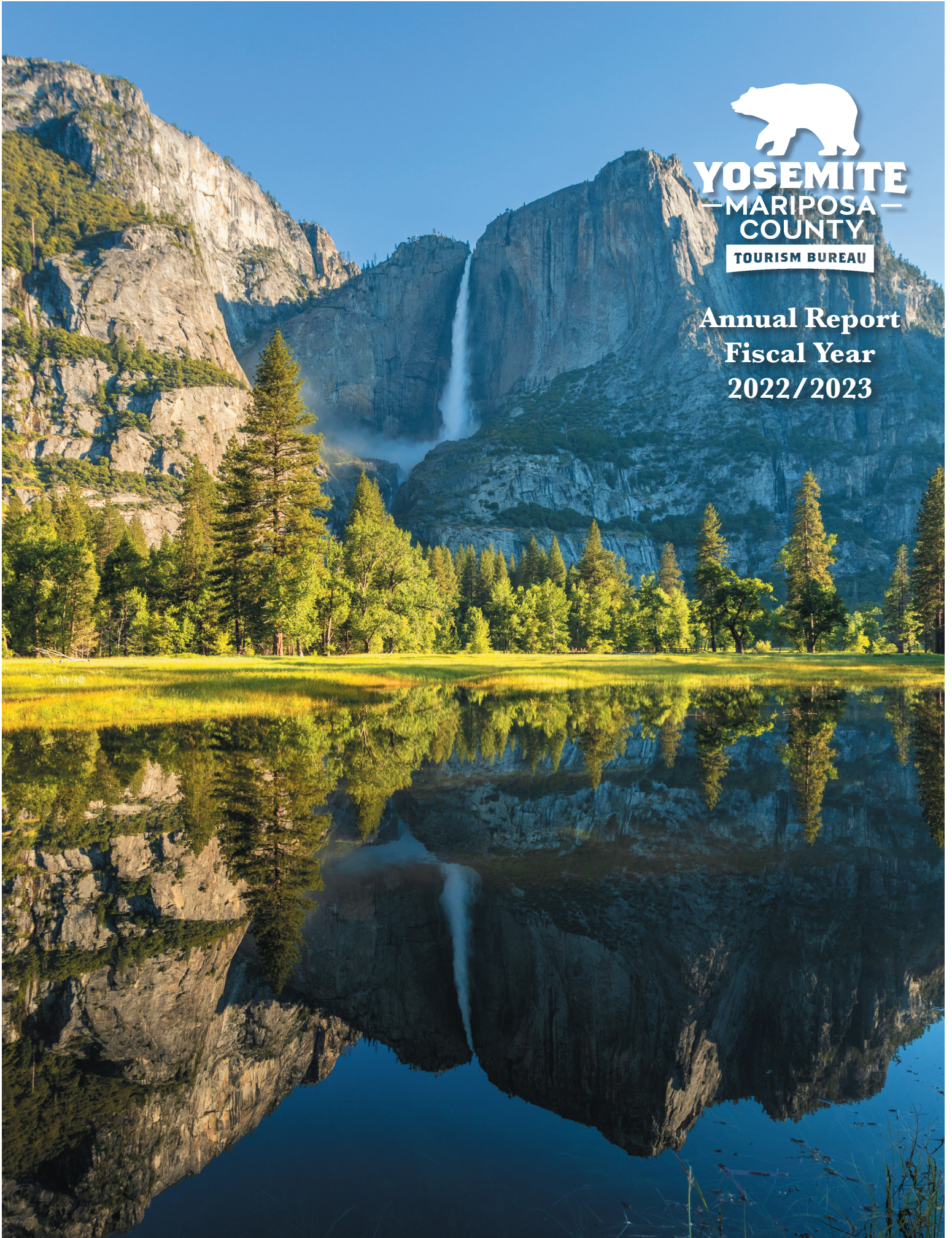




YOSEMITE
— MARIPOSA —
COUNTY

TOURISM BUREAU

Annual Report
Fiscal Year
2022/2023



Dear Lodging and Business Partners,

The 2022/2023 fiscal year was a roller-coaster for the tourism economy here in Mariposa County. The Yosemite National Park reservations system depressed travel to our region during the summer months through September 2022. Then pent-up demand in October created larger than normal visitation for that time of year.

A few months later, the record-breaking winter weather turned tourism on its head yet again as the park closure for historic snow amounts in Yosemite Valley- and then potential flooding - provided some uncertainty for potential visitors. As a result, late winter and spring visitation was virtually cut off.

Additionally, the month of February 2023 experienced good weather, but visitation was limited due to a last-minute implementation of a Yosemite NP vehicle reservation system to limit vehicle congestion related to the Firefall/Horsetail Fall event. The short notice caused significant cancellations of planned visits to the region's lodging businesses.

The historic snowpack kept waterfalls flowing long into the summer creating high demand for Yosemite Valley visitation, but High Sierra travel and visitor disbursement from the Valley was challenged as Highway 120 was closed due to road damage. Glacier Point Road and Tioga Pass were delayed in opening due to construction and snow. Tioga Road, in particular, did not open until July 22nd.

Despite these ups and downs, YMCTB remained adaptable, doing our best to meet all of these challenges with appropriate messaging and tactics. Overall, TOT collections fell short of previous year collection due to the peak season vehicle reservation system in Yosemite as well as impacts from the Oak and Washburn fires. The following are some of our accomplishments for 2022/2023.

Our BRAND NEW Yosemite.com!

First and foremost, I want to acknowledge the significant work completed by YMCTB staff and our digital agency Noble Studios in creating and launching what we feel is an award-winning new website! The website is a \$200,000 ground-up new build, replacing the previous website that had only been mildly refreshed during the last 11 years. We encourage you to explore the new www.yosemite.com website. There are thousands of pages of content and

information that assist visitors in choosing Yosemite Mariposa County as a key destination to visit over other regional and state destinations. The website's number one goal

is to drive lodging and business referrals, conversions and bookings on lodging & business websites. These bookings ultimately result in strong TOT and tax revenues for Mariposa County.

Destination Vacation Planner

We have also completely reworked our vacation planner. The new planner is organized around eight regions within Mariposa County - four inside the park and four outside the park. These different regions help YMCTB explain the breadth of places to stay and things to do throughout the county. This new direction took significant work over two years to create new maps, new written content and design a brand new 94-page document. The regional approach is also found on Yosemite.com. The vacation planner is intended to have a long shelf life and be used by potential visitors for current and future travel.

International Visitation

International visitation represents 25% of all tourism travel through Mariposa County. Specifically impacting visitation to our region during late summer and fall. Although not fully recovered as a segment, YMCTB staff canvassed our key in-bound countries with sales and marketing efforts. In-person visits included sales and travel trade meetings, travel agent and call center trainings, and consumer events in thirteen cities, including key locations in the United Kingdom, Denmark, Sweden, Norway, Germany & Switzerland.

YMCTB also maintains contracted highly effective sales and public relations / earned media offices in the UK, Germany, Australia, and Scandinavia. Although international visitation is only back to 55% of pre-pandemic levels in the US, California



and Yosemite Mariposa have experienced a higher level of return due to our direct and paid media efforts, seeing return visitation of up to 85% of pre-pandemic levels from the UK.

Paid Social Media

Social media companies have continued to shift their algorithms and processes. To meet these changes in 2022/2023 required a significant shift from organic posts to paid social advertising. YMCTB staff were able to continue to grow social media followers and maintain positive engagement on important channels, specifically Meta (Facebook and Instagram), YouTube and TikTok. This has been so successful that we have condensed our multiple strategies per channel into an overarching social marketing initiative.

Mariposa County Content and Creative Assets

In line with our goals for distinguishing the different regions around the county, we have written website articles that focus on activities outside the park or those less-visited areas inside the park. We have also invested in new creative assets – both photos and video – that emphasize both the park and the beauty and opportunities outside the park. The cover photo as well as those on our “Goals” page are from a photo shoot in June 2023.

Looking forward to 2023/2024, there are several important items to note:

YMCTB 2023/2024 Budget

Overall, YMCTB’s revenue forecasted budget for the coming year was increased slightly in anticipation of higher summer revenues with no park vehicle reservation system. YMCTB will also use prior year cash reserves to add marketing tactics to increase fall, winter, and spring tactics as well as off-set inflation or rising cost of paid media. Although the county contribution to YMCTB is less than 10% of pre-COVID amounts, the 1.5% TBID is helping ensure “off-season” lodging and visitation, revenue and taxes to the region is aggressively promoted by YMCTB.

New Creative Agency

With the increase in TBID funds over the past four years and the demand this put on our small staff, YMCTB issued and awarded an RFP for creative marketing and design support services. The RFP includes a separate response for a “brand refresh,” or funds to refresh our animal creative campaign created in 2016. The overall look and feel of the creative remain solid, but after eight years of use, it

is time for an update. Noble Studios, which has been our digital agency of record since 2016, won the new creative contract in September 2023.

Increased International Public Relations/Earned Media Support

As the Yosemite Mariposa County lodging market has matured, so have the limitations on contracts or international booking access to individual lodging inventory. Our ability to “sell” Mariposa County lodging inventory to the international market has reduced, but not the need to increase exposure of international consumers to our county and Yosemite. Rather than attend significant numbers of international B2B conferences & travel trade events, moving towards impacting international earned media/editorial in-market will stimulate interest and visitation to the county and YMCTB constituents.

YMCTB’s strategy is to increase earned editorial or digital and print media written about our region. It is proven that people reading a news article or blog about our region has a profound impact over paid media and ads. In addition to the UK, our #1 international inbound market, YMCTB has added international Public Relations representation to our retained representation firms in Germany and Australia, our #2 and #3 markets. Domestically we continue to work with Jennifer Sweeney Communications, who specializes in California and domestic based editorial coverage. YMCTB has added budget for paid social media Content Creators as well.

Our strategies for the 2023/2024 fiscal year are our road map, but we always expect some detours. Yosemite National Park’s Superintendent stated this October 2023 that there will be another “Pilot Program” restricting vehicle access to Yosemite NP in 2024. YMCTB will begin early planning for this vehicle and visitation restriction. We are good at adjusting, pivoting and being nimble when world and local events dictate. We have a plan, but as always, we remain flexible. Unfortunately, it will not be possible to replace revenue and tax collections lost due to the park access restrictions. We will shift as much visitation as possible to shoulder and off-peak visitation periods.



Jonathan Farrington
CEO / Executive Director

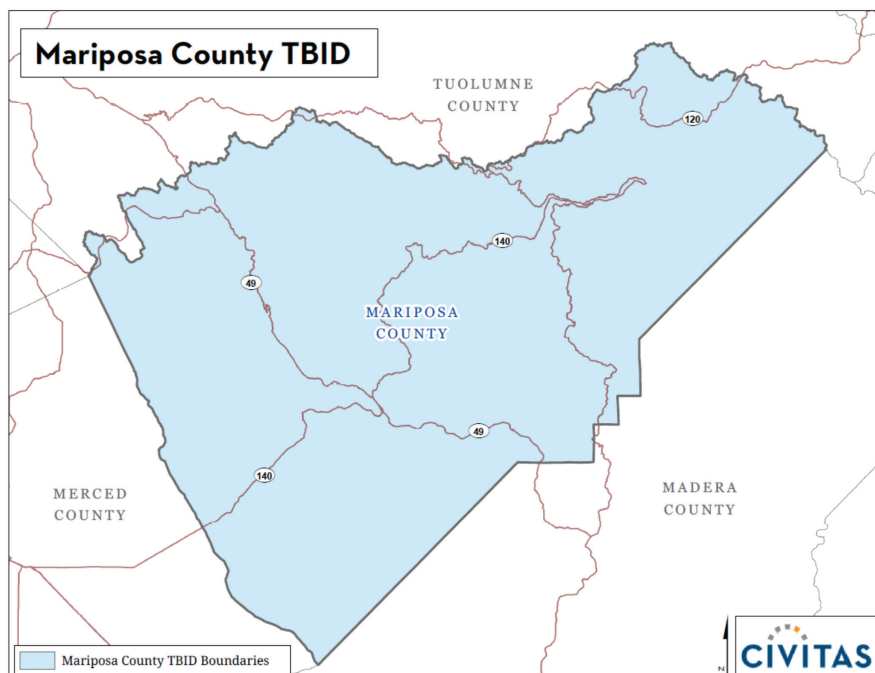
TBID Assessment

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 2023/2024 year is 1.5%.

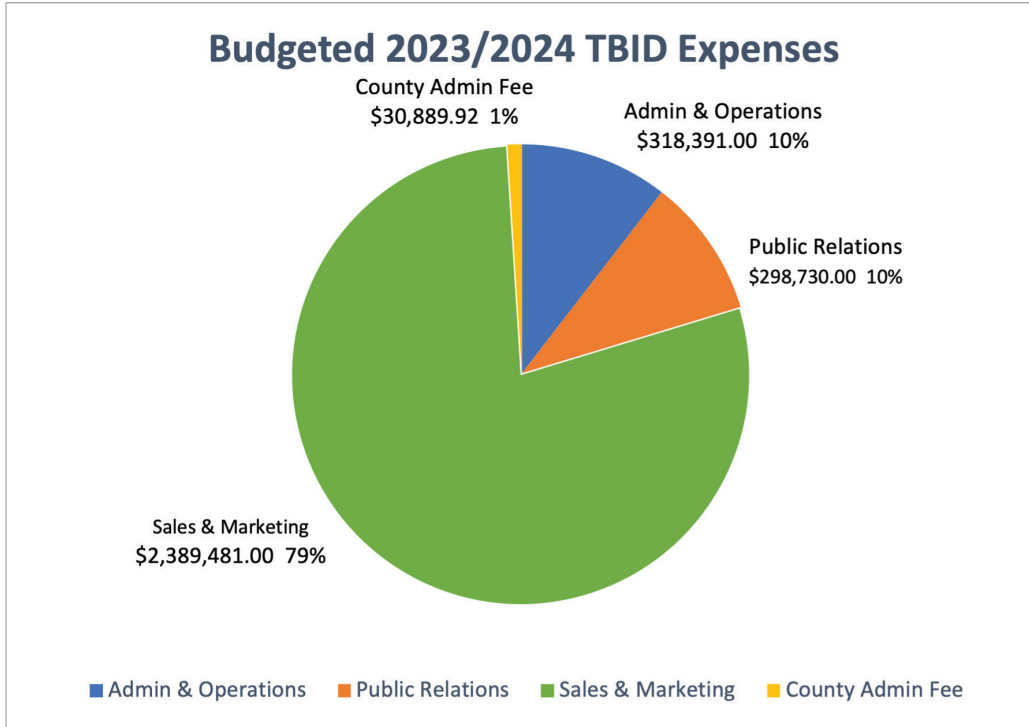
This TBID rate became fixed on December 31, 2022. 2022/2023 Mariposa County grant funding was \$50,000.

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 2022/2023 and 2023/2024 Budget

At the end of the 2022/2023 fiscal year, the Bureau had a TBID carryover balance of \$0. After spending, 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 2023/2024 budget was developed with the same intent: spend all TBID income for the year plus use prior cash reserves to reduce balances to reasonable and approved levels so that lodging partners receive maximum benefit from YMCTB's marketing efforts.



2023/2024 Annual Budget Notations

The overall YMCTB budget has increased this year by 13%, allowing the tourism bureau to increase its Sales & Marketing and Public Relations budgets by \$318,000.

A key initiative this year is to upgrade the creative used for our marketing both seasonally and from a brand perspective. An RFP was issued in early August 2023 to find a creative agency and this year's budget includes funding for both a creative refresh for the YMCTB brand and ongoing creative services and the buying of media.

In addition to the travel trade services that YMCTBs contracted international representation firms currently provide, the budget for international public relations representation has been increased. Msi in

Germany and Gate 7 in Australia will provide public relations support starting in 2023/2024. Black Diamond in the UK also currently provides both travel trade and PR services and Atlantic Link in Scandinavia will continue to focus on travel trade representation.

As always, maintaining flexibility is critical during these times as conditions can change significantly with little notice.

- Wildfires, rock falls, potential government shutdowns, extreme weather events, and other unforeseen challenges can significantly disrupt the tourism economy with little to no notice.
- The Board of Directors has given the CEO / Executive Director discretion to manage the budgeted expenses given the changing situation.

Goals for 2023/2024

YMCTB continues to monitor impacts on tourism due to the economy. International exchange rates are not favorable for long-haul travel to the USA. Obtaining a visa to enter the USA can take over 400 days, 2.5 times longer than prior to the pandemic. High fuel prices, rising interest rates, and other economic factors impact travel both by Californian's and international visitors. Rising media costs are also requiring the bureau to continue to stretch marketing funds as far as possible.

Our staff continue to update our 3-year rolling marketing strategy and plan. For the 2023/2024 plan year, we have set new goals intended to continue to increase our efficacy. The following is a summary of our goals:

1. Develop and implement new creative strategy with chosen agency. As described in the Executive Summary, the hiring of a new creative agency will provide a fresh perspective on YMCTB creative assets. The bureau has been utilizing creative developed eight years ago and it is a time for an update.

2. Continue to hone Yosemite.com As our primary asset, the new Yosemite.com is a significant improvement and very mobile-friendly, reflecting how the majority of visitors interact with the site. All websites require ongoing optimization, content updates, and other minor improvements to stay relevant as possible.

3. Focus more resources on public relations work in international markets. Our four international offices have provided strong travel trade representation. Starting this year, we will also have public relations support in Germany, Australia and the UK.

4. Host travel trade and media FAMs. Starting last year, we began to see a significant increase as FAMs (familiarization trips) for both travel trade and media. We have increased our budget to cover the additional costs of hosting these important visitors. We have also increased our budget for carefully vetted paid content creators who have a strong following on social media.



Old Town Mariposa

5. Redesign the Mini-DVP. As a complement to our newly published Vacation Planner, we will redesign our brochure-style planner used in trade shows, especially in our international markets.

6. Continue to focus our social media strategy on best practices and investment. There's one thing that is consistent in social media marketing: nothing stays the same. With constant change to algorithms, processes, features, etc., maintaining market share is a challenge. Our team consistently monitors and adjusts to create effective paid and organic posts.

7. Improve earned and owned email communications. With 60,000 subscribers, our email list is a robust and valuable marketing resource. We will continue to seek



advertising, video ads, search engine marketing (SEM / paid search), and Google Discovery Network.

10. Consumer trade shows and festivals. Consumer trade shows were a low priority during COVID-19. We will return to engaging potential visitors through consumer shows and add a new outreach component via outdoor festivals in California with a new outdoor booth created for this purpose.

11. Town meetings with constituents. This year the tourism bureau will return to holding town halls with constituents in various areas around the county. A survey will be sent to lodging and business partners prior to the meetings to gather input.

new email subscribers as well as improve our content and delivery methods. Our new creative agency support will help us improve the look and efficacy of our bi-monthly email communications with consumers.

8. Drive lower-funnel or short-term bookings through traditional media (radio and print). 2022/2023 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.

The new creative agency will be handling media buys and will provide new advertising opportunities.

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

12. Special Offers and Gift card program. The Special Offers program has matured into a key feature on Yosemite.com. We aim to maintain 20 or more special offers throughout the year. We will also pilot a new holiday promotion encouraging visitors to purchase gift cards for local lodging and other businesses for year-end gift giving.



2023/2024 Leadership

Board of Directors

Brett Archer, Board Vice Chair

Tenaya Lodge at Yosemite

Scott Randall

Wildhaven Yosemite

Kim Brisack

Coulter Cafe & Big Table Ranch

Chelsie Layman

Yosemite Hospitality

Ron Halcrow, Board Secretary

Yosemite Plaisance Bed & Breakfast

MaryAnn Huff

Community Member

Victoria Imrie

Yosemite Ziplines and Adventure Ranch

Christian Mueller

The Redwoods at Yosemite

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

Shannon Poe

Mariposa County Board Supervisor, District II

Danette Toso

Mariposa County Board Supervisor, District III

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

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

Photos:

All photos in this annual report were created during YMCTB's June 2023 photo shoot in various parts of Mariposa County.



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