



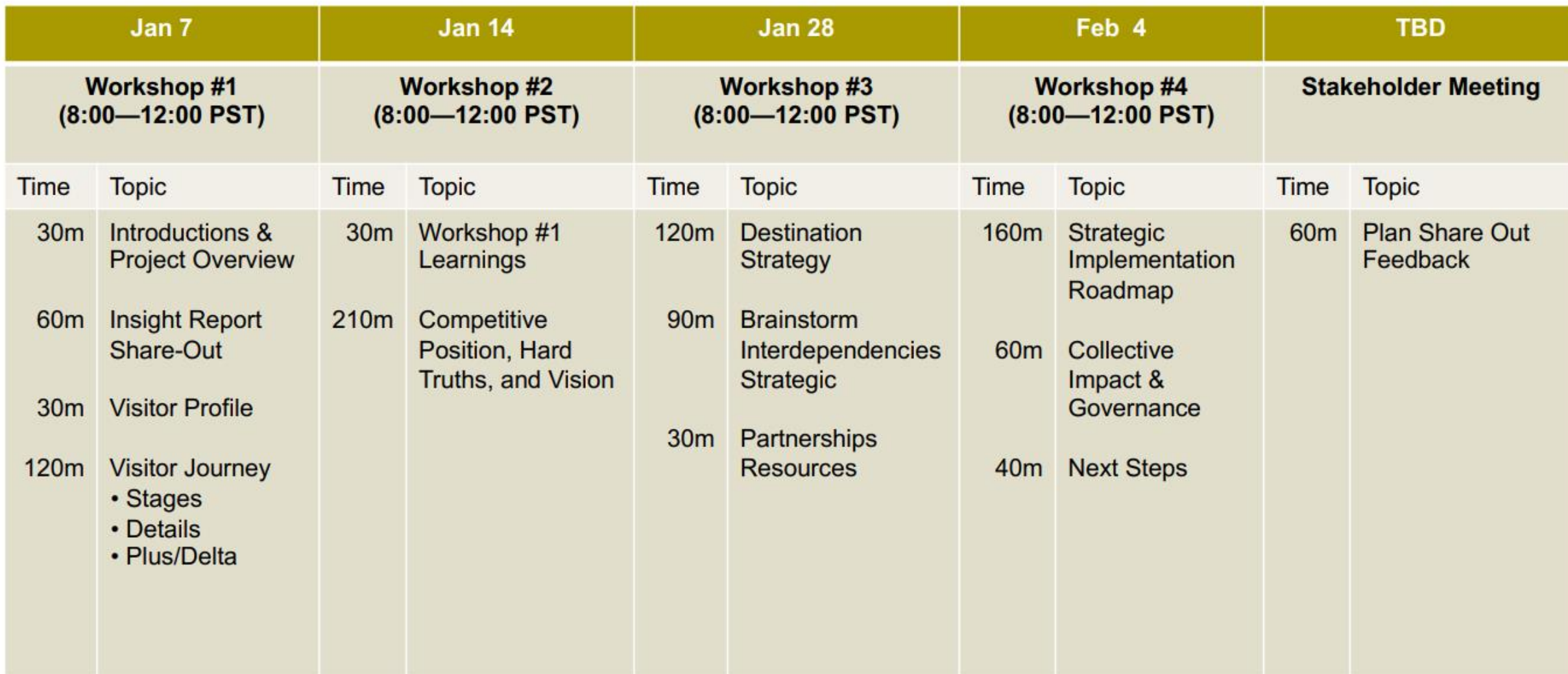
Lincoln County – Destination Development Insights

Lincoln County Authority of Tourism

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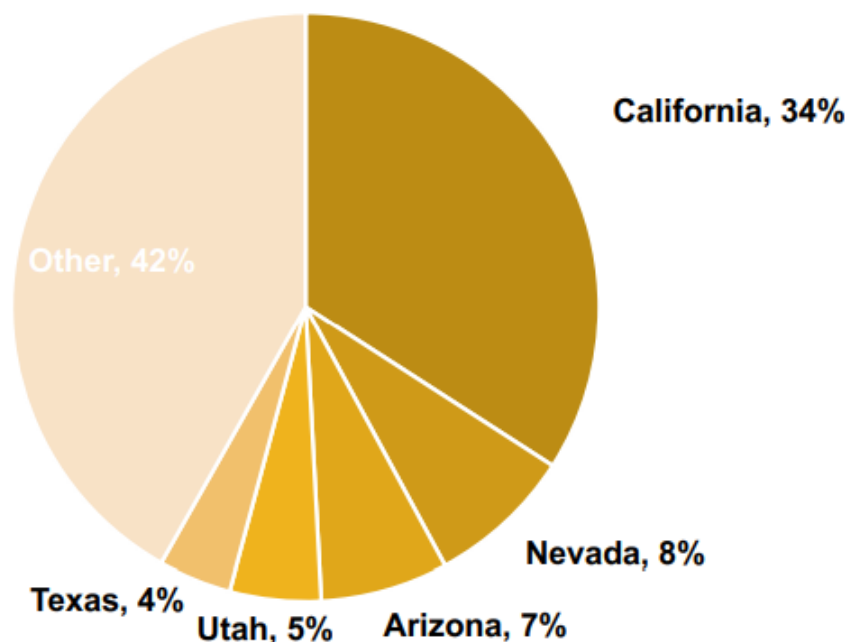


Project Overview and Session Agendas



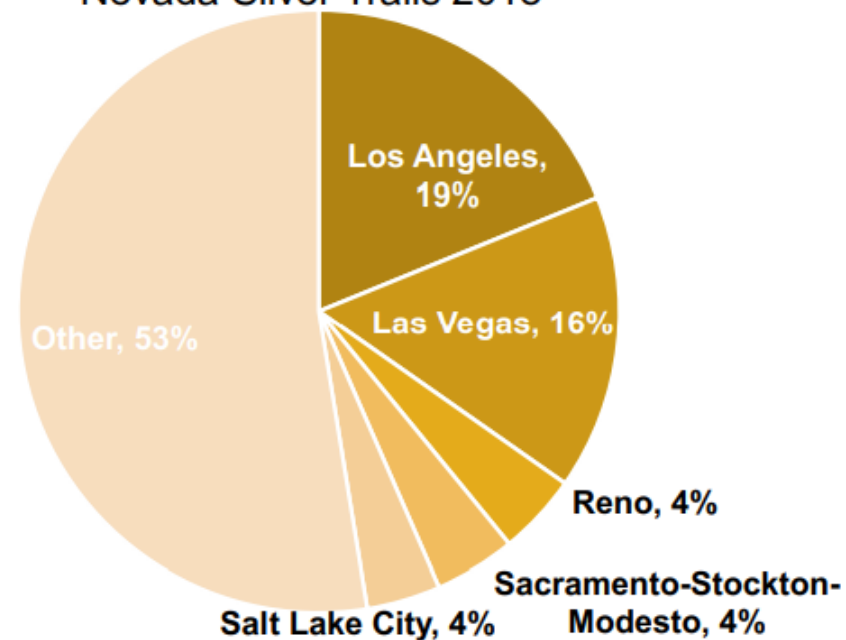
Nevada and Silver Trails Feeder Markets

Percentage of Visitors by State, Nevada 2018



Source: Travel Nevada FY19 Annual Report

Percentage of Visitors by Metropolitan Area, Nevada Silver Trails 2018



Source: Nevada Silver Trails Visitor Facts 2018-214

Visitor Planning and Booking Characteristics

- Rely on offline, experience, and friends and relatives for planning
- 28% decide to travel within one week
- 21% decide to travel within 1-3 weeks
- 31% decide to travel within 1-3 months
- Top reason for a return trip is to visit:
 - Las Vegas/Casino-Resorts (22%)
 - Amusement/Theme Parks (7%)
 - Visit Friends/Relatives (6%)
- Stay Location:
 - Casino Hotel/Motel (43%)
 - Friends' or Relatives' Residence (23%)
 - Non-Casino Hotel/Motel (14%)
 - Developed Campgrounds/RV Parks (7%)
 - Condo-Time Share (7%)

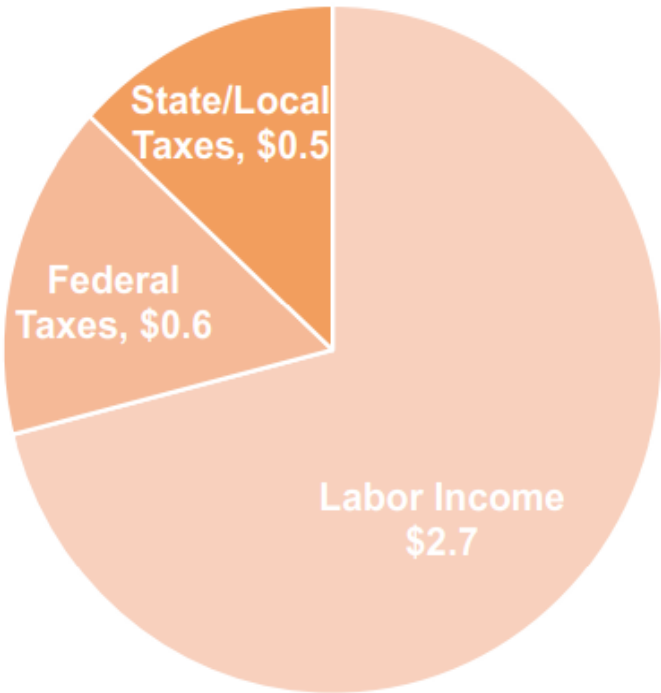
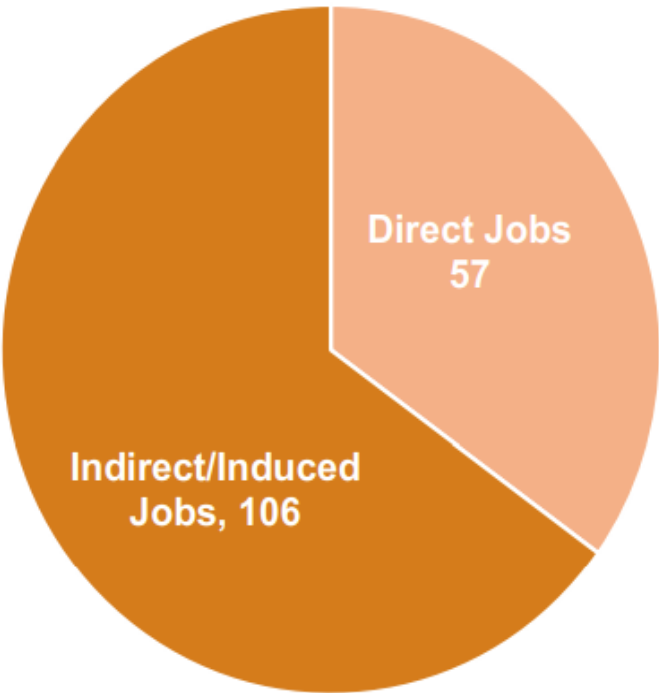
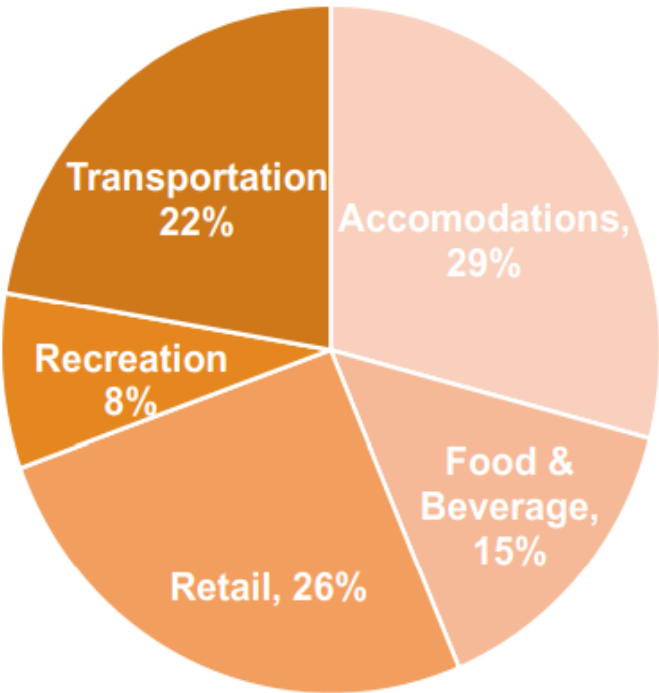
Nevada Visitor Demographics



- Middle Aged (avg. age 47)
- Caucasian (73%)
- Middle Class
 - \$79k median income
- Educated
 - 64% college

Tourism Impact on Lincoln County

Visitor Spending by Type



Visitor Spending	Jobs Supported	Tax Revenue
\$5.9 Million	163	\$3.8 Million (\$2.1m direct and \$1.7m indirect)

Visitor Profiles: Retired Roadtrip Couple



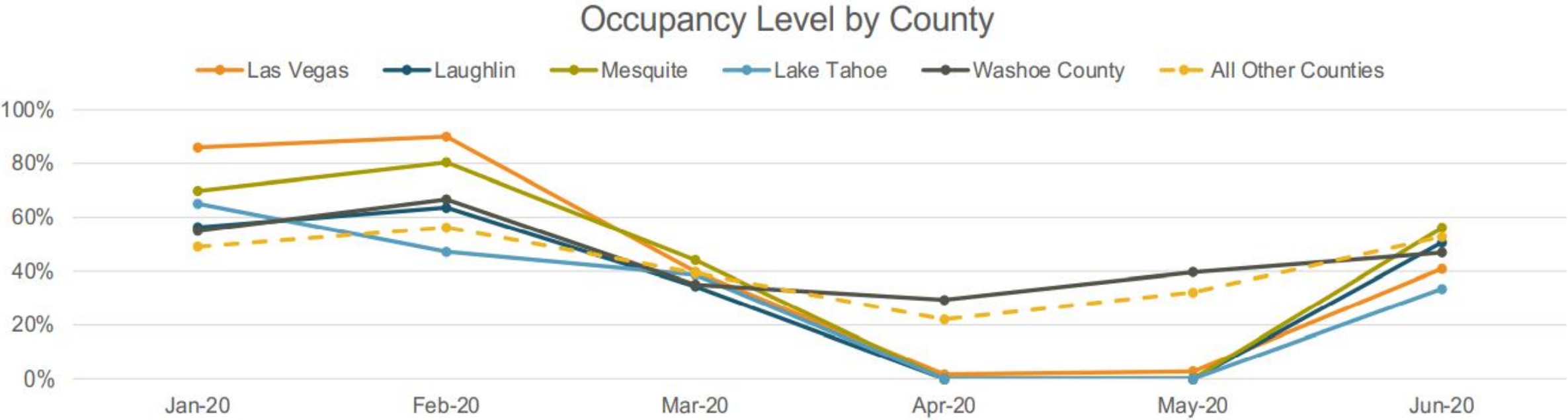
Age	+55	
Family Status	Empty Nesters, Retired	
Income	\$50-\$75; Median Income	
Days Spent	2-3 days; Long-weekenders/Day-trips	
What is the purpose of their visit?	Passing through, rest-stop	
What are they seeking? What do they want to experience?	Scenic drive	Train depot and historical sight-seeing
	Basic Services; food, supplies, wifi, etc.	State park and natural assets
	Convenient	Off the beaten path
What does Lincoln County offer them?	Cathedral Gorge	Kershaw Ryan
	Largest concentration of state parks in the state (25% of state parks)	State RV pads

Visitor Profiles: Outdoor Rec Traveler



Age	Middle Aged (25-55+)	
Family Status	Couples	
Income	\$75+; Median Income	
Days Spent	Weekend (2-3 Days)	
What is the purpose of their visit?	Adventure	
	Trail blazing/Off the Beaten Path	
	Adrenaline	
What are they seeking? What do they want to experience?	Uncrowded experiences	Small town rural life / live like a local
	Dirt Road Therapy	photography
	High-quality and varied trails	Freedom; less regulation and rules
What does Lincoln County offer them?	Open space and trails; trail systems, public lands	Kershaw Ryan, Silver Trails OHV,
	Dirt roads; primitive lifestyle	Barnes Canyon
	Cultural/Downtown experiences (Overland,)	Skills Park Caliente

Pandemic's Impact on Nevada Tourism



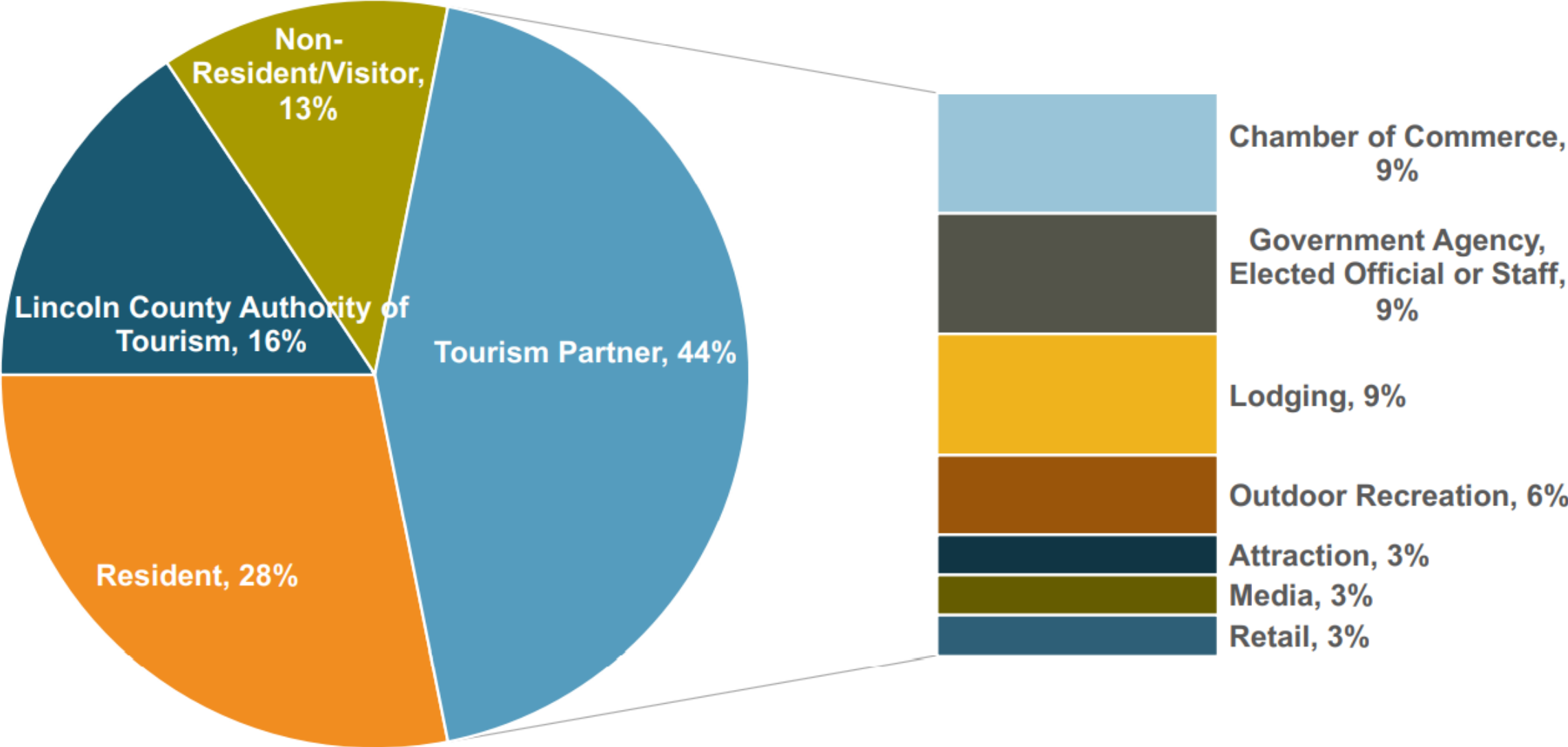
Vehicle Traffic Count	Up 13% compared to last June
Park Usage	Down 15% but up 298% since April
Convention Attendance	Down 99.9%
Gaming Revenue	Down 84% compared to last June

Nevada felt the impacts of the COVID-19 pandemic starting in March, and by April occupancy had dropped by 95% statewide. However, this impact is felt less by rural destinations, who have benefited through outdoor assets. As visitation to the state dropped by 94% in April, rural counties were taking in 52% of the share of visitors in the state compared to only 15% in March.

Survey Findings

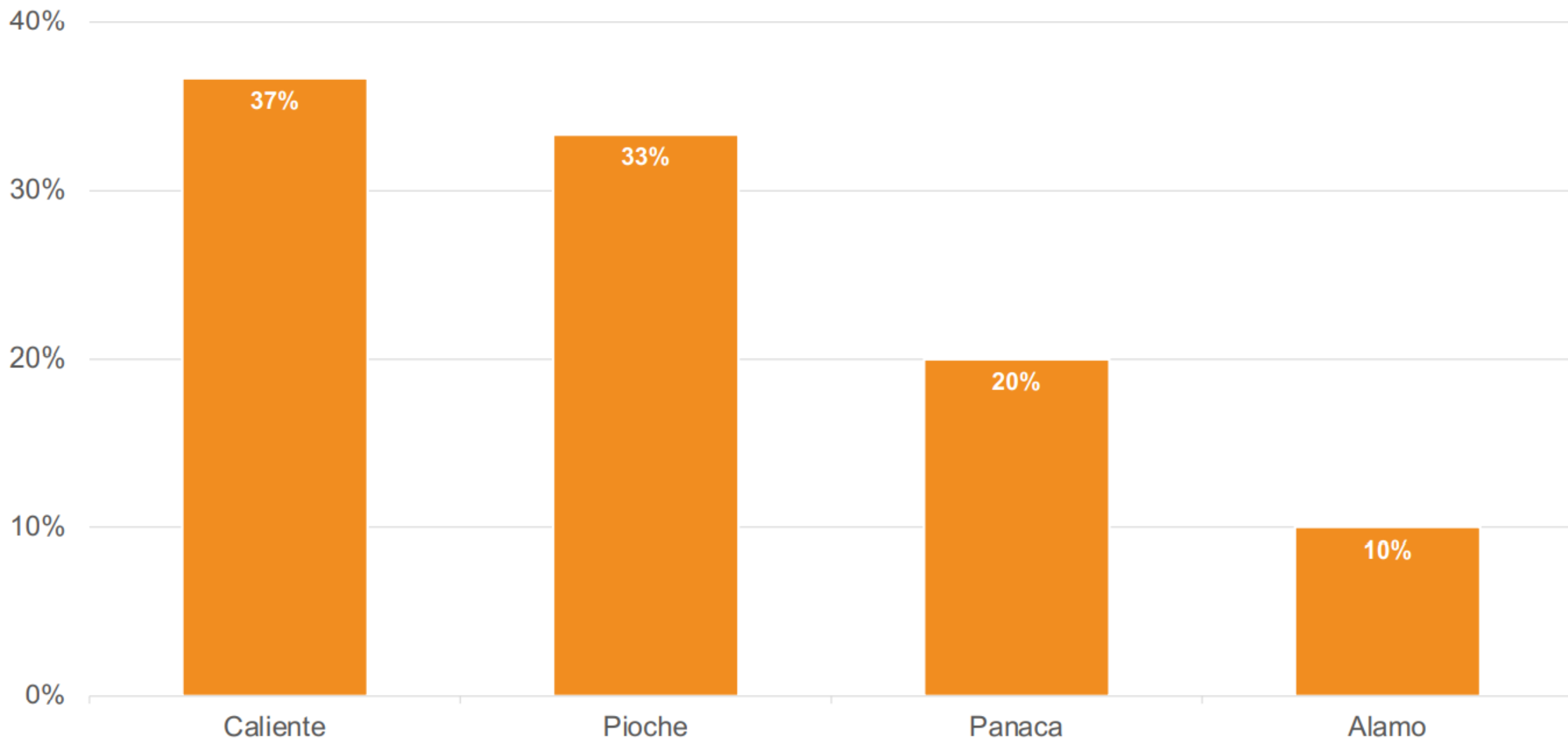
Survey Demographics: Stakeholder Type

N = 32



Survey Demographics: Location

N = 30



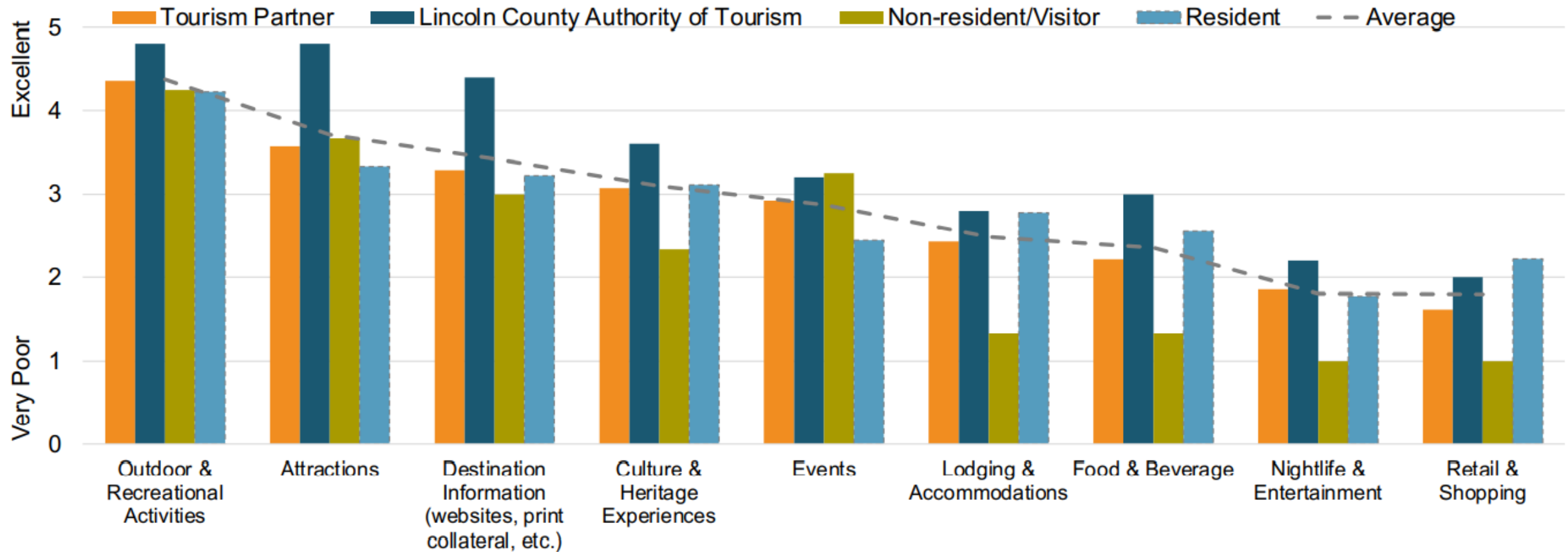
Destination Experience

N = 29



Tourism Drivers, Assets and Experiences

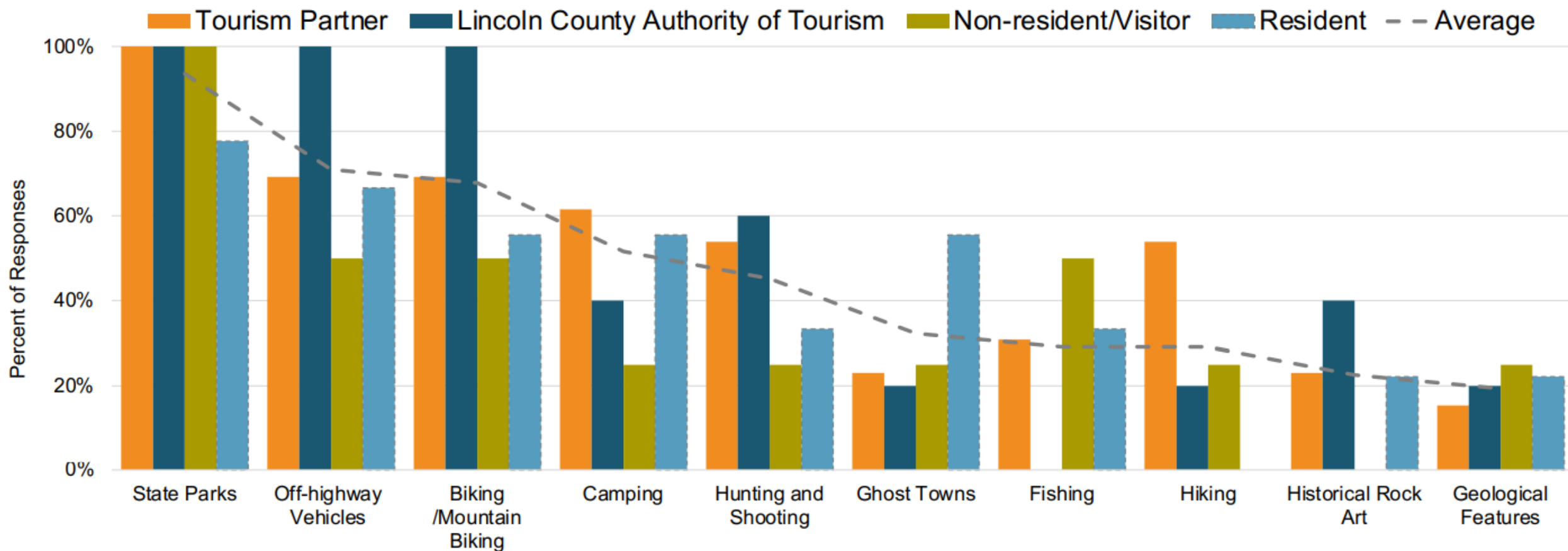
N = 31



- Outdoor & Recreational Activities are the county's primary driver of tourism.
- Revenue generating assets and experiences are limited. These assets were rated poorly by non-residents/visitors.
- Lincoln County Authority of Tourism has an overall better perception of the county's tourism drivers.
- Those from Pioche rated all drivers lower than stakeholders from other areas.

Top Ten Tourism Assets and Activities

N = 31



- Lincoln County has strong outdoor recreation assets, with 9 out of 10 top assets identified being outdoor rec assets.
- State parks are the county's main assets.
- There are differences in what is viewed as an attraction by respondent stakeholder group as well as by location.
- Those in Pioche believe ghost towns and fishing are bigger assets than biking, camping, or hunting and shooting.

Key Assets

N = 28

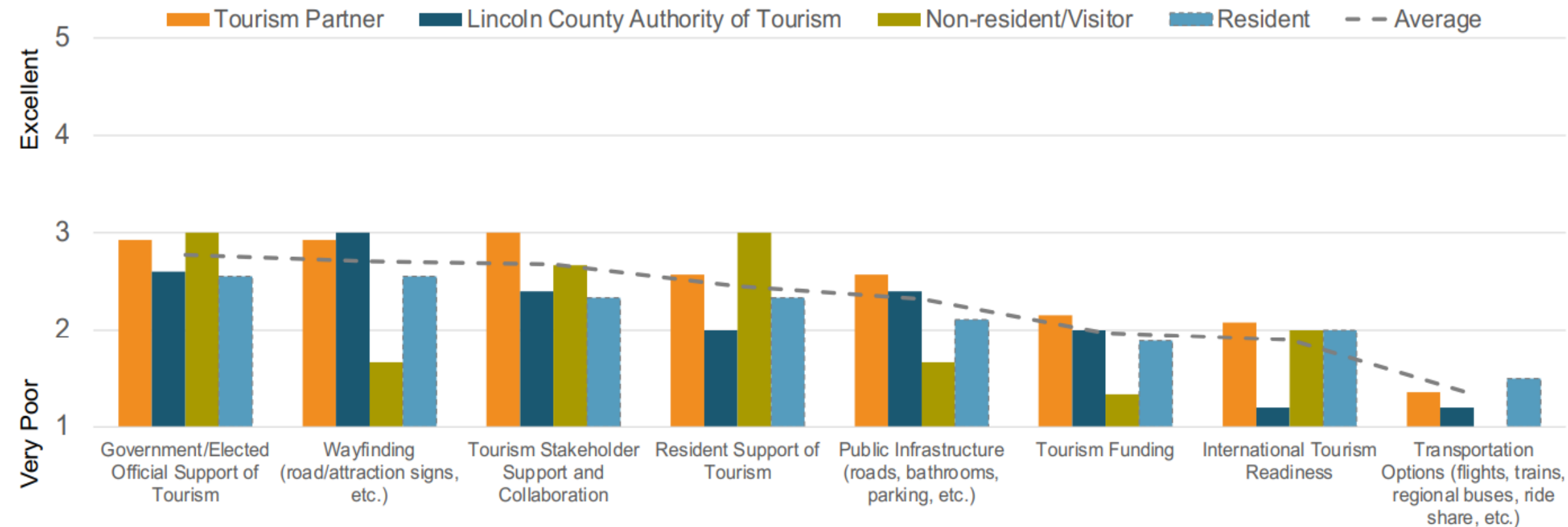


Tourism Drivers, Assets and Experiences

- “Lincoln County has tremendous potential as a tourist destination, especially for outdoor recreation.”
- “Lincoln County is so magnificent, this one county alone boasts more than 25% of the State Parks in Nevada, contains 17 Congressionally-designated Wilderness Areas, and is home to the only BLM-managed National Monument in the State.”
- “I wish Lincoln County was more diverse in tourism attractions. Seems like its always the same thing....”
- “We're working on providing more retail and shopping for our visitors... still have a ways to go.”
- “People need to know where to go, what is going on with detailed addresses and directions.”
- “Some areas covered well, Some could better be developed to maximize effectiveness.”
- “Unless you like to drink, there is no real ‘nightlife.’”
- “As you leave Las Vegas there are large billboards advertising biking in Moab and visit St George, etc. we need one advertising to escape the crowds and come get primitive in Lincoln County. There should be signs all up and down I-15 from SLC south to Vegas!”

Tourism Support and Enablers

N = 32



- Tourism support and enablers for Lincoln County are lacking with an overall average rating of 2.27
- Transportation options was the lowest rated facet, as the destination is primarily a drive market
- Stakeholders from Pioche rated all supports and enablers lower than other stakeholders

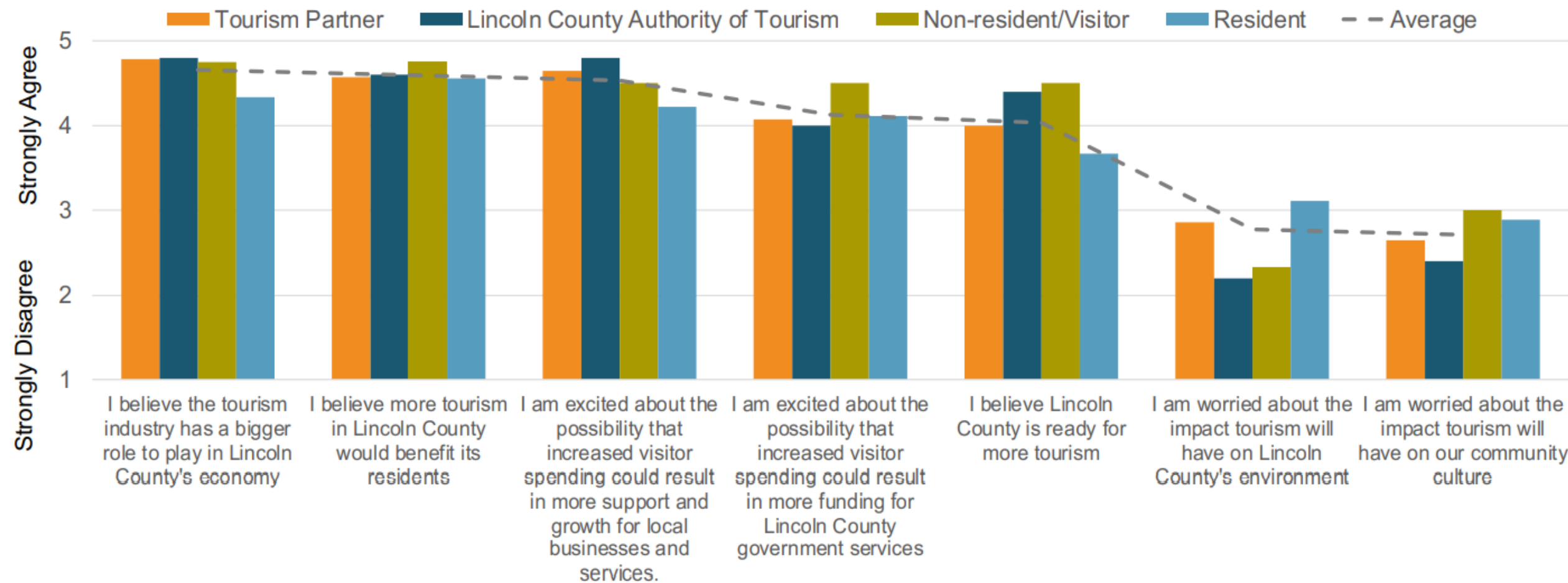
- Support from the government as well as tourism stakeholders is lacking; perceptions exist that both the private and public could do more to support and fund tourism.
- Resident support of tourism was also rated low; perceptions exist that residents are unaware of the benefits of tourism.
- Wayfinding and public infrastructure was rated low by non-visitors; perceptions exist that lack of proper signage and infrastructure is holding back the destination

Tourism Enablers and Support

- “Limited infrastructure, food all tastes the same, only a couple of stores, mediocre motels.”
- “The general population is not aware of how important tourism is to our county.”
- “In general, not much is visible about generating tourists, but we still see decent attendance.”
- “Trying not to be negative but it all goes back to infrastructure.”
- “The signs on highway 93 stating where Delamar is both say Delmar. It is Delamar. Other signs could be repaired and corrected as well.”
- “The businesses in the County are not invested in the County as a destination. They say they need more visitors to support their business yet with the exception of a few who are highly invested in community development, most spend their money outside of the county.”
- “State of Nevada and our area's State Legislators need to do more to boost tourism funds and infrastructure capital for Lincoln County. We do not receive enough capital funds for any brick and mortar projects. Elected officials should be bringing in private sector dollars from big business that profit from our area's resources and residents. Stop sending money to Utah for sales tax and bring business here”

Tourism Opinions

N = 32

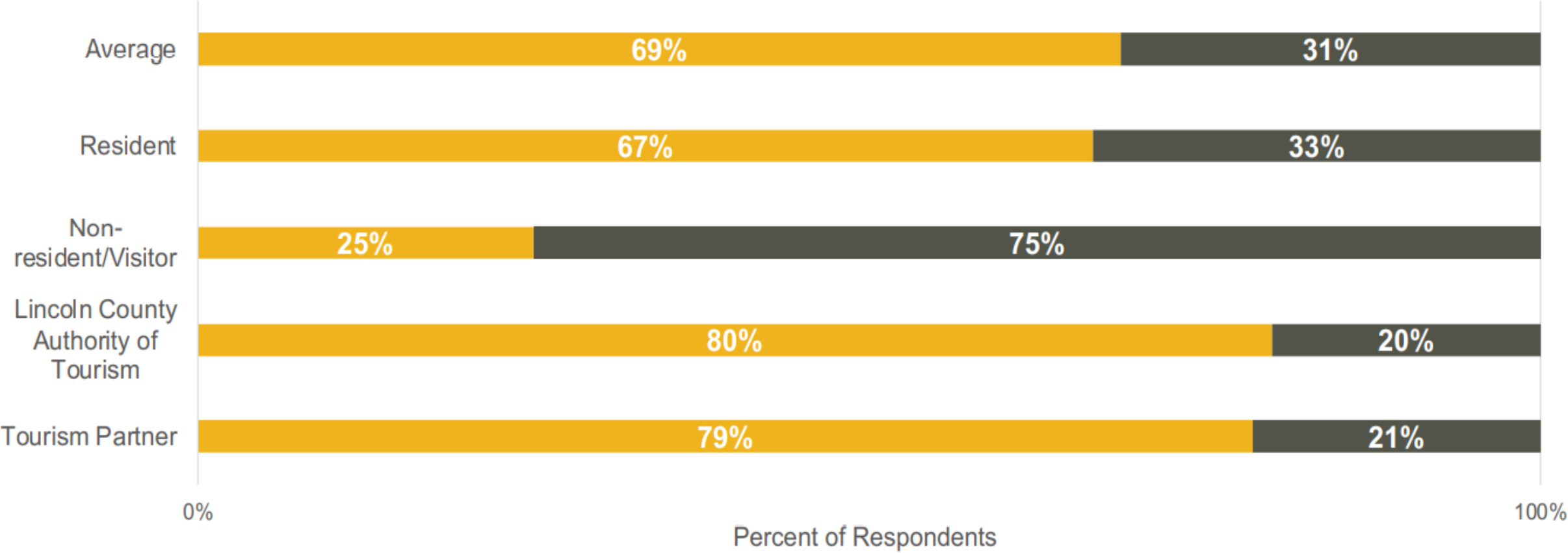


- Stakeholders are overall aligned on tourism's role in the county
- Stakeholders are excited about tourism playing a larger role in the county's economy and believe the county is ready for more tourism.
- Stakeholders were not concerned with any possible negative impacts tourism could have on the county.
- Stakeholders from Pioche are slightly less excited about tourism and slightly more worried about the negative impacts of tourism.

Quality vs Quantity of Visitors

N = 32

- Quality of Visit: Manageable number of diverse visitors, longer stays, higher spend per visit
- Quantity of Visitors: High numbers, higher total spend, shorter stays



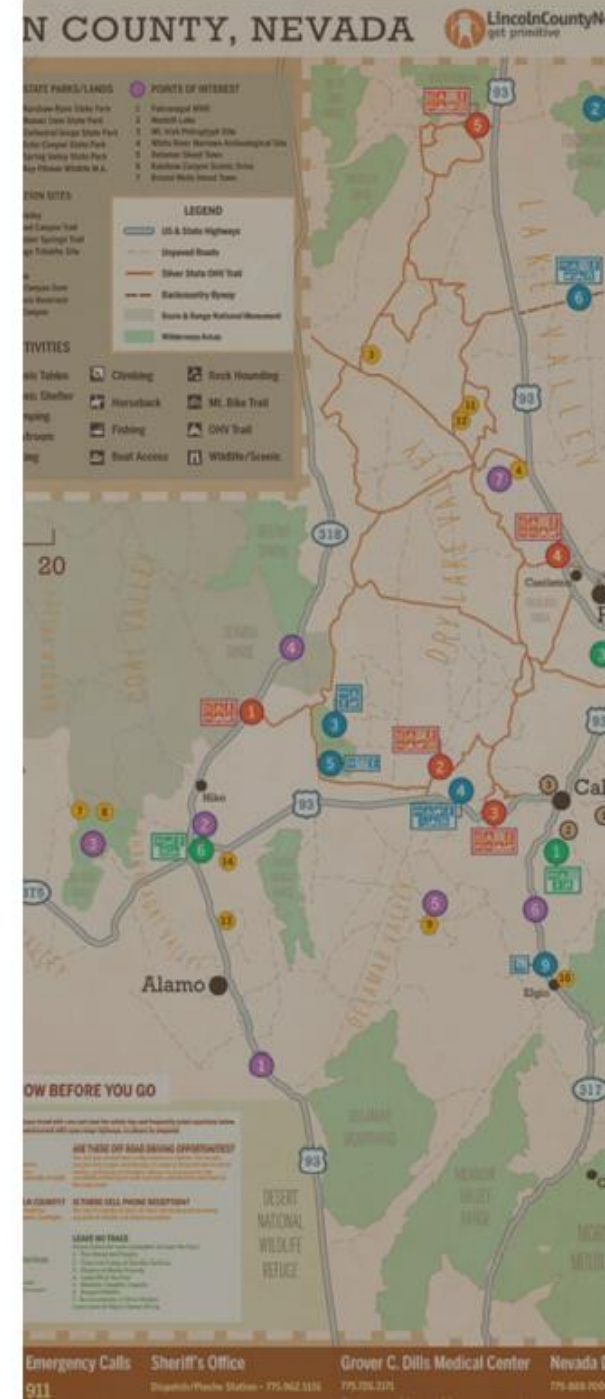
- Stakeholders across the board agree that the focus should be on the quality of the visit rather than the quantity of visitors, apart from visitors from Alamo who would like to see more visitors.

Tourism Opinions

- “If done right, concerns about adverse impacts to communities could be diminished. Overall, something needs to be done to increase tourism to the area as an interface to our rich history and rural beauty.”
- “We need more community buy-in and that starts with our elected officials.”
- “Until the push for mountain biking started 3 years ago, there was a struggle to get the community involved but I think that push has resulted in more enthusiasm for our motel/restaurant/local business to actively participate. I believe it is always a struggle to get our county and city leaders to move aggressively.”
- “To keep our natural beauty, we need to be very careful in making sure that it stays that way because this is what the tourists are coming for and that is why I choose to live here.”
- “We really need to facilitate business growth and incubate new businesses that are tourism-focused.”
- “The potential for Lincoln County is huge. A bustling and vibrant tourist economy would create opportunities for all residents.”

Key Destination Themes

1. Lincoln County's assets do not align with the core tourism offering of Nevada and the Silver Trails Territory: Gaming and Dining
2. Stakeholders believe the destination's primary tourism asset is outdoor recreation, specifically state parks, but this is not a primary driver of visitation in the territory (6%)
3. The county's relative proximity to Las Vegas provides an opportunity to offer visitors an outdoor destination that is still close to gaming activities
4. The importance of tourism assets is perceived differently by the Lincoln County Authority of Tourism, who also have a more optimistic view of the county's tourism drivers
5. Stakeholders believe increased tourism would be beneficial to the county and its residents, but requires more support from the government, the tourism industry, and residents
6. While stakeholders are ready to see more tourism, they would like to see the focus on attracting quality visitors rather than quantity of visitors.
7. Stakeholders believe the county does not have the supports and enablers necessary to handle increased tourism
8. Lincoln County is mainly a drive destination and is perceived to be lacking in infrastructure and proper wayfinding
9. The COVID-19 pandemic has created an opportunity for rural destinations to increase visitation as visitors look towards more open and socially distanced activities
10. The county will need to develop its revenue generating assets to increase tourism spending and tax revenues



Discussion

What made sense?	What might be missing?	What needs clarification?
Information and wayfinding (brown signs) with NDOT is an ongoing challenge; they're more urban-focused	Engaging USDA's rural development squad; continuity through turnover to new administration and through retirements; rural and outdoor rec to continue to be a key part	How to determine resources and get their support
How much of a challenge it is for revenue-generating businesses to make the investment and take the risk to create those businesses. How do we help businesses be more tourism-minded and understand how to market to out-of-county visitors? Get the resources aligned with businesses in the community.	Emphasis on the importance of mountain biking to Lincoln County, perhaps because the effort is newer	How much of an issue is our proximity or distance from a fast-growing MSA?
Alignment on how important our recreation assets and quality visitation are	historic preservation infrastructure improvement, working with State Historic Preservation Office to garner more resources for LC	
	LCAT to work to lobby/advocate to our State Legislators and LC Commission regarding certain budgets	
	How to start certain types of businesses in LC by relevant area—technical assistance for business owners; how to work with different agencies and boards	