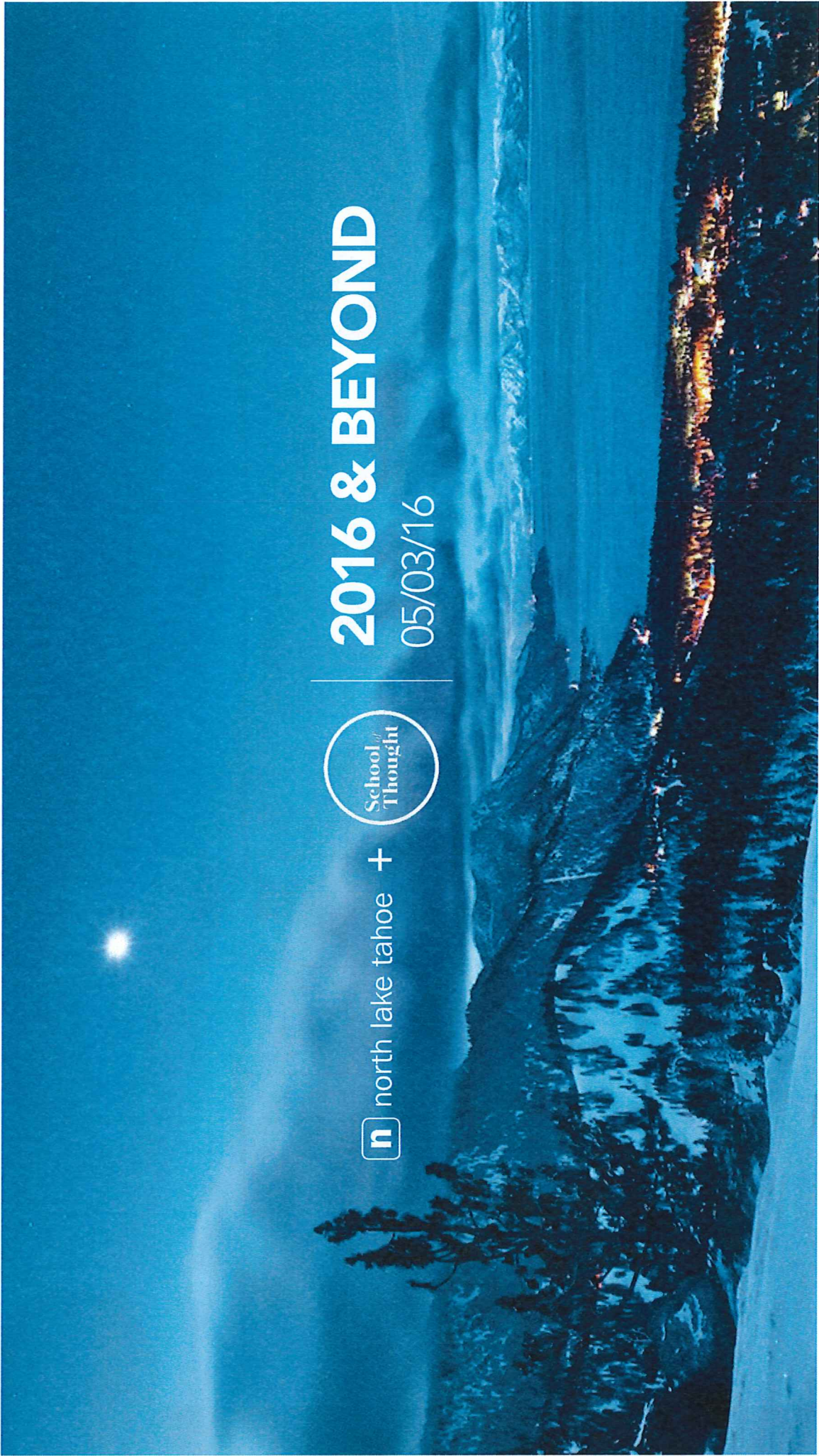


n north lake tahoe +



2016 & BEYOND

05/03/16





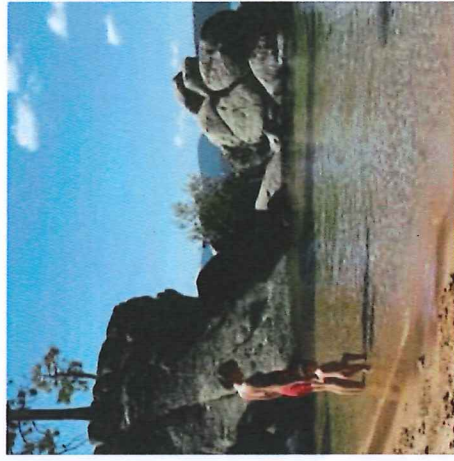
Ben



Karina



Tom



Rachel



STEP BACK, GET PERSPECTIVE

LAST MEETING



LOOK TO THE FUTURE

TODAY



**OUR GOAL
IS SUCCESS**

- **INCREASINGLY VALUABLE BRAND**
- **HEADS IN BEDS**
- **PARTNERSHIP (ROWING TOGETHER)**

HOW TO ROW BETTER TOGETHER?

AGREEING ON NEW STRATEGY, KPIS

- WITH LIMITED RESOURCES, THIS IS CRUCIAL
- REFERRALS. TRAFFIC. COST PER ACQUISITION. AWARENESS.

6-MONTH CAMPAIGN REPORT

Partners	Impressions	Clicks	CTR	CPC	Lodging Page View Throughs	LP VTR	Completed Views	VCR	CPCV	Avg. Ad Position
DataXu	39,460,372	76,834	0.19%	\$1.43	30,431	0.077%	1,145,046	46%	\$0.032	-
TripAdvisor	2,131,921	3,059	0.14%	\$9.55	452	0.021%	-	-	-	-
GumGum	2,855,756	15,886	0.56%	\$1.73	107	0.004%	-	-	-	-
Hulu	1,589,388	2,115	0.13%	\$19.50	74	0.005%	1,223,853	100%	\$0.031	-
Google	934,280	10,777	1.15%	\$0.88	2704	0.289%	-	-	-	4.2
Grand Total	46,971,717	108,671	0.23%	\$2.00	33,768	0.072%	2,368,899	64%	\$0.032	4.2

Analysis:

- Display partners over-delivered on impressions by 13%
- Fall Campaign ran 2x more impressions than 2014 Winter Campaign, driving 3x more clicks as a result of leveraging more budget into cost-efficient placements of DataXu
- Mid-campaign optimizations were successful

Winter 2014-15
Campaign Benchmark
(NorCal + SoCal, Digital + Search):

- 19.2MM Impressions
- 36.6K clicks (0.19% CTR)

*Lodging Page VTR not tracked

Current KPIs



STRATEGY, 2016 AND BEYOND

School of
Thought

**WE WENT BACK
TO THE SOURCE**

**School
of
Thought**

2015 North Lake Tahoe Tourism Master Plan

As of 09.24.15

A Placer County Investment Plan

MAINTAIN FOCUS ON THE BRAND

School of
Thought

Destinations ...are looking for ways to distinguish themselves from competitors.

The challenge is to not try to become everything to everybody.

Summary of Trends

A summary of the trends for both the summer and winter comparable set includes the following:³

- **Increased focus on events:** Since 2008, comparable destinations have increasingly focused on special events to motivate visitation. The events are often commoditized with little differentiation. North Lake Tahoe must stand out in a saturated event marketplace.
- **Increased focus on destination differentiation:** Destinations do not seek to be the low cost provider but are looking for ways to distinguish themselves from competitors. The challenge is to not try to become everything to everybody. North Lake Tahoe must maintain a clear focus on their identity and brand so they can carefully calibrate messaging and programming for the desired audience.
- **Increased focus on niche segments:** Many destinations are spending heavily on interactive advertising approaches to reach niche segments of the broader market. North Lake Tahoe must focus on their target market with emphasis on attracting desired niche market segments.
- **Continued focus on summer demand at mountain destinations:** A full roster of summer activities and events has been added at ski resorts to increase demand in non-winter months. North Lake Tahoe must keep pace with the variety and quality of activities offered at other summer resorts.

MAINTAIN
AFFINITY WITH
BAY AREA

School
of
Thought

Maintain affinity with the northern California/Bay Area consumer...

2015 Tourism Master Plan Goals

Focus Area: Visitor Activities + Facilities

Goal: Create, maintain and support great amenities, fun things to do and quality places to stay so target audiences want to come here from around the nation and the world.

Focus Area: Transportation

Goal: Get people where they want and need to go while reducing congestion and dependency on the private automobile through development and promotion of a multimodal transportation network.

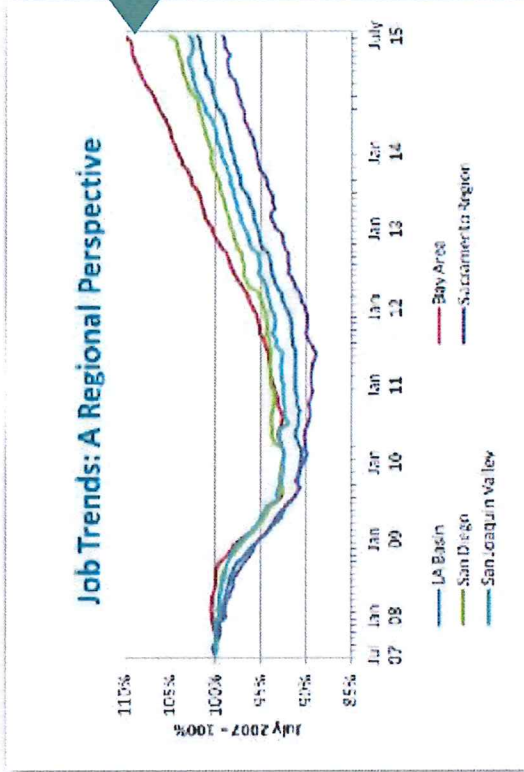
Focus Area: Marketing & Sales

Goal: Bring more visitors to North Lake Tahoe who stay longer, return often and travel during the off-peak periods, while maintaining affinity with the northern California/Bay Area consumer and continuing to expand group business.

WITHIN THE
BAY AREA,
NEW ARRIVALS
TO SF
PRESENT AN
IDEAL NEW
TARGET



Dramatic job growth in the Bay Area = New arrivals with lower awareness of Tahoe, higher income, and a desire for experiences



KQED News TOPICS PROGRAMS & BLOGS SPECIAL COVERAGE BAY CURIOUS

NEWS FIX

You're Not Crazy: The Bay Area Is Getting Way More Crowded

By Lisa Pickoff-White and Dan Brekke
MARCH 26, 2015

U.S. Domestic Migrations From 2013 to 2014

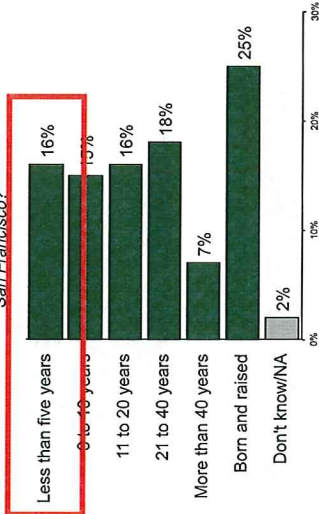
SHARE

SAN FRANCISCO: A CHANGING DEMOGRAPHIC. A NEW SWEET- SPOT.

School of Thought

Respondents had a range of lengths of residences in the City.

Were you born and raised in San Francisco?



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Income and Length of Residence

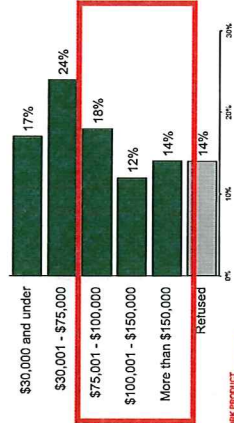
- There are a number of places in the data where the most affluent residents show lower degrees of awareness or engagement, which is unusual.
- However, in San Francisco today many of the most affluent residents are also the newest.
- Consider:
 - Only **9%** of those who have lived in the City at least two decades report incomes in excess of \$150,000
 - Fully **33%** of those who have lived here less than five years do



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Income levels cover a wide range.

I don't need to know the exact amount, but I'm going to read you some categories for household income. Would you please stop me when I have read the category indicating the total combined income for all the people in your household before taxes in 2014?



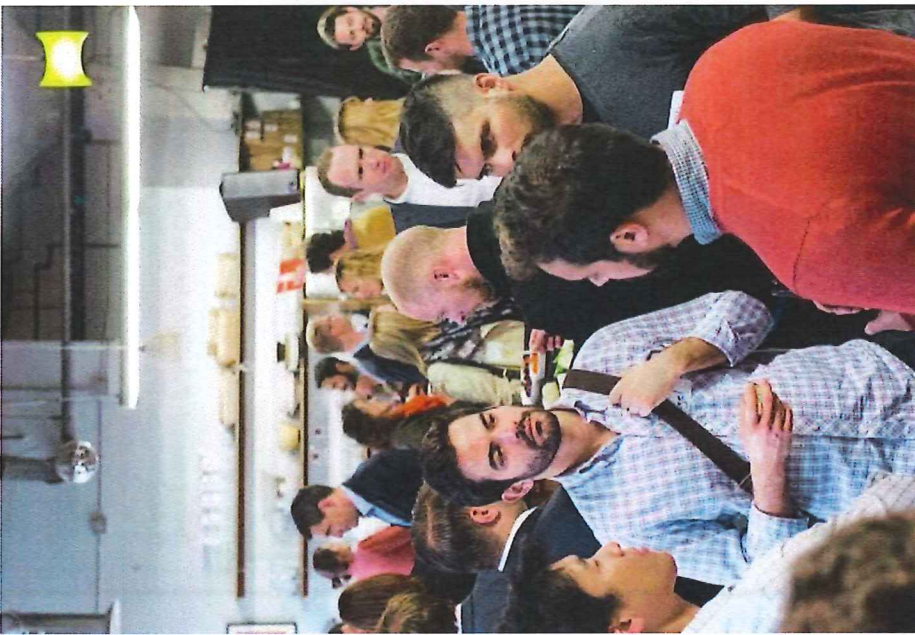
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Recent research (Feb. 2016) for the City of San Francisco highlighted how SF's demographic has evolved.

SF NEWBIES



- HIGH HHI >75K
- MILLENNIALS
- EXPERIENCE-SEEKERS
- NEW TO LOCAL BRANDS & VALUES
- NEWBIES DON'T KNOW THE DIFFERENCE BETWEEN NORTH AND SOUTH



RESORTS
AREN'T
BUILDING THE
BRAND IN SF

School of
Thought

Alpine Meadows
SOUAW VALLEY

TAHOE MIDWEEK
FROM **\$37** PER PERSON/
PER-NIGHT

FIND LODGING »

3 DAYS, 12:59:31 LEFT TO BUY

SAVE
OVER 35%
COMPARED TO
LIFT TICKETS

LIMITED TIME ONLY

epic 4-DAY™

AVOID NON-BUYERS
REMORSE.

FROM
\$349

TAHOE
SUPER PASS

TahoeSuperPass.com

SOUAW | ALPINE | SIERRA | SUGAR BOWL

AIR TRAVELER
SEGMENT IS
MORE
VALUABLE



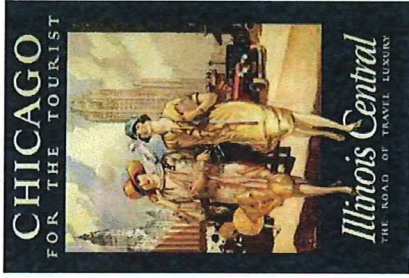
“those that arrive by air service (21%) have a higher average per day expenditure, a longer length of stay and generate 28% of the total overnight visitor expenditures.”



How do visitors get here?

Overall, the majority of visitors (81%) arrive by private automobile. However, **those that arrive by air service (21%)² have a higher average per day expenditure, a longer length of stay and generate 28% of the total overnight visitor expenditures.³** From 2003 to 2012, the amount of visitor spending attributed to those who traveled by air increased by 54% from \$99.5 million to \$153.4 million.⁴ Emerit Benchmark not defined. The RRC 2014 visitor survey reconfirms the higher average spending from visitors arriving by air.^{5d}

BUT KEEP IN
MIND LIFETIME
VALUE



1 x 3k?



50 x .5k?

DO TARGET THE DRIVE-UP MARKET

"Maintain and strengthen the growing drive up market"

Region Direct Travel Total Spending, 1992-2014 (\$Million)

Region	1992 through 2012													Annual Change	
	1992	1994	1996	1998	2000	2002	2004	2006	2008	2010	2012	2013	2014	13-14	92-14
North Coast	1,302	1,369	1,507	1,643	1,844	1,876	1,973	2,253	2,392	2,367	2,602	2,708	2,762	2.0%	3.5%
Sierra Cascade	546	561	597	614	713	767	816	923	957	902	966	954	967	1.4%	2.6%
San Francisco Bay Area	12,403	13,004	15,172	17,320	20,688	17,385	18,768	21,755	23,162	24,474	27,205	28,651	29,987	4.7%	4.1%
Central Valley	3,113	3,288	3,485	3,734	4,322	4,423	4,934	5,678	6,049	5,891	6,433	6,426	6,488	1.0%	3.4%
Gold Country	2,029	2,077	2,246	2,450	3,033	3,127	3,281	3,066	3,956	3,790	4,117	4,194	4,288	2.3%	3.3%
High Sierra	1,274	1,373	1,405	1,555	1,755	1,900	2,090	2,236	2,269	2,319	2,512	2,555	2,613	2.3%	3.3%
Central Coast	3,034	3,742	4,218	4,665	5,430	5,396	5,760	6,518	6,709	6,536	7,204	7,494	7,777	3.8%	3.5%
Los Angeles County	12,006	11,976	13,160	14,309	17,622	16,883	19,117	21,369	22,471	21,416	23,655	24,165	25,034	3.6%	3.4%
Orange County	5,040	5,229	5,838	6,416	7,648	7,523	8,393	9,327	9,695	9,206	10,100	10,402	10,829	4.1%	3.5%
San Diego County	6,021	5,803	6,827	8,076	9,830	9,431	10,653	12,013	12,768	12,525	13,703	13,996	14,654	4.7%	4.1%
The Deserts	2,767	2,883	3,126	3,446	3,922	4,195	4,679	5,406	5,741	5,582	6,230	6,315	6,323	1.7%	3.8%
Inland Empire	2,805	2,628	2,809	3,052	3,558	3,989	4,475	5,101	5,397	5,311	5,692	5,675	5,785	2.0%	3.9%
California*	52.6	54.0	60.4	67.3	80.4	76.9	85.1	96.5	101.6	100.4	110.6	113.4	117.5	3.6%	3.7%

Source: Dean Runyan California Travel Impacts, 1992-2014, April 2015

What this Means to North Lake Tahoe

Sidebar list

- Maintain and strengthen the growing drive-up market.
- Expand regional marketing to include potential growth areas such as Reno.

FILL OFF-PEAK

Bring more visitors to North Lake Tahoe who stay longer, return often and travel during the off-peak periods

2015 Tourism Master Plan Goals

Focus Area: Visitor Activities + Facilities

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Focus Area: Marketing & Sales

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BUILDING THE BRAND & CREATIVE

School of
Thought

**WITH LIMITED
RESOURCES,
EFFICIENCY IS
KEY**

- Build the NLT brand
- Target LA primarily in winter
- Target SF primarily in summer
- Target air travelers in LA, then roll out to other markets
- Tie social to larger brand idea(s)

**OUR BRAND
IS MORE THAN
OUR LOGO OR
FONT. IT'S OUR
REPUTATION.**



Real experiences. Authentic. Inviting. Iconic.



WE ARE MOST
SUCCESSFUL
WHEN
GROUNDED IN A
HUMAN NEED
OR TRUTH.

School
of
Thought

“Time poverty is more of a factor than ever and is now a major driver of decisions”

control over travel planning and booking.

- Overall cost increases and new user-fees are common for all travel related segments.
- Time poverty is more of a factor than ever and is now a major driver of decisions.
- Consumers are wiser, more resourceful and centered on value and quality of experience.

Recreation is a significant component of not only North Lake Tahoe's tourism economy but also the national and international economy. The Outdoor Industry Foundation estimates outdoor recreation (including human powered sport events) contributes \$6.6 billion annually to the U.S. economy. Between 2005 and 2011 this market segment grew approximately 5% annually while other sectors contracted.⁹ According to the Global Wellness Institute, the global health and wellness tourism market (including



n north lake tahoe

WHERE TO STAY ▾ THINGS TO DO ▾ DEALS ▾ CHAT MENU ≡

YOU'RE NEVER TOO OLD FOR A DITCH DAY.

With more than a dozen world-class resorts, you'll have no shortage of reasons to take some personal time.

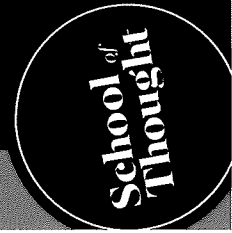
→

THIS HUMAN NEED LED TO THIS "ESCAPE, GET YOUR BALANCE BACK" APPROACH.

**EACH REGION HAS A
DISTINCT NEED.**

**School of
Thought**

1. LOS ANGELES



LA STRATEGY


**THERE IS A REAL WINTER
WAITING IN NORTH LAKE TAHOE**





L.A. IS SO LAST WINTER.

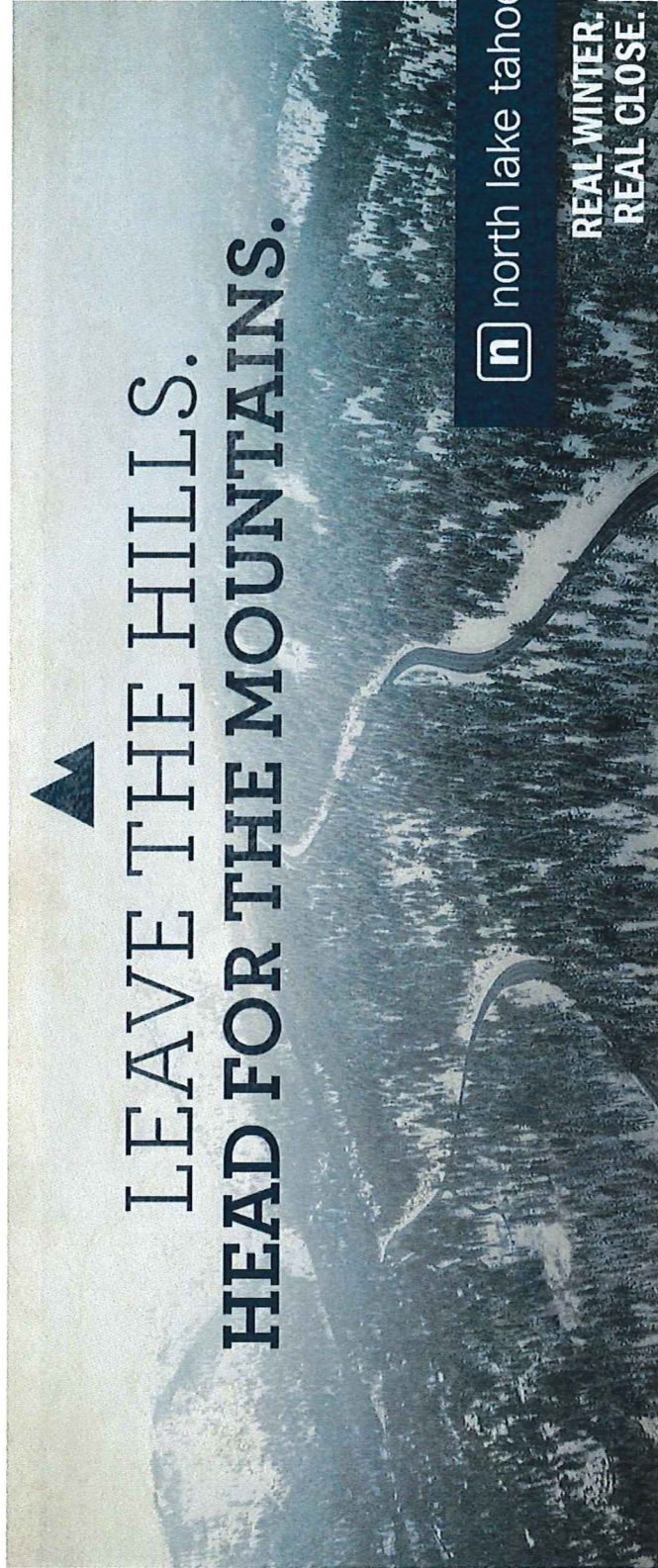


 north lake tahoe

**REAL WINTER.
REAL CLOSE.**



▲
**LEAVE THE HILLS.
HEAD FOR THE MOUNTAINS.**



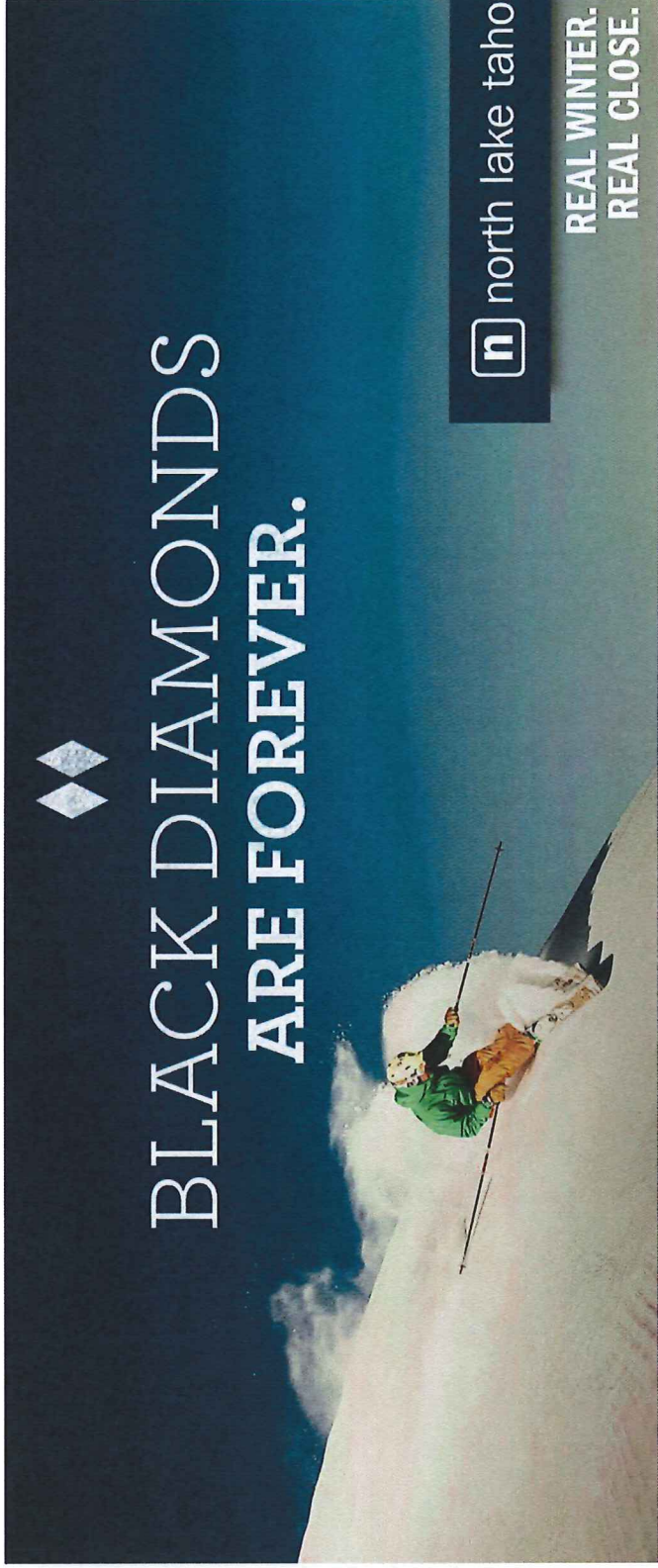
n north lake tahoe


**REAL WINTER.
REAL CLOSE.**





BLACK DIAMONDS
ARE FOREVER.

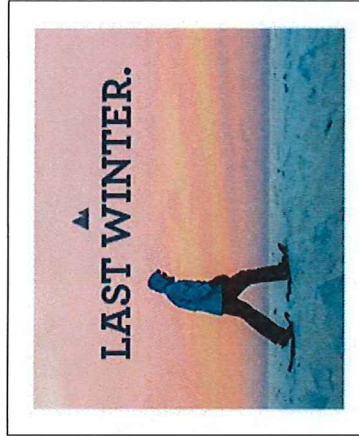
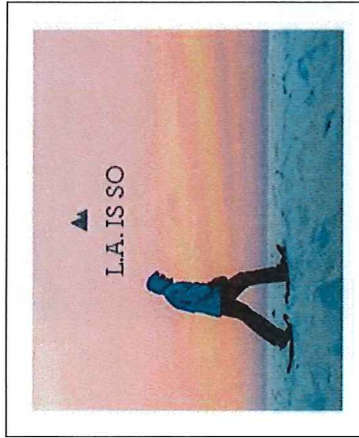


 north lake tahoe

REAL WINTER.
REAL CLOSE.



WEB BANNER



POP UP ICE TRUCK (TIED TO SOCIAL MEDIA)



POP UP ICE TRUCK (TIED TO SOCIAL MEDIA)



Tweets Tweets & replies Photos & videos

North Lake Tahoe
What has four wheels, feels like winter, and is on the corner of Wilshire/La Brea? You guessed it! We'll be here until 6pm, so come cool down with us. #RealWinterLA

North Lake Tahoe
it's 72 and sunny outside here on Hoover/Sunset. Luckily, it's 20 degrees inside our awesome ice truck. Come check us out! #RealWinterLA

North Lake Tahoe
The weatherman forgot to mention that there's a chance of ice and snow today on the corner of Pico/Ocean Ave. #RealWinterLA



2. DIRECT FLIGHT LINKS




**IN NEW FLIGHT
MARKETS**

**HIGH IMPACT CREATIVE
REMINDS PEOPLE OF THE NEW
SERVICE / OPPORTUNITY.**

**School^{of}
Thought**



**WE HAVE LIFTOFF.
7 FLIGHTS WEEKLY JFK TO RENO.**

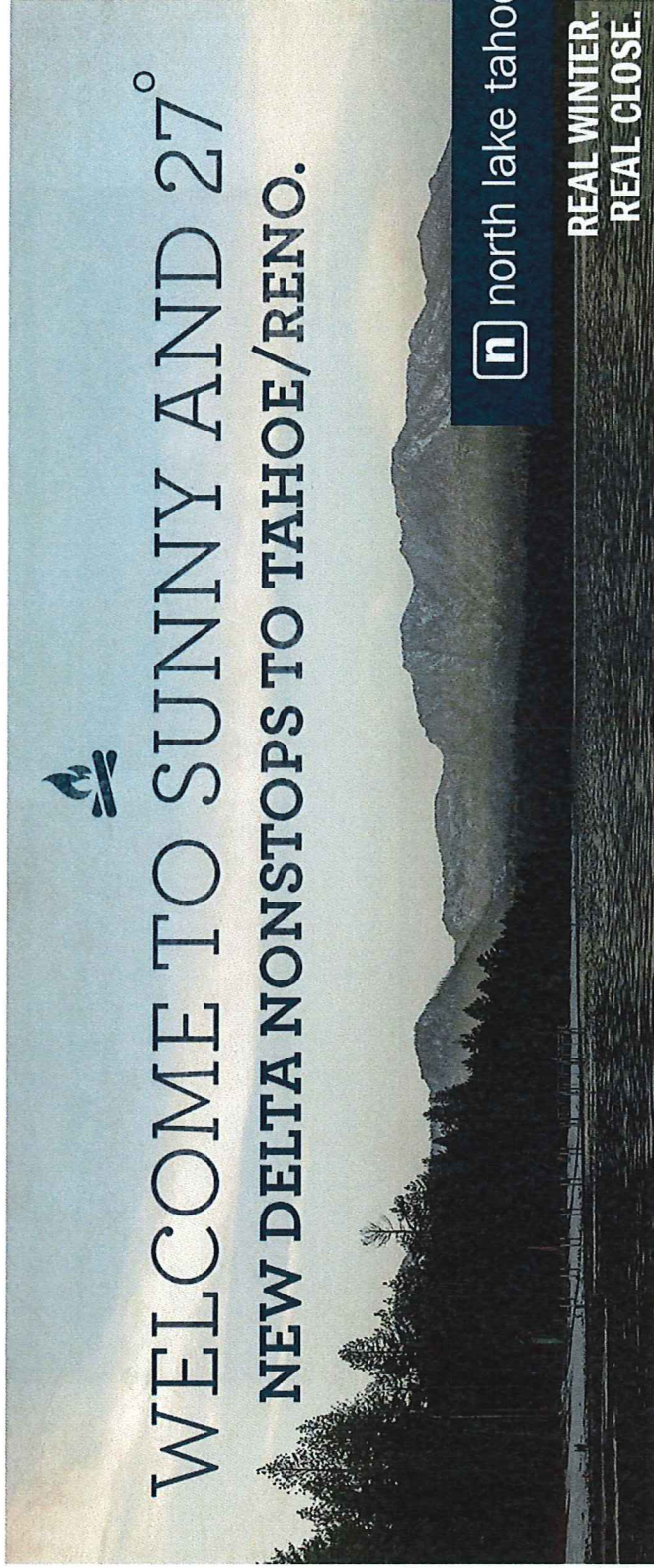
 north lake tahoe


**REAL WINTER.
REAL CLOSE.**





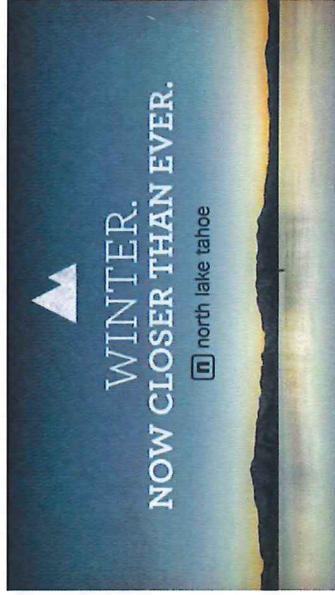
WELCOME TO SUNNY AND 27°
NEW DELTA NONSTOPS TO TAHOE/RENO.




 north lake tahoe

REAL WINTER.
REAL CLOSE.





WINTER.
NOW CLOSER THAN EVER.

 north lake tahoe



7 FLIGHTS WEEKLY.
JFK TO RENO.

 north lake tahoe



DYNAMIC WEB BANNER

YOU'RE AN HOUR AWAY FROM AN AMAZING WINTER.

FROM:	LAX
TO:	RENO
ONE WAY:	\$129

north lake tahoe
Real Winter.
Real Close.

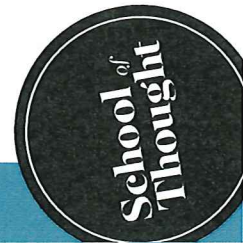
PLAN YOUR TRIP →

REAL WINTER. REAL CLOSE.

FROM:	LAX
TO:	RENO
ONE WAY:	\$129

north lake tahoe
Real Winter.
Real Close.

PLAN YOUR TRIP →



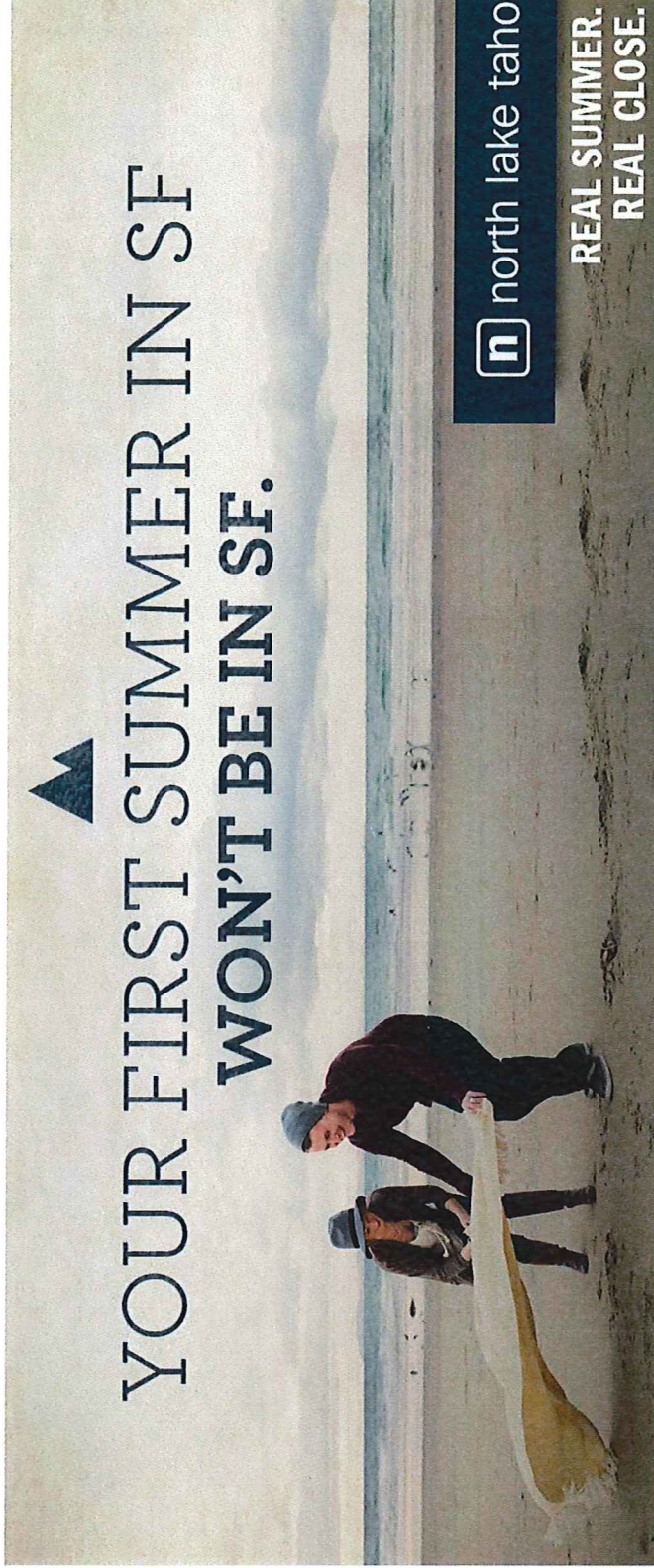
3. BACK TO S.F.




SF STRATEGY

LET'S MAKE NEWBIES AWARE
OF NORTH LAKE / (E.G., YOU
DON'T KNOW WHAT YOU'RE
MISSING.)

▲
YOUR FIRST SUMMER IN SF
WON'T BE IN SF.



 north lake tahoe


REAL SUMMER.
REAL CLOSE.



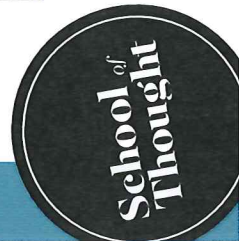


IS IT STILL A SUMMER FRIDAY
WHEN THERE'S NO SUMMER?



 north lake tahoe


REAL SUMMER.
REAL CLOSE.





WHEN THE FOG ROLLS IN,
IT'S TIME FOR YOU TO ROLL OUT.

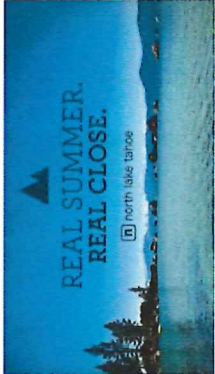
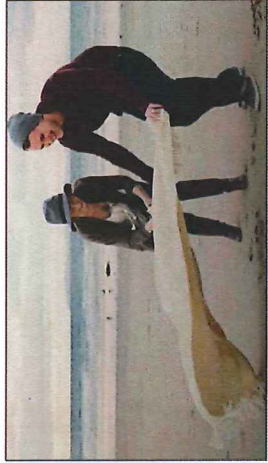
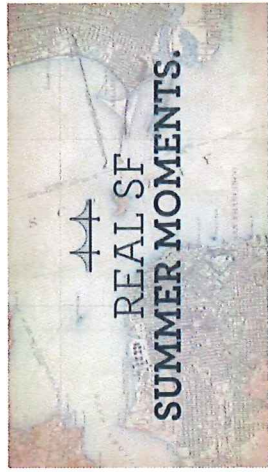


 north lake tahoe

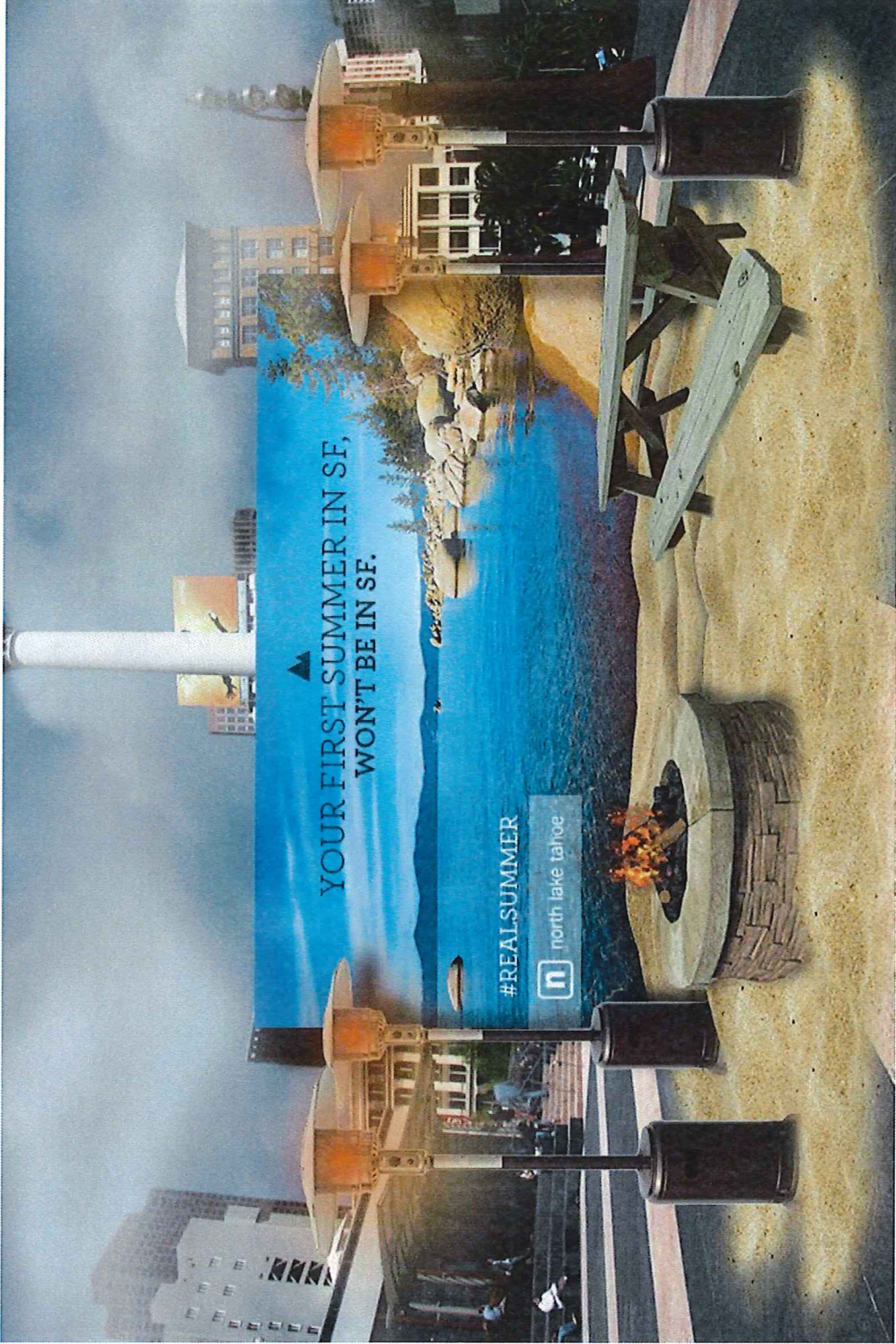
REAL SUMMER.
REAL CLOSE.



VIDEO / PRE-ROLL



POP-UP WARM UP STUNT (TIED TO SOCIAL MEDIA)



CONFERENCES, TAILORED TO BAY AREA TECH.



 **SORRY.**
NOT AVAILABLE IN VR.

3,000 Rooms | WiFi with a View
We get it, tech is tough. But VR shouldn't be the closest your programmers get to being outside. With fresh mountain air and crystal water, North Lake Tahoe will make any conference feel like a vacation. Plus, we're just minutes away from the Reno International Airport. So, give us a call today and let us show you what it's like to conference differently. 530-581-8703.
GoTahoeNorth.com/meetings

 north lake tahoe



MEDIA STRATEGY

School of
Thought

TACTICS WILL
BE DEFINED,
ONCE WE ALL
ALIGN ON
STRATEGY.



THE MEDIA MIX

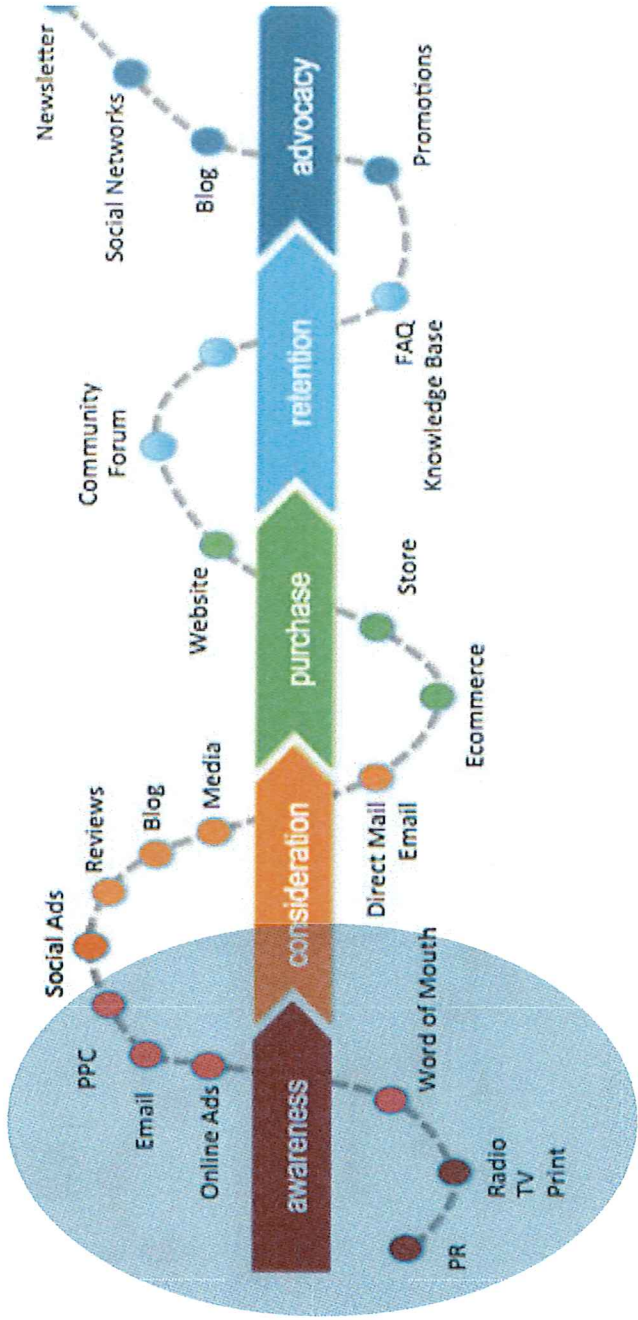


© @searchingpeople.com

PAID MEDIA IS MOST EFFECTIVE TO BUILD AWARENESS



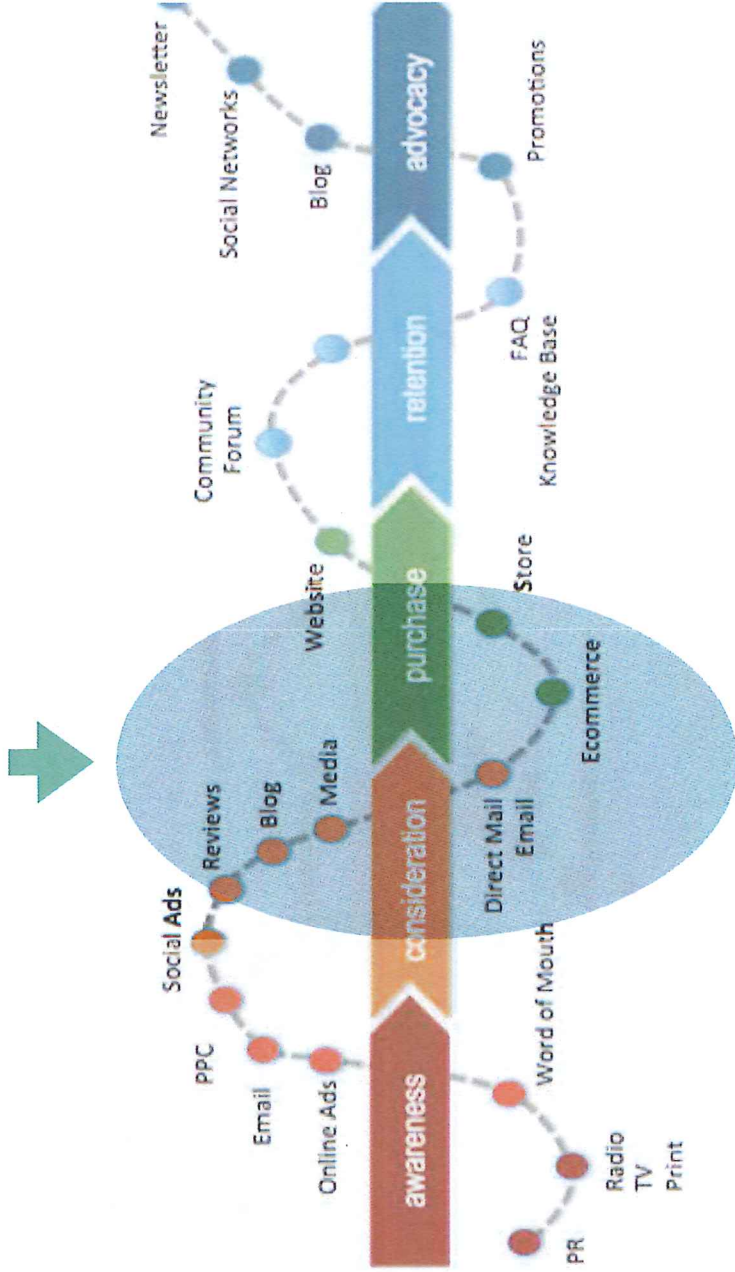
Tactics to drive awareness



**OWNED
MEDIA IS
EFFECTIVE
WHERE WE
ALREADY HAVE
AWARENESS**



Tactics to reach audience members who already know NLT



ONE WAY TO ALIGN ON STRATEGY

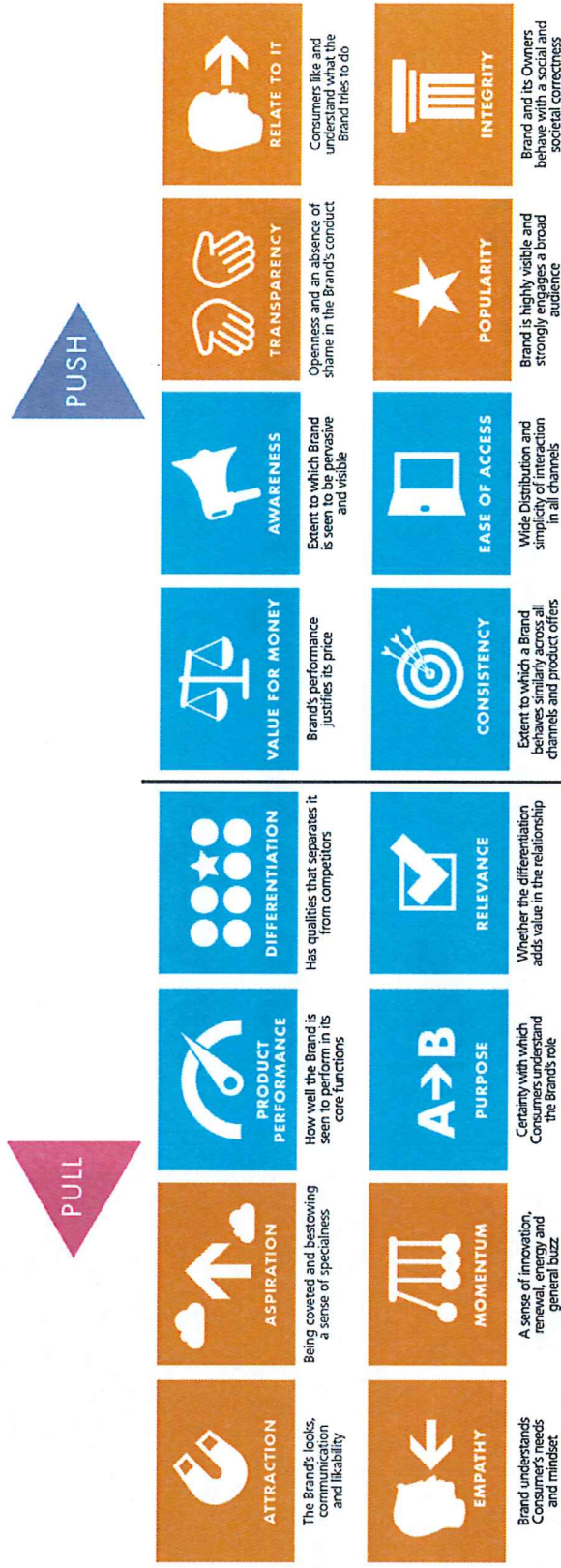


TRANSGRESSIVE X: COSTS LESS THAN TRADITIONAL RESEARCH, DELIVERS MORE INSIGHT

<p>Objective of Research:</p> <ul style="list-style-type: none">• Measure the effectiveness of the NLT awareness campaign; measure our target's perceptions about NLT.	<p>Cost: \$ 20,000</p>
<p>What we will do:</p> <p><u>Pre- and post-campaign (2 rounds)</u></p> <ul style="list-style-type: none">a) Measure attitudes and brand with 16 key metrics.b) Test campaign pillars	<p>Duration: 1 week to setup and 3 weeks for each research round</p>



THE TX DIFFERENCE: MEASURING 16 EXCHANGE DRIVERS



Strength of proposition

Efficacy of Activation



**3 MO / 6 MO /
12 MO PLAN**

**Work session to define strategy,
KPIs.**

**Build on learnings from current
campaign.**

**Develop new plan, based on
2015-16 plan.**



BILLING

Estimated vs. Actual (in progress)

2015/16 Fees: \$178,000

External Costs (OOP): \$72,000

Total Retainer:

\$250,000

2015/16 Fees (thus far): \$324,030

2015/16 External Costs (thus far): \$52,228

Total to date:

\$376,258

RETAINER VS HOURLY

- If we switched to hourly, the services delivered would be reduced
- We're happy to discuss any aspect in more detail—just say the word

**WE'VE ACCOMPLISHED QUITE A
LOT TOGETHER**

**School^{of}
Thought**

COMMITMENT



- There is no client we care about more
- We've expanded the team
- No other agency knows the region better
- 2016 -17: Already rolling.



THANK YOU

-YOUR TEAM AT SOT



