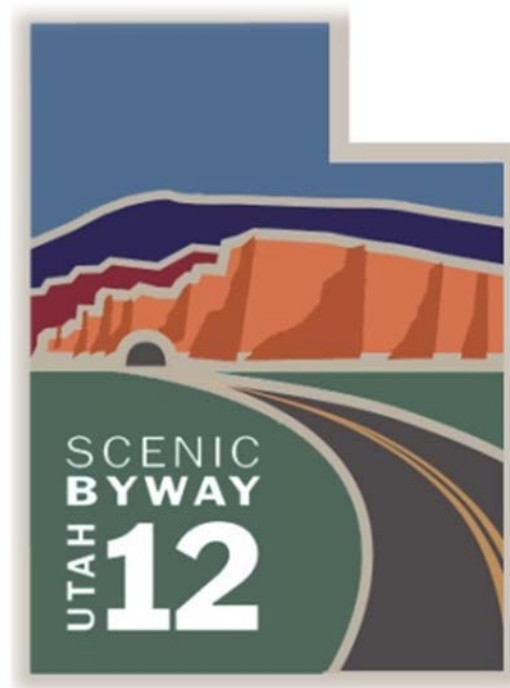


Economic Impacts of Scenic Byway 12

June 17, 2014



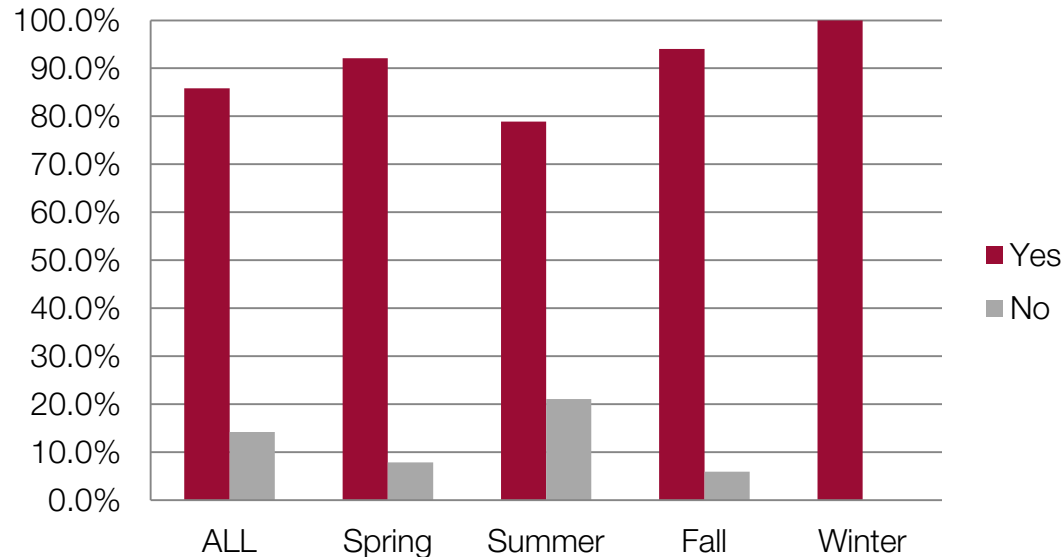
- Review surveys
 - Visitor Surveys
 - Online Surveys
 - Business Owner Surveys
- Economic Impacts of the Byway
- Case Studies
- Visitation and Sales Trends
- Discussion/Questions?



1. Did you know that you were traveling a scenic byway for approximately 124 miles between Torrey and Panguitch?

	ALL	Spring	Summer	Fall	Winter
n=	479	165	242	67	5
Yes	85.8%	92.1%	78.9%	94.0%	100.0%
No	14.2%	7.9%	21.1%	6.0%	0.0%

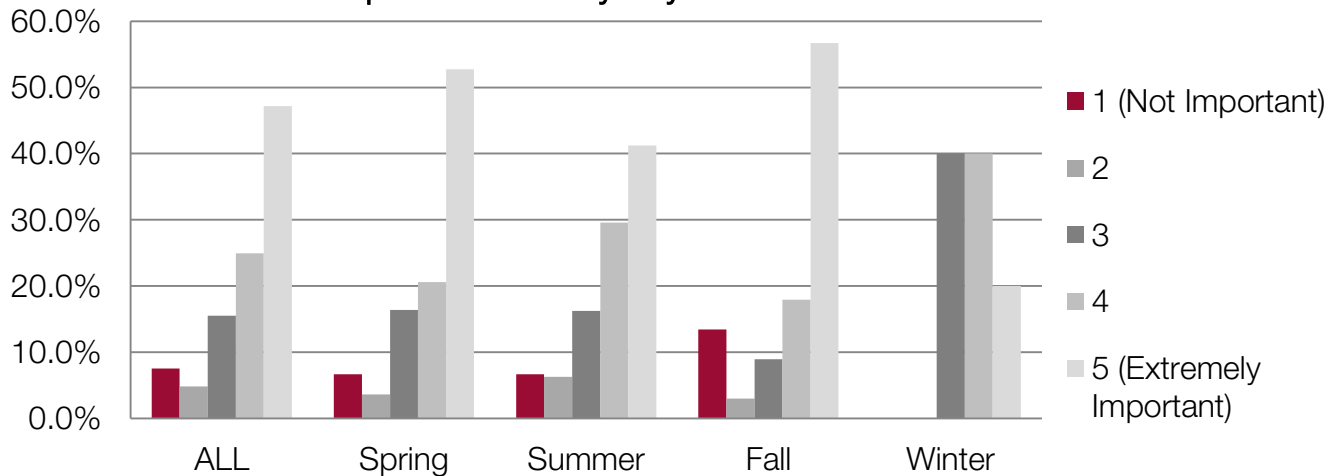
Knowledge of Scenic Byway



2. On a scale of 1 to 5, with 1 meaning not important and 5 meaning extremely important, how important was the scenic byway designation in your decision to travel this route?

	ALL	Spring	Summer	Fall	Winter
<i>n=</i>	477	165	240	67	5
Average Score	3.99	4.09	3.93	4.01	3.80
1	7.5%	6.7%	6.7%	13.4%	0.0%
2	4.8%	3.6%	6.3%	3.0%	0.0%
3	15.5%	16.4%	16.3%	9.0%	40.0%
4	24.9%	20.6%	29.6%	17.9%	40.0%
5	47.2%	52.7%	41.3%	56.7%	20.0%

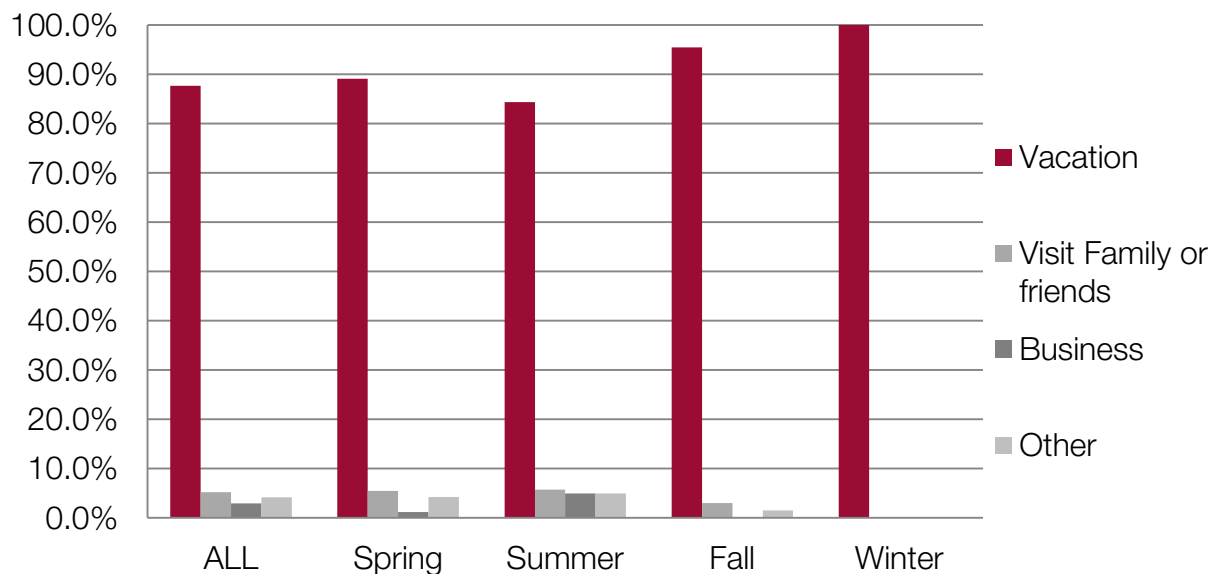
Importance of Byway in Travel Decision



3. What is the main purpose of your trip today?

	ALL	Spring	Summer	Fall	Winter
<i>n=</i>	479	165	243	66	5
Vacation	87.7%	89.1%	84.4%	95.5%	100.0%
Visit Family or friends	5.2%	5.5%	5.8%	3.0%	0.0%
Business	2.9%	1.2%	4.9%	0.0%	0.0%
Other	4.2%	4.2%	4.9%	1.5%	0.0%

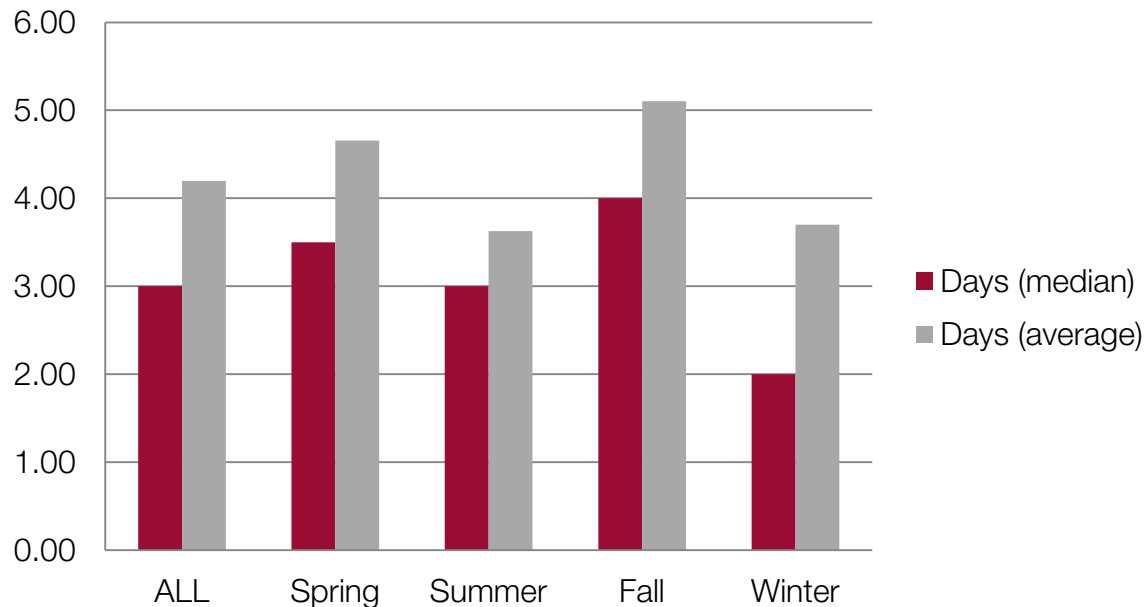
Main Purpose of Trip



4. Estimating to the nearest half day, for how many days do you expect to be in the Scenic Byway 12 area indicated on the accompanying map?

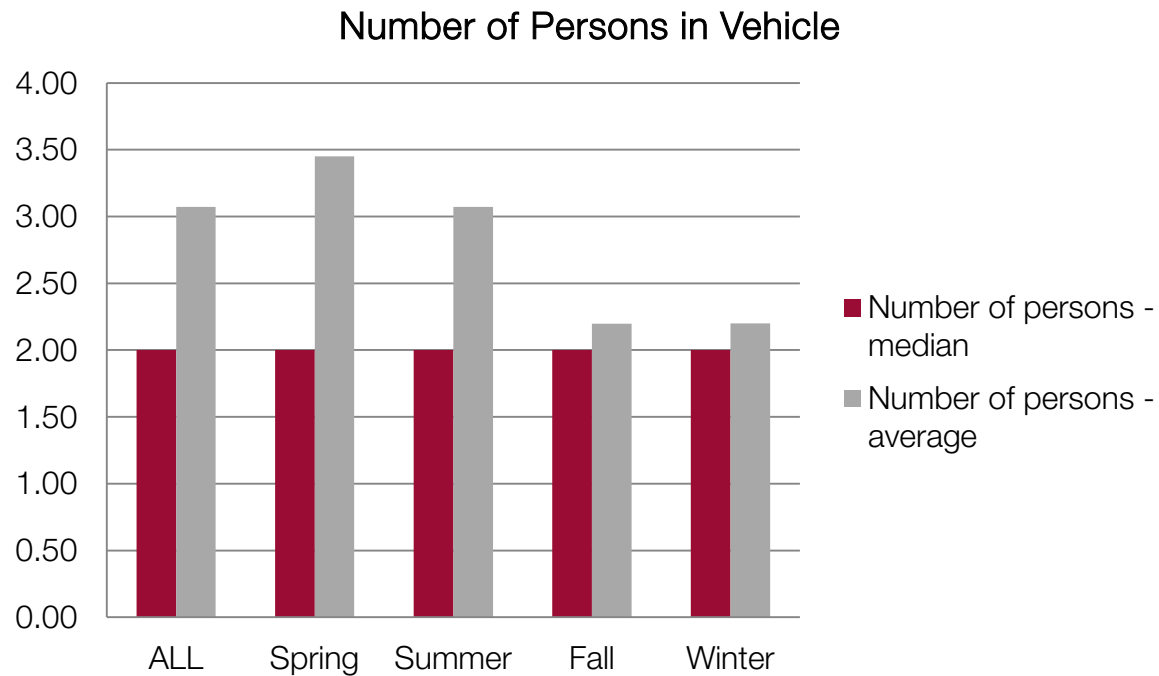
	ALL	Spring	Summer	Fall	Winter
<i>n=</i>	413	138	212	59	4
Days (median)	3.00	3.50	3.00	4.00	2.00
Days (average)	4.20	4.66	3.63	5.10	3.70

Number of Days on the Byway



5. How many people, including yourself, are traveling with you in your vehicle?

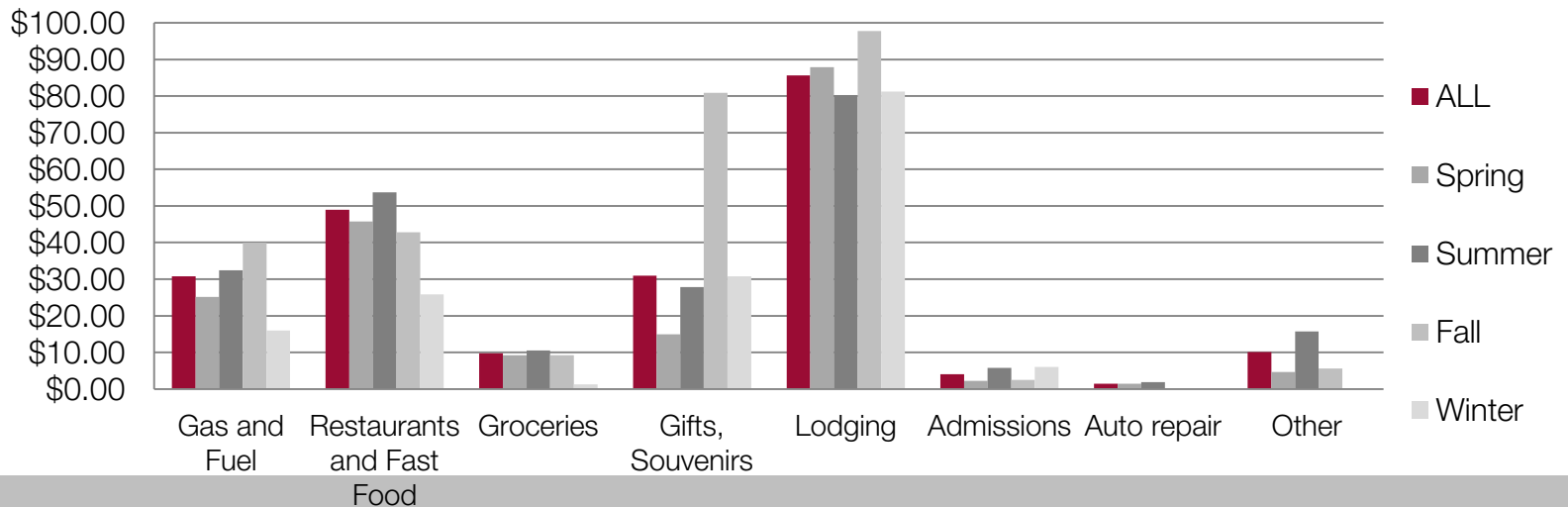
	ALL	Spring	Summer	Fall	Winter
<i>n=</i>	474	160	243	66	5
Number of persons - median	2.00	2.00	2.00	2.00	2.00
Number of persons - average	3.07	3.45	3.07	2.20	2.20



6. Please tell us the total expenditures for your traveling group while in the Scenic Byway area.

Average per Group per Day	ALL
Gas and Fuel	\$30.76
Restaurants and Fast Food	\$48.97
Groceries	\$9.75
Gifts, Souvenirs	\$30.96
Lodging	\$85.64
Admissions	\$4.01
Auto repair	\$1.43
Other	\$10.06
TOTAL	\$221.58

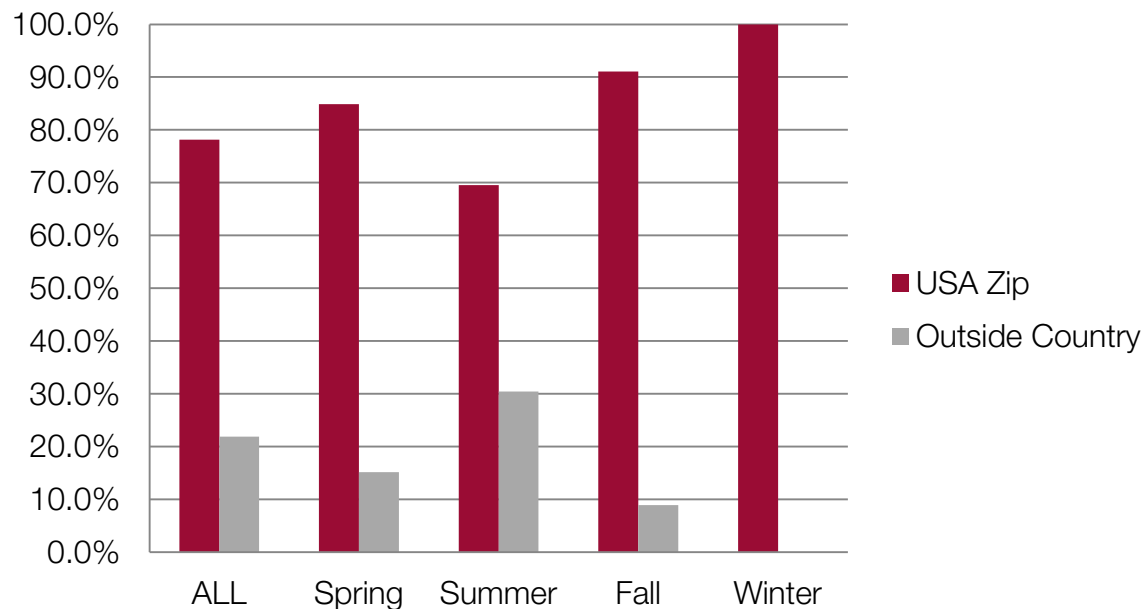
Total Expenditures - Average per Group per Day



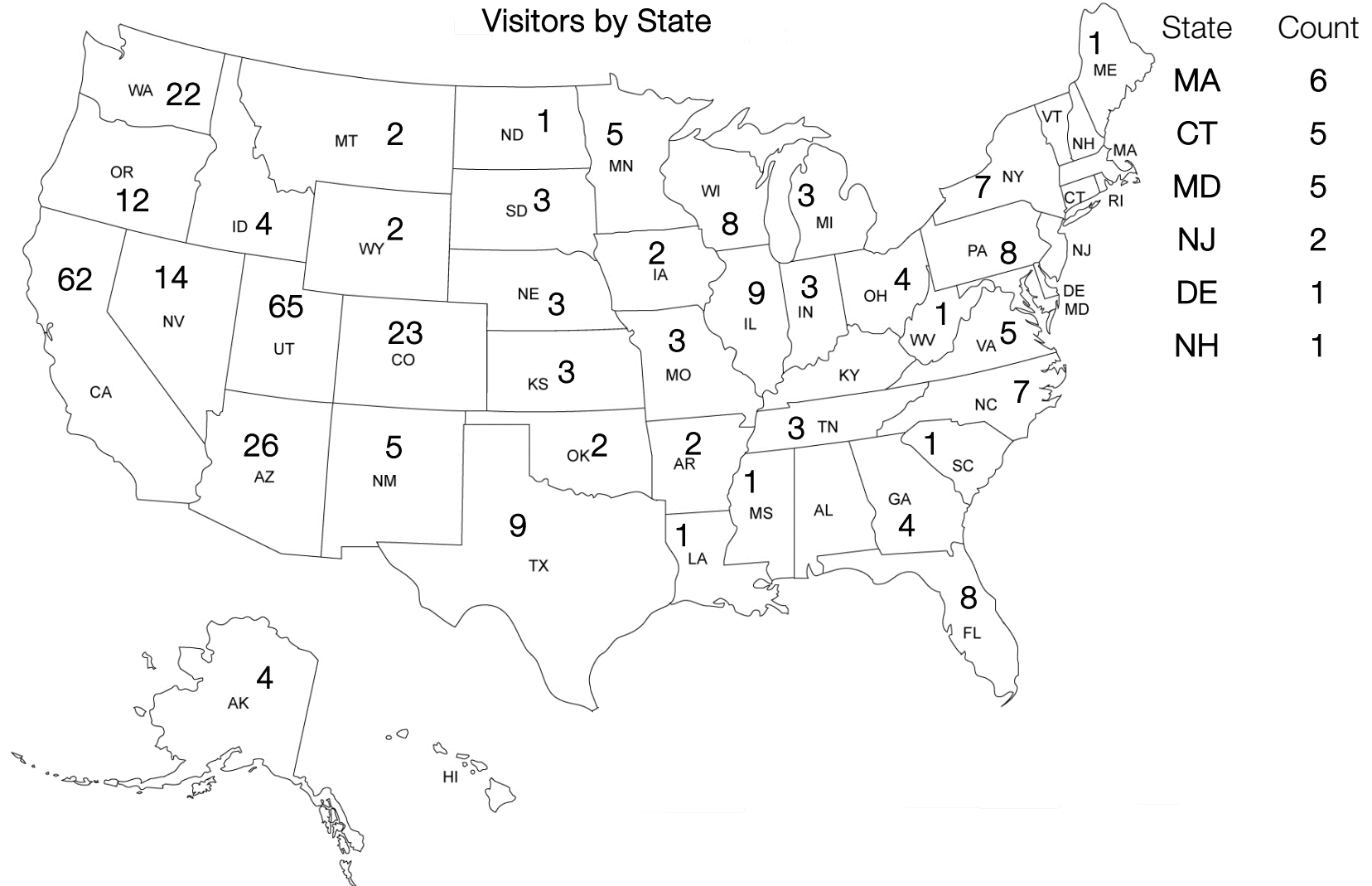
7. Where are you from? If from USA, please indicate the postal/zip code where you receive your mail. If from outside the USA, please indicate your country of origination.

	ALL	Spring	Summer	Fall	Winter
<i>n=</i>	480	165	243	67	5
USA Zip	78.1%	84.8%	69.5%	91.0%	100.0%
Outside Country	21.9%	15.2%	30.5%	9.0%	0.0%

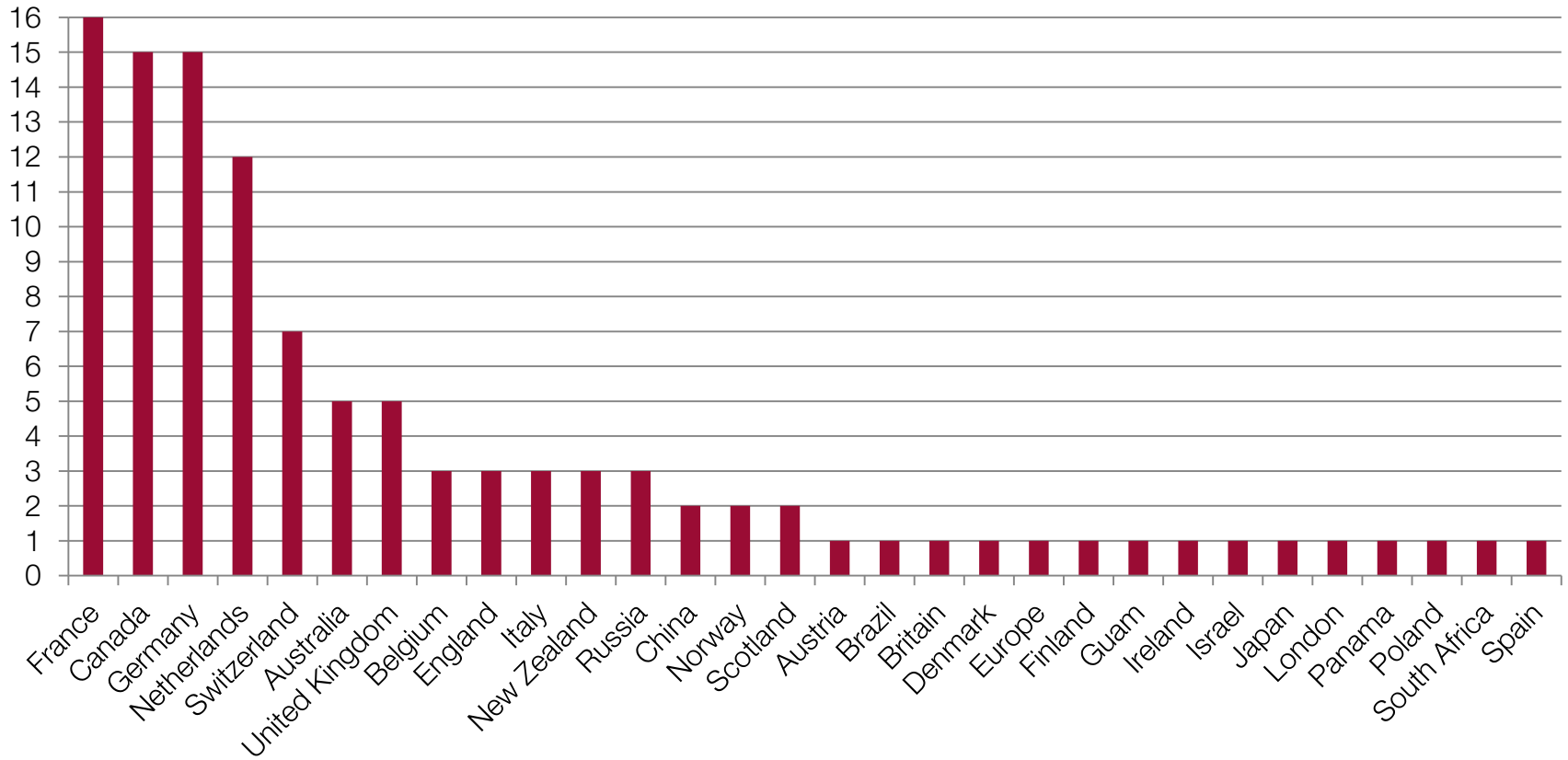
Respondent Place of Origin



Visitors by State

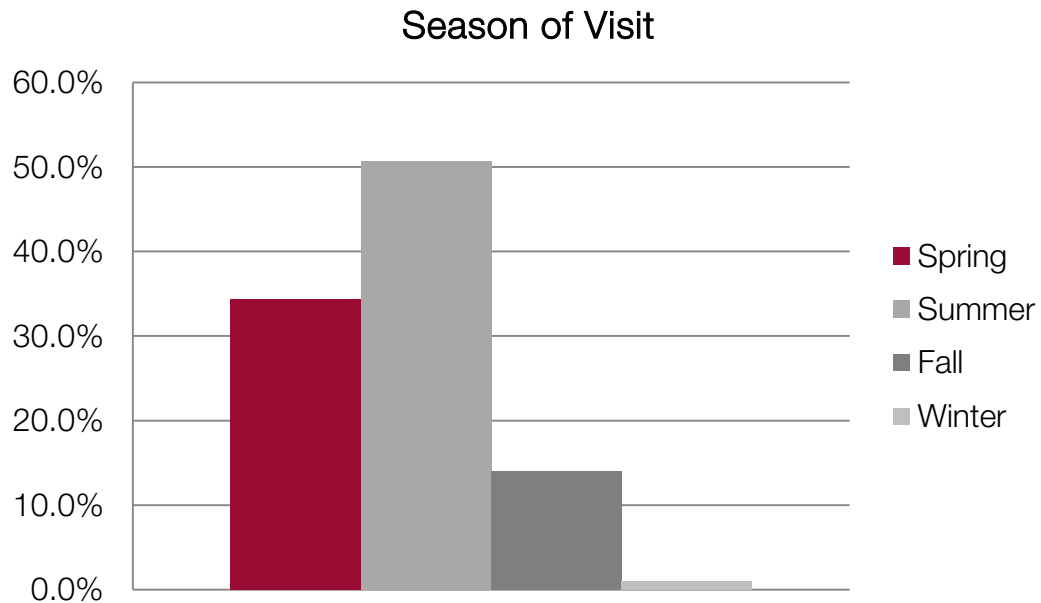


Foreign Visitors by Country



8. Which season best describes this visit to the Scenic Byway 12 region?

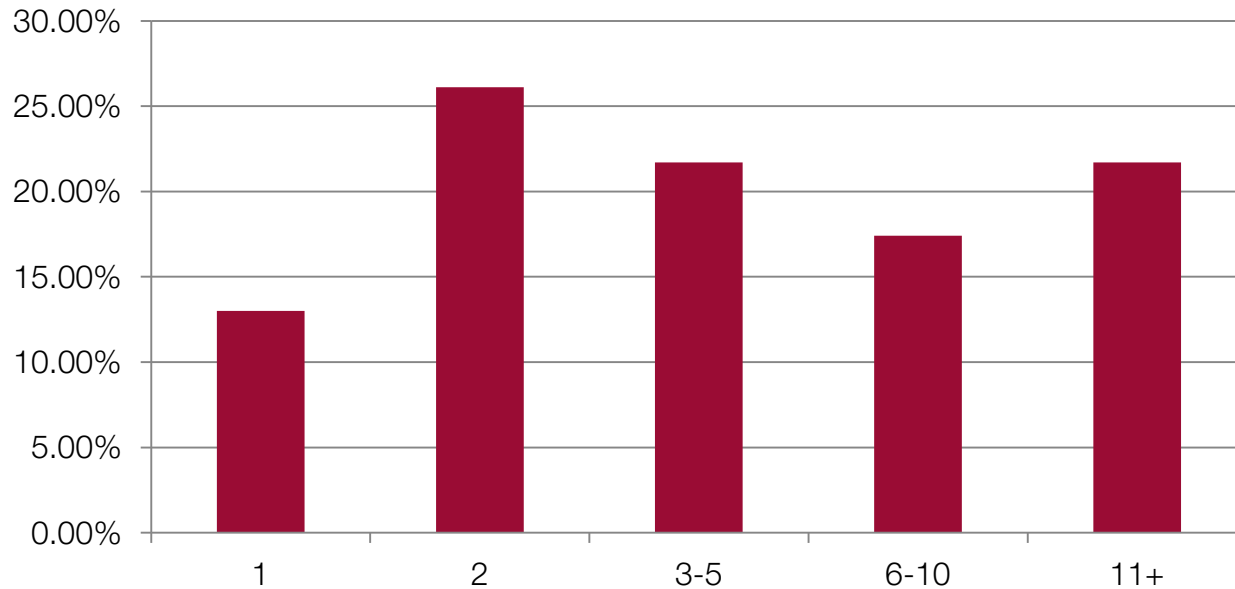
	ALL
<i>n</i> =	480
Spring	34.4%
Summer	50.6%
Fall	14.0%
Winter	1.0%



1. How many times have you made separate trips to the Scenic Byway?

<i>n</i> =	23
1 time	13.0%
2 times	26.1%
3-5 times	21.7%
6-10 times	17.4%
11+ times	21.7%

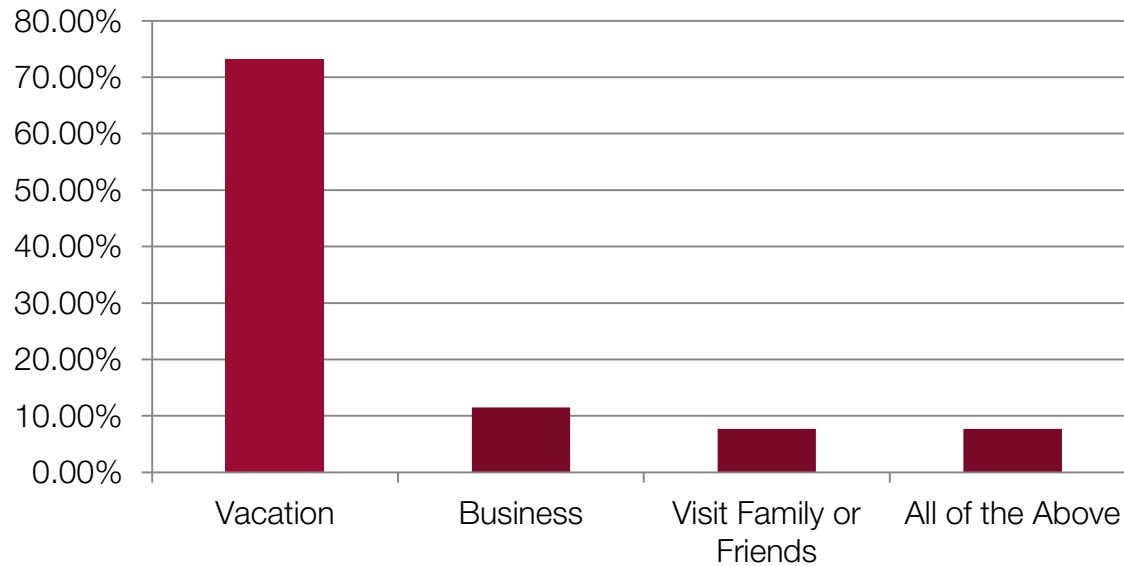
Number of Visits



2. What was the main purpose for your most recent trip?

<i>n</i> =	26
Vacation	73.1%
Business	11.5%
Visit Family or Friends	7.7%
All of the Above	7.7%

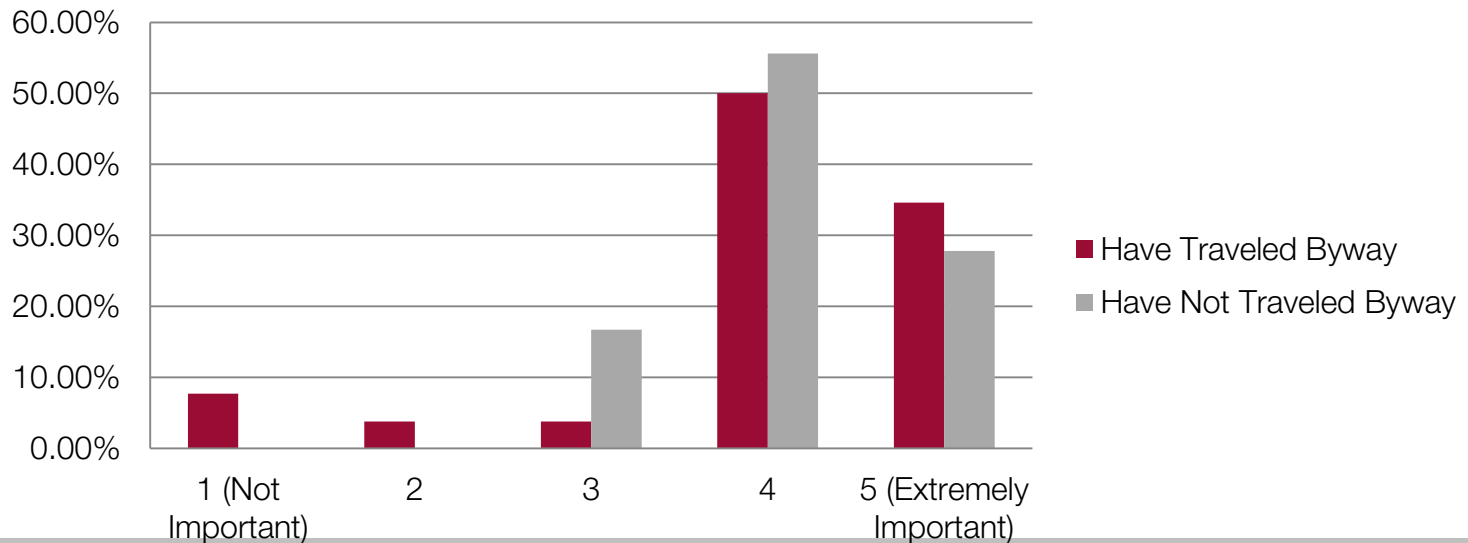
Purpose of Trip



3. For your most recent trip, how important was the scenic byway designation in your decision to travel this route? (or whether or not to visit?)

	<i>Those that Have Traveled the Byway</i>	<i>Those that Have NOT yet Traveled the Byway</i>
<i>n =</i>	<i>26</i>	<i>18</i>
1 (Not Important)	7.7%	0.0%
2	3.8%	0.0%
3	3.8%	16.7%
4	50.0%	55.6%
5 (Extremely Important)	34.6%	27.8%

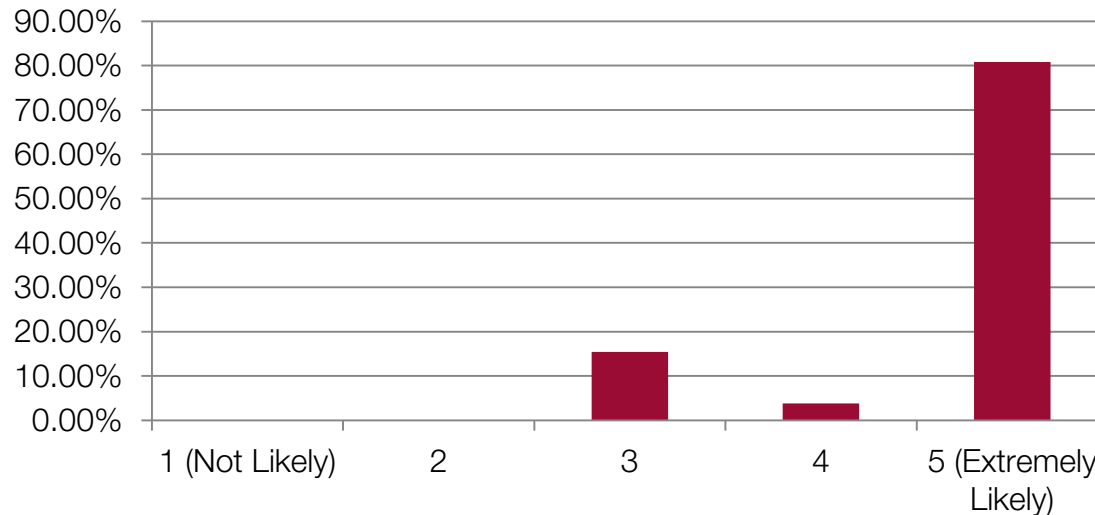
Importance of Scenic Byway Designation



4. How likely will you be to travel the Scenic Byway again within the next five years?

<i>n</i> =	26
1 (Not Likely)	0.0%
2	0.0%
3	15.4%
4	3.8%
5 (Extremely Likely)	80.8%

Likelihood of Return Visit



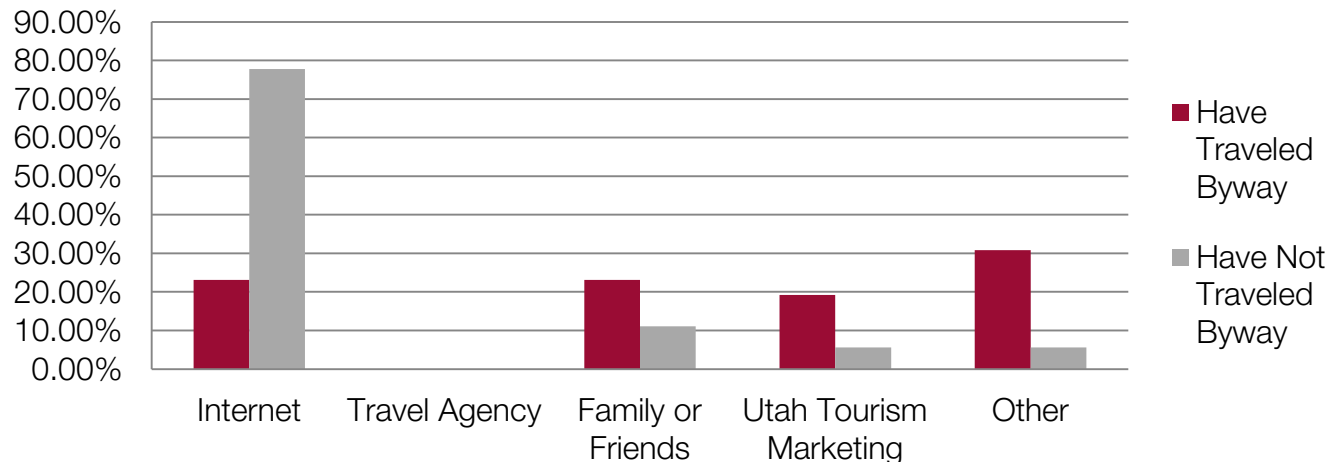
5. Where did you first hear about Scenic Byway 12?

<i>n =</i>	<i>Those that Have Traveled the Byway</i>	<i>Those that Have NOT yet Traveled the Byway</i>
Internet	23.1%	77.8%
Travel Agency	0.0%	0.0%
Family or Friends	23.1%	11.1%
Utah Tourism Marketing	19.2%	5.6%
Other	30.8%	5.6%

“Other” responses:

- found on map
- more interesting road to national parks
- stumbled across it
- long term interest
- Today Show piece

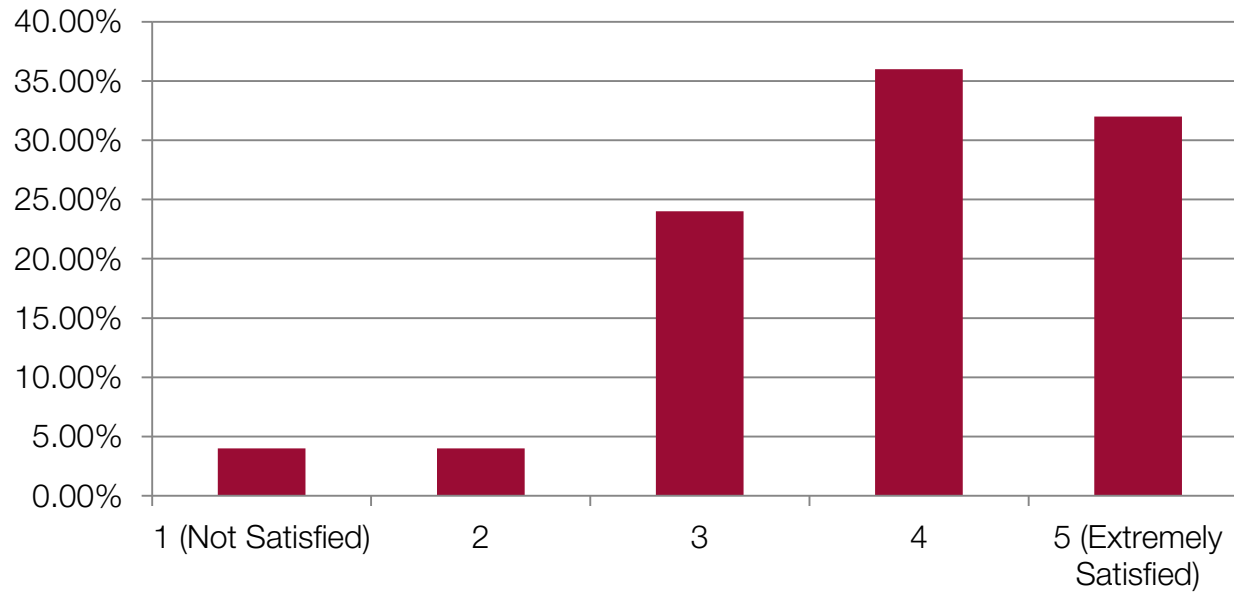
Sources of Byway Information



6. How satisfied were you with the Scenic Byway Route Guide?

<i>n</i> =	25
1 (Not Satisfied)	4.0%
2	4.0%
3	24.0%
4	36.0%
5 (Extremely Satisfied)	32.0%

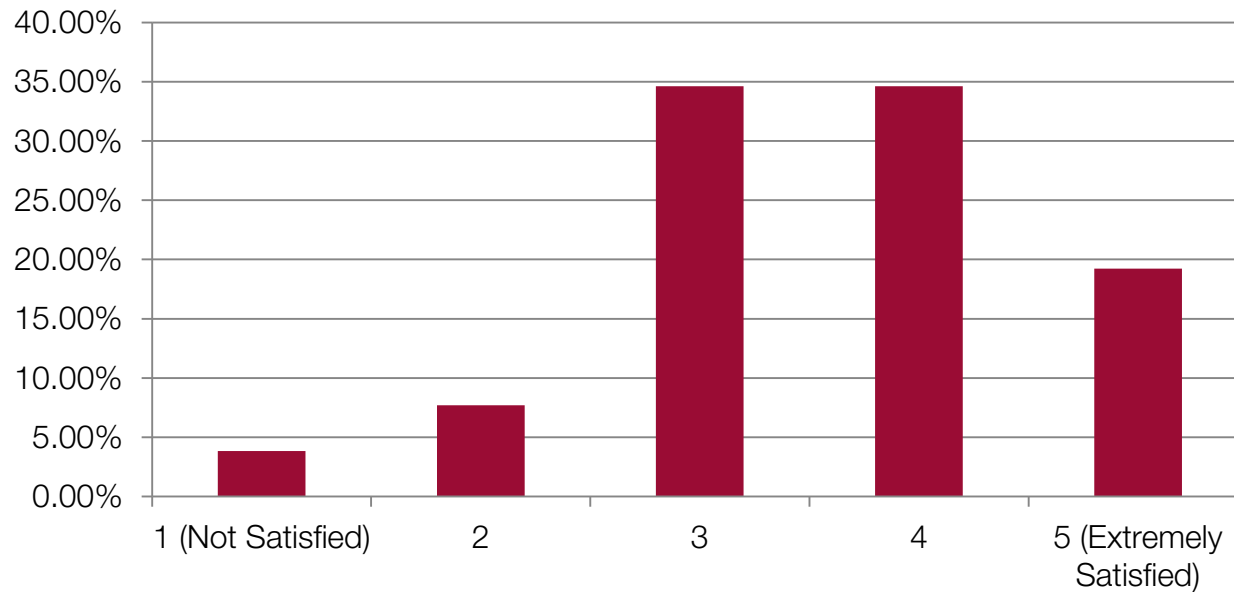
Satisfaction with Scenic Byway Route Guide



7. How satisfied were you with the signage and historical markers?

<i>n</i> =	26
1 (Not Satisfied)	3.8%
2	7.7%
3	34.6%
4	34.6%
5 (Extremely Satisfied)	19.2%

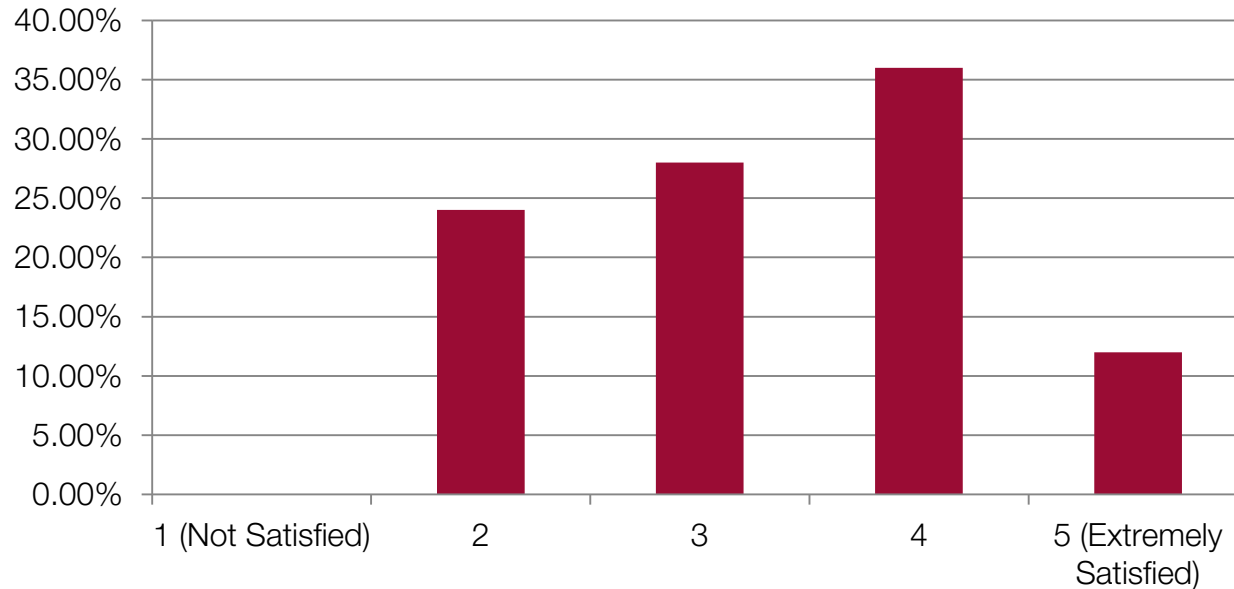
Satisfaction with Signage and Historical Markers



8. How satisfied were you with lodging accommodations?

<i>n</i> =	25
1 (Not Satisfied)	0.0%
2	24.0%
3	28.0%
4	36.0%
5 (Extremely Satisfied)	12.0%

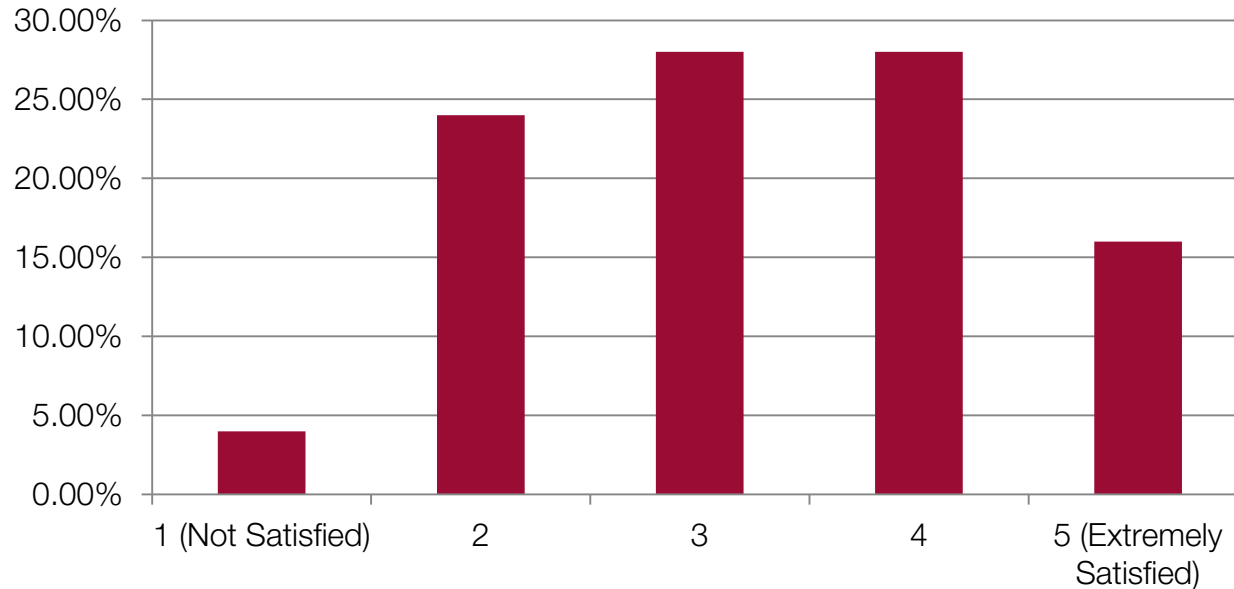
Satisfaction with Lodging Accommodations



9. How satisfied were you with eating places?

<i>n</i> =	25
1 (Not Satisfied)	4.0%
2	24.0%
3	28.0%
4	28.0%
5 (Extremely Satisfied)	16.0%

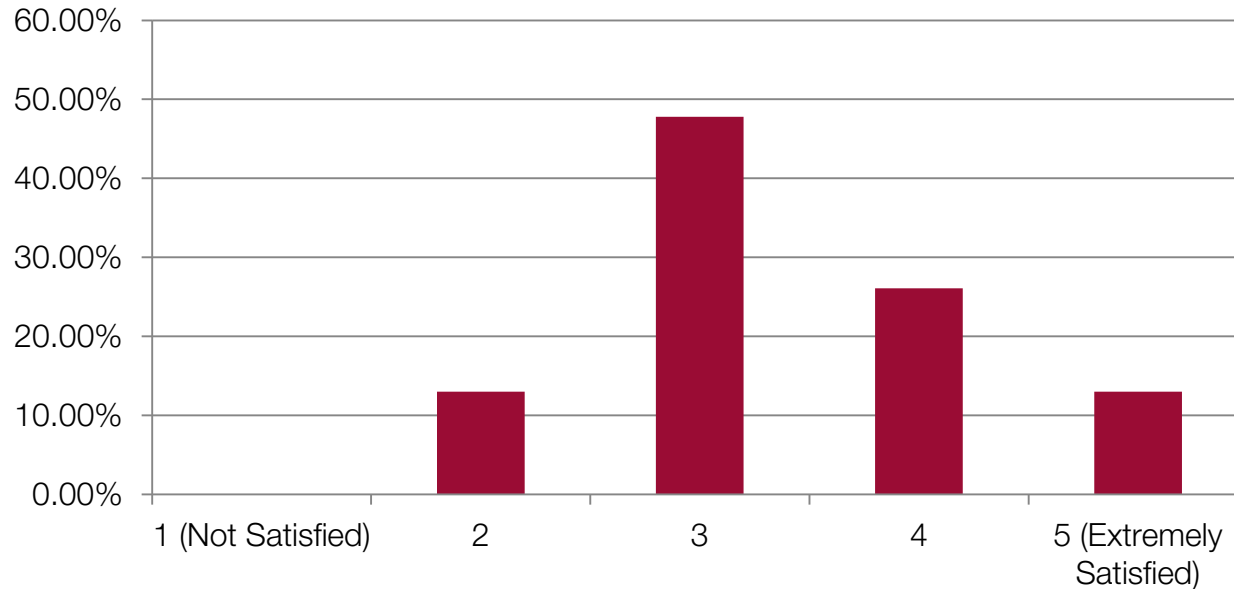
Satisfaction with Eating Places



10. How satisfied were you with shopping opportunities?

<i>n</i> =	23
1 (Not Satisfied)	0.0%
2	13.0%
3	47.8%
4	26.1%
5 (Extremely Satisfied)	13.0%

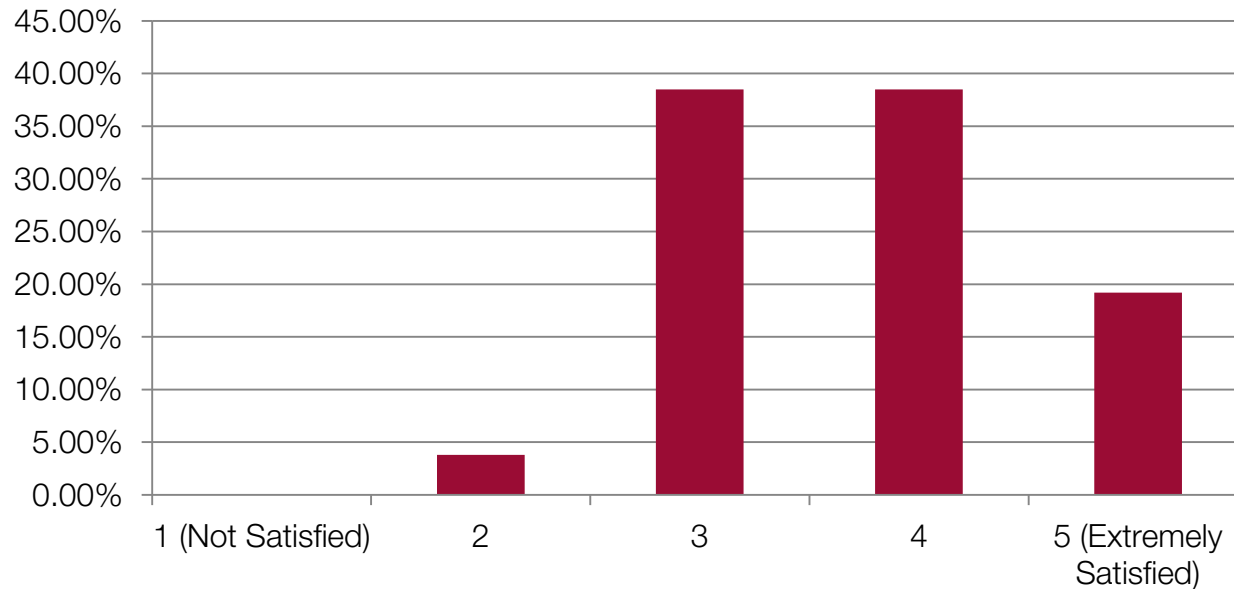
Satisfaction with Shopping Opportunities



11. How satisfied were you with rest and turnout facilities?

<i>n</i> =	25
1 (Not Satisfied)	0.0%
2	3.8%
3	38.5%
4	38.5%
5 (Extremely Satisfied)	19.2%

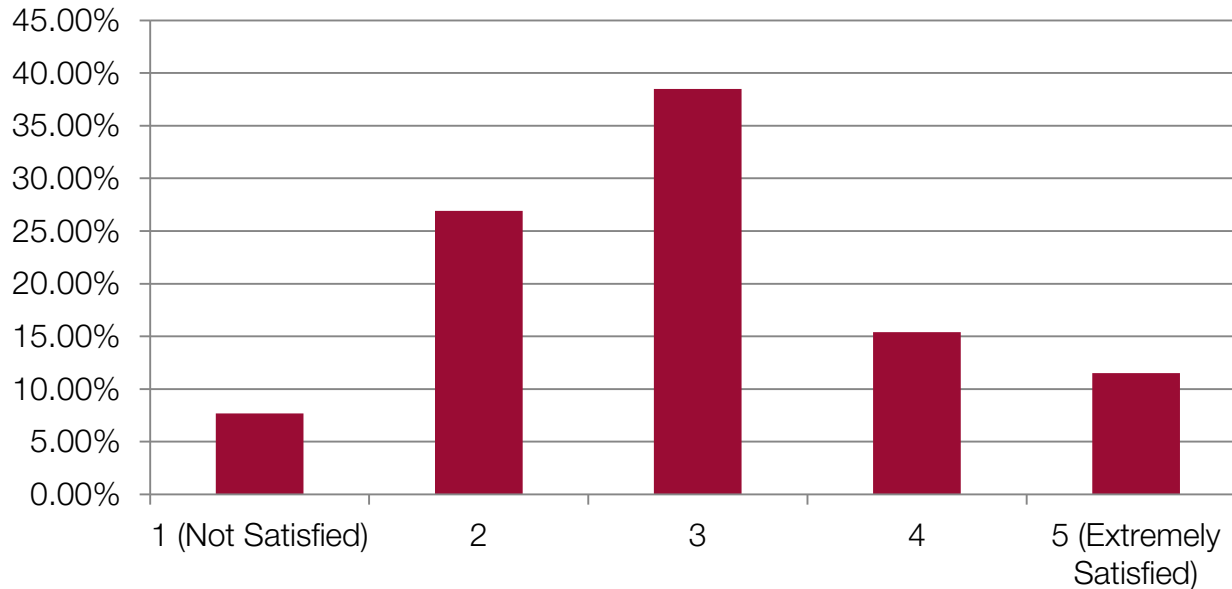
Satisfaction with Rest and Turnout Facilities



12. How satisfied were you with the availability of restrooms?

<i>n</i> =	26
1 (Not Satisfied)	7.7%
2	26.9%
3	38.5%
4	15.4%
5 (Extremely Satisfied)	11.5%

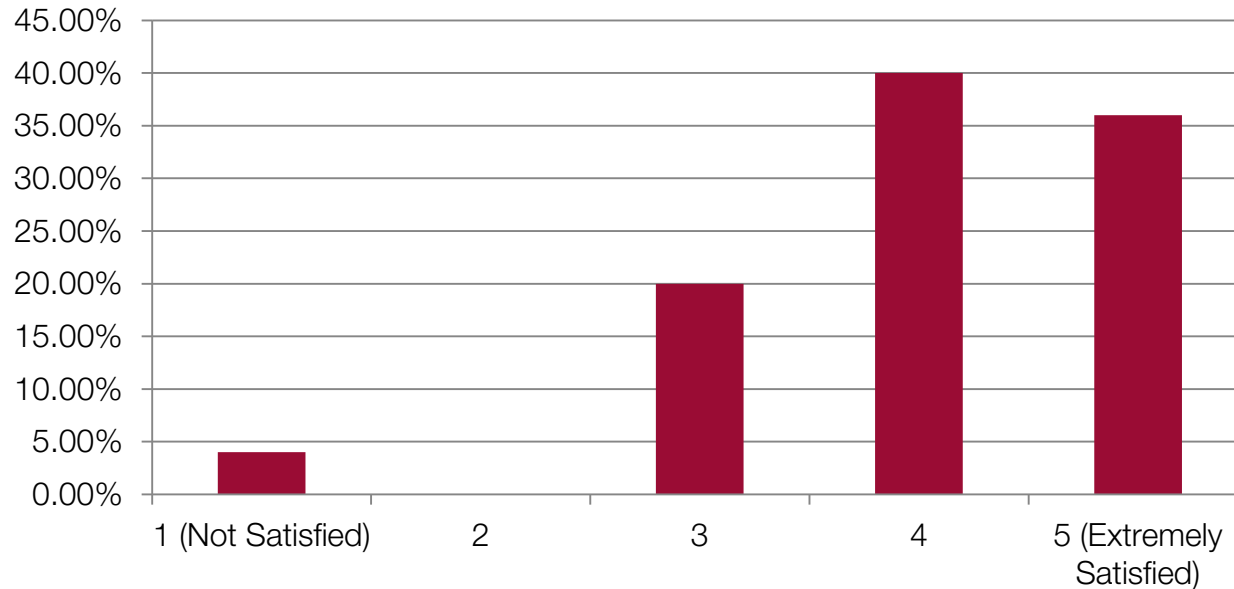
Satisfaction with Restroom Availability



13. How satisfied were you with the courtesy and friendliness by locals?

<i>n</i> =	25
1 (Not Satisfied)	4.0%
2	0.0%
3	20.0%
4	40.0%
5 (Extremely Satisfied)	36.0%

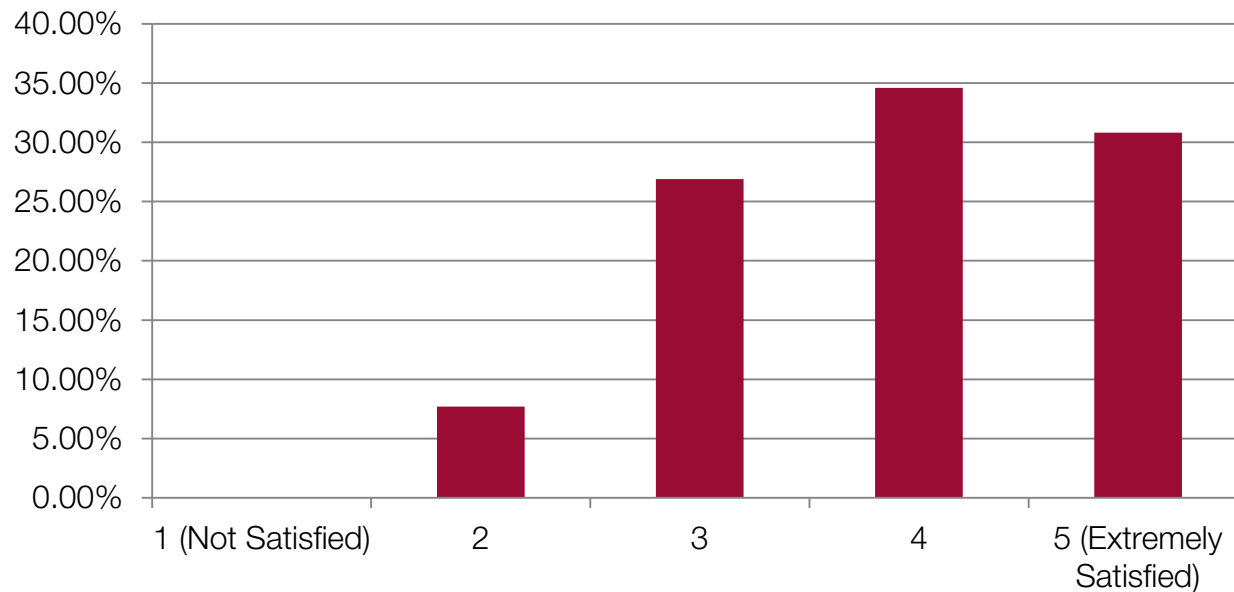
Satisfaction with Local Manners



14. How satisfied were you with the knowledgeability and helpfulness by locals?

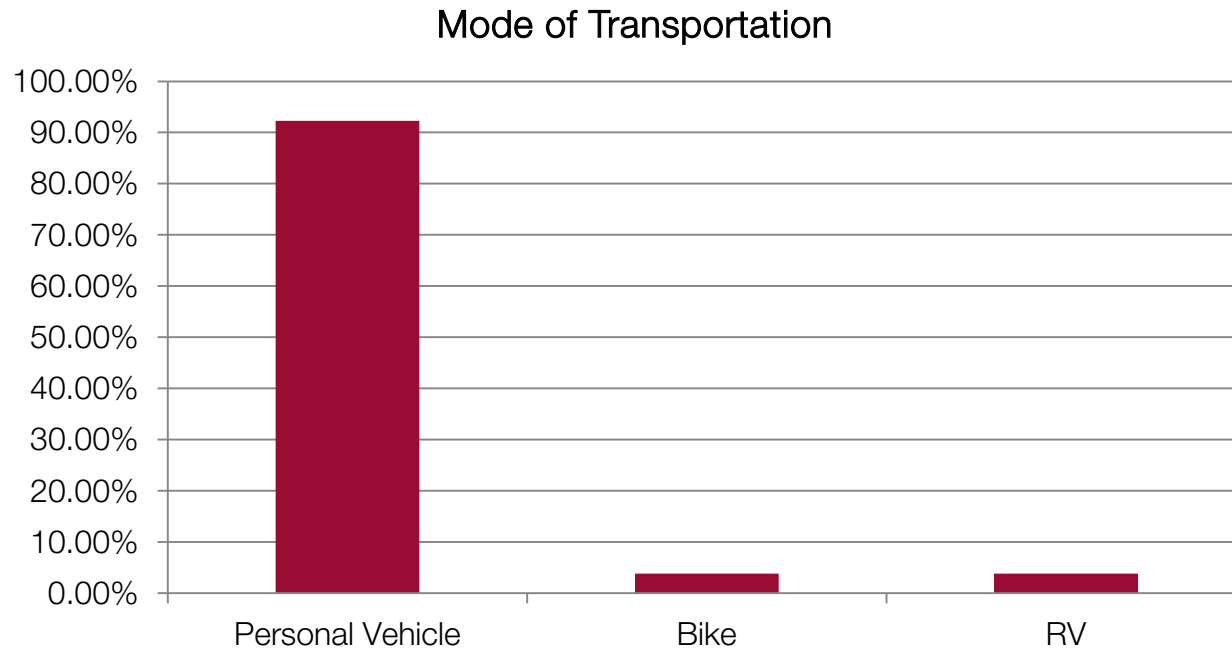
<i>n</i> =	26
1 (Not Satisfied)	0.0%
2	7.7%
3	26.9%
4	34.6%
5 (Extremely Satisfied)	30.8%

Satisfaction with Local Knowledge



15. How did you travel the Byway?

<i>n</i> =	26
Personal Vehicle	92.3%
Bike	3.8%
RV	3.8%



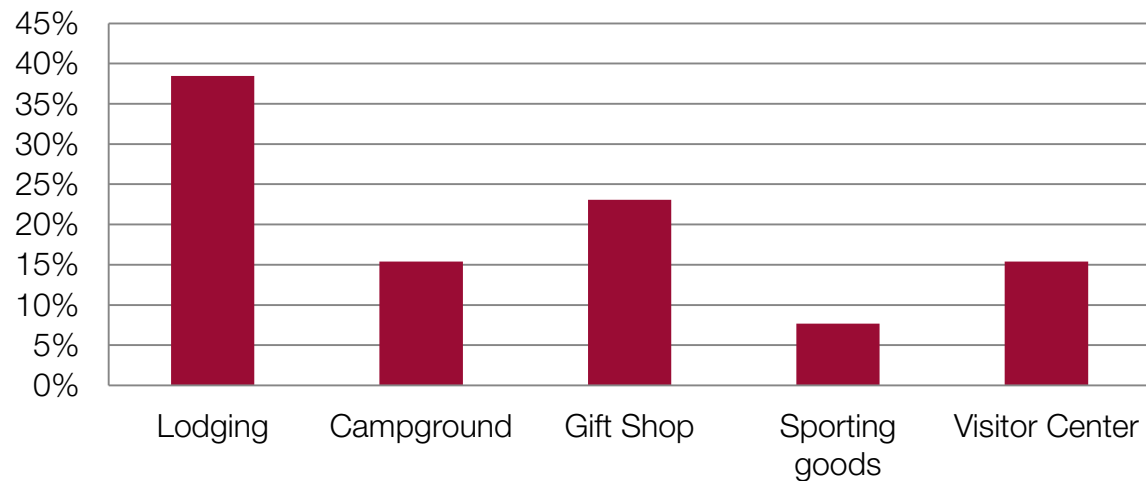
Scenic Byway Online Survey Comments on “What to Improve” Question:

- Better restaurant choices in Boulder, better campgrounds in Boulder.
- Better parking & hiking trailhead for lower Calf Creek.
- Ban grazing on Boulder Mountain. Cows on the road are both dangerous and unsightly. Otherwise keep it the way it is. It is special exactly because it is mostly undeveloped and doesn't have too many businesses or signs.
- Make the rest, turnout and interpretive stops more noticeable, they are difficult to see/spot... more eye-catching. Don't hide them into the roadside environment... bigger & bolder.
- Improve signage of good photo spots.
- I wish there was more signage, which I know might ruin the tranquility and beautiful scenery, but it was hard to know about upcoming sites, attractions, etc.
- On a road trip on Route 89 from Phoenix to the Canadian Border, Scenic Byway 12 and Capitol Reef National Park was one of the highlights of my trip and a definite return location. Better signage to Cathedral Valley / The Waterpocket Fold would have been welcome.
- Nothing in particular. It's a beautiful area, thank you for sharing it with the rest of us. It would be nice to have more quality restaurants - not fancy, just good fresh ingredients. I know - getting fresh veggies in SE Utah is a challenge.
- Don't ruin it by commercializing it. Keep it as primitive as possible-- preserve its beauty!
- The addition of another rest stop or two would be nice. My best recollection is one in Red Canyon and one on Boulder Mtn. BLM in Escalante, too.
- Keep up with road surfaces. Riding a motorcycle on Byway 12 can be challenging when the tar snakes are wet or warm and become very slippery. In Arizona we don't have the same problems with road surface.
- Improve the availability of QUALITY lodging and restaurants. Most lodging is overpriced and lacks value considering the condition of the facilities. Restaurants are overpriced for quality of food and service.
- Keep things low key. Minimize highway improvements to just the areas that need it most. Don't go blasting a super highway through there.
- More restrooms.
- Have a bike lane.
- Not much - the scenery is worth the drive.

1. What type of business do you operate?

<i>n</i> =	13
Lodging	38%
Campground	15%
Gift Shop	23%
Sporting goods	8%
Visitor Center	15%

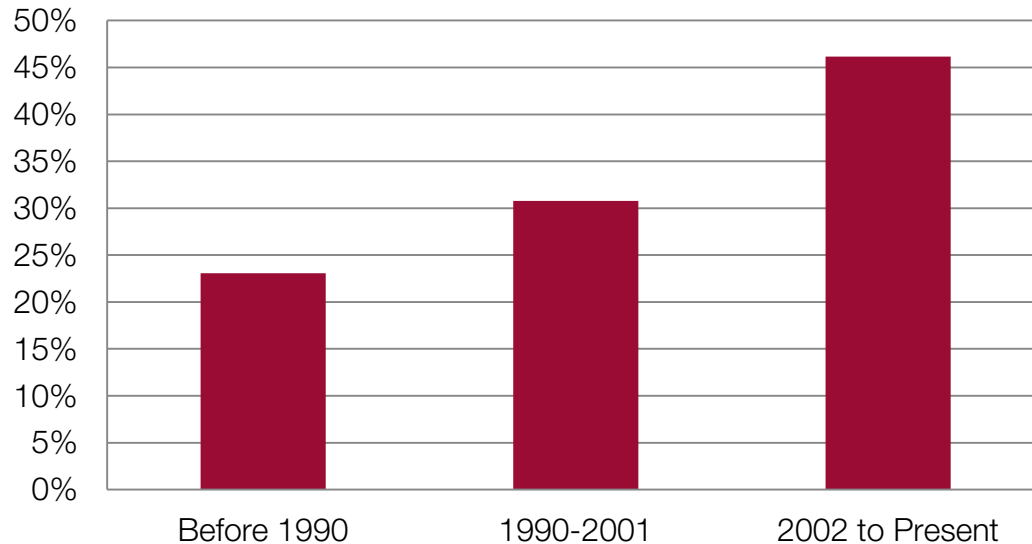
Business Type



2. In what year did your business first open?

<i>n</i> =	13
Before 1990	23%
1990-2001	31%
2002 to Present	46%

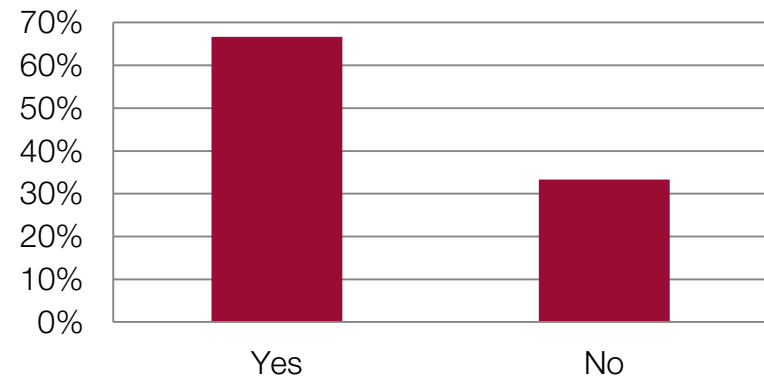
Business Open Year



2a. If before 2002 and the designation of the Scenic Byway, do you feel there were any significant impacts to your business from the designation of the Scenic Byway?

<i>n</i> =	9
Yes	67%
No	33%

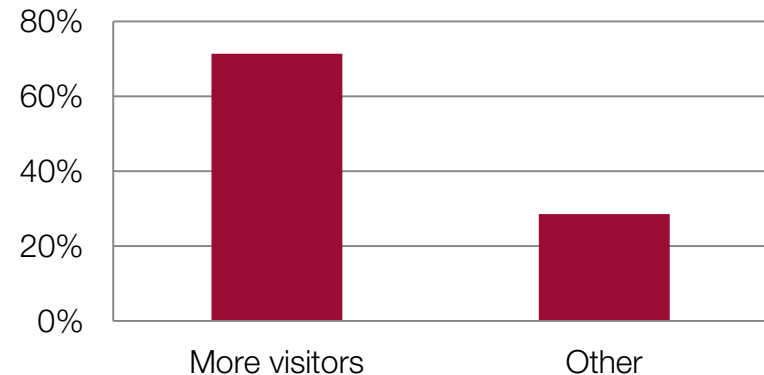
Business Impact



2b. If yes, please describe those impacts

More visitors	71%
Other	29%

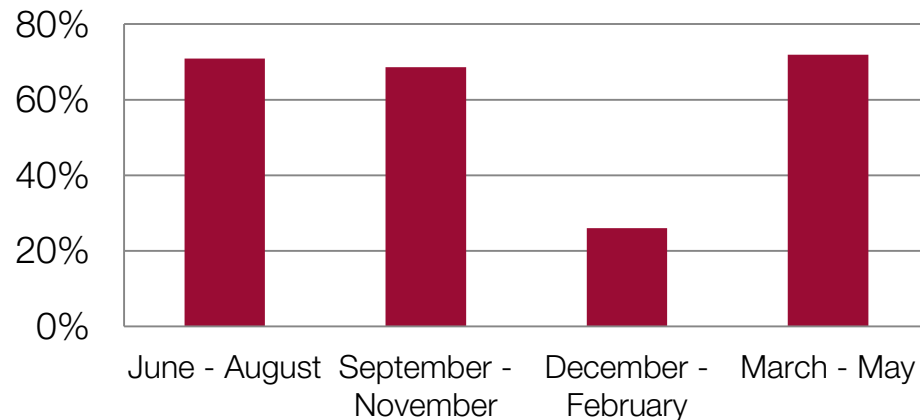
Business Impact Description



3. Approximately what percentage of your retail sales in each quarter comes from tourism?

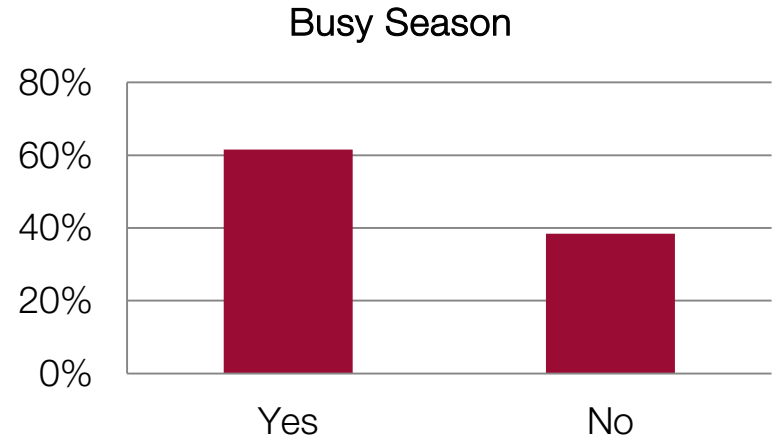
June, July and August	71%
September, October and November	69%
December, January and February	26%
March, April and May	72%

Percentage of Retail Sales from Tourism



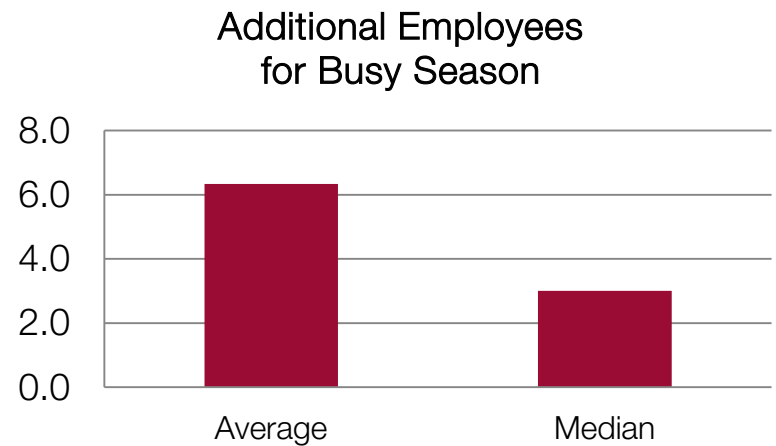
4a. Is there a busy season during which your business hires extra employees?

<i>n</i> =	13
Yes	62%
No	38%



4b. If yes, how many extra employees did you hire?

Average	6.3
Median	3.0

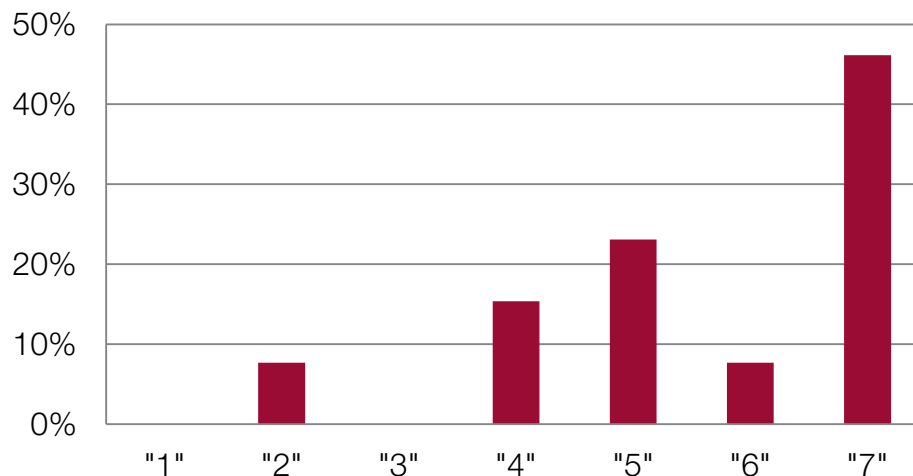


5. For the following statements, please circle the number that best indicates your response, with 1 meaning "Strongly Disagree" and 7 meaning "Strongly Agree"

a. Over the past year the Scenic Byway has created additional sales for my business.

n=	13
Average	5.62
"1"	0%
"2"	8%
"3"	0%
"4"	15%
"5"	23%
"6"	8%
"7"	46%

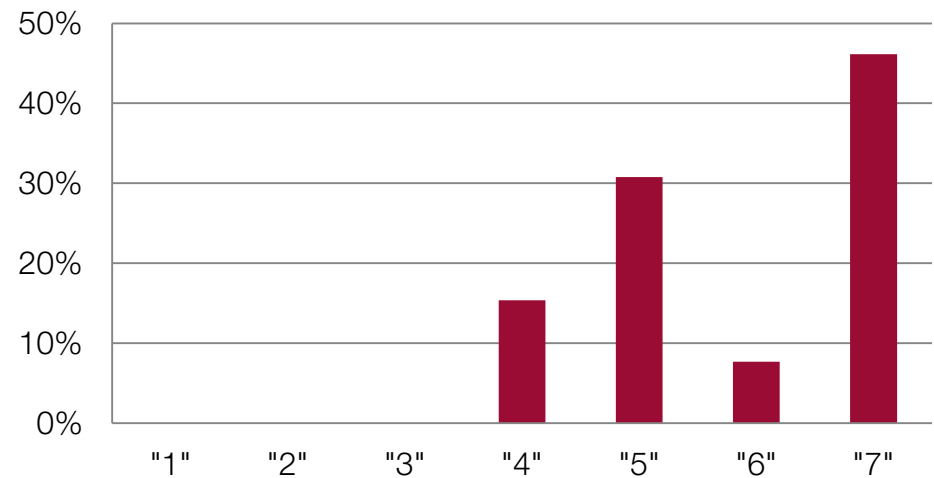
Additional Sales - Past Year



b. Over the next five years, the Scenic Byway will have a significant impact on sales for my business.

n=	13
Average	5.85
"1"	0%
"2"	0%
"3"	0%
"4"	15%
"5"	31%
"6"	8%
"7"	46%

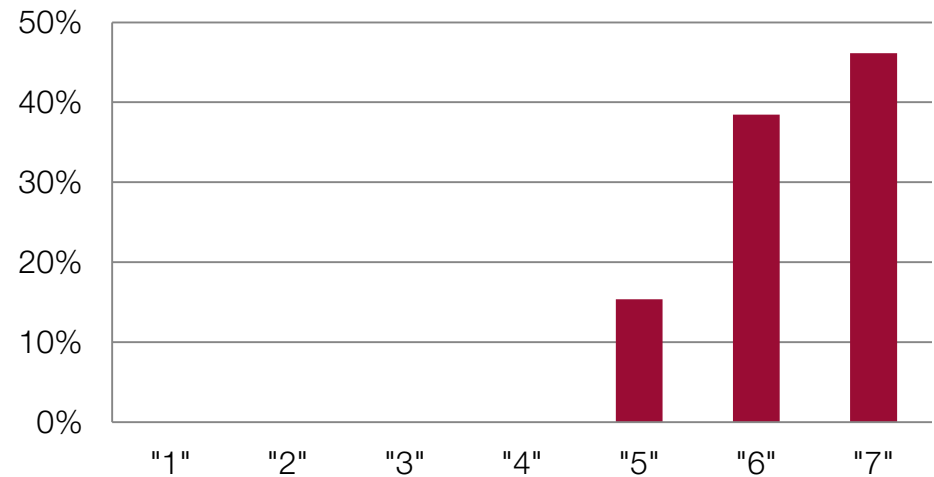
Sales Impact - Next Five Years



c. Over the next five years, the Scenic Byway will be important to the economic health of the community.

<i>n</i> =	13
Average	6.31
"1"	0%
"2"	0%
"3"	0%
"4"	0%
"5"	15%
"6"	38%
"7"	46%

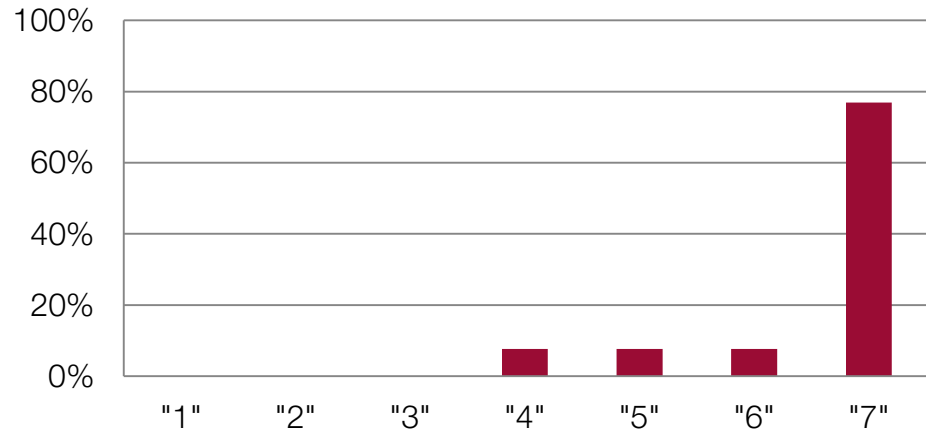
Importance to Community Economy



d. My business would benefit from additional promotion of the Scenic Byway.

<i>n</i> =	13
Average	6.54
"1"	0%
"2"	0%
"3"	0%
"4"	8%
"5"	8%
"6"	8%
"7"	77%

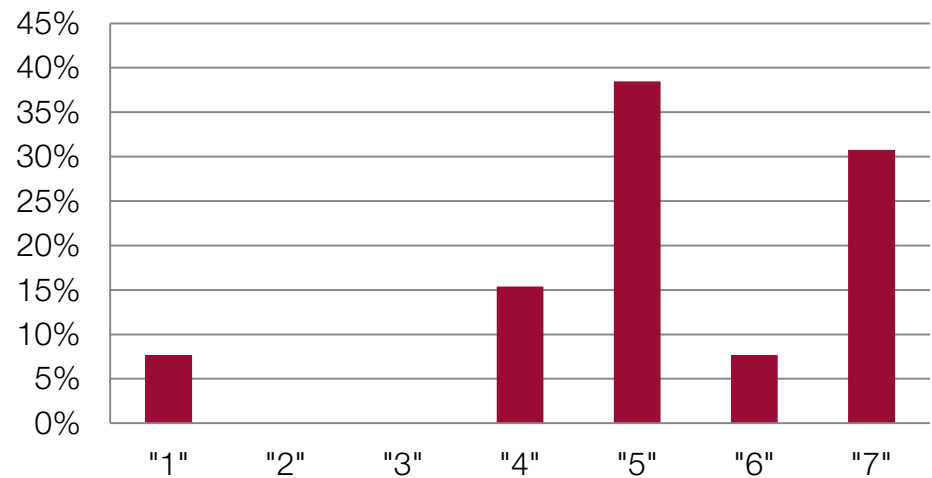
Business Would Benefit from Additional Promotion of Scenic Byway



e. The Scenic Byway plays an important role in influencing people to travel through this area.

<i>n</i> =	13
Average	5.23
"1"	8%
"2"	0%
"3"	0%
"4"	15%
"5"	38%
"6"	8%
"7"	31%

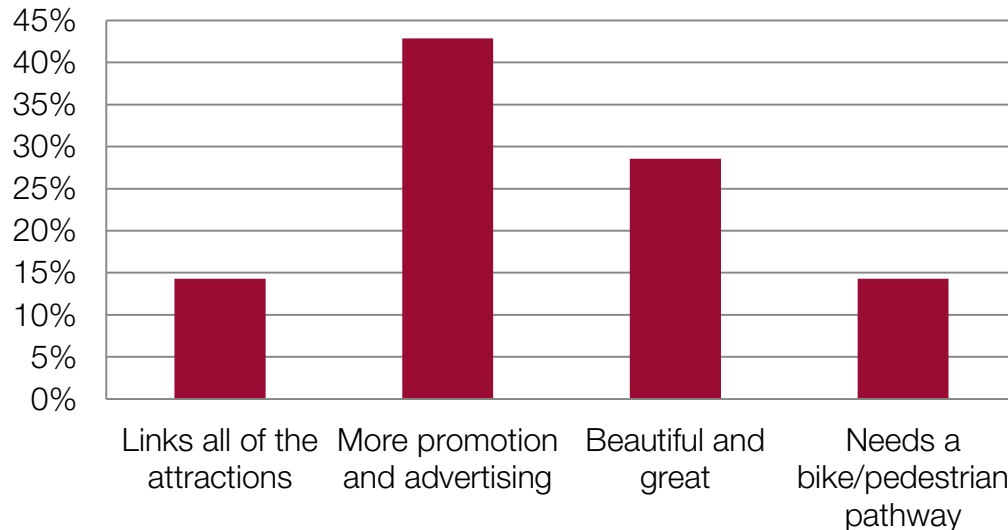
Role of Scenic Byway in Influencing Visitors



6. Is there anything else about the Scenic Byway that you would like to tell us?

Links all of the attractions	14%
More promotion and advertising	43%
Beautiful and great	29%
Needs a bike/pedestrian pathway	14%

Other Comments



1. Average Annual Daily Trips (AADT) Calculation

Change in annual traffic (AADTs) since designation	167,618
% Non-Resident Trips	80%
Non-Resident Trips	134,095

	% Vacation	% Visit Family or Friends	% Business	Other	TOTAL
Purpose of Trip	87.7%	5.2%	2.9%	4.2%	100%
	Vacation Trips	Personal Trips	Business Trips	Other	TOTAL
Non-Resident Trips by Purpose	117,601	6,973	3,889	5,632	134,095

2. Cost Allocation

Scenic Byway as a Factor:	% Survey Response	Allocation
Extremely Important (score of 5)	47.9%	80%
Very Important (score of 4)	25.7%	50%
Scenic Byway Influenced AADTs	60,176	
Average Length of Trip	4.02	
Scenic Byway Trips	14,969	
Total Trip Cost - All Persons in Party	\$853.56	
Annual Impacts in Spending due to Byway	\$12,777,155	

	Total Taxable Sales 2013	% of Total
Wayne County	\$39,365,960	26.16%
Garfield County	\$111,093,691	73.84%
TOTAL	\$150,459,651	

Scenic Byway impacts of \$12,777,155 in 2013 equal 8.5 percent of total sales in Garfield and Wayne Counties.

Fiscal Impacts Spending Analysis	Per Party	Total Spending
Gas and Fuel	\$121.33	\$1,816,145
Restaurants and Fast Food	\$165.55	\$2,478,088
Groceries	\$44.49	\$666,004
Gifts, Souvenirs	\$110.99	\$1,661,383
Lodging	\$332.18	\$4,972,422
Admissions	\$13.43	\$200,981
Auto repair	\$8.45	\$126,543
Other	\$57.15	\$855,560
TOTAL	\$853.56	\$12,777,126

Fiscal Impacts Spending Analysis

	Local Option Sales Tax - POS (50%)	County Option Sales Tax - POS	Transient Room Tax	Restaurant Tax	Resort Tax	Rural Hospital Tax	Total Fiscal Impacts
	<i>1.00%</i>	<i>0.25%</i>	<i>4.25%</i>	<i>1.00%</i>	<i>1.00%</i>	<i>1.00%</i>	
Gas and Fuel	\$9,081	\$2,270			\$10,218	\$13,410	\$34,979
Restaurants and Fast Food	\$12,390	\$3,098		\$24,781	\$13,943	\$18,297	\$72,509
Groceries	\$3,330	\$833			\$3,747	\$4,918	\$12,827
Gifts, Souvenirs	\$8,307	\$2,077			\$9,347	\$12,267	\$31,998
Lodging	\$24,862	\$6,216	\$211,328		\$27,976	\$36,714	\$307,096
Admissions	\$1,005	\$251			\$1,131	\$1,484	\$3,871
Auto repair	\$633	\$158			\$712	\$934	\$2,437
Other	\$4,278	\$1,069			\$4,814	\$6,317	\$16,478
TOTAL	\$63,886	\$15,971	\$211,328	\$24,781	\$71,888	\$94,341	\$482,195

Resort Community Tax

Boulder	1.0%
Bryce Canyon	1.1%
Escalante	1.1%
Panguitch	1.0%
Tropic	1.0%

Rural Hospital Tax

Wayne County does not have the Rural Hospital Tax; Garfield County does.

National Scenic Byways Center Case Studies Findings:

- 3.4% - 20% increase in annual traffic
- Jobs per \$1 million in visitor spending: 19-33 jobs
- \$74,000 - \$1.45 billion in total business sales resulting from scenic byway
- \$0.045 to \$0.08 in state and local tax receipts per \$1 in visitor spending

Applied to Scenic Byway 12:

- 243 – 422 jobs created (Full-Time Equivalents – FTEs)
- In comparison - \$0.038 in local tax receipts per \$1 of visitor spending
- In comparison - \$0.047 in state tax receipts per \$1 of visitor spending

Old Canada Road National Scenic Byway, 2007, Maine

- 25% of household incomes above \$100,000
- 68% have some college education
- 60% = male
- Average age = 49 years
- Interpretive centers – greatest interest was in Native American over topics like geology, immigration and history
- High interest for guided hikes and tours, but interest was directly related to price

Minnesota Scenic Byways, Paul Bunyan and Lake Country Scenic Byway Studies, 2010

Visitors prefer:

- low-cost and roadway accessible activities (such as pull-offs)
- small towns and cultural attractions
- commercial-free corridors

Paul Bunyan

- 23,800 parties visited specifically for the byway, adding \$21.2 million in economic output, including 331 jobs

Lake Country

- 51,000 parties visited specifically for the byway, adding \$31.7 million in economic output, including 512 jobs

Adirondack North Country Scenic Byways Market Trend Assessment, 2009, New York

- 70% with incomes over \$50,000
- Almost half were in parties of two people
- 76% of respondents had no children in their group
- Most important activities included low-cost, easy-access opportunities such as hiking and water access sites

Colorado Scenic Byways, October 2013

- Tourism on two byway routes reported a ten percent increase in sales due to byway designation
- Impacts were most pronounced in rural areas
- Have been able to get significant grants for signage and safety improvements.

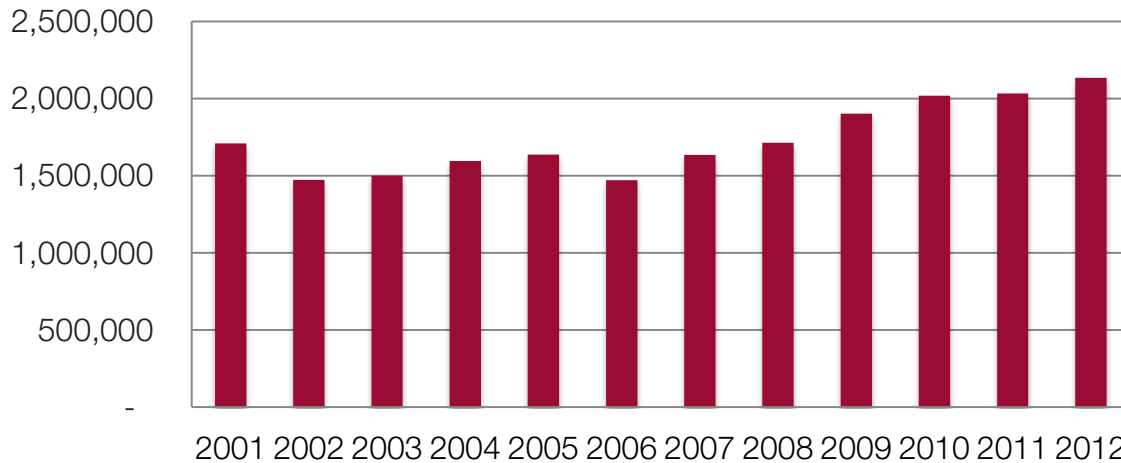
Beartooth Highway (“All-American Road”), 2013 Economic Impacts Report – Montana and Wyoming

- 32% of summer travelers visit the byway as their only destination
- 54% of visitors saw the byway as a primary destination
- Yellowstone connection is a factor for this byway
- Economic stability of several cities along the byway was directly tied to the byway

National Scenic Byways Case Studies

- Volcanic Legacy Scenic Byway
 - \$163.6 million in business sales, more than 1,000 jobs, and an increase of \$24.6 million in labor earnings
- Blue Ridge Parkway
 - \$1.5 billion in business sales, more than 9,300 jobs, and an increase of \$251.7 million in labor earnings
- Cherokee Hills Byway
 - \$85.3 million in business sales, about 924 jobs, and an increase of \$30.2 million in labor earnings
- Journey Through Hallowed Ground National Scenic Byway
 - \$1.06 billion in business sales, more than 6,500 jobs, and an increase of \$165.1 million in labor earnings
- Woodward Avenue Automotive Heritage Trail
 - \$234,000 in business sales, about 1.2 jobs, and an increase of \$53,000 million in labor earnings

Total Annual Visitation
Scenic Byway 12
2001 - 2012

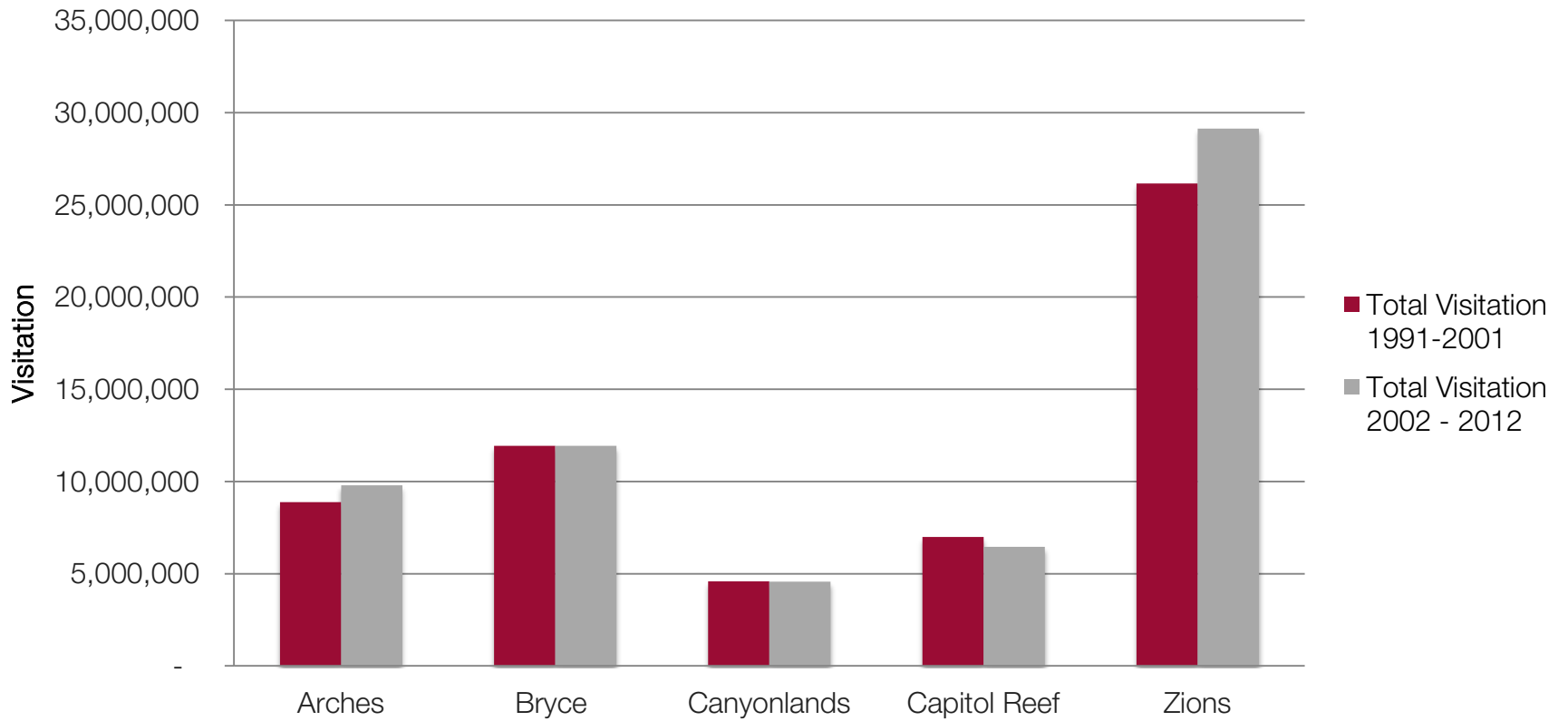


Includes:

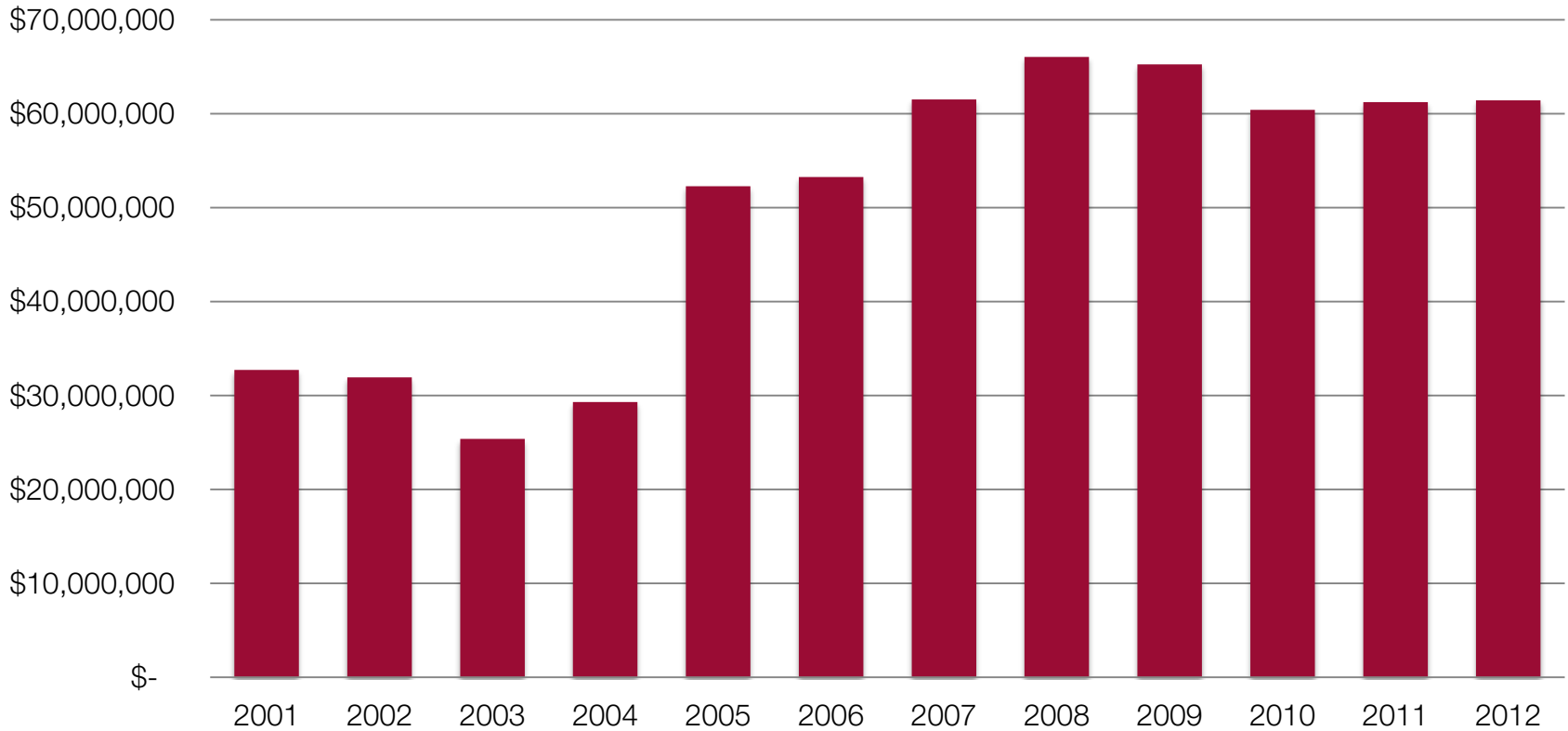
- Bryce Canyon Visitor Center
- Escalante Interagency Visitor Center
- Anasazi State Park Museum
- Capitol Reef Visitor Center
- Red Canyon Visitor Center (after 2005)

Visitation in 2012 was 25% higher in 2012 than in 2001

Total Visitation
Utah's "Mighty Five" National Parks
1991 - 2001 Compared to 2002 - 2012

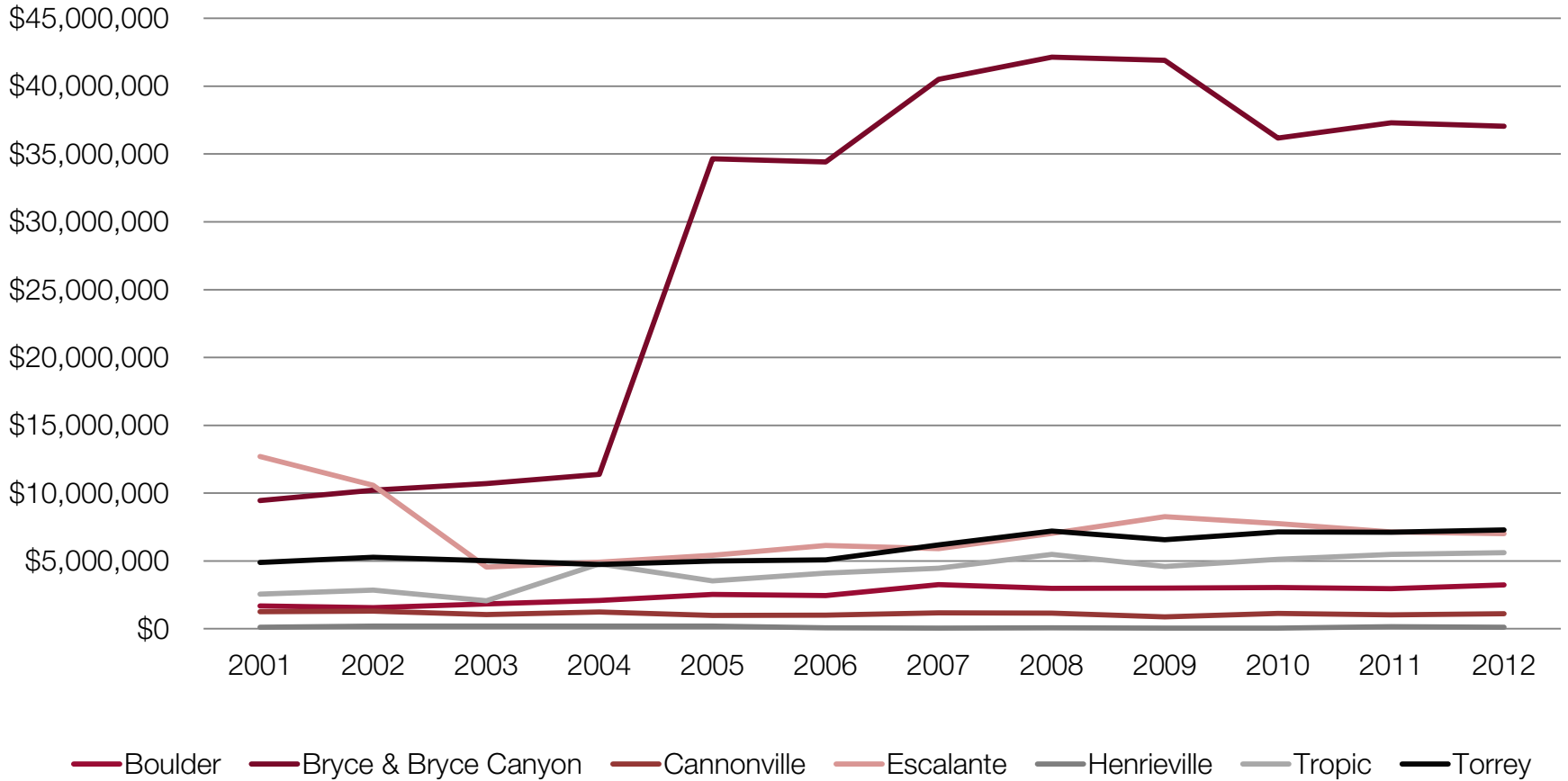


Total Taxable Sales
Scenic Byway 12

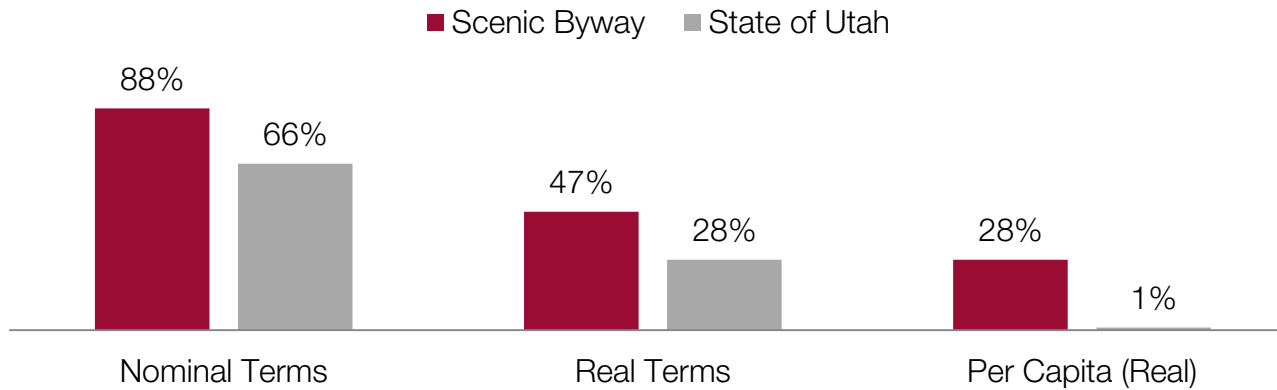


Ruby's Inn had a major expansion in 2005.

Annual Taxable Sales Scenic Byway 12

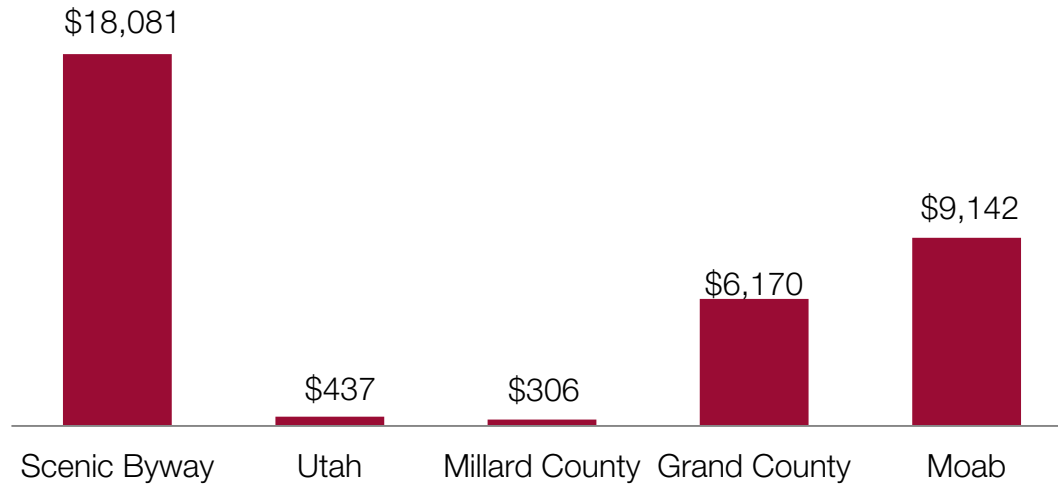


Percent Change in Taxable Sales



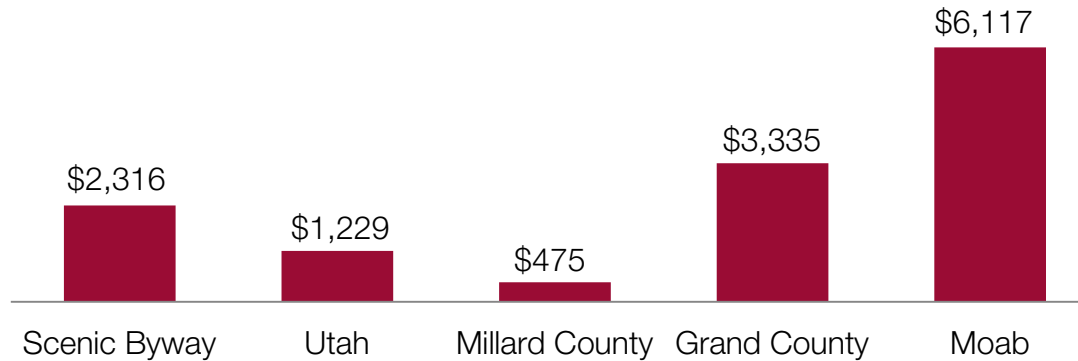
Taxable Sales 2001 – 2012	Percent Change Taxable Sales (Nominal Terms)	Percent Increase Taxable Sales (Real Terms)	Percent Change Per Capita Sales (Real Terms)
Scenic Byway	16%	5%	1%
State of Utah	19%	8%	-1%
Boulder	91%	46%	21%
Bryce National Park and Bryce Canyon City	292%	199%	3%
Cannonville	-11%	-32%	-38%
Escalante**	-45%	-58%	-56%
Henrieville	-44%	-57%	-69%
Tropic	120%	68%	63%
Torrey	49%	14%	8%

Accommodations Spending
Per Capita 2012



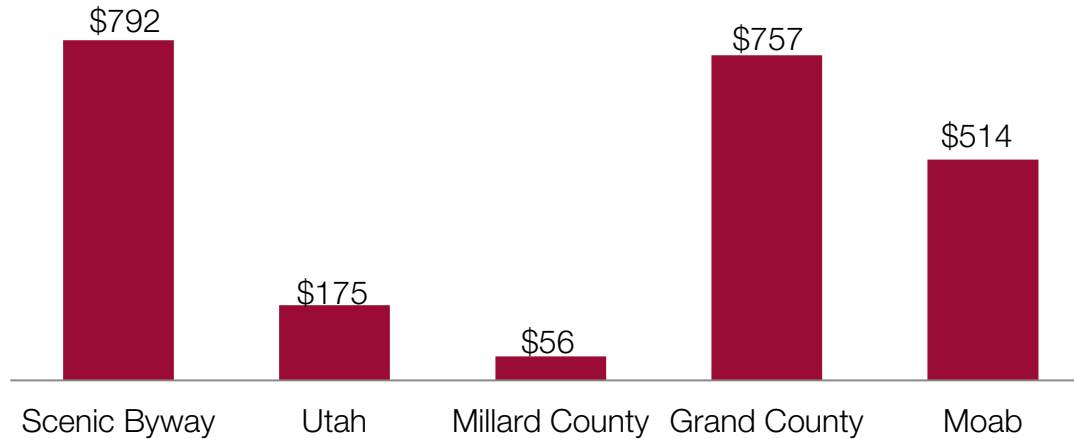
Accommodations 2008 – 2012	Percent Change Taxable Sales (Nominal Terms)	Percent Increase Taxable Sales (Real Terms)	Percent Change Per Capita Sales (Real Terms)
Scenic Byway	16%	5%	1%
State of Utah	19%	8%	-1%
Millard County	31%	18%	15%
Grand County	31%	18%	12%
Moab City	44%	31%	22%

Restaurant Spending
Per Capita 2012



Restaurants 2008 – 2012	Percent Change Taxable Sales (Nominal Terms)	Percent Increase Taxable Sales (Real Terms)	Percent Change Per Capita Sales (Real Terms)
Scenic Byway	39%	26%	20%
State of Utah	13%	2%	-6%
Millard County	1%	-9%	-10%
Morgan	25%	13%	-10%
Grand County	17%	6%	2%
Moab City	24%	24%	19%

Arts, Entertainment and Recreation Spending
Per Capita 2012



Arts, Entertainment and Recreation 2008 – 2012	Percent Change Taxable Sales (Nominal Terms)	Percent Increase Taxable Sales (Real Terms)	Percent Change Per Capita Sales (Real Terms)
Scenic Byway	70%	54%	47%
State of Utah	-1%	-10%	-17%
Millard County	15%	4%	4%
Grand County	9%	-1%	-5%
Moab City	10%	0%	-2%

Questions?