

History & Impact







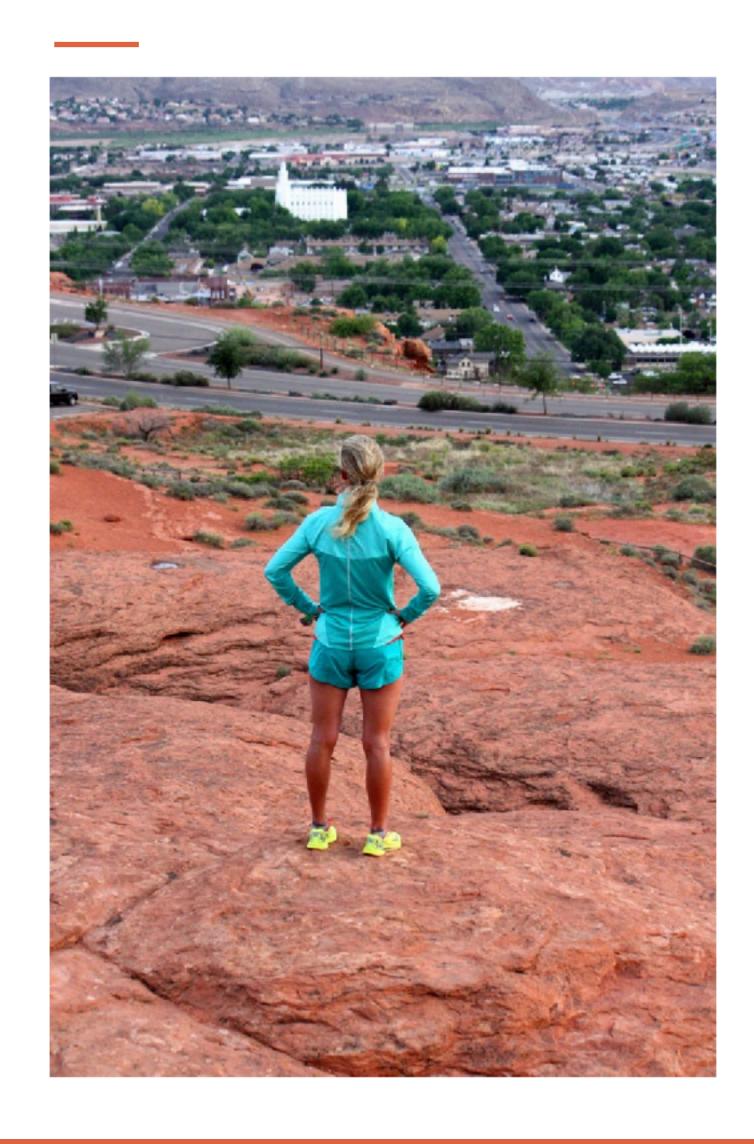
Infrastructure Investment

- DSU Human Performance Center
- Springdale Beautification
- Snake Hollow Bike Park





Major Contributors



- \$82M SPORTS
- \$73M ARTS & ENTERTAINMENT
- \$63M CONVENTIONS
- \$62M INTERNATIONAL
- \$57M GOLF

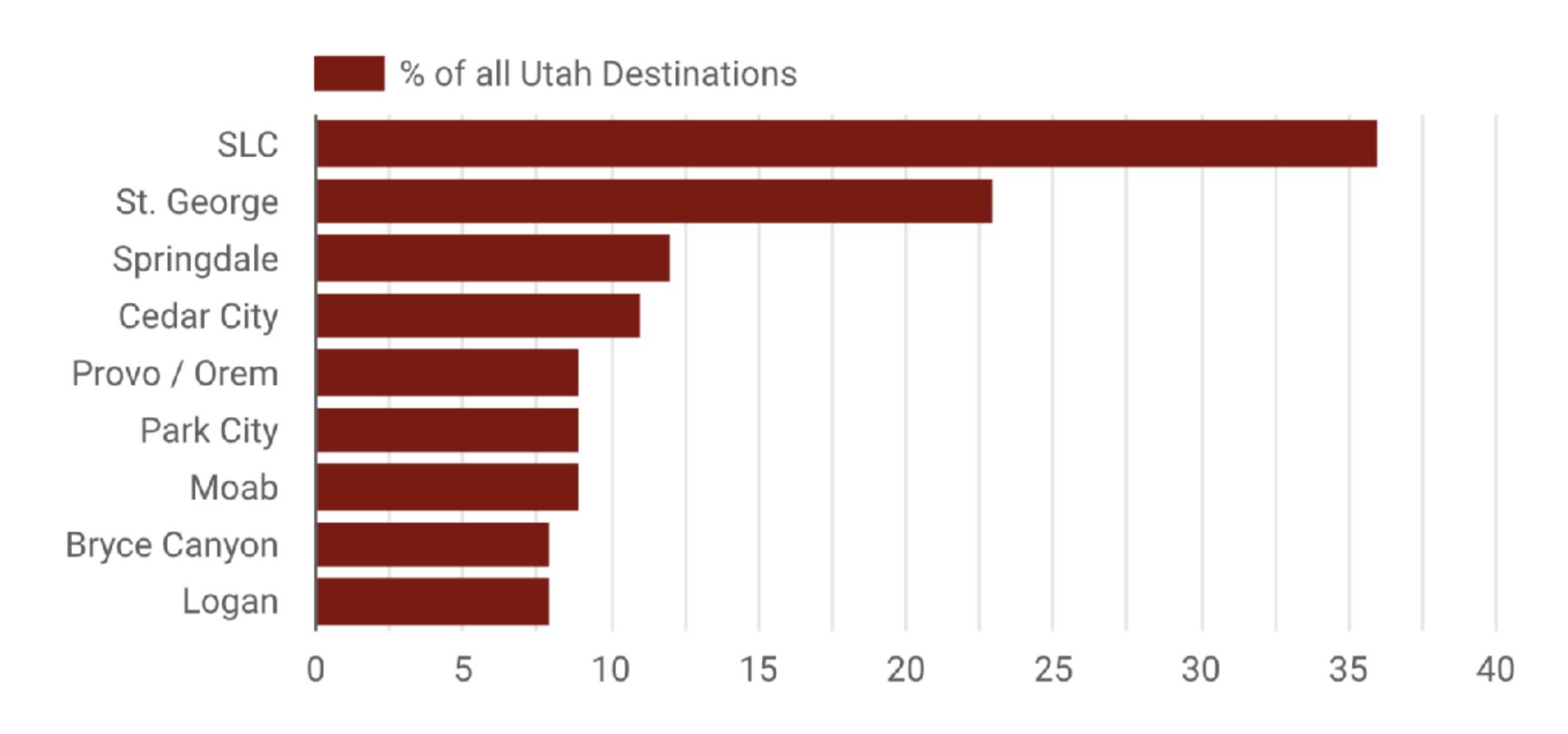
Visitation



- ZION 4.3M
- SAND HOLLOW 663K
- QUAIL 128K
- SNOW CANYON 277K
- GUNLOCK 38K
- TUACAHN 210K

Visitation

35% of out of state visitors spend time in St. George & Springdale



Walton Foundation Study

30 Most Dynamic Metropolitan Areas (June 2019)

"Metrics show an economy that has capitalized on tourism"

"Tourism draws have become labor draws"

"Local govts are using [tourism assets] as a way to improve quality of life for residents"

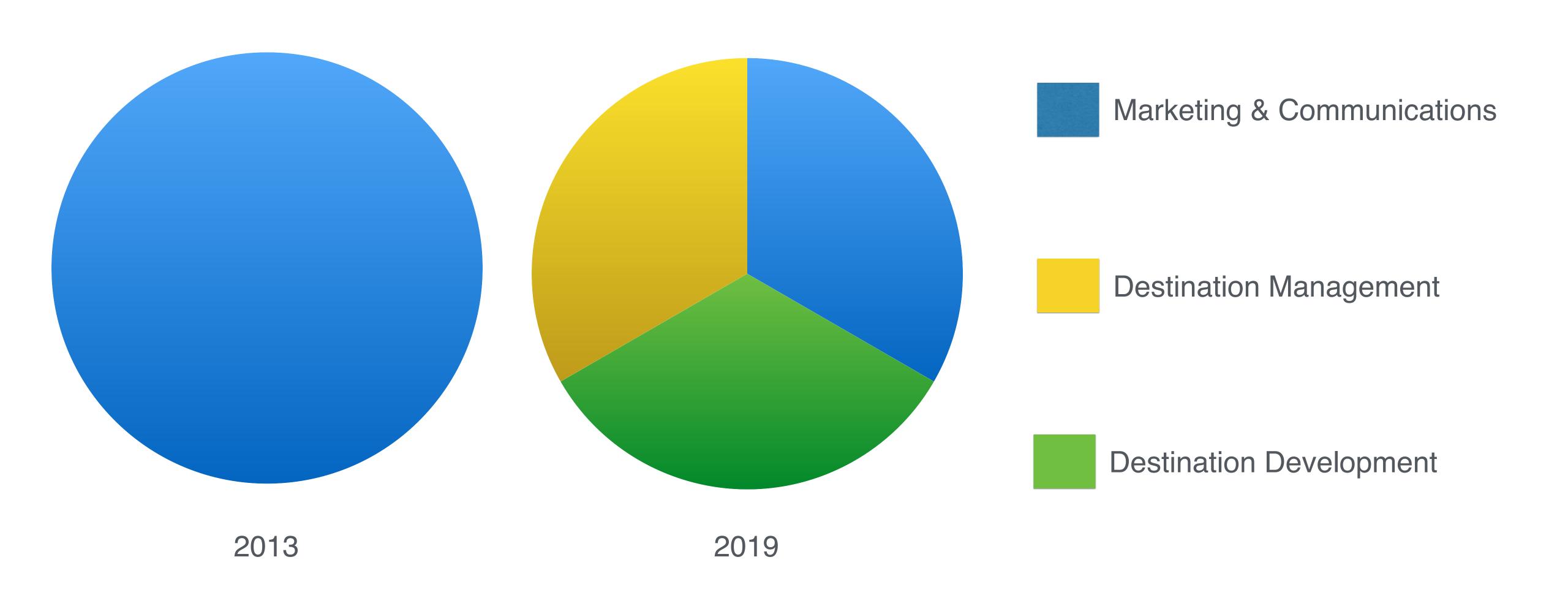
"Growth has come from all age groups as they seek the metro's unique natural amenities"

"Creating an ecosystem with the potential to become the nation's next great tech hub"

Tourism Organization

- Part of State Economic Development
- Funded by Taxes to Visitors
- · Legislated to Market & Invest
- · Operated by Counties

Tourism Office Roles



Tourism Office Roles

Comprehensive marketing & advertising strategies Interaction will all tourism related entities throughout the county Oversight & leadership for county tourism related facilities

- Dixie Center
- Legacy Park
- Shooting Sports Park

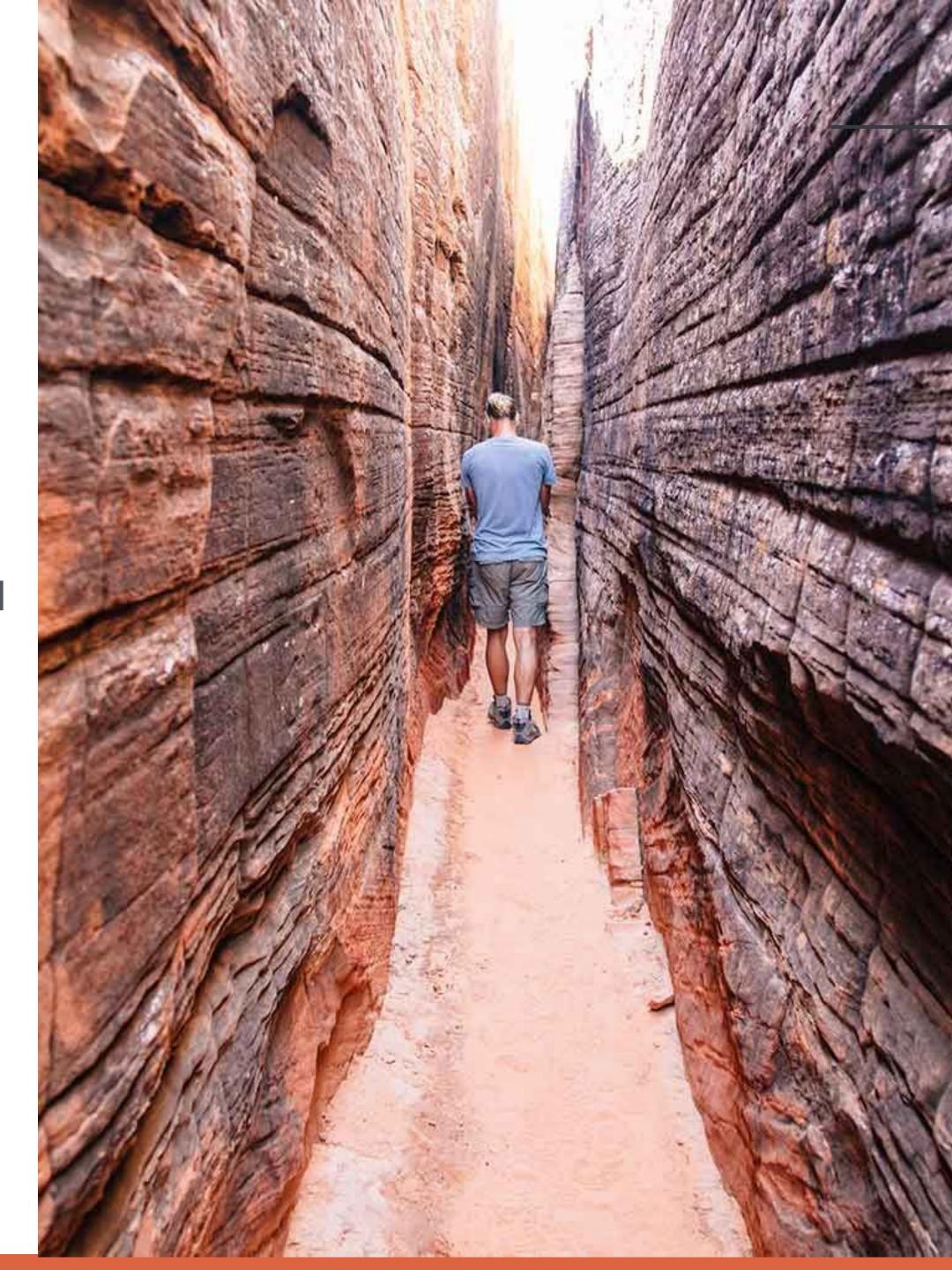
Strategy & development of recreation facilities

- Trails
- Parks
- Outdoor recreation



Business Objectives

- Maximize tourism revenues to create a superior experience for visitors and residents
- Unite tourism related entities and establish a community-led vision
- Responsibly grow the tourism market, while better connecting tourism with economic development
- Clearly communicate how tourism proceeds benefit the community in order to create positive perceptions & partnerships

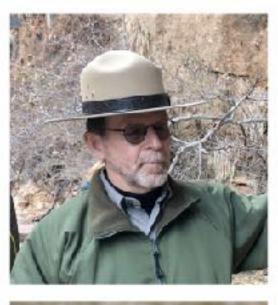




75+) Stakeholder Interviews









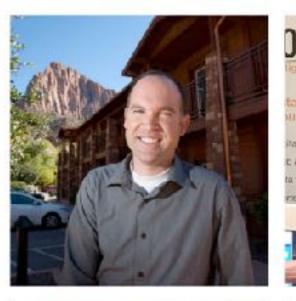












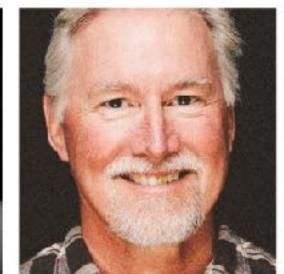












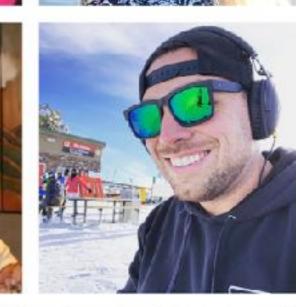


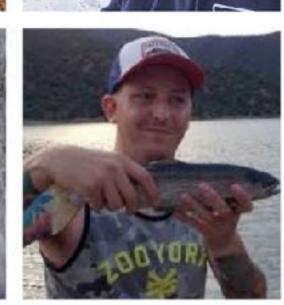




















Brand Study

530 Respondents

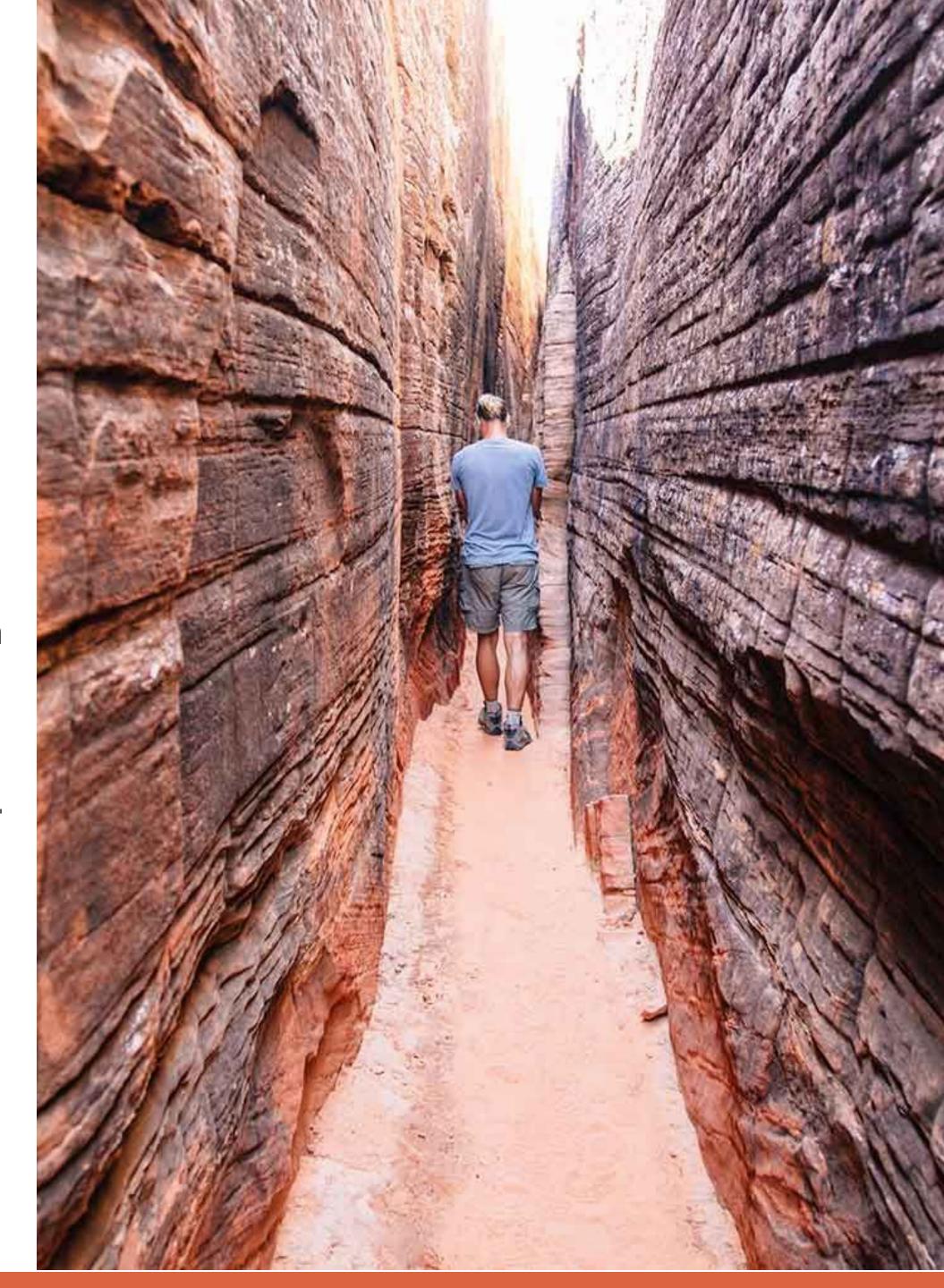
States

Recent
Visitor

Key Takeaways

- We have an identity challenge. Most people outside the area don't connect the area's greatest tourisms assets with the county name. St. George is well known in state, but less recognized further away.
- Zion National Park is the area's most recognizable tourism asset.

 With Zion as the fourth most visited National Park in the country, Washington
 County is home to one of the most memorable tourism names in the world.
- We don't have an overcrowding issue, we have a distribution issue. Despite a robust tourism environment, as a whole, the area is still a hidden gem to our most valuable visitors those who stay longer and spend more.
- Showcase all that Washington County has to offer: We consistently heard from stakeholders the desire to spread visitation beyond ZNP, and for good reason: high volume of diverse, world-class quality activities.



Key Questions

How do you utilize the strength of Zion to spread visitors to other areas?

How do you benefit from the recognition of the Park and not be dependent on it?





GREATER CONVENTION & TOURISM OFFICE

Vision

Inspire Greater. Experience Greater. Live Greater.

Mission

Our mission is to maximize the revenue generated by visitors to create a superior experience for visitors and residents.

Positioning

Greater Zion is one of those rare places that neither words nor pictures can capture. Our communities are filled with individuals who are energized by nature, and inspired by achievement. When people come for the first time they feel something different here. They feel something greater.

The Greater Zion Convention & Tourism Office exists to enhance those feelings and the opportunities they provide.

Maximize tourism revenues to create a superior experience for visitors and residents

Unite Tourism Related Entities

- · Establish a memorable identity with a forward thinking community-led vision
- · Learn of and understand the objectives, pressures, and concerns of communities, land managers and stakeholders

Responsibly Grow the Tourism Market

- Attract the right kind of visitors to the right places at the right time
- · Identify and market to visitors who are seeking rich, memorable experiences
- · Attract those who will stay longer, spend more, and care for the places they visit
- · Create a better connection with tourism and economic development

Distribute Visitation Throughout the County and Throughout the Year

- Establish compelling tourism identities for each region of the county
- · Focus messaging on discovering and experiencing the lesser known attractions and hidden gems in each region
- · Foster user groups who are passionate about the unique activities in each region
- · Pursue events, activities and marketing opportunities that fill non-peak room nights

Inspire Greater Stewardship

- Enhance the compelling feelings visitors experience by investing in, caring for, supporting and celebrating the unique natural and cultural resources of the area
- Communicate the importance of caring for resources
- · Partner with agencies and organizations who promote and fulfill the essential objectives of stewardship

Clearly Communicate Tourism Benefits to the Community

- Be involved in and contribute to positive civic dialogue, philanthropic activity and community service
- · Support infrastructure development that enhances tourism experiences, opportunities and the quality of life for locals
- Develop local campaigns to generate pride, support and positive sentiment among residents
- · Initiate training programs to assist stakeholders in developing effective marketing, PR, and hospitality strategies

Marketing Objective

Bring the right kind of visitors here at the right time to the right places

Attract a Better Traveler

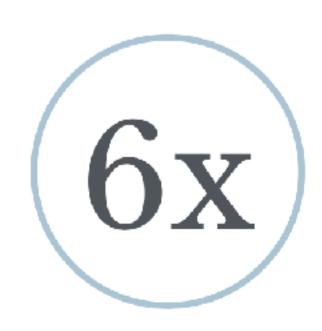
We don't need more travelers - we need better travelers.

Our focus is to attract visitors who are seeking the rich, memorable experiences that this area can provide.

- Visitors who genuinely care about the places they visit
- · Visitors who will do their part to preserve the natural and cultural resources
- Visitors who connect with the landscape in a way that will lead to lifelong stewardship

Our message should resonate with visitors who will immerse themselves fully in the environment and as a result become emotionally attached to the area. This type of visitor will stay longer, spend more money and come back again.

Utah Travelers



Out-of-State visitors stay longer & spend 6 times that of resident travelers

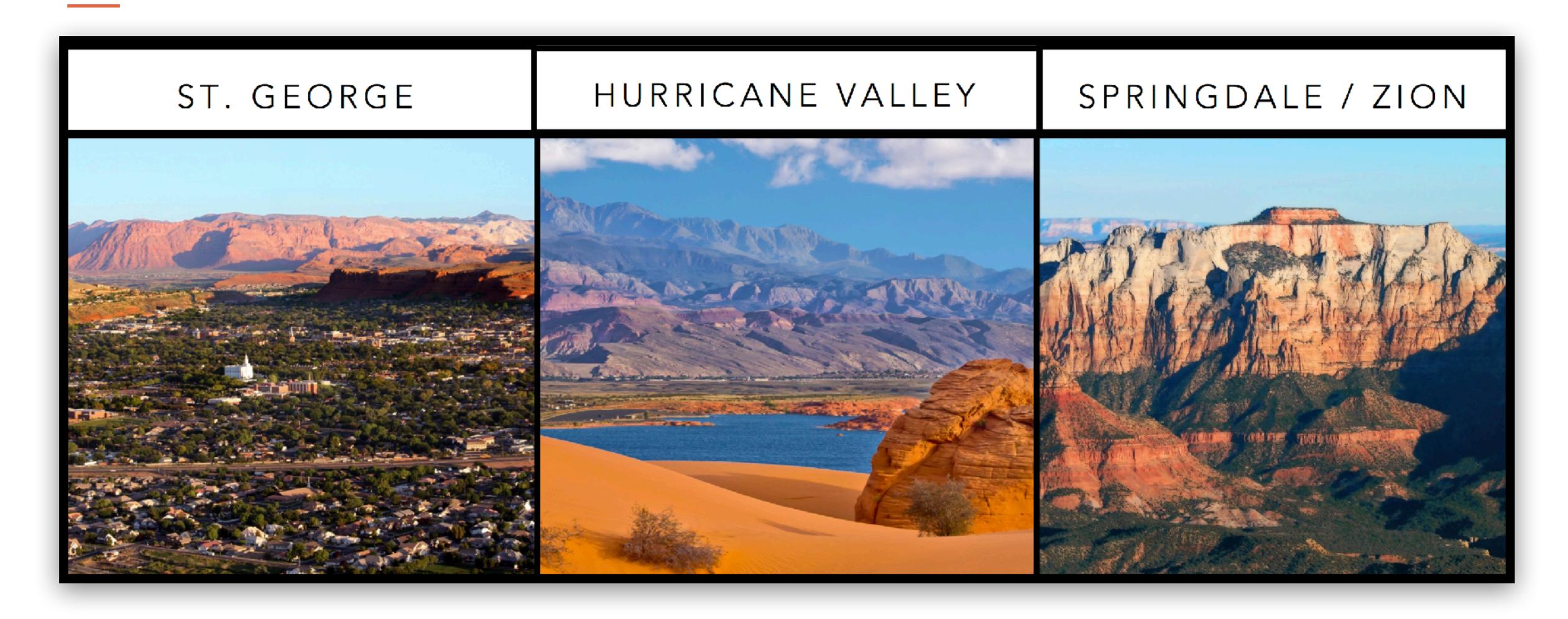
(4.1 vs. 2.7 nights for in-staters)

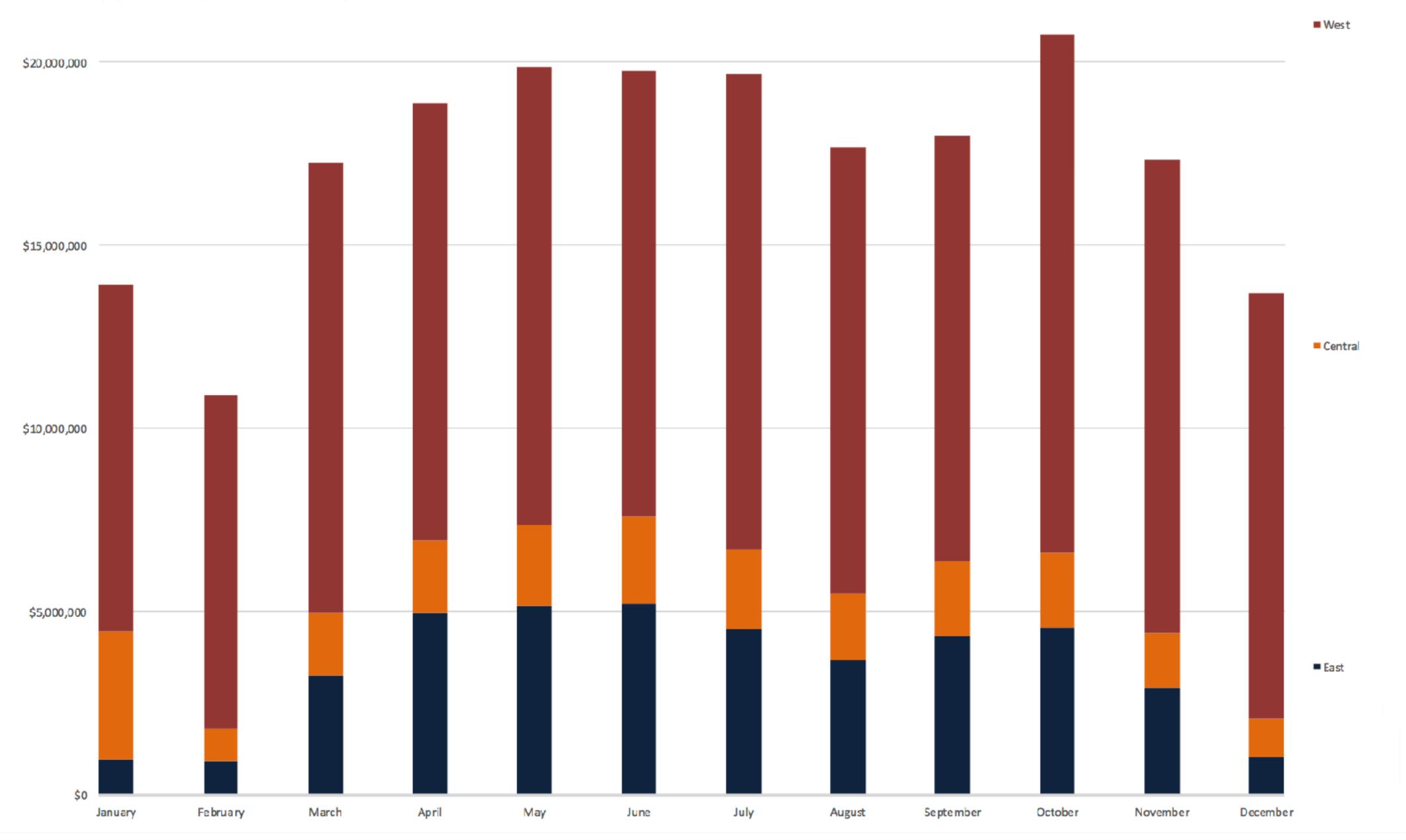


Revenue per activity statistics indicate that Entertainment, Adventure Sports, and Sports & Recreation are key opportunities vs. Family activities

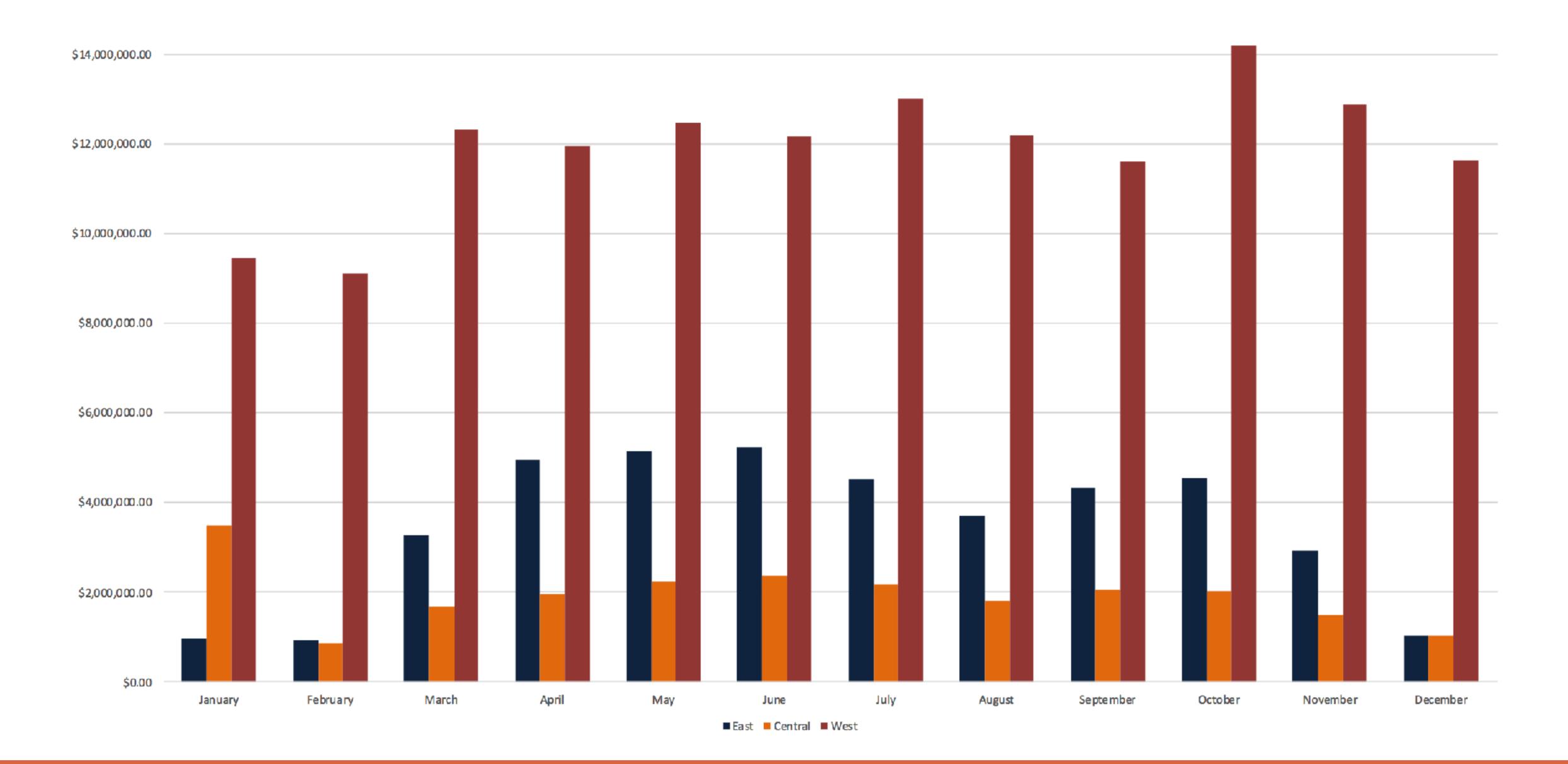
Entertainment: 1st in Spending | Adventure Sports: \$1,334 | Sports & Rec: \$1,106 | Families: \$402

Three Regions





\$16,000,000.00



Top Spending States

Eastern County

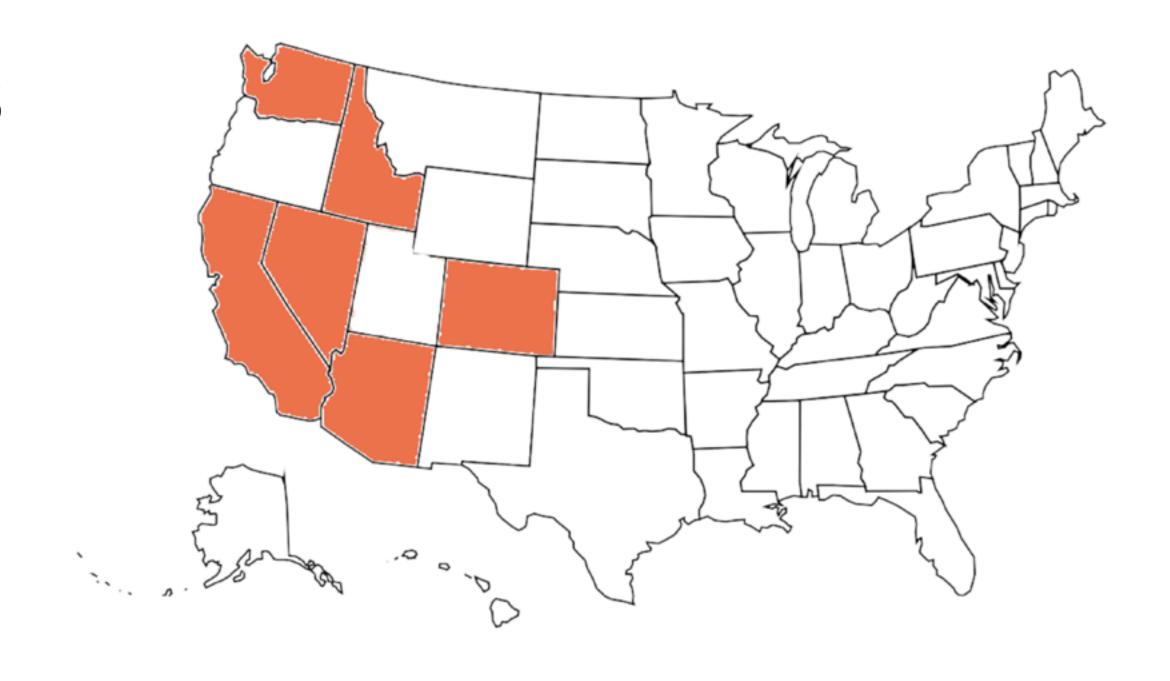
California, Nevada, Washington, Texas

Central County

California, Arizona, Nevada, Colorado

Western County

Nevada, California, Arizona, Idaho



% of Total Spending from Rocky Mtn States

Eastern County

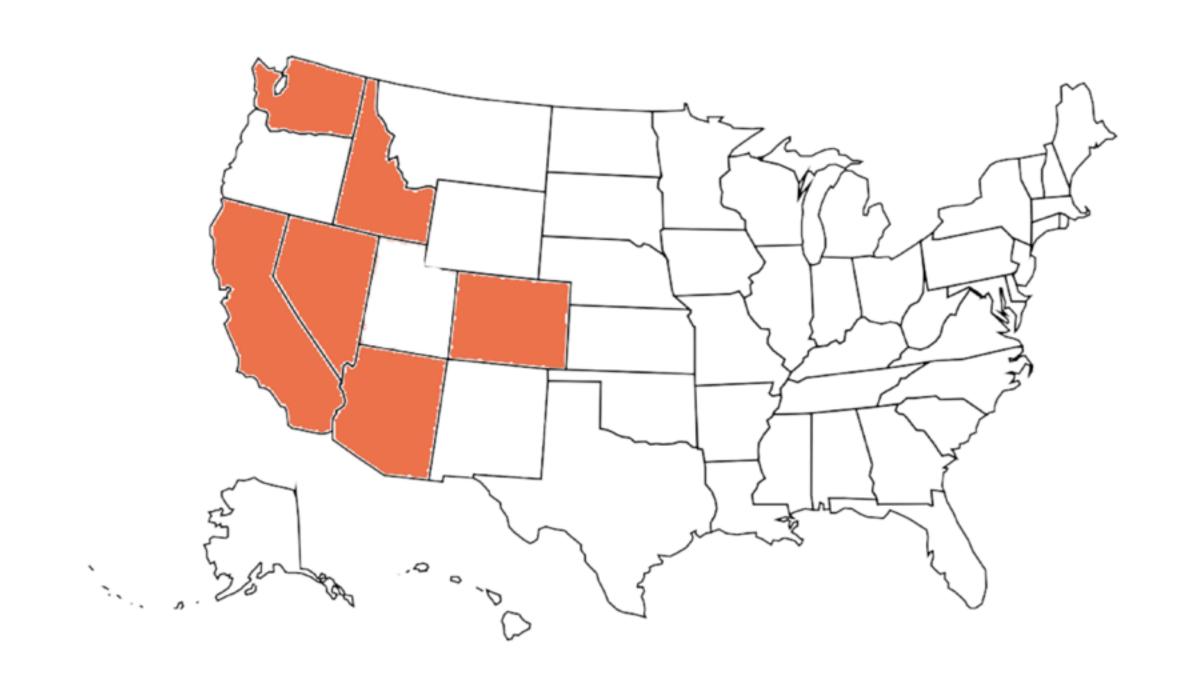
46%

Central County

63%

Western County

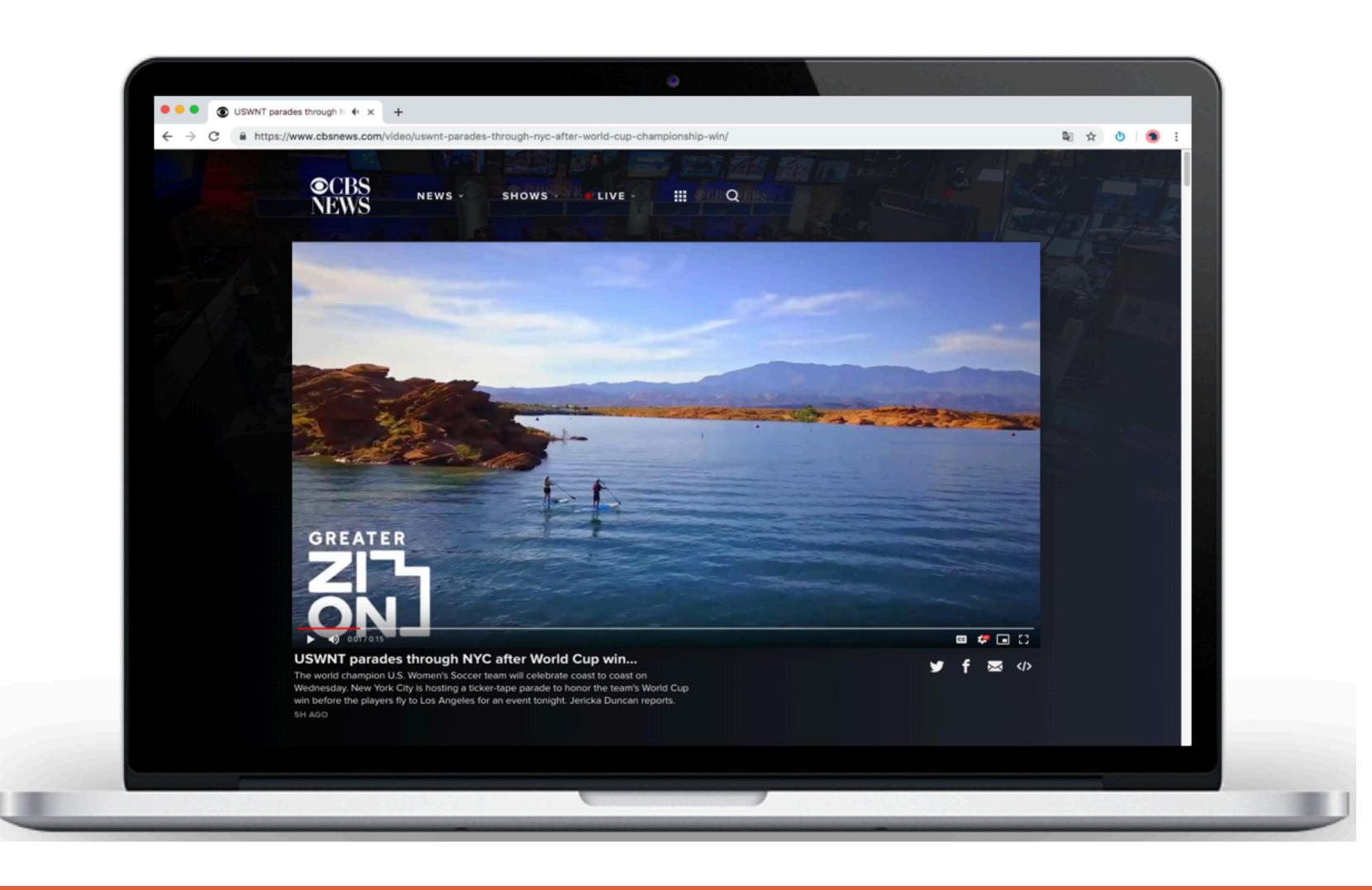
71%



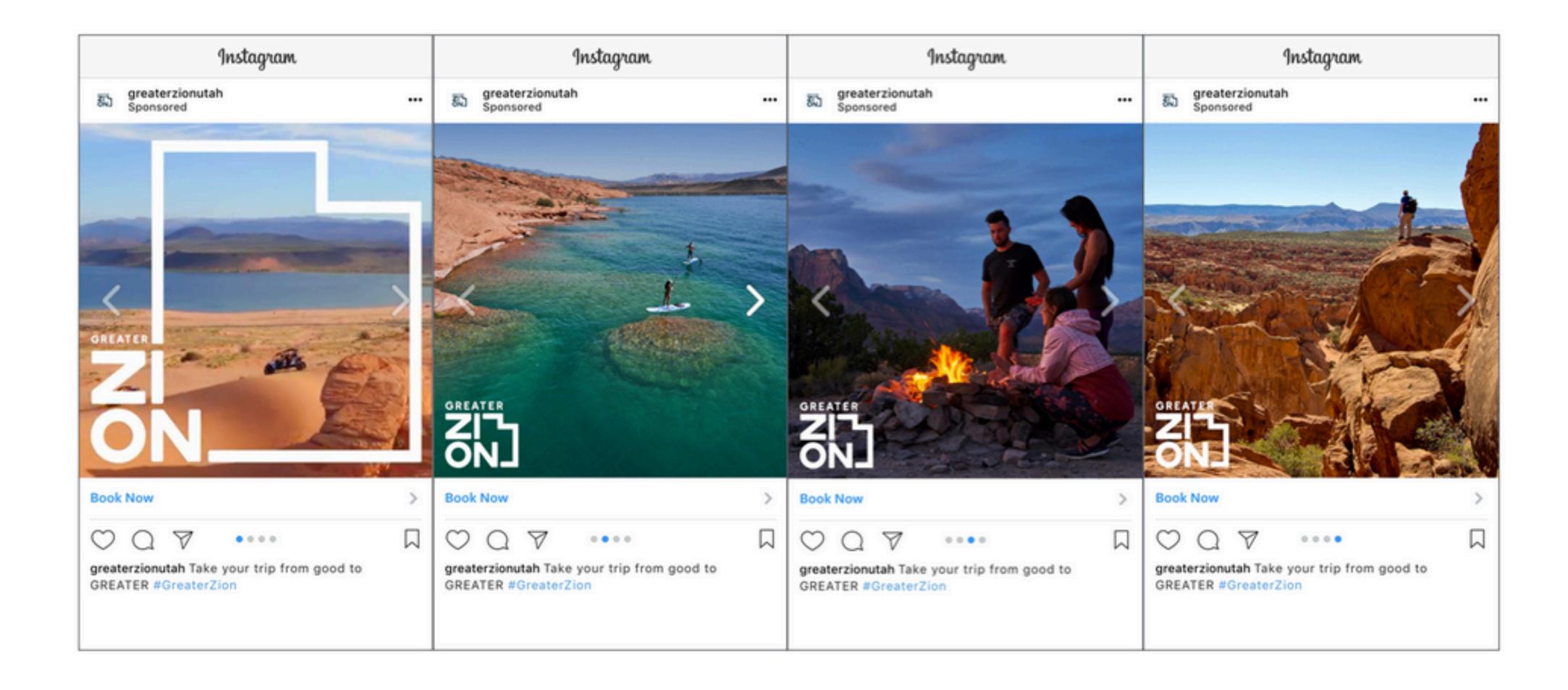
Beyond the Park



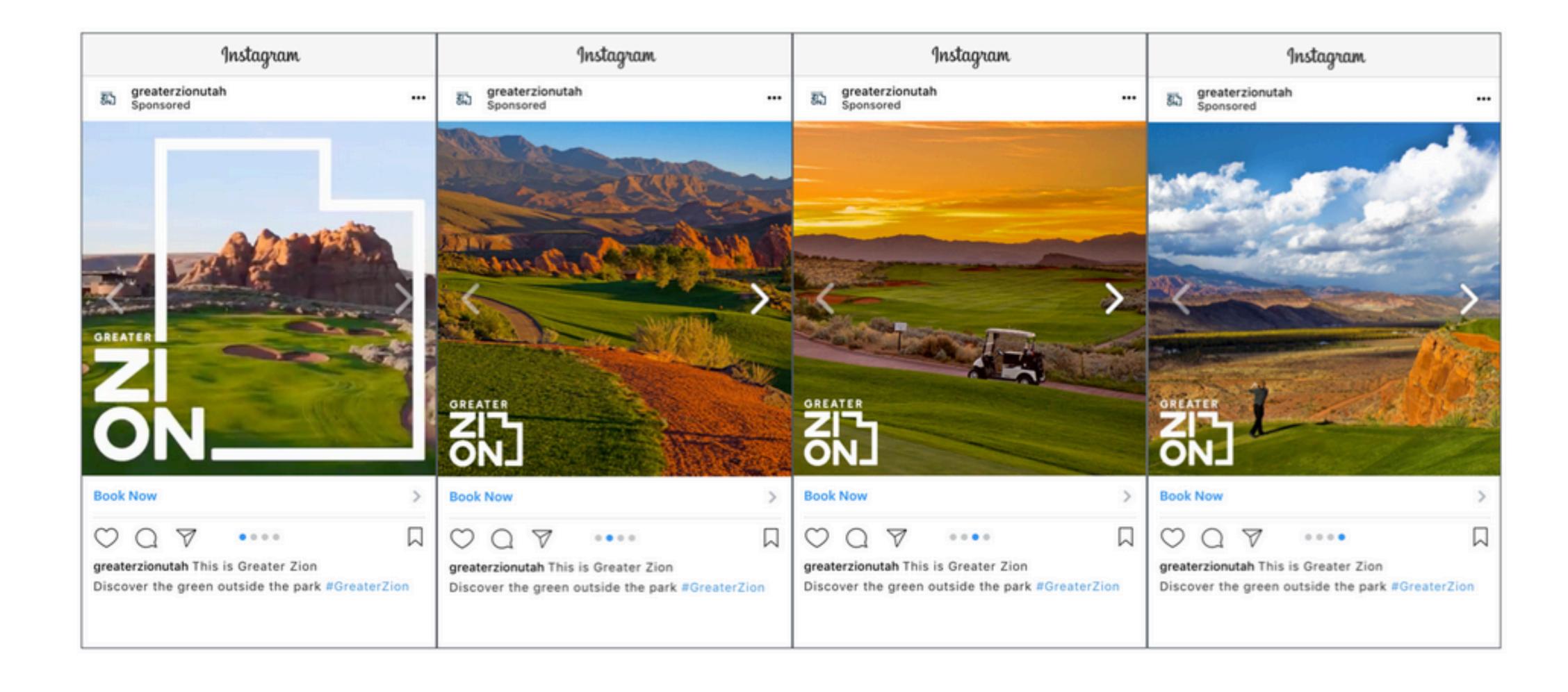
Creative Snapshots: Q2 Digital Video



Creative Snapshots: Q2 Social



Creative Snapshots: Q2 Social



Creative Snapshots: Q2 Digital



Audiences

While there are a number of traveler types that visit Greater Zion annually, based on our strategic priorities and recommended approach - we focus on one primary audience: Adventure & Sports Travelers, as well as three high-quality sub-audiences: Mountain Bikers, OHVers and Golfers.

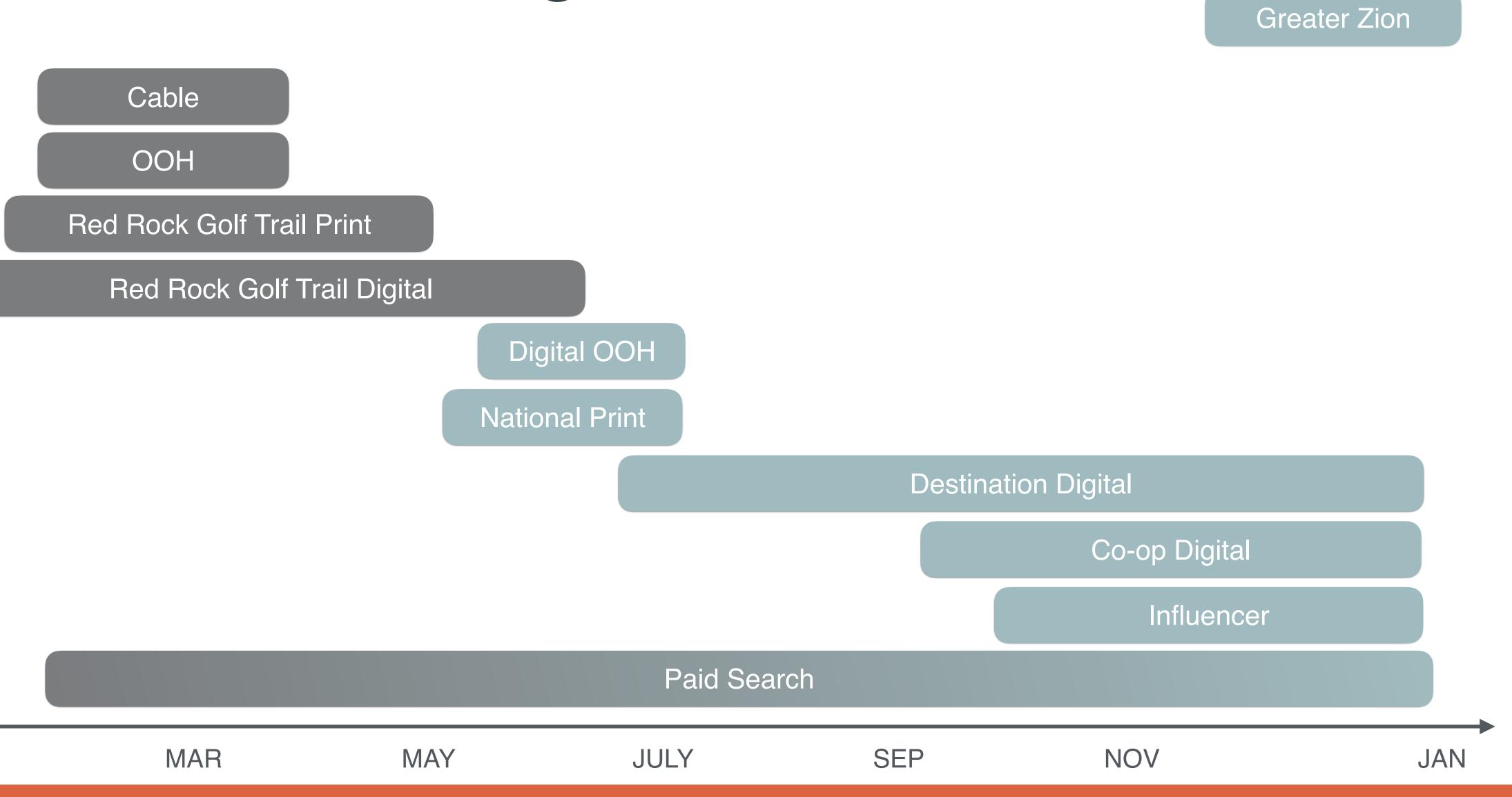






JAN

Paid Media Timing



Key:

Visit St. George

Average Length of Stay



Avg. length of stay has increased 13% since launch of Greater Zion

1.77 Days

2.00 Days BEFORE GZ
Jan-Jun
(6 months)

AFTER GZ
Jul-Aug
(2 months)

Average Party Size



Avg. party size has increased 24% since launch of Greater Zion

1.65 Travelers

2.05 Travelers BEFORE GZ
Jan-Jun
(6 months)

AFTER GZ
Jul-Aug
(2 months)

Average Number of Visitors per Month



Total avg. travelers has increased 27% since launch of Greater Zion

187.7 Travelers

238.5 Travelers BEFORE GZ
Jan-Jun
(6 months)

AFTER GZ
Jul-Aug
(2 months)

CULTIVATION

2020 Audiences

For 2020, we want to build on the monentum from 2019 among **OHV**, **MTB**. We will further refine the **Golf** audience, moving away from a value based message to better identify the right golfers for Greater Zion.

We also plan to add **competitive sports** as a 4th audience, building to the IRONMAN 70.3 World Championship in 2021.



Stewardship Initiatives







Common Mission

National Park Service

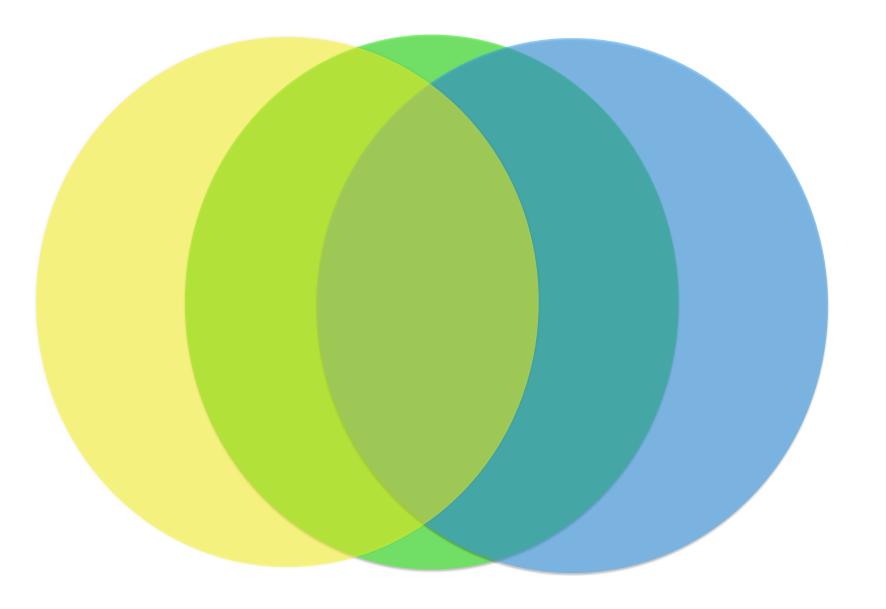
Preserve unimpaired the natural and cultural resources and values of the National Park System for the enjoyment, education, and inspiration of this and future generations. The Park Service cooperates with partners to extend the benefits of natural and cultural resource conservation and outdoor recreation throughout this country and the world.

Zion Forever Project

Engage in collaborative efforts with federal agencies, gateway communities, and guests to create connections to the Greater Zion Landscape that will lead to lifelong stewardship.

Greater Zion Convention & Tourism

Maximize the revenue generated by visitors to create a superior experience for visitors and residents. In everything we do, we seek to Inspire Greater, Experience Greater, and Live Greater.



GREATER ZION STRATEGY

Messaging

Stewardship for the next 100 years

Relationship of the Park to the Greater Zion Landscape

Why is it so popular?

How do we maintain that?

Local Messaging

How do we support the park? How do we be part of it?



Zion Pledge

To be a good steward and help protect myself and Zion National Park, I pledge to:

- Plan ahead and prepare by reading and following the information in the park newspaper.
- Keep personal food away from all wildlife, and never approach or touch a wild animal.
- Protect the canyon walls, rocks, and trees from graffiti and vandalism.
- Preserve the park scenery by not collecting wildflowers, rocks, or plants.
- Never enter a narrow canyon when there is a potential for flash flooding.
- Be ready to pack out my human waste, toilet paper, and diapers from trails and river corridors.

- Stay on established trails to protect vegetation and fragile cryptobiotic soils.
- Leave rocks as I find them and not stack rock cairns or build river dams.
- Protect the natural sounds of the canyon by talking softly and using headphones for music.
- Recycle what I can and dispose of my trash and food appropriately.
- Park in designated areas and avoid blocking traffic.

Pledge courtesy of National Park Service



Co-Op Funding

Advertising

Event Marketing

Sponsorships

Capital Projects

Utah Office of Outdoor Recreation Grants (Nov. 8)

UOR Grants



- Utah Outdoor Recreation Grant (UORG) provides matching grant funding to build new outdoor recreation infrastructure.
- Recreation Restoration Infrastructure (RRI) grant helps fund restoration and rehabilitation of existing infrastructure.
- The Utah Children's Outdoor Recreation and Education (UCORE) grant program helps fund programs that provide high-quality, outdoor-focused learning experiences to youth ages 6-18, and teaches children the physical skills that can make outdoor recreation part of a healthy and active lifestyle.

UOR Grants

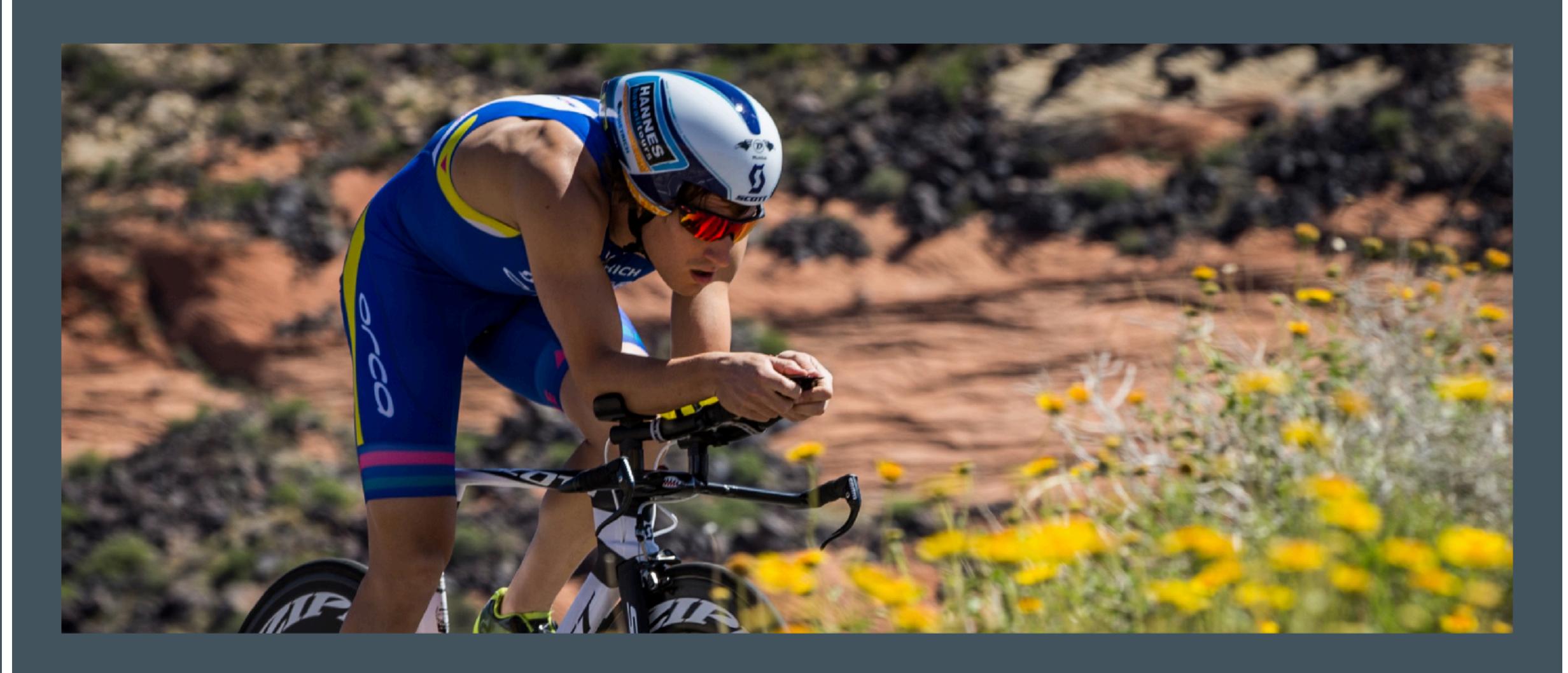
RECREATION GRANT

Workshop: Feb 8 in St. George

Tara McKee (tmckee@utah.gov)

India Nielsen (indianielsen@utah.gov)

IRONMAN





IRONMAN 70.3 World Championship

SEPTEMBER 13-20, 2021



IRONMAN 70.3 World Championship

SEPTEMBER 13-20, 2021



- 5700 athletes in France
- Projecting 7,000 in St. George
- 2,800 from outside of the U.S.
- 17,000 family & friends

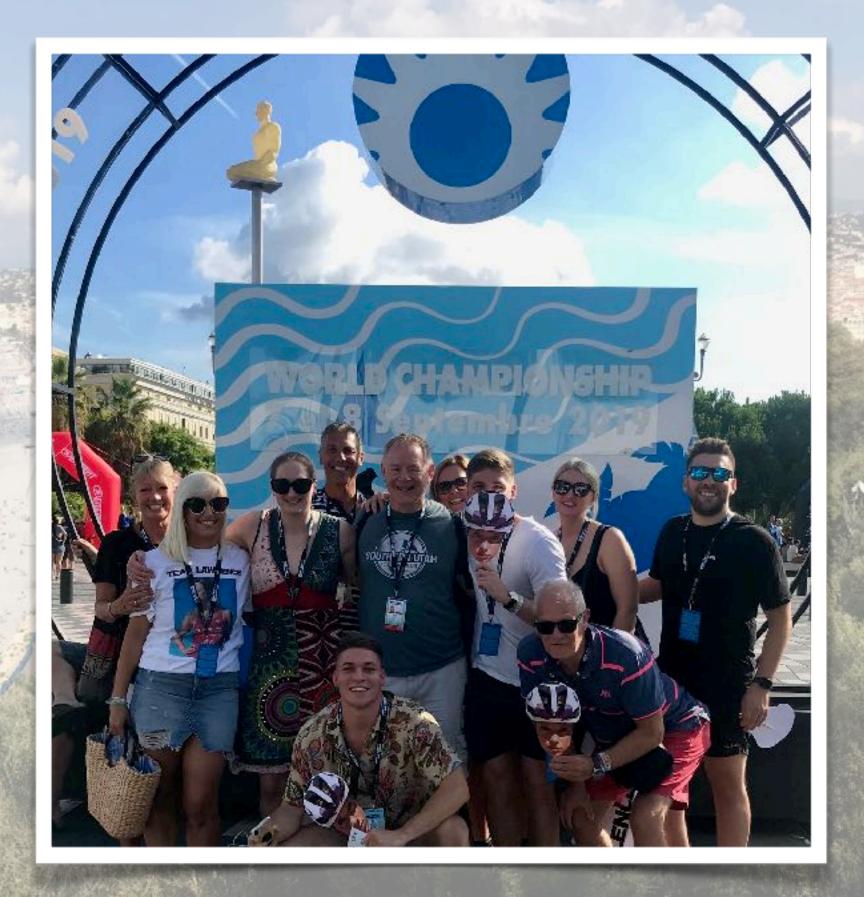
\$25 million in direct economic impact

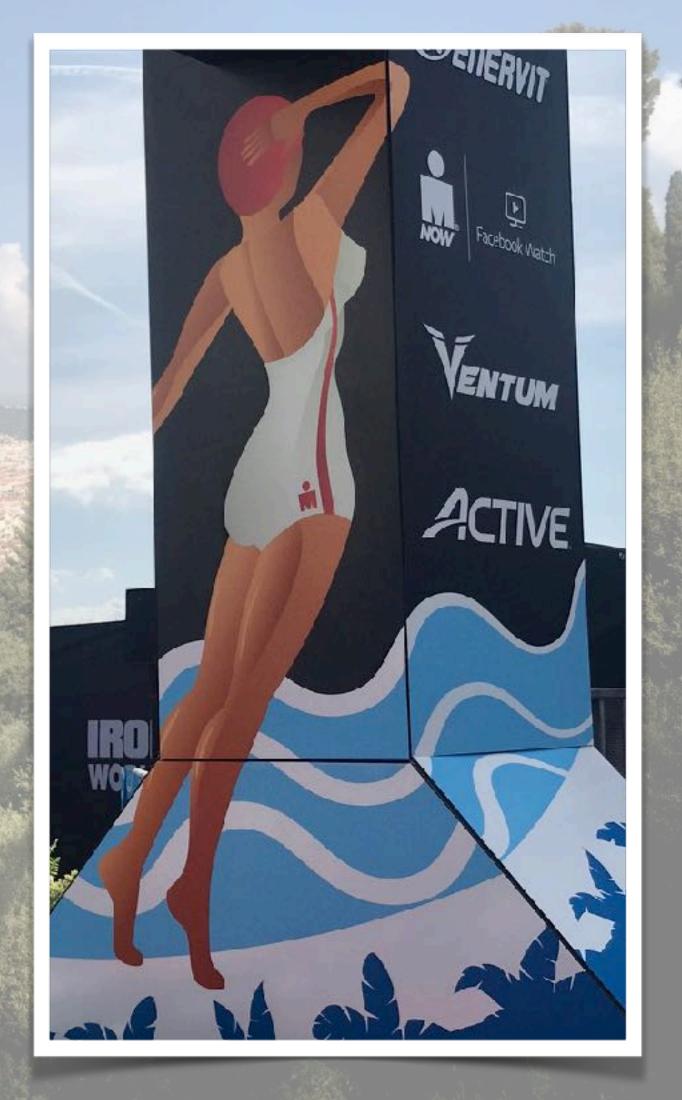
IRONMAN 70.3 World Championship

SEPTEMBER 13-20, 2021

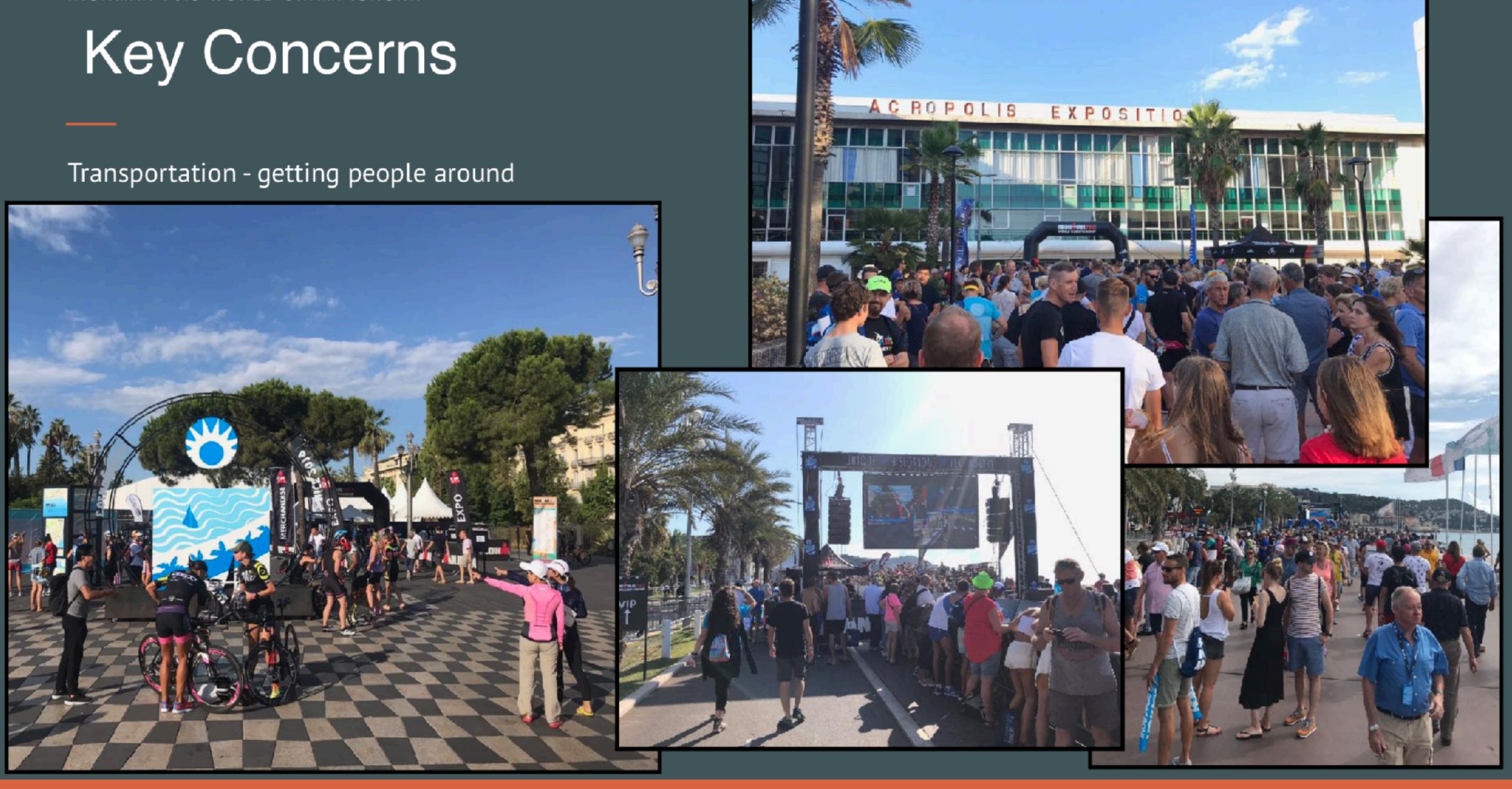
It's as much about the place as it is about the race.





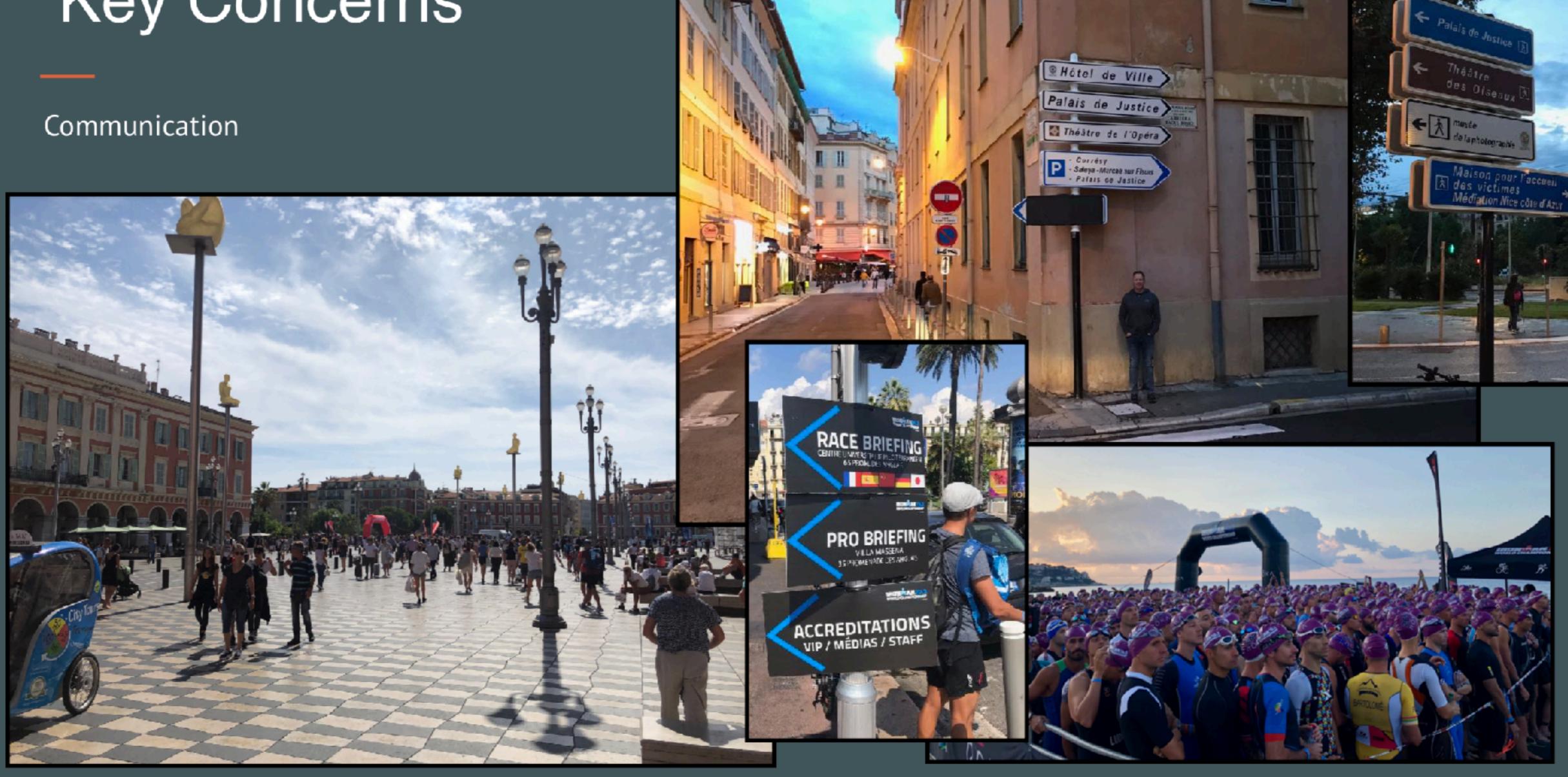






IRONMAN 70.3 WORLD CHAMPIONSHIP

Key Concerns





Lodging Report

Temporary Population

Kem Gardner Report

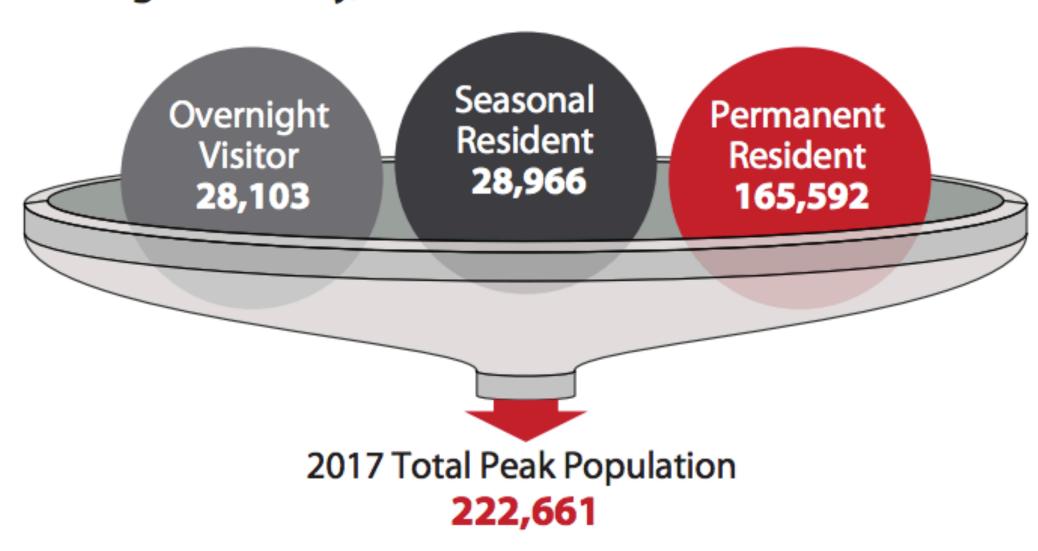
https://gardner.utah.edu/wp-content/uploads/WashCounty2017PopEst-Report.pdf

Temporary Resident Population by Type, Washington County, 2017

Temporary Resident Population Type	Average Peak Population
Total Seasonal Residents	28,966
Total Overnight Visitors	28,103
Hotel/Motel/Hostel	14,621
Private Home (Friends/Family)	8,200
Campground/RV Site	4,200
Youth Residential Programs	878
Bed and Breakfast	204
Total Temporary Resident Population	57,069

Sources: Utah Population Committee; Kem C. Gardner Policy Institute analysis of STR, Inc., OmniTrak Group, Inc., AirDNA, National Park Service, Utah State Park, Bureau of Land Management, Pine Valley Ranger District, Dixie National Forest, Utah Department of Human Services, and general Washington County hotel, B&B, resort, and campground data, Washington County Assessor data and Census Bureau data.

Total Peak Population Estimates by Resident Type, Washington County, 2017



Sources: Utah Population Committee; Kem C. Gardner Policy Institute analysis of STR, Inc., OmniTrak Group, Inc., AirDNA, National Park Service, Utah State Park, Bureau of Land Management, Pine Valley Ranger District, Dixie National Forest, Utah Department of Human Services, and general Washington County hotel, B&B, resort, and campground data, Washington County Assessor data, and Census Bureau data.

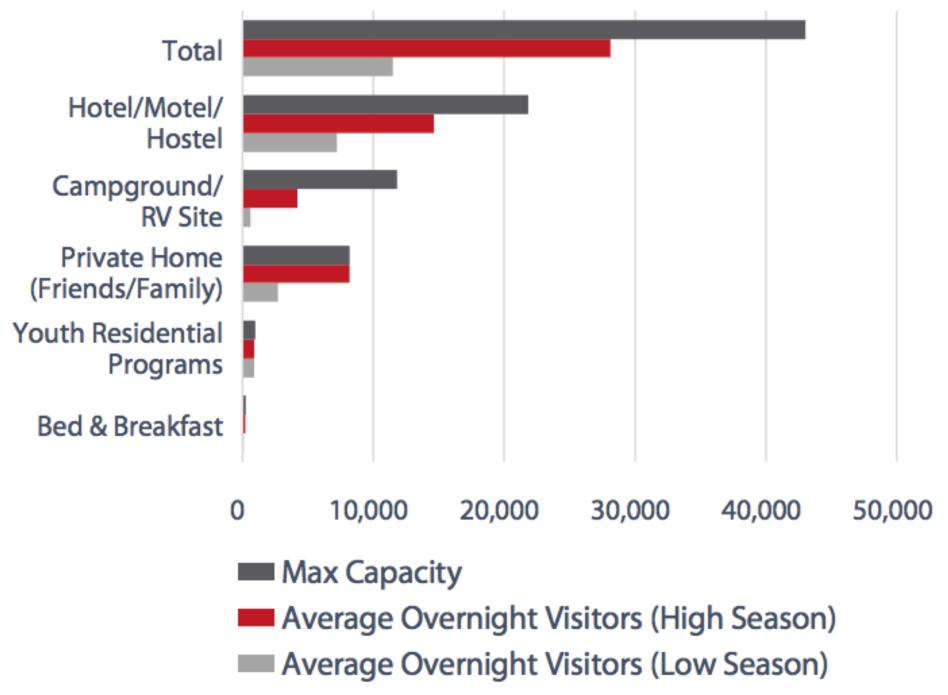
Temporary Population

Table 1: Overnight Visitor Estimates, Washington County, 2017

Accommodation Type	Average Overnight Visitors (Low Season)	Average Overnight Visitors (High Season)	Max Capacity
Total	11,498	28,103	43,045
Hotel/Motel/Hostel	7,215	14,621	21,828
Private Home (Friends/ Family)	2,700	8,200	8,200*
Campground/RV Site	600	4,200	11,800
Youth Residential Programs	878	878	975
Bed and Breakfast	105	204	242

^{*}Max Capacity is unknown for visitors staying with friends and families
Sources: Kem C. Gardner Policy Institute analysis of STR, Inc., OmniTrak Group, Inc.,
AirDNA, National Park Service, Utah State Park, Bureau of Land Management, Pine Valley
Ranger District, Dixie National Forest, Utah Department of Human Services, and general
Washington County hotel, B&B, resort, and campground data

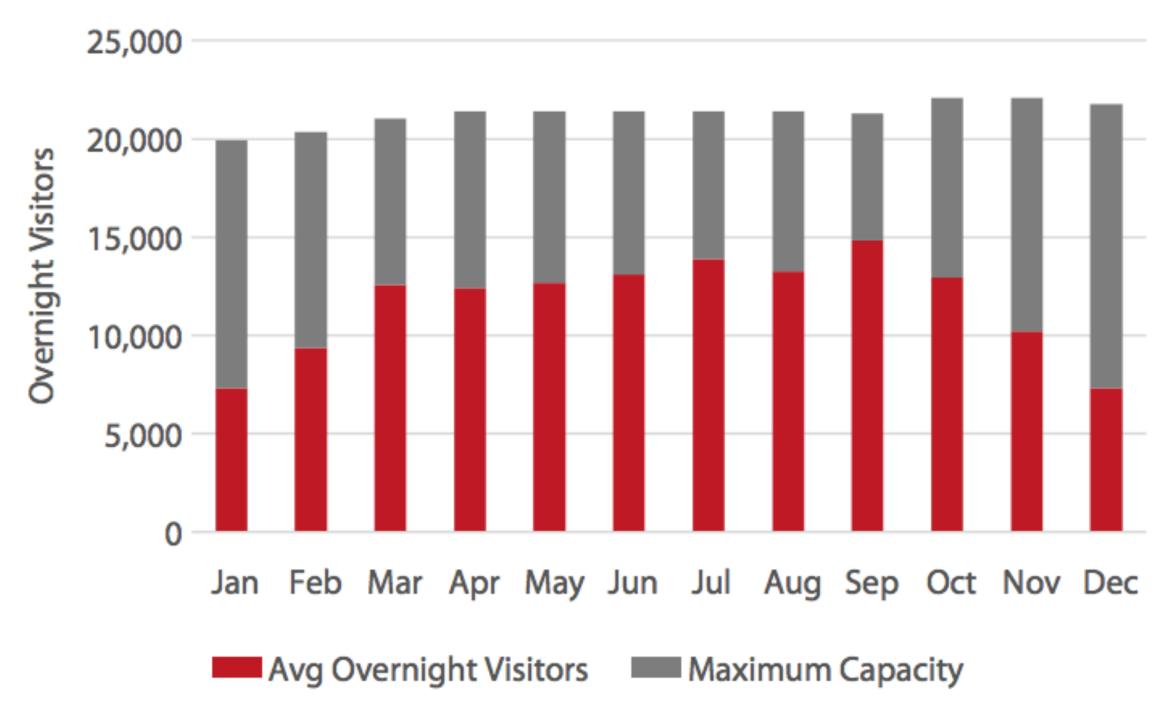
Figure 3: Overnight Visitor Estimates, Washington County, 2017



^{*}Max Capacity is unknown for visitors staying with friends and families
Sources: Kem C. Gardner Policy Institute analysis of STR, Inc., OmniTrak Group, Inc.,
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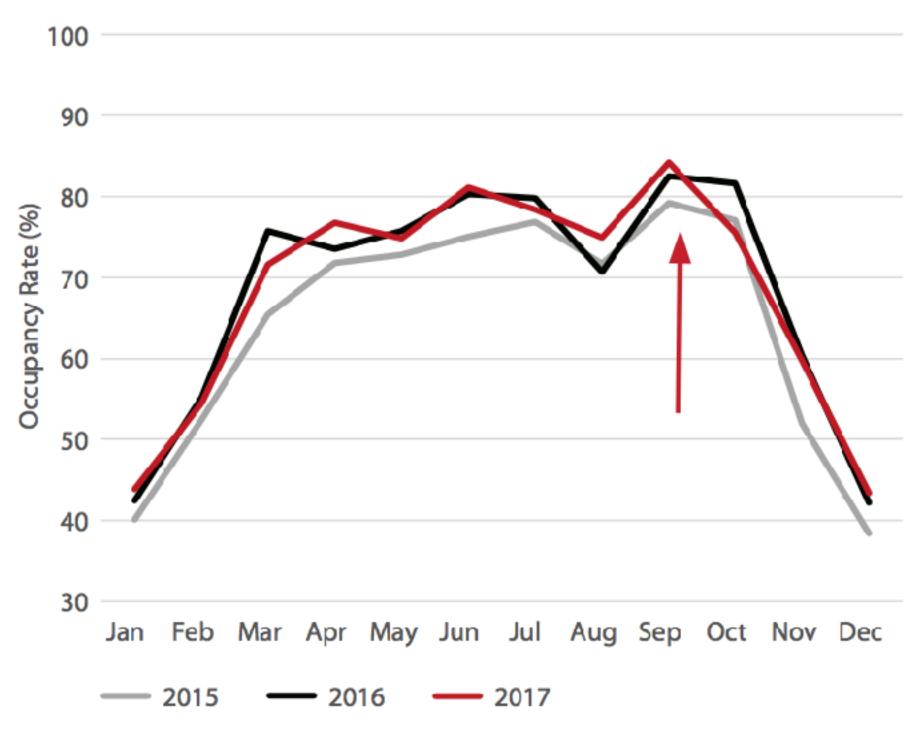
Occupancy

Figure 4: Monthly Peak Occupancy and Maximum Capacity, Hotels/Motels/Bed and Breakfast, Washington County, 2017



Sources: Kem C. Gardner Policy Institute analysis of OmniTrak Group, Inc., and STR, Inc.

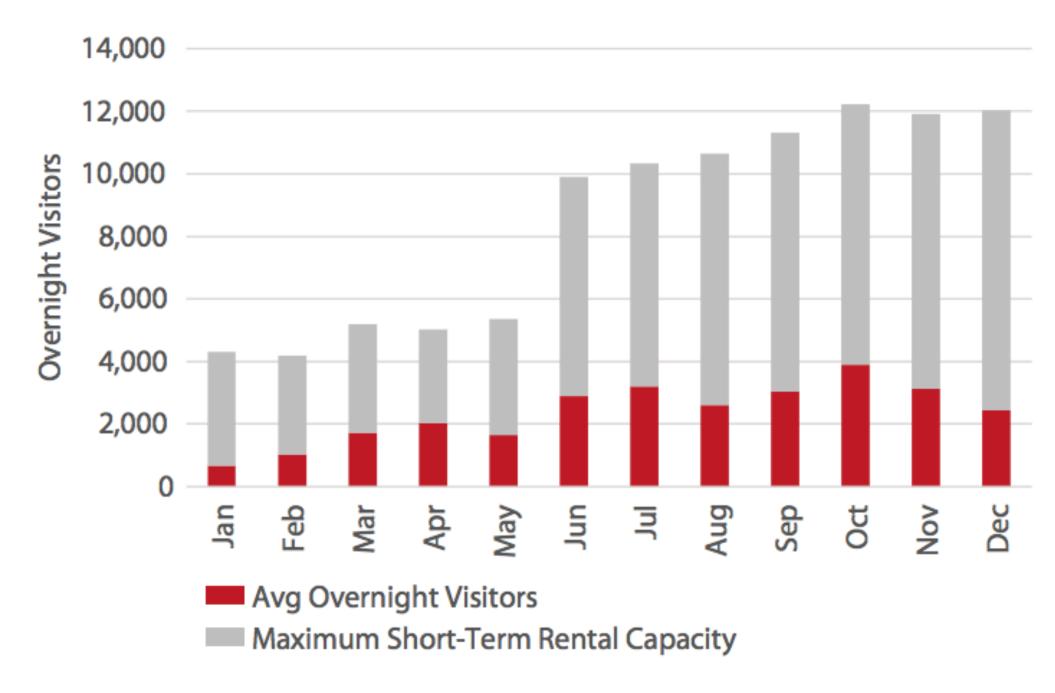
Figure 9: Hotel Occupancy Rates by Month, Washington County, 2015-2017



Source: STR, Inc. Republication or other pre-use of this data without the express written permission of STR is strictly prohibited

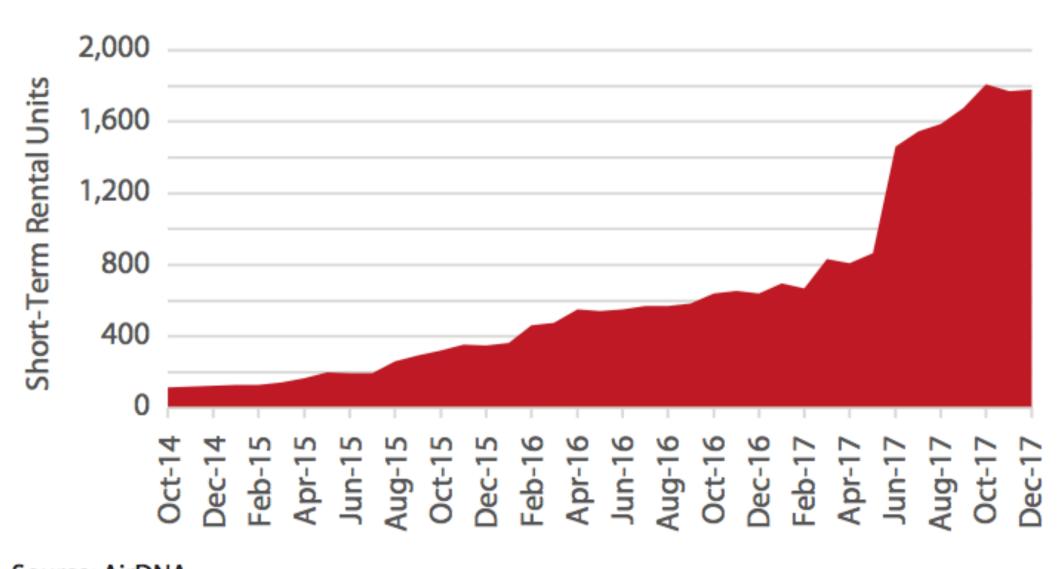
Short Term Rentals

Figure 7: Overnight Short Term Rental Guests vs. Maximum Short Term Rental Capacity, Washington County, 2017



Source: Kem C. Gardner Policy Institute analysis of AirDNA data

Figure 6: Short Term Rental Listing Data, 2014-2017 Washington County



Source: AirDNA

Short Term Rentals

In 2017 there were over 1800 short term rental listings in Washington County

The number of short term rental listings increased by over 1000 in one year

Number of short term rental visitors: 1000 - 4000 per month

Capacity of short term rental visitors: 4,000 to 12,000 per month (25% - 33% occupancy)

July 2019 Data

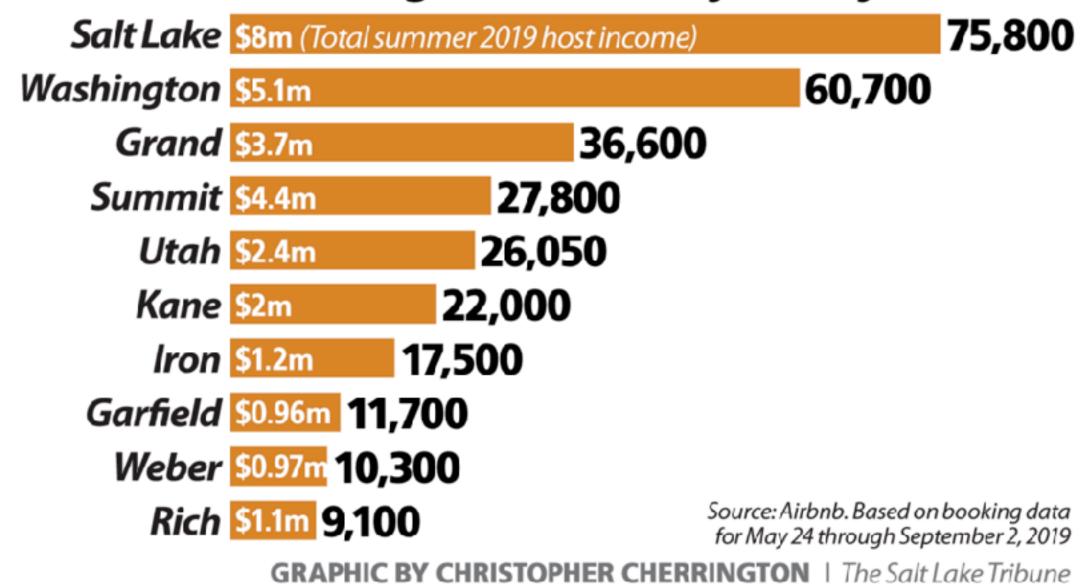
- Total Listings: 2574 (St. George 782, Hurricane Valley 462, Washington 440)
- Average Occupancy Rate: 54%
- 50% of listings are available full time

Short Term Rentals

Airbnb sees a record summer in Utah

Utahns who hosted Airbnb guests at their properties earned an estimated \$37.3 million over the summer, in what the company said was a new record for guest arrivals through its service nationwide.

Total 2019 summer guest arrivals by county



(Christopher Cherrington I The Salt Lake Tribune)

Hotels

In 2016 there were 5051 hotel rooms in Washington County

There are currently 6165 rooms in Washington County

From 2017 - 2019 the number of rooms will have increased by over 1700

500 of the new rooms are in Hurricane Valley

(NAI Excel)

STR Report

	OCC	ADR	RevPAR
8/1/18	66.70	110.46	74.58
8/1/19	62.78	105.1	66.68

Wingate by Wyndham 780 W STATE ST, HURRICANE	100	2017
LaQuinta 101 E 500 N, LA VERKIN	93	2017
Hyatt Place 1819 S 120 E, ST. GEORGE	120	2017
Comfort Inn & Suites 175 N 1000 E, ST. GEORGE	91	2017
SpringHill Suites by Marriott 1141 CANYON SPRINGS DR, SPRINGDALE	114	2017
Best Western Plus 668 ZION PARK BLVD, SPRINGDALE	69	2017
Driftwood Expansion 1515 ZION PARK BLVD, SPRINGDALE	30	2017
Bumbleberry Inn Expansion 97 BUMBLEERRY INN, SPRINGDALE	24	2017
Staybridge Suites 1301 SUNLAND DRIVE, ST. GEORGE	121	2018
Hampton Inn & Suites by Hilton 1250 W SUN RIVER PKWY, ST. GEORGE	1 15	2018
Tru by Hilton 1251 SOUTH SUNLAND DRIVE, ST. GEORGE	105	2018
Clarion Inn and Suites 2260 W STATE STREET, HURRICANE	91	2018
My Place Hotel 1644 S 270 E, ST. GEORGE	67	2018
Cable Mountain Lodge Expansion 147 ZION PARK BLVD, SPRINGDALE	26	2018
Fairfield by Marriott ONE CAMINO DEL RIO, VIRGIN	194	2019
Comfort Inn & Suites 45 N 2600 W, HURRICANE	82	2019
My Place 1167 W 80 S, HURRICANE	46	2019
Zion Canyon Lodge 990 ZION PARK BLVD, SPRINGDALE	36	2019
Springhill Suites BUENA VISTA & GREEN SPRINGS, ST. GEORGE	111	UC
Advenire at City View 50 W ST GEORGE BLVD, ST. GEORGE	60	UC
The Dwellings 480 S STATE STREET, HURRICANE	16	UC

Greater Zion TRT

2018 TRT revenue was up 9.5% over 2017

2019 TRT year-to-date collections are up 1% over 2018

- \$4,483,563 through June 1, 2019
- \$4,388,221 through June 1,2018

Thank You

