



AGENDA

Visit San Luis Obispo County Marketing Committee

Visit San Luis Obispo County Marketing Committee Agenda

Tuesday, December 8, 2015

8:30am

Embassy Suites

333 Madonna Rd, San Luis Obispo, CA 93405

1. CALL TO ORDER
2. PUBLIC COMMENT (On Non-Agenda Items)

ANNOUNCEMENTS	C. Davison
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CONSENT AGENDA – <i>motion required</i>	C. Davison
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3. Approval of November 10, 2015 Marketing Committee Meeting Minutes

BUSINESS ITEMS	C. Davison
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4. Update on Previous Month Board Meeting (15 min)

Staff will provide an update on November's BOD meeting, including booking engine functionality discussion and approval of new VSLOC website build.

5. SAVOR the Central Coast Recap (15 min)

Staff will provide a recap on the 2015 Sunset SAVOR the Central Coast event and economic analysis.

PRESENTATION	M. Cano
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6. DMO Spotlight – City of San Luis Obispo (10 min)

The featured destination will provide an update on their market and happenings in their community.

PRESENTATION	M. Astone
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7. Catalyst Marketing (60 min)

The marketing agency will provide an update on current and future projects and results.

- a. Research RFP Review
- b. Fall Campaign Update Including Results to Date
- c. Countywide Icon Usage By Community DMOs
- d. Additional Co-op Options

CEO Report	C. Davison
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8. CEO Report (10 min)

Staff will provide an update on current projects and areas of focus for the months ahead.

ADJOURN.

– Next Board Meeting –
Tuesday, January 12, 2015
Location: TBD

Brown Act Notice: Each speaker is limited to two minutes of public comment for items not on the agenda. Public comment for each agenda item will be called for separately and is also limited to 2 minutes per speaker. State law does not allow the board to discuss or take action on issues not on the agenda, except that members of the board may briefly respond to statements made or questions posed by the person giving public comment. Staff may be directed by the board to follow-up on such items and/or place them on the next board agenda. The order of agenda items is listed for reference and items may be taken in any order deemed appropriate by the Board of Directors.

ADA Notice: Meeting facilities are accessible to persons with disabilities. If you require special assistance to participate in the meeting, notify Brendan Pringle at (805)541-8000 at least 48 hours prior to the meeting.



Minutes

Visit San Luis Obispo County Marketing Committee

Visit San Luis Obispo County Marketing Committee

Meeting Minutes

Tuesday, November 10, 2015

10:00am

Embassy Suites, San Luis Obispo

333 Madonna Road, San Luis Obispo, CA 93405

1. **CALL TO ORDER:** Chuck Davison

PRESENT: Ashlee Akers, Jim Allen, Cheryl Cuming, Christen Goldie, Brent Haugen, Gordon Jackson, Heather Muran, John Sorgenfrei

STAFF PRESENT: Chuck Davison, Brendan Pringle, Kylee Jepsen, Jordan Carson, Michael Wambolt

Call to Order at 10:01am.

2. **PUBLIC COMMENT (On Non-Agenda Items)**

None.

ANNOUNCEMENTS

Cal Poly continues to look at starting a tourism school; however, this would require an investor if the opportunity exists.

Jepsen noted that ad sales for visitor guides are closing soon. Heather with PACE is currently in town if you need to book a meeting with her.

3. **Brown Act Training**

Brown Act Training has been rescheduled to Monday, November 30th from 8am-10am at the Quality Suites in San Luis Obispo.

Committee Discussion. Muran reported out on Harvest on the Coast. Cuming noted that the formula for the event works well, connecting tickets with hotel stays.

Public Comment – None.

CONSENT AGENDA

4. **Approval of October 13, 2015 Marketing Committee Meeting Minutes**

Davison requested a motion to approve the Consent Agenda as presented.

Committee Discussion – None.

Public Comment – None.

ACTION: Moved by Muran/Akers to approve the Consent Agenda as presented.

Motion carried: 9:0

BUSINESS ITEMS

5. Update on Previous Month Board Meeting

With the resignation of VSLOC Board Chair Kevin Phipps, the composition of the Executive Committee has changed. Jay Jamison is now Chair, Clint Pearce is now Vice Chair, JP Patel remains the Secretary, and John Arnold is the new Treasurer.

The Crisis Communication Plan was approved by the Board. VSLOC is planning to meet with Fire Services to refine the Crisis Communication Plan. Stacie Jacob of Solterra Strategies has developed options for media training. The cost for media training sessions would be between \$10,000-\$15,000.

The Fall Creative Campaign was also approved by the Board.

Committee Discussion – None.

Public Comment – None.

6. Conflict of Interest Policy

VSLOC has developed a Conflict of Interest policy. The purpose is to protect VSLOC's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director, or might result in a possible excess benefit transaction. Davison asked that Marketing Committee members fill out a Conflict of Interest Annual Disclosure form.

Committee Discussion – None.

Public Comment – None.

7. WebDAM Update

VSLOC is working to gather digital assets. Communities are asked to share as many files as they would like. Upload times are flexible, but VSLOC is looking to have all content uploaded in the next couple of weeks. Once all assets have been imported, local DMO partners will be asked to work with WebDAM to ensure their assets are properly tagged/credited. Jepsen is working on the interface portion. Davison noted that the hierarchy of folders will be critical to the organization process.

Committee Discussion. Cano asked how much data the other communities were contributing. Davison noted that there was a wide range from twenty GB to several hundred GB of data, and encouraged destination partners to put as many quality digital assets as possible in order to produce more opportunities for media partners. Haugen asked if DMOs would be able to put folders in the WebDAM system later and add restrictions. Jepsen responded that they will have time to review before it goes live.

Public Comment – None.

8. Booking Engine Update

VSLOC is looking to replace its current JackRabbit booking engine model, which costs \$40,284 annually, and offers less than optimal tracking. Options include a 3rd party solution (likely Regatta), an OTA model (likely Booking.com), and removing the booking engine from the VSLOC website altogether.

Regatta's model directly connects to each facility, and offers robust reporting. The cost would either be an annual fee (equal to JackRabbit) or no fee, but a 10% commission on bookings by suppliers. Davison described the features of the Regatta dashboard and connectivity options. Participating partners have to have a channel management system or pay for Regatta to provide one in order to connect.

The OTA (Booking.com) model would be a free solution to VSLOC, and offers detailed reporting and a 40% revenue share on commissions from lodging partners. Many lodging partners are already connected to Booking.com.

Committee Discussion. Cano noted that she would not recommend custom-building a booking engine, and said that with the Regatta solution, her constituents would likely be opposed to commissions. She also noted that the 40% commission revenue share model with Booking.com seemed interesting. Sorgenfrei recommended avoiding the issue of the booking engine. Jackson asked if Regatta's 10% commission option could be passed on to VSLOC. Davison responded that this was an option. Jackson noted that lodging partners are not going to be interested in paying commission. Cano noted that the channel management system is going to be the barrier for lodging partners. Goldie noted that she would not be interested in the OTA model, but would be interested in Regatta. Apple Farm is on the GDS, but they don't like to use it as their channel manager. Cuming expressed concerns about the marketing presence of Regatta, and stated that Booking.com has more of a marketing presence.

Public Comment – Stacie Jacob of Solterra Strategies recalled that commissions were the reason why VSLOC had originally chosen JackRabbit.

The issue will be presented to the Executive Committee at the next meeting for a recommendation to the Board.

9. SAVOR the Central Coast

Davison requested feedback from the Marketing Committee on their SAVOR experience and any takeaways from this year's event as the Board conducts its review.

Committee Discussion. Sorgenfrei said that Fast Forward Ventures (F2V) did a good job organizing and running the event, but pointed out the lack of involvement he noticed from *Sunset*. He said that *Sunset* should step up to sell tickets and produce more articles and ads leading up to the event. He pointed out that on the Pismo Media FAM, *Sunset* didn't seem to be involved, and that the magazines that they were handing out at the event didn't even highlight SLO County on the cover, but instead highlighted three wine regions outside the county. Haugen agreed, and said that SAVOR should find out what *Sunset* is looking for in the event, and see what they are planning to cover. Cuming mentioned that she wasn't sure about the benefits of having a presence in the Central Coast Pavilion. She said she would like to see that space become more *Sunset*-oriented. She also pointed out that SAVOR should do more of the type of Adventure Tours that have been successful. Haugen noted that he was satisfied with Morro Bay's experience at the Media Tent, but said that Vina Robles seemed more upscale than the Santa Margarita Ranch. Cano said that San Luis Obispo made a large investment with their booth, and they are trying to weigh what was gained from it. However, the amount of time attendees spent at the booth was great. Cuming asked if Hearst Castle was being considered for Opening Night in 2016. Davison noted the significant restrictions, and that additional options were being reviewed for Opening Night. He also noted that SLO County is not yet a four-day market and it is difficult to attract large out of marketing numbers on a Thursday night for a 4 day event.

Public Comment – None.

PRESENTATION

10. DMO Spotlight: Wine Coast Country

VSLOC has decided to start highlighting a different DMO at each of its Marketing Committee meetings. Cuming discussed “Coastal Discovery and Stewardship Month,” a seven-week long event that will bring guests in the months of January and February. Wine Coast Country is partnering with Hearst Castle Theatres to present a special film called “Pelican Dreams.” They also created 35 different stewardship opportunities for guests, offering a positive connection with tourists and residents. Cuming discussed their involvement in The Whale Trail, and noted that 6 signs will be placed soon, with the hope that these signs will give the County the greatest presence on the Pacific Coast.

Committee Discussion – None.

Public Comment – None.

11. Catalyst Marketing

11a. Countywide Icon

Bob Bates of Catalyst Marketing highlighted the goals of the updated countywide icon renditions: 1) create a geo-locator of SLO County, 2) run a common thread through the communities, and 3) create a personality for SLO County that defined the County in one word. Option 1 uses the text “SAN LUIS OBISPO COUNTY” next to the state icon. Option 2 uses the text “CASUAL CA” (with the same font as the VSLOC logo). Option 3 uses the text “Casual CA,” with the “Casual” text in cursive.

Committee Discussion. Sorgenfrei suggested replacing the VSLOC logo with one of the icons, noting that too many logos may be confusing to the consumer. Cuming suggested using the VSLOC logo as the countywide icon. Davison explained that the purpose of the icon was to offer a geolocator of SLO County. Cuming also asked that the county lines be demarcated on the icon. Sorgenfrei asked if Catalyst saw “Casual CA” as part of its marketing, and Bates responded that they do. Haugen noted that Option 1 and the VSLOC logo together would be redundant. Cano said that at a quick glance, viewers might see “Carlsbad” instead of “Casual,” and that she liked the redundancy of the font.

In a vote, six (6) members of the Marketing Committee voted in favor of Option 1; three (3) members of the Marketing Committee voted in favor of Option 3.

The item, and the marketing committee’s recommendation, will be reviewed by the Board at the next meeting.

Public Comment – None.

11b. Marketing Plan

The Catalyst team opened the floor for feedback and commentary on a draft of the Marketing Plan.

Committee Discussion. Cano said she saw some duplication in the trade shows and consumer shows that VSLOC and San Luis Obispo were doing. Davison clarified that these were all up for consideration. Haugen noted that he would like to see more direct marketing opportunities for lodging partners rather than just for DMOs, and pointed out that the marketing agency for the Morro Bay Tourism Bureau did not see the metrics to convince them to work with Weekend Sherpa. Haugen asked if the goals on leads are from historic goals. Davison responded that VSLOC did not have the budget to attend many of the shows in the past. However, IPW is expected to yield 80 leads alone, and that the goals were conservative.

Public Comment – None.

11c. Landing Page

Bates presented the landing page for the marketing campaign (VisitSLOCounty.com). The goal for this page was to be more inviting than the VisitSanLuisObispoCounty.com site, and drive traffic into the pages of the site. This page is more

engaging, more photo-based and more responsive, as well as more mobile-friendly. Bates noted that, eventually, the page will have three different themes based on the campaigns that VSLOC runs.

Committee Discussion. Sorgenfrei praised the landing page. Haugen asked about updating Morro Bay's profile. Jepsen offered to assist him in logging in to make changes.

Public Comment – None.

11d. Campaign Update

Whitney Bechert from Catalyst Marketing encouraged Marketing Committee members to contact her regarding co-op opportunities. Davison noted that if the interest is not there, funds will be transferred to digital marketing efforts.

Bates offered an update on the shoulder season marketing campaign ads. He noted that static and animated digital ads are complete and have been approved. He also played the first of three radio ads.

Committee Discussion. Sorgenfrei suggested that there were too many co-op options and that Catalyst come up with two or three big co-op opportunities focused again on things that the communities can't do on their own. Catalyst agreed to come back with additional options at the next meeting.

Public Comment – None.

CEO REPORT

12. CEO Report

VSLOC hosted its Industry Educational Seminar on November 4, 2015. Sessions were recorded, and will be posted on the Members Area of VisitSanLuisObispoCounty.com this week.

All communities have remitted TMD funds for August, although Grover Beach, Paso Robles and San Luis Obispo's funds were received late.

Davison also asked the Marketing Committee for their input on future discussion topics.

Committee Discussion – None.

Public Comment – None.

ADJOURNMENT

Meeting adjourned at 12:12pm.



Visit San Luis Obispo County Research Services Request for Proposal

Issue Date: December 9, 2015

Title: Research Services

Issuing Agency: Catalyst Marketing for
Visit San Luis Obispo County
1466 Van Ness
Fresno, CA 93721

Intent to Bid Deadline: **Tuesday, December 15, 2015**

Proposal Deadline: Friday, January 8, 2016 at 3:00 p.m. PST

ALL PROPOSALS MUST BE LABELED: "PROPOSAL – Research Services"

Any questions of clarification on the RFP should be directed to Mark Astone via email by 3:00 p.m. PST on Friday, December 18, 2015. Responses will be shared with bidders on Tuesday, December 22, 2015.

All inquiries for information should be directed to:

Mark Astone, CEO

Email: mastone@teamcatalyst.com

While this project will be contracted directly with Visit San Luis Obispo County, it will be coordinated by the destination's advertising agency, Catalyst Marketing Company. If proposals are mailed, send directly to issuing agency shown above.

Visit San Luis Obispo County Research Services Request for Proposal

1. Purpose

Visit San Luis Obispo County (VSLOC) is seeking the services of a proven market research company to conduct two distinct market research projects to more clearly define existing and potential visitors of the County. Considered firms may bid on one or both assignments of this research study.

Assignment one (1) is to compile a complete and statistically reliable demographic and psychographic profile of current and potential visitors to San Luis Obispo County (SLOC), as well as Share of Wallet research for both SLOC and the cities within SLOC.

Assignment two (2) is to complete a SLOC feeder market Destination Awareness Study to determine the effectiveness of the County's marketing program.

An online survey instrument should be used to allow qualification of potential respondents per the wishes of VSLOC. A comprehensive "screener" (a battery of qualifying questions) should be developed to allow the respondents to self-report their travel behavior, attitudes and desires. Once screened, respondents should then be classified by markers that will identify them as "SLOC experienced visitors," or "SLOC visitor intender" for the purpose of analytical comparison. Supplemental respondent classifications up to 3 additional may be added at no additional cost.

2. Scope of Work

The objectives of this research assignment are to:

2.1. Assignment one: Compile a complete and statistically reliable demographic and psychographic profile of current and like minded visitors to San Luis Obispo County – including city/state of residence, income, age, gender, education, marital status, arrival method (plane, train, automobile), size of traveling party (i.e. couples, families, girls/boys weekend, large group of friends, etc.), frequency of visits, repeat visit(s), lodging type, length of stay, booking window, life stage, lifestyle, words or phrases that describe their feelings about San Luis

Obispo County, etc. and compare this data against the County's named competitive set.

Reveal Share of Wallet information on visitors of San Luis Obispo County – including percentage of total leisure spend in SLO County versus their annual leisure travel budget and where the County ranks against that set.

- Percentage of total leisure travel spend vs. HH income
 - How much does our target audience demo spend on vacations/leisure travel?
- Percentage of total leisure travel spend that occurs in SLO County
 - How much of that is spent in SLO County in the following areas: lodging, food, attractions, entertainment, shopping and wine?
 - How is that spend dispersed geographically in the county by community
- Where the County ranks against the above set of loyalty/affinity feelings

2.2. Assignment two: Complete a feeder market Destination Awareness Study for San Francisco (DMA), Los Angeles (DMA), Central Valley, Phoenix (DMA), San Diego (DMA) and Las Vegas.

- Why do they choose or not choose San Luis Obispo County as a vacation/leisure travel destination?
 - If they choose SLOC what brings them here?
 - What words or phrases do they associate with San Luis Obispo County
 - If they don't choose SLOC then why?
 - Is it a lack of understanding the offerings?
 - Other destinations are closer?
 - Is ease of getting to SLO County a reason? (limited air service)
 - Other destinations offer the same thing?
 - Other destinations offer more luxury resorts?
 - Where are they going instead?
 - What total value experiences influence the decision to visit or not visit San Luis Obispo County?
 - Measure perceptions of SLOC against competing destinations (Santa Barbara, Monterey, Sonoma and Napa)
- What is their general awareness of San Luis Obispo County as a destination?

- What is their awareness of the areas/communities inside the county – Do they know [] Pismo Beach, [] Paso Robles, [] Morro Bay, [] or Hearst Castle, but not realize they are located in SLOC, etc.
 - Positive response to any destination [•] to trigger drop down menu of up to six (6) questions specific to that community.
 - Specify incremental cost (per community) to add this feature, over and above core SLOC research fee.
- What is their awareness of the assets inside the county (Paso Robles Wine Country, Hearst Castle, Morro Rock, Lodging options, Farm-to-table food scene, Craft Brewery movement, Wine region, outdoor activities, etc.)
- How readily can they identify where SLOC is located in California?

3. Proposal Format

3.1. Proposal format is open to presentation style and delivery of the proposing team, but it must include the following information:

- a) Company history and background in tourism research
- b) Case studies (minimum of two) with demonstrated results relevant to VSLOC research assignments
- c) Overview of methodology for delivering the defined Scope of Services and deliverables
 - Please include a projected plan that would be used for this/these study(s), including items such as sample size, data collection technique (i.e. pre-screened participant online survey, focus groups, served universe, and key milestones to complete the assignment(s) on time and on budget.
- d) Illustration of how the company will interact with VSLOC and Catalyst Marketing as part of the planning, implementation and data recap process
- e) Reporting process proposed (include example)
- f) Overview of assigned team that would work with VSLOC and Catalyst

4. Minimum Requirements

Proposals must address each item listed, giving specific details of techniques to be used in achieving these requirements. Proposals may be rejected if minimum requirements are not met. All proposers wishing clarification of this RFP must submit questions in writing to Catalyst Marketing, no later than Friday, December 18, 2015 (due by 3:00 p.m., PST), and sent by email to prrippens@teamcatalyst.com.

Costs for developing proposals are entirely the responsibility of the proposer and shall not be reimbursed by Visit San Luis Obispo County or Catalyst Marketing.

4.1. Notice of Intent to Bid must be received by Tuesday, December 15, 2015 (due by 3:00 p.m. PST). The notice shall be sent by email to prrippens@teamcatalyst.com at the Catalyst Marketing office. The NOTICE OF INTENT TO BID, is nonbinding; however, it ensures the receipt of all addenda related to this RFP. Proposals will be accepted only from applicants who submitted a timely NOTICE OF INTENT TO BID.

4.2. RFP Responses must contain the following information:

- a) Executive Summary
- b) Services and Activities: Provide description of the nature of the organization's services and activities. Note when the business was established, brief history and location. List the location(s) of the office(s) from which the primary work on this contract would be performed.
- c) Note Conflict of Interest: Client relationships that could potentially be considered a conflict of interest must be listed.
- d) Contract Manager/Team: Identify one individual on the proposer's account team who will manage the contract work. Identify the role of each member who will service the account. Current resumes must be attached for each person who would in any way be associated with this account.
- e) References: Provide at least two references.
- f) Budget
- g) Timeline and/or Project Plan

5. Tentative Schedule

This tentative schedule may be altered at any time at the discretion of Visit San Luis Obispo County or Catalyst Marketing. Visit San Luis Obispo County or Catalyst Marketing reserves the right to reject any and all proposals, or any part thereof;

waive an informality in the proposals and accept the proposal that best meets the needs of Visit San Luis Obispo County.

Proposal Released	December 9, 2015
Notice of Intent To Bid Due (due by 3:00 p.m. EST)	December 15, 2015
Written Questions (due by 3:00 p.m. EST)	December 18, 2015
Written Questions Answered and posted to VSLOC Website	December 22, 2015
Proposal Due (due by 3:00 p.m. EST)	January 8, 2016
Proposal Evaluation by scoring committee	January 12, 2016

[Next three items for Interviews/Demos only]

Notification and Scheduling of Finalist Interviews/Demos	January 12, 2016
Finalist Interviews/Demos	January 12, 2016
Interview/Demo Evaluation by scoring committee	January 19, 2016

Notice of Intent to Award Contract and Public Posting	January 20, 2016
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6. Delivery of Proposal

Each bidder is required to deliver four printed and collated copies of its proposal to Catalyst Marketing's office at the address listed below, no later than January 8, 2015 (3:00 p.m. PST). Proposals may be e-mailed to mastone@teamcatalyst.com or sent by courier such as Federal Express, UPS, etc. to:

Catalyst Marketing
C/O RFP Administrator – Visit San Luis Obispo County
1466 Van Ness
Fresno, CA 93721
Phone: 559-252-2500
Email: mastone@teamcatalyst.com

7. Evaluation and Contracting

All proposals satisfying the requirements of this Request for Proposals will be evaluated to establish which of the providers best fulfills the needs of VSLOC and this project. This Request for Proposals in no way commits VSLOC to award a contract, to pay any costs in preparation of a proposal, or to contract for the goods and/or services offered. VSLOC reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with all qualified

providers or to cancel this Request for Proposals. After awarding the contract, the schedule will include a period of collaboration between VSLOC, Catalyst Marketing and the selected Contractor to better define, elaborate upon and fix the Contractor's final Scope of Work and general Terms and Conditions.

PROPOSAL EVALUATION CRITERIA

The evaluation committee will judge each written proposal based on the following criteria:

	MAX. POINTS	SCORE
1. Demonstrated results with relevant scope campaigns	20	
2. Reporting and management capabilities	20	
3. Qualifications of personnel	15	
4. Capabilities of firm/agency	30	
5. Cost effectiveness	15	
TOTAL POINTS	100	