

DESTINATION LEVEL RESERVATIONS ACTIVITY SUMMARY

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



north lake tahoe

Destination: North Lake Tahoe

Period: Bookings as of Oct 31, 2022


Executive Summary - Year over Year Variance and Analysis

Data based on a sample of up to 10 properties in the North Lake Tahoe destination, representing up to 1,478 Units ('DestiMetrics Census**) and 45.8% of 3,229 total units in the North Lake Tahoe destination ('Destination Census**')

MARKET OVERVIEW: As October comes to a close, so does our Summer 2022 season. Bookings made in the month helped to push summer revenue to a (very) slight outperformance versus last year, up a mere 0.02 percent. When comparing to the last pre-COVID summer, 2019, revenue was up significantly, 32.1 percent, due to Average Daily Rate (ADR) remaining substantially higher compared to any prior summer on record, actualizing at \$371. Those high rates were the driving factor in keeping revenue from slipping to negative versus last year; though the pace of bookings made in October for arrival in October was up 45.4 percent versus last year and 31.7 percent versus 2019, occupancy otherwise fell short for the season, down -4.0 percent versus last year and -4.6 percent versus 2019. Our key economic indicators lack direction this month – and not for the first time – with broadly varying data. Following a large decline in September, the Dow Jones Industrial Average (DJIA) gained a jaw-dropping 13.9 percent or 3,995.2 points in October to close the month at 32,732.95 points. The positive movement erased the losses of both August and September, 3.2 and 9.6 percent, respectively. While the DJIA showed significant signs of improvement month-over-month, the Consumer Confidence Index (CCI) told a different story. CCI declined in October, down -4.9 percent to 102.5 points (1985=100), the first month-over-month decline since July. In commenting on the change, Lynn Franco, Senior Director of Economic Indicators at The Conference Board said, "Notably, concerns about inflation—which had been receding since July—picked up again, with both gas and food prices serving as main drivers." Additionally, consumers have voiced a declining intent to travel, though as mentioned above, we have not seen a decline in bookings in our October data. Regardless, concerns around a cooling of bookings leading into the holiday season and overall winter persist. Inflation has remained top of mind for many consumers as their bank accounts and wallets remind them of the impact it has on their discretionary dollars. The Federal Reserve has been watching inflation closely and continues to increase interest rates in an effort to reduce prices and cool down the job market. While job creation in October was lower than most prior months this year, the decline was not large enough, with the 261,000 new positions outpacing analysts' expectations of 200,000. We can expect that the Federal Reserve will use this as a queue to raise rates again to further combat inflation. In tandem with job creation, unemployment increased to 3.7 percent in October, up from 3.5 percent in September. While October's economic data was not outright detrimental to our consumers or the industry, it is characteristic of the uncertainty that has defined markets and consumers since the economy started to re-open and most notably since January of this year. This is a complex situation that is only further exacerbated by geopolitical challenges. As we forecast back in February, a summer season revenue gain was going to be difficult given the soft bookings and declining occupancy despite rate gains. In the end, the season was not an overall win or loss, with declining occupancy, gains in rate, and management of revenue goals to essentially flat, probably the best that could be expected given market conditions. Locally, North Lake Tahoe occupancy was up +5.7 percent in October versus 2021, accompanied by an increase in rate of +5.6 percent. North Lake Tahoe occupancy for the past six months (May - October) was up +14.2 percent compared to the same period last year, accompanied with a rate that is up +0.2% compared to last year. Bookings taken in October for arrival in October were up +87.5% compared to bookings taken in October 2021 (not shown).

		2022/23	2021/22	Year over Year % Diff
a. Last Month Performance: Current YTD vs. Previous YTD				
Occupancy Rates during last month (October, 2022) were up (5.7%) compared to the same period last year (October, 2021), while Average Daily Rate was also up (5.6%).	Occupancy (October) :	40.1%	37.9%	5.7%
	ADR (October) :	\$257	\$244	5.6%
b. Next Month Performance: Current YTD vs. Previous YTD				
Occupancy Rates for next month (November, 2022) are up (15.4%) compared to the same period last year, while Average Daily Rate is down (-5.2%).	Occupancy (November) :	29.1%	25.3%	15.4%
	ADR (November) :	\$251	\$264	-5.2%
c. Historical 6 Month Actual Performance: Current YTD vs. Previous YTD				
Occupancy Rates for the previous 6 months (May - October) are up (14.2%) compared to the same period last year, while Average Daily Rate is also up (0.2%).	Occ - 6 Month Historic	53.2%	46.6%	14.2%
	ADR - 6 Month Historic	\$438	\$437	0.2%
d. Future 6 Month On The Books Performance: Current YTD vs. Previous YTD				
Occupancy Rates for the upcoming 6 months (November - April) are up (1.9%) compared to the same period last year, while Average Daily Rate is also up (4.0%).	Occ % - 6 Month Future	23.3%	22.8%	1.9%
	ADR - 6 Month Future	\$394	\$379	4.0%
e. Incremental Pacing - % Change in Rooms Booked last Calendar Month: Oct. 31, 2022 vs. Previous Year				
Rooms Booked during last month (October, 2022) compared to Rooms Booked during the same period last year (October, 2021) for all arrival dates are down by "(-17.8%).	Booking Pace (October):	5.6%	6.8%	-17.8%

LOOKING FORWARD: We enter the winter season with what has become a comfortable level of uncertainty. Economic data – and the experts that analyze them – continue to flash warning signs of a recession, while financial markets make wild swings and consumers remain engaged in mountain travel, even as macroeconomics indicate a pullback in consumer activity. Mountain destinations saw some momentum in October, with the pace of reservations taken in the month for arrival in October up versus both last year and the pre-pandemic 2019 season. And at the same time, financial markets made some dramatic recoveries that might help offset some of the more dire (and pocket-book specific) trends. With early snow in many parts of the west triggering early openings, and cooler temperatures and snow (finally) making their way into the Northeast, the weather part of the equation is good, at least at this early stage. At this stage, occupancy for arrival January through April is showing some modest – and manageable – gains, while both November and December struggle to come close to last year's surge. And while overall the mood is good, supported by the early data, the industry needs to be realistic about growth. As we've said since summer 2021, the momentum of late- and post-pandemic economics and consumerism wasn't ever going to be sustainable, and we anticipate softer gains in occupancy and gentler pace of room rate growth for 2022/23. We also think this should be welcomed as those conditions create a healthy business environment that can be managed, improving the mountain experience for guests, suppliers, and residents. Locally, North Lake Tahoe on-the-books occupancy for October 2022 is up +15.4% compared to 2021, accompanied with a decrease in rate of -5.2 percent. Occupancy on-the-books for the upcoming six months (November - April) is up +1.9 percent compared to the same period last year, with an increase in rate of +4.0 percent. North Lake Tahoe bookings taken in October for arrival October - March are down -17.8 percent compared to the same period last year.

		For more information:	
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Monthly Report Oct 2022

CONFERENCE REVENUE STATISTICS

North Shore Properties

Year to Date Bookings/Monthly Production Detail FY 22/23

Prepared By: Anna Atwood, Office Manager

	<u>FY 22/23</u>	<u>FY 21/22</u>	<u>Variance</u>
Total Revenue Booked as of 10/31/22:	\$1,407,306	\$1,747,110	-19%
Number of Room Nights:	6,291	8177	-23%
Number of Delegates:	3052	3874	-21%
Annual Revenue Goal:	\$2,000,000	\$2,000,000	0%

<u>Monthly Detail/Activity</u>	<u>October-22</u>	<u>October-21</u>	
<u>Number of Groups Booked:</u>	4	4	
Revenue Booked:	\$241,848	\$121,383	99%
Room Nights:	1100	579	90%
Number of Delegates:	596	390	53%

2 Mtg. Planner,
1 Assoc., 1 Non-
Booked Group Types: Profit
Lost Business, # of Groups: 13

0
10

<u>Arrived in the month</u>	<u>October-22</u>	<u>October-21</u>	
Number of Groups:	4	5	
Revenue Arrived:	\$279,048	\$352,682	-21%
Room Nights:	1115	1144	-3%
Number of Delegates:	431	1047	-59%
Arrived Group Types:	2 Corp, 2 Assoc.	2 Corp., 2 Assoc., 1 SMF	

<u>Monthly Detail/Activity</u>	<u>September-22</u>	<u>September-21</u>	
<u>Number of Groups Booked:</u>	4	0	
Revenue Booked:	\$127,050	\$0	
Room Nights:	891	0	
Number of Delegates:	430	0	

1 Corp., 1
Assoc., 1 CA
Assoc., 1 Non-
Booked Group Types: Profit
Lost Business, # of Groups: 13

0
10

<u>Arrived in the month</u>	<u>September</u>	<u>September-22</u>	
Number of Groups:	7	4	
Revenue Arrived:	\$200,928	\$111,814	80%
Room Nights:	968	718	35%
Number of Delegates:	590	255	

Arrived Group Types:	4 Corp, 1 Assoc., 2 Non- Profit	1 Govt, 1 SMF, 1 Asspc., 1 MP
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Monthly Detail/Activity

	<u>August-22</u>	<u>August-21</u>
<u>Number of Groups Booked:</u>	2	0
Revenue Booked:	\$91,595	\$0
Room Nights:	514	0
Number of Delegates:	425	0
Booked Group Types:	1 CA Assoc., 1 Corp.	0
Lost Business, # of Groups:	15	0

Arrived in the month

	<u>August-22</u>	<u>August-21</u>	
Number of Groups:	2	2	
Revenue Arrived:	\$66,677	\$208,360	-68%
Room Nights:	163	795	-79%
Number of Delegates:	66	330	
Arrived Group Types:	1 Corp., 1 Mtg. Planner	2 Assoc.	

Monthly Detail/Activity

	<u>July-22</u>	<u>July-21</u>	
<u>Number of Groups Booked:</u>	2	1	
Revenue Booked:	\$145,856	\$45,903	218%
Room Nights:	465	100	365%
Number of Delegates:	544	50	
Booked Group Types:	2 CA Assoc.	1 Corp.	
Lost Business, # of Groups:	18	22	

Arrived in the month

	<u>July-22</u>	<u>July-21</u>	
Number of Groups:	3	2	
Revenue Arrived:	\$190,117	\$208,360	-9%
Room Nights:	630	795	-21%
Number of Delegates:	455	330	
Arrived Group Types:	1 CA Assoc., 1 Mtg. Planner. 1 Corp.	2 Assoc.	

	<u>Current Numbers</u>	<u>Goals</u>
For 2023/24:	\$194,704	\$2,000,000
For 2024/25:	\$89,550	\$2,000,000

NUMBER OF LEADS Generated as of 10/31/22:	39
YTD 10/31/21:	24
YTD 10/31/20:	35



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October 2022

Meetings & Conventions Report

TURNED DEFINITE

1. National Ski Areas Association - 2023 Winter Show - 1/14/23-1/19/23, 891 rooms, 500 people
2. KZAM Enterprises LLC - 2023 ACG Summer Board - 6/21/23-6/25/23, 117 rooms, 60 people

NEW MEETINGS & RFPs DISTRIBUTED

3. KeyBanc Capital Markets - 2023 March Ski Trip - 3/3/23-3/4/23, 40 rooms, 20 people
4. University of Nevada, Reno - UNR Medicine Cardiovascular COBRE Symposium - 4/6/23-4/8/23, 160 rooms, 100 people
5. HPN - 87902 - Conference April 2023 - 4/25/23-4/29/23, 182 rooms, 100 people
6. National Association of Steel Pipe Distributors - NASPD 2023 Summer Convention - 6/6/23-6/10/23, 185 people, 100 rooms
7. AppFolio - Mid-Year Incentive - 8/8/23-8/10/23, 65 rooms, 30 people
8. Destiny Christian Church - Marriage Enrichment Class - 10/5/23-10/6/23, 100 rooms, 100 people
9. California Association of Administrators of State and Federal Education Programs - 2023 Professional Development Institute - 10/8/23-10/12/23, 675 rooms, 400 people
10. National Oil Recyclers Association - 2023 NORA Annual Conference & Trade Show, 11/8/23-11/11/23, 685 rooms, 230 people
11. Pacific Coast Surgical Association - 96th Annual Meeting - 2/12/25-2/17/25, 586 rooms, 250 people

NEW INQUIRIES

1. Sentinel One - 2023 LABScon - 9/17/23-9/23/23, 614 rooms, 170 people
2. Global Infrastructure Partners - 2023 Ski Incentive - 2/22-23-2-26/26, 318 rooms, 170 people
3. American Orthopedic Foot & Ankle Society - AOFAS Winter Meeting 2025 - 1/21/25-1/25/25, 1286 rooms, 350 people
4. 160over90 - F14187 Reyes Leadership Incentive 2023 - 9/12/23-9/18/23, 245 rooms, 275 people
5. W.L. Gore & Associates, Inc. - Summit Club - 7/24/23-7/26/23, 120 rooms, 40 people
6. Mr. Rooter LLC - 2023-06 Regional Meeting Lake Tahoe - 6/13/23-6/15/23, 60 rooms, 40 people
7. California Police Activities League - CalPAL - Annual Training Conference - Fall 2023 - 10/14/23-10/17/23, 215 rooms, 100 people
8. Medtronic - Diabetes U.S. Sr. Leadership Meeting - 1/10/23-1/11/23, 20 people, 10 rooms
9. Electrical Equipment Representatives Association - EERA 2025 Annual Meeting - 4/25/25-5/2/25, 545 people, 175 rooms

10. Southwest Carpenters - 10/30/22-12/1/22, 130 rooms, 65 people
11. Johnstone Supply - Supplier Conference - 7/19/24-7/26/24, 445 rooms, 175 people
12. Starshot Ventures Inc - 17-1262 Starshot - 6/7/23-6/10/23, 270 rooms, 150 people
13. Partner Colorado Credit Union - 2023 Strategic Planning Session - 8/23/23-8/26/23, 64 rooms, 20 people
14. PING Golf - Conference and Golf Outing Aug 2023 - 7/31/23-8/3/23, 320 rooms, 80 people

CONFERENCE SALES PROJECTS

- Key Projects:
 - Updating meetings pages on GoTahoeNorth.com
 - Newsletter sent 10/27 to 8,011 meeting planners saw a 30% open rate
 - Planning attendance at Visit California Southwest Roadshow on 11/2 in Austin and 11/3 in Dallas
 - Scheduling appointments for Connect West in San Francisco 11/9-11/10
 - Scheduling appointments for HPN Global Partners Conference 11/14-11/16

SITE VISITS & SALES CALLS

- Planning AppFolio Site visit for 11/7-11/8
- NLT Staff spoke on the NLT destination at the National Association of Catering and Events Reno Chapter meeting on 10/10

Chicago Rep Efforts

- Attended Destination Celebration in Indianapolis - Oct 6, 2022
- Met at the ORC with the local Orthopaedic executive teams and planners



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October 2022
Tourism Development Report

KEY MEETINGS & PROJECT WORK

- Key Meetings:
 - Texas Sales Mission 10/3-10/7 with Reno, Travel Nevada, and Las Vegas
 - Met with Southwest Airlines, American Airlines, Priceline and hosted travel agent events in Austin for (52) agents, Dallas for (83) agents, and Houston for (88) agents
 - Reno Tahoe Territory Meeting in Genoa 10/12
 - High Sierra Visitor Council annual meeting 10/21
 - Visit California Luxury Forum 10/23-10/25 with (40) buyers
 - Podcast interview: The Home Based Travel Agent Show on 10/26
 - Australia rep firm Gate 7 conducted training with itravel for (50) agents
 - Outdoor Media Summit 10/30 - 11/1

- Key Projects:
 - Newsletter sent 10/26 to 2,791 travel agents and travel product managers saw 31% open rate
 - Scheduled NLT leisure destination webinar for 11/8
 - Planning FAM for National Tour Association 11/13

October 2022 Monthly Report



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October Executive Summary – Consumer Campaign

- October ran an additional 6M impressions since September. Major platforms such as Travelzoo and Rich Media began running in October, increasing spend from the month prior.
- TOS 115 conversions climbed by an incredible 328% to a total of 9,048 in October. Proportionally, cost per conversion dropped by \$16.52, a 64% decrease in cost since September.
- Millennial Megan creative was the most successful in driving impressions and clicks. Video content also led to high CTR, especially in regard to Instagram Stories.
- Google Performance Max accounts for 73% of all TOS 115 conversions (6,612). As a display placement, Google Max proved a top performer followed by programmatic display at 339 conversions.



October Executive Summary – National Paid Search Campaign

- The national Google paid search campaign continued into September focusing on “Lake Tahoe” keywords. Keywords were broken out into four campaigns to include “Stay,” “Plan,” “Dine” and “Play” in correlation with site structure and searches.
- Each ad group had similar impressions, but “Dine” outperformed all others with an incredible CTR of 12.8%.
- The campaign captured a 11.2% CTR, an increase of more than 0.3% from September and well above the industry average of 8.54%.



September Executive Summary – MCC Campaign

- Meetings earned an additional 282 clicks than the month prior and slightly increased the CTR. This increase in CTR of 6%, compared to a 10% increase in September, signals a rise in engagement with the creative. Meetings earned 99 more TOS conversions.
- While Social clicks rose 9%, total TOS conversions fell by 7 to a total of 48. This indicates interest in the message but potentially less action – likely due to time of year.
- Social creative earned an additional 139 clicks from last month.
- The Instagram video platform is the most likely to hold audience attention until the end of the 15s video. Completion rates on platform, 6.12%, were often 6 times higher than other channel completion rates.



October Executive Summary - Website

- There were over 89K visitors to GoTahoeNorth.com in October. This was a 6.9% decrease from September with the majority of traffic coming from Paid Search (45.9%).
- The average session duration was 0:55 (industry average is 1 minute). New users decreased by 8.3% and sessions were also down by 3.8% when comparing MoM and +57% and +69.9% comparing YoY.
- Top locations were similar to previous months and in line with paid media campaign target markets, including Los Angeles driving the most visitors to the site than any other city.
- The homepage was a top driver of traffic followed very closely behind by the fall activities page and Lake Tahoe activities page.



October Executive Summary - Content

- There were two blogs this month which spoke to fall and winter activities in North Lake Tahoe.
- One enewsletter deployed yielding a high open rate of 27.7% (industry average is 16%). It featured a section on dog-friendly food and lodging in the region, fall foliage and Made in Tahoe event promotion.
- CrowdRiff metrics decreased this month, but still had a high engagement rate of 40%. Top content featured fall and snow imagery.



October Executive Summary – PR Coverage

- Secured seven clips with 4.5B estimated digital monthly visits and 3.7M estimated digital coverage views. Secured five TV segments with estimated views of 126.9K that was broadcast ten times throughout Oct. 29.
- Pitching efforts focused on best places to kayak for fall color, winter travel ideas, where to celebrate Nevada Day in North Lake Tahoe, fire prevention month and fire prevention week, best mansions to tour in the U.S., where to ski in North Lake Tahoe, sober travel destinations, ultimate family getaways, meetings in North Lake Tahoe, accessibility in North Lake Tahoe, where to get the most unbelievable views of North Lake Tahoe, best via ferrata in the U.S. destinations to visit in 2023 and a thought leadership pitch focused on how North Lake Tahoe is leading sustainable travel.
- Augustine also collaborated on several articles, including one with *LA Times*, highlighting the 22/23 ski season, began to coordinate spring FAM tours, and represented North Lake Tahoe at the Outdoor Media Summit.



October Executive Summary – Organic Social Media

- Social content focused on the transition to fall in the region, seasonal events and branded challenges.
- There were 1.7M impressions and 13K post clicks.
- The average engagement rate was 5% (average 1%) an increase of 35% MoM. This is a positive indicator that our social content is resonating well with our target audiences.



A scenic view of a lake with a kayaker and a semi-transparent text box. The background shows a person in a kayak on a clear, turquoise lake. The water is crystal clear, revealing large, smooth rocks at the bottom. The shoreline is lined with lush green trees. A semi-transparent white rectangular box is overlaid on the center of the image, containing the text "Paid Media" in a bold, dark blue font.

Paid Media

Consumer Paid Media Executive Summary

- October ran an additional 6M impressions since September. Major platforms such as Travelzoo and Rich Media began running in October, increasing spend from the month prior. In addition, October ran 5 weeks compared to September's 4 weeks, which pulls more spend and impressions due to the extra calendar week.
 - Millennial Megan led with the highest number of social TOS conversions (794) followed by Boomer Ben (225) and The Jones Family (155). Note: Retargeting earned 75 conversions compared to September's 47.
- Metrics showed strong increases compared to the month prior. Overall clicks jumped by more than 40,000, CTR increased by .04% and CPC dopped by 51 cents.
- TOS 115 conversions climbed by 328% to a total of 9,048 in October. Proportionally, cost per conversion dropped by \$16.52, a 64% decrease in cost since September.
- Google Performance Max accounts for 73% of all TOS 115 conversions (6,612). As a display placement, Google Max proved a top performer followed by programmatic display at 339 conversions.



Consumer Paid Media Recommendations

- Google Max performed strongly in October. Will continue to monitor and optimize to maintain the strong positive trend.
- Paid Search's Stay campaign performed below other search campaign averages. Optimizations underway to adjust keywords and targeting.
- Booking local radio and *Visit California Visitor's Guide* for Sustainability campaign support.
- Optimize video campaigns to boost performance across TOS 115 conversions and lower CPMs.
 - Optimize YouTube to with the goals of increasing clicks similar to levels of Facebook. This includes optimizations of creative rotation, audience scaling and targeting.



MCC Paid Media



MCC Paid Media Executive Summary

- October spend was \$120 less than September, closer to August's spend. Meetings earned an additional 282 clicks than the month prior and slightly increased the CTR. This increase in CTR of 6%, compared to a 10% increase in September, signals a rise in engagement with the creative. Meetings earned 99 more TOS conversions and spend was \$23 less per conversion than last month.
- While Social clicks rose 9%, total TOS conversions fell by 7 to a total of 48. This indicates interest in the message but potentially less action – likely due to time of year.
- Social creative earned an additional 139 clicks from last month. Video completion rates increased 14 points to a 38% completion rate. Video CTR also climbed, CTR increased 28% to 0.46%, cost 26 cents less and earned 72 more TOS conversions than September. Optimizations to video platforms dropped cost per conversion by \$45.
- The Instagram video platform is the most likely to hold audience attention until the end of the 15s video. Completion rates on platform, 6.12%, were often 6 times higher than other channel completion rates.



MCC Paid Media Recommendations

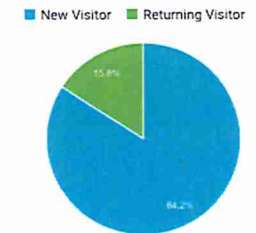
- New NLT Meetings ads rotated in on the Social platforms in October. Fresh creative positively impacted performance. Will continue to optimize and monitor the new Display and Social creatives.
- Display's Retargeting creative earned the most TOS conversions and served 5 times the number of impressions as any other single Meetings creative line.
 - Consider consolidating the 4 Meetings creatives to 2 to increase number of impressions delivered to the higher-performing creative like Audio-Visual.
- Will examine metrics behind the high-performing video platforms (Facebook & LinkedIn for CTR and costs per click) to inform optimizations on other platforms such as YouTube.



An aerial photograph of a person in a red kayak on a vibrant turquoise lake. The water is crystal clear, revealing large, light-colored rocks at the bottom. The shoreline is lined with dense green pine trees. A semi-transparent white rectangular box is overlaid on the center of the image, containing the word "Website" in a bold, dark blue font.

Website

Visitors & Sessions



- There were over 89K visitors to GoTahoeNorth.com. This was a 6.9% decrease from September with the majority of traffic coming from Paid Search (45.9%), due to the targeted “Lake Tahoe” search campaign.
- The average session duration was 0:55 (industry average is 1 minute). New users decreased slightly by 8.3% and sessions also slightly decreased by 3.8% when comparing MoM. YoY, they increased respectively by +57% and +69.9%.



Top Pages Visited

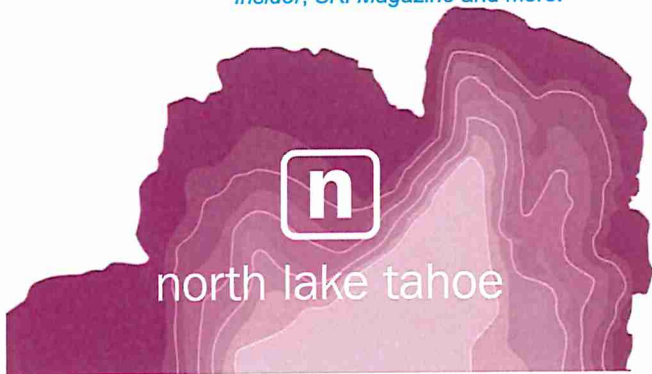
- The Homepage was a top driver of traffic followed very closely behind by the Fall Activities page and Lake Tahoe Activities page.
- Users were most engaged with the Homepage (2:22) followed by Dine (2:17) and Webcams (2:10).
- Demographics were primarily aged 25-44.

Page	Pageviews	Unique Pageviews	Avg. Time on Page
	170,566 <small>% of Total: 100.00% (170,566)</small>	149,623 <small>% of Total: 100.00% (149,623)</small>	00:01:52 <small>Avg for View: 00:01:52 (0.00%)</small>
1. /homepage	67,664 (39.67%)	57,926 (38.71%)	00:02:22
2. /lake-tahoe-activities/fall	13,324 (7.81%)	11,933 (7.98%)	00:01:16
3. /lake-tahoe-activities	3,403 (2.00%)	2,986 (2.00%)	00:01:22
4. /webcams	3,040 (1.78%)	2,726 (1.82%)	00:02:10
5. /lodging	2,808 (1.65%)	2,326 (1.55%)	00:01:35
6. /events	2,677 (1.57%)	2,146 (1.43%)	00:01:16
7. /lake-tahoe-activities/hiking/hiking-trails	2,022 (1.19%)	1,748 (1.17%)	00:01:15
8. /deals	1,730 (1.01%)	1,567 (1.05%)	00:01:22
9. /dine/null/all/least-expensive,moderate	1,617 (0.95%)	1,474 (0.99%)	00:02:17
10. /lodging/vacation-rental/all	1,485 (0.87%)	1,299 (0.87%)	00:01:10



Media Relations Updates

- Proactive Pitch Angles/Media Inquiries:
 - Best Places to Kayak for Fall Color
 - Winter Travel Ideas
 - Where to Celebrate Nevada Day in North Lake Tahoe
 - Fire Prevention Month and Fire Prevention Week
 - Best Mansions to Tour in the U.S.
 - Where to Ski in North Lake Tahoe
 - Sober Travel Destinations
 - Ultimate Family Getaways
 - Meetings in North Lake Tahoe
 - Accessibility in North Lake Tahoe
 - Where to Get the Most Unbelievable Views of North Lake Tahoe
 - Best Via Ferrata in the U.S.
 - Destinations to Visit in 2023
 - Thought Leadership: How North Lake Tahoe is Leading Sustainable Travel
- Highlights: Inclusion in *SnowBrains*, *LA Times*, *Best Life* and more along with a broadcast interview on KCBS.
- Media Conversations:
 - Top-tier outlets like *New York Post*, *AFAR*, *Thrillist*, *USA Today 10 Best*, *Visit California*, *Business Insider*, *SKI Magazine* and more.



**Snow
Brains**

Los Angeles Times

BEST LIFE

thrillist

Earned Media Results

- Secured Clips: 17
- Est. Digital Monthly Visits: 4.5B
- Est. Digital Coverage Views: 3.7M
- Est. Broadcast Audience Reach: 26.9K
- Coverage featured what's new at California ski resorts for the 22/23 season, where to ski in North Lake Tahoe, day trips from Sacramento, best places for fall foliage, best mountain towns, reasons to visit North Lake Tahoe and more.



[Ski Season is Coming. What You Need to Know Before Heading to California's Most Popular Resorts](#)

Los Angeles Times

Ski season is coming. What you need to know before heading to California's most popular resorts

Sugar Bowl



Skiers at the Sugar Bowl Ski Resort in 2017. (Gary Coronado / Los Angeles Times)

Distance from Los Angeles: A seven-hour drive

Projected season opening date: Nov. 25

What makes it special: Sugar Bowl is an independently run resort with an old-school, European vibe. Its terrain stretches over four peaks on Donner Summit near Lake Tahoe, varying between steep tree skiing, wide-open groomers, terrain parks and beginner-friendly zones. Season passes and lift tickets are limited here, so the slopes aren't crowded.

Upcoming PR Initiatives

- Unofficial Networks is working on a mountain biking piece after October FAM tour.
- Continue to partner with Visit California and Travel Nevada for relevant pitching opportunities and story ideas.
- Pitching efforts will focus on thought leadership around sustainability, Après ski, Thanksgiving in North Lake Tahoe, Small Business Saturday, lodging for winter ski trips, national get outdoors week and more.
- Continue to vet media and influencers and coordinate FAM tours for fall and spring trips.



An aerial photograph of a person in a kayak on a vibrant turquoise lake. The water is crystal clear, revealing large, light-colored rocks in the foreground. Lush green pine trees are visible on the right side of the frame. A semi-transparent white rectangular box is overlaid on the center of the image, containing the text "Social Media" in a bold, dark blue font.

Social Media

Facebook Overview

Data	September	October	MoM
Audience	131,295	131,258	-
Impressions	2,347,325	1,397,849	-16.1%
Engagement	91,005	71,784	-59.3%

- Facebook content promote fall activities in the region. There were 1.3M impressions and 13K post clicks. While there were decreases in overall impressions and engagements, there was a significant increase in the overall engagement rate per impression by 32%. The average engagement rate was 5.1% (average 0.9%).
- The most engaged audience was women ages 35-44. The highest reached locations included Los Angeles, Reno and Sacramento.



Facebook Top Posts

- Top posts included various seasonal highlights from fall leaves to holiday content.
- The post with the highest engagements featured a drone view of fall in the region. This post generated an 8.3% engagement rate.
- The team continued to share a mix of lifestyle, scenic and event content.



n North Lake Tahoe
Fri 10/7/2022 5:30 pm PDT

There's no place like Ta-home. Come up to North Lake Tahoe this fall and enjoy clear blue skies, crisp morning air, and a range of autumn colors. Have the place to yourself mid-week. Pro tip - it's...

Total Engagements	5,545
Reactions	4,013
Comments	165
Shares	343
Post Link Clicks	41
Other Post Clicks	983

n North Lake Tahoe
Wed 10/12/2022 5:48 pm PDT

Lose yourself in the panoramic views of North Lake Tahoe and breathtaking fall air. 🍂📷 <https://fal.cn/3sGEk> 📍 itsborissss

Total Engagements	468
Reactions	271
Comments	8
Shares	12
Post Link Clicks	11
Other Post Clicks	166

n North Lake Tahoe
Mon 10/31/2022 2:13 pm PDT

Wishing everyone a spooky good time. Happy Halloween from North Lake Tahoe. 🎃👻 @nickcmah0n

Total Engagements	426
Reactions	344
Comments	5
Shares	33
Post Link Clicks	—
Other Post Clicks	44

Instagram Overview

Data	September	October	MoM
Audience	83,742	83,580	-0.1%
Impressions	266,512	318,754	+19.5%
Engagement	8,600	14,588	+139%




- Instagram content promoted fall activities in the region.
- The NLT + Me contest ran through October, generating engagement on the platform.
- Content generated over 318K impressions and 14K engagements.
- The most reached audience was women aged 25-44. The highest reached locations included Reno, Sparks and San Francisco.



Instagram Top Posts

- Top posts included Reels featuring snow and lakeside scenic views.
- Instagram content generated an overall engagement rate of 4.6% across all posts (benchmark 0.98%).
- North Lake Tahoe's Instagram audience continued to engage daily with story and mention tags showcasing activities.



Post Content	Total Engagements	Likes	Comments	Shares	Saves
<p>tahoenorth Tue 10/25/2022 4:45 pm PDT</p> <p>When snow meets the region during fall 🌨️❄️ (Captured on Saturday, October 22nd)</p> 	5,342	4,679	25	578	60
<p>tahoenorth Fri 10/14/2022 3:58 pm PDT</p> <p>Our little slice of heaven 🍷</p> 	2,399	2,186	14	147	52
<p>tahoenorth Fri 10/7/2022 5:32 pm PDT</p> <p>You've arrived at your destination. ✨ The beautiful fall weather is a great reason to explore the region...</p> 	1,057	1,027	6	24	

NLT + Me

- Augustine completed the NLT + Me social media challenge.
- The contest generated 34 entries, with North Lake Tahoe social fans posting photos and videos to join in on the challenge.
- The selected winner posted 14 photos all promoting sustainability in the region.



Twitter Overview

Data	September	October	MoM
Audience	23,785	23,752	-0.1%
Impressions	8,188	3,173	-58.2%
Engagement	291	63	-76.8%

- Content continued to highlight news, safety updates and local events in the region.
- In September, Twitter saw high engagement last month due to fire safety updates. Due to a lack of newsworthy content, this month saw a decline MoM.



Twitter Top Posts

- Top Twitter post featured the Halloween post.
- Other top posts featured regional events and NLT challenge copy.
- Augustine will continue to promote relevant content on Twitter.



@TahoeNorth
Mon 10/31/2022 9:17 pm UTC

Wishing everyone a spooky good time. Happy Halloween from North Lake Tahoe. 🎃👻 [nickmcmah0n https://t.co/mdhJ01Bh3Q](https://t.co/mdhJ01Bh3Q)

Total Engagements	30
Likes	14
@Replies	2
Retweets	5
Post Link Clicks	—
Other Post Clicks	9
Other Engagements	0

@TahoeNorth
Wed 10/5/2022 12:29 am UTC

Celebrate all things LOCAL this fall with the return of the Made in Tahoe Festival on October 8th & 9th. Enjoy live entertainment, music, food & of course beer! 🍷 <https://t.co/VOgyFuF9lg...>

Total Engagements	21
Likes	6
@Replies	0
Retweets	1
Post Link Clicks	4
Other Post Clicks	10
Other Engagements	0

@TahoeNorth
Thu 10/27/2022 11:32 pm UTC

Join our NLT challenge. Whether you love the active outdoors, actively pursue the latest scenic restaurants or just want to make the world a better place, we have a challenge for you. Visit our...

Total Engagements	4
Likes	1
@Replies	0
Retweets	0
Post Link Clicks	3
Other Post Clicks	0
Other Engagements	0

CA Now Story

- Augustine continued to create California Now stories via CrowdRiff.
- The top story this month featured biking in North Lake Tahoe, with a 37% completion rate (benchmark 34%) and a CTR of 6.82% (benchmark 5.5%).
- Augustine will continue to build monthly stories with seasonal and evergreen content.



An aerial photograph of a person in a kayak on a clear, turquoise lake. The water is so clear that the rocky bottom and submerged logs are visible. The shoreline is lined with large, smooth rocks and dense evergreen trees. The scene is peaceful and scenic.

Other Creative Projects

Creative Projects

- Winter Campaign – developing creative to launch mid-November.
- Audited MCC campaign for best performing creative, developed new creative and will launch in October.
- Feature blogs in November for free activities to do in the region and activities to do with young children.
- Continuing CA Now Stories for blogs and relevant Visit California topics with themes of accommodations.
- Continuing to deploy enewsletters to consumer, leisure and MCC audiences.



An aerial photograph of a person in a red kayak on a vibrant turquoise lake. The water is crystal clear, revealing large, light-colored rocks at the bottom. Lush green pine trees are visible along the shoreline on the right. A semi-transparent white rectangular box is overlaid on the center of the image, containing the text "Industry Insights" in a bold, dark blue font.

Industry Insights

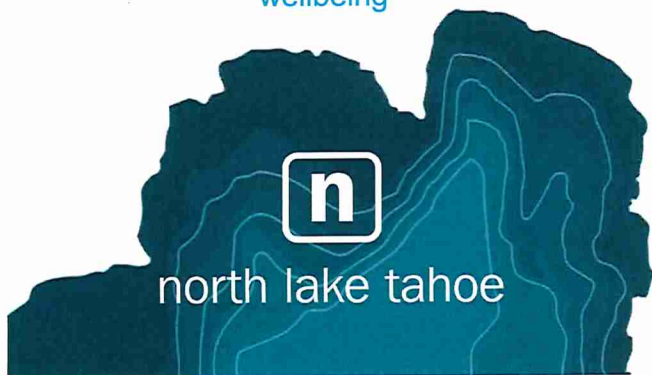
Industry Insights

- A recent study Amex showed a number of findings from 2022 and trends for 2023:
 - Travel Sentiment:
 - 88% of respondents agree that they wish that their trips and travel experiences could be longer
 - 70% of respondents want to travel to wish list destinations in 2023
 - 50% of respondents have already started to think about where they want to go on their upcoming summer 2023 vacations
 - 81% of respondents agree they want to feel a sense of adventure at their next travel destination



Industry Insights

- Generational Findings:
 - 56% of Gen Z and Millennials say they turn to social media for travel destination inspiration
 - 43% of Gen Z and Millennials say it's likely they will ask a professional travel expert for help planning their upcoming 2023 vacations
 - 69% of respondents agree they are seeking to travel to unique destinations they haven't been to in 2023
- Wellness
 - 89% of respondents agree they want to go on a trip to escape routine
 - 74% of respondents agree they plan to travel more in 2023 for their wellbeing
 - 53% of respondents agree they are more likely to book a hotel with wellness activities (i.e., outdoor fitness activities, healthy food options)
 - 49% of respondents agree they seek out activities like spa treatments and meditation sessions to improve their wellbeing





THANK YOU



Reno-Tahoe International Airport

Passengers and Cargo Statistics Report

October 2022



U.S. Domestic Industry Overview - October 2022

Systemwide RNO Airlines Domestic Flights – year over year comparison

Number of Flights *:	Down 0.1% vs. Oct 2021, down 14.0% vs. Oct 2019
Capacity of Seats *:	Up 5.7% vs. Oct 2021, down 5.1% vs. Oct 2019
Crude Oil Average:	\$87.55 per barrel in Oct 2022 \$81.48 per barrel in Oct 2021

RNO Overview - October 2022

RNO Overview for October 2022 vs. October 2021

Total Passengers:	up 9.9%
Avg. Enplaned Load Factor:	84.2%, up 7.9 pts.
Departures:	Down 13.1%
Departing Seats:	Down 0.7%
Cargo Volume:	Down 17.0%

RNO Overview for October 2022 vs. October 2019

Total Passengers:	Up 1.2%
Avg. Enplaned Load Factor:	up 7.1 pts.
Departures:	Down 19.2%
Departing Seats:	Down 8.7%

*Source: Airline Activity and Performance Reports; * Cirium Flight Schedules via Diio mi*

October 2022 SUMMARY

Reno-Tahoe International Airport (RNO) served 385,466 passengers in October 2022, an increase of 9.9% versus October 2021.

In October 2022, RNO was served by 12 airlines to 20 non-stop destinations. The total seat capacity decreased 0.7% and flights decreased 13.1% when compared to October 2021.

RNO handled 10,502,407 pounds of air cargo in October 2022, a decrease of 17.0% when compared to October 2021.

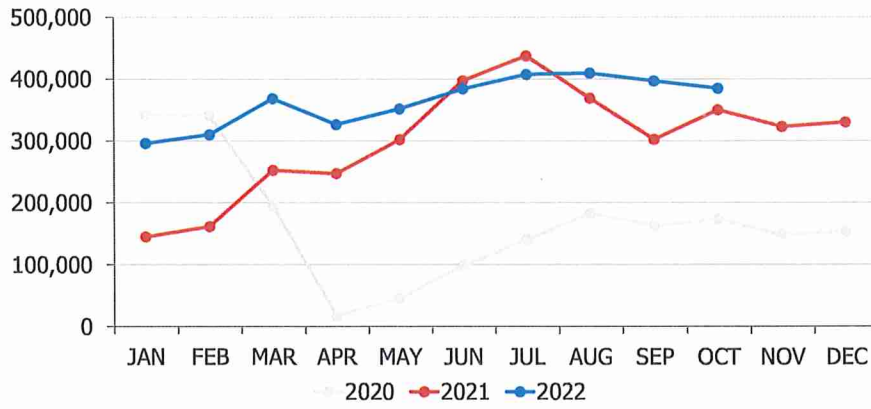
JSX Public Charters

JSX offers non-stop flights from RNO to Las Vegas, Orange County and Burbank using a 30-seat Embraer 135/145 aircraft. JSX operates out of Stellar Aviation, a private Fixed Base Operator, located at 485 South Rock Blvd.

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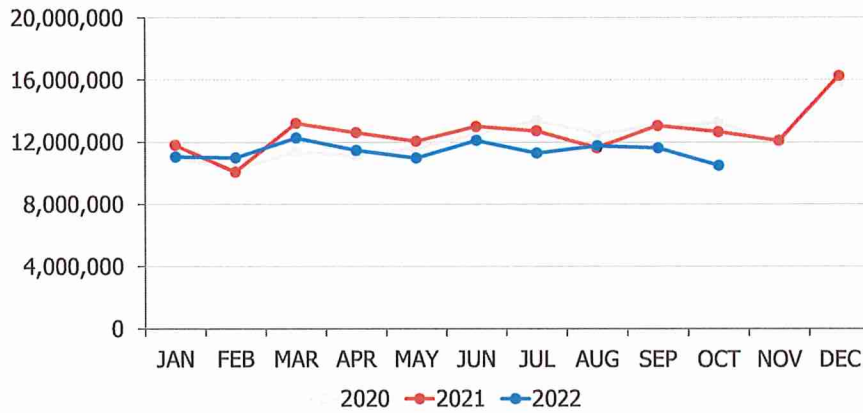


Passengers



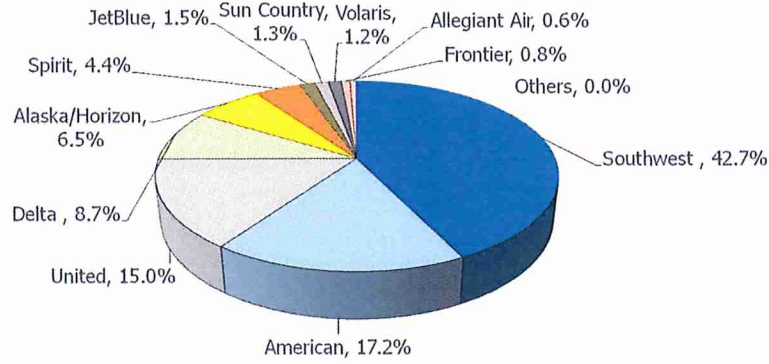
Total Passengers			
	Oct-22	Oct-21	Difference
aha!	0	249	
Alaska/Horizon	25,007	36,484	-31.5%
Allegiant Air	2,301	6,285	-63.4%
American	66,471	71,880	-7.5%
Delta	33,646	33,616	0.1%
Frontier	3,201	5,029	-36.3%
JetBlue	5,718	7,235	-21.0%
Southwest	164,549	131,531	25.1%
Spirit	16,808	0	
Sun Country	5,044	0	
United	57,908	51,580	12.3%
Volaris	4,813	4,022	19.7%
Other	0	2,720	

Cargo



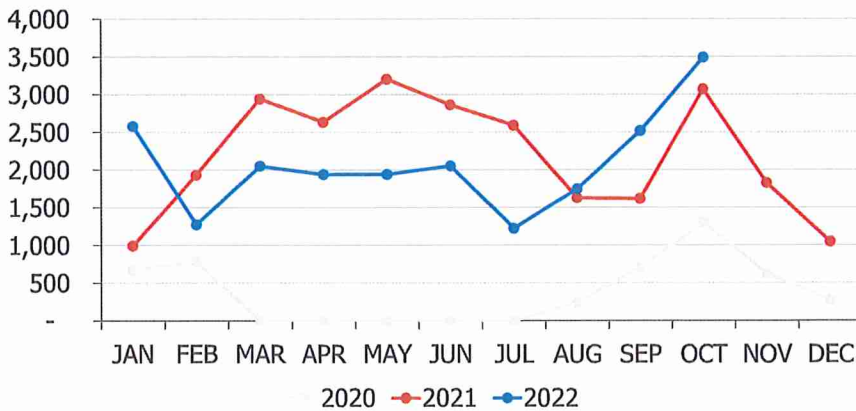
In October 2022, DHL cargo volume was up 31.9% when compared to October 2021. FedEx was down 20.7% and UPS was down 16.3% during the same period.

AIRLINE MARKET SHARE (passengers)



Airline Market Share			
	Oct-22	Oct-21	YOY Change
aha!	n/a	0.1%	n/a
Alaska/Horizon	6.5%	10.4%	(3.9)
Allegiant Air	0.6%	1.8%	(1.2)
American	17.2%	20.5%	(3.3)
Delta	8.7%	9.6%	(0.9)
Frontier	0.8%	1.4%	(0.6)
JetBlue	1.5%	2.1%	(0.6)
Southwest	42.7%	37.5%	5.2
Spirit	4.4%	n/a	n/a
Sun Country	1.3%	n/a	n/a
United	15.0%	14.7%	0.3
Volaris	1.2%	1.1%	0.1
Others	0.0%	0.8%	(0.8)

TOTAL CHARTER PASSENGERS

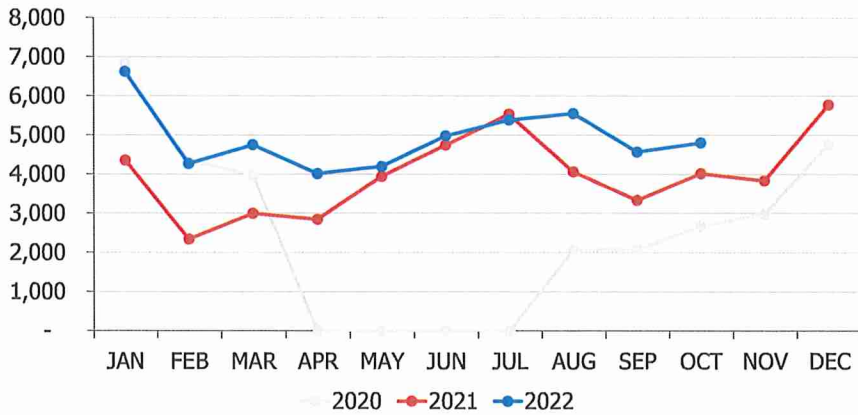


In October 2022, RNO served 3,491 passengers on charter flights, an increase of 13.7% when compared to October 2021.

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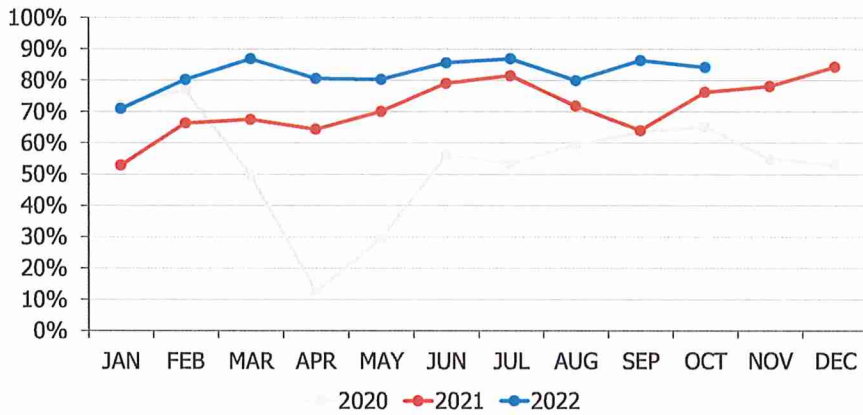


TOTAL INTERNATIONAL PASSENGERS

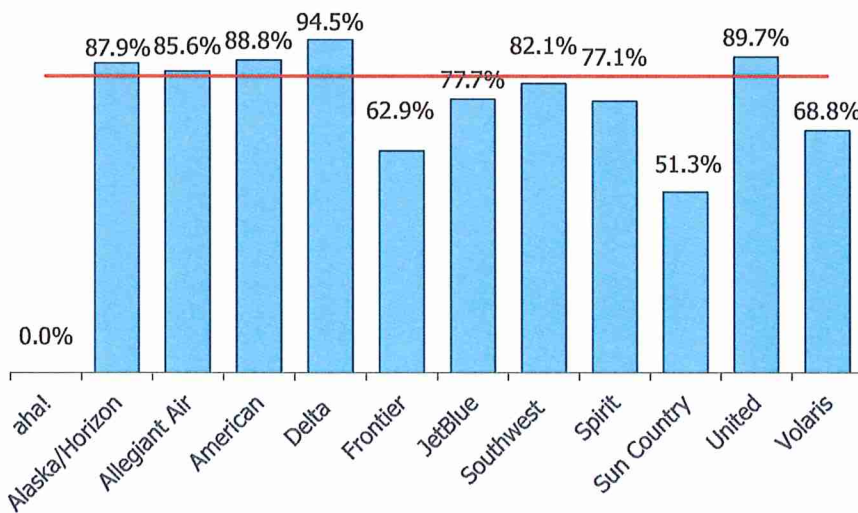


In October 2022, RNO served 4,813 international passengers, an increase of 19.7% when compared to October 2021.

AVERAGE ENPLANED LOAD FACTOR



In October 2022, RNO's average enplaned load factor was 84.2%, an increase of 7.9 pts. versus October 2021.

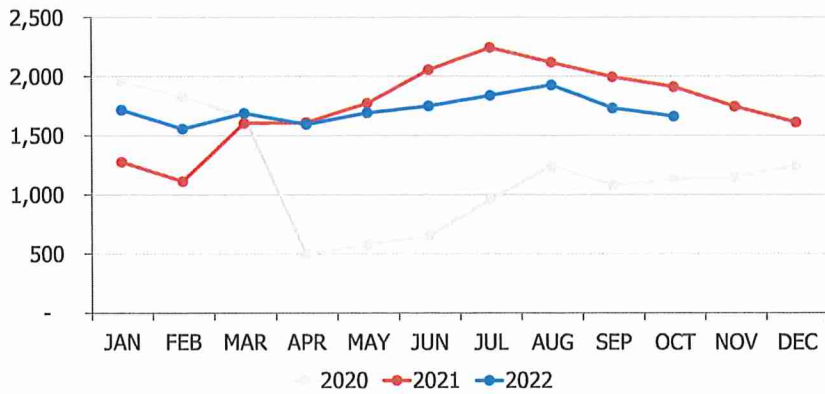


The red horizontal line on the left represents RNO's average enplaned load factor.

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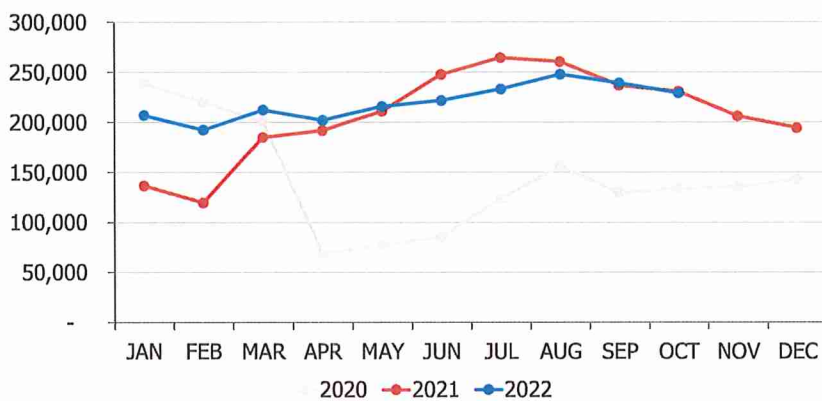


DEPARTURES



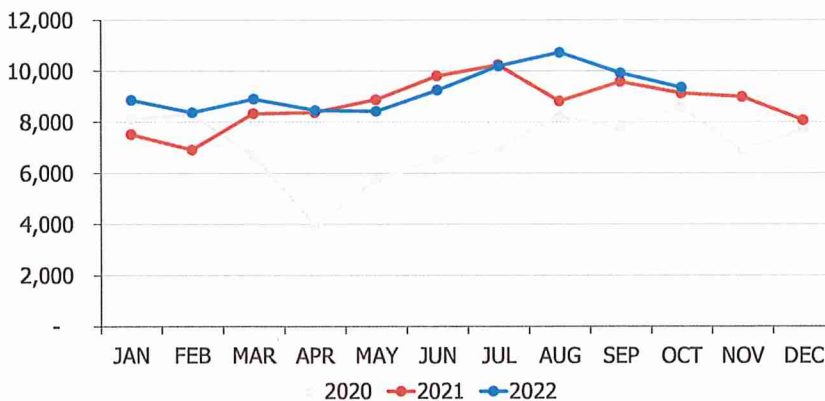
In October 2022, RNO handled 1,664 departures, a decrease of 13.1% when compared to October 2021.

DEPARTING SEATS



In October 2022, RNO offered 229,258 departing seats, a decrease of 0.7% when compared to October 2021.

TOTAL OPERATIONS



A total of 9,354 operations were handled at RNO in October 2022, an increase of 2.5% when compared to October 2021. Total operations include: Air Carrier, Air Taxi, General Aviation and Military operations as reported by the FAA.

December 2022 RNO Flight Schedule

Destination	Airlines	Total Departures	Details
Austin	American	48	Daily 1-14, Twice daily 15-31
Burbank	Southwest	26	Daily. No flight on Sat
Dallas-Love	Southwest	8	Flights on 21-23, 26-30
Dallas/Fort Worth	American	93	Three daily
Denver	Southwest	76	Two to three daily
	United	108	Three daily 1-14, Four daily 15-31
Guadalajara	Volaris	22	Five weekly. Mon - Fri
Houston-Intercontinental	United	16	Daily 15-30
Las Vegas	Allegiant	11	Twice weekly Thu, Sun
	Frontier	21	Five weekly Mon, Tue, Wed, Fri, Sat
	Southwest	275	Nine to 10 daily. Five flights on Sat
	Spirit	62	Twice daily
Long Beach	Southwest	57	Twice daily. Once on Sat
Los Angeles	Delta	90	Three daily
	JetBlue	22	Four to five weekly
	Southwest	57	Twice daily. Once on Sat
	United	31	Daily
New York-JFK	JetBlue	14	Daily 17-31
Oakland	Southwest	57	Twice daily. Once on Sat
Orange County	Southwest	8	Flights on 21-23, 26-30
Phoenix	American	90	Three daily
	Southwest	62	Twice daily
Portland	Alaska	53	One to two flights a day
Salt Lake City	Delta	84	Two to three daily
San Diego	Southwest	62	Twice daily
San Francisco	United	102	Three to four daily
San Jose	Southwest	31	Daily
Seattle	Alaska	79	One to four daily

Multiple airlines in a market

11.30.2022

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Total Passengers Oct-22						
	Passengers		% Diff.	Passengers		YOY % Diff.
	2020	2021		2022		
JAN	342,796	145,421	-57.6%	296,641	104.0%	
FEB	341,935	162,071	-52.6%	310,738	91.7%	
MAR	194,796	252,828	29.8%	368,946	45.9%	
1st QTR	879,527	560,320	-36.3%	976,325	74.2%	
APR	17,265	247,220	1331.9%	326,787	32.2%	
MAY	46,015	302,403	557.2%	352,255	16.5%	
JUN	98,619	397,906	303.5%	384,429	-3.4%	
2nd QTR	161,899	947,529	485.3%	1,063,471	12.2%	
JUL	140,986	438,168	210.8%	407,867	-6.9%	
AUG	183,343	369,686	101.6%	409,942	10.9%	
SEP	164,103	302,929	84.6%	397,404	31.2%	
3rd QTR	488,432	1,110,783	127.4%	1,215,213	9.4%	
OCT	173,682	350,631	101.9%	385,466	9.9%	
NOV	148,777	323,508	117.4%			
DEC	154,103	330,687	114.6%			
4th QTR	476,562	1,004,826	110.8%			
TOTAL	2,006,420	3,623,458	80.6%			
YTD		2,969,263		3,640,475	22.6%	

Total Enplaned Passengers Oct-22				
Month	2020	2021	2022	% Diff.
JAN	172,452	72,887	147,773	102.7%
FEB	170,067	80,263	155,233	93.4%
MAR	99,986	126,359	185,671	46.9%
APR	8,690	125,009	163,973	31.2%
MAY	22,807	149,486	174,487	16.7%
JUN	48,274	197,261	191,234	-3.1%
JUL	66,039	217,124	203,375	-6.3%
AUG	93,015	188,207	199,365	5.9%
SEP	82,844	152,267	206,819	35.8%
OCT	87,379	177,407	193,074	8.8%
NOV	74,910	161,926		
DEC	76,164	164,561		
TOTAL	1,002,627	1,812,757		
YTD		1,308,863	1,821,004	39.1%

Total Deplaned Passengers				
Month	2020	2021	2022	% Diff.
JAN	170,344	72,534	148,868	105.2%
FEB	171,868	81,808	155,505	90.1%
MAR	94,810	126,469	183,275	44.9%
APR	8,575	122,211	162,814	33.2%
MAY	23,208	152,917	177,768	16.3%
JUN	50,345	200,645	193,195	-3.7%
JUL	74,947	221,044	204,492	-7.5%
AUG	90,328	181,479	210,577	16.0%
SEP	81,259	150,662	190,585	26.5%
OCT	86,303	173,224	192,392	11.1%
NOV	73,867	161,582		
DEC	77,939	166,126		
TOTAL	1,003,793	1,810,701		
YTD		1,309,769	1,819,471	38.9%

Total Cargo Volume in Pounds Oct-22						
	Cargo in Pounds		% Diff.	2022		YOY % Diff.
	2020	2021		Pounds	Metric Tons	
JAN	11,008,444	11,805,228	7.2%	11,052,383	5,012	-6.4%
FEB	10,266,728	10,068,001	-1.9%	10,991,076	4,985	9.2%
MAR	11,356,256	13,204,912	16.3%	12,265,793	5,563	-7.1%
1st QTR	32,631,428	35,078,141	7.5%	34,309,252	15,560	-2.2%
APR	11,090,789	12,611,682	13.7%	11,470,613	5,202	-9.0%
MAY	11,613,489	12,048,247	3.7%	10,966,757	4,974	-9.0%
JUN	12,488,906	13,000,085	4.1%	12,105,721	5,490	-6.9%
2nd QTR	35,193,184	37,660,014	7.0%	34,543,091	15,666	-8.3%
JUL	13,387,102	12,722,035	-5.0%	11,289,066	5,120	-11.3%
AUG	12,563,172	11,636,003	-7.4%	11,751,228	5,329	1.0%
SEP	13,014,081	13,055,518	0.3%	11,624,360	5,272	-11.0%
3rd QTR	38,964,355	37,413,556	-4.0%	34,664,654	15,721	-7.3%
OCT	13,281,548	12,660,541	-4.7%	10,502,407	4,763	-17.0%
NOV	11,988,995	12,089,489	0.8%			
DEC	15,834,177	16,260,767	2.7%			
4th QTR	41,104,720	41,010,797	-0.2%			
TOTAL	147,893,687	151,162,508	2.2%			
YTD		122,812,252		114,019,404	51,709	-7.2%

Enplaned Passengers & Load Factor				
Airline	Enplaned PAX	Oct-22	Oct-21	Diff.
aha!	0	n/a	31.3%	n/a
Alaska/Horizon	12,480	87.9%	75.7%	12.2
Allegiant Air	1,202	85.6%	61.1%	24.5
American	33,454	88.8%	78.6%	10.2
Delta	16,907	94.5%	74.2%	20.3
Frontier	1,473	62.9%	79.5%	-16.6
JetBlue	2,953	77.7%	47.3%	30.4
Southwest	82,217	82.1%	76.9%	5.2
Spirit	8,555	77.1%	n/a	n/a
Sun Country	2,480	51.3%	n/a	n/a
United	28,767	89.7%	84.2%	5.5
Volaris	2,586	68.8%	70.0%	-1.2

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north lake tahoe

Chamber | CVB | Resort Association

North Lake Tahoe Visitor Information Center Visitor Report: Oct 2022

VISITORS SERVED:

Sep 2022

Total TC & KB Walk-ins 4,507
Total Phone Calls: 183
Total 4,690

Oct 2021

Total TC & KB Walk-ins 2,253
Total Phone Calls: 160
Total 2,413

Oct 2022

Total TC&KB Walk-ins: 3,511
Total Phone Calls: 159
Total 3,670

REFERRALS GIVEN TO VISITORS:

Restaurants 243	Lodging 19	Historic / Museum 121	Events 73
Tours 18	Surrounding Towns (SLT / Truckee) 83	Retail 100	Transportation 28
Services –Weather, bathroom, events etc 625	Activities Mountain / Trails 369	Activities / Lake 243	Maps / Directions 661

TOTAL 2,583 = 83 referrals per day

October Highlights

- Year to Date: Visitor Center, Kings Beach and Farmers market increased business and activity referrals 66% over 21/22
- Our department (The Visitor Center, KB and Event) referrals averaged 173/day YTD
- Visitor Center visitors up 40% YTD
- Participated with booth at Made at Tahoe Event – had over 50 people take the “Travelers Responsibility Pledge”
- Advertised Mo’s Octoberfest and Crawfish Feed
- Added Romi as a monthly artist
- Added 1 new local vendor: Beary Tahoe, Tahoe Children’s book by local author
- Most incoming calls and emails were asking questions on the best places to see Fall colors
- Had several busses from Reno stop by the Visitor Center and Fanny Bridge during their tour around the Lake