

# 2022-23 Spring Media Proposal



north lake tahoe



# Key Strategies: Spring



## Promote Sustainability Messaging

Finish running Nevada Travel print insertion through April  
Adjust messaging levels to Spring activities as snow melts



## Seasonality focus during Spring/Fall.

Spring spend constitutes 40% of yearly spend  
Heavy up media spend beginning of March/April  
Build flexibility into CTV and video buys to account for the end of ski season



## Visitation data from Datafy used to guide decisions.

Target markets  
Media channels  
Audience segments, persona's, etc



## Refresh audience and creative value

Millennial vs Jones Family audiences  
Static vs Animated ads  
•KPIs  
•Cost effectiveness



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# DATA COLLECTION



Markets selection were informed through flight data research



Datafy data informed 2-year visitors for the Spring season

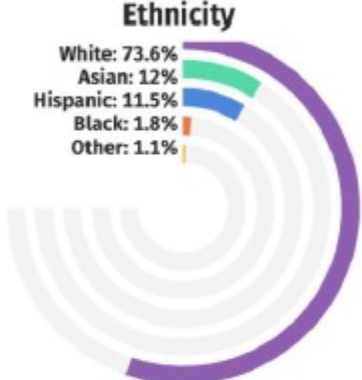
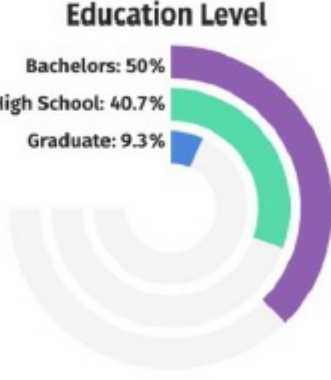
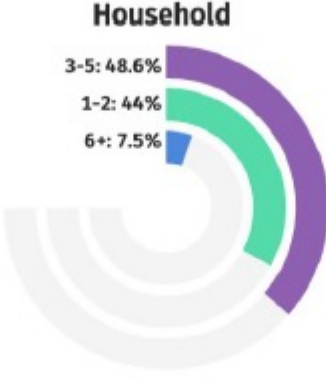
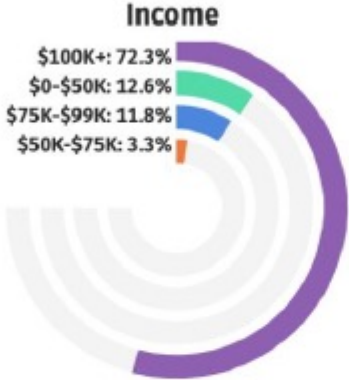
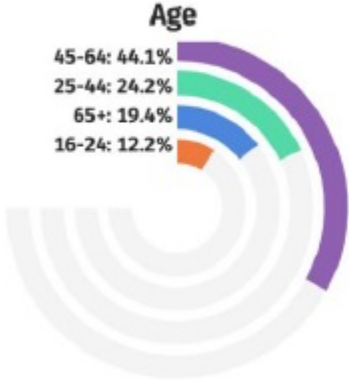


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# Visitation Demographics: Spring 2022

## Demographics for 3/1/22 - 5/15/22



**Visitors to North Lake Tahoe** from 50+ miles  
**POIs:** All POIs available  
**Geo:** DMO Level

*Areas geofenced capture a sample size of devices and are statistically modeled to estimated visitor volumes.*



# Destination Wide Analysis: Spring Compared with Spring 2021

Overview : 3/1/22 - 5/15/22

Total Trips

564,814

↓ -2.0% vs. 3/1/21 - 5/15/21



Visitor Days

1,929,970

↓ -3.1% vs. 3/1/21 - 5/15/21



Average Length of Stay

3.4 Days

↓ -2.9% vs. 3/1/21 - 5/15/21



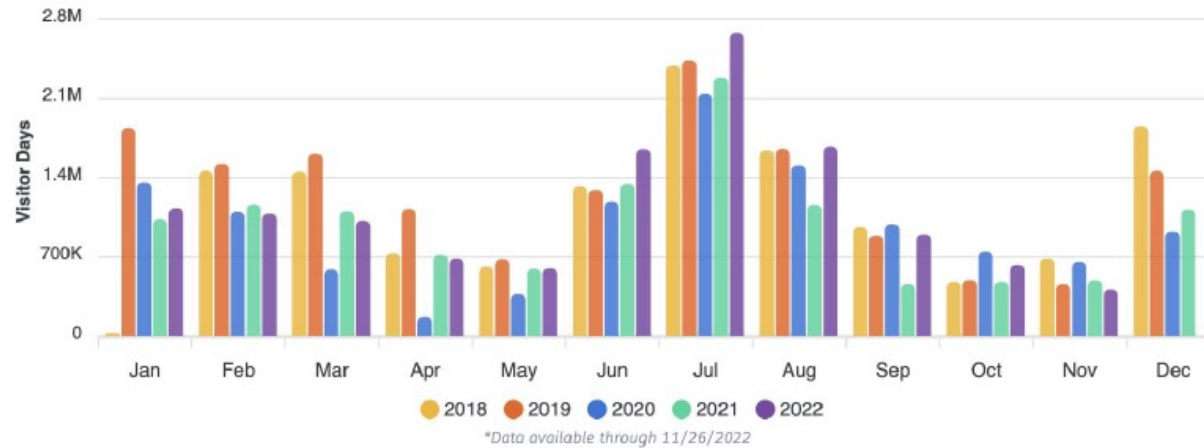
Unique Visitors

346,941

↓ -22.4% vs. 3/1/21 - 5/15/21



## Annual Volume by Visitor Days



Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	26.2K	1.5M	1.5M	732.8K	613.5K	1.3M	2.4M	1.6M	966.2K	478.5K	683.5K	1.9M
2019	1.8M	1.5M	1.6M	1.1M	678.4K	1.3M	2.4M	1.7M	886.1K	494.1K	459.7K	1.5M
2020	1.4M	1.1M	588.9K	168.4K	370.2K	1.2M	2.1M	1.5M	990.0K	748.6K	654.6K	923.0K
2021	1.0M	1.2M	1.1M	718.9K	594.1K	1.3M	2.3M	1.2M	460.1K	478.9K	491.9K	1.1M
2022	1.1M	1.1M	1.0M	684.4K	598.1K	1.7M	2.7M	1.7M	896.2K	626.5K	409.6K	0

## Visitor Days by Length of Stay



Day Trip 40.9%	2 Days 11.2%
3 Days 11.2%	4 Days 9.2%
5 Days 9.9%	6+ Days 17.6%



# Spring Markets: Targeted 2020, 2021 & 2022

## 2020 Markets

- LA
- San Diego
- New York

## 2021 Markets

- LA
- Dallas
- San Diego

### Expanded Markets

- Monterey-Salinas
- Santa Barbara

## 2022 Markets

- LA
- Dallas
- Houston

### Expanded Markets

- Monterey-Salinas
- Fresno

## 2023 Markets

- TBD



# Direct Flights (Non-Stop)

Reno - RNO		
Airport	Total Direct Flights/day	Average Flight Cost
Las Vegas - LAS	14	\$ 294
LA - LAX	11	\$ 221
Phoenix - PHX	6	\$ 334
Denver - DEN	6	\$ 291
SLC - SLC	4	\$ 346
Seattle - SEA	3	\$ 325
San Diego - SAN	2	\$ 148
Chicago - ORD	2	\$ 460
Portland - PDX	1	\$ 198
Dallas - DFW	3	\$ 556
New York - JFK	1	\$ 598
Austin - AUS	1	\$ 568

Sacramento - SMF		
Airport	Total Direct Flights/day	Average Flight Cost
San Diego - SAN	21	\$ 131
Las Vegas - LAS	19	\$ 189
Phoenix - PHX	15	\$ 316
LA - LAX	15	\$ 273
Seattle - SEA	14	\$ 211
Denver - DEN	11	\$ 270
Portland - PDX	7	\$ 210
SLC - SLC	5	\$ 279
Chicago - ORD	4	\$ 491
New York - JFK	1	\$ 478
Dallas - DAL	1	\$ 216
Dallas - DFW	5	\$ 438
Houston - IAH	1	\$ 410
Austin - AUS	1	\$ 194

# All Markets: Spring 2022

## Top Markets

DMA	% of Trips 3/22 - 5/22	% Change of Trips vs 3/21 - 5/21	Total Visitation % Change vs 3/21 - 5/21
San Francisco-Oa...	36.9%	↑ 0.5%	↑ 1.1%
Sacramnto-Stkto...	29.6%	↑ 1.1%	↑ 3.9%
Los Angeles	6.8%	↓ 0.6%	↓ 8.1%
Monterey-Salinas	2.2%	↑ 0.2%	↑ 9.3%
San Diego	2.0%	↓ 0.3%	↓ 14.2%
Chico-Redding	1.7%	↓ 0.1%	↓ 6.6%
Fresno-Visalia	1.2%	↓ 0.1%	↓ 12.9%

## Top Markets

DMA	% of Trips 3/22 - 5/22	% Change of Trips vs 3/21 - 5/21	Total Visitation % Change vs 3/21 - 5/21
Dallas-Ft. Worth	1.2%	↓ 0.1%	↓ 11.2%
Phoenix -Prescott	1.0%	↓ 0.2%	↓ 9.7%
Las Vegas	1.0%	↓ 0.6%	↓ 33.7%
Salt Lake City	0.9%	↓ 0.2%	↓ 14.4%
New York	0.9%	↑ 0.1%	↑ 11.4%
Houston	0.9%	— 0.0%	↑ 3.2%
SantaBarbra-San...	0.8%	↓ 0.2%	↓ 19.0%
Reno	0.8%	↑ 0.2%	↑ 35.6%
Honolulu	0.8%	↑ 0.4%	↑ 78.4%
Denver	0.8%	↓ 0.2%	↓ 18.2%
Chicago	0.8%	— 0.0%	↑ 3.2%





# In-State Only: Spring 2022

## Top Markets

DMA	% of Trips 3/22 - 5/22	% Change of Trips vs 3/21 - 5/21	Total Visitation % Change vs 3/21 - 5/21
San Francisco-Oa...	44.0%	↑ 0.5%	↑ 1.1%
Sacramnto-Stkto...	35.3%	↑ 1.3%	↑ 3.9%
Los Angeles	8.2%	↓ 0.7%	↓ 8.1%
Monterey-Salinas	2.6%	↑ 0.2%	↑ 9.3%
San Diego	2.4%	↓ 0.4%	↓ 14.2%
Chico-Redding	2.0%	↓ 0.1%	↓ 6.6%
Fresno-Visalia	1.4%	↓ 0.2%	↓ 12.9%
Las Vegas	1.2%	↓ 0.7%	↓ 33.7%
SantaBarbra-San...	1.0%	↓ 0.2%	↓ 19.0%
Reno	0.9%	↑ 0.2%	↑ 35.6%
Bakersfield	0.4%	— 0.0%	↑ 9.8%
Palm Springs	0.2%	— 0.0%	↑ 0.7%

## Top POIs

POI	% of Trips 3/22 - 5/22	% Change vs 3/21 - 5/21
Truckee	25.2%	↑ 0.8%
Truckee - California	17.0%	↑ 1.2%
North Lake Tahoe - Califo...	7.0%	↑ 0.4%
Donner Summit	5.0%	↓ 0.1%
Olympic Valley	3.0%	↑ 0.8%
Incline Village	2.8%	↓ 0.5%
Palisades Tahoe	2.7%	↑ 0.7%
North Lake Tahoe - Nevada	2.4%	— 0.0%
Tahoe City	2.2%	↓ 0.5%
Northstar California Reso...	2.1%	↑ 0.3%
Kings Beach	2.1%	↓ 0.4%
Northstar	2.0%	↑ 0.3%
West Shore Lake Tahoe	1.8%	↓ 0.4%
Washesu Peak	1.5%	↑ 0.2%
Boreal Mt. Resort	1.4%	↑ 0.1%



# Out-Of-State Only: Spring 2022

## Top Markets

DMA	% of Trips 3/22 - 5/22	% Change of Trips vs 3/21 - 5/21	Total Visitation % Change vs 3/21 - 5/21
Dallas-Ft. Worth	6.7%	↓ 0.8%	↓ 11.1%
Phoenix -Prescott	5.8%	↓ 0.6%	↓ 9.6%
Houston	5.2%	↑ 0.2%	↑ 3.1%
New York	5.0%	↑ 0.5%	↑ 12.0%
Denver	4.7%	↓ 1.0%	↓ 18.0%
Salt Lake City	4.6%	↓ 0.8%	↓ 15.6%
Chicago	4.5%	↑ 0.2%	↑ 3.6%
Honolulu	4.4%	↑ 2.0%	↑ 79.1%
Seattle-Tacoma	4.0%	↓ 0.7%	↓ 14.7%
Portland- OR	3.5%	↓ 1.0%	↓ 22.1%
Austin	3.2%	↑ 0.6%	↑ 23.6%
Miami-Ft. Lauder...	2.9%	↓ 0.2%	↓ 8.0%
Atlanta	2.9%	↓ 0.2%	↓ 5.3%
Tampa-St. Pete -S...	2.5%	↓ 0.1%	↓ 3.9%
Boston -Manches...	2.4%	↑ 0.6%	↑ 32.1%

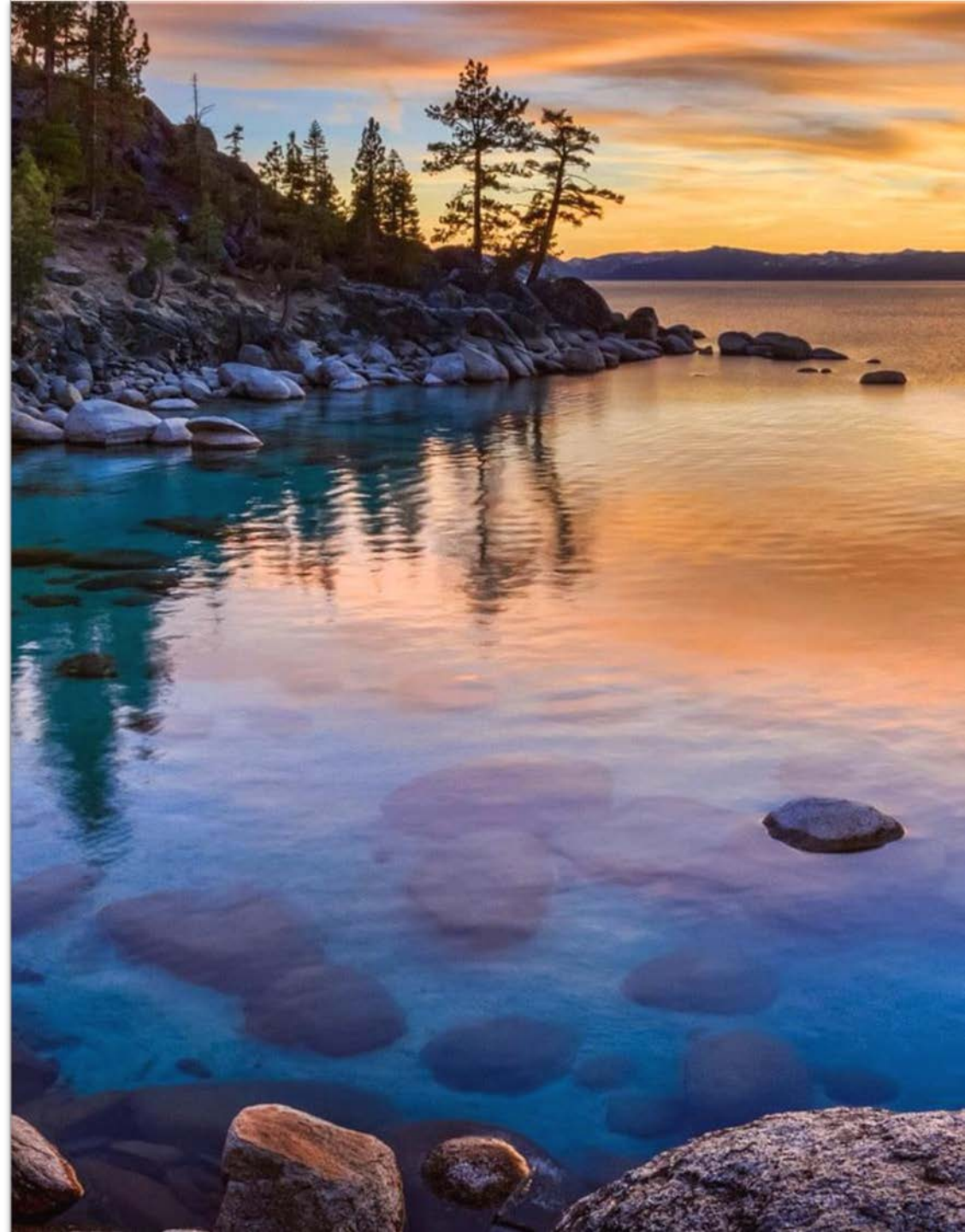
## Top POIs

POI	% of Trips 3/22 - 5/22	% Change vs 3/21 - 5/21
Truckee	24.3%	↓ 3.0%
Truckee - California	15.3%	↓ 2.0%
North Lake Tahoe - Califo...	5.0%	↑ 0.2%
Incline Village	3.5%	↓ 0.9%
Heavenly Mountain Resort	3.3%	↑ 0.8%
North Lake Tahoe - Nevada	3.1%	↓ 0.3%
Donner Summit	3.1%	↓ 0.2%
Kings Beach	2.7%	↑ 0.1%
Tahoe City	2.6%	— 0.0%
Olympic Valley	2.6%	↑ 0.7%
Palisades Tahoe	2.3%	↑ 0.6%
Northstar California Reso...	2.0%	↑ 0.6%
Washesu Peak	1.7%	↑ 0.5%
West Shore Lake Tahoe	1.6%	↓ 0.1%
Northstar	1.6%	↑ 0.4%



# 2023 Target Markets & Audiences

- Option 1 Markets
  - LA
  - New York
  - Phoenix
- Option 2 Markets
  - LA
  - Austin
  - Dallas
  - Houston
- Audiences
  - Millennial Megan
  - The Jones Family
  - Boomer
  - High Value
  - Local/Sustainability





# High Value Visitors

- Length of stay = 4+ nights.
- Includes some mid-week.
- Origin city = any fly market (national).
- Higher spending percentage.



## Visitor Days by Length of Stay

'22 vs '21

Average Length of Stay

**3.4 Days**

↓ -2.9% vs. 3/1/21 - 5/15/21

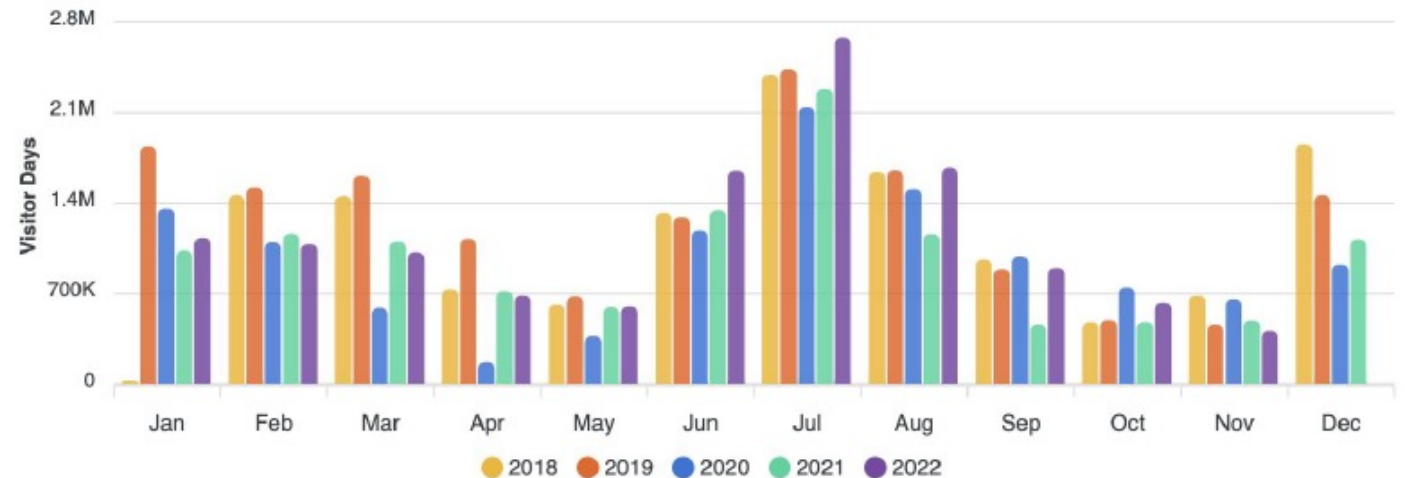
Unique Visitors

**346,941**

↓ -22.4% vs. 3/1/21 - 5/15/21



## Annual Volume by Visitor Days



\*Data available through 11/26/2022

# Consumer Flowcharts



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# Consumer Flowchart – Digital & Social

NLT 2022-23 MEDIA PLAN				4Q 2023													
CAMPAIGN: CONSUMER				March				April				May				Gross Total	
				27	6	13	20	27	3	10	17	24	1	8	15	22	
				Spring													
				40%													
DIGITAL																	
Programmatic Display PT																\$32,399	
Programmatic Display RT																\$7,545	
Native (programmatic)																\$10,172	
Native (direct)																\$26,678	
Paid Search - National																\$20,012	
Google Max (Search, YouTube, Display, Gmail Ads)																\$31,882	
<b>Digital Total</b>																<b>\$128,688</b>	
SOCIAL																	
FB/IG PT																\$17,797	
FB/IG RT																\$6,102	
IG Stories																\$7,738	
Twitter																\$5,000	
<b>Social Total</b>																<b>\$36,638</b>	



# Consumer Flowchart – Video, OTA'S, MISC & Pledge

<b>VIDEO</b>				
OTT.CTV				\$66,663
Facebook Video				\$7,999
TikTok				\$8,451
Youtube Search RT				\$5,001
<b>Video Total</b>				<b>\$88,115</b>
<b>OTA's</b>				
TripAdvisor (Desktop/Mobile/Audience/etc)				\$26,215
<b>OTA's Total</b>				<b>\$26,215</b>
<b>MISC</b>				
Email				\$11,300
Weekend Sherpa (LA)				\$5,085
LA Outdoor				\$112,999
Programmatic Display (High Value / National)				\$9,752
FB/IG (High Value / National)				\$6,893
<b>MISC Total</b>				<b>\$146,029</b>
<b>SUSTAINABILITY/PLEDGE/TART/etc</b>				
FB/IG (In-Market Travelers 75%; Locals 25%)				\$6,441
<b>SUSTAINABILITY/PLEDGE/TART/etc Totals</b>				<b>\$6,441</b>
Adserving				\$497
<b>Total Media Investment</b>	<b>\$197,283</b>	<b>\$114,381</b>	<b>\$70,190</b>	<b>\$432,623</b>

# CREATIVE EXAMPLES




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# 2022 CREATIVE – DUAL DAYS SOCIAL

North Lake Tahoe  
Sponsored · 🌐

No need to choose. Elevate your senses, refresh with Dual Day adventures and enjoy mid-week deals.



GOTAHGENORTH.COM  
**Twice the Excitement**  
Discover Spring's Dual Days


Learn more

Like Comment Share

MILLENNIAL

North Lake Tahoe  
Sponsored · 🌐

Disconnect from daily life and reconnect from the outside in. Find twice the fun and more open spaces mid-week.



GOTAHGENORTH.COM  
**Twice the Relaxation**  
Stay Longer with Specials


Learn more

Like Comment Share

BOOMER

North Lake Tahoe  
Sponsored · 🌐

Explore twice the adventure and twice the family fun with Dual Day adventures in North Lake Tahoe.



GOTAHGENORTH.COM  
**Twice the Smiles**  
Discover Spring's Dual Days


Learn more

Like Comment Share

FAMILY

North Lake Tahoe  
Sponsored · 🌐

Work from nature and get inspired for days. All the best amenities come naturally in North Lake Tahoe.



GOTAHGENORTH.COM  
**Work from Nature**  
Discover Spring's Dual Days


Learn more

Like Comment Share

WORK FROM NATURE

North Lake Tahoe  
Sponsored · 🌐

Recharge after your Dual Days adventure with an overnight stay at one of North Lake Tahoe's unique accommodations.



GOTAHGENORTH.COM  
**Twice the Relaxation**  
Discover Spring's Dual Days


Learn more

Like Comment Share

RETARGETING / LODGING

North Lake Tahoe  
Sponsored · 🌐

Double down safely and responsibly before your Dual Day adventures begin. Download our planning guides now.

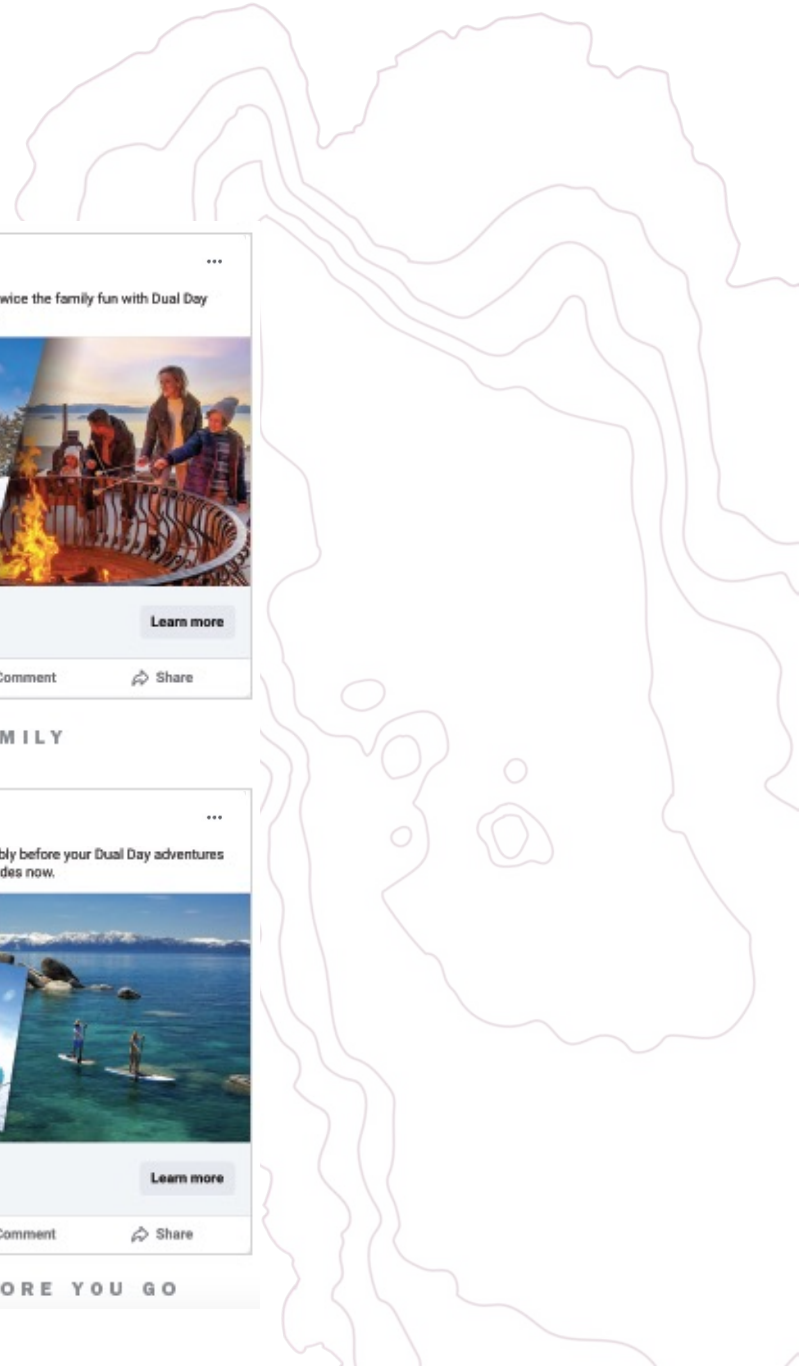


GOTAHGENORTH.COM  
**Twice the Fun**  
Know Before You Go

Learn more

Like Comment Share

KNOW BEFORE YOU GO





# 2022 CREATIVE – DUAL DAYS DISPLAY

HAVE TWICE  
THE FUN

n north lake tahoe  
it's human nature

PLAN NOW

IT'S TIME FOR  
TWICE THE FUN

n north lake tahoe  
it's human nature

PLAN NOW

RECONNECT &  
HAVE TWICE THE FUN

n north lake tahoe  
it's human nature

PLAN NOW

ELEVATE YOUR SENSES &  
UNWIND ON THE LAKE

n north lake tahoe  
it's human nature

BOOK NOW

TRAVEL  
RESPONSIBLY

DOWNLOAD OUR  
KNOW  
BEFORE  
YOU GO  
GUIDES

PLAN NOW

WORK FROM NATURE &  
GET INSPIRED FOR DAYS

n north lake tahoe  
it's human nature

BOOK NOW



# 2022 CREATIVE – DUAL DAYS DISPLAY



SKI BEFORE BRUNCH & KAYAK AFTER LUNCH

**n**  
north lake tahoe  
it's human nature

PLAN NOW

This advertisement features a split image. The top half shows two skiers descending a snowy mountain slope under a clear blue sky. The bottom half shows a man and a woman in blue life jackets paddling a kayak on a calm lake. A green banner with white text is positioned between the two images.



PALISADES TAHOE  
Alpine Meadows, CA

**n**  
north lake tahoe  
it's human nature

PLAN NOW

This advertisement features a split image. The top half shows a skier on a mountain slope. The bottom half shows a skier on a mountain slope. A large, stylized teal topographic map of the region is overlaid on the right side of the image.

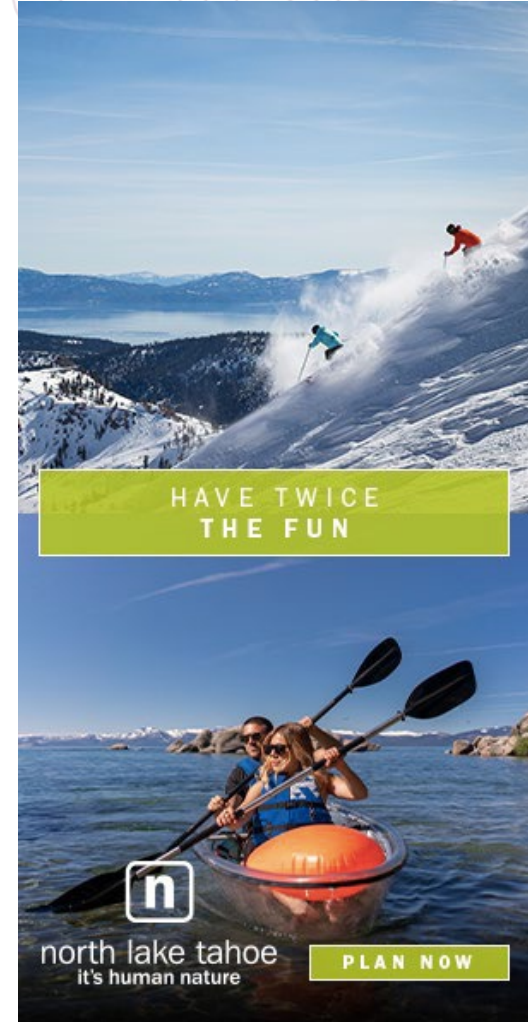


SPEEDBOAT BEACH  
Kings Beach, CA

**n**  
north lake tahoe  
it's human nature

PLAN NOW

This advertisement features a split image. The top half shows a skier on a mountain slope. The bottom half shows a man and a woman in blue life jackets paddling a kayak on a lake. A large, stylized teal topographic map of the region is overlaid on the left side of the image.



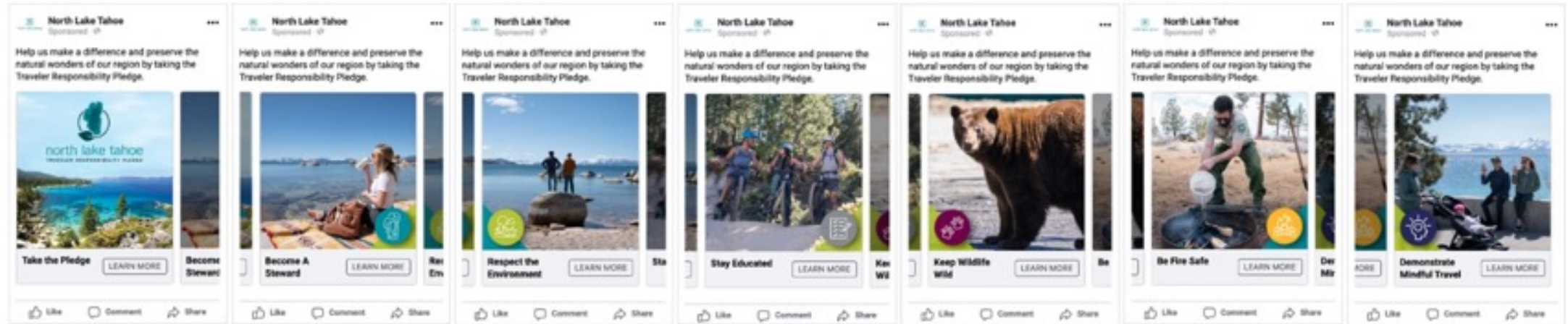
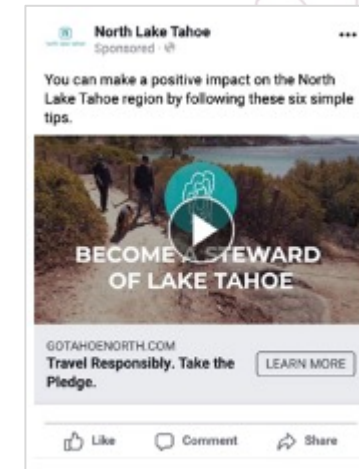
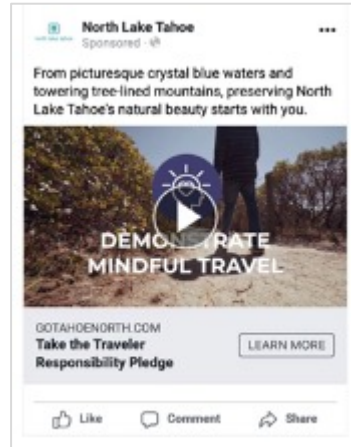
HAVE TWICE THE FUN

**n**  
north lake tahoe  
it's human nature

PLAN NOW

This advertisement features a split image. The top half shows two skiers descending a snowy mountain slope. The bottom half shows a man and a woman in blue life jackets paddling a kayak on a lake.

# 2022 CREATIVE – SUSTAINABILITY



# Thank You



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# Appendix



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# Out of State Markets Analysis: Spring '19

Total Trips

**564,814**

↓ -42.5% vs. 3/1/19 - 5/15/19



Visitor Days

**1,929,970**

↓ -34.6% vs. 3/1/19 - 5/15/19



Average Length of Stay

**3.4 Days**

↑ 13.3% vs. 3/1/19 - 5/15/19



Unique Visitors

**346,941**

↓ -50.0% vs. 3/1/19 - 5/15/19



## Top Markets

DMA	% of Trips 3/22 - 5/22	% Change of Trips vs 3/19 - 5/19	Total Visitation % Change vs 3/19 - 5/19
San Francisco-Oa...	37.1%	↓ 12.1%	↓ 56.5%
Sacramnto-Stkto...	29.8%	↑ 7.0%	↓ 24.6%
Los Angeles	6.9%	↑ 2.0%	↓ 18.4%
Monterey-Salinas	2.2%	↑ 0.1%	↓ 37.6%
San Diego	2.0%	↑ 0.4%	↓ 28.1%
Chico-Redding	1.7%	↑ 0.4%	↓ 24.4%
Fresno-Visalia	1.2%	↑ 0.2%	↓ 36.0%
Dallas-Ft. Worth	1.2%	↑ 0.2%	↓ 27.4%
Phoenix -Prescott	1.1%	↑ 0.3%	↓ 21.7%

## Top Markets

DMA	% of Trips 3/22 - 5/22	% Change of Trips vs 3/19 - 5/19	Total Visitation % Change vs 3/19 - 5/19
Las Vegas	1.0%	↑ 0.2%	↓ 26.5%
Salt Lake City	0.9%	↑ 0.2%	↓ 26.1%
New York	0.9%	↓ 0.8%	↓ 69.7%
Houston	0.9%	↑ 0.3%	↓ 14.4%
SantaBarbra-San...	0.8%	- 0.0%	↓ 37.5%
Reno	0.8%	↑ 0.4%	↑ 5.6%
Honolulu	0.8%	↑ 0.3%	↓ 7.8%
Denver	0.8%	↓ 0.5%	↓ 62.7%
Chicago	0.8%	↑ 0.2%	↓ 26.9%



# Top Points of Interest for Visitors: '19

Total Trips

564,814

↓ -42.5% vs. 3/1/19 - 5/15/19



Visitor Days

1,929,970

↓ -34.6% vs. 3/1/19 - 5/15/19



Average Length of Stay

3.4 Days

↑ 13.3% vs. 3/1/19 - 5/15/19



Unique Visitors

346,941

↓ -50.0% vs. 3/1/19 - 5/15/19



## Top POIs

POI	% of Trips 3/22 - 5/22	% Change vs 3/19 - 5/19
Incline Village	14.0%	↑ 4.6%
Tahoe City	10.8%	↓ 0.6%
Kings Beach	10.6%	↑ 3.0%
Squaw Valley Resort	9.9%	↓ 9.6%
Northstar California Reso...	9.5%	↑ 2.3%
Northstar	8.6%	↑ 2.7%
Heavenly Mountain Resort	7.5%	↑ 2.4%
Squaw Valley	7.3%	↓ 6.5%
Tahoe Vista	4.2%	↑ 1.4%
Crystal Bay	3.9%	↑ 0.9%

## Top POIs

POI	% of Trips 3/22 - 5/22	% Change vs 3/19 - 5/19
West Shore	3.5%	↓ 0.1%
Sugar Bowl Resort	2.8%	↑ 0.3%
Mt. Rose Ski Tahoe	1.5%	↑ 0.4%
Brockway	1.4%	↑ 0.6%
Alpine Meadows	1.3%	↓ 2.1%
Homewood Mountain Re...	1.2%	↑ 0.1%
Soda Springs Mountain R...	1.1%	↑ 0.1%
Diamond Peak Ski Resort	1.0%	↑ 0.1%



# Top Points of Interest for Visitors: 2022

## Top POIs

POI	% of Trips 3/22 - 5/22	% Change vs 3/21 - 5/21
Incline Village	14.0%	↓ 1.7%
Tahoe City	10.8%	↓ 1.2%
Kings Beach	10.6%	↓ 0.6%
Squaw Valley Resort	9.9%	↑ 2.6%
Northstar California Reso...	9.5%	↑ 2.2%
Northstar	8.6%	↑ 1.5%
Heavenly Mountain Resort	7.5%	↑ 0.7%
Squaw Valley	7.3%	↑ 1.5%
Tahoe Vista	4.2%	— 0.0%

## Top POIs

POI	% of Trips 3/22 - 5/22	% Change vs 3/21 - 5/21
Crystal Bay	3.9%	↓ 3.1%
West Shore	3.5%	↓ 0.8%
Sugar Bowl Resort	2.8%	↑ 0.1%
Mt. Rose Ski Tahoe	1.5%	↓ 0.2%
Brockway	1.4%	↓ 0.3%
Alpine Meadows	1.3%	↓ 0.2%
Homewood Mountain Re...	1.2%	↑ 0.1%
Soda Springs Mountain R...	1.1%	↓ 0.4%
Diamond Peak Ski Resort	1.0%	— 0.0%

