



Yosemite Mariposa County Tourism Bureau Executive Director & Marketing Updates October 19, 2023

Director Update

July through September is a busy quarter for staff. Among other projects, once the budget is approved in June by the board, contracts are renewed or placed for our international partners, agencies for media and PR, including subcontractors. Major media buys and commitments are also approved and contracted, and marketing activities for fall are already underway.

Tourism general outlook. With no reservation system in place, lodging occupancy improved in the first part of the 2023 – 2024 fiscal year. According to Brand USA and Visit California, domestic travel is back to 98% of normal when compared to pre-pandemic numbers reported in 2019. Business Individual Travel and Group/Conference travel is at 77% and 66% compared to 2019. International travel is only 55% recovered for the greater US and California. The shortfall in visitation are in-bound countries not as critical to Yosemite Mariposa such as China, but still important to our economy. Overall, we have a long way to go in recovery, and travel hurdles and restrictions continue to slow this recovery.

Visitation via auto to YNP without a reservation system this year through August is still below prior-year (PY) Year-to-date (YTD). Current YTD is 2,338,778 and PY is 2,481,528 via auto. Bus traffic is up 15.1% or 17,341 visitors to 87,591.

TOT and TBID collection payments run 30-60 days later than the consumed date of visit. For the first two months of the fiscal year YMCTB TBID collections (peak season) were \$712,031 to a budget of \$725,000. Projections were very close. YMCTB received September's TBID at \$450,856, 50% higher than projected. As these collections represent 30 – 60 days prior, we feel the higher number is reflective of August and some delayed July payments from lodging properties to the county.

Immediate forecast of occupancy over the next three months. We'd like the board and constituents feedback on this. AirDNA is showing mixed advance bookings in the Short-Term Rental (STR) market. That said, different geo areas are doing more favorable than others. Overall, for the county, booking pace for STRs in October is up 2% as of August 12th, but down

8% in November and December. STRs inside Yosemite are at +4%, -5% and -5%. Mariposa less Yosemite is at +2%, -12% and -11%.

Yosemite National Park Update on upcoming operations during Yosemite Gateway Partners and YARTS JPA/AAC meetings in Yosemite NP.

- When asked about a possible reservation system this February for the Firefall/Horsetail Fall event, Superintendent Cicely Muldoon said there would be a reservation system. YMCTB asked that NPS consider not closing Badger Pass or Hetch Hetchy during this period to allow visitation for folks not interested in the Firefall event.
- When asked if there would be a reservation system put in place for the summer of 2023 – 2024, Superintendent Muldoon’s response was; “There will be a pilot program put in place in 2024. We’re just not sure what the details will be yet”.

Community Meetings: YMCTB will resume community or town hall meetings this January. 3 – 4 meetings will be planned throughout the county north to south. As part of this process, staff is creating a constituent survey, primarily focused on lodging partners, as TBID “must be used to the benefit of the payer”. The survey will focus on our core initiatives, constituents’ general knowledge of the services we provide, knowledge of free services we offer and the robust co-op programs. Overall, the goal is to seek suggestions for improvement and communicate the work we do on the lodging association behalf. Some questions will include asking opinions on YMCTBs advocacy or neutral positions on issues such as STRs and possible county action, the YNP reservation system or other changes to lodging policy, new lodging development, etc. We’d like to know if our constituents agree with our current positions on these topics or if they would like us to take a different direction. All the results will be published and shared during the meetings.

Executive Director public activities, events, conferences and local – Activities included attending CalTravel Summit, Monterey CA (the state’s tourism PAC focused and educational program), Visit California & JLL regional meetings, Rural Visit California board meetings, Mariposa County Business Association meetings, Brand USA interview, Raj Patel constituent meeting with Supervisor Poe, meeting with Lina Jimah from the US Department of Commerce, YGP Board Meetings & YGP Board Retreat in Mammoth and Lee Vining, CA, and YGP’s October Quarterly meeting, the YARTS Joint JPA and AAC Meeting in Yosemite, Coyote Fest, the memorial for Leroy Radanovich, the founder of YMCTB.

Marketing Update

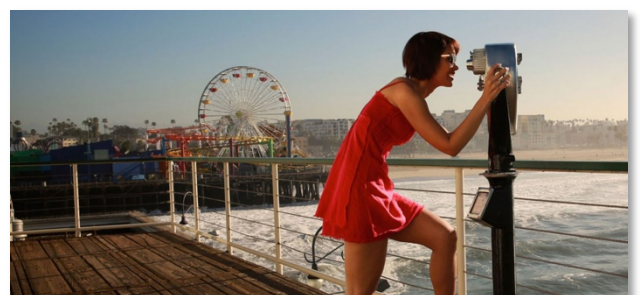
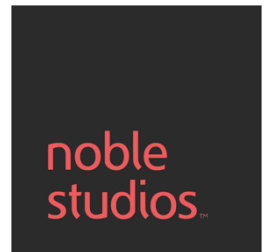
Creative Agency Selected

We issued our RFP on July 10 to seven agencies. We received six responses from agencies with headquarters in New York (2), Wisconsin, Arizona, Nevada and California. A subcommittee of the Marketing Committee reviewed all submissions and selected three to continue to the next

round. Only one of the agencies was within budget, but Jonathan and Ellen met with all three agencies to have level set discussions before the in-person presentations on September 25. Staff also prepared additional questions to be answered in writing in advance of the presentations. Each agency brought a team of four individuals to the presentations in the County Supervisors' Chambers. After the presentations the subcommittee gave their feedback and recommended two of the three for further consideration. Jonathan and Ellen reviewed the proposals again and ultimately decided to hire our current digital marketing performance agency, **Noble Studios**. Their work for groups like Lake Tahoe ("Awe and Then Some"), their familiarity with the destination and ability to ramp up quickly were compelling reasons; they also provided the most affordable revised budget.

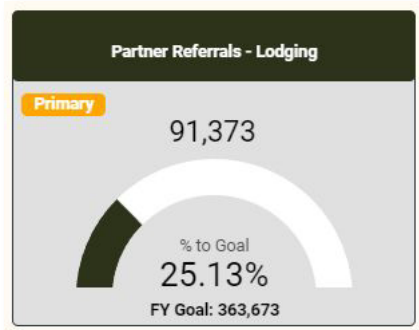


A **big thank you** to the members of the Marketing Subcommittee for all of their time and effort to help assess the proposals and interview the agencies!



KPIs: Digital Performance Recap

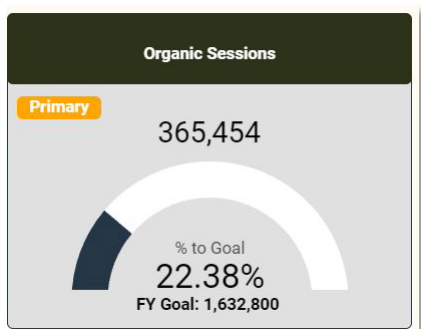
We are pleased to report that we are on pace for our **lodging partner referrals** for the first quarter of 2023. We are at 25.13% for July 1 – September 30, 2023. Lodging referrals are up MOM for Meta ads, paid search, direct referrals, Book>Direct referral traffic and Meta ads managed in-house by YMCTB staff.



Partner referrals increased the most MoM for Sacramento, San Diego and Portland. Sacramento and San Diego were impacted by paid media. Specifically, the spend for our paid Meta campaigns was increased. This led to more interaction MoM for LA (+235%), Sacramento (+4%) and San Diego (+298%).

DMA (Metro)	Sessions	% Δ	Lodging Referrals	% Δ	CVR	% Δ
San Francisco-Oakland-San Jose CA	63,710	-12.7% ↓	5,924	-6.7% ↓	9.3%	7.0% ↑
Los Angeles CA	45,517	16.0% ↑	3,171	-6.5% ↓	6.97%	-19.4% ↓
Sacramento-Stockton-Modesto CA	32,315	-9.2% ↓	2,190	10.1% ↑	6.78%	21.2% ↑
(not set)	38,555	-22.1% ↓	1,943	-19.9% ↓	5.04%	2.8% ↑
Seattle-Tacoma WA	9,989	-12.5% ↓	860	-2.9% ↓	8.61%	10.9% ↑
Fresno-Visalia CA	12,637	-26.1% ↓	796	1.1% ↑	6.3%	36.8% ↑
San Diego CA	10,531	54.4% ↑	646	20.7% ↑	6.13%	-21.8% ↓
Portland OR	5,233	-15.2% ↓	534	13.6% ↑	10.2%	34.0% ↑
Spokane WA	5,609	-13.8% ↓	434	-12.3% ↓	7.74%	1.7% ↑
New York, NY	3,375	-21.9% ↓	332	-17.4% ↓	9.84%	5.8% ↑
Reno NV	3,879	-14.0% ↓	295	-14.2% ↓	7.61%	-0.2% ↓

Our **organic sessions** are slightly behind goal, but getting closer. We've seen an increase of 13% YoY.

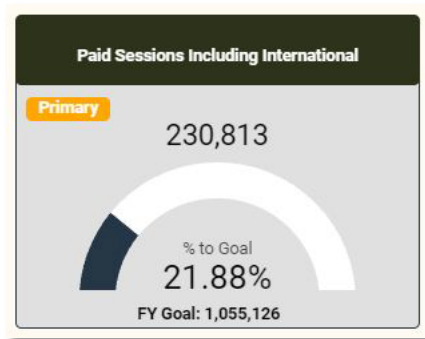


Notable pages that saw increases include:

- /the-ahwahnee-hotel page (+66%)
- /curry-village (+263%)
- /places-to-stay (+204%)

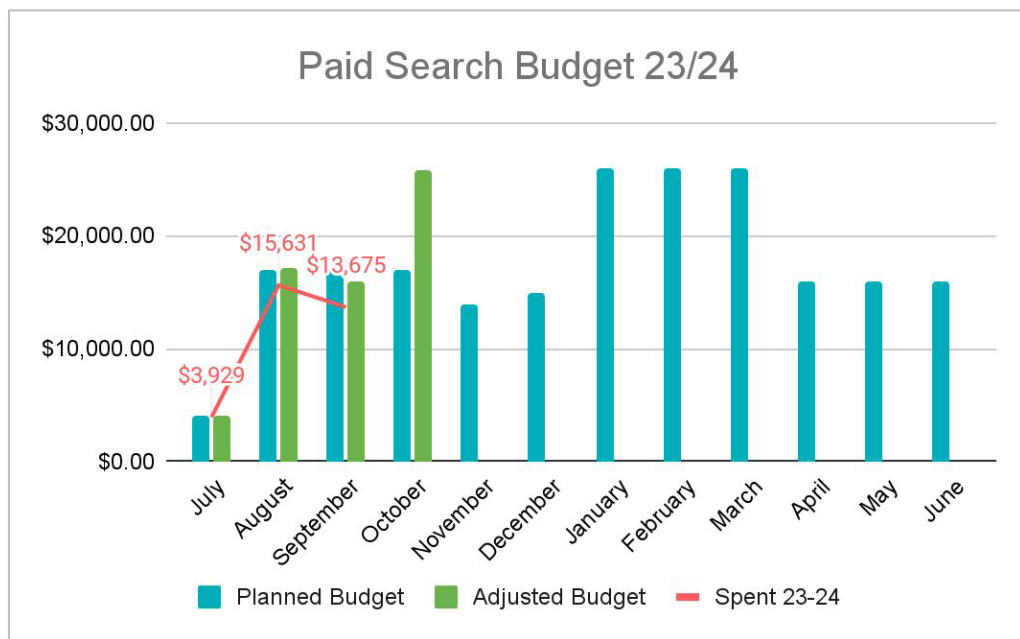
However, the homepage saw a 28% decrease YoY.

Our **paid sessions**, including international, are a bit behind our goals overall, but we decreased our spend significantly in July, and has been steadily increasing. We expect to be back to pacing at this goal in the next few months.



Paid Search:

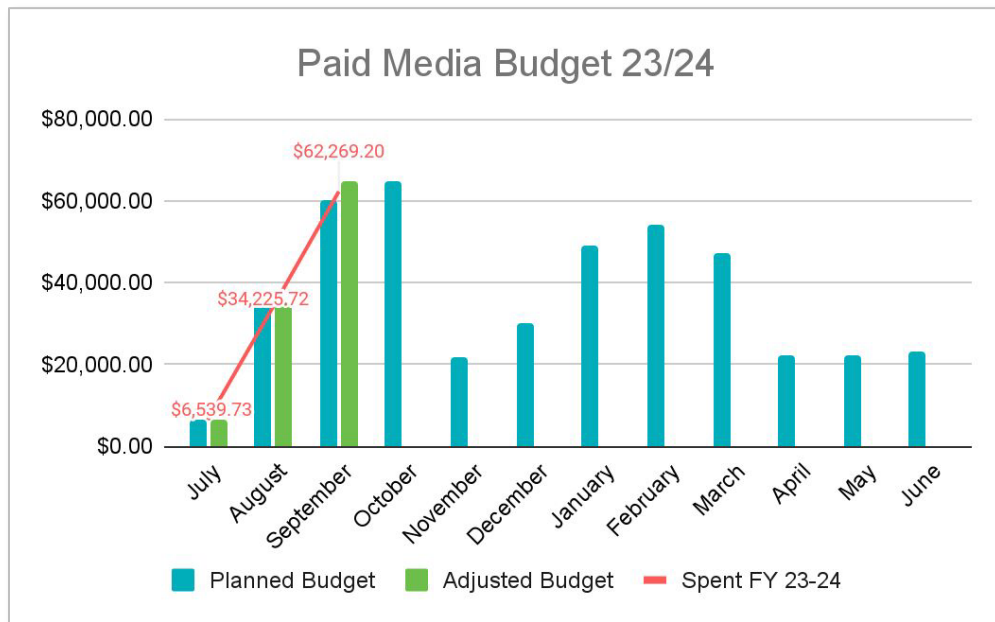
- **Budget** – Our spend is 21% less than it was YoY so our impressions are behind 21% and our clicks are down 16%. Performance improved, with the click through rate increasing 8% YoY, but conversion rate is down 25% YoY. Much more will be spent in October than the prior months.



- To improve the conversion rate, Noble Studios will optimize Google Ads to Book>Direct referrals, which are currently not being tracked in Google Ads as goals. This will help train Google's machine learning to optimize campaign spend toward earning those referrals. This will also help us more accurately allocate spend to highest performers, report more accurately and increase conversions.

Paid Media:

- Budget – Our budget was significantly lower in July and August. By September, however, our spending had nearly doubled August as we focused more efforts on travel during the fall season.

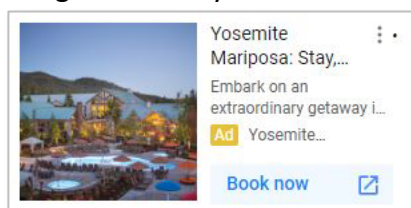


- Domestic: Display and Google Discovery Network – Last winter Noble Studios implemented Google Discovery Ads, these ads have multiple headlines, descriptions, and imagery that can be tested for the best response. They are considered “display” ads, but are much more effective with an average CTR of 1.03% vs the 0.16% with regular display alone.

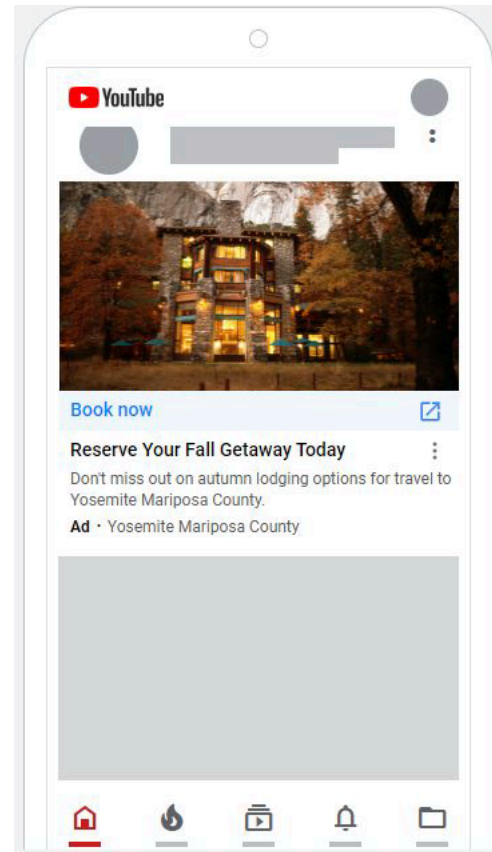
Regular Display:



Google Discovery Network:



Google Discovery Network:

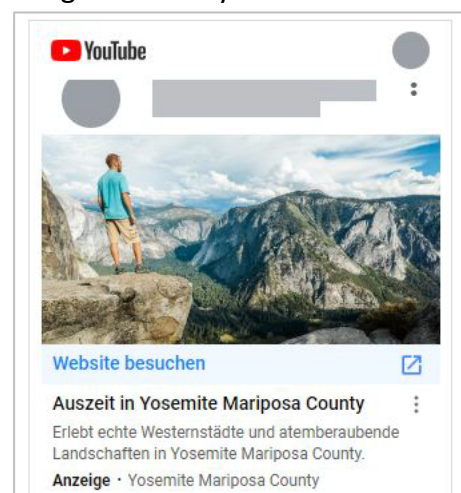


- International (UK, Germany and Australia): We have been running regular display ads for and have added Google Discovery Network ads as well. YoY, international campaigns have earned a 334% increase in CTR (0.94% vs. 0.21%), also improving in CVR (0.23% vs. 0%). 65% of these conversions were lodging partner referrals, a very unusual occurrence as most lodging is booked via a travel agent in these countries.

Regular Display:



Google Discovery Network:



- YouTube Advertising: Our budget has doubled from this time YoY for YouTube, but we are seeing significant increases in CTR: 1.30% this year vs 0.09% last year. A significant reason for the increase is attributed to the new ad creative that we have developed this year with our video production company, Backstory.
- Paid Social: We are seeing good CTR for paid social, partially due to a \$3,700 increase in spend in September. The increases are significant: our “campers” audience increased from 11,762 clicks to 47,469 and our “outdoorsy” audiences increased from 13,729 to 32,253. All video Meta ads were significantly above benchmark with an average of 2% (0.90% is travel industry benchmark).

YMCTB Social Media:

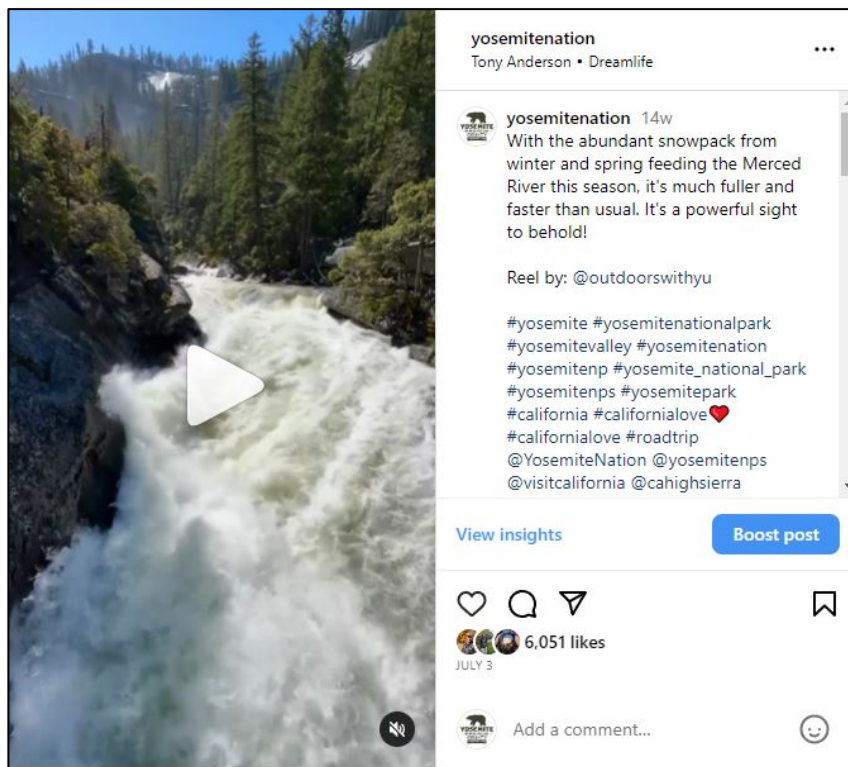
Facebook, National	Jul-Sept	Total	% to Goal
Followers	2,385	141,343	35%
Link Clicks	803,107	803,107	55%
Facebook, Local	Jul-Sept	Total	% to Goal
Followers	34	2,539	--
Instagram	Jul-Sept	Total	% to Goal
Followers	2,385	78,201	6%
Engagement	172,542	172,542	16%
YouTube	Jul-Sept	Total	% to Goal
Subscribers	280	280	64%
Total Watch Time (hours)	1,289	1,289	18%
TikTok	Jul-Sept	Total	% to Goal
Followers	4,308	18,526	74%
Views	519,718	519,718	14%
Pinterest	Jul-Sept	Total	% to Goal
Impressions	220,120	220,120	--
Engagement	5,240	5,240	--
Engaged Audience	2,870	2,870	--
X		Total	% to Goal
Followers	-397	44,573	--

We continue our paid strategy on social, particularly with the Meta platforms of Facebook and Instagram. Last year we were unable to spend our Meta ad budget at the levels we wanted to

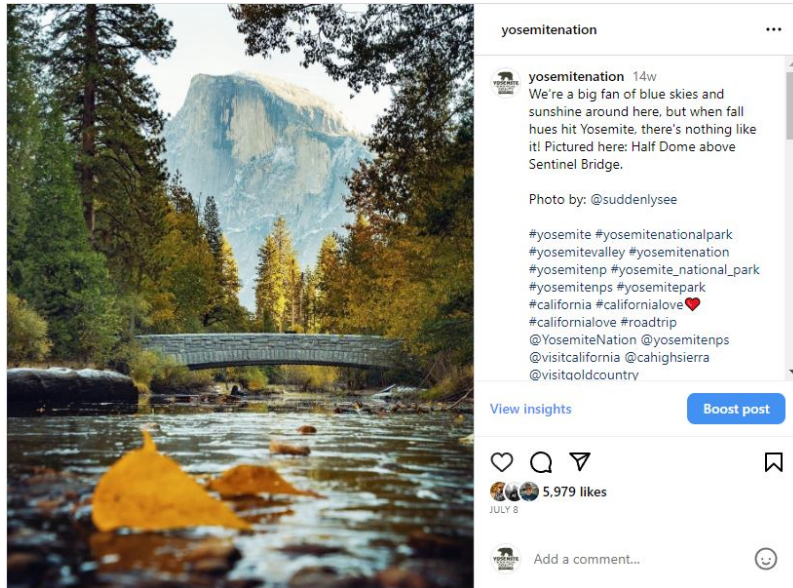
during the first half of the year. This resulted in large monthly budgets in the second half of the year. This year the budget is spending evenly across the whole year, but monthly budgets are accordingly smaller.

That said, our paid strategy on Meta platforms (Facebook and Instagram) continues to show excellent results, even at the lower monthly spending levels. This first quarter, our Yosemite Nation channel generated 20.5 million impressions, resulting in 800,645 engagements, and 803,107 link clicks. Many of those link clicks lead to Yosemite.com. Overall, our social strategy and results are pacing as expected without any big surprises. We expect strong Fall results, as autumn imagery tends to perform exceptionally well on our social channels.

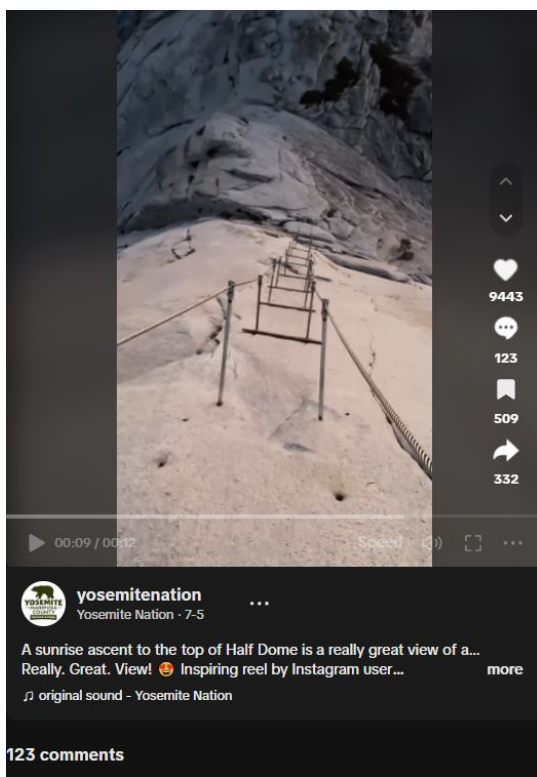
We are also constantly on the lookout for changes in the Social Media landscape. We set up an account on Meta's new Threads platform when it burst onto the Internet and tried a few posts there before determining that it was not going to maintain its initial pace. We are also monitoring the trajectory of X (formerly Twitter) as it continues to evolve. Many advertisers and DMOs have abandoned the platform due to its controversial content. We will continue to monitor the platform and adjust our tactics as necessary.



This is our top performing organic Instagram post, focusing on the fantastic runoff that the park was experiencing after our wet winter. 7,359 engagements, 6,051 likes, 969 shares.



This is our 3rd highest-performing Instagram post, highlighting the strong performance of fall imagery on our social media platforms, and our efforts to encourage people to start planning for an autumn visit. 6,260 engagements, 5,982 likes, 857 shares.



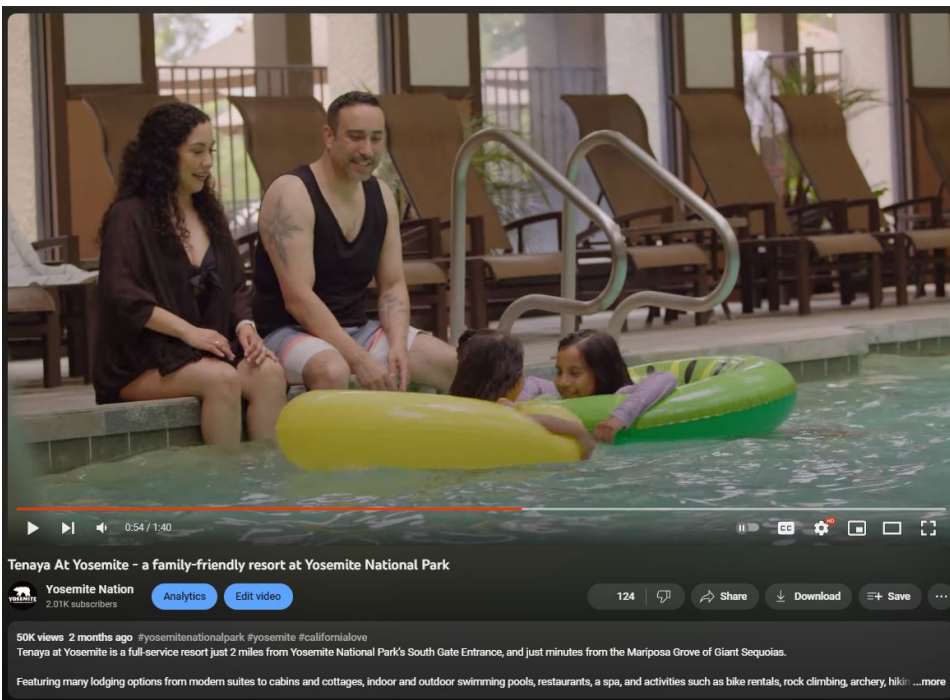
This is our top performing TikTok post, combining a great soundtrack & message with an amazing first-person sunrise over the high Sierra. 198,200 views, 9,443 likes, 894 shares.

Video Production

Some highlights for this reporting period:

- We posted 20 vertical videos to YouTube, Instagram, and TikTok.

- We completed our Fall 15 and 30-second videos
(<https://www.youtube.com/watch?v=Z1YfBgDPRwk&feature=youtu.be>)
- We posted and promoted a Tenaya at Yosemite sizzle reel
(https://www.youtube.com/watch?v=_dlmx98l2qc&feature=youtu.be)
- The latest Modern Day Pioneers video focused on The Redwoods is wrapping up production. We expect to release it in the very near future.
- Due to the evolving nature of vertical video content and the platforms it is shared on, we are engaged in ongoing efforts with Backstory Creative to hone our vertical video style and presentation.
- We have 8 regional videos in pre-production. Scripts have been completed, and we're gathering assets and voice-over talent to move into production.
- We are in pre-production for the video for Mariposa County.



This was our second highest performing paid video, just behind our Fall visitation ad, which featured models and footage we created during a shoot at Tenaya at Yosemite. 50,570 views for a total watch time of 341.6 hours of viewing.

Special Offers

The Special Offers Page received over 25,000 views this past quarter. We were able to maintain over 20 specials throughout the quarter. The success of the special offers program is only possible as long as partners participate. Even if a visitor to the website does not redeem the offer, seeing the property on the special offers page gives the property attention that it would otherwise not have had when grouped with the other properties in the county.

Special Offer Hub - /yosemite-hotel-deals/

Special Offer Hub Views

25,651

↑ 417.2%

Special Offer Hub Link Click

6,910

↑ 1,357.8%

Click URL	View Off...	% Δ
https://www.yosemite.com/places-to-stay/cabins/plumbar-creek-retreat/#offers	83	1,560.0...
https://www.yosemite.com/things-to-do/leisure-activities/sierra-cider-farm-and-cid...	80	7,900.0...
https://www.yosemite.com/things-to-do/leisure-activities/ridgeline-gallery-gift/#off...	39	3,800.0...
https://www.yosemite.com/places-to-stay/cabins/yosemite-sunset-view-retreat-apa...	14	133.3% ↑
https://www.yosemite.com/things-to-do/leisure-activities/yosemite-climbing-associ...	4	-

OFFER VALID APRIL 25, 2023 - JULY 31, 2023

BIG CREEK INN BED AND BREAKFAST

10% off when booked online

VIEW OFFER →

Enter stakeholder domain

Click URL

Contains ▾ Enter a val...

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Email Marketing:

We are continuing to see good results for rebuilding our consumer email marketing list after we have purged non-responders (7,000+) in August. We had a Meta leads generation campaign running in September and will be starting a second month-long campaign in mid-October.

July 1, 2023 - June 30, 2024	Pace = 25% (Month 3 of 12)	FY23-24 Goal
New Subs FY YTD: 2,537 September: 1,116	42%	6,000

We have sent only 19 emails this first quarter of the FY, less than in the prior year due to fewer crisis communications.

We are continuing twice-monthly emails to consumers and have an average open rate of 44% (industry average is 16.8%) with a click-through rate of 1.7% (industry average is 1.6%). With the new creative services from Noble Studios, we will receive assistance in improving the look and feel of the emails to encourage more engagement.

Traditional Print:

- We created 13 print ads in the first quarter of the FY. Publications included California Climber, Alpinist, National Parks Magazine, Group Tour Magazine, Sactown, Mariposa Gazette, Anventure Sports Journal, Condé Nast Traveler, and the Bay Area News Group. The majority of these placements utilized our current animal creative (such as Condé Nast). When the situation warranted – for climbing and outdoor sports outlets, for instance – we selected background imagery more appropriate to the topic.

Condé Nast:

Alpinist:



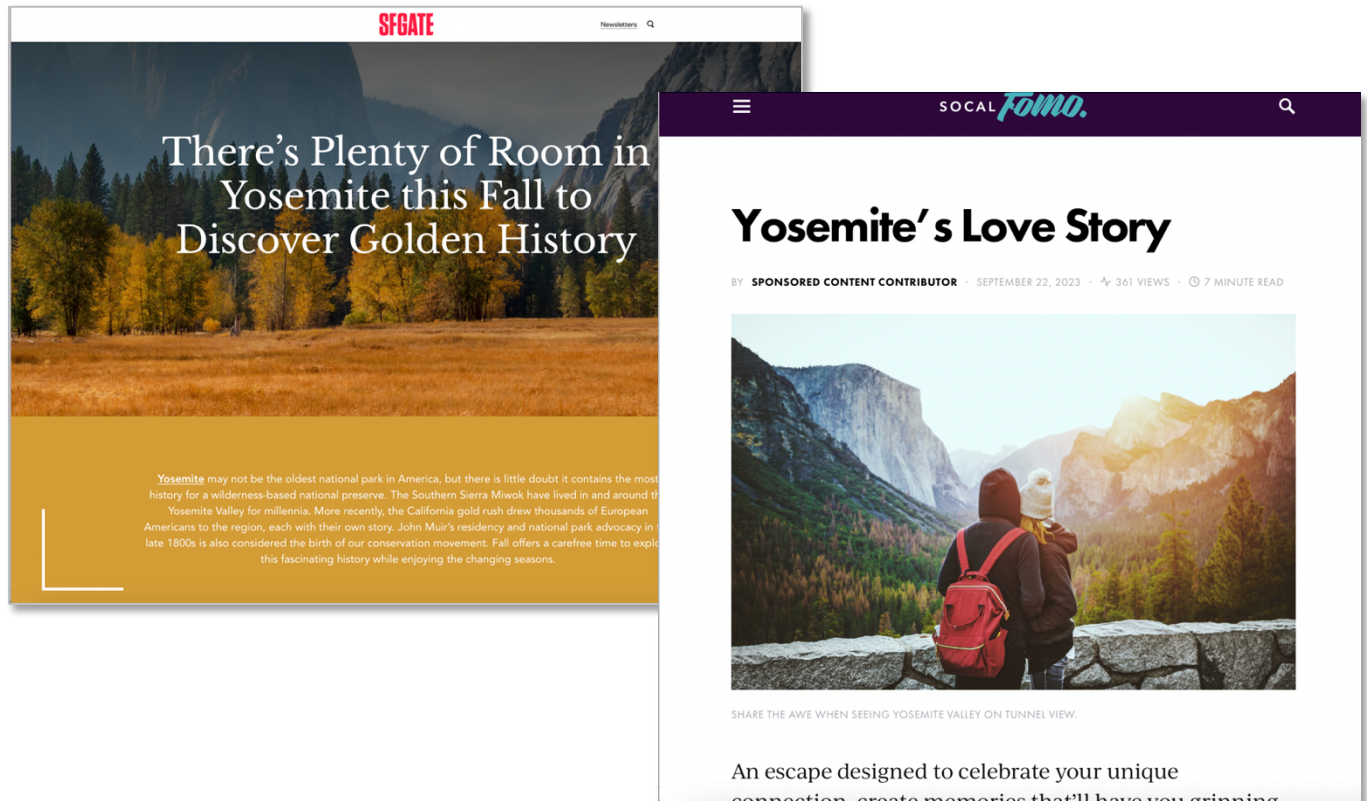
- We expect to improve on our creative as the creative agency starts the process of refreshing our brand creative and developing new assets.

Traditional Radio:

For our fall advertising campaign, we condensed our messaging to run two, high impact weeks of radio on the following Bay Area stations: KOIT, KCBS, KLLC and KMQV. We look forward to having our new creative team work on these ads to improve their efficacy.

Native Advertising:

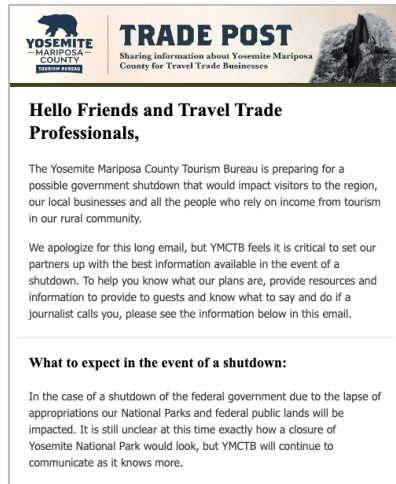
We have several native advertising co-ops running in SFGate, Southern California News Group's "FOMO" section and will soon post another Southern California News Group native article in "The T.E.A.". Staff work with the writers for the media outlet to develop articles covering both the season and the co-op partners.



Communications & Media Relations Update:

- **October Federal Government Shutdown Planning:**
 - A major focus for the YMCTB was creating a plan for the organization to pivot and promote through the potential of a full or partial closure of Yosemite National Park due to a government shutdown. YMCTB worked to research past shutdowns, followed the developing situation closely and communicated all it could learn as often as possible with our business partners, trade database and our contracted digital agency and international partners.

Examples of the communications sent to our partners are below.



YMCTB developed plans to promote through a government shutdown by either pivoting to share all of the great things to do in our gateway communities outside of the park which would remain open – or – softly encouraging visitors to go to Yosemite and recreate responsibly while injecting our Nature Rules messaging into posts.

YMCTB's plan for promotion was not needed and the shutdown was averted, but there is still a potential for a shutdown if funding is not secured after November 17. Because we have already gone through the exercise of planning for a shutdown, we are better prepared to repeat this cycle again in November.

It is worth noting here that our partners with Yosemite Hospitality, Visit Yosemite Madera County, Visit Tuolumne County and the High Sierra Visitors Council were all open to working to support each other through a shutdown. We'd also like to extend a sincere thank you to Chelsie Layman for her communication and cooperation in the weeks leading up to the averted shutdown.

- FAM Trips
 - YMCTB completed four FAM trips in this quarter, all of which came in the month of September. Historically, YMCTB has not hosted FAMs between the start of June and the end of August, so we got a fast start with these four FAMs in September.
 - YMCTB's visits this quarter were:
 - CANUSA Agent FAM
9/11 to 9/12

CANUSA TOURISTIK – The North America specialist for individual trips. With more than 135 employees in seven German offices, CANUSA TOURISTIK is the largest tour operator in North America. The Fam primary attendee and contact is the Head of Product for CANUSA, Anngret Rossol. Anngret is responsible for contracting in Yosemite Mariposa County and most of North America. CANUSA produces hundreds of consumed lodging room nights in Mariposa County. There were seven travel Trade professionals with Jonathan Leading the group. The focus of the visit was heavily focused on visiting all major lodging properties in the region plus Yosemite and the town of Mariposa.



- **ADAC Reisen FAM Germany**
9/12 to 9/13

ADAC Reisen, which is a travel agency chain that belongs to the German automobile club called ADAC (equivalent to AAA). They have a network of 150 travel agencies across Germany and are specialized in mobile holidays and worldwide travel.

We hosted nine travel trade professionals who experienced an in-depth training tour of Mariposa and Yosemite. The primary contact and coordinator was Jasmine Tripp from Visit California and MSI Germany, with Jonathan leading the group.



- **Alec Scott – Sierra Magazine**
9/21 to 9/23

Alec visited Yosemite Mariposa County for the second time, this time doing a focus on rock climbing. He learned about the popularity of the sport during his last visit and pitched us on a visit focused on climbing for *Sierra Magazine*. We hosted him during Yosemite Facelift and partnered with Yosemite Hospitality to get him a climbing class set up with Yosemite Mountaineering School. He also visited the Yosemite Climbing Association Museum and Gallery in Mariposa.

- Aubrey Aquino – *California Bountiful*
9/27 to 9/28

Aubrey was an attendee of our San Francisco Media Event in May, 2023 where she met David and Dana from Sierra Cider and discussed filming a segment for California Bountiful. YMCTB supported the trip by helping to schedule the shoot through Jennifer Sweeney Communications, providing assets to support the production and acquired lodging for the production crew. There is a potential of a secondary piece resulting from this as well. We are looking forward to the episode airing in December 2023.

- YMCTB has ten Media and Travel Trade FAMs completed or scheduled during October and November.

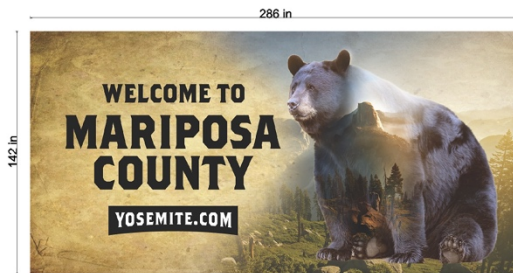
- Earned Media

- YMCTB is constantly pitching Yosemite Mariposa County through staff efforts as well as contracted domestic and international agency partners. Below are the secured placements from July 1 to September 30.

7/6/23	GLACIER POINT ROAD TO FULLY REOPEN IN CALIFORNIA'S YOSEMITE MARIPOSA COUNTY	A&M Travel
7/7/23	7 celebrity-approved hotels around the world	TravelMole Newsletter
7/21/23	YOSEMITE'S WATERFALLS AT THEIR BEST IN THE LAST 40 YEARS	Viestra
7/21/23	7 celebrity-approved hotels around the world	Travelmole
7/22/23	Seven Star-Studded Stays From Across The Globe	NI Travel News
7/24/23	Yosemite Might Bring Back Reservations as Park Is Overwhelmed With Crowds Again	WSJ
7/24/23	Top 7 celebrity-approved hotels around the world	Travel Daily
7/24/23	Where To Land A Big Catch for International Fishing Month	NI Travel News
7/24/23	POSTCARD PERFECT PICNICS	Viestra
7/25/23	Top 7 Celebrity-approved hotels around the world	Travel Daily
7/27/23	https://www.msn.com/en-gb/travel/tripideas/best-national-parks-for-hiking-12-of-the-greatest-to-explore-on-foot/ss-AA1epqLM	MSN
8/1/23	Der Zauber des Yosemite	Reise-Journal
8/3/23	Rock Climbing in Yosemite	Visit California
8/8/23	California Trip Planner	Wanderlust Magazine
8/14/23	It's Official. These are the Most Beautiful National Parks on Earth	MSN
8/25/23	6 amazing autumn activities in Yosemite Mariposa County	traveldaily.com
8/25/23	Autumn adventures in Yosemite Mariposa County	TravelMole
8/29/23	14 Fabulous Weekend Getaways in California for 2023	SheBuysTravel.com
9/1/23	The Gold Rush in Yosemite Mariposa County	International Alliance Bulletin
9/15/23	11 destinations to fall for this Autumn	Travel Daily
9/15/23	11 Destinations for fall for this Autumn	Travel Daily Newsletter
9/15/23	Halloween 2023 Events in California	Visit California
9/15/23	Best Places to See Fall Leaves in California	Fabulous California
9/17/23	What type of skier are you? Find your perfect alpine escape	Travel Daily
9/17/23	What Type of Skier are you? Find your perfect Alpine Escape	Travel Daily Newsletter
9/18/23	Leaf Peeping In US National Parks: Where To Go In October	thetravel.com
9/19/23	10 Top Places To Visit In California In The Fall	worldatlas.com
9/22/23	Californens Wilde Natur	Femina
9/26/23	These Are California's 20 Best State Parks for Fall Camping	Inside Hook
9/26/23	Yosemite tourism businesses wary as government shutdown threat looms. 'It about kills us'	Fresno Bee
9/29/23	States brace for impact of government shutdown	Politico

Collateral / Other:

- Billboard Replacement Project: Per our contract with the County, we have been working on replacing the single-sided billboard on 140 and the double-sided billboard on 132. Challenges have arisen with the contacting the owners of the properties on which the billboards currently stand. We intend to have the new billboards installed this fall.



Hwy 140, (single sided)



side 1



side 2

Hwy 132 La Grange

- Outdoor Booth: We recently completed a new outdoor booth in preparation for future consumer shows. The 10x10 booth has a brightly colored canopy, a back wall and side half-walls. We also have a new tablecloth, pull-up banner and flags. A virtual mock-up:

