

VISIT TRUCKEE TAHOE



TWO-YEAR STRATEGIC PLAN FY 23/24 + FY 24/25

Truckee, California | November 2023



LETTER FROM THE CEO & BOARD CHAIR

DEAR PARTNERS,

We are honored to present Visit Truckee-Tahoe's Two Year Strategic Plan FY 23/24-24/25, including the Annual TTBD Report for FY 23/24.

Since forming three years ago in August 2020 (Covid-19), our goal has been to balance destination management with promotion that drives lodging at the right times.

This goal is made possible through partnerships and our support (funding, championing, advocating) that address peak period issues while we also focus on bolstering the low season economy. We're proud of our results, the reputation we've cultivated and the foundation built.

As Truckee's official tourism authority funded by TTBD, it is our responsibility to protect and advocate for a lodging industry that contributes \$179M (71.5%) of Truckee's \$252M tourism spend*, five times more than day visitors on groceries, retail, restaurants, etc. Lodging guests also contributed \$10.6M in TTBD + local city taxes, the 3rd highest tax source for the Town of Truckee.

As foreshadowed in last year's Annual TTBD Report, demand for Truckee lodging is declining. FY 22/23 saw the first downward tick in nine years (excluding FY 19/20) with a gross lodging revenue decline of 1% vs. 43% growth the year prior. In terms of volume, nights spent by lodging guests decreased by 5%. Looking ahead, Hoteliers, STR Property Managers and Independent Hosts are reporting decreasing occupancy and lower rates.

This Two-Year Strategic Plan outlines the focus and structure needed to support a resilient lodging industry that may need to ride out potentially low/no growth year(s) ahead. The Plan presents a three-pronged, Truckee tourism "ecosystem" defined as Brand Promise (marketing and messaging), Brand Support (collaborating) and Brand Experience (managing and protecting). Informed by citizen input, a Truckee Stewardship Council addresses long term, systemic solutions for high-use areas.

We truly look forward to building a more cohesive Truckee lodging industry through informing, listening and advocating for who we serve, the goal being a resounding yes for TTBD renewal. We are also optimistic that this metered, long term approach will withstand the test of economic and political impacts in FY 23/24.

Thank you,

KERRIE RACICOT, CHAIR

COLLEEN DALTON, CEO

*Appendix A The Economic Impact of Travel, Truckee (2022)



BOARD OF DIRECTORS & STAFF

KERRIE RACICOT

Chair
Tahoe Truckee Vacation Properties



DANA MORARU

Vice Chair
Tahoe Signature Properties



DAVE POLIVY

Board Director
Tahoe Mountain Sports & Town of Truckee Council Member



PAUL OESTERMAN

Treasurer
Donner Lake Inn Bed & Breakfast



ROSS MCNAMARA

Secretary
Hampton Inn & Suites Truckee-Tahoe



COLLEEN DALTON

Chief Executive Officer



JACKIE CALVERT

Director of Tourism Marketing & Management



JEN POE

Communications Coordinator



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STRATEGIC FOCUS

While Visit Truckee-Tahoe's ability to anticipate, react, and adjust to negative impacts on lodging (i.e. recession, pandemic) is critical, our long-term strategic focus stays the course.

After consultant-guided discussions over the past two years, our vision, mission and guiding principle now serve as our compass.



VISION

Our ideal future state

Our vision is a thriving community that welcomes all people to enjoy and protect Truckee's mountain environment now and for future generations.



MISSION

Our purpose

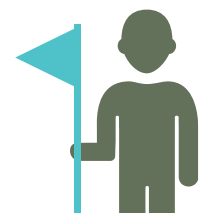
We promote, protect and enhance Truckee as an authentic mountain town.



SUSTAINABLE TOURISM

Our responsibility to the community & the environment

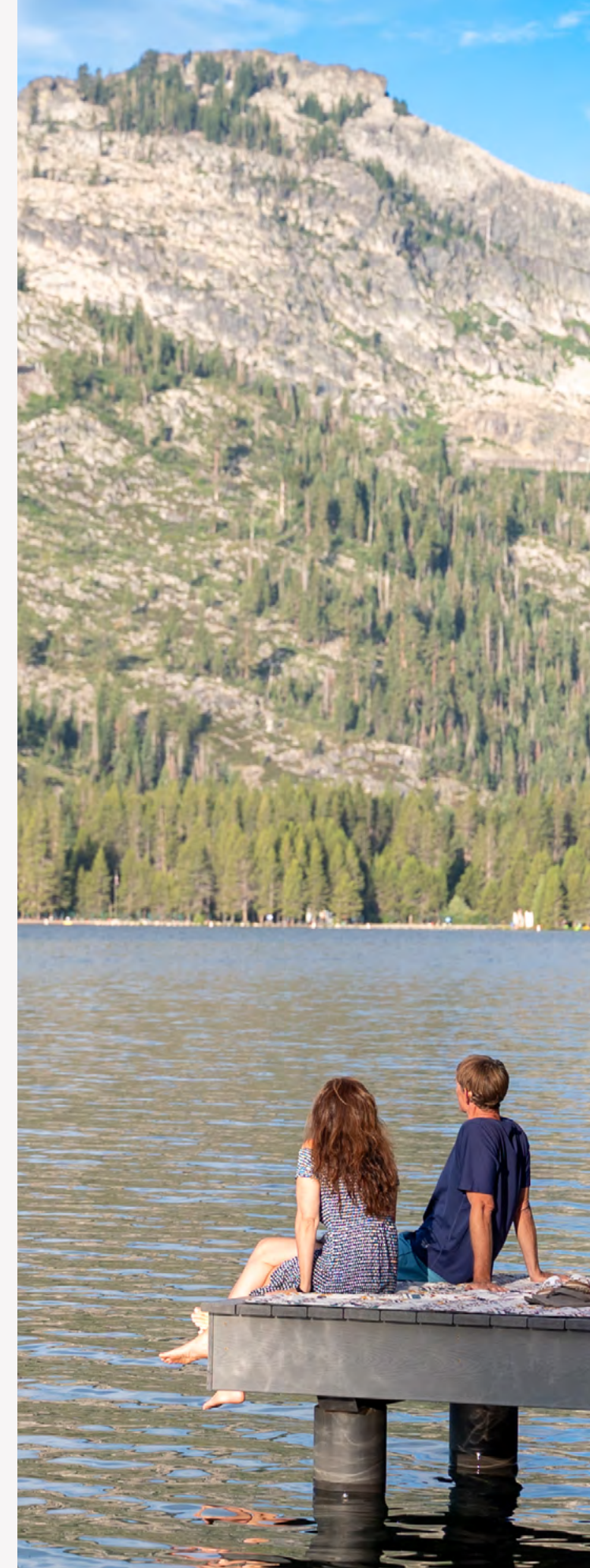
In collaboration with key groups in the Truckee Tourism Ecosystem, our responsibility is to continuously aim for a thriving tourism economy balanced with the well-being of our community and protection of our environment.



GUIDING PRINCIPLE

Who we serve

We serve our lodging business members, partner with key organizations and balance our actions for the well-being of our community.



ORGANIZATION

Since forming in August 2020, Visit Truckee-Tahoe continues to develop as Truckee's first official tourism authority overseeing the 2020-2025 Truckee Tourism Business Improvement District (TTBID).

Out of Truckee's \$252M tourism economy, 71.5% of traveler spending (\$179M) is attributed to overnight lodging guests.*

With lodging as the backbone of Truckee's tourism economy, our organization's highest priority is to ensure steady, responsible growth in overnight visitation through strong governance, operations and fiscal management.

*Appendix A The Economic Impact of Travel, Truckee (2022)

GOVERNANCE/BOARD

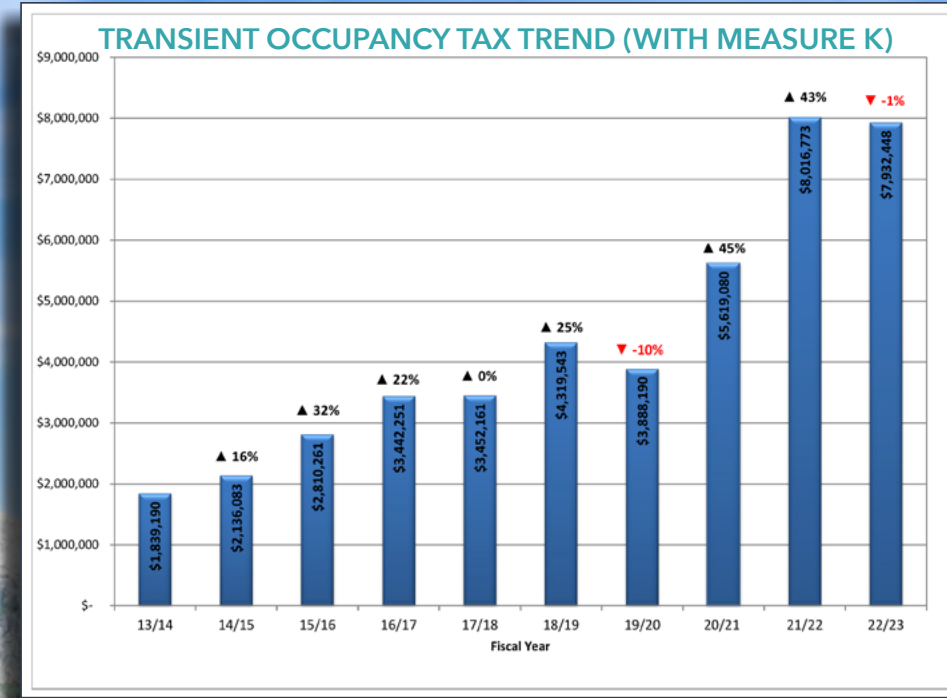
Strategic Imperative: Fulfill the mission with agility, flexibility and innovation.

- GOAL #1:** Strategic, high level oversight of the organization.
- GOAL #2:** Decision making on the Board Action Plan (policies, meeting rules, annual corporate report, etc.)
- GOAL #3:** Annual evaluation of Two Year Strategic Plan, KPIs for lodging, community wellbeing, stewardship and for tourism economic impacts.
- GOAL #4:** Direction and support for Staff and annual evaluation of the CEO.
- GOAL #5:** Accountability for VTT Board Director Role and Responsibilities.
- GOAL #6:** Representation of VTT in the community, to help build organization reputation and value awareness for Truckee's tourism economy.
- GOAL #7:** Relationship development with key VIP partners.

OPERATIONS/STAFF AND CONTRACTORS

Strategic Imperative: A high performance, fulfilled team that delivers successful results on the organization's priorities.

- GOAL #1:** A culture that values teamwork, efficiency, learning, and collaboration with VIP Partners.
- GOAL #2:** Excellence in communications, operations and fiscal management.
- GOAL #3:** A team with the tools, training, and development needed to deliver on priorities.
- GOAL #4:** Support system for staff retention, growth, succession, hiring and/or outsourcing as needed to deliver on priorities.



FINANCE/REVENUE

Strategic Imperative: Truckee annual gross lodging revenue growth % = Consumer Price Index (western US) 12 month look-back +/- 1% as of June 30. Renew TTBID.

- GOAL #1:** Increase Truckee gross lodging revenue without increasing visitors (people and vehicles) in peak periods.
- GOAL #2:** Achieve Truckee Tourism Business Improvement District (TTBID) renewal for 6/30/25 start of the next Management District Plan.
- GOAL #3:** Excellence and transparency in fiscal management.
- GOAL #4:** Exploration of additional income sources for the organization.



TRUCKEE - AN AUTHENTIC MOUNTAIN TOWN

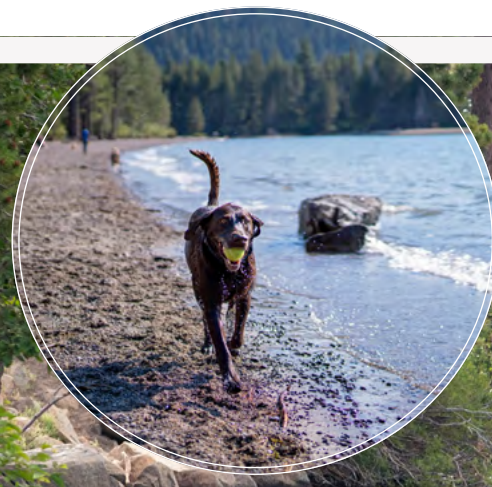
Truckee's brand identity as an authentic, charming mountain town with easy access to world class recreation is perhaps the biggest driver for healthy-minded individuals to live here. These are the same reasons why visitors choose Truckee over other destinations for the day, week, summer or winter.

Truckee's community character also plays a major role in attraction and appeal to visitors. Our personality as a strong, friendly, and close-knit community is the envy of folks who wish they could live here too. We have families and raise our kids to love the outdoors. We meet up with friends to ski/ride, hike, bike and enjoy other adventures. Alongside visitors, we recreate, dine out, go to breweries, shop, get groceries and enjoy wellness and fitness services.

And while visitors drive a strong tourism economy that helps provide all of the amenities that we enjoy, including Town services and infrastructure, we are increasingly challenged by Truckee and Lake Tahoe's popularity. Like other tourism destinations around the world, residents simply wish for balance, understanding, and respect.

While there is no magic formula and every tourism destination is unique, Visit Truckee-Tahoe's Two-Year Strategic Plan builds from a foundation of successful actions and an ecosystem mindset that began in 2020. It has been our mission to promote, protect and enhance Truckee as an authentic mountain town.

Truckee's guests forever remember feeling invited by local residents to share and enjoy what we all treasure about living here. As a tourism organization, we know that the only path forward is together with our community, perhaps our greatest asset of all.





TRUCKEE TOURISM ECOSYSTEM - KEY GROUPS

Across the world, responsible tourism authorities work in partnership with organizations who have the leadership, jurisdiction and authority to manage increased demand for popular destinations.

We believe a coordinated approach, convening key groups is the best path forward to balancing Truckee's tourism economy with usage management, community well-being and environmental protection.

Since forming in 2020, Visit Truckee-Tahoe has taken the lead in building relationships with key groups that make up the Truckee Tourism Ecosystem. Together, we work through the challenges of how to protect and preserve Truckee as an authentic mountain town.

Interdependently, key groups focus on short term mitigation and long term systemic changes needed to address the increased desire for Truckee as a place to live and visit.

KEY GROUPS



Strategic Imperative: A coordinated approach that balances Truckee's tourism economy with community wellbeing and environmental protection.



TRUCKEE LODGING TTBD PAYORS
 Build lodging industry cohesion.
 Convene Hoteliers, Property Managers, & Independents

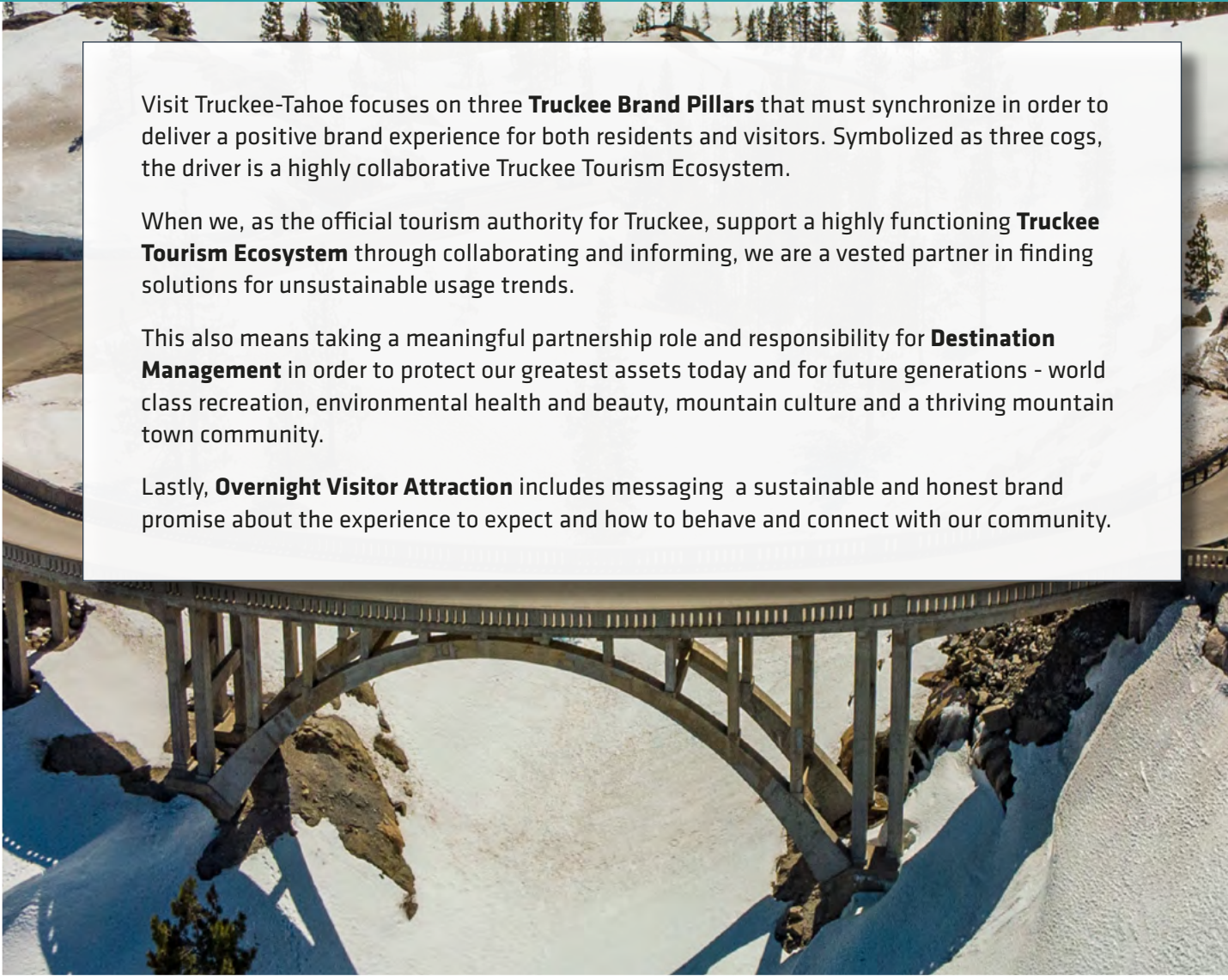
TRUCKEE COMMUNITY
 Inform residents, business owners and boards about VTT's role, responsibilities and results.

CCC - NEVADA COUNTY LEADERSHIP FORUM
 Collaborate on peak period, near-term solutions.
 Government and Operations Leaders.

TRUCKEE STEWARDSHIP COUNCIL
 Convene and collaborate on systemic solutions.
 Accountability for Stewardship Plan.
 Resorts and Large Organization Leaders.



TRUCKEE BRAND PILLARS - PROMISE, SUPPORT, EXPERIENCE



Visit Truckee-Tahoe focuses on three **Truckee Brand Pillars** that must synchronize in order to deliver a positive brand experience for both residents and visitors. Symbolized as three cogs, the driver is a highly collaborative Truckee Tourism Ecosystem.

When we, as the official tourism authority for Truckee, support a highly functioning **Truckee Tourism Ecosystem** through collaborating and informing, we are a vested partner in finding solutions for unsustainable usage trends.

This also means taking a meaningful partnership role and responsibility for **Destination Management** in order to protect our greatest assets today and for future generations - world class recreation, environmental health and beauty, mountain culture and a thriving mountain town community.

Lastly, **Overnight Visitor Attraction** includes messaging a sustainable and honest brand promise about the experience to expect and how to behave and connect with our community.

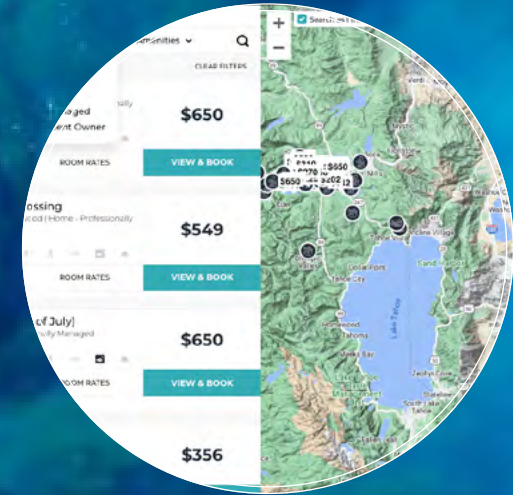


BRAND PROMISE - OVERNIGHT VISITOR ATTRACTION

Driving desire for Truckee versus competing mountain destinations requires a deliberate approach and careful promotion of our unique brand strengths. Thoughtful, targeted, and compelling messaging invites sustainably minded travelers to visit and stay longer during off-peak periods.

Visit Truckee-Tahoe celebrates Truckee's proximity and access to world class recreation, in addition to our authentic mountain culture and historic downtown. In our communications, we permeate messaging with how we live sustainably and how visitors can too.

Equally important, when we promise a unique Truckee vacation experience, we rely upon the expertise and passion of tourism dependent small business owners who offer everything from lodging to locally baked bread and sports gear to enjoy Truckee's outdoor paradise.



PRIORITY #1 - MESSAGING

Promote the unique Truckee experience and proximity to Lake Tahoe, infused with stewardship messaging.

GOAL #1 - FOCUS ON BRAND ATTRIBUTES: Promote functional brand strengths (i.e. proximity, world class recreation) unique travel themes (i.e. events, wellness and cuisine, families) and emotional experiences (i.e. awe in nature, flow in recreation, connection with family and friends).

GOAL #2 - SUPPORT LODGING AND TOURISM BUSINESSES: Encourage creation of unique experiences, activities, events and content that reinforce Truckee's brand attributes. Provide in-market visitor tools (i.e. regional map, video).

GOAL #3 - INNOVATE NEW CAMPAIGNS AND CREATIVE: Create unique campaigns that differentiate Truckee from other towns (character, culture, native history) with an emphasis on visitor dispersion to pre+post peak periods.

GOAL #4 - EDUCATE VISITORS BY INFUSING ALL MESSAGING WITH STEWARDSHIP PRINCIPLES: Infuse all Truckee brand messaging with stewardship principles. Enroll and engage Truckee VIP Partners and local tourism businesses to do the same.

PRIORITY #2 - MARKETING

Identify and attract ideal overnight visitor audiences for midweek and pre+post "peak visitation".

GOAL #1 - DRIVE LODGING LEADS to TOURISM WEBSITE: In addition to paid advertising and SEO, develop incentives for inbound link referrals (FIT (individuals) and groups/corporate travelers) to VisitTruckeeTahoe.com.

GOAL #2 - REFER LODGING BOOKINGS to PAYORS: Refer lodging leads (clicks) outbound or deliver full service e-commerce transactions to Truckee lodging providers.

GOAL #3 - SUPPORT AND TARGET DIRECT FLIGHTS: Target RNO direct flights and support Reno Airport Services Corporation (RASC).

GOAL #4 - TARGET HIGHER YIELD, LONGER STAYS, SUSTAINABILITY MINDED MARKETS: Target higher-yield, longer stay, sustainably minded vacationers (demographics and psychographics).

GOAL #5 - MAXIMIZE PAID ADS & SOCIAL MEDIA ROI: Ensure satisfactory return on costs and staff time.



BRAND SUPPORT - TRUCKEE TOURISM ECOSYSTEM

We define the Truckee Tourism Ecosystem as everything within the Truckee Watershed: wildlife, land, water, air, individual people, groups, entities and organizations. As Herman Fillmore (Wá-šiw) Culture/Language Resources Director for the Washoe Tribe of NV and CA explained at the Nevada County Sustainability Summit 2023, it is time to view natural features, i.e. Lake Tahoe, with “personhood”. With this lens, we see how human interaction with nature is “personal”. And, how much the Truckee Tourism ecosystem is highly interdependent. Working together, we can ensure long-term health and sustainability for the Truckee Watershed.

As the tourism authority, Visit Truckee-Tahoe prioritizes collaborating with and informing key groups who are critical to protecting and enhancing Truckee as an authentic mountain town now and for future generations.

Defined as “Brand Support,” this collaborative work ensures Truckee remains an authentic mountain town - for everyone.



PRIORITY #3 - COLLABORATING

Partner with top leaders for a coordinated approach to long term, systemic solutions and consistent brand messaging.

GOAL #1 - LEAD TRUCKEE STEWARDSHIP COUNCIL: Convene top leaders 2X/year to report progress on priorities per the Stewardship Plan and to address emerging issues.

GOAL #2 - COLLABORATE w/ CCC - LEADERSHIP FORUM: Provide VTT presentations and updates for meetings.

GOAL #3 - SERVE on TAHOE STEWARDSHIP COUNCIL: Ensure Truckee’s representation and influence on the Lake Tahoe Stewardship Council as it interconnects with the Truckee Stewardship Council and Plan.

GOAL #4 - ADVOCATE for TRUCKEE TOURISM INDUSTRY: Represent and advocate for Truckee at Visit California, California Travel Association, Destination Marketing West and other related associations (i.e. Recreate Responsibly).

PRIORITY #4 - INFORMING

Inform Key Groups about Visit Truckee-Tahoe’s role, responsibility, actions and results for balancing Truckee’s tourism economy with community wellbeing and protection for the environment.

GOAL #1 - RESEARCH, METRICS, ECONOMIC REPORTING: Track KPIs for visitor satisfaction, lodging, tourism economy, and community sentiment.

GOAL #2 - EDUCATE & INFORM TRUCKEE COMMUNITY: Continuously inform TTBD lodging payors, VIP partners, citizens and Boards about (1) the importance and benefits of tourism, (2) VTT’s actions, investments and results (3) Truckee Stewardship Plan progress.



BRAND EXPERIENCE - DESTINATION MANAGEMENT

Truckee's tourism economy depends on destination management, also known as "Brand Experience". This entails everything from events and activities, to a wide variety of options for restaurants and retail, effective signage, enough parking spaces, access for everyone, cleanliness, safety and security.

A great place to visit is also a great place to live. Visit Truckee-Tahoe has spent significant time and funding since our first three years of existence on programs, services and infrastructure that manage and protect Truckee.

From funding TART Connect, to creating Sustainable Truckee Eco/Green Lodging Standards and educating visitors about reducing single-use consumption, Visit Truckee-Tahoe considers this brand pillar paramount to our future existence. If we don't protect it, they will not come.

We believe that returning guests are more likely to respect and take care of our town, our community and our lands. When an overnight stay is so memorable and positive that guests plan to come again and stay longer (while also telling their friends and family to visit) we all win a very special and unique kind of loyalty to Truckee. We become their home away from home.



PRIORITY #5 - MANAGING

Support destination management and enhancements that improve the experience for all.

GOAL #1 - SUPPORT MOBILITY & CAR-FREE VISITATION: Support efforts that reduce private car use.

GOAL #2 - SUPPORT CAPITAL INVESTMENTS LIKELY TO INCREASE LODGING: Support new or capital improvements most likely to attract overnight visitation without negatively impacting community wellness or the environment.

GOAL #3 - SUPPORT EVENTS & PEAK VISITATION MESSAGING: Sponsor and/or support major events happening midweek or pre+post "peak visitation." Collaborate with Key Groups and Truckee business owners for consistent peak visitation messaging to ensure education, stewardship and safety.

GOAL #4 - PROMOTE RESPONSIBLE VISITOR BEHAVIOR AND SAFETY: Collaborating with Key Groups and Truckee business owners, publish and distribute (pre-arrival, in market) Visitor Education Guides that drive safe, responsible, sustainable behavior (i.e. Guide to Truckee-Tahoe Boating & Cold Water Safety).



PRIORITY #6 - PROTECTING

Support destination protection & stewardship planning.

GOAL #1 - SUPPORT IMPROVEMENTS TO PEAK IMPACTS: Support systemic improvements (programs, services, infrastructure) to peak period issues in popular areas.

GOAL #2 - COMPLETE & TRACK STEWARDSHIP PLAN: Complete the "Truckee Stewardship Plan" based on Global Sustainable Tourism Council (GSTC) standards and informed by the Truckee Stewardship Council, CCC, Citizens, TBID Payors and VTT Board.

GOAL #3 - ENCOURAGE LODGING SECTOR TO "GO GREEN": Launch and promote Sustainable Truckee, "lean-in" eco/green standard for Short-Term Rentals (STR).



FOCUS

VISION

Our vision is a thriving community that welcomes all people to enjoy and protect Truckee's mountain environment now and for future generations.

MISSION

We promote, protect and enhance Truckee as an authentic mountain town.

GUIDING PRINCIPLE

We serve our lodging business members, partner with key organizations and balance our actions for the well-being of our community.

ORGANIZATION

GOVERNANCE/BOARD

Strategic Imperative: Fulfill the mission with agility, flexibility and innovation.

OPERATIONS/STAFF + CONTRACTORS

Strategic Imperative: A high performance, fulfilled team that delivers successful results on the organization's priorities.

FINANCE/REVENUE

Strategic Imperative: Truckee annual gross lodging revenue growth % = Consumer Price Index (western US) 12 month lookback +/- 1% as of June 30. Renew TTBID.

BRAND PROMISE - OVERNIGHT VISITOR ATTRACTION

PRIORITY #1 - MESSAGING Promote the unique Truckee experience and proximity to Lake Tahoe, infused with stewardship messaging.

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GOAL #4 - EDUCATE VISITORS BY INFUSING ALL MESSAGING WITH STEWARDSHIP PRINCIPLES: Infuse all Truckee brand messaging with stewardship principles. Enroll and engage Truckee VIP Partners and local tourism businesses to do the same.

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GOAL #5 - MAXIMIZE PAID ADS & SOCIAL MEDIA ROI: Ensure satisfactory return on costs and staff time.

BRAND SUPPORT - TRUCKEE TOURISM ECOSYSTEM

PRIORITY #3 - COLLABORATING Partner with top leaders for a coordinated approach to long term, systemic solutions and consistent brand messaging.

GOAL #1 - LEAD TRUCKEE STEWARDSHIP COUNCIL: Convene top leaders 2X/year to report progress on priorities per the Stewardship Plan and to address emerging issues.

GOAL #2 - COLLABORATE W/ CCC - LEADERSHIP FORUM: Provide VTT presentations and updates for meetings.

GOAL #3 - SERVE ON TAHOE STEWARDSHIP COUNCIL: Ensure Truckee's representation and influence on the Lake Tahoe Stewardship Council as it interconnects with the Truckee Stewardship Council and Plan.

GOAL #4 - ADVOCATE FOR TRUCKEE TOURISM INDUSTRY: Represent and advocate for Truckee at Visit California, California Travel Association, Destination Marketing West and other related associations (i.e. Recreate Responsibly).

PRIORITY #4 - INFORMING Inform Key Groups about Visit Truckee-Tahoe's role, responsibility, actions and results for balancing Truckee's tourism economy with community wellbeing and protection for the environment.

GOAL #1 - RESEARCH, METRICS, ECONOMIC REPORTING: Track KPIs for visitor satisfaction, lodging, tourism economy, and community sentiment.

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TRUCKEE TOURISM ECOSYSTEM - KEY GROUPS

Strategic Imperative: A coordinated approach that balances Truckee's tourism economy with community wellbeing and environmental protection.

**TRUCKEE LODGING
TTBID PAYORS**

Build lodging industry cohesion. Convene Hoteliers, Property Managers, & Independents

**TRUCKEE
COMMUNITY**

Inform residents, business owners and boards about VTT's role, responsibilities, and results.

**CCC NEVADA COUNTY
LEADERSHIP FORUM**

Collaborate on peak period, near-term solutions. Government & Operations Leaders.

**TRUCKEE STEWARDSHIP
COUNCIL**

Convene and collaborate on systemic solutions. Accountability for Stewardship Plan. Resorts & Large Organization Leaders.

TRUCKEE BRAND PILLARS

**BRAND PROMISE
OVERNIGHT VISITOR
ATTRACTION**

PRIORITY #1 - MESSAGING

Promote the unique Truckee experience and proximity to Lake Tahoe infused with stewardship messaging.

PRIORITY #2 - MARKETING

Identify and attract ideal overnight visitor audiences for midweek and shoulder season travel.

**BRAND SUPPORT
TRUCKEE TOURISM
ECOSYSTEM**

PRIORITY #3 - COLLABORATING

Partner with top leaders for a coordinated approach to short and long term systemic solutions to peak period impacts.

PRIORITY #4 - INFORMING

Inform Key Groups about Visit Truckee-Tahoe's role, responsibility, actions and results for balancing Truckee's tourism economy with community wellbeing and protection for the environment.

**BRAND EXPERIENCE
DESTINATION
MANAGEMENT**

PRIORITY #5 - MANAGING

Support destination management and enhancements that improve the experience for all.

PRIORITY #6 - PROTECTING

Support destination protection and stewardship planning

**SUPPORT may include advocate/ lobby, fund, allocate Staff time (i.e. convening, coordinating).*

BRAND EXPERIENCE - DESTINATION MANAGEMENT

PRIORITY #5 - MANAGING: Support destination management and enhancements that improve the experience for all.

GOAL #1 - SUPPORT MOBILITY & CAR-FREE VISITATION: Support efforts that reduce private car use.

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GOAL #3 - ENCOURAGE LODGING SECTOR TO "GO GREEN": Launch and promote Sustainable Truckee, "lean-in" eco/green standard for Short-Term Rentals (STR).

TRUCKEE STEWARDSHIP PLAN

AN ECOSYSTEM MINDSET

Since forming as Truckee's first official tourism authority in 2020, VTT continues to take action and make investments that protect and enhance Truckee - prioritizing progress over perfection, process over a fixed plan and partnerships vs. siloed action.

With an ecosystem mindset and a strategic plan that relies upon collaboration and long term thinking, the goal is to retain Truckee's mountain town character and appeal to both residents and visitors today, and for generations to come.

TRUCKEE TOURISM ECONOMY - PROTECTION, RESILIENCE, RESPONSIBILITY

Desire for a destination takes thoughtful positioning of brand strengths to ensure resilience during hard times and to compete with similar destinations regionally and nationally. Retaining uniqueness and avoiding a homogeneous reputation or being perceived as a traffic-congested town requires all of us to work together, from government and ski area leadership to district employees and small business owners.

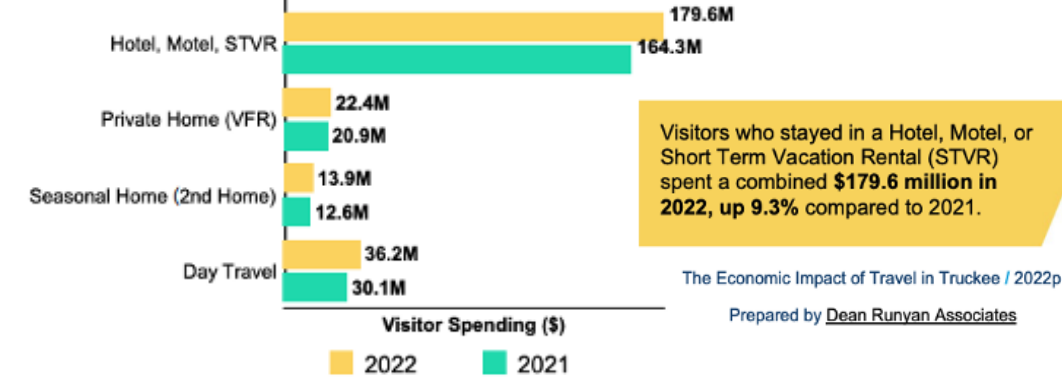
In the recent Economic Impact of Travel in Truckee report (Appendix A), the contribution of non-resident spending was \$252M in 2022, with 71.5% or \$179M of that spending provided by overnight lodging guests who stayed in a hotel or short term rental.

On average in 2022, a single overnight guest spent nearly \$300 per day in Truckee, between retail, restaurants, groceries, lodging and more. According to the report, lodging guests spend five times more than day visitors. The value of overnight guests who support local small businesses and contribute to Town of Truckee's revenue (Transient Occupancy Tax, TOT) as the 3rd highest tax source, is significant.

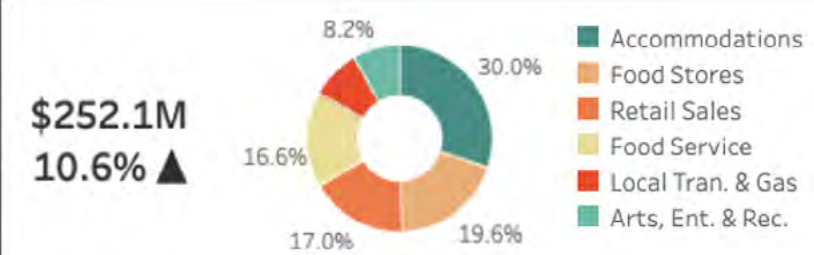
When TOT contributes to the Town of Truckee's general fund, Truckee's lodging industry helps pay for town improvements that address traffic and congestion from roundabouts to TART Connect and the new transportation mobility hub. Since FY 15/16, TOT has contributed \$39,480,707 to the general fund, and to Measure K (housing, open space, wildfire mitigation) starting January 2021. Ensuring Truckee's lodging industry is resilient to market shocks, catastrophes, severe weather or the slow decline of market share (loss of visitors to other destinations vs. Truckee) is paramount to protecting Truckee from economic decline reminiscent of 2008.

To that end, paying attention to lodging trends is critical to sustainability and stewardship as lodging guests contribute so much funding to our community, yet make up only 58% of all visitors who spend the night. Per the Economic Impact report, paid lodging nights declined by 5% in 2022 from 634K to 602K, a sign of decreasing demand. Per Town of Truckee's TOT Trends Graph (Pg. 6), TOT declined by 1%, a stark contrast to the 43% growth rate between fiscal years prior. There is no guarantee that demand for Truckee stays constant. We are impacted by inflation, an "overcrowded, trashed Tahoe" national media message, and seasonal volatility due to weather or other impacts (i.e. pandemic). Our role as Truckee's tourism authority is to plan for swings with prudent reserves, watch and adjust to lodging trends, anticipate and/or react swiftly to negative conditions in order to ensure Truckee's lodging industry is protected, resilient and responsible.

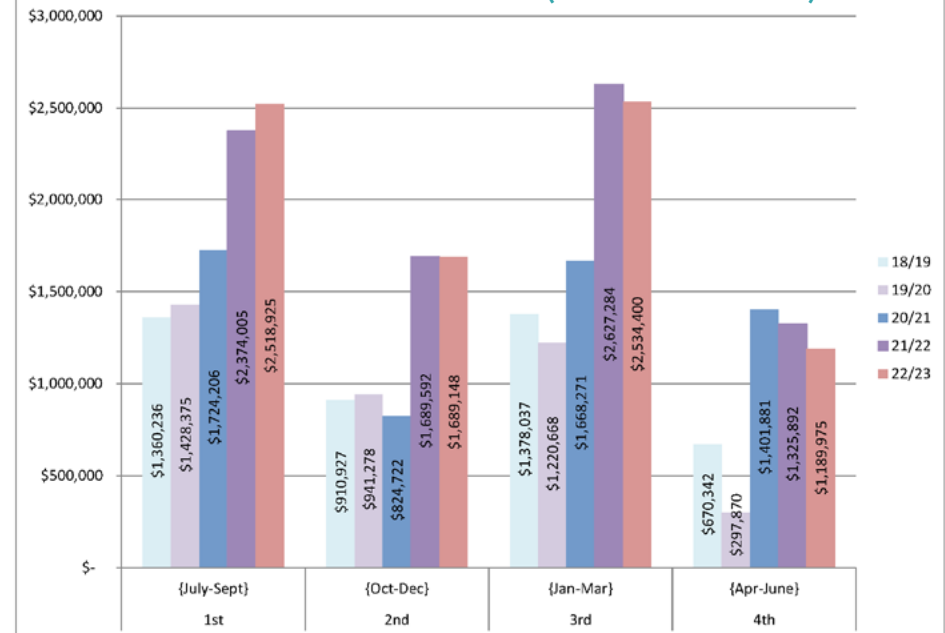
Visitor Spending by Accommodation Type



Sources: Dean Runyan Associates, Omnitrak Group, STR, AirDNA, Census Bureau



TOT REVENUE BY QUARTER (WITH MEASURE K)



TRUCKEE STEWARDSHIP PLAN

TRUCKEE STEWARDSHIP COUNCIL & SPHERE OF IMPACT (MAP)

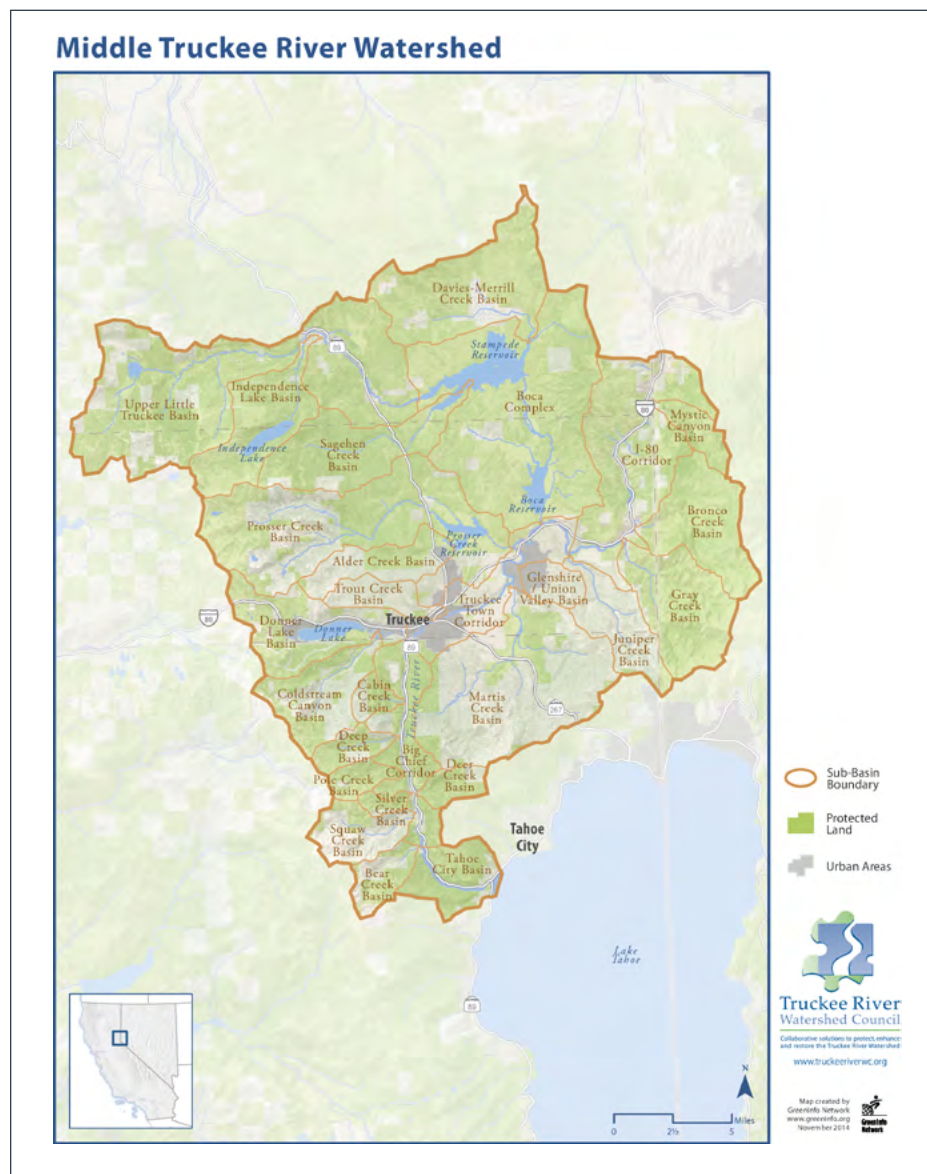
Between 2020-2023, Visit Truckee-Tahoe forged dozens of VIP Partnerships (Pg. 33) in response to Covid-19 peak period impacts, most importantly with leaders who participate in Nevada County Supervisor Hardy Bullock's CCC meetings. This engaged monthly group of 45+ leaders has been mitigating near-term, peak period impacts for three years with Visit Truckee-Tahoe a meaningful contributor to agenda development and solutions within our purview.

That being said, the need for governance and structure of a group committed to developing long-term, systemic solutions for management of high-use areas, traffic control and parking drove formation of the Truckee Stewardship Council (the Council) in May 2023 (Appendix B). Visit Truckee-Tahoe administers, convenes and facilitates the Council, comprised of leaders who have the authority, jurisdiction and most importantly, the backing of their organizations to prioritize solutions.

One of the first orders of business for the Council's meeting in April 2023 was to agree on the criteria, then define the geographical boundary of the Truckee Stewardship Plan as the Truckee Watershed including Palisades Tahoe (Alpine and Olympic Valleys) and Northstar California, east to Nevada state line, north to the Truckee Ranger District boundary and west to Donner Summit.

TRUCKEE STEWARDSHIP PLAN - SPHERE OF IMPACT (MAP) CRITERIA

1. Reflects geographical region where we identify as a community.
2. Reflects key recreation experiences, natural features, assets/attractions that are perceived as important to the quality of experience for everyone (visitors and residents).
3. Ensures leadership with authority/jurisdiction to manage and make changes in key impact areas are either at the table (Advisory Council) or represented in governance/structure of the Truckee Stewardship Plan.
4. Encompasses programs, master plans and initiatives that are or will address issues that are impacting quality of experience.



COMMUNITY DRIVEN, PLACE BASED TRUCKEE STEWARDSHIP

The second order of business for the Council was to invite those who self-identify as "Truckee locals" to provide quantitative and qualitative feedback on what areas and issues are most negatively impacting quality of life. The Council determined this map included Northstar California residents, yet excluded Olympic and Alpine Valleys, and Donner Summit. That being said, the first survey was sent to anyone opted in to the Truckee Flashvote member panel for Truckee, whether they were a resident, 2nd homeowner, incoming commuter or from elsewhere.

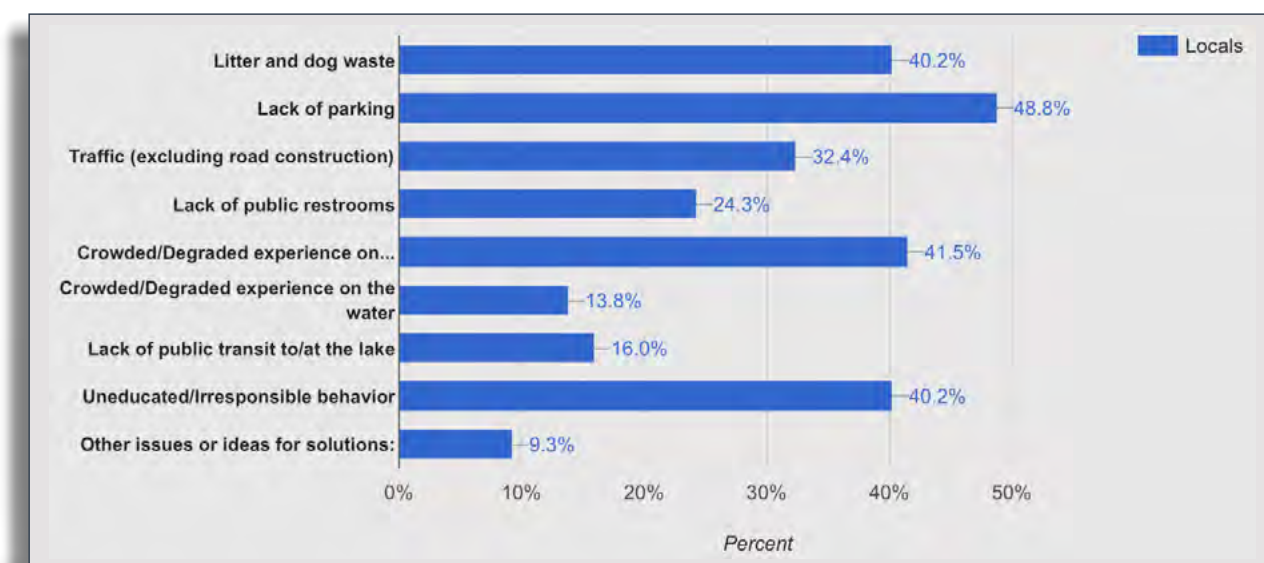
Between June and August, the Council issued two Flashvote Surveys for statistically relevant feedback (+/- 3% margin of error with an average of 930 respondents per survey) which revealed the top four areas and issues of concern, by location.

TOP THEMES IMPACTING QUALITY OF LIFE - TRAFFIC, CROWDED EXPERIENCES, PARKING, TRASH, BEHAVIOR

Donner Lake proved to be the highest area of concern at 2X greater than the runner up, the Truckee River.

Impact Area	Top Concerns
1. Donner Lake	lack of parking, crowded/degraded, litter/waste, behavior
2. Truckee River	overuse/degraded, lack of access, parking, restrooms
3. Scenic Paved Paths	lack of etiquette/education, speed of cyclists, trash/waste
4. Historic Downtown	traffic, lack of parking, restrooms, no special "Locals" offers

DONNER LAKE GREATEST AREA OF CONCERN



This citizen driven, place-based approach helps multiple entities, from federal to local government, non profits, districts, agencies and associations prioritize stewardship work given their oversight. In all impact areas, multiple entities are needed to work together. Far more than one have the jurisdiction, authority, and funding for long-term, high-use solutions to specific areas of concern. Thus, the need for intensive collaboration and long-term planning. Reporting back to the Truckee Stewardship Council with progress updates, by area, is planned on a bi-annual basis to then be followed with an update to the community.

Flashvote Survey Sources: <https://www.flashvote.com/truckee-tahoe-ca/surveys/tourism-06-23>
<https://www.flashvote.com/truckee-tahoe-ca/surveys/summer-area-usage-08-23>

TRUCKEE STEWARDSHIP PLAN

MOBILITY & FLOW - TRANSPORTATION, ROADS, SUMMER TRAILHEADS, WINTER ACCESS

The challenge of moving more people around for transportation or recreation is improved by infrastructure, services, signage and communications. To that end, many significant efforts are underway to address mobility and flow within Truckee, to/from the Ski Areas and Lake Tahoe.

Through long-term planning (2-10 years) between Placer and Nevada Counties (i.e. the Resort Triangle Plan), the Town of Truckee (2040 General Plan, Two Year Work Plan, Truckee River Revitalization Committee, Trails and Bikeways Master Plan, Measure U Committee), Palisades Tahoe and Northstar California operation plans (winter 2024 parking reservations), TART Connect, Truckee Trails Foundation and USFS Truckee Ranger District plans, Nevada County Master Recreation and Resiliency plan and more, these complex infrastructure challenges are high priorities for every entity that serves Truckee's community - all of which are represented by leadership on the Truckee Stewardship Council.

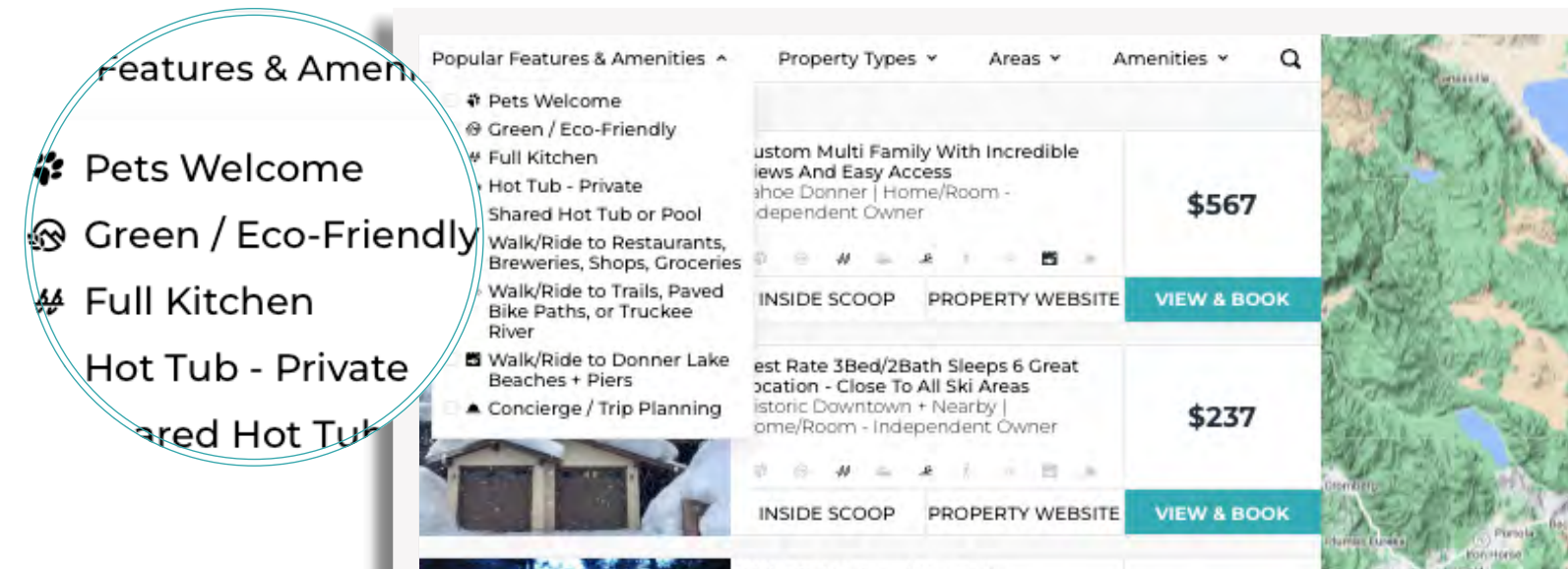
In addition to facilitating the Council, Visit Truckee-Tahoe contributes to mobility and flow through the Brand Experience pillar (destination management). Through funding and staff time, VTT supports programs and services including and not limited to the Johnson Canyon snow play/trailhead Master Plan (Truckee Donner Land Trust), West End Beach snowplowing (Tahoe Backcountry Alliance), Donner Lake Peak Period Mitigation Study (Truckee River Watershed Council) TART Connect MicroTransit (Town of Truckee), maps for winter recreation and regional orientation, 36 summer trailhead signs and much more. See [VisitTruckeeTahoe.com/programs](https://www.visittruckee-tahoe.com/programs).

VISITOR COMMUNICATIONS (CHANGING MINDSETS)

Perhaps the greatest impact Visit Truckee-Tahoe can have is in our messaging - influencing visitor mindsets away from stay and take, to stay and pay attention, know the rules of the road, spend a few nights (versus just the day) give back, participate, be a local, shop local, contribute to our community, have fun, enjoy and come again. Visit Truckee-Tahoe is proud of messaging that goes beyond Leave No Trace, to educating how visitors can actually make a positive impact.

While stewardship has permeated all visitor messaging since VTT formation three years ago, we are excited to roll out the new, ten page, Sustainable Truckee Pre-Arrival Guide encouraging visitors to join our Sustainable Truckee mantra - from turning out the lights so we enjoy dark skies, to using Green Boxes, E-Bikes and TART Connect.

We continue to manage a \$80K annual Sustainable Truckee gift card program and monthly E-newsletters that encourage pre+post peak period visitation. In response to a communication gap, we developed a 4th of July microsite, and added daily construction updates on the popular Truckee-Tahoe Travel Alert. The work is never done, which is why we are hiring a third staff member to join our mission. Our partners on the CCC -Leadership Forum including Ski Area General Managers and their teams, plus North Tahoe Community Alliance (NTCA) could not be more important on this quest for unified, regional messaging.



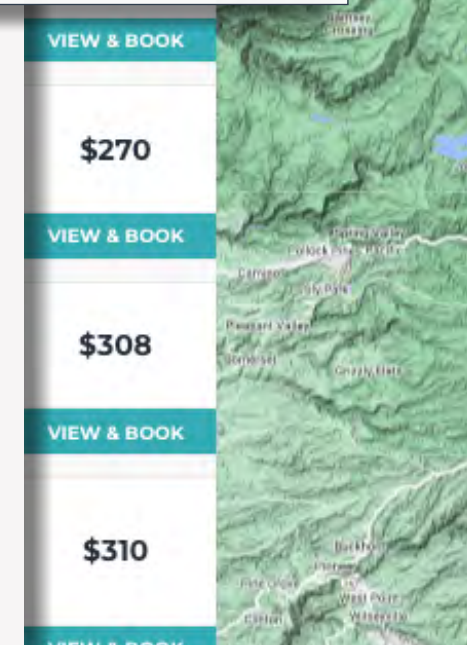
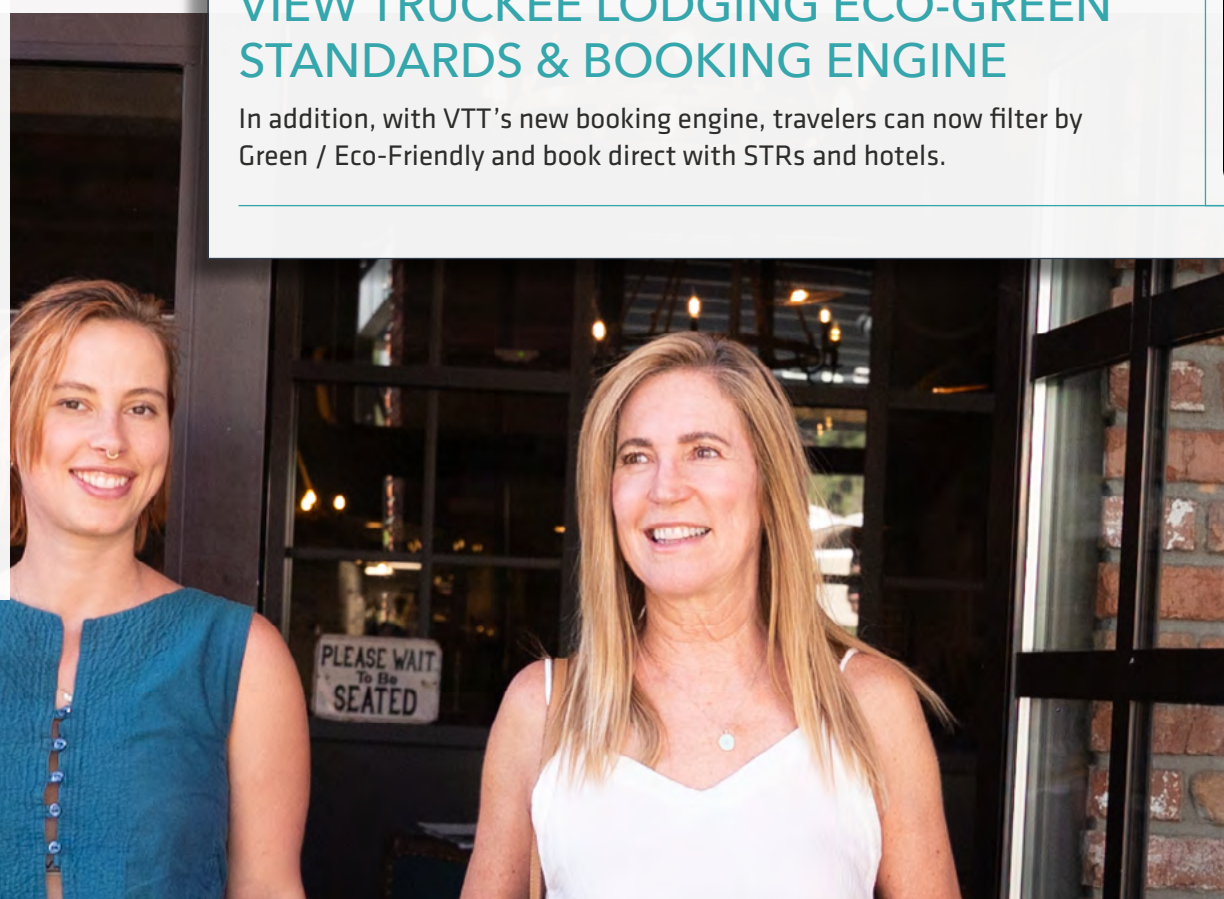
TRUCKEE LODGING & CLIMATE ACTION (WASTE, ENERGY, WATER)



The first of its kind amongst California tourism organizations, we developed Eco/Green Lodging Standards for STRs in 2023 with research from Sierra Business Council and feedback from Truckee's independent host community and Property Managers. Modeled after Surfrider Foundation's Ocean Friendly Restaurants, the standards recognize and reward STR homeowners who meet critical criteria in reducing waste and supplies, saving energy, conserving water, and supporting sustainable transportation. We also acknowledge Truckee's hotels who comply to a high bar for "green" corporate standards.

VIEW TRUCKEE LODGING ECO-GREEN STANDARDS & BOOKING ENGINE

In addition, with VTT's new booking engine, travelers can now filter by Green / Eco-Friendly and book direct with STRs and hotels.



TRUCKEE STEWARDSHIP PLAN - STATE, REGIONAL, COUNTY, LOCAL SUPPORT

While Visit Truckee-Tahoe has benefited from the talented consultant firm Future iQ (Acknowledgments), we could not do what we do, without the concerted efforts of so many entities committed to a Sustainable Truckee.

VISIT CALIFORNIA - SUSTAINABILITY & STEWARDSHIP PLAN BY REGION (HIGH SIERRA)

Focused on mountain towns (primarily winter ski destinations) Visit California has invited VTT Staff to work on a committee aimed at economic resilience and stewardship for the state's "mountain" travel product. This is a two year process that has just begun, guided by JLL Consultants.

CALIFORNIA TRAVEL ASSOCIATION - SUSTAINABILITY COMMITTEE

Cal Travel invited VTT to help inform this new committee's dialogue, best practices and conference planning. As an advocacy organization, a real shift or expansion to include stewardship/climate legislation lobbying is still to be seen. The Committee has fostered helpful relationships for VTT ranging from Sonoma County to San Luis Obispo.

NEVADA COUNTY - RECREATION OBJECTIVE (NEW) & CCC

Thanks to the leadership of Supervisor Hardy Bullock, eastern Nevada County and Truckee is a high priority given the new "Recreation" Objective, the Recreation and Resilience Master Plan and the CCC - Leadership Forum.

LAKE TAHOE STEWARDSHIP PLAN

VTT 's CEO worked on the development of the Lake Tahoe Stewardship Plan and now sits on the Tahoe Stewardship Council. A regional approach is essential to a positive, regional "Lake Tahoe - Truckee" destination perception.

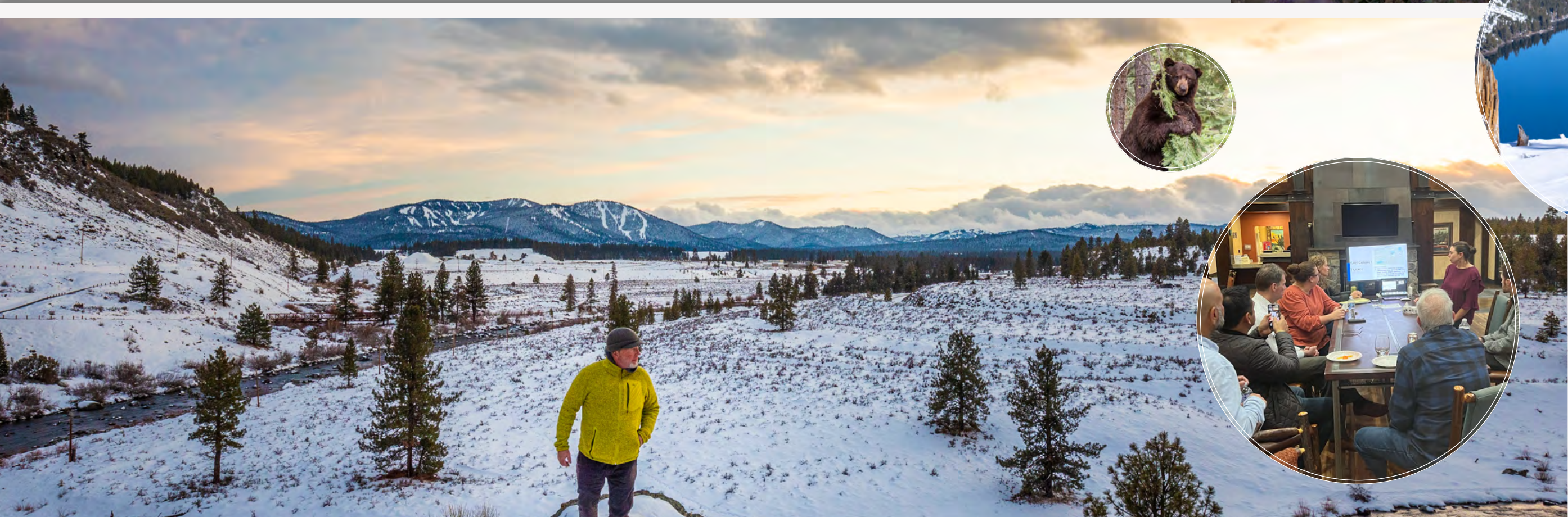
The Tahoe Stewardship Plan helps to cultivate important relationships amongst the four "DMOs" Destination Marketing/Management Organizations (Visit Truckee-Tahoe, North Tahoe Community Alliance, Travel North Tahoe Nevada, and Visit Lake Tahoe, South) in addition to stewardship entities such as the Tahoe Fund, the Tahoe Regional Planning Association (TRPA), Tahoe Prosperity Center and more.

CLIMATE TRANSFORMATION ALLIANCE (CTA)

Visit Truckee-Tahoe is a member of the CTA, a regional public-private partnership committed to addressing climate change with the goal of carbon neutrality by 2045. Our new Eco/Green Lodging Standards provides guidelines for over 1200 short-term rentals in Truckee, with energy, waste and water reduction measures.

TOWN OF TRUCKEE - KEEP TRUCKEE GREEN

Last, but certainly not least, Town of Truckee is a leader in green focused cities through the dedicated Keep Truckee Green department. Visit Truckee-Tahoe works closely with KTG Staff on our joint crusade to build Truckee's reputation as a sustainable mountain town by helping to bridge communication between Town of Truckee and hoteliers, property managers and STRs.





TTBID ANNUAL REPORT FY 23/24

As specified in the [Town of Truckee and Visit Truckee-Tahoe \(VTT\) Agreement](#), VTT serves as the Owners Association for the Truckee Tourism Business Improvement District (TTBID). Pursuant to Exhibit A of the agreement, VTT provides an annual report to the Town of Truckee. For FY 23/24, this page (highlights in green) serves as VTT's Annual Report.

IN REFERENCE TO EXHIBIT "A" SCOPE OF SERVICES

Visit Truckee shall:

1. Provide projects, programs, and activities that benefit assessed businesses within the TTBID in accordance with the TTBID Management District Plan, as it may be amended.

A. The TTBID range of improvements and activities allowed are described on pages 8+ 9 of the 2020-2025 Management District Plan (MDP) with underlying law beginning on page 15.

2. Perform the obligations set forth for the TTBID owners' association in the Property and Business Improvement District Law of 1994, including without limitation:

A. Preparation of the annual report required by law, which shall include:

- i. Any recommended changes to the boundaries of the TTBID; none.
- ii. The improvements and activities to be provided for the following fiscal year; see Brand Pillars, Priorities and Goals described in the Visit Truckee-Tahoe Two Year Strategic Plan for both FY 23/24 and 24/25.
- iii. An estimate of the cost of providing the improvements and activities; \$1,708,105.
- iv. The method and basis of levying the assessment, in sufficient detail to allow each business owner to estimate the amount of the assessment to be levied against his/her business for that fiscal year; July 1, 2023 -June 30, 2024 the Truckee Tourism Business Improvement (TTBID) fee continues unchanged at 1.25% per room night base rate plus any and all required lodging provider fees.
- v. The amount of any surplus or deficit revenues to be carried over from a previous fiscal year; \$908,105.00 as of June 30, 2023.
- vi. The amount of any contributions received or to be received from sources other than TTBID assessments. In FY 23/24, \$5,000 was received as a partial refund from an event sponsorship. In addition, interest earned and dividends came to \$4,669.43.

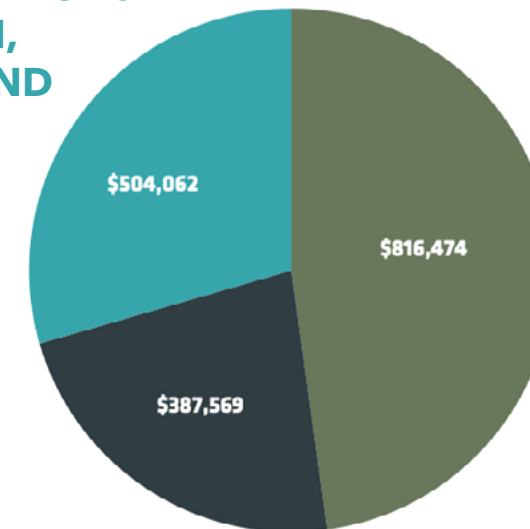
B. Delivery of the annual report on or within sixty (60) days following the receipt of the final remittance of the TTBID's previous fiscal year.

YEAR OVER YEAR COMPARISON TTBID MANAGEMENT DISTRICT PLAN CATEGORY REQUIREMENTS

TTBID MANAGEMENT DISTRICT PLAN (MDP) CATEGORY REQUIREMENTS	MDP 2020-2025 Required Category %	FY 21/22 Budget	FY 21/22 % MDP Category	FY 22/23 Budget	FY 22/23 % MDP Category	FY 23/24 Budget	FY 23/24 % MDP Category
Administrative	6%	\$58,500	4.14%	\$80,960	5.17%	\$81,774	4.79%
Contingency	5%	\$130,375	9.22%	\$155,230	9.91%	\$87,284	5.11%
TBID Collection Fee	2%	\$8,750	0.62%	\$10,417	0.67%	\$16,000	0.94%
Tourism Enhancement (TE)	87%	\$1,216,887	86.03%	\$1,319,455	84.25%	\$1,523,047	89.17%
		\$1,414,512	100.00%	\$1,566,061		\$1,708,105	

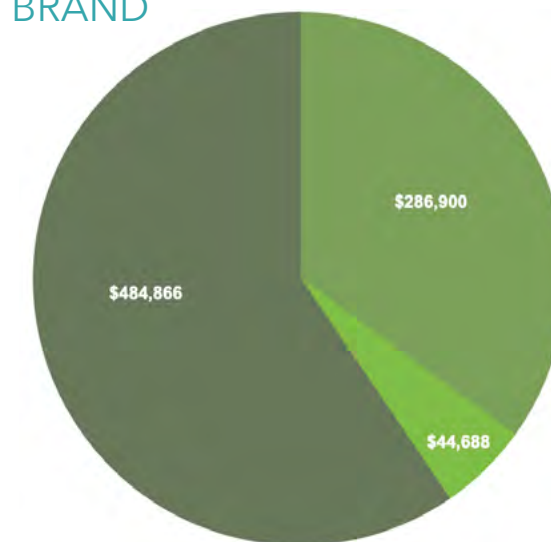
BUDGET ALLOCATIONS ORGANIZATION, RESERVES, BRAND

- BRAND (47.80%)
- ORGANIZATION (22.69%)
- RESERVES (29.51%)



BUDGET ALLOCATIONS - BRAND BRAND PROMISE BRAND SUPPORT BRAND EXPERIENCE

- BRAND PROMISE Overnight Visitor Attraction (35%, \$286,900)
- BRAND SUPPORT Truckee Tourism Ecosystem (5.5%, \$44,688)
- BRAND EXPERIENCE-Destination Management (59.5%, \$484,866)



FY 23/24 BUDGET BALANCE FORWARD, ESTIMATED INCOME, OPERATING BUDGET

BALANCE FORWARD + ESTIMATED INCOME		BUDGET FY 23/24
BALANCE FOREWARD: June 30		\$908,105
ESTIMATED TT BID INCOME: 1.25% Estimated Collections		\$800,000
Subtotal Income+Balance Foreward		\$1,708,105
RESERVES - Contingency		\$87,284
RESERVES - Tourism Enhancement (TE)		\$416,778
Subtotal Reserves		\$504,062
BALANCE REMAINING: Operating Budget		\$1,204,043

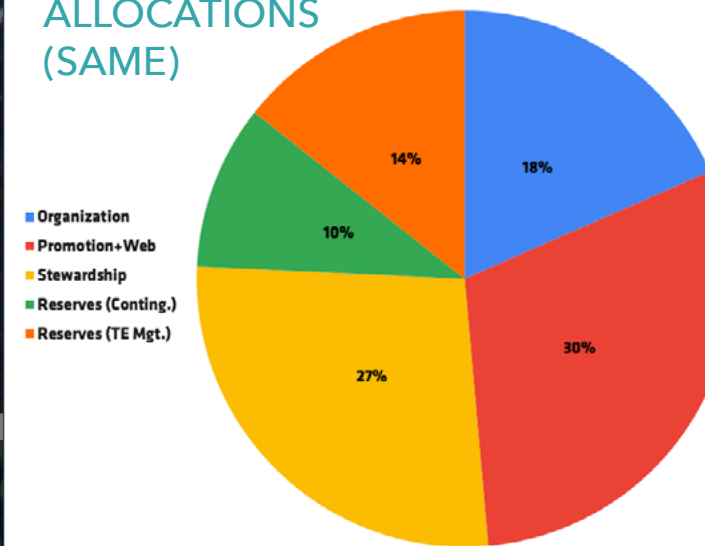
FY 23/24 BUDGET YEAR OVER YEAR COMPARISON

		FY 21/22		FY 22/23		FY 23/24	YOY DIFF
BUDGET		\$1,398,512		\$1,566,061		\$1,708,105	\$142,044
Organization	18%	\$260,750	18%	\$288,686	23%	\$387,569	\$98,883
Promotion+Web	30%	\$420,550	30%	\$472,250	27%	\$461,188	-\$11,062
Stewardship	27%	\$374,000	27%	\$425,141	21%	\$355,286	-\$69,856
Reserves (Conting.)	10%	\$130,375	10%	\$155,230	5%	\$87,284	-\$67,946
Reserves (TE Mgt.)	14%	\$212,837	14%	\$224,753	24%	\$416,778	\$192,024
	100%	\$1,398,512	100%	\$1,566,061	100%	\$1,708,105	

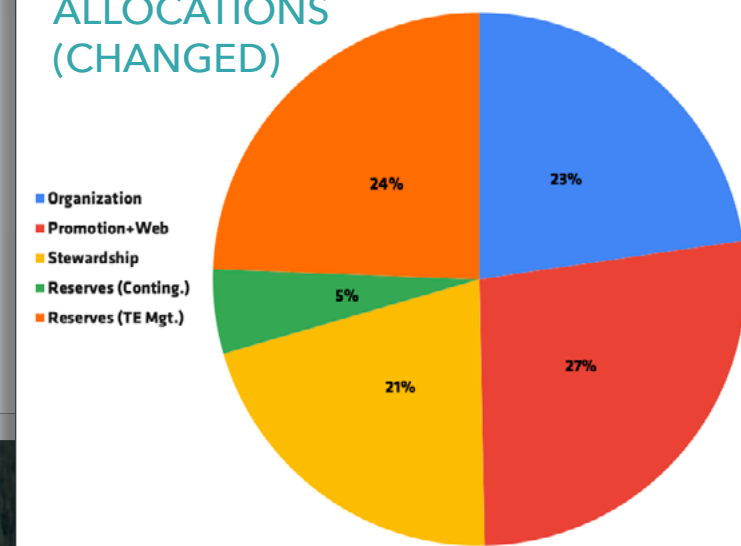
FY 22/23 BUDGET VS. ACTUAL

FY 22/23 ACTUAL			
BUDGET	ACTUAL	DIFF	
\$80,960	\$59,023	\$21,937	ADMINISTRATIVE
\$155,230	\$155,230	\$0	CONTINGENCY
\$236,190	\$214,253	\$21,937	Subtotal
BUDGET	ACTUAL	DIFF	
\$1,319,454	\$953,965	\$365,489	TOURISM ENHANCEMENTS
\$10,417	\$17,126	\$6,710	TT BID COLLECTION COSTS
\$1,566,061	\$1,185,344	\$380,717	TOTAL

FY 21/22 & FY 22/23 BUDGET % ALLOCATIONS (SAME)

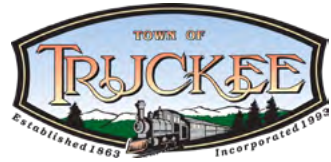


FY 23/24 BUDGET % ALLOCATIONS (CHANGED)



TRUCKEE TOURISM ECOSYSTEM KEY GROUPS

We collaborate with local Truckee and Lake Tahoe organizations and initiatives, as well as national organizations, focused on stewardship and sustainability.



ACKNOWLEDGEMENTS

FUTURE iQ - DAVID BEURLE

With leaders of popular worldwide destinations prioritizing sustainability and stewardship, the demand for experienced consultants is unprecedented. There is no silver bullet or perfect template, when it comes to mountain towns seeking balance for a tourism dependent economy with community wellbeing and environmental protection.

Future iQ is a research and consulting company specializing in foresight and strategic planning, and works on regional tourism management projects globally. Their flagship projects include convening local stakeholders to create shared vision; identifying unique assets; and building capacity to create an authentic local tourism product. Sustainable Tourism and destination management are key issues that Future iQ is working on with current clients. Future iQ has worked on tourism projects across the US including in Oregon, Washington, California, Utah, Vermont, New Hampshire and Maine, as well as on destination development projects in European locations including Ireland, Tuscany (Italy), and Northern Spain.



SOCIAL IMPACT ARCHITECTS - SUZANNE SMITH

In the early years of Visit Truckee-Tahoe (2020-2021 Covid-19), Suzanne Smith helped Visit Truckee-Tahoe have groundbreaking conversations about a new tourism authority unlike any other, with Board and Staff structure needed to balance social impact with economic resilience. Introduced to VTT by Stacey Caldwell of the Truckee Tahoe Community Foundation, Suzanne is an inspiring TEDX speaker, coach and MBA graduate of Duke University's Fuqua School of Business.



Photos throughout report courtesy of Paul Hamill, Nicole Dreon, First Tracks Productions, and Visit Truckee-Tahoe.

CONTACT US

For general inquiries, please email info@visittruckeetahoe.com, call (530) 536-0540, or visit visittruckeetahoe.com/contact.



SustainableTruckee.org



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APPENDICES

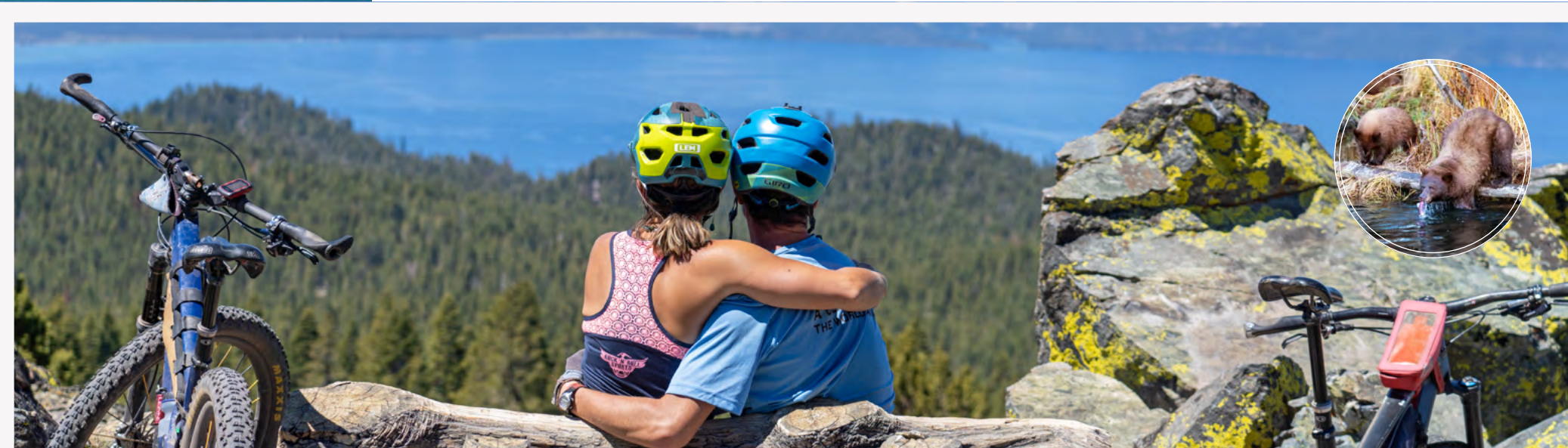
APPENDIX A - THE ECONOMIC IMPACT OF TRAVEL, TRUCKEE 2022



APPENDIX B - TRUCKEE STEWARDSHIP COUNCIL ROSTER



QUICK SUMMARY - VISIT TRUCKEE-TAHOE TWO YEAR STRATEGIC PLAN





VISIT
TRUCKEE
TAHOE

TWO-YEAR STRATEGIC PLAN
FY 23/24 + FY 24/25

Truckee, California | November 2023