S. trip (\$457).

- Nearly all (90%) historic/cultural trips involve an overnight stay. Trips by private auto account for seven in ten trips.
- Four in ten historic/cultural travelers said they added extra time to their trip because of historic, cultural, arts, or heritage activity or event. Of those travelers who added extra time, 44 percent added part of one day and 25 percent added one extra night.
- Shopping (44%), visiting national and state parks (20%), and engaging in outdoor activities (17%) are among the most popular activities for visitors on historic/cultural trips.

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- * Note: These are also the age categories that are growing most rapidly in most parts of the Yellowstone-Teton region, suggesting the potential for a large and growing market for these activities among the region's residents.

Source: Travel Industry Association of America. 2003. *The Historic/Cultural Traveler, 2003 Edition*. Available for purchase at http://www.tia.org/researchpubs/ra_jul3003.html. As summarized in Dean Runyan Associates. 2004. *Yellowstone Historic Center Market Assessment and Economic Impacts* (prepared for the Yellowstone Historic Center, West Yellowstone, Montana).

Seasonal Attendance at Museums and Learning Centers in the Region

While gate proceeds are rarely the sole source of revenue for a museum or learning center, seasonal peaks and dips in attendance are one indicator of how fully utilized these assets are year-round.

As the analysis on page 24 of the *Turning On the Off-Season* report suggests, visitors from nearby (the immediate, local area or the larger four-state region) are more important during the off-seasons than they are during summer. A regional population that is expanding especially among older adults may offer a broader audience for the quieter seasons.

Museums and learning centers differ from each other in important ways—including content focus, appeal to families, and location. One museum (the Museum of Idaho) has discovered significant seasonal differences among its seasonal visitors which are helping to guide museum operation including exhibit selection and marketing.

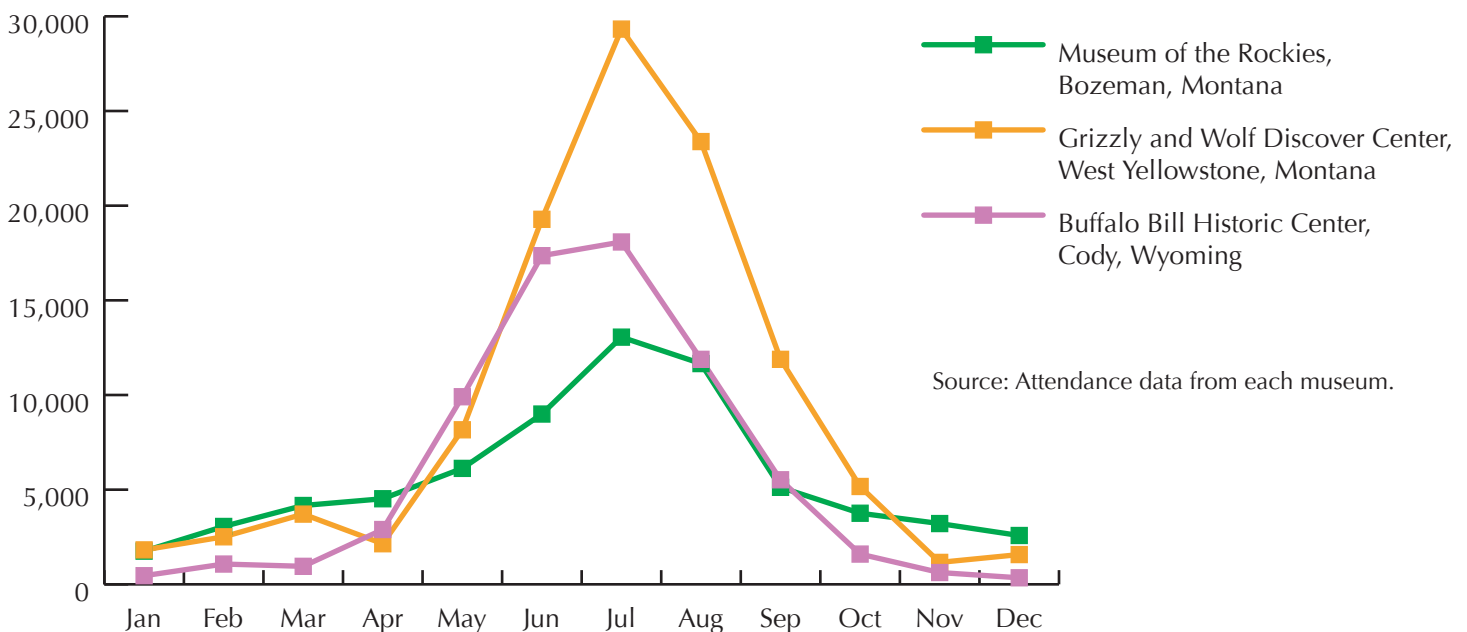
At the Grizzly and Wolf Discovery Center, however, marketing focuses primarily on visitors already planning a trip to

Yellowstone. Marketing efforts do not seem to assist much with increasing shoulder and winter season visitation. Winter visitors are primarily in town to snowmobile and don't tend to be as interested in captive wildlife facilities as visitors in other seasons (although they do spend more money, per person, in the gift shop).

The Grizzly and Wolf Discovery Center is highly family-oriented. Its shoulder-season marketing attempts have revealed a conflict with school activities that kept people closer to home during the school year.

With the growth of its educational programs, the Center hosts increasing numbers of school groups each spring. Discounted school group rates and a teacher's packet of ideas for teachers for incorporating a small curriculum about bears and wolves that ends with a field trip to the Center, are the focal points of this educational program.

2005 Attendance by Month at Three Major Museums and Learning Centers



Educational and Wildlife Festivals

Generating Economic Activity through Festivals

During community workshops held during the development of the Yellowstone National Park Gateway Communities 2005 Economic Strategy Report (Bozeman, Montana: Boot-Leg Enterprise), participants identified a variety of types of festivals as among the best possibilities for developing more economic activity. Ideas varied by community, and included:

- Sasquatch festival;
- Spring festival (coinciding with the opening of the Beartooth Highway);
- Music festivals;
- Grizzly festival;
- Harley rodeo and festival;
- Winter ice sculpture festival;
- World culture festival;
- Extreme sports festival;
- Film festival; and
- Arts festival.

Wildlife Festivals

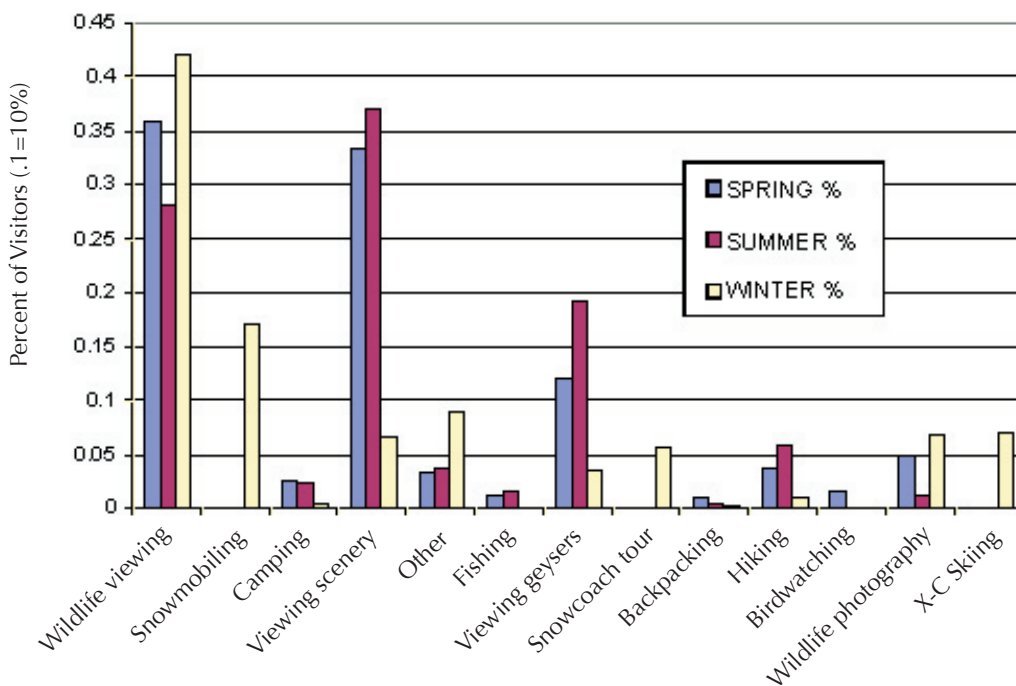
In 2001, 43 percent of visitors to Montana’s “Yellowstone Country” tourism region watched wildlife, while 11 percent attended special events and festivals (Institute for Tourism and Recreation Research, University of Montana).

One study estimated that, in six counties close to Yellowstone park, nonresident wildlife watchers spent \$83 million in 2004 alone.

The figure below shows reported levels of participation in activities that were reported by Yellowstone National Park visitors as their “primary activity” during their 2005 visit. As has been reported in other visitor surveys, wildlife viewing is among the most important motives for visiting the park. This general result is also consistent across the seasons of visitation, but, in the spring and winter seasons, wildlife viewing is relatively more important than it is during summer. This suggests that wildlife viewing is also relatively more important to the local economy in the shoulder seasons when local communities most need the business.

Model festivals may be easily found through Internet searches. Many are local events and do not have dedicated websites.

Primary Activities of Yellowstone National Park Visitors



Source: Neher, C. and J. Duffield. 2005. Yellowstone Wildlife and the Regional Economy: Review of Economic Study Results and Analysis. Prepared for Yellowstone Park Foundation and National Parks Conservation Association. (Download at http://www.npca.org/northernrockies/gateways_yellowstone/)

However, it is not difficult to locate festival organizers as the basis for further research. Some states, such as Alaska, compile listings of wildlife festivals (<http://www.wildlife.alaska.gov/index.cfm?adfg=viewing.festivals>).

Festivals often have an educational component, and there may be opportunities for developing festivals alongside academic conferences or conservation workshops.

Wildlife festivals are often associated with seasonal events such as migrations, when animals tend to be concentrated for easier viewing. The pronghorn migration in the southern Yellowstone-Teton region is an example. Trumpeter swans may be a good focal point for festivals in the eastern part of the region, where concentrations of the birds can be found on the Henry's Fork and at Red Rocks National Wildlife Refuge. Seasonal migrations of sandhill cranes and waterfowl, as well as concentrations of game species such as elk, may offer additional opportunities.

Cultural and Educational Facilities

Listing of facilities is based on readily available Internet information and may not be comprehensive. URLs current as of April 2007. Listing does not include formal education institutions.

Pocatello Region

Pocatello

Idaho Museum of Natural History (<http://imnh.isu.edu/>)

Transition and Minds Eye Galleries, Idaho State University (<http://www.isu.edu/stunion/gallery/index.shtml>)

Pocatello Art Center Gallery and School—a community center for the visual arts (<http://www.pocatelloartctr.org/>)

Bannock County Historical Museum

Other communities

Bingham County Historical Museum, Blackfoot

Idaho Potato Expo, Blackfoot (<http://www.potatoexpo.com/>)

National Oregon/California Trail Center, Montpelier (<http://www.oregontrailcenter.org/>)

Shoshone Bannock Tribal Museum, Fort Hall

South Bannock County Historical Museum, Lava Hot Springs

Blackfoot Community Players, Blackfoot (<http://www.nuart-theatre.org/>)

Idaho Falls Region

Idaho Falls

Eagle Rock Art Museum and Education Center (<http://www.eaglerockartmuseum.org/>)

Eagle Rock Art Guild

Museum of Idaho (<http://www.museumofidaho.org/>)

Idaho Falls Arts Council—Willard Arts Center and Colonial Theater (<http://www.idahofallsarts.org/>)

Collectors Corner Museum

Actor's Repertory Theatre of Idaho

Idaho Falls Opera Theatre (<http://www.idahofallsoperatheatre.org/>)

Idaho Falls Youth Art Center (<http://www.ifyac.org/>)

Idaho Falls Community Players

Idaho Falls Symphony Society (<http://www.idahofallssymphony.com/>)

Other communities

Jefferson County Historical Museum—Farnsworth TV and Pioneer Museum, Rigby (<http://www.blacksmithinn.com/museum.html>)

Hess Heritage Museum, Ashton

Legacy Flight Museum, Rexburg (<http://www.legacyflight-museum.com/>)

Teton Flood Museum, Rexburg

Upper Valley Arts Council, Rexburg

Centerstage Performing Arts Series—BYU Idaho, Rexburg (<http://www.byui.edu/centerstage/>)

Festival Theatre, Rexburg

Roxy Theatre, St. Anthony (<http://www.dramasource.com/roxy/>)

Idaho Migrant Council (<http://www.idahomigrantcouncil.org/>)

Bozeman Region

Bozeman

Museum of the Rockies (<http://www.montana.edu/www-mor/>)

ASMSU Exit Gallery, Montana State University

Beall Park Art Center

Emerson Cultural Center

Helen E. Copeland Gallery School of Art

American Computer Museum (<http://www.compustory.com/>)

Bozeman Symphony (<http://www.bozemansymphony.org/>)

Equinox Theatre Company (<http://www.equinoxtheatre.com/>)

Other communities

Grizzly and Wolf Discovery Center, West Yellowstone (<http://www.grizzlydiscoveryctr.org/>)

Beaverhead County Museum, Dillon

Western Montana College Gallery and Museum, Dillon

Park County Museum, Livingston

Lincoln School Artist Center, Livingston

Livingston Center for Art and Culture, Livingston

Livingston Depot Center, Livingston

Crazy Mountain Productions, Livingston

Headwaters Heritage Museum, Three Forks

Billings Region

Billings

Moss Mansion Museum (<http://www.mossmansion.com/>)

Yellowstone Art Museum (<http://yellowstone.artmuseum.org/>)

Yellowstone County Museum

Yellowstone Western Heritage Center (<http://www.ywhc.org/>)

Northcutt Steele Gallery, Montan State University-Billings

Alberta Bair Theater for the Performing Arts (<http://www.albertabairtheater.org/>)

Billings Symphony (<http://www.billingsymphony.org/>)

Other communities

Buffalo Bill Historical Center—Buffalo Bill Museum, Whitney Gallery of Western Art, Plains Indian Museum, Cody Firearms Museum, Draper Museum of Natural History (<http://www.bbhc.org>)

Old Trail Town Museum of the Old West, Cody (<http://www.nezperce.com/trltown.html>)

Park County Historical Society, Cody

Meeteetse Bank Museum, Meeteetse (<http://wyshs.org/mus-meeteetsebank.htm>)

Crazy Mountain Museum, Big Timber

Carbon County Arts Guild and Depot Gallery, Red Lodge (<http://www.carboncountydepotgallery.org/>)

Riverton Region

Central Wyoming College Arts Center, Riverton (<http://www.cwc.edu/Community-and-Friends/Arts-Center.htm>)

Riverton Museum—local history (<http://www.wyoming.com/~rivmus/default.shl>)

Wind River Heritage Center, Riverton (<http://www.windrivercountry.com/riverton/windriverheritagecenter.html>)

Wind River Historical Center, Dubois

National Big Horn Sheep Center, Dubois (<http://www.bighorn.org/>)

Shoshone Tribal Cultural Center, Fort Washakie (<http://wyshs.org/mus-shoshone.htm>)

Arapahoe Cultural Museum, Ethete

South Pass City State Historic Site (<http://wyoparks.state.wy.us/spcslide.htm>)

Fremont County Pioneer Museum, Lander (<http://www.rootsweb.com/~wygenweb/photos/lander/pioneer.htm>)

Dancing Bear Folk Center, Thermopolis (<http://server1.dancingbear.org/Visit%20Us.html>)

Hot Springs County Museum and Cultural Center (<http://server1.dancingbear.org/Visit%20Us.html>)

Legend Rock Petroglyphs State Historic Site (<http://thermopolis.com/Attractions/Petroglyphs.htm>)

Old West Wax Museum, Thermopolis (<http://server1.westwaxmuseum.com/>)

Jackson Region

Jackson

National Museum of Wildlife Art (http://www.wildlifeart.org/Frame_HomePage.cfm)

Jackson Hole Historical Society and Museum (<http://www.jacksonholehistory.org/>)

Teton County Historical Center

Jackson Center for the Arts (<http://www.jhcenterforthearts.org/>)

Grand Teton Music Festival (<http://www.gtmf.org/>)

Off Square Theatre Company (<http://offsquare.org/>)

Other communities

PROPOSED Natural History Museum of Western Wyoming, Alpine (<http://www.adamandeveolution.com/>)

Fossil Butte National Monument, Kemmerer (<http://www.nps.gov/archive/fobu/expanded/index.htm>)

Fossil Country Frontier Museum, Kemmerer (<http://www.hamsfork.net/~museum/>)

J.C. Penney Homestead and Historical Foundation, Kemmerer (<http://www.hamsfork.net/~museum/>)

Lincoln County Museum, Afton

Green River Valley Museum, Big Piney (<http://www.grvm.com/>)

Museum of the Mountain Man, Pinedale (<http://www.museumofthemountainman.com/>)

Teton Valley Museum, Driggs

Teton Arts Council, Driggs (<http://www.tetonartscouncil.com/>)

Four-Year Schools

Idaho State University (Pocatello)

<http://www.isu.edu/>

ISU provides undergraduate and graduate educational services in Pocatello, at ISU centers in Idaho Falls, Twin Falls and Boise; and to outlying communities via state-of-the-art compressed and IP audio/video video technology. Continuing education offered, as well.

BYU-Idaho (Rexburg)

<http://www.byui.edu/>

Offers online courses.

Montana State University (Bozeman)

<http://www.montana.edu/>

Distance degree and certificate programs, and continuing education offered through the main campus.

Montana State University-Billings

<http://www.msubillings.edu/>

Offers outreach/continuing education and online courses.

Rocky Mountain College (Billings)

<http://www.rocky.edu/>

Two-Year Schools

Two-year community, technical, and technology colleges are centers for workforce development in every part of the region.

MSU-B College of Technology (Billings)

<http://www.cot.msubillings.edu/>

Offers collaborative programming with the Billings school district Career Center, serving three high schools. Works with partners to provide outreach in the community and larger region.

Central Wyoming College (Riverton)

<http://www.cwc.edu/>

Off-campus sites in Jackson, Lander, Thermopolis, and Dubois.

Northwest College (Powell)

<http://www.northwestcollege.edu/>

Off-campus center in Cody.

Eastern Idaho Technical College (Idaho Falls)

<http://www.eitc.edu/>

Offers on-line courses. Outreach programs offered in several communities focusing on GED preparation and English as a Second Language.

ISU College of Technology (Pocatello)

<http://www.isu.edu/ctech/>

Outreach centers in American Falls, Blackfoot, Malad, Montpelier, Preston, and Soda Springs.