



HUMBOLDT COUNTY VISITORS BUREAU

2021 – 2024 Marketing Strategy

EXECUTIVE OVERVIEW

Investing in the Future of Tourism in the Post COVID-19 Economy

In the Humboldt County 2018-2023 Comprehensive Economic Development Strategy (CEDS), tourism was recognized as an *“essential part of the region’s basic economic foundation, providing significant (if lower wage) employment opportunities and importing significant revenue. It also serves as an important workforce training ground.”*

“Significant revenue” is exactly right. Over the past 9 years, direct travel-related spending in Humboldt County has increased every year, growing from \$377.1 M in 2010 to \$483.7 M in 2019¹. This spending netted the County \$41.8M in tax revenue.

County investment in tourism has not increased in many years. The Bureau receives on average \$200K per year, 0.478% of tax revenue. Humboldt is, by other rural county standards, woefully underfunded.

The Bureau’s marketing efforts have significantly increased resulting in the County receiving national and international media attention and expanded global awareness through traditional media, digital media, and PR platforms, and non-traditional media through influencers.

Tourism spending and the tax revenue generated impacts all Humboldt County residents. Not just hotels and accommodations, but many other locally owned businesses benefit from the activity and taxes that visitors generate. Humboldt’s “Food Service” industry, for example, is the County’s largest stakeholder earning \$34M+ more than “Accommodations” (see pg. 4) in 2019 alone. This accounts for a 16.5% increase, with local “Retail Sales” showing an impressive 15.3% increase as well.

No longer is tourism a goal in itself. The reality is tourism contributes to building better destinations and experiences for locals and visitors alike. Taking a broad view beyond the ‘heads in beds’ model, destination promotion directly benefits the whole community.

The new role of destination marketing and management aligns tourism, community and economic development. It is a shift from promoting communities to building communities.

Quality of life for residents = Quality of place for visitors.

¹ industry.visitcalifornia.com/research/economic-impact?sort=county®ion=Humboldt

Despite the acknowledgement of the importance of tourism by the CEDS and the essential income generated, County investment in tourism has not increased.² What has increased is a significant investment from neighboring Counties who have not only recognized the importance of tourism, but have backed-up this significant revenue generator with investments capable of moving the needle.

In comparison to other Northern California DMO's, Humboldt's marketing budget is significantly smaller, yet brings-in comparable tax revenues. (*see page 4*)

Prior to February 2020, the Bureau was having challenges as an organization but, with consistent marketing, Humboldt County was doing well as a visitor destination. Then came COVID-19. The messaging and strategy we now choose to disseminate will influence both resident sentiment and visitor confidence, and ultimately have a major impact on the economic recovery of the County.

Post COVID, tourism will be a top income generator for rural Northern California and for Humboldt County which attracts people wishing to escape to a destination with no crowds, and unlimited outdoor experiences.

The key to the Bureau's success over the next five years is increased investment.

Realistically, Humboldt County can't be competitive with the fragmented and underfunded system seen over the past few years. Increased funding will allow the Bureau to revitalize and grow tourism while simultaneously safeguarding the health of all community members AND future visitors.

Working with the numerous Chambers and Agencies currently promoting different regions and assets of Humboldt County (see appendix B), the Bureau will begin to win the hearts of tomorrow's tourists by developing content and packaging experiences that speak specifically to target markets.

In addition to producing customized, inspirational and professional content, the Bureau will focus on integrating the natural assets with towns/communities to highlight unique regional culture and opportunities, focused initially on state and National audiences. Working together with stakeholders, the goal is to create a world-class marketing engine and rebuild the economy.

As well as HCVB's role to inform, inspire and educate visitors and adventure seekers, it has a key responsibility to promote *and* protect our environmental, social and cultural characteristics. For the recovery and future growth of tourism post COVID-19, a more balanced, resilient and sustainable funding model is required. For HCVB to help lead the recovery, it is imperative that a substantial increase in County funding is forthcoming.

The full 2021-2024 Marketing Strategy document is a roadmap to the successful, unified marketing of Humboldt County that will be immediately implemented when funding is secured.

² County funding allocation for the HCVB is based upon an equation that reflects a percentage of the annual TOT. Current annual funds are an estimated \$200,000.

Northern California Tourism Market

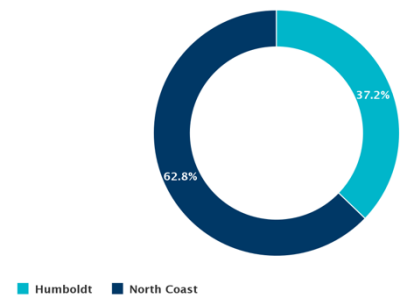
To keep-up with an increasingly competitive global/national market, the state of California has made significant marketing investments in travel, starting with 1998’s restructuring of the California Travel and Tourism Commission, now called Visit California. The state has realized an exceptional return on this investment, with direct travel spending at \$144.9B in 2019 and travel-generated employment increased at an average rate of 3.5% per annum since 2010. Humboldt has shared this growth (see below), thanks in part to Visit California’s efforts, and its collaboration with the HCVB.

By the Numbers

1 | 2019 REVENUE

SONOMA - \$2.2B
SHASTA - \$544.7M
MENDOCINO - \$484.0M
HUMBOLDT - \$483.7M

HUMBOLDT SHARE OF TOTAL REGION SPENDING



According to 2019 statistics shared by Visit California³, Humboldt’s modest 6K employees working in travel-related employment helped earn over **\$483.7M in spending in 2019**. This accounted for an impressive 37.2% of total spending in the “North Coast” which includes of Del Norte, Mendocino, Lake, and Sonoma Counties.

HUMBOLDT 2019

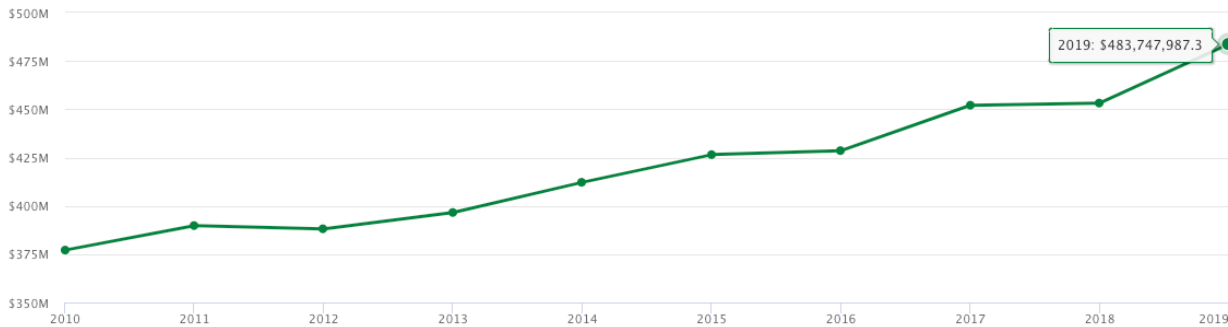
TRAVEL-RELATED SPENDING	STATE & LOCAL TAX REVENUE	EMPLOYMENT
\$483.7M (up 6.7%)	\$41.8 M (up 6.9%)	6.0 K (up 9%)

To help put this spending into perspective and identify Humboldt’s key stakeholder industries, travel and tourism spending is categorized and measured by the following seven segments:

- 1) **Food Service** = \$131,205,535 (16.5% increase)
- 2) **Accommodations** = \$96,874,896 (1.8% increase)
- 3) **Local Trans and Gas** = \$67,687,779 (6.2% increase)
- 4) **Arts, Ent, Recreation** = \$59,612,014 (4.1% increase)
- 5) **Retail Sales** = \$52,453,744 (15.3% increase)
- 6) **Food Stores** = \$30,331,997 (6.5% increase)
- 7) **Visitor Air Trans** = \$8,286,860 (18.9 increase)

³ Dean Runyan & Associates, Inc.

HUMBOLDT HISTORY OF TRAVEL SPENDING IN CALIFORNIA



2 | Competitive Analysis: Northern Counties

Here’s a snapshot of surrounding counties budgets along with a summary of yearly travel-related spending.

Funding Sources, Budgets and Marketing Spending Comparison: 2019-2020

Humboldt: Actual \$390,900

Marketing Investment: **\$180,000 (46%)**

60% County: 27% HLA’s: 13% membership, advertising & admin fees

Mendocino’s Budget: \$1,484,433

Direct Marketing Investment: **\$950,621 (64%)**

66% MCTC BID Assessment: 33.5% County Match: 0.5% other (event ads)

Shasta Cascade’s Budget: \$1,495,570

Marketing Investment: **\$1,150,000 (77%)**

98% City of Redding TOT & TBID Assessment (Redding lodging): 2% Membership.

2020-2021-40% Redding, 60% County TOT.

Sonoma’s Budget: \$2.4M

Marketing Investment: **\$2,100,000**

66% BIA assessment: 33% Board Seats for Sale, 1% City funding. 100% City funding goes to marketing programs. BIA (Business Improvement Area) established in 2004. All unincorporated areas and cities. 2% assessment on all lodging businesses grossing more than \$350,000 annually. Board Seats for Sale-cost figured annually on DMO revenues.

2019 Travel-Related Spending: Competitive Counties

We can see how each county’s funding totals (and funding model) compare the HCVB, and how this ultimately translates to spending by travelers (below).

**2019 Tourism Spending Impact
County Comparison**

	\$ Total	Percentage Increase over 2018	State & Local Tax Revenue	Industry-related Employment	% Total Regional spending	<i>Travel Spending by Industry Segment</i>				
						Food Service	Lodging	Arts, Entertainment, Recreation	Retail Sales	Local Trans. & Gas
Humboldt	483.7 M	6.7	41.8 M	6 K	37.2	131.2 M	96.8 M	59.6 M	46.1 M	67.6 M
Mendocino	484.4 M	0.04	46.2 M	6.4 K	37.3	138.9 M	134.2 M	62.8 M	53.1 M	53.3.M
Siskiyou	206 M	2	16.4 M	1.8 K	16.9	59.5 M	51.1 M	27.9 M	24.3 M	24.1 M
Shasta (Cascade)	544.7 M	4.8	44.1 M	5.1 K	44.6	138 M	123.1 M	62.3 M	71.8 M	78.9 M
Trinity	60.7 M	1.3	3.7 M	712	5.1	16.3M	13.1 M	8.01 M	6.8 M	8.7 M
Lake	180.7 M	8.2	12.8 M	1.8 K	13.9	51.4 M	32.6 M	25 M	23.2 M	22.2 M
Del Norte	150.5 M	11	12.6 M	1.6 K	12%	41.6 M	33.3 M	19.7 M	16.8 M	19.7 M
Sonoma	2.2 B		203.5 M	22.3 K		580.1 M	504.7 M	354.4 M	348.2 M	183.6 M



Humboldt County Visitors Bureau

2021-2024 MARKETING STRATEGY

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1 | HCVB Pre-COVID-19

Work on developing this marketing plan was initiated in February with research into travel and traveler trends and demographics, data about visitors to the region and to Humboldt County. By the time the research was completed and the plan in its formative phase, the gravity of the COVID-19 pandemic was apparent as was its growing impact on state, national and international tourism.

Original predictions estimated that the pandemic would be under control within three months. Almost one year later, and with no end in sight, International travel and tourism remains at a standstill while the airline, cruise and theme park industries are devastated. The long-term economic, physical and mental health impacts are truly unknown.

In March, states and counties mandated travel restrictions. However, by late-May, road trips to rural areas of natural beauty saw an incredible escalation especially by people wanting to escape from metropolitan areas and crowded cities. Throughout Humboldt County, hotels and accommodations (including RV parks and campgrounds), reported consistent occupancy rates at maximum capacity allowed by County regulations.

Prior to March 2020, and based on tourism activity from previous years, we projected direct travel spending revenue to exceed \$483M. An analysis of the current visitor spending habits indicates that, countywide, the Arts & Entertainment, Retail Sales, and food service industry sectors will experience the greatest negative economic impact. However, the Transit Occupancy Tax (TOT) while showing a decline in the second quarter (April) has seen a significant bounce back.

Both consumer (visitor) and resident confidence change weekly, along with the ebb and flow of pandemic statistics. Now more than ever, it is critical that strong and impactful marketing is undertaken in a consistent and focused manner. Together we need to ensure that tourism will continue as a sustainable contributor to the economy, benefiting County residents and providing visitors with exceptional and memorable experiences.

2 | The Changing Face of Tourism

Over the past five years, Travelers' spending habits and intentions have changed, expectations in hospitality have shifted. In response, marketing techniques have become more refined, and the old-world funding model derived from "heads in beds" is no longer relevant. To better serve our communities, future travelers, and the full spectrum of industries contributing to our economy, the Humboldt County Visitors Bureau (HCVB) is transitioning from the traditional "PR firm" model of the past, to a modern, digitally-savvy Destination Marketing & Management Organization (DMMO).

That said, the Bureau's role is to provide big picture strategic vision to ensure that all regions throughout Humboldt County thrive in today's increasingly competitive tourism landscape. Earning national media coverage for the entire region has always been an essential service and will continue to be important, but the Bureau's true strength lies as facilitator and expeditor. While cities and small rural communities market their unique experiences, and private industry continue to market their products, HCVB's role as County-wide destination manager will remain essential. Unlike the communities developing their own brands, HCVB's responsibility is to give the smaller stakeholder communities leverage against competing Counties by representing them in the national and international tourism market.

In order to support our stakeholders, generate economic activity for county residents through tourism, and inspire our visitors, Humboldt County Visitors Bureau will:

- Consistently promote and market the entire county and its assets.
- Create, develop, and manage brand awareness for the county outside of the area.
- Connect people and organizations to opportunities.
- Provide information to in-county partners, and tourism resources to the industry.

Created for "non marketers", this research-based roadmap guides the needed investments to help transition the HCVB to a modern DMMO and complete marketing efforts through 2024. Although it offers new focus areas for improvement and explains operational changes necessary for HCVB to succeed, it doesn't go deep "in the weeds" regarding quarterly marketing campaigns that will be managed by the Bureau's growing team over time.

3 | HCVB Membership & Funding

The original HCCVB was established as a membership organization. However, over the decades, and more recently with its relationships with the HLA and City of Eureka, membership became a source of discontent due to the lack of written policies, guidelines and clear benefits. HCVB received negative feedback due to the many categories of businesses excluded or not represented. To better promote and serve the whole county, discussions to cease being a membership organization were held.

At the July 29, 2020 HCVB Board meeting, a motion to end membership was voted upon and adopted.

Established in 1978, the Humboldt County Convention & Visitors Bureau (HCCVB)⁴ was designated the marketing organization for the county received funding from the County and the City of Eureka. The County designated 18% of the annual TOT to support the 'gateway' communities of Orick, Willow Creek and Garberville. This was later extended to include Arcata and Southern Humboldt Visitors & Convention Bureau. The Bureau received 60% of the 18%, an average of \$190,000 per annum. The City

⁴ The name was changed to the Eureka-Humboldt County Visitors Bureau in 2000, then Humboldt County Visitors Bureau (HCVB) in 2019 to reflect the funding changes.

of Eureka had a 5-year contract with HCCVB for 1/3 of bed tax, with a 12-month window for cancellation. The contract with the City of Eureka was terminated in June 2019, reducing the Bureau's annual budget by 53% (\$370,000).

In 2012, the Humboldt Lodging Alliance (HLA) was established as a TBID to invest in County marketing initiatives to attract visitors, increase occupancy, and generated increased income. The HLA funds were dispersed throughout the County to incorporated cities and rural regions (north, south and east) and each controlled and designated the funds as they saw fit. 60% was used for marketing the county, resulting in the "Follow the Magic" campaign. The remaining 10% went to miscellaneous and operations.

In 2017, the HLA flipped their funding formula so cities and unincorporated areas received 60% of the TBID, with each being responsible for developing its own creative and content, managing events and engaging in digital marketing efforts as standalone, marketable destinations. However, many areas were unable to adequately fulfill consistent and 'unique' messaging.

Subsequently, Humboldt's cities and regions have been in competition, resulting in multiple similar 'campaigns' and websites, and a lack of consistent, meaningful messaging and content. The Bureau no longer has the financial capacity to support these 'brands' and multiple messages.

A new Bureau funding model is the foremost issue and challenge. This is particularly true after the projected negative impact of COVID-19 in Q1/Q2 2020 (primarily March/April). The Bureau believes that now is the time to establish collaborative partnerships to prudently invest funds in a focused strategy to market ALL county assets and realize the best possible marketing and economic results for all the county stakeholders.

For Humboldt County to continue being a strong, competitive player in Northern California tourism and grow the \$483.7+M in tourist annual spending, it is imperative that the Bureau have a strong funding stream and creative team in place.

4 | Travel Trends

Today, travelers from all generations have overwhelmingly traded their cruise ships and pina colodas for more meaningful travel experiences. Traditional top activities for domestic travelers (shopping = 21%, beach 18%, fine dining = 16%) are finally giving way to growing trends that better align with Humboldt County's strengths. Younger generations are increasingly interested in outdoor activities, rural sightseeing, hiking/backpacking, and visiting state parks.

Travelers of all demographics have been taking more, although shorter excursions. Road trips are often preferred over flying due to their lower carbon footprint, and properties catering to various price points have been marketing their green-friendly features to appeal to a growing interest in sustainable travel.

This is especially true in a post COVID-19 market. Not only will air travel increase tourists' risk of exposure to COVID-19 and future unknown outbreaks, so will gathering in high population areas.

The HCVB will actively work with all stakeholders to ensure their marketing needs and content resonate with tourists by catering to growing trends that highlight Humboldt's strengths including:

Wellness Travel: One of the quickest growing segments of tourism, Wellness Tourism accounts for over \$242 BN annually in North America and is expected to continue to grow 7.5% yearly to reach \$919 BN globally in 2022. Yoga excursions, Wellness travelers are among the highest spending group and now represent 17% of all travel-related revenue; \$1 for every \$6 spent. This once elite market is now mainstream, with international wellness tourists showing 53% more spending (\$1,528 per trip) compared to others.

Bleisure Trips: (Business+Leisure) Nearly half (48%) of employed Americans consider themselves workaholics, and they're increasingly squeezing-in mini-vacations to stay sane and productive at work. According to the State of Business Travel survey, 90% of Millennials have enjoyed bleisure travel in the past year. Although Millennials are more likely to blur the lines between business and leisure travel, the practice of adding days/weeks to business trips has been consistently growing across generations. A hefty 80% of Baby Boomers and 81% of X'ers also report adding extra travel their work trips. As remote working becomes standard in many industries, some workers (aka "digital nomads") never stop traveling. Travel is independent from work altogether, and "home" can be anywhere scenic with strong Wi-Fi.

'Second City' Travelers: Rejecting "bucket list" locations like Yosemite due to over-tourism, many travelers are instead choosing authentic experiences in more remote locations. Some choose less traveled locations in search of solitude, while others seek to support personal causes like wildlife conservation or environmental improvement. 51% of global travelers interviewed by Booking.com reported they would swap their original destination location for a similar one once it would leave less of an impact. This increases to 56% for those aged 18-25. One thing most Second City travelers have in common is their interest in leaving visited destinations in a better place than when they arrived.

Female-Only Travel: 80% of all travel decisions are made by women, so it isn't a surprise that many are traveling "solo" and with groups of other women. 2020's market for this trend accounted for a projected \$125B internationally which has fueled a 230% increase in travel companies specializing in woman-only travel. Particularly interesting is the fact that half (54%) of all international solo travelers are women earning over \$250,000. Coronavirus will no doubt decimate these pre-COVID-19 projections, but the trend will remain as the economy begins to reopen.

5 | HCVB's Strategic Overview – Past and Present

The core of HCVB's marketing strategy in the past concentrated on identifying top local attractions and developing content for each. This content would be posted to VisitRedwoods.com, printed on brochures, and pitched to media outlets around the world. Although there have been many notable achievements when it comes to earned press like Lonely Planet's "Best in the US 2018" and a recent industry award for "Operation Bigfoot", these successes largely rested on the talents of an individual team member and the marketing committee's willingness to try new, untested approaches.

What's been lacking in HCVB's past marketing that we're actively working to remedy:

- (a) target marketing to ensure the organization's limited resources are focused on communicating to those
 - i. most likely to visit Humboldt based on timely information, and
 - ii. who spend more on average per trip (based on data)
- (b) a marketing plan with specific measurable goals,
- (c) an organized process with a quarterly marketing calendar that the team can follow to ensure every region is included through scheduled campaigns

6 | HCVB's Target Markets – 2020 to 2023

HCVB's target markets are based on recent trends, Humboldt County's unique strengths in the market, and consumer data. The travel industry will need to consider consumer psychology as COVID-19 continues to influence travel trends in coming years. We expect domestic travelers to heavily favor road trips over flying for years to come, and our primary targets listed below have already shown their preferences for nature over nightlife.

Humboldt's Primary Targets

Millennial Parents: Those aged 21-37 are socially conscious, take more trips than any other generation (average 3 trips per year), and love nature. They were worth an estimated \$200B+ in 2018 and unlike other age-groups, they actively save for yearly vacations. This domestic traveler is 9.5 million strong and growing.

- Why are they traveling?
 - o They choose locations for multiple reasons: 55% say relaxation, 50% visiting family, 45% are looking for recreational family travel, 34% a romantic getaway
- Why is this a HCVB focus?
 - o 79% of Millennial travel is domestic.

- Humboldt County is 4.5 hours to millions of Millennial parents by car, from San Francisco and Sacramento, to Redding and Southern Oregon
- They spend a whopping \$5K+ on summer vacations on average
- Millennial parents place a higher value on locations with natural beauty (compared to luxury and/or shopping) and accessibility. Short excursions, access to bathrooms, no fuss meals are all appreciated by parents
- Adopting this target helps “float all boats” economically, as it enjoys short guided tours, relaxed atmosphere dining, and all forms of hotel accommodations
- They’re young (compared to their much older counterparts, Boomers+), so there’s a far greater chance for repeat travel

Unmarried Millennials (26-35) and Unmarried Gen-Xers (36-49): Those falling within this age group are the core consumers interested in growing travel trends “Wellness” (spiritual, outdoor adventure, health), “Bleisure”, and “Intention Travel”. We see some crossover in values and between this 29-49 group and the previously discussed Millennial Parents. This is a great benefit as we can reach multiple groups through single campaigns when possible.

- Why are they traveling?
 - They’re focused on fitness and put higher value in the outdoors
 - They look for new locations to experience their favorite sports and outdoor activities: kayaking, rafting, mountain biking, yoga, hiking, hunting, fishing
 - They seek “environmentally friendly” destinations with activities to match
- Why is this a HCVB focus?
 - Humboldt County’s forests embody all things appreciated by this target group: amazing forests, clean rivers and streams, untouched beaches, clean air, and wildlife
 - Locals don’t typically acknowledge this until leaving the area, but Humboldt’s larger towns/cities lack city traffic, noise, and pollution seen throughout the state and country
 - Despite the various town personas found throughout Humboldt County, all cater to “yoga culture” in their own unique ways
 - The “Unmarried” demographic appreciates the trip as much as the destination, and the trek to Humboldt County is epic from all directions
 - This group seeks “authenticity” and Humboldt County’s down-to-earth sensibilities are very attractive to those put off by California’s sometimes pretentious areas found in Wine Country and tech centers in the Bay Area
 - Today’s unmarried traveler is tomorrow’s potential candidate for destination weddings

Women Travelers: Whether solo or in groups, women travelers control the global wallet in this market and should be a focus for anyone in the travel industry. The average “adventure traveler” is a 47-year-old woman, not a young male.

- Why are they traveling?
 - 87% of women say they go for the beautiful scenery (72% men)

- A “rite of passage” for younger women travelers
- X’er and Boomer women solo travelers are often divorced, or widowed
- Why is this a HCVB focus?
 - 67M global women travelers with a market exceeding \$19T+ annually
 - 32M single American women traveled at least once within the year
 - Three in 10 single women travelers took five or more trips in the same year
 - 24% of American women have taken a girlfriend getaway within the past 3 years
 - 39% of American women plan on taking a girlfriend getaway within the next year

Humboldt’s Secondary Targets

Boomers: Although listed as a secondary target, the 55-75 year-old Boomer market is simply too large to leave out of any marketing plan. They represent a substantial portion of the overall travel industry, but they aren’t necessarily interested (as a whole) in what Humboldt County has to offer. 87% prefer aircraft as their preferred method of travel (not Humboldt’s strength due to limited connections), and only 29% report as being interested in the Western United States. They lean towards known brands for accommodations and value “bucket list” locations, choosing European locations (Paris) for culture and warm locations (Florida, Hawaii) for relaxation.

In short, Humboldt isn’t an obvious “love match” for the majority of Boomers. When they come, it tends to be for the scenery and our moderate climate. Humboldt has also had some success wooing older travelers to music festivals (Redwood Coast Music Festival, Bigfoot Daze), food festivals (Beer and Oyster), the Marble Festival, the world-renown 3-day Kinetic Sculpture Race, and the Ferndale Classic Car Concourse. On the other hand, attendance at these events has grown younger in recent years, and it remains to be seen how COVID-19 will continue to disrupt future events. Those running boomer-centric events and businesses like branded hotels will continue to do well, as there are very few options in the area to satisfy the niche.

That said, it takes a multi-channel marketing strategy to realize our true potential and ensure future growth, which goes beyond advertising to a dwindling boomer market.

7 | HCVB’s Marketing Strategy

Despite the remote location and modest infrastructure, Humboldt County is well-positioned to appeal to the next generation tourist. Our relatively young target markets seek unspoiled nature, health-minded communities, local organic produce and refreshments, and some of the creature comforts of home. Humboldt’s forests and unspoiled beaches are a mecca for wellness-minded travelers, and family-

friendly adventurers. This will be particularly true in a post COVID-19 era where traveling in large groups and vacationing in overrun destinations will have an element of risk.

Humboldt County will begin to win the hearts of tomorrow's tourists by developing content and packaging experiences that speak specifically to each target market. In addition to generating customized, professional content, we'll also focus on integrating nature with towns/communities to highlight the unique culture and opportunity for adventure in each region.

Funding Levels: Unless noted as "Level 2" or "Level 3", all marketing concepts/strategies listed can be accomplished with a "skeleton crew" of three, and contracted freelancers described on page 20.

Branding and Messaging Statement:

DMOs face a real challenge when it comes to branding a destination as a unique value proposition, that incorporates hundreds of independent 'brands' including regions, towns, events, industries, and businesses. Luckily, the path to best practices has already been created by Visit California. Their secret to marketing a massive, multi-faceted destination like the State of California has been to:

- (a) double-down on digital marketing for maximum, targeted reach, and
- (b) get "granular" with customers' needs by developing content and highlighting specific experiences to target markets. (more below)

Of course, a good plan and a proven strategy won't be enough. We'll ultimately need to execute the plan by developing quality content capable of competing in the market, and by building a small but qualified creative team capable of managing modern campaigns. The plan in a nutshell includes:

Digital Strategy and Content Strategy

Video

- Video Goals, Create Custom Video: In an industry worth over \$1.2B to Humboldt County's economy in the next three years, it is imperative that the team has professional, customized video content that appeals to younger target markets. 1,200% more shares come from video than other forms of content, and conversions increase at an average of 80% when properly placed in website landing pages.
- Video Strategy, Targeted Video Views: The "build it and they will come" approach to creating content and earning game-changing traffic had its time in the 90's, but is a losing strategy today as a standalone model. Social media platforms like Facebook/Instagram have perfected their algorithms to ensure only small percentages of followers see your content until backed by ads and paid "boosts". Most Google searches can now be answered without opening the actual website source.

The modern solution is to build a solid base of content (text/video/images) which is both useful and attractive to your target market(s), and then leverage outside communities made-up of your demographic in addition to building your own community. For example, Humboldt's primary targets of younger, high-spending travelers in the Western U.S. are found at the Matador Network. This San Francisco-based digital media company develops customized travel content made specifically for Humboldt's various target markets. It then shares the custom content with the massive Matador Network community (millions) of young travelers.




Tim Wenger
 Mar 20, 2020

Entry-level proposals have been received by Matador Network for custom travel video at three different lengths which is packaged with a guaranteed impressions (millions) and views (hundreds of thousands). Just as important perhaps, they're able to target even further to our specific markets by focusing Humboldt's content on (a) those within a two-day drive, and (b) those near a direct connection of ACV (LAX, SFO, DEN) should air travel eventually become appealing again. For context, see the "Website" section below to fully understand what 500K+ qualified viewers means, compared to HCVB and partners' website traffic of the past.



and digital platforms.

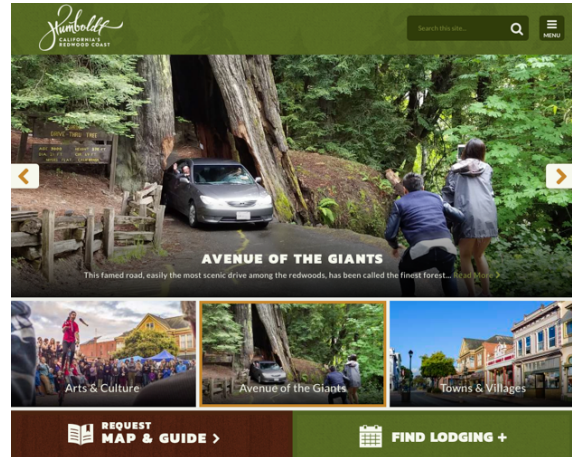
Leverage New Video with Partnerships: Once this video is created, it can then be shared (at no cost) with major tourist portals catering to the same demographic. VisitCalifornia.com for example earns 26M viewers yearly is actively seeking video content from destinations for their active campaigns "Road Trip Republic" and "California Culinary" to name a few. Content will also be shared on the North Coast Tourism Council website

We're currently in discussions with other regions in the county to ensure their upcoming video/media is included in our national and local campaigns. Whenever possible, all groups will promote each other's campaigns with shared content and support.

- Video Strategy, Level 2: In a perfect world, the HCVB's archive of promotional video would go beyond creating a small archive of content focused on young travelers as a group. A more competitive budget would include pieces created for micro-targets (groups of women travelers, Millennial Parents, etc.) The more specific the content, the more likely it will be to resonate with the intended customers. See "You Tube" in Social Media section.

Website

- Website Goals, Inspire Tourism:** The existing website has been generating consistent, significant traffic and working for those interested finding basic information about state parks and related day trips. On the other hand, the content is too generic and outdated to be meaningful to our target markets or represent the entire County. As you can see in a monthly traffic report from earlier in the year (below), HCVB is doing quite well for those already looking for “Redwood National Park”, “Redwood Forest”, and “Agate Beach”. That said, it hasn’t likely been earning new tourists from these searches considering we’re servicing those already familiar with Humboldt County parks and cities. This is also redundant content, matching similar material found on State Park websites and countless travel directories. More strategic content development would earn traffic relating to: “camping trips with toddlers”, “fishing tours for women”, “best destination wedding locations”, or food-related interests like “craft beer tours in California”.



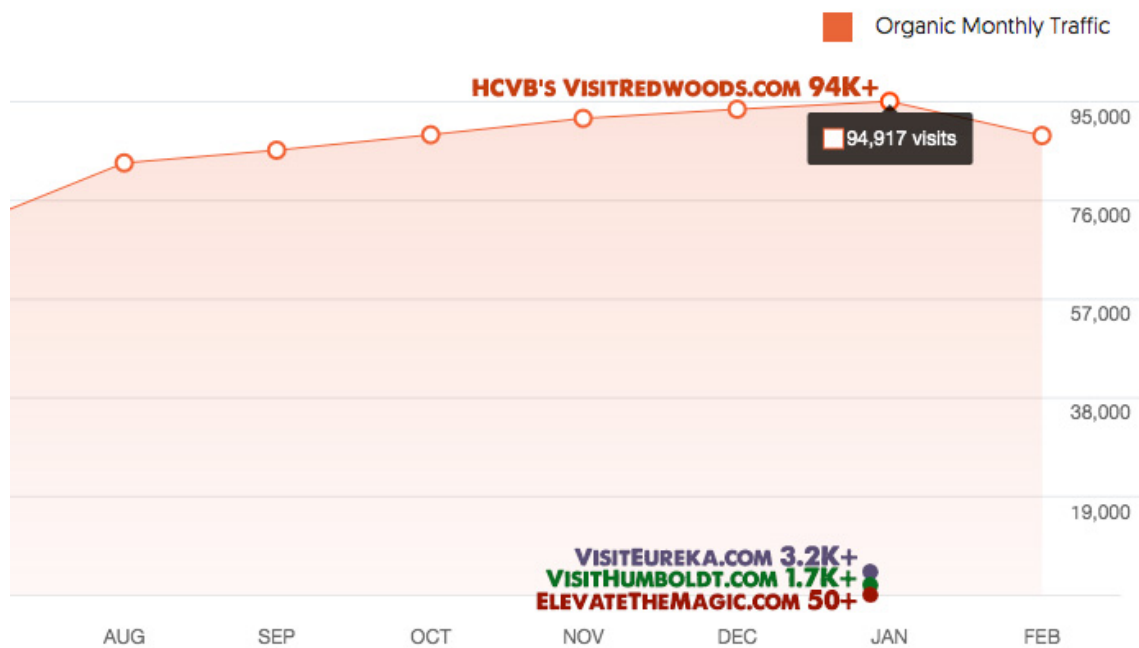
TOP KEYWORDS BY COUNTRY				
	US [83,690]	GB [1,564]	CA [1,545]	AU [691] MORE ▾
SEO KEYWORDS	VOLUME	POSITION	EST. VISITS	
redwood forest	60,500	2	9,801	
arcata ca	18,100	5	849	
drive through tree	2,400	1	730	
red woods	4,400	2	713	
agate beach	4,400	2	713	
humboldt county	6,755	3	657	
redwood national park	13,799	5	647	
humboldt redwoods state park	6,600	3	642	
russ park	1,900	1	578	

Content focused on Humboldt’s forests are an important driver and a winning factor when tourists learn about all the amazing things to do here (early 2020 keyword results below), but it won’t be a successful economic driver when marketed as the only feature. This is particularly true when considering that redwood trees are found throughout the Western United States. Competitive destinations (inside and

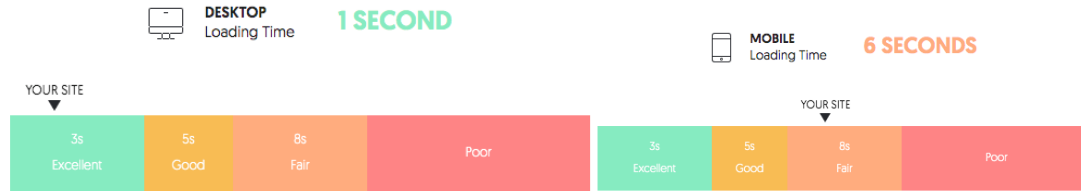
outside of CA) have invested a significant amount more than Humboldt County to win the Billions in Northern California’s travel spend to date.

- Website Strategy, Better Performance for Less: Content issues are easy to remedy, but issues relating to the outdated design and monthly costs have surfaced. A summary of what is working, and what needs immediate fixing:

Working: VisitRedwoods.com has a solid collection of content to build-on, as well as important traffic-driving links from outside sources. This helps HCVB drive over one million viewers to the website per year. As you’ll see in the traffic chart on page 15 the same can’t be said for other local websites who haven’t yet earned meaningful **organic traffic** able to move the needle. The graph below shows Aug 2019 - Feb 2020 estimates of organic traffic using common analytics tools. Actual visitor statistics have not yet been shared with the HCVB, so we’re unsure what their true traffic looks like. What is clear though, is that websites like those below have only achieved traffic from paid clicks and outside advertising spend (not organic traffic). HCVB’s VisitRedwoods.com on the other hand, has a sustainable catalog of information to build-on as well as a network of links earned through being an active player in the travel industry. Traffic will rise consistently with the inclusion of targeted material in both text and video formats.



- Not Working: Content can be viewed by desktop and mobile visitors, but most in our target market would agree it’s not a particularly inspiring experience due to layout, download times, content and ‘buried’ information.



To better meet today’s travelers’ needs, HCVB would be smart to update current template to offer quicker uploads, add video portals and interactive maps, and review the quality of the photos. To start, the HCVB should collaborate with a collective of popular local photographers interested in exposure through HCVB’s web traffic. Loose agreements have already been made with talented local photographers through Instagram, and the same successful system needs to be adopted online.

Much like methods used on social media, we also need to see more strategy in the photos being selected for the website. The existing point-of-view on most photos needs to be replaced with the view from the travelers’ eyes. HCVB’s media exists to inspire our target markets to travel, not simply inform.

Regarding web design, we’ve also seen an usual amount of budget directed towards the hosting of VisitRedwoods.com. HCVB’s contract with web design and server company “Simpleview” costs the organization \$33K per/yr.) a fair price for their major DMO customers like Hawaii Visitors & Convention Bureau or Las Vegas Convention & Visitors Authority, but not for the needs of HCVB. For this reason, we’re in talks with other vendors in search of more appropriate hosting packages.

Level 2 Investment: Given the resources, the Bureau will extend online support to help stakeholders within Humboldt County with their online marketing development. Willow Creek, Arcata and Garberville’s Chambers have expressed interest in the Bureau helping them manage their websites and marketing efforts, and provide basic support to their underserved teams. Not only are the regions overwhelmed with developing their own content to support their branding initiatives, but most consist of a part-time Executive Director with part-time help and/or interns in lieu of dedicated teams.

Social Media



We expect to invest 60% of the Bureau’s advertising budget in highly targeted digital advertising. This includes Google Ads driving viewers to our website(s) combined with targeted social media ads that highlight strategic content while growing our following. Goals and percentage breakdowns for each platform are listed below:

- Facebook Goals: Facebook’s active audience is predominately Boomers and older Gen Xers, and so is HCVB’s 56K+ following (@RedwoodCoaster). This is a fantastic base to

build-on, but we'll need to consider that the majority of this group falls within our secondary target and won't be a priority. The HCVB E.D. has taken the reins of the Facebook feed which has been receiving excellent engagement.



Facebook Strategy: Engagement is solid with the content in place, so no real adjustments are needed to address this lower priority demographic. Only 5% of the digital marketing budget should be allocated to Facebook, and this limited spend should only be directed towards local events attractive to Boomers.

- **Instagram Goals:** HCVB's consultant recently adopted @visitredwoods Instagram account and found a very eager audience. With no paid advertising, but through careful posting and proper hashtag use, we've seen posts reach over 13K+ viewers, significant considering we're just now approaching 9K followers. Instagram is about beautiful photos and Humboldt's Instagram following is well-positioned to double within a year.
 **Instagram Strategy:** We have lofty goals for the Instagram account considering recent performance and upcoming partnerships with Matador Network. Not only do we expect to "be discovered" by Matador's significant social following (255K+ on Instagram), but we'll appeal to new niche markets when our content is shared to target groups. Given 15% investment in micro-influencers and advertising to "Lookalike" audiences, we expect to double our following to 20K while maintaining our higher-than-industry average engagement rates.
- **YouTube Goals:** YouTube is the most popular platform for adults in US. and is increasingly watched streamed on TVs and hand-held devices. Both long and short formats have major reach and impact on with future travelers planning their itineraries. Not only do we need to put significant thought into rebranding the channel with more professional/dynamic graphics, but attention must be paid to the keywords used throughout the channel descriptions, video titles, filenames, and tags.
 **YouTube Strategy:** The Bureau has a great start with content ranging from "Outdoors" and "Attractions" to "Events". The good news is, some of the videos have over 100K views. The bad news, many are over 10 years old and the quality is often pixelated. Also worrisome, many of the most popular posts may be infringing on copyrights (example, National Geographic 2007). Before investing valuable advertising dollars on increasing video exposure, we must first rebrand the channel and populate it with properly compressed footage. Each video needs strategic naming, keywords, and descriptions to maximize organic views. We would expect to invest 15% of our total digital marketing budget on increasing our YouTube views.

Level 2 Investment: As described on page six, the Bureau has been more successful earning tourist revenue "dollar for dollar" (ROI) than the much more generously funded neighboring counties Mendocino, Sonoma, Shasta Cascade, etc.

This outcome shouldn't be taken for granted as we enter a new digitally-focused, post-Coronavirus market. Tourism will be the top income generator for Northern California over the next five years and quite frankly, Humboldt County won't continue to be competitive with the fragmented system seen over the past few years. The Bureau has been financially gutted and is currently working with one full time staff member and one part time admin. When looking for budgeting guidance, review page six for a comparison with neighboring Counties.

Without immediate and significant commitment to increase funding, the \$483M+ in Humboldt County tourist spending in years past will not be matched. Without a more unified approach to actively promote all areas of the county with modern digital marketing campaigns under the HCVB marketing umbrella, the opportunity to grow visitor spend will pass Humboldt County by. The County can no longer continue to depend on Humboldt's redwood trees to drive increased tourism and support a thriving economy.

Print Collateral

Although print lacks the targeting and reporting enjoyed with digital methods, printed materials will always be a useful form of communication for use at trade events distributed within Humboldt County. Materials typically generated in a calendar year include:

Map & Guide: 250,000 (\$33,000 print, \$18,000 distribution)

Yellow Adventure Pads - 50 sheets (already printed)

Marketing Partners

As a facilitator and networking organization, a DMMO is nothing without relationships. HCVB has built a solid network of important media and industry partners throughout County to date, but the internal network is fragmented at best. A few key relationships HCVB's ED has been developing to forge and strengthen mutually beneficial relationships include:

Visit California: As mentioned in our Digital/Content sections, there's a large pool of exposure available through Visit California. Their marketing support through industry research is unmatched, but based on their existing coverage, one would think "Northern California" stops at Sonoma County. HCVB will be more proactive in providing original content, connecting with journalists and influencers especially for the international market. To this end, the HCVB ED sits on the Visit California Rural Counties Tourism Committee which meets quarterly.

North Coast Tourism Council: Established in 2009 under Visit California's Rural Initiative Program, Humboldt County has partnered with Del Norte, Mendocino and Lake Counties to jointly promote the region. Council marketing efforts are supported by funds from each county and a matching grant from VCA. This partnership provides the opportunity to reach a wide

audience and allows for Humboldt to attend major travel industry trade shows to promote county assets. The NCTC website (www.northofordinaryca.com) has direct links to VisitRedwoods and print and digital media platforms promote all counties equally. Julie Benbow is the 2020-2021 NCTC Chair.

Humboldt State University: No real relationship currently has existed with one of the county's largest employers and source of continuous visitors. Julie Benbow has developed a relationship with Dr. Ara Pachmayer, Asst. Professor of Kinesiology and Recreation Administration, Cyril Oberlander, University Library Dean, and Dr. Harinder Singh, Dean of the School of Business. The Bureau has made presentations to students and provided data to support their projects. These relationships are important in two areas: HSU brings a large number of regular visitors/parents with little connection to the rest of Humboldt; and students are valuable interns. We want Humboldt State represented in our marketing calendar, in the same way important regions within the County will be included in our quarterly schedule. COVID-19 has severely impacted HSU students and teaching systems, but HCVB will continue to work with HSU.

Local Tribes: By tradition, HCVB has not associated with local tribes or the hotel/casinos owned and operated by the Blue Lake Rancheria and Bear River Rancheria tribes as they do not contribute to the TOT. Recent meetings with representatives of both have opened communication channels to explore future partnerships, and recent changes to the Bureau's past membership model will help expedite mutually beneficial campaigns.

Humboldt Made and Humboldt Artisans Group: Although these organizations have very different missions, both promote their respective member products. HCVB sees a good deal of crossover when it comes to outreach. A stronger, more strategic HCVB will be in an excellent position leverage the Bureau's relationships to ensure attendance (and successful impact is made) at major trade events attended by target markets outside the area. Humboldt Made has put a good deal of effort in creating consumer events within Eureka and we see amazing potential exposing Humboldt Made and Humboldt Artisans Group members at consumer events in larger venues like Gilroy Garlic Festival (80K+ attendees).

Arts & Culture: The mission of HCVB is to promote all the county assets to attract national and international tourism dollars. The HCVB understands arts & cultural activities are of great interest to multiple demographic groups and will increase the marketing of these assets and events through seasonal and regionals campaigns. Humboldt County has the largest number of artists per capita in the State of California

HLA: The E.D. is currently working with HLA's new Executive Director, Chuck Leishman, to determine how both groups can collaborate and benefit through a partnership of shared marketing assets and other streamlined efforts. The HLA's "Standing Strong" video campaign is a

welcome diversion from “magic-based” themes of the past, and we’re confident that Mr. Leishman’s willingness to work with the Bureau will help both organizations succeed.

Eddy Alexander: The Bureau has developed a relationship with Eddy Alexander, the City of Eureka marketing agency. Our teams have regular meetings align messaging and to ensure there’s no duplication of marketing efforts.

CalTravel Cannabis Marketing Committee: Exciting opportunities are emerging for Humboldt’s cannabis industry, and tourism will be a big part of it as Humboldt’s infrastructure grows to include professionally operated tours and educational events. With the Bureau’s help, Humboldt County will take its place as the heart of cannabis culture as CalTravel and other tourist-centric organizations continue building “The Cannabis Trail”. Our rolodex of press contacts and new outlets will become increasingly important as traditional media embraces the emerging industry.

California Adventure District: *Less People. More Adventures.* Newly established, this is a consortium of ten Northern California rural counties that will be marketed to global outdoor adventurers as a premiere destination. They are developing multi-county experiences (330-mile race from Arcata to Shasta, 2021, bike races). Humboldt County is working closely to support the development of content, itineraries and marketing. www.californiaadventuredistrict.com.

Events

HCVB invests a significant amount of time and budget networking with the travel industry professionals and attending consumer travel events. Due to COVID-19, all 2020 state, national and international travel trade shows and conferences have been cancelled. As yet, few events for 2021 have been scheduled, and none in-person.

Industry Events: The E.D. has been reviewing the line-up of industry events to determine the effectiveness of each. It is crucial for Humboldt County to be represented at the major industry trade shows and conferences. While costly, they offer the opportunity to connect with national and international trade professionals and promote the unique resources, experiences of the county. These events also provide up-to-the-minute trends and best practices.

- Conferences: Visit California / Outlook Forum (Biannual)
- Trade Shows:
 - RTO Summit West (*Personal meetings with international colleagues, focus on Asia*)
 - Go West, (*concentration on the 14 Western states and attracts interested buyers*)
 - IPW (*Most important international travel event, personal appointments*)

Over 85% of tourism to Humboldt County is drive (car, RV) or by bike. The role of HCVB is to attract out-of-county visitors and dollars, exhibiting at Travel & Adventure shows within a certain travel radius for short visits – 4 – 7 days (Sacramento, Chico, Redding, Southern Oregon, Colorado, Bay Area, Los Angeles) is an essential component of the marketing plan.

- Consumer Events
 - Consumer direct:
 - Travel & Adventure Shows – Denver, Bay Area, Los Angeles, Portland (*promote the diversity of outdoor adventures for the traveler interested in off-road and nature-related eco-travel*)
 - State Fair, Sacramento

8 | HCVB's Implementation – Operations and Team Overhaul

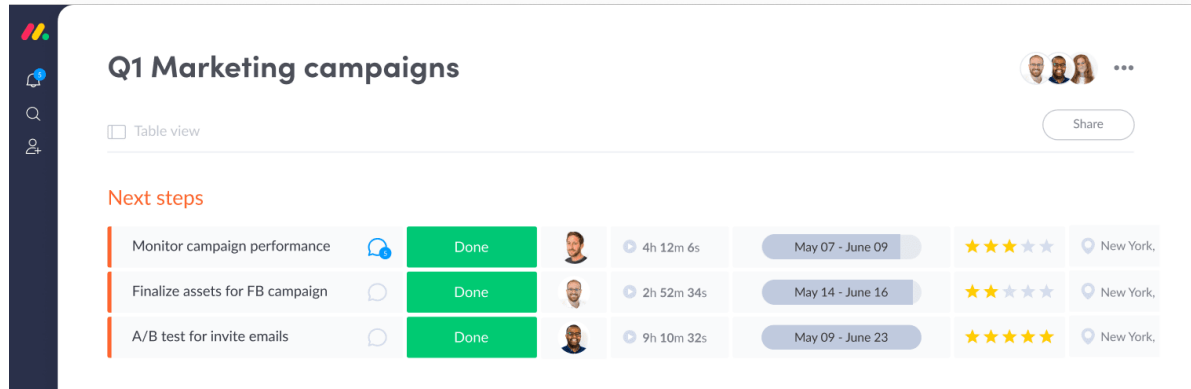
Despite the Bureau's success garnering press and creating content based on our parks and recreational options, it is clear that organizational structure and adoption of new tools are needed to reach a more professional level of service. Focus areas needing attention include:

Marketing Calendar: Stakeholders need visibility of their inclusion in the Bureau's quarterly marketing events, and the Bureau needs to track their effectiveness over time. To that end, in January 2021, the HCVB will incorporate a quarterly/yearly marketing plan that schedules all projects and events. Each region will be represented within the quarterly plan and will be asked to participate by

- (a) working with county regions, helping choose the priority events to be included in HCVB campaigns, and
- (b) actively submitting materials to be included using collaboration software like Monday.com (or related)

Workflow Software: Utilizing workflow software like Monday.com will not only allow a space for the internal team to collaborate with each other on ongoing campaigns, but it will also provide a visual tool for regional partners to review the editorial calendar, be alerted about upcoming events, and offer a method for assets to be shared and exchanged.

(Note) Each region will be offered a sign-in at no cost and trainings will be provided during regular quarterly meetings.



CMO's exist in every tourism center throughout the world, because the workload can't be successfully accomplished by outsourced agencies alone. Put bluntly, agencies are great at developing strategies, brand assets, and campaigns, but they can't be expected to act as gateways to entire regions as CMO's do...nor can outside agencies adequately oversee their own campaigns and promotions.

Although exact titles and responsibilities may vary based-on the teams' unique talent makeup, a DMMO for a region the size of Humboldt County would include a combination of the following roles:

Team Level 1: "skeleton crew" and requires outside consultants and freelancers to properly function.

- Executive Director:** manages the team, oversees the budget, assigns yearly/quarterly campaign priorities, represents Humboldt County in the larger state/national/international events, develops local and outside partnerships, and works with the board to ensure long-term goals are met.
- Marketing Director:** a hands-on manager that runs typical "agency operations" including events, campaigns, communications, and manages all outside vendors. In a perfect world, this person would also contribute to content development and/or digital marketing tasks to ensure the team was as streamlined as possible. S/he would also share event and "press" obligations, scheduled and otherwise.
- Digital Marketer:** responsible for, and owns day-to-day: website operations, search engine rankings, social media posting (not necessarily content), online media spend, email marketing schedule, and related analytics. This person doesn't necessarily need to live in Humboldt County, but this would depend on the actual makeup of responsibilities.
- Office Manager:** overall administrative support including but not limited to: reception, answering phones, low-level accounting, managing payroll, assists with reporting.

Team, Level 2: Increased funding would allow for a larger team to handle common DMO functions in-house including: copywriting, “PR”, graphic design, video creation/editing, and event management.

Hiring an experienced “creative” to handle many of the tasks listed would obviously increase payroll but would benefit the Bureau in the long run as these outsourced services would be much higher outsourced to vendors.

9 | Closing

This plan provides a roadmap to success. Investing in driving tourism to Humboldt County is fundamental to the wellbeing of the businesses and residents, for the arts and culture, the farmers, distillers, cannabis industry, for tour guides, and the thousands of people whose livelihoods depend on the industry.

Humboldt County Visitors Bureau has a very strong history of producing award-winning marketing and gaining millions of dollars-worth of media. The time is right to build on our strengths, expand our efforts and ensure that Humboldt County remains at the forefront of travelers preferred destinations. Thank you for taking the time to learn about the history of HCVB and to help us evolve the Bureau into a modern Destination Marketing Organization capable of ensuring it is a true economic engine for Humboldt County in the future.

Sources:

2. Trends - <https://www.nationalgeographic.com/travel/lists/top-travel-trends-in-2020/>
2. Trends – Intention <https://globalnews.booking.com/bookingcom-predicts-the-top-travel-trends-for-2020/>
2. Trends – Wellness <https://globalwellnessinstitute.org/industry-research/global-wellness-tourism-economy/>
2. Trends – Female Only <https://www.condorferries.co.uk/female-travel-statistics>
- <https://globalnews.booking.com/the-up-and-coming-destinations-inspiring-the-next-generation-of-solo-female-travelers/>
4. Trends – Bleisure <https://www.travelagentcentral.com/resources/stats-millennials-capitalize-bleisure-travel-for-greater-happiness>
4. Trends – Second City <https://partner.booking.com/en-us/blog/bookingcom-predicts-top-travel-trends-2020>
5. Target Markets - Millennial Parents
5. Target Markets – Women Travelers <https://gutsytraveler.com/women-travel-statistics-women-travel-expert/>

Appendix A

Current Humboldt County Marketing Initiatives

As of 2017, regional and city Lodging Alliances could choose to designate funds as they saw fit. Many chose to develop websites, developing content and digital marketing efforts to attract visitors from outside the county to their destinations.

Subsequently, Humboldt's cities and regions have faced challenges to compete, resulting in multiple similar 'campaigns' and websites, and a lack of consistent messaging and communication.

Current Websites promoting Humboldt County

County:

www.visitredwoods.com
www.visithumboldt.com

Funded by:

Humboldt County Visitors Bureau
 Humboldt Lodging Alliance: Self-funded

Regional:

www.redwoodscoastparks.com
www.Garberville.org
www.ElevatetheMagic.com

Orick Chamber: County Funding: Northern Lodging Alliance
 So. Humboldt Chamber of Commerce: County Gateway Funding
 So. Humboldt Business & Visitors Bureau: County Gateway Funding

Cities/Towns:

www.visiteureka.com
www.VisitArcata.com
www.visitTrinidad.com
www.willowcreekchamber.com
www.visitferndale.com
www.discoverredwoods.com

City of Eureka
 Arcata Chamber of Commerce: County Gateway Funding
 Trinidad Chamber, Northern Lodging Alliance
 Willow Creek Chamber, County Gateway Funding
 Ferndale Chamber, Lodging Alliance
 Fortuna Chamber, Lodging Alliance

Region:

www.northofordinaryca.com
www.nationalparks.org
www.nps.gov/redw/index.htm

North Coast Tourism Council: Del Norte, Humboldt, Mendocino, Lake
 National Parks
 Redwoods State & National Parks

Appendix B

HUMBOLDT COUNTY
Travel Impacts, 2010-2019p

Total Direct Travel Spending (\$Million)								
	2010	2012	2014	2015	2016	2017	2018	2019
Destination Spending	341.9	354.0	381.1	392.9	399.9	421.3	452.9	446.5
Other Travel*	35.2	34.1	31.1	29.6	28.7	30.8	33.3	37.3
Total	377.1	388.1	412.2	422.5	428.6	452.1	486.2	483.7
Visitor Spending by Type of Traveler Accommodation (\$Million)								
	2010	2012	2014	2015	2016	2017	2018	2019
Hotel, Motel	159.6	166.3	188.2	201.7	207.2	217.8	233.6	219.3
Private Home	71.7	73.2	72.3	68.1	68.6	74.0	81.4	84.4
Campground	49.8	51.8	55.8	56.9	57.5	60.4	63.3	68.3
Vacation Home	11.3	11.8	11.6	12.1	12.3	13.0	14.2	14.5
Day Travel	49.5	51.0	53.2	54.1	54.2	56.1	60.4	60.0
Total	341.9	354.0	381.1	392.9	399.9	421.3	452.9	446.5
Visitor Spending By Commodity Purchased (\$Million)								
	2010	2012	2014	2015	2016	2017	2018	2019
Accommodations	66.5	69.5	81.8	89.8	94.3	99.6	103.8	96.9
Food Service	96.2	99.7	106.9	113.3	117.4	122.9	132.4	131.2
Food Stores	24.9	26.3	27.4	28.5	28.5	28.9	29.6	30.3
Local Tran. & Gas	57.7	61.9	62.3	58.8	54.8	59.5	67.9	67.7
Arts, Ent. & Rec.	49.8	50.9	54.4	56.3	57.3	58.5	61.6	59.6
Retail Sales	40.1	40.9	43.0	40.4	40.6	44.8	50.6	52.5
Visitor Air Tran.	6.7	4.8	5.2	5.7	7.0	7.1	7.0	8.3
Total	341.9	354.0	381.1	392.9	399.9	421.3	452.9	446.5
Industry Earnings Generated by Travel Spending (\$Million)								
	2010	2012	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	72.4	75.6	86.9	94.6	100.7	108.3	116.9	115.6
Arts, Ent. & Rec.	20.6	21.7	21.7	21.6	22.2	23.9	26.0	25.9
Retail**	9.4	9.7	10.4	10.5	10.8	12.2	13.4	13.7
Ground Tran.	4.8	5.5	6.1	6.6	7.2	8.1	11.0	12.3
Visitor Air Tran.	0.3	0.4	0.5	0.5	0.6	6.4	7.0	8.9
Other Travel*	1.6	1.6	1.7	1.8	2.2	9.6	9.8	13.7
Total	109.1	114.5	127.2	135.8	143.8	168.5	184.1	190.1
Industry Employment Generated by Travel Spending (Jobs)								
	2010	2012	2014	2015	2016	2017	2018	2019
Accom. & Food Serv.	2,910	2,970	3,180	3,280	3,300	3,360	3,520	3,340
Arts, Ent. & Rec.	1,570	1,580	1,530	1,670	1,600	1,600	1,770	1,760
Retail**	350	340	350	340	330	350	370	370
Ground Tran.	130	140	150	160	160	170	210	220
Visitor Air Tran.	20	20	20	20	20	70	70	90
Other Travel*	80	80	80	80	90	140	140	180
Total	5,060	5,120	5,310	5,540	5,500	5,680	6,070	5,970
Tax Receipts Generated by Travel Spending (\$Million)								
	2010	2012	2014	2015	2016	2017	2018	2019
Local Tax Receipts	11.0	11.8	13.4	14.6	15.4	17.5	19.0	18.4
Visitor	6.9	8.0	9.4	10.4	11.1	12.4	13.3	12.7
Business or Employee	4.1	3.8	4.0	4.2	4.3	5.1	5.7	5.7
State Tax Receipts	20.0	18.8	20.5	20.3	19.8	20.4	22.9	23.4
Visitor	16.0	14.8	15.8	15.4	14.9	15.4	17.9	18.3
Business or Employee	4.0	4.0	4.7	4.9	4.9	5.0	5.1	5.1

Details may not add to total due to rounding. * Other Travel includes ground transportation and air travel impacts for travel to other California visitor destinations and travel arrangement services.** Retail includes gasoline. Local tax receipts include transient occupancy taxes, sales taxes, and airport passenger facility charges paid by visitors, and the property tax payments and sales tax payments attributable to the travel industry income of employees and businesses. State tax receipts include sales tax payments and motor fuel tax payments of visitors, and the income tax payments and sales tax payments attributable to the travel industry income of employees and businesses.

Historical revisions have been made on prior years based on the availability of revised source data for cities and counties throughout the state. Economic impacts are attributed to visitor trips which are defined as trips taken by individuals that stay overnight away from home, or travel more than 50 miles one-way on a non-routine trip, as defined by the California Tourism Marketing Act.