



north lake tahoe

NORTH LAKE TAHOE MARKETING COOPERATIVE MEETING

Agenda

Wednesday, August 22 - 2018

Call in information:

Call in number: 605-475-4842

Access code: 120318

The June meeting of the North Lake Tahoe Marketing Coop Committee will be held on Wednesday August 22 at 9am. The meeting will be held in the **Incline Village Crystal Bay Visitors Bureau**, located at 969 Tahoe Blvd. Incline Village.

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 13, 2018 and June 6, 2018 Coop Meeting Minutes
(For Possible Action) Page 1 | Chair |
| F. Consumer/PR Update | Augustine/Abbi |
| G. Peter Greenberg “Hidden Gems” Program for Approval | Daphne Lange |

- | | |
|--|------------------------------|
| H. Leisure Sales Update Page 15 | Sarah Winters |
| I. Conference Sales Update Page 24 | Jason Neary |
| J. DCI Canada Presentation | Amalia Meliti/Collette Baert |
| K. 17/18 Year End Budget Review | Andy C./Daphne L. |
| L. New Business | Chair |
| M. Old Business | Chair |
| N. Adjournment | 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 – Tuesday, March 13, 2018

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

1.0 CALL TO ORDER

The meeting was called to order at 2:10 pm and a quorum was established.

2.0 PUBLIC COMMENTS

No public forum.

3.0 ROLL CALL

Committee member: Brett Williams, Christine Horvath, Bill Wood, Cindy Gustafson (called-in), Daphne Lange, Andy Chapman

Other in attendance: Allegra Demerjian, Alexis Kahn and Lindsay Moore (called-in), Anna Atwood

4.0 APPROVAL OF AGENDA

- **M/S/C (Williams/Wood) (5/0) to approve the agenda as presented.**

5.0 APPROVAL OF SEPTEMBER 27, 2017 MEETING MINUTES

- **M/S/C (Chapman/Williams) (5/0) to approve the September 27, 2017 Marketing Cooperative Minutes.**

6.0 BACC HIGH NOTES SUMMER CAMPAIGN REVIEW – DAPHNE LANGE

Daphne shared that there is a need to review the name and messaging for High Notes. This was brought up last year in the Marketing Committee but it was too late to implement any changes. There needs to be a continued focus on the regional music offerings year-round. The BACC had suggested calling it "Music in the Mountains."

Comments:

- Music in the Mountains: half of the events take place at the lake. Maybe call it "North Lake Tahoe Music" with a tag line: from the mountains to the lake.
- Another committee member suggested calling it: North Lake Tahoe High Notes. We have already built equity in High Notes.
- Andy shared it is High Notes that doesn't resonate with some of the committee members. He stated there is already a Music in the Mountains in Nevada City. He recommended having the agencies doing a little more research on that name. He highly recommended having North Lake Tahoe be part of the name.
- Some of the obstacles with the High Notes, was that the individual areas would promote their own event and not necessarily incorporate the "High Notes" logo and message. The messaging of High Notes should be wrapped in with their own promotions.
- The different venues lacks consistency with the campaign.
- Andy did state there were rack cards last year, along with a page of High Notes music built on the GoTahoeNorth website.
- One member suggested maybe having a devoted committee to help with this and you have the different venues buy-in.

- Help build a package of collateral and a tool kit for the different venues/event producers such as TCDA and NTBA, Squaw and Northstar.
- It was recommended that the agency look at the music platform and that this conversation be brought back to the BACC Committee for discussion.
- Maybe this is a buy-in from Truckee to get their events into this campaign.

7.0 PR/SOCIAL UPDATES – ABBI AGENCY

Allegra shared the winter recap with the committee members.

- Launch of the final two luminaries: Nadia Guerriero in December and Lila Lapanja in January. The campaign was recognized with a Poppy Award by Visit California for “Best Content Marketing Initiative”.
- Snow + Winter Conditions: Focus on partner coordination and talking points, proactive regional pitching and FAM hosting activations. Content did feature real-time snow updates.
- Allegra showed placements on the PR side as well as Social and spoke to four activated influencers in January and February that had an estimated impact over 2.2M Impressions and 73k Engagements.
- PR Placement Highlights: Brides Magazine and Visit California
- FAM Hosting: Vogue – Luxe and Adventure, Family and International FAMs.
- Media Missions: Southern CA (late fall), Bay Area and New York City (March)

Comments:

- Good takeaways from this winter was: 1) Interaction between all partners and 2) Sharing of content
- There is a need to educate or have restaurants/service industry partake in customer service training. Too many times locals talk negatively about conditions when the customer has had a perfectly great day on the hill.
- Daphne shared they are working on possibly activating more influencers in light of the recent snow Tahoe received. One influencer from the Bay Area, one from LA and one from Austin, Texas. There is also a new flight starting soon from Austin to Reno on Frontier.
- Highlight Dual Sports Day for the last 3 weeks of winter.
- Austin: lead the message with WinterWonder Grass.
- Spring is incredible scenic in Tahoe.
- Put more emphasis on different nationality/ethnicity in some of the creative or messaging that is done.

Looking ahead for spring 2018:

Key Themes: Mar – June

Winter Season: Snow, Apres, Dual Sport Days, Winter Human Powered Sports, Environmental “Green” Lake Tahoe (Earth Day), Bleisure (Business + Leisure), What’s New in Summer and Warm Weather Wellness.

Ongoing Snow Promotion: PR Outreach – Leverage significant snowfall, Social Media – Real-time visuals and videos, Giveaways – Partnering with Bay Area News Group and “Guess that Resort” Giveaways

Key Spring Feature: Shoulder Season Content Series: Apres Round-Ups, Dual Sport Day and Secret Season Activities. Luminaries Promotion: Luminaries Shorts and Repurposing current luminaries. Public Relations: Shoulder Season Hosting. Pre-summer: Lead into summer and snow season.

8.0 CONSUMER MARKETING/UPDATES

Winter Recap:

- The winter campaign began in November with a mixture of SEM, retargeting digital, video and social, native advertising, animated programmatic display, rich media and social media conquering.
- Additionally, monthly email marketing was added into the mix, giving us an opportunity to reach people with longer message, as well as digital billboards in both Los Angeles and San Francisco Bay Area.
- In early January, the experiential campaign took place throughout Los Angeles, strategically scheduled to coincide with the digital billboard campaign.
- Winter Media launched in November 2017 with 48 million impressions served to date. \$311,000 total spend, 56,000 website visits, 14,000 users spent more than 115 seconds on the site; 1 in 4 users and \$22 per TOS conversion
- March Push: Instagram Stories Ads, Paid Social, Programmatic display – weather targeted ads (opensnow.com, weather.com), Email blast to opt-in subscribers, potentially billboards with regular image updates to show “real time” conditions.
- Alexis shared the display ad examples, social ad examples and snapchats ad examples.

Comments:

Daphne brought up the potential for billboards in the Bay Area and building more awareness. She asked for the committee members to provide feedback.

- Concerns with Billboard or Outdoor is that it is not targeted.
- The money better spent in Austin in conjunction with the new flight to Austin.
- Look into Texas Ski Week – great opportunity. It may be too late this year.
- Andy said it is extending the awareness we did earlier this season but said he is ok not doing it too.
- Empty nester, dual income personas are more impulsive. Have it be more strategic to the personas that has been identified or take advantage of opportunities in Austin.
- Daphne shared the cost for the billboard is about \$25k.
- Daphne shared that funds were shifted from April budget to March to maximize our efforts since we received more snow.
- IKON will be making a lot of “noise” in LA so it could be good to spend more resources in that market.
- **Action: Question for Walt: If we don’t do billboard, where could this additional funds be spent? What are the opportunities?**

Summer Preview of FY 2018/19 Plan Discussion:

- Geographic targets: Los Angeles, New York and Austin.
- Target Persona #1: Workaholics (Age 25-49, Higher education, Dual income/no kids), Target Persona #2: Experiential Families (Age 35-54, Higher household income, Seeking new experience with the whole family) and Target Persona #3: Outdoor Enthusiasts (Age 18-34, Focus on health, Risk takers looking for new adventure).
- Media Mix. Year-round media spend will continue this summer, including SEM, retargeting display and video, and social media retargeting.
- Summer Creative: Assets to be developed this summer include: Dedicated landing pages for all paid media, focusing the message for the specific audience personas. Mixture of dynamic social media ads and Facebook canvas ads, animated programmatic display ads, Native advertising that focuses on the targeted personas, New photo and video assets to be used for this season and future years.

Human Nature Campaign Evolution:

New Trends: **Cut the clutter** (provide content specific to each targeted persona), **Encourage engagement** (have conversations that curate recommendations based on types of vacations travelers are seeking), **Feature more events** (a traveler’s eye is often drawn here first), **Authentic Content** (include more video, Instagram-type content and other user-generated photos/info on the landing page, **Improve the user experience** (create the ultimate resource for consumers interested in a vacation. Highlight various experiences available and show visitors where in North Lake Tahoe they can enjoy the activities.)

Alexis shared this ads on the Human Nature Campaign and it’s called Live it Up and shared the statement. She went through the design element and the different types of experiences that would live on the main page. Sub-pages would have customized information pertaining to that audience.

Comments:

- Brett mention there is research on Top Ten, and if you change it to Top 4 or Top 6 you will receive more engagement.
- Utilize the Visit California data and make sure it is matching up with nightlife for example.
- There were questioned raised and concerns on these landing pages, and how they interact with the rest of the site as it sounds like they are more micro sites. Why wouldn’t they just be built under the current site structure? Alexis shared it would still be hosted on the same server and it would not impact traffic and it would still be included in the google analytics account. Alexis shared there is more freedom to design it the way they want to.
- Other concerns were the filter that will be used on the different personas. Alexis shared the filter could be removed on the lodging side. This portion needs to be looked it more closely.
- **Actions: The committee member asked to see examples of creative on the site and examples of banners (with images built in).**
- **Action: Next meeting needs to be scheduled for May.**

9.0 REVIEW AND DISCUSSION OF ORGANIZATION’S GUIDING PRINCIPLES – DAPHNE LANGE

Daphne shared the drafting guiding principles and asked the committee members for feedback. She explained the process and shared it would eventually go to the board. Are there other principles that should be included?

- Include the time periods for the spring and fall for the booking strategy.
- Adding on the last: setting goals and auditing against the goals.
- What terms are we using in Marketing versus Tourism Development. "This is what we are doing versus what you are doing". This needs to be more comprehensive in the way we explain it to our constituents.

10.0 REVIEW AND DISCUSSION ON FY 2017/18 BUDGET REFORECAST – LANGE/CHAPMAN

- Daphne stated she has gone through the process with each manager to identify spend and where there is savings.
- \$47k is currently not allocated.
- There were some discussion on anticipated impact on Q3 and possible shortfall. Andy said they do not anticipate that funding will be reduced to the coop.
- Andy stated two events were moved into the coop; Big Blue Adventures and the Tahoe Film Fest.
- Brett mentioned there are opportunities to create a coastal campaign for "June gloom".
- Andy said more discussion around this topic could be done in an e-mail.

11.0 REVIEW OF YTD FINANCIAL REPORT - CHAPMAN

- Andy shared the year-to-date financial report and pointed out the A/P Aging Summary the \$250k being owed to Richter7 is being facilitated.
- Andy apologized as the balance sheet should have been comparison to last year and the budgeting process for next year will start soon.
- At the next meeting the same process will have been completed through March end.

12.0 COOPERATIVE AGREEMENT REVIEW UPDATE

- The current Marketing Cooperative Agreement will be reviewed by the two entities. When the agreement was updated in 2015 the "term" part was removed because it was not needed. The county try to insert some language into the 5 month contract so it was requested that this be reviewed with the 2 boards and a legal council.

13.0 NEW BUSINESS

No comments.

14.0 OLD BUSINESS

No comments.

15.0 PUBLIC COMMENTS

No comments.

16.0 ADJOURNMENT

The meeting was adjourned at 5:00 pm.



north lake tahoe

NLT Marketing Cooperative Committee Meeting Minutes – Wednesday, June 6, 2018

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

1.0 CALL TO ORDER

The meeting was called to order at 10:14 am and a quorum was not established.

2.0 PUBLIC COMMENTS

No public forum.

3.0 ROLL CALL

Committee member: Brett Williams, Andy Chapman, Daphne Lange, Christine Horvath, Heather Bacon

Other in attendance: Amber Burke, Alexis Kahn, Anna Atwood

4.0 APPROVAL OF AGENDA

- **The agenda was accepted as presented.**

5.0 APPROVAL OF MARCH 13, 2018 MEETING MINUTES

- **The meeting minutes will be tabled until next meeting.**

6.0 BUDGET REFORECAST UPDATE – LANGE/CHAPMAN

Daphne shared the 2017/18 Updated Marketing Cooperative budget. She stated this is constantly being updated and this also relates to item I on the agenda for today, media spend reallocation. The carry-over amount is \$81K and with the proposed media spend it will be brought down to about \$40K. Daphne also highlighted that there is money budgeted for a lifestyle photo shoot including video regarding arts, culture, wellness and culinary.

Comments:

- Will there be some shots of lodging properties? Alexis shared this is more focused and arts & culture.
- Alexis shared video is outperforming still photography so there will be a focus on getting more video assets.
- Andy shared there already is extensive videos on local luminaries and quite a bit on human powered sports, both winter and summer. There was a huge expense associated with this so it's important that this is shared with Augustine.
- Brett also shared it's important to get shots for when we have low snow years of other activities such as building a snow man, fire pit shots etc. (Winter lifestyle creative)
- Heather stated not to forget about gaming and nightlife as an "activity" after playing outside. Andy stated that we have some footage and stills from Ale Trail on gaming and nightlife.
-

Action: Get a hard drive from the Abbi Agency with the video/picture content.

Directions: Due to not having a quorum, Daphne will do an e-mail vote and have conversations with the committee members who didn't attend today. The committee members in attendance did not have any rejections with the above recommendations.

7.0 2018/19 DRAFT BUDGET FOR REVIEW AND APPROVAL

Daphne reviewed the 2018 draft budget with the committee members. The NLTRA contribution increased about 3.4% this year and Incline Village contribution increased 2.2%. She touched on some of the budget numbers that is seeing a change from last year.

- Consumer side, Paid Social increased from last year. (Programmatic display and Digital Display Retargeting was added.)
- 46K will be left for additional opportunities.
- Leisure Sales – Adding some PR efforts in Australia
- Leisure Sales contract with UK that NLTRA shared with Mammoth Lakes Tourism has changed. They have gone out on their own.
- Reduced cost from the Abbi Agency on the International PR efforts.
- Canada was added as a market and we see that as one of our top markets in our spending and great airlift into SFO. (Both states, California and Nevada are investing more money into this market)
- Conference Sales has gone down in budget due to more efficient budgeting. (some of the non-performing tradeshows were removed and some new were added such as Connect)

Directions: Due to not having a quorum, Daphne will do an e-mail vote and have conversations with the committee members who didn't attend today. The committee members in attendance did not have any rejections with the strategy of this budget.

8.0 UPDATE ON SUMMER 17/18 CONSUMER PROGRAMS - AUGUSTINE

Alexis shared the Summer 2017/18 Preview. The following are the targeted personas:

1. Family Memories (age 35-54)
2. Outdoor Experience Seekers (age 25-44, no kids)
3. Someone older/Something new (age 45-64)

Media mix: year-round media spend will continue this summer, including SEM, retargeting display and video, and Social media retargeting. The summer campaign will include a mix of: Native advertising, Programmatic display, video, Rich media and Social media conquering.

Summer Creative: Assets to be developed this summer include:

- Dedicated landing page for all paid media, focusing the message for the specific audience personas.
- Mixture of dynamic social media ads and Facebook canvas ads.
- Animated programmatic display ads.
- Native advertising that focuses on the targeted personas.
- New photo and video assets to be used for this season and future years.

Comments:

- Christine recommended for the photo shoot to get an agreement of what the different people require in the pictures. (Bike helmets, Ski helmets, dog leashes, etc.)

9.0 MEDIA SPEND REALLOCATION DISCUSSION FOR APPROVAL - RICHTER 7

Daphne stated these are not new programs we are amplifying programs already running, reallocating budget from the Experiential Line and Additional opportunities. Walt shared his recommendations based on which item is working better and additional items that can impact consumer and messaging.

Recommendations:

1. SEM - \$5,000 (225,000 impressions)
2. TripAdvisor - \$5,000 (225,000 impressions)
3. Instagram Stories - \$5,000 (550,000 impressions)
4. Snapchat - \$2,000 (add to current 3k) (\$500,000 impressions)
5. Weekend Sherpa - \$15-20,000 (500,000 impressions)
6. Facebook Live - \$1,000 (any live video should be promoted) (100,000 impressions)
7. Rich Media - \$10,000 (extend our rich media coverage) (300,000 impressions)
8. Email - \$5,000 (increase list size, email is one of our top performer too) (200,000 impressions)
9. San Francisco Chronicle - \$4,000 (print in Reno/Tahoe Special Section)

These items will increase our exposure to our target fly markets right in time for summer.

Comments:

- Would the Chronicle piece have an online portion? Alexis shared if there is editorial, the editorial would be online. There were discussion on this items, timing is not great (7/1/18). It was recommended to push a midweek message.
- Is SEM directed at destination markets or drive market? Walt stated it would be directed towards the evergreen campaign.
- Are we seeing any trends with the launch of the new Frontier flight from Reno-Austin? Texas is hot and miserable in the summer. There may be some opportunities here. Walt stated that he will look at that data and keep in consideration for next budget.
- Weekend Sherpa is a good chunk of money. Could you give more insight to this item? Walt shared this is really strong in LA and San Francisco. They create the content and push it out to their database. It is really geared towards hiking & adventures. Weekend Sherpa has 90,000 followers/subscribers in the LA and about 120,000 in the Bay Area. Heather recommended that we include gaming and nightlife in some of the pictures.

Directions: Due to not having a quorum, Daphne will do an e-mail vote and have conversations with the committee members who didn't attend today. The committee members in attendance did not have any rejections with the above recommendations.

10.0 SMARI RESEARCH PROPOSAL FOR APPROVAL - LANGE

Daphne did a quick recap of Smari (Strategic Marketing & Research Insights). Smari has developed a procedure for measuring the effectiveness of marketing efforts and providing meaningful feedback. This research will be used to find out what spend moves is more effective through the various ad vehicles and subsequent travel to the destination.

Comments:

- Schedule a higher level strategy after Smari presents the results in August.

Directions: Due to not having a quorum, Daphne will do an e-mail vote and have conversations with the committee members who didn't attend today. The committee members in attendance did not have any rejections with Smari proposal.

Action: Provide the most recent Strata research information to Denice at Smari.

The following was recommended for upcoming marketing cooperative meeting schedule:

- No meeting in July, October and December
- Meeting in August, September and November

Action: Send out a doodle poll on future meeting schedule.

11.0 DESTIMETRICS RESEARCH PROPOSAL FOR APPROVAL - LANGE

Daphne shared this is something that our organization will continue as its valuable data and the rep is coming out. Destimetrics is looking for more participation from our local lodging providers.

Directions: Due to not having a quorum, Daphne will do an e-mail vote and have conversations with the committee members who didn't attend today. The committee members in attendance did not have any rejections with the Destimetrics proposal.

12.0 NEW BUSINESS

No comments.

13.0 OLD BUSINESS

No comments.


14.0 PUBLIC COMMENTS

No comments.

15.0 ADJOURNMENT

The meeting was adjourned at 12.10pm.

Marketing Coop Committee Meeting – August 2018



north lake tahoe

Program Updates

- **General Consumer Update**
- **18.19 Marketing Coop Budget Breakout**
- **Media Flowcharts**
- **Leisure Sales**
- **Conference Sales**
- **DCI Canada Team Presentation**

Tourism Development Consumer Updates

- SMARI Research wrapping up – data is here. Look to present late September
- Summer Consumer efforts wrapping up - Targeting Flight Markets – NY, LA, Austin
- Fall Creative in development – Mid-September Launch
- Noteworthy Publication Placements – Average Advertising Equivalency \$132,547
 - Sunset.com – 2018 Destinations of the Year
 - RGJ: [Reno-Tahoe's Top 12 annual big events and festivals](#)
 - Red Tricycle: [No Snow Needed: Tahoe in the Summer](#)
 - SacBee: [Fireworks, parades and more fireworks!](#)
 - Tahoe Weekly: [4th of July celebrations](#)
 - VIA: [The Best Lakes for Summer Fun in the West](#)
 - Craft Beer Connoisseur– [15 Unique Ale Trails](#)
 - The Mercury News – [5 fab Lake Tahoe restaurants for](#)

lakeside dining

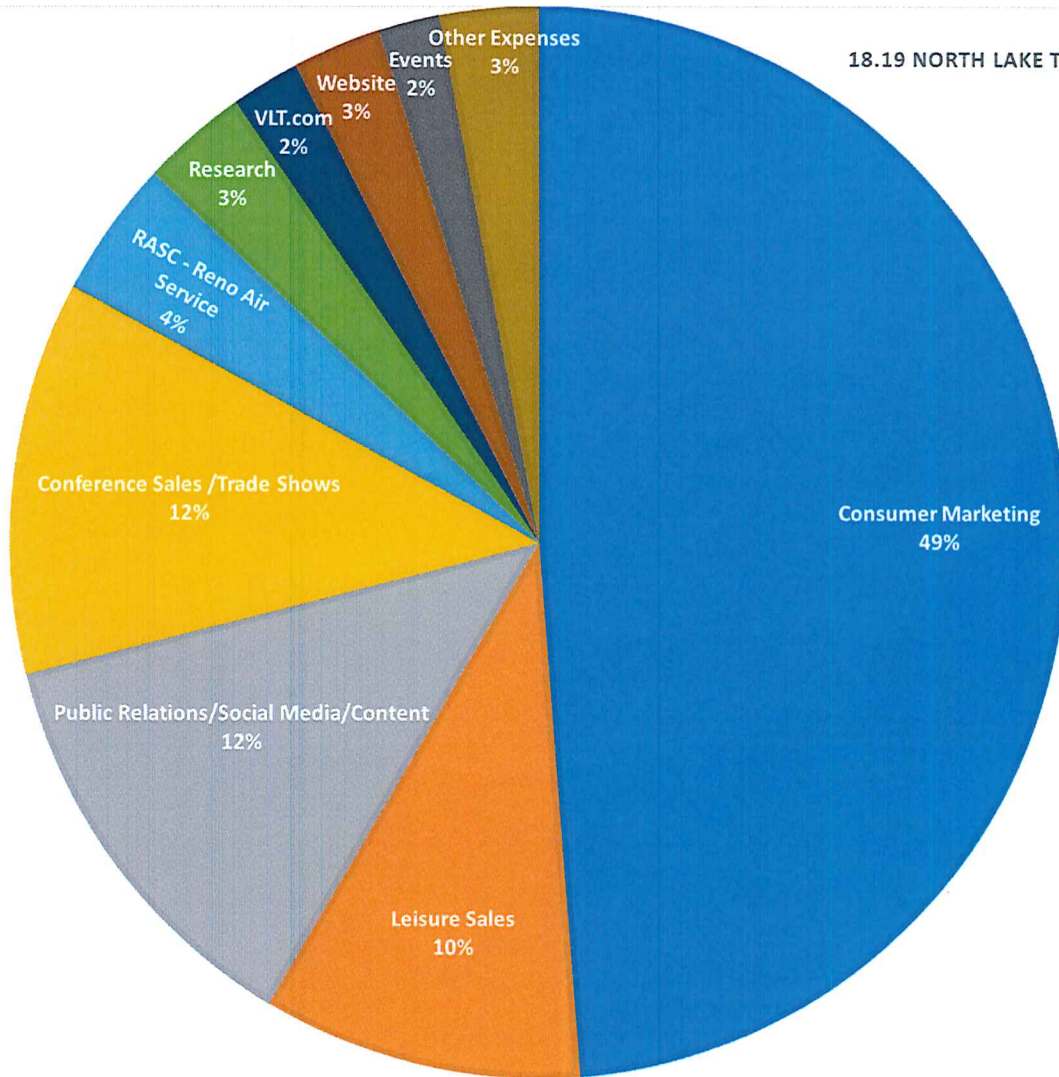
Social Media

- 1,972 New Fans across all platforms – FB, Twitter, Instagram
 - Total Impressions: 4.4M
 - Total Engagements: 96K

Events

- Autumn Food and Wine
- Spartan Race

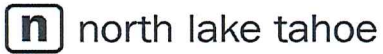
18.19 NORTH LAKE TAHOE MARKETING COOP BUDGET



\$1,175,279	Consumer Marketing
\$235,445	Leisure Sales
\$301,080	Public Relations/Content
\$286,295	Conference Sales/Trade Shows
\$100,000	RASC - Reno Air Service
\$78,350	Research/Destimetrics
\$51,000	VisitingLakeTahoe.com
\$65,000	Web Content Manager/Web Maintenance
\$45,000	Special Events
\$72,374	Other Operational Expense - ex) fulfillment/mileage, weather cams
\$2,409,823	TOTAL


*Full Budget Detail to be handed out

18.19 Meetings/Conference Media Flowchart



2018-19 MEDIA FLOWCHART		4Q2018																								1Q2019												2Q2019																																																																			
CAMPAIGN MOCC		JULY		AUGUST			SEPTEMBER			OCTOBER			NOVEMBER			DECEMBER			JANUARY			FEBRUARY			MARCH			APRIL			MAY			JUNE																																																																							
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October Issue: Additional Distribution at IMEX																																																				AV																																																					
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November Issue: CVB Update Issue - Matching Advertorial																																																				AV																																																					
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Destination California Conference																																																				Date TBD		N/A		AV																																																	
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Net Media Investment		\$15,280		\$1,942			\$3,084			\$4,842			\$9,734			\$1,642			\$5,984			\$2,642			\$4,034			\$4,542			\$8,384			\$3,292			3,205,000		\$65,000																																																																		
																																																																																				Net Media Investment		\$66,000																			
																																																																																				Media Commission		\$8,450																			
																																																																																				Digital Ad Serving		\$200																			
																																																																																				TOTAL SPEND		\$75,650																			

Leisure Sales Strategy & Program Development

 north lake tahoe

Today's Overview

- Leisure Sales Areas of focus
- Leisure Sales Strategy
- Understanding the business models & companies within the leisure sales world
- Product Development in North Lake Tahoe
- How we track international visitation to North Lake Tahoe

Leisure Sales: Areas of Focus

International Media → PR Contract with Australia & Contract FAM work with Abbi Agency

Domestic Travel Trade → Online Tour Operators (OTAs), Domestic Wholesale and Receptive Tour Operators

International Travel Trade → Canada Office with Destination Counsellors International, UK/Ireland Office with Black Diamond, Australia office with Gate 7

Tier 1 Markets → USA, United Kingdom/Ireland, Australia/New Zealand, Canada, Mexico

Tier 2 Markets → China, France, Germany, Brazil

New Emerging Markets → India, South Korea, Argentina

Leisure Sales: Strategy

Press Trips → Work closely with industry partners to curate itineraries that highlight the destination. NLT's goal is to host qualified media FAMs from our Tier 1 & Tier 2 markets, up to twelve annually.

Trade Familiarization Tours → To bring influential travel sellers to NLT to education on the destination and products that can be promoted to consumers through travel agents and tour operators. This assists with influencing travel decision-making and shapes how the destination can be packaged.

Tradeshows & Sales Missions → Attend industry tradeshows and events, both internationally and domestically, to connect with key markets and expand NLT's brand awareness.

Product Development → Increase lodging and activity product available to travel agents and tour operators in order to increase sales to the destination during both non-peak and peak times.

Leisure Sales: Strategy

Partner Relationships → Build relationships with local and state partners; including, RSCVA, South Lake Tahoe, Visit California, Travel Nevada, Reno Tahoe Territory, High Sierra Territory and NLT partner resorts and activity providers.

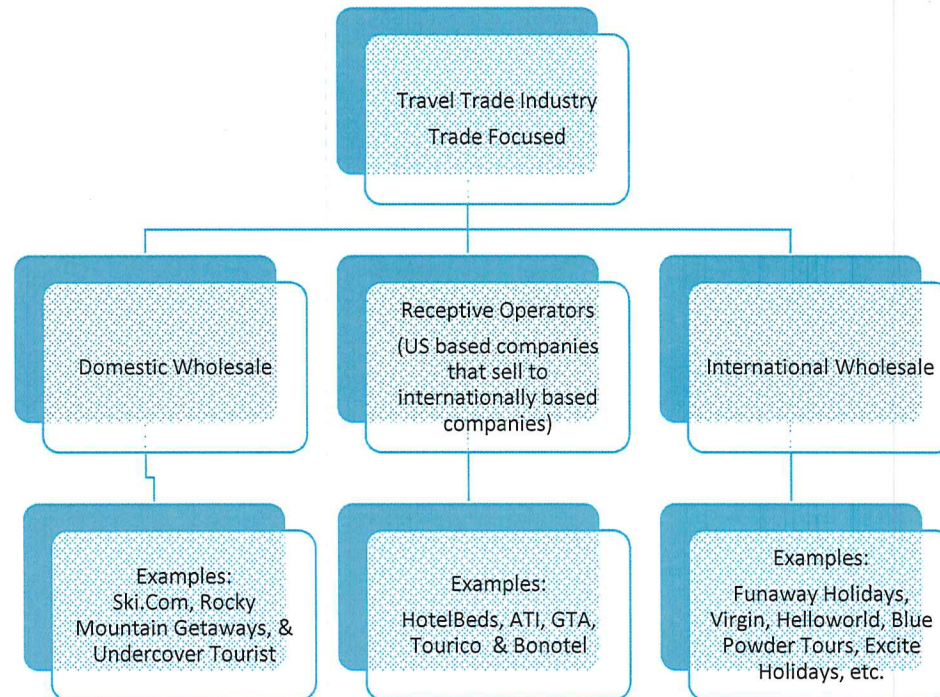
Marketing Collaboratives → Increase brand awareness and booking demand in key markets through marketing campaigns.

California Star Program → Visit California's travel trade digital platform to engage with travel trade audiences on a global scale. This tool is used for education and content distribution.

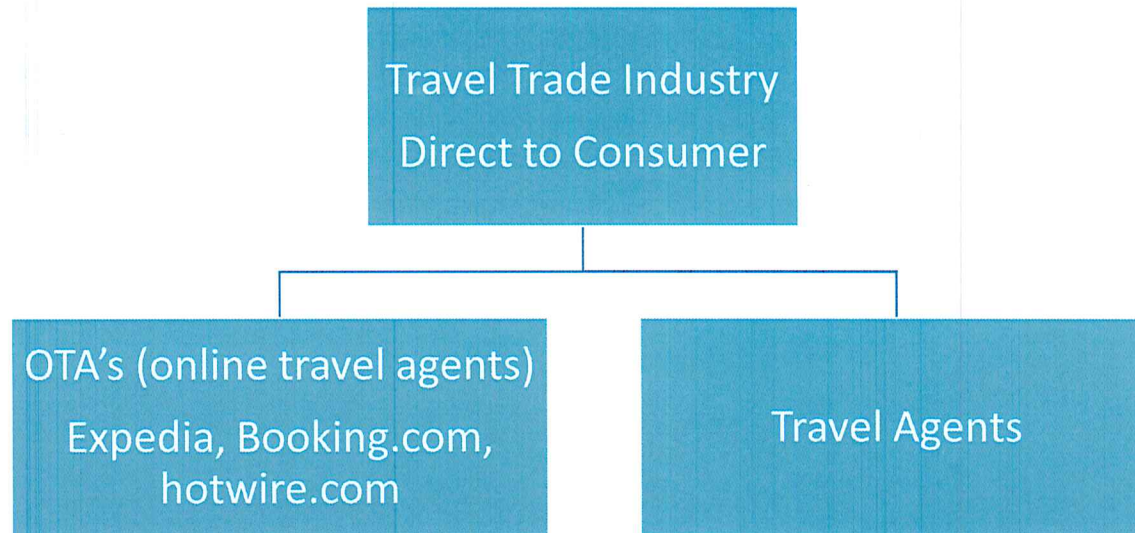
Data Tracking → VisaVue Tracking Program provides us reporting on international and domestic travelers to North Lake Tahoe.

Leisure Sales

Understanding the Booking Channels



Leisure Sales Direct to Consumer



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Product Development

Increasing lodging & activities available for sale

Increased Product Placement:

HotelBeds: (2) hotels in 2015 to (7) hotels in 2017

- Including small properties

GTA: (1) hotel in 2015 to (3) hotels in 2017

Tourico: (1) hotel in 2015 to (3) in 2017

Bonotel: (2) hotels in 2015 to (5) hotels in 2017

- Increased activity product as well

Increased Brand Awareness in 2017:

Tradeshows/Sales Missions: 14

International PR Trips: 12

Travel Trade FAMS: 16

Site Inspections: 24

Tracking International Markets...

We take into consideration data provided by both Visit California & Travel Nevada.

In 2016, we signed on to track international visitation through Visit California's VisaVue Data Tracking Program.

2016 Annual Data:

\$4,424,284

2.6% growth from 2015

Average cardholder spend: \$252.95

Top Countries
United Kingdom *
Canada
Australia *
China
Mexico *
France *
Germany

2017 Annual Data


\$5,297,706

19.7% growth from 2016

Average cardholder spend: \$264.51

Top Countries
United Kingdom *
Canada
Australia *
China
Mexico *
France *
Germany
Argentina

Conference Sales

 north lake tahoe

Conference Sales – Key Functions

- Generate group sales leads for hotel partners
- Act as a liaison between meeting planners and hotel partners during the sales process.
(single point of contact)
- Assist hotels in converting leads into booked business
- Coordinate and execute client site visits
- Attend trade shows in key strategic markets
- Conduct sales calls/customer events in strategic markets

Conference Sales: Strategy

Strategic Markets →

California. Which historically generates roughly 70% of conference bookings. Primarily in Northern California but with significant efforts in southern California as well.

Cities with Significant Air Lift into Reno/Tahoe International Airport. Those destinations include San Francisco, Los Angeles, Portland, Dallas and Phoenix.

Washington DC and Chicago where the majority of national associations are headquartered.

Conference Sales: Strategy

Media Plan → Annual media plan that includes print and digital advertising in various meeting industry outlets regionally and nationally. The plan also includes a small presence on social media.

Tradeshows & Sales Missions → Attend industry tradeshows and conduct sales calls in key markets. The current trend is away from the large national tradeshows which have generally been showing decreased response and towards smaller, regional appointment-based shows which have provided better results.

In Market Customer Events → Host customer events in key strategic markets. These events are an excellent way to interact and build relationships with customers in a less formal but very memorable setting. FY 2018-2019 events will include a San Francisco Giants game, San Jose Sharks game, a cooking class and Topgolf in Sacramento.

Conference Sales: Strategy

Familiarization Trips → Bring customers with current or future business to North Lake Tahoe to experience the destination first hand with the goal of influencing them to bring their meetings to the area.

Strategic Partnerships with “Third Parties” → Continue to build on the strategic partnerships we have developed with HelmsBriscoe and HPN. This year staff will attend the HB Annual Business Conference, HPN Annual Partner Conference and ConferenceDirect CDX.

Create a Client Advisory Board (CAB) → The Board will consist of a representative group of professional meeting planners and industry leaders who will meet periodically to offer knowledge of the meeting and hospitality industry and advice on strategy and innovative programs for North Lake Tahoe group sales initiatives. The Advisory Board is intended to be a catalyst for the creation of market centric, client focused ideas with the intent of generating additional group bookings.

Total Conference Spend

2016/2017 FY

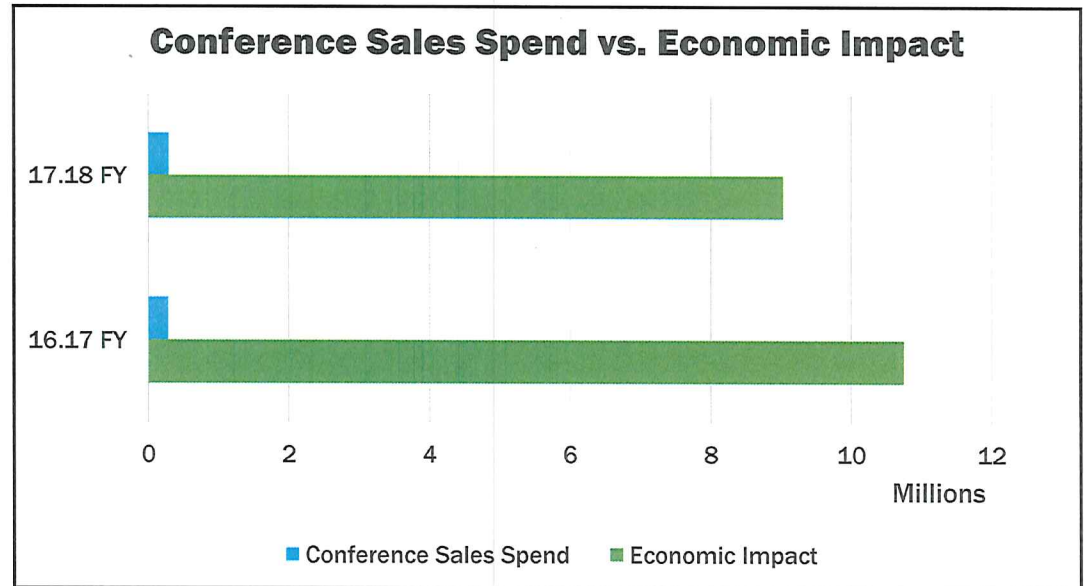
\$286,000

2017/2018 FY

\$294,890

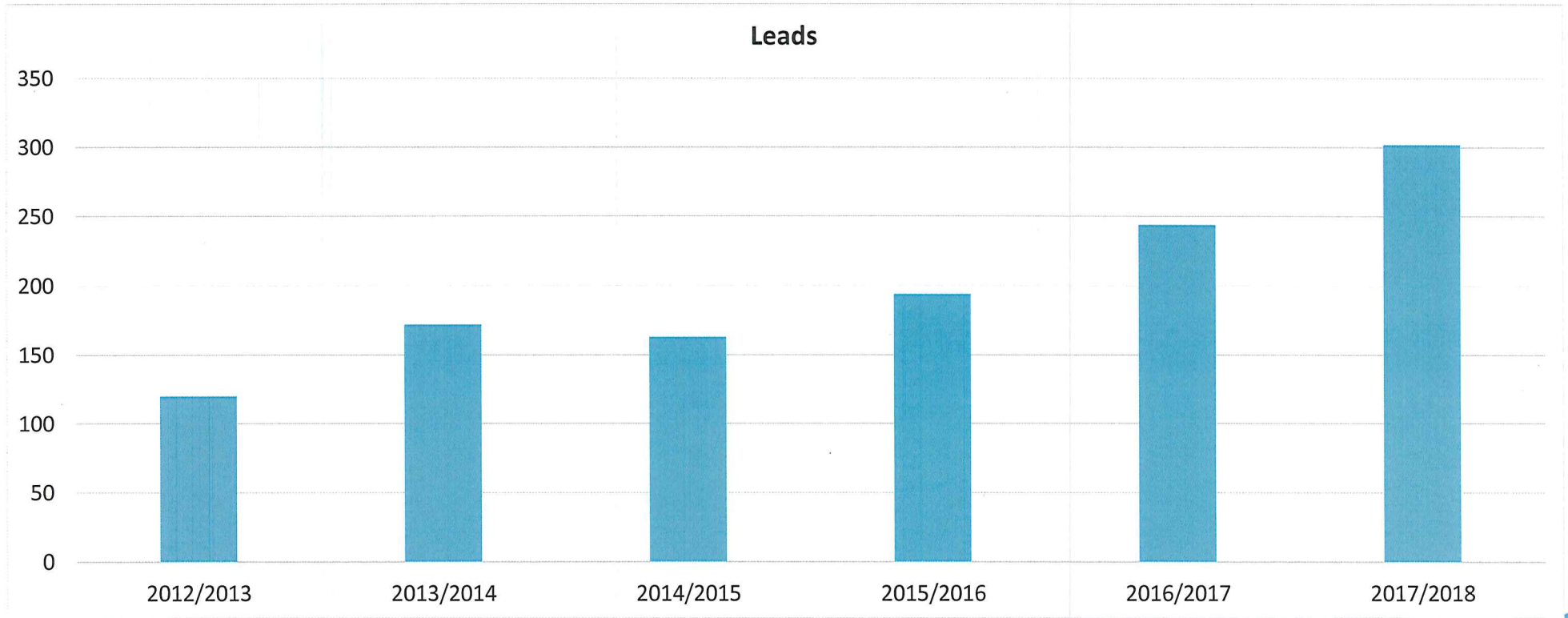
2018/2019 FY

\$286,295

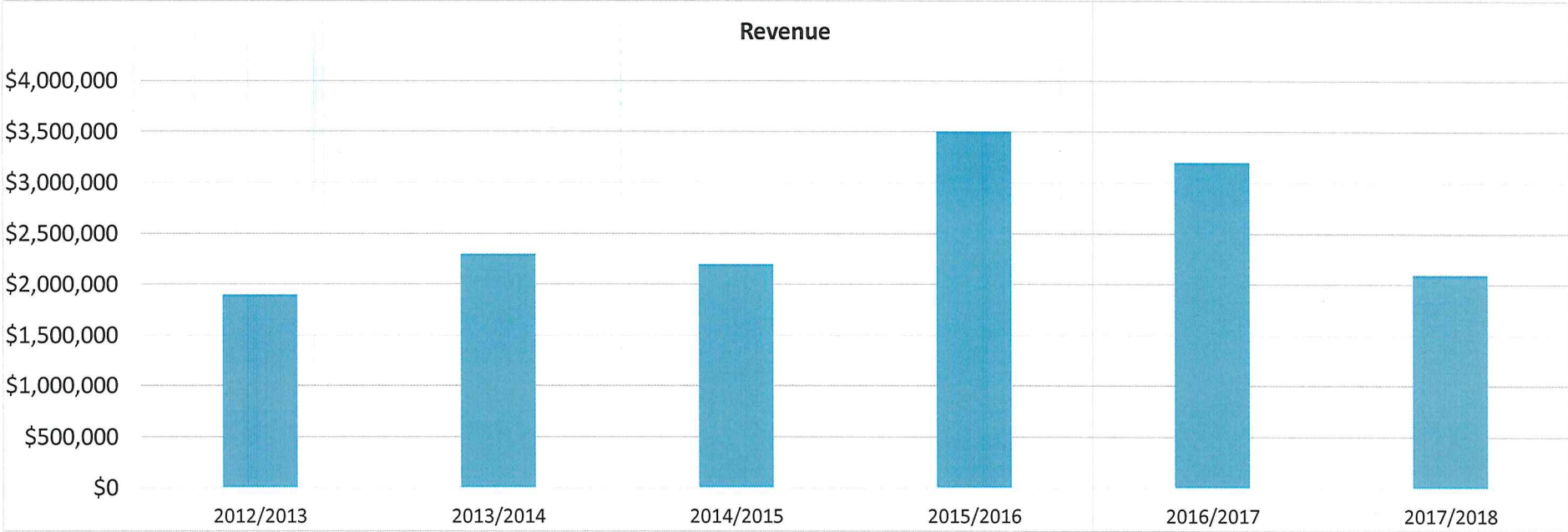


*Economic Impact Information used
Average Daily Rate to calculate based on
past group booking information

How we track success – Lead Generation



How we track success – Room Revenue





The Canadian Consumer

- Outbound Travel Trends to
 - the United States
- Prepared for the North Lake Tahoe Marketing Cooperative

• August 22, 2018



A QUICK WORD ABOUT DCI

58
YEARS
SPECIALIZING
IN
MARKETING
PLACES

500+
represented
places

cities
states
regions
countries

4 OFFICES

NEW YORK



LOS ANGELES



DENVER

TORONTO



60

MARKETERS
WITH A PASSION FOR
PLACES



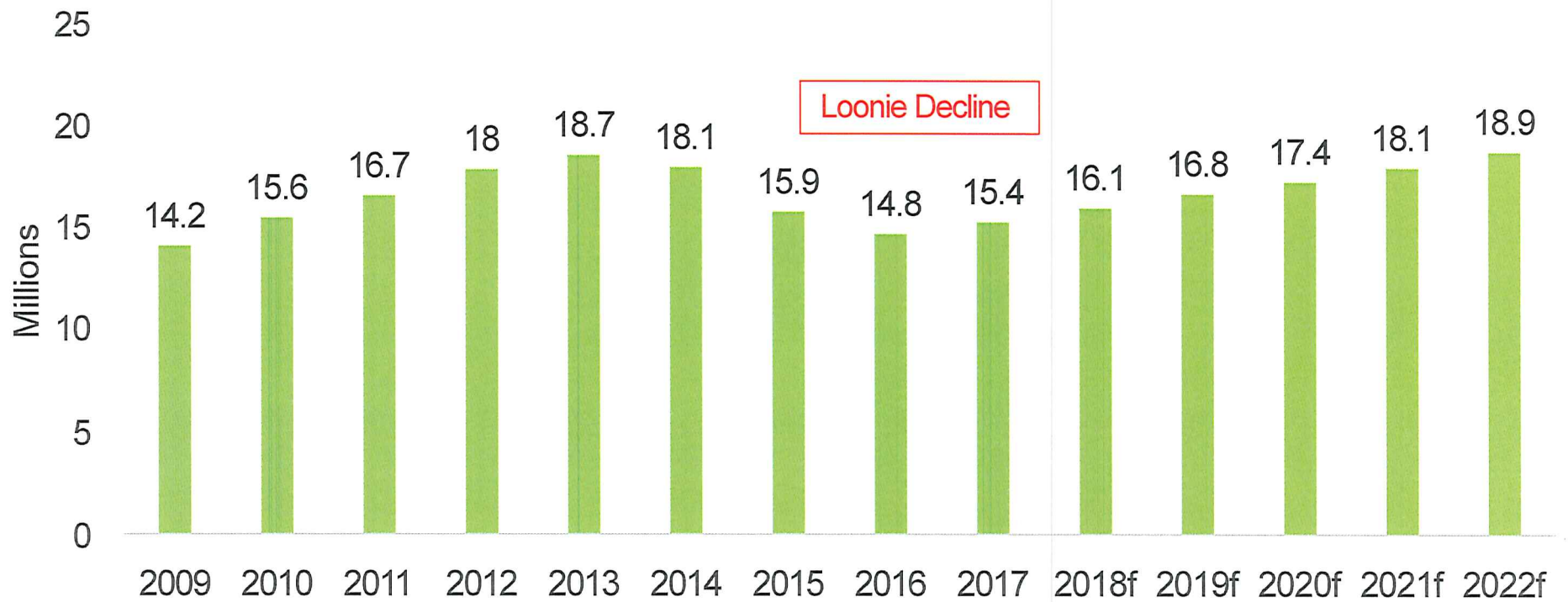
The Changing Face of the Canadian Consumer

- Baby boomers will continue to be the primary driver of outbound travel
 - Cohort expected to increase to 39 million by 2025
 - Older Canadians are healthier, wealthier and more mobile than predecessors
 - In the long-term, leisure destinations in the U.S. will be more popular for the older population due to proximity
- The foreign-born population has tripled in the past twenty years, and continues to grow
 - Projections indicate that by 2031, Canada's visible minority population could rise to 12.8 million, an increase of 143 per cent
 - The proportion of Asian-born persons will continue to steadily increase, while the proportion of persons born in Europe continues to decline

What Is (or Isn't) Impacting Outbound Travel to U.S.

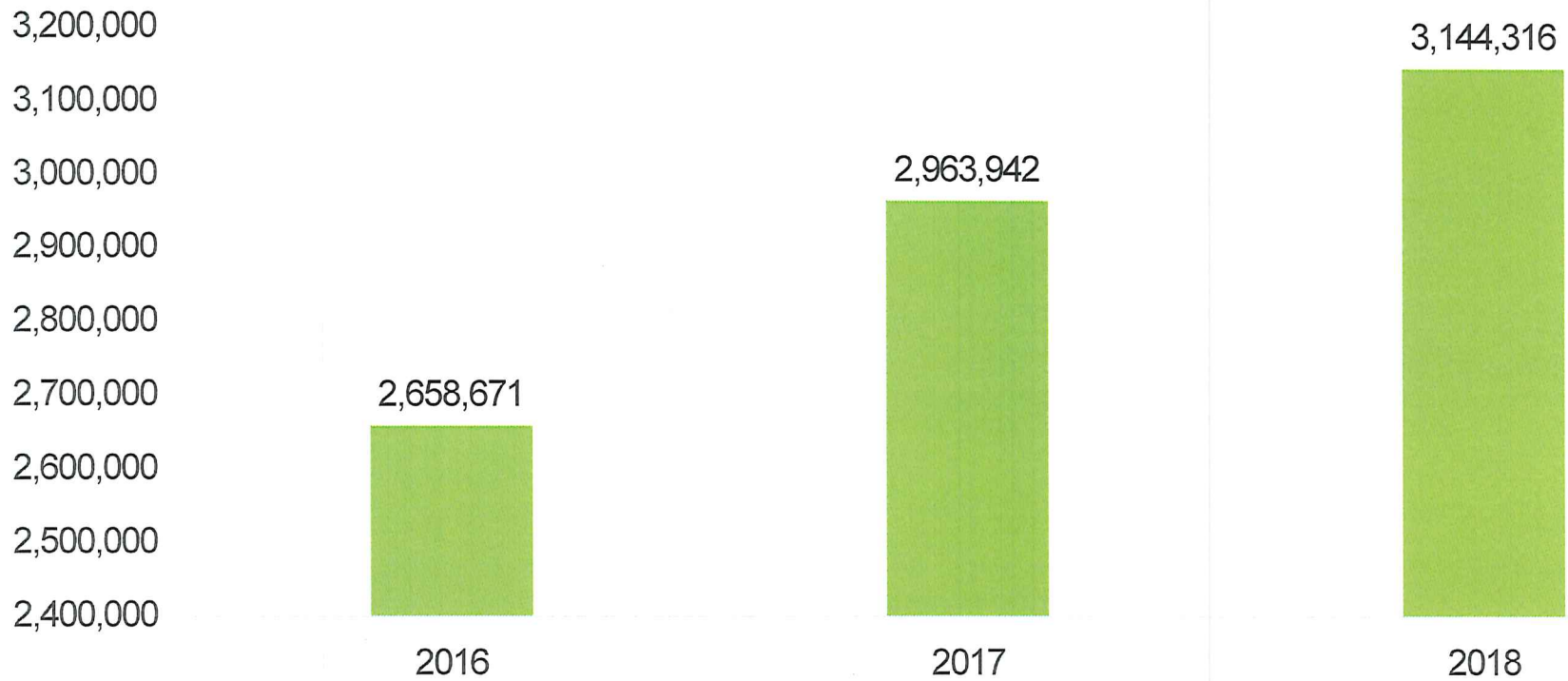
- President Trump not impacting inbound travel as significantly as expected
 - 33.7 percent of Canadians indicated the current administration would negatively impact travel intentions to U.S (October, 2017)
 - Social statements did not translate into significantly lower trip volumes
- Economic and demographic factors have had more of an impact on activity over past few years
- Forecasted average exchange rate in the high-seventies will likely result in additional gains in overnight leisure trips to the U.S.
- Trade issues remain a concern

Outbound Overnight Leisure Trips to U.S.



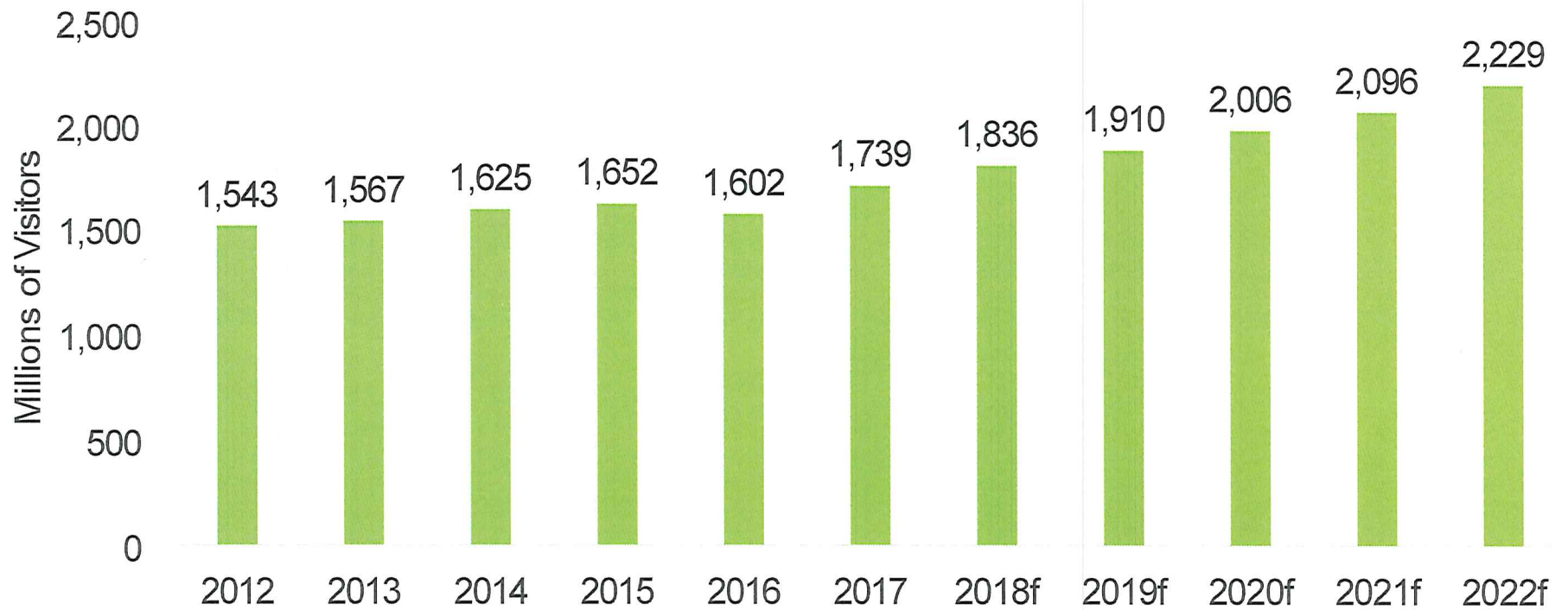
Source: Conference Board of Canada

Direct Seat Capacity to California 2016-2018



Source: Conference Board of Canada

Projected Canadian Visits to California



Source: Conference Board of Canada



Time of Travel

23%

January to March

16%

April to June

23%

July to September

14%

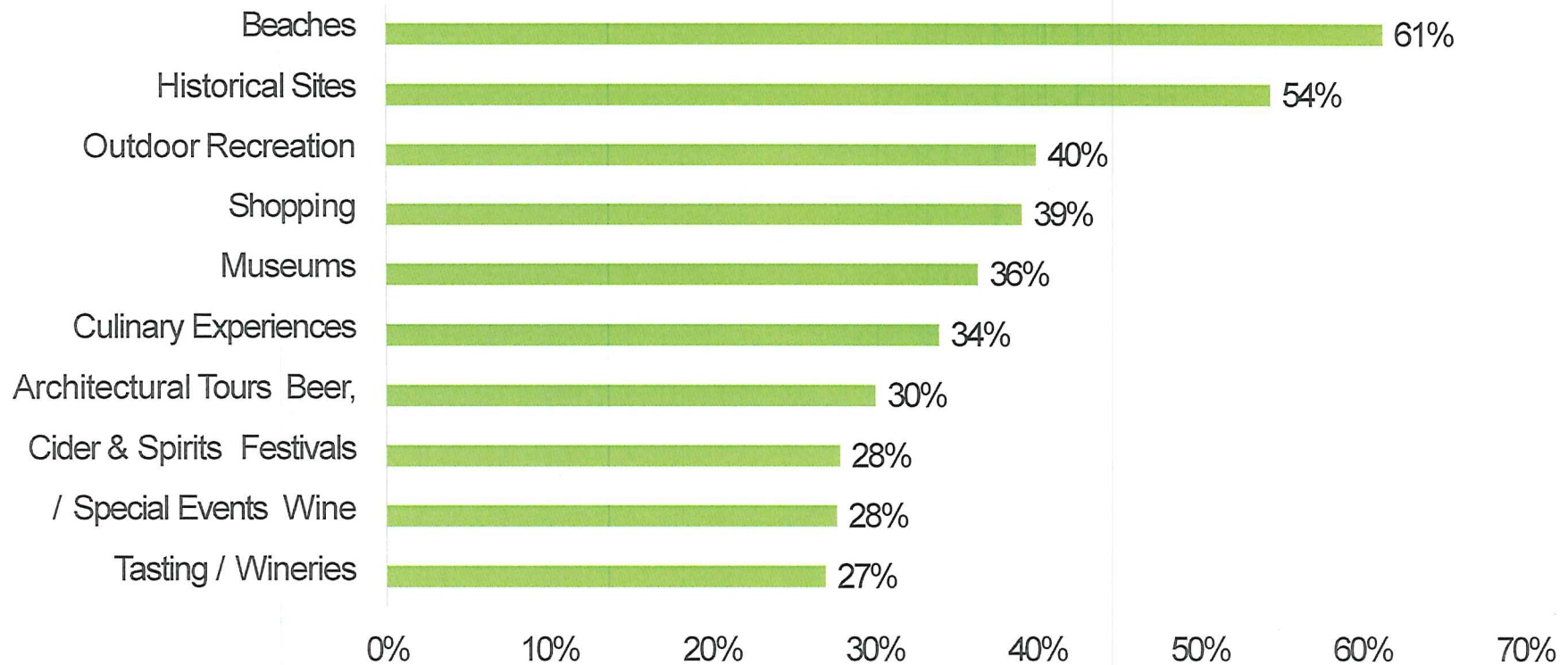
October to December

22%

Time of Year Doesn't Matter

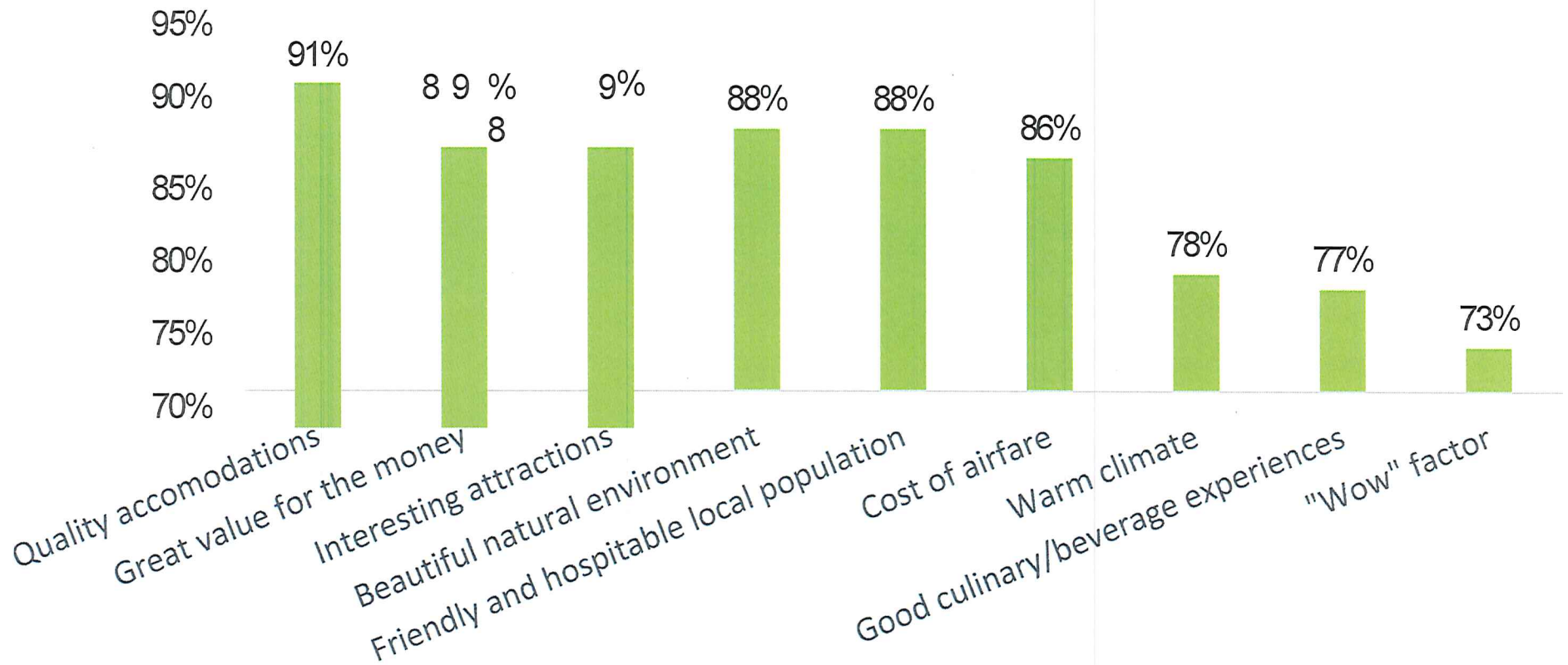
Source: DCI, "Capturing the Canadian Consumer"

Activities of Most Interest on Future Vacations



Source: DCI, "Capturing the Canadian Consumer"

Factors in Destination Selection



Source: DCI, "Capturing the Canadian Consumer"

Planning Phase

	By Car	Short Haul	Long Haul
< 3 months before departure	57%	28%	13%
Three to six months before departure	20%	43%	32%
Six to 12 months before departure	8%	20%	33%
12 months+ before departure	1%	3%	10%
I don't know	13%	7%	13%

Source: DGI, "Capturing the Canadian Consumer"

Booking Accommodations

	By Car	Short Haul	Long Haul
< 3 months before departure	61%	40%	27%
Three to six months before departure	20%	38%	37%
Six to 12 months before departure	5%	15%	22%
12 months+ before departure	1%	2%	4%
I don't know	12%	6%	11%

Booking Airfare

	Short Haul	Long Haul
< 3 months before departure	40%	21%
Three to six months before departure	41%	43%
Six to 12 months before departure	13%	23%
12 months+ before departure	1%	2%
I don't know	5%	10%

Key Findings

- Canadians Travel Differently than Americans
 - More likely to travel internationally
 - Prioritize traveling internationally with family
 - Favor vacations with outdoor recreation component
- Growing diversity of Canadian population offers opportunities for California destinations
- Travel patterns of Canadians favor four-season destinations
- Key market opportunities in eastern provinces
 - Ontario and Quebec offer large volumes of travelers and are predicted to see strong economic growth

QUESTIONS?