

Table of Contents

Executive Summary

Strategic Objectives

Background

History

Mission Statement/Guiding Principles

Organizational Chart

Current North Lake Tahoe Visitor Statistics

TOT Information

Research and Insights

Creative Strategy

Brand Pillars

Campaign Platform: Human Nature

Target Audiences

Paid Media Strategy

Owned Channel Strategy

Earned Channel Strategy

Leisure Sales Strategy

Conference Sales Strategy

Events Strategy

Leisure Sales Strategy

Industry Partnerships

Measurement Approach

Budget Breakdown

Appendix

Competitive Analysis

Leisure Sales Key Terms

Executive Summary

As North Lake Tahoe continues to grow and mature, so does the North Lake Tahoe Resort Association (NLTRA), investing in programs and procedures that showcase the region to both new and returning visitors each year. We are lucky to live in such a place that has inspired so many. From famous athletes, wellness seekers and film directors, to government officials and eccentric billionaires—there is something special about North Lake Tahoe. Our goal is to share the experiences, unique characteristics and secrets of the region with visitors who may be just as inspired.

With the largest concentration of ski resorts in the nation, North Lake Tahoe is known for its world-class skiing and snowboarding—but year-round experiences are equally as enchanting. Our goal is to not only drive visitation to the region, but to act as stewards for North Lake Tahoe partners, especially during our shoulder seasons. We want to guide our partners, stakeholders and community members to do the same by creating shared messaging, content and marketing opportunities.

As a tourism-based region, the travel and tourism industry is vital to not only bring visitors to North Lake Tahoe, but also to act as an economic driver for the region, generating jobs, creating businesses and enhancing the quality of life for the area. Travel related spending in Placer County totaled 1.1 billion in 2017. In North Lake Tahoe alone, 50 percent of all employment can be attributed to the leisure industry, making tourism a significant and vital component for the region. As travel becomes easier for consumers, the competition to gain that consumer as a visitor becomes ever increasing. In order to stay top of mind with our target audience, the NLTRA needs to be nimble in the marketplace. As market conditions shift, the NLTRA updates its programs accordingly to best capitalize on market opportunities, and to maximize ROI. This is key in a destination that is very weather dependent, as the NLTRA can adjust programming to drive visitation when needed (shoulder seasons, low/late season snow years, midweek, international). Additionally, this means being present where consumers are digesting information – i.e. consumer publications and newspapers, social media, digital advertising and Google searches. Without the investment of driving awareness for the destination, North Lake Tahoe will fall behind our fierce competition that is vying for that same visitor.

With that in mind, the efforts of the NLTRA to promote the region are to bring success to our tourism-based economy, the businesses that thrive on visitation, and the community at large. In partnership with the Incline Village Crystal Bay Visitors Bureau, via the North Lake Tahoe Marketing Cooperative, we look forward to continued collaboration with our partners to push forward our acclaimed destination.

Daphne Lange

Tourism Director

Strategic Objectives

Position North Lake Tahoe as a year-round/four-season destination

- Adjust content on GoTahoeNorth.com so that it positions Tahoe as a four-season destination—presenting options for all four seasons as opposed to promoting one season at a time
- Create ongoing flow of evergreen content that allows GoTahoeNorth.com to act as an information hub in assistance with trip planning
- Invest in more video content that showcases the destination in all four seasons – video content would be pushed across all promotional channels and in international markets

Increase visitation during Spring and Fall, targeting Bay Area/Sacramento using events as a key driver

- Develop targeted communication initiatives based on segmentation research to reach audiences whose interests align with off-season activities and events
- Expand and prioritize targets by season
 - Micro-target niche audiences whose passions align with spring and fall activities such as: sport fishing (Rainbow Trout, Mackinaw), fly fishing, golf, mountain biking, sunset dinner cruises, stand-up paddleboarding, music festivals, kayaking, photography (fall colors), hang gliding, horseback riding, etc.
- Utilize relationships with travel trade partners to increase product in priority international markets
- Use meetings and events as a means of attracting first-time visitors to the area during shoulder seasons

Increase mid-week visitation

- Increase long-haul group/conference business. Meeting and event planners are more likely to book during off-season and mid-week, and attendees are more likely to extend stay prior or post event
- Work with area hoteliers, attractions and other local businesses to create and promote special mid-week, value-added packages
- Target audiences based on interests and behaviors that align with flexible schedules and a propensity to travel

Increase length of stay and visitor spending year-round

- Develop more interest-based, multi-day itineraries on the website. (Recent Destination Analysts research suggests that the website can play an important role in extending length of stay.)
- Work with the Regional Air Service Corporation (RASC) to increase lift into Reno International Airport. (International travelers tend to use either LAX or San Francisco International Airport.)
- Continue efforts in top international markets – UK and Australia whose preference for outdoor adventure aligns perfectly with North Lake Tahoe’s offerings—especially during the fall

NLT Tourism Development Plan Draft

- Work closely with Black Diamond in the UK and Gate 7 in Australia to support all sales and promotion efforts.
- Work with Visit California and Travel Nevada to increase North Lake Tahoe's exposure with international visitation:
 - Look towards new opportunities in English speaking markets like Canada and India.

Create opportunities for new market entry that aligns with direct lift into Reno/Tahoe Airport and Sacramento Airport

- Utilize digital media to test interest in new markets.
- Look to partners to leverage opportunities already available, i.e. media missions, journalist FAMs.

Increase the number of conference leads and bookings

- Improve Meetings and Events section on the website
- Improve media exposure and return on media spend
- Support all trade show activities and ensure the sales force has the tools they need to effectively sell the destination

Increase stakeholder communication and partnership opportunities

- Create opportunities for partner engagement
- Increase co-op marketing offerings available for partner buy in
- Become key distribution source for research, various state cooperative marketing opportunities, key messaging points and events

Critical Success Factors

- By 2020, increase Destination Visitors (visitors arriving from outside of the drive market) year-round to North Lake Tahoe by 10% in summer and winter over summer and winter of 2014/15. (10% increase in summer = 29% arrive by air; 10% increase in winter = 40% arrive by air.)
- By 2020, increase engagement by Millennials by 20%, Increase occupancy in September/October and May/June by 20%.

Background

History of the Resort Association and Tourism Planning in North Lake Tahoe

In 1995, Placer County, with the assistance of local concerned citizens, created the first Tourism Development Master Plan for North Lake Tahoe to serve as an initial guide for tourism development strategies and investments. The purpose was to develop a plan that would give guidance to improving our visitor experience and allowing a better edge for competing with other destination resort areas. Its centerpiece recommendation was the formation of a regional resort association that would provide a local leadership body to help steer and implement the 1995 Tourism Master Plan strategies. This leadership body was named the North Lake Tahoe Resort Association (NLTRA) which today continues to serve the role of providing local leadership. NLTRA is a merger of many interests, an organization that became the keeper and champion of North Lake Tahoe's economic and tourism vision. Since its inception in 1995, NLTRA has been successful in many ways, such as obtaining support for increasing the TOT by 2%, creating award-winning marketing programs and serving as an advisory body for the Placer County Board of Supervisors to facilitate physical improvements in the area. Since 1995, two additional tourism master plan updates have occurred in 2004 and 2015.

Mission Statement/Guiding Principles

The NLTRA and IVCBVB work collaboratively across state lines to promote the region as a whole. This partnership results in the North Lake Tahoe Marketing Cooperative.

NLTRA Mission

To promote tourism and business through efforts that enhance the economic, environmental, recreational, and cultural climate of the area.

IVCBVB Mission

To encourage tourist visits and ultimately enhance the occupancy and revenues for lodging facilities in the Incline and Crystal Bay areas.

NLT Marketing Coop Mission

The mission of the NLTMC is to bring together public and private organizations and businesses to contribute marketing dollars and expertise to position the North Lake Tahoe region as one destination, to focus on identifying regional, national and international markets, and to target common tourism industry interests and desires for cooperative action and marketing programs.

NLTRA Guiding Principles for Tourism Development Efforts

NLTRA combines resources to promote the overall North Lake Tahoe region in ways that individual businesses cannot.

North Lake Tahoe Resort Association in partnership with the Incline Village Crystal Bay Visitors Bureau and its business members, provides a single marketing sales and communications platform to promote the North Lake Tahoe brand and destination. These entities serve as an authority on travel and tourism to the various

NLT Tourism Development Plan Draft

communities of North Lake Tahoe and engage in opportunities and partnerships that will elevate the profile of the region. North Lake Tahoe Resort Association and Incline Village Crystal Bay Visitors Bureau unify business and community leaders to raise the relevance of travel to the destination and enhance the area.

NLTRA builds awareness and preference for the North Lake Tahoe brand to stimulate travel from long haul and drive market destinations, primarily focused on non-peak and mid-week periods.

We work with our business community to develop complementary marketing programs (including, but not limited to events, digital advertising, social media, public relations, video, search) that attract new visitation to the destination from both long-haul markets where travelers book early and stay longer and drive markets during off peak times. We respond during times of special needs, making adjustments to target areas that may not be within above parameters. Increased marketing investment will provide opportunities to reach new markets that have been otherwise cost-prohibitive.

NLTRA leverages and builds resources and alliances to efficiently create opportunities otherwise out of reach for individual businesses.

We establish partnerships and alliances that introduce the destination brand to audiences otherwise out of reach for the destination. Partnerships are used to support efforts via advertising and other channels regionally and in selected countries that develop greater awareness for the North Lake Tahoe area.

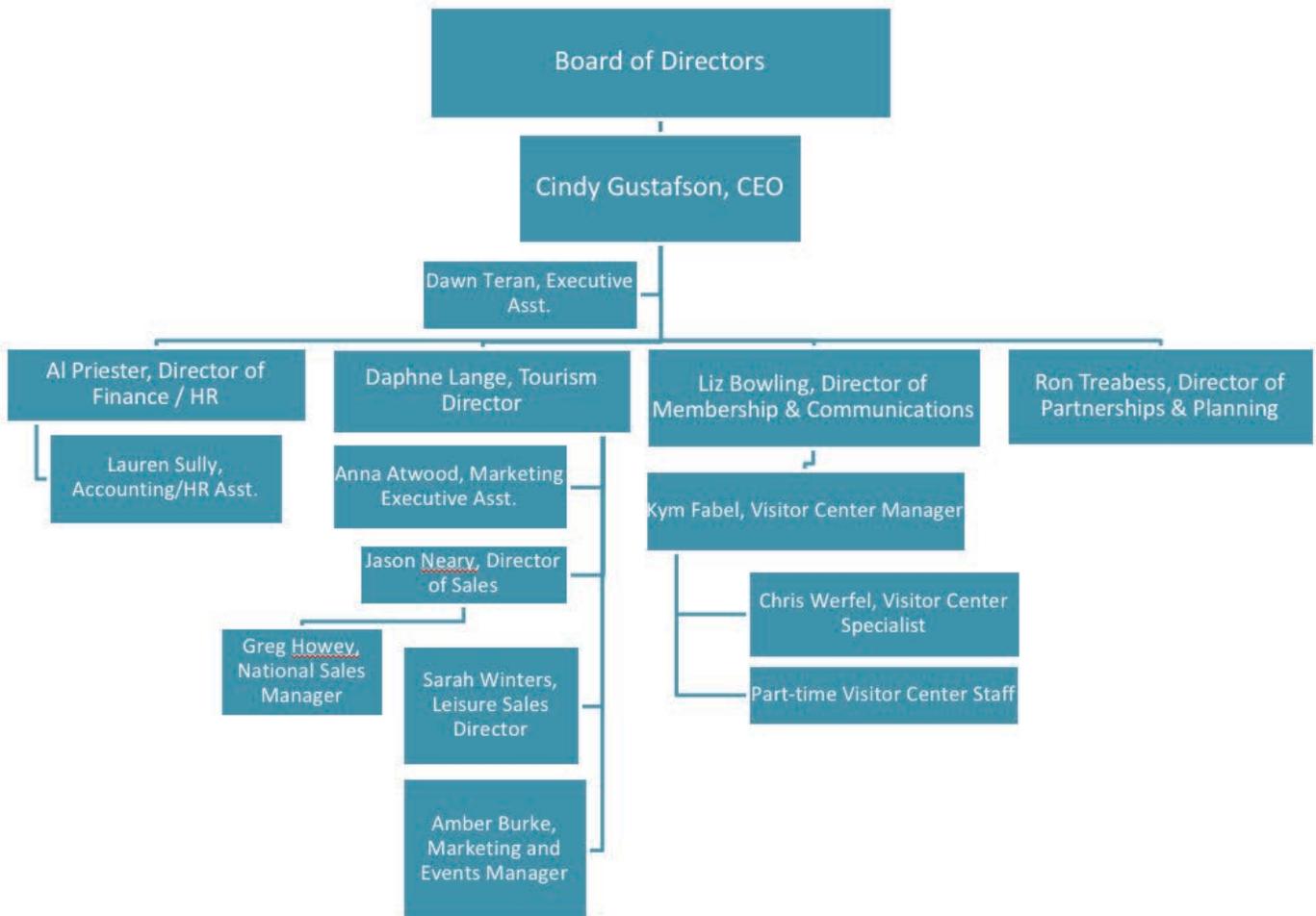
NLTRA supports partner businesses/organizations and the wider local economy by acting as a coordinator of information, opportunities, and resources.

We provide resources to partner businesses and others through marketing options, social media insights, a robust website presence, educational opportunities and dissemination of tourism research materials helpful to the success of their endeavors.

NLTRA tracks key metrics and ROI to inform the strategic direction and effectiveness of the program of work.

We track and evaluate program impact on attracting leisure and conference/meetings travelers to reinforce the organization's value to travel-related businesses and the North Lake Tahoe community as stewards of public funds.

Organizational Chart



Current North Lake Tahoe Visitor Statistics

North Lake Tahoe sees over 1,250,000 visitors a year

- 68% of current visitors are from the Bay Area, Northern California and Nevada
 - The majority come from San Francisco Bay Area or Sacramento, Los Angeles, San Diego and Reno
- Approximately 21% arrive from air (Overnight visitors arriving by air provide 28% of total visitor spending and stay an average of 5.5 days.)
- 8% of total visitors are international
- 42% of total visitors are day trippers
- 66% repeat visitation (13% of visitors made 15 or more visits in the previous five years)
- 48% of current visitors have children living at home
- 47% come to visit with family friends, 36% come for recreation, and approximately 5% special event¹
- Only 20% plan their trip within two weeks. 26.7% planned their trip 3 - 4 weeks in advance, 21.7% planned 1 - 2 months in advance, 17.5% planned 2 - 3 months in advance and 14.2% planned more than 3 months in advance
- 89.3% of visitors arriving by air flew into Reno International²

VisaVue Data³

Top Countries By Spend (\$)
Canada
United Kingdom
Australia
China
France
Germany
Mexico
Argentina
New Zealand
Singapore

Top Domestic Markets By Spend (\$)
San Francisco – Oakland
Sacramento – Yolo
Reno, NV
Los Angeles, Riverside, CA
San Diego, CA
New York
Seattle, Tacoma, Bremerton
Phoenix, AZ
Salinas, CA
Washington, Baltimore, DC

¹ Dean Runyan Associates. 2003–2012 Detailed Visitor Impact Estimates

² North Lake Tahoe Resort Association 2016 Website User & Conversion Study Q2 Interim Update. Destination Analysts

³ This is just tracking from Visa credit cards and does not include other key cards. A snapshot, but numbers are most likely higher than displayed.

International Data

- 2016 Statistics
 - 2.6% growth y/y
 - \$4,424,824 total spend
- 2017 Statistics
 - 19.7% growth y/y
 - \$5,297,706 total spend

Domestic Data

- 2016 Statistics:
 - 20.5% growth
 - \$417,269,271 total spend
- 2017 Statistics:
 - 7.2% growth
 - \$447,200,876 total spend

TOT Information

Research and Insights

Economic Information

- Placer County Travel Expenditure
 - \$1.1B travel-related spending
 - \$79.7M tax revenue
 - 11.2K Employed in travel related jobs
 - 200M in job earnings directly impacted by travel
- California Travel⁴
 - Direct travel-related spending in California totaled \$126.3B in 2016.
 - Direct travel-generated employment neared 1.1 million, a 3.1 percent increase over 2015.
 - Travel-generated tax revenue topped \$10.3B.
 - Room demand increased by 1.8 percent.
 - Visitor arrivals on domestic flights increased by 7.2 percent.
 - \$6 out of \$10 spent at local visitor destinations were attributable to residents of other states and countries.
 - The GDP of the California travel industry was \$68.6B in 2016, which represents about 2.5 percent of the total GDP of the state
 - Total international visits to California will decline by 0.9 percent in 2017 before picking up to just above 2.5 percent in 2018 and increasing each year through 2021.
 - Total visitation to California is forecast to grow 2.1 percent in 2017

Total International Arrivals

- 5,870,846 May Total U.S. Visitors Citing California as First Intended Address⁵

Domestic Travel to California Long-Haul Domestic Profile⁶

Major Takeaways

- Top long-haul states of origin in 2016 were Texas (14.1 percent) and Florida (12.6 percent).
- Primary purposes of trips were leisure (80.6 percent), visiting friends/relatives (59.4 percent) and business (31.4 percent).

⁴ Source: Visit California/Tourism Economics

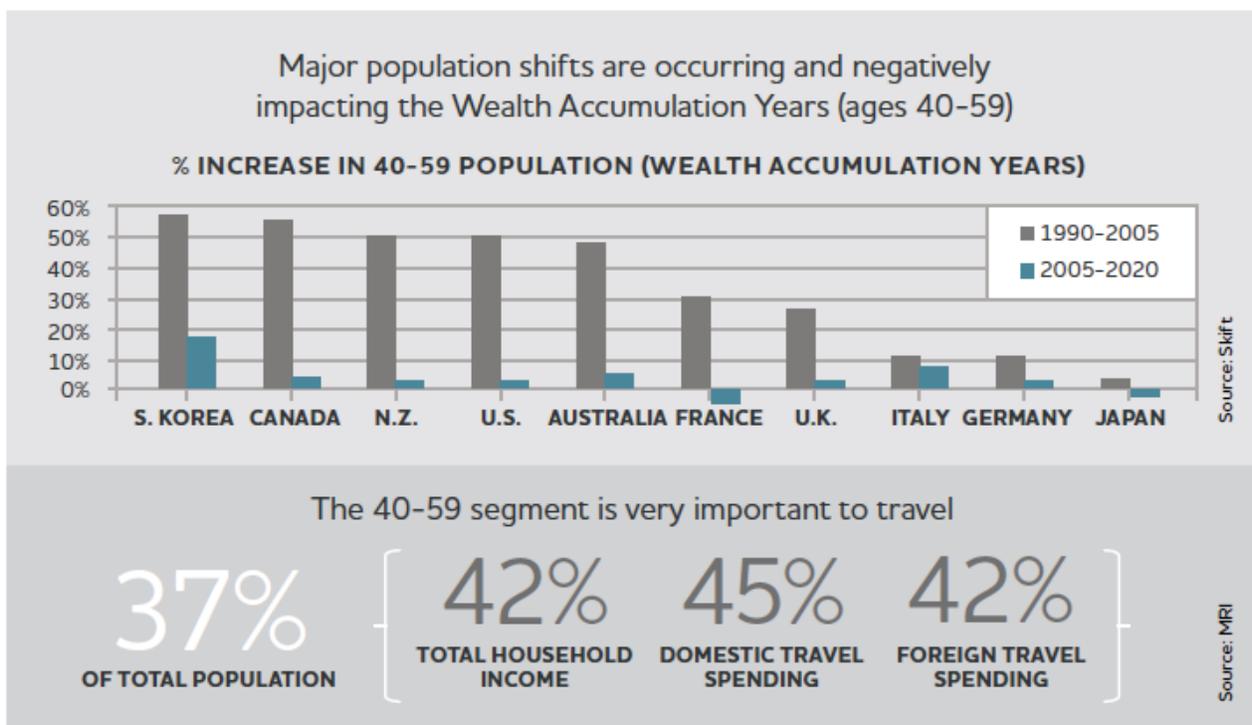
⁵ 2017 California Overseas Point of Entry Arrivals U.S. Dept. of Commerce, National Travel & Tourism Office (NTTO)

⁶ TNS TravelsAmerica, 2016 Domestic Travel to California (Long Haul States)

NLT Tourism Development Plan Draft

- The primary modes of transportation used on trips were airplane (56.8 percent), personal auto (21.7 percent) and rental car (14.1 percent).
- Average spending per visitor in HH was \$661.
- Top trip activities were shopping (32.9 percent), beach (28.0 percent) and visiting relatives (26.4 percent).
- Domestic leisure travel is expected to outperform the domestic business market each year through 2021.
- Millennials are a very important audience/attendee group to consider when aligning with events. The following is based on The Experience Movement: Research Report conducted by Eventbrite in partnership with Ipsos and Crowd DNA.⁷
 - Millennials make up one third of the U.S. population and 75% of millennials say they value experiences over things.

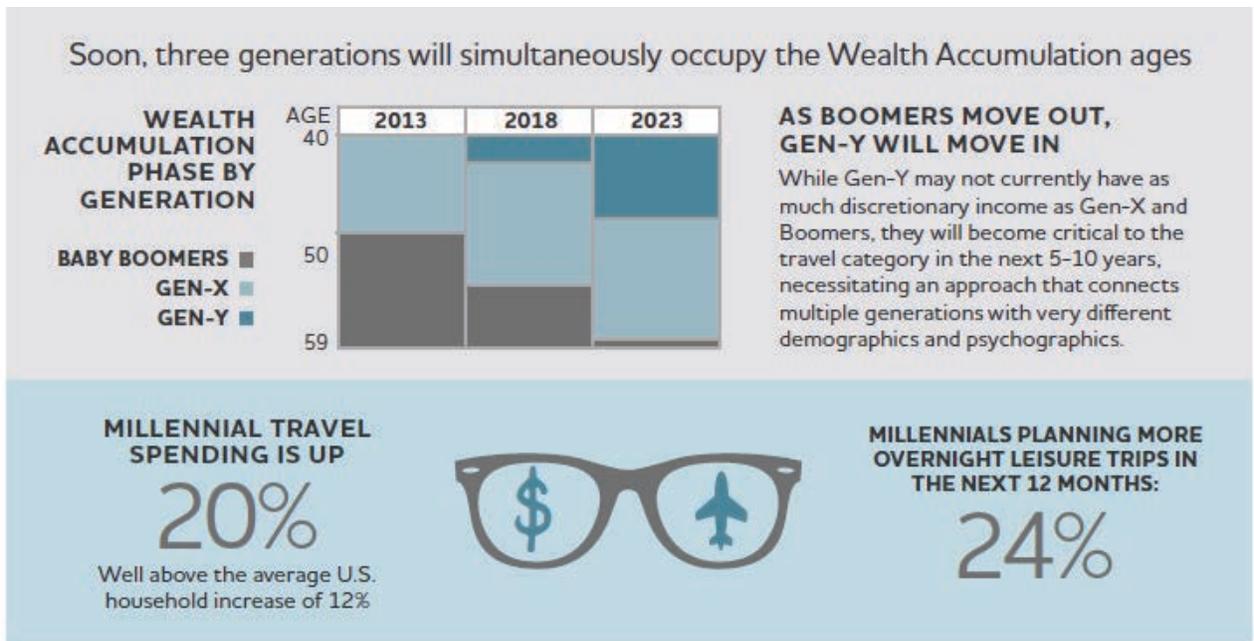
Although they may be outnumbered by millennials, baby boomers still account for around 75 million Americans, and are becoming an even more substantial portion of the traveler population⁸. According to Phocuswright, nearly three in 10 U.S. leisure travelers were baby boomers in 2016, up from 24 percent in 2015. Boomers may take fewer leisure trips each year, but when they do travel, they take longer trips – often seven nights or more – and spend more money. Boomers are the only age group that increased travel spend from 2015 to 2016. Travelers in the 55-and-older segment are more likely to spend more than \$1,000 per trip. Almost half of boomer travelers spend approximately \$3,000 per year on travel, making them a higher-spending group than other age group.⁹



⁷ <https://www.eventbrite.com/l/millennialsreport-2017/>

⁸ <https://www.phocuswright.com/Travel-Research/Research-Updates/2018/Millennials-Who-Cares-Boomers-Are-Where-The-Money-Is>

⁹ Source: U.S. Travel February Outlook



International visitation to the U.S. was down 3.6 percent¹⁰ for the first eight months of 2017 compared to the first eight months of 2016, according to the Commerce Department. The U.S. received 48.8 million international visitors to the U.S. over the first eight months of 2017:

- 14 million came from Canada, up 4.5 percent year-to-date from 2016
- 11.2 million came from Mexico, down 7.6 percent year-to-date, meaning that
- 23.6 million visitors came from overseas, down 6 percent year-to-date

Of the top 20 tourist-generating countries to the U.S., nine reported increases (South Korea, Ireland and Canada the fastest-growing markets) and 11 reported decreases (Argentina, India and Brazil with the three-fastest declines). (Source: U.S. Travel February Outlook)

International Travel

- California saw 17.3 million international trips in 2016
 - 7.8 million were from overseas
 - 7.9 million were from Mexico
 - 1.5 million were from Canada
- Top overseas markets visiting California in 2016:
 1. China - 1,361,000 trips
 2. United Kingdom - 693,000 trips
 3. Australia - 604,000 trips

¹⁰ <https://travel.trade.gov/view/m-2017-I-001/index.asp>

4. Japan – 548,000 trips
5. South Korea – 470,000 trips

Brand USA research shows that most top international visitor markets – except for China – are less inclined to visit the U.S. because of the current political climate.¹¹ While spending from foreign visits hit a record high \$247.1 billion in 2016, a decline in international travel is expected due to the strengthening of the dollar, making travel to the U.S. more expensive. However, China is still showing as one of the only markets to continue to increase visitation and spending in the U.S. year-over-year.¹²

Consumer Trends and Insights

Consumer Behavior

Micro-Moments: The Consumer Journey

As travelers are making decisions faster than ever before, they're also researching more than previous behavioral patterns suggested, with information readily available at their fingertips. As consumers work toward booking their next adventure, they navigate a four-step decision-making process:

1. Inspiration and dreaming
2. Consideration and planning
3. Decision and booking
4. Exploring and experiencing

Inspiration and Dreaming

When beginning the trip-planning process, travelers look for inspiration to guide them toward the destination of choice. The average American consumer embarks on a 44-day trip-planning journey, from the point of inspiration to following through with booking travel.¹³ Of course this fluctuates based on the distance traveled or the purpose of the trip. Initially, the concern is with the location(s) they'll be experiencing; the airline (if necessary), hotel and other logistics will follow. This is the most influential phase of the trip-planning process, making it crucial for brands to provide inspirational content that helps influence decisions early on. That said, 76% of travelers are more likely to book with a travel brand that provides relevant information up front as they're researching options.¹⁴

Consideration and Planning

When zeroing in on the actual planning portion of the process, it's important to factor the average consumer's frame of mind and timeline. Consumers begin focused research within a 44-day window from their actual travel

¹¹ skift.com/2017/03/30/brand-usa-survey-finds-u-s-politics-increasingly-a-reason-not-to-visit/

¹² skift.com/2017/07/20/international-tourism-to-the-united-states-dropped-in-2016/

¹³ Path to Purchase American Study, Expedia Media Solutions & comScore 2016

¹⁴ thinkwithgoogle.com/marketing-resources/micro-moments/get-away-moments-travel-marketing/

NLT Tourism Development Plan Draft

date. Furthermore, they spend around 45 days researching various destinations, experiences to be had and logistics, accumulating an average of 140 visits to travel sites.¹⁵

Decision and Booking

At this stage, the consumer has decided upon the destination of choice and they begin booking the trip. However, before reservations can be made, further research may be necessary to select a lodging property or campground and build details for their trip itinerary.

Exploring and Experiencing

The final piece of the consumer journey comes with the actual trip itself. This is just as crucial as the other stages, as it's one's personal experience, which will most likely live on through word-of-mouth reviews for friends and family and social media posts. It's still important for the brand to engage with visitors as opportunities present themselves, to help build brand loyalty and ensure the traveler will be eager to book a return visit.

Marketing Trends

1. Travelers want a story, not to be told what to do.
Today's consumers are hit with so many brand messages on a daily basis that it's easy for brand messages to become white noise. Brands can break through the clutter with a storytelling approach - prioritizing authentic, compelling content that a consumer cares about over sales-y content that centers around a call-to-action.
2. Influencers are blurring lines in the Earned and Paid Media arenas.
More and more, influencers are overlapping with journalists as "earned" coverage, as well as with paid media as "paid" features. Brands should consider influencers as a separate, blended entity, and find creative ways to incorporate them into overarching strategies.
3. Social media brand reach has become smaller and less impactful.
For brands, the reach and impact of social media, in a traditional sense, has shrunk annually. In order to keep ahead of social media and still create impact through these channels, brands must harness new social channels as much as possible, and must prioritize quality engagement from audiences over all other social metrics.
4. Boomers are moving out, Millennials and Generation Z are moving in.
Brands have come to accept and market to millennials in recent years, but now must consider its younger counterpart - Generation Z - as an influential target audience, as this group is coming into its buying power. Similarly, as boomers are traveling less and less each year, brands should consider how to shift attention toward younger demographics.
5. Video is the most impactful and engaged with format of content.
Especially in the destination space, video content continues to be the best in terms of message recall and engagement, and should be a driving force behind any brand strategy.
6. Experiential marketing is on the rise.
Attendees crave personalized and unique experiences, as shown in a recent industry study: 79% of brand

¹⁵ Path to Purchase American Study, Expedia Media Solutions & comScore 2016

respondents said they would execute more experiential programs this year compared to last. Per a study done by Eventbrite, 95% of event creators who used experiential marketing in in 2017 found it effective.

Thematic Trends

1. Authenticity

Consumers continue to respond best to brands that employ an “authentic” approach, focusing primarily on the story and benefits behind a destination. To achieve ongoing authenticity, the “book now” message should always come as secondary to the brand’s overarching story.

2. Wellness and Mindfulness

“Wellness” is a hot topic in today’s market, and audiences are trying to place a higher importance on their physical and emotional health. This has carried over to the tourism industry, and today’s traveler is driven to find a vacation that will give them more than just memories, but higher levels of self-actualization.

3. The Evolution of Luxury

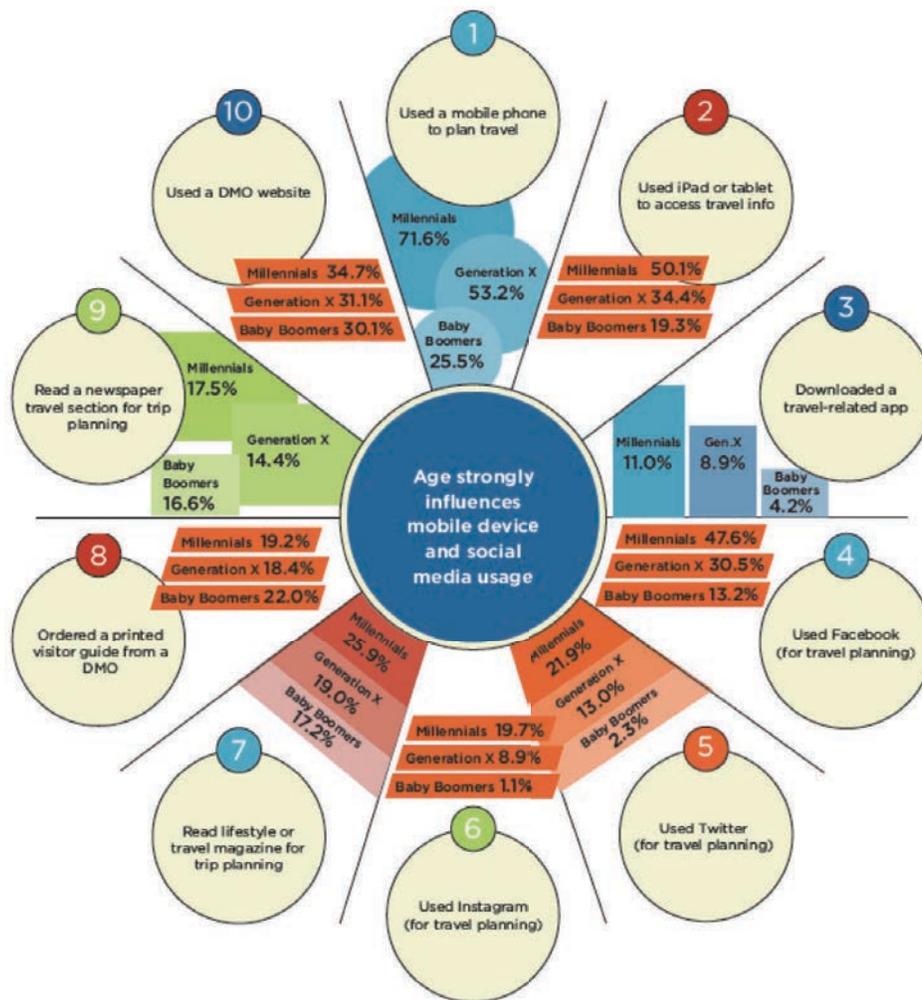
Luxury has evolved from a straightforward category of travel to a nuanced state of thinking. Today, “luxury travel” means the ability to shut down the phone, immerse fully in an experience, and come away from a trip at a higher level of fulfillment and self-actualization. Destinations with a traditional “luxury” background can leverage this evolution by pairing traditional luxury with experiential messaging. Trend Watch

Mobile Technology

Travelers’ reliance on mobile technology is increasing exponentially, with no sign of slowing down.

- People now spend more time online via mobile devices than on desktop or laptop computers, especially during the inspiration and planning stages of the consumer journey.
- Mobile technology has empowered travelers, fundamentally impacting the way they select, research and book travel. Recent research by Expedia explains:¹⁶
 - 65% use smartphones when deciding which destination to visit
 - 63% use smartphones when looking for things to experience when in-market
 - 54% use smartphones when choosing lodging accommodations
 - 37% use smartphones when decided how to book travel

¹⁶ ComScore. 2016 U.S. Cross-Platform Future in Focus



Bleisure Travel

Business travelers, like other consumers, are placing a greater emphasis on a work-life balance. As such, business travelers –especially Millennial business travelers—are increasingly adding more leisure into their business travel: extending trips over the weekend—and often bringing the family along. It’s important to note that Bleisure travel isn’t just about attaching extra vacation days to business travel—it’s lifestyle that combines business and pleasure at all times.

- 94% of younger travelers are more likely to take a Bleisure trip in the next five years.
- Millennials (18-34 yrs. old) are more likely to combine business with pleasure compared to older travelers (34-44 yrs. old): 56% versus 37%¹⁷

DMO Websites

Research shows that year-over-year, more consumers are turning to Online Travel Agent (OTA) types of websites, to book travel, whether that be airline, lodging or any other reservation type. Being responsive to this trend, it’s

¹⁷ Bridgesteet Global Hospitality: Bliesure Report

NLT Tourism Development Plan Draft

essential for travel brands and destination marketing efforts to reach consumers earlier in the trip-planning process, inspiring decision-making and being present as a solution for consumers as they learn more about things to do while visiting.

The average traveler will visit 34 websites over 8.5 sessions as they navigate the various phases of the consumer journey.¹⁸

Likewise, destination websites must be conducive to meeting the needs of consumers. Travelers are turning to DMO sites as an important resource for trip inspiration, as well as building out specific itinerary details. In fact, in January 2017, over one-third of American leisure travelers reported having used a DMO website in the past year to research and/or plan travel – this is up about 10% from July 2009.¹⁹ Content must be enticing and inspiring. Information needs to provide insight into the types of experiences one can have while in-market. Lodging and other business listings are also important, however should not be the focus of a site. Recent Destination Marketing Association West research details that while 59% of DMO website users have already made up their mind about visiting the destination, nearly 40% were potential visitors, being open to influence in making the destination decision. Furthermore, 78% of potential visitors reported booking a trip to the destination after using the DMO website.²⁰

Digital Visitor Guides were the most commonly sought out marketing asset among consumers (50.9%) during their trip planning process. Printed guides followed second at 26.4% and 14.1% of DMO website users also accessed the destination's social media content while planning the trip. Moreover, consumers have cited DMO sites as influencing trip decisions associated with things to do and experiences to be had. Only 12% of site visitors noted the information being impactful when deciding upon a lodging property.²¹ In other words, consumers are motivated to book a trip to a destination based on experiences, events and other things to do while in-market. Once they have decided to visit, lodging reservations follow naturally.

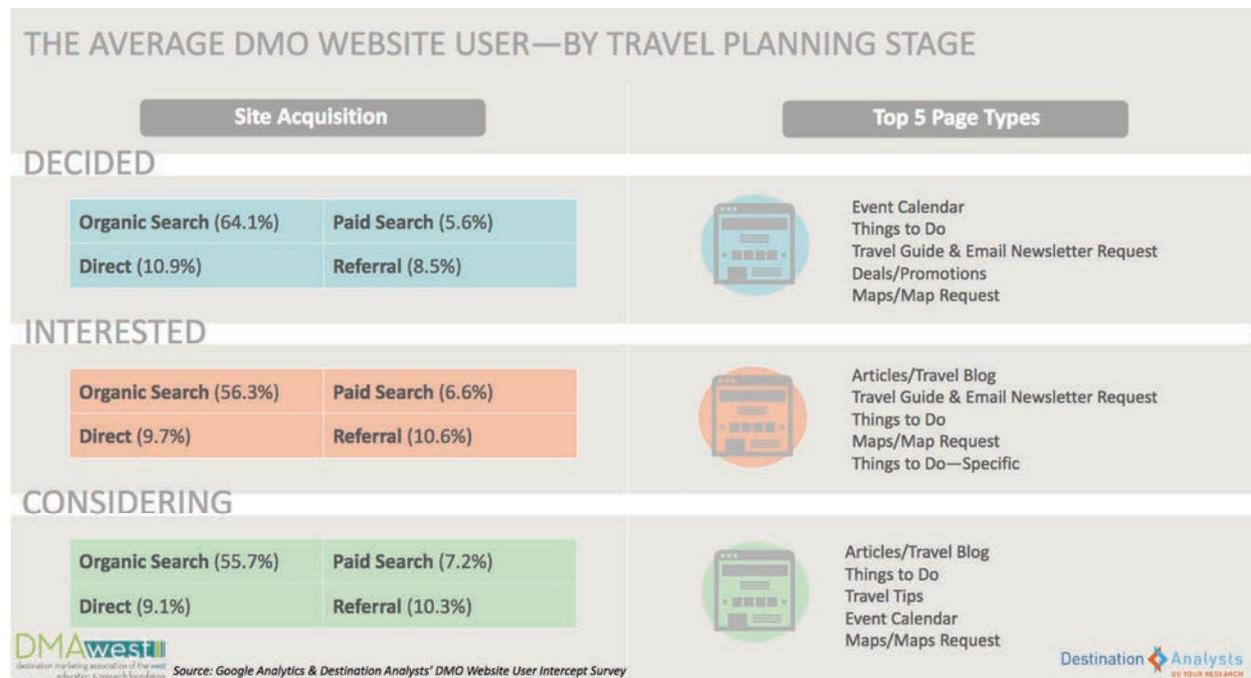
The following shows how a consumer used a DMO site during the trip planning process and what content was most important throughout the various stages, according to recent data from Destination Analyst and DMA West:

¹⁸ Why Travelers Aren't Using SMO Websites, CrowdRiff and Skift eBook, 2016

¹⁹ The Impact of DMO Websites: DMO Website User & Conversion Study, Destination Analysts

²⁰ DMO Websites: How to Capitalize on Digital Trends to Increase Economic Impact: Utrip, 2017

²¹ The Impact of DMO Websites: DMO Website User & Conversion Study, Destination Analysts



So what should a DMO site offer consumers?

- The site should not just promote well known attractions, but also the local favorites or hidden gems of the destination.
- The website should be visually striking – Augustine has found great success with implementation of Instagram feeds on a DMO homepage. Both visually captive and inspiring, the feed’s content easily connects with potential visitor, influencing the decision-making process.

NLT Tourism Development Plan Draft

- Websites shouldn't feel like directories. Beyond listing hotels, restaurants, attractions and other businesses, it's essential to capture site users with compelling stories and inspire them to visit.
- Content should serve niche audiences the content they're seeking.

Current State of the American Traveler

In an age of highly-publicized airline incidents, travel bans and tightened regulations, the American traveler is finding themselves in an interesting position. Recent studies focused on American Travelers show a slowdown in intent to travel, but a more focused approach to trips that are taken, with a thorough inspiration and research process taking place before making any decisions.

The travel industry will see an increase in travel among Millennial Families as the 9.5million Millennial Family households intend to spend 19% more on vacations over the next year and plan to travel 36% more than the year prior.²²

Domestic travel now represents 85% of American vacations, up 7 points from 2016, meaning 13.9 million more vacations were taken within in the country compared to internationally. Moreover, 40% of domestic travel is expected to be to new destinations, creating opportunity for DMOs to reach travelers earlier in the trip-planning process and influence the choice to travel to their city or region. Road trips are also on the rise, as 39% of U.S. leisure travel in 2016 included a road trip. This is up 17% year-over-year.²³

Attractions are becoming more influential during the consumer journey with 68% of American travelers taking vacations domestically claiming to have chosen attractions before taking the trip – they're not deciding once in-market, but it's part of the itinerary building process and plays into the ultimate decision about where to travel. Top-ranking attractions include more cultural and educational based experiences²⁴:

- Art and history museums – 65%
- Aquariums – 59%
- Science museums – 56%
- Theme parks – 55%

Key Takeaway for Destination Marketing Organizations

Personalized content and more focused segmentation will prove to acquire a higher ROI for those marketing destinations to potential visitors. Cross-device approach across multiple channels will help tourism brands reach qualified, interested audiences and reaching those groups early enough in the consumer journey will convert interested travelers into actual visitors.

Leisure Sales Trends

The largest change within the leisure sales community is the fast-growing pace of receptive tour operators and bed banks. Both have always been used, but as the receptive industry grows, the need for international companies

²² MMGY Global: 2017-2018 Portrait of American Travelers Study

²³ MMGY Global: 2017-2018 Portrait of American Travelers Study

²⁴ MMGY Global: 2017-2018 Portrait of American Travelers Study

NLT Tourism Development Plan Draft

to contract direct with hotels is decreasing. The largest adjustment in the receptive operator world is the merger of one of the top three largest receptive tour operators: HotelBeds, GTA and Tourico. Within the next year, the three companies will become one and you will see increased sales to our destination. Receptive Tour Operators are domestically based tour operators that specialize in the US market. Since the availability of properties and activities is much higher through a receptive operator, most large international tour operators choose to use their inventory instead of holding thousands of individual contracts.

Creative Strategy

Attract leisure travelers, meeting and event planners to North Lake Tahoe by creating and maintaining an emotional connection with each that goes above and beyond product offerings.

North Lake Tahoe Brand Pillars

Working together with the “human nature” approach, North Lake Tahoe’s brand pillars are the driving force behind all content, campaigns and strategic messages. These pillars include:

- Outdoor recreation, activities and adventure
- Health & Wellness
- Food, Culture & Dining
- Luxury
- Family and Multi-generational
- Meetings, Groups and Weddings
- Secret Seasons (Fall and Spring)

Campaign Platform: Human Nature

Human nature is a powerful force. It’s that innate sense of purpose that naturally draws us in, captivates us and is so instinctive to who we are that we can’t ignore it. North Lake Tahoe creates that kind of reaction – it’s breathtaking landscape, countless activities and all-season appeal make it a destination that is more than a place to visit; it’s part of who we are. North Lake Tahoe – It’s Human Nature

Campaign Elements

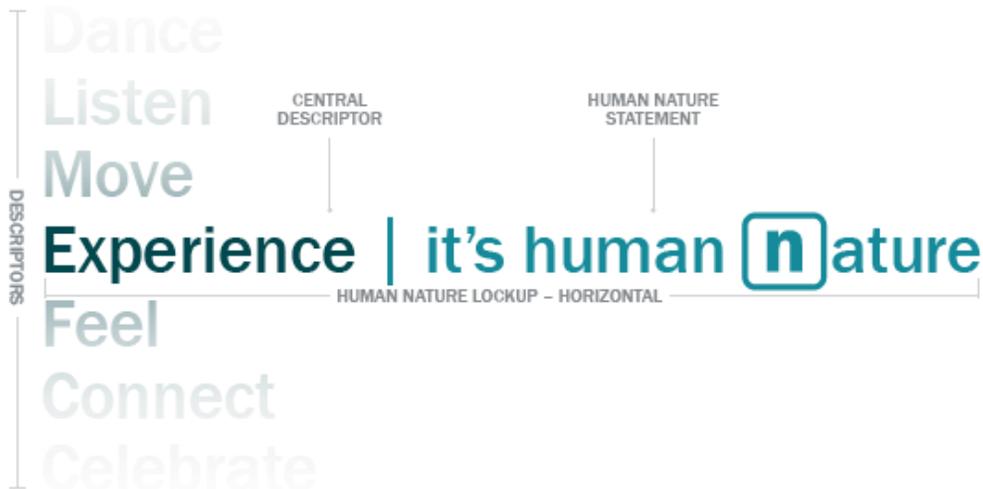
- Human Nature Lockup
The horizontal Human Nature lockup is the campaign standard, and should be used when possible, with the following rules applied. Space on either side of the line bar is equal to the width of the “n” in “nature”. Height of the line bar is equal to the interior of the square around the “n”. Stacked options can be used when there is a shortage of horizontal space.



- Descriptor Roller
The descriptor roller is an essential element of the Human Nature campaign and should appear whenever space allows. Ideally, each roller consists of seven descriptors that will vary according to audience and strategy. Colors are as follows: the Human Nature statement is in Alpine and the central descriptor is Ponderosa. The remaining descriptors fade into the background away from the center point. The gradient

NLT Tourism Development Plan Draft

overlay can be adjusted depending on the background image being used. Descriptor roller should always appear in the top left corner of photography, on clear space. The reversed descriptor roller has the same characteristics as the standard descriptor roller, with the exception of the color. See campaign guide for more information on approved colors on the reversed descriptor roller.



- Sierra Nevada
The ridge line of the Sierra Nevada is used as an anchor placed at the bottom of ads, overlaying chosen photography. The horizontal or stacked North Lake Tahoe logo is placed in the left-hand corner, or centered, depending on layout.
- Photography
Photography style for the Human Nature campaign is intended to encourage travelers to picture themselves in North Lake Tahoe. Photos must show at least one person (human element), and an activity. Use photos shot from behind when possible so the viewer feels like they are part of the scene. Photography should be specific to the season promoted in the application.

Target Audiences

Leisure Travel

Leisure travelers with a passion for the outdoors who can travel mid-week and during the off-season. In very broad terms, we can assume that all segments will tend to be outdoor enthusiasts, with a passion for some kind of outdoor activity and a commitment to living a full, active life. Travel decision makers will skew female. (80% of all travel decisions are made by women. 75% of those who take cultural, adventure or nature trips are women.²⁵)

Workaholics (Includes Millennials)

- Working professionals
- Age 25 - 49
- Higher Education
- Dual Income/No Kids
- Triggers
 - Burned out
 - Interested in weekend retreat
 - Mountain oasis is the answer
- Attitudinal
 - Spontaneous
 - Time away from work is precious
 - Want outdoor activities
 - Want minimal work to plan trip
 - Interested in food and accommodations
 - Likes adventure

Families

- Adults 35 - 54
- Higher Household Income
- Triggers
 - Family is first
 - Family fun
 - Seeking new, immersive experiences
 - Weekend or event escapes
 - Variety of activities
- Attitudinal
 - Likes adventures
 - Active
 - Drive to destinations
 - Travel frequently socially active
 - Protective: seeking safe options
 - Plans trips around school vacations

Outdoor Enthusiasts/Millennials

- Adults 18 - 34
- Healthy eating and exercise focused
- Triggers
 - Outdoors
 - Want great adventure
 - Hike, bike, run, water sports, ski/board
- Attitudinal
 - Want a challenge
 - GoPro
 - New hills to climb
- Attitudinal
 - Risk takers
 - Foodies

²⁵ Forbes

NLT Tourism Development Plan Draft

- Drive: hauls their own gear
- Good weather not crucial
- Spontaneous at times
- Participates with group
- Shares socially

Seasonal activity focuses

Fall

- Hikers
- Mountain bikers
- Kayakers
- Paddleboarders

Spring

- Sport-fishing enthusiasts
- Hikers
- Mountain bikers
- Paddle-boarding enthusiasts
- Kayakers
- Golfers
- Music/special event fans

Winter

- Downhill and cross-country skiers
- Snowboarders
- Sledding enthusiasts
- Skaters

Summer

- Hikers
- Mountain bikers
- Boaters/water sport enthusiasts (Kayakers, paddleboarders, etc.)
- River rafters
- Beach goers
- Music/special event fans

Convention and Group Travel

The group/meeting segment includes regional and national meeting (approximately 50% corporate, 50% association), event planners and tour operators looking for a unique California outdoor adventure destination that will align with their budget and attract maximum attendees.

Currently, California makes up roughly 60% of all convention and group business for North Lake Tahoe. There is targeted outreach for meetings and groups in Washington, D.C. and Chicago, as well as the South East, with a focus on Atlanta, given the sports market and flight availability in the region.

Meetings and groups are targeted with messaging about the multitude of group activities and team-building opportunities in North Lake Tahoe, specifically focusing on spring, summer and fall.

Paid Media Strategy

The paid media strategy will focus on efficient targeting while enhancing KPI's and opportunities for visitation. This will be done through:

- Seasonality fly/drive strategy
- Multi-vendor optimizations
- Paid social placements
- Website activity and geo-fencing

2017-18 Campaign Results

The spring 2017 campaign resulted in serving over 21 million impressions and driving 22K users to GoTahoeNorth.com. This resulted in more than 4.1K book now conversions for an average cost per conversion of \$32. Of the marketing tactics, animated display ads were responsible for the largest share of conversions (48%), followed closely by social media ads (46%). Social media ads also drove the lowest cost per conversion of any tactic (\$9), suggesting they provided the most overall value.

Overall, the summer 2017 campaign served a total of 14 million impressions, resulting in 17.7K website sessions and 6.5K book now conversions. This equated to a \$15 cost per conversion and \$4 cost per website visit. Social media ads were responsible for the largest share of book now conversions (61%) and in turn drove the lowest cost per conversion. Display ads followed with 32% of all conversions and the second lowest cost per conversion. Email and paid search ads, while driving less conversions than social media or digital ads, drove the highest quality web traffic. Users from these mediums spent the most time on the website and viewed the most pages per session.

The fall 2017 campaign resulted in serving over 8.6 million impressions and driving 21K users to GoTahoeNorth.com. The conversion metrics were shifted in September from “Book Now” conversions to “Time on Site (TOS)” conversions, where anyone who spends more than 115 seconds on the site is considered a conversion. Display ads, which included both banner and native ad types, served the largest share of digital impressions and drove the largest share of website traffic, while email and paid search ads were effective at driving high-quality website traffic at a low cost. Notably, email ads converted users at a cost of \$11 per conversion.

The winter 2017-18 campaign served a total of 48 million impressions, resulting in 56K website sessions and 14K time on site conversions. This equated to a \$22 cost per conversion. Notably, roughly 1 in 4 users spent more than 115 seconds on the website, which is the time on site conversion metric. With the mild winter, additional budget was allocated to the drive markets (San Francisco Bay Area and Sacramento) to increase immediate bookings for the lodging properties. Digital components like weather-triggered display ads were incorporated, along with digital outdoor billboards in the Bay Area and additional social media ads for that audience.

Paid Media Target Markets

The seasonal fly/drive market strategy will put the focus of shoulder seasons on drive markets (SF Bay Area/ Sacramento) and the peak seasons for fly markets. North Lake Tahoe's drive markets tend to see high visitation during peak season, leaving an opportunity to drive shoulder season activity. The fly markets require higher consumer spend and drive a consumer desire to a destination's optimal product consumption. As such, the drive

NLT Tourism Development Plan Draft

market strategy will focus on the San Francisco Bay Area and Sacramento while the fly market strategy will continue to focus on Los Angeles, New York and Austin, Texas as those markets still have capacity for growth. There is a need to be flexible in order to look at growth market opportunities with direct life into Reno Tahoe International Airport, such as the Pacific Northwest, per Visa Vue data spending and stakeholder interest.

Consumer Media Approach

The paid media strategy includes a media mix designed to engage audiences across a variety of platforms and mediums. Using this multi-platform, multi-device approach increases brand awareness and generates stronger results.

- Persona Targeting (based on Prizm, GfK MRI, Scarborough data)
- Work in more opportunities to reach Millennials – platform, content, visuals/creative
- Focus on quality of engagement with time on site metrics
- Location visitation vs. website activity
- Incorporate niche audience targeting for spring, summer and fall seasons
 - Hiking, mountain biking, kayaking, golf
 - Winter focus remains ski/board audience

Paid Media Tactics

Search Engine Marketing (SEM)

As travelers begin their hotel and get-away plans by turning to the internet to search for potential destinations, this should represent a strong component of the overall media plan.

- 70% begin researching online before deciding where or how they want to travel.
- 59% use search engines for travel ideas and information.
- 52% plan to spend more time researching vacation options online as a means of getting the best value for their dollar.

Search Strategy

- Target drive and fly markets according to season to maximize reach to core travel target.
 - Continue use of both branded and none branded key terms to build awareness of North Lake Tahoe brand in drive markets.
 - “Leisure traveler” keyword group to focus on standard keywords of the area as well as local hotels, dining, shopping, hiking and outdoor activities.
 - Measure click-through rates and optimize frequency to ensure maximum qualified traffic sent to the website.

Online Display Banners (Including Mobile)

Online Banner Strategy

Reach travelers while they are online investigating travel options and encourage them to consider the NLT as a destination. Use multiple vendors to compete on performance and optimize accordingly.

- Geo-target impressions based on fly and drive market seasonality strategy.
- Focus on partners that can properly market to each targeted persona.
- Behaviorally target impressions to reach a traveler by age, likelihood to travel, interest in cycling/ outdoors and propensity to visit North Lake Tahoe.
- Establish a strong presence in mobile as click-through rates for mobile banners are very high and deliver a large amount of traffic.

Paid Social Placements

Paid Social Strategy

Over 65% of all posts in social media consist of things people are ‘doing.’ Many of which are travel related. Additionally, over 25% of national banner ad placements are now in social media. Furthermore, paid social placements allow for further engagements beyond a traditional banner ad.

- We will use regular ads and carousel ads through timeline placements on both Facebook and Instagram.
- We will use click and reach optimizations to drive traffic to as many of our target audience as possible.
- Targeting options will include intent and interest based targeting to further messaging towards desired audience personas.

Retargeting

Only 2% of first time visitors continue through to conversion. Retargeting ensures the audience who was willing to visit your site is further nurtured along the buying cycle. Include retargeting to build frequency with visitors that have already visited GoTahoeNorth.com.

Retargeting Strategy

Utilize the ability to retarget users within Facebook. Continue to deliver message within user newsfeeds. Newsfeed banners often generate higher click-through rates.

Email Marketing

Email Marketing Strategy

Utilize email to reach key niche audiences

- Use double opt-in prospecting email lists
- Use applicable trade publication lists that further fit our target audiences

Key Performance Indicators

There will be additional tracking set up to further our KPI's to deeper conversion levels. These conversion levels will include:

- Time on site, to track performance and engagement
- Book now button on lodging page to track additional activity before partner site, while furthering lodging page KPI
- Annual return on advertising spend and intent to travel studies
- Tracking destination attribution by using cross device implementation to track visitation to NLT area.
 - Sunset Magazine, Ski Magazine, etc.

Owned Channel Strategy

Inspiration and Education

North Lake Tahoe's owned channels should lead with inspirational content that encourages target audiences to consider a trip, and educational content that gives them the tools to bring it to life.

North Lake Tahoe's owned channels offer content marketing opportunities to engage our audiences. By pairing strategic ongoing content to our blog and newsletter channels with content-driven campaigns, we can engage audiences at different levels of the micro-moments journey.

Blog Content

The North Lake Tahoe blog has evolved into a timely resource for visitors. In content development, real-time events and activities have been coupled with inspirational, pillar-based content to encourage investigation and trip planning by potential visitors at every phase of the travel lifecycle.

Based on content performance, two distinctive "styles" of blog posts will be the driving force behind all content:

1. Listicle Posts

North Lake Tahoe's audiences respond extremely well to listicle, or list-based content. Listicles pair concise blurbs with impressive visuals to hold the attention of audiences online and strategically showcase various pillars and themes.

2. Storytelling Posts

While listicles perform well with North Lake Tahoe's audiences, readers are also highly receptive to more in-depth, storytelling-based content. These posts take a deeper dive into one particular topic, connecting the topic at hand with individuals in North Lake Tahoe to provide a richer story. They also offer the perfect platform to tie the "Human Nature" mentality into owned channels.

Rich Visual Content

Today's traveler responds more meaningfully to stunning visuals than any other form of content. Rich visuals should be a driving force of North Lake Tahoe owned channels, including photos, video content, 360-degree content, interactive elements and others. North Lake Tahoe's visual assets will be leveraged for inclusion in owned channels whenever possible.

SEO

Impact - Blog content offers an opportunity for ongoing SEO growth, and topics will be strategically connected to goals on the technical end.

Frequency - New, original content should be developed and launched on North Lake Tahoe channels 2-3 times per month, allowing for audience engagement.

Consumer Newsletter

North Lake Tahoe's consumer newsletter is a lower-funnel tactic, engaging a database of users who have previously "opted-in" for content. To that end, it should provide meaningful, educational and seasonal information that encourages a potential visitor to consider booking their upcoming trip.

NLT Tourism Development Plan Draft

Visually, the newsletter will continue to evolve, incorporating rich media whenever possible and shifting with relevant trends in the destination space.

Frequency - Newsletters will be distributed to audiences 1-2 times per month, allowing for quality engagement without over-saturating our audiences.

Content-Driven Campaigns

North Lake Tahoe's commitment to content marketing campaigns has set the brand apart from other destination, engaging audiences in completely unique ways. Over Fiscal Years 2018/19 and 2019/20, a few content campaigns will assist with providing inspirational and educational content to audiences, engaging them at many different levels.

1. Evolution of Local Luminaries

Timing: Ongoing, FY 2018/19

NorthLake Tahoe's well-established Local Luminaries campaign offers ways for ongoing promotion, leveraging current assets for future campaign extensions.

From a high level, North Lake Tahoe will begin a strategic transition of luminaries as "ambassadors" to "guides." Now that each luminary has been established and introduced to align with North Lake Tahoe's individual pillars, the opportunity lies in leveraging these experts as guides for their broader "theme." This will expand the campaign's focus to incorporate North Lake Tahoe's many facets, and will allow the luminaries campaign to live on for upcoming years.

A few examples of execution include:

- Monthly thematic focal points, tying into one greater pillar each month
- Micro-videos utilizing pre-shot Luminaries content for short visual experiences
- Content series using the Luminary to introduce audiences to the greater theme
- Social campaigns tying into each greater theme

2. "Hidden Tahoe" Campaign

Timing: Sept 2018 - Mar 2019

In today's digital age, everyone has access to any and all information at their fingertips. Travelers are obsessed with getting a secret or "behind-the-scenes" experience out of their trips, and are always intrigued by finding out lesser-known aspects of a destination.

The "Hidden Tahoe" or "Tahoe's Secrets" campaign will tie in these lesser-known destination experiences and features to owned content channels, shedding light on new types of experiences in North Lake Tahoe. From a strategic level, this campaign will be structured to promote our "Secret Seasons" (fall and spring), with "secrets" built around these timeframes, specifically.

Some initial tactical executions for the "Hidden Tahoe" campaign include:

- Social media videos using copy-overlay style to share the "secrets" hidden around the lake
- Blog and newsletter content series to take a deeper dive into these secrets

NLT Tourism Development Plan Draft

- Influencer activations to experience each “secret,” bringing their real experiences to the forefront of the campaign

3. “Tahoe Trek” Campaign

Timing: FY 2019/20

In order to better provide visitors with a sense of “understanding” for the various communities in North Lake Tahoe, the “Tahoe Trek” campaign will provide a trek around the lake, taking a deep dive into each individual community. While this campaign will be more specifically defined in initial planning phases, a high-level overview includes:

- Highlight unique elements within each community and region of North Lake Tahoe
- Video road trip guide taking users through each community
- Use videos and blog content to highlight key events and points of interest in each community
- Roll-out campaign with a one-month “takeover” for each community
- Influencer partnerships to bring explorations of each community to life, even potentially featuring influencers in video content
- Greater “North Lake Tahoe Trek” map or road trip guide to tie all communities together

Earned Channel Strategy

Public Relations

North Lake Tahoe’s public relations efforts have provided exceptional coverage for the brand within its target markets, key timeframes and pillars. Additionally, supporting and/or supplementing partner efforts by focusing on the destination markets, while supporting a regional focus around events and during times of need has been identified as a key focus area going forward.

Tactics for public relations executions include:

- Unique, per-publication pitching for local, regional, national and international publications
- Long-lead outreach for significant coverage
- Seasonal “What’s New” press releases
- Media desk-side visits in key geographic markets
- Familiarization tours with key domestic and international media
- Content submission and partnered familiarization tours with Visit California and TravelNevada
- Crisis Communications efforts, as needed

As the public relations program has evolved, North Lake Tahoe should implement some strategic shifts, including the following.

High Season vs. Shoulder Season

The majority of North Lake Tahoe's proactive public relations outreach should fall around shoulder seasons and the introduction of the brand as a "year-round destination."

- North Lake Tahoe should aim to host most of its journalists during shoulder seasons, blocking out summer and winter as "high seasons." If any journalist is under consideration for a high-season familiarization tour, vetting should be much more strict.
- Two group familiarization tours should be executed annually, one in fall and one in spring, to align with North Lake Tahoe's key pillars and shoulder seasons. In addition, a few individual familiarization tours should be executed during these timeframes.

Familiarization Strategy

For all visiting journalists to North Lake Tahoe, trips should provide a cohesive experience of the lake, making sure a journalist gets:

- On the lake
- Above the lake
- Immersed in culture

Targeting TV

As North Lake Tahoe's brand becomes more prevalent nationally, it should up-level its PR efforts to begin targeting key television features within its PR program. Shows like the Booze Traveler, Big Crazy Family Adventure, and others can provide national exposure for North Lake Tahoe with a different caliber of coverage than print or digital features, and securing one large-scale TV feature annually will create a huge impact.

Crisis Communication

As with any destination, North Lake Tahoe must be prepared for natural crises throughout the year. For the public relations side of efforts, a proactive, high-level crisis plan should be drafted at the beginning of each fiscal year and ready to go into effect at any time as needed. These proactive plans should cover snow for winter and fire for summer.

Snow Communications

Annually, North Lake Tahoe must be prepared to provide public relations initiatives around snow messaging, and in Fiscal Years 2018 - 2020, a proactive approach should be put into place. Rather than reactive pitching around snow totals from partners, the brand should take a higher level approach, including the following:

- Creating an annual list of winter story angles
- Pitching winter story angles proactively as long leads ahead of winter
- Weaving snow totals and conditions into winter story angles as necessary

NLT Tourism Development Plan Draft

In addition, a crisis communications timeline should be developed prior to winter to prepare for low-snow seasons. This crisis communications piece can assist North Lake Tahoe in identifying timelines to kick PR outreach into higher gear to support partners and the region with reactive messaging, and additional tactics:

- Weekly partner conditions calls
- Regional talking points and messaging ideas
- Partner summits for talking points and messaging
- Winter regional FAM visits, targeting drive market
- Weekly conditions pitches

Shared & Social Channels

Social Media

Social Media encompasses all social channels and influencer partnerships for North Lake Tahoe, and offers the opportunity for quick, reactive posting and strategic shifts.

North Lake Tahoe's social media presence and influence has exploded over the past few years, due to its ability to react to key changes in the social media space. As the brand continues to grow, it should keep this nimble approach to social media.

Per-Channel Approach

Each social media channel offers different benefits, and North Lake Tahoe has established varying strategies for each one.

Facebook

With North Lake Tahoe's largest social audience, Facebook will remain a key player in the brand's social strategy, but approach will continue to evolve to include:

- Engagement-centric content, aiming to drive comments from audiences
- Real-time content to showcase conditions and harness "Facebook Live" functionality
- Video and campaign-centric content rolled out in creative ways

Instagram

Instagram has become a heavy hitter for destination social media marketing, and North Lake Tahoe must continue to focus on growth of this channel to remain competitive. New strategic opportunities include:

- Hyper-specific editorial calendar for intentional, grid-centric posting
- Regular Instagram Stories to engage audiences in real-time, and build-out of story highlights
- Partnerships with Influencers and Niche Pages to extend brand reach

Twitter

Twitter can continue to act as North Lake Tahoe's real-time social media, highlighting a few key elements:

NLT Tourism Development Plan Draft

- Regular weather updates
- Event features
- Visual, eye-catching content

Pinterest

North Lake Tahoe's Pinterest should both inspire and leverage owned content, with the following tactics:

- Publishing owned blogs
- Inspirational visual destination content
- Special focus on wedding content

YouTube

North Lake Tahoe's YouTube channel will remain as an opportunity to leverage video content as it becomes available.

Across all social media efforts, some larger-scale strategies for implementation include the following.

Photography

While North Lake Tahoe has made great strides in up leveling its owned photography assets, moving forward, each photo shoot should incorporate a social media element. The way photography is developed for social media is extremely different than development for commercial or advertising use, and demands a more authentic, artistic aesthetic. This should be considered and incorporated into shot lists for any upcoming photography efforts.

Influencers and Niche Pages

With the rise of Instagram and authentic, real-person-centric content, North Lake Tahoe will leverage opportunities with both influencers, individuals who have risen to "social celebrity" status, and niche pages, accounts with niche topics that have a huge following. These will be worked into the ongoing social strategy in a few key ways:

- Niche pages will be engaged and provided photography monthly to align with key pillars. A nominal monthly budget will be allocated to engaging these niche pages for content re-posts.
- Two large-scale national influencer familiarization tours will be executed annually during secret seasons to incorporate North Lake Tahoe's key pillars and engage with its individual geographic markets.
- As needed, regional influencers will be tapped into to showcase real-time conditions in the region. This reactionary influencer effort will be built in as opportunities within crisis communication plans.

Contests and Giveaways

Social media contests and giveaways have been incorporated on a regular basis into North Lake Tahoe's social media strategy. This approach should continue, but the manner in which contests and giveaways are executed should be evolved to include new opportunities, including:

- Partnered giveaways with influencers

NLT Tourism Development Plan Draft

- Giveaways within Instagram stories
- Photo contests that engage visitors more so than locals

Real-Time Content

As social media evolves, audiences have come to expect branded social content in real-time. North Lake Tahoe must continue to include real-time content through channels, tapping into Instagram Stories, Facebook Lives.

Leisure Sales Strategy

Past Results

Marketing Cooperative Results

- 2017 was the largest years of participating in marketing co-cooperatives. Not all have a tracking mechanism, for example, NLT bought into a ski.com newsletter with our partners, it is difficult to link sales to that one newsletter, but the marketing efforts support our destination, our partners and ultimately aid in the education of our product.
- Expedia: Direct to consumer project that launched in February 2018 and is currently on-going. Expedia matched our dollar amount 1:1 and we are currently at a 21:1 ROY for all fly markets, generating over \$127,000 in first four weeks.
- South Korea Visit California Winter Olympics Sales & Marketing Push: Launched in January 2018 around the 2018 Winter Olympics. We partnered with Squaw Valley on this project to share costs. Some outcomes from this project are:
 - BH Lee Content Series:
 - Total Impressions: 2,587,623
 - Total Reach: 1,503,717
 - Total Views: 578,287
 - Total Engagements: 1,912

Increased Product Success Stories

- | | |
|--|---|
| <ul style="list-style-type: none">▪ HotelBeds:<ul style="list-style-type: none">- (2) hotels in 2015 to (7) hotels in 2017- 250% increase▪ GTA:<ul style="list-style-type: none">- (1) hotel in 2015 to (3) hotels in 2017- 200% increase | <ul style="list-style-type: none">▪ Tourico:<ul style="list-style-type: none">- (1) hotel in 2015 to (3) in 2017- 200% increase▪ Bonotel:<ul style="list-style-type: none">- (2) hotels in 2015 to (5) hotels in 2017- 150% increase |
|--|---|

Success Stories

- Increased brochure placement 2016-2017 by 89.6% and increased product placement by 29.2%
- Hosted 16 travel trade and 12 international media FAMs, generating over \$1.5 million in PR value
- Hosted 24 site inspections
- Launched new travel trade industry website
- Sent out 339 travel trade leads
- Increased travel trade newsletter database by 127% History

NLT Tourism Development Plan Draft

The Leisure Sales department for North Lake Tahoe is designed to increase visitation to the region through the following channels: Direct to Consumer, Tour Operators and Travel Agents. In addition to these channels, the department oversees the international media and marketing efforts. By utilizing these channels, the goals of the department were and still are to strengthen relationships with international offices, to monitor brochure information, to increase brochure placement, and to increase mid-week visitation.

In the past, an emphasis was placed on increasing winter product and sales. Historically, it was more common for the international tour operators to contract directly with hotels. As the industry has moved towards the use of receptive operators, our strategy is aligning with that switch. The international market has been and will continue to be a key focus of the department. In the past, the two primary international markets the department focused on were the United Kingdom and Australia, holding contracts with outside representation in bot for over ten years. We still hold contracts with both of these countries but have expanded their scope of work to include the countries of Ireland and New Zealand. In addition, these are no longer primarily winter, but instead year-round focused.

Strategy Moving Forward

The Leisure Sales department for North Lake Tahoe is designed to increase visitation to the region through the following channels: Direct to Consumer, Tour Operators and Travel Agents. In addition to these channels, the department oversees the international media and marketing efforts. By utilizing these channels, the goals of the department were and still are to strengthen relationships with international offices, to monitor brochure information, to increase brochure placement, and to increase mid-week visitation.

In the past, an emphasis was placed on increasing winter product and sales. Historically, it was more common for the international tour operators to contract directly with hotels. As the industry has moved towards the use of receptive operators, our strategy is aligning with that switch. The international market has been and will continue to be a key focus of the department. In the past, the two primary international markets the department focused on were the United Kingdom and Australia, holding contracts with outside representation in bot for over ten years. We still hold contracts with both of these countries but have expanded their scope of work to include the countries of Ireland and New Zealand. In addition, these are no longer primarily winter, but instead year-round focused.

Primary strategy moving forward is simple: increase product placement.

- This includes hotel, both large and small, and activity product. Without product, you cannot increase sales and TOT into the destination.
- The goal is to increase as much product in each of the largest receptive operators and then move to more individualized and focused tour operators.

Creating content in other languages - this includes video assets, itineraries, informational one sheets, vacation planners

The second strategy is to continue the development of our international markets. We saw a 19.7% increase from 2016 and this is largely due to dedication in specific international markets, international representation and sales pushes.

NLT Tourism Development Plan Draft

- VisaVue data, captured since 2015, has provided us with a snapshot of North Lake Tahoe's Tier 1 and Tier 2 International and Domestic markets.
 - Our tier 1 markets include, United Kingdom, Australia, Mexico and Canada.
 - Our tier 2 markets include emerging markets, such as India and China, but as we track our data, we will include France and Germany into this category.
 - These countries will receive priority when opportunities in the following areas arise: travel trade FAMS, international media FAMS, travel trade marketing co-operatives and identifying both international and domestic sales calls and missions.

Build on our partnerships, with our local shareholders, local DMO relationships and state- wide DMO partnerships.

Create a more efficient trade show schedule and prioritize FAMS that align with our international targets

- Start rotating tradeshows that focus on additional markets and start alternating years of our attendance.
- Be more selective with the countries and FAMS that we host, keeping the focus to tier 1 and tier 2 markets, allowing staff to focus on the bigger strategy instead of hosting groups.

Key Performance Indicators

- Number of FAMS
- ROI on marketing cooperatives and OTA projects
- Product placement with our receptive tour operators and brochure placement with our international and domestic tour operators

Conference Sales Strategy

Past Results

After record breaking years for bookings and revenue in FY years 15/16 and 16/17 the conference sales department began to see a decline in both metrics looking forward in to future fiscal years. However, strategies have been implemented help counter that decline and have already seen an increase in leads generated.

2016-2017 Fiscal Year

- 244 Leads
- 82,016 Lead room nights
- 53 Bookings
- 11,587 Booked room nights
- Booked attendee spending: \$1,943,874

2017-2018 Fiscal Year (to Date)

- 446 Leads
- 72,729 Lead room nights
- 40 Bookings
- 9,561 Booked room nights
- Booked attendee spending: \$1,690,320

Strategy Moving Forward

Core Strategies

Develop a robust conference sales team with a diverse schedule of events to increase the awareness of North Lake Tahoe as a meetings, conferences and conventions destination within the state of California and the entire nation.

1. Focusing sales and marketing efforts in California which historically generates roughly 70% of conference bookings. Primarily in Northern California but with significant efforts in southern California as well.
2. Focusing sales and marketing efforts in cities with significant air lift in to Reno/Tahoe International Airport. Those destinations include San Francisco, Los Angeles, Portland, Dallas and Phoenix.
3. Focusing efforts in Washington DC and Chicago where the majority of national associations are headquartered.
4. Improve group/conference/meetings presence on GoTahoeNorth.com. Expand content, include user-generated (testimonials, planner tips, blogs etc.), include downloadable planner tool-kit to help boost meeting/event attendance.

Tactics

- Partnerships
 - Continue strategic partnerships with HelmsBriscoe & Hospitality Performance Network (HPN)
 - Generate additional strategic partnerships with third parties such as HelmsBriscoe and HPN
 - Leverage partnership with Reno Sparks Convention and Visitors Authority (RSCVA) by attending trade shows in the Reno Tahoe booth, hosting joint customer events in strategic markets and maintaining communication with RSCVA sales staff to discuss potential groups

NLT Tourism Development Plan Draft

- Trade Shows
 - Evaluate large, national trade shows on an annual basis to determine if they produce the results expected
 - Focus on smaller, regional, appointment-based shows where North Lake Tahoe typically sees better production
- Client Events
 - Host 4 customer events in strategic markets (Sacramento, San Francisco Bay Area)
- Marketing
 - Create a destination video specific to the meetings industry that is :30-seconds to one minute, focusing on the meetings and conventions market
- Other
 - Increase responsibilities of Chicago sales representation to double the number of in-market client events (from one to two) and increase monthly sales calls to 10
 - Have conference sales staff join meeting industry boards and/or committees, such as CalSAE boards and committees or MPI Northern California Chapter
 - Create a Client Advisory Board (CAB) for the conference sales department, consisting of a representative group of professional meeting planners and industry leaders intended to be a catalyst for the creation of market-centric, client-focused ideas with the intent of generating additional group bookings.
 - Develop evergreen group/meeting-focused collateral for tradeshow, mailers, etc.
 - Develop quarterly email campaigns to highly-targeted, double-opt in lists, publications lists, etc. to maintain ongoing communication with planners so that North Lake Tahoe is top-of-mind when destination selections are being made

Key Performance Indicators

- Number of bookings
- Number of leads

Events Strategy

Past Results: 2016/2017 Fiscal Year

The NLTRA's return on investment from sponsorships allocated during the 2016/2017 fiscal year was 26:1. This was based on the estimated economic impact vs. the sponsorship dollars awarded and ancillary costs associated with sponsoring the event.

Events sponsored by the NLTRA generated an estimated \$10M+ in economic impact to the local economy.

Events sponsored by the NLTRA drew over 60,000 participants to the region.

NLTRA sponsored 24 events in the 2016/2017 fiscal year. It included events that aligned with broader consumer messaging including human-powered sports, culture, culinary, and health & wellness.

- Human Powered Sports
 - Spartan World Championships
 - AMGEN Tour of California
 - Broken Arrow Skyrace
 - Tahoe Vista Paddlefish
 - Big Blue Adventure Races
- Culinary
 - Lake Tahoe Autumn Food & Wine Festival
 - Tahoe City Wine Walk
- Health & Wellness
 - Wanderlust Yoga Festival
 - No Barriers Summit
- Culture
 - WinterWonderGrass Tahoe
 - Lake Tahoe Dance Collective
 - Lake Tahoe Music Festival

NLTRA sponsored the 2017 AMGEN Tour of California road bike race in conjunction with South Lake Tahoe. The PR results realized from the partnership were a win for the entire region.

- \$1.6M earned media value (+130% from 2016)
- Global broadcast audience of 16.6 viewers (+47% from 2016)
- 5.89 billion online, print and broadcast media impressions (+9% from 2016)
- 5,920 stories secured including the following outlets: USA Today, Wall St. Journal, Associated Press, ESPN, Los Angeles Times, New York Times, Yahoo! Sports, San Francisco Chronicle, Fox Sports, Reuters and more
- Facebook, Twitter and Instagram achieved over 85M total reach (+186% from 2016)
- Tour of CA website traffic 2.4M page views/1.15M sessions (June 2016 - May 2017)

Strategy Moving Forward

The NLTRA currently utilizes funds to support regional events for a number of purposes:

- Drive overnight visitation
- Enhance visitation in “strike” zone periods – seasonal, mid-week, regional (lake vs. mountain resorts)
- Capitalize on events that provide a marketing and/or PR reach to NLT targeted audiences
- Enhance the NLT brand by aligning events with target audiences and brand pillars

These funds typically come from two budget line items – Special Event Marketing Sponsorships and/or Special Event Partnership Funding. Each is targeted to different types of events however the overall goal is the same – drive overnight visitation and build brand awareness for the North Lake Tahoe region.

Marketing Sponsorships

Policy and Qualification Guidelines

NLTRA dedicates funds to provide cash sponsorships and in-kind support through the North Lake Tahoe advertising and PR channels.

To qualify, events are evaluated on the following criteria:

- Number of room nights generated – greater than 100
- Average night stay – at least/greater than 2.5
- Media/PR value – great than \$25,000
- Target audience and messaging – alignment within NLT consumer brand pillars and create a diversified portfolio of events in the NLT region – goal to have at least 2/category
 - Human Powered Sports
 - Cultural
 - Culinary
 - Health & Wellness
- Quality of event and producer experience
- Built-in audience capabilities

Funding

NLTRA will review each sponsorship on an annual basis to ensure a continued sponsorship is beneficial to the region. NLTRA reserves the right to continue, cancel or alter sponsorships at any time in adherence with the current event contract.

A general guideline of funding for a successful events are as follows:

- Years 1 – 3: 100% of original funding
- Years 4 – 5: 75% of original funding

NLT Tourism Development Plan Draft

- Years 6 – 7: 50% of original funding

Incubator Funding

Startup events will be directed through the Partnership Funding program for the first year if they can't confidently qualify for a Marketing Sponsorships. However, if after year one, NLTRA Staff and the BOD feel the event has a great deal of potential but still does not qualify for the Marketing Sponsorships, incubator funding can be utilized to support the event on a greater level.

This funding is also intended to be used to attract promoters of other successful events to replicate events in the NLT region.

Reserve Funding

Staff would like to explore creating an Event Reserve to cover multi-year event contracts. Currently the Marketing Reserve is relied upon in the case of reduced future funding.

Partnership Funding

The Partnership Funding program currently provides \$50,000 in cash funds specifically earmarked for marketing purposes to regional events that generate overnight visitation to Placer County. The program is intended for smaller-scale events that don't qualify for Marketing Sponsorships. Funds are allocated through an application process that was revised in 2017. In addition to funding, NLTRA staff provides consulting advise to event producers.

It is proposed that in the 18.19 fiscal year, the \$50,000 be used to supply in-kind support versus a cash sponsorship. NLTRA staff would work with agencies to create social, digital and PR ads/content to advertise the selected events. Event producers would work with staff and agency contacts to determine appropriate audience and markets.

Visitor Services/Experience Funding

The NLTRA will review certain regional events and consider funding with the intention of providing visitors services and experiences expected of the region. For example, the NLTRA sponsors the Tahoe City and Kings Beach 4th of July fireworks shows to ensure their continuation.

Create a Presence at Out-of-Market Events

A portion of the event marketing budget will be allocated to have a presence at out-of-market events. Staff will leverage current Marketing Sponsorship partnerships first to secure booth space at targeted events and then explore other event options as necessary. The goal will be to bring an experiential marketing presence to at least two events per year, located in target markets that aligning with consumer brand pillars. When appropriate, NLTRA will invite partners to attend as well.

Industry Partnerships

Through partnerships North Lake Tahoe is able to extend budgets, reach and brand awareness into the national and global travel marketplace.

- Promotion Partners
 - Visit California
 - Travel Nevada
 - Reno Sparks Convention and Visitors Authority
 - Reno Tahoe Territories
 - High Sierra Visitors Council
 - Brand USA
 - Reno Air Service Corporation
 - Lake Tahoe Visitors Authority
 - Incline Village Crystal Bay Visitors Bureau
- In-Destination Partners
 - Placer County
 - North Tahoe Business Association
 - Incline Village Crystal Bay Business Association
 - West Shore Business Association
 - North Lake Tahoe Chamber of Commerce
 - Tahoe City Downtown Association
 - Truckee Chamber
- Advocacy and Training Partners
 - Tahoe Prosperity Center
 - Mountain Housing Council
 - U.S Travel
 - Tahoe Fund
 - Take Care Tahoe

Measurement Approach

A major focus area going forward will be ongoing measurement. Metrics derived from research results will be used to evaluate ad effectiveness/ROI, visitor profile studies, lodging occupancy data, target markets and visitation.

- Research Measurement Schedule
- Ad Effectiveness/ROI – Annually
- Visitor Profile – Every Two Years
- Visitor Volume – Every Two Years
- Lodging Data – Throughout fiscal year
- Target Markets(Visa Vue Expenditure Data) – Throughout fiscal year

Specific department measurements are as follows:

- Number of Bookings
- Number of Leads
- PR Ad Equivalency
- Number of FAMS
- Time on Site
- ROY on marketing cooperatives and OTA projects (relatively new)
- Product placement with our receptive tour operators and brochure placement with our international and domestic tour operators.

Budget Breakdown

FY 2017/18 Annual North Lake Tahoe Marketing Cooperative Budget

Revenue Sources

NLTRA	\$1,411,821
IVCBVB	\$930,000

TOTAL **\$2,341,821**



Expenses

Cooperative Direct Expenses

Public Relations/Social Media	\$300,012
Leisure Sales	\$215,000
Conference Sales	\$250,600
Website Content Management	\$45,000
Website Maintenance	\$20,000
Consumer Marketing	\$1,160,150

Cooperative Program Expenses

Region Cooperative Opportunity	\$90,000
--------------------------------	----------

NLT Tourism Development Plan Draft

Regional Air Service Committee	\$100,000
DestiMetrics	\$35,000
CRM Subscription	\$10,000
VisitingLakeTahoe.com	\$36,000
Opportunistic/Content Campaigns	\$31,809
Fulfillment	\$10,000
Miscellaneous	\$13,250
Cooperative Event Sponsorship	\$25,000

TOTAL **\$2,341,821**

Appendix

Competitive Analysis

Mammoth Lakes



DMO Overview

Mammoth Lakes Tourism is a not-for-profit Destination Marketing Organization (DMO) that promotes and markets Mammoth Lakes through traditional and digital media channels, trade shows and by connecting with international wholesalers.

- The Mammoth Lakes Tourism Business Improvement District (TBID) is a benefit assessment district developed to help fund marketing and sales promotion efforts for Mammoth Lakes tourism businesses.
- Due to the success of the TBID, the organization's contract has been renewed for another 10 years, with the term beginning on September 1, 2018 and running through 2028.
- The total TBID annual budget for each year is currently projected to be approximately \$5,000,000 annually, or \$50,000,000 through 2028. This amount may fluctuate depending upon revenue generated by participating businesses.



Destination Drivers

- Mammoth Mountain: The highest peak elevation of any California ski area (11,053 feet) and an average of more than 400 inches of snowfall each year. An Olympic-size, 22-foot-tall half-pipe, one of only a handful in the country
- Outdoor Recreation: Mountain biking, hiking in nearby Ansel Adams Wilderness, golf, hiking, camping, climbing, running and road cycling
- Attractions: Mammoth Mountain, Devils Postpile National Monument, Yosemite National Park and Mono Lake
- Events: The summer event schedule includes concerts, food & wine events, and art festivals



Visitor Profile

- Most visitors are between the ages of 25-34 (26%) and 35-44 (19%) and the majority have a household income of \$75,000+
- Just 29% of Mammoth Lakes visitors have children under 18 in the household, and for those traveling with children, the average number of children per travel party is 2.63

NLT Tourism Development Plan Draft

- 36% of visitors come during the summer, 35% during the winter, 17% during the spring and 12% during the fall. (Though visitor volume during winter and summer is nearly identical, visitors during the winter season have the largest travel party size, longest length of stay and thus spent the most during their trip to Mammoth Lakes.)

Target Markets

- Most visitors to Mammoth Lakes live in California (67%) followed by 5% from the state of Nevada
- Of those who reside in California, 39% live in Southern California, primarily within the Los Angeles DMA
- Mammoth Lakes is primarily a drive market:
 - 81% of visitors drove from other parts of California and 9% drove from out of state
 - Only 4% of visitors flew into Mammoth Yosemite Airport. (Mammoth Yosemite Airport is served by year-round flight service from Los Angeles and winter seasonal service from San Francisco, San Diego, Las Vegas and Denver)
 - 6% of visitors flew into other destinations (Los Angeles, San Diego, Reno and Las Vegas) prior to driving to Mammoth Lakes

Marketing Initiatives for 2018-2028

- Internet marketing efforts to increase awareness and optimize internet presence to drive tourism and commerce at assessed businesses
- Print ads in magazines and newspapers, TV ads, and radio ads targeted to potential visitors to drive tourism and commerce at assessed businesses
- Development of tourism-related infrastructure designed to increase visitation and create or enhance a visitor experience that will encourage repeat visits to assessed businesses
- Media relations and communications to drive tourism and commerce at assessed businesses
- Sales blitzes to promote assessed businesses
- Familiarization tours
- Collateral material developments
- Attendance of professional industry conferences and affiliation events to promote assessed businesses
- Lead generation activities designed to attract tourists and group events
- Education of tourism business management and Mammoth Lakes Tourism on marketing strategies best suited to meet the needs of assessed businesses in Mammoth Lakes

Summit County, CO



Summit County does not have a county wide destination marketing organization. Marketing is handled by the individual towns and ski resorts.

Destination Overview

Three of the top 10 most-visited resorts are located in lofty Summit County, Colorado. At 3,148 acres, with four major ski resorts—Breckenridge, Keystone, Copper Mountain and Arapahoe Basin—and two reservoirs—Lake Dillon and Green Mountain Reservoir—Summit County draws visitors from all over the world.

- Breckenridge, Frisco, Silverthorne, Dillon and Keystone are only an hour and a half from Denver International Airport
- Keystone is the largest resort in the county. (the others: No. 2 Breckenridge and No. 9 Copper Mountain).
 - It's also the only one—and one of the few in the state—where the lifts keep turning after the sun goes down, with nine night-skiing trails open beneath the lights on selected evenings throughout the season
- Opportunities for outdoor recreation include hiking, biking, fishing, backpacking and kayaking in the summer and skiing, snowmobiling and ice climbing in the winter.
- The county also offers nationally-registered historical sites, year-round family holiday events, summer farmers' markets, art festivals and annual events such as the Breckenridge Music Festival
- Colorado's ski towns saw a slight decrease in visitation during the 2016-17 year, compared to record numbers in 2015-16.
- Snow-focused visits accounted for more than 13 million visits and contributed to record sales-tax revenue for the state.
- The future looks bright as bookings for the coming winter are up year-over-year.



Destination Drivers

- Breckenridge: Breckenridge’s selling points include a lively, historic downtown, North America’s highest-elevation chairlift (the 12,840-foot Imperial Express SuperChair) and 2,358 acres spanning five mountains.
 - What sets Breckenridge apart is the town itself: its main street exudes frontier charm, with brick storefronts, microbreweries, galleries and one-of-a-kind boutiques
- Copper’s 2,465 acres of naturally divided terrain offer something for everyone, from beginner-friendly slopes on the mountain’s west side to experts-only on the east. Olympic-caliber skiers use the U.S. Ski Team Speed Center at Copper for early-season training, while pro snowboarders learn to nail tricks at Woodward at Copper, a practice facility where foam pits soften harsh landings.
- Woodward at Copper: Like Truckee, Copper has a Woodward indoor training facility offering snowboard, ski, skateboard, and digital media programs along with a 19,400 square foot indoor playground with artificial jumps into foam pits, jib lines, skate bowls and mini ramps, foam pits, spotting belts, and Olympic fly-bed trampolines.

Visitor Profile

- Demographics for Colorado ski vacationers:
 - Strong male skew
 - Older than the national ski norm
 - Above average income and education
 - Have above average interest in culinary experiences
 - Averaged 4.4 nights away from home
- Skiers are Colorado’s most valuable visitors—spending more than \$300 per skier visit and more than 8.4 million nights in lodging accommodations
- The top out-of-state markets for overnight Colorado vacations are:
 - California
 - Texas
 - Illinois
 - Florida
 - New York
 - Arizona
 - New Mexico



Park City

DMO Overview

The Park City Chamber of Commerce | Convention & Visitors Bureau's mission is to promote Park City and Summit County as an historic, year-round mountain resort community with an ongoing Olympic legacy. Park City is a 35-minute ride from Salt Lake City International Airport and sits at about 7,000 feet above sea level in the Wasatch Mountains of Utah



- Home of the U.S. Ski and Snowboard Association (USSA), the parent organization of the U.S. Ski Team, U.S. Snowboarding and U.S. Freeskiing.
- The city's free local bus system makes it very easy for visitors to get around the destination without a car. Daily bus service is available to the ski resorts, local lodging and downtown Park City
- Named the top family resort by SKI Magazine in 2016, Park City caters to kids with low student-to-instructor ski school ratios, a nearly 4,000-foot alpine coaster, and a two-person zipline.

Annual Marketing Budget for 2017-2018

Annual Marketing Campaigns:	\$4,172,349
Special Events:	\$550,813
International:	\$535,250
Communications:	\$331,100
Group Sales:	\$560,000

Total: \$6,149,512

Visitor Profile

- Winter overnight visitor:
 - 61% male, 39% female
 - Average age: 43.8
 - Repeat visitation 77%
 - Average length of stay: 6.7 nights
 - HHI: \$200,000+
 - State of residence: California 9.5%, New York, 6.5%, Florida 6.5%, Texas 5.0%, International 8.6%
- Summer overnight visitor:
 - 52% male, 48% female



NLT Tourism Development Plan Draft

- Average age 50
- Repeat visitors 53%
- Average length of stay: 5.56 nights
- HHI: \$100,000+
- State of residence: California 19%, Arizona 14%, Texas 8%, Florida 4%, New York, 4%, International 6%
- Target Markets
 - New York
 - Los Angeles
 - Chicago
 - San Francisco
 - Three new markets: Houston, Washington D.C. and Boston
 - International markets include: Argentina, Australia, Brazil Chile, Germany, Netherlands, New Zealand, Mexico, UK, Costa Rica, Panama and Canada

Marketing Initiatives for FY 2017/2018

- Build upon the “Yes. All That.” Campaign from 2016/17
- Seasonal approach to marketing campaigns
- Mix of TV, digital, print and content marketing
 - TV spots to run in LA, SF, New York, Denver and Salt Lake City DMAs
 - Digital advertising will include display and retargeting banners as in years past, with the addition of programmatic and native campaigns, as well as customized content and social media.

Destination Drivers

- Skiing/Snowboarding: Home to three world-class ski resorts, Canyons Resort, Deer Valley Resort and Park City Mountain Resort, all located within a few miles of each other and connected via Park City’s free public transportation system. Collectively the ski resorts feature over 8,800 acres of terrain, and own “The Greatest Snow on Earth” positioning
- The Utah Interconnect Tour: Park City’s ski resorts are part of the Interconnect Tour, a full day guided hike/ski tour of six mountains at Deer Valley, Park City, Solitude, Brighton, Alta and Snowbird resorts.
- Utah Olympic Park: This was the venue for the 2002 Winter Olympics for luge, skeleton, bobsled and ski jumping. It is now open year around, serving as both a training center for athletes as well as a tourist destination.
- Sundance Film Festival: This annual event, held in February, is a world-class film festival that attracts more than 30,000 visitors.

Napa Valley

DMO Overview

The Napa Valley Tourism Improvement District (NVTID) includes the cities of American Canyon, Calistoga, Napa, St. Helena, the Town of Yountville, and the County's unincorporated area.



Destination Drivers

- Wineries: Over 400 wineries including Robert Mondavi, Cakebread, Rutherford and Franciscan Estate
- Food: Home to the Culinary Institute of America (CIA), and famed restaurants including French Laundry, numerous farmers' markets and unique food venues like Oxbow Public Market
- Events: The event roster ranges from concerts and musical performances to film festivals and food and wine events

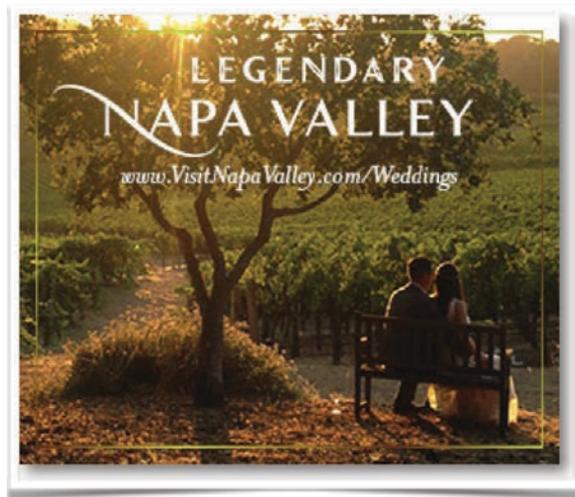
Funding

- In June 2010, the Board of Supervisors created the Napa Valley Tourism Improvement District (NVTID). The NVTID placed a 2.0% assessment on gross room rental in each Napa Valley lodging business
- The TID ensures that funding for Visit Napa Valley's targeted marketing, selling and promotion of the Napa Valley as North America's premiere wine, food, arts and wellness visitor destination is maintained at competitive levels
- Approximately 25% of the assessment revenues are allocated to local jurisdictions to fund localized tourism-related marketing programs and activities according to the adopted NVTID District Management Plan

Visitor Profile

Over 3.5 million visitors visit The Napa Valley each year and tourism is Napa County's second largest industry—generating more than \$1.9 billion in annual economic impact

- Primarily leisure travelers
 - 38.8% weekend getaway
 - 34.4 longer vacation
 - 9.0% attending a special event or wedding
- 64% day trippers / 28.6% overnight visitors
- Average occupancy (over 12 months) 73.2%, Average ADR \$295.53
- High repeat visitation
- Main activities include: wine tasting (82.3%), winery tours (52.6%) shopping (40.3%)



NLT Tourism Development Plan Draft

Marketing Budget (based on FY 2011-2015 Marketing Plan)

Targeted Public Relations:	\$555,000
Small Group, Travel Trade Marketing:	\$660,000
Website, Internet & Social Media Marketing:	\$622,000
Research, Market Intelligence & Destination Monitoring:	\$128,250
Leisure Traveler Marketing:	\$121,000
Print Advertising / Collateral:	\$35,000
Community Relations / Training & Education:	\$40,000
Guest Information Services:	\$175,000
Total Marketing Plan Budget:	\$2,336,250
Administration/Finance:	\$763,750

Total: **\$5,436,250**

Target Markets

The Napa County travel market is predominantly domestic. Approximately 93% of visitors originate from within the United States. Domestic markets include:

- California: San Francisco/Bay Area
- California: Los Angeles, Orange County & San Diego
- The Northeast: New York Metro, D.C. Metro, Philadelphia, Boston
- The Midwest: Chicago, Kansas City
- The West (excluding California): Seattle, Nevada, Denver
- The Southwest: Dallas/Ft. Worth, Houston, Austin
- The Southeast: Atlanta Metro, Florida

International visitors account for approximately 7% of all travel to Napa Valley. (The NVDC international marketing efforts are executed in collaboration with the California Travel & Tourism Commission's international outreach efforts.) International markets include:

- Canada
- The United Kingdom
- France
- Germany
- Japan
- Brazil
- China

Sonoma

Destination Overview

Sonoma County Tourism promotes Sonoma County as an overnight destination.



- In 2016 Sonoma County's occupancy rate grew 2.2 percent and the average daily rate increased 7.0 percent.
- The tourism economy generated \$1.9 billion in spending and brought in \$34.4 million in TOT in 2016.

Destination Drivers

- Wineries and wine: home to 15 different AVAs, each with different soils and climate, along with 370 wineries
- Food: Renowned for farm-to-table dining and farmer's markets
- Outdoor recreation: Home to a Redwood tree reserve, numerous state parks and coastline areas to explore on foot, kayak or bike

Funding

- 60% from BIA Assessment (\$4,908,195)
- 40% from TOT Collections (\$3,287,780)

Marketing Budget (as of FY 2016/2017 Marketing Plan)

Leisure 60%:	\$4,917,585
Meetings & Groups 30%:	\$2,458,792
Tour & Travel 10%:	\$819,598

Total: \$8,195,975



Marketing Initiatives for 2017

- Implement community engagement program that listens to stakeholders and shows the value of tourism to the local economy
- Deploy full-time professionals in the Bay Area/Silicon Valley and Sacramento to enhance meeting and group sales
- Strategic marketing and PR programs and partnerships to yield overnight visits during need periods (mid-week and shoulder season) as well as maintain visits during peak season
- Concentration on main geographic markets (California and West Coast, as well as large cities nationally) for direct-to-consumer marketing
- Continue with the new campaign that builds on success
- Appeal to new customers in emerging demographics
- Maintain Certified Tourism Ambassador program and invest in front-line service levels

Santa Cruz

DMO Overview

The mission of Visit Santa Cruz County is to stimulate the economy by promoting Santa Cruz County as a visitor, conference and film destination through marketing programs including advertising, promotion and visitor services. The priority is on attracting high-yield overnight business during the off-peak periods of the year.



- Tourism is a \$761 million industry in Santa Cruz County and generates \$22 million in local taxes
- Countywide transient occupancy tax (T.O.T.) collections in 2016 were \$10.4 million
- Average hotel occupancy for 2016 was 69.2 percent
- The average room rate for 2016 was \$150.21
- Average travel expenditures per person are \$604.00 per trip or \$151.00 per day. Per day spending per person averages \$39.60 for lodging, \$32.20 for meals, \$17.40 for shopping, \$10.20 for attractions/entertainment and \$20.40 for other expenses²⁶
- The average travel group consists of 5 people
- The average length of stay is 2.86 nights

Destination Drivers

- Boardwalk, Roaring Camp, the Wharf and UC Santa Cruz: Signature attractions include the historic Beach Boardwalk with the Giant Dipper wooden roller coaster, the Wharf, an 1880's style steam train that goes through the Redwoods and University of California's Santa Cruz campus
- Beaches: 29 miles of coastline and beaches that are perfect for a variety of activities
- Outdoor recreation: Wide variety of outdoor recreation opportunities, including surfing, mountain biking, road cycling, hiking, kayaking and boating
- Redwoods: Home to the oldest stand of ancient Redwoods south of San Francisco



²⁶ 2014 Santa Cruz County Visitor Profile Conversion Study by Campbell Rinker Marketing Research.

NLT Tourism Development Plan Draft

Visitor Profile

- 76% of visitors were Californians, 16% from other U S states and 8% from foreign countries
- 14% of fall visitors were international
- 89% of Santa Cruz visitors were from Northern California: 7% from Southern California and 4% from Central California
- The top foreign feeders were Western & Central Europe—especially during the fall. Canada was also relatively strong at 8% overall, and 21% in the Summer

Target Markets

- Santa Cruz County's primary markets include the San Francisco Bay Area and the Central Valley

Monterey

DMO Overview

The Monterey County Convention and Visitors Bureau (MCCVB) is a partnership of the City of Monterey, Carmel by-the-Sea, Seaside, Marina, Salinas, Monterey County and Pacific Grove.



- The mission of the MCCVB is to drive business growth through compelling marketing and targeted sales initiatives that maximize the benefits of tourism to our guests and members.

Destination Drivers

- Outdoor Recreation: Monterey's location makes it ideal for a variety of activities including kayaking, biking, hiking and golf
- Parks and Beaches: Home to numerous city, county and state parks and beaches, including Big Sur and the Monarch Grove Butterfly Sanctuary
- Attractions: Home to many iconic attractions, including the Monterey Bay Aquarium, Pebble Beach and Raceway Laguna Seca
- Special Events: Featured events include PGA golf classics, triathlon and marathons, mountain bike competitions, food & wine, and car racing events
- Food & Wine: One of California's largest wine growing and producing regions. The destination features a slew of food and wine events along with wine tastings, farmers markets and farm stands

Funding

The MCCVB is funded through Funding Jurisdiction Memberships, Tourism Improvement District assessments and private membership and other revenues.

- TBID funding: \$4,176,689 (2016/2017 fiscal year)
- Memberships are calculated as a formula of the previous year's actual TOT collections.
- The City of Monterey and Monterey County invest 6% of the total TOT collections; all other jurisdictions with lodging facilities in them invest 3%.

Visitor Profile

- Target visitors are urban, wealthy and middle-aged
- Enjoy food and wine, resorts, night life and shopping
- Secondary targets include older couples who enjoy outdoor adventure (golf) and arts & culture
- 80% are repeat visitors
- 84% of visitors travel by car
- Fisherman's Wharf, Cannery Row, Monterey Bay Aquarium and Pebble Beach are the top attractions

Target Markets

- Traditionally, the MCCVB has targeted San Francisco and the Central Valley for leisure travel.
- Secondary markets including San Diego, Phoenix, Las Vegas and Denver

Marketing Budget FY 2017/2018

Advertising Programs:	\$1,400,900
Media Relations:	\$141,200
Research:	\$128,741
Website:	\$144,700
Other Programs:	\$1,128,433

Total: \$2,943,975



Marketing Initiatives for 2017

Marketing tactics include an integrated marketing program for paid media focusing on brand promotions; content marketing; media relations and digital/social media

- Continue programs that develop and distribute content via paid, owned and earned channels. Particular focus will be on paid and earned social influencers while leveraging strategic influencers to contribute to and supplement owned content.
- Partnership marketing initiatives with Monterey Regional Airport for domestic marketing, plus cooperative programs with CCTC and Team San Jose for international marketing to reach farther-out prospective visitors
- Maintain website visitation while focusing on quality visits over simply quantity (i.e., getting the right people) and emphasizing on/off site referrals to member sites and listings.
- Track and report on impressions as a primary, evolved measurement of earned media in place of ad equivalency, which we will still track and report. Impressions will serve as a bridge metric on the path to evolving our measurement of earned media. A new benchmark will be set for earned media engagement in the coming year that will then determine the standard for subsequent years.
- Focus on high-priority, high-impact initiatives that include Big Sur Recovery, Sustainable Moments and the Monterey Conference Center.



NLT Tourism Development Plan Draft

- Drive familiarity and engagement for both Destination-Group and MCC-Group audiences through targeted direct marketing and retargeting programs to complement Group Sales' business development focus.
- Expand international marketing beyond primary markets China, Mexico and Canada to include opportunity markets of United Kingdom, Germany and Australia.

Palm Springs

DMO Overview

The mission of the Greater Palm Springs Convention & Visitors Bureau is to market Greater Palm Springs as a premier visitor and meeting/convention destination for the purpose of positively affecting the area's economy and the quality of life for its citizens.



Destination Drivers

- Health and Wellness: More than 300 days of sunshine a year combine with dramatic mountain backdrops and healing mineral waters to create a destination made for relaxation, health and wellness. From natural hot water spas and luxury resort spas to meditation, sound baths and yoga, Greater Palm Springs is a spa and wellness paradise.
- Outdoor Adventure: Trails and other outdoor recreation areas are perfect for hiking, mountain biking, rock climbing, horseback riding and more. Guided tours are also available for many of Greater Palm Springs' outdoor wonders, whether you're looking for a guided hike into a national park, a thrilling Jeep ride into an active fault line or a bike ride through box canyons and along lush agricultural fields. Or you can blaze your own path with scooter, motorcycle, ATV and mountain bike rentals.
- Arts & Culture: Discover an oasis of arts and culture from world-famous concerts and festivals to modern museums, public art installations and galleries. Greater Palm Springs is rich in arts and culture experiences.

Visitor Profile²⁷

- Ninety percent of all visitors have an annual income of more than \$60,000
- Seventy-five percent of all visitors have a college degree
- Seventy-five percent of all visitors are married
- At least half of all visitors to Greater Palm Springs drove in their personal vehicles
- 58% of hotel visitors are between the ages of 18 and 54, while 41% of visitors are 55+

Target Markets

- Tier 1: Year-Round Markets: Los Angeles, Orange County, San Diego, San Francisco, Sacramento, Phoenix and Las Vegas
- Tier 2: Seasonal Markets: Seattle, Portland, Chicago, New York, Minneapolis, Denver, Vancouver, Calgary, Edmonton, Toronto and Winnipeg

²⁷ Visitor Intercept Study, 2015: https://res.cloudinary.com/simpleview/image/upload/v1/clients/palmsprings/gps_visitorinterceptstudy_dd9e20fe-d645-4c6c-8ee6-1fcb54db04c6.pdf

Marketing Initiatives for 2018

The Greater Palm Springs Convention & Visitors Bureau has identified priorities for 2018, which include:

- Transportation: In order to become a year-round destination, increasing air service by growing routes and seats is a top priority. Also, providing regional transportation options will be a focus for growing visitation.
- International Markets: Finding ways to collaborate to capture a greater share of visitation from International Markets could prove a highly beneficial opportunity for all nine cities, working with the CVB's existing media efforts and resources.
- Brand Pillars: Look at our brand pillars of outdoor adventure, health and wellness and art and culture in identifying ways to develop and enhance programs to drive demand for midweek and summer/fall visitation as a high priority.
- Initial programs to be explored include:
 - Year-Round Dining Promotion
 - Outdoor Adventure
 - Health and Wellness
 - Eco Sustainability
 - "One Pass" concept promotion that encourages all city Partners to participate in marketing key attractions
 - Signage and way finding creation for trails

Leisure Sales Key Terms

- Tour Operator/Wholesale Tour Operator: Is typically business to consumer (B2C). They are the intermediaries between the consumer and the travel industry.
- Receptive Operator: Local tour operators that focus on business to business tourism expertise. Typically selling local product, hotel and activities, to other travel agents or tour operators.
- Travel Agent: Strictly business to consumer, a retailer that specializes in travel.
- Online Tour Operator (OTA): An online-tour operator is both business to business and business to consumer. Typically combines tour and travel components. Examples are: Expedia, Booking.com, Priceline, etc.
- B2B: Business to Business
- B2C: Business to Consumer
- FAM tours: FAM stands for familiarization tours. FAM tours bring sales agents from various countries and agencies into the destination for hands on experience on how to sell the destination.