

## October 2024 Marketing Report

### KPIs: (data from Noble Studios)

With the first quarter of the fiscal year completed, we are pleased to report that **all of our KPIs are exceeding our target of 25% to goal and are all up year over year (YOY)!**

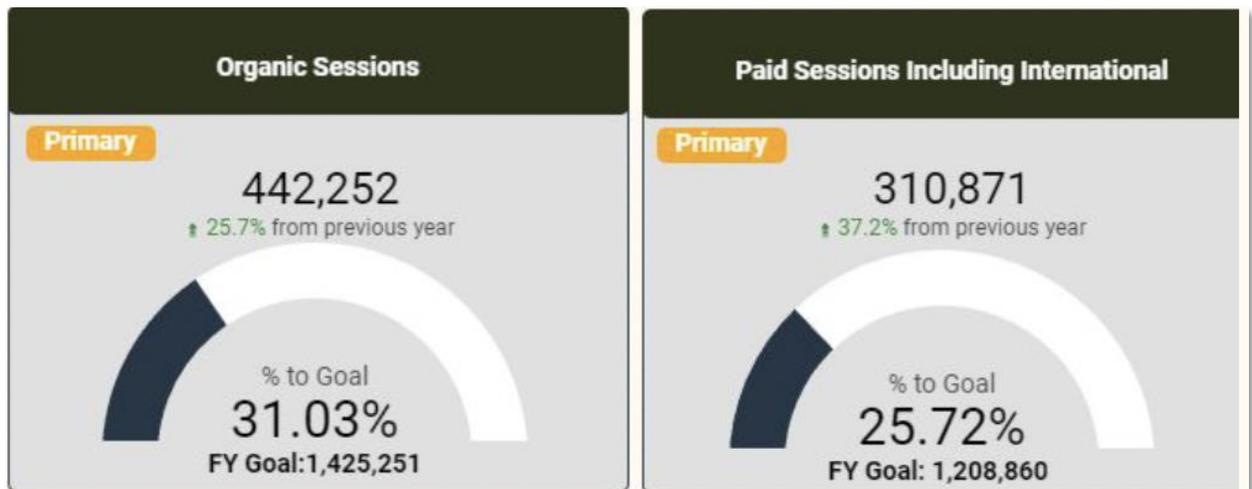
### Primary KPI - Lodging Partner Referrals

Our **lodging partner referrals** are up 9.4% from the previous year with more than 211,956 referrals out of the total goal of 823,972.



### Primary KPIs – Organic and International Sessions

Our organic sessions are 25.7% higher than last year and 31% to goal. Paid sessions including international are also significantly up 37.2% YOY and 25.72% to goal.



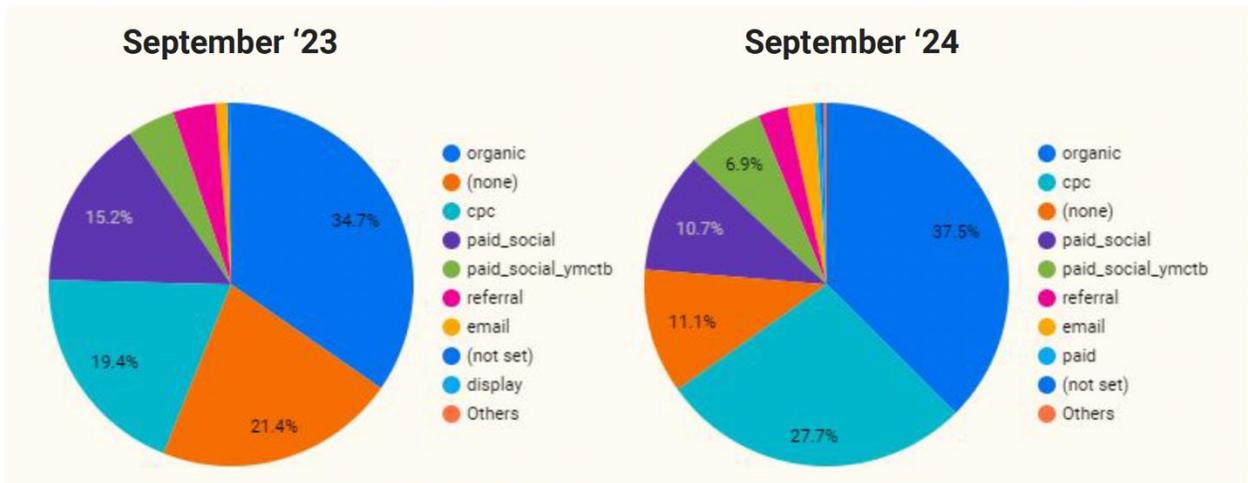
### Tracking: Non-Lodging Partner Referrals

We are also tracking partner referrals for Things to Do and Dining. Both referral areas are seeing significant growth YOY!



### Channel Breakdown

Organic search continues to be the largest traffic source, contributing 38% of the total traffic. Paid Search (CPC) follows with 28% and paid social traffic accounts for 11%.



Note that “None” means analytics can’t determine an entrance source for a particular user.

We have seen an increase in paid search as a driver to the website countered by a decrease in our paid social traffic accounts. However, paid social accounts *managed in-house by YMCTB staff* are continuing to drive a significant amount of traffic, up 457% YOY.

We are also seeing our international market sessions for the UK, Australia, Germany and Scandinavia increase 10.5% YOY.

### Traditional Print

Our traditional print strategies are directly tied into our co-op marketing. As the interest of co-op partners in print media has been waning, we have included fewer print co-op options and

more digital options. Thus our 2024/2025 budget for print is approximately half of prior year budgets.

**Yosemite Mariposa County**

# FALL FOR YOSEMITE

Drop your bags, step outside and breathe in the majesty that is autumn in Yosemite Mariposa County. No matter where you stay, awe-inspiring beauty and infinite adventures await. Whether it's a first-class resort, a family-friendly motel or a quaint cabin set within the foliage, lodging options and activities are as plentiful as the fall colors painting the scenery around you. And—with prices falling with the temperature—affordable accommodations abound, offering equal access to Yosemite's most iconic attractions and those a little more off the beaten path.

Visit [Yosemite.com](http://Yosemite.com)  
The ultimate resource for planning your adventure to Yosemite National Park. Vehicle reservations required only on weekends through October 27.

**Yosemite Hospitality**  
Stay in the heart of Yosemite National Park and be steps away from all the magic of Autumn! Stay at the iconic Adventure, the family-friendly Yosemite Valley Lodge or the historic Curry Village. Be close to nature in Hoopoe Camp or back in Victorian charm at Wawona Hotel. Book today and enjoy the ease of staying inside the park.  
[TravelYosemite.com/lodging](http://TravelYosemite.com/lodging)  
(888) 413-8869

**Yosemite Resorts**  
Create memories in nature. Surround yourself with the beauty of Yosemite National Park when you stay at Yosemite Resorts. Located just minutes from the park entrance, you'll create memories that will last a lifetime with those you care about most.  
[YosemiteResorts.com](http://YosemiteResorts.com)  
(888) 742-4371

**The Redwoods in Yosemite**  
The Redwoods offers over 115 year-round cozy cabins and spacious cottages to choose from inside Yosemite National Park. And if The Redwoods vacation home rentals are located in Wawona, just an mile from Mariposa Grove of Giant Sequoias. Book your Yosemite Cabin now and save up to 20% on your stay.  
[RedwoodInYosemite.com](http://RedwoodInYosemite.com)  
(888) 225-6666

Cathays Valley • Coulterville • El Portal • Fish Camp • Foresta • Hornitos • Mariposa • Midpines • Wawona • Yosemite Valley • Yosemite West

Sactown

**FOR ALL TIME**

# FALL FOR YOSEMITE

Experience the magic that is autumn in Yosemite Mariposa County.

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**Yosemite Mariposa County**

LA Times

**CHOOSE YOUR ADVENTURE!**

**Yosemite Mariposa County**

Outdoor activities abound year-round in Yosemite Mariposa County! If climbing 914 meters up El Capitan's granite walls is not your cup of tea, perhaps experiencing the rush at the base of Yosemite Falls is more to your liking?

Whatever your level of adventure, you can find great lodging options, itineraries and travel tips at [YOSEMITE.COM](http://YOSEMITE.COM)

JRNY (a UK publication)

**FOR ALL TIME**

# SEASONAL HUES AND TRAILS TO CHOOSE

Autumn is the perfect time for adventure at Yosemite Mariposa County. Enjoy cooler temps, thinner crowds and affordable accommodations while you experience the magic of this place in fall time, and for all time.

**Yosemite Resorts**

Create Memories in Nature. Surround yourself with the beauty of Yosemite National Park when you stay at Yosemite Resorts. Located just minutes from the park entrance, you'll create memories that will last a lifetime with those you care about most.

[YosemiteResorts.com](http://YosemiteResorts.com)  
(888) 742-4371

**Yours to Explore**

Discover Yosemite this fall. As autumn approaches, exciting Sierra adventures like climbing, hiking, and biking await just a short drive away. Tenaya at Yosemite gives you the perfect accommodations to experience the best of Yosemite - and the best vacation is always the next one. Ready to go?

[VisitTenaya.com](http://VisitTenaya.com)  
(888) 514-2167

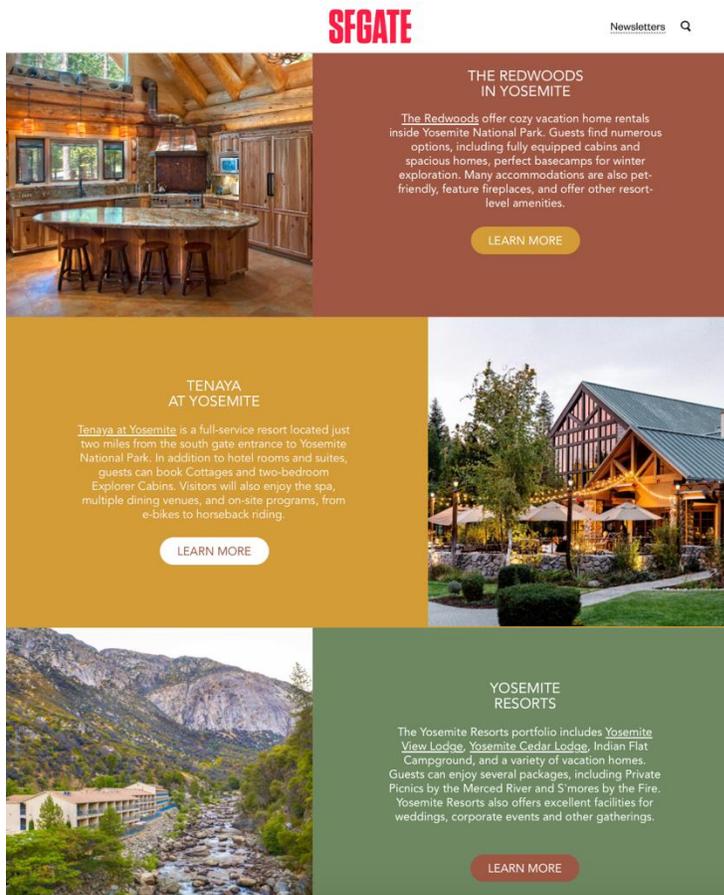
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**Yosemite Mariposa County**

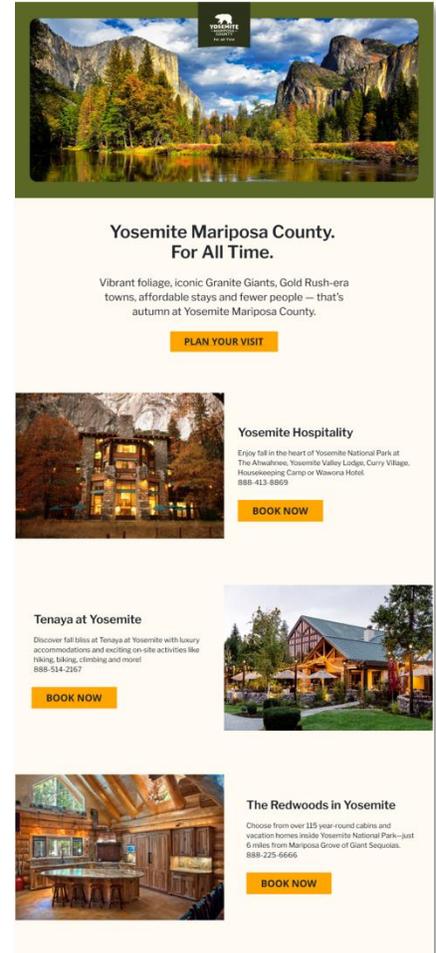
Adventure Sports Journal

## Co-Ops

Overall participation in co-ops continues to be high. As mentioned above, many of our offerings are now focused on digital offerings.



SFGate (bottom section showing co-op partners featured in story)



Dedicated email to Visit California List

## Traditional Radio

We ran two radio campaigns geared toward fall visitation. The spots started running in mid-August and continued through mid-October.

- KOIT and KMVQ in San Francisco
- iHeart Media local radio spots in San Francisco, with some coverage Sacramento. Other concurrent non-radio marketing included streaming video, a dedicated email and website banners in San Francisco, Los Angeles, San Diego and Sacramento.

**Collateral**

To support the work of Yukari Fowler at the September Tourism Expo in Japan, we published a Japanese version of our mini-DVP:

**ようこそ**

**マリボサ・カウンティ**  
カリフォルニア

**冒険心を呼び覚ます**  
ヨセミテ  
マリボサ・カウンティ

**YOSEMITE MARIPOSA COUNTY**  
YOSEMITE.COM

項目	マイル/時	所要時間
ヨセミテ国立公園入口	100	1時間
フルトン	42 (340)	1時間
マリボサ	32 (35)	45分
モントレー	187 (265)	2時間
サンフランシスコ	344 (510)	4時間45分
サンノゼ	192 (270)	3時間
サンディエゴ	397 (575)	5時間45分
サンバスター	383 (550)	5時間30分

ヨセミテ/マリボサ・カウンティ観光局  
お問い合わせ 1 (866) 425-3364

As part of our community outreach at the Mariposa Fair and CoyoteFest, a new flyer was produced to explain what the Tourism Bureau is, who is involved, how the bureau is funded and why YMCTB's marketing efforts aren't seen by the local community.

The flyer also focuses on the economic impact of tourism on Mariposa County residents. YMCTB staff have found that few residents have facts and figures about the value of tourism to the local economy and what TOT taxes cover.

**TOURISM IS MARIPOSA COUNTY'S BUSINESS**

**What is the Yosemite Mariposa County Tourism Bureau?**  
The Yosemite Mariposa County Tourism Bureau (YMCTB) is a 501(c)(6) non-for-profit destination marketing organization that promotes year-round, sustainable visitation to Yosemite Mariposa County to support Mariposa County's rural, tourism-based economy.

**What is the Tourism Bureau's primary goal?**  
To keep Mariposa County residents working year-round by promoting tourism and filling lodging businesses.

**Why don't I see the work YMCTB does?**  
Our paid marketing is focused outside of Mariposa County. Since our goal is to bring visitors to the region from outside the county, we do not place ads in our local outlets or where local residents will see them. We primarily target California, the United Kingdom, Germany, Scandinavia, and Australia. Follow @YosemiteNation social channels including YouTube to get a better look at how we market Mariposa County.

**How is YMCTB funded?**  
YMCTB receives a 1.5% TBID (Tourism Business Improvement District) tax on all "hard-sided" lodging (rights sold in Mariposa County). So, if a visitor books a hotel room, vacation rental, or B&B night for \$100, YMCTB receives \$1.50 tax on top of that room rate. YMCTB then re-invests all of that tax into marketing efforts. TBID is paid by visitors to Mariposa County, not the residents of Mariposa County.

**Who works for the Yosemite Mariposa County Tourism Bureau?**  
YMCTB is a small but mighty team of 5 staff members, four of whom live in Mariposa County full-time. The tourism bureau also contracts with numerous vendors with expertise in the area as well as a PR firm, a marketing agency of record, and four international sales agencies operating in key markets around the world. In addition, YMCTB's Board of Directors are volunteers representing the community and lodging businesses.

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**Search Engine Marketing (SEM):**

As mentioned above, our paid search marketing is responsible for 28% of our website sessions. Paid Search marketing in September resulted in a significant increase in our conversion rate YOY; our conversions increased 145% (from 20.20% to 49.58%)! Lodging referrals also increased 25% YOY (from 17,499 to 21,867).

## Digital Paid Media:

Our digital paid media includes all digital placements made by Noble Studios, including social media (Meta and YouTube), display, Google Demand Generation and Performance Max, Connected TV (CTV), etc.

## US Display, Demand Gen & PMAx

We use different types of Google ad products to create a high-performing mix of impactful ads, running display, Demand Gen and PMAx ads. While our spending in September was down slightly from the previous year, our total domestic lodging referrals increased 66%, from 1,493 to 2,481.

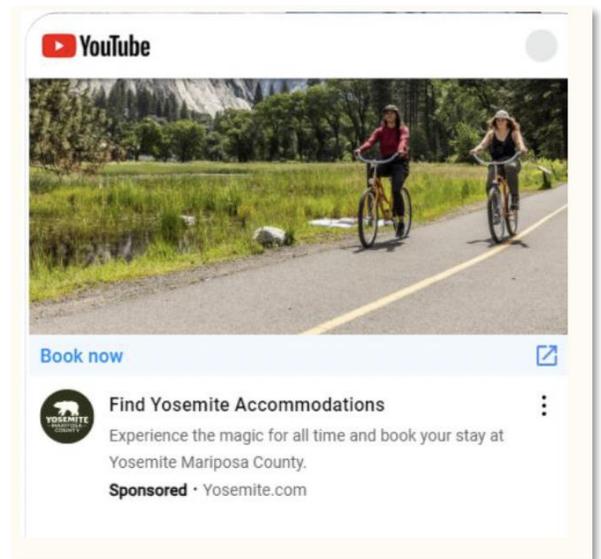
Display example:



Demand Gen example:



PMAx example:



## International Display

Despite a decrease in spend YOY, our international display saw an increase in CTR of 77% and an increase in lodging referrals from 3,550 to 285. These referrals are a "bonus" as the goal of international ads is to increase awareness and stay top-of-mind for potential visitors in the UK, Australia, Germany and Scandinavia. We know that most travelers from these countries utilize travel counselors / agents and are not making bookings on their own.

The following international display ads are currently running:



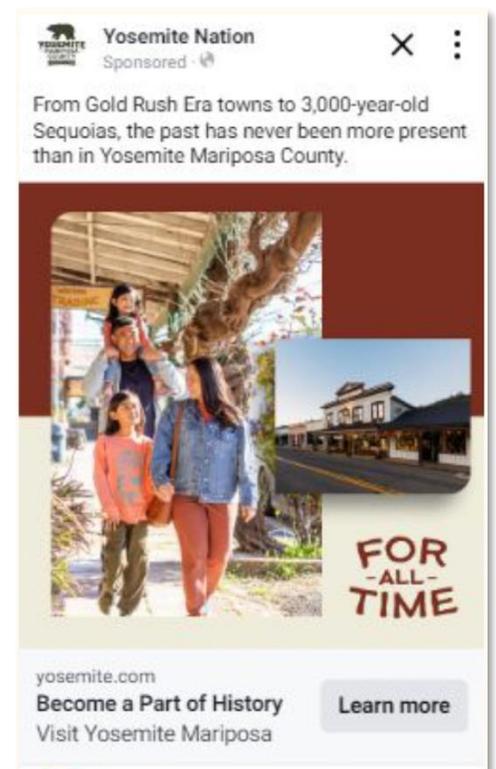
## YouTube

We continue to have good responses to our video ads on YouTube. We saw a 45% increase in the number of clicks YOY but a similar decrease in overall video views. Our YouTube spend was reduced which would account for the decrease in overall views.

## Paid Social

Noble-managed paid social is seeing a decrease in impressions, CTR and resulting referrals. The cost per click has gone up by nearly 50% perhaps due to the increase in election advertising on social channels. This CPC increase is also being seen in the paid social media managed by YMCTB.

Note: Noble will be shifting towards new creative to help combat the decrease in Paid Social.



## eCRM

With nearly 3,000 subscribers added in the first quarter, our newsletter signups are on track to meet our goal of 12,000 new subscribers by the end of the fiscal year. We started a Meta Lead Generation campaign in September and will continue that effort through October. A second lead generation campaign is planned for the spring.

We continue to send consumer emails twice a month and will soon be shifting to an updated look in line with the new YMCTB creative refresh. This new design will also be incorporated into the constituent, travel trade and media emails.

## SEO

In the early part of the year, we're ahead of where we were in organic search traffic to Yosemite.com by 25% and we are 31% to our annual goal. We are particularly pleased to see our search traffic trending so far ahead of where we were at this time last year because we fell short of our annual goal for the 23/24 FY. However, we are on pace this year to succeed our yearly goal.



A major contributor to this success is that we have more than doubled our ranked keywords (search terms that show up within the first 10 pages of Google searches) from 2,700 to 4,500 since this time last year. We also saw significant search increases to our Yosemite weather page, which we optimized several months ago.

## Content Creation

This year we've set a goal of 24 new stories created for Yosemite.com and we are on pace to easily succeed that total with 10 new stories and itineraries already added to our site. Four of these new stories are itineraries.

Below are some examples of articles we created so far this year.



## **Public Relations Efforts and Results**

Our public relations campaign is off to an incredible start with an absolutely massive earned media inclusion to start the year as we earned an inclusion for Mariposa County as a great fall destination live on the Today Show, which averages five million daily viewers and is the most watched morning show in America.

[Watch The Today Show inclusion here.](#)

Another example of great secured coverage that we received in the year's opening quarter was a 8-page spread in JRNY, one of the U.K.'s leading travel magazines. This story resulted from a FAM Trip which took place in May when we hosted the publication's Founding Editor.

Through our pitching efforts, we also received inclusions in The Telegraph, Outside.com and Outside Magazine and the New York Times bringing our total for Tier I media outlet inclusions to 7 on the year so far.

## Examples of coverage:

- JRNY 8-page spread



- [\(New York Times\) You won't be roughing it at these Outdoor Resorts](#)
- [\(Outside.com\) The Best New Hotels with Easy Access to U.S. National Parks](#)
- [\(Outside.com\) Fall is the Best Time to Travel. Go Here.](#)
- [\(The Telegraph\) Your Ultimate Guide to Yosemite National Park](#)

## FAM Trips

We've had a busy start to the year when it comes to fam trips hosting 6 trips so far, four media FAMs and two trade FAMs.

Below is a list of all of the FAMs YMCTB has hosted so far.

- Travel Counsellors – United Kingdom – Tenaya at Yosemite
  - 8/24 – 8/25
  - Co-hosted three total Product Manager guests from Travel Counsellors
- Jeff Jenkins
  - 9/8 – 9/11
  - We partnered to host Jeff Jenkins with Visit California. Jeff is a content creator focusing on showing that plus-sized people can travel and do things that may be out of their comfort zone. He is also the host of a travel show on National Geographic.
  - We have not received coverage from this visit yet.
- MSI German Media FAM
  - 9/9 – 9/11
  - We hosted three journalists from Germany on this fam writing mostly for regional news outlets within the country.
  - Coverage not yet received.



- Steffen Wagner
  - 9/10 – 9/13
  - We hosted Steffen, another German journalist, on a road trip focused itinerary that covered our entire county. Steffen was on assignment writing for Maranello World and Porsche Fahrer, two outlets focused on people who like to drive luxury sports cars on scenic drives.
  - Coverage not yet received.

- MSI High Sierra Trade FAM
  - 9/18 – 9/20
  - We hosted five travel trade professionals buying and selling travel to German trip planners. Including American Unlimited, CANUSA, Dertour, Fairflight, and TUI.



- GoPro Creators Summit
  - 9/24 – 9/25
  - We supported Visit California on this FAM trip which sent out content creators working specifically with GoPro throughout the state. Several stayed in Mariposa County at AutoCamp and went skydiving with Skydive Yosemite, which we facilitated on behalf of Visit California for this trip.

**Upcoming FAMs:**

Travel Trade –

11/11 – 11/13/2024

Gold Medal Trade FAM –

Companies – Gold Medal, Anderson Travel, Travelosophers, Ocky White Travel, and Holiday Dreams.

**Media FAMs:**

Visit California Scandi Influencer FAM

11/14/ - 11/16/2024

Four Scandinavian influencers co-hosted with Visit California

**YMCTB Social Media:**

<b>Website sessions</b>		<b>Total</b>	<b>% to Goal</b>
<b>Aggregate session totals</b>	YTD Total:	101,497	46%
<b>Facebook, National</b>	<b>Jul-Sept</b>	<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	1,777	146,518	38%
<b>Link Clicks</b>	169,689	169,689	10%
<b>Facebook, Local</b>	<b>Jul-Sept</b>	<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	39	2,916	--
<b>Instagram</b>	<b>Jul-Sept</b>	<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	5,292	100,616	112%
<b>Engagement</b>	239,536	239,536	28%
<b>Profile Actions</b>	574	574	21%
<b>YouTube</b>	<b>Jul-Sept</b>	<b>Total</b>	<b>% to Goal</b>
<b>Subscribers</b>	241	3,455	119%
<b>Total Watch Time (hours)</b>	1,401	1,401	24%
<b>TikTok</b>	<b>Jul-Sept</b>	<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	199	20,033	10%
<b>Views</b>	1,528	1,528	2%
<b>Pinterest</b>	<b>Jul-Sept</b>	<b>Total</b>	<b>% to Goal</b>
<b>Impressions</b>	60,380	60,380	--
<b>Engagement</b>		3,230	--
<b>Engaged Audience</b>	1,880	1,880	--
<b>X</b>		<b>Total</b>	<b>% to Goal</b>
<b>Followers</b>	-915	44,055	--

Our social channels continue to grow, with some of our KPIs showing unexpectedly strong results. This is a real achievement at a time when social media results are generally sluggish across industries.

As expected, our Facebook results continue to follow the platform's trend of decreased organic results while our advertising results remain strong. All indications are that this trend will continue indefinitely. Elections this fall may adversely affect our short-term advertising effectiveness both in terms of the congestion and thus higher price of the advertising space as well as public fatigue with advertising in general.

An interesting trend that we've seen over the last year or so is that while many platforms are generating lower than usual user engagement activity, Follower/Subscriber activity remains surprisingly healthy.

We experimented with humorous and trendy memes in late summer in our efforts to motivate travelers to learn about the temporary vehicle reservation system and what their options were to visit the park during this period. We posted this material to Facebook, Instagram, and TikTok with generally positive results. One of them was a top post on both Instagram and TikTok.

It's good to be able to take advantage of humorous and trendy content which engages viewers by causing them to pay attention to our message in order to "get" the joke or reference.

On the negative side, that material tends to have a short shelf life – trends that are funny and timely today are likely to look tired and out-of-date tomorrow, so the reusability of those assets is very limited. It is also notable that we have built our existing channels on a distinctly different style of content than the pithy memes we've experimented with. While those memes generated a certain amount of interest and activity with people who appreciated the change in the tone, others followers voiced their disapproval.

The social landscape is changing, and we will need to be able to adjust our strategies to fit with the platforms and with user sensibilities. However, in the short term, we have put this kind of meme content on hold while we assess the opportunities and dangers presented by making changes to our current content strategy.

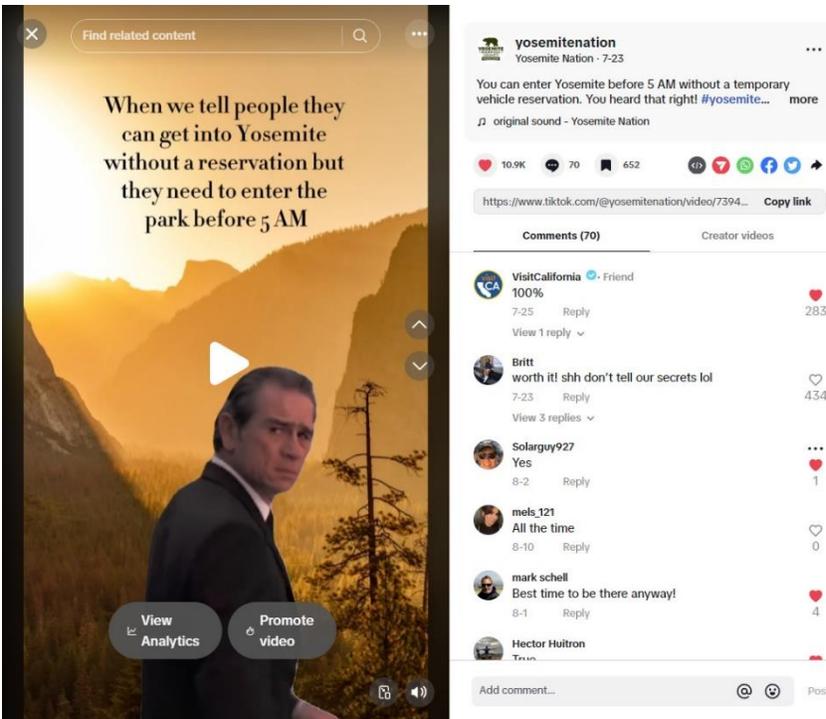
## Social Media Examples



This is our top performing Facebook ad, featuring a 6-day itinerary to visit places less traveled in the park. 18,436 link clicks.



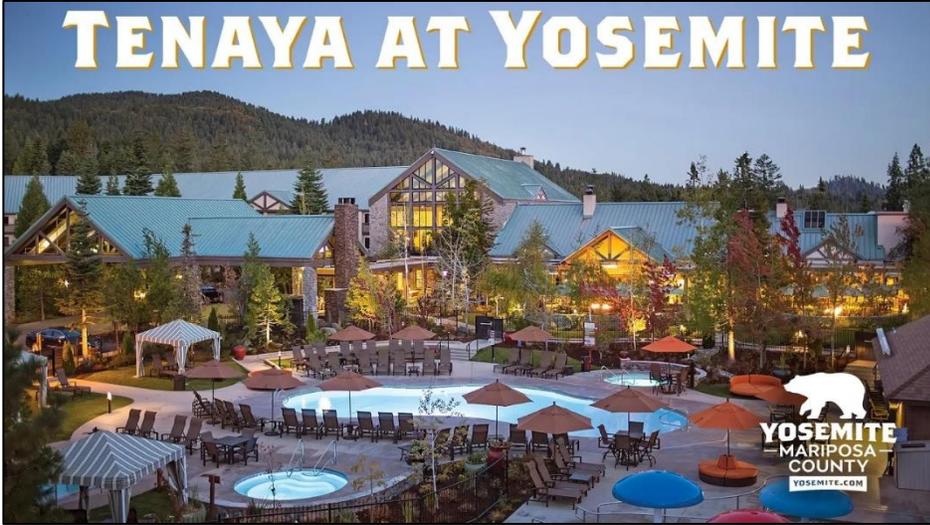
This is our highest-performing organic Instagram post. This meme, based on the Men In Black movie, encourages people that it's worth it to get up early to enter Yosemite before 5 AM when a vehicle pass is not required. 51,979 likes, 3,555 saves, 11,209 shares.



This same Men In Black meme really took off on TikTok, becoming out top organic post on the platform with 225.9k views, and 10.9k likes.

## Video Production

- We completed the HMA 2024 presentation video.
- We received more than 66 vertical videos promoting inside and outside of the park visitation. This includes delivery of newer assets related to the temporary vehicle reservation system, as well as older assets that were determined to be of lower immediate priority due to seasonality of the material.
- All 8 regional videos are in various stages of production with 4 of them nearing completion.
- We have been working with our partners at Backstory Creative to create a series of video shorts to educate area visitors on the phasing out of the temporary vehicle reservation system and to promote lodging in Mariposa County.
- We posted 23 vertical videos to YouTube, Instagram, and TikTok.
- 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.



This is our top performing organic video on YouTube. 13,202 views last quarter.

**Special Offers**

The Special Offers Page received over 101,345 visits this past quarter. The number of visitors to the special offers page has increased exponentially over the previous year’s numbers. The two-part reason for this growth is both an increased paid campaign via social media to drive traffic to the special offers page, and an organic desire by visitors to find the best deals they can get while traveling.

We were able to maintain over 20 specials offers per month throughout the past quarter. Keeping an offer running is more essential than ever with worldwide inflation. 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 are not.

**Special Offer Hub - /yosemite-hotel-deals/**

Special Offer Hub Views  
**101,345**  
↑ 46.8% from previous 92 days

Special Offer Hub Link Click  
**23,412**  
↑ 35.2% from previous 92 days

Click URL	View Offer Clicks	Pop	% Δ
<a href="https://www.yosemite.com/places-to-stay/cabins/the-redwoods-in-yosemite/#offers">https://www.yosemite.com/places-to-stay/cabins/the-redwoods-in-yosemite/#offers</a>	11,139	19.2%	↑
<a href="https://www.yosemite.com/places-to-stay/bed-breakfast/blackberry-inn-bed-breakfast/#offers">https://www.yosemite.com/places-to-stay/bed-breakfast/blackberry-inn-bed-breakfast/#offers</a>	3,746	309.8%	↑
<a href="https://www.yosemite.com/places-to-stay/hotels-and-motels/tenaya-at-yosemite/#offers">https://www.yosemite.com/places-to-stay/hotels-and-motels/tenaya-at-yosemite/#offers</a>	2,673	-	
<a href="https://www.yosemite.com/places-to-stay/wildhaven-yosemite-glamping/#offers">https://www.yosemite.com/places-to-stay/wildhaven-yosemite-glamping/#offers</a>	1,679	113.6%	↑
<a href="https://www.yosemite.com/things-to-do/mariposa-county-visitor-">https://www.yosemite.com/things-to-do/mariposa-county-visitor-</a>	929	90.8%	↑

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

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### **Remaining 2024 – 2025 Trade and Media Events**

CalTravel	Sep-24
IMEX	Oct-24
Brand USA Week - London	Oct-24
Japan: TEJ 2023 Osaka Club California Japan	Oct-24
VCA LA Media Event	Oct-24
IMM	Jan-25
Scandinavia Sales Days	Feb-25
VUSA Australia	Feb-25
Swansons Oslo	Feb-25
Outlook Forum	Mar-25
Visit CA Euro Media/Trade	Apr-25
Visit CA Denver Media	May-25
Visit CA Mexico Reverse Trade/Media	May-25
IPW	Jun-25
PRSA Travel & Tourism Conference	Jun-25

### **International Representation Recap 2024 – 2025 Deployment**

- Retained International continues to primarily focus on:
  - United Kingdom Germany
  - Australia Scandinavia
- Secondary with no retained agencies include:
  - Mexico Canada France China India
- Retained International Public Relations representation in:
  - United Kingdom – Black Diamond Agency
  - Germany – Msi Agency
  - Australia – Gate7 Agency (– removed in 24/25 due to budget – Gate7 providing some complimentary coverage)

### **Trade Shows and In-Market Training, Events and Sales**

YMCTB Staff is adding key domestic and international markets trade and media events to the travel schedule.

Attendance was initially kept to trade shows, and travel was reduced when Q4 TBID revenues fell sharply due to the 2024 Yosemite vehicle reservation system. Now, as revenues have

stabilized, the staff is adding events that will drive demand. Australia as an example has not been visited in more than 5 years. As the historic number 2 inbound market, Australia is finally making a post-Covid comeback, necessitating an in-person sales mission tied to Brand USA and VUSA Australia. Due to increased travel, all salaried staff regardless of the primary role will work at these events to spread travel and sales duties and increase productivity and experience.

IPW will continue to be our largest investment of time and funds in promoting international visitation, keeping existing relationships strong, and creating new relationships in emerging markets. IPW will be in Chicago in 2025. Due to an East Coast orientation, YMCTB will slightly reduce our appointment books from three to two books, or 80 appointments vs 120 appointments.

- FAM Trips will continue to be a primary focus for immersion into YMC
- International Trade Sales Travel - will be increased due to a stabilized budget. This work will also increase in-market FAM trips with retained agencies and well-established/legacy travel companies. We expect our FAM budget will be significantly exceeded (overspent) as a result of winning more international business and attention, which is a great outcome. YMCTB has earned a reputation with Visit California as exceeding the expectations of the FAM guests and representing California tourism in the best way possible.

### **Meetings and Incentives, MICE and Conference Industry**

YMCTB has not focused on the meetings industry since COVID. Primary meetings hotels and the park concession made the difficult decision to hold off on returning convention and group sales staff and resources until this industry made a firm return. Now, three years post-COVID, the meetings industry is strong again. This month, YMCTB attended IMEX in support of Happy Goat Farm. While we were primarily supporting Happy Goat answering buyers' questions on Mariposa County lodging options, it was clear through these interactions that YMCTB should be more active in the meetings industry, collecting and soliciting RFPs to be referred to the appropriate properties. Three RFPs were immediately received at IMEX and distributed to best-fit lodging properties worth over \$300,000 in room revenue. YMCTB will consider options for increasing meeting room revenue in the 2025/2026 budget, for paid media advertising, and trade show attendance.



Visit California enters the group meeting market for the first time in over 10 years. Recognizing that both domestic and international meetings and MICE bookings are needed to offset lower international and domestic visitation, Visit California has hired key staff and budget to compete with states for these vital bookings. The meeting and conference business is needed to offset losses for convention businesses avoiding major urban markets such as San Francisco, which lost 80% of the Moscone Center citywide conventions post-COVID. These continued SF booking losses are now due to societal changes, safety concerns, and policy. Rural locations such as Yosemite Mariposa County are perfectly suited to capitalize on small to mid-sized meetings, conferences, and incentive groups.

### **2024 – 2025 International Visitation Forecast – Visit California**

As of September 2024, Visit California's International travel spending and visitation forecast remains unchanged.

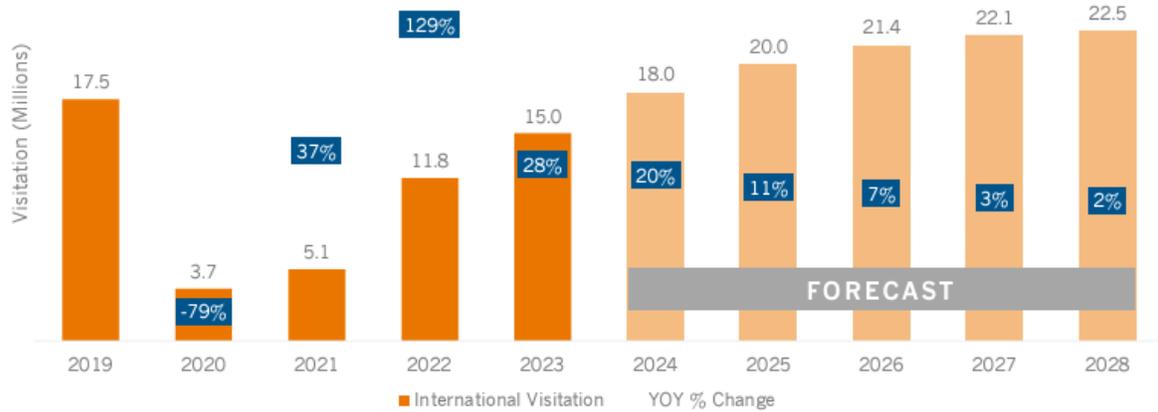
California is forecast to nearly fully recover for visitation in 2024 (99% of 2019 spending), driven by Mexico, Canada, and key overseas markets.

According to the June forecast, international visitor spending in the state will grow by 23% in 2024 and reach \$27.8B.

Although not YMCTB and Mariposa County key markets: North American neighbors Mexico and Canada are forecast to be California's largest spending markets, with visitor spending of \$5B and \$3.9B, respectively.

# California International Visitation Forecast

The chart below shows the current international visitation forecast and annual growth rate.

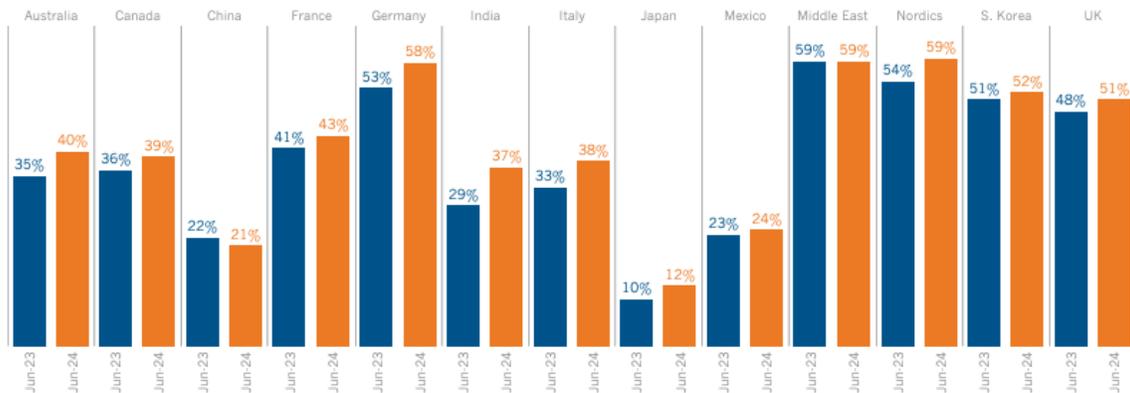


Visitation as shown above is the most important indicator for improvement in Yosemite Mariposa County lodging improvement. Revenue has been a primary focus over pre-pandemic 2019 levels, however with inflation and UDS exchange rates, comparing 2019 to 2024/25 is not apples to apples. With high inflation, 2019 to 2024/2025 spending levels would need to be 21% or higher as a true comparison.

## Markets Travel Planned (International Leisure)

The chart below shows international leisure travel planned in the next 12 months by market.

Planning to Travel in the Next 12 Months: International Leisure Trip (% of pop age 16+)

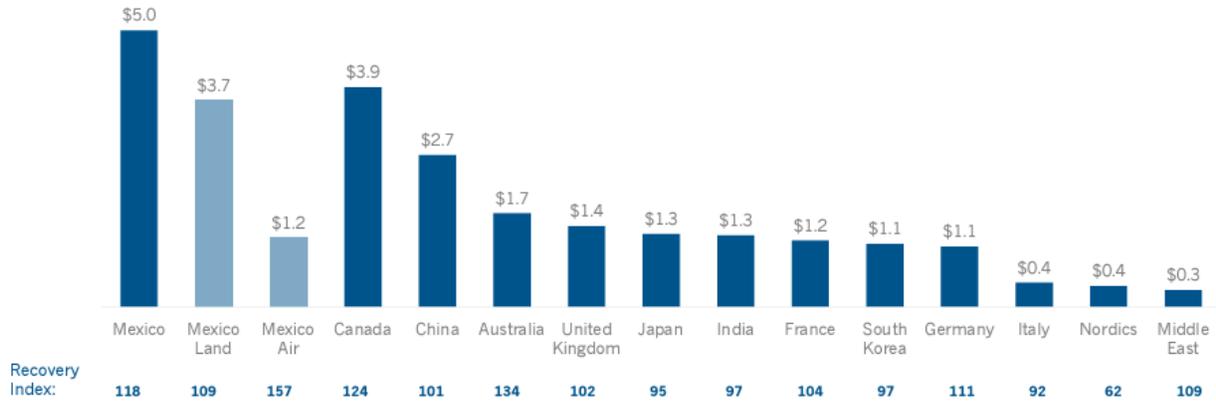


YMCTB and Retained Agency support continues in the UK, Germany, Scandinavia, and Australia. Due to significant Yosemite.com website engagement from Mexico, YMCTB is adding a paid media campaign for Mexico to increase lodging conversions.

## California International Market Spend Forecast

The table below shows the international visitor spend forecast for California and recovery index broken out by international market.

2024 Visitor Spend Forecast by Market (Billions)



## **VUSA Japan “Expo” Trade and Consumer Trade Show – Toyoko – September 2024**

Yukari Fowler as a local resident and travel professional has been a great friend and supporter of Mariposa County and YMCTB. Yukari has, as a volunteer, represented YMCTB in Japan at various trade/consumer shows and several domestic IPW trade shows over the years.

Yukari met with important trade partners such as JTB in Toyoko and provided a list of trade partners to be contacted, facilitated the creation of a new Japanese version of the Mini-Planner sales brochure, and having the brochure printing and distributed in Tokyo, saving significant shipping costs.

Attendance at the show was:

Total - 182,934

Day 1 & 2 (Business Days) - 71,818

Day 3 & 4 (Open to Public) - 111,116