March 20th, 2025 YMCTB Executive Director Update



VUSA - Melbourn - February 20th, 2025

Welcome to Kim Lawson, YMCTBs new Director of Communications and Content!

Board members received Kim's bio in a prior email. Thank you to the HR Committee for your support with the interview and hiring process.

Yosemite NP and Federal layoffs:

Discussion of the impacts on visitation and reservations, both short and long term, for Yosemite National Park due to the mostly opinion-based mass media stories covering the staff layoffs and reductions.

Jonathan has conducted more than a dozen or more interviews with talking points and focus on.

- Sharing concern for any federal workers who were laid off, lost a position or felt forced into resignation. YMCTB is concerned for their well-being and the impacts on them and their families.
- Overall, the 35 or so impacted employees represent less than 2% of the peak season YNP workforce, so in the YMCTB professional position, visitors to YNP will not be directly impacted. The following statements support this position.
- Concession staffing covers much of the guest services in Yosemite, with no impact on federal decisions. Lodging, retail, restaurants, cafeterias, grocery stores, the free shuttle system, tram tours, rentals, and activities including bike rentals, family rafting, mountaineering school. The concession also services all the restrooms and trash removal in areas where these services are offered.
- Seasonal YNP workforce is key. Filling approximately 300 seasonal YNP staffing positions is key to reducing congestion and enhancing the visitor experience in peak season. Providing and offering "basic" workforce housing, offering competitive wages based on

- housing and the length of the seasonal position, streamlining the application process, and increasing outbound recruitment efforts.
- Sustainable visitation: we will continue to educate visitors that they can reduce the impacts of their visit by following the Nature Rules https://www.yosemite.com/plan-your-trip/travel-responsibly/ principles, planning their visit in advance, having a plan that reduces unnecessary road time, and pollution, and traffic, arriving early for sunrise or late for sunset, that an off-peak time of day arrival as well as season visited is critical, avoiding areas know for congestion between 10 am and 2 pm makes a difference, using public transportation YARTS, renting a bike, using smaller parking areas throughout the park disperses congestion and delays.
- Implementing the vehicle reservation system at this late date would be more detrimental than beneficial. More than 50% of peak-season hotel reservations have been made. Most hotels don't have customer or guest contact information to inform them if a reservation system is to be implemented, as these reservations often come from third-party sources, such as online travel agencies (OTAs) and travel companies, which don't share client email addresses or phone numbers. Adding a reservation system this late in the season could result in catastrophic wait times at the entrance stations, as vehicles without reservations could increase from prior years' 700 to over 2,000 per day. These interactions would create miles-long traffic delays.

Budget:

Our revenues are forecasted to remain somewhat flat in 2025/2026, despite the likelihood of no temporary vehicle reservation system. We plan to increase staffing after 6 years and add more daily support through contracted experts. We have more competition with adjacent DMOs and destinations here in California. To keep pace and participate in regional, state, and national programs, we must adjust tasks and roles to be more strategic with our existing directors and delegate repetitive and fixed administrative, sales, and marketing tasks.

<u>Budget – Marketing Plan – HR & Administrative:</u>

See the budget and HR planning memos and timelines.

Yosemite Resorts Hospitality Reception: May 7th. The Marketing Committee and YMCTB Town Hall meeting may be combined. YMCTB plans to hold four town hall meetings in May. North County. El Portal, Mariposa and Wawona/Fish Camp.

Tourism Exchange Update. I was a panel speaker at the Visit California Outlook Forum. It was well attended and a great program for existing and possibly new start-up tourism businesses in Mariposa County.

March 2025 Marketing Report

KPIs: (data from Noble Studios)

Our KPIs all continue to be up Year Over Year (YOY), showing good overall performance. Partner referrals are still trailing behind our TYD goal of 66%. We attribute this to an annual slowdown in

partner referrals during winter months as well as other factors, such as increases in cost-per-click (CPC) for paid search.

Our work for the remaining four months is to increase partner referrals by optimizing the campaigns that are providing the highest return on investment (ROI) as well as hone our messaging to make sure that we are driving as many referrals as possible.



Primary KPIs - Organic and International Sessions

Our organic sessions are both exceeding goal at 68.3% and are 17.1% higher than last year. Paid sessions are also significantly up over 60% YOY though lagging behind at 46.8% to goal.





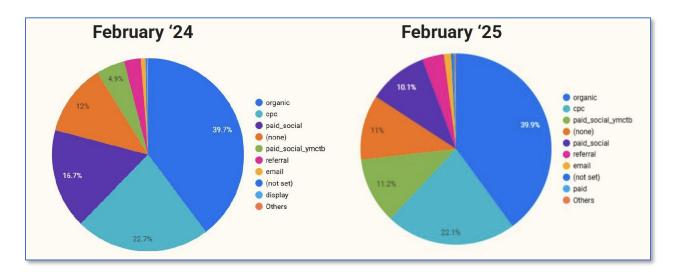
Tracking: Non-Lodging Partner Referrals

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



Channel Breakdown

Our largest source of website traffic continues to be organic, contributing nearly 40% of the total traffic. Google Paid Search (CPC) follows with 22% and paid social traffic (both Noble and YMCTB managed) accounts for 21%. The nearly equal proportions for organic and paid channels demonstrate a healthy balance for sources of website traffic.

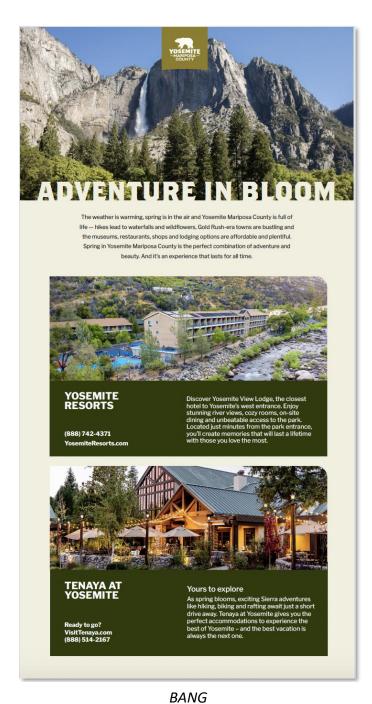


Note that "None" means analytics can't determine an entrance source for a particular user.

We are also seeing our international market sessions YOY for the UK, Australia, Germany and Scandinavia increase 26.3% YOY.

Traditional Print

While our budget for print placements is significantly smaller this year, we continue to take advantage of opportunities presented to us for remnant placements requiring quick turnarounds. The following includes a remnant ad for the USA Today's Travel Guide and a native advertisement for The Guardian in the UK.





The Guardian



DANG

Co-Ops

Overall participation in co-ops continues to be high. As mentioned above, many of our offerings are now focused on digital offerings. Here are three examples of digital advertising that have been done as co-ops.



A portion of the native advertising on SFGate.com



Dedicated emails to Sactown subscribers and Sunset subscribers



Search Engine Marketing (SEM):

As mentioned above, our paid search marketing is responsible for 22.1% of website sessions in February 2025. The costs for SEM have skyrocketed, however. The situation is partly due to the increased competition for deal-related (special offer) keywords. The overall cost per click increased by 18.06% with some spikes of more than 100%. Our cost per conversion also jumped 47.55%, meaning that we are paying significantly more for fewer results.

To combat the rising costs for clicks and conversions, Noble Studios will be testing Google's Remarketing Lists for Search Ads (RLSA) to reach a high-intent audience and improve our conversions. Furthermore, Noble staff will be refining keywords and bidding strategies to prioritize those terms that are most cost-effective and test some automated bidding options.

Digital Paid Media:

The impact of digital paid media is a more positive story. We are seeing strong YOY metrics for paid media in February, where we saw a total of 29,272 lodging referrals, a 20% increase YOY.

US Display, Demand Gen & PMAX

We've continued to see positive growth from our domestic CTR increased 613% across all audiences with click through rates of 4.83% (benchmark 0.47%). Costs per click dropped 58%.

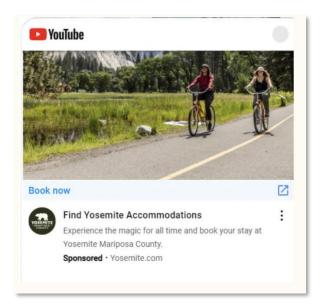
Display example:



Demand Gen example:



PMAX example:



International Display

Our international display and Discovery campaigns continue to do well especially with the audience in Germany. The goal for international display is to stay top of mind rather than driving conversions / referrals since most travel from the UK, Germany and Australia is still booked through a travel agent. Our impressions for the month was 1.8 million or \$2.67 per thousand.

<u>YouTube</u>

Our view rates on YouTube continue to increase with In-Stream up 25%, In-Feed up 3,000% and Shorts up 272% YOY. We continue to test what works best for our audiences, doing A/B testing to confirm which versions work best for each audience.

Our spring ad is currently being shared with more than 60,000 views in one month.



Paid Social

Our spring campaign is performing quite well – with a 2.24% CTR (benchmark is 0.90%). Our Remarketing and History/Culture audiences are the top performers with Facebook users leading over Instagram users.

We'll continue to prioritize the History/Culture audience to make sure that our social media ads continue to exhibit strong performance. We'll also focus on Facebook Reels as that has been the top-performing platform and placement.





eCRM/Email

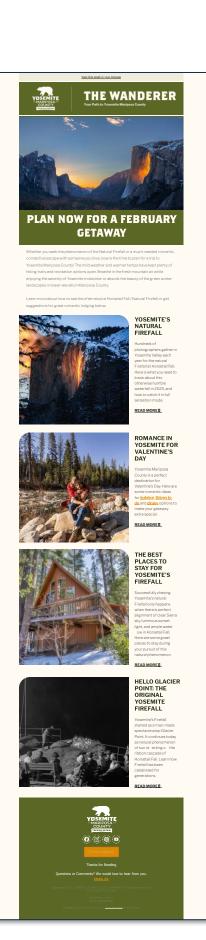
As of February 28, we have added nearly 9,700 subscribers to our consumer email list. We are 81% to our annual goal of 12,000 new subscribers. We are now running our planned Meta lead generation campaign which started March 1.

We continue to send consumer emails twice a month. Our current average open rate for 2025 is 51.4% and our click through rate averages 1.9% of all emails sent and 3.8% of all emails open.

We have been using the new creative branding with our emails since the beginning of 2025. This has added a sense of vitality and integrates perfectly to the design of our website.

At the same time, we are unable to fully implement all creative email templates provided to us by our creative agency due to limitations in email design software and staff time.

We recognize that email is one of our most effective channels and our email list is one of our most valuable assets. We need to do more to increase our success. We hope to engage an email marketing expert who can take our efforts to the next level, whether it is providing HTML coding expertise to provide more attractive email design, performing more specific targeting of our consumers, or just ensuring that the right message is being sent to the right people at the right time.



DIRECTOR OF COMMUNICATIONS AND CONTENT

NEW TO THE TEAM!

Kim Lawson, born and raised in Mariposa County, has a deep love for the outdoors and a



passion for storytelling. She earned a B.S. in Business Administration with a Marketing concentration from Sonoma State University. As Creative Director for Visit Yosemite Madera County, she honed her skills in media relations and content strategy to inspire travelers.

Her diverse career spans motorsports, holistic wellness, and travel. She spent over a decade managing media for racing teams while competing in the NHRA. Now, she channels her adventurous spirit into hiking, backpacking, and capturing nature through photography and digital media. Kim is dedicated to responsible tourism and sharing the beauty of her home with the world.

"I'm thrilled to join the YMCTB team and look forward to proudly representing Yosemite Mariposa County."

Overall Sessions

280,087

Kim Lawson

Website

Overall Traffic

Organic sessions for Yosemite.com are ahead of goal at 68.34%.

Overall sessions are pacing behind last year by -8% primarily from organic traffic and cross-network sources.



Search Engine Optimization

SEO is essential for increasing Yosemite.com's visibility and attracting more travelers. We are actively optimizing key pages with strategic updates to align with popular search terms, improve rankings, and drive engagement.

Current pages in progress are:

Winter Wrapped Spring: Yosemite Mariposa's Secret Season Shoulder Season Yosemite Mariposa County Winter Escapes Winter Escapes

Visiting Yosemite Outside Summer

We continue to work with Noble to identify areas that we can improve and further leverage or search result rankings.

Strategic Content Creation

This content was designed to reach growing audiences by aligning with emerging travel trends and leveraging search engine optimization. By incorporating popular search terms for Yosemite Mariposa County, the following stories ensure greater visibility and engagement with interested travelers and improve our ranking in organic search results.

Recently Published Targeted Articles:

• Celebrated Summits: The Mountain Peaks of Yosemite

Designed to incorporate popular Yosemite search terms and attract that audience to Yosemite.com, this story features the highest peaks of Yosemite as well as most sought-after summits.

Yosemite Guide For the Mobility-Challenged Visitors

Yosemite Mariposa County is for everyone for all time. This helpful article guides mobility-challenged visitors to the most accessible locations in Yosemite Mariposa County, making it easier to navigate the sights and enhancing their experience.

• Celebrate Earth Day In Yosemite

With a rise in visitors seeking "voluntourism" opportunities, this article invites guests to help keep Yosemite Mariposa County pristine- not just on Earth Day, but all year round. Encouraging guests to extend their stay and give back creates a rewarding travel experience while fostering a deeper connection with the growing mindful travel audience.

Public Relations

Earned Media Update

Below are a few recent media features showcasing Yosemite Mariposa County.

Sarah Montoya | Bay Area Moms

Sarah Montoya is a content creator focused family-friendly adventure. Sarah and her family share their winter adventure in Yosemite Mariposa County on social media with several stories and post. Take a peek at the link below.

https://www.instagram.com/p/DEfQ5DAJ7Fi/?utm_source=ig_web_copy_link&igsh=MzRIODBi NWFIZA%3D%3D&img_index=9

Run the Atlas | Weekend Travelers Explore Yosemite Mariposa County in Winter

This fun couple explored all over the Yosemite Mariposa County region featuring mini stories from across the county including their favorite eats, places to stay as well as a winter excursion into Yosemite (video linked below).

https://youtu.be/IWOse6r71AA?feature=shared

IMM Efforts

In the interim following Tony's departure, Jonathan attended IMM, where he engaged with both the travel trade and 22 media representatives. During these meetings, he discussed potential stories and FAM tours, highlighting the unique experiences Yosemite Mariposa County has to offer. Jonathan made valuable connections with several promising writers and we are currently to exploring these opportunities further.

Coming Up | Pan European Mission

Kim will be embarking on the Pan European mission, representing Yosemite Mariposa County as she meets with media, journalists, and content creators across the UK, Germany, France, and Copenhagen. Through these engagements, she will showcase the beauty and experiences Yosemite Mariposa County has to offer, strengthening international awareness and fostering valuable media relationships.

YMCTB Social Media:

Website sessions	Jan-Feb	Total	% to Goal
Aggregate session totals	33,580	246,630	113%
Facebook, National	Jan-Feb	Total	% to Goal
Followers	-3,343	149,215	96%
Link Clicks	122,513	438,533	25%
Engagement	241,815	795,634	27%
Facebook, Local	Jan-Feb	Total	% to Goal
Followers	156	3,220	
Instagram	Jan-Feb	Total	% to Goal
Followers	811	104,091	186%
Engagement	133,259	632,262	73%
Profile Actions*	0*	1,054	38%
* Can no longer be tracked.			
YouTube	Jan-Feb	Total	% to Goal
Subscribers	124	3,543	129%
Total Watch Time (hours)	2,127	4,834	82%
, ,	2,121	.,	0270
Average % Viewed (YTD	2,121	,	
` '	2,121	55.2%	+19.37%
Average % Viewed (YTD totals)		55.2%	+19.37%
Average % Viewed (YTD totals) TikTok	Jan-Feb	55.2% Total	+19.37% % to Goal
Average % Viewed (YTD totals) TikTok Followers	Jan-Feb	55.2% Total 20,330	+19.37% % to Goal 25%
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Average % Viewed (YTD totals) TikTok Followers Engagement Pinterest	Jan-Feb 134 1,897 Jan-Feb	Total 20,330 23,329 Total	+19.37% % to Goal 25% 38% % to Goal
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Our social channels remain healthy overall, 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.

The most notable development in this quarter is specifically centered on our YosemiteNation Facebook channel where we've seen a 2.6% drop in Followers. This is the first negative growth on the channel in over 5 years.

When viewing the January 1st to February 28th reporting period in 2-week increments, the loss of momentum notably begins in the 2nd half of January and continues until the 2nd half of February:

Time Period	Followers
Last period (Oct to Dec 2024)	+1,212
Jan 1 to 15, 2025	+219
Jan 16 to 31	+11
Feb 1 to 15	+10
Feb 16 to 28	-3,583
March (so far)	-540

We have also recently seen a big surge in negative comments on the same channel, roughly correlating to the drop in Followers. Most of those comments are centered around domestic and international political issues, with a significant portion of those focused on the media reports of staffing losses in Yosemite National Park.

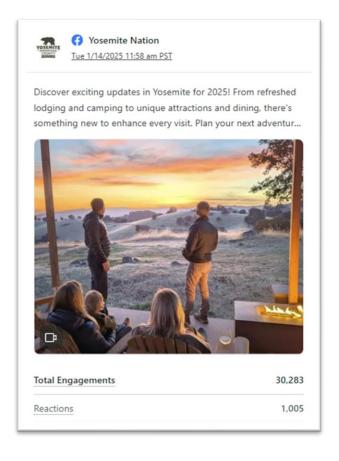
We are carefully monitoring and curating the comments on this channel, providing information to comments and questions made in a constructive manner to educate visitors who have genuine questions. Conversely, we are hiding comments that serve only to undermine our marketing efforts and our destination.

It's important to emphasize that social media is an evolving landscape, requiring constant analysis and adjustments. Even with these new developments on our YosemiteNation Facebook channel, the channel itself remains healthy, with other important metrics not showing a similar drop in results.

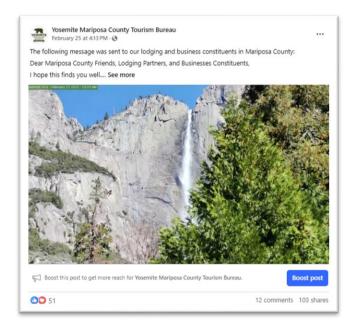
Our overall social efforts remain healthy. Here are some aggregate results from our collective social media efforts for the months of January and February:

All Channels - Jan 1 to Feb 28	Results
Impressions	19,766,557
Engagements	380,448
Post Link Clicks	122,625
Video Views	2,005,730

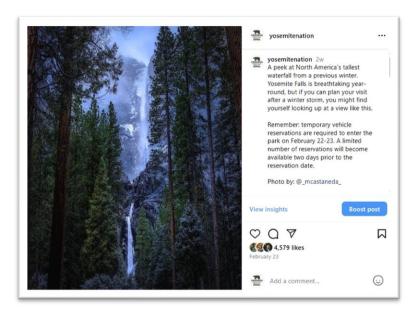
Social Media Examples



This is our top performing Facebook ad – What's new in Yosemite Mariposa County for 2025. 30,283 engagements, 26,436 link clicks.



This is our highest-performing local channel Facebook post. This channel normally sees only a handful of interaction with locals, however this post regarding staffing changes in the NPS saw engagement and interest far above average. 1,490 engagements, 77 comments, and 99 shares.



This is our most popular Instagram post, an inspirational user-created video image of Yosemite Falls in winter. 4,860 engagements.

Video Production

Highlights for the fiscal year to date:

- Videos completed:
 - o Fall, Winter, and Spring video ads
 - o 2025 update to the Firefall Guide video
 - More than 66 vertical videos promoting inside and outside of the park visitation
 - Fall imagery Mariposa Moments video
 - A short "winter night skies" ad for promoting a website article
 - 5 Mariposa County regional videos
 - o The HMA 2024 presentation video
- Videos in active production:
 - 3 Mariposa County regional videos
 - Meeting Spaces promotional video
 - New anthem video
- We posted 61 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 non-seasonal ad video on YouTube with 25,366 views. People collectively watched 888 hours, and it brought us 48 new channel subscribers.



This is our top performing organic video on YouTube. While the weather didn't cooperate this year, there was still a lot of interest in the subject. 26,588 views. 399 total hours of watch time.

Special Offers

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 have been able to maintain over 20 specials offers per month thus far this fiscal year. 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.

<u>International inbound visitation concerns for 2025/2026:</u>

The 2025 international travel forecast is lower than prior years. There is much "optimism"; however, optimism is like hope, it's not a strategy for success. Typically, international traffic accounts for 25% of YMC's annual visitation and 40% of visitation during peak and high shoulder seasons; international visitation is expected to be down 20% to 25% from prior years in California. The primary reason is poor USD exchange rates and our inflation. Politics was listed as about 8th in importance behind costs here in the USA; other world-class destinations are much less expensive. Japan, in particular, is very affordable and sees a significant spike in visitation, as are Asian countries where costs are low and service levels are high. International visitors are also concerned with personal safety here in the USA. **At the same time, 48% of Americans plan to take an international trip within the next 12 months to take advantage of lower costs abroad. **_This will impact domestic trips to the Yosemite region.

US DOLLAR EXCHANG		
Top 10 US Dollar	1.00 USD	Mar 17, 2025 18:59 UTC inv. 1.00 USD
Euro	0.915250	1.092597
British Pound	0.769375	1.299756
Indian Rupee	86.654198	0.011540
Australian Dollar	1.564967	0.638991
Canadian Dollar	1.428244	0.700160
Singapore Dollar	1.329715	0.752041
Swiss Franc	0.880486	1.135737
Malaysian Ringgit	4.442867	0.225080
Japanese Yen	149.189865	0.006703
Chinese Yuan Renminbi	7.233225	0.138251

<u>Increased competition for a reduced volume of tourists:</u>

YMCTB is seeing an increase in investment and staff outbound sales from our adjacent destinations, such as Lake Tahoe, Sequoia/Visalia, Mammoth, Bishop, Monterey, SLO, Sonoma, etc. Also, there is significant competition from the adjacent counties of Tuolumne, Madera, and Mono. The increase in staffing and outbound direct sales, paid sales representation, and marketing is being funded as these counties have seen significant new lodging growth and subsequent BID, TBID, and TOT increases. YMCTB must keep pace with our friendly competitors, who are receiving more funding. During our budget process, we are planning to add staff focused on international and domestic sales, as well as contracted resources, to reduce

redundant tasks for directors and allow time for the strategic implementation of tactics and management of our marketing plan.

Leveraging meetings, conferences, and MICE bookings:

The meetings industry is making a comeback. After years of remote work and tight meeting budgets, companies and associations are expanding their meetings to increase engagement, education, relationship-building, and productivity. YMCTB is engaging with Visit California and Meetings Connections. We created a new short meeting video and updated the property sales sheets. If your business caters to meetings, work with Aaron and me to ensure we have your most current sales information and sales manager/resource contacts to refer leads and RFPs.

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Upcoming FAM Trips

<u>Media</u>

Sarah Montoya	Trip Complete	1/3/2025
Andrea Gemmet	Trip Complete	1/10/2025
Run the Atlas	Trip Complete	1/24/2025
Erika Mailman	FAM in market	3/12/2025
Dan Bernstein	in-planning	4/12/2025
JCB Japan	Communicate with facili	4/24/2025
Spring Black Diamond Media FAM	Communicate with facili	5/1/2025
Alec Sills-Trausch	in-planning	5/20/2025
American Trails	Communicate with facili	6/2/2025
Travel Trade		
Scandi FAM	On Hold	5/1/2025
Hello World - Gate7 - Hannah Scanlon	planning complete	5/6/2025
Megan @ Audley Travel UK	Communicate with facili	7/8/2025
Audley Travel UK	in-planning	7/8/2025
Agnès Brémont	in-planning	9/21/2025
Dawn Murry	Communicate with facili	9/24/2025

Travel Trade, Public Relations (sales), and Meeting Sales:

Winter and Spring are busy sales periods for YMCTB staff, and this year was no exception. Visit California – Dotdash-Meridith Media event 1/21/2025 consisted of editorial meetings over breakfast and a morning meeting rotation with eight editorial groups and teams of DMO and destination industry partners, with editorial staff from Dotdash including Parents, Travel + Leisure, Real Simple, People, Brides, Food & Wine, Premium Publishing. An industry-leading panel followed and focused on the leading trends in acquiring increased editorial coverage and working with influencers and content-creating leaders.



IMM New York took place on 1/23/25

25 scheduled appointments were conducted primarily with travel writers and some content creators. Jennifer Sweeney, our retained Public Relations firm partner, assisted in booking the most valuable and productive meetings. When I made each follow-up email, Jennifer was copied and referenced. Jennifer is making additional follow-up contacts and interaction. This professional relationship is vital, and the results of our combined efforts will lead to stories and editorials on our region, as well as key media FAM trip participation and resulting editorial coverage.





Additional Industry events and conferences:

Australia:

Jonathan attended eight industry events in Sydney, Brisbane, and Melbourne between February 20 and 21, 2025. Brand USA, IMM Sydney, VUSA Sydney, Brisbane; Melbourne; KarryOn Brisbane, Visit California Melbourne, and KarryOn Melbourne.

Throughout the three-city event in Sydney, Brisbane, and Melbourne, I joined 66 exhibiting organizations and representatives, connecting with over 1,700 travel agents—with more than 600 opting in for marketing or follow-up from you. This database is being added to our Trade database.

Sydney - Brisbane - Melbourne









Visit California - Outlook Forum



Tourism Exchange & speaker panel.

YMCTB continues to lead and promote Tourism Exchange, a booking and revenue-generating system focused on increasing sales of lodging and tourism-related services. Tourism Exchange - This effort is financially supported by \$500,00 from Visit California and initiated by Brand USA. The benefits to our community are increased length of visitor stays, visitor repeat visits, and overall spending. The benefits to every local business that joins the program are increased worldwide marketing exposure and new revenue generated from International sources and markets. Most purchases will come from B2B travel trade and travel agency/counselor partners, as well as B2C sales, such as Viator and Google, for tours and activities.

The VC Outlook Forum is always the best source for YMCTB to meet with and learn from the 13 representative countries that our state tourism office contractually and financially retains. This year, some troubling economic news was presented regarding international markets, highlighting areas where YMCTB can work harder to maintain its market share. Additionally, there were excellent programs focused on emerging marketing trends and ways to leverage such as Al.