



# AGENDA

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## Visit San Luis Obispo County Marketing Committee

### Visit San Luis Obispo County Marketing Committee Agenda

Tuesday, September 8, 2015

8:30am-10:30am

Courtyard by Marriott

1605 Calle Joaquin, San Luis Obispo, CA 93405

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

<b>ANNOUNCEMENTS</b>	<b>C. Davison</b>
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3. SAVOR the Central Coast Tickets *(5 min)*

<b>CONSENT AGENDA – <i>motion required</i></b>	<b>C. Davison</b>
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4. Approval of August 11, 2015 Marketing Committee Meeting Minutes *(5 min)*

<b>BUSINESS ITEMS</b>	<b>C. Davison</b>
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5. STR Report *(10 min)*
6. WebDAM *(10 min)*
7. Sponsorship – Events *(10 min)*
  - 7a. Cow Parade
  - 7b. Amgen Tour of California – Multi-year partnership

<b>PRESENTATION</b>	<b>M. Astone</b>
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8. Catalyst Marketing *(90 min)*
  - 8a. Media Plan Presentation
  - 8b. Prizm Study Presentation
  - 8c. PR Presentation

ADJOURN.

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

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## Visit San Luis Obispo County Marketing Committee

### Visit San Luis Obispo County Marketing Committee Meeting Minutes

Tuesday, August 11, 2015

8:30am-10:30am

Courtyard by Marriott

1605 Calle Joaquin, San Luis Obispo, CA 93405

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

**PRESENT:** Jim Allen, Ashlee Akers, Terrie Banish, Judith Bean, Molly Cano, Cheryl Cuming, Amanda Diefenderfer, Christen Goldie, Brent Haugen, Heather Muran, Jennifer Porter, John Sorgenfrei

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

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**Call to Order at 8:34am.**

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

None.

#### **ANNOUNCEMENTS**

Davison noted that we are continuing our search for a Marketing Director. The description is posted on the “Jobs” page of VisitSanLuisObispoCounty.com. We appreciate any direction you might be able to provide.

#### **BUSINESS ITEMS**

#### 3. **Website Booking Engine Strategy**

Visit San Luis Obispo County currently uses JackRabbit’s referral system, but is seeking other website booking engine options. The four different options up for discussion are 1) maintaining a referral system like JackRabbit; 2) a custom-built system; 3) an OTA Model (e.g. Booking.com), or to eliminate the booking engine from the website altogether. Jack Rabbit has been ineffective; it doesn’t track reservations, and is a broken model. Creating a custom-built system could be costly and time consuming. Visit San Luis Obispo County’s competitors in Santa Barbara and Monterey are using the OTA model. Davison asked the Marketing Committee for recommendations.

Board Discussion. Diefenderfer pointed out that Paso Robles is not currently using a booking engine because they felt the money could be put to better use in other areas of the budget. Cano commented that building a custom system is not an easy process. Davison noted that there is no “one size fits all” model, and that the same constituents who don’t currently use the current model will likely not use a new model. Muran and Cuming commented that funds would be better spent in other areas of the marketing budget, and Sorgenfrei suggested that a change will upset some people and to hold off.

Public Comment – None.

#### 4. **CRM & Website Strategy**

Visit San Luis Obispo County currently uses a custom Customer Relationship Management (CRM) managed by Kraftwerk, who designed the Visit San Luis Obispo County website. The website is only two years old, but a possible re-skin to the home page is a possibility. Visit San Luis Obispo County is currently in discussions with Simpleview, who manages SEO for the site. Another option is a Sales Force model. The Kraftwerk model is currently a broken model, and Visit San Luis Obispo County is looking to replace it going forward. A local DMO has requested consideration of a countywide CRM for use by other DMOs.

Board Discussion. Haugen commented that it's necessary for DMOs, lodging and restaurants to interact with Visit San Luis Obispo County. The Marketing Committee discussed how there would need to be a balance, where members were given enough space to submit content, but not too much space.

Public Comment – None.

## **5. Research Campaign Strategy**

Visit San Luis Obispo County will be conducting two different studies: 1) Demographic & Share-of-Wallet (Post-Trip) Study and 2) Awareness Study (Southern California/San Francisco Bay Area). For the Demographic & Share-of-Wallet study, Visit San Luis Obispo County would reach out to the lodging community for data, and for the Awareness Study, the organization would be looking at what people are coming or not coming to San Luis Obispo County. One of the purposes of the first study is to be able to market the county to like-minded communities. The timing recommendation for the studies has been moved to the first six months of 2016.

Board Discussion. Porter recommended that the Share-of-Wallet study be conducted in the first quarter and third quarter. Davison responded that once the model was built, it would be easy to duplicate it six months later. Sorgenfrei commented that communities might be looking for co-op opportunities, as this would provide a mutual benefit and create more engagement. Davison noted that part of the challenge in collecting data is San Luis Obispo County's unique lodging mix. Catalyst will be providing more feedback on the facilitation of these studies at the end of the month.

Public Comment – None.

## **6. Countywide Icon Usage**

Visit San Luis Obispo County has had discussions on the use of a countywide icon for use across all DMO channels, connecting communities together through advertising to our customers, and is asking for recommendations of the Marketing Committee. Davison asked if DMO's were even willing to entertain the concept. One idea is a map of California with San Luis Obispo County highlighted in green.

Board Discussion. Committee members agreed that the use of an icon to link the communities was important so that customers could better understand proximity of communities. Cano recommended the use of a line of text, as opposed to a map and Sorgenfrei agreed that a map would be tough to implement. Haugen suggested the use of a hashtag. Davison commented that Visit San Luis Obispo County would be asking Catalyst to produce some options.

Public Comment – None.

## **7. Digital Asset Management (DAM) System**

Visit San Luis Obispo County is currently researching options for a Digital Asset Management (DAM) system. This would be a countywide warehouse of digital assets for requests from media, travel trade, etc, in which each community would upload, control and have access to their own inventory warehouse. Davison asked if this was a concept that the DMO's would be willing to consider, and asked the Marketing Committee as a whole for their recommendations.

Board Discussion. Sorgenfrei commented on the importance of having photo credits on all photos for media use, and on using a system that is easy to both submit and access data. Jepsen noted that the system under consideration allows tagging, which makes it easy to find photos. Davison added that the top 20 photos would be available on the first page, and the rest could be searched easily through this system.

Public Comment – None.

## **8. Visit CA 2016 State Visitor's Guide Co-Op**

Visit San Luis Obispo County has purchased a 2-page spread (valued at \$73,000) in the 2016 California State Visitor's Guide, published by Visit California in partnership with *Sunset*. Visit San Luis Obispo County is buying down the space and offering a co-op to 6 partners at a discounted rate of \$6500/partner (regularly \$9,964). Morro Bay, Pismo Beach, San Luis Obispo, Wine Coast Country, and Ayres are participating. One open space remains.

Board Discussion. Bean announced that the City of Arroyo Grande would like to purchase the last remaining space.

Public Comment – None.

## **PRESENTATION**

### **9. Catalyst Marketing**

Members of the Catalyst Marketing Team introduced themselves to the Marketing Committee (Mark Astone, CEO; Bob Bates, Division President; Vikki Pass, Media Director; Paul Rippens, Director of Client Services; Whitney Bechert, Account Executive; Jeff Hentz, Director of Tourism Strategy & Development). They discussed their 90-Day Timeline, which included work on competitive analysis and stakeholder interviews.

Davison commented that Visit San Luis Obispo County hopes to have a contract with Catalyst finalized soon, and noted that Mark Astone agreed to reduce their agency fee from 13% to 12.5%. Davison also commented on how Catalyst continues to provide added value.

Catalyst discussed their media strategy, which is defined by three objectives: 1) increase awareness of SLO County, 2) drive demand and increase overnight stays, and 3) drive traffic to VisitSanLuisObispoCounty.com. They asked the committee for their insight on primary target audiences for the destination.

Muran responded that it was 35-69 year olds from San Francisco, Los Angeles, the Central Valley, and San Diego. Diefenderfer added that millennials are also a target audience, as SLO County falls into their budget, and that this demographic is always seeking a "different" experience.

Akers added that the "outdoors" lifestyle demographic was also an important one. Haugen suggested looking more at these types of "lifestyle" groups, as Morro Bay has done.

Catalyst discussed the results they found in their research through Scarborough, and identified San Francisco, Los Angeles, and the Central Valley as their three different targets. Catalyst noted that they will use zoning to make sure the budget is spent efficiently, as some areas are more prone to come here than others. They discussed how they would be running television ads one month in the fall, and one month in the spring. As for print, they will be doing everything as co-ops so that they can run a half page ad or larger for maximum impact. Some digital ads will be running year-round, with a smaller budget level in the summer to supplement their campaign. Facebook ads will be hyper-targeted and geotargeted to all five markets, with messaging varying based on the market.

Sorgenfrei suggested looking more at digital print (Los Angeles Times, OC Register, etc). He added that radio is important for the Los Angeles target, and that he would like to see more video ads.

Catalyst discussed the use of a Prizm study to identify demographic and behavior type segments, and how this could be started September 1, 2015. The cost would be \$28,000-\$35,000, and would require buy-in from stakeholders to be effective.

Diefenderfer mentioned that smaller hotels and vacation rentals have difficulty getting this info. Davison commented on Morro Bay's effectiveness in collecting this data, and suggested that this could serve as a model.

Public Comment – Mark Eads of Pismo Beach commented that Pismo Beach lodging community would definitely be interested in participating as it would help them better identify their target.

Davison encouraged members to provide feedback to Catalyst in their meetings with Catalyst.

## **ADJOURNMENT**

**Meeting adjourned at 10:45am.**

<b>TO:</b> <b>Chuck Davison</b> <b>President &amp; CEO</b> <b>Visit San Luis Obispo County</b>	<b>PROPOSAL</b>  <b>DATE: August 28, 2015</b>
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ONE-TIME FEES	COST
<b>Standard Onboarding Package</b> <ul style="list-style-type: none"> <li>• Account Activation and Setup               <ul style="list-style-type: none"> <li>○ Account provisioning</li> <li>○ Access to best practice materials in DAMSuccess</li> </ul> </li> <li>• Customized User Experience               <ul style="list-style-type: none"> <li>○ Custom account configuration (users, groups, permissions, preferences, etc.) according to your specific requirements and workflows</li> </ul> </li> <li>• Customized Onboarding               <ul style="list-style-type: none"> <li>○ Administrator training session</li> <li>○ User training session for contributors or end users</li> <li>○ Metadata strategy consultation session</li> <li>○ Data import of assets, folders, metadata from one hard drive with return shipment including de-duplication, data integrity check and import report identifying critical errors or issues in your data</li> <li>○ User import and mapping to groups</li> </ul> </li> </ul>	\$10,000 one-time fee
<b>TOTAL YEAR ONE:</b>	<b>\$10,000.00</b>
SUBSCRIPTION FEES	COST
<b>WebDAM Professional Edition –</b> <b>10 Power Users, 100 End Users, 500 GB Disk Space</b>	\$1,000/month x 12 = \$12,000 annually
<b>Brand Connect Plus (Professional Edition)</b> <b>Unlimited Asset Publishing, White Labeling, 2 Brand Guidelines with</b> <b>Unlimited Sections and Permissions, 5 Custom Pages</b>	\$8,000/year
<b>Silver Support Plan</b> <ul style="list-style-type: none"> <li>• Product updates and 24 x 7 access to customer knowledge base &amp; community, DAMSuccess</li> <li>• Email and phone support</li> <li>• Web case submission</li> <li>• Standard support hours (8am – 5pm PST)</li> <li>• Access to monthly Administrator web-based training sessions via WebDAM University</li> </ul>	Included
<b>ANNUAL SUBSCRIPTION FEE:</b>	<b>\$20,000.00</b>
<b>SUBTOTAL:</b>	<b>\$30,000.00</b>
<b>IMPLEMENTATION (40% DISCOUNT):</b>	<b>(\$4,000.00)</b>
<b>BRAND CONNECT (50% DISCOUNT):</b>	<b>(\$4,000.00)</b>
<b>TOTAL YEAR ONE:</b>	<b>\$22,000.00</b>

# WebDAM Standard Onboarding Package

This document specifies the Services to be delivered by the WebDAM Client Services team and the process for Standard Onboarding.

## WebDAM and Customer Stakeholders

WebDAM Roles	Role	Description
WebDAM will work with Customer to assist with the delivery of this onboarding.	Project Manager	The PM will be your day-to-day contact during the onboarding process. They are responsible for overall project management and delivery or all aspects of the onboarding.
	Solution Engineer	A technical expert on the WebDAM platform and API, the Solution Engineer is responsible for all technical aspects of the onboarding such as data imports, mapping, integrations and etc.
	Customer Success Manager	The CSM is your primary account contact and customer advocate at WebDAM. They are responsible for the customer's overall success with WebDAM.

Customer Roles	Role	Description
To ensure success, participation of Customer resources is required during this effort. Depending on the scale of onboarding, every role may not be required or a stakeholder may play several roles.	Executive Sponsor	The executive responsible for the overall vision and success of the project. Can be an escalation point for the project team if necessary.
	Project Manager	A senior level manager that will work with the WebDAM team to facilitate exchange of information, and track the progress of the onboarding.
	Contributors and Curators	Contributors will be responsible for uploading assets to WebDAM on an ongoing basis and adding the appropriate metadata. The Curator is responsible for defining a metadata schema, controlled vocabulary and folder structure.
	Technical Lead	Technical resource that can assist with data collection, authentication integration, domain setup, HTML template customization and any other integration requirements.
	WebDAM Administrator	The person that will be responsible for WebDAM administration and ongoing management of the WebDAM account including user management, roles and permissions and asset management.

## Scope for Standard Onboarding Package

- Account Activation and Setup
  - Account provisioning
  - Access to best practice materials in DAMSuccess

- Customized User Experience
  - Custom account configuration (users, groups, permissions, preferences, etc.) according to your specific requirements and workflows
- Customized Onboarding
  - Administrator training session
  - User training session for contributors or end users
  - Metadata strategy consultation session
  - Data import of assets, folders, metadata from one hard drive with return shipment including de-duplication, data integrity check and import report identifying critical errors or issues in your data
  - User import and mapping to groups

## Timeline, Key Steps and Deliverables

Below is a chart summarizing the typical phases of the onboarding. Please note that the timeline has dependencies on key Customer tasks.

Phase	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Account Activation and Setup								
Account Configuration								
Data Import								
Trainings and Consultation								
Acceptance and Signoff								

The steps below outline the typical steps for a standard onboarding within the phases identified above. WebDAM deliverables are identified by a “check”. Customer dependencies are italicized.

### Account Activation and Setup (Day 1)

- ✓ WebDAM provisions the Customer’s account and sends the following details:
  - Account login, API and FTP credentials to WebDAM [Subscription Edition] account with [X Power Users, X End Users and X GB of Disk Space]
  - Access to DAMSuccess, a customer knowledge base & user community
  - Email / phone support contact information and web case URL
  - Any additional add-ons purchased by the customer

### Project Kickoff and Account Configuration (Week 1-2)

- ✓ WebDAM conducts a kick-off meeting with Customer stakeholders to discuss the onboarding process, roles and responsibilities, project scope, timeline and success criteria
- ✓ WebDAM CSM provides the customer an account configuration form to identify key system preferences

- *Customer provides account configuration form back to WebDAM CSM*
- ✓ WebDAM configures the customer's account per their preferences
- ✓ WebDAM schedules a "Getting Started" training session with the WebDAM Administrator and provides web conferencing link
- ✓ WebDAM conducts the Administrator training session and goes over all system preferences and administrative functions in the WebDAM application

### Data and User Import (Week 2 - 6)

- *Customer provides a hard drive that includes assets to be imported and a metadata mapping file, if required*
- ✓ WebDAM imports all of the assets, folders, metadata supplied by the customer
- ✓ If requested by the customer, WebDAM de-duplicates the assets
- ✓ WebDAM completes the import and supplies a detailed import report identifying any critical errors or issues in the asset data
  - *Note: from the time WebDAM receives the hard drive, import typically takes up to 10 business days. Large data volumes may require additional time.*
- ✓ WebDAM returns hard drive to the customer
- *Customer delivers spreadsheet mapping users to groups to the WebDAM according to standard user and group template in DAMSuccess*
- ✓ WebDAM imports and maps users to groups and completes the permission setup
- *Customer reviews the imported data within their WebDAM account and relays issues to WebDAM, if any*

### Training and Consultation (Week 4 - 6)

- ✓ WebDAM schedules a Metadata Strategy Session with the customer and provides worksheets to customer in preparation of the session
- *Customer fills out worksheets as appropriate*
- ✓ WebDAM conducts a Metadata Strategy Consultation session with the Customer's curators and administrators
- ✓ WebDAM delivers an End Users Training to go over typical workflows for the customer's users who will typically view and download assets from WebDAM
- ✓ WebDAM completes all deliverables

## Acceptance and Signoff (Week 7 - 8)

- *Customer provides written acceptance that onboarding is complete to WebDAM within 10 business days*



## VISIT SAN LUIS OBISPO COUNTY

### CowParade SLO 2016 Sponsorship

#### Visit San Luis Obispo County Benefits:

- Visit San Luis Obispo County will be named **Official Tourism Partner**. Marketing, promotional materials, and opportunities include the following:
  - ◆ **Visit San Luis Obispo County logo and URL will be placed on the plaques** of all Cows on display along with the names of the title sponsor, cow sponsor, artist, and charity. It is estimated that this dominant presence will provide brand exposure to an audience in excess of 625,000 consumers viewing Cows around the county.
  - ◆ **Visit San Luis Obispo County logo prominently displayed on the home page of the CowParade SLO web site**, with **link to a promotional video** provided by Visit San Luis Obispo County.
  - ◆ **CowParade SLO souvenir brochure and map will be provided courtesy of Visit San Luis Obispo County**. CowParade SLO will produce, print and distribute the souvenir brochure and map. Visit San Luis Obispo County will have the opportunity to include visuals and content, including: Intro, About SLO County; History, etc. Visit SLO County logo and URL will be included. Copies will be printed and distributed statewide.
  - ◆ **Visit San Luis Obispo County will be provided a landing page on the CowParade SLO web site** with hot link to the Visit San Luis Obispo County web site.
  - ◆ **The digital and interactive map will be provided courtesy of Visit San Luis Obispo County**. The logo and URL will be included.
  - ◆ **Press materials and press releases** will all reference Visit San Luis Obispo County. The URL will be included.
  - ◆ **Visit San Luis Obispo County logo prominently displayed on promotional materials** such as: commercials and in-room Visitor TV promotions; print and digital advertising; 5,000 promotional posters, 50K rack cards, and more.
  - ◆ Recognition in **Gala Auction brochures** with opportunity to provide welcome letter from Visit San Luis Obispo County.
  - ◆ Opportunity to participate in **CowParade SLO press events**.

- ◆ **Trademark recognition in all e-blasts** and electronic promotions related to CowParade SLO, including the CowParade official newsletter to 50K subscribers world-wide.
- ◆ **Hospitality packaging**, including:
  - ◆ Twenty (20) VIP Tickets to the Sponsor & Artist Reception
  - ◆ Twenty (20) VIP Tickets to the Round-up & Launch of CowParade SLO
  - ◆ Twenty (20) VIP Tickets to Private Reception preceding CowParade Auction
  - ◆ Twenty (20) VIP Tickets to CowParade Auction (\$125 value each)

**Marketing and Promotions:**

CowParade SLO has made 101 Cows their goals. When that goal is met, the marketing and promotions budget will exceed \$300K. The bulk of the marketing budget will be focused on digital advertising to select drive-to and fly-in markets. This will be paired with strong media outreach for editorial coverage. Additionally, social media tactics include equipping all sponsors, artists, charities, local DMOs and media partners with a media tool kit to promote CowParade SLO and SLO County from January to September, 2016.

**Consideration:**

\$20,000 cash and \$30,000 hard cost exposure value to include:

- ◆ Landing page on the Visit SLO County web site, January through September 2016. “The CowParade SLO is Coming” or “Make Plans to Attend CowParade SLO” message could also be provided in advance of January based on availability of CowParade SLO materials. CowParade SLO to provide all artwork.
- ◆ Banner ad on the Visit SLO County web site, January through September 2016. Opportunity for additional tile ads throughout site based on availability. CowParade SLO to provide all artwork.
- ◆ Listing on the Event Page of the Visit SLO County website
- ◆ Members profile on the Visit SLO County website
- ◆ (2) Newsletter distributions. The first to announce the launch of the CowParade and the second to announce the Auction & Gala.
- ◆ Inclusion in Visit San Luis Obispo County’s “This Week in SLO County” weekly email distribution based on availability
- ◆ Inclusion of the CowParade SLO in out-of-area marketing based on availability and campaign materials.
- ◆ Ability to promote CowParade SLO in the Artist Village at Sunset SAVOR 2015

**Payment to:**

CowParade SLO

4349 Old Santa Fe Rd, #7, San Luis Obispo, CA 93401

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Tom Halen  
CowParade SLO

Date

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Chuck Davison  
Visit San Luis Obispo County

Date



As Catalyst Marketing prepares to launch comprehensive and vertically integrated marketing campaign(s) for the new San Luis Obispo County TMD, research and visitor data is always a critical element in preparing to target visitor segments. At the Marketing Committee meeting on August 11<sup>th</sup>, it was recommended by Catalyst to conduct a Visitor Study that would provide visitor profile intelligence of current SLO County visitors and help focus future tourism marketing efforts. The study we will coordinate and conduct is called a Nielsen PRIZM study that uses the A.C. Nielsen platform and blends market data with demographics, syndicated survey data and survey market research. Please reference "Option A Report Example" in your Prizm folder for an example of what this report might look like. While your report will not be the same, this example will paint a picture of how the findings will be presented and the type of valuable info you will gain.

### **What Is The Nielsen PRIZM Study?**

The PRIZM Study will allow us to identify, understand and reach our customers and prospects. PRIZM defines every U.S. household in terms of 66 demographically and behaviorally distinct types, or "segments," to help marketers discern those consumers' likes, dislikes, lifestyles and purchase behaviors. Used by thousands of marketers within Fortune 500 companies, PRIZM provides the "common language" for marketing in an increasingly diverse and complex American marketplace. For a reference to the 66 segments, please see the first page of the appendix. Here the segments are named and by reading further you will find examples of these segment's profile information. For an extensive report of these groups and a very deep dive into who they consist of, please see the document in your Prizm folder titled, "Prizm\_Code\_Profiles."

PRIZM enables marketers to create a complete portrait of their customers by answering these important questions:

- Who are my customers?
- What are my customers like?
- Where can I find more of these type customers?
- How can I reach more of these customers?

## Features & Benefits

With PRIZM we will better understand our customers and prospects, and reach them with tailored messages and products designed just for them. Captured by catchy nicknames, images and behavioral snapshots that bring the segment to life for us to understand, PRIZM segments are memorable and summarize complex consumer profiles in a way that is intuitive and easy to communicate. For example, slides 11-13 in the Daytona example in your folder outline their specific memorable names that summarize the complex profiles of consumers specific to their visitor research.

PRIZM's 66 segments are numbered according to socioeconomic rank (which takes into account characteristics such as income, education, occupation and home value) and are grouped into (11) Life Stage Groups, and (14) Social Groups. PRIZM Social Groups are based on urbanization and socioeconomic rank. PRIZM Life Stage Groups are based on age, socioeconomic rank and the presence of children at home. For a list of the 11 Life Stage Groups and the 14 Social groups, please reference pages 10-11 below in the appendix.

PRIZM can provide company-wide integration of a single customer concept because it can be coded onto nearly any piece of customer data and is available on a wide network of leading survey, panel, marketing measurement and list databases in the U.S. It also provides excellent consumer analysis, implementation and measurement. Beyond coding records for consumer focused applications, PRIZM provides demand estimates of any market or trade area definition for location analytics and profile databases of behaviors including leisure time preferences like shopping, dining, favorite magazines, web preferences, blog sites and TV shows. With these valuable insights from PRIZM, we can craft advertising messaging to reach consumers based on virtually any purchase and media behavior.

## How It Works

We will need to collect "sample" confidential guest data from all participating lodging, campsite, RV Park and other TMD contributing partners. The Guest data that is provided will only be used in this specific PRIZM research project to pinpoint current and potential future markets for tourism focus. This data will be supplemented with Census and lifestyle variables through PRIZM, and then analyzed to provide insight into our tourism market. Catalyst Marketing will provide a non-disclosure agreement for all participating SLO County partners.

We will work with VSLOC CEO and the Marketing Committee in defining the date, & season parameters of the data submission as part of the study. Ideally, we would want to include all months of a calendar year, but exclude special event periods that could skew the data results. The format would look as follows:

Guest street address	Excel spreadsheet or other data file
Guest street address	
City	
State	
Zip (zip-plus-four is best, if available)	
Check-in Date (TBD)	
Check-Out Date (TBD)	

Once the data collection is complete and submitted, it would take approximately 60-90 days to finish the study and provide the results that we would present in a public forum and make available for all participants to review and use for years to come. The data results are presented in an aggregate format and will highlight the general Visitor type results, and also Visitor type by specific seasons and month.

We would ideally like to launch this study as quickly as possible and have results by the end of the year or by early January for utilization in our 2016 marketing campaigns.

**Data Collection Responsibility**

Catalyst will oversee the entire project from start to finish. This will include complete communication and coordination with all SLO County lodging participants, VSLOC tourism officials and the other Tourism Bureaus within the County. We will oversee the layout and structure of the Study, data collection of targeted arrival periods, in-market meetings as necessary to communicate/clarify study, preparation of data for study and design communication reports of results of the study including in-market presentations to key tourism stakeholders. Catalyst will communicate directly and in cooperation with VSLOC staff to all SLO County lodging participants.

**Size Sample Management**

Catalyst will conduct and manage the collection of data entries and ensure a balanced collection of entries will be collected from 1) entire geographic region of SLO County; 2) all lodging types within County; 3) proper balance by season

The proper and adequate “sample size” of data entries required is between 15,000 to 20,000 data entries for this study. Catalyst will provide the oversight and management of this process. NOTE it will be paramount that we collect a minimum of 15,000 entries to ensure an accurate study.

**PRIZM Cost Study**

**The overall cost for this study to be managed and facilitated by Catalyst is \$34,500**, which includes a PRIZM study for up to 20,000 entries, and all project management related activities conducted by Catalyst. This includes coordination of all communication, data collection and preparation and communication of the results.

## **Optional Individual Hotel/Lodging Partner PRIZM Analysis Cost**

While the results of the data will be a collective analysis and presented in a general aggregate summary, we have confirmed with the Vendor (Polaris Research) that we can offer any and all participating PRIZM Study SLO County lodging partners the ability to receive their own data analysis of entries provided for the study. The cost breakdown is as follows and examples are attached: (Note all prices are NET @ cost)

### **Option A**

Individual hotels/lodging partners - FULL PRIZM report study (minimum 500 entries) - \$2500

### **Option B**

Individual Hotel /lodging partners - One-page Dashboard report analysis (500 minimum entries)  
- \$900

## **Appendix:**

### **PRIZM® Segmentation – Profiling Your Best Customers**

To create more effective and efficient market planning, media strategy, customer acquisition, and cross-selling and retention programs, marketers must first be able to identify and understand their most profitable customers.

Segmentation links your customer data with household-level and neighborhood-level demographics, syndicated survey and primary research data to reveal exactly what types of consumers are currently using your products or services. Any customer files, lists or survey data with complete addresses or at least a ZIP Code can be coded with Nielsen's segmentation systems. This allows you to identify your best prospect segments with the greatest efficiency for effective marketing strategies that align with marketplace demands.

PRIZM defines every U.S. household in terms of 66 demographically and behaviorally distinct types, or "segments," to help marketers discern those consumers' likes, dislikes, lifestyles and purchase behaviors.

► 66 PRIZM® Segments

Code	Segment Nickname	Demographic Descriptor	Code	Segment Nickname	Demographic Descriptor
01	Upper Crust	Wealthy Older w/o Kids	34	White Picket Fences	Upper-Mid Younger w/ Kids
02	Blue Blood Estates	Wealthy Older w/ Kids	35	Boomtown Singles	Lower-Mid Middle Age w/o Kids
03	Movers & Shakers	Wealthy Middle Age w/o Kids	36	Blue-Chip Blues	Midscale Younger w/ Kids
04	Young Digerati	Wealthy Younger Family Mix	37	Mayberry-ville	Upper-Mid Older w/o Kids
05	Country Squires	Upscale Middle Age w/ Kids	38	Simple Pleasures	Lower-Mid Mature w/o Kids
06	Winner's Circle	Wealthy Middle Age w/ Kids	39	Domestic Duos	Midscale Mature w/o Kids
07	Money & Brains	Wealthy Older Family Mix	40	Close-In Couples	Lower-Mid Older Mostly w/o Kids
08	Executive Suites	Upper-Mid Middle Age w/o Kids	41	Sunset City Blues	Lower-Mid Older Mostly w/o Kids
09	Big Fish, Small Pond	Upscale Older w/o Kids	42	Red, White & Blues	Lower-Mid Older w/o Kids
10	Second City Elite	Upscale Older w/o Kids	43	Heartlanders	Lower-Mid Older Mostly w/o Kids
11	God's Country	Upscale Older w/o Kids	44	New Beginnings	Downscale Middle Age Family Mix
12	Brite Lites, Li'l City	Upscale Middle Age w/o Kids	45	Blue Highways	Lower-Mid Older w/o Kids
13	Upward Bound	Upscale Middle Age w/ Kids	46	Old Glories	Downscale Mature w/o Kids
14	New Empty Nests	Upper-Mid Mature w/o Kids	47	City Startups	Low Income Younger w/o Kids
15	Pools & Patios	Upper-Mid OlderHH w/o Kids	48	Young & Rustic	Lower-Mid Middle Age w/o Kids
16	Bohemian Mix	Upper-Mid Middle Age Family Mix	49	American Classics	Downscale Mature w/o Kids
17	Beltway Boomers	Upper-Mid Older w/ Kids	50	Kid Country, USA	Lower-Mid Younger w/ Kids
18	Kids & Cul-de-Sacs	Upper-Mid Younger w/ Kids	51	Shotguns & Pickups	Lower-Mid Younger w/ Kids
19	Home Sweet Home	Upper-Mid Middle Age w/o Kids	52	Suburban Pioneers	Downscale Middle Age Family Mix
20	Fast-Track Families	Upscale Middle Age w/ Kids	53	Mobility Blues	Low Income Middle Age w/o Kids
21	Gray Power	Midscale Mature w/o Kids	54	Multi-Culti Mosaic	Lower-Mid Middle Age Family Mix
22	Young Influentials	Midscale Middle Age w/o Kids	55	Golden Ponds	Downscale Mature w/o Kids
23	Greenbelt Sports	Upper-Mid Older w/o Kids	56	Crossroads Villagers	Downscale Older w/o Kids
24	Up-and-Comers	Upper-Mid Younger w/o Kids	57	Old Milltowns	Downscale Mature Mostly w/o Kids
25	Country Casuals	Upscale Older w/o Kids	58	Back Country Folks	Downscale Mature Mostly w/o Kids
26	The Cosmopolitans	Upper-Mid Older Mostly w/o Kids	59	Urban Elders	Downscale Older Mostly w/o Kids
27	Middleburg Managers	Upper-Mid Older w/o Kids	60	Park Bench Seniors	Downscale Older Mostly w/o Kids
28	Traditional Times	Upper-Mid Older w/o Kids	61	City Roots	Downscale Mature Mostly w/o Kids
29	American Dreams	Upper-Mid Middle Age Family Mix	62	Hometown Retired	Downscale Mature Mostly w/o Kids
30	Suburban Sprawl	Midscale Older w/o Kids	63	Family Thrifts	Lower-Mid Younger w/ Kids
31	Urban Achievers	Lower-Mid Younger Mostly w/o Kids	64	Bedrock America	Downscale Middle Age w/ Kids
32	New Homesteaders	Upper-Mid Younger w/ Kids	65	Big City Blues	Lower-Mid Middle Age Family Mix
33	Big Sky Families	Upper-Mid Middle Age w/ Kids	66	Low-Rise Living	Lower-Mid Middle Age Mostly w/ Kids

## Examples of PRIZM Segment profile information:

<b>01 Technovators</b> Wealthy Younger w/ Kids 	<b>02 Plugged-In Families</b> Upscale Younger w/ Kids 	<b>03 Tech Nests</b> Upper Mid Younger w/ Kids 
<b>04 Connected Country</b> Upscale Middle Age w/ Kids 	<b>05 You &amp; iTunes</b> Upper Mid Younger w/o Kids 	<b>06 High-Tech Society</b> Wealthy Older w/ Kids 
<b>07 Generation WiFi</b> Upper Mid Younger w/o Kids 	<b>08 Calling Circles</b> Midscale Younger w/ Kids 	<b>09 Dish Country</b> Midscale Younger w/ Kids 
<b>10 Smart Gamers</b> Wealthy Older w/ Kids 	<b>11 WiFi Warriors</b> Wealthy Middle Age w/o Kids 	<b>12 Satellites &amp; Silos</b> Upper Mid Middle Age w/o Kids 



### 11 - WiFi Warriors

**Wealthy Middle Age w/o Kids**

WiFi Warriors is a segment of wealthy management who rely on technology for their travel-intensive jobs. They rank at the top for carrying multiple laptops and cell phones, with some paid for by their employers. They own all the equipment necessary for a well-furnished home office: laser printer, fax machine, and router for wireless Internet access. These middle-aged couples have a fondness for decorating their suburban and town homes with an assortment of PCs, TVs—including flat-panel sets—and gadgets like digital cameras. Fans of traditional media, they like magazines and TV programs that cover skiing, boating, and business. But they're also heavy users of the Internet and typically go online to work on office projects, book travel arrangements, research car and real estate purchases, and trade stocks. WiFi Warriors score high for changing service providers when they gain the time-saving convenience of a bundled plan.

**Lifestage Group:** 07 - Wireless White-Collars

**Demographics Traits**

- Urbanicity: Metro Mix
- Income: Wealthy
- Technodoption Class: High-Tech
- Age Ranges: <55
- Presence of Kids: HH w/o Kids
- Homeownership: Mostly Owners
- Employment Levels: Management
- Education Levels: Graduate Plus
- Ethnic Diversity: White, Asian, Hispanic, Mix

**Lifestyle & Media Traits**

- Use netbook to access Wi-Fi
- Fiber optic TV
- Visit LinkedIn.com
- Play tennis
- Read Runner's World





**All PRIZM segments are divided among:**

**A. 10 Lifestage Groups**

– based on Affluence + Householder Age + Household Composition

LIFESTAGE GROUPS	
1) Young & Wireless	6) Frugal Folks
2) Emerging Techies	7) Wireless White-Collars
3) Young Startups	8) Mature Mid-Techs
4) Early-Adopting Elite	9) Offline Seniors
5) Suburban Spenders	10) Elderly Traditionalists

**B. 14 Social Groups**

– based on Affluence + Urbanization Category

SOCIAL GROUPS	
1) Urban Uptown	8) Second City Society
2) Midtown Mix	9) City Centers
3) Urban Cores	10) Micro-City Blues
4) Elite Suburbs	11) Landed Gentry
5) The Affluentials	12) Country Comfort
6) Middleburbs	13) Middle America
7) Inner Suburbs	14) Rustic Living

**C. Demographic Traits for PRIZM segments include:**

- Urbanization Class ((Urban, Suburban, Second City, Town & Rural)
- Age
- Race & Ethnicity
- Language
- Home Value
- Employment Type
- # People in Household
- Marital Status
- Income
- Education
- Home Ownership
- Length at Residence
- Employment by Occupation
- # Children in Household

#### **D. Purchasing & Media Behavior**

PRIZM provides demand estimates of any market or trade area definition for location analytics and profile databases of behaviors including leisure time preferences like shopping, dining, favorite magazines and TV shows. With these valuable insights from PRIZM, marketers can craft advertising messaging to reach consumers based on virtually any purchase and media behavior.

##### **Purchase Behavior:**

- Apparel
- Appliances
- Automotive
- Communications
- Consumer Package Goods
- Financial Services
- Home Furnishings
- Media Usage
- Travel

##### **Media Behavior:**

- Television
- Cable
- Internet
- Radio
- Newspapers
- Magazines

## Nielsen PRIZM Social Groups

The 14 Social Groups of PRIZM® are based on Nielsen Urbanization class and affluence, two important variables used in the creation of PRIZM. First, segments are placed in one of four urbanization class categories - Urban, Suburban, Second City or Town & Rural. Within each of these categories, all the segments are then sorted into groups based on affluence, another powerful demographic predictor of consumer behavior.

All of the 66 segments are grouped into one of these 14 Social Groups. At the top of both the affluence and density scales is Social Group U1 Urban Uptown, in which residents live in urban areas and are very affluent. At the opposite extreme is Social Group T4 Rustic Living, in which residents live in rural, low density housing areas with relatively low affluence lifestyles.



## Nielsen PRIZM Lifestage Groups

PRIZM® Lifestage classifications provide a different way to look at groups of PRIZM segments. While PRIZM Social Groups are based on both affluence and Nielsen Urbanization, PRIZM Lifestage Groups account for **affluence** and a combination of **householder age** and **household composition**.

Within three Lifestage classes — Younger Years, Family Life, and Mature Years — the 66 segments are further grouped into 11 Lifestage Groups. Each Lifestage Group’s combination of the three variables — affluence, householder age, and presence of children at home — help paint a more vivid picture of the likely lifestyle of the segments in that group. For example, the three Lifestage Groups that comprise the class Younger Years share the characteristic that the majority of households are young and childless.



# PUBLIC RELATIONS PLAN

Prepared for Visit San Luis Obispo County

## OVERALL STRATEGY AND GOALS

San Luis Obispo County (SLOC) boasts a wide variety of year-round activities, attractions and things to do. It's a destination like no other, providing access to gorgeous beaches, scenic wine country and stunning geography, not to mention fantastic dining options, terrific sight-seeing, fun events and shopping. Put simply, SLOC offers something for everyone.

It's this impressive breadth of attributes that a public relations program should be built upon. The ideal PR campaign will increase awareness for SLOC at regional, state and national levels with emphasis on the area's vast activities and appeal, utilizing a comprehensive media relations program with a consistent flow of press releases designed to inform and educate, combined with targeted media engagement – all of which will generate far-reaching coverage across a variety of media outlets.

The following guidelines are presented to accomplish this:

- Promote SLOC as the ideal year-round destination for a variety of audiences including, but not limited to:
  - Families
  - Sports/outdoor enthusiasts
  - Food/wine enthusiasts
  - Couples/empty-nesters
  - LGBT
- Showcase the wide range of attractions and activities in and around SLOC in new and interesting ways:
  - Highlight unique local personalities and businesses through media interviews and social media (craft/micro breweries, restaurants, hotels/motels, etc.)
  - Spotlight focus on the area's main attractions as well as some of the area's lesser-known activities to drive interest among targeted media (i.e. wine, hiking, running, cycling, etc.)
  - Develop specialized travel itineraries that appeal to specific audiences designed to drive interest among identified media segments
- Establish/increase meaningful partnerships that complement visitation to SLOC and media coverage of the destination.

## MEDIA STRATEGY, TACTICS AND DELIVERABLES

We will utilize a comprehensive approach to get stories placed and raise awareness for San Luis Obispo County.

**Editorial Calendars** – Research, develop and maintain a master media list from which we'll monitor editorial calendars in an attempt to ensure that SLOC is not left out of any relevant planned stories.

**Press Kit** – Catalyst will develop, and keep updated, a press kit for VSLOC. The media kit will be a soft copy from which hard copies can be printed as needed (i.e. - for events, meetings, etc.). Otherwise, the media typically prefer electronic copies.

**Media Monitoring/Measurement** – Catalyst will monitor the editorial content of media sources on a continuing basis as a tool to identify mentions of specific references related to San Luis Obispo County (i.e. – names/brands associated in promoting the destination such as cities, specific businesses, key individuals/spokespeople, targeted events, attractions, etc.), track the success of news releases, benchmark performance, manage brand reputation, gather industry intelligence, and identify new opportunities. We use both our subscription to NUVI, Meltwater News, as well as Google New Alerts to create an online profile that includes search terms and keywords, media to be monitored, and type of articles and/or mentions to be delivered. Results are delivered daily to Catalyst, and can be forwarded to VSLOC preference depending on relevance and urgency.

Catalyst measures and reports media results in three ways:

- **Mentions** - a number that showcases how many times VSLOC has been mentioned in a given time period, and useful for figuring out that your PR is working
- **Audiences** - one of the most reliable audience measures is website traffic, which provides a sense for how many people are finding VSLOC by any means online.
- **Impressions** – also known as circulation, or the total number of readers/listeners/viewers from any given coverage resulting from PR

**Press Releases** – We will develop a news pipeline of press releases to be distributed throughout the year – always distributed directly to media by Catalyst, and in some cases where the news value of the press is greater, through a newswire service such as Business Wire, PR Newswire or PR Web (additional costs would apply). The list may consist of seasonal occurrences and other news and information of interest to visitors and media alike. Catalyst would schedule a discovery session to explore and calendar news announcements as far in advance as possible. While some press releases might be designed to address unplanned occurrences (e.g – wildfires, flooding, etc.), planned press release themes throughout the year could include:

- **January/February** – Restaurant Month/Winter Getaways, Valentine’s/Romantic Getaway(featured hotel/activity packages)
- **March/April** - Easter Events/Spring Getaway (featured events, activities and hotel packages)
- **May/June** – Planning the Perfect Family Vacation (beaches, biking, hiking and other family activities); What’s New in SLOC (wineries, breweries, other businesses, etc.)
- **July/August** – Sunset SAVOR The Central Coast
- **September/October** -- Hidden Secrets of the Central Coast Wine Country (highlight seasonal events/wineries surrounding harvest/crush)
- **November/December** -- Holiday Magic in San Luis Obispo County

Press Release Deliverables:

- 1 per month average

**Story Angles** – Develop creative story ideas that can either be crafted into compelling releases, or pitched by phone/e-mail to targeted media to entice them to visit the destination and/or write a story. We will work on an existing calendar to develop and pitch stories, but will always be looking to tie into current trends. We track media leads on HARO and will be actively pitching stories.

Deliverables:

- 6-8 “stories” that could be developed into press releases, pitches, etc. - stories would cover a variety of angles appealing to different interests
- 2-3 national stories (*Conde Nast Traveler, USA Today, etc.*) per quarter
- 1-2 regional stories (*Los Angeles Magazine, Los Angeles Times, San Francisco Chronicle, 7X7, etc.*) per quarter

**Media Familiarization Trips** – One of the best ways to influence coverage for SLOC is to have media come out and experience the area firsthand to experience a range of activities, accommodations and attractions relevant to their readership. We would identify and qualify media to visit the destination, either individually or as a group, and develop an itinerary designed to expose them to local attractions and accommodations consistent with their stated interests.

Deliverables:

- 2-4 individual media visits per quarter; or
- 6-8 media per organized group visit

**Desk-side Briefings** – Another way of exposing SLOC to travel writers is to take the show to them – especially if they’re not willing or able to travel to the area. Whether leveraging planned travel or as a stand-alone event, we would book meetings with targeted travel writers in specific markets, allowing the opportunity for some quality time with those in a position to write about SLOC.

Deliverables:

- 1-2 per market at no additional cost

**Tourism Forum** – Today’s travel media face a dilemma: they do not have budgets to travel to destinations, and their editorial guidelines prohibit them from accepting paid travel. One exception allows travel writers to participate in events as speakers and/or panelists, in which they can accept paid travel as part of the event. To attract national tier-one travel writers to SLOC, most of who reside in New York (*Travel + Leisure, Conde Nast, etc.*), we propose sponsoring a travel forum. The event would be open to a broad range of people in the travel/tourism industry, and could generate revenue in the form of registration fees and sponsorships. Most importantly, we would have a captive audience of travel writers staying in and experiencing the destination.

**Reporting** – Catalyst will track all activity and results, which will be delivered at the end of every month. The report will include details on specific media outreach efforts accompanied by a status and next steps. Media results will include publication name, article details along with a web link if available and a hard copy.

## **MEDIA TARGETS**

The following is meant to be a partial list of media categories with examples of outlets in each. A complete media list would be developed and maintained on an ongoing basis.

**Regional Newspapers** – *Fresno Bee, Bakersfield Californian, Los Angeles Times, Orange County Register, Sacramento Bee, San Diego Union Tribune, San Francisco Chronicle, Las Vegas Review, Arizona Republic, Las Vegas Review Journal, Arizona Republic, and localized regional papers, etc.*

**Regional Publications**–, *Life After 50 Magazine, VIA/Westways, Sunset, Camp California, Bon Appetit, Food & Wine, Touring and Tasting, US Airways, RV Life – RV Parks, Vacation Rental Magazine – Vacation Rentals, etc.*

**City Publications** -- *LA Magazine, OC Magazine, SF Magazine, San Diego Magazine, 7X7 Magazine, Las Vegas Magazine, Phoenix Magazine, etc.*

**National Magazines** – *Arthur Frommer’s Budget Travel Magazine, Conde Nast, Travel + Leisure, Sherman’s Travel, Food & Wine, etc.*

**Special Interest Magazines** – *Backpacker, Field and Stream, Outside Magazine, Men’s Health, etc.*

**Television** – *Bay Area Backroads, Good Day LA, Peter Greenberg, and regional television affiliates in the Los Angeles, Sacramento, San Diego and Bay Area markets.*

**Blogs** – *Adventure Journal, Inga’s Adventure, Johnny Jet, Local Getaways, The Expeditioner, Gutsy Traveler, Travel Mole, and many more.*

## **PROPOSED COST**

**\$5,000 per month**