2023-24 FALL CAMPAIGN

north lake tahoe

AGENDA

- **Objectives/Strategies**
- **Target Markets**
- **Media Tactics**
- **Creative Direction**

CAMPAIGN STRATEGIES

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Tier 1:

- Increase length of stay
- Increase mid-week visitation

Tier 2:

- Support of and encourage participation in sustainability efforts
- Increase in-market spending and support of local businesses
- Engage with locals and visitors, promoting positive sentiment and community support
- Attract and motivate audiences by evoking emotion and creating a deeper connection through positioning, visuals and copy
- Increase awareness of seasonal activities, events and experiences
- Continue to grow destination awareness, brand loyalty and conversation

STRATEGIES

- Continue flexibility in plan
  - Prioritize media channels that can be easily adjusted vs traditional media

- Visitation data used to guide decisions (Datafy, Flight Research, etc)
  - Target markets
  - Media channels
  - Audience segments, persona's, etc.
  - High value visitors

- Maintain sustainability messaging

- Continue the fall Secret Season campaign messaging

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TARGET MARKETS

Research & Recommendations

PAST MARKETS BY YEAR & SEASON

2020-21

Fall
- Bay Area
- LA

Spring
- Houston
- Dallas

Winter
- SoCal (Winter only)

Summer
- Sacramento & LA
- Stockton/Modesto

2021-22

Fall
- LA
- San Diego
- Seattle
- Portland

Spring
- LA
- Dallas
- Houston
- Monterey-Salinas & Fresno

Winter
- LA

Summer
- LA

2022-23

Fall
- LA
- Seattle
- Portland
- Phoenix

Spring
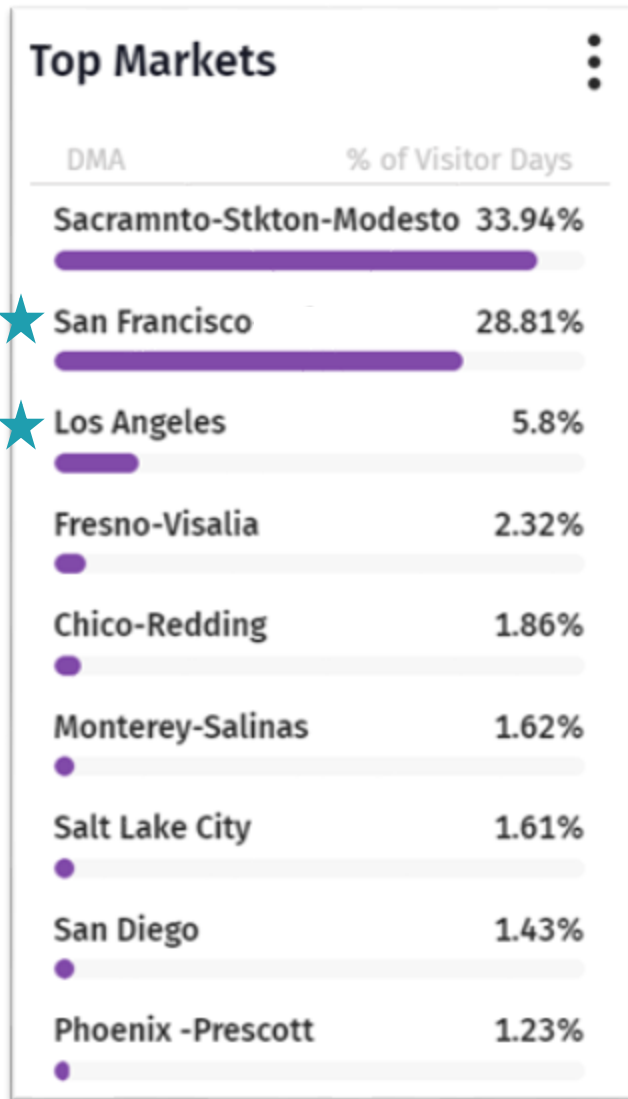- LA
- Dallas
- Phoenix
- Austin

Winter
- LA

Summer
- LA

DATAFY DASHBOARD: FALL - ALL MARKETS

2020

Top Markets

DMA	% of Visitor Days
Sacramnto-Stkton-Modesto	33.94%
★ San Francisco	28.81%
★ Los Angeles	5.8%
Fresno-Visalia	2.32%
Chico-Redding	1.86%
Monterey-Salinas	1.62%
Salt Lake City	1.61%
San Diego	1.43%
Phoenix -Prescott	1.23%

2021

Top Markets

DMA	% of Visitor Days
Sacramnto-Stkton-Mode...	33.31%
San Francisco	18.7%
★ Los Angeles	4.7%
Fresno-Visalia	2.51%
Salt Lake City	2.01%
Chico-Redding	1.99%
Phoenix -Prescott	1.65%
Denver	1.5%
Chicago	1.34%

2022

Top Markets

DMA	% of Visitor Days
Sacramnto-Stkton-Modes...	35.48%
San Francisco	14.32%
★ Los Angeles	4.52%
Fresno-Visalia	2.56%
Salt Lake City	2.22%
Chico-Redding	2.21%
★ Phoenix -Prescott	2.12%
Denver	1.7%
Chicago	1.63%

★ Markets targeted during specified year.

* Fall markets were pulled 9/1-11/15 each respective year.

DATAFY DASHBOARD: FALL – OUT OF STATE

2020

Top Markets

DMA	% of Visitor Days
Salt Lake City	7.25%
Phoenix -Prescott	6.01%
Chicago	4.6%
Denver	4.1%
Dallas-Ft. Worth	3.91%
Seattle-Tacoma	3.59%
Boise	3.43%
Portland- OR	3.08%
New York	2.48%

2021

Top Markets

DMA	% of Visitor Days
Salt Lake City	5.35%
Phoenix -Prescott	5.05%
Denver	4.59%
Chicago	4.09%
Boise	3.21%
New York	3.13%
Dallas-Ft. Worth	3.01%
★ Portland- OR	2.64%
★ Seattle-Tacoma	2.6%

2022

Top Markets

DMA	% of Visitor Days
★ Phoenix -Prescott	6.3%
Salt Lake City	5.76%
Denver	5.04%
Chicago	4.86%
New York	4.18%
★ Seattle-Tacoma	3.94%
Dallas-Ft. Worth	3.88%
Boise	3.02%
★ Portland- OR	2.65%

★ Markets targeted during specified year.

* Fall markets were pulled 9/1-11/15 each respective year.

AUDIENCE DEEP DIVE

AUDIENCE DEEP DIVES - SUMMARY

- Across the markets, Fall stays averaged longer, with 5-day trips dropping to 2–4-day trips in the Spring. Day trips percentages didn't vary much between seasons.

- Houston (Fall) pulled the highest ratio of $100k+ HHI at 61%. All other markets saw an average of 45%-49% of visitors with a $100k+ HHI level.

- Houston and Seattle pulled the most diverse visitors, Seattle pulling a heavier Asian demographic and Houston pulling a heavier Hispanic.

- Boise is not a valuable market to pursue at this time.
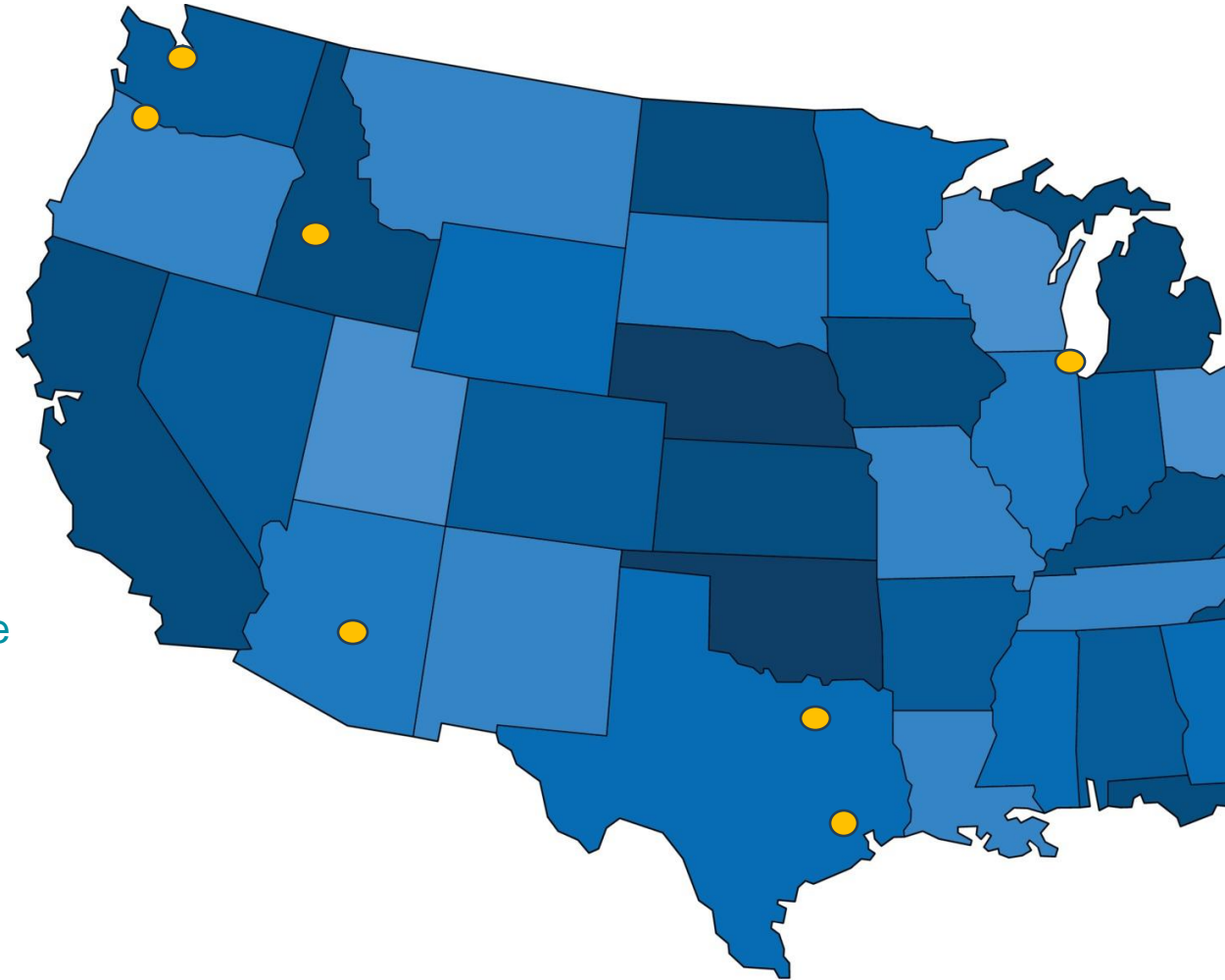
DIVERSITY BREAKDOWN BY MARKET – 2022-23 VISITORS
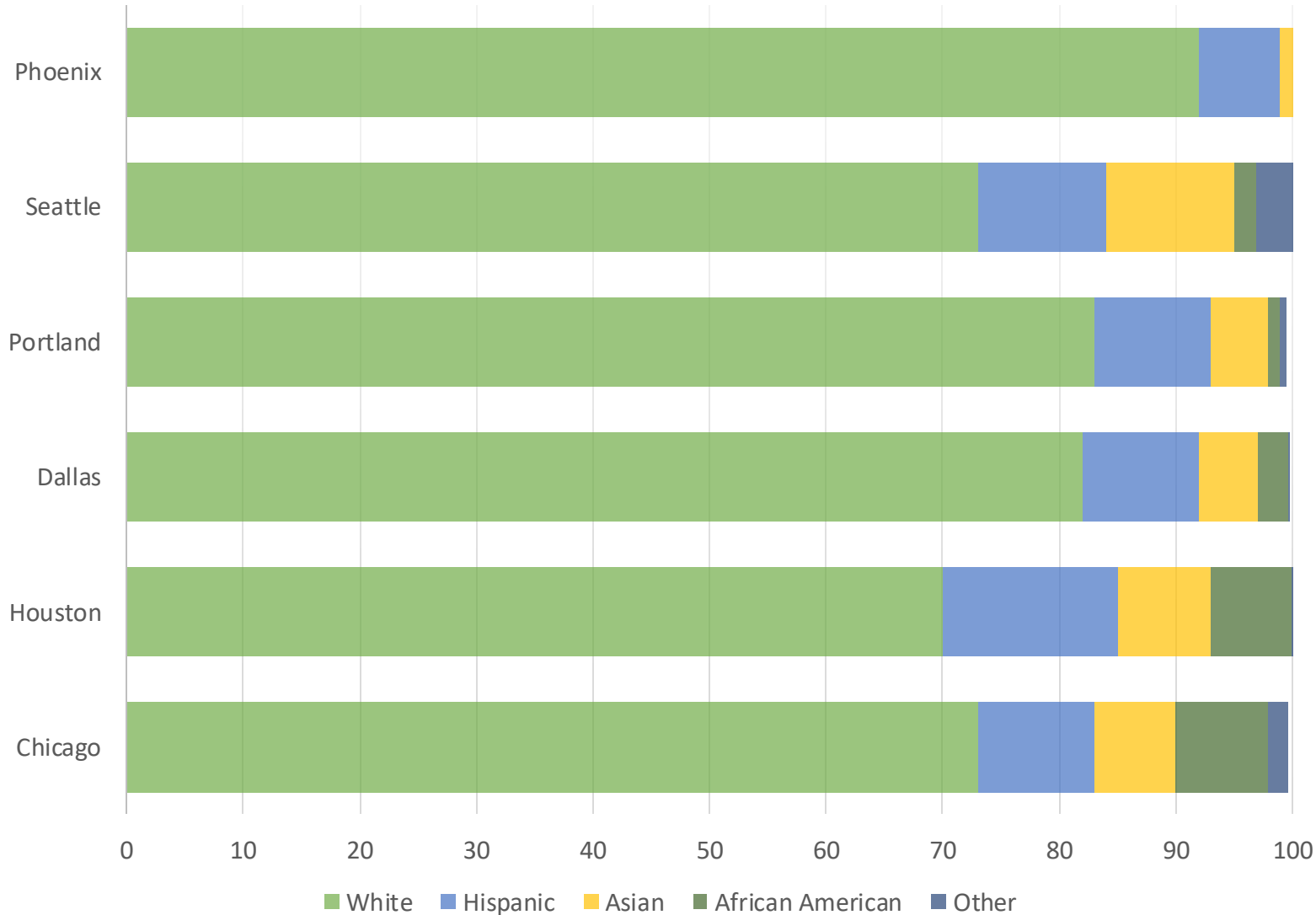
Top diverse visitation markets:

- Houston
- Seattle
- Chicago

Hispanic visitors were consistently the second largest demographic group, followed by Asian demographic groups.

Houston and Chicago markets held the highest African American visitor demographics.

PHOENIX MARKET – AUDIENCE DEEP DIVE

- From Phoenix, the three audiences seem fairly balanced for Fall, but Boomer and Family visitation spikes during Spring.

- 35% of Phoenix Fall visitors spent 6+ days in NLT.

- In Spring, 42% of visitors stayed for a day-trip. 32% stayed for 5+ days.

- Data trends show that audiences have been evening out across Fall visitation. Phoenix Fall visitors weighted more towards Boomer audiences from 2020-21.

Top Demographics - Fall

Age
- 45-64: 36.1%
- 25-44: 31.7%
- 65+: 28.8%
- 16-24: 3.4%

Household
- 1-2: 51.6%
- 3-5: 42.4%
- 6+: 6%

Top Demographics - Spring

Age
- 45-64: 38.9%
- 65+: 26%
- 25-44: 25.6%
- 16-24: 9.4%

Household
- 3-5: 50.5%
- 1-2: 47.8%
- 6+: 1.7%
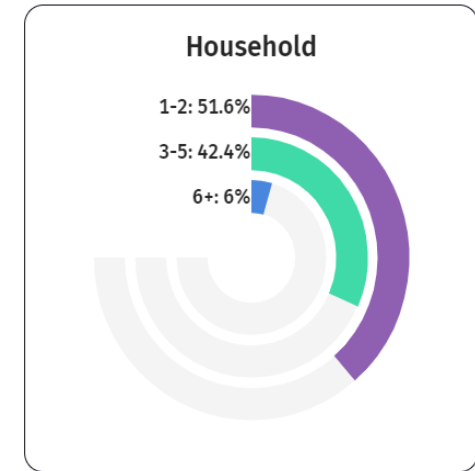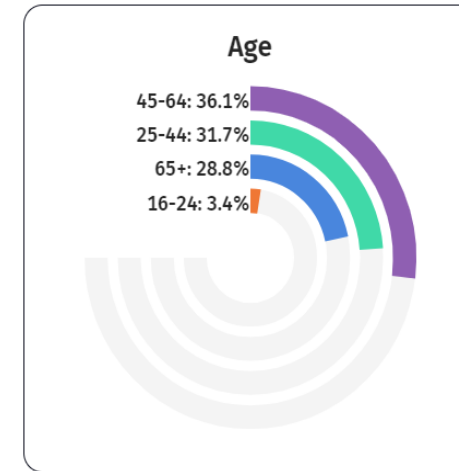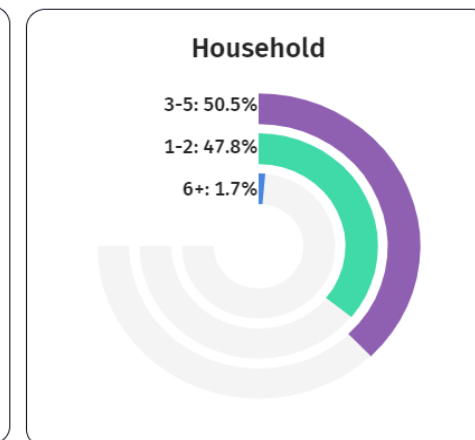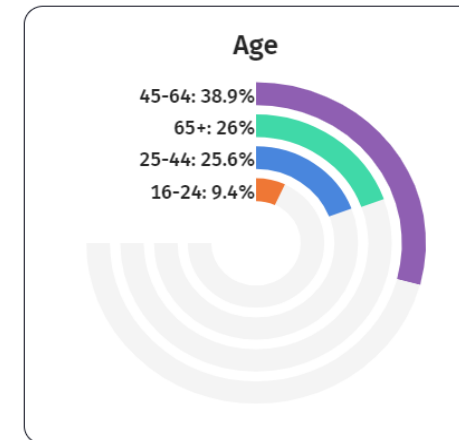
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SEATTLE MARKET – AUDIENCE DEEP DIVE

- In 2022-23, Seattle pulled a heavy Millennial and Family audience than Boomer. More than 50% of Fall visitors have a HHI of $100k+ and 79% have a HHI of $75k+. NLT sees higher wealth visitors visit in the Fall than in the Spring.

- Fall sees much higher 5-6+ day trips than Spring. Spring data shows fewer 5-day trips in favor of 2–4-day trips.

- Spring saw 40% increase in groups of 6+ travelers.

Top Demographics - Fall

Age
- 25-44: 33.8%
- 65+: 32%
- 45-64: 25%
- 16-24: 9.2%

Household
- 1-2: 45.8%
- 3-5: 42.9%
- 6+: 11.3%

Top Demographics - Spring

Age
- 25-44: 39.5%
- 45-64: 31.4%
- 65+: 20.4%
- 16-24: 8.7%

Household
- 1-2: 38.6%
- 3-5: 32.3%
- 6+: 29.1%

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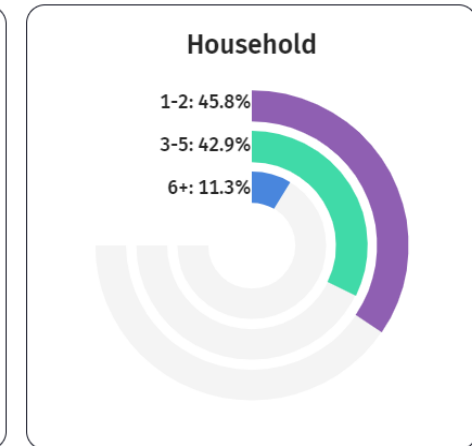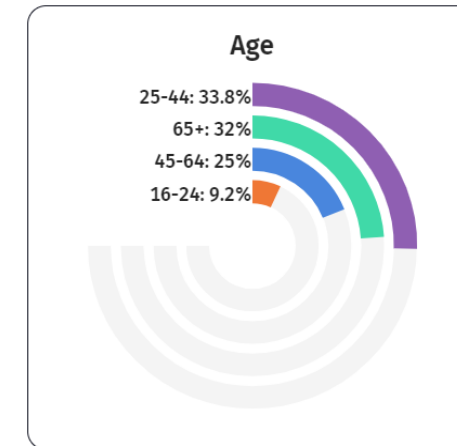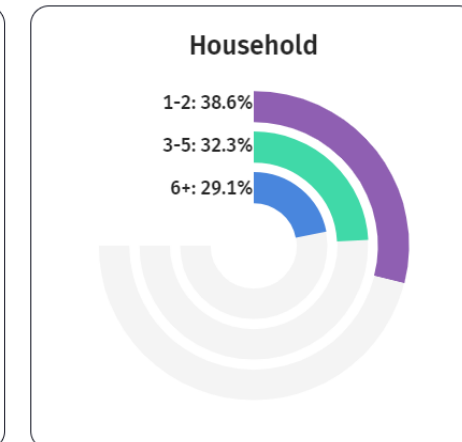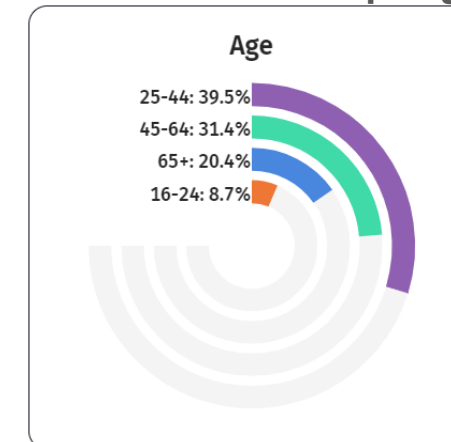
PORTLAND MARKET – AUDIENCE DEEP DIVE

- Fall's primary audience is 65+ couples. However, the Spring season pulls very heavy Millennial and Family audiences.

- Fall sees the longest stays for the Portland market, with Spring dropping 5-6+ day trips in favor of 2-4-day trips (similar to Seattle, visit length fluctuation between seasons.)

- Both seasons say 45% of visitors staying for day trips only.

- Overall, tallying length of stay by percentage, Seattle is pulling audiences who stay longer at NLT than Portland.

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Top Demographics - Fall

Age

- 65+: 35%
- 45-64: 33.8%
- 25-44: 21.8%
- 16-24: 9.4%

Household

- 1-2: 50.4%
- 3-5: 43.3%
- 6+: 6.4%

Top Demographics - Spring

Age

- 25-44: 37.3%
- 45-64: 30.1%
- 65+: 21.5%
- 16-24: 11%

Household

- 1-2: 62.9%
- 3-5: 25.9%
- 6+: 11.1%
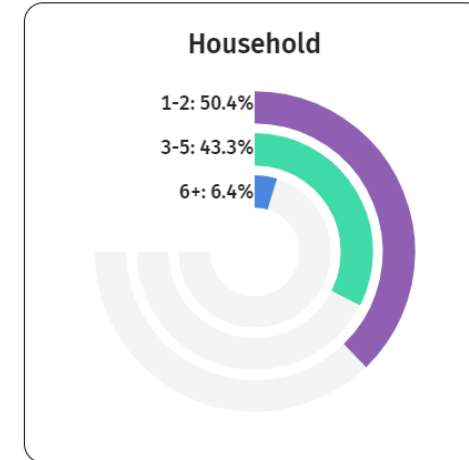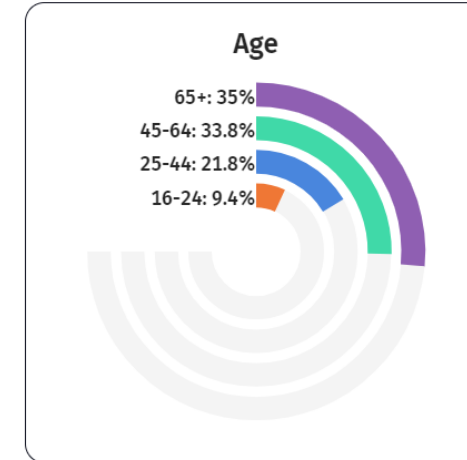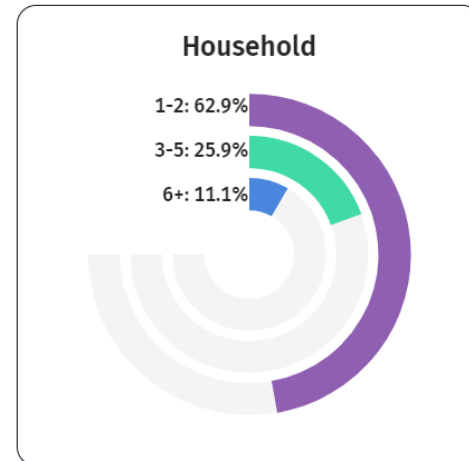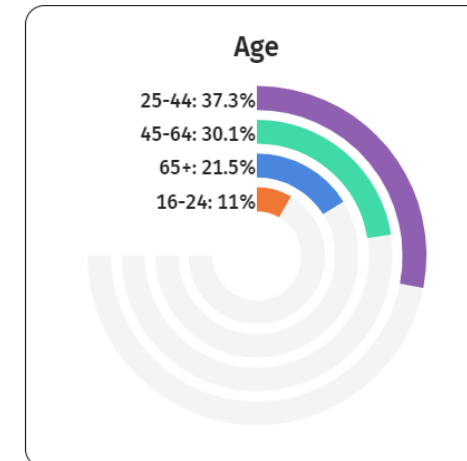
CHICAGO MARKET – AUDIENCE DEEP DIVE

- All three audiences balance for Fall, with Boomer leading slightly for Fall and by a large margin in Spring. If advertising in the Chicago market, Boomer and Families will be priority audiences.

- The largest HHI group is $100k+ followed immediately by the $0-$50k income group. Chicago is either pulling audiences with plenty of funds to spend or visitors with low vacation budgets, likely looking for wallet-friendly options.

- Trip lengths are longer in the Fall, shorter in the Spring.

Top Demographics - Fall

Age
- 65+: 32.8%
- 45-64: 28.3%
- 25-44: 28.1%
- 16-24: 10.7%

Household
- 1-2: 47.2%
- 3-5: 47.1%
- 6+: 5.7%

Top Demographics - Spring

Age
- 65+: 36.3%
- 45-64: 28.4%
- 25-44: 26.5%
- 16-24: 8.7%

Household
- 1-2: 58.8%
- 3-5: 39.6%
- 6+: 1.6%

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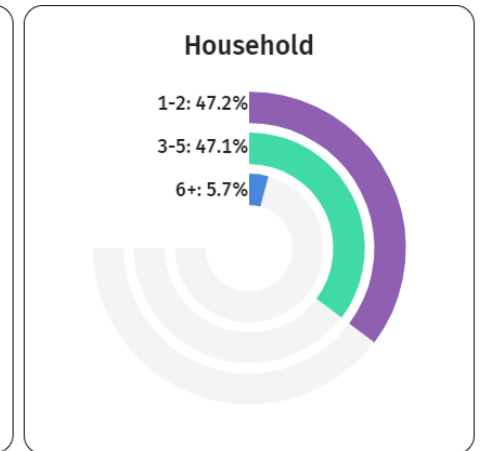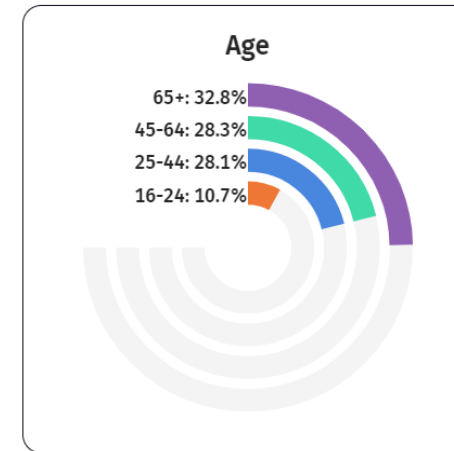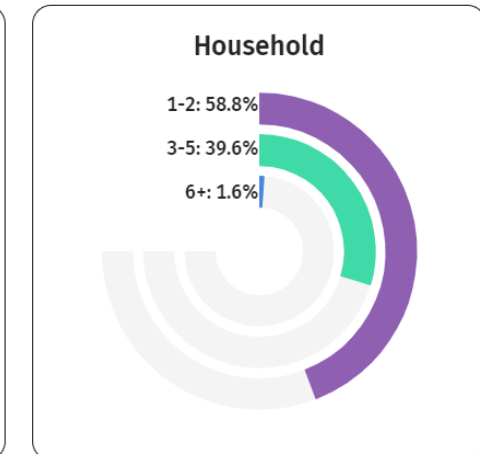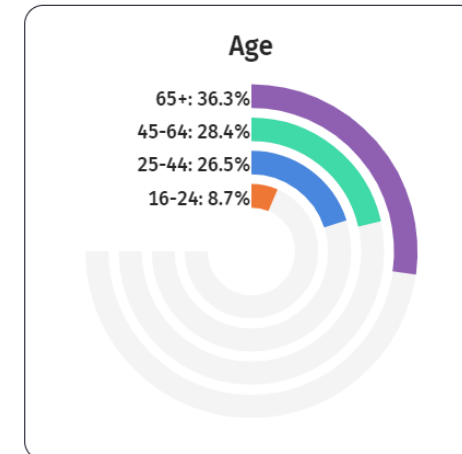
BOISE MARKET – AUDIENCE DEEP DIVE

- Boomer and Family visitation spikes during Fall, evening out more during Spring with Millennial and Family leading visitation. Group size is 50/50 for families and solo/couples however solo/couple visitors spike during Spring.

- Boise's Spring audience is primarily in the $0-$50k HHI income group. Recommend focusing on higher income markets during Spring.

  - Boise ranked shorter lengths of stay than other markets. Recommend passing on Boise until we see a shift in data.

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Top Demographics - Fall

Age
- 45-64: 45%
- 65+: 22.6%
- 25-44: 19.6%
- 16-24: 12.8%

Household
- 3-5: 48.2%
- 1-2: 47.4%
- 6+: 4.4%

Top Demographics - Spring

Age
- 25-44: 36.5%
- 45-64: 30.6%
- 65+: 24.7%
- 16-24: 8.1%

Household
- 1-2: 56.5%
- 3-5: 29.7%
- 6+: 13.8%
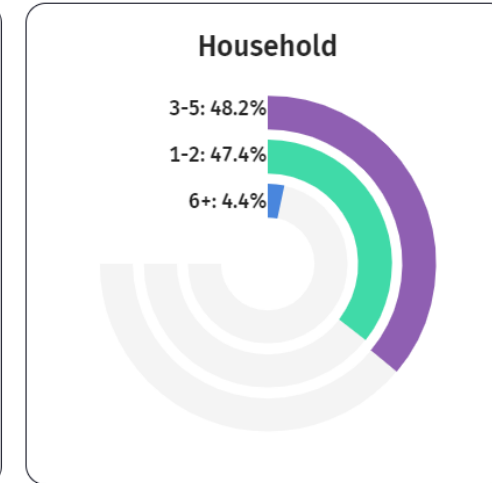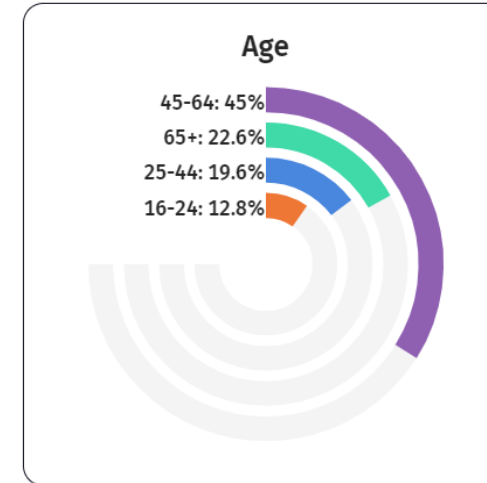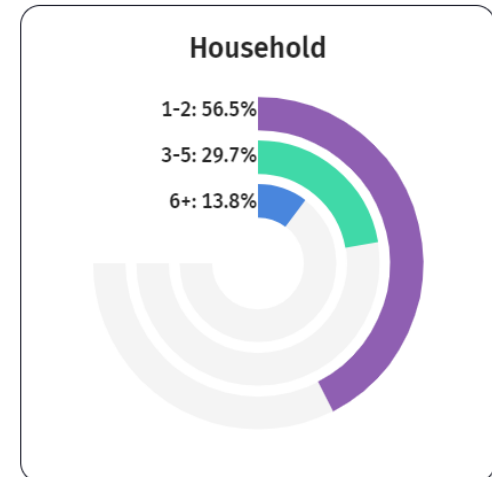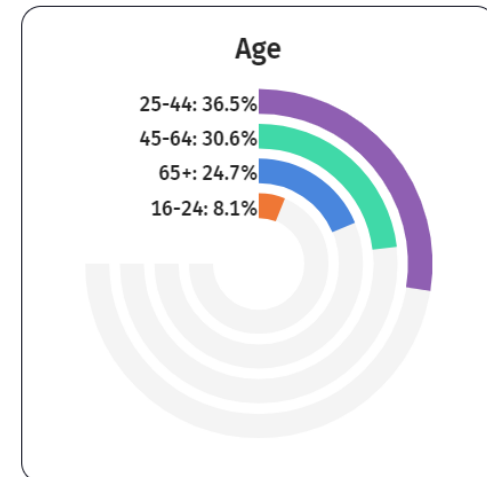
DALLAS MARKET – AUDIENCE DEEP DIVE

- Dallas pulls high HHI groups in the Fall with and decent representation off all three audience groups.

- Family or group trips spike during Spring. Fall primarily sees group sizes of 1-2.

- Again, Spring sees a shift from daytrips into 2-4-day trips.

- Overall, this market looks to be a strong investment to reach all three audiences, both small and large groups, and visitors with high HHI and likely high vacation budgets.

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Top Demographics - Fall

Age
- 45-64: 41.5%
- 25-44: 25.4%
- 65+: 23.3%
- 16-24: 9.9%

Household
- 1-2: 61%
- 3-5: 28.3%
- 6+: 10.7%

Top Demographics - Spring

Age
- 45-64: 36.6%
- 25-44: 31.3%
- 65+: 18.7%
- 16-24: 13.4%

Household
- 3-5: 50.5%
- 1-2: 43.2%
- 6+: 6.3%
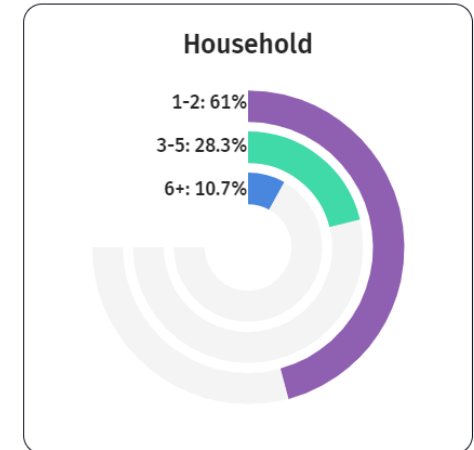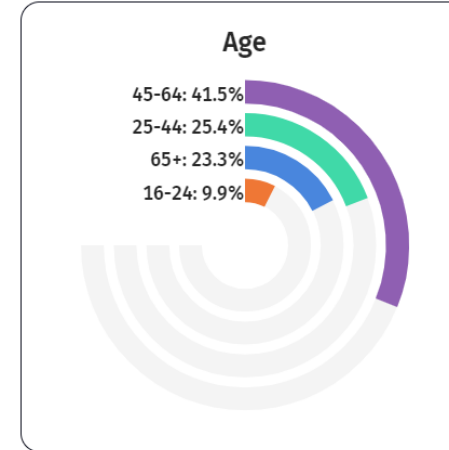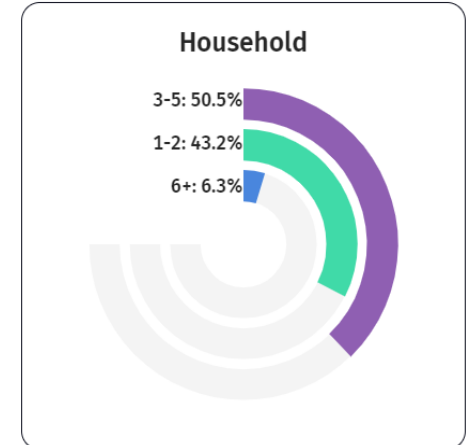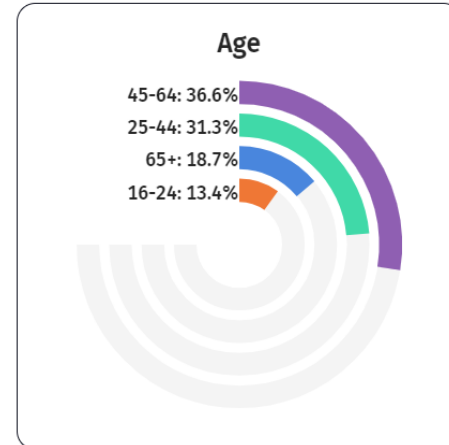
PAID MEDIA TACTICS

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CONSUMER MEDIA FLOWCHART

- Display

- Native

- Rich Media

- Paid Search – National

- Google Max

- Paid Social

- OTT/CTV

- YouTube Shorts/IG Reels

- YouTube Search

MEDIA FLOWCHART		2Q 2
	September	October	Nov
	28 4 11 18	25 2 9 16 23	30 6
	Fall		
	40%		
DIGITAL		
Programmatic: Display PT		
Programmatic: Display RT		
Native (programmatic)		
Native (direct)		
Rich Media		
Paid Search - National		
Google Max (Search, YouTube, Gmail Ads)		
Digital Total		
SOCIAL		
FB/IG PT		
FB/IG RT		
IG Stories		
Twitter		
Social Total		
VIDEO		
OTT.CTV		
Facebook Video		
TikTok		
YouTube Shorts/Instagram Reel		
Youtube Search RT		
Video Total		

CONSUMER MEDIA FLOWCHART

- Podcasting

- TripAdvisor

- Expedia

- Paid Emails

- Weekend Sherpa

- High Value Display and Social

- Sunset

- Sustainability focused in-market social

MEDIA FLOWCHART		September				October					Nov
		28	4	11	18	25	2	9	16	23	30	6
AUDIO											
VCA Podcast											
Podcasting											
Audio Total											
OTA's											
TripAdvisor (Desktop/Mobile/Audience/etc)											
Expedia/Travelzoo/Sojern											
OTA's Total											
Misc											
Email											
Weekend Sherpa (LA)											
LA Outdoor											
Programmatic Display (High Value / National)											
FB/IG (High Value / National)											
Sunset Custom Site Takeover – 1 Week											
Sunset Custom eBlast											
Misc Total											
Sustainability/Pledge/TART/etc.											
TV: Sacramento											
FB/IG (In-Market Travelers 75%; Locals 25%)											
Local Radio											
Print (CVG, NT, Travel Taste & Tour)											
Sustainability/Pledge/TART/etc. Total											
Adserving											

CREATIVE DIRECTION

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FALL CAMPAIGN CREATIVE – DISPLAY ADS

FALL CAMPAIGN CREATIVE – RICH MEDIA ADS

FALL CAMPAIGN CREATIVE – SOCIAL MEDIA ADS

North Lake Tahoe
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Savor, stroll and soar this fall in North Lake Tahoe. From breathtaking mountains to crystal blue waters your adventure awaits.

GOTAHOENORTH.COM
Plan an Unforgettable Secret Season Getaway   Learn more

👍 Like   💬 Comment   ➤ Share

North Lake Tahoe
Sponsored · ⊙

Elevate your senses, take in breathtaking views and put some adventure in your life this fall in North Lake Tahoe.

GOTAHOENORTH.COM
Make the Most of Your Trip - Stay Midweek   Learn more
Explore Fall Lodging Specials

👍 Like   💬 Comment   ➤ Share

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Tee up a good time or live it up with luxury experiences. No matter how you get away the Secret Season has you covered.
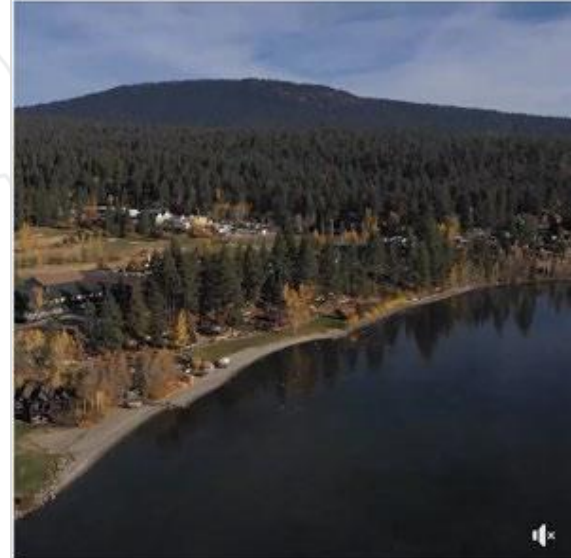
GOTAHOENORTH.COM
Stay for it all. Extend your trip midweek.   Learn more
Discover Fall Lodging Specials

👍 Like   💬 Comment   ➤ Share

North Lake Tahoe
Sponsored · ⊙
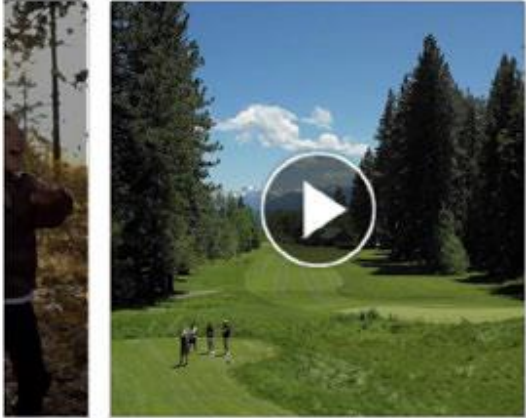
The secret is out...exploring North Lake Tahoe this fall is a must. Discover it all by extending your trip midweek or save with lodging specials.

GOTAHOENORTH.COM
Stay During Secret Season   Book now
It's Human Nature
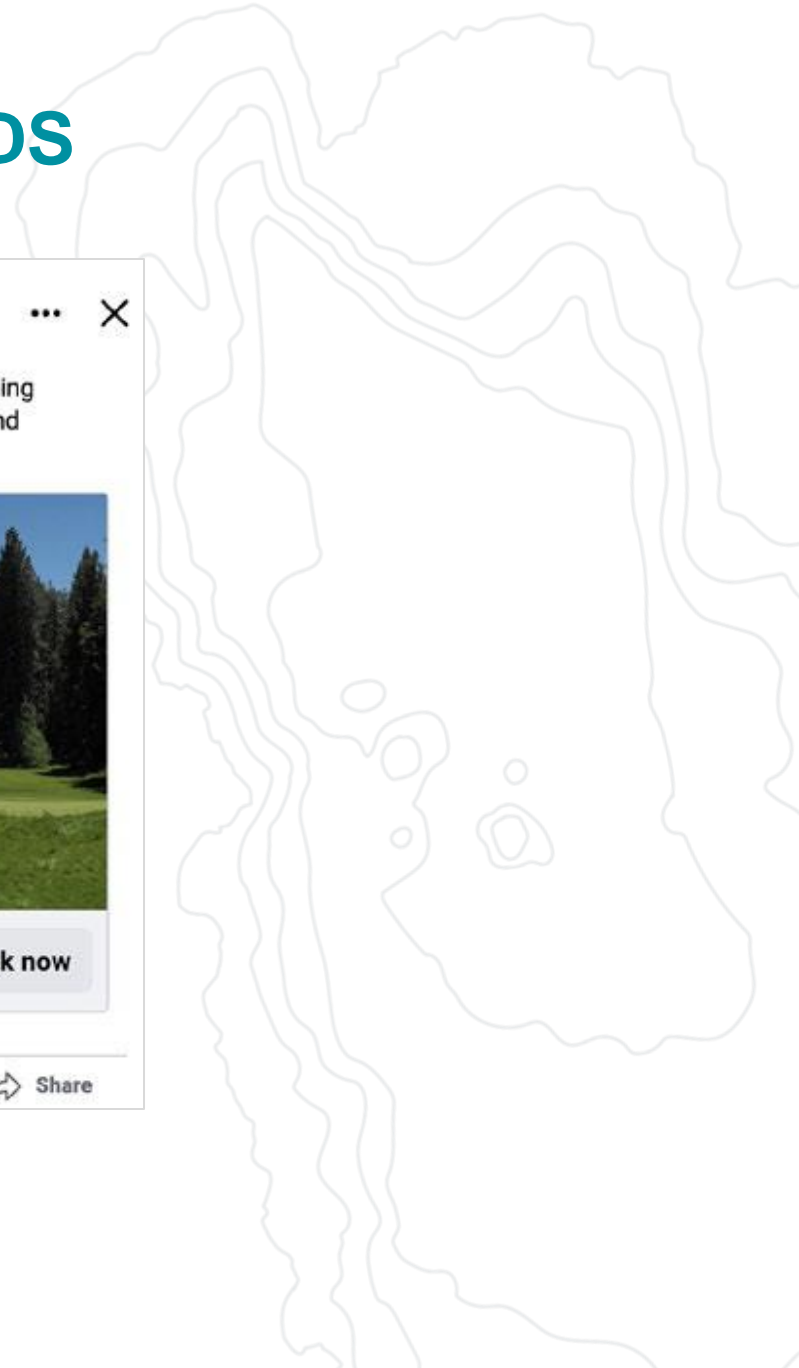
👍 Like   💬 Comment   ➤ Share

FALL CAMPAIGN CREATIVE – SOCIAL MEDIA ADS

FALL CAMPAIGN CREATIVE – SOCIAL MEDIA ADS
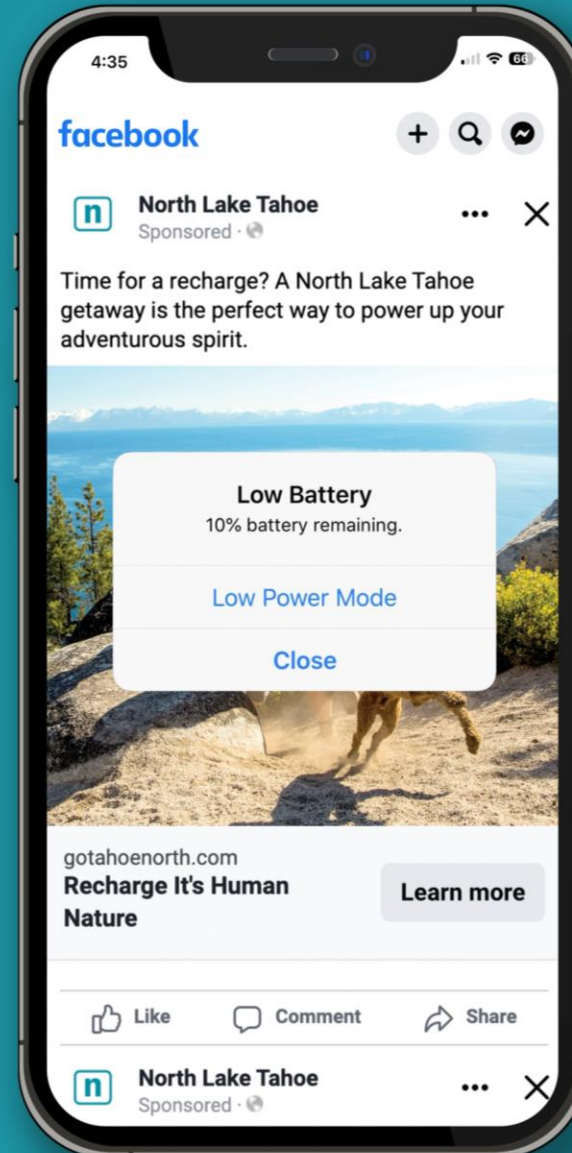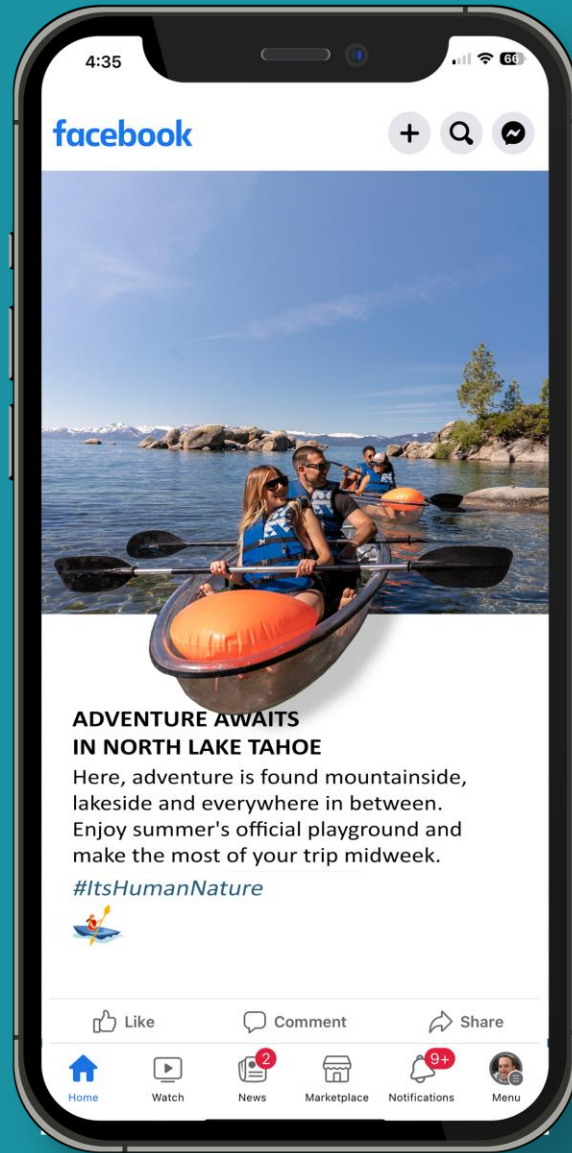
SUSTAINABILITY – FIRE SAFETY

SUSTAINABILITY – TART CONNECT

Carousel Ad

Single Image Ads

SUSTAINABILITY – TRAVELER RESPONSIBILITY PLEDGE

Thank You!