JACKSON HOLE TRAVELS TOURISM BOARD

ANNUAL REPORT FISCAL YEAR 2021 07.01.20—06.30.21





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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 reflect stewardship of our natural resources, highlight our outstanding assets and amenities, and strive for sustainability.

Our vision: As a world leader in responsible tourism, the Jackson Hole Travel & Tourism Board (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.



A MESSAGE FROM OUR CHAIRMAN

Welcome to the sixth edition of the Jackson Hole Travel and Tourism Board annual report. This past year has presented interesting challenges with the continuing impact to public health brought on by the pandemic, while visitation to Jackson has soared. Lodging tax collections have come in above historical records every month since October 2020 except for January and February 2021, both of which came in on par with historical records.

Leading up to the pandemic, visitation to Jackson Hole benefited from several macro-level tailwinds. Organic promotion via social media, heightened consumer interest in natural environments and outdoor recreation, increased demand for national parks due to promotion by state and national entities, rising multi-destination ski pass sales that made skiing more accessible, and a growing local population all contributed meaningfully to our expanding tourism economy. We expect these tailwinds, all of which have been strengthened by the pandemic, to continue while the longevity of newer trends like remote work, digital nomading, and a preference for domestic destinations over international remains to be seen. Due to the unprecedented levels of visitation largely influenced by factors outside of our control, we responded to the needs of our community and expanded our focus from marketing our off-season and winter to year-round destination management.

What do we mean by this? First off, this is not a 180-degree shift in our strategy, as we have been doing many things around tourism beyond demand marketing for several years. It does not mean we are abandoning our marketing, but rather sharpening our focus on creating messaging that aligns with the values of our community, attracts visitors who are most desirable for our destination, and educates them on lower-impact ways to enjoy our beautiful surroundings. It also represents a broadened set of key success metrics that are maintaining an exceptional visitor experience, a healthy surrounding natural environment, a high quality of life for those who live here, and a vibrant economy, of which occupancy and average daily hotel rates are only part of the picture.

With the help of our marketing agency Colle McVoy, we continued to iterate on our Stay Wild campaign with the launch of The Wild Rules. This was our second consecutive summer deploying lodging tax dollars to provide alreadybooked and in-market travelers with information on how to visit Jackson Hole successfully. The messaging centered around the importance of planning ahead and how to minimize visitor impact while being good stewards of the environment. Elements included print ads, gas station toppers, social media posts, local influencer blogs, outdoor billboards, and videos, all with a sustainability focus.

The JHTTB enlisted many community partners' help with this effort. A Wild Rules toolkit was created for hoteliers and activity providers to send to their guests in advance of their visit. The toolkit provided templates for emails and social media that businesses could easily customize and share with guests. We worked with the Jackson Hole Airport, the Chamber of Commerce, and Teton County Search and Rescue to create safety videos, the Bridger-Teton National Forest on recreate responsibly campaigns, the Jackson Hole Wildlife Foundation on 'Being Wild,' and Grand Teton National Park on summer traveler research.

We also recognized that local businesses needed help, so we authorized a community marketing stimulus grant process that funded over \$100,000 to kick-start their reopening efforts after the challenges they experienced in the early stages of the pandemic. This was in addition to \$500,500 in events funding.

To formalize our desire to develop a sustainable destination management plan, the JHTTB contracted with George Washington University's International Institute of Tourism Studies and Confluence Sustainability to provide a strategic road map and indicators for destination stewardship for Teton County, which amplifies the community's shared values in ecosystem stewardship, growth management, and quality of life preservation. This collaborative, communitywide effort is the first of its kind for Jackson Hole and is expected to be completed in September 2022 and will act as a road map for the future of tourism in Teton County.

Finding a balance between visitor experience, economic health, and resident lifestyle is crucial to the future of this place we are so fortunate to call home. We appreciate your support of this work and welcome your engagement.

Regards,

Brian Gallagher

TRAVEL & TOURISM AT Work for teton county

\$1.1 BILLION Travel-generated Spending

7,040 Travel-generated Jobs

\$55.2 MILLION TRAVEL-GENERATED TAXES

In fiscal year 2020, Teton County welcomed 1.5 million overnight visitors.

Travelers spent \$1.1 billion, which generated \$55.2 million in state and local tax receipts. Travel-generated tax revenues help support local communities through public services and local infrastructure projects.



If not for the taxes generated by the travel and tourism industry, the average household in Teton County would have paid \$5,771 more in taxes for existing government services.

The 7,040 jobs supported by travel represent 23.4% of Teton County's total private industry employment. Without those jobs, the 2020 Teton County unemployment rate of 6% would have been 29.4%.

SOURCES: DEAN RUNYAN ASSOCIATES, 2020 ECONOMIC IMPACT OF TRAVEL IN WYOMING; U.S. BUREAU OF ECONOMIC ANALYSIS; U.S. BUREAU OF LABOR STATISTICS; WYOMING DEPT. OF REVENUE; WYOMING DEPARTMENT OF ADMINISTRATION & INFORMATION, DIVISION OF ECONOMIC ANALYSIS



TRAVEL AND TOURISM IS WYOMING'S SECOND LARGEST INDUSTRY

Wyoming welcomed 6.9 million overnight visitors, who spent over \$3.05 billion in 2020.

Visitor spending directly affected Wyoming's economy by generating \$160 million in local and state tax revenues, which helps fund jobs and public programs.

Each Wyoming household would have had to pay approximately \$678 more in taxes without the tax revenue generated by the travel and tourism industry.

TRAVEL AND TOURISM IS ONE OF WYOMING'S LARGEST EMPLOYERS

Travelers to the state supported 40,720 jobs in Wyoming, including 28,630 directly in the travel industry and 12,090 in other industries.

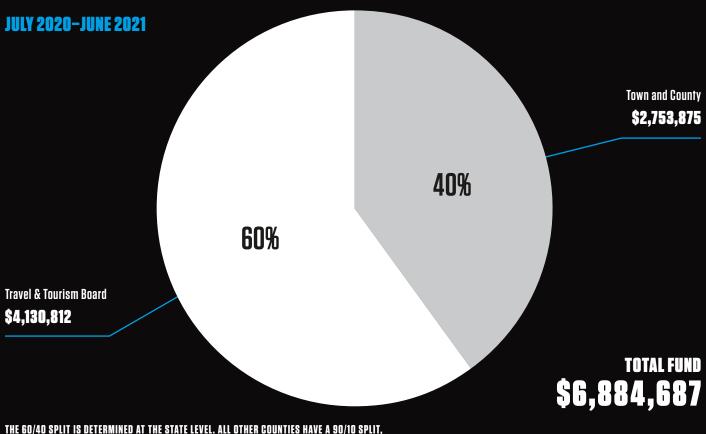
Travel spending generated \$935.2 million in direct payroll and an additional \$609.7 million in other industries.

Travel and tourism supports 7.3% of total employment in Wyoming, or 1 in every 10 jobs.

Leisure and hospitality is the largest employer among all private industries in Wyoming.

Without travel and tourism jobs, Wyoming's 2020 unemployment rate would have gone from 5.8% to 13.1%.

In the State of Wyoming, a 5% lodging tax is collected on overnight stays at hotels, motels, RV parks, campgrounds, guest ranches, rental properties, and other lodging facilities around the state. 3% is remitted to the state and used to fund the Wyoming Office of Tourism and the Wyoming Tourism Board. The remaining 2% stays in Teton County, with 60% of these funds managed by the JHTTB for destination marketing, tourist education, events, and other tourism-related initiatives as outlined in the Wyoming State Statutes. The balance (40%) is managed by the Town of Jackson and Teton County, primarily to mitigate the impacts of tourism on infrastructure and services.



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. These collections are provided by teton county.

WHAT THE LODGING TAX MEANS FOR US

FOR OUR COUNTY

PUBLIC SAFETY

In FY 2021, \$150,000 of the revenue from the lodging tax to Teton County was expended for the general operations of the Jackson Hole Fire/EMS Department. The mission of the Jackson Hole Fire/EMS is the protection of life and property from the adverse effects of fires and medical emergencies, and exposure to manufactured and/or natural dangerous conditions.

PARKS AND RECREATION

In FY 2021, \$355,000 of the revenue from the lodging tax to Teton County was expended for the general operations of the parks and recreation department. This funding provided support for activities including but not limited to snow plowing, trash pickup, and general park cleaning and maintenance.

PUBLIC TRANSPORTATION

In FY 2021, nearly \$832,981 of the revenue from the lodging tax to Teton County supported the general operations of the Southern Teton Area Rapid Transit (START) bus system.

JACKSON HOLE HISTORICAL SOCIETY AND MUSEUM

In FY 2021, \$162,500 of the revenue from the lodging tax to Teton County 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.

GRAND TARGHEE

Teton County granted \$68,000 to Grand Targhee Ski Resort for enhanced public transportation to the resort.

GENERAL FUND

Also, \$465,401 went to the general fund (a 10% share) utilized in many county departments such as sheriff, pathways, and dispatch, and used for general projects geared toward visitor impact.

FOR OUR TOWN

TRANSPORTATION

In FY 2021, roughly 33% of the income received by the town of Jackson through the lodging tax was used to fund the START system.

PUBLIC SAFETY

In FY 2021, \$299,700 of the income received by the town of Jackson through the lodging tax was allocated to this nonrestricted fund.

In FY 2021 \$500,106 of the income received by the town of Jackson through the lodging tax was held in funds for future expenses dedicated to public transportation, public safety, and parks and pathways.



SOUTHERN TETON AREA RAPID TRANSIT (START)

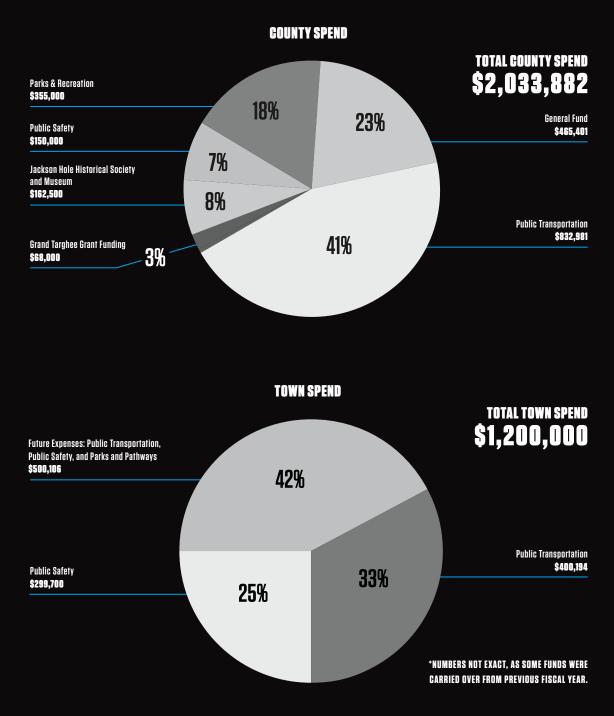


HISTORICAL SOCIETY AND MUSEUM



JACKSON HOLE FIRE/EMS DEPARTMENT

TETON COUNTY AND TOWN OF JACKSON SPENDING*

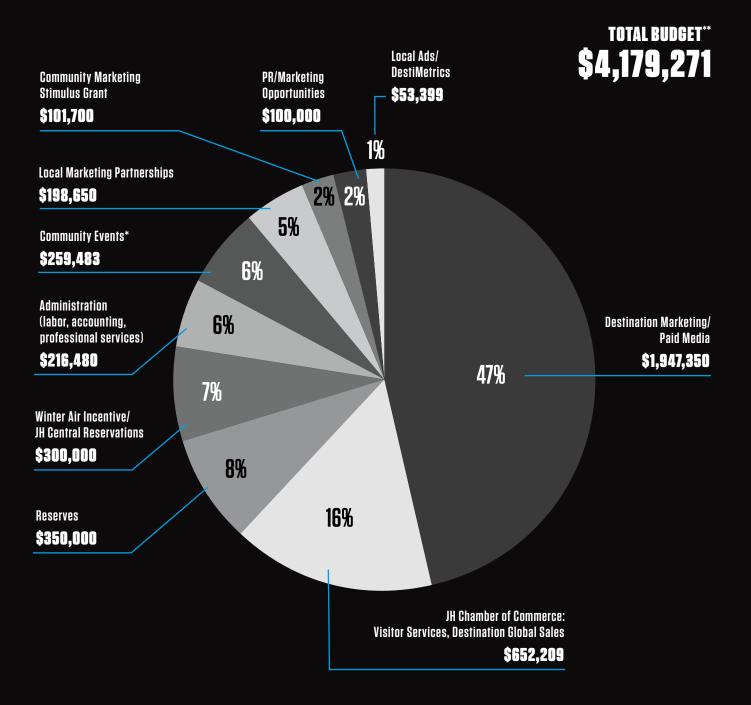


Teton County and the Town of Jackson are responsible for 40% of the funds collected annually from the countywide 2% lodging tax.

The town and county split this 40% based on 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.

FY 2021 BUDGETED Expenses breakdown



* INCLUDES COMMUNITY EVENT LIAISON.

** EXPENSES SLIGHTLY HIGHER THAN COLLECTIONS DUE TO EXCESS COLLECTIONS CARRIED OVER FROM PREVIOUS YEARS.

CHAMBER OF COMMERCE-SUPPORTED SERVICES

In fiscal year 2021, lodging tax dollars were granted to the Jackson Hole Chamber of Commerce to support visitor services, destination sales, and a full-time position event liaison. The total amount granted to the Jackson Hole Chamber of Commerce to support these three areas was \$711,692.

VISITOR SERVICES LOCATIONS

Home Ranch Welcome Center visitors -164,054

Broadway offices visitors -9,688

Jackson Hole Greater Yellowstone Visitor Center visitors -17,986

Jackson Hole Airport visitors – 86,500 (December 10–March 28)

Town Square — Over 300,000 masks were handed out in this location last year. There is no data counter located in the Jackson Town Square. Our operations last summer began June 4 and commenced just prior to the Fall Arts Festival; the dates of operation were dependent on weather and staff available.

Total emails – 29,209 (data captured by ISP counter)

Total phone calls – 17,446 (data captured by Nextiva phone systems analytics)

Vacation packets sent — 3,654, including sustainability practices resource protection message (captured by visitor inquiries spreadsheets)

Masks — Over 1.6 million masks and over 56 cases of sanitizer were provided and distributed through our 260A West Broadway location, which remained open 7 days a week the entire period.

Due to Covid-19 the reduced budget worked out in advance, our visitor services staff were reduced by two full-time year-round staff as well as one part-time seasonal staff.

DESTINATION GLOBAL SALES

Virtual Trade Shows/Sales Missions Attended

GoWestSummit-Virtual~(Fall)~trade~show

Brazil – 4 virtual training webinars with industry partners

Mexico – 3 virtual training webinars with industry partners

Brand USA — Week-long (Fall) virtual trade show with European countries

Brand USA – 2-day virtual (Winter) trade show with Mexico

Brand USA – 2-day virtual (Winter) trade show with Ireland/UK

Go West Summit – Virtual (Winter) trade show

International Travel Bureau – 4-day virtual (Winter) trade show

Global Meeting & Incentive Travel Exchange – Attended physically in May 2021

EVENTS DEPARTMENT

The Chamber of Commerce's Event Liaison coordinates with the Travel and Tourism Board's Event Committee to help process and facilitate community character, sporting, legacy, and large event grants. The event liaison also works with the Marketing Committee to maximize marketing efforts and exposure.



VISITOR SERVICES BOOTH AT JACKSON HOLE AIRPORT



VISITOR SERVICES BOOTH AT THE JACKSON HOLE & GREATER YELLOWSTONE VISITOR CENTER

COMMUNITY MARKETING STIMULUS GRANTS



After Covid-19 impacted local businesses, the JHTTB released its first community marketing stimulus grants. The program awarded over \$100,000 to 14 local businesses to market their reopening and to stimulate Teton County's economy. Campaigns from the community marketing stimulus grant received a combined 8 million+ impressions, hundreds of creative assets, and an estimated \$804,000 put back into Teton County businesses.

BUSINESS	FUNDING GRANTED	FUNDING PAID
IN SEASON WOOD FIRED PIZZA	\$6,600	\$6,100
TURNER FINE ART	\$6,800	\$6,800
JH ADVENTURE RENTALS	\$10,000	\$10,000
AKASHA YOGA	\$8,500	\$8,500
ECOTOUR ADVENTURES	\$8,500	\$8,500
FINE DINING / BISTRO CATERING (\$6,000 EACH)	\$12,000	\$12,000
HOTEL TERRA	\$10,000	\$10,000
SPRINGHILL SUITES / MOUNTAIN Modern (\$5,000 Each)	\$10,000	\$10,000
MADE	\$9,500	\$0
ROADHOUSE BREWING CO.	\$4,400	\$1,300
SNOW KING MOUNTAIN RESORT	\$10,000	\$10,000
ANVIL HOTEL	\$10,000	\$10,000
DISHING MAGAZINE	\$1,000	\$1,000
NEW WEST KNIFEWORKS	\$7,500	\$7,500
TOTAL	\$114,800	\$101,700

EVENTS FUNDED

Thanks to the money collected from the lodging tax, many community and tourism-related events have been partially funded through the JHTTB. These events offer our visitors more things to do and provide them with a glimpse of life in our unique mountain community.

		ALLOCATED	ACTUAL
Jackson Hole Community Fall Festival	JH Farmer's Market	\$1,000	CXL
21st Century Heroes	21st Century Heroes	\$1,000	CXL
Pumpkins on Fire	Art Association of Jackson Hole	\$1,000	CXL
Jackson Hole Marathon Races	JH Racing / Jackson Hole Chamber of Commerce	\$3,500	\$3,500
16th Fall Soccer Classic	Jackson Hole Youth Soccer	\$3,000	\$3,000
Farm to Fork Festival	Slow Food in the Tetons	\$3,000	\$3,000
Winter People's Market	Slow Foods in the Tetons	\$1,000	CXL
Dancers' Workshop	Dancers' Workshop	\$1,000	CXL
Jackson Hole Winter Wonderland	Grand Teton Skating Association	\$1,000	\$1,000
Feathered Fridays	Teton Raptor Center	\$3,000	CXL
WhoDunnit?	Art Association of Jackson Hole	\$2,000	\$2,000
JHSC Early Season Racing	Jackson Hole Ski & Snowboard Club	\$3,000	\$3,000
JHSC Junior Event Racing Series	Jackson Hole Ski & Snowboard Club	\$15,000	\$15,000
5th Annual Free Ski / Snow Bike	Jackson Hole Nordic Alliance	\$5,500	\$1,516
2021 Winter Special Olympics	Special Olympics of Wyoming	\$5,500	CXL
Jackson Hole Food & Wine Winter Fest	Jackson Hole Food & Wine	\$18,500	CXL
Grand Targhee Spring Sessions	Grand Targhee Resort	\$29,000	CXL
Pedigree Stage Stop Sled Dog Race	Pedigree Stage Stop	\$40,000	\$40,000
Jackson Hole Town Downhill & PPP	Jackson Hole Ski & Snowboard Club	\$13,500	\$13,500
World Championship Snowmobile Hill Climb	Snow Devils	\$30,000	\$30,000
YETI Natural Selection Tour	Natural Selection Tour	\$150,000	\$150,000
EcoFair	Energy Conservation Works	\$3,000	CXL
Touch-A-Truck	Jackson Hole Children's Museum	\$3,000	\$3,000
Powwow	Central Wyoming College	\$10,000	CXL
Million Dollar Music Fest	Silver Dollar Inc.	\$50,000	\$50,000
Northern Indigenous Arts and Cultures Festival	Wind River Foundation	\$8,500	CXL
Old West Days	Jackson Hole Chamber of Commerce	\$45,000	CXL

TOTAL ALLOCATED SPEND \$450,000

total spent \$318,516 (After <u>cancellations</u>)

FALL TOTAL \$12,500 / \$9,5000

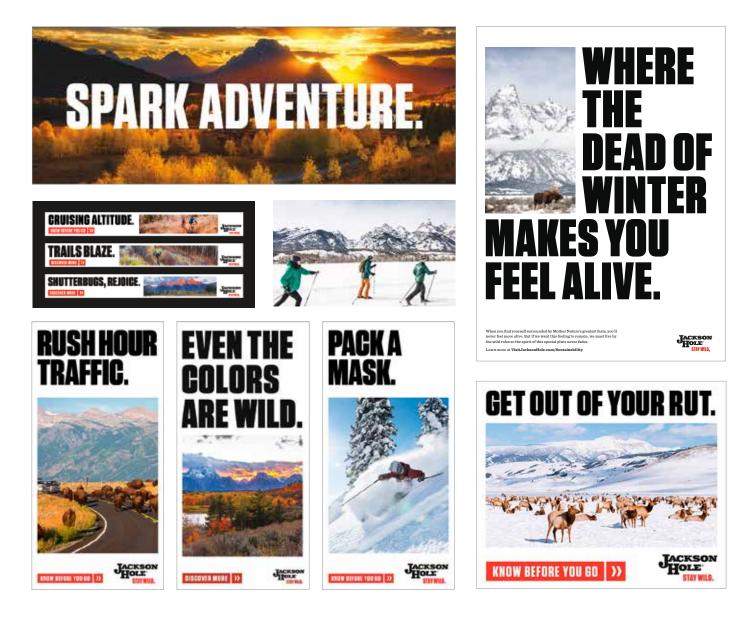
WINTER TOTAL \$318,000 / \$256,016

SPRING TOTAL \$119,500 <mark>/</mark> \$53,000

MANY EVENTS WERE CANCELLED DUE TO COVID-19.

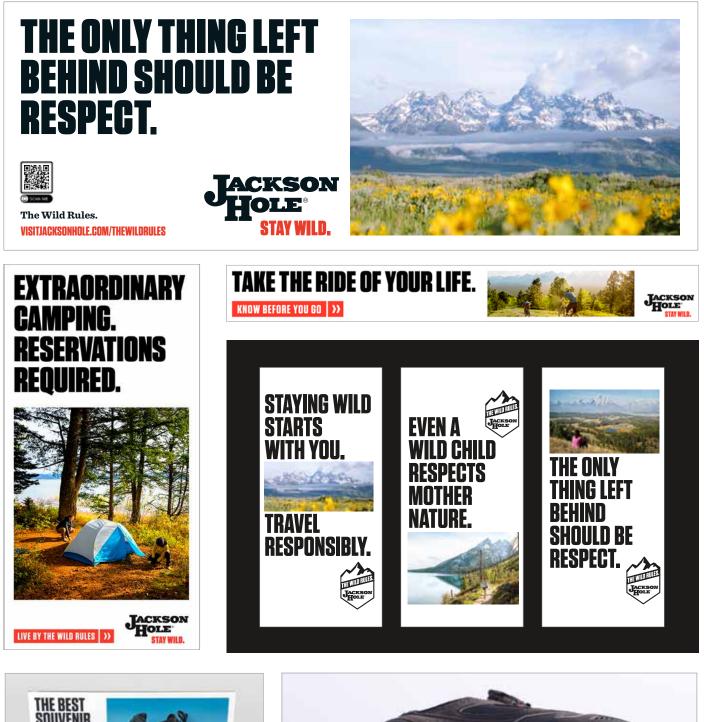
CAMPAIGN VISUALS & STATS

Fall/Winter 2020–2021 Campaign





The date range for this annual report is 7/1/20-6/30/21, but when we look back on this time, it marks a significant shift in our strategy. Our marketing took a reduced seasonal travel approach, focusing less on increasing travel (push) during the fall, winter, and spring seasons and focusing more on educating people who were actively planning, booking, or traveling to the destination with messaging about safety, sustainability, and how to travel responsibly to better manage the destination.







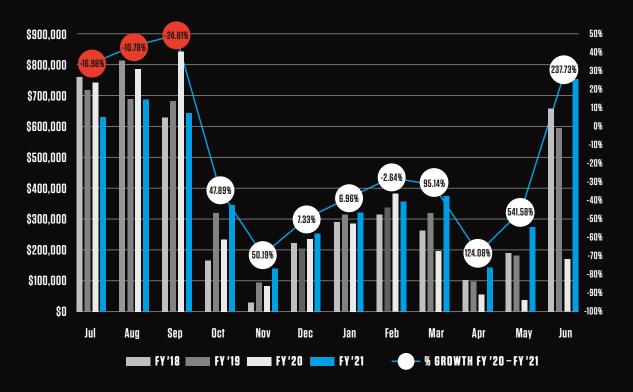


SUMMER SUSTAINABILITY CAMPAIGN. SEE MORE HIGHLIGHTS ON PAGES 14-15.

LODGING TAX RECEIPTS

Month	FY '18	FY '19	FY '20	FY '21	% Growth FY '17–FY '18	% Growth FY '18–FY '19	% Growth FY '19–FY '20	% Growth FY '19–FY '21
July	\$756,692.47	\$716,556.41	\$748,540.87	\$621,405.15	8.87%	-5.30%	4.46%	-16.98%
August	\$808,700.01	\$695,339.54	\$780,037.15	\$695,976.34	23.91%	-14.02%	12.18%	-10.78%
September	\$631,843.45	\$682,496.27	\$847,088.44	\$636,968.10	11.15%	8.02%	24.12%	-24.81%
October	\$162,461.40	\$321,445.04	\$230,259.39	\$340,534.23	17.86%	97.86%	-28.37%	47.89%
November	\$39,833.63	\$89,904.71	\$80,786.32	\$121,336.76	38.95%	125.70%	-10.14%	50.19%
December	\$225,544.01	\$204,404.67	\$231,383.75	\$248,344.51	-2.86%	-9.37%	13.20%	7.33%
January	\$289,662.30	\$308,278.95	\$286,428.74	\$306,369.22	31.07%	6.43%	-7.09%	6.96%
February	\$311,313.63	\$341,078.00	\$378,096.17	\$368,116.43	37.61%	9.56%	10.85%	-2.64%
March	\$262,295.72	\$318,747.78	\$195,108.64	\$380,739.65	10.37%	21.52%	-38.79%	95.14%
April	\$101,285.99	\$95,625.76	\$64,086.17	\$143,605.03	210.74%	-5.59%	-32.98%	124.08%
May	\$194,369.92	\$185,656.58	\$45,164.94	\$289,768.90	-2.28%	-4.48%	-75.67%	541.58%
June	\$658,053.09	\$592,641.44	\$222,251.87	\$750,611.73	7.28%	-9.94%	-62.50%	237.73%
Total	\$4,442,055.62	\$4,552,175.15	\$4,109,232.45	\$4,903,776.05	15.54%	25.00%	-\$9.73%	19.34%

Lodging Tax Receipts*

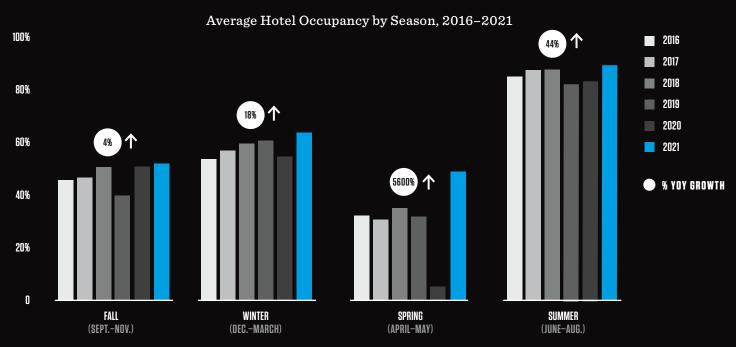


RED INDICATES IMPACT FROM COVID-19.

* THESE COLLECTIONS REFLECT A TWO-MONTH LAG TIME IN FUND BALANCE.

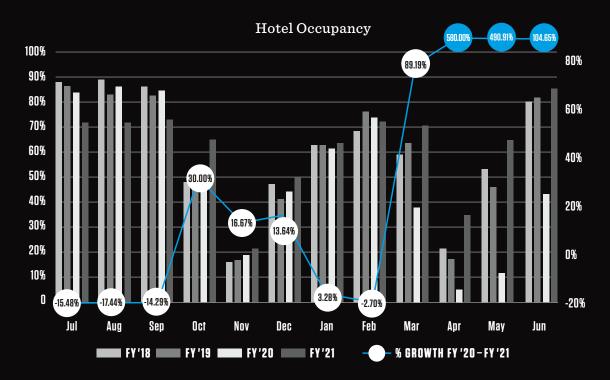
Jackson Hole is more than a destination. We're a community, and our ultimate goal is to create a sustainable economy where families can live yearround. Tourism is a big part of our economy, but tourism needs to be consistent and manageable.

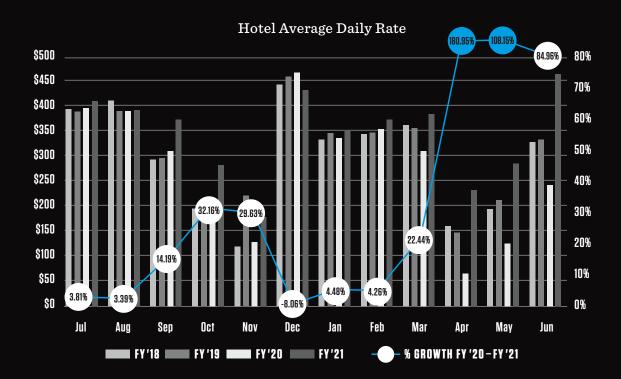
The JHTTB continued Covid-19 safety messaging from the previous year, but as vaccines became available and cases were on the decline, the JHTTB changed the communications strategy to include "Know Before You Go" messaging to inform visitors about things such as the Grand Teton National Park reservation system, advanced planning, and recreating responsibly. Messaging that focused on The Wild Rules included sustainable tourism tips and suggestions. As anticipated and shown below, visitation numbers were record-setting.



SOURCE: DESTIMETRICS

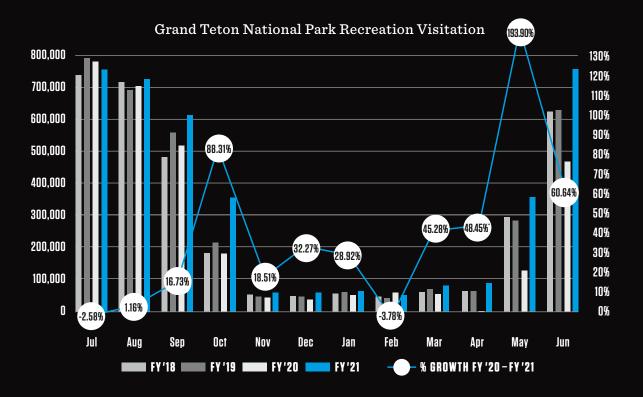
HOTEL OCCUPANCY AND AVERAGE DAILY RATE

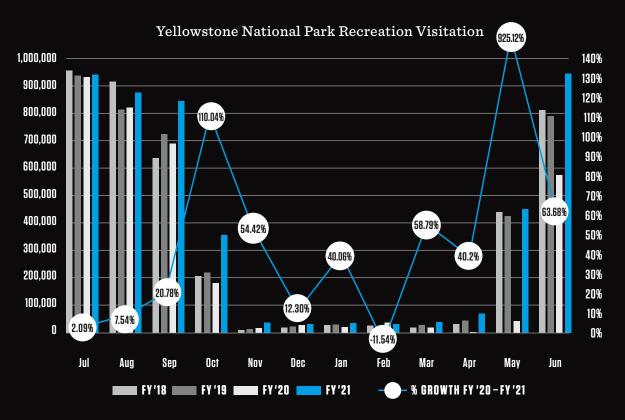




SOURCE: DESTIMETRICS

NATIONAL PARK VISITATION



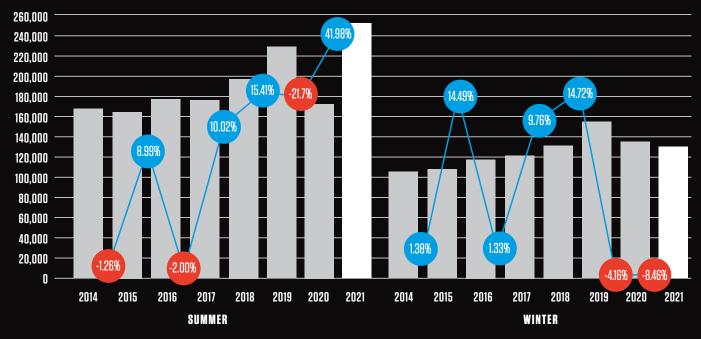


^{*}REPRESENTS % GROWTH FY '19 - FY '21. NATIONAL PARKS WERE FULLY CLOSED APRIL 2020 SEEING O VISITORS. Both grand teton and yellowstone national parks experienced record visitation in 2021. Source: National Park Service's integrated resource management applications

INBOUND PASSENGERS By Season



12 NONSTOP FLIGHTS FROM AROUND THE COUNTRY

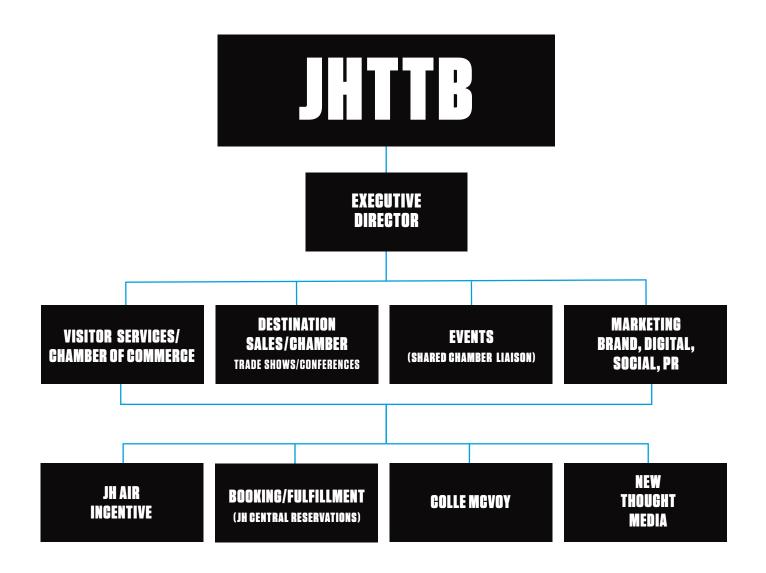


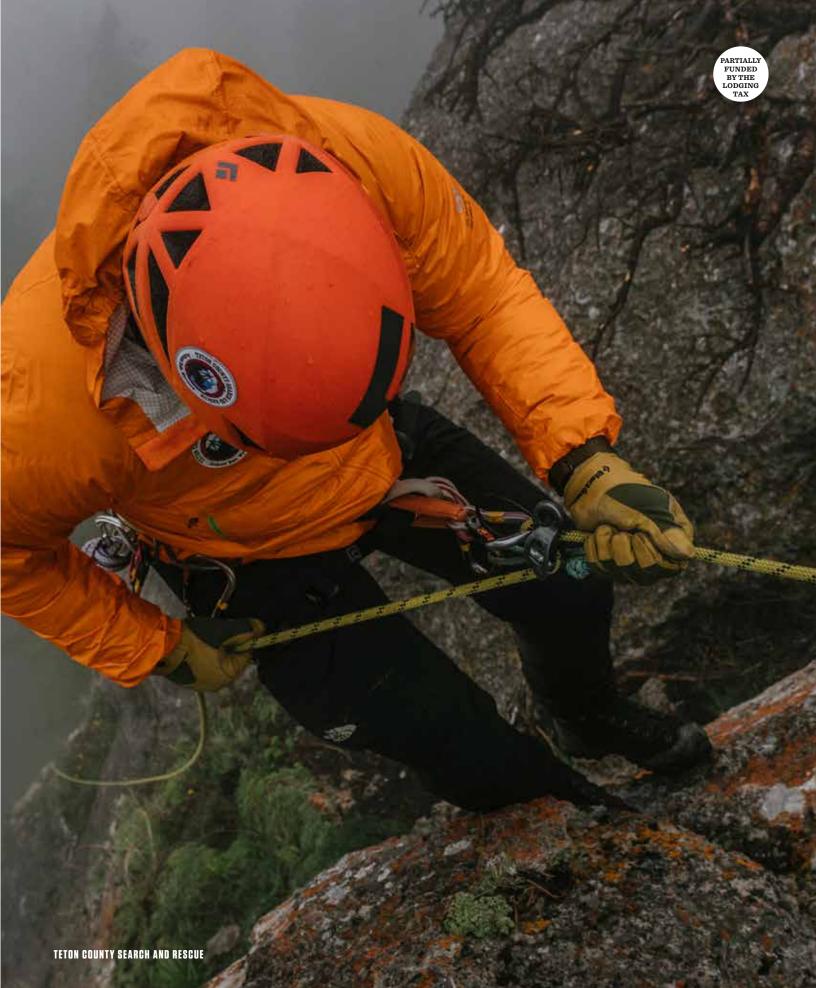
Inbound Passengers at Jackson Hole Airport

NOTE: WINTER IS FROM DECEMBER TO MARCH. SUMMER IS FROM JUNE TO AUGUST. Source: Jackson Hole Airport

OUR PARTNERS

The JHTTB 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.





HELP SHAPE TOURISM IN THE TETONS.

If you live or work in the Tetons, you know how tourism is impacting our way of life. That's why the Jackson Hole Travel & Tourism Board (JHTTB) is spending the next few months listening to the community to create an action plan that will help better manage the impacts of tourism.

Learn more about the plan, stay involved, and voice your opinion at VisitJacksonHole.com/Locals.

JACKSON HOLE TRAVEL AND TOURISM BOARD MEMBERS FY 2021

BRIAN GALLAGHER

Joined the Board in 2016 Chairman CityPASS

WILLI BROOKS

Joined the Board in 2017 Center for the Arts

CORY CARLSON

Joined the Board in 2017 Vice Chairman Four Seasons Resort and Residences Jackson Hole

CRISTA VALENTINO

Joined the Board in 2017 Current Consulting

ERIK DOMBROSKI

Joined the Board in 2018 Treasurer The Yarrow Group

JOE MADERA

Joined the Board in 2019 In Group Hospitality

BRIAN MODENA

Joined the Board in 2016 Secretary TMBR Creative Agency

JACKSON HOLE TRAVEL AND TOURISM BOARD MEMBERS Support

KATE SOLLITT

Executive Director

MARK BARRON

Teton County Board of County Commissioners

BRITNEY MAGELBY

Event Liaison Jackson Hole Chamber of Commerce

ARNE JORGENSEN

Town of Jackson Vice Mayor Town Council Member

KEITH M. GINGERY

Chief Deputy County Attorney Teton County and Prosecuting Attorney's Office

BRET LINSENMANN

L & L, PC Certified Public Accountant

PARTNER ORGANIZATIONS

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





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