



north lake tahoe

Incline Village | Crystal Bay Visitors Bureau

AGENDA

Board Meeting

Lake Tahoe Incline Village Crystal Bay Visitors Bureau Wednesday October 23rd, 2019 3pm

The Board of Directors of the Lake Tahoe Incline Village Crystal Bay Visitors Bureau will hold their monthly meeting on Wednesday October 23rd, 2019 beginning at 3:00pm. The meeting will be held at the Incline Village Crystal Bay Visitor Bureau office located at 969 Tahoe Blvd, Incline Village, NV 89451.

Public Comment will be at the beginning and ending of this meeting, and is limited to three minutes. The public is encouraged to comment on all agenda items as well as issues not on the agenda during the Public Comment period. Agenda items may be taken out of order, may be combined for consideration by the Board, and may be removed from the Agenda at any time. Members of the public desiring to speak must complete a "Request to Speak" form and return it to the IVCBVB clerk at the beginning of the meeting. Comments based upon viewpoint may not be restricted by the Board.

- | | |
|---|---------------------------------|
| I. Call to Order/Roll Call | Bill Wood |
| II. PUBLIC COMMENT – Pursuant to NRS 241.020
This is the time for public to comment on any matter whether or not it is included on the Agenda of this meeting. | Bill Wood |
| III. Approval of Agenda (For Possible Action) | Bill Wood |
| IV. Approval of September Board Minutes (For Possible Action) | Bill Wood |
| V. 2018/19 Advertising Effectiveness and ROI Presentation | Nick Falkenstein, SMARI |
| VI. Tahoe Transportation District/One Tahoe Funding Plan (Discussion and Presentation for Possible Action) | Carl Hasty/Derek Morse |
| VII. Review and Approval FY 2019/20 CEO Performance Goals | Bill Watson/Andy Chapman |
| VIII. Review of August 2019 Financial Statements (For Possible Action) | Greg Long |
| IX. Review of October Dashboard Report | Greg Long/Andy Chapman |
| X. Coop Departmental Reports
a. Conference Sales
b. Leisure Sales | Andy Chapman |

Board Agenda

- c. Website Content
- d. Communications/Social
- e. Advertising

XI. Management Reports **Staff**
a. Operations Report
b. Business Development Manager Report
c. President/CEO

XII. Old Business **Bill Wood**

XIII. New Business **Bill Wood**

XIV. Director Comments **Bill Wood**

XV. PUBLIC COMMENT – Pursuant to NRS 241.020 **Bill Wood**
This is the time for public to comment on any matter whether
or not it is included on the Agenda of this meeting.

XVI. Adjournment – (For Possible Action)

Physically disabled persons desiring to attend should contact Greg Long at (775) 832-1606.
Support materials can be found at <https://www.gotahoenorth.com/north-lake-tahoe/business-community/incline-village-crystal-bay-visitors-bureau/>

Public Postings:

Incline Village Post Office

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Incline Village Crystal Bay Visitors Bureau

**September Board Meeting Minutes
Lake Tahoe Incline Village Crystal Bay Visitors Bureau
Wed, Sept 25, 2019, 3pm**

I. Call to Order/Roll Call

Michael Murphy

The Incline Village Crystal Bay Visitors Bureau (IVCBVB) Board Meeting was called to order at 3:03pm by acting Chair Murphy. Roll call was taken, and the following members were present: Blane Johnson (phone), Heather Bacon (phone), Bill Wood (phone, in person @3:22pm) and Geno Menchetti. The following IVCBVB employees were present: Andy Chapman, CEO/President, Bart Peterson, Business Development Manager and Greg Long, Operations and Finance Director. The following guests were present: Brad Cupurro, CPA, Amber Burke, Director of Marketing, NLTRA, Lindsey Moore and Cathy Nanadiego, Augustine Agency.

II. PUBLIC COMMENT – Pursuant to NRS 241.020

Michael Murphy

This is the time for public to comment on any matter whether or not it is included on the Agenda of this meeting.

None

III. Approval of Agenda (For Possible Action)

Michael Murphy

Motion to approve the presented Agenda.
Agenda approved by Michael Murphy.

IV. Approval of July Board Minutes (For Possible Action)

Michael Murphy

Motion to approve the July Board Meeting Minutes.
July Board Meeting minutes approved by Michael Murphy.

V. Review of FYE 2018/19 Financial Statements

Andy Chapman/Brad Capurro

CEO Chapman introduces Brad Capurro, CPA. Capurro reviews final FYE 2018/19 financial statements including Statement of Financial Position, Statement of Activities and Profit and Loss FYE 5 year comparison chart.

Highlights:

- Profit and Loss show nothing concerning
- Legislative change in 2014 increased collection of TOT on vacation rentals
- Payroll increased due to added sales position in 2016
- July 2019 Fund Transfer recorded early and is sitting in cash
- Net Assets sit at \$374,340.32

IV-1

Motion to approve the FYE 2018/19 Financial Statements by Heather Bacon. Second by Bill Wood. Approved.

VI. Review of August 2019 Financial Statements

Greg Long

Greg Long summarizes August financial statements with input from CEO Chapman.

Motion to approve the August 2019 Financial Statements by Bill Wood. Second by Heather Bacon. Approved.

VII. 2018/2019 NLTMC Program Recap

Burke/Peterson

CEO Chapman introduces Amber Burke and explains that there will be more touchpoints in the coming year to review marketing materials by the Board. Peterson reviews the results from the conference and leisure sales efforts and how they affect the local properties. Burke reviews the marketing results and changes that took place in the previous year.

VIII. Review of Winter 2019/20 Consumer Creative Campaign

Moore/Nanadiego

CEO Chapman introduces Moore and Nanadiego from Augustine Agency. Moore and Nanadiego review the specific advertising campaigns and target demographics for the coming year. The site reskin of the desktop and mobile versions are also revealed to the Board.

IX. 2018/19 SMARI Recap Overview

Chapman/Burke

CEO Chapman shows quick review of the key components from the SMARI research. Burke dives into greater detail. More information will be provided at a future board meeting.

X. Discussion and Input on FY 2019/20CEO Performance Goals

Andy Chapman

CEO Chapman discusses the performance goals developed by he and Watson for the coming 2019/20 FY. Wants to target strategic goals other than the given visitor visitation. Some items will be duplicated from last year while others will be new goals. Final will be addressed at October Board meeting.

XI. Review of September 2019 Dashboard Report

Greg Long/Andy Chapman

Greg Long reviewed the highlights of September dashboard with input from CEO Chapman.

XII. Coop Departmental Reports

Andy Chapman

- a. Conference Sales (in packet)
- b. Leisure Sales (in packet)
- c. Website Content (in packet)
- d. Communications/Social (in packet)
- e. Advertising (in packet)

XIII. Management Reports

Staff

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- a. Operations Report (in packet)
- b. Business Development Manager Report (in packet)
- c. President/CEO (in packet)

XIV. Old Business

Michael Murphy

CEO Chapman discusses the short term rental policies and how we are trying to coordinate Placer County and Washoe county so the visitor is not confused by different regulations in the neighboring counties.

XV. New Business

Michael Murphy

CEO Chapman discusses a joint board meeting between the NLTRA and IVCBVB.
Heather Bacon wants to look at other options for the October Board meeting. October 23rd was offered.

XVI. Director Comments

Michael Murphy

None

XVII. PUBLIC COMMENT – Pursuant to NRS 241.020

Michael Murphy

This is the time for public to comment on any matter whether or not it is included on the Agenda of this meeting.

None

XVIII. Adjournment – (For Possible Action)

Suggested adjournment by Blane Johnson second by Heather Bacon. Adjourned. 5:02pm

Physically disabled persons desiring to attend should contact Greg Long at (775) 832-1606.
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2019 Advertising Effectiveness & ROI

July 2019

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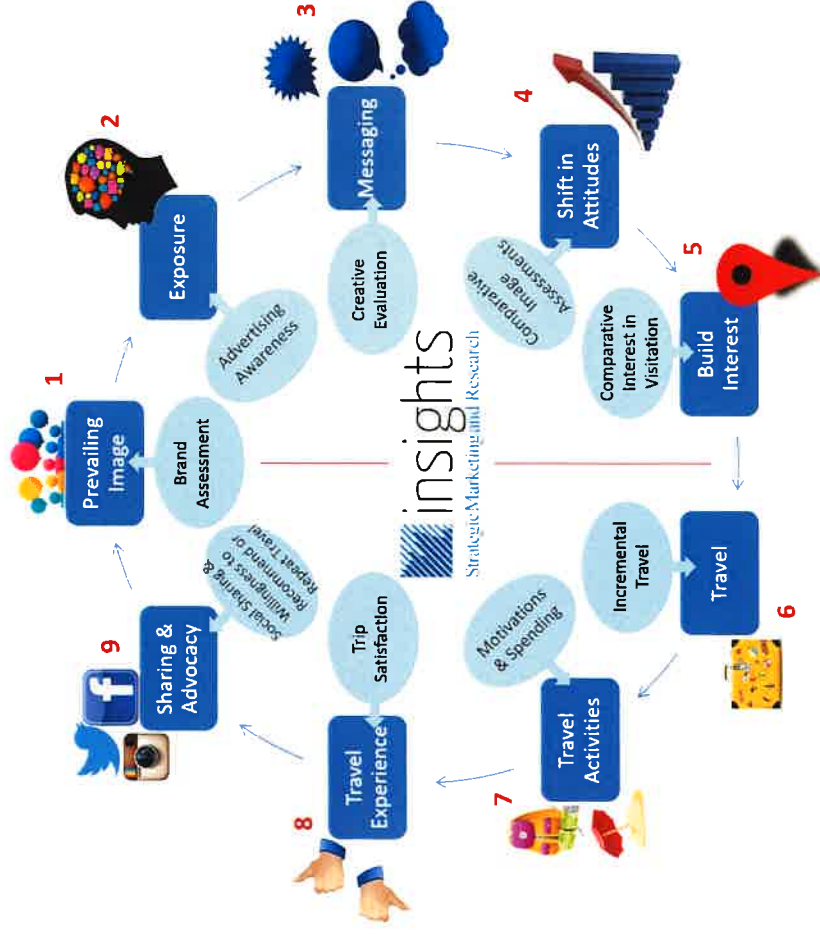
Background & Objectives

- As the marketing organization for the area, North Lake Tahoe Marketing Co-op (Co-op) 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 advertising designed to promote visitation throughout the fiscal year.
- A paid marketing campaign consisting of video, digital, and outdoor ads was placed in select markets between July 2018 and June 2019.
- The Co-op has again partnered with Strategic Marketing & Research Insights (SMARInsights) to evaluate advertising effectiveness.
- The research is designed to assess ad impact on image and travel, as well as to calculate an economic impact and ROI.
- 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;
 - Provides 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

- SMARInsights' advertising effectiveness methodology requires respondents to view the actual ads in an online survey environment in order to get a representative measure of aided ad awareness.
- National sample vendors provided a survey link to potential respondents in the Co-op's target markets.
- The Co-op placed media in Los Angeles, New York, San Francisco, Sacramento, Austin, San Diego, and Orange County. SMARInsights conducted 1,802 surveys in these markets in June 2019.
- 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.

Market	Completed Surveys
Los Angeles	351
New York	400
San Francisco	300
Sacramento	200
Austin	151
San Diego	200
Orange County	200
Total	1,802



Campaign Overview

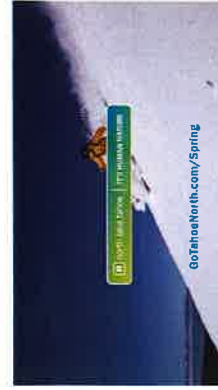
- The Co-op continued to run the “it’s human nature” advertising campaign, with some new executions.
- The Co-op invested about \$726,000 in consumer paid media in fiscal year 2018-2019. This includes advertising for the fall, winter, and spring/summer travel seasons.
- Video, digital banner, outdoor, social media, and digital native advertising were tested in this 2018-2019 research.
- Overall, the investment on the advertising tested is 14% smaller than in 2017-2018.

Medium	2017-2018	2018-2019
Video	\$82,425	\$53,542
Print	\$17,000	\$0
Digital (Banner, Social Media, Native)	\$564,203	\$561,191*
Outdoor	\$110,093	\$111,000
Radio	\$28,850	\$0
E-mail	\$43,286	\$0
Total	\$845,857	\$725,733 -14%

*2018-2019 digital includes:

- \$388,099 on digital banners
- \$137,248 on social media
- \$35,844 on native

Sample Video Ad



Sample Digital Banner Ad



Sample Outdoor Ad



Sample Social Media Ad



Sample Digital Native Ad



Insights

- The 2018-2019 consumer advertising campaign generated 32% awareness, reaching about 4.7 million households in the target markets.
- The Co-op spent \$0.16 to reach a household with the 2018-2019 advertising, which is on par with the 2017-2018 cost per aware household – and indicates a very efficient media buy compared to SMARInsights' industry norm of \$0.54.
- The digital banner advertising received the largest investment, and in turn generated the highest awareness (25%) of any medium.
- Advertising awareness is highest among younger consumers (Gen Z and Millennials). This result should be considered in light of targeting strategy, but it is also worth noting that SMARInsights consistently sees relatively high awareness among younger consumers. As media becomes more digital (and more fragmented), the ads are reaching the younger consumers who are heavier consumers of digital media.
- From an evaluative ratings/benchmarking standpoint, the 2018-2019 advertising excels (top 10% rating) at showing a place that is *good for the outdoors* and that is *good for a winter vacation*. The advertising is good (top 25% rating) at showing a place to *play, explore, escape, indulge, and recharge*.
- While excelling at communicating key messages, the 2018-2019 advertising receives just an average rating for making consumers want to visit North Lake Tahoe. It turns out that the older generations (Boomers and Silents) are suppressing this rating. Gen Z and Millennials give the ads strong ratings in this regard.
- Interestingly, while the ads make Gen Z and Millennials want to visit, these younger generations give the ads relatively low communication ratings. This could be due to the outdoor adventure product having more appeal with younger generations. Nonetheless, there is an opportunity to produce ads that have stronger communicative appeal to the younger generations – and stronger motivational appeal to the older generations.
- The Co-op should continue to feature the area's assets that motivate visitation, which include scenery, hikes, parks, skiing, and unique local culture.

Insights

- Half of those aware of the advertising recall seeing ads in at least four of the campaign media. In 2017-2018, just 29% recalled seeing ads in four or more media. Overlap is critical for generating advertising impact, as each medium plays a role at different phases of the consumer decision-making funnel, from brand building with video ads to finalizing the sale with digital ads. These various messages at various stages work synergistically to generate interest in visiting a destination.
- More overlap led to greater advertising impact, as the 2018-2019 advertising generated a travel increment of 2.7%, up from 1.6% in 2017-2018.
- Ultimately the 2018-2019 advertising influenced about 125,000 North Lake Tahoe trips, up from 84,000 trips influenced in 2017-2018. The ad-influenced trips in 2018-2019 translate to about \$205 million in visitor spending and a return of \$283 for each \$1 invested in the advertising. In 2017-2018, the ads influenced about \$154 million in visitor spending and returned \$182 for each \$1 invested.
- The 2018-2019 advertising generated the strongest levels of incremental travel in San Francisco, Austin, and Orange County. Last year, the ads did not influence travel from the then new Austin market. It appears that the ads have now had time to wear in and generate trips from this market. The ads did not influence additional travel from the new San Diego market. Perhaps the ads need time to wear in here, as they did in Austin. Sacramento continues to pose a challenge due to a relatively high level of unaware travel.
- Not only does the advertising influence the decision to visit, but it also gives visitors trip ideas, leading to more active, better trips and more social media advocacy. Overall, the advertising is performing well at all stages of the consumer decision-making process.

	2017-2018	2018-2019
Ad-influenced trips	84,101	124,831
Ad-influenced visitor spending	\$153,820,641	\$205,207,419
Return on investment	\$182	\$283



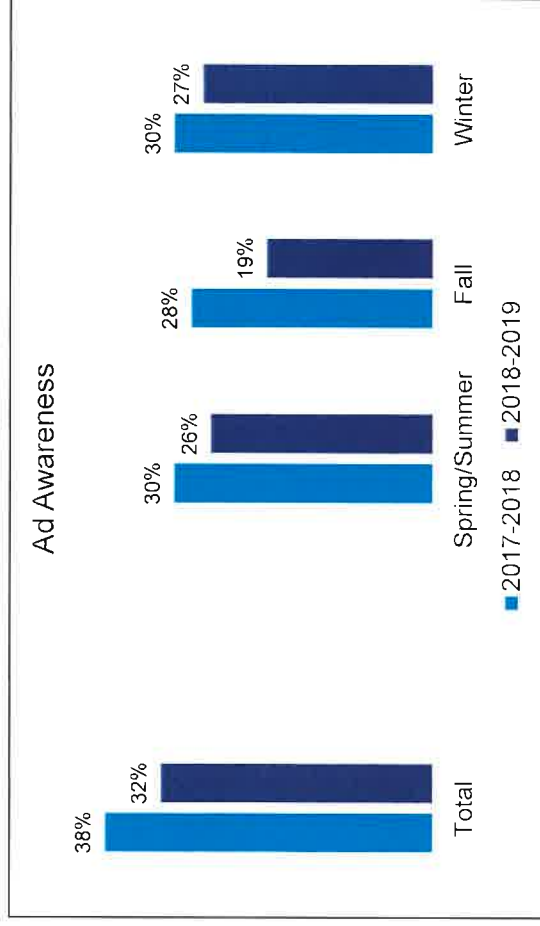
north lake tahoe

ADVERTISING AWARENESS

This section includes a review of aided advertising awareness, cost per aware household, and media overlap.



Ad Awareness & Cost per Aware Household



SMARInsights
Spot market
benchmark:
\$0.54 per
aware HH

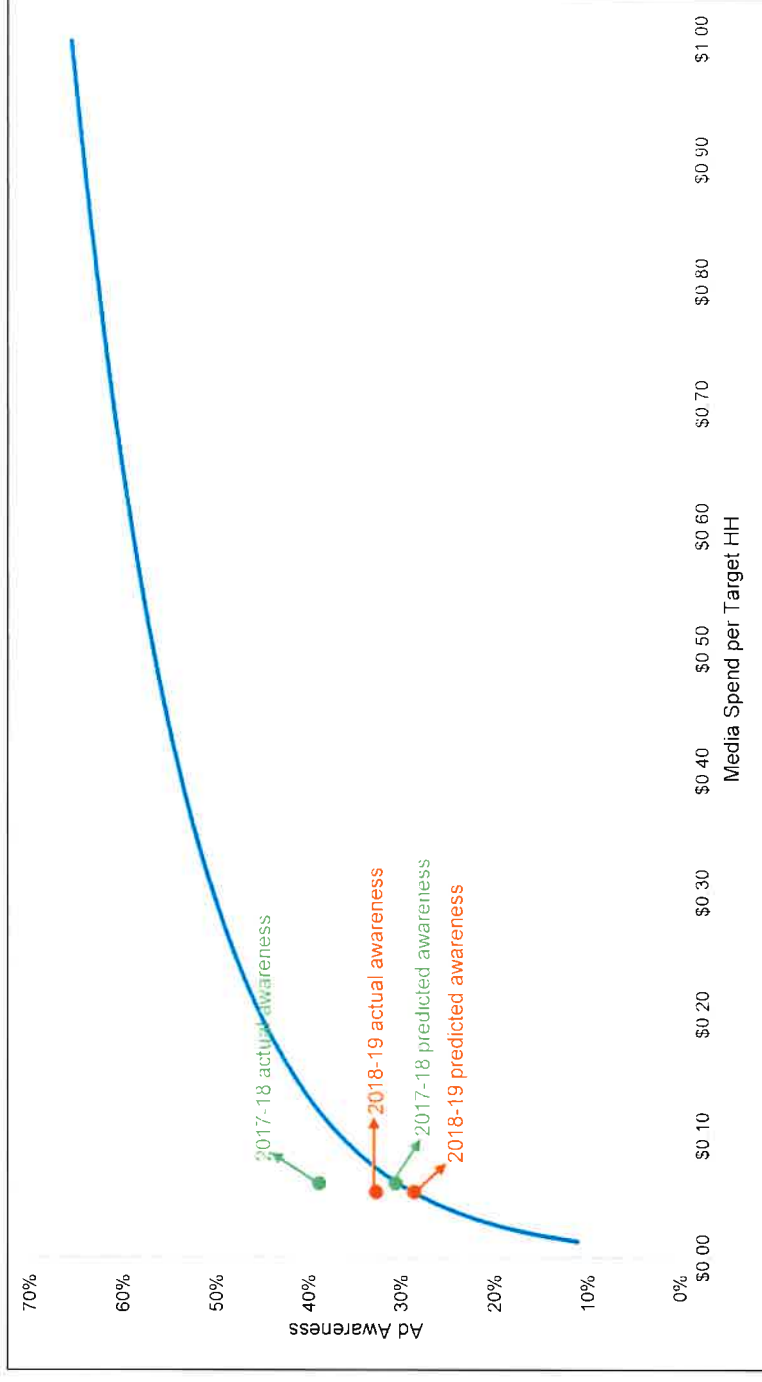
	2017-2018	2018-2019
Targeted HHs	13,971,616	*14,824,176
Recall	38%	32%
Households with Recall	5,297,031	4,670,986
Media Spending	\$845,857	\$725,733
Cost per Aware HH	\$0.16	\$0.16

*San Diego added

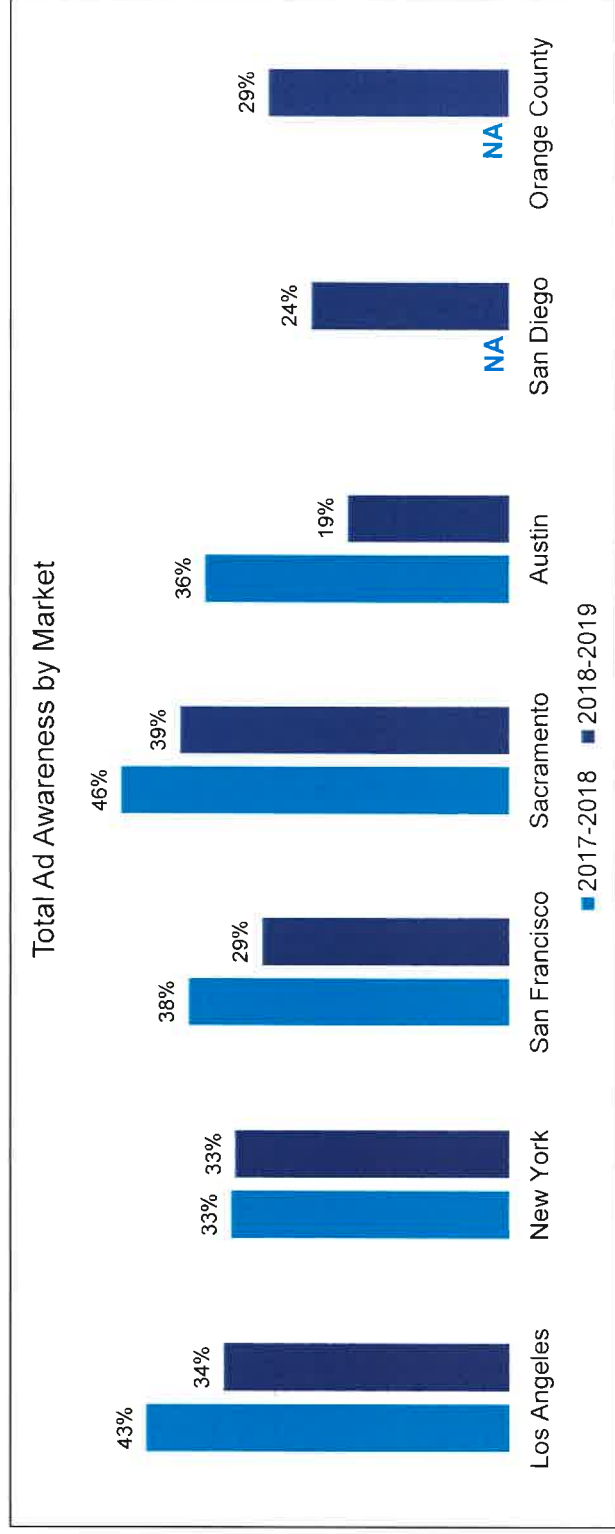
- The 2018-2019 advertising generated 32% awareness, reaching nearly 4.7 million households in the target markets. The level of ad awareness is down compared to the prior year, driven by a smaller investment.
- Through testing hundreds of destination advertising campaigns, SMARInsights has established benchmarks for the cost per ad-aware household. For comparable campaigns (non-state DMO, spot market strategy), the average cost per aware household is \$0.54. In 2018-2019, the Co-op spent \$0.16 per aware household, indicating another efficient media buy.

Awareness Modeling

- Another way to consider the efficiency of the media buy is to compare predicted awareness (based on media spending per household) to actual awareness.
- The curve in the chart is based on actual data from over 60 similar recent advertising campaigns.
- Based on this curve, we would expect the 2018-19 Lake Tahoe advertising to generate 28% awareness. Instead, actual awareness is 32%.
- Last year, predicted awareness was 30%, compared to 38% actual awareness.
- This suggests that the Co-op is implementing relatively efficient media buys.



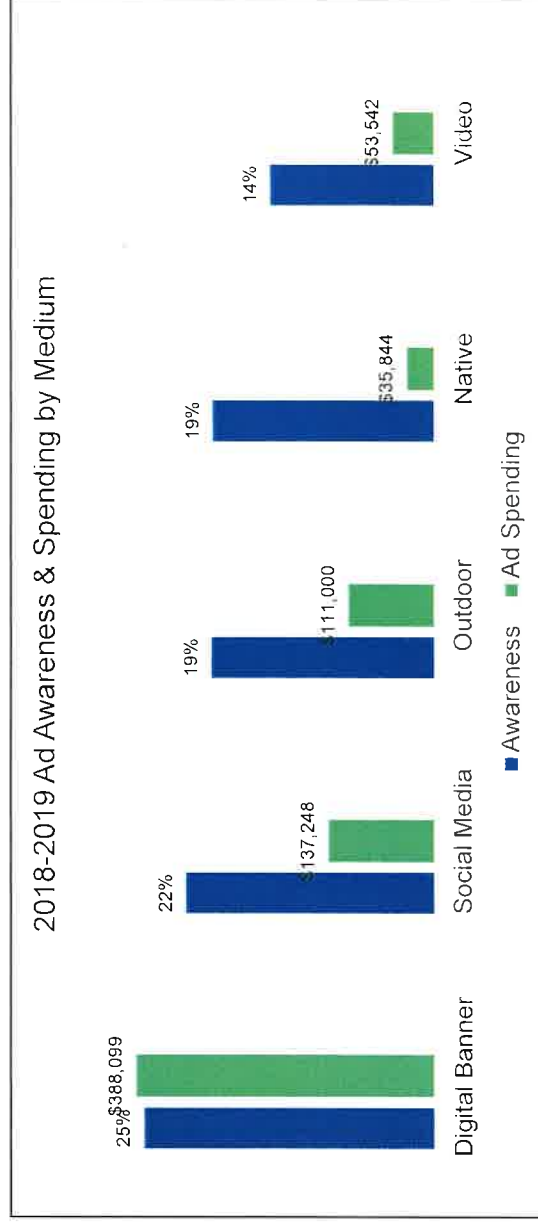
Ad Awareness by Market



- Total 2018-2019 ad awareness ranges from a high of 39% in Sacramento to a low of 19% in Austin.
- Ad awareness is down year-over-year in all markets except for New York.
- The ads reached 24% and 29% of consumers in the new San Diego and Orange County markets, respectively.

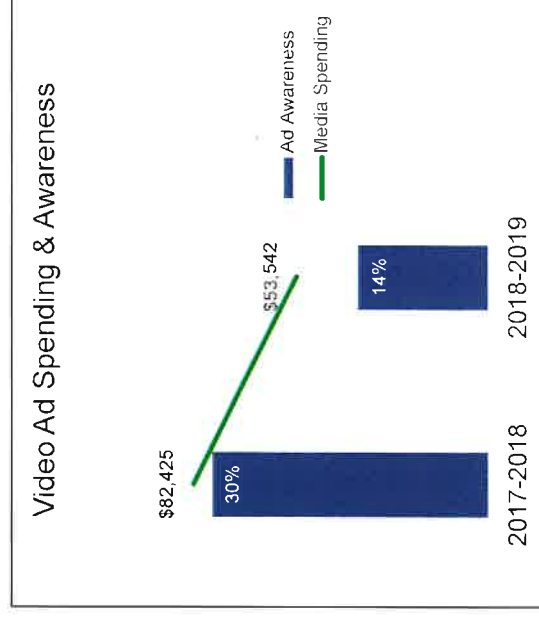
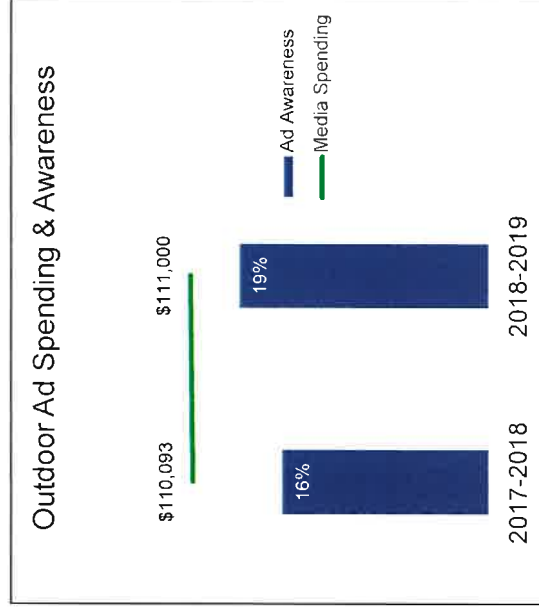
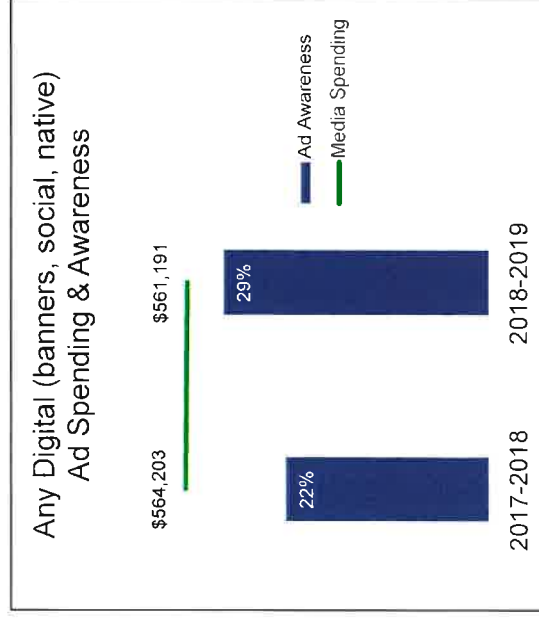
2018-2019 Ad Awareness by Medium

- The digital banner advertising received the largest investment, and in turn generated the highest awareness (25%) of any campaign medium.
- The modest \$53,542 video advertising investment led to this medium having the lowest level of awareness (14%).
- In terms of cost per aware household, the native advertising was the most efficient medium. But none of the ad media stand out for being inefficient.



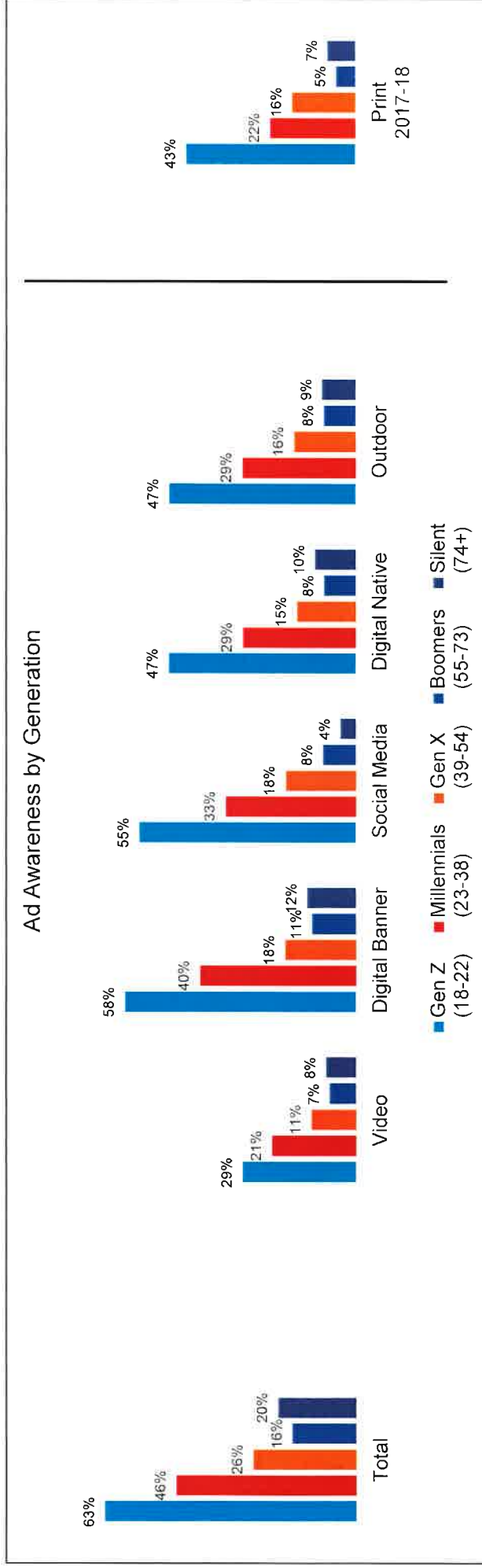
	Digital Banner	Social Media	Outdoor	Native	Video
Ad Awareness	25%	22%	19%	19%	14%
Ad Aware HHs	3,731,100	3,190,020	2,859,345	2,841,322	2,095,315
Media Spending	\$388,099	\$137,248	\$111,000	\$35,844	\$53,542
Cost per Aware HH	\$0.10	\$0.04	\$0.04	\$0.01	\$0.03

Change in Ad Awareness & Spending by Medium



- Awareness of the digital and outdoor advertising increased compared to the prior year, even with no additional investment. These ads have gained equity over their lifespan.
- Video ad awareness declined due to a smaller investment, but other forces are likely at play. Many DMOs are seeing video ad awareness declines in the face of larger or equivalent investments. Cord cutting and a myriad of streaming services have essentially eliminated the shared viewing experience and have made it more of a challenge to reach a broad audience. But video advertising is a critical DMO brand-building medium and should not be eliminated because of this challenge. Rather, targeting opportunities provided by the fragmentation should be explored and leveraged.

2018-2019 Ad Awareness by Medium by Generation



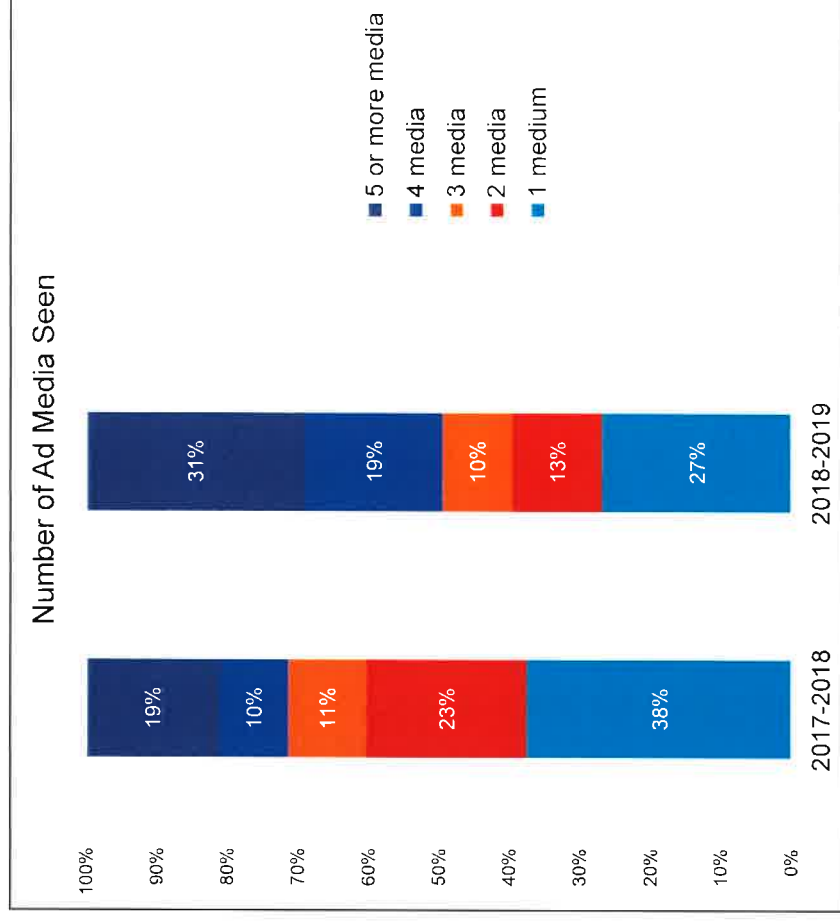
- Another industry trend is higher levels of ad awareness among younger consumers.
- This is clearly the case with the 2018-2019 North Lake Tahoe advertising. As media becomes more digital (and more fragmented), the ads are reaching the younger consumers who are heavier consumers of digital media. However, it should be noted that sample sizes for the youngest and oldest generations are relatively small and have wide margins of error.
- It is also interesting to note that in 2017-2018 print ad awareness is relatively high among the younger generations. Print is typically a more traditional medium with less readership among younger consumers. This result could be driven by the similarity of the creative execution across media (i.e. the print ad resembles the digital, video, and outdoor ads).



V-14

Media Overlap

- Media overlap is mission-critical for generating advertising impact. Each campaign medium plays a role at different phases of the consumer decision-making funnel, from brand building with video ads to finalizing the sale with digital ads. These various messages at various stages work synergistically to generate interest in visiting a destination.
- While overall awareness declined in 2018-2019, of those who recall seeing any ads the level of media overlap is much greater this year. Almost a third (31%) of those aware of any 2018-2019 ad recall seeing ads in all five media. In 2017-2018, just 19% recalled seeing ads in five or more media.
- Greater media overlap generally foreshadows greater advertising impact.



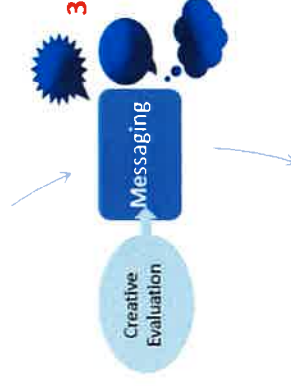
V-15



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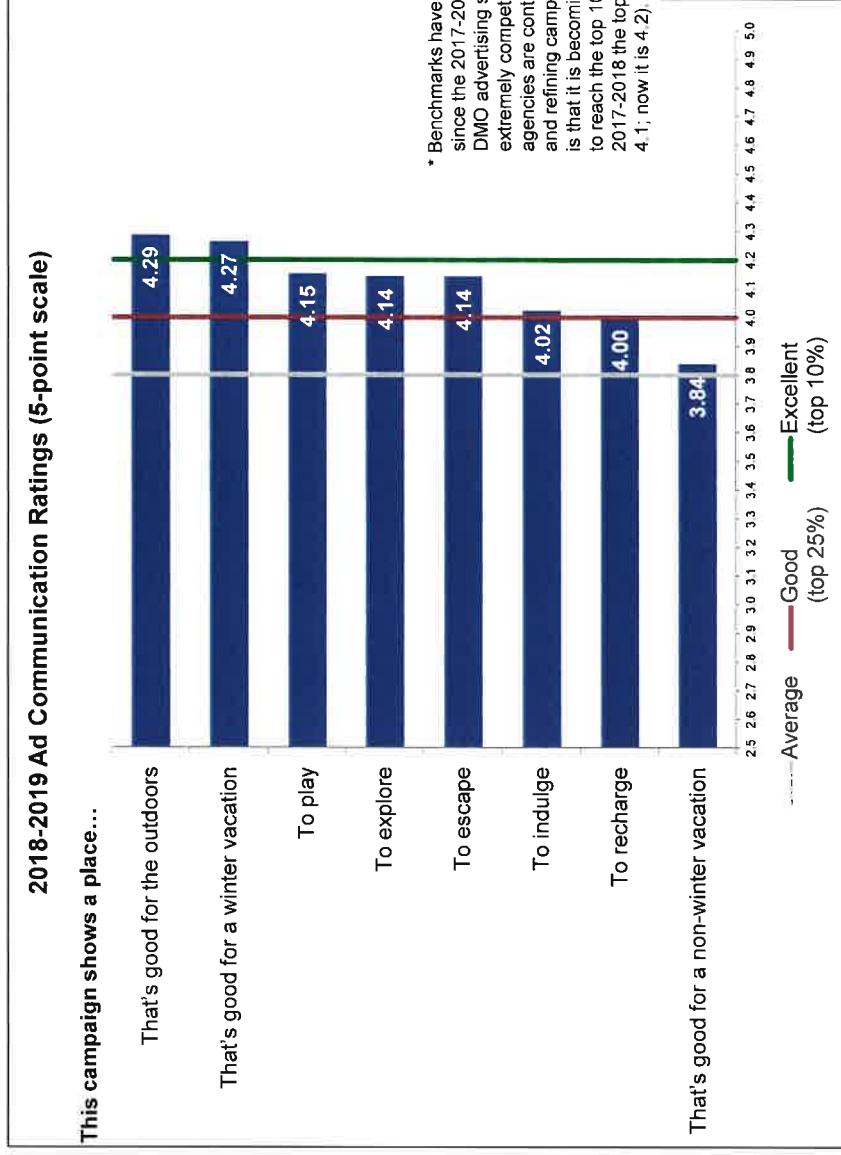
CREATIVE EVALUATION

This section includes a review of respondents' reactions to the advertising campaign.



2018-2019 Creative Communication Ratings

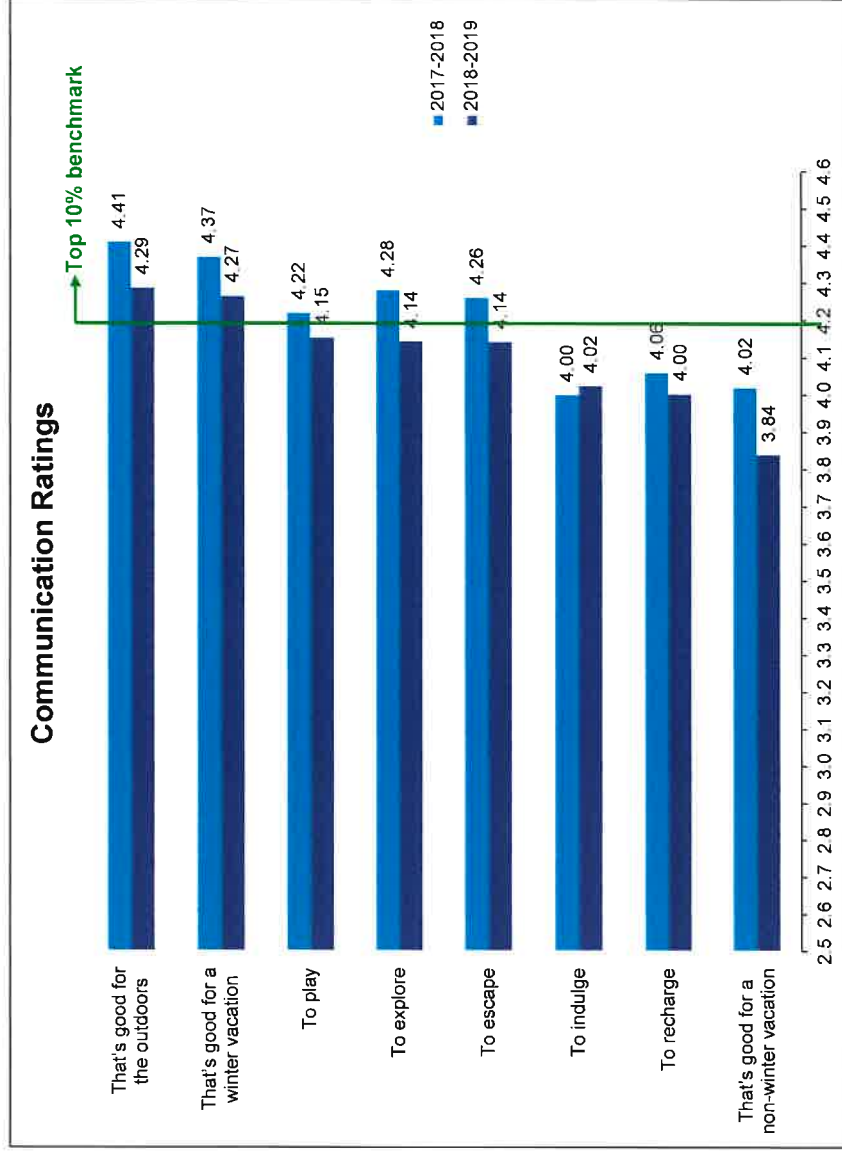
- The 2018-2019 advertising campaign excels at showing a place that is *good for the outdoors* and that is *good for a winter vacation*.
- The advertising is good at showing a place to *play, explore, escape, indulge, and recharge*.
- While the advertising is not as strong at showing a place that is *good for a non-winter vacation*, it is still above-average from an industry benchmarking standpoint.



(1-1)

Communication Ratings Change

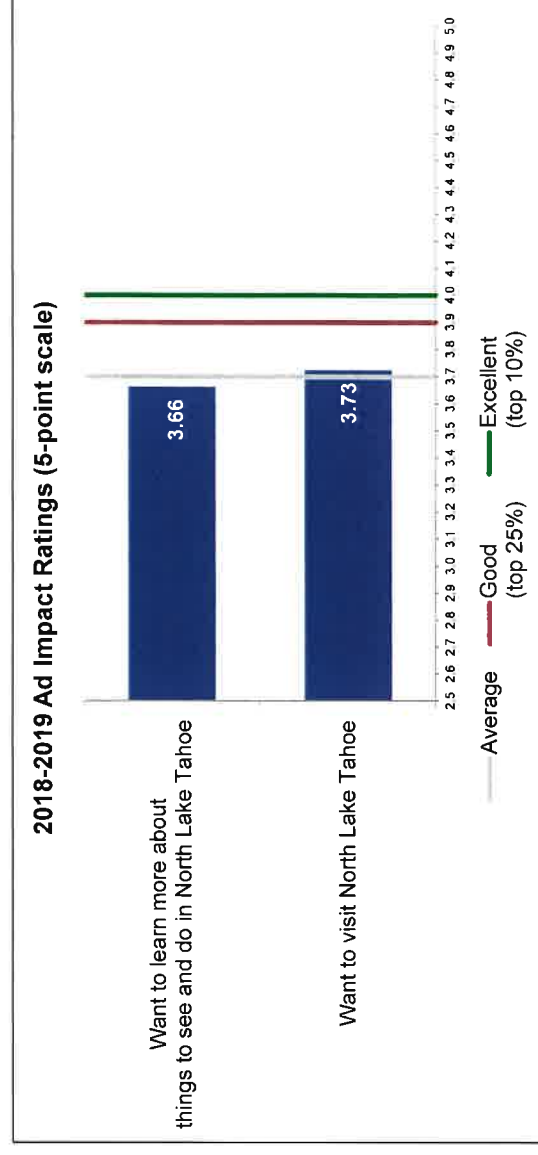
- Compared to last year, the communication ratings show some declines. The differences are not statistically significantly different, so from that standpoint they are essentially unchanged. However, when considering SMARInsights' industry benchmark there are some notable changes: Last year the ads rated in the top 10% range for showing a place to *play*, *explore*, and *escape*. This year the ads fall just short of this "excellent" threshold.
- An aging campaign is a potential reason for the directional declines. Destination advertising will often generate initial excitement, which can wear off quickly. This is not to suggest that the campaign has "worn out," but it could indicate that the honeymoon period is over and that we would not expect a rebound next year absent some sort of creative refresh.



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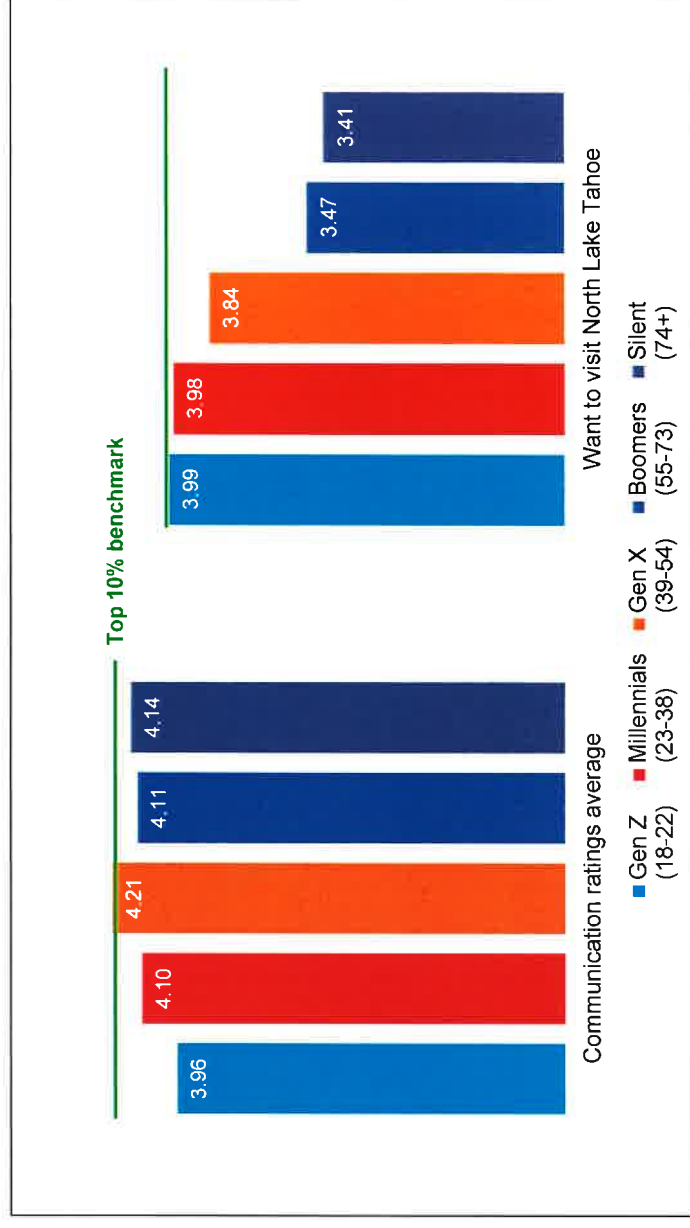
2018-2019 Creative Impact Ratings

- The 2018-2019 advertising receives average ratings for making consumers *want to learn more about* and *want to visit* North Lake Tahoe.
- The fact that the ads are “excellent” or “good” at communicating the intended messages, but just average at generating interest in visiting the area warrants further review, which is found on the following slide.



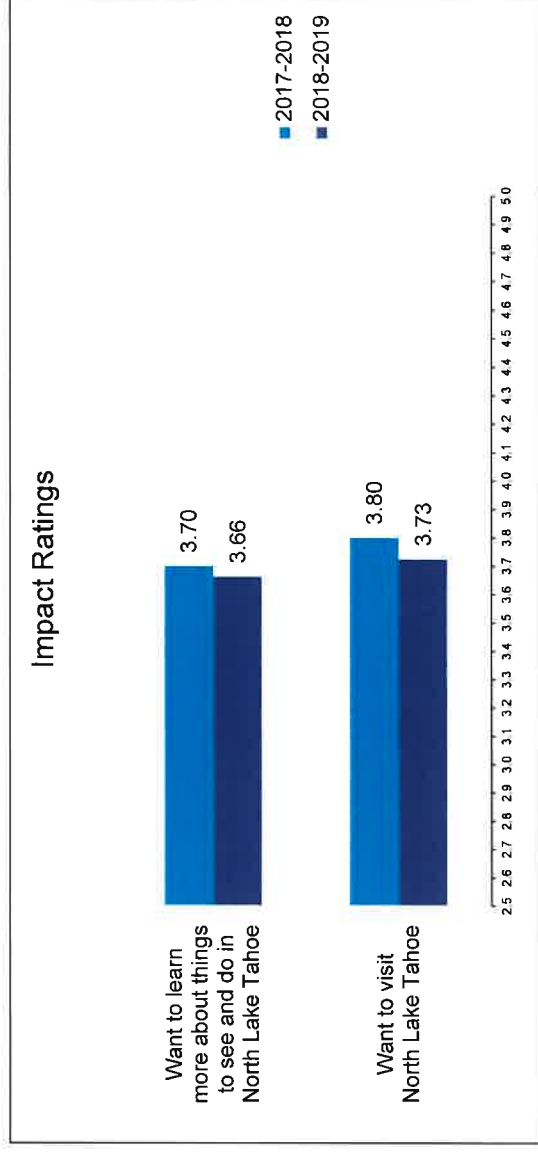
2018-2019 Ad Ratings by Generation

- The older generations are suppressing the ads' rating for *make me want to visit North Lake Tahoe*. Gen Z and Millennials rate the ads just below the excellent threshold for generating interest in visiting, while Boomers and Silents rate the ads well below average.
- It's also interesting that Gen Z and Millennials give the ads relatively low ratings for the communication attributes, while at the same time giving the ads relatively high ratings for the impact attributes.
- This could be because the outdoor adventure product is more appealing to younger generations.
- Nonetheless, there is clearly an opportunity to produce ads that have stronger communicative appeal to the younger generations – and stronger motivational appeal to the older generations.



Impact Ratings Change

- The year-over-year result is similar for the campaign impact ratings – the ratings declined slightly, but the differences are not statistically significant – and the ratings are still in the average range.

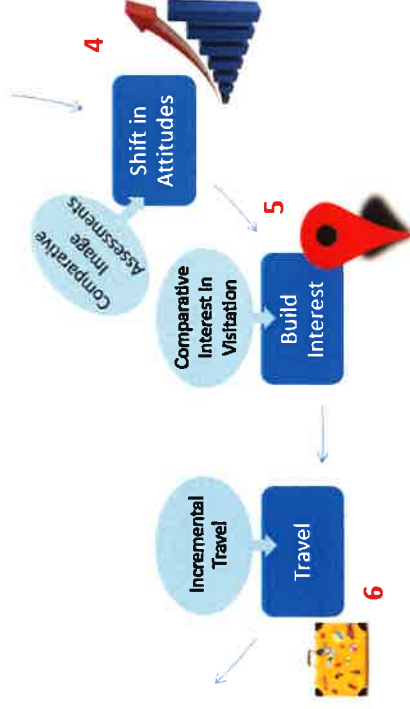




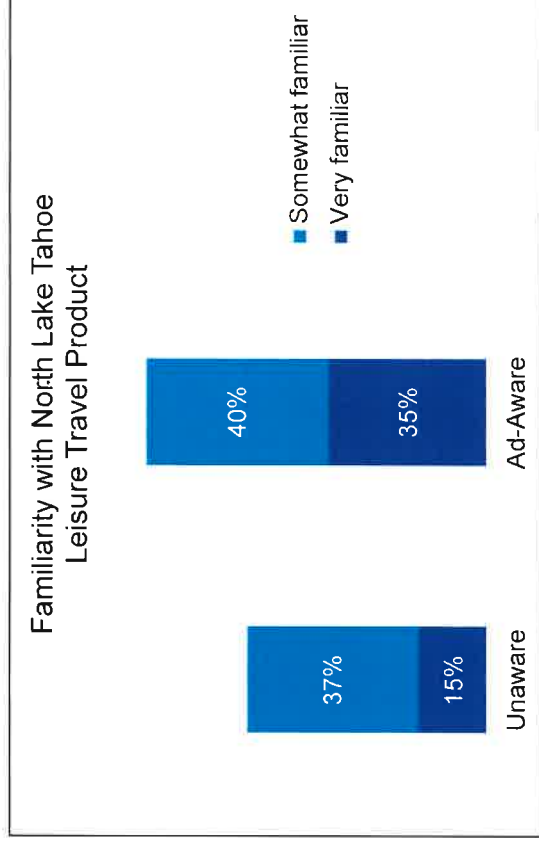
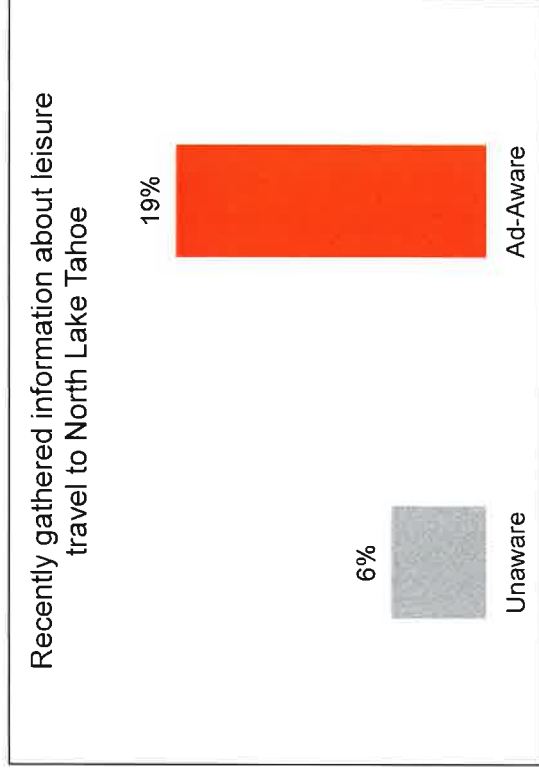
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ADVERTISING IMPACT

Advertising impact is evaluated by comparing the attitudes and behaviors of those not aware of the advertising to the attitudes and behaviors of those aware of the advertising.



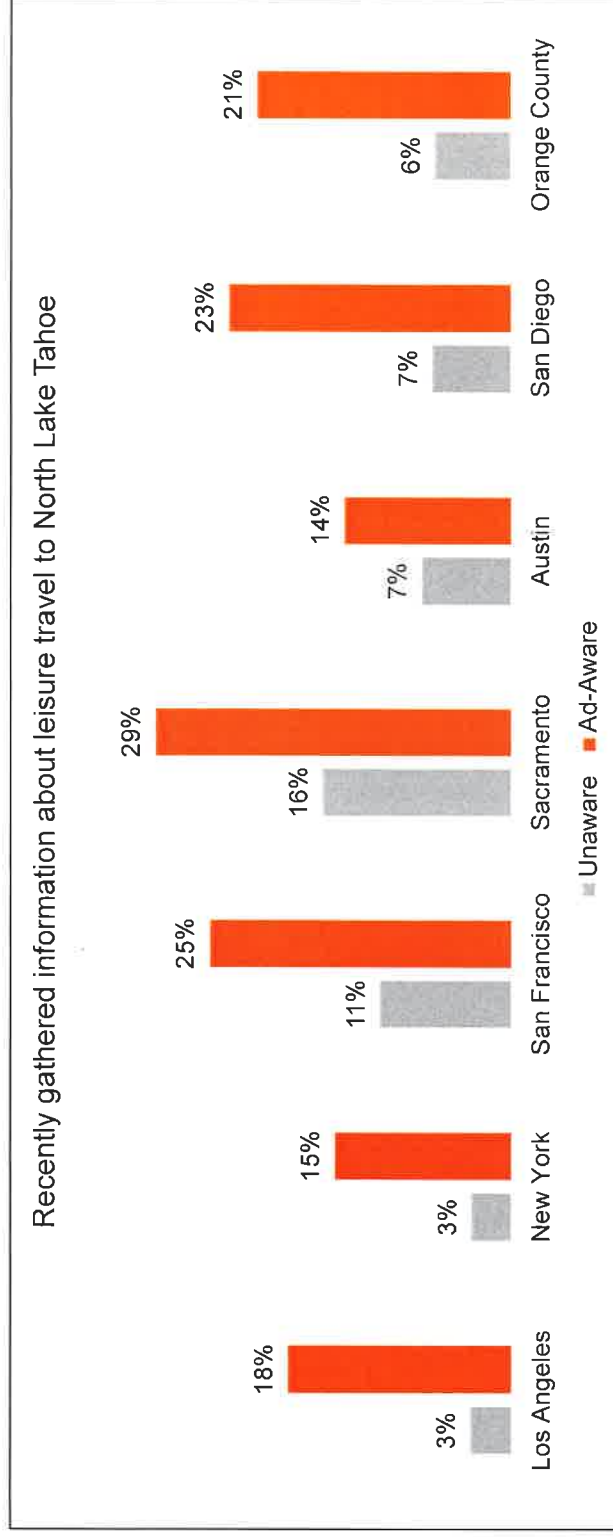
Ad Impact on Information Gathering & Familiarity



- The advertising prompts information gathering and helps to familiarize consumers with the North Lake Tahoe leisure travel product. Those aware of the ads are about three times as likely as those not aware of the ads to have recently gathered information about North Lake Tahoe. Industry-wide, the ad impact on information gathering is closer to two-fold.
- While positive, it is possible this to some degree reflects a retargeting effort, reaching consumers with the advertising after they have interacted with owned media.

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Ad Impact on Information Gathering by Market



- The advertising has a positive impact on information gathering in all target markets.

18-24

Ad Impact on Perceptions of North Lake Tahoe

Mean rating on 5-point scale

	Unaware	Ad-Aware	Difference
Beer and wine trails	3.36	3.89	0.52
Gaming	3.41	3.84	0.43
Beaches	3.21	3.64	0.43
Live music	3.50	3.91	0.41
Spas	3.55	3.94	0.39
Value	3.52	3.89	0.37
Crowding on the mountain	3.34	3.71	0.37
Family programs	3.60	3.97	0.37
Easy to get to	3.47	3.83	0.37
Shopping	3.46	3.79	0.33
Service	3.72	4.03	0.30
Convenience of getting around the region	3.56	3.84	0.29
Off-hill activities	3.66	3.94	0.28
Golf	3.42	3.68	0.26
Dining	3.82	4.07	0.25
Biking	3.71	3.96	0.24
Après ski activities and nightlife	3.77	3.98	0.21
Atmosphere	4.01	4.21	0.20
Water activities (kayaking, paddle boarding, rafting, etc.)	3.88	4.07	0.19
Weather	3.90	4.07	0.18
Lodging	3.93	4.08	0.15
Hiking	4.02	4.14	0.12
Snow quality	4.02	4.14	0.12
Cross country skiing	3.83	3.91	0.08
Skiing/snowboarding	4.08	4.10	0.02
Scenery	4.42	4.40	-0.02

Differences above the orange line are statistically significant

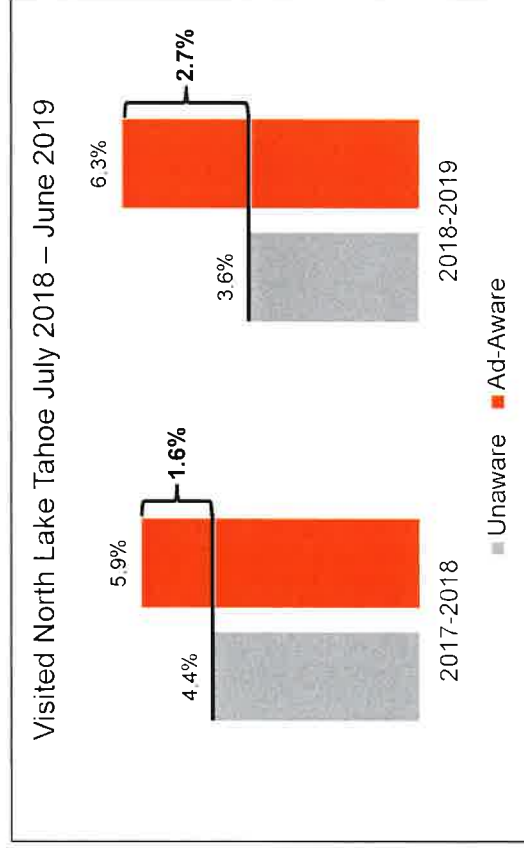
- The advertising helps to build specific perceptions of North Lake Tahoe.
- While some of these activities and attractions might not be features in the advertising, remember that the advertising also prompts information gathering, which can lead consumers to information sources that do showcase these aspects of the area.
- There is no impact on *scenery*, but North Lake Tahoe has little room for improvement on this attribute.

Incremental (Ad-Influenced) Travel Calculation

- 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 conservative measure of influence.



Incremental Travel & Ad-Influenced Trips



	2017-2018	2018-2019
Qualified HHs	13,971,616	*14,824,176
Ad Awareness	38%	32%
Ad Aware HHs	5,297,031	4,670,986
Increment	1.6%	2.7%
Ad-Influenced Trips	84,101	124,831

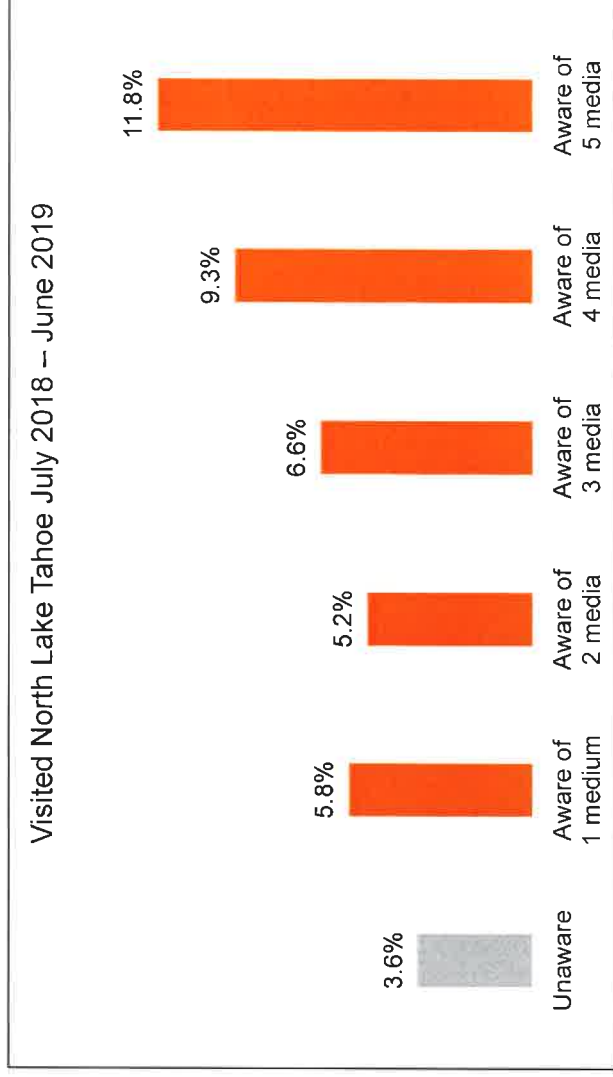
*San Diego added

- The 2018-2019 advertising ultimately influenced North Lake Tahoe travel that would not have occurred otherwise. In fact, the level of advertising impact is greater this year than last. The reader will recall that the 2018-2019 media buy generated a relatively high level of media overlap, which foreshadowed this result. The following slide shows the impact of multiple ad media exposure on North Lake Tahoe travel.
- The level of incremental travel translates into about 125,000 ad-influenced North Lake Tahoe trips between July 2018 ad June 2019, up from about 84,000 ad-influenced trips between July 2017 and June 2018.
- Incremental travel results by target market can be found in the Appendix.

18-1

Media Overlap Impact

- The impact of the advertising increases sharply when consumers are exposed to four or more ad media.



✓-28

ROI

- Applying average visitor spending to the quantity of ad-influenced trips shows that the 2018-2019 advertising generated about \$205 million in visitor spending, up from \$154 million in 2017-2018.
- Average visitor spending is down this year, which is to some degree driven by a relatively large percentage (37%) of ad-influenced trips coming from the nearby San Francisco market, which produces shorter trips than the more distant markets.
- The 2018-2019 advertising returned \$283 for each \$1 invested, up from the \$182 ROI generated last year.

	2017-2018	2018-2019
Ad-Influenced Trips	84,101	124,831
Avg. Trip Spending	\$1,829	\$1,644
Ad Influenced Trip Spending	\$153,820,641	\$205,207,419
Media Spending	\$845,857	\$725,733
ROI	\$182	\$283

6-29

Ad-Influenced Paid Lodging Nights

- Applying the incidence of paid lodging usage, along with average trip length, we see that the 2018-2019 advertising influenced about 320,000 paid lodging nights, up from 248,000 in 2017-2018.
- The rate of paid lodging usage is down this year, which is driven by a relatively large percentage of ad-influenced trips coming from the nearby San Francisco market (see Appendix – Ad-Influenced Trips by Market) from which visitors are more likely to stay with family or friends.

	2017-2018	2018-2019
Ad-Influenced Trips	84,101	124,831
% of ad-aware trips with paid lodging	89%	81%
Ad-influenced trips with paid lodging	75,063	101,399
Avg. nights per trip	3.3	3.2
Ad-influenced paid lodging nights	247,709	320,382

Ad-Influenced Sales Tax & Lodging Tax

- With a total sales tax rate of 7.48%, the 2018-2019 advertising influenced about \$15.4 million in sales tax revenue, up from \$11.6 million in 2017-2018.
- With average lodging spending of \$302, and a lodging tax rate of 10.7%, the 2018-2019 advertising influenced about \$3.3 million in lodging taxes, up from \$2.4 million in 2017-2018.

Sales Tax		California	Nevada	Total
% of overnights		77%	23%	100%
Ad-influenced visitor spending		\$158,610,149	\$46,597,270	\$205,207,419
State and local sales tax rate		7.25%	8.27%	7.48%
Ad-influenced state and local sales tax		\$11,499,236	\$3,851,264	\$15,350,500
Lodging Tax		California	Nevada	Total
% of overnights		77%	23%	100%
Ad-influenced trips with paid lodging		78,374	23,025	101,399
*Average lodging spend		\$302	\$302	\$302
Ad-influenced lodging spending		\$23,669,014	\$6,953,599	\$30,622,613
Lodging tax rate		10.0%	13.0%	10.7%
Ad-influenced lodging tax		\$2,366,901	\$903,968	\$3,270,869
Total ad-influenced sales and lodging taxes		\$13,866,137	\$4,755,232	\$18,621,369

* DestiMetrics total fiscal year average (July – June)

** Tax rate differs due to different distribution of ad-influenced over nights across California/Nevada

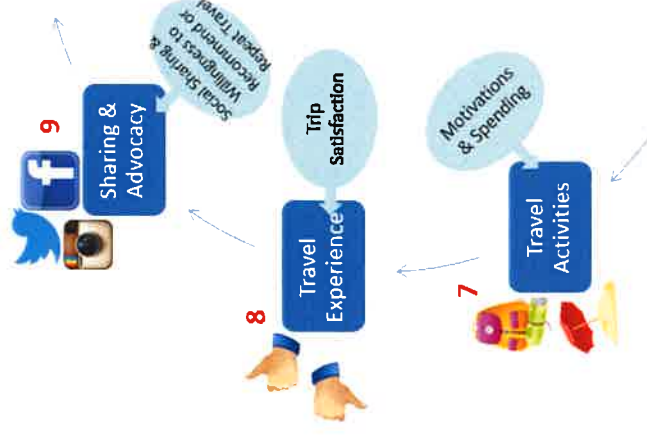
	2017-2018 Total	2018-2019 Total
Ad-influenced visitor spending	\$153,820,641	\$205,207,419
**State and local sales tax rate	6.83%	7.48%
Ad-influenced sales tax	\$11,601,256	\$15,350,500
Ad-influenced trips with paid lodging	75,063	101,399
*Average lodging spend	\$291	\$302
Ad-influenced lodging spending	\$21,843,333	\$30,622,613
Lodging tax rate	10.7%	10.7%
Ad-influenced lodging tax	\$2,373,060	\$3,270,869
Media spending	\$845,857	\$725,733
Sales tax ROI	\$13.72	\$21.15
Lodging tax ROI	\$2.81	\$4.51



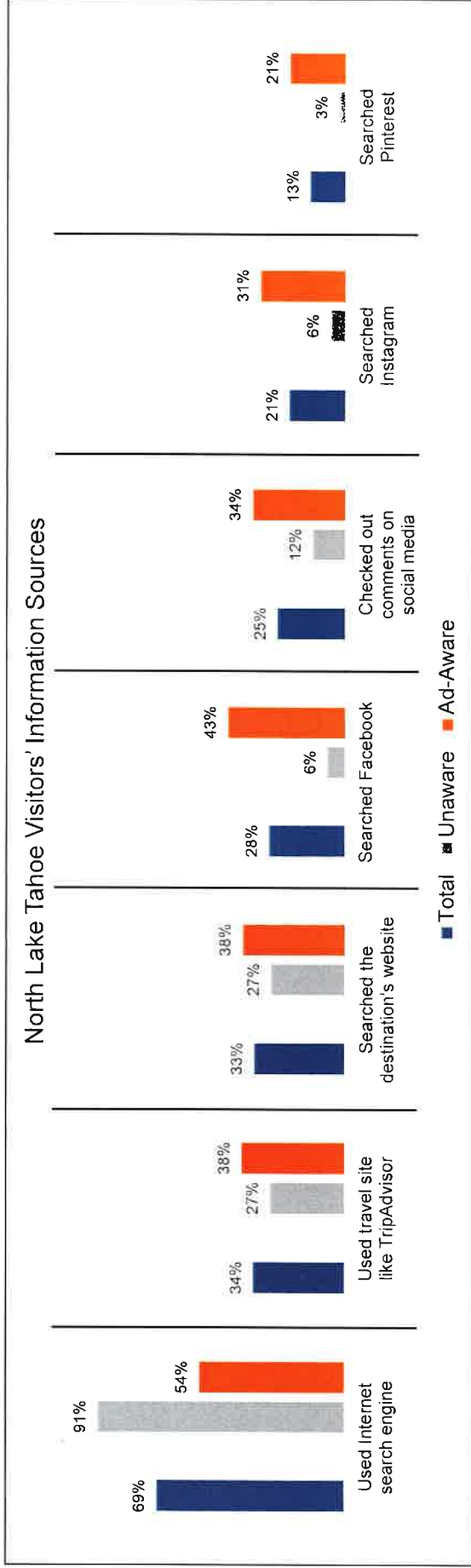
north lake tahoe

TRIP SPECIFICS & AD IMPACT

This section includes a review of North Lake Tahoe trip specifics as well as advertising impact on the trip. Effective advertising not only influences the decision to visit, but also gives visitors ideas of things to do, which leads to more active, better trips and more advocacy.

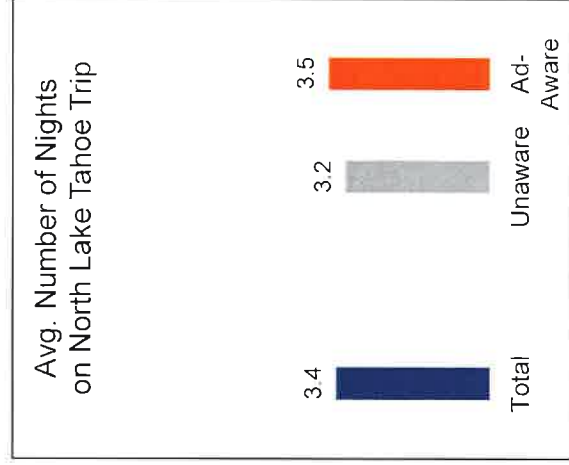
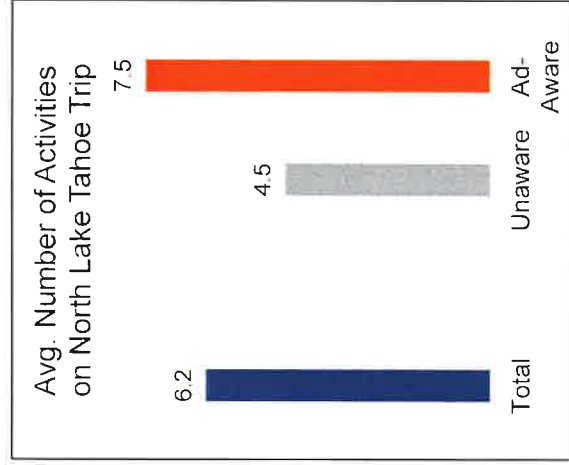


Trip Information Gathering



- Overall, search engines are the top source for North Lake Tahoe trip information gathering.
- Visitors are also likely to use TripAdvisor, the website, Facebook, Instagram, and social media comments in general.
- The ads are driving visitors to TripAdvisor, the website, and social media outlets.

Trip Length & Activities



	Total	Unaware	Ad-Aware	Difference
Experiencing the unique culture of the area	20%	10%	27%	17%
Visiting a national park, forest or monument	18%	9%	25%	16%
Entertainment and nightlife	24%	18%	28%	10%
Hiking	22%	18%	26%	8%
Visiting small towns and rural areas	20%	17%	23%	6%
Festivals (music, arts, food, etc.)	10%	8%	12%	4%
Scenic drives	34%	33%	35%	3%
Viewing and enjoying natural scenery such as mountains, lakes, etc.	34%	33%	35%	2%

- The advertising showcases some of the best North Lake Tahoe activities and attractions, leading the ad-aware visitors to have more active and longer trips than the unaware visitors.
- The table shows some of top activities that the ads have a relatively strong impact on.

North Lake Tahoe Activity Classification

Paid Media Marketing (Large Audience, Strong Motivation)
Sightseeing
Nature walks
Shopping
Scenic drives
Viewing and enjoying natural scenery such as mountains, lakes, etc.
Entertainment and nightlife
Hiking
Experiencing the unique culture of the area
Visiting a national park, forest or monument
Skiing

Niche Marketing (Small Audience, Strong Motivation)
Camping
Tubing
Festivals (music, arts, food, etc.)
Boating
Gondola rides
Snowshoeing
Snowboarding
Rock climbing
Backcountry skiing
Scenic helicopter
Cross country skiing
The Ale Trail

In-Destination Marketing (Large Audience, Weak Motivation)
Fine dining or eating at unique local restaurant
Visiting small towns and rural areas
Wildlife watching
Visiting historical sites
Visiting a spa

Less Marketing Potential (Small Audience, Weak Motivation)
Fishing
Paddle boarding
Yoga
Backpacking / mountaineering
Road biking
Ice skating
Fall colors
Kayaking
Arts, culture activities such as museums, theater performances
Sledding
Off-roading
Mountain biking
Visiting geological formations unique to the area
Fat biking
Snowmobiling
Whitewater rafting
Golf
Parasailing
Attending or participating in sporting events or competition
Horseback riding
Snowcat tour
Dogsledding

- A way to classify and prioritize North Lake Tahoe trip activities is to consider rates of participation and motivation. The activities that have relatively high rates of both are the top candidates for inclusion in paid media marketing. These are shown in the green table above.
- The activities that are more suited to niche marketing are those with low rates of participation, but strong motivation. These are shown in the blue table.
- Activities with high rates of participation but that are not particularly motivating are more suited to in-destination marketing, giving visitors ideas of extra things to do.
- Some activities have less marketing potential given low rates of participation and motivation, as shown in the gray table. This is not to say that these activities should not be used in advertising, but they probably shouldn't be the focus of the ad. For example, an ad showcasing a paddle boarder in beautiful and dramatic scenery would work – but an ad focusing solely on paddle boarding would be less effective.



north lake tahoe

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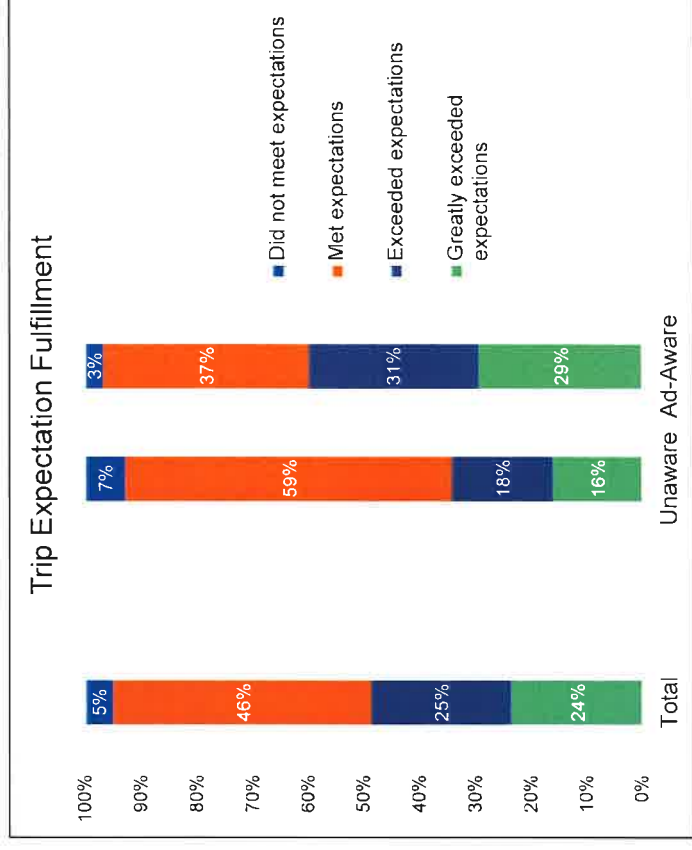
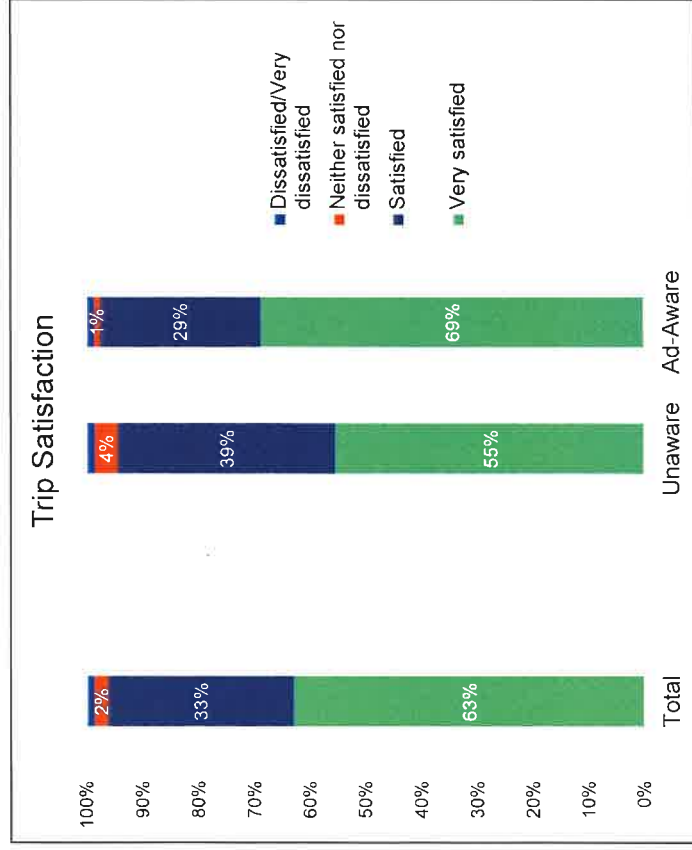
North Lake Tahoe Activity Classification Shifts

- There is almost no change in terms of the activities that offer the greatest potential for paid media marketing (shopping moved into this category, while historical sites moved out).
- Several activities did shift from “niche marketing” to “less marketing potential.”

Activity	Now	Was
Shopping	Paid Media Marketing	In-Destination Marketing
Festival (music, arts, food, etc.)	Niche Marketing	In-Destination for summer Less Marketing Potential for winter
Rock climbing	Niche Marketing	Less Marketing Potential
Scenic helicopter	Niche Marketing	Less Marketing Potential
The Ale Trail	Niche Marketing	Less Marketing Potential
Visiting historical sites	In-Destination Marketing	Paid Media Marketing for summer Less Marketing Potential for winter
Fishing	Less Marketing Potential	Niche Marketing
Backpacking/mountaineering	Less Marketing Potential	Niche Marketing
Fall colors	Less Marketing Potential	In-Destination Marketing
Kayaking	Less Marketing Potential	Niche Marketing
Sledding	Less Marketing Potential	Niche Marketing
Visiting geological formations	Less Marketing Potential	In-Destination Marketing
Snowmobiling	Less Marketing Potential	Niche Marketing
Whitewater rafting	Less Marketing Potential	Niche Marketing
Golf	Less Marketing Potential	Niche Marketing
Parasailing	Less Marketing Potential	Niche Marketing
Sporting events	Less Marketing Potential	Niche Marketing
Dogsledding	Less Marketing Potential	Niche Marketing

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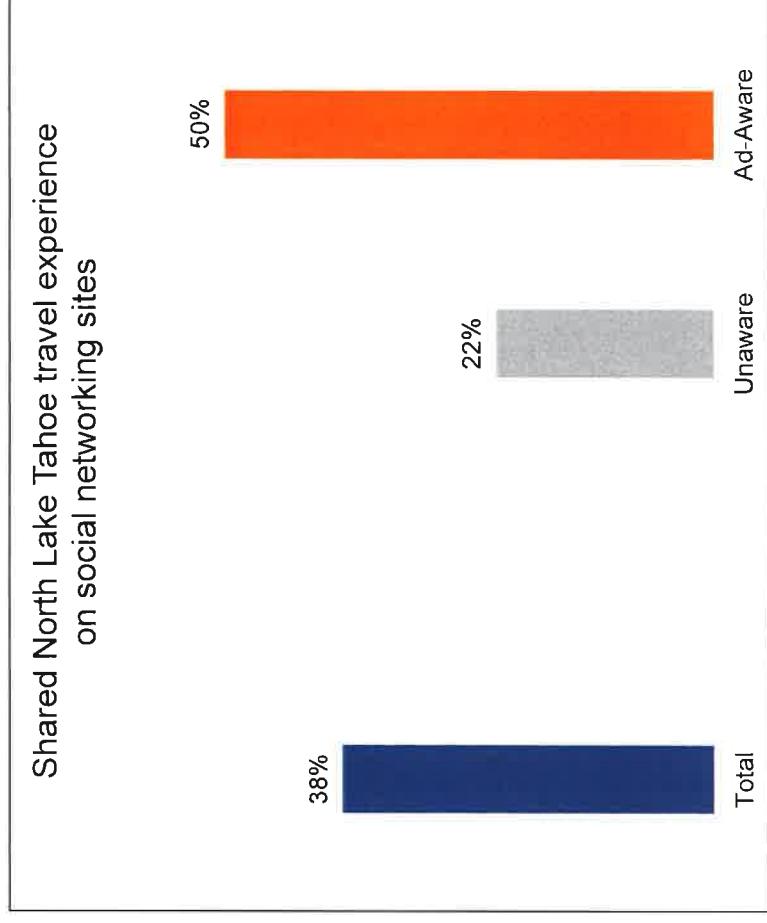
Trip Satisfaction



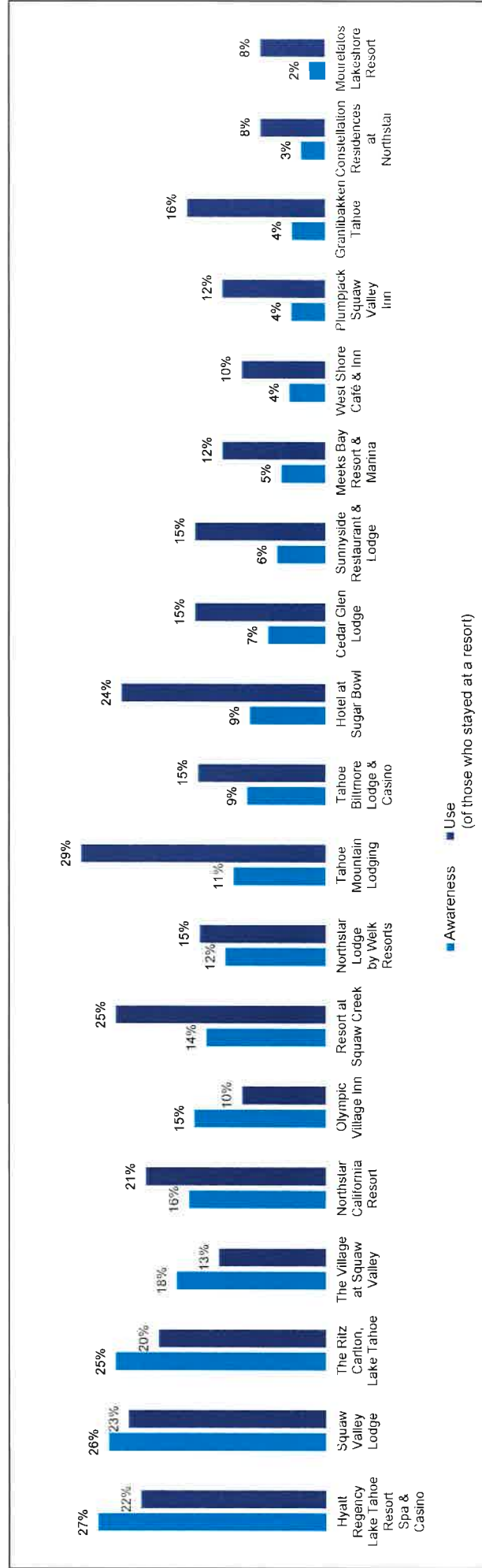
- Most North Lake Tahoe visitors are satisfied with their trip (63% “very satisfied,” 33% “satisfied”). Most also feel that the trip at least met their expectations.
- Those aware of the advertising, who had more active trips, are more satisfied and are more likely to say that the trip exceeded their expectations.

Social Media Advocacy

- Almost 4 in 10 North Lake Tahoe visitors indicate sharing their trip on any social networking sites.
- Those aware of the ads are more than twice as likely as those not aware of the ads to share their trip.



Resort Awareness & Selection



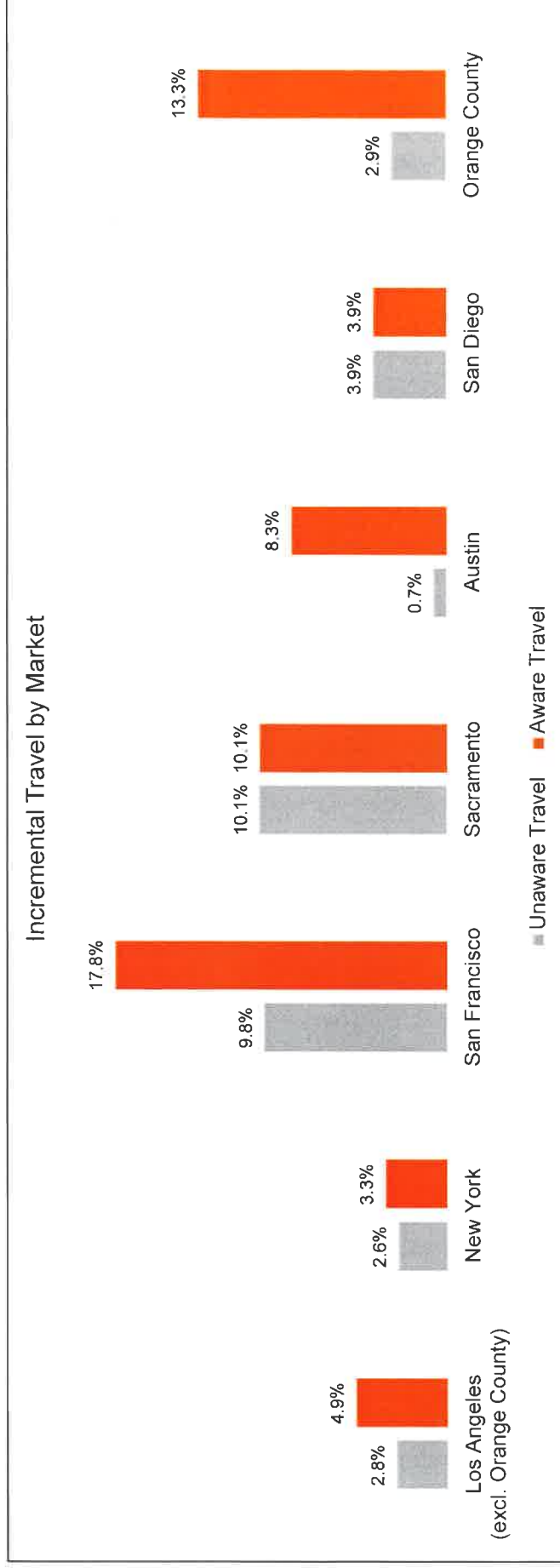
- Finally, a survey question was added to gauge awareness of a set of North Lake Tahoe resorts among all consumers (not just visitors).
- Three resorts stand out for having the highest levels of awareness (Hyatt Regency, Squaw Valley, and Ritz Carlton).
- The survey also asks visitors who stayed at a resort which resort(s) they chose. The chart shows that awareness & selection don't necessarily align, but it should be noted that the sample size of resort-using visitors (23) is fairly small and the results should accordingly be viewed with caution.



north lake tahoe

APPENDIX: AD-INFLUENCED TRIPS BY MARKET

Incremental Travel by Market



- The 2018-2019 advertising generated the strongest levels of incremental travel in San Francisco, Austin, and Orange County.
- Last year, the ads did not influence travel from the then new Austin market. It appears that the ads have now had time to wear-in and generate trips from this market.
- The ads did not influence additional travel from the new San Diego market. Perhaps the ads need time to wear-in here, as they did in Austin.
- Sacramento continues to pose a challenge due to a relatively high level of unaware travel.

Ad-Influenced Trips by Market

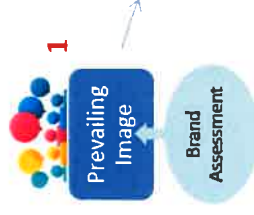
	Los Angeles (excl. Orange County)	New York	San Francisco	Sacramento	Austin	San Diego	Orange County	Total
Qualified HHs	3,302,264	5,878,896	1,990,472	1,103,816	616,968	852,560	1,079,200	14,824,176
Ad Awareness	34%	33%	29%	39%	19%	24%	29%	32%
Ad Aware HHs	1,119,571	1,910,641	583,872	430,488	118,491	200,352	307,572	4,670,986
Incremental Travel	2.2%	0.7%	8.0%	0.0%	7.6%	0.0%	10.4%	2.7%
Incremental Traveling HHs	24,176	13,112	46,557	0	9,022	0	31,963	124,831
% of HHs	22%	40%	13%	7%	4%	6%	7%	
% of incremental trips	19%	11%	37%	0%	7%	0%	26%	

- San Francisco and Orange County combined accounted for close to two-thirds of the ad-influenced trips in 2018-2019.

U-42



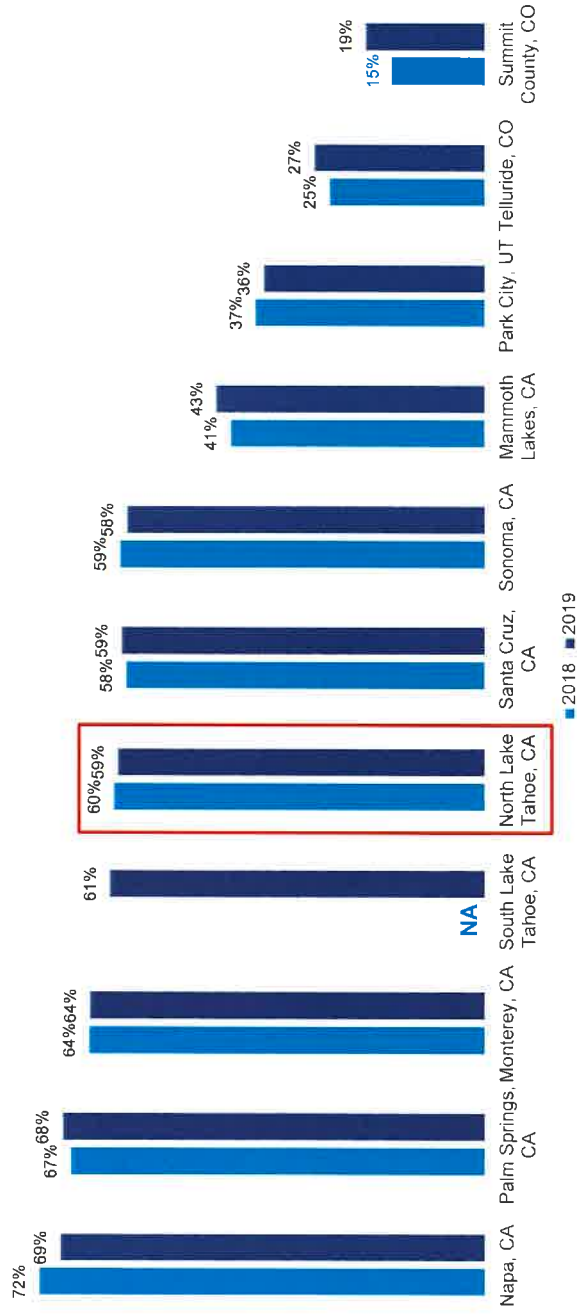
north lake tahoe



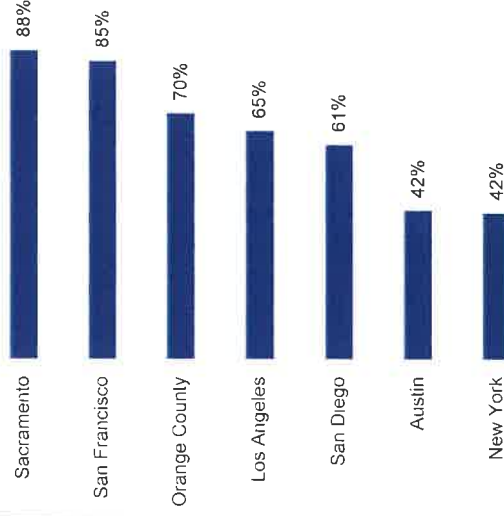
APPENDIX: COMPETITIVE POSITION

Familiarity

Familiar with area as a place for a leisure trip



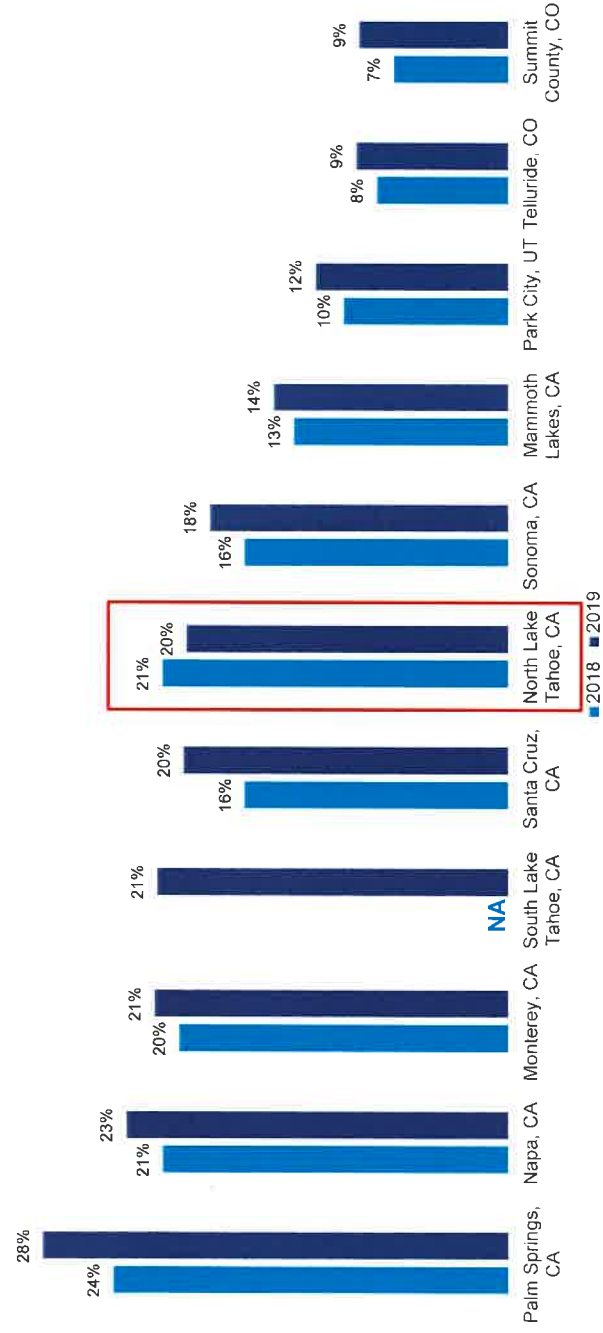
2019 North Lake Tahoe Familiarity by Market



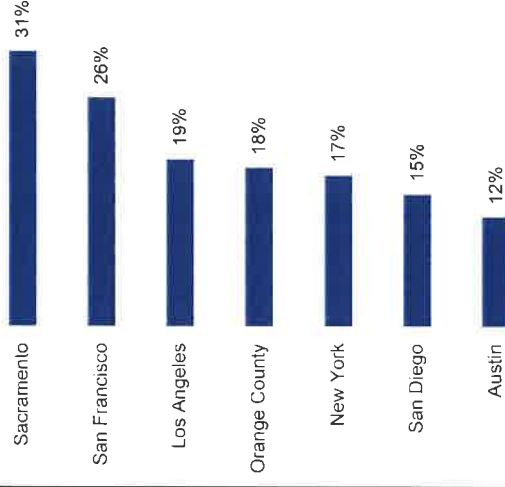
V-44

Likelihood to Visit

Likely to visit area for an overnight leisure trip in the next year

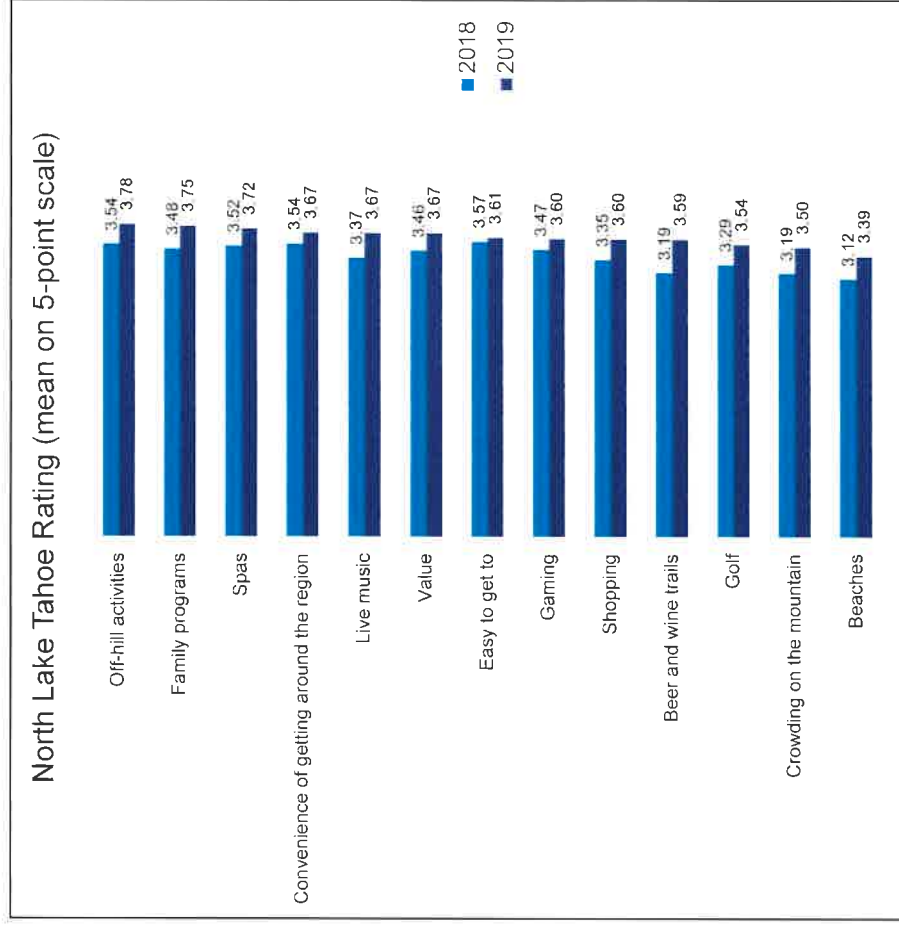
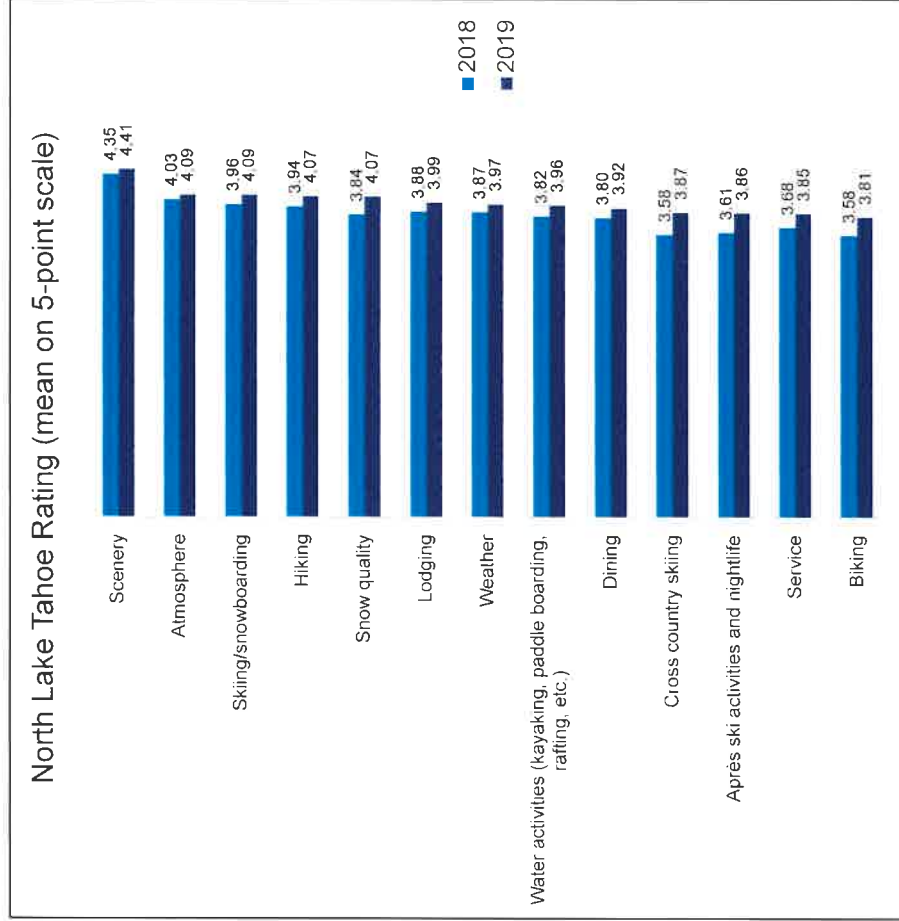


2019 Likely to Visit North Lake Tahoe by Market



North Lake Tahoe Image

None of these changes are statistically significantly different at the 95% confidence level.



V-46

Competitive Image

Above Average
Average
Below Average

	North Lake Tahoe, CA	Mammoth Lakes, CA	Monterey, CA	Napa, CA	Palm Springs, CA	Park City, UT	Santa Cruz, CA	Sonoma, CA	South Lake Tahoe, CA	Summit County, CO	Telluride, CO
Scenery	4.41	4.41	4.43	4.41	4.07	4.23	4.17	4.26	4.40	4.21	4.17
Atmosphere	4.09	4.07	4.19	4.22	4.01	4.21	4.02	4.04	4.18	4.27	3.87
Skiing/snowboarding	4.09	4.19	2.72	2.80	2.67	4.28	2.93	2.69	4.02	3.90	4.21
Hiking	4.07	3.99	3.74	3.80	3.70	4.11	3.75	3.67	4.10	4.15	3.88
Snow quality	4.07	4.14	2.67	2.67	2.79	4.15	2.84	2.65	4.01	3.67	4.08
Lodging	3.99	3.97	4.00	4.06	4.17	3.97	3.85	3.97	4.11	4.08	3.82
Weather	3.97	3.90	4.10	4.05	4.01	3.82	4.20	4.10	4.03	3.74	3.74
Water activities (kayaking, paddle boarding, rafting, etc.)	3.96	3.84	3.77	3.12	3.33	3.34	3.93	3.21	3.99	3.92	3.37
Dining	3.92	3.82	4.17	4.27	4.20	3.94	4.04	4.17	4.01	4.08	3.76
Cross country skiing	3.87	3.88	2.64	2.76	2.84	3.92	2.96	2.70	3.80	3.85	3.98
Après ski activities and nightlife	3.86	4.02	2.82	3.02	3.30	3.96	3.12	3.00	3.91	3.92	4.01
Service	3.85	3.77	3.85	4.05	4.13	4.01	3.86	3.82	3.92	3.94	3.84
Biking	3.81	3.66	3.88	3.75	3.87	3.96	3.87	3.73	3.91	3.92	3.69
Off-hill activities	3.78	3.86	3.40	3.46	3.56	3.71	3.61	3.46	3.78	3.66	3.76
Family programs	3.75	3.73	3.63	3.31	3.61	3.72	3.75	3.29	3.78	3.77	3.58
Spas	3.72	3.77	3.92	4.09	4.15	3.86	3.78	3.79	3.93	4.32	3.65
Convenience of getting around the region	3.67	3.71	3.85	3.84	3.89	3.65	3.84	3.64	3.80	3.79	3.57
Live music	3.67	3.59	3.58	3.59	3.84	3.61	3.85	3.38	3.77	4.34	3.75
Value	3.67	3.71	3.47	3.54	3.76	3.43	3.77	3.42	3.75	3.81	3.59
Easy to get to	3.61	3.64	3.77	3.83	3.88	3.72	3.92	3.78	3.77	3.83	3.59
Gaming	3.60	3.36	2.90	2.80	3.57	2.93	3.26	2.94	3.80	3.42	3.67
Shopping	3.60	3.56	3.83	3.80	4.06	3.46	3.75	3.66	3.67	3.90	3.68
Beer and wine trails	3.59	3.60	3.48	4.42	3.66	3.44	3.56	4.16	3.61	3.75	3.59
Golf	3.54	3.49	3.73	3.50	4.05	3.66	3.49	3.48	3.61	3.17	3.30
Crowding on the mountain	3.50	3.46	3.04	3.06	3.35	3.43	3.31	3.10	3.47	3.60	3.51
Beaches	3.39	3.37	3.94	2.91	3.07	2.60	4.06	2.94	3.50	3.74	2.82

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APPENDIX: QUESTIONNAIRE

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Questionnaire

North Lake Tahoe 2018-19 Ad Effectiveness Research
June 2019

ZIP: What is your ZIP code? _____

51. Who in your household is primarily responsible for making decisions concerning travel destinations?
Me _____
My spouse/partner _____
My spouse/partner/other → TERMINATE AT END OF SCREENS

Now/Travel: Please indicate if each of the following applies to you. YES/NO

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 SCREENS IF NO

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 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			
South Lake Tahoe, 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	

Strategic Marketing & Research Insights

1

Santa Cruz, CA	
Palm Springs, CA	
Monterey, CA	
South Lake Tahoe, CA	
None of these (ABCDEFGHIJ)	

3. Have you visited any of these areas for an overnight leisure trip since July 2018?

7a. How did you gather information about each of these places?	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
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								
South Lake Tahoe, CA								
None of these (ABCDEFGHIJ)								

4. How many overnight leisure trips did you take to each of these areas since July 2018?

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	
South Lake Tahoe, CA	
None of these (ABCDEFGHIJ)	

5. 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	
Snow quality	
Skiing/snowboarding	
Cross country skiing	
Crowding on the mountain	
Value	
Service	
Weather	
Logging	
Fishing	
Apres ski activities and nightlife	
Off-hill activities	
Family programs	
Accessibility: Easy to get to	
Atmosphere	
Convenience of getting around the region	
Scenery	
Hiking	
Biking	
Beaches	

Strategic Marketing & Research Insights

2

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

ROTATE	Not at all 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				
South Lake Tahoe, 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	1	2	3	4	5	Excellent	N/A
Snow quality							
Skiing/snowboarding							
Cross country skiing							
Crowding on the mountain							
Value							
Service							
Weather							
Logging							
Fishing							
Apres ski activities and nightlife							
Off-hill activities							
Family programs							
Accessibility: Easy to get to							
Atmosphere							
Convenience of getting around the region							
Scenery							
Hiking							
Biking							
Beaches							

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3

V-49

V-50

7a. Which of the following North Lake Tahoe resorts have you heard of?

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IF VISITED MULTIPLE TIMES FROM Q4, SAY:

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

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

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

Strategic Marketing & Research InsightsStrategic Marketing & Research Insights

Questionnaire

Experiencing the unique culture of the area

Visiting historical sites

Parasailing

Yoga

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?

Hotel or motel

RV, barge or bed & breakfast

Resort

Home share such as Airbnb

Rental home, condominium, or timeshare

With friends or family

Camping

Other, please specify _____

ASK 16A IF THEY STAYED AT A RESORT IN Q16

16a. Which resort(s) did you stay at?

None

Granite House Tahoe

Crystal Lake Inn

Conrad Tahoe at Northstar

Tahoe Inn at Northstar

Northstar California Resort

Squaw Valley Lodge

West Shore Lake & Inn

Tahoe Mountain Lodge

Mammoth Lakes Tahoe Resort

The Ritz Carlton Lake Tahoe

Resort at Squaw Creek

The Village at Squaw Valley

Crystal Glen Lodge

Rhodes Bay Resort & Marina

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7

Summit Restaurant & Lodge

Heart Regency Lake Tahoe Resort Spa & Casino

Homestead Square Valley Inn

Northstar Lodge by West. Resorts

Hotel at Sugar Bowl

Other, please specify _____

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

Tahoe City

Big Bear

Carlinville

Northstar

Crystal Lake

West Shore/Homestead

Squaw Valley

Northstar

Remo

Truckee

South Lake Tahoe

Other, please specify _____

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

Alone

Car

Alone/Rental Car

Organized Trip

Other _____

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

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

ASK Q19 IF Q18 < 3.

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

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8

23. Please estimate how much your travel party spent while in North 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 _____

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

Yes

No

IF Q24 = YES, ASK Q25

25. 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 _____

LinkedIn _____

Other, please specify _____

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9

Questionnaire

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.

VIDEO



North Lake Tahoe
Vimeo: 342261985



North Lake Tahoe - SoCal, WinterView
Vimeo: 342262587

26. Have you seen this video ad before?

Yes
No

DIGITAL

Fall



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10

Winter



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11

Questionnaire

27. Please indicate if you have seen each of these online ads before now.

Yes
No

SOCIAL



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



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The Official Website

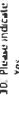
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13

OUTDOOR



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



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The Official Website



The Official Website



The Official Website



The Official Website



The Official Website



The Official Website

30. Please indicate if you have seen each of these billboard ads before now.

Yes
No

31. 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 relax					
That's good for a winter vacation					
That's good for a hot weather vacation					
That's good for the outdoors					

32. 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					

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15

Questionnaire



29a. Have you visited the North Lake Tahoe website? A picture of the website homepage is shown above.

Yes
No

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

33. 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	1	2	3	4	5	Very important
Relaxation and rejuvenation	1	2	3	4	5		
Excitement at beginning	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		

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

ROTATE	Disagree strongly	Disagree somewhat	Neutral	Agree	Agree strongly
Travelers to have a very relaxing/quiet back location					
Travelers being pampered on trip 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					
My children strongly influence the destination I choose for vacation					

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16

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

D1. Are you...?
Male
Female

D2. What is your annual household income range?

Less than \$15,000
\$15,000-\$44,999
\$45,000-\$64,999
\$65,000-\$74,999
\$75,000-\$99,999
\$100,000-\$149,999
\$150,000-\$200,000
\$200,000+

D3. Are you currently?
Single
Married

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)

0-2 years old
3-6 years old
7-12 years old
13-14 years old
15-18 years old

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

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17



north lake tahoe

Incline Village/Crystal Bay Visitors Bureau

To: IVCBVB Board of Directors

Fr: Andy Chapman

Date: 10/23/2019

Re: Tahoe Transportation District/One Tahoe Funding Plan

Background

Representatives from the Tahoe Transportation District and the One Tahoe Funding plan will present to the board the current status of the Tahoe Basin regional transportation needs as well as identified unmet funding needs being addressed in the One Tahoe Funding plan as well as the TRPA's Regional Transportation Plan update.

VI-1



north lake tahoe

Incline Village/Crystal Bay Visitors Bureau

To: IVCBVB Board of Directors

Fr: Andy Chapman

Date: 10/23/2019

Re: Discussion and Input on FY 2019/20 CEO Performance Goals

Background (This item was carried over from the September Board meeting)

At its July meeting, the Board directed staff to review the 2019/20 CEO Performance Goals. Board member Watson agreed to assist staff in this process.

Staff requests the board discuss and provide input on the next year's CEO goals. Staff will present to the board at its October meeting the FY 2019/20 CEO Performance Goals for discussion and possible action.

Strategic Priorities	FY 19/20 Goals	% Weight	Process
Strategic Priority #1: Marketing & Promotions			
Increase incremental influenced overnight room bookings in the North Lake Tahoe region.	Increase of 3% (3,745) total incremental influenced room bookings by FYE 2019/20.	20%	Bonus calculated on following scale: • Full bonus awarded if goal achieved • 15% bonus awarded for 80% of goal achieved Data Source – Smari
Increase length of stay in the Incline Village/Crystal Bay communities.	Develop and implement new marketing programs designed to extend visitor length of stay and trip expenditures.	15%	Bonus given if goal achieved. Data Source – Visitor Survey
Strategic Priority #2: Transportation/Transit			
Ensure Incline Village/Crystal Bay transportation and transit projects are included in the TTD's One Tahoe Funding & TRPA's Regional Transportation Plan	By FYE 2019/20, IV/CB transportation and transit needs will be identified and included in the Regional Transportation Plan update.	15%	Bonus given if goal achieved. Data Source – One Tahoe Plan & Regional Transportation Plan
Strategic Priority #3: Enhanced Visitor Assets			
Increase visibility of IVCB tourism and visitor servicing assets.	Implement programs designed to identify and highlight the IVCB tourism assets to increase length of stay and visitor spend. Programs will highlight the Key	15%	Bonus given if goal achieved. Data Source – Smari

	Motivator/Large Audience assets as determined by SMARI research.		
Strategic Priority #4: Organizational Reputation/Relationships			
PARTNERSHIP RELATIONS – Strengthen relationship with regional and strategic partnerships.	Increase organizational interaction with key partnerships of TTD, TMA, TRPA, RSCVA, RTT, Travel Nevada, Visit California, RASC, and NLTRA by engaged participation.	10%	Bonus given if goal achieved. Data Source – Peer Survey
Strategic Priority #5: Financial Sustainability			
MERCHANDISE SALES – Develop comprehensive merchandise sales strategy to increase net revenues.	Increase net revenues by 5% over FYE 2018/19.	5%	Bonus given if goal achieved.
FINANCIAL HEALTH – Deliver on targeted Management/General Expense to Overall Expenses.	Management/General Expenses not to exceed 30% of total annual expenses.	10%	Bonus given if goal achieved.
FINANCIAL HEALTH – Deliver accurate financial reporting and accountability. Deliver on the Board approved fiscal year budget.	+/- 5% of fiscal year budget achieved	5%	Bonus given if goal achieved.
LEADERSHIP	Maintain a solid core organizational team	5%	Bonus given if goal achieved.
Per board action on July 17th, 2019, CEO is eligible for 20% performance merit bonus based on board approval and goal results.			

September 2019 Financial Summary Report

Sept. Month End Variance Report

REVENUE

- 46000 Merchandise Sales: 51% over budget due to strong gift shop sales.
- R277 Concierge: 32% over budget due to higher AT sales.
- R250 Fund Transfer: .5% under budget due to lower July TOT collections.

EXPENSES

- 50000 Cost of Goods Sold: 50% over budget due to higher merchandise sales
- 305 Payroll: 7% over budget due to temporary staff needs.
- 0451 Legal & Accounting: 74% over budget due to end of year needs.
- 0473 Dues and Subscriptions: Over budget due to timing.
- 0501 Travel & Lodging: Over budget due to timing of conferences.
- 0691 Shuttle Subsidy: Under budget due to timing of payments.
- 0751 Concierge Expense: 34% over budget due to higher AT ticket sales.

Sept. Year to Date Variance Report

REVENUE

- 46000 Merch Sales: 25% over budget due to higher retail sales.
- R277 Concierge: 8% over budget due to higher AT sales.
- R250 Fund Transfer: 1.6% under budget due to lower TOT collections.

EXPENSES

- 0473 Dues and Subscriptions: Over budget due to timing.
- 0501 Travel & Lodging: Over budget due to timing of conferences.
- 0691 Shuttle Subsidy: Under budget due to timing of payment.
- 0751 Concierge Expense: 103% over budget due to strong AT sales.

	Sep 19	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Income				
POS Sales				
46000 · Merchandise Sales	10,092.05	6,660.00	3,432.05	151.5%
R277 · Concierge	66,695.50	50,188.35	16,507.15	132.9%
R290 · Consignment Sales	26.00	30.00	-4.00	86.7%
Total POS Sales	76,813.55	56,878.35	19,935.20	135.0%
R250 · Fund Transfers	270,979.83	272,381.00	-1,401.17	99.5%
R252 · Interest Income	48.33	62.00	-13.67	78.0%
R269 · On Hold Messaging	0.00	54.55	-54.55	0.0%
R270 · Miscellaneous Revenue	0.00	44.55	-44.55	0.0%
Total Income	347,841.71	329,420.45	18,421.26	105.6%
Cost of Goods Sold				
50000 · Cost of Goods Sold	4,602.29	3,072.05	1,530.24	149.8%
Total COGS	4,602.29	3,072.05	1,530.24	149.8%
Gross Profit	343,239.42	326,348.40	16,891.02	105.2%
Expense				
0305 · Payroll	31,188.93	29,119.33	2,069.60	107.1%
0314 · State Employer Taxes	203.31	125.00	78.31	162.6%
0315 · Federal Unemployment	5.27	43.00	-37.73	12.3%
0316 · Public Employees Retirement Sys	7,709.97	7,780.45	-70.48	99.1%
0319 · Employer Medicare/Soc Sec	588.44	539.26	49.18	109.1%
0320 · Health Insurance	3,389.21	3,462.43	-73.22	97.9%
0321 · Employee Training	0.00	181.82	-181.82	0.0%
0400 · Utilities				
0401 · Utilities- Electric	176.54	175.00	1.54	100.9%
0402 · Utilities-Gas & Heat	29.38	25.00	4.38	117.5%
0403 · Utilities- Water & Refuse	340.96	342.97	-2.01	99.4%
Total 0400 · Utilities	546.88	542.97	3.91	100.7%
0405 · Bank & Cr Card Charges	4,269.74	3,614.17	655.57	118.1%
0410 · Office Supplies & Expenses	364.43	577.08	-212.65	63.2%
0411 · Maintenance/Janitorial	852.90	1,175.00	-322.10	72.6%
0412 · IT - Computers	87.50	183.33	-95.83	47.7%
0415 · Misc. Sales Tax (Sales Tax Paid on Purcha...	0.00	9.09	-9.09	0.0%
0420 · Postage & Freight	100.00	36.01	63.99	277.7%
0421 · Communications	679.31	507.63	171.68	133.8%
0422 · Printing Expenses	0.00	41.66	-41.66	0.0%
0451 · Legal & Accounting Services	6,535.00	3,750.00	2,785.00	174.3%
0460 · Contract Services	0.00	42.67	-42.67	0.0%
0461 · Remote Offices	3,500.00	3,500.00	0.00	100.0%
0462 · Equipment Lease & Maint.	566.45	472.68	93.77	119.8%
0470 · Misc. Expenses	0.00	136.36	-136.36	0.0%
0473 · Dues & Subscriptions	6,278.66	1,798.00	4,480.66	349.2%
0474 · License & Fees	100.00	34.18	65.82	292.6%
0501 · Travel & Lodging	3,003.80	350.00	2,653.80	858.2%
0504 · Registrations	1,020.00	38.56	981.44	2,645.2%
0505 · Local Transportation/Car	497.64	168.80	328.84	294.8%
0507 · Meeting Expenses	0.00	110.00	-110.00	0.0%
0601 · Hospitality in Market				
0601.5 · In House	0.00	1,200.00	-1,200.00	0.0%
0601 · Hospitality in Market - Other	488.57	50.00	438.57	977.1%
Total 0601 · Hospitality in Market	488.57	1,250.00	-761.43	39.1%

	Sep 19	Budget	\$ Over Budget	% of Budget
0622 · Advertising Co-op	142,500.00	142,500.00	0.00	100.0%
0623 · Regional Marketing Programs	258.02	811.14	-553.12	31.8%
0650 · Payroll Expense	105.00	120.75	-15.75	87.0%
0691 · Shuttle Subsidy/Sponsorship	0.00	8,930.00	-8,930.00	0.0%
0730 · Special Promotional Items	0.00	36.36	-36.36	0.0%
0733 · On-Hold Messaging	0.00	129.17	-129.17	0.0%
0751 · Concierge Expense	58,867.36	43,663.86	15,203.50	134.8%
0800 · Grant Expenses	0.00	454.55	-454.55	0.0%
51100 · Freight and Shipping Costs	143.46	0.00	143.46	100.0%
59900 · POS Inventory Adj -Merchandise	-51.88			
Total Expense	273,797.97	256,235.31	17,562.66	106.9%
Net Ordinary Income	69,441.45	70,113.09	-671.64	99.0%
Net Income	69,441.45	70,113.09	-671.64	99.0%

INCLINE VILLAGE CRYSTAL BAY VISITORS BUREAU
Profit & Loss Budget vs. Actual

Accrual Basis

July through September 2019

	Jul - Sep 19	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Income				
POS Sales				
46000 · Merchandise Sales	31,428.28	24,988.18	6,440.10	125.8%
R277 · Concierge	224,917.40	207,198.55	17,718.85	108.6%
R290 · Consignment Sales	72.00	80.00	-8.00	90.0%
Total POS Sales	256,417.68	232,266.73	24,150.95	110.4%
R250 · Fund Transfers	538,062.98	546,929.00	-8,866.02	98.4%
R252 · Interest Income	152.13	173.64	-21.51	87.6%
R269 · On Hold Messaging	100.00	209.10	-109.10	47.8%
R270 · Miscellaneous Revenue	10.00	99.10	-89.10	10.1%
Total Income	794,742.79	779,677.57	15,065.22	101.9%
Cost of Goods Sold				
50000 · Cost of Goods Sold	14,853.48	11,825.17	3,028.31	125.6%
Total COGS	14,853.48	11,825.17	3,028.31	125.6%
Gross Profit	779,889.31	767,852.40	12,036.91	101.6%
Expense				
0305 · Payroll	123,216.73	120,068.06	3,148.67	102.6%
0313 · Employers Insurance of Nevada	858.00	858.00	0.00	100.0%
0314 · State Employer Taxes	714.47	615.00	99.47	116.2%
0315 · Federal Unemployment	55.81	112.98	-57.17	49.4%
0316 · Public Employees Retirement Sys	23,222.67	23,019.90	202.77	100.9%
0319 · Employer Medicare/Soc Sec	2,255.06	2,146.65	108.41	105.1%
0320 · Health Insurance	9,755.64	9,922.08	-166.44	98.3%
0321 · Employee Training	0.00	363.64	-363.64	0.0%
0400 · Utilities				
0401 · Utilities- Electric	536.94	510.02	26.92	105.3%
0402 · Utilities-Gas & Heat	91.54	78.78	12.76	116.2%
0403 · Utilities- Water & Refuse	1,024.20	1,008.32	15.88	101.6%
Total 0400 · Utilities	1,652.68	1,597.12	55.56	103.5%
0405 · Bank & Cr Card Charges	10,854.35	9,934.64	919.71	109.3%
0410 · Office Supplies & Expenses	1,460.52	1,283.35	177.17	113.8%
0411 · Maintenance/Janitorial	2,992.80	3,525.00	-532.20	84.9%
0412 · IT - Computers	312.50	504.16	-191.66	62.0%
0415 · Misc. Sales Tax (Sales Tax Paid on Purchases)	0.00	18.18	-18.18	0.0%
0420 · Postage & Freight	203.91	175.93	27.98	115.9%
0421 · Communications	1,667.76	1,432.39	235.37	116.4%
0422 · Printing Expenses	0.00	124.98	-124.98	0.0%
0430 · Building Repairs & Insurance	3,090.00	3,090.00	0.00	100.0%
0451 · Legal & Accounting Services	14,785.00	12,750.00	2,035.00	116.0%
0460 · Contract Services	0.00	573.67	-573.67	0.0%
0461 · Remote Offices	10,500.00	10,500.00	0.00	100.0%
0462 · Equipment Lease & Maint.	789.36	826.81	-37.45	95.5%
0470 · Misc. Expenses	121.14	272.72	-151.58	44.4%
0473 · Dues & Subscriptions	7,003.64	2,512.99	4,490.65	278.7%
0474 · License & Fees	148.00	92.36	55.64	160.2%
0501 · Travel & Lodging	6,920.00	1,714.43	5,205.57	403.6%
0504 · Registrations	2,328.00	2,346.56	-18.56	99.2%
0505 · Local Transportation/Car	571.88	480.81	91.07	118.9%
0507 · Meeting Expenses	-1,053.18	340.00	-1,393.18	-309.8%
0601 · Hospitality in Market				
0601.5 · In House	25.00	1,225.33	-1,200.33	2.0%
0601 · Hospitality in Market - Other	277.46	137.54	139.92	201.7%
Total 0601 · Hospitality in Market	302.46	1,362.87	-1,060.41	22.2%

VIII-4

INCLINE VILLAGE CRYSTAL BAY VISITORS BUREAU
Profit & Loss Budget vs. Actual

Accrual Basis

July through September 2019

	Jul - Sep 19	Budget	\$ Over Budget	% of Budget
0622 · Advertising Co-op	288,468.00	288,468.00	0.00	100.0%
0623 · Regional Marketing Programs	1,525.05	1,781.72	-256.67	85.6%
0650 · Payroll Expense	325.00	354.00	-29.00	91.8%
0690 · Sponsorship	5,500.00	5,000.00	500.00	110.0%
0691 · Shuttle Subsidy/Sponsorship	0.00	17,860.00	-17,860.00	0.0%
0725 · Uniforms	440.00	440.00	0.00	100.0%
0730 · Special Promotional Items	0.00	72.72	-72.72	0.0%
0733 · On-Hold Messaging	0.00	387.51	-387.51	0.0%
0751 · Concierge Expense	198,959.25	180,654.74	18,304.51	110.1%
0800 · Grant Expenses	0.00	909.10	-909.10	0.0%
51100 · Freight and Shipping Costs	474.66	0.00	474.66	100.0%
59900 · POS Inventory Adj -Merchandise	152.91			
Total Expense	720,574.07	708,493.07	12,081.00	101.7%
Net Ordinary Income	59,315.24	59,359.33	-44.09	99.9%
Net Income	59,315.24	59,359.33	-44.09	99.9%

VIII-5

Oct 23, 2019

Revenues & Stats				
	Aug-2019	Aug-2018	Variance	
Grant Revenues				
Monthly	\$ 245,218	\$ 228,397		7.4%
YTD	\$ 783,281	\$ 765,655		2.3%
Total Taxable Revenues	\$ 7,402,817	\$ 7,273,198		1.8%
	Aug Actual	Aug Budget		
Monthly	\$ 245,218	\$ 232,508		5.5%
YTD	\$ 783,281	\$ 779,437		0.5%
Occupancy				
Hotel	81.1%	82.3%		-1.4%
Motel	27.9%	22.0%		26.7%
Vacation Rental	33.4%	29.1%		14.8%
Time Share	10.5%	9.3%		13.6%
Home Owner	n/a	n/a		n/a
Total	46.6%	44.7%		4.3%
Room Rate				
Hotel	\$ 385.85	\$ 399.59		-3.4%
Motel	\$ 141.87	\$ 128.55		10.4%
Vacation Rental	\$ 319.31	\$ 318.68		0.2%
Time Share	\$ 296.01	\$ 321.05		-7.8%
Home Owner	n/a	n/a		n/a
Total	\$ 347.94	\$ 361.56		-3.8%
RevPar				
Hotel	\$ 312.94	\$ 328.74		-4.8%
Motel	\$ 39.62	\$ 28.33		39.9%
Vacation Rental	\$ 106.78	\$ 92.85		15.0%
Time Share	\$ 31.20	\$ 29.81		4.7%
Home Owner	n/a	n/a		n/a
Total	\$ 162.18	\$ 161.62		0.3%

Visitor Information Comparative Statistics For Fiscal YTD			
	Sept-2019	Sept-2018	Variance
Walk In Visitor Count			
Monthly	7311	6933	5.5%
YTD	26,853	23,887	12.4%
Merchandise Sales			
Monthly	\$ 10,092	\$ 7,035	43.5%
YTD	\$ 31,428	\$ 22,995	36.7%
Concierge & AT Sales			
Monthly	\$ 66,696	\$ 47,348	40.9%
YTD	\$ 224,917	\$ 204,730	9.9%
Vacation Planners Mailed	60	103	-41.7%

Destimetrics Reservations Activity (as of Sept 30, 2019)				
	FY 2019/20	FY 2018/19	Variance	
Current Month Occupancy	50.9%	53.4%		-4.7%
Current Month ADR	\$ 288	\$ 282		2.2%
Current Month REVPAR	\$ 147	\$ 151		-2.7%
Next Month Occupancy	27.5%	29.3%		-6.2%
Next Month ADR	\$ 213	\$ 208		2.9
Next Month REVPAR	\$ 59	\$ 61		-3.5%
Winter Total Occupancy (proj)	12.8%	15.3%		-16.2%
Winter Total ADR (proj)	\$ 362	\$ 286		26.6%
Winter Total REVPAR (proj)	\$ 46	\$ 44		6.00%

Reno Tahoe International Airport			
	Aug-2019	Aug-2018	Variance
Total Passengers Served	431,640	402,794	7.2%
Average Load Factor	79.9%	86.4%	-7.5%
Total Number of Departures	2,169	1,978	9.7%
Non-Stop Destinations Served	21	23	-8.7%
Departing Seat Capacity	264,724	235,399	12.5%
Crude Oil Averages (barrel)	\$ 54.81	\$ 68.06	-19.5%

Notes of interest:

Frontier Airlines will begin RNO to LAS service starting November 14th
Delta Airlines will begin ALT to RNO daily non-stop service starting May 1st
Alaska Airlines suspend BOI to RNO service starting January 7th

Conference Revenue Statistics				
(Booked as of September 30th 2019)				
	FY 2019/20	FY 2018/19	Variance	
Total Revenue Booked	\$ 3,470,265	\$ 2,419,357		43.4%
Number of Room Nights	17,049	13,403		27.2%
Number of Delegates	7,718	8,218		-6.1%
Number of Tentative Bookings	57	46		23.9%
Number of Leads Generated				#DIV/0!
Conference Revenue And Percentage by County:				
	19-20	18-19		
Placer	80.0%	67.0%		65.7%
Washoe	15.0%	9.0%		167.3%
South Lake	5.0%	24.0%		-70.2%
Nevada	0.0%	0.0%		#DIV/0!
Total Conference Revenue	100.0%	100.0%		42.3%

IX-1

Top Website Lodging Referrals (April)	Total Lodging Ref.	Unique Lodging Ref.
Hyatt Regency Lake Tahoe Resort	107	102
Tahoe Biltmore Lodge & Casino	53	48
Tahoe Luxury Properties	53	52
Cedar Glen Lodge	49	47
The Ritz-Carlton, Lake Tahoe	45	40
Tahoe Rentals by Wells and Bennett	42	35
Tahoe Truckee Factory Stores	41	33
The Village at Squaw Valley	40	39
Cedar Crest Cottages	38	36
Hyatt High Sierra Lodge	38	37
Meeks Bay Resort & Marina	36	32
Cobblestone Center Shopping Mall	33	32
Brockway Springs Resort	32	28
Tahoe Moon Properties	30	30
Tahoma Meadows Cottages	30	28
Tahoe Rental Company	28	25
Northstar California Resort	27	27
Resort at Squaw Creek	27	26
Rockwood Lodge	27	25
Rustic Cottages	27	26
Mourelatos Lakeshore Resort	26	26
Hauserman Rental Group	24	22
Cottage Inn at Lake Tahoe	22	22
Tahoe Mountain Lodging	21	20
Basecamp Hotel Tahoe City	20	19

IX-2



north lake tahoe

Departmental Reports October 2019

Click [HERE](#) to download Departmental Reports



September 2019
Conference Report

NEW MEETINGS & RFPs DISTRIBUTED:

1. KinderCare Education- Champions Annual Kick-off January 2020. 416 room nights; 160 people
2. Symposia Medicus #1536 – 22nd Annual Conference July 2020. 775 room nights; 155 people
3. Nevada Association of School Boards – Educational Summit March 2020. 45 room nights; 60 people
4. Sigma Chi Fraternity at the University of Utah - Fall Formal – November 2019. 180 room nights; 350 people
5. Tourism Cares for Lake Tahoe – Overflow May 2020. 120 room nights; 150 people
6. Pesticide Applicators Professional Association – Education & Seminary, September 2020; 120 room nights; 60 people
7. Southeaster Lumber Manufacturers – 2023 Annual Conference; July 2023; 831 room nights; 400 people
8. American Express Global Travel 2HFY20 – Contest Winner Trip. April 2020; 75 room nights; 30 people
9. Sierra Pacific Synod Profession Leadership Conference 2020, October 2020; 146 room nights; 90 people
10. HPN – 69222 Sales Kickoff – Jubilee February 2020; 480 room nights; 160 people
11. HPN – 69110 Winter Branch Trip OPS JM, December 2019; 36 room nights; 26 people
12. DMA West – Leadership Summit for CEO's – July 2020
13. California Psychological Association - CPA 2021 Annual Convention, April 2021; 525 room nights; 300 people
14. Johnson Controls – Best of Brands/Brand Masters = December 2021- Reception 250 people
15. American Society of Mechanical Engineers 2020 ASME LX Summit, August 2020; 180 room nights; 70 people
16. 2022 California Fire Prevention Institute – Northern California, March 2022; 1575 room nights; 315 people
17. Kimley – Horn and Associates, 2020 Planning Meeting, July 2020; 80 room nights; 20 people
18. HPN – 69328 President's Club April 2020, 120 room nights; 40 people

DEFINATE BOOKINGS:

1. Uber Eats – Executive Offsite, October 21-23, 2019; \$7,585 in room revenue, 41 room nights and 20 people at the Hyatt Lake Tahoe
2. OmniSci Company Kickoff, February 3-5, 2020; \$78,498 in room revenue; 450 room nights and 150 people at the Resort at Squaw Creek
3. CrowdStrick Commercial Team, February 18-20, 2020; \$21,840, 120 room nights and 160 people at the Hyatt Lake Tahoe

Xa-1

4. Coalitions & Collaborative, Inc – After the Flames Workshop, April 5-9, 2020; \$66,000 in room revenue; 450 room nights and 300 people at Granlibakken Tahoe
5. American Foundry Society Leadership, September 18-22, 2020; \$59,508 in room revenue, 129 room and 75 people at Resort at Squaw Creek

SITE VISITS

- a. Site Inspection for American Feed Industry Association – ELS 2020, October 2020. This program is 345 Room nights/100 Peak Rooms/150 People. This program is considering the Ritz Carlton Lake Tahoe.
- b. Planning Visit for the Water Sports Industry Association –
- c. Wilderness Medical Society - 2021 Winter Annual Meeting, February 2021. This program is 405 room nights/80 peak room/250 people. The program is considering Hyatt Lake Tahoe, Granlibakken Tahoe, Village at Squaw Valley and Resort at Squaw Creek.

TRADESHOWS & SALES CALLS CONDUCTED

- Upcoming:
 - HPN Annual Partner Conference – October 3, 2019
 - Connect Tech & Medical – October 13-16, 2019

CHICAGO CONTRACT UPDATE:

-

MCC MARKETING & PR UPDATES:

-

PROJECT WORK:

- Conference call with Ritz Carlton and RMC to plan HelmsBriscoe Fam Event November 22-24. Assisting with HB Cares event where they are looking to do an event that gives back to the North Lake Tahoe Community.



Leisure Departmental Report
September 2019

TRAVEL TRADE SALES CALLS & MEETINGS:

- Attended:
 - Visit California Canada Mission – September
 - Vancouver World Expo – September
 - Our in-market firm DCI will be attending. Sharing the booth with Newport Beach & Huntington Beach to reduce cost
 - Active America China – September
 - Attended with the RSCVA and met with (30) China specific receptive tour operators
 - Travel NV Mexico Sales Mission – September
 - Hosted tradeshow with Mexico's largest OTAs – Best Day & Price Travel
 - Trained (64) agents at Al Mundo, Travel Impressions, Viajes Palacio and Ofertas Turisticas.
 - Hosted (2) main events that featured travel associations, trade media and influencers

INTERNATIONAL MEDIA:

- Hosted
 - Travel Nevada – Food & Travel, Mexico – September
 - 172K monthly distribution
- Upcoming
 - Canada Digital Influencer FAM – October
 - Gold Pass Program shared with Mammoth Lakes & Yosemite

TRAVEL TRADE FAMS:

- Hosted FAMS
 - Travel Nevada Australia, Mexico & Canada trade FAM
- Future FAMS:
 - Air Canada FAM – October
 - DCI Immersion Trip – October
 - RSCVA China FAM – October
 - Australian American Express Luxury FAM – November
 - MTS Pre & Post FAMS – March/April 2020
 - Travel Masters VIP Incentive Trip, Canada – May 2020

INTERNATIONAL OFFICE UPDATE:

- NEW: Launched German, Austria & Switzerland office

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- Company: MSI
- Immersion training conducted online, German press release was pushed out to local media and in the German market, North Lake Tahoe featured in trade newsletter.
- Next steps: TOURISTIK Training
- Canada October Update:
 - Agents Trained: 35
 - Conducted online webinar with Senior Discover Tours – NLT and Mourelatos hosted
 - (7) Key Meetings: Aimia, Gravitare, Group Voyages Quebec, Huntington Travel, New Wave Travel, Vision Canada, Voyages Laurier Du Vallon.
 - Attended the Visit California Sales Mission
 - B2B meetings conducted in Toronto
 - Travel event events in Montreal
 - Travel agent & media events in Vancouver
 - Key event: North Lake Tahoe was represented at the Vancouver International Travel Expo. Key meetings were conducted with The Travel Group and Protocolo. Post show report to be included in October's report.
- UK/Ireland Update:
 - Trainings conducted with Scott Dunn
 - Total agents trained: 7
 - (6) Key Meetings Conducted: Audley Travel, British Airways, Holidays Architects, Inspiring Travel Company, Travelbag, and USAirtours
 - Key news: Thomas Cook, one of the largest UK/global tour operators filed for bankruptcy and close their doors.
- Australia October Update:
 - 21 Agents Trained
 - (15) Key Meetings Conducted: Excite Holidays, Fligh Centre, Expedia TAAP, Travel Partners, Sno'n'ski, Travel Associates, Luxury Escapes and more.

PROJECTS:

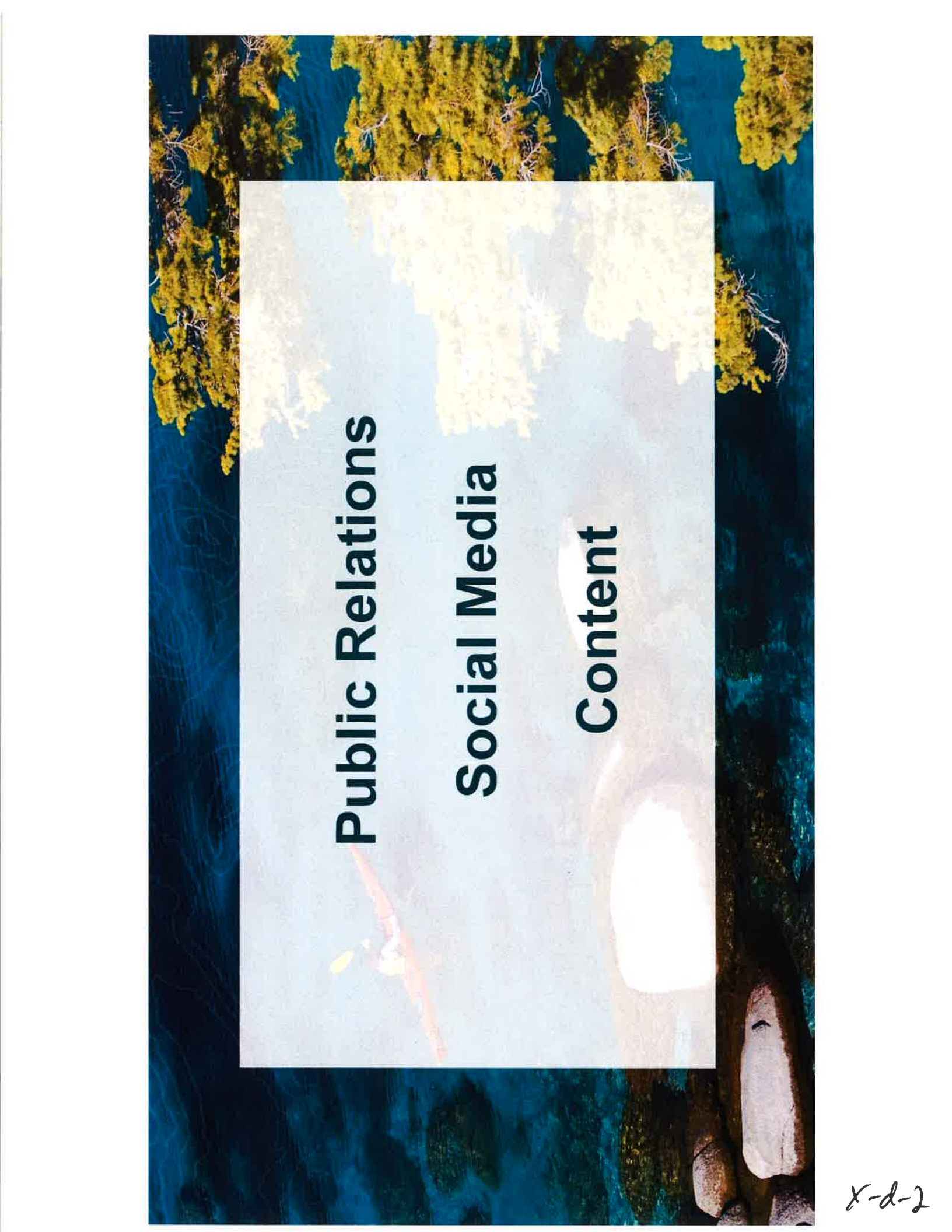
- Hosted Visit USA Parks photographer and writer
- Attended the High Sierra Council Meeting – Bishop, CA
- Tourism Cares Conference:
 - Booked this industry conference for May 2020 with Squaw Valley
 - Logo is created, images provided, and planning is underway
 - Site Visits – November 2019
- China Ready Document:
 - Rough draft complete, edits underway
 - Next step – rebranding
- MTS 2020
 - Hosted site visits August 19-21st
 - Sponsorship requests went out
 - Planning for Group FAM, Trade FAM and event are underway

September 2019 Recap



north lake tahoe

THE ABBBI
AGENCY™



Public Relations Social Media Content

Overall Objectives & KPIs

Public Relations

- Flight markets: Increase number of earned media impressions in target flight markets of Southern California, New York and Houston/Dallas
 - **Sept: 2 placements in SoCal**
- SEO Impact: Increase number of earned media placements in publications with a higher domain rank authority than gotahoenorth.com
 - **Sept. Placement w/ Highest DA: [SF Chronicle \(DA: 84\)](#)**
- Shoulder Season Messaging: Increase earned media coverage in fall and spring.
 - **Secret Season Placement Highlight: [Fox 40 - Spartan World Championship interview w/ Liz Bowling and Autumn Food & Wine preview](#)**
- Emerging markets: Obtain at least one media placement in publication that is targeted to emerging markets identified in the Tourism Development Plan
 - **Sept Update: [TAA is pursuing ongoing pitching efforts to emerging markets such as San Diego, Austin, Portland / Seattle and more.](#)**



- Deskside missions: 2 per year in target flight markets
 - **Jan 2020: NYC**
 - **March 2020: Houston / Dallas**
- Media Fams:
 - **Hosted (or confirmed) 3 of 11 domestic, 1 of 8 international full fams, 1 of 8 international mini fams and 2 of 4 influencer FAMS**
- Press releases: issue 4 quarterly "what's new" releases, and up to 4 local releases
 - **Sept releases sent: 1 - *What's New Fall***

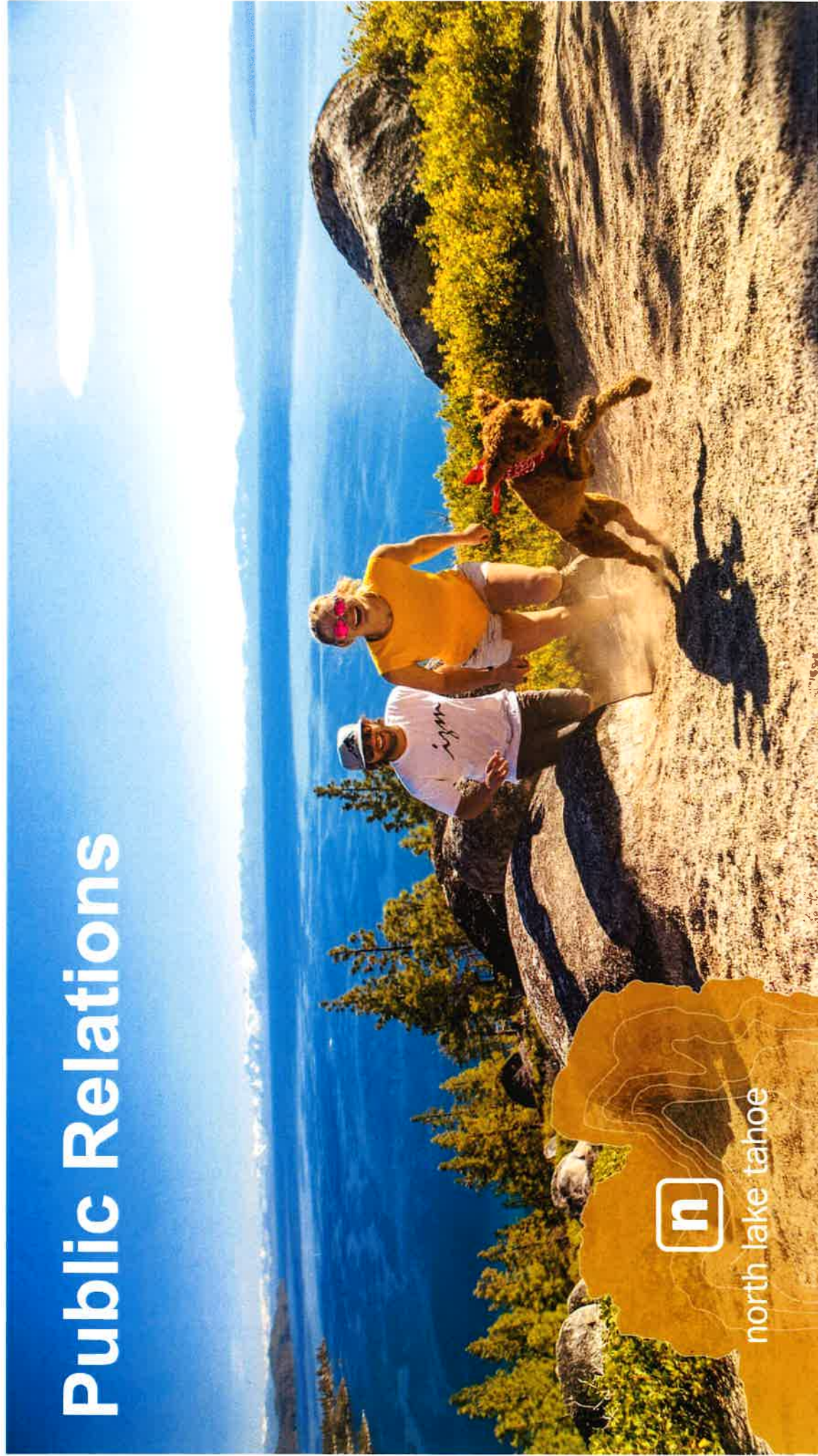
Social Media

- Increase followers: from Bay Area / SoCal by 5 percent
 - **Bay Area**: 1.2% increase in Facebook followers (57 new followers) and 2.12 % increase in Instagram followers (81 new followers)
 - **SoCal**: 1% increase in Facebook followers (209 followers) and 3% increase in IG followers (79 followers)
- Host 4 influencer fams per year
 - **Sept: Johnnie Gall (complete)**
 - **Sept: Dr. Cacinca (in progress)**
- Lives - Conduct 4 FB or IG lives
 - **Sept: 0 lives conducted. Planned lives for year.**
- Giveaways - Conduct 4 giveaways (2 big, 2 small-scale)
 - **Sept: 0 giveaways conducted. Planned giveaways for year.**

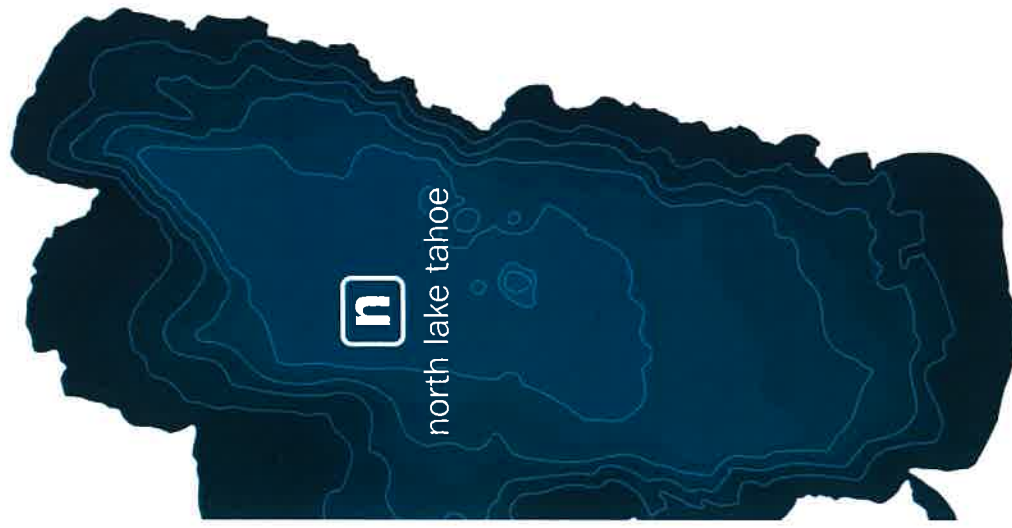
Content

- Blog: goal - 2 per month; completed 2
- Newsletter: goal - 1 per month; completed 1

Public Relations



north lake tahoe



north lake tahoe

PR STRATEGY

1. **Search-driven PR:** The Abbi Agency aims to earn placements in publications with a higher domain rank authority than gotahoenorth. By securing valuable backlinks to gotahoenorth.com, it increases searchability. We will utilize a "champagne media list" to track against the top 50-100 target publications for North Lake Tahoe.
2. **Shoulder season visitation:** The Abbi Agency will push shoulder season messaging (i.e. high-altitude training, scenic hikes, food & beverage, wellness and dual-sport days) to increase visitation in spring and fall. We will leverage the "Tahoe Treasures" campaign to bring awareness around alluring "secrets," and supplement coverage with 4 hosted FAMS per season. We will utilize a quarterly press release to showcase the holistic lifestyle, events and news, year-round.
3. **Midweek Travel + Extended Stays:** The Abbi Agency will leverage direct flight markets, including Southern California, New York and Houston/Dallas to increase length of stay and national brand awareness.
4. **SMARI insights:** The Abbi Agency will increase messaging around destination drivers, including leisure hiking, dining, scenery and value. The Agency will reserve "extreme messages" like ski/ride for niche audiences only.

PR SNAPSHOT

PITCH ANGLES: What's New Fall, Haunted Tahoe, Autumn Food & Wine Festival Coverage, Winter Adventure and Preview, Fall Foliage, Ski Meetings, Wellness Meetings

PRESS RELEASES: The 2019 "What's New Fall" Release was sent out to local, regional and national news outlets.

MEDIA CONVERSATIONS (highlights)

- **Local/Regional:** Moonshine Ink - Submitting for Spooky Tahoe piece; KCRA - broadcasted information about Autumn Food & Wine Festival on their 9/20 newscast, waiting for link
- **National/Industry (flight markets):** The Travelin' Gringo - sent Glen Abbott Donner Pass/Donner Summit per his request. Ongoing pitching to key flight markets of SoCal and NYC.
- **International:** MSI (Germany California Partners) - German trade winter newsletter
- **M&C:** Meetings & Conventions - sent Michael Shapiro photos and more information of Granlibakken, Resort at Squaw Creek and Hyatt Regency Lake Tahoe meeting spaces per his request after initial pitch

DESKSIDES / MEDIA MISSIONS: TAA did not carry out any media missions in September; but confirmed dates for FY20. We will visit New York in January as part of Visit California's International Media Marketplace; and we will visit Dallas / Houston in March 2020.

FAM COORDINATION:

TAA hosted three FAMs in September: 2 journalist FAMs and 1 influencer FAM.

- Jared Ranahan (USA Today 10Best, Forbes, TripSavvy): Autumn Food & Wine Festival; unique outdoor recreation
- Juan Pablo Montes Edgar & Arturo Mateos Ortega (Food & Travel Mexico): food & beverage; outdoor recreation
- Johnie Gall (@DirtbagDarling): sustainability and eco-friendly travel; Tahoe as a dog-friendly destination

TAA is also coordinating three FAMs for October:

- Angela Ligouri + Matthew Massa (Canadian Influencers): October 1-3, 2019
- Andrea Mendoza (Blue & Blanc Mexico): October 24-26, 2019
- Dr. Cacinda Maloney (@pointsandtravel): October 29-31

TAA is working to reschedule Robin Sussman's cancelled fall FAM for spring 2020.



td-6



PR Results

PLACEMENTS: 13

TOTAL IMPRESSIONS: 15,629,445

DOMAIN RANK AUTHORITY (NLT): 56

PUBLICATION HIGHLIGHTS: Los Angeles Daily News, Red Tricycle, Tahoe TAP Podcast, Fox 40, KCRA, San Francisco Chronicle, Allt om Resor (Swedish magazine)

KEY INSIGHTS: TAA saw an increase in coverage locally (including a Tahoe podcast feature) and regionally (especially in Sacramento) surrounding the Autumn Food & Wine Festival and the Spartan World Championship Race, aligning with our goal to promote and highlight NLTRA events to our local and drive markets.

COVERAGE BOOK: <https://coveragebook.com/b/d55444ae>

Placement Highlights

Los Angeles Daily News Travel: Lake Tahoe's Relaxing Side Points North

- Reach: 1,140,000
- Ad Value: \$10,545
- Domain Rank: 80
- Social Shares: 0



Fox 40 Sacramento Lake Tahoe Autumn Food and Wine Festival Preview

- Reach: 780,154
- Ad Value: \$7,216.43
- Domain Rank: 75
- Social Shares: 0



San Francisco Chronicle Now is the Perfect Time to Visit Lake Tahoe

- Reach: 6,560,000
- Ad Value: \$60,680
- Domain Rank: 84
- Social Shares: 9



Social Media



xd-9

Social Media Approach

CHANNELS: Facebook, Instagram, Twitter, YouTube, Pinterest

STRATEGY: Use content campaigns (like Treasures of Tahoe), giveaways, and engaging user-generated content to increase awareness of lesser-known summer activities and increase overall engagement.

OBJECTIVES:

- **Instagram:** Maintain a 5-7 % engagement rate month over month (this is *very high*, compared to industry average of 2-3 percent)
- **Facebook:** Maintain a 3-4% engagement rate month over month (the industry average for all types of content is 3.91%)
- **Twitter:** Maintain an average engagement between 0.09% and 0.33% (industry standard)
- **Increase overall followers** by at least 0.5% monthly



FOLLOWER + ENGAGEMENT INSIGHTS:

Total followers increased by 0.5% from the previous month, with Instagram seeing the highest growth with a 1.4% increase. Overall engagements are up 5% with Instagram engagements in particular up 29%.

This in large part due to our highest performing post of all time being posted during the month of September (see slide 12 for more).

Growth + Campaigns

September growth:

- Facebook: 78 new followers
- Instagram: 990 new followers
- Twitter: 78 new followers

Total Impressions: 4,980,475

Total Engagements: 127,454

Campaigns:

NLT Alpine Challenge

- Impressions: 157.8k
- Engagements: 4,075

Top Posts by Engagement

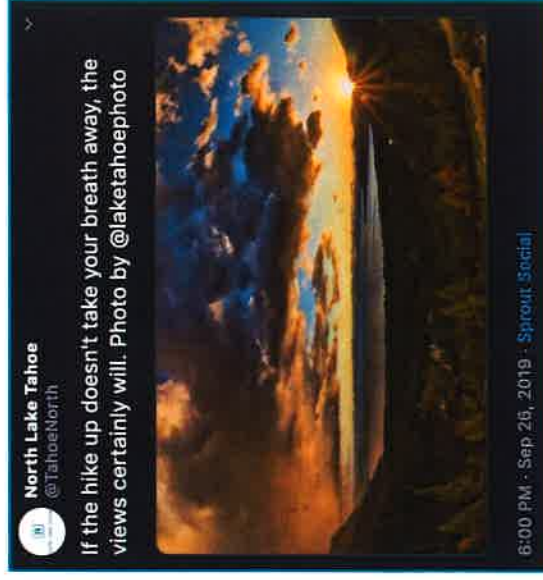
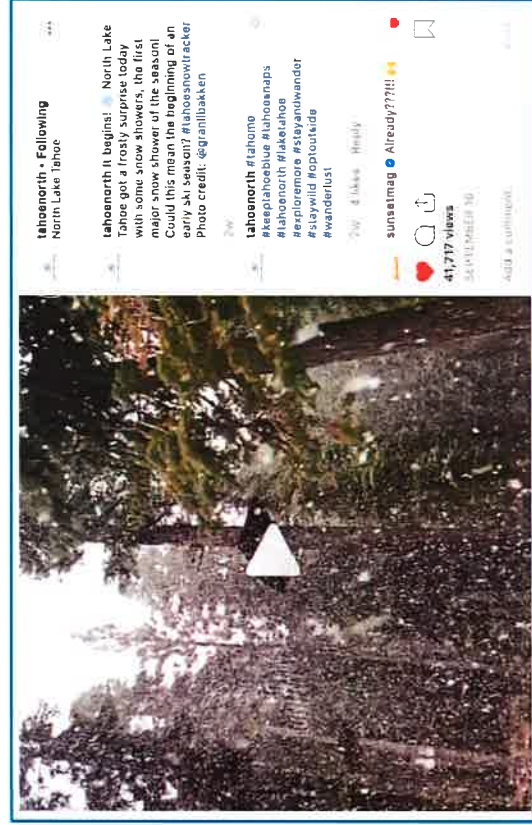
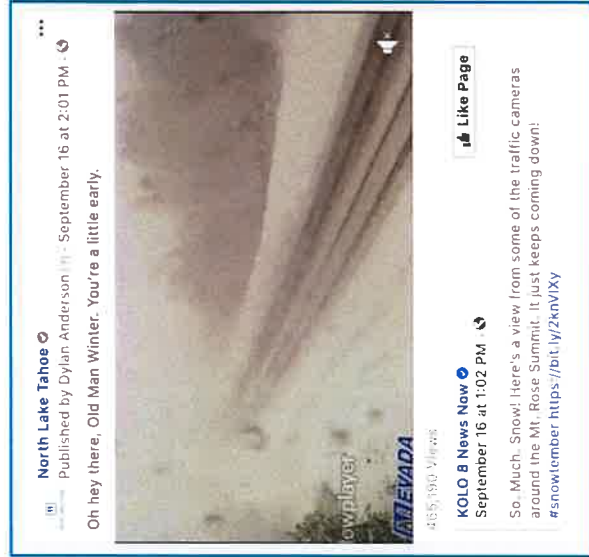
#1 Facebook Post: First Snow Video Share - 814 reactions, 225 comments, 274 shares

#1 Instagram Post: First Snow Video - 11,653 likes, 489 comments, 419 saves

#1 Twitter Post: Sunrise UGC - 62 likes, 9 retweets, 1 replies

KEY TAKEAWAY

User generated content and aspirational, scenic imagery continues to perform the best. According to Hootsuite, posts containing or featuring UGC has a 4.5% higher conversion rate than non-UGC posts.



xd-12

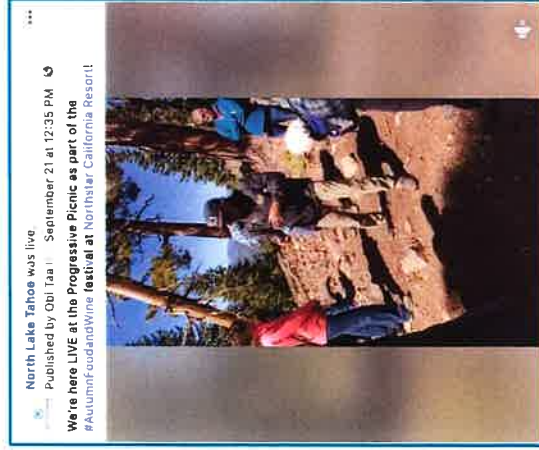
Autumn Food and Wine Festival Coverage

North Lake Tahoe promoted the Autumn Food and Wine Festival through social posts, a blog, a giveaway on both Facebook and Instagram, and live stories and Facebook Live.

Impressions: 69.6k

Engagements: 1200

Live Views: 1.1k



GET READY TO FALL IN LOVE WITH DINING IN NORTH LAKE TAHOE

You know that North Lake Tahoe's breathtaking views, vast water escape, and endless recreational activities are incredible. What you may not know is that the crown jewel of the Sierra Nevada is *also* home to some of the best culinary delights in the region, with dozens of home-grown restaurants, celebrated restaurateurs, plus bites and sips from every cuisine you could think of.

In fact, our mountain paradise is so beloved for its food and beverage scene that it has long served as the home to the annual Autumn Food and Wine Festival—which marks its 34th year, September 20–22.

But rather than simply telling you about how great Tahoe's culinary scene is, we thought we'd showcase some of the most delicious and unique dining opportunities in the region. That way, while you work up a hefty appetite, you can plan your tour of Tahoe's best bites as part of your North Lake Tahoe adventure. Check it out!



Influencers - Johnie Gall (Dirtbag Darling)

As part of North Lake Tahoe's promotion of the fall shoulder season, Tahoe North activated a blogger, photographer, and environmental advocate by the name of Johnie Gall to experience the best of North Lake Tahoe in the fall. Johnie's content pillars included outdoor recreation, as well as sustainability and environmentally-friendly activities.

- # of Posts: 3
- Post reactions: 4,065
- Post comments: 18



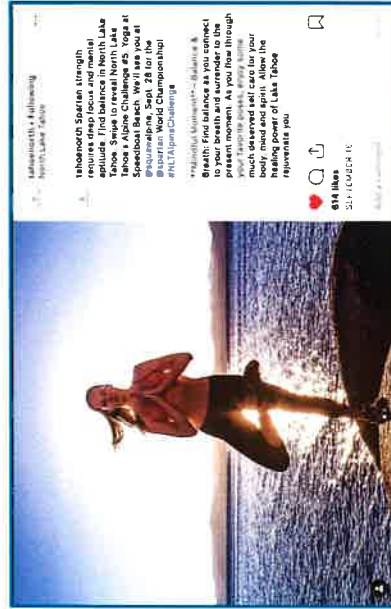
NLT Alpine Challenge

To promote the upcoming Spartan Race, North Lake Tahoe created an owned workout plan to engage the audience to partake in health and fitness, inspired by the Spartan athletes, while seeing the best of North Lake Tahoe. A blog post accompanied social graphics. The campaign began in August and continued on into September.

Total Impressions: 157.8k

Total Engagements: 4,075

Total Reach: 89.1k



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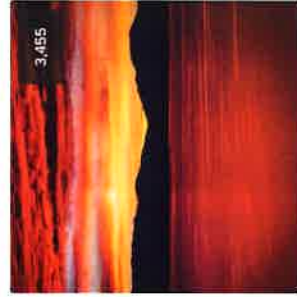
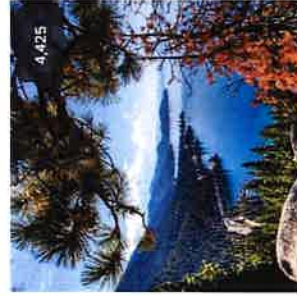
Instagram Story Highlights



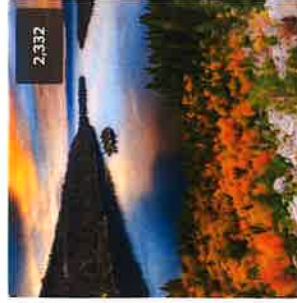
Total Story Impressions for August: 110.9k impressions ; Average Reach per Story: 2,730

Instagram Competitor Set

Most Popular Media by tahoenorth

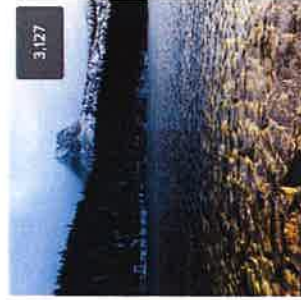


Most Popular Media by tahoesouth

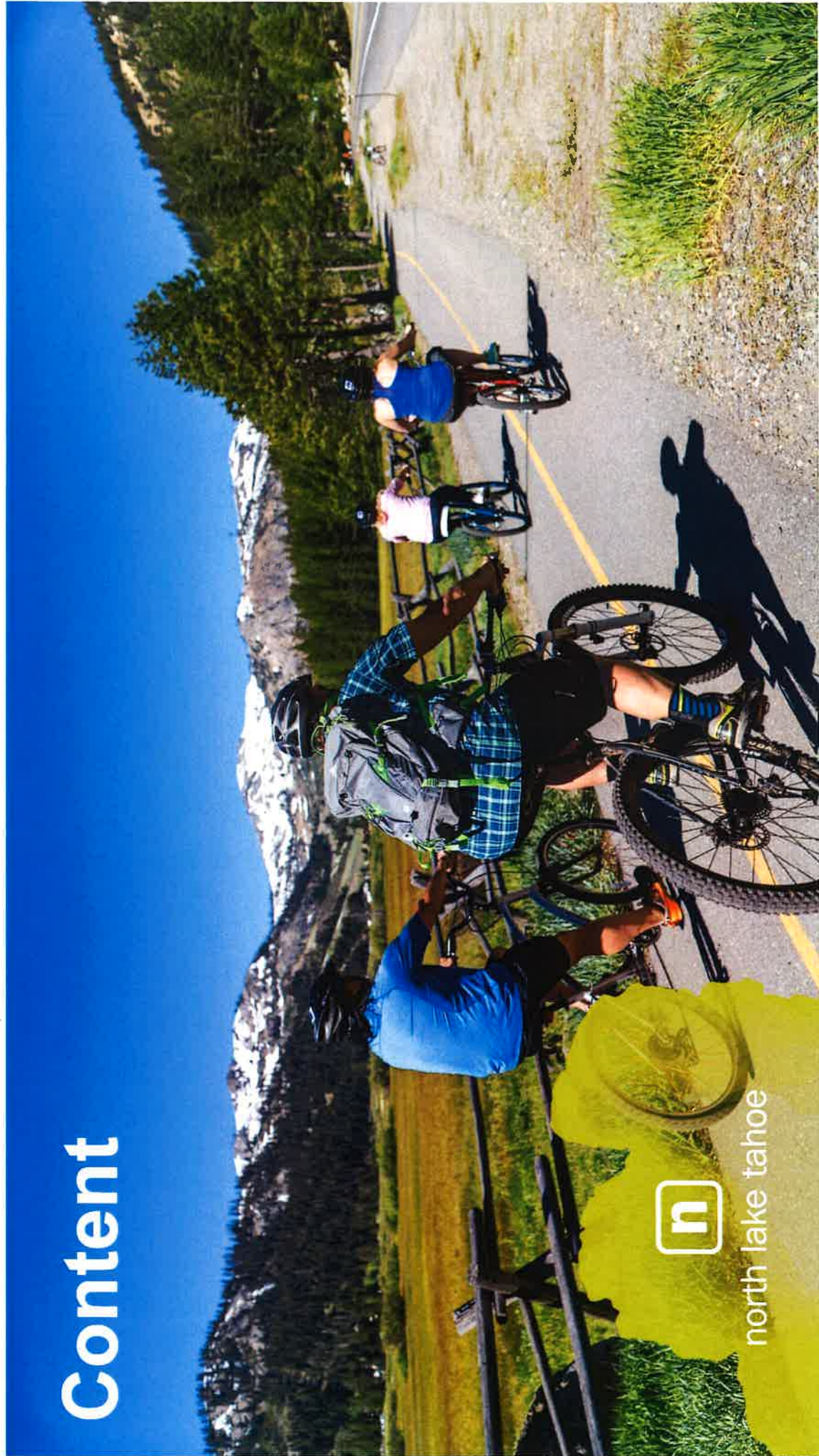


In September, @tahoenorth received more engagements (68.4k) than both @tahoesouth (37.3k) and @visitmammoth (37k). Additionally, Tahoe North has the largest following of both of our competitors.

Most Popular Media by visitmammoth



Content



north lake tahoe

Content Approach

Overall Strategy: The Abbi Agency has shifted its content strategy by **1) creating evergreen blog messages** to provide consumers with messages that are beneficial year-round; and **2) reserve news-sensitive information for monthly newsletters**. The Abbi Agency has analyzed North Lake Tahoe's brand voice and tone, and has proposed a more identifiable "character" in which all content contributors can represent. We aim to create a "Tahoe experience" in all levels of the decision making funnel. We want North Lake Tahoe's voice to be undeniably "Tahoe," with a laid back, outdoor driven, aspirational feel. We are also beginning to strategize more granular content per channel, to better segment messages to fly/drive market audiences.

BLOG AND TRIP IDEAS: The Abbi Agency has proposed moving blogs away from "events-based marketing" and focusing primarily on evergreen content—while at the same time maintaining our commitment to highlighting partners, experiences and NLTRA commitments. In this way, we create aspirational messages that are useful to consumers, year round. With two blogs per month, each is designed to **improve SEO, increase brand awareness** (especially during secret seasons) and **provide educational content**. Most blogs range from 600–800 words (a length that Google deems valuable), while reserving a few pieces for longer-form "essay content," like "52 Weeks in North Lake Tahoe" (about 1,200 words).

NEWSLETTER:

The newsletter takes a more "news and events" approach, highlighting current and upcoming events, driving bookings and encouraging users in our flight and drive markets to stop what they're doing to *explore North Lake Tahoe* as its offerings change throughout the seasons.



Blogs & Newsletters

KEY THEMES: Shoulder season activities, Tahoe Dining, preview to après, preview to winter

CAMPAIGNS: Autumn Food and Wine, Tahoe Arts and Culture, Secret Season



NEWSLETTERS POSTED: 1

Get Ready to Fall In Love With Tahoe Flavor
9.2 open rate | 0.7 CTR

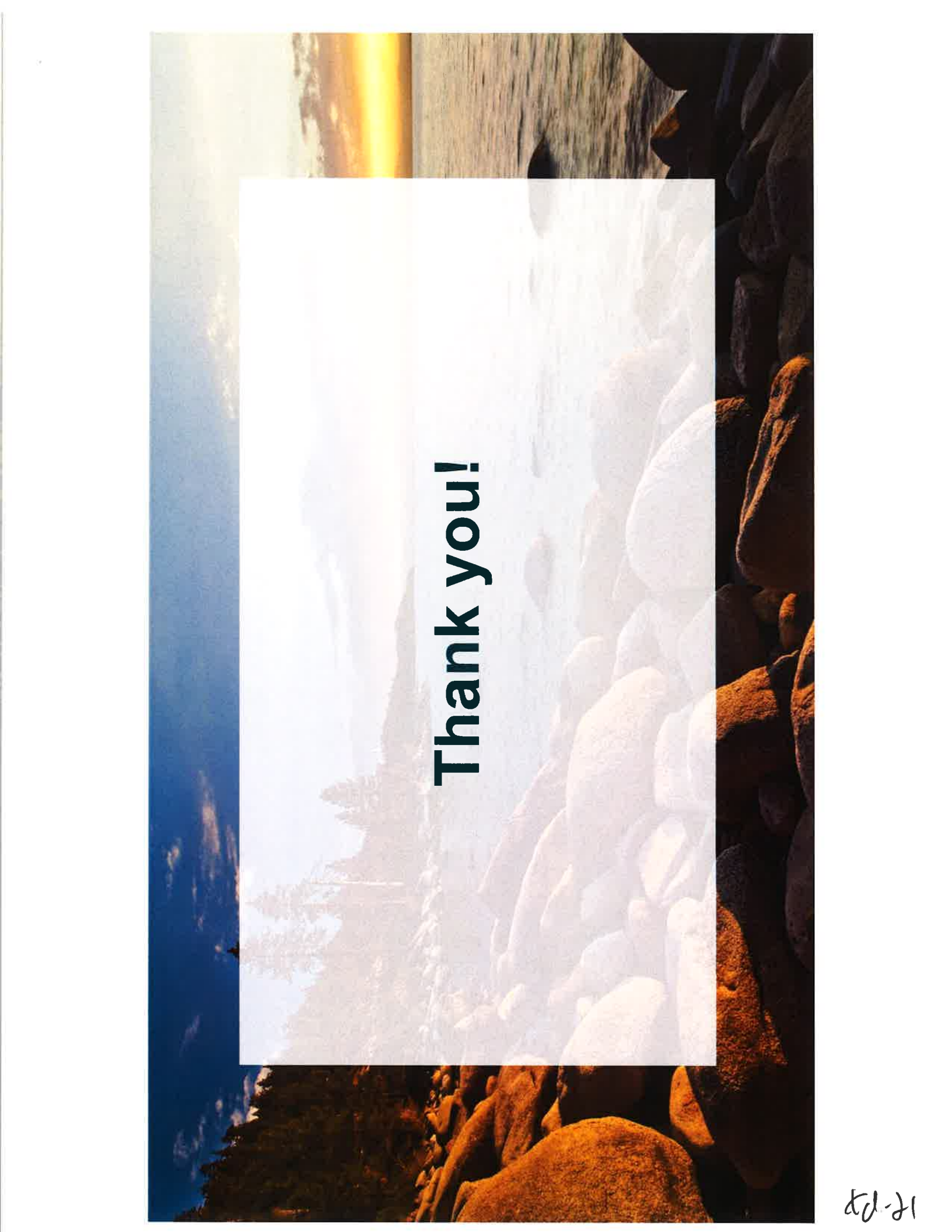
BLOGS POSTED: 2 (2 general, 2 Tahoe Treasures)

Get Ready to Fall in Love With Dining In North Lake Tahoe
54 Social Shares | 93 Blog Views

Your Guide to Autumn Arts and Culture in North Lake Tahoe*
24 Social Shares | 30 Blog Views

* Developed in September, published on Oct. 3.

08-20



Thank you!

Summary:

Thunderbird lodge tours have ended for the season. Visitor counts and Thunderbird ticket sales were up significantly this summer. Staffing has been adjusted to account for the decrease expected in visitor counts.

Staffing:

- Seasonal staff have ended their summer employment at the Bureau

Operations:

- Security camera installation
- Working with Activity Tickets for improved visitor experience on site
- Unemployment insurance audit completion

Projects:

- Replaced furnaces at Visitors Center
- Starting Northern Lights planning
- Starting revise of Trails brochure
- GoTahoeNorth website adoption and site re-skin
- New cost saving health insurance plan
- Manage FB/Instagram advertising for premiere partners

Meetings attended:

- RTT meetings
- DMA West conference in Sacramento
- BACC Meeting, Tahoe City
- Marketing cooperative meeting

Sales Department Report for September 2019

Staff – Bart Peterson – Business Development Manager

Leisure

September 3-6 attended Mexico Sales Mission with Travel Nevada where I met with top tour operators, travel agents, airlines, trade media and key industry partners. We hosted trade shows at the HQ's of the main Mexican OTA's (Best Day Travel & Price Travel) in Cancun. Afterwards we continued the Sales Mission in Mexico City, where we hosted two main events, one VIP dinner with the main Travel Associates & Airlines and a brunch with Julia Tours Top Agencies, Trade Media and Influencers. All together we met with and trained (10) agents from Al Mundo, (43) agents from Travel Impressions, product managers of Viajes Palacio (Mexico's top travel retailer), (10) agents from Ofertas Turisticas, (100+) agents from Best Day and (4) product managers from Price Travel.

September 12 – hosted bicycling journalist, Rob Annis on the Flume Trail, East Shore trail and Alibi.

September 16-18 attended Active America China Receptive Conference in LA where I met with (30) receptive operators and distributed those leads to our partners.

September 26 – Hosted Travel Nevada FAM where we hiked around Sand Harbor, walked the new East Shore Trail and hosted lunch at Alibi to tie the experience into our Ale Trail.

Conference

Hosted site tour for 2021 Associated Builders & Contractors program at Hyatt, Resort at Squaw Creek and Ritz Carlton. This program would bring (242) room nights and roughly \$60,000 in revenue

Program turned definite for the Hyatt - NHS Global Events – Samsung Mobility Reseller Incentive – 1/17/20-1/20/20. 72 rooms.

Distributed Leads for the following:

Kimley-Horn & Associates – 7/15/20-7/18/20. 2020 Planning Meeting. 80 Rooms.

ASME 2020 LX Summit – 8/9/20-8/11/20. 180 rooms.

AJG 2020 Insurance Housing Conference – 9/27/20-10/1/20. 245 rooms.

Generis – June 2021 Associates Meeting. 6/14/21-6/18/21. 188 rooms.

Fabricator & Manufacturers Association - FMAC Board of Dir Mtg, 2021. 6/6/21-6/10/21. 89 rooms.

Major County Sheriffs Association – 2023 Summer Meeting. 6/11/23-6/15/23. 380 rooms.

National Association of American Indians – BIA/TIBC Meeting. 7/12/20-7/17/20. 160 rooms.

ALTOUR – CohnReznick Capital Offsite 2020. 9/8/20-9/11/20. 72 rooms.

E-Squared – September 2020 Meeting & Retreat. 9/20/20-9/22/20. 90 rooms.

GIP (Global Infrastructure Partners) – 2/26/20-2/29/20. 240 rooms.

Anthroscopy Association of North America - July 2021 BOD Meeting – 7/13/21-7/18/21. 96 rooms.

Computrition – 40th Anniversary Event – 3/21/21-3/24/21. 230 rooms.

Activity Tickets - Carson City Symphony Product built

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President/CEO Report
Activities Report
October 23rd, 2019

- NORTH LAKE TAHOE MARKETING COOPERATIVE
 - Oversee agency efforts on behalf of the coop funding partners
 - Development of winter consumer marketing campaign
 - Review and approve Coop invoice billing and payments
 - Met with consumer web team to develop and implement revision strategies
 - Participating in NLTRA's CEO hiring committee
 - Finalizing FYE 2018/19 Coop expenses
 - Work with NLTRA auditors on FY 2018/19 Coop Financials
 - Review and analysis Conference Sales bookings
 - Reviewed SMARI research results
- PROJECTS
 - Work with Reno Tahoe Territory on International Public Relation project
 - Working with partners on VisitingLakeTahoe.com future efforts
 - Worked with Tahoe Filmfest producers on this year's program scheduled for December 6-8
 - Worked with partners on Out of Bound Film release and premiere
 - Appointed as board member of DMA West for 2-year term
 - Developing RASC Chair platform positioning
 - Working with RASC on Minneapolis air service opportunity
- MEETINGS
 - Attended Sales Staff meetings
 - Attended Vendor status meetings
 - Attended TMA meeting
 - Attended Reno Tahoe Territory Board meeting
 - Attended NLTRA Board meeting
 - Attended NLT Conference Sales Director meeting
 - Attended DMA West Education Summit
 - Attended NLT Marketing Cooperative Meeting
 - Attended NLT Leisure Sales Task Force Meeting
 - Attended Tahoe Prosperity Center Economic Summit