The background of the entire page is a textured, cracked earth pattern. The top portion is a dark brown color, while the rest of the page is a deep teal or blue color. The cracks in the earth are irregular and run in various directions, creating a complex, organic pattern.

Sheridan

—WYOMING—

2018 COUNTY-WIDE 4% LODGING TAX INFORMATION PACKET



EXECUTIVE SUMMARY:

1. The Sheridan Travel & Tourism Board of Commissioners recently voted unanimously in favor of implementing a 4% County-Wide Lodging Tax across Sheridan County.
2. The City of Sheridan, and the Towns of Dayton, Rancheater and Clearmont have supported this initiative, and the Sheridan County Commissioners have voted in favor of allowing citizens of Sheridan County to vote on the County-Wide Lodging Tax in the November 2018 General Election.
3. Local Lodging Tax funds are used to market, promote and advertise Sheridan and its attractions and events to potential visitors from domestic and international markets.
4. **LOCALS DO NOT PAY THE LODGING TAX.** The Lodging Tax is paid only by visitors staying overnight in hotels, motels, RV parks, campgrounds, guest ranches and B&Bs. The Lodging Tax has always been and will remain a tax that locals do not pay.
5. Tourism is the second-largest industry in Wyoming and is critical to the diversification of the State's economy. Travel & Tourism spending in Sheridan County is worth more than \$100 million per year.
6. County-Wide Lodging Tax revenue spending would be governed by a Joint Powers Board, with representation from each of Sheridan County's municipalities. The Joint Powers Board details contained in this document are based on a standard State of Wyoming template.
7. The Lodging-Tax vote does not jeopardize other initiatives like the 1-Cent Optional Sales Tax vote. Historically, both initiatives receive overwhelmingly positive community support. The City-Wide Lodging Tax passed with nearly 76% of the vote in the 2016 General Election.
8. Only four counties in Wyoming do not have a County-Wide Lodging Tax. Park, Campbell, Teton, Natrona and other major tourism destinations across Wyoming have implemented County-Wide Lodging Tax.
9. County-Wide Lodging Tax collections would begin July 1, 2019.



THIS IS SHERIDAN COUNTY, WYOMING.

The world comes out west expecting to see cowboys driving horses through the streets of downtown; pronghorn butting heads on windswept bluffs; clouds encircling the towering granite pinnacles of the Bighorn Mountains; and endless expanses of wild, open country. These are some of the fibers that have been stitched together over time to create the patchwork quilt of Sheridan's identity, each part and parcel to the Wyoming experience. But what you may not have been expecting when you came way out West was a thriving, historic downtown district, with western allure, hospitality and good graces to spare; a vibrant art scene; bombastic craft culture; postcard-perfect small towns; a robust festival and events calendar; and living history from one corner of the County to the next.

At first blush, picturesque Sheridan County is all archetypal mountain verve and Wyoming vigor, but there's an artistic dynamism and cultural allure here that belies its cow town reputation. Sheridan's ranching roots run centuries deep, but so too does its polo legacy. The flagship Sheridan WYO Rodeo draws nearly 30,000 visitors to town every July, while the WYO Theater, Brinton Museum and the Whitney Center for the Arts have become artistic touchstones with significant regional cache. National attractions abound – the Historic Sheridan Inn is a siren song to the legend and lore of the Wild West; the ancient Medicine Wheel, at an altitude of 9,462-feet, lords over the mountains with a mystical presence that defies explanation; and Indian battle sites like Fort Phil Kearny, the Fetterman Fight, and the Wagon Box Fight, all located along the Bozeman Trail, offer endless educational and historical attractions.

There's an undercurrent of the carefree in Sheridan County, and the legendary hospitality of its proud residents is worn like a badge of honor. Blessed by mountain topography and evenly spaced between Yellowstone National Park and Mount Rushmore and Badlands National Park, there's a sense about town that Sheridan is poised to be the Next Big Thing, though those in the know understand that it always has been. It has been the greatest honor of my career to work to further develop Sheridan's travel and tourism industry, and I know that together we can foster significant economic development that benefits each and every citizen in Sheridan County.

SHAWN PARKER, EXECUTIVE DIRECTOR
SHERIDAN TRAVEL & TOURISM
SHAWN@SHERIDANWYOMING.ORG
SHERIDANWYOMING.ORG
307-673-7120





CITY-WIDE LODGING TAX

Sheridan Travel & Tourism is funded by the 4% Lodging Tax collected by City of Sheridan hotels, motels, B&Bs, cottages, and RV parks. The Lodging Tax was initially approved by voters in 1992 and has been approved every four years since. Sheridan Travel & Tourism efficiently leverages Lodging Tax funds to unify, inspire, and lead the local travel industry in marketing Sheridan, Wyoming as a year-round, individual, meeting, incentive and group destination to both domestic and international markets, in a manner that is consistent with Sheridan’s community values.

This tax is not paid by hotel, resort, RV, guest ranch, camp site or motel owners. This tax is not paid by local residents. It is paid only by visitors staying in overnight accommodations. Nearly 76% of voters supported the City-Wide Lodging Tax in the 2016 General Election.

Of Wyoming’s 23 counties Sheridan is one of only five without a County-Wide Lodging Tax. Of these four counties, Sheridan is the most populous, and most heavily reliant on travel and tourism spending.



SHERIDAN TRAVEL & TOURISM BOARD OF COMMISSIONERS

The seven members of the Sheridan Travel & Tourism Board of Commissioners voted unanimously in favor of requesting that the City of Sheridan and the towns of Clearmont, Dayton and Ranchester approve a resolution that will allow the Sheridan County Commissioners to pose to the voting public whether they favor a County-Wide Lodging Tax during November 2018’s General Election.

Additional Lodging Tax revenue will allow Sheridan Travel & Tourism to expand marketing efforts on behalf of Sheridan County in an effort to continue diversifying the local economy, spur economic development, and recruit, retain and attract new businesses.

WHY A COUNTY-WIDE LODGING TAX?

The lack of a County-Wide Lodging Tax puts Sheridan County at a competitive disadvantage with regards to marketing and advertising against other regional tourism destinations such as Bozeman and Deadwood, and even much larger cities, like Billings, Denver and Rapid City.

Sheridan County-based attractions have expressed a desire for marketing assistance and support for a County-Wide Lodging Tax.

Sheridan Travel & Tourism has demonstrated an ability to effectively market attractions across Sheridan County to regional, national and international visitors. Additional funds will allow STT to continue strengthening these marketing efforts to positively impact local businesses.

WYOMING COUNTIES WITH NO COUNTY-WIDE LODGING TAX

	Big Horn County, Wyoming	Sheridan County, Wyoming	Uinta County, Wyoming	Sublette County, Wyoming	Niobrara County, Wyoming
Population estimates, July 1, 2017, (V2017)	11,906	30,210	20,495	9,799	2,397
PEOPLE					
Population					
Population estimates, July 1, 2017, (V2017)	11,906	30,210	20,495	9,799	2,397
Population estimates, July 1, 2016, (V2016)	12,005	30,200	20,773	9,709	2,460
Population estimates base, April 1, 2010, (V2017)	11,668	29,116	21,118	10,247	2,484
Population estimates base, April 1, 2010, (V2016)	11,668	29,116	21,118	10,247	2,484
Population, percent change - April 1, 2010 (estimates base) to July 1, 2017, (V2017)	2.0%	3.8%	-3.0%	-4.4%	-3.5%
Population, percent change - April 1, 2010 (estimates base) to July 1, 2016, (V2016)	2.9%	3.7%	-1.6%	-4.7%	-0.2%
Population, Census, April 1, 2010	11,668	29,116	21,118	10,247	2,484





TRAVEL IS AN ECONOMIC ENGINE

WHY TRAVEL MATTERS TO SHERIDAN COUNTY

TRAVEL-GENERATED SPENDING

\$108.5
MILLION

TRAVEL-GENERATED JOBS

1,050
JOBS

TRAVEL-GENERATED TAXES

\$6.2
MILLION

TRAVEL & TOURISM WORKS FOR SHERIDAN COUNTY 2017 data

- In 2017, Sheridan County welcomed **378,000** overnight visitors.
- Domestic and international travelers spent \$108.5 million in Sheridan County and contributed \$2.4 million in sales taxes or 12% of all sales tax collections. Travel generated tax revenues help support infrastructure and public services.
- If not for the taxes generated by the travel and tourism industry, the average household in Sheridan County would pay **\$494** more in taxes for existing government services.
- The **1,050** jobs created by travelers represent **5%** of Sheridan County's total private industry employment.
- Without the jobs generated by the travel industry, the 2016 Sheridan County unemployment rate of **5%** would have been **10%**.

TRAVEL & TOURISM IS CRITICAL TO WYOMING'S ECONOMY 2017 data

Travel and Tourism is Wyoming's Second-Largest Industry

- Wyoming welcomed **8.7 million** overnight visitors.
- Domestic and international visitors in Wyoming spent over **\$3.5 billion** in 2017. This is equivalent to \$9.8 million per day, \$407,648 per hour, \$6,794 per minute and \$113 per second.
- Visitor spending directly affected Wyoming's economy by generating **\$188 million** in local and state tax revenue.
- Each Wyoming household would pay approximately **\$804** more in taxes without the tax revenue generated by the travel and tourism industry.
- **3.7%** of Wyoming's gross domestic product (GDP) is attributed to travel and tourism.

Travel and Tourism is One of Wyoming's Largest Employers

- Travelers to the state supported **45,690** jobs in Wyoming, including 32,120 directly in the industry and 13,570 in other industries.
- Travel spending directly generated **\$923 million** in payroll for those employed in the Wyoming travel industry.
- **1 in every 8** Wyoming non-farm jobs is supported (directly, indirectly or induced) by the leisure and hospitality industry.
- Leisure and hospitality is the **largest employer** among all private industries in Wyoming.
- Without travel and tourism jobs, Wyoming's 2016 unemployment rate would have gone from **4.2%** to **15.1%**.

Source: Dean Runyan Associates, Travel Impact Report, April 2017; U.S. Bureau of Economic Analysis; U.S. Bureau of Labor Statistics



Office of Tourism

TRAVELWYOMING.COM | #THATSWY | #NTTW17 | CONNECT WITH US

Lodging Tax in the Mountain West

Comparing City Rates

Sheridan's Lodging-Tax rate trails all major regional competitors

CO

Denver, Colorado

10.75% City of Denver Lodging Tax
4% County Lodging Tax

MT

Billings, Montana

4% Lodging Facilities Use Tax
3% Lodging Facilities Sales Tax
\$2 Tourism Improvement District Tax

SD

Deadwood, South Dakota

\$4 Tourism Improvement District Tax
1% Lodging and Occupancy Tax

Tourism Provides Jobs

In Sheridan County, the travel and tourism industry provides more than 1,000 full-time and part-time jobs in hospitality, recreation, food service, and more.

Tourism Grows the Economy

Tourism spending in Sheridan County is worth more than \$100 million annually. Even modest growth means big revenue return for local business.

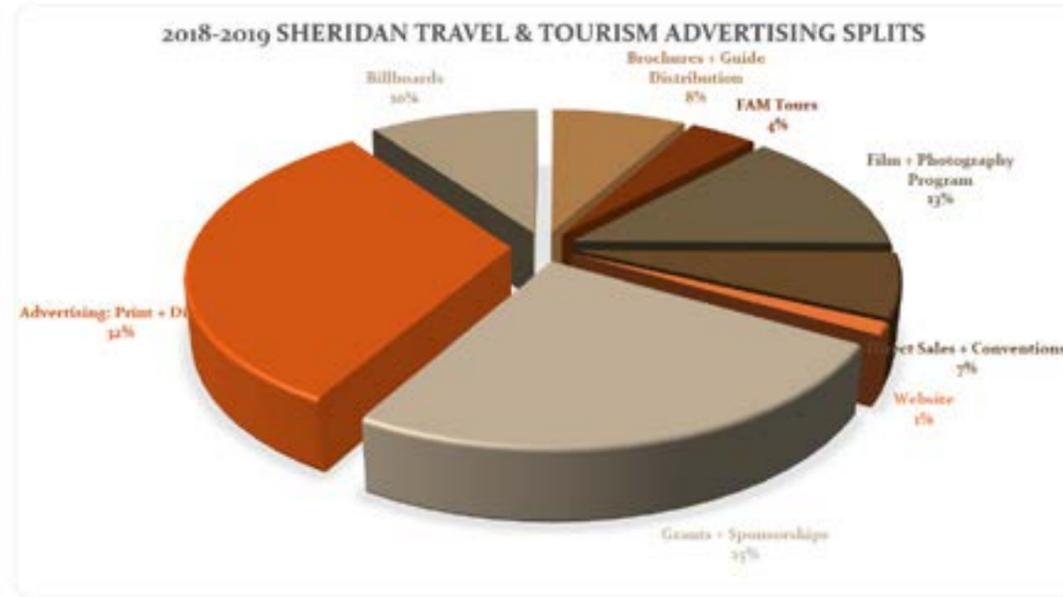
Expanding Marketing Efforts

Additional lodging tax revenue will allow Sheridan Travel & Tourism to effectively and efficiently advertise on behalf of tourism-related businesses across Sheridan County.

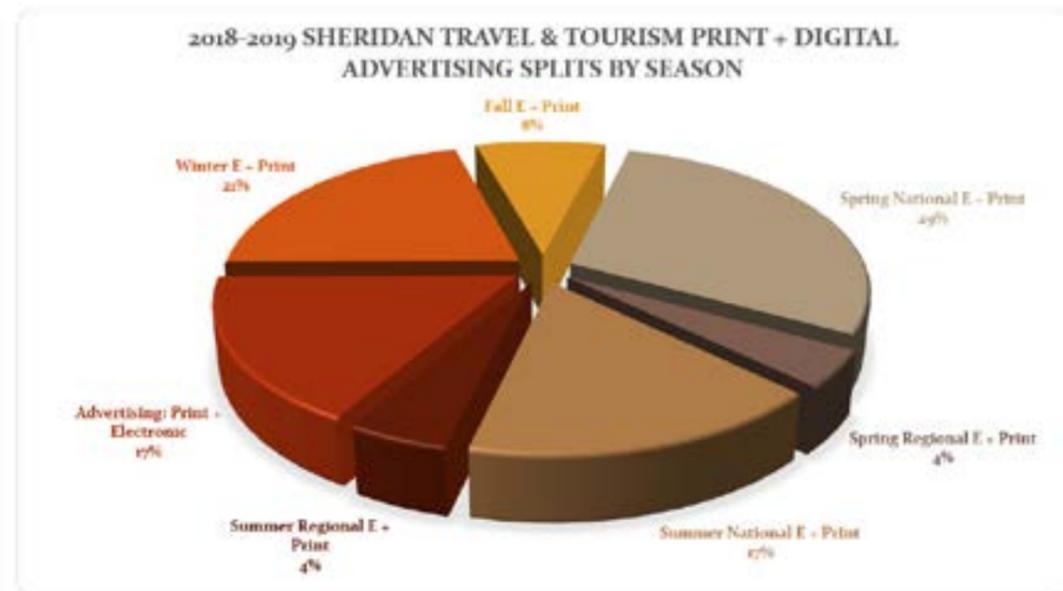


**2018-2019 PROMOTIONAL BUDGET SPLITS
CURRENT TRAVEL & TOURISM BUDGET**

Asset Type	Amount
Advertising: Print + Digital	\$ 120,500
Billboards	\$ 38,000
Brochures + Guide Distribution	\$ 30,000
FAM Tours	\$ 15,000
Photography Program	\$ 50,000
Direct Sales + Conventions	\$ 25,500
Website	\$ 5,000
Grants + Sponsorships	\$ 95,000
TOTAL:	\$379,000



Asset Type	Amount
Advertising: Print + Electronic	\$ 30,000
Winter E + Print	\$ 25,000
Fall E + Print	\$ 30,000
Spring National E + Print	\$ 35,000
Spring Regional E + Print	\$ 5,000
Summer National E + Print	\$ 20,000
Summer Regional E + Print	\$ 5,500
TOTAL:	\$120,500



**COUNTY-WIDE REVENUE ESTIMATES AND
MARKETING AND ADVERTISING SUMMARY**

SHERIDAN COUNTY-WIDE LODGING TAX REVENUE ESTIMATES				
Sheridan County Lodging Inventory	Total Rooms:	414	Average Daily Rate (ADR):	\$146
	Lodging Tax / room / day			\$5.84
	Lodging Tax / County / day / 100% capacity			\$2,417.76
	Lodging tax / county / year / 100% capacity			\$882,482.40
	Lodging tax / county / year / 50% capacity			\$441,241.20
	Lodging tax / county / year / 25% capacity			\$220,620.60

MARKETING EFFORTS WITH COUNTY LODGING TAX REVENUE

\$300,000 in addition revenue is used a baseline for the following examples.

Increase Sheridan's domestic and international marketing presence with print, digital and editorial marketing campaigns in destinations like the Pacific Northwest, Texas, Illinois, Minnesota, as well as Germany, England, China and Canada, by launching consumer-focused campaigns that highlight Sheridan's unique history and cultural legacy (polo, rodeo, ranching, outdoor recreation, wildlife, the arts, local businesses, etc).

- 30% of budget for print + digital advertising: \$90,000
- 7% of budget for direct sales, conferences and conventions: \$21,000

Increase strategic partnerships with local businesses through Sheridan Travel & Tourism's grants and sponsorships program. This program helps fund events like 3rd Thursday, the WYO Rodeo, Suds N' Spurs Brewfest, Snickers Cup, Dead Swede Hundo, and many more.

- 25% of budget for grants and sponsorships: \$75,000

Increase film industry relations and partnerships, create more promotional videos, and host additional film industry location scouts, producers, directors, and writers. Create our own regionally-focused film incentive program. Increase frequency of media and tour operator familiarization tours to generate exposure for Sheridan County (a recent article in USA Today's Go Escape Magazine featuring outdoor recreation in the Bighorn Mountains was worth more than \$150,000 in editorial value to the community. A AAA Magazine feature on Sheridan County was worth more than \$350,000 in editorial value).

- 15% of budget for film and media program: \$45,000

Increase distribution of Sheridan visitor guides and visitor packets, both in print and digital form.

- 10% of budget for visitor engagement marketing: \$30,000

Increase shoulder season visitation by working extensively with lodging properties and local businesses to attract and host events in the Spring, Fall and Winter, leveraging Sheridan's unique seasonality.

- 10% of budget for shoulder-season promotions: \$30,000

Continue to develop www.sheridanwyoming.org as the hub of our marketing and promotion ecosystem with continued focus on all-inclusive booking platform, expanded features on local business, local stories, and more.

- 3% for website development: \$9,000

Sheridan Travel & Tourism does not anticipate hiring new staff with additional Lodging Tax revenue: all additional marketing efforts will be implemented across Sheridan Travel & Tourism's campaigns and programs. Continuing to focus on and grow the local travel and tourism industry is Sheridan County's fastest track to continuing to diversify the local economy, spur economic development, and recruit, retain and attract new businesses, families, and individuals.





JOINT POWERS BOARD

A Joint Powers Board (JPB) governing the use of County-Wide Lodging Tax funds would be created following the General Election vote in November 2018.

This JPB would be comprised of members of the local tourism industry representing each of Sheridan County’s municipalities. By Wyoming State Statute, a travel and tourism JPB’s membership is split by revenue participation. Members of the JPB would be selected by the City of Sheridan and Sheridan County.

The current Sheridan Travel & Tourism Board of Commissioners consists of seven members of the local travel and tourism industry. According to state statute, a JPB will likewise consist of members of the local travel and tourism industry, with representatives appointed by the City of Sheridan, the towns of Dayton, Clearmont and Ranchester, and Sheridan County. Statute requires that

The Executive Director of Sheridan Travel & Tourism would report to the Sheridan Travel & Tourism Joint Powers Board.

VOTING ON THE LODGING TAX

Residents vote on the City-Wide Lodging Tax every four years. State Statute allows for a County-Wide vote in 2018 that DOES NOT jeopardize the City-Wide Tax that was renewed in 2016.

The 2018 November General Election will include a vote on the 1% Optional Sales Tax, while the 2020 General Election will include a vote on the Capital Facilities Tax.



ECONOMIC DEVELOPMENT

Lodging tax funds are an integral piece of the Economic Development pie in Sheridan. Without these funds, all aspects of the travel and tourism economy would be negatively impacted. Sheridan Travel & Tourism is a major driving force behind marketing and advertising Fly Sheridan and the Critical Air Service Team. Sheridan Travel & Tourism staff regularly work with the City, County and State of Wyoming on recruiting and expanding local business - efforts include the successful recruitment of Weatherby Inc.

Sheridan Travel & Tourism’s Grants and Sponsorship program supports dozens of community events, including:

- Sheridan WYO Rodeo
- Dead Swede Mountain Bike Races
- 3rd Thursday Street Festivals
- Suds n Spurs Brewfest
- Snickers Big Horn Soccer Cup
- Hoop Jam
- Bike MS Wyoming
- Sheridan Recreation Dept. Events
- The Whitney Center for the Arts
- ... and many more.

Programs that would not exist without the lodging tax:

- Advertising Campaigns: 40+ International, National and Regional Magazines
- Billboards: 15+ across the Mountain West region
- Social media program: 150,000+ impressions per week
- Newsletter program: 17,500+ high-value leads reached each newsletter
- Conference and event recruitment would be significantly diminished
- Outreach: trade shows, seminars, etc., both regionally and nationally
- 15,000 informational packets mailed annually
- 50,000 brochures distributed annually
- #1 ranked Visitor’s Center in the State of Wyoming
- 120,000+ visitors per year (20,000 per month during summer months)

SOCIAL MEDIA REACH 47,750 FACEBOOK FANS	# OF OVERNIGHT VISITORS 378,000 IN 2017	FORBES MAGAZINE “WY’S COOLEST SMALL TOWN”
AVG. SUMMER OCCUPANCY +73.5%	USA TODAY NATIONAL STORY WINTER IN THE BIGHORNS	AAA MAGAZINE NATIONAL STORY EATON’S RANCH





Sheridan Travel & Tourism has always worked tirelessly to promote the attractions of Sheridan County. Guest ranches, the Bighorn Mountains, events like the Dead Swede and Bighorn Trail Run, the Brinton Museum, Fort Phil Kearny and many other destinations are essential components of the Sheridan experience, and routinely feature in the marketing efforts of Sheridan Travel & Tourism.

Familiarization and media tours have included County partners like Canyon and Eaton's Ranch, Bear Lodge, Forest Service tours of Sibley Lake, Steamboat Point and Tongue River Canyon, visits to restaurants, galleries and shops in Dayton and Ranchester, cooperative marketing efforts with The Ranch at UCross, and more. County attractions feature prominently in our print, digital and social media marketing in both domestic and international markets.

The following pages feature just some of the advertising material we have created that feature Sheridan County events, destinations and attractions.



MARKETING SHERIDAN COUNTY



Welcome to the Thrillsaeker's wonderland. The Wyoming experience lives in every ponderosa pine, alpine lake, worn-out saddle and secret canyon in Sheridan County. Summit the legendary peaks of the Bighorn Mountains, crush fresh powder on skis or sleds, and hike into some of America's most remote wilderness. Adventure lives at the base of the Bighorns. www.sheridanwyoming.org

BEAUTIFUL HIKING TRAILS

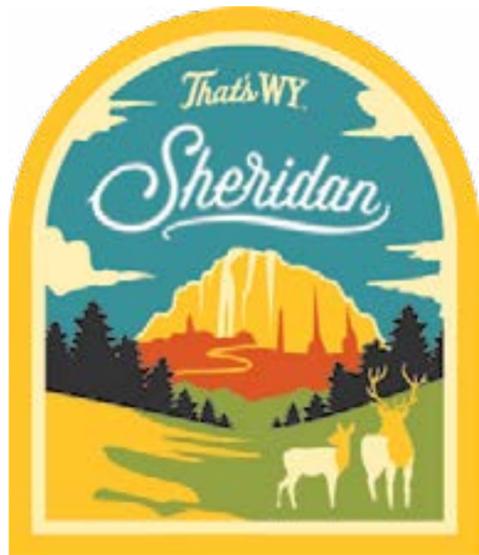
Hike 22 miles of the Cloud Peak Wilderness, from the Coffeen Park Trailhead to Lake Geneva, Crystal Lake, and on to Robin Lake, on one of the most scenic hikes in WY.

EPIC CLIMBING ROUTES

Edward's Crack, a 5.9 in Tongue River Canyon, features traditional protection, and a lower grade and striking splitter that make it one of WY's best limestone climbs.

WILD RUNNING TRAILS

The 18M course of the Bighorn Mountain Run begins at the head of the Dry Fork and crests at Camp Creek Ridge at 8,100 feet before descending through the mountains.



FOR CONSIDERATION:

Question: Will voting on a 4% County-Wide Lodging Tax jeopardize the 1-Cent Optional Sales Tax?

Answer: No. The current 4% City-Wide Lodging Tax is already voted on every four years. The 1-Cent Optional Sales Tax and the Lodging Tax benefit from strong public support and strong educational campaigns that promote the positive uses and economic impacts of these measures.

Q: How do we know that Lodging Tax revenue will be used to effectively market attractions and communities across Sheridan County?

A: The Joint Powers Board, comprised of members from across Sheridan County, oversee the marketing and advertising efforts of Sheridan Travel & Tourism to ensure that each community is represented fairly and adequately.

Q: What can Sheridan Travel & Tourism do with additional revenue that it cannot do now?

A: Sheridan Travel & Tourism's current budget is small when compared against other communities that rely heavily on tourism spending. An increase in revenue will allow STT to reach potential visitors in additional domestic markets (Washington State, Oregon, Illinois, Minnesota, Texas) and international markets (France, Germany, UK, China) based on demand for and interest in western experiences and attractions. STT will increase digital marketing efforts, be able to further assist in developing and supporting major events in outdoor recreation, culture and the arts, and youth sports. An increase in visitation and development in the local tourism industry will result in additional revenue for local business owners, additional jobs across Sheridan County, and organic growth for Sheridan that will help ensure vibrancy. For more information see page 6.

Q: Why should local communities agree to more taxes?

A: It is important to remember that the Lodging Tax is only paid by overnight guests staying in hotels, motels, RV parks, guest ranches and camp grounds. It is not paid by local residents. Keep in mind that legislators in the State of Wyoming are already considering a State-Wide Lodging Tax; controlling a County-Wide Lodging Tax allows local communities to control their own advertising, marketing and promotional messaging.

Q: Who will decide how money is spent?

A: Sheridan Travel & Tourism is responsible for preparing an annual budget that must be approved by the members of the Joint Powers Board before it is executed each year.



Sheridan

—WYOMING—

2018

BEST SMALL TOWN CULTURAL SCENE, 4TH PLACE — USA TODAY
BEST CRAFT BEER BAR IN WYOMING, BLACK TOOTH — CRAFTBEER.COM

2017

BEST PLACE TO LIVE LIKE AN OLD WEST COWBOY — TRUE WEST MAGAZINE
BEST PROMOTION OF AN HISTORIC PLACE — TRUE WEST MAGAZINE
THE WEST'S BEST MAIN STREETS, RUNNER UP — SUNSET MAGAZINE
1,000 PLACES TO SEE IN THE US AND CANADA BEFORE YOU DIE
BEST WYOMING ATTRACTION, 3RD PLACE — USA TODAY
25 HAPPIEST SMALL TOWNS IN AMERICA — COUNTRY LIVING MAGAZINE

2016

TOP WESTERN TOWNS: WHERE HISTORY LIVES — TRUE WEST MAGAZINE
BEST PLACE TO RAISE AN OUTDOOR FAMILY, RUNNER UP — ELEVATION OUTDOORS

2015

BEST TOWN IN AMERICA, FINALIST — OUTSIDE MAGAZINE
TOP 100 SMALL TOWNS IN THE USA — LIVABILITY MAGAZINE

2014

BEST PLACE TO LIVE LIKE AN OLD WEST COWBOY — TRUE WEST MAGAZINE
BEST TOWN IN AMERICA, FINALIST — OUTSIDE MAGAZINE
TOP 10 MOUNTAIN TOWNS IN THE USA — NORTH AMERICAN HUNTER MAGAZINE
TOP 20 SMALL TOWNS IN THE USA, #2 — CITY DESCRIBED
TOP 15 TRAILS IN THE WEST — SNOWEST

2013

BEST SMALL TOWNS — BEST OF THE ROAD
TOP 15 TRAILS IN THE WEST — SNOWEST

2012

TOP 100 ADVENTURE TOWNS — NATIONAL GEOGRAPHIC ADVENTURE
TOP 10 BEST SMALL TOWNS — LIVABILITY
TOP 15 TRAILS IN THE WEST — SNOWEST