

FY2017 ANNUAL REPORT



WHY THEY COME

Visitor intercept surveys and focus groups will help determine marketing message

Cody's authentic Old West spirit brings travelers year after year to the area at the east doorstep to Yellowstone National Park. The big motivator for visitors to Park County is its gateway connection to Yellowstone Park. Seasoned visitors to the West also cite the attractions of outdoor activities; camping, hiking, fishing, skiing, rafting and mountain biking, as well as the mountain scenery and wildlife viewing.

And no surprise, the attractions of rodeo, museums and the opportunity to learn history of the West rank high with travelers. Getting into the minds of visitors to Park County informs the Park County Travel Council of how to tailor its advertising efforts for maximum results. Research was conducted on a couple of fronts last year. About \$50,000, some 3 percent of its advertising budget, was spent by the Travel Council on two comprehensive research projects.

The first was a visitor intercept study conducted at various locations in Cody and Yellowstone National Park from June through September.

- All visitors would recommend a Cody/Yellowstone trip to others and 98 percent were satisfied or very satisfied with their overall visit.



Photo: Meg Summers

- Average income showed 49 percent earned over \$100,000 annually which will grow as baby boomers continue to work and travel.
- The top five states of origin in 2016 were (in order) California, Texas, Colorado, Washington and Minnesota.
- There was a four percent increase in overseas visitors (10 percent in 2016 and six percent in 2005). While England, France and Germany remained the top three, 10 more countries appeared in 2016.
- 37 percent of visitors flew on a portion of their trip in 2016, a 10% increase over 2005.

Focus Groups

The second project involved focus groups in Salt Lake City, Utah and Denver, Colorado. Participant groups in each city included those who had visited Cody previously and those who had not. Their responses in 90-minute sessions help craft strategies for the Travel Council's summer marketing campaign in out-of-state markets.

- Most participants vacationed one to five times a year.
- Online research was used nearly universally to gather information about locations, attractions and transportation logistics.
- For families, the mom is typically the final vote for decision making. Teens exert significant influence over locations and activity decisions. Childless couples plan together and have a separate set of priorities.
- Budget and schedule are two significant barriers while vacation planning.
- All participants had vacationed in many western towns/cities. Motivations for visiting these towns and cities were almost completely driven by outdoor activities such as camping, hiking, fishing, skiing, rafting and mountain biking. Additionally many appreciated the scenery and nature. Other

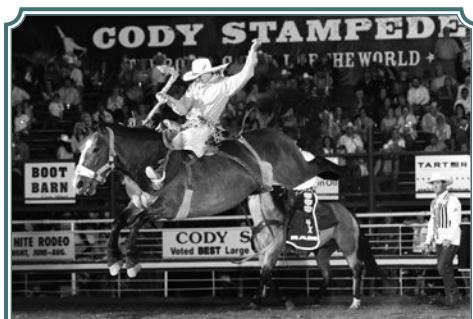
motivators included a museum, learning history and all about the West.

- The most frequently mentioned and strongest reason for a Cody visit is that it was on the way to Yellowstone – followed by rodeos, fishing, hiking, rafting and observing wildlife.
- Jackson Hole was mentioned most frequently when participants were asked to compare Cody with other destinations in the region. These two locations were portrayed as virtually polar opposites by those familiar with both.

Among participants who had not visited Cody, Cody's 30-second video intrigued them and many reported wanting to know more about Cody and planned to do more research later.

- The biggest barrier for non-visitors was the proximity to Yellowstone. While those who had visited Cody found the drive reasonable, non-visitors were disappointed to hear that it was 54 miles from Yellowstone and felt that was too far to be a convenient gateway.
- The Salt Lake City group felt Cody seemed out of the way and added considerable time to their drive time.
- Participants who did not have children felt that advertising promoted Cody as a family-centric location with limited options for adult activities.

The positive attitudes and perceptions of Cody among participants who had visited were very high. While discussing Cody, group members noticeably became more energized and excited. Both groups who visited Cody used similar language to describe the town and their experiences. Cody was "quaint, down to earth, authentic with the real western experience, true small-town experience with friendly and inviting locals, rich in history with top-rated museums and fun for the entire family."



Media and Travel Trade Highlights

The PCTC office provides information and helps coordinate individual visits from national and international travel writers, photographers, tour operators and travel industry representatives. These visits to Cody and the area resulted in published

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...Trade Highlights

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and online articles as well as travel brochures and catalogs. The Wyoming Office of Tourism, the PCTC public relations team - Mesereau Travel Public Relations and the office of Rocky Mountain International rely on support from the PCTC office to host and escort these important guests.

- Articles about Buffalo Bill's Cody/Yellowstone Country were published in 14 magazines, 10 metropolitan newspapers and 21 additional online sites.
- 29 travel industry representatives from 12 tour companies or travel agencies from six different countries were hosted.
- Cody and Park County were featured in several travel guides: Brand U.S.A. Inspiration Guide, AAA TourBook, and Billings, Jackson, Rapid City and Salt Lake City guides.
- In cooperation with the Wyoming Office of Tourism, Rocky Mountain International (RMI) and other marketing organizations, 8 travel writers from the U.S. and Canada were hosted. Writers represented a variety of newspapers, magazines and online publications.
- PCTC assisted TV production staff in filming "Temporary Australians".

Local Partners

The Park County Travel Council could not host and assist as many media groups as we do without the continued support of local businesses. This support – donated lodging, meals and admissions – allows the Travel Council to spend more on advertising, partnerships and transportation for travel writers and television crews. Members of the council understand that these donations cost businesses and truly appreciate their cooperation.

Special thanks to Yellowstone National Park Lodges, the Buffalo Bill Center of the West, Cody Nite Rodeo, Cody Stampede Board, Cody Firearms Experience, Cody Trolley Tours, Dan Miller's Cowboy Music Revue, Old Trail Town, Heart Mountain Interpretive Center, Sleeping Giant Ski Resort and Zipline, Blair Hotels, The Cody, Best Western Ivy Inn & Suites, Best Western Sunset Inn, The Irma Hotel and Restaurant, The Chamberlin Inn, and Buffalo Bill's Antler Inn – a few of our 2016/17 partners.

2016/17 Park County Travel Council

John Wetzel, Chairman
City of Powell Appointee

John Parsons
Vice Chairman
Park County Appointee

Sandy Newsome
Treasurer
City of Cody Appointee

Mike Darby, Secretary
Park County Appointee

Sherry Long
Town of Meeteetse Appointee

Sarah Bierschwale
Park County Appointee

Stan Wolz
City of Cody Appointee

Dave Bonner
City of Powell Appointee

Debbie Millard
Park County Appointee

Ted Blair
State Tourism Board
Representative Appt.

PCTC Helps Communities Promote Themselves

The Park County Travel Council markets Park County in its entirety under the name of "Buffalo Bill's Cody/Yellowstone Country," which includes the communities of Cody, Powell, Meeteetse, and East Yellowstone Valley.

In addition to this marketing, individual communities and non-profit organizations within Park County are granted matching grants to purchase their own advertising.

Awarded grants can only be used for advertising and promotion outside Park County. Most Chamber of Commerce grants also include partial funding for visitor/information centers.

Because Yellowstone National Park is not eligible for grant money, the park's collections are used to enhance the grants awarded to each community and to fund the marketing plan. Usually, the PCTC helps fund from the marketing budget some sort of promotion for Yellowstone National Park Lodges/Xanterra. In June 2017 a summer press tour was hosted by Cody/Yellowstone Country. PCTC paid travel

expenses for all participants and coordinated activities for the group. The writers entered Yellowstone Park through Cody's east entrance, overnighted at Lake Hotel, toured the new lodges at Canyon and exited Yellowstone Park through the northeast entrance to return to Cody. This press tour allowed Cody/Yellowstone to tout our county attractions and activities as well as our easy access to two Yellowstone gateways.



Many Park County conventions, events and sport tournaments received sponsorships from the Park County Travel Council. Over \$5,000.00 was awarded in sponsorships to events such as the Cody Country Car Show, Yellowstone Fire Soccer, Meeteetse Mountain Run Classics, Cody Concerts in the Park, Cody Ice Festival, Wyoming Outdoorsmen and many others.

Park County Travel Council Administration and Budget

The role of the Park County Travel Council is to administer the 4% Park County lodging tax revenues with the exception of the 10% share returned to the Park County Treasurer. State statutes dictate the revenues be spent on tourism promotion only.

The Park County Travel Council is a Joint Powers Board comprised of ten volunteer board members. Four members are appointed by Park County Commissioners, two by the Cody City Council, two by the Powell City Council and one by the Meeteetse Town Council. A representative from the Wyoming Tourism Board or a designee, is also on the Travel Council.

Budgets created and approved are funded by the previous year's lodging tax revenue.

Claudia Wade, marketing director of the Park County Travel Council, is responsible for implementing and/or overseeing a variety of marketing strategies for Park County.

Wade assists in the selection of publications for advertising buys, coordinates visits and escorts media and travel industry representatives, assists in the development of display ads and brochures, coordinates all television promotions and features, works closely with the public relations team generating press releases and weekly blogs.

Claudia also represents Park County at trade and travel shows in the U.S. and Europe, acts in an advisory capacity regarding funding and administers all PCTC grants.

New in the PCTC office is Amanda Coyle, administrative assistant. Amanda tracks and fulfills all visitor information requests including bulk mailing to visitor centers and AAA travel offices. She maintains printed and digital data for the Group Travel Planner, Press Guide, Facilities Inventory, and the PCTC website www.yellowstonecountry.org. Amanda is also responsible for the annual updating and printing of the insert in the Buffalo Bill's Cody/Yellowstone Country Vacation Guide insert and updating all PCTC printed brochures – Historical Attractions Guide, Scenic Drives, and the Guest & Dude Ranch Directory. Coordinating the PCTC rack card distribution for Park County non-profits and preparing materials for board meetings and work sessions are also part of her duties.

You may recognize this logo. In order for grantees to be reimbursed for their advertising expenses, it must appear on all printed ads, TV commercials and other promotional materials. This logo also appears in printed programs and at facilities that host sporting events which are funded in part by the Park County Travel Council.



Financial Statement FY17 Ending 6/30/17

Cash in Bank 6/30/2017 \$1,703,824.73

REVENUES:

FY17 Lodging Tax Gross Receipts	\$2,486,370.13
Less Revenues to Park Co./Cities	<u>\$248,637.01</u>
Net FY2017 Lodging Tax Collections	\$2,237,733.12*
Co-Ops/Refunds	\$37,170.81
Interest Received	\$3,890.06
TOTAL REVENUE	\$2,278,793.99

EXPENSES:

Cody, Powell, Meeteetse	
East Yellowstone Specific 2017	\$235,206.91
Park County Marketing Plan 2017	\$1,469,768.12
Administration 2017	\$178,483.57
Attractions 2017	\$134,627.47
Advertising Co-Ops	\$19,840.85
TOTAL EXPENSES	\$2,037,926.92**

* Reserved for FY2018 Budget

**Funded from FY2016 Lodging Tax Collections, Interest and Co-op Revenue

2016 Grants/Programs Funded by 2015 Lodging Tax Collections

GRANTS COLLECTIONS

CODY COLLECTED \$1,245,355.65

Cody Country Chamber of Commerce	\$122,000.00
Visitor Center	\$115,000.00
Spring Into Yellowstone	\$5,000.00
Color Dash	\$2,000.00
Buffalo Bill Center of the West	\$32,000.00
Buffalo Bill Dam & Visitor Center	\$6,825.00
Cody Stampede Board	\$27,500.00
Museum of the Old West	\$2,350.00
Wild West Paddle Club	\$5,000.00
Yellowstone Quake, Inc.	\$3,000.00
TOTAL CODY GRANTS	\$198,675.00

POWELL COLLECTED \$60,956.07

Powell Valley Chamber of Commerce	\$63,000.00
Visitor Center	\$45,000.00
Event/Marketing Grant	\$18,000.00
Heart Mountain Interpretive Center	\$19,000.00
TOTAL POWELL GRANTS	\$82,000.00

MEETEETSE COLLECTED \$4,083.19

Meeteetse Visitor Center	\$30,000.00
Visitor Center Staffing	\$14,000.00
Event/Marketing Grant	\$15,000.00
Website Upgrades	\$1,000.00
TOTAL MEETEETSE GRANTS	\$30,000.00

PARK COUNTY COLLECTED \$269,244.72

East Yellowstone Valley Chamber of Commerce	\$55,000.00
Yellowstone Recreations Foundation	\$33,500.00
Yellowstone Regional Airport	\$15,000.00
Wyoming Disabled Hunters	\$2,700.00
TOTAL COUNTY GRANTS	\$106,200.00

YELLOWSTONE NATIONAL PARK COLLECTED \$630,000.00

(YNP lodging located in Park County only)
Yellowstone is not eligible for PCTC Grants \$0.00

TOTAL GRANTS \$416,875.00

UNIFIED MARKETING \$1,469,855.00

ADMINISTRATION \$180,055.00

TOTAL GRANTS & PROGRAMS \$2,066,785.00

Communities, County Use Lodging Tax Dollars

Park County collected \$24.4 million in sales taxes in 2016. Over 38% of those taxes, \$9.4 million, was generated by travelers. These travel generated taxes relieved the tax burden on Park County residents.

Park County residents benefit from the lodging tax in another way. Park County and its municipalities receive 10 percent of the Park County Lodging Tax collected. The collections are distributed by the Park County Treasurer back to the communities and county at the same ratio they were collected. Example: City of Cody collected \$1,276,588.00 and received \$127,659.00 from the County Treasurer. There is no restriction on how this 10 percent can be spent.

In 2016, a total of \$241,342.00 was returned to Park County for distribution to the City of Powell, the City of Cody, the Town of Meeteetse and Park County.

The City of Powell received approximately \$6,068.00 that was earmarked for advertising for Powell's Country Christmas event.

The City of Cody received approximately \$127,659.00 that was set aside for special projects as needed. Funds were awarded to Boys and Girls Club of Park County, Bright Futures Mentoring Program, Forward Cody Wyoming, Inc., Cody Stampede Parade Committee, Cody Skylighters, Cody/Yellowstone Air Improvement Resources, Cody Council on Aging, and Olive Glenn Golf Course & Country Club.

Approximately \$283.00 was received by the town of Meeteetse. This was added to the town's general fund.

Park County is entitled to the portion of the funds that are collected outside Park County municipalities. These properties are guest and dude ranches and Yellowstone National Park lodging that is located in Park County. In 2016, over \$120,472.00 was added to Park County's general fund and used at the discretion of the county commissioners.

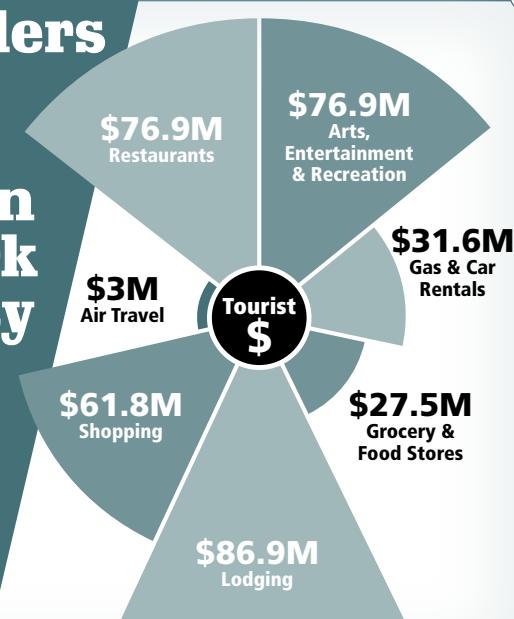
...Research Reveals continued from Page 1

The group members familiar with Cody sincerely expressed that the town and its people were truly authentic. Those not familiar with Cody expressed a desire for such a relationship.

The information gathered from the visitor intercept study and focus groups will be shared with all Travel Council vendors so we can enhance our messaging and address negative feedback with effective future marketing strategies.

**Travelers
Spent
\$363.9
Million
in Park
County
in
2016**

Source:
2016 Dean Runyan
Assoc. Report



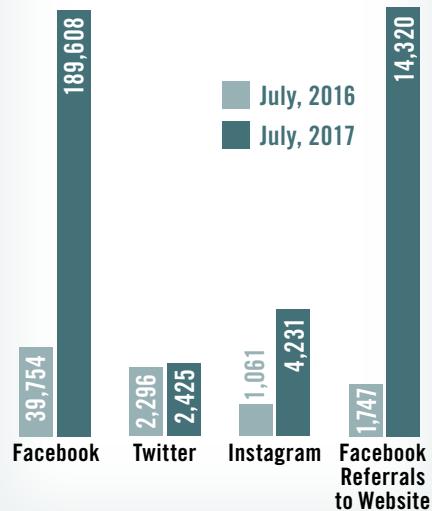
The Park County Travel Council and Social Media

Social networking is a critical tool when it comes to raising awareness about the experiences of a vacation to Buffalo Bill's Cody/Yellowstone Country. The Park County Travel Council posts twice daily on Facebook, Twitter and Instagram. Most of our posts come from user-generated imagery. This type of authentic photography resonates with visitors and allows them to picture themselves in our backyard. Our followers find information on upcoming events, interact with questions related to this region, and share pictures and stories. Be sure to follow us – we're listed as *Cody/Yellowstone Country* on Facebook, *Cody/Yellowstone* on Twitter and *codyyellowstone* on Instagram.

Since 2010 our weekly travel blog, "Corrie N. Cody" at www.yellowstonecountry.org has encouraged readers to explore Cody/Yellowstone Country.



Our Social Media Audience Has Grown!



Park County Travel Council

FY2017 Annual Report
P.O. Box 2454 – Cody, WY 82414
www.yellowstonecountry.org

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POSTAL PATRON

Year-Round Marketing

The Park County Travel Council has been implementing a marketing plan for five years that includes some sort of Cody/Yellowstone promotion throughout the entire calendar year. The council's primary goal is to extend the traditional summer season into the fall and bolster winter visitation.

JANUARY – JUNE STATISTICS COMPARISON

	2015	2016	2017
Inquiries*	71,557	58,531	55,853
PCTC Website Hits*	155,807	134,697	208,364
Buffalo Bill Center of the West	55,464	53,108	58,114
YNP East Entrance	154,621	160,138	158,606
Cody Nite Rodeo (June Only)	29,827	30,550	25,804
BB Dam & Visitor Center (May & June)	25,819	26,880	31,409
Heart Mtn. WWII Interpretive Center	4,933	5,732	5,750

*Numbers vary depending on launch date of paid campaigns

A vacation guide is produced and mailed to people who request a printed Buffalo Bill's Cody/Yellowstone Country guide. However, trends indicate more people would rather get vacation information online. Marketing efforts direct inquiries to the website where users can download a vacation guide or plan their trip on-line. Providing www.yellowstonecountry.org as an information source better engages the user, is cost effective and offers more current information.

The Travel Council recognizes that events can be an easy way to increase visitation. Events are helped through Sponsorship Requests for advertising outside Park County. The length of the event, time of year and potential to generate overnight stays are all considered by the Travel Council when awarding sponsorships. These sponsorships do not require that the organization be non-profit.

School affiliated activities are also eligible to receive sponsorships from the PCTC. School events must be regional or statewide tournaments or activities and can receive up to \$200/day.

2016 PARK COUNTY VISITOR STATISTICS

2016 Year/Season End Numbers Change From 2015

Total Inquiries (including website)	348,957	- 4%
Buffalo Bill Center of the West	172,244	- .6%
Cody Nite Rodeo	90,891	- 2%
Buffalo Bill Dam Visitor Center	84,356	+ 8%
Heart Mountain Interpretive Center	14,935	+ 5%
Yellowstone National Park	4,257,364	+ 3%
<i>East Entrance</i>	529,982	+ .5%
<i>NE Entrance</i>	228,042	- 1%
YRA-Enplanements	40,288	+ 21%
Cody Chamber Visitor Center* (June–December)	85,008	- 3%
Powell Chamber Visitor Center**	5,095	- 10%
Meeteetse Visitor Center**	4,594	+ 17%

*Visitor Center automatic counter out of order Jan.-May

** Visitor Center walk-in numbers are tracked by staff to the best of their ability.