

OVERVIEW OF 2012-2013 FISCAL YEAR

Nanci Sikes
Executive Director



In reviewing this past fiscal year we realize that those small signs of an economic recovery would still be a slow and uneven process. (Had we known what lay ahead in August/September/October, we would have celebrated those single digit gains and rejoiced in the number of visitors we were able to meet, greet and assist with their travels.) As a destination marketing organization we have learned to be agile and to respond to volatile economic news from all of our global markets. However, what we would face in the Fall of 2013 would be unprecedented.

Due to our close proximity to the San Francisco Bay Area and Central Valley, Tuolumne County continues to be where northern Californian's come to play. Even the Southern part of our state contributed substantially to our walk-in guests and over night stays and we continue to draw from both national and international visitors due to many years of target marketing, advertising and promotions. Our tourism assets appeal to every visitor segment and include iconic Yosemite, historic state parks, natural wonders, arts & culture and world class recreation. From outdoor adventures to signature events and casino night-life, we truly can say, "we have it all!"



According to the Dean Runyan County by County Economic Impact Study for California, visitor spending was up in the county compared to the prior fiscal year. Total travel spending for 2011/2012 was \$181.6 million up from \$169.1 million the prior year. There was also a reported increase in tax revenues (state and county), with \$10.7 million collected in 2011/2012 as opposed to \$9.9 million the prior year. Employment related to tourism remained steady at 2,170, up from 2,160 the prior year. These employment numbers and visitor spending does not include Black Oak Casino Resort, the Hotel at Black Oak Casino Resort or the Chicken Ranch Casino in Jamestown, as these are indexed under "government" and not "tourism. We know these numbers will drastically decline in the current fiscal year due to both the Rim Fire and the government shutdown and closure of Yosemite National Park, Stanislaus National Forest and other federally operated recreation areas during August, September and October.

The Tuolumne County Visitors Bureau has administered a very aggressive marketing plan which combines traditional advertising, trade event participation and tourism technology. It reaches

(Continued on page 2)

Table of Contents

Pg 2	Vacation Planner
Pg 2	Internet Marketing
Pg 2	Social Media
Pg 3	Print Advertising
Pg 3	Trade Show Participation
Pg 3	Radio & Blog Media
Pg 3	Special Promotion
Pg 4	Vacationland
Pg 4	California State Fair Exhibit
Pg 4	Travel Media Relations
Pg 5	Visitor Center Operations
Pg 5	Regional Marketing
Pg 5	Community Partnerships
Pg 6	Industry Associations
Pg 7	Building new markets for the future
Pg 7	Conclusion
Pg 8	Film Commission Report

Highlights

Within this document are highlights of the fiscal year programs carried out by the Tuolumne County Visitors Bureau and partners. This report is based on the strategy outlined in a separate document, the Tuolumne County Visitors Bureau Marketing Plan.

(Continued from page 1)

out to the travel media, tour operators, meeting and incentive planners and those all important consumers (independent travelers) which account for the largest share of visitors to our county and our region. With assistance from our regional partners and the professionals at Visit California, along with our own TCEDA Tourism Recovery Committee, we will be doing even more in the months ahead to maintain and grow our tourism industry here in Tuolumne County.

For more than 28 years, TCVB has been the destination marketing organization for Tuolumne County and our mission statement clearly defines our goals. It reads as follows:

“The Tuolumne County Visitors Bureau provides its members and partners a coordinating structure in which to market, promote, network, educate and lobby in the furtherance of tourism in Tuolumne County and to insure that the county’s guests have a positive experience and return.”

With that in mind we would like to outline some of the many marketing, advertising and media programs and promotions the Bureau has launched or continued to support in the 2012 – 2013 fiscal year.

TUOLUMNE COUNTY VACATION PLANNER

The 2013 Tuolumne County Vacation Planner got a makeover and a new name this year. The name was changed from Visitors Guide to Vacation Planner to reemphasize the new Vacationland branding that the TCVB is now using.

The 2013 Vacation Planner features an incredible cover photo of Pinecrest Lake. Inside, there are larger photos as well as a fold out map of the County. The Vacation Planner continues to be in high demand. 90,000 copies were printed and are being distributed.

The Vacation Planner is used as a fulfillment piece for responses to advertising; it is handed out at domestic and international travel shows and is distributed at strategic locations throughout the Central Valley and the Bay Area. It can also be found throughout local businesses and of course at our Visitor Information Centers. The Vacation Planner is also viewable online with live links to member websites.



INTERNET MARKETING



Internet marketing remains a valuable tool for promoting tourism to Tuolumne County. This past year we have run paid campaigns on both VisitCalifornia.com and SanFrancisco.travel.com

Our partnerships with these two organizations have allowed us to do this at an affordable rate and we have grown our website audience due to this advertising. This year we have added sunset.com, viamagazine.com and xfinity.com to our internet line-up. GoogleAnalytics gives us a great idea of how these ads perform. Generally they are in the top 10 of referring websites to our website.

SOCIAL MEDIA

There is no doubt social media has changed the way information is received about destinations and the manner in which travel decisions are made. More and more, it is the hand-held device (smart phones) that guide us when we are at home or on the move. Regular posting to our visitors bureau Facebook, Twitter and Pinterest pages are as time-consuming as essential. Lisa Mayo, our Director of Sales & Marketing is directing more of her time in all aspects of marketing related to social media. This is our 2nd year to participate in Facebook ads. Lisa has also attended industry education training programs (Tech Summit), which is highly regarded for its cutting edge presenters and workshops We continue to see growth with 6,200 followers as of this year, compared to 1,100 the prior year.

PRINT ADVERTISING

The TCVB continues to run print advertising with both VIA and Sunset Magazine. Our ads in VIA Magazine can be seen on the Wine Country page. By being on the Wine Country page we have a much greater presence as it appears in all 2.5 million copies, not just in various regional issues.

The reader response from both VIA and Sunset continue to be significant. In addition, as Beyond the Bridges partners with San Francisco Travel we run an ad in the San Francisco Visitors Planning Guide. We also trade print advertising with the Calaveras Visitors Bureau and Sierra Seasons magazine.

TRADE SHOW PARTICIPATION

Trade show participation, both domestic and international continues to be an important element of our marketing plan. We are able to distribute large numbers of our Vacation Planners and get our media kits (on flash drives) into the hands of travel writers. Shows include media, consumer, tour operators and group/meeting travel planners. In most cases we are able to partner with others from either our County or our region. Here are the shows we attended in 2012/2013:

- LA Travel and Adventure Show – consumer and media show
- Bay Area Travel and Adventure Show – consumer and media show
- IMEX America (International Meetings Exchange) – trade and media show, Las Vegas
- Sunset Celebration Weekend – consumer show
- Go West – domestic and international tour operator – appointment-based
- International Pow Wow – domestic and international tour operators/media
- International Tourism Boerse (ITB), Berlin
- World Travel Market (London)



Lisa Mayo at Bay Area Travel Show

RADIO & BLOG MEDIA

We have continued our partnership with Big Blend Radio, based in Tucson, Arizona. We have an average of one show per month that we are on. Depending on the shows content that day we have the opportunity to bring on various guests for the live interviews, thereby being able to highlight the entire county. Topics include our State Historic Parks, Yosemite, four-season recreation and arts and cultural events.

Bruce Tepper, TCVB Marketing Consultant is also a regular contributor to the MyMotherlode.com blog which reaches foothill, central valley and northern California viewers. TCVB banner ads also rotate on Mymotherlode.com and link to our destination website, YosemiteGoldCountry.com.

SPECIAL PROMOTION



In January 2013 the first ever Tuolumne County Restaurant Week was held in conjunction with California Restaurant Month. There were seven local restaurants that participated in the Restaurant Week by offering diners a special \$25 pre-fixe dinner menu. This new promotion was quite successful with many of the restaurants and plans are underway for the 2014 Tuolumne County Restaurant Week.

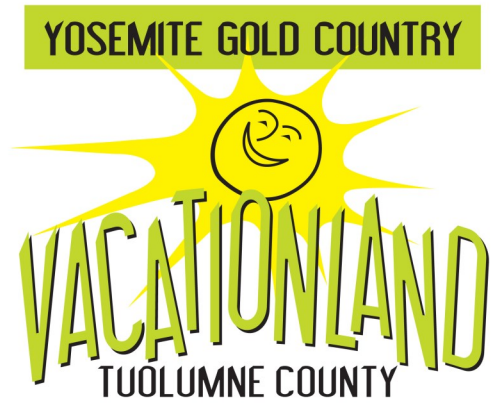
By having TCRW during California Restaurant Month we are able to benefit from many of their promotions without an increased marketing cost to us. We were included on their websites, dinecalifornia.com and received special mentions on their social media outlets.

VACATIONLAND

Last year as part of the Annual Report we introduced the new Vacationland brand that is a takeoff of a brand that began in the 1940's – Sonora Pass Vacationland. This time around the brand is inclusive of all of Tuolumne County.

This past year the new Vacationland brand went full speed ahead. At the new Vacation Station Visitor Information Center in downtown Sonora, we carry Vacationland branded merchandise from wine glasses, to koozies to t-shirts and chapstick. We have also begun the Vacationland Values discount program for visitors where they pick up a special key-tag at either of the two visitor centers and it gets them great deals at participating member businesses. It's a great way to get visitors moving around the county and perhaps staying longer than they might have otherwise.

We have had very good response from local residents and visitors alike about the Vacationland brand. We are working to brand the Chinese Camp Visitors Center with Vacationland as well.



CALIFORNIA STATE FAIR



2013 State Fair Exhibit

Once again the Tuolumne County Visitors Bureau participated in the California State Fair with an exhibit in the Counties Building and once again we brought home a Gold Award! In addition, we also brought home the Best Craftsmanship Award – this is only awarded to one county. Many thanks go to our awesome builder, Richard Bay, and his team and to our wonderful group of volunteers who make it extra fun for fairgoers to spend time at the Tuolumne County Exhibit.

This year's theme was *Food, Family and Fun*. We wanted to play off of our new Vacationland brand so the vision was to "build" a high country diner complete with fireplace and fake deer head above the fire place. Fairgoers would come to the diner to get information from volunteers and then they could walk behind the diner where they could view many of Tuolumne County's outdoor activities, including Yosemite and our quaint historic towns. In addition, there were wonderful vintage photographs from Dodge Ridge, nostalgic signs and old-fashioned outdoor gear. A video played numerous scenes from Tuolumne County's Vacationland. Nearly 700,000 guests attended the 17-day event.

TRAVEL MEDIA RELATIONS

This past year we updated our media kits to a flash-drive version. The flash drive is Vacationland branded. These are given to media at various travel shows where there are special media segments, and at the Visit California media reception. Additionally these kits were given as requested at various tour operator events including Go West. International PowWow (IPW) has a special media day, as does ITB, which the TCVB participated in. The media kit includes press releases, story ideas and high-res royalty-free photos.



We have also continued to build our partnership with TravMedia, one of the most respected public relations firms in the industry, based in New York. During the Rim Fire this partnership paid off as we were able to submit press releases to a database of 137,000 travel writers (both domestic and international) and make sure they had correct information on the status and whereabouts of the fire.

The TCVB also works closely with the Outdoor Writers Association of California and we look forward to hosting their Spring Conference in May 2014.

VISITOR CENTER OPERATIONS – NEW VACATION STATION

In May of 2013 the TCVB opened a new Visitors Center in downtown Sonora. To carry the branding theme on, the new Center has been named the Vacation Station. It is open daily to welcome guests. Visitors and residents alike will benefit from all the information. There is also Vacationland branded merchandise like t-shirts, sweatshirts, wine glasses, chapstick and much more! We are still waiting for signage to redirect visitors to the new Visitors Center. The old Visitors Center, across from the Fairgrounds is generally being used as TCVB business offices, but of course we still help the visitors being led there by the old signage!

We continue to operate a seasonal Visitors Center at the Chinese Camp Fire Station. It is imperative that we have this location as it is a means for us to direct visitors to Yosemite via Groveland and Highway 120 as well as direct visitors to Sonora via Highway 108.

Once again this year, the TCVB has supported the Yosemite Highway 120 Chamber of Commerce in their “Ranger Program” which began in May 2011. The YCC/Groveland Visitor Center provides office space for a National Park Service Ranger who is able to greatly assist visitors by providing information on Yosemite before they reach the Park entrance. This program runs through the summer season and allows for fewer back-ups at the entrance gate.

Walk in visitor totals were 3,699 for the Sonora Area Visitor Center and 14,286 for the Chinese Camp Visitor Center.



REGIONAL MARKETING

Regional marketing has always provided us with an outstanding opportunity for a broader reach both nationally and internationally. Your executive director serves on the executive board for the Gold Country Visitors Association and on the board of directors for the High Sierra Visitors Council. Tuolumne County is geographically placed in both of these regions and we benefit equally from both organizations.

GCVA and HSVC qualify for matching funds from Visit California (California Travel & tourism Commission), of up to \$50,000 annually. These matching funds must be used for regional marketing programs and the “match” is provided by dues paid by each member county (CVB) and through special partnerships and in-kind services. These are the funds which often allow us to participate in international trade events and media exchanges.



French FAM Tour

The matching funds have also allowed Gold Country to contract with a professional public relations firm, TravMedia, based in New York. Our representative, Susan Wilson, has assisted us with media leads and contacts we were not able to reach on our own. The High Sierra Visitors Council has utilized matching funds to contract with a highly regarded marketing and public relations firm in France (one of our growing international markets) and we have already hosted a familiarization tour for both tour operators and travel media. This successful itinerary allowed us maximum exposure to 11 qualified travel planners and members of the press. Both of these programs would be unaffordable on our own, but very realistic when partnership dollars are leveraged.

COMMUNITY PARTNERSHIPS—CO-OP MARKETING

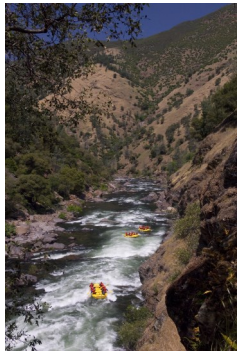
TCVB has administered a co-op marketing fund for the past 8 years and continues to set aside a portion of our annual budget for matching funds proposals. Many of our community groups and small non-profits have applied and received approval for advertising their events or attractions as long as the media selected reaches outside of Tuolumne County and will draw both day visitors and over-night guests. Some of the events to benefit in this last fiscal year include the Sonora Celtic Faire, the Mother Lode Round-up and Parade, All Hallows Fantasy Fair, Mother Lode Fair and “Explore Groveland”, a publication distributed in the central valley and bay area. In the current fiscal year we are matching funds on a ½ page ad in a National Parks publication called “Yosemite Journal”. This partnership is with the Yosemite Chamber of Commerce.



In this past fiscal year we have also established a special partnership with Larry Cope and the Economic Development Authority which allows for brain-storming of new ideas and cooperative efforts such as a county-wide video which could be used as a marketing tool for both of our organizations. Most recently, Larry has hosted a post Rim Fire “Tourism Recovery Task Force” which has representatives from each of the community chambers of commerce, the Tuolumne County Business Council, Black Oak Casino, Dodge Ridge Winter Sports Area and TCVB staff.

After one meeting, we were able to resurrect a Holiday promotion called “Small Town Cheer” which would immediately entice visitors to come back for any number of events beginning with Halloween or Thanksgiving and running through the week of New Years’. The cooperative efforts between the TCEDA and TCVB is an excellent match, especially with the recent

theme for the EDA which encourages clients to move their businesses to Tuolumne County and “work where you play”!



Our most important public partners are the County of Tuolumne and the City of Sonora. The 25% of TOT revenues which fund many of the marketing and advertising programs detailed above, would not otherwise be possible. Now more than ever, we need to let the world know that that our beautiful destination is alive and well and ready to welcome visitors from all parts of our state and from around the world. Our public partners have made all the difference in allowing Tuolumne County tourism to maintain a competitive edge.

Our most important private partners are you, our members, and without your loyal support we would not have the very effective public/private partnership that we call TCVB. The 350 plus businesses and associations which we feature on our website and in our annual Travel Planner, are who we must serve and promote to the best of our ability. We hope that this

Annual Report will provide useful information and that the future will see even more cooperative marketing opportunities between our marketing partners and TCVB.



INDUSTRY ASSOCIATIONS

TCVB has membership or reciprocal membership in the following tourism related associations:

Visit California – The California Travel & Tourism Commission
California Travel Industry Association
Gold Country Visitors Association
High Sierra Visitors Council
Western Association of Visitors & Conventions Bureaus
NTA – National Tour Association
U.S. Travel Association – Brand USA
DMAI – Destination Marketing Organization International



These organizations provide one or all of the following benefits: marketing, advocacy, education and grant funding for partnership programs.

A SMALL SAMPLING OF IMAGES TO ENTICE VISITORS



BUILDING BUSINESS FOR THE FUTURE—THE IMEX AMERICA SHOW

IMEX AMERICA A BIG WINNER FOR TCVB & PARTNERS

For the 2nd year in a row, we participated in the 3 year old IMEX (International Meetings Exchange) show at the Sands Convention Center in Las Vegas; Oct 15-17. This 3-year old show has rapidly become the largest event for meetings, events and incentive travel in North America with close to 2800 hosted buyers and another 1300 non-hosted buyers and media.

In addition to Lisa Mayo and Bruce Tepper, representing the bureau, we also had our same two hotel partners as last year with us: Black Oak Casino & Resort represented by Amanda Short and Julie Clark and Evergreen Lodge represented by Tara Stetz and Joe Juszkiewicz.

This year we had almost 3 times as many confirmed buyer appointments as last year along with a lot more drop in visitors to our booth interested in our area. Quite a few of them commented on the desire for a "new" meetings, incentives and events location to pair with San Francisco instead of Napa/Sonoma and Monterey/Carmel.

We also reached out to the media making contacts with editors and publishers of some of the largest meetings/events publications in the US as well as some of the Destination Management Companies (DMC's) in the Bay Area that are often in a position to sell Yosemite Gold Country.

Our meetings included buyers from Germany, Sweden, Spain, China and several other countries besides the US providing some great potential for us.

We also were able to get a half-page article on Yosemite Gold Country into the Trade Show Daily on the first day of the show. They were all over the convention center and available to every attendee. It's advertising we never could have afforded and put us in a great light.

Selling to the MICE (meetings, incentives, conferences and exhibitions) market is a long-haul process. It takes time to build up a reputation and get people here to see what we have to offer. Thanks to our great hotel partners, we were in a position to invite potential buyers and media personnel on the spot. We're looking forward to having them here and to expanding into this growing market place.



CONCLUSION

This Annual Report and supporting documents (visitor demographics, lodging tally, economic impact report, response to advertising), will be posted on our www.yosemiteGoldCountry.com website within the next 30 days.

FILM COMMISSION REPORT

The Tuolumne County Film Commission has a multipurpose role in attracting, facilitating and monitoring all modes of filmed production in Tuolumne County. The Film Commission utilizes a variety of marketing initiatives which proactively reach out to the production community through a number of avenues including direct marketing, an interactive web presence, personal sales calls, FAMs for qualified industry personnel, and exhibition at relevant trade shows and industry events, all in order to attract this lucrative business to our area.



In addition to the wide range of marketing efforts, once the decision has been made by a production company to shoot here, the Film Commission provides logistical support to aid with preproduction. From scouting services, photographing of potential locations, crew referrals, lodging, help understanding and obtaining permits, and assistance with local community and government, the Commission is there in a multitude of ways for these inbound productions.

In 2012-2013, Tuolumne County's filming related direct spend was **\$100,950** with a total economic impact of **\$297,802**. This included 15 productions and 80 shoot days. Five of these productions utilized the Tuolumne General Medical Facility for principal photography and one other used the facility for auditions and planning. The facility has also been scouted for three other productions, one of which has been delayed indefinitely and two others interested in filming at the facility later in the year.

FILM ACTIVITY HIGHLIGHTS

FEATURE FILMS

"Year One", Chris Brown Productions
"Lockhart", Lockhart Productions

SHORT FILMS

"Jasmine", Scene-One Productions

TELEVISION

"Ghost Adventures", SyFy Channel

COMMERCIALS

Hyundai

FOREIGN PRODUCTION

England - BBC - "Cary Stayner Murders"

France - "Gold Rush"

Netherlands - VPRO - "Gold Rush"



542 Stockton Street
Sonora, CA 95370
Phone: 209-533-4420
Fax 209-533-0956