

JACKSON HOLE TRAVEL AND TOURISM BOARD

ANNUAL REPORT FISCAL YEAR 2017 | JULY 1, 2016 — JUNE 30, 2017

We've made memories, bonds and a community here. We've created something that can't be broken by anything or found anywhere else, and that's something worth protecting. But being good stewards of our home doesn't mean boxing out the rest of the world from the beauty and magic of Jackson. It means sharing Jackson with people who can appreciate all we have to offer. It's our responsibility to give others the opportunity to experience our town while making sure Jackson stays wild.



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A MESSAGE FROM OUR CHAIRMAN

Welcome to the second annual report presented by the Jackson Hole Travel & Tourism Board. This year’s report has been expanded to reflect the impact of the entire lodging tax collections, not just those used for promotion. Forty percent of the funds collected revert to the town and county, (30% visitor impact, 10% general fund) and are critical to managing and mitigating visitor impact from the tourism economy. Teton County had another positive year in the collection of not only lodging tax but sales tax too, reflecting the impact of tourism on our local economy.

Many communities throughout Wyoming have suffered significant budget cuts due to reduced revenue from mineral rights and a heavily reduced state budget. Teton County, however, fared well because tourism is our main economic driver, and as this report indicates, tourism remains strong in Teton County. Without the lodging tax, the town and county budgets would lose approximately \$2.5 million that helps fund transit, pathways, emergency services and other services.

Roughly 20% of the Jackson Hole Travel & Tourism promotional budget supports events in our community that not only enhance the community character and complement our brand, but also attract visitors to our destination. The events are broken into categories from youth sports, which supports local hockey, lacrosse, soccer, basketball, skiing and snowboarding, to legacy events, which includes the Cutter Races, skijoring and the Snow King Hill Climb, unique to our mountain town. The JHTTB is the founding sponsor of SHIFT, which celebrates our community’s conservation heritage and focuses on the intersection of conservation and recreation, two tightly held values of our community.

Throughout the years, the JHTTB has created assets and hosted free workshops for the community to learn, use and leverage for their own marketing needs. Most recently, the JHTTB created a photo-share library by Libris. In this library, we have created and aggregated photography from around the valley that is free to anyone in the community to access and use. This photo-share opportunity saves community organizations and businesses thousands of dollars in marketing expenses.

This report outlines the expenditures of all entities that manage the lodging tax and illustrates the growth in revenue over the years due to increased visitation to Teton County resulting from a strong U.S. economy, low gas prices and promotional efforts of not only the Jackson Hole Travel & Tourism board but the Wyoming Office of Tourism and Brand USA. This growth in tourism fuels our economy. The Jackson Hole Travel & Tourism Board’s vision is to be a world leader in responsible tourism. To that end, we are committed to making sure that the promotion and event funding for this place we all call home enhances the well-being of our community in a manner consistent with all our shared values.



Regards,
Alex Klein, *Chairman of the Jackson Hole Travel & Tourism Board*

TRAVEL & TOURISM AT WORK FOR TETON COUNTY



In 2016, Teton County welcomed **1,664,000** overnight visitors to the area.

Domestic and international travelers spent \$1.02 billion in Teton County and generated \$54.8 million in state and local taxes. This tax revenue is used to support public infrastructure like streets and roads, fire and police protection, and many other public services in Teton County.

Visitors paid **57.1% of the sales tax** in Teton County.



If not for the taxes generated by the travel and tourism industry, the average household in Teton County would have had to pay **\$5,785** more in taxes for existing government services.

*THESE EMPLOYMENT NUMBERS REPRESENT 2015 DATA. AT THE TIME OF THIS REPORT, 2016 DATA FOR THESE FIGURES WAS NOT AVAILABLE.

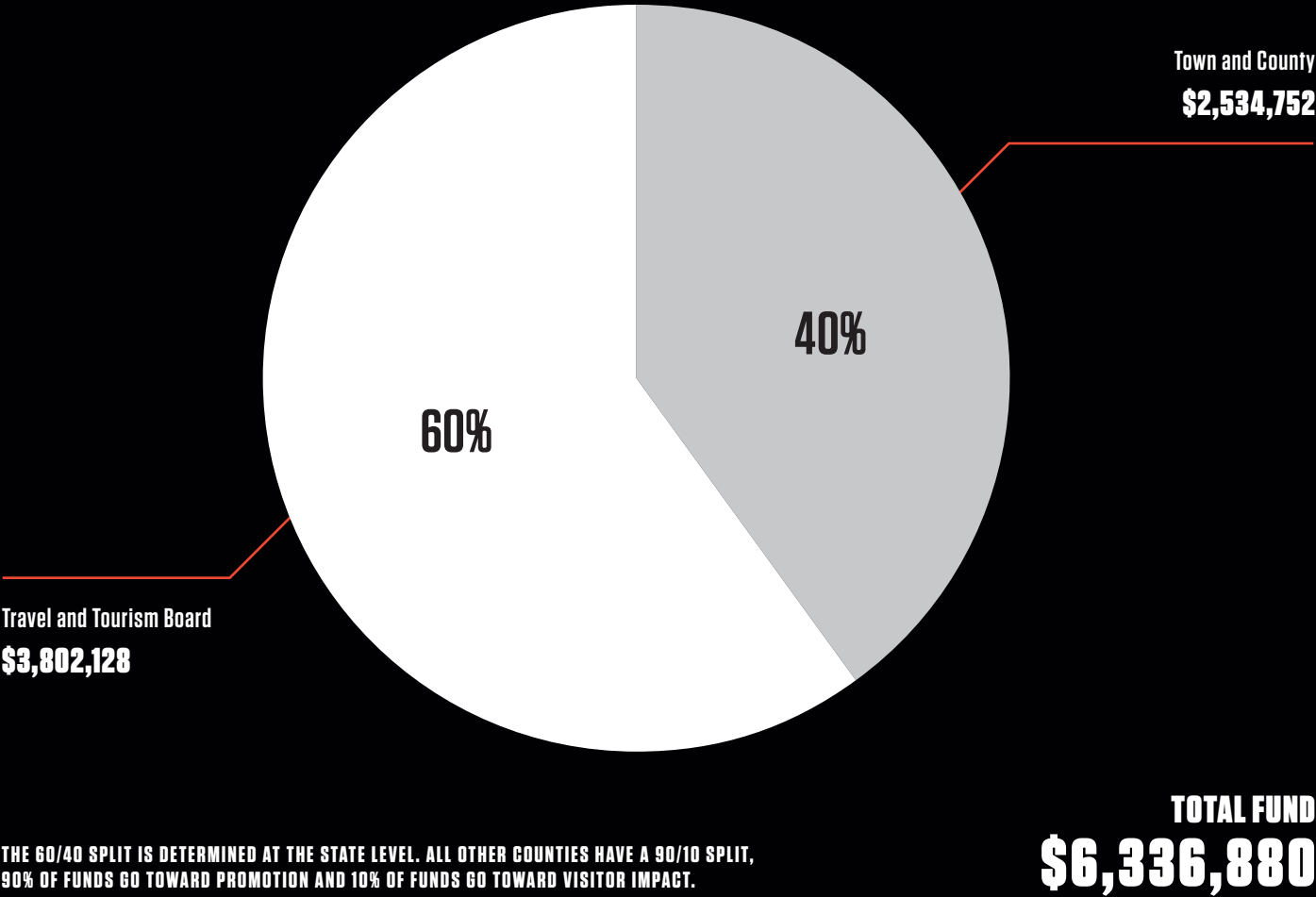


In 2016, travelers generated **8,250 jobs** in Teton County.

Travelers supported 25.9% of Teton County’s total private industry employment. Without the jobs generated by the travel industry, the 2015 Teton County unemployment rate of 3.8% would have been **29.7%.***

SOURCES: DEAN RUNYAN ASSOCIATES, TRAVEL IMPACT REPORT, APRIL 2017; U.S. BUREAU OF ECONOMIC ANALYSIS; U.S. BUREAU OF LABOR STATISTICS; WYOMING DEPT. OF REVENUE; WYOMING DEPT. OF A&I, DIVISION OF ECONOMIC ANALYSIS.

The lodging tax is a 2% tax that is added to a visitor’s stay in any Teton County hotel, motel or rental property. It was voted in by residents of Teton County in November 2010. Dubbed the “tax you don’t pay,” this money is collected from tourists visiting the valley. The Jackson Hole Travel & Tourism Joint Powers Board is responsible for allocating 60% of the collected funds. Teton County and the town government are responsible for allocating the remaining 40% of funds collected.



WHAT TOURISM MEANS FOR US

FOR OUR COUNTY

PUBLIC SAFETY

This year, almost 20% of the funds expended by the town and county supported the operations of Jackson Hole fire/EMS.

PARKS AND PATHWAYS

Over 40% of the funds expended by the town and county are invested back into our parks and pathways. This funding helps keep parks clean, restrooms maintained, trash cans empty, and pathways and sidewalks clear. In addition, wayfinding and repairs for our pathways ensure an excellent system for both recreation and transportation.

TRANSPORTATION

Transportation options are critical as both the community and tourism continue to grow. Approximately 30% of the funds expended by the town and county support the operations of the Southern Teton Area Rapid Transit (START) system and bus transportation to Grand Targhee.

HISTORICAL SOCIETY

Approximately 10% of the funds expended by the town and county support the operations of the Historical Society and Museum, which collects, preserves and explores the region’s rich history and creates unique educational programs to preserve and promote the unique character of Jackson Hole.

VISITOR SERVICES

A small percentage of the funds expended by the town and county support the main visitor center, as well as a partnership with the Wyoming Council for International Visitors.

FOR OUR TOWN

TRANSPORTATION

In FY 2017, roughly 40% of the income received by the town of Jackson through the lodging tax was used to fund the START system. START provides reliable transportation services to our commuters and mitigates tourist traffic by providing easy transportation options. By partnering with Friends of Pathways, we’ve also expanded transportation services to now include a bike share program.

PARKS AND PATHWAYS

In FY 2017, approximately \$300,000 of the income received by the town of Jackson through the lodging tax was used to maintain or improve Jackson/Teton County parks and pathways. Our parks and pathways provide enjoyable recreation for visitors and tourists alike while preserving the natural landscape in a responsible way.

PUBLIC SAFETY

\$230,231 of the income received by the town of Jackson through the lodging tax in FY 2017 was allocated to this non-restricted fund. Money from this account was utilized to fund the general operations of several town departments, including but not limited to the Jackson Police Department, the Jackson Hole Fire/EMS Department, the town of Jackson Victim Services Department and the town of Jackson. The benefit of a non-restricted allocation of funds is the ability for financial discretion, especially as unforeseen events occur or unplanned needs arise.



SOUTHERN TETON AREA RAPID TRANSIT (START)



HISTORICAL SOCIETY



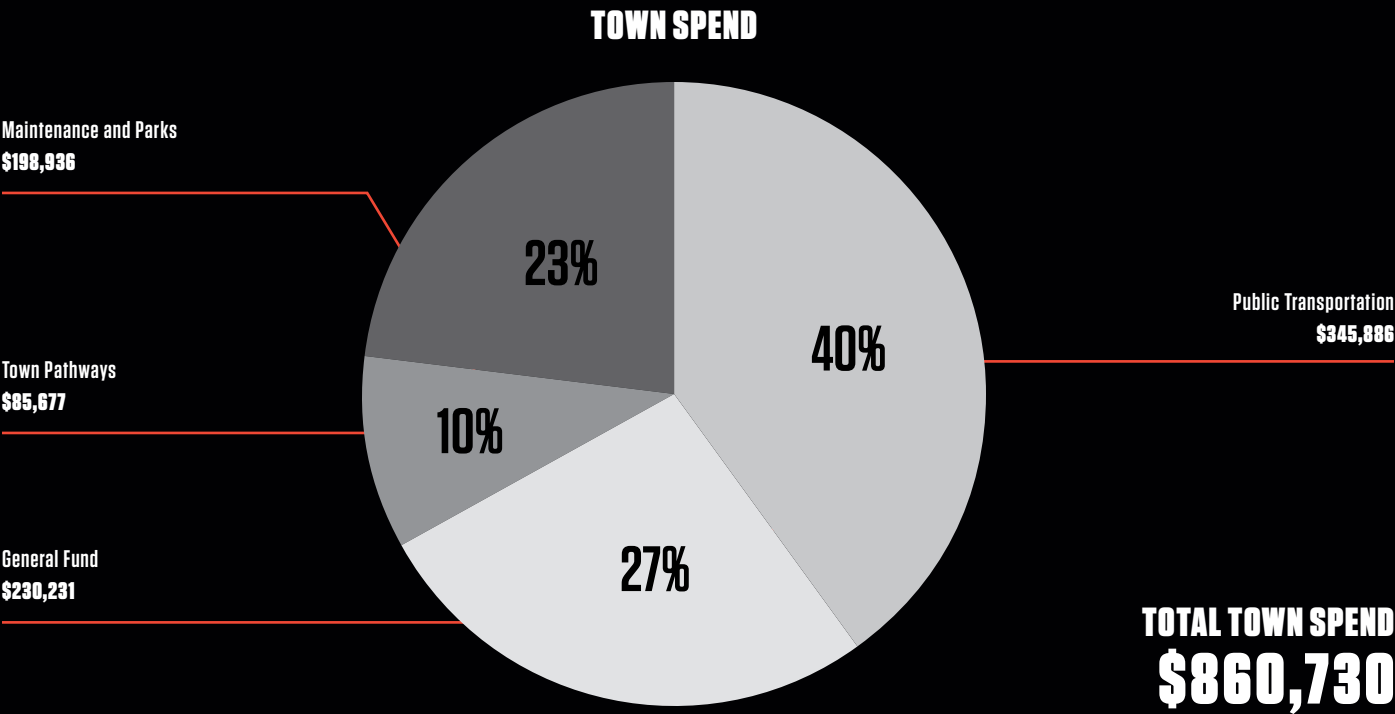
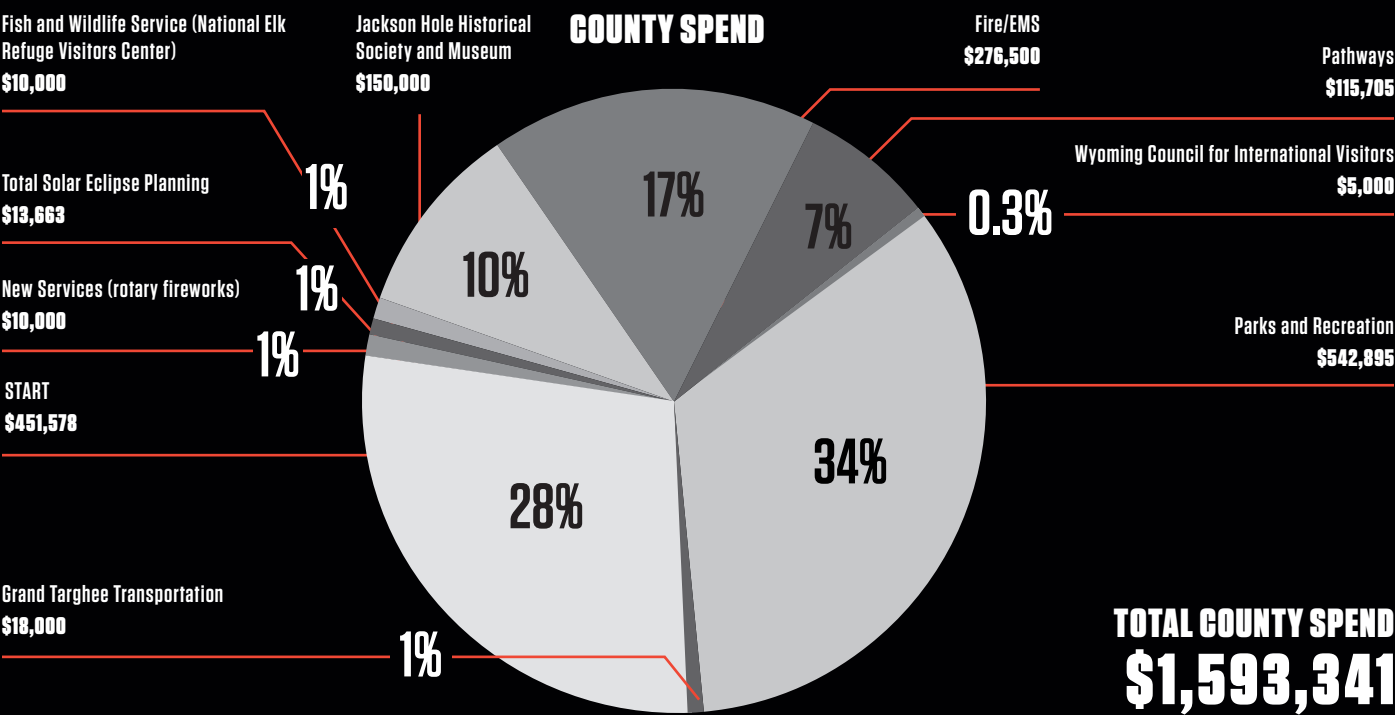
PARKS AND PATHWAYS

Teton County and the town of Jackson are responsible for 40% of the funds collected annually from the countywide 2% lodging tax.

The town and county split this 40% based upon point of sale. The town’s portion of this income is then split into a restricted fund (75%) and a general fund (25%).

The revenue from the lodging tax is used primarily to address the impact that millions of visitors have each year on our community, but it’s additionally used to reinvest back into Teton County. These funds help build a sustainable economic force and high quality of life for our residents.

COUNTY & TOWN SPENDING



JACKSON HOLE TRAVEL & TOURISM BOARD MEMBERS FY 2017

ALEX KLEIN
 Joined the Board in 2014
 Chairman
 General Manager
 Grand Teton Lodge Company

KEELY HERRON
 Joined the Board in 2015
 Vice-Chair
 Founder
 Wonderland Marketing

MIKE HALPIN
 Joined the Board in 2013
 Treasurer
 President, Meridian Group

BRIAN MODENA
 Joined the Board in 2016
 President, Secretary
 TMBR Creative Agency

STEPHEN PRICE
 Joined the Board in 2011
 Partner
 Spring Creek Ranch

AARON PRUZAN
 Joined the Board in 2011
 Owner
 Rendezvous River Sports

BRIAN GALLAGHER
 Joined the Board in 2016
 Director
 CityPASS

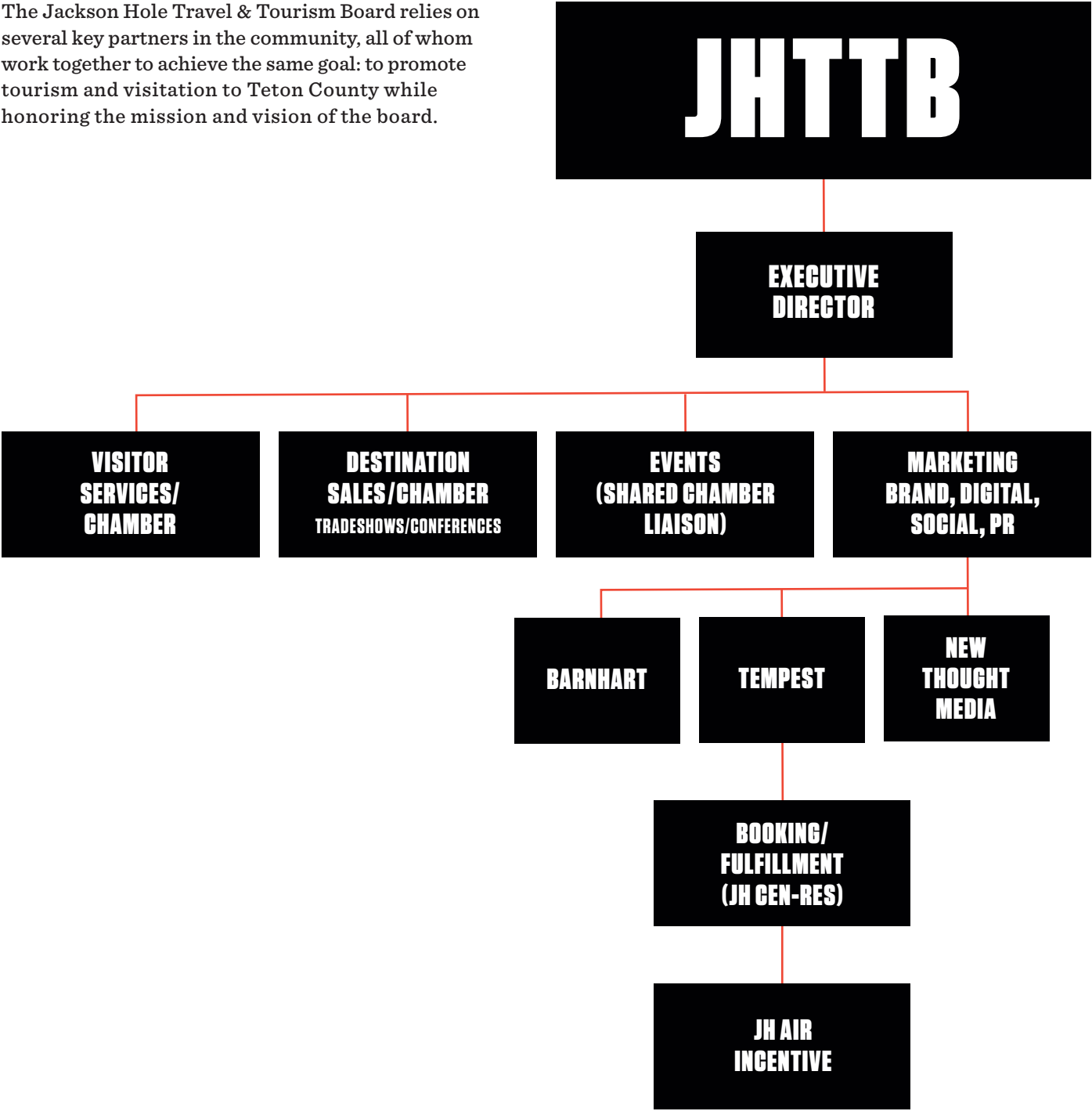
KATE SOLLITT
 Joined the Board in 2013
 Executive Director
 JHTTB

MAUREEN MURPHY
 Event Liaison
 Jackson Hole Chamber
 of Commerce

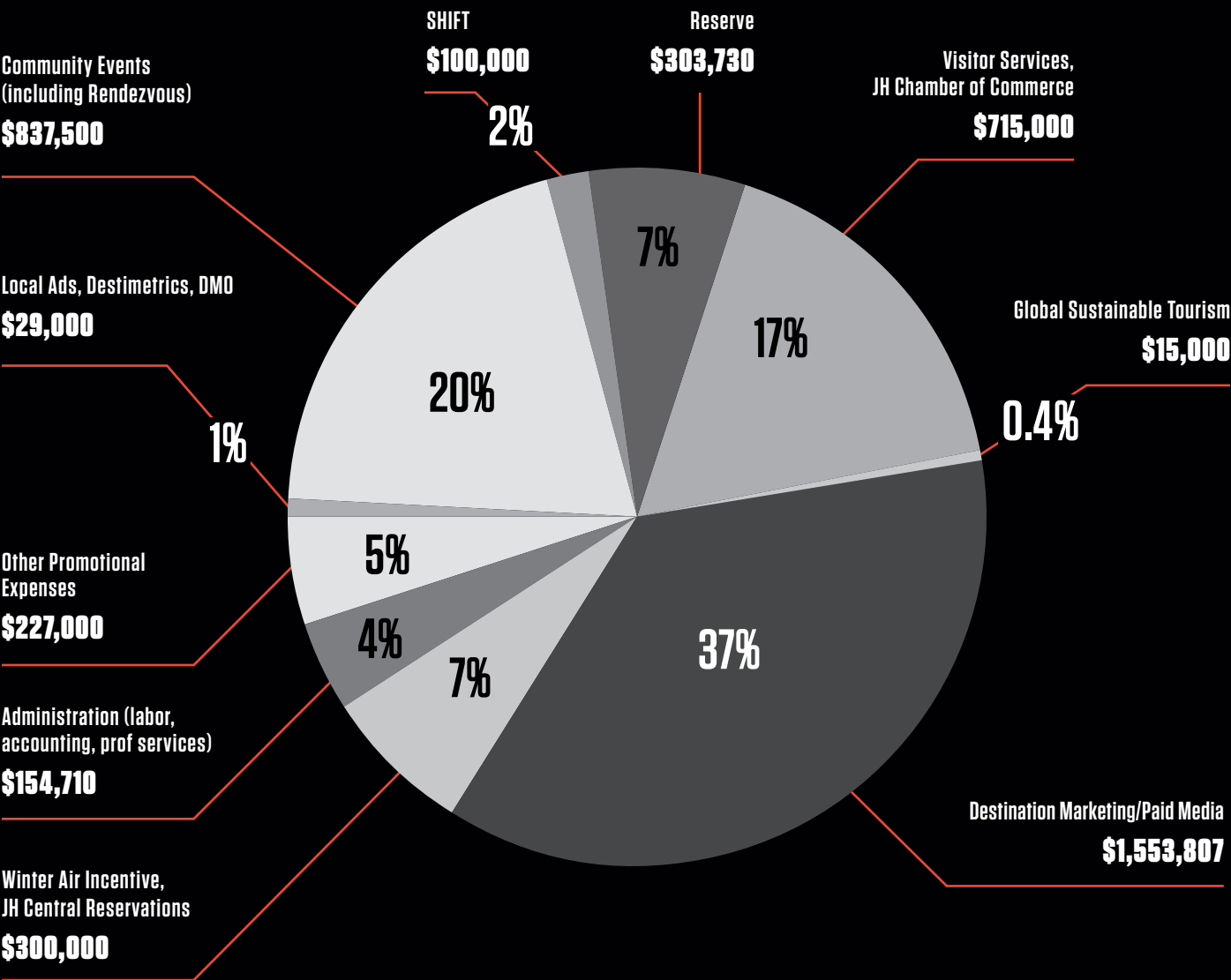
PARTNER ORGANIZATIONS
 Jackson Hole Chamber
 of Commerce
 Jackson Hole Central
 Reservations
 Jackson Hole Air

JHTTB PARTNERS

The Jackson Hole Travel & Tourism Board relies on several key partners in the community, all of whom work together to achieve the same goal: to promote tourism and visitation to Teton County while honoring the mission and vision of the board.



FY 2017 JHTTB
BUDGET BREAKDOWN

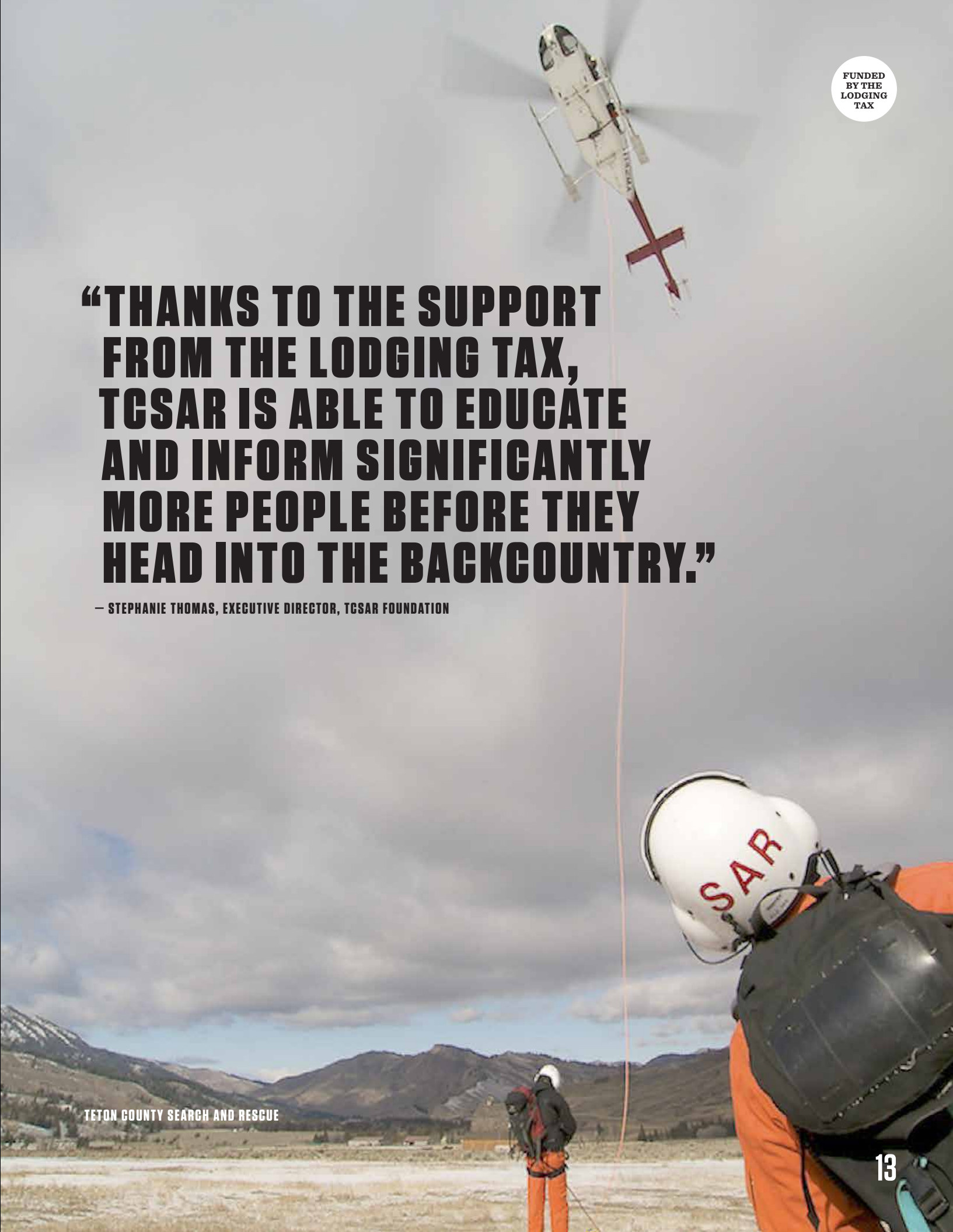


TOTAL BUDGET
\$4,235,747

FUNDED
BY THE
LODGING
TAX

“THANKS TO THE SUPPORT
FROM THE LODGING TAX,
TCSAR IS ABLE TO EDUCATE
AND INFORM SIGNIFICANTLY
MORE PEOPLE BEFORE THEY
HEAD INTO THE BACKCOUNTRY.”

— STEPHANIE THOMAS, EXECUTIVE DIRECTOR, TCSAR FOUNDATION



TETON COUNTY SEARCH AND RESCUE

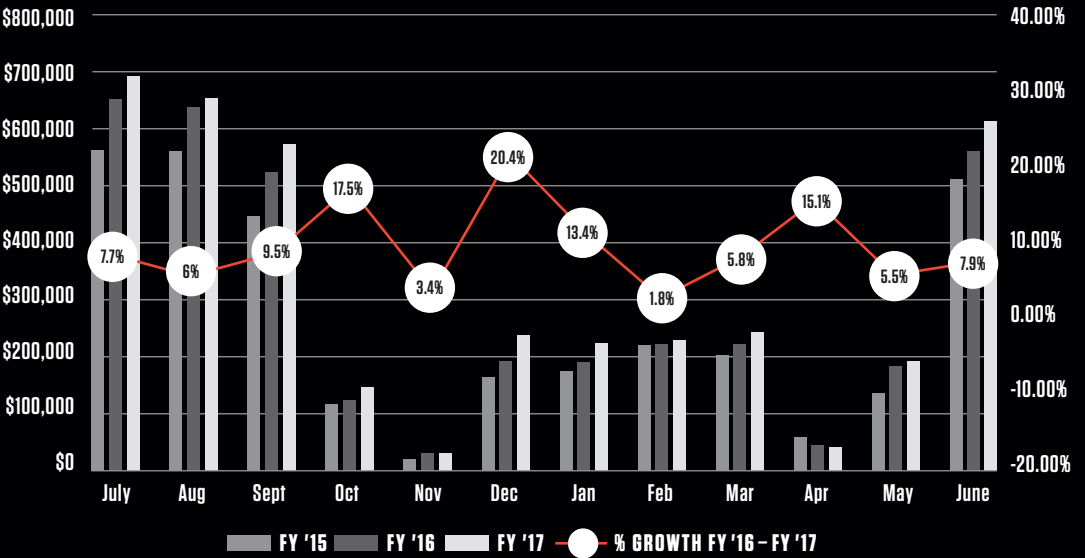


RENDEZVOUS FESTIVAL

JHTTB LODGING TAX RECEIPTS

JHTTB Lodging Tax Receipts

Month	FY '15	FY '16	FY '17	% Growth FY '15-FY '16	% Growth FY '16-FY '17	% Growth FY '15-FY '17
July	\$570,722.17	\$645,620.16	\$695,036.89	13.12%	7.65%	21.78%
August	\$563,588.50	\$615,915.34	\$652,667.72	9.28%	5.97%	15.81%
September	\$435,035.57	\$518,939.88	\$568,441.53	19.29%	9.54%	30.67%
October	\$115,927.62	\$117,336.68	\$137,841.29	1.22%	17.48%	18.90%
November	\$22,955.81	\$27,723.20	\$28,667.30	20.77%	3.41%	24.88%
December	\$167,584.17	\$192,929.41	\$232,181.16	15.12%	20.35%	38.55%
January	\$184,882.93	\$194,809.88	\$221,001.31	5.37%	13.44%	19.54%
February	\$220,881.07	\$222,248.24	\$226,223.25	0.62%	1.79%	2.42%
March	\$203,062.40	\$224,648.92	\$237,648.60	10.63%	5.79%	17.03%
April	\$30,695.69	\$28,311.41	\$32,595.33	-7.77%	15.13%	6.19%
May	\$155,678.76	\$188,555.26	\$198,898.90	21.12%	5.49%	27.76%
June	\$511,238.48	\$568,338.58	\$613,388.16	11.17%	7.93%	19.98%
Total	\$3,182,253.17	\$3,545,376.96	\$3,844,591.44	11.41%	8.44%	20.81%



THESE TAX RECEIPTS REPRESENT ONLY THE JHTTB PORTION AND ARE ACTUAL ADJUSTED NUMBERS.

JHTTB MISSION & VISION

Our mission: to effectively spend lodging tax funds to promote travel and tourism to Teton County in a manner that is consistent with the shared values of our community. Our contributions will reflect stewardship of our natural resources, highlight our outstanding assets and amenities, and strive toward sustainability.

Our vision: as a world leader in responsible tourism, the JHTTB is dedicated to developing a healthy and vibrant fall, winter and spring economy that preserves our natural capital and enhances the well-being of our community.



GRAND TETON NATIONAL PARK GROOMED TRAILS

A COMMUNITY WE SUPPORT



“TTB FUNDING HELPS US HAVE A MUCH BIGGER REACH. ... WITHOUT IT, THESE EVENTS WOULD NOT BENEFIT JH NEARLY AS MUCH.”

— BRIAN KRILL, EXECUTIVE DIRECTOR, JACKSON HOLE SKI & SNOWBOARD CLUB



JACKSON HOLE SKI & SNOWBOARD CLUB



POLE, PEDAL, PADDLE EVENT



EUKANUBA STAGE STOP RACE

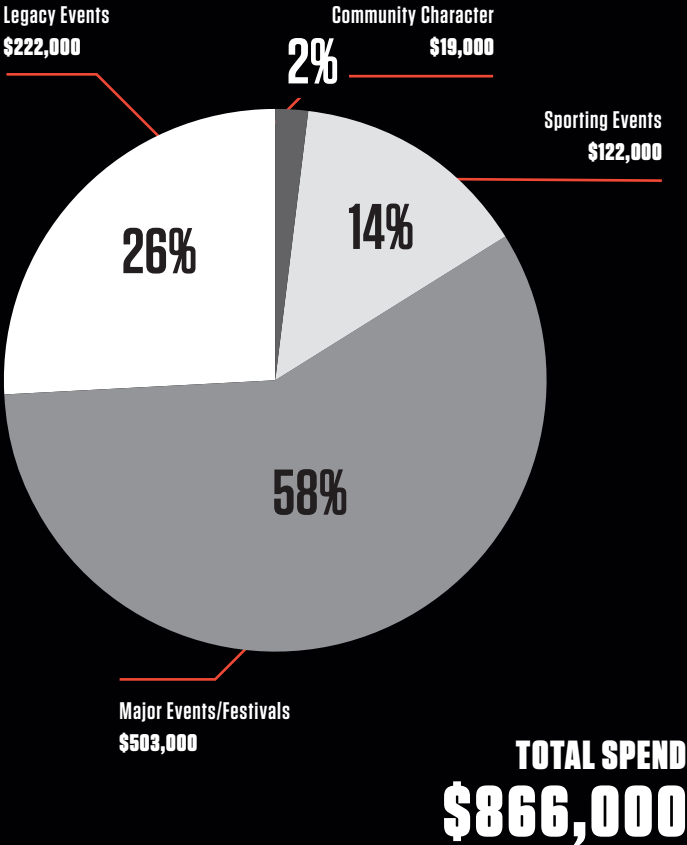
JHTTB FUNDED
COMMUNITY EVENTS

“THROUGH THE TRAVEL AND TOURISM BOARD’S EVENT GRANTS PROGRAM, JACKSON YOUTH HOCKEY HAS PROVIDED MANY VISITING FAMILIES THE OPPORTUNITY TO NOT ONLY PLAY THE GREAT GAME OF HOCKEY IN JACKSON HOLE, BUT TO ALSO EXPERIENCE OUR OTHER RECREATIONAL ACTIVITIES.”

— DAVID ELLINGSON, EXECUTIVE DIRECTOR, JACKSON YOUTH HOCKEY



JACKSON YOUTH HOCKEY



FALL	1% for the Tetons — Video Blitz	\$3,000	FALL TOTAL \$149,000
	CrushFest	\$3,000	
	Culinary Conference	\$3,000	
	10th Annual Fall Soccer Classic	\$10,000	
	Wyoming Snow and Avalanche Workshop (WYSAW)	\$10,000	
	Fall Race Series	\$20,000	
	SHIFT	\$100,000	
WINTER	Wyoming Stargazing Free Fridays	\$1,000	WINTER TOTAL \$612,000
	DW Nutcracker	\$3,000	
	JH Invitation Skating	\$3,000	
	Winter Block Party	\$3,000	
	2016 Special Olympics Wyoming Winter Games	\$5,000	
	Jackson Hole Wildlife Symposium	\$5,000	
	Snow King Fireworks	\$5,000	
	Western Wyoming Shoot Out	\$6,000	
	Scott Smith Mite Tournament & Squirt Hockey Tournament	\$7,000	
	2016 Black Diamond Hockey League Playoffs	\$10,000	
	Moose Chase, Downhill, PPP	\$12,000	
	Jackson Hole Shrine Club Cutter Races	\$15,000	
	Jackson Hole Shrine Skijoring Club	\$15,000	
	Junior Race Series	\$17,000	
SPRING	Eukanuba Stage Stop Race	\$25,000	SPRING TOTAL \$105,000
	41st Annual World Championship Snowmobile Hill Climb	\$30,000	
	Rendezvous Festival	\$450,000	
	2016 USA Yoga Asana Regional Championships	\$2,000	
	Wyoming Whitewater Championships	\$2,000	
	Eco-Fair	\$3,000	
	Jackson Hole Half Marathon	\$3,000	
	Ultimate Towner	\$5,000	
	Backcountry Sports Symposium	\$10,000	
	Jackson Hole Lacrosse Jamboree	\$15,000	
	Grand Targhee Spring Break Away	\$30,000	TOTAL BUDGET \$866,000
	Elkfest/Old West Days	\$35,000	

CHAMBER OF COMMERCE SUPPORTED SERVICES

VISITOR SERVICES LOCATIONS (4)

Total visits: 336,755
Jackson Hole and Greater Yellowstone Visitor Center
Summer: 52% / Shoulder seasons: 48%

Total visits: 57,390
(New) Jackson Hole Airport
Winter: 100%

Total visits: 59,126
Chamber of Commerce Main Office
Summer: 59% / Shoulder seasons: 41%

Total visits: 10,712
(New) Home Ranch Welcome Center
Opened in May; only recorded one month

Hotel referrals: 25,266
Summer: 39% / Shoulder seasons: 51%

EVENTS DEPARTMENT

Advertising — funding for Elkfest/Old West Days

Facilitate the process of the event grant cycles

Coordinate event managers from Travel and Tourism Board-sponsored events to maximize marketing efforts and exposure

Work with the sub-committee for special events to coordinate and facilitate event festival time periods, including February, March, May, June and October

DESTINATION GLOBAL SALES

Destination representation at 19 major tradeshow domestically and internationally for individual and group businesses

Provide opportunities for local businesses to participate in tradeshow

Support PR events in international markets in conjunction with local businesses

Face-to-face interaction with travel writers, travel agents, tour operators, meeting planners and consumers worldwide

Oversee visiting travel writers, tour operators and meeting planners; create itineraries and experiences based on their focus to better educate them on the offerings and opportunities that exist in Teton County

Conduct over 800 meetings and interact with over 1,200 consumers annually worldwide

Focus on promoting winter, fall and spring months



VISITOR CENTER



VISITOR SERVICES



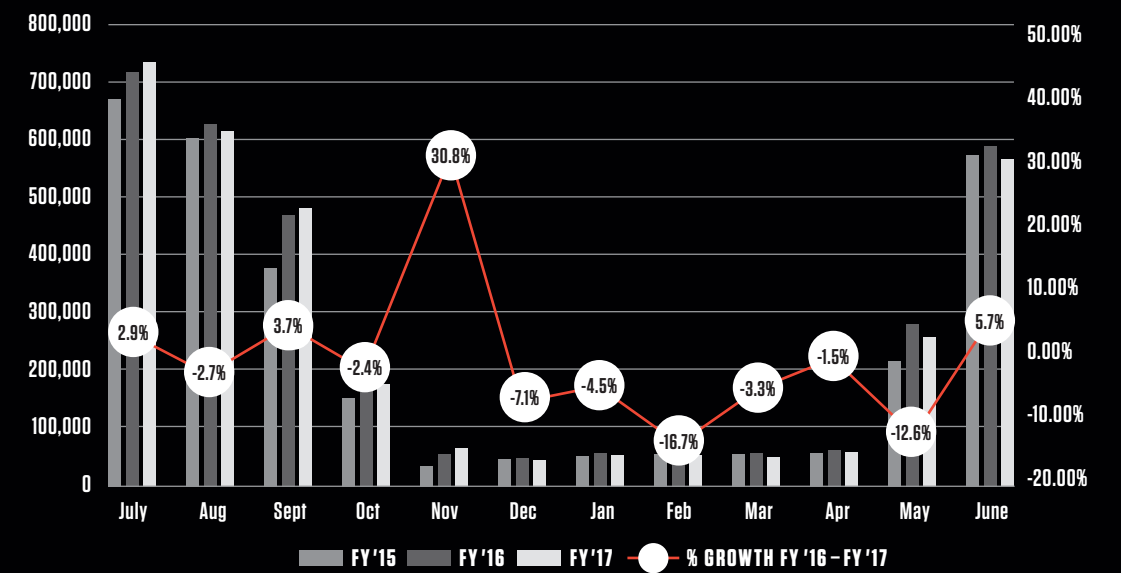
JACKSON HOLE AIRPORT VISITOR SERVICE AGENT



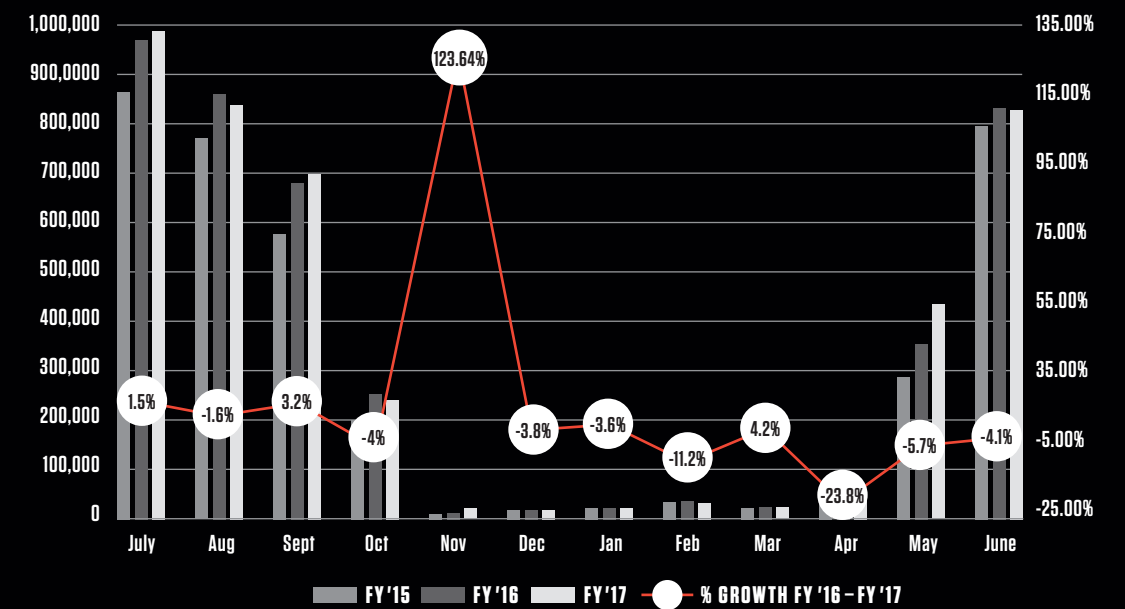
YELLOWSTONE NATIONAL PARK

NATIONAL PARK VISITATION

Grand Teton National Park Recreation-Visitation

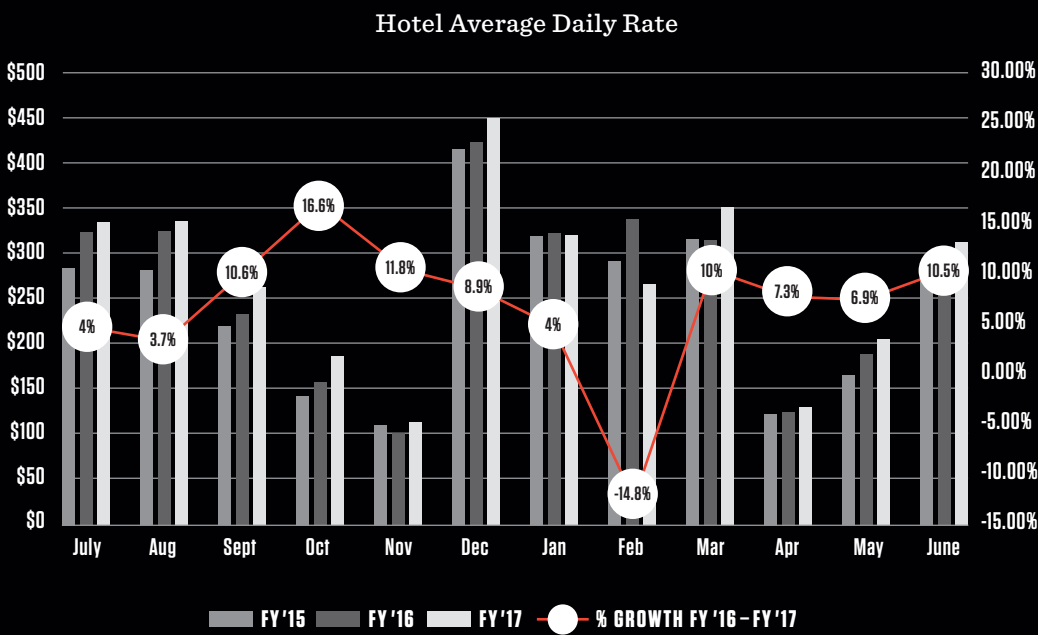
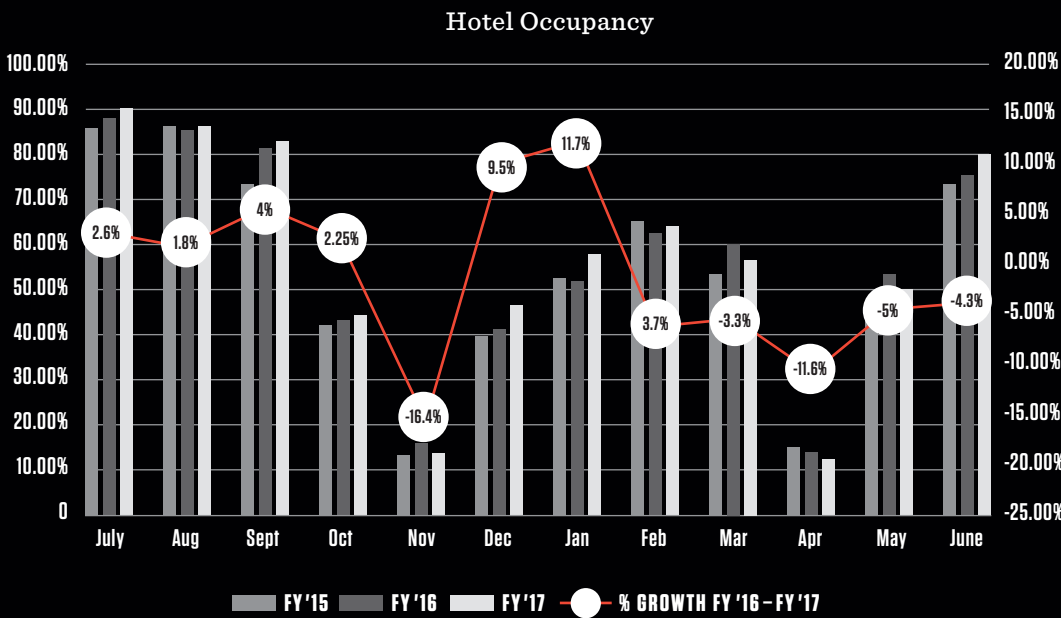


Yellowstone National Park Recreation-Visitation



SOURCE: IRMA.NPS.GOV

HOTEL OCCUPANCY AND AVERAGE DAILY RATE



NUMBERS ADJUST MONTHLY BASED ON REPORTING.
SOURCE: DESTIMETRICS



CELEBRATING OUR WESTERN HERITAGE WITH THE CUTTER RACES



SPECIAL OLYMPICS WYOMING

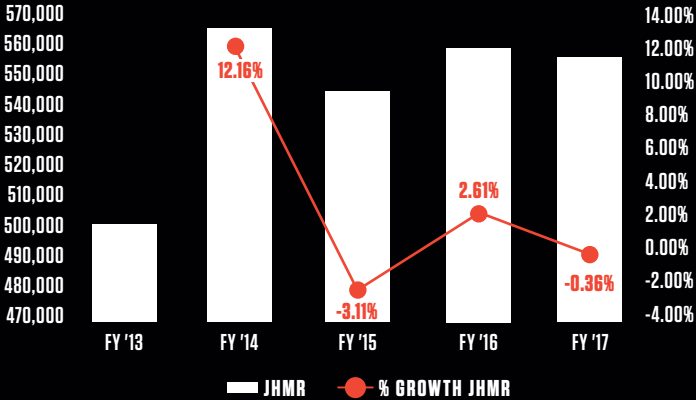


WORLD CHAMPIONSHIP SNOWMOBILE HILL CLIMB

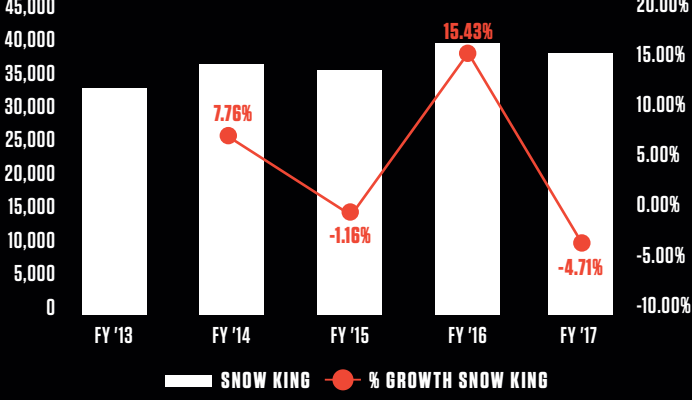


SKIER VISITATION

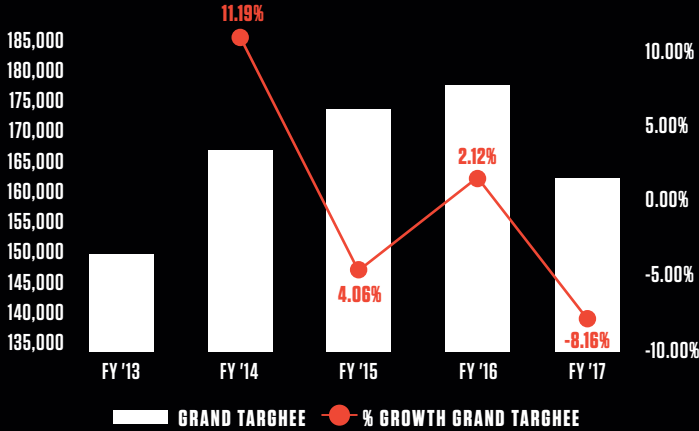
Jackson Hole Mountain Resort Skier Days



Snow King Resort Skier Days



Grand Targhee Resort Skier Days

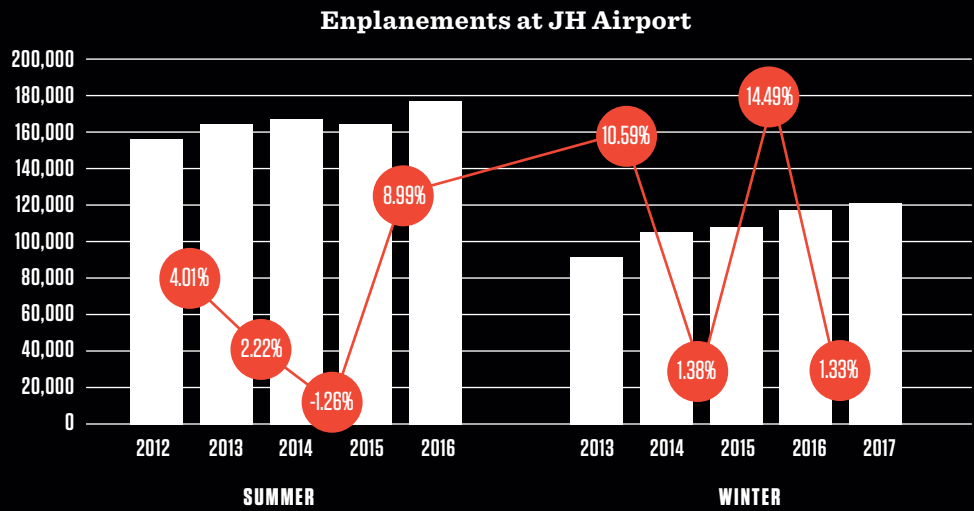


SOURCE: JACKSON HOLE MOUNTAIN RESORT; SNOW KING RESORT; GRAND TARGHEE RESORT

ENPLANEMENTS
BY SEASON



12 NON-STOP FLIGHTS FROM AROUND THE COUNTRY



SOURCE: JH AIR

CAMPAIGN VISUALS
& STATS

BECOME A PART OF HISTORY
THIS RECORD SEASON

UP TO \$300
FLIGHT CREDIT PP

BOOK NOW >

JACKSON HOLE

WHERE WILD AND SERENE
CONVENE

UP TO \$300
FLIGHT CREDIT PP

BOOK NOW >

JACKSON HOLE

WE DON'T HAVE SNOW DAYS,
WE HAVE SNOW MONTHS

UP TO \$300
FLIGHT CREDIT PP

BOOK NOW >

JACKSON HOLE

WHERE WILD AND SERENE
CONVENE

EXPERIENCE
WINTER >

JACKSON HOLE

YOUR INNER WILD NEEDS
AN ESCAPE PLAN

EXPERIENCE
WINTER >

JACKSON HOLE

96,605,593

IMPRESSIONS (+8% YOY)

66%

VIDEO COMPLETION RATE (+20% YOY)

72,120

FLIGHT SEARCHES
(+27% YOY)

5,825

TOTAL NIGHTS
(+15% YOY)

995

FLIGHT BOOKINGS
(+13% YOY)



FUNDED
BY THE
LODGING
TAX



JACKSON HOLE LACROSSE

FUNDED
BY THE
LODGING
TAX



ECO-FAIR



4JacksonHole.org

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