

STAY WILD.

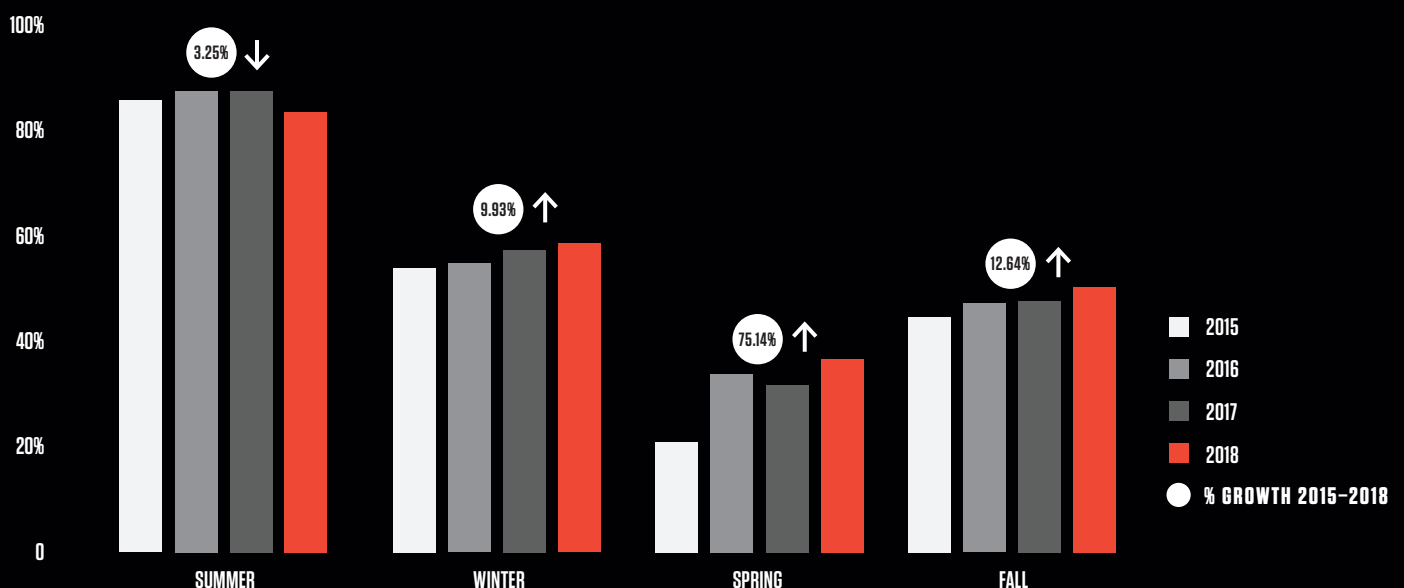
JACKSON HOLE TRAVEL
& TOURISM BOARD
ANNUAL REPORT

FISCAL YEAR 2018
07.01.17—06.30.18

Jackson Hole is more than a destination. We're a community. And our ultimate goal is to create a sustainable economy where families can live year-round. Tourism is a big part of our economy, but tourism needs to be consistent and manageable.

So we launched a movement called Stay Wild. The campaign serves as a rally cry for the fall, winter and spring. One that locals can believe in and adventure seekers want to be a part of. We combined a message of preservation, conservation and culture into a simple but powerful call to action, urging locals and tourists to help keep Jackson Hole raw, rugged and wild.

Average Hotel Occupancies by Season, 2015–2018*



SOURCE: DESTIMETRICS

*SUMMER 2018 OCCUPANCY NUMBERS ESTIMATED THROUGH AUGUST 15, 2018

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A MESSAGE FROM OUR CHAIRMAN

As I wrap up my final duties as board chair of the JHTTB, I couldn't help but reflect on another year of positive results from the collection of the lodging tax. Collections throughout the year remain strong and ended 15.5% higher than last year. Revenue from this tax is critical to Jackson Hole. The tax pays for visitor impact, pathways, parks and recreation, transit, fire and EMS services. It also supports visitor services provided by the Chamber of Commerce and event funding, including key community events that help define Jackson. Promoting visitation during the shoulder season helps maintain a year-round economy that provides sustainable jobs, supporting significantly more of our workforce with year-round employment. This leads to a stable, less transient and more engaged community.

New this year was the introduction of the STAY WILD campaign. This is an invitation to explore and follow in the footsteps of the locals who have always been champions of the land, who have lived in this intersection of conservation and recreation, and who understand that preservation is more than protection. It's about celebrating this wild by respecting it, reveling in it and channeling the spirit of Jackson. As the campaign evolves, it will continue to share our community values and what we as locals do to Keep Jackson Wild.

This report outlines the expenditures of all entities that manage the lodging tax and illustrates the growth in revenue over the years. As the economy remains strong and worldwide tourism is at an all-time high, Teton County continues to experience steady collections. Teton County is fortunate to maintain this revenue stream while other counties across the state suffer budget shortfalls due to their dependence on minerals. Tourism fuels Teton County. The Jackson Hole Travel & Tourism Board is committed to managing tourism responsibly not only by promoting shoulder season visitation during periods where capacity is available and the experience for all is more enjoyable, but also by introducing several sustainability initiatives for travelers to practice while visiting this place we all call home. We hope you take a moment to review this report to learn more about how the lodging tax funds are allocated to better serve our community and visitors alike.

Regards,



Keely Herron, Chairman
Jackson Hole Travel & Tourism Board

TRAVEL & TOURISM AT WORK FOR TETON COUNTY

**\$1.17 BILLION
TRAVEL-GENERATED
SPENDING**

**8,720
TRAVEL-GENERATED
JOBS**

**\$61.7 MILLION
TRAVEL-GENERATED
TAXES**

In 2017, Teton County welcomed 1,802,000 overnight visitors to the area.

Domestic and international travelers spent **\$1.17 billion** in Teton County and generated **\$61.7 million** in state and local taxes. This tax revenue is used to support public infrastructure such as streets and roads, fire and police protection, and many other public services in Teton County.

Visitors paid **59%** of all sales tax collections in Teton County.



In 2017, travelers generated **8,720 jobs** in Teton County.

Travelers supported 27% of Teton County's total private industry employment. Without the jobs generated by the travel industry, the 2016 Teton County unemployment rate of 3% would have been **30%.***

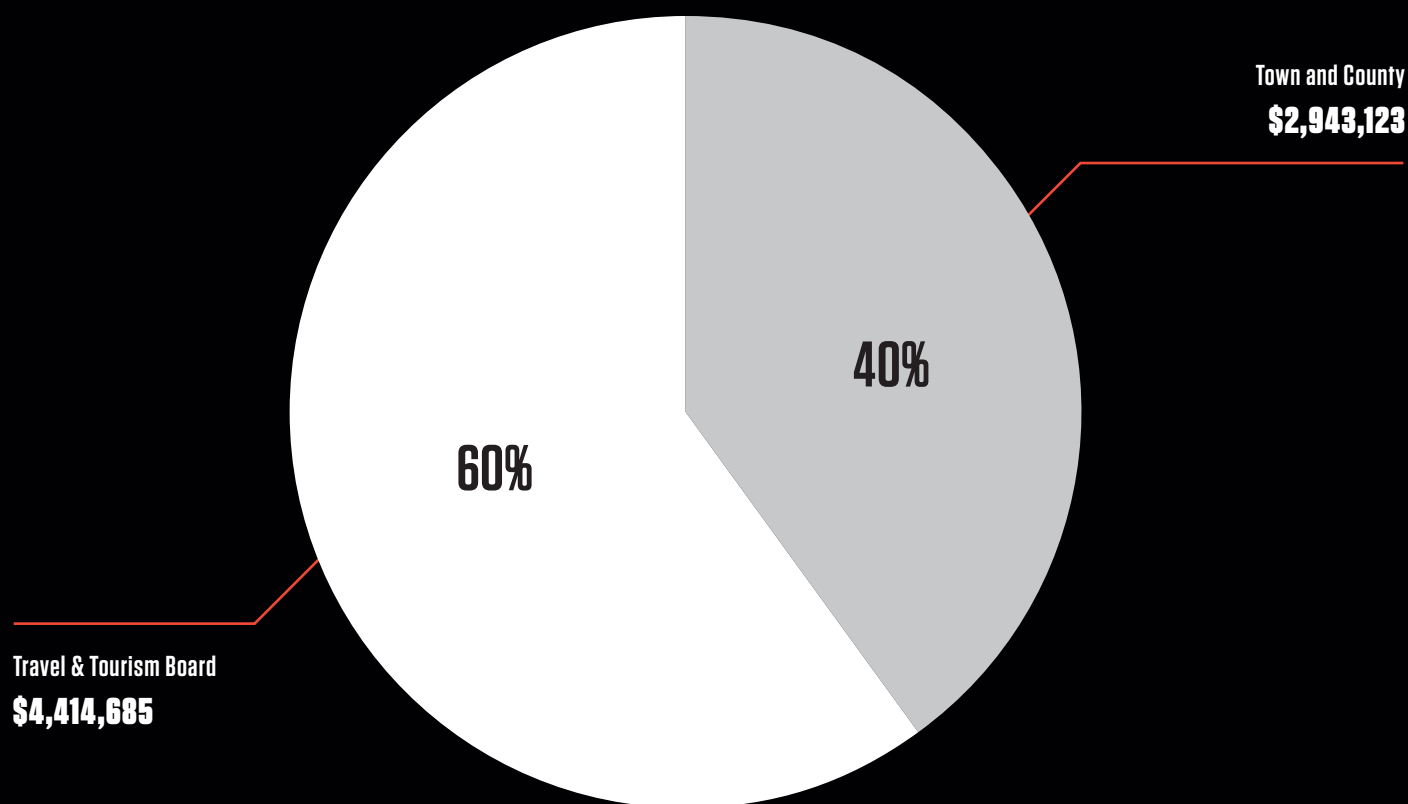


If not for the taxes generated by the travel and tourism industry, the average household in Teton County would have had to pay **\$6,503** more in taxes for existing government services.

***THESE EMPLOYMENT NUMBERS REPRESENT 2016 DATA. AT THE TIME OF THIS REPORT, 2017 DATA FOR THESE FIGURES WAS NOT AVAILABLE.**

SOURCES: DEAN RUNYAN ASSOCIATES, TRAVEL IMPACT REPORT, APRIL 2018; 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.



THE 60/40 SPLIT IS DETERMINED AT THE STATE LEVEL. ALL OTHER COUNTIES HAVE A 90/10 SPLIT, WHERE 90% OF FUNDS GO TOWARD PROMOTION AND 10% OF FUNDS GO TOWARD VISITOR IMPACT.

**TOTAL FUND
\$7,357,808**

WHAT TOURISM MEANS FOR US

FOR OUR COUNTY

PUBLIC SAFETY

In FY 2018, \$150,000 of the revenue to Teton County from the lodging tax was expended for the general operations of the Jackson Hole Fire/EMS Department. The mission of Jackson Hole Fire/EMS is the protection of life and property from the adverse effects of fires and medical emergencies, and exposure to man-made and/or natural dangerous conditions.

PARKS AND RECREATION

In FY 2018, \$300,000 of the revenue to Teton County from the lodging tax was expended for the general operations of the Parks & Recreation Department. This funding provided support for activities including, but not limited to, snow plowing, trash pickup, and general park cleaning and maintenance.

PATHWAYS

In FY 2018, over \$40,000 of the revenue to Teton County from the lodging tax was expended to support the Pathways system. This funding provided support for asphalt repairs, wayfinding signage, pathway benches and general maintenance.

PUBLIC TRANSPORTATION

In FY 2018, nearly \$500,000 of the revenue to Teton County from the lodging tax was expended to support the general operations of the START bus system, as well as bus transportation to Grand Targhee. These systems provide local and regional transportation services to both residents and visitors.

TOTAL SOLAR ECLIPSE PREPARATION AND MANAGEMENT

In FY 2018, over \$30,000 of the revenue to Teton County from the lodging tax was expended for preparation and emergency management services related to the 2017 total solar eclipse. This funding provided support for the planning and coordination of multiple agencies and entities collaborating to manage and mitigate impact from the total solar eclipse.

JACKSON HOLE HISTORICAL SOCIETY AND MUSEUM

In FY 2018, \$150,000 of the revenue to Teton County from the lodging tax was expended for the general operations of the Historical Society and Museum, which collects, preserves and explores the region's rich history and creates educational programs to preserve and promote the unique character of Jackson Hole.

TETON COUNTY FAIRGROUNDS

In FY 2018, over \$10,000 of the revenue to Teton County from the lodging tax was expended to support the construction of new stall barns at the Teton County Fairgrounds. These stall barns are utilized by overnight guests who are competing at the fairgrounds.

FOR OUR TOWN

TRANSPORTATION

In FY 2018, 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 2018, \$333,836 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 recreation for visitors and tourists while preserving the natural landscape in a responsible way.

PUBLIC SAFETY

In FY 2018, \$266,620 of the income received by the town of Jackson through the lodging tax was allocated to this nonrestricted 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 nonrestricted 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



JACKSON HOLE FIRE/EMS DEPARTMENT

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 also reinvested into Teton County. These funds help build a sustainable economic force and high quality of life for our residents.

COUNTY & TOWN SPENDING

TSE Preparation and Management
\$32,860

Pathways
\$41,125

Jackson Hole Historical Society and Museum
\$150,000

Teton County Fairgrounds
\$10,162

Fire/EMS
\$150,000

4JH Public Awareness
\$2,000

COUNTY SPEND

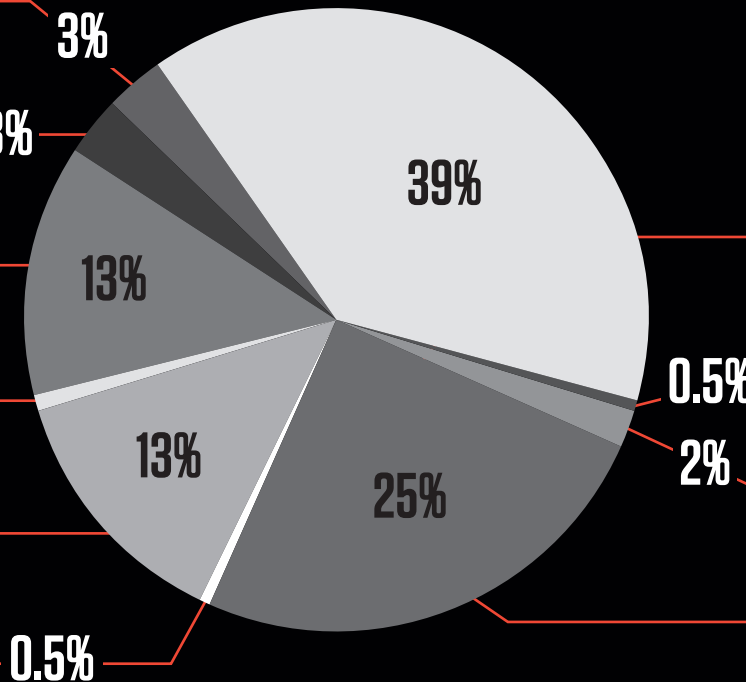
TOTAL COUNTY SPEND
\$1,177,905

START
\$461,757

Global Ties of Wyoming
\$5,000

Grand Targhee Transportation
\$25,000

Parks & Recreation
\$300,000



TOWN SPEND

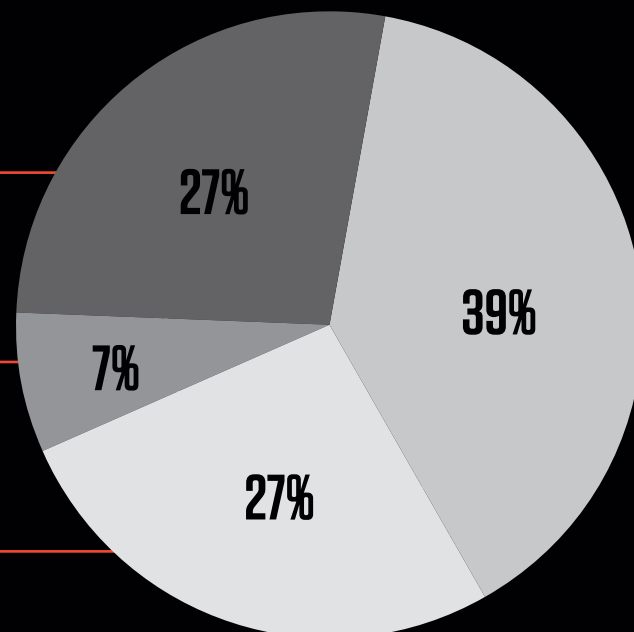
TOTAL TOWN SPEND
\$978,257

Maintenance and Parks
\$263,396

Town Pathways
\$70,440

Public Safety
\$266,620

Public Transportation
\$377,801



JACKSON HOLE TRAVEL & TOURISM BOARD MEMBERS 2018

KEELY HERRON

Joined the Board in 2015
Chairman
Founder
Wonderland Marketing

BRIAN GALLAGHER

Joined the Board in 2016
Vice Chair
Director
CityPASS

ALEX KLEIN

Joined the Board in 2014
Treasurer
General Manager
Grand Teton Lodge Company

BRIAN MODENA

Joined the Board in 2016
Secretary
TMBR Creative Agency

WILLI BROOKS

Joined the Board in 2017
Front of House Manager
and Volunteer Coordinator

CRISTA VALENTINO

Joined the Board in 2017
CEO
Current, LLC

CORY CARLSON

Joined the Board in 2017
Director of Sales and Marketing
Four Seasons Resort and
Residences Jackson Hole

JACKSON HOLE TRAVEL & TOURISM BOARD SUPPORT

KATE SOLLITT

Executive Director,
joined 2013
JHTTB

MAUREEN MURPHY

Event Liaison
Jackson Hole Chamber
of Commerce

PARTNER ORGANIZATIONS

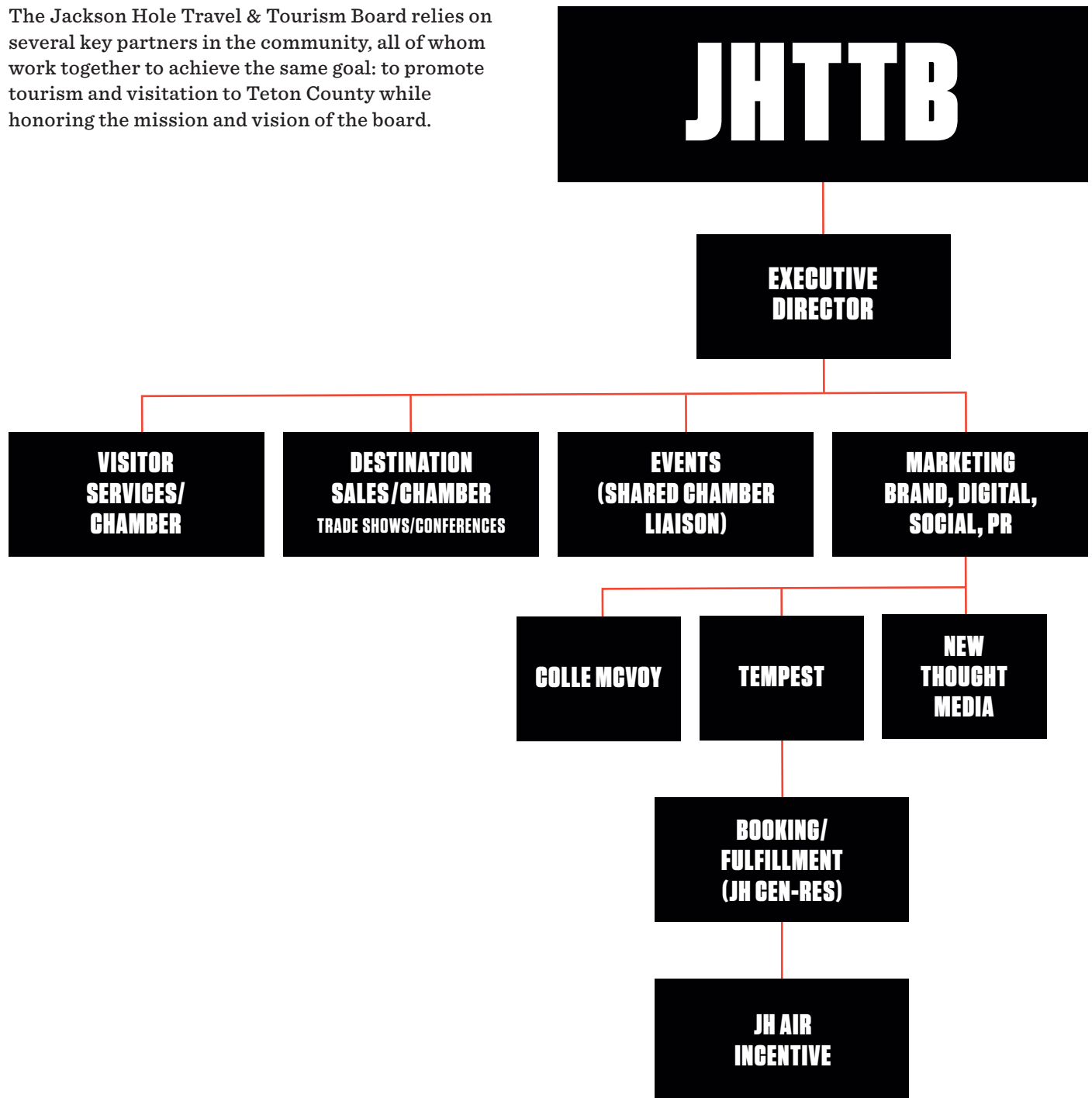
Jackson Hole Chamber
of Commerce

Jackson Hole Central
Reservations

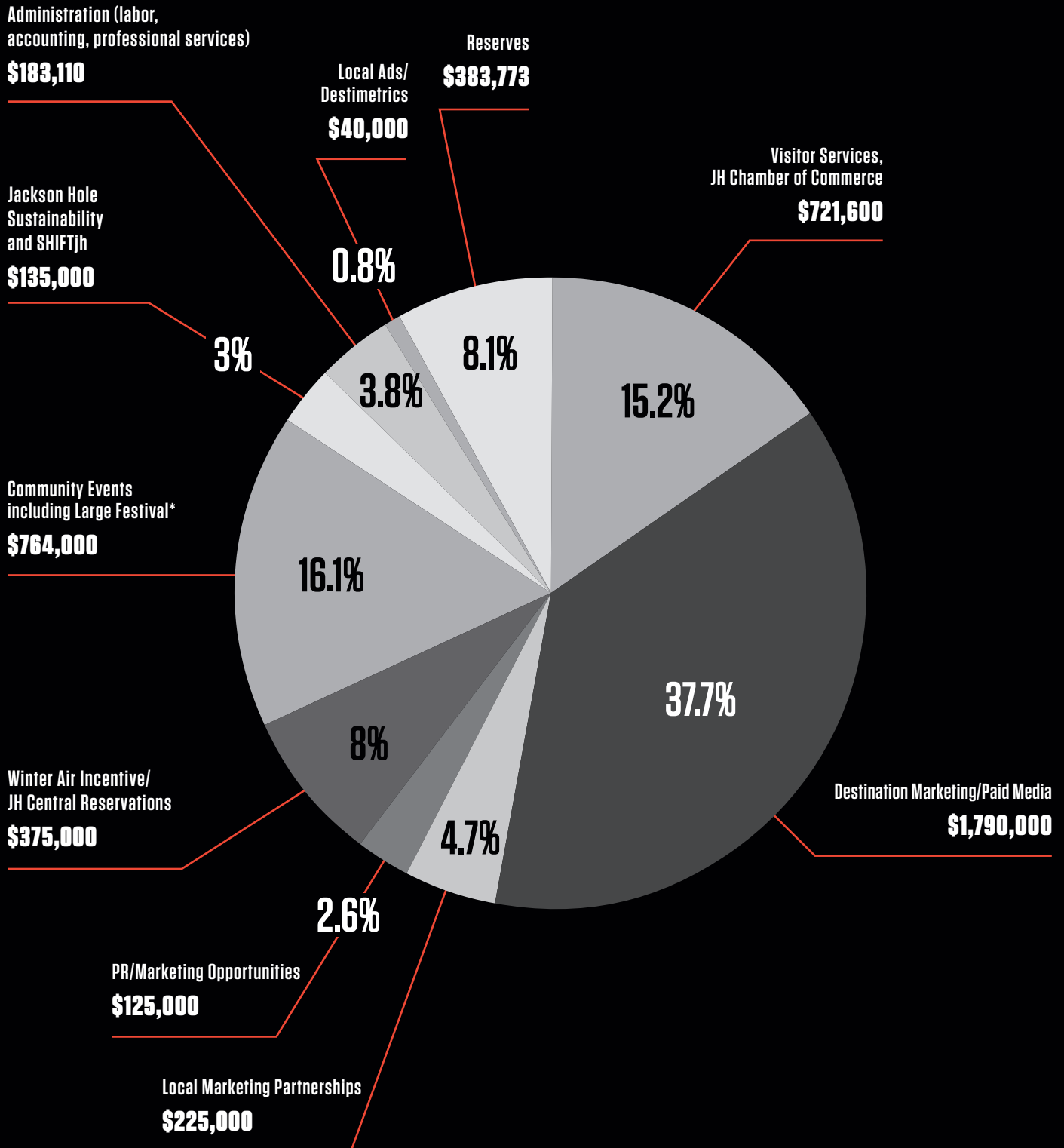
Jackson Hole Air

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 2018 JHTTB BUDGET BREAKDOWN



TOTAL BUDGET
\$4,742,483

*INCLUDES COMMUNITY EVENT COORDINATOR



PARTIALLY
FUNDED
BY THE
LODGING
TAX

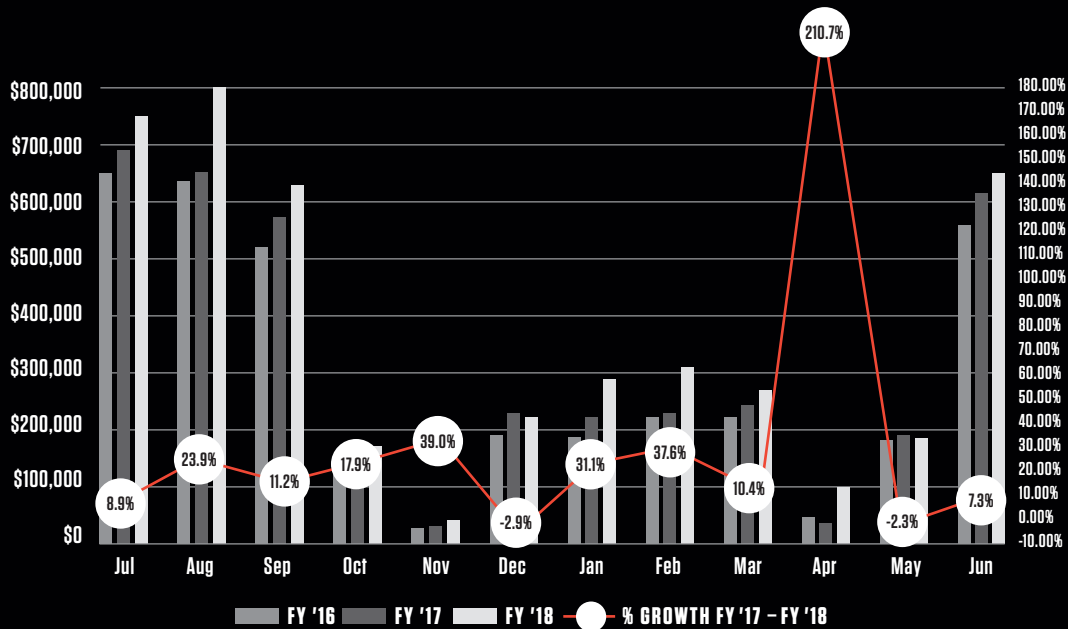


RENDEZVOUS FESTIVAL

JHTTB LODGING TAX RECEIPTS

JHTTB Lodging Tax Receipts

Month	FY '16	FY '17	FY'18	% Growth FY '16-FY '17	% Growth FY '17-FY '18	% Growth FY '16- FY '18
July	\$645,620.16	\$695,036.89	\$756,692.47	7.65%	8.87%	17.20%
August	\$615,915.34	\$652,667.72	\$808,700.01	5.97%	23.91%	31.30%
September	\$518,939.88	\$568,441.53	\$631,843.45	9.54%	11.15%	21.76%
October	\$117,336.68	\$137,841.29	\$162,461.40	17.48%	17.86%	38.46%
November	\$27,723.20	\$28,667.30	\$39,833.63	3.41%	38.95%	43.68%
December	\$192,929.41	\$232,181.16	\$225,544.01	20.35%	-2.86%	16.90%
January	\$194,809.88	\$221,001.31	\$289,662.30	13.44%	31.07%	48.69%
February	\$222,248.24	\$226,223.25	\$311,313.63	1.79%	37.61%	40.07%
March	\$224,648.92	\$237,648.60	\$262,295.72	5.79%	10.37%	16.76%
April	\$28,311.41	\$32,595.33	\$101,285.99	15.13%	210.74%	257.76%
May	\$188,555.26	\$198,898.90	\$194,369.92	5.49%	-2.28%	3.08%
June	\$568,338.58	\$613,388.16	\$658,053.09	7.93%	7.28%	15.79%
Total	\$3,545,376.96	\$3,844,591.44	\$4,442,055.62	8.44%	15.54%	25.29%



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.

“THE JH LODGING TAX FUNDS HAVE HELPED RAISE AWARENESS FOR NORDIC SKIING, FAT TIRE BIKING AND OUR EXTENSIVE WINTER TRAILS, PROVIDING FUN, ACTIVE, ALTERNATIVE ACTIVITIES FOR WINTER VISITORS AND OUR COMMUNITY.”

PARTIALLY
FUNDED
BY THE
LODGING
TAX

— NANCY LEON, JH NORDIC ALLIANCE



GRAND TETON NATIONAL PARK GROOMED TRAILS

A COMMUNITY WE SUPPORT



“THIS EVENT FUNDING IS ABOUT BUILDING COMMUNITY AND NURTURING THE CORE CHARACTER OF JACKSON. WITHOUT THIS FUNDING, SMALLER, KEY COMMUNITY EVENTS WOULDN’T BE POSSIBLE. EVENTS THAT CONTRIBUTE TO OUR COMMUNITY HISTORY AND CHARACTER, SUPPORT OUR YOUTH AND KEEP JACKSON ‘REAL.’”

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



ULTIMATE TOWNER

©David Bowers Photography



JACKSON HOLE SKI & SNOWBOARD CLUB



JHSC MOOSE CHASE

JHTTB-FUNDED COMMUNITY EVENTS

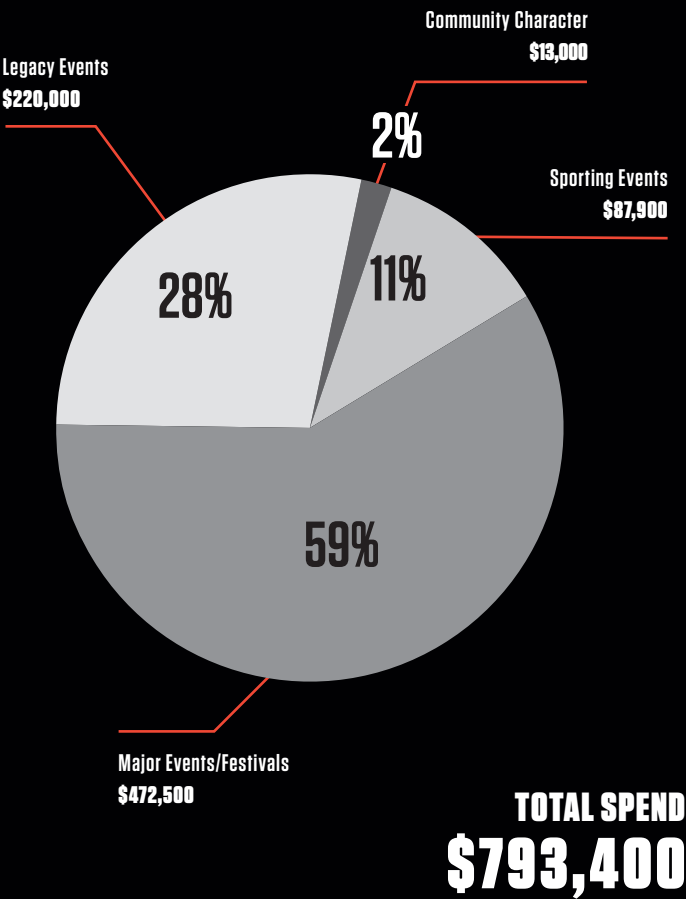
“THANKS TO THE FUNDING FROM THE LODGING TAX, OUR FALL CLASSIC IS ABLE TO ATTRACT MORE TEAMS FROM AROUND THE REGION, MAKING OUR TOURNAMENT MORE ATTRACTIVE TO ATTEND. THE FUNDING ALSO AIDS US IN MARKETING OTHER ACTIVITIES THAT SOCCER FAMILIES CAN ENJOY OFF THE FIELD TO ENHANCE THEIR EXPERIENCE WHILE VISITING.”

— ADAM CARRANZA, EXECUTIVE DIRECTOR, JACKSON YOUTH SOCCER



©Coombs Photography

JACKSON YOUTH SOCCER



FALL	Women in Leadership Summit	CWC, WLRA, CFArts	\$3,000
	Fall Race Series	JH Ski & Snowboard Club	\$17,000
	Fall Soccer Classic	JH Youth Soccer	\$10,000
	JH Snow & Avalanche Services WYSAW	TCSAR	\$7,500
	Regional Ice Skating Workshop	JH Skating Club	\$2,400
	Jackson Hole Wild Fest	JH Wild	\$8,000
	50th Anniversary Fireman's Ball	JH Fireman's Association	\$20,000
	SHIFT	Center for Jackson Hole	\$100,000

FALL TOTAL
\$167,900

WINTER	Alice in Wonderland	Dancers' Workshop	\$3,000
	Free Nordic Ski/Bike/Snow Day	Nordic Alliance	\$3,000
	JH Winter Wonderland	Grand Teton Skating Assoc.	\$1,000
	Junior Race Series	JH Ski & Snowboard Club	\$17,000
	Special Olympics Winter Games	Wyoming Special Olympics	\$5,000
	JH Shriners Skijoring	JH Shriners	\$12,500
	Amsoil SnoCross	Snow King Mtn/ISOC	\$80,000
	JH Shriners Cutter Races	Jackson Hole Shriners	\$12,500
	Eukanuba Dog Sled Race	Dan Carter/Diana Lehn	\$15,000
	Moose Chase, Town Downhill, PPP	JH Ski & Snowboard Club	\$12,000
	World Champion Snowmobile Hill Climb	JH SnowDevils	\$22,500
	Rendezvous Mountain Festival	JHMR	\$360,000

WINTER TOTAL
\$543,500

SPRING	EcoFair	Energy Conservation Works	\$3,000
	JH Lacrosse Jamboree	Jackson Youth Lacrosse	\$9,500
	Backcountry Sports Symposium	TCSAR	\$7,500
	Wyoming Whitewater Championship	JH Kayak Club	\$2,000
	Ultimate Towner	Grand Dynamics	\$10,000
	Grand Targhee Spring Breakaway	Grand Targhee	\$20,000
	Elk Fest/Old West Days	Jackson Hole Chamber of Commerce	\$30,000

SPRING TOTAL
\$82,000

TOTAL BUDGET
\$793,400

CHAMBER OF COMMERCE SUPPORTED SERVICES

VISITOR SERVICES LOCATIONS (4)

Total visits: 519,818
Jackson Hole and Greater Yellowstone Visitor Center
Summer: 55% / Shoulder seasons: 45%

Total visits: 65,000
(New) Jackson Hole Airport
Winter: 100%

Total visits: 132,292
(New) Home Ranch Welcome Center
Summer: 73% / Shoulder seasons: 27%

Hotel referrals: 24,363
Summer: 42% / Shoulder seasons: 48%

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 periods, including February, March, May, June and October

DESTINATION GLOBAL SALES

Provide destination representation at 18 major trade shows 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

Facilitate 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 about the offerings and opportunities that exist in Teton County

Conduct over 800 meetings and interact with more than 1,600 consumers annually worldwide

Focus on promoting winter, fall and spring months



JACKSON HOLE AIRPORT VISITOR SERVICE AGENT



JACKSON HOLE CHAMBER OF COMMERCE DESTINATION SALES



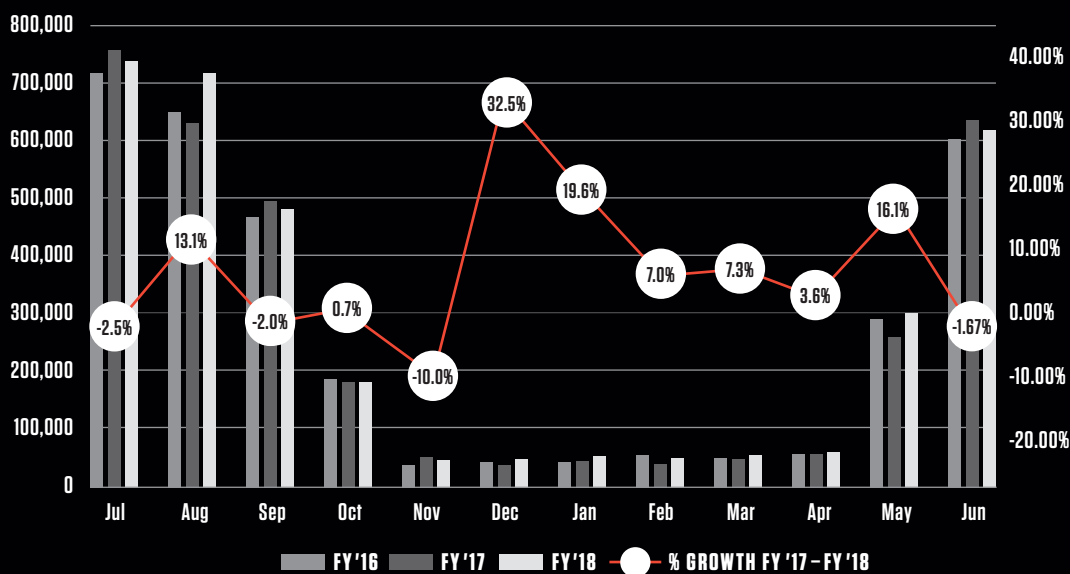
VISITOR CENTER



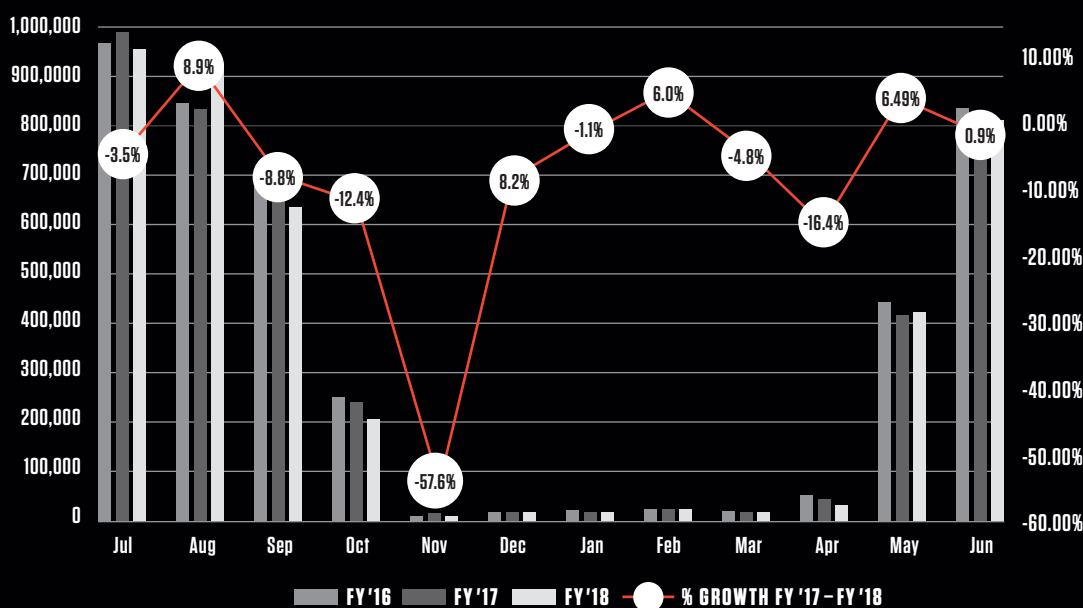
YELLOWSTONE NATIONAL PARK

NATIONAL PARK VISITATION

Grand Teton National Park Recreation Visitation

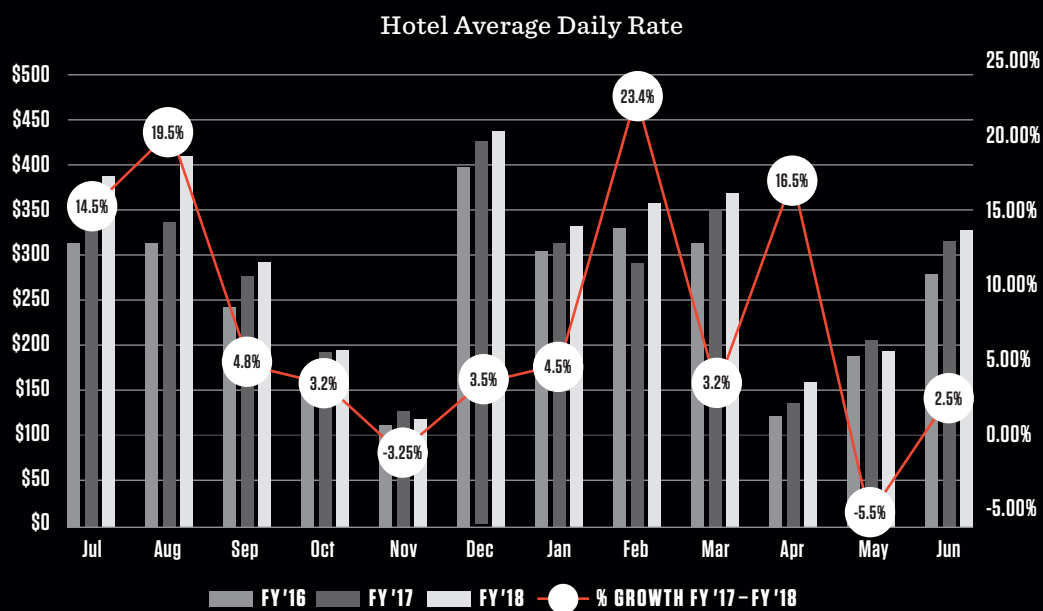
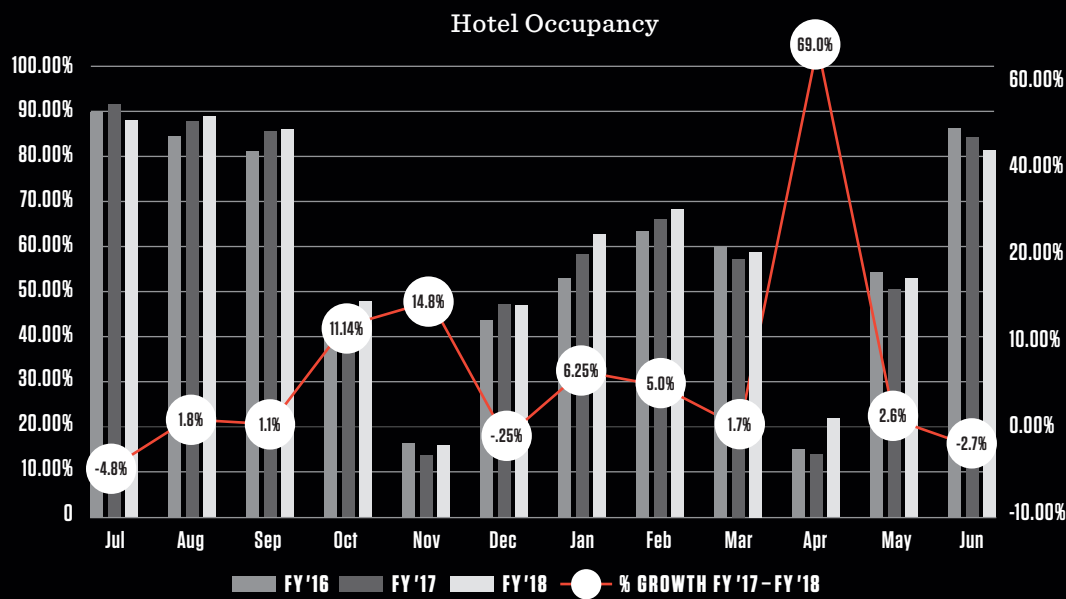


Yellowstone National Park Recreation Visitation



SOURCE: IRMA.NPS.GOV

HOTEL OCCUPANCY AND AVERAGE DAILY RATE



NUMBERS ADJUST MONTHLY BASED ON REPORTING.
SOURCE: DESTIMETRICS



JACKSON HOLE RENDEZVOUS SPRING FESTIVAL



JACKSON HOLE SKI & SNOWBOARD CLUB

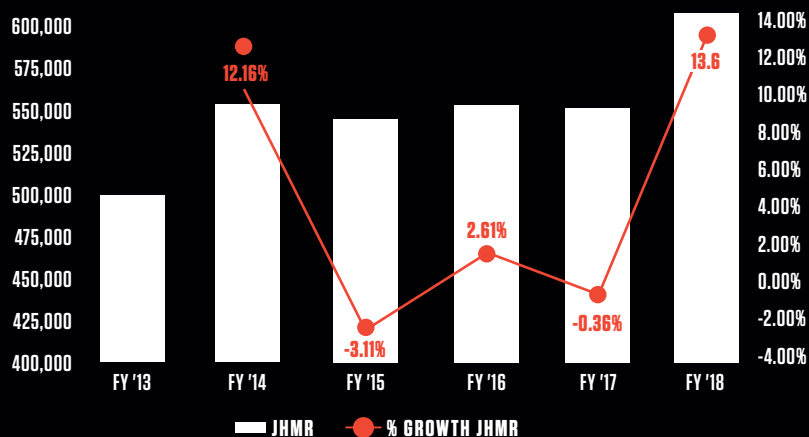


WORLD CHAMPIONSHIP SNOWMOBILE HILL CLIMB

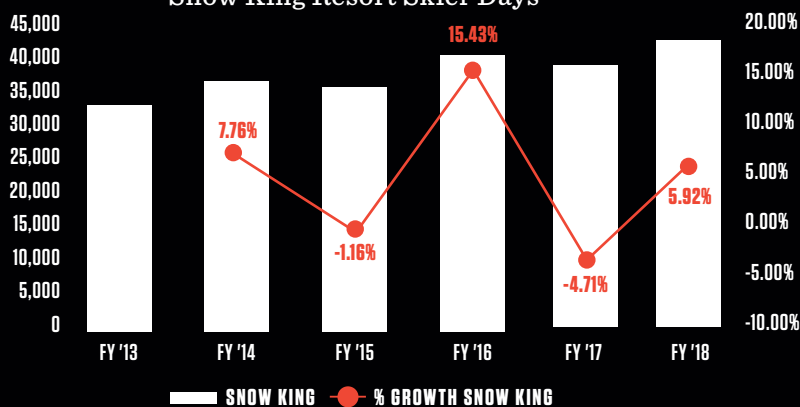


SKIER VISITATION

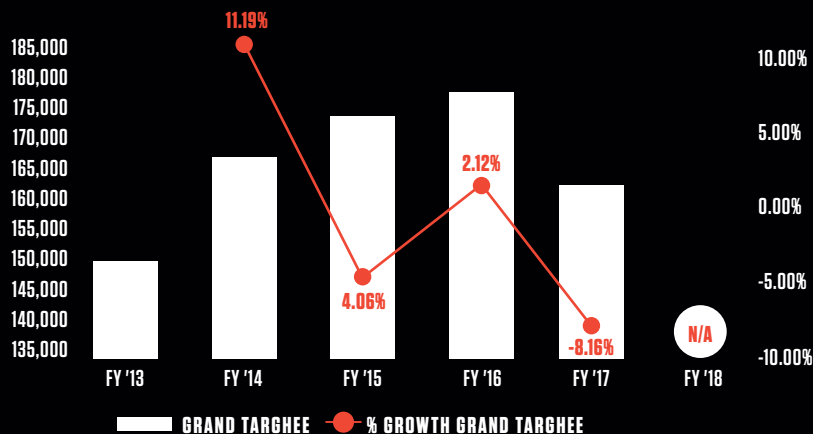
Jackson Hole Mountain Resort Skier Days



Snow King Resort Skier Days



Grand Targhee Resort Skier Days

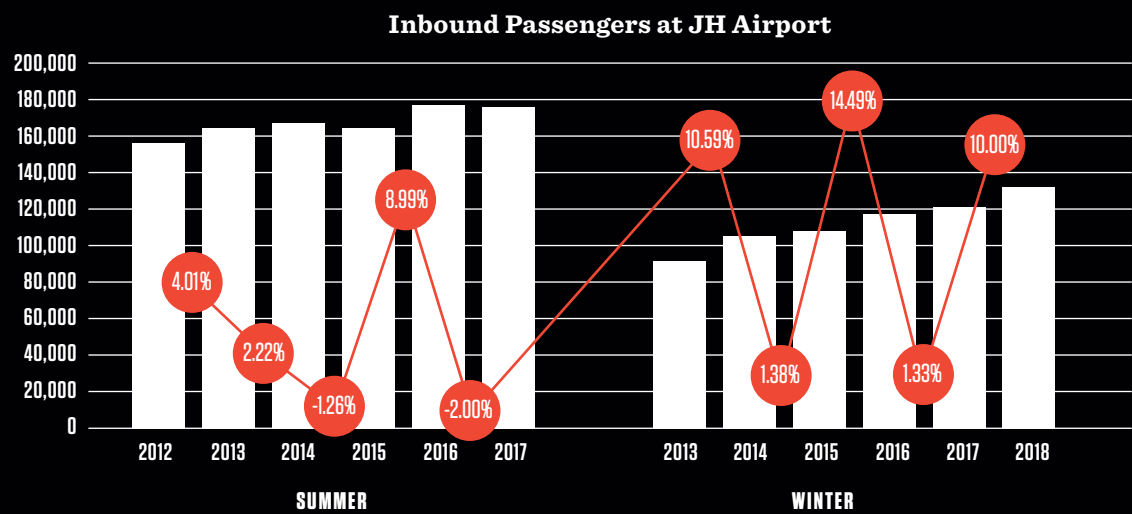


SOURCE: JACKSON HOLE MOUNTAIN RESORT; SNOW KING RESORT; GRAND TARGHEE RESORT

INBOUND PASSENGERS BY SEASON



12 NONSTOP FLIGHTS FROM AROUND THE COUNTRY




SOURCE: JH AIR

CAMPAIGN VISUALS & STATS



JACKSON HOLE
STAY WILD.
We don't hide the "real" Jackson behind the scenes. VisitJacksonHole.com

WHAT MOST PEOPLE CALL THE "OLD WEST" WE CALL LAST NIGHT.



JACKSON HOLE
STAY WILD.
What you see is what you get: rugged, untamed and free. VisitJacksonHole.com

HARDEST WORKING GRAVITY IN AMERICA.

THE ONLY THING THAT CHANGES HERE ARE THE SEASONS.



JACKSON HOLE ECOTOUR ADVENTURES

IT'S NOT ALL FLOWERS AND BUTTERFLIES.



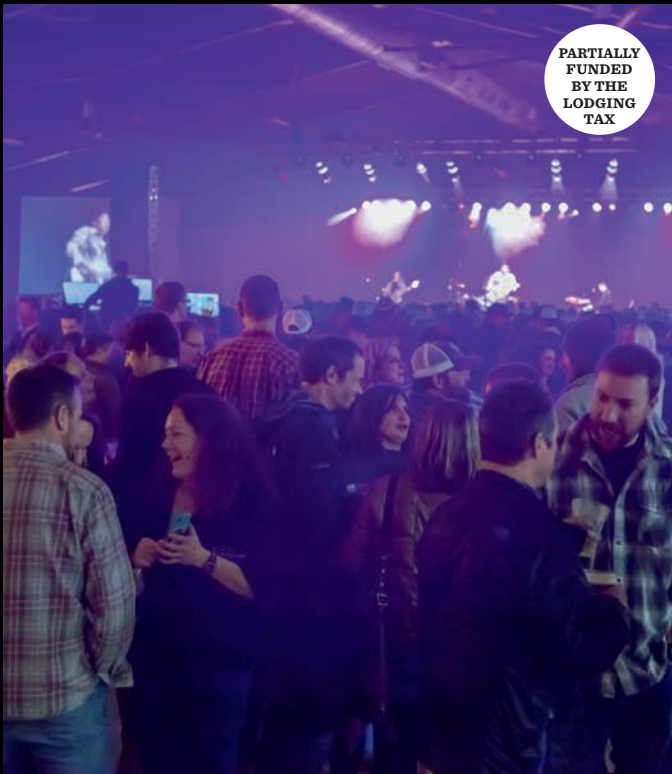
JACKSON HOLE
STAY WILD.

2017-2018 WINTER CAMPAIGN HIGHLIGHTS

69,458,528 PAID MEDIA IMPRESSIONS	23,147 HOTEL SEARCHES
323,175 SESSIONS TO WEBSITE	2,797 605 FLIGHT BOOKINGS HOTEL BOOKINGS
134,495 FLIGHT SEARCHES	22,197 TOTAL SOCIAL MEDIA FANS, ADDING 4,374 NEW FANS 10/1/17-3/12/18



ECO FAIR



FIREMAN'S BALL



SPECIAL OLYMPICS



PARTIALLY
FUNDED
BY THE
LODGING
TAX

JACKSON HOLE NORDIC ALLIANCE



PARTIALLY
FUNDED
BY THE
LODGING
TAX

EGO FAIR



PARTIALLY
FUNDED
BY THE
LODGING
TAX

SPECIAL OLYMPICS



4JacksonHole.org

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TM



MIX
From responsible
sources
FSC® C022483