

OVERVIEW OF 2013-2014 FISCAL YEAR

Nanci Sikes
Executive Director



Looking back on this “never to be forgotten” year, it is still difficult to believe that our County experienced so many disasters, big and small, in the span of several months. It all started with the devastating Rim Fire last August followed by so many unpredictable events including the government shutdown (Yosemite Park closure), the restricted access to many parts of our Stanislaus National Forest, a less than desirable winter which derailed our winter sports and snow play, the cancellation of our major event called the Strawberry Music Festival and last, but not least, an on-going drought which continues into our current fiscal year impacting our residents, our industries and many of our summer tourism destinations.

Now to the good news; this challenging year is behind us and our tourism is slowly but surely recovering! Many of our Hotels and attractions are reporting that their guests or visitors are returning and tourism revenues were up, at least in single digits.

TCVB expanded our advertising, marketing and promotions following the Rim Fire and many of those projects or programs funded from emergency reserves, are coming to fruition or already in play. We also received more than a little help from our friends, including the media relations team at Visit California and our global public relations representative at TravMedia.



Our friends at Visit California also featured Yosemite on the 2014 issue of the California Visitors Guide with 500,000 copies distributed world-wide, helping to remind all potential visitors that our iconic destination was still alive and well. Their support and generosity played a major role in our recovery efforts. Our Visitor Centers assisted 17,391 visitors in the past year and was able to track 28,472 over-night lodging guests throughout the County and City of Sonora. In response to reader and on-line viewer requests, TCVB mailed 6,661 Vacation Planners.

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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.

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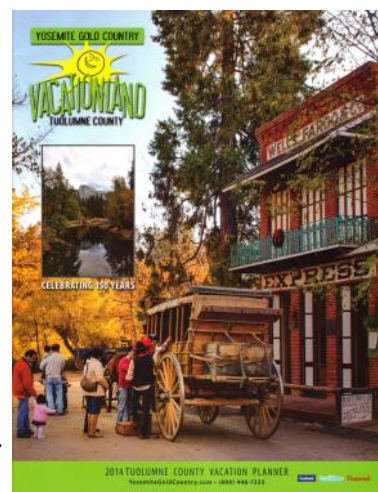
According to the Dean Runyan Associates Travel Impacts Study for California, our 2012-2013 direct visitor spending in Tuolumne County was \$191.9 million, up from \$181.6 million the prior year. Total direct tax receipts were \$10.9 million, up from \$10.7 million in 2011-2012. Direct employment was reported as 2,170. These employment numbers and visitor spending do not include Black Oak Casino Resort or Chicken Ranch Casino as these are indexed under “government” and not “tourism”.

As your retiring executive director, this will be my last Annual Report to the County of Tuolumne, the City of Sonora, our Board of Directors and our TCVB members & partners. I could not be more proud of this organization, its board of directors, its dedicated team members and our industry as a whole. I have had the unique opportunity to observe the growth and development of TCVB over the past 26 years as we evolved from a small visitor center operation to a fully developed destination marketing organization (CVB). This was not just a visitor's bureau journey but a community-wide effort. Tourism touches all of our lives by contributing to our local economy, adding to our tax base and enhancing our quality of life when our local retail, restaurants, theatres and attractions are supported by visitor spending. Tourism also enriches our daily lives as we bring the world to our doorstep and are reminded how fortunate we are to “live where so many others come to play”! I will always be grateful for the opportunity to lead our team and to serve with so many of our county and city leaders and partners on the multitude of boards and committees working to give us all a better future. Last, but not least, I congratulate our in-coming executive director, Lisa Mayo, who is the perfect fit for our destination and for our visitors' bureau. Her marketing and leadership skills will take us to new heights and beyond! My one wish is that our industry partners and community leaders will extend to her the same support and friendship you have so generously offered to me over all these many years.

We will now outline some of the many marketing, advertising and media programs and promotions the Bureau has launched or continued to administer in the 2013- 2014 fiscal year.

TUOLUMNE COUNTY VACATION PLANNER

- This year the Tuolumne County Vacation Planner features an enticing cover of Columbia State Historic Park. The photo was taken by (then) local photographer, Michael Sharps. 85,000 Vacation Planners were printed and distributed through travel shows and fulfillment from advertising, email and phone inquiries. This year we also had a distribution program that included key Bay Area locations like Peet's Coffee Houses, BART stations, Whole Foods store and many more places where large populations of potential visitors go.
- A Study of DMO Visitor Guides was recently initiated by the Western Association of Convention and Visitors Bureaus. The results of the study indicated that in spite of the increasingly digital world, printed visitor guides, particularly those published by DMO's – continue to be an important resource for both inspiration and trip planning for many travelers. Nearly 22% of American travelers report having used a DMO visitor guide in the year preceding the study either printed or digital versions. The TCVB has both.



INTERNET MARKETING



- This year we continued to run online ads in areas that we see direct website traffic from. Online advertising venues included Sunset.com, visitcalifornia.com and viamagazine.com.
- We also created Search Engine Marketing (SEM) campaigns that reached the “low hanging fruit” – those users that had already researched us or searched for our key words in some fashion on the internet. Our website visits increased year over year by 30% with much credit going to this approach.

SOCIAL MEDIA

As Social Media continues to grow, the TCVB continues to become more and more immersed in it. Facebook is our strongest social media platform with over 9400 followers. In addition to Pinterest, YouTube and Twitter, we have added Instagram to our social media cache. These are key outlets for us to tout the bounties of Tuolumne County.



MOBILE TECHNOLOGY



- This past year we sponsored a new app that the Union Democrat produced, "Explore the Mother Lode." We actively promote the app through distributing postcards (provided by the Union Democrat) and through a banner ad on our website. The app, in turn, promotes TCVB on each page driving more visitors to our website.
- For the past several months we have been working on mobile and tablet websites that will help both in-market and out of market visitors get a better view of Tuolumne County when they are using their devices as opposed to a desktop computer. This past year 21% of visitors to our site were on a mobile device while 15% were on a tablet. These numbers increase from month to month and we expect that trend to continue to grow which is why it is important that we have these designs.

PRINT ADVERTISING

The TCVB continues to print ads in VIA and Sunset Magazines. We continue to see increasing numbers in the amount of people who are requesting a Vacation Planner through these venues. Additionally we advertised in the Yosemite Journal this year and worked with the Yosemite Highway 120 Chamber of Commerce on a cooperative advertising section where they used TCVB Matching Fund dollars. Each of these publications provides us with reader leads which are fulfilled by sending a Vacation Planner to the reader.

TRADE SHOW PARTICIPATION

Domestic and international trade shows continue to be an important component of our marketing efforts. These shows provide an outlet for distributing Vacation Planners and gathering new media and tour operator leads. For most shows we take advantage of the opportunity to co-op with local and regional partners making our marketing dollars go further. The shows we attended this past year are:

- LA Travel and Adventure Show – consumer and media show
- Bay Area Travel and Adventure Show – consumer and media show
- International Meetings Exchange (IMEX America) – Meeting planner and incentive show -appointment-based
- Sunset Celebration Weekend – consumer show
- Go West – domestic and international tour operator – appointment-based
- National Tour Association Convention – domestic tour operators/ media – appointment-based
- International Pow Wow – domestic and international tour operators/ media – appointment-based
- International Tourism Boerse (ITB), Berlin (As part of Visit California delegation)
- World Travel Market (London) (As part of Visit California delegation)



Lisa Mayo at Bay Area Travel Show

RADIO & BLOG MEDIA

- Continue to partner with Big Blend Radio which is based in Tucson. The TCVB, along with our partners, hosted the mother/daughter team for several weeks in October 2013 and in January 2014. Their focus while here was keeping Tuolumne County top of mind for their audience in spite of the Rim Fire, government shutdown and weak ski season. The TCVB Executive Director and Marketing Team continue to be regular guests on their shows.
- Bruce Tepper, TCVB Marketing Consultant regularly contributes articles to the MyMotherlode.com blog through Clarke Broadcasting. TCVB ads rotate on MyMotherlode.com and link to our website, yosemitegoldcountry.com.

SPECIAL PROMOTIONS



- Small Town Cheer was revitalized through social media early-on during the holiday season of 2013. We wanted to promote all the great things to do in Tuolumne County during the holidays and beyond. This was a result of the Rim Fire Rebuild Committee.
- We held the 2nd Annual Tuolumne County Restaurant Week in January. This coincides with California Restaurant Month and allows us to piggy back on their Restaurant marketing promotions. The second year was not as successful as the first so we will be encouraging more feedback and planning from our restaurateurs for the 3rd Annual Tuolumne County Restaurant Week to be held January 18-24, 2015.
- Vacationland Values is a discount program for visitors where our members offer deals to visitors. The visitors obtain the cards by coming to the Visitor Centers and picking it up along with the discounts available. The information is also downloadable from our website.

CALIFORNIA STATE FAIR

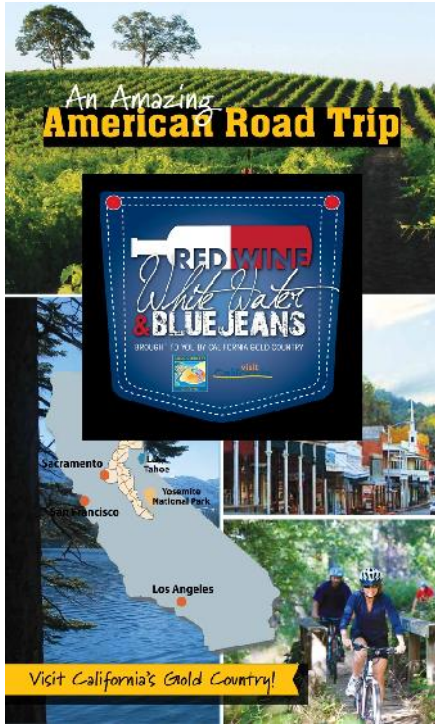
This year's theme was "From Our County to Your Table." The exhibit, build by Richard Bay – our long-time builder, featured three large animated bears who love Tuolumne County for so many reasons. The "Baby Bear" had a story about all the fun things he loves to do in Tuolumne County.

Tables were made to hold all the local products to display. The tabletops were all made from wood from salvaged logging from the Rim Fire Area. The wood was donated by Sierra Pacific Industries. In addition to donating, SPI also sponsored the exhibit along with the County of Tuolumne and Black Oak Casino Resort. We brought home a Gold Ribbon once again and the exhibit was a crowd favorite during the 17 day run of the California State Fair.



TRAVEL MEDIA RELATIONS

This year we hosted several travel media in Tuolumne County. In May of 2014 we hosted the Outdoor Writers Association of California Spring Conference. It brought nearly 50 writers and photographers to our area for three days to experience what the area has to offer. Outings included fishing, shopping, a historic tour, a farm tour, golfing, biking and much more. The event ended with a BBQ at Railtown 1897 State Park and an opportunity for the media to ride the train.



We hosted two French Familiarization (Fam) Tours that included tour operators and media from France. This was done through our French Representation (mN'Organisation) that is supported through one of our regional associations: High Sierra Visitors Council. In addition to fams, we have also hosted winners of various contests held in association with the French travel market.

In May we invited six journalists/photographers to be part of a four-day "Red Wine, Whitewater and Blue Jeans" fam. The trip began in Calaveras County with the Frog Jump. The media spent two days in Tuolumne County and their visit included a tour of Indigency Reserve and dinners at the National Hotel and the Groveland Hotel. Their first night stay was at the Best Western Plus Sonora Oaks. Their second night stay was split among the Hotel Charlotte, the Groveland Hotel and All Seasons Groveland Inn. The highlight of the FAM for the writers was rafting the Tuolumne with Sierra Mac. We have already received five articles from this FAM as well as photos and added social media reach through their channels.

We continue to build our presence with TravMedia, regularly submitting press releases and photos which get picked up by journalists throughout the country and beyond.

The most recent articles can be seen at yosemitgoldcountry.com/media.

VISITOR CENTER OPERATIONS

The Sonora Visitors Center, also the location of our Visitor Bureau office, has been remodeled inside and is now branded with Vacationland. New flooring, new paint and new displays have helped modernize this center. We continue to build the Vacationland brand at the Chinese Camp Visitors Center.

The combined number of visitors that have come into our Visitors Centers this past year is 17,377. The Chinese Camp Visitors Center sees the bulk of our visitor traffic with 14,036 logged visitors coming through. This number is 250 from 2012-2013. WE feel this slight downturn is a direct result of the Rim Fire and government shutdown. The Chinese Camp Visitor Center is crucial for directing visitors to enter Yosemite on Highway 120 as opposed Highway 49 and directing them to Jamestown, Sonora and beyond on Highway 108 when returning from Groveland and/or Yosemite. Both centers now carry more merchandise like books, t-shirts and other souvenirs that are proving to be quite popular with visitors.

The TCVB continues to financially support the "Ranger Program" at the Yosemite Highway 120 Chamber of Commerce Visitor Center. The program began in May 2011 and provides for a National Park Service Ranger who assists visitors by providing information on Yosemite before they reach the park entrance. The program runs through the summer season and helps traffic move more smoothly through the entrance gate.



REGIONAL MARKETING

Regional marketing has always provided us with an outstanding opportunity to reach both in-state and international markets. Your executive director serves on the Board of Directors for both the Gold Country Visitors Association and the High Sierra Visitors Council. Geographically, Tuolumne County is located in both of these regions and we benefit equally from both organizations.

Both GCVA and HSVC qualify for matching funds from "Visit California" of up to \$50,000 annually. To qualify, these matching funds must be used for region-wide marketing programs and the "match" is raised through membership dues paid by each of the counties (CVB's) and through special partnerships and in-kind services. These are the funds which often allow us to participate in international trade shows and media events.

These matching funds have allowed our Gold Country region to contract with a highly regarded public relations firm, to attend domestic trade events and to purchase 3 pages of advertising and advertorial copy in the California Visitors Guide & Travel Planner. The High Sierra Visitors Council utilized matching funds to continue our representation in France, to attend international trade shows and sales missions and to host a FAM Tour for both tour operators and travel media. Many of these programs are unaffordable on our own, but very realistic when partnership dollars are provided through "Visit California".



Gold Country, California ...priceless
gold country visitors association



COMMUNITY PARTNERSHIPS — CO-OP MARKETING



TCVB has administered a co-op marketing/advertising fund for the past 9 years and continues to set aside a portion of our annual budget for matching funds proposals from local tourism partners. Many of our community organizations 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. In the past fiscal year some of the events to benefit from this program include the Sonora Celtic Faire, the Mother Lode Round-up, Rodeo & Parade, the All Hallows Fantasy Faire, Mother Lode Fair, Explore Groveland and more.

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 in this report, would not otherwise be possible. Now, more than ever, we need to communicate that our beautiful destination is alive and well and ready to welcome visitors from all parts of the 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! Without your loyal support we would not have the very effective public/private partnership



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
San Francisco Travel (Destination Marketing Organization)
OWAC– Outdoor Writers Association of California

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

BUILDING NEW MARKETS FOR THE FUTURE—THE IMEX AMERICA SHOW

IMEX AMERICA A BIG WINNER FOR TCVB & PARTNERS

For the 3rd year in a row, we will be participating in the IMEX (International Meetings Exchange) America show at the Sands Convention Center in Las Vegas; Oct 14-16. This 4-year old show has rapidly become the largest event for meetings, events and incentive travel in North America with an anticipated 3000 plus hosted buyers and 1500 plus non-hosted buyers and media people. Last year the show attracted buyers from 44 countries, however a large majority of buyers are from North America.

Typically, meeting, event and incentive travel planners are working on business 1-3 years in advance so measuring results directly is quite challenging. As a result, tracking the effectiveness of the show is next to impossible as buyers rarely remember the source of the information they obtain and often share it with other colleagues who may not have attended the show at all. Based on advanced buyer appointment requests this year, however, we're confident this show is producing results for us.

Unlike previous years, this year, we are the only exhibitor branded with, "Yosemite" as part of our name. Since Tuolumne County is unknown outside of Northern California, we market ourselves as, "Yosemite Gold Country."



We have three primary target markets at the show:

- Meeting, event, incentive planners & social group organizers from around the world bringing 150 people or less. About 80% of the meetings business is groups of 25 or less.
- Destination Management Companies (DMC's) in the Bay Area as many of these group will pair a 2nd destination such as ours with a visit to San Francisco
- Global group travel oriented media outlets

LOOKING AHEAD FOR 2015

- Fall Radio Campaign with KNBR – Follow Me to Tuolumne
Campaign will promote lodging (at no expense to lodging partners) during off-peak time. The 10-day promotion will be run during Giants baseball game coverage in addition to regular KNBR programming. The campaign includes social media outreach, contests and a grand prize for a Tuolumne County getaway.
- Enlisted the help of PR Professional Susan Wilson for further outreach with media and tour operators alike. Susan is very well connected with San Francisco Travel and we are looking to work more with SFT as a jumping off point for visitors to Tuolumne County.

FILM COMMISSION REPORT

The TCVB continues to also be the Film Commission for Tuolumne County in spite of losing designated film commission funding and our Film Commissioner. Our Director of Sales & Marketing and Operations Coordinator have worked in tandem with the County and City to process film permits over the past year.



Film Permits that were processed and filming that took place over the past year include:

Chris Brown: "The Other Kids"

The History Channel: "10 Things You Didn't Know About" (based in Columbia)

Simone Knepper/Two Spoons Productions: "Her Name is Leah"

Evan Marshall/Cortina Productions "Museum Piece"

Ronald Morales: World Wide Photo Walk- Columbia

Jason Morris/Diablo Film Works: "Story of Eva"

The Travel Channel: "Ghost Adventures"

It should be noted that Tuolumne General Hospital has been a very popular film location in the past and we are no longer able to use it for filming although we continue to get many inquiries. We have had to turn approximately five productions away but do try to offer alternative locations to attempt to keep the filming within the County.

Director of Sales & Marketing attended a film rally at the State Capitol in August to promote AB1839 which increases the CA Film Tax credit to \$330 million a year for five years beginning in fiscal year 2015-2016. The underlying effect is to bring filming back to and keep it in California. It also increased the incentive for areas outside the "zone" (areas 30 miles outside of Los Angeles) by 5%. The Film Industry is very optimistic about the opportunities the passing of this bill will give all California locations including Tuolumne County.



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