

**Marketing Report – March 2026**

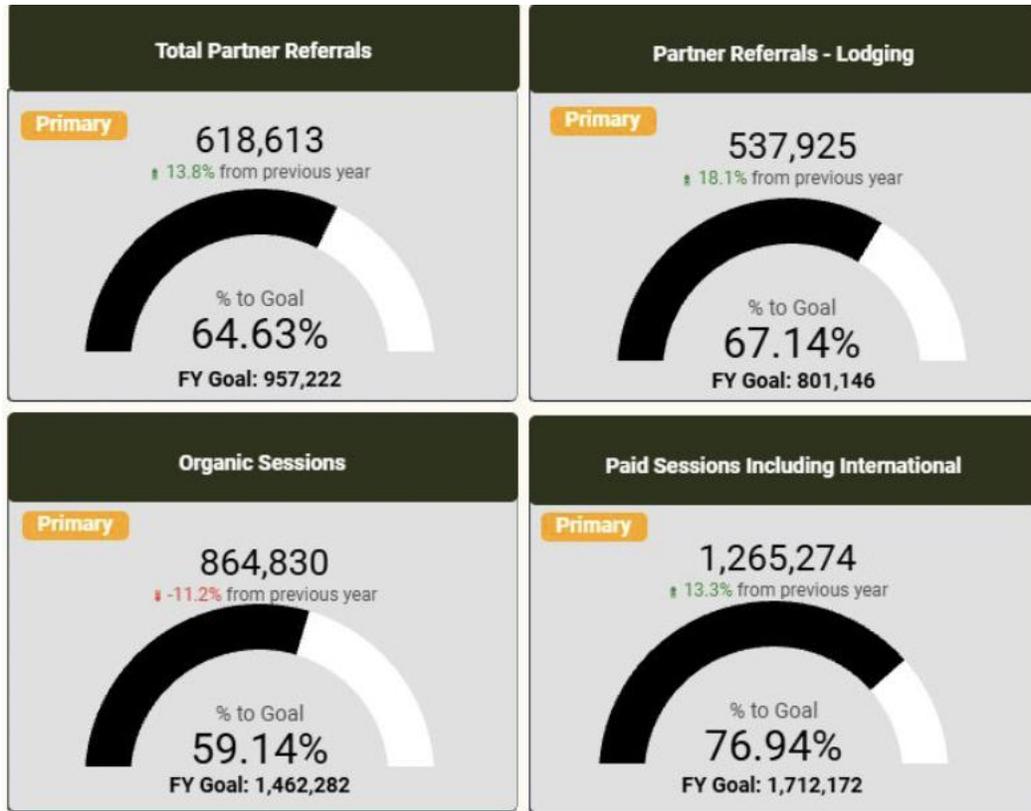
Covering January and February 2026

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## KPIs

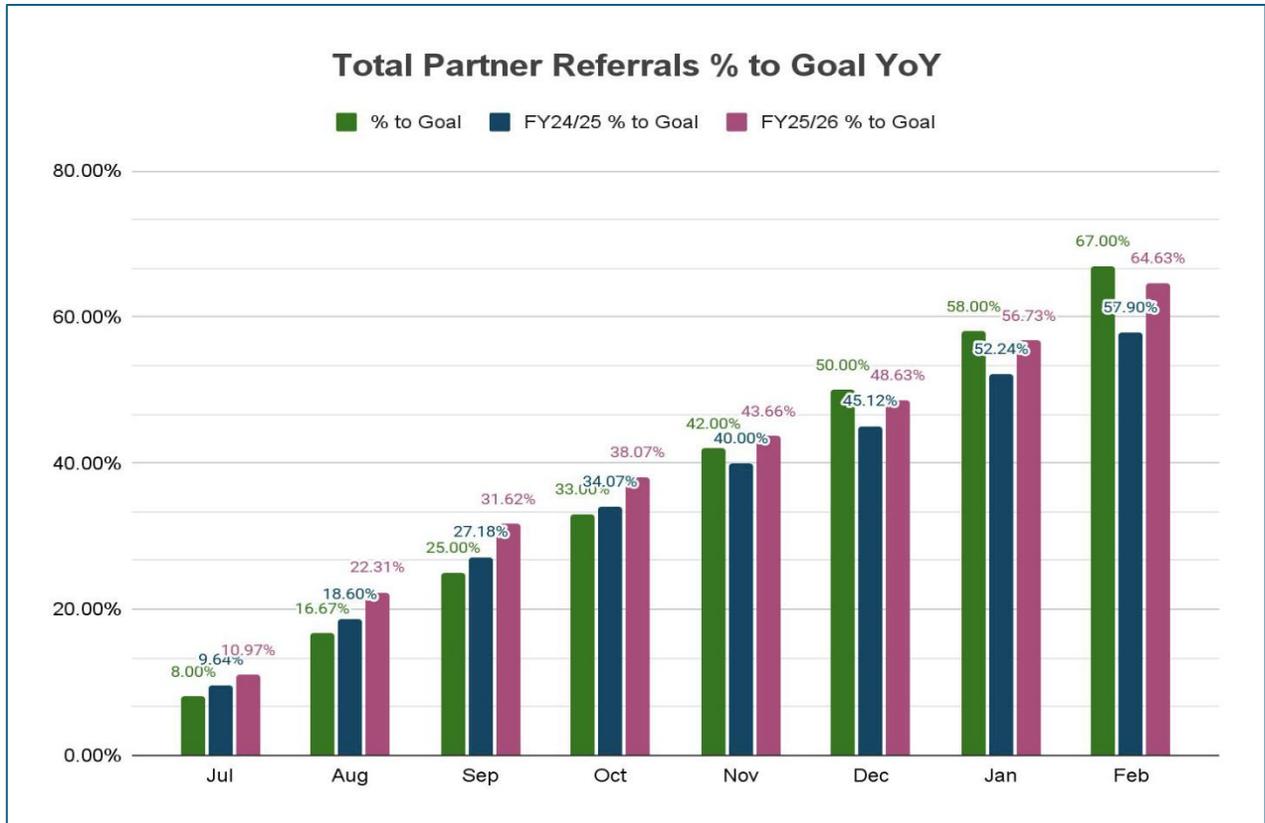
With eight months of the fiscal year (67%) completed, our primary key performance indicators show strong growth in referrals and paid traffic. As expected, organic sessions declined year over year with the rise of “zero click SERP”.

Total partner referrals reached 618,613, a 13.8% increase from the previous year and 64.63% of the annual goal. Lodging partner referrals performed even better, reaching 537,925, up 18.1% year over year and achieving 67.14% of the annual goal.



Paid sessions, including international traffic, also grew significantly to 1,265,274, a 13.3% increase from last year and 76.94% of the annual goal. In contrast, organic sessions totaled 864,830, representing an 11.2% decrease year over year and 59.14% of the annual goal. Information about organic sessions and how AI is changing organic search will be shown in the SEO section below.

The following chart demonstrates how we are pacing to last year in terms of total referrals. We continue to outpace our partner referral performance in 2024/2025.



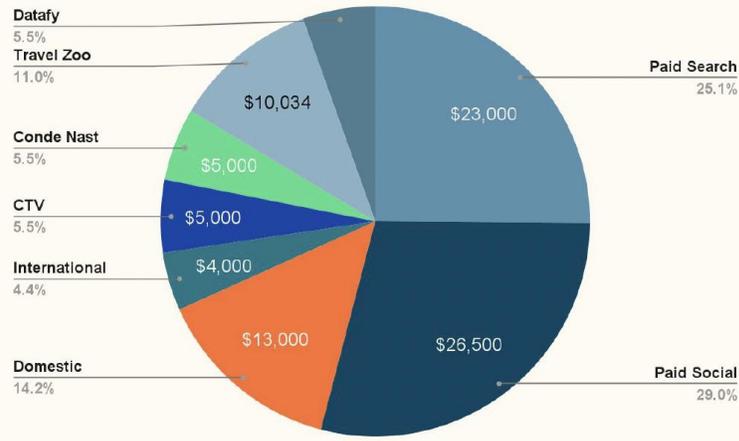
Our total referrals are nearly 7 percentage points higher than last year at this time, the largest margin for this year. Furthermore, we are only 2.37% down from the goal of 67%.

If results follow the same trends as in prior years, referrals will grow at a higher pace during the last four months of the fiscal year. Between March 1 and June 30, 2025, we added nearly 400,000 partner referrals, equal to more than 40% of the total for the fiscal year.

## DIGITAL PAID MARKETING

Our digital paid marketing tactics are our largest budgeted line items. As we ramp up toward spring, we have increased our spend significantly from January. More than half of the spend in February was in the areas of paid search and paid social, with the remainder being focused on Domestic (Display, Demand Gen and Performance Max or PMAX), International display, CTV, Conde Nast, Travel Zoo and Datafy.

## Paid Media Spend Breakout | February 2026



We have seen strong results from this greater spend. The growth in paid sessions to Yosemite.com (YTD nearly 77% to goal) along with the growth in referrals is a result of these investments.

As noted in the past, our partners at Noble Studios both monitor and adjust strategies as needed to make sure that these dollars are used effectively as possible.

### DIGITAL PAID MEDIA

We are seeing strong results in our paid media:

## Paid Media Highlights | February 2026

**+18%**

Total Domestic Display/Demand Gen/PMAX Sessions YoY  
(35,020 vs 29,778)

**+247%**

International Display Sessions YoY  
(15,566 vs 4,489)

**+85%**

Paid Social Sessions YoY  
(Noble Managed Campaigns)  
(55,257 vs 29,921)

### International Display

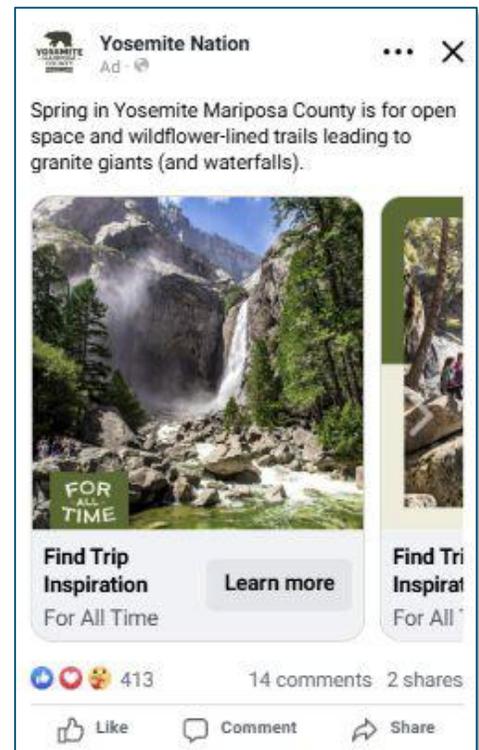
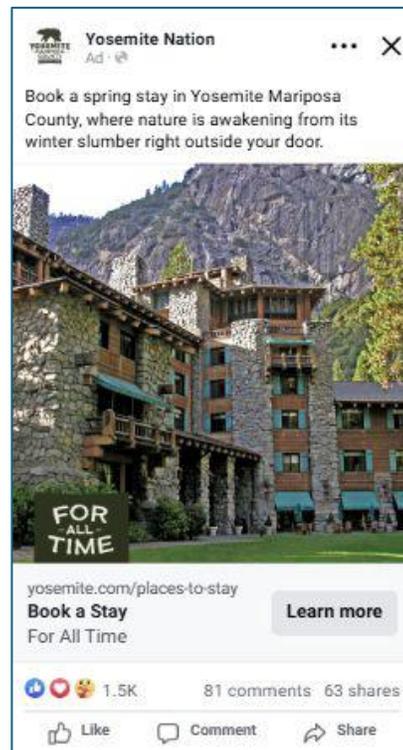
International display campaigns saw significant increases in efficiency and impact, as they drove 247% more sessions, delivered 80% more Book>Direct referrals, and saw a 114% increase in average engagement time per session. All of this at an 18% **decrease** in spend.

## Paid Social

A new approach to Meta advertising has delivered significant year-over-year performance improvements while providing clearer insight into which creative variations resonate most with our target audiences. In the past, we have created seasonal campaigns with different messaging for each audience. By running the same 10 ads, each with different messaging, across all audience segments, we've been able to effectively test and optimize performance.

- Despite a 1% decrease in spend, Meta campaigns delivered 165,671 clicks (+71% YoY) and saw 55,257 sessions (+85% YoY).
- The engagement rate increased 40% with a 52% increase in average engagement time.
- The new ads also averaged a 3% CTR (+80% YoY)

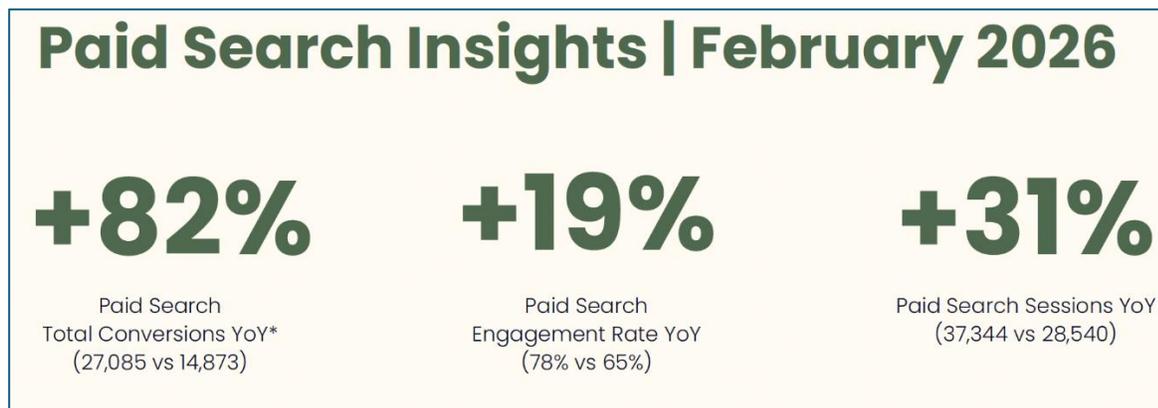
This shift has also provided a clearer understanding of which creative variations drive the strongest results. The two highest performing creative assets were the Lodging variation with the Ahwahnee Hotel and the waterfall/spring focused carousel.



### Another new approach:

While we have seen incredible results from Performance Max (Google's advertising product PMAX) over the past year, however recently Google updated their reporting tools to give us more insight into what channels PMAX is running on. Given the bidding strategy we're leveraging, PMAX has almost exclusively been running on Paid Search, which has been driving strong conversion performance, but is resulting in missed opportunities across the rest of the channels. As a next step test, we will be duplicating our existing campaign and testing a new bidding strategy to leverage PMAX in more Upper-Mid funnel channels to enable a more full-funnel approach.

### SEARCH ENGINE MARKETING (SEM) | PAID SEARCH



While the results are positive, we are also seeing a spike in cost per click. Different bidding strategies will be tested to determine if we can make our paid search process more cost-efficient.

We are continuing to exceed benchmarks on both Click Through Rate (CTR) and Conversion Rate (CVR). The benchmark for CTR is 4.68%; our average is three times higher at 14.99%. The CVR benchmark is 3.55%; our average is more than 11 times higher at 41.22%.

## YMCTB SOCIAL MEDIA

<b>Website sessions</b>	<b>Jan-Feb</b>	<b>Total</b>	<b>% to Goal</b>
<b>Aggregate session totals</b>	137,090	390,605	75%
<b>Facebook, National</b>	<b>Jan-Feb</b>	<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	4,262	176,647	193%
<b>Link Clicks</b>	127,397	496,354	70%
<b>Engagement</b>	320,394	1,345,638	90%
<b>Facebook, Local</b>	<b>Jan-Feb</b>	<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	10	3,573	--
<b>Instagram</b>	<b>Jan-Feb</b>	<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	1,414	110,955	63%
<b>Engagement</b>	33,573	240,098	28%
<b>YouTube</b>	<b>Jan-Feb</b>	<b>Total</b>	<b>% to Goal</b>
<b>Subscribers</b>	214	5,202	281%
<b>Total Watch Time (hours)</b>	4,962	29,926	241%
<b>Average % Viewed</b>	18.0%	37.6% (YTD av.)	+1.57%
<b>TikTok</b>	<b>Jan-Feb</b>	<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	924	23,359	191%
<b>Engagement</b>	16,921	34,738	102%
<b>Pinterest</b>	<b>Jan-Feb</b>	<b>Total</b>	<b>% to Goal</b>
<b>Impressions</b>	52,520	131,850	--
<b>Engagement</b>	5,700	11,520	--
<b>Engaged Audience</b>	4,650	8,940	--
<b>X</b>		<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	-66	40,388	--

Our social media performance remains strong, with most tracked KPIs pacing at or ahead of YTD goals. Our social channels also continue to contribute significantly to traffic to yosemite.com, with aggregate website sessions already reaching 75% of the annual goal. This suggests that our social media ecosystem is continuing to function effectively as both an awareness and website-referral channel.

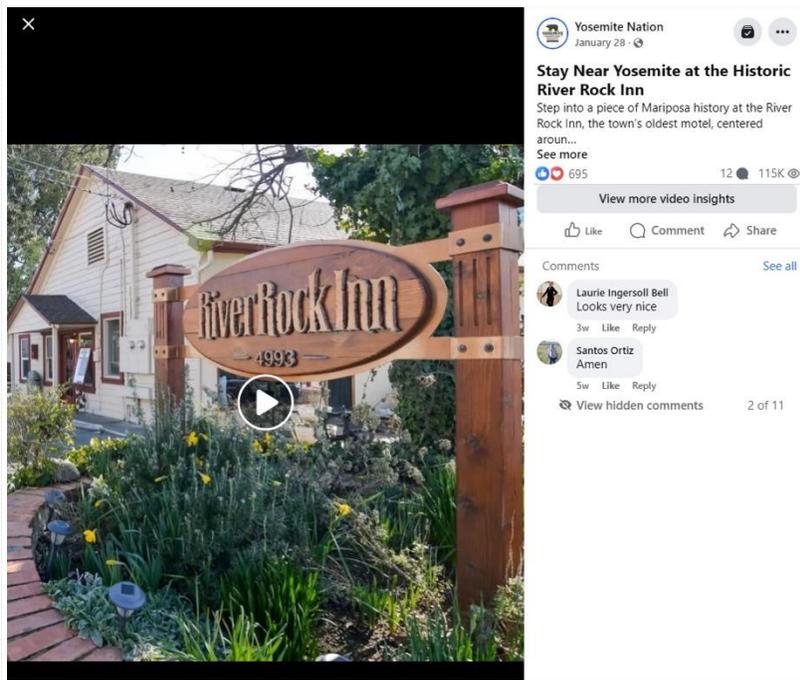
**YouTube continues to be a major strength.** Subscriber growth and total watch time are both far ahead of annual targets, and the channel's Average Percent Viewed metric remains strong at 37.6% year-to-date. Together, these indicators suggest that audiences are not only discovering the videos but continuing to watch a meaningful portion once they begin playback. The eight regional videos released this year appear to be a significant contributor to this performance, helping expand the channel's reach while maintaining strong viewer retention.

**Facebook and TikTok are both delivering reliable, above-pace results.** Follower growth on Facebook has already reached nearly double the annual goal, while engagement continues progressing toward its target. TikTok is showing similarly strong momentum, with follower growth far ahead of pace and engagement already surpassing its annual KPI. These results reinforce the role of both platforms as dependable tools for maintaining audience reach and encouraging interaction with Yosemite Mariposa County content.

Instagram is the channel being monitored most closely. Where results are pacing more slowly than we would typically expect. While follower growth continues to progress steadily, engagement has not kept pace with the platform's historically strong performance for our channels. Because Instagram has been one of our most stable platforms over time—driven largely by sharing high-quality user-generated imagery—we have not made any strategic adjustments at this stage.

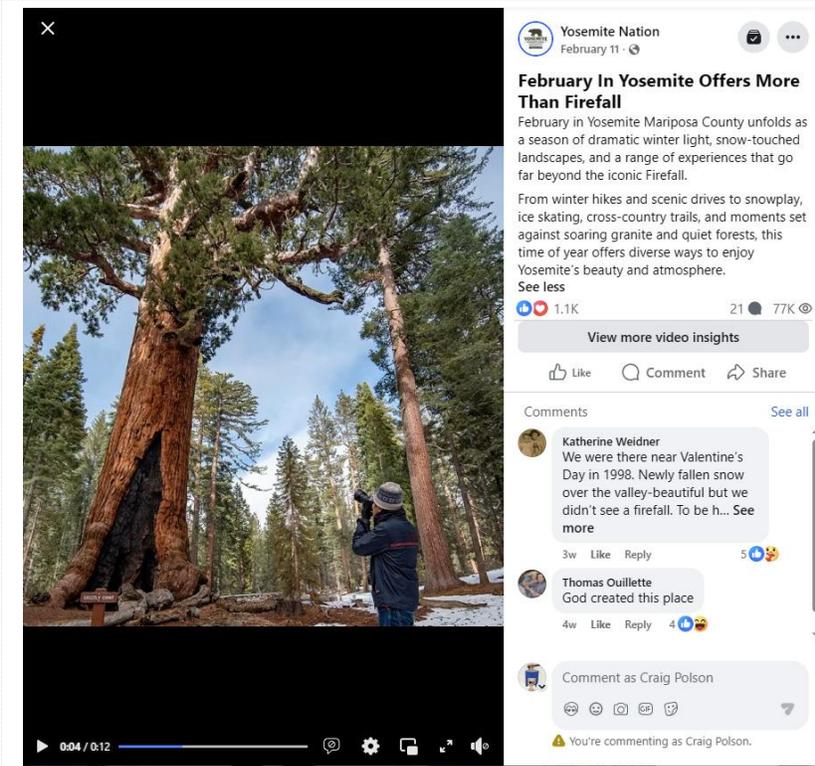
Recent reporting from social media analytics and creator-marketing platforms, including Social Insider, Buffer, and Popular Pays, has also described recent shifts in Instagram engagement patterns, suggesting that some of the variation we are seeing may reflect wider platform dynamics.

## Top Posts



This is a screenshot of a Facebook video post from the page 'Yosemite Nation', dated January 28. The video shows a wooden sign for 'River Rock Inn' with the year '1993' below it, set against a backdrop of a historic building and lush greenery. The post text reads: 'Stay Near Yosemite at the Historic River Rock Inn. Step into a piece of Mariposa history at the River Rock Inn, the town's oldest motel, centered around...'. The post has 695 likes and 115K views. Below the video, there are two comments: 'Laurie Ingersoll Bell Looks very nice' (3w ago) and 'Santos Ortiz Amen' (5w ago).

This is our top-performing paid post on Facebook, which features the River Rock Inn, with 21,041 post link clicks and 24,009 engagements.



This is a screenshot of a Facebook video post from the page 'Yosemite Nation', dated February 11. The video shows a large, ancient sequoia tree in a snowy forest, with a person in the foreground taking a photo. The post text reads: 'February In Yosemite Offers More Than Firefall. February in Yosemite Mariposa County unfolds as a season of dramatic winter light, snow-touched landscapes, and a range of experiences that go far beyond the iconic Firefall. From winter hikes and scenic drives to snowplay, ice skating, cross-country trails, and moments set against soaring granite and quiet forests, this time of year offers diverse ways to enjoy Yosemite's beauty and atmosphere.' The post has 1.1K likes and 77K views. Below the video, there are two comments: 'Katherine Weidner We were there near Valentine's Day in 1998. Newly fallen snow over the valley-beautiful but we didn't see a firefall. To be h... See more' (3w ago) and 'Thomas Ouillette God created this place' (4w ago). At the bottom, there is a comment input field for 'Craig Polson'.

This is our runner-up top-performing paid post on Facebook, which focuses on all of the other things you can do in Mariposa County in February other than Firefall. 13,763 post link clicks and 16,698 engagements.



Top-performing paid YouTube video, which provides viewers with details about Badger Pass' history, things to do, and general information. 326,751 views for a total collective watch time of 4,099 hours of watch time – that's about 5.7 months!



Top-performing organic TikTok video, showing the first big snowfall of the winter in Yosemite Valley. 43,651 views, 7,605 engagements.

## EMAIL

### Constituent Emails:

At the end of February, YMCTB staff sent a new monthly newsletter to constituents. The goal is to create regular communication on a number of topics such as visitor information, international travel, AirDNA and Datafy reports, Board meeting documents, specific YMCTB marketing results, etc. We have been sending out individual emails on these topics, combining them to one email provides a regular overview of the state of tourism and the impact of the bureau. Our click-through rate (CTR) is very good at 4.2% with the total number of clicks for all links was 135.

### Consumer Emails:

We continue to send emails to consumers every two weeks. We are now alternating our “seasonal” emails with “evergreen” ones to avoid content fatigue. We found that consumer interest was not maintained with content only focused on the current or upcoming season. So far, this strategy is working as we are seeing positive results as our CTR for evergreen emails is on par or slightly higher than our seasonal ones. We do expect an uptick in consumer email CTR as we move into spring and peak season when there is more interest in travel.

A new Meta leads campaign is scheduled for March and April. We estimate that the leads campaign will result in about 5,000 new subscribers.



## CO-OPS

Despite the strong recommendation of members of the marketing committee in December for YMCTB to continue offering co-ops, we have seen a significant decrease in participation. Only two partners chose to sign up for spring co-ops. Per the recommendation of the committee, we decreased both the number of co-ops offered and removed traditional print media options.

We are considering a different process for the next fiscal year or simply eliminating the co-ops program.

## SPECIAL OFFERS

The Special Offers Page received over 55,000 visits in the quarter. The number of visitors to the special offers page remains high due to paid campaigns via social media. While our numbers did come down somewhat from our peak of 40 special offers in December, we have maintained over 30 throughout the rest of the quarter. Keeping an offer running is more essential than ever. Our goal is to always have as many eyes as possible on constituent properties. Those advertising in the specials section get far more visitation than those who do not.

### Special Offer Hub - /yosemite-hotel-deals/ PoP

Special Offer Hub Views  
**55,026**

Special Offer Hub Link Click  
**6,735**

Click URL	View Offer Clicks	% Δ
<a href="https://www.yosemite.com/places-to-stay/hotels-and-motels/the-ahwahnee-hotel/#offers">https://www.yosemite.com/places-to-stay/hotels-and-motels/the-ahwahnee-hotel/#offers</a>	1,312	68.0% †
<a href="https://www.yosemite.com/places-to-stay/hotels-and-motels/yosemite-valley-lodge/#offers">https://www.yosemite.com/places-to-stay/hotels-and-motels/yosemite-valley-lodge/#offers</a>	936	44.4% †
<a href="https://www.yosemite.com/places-to-stay/camping-and-rv/wildhaven-yosemite-glamping/#offers">https://www.yosemite.com/places-to-stay/camping-and-rv/wildhaven-yosemite-glamping/#offers</a>	909	268.0% †
<a href="https://www.yosemite.com/places-to-stay/cabins/curry-village/#offers">https://www.yosemite.com/places-to-stay/cabins/curry-village/#offers</a>	802	39.7% †
<a href="https://www.yosemite.com/places-to-stay/hotels-and-">https://www.yosemite.com/places-to-stay/hotels-and-</a>	602	53.2% †

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## INTERNATIONAL TRAVEL TRADE

### **Mexico Sales Mission – Visit California Trade & Media Retreat**

Noel, Tourism Development Director for YMCTB represented the region at the Visit California Mexico Trade & Media Retreat, held in Mérida, Yucatán from February 17–20, 2026. The program brought together California destinations with key Mexican tour operators, travel advisors, media, and influencers to strengthen relationships and expand opportunities for promoting travel to California.

Mexico remains California’s largest international visitor market, driven by geographic proximity, strong repeat visitation, and year-round travel demand. Key outbound markets include Mexico City, Guadalajara, and Monterrey, where travel trade partnerships play an important role in packaging and selling California itineraries. Fresno Yosemite International Airport connects directly with several regional airports in Mexico in Monterrey, Guadalajara and Morelia via AeroMexico and Volaris.

The retreat format prioritized relationship-building through a mix of structured business meetings, networking events, and destination experiences. The program included one-on-one trade appointments, working sessions, and networking opportunities designed to deepen relationships between California partners and Mexican travel trade professionals.

Participation included:

- 24 travel trade buyers
- 16 traditional media representatives and 23 digital influencers and content creators

Participating trade companies included major Mexican tour operators and agencies such as PriceTravel, Despegar, MegaTravel, Travel Shop, and Viajes Palacio, among others.



### **Australia Sales Mission Update – Visit USA Expo Series**

Earlier this month, Noel represented Yosemite Mariposa County Tourism Bureau in Australia at the Visit USA Expo Series, which took place across three cities: Brisbane, Melbourne, and Sydney. YMCTB participated alongside 40 U.S. destinations and engaged with over 600 travel professionals from across the Australian market.

These events are an important opportunity to maintain relationships with tour operators and travel advisors who package and sell U.S. destinations. Australia continues to be a strong international market for Yosemite Mariposa County. Australian travelers typically stay longer, travel year-round, and are particularly interested in nature-based experiences and iconic landscapes.

In addition to the three expo events, Noel participated in the Brand USA B2B Day in Sydney, which brought together U.S. destinations and leading Australian tour operators. During the program Noel conducted 24 one-on-one appointments with operators to discuss itinerary development and partnership opportunities.

To generate engagement during the expo events, YMCTB hosted a trip giveaway each evening, helping attract agents to the booth and encouraging follow-up interest in the destination.



## TRAVEL TRADE FAMILIARIZATION (FAM) TRIPS

### Visit CA International Reps

March 18-19, Noel hosted a small travel trade mission with international travel trade representatives coordinated in partnership with Visit California.

Participants include international account directors representing key markets such as the UK, South Korea, and Canada who are visiting the region while attending industry meetings in California, alongside Visit California reps.

Yosemite Valley led by Chief Public Affairs Officer, Scott Gediman. The group then continued to Mariposa for an overnight stay at AutoCamp Yosemite and dinner in the town of Mariposa. The following morning, staff hosted a destination presentation at AutoCamp Yosemite to provide updates from Yosemite Mariposa County and deepen understanding among key Visit California international representatives. The program concluded with a tour of Mariposa's museums and a walking tour of Main Street.

This familiarization program provided an opportunity to strengthen relationships with influential international travel trade partners while allowing them to experience Yosemite and Mariposa County firsthand.

## TRAVEL TRADE UPCOMING TRAVEL – LOOKING FORWARD

### **Go West Summit, Las Vegas**

Noel will be attending the Go West Summit in Las Vegas from March 31st to April 3rd, alongside the sales team from Tenaya at Yosemite.

To date, Noel has approximately 40 scheduled one-on-one appointments with international tour operators, receptive operators, and travel trade partners across the three marketplace days. These meetings provide an opportunity to promote Yosemite Mariposa County, strengthen existing relationships, and explore new distribution channels in key international markets.

### **California Cup, Irvine**

2026 CA Cup Golf Invitational, taking place April 12–17 in Irvine, California. The upcoming California Cup is expected to feature one of the most robust and diverse buyer rosters in the event's 23-year history, bringing together approximately 40 qualified travel trade clients and 80 total participants. The program also includes leading receptive tour operators such as ATI, Bonotel Exclusive Travel, and New World Travel / AlliedTPro.

In addition to the traditional tour operator and golf specialist participation, a new meetings and incentives buyer segment has been introduced this year, including planners from organizations such as HelmsBriscoe. This represents a valuable opportunity to engage directly with qualified meetings buyers while continuing to build

## TRADITIONAL SALES: GROUPS & MEETINGS

Since our last update, two small meetings inquiries have been received and directed to lodging partners for follow-up:

- Fresno Association of REALTORS® Leadership Retreat (Sept 2026) – 32 attendees requiring lodging, meeting space, and catering.
- Small Corporate Meeting (May 2026) – 18 attendees with 10 sleeping rooms; planner sourcing through Cvent with introductions facilitated to properties.

To further strengthen our meetings and group business development efforts, Noel recently joined the industry associations Meeting Professionals International (MPI) and Religious Conference Management Association (RCMA). YMCTB staff are considering participation in MPI's annual WEC conference this June in San Antonio

to meet planners, strengthen industry relationships and gain insights into emerging trends, best practices, and strategies relevant to growing meetings and group business for the destination.

Noel also had the opportunity to meet with representatives from the DMO Alliance of California, a network of California destination marketing professionals focused on Groups and Meetings, during this year's Visit California Outlook Forum.

These memberships and industry connections will help expand our access to meeting planners and group organizers while strengthening relationships within the broader meetings and conventions community.

On the marketing side, our strongest-performing LinkedIn content this quarter highlighted AutoCamp Yosemite as a non-traditional retreat venue near Yosemite National Park, generating a 16.2% engagement rate and 11% click-through rate, indicating interest in unique retreat environments among planners. We have more such posts planned and will continue to build our audience of meeting planners on LinkedIn. During our annual strategy summit with Noble Studios, we also discussed the potential for a targeted paid campaign focused on meetings and groups business, along with continued updates to our group sales materials.

## COMMUNICATIONS & MEDIA RELATIONS

### Upcoming Media FAMs

April – Lauren Breedlove (Outlets: Lonely Planet, Travel + Leisure, Fodor’s)

May – Visit CA Playful Journeys Road Trip (5 Media and 2 Visit CA reps)

May – Black Diamond/Visit CA Group Media Fam (4 Media, 1 Rep)

September – Christina Fang (Outlets: Travel + Leisure, National Geographic Traveler, Yahoo Life)

### September - Facelift Media Event Super FAM

This media visit is designed to tell the Yosemite Mariposa County story in a way that only Mariposa County can. It connects stewardship, climbing heritage, and community experiences, while positioning our lodging partners as part of the authentic Yosemite journey rather than simply a place to stay.

Prospective Media List:

**Katie, Katherine Parker-Magyar** | Forbes, Global Traveler Magazine, National Geographic

**Erika Mailman** | National Geographic, Fodor’s, Washington Post

**Dana Rebmann** | Conde Nast Traveler, AARP, KRON Television, Fodor's

**Adam Skolnick** | New York Times, Outside, ESPN, Travel & Leisure  
Paid influencer TBD

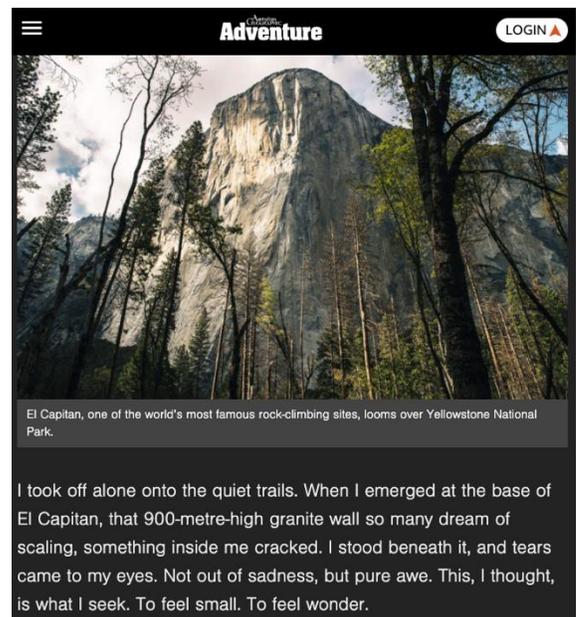
## RECENT EARNED MEDIA COVERAGE

### “Celebrate California” – Irish Mail (Print publication)

This article resulted from a media FAM in partnership with Black Diamond and Visit California. It reached a circulation of 41,700 and an estimated readership of 200,000, with an advertising value equivalent (AVE) of \$26,880.

### “[The secret ski resorts hidden inside America’s national parks.](#)” – National Geographic

Monthly traffic to the site averages around 9.2 million views.



## **“Waterfalls to desert stars: A Californian adventure of two worlds” – Australian National Geographic February 2026**

This feature originated from a meeting Jonathan attended last year at IMM. Monthly traffic to the site averages around 1.2 million views.

### **Communications Recap | [Mariposa Gazette Column](#)**

This quarter we launched a new column in the Mariposa Gazette aimed at fostering community dialogue around tourism’s role in Mariposa County. The series provides context on our region’s history, economic impact, and future opportunities, while inviting residents and local businesses to participate in shaping the next chapter of our tourism economy.

## **WEBSITE | SEO & CONTENT PERFORMANCE**

### **Enhancing Yosemite.com with AI | Mindtrip**

We’ve had several meetings with Mindtrip exploring the possibility of integrating their AI program on Yosemite.com, and conversations are ongoing.

Goals for Implementing Mindtrip:

- Develop a solution to address search challenges on the site
- Increase conversions, including partner referrals
- Enhance the overall user experience
- Replace outdated site elements with modern, efficient alternatives

Examples of DMO’s using Mindtrip:

[Visit Anaheim](#)

[Travel Nevada](#)

[See Monterey](#)

### **Performance Highlights**

Organic Sessions – Lodging Partner Referrals

Organic Sessions saw a 11% decrease in sessions YoY, but when we remove (not set) traffic organic is only down 6% YoY. Organic traffic continues to deliver a **stronger lodging PR CVR this fiscal year at 20% vs. last year at 18% despite less traffic.**





## AI Overview Presence MoM

Opportunities represent the total number of keywords where Yosemite.com ranks within the top 100 blue links but does not appear in the AI Overview (AIO), even though an AIO is present in the search results.

Examples of AIO ranking opportunities:

- rock climbing in Yosemite national park
- Yosemite rock climbing
- rock climbing at Yosemite national park

The increased focus on rock climbing is likely tied to the “Alex Honnold effect,” along with a surge in climbing-related search interest during February. Next steps include creating a new SEO-focused page recommended by Noble, to capture more of these search/prompts. The new page will link back to the Yosemite.com rock climbing pillar page to strengthen content authority and capture search traffic, ultimately directing visitors to Yosemite.com and our lodging partners.

## AI Traffic

Traffic from ChatGPT referrals continues to outperform other LLM sources with engagement and conversions. ChatGPT is also yosemite.com’s third referral source (399 session in February) with a 780% increase in referrals (132 vs 15) YoY. It is interesting that 7 out of 10 of the top ten landing pages from AI are **Places to Stay or Plan Your Trip** pages.

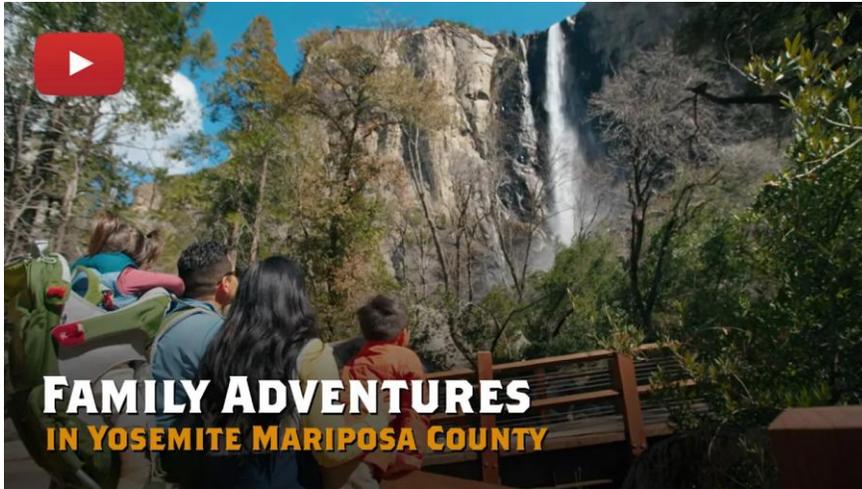
## VIDEO PRODUCTION

### Highlights for the Period (July 2025 – February 2026)

- **Released and promoted 8 region videos:**
  - Yosemite Valley
  - Glacier Point Road
  - Northern Yosemite
  - Southern Yosemite
  - Central Mariposa County
  - Northwest Mariposa County
  - Northern Mariposa County
  - Southern Mariposa County
- Completed a **History and Culture of Mariposa County** landing page video.
- Completed a **Family Adventures in Mariposa County** landing page video.
- Completed a **2026 update of our Guide to the Natural Firefall** in Yosemite.
- Completed **10 vertical videos** for TikTok, YouTube Shorts, and Instagram Reels.
- Completed **1 Peak Season ad**.
- Created **30-second and 15-second ads for Fall 2025** in vertical, horizontal, and square formats.
- Conducted a **fall foliage video shoot** in Yosemite National Park.

### Ongoing / In Progress

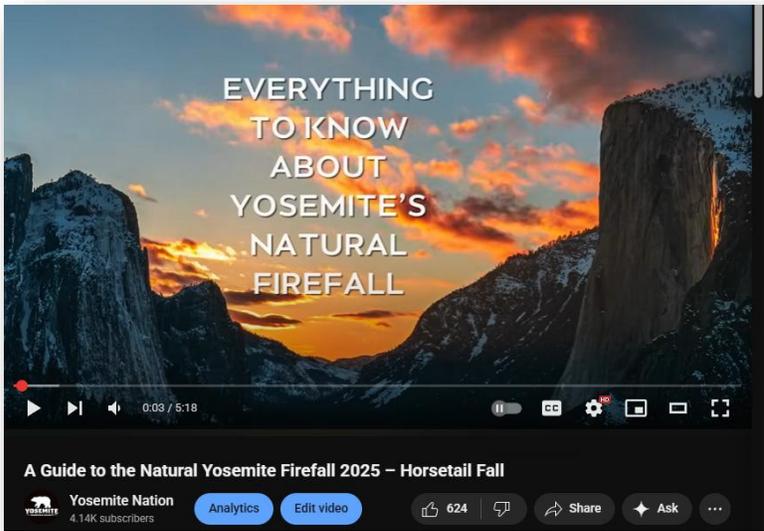
- **Working on a final edit of a new anthem video**, with a bespoke score.
- **Began preproduction on an international training video.**
- **Ongoing scheduling and planning of video shoots** to gather video assets for continued production needs and to make assets available for use by other news and marketing agencies promoting the county.



Our Family Adventures production was created to promote our website landing page for that subject.



A Guide to the Natural Yosemite Firefall 2026 – Horsetail Fall is our annual update that helps guests navigate the issues surrounding visiting for this event. This year it was important to let visitors know that the temporary vehicle reservation requirement for park entry was no longer in effect.



Top organic is, yet again, our Firefall guide, with 14k views for a total watch time of 374 hours.