



# AGENDA

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## Visit SLO CAL Board of Directors

### Visit SLO CAL Board of Directors Agenda

Wednesday, January 31, 2018

8:30 am

Embassy Suites

333 Madonna Road, San Luis Obispo, CA 93405

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

<b>ANNOUNCEMENTS</b>	<b>C. Davison</b>
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<b>CONSENT AGENDA - <i>motion required</i></b>	<b>C. Davison</b>
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3. Approval of Jocelyn Brennan’s Marketing Committee Application
4. Approval of Courtney Meznarich’s Marketing Committee Application  
*Staff will ask for Board approval of Marketing Committee applications from Jocelyn Brennan and Courtney Meznarich.*

<b>BUSINESS ITEMS</b>	<b>C. Davison</b>
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5. Destination Development Plan Presentations - *motion required*  
*The Board will hear consultant presentations for Visit SLO CAL’s Destination Development Plan and make a selection.*

### ADJOURN.

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

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

Jocelyn Brennan  
AG&GB Chamber  
800A West Branch  
Arroyo Grande, CA 93420

January 15, 2018

Dear Visit SLO CAL Board of Directors,

I am writing to express my strong interest in the VSC Marketing Committee. I am applying for this position because I am committed to seeing SLO County and more specifically South SLO County grow as a tourism destination in the state of California.

I have enjoyed the opportunity to work in the heart of San Luis Obispo County and Santa Barbara County business for the last four years.

I have had the privilege of working with 10 different Central Coast Chambers and understand how vital tourism is to our local economy and all businesses. Furthermore, I understand that the economic tides are shifting in light of the Diablo closure. Cities throughout the Central Coast, including Grover Beach and Arroyo Grande, will be joining together to develop regional economic strategies to grow economic opportunity. The tourism industry will be more important than ever in the coming years.

I will be working closely with the marketing for South County destinations and events and see the need for collaboration with the other efforts in the county.

Sincerely,

Jocelyn Brennan



## VISIT SLO CAL

### MARKETING COMMITTEE APPLICATION FORM

NAME OF APPLICANT: Jocelyn Brennan  
COMPANY: Arroyo Grande & Grover Beach Chamber of Commerce  
ADDRESS: 800 A West Branch Arroyo Grande CA 93420  
PHONE: (805) 489-1488 EMAIL: Jocelyn@aggbchamber.com  
TOTAL YEARS IN TOURISM INDUSTRY: combined 8 years

#### TOURISM-RELATED MARKETING EXPERIENCE:

My marketing experience has been limited to local events, social media, branding and press relations. This experience was related to my role as program director, legislative aide, district director and my current role as AG&GB Chamber CEO. Additionally, I own and operate an Air BnB in the unincorporated area of Arroyo Grande. Please see attached for more information.

#### Employment History

CURRENT EMPLOYER: AG&GB Chamber YRS OF SERVICE: began 1/1/18  
TITLE: CEO  
PAST EMPLOYER: California State Assembly YRS OF SERVICE: 1  
TITLE: District Director

#### Community/Board Involvement

ORGANIZATION: Arroyo Grande TBID TITLE: Administrator  
DATES OF INVOLVEMENT: 1/1/18  
ORGANIZATION: Cal Poly President's Local Economic Development Committee TITLE: Advisor  
DATES OF INVOLVEMENT: Begin 1/24/18  
ORGANIZATION: Arroyo Grande Public Art TITLE: member  
DATES OF INVOLVEMENT: 1/1/15-12/31/16

Individuals interested in serving on the Marketing Committee should send this **Application Form**, along with a **cover letter** and any background (**resume or list of key accomplishments** - no more than two pages total) to demonstrate their active role in marketing, branding, public relations or digital media as it relates to tourism in San Luis Obispo County, to [Brendan@SLOCAL.com](mailto:Brendan@SLOCAL.com). For more information, contact Visit SLO CAL at (805) 541-8000.

# JOCELYN BRENNAN

800 A West Branch   
Arroyo Grande CA 93420  
(805) 489- 1488   
jocelyn@aggbchamber.com 



## OBJECTIVE

Candidate for Visit SLO CAL Marketing Committee.



## RELEVANT EXPERIENCE

### District Director, 35<sup>th</sup> California State Assembly District

Managed District Office.

Developed community events.

Strategic communications.

Championed community issues.

Policy development.

### Legislative Aide, 4<sup>th</sup> District SLO County Supervisor Lynn Compton

- Served as a spokesperson for the Supervisor throughout the communities of Arroyo Grande, Oceano and Nipomo.
- Talking points, press releases, media statements, social media and fielded press inquiries.

### Children's Program Director, Calvary SLO, San Luis Obispo

- Rebranded & expanded the Children's program, improving program quality and increasing community engagement.
- Designed and coordinated all aspects of church and community outreach events including conferences, retreats, and large community outreach events at the Cal Poly PAC and Madonna Expo for up to 1,000 people.
- Managed program communications including brand design, content development for promotional materials, social media and marketing campaigns for events and programs as well as newsletter communications.

### Women's Program Director, Calvary SLO, San Luis Obispo

- Conference organizer and keynote speaker for several retreats, conferences, and special events to groups ranging in size up to 600.



## ACTIVITIES

- Arroyo Grande Public Art Committee
- 5 Cities Diversity Coalition
- California Landscape Contractors Association
- Leadership SLO Class 26
- Planning Committee, Prom for Jared Arroyo Grande 2015
- Fundraising Chair, Volunteer, Coastal Christian School, Arroyo Grande
- Western Association of Chamber Executives



**Attn: Brendan Pringle**  
**Visit SLO CAL**  
**1334 Marsh Street**  
**San Luis Obispo, CA 93401**

Re: Marketing Committee Application

To VSC Board of Directors and Staff,

I'm writing to inform you of my interest in participating on the Visit SLO CAL Marketing Committee. I'm a San Luis Obispo County native and tourism marketing professional, and I'm uniquely qualified to offer input and provide ideas to further the County's marketing goals.

As a SLO County native, I've developed immense pride for our region and a deep understanding of what makes it special, from the rural valleys of San Miguel to the dunes of Guadalupe. With this, I recognize the competing priorities amongst destinations in our County and will be sensitive to that fact when reviewing and giving feedback on the board's goals, objectives, strategies and tactics.

As account management supervisor at AMF Media Group (formerly Barnett Cox & Associates), I've had the pleasure of working on many DMO accounts including Morro Bay, Arroyo Grande, and presently San Luis Obispo. Collaboration between Molly Cano, the City's tourism manager, and our partner agency Matchfire has resulted in impactful campaigns and campaign strategies, increased transient occupancy tax, and award-winning ideas that have garnered the attention of the American Advertising Federation and the Visit California Poppy Awards.

I am ready and willing to attend scheduled marketing committee meetings and any additional responsibilities assigned to me. Thank you for your consideration,

**Courtney Meznarich**

A handwritten signature in black ink, appearing to read "Courtney Meznarich", written in a cursive style.

**Account Management Supervisor, AMF Media Group**



# Visit SLO CAL

## MARKETING COMMITTEE APPLICATION FORM

NAME OF APPLICANT: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

TOTAL YEARS IN TOURISM INDUSTRY: \_\_\_\_\_

TOURISM-RELATED MARKETING EXPERIENCE:

### Employment History

CURRENT EMPLOYER: \_\_\_\_\_ YRS OF SERVICE: \_\_\_\_\_

TITLE: \_\_\_\_\_

PAST EMPLOYER: \_\_\_\_\_ YRS OF SERVICE: \_\_\_\_\_

TITLE: \_\_\_\_\_

### Community/Board Involvement

ORGANIZATION: \_\_\_\_\_ TITLE: \_\_\_\_\_

DATES OF INVOLVEMENT: \_\_\_\_\_

ORGANIZATION: \_\_\_\_\_ TITLE: \_\_\_\_\_

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Individuals interested in serving on the Marketing Committee should send this **Application Form**, along with a **cover letter** and any background (**resume or list of key accomplishments** – no more than two pages total) to demonstrate their active role in marketing, branding, public relations or digital media as it relates to tourism in San Luis Obispo County, to [Brendan@SLOCAL.com](mailto:Brendan@SLOCAL.com). For more information, contact Visit SLO CAL at (805) 541-8000.



**Courtney Meznarich**

*Account Management Supervisor*

A SLO county native and proud Cal Poly Mustang, Courtney's a news room veteran with a knack for staying plugged in to the community and current events. She's gone from producing newscasts and managing reporters at KSBY-TV to producing results for AMF clients. She's been awarded for her work with Communicator, ADDY, and TELLY statuettes, and most recently helped the City of San Luis Obispo take home the coveted Visit California Poppy Award for its tourism campaign. Courtney stays connected outside of the office through her work with the SLO U40, Lifelong Learners, Glean SLO and Get on the Bus.

**Education:** Cal Poly, San Luis Obispo, Journalism, BS, 2009

**Awards & Commendations:** Ed Zuchelli Award for Outstanding Broadcaster, 2009; Certificate of Achievement in Journalism; San Luis Obispo Tribune "Top 20 Under 40," 2016; Visit CA Poppy Award 2016; American Advertising Federation Best of Show 2016.

**Certifications & Affiliations:** Former assignment manager, KSBY-TV; Paso Robles native and Cal Poly alum (local market familiarity); Hands-on experience in all aspects of marketing strategy development and production. PRSA member. Leadership SLO Class XXIII.

**Tourism Experience:**

Years of experience: 5 years

**AMF Media Group, (formerly BCA) 2018-Present**

*Account Management Supervisor*

**Barnett Cox & Associates, 2014-2017**

*Account Manager*

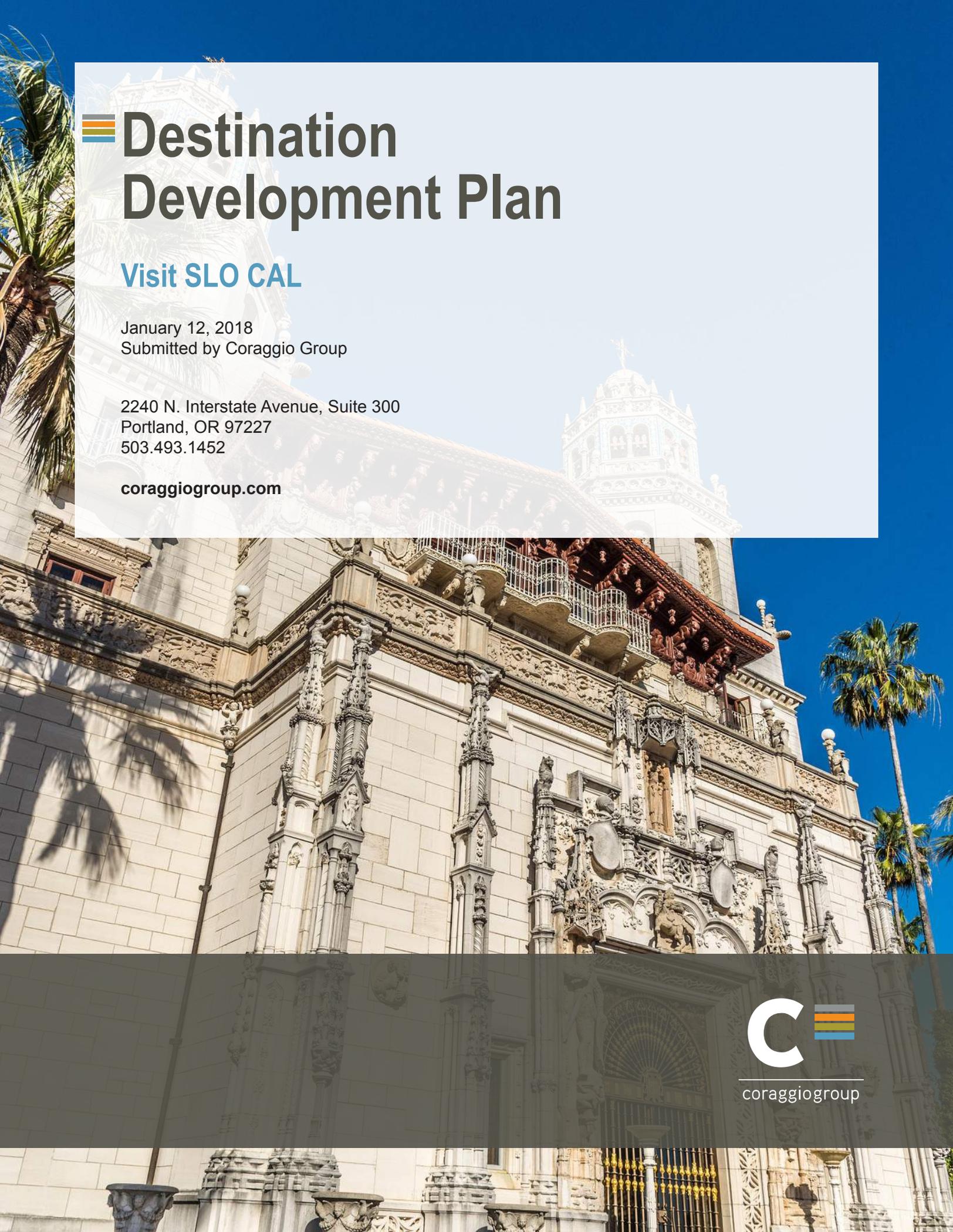
**Barnett Cox & Associates, 2012-2014**

*Account Coordinator*

**KSBY-TV, 2009-2012**

*Producer & Assignment Manager*

**Relevant Experience:** City of San Luis Obispo, *Marketing, Tourism Business Improvement District*; Arroyo Grande, *Marketing, Tourism Business Improvement District*; Morro Bay, *Marketing, Tourism Business Improvement District*; City of San Luis Obispo Government, *Public Relations and Communications*; San Luis Obispo County Farmers' Market Association, *Marketing*.



# Destination Development Plan

## Visit SLO CAL

January 12, 2018  
Submitted by Coraggio Group

2240 N. Interstate Avenue, Suite 300  
Portland, OR 97227  
503.493.1452

[coraggiogroup.com](http://coraggiogroup.com)



January 12, 2018

Chuck Davison  
President and CEO  
Visit SLO CAL

Dear Chuck:

If tourism in San Luis Obispo County is to be maintained in the long run, it will require decisions to be made today whose full effects might not be felt for a decade or more. No existing entity has been tasked with this work, but Visit SLO CAL has taken up the mantle and offered its leadership to complete a Destination Development Plan that will quantify San Luis Obispo County's capacity for tourism to prevent over-tourism, balance economic development with quality of life for residents, envision an ideal future state in terms of visitation and impact, identify key steps that can be taken in the short-and long-term to make that future a reality, and identify how success will be measured.

In order to accomplish this, you will need a team that understands the dynamics of San Luis Obispo County, has relationships with many of the key stakeholders, has the strategic thinking and analytic rigor to produce a credible plan, is able to incorporate the voice of the visitor, and is able to consider the physical development implications for a successful tourism future. We have assembled just such a team. Although I am a familiar face in San Luis Obispo County, I want to take this opportunity to introduce you to other members of our team, and the amazing skills and talents that they will bring to this process:

- **Michelle Janke** is a Partner at Coraggio, and one of the original members of our travel & tourism team. She is the calm and steady leadership presence on many a Coraggio project, and brings insights from a portfolio of projects spanning many industries.
- **Alexandra Reese**, Associate Principal, recently joined Coraggio from ECONorthwest, a leading economics firm in the Northwest. Her portfolio is filled with economic development studies, many centering around tourism as an important economic driver. At the same time, she is a keen strategist.
- **Colin Stoetzel**, Associate Principal, is the brains behind much of the data crunching we do at Coraggio. He has been instrumental in working with many of our DMO clients, particularly when working on larger-scale assignments such as state tourism plans.
- **Lindsay Gettmann** is Coraggio's sharp-eyed Visual Communications Specialist who will ensure that the final product of this planning process sings.
- **Bob Whelan**, Project Director at ECONorthwest, is an expert in modeling the economic impacts of industries on regional economies. He has a proven track record of providing actionable policy recommendations based on custom economic impact models for complex industries.
- **Martin Regge** is a Principal at NBBJ, a global architecture firm headquartered in Seattle. Martin and the rest of the NBBJ team were colleagues of mine for many years, and Martin is one of the most talented and thoughtful planners/urban designers I have had the pleasure to know. His large-scale planning efforts are particularly relevant for this project.

- **John Savo**, NBBJ Principal, is a versatile architect who has led projects as varied as port property redevelopments, public infrastructure, and the development of the Amazon corporate campus in Seattle.
- **Kim Selby**, NBBJ Senior Associate, is a planner and urban designer whose has particularly deep experience in planning work with public agencies, and a knack for building consensus from disparate stakeholder groups.
- **Arianna Howe**, Vice President for Client Services at Sparkloft, has extensive experience connecting visitor desires to destination needs at every scale.

Through the years, we have found that the human dynamics of planning are as critical as the process of planning. Failing to focus on the people produces a process that can feel like a forced march to the goal. On the other hand, failing to mind the process can result in fuzzy outputs or missed opportunities. We design processes that have an integrated focus on both, which will give you much more in the end—not only will you have an intelligent and data-driven Destination Development Plan, but you will also build understanding and trust that will support buy-in, and will enhance your ability to implement the plan.

Chuck, it's truly been a pleasure to work with you over the past couple of years to ensure that Visit SLO CAL has a clear and actionable Strategic Plan. As you know, Destination Development Planning is a relatively new trend in the travel & tourism space, and Visit SLO CAL will be a bit of a trailblazer in undertaking this study. Although this would be the second Destination Development Plan Coraggio has undertaken, we are confident that our combination of skills and experience—and especially our relationships throughout the San Luis Obispo County tourism industry—will result in a plan that is not only rigorous and data-driven, but supported and actionable as well.

We look forward to the possibility of working with you and your many collaborators to define San Luis Obispo County's longer-term future, and welcome any questions that you may have in the meantime.

Enthusiastically,



Matthew Landkamer, Principal  
Coraggio Group  
matthew@coraggiogroup.com  
503.493.1452



VISIT SLO CAL

# Project Approach



coraggiogroup

Winery & Tasting Room



Infused Wine

The Spirit of Wine



LONE MADRONE

WINE TASTING



## Project Understanding



San Luis Obispo County has grown rapidly in its sophistication around the development of tourism. Multiple DMOs are now thriving in the county, and increasingly these entities are collaborating to deliver on the promise of the tourism economy. Wisely, Visit SLO CAL has taken a leadership role in calling for a Destination Development Plan that will align tourism stakeholders, residents, and municipal officials on the importance of tourism to the County's economy and on the most important steps that must be taken in order for sustainable growth to occur in this sector.

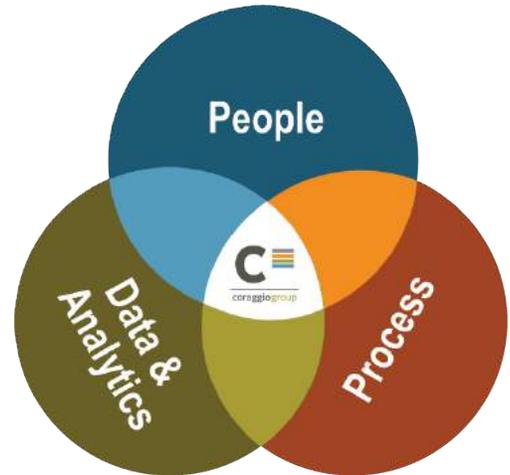
Although there is growing industry recognition of the need to think longer-term about sustaining tourism economies, not many DMOs—particularly at the scale of San Luis Obispo County—have invested the time and resources necessary to create such a plan. In this respect, Visit SLO CAL is a trailblazer.

The purpose of the proposed planning process is to:

- Make the case that tourism is a critical sector in the regional economy, and generate strategic buy-in from key partners
- Quantify San Luis Obispo County's capacity for tourism to prevent over-tourism
- Envision an ideal future state in terms of visitation and impact, balancing economic development with quality of life for residents
- Identify key steps that Visit SLO CAL and its partners can take in the short- and long-term to make that future a reality
- Identify how Visit SLO CAL will measure success

# Project Approach

This project lies at an intersection where **people and process** meets **data and analytics**. We firmly believe that the quality of the process will determine the quality of the results. A poor process excludes key stakeholders, doesn't bring the right information into the room, and ultimately results in a plan with sub-par recommendations that sits on the shelf. A **great process**, on the other hand, engages the right **people**— those with important insights and responsibility for implementation— from the start. It must be engaging and productive. Finally, it must bring **data and analytics** into conversations in a productive manner— honoring the insights and perspectives of those in the room, while allowing the entire team to validate assumptions and honestly evaluate potential actions.



A great process doesn't happen by accident. It takes:

- A solid project plan to chart the course
- Great facilitation to ensure that planning sessions are both engaging and productive
- Data and analytics experts who understand what questions to ask, how to get good answers through stakeholder engagement and research, and how to bring that information into the room in a productive manner
- People and process experts who can track progress and implement course corrections.

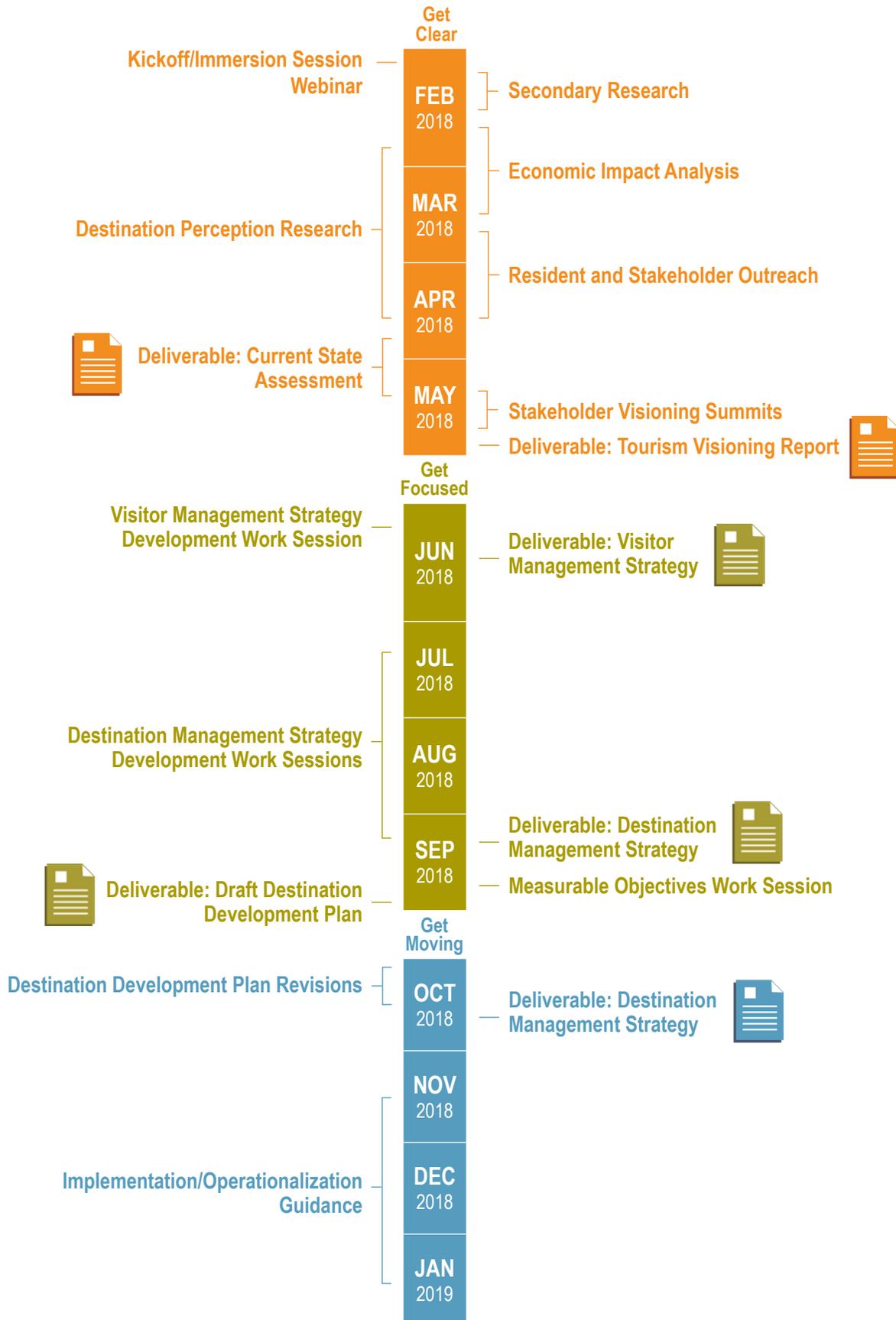
We have put together a team which, collectively, encompasses the requisite capabilities and experience to design and execute a successful Destination Development planning process for Visit SLO CAL.

**The process, as we envision it, is summarized in the graphic on the following page:**





# Process Overview



# Final Deliverable: Destination Development Plan



The final deliverable for this project is a **Destination Development Plan**, which will include the following components:



## Executive Summary

- The Vision for SLO CAL: Tourism in 2038
- The Current State of the Tourism Industry in San Luis Obispo County
- Visitor Management Strategies
  - Visitor Volume
  - Visitor Experience
  - Resident Experience
- Destination Management Strategies
  - Tourism Zones
  - Place-Making Characteristics
  - Tourism Asset Development Strategies
  - Support System Development Strategies
- Ongoing Plan Management
- Measurable Objectives

# Scope of Work

To establish and maintain positive momentum and transparency from start to finish, we have organized our approach to this project within our three-phase **Get Clear**, **Get Focused** and **Get Moving** framework as outlined below and described in the following pages.



## Phase One: **Get Clear**

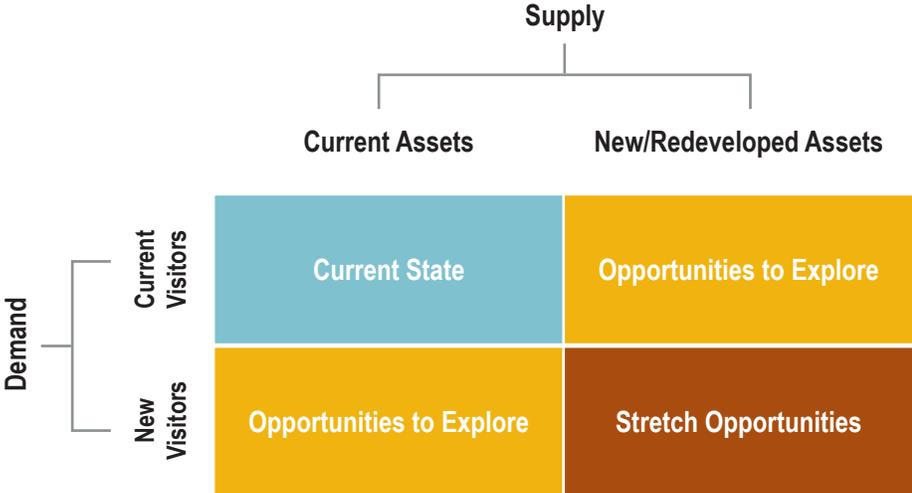


The Get Clear phase sets the stage for a successful planning process by aligning on key project goals, identifying planning inputs, setting baselines, and developing a vision of the future. The final work product for this Phase will be a Tourism Visioning Report. That report will provide a holistic overview of the tourism industry in San Luis Obispo County today, and articulate a vision for the future of the industry.

The Current State Assessment, the product of the first four steps in this Phase, provides a holistic overview of the tourism industry in San Luis Obispo County today. We will structure this overview similar to a market analysis. We will first characterize existing demand and supply—and where they meet—then identify and qualify opportunities (see the graphic below). We will explore opportunities to augment existing assets, develop new assets, and improve supporting infrastructure and services that would have a catalytic impact on tourism.



We will use both secondary and primary research to complete the current state assessment. Our secondary research will include significant data collection and analysis by both ECONorthwest and Coraggio (see pages 10-11). Our primary research will include destination perception research by Sparkloft (see page 12) and outreach with visitors, residents, and other stakeholders (see page 13). We include residents for two reasons: First, locals are a destination’s greatest ambassadors, and a major factor in shaping the visitor experience. Second, residents can have unique insights on challenges and opportunities impacting quality of life, many of which also impact the visitor experience.



**Kickoff/Immersion Session Webinar**

We like to begin all our projects by having a meaningful conversation with our clients about what project success looks like, how we will get there, and what potential obstacles we may encounter along the way.

We also want to use this time to compile a list of background information that is available. Visit SLO CAL and its partners in this project undoubtedly have valuable analysis and background documents, and we will use these to begin to identify key themes and trends, map influences for the plan, and highlight topics for discussion and areas that need clarification. These topics will help establish an environmental baseline and provide the information necessary to have a more rigorous and directed discovery phase.

To best utilize the budget, and because we have existing relationships with you and your key stakeholders, we propose that this initial kickoff session happen via video-conference. We would expect Chuck and key team members from Visit SLO CAL, as well as your Board chair, to participate.

**Secondary Research**

Following the Immersion Session, we will begin our current state assessment work with a scan of existing research. The purpose is to capture all existing research and analysis on tourism demand, supply, and opportunities. The table on the next page provides a snapshot of the information we will endeavor to collect, and from where we might collect it.

	Area of Investigation	Potential Data Sources
<b>Demand</b>	Visitor demographics	Local CVBs Local attractions ECONorthwest
	Local visitor statistics	Local CVBs Local attractions Smith Travel Research ECONorthwest
	Visitor preferences, spending habits	Visit SLO CAL Brand Lift Survey Visit SLO CAL Share-of-Wallet and Demographic Study Visit California: Travel Impacts by County Claritas MyBestSegments U.S. Census Consumer Expenditure Survey Other industry reports (e.g. Longwoods, US Travel)
	Factors that impact perception	Local CVBs Visit SLO CAL Feeder Market Awareness Study Economic analysis (we have collected many such reports through our work with other destinations)
<b>Supply</b>	Tourism asset inventory and performance: attractions, overnight accommodations, cultural assets, visitor services, events, etc.	Local CVBs TripAdvisor Airbnb (via AirDNA tool) Smith Travel Research Eventbrite Local attractions
	Supporting infrastructure and services: transportation system, the business climate, public safety, etc.	Municipalities and relevant departments Local chambers of commerce Local attractions

Of course, not all of this information will be available from existing sources. We will gather the information about economic impacts from the work done by ECONorthwest in the next step, and we will gather information about visitor perception and preferences through the research done by Sparkloft and the engagement work done by Coraggio in later Get Clear steps.

### Economic Impact Analysis

An economic impact analysis estimates the economic benefits –output, jobs, wages, tax revenues – that a project or industry brings to its community. Those benefits may be direct, indirect, or induced. Direct impacts equate to the output, jobs, wages, and tax revenues that result from spending by tourists at local businesses. When those businesses “re-spend” that money on supplies, rent, employees, services, etc., they create indirect impacts. When the owners and employees of these businesses spend their income, they create induced impacts.

ECONorthwest will build an economic impact model of San Luis Obispo County to estimate the total economic impacts of tourism. An economic impact model uses data on industry activity (e.g., spending by tourists), business census data, and other statistics to play out the ripple effects of local spending and employment to arrive at the total economic impacts.

Two facets of this study make it complex. First, tourism is not technically its own industry; it describes a customer base that spends its money at several industries, like museums, restaurants, gift shops, and hotels—so we must build our own input matrix to approximate the local tourism industry. Second, only a portion of the spending at businesses in these industries comes from tourists. So, we must use industry data to calculate the portion of spending solely attributable to tourists.



ECONorthwest will share the results in a report on the Economic Impacts of the Tourism Industry on San Luis Obispo County written for a general audience. They will retain a copy of the model, analysis workbooks, and data so that updates may be conducted expediently in future years.

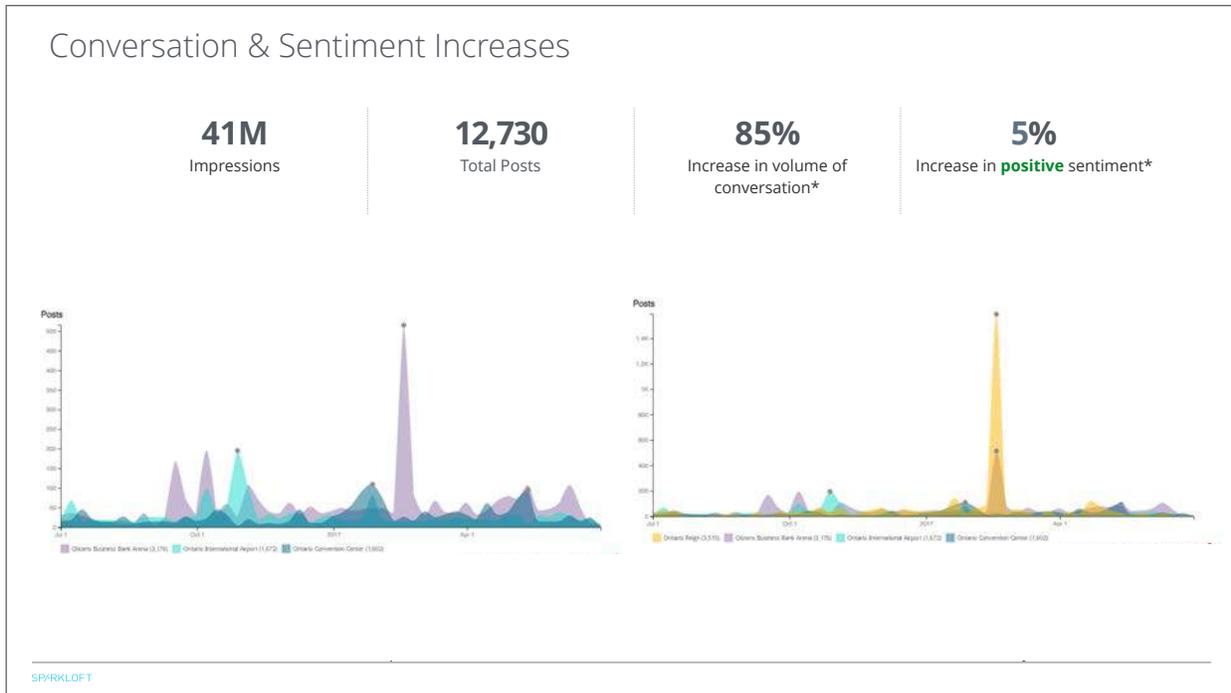
### Destination Perception Research

We believe including the voice of visitors and locals in your long-term destination planning is crucial. Working with our partners at Sparkloft, our team will conduct visitor and local sentiment analysis directed at the issues relevant to the long-term development of the destination, such as:

- Who is currently most passionate about the County?
- Which products and experiences resonate with the intended audience?
- How might the County differentiate itself in the future?
- Are there infrastructure elements they find lacking?
- What characteristics of place are most important to them?
- Are there visitor patterns that could help us identify special tourism zones in the County to inform development considerations, including some that might not be on the radar of local tourism stakeholders?

This analysis will leverage social media to target respondents while they are in-market to ensure we get the most accurate and timely impressions, but at a fraction of the cost of a physical intercept study. We will also passively collect information via geotagged social media posts, and will benchmark these sentiments against one or two competitor markets. Visitor patterns are influenced by the existing marketing of the destination, which could introduce a confirmation bias to these data points. To counteract this, we will also look for smaller patterns that seem significant and might be useful to the larger conversation—in later town halls, focus groups, visioning summits, and planning workshops.

### Visitor Sentiment Insight Sample ©Sparkloft



## Resident & Stakeholder Outreach

Tourism activity causes both positive and negative impacts to quality of life for residents, businesses and municipalities alike. Each of these groups can provide a variety of opinions on the continued development of San Luis Obispo County as a destination and the potential impacts that accompany it.

In service to this, we will concurrently engage stakeholders in two parallel groups: Residents and Businesses/ Municipalities:

**Resident Town Halls and Survey:** We will use the resident town halls and survey to learn about residents' hopes and concerns for tourism development—and growth in general, with a particular focus on testing to see how they experience tourism in positive and negative ways—information that we will use to inform the identification of tourism zones later in the process. Using our change management tools, we will also seek to understand levels of change readiness, or where pockets of resistance may exist—information that will inform your execution and communication strategies. To reach residents via survey, we will rely on getting a random selection of residents from municipal utility lists (where we can gain permission), physical distribution of invitation cards at locations frequented by a variety of residents in different portions of the County, or by “pushing” surveys to local social media users. We will host three town halls in the northern, central, and southern portions of the County.

**Business & Municipality Survey and Focus Groups:** This outreach will include Visit SLO CAL's staff and direct stakeholders, municipal DMOs, Unincorporated SLO County TBID (CBID) representatives, County and municipal elected officials and staff members, representatives of the Economic Vitality Corporation, Cal Poly, Chambers of Commerce, the County Airport, SLO COG, tourism-related businesses, and others, to understand what challenges and opportunities they face when thinking about the long-term development of San Luis Obispo County. For budget efficiency, we will work to schedule these focus groups during the daytime on the same days as the evening town halls. Our focus groups will be mainly used to reach DMO stakeholders, industry stakeholders (hotels, assets, attractions), and municipal groups, while the survey will be distributed more broadly to the tourism-related business stakeholders such as restaurants and retail establishments.





### **Deliverable: Current State Assessment**

We will synthesize the insights from the previous steps into a holistic overview of the current state of the tourism industry in San Luis Obispo County. Our research will answer the following questions in each area:

#### **Demand**

- **Visitor Trends**  
How many visitors come to San Luis Obispo County each year? What share come for the day, and what share stay overnight? How does visitation vary seasonally? How do these trends compare to global, national, and regional trends?
- **Visitor Segments**  
What are the different characteristics – locations, ages, household incomes, spending behaviors – of our visitors? What are the appropriate visitor segments based on this information?
- **Interests**  
What are the interests that draw visitors to San Luis Obispo County today? How do we anticipate these interests changing over time?
- **Competitive Landscape**  
What other destinations are in direct competition with San Luis Obispo County for visitors, and what do we know about how they are likely to develop in the future?

#### **Supply**

- **Tourism Assets**  
What programs and events, attractions, activities, entertainment and nightlife, cultural assets, and other amenities – both public and private – are available to visitors? Who provides these programs, products, and services to visitors? What do we know about their performance? How has this landscape changed over time?
- **Tourism Infrastructure**  
Where does our tourism infrastructure do a good job of supporting tourism, and where does it fall short?
- **Service Providers**  
What public agencies and private businesses provide these various products and services to residents? What are their needs?

#### **Opportunities**

We will synthesize the demand and supply analyses to determine what's working well and what isn't. As we identify opportunities, we will use the framework illustrated on page 10 to classify them—it's easier to move an existing visitor to a new asset, or to draw new visitors to an existing asset, than it is to draw new visitors to a new or redeveloped asset. While some "Stretch Opportunities" may be explored in the Get Focused phase, we will focus mainly on those "Opportunities to Explore" that are more realistic.

The finalized Current State Assessment will serve as the foundation for the Stakeholder Visioning Summits.



## Stakeholder Visioning Summits

Because the Destination Development Plan looks much farther out than a strategic plan, we need to envision what San Luis Obispo County will look like—perhaps 20 years into the future—in terms of both visitor experience and physical aspects of the destination. Because this plan needs to be sensitive to the needs of your constituents and the interests of San Luis Obispo County quality-of-life, stakeholders need to be included in this visioning effort. These stakeholders may include Visit SLO CAL’s staff and direct stakeholders, municipal DMOs, Unincorporated SLO County TBID (CBID) representatives, County and municipal elected officials and staff members, representatives of the Economic Vitality Corporation, Cal Poly, Chambers of Commerce, the County Airport, SLO COG, tourism-related businesses, and interested community members.



Image taken at a recent Stakeholder Visioning Summit

Using data from surveys and analysis, we will facilitate two lively and inclusive sessions—in different parts of the County—that will generate ample fodder for the development of long-term vision for tourism in San Luis Obispo County. A portion of these meetings will focus on visitor expectations and experience, while another part will focus on the physical aspects of the destination. While the stakeholders will be asked to contribute input, we won’t ask them to finalize the vision—that’s for the planning team (identified in the next phase) to decide based on the insights we glean.



### Deliverable: Tourism Visioning Report

Based on everything we have learned in the Get Clear phase, we will produce a Tourism Visioning Report that encompasses the results of the previous steps in the Get Clear Phase:

- The Case for Investment: The Economic Impacts of the Tourism Industry in San Luis Obispo County
- The Current State of the Tourism Industry in San Luis Obispo County
- The Long-Term Vision for Tourism in San Luis Obispo County

This report will be designed to be shared with any member of the public who is interested—a useful tool to keep stakeholders and residents engaged in the process, and an opportunity for them to see their influence on the planning.

## Phase Two: Get Focused



In the Get Focused phase, we will use everything we learned together in the Get Clear phase to shape major components of our Destination Development Plan. At the beginning of this phase, we will work with you to identify and enlist a planning team that will work with us throughout the remainder of the project. This team of 6-10 members will include key Visit SLO CAL team members, Board Members, and Stakeholder Representatives. The six work sessions in this phase will determine the strategic direction of San Luis Obispo County as a destination, and will strive to incorporate or complement existing plans from key partners and stakeholders.

### Visitor Management Strategy Development Work Session

This workshop will be a chance for the team to develop an initial framework for what kinds of Visitor Management recommendations the plan will make. We will reference what we learned from the Visitor Sentiment Analysis, and will look at Visitor Management through four lenses:



- **Visitor Volume**—What is the desirable range of visitor volume? How will that volume be distributed throughout the year, and geographically?
- **Visitor Experience**—What are the qualities of a consistent visitor experience we want San Luis Obispo County to deliver?
- **Resident Experience**—How do we want residents of San Luis Obispo County to experience tourists and tourism promotion strategies—What tools will we use to shape how we attract visitors to San Luis Obispo County?

We will support these discussions with data and research from the Get Clear Phase to ensure that the decisions align with what we learned about visitor trends, visitor and resident preferences and perceptions, and opportunities and challenges.



#### Deliverable: Visitor Management Strategy

We will compile everything we learned in the Visitor Management Strategy Session into this document that will give recommendations for how San Luis Obispo County should approach the management of its visitor load over time. This will include recommendations on prioritization and phasing, recognizing that some moves need to happen first to set the stage for sustainable tourism development.

## Destination Management Strategy Development Work Sessions (4)

The practical and tactical portion of the Destination Development plan is critical to its success. All the great ideas in the world can't become reality without taking a careful look at what else needs to be in place for this future to come to pass. We will work with our urban planning partner, NBBJ, in two of these four workshops to zoom in on the physical development implications of the plan. These work sessions will identify:

- **Tourism Zones**—What are logical groupings of tourism areas within the County, what infrastructure needs are unique to each zone, and what assets or attractions exist in each zone? What visitor sentiments apply to each zone, and how do residents feel about tourism in each zone? What change management implications arise from these zones and what we know about resident sentiment, and what steps should be taken to address those implications?
- **Place-making Characteristics**—What qualities of place should our Tourism Zones embody? What principles should guide the development we hope to shape? What actions are recommended to shape development?
- **Tourism Asset Development Strategies**—What levers might the County or specific municipalities pull to guide development along the desired path? Are there incentives to be offered in some places, and disincentives in others? These strategies will consider actions Visit SLO CAL, municipalities, local businesses, and strategic partners will take to add or improve the attractions, facilities, programs / events, cultural assets, entertainment / nightlife, and lodging that comprise the tourism industry in San Luis Obispo County.
- **Support System Development Strategies**—What actions will Visit SLO CAL and its partners take to improve the support systems that enable the tourism industry to thrive? Key areas of consideration include:
  - » **Transportation and infrastructure**—Will the development we recommend create new challenges for transportation systems in the county or exacerbate existing challenges, and what mitigating measures would we recommend? What other infrastructural needs should be addressed to support tourism over time?
  - » **Tax Structures/Incentives**—How can San Luis Obispo County and municipal governments use their authority to create programs to encourage the development we desire?
- **Ongoing Plan Management**—How will ongoing decision-making related to this Destination Development Plan occur, and who will be responsible?
- **Support Networks**
  - » **Political Will**—Do we have the necessary support from those in elected or influential positions to steer our development, what is the likely future for such political support in San Luis Obispo County, and what steps can be taken to ensure sustainable support?
  - » **Business & Industry Support**—Where will we have support from our major businesses and industries, and where must we look to gain support?
  - » **Public Support**—What parts of our plan may be challenged by the public, and which parts may be embraced? What do we need to do to build greater support and ongoing goodwill for tourism? How do we address over-tourism sentiments that may be growing?

There will inevitably be more strategy ideas than there are resources to do them, so one of the most important aspects of these work sessions will be the decision-making framework. Once the planning team has identified potential strategies, we will lead them through a process to identify evaluation criteria, evaluate and compare the potential impact of strategies, and prioritize the right set of strategies that are both impactful and financially feasible.





### **Deliverable: Destination Management Strategy**

We will compile everything we learn in the Destination Management Strategy Sessions into this document that will complement the Visitor Management Strategy through detailed recommendations related those items that are necessary to support a sustainable tourism economy. Like the Visitor Management Strategy, this will include recommendations on prioritization and phasing.

### **Measurable Objectives Work Session**

In our experience, the single most critical factor for success in implementation is the willingness of an organization to set crystal-clear measurable Objectives, and then hold themselves accountable to them. We will partner with you in this work session to identify key measures we will look to, and to develop initial targets for those measures. These Objectives will be the yardstick by which Visit SLO CAL will measure the development of the county as a destination over the long-term horizon of the plan. As we design these Objectives, we will strive to balance the ongoing economic contributions of tourism with quality of life measures for residents.



### **Deliverable: Draft Destination Development Plan**

We will work closely with you to assemble a draft document that will serve as a “straw man” for further revisions. We will aim for this document to be mostly right—you might say 85%—enough so that there is real content, but not so complete that it isn’t able to flex and change. We will then work with you to conduct a limited and strategic roll-out of the draft to key stakeholders for feedback. The feedback we receive will allow us to finalize the plan.

### **Visit SLO CAL’s Destination Development Plan will include:**

- Executive Summary
- The Vision for SLO CAL: Tourism in 2038
- The Current State of the Tourism Industry in San Luis Obispo County
- Visitor Management Strategies
  - Visitor Volume
  - Visitor Experience
  - Resident Experience
- Destination Management Strategies
  - Tourism Zones
  - Place-Making Characteristics
  - Tourism Asset Development Strategies
  - Support System Development Strategies
- Ongoing Plan Management
- Measurable Objectives



## Phase Three: Get Moving



The Get Moving phase will focus on organizing the outcomes of the Destination Development Planning process into a final document that will communicate effectively to your many stakeholder groups. It will include presentations of the draft plan and the final plan, as well as guidance to Visit SLO CAL as you begin implementation of the plan.

### Destination Development Plan Revisions

We will work closely with you to refine the report based on the feedback received on the draft, taking care to make good decisions that honor those whose efforts went into planning, while also recognizing legitimate issues raised in the review period.

The final Destination Development document has to speak to many audiences for many years to come. For this reason, it is important that a lot of care goes into the production and branding of the finished document, and our in-house visual communications specialist will take the lead on document production to ensure that the result is a handsome document with the gravitas to inspire confidence in its recommendations.



### Deliverable: Final Destination Development Plan Presentation

We will prepare a presentation to share with Visit SLO CAL and key stakeholders in person. The purpose of this meeting will be to gain final acceptance of the document and its recommendations.

### Implementation/Operationalization Guidance

Once the document is finalized, we will work with you to design a rollout strategy that will communicate the spirit and substance of the plan to your many stakeholder audiences. This will include partnering with you to create a communications strategy that defines different communications for each major audience (residents, stakeholders, partners, elected officials), and also provides guidance to those influencers who will be communicating about the plan on our behalf taking into account our change management observations from our stakeholder outreach. An additional task to support efficient implementation will be communicating the completed plan and its intent to those who will be responsible for ongoing governance.



## Proposed Investment

The work described in this proposal results in a proposed all-inclusive not-to-exceed budget of **\$202,863.89** as itemized in the table below. If selected for this project, we will work with Visit SLO CAL to re-apportion the budget as necessary to ensure that we are best meeting the needs of your organization and your budget requirements, and will finalize an agreed-upon budget as part of contract negotiations.

### Administrative Fees

We have included a 3% administrative budget to cover administration, printing, print production, and other expenses.

### Terms

All activities are invoiced on a monthly basis and are due net 30. Travel will be billed at cost and is estimated at \$19,500 for this scope of work, including flights, hotel, in-market transportation, and meals.

Phase of Work		Task Subtotal
Get Clear	<ul style="list-style-type: none"> <li>• Kickoff/Immersion Session Webinar</li> <li>• Secondary Research</li> <li>• Economic Impact Analysis</li> <li>• Destination Perception Research</li> <li>• Resident and Stakeholder Outreach</li> <li>• Deliverable: Current State Assessment</li> <li>• Stakeholder Visioning Summits</li> <li>• Deliverable: Tourism Visioning Report</li> </ul>	\$115,257.23
Get Focused	<ul style="list-style-type: none"> <li>• Visitor Management Strategy Development Work Session</li> <li>• Deliverable: Visitor Management Strategy</li> <li>• Destination Management Strategy Development Work Sessions</li> <li>• Deliverable: Destination Management Strategy</li> <li>• Measurable Objectives Work Session</li> <li>• Deliverable: Draft Destination Development Plan</li> </ul>	\$75,635.48
Get Moving	<ul style="list-style-type: none"> <li>• Destination Development Plan Revisions</li> <li>• Deliverable: Final Destination Development Plan Presentation</li> <li>• Implementation/Operationalization Guidance</li> </ul>	\$11,971.18
<b>Project Cost:</b>		<b>\$202,863.89</b>





VISIT SLO CAL  
Project Team



## About Our Team

For Visit SLO CAL, we've assembled a team of Coraggio's top consultants paired with experienced and talented partners to deliver a destination development process that incorporates necessary perspectives on strategic planning, tourism trends, economic development, place-making, urban development, and visitor sentiment:



Project Leadership and Management, Strategic Planning, and Tourism Trends



Economic Development



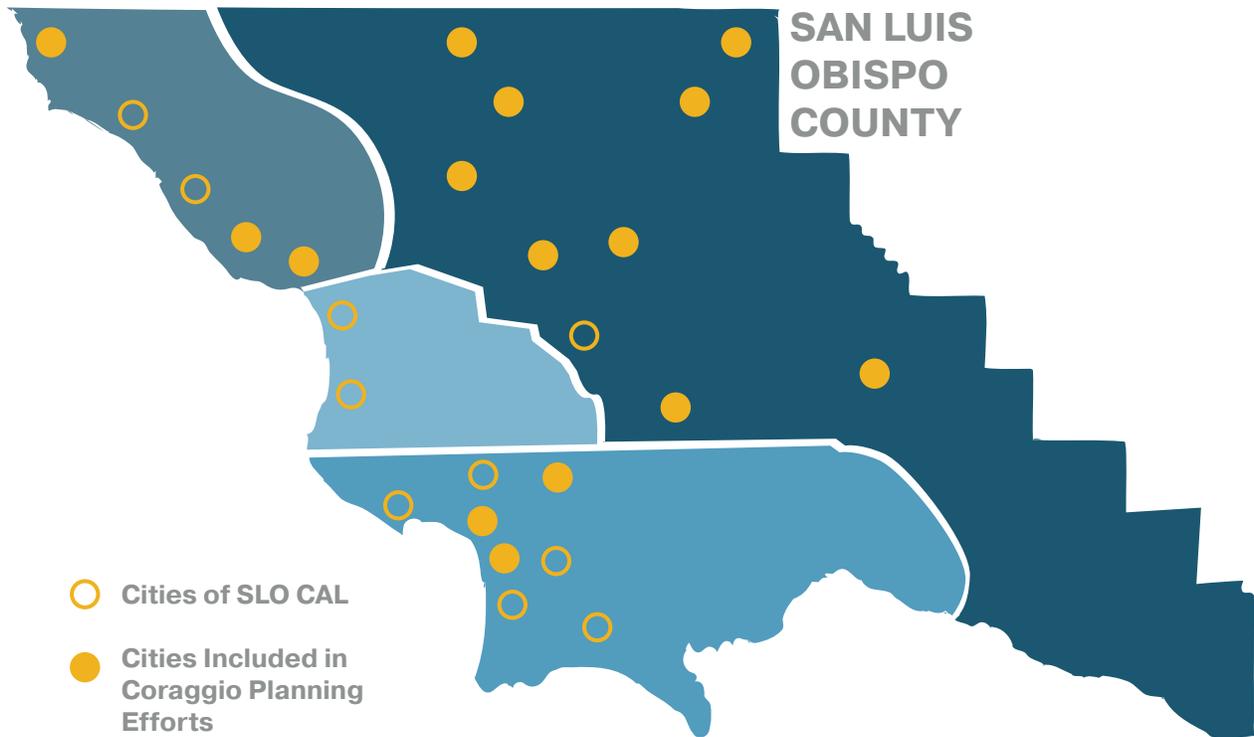
Place-Making and Urban Development



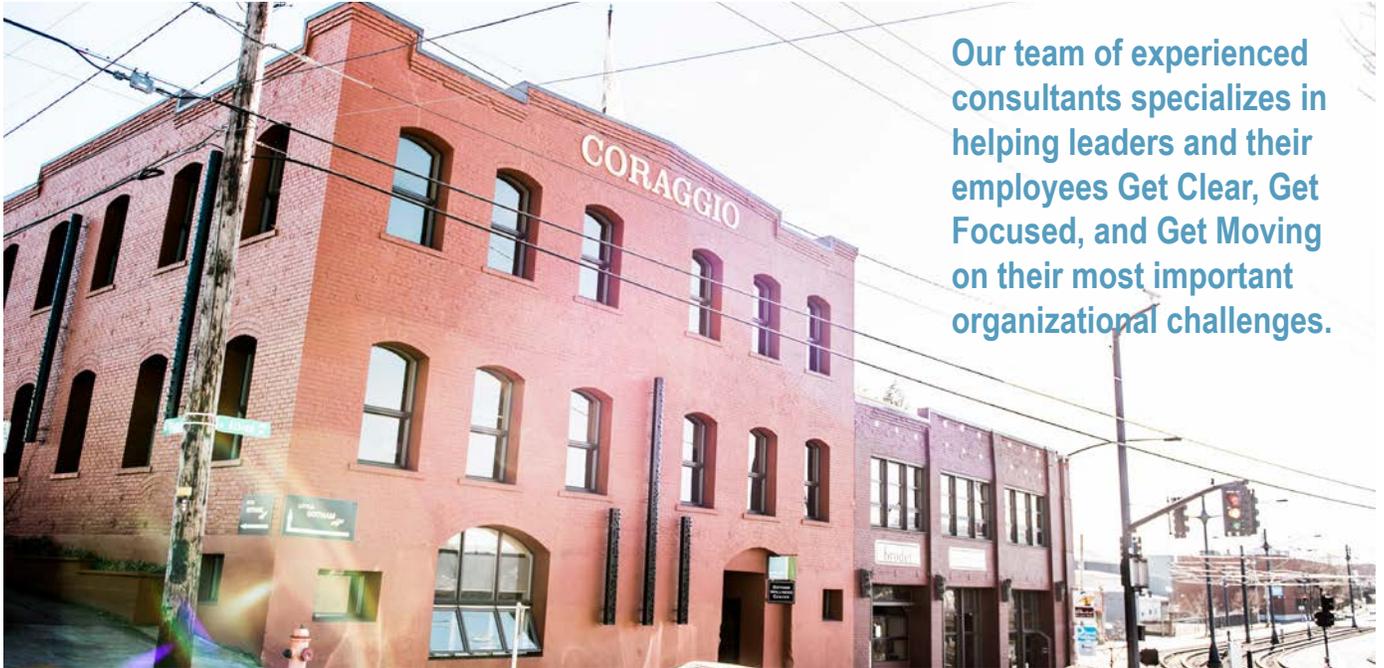
Visitor Sentiment

## We Know San Luis Obispo County

Coraggio understands San Luis Obispo County and has established relationships with many of the key stakeholders whose input will be crucial for the success of this project



# About Coraggio



Our team of experienced consultants specializes in helping leaders and their employees Get Clear, Get Focused, and Get Moving on their most important organizational challenges.

Since 2005, our consultants at Coraggio have been helping leaders envision their organization's future, create exciting plans, and foster the agile teams they need to get there. We've developed bold strategies, supported big organizational changes, inspired smarter ways of working, and engaged those whose voices needed to be a part of the conversation. Our Portland-based team is an eclectic band of thinkers, bringing an unusual blend of leadership experience, business acumen, and creativity to inspire breakthrough thinking for our clients.

We work in a lot of fields, but there's a common thread to all of our work—the spirit of Coraggio. If you haven't experienced a consultancy like ours before, that's because there isn't one.

## A few of our Destination Marketing Clients:



# Coraggio Research & Analytics Experience

Our proposed team includes an economic development specialist, *Alexandra Reese*, as well as a research and data analyst, *Colin Stoetzel*, both of whom bring years of experience analyzing travel and tourism data for city, state and private organizations.

## Alexandra Reese

### Associate Principal, Coraggio Group

Alexandra has completed five economic development strategic plans that included target industry analyses, stakeholder engagement, and policy evaluation and selection. Several of these plans—those for Grants Pass, Tacoma, and the Athletic and Outdoor industry— included travel and tourism data.

- **City of Salem Strategic Plan—Salem, OR.** Developed a strategic plan, transition plan, and governing processes for the City of Salem.
- **Grants Pass Economic Development Strategy—Grants Pass, OR.** Produced a joint economic development strategy for the City of Grants Pass and Josephine County, OR.
- **Tacoma 2025 Strategic Plan—Tacoma, WA.** Developed a strategic plan for the City of Tacoma.
- **USDN Sustainable Economic Development Toolkit—Portland, OR.** Developed a sustainable economic development framework and toolkit for use by municipal sustainability directors and economic development professionals for the Urban Sustainability Directors Network.
- **Athletics and Outdoor Industry Study—State of Oregon.** Completed an industry strategy for the A&O industry in Oregon.

She has also identified and evaluated the potential for increased travel and tourism on state-managed lands. This work involved the identification of opportunities that would be compatible with other land uses and conservation targets, visitor and revenue forecasts for each opportunity, and a brief assessment of next steps to make those opportunities a reality.

- **Oregon State Forests Assessment of Alternative Revenue Sources—Salem, OR.** Analyzed six alternative revenue sources to determine the revenue potential on state-owned forestland for Oregon Department of Forestry.
- **Idaho Conservation Market Rent Study—Boise, ID.** Evaluated the supply and demand for ecosystem services on state trust lands in Idaho for the Idaho Department of Lands.

## Colin Stoetzel

### Associate Principal, Coraggio Group

Colin has completed worked for state Travel & Tourism strategic plans that included stakeholder engagement, survey design, focus groups, interviews, and data collection and analysis, strategic visioning, planning and implementation, organizational assessments and process improvements.

- **Travel Oregon—State of Oregon.** Developed a state-wide strategic tourism plan that included process improvement and operational planning work.
- **Explore Minnesota—State of Minnesota.** Developed a state-wide strategic tourism plan.
- **South Dakota State Tourism—State of South Dakota.** Developed a state-wide strategic tourism plan.

He has also completed stakeholder engagement, survey design, focus groups, interviews, data collection and analysis, strategic visioning, planning and implementation and organizational assessments for city tourism organizations and state-agencies.

- **Los Angeles Tourism and Convention Bureau—Los Angeles, CA.** Employee and Board Engagement Study.
- **Visit West Hollywood—West Hollywood, CA.** Developed a city-wide strategic plan and TBID strategy.
- **Greater Ontario Convention and Visitors Board—Ontario, CA.** Developed a strategic plan for a multi-city region.
- **Business Oregon (state economic development agency)—State of Oregon.** Strategic Planning for state-wide economic agency that included rigorous work with current and future-state economic analysis.
- **Energy Trust of Oregon—Portland, OR.** Data collection, analysis and value stream mapping for multiple process improvement engagements.



## Project Partners



ECONorthwest is a consulting firm based in the Pacific Northwest that specializes in economics, finance, and planning. We understand that businesses and governments face difficult decisions about how to make the best use of limited resources. We help our clients make thoughtful, data-driven decisions using tools and methods that meet the highest standards of best practice. At the core of everything we do is applied microeconomics. This perspective allows us to fully understand—and effectively communicate—the benefits, costs, and tradeoffs associated with any decision. Our consultants have advanced degrees in a variety of fields, including economics, planning, and public policy; and work on projects ranging from strategy to implementation. On these projects, we provide a range of services, including business economics and modeling, natural resource economics, fiscal and economic impact analysis, land-use planning, policy analysis, urban and regional planning.



NBBJ is a different kind of design practice, one that helps our clients drive innovation by creating highly productive, sustainable spaces that free people to live, learn, work and play as they were meant to.

The world's leading organizations look to our experts to help them design environments that disrupt the status quo and effect real, meaningful change at all levels. Named among the top 10 most innovative architecture firms by Fast Company two years in a row, we make news by partnering with like-minded companies including Google, Amazon, Samsung, Microsoft and Tencent. Our clients also include institutional leaders such as Cambridge University, Cleveland Clinic, Massachusetts General Hospital, NYU Medical Center and Stanford University.

Founded in 1943, NBBJ has locations in Beijing, Boston, Columbus, Hong Kong, London, Los Angeles, New York, Pune, San Francisco, Seattle and Shanghai. Our global network of “renaissance teams” includes 700 researchers, strategists, nurses, architects, anthropologists, planners and interior designers who generate ideas that have a profound and lasting impact.



At Sparkloft Media we believe everything is social. Social media is changing the way the world does business. We help organizations around the world understand these changes, use them to achieve their objectives and plan for the future.

Specializing in social media since 2007 with roots in software, our work and passion are fueled by data and curiosity. Our longevity and commitment to social has given us the institutional knowledge about what works today and the ability to forecast what will work tomorrow.

We continuously refine our practices and those we teach to our clients in order to stay relevant and consistently successful in this fast-moving and ever-changing landscape.



## Project Team



### Matthew Landkamer

Principal, Coraggio Group

Role: Project Lead & Destination Strategies

- B.A. in Liberal Arts, Nebraska Wesleyan University
- Certified in PROSCI® Change Management
- Certified in Public Interest Design, SEED Network

Matthew helps clients think through, better understand and then take action on their most important strategy, organizational change, and brand challenges. His art and design background, combined with hands-on business experience, allows him to bring a unique balance of creative design thinking and strategic rigor to each of his client engagements. He is a skilled facilitator and problem solver with an impressive ability to start the conversations that need to be had inside organizations, and among organizational leaders—the kind of conversations that lead to valuable insights, bold thinking and needed results.

Matthew has spent 18 years leading marketing and strategy initiatives for organizations of all sizes from large companies to small, entrepreneurial ventures. He has worked with a wide range of Travel & Tourism organizations such as Visit San Luis Obispo County, Travel Portland, Visit West Hollywood, Ontario Convention & Visitors Bureau, and NBC Universal Studios Hollywood.

#### Select Relevant Experience:

- Visit SLO CAL  
*Strategic Planning*
- Unincorporated San Luis Obispo County TBID  
*Strategic Planning*
- City of San Luis Obispo TBID  
*Strategic Planning*
- City of Atascadero  
*Tourism Strategies*
- Visit Mendocino County  
*Strategic Planning*
- Visit West Hollywood  
*Strategic Planning & BID Charters*
- Greater Ontario Convention & Visitors Bureau  
*Strategic Planning*
- NBC Universal Studios Hollywood  
*Strategic Business Development Study and Planning*
- Santa Monica Travel & Tourism Brand Study  
*Destination Perception Study - in progress*
- City of Oregon City  
*Strategic Tourism Planning - in progress*

# Project Team



## Michelle Janke

Partner, Coraggio Group

Role: Destination Strategies

Michelle advises leaders on strategy, marketing, and organizational change. She has more than 20 years of experience working with organizations, both large and small, on helping leaders establish clear goals and maintain strong teams in achieving those goals.

Her work for clients in the areas of strategy, leadership facilitation, governance, change management and organizational assessment includes Kindercare Education, Aflac, Grand Central Bakery, Healthsparq (Cambia Health Solutions Family), Travel Oregon and Portland State University.

Michelle joined Coraggio after six years as a management consultant in Europe. Prior to this, she was an Engagement Manager with McKinsey and Company in San Francisco. Michelle also spent more than 10 years in finance and marketing management roles at The Walt Disney Company, Bertelsmann and Deutsche Bank. She is a Director of the Riverdale School Board.

- M.B.A., Haas School of Business, University of California Berkeley
- B.A. in International Relations, Mount Holyoke College

### Select Relevant Experience:

- Visit California  
*Initiative Strategy and Communications, Industry Engagement*
- San Francisco Travel  
*Strategic Planning*
- Visit Santa Barbara  
*Strategic Planning and Leadership Development*
- San Diego Tourism Authority  
*Strategic Planning*
- Greater Ontario Convention & Visitors Bureau  
*Strategic Planning*
- Los Angeles Tourism and Convention Board  
*Strategic Planning, Stakeholder Engagement*
- Travel Oregon  
*Strategic Planning, Stakeholder Engagement*
- Travel Portland  
*Strategic Planning, Stakeholder Engagement*
- U.S. Travel/National Council of State Tourism Directors  
*Leadership Development*
- NBC Universal Studios Hollywood  
*Strategic Business Development Study and Planning*

## Project Team



- B.S. in Economics and International Development, Hampshire College

### Alexandra Reese

Associate Principal, Coraggio Group

Role: Project Management, Development Economics, Destination Management Strategies

Alexandra is an experienced consultant who applies her background in microeconomics and data analysis to construct data-driven strategic plans are grounded in insights and responsive to an organization's capabilities and goals. On each engagement, she enjoys developing a strong partnership with her client to help determine the right path forward that addresses organizational goals, values and culture. She is good listener and creative problem solver, who has the ability to analyze ambiguous problems, provide clarity, and develop a structured solution that ensures her client's needs are met.

Prior to joining Coraggio, Alexandra was a Project Manager at ECONorthwest where she provided consulting services rooted in strategy and analysis for a diverse group of organizations like City of Takoma, Downtown Seattle Association, City of Salem, Oregon Business Council and James Beard Public Market. In addition to her professional work, Alexandra provides freelance consulting to the National Center for Smart Growth (NCSG) and pro-bono consulting to various nonprofits in the Pacific Northwest.

#### Select Relevant Experience:

- City of Salem  
*Strategic Planning, Local Economic Forecast*
- Cities of Leavenworth, WA and Hood River, OR  
*Feasibility Studies: Arts and Entertainment Developments, Tourism Analyses and Visitor Forecasts*
- City of Grants Pass and Josephine County, Oregon  
*Economic Development Strategic Planning*
- Beaverton School District Futures Study  
*Futures Study including Demographic and Development Forecast Scenario Work, Policy and Processes Evaluation*
- Urban Sustainability Directors Network  
*Sustainable Economic Development Toolkit*
- Oregon Department of Forestry  
*Revenue Generation and Sustainable Tourism Analysis*
- Organically Grown  
*Strategic Planning - in progress*
- Santa Monica Travel & Tourism Brand Study  
*Destination Perception Study - in progress*

## Project Team



### Colin Stoetzel

Associate Principal, Coraggio Group

Role: Data Analysis, Visitor Trends, Visitor Management Strategies

As an Associate Principal with our firm, Colin provides analytics, market research and insights that help our consultants with the development and execution of client strategy, operational improvements, and organizational assessments. On each project, Colin identifies and evaluates strategic priorities that drive meaningful, effective and sustainable solutions to organizational challenges.

- M.B.A, Northeastern University
- B.A. in Economics, The University of Massachusetts in Amherst

Colin prides himself as a big picture strategic thinker who believes the greatest insights and actions lie at the intersection of data, institutional knowledge and organizational culture. He is a champion for organizational effectiveness and believes organizations can drive change socially, environmentally and economically for the benefit of their employees and community.

Prior to joining Coraggio, Colin worked in a variety of analytical, strategic marketing, and planning roles for organizations like United Technologies, Bayer, Au Bon Pain, Daimler and the Massachusetts Division of Banks. His diverse experiences and rigorous analytic background provides Colin with the ability to look at every organizational challenge through multiple strategic lenses.

#### Select Relevant Experience:

- Unincorporated San Luis Obispo County TBID  
*Strategic Planning*
- City of San Luis Obispo TBID  
*Strategic Planning*
- Visit West Hollywood  
*Strategic Planning, Stakeholder Sentiment Analysis*
- Discover Los Angeles  
*Strategic Planning and Employee Engagement*
- Greater Ontario Convention and Visitors Board  
*Strategic Planning*
- San Diego Tourism Authority  
*Strategic Planning*
- Travel Oregon  
*Strategic and Operational Planning*
- City of Oregon City  
*Strategic Tourism Planning - in progress*
- Santa Monica Travel & Tourism Brand Study  
*Destination Perception Study - in progress*

## Project Team



### Lindsay Gettmann

Visual Communication Specialist, Coraggio Group

Role: Visual Communication

Lindsay has over three years of data visualization and graphic design experience. She brings her passion for iconography, logo design and brand strategy to every project she executes. She excels at creating beautiful visual designs for presentations, documents and reports.

Her experience designing collateral pieces for Coraggio's clients have ranged from destination marketing organizations to state agencies.

- B.A. in Communication Design, Pacific Northwest College of Arts

#### Select Relevant Experience:

- Travel Oregon  
*Strategic Planning*
- Visit West Hollywood  
*Strategic Planning*
- City of Seaside  
*Strategic Planning*
- Business Oregon  
*Strategic Planning*
- Explore Minnesota  
*Strategic Planning*
- U.S. Travel NCSTD  
*2017 Leadership Forum*
- Portland State University  
*Annual Leadership Planning Session*
- Portland Children's Museum  
*Strategic Planning*
- Pacifica Beauty  
*Organizational Assessment*
- City of Oregon City  
*Strategic Tourism Planning - in progress*
- Travel Oregon  
*Strategic Plan Implementation - in progress*
- Santa Monica Travel & Tourism Brand Study  
*Destination Perception Study - in progress*



### Robert Whelan

Senior Economist, ECONorthwest

Role: Economic Impact Analysis and Data Sourcing

- Post Graduate Courses in Economics, Columbia University
- M.S. in Mineral Economics, Pennsylvania State University
- B.S. in Earth Sciences, Adelphi University

Robert Whelan is a Project Director who has been with ECONorthwest since 1996. He specializes in market research, strategic planning, feasibility analysis, and economic forecasting. He has successfully used his skills to advise Indian tribes, local governments, nonprofit organizations, and businesses on strategies, new developments, expansions, and social/economic assessments. He has analyzed a wide range of industries including retailing, tourism, electronics, energy, construction, casino gaming, agriculture, food stores, film and video production, manufacturing, and residential housing. Before joining ECONorthwest, Robert was a Mineral Economist for the State of Oregon. He has also worked as a Director of Strategic Planning for a major northwest corporation, as a Manager of Market Research for a multinational materials company, and as a Senior Economist for a division of the Chase Manhattan Bank.

#### Select Relevant Experience:

- OTGA Gaming in Oregon 2014–2015  
*Calculated the size and economic impacts of tribal gaming in Oregon*
- Port of Centralia Development Impacts  
*Determined the tax and economic impacts of a department store and other retail developments to be built on port land in Centralia*
- Saipan Five-Star Hotel EB5—Saipan, North Mariana Islands  
*Researched and prepared an economic and job creation report in support of a new EB5 project, a five-star resort hotel on Saipan*
- Cow Creek Tribe 2016 Impact and Tax Study—Douglas County, OR  
*Conducted an economic impact analysis of the Cow Creek Tribe, its employees, and its businesses*
- Tribal Economic Impact Study—North Bend, OR.  
*For a Northwest Tribe, determined the economic and fiscal revenue impacts on a county from the Tribal government and its business operations, which included a farm, housing authority, health clinic, assisted living center, hotel, and casino.*
- Film and Video Economic Impact Studies—OR & WA (Various).  
*Produced several economic impact studies for the film industries of Washington and Oregon. For the Oregon Film & Video Office, the value of various proposed legislative initiatives were calculated.*
- Casino Industry Model—Washington, Oregon, California & Idaho  
*Built an integrated model of the casino industry using economic, demographic, traffic, and consumer survey data. The model forecasts revenues and attendance and has been used to assess the revenue potential of casino sites in a number of states*



### Martin Regge

Principal, NBBJ

Role: Urban Planner; Placemaking Strategies

Martin Regge brings a unique perspective to his many accomplishments in planning urban environments around the world. The work he has led has improved the quality and efficiency of city living on three continents by creating location-unique strategic designs that integrate nature and urban density within a framework of future-focused public infrastructure.

As an urban designer and planner, he is both interested in the physical characteristics of a place and how planning, urban design, and architecture can create a positive public environment. This is evident in the strong role he has played in getting complex projects of significant magnitude — such as the urban plan for fast-growing city of Karamay China — planned, implemented, and built.

Martin is active in the urban planning community, currently serving on the Renton Planning Commission and having recently completed two terms as urban designer on the Seattle Design Commission. In that role he champions design excellence in the public realm, advising the mayor, city council, and city departments on the design of capital improvement projects located on city land or in city rights-of-way or constructed with city funds.

- Sustainable City Planning Strategies Executive Training, Summer Session Harvard University, Graduate School of Design
- B.S. in Urban Planning and Design, Arizona State University
- American Institute of Certified Planners (AICP)

#### Select Relevant Experience:

- Tech Parks Arizona  
*Strategic Planning and Development Planning*
- The City of Bellevue, Washington  
*Spring District Master Plan*
- The City of Mount Vernon  
*Mount Vernon Visioning*
- Port of Olympia East Bay  
*Master Plan*
- Port of Seattle, North Bay  
*Master Plan*
- CORE @ Lakewood Ranch, FL  
*Master Plan*
- City of Qingdao, Dao-LingHai  
*Urban Design/Master Plan*
- Amazon.com, Denny in the Regrade  
*Rufus 2.0 Master Plan, Seattle WA*
- Starbucks Expansion  
*Master Planning, Seattle, WA*



### John Savo

Principal, NBBJ

Role: Placemaking Strategies

John is an experienced project leader and a skilled communicator. He identifies and resolves issues early, and has repeatedly demonstrated the ability to help generate positive public sentiment and regulatory approval for large, complex projects.

John's specialty is the integrated design of complex user-centered projects in sensitive urban environments. He has led some of NBBJ's most innovative projects from master planning through construction such as Amazon in the Regrade (HQ1), Vulcan's Headquarters and the Union Station Complex, Roosevelt Commons and Two Union Square. He also has a passion for adaptive reuse and sustainable design as evidenced by his rehabilitations of the Paramount Theatre and Union Station, as well as the Alley24 mixed-use development, the anchor to Seattle's first LEED Neighborhood Development pilot program.

- M.A. in Architecture, University of Washington
- B.A. in History, University of Washington
- Vice Chair, Seattle Design Commission
- American Institute of Architects (AIA)
- Society of American Military Engineers

#### Relevant Project Experience

- Port of Vancouver, Vancouver, WA  
*Waterfront Development Master Plan*
- Amazon in the Regrade, Seattle, WA  
*Master Plan, Architecture and Interiors (including Amazon Spheres)*
- Union Station, Seattle, WA  
*Master Plan and Station Rehabilitation*
- Wards Cove, Seattle, WA  
*Waterfront Master Plan & Mixed-Use Development*
- Quadrant Lake Union, Seattle, WA  
*Center Master Plan and Adobe Systems Regional Headquarters*
- Microsoft Redwest Phase II, Redmond, WA  
*Campus Master Plan, Architecture and Interiors*
- Tochterman Property, Bellevue, WA  
*Master Plan (Meydenbauer Block)*
- Washington Square, Bellevue, WA  
*Master Plan*
- South Lake Union, Seattle, WA  
*EIS and Framework Plan*



## Kim Selby

Urban Planner, NBBJ

Role: Urban Planner; Placemaking Strategies

Kim enjoys the collaborative problem solving necessitated by complex, high profile projects. She is adept at working with client leadership, user groups, stakeholders and the public to solve problems and build consensus. Kim thrives on research and the application of new ideas to each project where the team develops understanding of the key issues, defines a number of alternatives and ultimately, evaluates and selects the most appropriate solution. She works carefully to define the types and amounts of requisite space in order to identify the “right” program elements that will meet the project goals and user expectations. Most recently, Kim has worked on several state and federal projects that needed project definition and programming in order to compete for limited funding. Her writing and quantitative analysis skills have successfully helped build the case and achieve the necessary funds to continue.

- B.A. in Architecture, University of Washington
- American Institute of Certified Planners (AICP)
- Certified Urban Designer (CUD)
- American Planning Association (APA)
- APA Washington Chapter Board Member, Communications Committee Co-Chair

### Relevant Project Experience

- Port of Vancouver, Vancouver, WA  
*Waterfront Development Master Plan*
- Port of Vancouver, Vancouver, WA  
*Waterfront Conceptual Development Plan (Phase II)*
- Wilburton, Bellevue, WA  
*Commercial Area Plan*
- Port of Seattle  
*North Bay Redevelopment Plan*
- Port of Olympia, Olympia, WA  
*East Bay Master Plan*
- University of Puget, Tacoma, WA  
*Sound Space Planning & Utilization Study*
- Tacoma Community College, Tacoma, WA  
*Harned Center for Health Careers Predesign & Design*
- Ada County, Boise, ID  
*Master Facilities Plan*
- PeaceHealth, Various locations WA/OR/AK  
*20-Year Facilities Master Plan*
- Island County, Island County, WA  
*Space Needs Assessment & Master Plan*



### Arianna Howe

Vice President - Client Services, Sparkloft

Role: Visitor Sentiment

A planner at heart, Arianna ensures creative and account services connect audience goals to clients' business objectives through strategy and engaging storytelling. Arianna has led some of Sparkloft's most acclaimed campaigns for Brand USA, CAA (Creative Artists Agency), KLM and Disney. She specializes in work rooted in audience development, where she mines social data and insights to uncover patterns, opportunities and threats for her clients.

- B.S. in Marketing,  
University of Arizona

Working in marketing for over 10 years, she started as an in-house B2B digital market researcher before joining Sparkloft in its early days.

Select Relevant Experience:

- Brand USA  
*Audience Development*
- Strategic planning  
*Global Traveler Sentiment Reporting*
- German National Tourist Office  
*Product Development Opportunity Evaluation and Audience Insights and Opportunities*
- Travel Oregon  
*Media Planning*
- Visit Santa Barbara  
*Audience Development and Strategic Planning*
- Greater Ontario Convention & Visitors Bureau  
*Visitor Sentiment Analysis for a Strategic Plan Refresh*
- Santa Monica Travel & Tourism Brand Perception Study  
*Visitor Sentiment Analysis and Digital Intercept Studies for Destination Perception Study - in progress*



VISIT SLO CAL  
Relevant Projects





Client  
Travel Oregon

The Oregon Tourism Commission knows the value of its work: Every \$1 invested in Travel Oregon campaigns generates \$237 in visitor spending and \$11 in tax revenue. But creating a new vision for the growing organization would be no small feat.

Services Coraggio  
Provided:  
Strategic Planning,  
Stakeholder  
Engagement,  
Operational  
Planning,  
Employee  
Engagement,  
Regional Grant  
Work

Travel Oregon approached Coraggio for help in evaluating the industry's challenges and opportunities. The group needed to meet the needs of diverse stakeholders, from hotel owners in the Painted Hills to ODOT officials paving I-5. Equally important was the need to make Travel Oregon not just an effective organization, but one to admire as a place of employment.

#### **The view from Mt. Hood**

Coraggio and Travel Oregon worked collaboratively to create an inclusive strategic planning process. Our team spent the next year capturing the voices of stakeholders and experts representing every possible angle:

- Local and regional interests
- All things Oregon
- Expert input from neighboring state travel boards and national leaders
- International travel prospects and industry forecasts

We launched engagement surveys, facilitated visioning sessions, led interactive panel sessions and hosted regional town halls in 22 locations across the state. The data we collected and the stories we heard gave us a richer, clearer view of Oregonians' needs.

#### **Exploring the Gorge**

Without the energy of the managers leading the campaigns and the support of the assistants arranging local events, any plan would fall flat. We opened up the planning process to Travel Oregon staff members and gathered their ideas, opinions and experiences, all the while keeping them informed of the big picture. We effectively challenged each and every member of Travel Oregon's staff to step outside of their day-to-day work and think strategically across the organization's mission.

#### **Coasting forward**

The engagement process culminated in a summit that brought stakeholders and employees together to envision the future of Oregon travel and tourism. Peer work groups discussed key themes and insights, and participants seized the opportunity to build new relationships and contribute. Insights from this summit informed the creation of the strategic initiatives and action steps for the strategic plan. Together, we created a unified vision for the future.

#### **She flies with her own wings**

The resulting plan, "Activating Explorers," contained 20 pages of innovative and impactful strategies -- all inspired by people from across the industry. With an engaged team and an informed roadmap, Travel Oregon was ready to fly with its own wings.



Client  
Visit SLO CAL

Services Coraggio  
Provided:  
Strategic Planning,  
Stakeholder  
Engagement,  
Operational Planning

Visit SLO CAL inspires travel and fosters economic growth in San Luis Obispo County, a region known for its diverse Central Coast landscape of Pacific Ocean, oak-dotted hills and expansive vineyards. When the organization transitioned from a modest, county-funded marketing team to an industry-backed Tourism Business Improvement District (TBID), funding dramatically increased—as did stakeholder interest.

### **The Lay of the Land**

Under the new model, local hotels began contributing funds directly to the TBID, and they wanted a speedy return on their investment in the form of a more productive organization and a vigorous tourism industry. In the face of these expectations, Visit SLO CAL needed to prove to stakeholders that it was shifting momentum and nurturing new opportunities across the region. Like many teams establishing themselves, Visit SLO CAL's was intent on developing its identity and clarifying its direction. The organization partnered with Coraggio to get a fresh look at the area's tourism environment and produce a strategic plan to guide and stimulate growth. Doing so also meant transforming the group from a small-scale marketing agency to a flourishing community advocate.

### **Out in the Field**

To form a long-term, collaborative plan with community support, we had to understand stakeholders' expectations: What did they need? How did they envision the future of San Luis Obispo County tourism? We interviewed hotel owners, community leaders and other residents to gather a holistic view of the region's interests. Their feedback gave clarity and guidance on our next steps. Visit SLO CAL's survival depends on the support of its constituents, so transparency was vital. With each two-day strategic planning workshop, we concluded the working sessions with Board input and stakeholder feedback. The insights from these meetings were incorporated into the strategic plan to create a stronger, more relevant final product.

### **The Fruits of our Labor**

This commitment to communication and transparency paid off. By including board members and stakeholders in the development process, we were able to address any potential issues before finalizing the strategic plan. The enthusiastic team at Visit SLO CAL facilitated a smooth planning process, and our success gave invested stakeholders confidence that the group was serving their interests and capable of developing new economic opportunities for the county. They respected the breadth of the research and plan, which spanned everything from a review of higher-level community values to specific advice to increase daily flights into the regional airport.

### **Reaping the Benefits**

The benefits of this process branched out beyond tourism marketing agencies. With the insights and experience he gained working with Coraggio, Visit SLO CAL's President and CEO advised groups like the local Chamber of Commerce and SLO Wine Country Association to be more strategic with resources. Visit SLO CAL—and the entire region—were empowered to lead on their own.

# Los Angeles Tourism & Convention Board

Strategic Planning | Los Angeles, CA



Client  
Los Angeles Tourism  
and Convention  
Board

Services Coraggio  
Provided:  
Strategic Planning,  
Organizational  
Assessment,  
Stakeholder  
Engagement,  
Employee  
Engagement

Tourism is vital to the Los Angeles economy. In 2011, LA County welcomed over 40 million visitors who spent more than \$15 billion. Recently the Los Angeles Tourism & Convention Board secured a new funding source through the formation of the Tourism Marketing District. This new funding increased LA Tourism's annual marketing budget by nearly 50%.

In preparation for this expanded budget, Coraggio was hired to lead its three-year strategic planning process to help LA Tourism executives and Board of Directors determine the best use for the new funds. The Board faced the daunting task of constructing a strategic plan that benefitted the many various neighborhoods it assists – from the surf and sand of beach communities to the shops and movie studios of the San Fernando Valley.

As a precursor to the planning work, Coraggio conducted a comprehensive organizational assessment that included key external stakeholders (elected officials, business & civic leaders) throughout Los Angeles. We extracted critical insight that has been integral in setting LA Tourism on a new strategic path. In addition, we made specific recommendations for restructuring aspects of the organization, based on our assessment, in order to ensure LA Tourism was organized to consistently deliver on its business objectives.

Our work centered around building a plan that would aid the Board in guiding the development of physical aspects of the destination (for example, evaluating the benefits of expanding the convention center and exploring the construction of a professional football stadium) that would best serve the overall tourism strategy.



# San Francisco Travel

Organizational & Operational Assessment | San Francisco, CA



Client  
San Francisco Travel

Services Coraggio  
Provided:  
Organizational  
Assessment,  
Operational  
Assessment,  
Stakeholder  
Engagement

Tourism is San Francisco's largest industry, generating more than \$8 billion in annual direct spending, which directly benefits San Francisco residents and businesses.

In late 2009, San Francisco's hotel owners and operators approved a new funding mechanism called a Tourism Improvement District. With this new, more stable funding stream, San Francisco Travel saw the need to examine all facets of its operation and to develop a long-term strategic plan that would help to maximize its effectiveness and ensure its reputation as one of the most admired destination marketing organizations in the world.

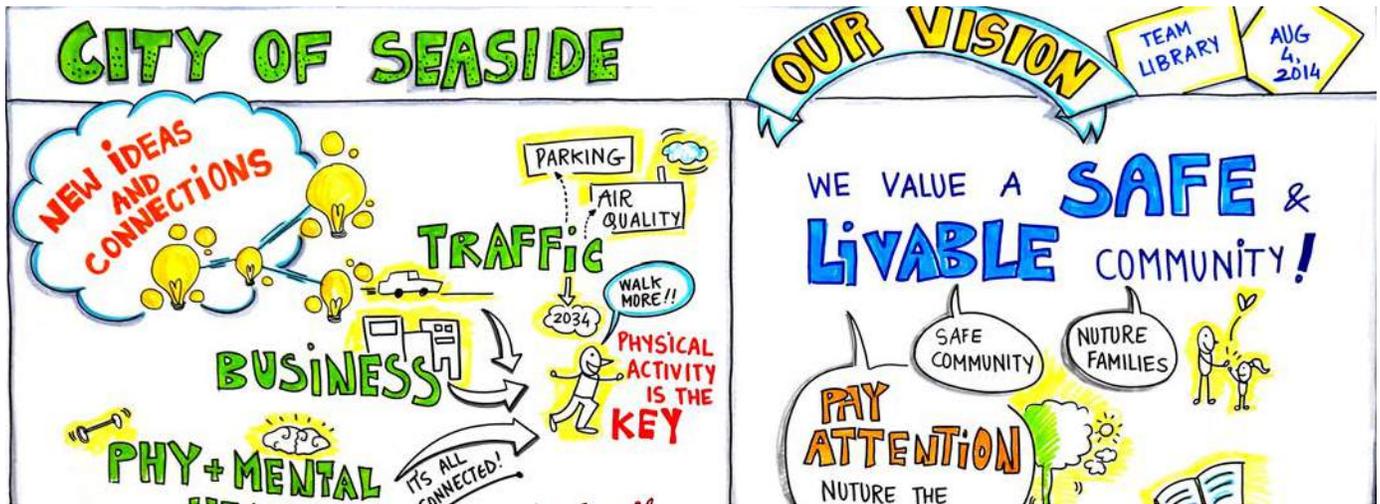
The economy had impacted all domestic and international travel segments, including leisure, meetings/convention and group tour. It was clear that San Francisco Travel had to find ways to adjust not to a short-term blip, but to a long-term, significant realignment of the economy. Essentially a "new normal" had been created in the travel industry and San Francisco Travel wasn't about to be left behind.

Coraggio partnered with San Francisco Travel to lead the most substantial organizational and operational assessment and subsequent overhaul in its 100-year history.

To establish a clear "current state" perspective, we began our work by conducting a broad situational review of stakeholders, customers, competitors and employees to understand the new reality that San Francisco Travel faced. With this work as context, we then led the organization through the development of a four-year strategic plan and a first-year organization-wide operational plan, a complete redesign of its membership benefits and pricing structure, and the development of a new process for the distribution of information.

Coraggio also redesigned San Francisco Travel's organizational structure as a way to streamline workflow, maximize operational efficiency and ensure the successful implementation of its new strategic plan.





Client  
City of Seaside

Services Coraggio  
Provided:  
Strategic Planning,  
Community Visioning

In 2014, the City of Seaside undertook a comprehensive visioning project that looked out 20 years into the future and asked the question: What kind of City do we want to be in 2034? It’s a great question—but City Council members knew there were many paths that could be taken. The City chose Coraggio to lead a process that would culminate in a long-term vision statement that would engage and inspire residents. We also worked with the City Council to create a strategic plan that would be informed by the vision statement and serve as a blue print for decision making and goal setting for all City agencies as they began the 20-year journey toward 2034 and beyond.

Coraggio knew that in order to ensure that the new vision would be a source of inspiration and one that would further rally and unify the community, it couldn’t be created within the walls of City Hall. After gaining a thorough understanding of what City Council Members needed to achieve through this process, Coraggio worked to design an engaging, highly interactive insight gathering experience that included a diverse range of Seaside stakeholders, including residents, elected officials, City and County employees, school children and business & civic leaders. Fun exercises were designed to unlock creative and visionary thinking as well as a series of dialogue sessions that explored some of the most pressing challenges the City was either currently facing or would be facing in the years to come—issues such as crime, resiliency planning, infrastructure, funding for education and preservation of natural landscapes and habitats that define the ethos of the area. In addition, a graphic illustrator tracked the entire experience live by drawing various highlights of the facilitated discussions.

The finished drawing, as pictured above, now hangs in City Hall and serves as a reminder to all who enter that the future belongs to the community—and hundreds of people had a say in designing Seaside’s path forward.

# City of Grants Pass and Josephine County

Economic Development Strategic Plan | Grants Pass, Oregon



Client  
City of Grants Pass  
and Josephine  
County

Services Provided  
Strategic Planning,  
Community  
Engagement, Policy  
Analysis

Previous to her work at Coraggio, Alexandra Reese, along with Bob Whelan, produced a joint Economic Development Strategy for the City of Grants Pass and Josephine County. The strategy set forth a vision for economic development, strategies and actions to move the City and County toward that vision, and a brief implementation plan for each action. This Strategy is unique in that it must address the diverse – and sometimes competing – needs of both urban and rural economic development. It was based on a triangulation of data analysis and stakeholder and community engagement.

ECONorthwest worked with the City and County to develop an accompanying Transition Plan. Neither the City nor the County had an economic development organization to manage plan implementation. So, developing a plan to form and kickoff a joint economic development organization was critical to the successful implementation of the Strategic Plan.







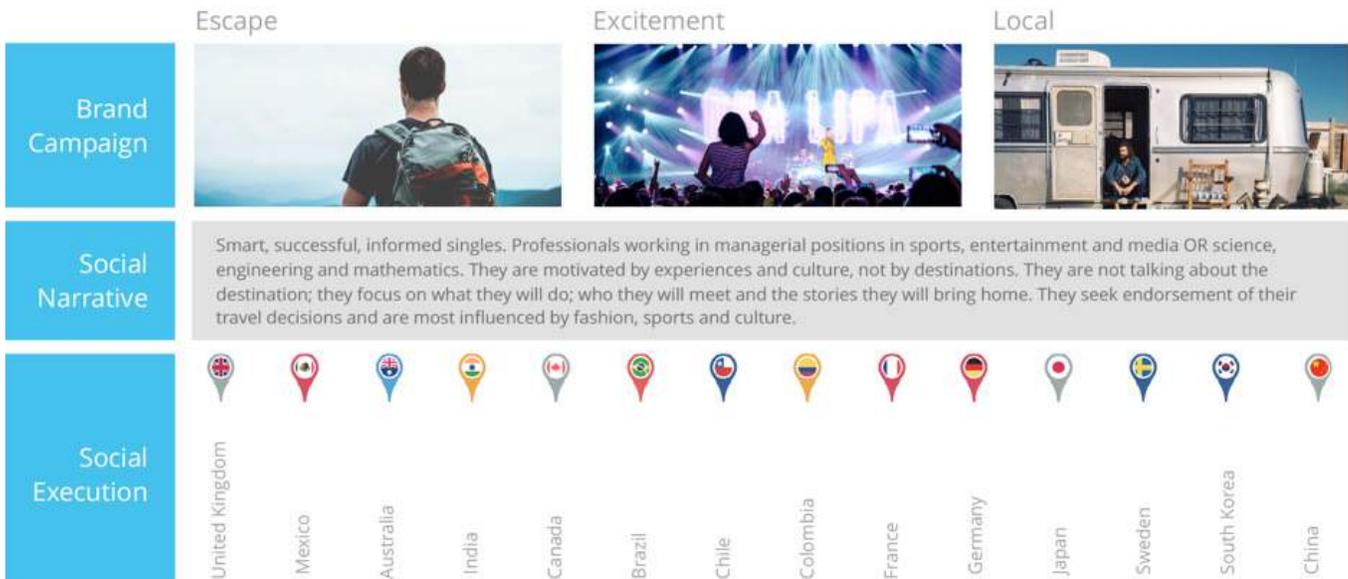
Client  
 Mount Vernon &  
 Civic Partners

Services NBBJ  
 Provided  
 Stakeholder  
 Outreach, Planning  
 and Urban Design

NBBJ and Civic Partners worked with the City of Mount Vernon to realize the Downtown and Waterfront Master Plan previously developed through a community-wide process. NBBJ, in association with Civic Partners, provided strategic thought leadership, urban design and development strategies. The team worked closely with the City's Community and Economic Development Department and various community and business stakeholders.

Mount Vernon was recently ranked "Best Small City in America" by the New Rating Guide to Life in America's Small Cities. The NBBJ/Civic Partners team worked to leverage the recent Master Plan and Mount Vernon's reputation as a great small city to identify development strategies for the City's future Downtown—both in the near-term and decades into the future.





Client  
Brand USA

Services Sparkloft  
Provided  
Editorial Planning,  
Visitor Insights  
and Social Media  
Behaviors

From 2000 to 2010, international travel to the United States decreased significantly, with share of long-haul travel alone falling 4.8 percent. Facing an ever-competitive market, Brand USA sought to reinvigorate the nation’s image and recapture its share of international visitation. Sparkloft designed an editorial plan utilizing audience insights and social media behaviors in 13 international markets including:

- Thematic travel motivations
- Trip planning stages throughout the calendar year (eg., dreaming versus planning versus traveling)
- Level of familiarity with the United States

This ensured that all of Brand USA’s content would connect with a traveler at a different phase of their trip planning, from inspiration and planning to booking and traveling to touting their experience during and after their trip abroad.

Through this research and development, it was uncovered the motivated traveler was more interested in the experience than the destination, which provided the lens through which partner programs were designed, content was created and media was placed.

**Key Metrics** - For FY 2016, our work with Brand USA received 1.9 billion impressions, 71.9 million engagements, 1 million new social fans/followers, 259,000 hashtag mentions and answered over 38,000 direct consumer inquiries.

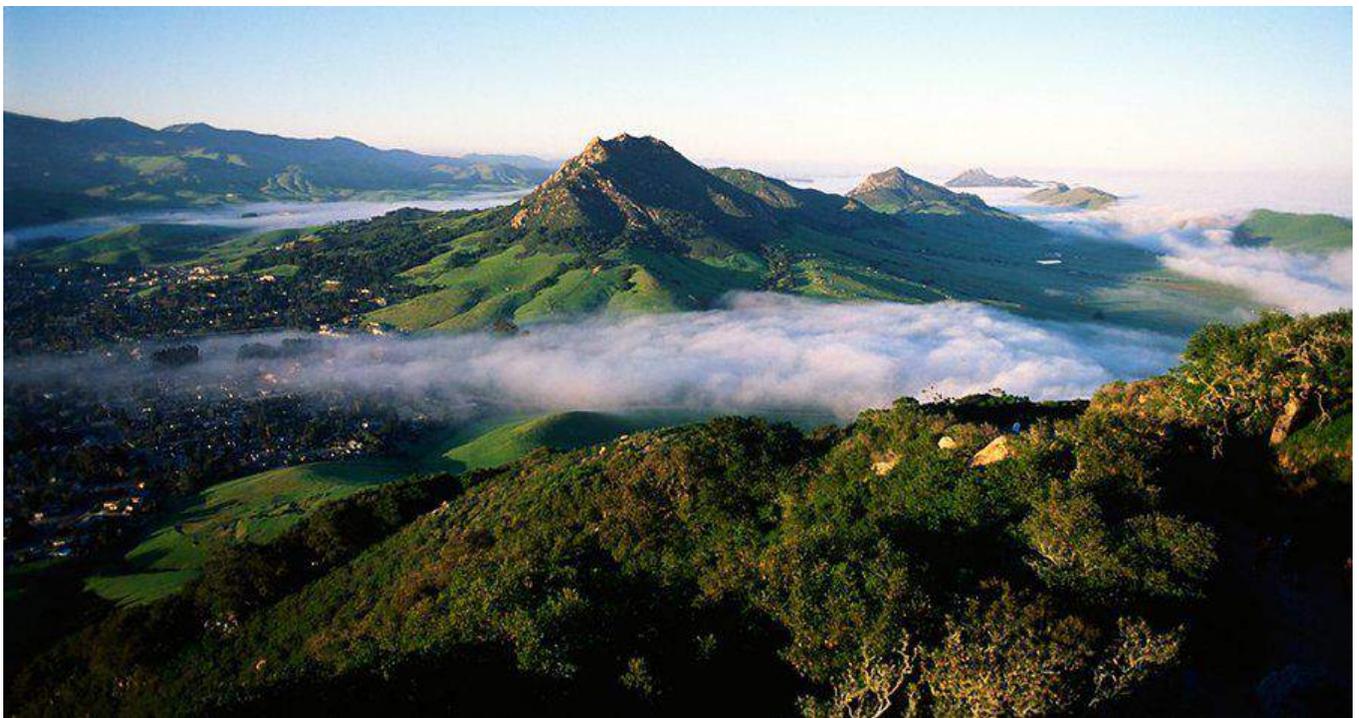
**Audience Development** - Sparkloft used audience motivations and travel triggers to drive visitation while also considering and planning for market-specific nuances, behaviors and familiarity with the United States.

# SAN LUIS OBISPO COUNTY DESTINATION DEVELOPMENT PLAN PROPOSAL

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## RESONANCE

December 5, 2017





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# RESONANCE

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December 5, 2017

Chuck Davison  
President & CEO  
Visit SLO CAL

Dear Chuck,

Please find enclosed Resonance Consultancy's proposal in response to your request of us to produce a Destination Development Plan for San Luis Obispo County, California.

As a leading and experienced place strategy, place branding, place marketing and placemaking consultancy, which has successfully produced major destination strategies for Vancouver B.C.; Cincinnati USA; Tulsa, Oklahoma; Bellevue, Washington; Portland, Oregon, and many others, I believe you will find that Resonance is well suited to assist Visit SLO CAL in this effort.

In addition, for this project, Resonance will be teaming with Tourism Economics, the world's premier tourism analytics and forecasting firm to analyze and forecast the economic impact that tourism has on San Luis Obispo County. This partnership will provide a firm analytical foundation for a forward-looking vision, strategies, recommendations and plans associated with developing the County as a premier destination for visitors, as well as for residents who want to enjoy a high quality of life.

Like our recent projects, we have designed this project to include extensive stakeholder and community engagement and working with a board-level Steering Committee to develop and agree on a strategic vision for tourism's future in the County. Also, like our previous projects, we expect this effort to deliver important long-term change in how San Luis Obispo County develops, manages and markets its tourism destination, products and services, as well as recommends improvements to the quality of life for the community and local residents.



The place strategy team at Resonance would enjoy assisting Visit SLO CAL in this important project. If you have any questions, please do not hesitate to contact me at your convenience. We look forward to discussing our proposal with you in the near future.

Best regards,

A handwritten signature in black ink, appearing to read 'CF', with a large, sweeping flourish at the end.

Chris Fair  
President  
Resonance Consultancy

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# INTRODUCTION

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Historically, the wealth of communities and nations has been determined primarily by geographic factors—climate, access to resources, ports and proximity to other centers and points of trade. For centuries, the luck of the geographic draw attracted capital and investment, created jobs and generated economic growth and prosperity. But as developed economies have shifted rapidly from a manufacturing orientation to services and technology in the latter half of the 20th century, geographic factors have become less important in determining the economic success of cities, regions, states and countries. Today, it is increasingly the perceived quality of place that determines where talent, capital and travel and tourism flow.

But what is it that attracts people to one place versus another? Research by Resonance Consultancy has shown that what attracts people to places to live is increasingly aligned with the very same factors that make places attractive to visit. Among them: the quality of the natural environment, parks and open spaces; the diversity of people; the variety of restaurants and nightlife; and the quality of arts and culture. These assets, and many others, shape the perception and identity of places in the minds of people as they consider and evaluate places to live, visit or invest.

Therefore, destination marketing and management requires taking a strategic, rather than organic, approach to defining an overarching vision and competitive positioning for a destination in order to attract specific types of travel and tourism to the destination. In a world where the competition for visitors is fierce, knowing and understanding the ideal visitor segments, speaking directly to them and focusing on providing a high-value travel experience can help destinations differentiate themselves.

Resonance Consultancy has developed a unique approach and methodology to benchmarking destinations on a qualitative basis, which will help San Luis Obispo County understand its key competitive advantages—and weaknesses. These provide the foundations to create a Destination Development Plan to guide the planning, product development, programming, policy and promotion of San Luis Obispo County's tourism industry.

The proposal that follows outlines a recommended approach and methodology for San Luis Obispo County and key stakeholders to define, create and implement a Destination Development Plan that balances the County's economic vision, tourism assets, stakeholder interests and visitor demand.

# COMPANY OVERVIEW

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## SHAPING THE FUTURE OF DESTINATIONS AROUND THE WORLD

Resonance Consultancy creates tourism master plans, destination development strategies, marketing strategies, and management plans that shape the future of destinations and developments around the world.

Our team has advised destinations, communities, cities and governments throughout North America and more than 70 countries around the world. We provide leading public and private sector organizations with visioning, structuring, trend forecasting, marketing strategy, stakeholder engagement, competitive analysis, economic development strategy, and place branding to help places realize their full potential.

From Bucharest to Brasilia, Hawaii to Haiti, we have helped clients understand consumer trends, influence policy, engage their communities, plan for the future, and market their unique destinations. Our future-focused visioning workshops, reports and development strategies help our clients find their way forward, provide plans for action, and give officials, investors and the public ways to engage and reasons to believe.

The principals of Resonance have more than a half-century of combined tourism development, branding and marketing experience, and have completed more than 100 tourism strategy, planning, and branding projects. Our interdisciplinary team of strategists, planners, and marketers has led major tourism initiatives in Canada, the United States, the Caribbean, Philippines, New Zealand, Australia and Ireland over the past decade. Recent Resonance clients that have benefited from our experience, approach and process include Travel Portland; Tourism Vancouver; Visit Tulsa; Cincinnati USA; Bellevue, Washington; Snohomish County, Washington; Aruba Tourism Authority, and the Republic of Ireland's National Tourism Development Authority.

Our approach to creating Destination Development Plans for cities, regions and countries is rooted in thoroughly understanding consumer lifestyle trends, defining the aspirations of both current and prospective future consumers, benchmarking a destination against its competitive set and creating a market-leading strategic plan for it.

Resonance Consultancy and its principals are members of Destination Marketing Association International, The Association of Professional Futurists, Urban Land Institute, and the Travel & Tourism Research Association.

### **Resonance Consultancy Ltd.**

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# TOURISM ECONOMICS

## ***Resonance Consultancy and Tourism Economics: 25 Years of Collaboration***

Resonance Consultancy Executive Vice President, Richard Cutting-Miller and Tourism Economics President Adam Sacks have worked on joint projects since the early 1990s when Richard was EVP of the World Travel & Tourism Council and Adam was an economist for The WEFA Group.

Together, Richard and Adam have traveled the world producing tourism economic research and tourism satellite accounts for 175 countries including customized models for Argentina, Cochin India, The Algarve (Portugal), Hawai'i, Hungary, Indonesia, The Philippines, Singapore, South Carolina, Thailand and many more.

This work by Richard and Adam have set the global standard for combining tourism economics and forecasting with tourism policy, strategy and planning for a complete and seamless delivery of information and insight to our clients.

Tourism Economics will be acting as subcontractor to Resonance Consultancy for the economic modeling and forecasting work required in this project.

## **Tourism Economics**

Tourism Economics LLC is an Oxford Economics company with a singular objective: combine an understanding of tourism dynamics with rigorous economics in order to answer the most important questions facing destinations, developers, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, tourism forecasting models, tourism policy analysis, and economic impact studies.

With more than six decades of experience among our principal consultants, it is our passion to work as partners with our clients to achieve a destination's full potential. Our team of 15 economists is focused exclusively on the interplay between the travel industry and the economy. The firm was formed 10 years ago in partnership with Oxford Economics.

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and more than 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington, D.C. We employ more than 250 full-time staff, including 150 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists. Our global team is highly skilled in a full range of research techniques and thought leadership capabilities, from econometric modelling, scenario framing, and economic impact analysis, to market surveys, case studies, expert panels, and online analytics. Underpinning our in-house expertise is a contributor network of more than 500 economists, analysts and journalists around the world, as well as our heritage with Oxford University and the academic community.

Oxford Economics is a key adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base now comprises more than 1,000 international organizations, including leading multinational companies and financial institutions, key government bodies and trade associations, and top universities, consultancies, and think tanks.

Tourism Economics has a full-time team of 15 and has been in business for 10 years. Key factors underpinning Tourism Economics work include:

### **Travel industry expertise**

Tourism Economics has vast experience in providing actionable and credible analysis of travel activity. Our combined team has substantial direct hands-on experience in destination visitor economic impact.

### **Economic and tourism databases**

Our global tourism databases of origin-destination visitor flows and spending has the best country, city, and indicator coverage of any private sector provider through our partnerships with the UNWTO, PATA, and the CTO along with our internal updates of the most recent trends. The Oxford Economics global model covers 190 countries and 3,000 cities and is updated constantly by our data team in Oxford.

### **Senior staffing**

Tourism Economics operates as a boutique tourism consulting company in one important sense: we assign senior staff at the center of each and every project. Our project directors are integrally involved in every stage of work and are directly involved in its development. The principals who represent our work are the same who conduct the work. We have found this to be an optimal way to sustain high quality and maintain close relationships with our clients. It is also the way we enjoy working.

Tourism Economics, Inc.  
303 West Lancaster Avenue, Suite 2E, Wayne, Pennsylvania, 19087, USA  
Office: +1.610.995.9600

Additional information about Tourism Economics can be found at [TourismEconomics.com](http://TourismEconomics.com)

# KEY TEAM MEMBERS



**Chris Fair**  
*President*

cfair@resonanceco.com  
Vancouver, British Columbia

A futurist, strategist and facilitator, Chris holds a Masters degree in Studies of the Future and has married his marketing expertise with futures methodologies to help a wide variety of clients envision and create development strategies, plans, policies and brands that shape the future of places around the world. As president of Resonance Consultancy, Chris leads a team that has completed more than 100 visioning, strategy, planning, policy and branding projects for destinations and cities such as Vancouver, Calgary, Cincinnati, Aruba, Hawai'i, Haiti, Fayetteville, Tulsa and Ireland.

A member of the Urban Land Institute Executive Council, a member of the Project for Public Spaces leadership council, and a contributing industry expert to the Destination Marketing Association International's Destination NEXT project, Chris frequently speaks on tourism and social trends to organizations such as DMAI, ULI, CEOs for Cities, International Downtowns Association, Association of Travel Marketing Executives, World Leisure Congress, and the World Future Society. He has been featured in Fast Company magazine and is a frequent commentator on lifestyle and leisure trends for leading publications such as The Wall Street Journal, Bloomberg, The Globe & Mail, Los Angeles Times, The Economist and Worth magazine.

In 2013, Chris was recognized as the "Place Branding Thought Leader of the Year" at the World Sense of Place Summit. He recently designed Resonance Consultancy's new Place Equity Index®, which analyzes and ranks 130 U.S. cities based on a unique benchmarking model that blends core statistics with millions of consumer ratings and reviews in 30 different categories. The result is a measure of the relative attractiveness (for talent, investment and tourism) and "place equity" of one U.S. city to the next.

Chris is a bilingual Canadian who was granted permanent residence in the U.S. as an "individual of extraordinary ability." After living in the U.S. for the past 12 years, Chris and his family recently relocated to Vancouver, B.C.

#### Qualifications

Master of Science (Studies of the Future), University of Houston, Houston, Texas USA, 2006  
Bachelor of Arts (Journalism), Concordia University, Montreal, Quebec, Canada, 1994

#### Membership in Professional Associations

- Destination Marketing Association International
- Urban Land Institute (ULI)
- The World Leisure Organization
- The Luxury Marketing Council - Project for Public Spaces
- The Luxury Board - CEOs for Cities
- Association of Professional Futurists

#### Current and Previous Positions

- President, Resonance Consultancy Ltd., Vancouver, BC: 2007 – present
- President, IMI Resort Marketing LLC, Greenville South Carolina, USA: 1999 – 2007
- President, Ryan & Deslauriers Communications Ltd. Montréal, Québec: 1996-1999
- President, Traveller Infomedia Corp. Mont-Tremblant, Québec: 1993-1996



**Richard Cutting-Miller**  
*Executive Vice President*  
 rrcm@resonanceco.com  
 New York, New York

Richard R. Cutting-Miller has produced more than 50 Strategic Plans for tourism-focused economies (national, state and regional) ranging from China, Hong Kong and Macau to South Carolina, the Former Soviet Union, the Caribbean and Montenegro.

A 25-year travel industry veteran, Richard was Executive Vice President for the World Travel & Tourism Council (WTTC) and played a principal role in shaping and directing the organization, policy agenda, research program, communications and membership services for the organization.

During his 16-year tenure with WTTC, Richard travelled worldwide, consulting and speaking on the topic of Travel & Tourism economics, policy and advocacy, and produced more than 100 strategy and policy projects for regions such as the Caribbean, the Mercosur and APEC, and countries as diverse as China, Montenegro, Qatar, Indonesia, Australia, Thailand, Namibia and South Africa. In total, Richard has worked in 65 countries and more than 350 cities.

Prior to joining WTTC, Richard served as a management consultant for Deloitte & Touche in New York. As a member of the firm's Travel & Leisure industry practice, he managed a number of Travel & Tourism consulting projects, including the Strategic Plan for Tourism for the State of Hawai'i.

#### Qualifications

Master of Business Administration (Finance), Southern Methodist University, Dallas, Texas, USA, 1986

Bachelor of Science (Mathematics) University of Oklahoma, Norman, Oklahoma, USA, 1983

#### Membership in Professional Associations:

Travel & Tourism Research Association, U.S. Travel Association, Pacific Asia Travel Association, UN World Tourism Organization

#### Current and Previous Positions

Executive Vice President, Resonance Consultancy Ltd. 2012-Present

Founder and Principal, Tourism Policy Group, 2012

President & CEO, Tourism ROI LLC, 2007-2012

Executive Vice President, Vice President Research and Economics, Director Policy Development and Research, World Travel & Tourism Council, 1991-2007

Manager, Management Consulting, Deloitte & Touche, 1986-1991

**Adam Sacks***President*

Tourism Economics

adam@tourismeconomics.com  
Philadelphia, Pennsylvania

Adam Sacks is the President of Tourism Economics; an Oxford Economics company dedicated to analytically-based consulting to the tourism sector. Adam led the travel & tourism consulting division of IHS Global Insight for ten years before starting Tourism Economics in 2005.

Over the past twenty years, Adam has worked with hundreds of travel sector clients to address fundamental economic questions.

On the public sector side, Adam has worked with national, provincial/state and local tourism offices throughout the world. He is an authority on measuring the economic impact of tourism activity—both broadly and for specific initiatives and projects. He has advised destinations on tourism investment policy, the effects of proposed entry procedures, tourism taxation, and marketing strategies. He has provided numerous destinations with analysis on market positioning and emerging opportunities.

Adam has consulted with multi-national hotel chains, airlines, aircraft manufacturers, theme parks, resort developers, and retail operators to measure current and future market opportunities. He has presented to numerous corporate strategic planning teams on the threats and opportunities facing their businesses within the projected travel and economic climate.

He is an expert in developing custom systems for quantifying relevant tourism market segments and tracking the competitive landscape for clients. Adam has developed tourism forecasting models with unrivalled track records.

Adam has implemented the UN-sanctioned TSA methodology for measuring the economic impact of tourism for over a dozen countries and for seven states in the US.

Adam is a compelling and sought-after speaker on issues related to tourism market analysis, the economic impact of tourism and travel-demand forecasting. He also has presented tourism impact results to governments around the world. Adam is a member of the US Department of Commerce Travel & Tourism Advisory Board. Adam will oversee methodology, review all results, and ensure client satisfaction.



### Sara Fahy

Vice President Strategy  
[sfahy@resonanceco.com](mailto:sfahy@resonanceco.com)  
 Los Angeles, California

As Vice President, Strategy at Resonance Consultancy, Sara facilitates strategy for public and private entities from economic development agencies and destination marketing organizations to urban and resort developers around the world. She helps stakeholders translate research, vision, insight and regional needs into actionable strategies that produce results. An international business strategist and an activator, Sara holds a Masters in International Business and spent the past 15 years developing strategy across corporations, governments and nonprofits in the U.S., Europe and Asia Pacific. From public-private partnerships and technology startups to Fortune 100 pharmaceuticals, Sara has managed brand strategy, corporate reputation, stakeholder engagement, government relations, international affairs and corporate social responsibility impacting healthcare, policy, sustainable development, education and entertainment.

Sara worked for nearly a decade in New Zealand, with projects in Belgium, France and Australia. Sara speaks on social change strategy, international business and marketing for organizations such as the PR Society of America, University of Auckland MBA, and the NZ Government Conference on Voluntary Carbon Markets. She has been featured in FORTUNE and is a regular contributor to projects featured in leading publications such as The Wall Street Journal, The Sunday Times (London), and Forbes.

#### Qualifications

Masters of International Business, University of Auckland, New Zealand  
 Bachelor of Arts, Communications (Advertising), Minor, Industrial  
 Organizational Psychology, California State University, Fullerton

#### Professional Associations

New Zealand – Europe Business Council, Founding Member  
 American Marketing Association  
 Public Relations Society of America, Board Member & Awards Judge  
 Urban Land Institute (ULI)  
 World Health Organization – IABC, VISION 2020 NZ  
 Be Institute, Board Advisor – public-private partnership on built environment  
 Remnant International, Board Advisor, Social enterprise, Uganda and U.S.

#### Current and Previous Positions

VP, Strategy, Resonance Consultancy, NYC/LA/Vancouver, 2016 – present  
 Director of Strategy, Social Change Co, Auckland/Los Angeles, 2010 – present  
 Managing Director, RUHM Luxury Marketing, Irvine, California, 2015 – 2016  
 Executive Director Stakeholder Relations, Blind Foundation, NZ, 2008 – 2012  
 Consumer Affairs Marketing, Pfizer Healthcare, New Zealand, 2005 – 2007  
 NCRE Public Affairs, European Parliament, Belgium/France, 2005 – 2006  
 Director of Marketing/Real Estate, Miller Law Firm, Newport Beach/San  
 Francisco/Las Vegas, 1999 – 2004



**Tim Hasid**

*Planning Analyst*  
[thasid@resonanceco.com](mailto:thasid@resonanceco.com)  
 Montreal, Quebec

Tim brings an analyst’s rigor, a mapmaker’s precision and a placemaker’s passion to his work on Resonance’s proprietary research, contributing to recommendations on strategic planning, urban design, placemaking and livability. A Master of Science in Urban Planning and Sustainable Development from the University of Bordeaux, Tim also has a BSc in Civil & Environmental Engineering from the University of Cardiff Engineering School.

He has worked with clients ranging from the City of Tulsa to the Republic of Ireland, all the while providing deep data insights that surface the vital signals from the noise and provide organizations with target market behaviours that take the guess work out of planning.

His recent internal Resonance projects include data journalism initiatives such as the Future of B.C. Housing Report, as well as the global index of place equity known as World’s Best City Brands, two internationally recognized works whose insights were used and reported on by global media.

Tim is a poly-cultural lover of urban lifestyles whose data analysis and mapping make places from Cincinnati to Vancouver more attractive for living, tourism and investment – and contributes to recommendations on strategic planning, placemaking and livability.

**Qualifications**

Master of Science in Urban Planning and Sustainable Development, University of Bordeaux, France  
 Bachelor of Science in Civil & Environmental Engineering, University of Cardiff Engineering School, UK

**Current and Previous Positions**

Planning Analyst, Resonance Consultancy, Vancouver/New York, 2016 – present  
 Regional Planner, Valorem Energies, Bordeaux, France, 2013

# RESONANCE RESEARCH

As a company that specializes in travel and tourism strategy, Resonance offers a unique set of skills and experience that bring together both destination visioning and strategic planning. These skills have been put to use on a wide variety of assignments ranging from creating a Tourism Master Plan for Vancouver, to developing a Strategic Business Plan for the Aruba Tourism Authority.

In all of these assignments, we bring to bare our extensive and proprietary research and the insights we've obtained from it. While other firms focus their research primarily on how travel and tourism is purchased and consumed, our work is primarily focused on understanding the motivations and values of travelers, the experiences they participate in, the ones they aspire to try, and types of hotels and amenities they desire. This way, we can provide recommendations to DMOs that will not only resonate with their target audiences today, but well into the future.

Our research has focused on key segments we believe are most likely to influence the future of travel and tourism, such as Millennials, Affluent, Retirees and Chinese travelers. At the same time, we have also developed a unique approach to analyzing and benchmarking the supply-side of tourism to create reports such as the U.S., Canada, and Caribbean Tourism Quality Indexes.

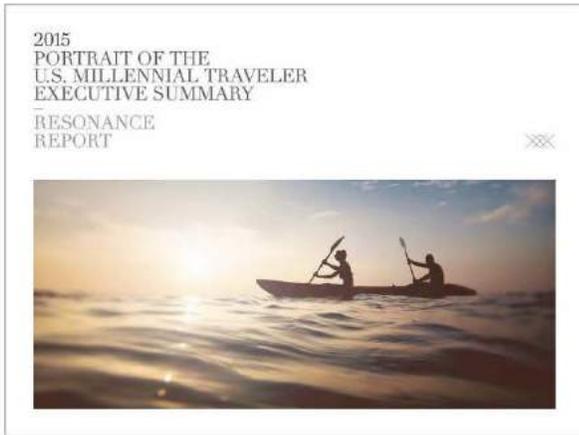
Recent and forthcoming Resonance Reports include detailed analysis and reports on subjects such as:

- The Future of U.S. Millennial Travel
- The Future of Chinese International Travel
- The Future of Luxury Travel
- Canada Tourism Quality Index
- U.S. Tourism Quality Index
- Caribbean Tourism Quality Index

This research, and the insights gleaned from it, will be shared with San Luis Obispo County and its stakeholders as part of this process.



# RESONANCE REPORT SAMPLES



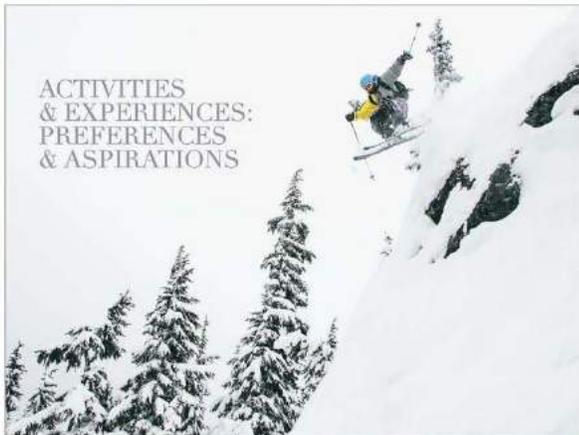
### DEMOGRAPHICS: PROFILE OF THE U.S. MILLENNIAL TRAVELER

Compared to all Millennials, those who travel are more highly educated, wealthier and more frequently married with children. Compared to all travelers, however, they have lower average incomes and net worth.

Millennials are the most highly educated generation in American history, according to the Pew Research Center, and Millennial travelers are even more highly educated. Sixty-four percent of respondents had at least an undergraduate degree, and nearly a quarter had graduate degrees. This is almost double the number cited in a Pew report last year, in which they stated that a third of older Millennials (then aged 26 to 33) had a college degree.

Two-thirds (66%) of our respondents are employed full-time, which is approximately the same (60%) as all Millennials, according to the U.S. Census Bureau's American Community Survey. However, Millennial travelers are decidedly more affluent than their non-traveling counterparts: the vast majority (81%) have incomes over \$50,000. What this tells us is not that Millennials are wealthier than we've been led to believe (indeed, according to the ACS, 26% of the generation live in poverty), but with household incomes lower than \$50,000, it's difficult to have enough disposable income to travel in the first place.

While a smaller percentage of Millennial travelers own their own home (57%) compared to all American travelers (62%), this isn't unexpected, given that the youngest respondents could still be in high school. What is surprising, however, is that 57% percent of Millennial travelers are married, and slightly more than half (54%) have children. These Millennials are clearly different than the hipsters living in their parents' basements.



### SEGMENTATION: U.S. MILLENNIAL TRAVELERS

#### SEGMENT SUMMARY

- Compared to general travelers, Millennial travelers are more likely to be eager All-in Enthusiasts, who are interested in taking all types of vacations and participating in most activities while on vacation.
- Millennials are less likely to be Sophisticated Explorers, who enjoy visiting cultural attractions and learning new things. They are also less likely to be Occasional Convenience Travelers who want to travel to destinations where English is spoken and U.S. currency is accepted.

Segment	Demographics	Key Characteristics	Vacation Preferences
<b>Sophisticated Explorers</b> 6%	<ul style="list-style-type: none"> <li>More female (74%)</li> <li>Smaller household size</li> <li>Less likely to have children at home</li> </ul>	<ul style="list-style-type: none"> <li>Take fewer vacations per year to destinations further away</li> <li>Less likely to travel by car, train or bus to get to destination</li> <li>Higher average vacation spend</li> </ul>	<ul style="list-style-type: none"> <li>More likely to plan to travel to Europe in next 2 years</li> <li>More likely to enjoy sightseeing, visiting cultural attractions and learning new things</li> <li>Tend to do a bit of research prior to going on vacation and see that exploring new cultures and traditions while on vacation is important</li> </ul>
<b>All-in Enthusiasts</b> 47%	<ul style="list-style-type: none"> <li>More male (64%)</li> <li>High % working full time (72%)</li> <li>High incidence of children at home (77%)</li> <li>Larger household size (3.4)</li> </ul>	<ul style="list-style-type: none"> <li>Like to travel by all modes of transportation</li> <li>More frequent trips per year</li> </ul>	<ul style="list-style-type: none"> <li>Interested in taking most types of vacations</li> <li>All factors are important when deciding on a destination</li> <li>More likely to participate in most types of activities</li> <li>Go on vacations for all the different reasons</li> </ul>

### COMPARED TO THE GENERAL TRAVELER, MILLENNIAL TRAVELERS ARE MORE LIKELY TO BE ALL-IN ENTHUSIASTS AND LESS LIKELY TO BE SOPHISTICATED EXPLORERS AND OCCASIONAL CONVENIENCE TRAVELERS.

#### SEGMENT SIZING

**MILLENNIAL TRAVELERS**  
(n=1,185)

**ALL TRAVELERS**  
(n=3,379)

### SOPHISTICATED EXPLORERS ARE LESS LIKELY TO HAVE CHILDREN AND TEND TO LIVE IN SMALLER HOUSEHOLDS.

#### NET WORTH

<\$25K	67%
\$25K to <\$1M	26%
\$1M+	7%

#### EMPLOYMENT STATES

Full-time	61%
Part-time	7%
Self-employed	2%
Retired	<1%
Not employed/student/homeowner	23%

#### CHILDREN IN HOUSEHOLD

Children	27%
No children	73%

#### HOUSEHOLD SIZE

1	25%
2	40%
3 to 4	31%
5+	4%

**AVERAGE SIZE:** 3.3 (vs 3.1)

For further information and to download reports visit [ResonanceCo.com/Our-Reports](http://ResonanceCo.com/Our-Reports)

# RESONANCE EXPERIENCE

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In the pages that follow, we've provided highlights of six case studies that we believe are particularly relevant to this assignment with a broad cross-section of work associated with: urban tourism, rural tourism, regional tourism, extensive stakeholder engagement, trend analysis, steering committee engagement and facilitation, implementation planning and guidance for strategic use of tourism-related funding.

First is our work for Portland, Oregon, one of the nation's leading tourism destinations, as it seeks to look forward 20 years into the future, using a Tourism Master Planning process led by Resonance to design a visitor destination for 2035 and beyond that will be vibrant, dynamic and robust.

Second is our work for Snohomish County, Washington, to update their Strategic Tourism Plan at a time when the County Tourism Department is re-visioning and re-organizing, and the Tourism Bureau is seeking to professionalize its efforts and increase its return on investment.

The third discusses our Phase I research (including Tourism Asset Mapping) for the City of Bellevue, Washington in preparation for the Phase II visioning of a Destination Development Strategy.

The fourth, illustrates our project undertaken last year to produce a Destination Development Strategy for the Tulsa, OK, regional area, combining tourism development with enhancing residents' quality of life and broader attraction of investment and talent to the city.

The fifth explains our work from 2014/2015 with Cincinnati USA to conduct a Destination Assessment and Growth Strategy.

The last case study explains our role to help Tourism Vancouver, the City of Vancouver and Vancouver Economic Commission jointly develop a comprehensive Tourism Master Plan for the City of Vancouver, B.C. This initiative was coordinated with the city's strategy to become the world's greenest and most sustainable city by 2020.



## PORTLAND, OREGON — TOURISM MASTER PLAN

Resonance Consultancy was selected by Travel Portland from a short list of firms to produce a Tourism Master Plan for the City of Portland, Oregon that seeks to identify and articulate a future vision and development strategy for Portland as a leading Travel & Tourism destination 20-years into the future. The project builds on Portland’s identity as a leading leisure and business destination that provides a high quality unique visitor experience ranging from outdoor recreation, to urban adventure to world renown culinary, craft breweries and wineries. For this project, Resonance applied its proprietary competitive destination assessment research, engaged in significant stakeholder engagement to identify strengths, weakness, opportunities and threats, conducted a product / market match assessment, and produced a visitor appeal assessment of existing tourism assets. The key issues and opportunities resulting from this research will be prioritized, detailed and presented to the City Council in Phase 2 for agreement and implementation.

**Areas of Practice:**

Destination Development Planning

**Services:**

- SWOT Analysis
- Competitive Assessment
- Stakeholder Engagement
- Visitor Appeal Analysis
- Market / Product Match Assessment
- Strategic Planning

**Client:** TravelPortland

**Location:** Portland, Oregon

**Year:** 2016-Present



## SNOHOMISH COUNTY WASHINGTON — TOURISM STRATEGIC PLAN UPDATE

Snohomish County Washington awarded Resonance Consultancy this project from an open RFP process to update the County’s Tourism Strategic Plan last issued in 2010. The objective of the project was to determine the priority use of funds for destination development, marketing and promotion and detail a new set of strategies, plans, programs, protocols, funding and responsibilities to be implemented by Snohomish County Parks, Recreation and Tourism as well as the authorized tourism marketing organization, Snohomish County Tourism Bureau. The final drafting of the Tourism Strategic Plan is in process.

**Areas of Practice:**

Destination Development Planning  
Tourism Marketing Strategy

**Services:**

SWOT Analysis  
Competitive Assessment  
Stakeholder Engagement  
Lodging Tax Funding Analysis  
and Forecast  
Visitor Survey and Market  
Segmentation Analysis  
Strategic Planning and Implementation

**Client:** Snohomish County, Washington

**Location:** Snohomish County, Washington

**Year:** 2016-Present



## BELLEVUE, WASHINGTON — DESTINATION DEVELOPMENT STRATEGY

The City of Bellevue Washington (Economic Development Department) in cooperation with Visit Bellevue Washington selected Resonance Consultancy thru an RFP process to develop a Destination Development Strategy for Bellevue to identify hardware, software and protocols for the future development of Bellevue as a business and leisure destination.

For Phase 1 of this project, a Conceptual Framework was drawn from the individual pieces and collective body of research conducted for the project, which suggested a number of emergent findings and potential directions grouped into 7 general themes including: Infrastructure Development / Hardware / Physical Assets; Market Segments / Visitor Groups; Visitor Activities / Product Development Opportunities; Destination Operations; Regionalism; Destination Differentiators; and Professionalizing the DMO. Phase 2 of this project, which includes the articulation and consensus of the strategy, is in process.

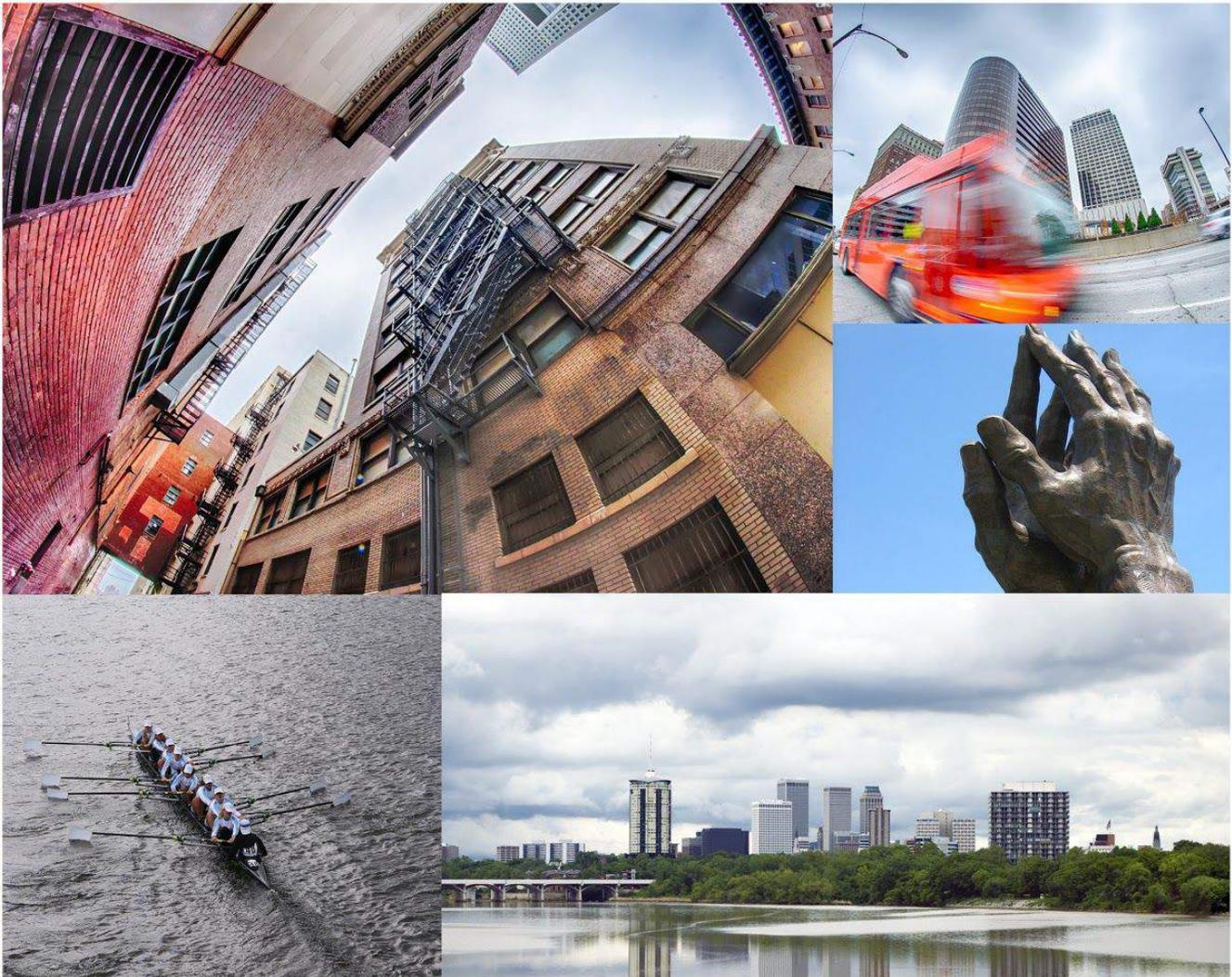
**Areas of Practice:**  
Destination Development

**Services:**  
SWOT Analysis  
Competitive Assessment  
Stakeholder Engagement  
Strategic Planning

**Client:** The City of Bellevue Washington (Economic Development Department) and Visit Bellevue Washington

**Location:** Bellevue, Washington

**Year:** 2016-Present



## TULSA, OKLAHOMA — DESTINATION DEVELOPMENT STRATEGY

Resonance Consultancy has been commissioned by the Tulsa Regional Chamber and VisitTulsa to produce a Destination Development Strategy for the Tulsa, OK regional area. The vision for the project was to bring together the development of Tulsa’s competitive identity, economic development strategy and urban planning in order to create a series of interrelated and interdependent strategic recommendations that will define: Tulsa’s unique essence, community DNA and competitive identity; a business strategy for achieving leadership that drives economic impact; and a vision for how Tulsa should shape and plan its physical/geographical assets to create a stronger sense of place.

**Areas of Practice:**

Destination Development Planning  
Brand Strategy

**Services:**

SWOT Analysis  
Competitive Assessment  
Community Communications  
Community DNA & Competitive Identity

**Client:**

Tulsa Regional Chamber  
and VisitTulsa

**Location:** Tulsa, Oklahoma

**Year:** 2015-present



## CINCINNATI USA — DESTINATION DEVELOPMENT STRATEGY

Resonance Consultancy was selected by three tourism partners from the Cincinnati USA market area (Cincinnati USA Convention & Visitors Bureau CCVB, Northern Kentucky Convention and Visitors Bureau NKCVB, and Regional Tourism Network RTN) to conduct a Destination Assessment and Development Strategy for the Cincinnati USA market area. The goal: “take the partners’ collaboration to new tactical and strategic levels” to work toward the creation of a 10-20 year unified strategic plan to sustainably grow the travel and tourism industry.

Working in partnership with Tourism Economics, Resonance Consultancy assisted the Partners to develop a destination asset assessment; conduct an analysis of product and service gaps and opportunities; and deliver a development and positioning strategy focused principally on the visitors of the future.

**Areas of Practice:**

Destination Development Planning  
Brand Strategy

**Services:**

SWOT Analysis  
Competitive Assessment  
Visitor, Resident and Stakeholder Research  
Economic Research and Growth Modeling

**Client:**

Cincinnati USA CVB, Northern Kentucky CVB and Cincinnati USA Regional Tourism Network

**Location:** Cincinnati USA

**Year:** 2014 - 2015



## VANCOUVER TOURISM MASTER PLAN

Tourism Vancouver wanted to guide the long-term planning of Vancouver by identifying potential products, amenities, programming and experiences. Resonance was engaged through an international RFP selection process.

- 180 interviews with stakeholders resulted in an understanding of issues and opportunities; a TVan charette focused on key takeaways.
- Vancouverites were engaged via a website and blog. An online survey and video encouraged input: 2,200 people and 11,000 comments resulted.
- Eight areas of focus emerged: transportation, visitor experience design, infrastructure and product development, neighborhood tourism, advocacy, public affairs, partnerships and alliances.
- The heads of City departments and councillors heard presentations.

The Vancouver Tourism Master Plan was presented to TVan members and the press at TVan’s annual general meeting. Vancouver Mayor Gregor Robertson participated. Recommendations were offered in the eight areas of focus; the City and Tourism Vancouver committed to their realization.

**Areas of Practice:**

Tourism Master Planning

**Services:**

Issues and Opportunities Analysis  
Stakeholder Engagement  
Visitor, Resident and Stakeholder Research

**Client:**

Tourism Vancouver  
City of Vancouver  
Vancouver Economic Commission

**Location:** Vancouver, Canada

**Year:** 2012-2013

# TOURISM ECONOMICS EXPERIENCE

Tourism Economics staff have been conducting relevant economic impact analysis for 20 years. Tourism Economics has been in business for 10 years.

## **Scope: Economic Impact of Tourism**

**Clients: 17 states, 200+ cities, 20+ countries**

**Description:** Tourism Economics regularly updates analysis for governments seeking to understand the economic contribution of tourism activity on their city, state, or country. Past U.S. state experience of the TE team includes: North Carolina, Kansas, Connecticut, South Carolina, Delaware, New Jersey, New York, Florida, Pennsylvania, Michigan, Minnesota, Missouri, New Mexico, North Dakota, Ohio, South Dakota, Wisconsin, Maryland, and Georgia. We have conducted Tourism Satellite Account analysis for seven states and more than 20 countries worldwide. We also conduct global TSA summary analysis for more than 150 countries in support of the World Travel & Tourism Council.

Public examples of our work include:

<http://www.visitnj.org/new-jersey-tourism-research-and-information>

<http://www.visitpa.com/economic-impact-travel-report>

<http://www.wttc.org/research/>

<http://industry.visitmo.com/Portals/1/FY13%20Economic%20Impact%20%20Exec%20Summary.pdf>

## **Scope: Economic Impact of Events**

**Clients: 175 DMOs/State Tourism Offices across the U.S.**

The DMAI Event Impact Calculator is an online economic impact analysis tool designed by Tourism Economics for CVBs to calculate the economic value of trade shows, conferences, and other events on their destination. The platform is the established industry standard for economic impact analysis among CVBs.

<http://www.destinationmarketing.org/topics/event-impact-calculator>

## **Scope: Economic Impact of Business Travel**

**Client: U.S. Travel Association / World Travel & Tourism Council**

Tourism Economics quantified the economic impact of business travel on overall corporate and national economic performance for the U.S. and for each world region.

**Scope: Effectiveness of the San Diego CVB (Similar research conducted for Brand USA, Discover Los Angeles, and Lancaster County CVB)**

**Client: San Diego Tourism Marketing District**

**Description:** Tourism Economics assessed all of the SDCVB marketing and promotion activities to determine the magnitude of their impact. We then looked at the ROI of the overall program and the distribution of benefits across industry stakeholders.

**Scope: Funding scenarios**

**Client: Destination DC, Los Angeles TCB, Coronado CVB, Colorado Springs, Visit Britain, Canadian Tourism Commission, Visit California, Experience Columbus**

**Description:** For each of the above organizations, Tourism Economics conducted separate scenario analysis of increased funding and its potential impact on visitation, spending, and economic activity. These analyses were based on models of future performance with respect to past campaign ROI for each of the destinations of a variety of origin markets.

**Scope: Visitor Opportunity Market Assessment**

**Client: Visit Britain, Netherlands Tourism, NYC & Company, Visit Orlando, Visit Sweden, PromPeru, Visit California, Visit Florida**

**Description:** A Market Analysis Platform (MAP) was developed for the client that ranked the relative strengths and weaknesses of a broad array of international markets. The MAP combined a wealth of economic forecasts and other relevant indicators for each market to determine a series of scores for each market according to factors such as market size, opportunity, alignment, risk and constraint. By combining the scores for each of these factors the relative attractiveness of each origin market can be determined to inform how a marketing budget can be allocated across the markets. This platform allows flexibility in which markets are analyzed and compared as well as which factors are considered to be important in determining relative opportunity.

**Scope: Return on Investment Model for Canada**

**Client: Canadian Tourism Commission (CTC), Atlantic Canada, Travel Alberta**

**Description:** Tourism Economics added to existing CTC research on the allocation of marketing investment across key overseas origin markets. Whereas previous analysis had focused on market opportunities, we widened the scope to consider market risks and constraints. Return on investment multiples were estimated for each market based upon existing conversion studies and other measures of opportunity. These were combined with estimated risk values for each market using optimal portfolio analysis. Multiple combinations of allocating marketing investment were compared and the optimal portfolios which deliver the highest estimated return for a given risk threshold were calculated.

**Scope: Visa Waiver Program expansion analysis**

**Client: U.S. Travel Association**

**Description:** Tourism Economics developed a model based on historical benefits of the Visa Waiver Program to evaluate the likely gains that would be realized through expanding the eligibility criteria to include 10 new countries.

**Scope: The economic impact of visas impeding participation in U.S. exhibitions****Client: The Center for Exhibition Industry Research**

**Description:** Tourism Economics assessed the broad economic losses of non-participation in U.S.-based exhibitions as a result of visitor visa issues. This analysis quantified two broad categories of U.S. export losses from business-to-business (B2B) trade shows (exhibitions). 1) Foregone spending by would-be attendees— affecting international demand for hospitality services as well as a wide range of spending at the event itself. (These are measured as service exports in balance of trade measures). 2) Lost exports of U.S. companies that are unable to meet with current or potential prospects.

**Scope: Economic impact of tourism and the I Love New York campaign****Client: New York Association of Convention and Visitors Bureaus**

**Description:** Tourism Economics developed a county-by-county tourism economic impact model to measure visitor spending and related jobs, wages, and taxes. The model quantified tourism value added across each affected industry. We then quantified the impact of the I Love New York campaign across the same metrics using the output of a separate marketing conversion study.

**Scope: U.S. Domestic Tourism Forecasting****Client: U.S. Travel Association**

**Description:** U.S. Travel has provided forecasts of domestic travel to the industry at large for over a decade. Tourism Economics was approached to construct a new model of U.S. domestic tourism to generate these forecasts. This model separately tracks and forecasts travel flows according to market segment (business, leisure), mode of transportation and trip length (day, overnight). The model considers domestic travel relative to international travel and also considers substitution between these different types of domestic trips. Key model drivers are forecasts taken from Oxford Economics' U.S. macroeconomic model as well as the TIA travel price index.

**Scope: Hotel market forecasts****Client: Smith Travel Research**

**Description:** Tourism Economics is STR's forecast partner, developing market-level forecasts of hotel demand, supply, ADR, occupancy, and RevPAR for over 70 markets worldwide.

**Scope: State of California Tourism Forecasting****Client: California Travel & Tourism Commission**

**Description:** Tourism Economics conducts periodic forecasts of travel demand for the state of California. These forecasts and related analysis include domestic and international market detail.

# RESONANCE REFERENCES

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**Bob Miron**

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# APPROACH & METHODOLOGY

The Travel & Tourism industry has undergone a period of extreme change over the past 10 years. Travelers' motivations and financial circumstances have shifted, leaving many destinations that were well positioned just a decade ago adrift in the current environment. At the same time, this market dislocation is creating opportunities for new travel and tourism destinations and products to satisfy the needs and desires of both today's and tomorrow's anticipated travelers. Correctly identifying and understanding these aspirations and needs, and developing a corresponding Destination Development Plan that will resonate with both today's and tomorrow's anticipated travelers, will help San Luis Obispo County reach its goal of realizing travel and tourism's full economic potential.

Our approach to the creation of a Destination Development Plan is designed to help stakeholders articulate and share a clear vision for the future—because when people share a vision of the future, it gives them shared belief, shared purpose and shared passion. Our approach seeks to define a destination as more than the sum of its parts. While the Destination Development Plan will address critical hardware, such as transportation and attractions, that is required to achieve San Luis Obispo County's goals, it will also address the software of relationships and programming required to foster the culture and experiences necessary to create a unique and compelling sense of place.

Our experience has also taught us that successful destination development planning requires the participation and alignment of not only industry stakeholders, but those of both the visitor and your local community as well. As such, our approach is designed to not only consult, but also engage and collaborate with your tourism industry stakeholders, visitors and community.



Our approach is also designed to:

- Provide a rigorous set of research activities and efforts necessary to deliver a comprehensive Destination Development Plan to guide San Luis Obispo County for the years ahead;
- Create a public and transparent operational approach process to the project so all interested parties can see the activities taking place, monitor project status and be assured that deliverables are on target;
- Create an “apolitical” project environment with an independent and unbiased approach to the issues at hand to help assure that all stakeholders, including San Luis Obispo County, partner stakeholders and organizations, receive the best recommendations and advice possible;
- Create several methods of input and collaboration with stakeholders from all interested groups (tourism industry, government, community residents and Visit SLO CAL), so there is ample opportunity to contribute wide-ranging and diverse opinions to the project; and
- Work closely with Visit SLO CAL to formulate, draft and finalize the Destination Development Plan conclusions and recommendations.

Our process will help you identify, innovate, create and articulate unique products, amenities, programming and experiences—along with the policies and protocols required—to guide the long-term planning and design of San Luis Obispo County as an important travel and tourism destination.

The Destination Development Plan will:

- Create consensus among your stakeholders of the trends impacting your industry and the threats and opportunities they represent;
- Assess and define the product development needs of San Luis Obispo County, its tourist attractions, services, facilities and transportation;
- Identify growth and expansion opportunities for San Luis Obispo County’s travel and tourism industry with respect to market realities;
- Identify travel and tourism industry actions and activities that can benefit the local economy and social well being;
- Provide policies to inform and direct planning and development in a manner that supports travel and tourism development goals and objectives;
- Focus use of the lodging taxes and other funding mechanisms to advance the adopted strategy;
- Be used as a management tool to prioritize the use of resources to achieve general and specific goals established through the process; and
- Be used as an information resource in conducting individual agency, business or organization planning processes and operations.

## Project Management

In recognition of the importance of coordinating a broad range of activities and tasks for this project, and the need to maintain close liaison with the Steering Committee and good relations with the key stakeholders, we have built specific provisions into this proposal to ensure the effective and efficient delivery of the assignment. This will also ensure the necessary consistency between all of the outputs both in terms of the reports themselves as well as their timely production in line with the proposed program of activity. Our general approach to project management encompasses a number of distinct aspects, which are outlined as follows:

- A core principle of our approach will be open, honest and regular communication with the Steering Committee and the stakeholders. This approach offers the best potential for securing consensus between all the parties to the assignment.
- Regular communication is critical to ensuring that emerging findings are understood by the relevant stakeholders and the partners and that any emerging outputs meet with everyone's expectations.
- Our approach will also involve regular reporting on project progress throughout the project. Resonance Consultancy utilizes a Cloud-based time-tracking and reporting system ensuring that weekly project status reports are available detailing the work incurred by each team member on a daily basis.
- Resonance Consultancy utilizes the GoToMeeting platform, which enables screen sharing and participant video conferencing to enable regular virtual meetings with participants in a range of geographic locations.

More specifically;

- At an operational level, we will provide regular updates on progress against the proposal, contract and work plan.
- At a client team level, we envisage having a series of short and timely meetings to initially discuss and agree upon our approach to the study and subsequently to facilitate the feeding back of outputs and results.
- Resonance partner and Executive Vice-President Richard Cutting-Miller will be the key contact on a day to day basis to ensure that the Steering Committee and stakeholders are always provided with an executive level and central point of contact.

From Visit SLO CAL's perspective, we expect a mid-level professional be assigned to direct, manage and facilitate the Steering / Stakeholder Committee, county and local officials, and industry stakeholders. This project manager will also need to assist in organizing meetings, facilities, logistics, collection of research, documents and other materials. He/she will also act as a conduit to organizations and individuals that will be participating in some way in the project.

These mechanisms should ensure that updates are provided promptly on project progress, a two-way exchange of views on a regular basis is facilitated and the Visit SLO CAL's required timescale is met. We are flexible in our approach to the nature and format of this assignment and fully appreciate the complexities involved. Therefore, our approach will be fluid and responsive to the emerging requirements that arise throughout the process.

There will be a checkpoint review at the end of each stage of our methodology, at which point the team will meet to discuss process and issues arising.

## Steering / Stakeholder Committees

It is not unusual for Resonance Consultancy to work with and for a committee or stakeholder group in its tourism consulting work.

For example, the Vancouver Tourism Master Plan completed by Resonance was partnered by three organizations: Tourism Vancouver, the City of Vancouver and Vancouver Economic Commission (VEC).

- Tourism Vancouver – As the authorized official Destination Marketing Organization for Vancouver, Tourism Vancouver leads the effort to bring visitors to the city.
- The City of Vancouver – Has also been an active partner in the development of the Tourism Master Plan, contributing expertise, advice and resources to all aspects of its development.
- The Vancouver Economic Commission – Works to strengthen the city's economic future by helping existing businesses, attracting investment, researching the business environment and making policy recommendations.

For this project, the Tourism Master Plan partners created a Steering Committee that monitored and managed the process and provided feedback to Resonance on the research, conclusions and recommendations.

In the development of the project, Resonance was thoroughly engaged with the project Steering Committee to review and agree on the project output, but was also required by extension to gain the buy-in, support and signoff of the Tourism Vancouver Board of Directors, the City of Vancouver's Senior Management Team, City Manager and Mayor, as well as the Senior Management of the Vancouver Economic Commission.

To illustrate Resonance's success with this large collection of stakeholders, the Master Plan was officially launched by the Mayor of Vancouver—who also represented the Vancouver Economic Commission along with the Chairman of Tourism Vancouver at the Annual General Meeting of Tourism Vancouver. The launch was a major public event and made front-page news.

For this project, we anticipate working with the Visit SLO CAL Steering / Stakeholder Committee and staff on a regular basis and will organize, host and facilitate steering / stakeholder committee and staff meetings spaced throughout the planning process. The actual meeting schedule will be agreed at the kick-off meeting and coincide with the start / finish of specific activities or regular dates (ie. monthly) depending on the project calendar.

We recommend that the Steering / Stakeholder Committee for this project include a representative from each of the 8 municipalities, Visit SLO CAL plus two or three county-wide representatives. Keeping the Steering / Stakeholder Committee to twelve or less will allow the Project Team to discuss the details of the project with the Committee and receive detailed feedback.

# I // KICK-OFF & STAKEHOLDER ANALYSIS

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Anytime an organization embarks on a visioning process, various stakeholders will be affected. Failing to proactively involve and respond to stakeholders can lead to negative outcomes, conflict, miscommunication and a failure to launch the plan successfully. To increase the success rate of your tourism strategy initiative, we consider it important to engage stakeholders right from the beginning: understand who they are, how they will be affected and what steps we can take to maximize their engagement and guide them in the participation, adoption and successful implementation of the plan.

We will work with the client team to identify the best makeup of the project Steering Committee. We will meet with staff of Visit SLO CAL throughout the project to ensure the final plan is an effective tool for the organization.

The Kick-off & Stakeholder Analysis will take place with the project Steering Committee and will include:

- Introductions, orientation and project kick-off between the Project Team (Resonance Consultancy) and the committee designated representatives.
- Discussions regarding Visit SLO CAL staff roles, responsibilities and requirements for project direction, management and facilitation.
- Collection of all secondary research including existing consumer research and other appropriate sources.
- Detailed project planning between Project Team and Visit SLO CAL staff to coordinate the “Research & Analysis” phase.
- Stakeholder analysis and engagement planning.

The Stakeholder Analysis we perform is used to identify and investigate the “force field” formed by any group or individual who can affect or is affected by this initiative. We will begin with a broad definition of the term stakeholder—it will include those who have an interest or a stake in the project; those who are likely to be affected by the project, those who may influence the project’s outcomes, as well as the beneficiaries of the project. While it must be acknowledged that the purpose of engagement may change over the course of the life of the project, the identification and selection of stakeholders is an important consideration as it will guide the choices concerning who should be involved, how participation is organized; how ideas are taken on board and how a coalition of support around the strategic plan can be built.

In collaboration with the client team we will conduct a stakeholder mapping exercise to identify who we need to involve in terms of key people locally, regionally and nationally; the agencies who represent the interests of travel

and tourism, airports, local government, the environment; community interests; existing operators etc. We will also identify 'significant others' such as potential influencers who will be key to the successful development of this initiative. In undertaking the stakeholder mapping we will use a participation planning matrix—a technique that acknowledges the notion of a spectrum of levels of participation and ranks the significance of consultees accordingly. The levels of participation range from a minimum of simply obtaining information and informing stakeholders, through to consulting in one-on-one meetings. The details of the actual discussions are discussed later in this document: 4 // Stakeholder Engagement.

The number of stakeholders selected for this project depends on how many people will be interviewed individually and how many will participate in a group setting. Assuming one-man week of interviews, the number can range from 30-35 people individually to 160-200 people in group sessions.

To maximize input and contribution, we suggest that Visit SLO CAL begin by determining which individuals should be interviewed one-on-one (usually 45 minutes) and then fill the remainder of the allocated time with group sessions (usually 1 hour 15 mins and up to 8 participants).

# 2 // ECONOMIC IMPACT ANALYSIS

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Tourism Economics will carry out this portion of the Destination Development Plan process.

Most economic sectors, such as agriculture and financial services, are easily defined within a state's economic statistics. This is because these are distinct sectors with measurable employment and production value.

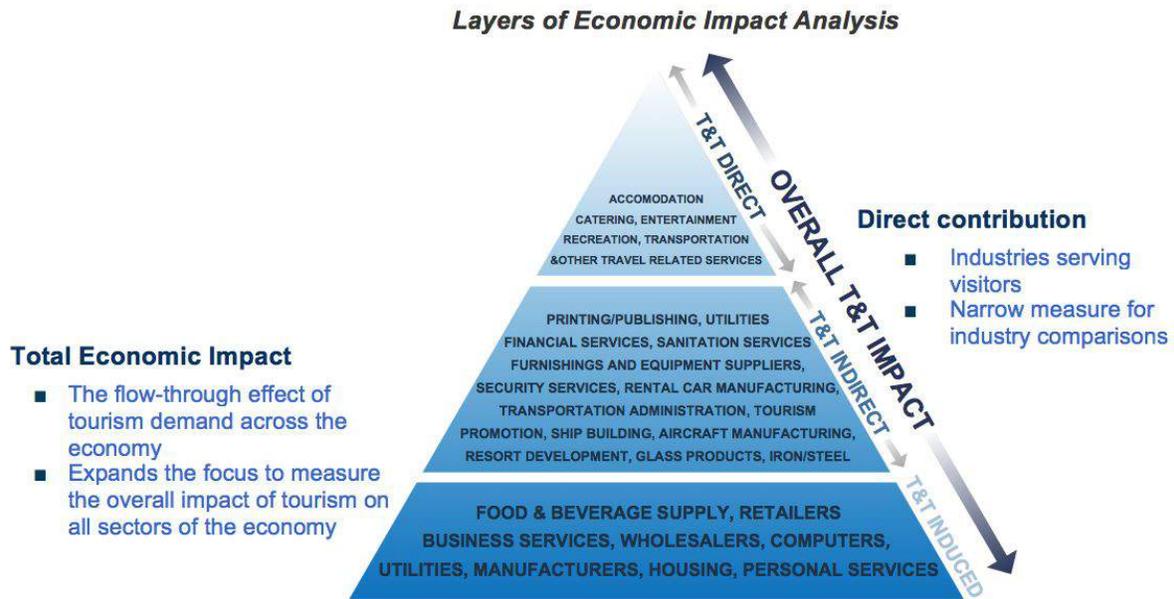
The travel sector is not so easily measured because it is not a single industry. Travel spans nearly a dozen sectors including lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, and travel agents. It is intrinsically a demand-side activity, defined by visitors, which affects multiple sectors to various degrees.

Economic impact analysis deals with the challenge of measuring tourism in two important ways. It defines the tourism economy and then provides a methodology for calculating tourism GDP and employment in a way that is consistent with standard industry accounts.

This provides a number of critical benefits to the promotion of tourism development:

- Enabling comparisons of the importance of tourism to other sectors of the economy;
- Tracking the economic contribution of tourism over time; and
- Measuring the full economic value of tourism, including direct, indirect, and induced impacts.

The following diagram illustrates the scope of the analysis, which measures the direct impacts of travel & tourism (T&T) which can be compared to other sectors and also allows for an analysis of the sector’s full economic impact.



We have extensive experience in this area as our team currently manages economic impact analysis for over 15 states and hundreds of cities/counties each year.

**Methodology and Management Plan**

Our tourism economic impact methodology is centered on several important principles:

- Clear communication of methodology and results to maximize relevance to stakeholders;
- Credibility grounded in consistency with San Luis Obispo County tax statistics, STR, US Bureau of Economic Analysis (BEA), Census, and Bureau of Labor Statistics (BLS) reported data;
- Ability to benchmark and rank tourism within the total economy; and
- A comprehensive system of measurement.

The Tourism Economics team will take the following steps in the development of the tourism economic impact analysis for San Luis Obispo County and the 8 municipalities (where possible) for the latest travel year (2016 or 2017) plus four prior years.

### **Step 1 - Compile diverse data sets to measure visitor expenditures**

The analysis will begin with a compilation of all relevant data sets that will be used as inputs to the model. Tourism spans many different activities and sectors so a number of perspectives must be brought together to quantify each component of the tourism economy.

We will use these different perspectives to complement and to cross-check one another. The data sets to be compiled include:

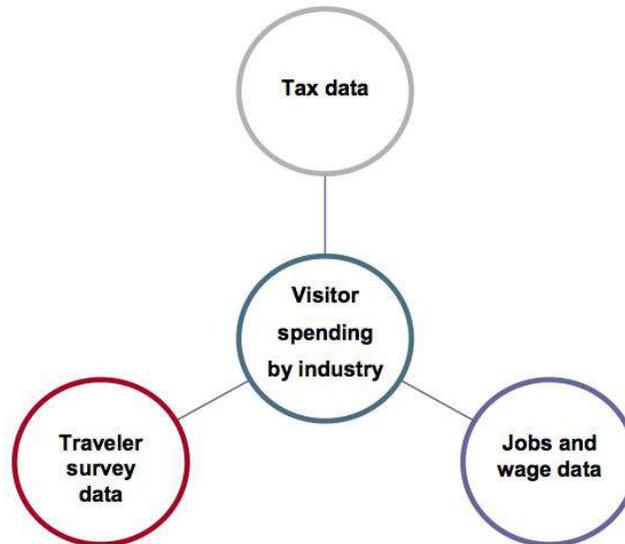
- Visitor volume and expenditures by category (lodging, retail, public transportation, automobile transportation, food service, entertainment/recreation, travel arrangement). This will be drawn from inputs data for domestic visits and spending by visitor type and by category of spending to be purchased as a model input. Tourism Economics has worked extensively with inputs data from all major survey providers over the past two decades.
- Employment (NAICS 700+ industries, source: BEA, BLS, US Census) – by industry and county
- Wages (NAICS 700+ industries, source: BEA, BLS, US Census) – by industry and county
- Value Added (NAICS ~50 industries, source: BEA) – by industry at the state level
- Lodging revenue and average daily rates (Smith Travel Research) – state and county detail
- NM Department of Revenue – taxes by type and by industry
- Bed tax receipts - by county/city
- US Census data on seasonal second homes by county
- National Travel and Tourism Organization (NTTO) data on international overseas inbound traveler expenditures (state-level), supplemented by Tourism Economics research
- Aviation-related spending for visitors based on airport and passenger data (collected from airports and OAG)

This comprehensive set of data will provide a holistic view of visitor activity that is constrained by known measurements. These datasets complement and cross check one another. For example:

1. Tax receipts data by industry will provide measurements of revenue for industries providing tourism goods and services.
2. This will be compared to spending estimates derived from syndicated visitor expenditure estimates.
3. This will further be compared to employment and wage data by industry to cross-check the total size of each related industry and the implicit share of tourism for each industry.

This “triangulation” approach provides a set of anchors so that the end results are consistent and credible.

**Example of data cross-check method**



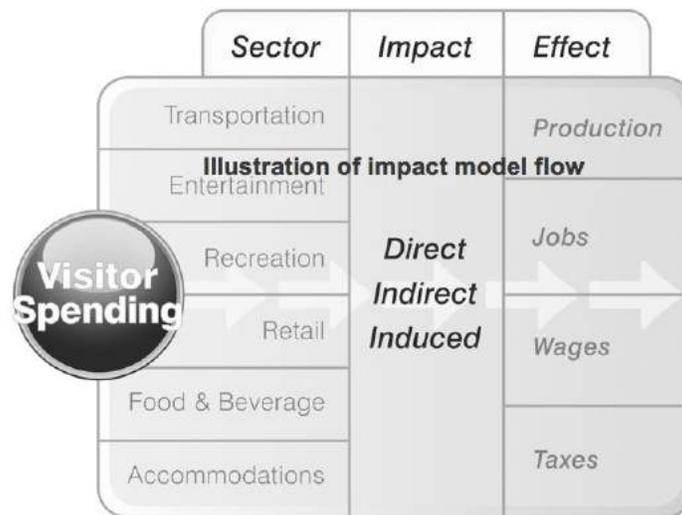
Visitor survey data will allow for segmentation of impacts by visitor type and by category of spending. This analysis will break down visitor expenditures by type for determining the tourism share of sectors which are only partially tourism-related such as restaurants. BEA employment data will provide an overarching perspective on the total jobs (whether or not generated by tourism) within each tourism-related sector. This will be used as a reasonableness check of the economic model results.

**Step 2 - Develop impact analysis**

Our team will then employ an Input-Output (I-O) model for the San Luis Obispo County based on an IMPLAN ([www.implan.com](http://www.implan.com)) model. IMPLAN is recognized as an industry standard in local-level I-O models. An I-O model represents a profile of an economy by measuring the relationships among industries and consumers. For example, an I-O model tracks the flow of a visitor’s restaurant expenditures to wages, profits, capital, taxes and suppliers. The supplier chain is also traced to food wholesalers, to farmers, and so on. In this way, the I-O model allows for the measurement of the direct and indirect sales generated by a restaurant meal. The model also calculates the induced impacts of tourism. These induced impacts represent benefits to the economy as employees of tourism sectors spend their wages in the local economy, generating additional output, jobs, taxes, and wages.

IMPLAN is particularly effective because it calculates these three levels of impact – direct, indirect, and induced – for a broad set of indicators including:

- Business sales (also called gross output)
- Value Added (GDP/Gross State Product)
- Personal Income (Payroll and other income)
- Employment
- Federal Taxes
- State Taxes
- Local Taxes



The modeling process begins with aligning the tourism expenditure measurements with the related sectors in the model (e.g. restaurants, retail, and recreation). The model is then run to simulate the flow of these expenditures through the economy. In this process, the inter-relationships between consumers and industries generate each level of impact for each economic indicator (sales, wages, employment, etc.).

Tourism Economics will then iteratively adjust the model to balance the results with known industry measurements. IMPLAN is flexible, allowing for adjustments in coefficients. This ensures that the results of the model are consistent and reasonable compared with other sources of specific tourism sector employment and taxes.

Figures will be segmented by industry—including those industries which benefit indirectly. This will provide valuable insights into the relative value of visitor segments as well as the extent to which various industries benefit from visitor activity.

Direct impacts will be provided by industry (e.g. accommodation, food service, retail, recreation, transportation). Indirect and induced impacts will be provided across all industries at the one-digit level (e.g. agriculture,

construction, manufacturing, finance and insurance) to show the linkages of visitor spending in supporting economic activity in other parts of the San Luis Obispo economy.

The impact of business travel, leisure travel, and stays at seasonal second homes will be assessed individually and as part of the whole.

A detailed tax analysis will combine IMPLAN output with bottom-up calculations of sales taxes, bed taxes, and other tourism-specific taxes to complement the standard model results. Tax impacts will include the following detailed line items.

## Federal Taxes

- Corporate
- Indirect Business
- Personal Income
- Social Security

## State Taxes

- Corporate
- Personal Income
- Sales
- Entertainment
- State Unemployment
- Dividends
- Other taxes and fees

## Local Taxes

- Sales
- Property
- Lodging
- Excise and Fees
- Personal Income
- Other taxes and fees

In addition to the absolute value of taxes, these will be expressed as “savings in state and local taxes per household” based on the assumption that were it not for visitors, resident households would need to fund these revenues.

The findings will show the share of the economy (income and jobs) generated by visitor activity and will also allow for a ranking of tourism as a stand-alone sector in comparison with other industries in San Luis Obispo County in terms of income and employment. We will also show the unemployment rate with and what it would be without tourism as a powerful statement of the importance of the visitor economy.

The report will be replete with tables and charts to clearly depict the data.

### **Step 3 - Project deliverables**

Tourism Economics will provide a comprehensive report to present the findings at the state and county levels. This report will include tables and charts illustrating the impact of travel and tourism on the San Luis Obispo County economy and 8 municipalities (where possible). A clear and graphical presentation of the results will be accompanied by narrative explaining the concepts and their importance.

Even the best research is only as good as its presentation. The Tourism Economics team will develop a clear and graphical presentation of the results with narrative explaining the concepts and their importance. The report will be accessible to the layperson with a view towards a diverse set of audiences including market analysts, legislators, the media, planners, and other stakeholders.

The results of this analysis are grouped into four main areas:

- **Size**—the magnitude of impact will be quantified in terms of spend, business sales impact, employment, wages, and taxes. Our analysis ensures that all activities are measured, including spending in the vacation ownership, seasonal real estate, aviation, local transport, hospitality, recreation, retail, and restaurant sectors.
- **Segmentation**—the analysis will then segment the impacts by purpose of visit, type of visitor, industry, and level of impact (direct, indirect, and induced).
- **Trend**—by factoring in aviation and tourism-related tax information alongside BLS/BEA data on employment and income, we are given a solid foundation for trend analysis. On this basis, we are able to show how the impact of the visitor economy has evolved over the past five years.
- **Context**—large numbers are more meaningful if given context. Tourism Economics reports provide this in two ways. The first is by calculating the share of the economy (wages, jobs, GDP) attributable to visitors. The second is through a series of creative comparisons of tax, wage, and job impacts with the size of government budgets, impact per minute, and sports venues. For example:
  - Visitor-generated taxes would fund the entire (public school system, police department...) X times over
  - The jobs created by visitor spending would fill \_\_\_\_\_ <venue> X times
  - Visitors to San Luis Obispo County, NM generate more jobs than the X, Y, and Z industries combined

The report will be accessible to the layperson with a view towards a diverse set of audiences. Our proven competitive advantage is the ability to communicate complex information in a way that is understandable, relevant and interesting.

# 3 // CONSUMER RESEARCH AND MARKET ANALYSIS

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The Resonance team has authored research studies on subjects as diverse as vacation homes, outdoor apparel, attitudes toward recreation and affluent travel and leisure. We know that research can be a blunt weapon if not created and used wisely; we hone questions to find out what really connects people to ideas, places and things – the emotions behind their decisions and their positions.

The Consumer Research & Analysis phase for this project will include the following parts:

- Review and analysis of all relevant current travel and tourism studies and plans.
- Review and analysis of market and visitor data, studies and reports.
- Review and analysis of existing consumer research.
- Analysis and reporting of global, national, regional and local consumer and travel and tourism trends.
- Profiling and segmentation study of past visitors utilizing Resonance's proprietary segmentation modeling tool.

It's difficult to market to age groups on a generational basis because they're so big. More effective, then, is to identify psychographic segments, types of travelers who – regardless of age or gender – share similar travel, interest and spending patterns. By approaching marketing from a psychological profile, destinations can focus on types of marketing that appeal to these segments. These also help destinations determine which segment is the best match for their product. Resonance surveys over 4,000 active U.S. and Canadian travelers each year and has created a proprietary segmentation modeling tool that will allow us to profile your database and conduct this segmentation analysis. The segmentation analysis used is both a behavioral and attitudinal segmentation. Three main inputs are used in our segmentation modeling:

1. Most important factors taken into account when deciding on a vacation destination;
2. Activities enjoyed while on vacation; and
3. General attitudes towards vacations.

The resulting segmentation solution identifies five key segments of varying sizes with distinct behaviors and attitudes resulting in different demographic profiles and trip characteristics. Key segments of U.S. and Canadian travelers in our modeling are:

- Sophisticated Explorers
- All-In Enthusiasts
- Active Adventurers
- Occasional Convenience Travelers
- Family-Oriented Frugals

To better understand who the current San Luis Obispo County customer is, how they compare to U.S. travelers in general and what types of travelers might be attracted to the destination in the future, Resonance will create, program and distribute an online survey to engage San Luis Obispo County's database of past visitors.

Objectives of the survey include:

- Assess the quality and satisfaction with current destination services, accommodation and amenities;
- Assess the relative attractiveness of different new amenities and improvements under consideration for the destination; and
- Conduct a segmentation analysis of the database to better understand the San Luis Obispo County guest and how they differ from U.S. travelers in general.

The questionnaire will take respondents approximately 12-15 minutes to complete. To enhance participation in the survey, Resonance recommends providing an incentive such as a free 3-night stay. Once complete, results will be tabulated and a summary report provided to the Steering Committee.

For this survey we would look to SLO CAL for an email list of past visitors. However, if that does not exist, we will search for other visitor list sources such as Facebook, Twitter, Instagram, and other tourism organization / businesses.

# 4 // DESTINATION ASSESSMENT

Resonance’s innovative and proprietary approach to analyzing destinations based on our analysis of millions of online reviews provides destinations with a clear picture of both the quantity and quality of urban and rural experiences offered within the destination across 18 product and service categories. Utilizing Resonance’s analysis of 121 destinations across the U.S., Resonance can provide a customized supply-side assessment of a destination’s travel and tourism assets and experiences utilizing a combination of social media reviews and core performance statistics collected directly from TripAdvisor and Yelp, based on geo-tagging, to benchmark both the quantity of travel and tourism infrastructure and quality experiences offered by your destination against 14 competing destinations of your choice. These destinations can be both regional or aspirational competitors.

Your Destination Analytics report includes measures on:

## 1. Culture

The arts and culture in a destination

- i. Museums (TripAdvisor)
- ii. Theaters & Concerts (TripAdvisor)
- iii. Arts & Events (Yelp)

## 2. Attractions

Fun attractions and experiences

- i. Amusement Parks (TripAdvisor)
- ii. Zoos & Aquariums (TripAdvisor)
- iii. Fun & Games (TripAdvisor)

## 3. Sightseeing

The natural and built environment of a destination

- i. Sights & Landmarks (TripAdvisor)
- ii. Sightseeing Tours (TripAdvisor)

## 4. Nightlife

Evening entertainment

- i. Nightlife (Yelp)
- ii. Casinos & Gambling (TripAdvisor)

## 5. Shopping

Retail experiences

- i. Shopping (Yelp)

## 6. Outdoors

A destination’s outdoor activities and adventures

- i. Outdoor Activities (TripAdvisor)
- ii. Boat Tours & Water Sports (TripAdvisor)
- iii. Nature & Parks (TripAdvisor)

## 7. Culinary

The food experiences in a destination

- i. Food & Drink (TripAdvisor)
- ii. Restaurants (Yelp)

## 8. Lodging

Accommodations in a destination

- i. Hotels (TripAdvisor)
- ii. Airbnb Listings (Airbnb)

Please note that this activity is limited to identifying and quantifying establishments that have been listed by TripAdvisor or Yelp and as a result may miss others, in SLO CAL or the competitive set, that have not yet been listed. However, the focus of this activity is not to create an exhaustive inventory of tourism products, rather it is to understand what visitors are saying about the destinations' products and what they see and use when making their travel plans. Identifying missing or hidden assets will be done via the Stakeholder Engagement activity.

# 5 // STAKEHOLDER ENGAGEMENT

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Whenever a destination undertakes a tourism strategy exercise it is critical to open the lines of communication with industry stakeholders to focus significant attention and engagement on the specific issues related to the destination, brand, tourism marketing vision, objectives, strategies, plans and performance.

In this regard, this phase of the project will entail a series of interviews and meetings with key stakeholders (tourism industry, government, community residents and Visit SLO CAL) to vision a forward looking San Luis Obispo County – taking into consideration all that has been learned to date in Phases 1-4.

Approximately one man-week of one-on-one and group sessions will be conducted.

The primary purpose of these discussions will be to identify participant opinions, aspirations and ideas for the future of the destination and tourism marketing in San Luis Obispo County, while also building an informal group of “champions” for the project that will be critical to the endorsement and implementation of the Destination Development Plan upon completion.

A Resonance consultant(s) will meet individually, in person and by telephone with stakeholders in individual and group sessions ranging from 45-75 minutes each to discuss:

1. The trends impacting the San Luis Obispo County tourism industry and the threats and opportunities they represent;
2. Current tourism activities and marketing efforts and their impact on San Luis Obispo County's economy, employment, tourism quality, environment and quality of life;
3. Growth and expansion opportunities for San Luis Obispo County's tourism industry with respect to market realities;
4. Hidden assets that may offer potential for growth;
5. Tourism industry actions and activities that can and do impact the local economy and social well-being; and
6. Issues and opportunities needed to inform and direct governance, management, funding, planning and development in a manner that supports tourism development and community goals and objectives.

During this stakeholder engagement activity, Resonance will also conduct specifically focused “community sessions” (2 sessions in each of 5 county locations) with 6-8 interested residents per session (approximately 2 hours each) to focus the discussion and stakeholder input on residents’ perspective and quality-of-life issues.

The results of these discussions will be recorded and summarized by Resonance into a SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats) to help identify and articulate industry and community issues and opportunities – along with the strategies and plans required – to guide the long-term planning of San Luis Obispo County as an important tourism destination.

To encourage an open and honest discussion, all conversations will be confidential; and the only attribution of comments would be to the collective “stakeholders”.

Stakeholders’ individual comments will be recorded and filtered based on the stakeholder’s knowledge, experience, involvement with tourism and quality-of-life issues in San Luis Obispo County, insight, awareness, specificity and frequency, and summarized into issue area findings. The process used to summarize the comments received and conclusions made by Resonance Consultancy will be based on:

1. How often the feedback/comment was received from stakeholders.
2. The expertise of the stakeholder regarding the tourism industry and community impact in San Luis Obispo County.

These interview sessions can also be extremely helpful for interested stakeholders to understand the implications of industry, business and quality-of-life issues and help create a sense of consultation, engagement and contribution to the process. Our experience is that the goodwill generated by these efforts far exceeds the time and expense necessary to carry them out.

Although we have suggested one man-week of stakeholder and resident engagement, we can easily adjust the scope of work included in this proposal to accommodate additional time to this effort if necessary and / or requested.

The delivery for this phase of the project will be a SWOT Analysis report of stakeholder issues and opportunities that should be carried forward to the Visit SLO CAL project Steering Committee for priority consideration in a workshop exercise.

## 6 // COMMUNITY SURVEY

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As a firm we are constantly surprised by the enormous interest of community residents in destination development plans. At the same time, we realize the important political need to listen to and engage with community residents, especially as it relates to prioritizing existing issues and potential opportunities proposed by the plans.

In Vancouver for example, more than 2,000 Vancouver residents and business leaders participated via an online survey – through which more than 11,000 comments and ideas were submitted. Although it is difficult to directly link this engagement to the success of the end result, it was clear at the end of the Vancouver project that there was little or no public resistance or criticism to the issues and opportunities contained in the final report.

As such, understanding the aspirations of the local community with respect to how San Luis Obispo County is perceived and positioned as a destination to live, work and play is a critical component of the process. In consultation with the Steering Committee, Resonance will develop an online survey to identify and gauge residents perceptions on a variety of key characteristics with respect to livability, culture, economy and sense of place. The survey will be promoted via email to the databases of a variety of civic organizations as introduced by the Steering Committee.

- Assess the quality and satisfaction with current services, accommodation and amenities throughout the County
- Identify hidden assets that may offer potential for increasing the resident quality-of-life and tourism growth
- Assess the relative attractiveness of different new amenities and improvements under consideration for San Luis Obispo County
- Inform project decisions for stakeholders and prioritize opportunities for the County
- Engage residents in the development phase to accelerate the approval and design process for permanent changes in the future

# 7 // SITUATIONAL ANALYSIS

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Upon completion of the Economic Impact Analysis, Consumer Research and Analysis, Destination Assessment, Stakeholder Engagement, and Community Survey, Resonance will prepare a Situational Analysis report that summarizes the current state of San Luis Obispo County’s tourism industry and destination strategy.

The Situational Analysis will document, discuss and summarize a customized list of issues and opportunities for tourism in San Luis Obispo County, key characteristics and motivators of current consumers and potential opportunities for the destination versus its competitive set. The outline for the Situational Analysis is anticipated to include:

## 1. Overview & Objectives

- An overview of the project initiative, concept and objectives

## 2. Trends & Target Audiences

- Overview of tourism economic impact research and forecasts
- Synopsis of consumer research
- A summary of relevant tourism trends that may influence target audiences

## 3. Key Issues & Opportunities

- Summary of feedback from strategic conversations with key stakeholders and community survey

## 4. Competitive Analysis

- Differentiators of SLO CAL versus competitive set

## 4. Conceptual Framework

- Emergent findings and potential directions with respect to a tourism strategy for the destination

The Situational Analysis is an important milestone in the project that provides a snapshot of “where we are today” with insights collected from stakeholders and consumers with respect to motivating characteristics and differentiators of the region that could shape the tourism strategy and implementation for the destination.

# 8 // VISIONING WORKSHOPS

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Our team has led community visioning and strategy workshops in many countries and in multiple languages. We get sparks by rubbing brains together: our people and your people together, because inspiration comes from places we don't know by heart or by habit. We factor in the research we've done, and use all the combined energy to help stakeholders create rich, detailed visions of what the future could be like for their destination or community.

With the Situational Analysis in hand, Resonance will facilitate a series of 5-6 half day workshops with the Steering Committee and select stakeholders spread throughout the County (regionally or selected municipalities). This process puts your community under a strategic microscope to identify where San Luis Obispo County is competitive, where it's deficient and what are the opportunities to differentiate the region from that of its competitors. We then identify ideas and opportunities as to how that positioning can inform the region's travel and tourism development strategy.

Our approach to strategic planning and workshop facilitation is differentiated by three core beliefs:

1. Engaging a diverse range of participants in the process.
2. Shifting the dialogue from focusing on "What is" to "What could be" through the use of futures techniques and methodologies.
3. Utilizing graphic facilitation methods and imagery in strategic exercises to illustrate ideas that are more robust than can be expressed by words alone.

Recognized at the World Sense of Place Summit as the Place Branding Thought Leader of the Year in 2013, Resonance Consultancy President Chris Fair will lead the workshops to help uncover, articulate and define your destination's DNA and sense of place in a manner that will resonate with audiences both at home and abroad by discussing the benchmarking of your destination against its competitors, analyzing current consumer research, forecasting future trends and engaging your team with story-seeking exercises and questions that help you get to the heart of the matter. What makes your region different? What does it stand for? What unique stories can it tell? What are its aspirations for the future?

# 9 // DRAFT RECOMMENDATIONS

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Following the workshops, Resonance will summarize the input and ideas collected in the workshops with our emergent findings, and draft recommendations with respect to: placemaking, product, programming and protocol to enhance San Luis Obispo County as a destination and grow its travel and tourism industry. These recommendations may be general in nature or specific to a particular circumstance or situation, and illustrated with best practice examples from other leading destinations where possible and applicable.

- Place: This speaks to the integration of travel and tourism development with the vision and planning of a region. The Place lens incorporates and considers the development of neighborhoods, parks, trails, public spaces and public transportation as key magnets and differentiating characteristics of a destination.
- Product: This is the most obvious and considers and addresses the development of the hardware of a destination such as its airport, convention center, hotels, and attractions.
- Programming: This considers and addresses the development of the software of a destination such as its festivals, events, and supporting services like wayfinding and visitor information.
- Protocol: This considers both the organizational structure and funding mechanisms for the development, marketing and management of travel and tourism in a region, and the policy linkages between organizations within the region and outside of it at a state and national level.

When examining key strategic travel and tourism development opportunities, we will anticipate how they would be developed and operationalized, where they should be located and consider the best approaches to financing and funding each of them. An understanding of the ongoing operational viability of any proposed developments is essential.

As such, the consulting team brings to the process a strong understanding of international and national travel and tourism industry development, an intimate appreciation of the dynamic and direction of the national industry, and an understanding of the unique issues confronting local travel and tourism efforts, as well as the needs and expectations of key stakeholders.

The process begins with the list of opportunities based on the comprehensive analysis of existing and potential travel and tourism trends, market analysis and situational analysis. Many of these potential opportunities could address gaps in the destination's product base, while others could seek to enhance the existing infrastructure. In some cases the development opportunities may already be underway.

This list is then narrowed by matching product opportunities to marketplace requirements and detailing the prioritization of each opportunity.

### **Prioritization**

Building on stakeholder input, examining which potential opportunities identified by the process have the greatest return on investment (financially and otherwise) is expected to be a key goal of this project.

In addition to detailing each of the workshop recommendations, Resonance will produce a priority ranking for each of the recommendations detailing its fit with the following return on investment criteria:

- Destination Development Plan goals
- Cost (order of magnitude) to San Luis Obispo County and industry stakeholders
- Visibility among stakeholders and residents of San Luis Obispo County
- Economic impact (order of magnitude) of attracting new visitors to San Luis Obispo County
- Timing to implement the opportunity and/or realize the benefits (near term, medium and long-term)

These criteria and priority ranking will allow the project team, industry stakeholders and community residents to put each recommendation into perspective as it moves forward in the process.

# 9 // OPEN HOUSE / ONLINE FORUM

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Unfortunately, there is no “special sauce” or methodology associated with building consensus on a Destination Development Plan, its costs / benefit, or its potential partnerships.

Our experience has shown, that bridging gaps in policy, perspective or position between project partners, other stakeholders and community residents involves patience and creativity.

For this reason, following the workshops and draft recommendations, Resonance will conduct a community-wide Open House and Online Forum that presents the draft recommendations and seeks stakeholder and resident feedback.

The draft recommendations will be detailed with real life examples and best case studies of how other destinations have implemented similar efforts. Also featured will be the prioritization of each recommendation, illustrating the broad ranging return on investment.

The Open House and Online Forum will be open for 3-days and two-weeks respectively in conjunction with an online survey, to answer questions and collect input from San Luis Obispo County stakeholders and residents with respect to preferences and priorities in order to prepare the final report.

This activity will lead to a final list of tourism strategies agreed with the Steering Committee that we believe will best resonate with the identified future market segments and that are also aligned with the interests and aspirations of stakeholders and residents to produce “market forecast driven” recommendations.

# 10 // FINAL REPORT & DELIVERY

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Following the results of the Open House / Online Forum and feedback from the Steering Committee, Resonance will prepare a draft Destination Development Plan that consists of:

- Summary of current market and profiles of anticipated/desired visitors of the future
- Summary of key competitive advantages and gaps versus competitors
- Recommended positioning and vision for San Luis Obispo County to grow market share
- Summary of recommended development initiatives to grow San Luis Obispo County's travel and tourism industry, including goals, strategies and tasks, as well as planning level costs, funding options, location preferences and consensus-based roles and responsibilities to ensure the plans goals and ambitions are implemented
- Recommendations for how the county and its partners including entities such as the Visit SLO CAL will use the plan to define, monitor and assess progress, as well as detail policy and procedures to ensure the best use of county funding

The project needs to ensure a strong product-market match, and as such we will identify what existing resources offer strong travel and tourism development potential and what resources can be further developed to enhance the industry in the destination, all in the context of meeting marketplace needs.

Although the exact content of the Destination Development Plan may evolve during the course of the project, we suggest the outline of the Destination Development Plan as follows:

## **Outline of Destination Development Plan**

1. Introduction
2. Executive Summary
3. Overview of Process
  - a. Guiding principles obtained from public outreach effort
4. Vision, Mission, Objectives
5. Current Situation Analysis
  - a. Tourism Asset Inventory
    - i. Local Assets
    - ii. Regional Assets
  - b. Current partners and their responsibilities and resources
  - c. Tourism trends



- d. Visitor Characteristics
  - e. Organizational assets
- 6. Strengths/Weaknesses/Opportunities/Threats Analysis
- 7. Strategies and Implementation Approach
- 8. Recommended Action Plan (prioritize with Immediate, Medium Term and Long Term Needs and performance metrics)
  - a. Operating Plan: Asset Inventory, Marketing, Infrastructure Needs, Land Use to include zoning issues, organizational impacts
  - b. County Financial/Investment Plan
  - c. Partner Action Plan

# PROJECT FEES

The financial proposal for the San Luis Obispo County Destination Development Plan follows below and on the following pages.

Based on our understanding of Visit SLO CAL’s goals and objectives for the Destination Development Plan and our experience in doing similar work in other destinations, we have set the Professional Fees at US\$210,000 plus estimated out-of-pocket expenses including travel at US\$17,650. The total project budget is US\$227,650.

We are more than happy to discuss any and all adjustments to the Scope of Work or the activities that we have proposed to fulfill Visit SLO CAL’s project objectives.

<i>Professionals</i>	<i>Hourly Rate</i>
Chris Fair, President	\$250
Richard Cutting-Miller, Executive Vice-President	\$250
Sara Peary, Vice-President Strategy	\$200
Staff	\$150

# BUDGET

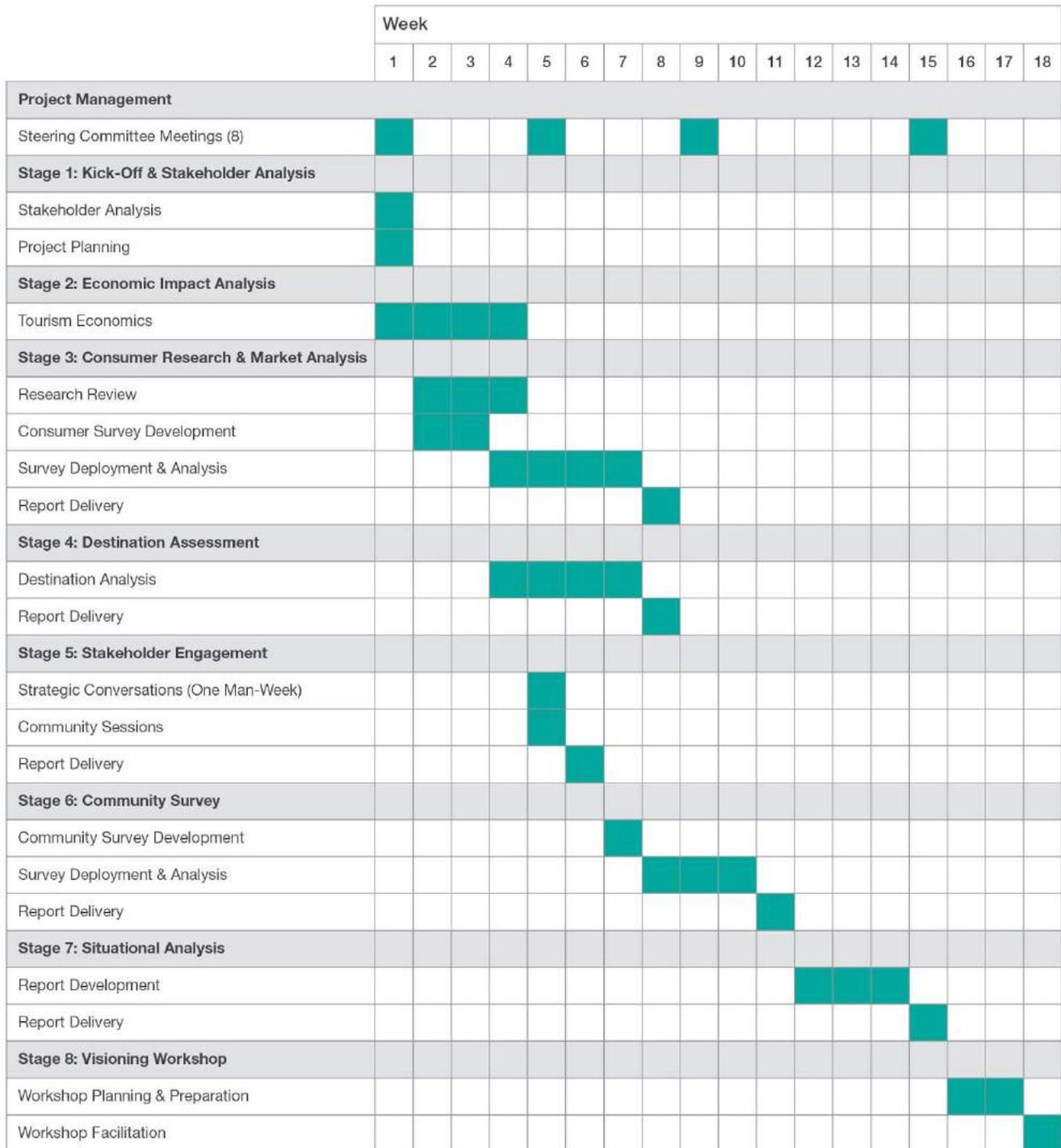
	C. Fair		R. Cutting-Miller		S. Fahy		T.Hasid		Staff		Total Fees
	Hrs	\$	Hrs	\$	Hrs	\$	Hrs	\$	Hrs	\$	\$
<b>Project Management</b>											
Steering Committee Meetings (8)	16	4,000	16	4,000	16	3,200	16	2,400	-	-	11,200
<b>Stage 1: Kick-Off &amp; Stakeholder Analysis</b>											
Stakeholder Analysis	4	1,000	4	1,000	4	800	-	-	-	-	2,800
Project Planning	4	1,000	4	1,000	4	800	-	-	-	-	2,800
<b>Stage 2: Economic Impact Analysis</b>											
Tourism Economics	-	-	-	-	-	-	-	-	-	-	20,000
<b>Stage 3: Consumer Research &amp; Market Analysis</b>											
Research Review	-	-	40	10,000	-	-	-	-	-	-	10,000
Consumer Survey Development	2	500	16	4,000	-	-	-	-	-	-	4,500
Survey Deployment & Analysis	2	500	16	4,000	-	-	-	-	-	-	4,500
Report Delivery	4	1,000	24	6,000	-	-	-	-	12	1,500	8,500
<b>Stage 4: Destination Assessment</b>											
Destination Analysis	4	1,000	16	4,000	-	-	40	6,000	-	-	5,000
Report Delivery	4	1,000	8	2,000	-	-	-	-	-	-	3,000
<b>Stage 5: Stakeholder Engagement</b>											
Strategic Conversations (One Man-Week)	-	-	-	-	40	8,000	-	-	-	-	8,000
Community Sessions	-	-	-	-	20	4,000	-	-	-	-	4,000
Report Delivery	2	500	2	500	16	3,200	-	-	-	-	4,200
<b>Stage 6: Community Survey</b>											
Community Survey Development	2	500	16	4,000	-	-	-	-	-	-	4,500
Survey Deployment & Analysis	-	-	16	4,000	-	-	-	-	-	-	4,000
Report Delivery	2	500	8	2,000	-	-	-	-	-	-	2,500
<b>Stage 7: Situational Analysis</b>											
Report Development	4	1,000	24	6,000	12	2,400	-	-	24	3,000	12,400
Report Delivery	8	2,000	8	2,000	8	1,600	-	-	-	-	5,600



# BUDGET

	C. Fair		R. Cutting-Miller		S. Fahy		T.Hasid		Staff		Total Fees
	Hrs	\$	Hrs	\$	Hrs	\$	Hrs	\$	Hrs	\$	\$
<b>Stage 8: Visioning Workshop</b>											
Workshop Planning & Preparation	8	2,000	8	2,000	4	800	-	-	16	2,000	6,800
Workshop Facilitation	24	6,000	24	6,000	24	4,800	-	-	-	-	16,800
<b>Stage 9: Draft Recommendations</b>											
Recommendations Development	4	1,000	40	10,000	16	3,200	-	-	24	3,000	17,200
Recommendation Presentation & Review	8	2,000	8	2,000	8	1,600	-	-	-	-	5,600
Recommendation Revisions	4	1,000	8	2,000	4	800	-	-	4	500	4,300
<b>Stage 10: Open House / Online Forum</b>											
OH / OF Preparation and Survey Development	4	1,000	8	2,000	8	1,600	-	-	16	2,000	6,600
OH Hosting	16	4,000	16	4,000	16	3,200	-	-	-	-	11,200
Survey Results and Analysis	4	1,000	16	4,000	4	800	-	-	-	-	5,800
<b>Stage 11: Final Report &amp; Delivery</b>											
Report Development	8	2,000	24	6,000	8	1,600	-	-	24	3,000	12,600
Report Delivery	8	2,000	8	2,000	8	1,600	-	-	-	-	5,600
<b>Total Fees</b>	<b>146</b>	<b>36,500</b>	<b>378</b>	<b>94,500</b>	<b>220</b>	<b>44,000</b>	<b>56</b>	<b>8,400</b>	<b>120</b>	<b>15,000</b>	<b>210,000</b>

# TIMELINE



# TIMELINE

	Week																	
	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
<b>Project Management</b>																		
Steering Committee Meetings (8)					█									█				█
<b>Stage 9: Draft Recommendations</b>																		
Recommendations Development	█	█	█															
Recommendation Presentation & Review				█	█													
Recommendation Revisions						█	█											
<b>Stage 10: Open House / Online Forum</b>																		
OH / OF Preparation and Survey Development								█	█									
OH Hosting										█	█	█						
Survey Results and Analysis													█	█				
<b>Stage 11: Final Report &amp; Delivery</b>																		
Report Development																█	█	█
Report Delivery																		█



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