



AGENDA

Visit SLO CAL Marketing Committee

Visit SLO CAL Marketing Committee Meeting

Friday, May 11, 2018

8:30 am - 10:30 am

Hampton Inn, San Luis Obispo

1530 Calle Joaquin, San Luis Obispo, CA 93405

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

ANNOUNCEMENTS	B. Burnham
---------------	------------

CONSENT AGENDA – <i>motion required</i>	B. Burnham
---	------------

3. Approval of April 10, 2018 Marketing Committee Minutes
Staff will ask for Committee approval of the April 2018 Marketing Committee Minutes.

BUSINESS ITEMS	B. Burnham
----------------	------------

4. Advertising & Marketing Update (30 min)
Staff will review the progress on current sales efforts, the paid media campaign, earned (PR) efforts and owned media efforts.
5. Marketing Plan (30 min) – *motion required*
The Committee will review the FY 2018/19 Marketing Plan draft and vote on a recommendation for BOD approval.
6. Miles Media (30 min) – *motion required*
The Committee will review the Miles Media proposal and vote on a recommendation for BOD approval.
7. Marketing Discussions (15 min)
 - a. Reporting Deep-Dive
Staff will review and Committee will discuss PR Trendkite reporting.

ADJOURN

Brown Act Notice: Each speaker is limited to 2 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 Marketing Committee to discuss or take action on issues not on the agenda, except that members of the Committee may briefly respond to statements made or questions posed by the person giving public comment. Staff may be directed by the Committee to follow-up on such items and/or place them on the next Committee agenda. The order of agenda items is listed for reference and items may be taken in any order deemed appropriate by the Marketing Committee.

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 SLO CAL Marketing Committee

Visit SLO CAL Marketing Committee Meeting Minutes

Tuesday, April 10, 2018

8:30 am

Hampton Inn, San Luis Obispo
1530 Calle Joaquin, San Luis Obispo, CA 93405

1. **CALL TO ORDER:** Brooke Burnham

PRESENT: Ashlee Akers, Jim Allen, Audrey Arellano, Terrie Banish, Jocelyn Brennan, Molly Cano, Cheryl Cuming, Christen Goldie, Jennifer Little, Courtney Meznarich, Heather Muran, Jennifer Porter, John Sorgenfrei, Danna Stroud, Jill Tweedie

ABSENT: Gordon Jackson

STAFF PRESENT: Chuck Davison, Brooke Burnham, Keba Baird, Yarina Valverde, Brendan Pringle, Jordan Carson

Call to Order at 8:36 am.

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

None.

CONSENT AGENDA

Announcements

Burnham reminded the Committee about the Tourism Exchange on May 8 at the Embassy Suites.

Cano notified the Committee about the Central Coast Tourism Council Retreat next week. Registration is \$225 for members and will take place in Solvang.

3. **Approval of March 13, 2018 Marketing Committee Minutes**

Public Comment – None.

Committee Discussion – None.

ACTION: Moved by **Tweedie/Cuming** to approve the Consent Agenda as presented.

Motion carried: 14:0
Brennan absent at time of motion

4. **Advertising & Marketing Update**

Burnham reviewed recent Travel Trade outreach efforts and trade programs. VSC will be attending IPW in May and a UK Sales Mission with Black Diamond in June.

Film SLO CAL will be attending the Film in California Conference on May 5. Burnham reminded the Committee that leads are being posted to appropriate partners in the SLO CAL Connection and VSC would like the DMO's to continue to encourage permitting partners in DMO areas to report to Film SLO CAL when filming is happening and where. Burnham reviewed YTD stats.

Carson reviewed the SAVOR Taste Washington booth installation and provided general event feedback as well as an update on VSC's new Product Promotion Program. Carson reviewed March web statistics.

Burnham reported out on recent PR efforts including deskside visits in New York and Seattle, as well as recent media visits, March media results and upcoming opportunities.

Valverde reviewed VSC's winter/spring paid media campaign including creative asset development. Burnham noted that VSC is reviewing Goodway's reporting structure, administrative management and strategy performance compared to what was initially promised.

Public Comment – None.

Committee Discussion - Tweedie asked a question about leads and the leads process. Burnham made note that VSC is building in quality checks to ensure the appropriate people are receiving the right leads. VSC does recommend that partners check SLO CAL Connection at least once a week in case there is a lead they might have missed.

Cuming asked if VSC will be sharing the lists of recent media who have been difficult to work with. Burnham noted VSC will be putting them into the CRM with notes, including challenges. Cuming also noted that when opportunities are being passed onto the DMO from Viist SLO CAL, it would be helpful to know why.

Sorgenfrei noted it would be beneficial on a big story or FAM to jump on a call to talk it through.

5. Marketing Committee Applications

Burnham reviewed the candidates for the open Marketing Committee seat: Shari Clark – Parker Sanpej; Alana Beal – Pasolivo; and Lindsey Hartig-Martin Resorts.

Public Comment – None.

Committee Discussion – None.

ACTION: Moved by **Cuming/Stroud** to recommend the Board approve Lindsay Hartig for the VSC Marketing Committee.

Motion carried: 13:0

Muran opposed. Sorgenfrei was absent at the time of motion.

6. Marketing Discussions

6a. Reporting Deep-Dive – Burnham reviewed media campaign reporting and tabled the Trendkite deep-dive for next month's agenda.

Public Comment – None.

Committee Discussion – None.

Adjournment

Meeting adjourned at 10:25 am.



VISIT



SAN LUIS OBISPO COUNTY
CALIFORNIA

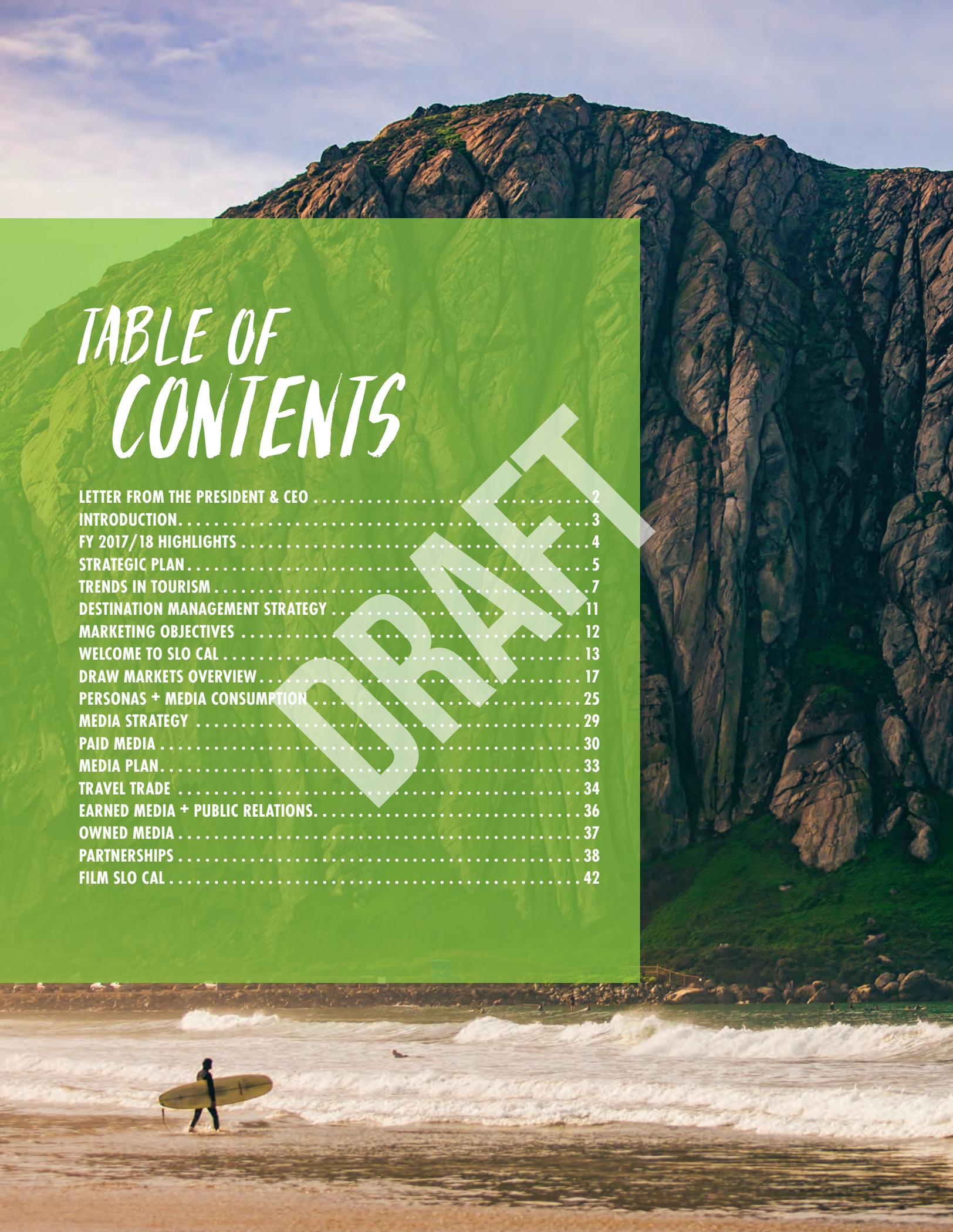
FY 2017/18

MARKETING PLAN

TABLE OF CONTENTS

LETTER FROM THE PRESIDENT & CEO	2
INTRODUCTION	3
FY 2017/18 HIGHLIGHTS	4
STRATEGIC PLAN	5
TRENDS IN TOURISM	7
DESTINATION MANAGEMENT STRATEGY	11
MARKETING OBJECTIVES	12
WELCOME TO SLO CAL	13
DRAW MARKETS OVERVIEW	17
PERSONAS + MEDIA CONSUMPTION	25
MEDIA STRATEGY	29
PAID MEDIA	30
MEDIA PLAN	33
TRAVEL TRADE	34
EARNED MEDIA + PUBLIC RELATIONS	36
OWNED MEDIA	37
PARTNERSHIPS	38
FILM SLO CAL	42

DRAFT



DEAR INVESTORS AND STAKEHOLDERS,

It is hard to believe we are more than halfway through the five-year District Management Plan and the Tourism Marketing District is about to be three years old. Together, in a very short time, we as an industry have accomplished much. With our Visit SLO CAL Board providing strategic direction, our team, committees and partners have continued to work hard for the success of our industry and our community.

In year three, we executed a number of key marketing initiatives, including 'round two' of a million-dollar-plus international marketing and advertising campaign. We launched the new, advanced SLOCAL.com; increased industry access and collaboration with the new SLO CAL Connection; and, as we close out the fiscal year, we are about to launch the #SoSLOCAL local brand ambassador program.

We also signed our first national public relations firm, Turner PR, and broadened our international sales efforts. We continue our initiative to advocate for the development of critical tourism infrastructure, including the expedited rebuilding of Highway 1 and championing new air service and recent air capacity expansions. Finally, and arguably our greatest undertaking since launching the new brand, we have embarked on building the Destination Management Strategy - a countywide, collaborative process that will take us well into the future, identifying ways to protect, improve and enhance the region's long-term quality of life and economic prosperity.

Our Strategic Direction 2020 remains the road map from which we set our priorities and focus on achieving our core mission to create greater awareness of our county and its assets and to increase demand for overnight stays. It is this strategic plan and our commitment to data-driven research and insights that have enabled our recent accomplishments and set the roadmap for the FY 2018/19 Marketing Plan.

In this plan you will see how the coming year's marketing program will support SLO CAL's tourism industry with an eye for sustainable and strategic economic growth. We will accomplish this through highly optimized and targeted earned, owned and paid media, travel trade sales, strategic partnerships and industry relations. Rather than a goal of more visitation simply through greater numbers of people, we seek to expand visitation during specific need times, and to target a higher impact guest who will stay longer and spend more, creating a greater per person investment in our economy.

As we embark on yet another exciting year, I want to again thank you for your ongoing support of Visit SLO CAL and the Tourism Marketing District. The 2018/19 fiscal year promises to be one of advancement, new endeavors, seasoned campaigns and intriguing opportunities for SLO CAL. In the pages that follow we invite you to explore our strategy for success in the coming year!



CHUCK DAVISON
President & CEO, Visit SLO CAL

INTRODUCTION

Visit SLO CAL (VSC) is a small but mighty team of destination marketing professionals who work with, and on behalf of, our community, our local partners and our investors to promote SLO CAL (San Luis Obispo County, California) to travelers from around the world. As the sole countywide non-profit destination marketing and management organization (DMO) for SLO CAL, VSC's goal is to work with partners to build the SLO CAL brand through a data-driven, efficient and dynamic marketing program. Built on research with a strategy of continuous improvement, this program aims to establish SLO CAL as a favorite West Coast destination known for its signature slower pace of life and unique mix of incredible, immersive guest experiences.

OUR VISION

A vibrant and prosperous San Luis Obispo County, fueled by a collaborative and flourishing tourism industry

OUR MISSION

Inspire travel and foster our unique experiences to create life-long ambassadors and economic growth for San Luis Obispo County

OUR VALUES

FUTURE FOCUSED: Delivering today with an eye on tomorrow

COLLABORATION: Our partnerships inform and support economic success

DRIVE: We bring enthusiasm to our initiatives and focus on results

STEWARDSHIP: We are mindful of our resources and the SLO CAL brand

OUR BRAND INTENTION

STRATEGIC: "They plan and execute."

CONNECTOR: "They bring people together."

CREATIVE: "They innovate and think differently."

INSPIRING: "They show us what's possible."

ESSENTIAL: "We need them in order to succeed."

FY 2017/18 HIGHLIGHTS



In January 2018, VSC's Board selected Resonance Consultancy to facilitate the Destination Management Strategy. This countywide undertaking is a collaborative process with a goal of outlining the evolution, marketing and management of our destination 20-30 years into the future. VSC will seek consensus among investors, stakeholders, government, strategic partners and community residents to identify ways to protect, improve and enhance the region's long-term quality of life and economic prosperity.



As part of a holistic effort to create awareness for SLO CAL and solidify the brand, VSC launched the new SLOCAL.com, a website developed by Simpleview Inc, the leader in web solutions for destination marketing organizations. Along with the new website, VSC rolled out a new CRM and the SLO CAL Connection as tools to help achieve organizational objectives.



In February, VSC won its first Visit California Poppy Award. The honor of Best Digital Marketing Campaign was given in recognition of the Life's Too Beautiful to Rush® campaign that introduced the first ever countywide destination brand, SLO CAL.



Starting in November 2017, VSC partnered with TURNER Public Relations, a national full-service public relations agency with a focus on travel and lifestyle. With TURNER, VSC further expands its commitment to establishing a compelling travel brand in both digital and traditional media outlets.



VSC is conducting a three-wave brand lift study (BLS) to measure consumer awareness of SLO CAL, the impact of VSC marketing and the likelihood of consumers to visit SLO CAL for leisure travel. Wave 2 of the study concluded in August 2017 and Wave 3 will be conducted this summer.



VSC serves as a strategic partner to the San Luis Obispo County Regional Airport by working to attract new air service to the market and expand flight capacity. In the past fiscal year, VSC supported the addition of 225+ daily seats, including a second daily flight from Denver, with a compelling, geo-focused marketing campaign in San Francisco, Los Angeles, Seattle, Denver and Phoenix.



VSC is working with Tourism Economics to conduct a countywide economic impact (EI) study and a separate domestic and international visitor volume study as part of its Destination Management Strategy. The EI study will establish a benchmark to measure future economic growth trends while the visitor volume study will allow VSC to track results quarterly and better understand the visitor impact to the market. VSC negotiated a co-op to allow the local DMOs to produce the same studies at the local community level for a discounted rate.

STRATEGIC PLAN

	Vision	Mission	Values
CLARITY	A vibrant and prosperous San Luis Obispo County, fueled by a collaborative and flourishing tourism industry	Inspire travel and foster our unique experiences to create life-long ambassadors and economic growth for San Luis Obispo County	<p>Future Focused Delivering today with an eye on tomorrow</p> <p>Collaboration Our partnerships inform and support economic success</p> <p>Drive We bring enthusiasm to our initiatives and a focus on results</p> <p>Stewardship We are mindful of our resources and the SLO CAL brand</p>

	Imperatives	Objectives
FOCUS	Optimize our organizational capacity	<ul style="list-style-type: none"> ○ Increased employee engagement and satisfaction scores ○ Ratio of administrative cost to economic impact
	Establish brand clarity and increased awareness through unified efforts	<ul style="list-style-type: none"> ○ Bi-annual growth of awareness in targeted visitor categories ○ Bi-annual growth of awareness in targeted markets ○ Bi-annual growth of awareness in targeted segments
	Build and expand strategic partnerships	<ul style="list-style-type: none"> ○ Balanced inventory of partnerships ○ Inbound partnership opportunities ○ Earned Partnership Value (EPV)
	Advocate for the development of critical tourism infrastructure	<ul style="list-style-type: none"> ○ Increased visitor volume ○ Increased international visitor volume ○ Draft of Tourism Infrastructure Master Plan completed ○ Increased total air service
	Demonstrate value to our stakeholders, partners and communities	<ul style="list-style-type: none"> ○ Year-over-year growth in total stakeholder participation at Visit SLO CAL events/ ○ Increased stakeholder satisfaction scores ○ Year-over-year growth in local media coverage ○ Deliver on objectives as stated in annual marketing plan ○ Community engagement with countywide tourism

Brand Intention Position

- Strategic
- Connector
- Creative
- Inspiring
- Essential

In order to best support the tourism economy in San Luis Obispo County, Visit SLO CAL provides:

High-quality and high-impact marketing initiatives scaled to reach key regional, national and global targets

A long-term, collaborative, and holistic approach that enables success for each tourism district and the County

Strategic research and sharing of vital tourism knowledge to all of its stakeholders, partners and communities

Initiatives

- Align our organizational structure with our strategic plan
- Establish a continuous learning program for the Visit SLO CAL Team
- Evaluate and develop the tools, systems and technologies we need to succeed

- Establish a unifying and emotionally resonant San Luis Obispo County brand
- Produce and share data-driven strategic insights
- Inspire and activate tourism ambassadors

- Develop a system for annual partnership planning
- Align resources to manage partnerships
- Identify, develop, and activate relationships
- Work with our partners to identify and reduce duplication of efforts

- Develop long-term Tourism Infrastructure Master Plan
- Enable access to San Luis Obispo County via increased transportation options
- Initiate feasibility plan for conference center
- Advocate and educate to support international tourism readiness

- Develop an engaged and high-functioning tourism culture for San Luis Obispo County
- Create an impactful annual marketing plan and timeline
- Develop and execute a local communication strategy
- Develop a plan for advocacy on behalf of stakeholders

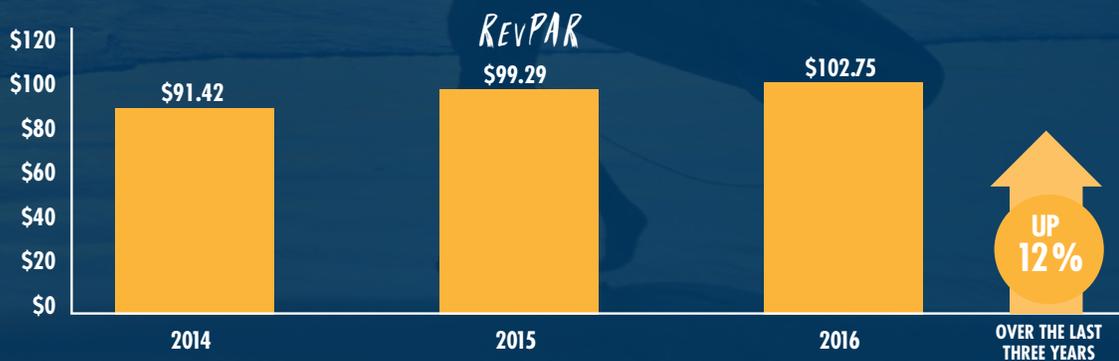
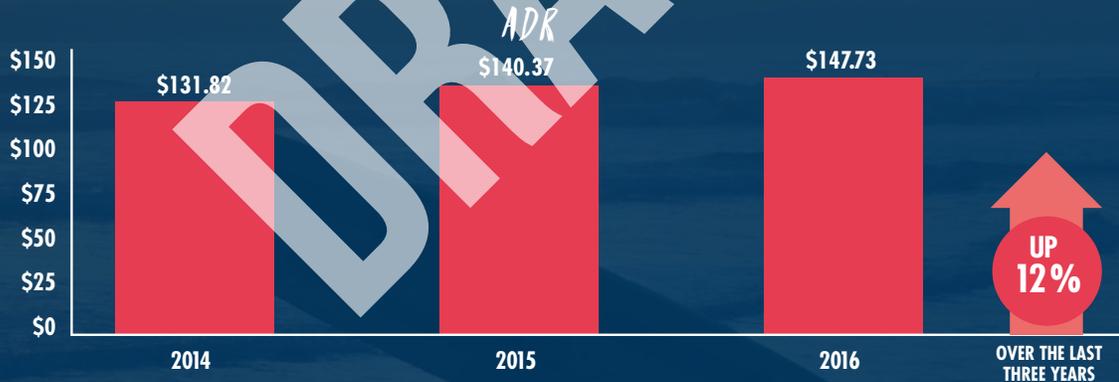
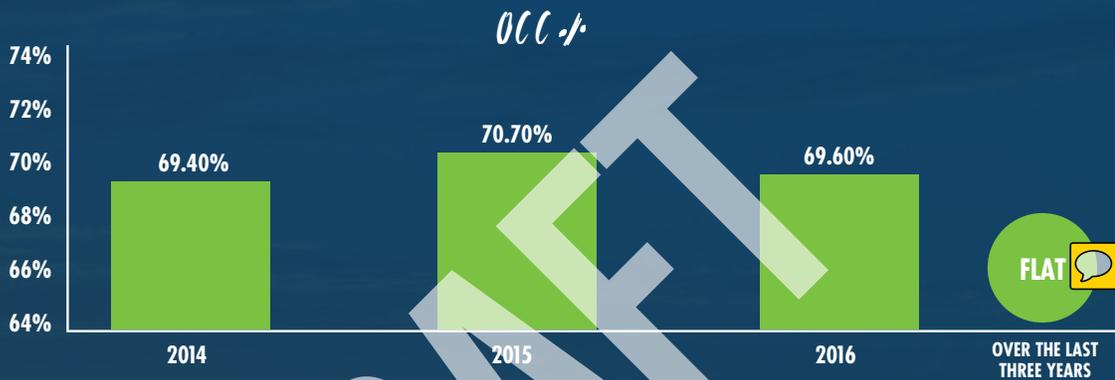
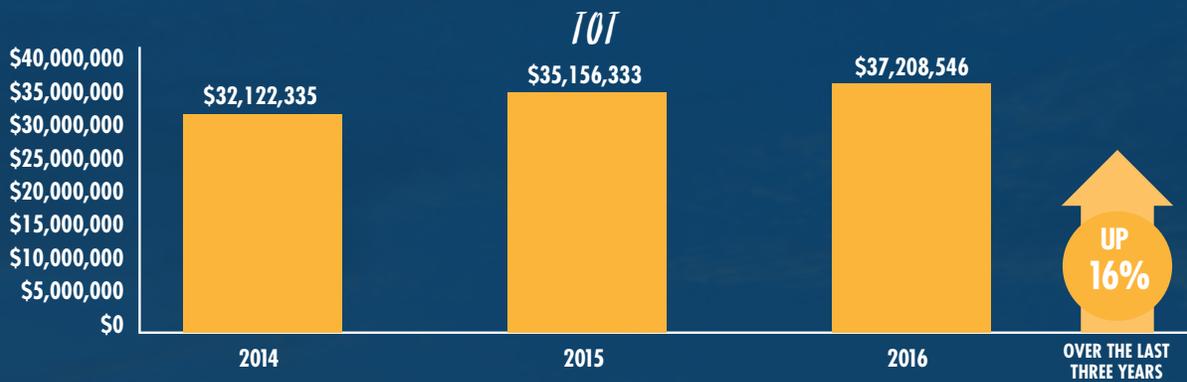
ACTION

meetings



TRENDS IN TOURISM

SLO CAL continues to see consistent increases in tourism's contribution to the local economy, and VSC expects that trend to continue for FY 2018/19. With consumer affinities such as health-conscious travel, skip-generation vacations, culinary tourism and sustainable travel on the rise, SLO CAL is uniquely positioned to take advantage of changing and dynamic travel patterns.



NOTE: Figures reflect a decrease in visitation due to the closure of Highway 1.

2018 TOURISM IMPACT



2.1% increase in tourism-supported jobs:

20,250



2.7% increase TOT revenue:

\$38,205,295



Travel spending:

\$1.75B



Travel & tourism earnings:

\$644.7M

Travel spending created **\$75.2M** in local tax revenue. Equal to:



751

police officers salaries



1,018

firefighters salaries



120

miles of 2-lane roads resurfaced



104

new parks

TRAVEL TRENDS

Travelers are using their mobile devices more than ever to make travel plans, but they are also increasingly looking to unplug from the digital world once they begin their journey. The rise of culinary tourism, a surge in luxury and family vacations, along with a more conscious traveler, put SLO CAL in a unique position to take advantage of evolving leisure travel patterns.

A GROWTH INDUSTRY

Given a strong domestic economy and a growing desire to explore the 'new,' all signs point to continued growth in travel and tourism. According to the U.S. Commerce Department, the United States would see a 3.3% compounded average annual increase in visitor volume during the 2016-2021 timeframe. By 2021, this growth would produce 94.1M visitors, a 21% increase, and more than 16M additional visitors compared to 2015.

EVOLUTIONS IN TRAVEL PLANNING

As attention spans continue to shorten and research goes more mobile, the landscape of travel planning is evolving daily, bringing new opportunities and challenges to marketers. Travelers are increasingly taking planning on the road with travel-related searches for "tonight" and "today" growing over 150% on mobile over the past two years¹. In fact, last year 79% of mobile travelers completed a booking after doing research on their smartphone, a 70% increase from 2016¹. Personal service, however, appears to be increasingly important as well, with 45% of mobile travelers calling to book or to get more information after doing travel research on their smartphone. This is significantly higher than in 2016 (37%)¹.

- 36% of travelers would be likely to pay more for their services if the travel brand tailored its information and overall trip experience based on personal preferences or past behavior.
- Searches for family vacation, luxury travel and couples travel and honeymoons grew at least 3 times faster YOY than searches in the adventure travel and ecotourism categories.
- 1 in 3 travelers are interested in using digital assistants to research or book travel.

FOODIE FORWARD TRAVEL

Once merely considered an amenity, food culture and culinary experiences are becoming destination drivers themselves, as evidenced by the 22 million Americans expected to

take culinary vacations in 2018². Even for those not driven primarily by food, 75% of travelers say that food and dining are an important part of their travel experience. Overall restaurant-related searches have grown by double digits in the past two years.² Travelers, however, do not want the ordinary. Lucky for SLO CAL and its diverse culinary scene, 95% of travelers say they seek to engage in "unique and memorable" food or beverage experiences while traveling³ such as touring wineries, dining with locals and taking cooking classes.

RESPONSIBLE TOURISM

Last year - 2017 - was officially designated as the United Nations International Year of Sustainable Travel and this designation clearly charted a course for the trend to take off in 2018. Whether social, environmental or economic, travel impacts are becoming more relevant in travel decisions, according to the Travel Market Report. Going "local" is a predominant consumer value, especially for millennials, and younger audiences are looking for responsible tourism as they seek to avoid the effects of over-tourism. Tourism entities are responding to this with advocacy campaigns that have evolved from focusing solely on the benefits of tourism to the community to campaigns that demonstrate how tourism can better the community.

GETTING OUT OF RANGE

The 24/7/365 plugged-in lifestyle appears to be wearing on consumers who are now actively looking to disconnect with the digital world and to reconnect with the real world. Travel focused on disconnecting is growing, according to Digital Detox®, an organization specializing in raising awareness about the implications of being always connected to electronic devices. New features, services and packages are emerging on the travel landscape to meet this desire. Phone-free properties, WiFi-free facilities, cell-blocking hotel rooms and other environments for IRL (In Real Life) connection are on the rise. Additionally, new analog wilderness camps for adults and concierge services promising off-the-grid campsites have emerged.

¹Think With Google data, 2018
²2016 Food Travel Monitor

DESTINATION MANAGEMENT STRATEGY

In January, VSC's Board selected Resonance Consultancy to facilitate the development of a Destination Management Strategy. This countywide undertaking is a collaborative process with the goal of outlining the evolution, marketing and management of SLO CAL as a travel destination 20-30 years into the future. VSC will engage investors, tourism stakeholders, public officials, businesses, nonprofits and residents countywide, creating a strategy that promotes a vibrant and prosperous San Luis Obispo County.

Over the coming decades, SLO CAL is facing a number of economic changes and challenges, including the forthcoming closure of Diablo Canyon. With tourism serving as the largest local economic driver outside of agriculture, there is significant interest in the reasons why a stronger and smarter tourism industry might help mitigate these impacts and promote a vibrant future for our community.

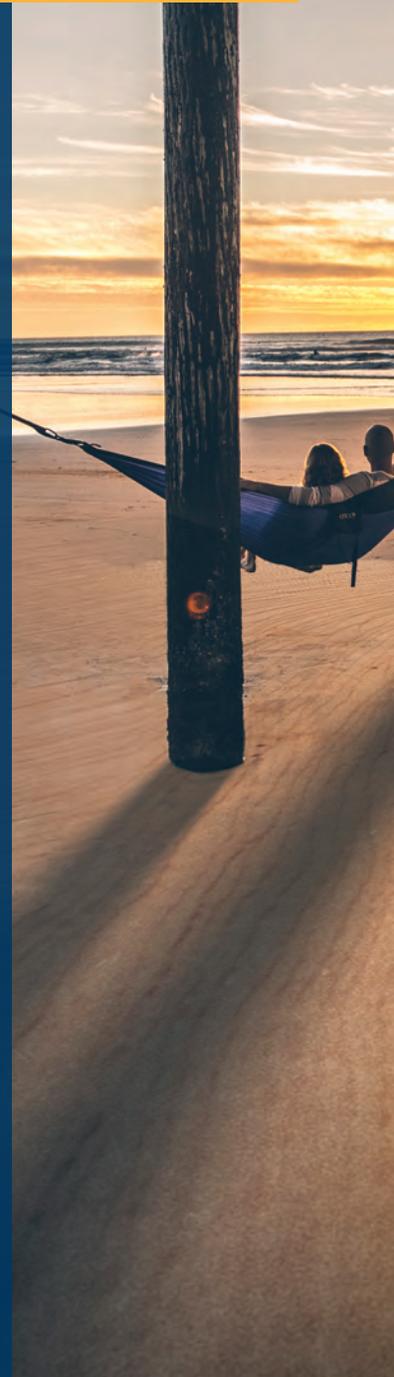
VSC is also mindful that as tourism increases, destinations that fail to plan for sustainable growth have encountered adverse effects on community and natural resources. As SLO CAL's brand and marketing reach more people, it is important that VSC and SLO CAL take appropriate steps to mitigate potential negative impacts and identify opportunities for investments in sustainable tourism.

Correctly identifying and understanding these aspirations and needs to develop a corresponding Destination Management Strategy will help SLO CAL reach its goal of realizing travel and tourism's full economic potential while preserving the quality of life and unique character of the destination.

METHODOLOGY

1. Kick-off and Stakeholder Analysis
2. Economic Impact Analysis
3. Consumer Research and Market Analysis
4. Destination Assessment
5. Stakeholder Engagement
6. Community Survey
7. Situational Analysis
8. Visioning Workshops
9. Draft Recommendations
10. Open House/Online Forum
11. Final Report and Delivery

As part of the Destination Management Strategy process, Tourism Economics is conducting an economic impact study, along with a visitor volume study for SLO CAL. Six SLO CAL destinations are participating at the local level as a co-op for access to similar information about their individual communities.



MARKETING OBJECTIVES

VSC's marketing program maintains three key objectives that were developed for the long term and which are refined to address the current context.

#1 BUILD AWARENESS OF SLO CAL BRAND AND DESTINATION

Leverage the strength of the new brand and the relationships with partners to magnify the reach of SLO CAL

Plan to Achieve: Paid, earned and owned media, co-op marketing, sponsorships, travel trade, promotions and partnerships, Film SLO CAL

Plan to Measure: Brand lift study, paid media performance, owned media engagement, co-op participation, sponsorship results and earned media coverage

#2 DEVELOP STRONGER AND DEEPER ENGAGEMENT WITH VISITORS

Work in support of the mission to reach audiences with the highest potential, creating life-long ambassadors and economic growth for the county.

Plan to Achieve: Website optimization; online and social media engagement; content development and distribution; ambassador and influencer programs; email marketing

Plan to Measure: Website engagement (time on site; pages per session, number of high-value web activities); paid media performance (cost per activity; cost per non-bounced user; cost per minute of engagement); social media consumption and engagement (video views, comments, likes and shares)

#3 DRIVE DEMAND FOR VISITATION TO THE COUNTY

Deliver an integrated marketing campaign built to reach targets with the highest potential for visitation and that supports activity in other sales channels (Travel Trade, Film, etc.).

Plan to Achieve: paid, earned and owned media; co-op marketing; sponsorships; travel trade; public relations; promotions and partnerships; Film SLO CAL

Plan to Measure: referrals to partners, arrivals in market, revenue per available room (RevPAR), TMD Assessment and Transient Occupancy Tax (TOT)

WELCOME TO SLO CAL

The SLO CAL brand represents and unites the entire county through a trademarked logo, brand promise, iconic photography and engaging video. These elements are incorporated throughout VSC's marketing efforts, including advertising, PR, social media, the new SLOCAL.com website, promotional videos and email marketing.

SLO CAL establishes a geographic location for the county while representing its unique pace of life and personality. The brand evokes feelings of relaxation and the freedom to experience life at your own pace – the SLO CAL way of life.



HOW WE ARRIVED AT SLO CAL

THE PROCESS

In 2016, VSC conducted multiple research studies to inform the branding process, including a feeder market awareness study (FMS), a share of wallet study (SOWS) and demographic study, surveying over 2,200 consumers to gauge awareness and perception of San Luis Obispo County as a tourism destination. Through these studies, VSC found that the majority of consumers surveyed were not familiar with San Luis Obispo County or what it offers to travelers. When compared to competitors with similar attributes, San Luis Obispo County was perceived as not having an advantage over them and lacking in other desired attributes.

COLLABORATION AND ASSESSMENT

To overcome this lack of awareness and to capitalize on positive attributes, VSC presented the consumer research to its creative agency, BCF, and asked that it craft a brand that would emotionally resonate with consumers. VSC invited over 900 county stakeholders to interviews and meetings and used the feedback, in combination with that of the Marketing Committee, Board of Directors, staff and agency, to develop brand concepts. These concepts were then shared and tested, both locally and in our key markets, to ensure authentic representation and effective consumer engagement.

BRAND DELIVERY

In January 2017, the new SLO CAL brand and corresponding “Life’s Too Beautiful to Rush®” campaign was launched with digital banners, social media, native and video communications in key target markets of Los Angeles, San Francisco, Phoenix, Las Vegas and San Diego. Since then, San Diego has been replaced with Seattle and Denver in order to support new flight markets. In February 2018, VSC launched the new SLOCAL.com experience, which embodies the SLO CAL brand through a streamlined user interface, improved storytelling, photography, aerial videos of the county and other customizations that highlight each of SLO CAL’s communities in a unique, inspiring way.

MEASUREMENT

VSC is conducting a three-wave brand lift study to measure the long-term impact of the SLO CAL brand marketing. In partnership with Research Now, the study measures familiarity with the destination, the effectiveness of different advertising concepts and the likelihood that people will visit. So far, VSC has observed the following results when comparing Wave 2 (Jan 23 -Feb 6, 2017) to Wave 1 (July 7 - August 10, 2017) results:

- More people reported to have seen, read or heard any advertising about SLO CAL in the past six months in Wave 2 compared to Wave 1 (29% vs. 25%; +4 points).
- More people were “very likely to visit” SLO CAL both prior to seeing advertising (+2 points) and after seeing the advertising (+4 points).
- Among those who recall past advertising, 40% visited SLO CAL as a result (+1 point vs. Wave 1).

MOVING FORWARD

VSC’s marketing strategy will continue to focus on expanding the brand presence for SLO CAL, growing awareness of the destination, developing a stronger and deeper engagement with visitors and driving demand for visitation to the county. Expanding translated marketing, investing more in content development, creating sub-campaigns and inviting the local community into the SLO CAL brand are all ways that VSC will seek to achieve these goals in the coming year.

LIFE'S TOO

BEAUTIFUL

TO RUSH[®]

VISIT



SAN LUIS OBISPO COUNTY
CALIFORNIA



DRAW MARKETS

OVERVIEW

DRAFT





Using the Feeder Market Study, Share of Wallet Study and Brand Lift Study data, VSC analyzed the draw markets based on the following criteria:

MODERATE LOW AWARENESS

BCF believes the greatest opportunity for growth is to focus on age cohorts who have a lower awareness of the county. In BCF's experience, marketing/advertising best practices indicate that there is greater opportunity at the brand development stage to move the needle from moderate awareness to high, more so than from high to even higher. This practice also exposes the destination to a new set of prospects for message testing.

PROSPECT VERY LIKELY TO VISIT

While the county scores high when combining "very likely to visit" with "somewhat likely to visit," BCF recommends narrowing the focus to those audiences that are "very likely to visit."

TRAVEL SPENDING

Because economic growth and tax revenue are critical for San Luis Obispo County, the recommendation is to focus on those travelers who have a higher propensity to spend more on trips in general or have spent more while visiting the county. BCF analyzed various cross tabs from the SOWS as well as the FMS to develop this position.

FAMILIARITY WITH THE DESTINATION

Prioritizing of geographic markets considered both familiarity with the destination (cited as the reason for travel) and lack of familiarity with the region (cited as the reason for lack of visitation).

AVERAGE ADVERTISING COST

By assessing the size of a potential geographic market, along with average "costs to advertise" for effective penetration, BCF was able to determine the budget allocations required per market to prioritize the media budget allocations to maximum effect.

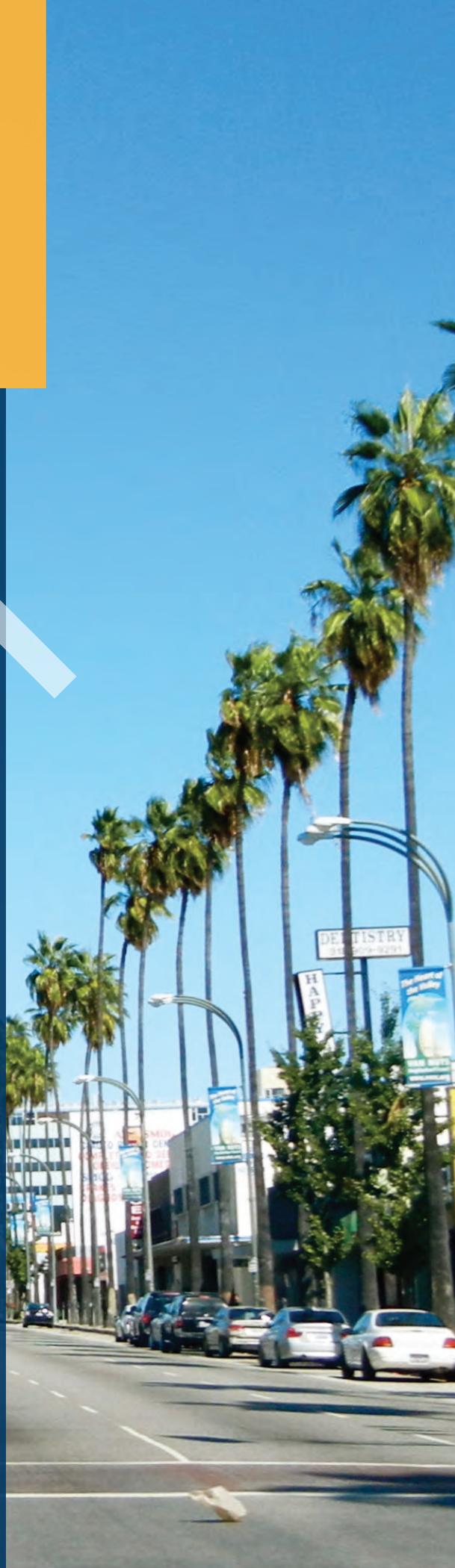
Note: Because of these qualifiers, we will not be placing media in the Central Valley, leaving opportunities for city-specific marketing.

#1 LOS ANGELES

VENTURA + LOS ANGELES COUNTIES

In general, Los Angeles ranks highest of all the geographic markets in awareness and past visitation. In addition, it is a close-in market with a critical mass population from which to draw. Within this geographic market, the target populations are A25–34 and A45–54. The data below illustrates the rationale for selecting these two demographics:

- **AWARENESS:** Los Angeles has the highest initial awareness of all markets; however, A25–34 and A45–54 have the lowest awareness of all cohorts within the Los Angeles market, and rank 10th and 8th respectively among all cohorts measured.
- **LIKELIHOOD OF VISITATION:** Comparatively, Los Angeles scored low on likelihood to visit, with A45–54 ranking 7th and A25–34 falling out of the top 10. However, this lower ranking was mitigated when looking at the other factors contributing to attractiveness for A25–34 (e.g., spending in market, awareness, critical mass of population, proximity).
- **TRAVEL SPENDING:** A45–54 and A25–34 ranked 10th and 3rd, respectively, on the travel spending for the cohort.
- **FAMILIARITY WITH THE DESTINATION:** The A45–54 ranked 4th, and A25–34 ranked 7th in citing familiarity as a reason to visit the destination.
- **AVERAGE ADVERTISING COST:** While high, the cost of advertising in this market is not prohibitive. Given the size of the market, ability to hyper-target within it and relative ease of travel from Los Angeles to San Luis Obispo County, the cost of advertising did not lower the prioritization.
- **OTHER:** Based on past visitor data, we also know that the interests shared by these two groups overlap and perform strongly as points of differentiation for the county:
 - Weather, beaches, dining
 - A25–34 also cited family and quality
 - A45–54 also cited familiarity and wine





SAN FRANCISCO #2

*CITY OF SAN FRANCISCO, CONTRA COSTA,
ALAMEDA + SANTA CLARA COUNTIES*

San Francisco is another close-in market with a critical mass of population. It ranks 2nd on our list because intent to travel to SLO CAL is the highest compared to the other target markets. We believe there is opportunity to expand brand reach in San Francisco, especially within the selected cohorts of A25–34 and A35–44.

- **AWARENESS:** These two groups ranked lowest (A25–34) and 2nd lowest (A35–44) on prospect awareness among the San Francisco market, while ranking 4th and 10th respectively among all cohorts.
- **LIKELIHOOD OF VISITATION:** As compared to other markets on the whole, the likelihood of visitation is low for the San Francisco cohorts, but within the cohort set, A25–34 ranks 1st and A35–44 ranks 2nd.
- **TRAVEL SPENDING:** For travel spending, A25–34 ranked 4th while A35–44 fell out of the top 10.
- **FAMILIARITY WITH THE DESTINATION:** San Francisco as a whole did not perform well on citing familiarity as the reason for visitation with all cohorts falling out of the top 10 on this metric.
- **AVERAGE ADVERTISING COST:** The cost to advertise to our target in San Francisco is in the high range compared to all the other markets.
- **OTHER:** Interestingly, based on past visitor data, unlike the previous cohorts, these two groups in San Francisco did not have the same kind of overlap in interests in the types of experiences they choose in the county:
 - A25–34 also cited weather, beach, exciting, family, quality
 - A35–44 also cited familiarity, accessibility

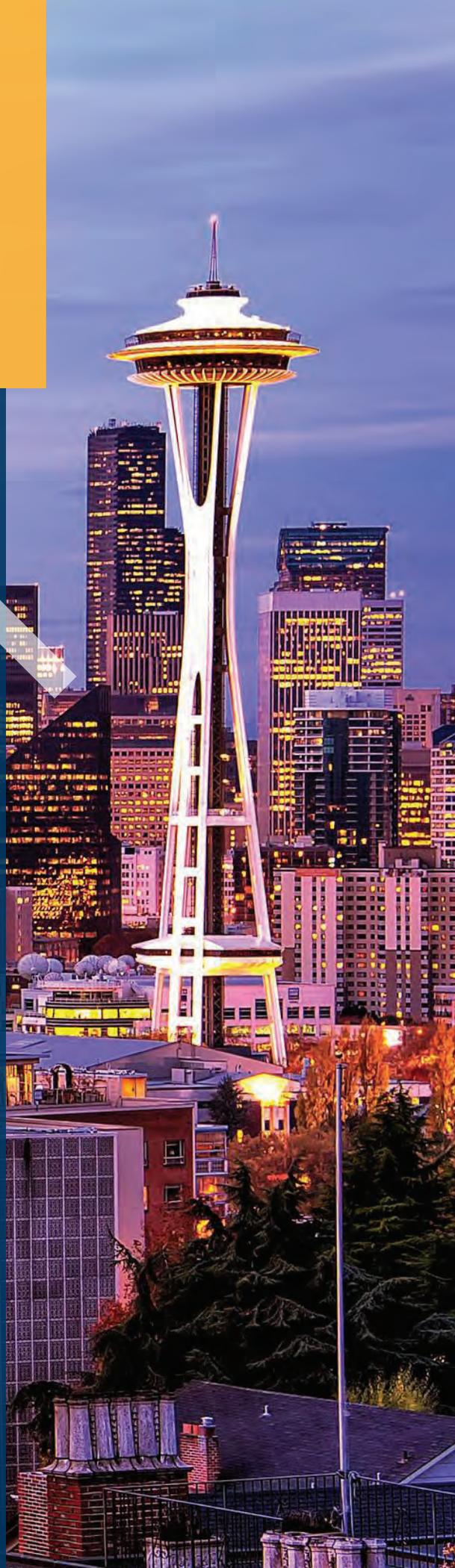
#3 SEATTLE

KING + SNOHOMISH COUNTIES

Seattle ranks high on the prioritization list and provides an opportunity for expansion should we sufficiently manage to drive demand for an additional flight(s) into the county. The cohorts selected for Seattle are A25–34 and A35–44. Seattle ranks 2nd in lack of prospect awareness on the whole, and within the cohort group we saw that the A25–34 and A35–44 were least aware.

- **AWARENESS:** A35–44 had the lowest awareness of all cohorts, while A25–34 ranked 3rd lowest.
- **LIKELIHOOD OF VISITATION:** A25–34 and A35–44 ranked 1st and 5th, respectively.
- **TRAVEL SPENDING:** A25–34 and A35–44 ranked 1st and 2nd, respectively.
- **FAMILIARITY WITH THE DESTINATION:** The A45–54 ranked 4th and A25–34 ranked 7th in citing familiarity as a reason to visit the destination.
- **AVERAGE ADVERTISING COST:** The cost to advertise is significantly lower than in other target markets given Seattle’s relatively small size.
- **OTHER:** We placed Seattle higher on the prioritization list due to the information gathered from past visitor responses about spending in the county. For past visitors, these two cohorts ranked 1st (A25–34) and 2nd (A35–44) in spending. The other factor that played into Seattle’s ranking was the new direct flight route with Alaska Airlines, which we hope will encourage flights on that route.

- o Events, weather, family, excitement
- o A25–34 also cited beach and dining
- o A35–54 also cited value and quality



DENVER #4

DENVER, ARAPAHOE, JEFFERSON, ADAMS, DOUGLAS,
BOULDER, LARIMER + EL PASO COUNTIES

Denver is another new fly market that provides an opportunity for expansion should we sufficiently manage to drive demand for an additional flight(s) into the county. The cohort selected for Denver is A25-54.

- **AWARENESS:** Denver had the lowest awareness among the six draw markets.
- **LIKELIHOOD OF VISITATION:** As compared to other markets on the whole, the likelihood of visitation is the lowest for Denver.
- **TRAVEL SPENDING:** For travel spending, Denver ranked the 2nd lowest.
- **FAMILIARITY WITH THE DESTINATION:** Denver scored the lowest in familiarity with the destination.
- **AVERAGE ADVERTISING COST:** The cost to advertise in Denver is in mid-to-high range.
- **OTHER:** The obvious factor that played into Denver's higher ranking was the new direct flight route with United Airlines. Denver area residents look for the following in leisure destinations:
 - o Outdoor recreation, relaxation, exploring new things

#5 PHOENIX

MARICOPA COUNTY

Another fly market, Phoenix, ranks 5th on the prioritization list. Industry data indicates that we can expect travelers coming from fly markets to stay longer. That fact, coupled with data showing that Phoenix ranks 3rd lowest in prospect awareness, justifies Phoenix's position as a target market.

The cohorts selected for Phoenix are A35–44 and A45–54.

- **AWARENESS:** These two groups deliver the lowest awareness (A35–44) and 3rd lowest (A45–54) among all cohorts in Phoenix, with A45–54 in a virtual tie with A25–34 in the market.
- **LIKELIHOOD OF VISITATION:** A35–44 tied for 3rd on likelihood to visit the county. The A45–54 group fell out of the top 10.
- **TRAVEL SPENDING:** Phoenix performed particularly well on this factor, as A35–44 ranked 9th in travel spending, and A45–54 ranked 7th.
- **FAMILIARITY WITH THE DESTINATION:** Phoenix performed poorly on this metric, with each cohort falling out of the top 10.
- **AVERAGE ADVERTISING COST:** The cost to advertise in Phoenix is in the mid-to-high range of the target market list.
- **OTHER:** Referencing past visitor data, we know that the two groups share some similar interests:
 - Weather, family
 - A35–44 also cited value, exciting, dining
 - A45–54 also cited beach



LAS VEGAS #6

CLARK COUNTY

Las Vegas is a fly market, and even though there is more than one flight per day (unlike Seattle) into the region, the general population density/critical mass of the target and the almost 50/50 level of propensity to visit for most of the cohorts resulted in this market's 6th place ranking.

However, there is opportunity in the A25-34 and A35-44 set because both rank relatively well in the likelihood to visit and travel spending categories.

- **AWARENESS:** The A25-34 ranked 2nd in awareness, while A35-44 fell out of the top 10 among all cohorts
- **LIKELIHOOD OF VISITATION:** The A35-44 group ranked highest in likelihood to visit, ranking 6th among all cohorts. A25-34 fell out of the top 10.
- **TRAVEL SPENDING:** The A25-34 was the highest in the cohort set in travel spending, ranking 6th while all other Las Vegas cohorts fell out of the top 10 in this metric.
- **FAMILIARITY WITH THE DESTINATION:** Las Vegas scored particularly low on this metric, and this was the key metric that pushed Las Vegas down in priority.
- **AVERAGE ADVERTISING COST:** The cost to advertise to our targets in Las Vegas is on the lower end.
- **OTHER:** We accounted for the fact that, as previously noted in other fly markets, the propensity to stay longer (and therefore spend more in market) was a factor for Las Vegas's ranking. However, the limitation of three flights a week into the region also factored into the ranking. Past visitor data showed some overlap in desired experiences for these two groups:
 - o Weather, family, beach, dining
 - o A25-34 also cited quality, exciting, wine
 - o A35-44 also cited familiarity



PERSONAS + MEDIA CONSUMPTION

Traditional demographics alone are not enough to build a strategic picture of the target audience for VSC. Psychographic segmentation takes the nuance of our targets' lives into account. It goes beyond the household income, age, education level, etc., to uncover the beliefs, motivations, aspirations and lifestyles that will enable us to engage the person, not just the target. Understanding the way the people in the target geographies interact with information about travel and what informs their decisions is a start. The crux of our media strategy is digital, which falls in the top two sources for most prospective respondents across all target markets.

ACTIVE ADVENTURER #1

**ACTIVE, MID-HIGH AFFLUENT, EDUCATED,
DEEPLY PASSIONATE EXPERIENCE-SEEKERS**

"I keep on the go, but like to plan my travels for outdoor communing. I stay connected to share my travel, experiences and memories, but my real motivation is seeing the world. Breathing salty sea air and eating fresh local foods bring me back to myself and that's why I travel."

WHAT MATTERS TO THE ACTIVE ADVENTURER?

The Active Adventurer is motivated by a dynamic and participatory lifestyle with a tendency to forge deep and abiding connections with brands and places. Forty-three percent of outdoor consumers have kids at home and are committed to grooming the next generation of outdoor enthusiasts. (Source: Mintel, *Outdoor Enthusiasts-US*, March, 2017)

WHY THE ACTIVE ADVENTURER MATTERS FOR VSC

With green hills, countless miles of hiking and biking trails, great bouldering and an average of 300+ days of sunshine, SLO CAL is paradise for the Active Adventurer. This group fits squarely in our target market, with interests closely aligned to the SLO CAL lifestyle, attributes and products. Prospective visitors to the county are not aware of the outdoor activities and/or do not think them compelling enough to make a trip.

With their interest in outdoor pursuits such as paddle boarding, we expect that 30% will spend \$2,500 or more per trip, while the other 70% spends \$1,000 or more per trip. (Source: FMS and SOWS) The highest numbers come from Seattle (61.5% of adults 25-34 spend at least \$2,500 per trip) and Los Angeles (31% of adults 25-34 spend at least \$2,500 per trip).

THE ACTIVE ADVENTURER AND MEDIA

Social media, the digital space and friends and family are dominant sources of information for this group. For a subset of the persona (GenX and millennial males), TV is also influential, but on-demand and streaming usage limits the effectiveness of broadcast with this group. They're heavy users of mobile and internet; they like to discover the undiscovered and are regularly searching online for events, trips and opportunities to jump into new experiences.

The Active Adventurer persona shares many attributes with the state's Avid Adventurer and Natural Nurturer, implying shared contact with this persona within the sales funnel.

#2 MOM TO THE MAX

**SCHEDULED, CONNECTED, AFFLUENT,
TRANSPARENT (THE GOOD AND THE UGLY)**

"I want to be in the know, connected and learning from other mothers and their experiences. I want to make my money work harder and last longer. I try to stay on top of cultural trends, especially when it comes to the well-being of my family."

WHAT MATTERS TO THE MOM TO THE MAX?

Family and friends motivate mom. She's highly digital and rarely misses an Instagram post or an opportunity to share her inspirations. Creativity and new trends in home care, family life, decor and travel experiences are top of mind for Mom.

Mom and her partner express an indestructible commitment to their family. She wants it all for herself and her family, but she wants value for her dollar, too.

WHY THE MOM TO THE MAX MATTERS FOR VSC

Mintel's research shows that heritage and culture are Mom's primary travel motivation, thus she demands educational value and authenticity in her family's travel experiences. She and her family are thrilled to take a day trip to the Mission, search for shells on the beach and will take full advantage of local sitters so she and her partner may enjoy the more mature experiences offered in SLO CAL.

Mom to the Max will be traveling with family, which makes it more likely that she'll spend at least \$2,500 in-market. Factors such as family dining, kids' excursions and child care fees contribute to the spend, which she is likely to reach, easily, over a two to three day stay in market.

THE MOM TO THE MAX AND MEDIA

In priority order, the Mom to the Max interacts on: internet, mobile devices, television, radio, print, direct mail, out-of-home product placements and sponsorships. She watches TV, but is more apt to stream that content via Hulu or other platforms where commercials can be blocked; or, when she is watching traditional broadcasts, she uses commercial breaks as time to check work emails or tend to something around the house.



CULTURED CLASS #3

EDUCATED, RISK TAKERS, GRACIOUS,
CONFIDENT, PROFESSIONALS

"I'm never unplugged—a new age renaissance person. I'm always engaged and on the cusp of new trends. Education, music, family, the arts and fine culinary experiences drive me to connect, continue to learn and be the first-to-know in my friend group. I want out-of-the-box experiences. I want to return from a trip renewed, revived and ready to take on the next thing. I demand value when I invest in leisure and relaxation."

WHAT MATTERS TO THE CULTURED CLASS?

The Cultured Class seeks the unexpected and new. They look for experiences that can elevate their lives and connect them to the world in unexpected ways. These are the people who not only want to have the experience for themselves, but who, as trusted advisors to their friends, family and follower groups are invested in sharing new things and encouraging others to join in.

WHY THE CULTURED CLASS MATTERS FOR VSC

The Cultured Class (with annual household income greater than \$100K) is more likely to take vacations (92%). (Source: Nielsen PRIZM data and Mintel Research) The affluent Cultured Classers tend to be older. Four out of five have children, so when targeting the affluent Cultured Class, families (i.e., with young children) need appropriate consideration.

The Cultured Class picks their destinations by researching more than three sources. (Source: Nielsen PRIZM Segmentation) While the majority of the Cultured Class prefers to start planning trips three to four months in advance, this spontaneous generation of travelers is also two to three times more likely than older travelers to start planning within weeks of departure. SLO CAL is the perfect last minute (booking) getaway for our Cultured Class.

Experience, education, culinary expertise and local culture are drivers for this group, and SLO CAL offers a diverse menu of options certain to satisfy their needs. Wine tasting, trips to the Mission and a couple nights stay at a boutique hotel meshes perfectly with our Cultured Class. For these travelers, food and drink is not just an interesting part of their experience, but a major factor that actually drives travel decisions. Indulging in fresh, local culinary culture on a quick getaway or "girls weekend" is highly appealing to the Cultured Class when considering travel to SLO CAL. (Source: 2016 Food Travel Monitor Study)

THE CULTURED CLASS AND MEDIA

They are selective when it comes to media interactions and are the only one of the set where radio (digital and XM) makes the list. The top performers for this group are the internet and mobile.

MEDIA STRATEGY

VSC's persona-based media strategy focuses primarily on digital executions. Consumers are increasingly more influenced by their online interactions, using multiple devices when making travel decisions. By exploiting these preferred digital mediums to build brand awareness and affinity, while supporting lower funnel channels like paid search and social, VSC's strategy aims to be in front of the right audience at the right place and at the right time. In the micro-moments era, where people turn to their devices to help them make decisions, being present at different steps of the user's travel journey is key to create that top-of-mind awareness and intention to visit SLO CAL.

VSC'S APPROACH TO MEDIA RELIES ON THREE FOUNDATIONAL PILLARS:

- 1. RESEARCH:** Media flight dates, persona targeting and budget allocation are decisions based on research, insights and a close study of the tourism industry.
- 2. MULTI-CHANNEL:** Awareness is not established through frequency alone, but instead by staying top-of-mind, reaching an audience on multiple, complementary channels and with a variety of messages.
- 3. EVOLVING:** Testing assumptions and quickly incorporating learnings are critical to staying relevant and effective while also maintaining efficiency.

VSC relies on experienced media agencies for crafting strategies that support the organization's objectives, while providing guidance and communicating objectives clearly.

PAID MEDIA

PAID SOCIAL MEDIA

Working in unison with SEM (Search Engine Marketing), social platforms enhance awareness and brand reach by engaging consumers in a space in which they are naturally relaxed, open to messaging and often already seeking inspiration. A combination of multi-media and video ads on Facebook and Instagram will support brand engagement while also promoting website traffic. Custom and lookalike audiences allow for remarketing, while refined interest and behavior targeting ensure coverage of all key personas. A multi-layer targeting approach allows VSC to reach target audiences at different points of their travel planning journey.

- Social media is uniquely positioned to deliver both brand awareness and consideration/engagement metrics, more so than any other channel.
- Facebook ads and promoted posts will be used for content messages for lower-funnel activations like promotions, special events and deals.
- Carousel, video, image, slideshow, canvas and post engagement ads on Facebook and carousel and video ads on Instagram are the main formats that constitute the social ads portfolio.

PAID MEDIA

PROGRAMMATIC DISPLAY

Whether through banners, native or video advertising, the key to a successful programmatic campaign is effective targeting and personalized messaging. Programmatic provides the ability to target at scale and optimize to formats consumers are most engaging with. Display banner campaigns, while not shiny and new, have their place in driving efficiency and scale. Native advertising has an organic appeal as it follows the natural form and function of the user experience in which it is placed, producing quality traffic and driving brand lift. In 2018, it is expected that over \$5.7 billion will be spent on native advertising, making it the largest format of digital advertising. Finally, pre-roll video gives VSC another means to provide inspiration to new audiences and has proven to engage target audiences at higher levels than other programmatic tactics.

- **BANNER** ad campaigns allow for targeting the most relevant audiences, delivering creative with the highest engagement and testing the effectiveness of messages, creative elements and placements. These units will be purchased through biddable, exchange-based DSP platforms to control costs, while providing detailed pockets of optimization. This will enable the campaign to be continually optimized.
- **VIDEO** According to Miles Partnership, video advertising is one of the most effective formats available in creating immediate awareness in consumers' minds, showing the highest level of recall and impact among all formats measured. Leveraging video units to increase awareness in key markets with lower awareness, such as Seattle and Denver, will be critical to establishing a foothold within these markets.
- **NATIVE** advertising has evolved into one of the most effective forms of paid media. Sold on a cost-per-click basis, native units mimic their environment, making them more apt to engage the user.

SEM

SEM activities support the VSC's brand initiatives by focusing on upper-funnel search queries specific to regional and local travel (such as Central California beach vacations, California winery tours and things to do in Central California). This approach aims to ensure the SLO CAL brand and destination reaches consumers when they are actively searching for travel in this area. These campaigns allow VSC to take advantage of specific topics and user areas of interest when conducting online research. SEM allows VSC very strict control over where and when to drive traffic to the website, enabling nimble management of website traffic according to the seasonality, weather or current events.

A photograph of a motorcycle rider on a scenic coastal road. The rider is wearing a leather jacket and a white helmet, and is riding a motorcycle. The background shows a clear blue sky, a blue ocean, and a coastline with green hills. The image is used as a background for the text on the page.

CO OPERATIVE ADVERTISING

The co-op advertising plan is designed to extend opportunities to vsc partners that would not be possible on an individual basis and that will provide measurable and tangible results.

VSC aims to offer attractive co-op opportunities and get partners' input to select the most promising strategies. Potential include:

- **DIGITAL SOCIAL AND NATIVE ADS:** Leveraging VSC's digital campaign to provide access to more sophisticated advertising technologies like advanced programmatic and enhanced targeting.
- **IN-FLIGHT MAGAZINES:** A multi-page print spread with one of SLO CAL's carrier airline in-flight magazines, designed to deliver significant reach and large impact with travelers within the key feeder markets for the county. This type of program is a cost-effective shared piece that allows participating partners to speak in a singular voice while promoting key attributes of their region.
- **SAVOR SLO CAL:** Designated destination space and promotional package at VSC's SAVOR event activation at food and wine festivals in Denver, San Diego and Seattle.
- **LOOKING AHEAD:** Additional initiatives in consideration include a Google Trekker co-op to map select off-road areas of the county, a programmatic direct mail campaign to retarget website visitors through postcards and an asset and content development program for photo and video creation.

MEDIA PLAN

MEDIA FLIGHTS

MEDIA	JUL	AUG	SEPT	OCT	NOV-DEC	JAN	FEB	MAR	APR	MAY	JUN
MARKET											
LOS ANGELES			AUG 14 - SEPT 30	OCT 1-31		JAN 29-FEB 25		FEB 26-APR 29			
SAN FRANCISCO			AUG 14 - SEPT 30	OCT 1-31		JAN 29-FEB 25		FEB 26-APR 29			
SEATTLE			SEPT 1-30	OCT 1-31		JAN 29-FEB 25		FEB 26-MAR 31			
DENVER			SEPT 1-30	OCT 1-31				MAR 1-APR 29			
PHOENIX		AUG 1 - SEPT 30						FEB 26-MAR 31			
LAS VEGAS		AUG 1 - SEPT 30									
NATIONAL		AUG 1 - SEPT 30		OCT 1-31		JAN 29-FEB 25		FEB 26-APR 29			
VEHICLE											
BRAND PARTNERSHIPS			SEPT-OCT					FEB-APR			
IN-FLIGHT MAGAZINES									APR		
OOH - SEATTLE MALL						JAN 29 - FEB 25					
SEM											
SOCIAL											
PROGRAMMATIC/ NATIVE											
CONNECTED/ ADDRESSABLE TV											
STREAMING AUDIO											
TRAVEL PARTNERS											
TEST & LEARN											
CO-OP											

MEDIA SPENDING BY CHANNEL

CHANNEL	SHARE OF BUDGET
SEM & SOCIAL	\$399,000 / 42%
DISPLAY, PRE-ROLL VIDEO, NATIVE	\$380,000 / 40%
CO-OP	\$171,000 / 18%
TOTAL	\$950,000.00

*Figures include media management fees

TRAVEL TRADE

In FY 2017/18, VSC's Travel Trade program expanded to include new trade shows, expanded partnerships in sales, new translated email marketing and more. For the coming year, targets for Travel Trade include:

- Promoting international and domestic tour travel.
- Generating meeting and conference leads.
- Engaging individual travel agents and agencies.
- Solidifying key industry association memberships.
- Facilitating associations and government synergies.

TOUR AND TRAVEL

With the SLO CAL brand gaining traction in international and domestic travel markets, VSC will continue to target and build market share in top international markets: China, UK, Europe, Canada and Mexico. To accomplish this, VSC's trade show strategy will include WTM in the UK for a second year, GoWest Summit, NTA and IPW. VSC will contract with Black Diamond for the third year to promote SLO CAL in the UK market, and will participate in Visit California's sales missions in China and Mexico. Additionally, independent sales missions will be conducted by VSC, including domestic missions targeting the top inbound tour operators in California and one in the UK, supported by Black Diamond.

Familiarization (FAM) trips will be used to showcase the county's destinations and diverse offerings firsthand. VSC works closely with Visit California and utilizes Black Diamond's strategic approach to host FAM trips that include top international markets.

To assist our stakeholders in capturing travel trade business, VSC will be offering educational resources throughout the year. These will include in-market educational sessions, as well as online tools posted on the new SLO CAL Connection. Once again, VSC will offer co-op participation in the SLO CAL booth at IPW, the largest international travel trade show in the U.S.

MEETING AND CONFERENCE

To assist with mid-week and shoulder season bookings, VSC targets meeting planners who cover corporate and government segments. VSC will focus on the key feeder markets of Los Angeles, San Francisco/Bay Area and Sacramento. Staying top-of-mind is critical in the meetings industry, so VSC will continue to have a strong presence in key meeting planner associations, including MPI, CalSAE and GBTA. Co-op opportunities will be presented to stakeholders to participate with VSC at trade shows, including MPI Expo, CalSAE and MPI Sacramento/Sierra Nevada trade show.

VSC will conduct bi-annual sales missions into the key feeder markets of San Francisco/Bay Area and Sacramento. VSC sales missions give stakeholders the opportunity to engage meeting planners and build relationships for future booking opportunities.

With the introduction of SLO CAL Connection, FY 2018/19 presents the first time all leads and business opportunities will be distributed via one streamlined, easy-to-use platform that gives stakeholders the opportunity to respond to leads more efficiently and to stay up-to-date with all of VSC's Travel Trade programs.

FY 2017/18 TRAVEL TRADE CALENDAR

FY Q1			FY Q2		
July	August	September	October	November	December
TRADE SHOWS					
		T&T Mission Southern CA	RVIA Pomona 5-14 VRMA National, Las Vegas 27-30	WTM London 11/5-10 NTA Wisconsin 5-8	CalsAE Sacramento 12-13 M&C Mission Sacramento
			CA RV Show 6-15 Pomona, CA		NTA 14-18 San Antonio, TX
SALES MISSIONS & FAM					
			Visit CA Canada		
Southern Cal* T&T		Northern Cal* M&C		M&C FAM	
PARTNER/MEMBER					
			Packaging Party		
FY Q3			FY Q4		
January	February	March	April	May	June
TRADE SHOWS					
T&T Mission Southern CA	Go West Summit Idaho 25-26 MPI Northern CA EXPO 26	M&C Mission Bay Area	VCA China Mission MPI Sacramento Sierra Nevada Trade Show	Black Diamond Sales Mission UK	IPW Anaheim 1-5
SALES MISSIONS & FAM					
	Visit CA Mexico	Black Diamond UK	Visit CA China		
	Northern Cal* M&C			Southern Cal* Sales T&T	* Co-op Opportunity

EARNED MEDIA + PUBLIC RELATIONS

Earned media presents the opportunity for VSC to gain exposure for SLO CAL that would be cost prohibitive in advertising, as well as to gain brand strength through third-party endorsements from journalists and influencers. VSC has partnered with TURNER Public Relations domestically and with Black Diamond in the UK and Ireland on earned media strategy. These firms will assist the in-house communications team with media relations, ultimately supporting VSC's larger marketing goals and initiatives through consistent exposure in key target publications.

PROACTIVE PITCHING Leveraging lifestyle and travel trends, new products and compelling experiences, VSC will craft and showcase SLO CAL's unique destination stories and news through targeted proactive pitching. VSC will develop a pitch calendar to enable regular, strategically driven outreach to key media publications, ensuring year-round, consistent coverage reaching target audiences.

MEDIA FAMILIARIZATION TRIPS VSC will conduct targeted, highly qualified media/influencer visits to the destination throughout the year. The itineraries will include a range of activities, accommodations and attractions relevant to their readership, and will visit multiple SLO CAL destinations to tell a holistic county story. Some visits will be on an individual basis, while others may be in the form of a group press trip.

IN-MARKET DESKSIDE APPOINTMENTS Meeting with members of the media to showcase the destination and pitch story ideas in person has been highly effective in growing awareness of SLO CAL with media in major markets. Such meetings are conducted around other media events and in FY 2018/19 are planned for the UK, New York City, Denver, Seattle, Los Angeles (at IPW), San Diego and San Francisco with support from TURNER and Black Diamond.

VISIT CALIFORNIA MEDIA RECEPTIONS The VSC public relations team will participate in select Visit California Media receptions in San Francisco, New York, Canada and other markets (TBD) where dozens of writers congregate to learn about California travel and hear SLO CAL pitches.

REPORTING/TRACKING TURNER and Black Diamond provide monthly tracking of public relations efforts and earned media mentions of SLO CAL. VSC utilizes the new SLO CAL Connection to efficiently communicate mentions and media opportunities to partners and the new CRM to track the quality and value of the articles.

LOCAL MEDIA While driving demand for SLO CAL travel experiences is at the top of the list for the VSC earned media team, the value in sharing VSC news, developments and programs with the local community cannot be overlooked. VSC will conduct regular outreach to local and regional media to inform the local public on the organization and to keep the importance of tourism top-of-mind for both residents and community leaders.

CRISIS COMMUNICATIONS While never pleasant, crisis communications are an essential piece of the VSC earned media toolkit. VSC will maintain and update its crisis communication plan, while continuing communications for the Highway 1/Pfeiffer Canyon Bridge closure and preparing for the road reopening. VSC will continue to update and share critical information and communication tools for partners throughout the rebuilding process.

PRESS MATERIALS VSC will keep the existing press kit relevant by updating the documents based on changing industry trends, news from partner DMOs and new story ideas, while also reviewing background information and facts on SLO CAL to ensure accuracy. In addition, VSC will distribute regular press releases to be used as support in proactive pitching and sharing of news from the destination. All of this, along with materials from key partners, will be maintained in the online media room on SLOCAL.com.

PARTNERSHIPS To further elevate the SLO CAL brand on a national scale and build the content library, VSC and TURNER continue to pursue marketing partnerships with like-minded brands. Such partnerships enable VSC to reach key consumer audiences and generate awareness of the destination through a partner's trusted brand and established audiences.

OWNED MEDIA

THE NEW SLOCAL.COM

VSC's new digital destination experience, SLOCAL.com, is aimed to enhance customer and partner relationships by facilitating the user's journey through strategically curated brand stories. Aerial videography of the county's scenic treasures and breathtaking photography come together in a sleek design that reinforces the brand's motto, "Life's Too Beautiful To Rush®."

SLOCAL.com comes to life thanks to Simpleview Inc., the leader in destination marketing technology. Along with a new domain name and web design, SLOCAL.com features a user interface that enables local tourism partners to edit and update their business profiles in a more efficient way. SLO CAL Connection is the hub where partners can find VSC updates, interact with the community, engage with VSC's marketing opportunities and curate their brand for the world to see.

DESTINATION TRAVEL NETWORK (DTN)

With the new online platform, VSC's non-lodging tourism partners are able to take advantage of sponsored placements on SLOCAL.com. DTN, VSC's website marketing partner and a division of Simpleview Inc., helps partners increase their online exposure by showcasing their website listing through upgraded web placements and targeted advertising on SLOCAL.com.

UGC PLATFORM

Chute, a user-generated content (UGC) platform, allows VSC to engage with consumers and grow social media awareness. Through Chute, VSC can source and acquire use rights to photos and video and visitors to SLOCAL.com are able to interact with the SLO CAL social world as part of a seamless navigation experience. VSC's DMO partners can also utilize Chute at a reduced cost through a 58% negotiated discount co-op.

SLO CAL AMBASSADOR PROGRAM

Influencer marketing continues to be a powerful tactic and brands take advantage of these agents to reach consumers they otherwise wouldn't be able to. In 2018, VSC selected six SLO CAL Storytellers from five local destinations to become brand ambassadors, each representing at least one of SLO CAL's three personas. Using the slogan "Are you #SoSLOCAL?", 62 people from across the county submitted their photos, videos and blogs to demonstrate why they should "rep their region." The first iteration of the program is an institutional effort to build synergies in the community and connect local audiences with the SLO CAL brand. Storytellers will be venturing out on pre-planned excursions to experience a variety of activities ranging from food and wine to family and adventure. VSC will use the six Storytellers to generate content, celebrate the SLO CAL lifestyle and grow awareness through an expanded audience and six authentic voices.

INDUSTRY PROMOTIONS

VSC continues to look for creative ways to engage audiences through social media programs designed to bring awareness to key stakeholders and travelers alike. Restaurant Month in January and California Wine Month in September are two promotions that seek to bolster local food and wine businesses while engaging audiences through unified social media messages.

STRATEGY-DRIVEN CONTENT

The annual strategic content plan includes calendar-driven topics, signature SLO CAL events, partner promotions and monthly blog posts centered around our research-driven target personas: Perfect Pairings, SLO CAL Crafted, Cultured Class, Active Adventurer and Mom to the Max. This content is designed to be evergreen and to tell authentic stories, provide useful facts and inspire travel. In FY 2018/19, VSC will be regularly procuring visual and video assets to proactively support the planned content and expand the ever-growing asset library.

OFFICIAL SLO CAL VISITOR MAGAZINE

Designed to be an eye-catching visual showcase and to read like a lifestyle periodical, the SLO CAL Visitor Magazine features local tourism partners, compelling travel stories and local profiles. One of the key opportunities for SLO CAL businesses to reach tens of thousands of visitors, the magazine consists of all native content-style advertising that naturally engages the reader and allows for deeper storytelling.



PARTNERSHIPS

VSC seeks to engage with strong regional and national brand partners to elevate the SLO CAL brand through mutually beneficial marketing and/or promotions activities. Ultimately, the goal is for the county, the partner and the consumer to find value such that:

- Consumer loyalty to one brand is extended to another
- Both partners are able to expand reach and enter into new markets
- Marketing spend efficiency is increased
- Visitors and consumers find value in the partnership

PARTNERSHIP OPPORTUNITIES

VSC is working with its partners at TURNER PR to seek co-branding partnership opportunities with local and national brands. Such strategic marketing partnerships will enable VSC to amplify the SLO CAL brand through content creation, influencers and promotions by leveraging strong online engagement. These co-marketing agreements build awareness through increased reach and add brand authority through key target personas.

PROMOTIONAL PARTNERSHIPS

SAVOR — A SAN LUIS OBISPO COUNTY EXPERIENCE

Partnering with area businesses, VSC has developed a branded, traveling destination experience, SAVOR—A San Luis Obispo County Experience, to promote the county at food, wine and lifestyle events in key markets. This event-within-an-event experience features SLO CAL destinations, chefs and restaurants, local foods and craft industries, such as wineries, breweries, farms and more. In addition to the event exposure, VSC's sponsorships include targeted marketing campaigns to past and current event attendees -highly qualified audiences with above-average household incomes and affinities for exceptional food and wine travel. For FY 2018/19, VSC will take SAVOR to Denver in September (tentative), the San Diego Bay Wine + Food Festival in November and Taste Washington in March.

BRAND PARTNERSHIPS

Brand partnerships are a great way to drive awareness to the SLO CAL brand in niche markets that align with VSC's marketing personas. In 2017, VSC hosted The Clymb in SLO CAL to generate content including everything from surfing and kiteboarding to coffee shops and farmers markets. The Clymb and its parent company, San Luis Obispo-based Leftlane Sports, are curators of outdoor adventure experiences, gear and travel stories. The partnership aimed to connect SLO CAL with a large, highly engaged audience in key markets and a following that matches the Active Adventurer persona. From this content collection trip, The Clymb produced blog posts which were included in email newsletters, email banners, social posts, web tile ads and an Instagram takeover from September to November 2017. The total estimated impressions topped 1 million and the estimated clicks and engagements exceeded 19K. VSC continues to search for brand partnerships that provide similar value, both on the content creation front and the ability to get the brand in front of targeted, loyal audiences.

EVENT PROMOTIONS

VSC partners with multiple organizations each year to support high-impact events that market to and draw guests from outside of the area to multiple destinations in SLO CAL through in-kind marketing promotion. In FY 2017/18, VSC helped to promote Cal Poly's Poly Parent Adventures and the 78th Annual Poly Royal Rodeo; the inaugural Wine Speak Paso Robles conference; the Central Coast Pro Tennis Open in Templeton and the SLO International Film Fest via Film SLO CAL. VSC will continue to seek unique, innovative and exciting visitor-focused events to support in the coming year, including hopes to bring AMGEN Tour of California back to the destination. VSC will expand its partnership with the Mid-State Fair for the 2018 season helping to promote the breadth of events, activities, concerts, concessions and things to do to increase attendance by fairgoers from out of the market and to lengthen their stays.





INDUSTRY PARTNERSHIPS

LOCAL AND CENTRAL COAST PARTNERS

VSC continues to collaborate closely with the seven DMOs within San Luis Obispo County including representatives of different communities on its Marketing Committee roster, along with the area wine associations and other key tourism groups. Regionally, VSC partners with the Central Coast Tourism Council on several media visits each year and Brooke Burnham, VSC's VP of Marketing, is on the CCTC board, ensuring SLO CAL representation.

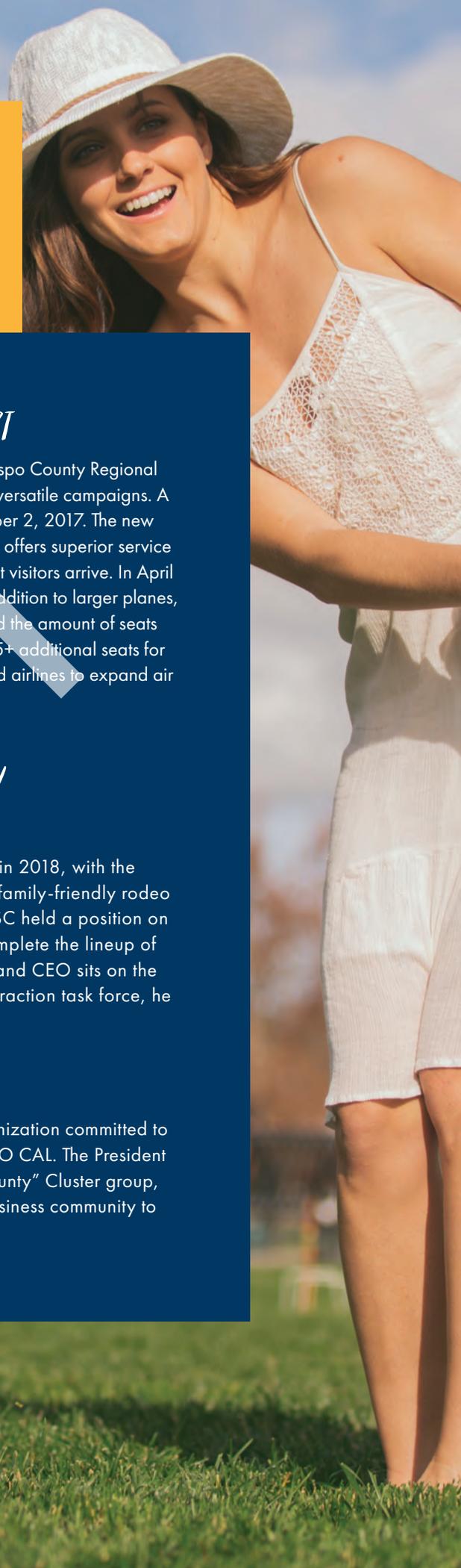
CALIFORNIA TOURISM PARTNERS

Visit California is the state-level DMO that develops and executes marketing programs that, in partnership with the state's travel industry, keep California top-of-mind as a premier travel destination. President & CEO Chuck Davison is a member of Visit California's Brand and Content Committee and Michael Wambolt, VSC's Director of Travel Trade, is part of the International Marketing Committee. VSC participates in many Visit California industry events and programs, which bring visibility to SLO CAL. CalTravel is California's travel and tourism industry association, protecting and enhancing its interests through advocacy, collaboration and education. VSC supports CalTravel's proactive Tourism Improvement District (TID) advocacy plan to defend industry funding and continue to move the needle for tourism in California. VSC's President & CEO, Chuck Davison, is on the Board of Directors for CalTravel and will serve as Treasurer for Executive Committee for the FY 2018/19.

REGIONAL AND NATIONAL PARTNERS

VSC is an active member of the U.S. Travel Association, Destinations International and Destination Marketing Association of the West; the organization also partners closely with the national DMO, Brand USA. These partnerships bring unique research and education programs, offer advocacy and resources and present exceptional marketing opportunities that allow VSC to efficiently reach international audiences.

STRATEGIC PARTNERSHIPS



SAN LUIS OBISPO COUNTY REGIONAL AIRPORT

VSC continues to serve as a strategic partner to the San Luis Obispo County Regional Airport supporting new markets with targeted media spend and versatile campaigns. A new and improved airport terminal opened its doors on November 2, 2017. The new 56,000-square-foot terminal supports new airport capacity and offers superior service to travelers, enhancing the SLO CAL experience from the moment visitors arrive. In April 2018, United Airlines added a second daily flight to Denver in addition to larger planes, amounting to 104 additional seats. United Airlines also increased the amount of seats to both Los Angeles and San Francisco, resulting in a total of 225+ additional seats for the fiscal year. VSC continues to work closely with the airport and airlines to expand air service development and target new flight markets.



CALIFORNIA POLYTECHNIC STATE UNIVERSITY (CAL POLY), SAN LUIS OBISPO

VSC partners with Cal Poly for Poly Parent Adventures and, in 2018, with the Annual Poly Royal Rodeo for the first time by promoting the family-friendly rodeo event on SLOCAL.com and social channels. Additionally, VSC held a position on the Ambassador Program roster for a Cal Poly student to complete the lineup of local brand ambassadors. Chuck Davison, VSC's President and CEO sits on the Economic Development Committee and the new business attraction task force, he is also a guest lecturer throughout the year.



ECONOMIC VITALITY CORPORATION (EVC)

The EVC is a regional nonprofit, economic development organization committed to developing a vibrant and sustainable economy throughout SLO CAL. The President & CEO of VSC, Chuck Davison, chairs the "Uniquely SLO County" Cluster group, advocating for additional air service and working with the business community to promote the lifestyle that tourism creates in SLO CAL.

FILM SLO CAL



Film SLO CAL aims to grow the overall awareness of SLO CAL as a filming location and to increase the overall economic impact in the region. By generating, supporting and managing production leads for motion pictures, TV and commercials, Film SLO CAL is positioned to act as the primary point of contact for all filming projects in the destination. By working in cooperation with county, city and state liaisons to continue to streamline the permit process, Film SLO CAL fosters new opportunities in cooperation with the community and reports on the overall economic impact filming projects bring to SLO CAL.

Goals

- Increase leads for filming in SLO CAL by 10% YOY
- Build media contracts specific to Film SLO CAL for pitching story ideas
- Proactively pitch and secure productions in SLO CAL
- Expand database of local crew and talent
- Increase total production direct spent YOY

Strategies

- Generate earned media to create awareness about the variety of opportunities to film in SLO CAL.
- Further develop communication channels to foster one-on-one relationships with target audiences.
- Strengthen relationships with the California Film Commission, Film Liaisons in California Statewide (FLICS) and other strategic partners to stay informed of industry happenings, new film incentives and overall trends in the film business.
- Leverage partnership with the San Luis Obispo International Film Festival to attract target audiences to the SLO CAL destination.
- Educate local tourism partners on the filming industry, the opportunity to attract film scouts and the filming industry's contribution to SLO CAL.
- Collaborate with county, city and state liaisons to turn leads into tangible opportunities, and to ensure reporting and tracking is up-to-date and accurate.
- Educate the local film industry on the role of Film SLO CAL and opportunities to partner.
- Seek and facilitate all inquiries regarding filming and permitting laws and policies within the county.



DRAFT

SLOCAL.COM