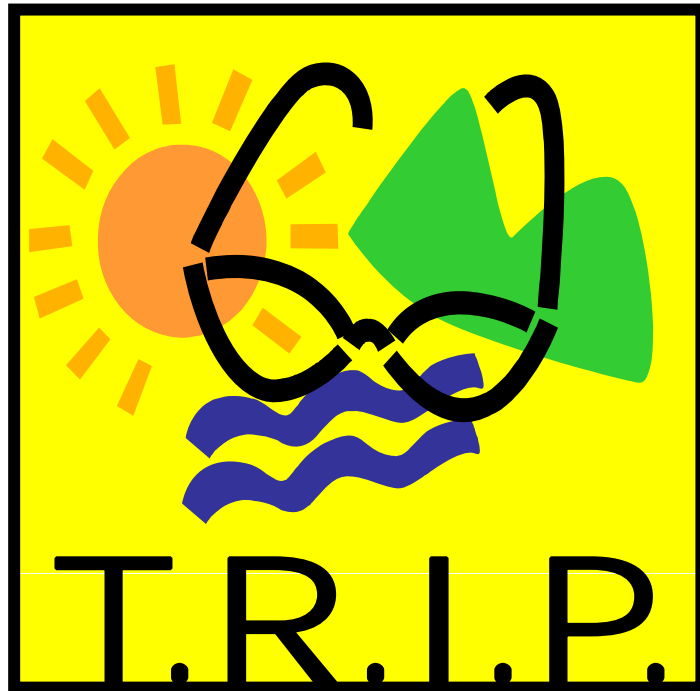


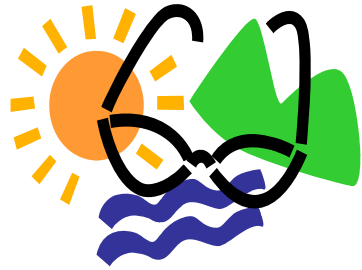
Travel, Recreation, Infrastructure & Pleasure



Travel. Recreation. Infrastructure, Pleasure.

**Learning from the Source:
Lake Tahoe, NV & CA
Las Vegas, NV
Aspen, CO**

Pekka Pärnänen, Maria Pienaar, Finpro, Silicon Valley

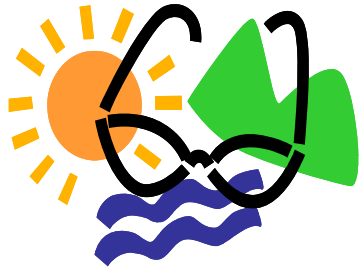


T.R.I.P. -

**TRAVEL. RECREATION.
INFRASTRUCTURE. PLEASURE**

TIA (Travel Industry Association) 2005 Numbers

- Generate \$1.3 trillion in U.S. every year, 7.3 million jobs
- ~ 50 million international visitors spent \$105 billion traveling in the U.S. '06
- The top three activities planned by summer travelers are:
 - visiting friends and relatives (55%),
 - going to a beach or lake (38%)
 - visiting small towns or rural areas (27%).
- Top planned summer travel activities are:
 - visiting cities/urban areas (21%),
 - visiting national or state parks (20%),
 - visiting historic sites (20%),
 - camping, hiking or climbing (16%),
 - fishing (15%),
 - attending a family reunion (14%),
 - visiting a theme/amusement park (15%),
 - visiting a museum (14%),
 - going to a casino (14%).



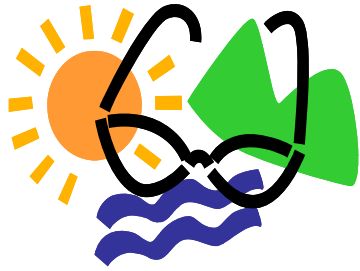
Travel Bookings

TIA 2005 numbers

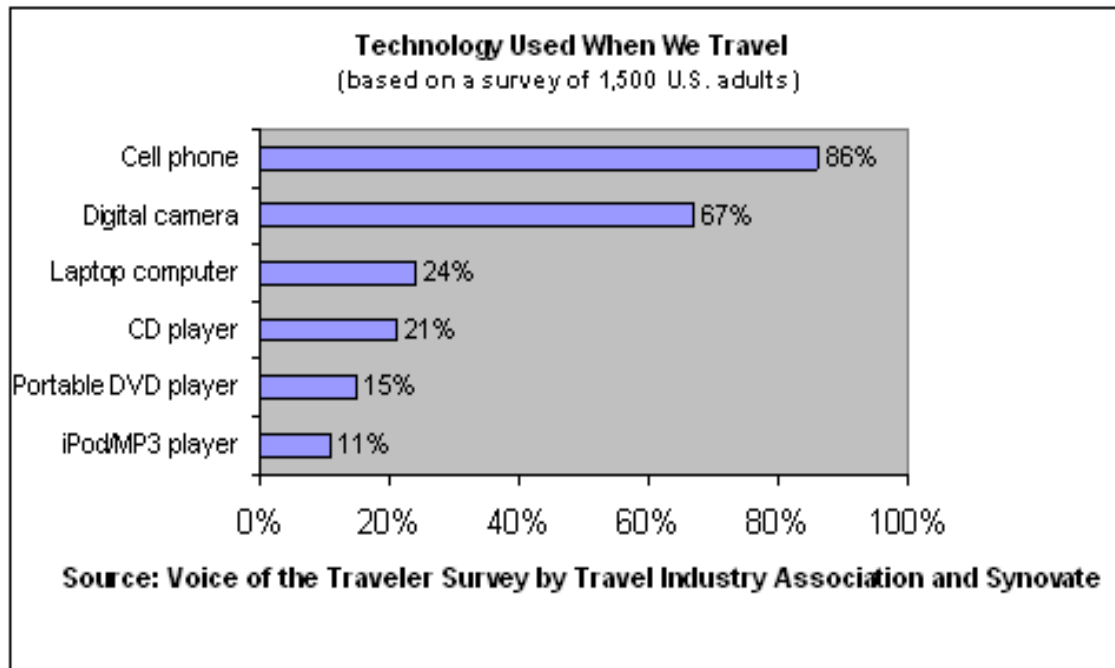
- Travel reservations
 - 35% online reservations (35%), an increase of 25 percent from the year before.
 - Calling transportation carrier 800 telephone numbers, usage down 16% from '04.
 - 4% bookings through travel agents, similar to '04 (5%).

- Accommodation bookings
 - 24% online reservations in 2005 (24%), up 9 percent from 2004.
 - Hotel chain websites were used most often followed by other online booking services
 - Nearly as many travelers used 800 telephone reservation numbers, down 5% from '04
 - The largest share made reservations directly with the property, down from '04
 - 4% bookings through travel agent, similar to '04 (5%).

- General
 - Online bookings drive spending - \$754 vs. \$406 (calling) vs. \$219 (no advance booking)
 - Internet-booked trips drive activities – 2.3 vs. 1.7 (calling) vs. 1.5 (no advance booking)
 - Avg age 44-45 (online and calling) vs. 49 (travel agents)

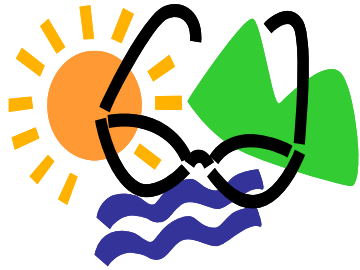


Technology Used on the Road



- 18% to stay connected with family and friends
- 16% - while traveling to find places to visit or things to do.
- 15% choose accommodation based on high-speed Internet or Wi-Fi access.
- 10% to stay in touch with the office
 - 9% feel no choice
- 6% like to work while on vacation.

TIA 2005 numbers



Location Service & Activities Comparison

Las Vegas

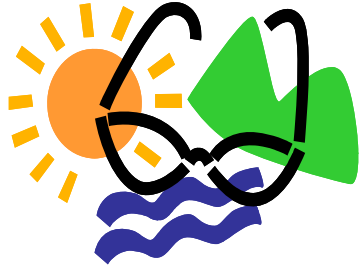
- City
- Year Round
- Gambling (main)
- Convention
- Sports (Golf)
- Shows and events (main)
- Shopping (malls)
- Amusement
- Weddings
- Sites/recreation
- Real Estate
- Movie/TV shows
- 24 hour city
- Airport (International) in Vegas
- University

Lake Tahoe

- 2 states, many sites
- Year Round (almost)
- Gambling
- Convention (almost)
- Sports & Recreation (winter & summer)
- Shows (some)
- Weddings (location)
- Sites/recreation
- Real Estate
- Movies (some)
- Airport in Reno & Sacramento (30-60 min)
- Driving from Bay Area

Aspen

- 'Skitown' (high-end)
- Mainly Winter, developing Summer
- Sports & Recreations (winter & summer)
- Real Estate
- Airport in Denver & Grand Junction (2-3 hrs.)



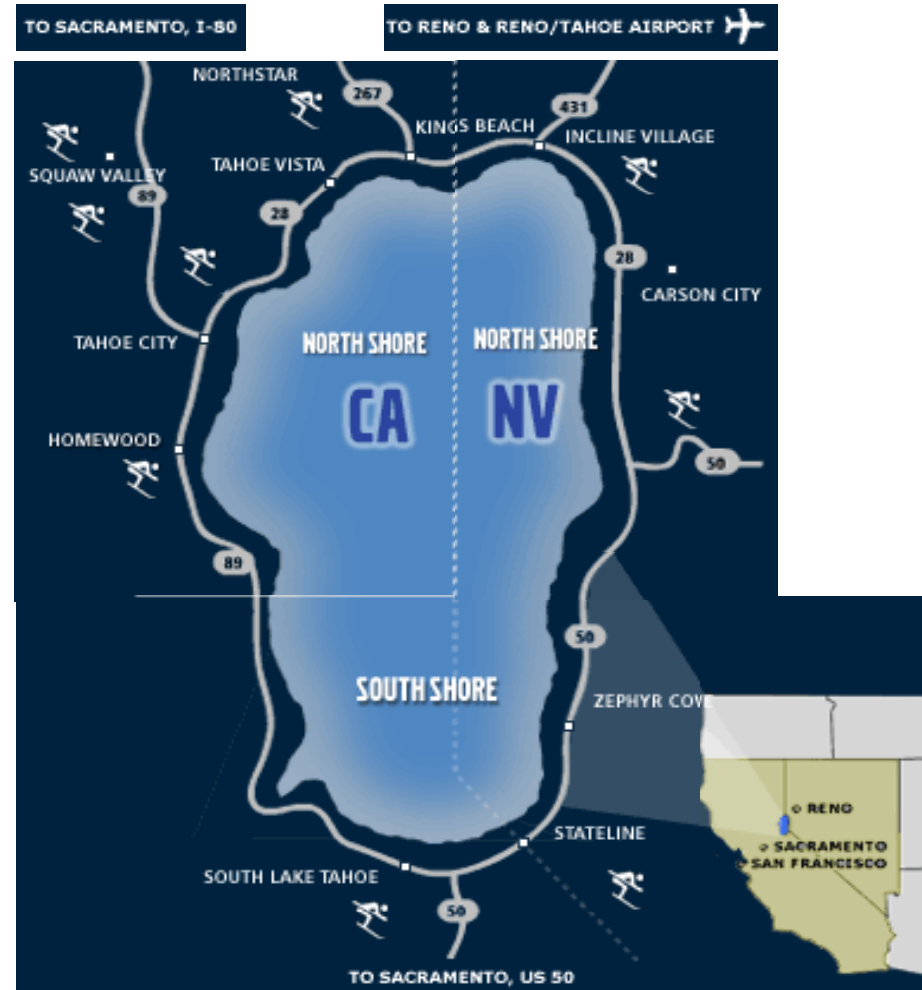
Targeted Service Offering List

- Services Segments:
 - Entertainment
 - Dining & Nightlife
 - Shows
 - Convention
 - Shopping
 - Recreation
 - Sports
 - Sites/Sightseeing/Nature

- Services infrastructure that enables advanced services:
 - Logistics & Transportation
 - Bookings, Reservations & Ticketing
 - Advertising (Online, Location Based Services, Context Based)
 - IP based infrastructure (Internet, Wireless, Mobile)
 - Repeat visits
 - Searching



Lake Tahoe





North Lake Tahoe Players

North Shore, NV - Incline Village/Crystal Bay Visitor's Bureau

North Shore, CA – North Lake Tahoe Resort Association & Chamber of Commerce



Special Services (banks, construction, legal, real estate agencies)



South Lake Tahoe Players

South Lake Tahoe Chamber of Commerce



LAKE TAHOE
VISITORS AUTHORITY



Special Services (banks, construction, legal, real estate agencies)



Tahoe Observations

- Visitor's Authorities, Visitor Bureaus and Chamber of Commerce organizations own Tahoe "area" brand and promotion.
- Limited funding – private & state.
- Services between North & South Shore NV and CA sites not linked.
- Hotels & resorts promote own brand.
- Main focus still Internet marketing related.
- Visitor Centers costly – looking at kiosk and other technologies.
- Looking at additional revenue opportunities.



ONLY
Vegas

- 40+ million Visitors
- 25,000 conventions
 - 6+ million attendees, \$8+ billion impact
 - 50% of room occupancy through year
- 90.4% room occupancy @ \$120 avg. /night
- \$10+ billion gaming revenue

Stay



Play





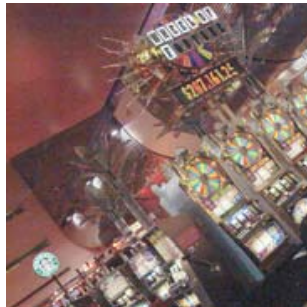
MCCARRAN

INTERNATIONAL AIRPORT

LAS VEGAS, NEVADA



- 5th busiest airport in US
- 44.3 million passengers per year
- 50% of travelers use air transport
- Each new room adds 320 passengers/year
- 2011: 30,000+ new rooms, 10 million passengers

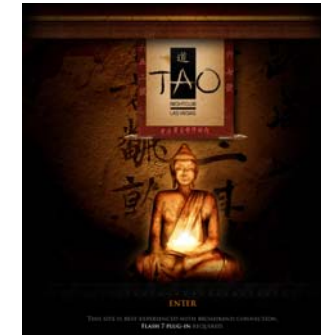




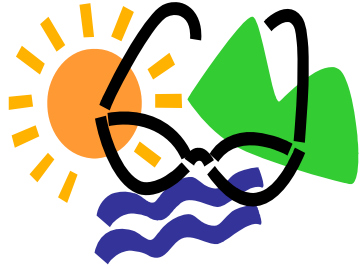
Las Vegas Players

LAS VEGAS CONVENTION AND VISITORS AUTHORITY

- Get Feet into Vegas
- Owns Vegas brand
- Focus on Consumer & Tourism



- Get feet into beds and to casinos
- Promote own brand

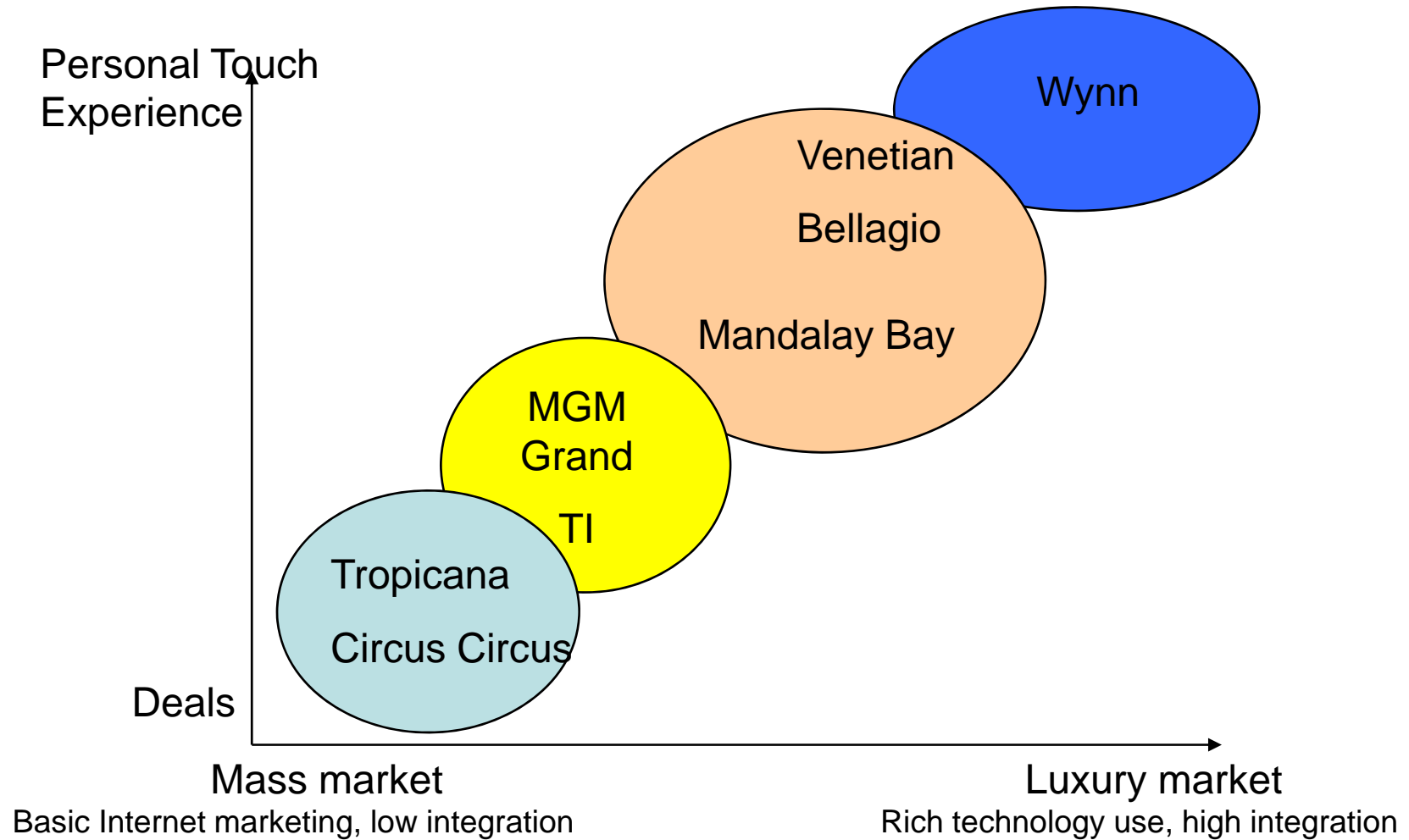


Las Vegas Convention & Visitors Authority (LVCVA)

- Key partner to promote Las Vegas - owns Las Vegas brand and brand messaging.
- NGO - get funding from room taxes (9%)
- Board comprise of city, state and hotels representatives.
- Consumer - own www.visitlasvegas.com - managed by 3rd party for bookings and information to Las Vegas. Partners with www.vegas.com - privately owned online booking co.
- Neutral to all resort partners.
- Businesses - have sales staff promoting conferences and meetings and provide all logistics incl. registration staff.
- Owns and promotes LVCC (Las Vegas Convention Center)
- Main technology focus on Internet marketing and providing tools for partners and business travelers.
- Wireless - starting to look at how could use.



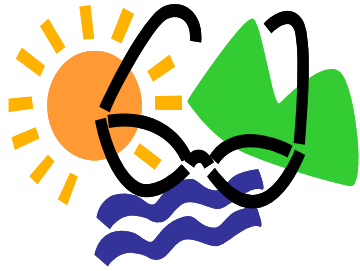
Hotels & Resorts





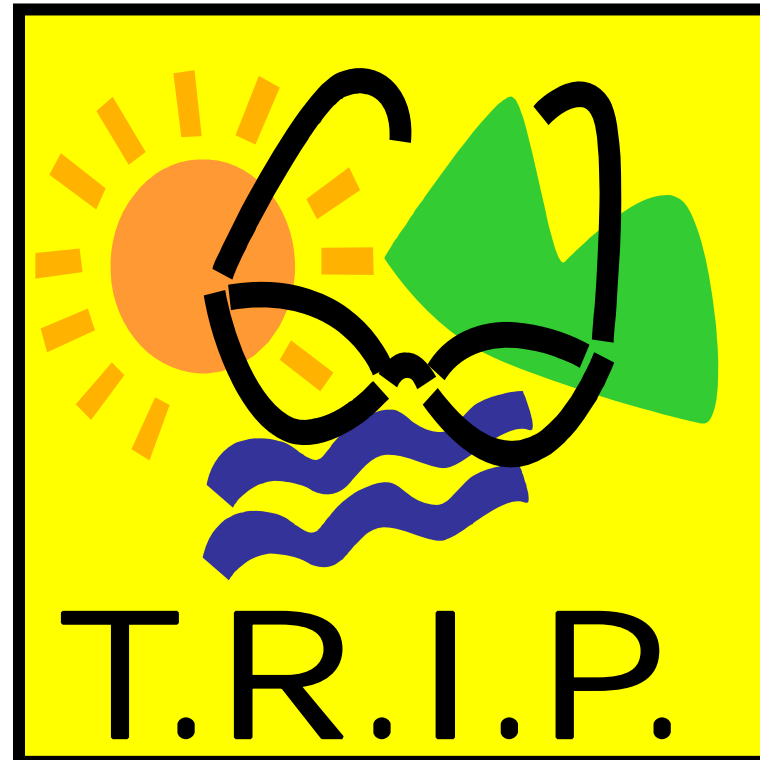
Las Vegas Observations

- LVCVA key player in promoting destination
- Business processes clear between LVCVA & players for Vegas brand
- Marketing and Technology use varies greatly from hotel to hotel (mass market to luxury)
- Online focus moving towards social networking media – YouTube
- Mobility – starting to look at what can do with medium.



Technologies & Infrastructure for Services

- Wireless and Mobile
 - Reservations and ticketing (events, shows, sports)
 - Location based services
 - Context based advertising
- On-line
 - Reservations and ticketing (events, shows, sports)
 - Bundled services (one window)
- Logistics and Transportation
- Events
 - Technologies for increase interactivity
- Customer care
 - On site and after
- Extend expenditure
 - Use money for something else instead of waiting in lines
- Internet access
- Search
 - How to find (relevant) information



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