



north lake tahoe

NORTH LAKE TAHOE MARKETING COOPERATIVE MEETING

Agenda

Wednesday, April 26th, 2017 – 10:00 am

Call in information:

Call in number: 712-770-4010

Meeting ID: 961-748

The November meeting of the North Lake Tahoe Cooperative Marketing Committee will be held on Wednesday, April 26th at 10:00 A.M. The meeting will be held in the conference room of the **Incline Village Crystal Bay Visitors Bureau located at 969 Tahoe Blvd, Incline Village, NV 89451.** Phone: (775) 832-1606.

PUBLIC COMMENTS—Public comment will be at the beginning and end of the 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 clerk at the meeting. Public comments may not be accepted after the chairman closes any period for public comment.

- | | |
|---|----------|
| A. Call to Order | Chair |
| B. Public Comment (Pursuant to NRS 241.020) | Chair |
| C. Roll Call/Introductions | Chair |
| D. Approval of Agenda (For Possible Action) | Chair |
| E. Approval of March 29 th Coop Meeting Minutes
(For Possible Action) | Chair |
| F. STRATA / LA Ad Recall Study Review | Thompson |

- | | |
|---|------------------|
| G. Review of Consumer Marketing/Location Attribution Report | Augustine Ideas |
| H. Discussion on Consumer Marketing Strategy | Thompson/Chapman |
| I. Review of PR & Social Efforts | The Abbi Agency |
| J. Discussion on PR & Social Media Strategy | Thompson/Chapman |
| K. Review and possible action on FY 2016-2017 budget reforecast
(For possible action) | Thompson |
| L. Review and Discussion on FY 2016/2017 YTD Financials | Priester/Chapman |
| M. Update on PR & Social Media and international RFP's | Thompson |
| N. New Business | Chair |
| O. Old Business | Chair |
| P. Public Comment (Pursuant to NRS 241.020) | Chair |
| Q. Adjournment (For Possible Action) | Chair |

Physically disabled persons desiring to attend this meeting should contact Anna Atwood at 530-581-8722

Public Posting

Incline Village Post Office
 Crystal Bay Post Office
 Incline Village Crystal Bay Visitors Center
 North Lake Tahoe Resort Association

IVGID
 Incline Justice Court
 Meeting Location



north lake tahoe

NLT Marketing Cooperative Committee Meeting Minutes – Wednesday, March 29, 2017

The North Lake Tahoe Marketing Cooperative Committee Meeting was held at the Tahoe City Visitors Information Center.

1.0 CALL TO ORDER

1.1 The meeting was called to order at 8.37am and a quorum was established.

2.0 PUBLIC COMMENTS

2.1 No public forum.

3.0 ROLL CALL

3.1 Committee members present: JT Thompson, Andy Chapman, Christine Horvath, Bill Wood, Andy Chapman, Sandy Evans Hall, Carlynn Fajkos (called-in), Brett Williams (called-in at 9.15 am)

Other in attendance: Liz Bowling, Alexis Kahn, Lindsay Moore

4.0 APPROVAL OF AGENDA

4.1 **M/S/C (Chapman/Horvath) (5/0) to approve the agenda as presented.**

5.0 APPROVAL OF NOVEMBER 17, 2016 COOP MARKETING MINUTES

5.1 **M/S/C (Chapman/Evans Hall) (4/0/1 – Wood abstained) to approve the November 17, 2016 Marketing Cooperative Minutes.**

6.0 REVIEW OF CONSUMER MARKETING EFFORTS

6.1 Alexis shared some of the Advertising efforts done from December, 2016 and February, 2017. Creative assets were developed for both the consumer and Meetings & Conventions markets. Some of the projects included:

- Winter focused E-blast
- Digital assets for winter campaign
- Website sliders to be winter focused
- World Cup full page ad for event program & World Cup 30 second video for event screen
- Meetings & Conventions 30 second video highlighting event venues and activities

Incremental spend items continued to run this month, targeting the LA market. Items included: Outdoors billboards, Second Weekend Sherpa promotion, E-mail prospecting campaign and Facebook Live promotion.

Consumer Advertising and Meetings & Convention – Executive Summary:

- GoTahoeNorth.com witnessed a 110% increase in traffic directly from ads in February, resulting in a 15% increase in book now conversions and an 8% increase in overall web traffic. Digital ads contributed 43% of the total traffic to site.

- Social ads drove more book now conversions than any other ad medium, with over 1.1K users clicking on the book now button after viewing an ad. Facebook ads targeted toward younger experience seekers were particularly effective, resulting in over 400 book now conversions.
- Across all mediums, ads targeted towards users in Los Angeles featured the lowest cost per conversions figures (\$76), followed by New York (\$104), and Austin (\$162).
- Weekend Sherpa and E-mail advertising drove the highest quality web traffic, with users from both sources spending over 1:30 on the site and viewing over three pages per session.
- World Cup Program Ad had had a unique URL GoTahoeNorth.com/WorldCup. More than 700 people clicked through on this website.
- E-mail blasts continued to drive the highest quality web traffic to North Lake Tahoe's web page, with users spending nearly two minutes on site and viewing nearly four pages per session. A Facebook retargeting video implanted this month proved to be effective in driving a higher click through rates, with 1.12% of users click on the ad compared to the 0.66% click through rate of normal ads.

Comments:

- A member requested the open rate on the Weekend Sherpa e-mail advertising campaign? (or combined campaigns or by months)
- Keep a monthly count of new e-mails subscriptions/sign ups.
- How do we target ads differently family versus active and relaxation? Alexis shared this is information she can get from Walt.
- Brett question the success rate or failure rate on some of the newer flights. Are we seeing success were we were hoping for? JT will get some of this information before the RASC Board Meeting on April 11, 2017.
- Brett recommended for spring & summer message strategy that it's important to message to families about our great spring ski conditions. Get the Spring Deals out.

Action to Lindsay/Walt from Augustine/Richter 7: Open rate on the different advertising campaigns or combined. How do we target ads differently family versus active and relaxation?

Action to JT: Keep a monthly count of new e-mails subscriptions.

Action to JT: Follow up with RASC for numbers on some of these newer flights. Are they successful?

7.0 REVIEW AND DISCUSSION ON PR & SOCIAL EFFORTS – THE ABBI AGENCY

- 7.1 Liz reviewed a February recap including: Public Relations Results, Content Review, Social Media Update and Tahoe Locals Campaign.

Public Relations Review:

- 21 Placements with a Publicity Value at \$366,824
- Publication Highlights: SF Gate, Yahoo.com, MSN.com, Visit CA Blog, L.A. Times
- FAM Coordination: JetBlue, Ski Trax, Ski Magazine, Jenny Hart (Freelance), Mpora/Whitelines (UK), VICE/Amuse (UK), Trinity Mirror (UK), Ski & Snowboard Magazine (UK), Escape (Aus)
- Notable Pitches: Beach Round-Up for CNN, Meetings Today, Outside Magazine, Wellness/Wanderlust, WWG outreach, Collaboration with South Lake Tahoe – weekly road conditions alert
- Coverage Book: <https://coveragbook.com/b/e211a4ad>

Content Review:

- Press Releases/Media Alerts Issued: 4. The Inside Guide to Spring Break in North Lake Tahoe, Valentine's Day Dates in North Tahoe, Road/Weather Conditions alert, Autumn Food and Wine Donations
- Blog Posted: 3. Valentine's Day Date Ideas, 17 Trip Ideas for Spring Break, WinterWonderGrass
- Newsletter Distributed: 3. Valentine's Day, Spring Break, WinterWonderGrass

Social Media Update:

- February Growth: Facebook: 2,247 new fans; Instagram: 787 new followers, Twitter: 370 new followers
- Social Campaigns and Tactics: Facebook Live, Instagram Takeover with North Lake Tahoe local, Hannah Thorton and implementation of #TahoeSnowTracker.

- Winter Fan Acquisition Campaign: Goal: Promote North Lake Tahoe as the idea winter destination, increase page likes in flight and drive markets. Budget: \$4000. Duration: January 9-February 9, 2017. Results: Reach: 226,984 and New Pages Likes: 9,822.

Tahoe Locals Campaign:

- Douglas Dale, Chef-Owner of Wolfdales Cuisine Unique, Tahoe Local for 40 years, Brand Category: Food/Culture, Film Date: March 1
- Jenni Charles. Lead Singer of Dead Winter Carpenters, Tahoe Local (grew up here), Brand Category: Music/Entertainment, Film Date: TBD
- Adrian & Emily, Outdoor Adventurers; World Class Mountaineers, Tahoe Locals (live in Squaw Valley), Brand Category: Adventure, High Altitude Training, Film Date: June
- Liz shared the last Tahoe Locals will be Arts & Culture. This is something she is still working on.
- These Tahoe Locals Campaign will be distributed on North Lake Tahoe Social Media & Content Channels, GoTahoeNorth website.
- It would be great to work with Visit California and Travel Nevada on the distribution of the Tahoe Locals Campaign.

Comments:

- Mobile apps were suggesting people take roads that were closed and that is why the weekly road conditions alert started.
- One member suggested that the sign on Interstate 80 in Sacramento be changed from Reno to North Lake Tahoe. (Highway 50 says South Lake Tahoe). Sandy suggested forming a partnership with LTVA, Truckee, North Lake Tahoe and Visit California.
- JT shared with Liz that Marguerite can help with multi-cultural talent for the photo shoot.
- Bring in some of the history and folklore, wooden boat show for the last Tahoe Local Campaign.
- A couple of names were recommended for this campaign: Local Luminaries and North Shore Locals

8.0 REVIEW AND DISCUSSION ON FY 2016/2017 YTD FINANCIALS – PRIESTER/CHAPMAN

- 8.1 Andy reviewed the Profit and Loss Budget vs. Actuals (July through February) with the committee members. He pointed out some of the line items that shows the Coop is underspent, but this is a timing issue. Andy will meet with JT at the end of March and April to project numbers to the Fiscal Year End. Last year's carry-over was \$61,000 was a little high and he stated he would like to make sure this doesn't happen again.

9.0 DISCUSSION AND POSSIBLE ACTION ON PUBLIC RELATIONS & SOCIAL MEDIA RFP

- 9.1 JT stated the RFP for Public Relations & Social Media goes out for contract every 3 years. He reviewed the Public Relations & Social Media Overview and Scope of Services Desired with the members. It was recommended in the contract term be changed from one to 3 years as it may keep companies hesitant to participate if it's only one year. Please provide feedback by Thursday, March 30th by 5 pm. It was recommended since this item was not brought forward to the marketing committee an e-mail vote take place so this can go in front of Board of Directors next week. JT will be reaching out and discussing these RFP's with each individual Marketing Committee Member. A sub-committee will be set-up to make final decisions.

10.0 DISCUSSION AND POSSIBLE ACTION ON INTERNATIONAL REPRESENTATION IN UK & IRELAND AND AUSTRALIA & NEW ZEALAND

- 10.1 Andy questioned if the contracts were preciously both Travel Trade & PR. JT shared they will now be more Travel Trade specific. He would like for us to have more control over the PR inquiries and the Trade representatives always refer back to us for media. Please provide feedback by Thursday, March 30th by 5 pm and it was recommended that an e-mail vote take place. JT will be reaching out and discussing these RFP's with each individual Marketing Committee Member. It was recommended that item all 3 RFP's be a joint motion.
- 10.2 **M/S/C (Chapman/Horvath) (6/0) to proceed with Public Relations & Social Media RFP and Travel Trade for UK & Ireland and Australia & New Zealand RFP and for this committee and the Marketing Committee to provide any updates or feedback by end of day Thursday, March 30th by 5 pm.**

11.0 WEBSITE USER CONVERSION STUDY

11.1 Our organization participated in a website user website conversion study with destination analyst through DMA West. This provides some valuable information and JT recommended that the committee members read through it. There were some questions on average length of stay and average spend being low. Our organization completed a summer intercept survey and Christine shared Squaw has a winter intercept survey along with an e-mail survey that could be used to look up that information as well.

12.0 NEW BUSINESS

12.1 Next Marketing Coop meeting will be scheduled for April 26th or 28th. JT shared we have a new Marketing Coop Sales Staff meeting twice a month starting tomorrow.

13.0 OLD BUSINESS

13.1 None

14.0 PUBLIC COMMENTS

14.1 None.

15.0 ADJOURNMENT

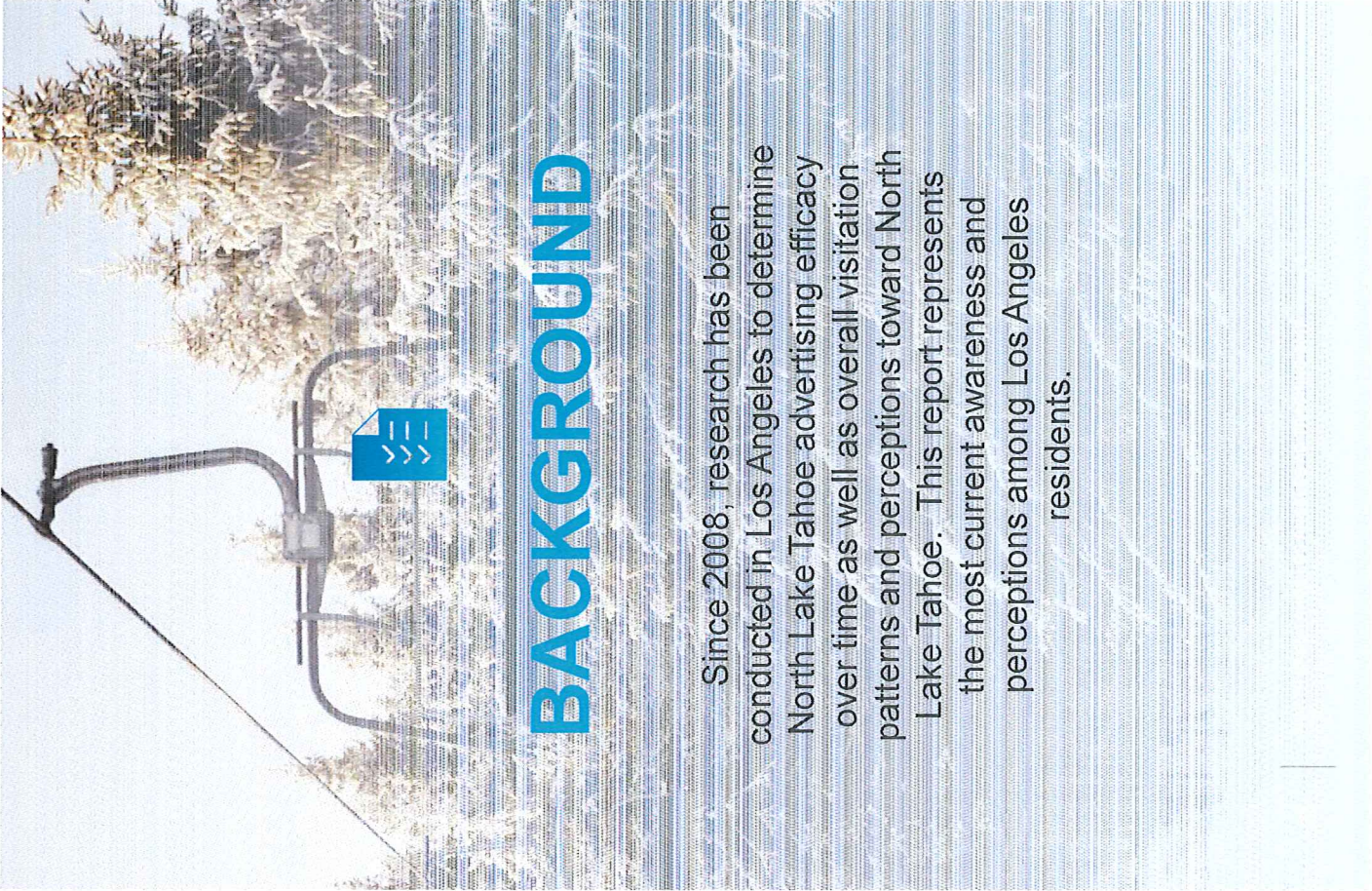
15.1 The meeting adjourned at 10.35 am.



**NORTH LAKE TAHOE
LOS ANGELES AD
TRACKING 2017
EXECUTIVE REPORT**

Prepared for
North Lake Tahoe Visitors' Bureau
April 2017

Prepared by
Strata Research



BACKGROUND

Since 2008, research has been conducted in Los Angeles to determine North Lake Tahoe advertising efficacy over time as well as overall visitation patterns and perceptions toward North Lake Tahoe. This report represents the most current awareness and perceptions among Los Angeles residents.

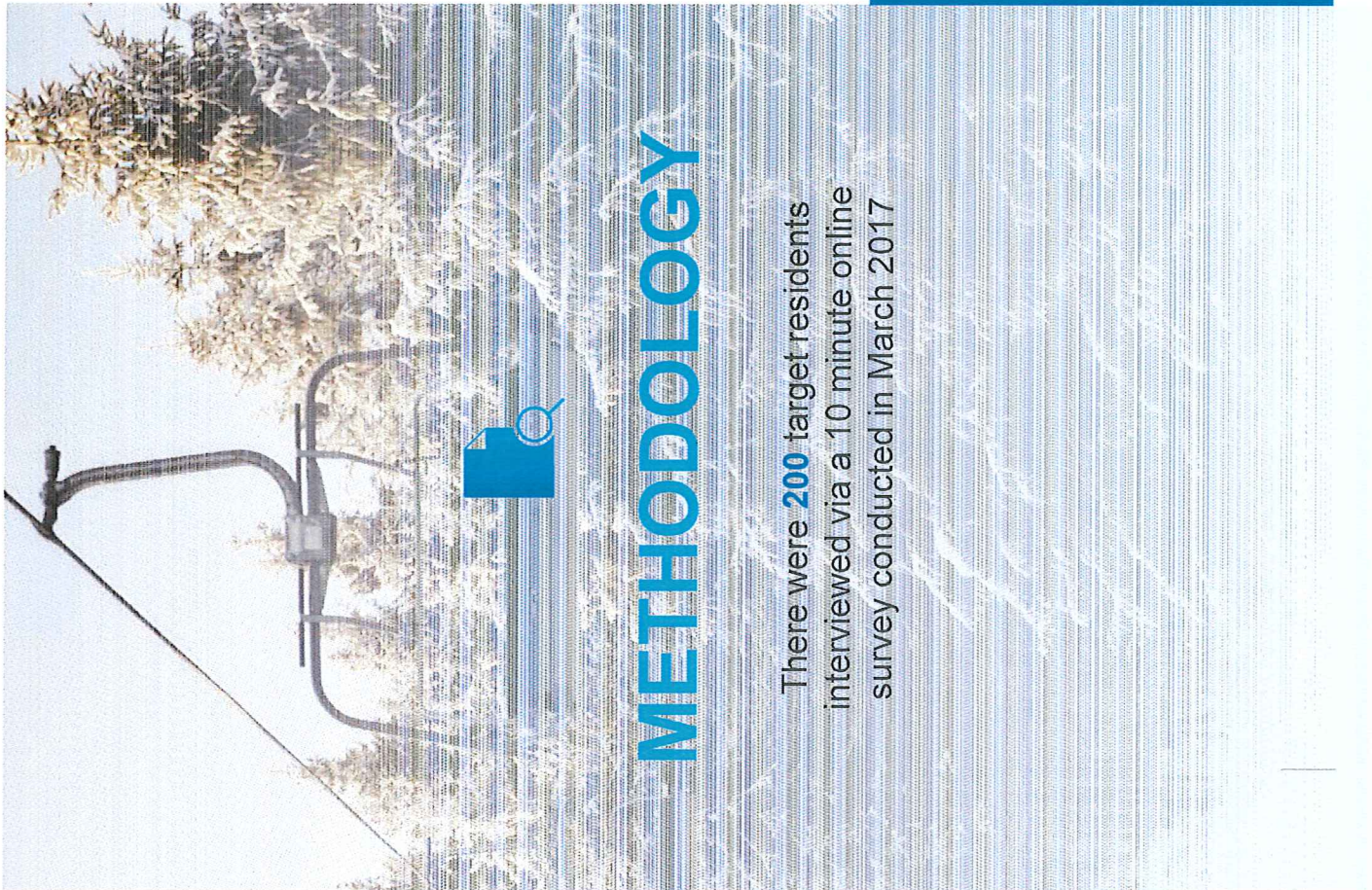
In specific, this research set out to:

Understand resort awareness and visitation, to include North and South Lake Tahoe preferences and perceptions

Learn of travel preferences, including year round activities

Gauge awareness and brand perception of North Lake Tahoe

Track and trend any differences from previous research



METHODOLOGY

There were **200** target residents interviewed via a 10 minute online survey conducted in March 2017

Participants were screened to have the following criteria:

Adults 25 to 54 years of age

With a HHI of \$75K or more

With a propensity to visit a mountain destination within the past year

As well as those who have a propensity to visit Lake Tahoe as a winter or summer vacation destination

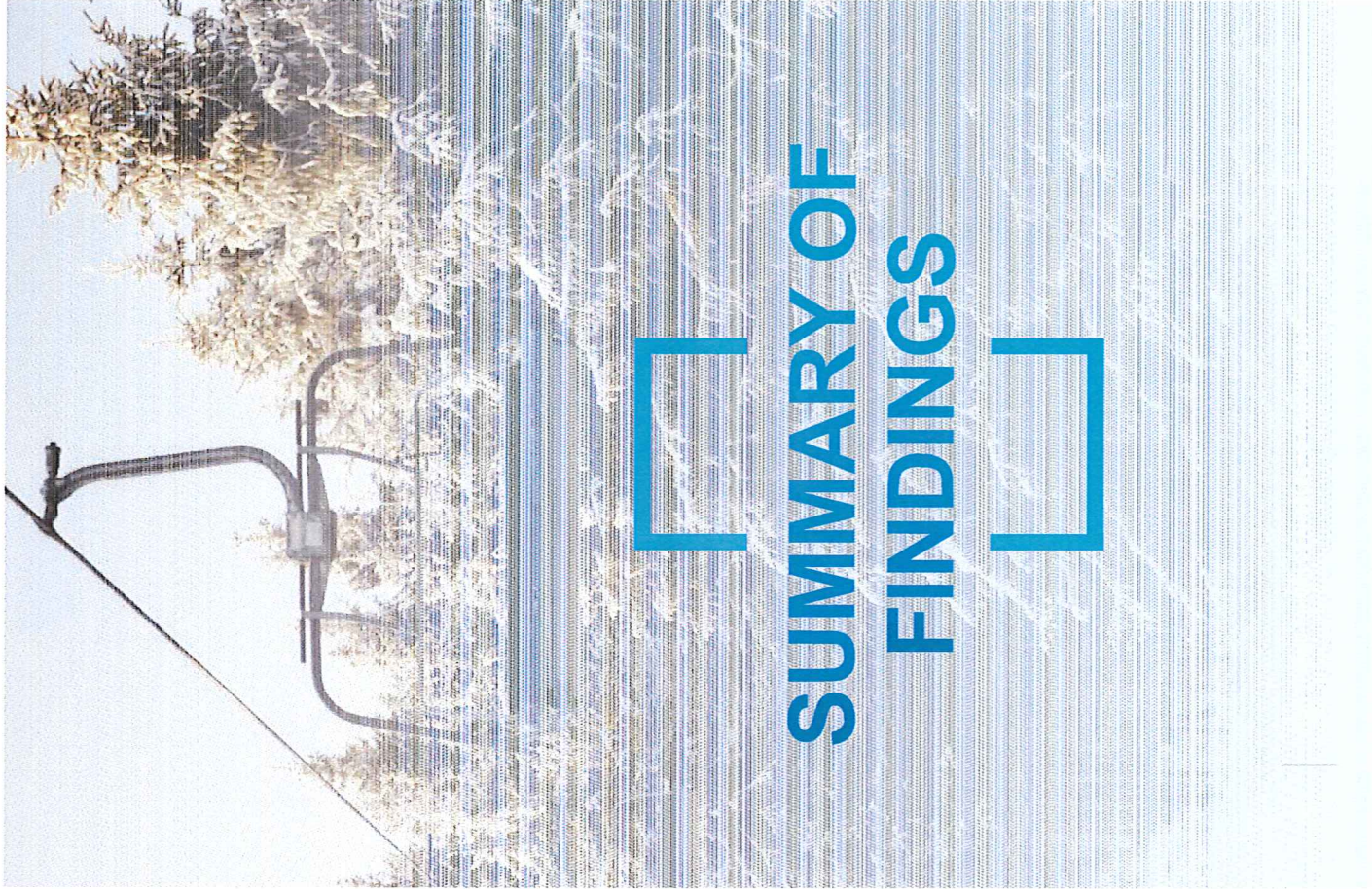
Who live in the Los Angeles DMA

Throughout this report, we will denote findings that are statistically significant at the 95% confidence level, an industry standard

Some percentages may not add up to 100% due to rounding

SUMMARY OF FINDINGS





North Lake Tahoe is a top competitive resort destination, particularly compared to South Lake Tahoe

- Compared to other competitive destinations, North Lake Tahoe was considered much better by 2 to 1
- The region being generally better, while having beautiful scenic views, were why its competitively better
- Compared to South Tahoe, North Lake Tahoe resort awareness remained similar to 2011, while South Tahoe awareness declined significantly

The North Lake Tahoe's 2017 ad campaign was significantly more successful than any of the earlier campaigns

- Unaided recall of any North Lake Tahoe ads doubled since 2011
- Ad recall of the specific North Lake Tahoe assets increased dramatically since 2011, most notably from Internet and billboard
- As a result, likelihood to visit North Lake Tahoe doubled compared to 2011

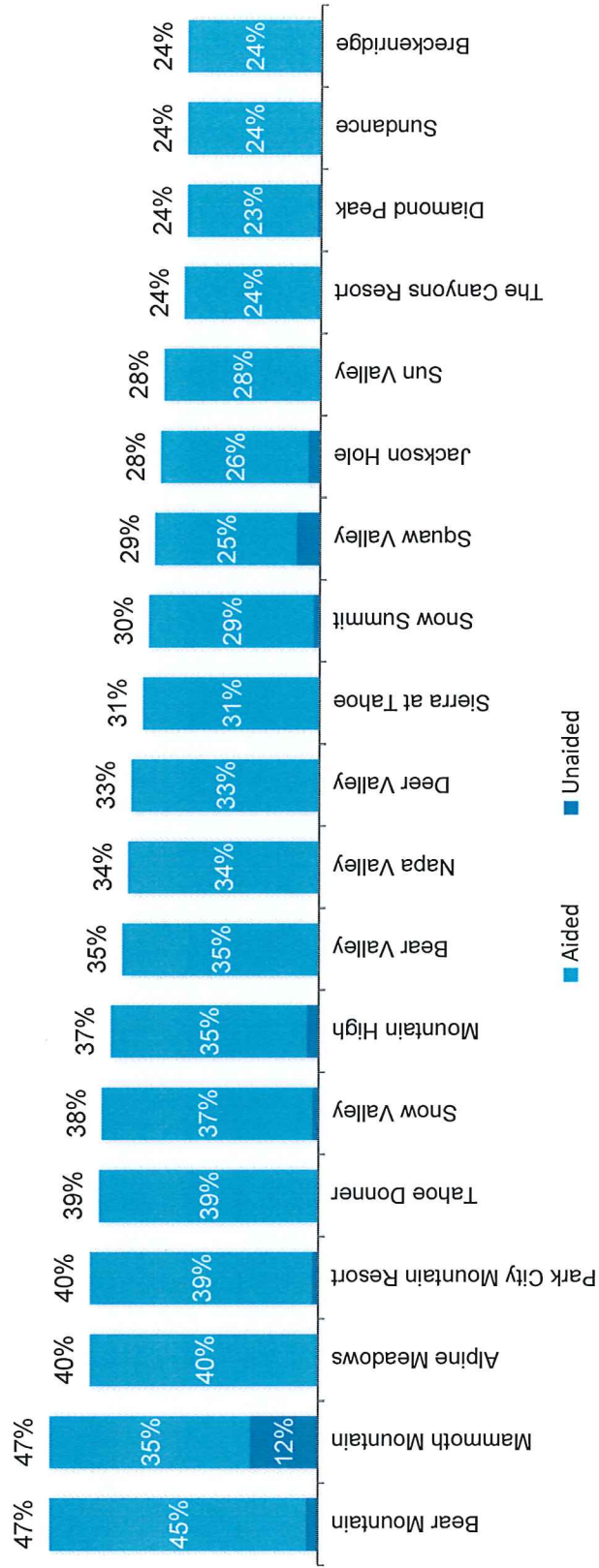
RESORT AWARENESS & VISITATION



Resort Awareness

Among Los Angeles target residents, Bear and Mammoth Mountain were the most recalled specific resort destinations

When you think of resort destinations for skiing, snowboarding, biking, paddle boarding, or kayaking, which resorts come to mind? Top Mentions
Base = Total

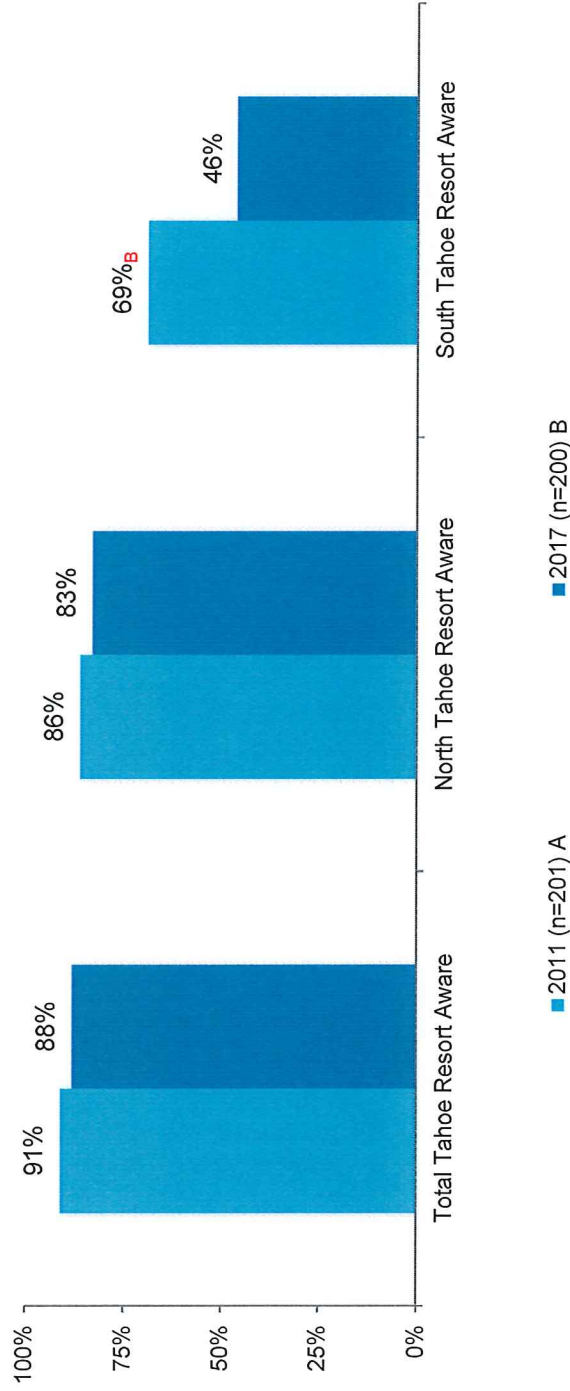


7-7

Lake Tahoe Resort Awareness

General Tahoe resort awareness, as well as those aware of a specific North Lake Tahoe resort, remained relatively similar between 2011 and 2017; South Tahoe awareness dropped significantly

When you think of resort destinations for skiing, snowboarding, biking, paddle boarding, or kayaking, which resorts come to mind?
Base = Total



A/B Significant at the 95% interval level.

Visitation Tendencies

The likelihood of visiting a ski or outdoor activity resort destination has increased demonstrably for almost all locations, including North Lake Tahoe

How likely are you to visit the following ski or outdoor activity resort destinations in the next 12 months? Top 2 Box "Likely/Very Likely to Visit" Summary

Base: Total

	Los Angeles			
	2008 Pre (n=200) A	2008 Post (n=202) B	2011 (n=201) C	2017 (n=200) D
Big Bear	75	73	71	78
South Lake Tahoe	73	69	66	89ABC
Mammoth Mountain	70	68	64	79ABC
North Lake Tahoe	64	67	60	86ABC
Colorado (any resort)	37	33	34	69ABC
Napa Valley (any resort)*	-	-	34AB	70ABC
Monterey (any resort)*	-	-	31AB	63ABC
Utah (any resort)	34	31	28	66ABC
Canada (any resort)*	0	0	25AB	61ABC
Oregon (any resort)	16	18	21	64ABC
Idaho (any resort)	14	15	17	56ABC
Wyoming (any resort)	15	16	14	60ABC
Another destination	30	30	37	50ABC
Santa Cruz	-	-	-	58
Palm Springs	-	-	-	71

Note: Santa Cruz and Palm Springs added in 2017

A/B Significant at the 95% interval level.

North Lake Tahoe Visitation Rationale

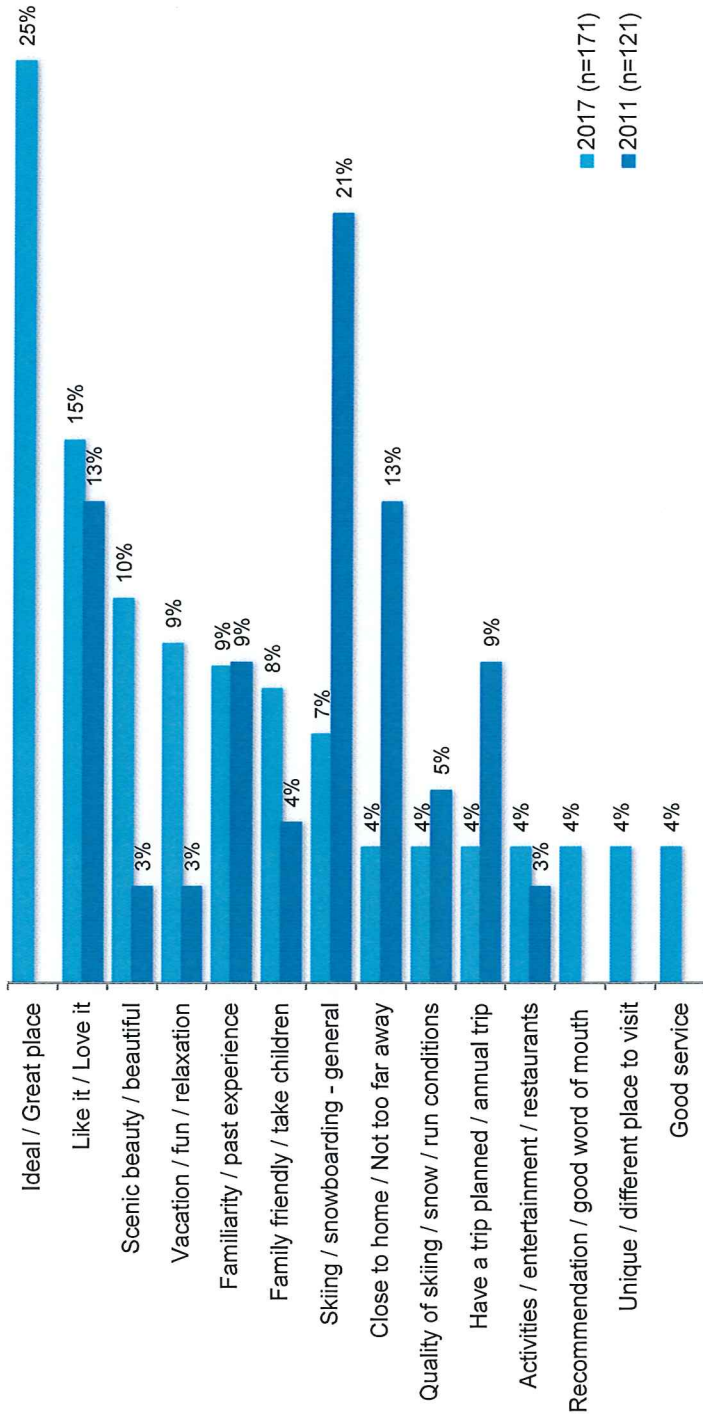
Finding North Lake Tahoe an ideal location that they love were the top reasons why Los Angeles residents were likely to visit North Lake Tahoe in the next 12 months

Among the 5% (n=9) unlikely to visit North Lake Tahoe, the top reasons were it being too far from home or they had already recently visited

Why are you likely to visit North Lake Tahoe in the next 12 months? Top mentions

Base = Likely to visit

All mentions <4% not charted

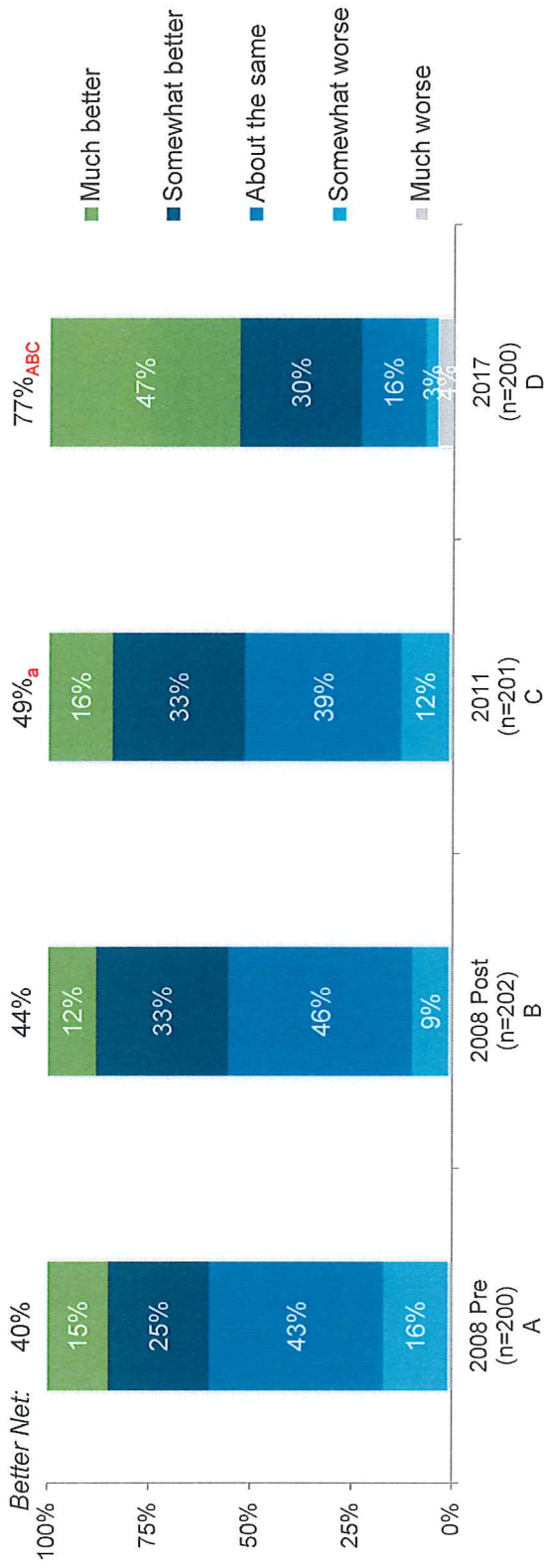


North Lake Tahoe Competitive Comparison

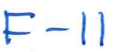
In 2017, North Lake Tahoe stands out significantly better than other competitive resort destinations than any prior year; most notably due to no longer being considered about the same

As a ski or outdoor activity resort destination, how do you think North Lake Tahoe compares to other competitive regional resort destinations (such as Mammoth Lakes, Whistler, Colorado, Utah, etc.?)

Base: Total



Note: Question reworded in 2011 to include outdoor activity. A/B Significant at the 95% interval level. a/b Significant at the 90% interval level.

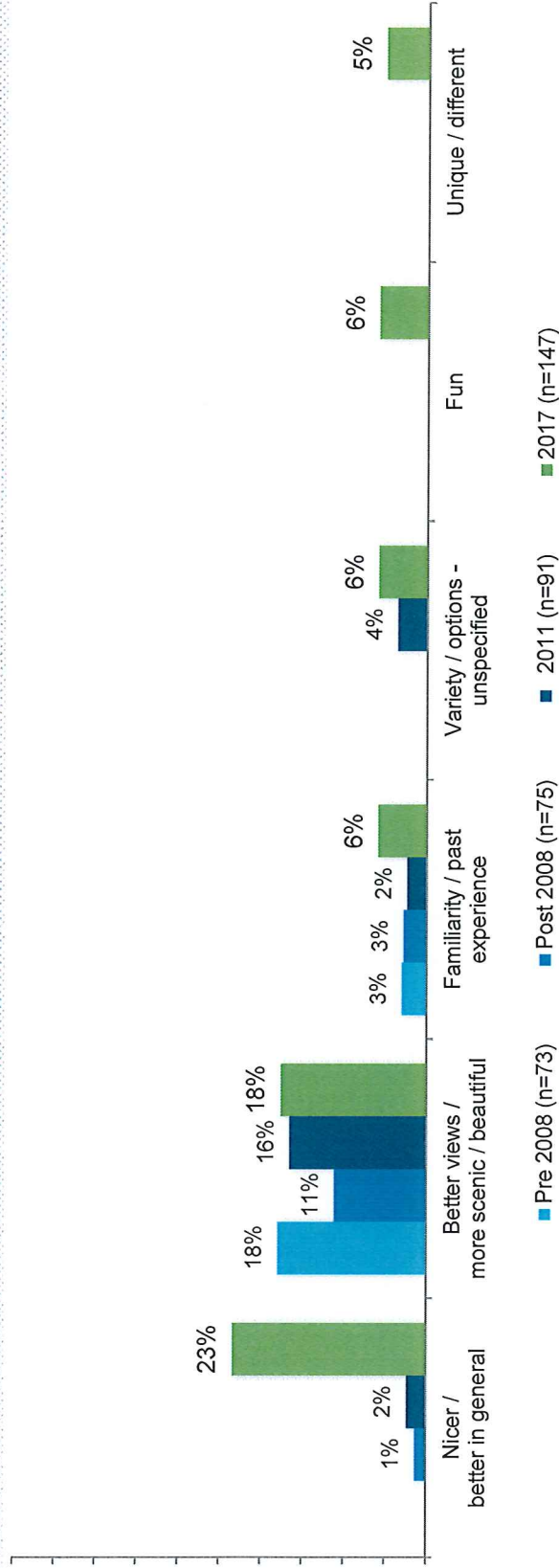


Competitive Assessment

In 2017, the location being generally better while having beautiful scenic views were the most common reason North Lake Tahoe is competitively better as a destination

In 2011 the quality of snow (20%) and having more ski activities (15%), areas and variety of slopes (14%) were the top three reasons

Why do you think it is better? Top mentions
 Base = Rated North Lake Tahoe better
 All mentions <5% not charted



Note: Statistical significance differences cannot be calculated due to n <30.

^ Caution small sample size

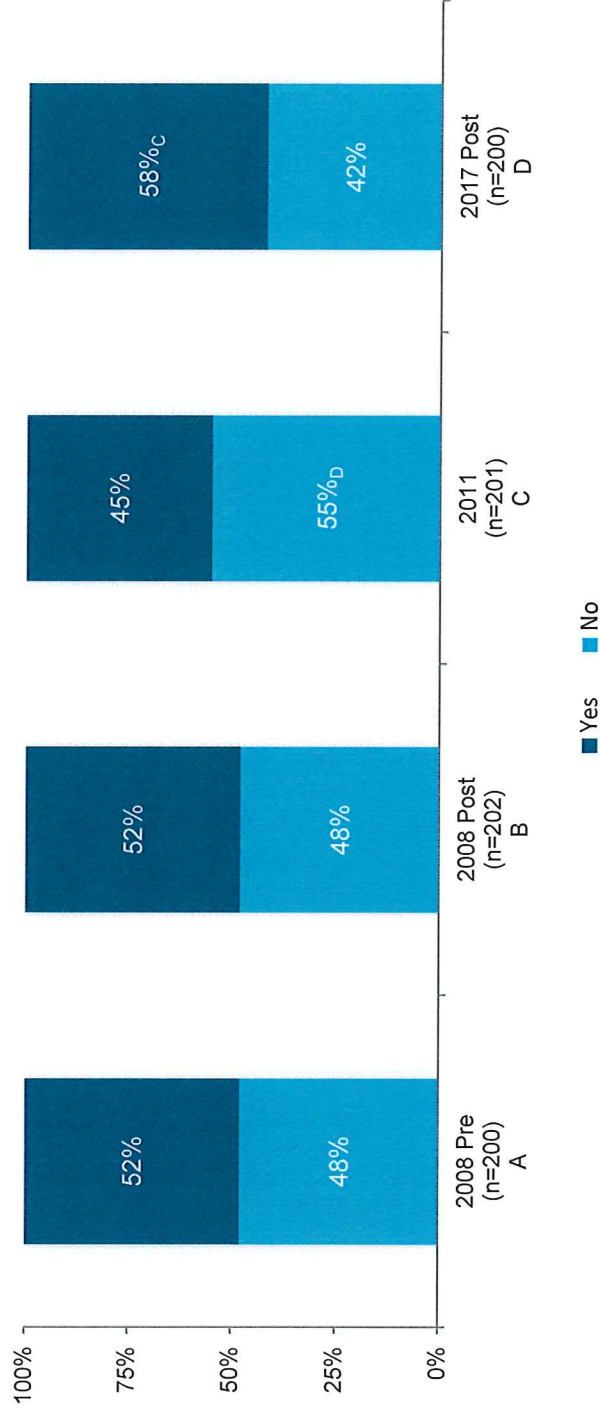
AD AWARENESS



Ad Awareness

Recall of all Lake Tahoe advertising increased significantly from 2011 to 2017

In the past several months, have you seen or heard any advertising for Lake Tahoe as a travel destination?
Base = Total

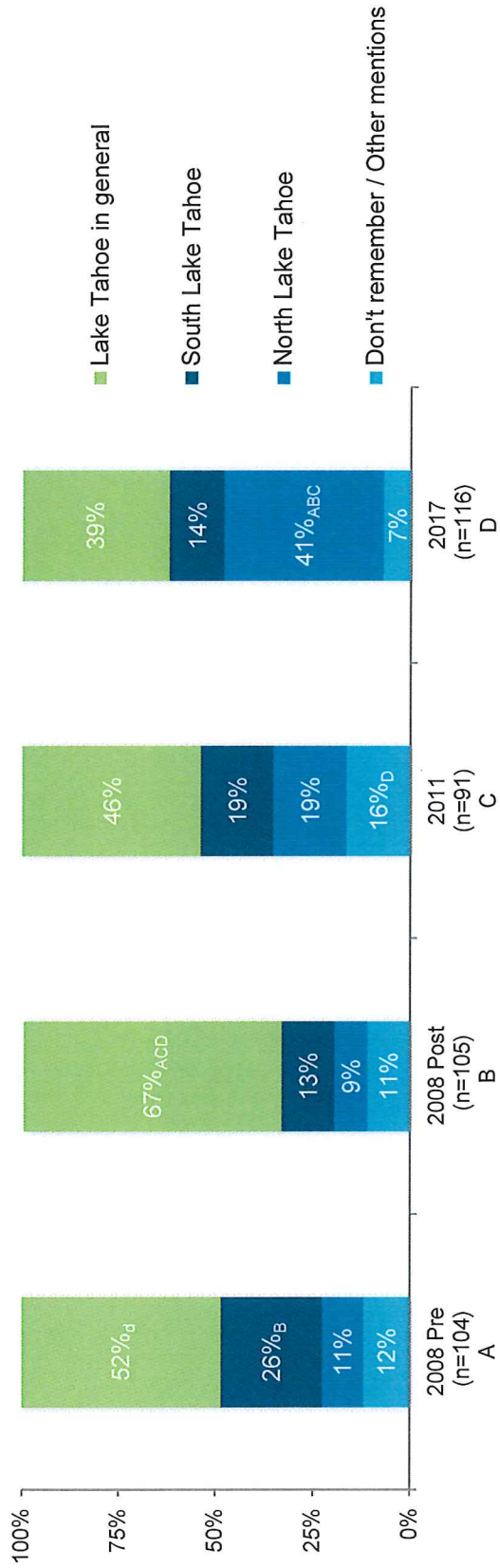


A/B Significant at the 95% interval level.

Ad Awareness of Specific Lake Tahoe Location

Advertising identified it as being particular to North Lake Tahoe doubled since 2011 and quadrupled since 2008

Was the advertising you saw or heard for...?
Base = Ad aware



A/B Significant at the 95% interval level. a/b Significant at the 90% interval level.

Ad Awareness Source

The most likely media through which residents were exposed to Lake Tahoe ads in 2017 was via the Internet, Television, and Facebook

Significant shifts have occurred over the past six years, with significantly fewer residents citing other traditional mediums of magazines, radio, newspapers, and direct mail

Where have you seen or heard these ads?

Base = Ad aware

	2008 Pre (n=104) A	2008 Post (n=105) B	2011 (n=90) C	2017 (n=90) C
Magazine / Travel planner	60CD	62CD	41	37
Internet	53	43	44	74ABC
Television	9	55AC	34A	55AC
Email	25	18	28b	22
Billboard	17	12	11	16
Radio	1	1	9AB	23ABC
Public place ad (i.e., pub, wall mural)	13	10	17	23aB
Newspaper	0	2	17AB	24AB
Direct mail	4	9	14A	16A
Facebook*	0	0	17AB	53ABC

* Facebook asked in 2011 survey only

A/B Significant at the 95% interval level. a/b Significant at the 90% interval level.

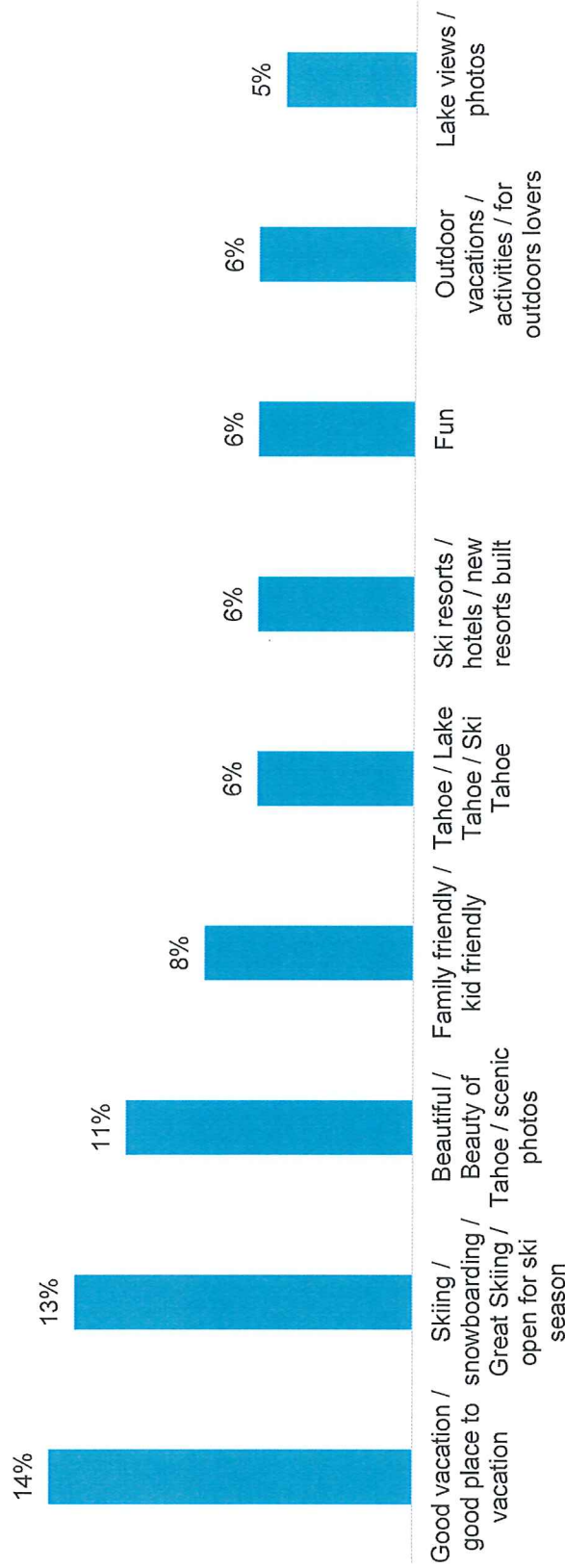
Unaided Message Recall

Tahoe being a good place to vacation with great skiing in a beautiful area were what those aware of any advertising recalled most

What do you recall from the ad(s) that you saw or heard? Top mentions

Base = Ad aware (n=116)

All mentions <4% not charted

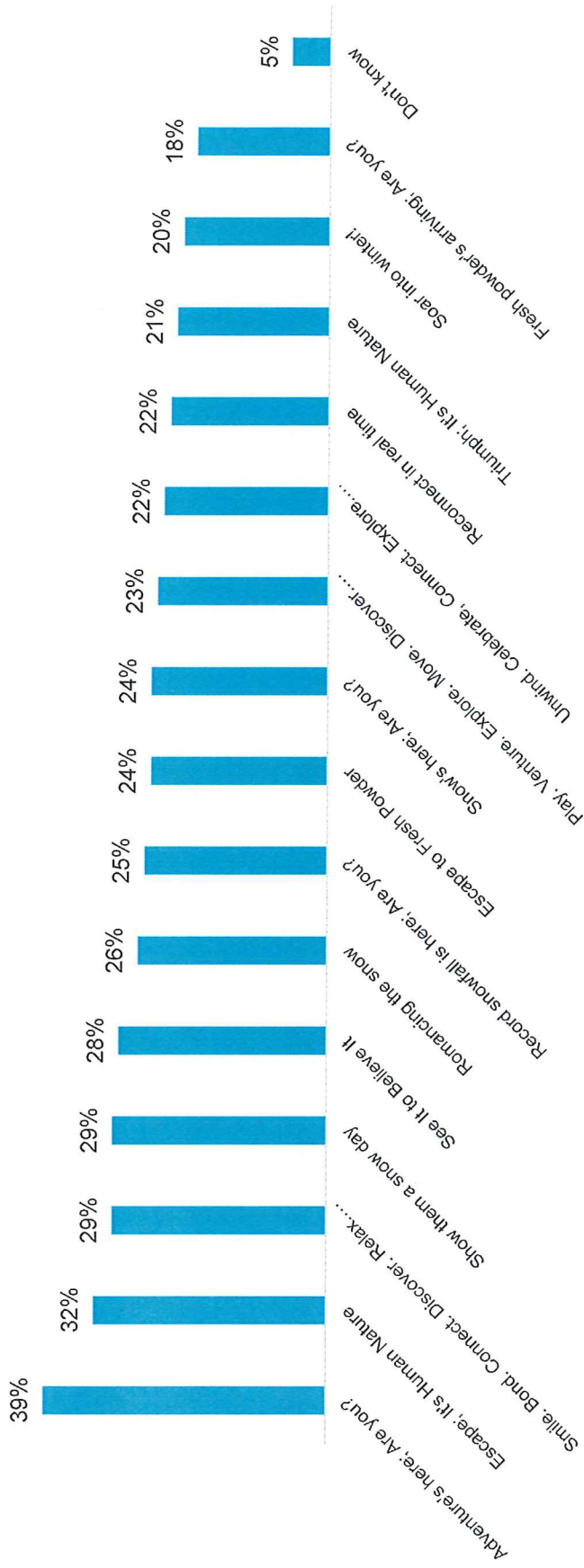


17-17

Unaided Message Recall

In terms of messaging, "Adventure's here; Are you?" was the top recalled message residents recall seeing or hearing

What messages, if any, do you recall from the ad(s) that you saw or heard? Top mentions
 Base = Ad aware (n=152)

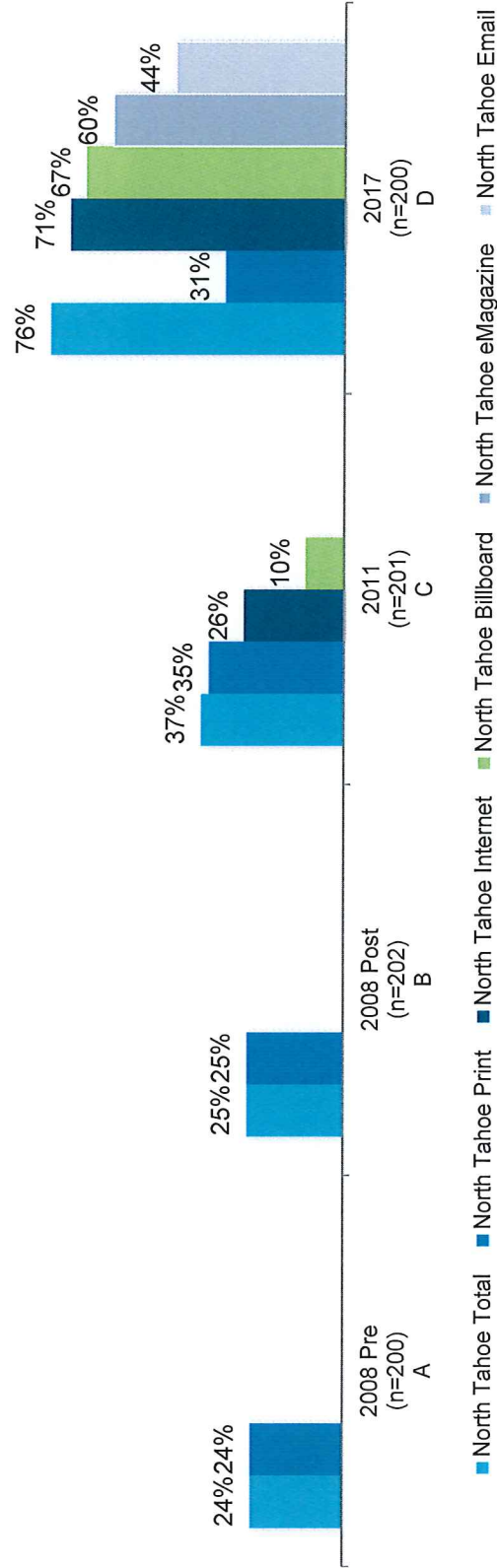


North Lake Tahoe Ad Awareness Over Time

Ad recall of the specific North Lake Tahoe ad campaign assets in Los Angeles increased significantly across all mediums accept print

Which, if any, of the following ads do you recall seeing?

Base: Netted back to Total



Note: NLT Internet and Billboard only measured in 2011. NLT eMagazine and Email only measured in 2017.

NORTH LAKE TAHOE AD IMPRESSIONS

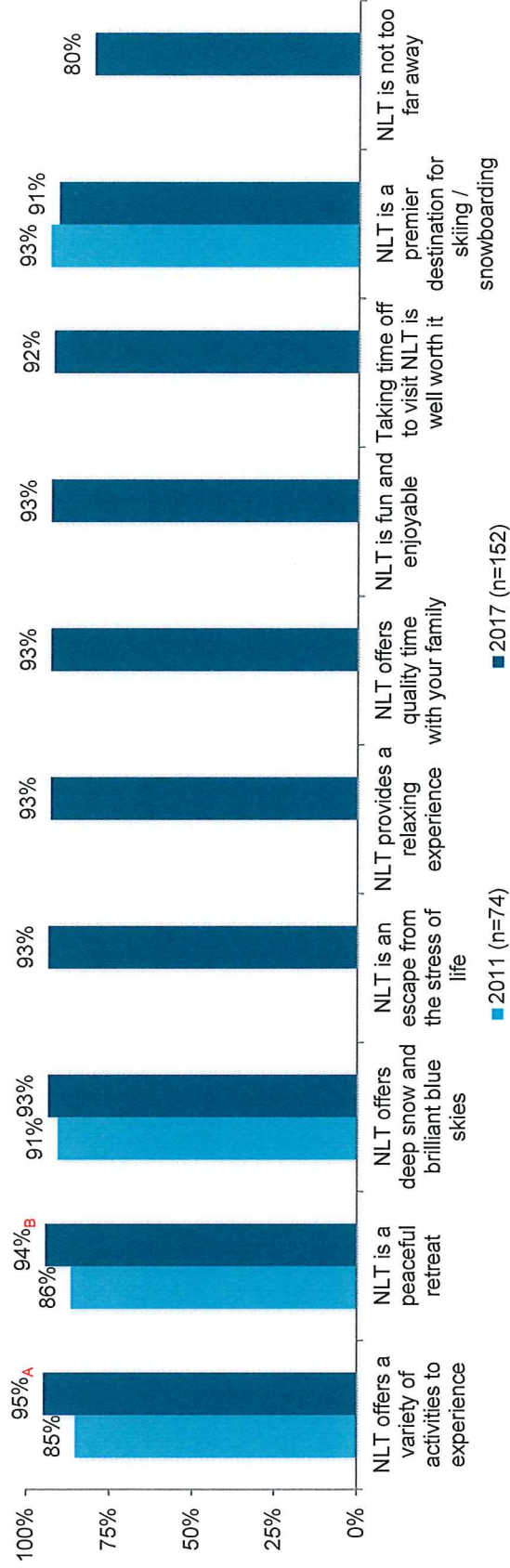


North Lake Tahoe Ad Impressions

The print, Internet, and email ads gave strong impressions that North Lake Tahoe offers a variety of activities and experiences and is a peaceful retreat; impressions resonating significantly more so than in 2011

How strongly did the ad(s) give you the impression that North Lake Tahoe...? Top 2 Box
 "Somewhat/Definitely Did" Summary

Base: Aware of North Lake Tahoe Print / Billboard/ Internet Ads



Note: certain messages were not tested in 2011 and therefore have no data to report for that year

A/B Significant at the 95% interval level.

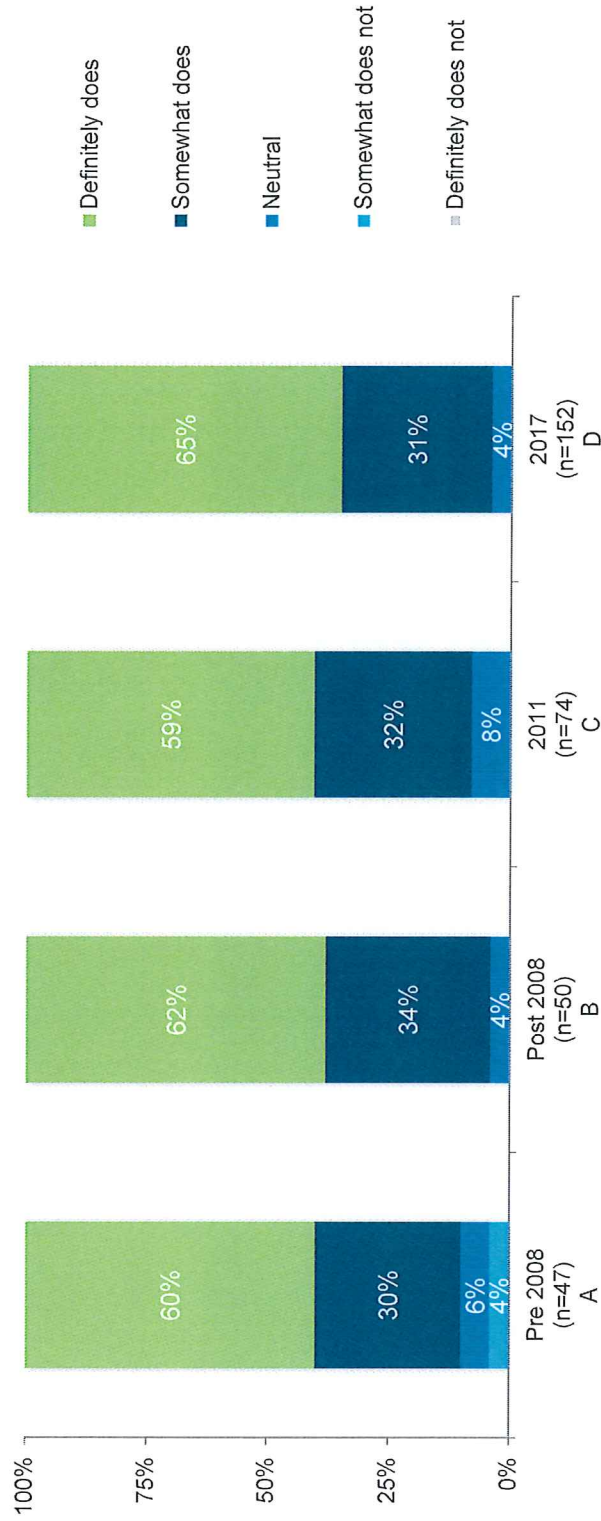
North Lake Tahoe Ad Campaign Image Conveyance

2 out of 3 Los Angeles residents believe that the ads for North Lake Tahoe definitely illustrate the essence of it being a captivating vacation destination

Though percentage increases were evident in 2017, there were no significant differences between years

Do you think the images in the ad(s) illustrate the essence of North Lake Tahoe as a captivating vacation destination?

Base: Aware of North Lake Tahoe Print / Billboard / Internet Ads

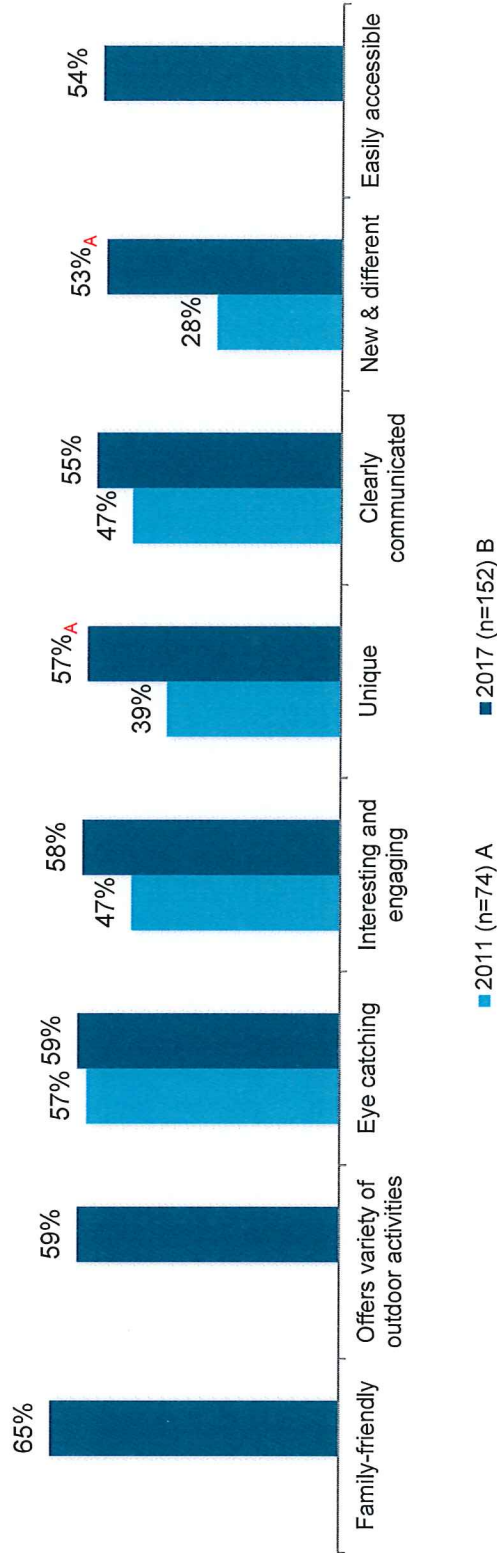


A/B Significant at the 95% interval level.

North Lake Tahoe Ad Characteristics

The ads were considered to strongly convey almost all characteristics equally as high in 2017, and significantly higher than 2011 for being unique and conveying North Lake Tahoe to be new and different

How much do you agree or disagree that the ad(s) is/are...? "Strongly Agree" Mentions Charted
 Base: Aware of North Lake Tahoe Print / Billboard/ Internet Ads



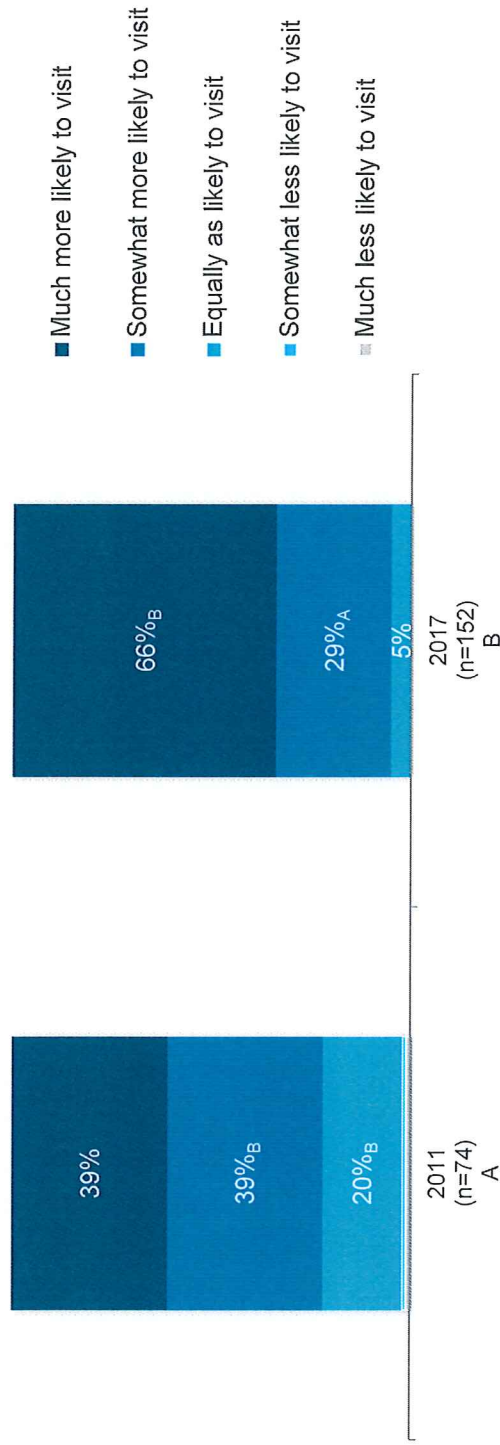
Note: certain attributes were not tested in 2011 and therefore have no data to report for that year

A/B Significant at the 95% interval level.

North Lake Tahoe Ad Campaign Impact on Visitation

The ads had a significantly higher impact on North Lake Tahoe visitation in 2017 given its being considered a premier destination for skiing and snowboarding

How did the ad(s) affect your likelihood to visit North Lake Tahoe as a premier destination for skiing / snowboarding?
 Base: Aware of North Lake Tahoe Print / Billboard/ Internet / Email Ads



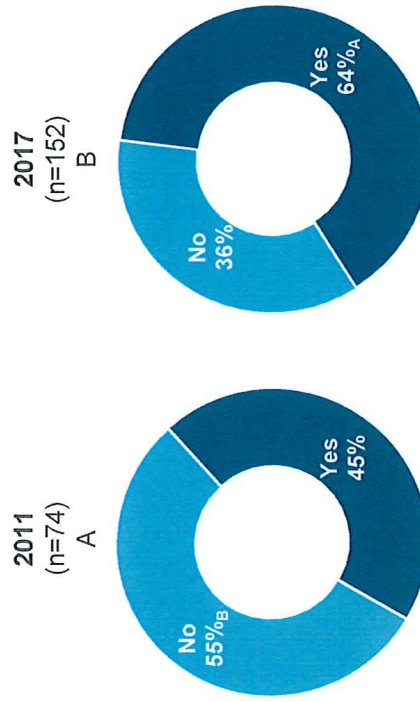
A/B Significant at the 95% interval level.

North Lake Tahoe Ad Campaign Impact on Website Visitation

The ads attracted significantly more residents to the North Lake Tahoe website, and the frequency of how often they visit increased substantially as well

Did you go to the website www.GoTahoeNorth.com as a result of seeing the ad(s)?
 Base: Aware of North Lake Tahoe Print / Billboard / Internet / Email Ads

How often do you visit the website www.GoTahoeNorth.com after seeing the ad(s)?
 Base: Went to website



	2011 (n=33 ^A)	2017 (n=97)
Frequently (at least 1 time a week or more)	27	41
Somewhat frequently (about 1-3 times a month)	30	47
Infrequently (1 time every other month or less)	36	8
Never again since the first time	6	3

^A Caution small sample size

A/B Significant at the 95% interval level.

NORTH LAKE TAHOE TV AD EVALUATION

TV not tested in 2011



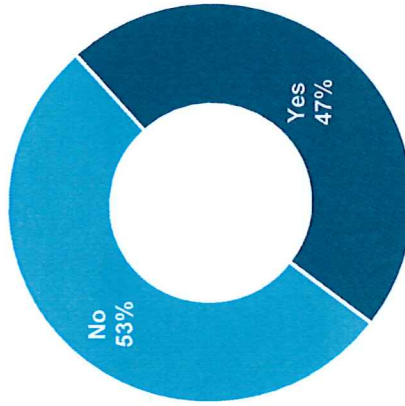
North Lake Tahoe TV Ad Campaign Impact on Website Visitation

1 in 2 Los Angeles residents recall the North Lake Tahoe television ad, with the vast majority going to the website as a result of seeing the ad

87% have visited the site frequently after having seen this television ad

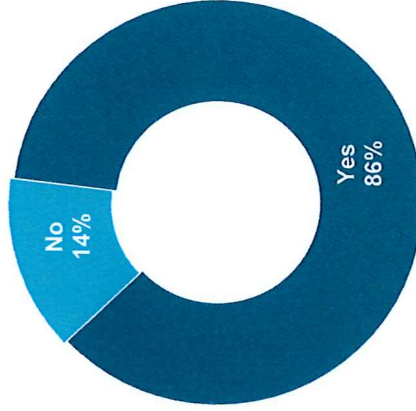
Do you remember seeing this television ad before?

Base: Total



Did you go to the website www.GoTahoeNorth.com as a result of seeing this commercial?

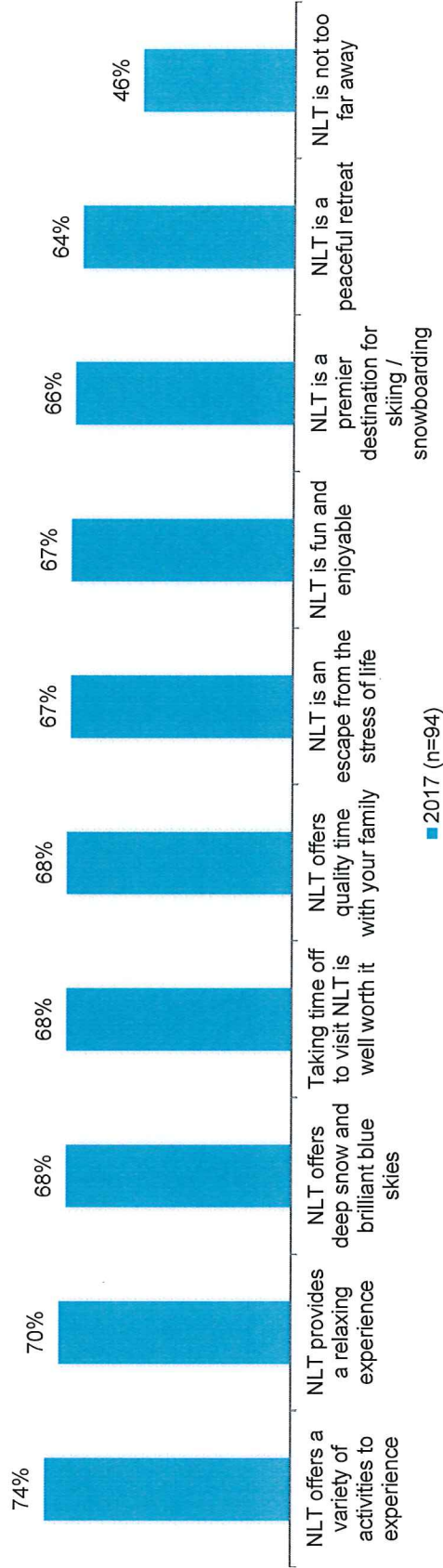
Base: Aware of TV Ad



North Lake Tahoe TV Ad Impressions

Similar to the other assets, TV gave the strongest impression that North Lake Tahoe offers a variety of activities and experiences and is a peaceful retreat

How strongly did the ad(s) give you the impression that North Lake Tahoe...? "Definitely Did" Mentions Charted
 Base: Aware of North Lake Tahoe TV Ad

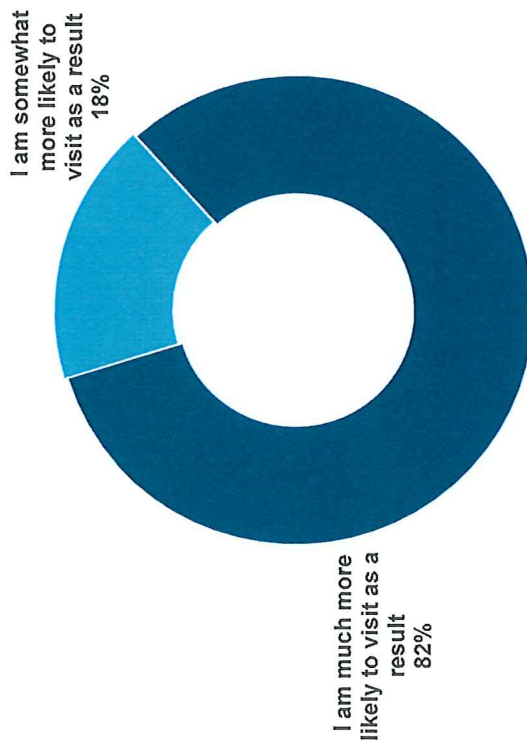


North Lake Tahoe TV Ad Campaign Impact on Visitation

The television ad had a strong impact on North Lake Tahoe visitation being considered a premier destination for skiing and snowboarding as well as illustrating the essence of it being a captivating destination

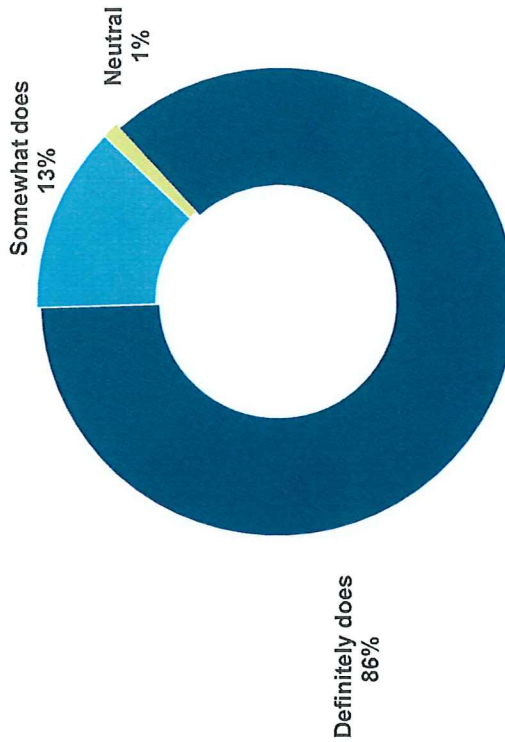
How does this television ad affect your likelihood to visit North Lake Tahoe as a premier destination for skiing / snowboarding?

Base: Aware of North Lake Tahoe TV Ad (n=94)



Do you think this television ad illustrates the essence of North Lake Tahoe as a captivating vacation destination?

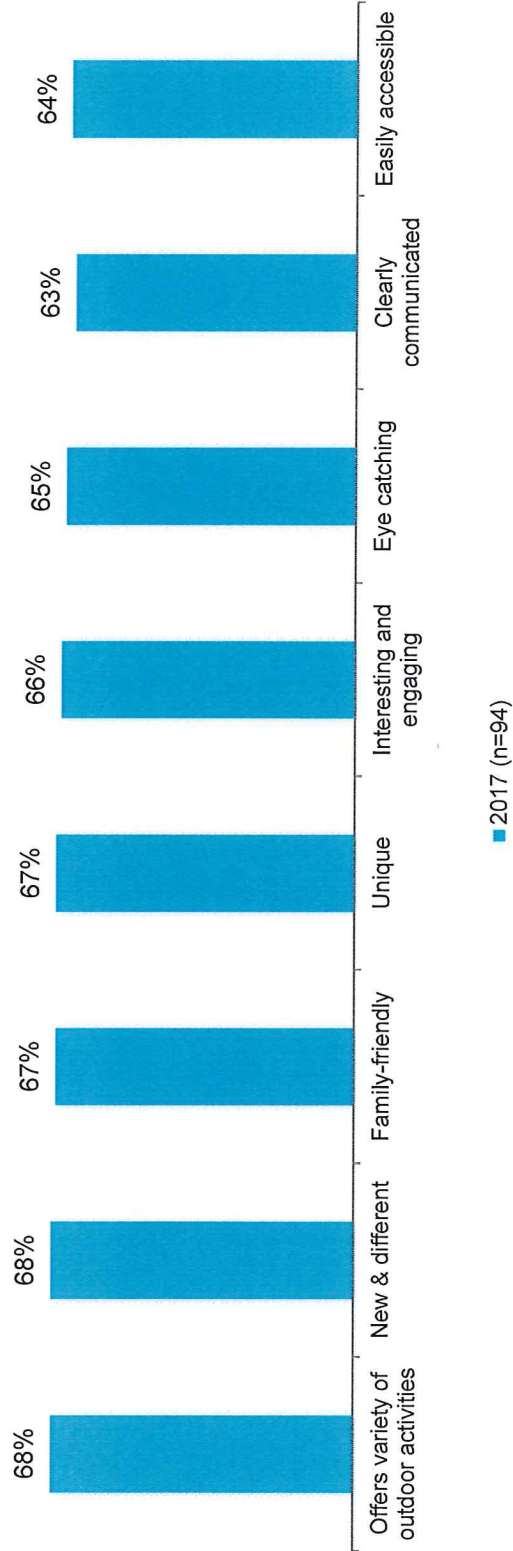
Base: Aware of North Lake Tahoe TV Ad (n=94)



North Lake Tahoe TV Ad Characteristics

The television ad strongly convey all characteristic metrics tested

How much do you agree or disagree that the ad(s) is/are...? "Strongly Agree" Mentions Charted
 Base: Aware of North Lake Tahoe TV Ad



Note: certain attributes were not tested in 2011 and therefore have no data to report for that year

TRAVEL BEHAVIOR



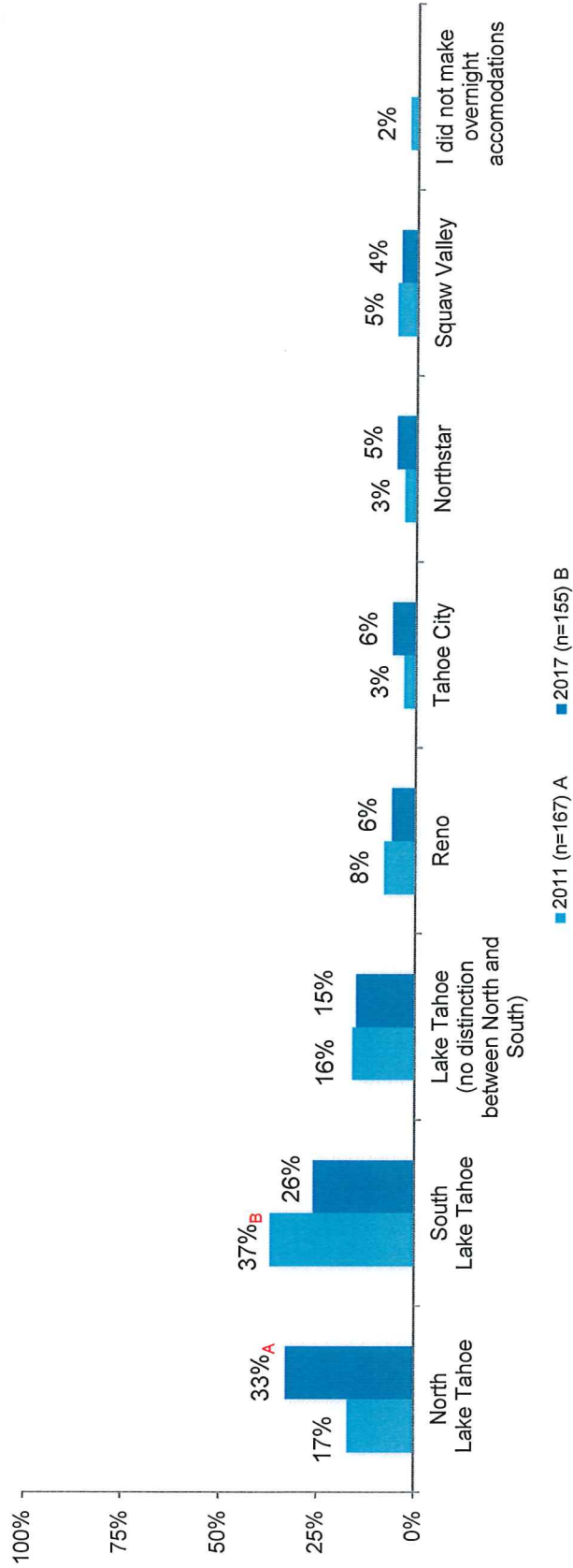
Lake Tahoe Overnight Accommodations

North Lake Tahoe was the most travelled destination among those who visited Lake Tahoe in the past 5 years, significantly higher than South Lake Tahoe which was most traveled in 2011

On your last trip to Lake Tahoe, where did you make overnight accommodations? Top Mentions

Base: Visited Lake Tahoe in past 5 years

Mentions <5% not charted

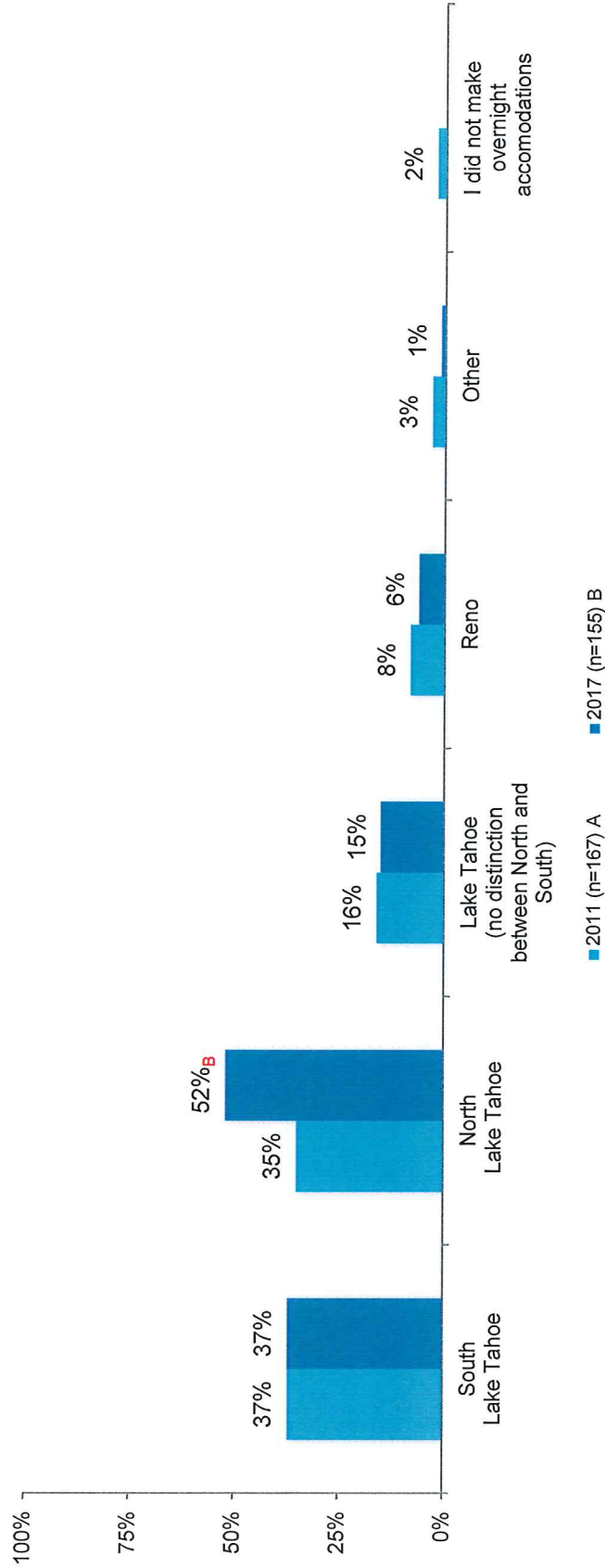


A/B Significant at the 95% interval level.

Lake Tahoe Overnight Accommodations Summary

When aggregated, North Lake Tahoe was travelled to significantly more so in 2017 than compared to 2011

On your last trip to Lake Tahoe, where did you make overnight accommodations?
 Base: Visited Lake Tahoe in past 5 years

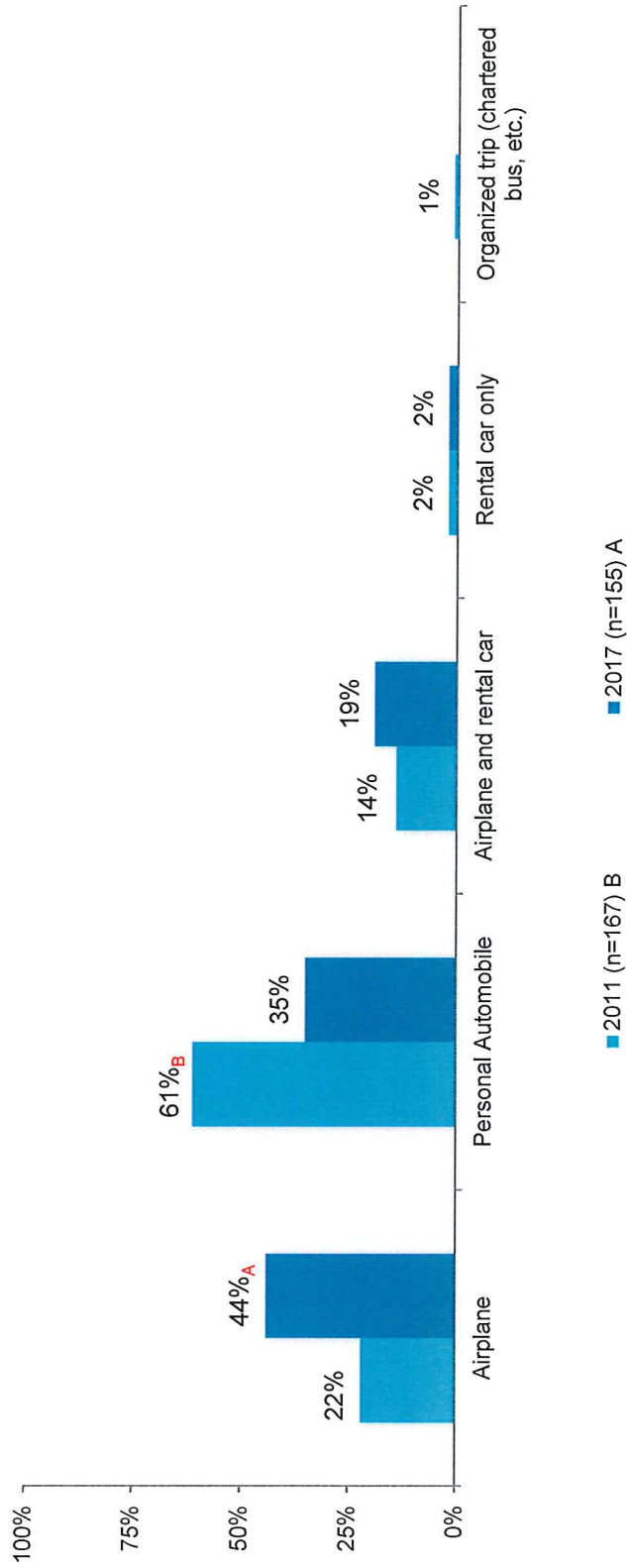


A/B Significant at the 95% interval level.

Lake Tahoe Transportation

Travelling by personal automobile was the most frequent mode of transportation in 2011; However, by 2017 traveling by plane became much more prevalent

What is your usual mode of transportation when traveling to Lake Tahoe?
 Base: Visited Lake Tahoe in past 5 years



A/B Significant at the 95% interval level.

Vacation Planning

When researching travel, the overwhelming majority of visitors continue to use travel websites, although internet and word-of-mouth is down in 2017 while the use of a travel agent and Facebook are up

Regardless, travel and resort/hotel websites were the typical methods of booking vacation accommodations among target residents

How do you typically research your vacation plans? Top Mentions
Base: Total

	Research	
	2011 (n=201) A	2017 (n=200) B
Travel websites	84	84
Internet - general	64B	47
Word of mouth	59B	39
Resort / Hotel websites	59	64
Destination city websites	41	44
Magazines / Newspapers	29	32
Yelp	17B	10
Travel brochures	17	22
Travel agent	14	34A
Facebook	10	30A
Destination city planners	4	7

How do you typically research your vacation plans? Top Mentions
Base: Total

	Book	
	2011 (n=201) A	2017 (n=200) B
Travel websites	48	49
Resort / Hotel websites	27	29
Call resort / hotel directly	11	12
Travel agent / wholesaler	7	6
Airline website	4	5

A/B Significant at the 95% interval level.

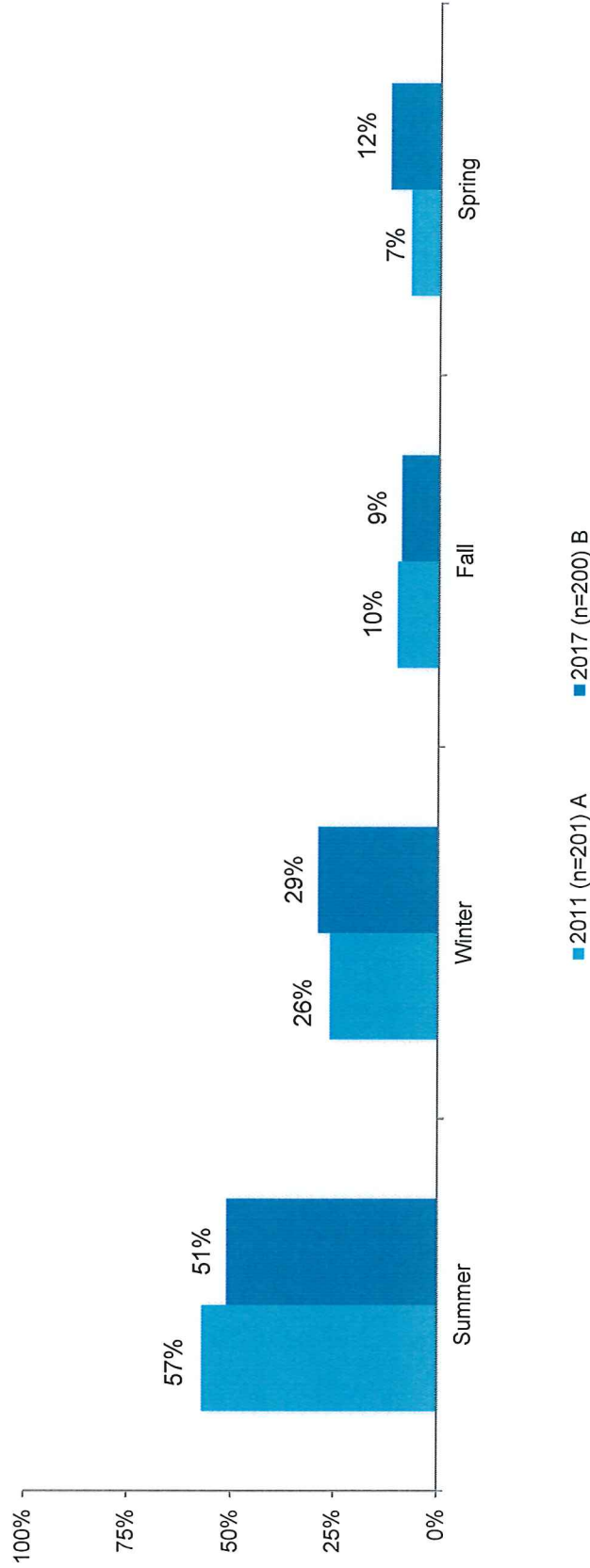
Vacation Schedule

Target residents travel most often during the summer, with little changes in travel behavior between 2011 and 2017

The average number of times traveled per year was 5 between 2008 to 2011, and dropped to 4 in 2017

During what season do you most often travel for vacation?

Base: Total

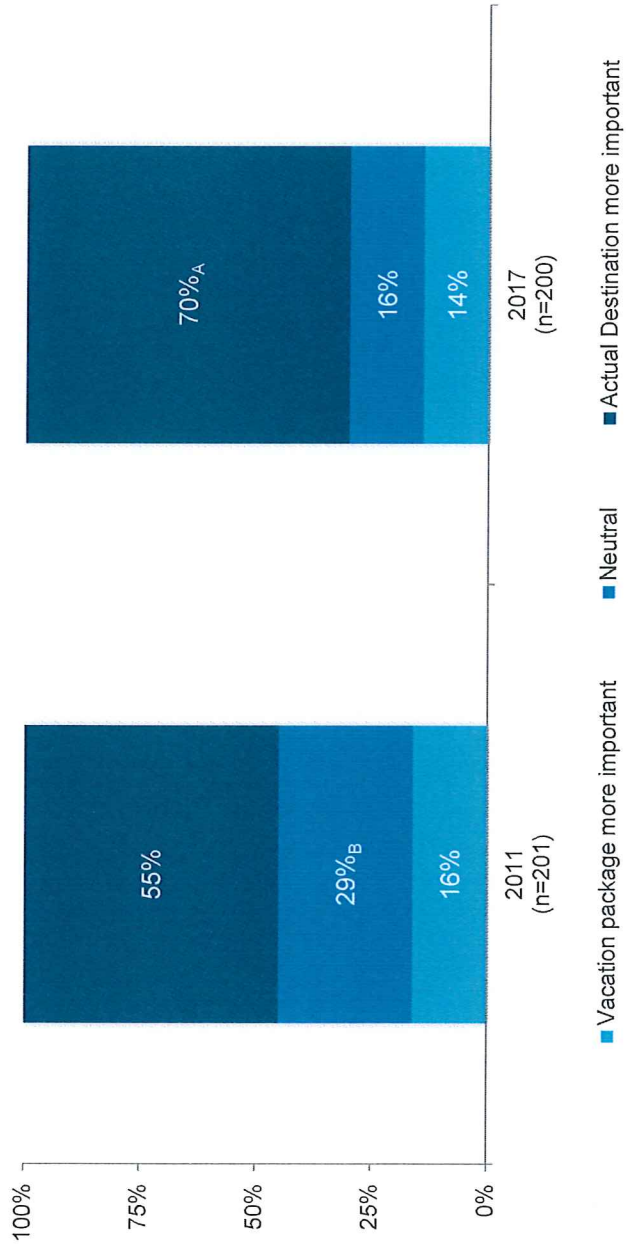


A/B Significant at the 95% interval level.

Importance of Vacation Package

Compared to 2011, in 2017 the actual destination was much more important than the vacation package

Please rate how important a vacation package is when deciding to select a vacation destination.
Base: Total

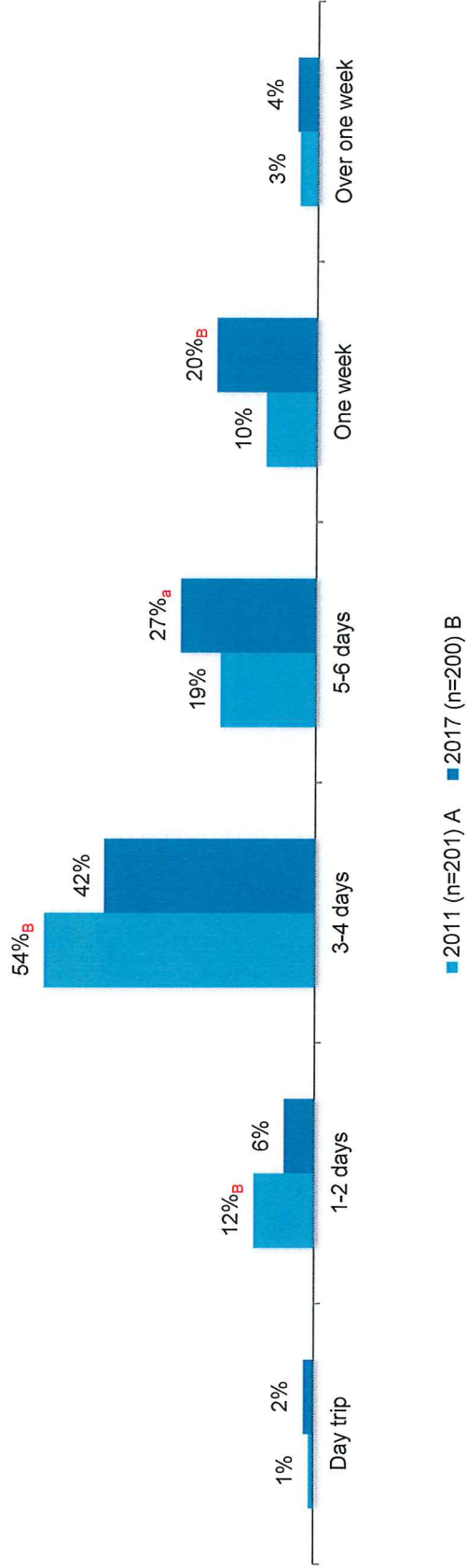


A/B Significant at the 95% interval level.

Ski or Outdoor Activity Resort Durations

In 2017, Los Angeles residents are trending toward taking longer vacations compared to 2011
On average, in 2011 and 2017, 3 separate trips are taken to a mountain resort destination in a typical winter/spring season

When visiting a ski or outdoor activity resort, what is the typical duration of your trip?
 Base: Total



A/B Significant at the 95% interval level.

APPENDIX



Respondent Profile

Base	Pre-2008		Post-2008		2011		2017	
	200		202		201		200	
Age								
25 - 34	39%		43%		31%		56%	
35 - 44	37%		33%		42%		36%	
45 - 54	25%		24%		27%		9%	
Gender								
Male	52%		50%		46%		58%	
Female	49%		50%		54%		42%	
HH Income								
\$75K - \$99K	18%		26%		9%		34%	
\$100K - \$124K	29%		27%		28%		20%	
\$125K - \$149K	19%		14%		20%		27%	
\$150K - \$199K	18%		17%		26%		9%	
\$200K or more	17%		15%		17%		12%	
Education								
High school or less	1%		2%		2%		1%	
Some college	7%		14%		7%		4%	
College degree	47%		42%		49%		40%	
Post graduate (Masters)	30%		28%		26%		24%	
Post graduate (Doctorate)	16%		15%		18%		32%	

Note: Percentages may not add up to 100% due to rounding

a/b Significant at the 90% interval level.

North Lake Tahoe Marketing Cooperative Profit & Loss Budget vs. Actual

July 1, 2016 through April 20, 2017

	Jul 1, '16 - Apr 20, 17	Budget	\$ Over Budget	% of Budget
Income				
4000-00 · LTIVCBVB Funding				
4000-01 · LTIVCBVB Funding Add-On	149,500.00	137,166.67	12,333.33	109.0%
4000-00 · LTIVCBVB Funding - Other	614,000.00	596,833.33	17,166.67	102.9%
Total 4000-00 · LTIVCBVB Funding	763,500.00	734,000.00	29,500.00	104.0%
4001-00 · NLTRA Funding				
4001-01 · NLTRA Funding Add-On	12,371.00	12,371.00	0.00	100.0%
4001-00 · NLTRA Funding - Other	1,075,250.00	1,054,166.67	21,083.33	102.0%
Total 4001-00 · NLTRA Funding	1,087,621.00	1,066,537.67	21,083.33	102.0%
4004-00 · IVCBVB Entertainment	7,000.00	7,000.00	0.00	100.0%
4005-00 · Prior Year Net Income	0.00	61,314.00	-61,314.00	0.0%
Total Income	1,858,121.00	1,868,851.67	-10,730.67	99.4%
Gross Profit	1,858,121.00	1,868,851.67	-10,730.67	99.4%
Expense				
5000-00 · CONSUMER MARKETING				
5001-00 · Broadcast / Radio	10,000.00	12,000.00	-2,000.00	83.3%
5002-00 · Leisure Print	0.00	45,000.00	-45,000.00	0.0%
5002-01 · Native Display	0.00	37,500.00	-37,500.00	0.0%
5004-00 · Online Interactive / Digital	435.00	52,593.33	-52,158.33	0.8%
5005-00 · Social / Mobile / SEM	832.50	75,000.00	-74,167.50	1.1%
5005-01 · Digital	299,165.47	204,510.67	94,654.80	146.3%
5007-00 · Creative Production/Client Svcs	101,411.67	148,304.67	-46,893.00	68.4%
5010-00 · Agency Retainer	69,290.00	67,666.67	1,623.33	102.4%
5010-01 · Digital Media Management	7,633.75	23,000.00	-15,366.25	33.2%
5018-00 · Media Commission/Ad Serving	53,209.45	61,816.33	-8,606.88	86.1%
5018-01 · Didital Ad Serving	43,549.39	8,000.00	35,549.39	544.4%
5018-02 · Primary Research	0.00	15,765.00	-15,765.00	0.0%
5018-03 · Strategic Marketing Plan	0.00	17,500.00	-17,500.00	0.0%
5018-04 · Website Recovery	0.00	5,500.00	-5,500.00	0.0%
5022-00 · Email	0.00	22,708.33	-22,708.33	0.0%
5023-00 · Additional Opportunities	119,096.22	140,000.00	-20,903.78	85.1%
Total 5000-00 · CONSUMER MARKETING	704,623.45	936,865.00	-232,241.55	75.2%
5110-00 · LEISURE SALES				
5111-00 · FAMS - Domestic	1,586.94	2,500.00	-913.06	63.5%
5112-00 · Training / Sales Calls	1,925.32	2,166.67	-241.35	88.9%
5113-00 · Additional Opportunities	311.38	2,333.33	-2,021.95	13.3%
5114-00 · Agent Online Trainings	163.21	1,666.67	-1,503.46	9.8%
5115-00 · Travel Agent Incentive Program	874.00	1,633.33	-759.33	53.5%
5116-00 · RSA (Receptive Serv Assn) Membe	695.00	2,000.00	-1,305.00	34.8%
5120-00 · Domestic - Trade Shows	2,949.23	4,500.00	-1,550.77	65.5%
5121-00 · Client Events	0.00	2,000.00	-2,000.00	0.0%
5131-00 · FAMS -Intl - Travel Trade	2,362.84	5,500.00	-3,137.16	43.0%
5134-00 · Intl Marketing - Additional Opp	278.34	5,000.00	-4,721.66	5.6%
5135-00 · North American Journeys/Tour Op	0.00	3,000.00	-3,000.00	0.0%
5136-00 · Tour Operator Brochure Support	1,135.00	6,000.00	-4,865.00	18.9%
5137-00 · Co-op Opportunities	6,692.54	10,000.00	-3,307.46	66.9%
5141-00 · Australian Sales Mission	5,963.69	5,900.00	63.69	101.1%
5142-00 · UK Sales Mission	5,691.87	10,000.00	-4,308.13	56.9%
5143-00 · Mountain Travel Symposium	4,257.64	4,000.00	257.64	106.4%
5144-00 · IPW - POW WOW	9,129.59	6,500.00	2,629.59	140.5%
5145-00 · TIA Annual Dues	2,500.00	2,400.00	100.00	104.2%
5146-00 · UK / Black Diamond	25,000.00	22,916.67	2,083.33	109.1%
5147-00 · AUS / Gate 7	16,125.00	18,791.67	-2,666.67	85.8%
5149-00 · Mexico Program	16,033.18	9,250.00	6,783.18	173.3%
5150-00 · China Program	3,500.00	11,666.67	-8,166.67	30.0%
5151-00 · RTO West	3,381.14	2,695.00	686.14	125.5%
5152-00 · Go West	978.57	3,500.00	-2,521.43	28.0%
5152-01 · Transulation Services	0.00	5,000.00	-5,000.00	0.0%
Total 5110-00 · LEISURE SALES	111,534.48	150,920.01	-39,385.53	73.9%
5200-00 · PUBLIC RELATIONS				
5201-00 · Agency Fees	59,583.00	62,833.33	-3,250.33	94.8%
5202-00 · PR Program/ Content Development	23,214.94	44,305.33	-21,090.39	52.4%
5204-00 · Media Mission(s)	2,416.31	5,000.00	-2,583.69	48.3%
5205-00 · Conference Outreach	9,000.00	9,666.67	-666.67	93.1%
5206 · Digital Buy/Social Media Boost	13,500.00	14,500.00	-1,000.00	93.1%
5207 · Content Campaigns / Tools	20,607.63	13,886.67	6,720.96	148.4%
5208 · International Travel Media FAMS	20,204.59	9,666.67	10,537.92	209.0%
5209 · Domestic Travel Media FAMS	2,673.44	3,625.00	-951.56	73.8%
Total 5200-00 · PUBLIC RELATIONS	151,199.91	163,483.67	-12,283.76	92.5%
6000-00 · CONFERENCE SALES				
6002-00 · Destination Print	18,153.50	20,637.67	-2,484.17	88.0%

North Lake Tahoe Marketing Cooperative Profit & Loss Budget vs. Actual

July 1, 2016 through April 20, 2017

	Jul 1, '16 - Apr 20, 17	Budget	\$ Over Budget	% of Budget
6003-00 · Conference Online / Interactive	0.00	6,000.00	-6,000.00	0.0%
6004-00 · Email/SEM	0.00	7,666.67	-7,666.67	0.0%
6006-00 · Production / Client Services	10,135.00	0.00	10,135.00	100.0%
6128-00 · HelmsBriscoe Strategic Partner	0.00	5,000.00	-5,000.00	0.0%
6128-01 · MCC Digital	20,262.00	27,286.67	-7,024.67	74.3%
6128-02 · MCC Media Commission	4,710.29	7,161.00	-2,450.71	65.8%
6128-03 · MCC Digital Ad Serving	0.00	100.00	-100.00	0.0%
6145-00 · Sponsorship - World Senior Golf	9,300.20	2,350.00	6,950.20	395.8%
6152-00 · Client Events / Opportunities	2,056.43	40,000.00	-37,943.57	5.1%
6153-00 · Chicago Sales Rep Support	4,449.01	7,500.00	-3,050.99	59.3%
Total 6000-00 · CONFERENCE SALES	69,066.43	123,702.01	-54,635.58	55.8%
6100-00 · TRADE SHOWS				
6111-00 · Site Inspections	2,490.14	4,833.33	-2,343.19	51.5%
6115-00 · Chicago Holiday Showcase	4,676.06	6,200.00	-1,523.94	75.4%
6116-00 · CalSAE Seasonal Spectacular	2,073.68	1,525.00	548.68	136.0%
6117-00 · Duda Golf Sponsorship	-6,585.00	0.00	-6,585.00	100.0%
6118-00 · ASAE Annual	5,602.11	3,950.00	1,652.11	141.8%
6121-00 · M&C Interactive	0.00	2,500.00	-2,500.00	0.0%
6124-00 · IMEX	11,332.85	12,000.00	-667.15	94.4%
6127-00 · CalSAE Annual	4,948.40	6,300.00	-1,351.60	78.5%
6136-00 · Mountain Travel Symposium	2,445.00	4,500.00	-2,055.00	54.3%
6142-00 · Luxury Meeting Summit NorCal	8,737.94	1,500.00	7,237.94	582.5%
6143-00 · Connect Marketplace	10,356.96	11,900.00	-1,543.04	87.0%
6144-00 · ASAE XDP	0.00	2,500.00	-2,500.00	0.0%
6146-00 · UC Vendor Fair	300.00	555.00	-255.00	54.1%
6147-00 · Luxury Summit Texas	2,394.54	6,100.00	-3,705.46	39.3%
6148-00 · Luxury Summit SoCal	1,539.95	5,200.00	-3,660.05	29.6%
6149-00 · MEET National	7,133.83	7,250.00	-116.17	98.4%
6150-00 · Luxury Meeting Summit MA/CT/NY	0.00	6,100.00	-6,100.00	0.0%
6154-00 · HelmsBriscoe ABC	0.00	2,000.00	-2,000.00	0.0%
6155-00 · Luxury Meeting Summit NW	1,892.92	3,300.00	-1,407.08	57.4%
6156-00 · Connect California	4,420.95	3,940.00	480.95	112.2%
6157-00 · HPN Partner Conference	2,592.84	0.00	2,592.84	100.0%
Total 6100-00 · TRADE SHOWS	66,353.17	92,153.33	-25,800.16	72.0%
7000-00 · COMMITTED & ADMIN EXPENSES				
5008-00 · Cooperative Programs	25,405.60	33,000.00	-7,594.40	77.0%
5009-00 · Fulfillment / Mail	7,877.94	8,055.33	-177.39	97.8%
5021-00 · RASC-Reno Air Service Corp	75,000.00	75,000.00	0.00	100.0%
5122-00 · SSMC Shipping - Sierra Ski Mkt	90,000.00	67,500.00	22,500.00	133.3%
5123-00 · HSVC - High Sierra Visitors	5,765.03	2,250.00	3,515.03	256.2%
7001-00 · Miscellaneous	233.05	2,750.00	-2,516.95	8.5%
7002-00 · CRM Subscription	10,000.00	9,000.00	1,000.00	111.1%
7003-00 · IVCBVB Entertainment Fund	5,537.25	7,000.00	-1,462.75	79.1%
7004-00 · Research	0.00	10,000.00	-10,000.00	0.0%
7005-00 · Film Festival	16,231.60	15,000.00	1,231.60	108.2%
7006-00 · Special Events	98.04	5,000.00	-4,901.96	2.0%
7007-00 · Destimetrics / DMX	31,204.00	23,403.00	7,801.00	133.3%
8700-00 · Automobile Expense*	3,044.26	0.00	3,044.26	100.0%
Total 7000-00 · COMMITTED & ADMIN EXPENSES	270,396.77	257,958.33	12,438.44	104.8%
8000-00 · WEBSITE CONTENT & MAINTENANCE				
8002-00 · Content Manager Contractor	35,833.30	36,250.00	-416.70	98.9%
8003-00 · Website Hosting Maintenance	11,084.50	15,000.00	-3,915.50	73.9%
Total 8000-00 · WEBSITE CONTENT & MAINTENAN...	46,917.80	51,250.00	-4,332.20	91.5%
Total Expense	1,420,092.01	1,776,332.35	-356,240.34	79.9%
Net Income	438,028.99	92,519.32	345,509.67	473.4%