

TOURISM INDUSTRY EXAMINATION AND ANALYSIS:
"PRAIRIE DISCOVERY AND VISITORS CENTER"
MANHATTAN, KANSAS



STRATEGIC FOCUS

"Manhattan, The Little Apple"

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David L. Edgell, Sr., PhD

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EXECUTIVE SUMMARY

The tourism business is perhaps the largest industry on earth. When strategically well-planned and executed, tourism provides an economic stream both into and throughout a community and an incentive to preserve the best things a community, or destination, has to offer---from its wildlife habitats, its historic districts, or great scenery, to its local culture and heritage. Properly integrated as part of an overall local economic strategy, tourism can provide economic development, environmental sustainability, social benefits, and an improved quality of life for the community. **The “Prairie Discovery and Visitors Center” (Center) offers a unique opportunity for such integration and to further showcase the Manhattan, Kansas area as an important tourism destination.** The Center can become the conflux of a successful redevelopment for downtown Manhattan. By its proximity, it would also become a regional celebration of the Konza Prairie, the Flint Hills, the City of Manhattan, Riley County, and Chase County.

Tourism is a valuable industry creating jobs, producing additional income, spurring economic development, promoting economic diversification, adding new products (for example, the planned Center), growing more businesses, increasing tax revenues, and contributing to economic integration. Tourism is a growth industry that is forecast to continue to grow and is historically associated with rising per capita income, lower relative travel costs, increased leisure time, sound promotional policies, changes in consumers’ tastes/preferences toward travel, abundance of recreational opportunities, and special new products such as the Center. **Tourism impacts greatly on the economy of Manhattan.** While the economic aspects of the Center are significant, planning should also emphasize the area’s environmental integrity and the social benefits to the community, notably enhanced human welfare, happiness, and quality of life improvements.

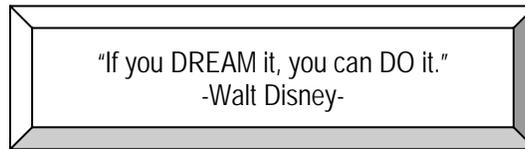
The Center, as planned for Manhattan, Kansas, is broader in concept than that held in the traditional view of a museum, but it certainly does fit the literal definition of a museum. The International Council of Museums defines a museum as “.....a non-profit making, permanent institution, in the service of society and its development, and open to the public, which acquires, conserves, researches, communicates and exhibits, for the purpose of study, education and enjoyment, material evidence of man and his environment”. **The Center would have as a focal point a representative viewpoint of the broad spectrum of the “prairie” of yesterday, today, and tomorrow, inclusive of the history, heritage, and culture of the City of Manhattan, Riley County, and nearby environs.**

The Center can draw on the commitment of the Kansas Travel and Tourism Development Division to further research, develop, and promote the Flint Hills Region as a unique natural resource tourism destination for the state of Kansas. There is a strong relationship between the

Flint Hills and the current hot tourism topic of “sustainable tourism” that includes the natural environment (tourism products such as ecotourism, agritourism, adventure tourism, rural tourism, and geotourism) and the built environment (tourism products related to history, heritage, culture, arts, and unique structures). Identified opportunities in the Manhattan area currently include scenic highway tours, native grassland preserve eco-tours, hunting, bird watching, hiking, camping locations, historic areas, cultural sites, sports, Native American culture, fishing, golf courses, parks, rivers, panoramic picturesque views, shopping centers, university programs, forts, pioneer history, events, museums, and more. The proposed Center will be sited in a good location - near the Flint Hills - for presenting a unique museum that would house both static and interactive exhibits showcasing several characteristics of the prairie, including the natural ecosystem, wildlife, weather, history, heritage, Native American culture, and the geography of the terrain. **The synergism of the Flint Hills area and the Center would draw on each other and would produce substantial additional visitation to the area.**

The July/August 2005 issue of *National Geographic Traveler* contains an article titled: “Destination Scorecard: How Do 55 National Park Regions Rate?” This article “rates” the condition and quality of U.S. and Canadian National Parks as visitor destinations. National Geographic’s Center for Sustainable Tourism polled some 300 experts in sustainable tourism (including the consultant on this project) to assess destination quality and park management. Out of the 55 park destinations, The Kansas Tallgrass Prairie National Preserve (Park) received a good score and was in 14th place. **Comments about the Park were as follows: “The interpretation of what the tallgrass prairie once was will stagger the imagination---a great stop for cross-country drivers.”** The article went on to say that the Park was: “Too small to portray the vastness it represents, the Park drew panelist calls for ‘more of everything’”. This is an unbelievable endorsement of the Center which could “portray the vastness it represents” and add “more of everything”. This article alone is an impressive call to action for development of the Center.

This report presents ideas and opportunities as a foundation upon which future tourism development in Manhattan can expand if the Center, as proposed, is built. The analysis will help managers and planners better understand how to connect the tourism components and promote cooperation. The ultimate goal of the Center from a tourism perspective is to provide optimal benefits to all tourism stakeholders (local and state) in their pursuit to capture the travel dollar from a portion of the traveling public. Most important is the increased enjoyment for visitors, but more importantly, for the local community. It would become the marketing icon for a quality tourism product. **Based on the information in this report, in conjunction with the Canyon Research Southwest, Inc. “STAR Bond Feasibility and Market Study” and the Manhattan Attractions Committee reports, the Center should be developed as soon as possible and should qualify for partial financing through the Kansas STAR Bonds program.**



STRATEGIC FOCUS

"If you build it they will come" worked in Hollywood's *Field of Dreams*, but in our real-life tourism business, the home run is based on which markets are projected to yield the best returns. Tourism arrivals, revenue, and the highest "return on investment" should be perused to guide program decisions as the City of Manhattan contemplates development of the "Prairie Discovery and Visitors Center" (Center). This Strategic Focus highlights and reviews certain aspects of the tourism industry in the State of Kansas, with a special focus on the Flint Hills region, and analyzes the potential market share for the City of Manhattan in conjunction with the greater area of Riley County, resulting from building the Center. A general maxim is that if you project a strong, inviting image for a place, give the visitor a good product, and concentrate on the right markets, it positively enriches tourism, economic development, and improves the quality of life for local citizens. The Center's program must work harmoniously with the Manhattan area to aggressively present strategies that project Manhattan's superb lifestyle image, whether as a place to visit, live, work, enjoy, or retire.

Building the Center should yield the following benefits:

- ◆ Manhattan and Riley County will be better positioned to capture increasing demand from travelers interested in historical, cultural, and environmental experiences;
- ◆ The unique natural attributes of Manhattan, Riley County, Chase County, and nearby areas will be highlighted;
- ◆ The tourism product in Manhattan and Riley County will be expanded;
- ◆ The Manhattan and Riley County tourism experience will be further differentiated; and
- ◆ The quality of life of the local community will be improved.

The main focus of this report: *Tourism Industry Examination and Analysis: "Prairie Discovery and Visitors Center", Manhattan, Kansas* is to fine tune the documentation currently available, complete a brief analysis of the attributes of the Center, and confirm some of the estimates and forecasts of visitors to the area as a result of building the Center. It also provides important information for potential funding and investment in the project.

Focus

The City of Manhattan is working with Dial Realty Corp, a developer from Omaha, Nebraska, to redevelop portions of the downtown area in Manhattan. Over the past two years the Manhattan Community has developed a conceptual master plan that includes an attractions component within Manhattan's "Downtown Redevelopment" project. As part of this effort, a "Prairie Discovery Visitors Center" is planned to be built, provided the estimates and forecasts of potential visitors to the Center warrant such action and suitable financing can be achieved.

The Manhattan "Attractions Committee" focused on the concept of developing a venue highlighting the Manhattan community and the region. This Committee decided on a "discovery center" to celebrate the natural resources in and around the Manhattan area - the Flint Hills, Konza Prairie Biological Station, and The Kansas Tallgrass Prairie National Preserve - hence the "Prairie Discovery Visitors Center". The Center would house both static and interactive exhibits featuring several aspects of the Prairie, including the natural ecosystem, wildlife, weather, history of the area, the cultural aspects of Native Americans and of early settlers, and other related historical and nature attributes. There would also be a focus on a series of interactive components both inside and outside the Center to engage the visitors and provide a unique learning experience every time they visit the facility. Educational programming would be a highlight of the Center to accommodate classrooms, field trips, and family vacations. Logical potential partners in this endeavor, which would provide a priceless hands-on experience of the prairie, are The Konza Prairie Biological Station, The Kansas Tallgrass Prairie National Preserve, The Smithsonian, as well as a possible special link and affiliation with the Natural History Museum in Washington, D.C. Other partners may include corporate sponsors, foundations, individual contributors, the State of Kansas, and volunteers (additional potential partners are noted later in this document).

The Center would not only focus on the Manhattan area, but also the surrounding areas including Fort Riley's Army post, the "Oz Museum" in Wamego, The Kansas Tallgrass Prairie National Preserve near Cottonwood Falls, Tuttle Creek and Milford Lakes, the Pony Express Museum in Marysville, the Eisenhower Library and Museum in Abilene, Council Grove, Junction City, Paxico, and other community partners.

Background Information

Manhattan, Kansas is a key destination in the State. As a result, it is important in the analysis of the Center to review data and tourism directions for the State as they relate to this project for the City of Manhattan.

The State of Kansas Travel and Tourism Development Division launched a major research effort in 2004-2005 delving into the marketability of the State as a tourism destination. Much of

the research effort was captured in a document titled: *Kansas Tourism Opportunities: Strategic Overview*, March 31, 2005. To some degree, tourism increases to Riley County and the City of Manhattan will be as dependent on the overall strategic tourism plan for the State of Kansas as it will be on the new infrastructure and promotions planned by the City of Manhattan. This report will include some relevant information from the March 31, 2005 Strategic Overview to support Center documentation.

Another key source utilized in this report on the Center is the *STAR Bond Feasibility & Market Study* conducted by Canyon Research Southwest, Inc., December 2004. Information from this study was found to be significant and accurate regarding the Center and will be appropriately acknowledged and included as it seems significant for purposes of this report .

This Strategic Focus also relied on information from the Manhattan Attractions Committee's reports as they pertained to the Center.

A fourth source of information important to this report on the Center is the tourism information related to the Flint Hills and Tallgrass Prairie Regions of the state which are included in the study: *Assessment of the Economic and Tourism Impacts of Citing Wind Energy Developments in Kansas Natural Areas*, 2004, by FERMATA, Inc. The above document was prepared for the Kansas Travel and Tourism Development Division.

A fifth source of useful information for this Strategic Focus on the Center was derived from surveys and data developed by the State of Kansas Travel and Tourism Development's marketing agency, Callahan Creek.

A sixth and significant source of important tourism reports utilized throughout this report was made available from Travel Industry Association of America (TIA). TIA data, statistics, and studies are the most utilized tourism documentation in the U.S.

A seventh source of information consulted for this report included two important *National Geographic Traveler* articles on sustainable tourism: "Destination Scorecard: 115 Places Rated" (March 2004) and "Destination Scorecard: How Do 55 National Park Regions Rate?" (July/August 2005).

Many other reference materials have been reviewed for this report and will be acknowledged in the References section at the end of this document. The information on the City of Manhattan was largely provided by the Manhattan Area Chamber of Commerce, the Manhattan Convention & Visitors Bureau, the Manhattan City Manager's Office, and those who volunteered data and reports. Special conceptual documents on the Center were provided by Dial Realty Corp.



"Kansas, As Big As You Think."
-Brand Image for the State of Kansas, 2005-

ECONOMICS OF TOURISM EXPLAINED

Global Tourism

New research by the World Travel and Tourism Council indicates that tourism in 2004 generated direct employment as well as induced employment for approximately 215 million people worldwide, or 1 in every 12.3 jobs. By 2014, it is predicted that employment will reach approximately 260 million jobs, or 1 in every 11.6 jobs. According to the report, global tourism (both domestic and international) is approximately a \$5.5 trillion industry that will continue to grow in the future, reaching \$9.6 trillion in 2014. As an economic factor, tourism is growing faster than the rest of the world economy in terms of visitor expenditures, export output, capital investment, income, and employment.

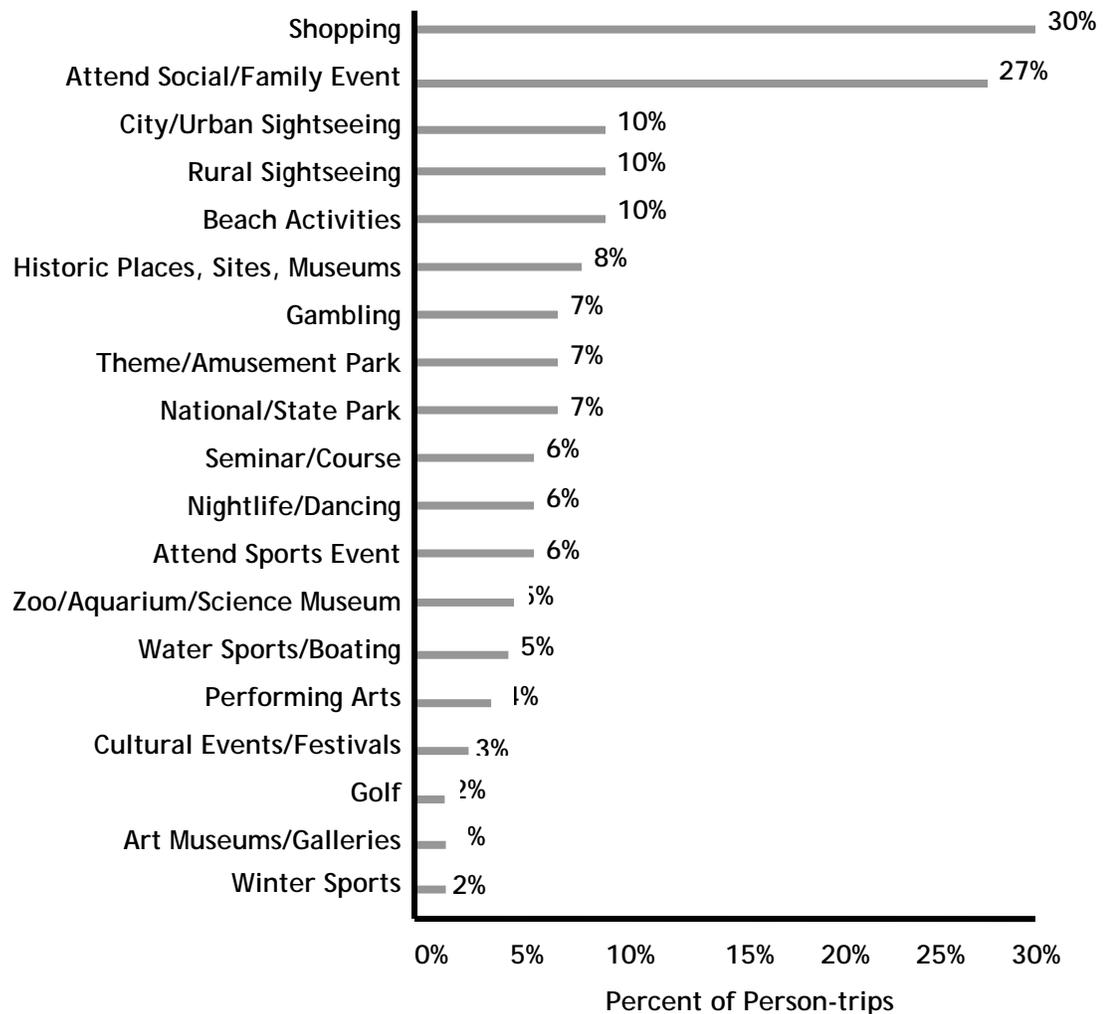
National Tourism

According to the Travel Industry Association of America (TIA is the umbrella organization representing all facets of tourism in the United States), overall traveler spending by domestic and international visitors in the U.S. in 2004 was over \$600 billion, up from \$555 billion in 2003. Projections for 2005 indicate an additional 5.6 percent increase that would bring expenditures to \$634 billion. The forecast also reported that two of the hardest-hit segments in the travel industry, domestic business travel and international inbound travel, will both see their first increases since before the September 11, 2001 tragedy, as 2004 business trips reached nearly 144 million and are likely to increase another 3.6 percent to 149 million in 2005. Also, international arrivals to the U.S. rose above 7.5 percent in 2004 and are forecast to increase 5 percent in 2005. Following several years of decline, international travel to the U.S. appears to be vibrant and showing healthy growth. The world economy (including the U.S.) appears to be rebounding somewhat in 2005 as improved safety and security measures are in place and people are "in the skies" and "on the road again".

Understanding why people travel and the activities they enjoy during their trip is important. The following chart (Chart 1) indicates the activities participated in by all U.S. travelers. These activities depend on the destination choice and season of travel.

CHART 1.

DOMESTIC TRIP ACTIVITY PARTICIPATION BY U.S. TRAVELERS (2003)



Source: Travel Industry Association of America

Kansas Tourism

While the data for Kansas travel is incomplete, there is no reason to suggest that domestic and international travel to Kansas was any less than the national average. Kansas permeates an image as a safe, secure destination and that has become increasingly important since the tragic incidents of 2001. Also, Kansas is considered a real "travel bargain" which has been a key consideration in the recent increases in travel. Automobile travel was the first segment of the travel market to rebound and because the traveler was conscious of travel expenditures, Kansas, as a tourism destination, showed some upsurge in 2003, 2004, and the first

half of 2005. The most common source of data available on tourism on a state-by-state basis is produced by TIA. TIA has an extensive research office that collects and surveys states and other entities to produce the most reliable tourism statistics published in a yearly publication titled *Tourism Works for America*. This document was first published in 1991 and has become required reading for anyone interested in or connected with the U.S. travel and tourism industry. TIA also publishes numerous in-depth research studies that contain information by state. This report has relied heavily on TIA data for general statistics for the State of Kansas.

The data clearly shows that Kansas relies more on automobile travel than most states and was cited by the Automobile Association of America as the least expensive destination. A brief review of the limited data for Kansas follows. A TIA 2004 report showed that in 2002, domestic travelers spent about \$3.7 billion in Kansas, a 1.6 percent increase from 2001. There is no question that tourism is an important contributor to the state's economy. Business and leisure travelers are experiencing the recreational, historic, and natural advantages of the state and its facilities. Thanks to strong relationships with travel writers, motorcoach tour operators, individual travelers, the international travel community, and the Internet, the word about Kansas as a tourism destination is getting out. Of course, it does not hurt that Kansas is often ranked among the top vacation bargains. Spending on auto transportation led all other expenditure categories with \$972.2 million, 26.3 percent of the state total. Kansas ranked thirty-eighth in receipt of direct domestic travel expenditures among all 50 states and the District of Columbia in 2002.

A total of 55 thousand jobs, with \$881.8 million in wages and salaries, were supported by domestic travel spending in Kansas during 2002. Travel-generated jobs comprised 4.1 percent of the total non-farm employment in Kansas. The foodservice industry generated more jobs than any other industry sector, accounting for 19.6 thousand jobs, or 35.6 percent of the state total. Domestic travel spending in Kansas also generated \$560.9 million in tax revenue for federal, state, and local governments in 2002.

New Tourism Research in Kansas

In 2004, Callahan Creek, the Kansas Travel and Tourism Development Division's contract marketing agency, conducted important consumer research for the state. An overview of some of that research included the fact that approximately half (48%) of those individuals requesting Kansas travel information subsequently visited the state. It is interesting to note that visitors mainly cited vacation/pleasure (42%), passing through (25%), and visiting friends/relatives (19%) as the key reasons for their trip. Historic attractions, a part of "sustainable tourism" as described later, was the most important activity of participation. The data from Callahan Creek bodes well for the development of the Center.

The three charts that follow this section show the following:

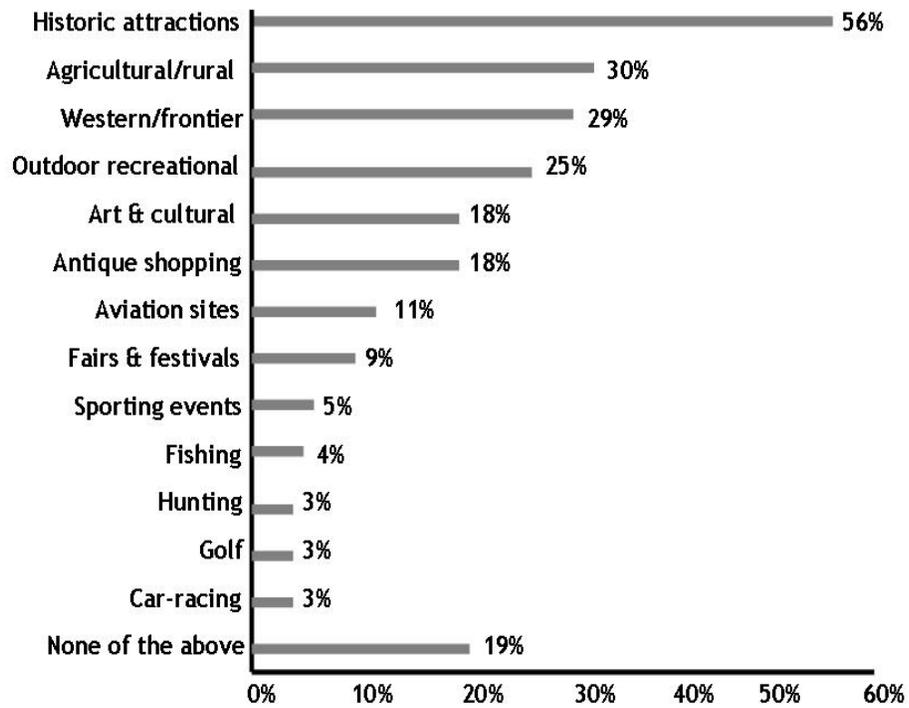
CHART 2. Activities that visitors to Kansas participated in

CHART 3. Image of Kansas as expressed by visitors to Kansas

CHART 4. Vacation attributes, in order of their importance.

CHART 2.

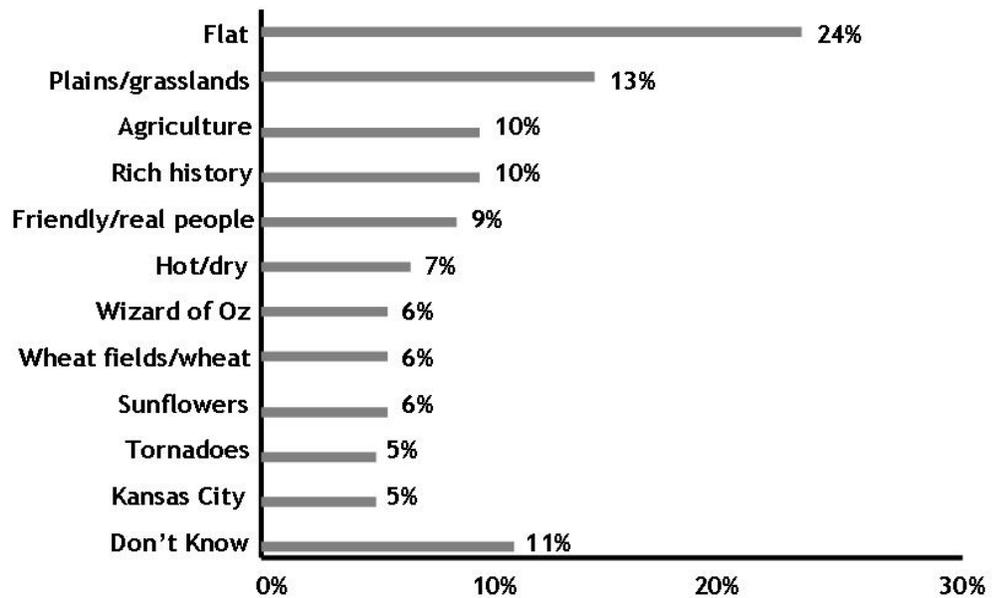
ACTIVITIES—PARTICIPATED



Source: Callahan Creek

CHART 3.

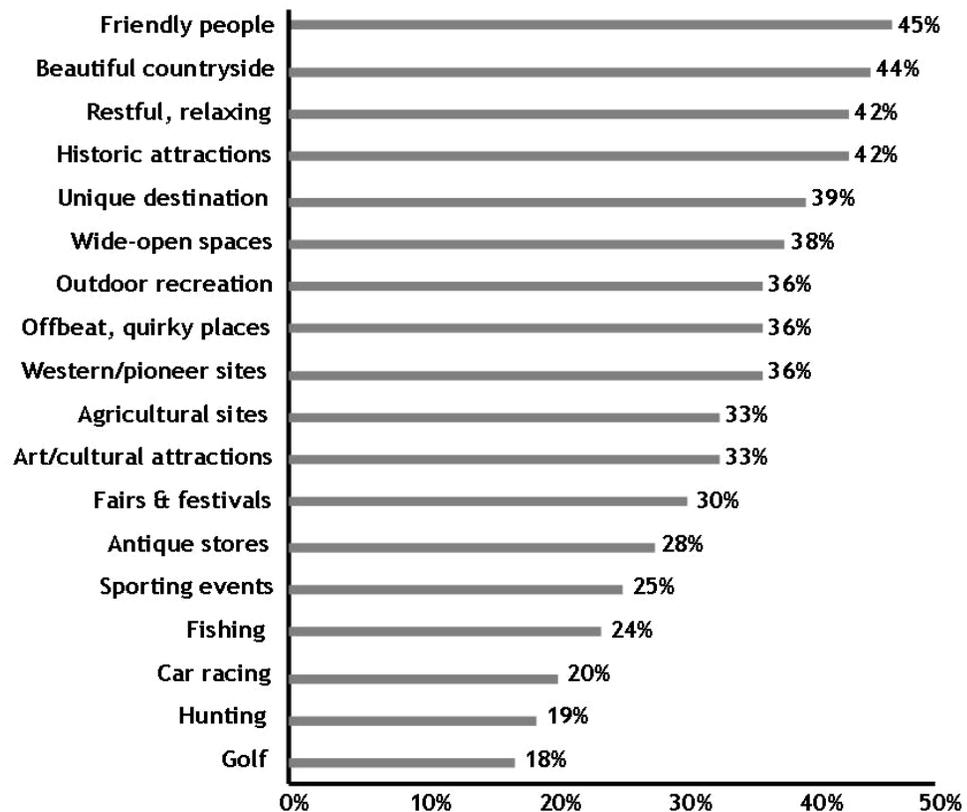
IMAGE OF KANSAS



Source: Callahan Creek

CHART 4.

VACATION ATTRIBUTES - IN ORDER OF IMPORTANCE



Source: Callahan Creek

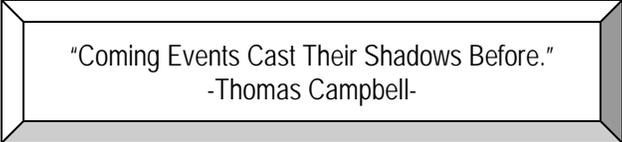
Most of the inquiries about traveling in Kansas come from not only within the state but also principally from the states of North Dakota, South Dakota, Minnesota, Iowa, Missouri, Illinois, and Oklahoma. Popular leisure activities range from visiting historic attractions to Western/pioneer sites. Important attributes of the vacation destination that Kansas offers are safe/secure destinations, friendly people, good value, restful and relaxing environments, beautiful countryside, unique experiences, friends and family relationships, wide-open spaces, historic attractions, and outdoor recreation. The Callahan Creek study has considerable useful and detailed information, including an important section on "Consumer/Travel Trends". Some of the trend information suggests that 2005 will be a good travel year; safety and security will continue to be important; culture, arts, history, and heritage will become increasingly significant reasons for traveling; and "reality" experiences (what some tourism experts are increasingly referring to as "experiential tourism") are growing in popularity. The study suggests that important opportunities for Kansas that are high on the travelers "to-do" lists include:

- ◆ meeting friendly people,
- ◆ seeing beautiful countryside,
- ◆ a chance to relax,
- ◆ visiting historic attractions, and
- ◆ uniqueness of the destination, plus many more.

CHART 2. shows strong participation by visitors to Kansas to visit historic attractions. Agricultural/rural, western/frontier, outdoor recreational, and art and culture are high on the list. All these attractions and activities would have a robust relationship with the Center.

The tourism industry is dynamic, trendy, and must remain flexible to adjust to consumer interest. Most tourists are somewhat fickle, often indecisive, and easily influenced by outside factors. Sometimes the tourism products which are sought by travelers are influenced by movies, TV programming, marketing and advertising, magazine articles (especially human interest stories), Internet descriptions, word-of-mouth recommendations, and a myriad of other factors. Often, through special marketing and promotion, a product previously thought to be of little interest may emerge suddenly and become quite popular.

Based on the information provided in this section, it is clear that a tourism product such as the Center would provide an additional reason for visitors to come to Kansas.



"Coming Events Cast Their Shadows Before."
-Thomas Campbell-

EMERGING TOURISM OPPORTUNITIES IN KANSAS

Trends in Tourism

It is important that Kansas be on the cutting edge in terms of understanding the latest trends in tourism (what the tourism consumer wants in their tourism products) and determining which Kansas tourism products match that market demand. One good source of tourism trend information includes the research reports prepared by TIA. Some recent trends that are particularly relevant to Kansas are discussed below.

In a landmark 2002 study, TIA documented the strong feelings U.S. travelers have on the subject of enjoying and preserving the natural environment in their travels. The report titled, *Geotourism: The New Trend in Travel* (sponsored by National Geographic Society's *Traveler* magazine) confirms other research indicators that there is a strong market for "sustainable tourism", a trend that has recently taken on a special significance.

Sustainable Tourism

The fastest growing trend in tourism today, whether locally, nationally, or internationally, is "sustainable tourism". Sustainable tourism has different meanings to different people. Many researchers and tourism experts view sustainable tourism as a special focus on the natural environment (ecotourism, nature-based tourism, adventure tourism, geotourism, and related activities) and the built environment (history, heritage, culture, arts, museums, and other). Effort towards a better understanding of the impact of sustainable tourism on increased visitation is being led by the National Geographic Society. This organization, seeing this trend in tourism growing dramatically in the new millennium, established an Office of Sustainable Tourism in 2003. In the March 2004 issue of *National Geographic Traveler* (the most read travel magazine), a special article titled "Destination Scorecard: 115 Places Rated" ranked 115 global destinations based on criteria for sustainable tourism. The ratings transpired on a complex global survey of over 200 specialists in fields such as sustainable tourism, urban and regional planning, historic preservation, ecology, geography, travel writing and photography, cultural anthropology, and archaeology. The reviewers (which, incidentally, included the author of this report) were all well traveled enough to have a good basis for comparing destinations against each other. Museums and related cultural and heritage places were integral components of the

evaluation. The July/August 2005 issue of *National Geographic Traveler* evaluates National Parks. (NOTE: The Tallgrass Prairie National Preserve is favorably reviewed in this publication.) This trend in travel towards sustainable tourism is important to the better understanding of the potential appeal of the “Prairie Discovery and Visitors Center” to visitors. Since the Center will have a relationship to the Flint Hills region (which will be promoted as a “sustainable tourism” destination), any examination and analysis of its strategic focus must also carefully anticipate tourism trends now and into the future.

The Flint Hills region, including The Tallgrass Prairie National Preserve, is consistent with the new tourism phenomenon generally referred to as sustainable tourism. This becomes important for another reason. *National Park Traveler, 2004 Edition*, (a publication of TIA) reports that 40 percent (84.4 million) U.S. adults have visited a U.S. National Park while on vacation during the past five years. *Midwest Living*, a very important magazine to travelers visiting the Midwest, also had positive comments about The Tallgrass Prairie National Preserve. The March/April 2005 edition of this magazine, in the section entitled, “30 Things Every Midwesterner Should Experience”, it references The Tallgrass Prairie National Preserve in these words: “Smell the lush stinging wetness of a storm rumbling across a wide-open sky from amid undulating green-golden grasses in the Kansas Flint Hills. This is North America’s largest expanse of native tallgrass prairie, and it has an unforgettable sense of place that blends powerful sky, dramatic land and stirring moments.” Finally, in 2005, The Haworth Publishers, Inc., is publishing the book titled: *Managing Sustainable Tourism: A Legacy for the Future*¹ (authored by the consultant of this report) which features a case study on The Tallgrass Prairie National Preserve. In brief, the Center will enrich and enhance visitation to the Flint Hills region.

A. Rural Tourism

Rural tourism can be an important part of sustainable tourism, often inclusive of ecotourism and agritourism, and generally includes all tourism that takes place in a rural area (whereas sustainable tourism, ecotourism, and agritourism may also take place in non-rural areas). Rural America is a popular tourist destination. According to a recent TIA study, nearly two-thirds of all adults in the U.S. have taken a trip to a rural destination within the past three years. Nearly nine out of ten of these trips were for leisure purposes. Much of Kansas is considered rural and there are numerous opportunities for new tourism products throughout the rural areas of the state. The keys to opening the rural tourism door in Kansas will be to get rural communities to recognize their appeal, to cooperate with other rural areas, to identify rural tourism products and destinations, and to promote their potential tourism product opportunities.

¹ For information, go to <http://www.haworthpress.com/store/find.asp> and type in Edgell at Author/Editor.

Rural tourism in Kansas presents another opportunity, whether it is camping (overnight vacation camping is the top outdoor recreation adventure activity in the U.S.) hunting, fishing, bird watching (the second fastest growing outdoor activity in the U.S.), following trails, or some other activity in a rural area. New research suggests that hospitality and tourism will be a growth opportunity in the future for many rural areas. This research is contained in a report titled: *Competitiveness in Rural U.S. Regions: Learning and Research Agenda* by Michael E. Porter, Institute for Strategy and Competitiveness, Harvard Business School, 2004. The report states that: "Many experts highlight the common misperception that agriculture is the dominant source of employment and income in rural economies. In fact, agriculture is important in only a small number of rural counties, and its overall impact on rural regions in the U.S. is negligible." The study includes a "Cluster Mapping Project" - clusters consist of related industries within a sector that are prone to co-locate. "The traded clusters with the highest absolute level of employment in rural regions were Hospitality and Tourism, Food Processing, Heavy Construction Services, Automotive, Metal Manufacturing, and Business Services. Together, these six traded clusters (out of 41) accounted for 38.4 % of traded employment in rural regions. In comparison, the largest traded clusters in metropolitan regions were Business Services, Financial Services, Hospitality and Tourism, Education and Knowledge Creation, Distribution Services, and Transportation and Logistics, together accounting for 50.6 % of traded employment in these regions." In summary, if Manhattan, through the development of the Center, becomes the focal point for a "cluster" of tourism products in and near the Flint Hills region, the entire area will participate in the economic benefits of tourism development.

B. Ecotourism

Ecotourism has many different definitions but most revolve around the concept of tourism products connected with the natural environment and a corresponding recognition of the importance of conserving natural environmental quality. Certainly visiting areas for the purpose of observing and experiencing elements of the natural environment is not new. Safaris to Africa to view wildlife were popular amongst explorers, adventurers, and tourists over the last two centuries. Recreational activities such as hiking, climbing, cross-country skiing, fishing, canoeing, and bird-watching are all based on natural environmental features and were popular before the term ecotourism came into existence. The activities which fall under the category of ecotourism, therefore, are not new. Rather, it is a tourism term that has arrived as nature-based recreation has become increasingly popular and is being marketed to today's generation of travelers. Kansas has a great variety of ecotourism products as well as many untapped opportunities for developing new ecotourism products. The State (and the Manhattan area) can enhance and enrich traditional ecotourism related

products and link such products to other tourism activities.

This is a market trend that Kansas (and the Center) can capitalize on by highlighting more strongly its natural and geographical assets and its abundance of flora and fauna. One example of the product opportunities for this kind of ecotourism is in the Flint Hills region of Kansas. Some work conducted in this area in 2004-2005 by FERMATA, Inc. (an international nature tourism consulting group while under contract to the Kansas Travel and Tourism Development Division) details the enormous opportunities for nature and cultural tourism in, and near, the Flint Hills. FERMATA, Inc. stresses the opportunities for ecotourism in conjunction with the relatively new national park, The Tallgrass Prairie National Preserve (Preserve), a unique public/private partnership venture. Its goal is to preserve and enhance a nationally significant remnant of the tallgrass prairie ecosystem and the processes that sustain it; and, preserve and interpret the cultural resources of the Preserve and the heritage associated with the ranch property. Most of these features will be highlighted in the Center.

C. Nature Tourism

Nature tourism is an emerging subset of ecotourism. A prime example of nature tourism within the State of Kansas is bird watching. "Bird watching is the second fastest growing outdoor activity in America....." according to Ted Eubanks, President of FERMATA. Eubanks' description of the Preserve and its potential as a tourism product is a good fit for those interested in "sustainable tourism" products. He is convinced that this unique park has tremendous potential as a draw to the entire region. The Preserve offers ".....opportunities for education, inspiration, and enjoyment through public access to its geological, ecological, scenic, and historical features." This, in effect, is the epitome of what much of sustainable tourism is all about. The Kansas Flint Hills, as a region and in conjunction with the state, should take advantage of the research by FERMATA to work toward expanding sustainable tourism products which offer tourists a full plate of activities. The Kansas Flint Hills and the Center would be good partners.

D. Cultural Tourism

In a TIA study (sponsored by *Smithsonian Magazine*, 2003) titled: *The Historic/Cultural Traveler*, another major trend in tourism is identified: "Cultural, arts, historic, and heritage activities or events (including museums) are quite popular among U.S. travelers today. In fact, most U.S. adults (81 percent) who took at least one trip of 50 miles or more away from home in the past year included at least one such activity or event while traveling...This represents over 118 million adult historic/cultural travelers". Such a trend is another opportunity for Kansas tourism and for the Center. Kansas is historically and culturally rich,

with interesting small towns and communities and many special local museums and art galleries. The Native American history and culture throughout the state offers an abundance of special tourism product opportunities. There are many additional interesting historic themes: from life on the prairie, heritage connected to the Civil War, the unique Eisenhower Museum, air and space museums, the birthplace of Amelia Earhart, and many others. Cultural tourism is so important that this report includes a special section, which explains its significance, to the tourism industry.

The Marketing Mix

Finding the right marketing strategy for the Center will be a key to its success in drawing visitors from near and far. The most popular book used in the tourism industry, *Tourism: Principles, Practices, Philosophies* (*Tourism* - Ninth Edition) by Charles R. Goeldner and J.R. Brent Ritchie addresses the marketing strategy. A brief synopsis of this section of the book suggests that in any "strategic tourism plan" the "marketing mix" - "...the right combination of elements..." for marketing a specific destination is critical. The elements of the "mix" will vary depending on the tourism product or destination. This book first lists ten marketing factors as follows: timing, brands, packaging, product pricing, channels of distribution, product, image, advertising, selling, and public relations. Other authors add to the mix "programming, people, and partnership". Still others include: "positioning, place, and planning".

In another section of *Tourism*, the authors put a particular emphasis on "partnership". They describe partnership as follows: "This highlights the high degree of interdependency among all destination stakeholders, as well as the need for alliances and working relationships that build cooperation - sometimes with competitors as well as colleagues. David Edgell's concept of 'coopetition' captures the value of partnership in a unique way". Coopetition² has become a new buzzword used to describe partnerships in the tourism industry. Usage of the word first appeared in 1995 in the book: *Coopetition: Global Tourism Beyond the Millennium* by David L. Edgell, Sr., and R. Todd Haenisch. This new word is used to describe companies, properties, or locales that might normally compete against each other locally but have learned to "cooperate" in order to "compete" (hence: coopetition) more effectively at the regional and national levels. To further explain, coopetition is the dynamic relationship involving "cooperation" at the local level to meet the "competition" in the broader tourism market. As a result, these highly competitive destinations will jointly market their products together to increase the size of the tourism pie in the larger marketplace but continue to compete locally (for a larger slice of the bigger pie). This concept has many applications for the Center and for the City of Manhattan.

² this new word is now included in the Barnhart Dictionary Companion

The Leading Edge - The Internet

Another important TIA study in 2004 of particular relevance to the tourism industry nationally and in Kansas is the *Travelers' Use of the Internet* (TIA). The use of the Internet and electronic commerce tools in tourism has become fundamental to marketing tourism throughout the United States. For states like Kansas, the Internet offers unique opportunities to put little known tourism products and destinations, especially in remote rural areas, before the large market of tourism consumers who peruse the Internet in planning their travel.

According to the TIA study, as of July 2004, "...over half of American adults age 18 or older (56%) claimed they currently used the Internet, either at home, work/school, or both." The study goes on to say: "Nearly half of travelers use the Internet for travel planning, while three in ten use it to make travel reservations. Not surprisingly, frequent travelers are more likely than infrequent travelers to indicate they use the Internet."

Niche or target marketing of the tourism product ensures information reaches those millions of visitors who are interested in a specific type of tourism product. The Internet, good Web sites, linkages, and effective use of e-mail are keys to the marketing strategies for Kansas tourism. The electronic commerce tools are comparatively inexpensive and effective in presenting efficient communication mechanisms for most communities in Kansas. It will take innovative and creative strategies to link the Center and the City of Manhattan to the right e-commerce tools driving tourism throughout the state and nation.

Effective utilization and implementation of the e-commerce tools that include target marketing, appropriate Web sites and linkages, and Internet access to planning and booking a trip will put the proposed Center on the domestic and international roadmap.

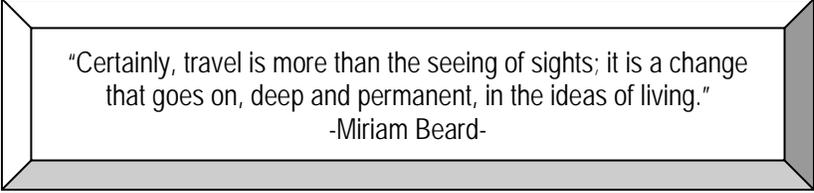
Knowing What Visitors Want

Tourism demand has changed substantially over the last five years. Several factors that have initiated these changes follow:

- ◆ The emergence of experience-based travel, referred to as "experiential tourism";
- ◆ An aging population with more time available for leisure travel;
- ◆ A larger amount of disposable income allocated to travel;
- ◆ Increasingly accessible travel information via the Internet; and
- ◆ Popularity of sustainable tourism products.

These changes are forcing a reassessment of how marketing organizations cater to travelers' needs. Kansas must change its emphasis, too. For example, the current low level of advertising and promotional dollars puts Kansas in a weakened competitive position. Kansas must increase the dollar amount of tourism expenditures as well as the effectiveness of the dollars it does spend on tourism advertising and promotion.

Clearly, factors affecting the process of and the decision to travel, along with the choice of destination, are changing. More tourists are looking for a specific experience rather than a destination (experiential tourism). Learning vacations, spas, bird watching, and sustainable tourism products (inclusive of ecotourism, agritourism, adventure tourism, historical, heritage, and cultural sites) have grown significantly in the last five years. While not much is available to measure the growth of this trend, tourism publications and promotional literature are already shifting focus in response to this demand. Development of the Center would take advantage of many of the known trends in tourism.



"Certainly, travel is more than the seeing of sights; it is a change that goes on, deep and permanent, in the ideas of living."
-Miriam Beard-

CULTURAL TOURISM OVERVIEW

Cultural Tourism Defined

Cultural tourism has been mentioned several times thus far in this strategic focus. It has become an important driver in the recent growth of tourism and deserves special emphasis in this report.

Cultural tourism is one of the most important and fastest growing tourism trends in America. Also known as "cultural heritage" tourism, it was recognized as a distinct subset of the tourism industry early on. This type of tourism has been ascribed a variety of definitions. Cultural tourism may be defined by its destination such as museums, theaters, art galleries, historical sites, architectural treasures, and heritage or ethnic events. Alternatively, cultural tourism may be defined by the motivation of cultural tourists to seek an authentic experience with a unique heritage, social fabric, or place. Nonetheless, the foundation for cultural tourism is a community's cultural and heritage assets, which include built environments (museums, theaters, and art galleries, for example), historical sites, natural environments, as well as cultural practices and collections.

The "*Prairie Discovery and Visitors Center*" planned for Manhattan, Kansas fits well within the definition of "cultural tourism". The Center should be marketed and promoted as an important museum tourism product and as a special "cultural tourism" representation to give it greater visitor appeal and to reach a broader market. The following paragraphs summarize recent findings in terms of the growth and changes in the cultural tourism phenomenon.

The Cultural Traveler

Travel Industry Association of America and *Smithsonian Magazine* produced a major study, *The Historic/Cultural Traveler 2003 Edition*, which explored the impact of cultural tourism. According to this publication, 56 percent of the U.S. adult population is considered to be historic/cultural travelers (118 million travelers). Travelers surveyed for this study reported that during 2002, they participated in at least one of fifteen cultural events - such as arts, museums, humanities, historic or heritage activities - while traveling. Furthermore, cultural travelers spend more (\$623 vs. \$457---in 2002 dollars) and travel longer (5.2 nights vs. 3.4 nights)

than other tourists. As compared to those surveyed in 1996, the demographic profile of today's cultural traveler has shifted; these travelers are wealthier (many are retired), younger (49 years of age), more educated, and more technologically savvy.

Benefits of Cultural Tourism

As many parts of the nation have been transitioning from an agriculture, mining, and timber related economy to a creative economy, states and communities have looked to cultural tourism as a means of diversifying urban and rural economies alike. Potential economic benefits of cultural tourism include: creating or maintaining jobs, increasing expenditures by visitors, increasing tax receipts, and encouraging overall economic growth. In addition to the economic benefits, cultural tourism can produce social and community development benefits. These include conveying a sense of local pride and identity, enhancing connections across a county, encouraging an entrepreneurial spirit, creating a sense of place, preserving cultural assets, and providing educational benefits. Additionally, "process" benefits of cultural tourism include improved partnerships and collaborations (coopetition) across sectors, counties, and regions as well as the development of new marketing and communication tools as a result of the cultural tourism initiative.

Cultural Tourism Development Trends

In addition, cultural tourism represents the growing statewide trend of developing agricultural tourism (related to agritourism and to rural tourism) which showcases assets in rural communities. The National Trust for Historic Preservation states: "Traveling to experience 'The Real America'. That is what rural tourism is all about, and an increasing number of remote areas and small towns are finding that there are more opportunities for rural tourism than ever before." Successful agri-cultural tourism efforts require effective collaborations among a variety of stakeholders - tourism, arts, business, developers, and agri-cultural representatives, for example.

Museums and Cultural Tourism

Museums, as mentioned earlier, are an important part of the cultural tourism phenomenon. Millions of visitors each year visit numerous different types of museums. A 2003 survey by the American Association of Museums yielded some interesting information which is contained in the following table.

TABLE 1.

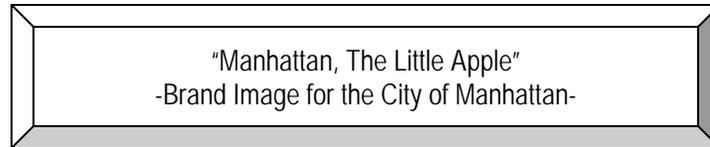
Different Types of Museum Attendance

Different Type of Museums	Attendance (in thousands of visits)*
Science/Technology Museum	183,417
Arboretum/Botanic Garden	119,575
Children's/Youth Museum	85,088
Natural History/Anthropology	64,768
Art Museum	61,312
General Museum	49,983
Nature Center	40,500
Specialized Museum	32,000
Historic House/Site	16,000
History Museum	15,000
TOTAL	667,643

Source: American Association of Museums, *2003 Museum Financial Information* survey

*Visits include each visit made to a museum. Thus the numbers include multiple visits to the same museum by a single visitor or visits to many different museums by a single visitor over the span of a year.

This table strongly suggests that the Center is on the right track in terms of the interests of most museum visitors. In effect, the Center would contain various exhibits and artifacts related to almost all the types of museums cited above. If the Center could capture just a small percentage of these visitors, it would meet and exceed the expectations anticipated in its development plan.



CITY OF MANHATTAN, RILEY COUNTY, AND CHASE COUNTY

Background

The Center would encompass, embrace, and complement the Manhattan area, Riley County, and nearby areas that are rich in nature, history, heritage, and culture. As historians, archaeologists, geologists, geographers, and genealogists continue to search the area for clues of its past, new artifacts and interesting discoveries take place on a regular basis. One of the most recognizable known cultures of the area for a substantial time period is that of the Kansa Indians. This nomadic tribe seems to have abandoned the Missouri River villages in favor of areas farther west, including the area near Manhattan. It appears this movement took place in the early 1700s. While there are no longer any full blooded Kansa Indians in existence (many inter-married with the Osage on government reservations) they left an indelible mark on the history and heritage of the area in which they lived.

As immigrant farmers moved further and further west, they discovered the fertile lands of the Midwest and particularly the wonderful soil of Kansas. As the territory of Kansas began to increase in population, construction of several forts began to take place. Early on, Fort Leavenworth was established and by the 1840s Fort Scott was constructed. By 1853, Fort Riley began to take shape and much of the early construction remains to this day. The early history of Fort Riley is closely tied to the movement of people and trade along the Oregon and Santa Fe Trails. During the 1850s, there were officers and soldiers at Fort Riley who ended up on opposite sides during the Civil War. Some more notable names included Robert E. Lee, Joseph E. Johnston, and James Ewell "J.E.B." Stuart, all of whom became famous generals fighting for the South. One of the more famous officers was George A. Custer who fought in the Civil War for the North and was later killed in the famous battle with American Indians at the Little Big Horn. This fort has museums, monuments, and other memorabilia of interest to tourists.

By 1855, the Cincinnati and Kansas Land Company left Cincinnati, Ohio on the steamboat Hartford, bound for central Kansas. Sandbars grounded the Hartford near the present-day Manhattan site where the new town of Boston was being established. New York investors insisted on the name Manhattan and the community of Boston was thus re-named. (Manhattan is one of the five boroughs of New York City, known as "The Big Apple", and it is because of this association that Manhattan, Kansas adopted the brand name of "The Little Apple".)

Manhattan: Enlarging the Tourism Destination

Manhattan, as a tourist destination, has much to offer the visitor. Manhattan has an interesting ethnicity from its Native American culture and pioneer heritage to a modern day community with amenities not found often in a medium size city in the Midwest. Some of this history is commemorated in lasting memorials that include the Goodnow House (honoring a founder of Manhattan and Kansas State University), a pioneer log cabin, the Riley County Historical Museum, Wolf House Museum, and many other sites depicting a rich heritage. To many individuals, the most known attribute of Manhattan is Kansas State University. The university has national and international recognition as an academic institution of the highest order.

One aspect of Manhattan that needs greater recognition and publicity is its offerings as a sustainable tourism destination. Sustainable tourism generally includes the “natural environment” (ecotourism, agritourism, adventure tourism, geotourism, rural tourism or, in other words, mostly “nature-based tourism”) and the built environment (history, heritage, culture and related activities). Certainly, in many cases, sustainable tourism includes crossovers, for example, a rural environment rich in nature, history, and heritage. Another superior example in Manhattan is its unusual number of “natural settings” or parks which are an integral part of “sustainable tourism”. There is the City Park, Douglass Park, CiCo Park, Longs Park, Warner Park, Frank Anneberg Park, Northview Park, Goodnow Park, Linear Park and many other similar amenities that offer wonderful opportunities for recreation and leisure tourism.

Manhattan is the northern entrance to the Flint Hills and has an opportunity to team up with communities in both Riley and Chase counties to promote the area as a major sustainable tourism destination. The Center will be so constructed that from the upper deck of the museum, a visitor will have a panoramic view of the majestic Flint Hills. The Center’s exhibitions will include a wide range of artifacts related to the Flint Hills and other areas nearby to Manhattan.

A special opportunity for emphasis of the Center is the Konza Prairie site and The Kansas Tallgrass Prairie National Preserve. The Konza Prairie contains 8,616 acres of native tallgrass prairie and is located in the western section of the vast grassland known as the “corn belt” which features grasslands that once covered much of the center of the continent. Located in the Kansas Flint Hills, this tallgrass laboratory is just 10 miles from Manhattan and is used for ecological research and education. While the Konza Prairie is open to the public at specific times for hiking and study, it is not promoted as a tourist site. If it were better known, it would attract a certain special visitor interested in seeing and preserving this important resource. A necessary outcome of greater visitation to the Konza Prairie would mandate a more open policy towards its use and hours of availability. One suggested method to achieve this would be to designate it as a botanical garden, with appropriate safeguards to preserve the site’s integrity.

More widely known yet not strongly promoted as a sustainable tourism site is The Kansas

Tallgrass Prairie National Preserve (Preserve). The brochure describing the Preserve begins with: "Whether you are visiting from the next county, a distant state, or another country, you now have a prairie destination, rich in the unique history, culture, and ecology of the Great Plains..." At one time nearly 400,000 square miles of tallgrass prairie stretched from Ohio to the Rocky Mountains and from Canada to Texas. Less than four percent of that prairie remains today, much of it in the Flint Hills. The rolling Flint Hills, which look like giant grass-covered ocean swells and include the Preserve, is the first U.S. National Park dedicated to the tallgrass prairie and the people who lived on it. The Preserve has a rich ranching history, covers about 10,894 acres, and has several well kept historical buildings. The Preserve, once the hunting grounds for the Kansa and Osage Indians, contains hills and prairie streams that are home to a large variety of life. This incredible ecosystem hosts 400 species of plants, 150 kinds of birds, 29 types of reptiles and amphibians, and 39 species of mammals can be found on the Preserve. The prairie flora and fauna, along with the historic buildings, the cultural history of Native Americans, and the rich legacy of ranching are all preserved for present and future generations to enjoy.

Local Tourism Market

Annual out-of-town visitation to the Manhattan area is estimated at about 1.0 million. The market positioning of the Downtown Redevelopment District is designed to capture out-of-town visitors. Kansas State University, Fort Riley, and the clustering of tourism sites in central Kansas now serve as major attractions for visitors to the Manhattan area.

Tuttle Creek Lake is the Manhattan area's largest tourism attraction with a reported 2003 attendance of 605,290 visitors. The Park has estimated that 393,439 visitors are from out-of-town, of which 98,360 are from out-of-state. The Prairie Discovery and Visitors Center would be a complementary attraction for visitors to Tuttle Creek Park which represents a primary source of patronage for the Downtown Redevelopment District.

Kansas State University (KSU) athletic events are a major generator of visitors to the Manhattan area. Total 2004 season attendance for the seven Kansas State University football games was reported by the KSU Athletic Department at 338,883, translating into an average of 48,405 per game. Out-of-state residents accounted for 26,120 season tickets. Another 32,000 tickets were allocated and sold to visiting out-of-state teams. Therefore, an estimated 58,120 out-of-state visitors attended the seven Kansas State University football games during the 2004 season. During the 2003-04 season, total attendance was reported at 117,552 for men's basketball (16 games @ 7,347 per game) and 121,745 for women's basketball (13 games @ 9,365 per game). Out-of-town visitors accounted for an estimated 25 percent of total attendance. Spectators of athletic events are major consumers of food, beverage, and entertainment both

before and after games. Therefore, spectators of Kansas State University sporting events represent a primary source of patronage for the Downtown Redevelopment District and for the Center.

Manhattan hosts several conventions throughout the year. During 2003, an estimated 50,000 out-of-town visitors attended conventions in Manhattan, with 12,500 coming from beyond 100 miles and another 10,000 from out-of-state. The Center would provide an additional reason for the convention delegate to visit and to include his/her family members while attending a Manhattan-based convention. In brief, the Center would help attract "new" convention business. Another benefit the Center would provide convention planners is as a place for social events for the delegates. In essence, the Center would be a supplementary sales advantage to the area.

Fall 2004 enrollment at Kansas State University was reported at 23,151 students, of which 3,596 are from out-of-state. Family and friends that visit out-of-state students have been estimated at approximately 10,000 per year (2.5 visitors per year per out-of-state student). This estimate is conservative given the large number of events held by the university each year, including athletic events, fall and spring enrollments and commencements, KSU Family Day, KSU Open House, and various lectures and educational events. The KSU Alumni Association supports a current membership of nearly 37,000 and operates the 52,000 square foot KSU Alumni Center. The age of most parents of college students falls into the category most plausible to be interested in visiting the Center.

The City of Manhattan Parks & Recreation Department hosts several annual youth and adult athletic and recreational events, attracting 2,000 out-of-state participants each year. Private soccer, softball, baseball, golf, swimming and diving, gymnastics, track, football, triathlon, and wrestling clubs host events throughout the year that attract out-of-town participants. Annual youth and adult athletic and recreation programs attract an estimated 12,500 participants from beyond 100 miles, of which 5,000 are from out-of-state. These groups also would conceivably show interest in the Center.

Fort Riley is located in close proximity to Manhattan. This military installation houses approximately 11,000 soldiers and 12,000 family members. The vast majority of stationed soldiers and family members are out-of-state residents, generating an estimated 27,500 out-of-state visitors each year. Both these in-state residents and out-of-state visitors represent a market for the Center.

In December 2004 the Canyon Research Southwest, Inc. completed a major study titled: *STAR Bond Feasibility & Market Study* that details the data and reasons that the Center should qualify for STAR Bond funding. Much of the information on the tourism market for Manhattan included in this section is derived from that study. From other research utilized for this document, the information and estimates produced by the Canyon Study appear valid and

justified. In fact, if the State of Kansas continues to pursue a tourism policy and program to develop and promote the Flint Hills region as a major tourism destination and the Manhattan area acts on some of the recommendations outlined in the document, the Canyon Study numbers would appear to be very conservative. The Canyon Study, this document, national tourism trends, State of Kansas tourism information and Manhattan statistics strongly suggest the Center would add greatly to economic development and tourism sustainability in the Manhattan area.

The Manhattan area hosts an estimated 1.0 million out-of-town visitors per year. As summarized in Table 2, approximately 686,000 annual visitors to the Manhattan area travel from beyond 100 miles, of which an estimated 229,000 are out-of-state residents. These forecast out-of-town visitation patterns meet the State of Kansas Secretary of Commerce guidelines that 30 percent of visitors to a proposed STAR Bond Redevelopment District travel beyond 100 miles and 20 percent reside out-of-state.

TABLE 2.

Manhattan, Kansas Visitation Patterns

Attraction	Visitors from 100+ Miles	Out-of-State Visitors
Tuttle Creek Lake	393,439	98,360
KSU Football	227,800	58,120
Conventions	12,500	10,000
KSU Students – Family & Friends		10,000
Other KSU Programs`	30,000	20,000
Youth & Adult Athletics	12,500	5,000
Fort Riley – Family & Friends		27,500
TOTAL	676,239	228,980

Source: Canyon Research Southwest, Inc.

The multi-state region of Kansas, Missouri, Iowa, Nebraska, and Oklahoma is expected to be the source for most Manhattan area visitors. Table 3 (which follows) provides demographic data published by Claritas, Inc. for this 5-state region. The region's current population has been estimated at 16.7 million, with Kansas accounting for just 16.4 percent, or 2.7 million. From 2004 to 2009, the 5-state region's population is forecast to increase by 2.38 percent, reaching 17.1 million.

TABLE 3.

5-State Region Trade Area Demographics

	Kansas	Missouri	Iowa	Nebraska	Oklahoma	TOTAL
Population						
2004	2,731,719	5,729,634	2,948,982	1,746,803	3,526,503	16,683,641
2009	2,786,034	5,896,148	2,978,491	1,794,541	3,626,095	17,081,309
% Change	1.99%	2.91%	1.00%	2.73%	2.82%	2.38%
Population by Age						
21-24	147,680	288,314	156,478	94,263	192,411	879,146
25-34	348,853	738,733	363,060	223,273	451,647	2,125,566
35-44	420,351	887,569	445,199	263,834	523,522	2,540,475
45-54	354,147	742,462	392,794	225,754	453,761	2,168,918
Totals	1,271,031	2,657,078	1,357,531	807,124	1,621,341	7,714,105
% of Total	46.53%	4.37%	46.03%	46.21%	56.98%	46.24%
Average Household Income						
	\$58,295	\$55,670	\$54,968	\$55,655	\$49,822	\$54,738
% Households \$100,000+						
	12.54%	11.68%	10.36%	11.14%	9.20%	11.01%
Per Capita Income						
	\$22,912	\$22,221	\$22,067	\$22,039	\$19,754	\$21,766

Source: Claritas, Inc.

Age and income characteristics are most relevant when evaluating a potential destination's entertainment and retail center/district. Young, well-educated, and affluent people represent the primary target market for retailers of destination entertainment and retail centers/districts. This group would also represent the major market for the Center.

People aged 21 to 54 represent the primary customer for the Downtown Redevelopment District. This age group now accounts for approximately 46 percent of the 5-state population, or 7.7 million people. Income levels are consistent with the national average with 718,933 households, or approximately 11.0 percent of all households, possessing annual incomes of \$100,000 or more. The 5-state region's demographic characteristics bode well for the ability of the Downtown Redevelopment District to support destination entertainment and retail uses.

The 5-state region's large population outside of Kansas (14 million) is favorable for the potential to attract high volumes of out-of-state visitors to the Downtown Redevelopment District. As discussed earlier, approximately two-thirds of existing out-of-town visitors to the Manhattan area travel beyond 100 miles. Out-of-state visitors account for approximately 22 percent of existing out-of-town visitors to the Manhattan area.

Forecast and Budgets

STAR Bond financing is being sought to assist in the development of the Prairie Discovery and Visitors Center. To assist in evaluating STAR Bond applications, the Kansas Secretary of Commerce has published guidelines regarding a proposed project's economic impact. The following criteria will be evaluated when considering the tourism potential of a project applying for STAR Bond financing:

- ◆ Out-of-state visitation from multiple states should have a target of 20 percent of total annual visitation to be considered a major, unique destination attraction;
- ◆ A target of 30 percent of total annual visitation should be drawn from greater than 100 miles distance from the attraction community; and
- ◆ Total annual visitation should compare very favorable to existing attractions in Kansas.

Given the influence of Kansas State University and Fort Riley, existing visitation levels to the Manhattan area, activities of the Prairie Discovery and Visitors Center, and the concentration of destination entertainment and specialty retailers, the Downtown Redevelopment District will serve as one of central Kansas' primary destinations and draw visitors from a wide geographic area. The project's primary, secondary, and tertiary trade areas are roughly defined in the text below.

The primary trade area has been defined as the surrounding tri-county region of Riley, Clay, and Pottawatomie, which now hosts a population of 87,795. The 1.0 million annual visitors to the Manhattan area account for the secondary trade area. Out-of-town visitors are attracted to the area by Kansas State University, Fort Riley, and the area's tourist attractions. Finally, with the presence of the Prairie Discovery and Visitors Center as well as the unique mix of destination entertainment and specialty retail within the Downtown Redevelopment District, the project will serve as a multi-state destination. Therefore, the tertiary trade area will include the multi-state region of Kansas, Missouri, Iowa, Nebraska, and Oklahoma. According to Claritas, Inc., this 5-state region supports a current population of 16.7 million. From 2004 to 2009, the 5-state region's population is forecast to increase by 2.38 percent, reaching 17.1 million.

The Kansas Department of Commerce Travel & Tourism Division published the 2003 *Attraction Visitor Report* which tracks the attendance levels for major public and private attractions in the state. In 2003, attendance ranged from a low of 173 at the Minor Sod House Bed & Breakfast in Brewster, Kansas to a high of 1.42 million for Harrah's Prairie Band Casino in Mayetta, Kansas. One major attraction omitted from the survey is the Village West Tourism District (Kansas City, Kansas area with Cabela's, NASCAR race track, T-Bones baseball stadium, and other amenities), which attracts an estimated 7 million visitors per year. Therefore, at an estimated 120,000 to 380,000 visitors per year, the Downtown Redevelopment District would

become one of Kansas' leading attractions. A list of the most popular attractions in Kansas is provided in Table 4.

TABLE 4.

Major Kansas Attractions: 2003 Attendance

Attraction	Community	Reported Attendance
Harrah's Prairie Band Casino	Mayetta	1,422,000
El Dorado State Park	El Dorado	1,005,380
Hillsdale State Park	Paola	975,929
Topeka & Shawnee County Public Library	Topeka	913,466
Milford Lake & State Park	Junction City	771,459
Tuttle Creek State Park	Manhattan	605,290
Clinton State Park	Lawrence	594,065
Cheney State Park	Cheney	550,000
Kansas State Fairgrounds	Hutchinson	518,244
Sedgwick County Zoo	Wichita	490,937

Source: Kansas Department of Commerce

Together, the Prairie Discovery and Visitors Center and the Downtown Redevelopment District are capable of drawing from, and expanding on, the area's large existing visitor base. The Center is forecast to attract 60,000 to 100,000 annual visitors, translating into only 5 to 8 percent of forecast annual visitation to the area. By comparison, according to the *2003 Attraction Visitor Report* published by the Kansas Department of Commerce, similar attractions generally garnered likewise or much higher visitation. (See Table 5.)

TABLE 5.

Other Destination Venues in Kansas

Destination	Number of Visitors
U. S. Cavalry Museum – Ft. Riley	21,000
Riley County Museum – Manhattan	22,580
Beach Museum – Manhattan	26,848
Sunset Zoo – Manhattan	54,739
National Agricultural Center and Hall of Fame – Bonner	58,683
Great Plains Museum – Wichita	60,000
Sternberg Museum – Hays	74,972
Eisenhower Museum – Abilene	87,000
Boot Hill – Dodge City	90,182
Wichita, the Botanica Gardens – Wichita	106,188
Dillon Nature Center – Hutchinson	123,494
Kansas Historical Museum – Topeka	131,496
Great Plains Nature Center	148,306
KU Natural History Museum – Lawrence	196,200
Cosmosphere – Hutchinson	233,535
Exploration Place - Wichita	242,218

Source: Kansas Department of Commerce

These actual visitation levels, as well as existing visitation levels to the Manhattan area, suggest that the estimated 60,000 to 100,000 annual visitors to the Prairie Discovery and Visitors Center is realistically achievable.

The City of Manhattan has prepared estimates of Center revenues, personnel, an operating budget, and a project budget which are depicted in the following tables. These estimates are a good guide for the planning and operation of the Center.

TABLE 6.

Museum Revenues

Item	Minimum		Maximum	
Visitation Range (persons annually)	60,000		100,000	
\$7 Adults, \$5 Seniors, \$4 Children				
Admissions	\$ 300,000		\$ 500,000	
Annual Admission Pass	\$ 10,000		\$ 20,000	
Gift Shop Net Income	\$ 15,000		\$ 20,000	
Food Service Net Income	\$ 25,000		\$ 30,000	
Education Programs	\$ 50,000		\$ 60,000	
Special Events / Building Rental Income	\$ 50,000		\$ 75,000	
Prairie Tours	\$ 15,000		\$ 20,000	
Subtotal	\$ 465,000		\$ 725,000	
Corporate Grants	\$ 100,000		\$ 100,000	
Foundation Grants	\$ 50,000		\$ 100,000	
Friends of the Center	\$ 50,000		\$ 60,000	
City County State Funding (CVB Tax)	\$ 61,500	*1/2 cent inc.	\$ 246,000	*2 cent inc.
Subtotal	\$ 261,500		\$ 506,000	
TOTAL	\$ 726,500		\$ 1,231,000	

Source: City of Manhattan

*1 cent of CVB tax generates around \$123,000 annually.

TABLE 7.

**City of Manhattan
Discovery Center Personnel**

Classification	Full Time	Part Time
Museum Director/Curator	1	
Marketing / Development Staff	1	1
Education Assistant		2
Exhibit / Discovery Center Staff	2	2
Visitor Center Staff*	2	4
Discovery Center Store Attendants		2
Visitor Services Representatives		3
Maintenance Custodial Staff		4
TOTAL	8	10
Total Number Authorized		
Full Time	8	
Part Time		18
FTE	17	

Source: City of Manhattan

TABLE 8.

Operating Budget

Item			
Curator – 1 F/T position	\$	32,000	
Visitor Center Staff – 4 FTE*	\$	66,000	*1 FTE already exists on Chamber staff
Discovery Center Staff – 3 FTE	\$	66,000	
Education/Marketing/Development – 2.5 FTE	\$	55,000	
Discovery Center Attendants – 1 FTE	\$	18,000	
Visitor Center Representatives – 1.5 FTE	\$	26,000	
Maintenance/Custodial Staff – 4 FTE	\$	88,000	
Salaries/Benefits TOTAL			
	\$	351,000	
Utilities	\$	50,000	
Maintenance and Repair	\$	60,000	
Insurance	\$	32,000	
Contractual Services	\$	35,000	
Development Expenses	\$	15,500	
Interactive Theater Expenses	\$	15,000	
Exhibit Program Expenses	\$	35,000	
Education Program Expenses	\$	25,000	
Publicity and Advertising Expenses	\$	15,000	
Resale Items	\$	35,000	
Operating Budget TOTAL			
	\$	668,500	
Other Considerations			
Requirements of collection lending institutions			
University interns			
Docent / Volunteer Program			
Initial Capital Investments			
2 – 15 Passenger vans (TOURS)	\$	60,000	
Exhibits	\$	3,000,000	
Furniture, Fixtures, Equipment	\$	450,000	
Theatre Equipment	\$	300,000	
Service Vehicle	\$	25,000	
Hours of Operation (55 HR Week)			
Tuesday – Saturday		9:00 AM – 6:00 PM	
Sunday - Monday		12:00 PM – 5:00 PM	
*Visitor center hours could be expanded during peak times			

Source: City of Manhattan

TABLE 9.

Project Budget

Item	Unit Cost	Quantity	/Unit	Extended
The Permanent Exhibit/Tower	\$ 400	8,500	\$/SF	\$ 3,400,000
Visitor Center/Stratum	\$ 200	20,000	\$/SF	\$ 4,000,000
Activities Pavilion	\$ 175	5,830	\$/SF	\$ 1,020,250
Plaza	\$ 50	20,000	\$/SF	\$ 1,000,000
Site Development	\$ 200,000	8	\$/Acre	\$ 1,600,000
Parking	\$ 3,000	130	\$/Space	\$ 390,000
Architect/Engineer Fees			10.00%	\$ 641,025
Construction Manager Fees			3.50%	\$ 175,000
Theater Equipment			LS	\$ 300,000
Furniture/Fixtures & Equipment (FF&E)			LS	\$ 450,000
FF&E Design Fees			8%	\$ 36,000
Exhibit Fabrication	\$ 500	6,000	\$/SF	\$ 3,000,000
Exhibit Design Fees			25%	\$ 750,000
Special Consultants (Lighting, Acoustics, A/V, IS)			LS	\$ 100,000
Subtotal				\$ 16,862,275
Contingency			10%	\$ 1,686,227.50
Land Purchases			LS	
Start-up Expenses			LS	
Fund Raising Expenses			LS	
Subtotal				\$ 1,686,227.50
Project Budget TOTAL				\$ 18,548,502.50
<u>Other Considerations</u>				
Design Competition				
Public Review				
Historic Preservation				
Environmental				
Requirements of Collection Lending Institutions				

Source: City of Manhattan

Economic Impact

The Center will become an important generator of economic development for Manhattan and the surrounding area. It is extremely difficult to make estimates of the economic impact of the Center because of the great number of factors that need to be taken into consideration. The Canyon Study provides a rationale that includes an average visitor spending of \$50 per day, arriving at an estimate for increased revenues attributable to the Center of between \$63 to \$73 million.

Using these estimates and information from Travel Industry Association of America (which produces state by state estimates of tourism expenditures and employment) the Center would produce approximately 900 to 1,000 jobs throughout the region. These very rough estimates are extremely conservative in that they do not include:

- ◆ the “multiplier effect” of tourism dollar expenditures (variously estimated at somewhere between about 1.5 and 2.0);
- ◆ part-time employment that might result from “induced jobs” based on expenditures; and
- ◆ jobs that would be created in areas outside of Manhattan and Riley County.

They also do not include new industries, new investments, new businesses (notably small businesses), and other economic development that would evolve as off-shoots of the Center. For example, it is feasible that a new 100 room hotel would be built to accommodate the increase in the number of visitors. A full service hotel with 100 rooms would support an additional 50-75 employees, depending on services proffered. It is clear that the Center would have a major economic impact; the unanswered question is how many jobs beyond the 900 to 1,000 would be created.

SWOT Analysis

In most tourism strategic planning documents it is common to include a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats). This report on the Center takes a little different approach. Instead, it presents an OSWT analysis by presenting opportunities first, followed by strengths, weaknesses, and threats. This analysis is based on readily available data and research and is by no means all inclusive.

OSWT Analysis

Opportunities

- ◆ Develop the Center, a new dynamic tourism product
- ◆ Integrate the Center within a larger development project in Manhattan
- ◆ Exploit trends and growth interest in history, heritage, and culture tourism
- ◆ Partner with tourism-interested entities within and nearby to Riley County
- ◆ Target new market segments interested in the Center's offerings
- ◆ Use e-Commerce tools and information technology to strengthen marketing
- ◆ Increase tourism sustainability, including economic growth and environmental integrity

Strengths

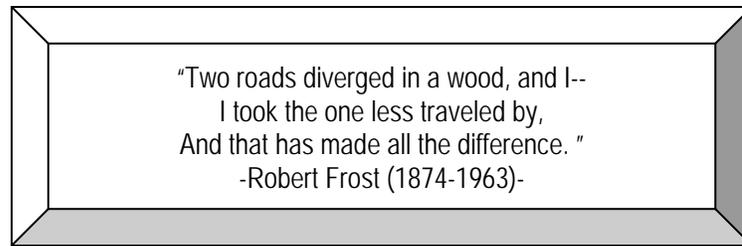
- ◆ Safe and secure destination
- ◆ Good local leadership interested in quality growth opportunities for Manhattan
- ◆ A solid infrastructure
- ◆ The State of Kansas recognizes that the Flint Hills region offers tourism potential
- ◆ Diverse geography, history, heritage, culture, and natural environment
- ◆ Center creates wonderful, unique, and diverse visitor experiences
- ◆ Friendly local people

Weakness

- ◆ No current funding for Center's development
- ◆ Lack of a solid state tourism budget
- ◆ Seasonality impacts most tourism products in the area

Threats

- ◆ Competition from other destinations
- ◆ Motor fuel costs have risen 59 percent since 1999 and might continue to rise
- ◆ Some community members may simply want the area left as it is



OUTSIDE OPPORTUNITIES AND STAKEHOLDERS

A Special Federal Opportunity

With the signing of Executive Order 13287 in March of 2003, President George Bush established the Preserve America initiative. The order, recognizing the importance of heritage tourism, encourages and supports community efforts to preserve cultural and natural heritage assets. The program's goals are fourfold.

1. A greater shared knowledge about the nation's past.
2. Strengthened regional identities and local pride.
3. Increased local participation in preserving the country's cultural and natural heritage assets.
4. Support for the economic vitality of our communities.

Resulting from this order, the U.S. Secretary of Commerce is directed to help develop local and regional heritage tourism programs. The program provides grant money to assist communities achieve program objectives. The 2005 application deadlines are March 1, June 1, September 1, and December 1. It would appear, based on the above criteria, that the Center might be a qualifying project.

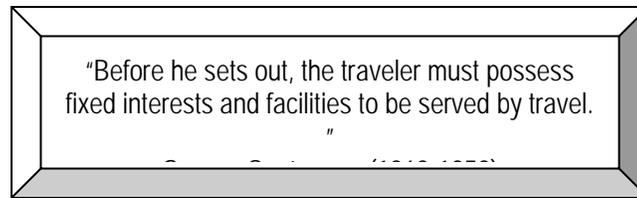
Other Preservation Organizations, Services, and Grant Programs

It is possible that the Center may qualify for other grant programs such as some of the following:

- ◆ American Institute for Conservation of Historic Artistic Works
- ◆ Heritage Preservation Services
- ◆ National Historic Landmarks Assistance Initiative
- ◆ The League of Historic American Theatres
- ◆ National Trust for Historic Preservation

Other opportunities for partnership arrangements identified by the Manhattan Attractions Committee include:

- ◆ Smithsonian's Natural Museum of Natural History: "Listening to the Prairie"
- ◆ Konza Prairie Biological Station
- ◆ Designation as a Smithsonian Affiliate Museum
- ◆ Nature Conservancy
- ◆ National Park Service
- ◆ National Geographic Society
- ◆ National Aeronautics and Space Administration
- ◆ U.S. Department of Agriculture
- ◆ Kansas Department of Travel and Tourism
- ◆ Kansas Department of Wildlife and Parks
- ◆ Kansas State University
- ◆ Sunset Zoological Park
- ◆ Riley County Historical Museum
- ◆ State of Kansas
- ◆ Private companies, foundations, Native American connections
- ◆ Other local and county patron groups



RECOMMENDATIONS

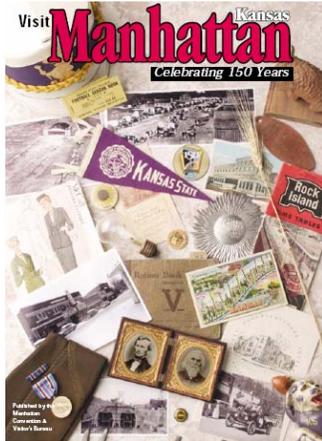
The following are a few recommendations to further stimulate additional interest, with respect to the Center. In some cases, these recommendations include more detailed explanations of previously mentioned tourism information in this document while in other cases, they are a simple listing of activities that warrant some attention. A few may be controversial but need to be considered if a comprehensive appraisal of the Center is to be meaningful.

- ◆ This report on the Center confirms and expands on the results of the Canyon Research Southwest, Inc. "STAR Bond Feasibility and Market Study" and the Manhattan Attractions Committee reports. This document, along with the study and reports mentioned above, should accompany a letter from the Manhattan City Manager's office to the Kansas Secretary of Commerce requesting Center financing from the State's STAR Bond program.
- ◆ Until the Center is completed, the stakeholders should meet regularly (preferably quarterly, but at least semi-annually) to review any new research, data, or opportunities that might arise. The Attractions Committee should make continuous recommendations as the project progresses. The community and media need to be apprised whenever changes are anticipated or new information becomes available.
- ◆ The OSWT analysis should be reviewed at least every six months to determine if changes have taken place. Some of the likely changes may take place outside the Manhattan area. For example, the State of Kansas may change its tourism policies, direction, and emphasis. New tourism products in Riley County or in the nearby region may emerge and need to be included in the Center's analysis.
- ◆ Develop a vision, mission statement, goals, objectives, strategies, and tactics for the Center that chart a course of action and direction for the project. They should be dynamic, sustainable, and in tune with visitor trends and overall community development. Local community involvement or representation can help shape this process. For illustrative purposes only and to stimulate interest, the following gives one suggested set of a vision, mission statement, some representative (not

- conclusive) goals, objectives, strategies and tactics.
- Vision: To be recognized as the national representation of a Prairie attraction.
 - Mission: Foster awareness and passion for the power and beauty of nature within the Prairie and the Flint Hills.
 - Goals: Showcase for sustainability; bridge to area and regional attractions; educational interaction; multi-sensory; tourism attraction enhancing and enlarging Manhattan as a destination.
 - Objectives: The Center should be a catalyst for other development; create local pride in the community; increase local, regional, state, national and international destination visitors.
 - Strategies: Seek short-term and long-range financing; integrate Center with other community plans and projects; engage partners in the project; begin promotional strategies; involve the State of Kansas as early as possible.
 - Tactics: Continue awareness and education about the Center; develop immediate contacts with potential partners (be farsighted with contacts that might range from a Cabela's to auto manufactures; from a Smithsonian to the World Tourism Organization); work closely with all the State agencies concerned (Commerce, Wildlife and Parks, Transportation, etc.); begin planning for marketing and promoting the Center.
- ◆ In a project such as this, sometimes, there is a tendency to ignore what is taking place outside the immediate area. As the Center progresses, more of the stakeholders located outside of the immediate area need to become more involved. Transportation, for example, is a key to the success of the project. Any changes in highway construction, signage, or access to the area should be carefully evaluated.
 - ◆ The Center needs to be cognizant of a need to naturally blend in with the area and community. As the community sees the positive aspects of the project they will more likely embrace it, take pride in being a part of the development, and will want to share it with visitors. A quality product will promote itself, but a friendly community environment will increase repeat business and promote new visitation.
 - ◆ Like other communities, associations, and organizations in Kansas, Manhattan should lobby the state government and the state legislature to increase the State's tourism budget. The Travel Industry Association of America report: 2004-2005 Survey of U.S. State and Territory Tourism Office Budgets (April 2005) shows Kansas in 40th place in the table on state tourism budgets. Obviously, the Center will be more successful in attracting visitors if, at the same time, more visitors are coming to Kansas.

APPENDICES

SELECTED IMPORTANT TOURISM RELATED INFORMATION



For questions - contact the Manhattan Convention and Visitors Bureau

Email: cvb@manhattan.org

Call: toll free at 1-800-759-0134

Web site: www.manhattancvb.org



- Staff
- Division Program List
- Documents & Presentations
- Getaway Guide & Map
- Bulk Orders
- TravelKS.com
- Commerce Homepage
- *Kansas!* Magazine Homepage

www.travelks.com

Kansas Department of Commerce
Travel & Tourism Division
1000 S.W. Jackson Street, Suite 100
Topeka, Kansas 66612-1354
Phone: (785) 296-2009
Fax: (785) 296-6988
TTY (Hearing Impaired): (785) 296-3487

TOURISM ORGANIZATIONS AND ALLIANCES

TOURISM RELATED ORGANIZATIONS IN KANSAS:

Statewide Tourism Organizations and Alliances

Governor's Council on Tourism
 Kansas Agritourism Advisory Council
 Kansas Association of RV Parks and Campgrounds (KARVC)
 Kansas Bed & Breakfast Alliance (KBBA)
 Kansas Bowhunting Association
 Kansas Cattle Towns Coalition
 Kansas Golf Association
 Kansas Motorcoach Marketing Alliance (KMMA)
 Kansas Museums Association (KMA)
 Kansas Nature-Based Tourism Alliance (KNBTA)
 Kansas Outdoors
 Kansas Outfitter's Association (KOA)
 Kansas Restaurant and Hospitality Alliance (KRHA)
 Kansas RV Parks and Travel Inc. (KAN-RVT)
 Kansas Sampler Foundation
 Kansas Sport Hunting Association (KSHA)
 Kansas State Historical Society (KSHS)
 Kansas Women's Golf Association
 Tourism Arts Alliance of Kansas (TAAK)
 Tourism Industry Association of Kansas (TIAK)

Regional Alliances

Amazing 100 Miles Coalition
 Bleeding Kansas National Heritage Area (proposed)
 Kansas Adventure Times III
 Kansas Historic Route 66 Association
 Kansas Historic Theatres Association
 Kansas I-35 Tourism Coalition
 Kansas I-70 Association
 Kansas Scenic Byways
 Kansas Trails Association
 Medicine Lodge Peace Treaty Association
 North Central Kansas Tourism Region
 Northwest Kansas Travel Council
 Oregon-California Trail Association
 Prairie People Tourism Association
 Solomon Valley - Highway 24 Heritage Alliance
 South Central Kansas Tourism Region
 Southeast Kansas Tourism Region
 Territorial Kansas Heritage Alliance
 Try Southwest Kansas
 Wild West Country, Inc.
 Wild West Kansas

State Offices

Kansas Department of Commerce: Agricultural Products Marketing Division
 Kansas Department of Commerce: Community Development Division
 Kansas Department of Commerce: Business Development
 Kansas Department of Commerce: Trade Division
 Kansas Department of Health and Environment

Kansas Department of Revenue
Kansas Secretary of State
Kansas Department of Transportation (KDOT)
Kansas Department of Wildlife and Parks (KDW&P)

Other Partners

Association of Community Arts Agencies of Kansas (ACAAK)
Kansas Arts Commission (KAC)
Kansas Associations of Counties
Kansas Chamber of Commerce and Industry
Kansas Humanities Council
Kansas on the Net, LLC
Kansas Originals
Kansas Preservation Alliance
Kansas Resource Conservation & Development Areas
Kansas Small Business Development Center
National Park Service

Agriculture/Agritourism Specific Organizations

Frontier Farm Credit
Kansas Ag Bankers Association
Kansas Association for Conservation & Environmental Education (KACEE)
Kansas Association of County Agricultural Agents
Kansas Buffalo Association
Kansas Christmas Tree Growers Association
Kansas Electric Cooperative, Inc.
Kansas Farm Bureau
Kansas Fruit Growers Association
Kansas Horse Council
Kansas Livestock Association
Kansas Rural Center
Kansas State University Research & Extension
Kansas Vegetable Growers Association
Kansas Winemakers and Grape Growers Association

Other Important Tourism Related Organizations

World Tourism Organization - Madrid, Spain
World Travel and Tourism Council - London, England
Organization for Economic Cooperation and Development - Paris, France
Office of Travel and Tourism Industries - Washington, D.C.
Travel Industry Association of America - Washington, D.C.
American Automobile Association (AAA National) - Heathrow, Florida
American Bus Association - Washington, D.C.
American Hotel and Lodging Association - Washington, D.C.
Amtrak (National Railroad Passenger Corporation) - U.S. Department of Transportation
Council on Hotel, Restaurant, and Institutional Education - Richmond, Virginia
International Association of Convention and Visitor Bureaus - Washington, D.C.
International Academy for the Study of Tourism - Hong Kong
National Recreation and Park Association - Ashburn, Virginia
National Tour Association - Lexington, Kentucky
Recreation Vehicle Industry Association - Reston, Virginia
Society of American Travel Writers - Raleigh, North Carolina
United States Tour Operators Association - New York, New York

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SPECIAL REFERENCES:

In addition to the general references cited above, the research for this Strategic Focus also relied heavily on numerous unpublished documents and discussions with tourism experts and contractors. A few are noted below:

Suzanne Barnes, Manager, Grand Central Hotel, Cottonwood Falls

Becky Blake, State of Kansas Tourism Director and formerly Executive Vice President-Director, Manhattan Convention and Visitors Bureau

Lyle Butler, President/CEO, Manhattan Area Chamber of Commerce

Callahan Creek staff - Research, marketing strategies

Louisa M. Carlin, Project Director, The Tallgrass Prairie National Preserve

Jane Eckert, Eckert Agrimarketing

Ted Lee Eubanks, Jr., President, FERMATA, Inc., Flint Hills project

Ron Fehr, City Manager, City of Manhattan

Jason Hilgers, Assistant to the City Manager/Redevelopment Coordinator, City of Manhattan

Beverly Hurley, Travel Media Relations

Kansas Department of Wildlife and Parks staff

Kansas Getaway Guide staff

KANSAS! magazine staff

Kansas Travel and Tourism Development Division staff

Midwest Living magazine staff

Mary Jeanne Packer, CEO, FERMATA, Inc.

Belinda Pottorff, National Account Manager, USA 800

Kurt Ruf, Ruf Strategic Solutions - Research and database marketing

Bob Welstead, Dial Realty Corp, Omaha, Nebraska

Lisa Wright, International Marketing and Public Relations Representative

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Maria DelMastro Allen, researcher and Assistant to the Director, Institute for Tourism, East Carolina University, Greenville, North Carolina.

Sarah J. Gust, Travel Director - Events and Meetings, Greenville, North Carolina.

BIOGRAPHICAL SKETCH OF DAVID L. EDGELL, SR., PhD

Dr. David L. Edgell, Sr. is a Professor and the Director of the Institute for Tourism at East Carolina University, Greenville, North Carolina.

Dave Edgell grew up in a family in Leavenworth, Kansas that stressed the core values of determination, honesty, self-reliance, integrity, and hard work - which have been an integral part of his adult life. Even though he was a star athlete in high school football, basketball, and track and field, he saw early on that education was the way to better himself and he became as much a scholar as he was an athlete.



Shortly after graduating from the University of Kansas with a Bachelor of Science degree in Business, he left Kansas for a labor economist position in Washington, DC. As he moved forward in his career, he also continued his education, eventually earning a second bachelor's degree in economics, a master's degree in public administration, and a doctor of philosophy in management. During the evening, after a full day in his office, he taught graduate courses in business and tourism as an adjunct professor at The George Washington University's School of Business. He received a special award from the University as a "world tourism leader". He is also an adjunct professor, University of Hawai'i, Executive Development Institute for Tourism and an adjunct graduate tourism professor at the Universitat de les Illes Balears (Spain).

In Washington, DC, as an employee of the U.S. Department of Commerce, he was one of the architects of the National Tourism Policy Act of 1981, which established the United States Travel and Tourism Administration, the National Tourism Policy Council, and the U.S. Travel and Tourism Advisory Board. For several years he led efforts by the U.S. Government to increase international tourism to the United States as the Senior Executive Director of the U.S. Travel and Tourism Administration in the U.S. Department of Commerce. He was the sole recipient to ever receive all three of the Department's highest medal awards, the Bronze, the Silver, and the Gold, for his leadership in trade, tourism, and economic development.

In 1993 and 1994, he served as Acting Under Secretary of Commerce for Travel and Tourism with an office in Washington, DC, and eight international offices. In 1995, he was nominated by the Governor of the U.S. Virgin Islands and approved by the Senate as the first ever Commissioner of Tourism for the U.S. Virgin Islands. Beginning in 1997 and into 2001, he was Vice President for Strategic Marketing in the Kansas City marketing firm of MMG Worldwide, a firm that markets only for clients in tourism, travel, and hospitality. In 2002, he was named Director of the new Center for Tourism, Travel and Hospitality at the University of Missouri-Kansas City. In July 2003, he accepted the position as tenured professor and Director of the Institute for Tourism at East Carolina University in Greenville, North Carolina.

Dr. Edgell is also an author, speaker, and consultant, having written eight books and over 100 articles on tourism, trade, and economic development, made presentations, and handled consulting assignments in numerous states, territories, and foreign countries. In 2005, he wrote the book *Managing Sustainable Tourism: A Legacy for the Future*, a contemporary oriented critique of the importance that “sustainable tourism” plays as the driving force for quality tourism programs. He has considerable knowledge and experience on tourism policy, strategic planning, marketing, sustainable development, and education and training activities.

His website is www.davidedgell.com .