



August 2016

Marketing Standing  
Reports

## DESTINATION LEVEL RESERVATIONS ACTIVITY SUMMARY

Produced by DestiMetrics, LLC. Presented as a community service by the North Lake Tahoe DestiMetrics subscribing organization



**north lake tahoe**  
Chamber | CVB | Resort Association

Destination: North Lake Tahoe

Period: Bookings as of Jul 31, 2016

### Executive Summary - Year over Year Variance and Analysis

Data based on a sample of up to 11 properties in the North Lake Tahoe destination, representing up to 1,522 Units ('DestiMetrics Census'\*) and 47.1% of 3,229 total units in the North Lake Tahoe destination ('Destination Census'\*\*)

**MARKET OVERVIEW:** Domestic markets were more than a little resilient in their response to the UK's vote in June to leave the European Union. Though there will be long-term consequences at home and abroad, for the time being Wall Street is feeling confident, with the Dow Jones gaining sharply during the month. The mood of investors was set in large part by employers, who added a very strong 285,000 jobs during the month, and unemployment remained unchanged as many discouraged workers returned to the booming job market. Both the job and financial markets kept consumers afloat as consumer confidence remained all-but unchanged, declining 0.1 points. None of this buoyancy is lost on the travel market, where guests continue to push summer performance to new record levels in both occupancy and rate. Based on an aggregate data from all DestiMetrics destinations, occupancy for July was up 5.0 percent versus the same time last year, while rate was also up 6.3 percent for the month. Bookings taken in July for arrival in July were down -8.7 percent (not shown). Locally, North Lake Tahoe occupancy was up 5.5 percent in July versus 2015, accompanied by an increase in rate of 4.1 percent. North Lake Tahoe occupancy for the past six months (February - July) was up 14.7 percent for the period compared to same period last year, while rate increased 10.0 percent. Bookings taken in July for arrival in July were up 18.4 percent compared to bookings taken in July 2015 (not shown).

		2016/17	2015/16	Year over Year % Diff
<b>a. Last Month Performance: Current YTD vs. Previous YTD</b>				
Occupancy Rates during last month (July, 2016) were up (5.5%) compared to the same period last year (July, 2015), while Average Daily Rate was also up (4.1%).	Occupancy (July) :	<b>74.5%</b>	<b>70.6%</b>	<b>5.5%</b>
	ADR (July) :	<b>\$298</b>	<b>\$286</b>	<b>4.1%</b>
<b>b. Next Month Performance: Current YTD vs. Previous YTD</b>				
Occupancy Rates for next month (August, 2016) are down (-0.3%) compared to the same period last year, while Average Daily Rate is also down (-2.5%).	Occupancy (August) :	<b>57.4%</b>	<b>57.6%</b>	<b>-0.3%</b>
	ADR (August) :	<b>\$270</b>	<b>\$277</b>	<b>-2.5%</b>
<b>c. Historical 6 Month Actual Performance: Current YTD vs. Previous YTD</b>				
Occupancy Rates for the previous 6 months (February - July) are up (14.7%) compared to the same period last year, while Average Daily Rate is also up (10.0%).	Occ - 6 Month Historic	<b>54.6%</b>	<b>47.6%</b>	<b>14.7%</b>
	ADR - 6 Month Historic	<b>\$256</b>	<b>\$233</b>	<b>10.0%</b>
<b>d. Future 6 Month On The Books Performance: Current YTD vs. Previous YTD</b>				
Occupancy Rates for the upcoming 6 months (August - January) are up (13.8%) compared to the same period last year, while Average Daily Rate is down (-7.1%).	Occ - 6 Month Future	<b>27.0%</b>	<b>23.7%</b>	<b>13.8%</b>
	ADR - 6 Month Future	<b>\$225</b>	<b>\$242</b>	<b>-7.1%</b>
<b>e. Incremental Pacing - % Change in Rooms Booked last Calendar Month: Jul. 31, 2016 vs. Previous Year</b>				
Rooms Booked during last month (July, 2016) compared to Rooms Booked during the same period last year (July, 2015) for all arrival dates are down by (-13.2%)	Booking Pace (July):	<b>6.2%</b>	<b>7.2%</b>	<b>-13.2%</b>

**LOOKING FORWARD** It is now the peak of the summer travel season and concerns over economic storm clouds as we looked for fallout from the Brexit vote, have failed to materialize. Markets appear on a roll, with the Dow hitting record levels in July and carrying that momentum into August. Employers are also exceeding expectations of late and there are no clear threats to job creation in the immediate future, which ought to keep consumers confident. However, economic stability leads the Federal Reserve to consider increasing interest rates, and federal election years tend to create uncertainty in the marketplace, at least until election day. So we move into the end of summer and the dynamic, new September / October "season" with a note of caution, but not one of concern. Clearly, the travel consumer is bullish on destination travel, with the months ahead looking very strong. Based on the aggregate of DestiMetrics industry-wide data, on-the-books aggregate occupancy for all destinations for the upcoming six months (August - January) is up 8.2 percent, while rate is also up 4.3 percent from the same period last year. Meanwhile, bookings made during July for arrival July - December was down -7.9 percent compared to the same period in 2015. Locally, North Lake Tahoe on-the-books occupancy for August 2016 is down slightly -0.3 percent compared to 2015, accompanied by a decrease in rate of -2.5 percent. Occupancy on-the-books for the upcoming six months (August - January) is up 13.8 percent compared to the same period last year, with a decrease in rate of -7.1 percent. North Lake Tahoe bookings taken in July for arrival July - December were down -13.2 percent compared to the same period last year, with gains in one of the six months in scope.

**For more information:**

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M-2





# Executive Summary

## Res Activity Outlook as of Jul 31, 2016

### Executive Summary

Data based on a sample of up to 10 properties in the North Lake Tahoe destination, representing up to 1176 Units (DestiMetrics Census\*\*) and 36.42% of 3229 total units in the North Lake Tahoe destination (Destination Census\*\*\*)

Last Month Performance: Current YTD vs. Previous YTD	2016/17	2015/16	Year over Year % Variance
North Lake Tahoe Occupancy for last month (Jul) changed by (5.5%)	Occupancy (Jul) : 74.5%	70.6%	5.5%
North Lake Tahoe ADR for last month (Jul) changed by (4.1%)	ADR (Jul) : \$ 298	\$ 286	4.1%
North Lake Tahoe RevPAR for last month (Jul) changed by (9.8%)	RevPAR (Jul) : \$ 222	\$ 202	9.8%
<b>Next Month Performance: Current YTD vs. Previous YTD</b>			
North Lake Tahoe Occupancy for next month (Aug) changed by (-0.3%)	Occupancy (Aug) : 57.4%	57.6%	-0.3%
North Lake Tahoe ADR for next month (Aug) changed by (-2.5%)	ADR (Aug) : \$ 270	\$ 277	-2.5%
North Lake Tahoe RevPAR for next month (Aug) changed by (-2.8%)	RevPAR (Aug) : \$ 155	\$ 159	-2.8%
<b>Historical 6 Month Actual Performance: Current YTD vs. Previous YTD</b>			
North Lake Tahoe Occupancy for the past 6 months changed by (14.7%)	Occupancy : 54.6%	47.6%	14.7%
North Lake Tahoe ADR for the past 6 months changed by (10.0%)	ADR : \$ 256	\$ 233	10.0%
North Lake Tahoe RevPAR for the past 6 months changed by (26.2%)	RevPAR : \$ 140	\$ 111	26.2%
<b>Future 6 Month On The Books Performance: Current YTD vs. Previous YTD</b>			
North Lake Tahoe Occupancy for the future 6 months changed by (13.7%)	Occupancy : 26.8%	23.5%	13.7%
North Lake Tahoe ADR for the future 6 months changed by (-7.0%)	ADR : \$ 225	\$ 242	-7.0%
North Lake Tahoe RevPAR for the future 6 months changed by (5.7%)	RevPAR : \$ 60	\$ 57	5.7%
<b>Incremental Pacing - % Variance in Rooms Booked last Calendar Month: Jul 31, 2016 vs. Previous Year</b>			
Rooms Booked during last month (Jul,16) compared to Rooms Booked during the same period last year (Jul,15) for all arrival dates has changed by (-13.2%)	Booking Pace (Jul)	7.2%	-13.2%

\* DestiMetrics Census: Total number of rooms reported by participating DestiMetrics properties as available for short-term rental in the reporting month. This number can vary monthly as inventories and report participants change over time. \*\* Destination Census: The total number of rooms available for rental within the community as established by the and adjusted for properties that have opened / closed since that time. This number varies infrequently as new properties start, or existing properties cease operations.

DESCRIPTION: The Reservation Activity Outlook Report tracks occupancy, average daily rate (ADR), and revenue per available room (RevPAR), the key metrics most of interest to lodging properties. The report combines the data sets of participating properties into a destination wide view that features three data sets (providing that sufficient information is available) including: (i) current YTD occupancy, (ii) last YTD occupancy, (iii) last season's ending occupancy. The Reservation Activity Outlook Report is generated on a monthly basis, usually for a 12 month subscription period, and is created from data provided by a group of properties participating in a cooperative manner, and representing a valid set of data as a result. Report results are provided only to those properties who participate by submitting their data. Additionally, participating properties can order (on an opt-in basis) an individual report which shows the reservation activity of their property, measured against an aggregated set of competitive properties that they choose from amongst DestiMetrics's other participants. As is the case in all DestiMetrics data, all information provided by individual properties is strictly confidential, except when aggregated with other data and indistinguishable as a result.

**Monthly Report July 2016**  
**CONFERENCE REVENUE STATISTICS**

**North Shore Properties**

**Year to Date Bookings/Monthly Production Detail FY 16/17**

Prepared By: Anna Atwood, Marketing Executive Assistant

	<u>FY 16/17</u>	<u>FY 15/16</u>	<u>Variance</u>
Total Revenue Booked as of 7/31/16:	\$2,466,474	\$2,560,289	-4%
Forecasted Commission for this Revenue:	\$111,042	\$140,076	-21%
Number of Room Nights:	14736	14269	3%
Number of Delegates:	13099	16818	-22%
Annual Revenue Goal:	\$3,000,000	\$2,800,000	7%
Annual Commission Goal:	\$173,000	\$165,000	5%

<u>Monthly Detail/Activity</u>	<u>July-16</u>	<u>July-15</u>	
<u>Number of Groups Booked:</u>	2	4	
Revenue Booked:	\$84,736	\$119,459	-29%
Projected Commission:	\$0	\$3,023	-100%
Room Nights:	655	850	-23%
Number of Delegates:	425	10390	-96%
		1 Ca Assoc., 1 Corp, 1 Smf, 1	
Booked Group Types:	1 Corp, 1 Govt.	Assoc.	
Lost Business, # of Groups:	3	4	

<u>Arrived in the month</u>	<u>July-16</u>	<u>July-15</u>	
Number of Groups:	6	7	
Revenue Arrived:	\$1,025,536	\$569,373	80%
Projected Commission:	\$55,670	\$18,614	199%
Room Nights:	4926	2686	83%
Number of Delegates:	1551	1790	-13%
	2 Corp., 2 Assoc, 1 Govt.	4 Corp, 1 Assn.,	
Arrived Group Types:	1 Seminar	1 Smf, 1 Govt.	

For 2017/18:	<b>\$248,243</b>	<b>\$500,000</b>
For 2018/19:	<b>\$234,688</b>	<b>\$250,000</b>

NUMBER OF LEADS Generated as of 6/30/16:	<b>16</b>
YTD 7/31/15:	9
YTD 7/31/14:	16

**Total Number of Leads Generated in Previous Years:**

2015/16	194
2014/2015	175

M-4

**Monthly Report July 2016**  
**CONFERENCE REVENUE STATISTICS**

**South Lake Tahoe**

**Year to Date Bookings/Monthly Production Detail FY 16/17**

Prepared By: Anna Atwood, Marketing Executive Assistant

	<u>16/17</u>	<u>15/16</u>	<u>Variance</u>
Total Revenue Booked as of 7/30/16:	\$224,739	\$81,066	177%
Forecasted Commission for this Revenue:	\$11,655	\$5,415	115%
Number of Room Nights:	1888	668	183%
Number of Delegates:	1054	404	161%
Annual Commission Projection:	\$15,000	\$10,000	50%

<u>Monthly Detail/Activity</u>	<u>July-16</u>	<u>July-15</u>	
<u>Number of Groups Booked:</u>	2	2	
Revenue Booked:	\$26,320	\$7,662	244%
Projected Commission:	\$3,948	\$1,149	244%
Room Nights:	244	66	270%
Number of Delegates:	529	68	678%
Booked Group Types:	2 Corp.	2 Smf	

<u>Arrived in the month</u>	<u>July-16</u>	<u>July-15</u>	
Number of Groups:	1	3	
Revenue Arrived:	\$19,526	\$30,232	
Projected Commission:	\$0	\$1,749	
Room Nights:	64	211	
Number of Delegates:	30	150	
Arrived Group Types:	1 Corp.	1 Assoc., 2 Smf	

**NUMBER OF LEADS Generated as of 7/30/16: 16**

**Total Number of Leads Generated in Previous Years:**

2014/2015	175
2013/2014	172
2012/2013:	171
2011/2012:	119
2010/2011:	92
2009/2010:	107
2008/2009:	151
2007/2008:	209
2006/2007:	205

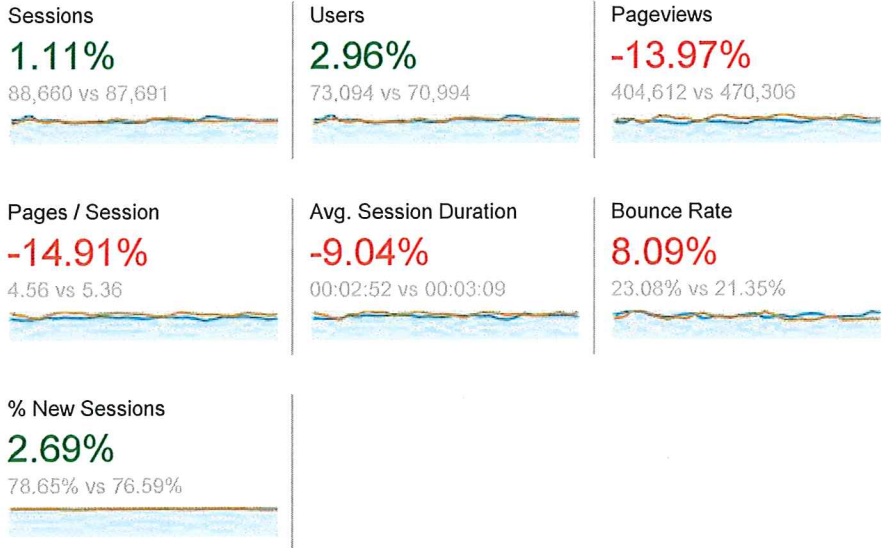
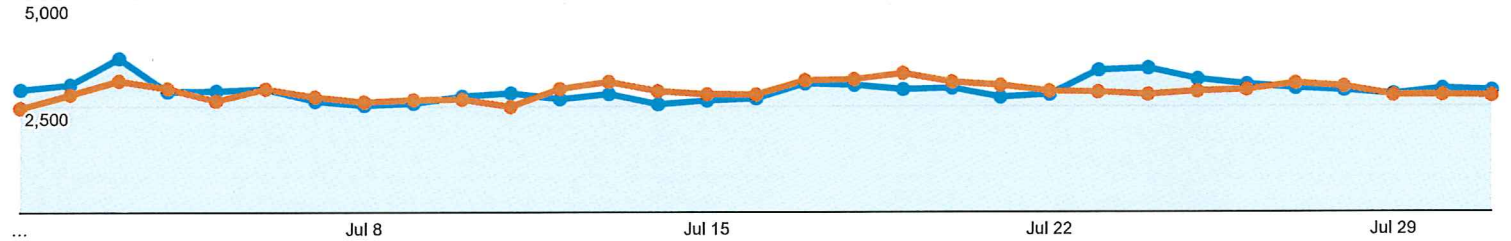
# Audience Overview

Jul 1, 2016 - Jul 31, 2016  
Compare to: Jul 1, 2015 - Jul 31, 2015

All Users  
+0.00% Sessions

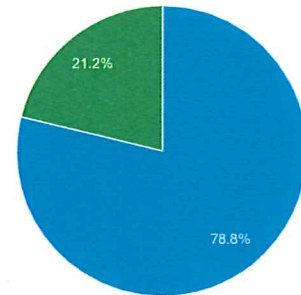
## Overview

Jul 1, 2016 - Jul 31, 2016: Sessions  
Jul 1, 2015 - Jul 31, 2015: Sessions

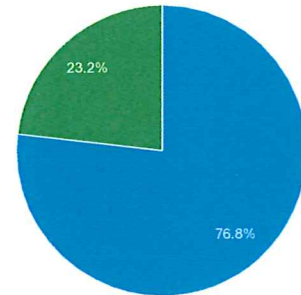


■ New Visitor ■ Returning Visitor

Jul 1, 2016 - Jul 31, 2016



Jul 1, 2015 - Jul 31, 2015



Language	Sessions	% Sessions
<b>1. en-us</b>		
Jul 1, 2016 - Jul 31, 2016	84,893	95.75%
Jul 1, 2015 - Jul 31, 2015	83,406	95.11%
<b>% Change</b>	<b>1.78%</b>	<b>0.67%</b>
<b>2. en-gb</b>		
Jul 1, 2016 - Jul 31, 2016	777	0.88%
Jul 1, 2015 - Jul 31, 2015	643	0.73%
<b>% Change</b>	<b>20.84%</b>	<b>19.52%</b>
<b>3. es-419</b>		
Jul 1, 2016 - Jul 31, 2016	213	0.24%
Jul 1, 2015 - Jul 31, 2015	179	0.15%

M-6



Jul 1, 2015 - Jul 31, 2015	245	0.28%
<b>% Change</b>	<b>-16.73%</b>	<b>-17.64%</b>
<b>5. en-ca</b>		
Jul 1, 2016 - Jul 31, 2016	188	0.21%
Jul 1, 2015 - Jul 31, 2015	48	0.05%
<b>% Change</b>	<b>291.67%</b>	<b>287.39%</b>
<b>6. en-au</b>		
Jul 1, 2016 - Jul 31, 2016	169	0.19%
Jul 1, 2015 - Jul 31, 2015	80	0.09%
<b>% Change</b>	<b>111.25%</b>	<b>108.94%</b>
<b>7. es-xl</b>		
Jul 1, 2016 - Jul 31, 2016	153	0.17%
Jul 1, 2015 - Jul 31, 2015	40	0.05%
<b>% Change</b>	<b>282.50%</b>	<b>278.32%</b>
<b>8. es</b>		
Jul 1, 2016 - Jul 31, 2016	148	0.17%
Jul 1, 2015 - Jul 31, 2015	135	0.15%
<b>% Change</b>	<b>9.63%</b>	<b>8.43%</b>
<b>9. de-de</b>		
Jul 1, 2016 - Jul 31, 2016	122	0.14%
Jul 1, 2015 - Jul 31, 2015	147	0.17%
<b>% Change</b>	<b>-17.01%</b>	<b>-17.91%</b>
<b>10. zh-cn</b>		
Jul 1, 2016 - Jul 31, 2016	116	0.13%
Jul 1, 2015 - Jul 31, 2015	128	0.15%
<b>% Change</b>	<b>-9.38%</b>	<b>-10.37%</b>