



**YOSEMITE**  
— MARIPOSA —  
COUNTY

**TOURISM BUREAU**

**Annual Report**  
**Fiscal Year**  
**2021/2022**



# Dear Lodging And Business Partners,

This fiscal year continued to be impacted by the pandemic. COVID-19 remained a focal point for all and a significant impediment to travel and tourism, considerably affecting the economy.

We saw significant impacts from the absence of domestic and international travel, and a reduction in travel in-state due to “California Travel Fatigue”, a phenomenon where Californians tired of only traveling in-state during the pandemic. People love Yosemite but many didn’t wish to travel to the region repeatedly. Without California in-state visitors, and no domestic or international visitors to replace them, overall visitation and lodging occupancy was down as much as 50% outside the Yosemite National Park gates. Yet, average daily rates were higher than normal, so some property revenues were actually up.

These factors resulted in the region experiencing a better-than-expected year overall, and a significant increase over prior year when properties had been closed during the worst of the COVID-19 outbreak.

But Yosemite Mariposa County’s dependence on tourism continued to be tested, as limited visitation due to Yosemite National Park’s temporary vehicle reservations system significantly restricted access to the park during what would have already been a slower than normal visitation year. For the second year, Yosemite National Park implemented a restrictive vehicle reservation system May through October 2021 due to COVID-19. In May 2022, YNP implemented a third year of restrictive vehicle access, impacting May and June of 2022 of the fiscal year. This reservation system was based on construction projects NPS believed would have significant impacts on traffic flows and parking. The 2022 reservation system ended September 30th, 2022.

The year was tumultuous, with ongoing challenges domestically and internationally, including

- Labor shortages, domestic and worldwide
- Inflation, domestic and worldwide
- Supply Chain issues worldwide
- Increases in fuel prices by as much as 200%, impacting travel, trade, supply, and inflation
- Uncertainty caused by the war in Ukraine beginning in February 2022, with threats from Russia starting in 2021

**County Contract** – YMCTB funding was limited to \$50,000 or about 10% of historic levels, This new level of funding was insufficient to meet normal obligations

of the agreement and was augmented by YMCTB using carry over funds from pandemic-reduced 2020 reserves. The reduction in county funds shifted more marketing efforts towards the “benefit of the payer” or the TBID lodging businesses in Mariposa County. YMCTB continued to support restaurants, retail, and tourism-related businesses, providing tens of thousands of direct referrals. In May 2022, the Lodging Association / YMCTB Board voted to eliminate the sunset on the temporary 1.5% TBID increase, scheduled to automatically return to 1% on January 1st, 2023. The vote allowed the TBID to remain indefinitely at 1.5%. These funds off-set the lost county funds and ensure adequate marketing to drive business to the region.

**Yosemite.com Website Replacement Project** – In July 2021, YMCTB received Aramark’s payment of \$193,536 in delayed TBID, making it possible for staff to begin the website replacement project. Through a six-month RFP process, YMCTB awarded a new website development and implementation contract. This project will take 18+ months to go-live with a new, “mobile-first” site to launch in April 2023.

**Groups and Weddings Market** – Staff recreated and improved the meeting planning and wedding webpages on Yosemite.com, as well as detailed sales sheets to use to promote meetings at trade shows. This market was expected to recover in PY 2021/2022, and YMCTB efforts would have ensured success in capturing as much of these segments as possible. Over the course of the year, however, it remained unclear what the NPS will allow meetings to be held inside of Yosemite. Until the Park Service and Aramark allow conferences, meetings and large



weddings in Yosemite NP, YMCTB paid efforts would not be prudent. All plans were placed on hold. Once these restrictions are lifted, YMCTB will increase leads through RFP's and distribute these leads according to the consumers' interests. The meetings, weddings and special events segments contribute as much as 25% of lodging visitation for those larger hotel establishments with event space, so recovery of the meetings and special events industry is vital to long-term lodging occupancy and recovery.

**Gap Analysis** – By mid-year 2021/2022 occupancy and demand was low. A business demand overview or “GAP Analysis” (forecasting occupancy and marketing adjustments based on data) process was implemented to gather property forecasted occupancy and communicate the results back to our constituents. This data helped property owners and managers better understand their property performance by gaining insight on regional demand and plan accordingly. Some of the key impacts:

- The Park reservations system July through October caused occupancy reductions, cancellations, and business volume softness at properties outside of Yosemite, or some distance from the park. This was key factor in decreasing regional occupancy.
- Labor shortages impacted the ability to run at full occupancy. This included restaurants and shops.
- Rates (ADR) were higher at some lodging properties as a result of increased labor costs due to labor shortages and need to off-set increased supply and fire insurance costs.

**Marketing Plan Shifts** – YMCTB's marketing and advertising work this past fiscal year shifted for two reasons. a) The decrease in funding from Mariposa County limited YMCTB's ability to promote non-lodging businesses. By adding in prior year reserves YMCTB continued to highlight retail, restaurant, and activity-based businesses, but not develop significant new content. B) The National Park Service “Peak Hours Reservations System” reduced peak seasonal visitation significantly. Although NPS has not shared overall visitation numbers for this past summer 2022 reservation system, it is clear that park vehicle and visitor visitation fell below NPS projections. With significantly reduced international and domestic visitation and the fact that Californians don't travel to Yosemite in the summer, YMCTB marketing to in-state travel for peak summer visitation would be a loss leader.

Digital media remains the significant majority of media our spend. Digital Display, SEM, Social Paid, Native, and Website. More funds were invested in 2021/2022 to international digital media than in prior years, focused on the UK, Germany, and Australia as these are our regions primary sources on in-bound International visitation. *Please see YMCTB's five detailed marketing reports located on Yosemite.com for a detailed account of marketing activity during the past year. There are too many segments to highlight in this brief overview.*

**International Efforts** – YMCTB stayed active in the international markets by retaining representation in our key international feeder markets. We anticipated that we should remain in front of international travel decisions through B2B and B2C earned media, social media and paid marketing. We kept international in-bound travelers dreaming about Yosemite Mariposa County. We also pushed to off-set negative media and consumer sentiment taking hold internationally regarding soft COVID safety, due to the low vaccination rates and resurgence of COVID in key US tourism destinations. The return to unrestricted travel to the US in November quickly resulted in limited, but steady, international visitation to our region. US Travel Association and Visit California rank US summer visitation at between 58% to 69% of pre-pandemic travel. Overall visitor spending and tax revenues from international travel are still down 31% in California vs. 2019 levels. The end of COVID-19 testing requirements in November 2021 was terrific, but too late to impact summer travel plans from our key markets, given that as much as 50% of long-haul travel was already booked for summer 2022.

**Partner Opportunities** – Compared to the prior year, our lodging partners participated at a significantly higher level in our cooperative (co-op) marketing programs overall. This demonstrated the desire for businesses to improve business volume. A Co-Op marketing survey was conducted that was extremely helpful in providing a needs assessment and determining interests, as well as a mechanism for YMCTB staff to engage quickly support respondents.

  
Jonathan Farrington  
CEO / Executive Director

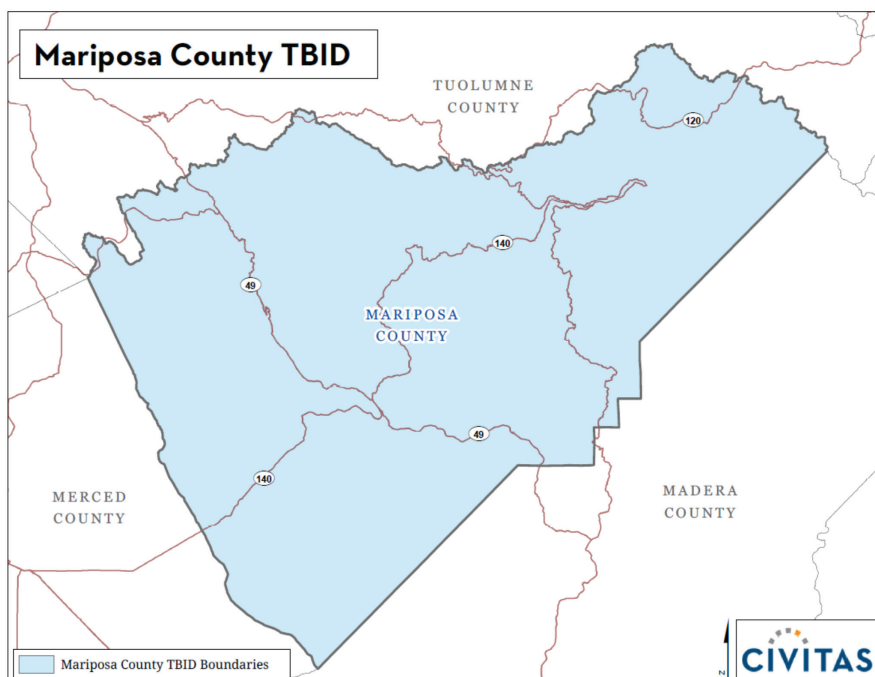
# TBID Assessment

## Mission Statement

The Yosemite Mariposa County Tourism Bureau is the branding, sales, and marketing agency responsible for positioning Yosemite Mariposa County as the destination of choice for leisure and group business for the economic benefit of the region.

## Key Strategic Initiatives

- Promote off season overnight visitation
- Educate customers and constituents
- Operate a fiscally sound and effective business
- Foster positive relationships with key stakeholders and partners



## TBID Statement

There are no proposed changes to the boundaries or assessed business. The TBID assessment rate for the 2022/2023 year is 1.5%.

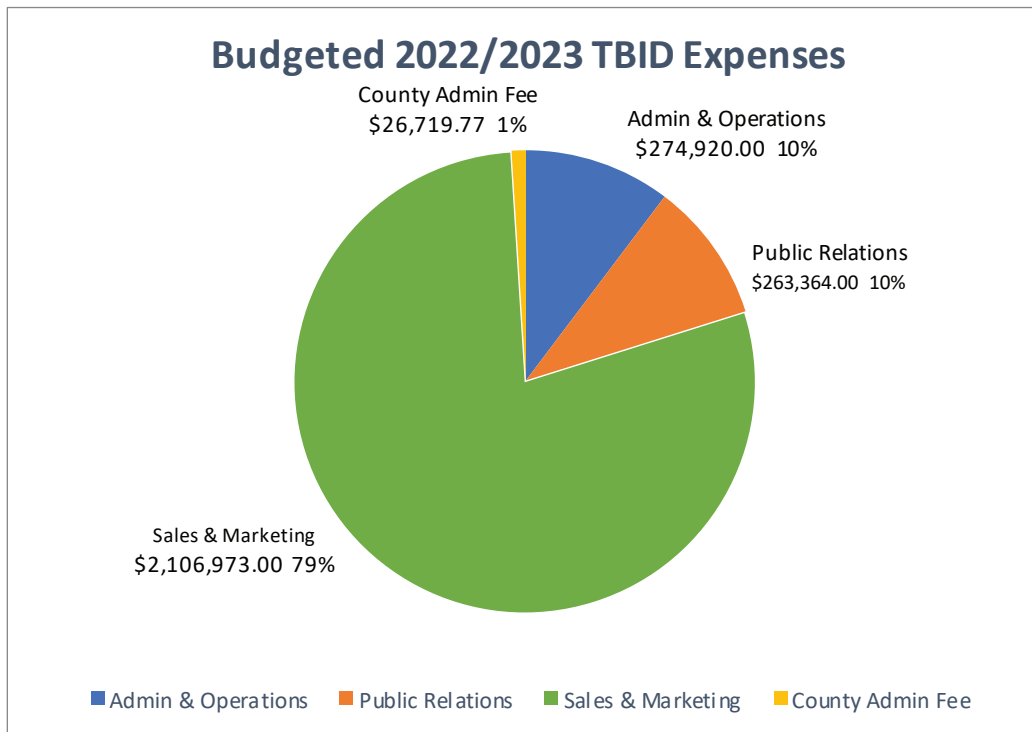
This TBID rate began in January 2021 with an possible sunset on December 31, 2022. During the prior funding cycle with Mariposa County, it became clear that the historic funding level from the County would remain a fraction of what it had been pre-pandemic. At its May 19, 2022 meeting, the Board of the lodging association / YMCTB determined that the sunset would be eliminated and the rate would continue at 1.5% until further notice, with the hope that county funding would continue at 40% to 50% of historic levels. Although the contract has not been renewed, the current budgeted amount from the county is \$50,000.

The district will continue to include lodging businesses, existing and in the future, available for public occupancy within the boundaries of the County of Mariposa, as shown.

# TBID Expenditures: Carryover from 2021/2022 and 2022/2023 Budget

At the end of the 2021/2022 fiscal year, the Bureau had a TBID carryover balance of \$0. The Bureau planned for a deficit that fiscal year and decreased its cash balance to make sure that the region was being marketed as fully as possible.

The 2022/2023 budget was developed with the same intent - to spend all TBID income for the year plus cash reserves in order to ensure that lodging partners received the maximum benefit from the Bureau's marketing efforts.



## 2022/2023 Annual Budget Notations

A significant focus this year is to build and implement a new website for Yosemite.com. As the primary asset for marketing Yosemite Mariposa County, the website is in need of a replacement. Noble Studios is contracted for the work in collaboration with the staff. The new website is expected to launch in early Spring 2023.

With the slow return of international travel and the travel trade industry, resources have been added to support this work. We are continuing work with our international offices, as well as funding the increased number of travel trade shows, familiarization (FAM) tours, as well as travel and other direct costs related to ensuring YMCTB's presence at such events domestically and internationally.

Due to the continued reduction in funding from Mariposa County compared to historical levels, sponsorships for festivals and local events will again be reduced to about one-third of traditional budgeted levels. Only those local events which impact overnight stays will be considered.

Maintaining flexibility is critical during these times as conditions can change significantly with little notice.

- Additional sources of income from grants will continue to be sought, though none of this income is budgeted given the uncertainty of this type of funding.
- The Board of Directors has given the CEO / Executive Director discretion to manage the budgeted expenses given the changing situation.

# Goals for 2022/2023

While Mariposa County continues to be impacted by the endemic stage of COVID, rising fuel prices and global inflation, YMCTB will continue to stretch its limited marketing funds to cover media costs that have significantly increased. The California tourism drive market is experiencing in-state travel fatigue, meaning Californians are going to more to domestic and international travel destinations now that travel restrictions have eased. As more than 60% of visitation to our region is California-based, we are in greater competition with the 100+ DMOs (Destination Marketing Organizations) whose goal is the same: bring California, domestic and international visitors to their destination.

With vaccines and new treatments, the impact of COVID-19 is not currently as significant a concern as it has been in the past. Lodging partners are still encouraged to emphasize their COVID-19 mitigation efforts, but overall travel sentiment about COVID-19 has been eclipsed by other economic considerations, namely inflation. It is also still unclear as to whether Yosemite National Park will implement a permanent or maintain a temporary vehicle peak hours reservations system going forward and what that might entail. The Washburn, Agua and Oak Fires in July 2022 have been tragic for our community and the recovery will take time. Additionally, recurring fires create safety and health concerns in international markets.

The YMCTB staff has developed a clear 3-year rolling marketing strategy and plan. For the 2022/2023 plan year, we have adjusted to emerging trends. The Board of Supervisors has been provided with a copy of the Marketing Plan, a proprietary document.



## **1. Complete the new Yosemite.com Website.**

As our primary marketing asset, this is a significant undertaking. Our staff and that of Noble Studios are working to make sure that the new website is “mobile-first” to reflect how the majority of visitors to the site interact with Yosemite.com. We will also focus much of our video production efforts toward producing appropriate content for the website, enhancing the ability of the site to maintain high levels of visitor interaction. Our goal is to have the new website completed in early Spring 2023.

**2. Focus on the California drive market.** Despite the current “California Travel Fatigue”, YMCTB will continue to market and promote October to May visitation to California residents as well as focus on semi-retired and retired travelers, who have started to travel again now that COVID-19 is shifting toward becoming “endemic”.

**3. Continue to market aggressively and reach out to the international market.** In November 2021, the United States eased its COVID-19 travel restrictions and international travel once again became possible to Yosemite Mariposa County. Because YMCTB had maintained its International marketing programs throughout the pandemic, unlike many other DMOs, we have seen a better long-term strategy and return visitation. We expect to see the recovery for international travel to continue, but we also are aware that economic factors are a growing barrier to travel.



2022/2023 visitation is expected to be 70–75% of pre-pandemic levels.

**4. Resume Sales, Travel Trade & FAM trips for international travel trade and PR/Media.** We have already seen a significant increase in the number of international FAMs. Domestic media-related sales trips and visits will also continue. Educational training on the destination is a priority.

**5. Increase earned media results.** Editorial has huge value in comparison to paid print or native media. The cost vs. results is a solid investment. California-based PR support will handle domestic earned media opportunities while international media will be supported by several international offices.

**6. Reassess social media strategy for continued success and investment.** There are always ongoing changes to social media algorithms and programs. The current social media landscape has been making radical shifts which is requiring significant strategy changes. Remaining flexible and keeping up-to-date on changes to the social media universe are critical. Maintaining market share is a challenge.

**7. Emphasize earned and owned email communications.** With the potential end to Google's cookies (now intended to sunset in 2024), the importance of first party data for marketing has

become more important. We will continue to seek new email subscribers as well as improve our content and delivery methods.

**8. Drive lower-funnel or short-term bookings through traditional media (radio and print).**

2021/2022 marked the most participation in co-ops by our lodging partners. We will continue these advertising opportunities in both print ad placements and digital native advertising. Radio advertising in the Bay Area will continue to message our largest group of California visitors.

**9. Continue to invest in digital media.** This is YMCTB's largest area of media investment. Noble Studio's daily monitoring of Yosemite.com performance has led to superior management or shifting of digital media spend to the highest performing channels based on real-time monitoring. Digital media includes social media advertising, display advertising, video ads and search engine marketing (SEM / paid search).

**10. Complete the new Destination Vacation Planners** – The 68-page, printed destination vacation planner (DVP) is overdue for a complete overhaul. As printed visitor guides are expensive to produce and distribute, the new DVP will be digital, available to read and download on Yosemite.com. A less-expensive “mini-DVP” for travel trade uses will also be revised but printed for B2B or B2C use.



# 2022/2023 Leadership

## **Board of Directors**

**Brett Archer**

*Tenaya Lodge at Yosemite*

**Scott Randall**

*AutoCamp Yosemite*

**Kim Brisack**

*Coulter Cafe & Big Table Ranch*

**Chelsie Layman**

*Yosemite Hospitality*

**Ron Halcrow**

*Yosemite Plaisance Bed & Breakfast*

**MaryAnn Huff**

*Community Member*

**Victoria Imrie**

*Yosemite Ziplines and Adventure Ranch*

**Christian Mueller, Board Vice Chair**

*The Redwoods at Yosemite*

**Donna Nassar, Board Secretary**

*Community Member*

**Candy O'Donel-Browne**

*Community Member*

**Gautam Patel**

*Foothills Hospitality Group*

**Douglas Shaw, Board Treasurer**

*Yosemite Bug Rustic Mountain Resort*

**Kevin Shelton, Board Chair**

*Yosemite Resorts*

## **Board Liaisons**

**Rosemarie Smallcombe**

*Mariposa County Board Supervisor, District I*

**Wayne Forsythe**

*Mariposa County Board Supervisor, District IV*

## **Advisory Council**

**Scott Gediman**

*Yosemite National Park*

**Board Chair**

*Mariposa Chamber of Commerce*

## **Marketing Committee**

**Kim Brisack**

*Coulter Cafe & Big Table Ranch*

**Nia Huerta**

*Tenaya Lodge at Yosemite*

**Chelsie Layman**

*Yosemite Hospitality*

**Scott Gediman**

*Yosemite National Park*

**Yuli Gotsev**

*The Redwoods in Yosemite*

**Victoria Imrie**

*Yosemite Ziplines and Adventure Ranch*

**Donna Nassar**

*Community Member*

**Douglas Shaw**

*Yosemite Bug Rustic Mountain Resort*

**Kevin Shelton**

*Yosemite Resorts*

**Emerald Wong**

*AutoCamp Yosemite*

## **Tourism Bureau Staff**

**Jonathan Farrington**

*CEO / Executive Director*

**Ellen Bergstone Wasil**

*Director of Marketing & Creative*

**Tony McDaniel**

*Director of Communications*

**Craig Polson**

*Social Media & Content Curator*

**Aaron Demery**

*Operations Manager*

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