

JOINT BOARD OF DIRECTORS MEETING
North Lake Tahoe Resort Association & Incline Village Crystal Bay Visitors Bureau

Date: Wednesday, November 7, 2018

Time: 9:30 a.m. – 11:00 a.m.

Location: North Tahoe Event Center
8318 N. Lake Blvd., Kings Beach

AGENDA

TO CALL IN: 1-712-770-4010, ENTER CODE 775665#

The Board of Directors of the North Lake Tahoe Resort Association and the Lake Tahoe Incline Village Crystal Bay Visitors Bureau will hold a joint board meeting on Wednesday November 7th, 2018 beginning at 9:30am. The meeting will be held at the North Lake Tahoe Event Center, located at 8318 N. Lake Blvd., Kings Beach CA 96143.

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 Boards, 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 beginning of the meeting. Comments based upon viewpoint may not be restricted by the Board.

*Estimated
Time*

- | | | |
|-------------------|---|---|
| 9:30 a.m. | 1. Convene as Joint Meeting of North Lake Tahoe Resort Association Board of Directors and Incline Village Crystal Bay Visitors Bureau Board of Directors
A. Establish North Lake Tahoe Resort Association Board Quorum
B. Establish Incline Village Crystal Bay Visitors Bureau Board Quorum | Chair: Adam Wilson
Chair: Blane Johnson |
| | 2. 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. | |
| 9:40 a.m. | 3. Marketing Cooperative History and Overview | Andy Chapman |
| 9:50 a.m. | 4. Action Item | |
| Page 2 | A. Motion: FYE 2017/18 Marketing Cooperative Financial Review | Bonnie Bavetta |
| 10:00 a.m. | 5. SMARI Insights, Report on North Tahoe Advertising Effectiveness and ROI
A. Richter 7 Introduction
B. Ad Effectiveness and ROI Study Report | Daphne Lange
Walt McRoberts
Denise Miller |
| Page 15 | | |

10:40 a.m. **6.** Review of 2018-19 Winter Marketing Campaign

Daphne Lange

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10:45 a.m. **7.** Directors Comments

10:50 a.m. **8.** 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.

11:00 a.m. **9.** Adjournment.

Support materials can be found at <https://www.gotahoenorth.com/north-lake-tahoe/business-community/incline-village-crystal-bay-visitors-bureau/> and at www.nltra.org. This meeting is wheelchair accessible.

Public Postings:

Incline Village Post Office

Crystal Bay Post Office

Incline Village Crystal Bay Visitor Bureau

Meeting Location

IVGID Office

Incline Justice Court

Nevada notices - <http://www.notice.nv.gov>

www.NLTRA.org



north lake tahoe

Chamber | CVB | Resort Association

Chair: Adam Wilson, Vail Resorts | Vice Chair: Samir Tuma, Tahoe City Lodge | Treasurer: Christy Beck, Squaw Alpine | Secretary: Brett Williams, Agate Bay Realty | Aaron Rudnick, Sierra Tahoe | Chris Brown, Elevation Law Firm | Dan Tester, Granite Peak Management | Gary Davis, JK Architecture Engineering | Greg Dallas, Sugar Bowl Resort | Jim Phelan, Tahoe City Marina | Karen Plank, Placer County Appointee | Kevin Mitchell, Homewood Mountain Resort | Lynn Gibson, Keoki Gallery | Stephanie Hoffman, Granlibakken Tahoe | Tom Turner, Tahoe Restaurant Collection

Advisory Committee: Erin Casey, Placer County Executive Office | Tom Lotshaw, Tahoe Regional Planning Agency



north lake tahoe

Incline Village/Crystal Bay Visitors Bureau

Chair: Blane Johnson, Sun Bear Realty | Vice Chair: Bill Wood, Crystal Bay Club | Secretary: Michael Murphy, Hyatt Regency Lake Tahoe | Heather Bacon, Boulder Bay/Tahoe Biltmore | Bill Watson, Thunderbird Lodge Preservation Society



Chair: Christine Horvath, Squaw Valley Alpine Meadows | Vice Chair: Chris Skelding, Hyatt Regency Lake Tahoe | Bill Wood, Crystal Bay Club | Brett Williams, Agate Bay Realty | Heather Bacon, Boulder Bay/Tahoe Biltmore | Kelly Campbell, Vail Resorts | Andy Chapman, Incline Village Crystal Bay Visitors Bureau | Cindy Gustafson, North Lake Tahoe Resort Association



north lake tahoe

Chamber | CVB | Resort Association

MEMORANDUM

Date: 11.6.18

TO: NLTRA & IVCBVB Board of Directors

FROM: Bonnie Bavetta, CFO, NLTRA

RE: North Lake Tahoe Marketing Cooperative FYE 2018 Results

Action Requested

Board of Directors' approval of the June 30, 2018 Financial Statements and Independent Accountants' Review Report.

Background

McClintock Accountancy Corporation performed a review of the financial statements of North Lake Tahoe Marketing Cooperative (NLTMC) for the year ending June 30, 2018. As a review, not an audit, they do not express an opinion regarding the financial statements. Based on their review, they were not aware of any material modifications that should be made to the financial statements to be in accordance with accounting principles generally accepted in the United States of America.

NLTMC funding receipts for the year totaled \$2,341,821; \$1,411,821 (60%) was received from North Lake Tahoe Resort Association (County of Placer TOT funding) and \$930,000 (40%) from Incline Village Crystal Bay Visitors Bureau. Expenditures totaling \$2,328,658 were summarized in the McClintock Accountancy report and shown in detail within the accompanying company prepared report. Consumer Marketing expenditures totaled \$1,163,359. Public Relations totaled \$298,974, Leisure Sales totaled \$209,898, Conference Sales totaled \$122,964, Trade Shows totaled \$80,212, Website Content & Maintenance totaled \$60,261 and Committed and Administrative totaled \$392,988. Funding exceeded total expenditures by \$13,163. With the addition of these unspent funds, net assets increased to \$189,433.

Fiscal Impact:

None.

Attachments:

North Lake Tahoe Marketing Cooperative Financial Statements and Independent Accountants' Report June 30, 2018 and company prepared North Lake Tahoe Marketing Cooperative Profit and Loss Budget Performance Report for fiscal year ending June 30, 2018.

NORTH LAKE TAHOE MARKETING COOPERATIVE

A Participant Cooperative Agreement

Between

North Lake Tahoe Resort Association, Inc., California

&

The Lake Tahoe Incline Village Crystal Bay Visitors Bureau, Nevada

FINANCIAL STATEMENTS

AND

INDEPENDENT ACCOUNTANTS' REVIEW REPORT

June 30, 2018

NORTH LAKE TAHOE MARKETING COOPERATIVE

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McCLINTOCK ACCOUNTANCY CORPORATION

ROBERT J. McCLINTOCK, CPA
MICHAEL R. GRIESMER, CPA
ALICE HAHN

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KENDALL GALKA, CPA

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INDEPENDENT ACCOUNTANTS' REVIEW REPORT

To the Officers and Directors of
North Lake Tahoe Marketing Cooperative

We have reviewed the accompanying financial statements of North Lake Tahoe Marketing Cooperative (a participant agreement), which comprise the statement of financial position as of June 30, 2018, and the related statements of activities and changes in net assets and cash flows for the year then ended, and the related notes to the financial statements. A review includes primarily applying analytical procedures to management's financial data and making inquiries of management. A review is substantially less in scope than an audit, the objective of which is the expression of an opinion regarding the financial statements as a whole. Accordingly, we do not express such an opinion.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement whether due to fraud or error.

Accountants' Responsibility

Our responsibility is to conduct the review engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. Those standards require us to perform procedures to obtain limited assurance as a basis for reporting whether we are aware of any material modifications that should be made to the financial statements for them to be in accordance with accounting principles generally accepted in the United States of America. We believe that the results of our procedures provide a reasonable basis for our conclusion.

Accountant's Conclusion

Based on our review, we are not aware of any material modifications that should be made to the accompanying financial statements in order for them to be in accordance with accounting principles generally accepted in the United States of America.

McCLINTOCK ACCOUNTANCY CORPORATION
Tahoe City, California
October 31, 2018

NORTH LAKE TAHOE MARKETING COOPERATIVE

Exhibit A

STATEMENT OF FINANCIAL POSITION

June 30, 2018

(See Independent Accountants' Review Report)

	<u>2018</u>
ASSETS	
Current Assets:	
Cash and cash equivalents	\$ 480,014
Accounts receivable	12,717
Accounts receivable - related party (Note 5)	88,503
Prepaid expenses	<u>6,289</u>
Total Assets (all current)	<u><u>\$ 587,523</u></u>
 LIABILITIES AND NET ASSETS	
 LIABILITIES	
Current Liabilities:	
Accounts payable	<u>\$ 398,090</u>
Total Liabilities (all current)	<u>398,090</u>
 NET ASSETS	
Unrestricted	<u>189,433</u>
Total Net Assets	<u>189,433</u>
Total Liabilities and Net Assets	<u><u>\$ 587,523</u></u>

The accompanying notes are an integral part of these statements.

NORTH LAKE TAHOE MARKETING COOPERATIVE
Exhibit B
STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS
For the Year Ended June 30, 2018

(See Independent Accountants' Review Report)

	<u>2018</u>
CHANGES IN UNRESTRICTED NET ASSETS:	
Increases in Unrestricted Net Assets	
Participant agreement	\$ 2,333,821
LTIVCBVB Entertainment	<u>8,000</u>
Total unrestricted revenue and other support	<u>2,341,821</u>
Decreases in Unrestricted Net Assets	
Public relations	298,974
Leisure sales	209,898
Conference sales	122,965
Trade shows	80,213
Website content/social media	60,261
Committed/admin	392,988
Consumer marketing	<u>1,163,359</u>
Total expenses	<u>2,328,658</u>
Increase in Unrestricted Net Assets	13,163
UNRESTRICTED NET ASSETS	
Beginning of Year	<u>176,270</u>
End of Year	<u><u>\$ 189,433</u></u>

The accompanying notes are an integral part of these statements.

NORTH LAKE TAHOE MARKETING COOPERATIVE

Exhibit C

STATEMENT OF CASH FLOWS

For the Year Ended June 30, 2018

(See Independent Accountants' Review Report)

	<u>2018</u>
CASH FLOWS FROM OPERATING ACTIVITIES	
Increase in unrestricted net assets	\$ 13,163
Reconciliation of change in net assets to cash provided by operating activities	
Changes in operating assets and liabilities:	
Accounts receivable	36,495
Prepaid expenses	17,908
Accounts payable	<u>124,948</u>
Net Cash Provided by Operating Activities	<u>192,514</u>
Net Increase in Cash and Cash Equivalents	192,514
Cash and Cash Equivalents, Beginning of Year	<u>287,500</u>
Cash and Cash Equivalents, End of Year	<u><u>\$ 480,014</u></u>

The accompanying notes are an integral part of these statements.

NORTH LAKE TAHOE MARKETING COOPERATIVE

NOTES TO FINANCIAL STATEMENTS

June 30, 2018

(See Independent Accountants' Review Report)

1. Form of Organization

The North Lake Tahoe Marketing Cooperative (the "Cooperative") is a cooperative agreement established by its participants, North Lake Tahoe Resort Association ("NLTRA") and The Lake Tahoe Incline Village Crystal Bay Visitor Bureau ("LTIVCBVB"), public non-profit corporations that receive Transient Occupancy Tax ("TOT") funds from their respective political jurisdictions for the purposes of marketing the North Lake Tahoe region. The union of the participants is to create the objective of combining funds to market and position the region as one tourism destination through the vehicle of the Cooperative. The agreement of the Cooperative remains in effect until canceled in writing by one of the participants.

A Cooperative Marketing Committee was formed and its elected representatives meet, coordinate and implement the terms and conditions of the marketing cooperative effort. Annual funding contributions are made by each participant on an annual basis.

2. Summary of Significant Accounting Policies

- A. The financial statements of the Cooperative have been prepared on the accrual basis of accounting in which revenue is recognized when earned and expenses are recognized when incurred.
- B. The preparation of financial statements in conformity with U.S. generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.
- C. In order to provide information about liquidity, assets have been sequenced according to their nearness to conversion to cash and liabilities have been sequenced according to the nearness of their maturity and resulting use of cash.
- D. Accounts receivable consists of amounts due from various conference and leisure sales properties that owe amounts based upon an agreement to share in costs of travel and other expenditures. The Cooperative does not charge interest on delinquent receivables. The Cooperative believes substantially all of the accounts receivable balance at June 30, 2018 is collectable. Accordingly, no allowance for doubtful accounts has been provided.
- E. All net asset balances are classified as unrestricted. Net assets are not subject to imposed restriction or restrictions that have expired.
- F. For purposes of the statement of cash flows, the Cooperative considers all cash held within its checking account to be cash equivalents.

NORTH LAKE TAHOE MARKETING COOPERATIVE

NOTES TO FINANCIAL STATEMENTS

June 30, 2018

(See Independent Accountants' Review Report)

G. The carrying amount of financial instruments, including cash, accounts receivable and accounts payable approximates their fair value due to the short term maturities of these instruments.

H. Advertising costs are expensed as incurred.

3. Designated Net Assets

The Cooperative did not designate net assets to any restricted purpose at June 30, 2018.

4. Concentration of Credit Risk

The Association maintains its cash account in bank demand deposits. At June 30, 2018, the aggregate balance of this account exceeded the federally insured (FDIC) limit by \$245,307.

5. Concentration of Revenue

Support from the NLTRA was 60% and support from LTIVCBVB was 40% of the Cooperative's total revenues and support for the year ended June 30, 2018. Each participant agrees annually to contribute a minimum amount based upon a funding formula calculated from year-to-year. At June 30, 2018, \$38,046 was due from NLTRA and \$50,457 was due from LTIVCBVB.

6. Subsequent Events

Subsequent events have been evaluated by management through October 31, 2018 the date that the statements were available for issuance.

12:30 PM

11/05/18

Accrual Basis

North Lake Tahoe Marketing Cooperative

Profit & Loss Budget Performance

July 2017 through June 2018

	Jul '17 - Jun ...	Budget	Jul '17 - Jun ...	YTD Budget	Annual Bud...
Income					
4000-00 · LTIVCBVB Funding	922,000.00	922,000.00	922,000.00	922,000.00	922,000.00
4001-00 · NLTRA Funding	1,411,821.00	1,411,821.00	1,411,821.00	1,411,821.00	1,411,821.00
4004-00 · IVCBVB Entertainment	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00
4005-00 · Prior Year Net Income	0.00	176,270.00	0.00	176,270.00	176,270.00
Total Income	2,341,821.00	2,518,091.00	2,341,821.00	2,518,091.00	2,518,091.00
Gross Profit	2,341,821.00	2,518,091.00	2,341,821.00	2,518,091.00	2,518,091.00
Expense					
5000-00 · CONSUMER MARKETING					
5001-00 · Broadcast / Radio - High Notes	37,351.40	25,000.00	37,351.40	25,000.00	25,000.00
5002-00 · Consumer Print	17,000.00	35,000.00	17,000.00	35,000.00	35,000.00
5002-01 · Native Display	74,752.38	55,004.00	74,752.38	55,004.00	55,004.00
5004-00 · Trip Advisor	79,186.72	75,004.00	79,186.72	75,004.00	75,004.00
5005-00 · Paid Social	148,627.50	135,000.00	148,627.50	135,000.00	135,000.00
5005-01 · Digital Display	134,045.62	116,008.00	134,045.62	116,008.00	116,008.00
5007-00 · Creative Production	85,006.60	141,500.00	85,006.60	141,500.00	141,500.00
5010-00 · Account Strategy & Management	84,000.00	84,000.00	84,000.00	84,000.00	84,000.00
5010-01 · Digital Management & Reporting	36,000.00	36,000.00	36,000.00	36,000.00	36,000.00
5010-02 · Website Strategy & Analysis	24,000.00	24,000.00	24,000.00	24,000.00	24,000.00
5013-00 · Outdoor	116,350.00	95,000.00	116,350.00	95,000.00	95,000.00
5015-00 · Video	37,998.69	38,000.00	37,998.69	38,000.00	38,000.00
5017-00 · Rich Media	20,000.00	40,000.00	20,000.00	40,000.00	40,000.00
5018-00 · Media Commission	106,645.79	93,603.00	106,645.79	93,603.00	93,603.00
5018-01 · Digital Ad Serving	5,506.64	9,000.00	5,506.64	9,000.00	9,000.00
5018-03 · Strategic Marketing Plan	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00
5019-00 · Experiential	58,910.21	82,000.00	58,910.21	82,000.00	82,000.00
5020-00 · Search Engine Marketing	50,772.36	45,004.00	50,772.36	45,004.00	45,004.00
5022-00 · Email	43,285.55	36,000.00	43,285.55	36,000.00	36,000.00
5023-00 · Additional Opportunities	419.48	60,000.00	419.48	60,000.00	60,000.00
Total 5000-00 · CONSUMER MARKETING	1,163,358.94	1,228,623.00	1,163,358.94	1,228,623.00	1,228,623.00
5110-00 · LEISURE SALES					
5107-00 · Creative Production	7,756.25	8,500.00	7,756.25	8,500.00	8,500.00
5111-00 · FAMs - Domestic	2,000.00	2,215.00	2,000.00	2,215.00	2,215.00
5112-00 · Training / Sales Calls	4,049.21	5,000.00	4,049.21	5,000.00	5,000.00
5113-00 · Additional Opportunities	8,755.78	6,000.00	8,755.78	6,000.00	6,000.00
5115-00 · Travel Agent Incentive Program	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
5116-00 · RSA Membership	695.00	695.00	695.00	695.00	695.00
5120-00 · Domestic - Trade Shows	3,844.15	4,500.00	3,844.15	4,500.00	4,500.00
5131-00 · FAMS -Intl - Travel Trade	3,659.87	7,000.00	3,659.87	7,000.00	7,000.00
5132-00 · FAMS -Intl - Media	2,286.15	7,250.00	2,286.15	7,250.00	7,250.00
5133-00 · Ski-Tops	3,265.87	4,500.00	3,265.87	4,500.00	4,500.00
5134-00 · Intl Marketing - Additional Opp	13,681.50	13,000.00	13,681.50	13,000.00	13,000.00
5135-00 · North American Journeys/Tour Op	1,950.00	2,000.00	1,950.00	2,000.00	2,000.00
5136-00 · Tour Operator Brochure Support	5,500.00	6,500.00	5,500.00	6,500.00	6,500.00
5137-00 · Co-op Opportunities	12,511.23	12,000.00	12,511.23	12,000.00	12,000.00
5141-00 · Australian Sales Mission	11,522.95	10,000.00	11,522.95	10,000.00	10,000.00
5142-00 · UK Sales Mission	2,867.39	4,750.00	2,867.39	4,750.00	4,750.00
5143-00 · Mountain Travel Symposium	7,891.54	8,000.00	7,891.54	8,000.00	8,000.00
5144-00 · IPW - POW WOW	10,602.25	11,000.00	10,602.25	11,000.00	11,000.00
5145-00 · TIA Annual Dues	2,550.00	2,500.00	2,550.00	2,500.00	2,500.00
5146-00 · UK / Black Diamond	46,238.45	45,000.00	46,238.45	45,000.00	45,000.00
5147-00 · AUS / Gate 7	25,906.12	35,000.00	25,906.12	35,000.00	35,000.00
5149-00 · Mexico Program	13,428.39	14,000.00	13,428.39	14,000.00	14,000.00
5150-00 · China Program	10,537.57	12,000.00	10,537.57	12,000.00	12,000.00
5151-00 · RTO West	3,006.22	2,695.00	3,006.22	2,695.00	2,695.00
5152-00 · Go West	4,367.19	5,395.00	4,367.19	5,395.00	5,395.00
5154-00 · Canada	25.40	0.00	25.40	0.00	0.00
Total 5110-00 · LEISURE SALES	209,898.48	230,500.00	209,898.48	230,500.00	230,500.00
5200-00 · PUBLIC RELATIONS					
5200-01 · Strategy, Reporting, Mgmt, Etc.	24,000.00	24,000.00	24,000.00	24,000.00	24,000.00
5201-00 · National, Regional, & Local PR	60,000.00	60,000.00	60,000.00	60,000.00	60,000.00

12:30 PM

11/05/18

Accrual Basis

North Lake Tahoe Marketing Cooperative

Profit & Loss Budget Performance

July 2017 through June 2018

	Jul '17 - Jun ...	Budget	Jul '17 - Jun ...	YTD Budget	Annual Bud...
5202-00 · PR Program/ Content Dev - Blogs	21,600.00	21,600.00	21,600.00	21,600.00	21,600.00
5203-00 · International Public Relations	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00
5204-00 · Media Mission(s)	11,537.07	12,600.00	11,537.07	12,600.00	12,600.00
5206-00 · Digital Buy/ Social Media Boost	6,000.00	6,000.00	6,000.00	6,000.00	6,000.00
5207-00 · Content Campaigns/Tools-My Emma	3,645.00	3,732.00	3,645.00	3,732.00	3,732.00
5208-00 · International Travel Media FAMS	13,085.12	20,000.00	13,085.12	20,000.00	20,000.00
5209-00 · Domestic Travel Media FAMS	20,956.95	28,000.00	20,956.95	28,000.00	28,000.00
5210-00 · Content Dev - Newsletters	24,000.00	24,000.00	24,000.00	24,000.00	24,000.00
5211-00 · Social Media Strategy & Mgmt	49,100.00	48,000.00	49,100.00	48,000.00	48,000.00
5212-00 · Social Giveaways & Contests	10,100.00	8,900.00	10,100.00	8,900.00	8,900.00
5213-00 · Facebook Live	6,000.00	6,480.00	6,000.00	6,480.00	6,480.00
5214-00 · Social Takeover	13,550.00	3,300.00	13,550.00	3,300.00	3,300.00
5215-00 · Content Campaign-Local Luminary	17,400.00	17,400.00	17,400.00	17,400.00	17,400.00
Total 5200-00 · PUBLIC RELATIONS	298,974.14	302,012.00	298,974.14	302,012.00	302,012.00
6000-00 · CONFERENCE SALES					
6002-00 · Destination Print	19,971.25	22,000.00	19,971.25	22,000.00	22,000.00
6003-00 · Geo-Fence Targeting	1,250.40	2,000.00	1,250.40	2,000.00	2,000.00
6004-00 · Email	16,900.00	15,996.00	16,900.00	15,996.00	15,996.00
6005-00 · Paid Media	13,081.01	14,602.00	13,081.01	14,602.00	14,602.00
6006-00 · CVENT	10,400.00	10,400.00	10,400.00	10,400.00	10,400.00
6007-00 · Creative Production	19,857.50	25,000.00	19,857.50	25,000.00	25,000.00
6008-00 · Conference PR / Social Outreach	12,000.00	12,000.00	12,000.00	12,000.00	12,000.00
6010-00 · Collateral Production	7,350.52	23,200.00	7,350.52	23,200.00	23,200.00
6018-00 · MCC Media Commission	8,008.36	6,842.00	8,008.36	6,842.00	6,842.00
6018-01 · MCC Digital Ad Serving	0.00	200.00	0.00	200.00	200.00
6128-00 · HelmsBriscoe Strategic Partner	5,500.00	6,000.00	5,500.00	6,000.00	6,000.00
6152-00 · Client Events / Opportunities	4,629.13	17,920.00	4,629.13	17,920.00	17,920.00
6153-00 · Chicago Sales Rep Support	4,015.40	10,000.00	4,015.40	10,000.00	10,000.00
Total 6000-00 · CONFERENCE SALES	122,963.57	166,160.00	122,963.57	166,160.00	166,160.00
6100-00 · TRADE SHOWS					
6103-00 · MPI - Cascadia	1,500.00		1,500.00		
6111-00 · Site Inspections	5,743.09	6,000.00	5,743.09	6,000.00	6,000.00
6115-00 · Chicago Holiday Showcase	3,565.73	6,200.00	3,565.73	6,200.00	6,200.00
6116-00 · CalSAE Seasonal Spectacular	3,827.99	1,525.00	3,827.99	1,525.00	1,525.00
6120-00 · AFW Client Event	3,315.72	5,000.00	3,315.72	5,000.00	5,000.00
6120-01 · Sac River Cats Client Event	1,001.48	3,000.00	1,001.48	3,000.00	3,000.00
6120-02 · SF Giants Client Event	(101.87)	2,000.00	(101.87)	2,000.00	2,000.00
6120-03 · San Jose Sharks Client Event	0.00	6,500.00	0.00	6,500.00	6,500.00
6127-00 · CalSAE Annual	6,074.14	6,700.00	6,074.14	6,700.00	6,700.00
6136-00 · Mountain Travel Symposium	2,754.68	4,500.00	2,754.68	4,500.00	4,500.00
6143-00 · Connect Marketplace	10,232.26	11,900.00	10,232.26	11,900.00	11,900.00
6144-00 · ASAE XDP	2,983.16	4,000.00	2,983.16	4,000.00	4,000.00
6146-00 · UC Vendor Fair	390.60	555.00	390.60	555.00	555.00
6150-00 · Luxury Meeting Summit MA/CT/NY	2,342.42	6,100.00	2,342.42	6,100.00	6,100.00
6150-01 · Luxury Meeting Summit Northwest	2,065.32	3,300.00	2,065.32	3,300.00	3,300.00
6150-02 · Luxury Summit Meeting Texas	2,967.37	6,100.00	2,967.37	6,100.00	6,100.00
6150-03 · Luxury Meeting Summit NorCal	0.00	3,300.00	0.00	3,300.00	3,300.00
6150-05 · Luxury Meeting Summit PHX/SD/OC	1,458.12	5,200.00	1,458.12	5,200.00	5,200.00
6151-00 · Destination CA	1,227.90	1,500.00	1,227.90	1,500.00	1,500.00
6154-00 · HelmsBriscoe ABC	4,941.73	3,500.00	4,941.73	3,500.00	3,500.00
6156-00 · Connect California	1,512.89	15,000.00	1,512.89	15,000.00	15,000.00
6156-02 · Connect Chicago	3,750.00	3,450.00	3,750.00	3,450.00	3,450.00
6156-03 · Connect New England	6,458.48	5,450.00	6,458.48	5,450.00	5,450.00
6156-04 · Connect Georgia	5,128.84	4,950.00	5,128.84	4,950.00	4,950.00
6157-00 · HPN Partner Conference	3,436.59	5,000.00	3,436.59	5,000.00	5,000.00
6157-01 · HPN Spring Training CE (RSCVA)	0.00	1,500.00	0.00	1,500.00	1,500.00
6157-02 · HPN Partner Conference Post FAM	0.00	5,000.00	0.00	5,000.00	5,000.00
6160-00 · AllThingsMeetings Silicon Valley	1,782.61	2,000.00	1,782.61	2,000.00	2,000.00
6160-01 · AllThingsMeetings East Bay	1,069.10	2,000.00	1,069.10	2,000.00	2,000.00
6160-02 · AllThingsMeetings - SF	784.30		784.30		
Total 6100-00 · TRADE SHOWS	80,212.65	131,230.00	80,212.65	131,230.00	131,230.00
7000-00 · COMMITTED & ADMIN EXPENSES					
5008-00 · Cooperative Programs	51,697.31	51,000.00	51,697.31	51,000.00	51,000.00

12:30 PM

11/05/18

Accrual Basis

North Lake Tahoe Marketing Cooperative

Profit & Loss Budget Performance

July 2017 through June 2018

	Jul '17 - Jun ...	Budget	Jul '17 - Jun ...	YTD Budget	Annual Bud...
5009-00 · Fulfillment / Mail	10,727.42	13,000.00	10,727.42	13,000.00	13,000.00
5021-00 · RASC-Reno Air Service Corp	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00
5122-00 · SSMC Shipping - Sierra Ski Mkt	91,392.11	90,000.00	91,392.11	90,000.00	90,000.00
5123-00 · HSVC - High Sierra Visitors	2,000.00	2,250.00	2,000.00	2,250.00	2,250.00
7001-00 · Miscellaneous	2,260.19	3,000.00	2,260.19	3,000.00	3,000.00
7002-00 · CRM Subscription	10,000.00	10,000.00	10,000.00	10,000.00	10,000.00
7003-00 · IVCBVB Entertainment Fund	6,044.13	8,000.00	6,044.13	8,000.00	8,000.00
7004-00 · Research	27,795.03	20,000.00	27,795.03	20,000.00	20,000.00
7005-00 · Film Festival	15,000.00	15,000.00	15,000.00	15,000.00	15,000.00
7006-00 · Special Events	35,000.00	30,000.00	35,000.00	30,000.00	30,000.00
7007-00 · Destimetrics / DMX	31,204.00	26,250.00	31,204.00	26,250.00	26,250.00
7008-00 · Opportunistic Funds	5,487.25	26,066.00	5,487.25	26,066.00	26,066.00
8700-00 · Automobile Expense*	4,380.52	0.00	4,380.52	0.00	0.00
Total 7000-00 · COMMITTED & ADMIN EXPENSES	392,987.96	394,566.00	392,987.96	394,566.00	394,566.00
8000-00 · WEBSITE CONTENT & MAINTENANCE					
8002-00 · Content Manager Contractor	42,999.96	45,000.00	42,999.96	45,000.00	45,000.00
8003-00 · Website Hosting Maintenance	17,260.99	20,000.00	17,260.99	20,000.00	20,000.00
Total 8000-00 · WEBSITE CONTENT & MAINTENANCE	60,260.95	65,000.00	60,260.95	65,000.00	65,000.00
Total Expense	2,328,656.69	2,518,091.00	2,328,656.69	2,518,091.00	2,518,091.00
Net Income	13,164.31	0.00	13,164.31	0.00	0.00



north lake tahoe

Advertising Effectiveness & ROI

August 2018

Insights

- The North Lake Tahoe paid marketing campaign influenced nearly \$154 million in visitor spending in the 2017-18 fiscal year, for a return on investment of \$182 for every \$1 spent on paid media.
- With a modest budget targeting a handful of major U.S. markets, the campaign's success is attributable to the number of households reached. The campaign was very efficient when compared to the average for destinations across the country.

84,101

Influenced
trips

\$153.8 million

Influenced
visitor
spending

\$182

Return on
investment

- North Lake Tahoe is well positioned among the competitive set, especially for its variety of product and year-round appeal. Most of the competitors are known primarily as a warm weather or cold weather destinations. North Lake Tahoe's unique position is its superior product in both summer and winter. However, within each season there is strong competition.
- As North Lake Tahoe looks to position the destination, messaging should focus on the area's Strengths to Promote such as scenery, weather and the outdoors. However, the destination's position could be improved by including messaging related to the Opportunities to Improve such as value, family activities and accessibility.
- Additionally, current marketing is reaching a far less affluent audience than actually visits North Lake Tahoe. Future media placements should focus on a higher value traveler.
- And finally, to improve the overlap between brand and tactical executions, there could be fewer components of the campaign. Namely, resources allocated to radio would be redistributed to existing media. SMARInsights finds this medium is best suited to event-based messaging.



north lake tahoe

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 marketing designed to promote visitation throughout the fiscal year.
- A paid marketing campaign was placed in select markets between July 2017 and June 2018, using video, print, digital, out-of-home and radio ads as well as direct e-mail marketing.
- To measure the effectiveness of the media placements, the Co-op partnered with Strategic Marketing & Research Insights (SMARInsights). Through consumer surveying, we see the impacts of the campaign on both the image of the area and travel. The research is designed to calculate an economic impact and ROI of the leisure marketing investment.
- The following report:
 - Measures the ability of the advertising to reach the target audience and generate recall;
 - Quantifies efficiency of the media buy through the cost to reach an aware household;
 - Forwards performance measures to assess the effectiveness of the creative in meeting its various communication goals;
 - Determines the strength of the campaign in terms of spurring consumer actions, having a positive impact on perceptions, and increasing likelihood to visit;
 - Calculates the number of influenced trips, visitor spending, and return on investment of the media campaign; and
 - Assesses the relative effectiveness of various elements of the campaign to help refine future efforts.

Methodology

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

Campaign Overview

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

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

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





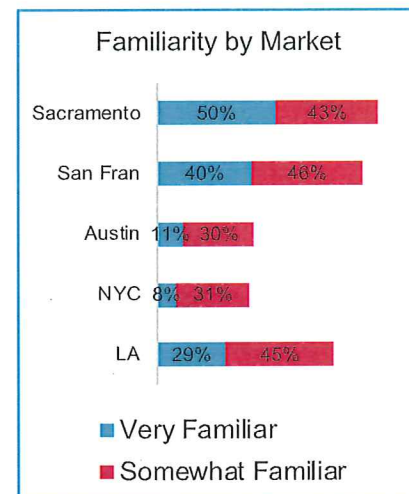
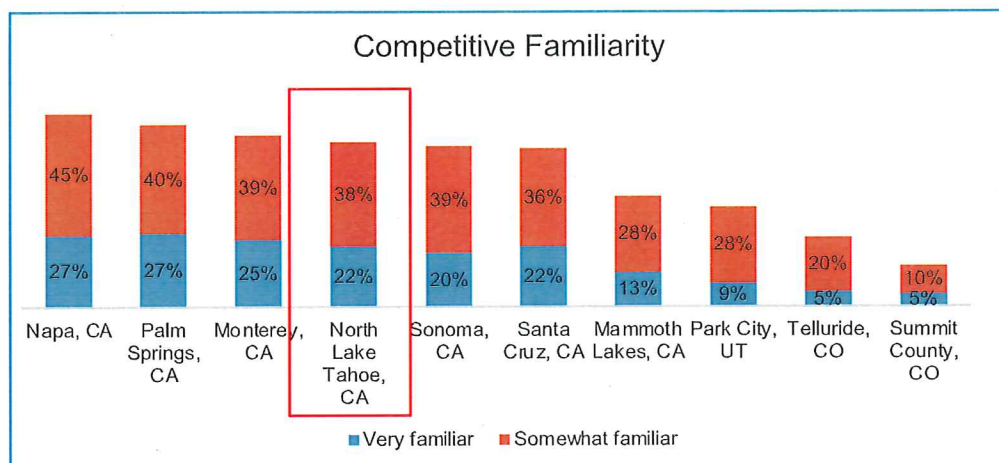
north lake tahoe

Advertising Effectiveness & ROI

COMPETITIVE POSITION

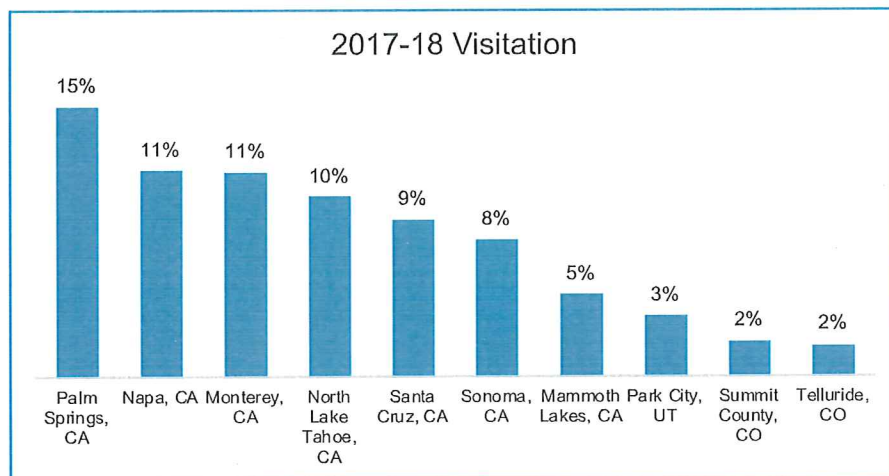
North Lake Tahoe has more familiarity than other snow destinations but is in the middle of the pack for warmer-weather communities.

- North Lake Tahoe's competitive set includes not only other communities best known as ski areas but also destinations with warmer climates. Consumers have considerably more familiarity with the warmer-weather destinations.
- North Lake Tahoe outpaces the competitive set that includes ski destinations but consumers are more familiar with other California destinations, including Napa, Palm Springs and Monterey. Familiarity varies by market – with strong familiarity in the nearby markets of Sacramento and San Francisco.

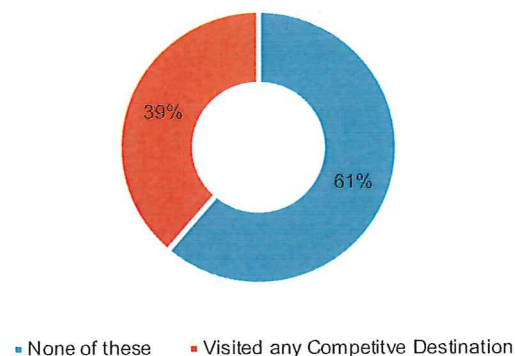


Visitation is reflective of familiarity, but less than half of consumers visit *any* of the competitive set throughout a single year.

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



Competitive Set Visitation



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

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

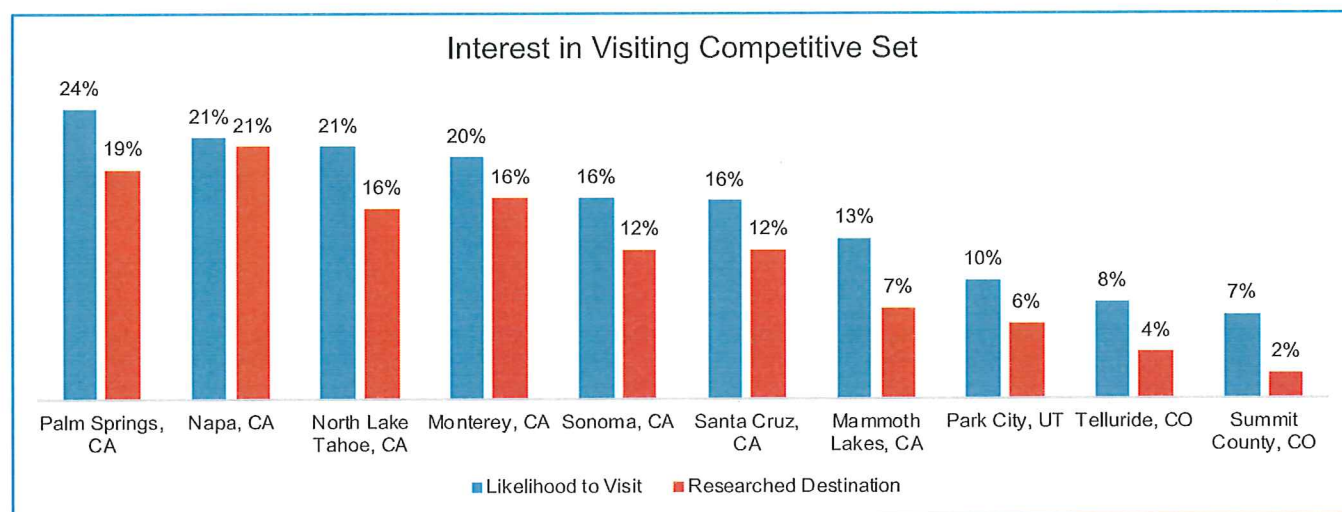


Image of North Lake Tahoe

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

Strengths = Ratings > 3.7

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

Opportunities = Ratings 3.7 <> 3.5

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

Weaknesses = Ratings <3.5

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

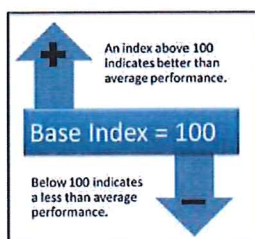
Product Position

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

Performance Measures

- Above average performance
- Average performance
- Below average performance




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



Summer Product Position

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

Performance Measures

-  Above average performance
-  Average performance
-  Below average performance

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

Winter Product Position

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

Performance Measures

- Above average performance
- Average performance
- Below average performance

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



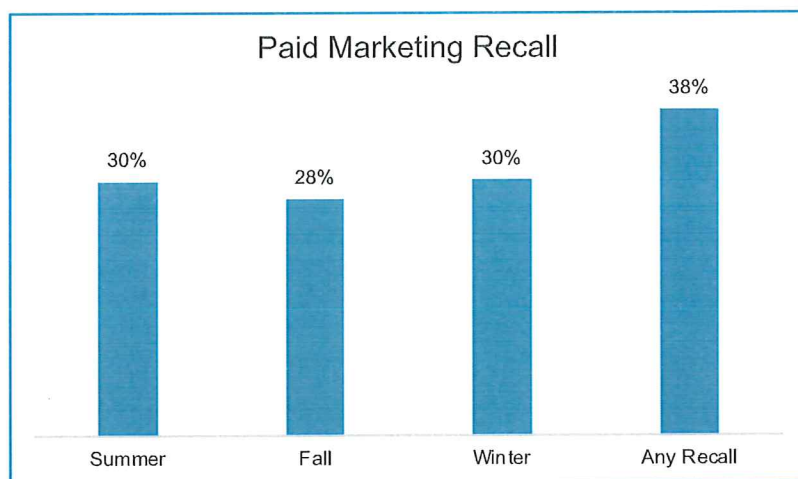
north lake tahoe

Advertising Effectiveness & ROI

MARKETING RECALL

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

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

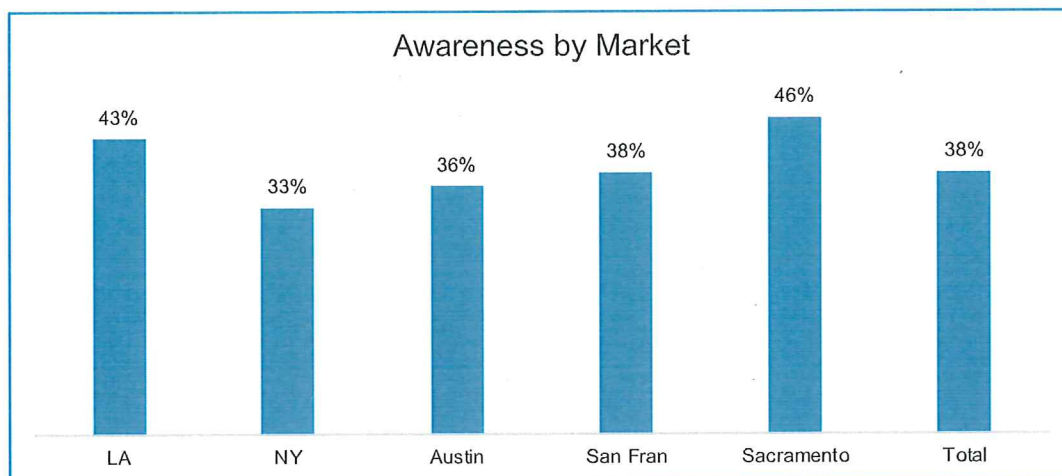


Cost per Aware HH	2017-18
Targeted HHs	13,971,616
Recall	38%
Households with Recall	5,297,031
Media Spending	\$845,857
Cost per Aware HH	\$0.16



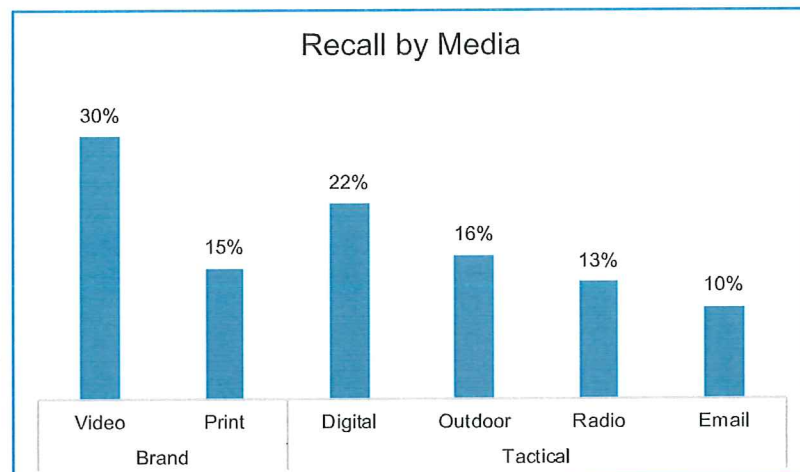
Recall does vary by market ranging from the lowest in New York, to the highest in Sacramento.

- Overall the recall of the campaign is 38%, but it differs in the various geographic markets. It is highest in Sacramento, followed by LA. It is lower in the more distant markets, especially New York.



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

- While all destination marketing efforts are designed to drive visitation, they do so in different ways. SMARInsights sees video and print executions as the best options for building a brand, while other forms of media used by North Lake Tahoe are better at delivering tactical messages.
- Video executions delivered on a digital platform are still considered brand-building media. And with the highest recall and minimal investment, video is one of the most efficient media at generating recall. SMARInsights has seen that video creates a stronger impression and therefore is noticed more and tends to have stronger recall.
- Most of the North Lake Tahoe investment is in other forms of digital advertising. And while this has the highest cost per aware household, it is still considered quite efficient, and all the media have a cost per aware household well below the benchmark of \$0.67.

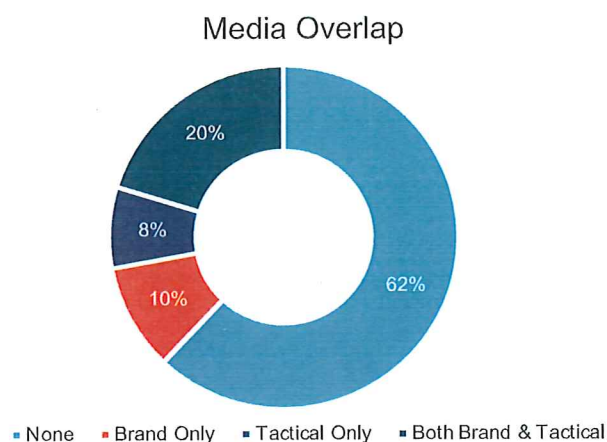
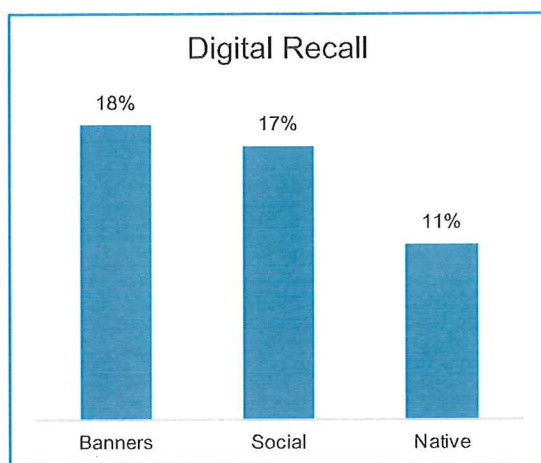


Cost per Aware HH	Video	Print*	Digital	Outdoor*	Radio	E-mail
Targeted HHs	13,971,616	4,381,464	13,971,616	6,371,936	13,971,616	13,971,616
Recall	30%	15%	22%	16%	13%	10%
Households with Recall	4,139,829	648,217	3,077,039	1,031,708	1,838,489	1,456,369
Media Spending	\$82,425	\$17,000	\$564,203	\$110,093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

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

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

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





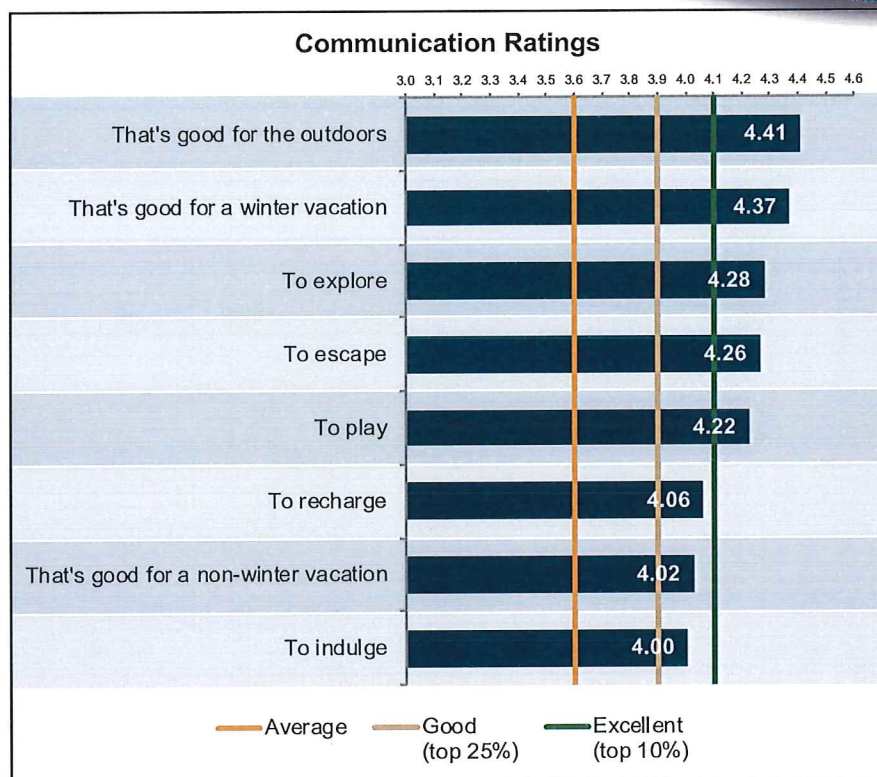
north lake tahoe

Advertising Effectiveness & ROI

CREATIVE EVALUATION

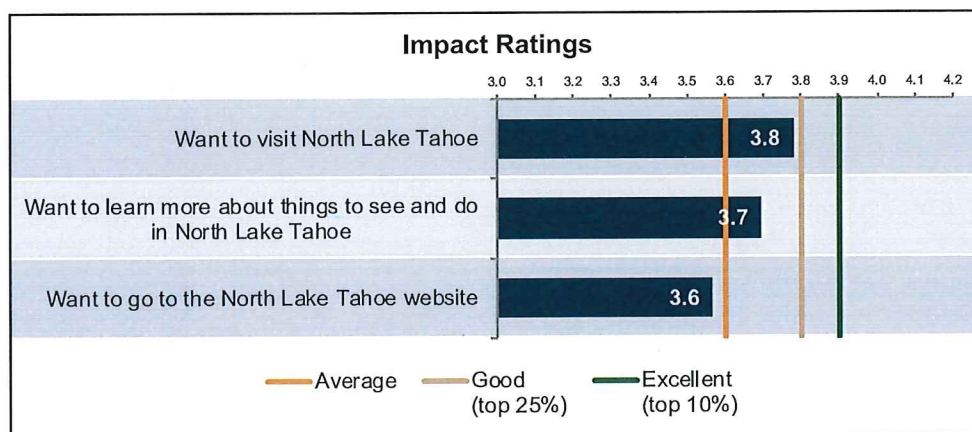
The campaign receives excellent ratings, rarely seen for local DMOs.

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



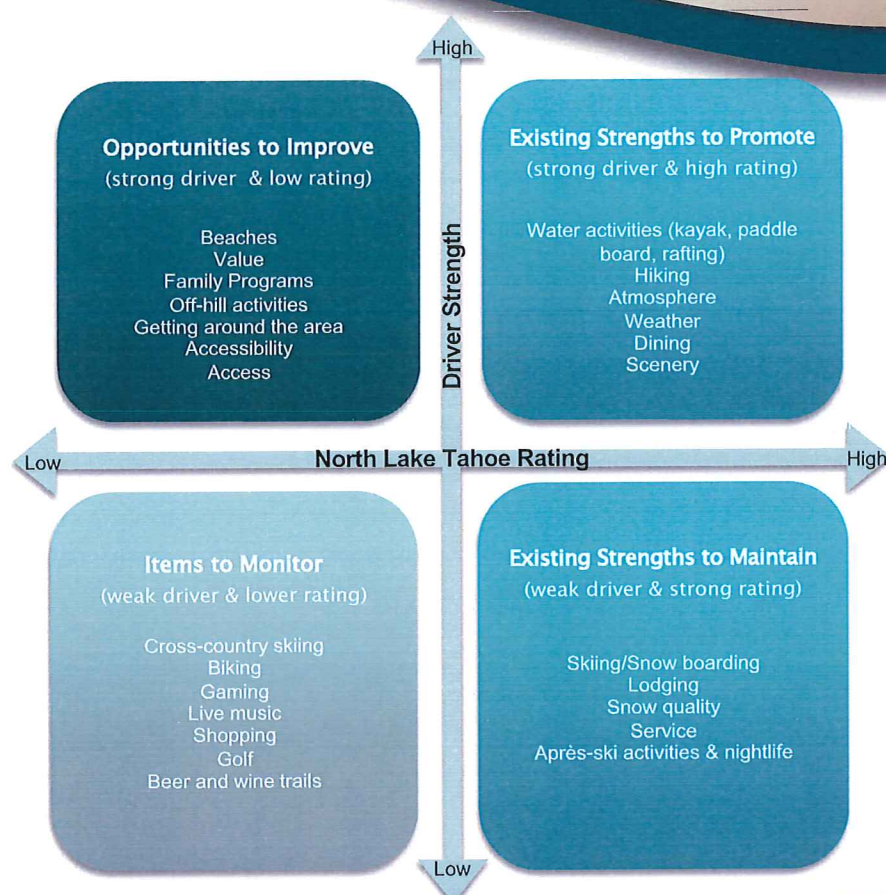
The creative isn't as strong at "closing the sale" with impacting consumers to visit or learn more about North Lake Tahoe.

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



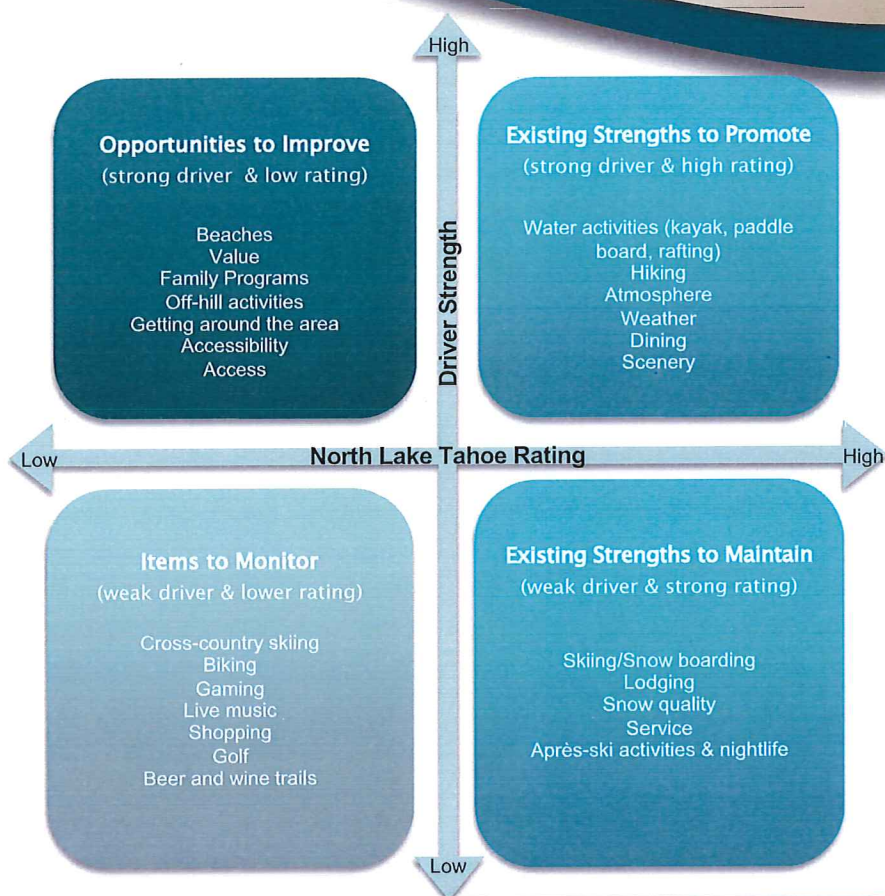
Creative Messaging

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



Creative Messaging

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





north lake tahoe

Advertising Effectiveness & ROI

MARKETING IMPACT

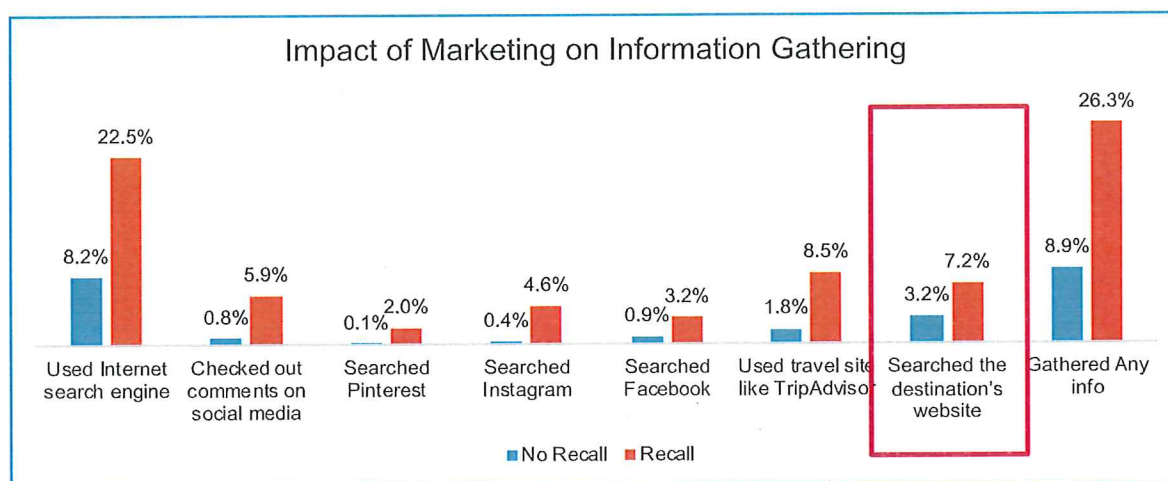
The campaign improves the image of the area, especially on important attributes.

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

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

Impact on Information Gathering

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

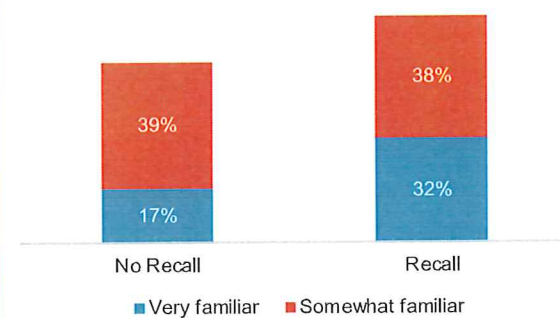


Visitors who were aware the marketing stayed longer, did more and spent more.

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

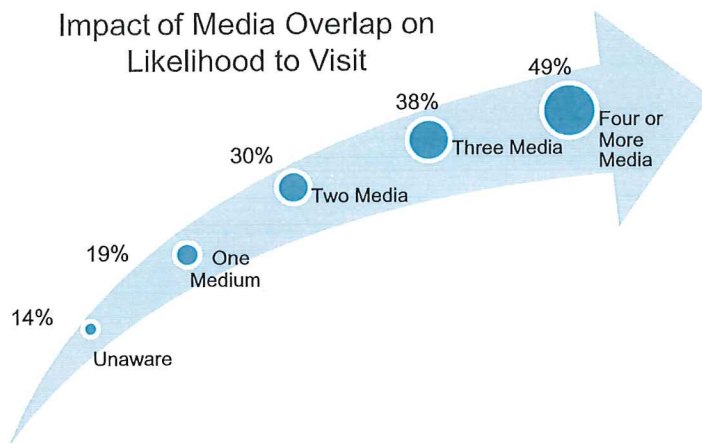
Trip specifics	Unaware	Ad-Aware
Number of nights	2.9	3.3
Number of activities	1.7	2.5
Trip spending	\$1,321	\$1,829

Impact of Paid Marketing on North Lake Tahoe Familiarity

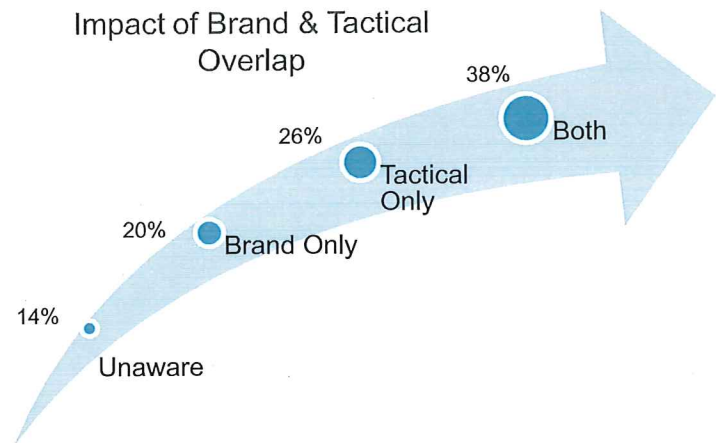


Interest in visiting increases as consumers are exposed to multiple elements of the campaign.

Impact of Media Overlap on Likelihood to Visit



Impact of Brand & Tactical Overlap



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



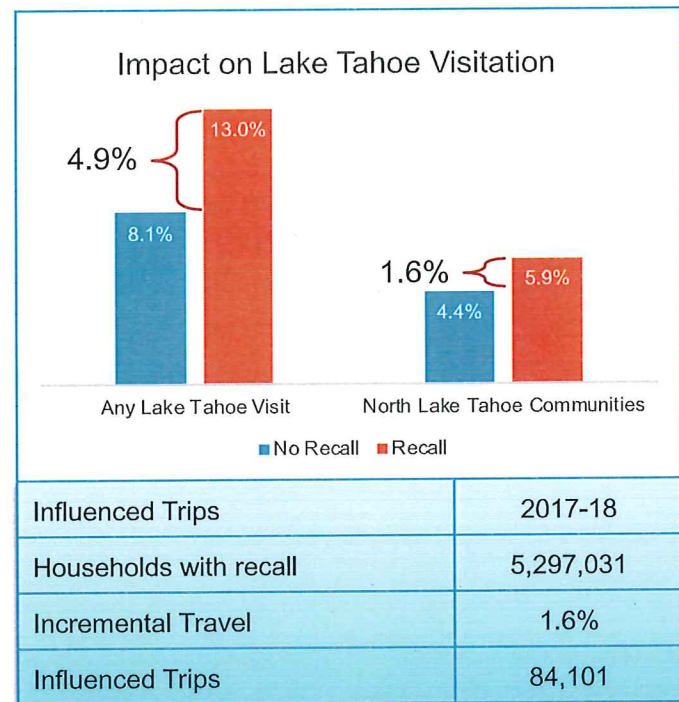
The methodology for determining influence in the industry standard for destinations.

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



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

- Overall the effort generated over 250,000 trips to Lake Tahoe. A challenge for North Lake Tahoe is that consumers do not make a distinction between north and south but likely hear and read both as all Lake Tahoe. For this reason, there is considerably less visitation when consumers are asked about specific communities they visited.
- The paid media had nearly a 5% impact on overall travel to Lake Tahoe. However, when only North Lake Tahoe communities are considered, the rate of travel is far smaller. While other parts of the local community benefit from North Lake Tahoe's investment, the inverse is likely true as well. It's likely North Lake Tahoe is benefitting from investment made by Tahoe South and even individual lodging properties.
- Given the rate of influence on travel to North Lake Tahoe, the paid marketing generated more than 84,000 trips over the course of the 2017-18 fiscal year.



The campaign influenced more than 247,000 additional room nights and generated \$14.2 million in taxes.

- More than 247,000 room nights are attributable to the fiscal year's marketing campaign based on the rate of visitors using paid lodging and the number of nights they spent on their trips.
- The use of paid lodging is significantly higher for North Lake Tahoe than other destinations. More than 40% of trips often are for visiting friends and relatives, but VFR is minimal for North Lake Tahoe.
- The marketing campaign generated more than \$14.2 million in sales and lodging taxes to the municipalities served by North Lake Tahoe. Of this, \$2.6 million was generated for the Transient Occupancy Tax (TOT) from lodging.

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

	California	Nevada	Total
Sales Tax			
% of overnights	71.2%	28.8%	100%
Visitor spending	\$109,558,578	\$44,262,062.62	\$153,820,641
State and local sales tax	7.250%	8.265%	6.830%
State and local sales tax	\$7,942,997	\$3,658,259	\$11,601,256
Lodging Tax			
Average lodging spend*	\$288*		
Share of overnight trips	59,901	24,200	84,101
Lodging spending	\$17,251,433	\$6,969,641	\$24,221,074
Lodging Tax	\$1,725,143	\$906,053	\$2,631,197
Total taxes generated	\$9,668,140	\$4,564,313	\$14,232,453

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

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

- Given the trip spending by aware visitors, influenced trips resulted in \$153 million in economic impact to the community. This is spending that would not have occurred without the marketing campaign, returning \$182 in influenced visitor spending for every \$1 the DMO invested.
- This is considerably higher than the \$59 average SMARInsights sees for local DMOS. However, SMARInsights is often measuring a single seasonal campaign. One reason for the strength is that North Lake Tahoe's evaluation is for an entire fiscal year, however, the higher return on investment is also attributable to both the strength of the creative as well as an efficient media buy.
- Another helpful measure is the Room Tax ROI – this shows that for every \$1 in marketing the campaign returned \$3.11 in room tax.

	2017-18
Incremental trips	84,101
Visitor spending	\$1,829
Economic impact	\$153,820,641
Lodging Tax	\$2,631,197
CVB expenditures	\$845,857
ROI	\$182
Room Tax ROI	\$3.11



north lake tahoe

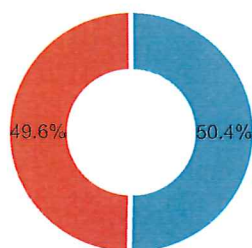
Advertising Effectiveness & ROI

TRIP SPECIFICS

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

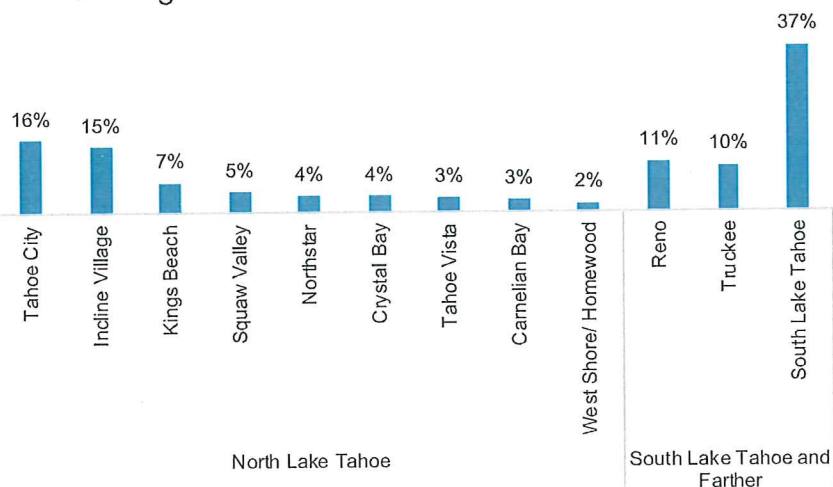
- Consumers do not make a distinction when traveling to the Lake Tahoe area if they are staying in North Lake Tahoe or South Lake Tahoe. Although all visitors indicated they overnighted in North Lake Tahoe, when asked about individual communities where they stayed, only half actually overnighted in North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

Overnight Distribution of North Lake Tahoe Visitors



■ No Overnight North Lake Tahoe ■ Overnight North Lake Tahoe

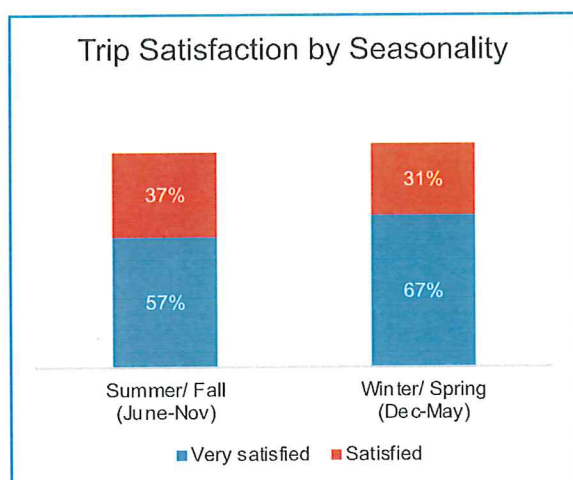
Overnight Distribution of North Lake Tahoe Visitors



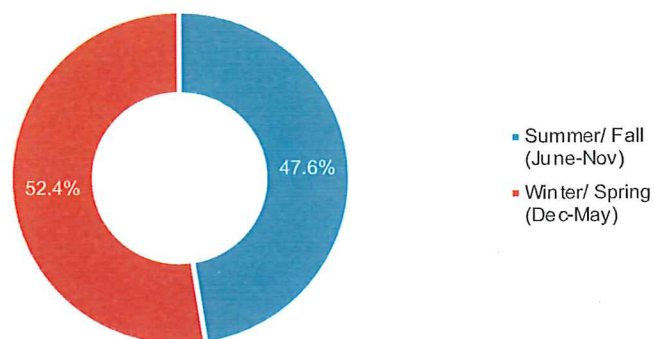
North Lake Tahoe sees nearly equal distribution in seasonal visitation – staking its unique position within the competitive set.

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

Trip Satisfaction by Seasonality



Seasonal Distribution of North Lake Tahoe Visitors



Summer Trip Activities

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

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

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



Summer Marketing Targets

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



Winter Trip Activities

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

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



Winter Marketing Targets

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



Visitor Demographics

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



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



north lake tahoe

Advertising Effectiveness & ROI

QUESTIONNAIRE

Questionnaire

North Lake Tahoe 2017-18 Ad Effectiveness Research
June 2018

ZIP. What is your ZIP code? _____

S1. Who in your household is primarily responsible for making decisions concerning travel destinations?

- Me
- Me and my spouse/partner
- My spouse/partner/other → TERMINATE AT END OF SCREENERS

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

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

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

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

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

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

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

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Palm Springs, CA	
Monterey, CA	
None of these (ANCHOR)	

SHOW THE DESTINATIONS THAT THEY GATHERED INFORMATION ABOUT FROM Q2.

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

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

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

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

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

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

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Questionnaire

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

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

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

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

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

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

ASK Q8 - Q19 IF VISITED NORTHLAKE TAHOE AT Q3. ELSE SKIP TO AD SECTION.

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

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

IF VISITED MULTIPLE TIMES FROM Q4, SAY:

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

ASK Q9 IF VISITED MULTIPLE TIMES FROM Q4.

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

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

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Questionnaire

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

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

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

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

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

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

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

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

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

ASK Q15 IF Q14 >1

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

ASK Q16 IF Q13 >0

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

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

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

<input type="checkbox"/> Tahoe City
<input type="checkbox"/> Kings Beach
<input type="checkbox"/> Carnelian Bay
<input type="checkbox"/> Tahoe Vista
<input type="checkbox"/> Incline Village
<input type="checkbox"/> Crystal Bay
<input type="checkbox"/> West Shore/Homewood
<input type="checkbox"/> Squaw Valley
<input type="checkbox"/> Northstar

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Questionnaire

Reno
Truckee
South Lake Tahoe
Other

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

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

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

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

ASK Q19 IF Q18 < 3.

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

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

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

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

- ☐ Yes
- ☐ No

IF Q18 = YES, ASK Q19

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

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

ADVERTISING AWARENESS AND RATINGS SECTION

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

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

ROTATE VIDEO



NLT Spartan Spot 2017 v5a.mp4
<https://youtu.be/Nfy3XKz7EuA>



North Lake Tahoe - World Cup Spot.mp4
<https://youtu.be/1iFVind22ZU>



North Lake Tahoe Winter Spot (TV SAFE).mp4
<https://youtu.be/a3Vouu8b0aI>

20. Have you seen this video ad before?

- ☐ Yes
- ☐ No

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Questionnaire

PRINT – SOUTHERN CALIFORNIA ONLY


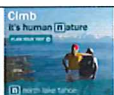



NLT_SunsetPrintAd_FullPage_v2.jpg

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

DIGITAL

SHOW ON ONE PAGE FALL

Connect  <small>It's human. It's nature. Connect.</small> <small>(B) North Lake Tahoe</small> 01_300x250_FallDigi_Family_1.jpg	Climb  <small>It's human. It's nature. Climb.</small> <small>(B) North Lake Tahoe</small> 01_300x250_Millennial_1.jpg
Explore  <small>It's human. It's nature. Explore.</small> <small>(B) North Lake Tahoe</small> 01_300x250_Workaholic_1.jpg	





Winter Banners

Connect  <small>It's human. It's nature. Connect.</small> <small>(B) North Lake Tahoe</small> NLT_Boomer_300x250.html	Learn  <small>It's human. It's nature. Learn.</small> <small>(B) North Lake Tahoe</small> NLT_Family_300x250.html	Escape  <small>It's human. It's nature. Escape.</small> <small>(B) North Lake Tahoe</small> NLT_Millennial_300x250.html
--	--	--

Strategic Marketing & Research Insights

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Spring Banners

Smile  <small>It's human. It's nature. Smile.</small> <small>(B) North Lake Tahoe</small> 300x250_SpringDigi_Fam_1.jpg	Travel  <small>It's human. It's nature. Travel.</small> <small>(B) North Lake Tahoe</small> 300x250_SpringDigi_General_1.jpg
Explore  <small>It's human. It's nature. Explore.</small> <small>(B) North Lake Tahoe</small> 300x250_SpringDigi_Outdoor_1.jpg	Breathe  <small>It's human. It's nature. Breathe.</small> <small>(B) North Lake Tahoe</small> 300x250_SpringDigi_Workaholics_1.jpg

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

PAID SOCIAL

 Spring Social	 Fall Social1
 Fall Social2	 Winter Social

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

Strategic Marketing & Research Insights

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Questionnaire

NATIVE SOCIAL

Summer



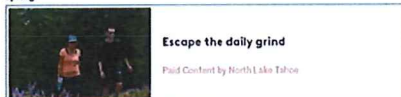
Summer Native.jpg

Winter



Winter Native.jpg

Spring



Spring Native.JPG

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

OUTDOOR

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



NLT_DigitalBillboards_v2-1.jpg



NLT_DigitalBillboards_v2-3.jpg



NLT_DigitalBillboards_v3-1.jpg



NLT_DigitalBillboards_v3-2.jpg

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

RADIO

JAN18-REV.mp3

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

Questionnaire

Email Blast

eBlasts - Fall



LeisureEblast_Sept_1.jpg

eBlasts - Winter



LeisureEblast_Jan03_1.jpg

eBlasts - Spring



NLT_AprConsumerEblast_v1.jpg

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

- 1. Yes
- 0. No

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

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

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

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

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

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

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

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Questionnaire

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

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

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

D1. Are you...?

1. Male
2. Female

D2. What is your annual household income range?

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

D3. Are you currently?

1. Married
2. Single

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

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

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

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

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

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

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North Lake Tahoe Marketing 2018/2019 Winter Preview

 north lake tahoe

Summer Campaign Recap

- **Geographic Targets**

- Los Angeles
- New York
- Austin

- **Media Spend and Total Impressions**

- \$167,597 total summer spend
- 22,527,004 Impressions
- 739 Book Now Conversions
- \$14.15 Cost per Conversion

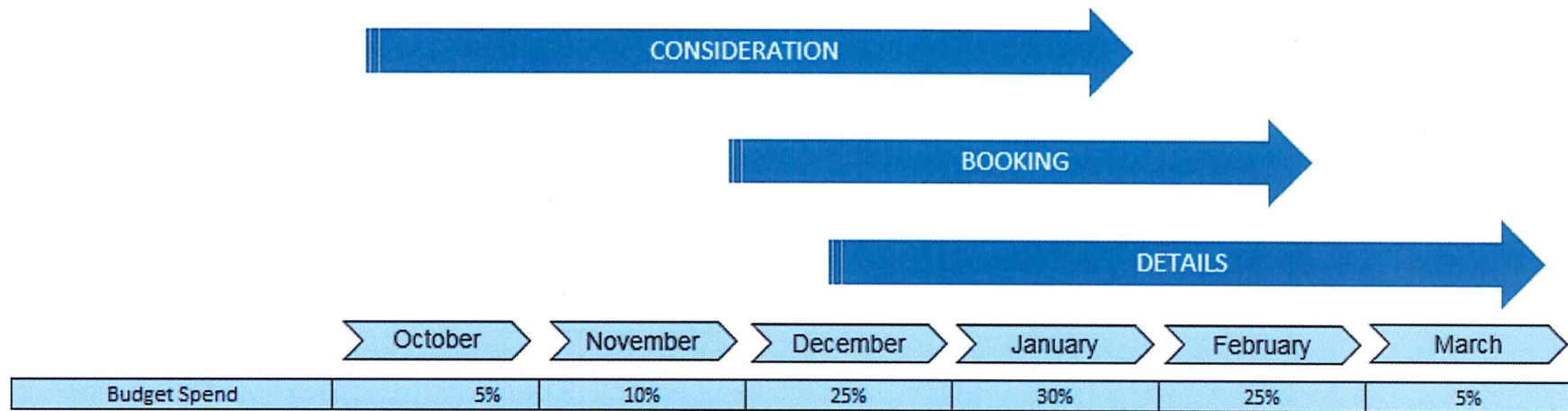
- Digital ads directed over 40k user to GoTahoeNorth.com - an increase of 128% from 2017!
- Display ads targeted toward older, experienced travelers were the most effective, driving clicks at the highest rate and conversions at the lowest cost.
- Ads served to users in New York generally outperformed other target markets, especially among the younger and family target
- Facebook Ads drove 120 Book Now conversions and generated 2.4mm impressions

| Target Markets and Media Mix



 north lake tahoe

Consumer Journey - Winter



Consumer Journey | Winter 2018-2019

Target Markets, Spend, Media Mix

- **Geographic Targets**

- Los Angeles
- New York
- San Diego*

- **Media Spend and Total Impressions**

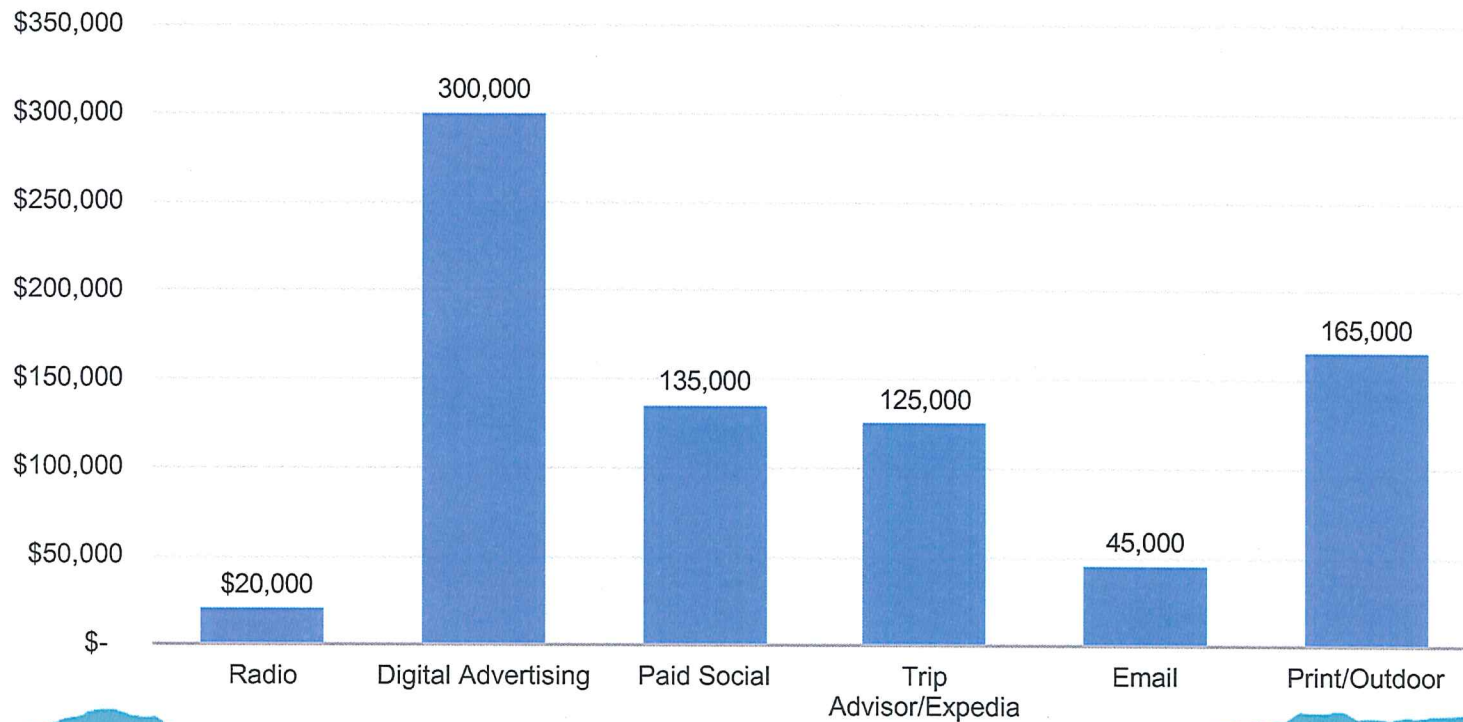
- \$395,597 total winter spend
- 26,000,000 total estimated impressions

- Year-round media spend will continue this winter, including SEM, retargeting display and video, and social media retargeting

- The Winter campaign will also include a mix of:

- Native advertising
- Programmatic display
- Video
- Rich media
- Social media conquering

18/19 Media Mix Spend Breakout



**Total Media
Spend: \$760,000**

**Total
Impressions:
74mm**

| PR, Social and Content

 north lake tahoe

Winter Themes

Shopping

High Altitude Holidays

Family and Multi-Generational

Learn to Ski and Ride

Romance in Tahoe

Winter Wellness + Health

Luxury Experiences

PR - Winter Preview

Winter Tactics

- **Post Winter Press Release on PRWeb** - for increased visibility in target markets
- **Develop an Ambassador Program** with lodging, resort and coop partners who can send real-time photos and videos when it snows— AND host media last-minute in crisis situations
- **Develop a Crisis Comms Plan** to prepare for all situations regarding weather, traffic, etc.
- **Increase media relations outreach** to direct fly markets (i.e. Austin, Portland, Seattle, Denver, NYC, So-Cal)

Social + Content - Winter Preview

Winter Goal

Provide real-time look into conditions and experiences in North Lake Tahoe; highlight all resort partners effectively; create a robust view of winter activities to promote North Lake Tahoe no matter the conditions.



The Abbi Agency | Winter Overview

A scenic landscape photograph of a forested valley at sunset or sunrise. The sky is a mix of orange, yellow, and purple. The valley is filled with dense evergreen trees, and a few taller trees stand out in the foreground. A semi-transparent white box with rounded corners is centered over the image, containing the text "Thank you!" in a bold, dark blue font.

Thank you!