



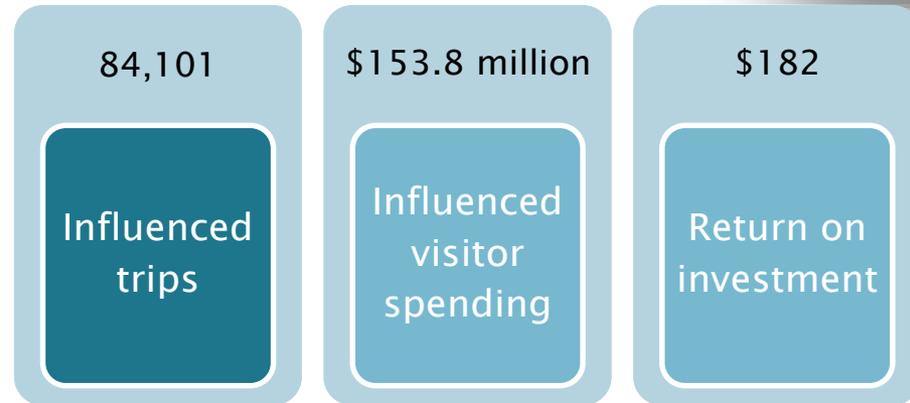
north lake tahoe

Advertising Effectiveness & ROI

August 2018

Insights

- The North Lake Tahoe paid marketing campaign influenced nearly \$154 million in visitor spending in the 2017-18 fiscal year, for a return on investment of \$182 for every \$1 spent on paid media.
- With a modest budget targeting a handful of major U.S. markets, the campaign's success is attributable to the number of households reached. The campaign was very efficient when compared to the average for destinations across the country.
- North Lake Tahoe is well positioned among the competitive set, especially for its variety of product and year-round appeal. Most of the competitors are known primarily as a warm weather or cold weather destinations. North Lake Tahoe's unique position is its superior product in both summer and winter. However, within each season there is strong competition.
- As North Lake Tahoe looks to position the destination, messaging should focus on the area's Strengths to Promote such as scenery, weather and the outdoors. However, the destination's position could be improved by including messaging related to the Opportunities to Improve such as value, family activities and accessibility.
- Additionally, current marketing is reaching a far less affluent audience than actually visits North Lake Tahoe. Future media placements should focus on a higher value traveler.
- And finally, to improve the overlap between brand and tactical executions, there could be fewer components of the campaign. Namely, resources allocated to radio would be redistributed to existing media. SMARInsights finds this medium is best suited to event-based messaging.



Background & Objectives

- As the marketing organization for the area, North Lake Tahoe Chamber of Commerce is charged with promoting not only local tourism and businesses but also the cultural and civic welfare of the community. To that end, North Lake Tahoe develops and deploys destination marketing designed to promote visitation throughout the fiscal year.
- A paid marketing campaign was placed in select markets between July 2017 and June 2018, using video, print, digital, out-of-home and radio ads as well as direct e-mail marketing.
- To measure the effectiveness of the media placements, the Chamber partnered with Strategic Marketing & Research Insights (SMARInsights). Through consumer surveying, we see the impacts of the campaign on both the image of the area and travel. The research is designed to calculate an economic impact and ROI of the leisure marketing investment.
- The following report:
 - Measures the ability of the advertising to reach the target audience and generate recall;
 - Quantifies efficiency of the media buy through the cost to reach an aware household;
 - Forwards performance measures to assess the effectiveness of the creative in meeting its various communication goals;
 - Determines the strength of the campaign in terms of spurring consumer actions, having a positive impact on perceptions, and increasing likelihood to visit;
 - Calculates the number of influenced trips, visitor spending, and return on investment of the media campaign; and
 - Assesses the relative effectiveness of various elements of the campaign to help refine future efforts.

Methodology

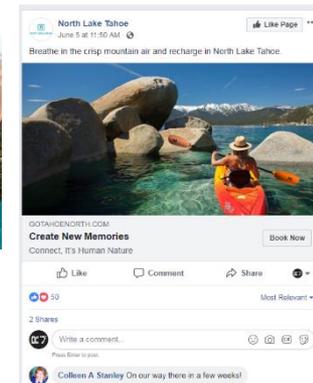
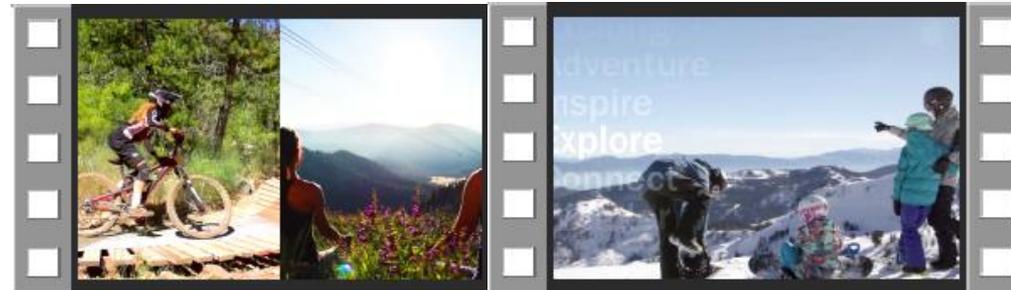
- Our advertising effectiveness methodology requires respondents to view the actual ads in order to gauge awareness, so SMARInsights developed and programmed an online survey. National sample vendors provided a link to the survey to potential respondents in the board's target markets.
- The board placed media in Los Angeles, New York, Austin, San Francisco and Sacramento. SMARInsights conducted 1,424 surveys in these markets during July 2018.
- In order to qualify for the survey, respondents had to be travelers who take overnight leisure trips and are travel decision makers.
- Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.

Campaign Overview

- North Lake Tahoe invested nearly \$850,000 throughout the 2017-18 fiscal year through three seasonal campaigns – summer, fall and winter.
- Much of the budget was allocated to digital placements through banners, social and native executions. The video components of the campaign were also placed via digital outlets.
- Print and outdoor were utilized only in select markets.
- E-mail marketing was delivered not only to the DMO’s distribution list but also to prospect lists.

| Media | Spending |
|--------------|------------------|
| Video | \$82,425 |
| Print* | \$17,000 |
| Digital | \$564,203 |
| Outdoor* | \$110,093 |
| Radio | \$28,850 |
| E-mail | \$43,286 |
| Total | \$845,857 |

*Print was placed only in LA; Outdoor was placed only in LA and San Francisco





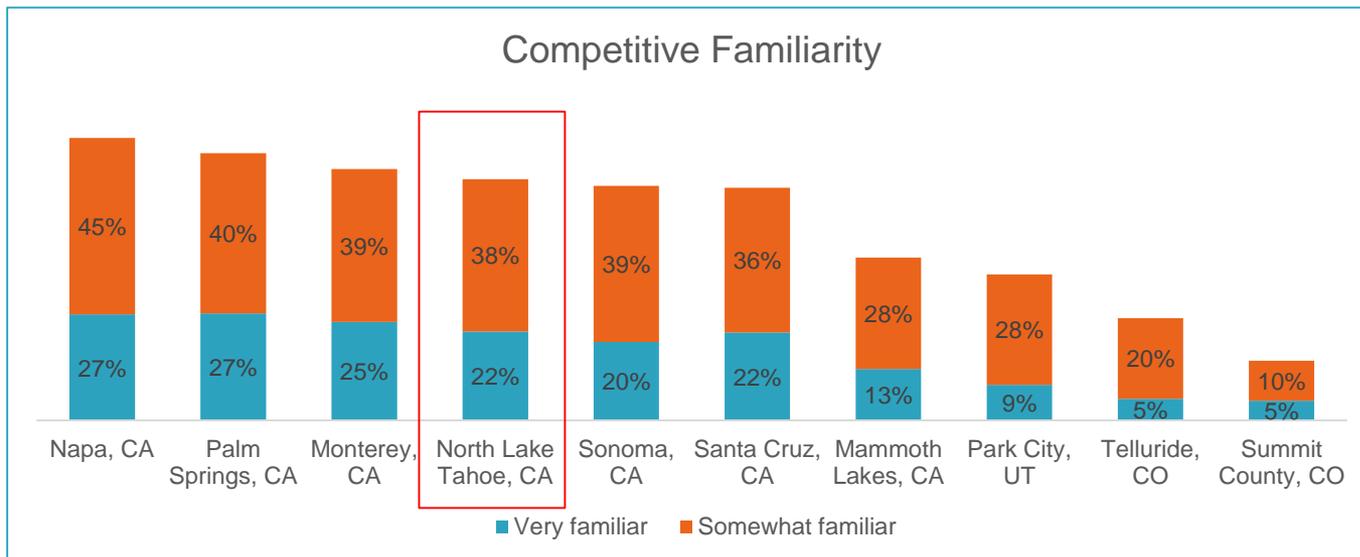
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Advertising Effectiveness & ROI

COMPETITIVE POSITION

North Lake Tahoe has more familiarity than other snow destinations but is in the middle of the pack for warmer-weather communities.

- North Lake Tahoe’s competitive set includes not only other communities best known as ski areas but also destinations with warmer climates. Consumers have considerably more familiarity with the warmer-weather destinations.
- North Lake Tahoe outpaces the competitive set that includes ski destinations but consumers are more familiar with other California destinations, including Napa, Palm Springs and Monterey.

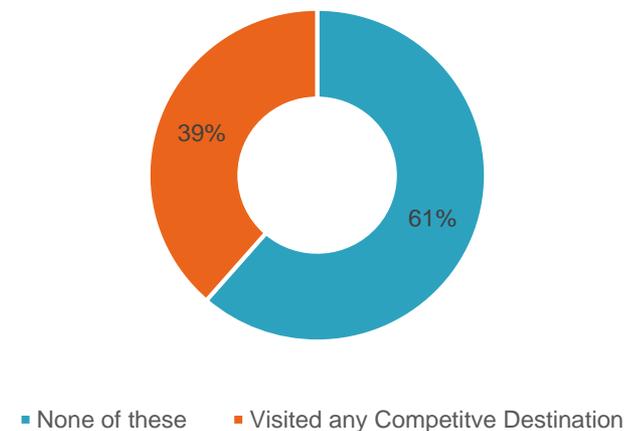


Visitation is reflective of familiarity, but less than half of consumers visit *any* of the competitive set throughout a single year.

- Visitation to the competitive set in the course of a year varies considerably. Overall, less than half of consumers in the targeted markets visited *any* of the competitive set.
- And certainly ski destinations are dependent on snow conditions. For example, Colorado had very low snow totals for much of the 2017-18 ski season, reflective of lower visitation, even among other winter competitors.



Competitive Set Visitation



Interest in visiting and researching North Lake Tahoe outperform the area's familiarity in the competitive set.

- North Lake Tahoe is well positioned among the competitive set in terms of interest in visiting and consumers being active in researching visitation to the area. Although Napa has the most familiarity, consumers in the target markets are just as likely to visit North Lake Tahoe in the next year.

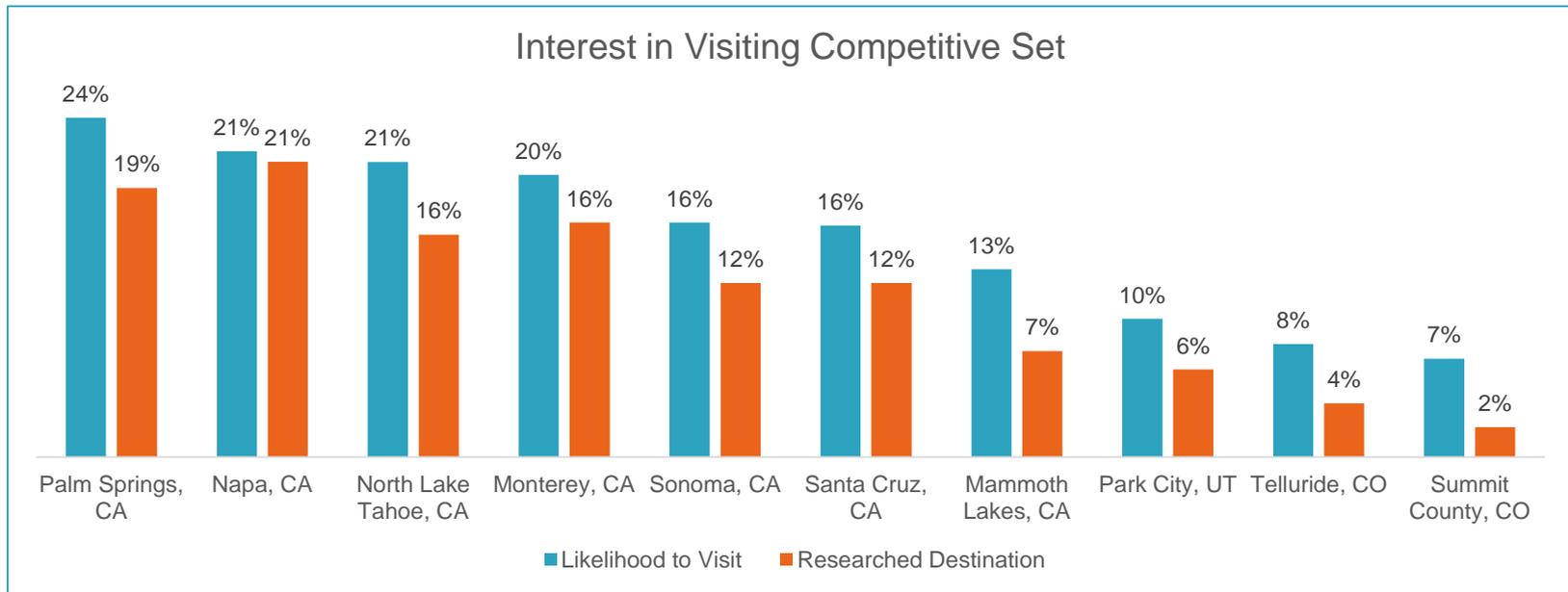


Image of North Lake Tahoe

- North Lake Tahoe’s product perception is especially strong for the scenery, atmosphere and winter product. SMARInsights typically sees that destination ratings above a 3.7 on a 5-point scale indicate a strong position.
- Marketing can be especially useful for attributes with ratings between 3.5 and 3.7 – these are products for which the destination is not thought to be as strong.
- Ratings above 3.0 but below 3.5 are less well defined and are not considered a strong position for a destination.

Strengths = Ratings > 3.7

| | Lake Tahoe |
|---|------------|
| Scenery | 4.3 |
| Atmosphere | 4.0 |
| Skiing/snowboarding | 4.0 |
| Hiking | 3.9 |
| Lodging | 3.9 |
| Weather | 3.9 |
| Snow quality | 3.8 |
| Water activities (kayaking, paddle boarding, rafting, etc.) | 3.8 |
| Dining | 3.8 |
| Service | 3.7 |

Opportunities = Ratings 3.7 <> 3.5

| | Lake Tahoe |
|------------------------------------|------------|
| Après ski activities and nightlife | 3.6 |
| Cross-country skiing | 3.6 |
| Access | 3.6 |
| Biking | 3.6 |
| Accessibility | 3.6 |
| Convenience of getting around | 3.5 |
| Off-hill activities | 3.5 |
| Spas | 3.5 |
| Family programs | 3.5 |
| Gaming | 3.5 |
| Value | 3.5 |

Weaknesses = Ratings <3.5

| | Lake Tahoe |
|--------------------------|------------|
| Live music | 3.4 |
| Shopping | 3.3 |
| Golf | 3.3 |
| Beer and wine trails | 3.2 |
| Crowding on the mountain | 3.2 |
| Beaches | 3.1 |

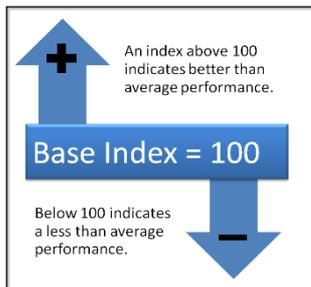
Product Position

- North Lake Tahoe is in the unique position of being a dual seasonal destination. Most of the competitive set are known to be stronger for either their warm weather or cold weather product. With average indices, many other competitors are strong on these products as well.
- Where North Lake Tahoe excels in relation to the competitive set is gaming. Although the product is considered an opportunity with a rating of 3.5, it is far stronger than any of the competitive set. The area is also strong among the competition for its top-rated attribute, scenery.

Performance Measures

- Above average performance
- Average performance
- Below average performance

| | North Lake Tahoe, CA | Mammoth Lakes, CA | Summit County, CO | Telluride, CO | Park City, UT | Napa, CA | Sonoma, CA | Santa Cruz, CA | Palm Springs, CA | Monterey, CA |
|-------------------------------|----------------------|-------------------|-------------------|---------------|---------------|----------|------------|----------------|------------------|--------------|
| Gaming | 119 | 92 | 107 | 96 | 86 | 83 | 87 | 93 | 99 | 82 |
| Scenery | 105 | 95 | 100 | 102 | 99 | 101 | 96 | 96 | 91 | 101 |
| Atmosphere | 102 | 93 | 106 | 103 | 99 | 100 | 99 | 98 | 96 | 100 |
| Value | 102 | 99 | 105 | 94 | 100 | 97 | 99 | 100 | 99 | 99 |
| Lodging | 101 | 92 | 106 | 104 | 101 | 99 | 99 | 94 | 101 | 101 |
| Weather | 101 | 92 | 96 | 97 | 93 | 104 | 102 | 104 | 95 | 101 |
| Service | 100 | 94 | 106 | 105 | 100 | 101 | 100 | 96 | 101 | 99 |
| Live music | 100 | 94 | 109 | 107 | 100 | 96 | 97 | 103 | 101 | 102 |
| Access | 100 | 94 | 110 | 99 | 99 | 102 | 100 | 99 | 100 | 102 |
| Convenience of getting around | 99 | 96 | 110 | 95 | 100 | 101 | 100 | 99 | 101 | 102 |
| Accessibility | 99 | 94 | 109 | 93 | 97 | 101 | 101 | 102 | 103 | 100 |
| Spas | 99 | 88 | 111 | 102 | 97 | 103 | 102 | 93 | 109 | 98 |
| Dining | 99 | 89 | 98 | 98 | 96 | 108 | 101 | 97 | 103 | 100 |
| Shopping | 96 | 90 | 110 | 101 | 99 | 99 | 101 | 101 | 111 | 105 |



An index above 100 indicates better than average performance.

Base Index = 100

Below 100 indicates a less than average performance.

Summer Product Position

- A handful of the competitors are known especially as winter destinations, so many fall short on the summer product attributes.
- North Lake Tahoe is well positioned for a number of summer-oriented products, including water activities and hiking.

Performance Measures

-  Above average performance
-  Average performance
-  Below average performance

| | North Lake Tahoe, CA | Mammoth Lakes, CA | Summit County, CO | Telluride, CO | Park City, UT | Napa, CA | Sonoma, CA | Santa Cruz, CA | Palm Springs, CA | Monterey, CA |
|---|----------------------|-------------------|-------------------|---------------|---------------|----------|------------|----------------|------------------|--------------|
| Water activities (kayaking, paddle boarding, rafting, etc.) | 116 | 96 | 106 | 91 | 85 | 81 | 84 | 111 | 82 | 106 |
| Hiking | 109 | 101 | 108 | 106 | 100 | 93 | 95 | 95 | 90 | 95 |
| Beaches | 107 | 90 | 90 | 80 | 73 | 81 | 84 | 134 | 86 | 129 |
| Biking | 102 | 93 | 109 | 101 | 93 | 100 | 100 | 103 | 97 | 101 |
| Golf | 99 | 89 | 103 | 94 | 90 | 98 | 99 | 91 | 116 | 107 |

Winter Product Position

- There is a clear delineation between snow-oriented destinations and more summer-focused competitors when considering winter product offerings. Although North Lake Tahoe outperforms the average when all competitors are considered, other winter-oriented destinations outperform North Lake Tahoe for snow-related product.
- However, there are only slight differences between North Lake Tahoe and other winter competitors – an indication consumers consider the product offerings of these destinations similarly aligned.

Performance Measures

- Above average performance
- Average performance
- Below average performance

| | North Lake Tahoe, CA | Mammoth Lakes, CA | Summit County, CO | Telluride, CO | Park City, UT | Napa, CA | Sonoma, CA | Santa Cruz, CA | Palm Springs, CA | Monterey, CA |
|------------------------------------|----------------------|-------------------|-------------------|---------------|---------------|----------|------------|----------------|------------------|--------------|
| Skiing/snowboarding | 130 | 122 | 127 | 131 | 135 | 72 | 77 | 70 | 67 | 69 |
| Snow quality | 128 | 124 | 134 | 134 | 136 | 74 | 77 | 68 | 70 | 71 |
| Cross-country skiing | 123 | 119 | 121 | 127 | 127 | 80 | 82 | 75 | 74 | 76 |
| Après ski activities and nightlife | 118 | 110 | 122 | 127 | 123 | 83 | 84 | 81 | 82 | 78 |
| Crowding on the mountain | 109 | 112 | 119 | 112 | 116 | 90 | 96 | 89 | 88 | 86 |
| Off-hill activities | 107 | 100 | 115 | 110 | 105 | 94 | 97 | 97 | 93 | 89 |
| Family programs | 104 | 103 | 110 | 104 | 105 | 90 | 93 | 103 | 93 | 103 |



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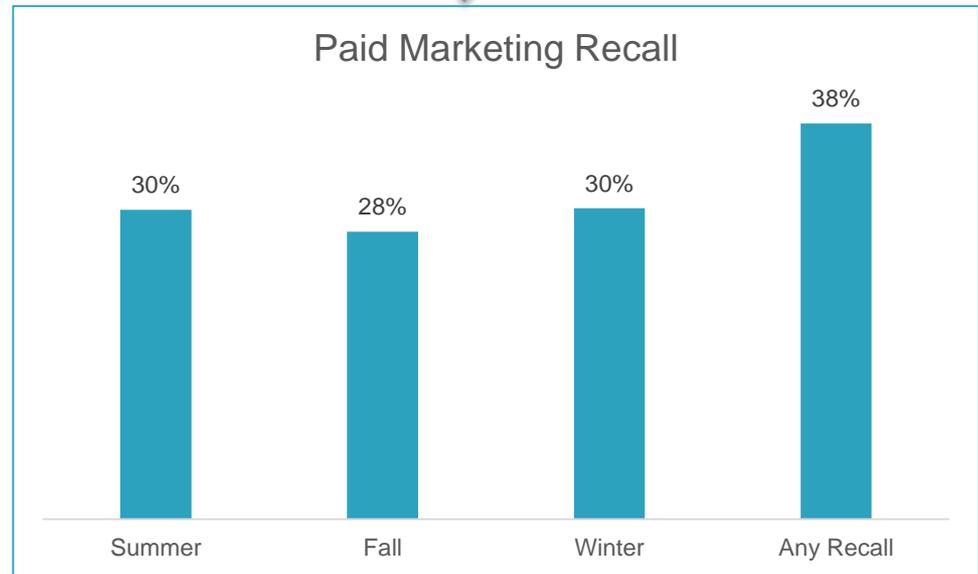
Advertising Effectiveness & ROI

MARKETING RECALL

The campaign reached nearly 5.3 million households in the targeted markets.

SMARInsights
spot market
benchmark:
\$0.67
per aware
household

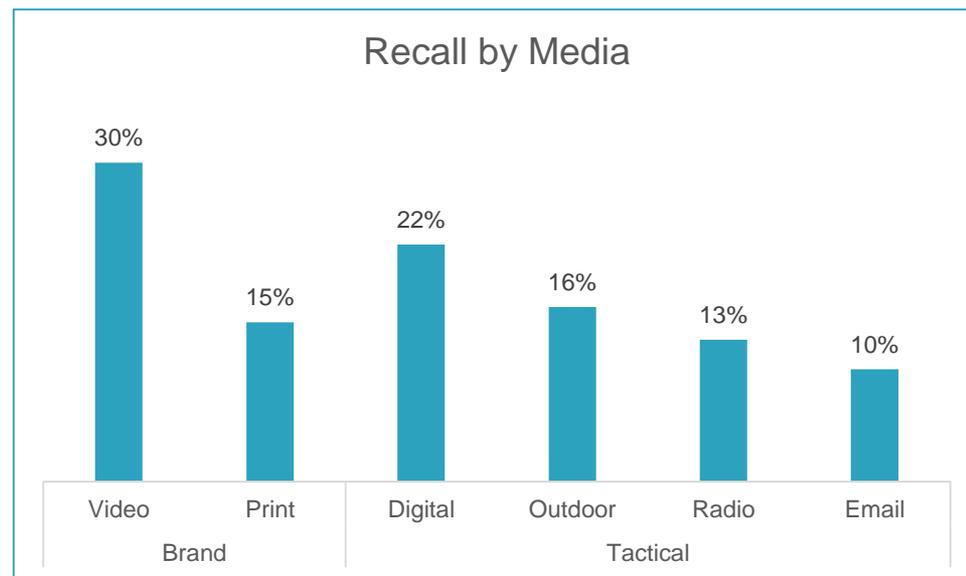
- The 2017-18 fiscal year marketing campaign reached nearly 5.3 million households in the targeted markets. Throughout the course of the 12-month fiscal year, three seasonal campaigns were placed – each receiving similar levels of recall.
- SMARInsights evaluates the performance of hundreds of destination marketing campaigns. Because of this, a benchmark has been established for campaigns attempting to reach spot markets. The average cost per aware household for a DMO spot campaign is \$0.67.
- With a modest budget targeting a number of large markets, the cost per aware household for the North Lake Tahoe campaign is far more efficient than the average.



| Cost per Aware HH | 2017-18 |
|------------------------|------------|
| Targeted HHs | 13,971,616 |
| Recall | 38% |
| Households with Recall | 5,297,031 |
| Media Spending | \$845,857 |
| Cost per Aware HH | \$0.16 |

Although digital receives the most investment, video has the broadest reach of the campaign.

- While all destination marketing efforts are designed to drive visitation, they do so in different ways. SMARInsights sees video and print executions as the best options for building a brand, while other forms of media used by North Lake Tahoe are better at delivering tactical messages.
- Video executions delivered on a digital platform are still considered brand-building media. And with the highest recall and minimal investment, video is one of the most efficient media at generating recall. SMARInsights has seen that video creates a stronger impression and therefore is noticed more and tends to have stronger recall.
- Most of the North Lake Tahoe investment is in other forms of digital advertising. And while this has the highest cost per aware household, it is still considered quite efficient.

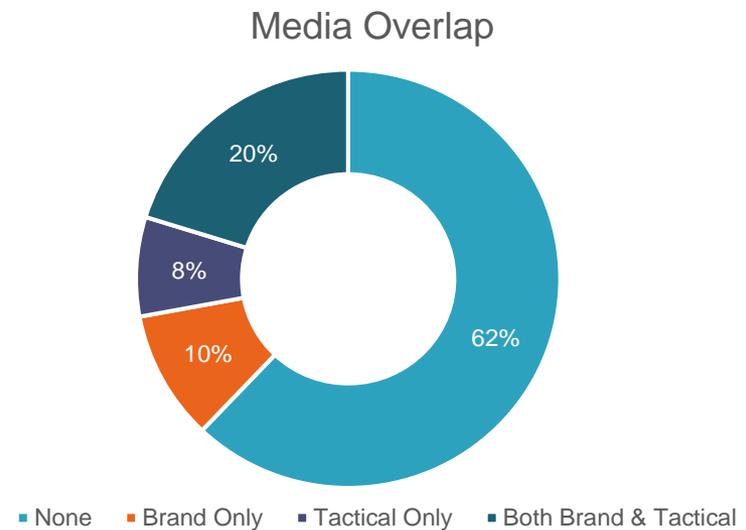
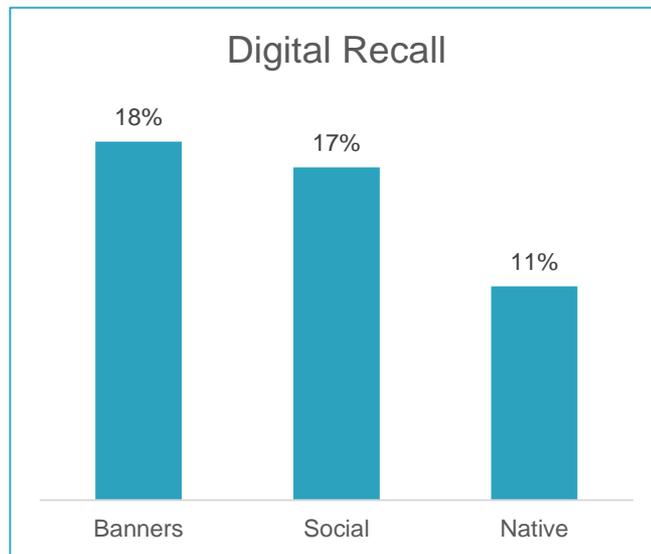


| Cost per Aware HH | Video | Print* | Digital | Outdoor* | Radio | E-mail |
|------------------------|------------|-----------|------------|-----------|------------|------------|
| Targeted HHs | 13,971,616 | 4,381,464 | 13,971,616 | 6,371,936 | 13,971,616 | 13,971,616 |
| Recall | 30% | 15% | 22% | 16% | 13% | 10% |
| Households with Recall | 4,139,829 | 648,217 | 3,077,039 | 1,031,708 | 1,838,489 | 1,456,369 |
| Media Spending | \$82,425 | \$17,000 | \$564,203 | \$110,093 | \$28,850 | \$43,286 |
| Cost per Aware HH | \$0.02 | \$0.03 | \$0.18 | \$0.11 | \$0.02 | \$0.03 |

*Print was placed only in LA; Outdoor was placed only in LA and San Francisco

With an increase in recall for all media, there is an increase in overlap.

- There were a number of digital platforms, with banners and paid social generating similar levels of recall. There were also native placements as part of the digital buy.
- Recall is important in influencing consumers to consider and visit a destination, but exposure to multiple media can push the impact even higher. This is especially true when both brand and tactical messages are delivered to consumers. Of those aware of the North Lake Tahoe marketing, more than half were exposed to both types of messages.





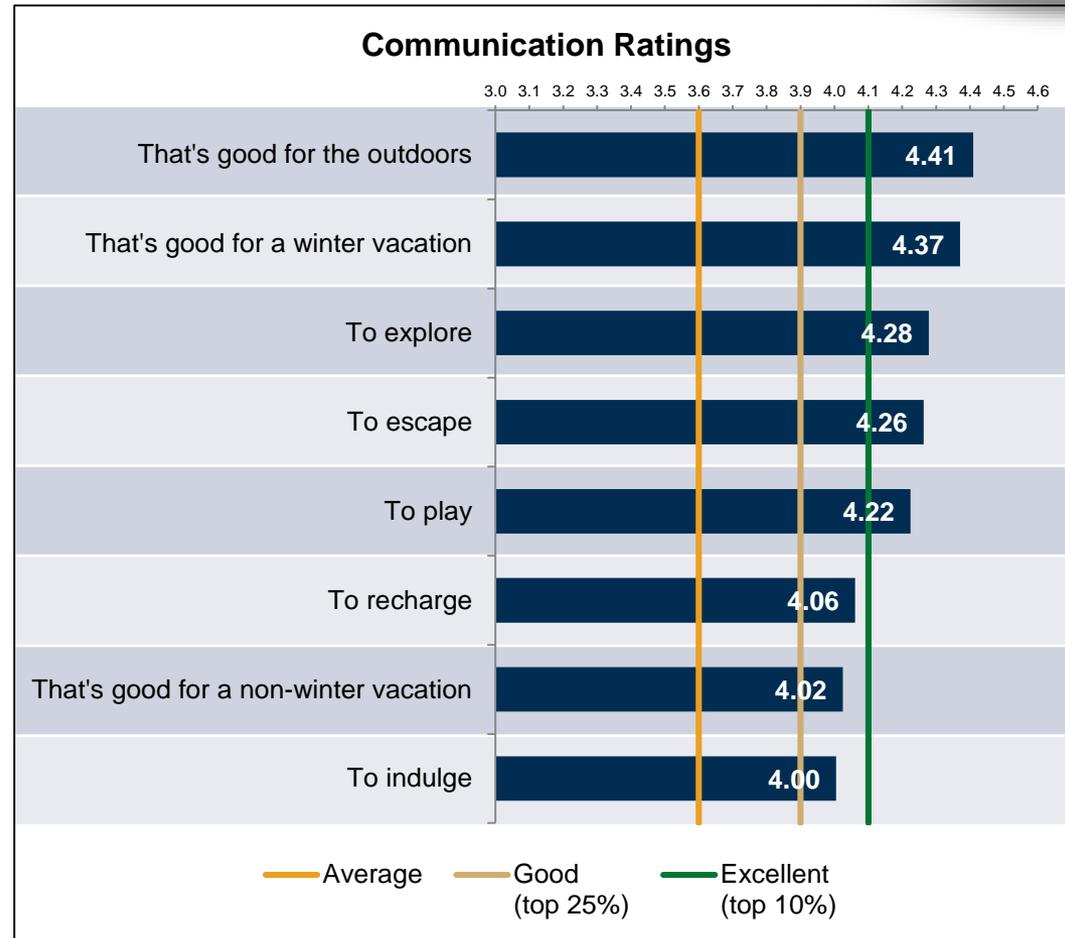
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Advertising Effectiveness & ROI

CREATIVE EVALUATION

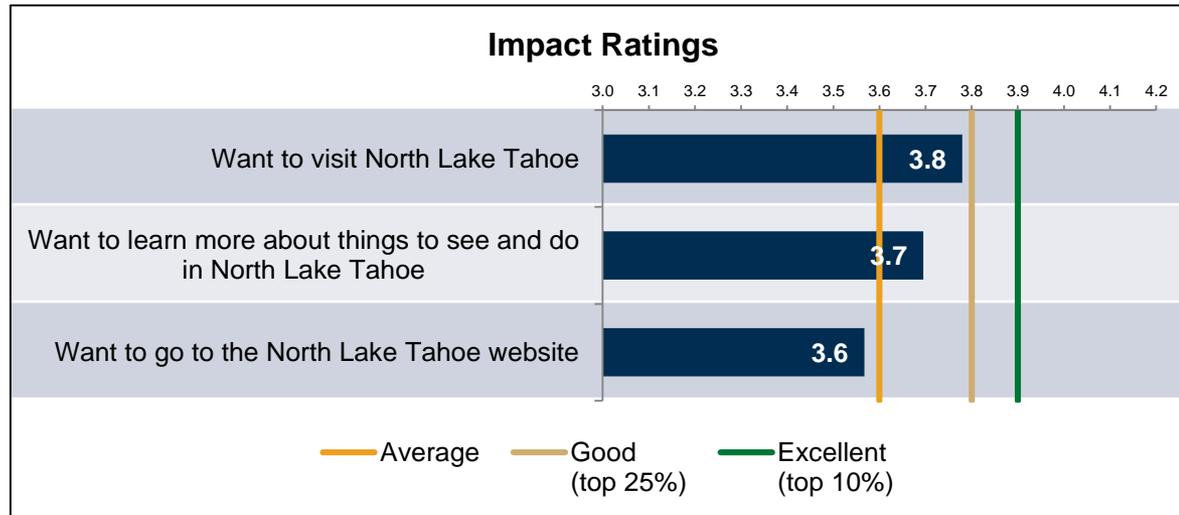
The campaign receives excellent ratings, rarely seen for local DMOs.

- SMARInsights has developed a set of creative benchmarks based on the evaluation of hundreds of DMO campaigns. These are goal ratings campaigns should attempt to reach. These ratings vary depending on what they are attempting to do – communicate a message or spur a consumer to action.
- That all of the communication attributes for the North Lake Tahoe creative receive ratings over 4.0 speaks to the area’s superior product. Only 10% of destinations receiving these kinds of ratings, and often they are reserved for state tourism bureaus that are able to spend millions of dollars in marketing production.



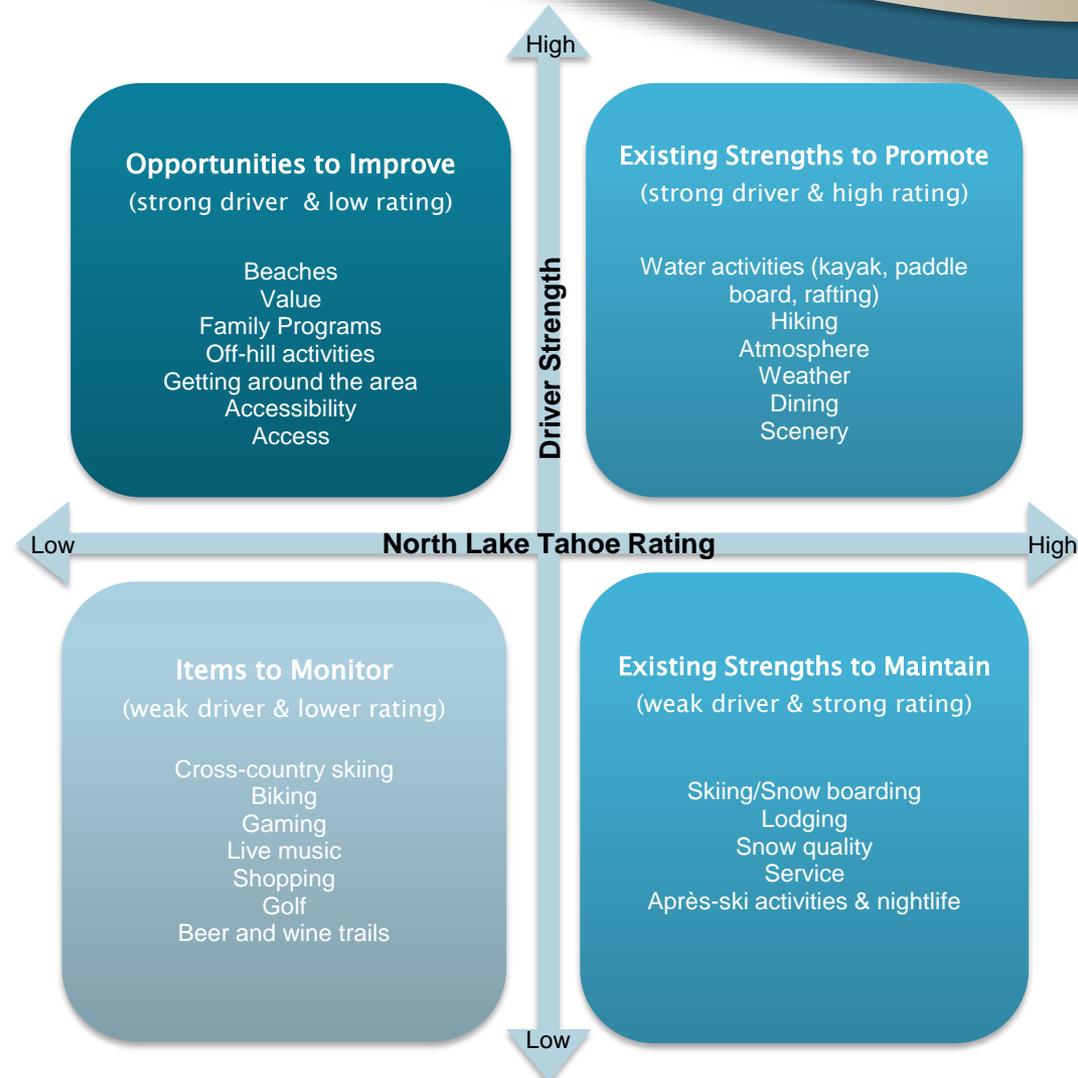
The creative isn't as strong at "closing the sale" with impacting consumers to visit or learn more about North Lake Tahoe.

- Impact ratings have slightly different benchmarks as they require an action from the consumer, which is far more difficult than just communicating a desired message. The ratings here are mostly above average but are not at the same level as the communication attributes – an indication that the brand messaging is good but the creative could be enhanced to better “close the sale.”



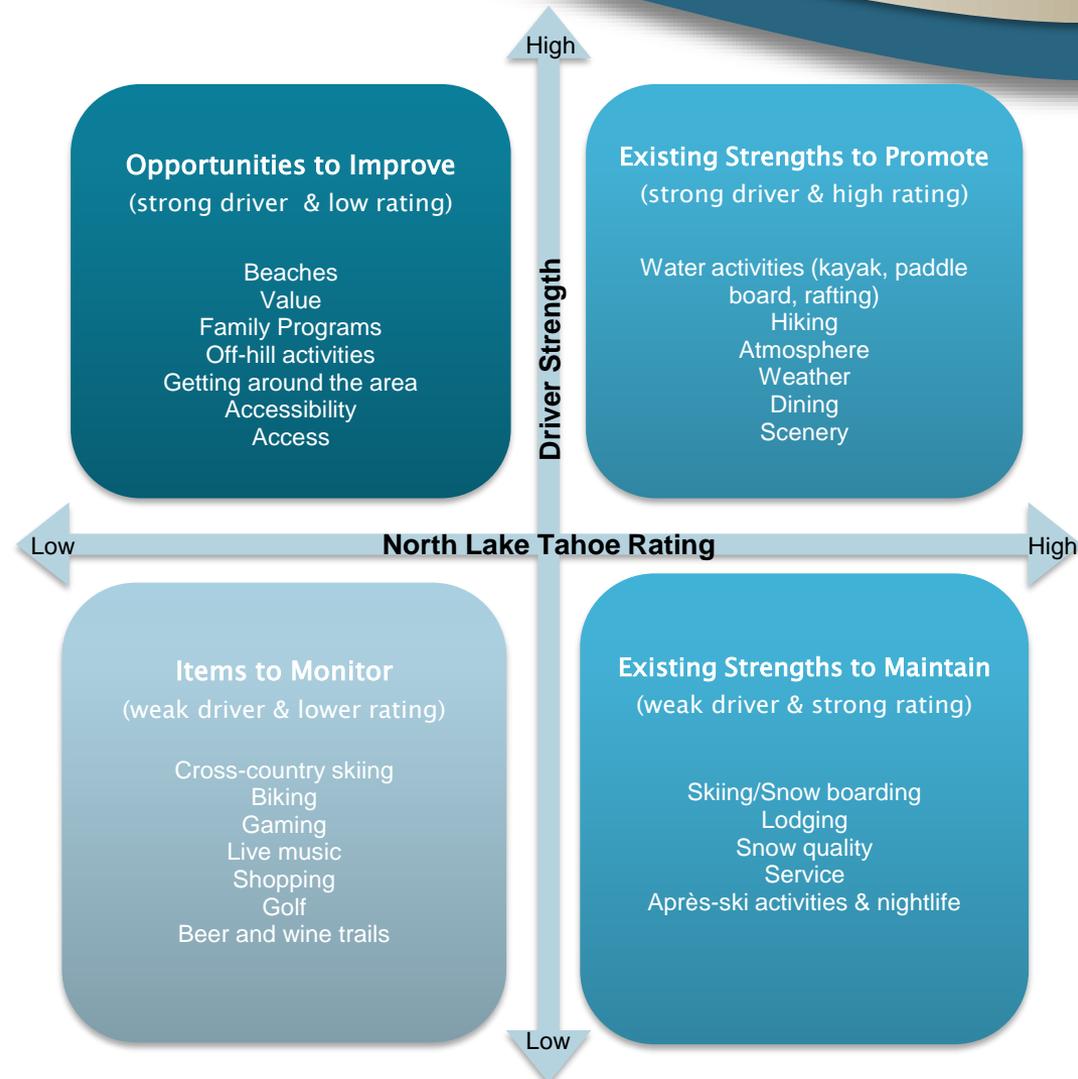
Creative Messaging

- By understanding what motivates visitors to consider North Lake Tahoe and how the area is currently performing, messaging can both appeal to what is motivating and continue to improve the image of the state.
- The lower right quadrant has attributes on which North Lake Tahoe rates better than average but are not considered drivers. However, some are motivating to a niche audience. North Lake Tahoe is certainly recognized as a great ski destination, but this is a niche audience.
- Those activities in the upper right quadrant have both high correlation to interest in visiting and receive strong image ratings. These Strengths to Promote are centered on North Lake Tahoe’s warm-weather product and the unique atmosphere. These provide an opportunity for the destination to move beyond its position as a ski destination.



Creative Messaging

- The upper left quadrant’s activities are motivating, but consumers don’t have as strong a view of North Lake Tahoe for these attributes. Improving the area’s image for these attributes and featuring them in the creative could improve interest in visiting.
- The lower left quadrant reveals attributes that are not strong drivers of interest in visiting and where the area has a lower rating. While likely important to some, these are not attributes or products that need to be addressed in creative.





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MARKETING IMPACT

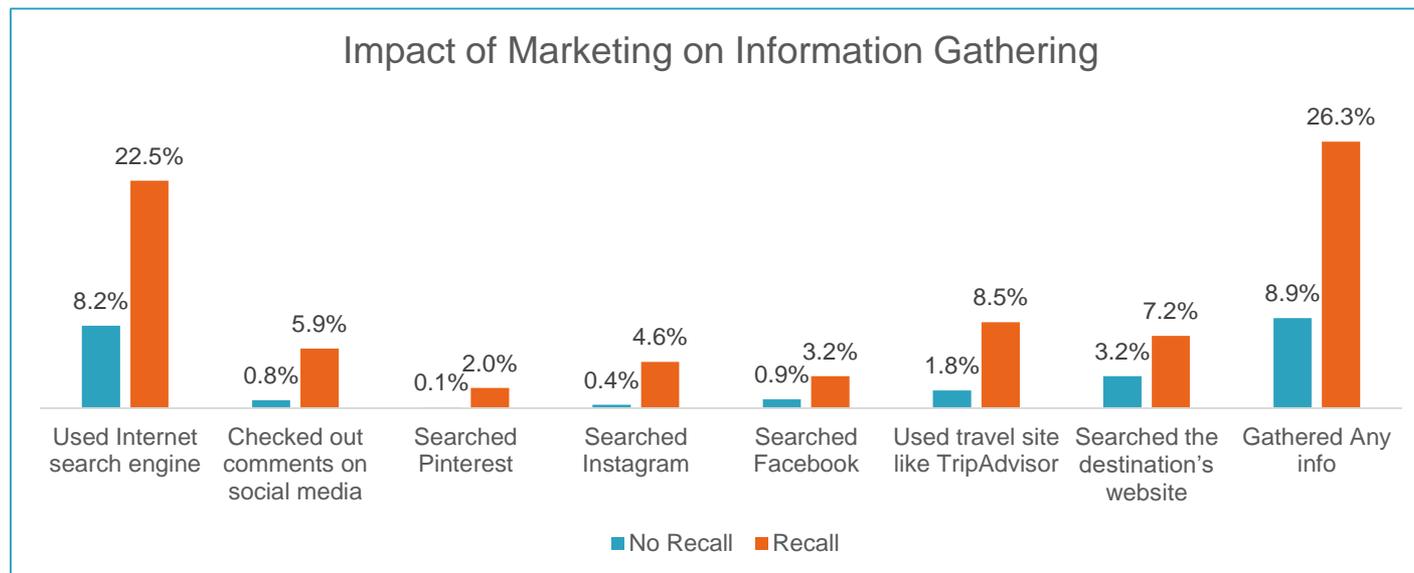
The campaign improves the image of the area, especially on important attributes.

- An important step in turning a targeted household into a visitor is to build the image of the destination. The North Lake Tahoe campaign was able to improve the image of the area for consumers who saw the advertising.
- However, it is relevant where the advertising had the most impact. The attributes in orange to the right are those that were considered Opportunities to Improve as reviewed earlier. These were attributes that were considered motivators to driving interest in North Lake Tahoe but for which the image of the area could be improved.

| | No Recall | Recall | % Change |
|---|-----------|--------|----------|
| Beer and wine trails | 3.0 | 3.4 | 12.9% |
| Beaches | 3.0 | 3.3 | 11.9% |
| Shopping | 3.2 | 3.5 | 9.9% |
| Convenience of getting around the region | 3.4 | 3.7 | 9.0% |
| Value | 3.3 | 3.6 | 8.9% |
| Family programs | 3.4 | 3.7 | 8.8% |
| Accessibility | 3.4 | 3.7 | 8.7% |
| Service | 3.6 | 3.8 | 8.0% |
| Access | 3.5 | 3.7 | 7.6% |
| Weather | 3.8 | 4.0 | 7.1% |
| Dining | 3.7 | 3.9 | 7.1% |
| Spas | 3.4 | 3.6 | 6.1% |
| Live music | 3.3 | 3.5 | 6.0% |
| Off-hill activities | 3.5 | 3.6 | 5.0% |
| Lodging | 3.8 | 4.0 | 4.9% |
| Biking | 3.5 | 3.7 | 4.8% |
| Après ski activities and nightlife | 3.5 | 3.7 | 4.8% |
| Water activities (kayaking, paddle boarding, rafting, etc.) | 3.7 | 3.9 | 4.3% |
| Snow quality | 3.8 | 3.9 | 4.0% |
| Atmosphere | 4.0 | 4.1 | 3.9% |
| Gaming | 3.4 | 3.5 | 3.2% |
| Golf | 3.2 | 3.3 | 3.1% |
| Hiking | 3.9 | 4.0 | 1.4% |
| Skiing/snowboarding | 4.0 | 4.0 | 0.4% |
| Cross country skiing | 3.6 | 3.6 | 0.3% |
| Scenery | 4.4 | 4.3 | 0.0% |

Impact on Information Gathering

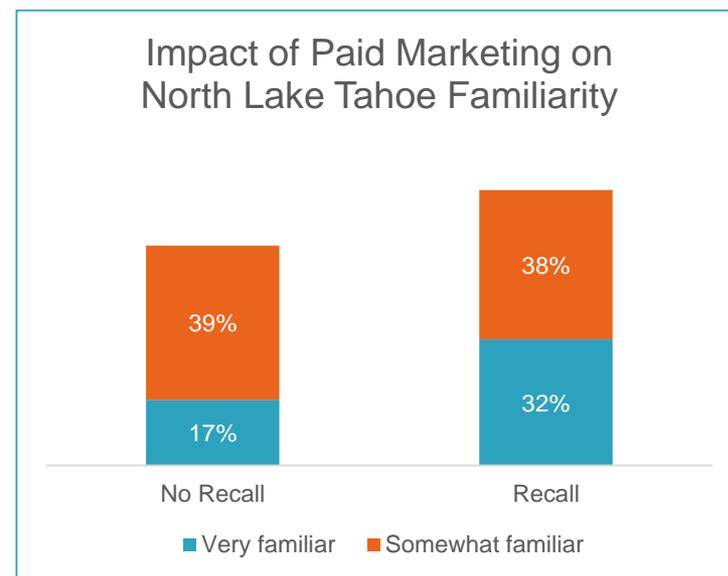
- In addition to building the image of the destination, DMO marketing can spur consumers to gather information. With the rise of digital retargeting, this can be a bit deceiving as it is not known if a consumer took an action after seeing the creative or if digital marketing was delivered to the consumer *because* they took an action. Either way, those who were exposed to any component of the North Lake Tahoe campaign were more likely to engage with the area’s online and social media presence.



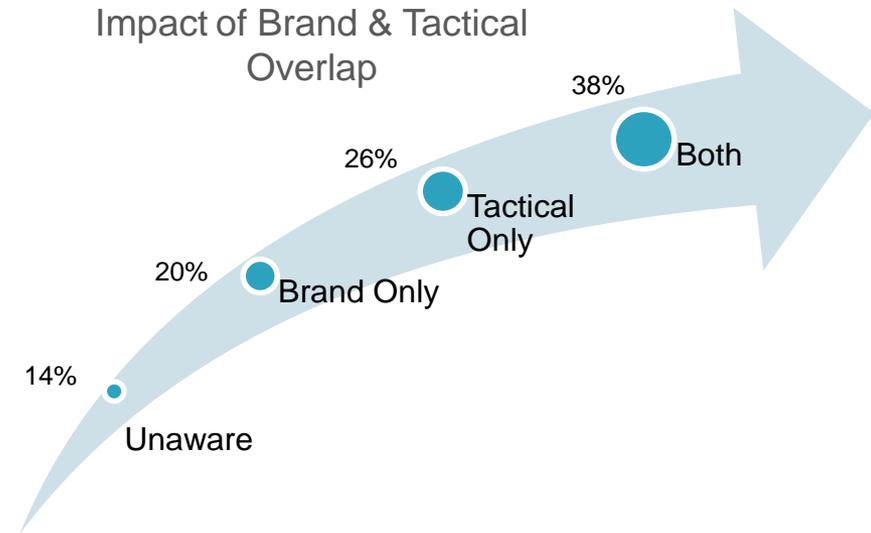
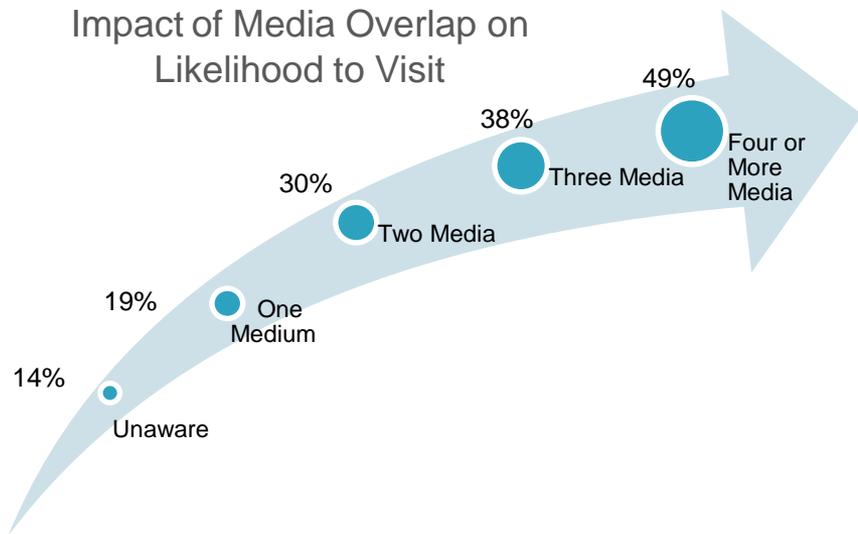
Visitors who were aware the marketing stayed longer, did more and spent more.

- In addition to improving the image of the area and motivating information gathering, ads can also change the trip plans, encouraging visitors to do more, stay longer and spend more. Those aware of the North Lake Tahoe campaign did just that; they had longer trips, participated in more trip activities and spent more on their trips.
- In addition, those who were exposed to the paid marketing had more overall familiarity with North Lake Tahoe.

| Trip specifics | Unaware | Ad-Aware |
|----------------------|---------|----------|
| Number of nights | 2.9 | 3.3 |
| Number of activities | 1.7 | 2.5 |
| Trip spending | \$1,321 | \$1,829 |



Interest in visiting increases as consumers are exposed to multiple elements of the campaign.



- As SMARInsights consistently sees, the more types of media to which consumers are exposed, the more likely they are to consider visiting. It is important to have not only overlap of multiple types of media, but also the kind of overlap is important.
- When exposed to both brand and tactical components, interest in visiting North Lake Tahoe increases considerably. Given this, it could benefit North Lake Tahoe to pare down the number of executions. Namely, SMARInsights has found that radio is best utilized for special-event marketing. And while there was minimal investment here, allocating these funds to other forms of media could increase overlap.

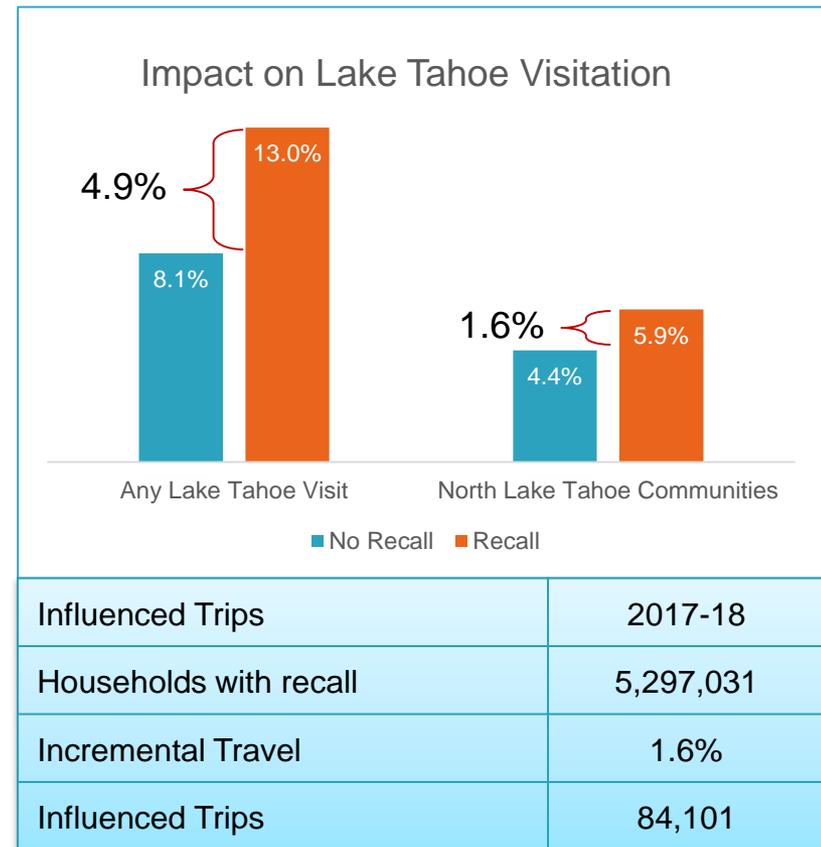
The methodology for determining influence in the industry standard for destinations.

- SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to North Lake Tahoe even without any paid advertising. Thus not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among *unaware* households is considered the base and what the area would see without the marketing campaign. Accordingly, any travel above that base by *aware* households is what is considered influenced. As such, this is a very conservative measure of influence.



The marketing was able to influence nearly 85,000 trips to North Lake Tahoe.

- Given the rate of influence on travel to North Lake Tahoe, the paid marketing generated more than 84,000 trips over the course of the 2017-18 fiscal year.
- A challenge for North Lake Tahoe is that consumers do not make a distinction between north and south but likely hear and read both as all Lake Tahoe. For this reason, there is considerably less visitation when consumers are asked about specific communities they visited.
- The paid media had nearly a 5% impact on overall travel to Lake Tahoe. However, when only North Lake Tahoe communities are considered, the rate of travel is far smaller. While other parts of the local community benefit from North Lake Tahoe’s investment, the inverse is likely true as well. It’s likely North Lake Tahoe is benefitting from investment made by Tahoe South and even individual lodging properties.



Influenced visitors spent more than \$153 million, for a return of \$182 for every \$1 invested in paid marketing.

- Given the trip spending by aware visitors, influenced trips resulted in \$153 million in economic impact to the community. This is spending that would not have occurred without the marketing campaign, returning \$182 in influenced visitor spending for every \$1 the DMO invested.
- This is considerably higher than the \$59 average SMARInsights sees for local DMOS. However, SMARInsights is often measuring a single campaign targeting travel for a shorter window of time. Because North Lake Tahoe’s evaluation is for an entire fiscal year spanning three seasonal campaigns, it is unsurprising that the return on investment would be considerably higher than the average.
- However, the higher return on investment is also attributable to both the strength of the creative as well as an efficient media buy.

| | 2017-18 |
|-------------------|----------------------|
| Incremental trips | 84,101 |
| Visitor spending | \$1,829 |
| Economic impact | \$153,820,641 |
| CVB expenditures | \$845,857 |
| ROI | \$182 |

The campaign influenced more than 247,000 additional room nights and generated \$13.1 million in taxes.

- More than 247,000 room nights are attributable to the fiscal year’s marketing campaign based on the rate of visitors using paid lodging and the number of nights they spent on their trips.
- The use of paid lodging is significantly higher for North Lake Tahoe than other destinations. More than 40% of trips often are for visiting friends and relatives, but VFR is minimal for North Lake Tahoe.
- The marketing campaign generated more than \$13.1 million in sales and lodging taxes to the municipalities served by North Lake Tahoe. Of this, \$2.6 million was generated for the Transient Occupancy Tax (TOT) from lodging.

| Paid Lodging Nights | 2017-18 |
|----------------------------|----------------|
| Incremental Trips | 84,101 |
| Trips with paid lodging | 89% |
| Trips | 75,063 |
| Nights per trip | 3.3 |
| Paid lodging nights | 247,709 |

| | California | Nevada | Total |
|---------------------------|-------------------|-----------------|---------------|
| Sales Tax | | | |
| % of overnights | 71.2% | 28.8% | 100% |
| Visitor spending | \$109,558,578 | \$44,262,062.62 | \$153,820,641 |
| State and local sales tax | 6.250% | 8.265% | 6.830% |
| State and local sales tax | \$6,847,411 | \$3,658,259 | \$10,505,671 |
| Lodging Tax | | | |
| Average lodging spend* | \$288* | | |
| Share of overnight trips | 59,901 | 24,200 | 84,101 |
| Lodging spending | \$17,251,433 | \$6,969,641 | \$24,221,074 |
| Lodging Tax | \$1,725,143 | \$906,053 | \$2,631,197 |
| Total taxes generated | \$8,572,554 | \$4,564,313 | \$13,136,867 |

* DestiMetrics 6 month historical average as of 6/30/18



north lake tahoe

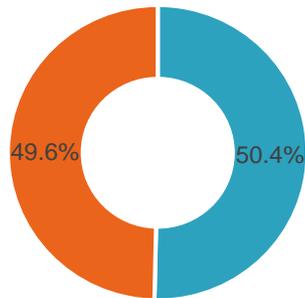
Advertising Effectiveness & ROI

TRIP SPECIFICS

About half of Lake Tahoe visitors end up staying in a North Lake Tahoe community.

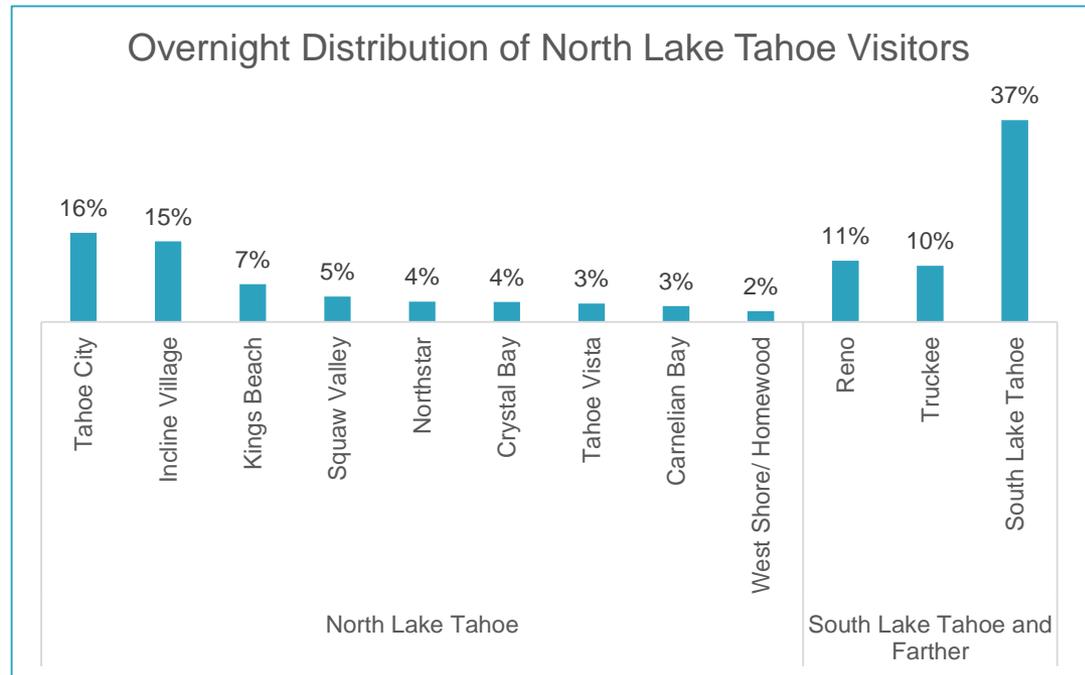
- Consumers do not make a distinction when traveling to the Lake Tahoe area if they are staying in North Lake Tahoe or South Lake Tahoe. Although all visitors indicated they overnighted in North Lake Tahoe, when asked about individual communities where they stayed, only half actually overnighted in North Lake Tahoe.

Overnight Distribution of North Lake Tahoe Visitors



■ No Overnight North Lake Tahoe ■ Overnight North Lake Tahoe

Overnight Distribution of North Lake Tahoe Visitors



North Lake Tahoe

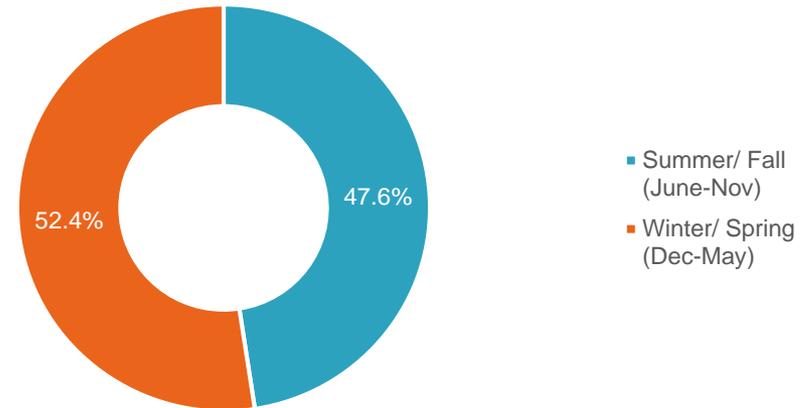
South Lake Tahoe and Farther

North Lake Tahoe sees nearly equal distribution in seasonal visitation – staking its unique position within the competitive set.

- Again, part of North Lake Tahoe’s uniqueness among the competitive set is that it is truly a year-round destination. While many competitors fall squarely as either a warm weather or cold weather leisure option, North Lake Tahoe is both. With this, there is nearly equal distribution between summer and winter trips. However, those visiting during the winter tend to be slightly more satisfied than those visiting in summer.



Seasonal Distribution of North Lake Tahoe Visitors



Summer Trip Activities

- While North Lake Tahoe’s unique position relates to its year-round appeal, what consumers are doing on seasonal trips varies. By understand what the trips have in common and what motivates each season, North Lake Tahoe can develop marketing that better communicates messages that begin to “close the sale.”

| | Summer/ Fall (June-Nov) |
|---|----------------------------|
| Dining | 62% |
| Scenic drives | 60% |
| Sightseeing | 58% |
| Viewing and enjoying natural scenery such as mountains, lakes, etc. | 55% |
| Fine dining or eating at unique local restaurant | 50% |
| Nature walks | 44% |
| Visiting small towns and rural areas | 38% |
| Shopping | 36% |
| Entertainment and nightlife | 34% |
| Hiking | 33% |
| Experiencing the unique culture of the area | 26% |
| Boating | 23% |
| Visiting a national park, forest or monument | 22% |
| Visiting historical sites | 21% |
| Fishing | 19% |
| Wildlife watching | 19% |
| Festivals (music, arts, food, etc.) | 17% |
| Visiting a spa | 16% |
| Fall colors | 15% |
| Visiting geological formations unique to the area | 14% |

| | Summer/ Fall (June-Nov) |
|---|----------------------------|
| Kayaking | 13% |
| Camping | 11% |
| Gondola rides | 10% |
| Mountain biking | 10% |
| Arts, culture activities | 10% |
| Tubing | 9% |
| Paddle boarding | 9% |
| Golf | 8% |
| Backpacking / mountaineering | 7% |
| Whitewater rafting | 7% |
| Off-roading | 5% |
| Attending or participating in sporting events | 5% |
| Parasailing | 4% |
| Road biking | 4% |
| Horseback riding | 3% |
| Scenic helicopter | 2% |
| Fat biking | 2% |
| Rock climbing | 2% |
| Yoga | 2% |
| The Ale Trail | 1% |

Summer Marketing Targets

- By understanding what visitors are doing on their summer trips and what motivated the decision to visit, North Lake Tahoe can market the area's product in different ways.
- Those activities that have both high participation and motivation are best featured in the paid marketing. These products are mostly related to the area's natural beauty and outdoor product – which marries well with scenery, water activities and hiking that were previously identified as Strengths to Promote.
- Those with high participation but low motivation can be left to industry partners to market when consumers are on their trips.
- And those activities with lower participation but high motivation are good products to feature in niche marketing.



Winter Trip Activities

| | Winter/Spring (Dec – May) |
|--|------------------------------|
| Dining | 61% |
| Viewing and enjoying natural scenery | 48% |
| Sightseeing | 48% |
| Scenic drives | 47% |
| Fine dining or eating at unique local restaurant | 44% |
| Shopping | 40% |
| Entertainment and nightlife | 31% |
| Nature walks | 30% |
| Hiking | 29% |
| Skiing | 28% |
| Visiting a national park, forest or monument | 21% |
| Visiting small towns and rural areas | 20% |
| Experiencing the unique culture of the area | 19% |
| Wildlife watching | 12% |
| Festivals (music, arts, food, etc.) | 12% |
| Visiting a spa | 11% |
| Visiting historical sites | 11% |
| Snowboarding | 10% |
| Tubing | 10% |
| Mountain biking | 10% |
| Gondola rides | 9% |
| Cross country skiing | 9% |
| Kayaking | 9% |
| Road biking | 8% |
| Horseback riding | 8% |
| Fall colors | 8% |

| | Winter/Spring (Dec – May) |
|--|------------------------------|
| Visiting geological formations unique to the area | 8% |
| Attending or participating in sporting events or competition | 8% |
| Golf | 7% |
| Fishing | 7% |
| Paddle boarding | 7% |
| Boating | 6% |
| Ice skating | 6% |
| Off-roading | 6% |
| Sledding | 6% |
| Camping | 6% |
| Yoga | 5% |
| Arts, culture activities such as museums, theater performances | 5% |
| Backcountry skiing | 5% |
| Ice climbing | 5% |
| Rock climbing | 3% |
| Backpacking / mountaineering | 3% |
| Snowmobiling | 3% |
| Parasailing | 3% |
| Whitewater rafting | 3% |
| Scenic helicopter | 2% |
| Dogsledding | 2% |
| Fat biking | 2% |
| The Ale Trail | 2% |
| Snowcat tour | 1% |
| Snowshoeing | 0% |

Winter Marketing Targets

- Certainly what motivates a winter trip is a bit different from what motivates summer trips. However, there is considerable overlap with the natural beauty of the area.
- Much of the winter product beyond skiing is considered appropriate for niche marketing.



Visitor Demographics

- It is important that the marketing reach the same kind of audience as is visiting North Lake Tahoe. SMARInsights typically finds that it is difficult to reach higher income households as they tend to consume media differently than lower income consumers. With this, the media reaches a less affluent audience than visited North Lake Tahoe throughout the 2017-18 fiscal year.
- Interestingly, SMARInsights often sees winter travel higher among younger audiences for ski destinations. However, for North Lake Tahoe, travelers tend to be Gen-Xers traveling with kids.



| | Age | | | Family | | Education | | Income | | |
|-----------------|-------|-------|-----|---------|------------|-----------------------------|------------------------|------------------|-----------------------|---------------------|
| | 18-34 | 35-54 | 55+ | Married | Kids in HH | High School or Some College | College Grad or Higher | \$75,000 or less | \$75,000 to \$150,000 | More than \$150,000 |
| Aware Household | 37% | 37% | 27% | 54% | 40% | 37% | 63% | 47% | 38% | 15% |
| Summer Visitor | 37% | 28% | 35% | 60% | 29% | 32% | 68% | 32% | 43% | 25% |
| Winter Visitor | 31% | 46% | 23% | 59% | 46% | 28% | 72% | 27% | 46% | 28% |



north lake tahoe

Advertising Effectiveness & ROI

QUESTIONNAIRE

Questionnaire

**North Lake Tahoe 2017-18 Ad Effectiveness Research
June 2018**

ZIP. What is your ZIP code? _____

- S1. Who in your household is primarily responsible for making decisions concerning travel destinations?
- Me
 - Me and my spouse/partner
 - My spouse/partner/other → TERMINATE AT END OF SREENERS

NewTravel. Please indicate if each of the following applies to you...

- I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy
- I regularly use social media like Facebook, Twitter, or Instagram
- I use video streaming services like Hulu or Netflix
- I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home → TERMINATE AFTER SCREENERS

AGE. What is your age? _____ → TERMINATE IF UNDER 18

1. How familiar are you with each of these mountain resort areas, in terms of what they have to offer as a place for a summer, spring or fall leisure trip?

| ROTATE | Not at all familiar | Somewhat familiar | Very familiar |
|----------------------|---------------------|-------------------|---------------|
| North Lake Tahoe, CA | | | |
| Mammoth Lakes, CA | | | |
| Summit County, CO | | | |
| Telluride, CO | | | |
| Park City, UT | | | |
| Napa, CA | | | |
| Sonoma, CA | | | |
| Santa Cruz, CA | | | |
| Palm Springs, CA | | | |
| Monterey, CA | | | |

2. Have you recently gathered any information about leisure travel to these areas?

| | |
|----------------------|--|
| ROTATE | |
| North Lake Tahoe, CA | |
| Mammoth Lakes, CA | |
| Summit County, CO | |
| Telluride, CO | |
| Park City, UT | |
| Napa, CA | |
| Sonoma, CA | |
| Santa Cruz, CA | |

| | |
|------------------------|--|
| Palm Springs, CA | |
| Monterey, CA | |
| None of these [ANCHOR] | |

SHOW THE DESTINATIONS THAT THEY GATHERED INFORMATION ABOUT FROM Q2.

2a. How did you gather information about each of these places? Should we add DMO Website?

| | Used Internet search engine | Checked out comments on social media | Searched Pinterest | Searched Instagram | Searched Facebook | Used travel site like TripAdvisor | Searched the destination's website | None of these |
|--------------|-----------------------------|--------------------------------------|--------------------|--------------------|-------------------|-----------------------------------|------------------------------------|---------------|
| DESTINATIONS | | | | | | | | |

3. Have you visited any of these areas for an overnight leisure trip since July 2017?

| | |
|------------------------|--|
| ROTATE | |
| North Lake Tahoe, CA | |
| Mammoth Lakes, CA | |
| Summit County, CO | |
| Telluride, CO | |
| Park City, UT | |
| Napa, CA | |
| Sonoma, CA | |
| Santa Cruz, CA | |
| Palm Springs, CA | |
| Monterey, CA | |
| None of these [ANCHOR] | |

4. How many overnight leisure trips did you take to each of these areas since July 2017?

| SHOW THOSE VISITED FROM Q3. ROTATE | |
|------------------------------------|--|
| North Lake Tahoe, CA | |
| Mammoth Lakes, CA | |
| Summit County, CO | |
| Telluride, CO | |
| Park City, UT | |
| Napa, CA | |
| Sonoma, CA | |
| Santa Cruz, CA | |
| Palm Springs, CA | |
| Monterey, CA | |

Questionnaire

5. How likely are you to take an overnight leisure trip to the following areas in the next year?

| ROTATE | Not at all likely | Not very likely | Somewhat likely | Very likely | Already planning a trip |
|----------------------|-------------------|-----------------|-----------------|-------------|-------------------------|
| North Lake Tahoe, CA | | | | | |
| Mammoth Lakes, CA | | | | | |
| Summit County, CO | | | | | |
| Telluride, CO | | | | | |
| Park City, UT | | | | | |
| Napa, CA | | | | | |
| Sonoma, CA | | | | | |
| Santa Cruz, CA | | | | | |
| Palm Springs, CA | | | | | |
| Monterey, CA | | | | | |

HAVE RESPONDENT RATE NORTH LAKE TAHOE AND ONE COMPETITOR – MUST BE AT LEAST SOMEWHAT FAMILIAR IN Q1. RATE SAME FAMILIARITY AS NORTH LAKE TAHOE OR HIGHER.

7. Please consider [INSERT NAME] and what it provides as a destination. Based on what you know or may have heard, how would you rate [INSERT NAME] for...

| ROTATE | Poor 1 | 2 | 3 | 4 | Excellent 5 |
|--|--------|---|---|---|-------------|
| Snow quality | | | | | |
| Skiing/snowboarding | | | | | |
| Cross country skiing | | | | | |
| Crowding on the mountain | | | | | |
| Value | | | | | |
| Service | | | | | |
| Weather | | | | | |
| Access | | | | | |
| Lodging | | | | | |
| Dining | | | | | |
| Après ski activities and nightlife | | | | | |
| Off-hill activities | | | | | |
| Family programs | | | | | |
| Accessibility | | | | | |
| Atmosphere | | | | | |
| Convenience of getting around the region | | | | | |
| Scenery | | | | | |
| Hiking | | | | | |
| Biking | | | | | |
| Beaches | | | | | |

| | | | | | |
|---|--|--|--|--|--|
| Golf | | | | | |
| Beer and wine trails? | | | | | |
| Shopping | | | | | |
| Gaming | | | | | |
| Spas | | | | | |
| Water activities (kayaking, paddle boarding, rafting, etc.) | | | | | |
| Live music | | | | | |

ASK Q8 – Q19 IF VISITED NORTH LAKE TAHOE AT Q3. ELSE SKIP TO AD SECTION.

8. Please give us some information about the overnight leisure trip(s) you took to North Lake Tahoe since July 2017. What month(s) did you visit North Lake Tahoe?

| | |
|---------------|--|
| July 2017 | |
| August 2017 | |
| September | |
| October 2017 | |
| November 2017 | |
| December 2017 | |
| January 2018 | |
| February 2018 | |
| March 2018 | |
| April 2018 | |
| May 2018 | |
| June 2018 | |

IF VISITED MULTIPLE TIMES FROM Q4, SAY:

For the following questions, please think about the overnight North Lake Tahoe trip that you consider to be your primary trip (stayed the longest, did the most).

ASK Q9 IF VISITED MULTIPLE TIMES FROM Q4.

9. During which month was your primary North Lake Tahoe trip?

| | ALLOW ONLY ONE SELECTION |
|----------------|--------------------------|
| July 2017 | |
| August 2017 | |
| September 2017 | |
| October 2017 | |
| November 2017 | |
| December 2017 | |
| January 2018 | |
| February 2018 | |
| March 2018 | |
| April 2018 | |
| May 2018 | |
| June 2018 | |

Questionnaire

10. Overall, how satisfied are you with your North Lake Tahoe trip?

- a. Very satisfied
- b. Satisfied
- c. Neither satisfied nor dissatisfied
- d. Dissatisfied
- e. Very dissatisfied

11. Which of the following activities did you participate in during your North Lake Tahoe trip? [ROTATE LIST]

| |
|---|
| Skiing |
| Cross country skiing |
| Backcountry skiing |
| Snowboarding |
| Snowmobiling |
| Snowcat tour |
| Snowshoeing |
| Dogsledding |
| Ice skating |
| Sledding |
| Ice climbing |
| Tubing |
| Fall colors |
| Viewing and enjoying natural scenery such as mountains, lakes, etc. |
| Hiking |
| Camping |
| Backpacking / mountaineering |
| Nature walks |
| Wildlife watching |
| Fishing |
| Scenic drives |
| Scenic helicopter |
| Gondola rides |
| Visiting a national park, forest or monument |
| Visiting geological formations unique to the area |
| Off-roading |
| Attending or participating in sporting events or competition |
| Festivals (music, arts, food, etc.) |
| The Ale Trail |
| Road biking |
| Mountain biking |
| Fat biking |
| Rock climbing |
| Horseback riding |
| Golf |
| Boating |
| Kayaking |
| Paddle boarding |

| |
|--|
| Sightseeing |
| Arts, culture activities such as museums, theater performances |
| Visiting a spa |
| Fine dining or eating at unique local restaurant |
| Shopping |
| Entertainment and nightlife |
| Visiting small towns and rural areas |
| Experiencing the unique culture of the area |
| Visiting historical sites |
| Parasailing |
| Yoga |
| Dining |
| Whitewater rafting |
| None of these |

SHOW THE ACTIVITIES SELECTED IN Q11 PLUS "NONE" AND ASK:

12. Of these activities, please indicate if there were any that were a major influence when deciding to visit North Lake Tahoe. You may choose up to three. ALLOW UP TO THREE SELECTIONS.

13. How many nights did you spend in North Lake Tahoe on this trip? __

14. Including you, how many people were in your travel party? __

ASK Q15 IF Q14 >1

15. Of those, how many were children under the age of 18? __

ASK Q16 IF Q13 >0

16. What form(s) of lodging did you use on your trip?

- a. Hotel or motel
- b. Inn, lodge or bed & breakfast
- c. Resort
- d. Homeshare such as Airbnb
- e. Rental home, condominium, or timeshare
- f. With friends or family
- g. Other, please specify _____

16a. What area did you stay in? Select all that apply.

| |
|---------------------|
| Tahoe City |
| Kings Beach |
| Carnelian Bay |
| Tahoe Vista |
| Incline Village |
| Crystal Bay |
| West Shore/Homewood |
| Squaw Valley |
| Northstar |

Questionnaire

| |
|------------------|
| Reno |
| Truckee |
| South Lake Tahoe |
| other |

20. What is your usual mode of transportation when traveling to North Lake Tahoe? Select all that apply.

- Airplane
- Car
- Airplane/Rental Car
- Organized trip
- Other

21. Thinking about your trip, how well were your expectations met? Would you say that this trip...?

| | | | | |
|------------------------------------|----------------------------|-----------------------|--------------------------------|--|
| Greatly exceeded expectations 5 | Exceeded expectations 4 | Met expectations 3 | Did not meet expectations 2 | Fell extremely below expectations 1 |
|------------------------------------|----------------------------|-----------------------|--------------------------------|--|

ASK Q19 if Q18 < 3.

22. Why do you feel your expectations were not met?

17. Please estimate how much your travel party spent while in Lake Tahoe on each of the following. Your best estimate is fine.

- Lodging/Accommodations _____
- Meals/Food/Groceries _____
- Entertainment/Attractions _____
- Activities such as bike rentals, golf, rafting, etc. _____
- Shopping _____
- Entertainment such as shows, theater or concerts _____
- Transportation such as taxi/Uber/shuttle _____
- Other _____

18. Did you share your most recent North Lake Tahoe travel experience on any social networking sites?

- Yes
- No

IF Q18 = YES, ASK Q19

19. Which of the following social networking sites did you use to share your experience?

- Facebook
- Instagram
- Pinterest
- Twitter
- YouTube
- Review websites (Yelp/TripAdvisor etc.)
- Blog
- Snapchat
- Other, please specify _____

ADVERTISING AWARENESS AND RATINGS SECTION

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

SHOW ALL ADS WITHIN A MEDIUM ON SAME SCREEN AND ASK AWARENESS OF EACH.

ROTATE

VIDEO



NLT Spartan Spot 2017 v5a.mp4
<https://youtu.be/NPv3XK6zFuA>



North Lake Tahoe - World Cup Spot.mp4
<https://youtu.be/UPVjiv127ZU>



North Lake Tahoe Winter Spot (TV SAFE).mp4
<https://youtu.be/q3Vpux8b0aI>

20. Have you seen this video ad before?

- 1. Yes
- 0. No

Questionnaire

PRINT – SOUTHERN CALIFORNIA ONLY



NLT_SunsetPrintAd_FullPage_v2.jpg

21. Have you seen this print ad before?
1. Yes
 0. No

DIGITAL

SHOW ON ONE PAGE
FALL

| | |
|---|---|
|  <p>Connect it's human nature PLAN YOUR TRIP</p> |  <p>Climb it's human nature PLAN YOUR TRIP</p> |
| <p>n north lake tahoe</p> | <p>n north lake tahoe</p> |
| <p>01_300x250_FallDigi_Family_1.jpg</p> | <p>01_300x250_Millennial_1.jpg</p> |
|  <p>Explore it's human nature PLAN YOUR TRIP</p> | |
| <p>n north lake tahoe</p> | |
| <p>01_300x250_Workaholic_1.jpg</p> | |

Winter Banners



NLT_Boomer_300x250.html



NLT_Family_300x250.html



NLT_Millennial_300x250.html

Spring Banners

| | |
|---|---|
|  <p>Smile it's human nature PLAN YOUR TRIP</p> |  <p>Travel it's human nature PLAN YOUR TRIP</p> |
| <p>300x250_SpringDigi_Fam_1.jpg</p> | <p>300x250_SpringDigi_General_1.jpg</p> |
|  <p>Explore it's human nature PLAN YOUR TRIP</p> |  <p>Breathe it's human nature PLAN YOUR TRIP</p> |
| <p>300x250_SpringDigi_Outdoor_1.jpg</p> | <p>300x250_SpringDigi_Workaholics_1.jpg</p> |

22. Please indicate if you have seen each of these online ads before.
1. Yes, I have seen this ad before
 0. No, I have not seen this ad before

PAID SOCIAL

| | |
|--|---|
|  <p>Spring Social</p> |  <p>Fall Social1</p> |
|  <p>Fall Social2</p> |  <p>Winter Social</p> |

23. Have you seen this ad on social media before?
1. Yes, I have seen this ad before
 0. No, I have not seen this ad before

Questionnaire

NATIVE SOCIAL

Summer



Summer Native.jpg

Winter



PAID CONTENT BY NORTH LAKE TAHOE
Make Your Own Path
Snowden along the water's edge in North Lake Tahoe.

Spring



Spring Native.JPG

24. Have you seen this ad on social media before?
- 0. Yes
 - 0. No

OUTDOOR

Winter (LA & SF ONLY) OUTDOOR – ASK ON ONE PAGE



NLT_DigitalBillboards_v2-1.jpg



NLT_DigitalBillboards_v2-3.jpg



NLT_DigitalBillboards_v3-1.jpg



NLT_DigitalBillboards_v3-2.jpg

25. Please indicate if you have seen each of these billboard ads before.
- 1. Yes, I have seen this ad before
 - 0. No, I have not seen this ad before

RADIO

JAN18-REV.mp3

26. Have you heard this radio ad before?
- 1. Yes
 - 0. No

Questionnaire

Email Blast

eBlasts – Fall



LeisureEblast_Sept_1.jpg

eBlasts – Winter



LeisureEblast_Jan03_1.jpg

eBlasts – Spring



NLT_AprConsumerEblast_v1.jpg

27. Have you received this or a similar email before?

- 1. Yes
- 0. No

28. Thinking about all of the ads that you just saw, how much do you agree that this campaign shows a place...?

| ROTATE | Disagree strongly | Disagree | Neutral | Agree | Agree strongly |
|---------------------------------------|-------------------|----------|---------|-------|----------------|
| To escape | | | | | |
| To recharge | | | | | |
| To explore | | | | | |
| To play | | | | | |
| To indulge | | | | | |
| That's good for a winter vacation | | | | | |
| That's good for a non-winter vacation | | | | | |
| That's good for the outdoors | | | | | |

29. How much does this campaign make you...?

| ROTATE | Disagree strongly | Disagree | Neutral | Agree | Agree strongly |
|---|-------------------|----------|---------|-------|----------------|
| Want to learn more about things to see and do in North Lake Tahoe | | | | | |
| Want to go to the North Lake Tahoe website | | | | | |
| Want to visit North Lake Tahoe | | | | | |

Now we'd like to ask you some questions about general travel and lifestyle preferences.

30. People look for different experiences when they travel. When you are picking a destination for a leisure trip, how important are each of the following?

| ROTATE | Not at all important | | | | Very important |
|--|----------------------|---|---|---|----------------|
| Relaxation and rejuvenation | 1 | 2 | 3 | 4 | 5 |
| Enrichment or learning | 1 | 2 | 3 | 4 | 5 |
| Connection with family or friends | 1 | 2 | 3 | 4 | 5 |
| Thrills and excitement | 1 | 2 | 3 | 4 | 5 |
| A place to be pampered | 1 | 2 | 3 | 4 | 5 |
| Being amazed by the sites or experiences | 1 | 2 | 3 | 4 | 5 |

Questionnaire

31. Please indicate how much you agree with the following statements.

| ROTATE | Disagree strongly | Disagree somewhat | Neutral | Agree | Agree strongly |
|--|-------------------|-------------------|---------|-------|----------------|
| I prefer to have a very relaxing/laid back vacation | | | | | |
| I enjoy being pampered on my vacation | | | | | |
| I prefer a vacation where I can be self-indulgent | | | | | |
| I prefer a vacation that offers great family experiences | | | | | |
| I like to learn about art, culture, history | | | | | |
| I like taking on new and different challenges | | | | | |
| Risk taking is exciting to me | | | | | |
| My children strongly influence the destination I choose for vacation | | | | | |

The following questions are for classification purposes only so that your responses may be grouped with those of others.

D1. Are you...?

1. Male
2. Female

D2. What is your annual household income range?

1. Less than \$35,000
2. \$35,000-\$44,999
3. \$45,000-\$54,999
4. \$55,000-\$64,999
5. \$65,000-\$74,999
6. \$75,000-\$99,999
7. \$100,000-\$149,999
8. \$150,000-\$200,000
9. \$200,000+

D3. Are you currently?

1. Married
2. Single

D4. Which of the following categories represents the last grade of school you completed?

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

D5. Including you, how many people are currently living in your household? ____ (IF 1, GO TO D7)

D6. How many living in your household are children younger than age 18? ____

D7. Please indicate the ages of your children (Select all that apply).

1. 0-2 years old
2. 3-6 years old
3. 7-12 years old
4. 13-14 years old
5. 15-18 years old