

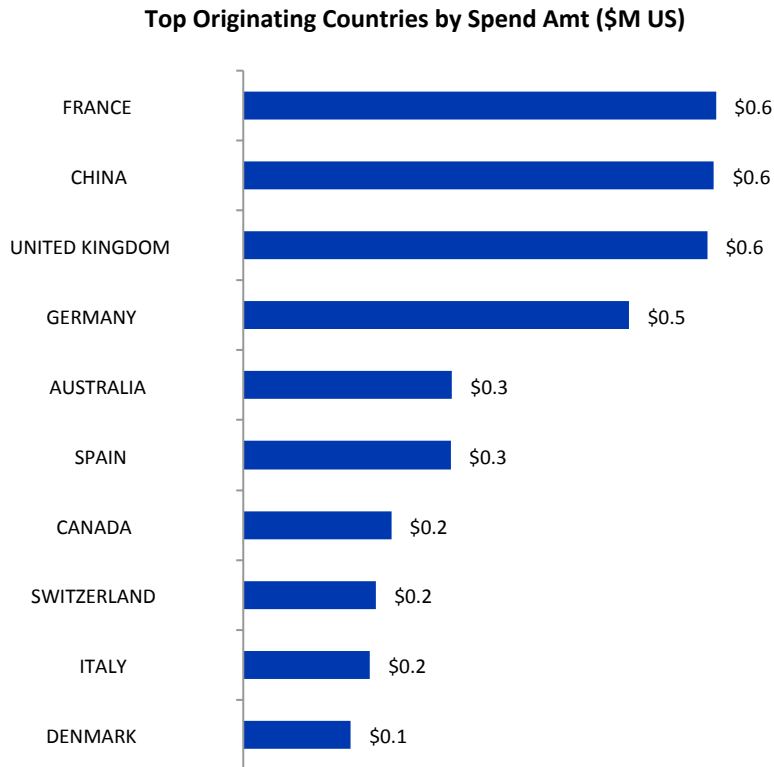


**Michael Vanderhurst
International Update
February 2018**

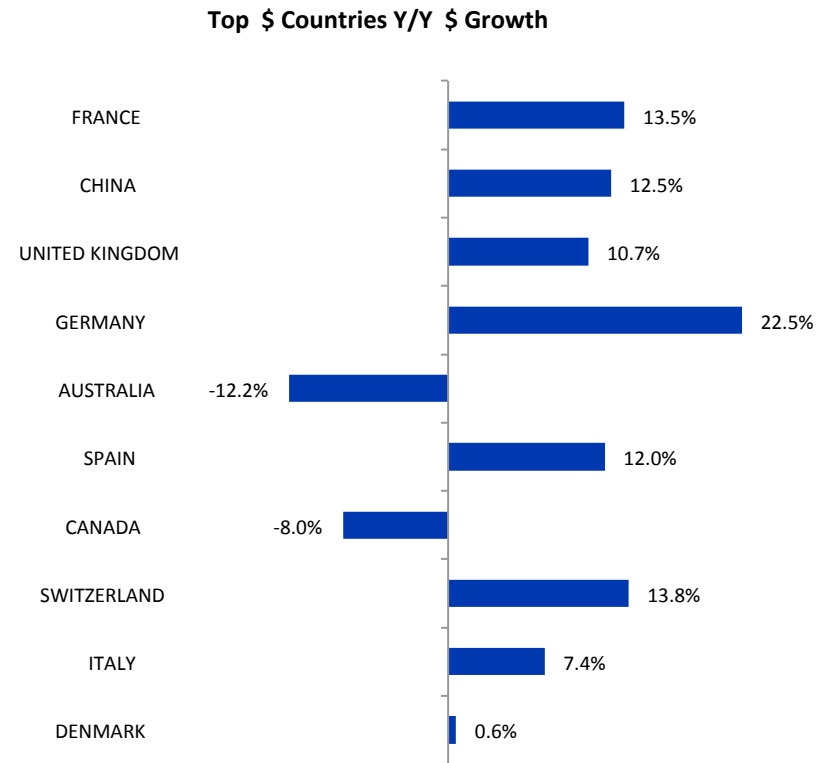
2016 International Spend: \$4,925,812.

2016: 10.4% growth Y/Y

Top Countries by spend(\$M US)



Top Countries Y/Y growth



2017 USA / California

- International visits to the USA -4% in 2017 (Y/Y)
- International visitors to California +0.4% in 2017 (Y/Y)

2017 Mammoth Lakes

- 2017 International Spend: \$5,448,625
- 2017: +10.6% growth (Y/Y)

International Agencies and Markets

UK / Ireland

- Black Diamond: shared with MMSA; TT /PR
- BD has VC; shared messaging
- traditionally a winter market; summer numbers growing
- USD weak vs Sterling Pound = value destination
- plenty of lift into California / Las Vegas
- 2017 annual spend: \$593,926; -5.2%
- 2017 PR value: \$24,061,683.

International Agencies and Markets

France

- MNO: represented under HSVC; TT / PR
- MNO has VC; shared messaging
- Traditionally a summer / fall market
- Euro still strong; US a value destination
- Plenty of lift into California; Air France into SFO
- 2017 annual spend: \$676,393; +14.7%
- 2017 PR value: \$3,381,372 USD

International Agencies and Markets

Germany

(Austria, Switzerland)

- MSI: solo contract; TT /PR; VC & BUSA
- traditionally summer / fall
- Euro still strong: US a value destination
- Plenty of lift into CA / Las Vegas
- 2017 annual spend: \$673,425; - 7.1%
- 2017 PR value:\$3.4 million

International Agencies and Markets

Italy

- Masters Consulting: solo contract; TT / PR
- Traditionally a summer / fall market
- Euro still strong; US a value destination
- Plenty of lift into CA / Las Vegas
- 2017 annual spend: \$165,536; +12.6%
- 2017 PR value: \$326K

International Agencies and Markets

Australia /New Zealand

- Gate 7: shared contract with MMSA; TT / PR
- Gate 7 has VC / BUSA; shared messaging
- traditionally winter / opposite hemisphere
- plenty of lift into CA
- Bad exchange rate; US NOT a value destination
- 2017 annual spend: \$582,315; +71.7%
- 2017 PR value: \$1,739,078 USD

International Agencies and Markets

China

- AviaReps; shared contract with MR; TT/ social
- AviaReps has VC & SV; shared messaging
- New market for MLT; focus on 2022 games, summer/fall FIT groups
- Plenty of lift; 10yr Visa waiver
- 2017 annual spend: \$536,508; -9.4%

International Agencies and Markets

South Korea

- AviaReps; shared contract with MR; TT/PR
- AviaReps has VC; shared messaging
- New Market for MLT; focus on 2018 games, FIT, “Bleisure” travelers into LA/SFO
- Plenty of Lift into CA; large communities in CA
- 2017 annual spend: \$58,829; -8.4%
- 2017 PR value: \$442,000 USD

International Agencies and Markets

Scandinavia

(Denmark, Norway, Sweden, Finland, Iceland, Latvia, Lithuania, Estonia)

- Atlantic Link; solo contract; TT/PR
- Atlantic Link has VC & YNP; shared messaging
- New Market for MLT; summer / fall FIT; potential for winter
- Good Lift into CA
- 2017 annual spend: \$273,922; +7.1%
- 2017 PR value: \$505,174

Smaller International Partnerships

Visit USA Memberships

Belgium

2017 annual spend: \$128,898; +16.6%

Netherlands

2017 annual spend: \$117,120; +10.6%

Potential Future Markets

Mexico

2017 annual spend: \$158,550; +40.6%

Canada

2017 annual spend: \$260,028; +40.9%

Brazil

2017 annual spend: \$97,763; +16.9%

Spain

2017 annual spend: \$292,776; +13.2%

India

2017 annual spend: \$16,170; -15.6%

International Messaging

Winter

Long season; quality of snow; legitimate ski town; Ikon Pass?; Play like an Olympic Athlete; Unique California experience; Las Vegas/LA/SF

Summer

Make ML your base; explore YNP, Mono Lake, Bodie, DVNP from ML; avoid valley crowds, heat; soft adventure; easy access to nature; families, FIT, small groups

Strategies

Sales Training, press visits, travel shows

Hosted FAM's in destination: TT / Media

Print Coop's, digital presence; social media

Partnerships with BUSA, VC, HSVC, Mono County, MR/Alterra

Native language videos

VisaVue tracking

Future opportunities and threats

Pro's

- BUSA “National Parks” push; BUSA in general
- VC budget increase to \$100 million; all international
- desired to experience new, off beaten path; millennials
- La Vegas, LA, SFO triangle
- Continued terrorism in Europe / Med
- Ikon Pass;

Con's

- Global warming; unpredictable winters
- Global warming; Tahoe effect
- Global warming; California wildfires
- US political scene: aka, Trump
- US gun violence in the news