

Tourism

Goal Rationale and Background:

Tourism is Idaho’s fifth largest employer, accounting for 47,203 jobs, or 7% of all jobs, directly in 2004. The industry accounts for \$2.1 billion in gross state product, and with indirect and induced impacts accounts for 5% of gross state product and 11% of all jobs, according to a study by Global Insight funded by the Idaho Division of Tourism.

Fremont County has an enormous stream of visitors traveling through it on their way to Yellowstone National Park, nearly 2.3 million vehicles on Highway 20 north of Ashton in 2007. It has numerous world-class attractions within its borders. Yet its share of tourism employment, at 6% direct and 9% total is less than the state averages. Clearly there is potential for growth in this industry.

The Figure T-1 below shows that tourism activity, as measured by lodging sales, has been growing slowly but steadily over time. However, much of this growth is due to inflation in lodging rates. The same Global Insight study estimated a total of \$14.2 million in visitor spending in Fremont County in 2004. Of that total \$6.91 million was spent on lodging (higher than that reported in lodging sales for tax purposes), \$4.31 million on shopping, \$1.87 million on food, about a million dollars on entertainment, and \$150,000 on transportation within the county. Visitor spending nearly doubled in five years from \$7.13 in 2000 to \$14.2 million in 2004, despite a slight fall-off in the wake of 9/11.

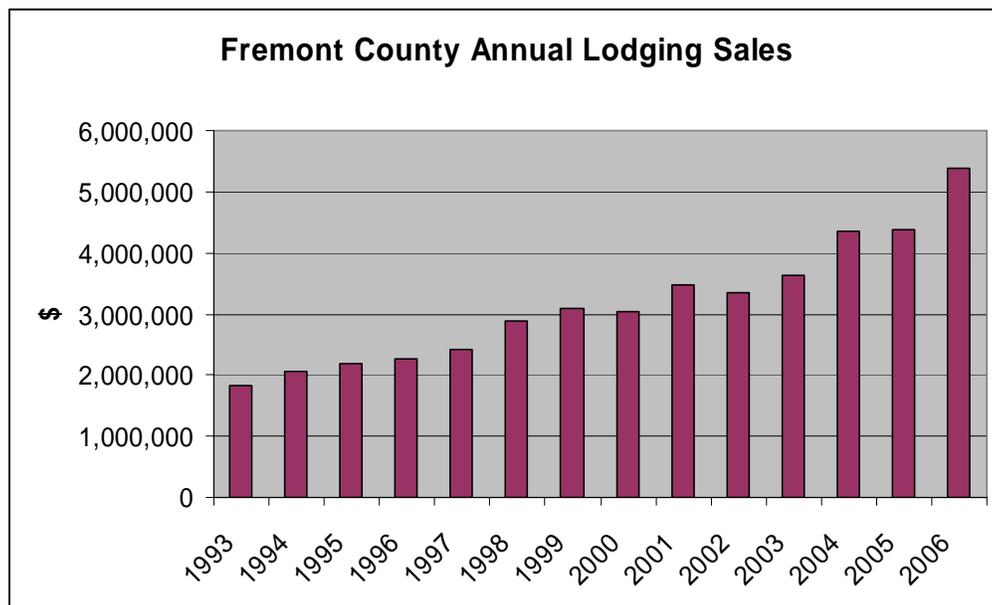


Figure T-1

Figure T-2 shows lodging sales expressed as a % of annual for each month of the year. It reveals a strong pattern of seasonality with a peak season from June through

October. This is a similar pattern to the seasonality of traffic counts, shown here for 2005 on Highway 20, and the Highway 47 scenic route, though the lodging pattern extends a bit deeper into fall.

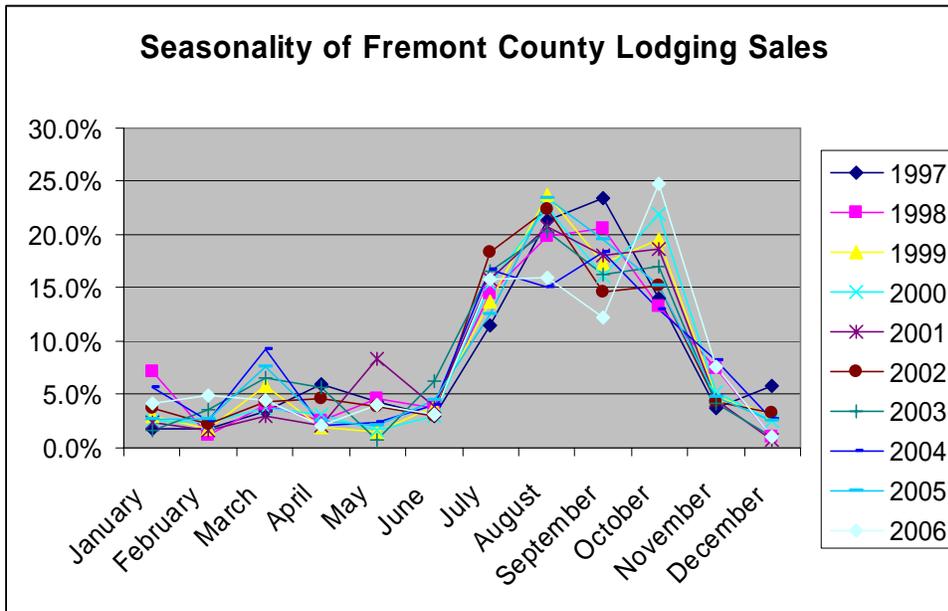


Figure T-2

Average Daily Traffic Count in 2005

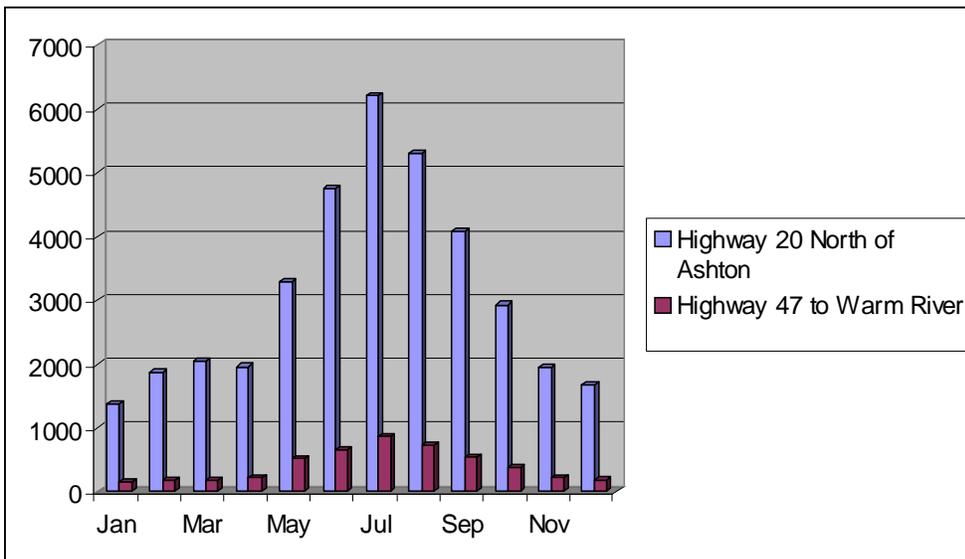


Figure T-3

The Yellowstone Business Partnership report “Turning On the Off-Season” examined the ratio between summer peak and winter employment in the counties surrounding the

park. In 2005/6 Fremont County employment was 16.3% higher at its summer peak. The good news is that the seasonal fluctuation has dropped from 26.4% in 1990/1.

Fishing Impacts. Fishing represents a major recreational activity in Fremont County. The Henry’s Fork of the Snake River is a world-renowned trout fishing resource. A study by Loomis estimated a total of 178,000 visitor-days fishing or boating on the Henry’s Fork (including Henry’s lake) from May through September in 2004. About seven-eighths, or 87.2%, of the visitor days were for fishing versus boating. Numbers from a 2003 Idaho Fish & Game survey yield an even higher 255,000 angler days in 2003.

That study found visitors spent an average of \$304 per trip. Total spending on Fremont County fishing destinations was estimated at \$50.8 million, but as much as 40% of that amount was spent out of the county on airfare, fishing equipment, and groceries. The Loomis study estimated \$29 million in spending in the six-county Eastern Idaho region from visits to the Henry’s Fork. It found that an additional 1000 anglers on the Henry’s Fork would create 5.4 additional jobs. Note that both of these estimates are considerably higher than the \$14.2 million in total visitor spending estimated by Global Insight.

Note that the majority of these days were likely spent in the northern part of the county on Henry’s Lake and the Henry’s Fork. However, in 2007, the state record brown trout was caught in Ashton Reservoir, and many believe there is potential for expanded fishing in the southern reaches of the Henry’s Fork below the caldera.

Fishing Access. In addition to federal and state managed sites, Fremont County maintains fishing access at the following locations:

- ⇒ Henry’s Lake
 - Frome Park, west side of Henry’s Lake

- ⇒ Island Park Reservoir
 - West End
 - Island Park
 - McCrea’s Bridge
 - Buttermilk
 - Mill Creek

- ⇒ Henry’s Fork of the Snake River
 - Upper Last Chance
 - Stone Bridge (near Warm River)
 - Fremont County Boat Docks (north of Ashton)
 - Ora Bridge Access (west of Ashton)
 - Vernon Bridge Access (farther west of Ashton)
 - Fun Farm Bridge
 - Salem Bridge



Tourism and Recreation Assets

Action strategies can be divided into three categories:

1. **Product** – Strategies that improve the quality and number of tourism products in the county.
2. **Promotion** – Strategies that help get word about the tourism products out to more people, or targeted market segments, in new ways.
3. **Partnership** – Strategies that form new working relationships to improve product with better access or more convenience or to conduct more effective promotional activities.

The following list of tourism assets describes the products that Fremont County tourism businesses have to work with.

- ⇒ **Yellowstone National Park.** Fremont County is the only county in Idaho to contain a portion of a national park. A total of 1,197,000 visitors entered the park at West Yellowstone in 2006 with a May-October peak season out of total park visitation of 2.8 million people. 2007 saw an 8.8% increase in visits.

- **Cave Falls** – This entrance to the park is technically within Wyoming, but can only be accessed via Idaho. Not only is Cave Falls a destination in itself, but there are wonderful day hikes and a trailhead for longer backpacking and horse packing trips up the Bechler river into the park.



- ⇒ **State Parks**

- **Harriman State Park** The Harriman family donated the 15,000 Railroad Ranch to the State of Idaho in 1977. The park contains the 11,000 acre Harriman Wildlife refuge which offers safe haven to moose, elk, deer, bear, and abundant waterfowl including trumpeter swans. The Henry’s Fork winds eight miles through the park and offers excellent fly fishing. Twenty miles of trails are available to hikers, mountain bikers, and equestrians and they are groomed for Nordic skiing in the winter. In addition, the historic ranch buildings offer lodging for small and large group gatherings, along with two yurts. Guided horseback tours and chuck wagon dinners are also available.
- **Henry’s Lake State Park** – This 685 acre park has a campground with 45 sites. The real attraction is the lake and the wonderful views overlooking it.
- **Mesa Falls Recreation Area** – This area is owned by the Targhee National Forest and managed by Idaho Parks & Recreation. Upper Mesa Falls may be the most scenic waterfall in the State of Idaho, access by paved and railed, handicapped-accessible walkways. An estimated 110,000 people



visited Mesa Falls in 2006. Grandview Campground is available as well.

- ⇒ **Big Springs/Johnny Sack Cabin** – This attraction is part natural, part historic. One of the largest freshwater springs in the world form the dramatic beginning of the Henry’s Fork of the Snake river as they flow from the base of the Yellowstone caldera. The crystal-clear waters are remarkable and hold trophy trout that can be fed from a bridge. About 12,000 people visited the Johnny Sack Cabin in 2006, but several times that many visit Big Springs every year.



- ⇒ **Targhee National Forest** – There are 525,866 acres of Forest Service land within Fremont County, not to mention 141,969 acres of BLM land. These public lands provide recreational opportunities of all kinds. An estimated 33,600 campers used the Forest Service campground in 2006.
- ⇒ **Scenic Byways** – Maps and interpretive signs mark the way for each of the scenic drives.
 - **Mesa Falls Scenic Byway** – Ashton to Island park via State Highway 47
 - **Fort Henry Historic Byway** – County roads from Salem Bridge via Red Road and Yale-Kilgore Road to Island park
 - **Lost Gold Trail Loop** – County roads off the Ft. Henry byway
 - **Teton Scenic Byway** – from Ashton to Tetonia via State Highway 32
- ⇒ **St Anthony Sand Dunes Special Recreation Management Area (SRMA)** – This is a 46,000 acre area, managed by the Bureau of Land Management, that contains five active sand dune complexes. These dunes are made of white quartz sand that range from 50-over 400 feet in height. The largest dune complex is also part of a 21,000 Wilderness Study Area. Much of the area is closed in winter for the largest wintering desert elk herd in North America. During the summer season, the sand dunes have become one of the most popular motorized recreation areas in the United States. Visits have increased at an annual rate of seven percent for the last decade to an estimated 356,000 visits in 2005. The BLM campground at Egin lake offers 48 sites and operates near full capacity. In addition, there are two private resorts—Sand Hills Resort offers 109 campsites, while the Desert Oasis Resort offers 250 RV sites and 150 campsites, with a variety of amenities.
- ⇒ **ATV and Snowmobile Trails** – Fremont County offers over 500 miles of groomed snowmobile trails each winter. More snow machines are registered for Fremont County than any other county in Idaho. While some of the trails east of Highway 20 are closed in the summer due to grizzly bear habitat, there remain numerous ATV trails within the public lands of Fremont County

⇒ **Hess Museum** – The Hess Family’s remarkable collection of farm equipment, buildings, and Americana was recently donated to Fremont County. Work is underway to find a permanent home for the collection and to make it more accessible to the public.

⇒ **Events**

- **Island Park Winter Fest** – mid-January
- **Ol’ Ladies Classic Snowmobile Race** – January in Island Park
- **American Dog Derby** – Begun in 1917, this is America’s oldest sled dog race in the lower 48 states. www.americandogderby.org
- **Fisherman’s Breakfast** – This annual event marks the opening day of trout fishing in St Anthony.
- **Sand Fest** – June 2007 marked the first year of this new St Anthony event. Nearly 250 ATV participated in a parade through town and other activities.
- **Ft Henry Buckskinners Mountain Man Rendezvous** – June
- **Fourth of July Celebration** – Ashton
- **St. Anthony Pioneer Days** – weekend closet to July 24, draws over 10,000 for parade, musical production, rodeo, etc.
- **Mesa Falls Marathon** – Participation topped 500 in 2007 on this August race from Mesa Falls into Ashton.
- **St. Anthony Summerfest** – Third Thursday in August, 5-9 PM street fair



Fishing the Henry’s Fork at Harriman

Off-Season Activities. Figure T-4 below is taken from a study of 1,693 visitors to the Yellowstone-Teton area in fall/winter/spring. It demonstrates the potential of increasing visits with a variety of guided activities, trails, and museums.

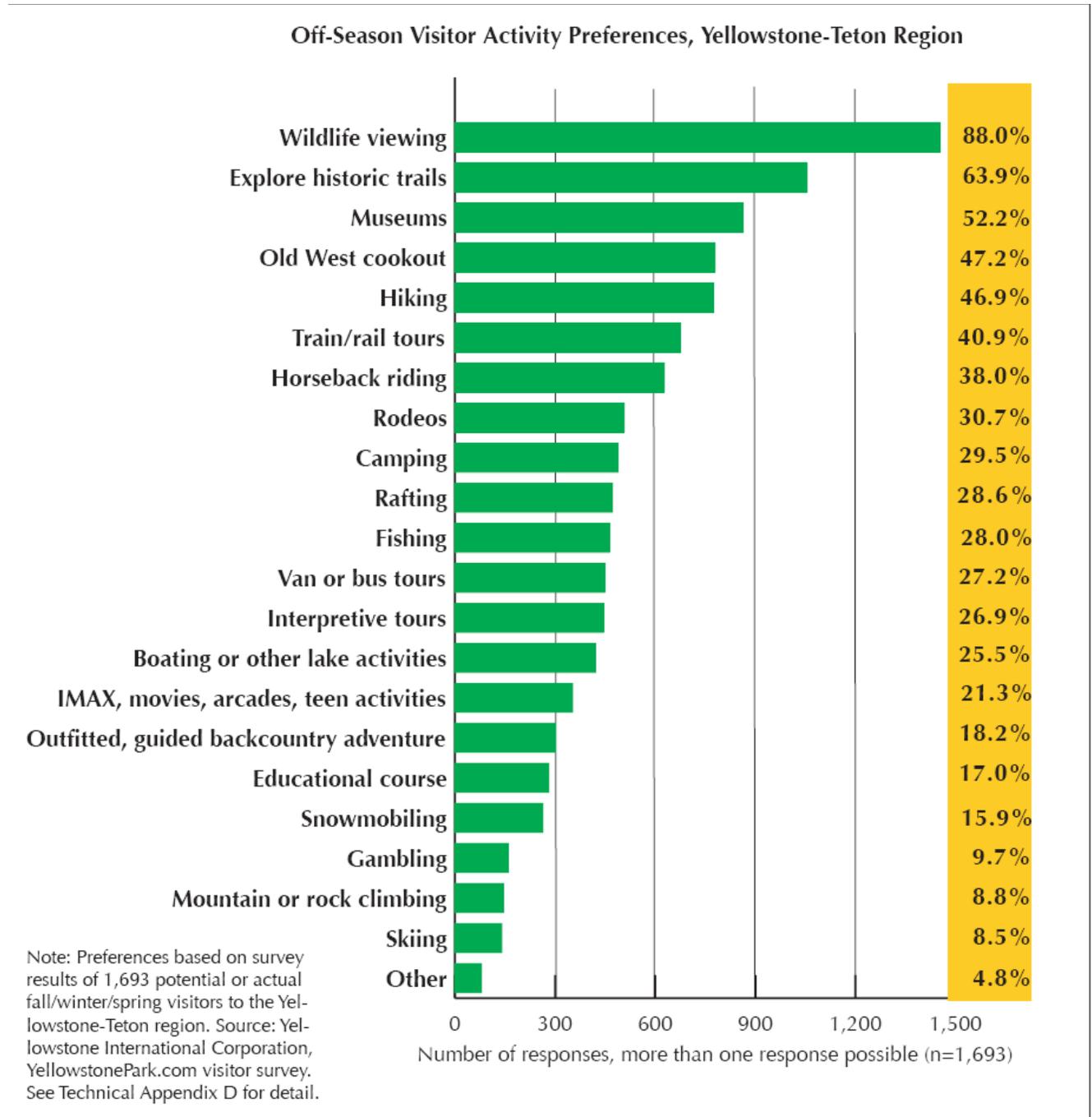


Figure T-4 Source: "Turning On the Off-Season," Yellowstone Business Partnership

Summary. Fremont County has a rich year-round asset base for tourism and recreation, coupled with a stream of nearly 2.3 million vehicles traveling through the county on Highway 20. The county has high leakage in visitor spending both south to Rexburg and north to West Yellowstone, yet visitor spending has been growing steadily. Historically, the Island Park area provides one of the weekend playgrounds for residents of Idaho Falls, in the manner that McCall serves Boise, but these local visitors are blended with a strong contingent from neighboring states and a large international visitor stream making the grand tour of Western national parks. Recent restrictions on winter use of Yellowstone National Park create new opportunity within the caldera. All these factors sum to major potential to add value to the visitor experience and to capture more visitor spending within Fremont County.

References:

Fremont County Economic Development, "Fremont County Community Profile 2007-8"

Global Insight, "The Economic Impact of Travel and Tourism in Idaho," September 2005, <http://tourism.idaho.gov/Portals/16/Documents/pdfs/InsightStudy.pdf>

Loomis, John, "The Economic Value of Recreational Fishing & Boating to Visitors and Communities Along the Upper Snake River", Department of Agricultural and Resource Economics, Colorado State University, May 2005

Yellowstone Business Partnership, "Turning On the Off-Season," April 2007, Bozeman, MT, www.yellowstonebusiness.org

Tourism – To market a growing array of attractions and activities for visitors year-round.

1. To coordinate visitor information county-wide
2. To increase the linkage between the St. Anthony Sand Dunes and the community of St. Anthony, in order to capture an increasing amount of visitor spending within the county.
3. To increase the capacity of Fremont County to house visitors.
4. To expand and promote the various land and water trail systems of Fremont County

T1 Sand Dunes Business Network

T2 Group Tour and Guided Services Network

T3 National Geographic Geo-tourism Initiative**T4 Hess Museum****T5 Regional Visitor Fishing Licenses and/or Snowmobiling Permits****T6 Increase Public Access to the Lower Henry's Fork****T7 Increase Wildlife Viewing Opportunities****T8 Enhance Tourism Web Sites****Other Action Ideas:**

- There are numerous other actions suggested in Appendix 7, the Tourism Workshop Report.
- Link with existing efforts – support them
- Create a new team for trail system improvements
- ATV/Snowmobile Trail between Dunes & St. Anthony (all sand), Ashton, Island Park & outlining the community
- Support the provision of additional on-site services at St. Anthony Dunes
- Develop the American Orient Express connections within Ashton
- Remove communication barriers w/Yellowstone National Park & Grand Teton National Park (need local calling to parks like Bozeman has to YNP) & 800#
- Encourage resort investors to look at improving existing/old motels and outdated resorts.
- Central web site @ regulations/registration information. Rec. vehicles or all types – boats, ATV, snow machines
- Finish Rails to Trails – Ashton to Tetonia (landowner problem resolved. This is a great resource with more potential than being realized. Could be part of Great Western Trail Canada-Mexico)
- Build on Existing Events – Summer fest, Fisherman's Breakfast, Mesa Marathon, Dog Derby
- Encourage construction of a Visitors Center at State line going into West Yellowstone
- Survey needs of people in Yellowstone as tourists.
- Create virtual tours of Fremont County attractions, e.g. motel TV channel
- Create kiosks screens to show local attractions
- Convene county motorized recreation working group to address issues.