

MEMORANDUM

Date: September 5, 2018

To: State Fair Board

From: Margaret Mohr, Deputy General Manager Marketing

Subject: California State Fair June/July/August Staff Report

Marketing Overview for June/July/August

The marketing and media team jumped into several new projects in June of this year, prior to the Fair. The Best of California magazine, Capitol Steps Awards Ceremony and the California State Fair Gala were coordinated by the Marketing Department with support from the programs team.

The marketing and media team coordinated a very successful Capitol Steps event the morning of the Gala. The Capitol Steps event is scheduled on the same day as the Gala to maximize the awardees time at the Best of California reception and it resulted in positive news coverage for the awardees and Gala. Following this press event we had an extremely successful California State Fair Gala. The Gala attendance was up, and funds donated increased. Overall, all three projects and events were extremely well received by the attendees and awardees.



July 4th at Cal Expo was our next big event in partnership with Entercom radio. 30,000 people attended. All reserved seats were sold and it gave the marketing team a great opportunity to promote the upcoming California State Fair with Save the Date concert handouts, special promotions on the radio, a Poppy appearance and Spin the Wheel giveaways for the Fair.

Branding and Marketing Efforts for the California State Fair

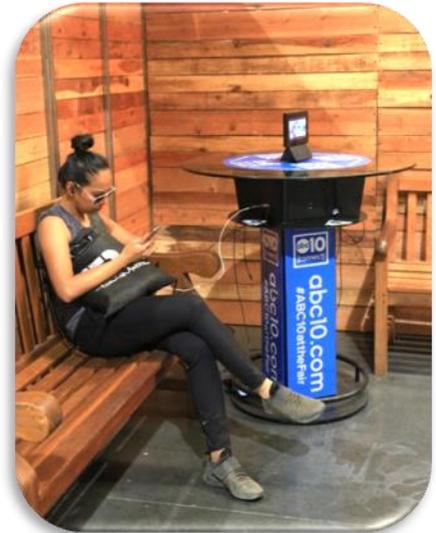
The California State Fair advertising campaign launched beginning June 1 with the theme "Don't Miss a Moment" driving the FOMO *Fear of Missing Out* message. The main action message focused on the Fun Pack and discount tickets as a new effort to get people to buy early. This year, the main advertising message was discount packages, Cool Spots, Silent Disco and Concerts to drive ticket sales. Our advance ticket sales of Fun Packs were down from last year by 111 Fun Packs. Other advance ticket sales passes were down by 500. Costco and Groupon ticket offers were also down in advance of the Fair. Costco went from 9,235 tickets sold with revenue at \$276,958 in 2017 to 7,619 tickets sold and \$243,732 in revenue in 2018. The offer and discount were similar to last year although the Costco package display moved from the front of the store to the middle this year. New this year, in response to slow attendance numbers the first few days of the Fair, we extended the Groupon package throughout the Fair to help drive attendance. Groupon offers a regional marketing package that definitely drives sales and helps to increase our regional reach. The Groupon package prior to the Fair and during the Fair resulted in 42,720 ticket sales as compared to last year at 30,767. (last year it was a pre-fair sale only). Revenue from the Groupon ticket package was \$212,192 in 2017 and rose to \$289,358 in 2018.

Several new ticket packages were offered this year. The Sacramento Zoo and CA State Fair combo resulted in 1,332 tickets sold for \$14,976 in revenue. Both parties would like to see this promotion again next year.



Concert attendance and revenue was up from last year. Attendance at all concerts combined for 2018 was 53,544 with revenue at \$239,785.00. Last year, attendance was 50,646 with revenue at \$222,358.00. We focused our concert message on single artist sales to drive more ticket sales. The competition for a concert audience has increased this year. Black Oak Casino opened their amphitheater and @TheGrounds in Placer County renovations were completed on the Placer County Fair Grounds. Bands such as Modern English played @TheGrounds closing weekend of the California State Fair.

The “Cool Spots” promotion and sponsorship was a major push for us this year. We successfully signed on T-Mobile and ABC 10 to sponsor our “Charge Up and Cool Down” phone charging stations and ABC 10 sponsored our two “cool” misting stations. The misting stations were a big hit of the Fair. “Cool Spots” caught the attention of the media. We received numerous mentions on TV,



radio and print throughout the Fair.

Overview of Marketing Highlights this Year

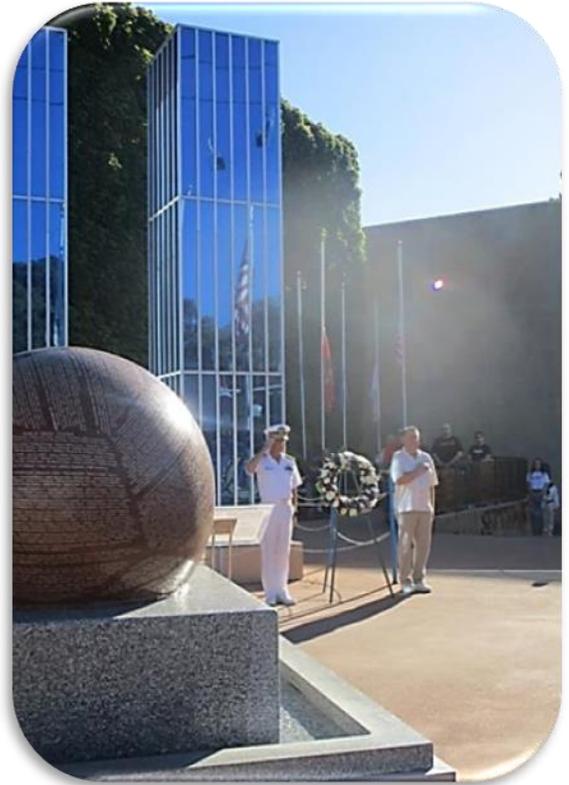
Out at the Fair:

This was the first year for our *Official Out at the Fair Day* on July 29th and we started promoting early with Sacramento Pride. The California State Fair participated in the Pride Parade and Festival. Part of our promotions included announcements from the festival stage for Out at the Fair and banners on the bus and at our booth promoting the day.



Out at the Fair organizers pushed the event socially and worked in partnership with Outward Magazine and the LGBTQ Center. Ca State Fair marketing promoted the event on Instagram, Twitter and Facebook. We also purchased an ad from Outward Magazine to promote the event and the California State Fair. Out at the Fair organizers created the event on Facebook and revealed the event stats; 90,000 people reached, 2,800 people responded to the event and 303 ticket sales clicks.

LGBTQ Center Newsletter Outreach



Navy Week:

The Fair welcomed the Navy this year for the first full week of the Fair. On Monday, July 16th, the Navy did a ceremonial wreath laying at the September 11 Memorial. It was a beautiful tribute with strong attendance and a very nice presentation by the Navy and Rear Admiral Scott Jones, Deputy Commander of the Naval Air Force Atlantic. The Navy band performed all week at various events at the Promenade Stage, Grandstands and Wine Garden and a special induction ceremony for new recruits was held on the Promenade Stage with the Navy Drill Squad. The Navy landed their helicopter in the morning on Military Appreciation Day and Rear Admiral B. Pecha, Medical Corps United States Navy, presided over the opening ceremonies.

Inaugural Youth Mariachi Competition:



A very proud moment for the California State Fair was the first-ever Mariachi Competition. The marketing teams support included Spanish marketing for Mariachi Vargas and promotions with Univision, Latino Times, Telemundo, Entravision and Lazer Broadcasting. All the Spanish language media partners promoted the concert and competition and used their social media platforms. Spanish and general market media was in full support on the day of the competition and came out in

force.

Fox40, ABC 10, KCRA 3, KOVR 13 and the Sacramento Bee covered the full day event. Post media coverage was regional and well received. We have logged and archived all the coverage.

We received a grant for \$15,000 from Visit Sacramento and used that money to promote the competition and concert regionally in Fresno, Bakersfield, Central Coast, Stockton and Modesto.

Giving Monday/SMUD Cares at the Fair:

SMUD sponsored our first-ever Giving Monday program and increased their sponsorship dollars. The Elk Grove Food Bank provided the volunteers and logistics to collect the food



items at all three gates on both Monday's.

Over 3,700 people donated food items and received free admission on the first Monday which boosted attendance before 3 p.m. from 2017 by 11%. Over 5,700 people donated on the second Monday, boosting attendance 9% before 3 p.m.

from last year. The Elk Grove Food Bank received over 29,000 pounds of food in total. The Food Bank was ecstatic that they could stock their shelves for the summer when it's traditionally a very slow time. As Executive Director Marie Jachino said, *"Together we are helping feed over 5,700 struggling food insecure individuals this summer in Elk Grove and South County."*

Community Events:

The Marketing Staff attended 15 pre-Fair community events beginning in April to sell discount tickets and get exposure for the upcoming Fair dates. We strategically picked locations to draw attendance from outlying areas and special events. We reached over 15,000 people and signed up over 2200 people to receive our newsletter. This outreach is time intensive and mostly requires weekend set up and break down. Current staffing handles all April and May events and when interns are hired, they staff most of the other events.



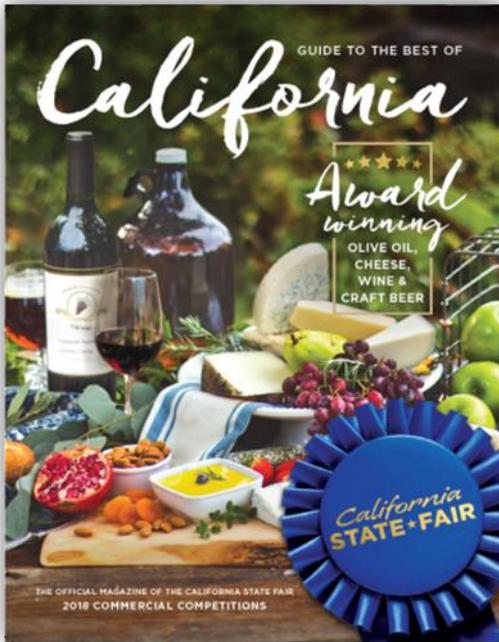
The list of attended events: Kids Day in Rancho Cordova, Raleyfield Brewfest in Sacramento, FISH Family Festival in Sacramento, Honey Festival in Woodland, Komen Race for the Cure in Sacramento, Berry Festival in Roseville, International Kids Festival in Sacramento, Taco Festival in Sacramento, Sac Pride in Sacramento, Front St. Brewfest in Sacramento, Sac Zoo in Sacramento, Farmers Markets in Sacramento, Summer Spectacular in Cameron Park, and Downtown Tuesday Nights in Roseville.

Ride Promotions:

In 2018, a total of 1,968 Read-to-Ride reports were turned in for 3,936 free rides. Out of that total, 15 were Spanish and 6 were Vietnamese. This was the first year a Vietnamese language option was available. Next year, the plan is to add Russian.

For the first time ever, the California State Fair did a Gender Reveal on the large Ferris wheel. A young couple revealed their baby gender to 50 of their friends and family. Four TV stations, the Carmichael Times and KFBK were on hand for the reveal. Butler provided attendees with a free Ferris wheel ride.





Best of California Magazine Distribution:

During the Fair, you could find the Best of California Magazine at the Wine Garden and at the wine, cheese honey and olive oil experience classes. We distributed the magazine at Brewfest and at the Counties reception and award ceremony. Following the Fair, the magazines are distributed at the Tower Bridge Dinner and the Farm to Fork Festival.

Horse Racing – A special emphasis was placed on Horseracing this year. In an effort to build awareness and drive traffic to the Grandstands we brought back the National Wiener Dog races, Steam Punk at the Races and hosted over 1000 beer enthusiasts at Brewfest. We had several media events at the Turf Club. For instance, The River’s, Dog and Joe Show promoted horseracing for a week and invited viewers to the Turf Club and KFBK’s, Pat Walsh hosted

racetrack announcer Chris Griffin on his hour long radio show. We created a new and improved wheel and brought new prizes to the Spin to Win program.

Sponsorships 2018

Event Partnership had a very successful Fair. Adding new accounts and improving on cash sponsorships over all. *Winery of the Day* sponsorships were up and the Mariachi Competition brought in new dollars. Although several sponsorships did not return this year, it’s important to note with *Winery of the Day* sponsorship included, total dollars increased by \$41,687 this year. We are proud to say that overall we are up compared to other Fairs.

Sponsorship Cash *(not including Best of CA Magazine Wine Ads and Winery of the Day Revenue)*

- 2018 cash sponsorship sales \$2,203,886.94 - up \$33,436.82 over 2017
- 2018 cash sponsorship revenue amounts to **\$3.85 per Fair guest**

Sponsorship Trade

- 2018 trade sponsorship sales \$327,222.71

Total Sponsorship Cash & Trade

- 2018 cash and trade \$2,757,609.65

California Wine Ads & Winery of the Day Cash

- 2018 Winery of the Day/Wine Ads sales \$226,500.00 - up \$8,250 over 2017

Total Sponsorship Revenue *(Cash, Trade, Wine Ads, & Winery of the Day)*

- 2018 sponsorship revenue amounts to **\$4.82 per Fair guest**

Sponsor Revenue Comparison per Fair Guest

* note all data is not from 2018

Year	Fair	Length of Fair/Days Open	Cash Sponsorship*	Total Attendance	Sponsor Dollars Per Guest
2018	California State Fair	17/17	\$2,203,886**	572,250	\$3.85 per Guest
2016	LA County Fair	24/19	\$3,365,000	1,300,000+	\$2.59 per Guest
2018	San Diego County Fair	33/26	\$3,895,000	1,561,236	\$2.49 per Guest
2017	Big Fresno Fair	12/12	\$1,450,000	609,036	\$2.38 per Guest
2018	Alameda County Fair	17/17?	\$690,000	423,418	\$1.63 per Guest
2018	Orange County Fair	31/23	\$1,763,000	1,470,036	\$1.20 per Guest

*Represents “cash” received through sponsorship. Does not include “in kind” trade, such as equipment rental trades, advertising trades, product trades, etc. Data was obtained by contacting each Fair.

**Not included in this number is an additional \$226,500 in cash raised by Cal Expo’s sponsorship company (Brian Honebein, Event Partnerships) through the sales of advertising in the Best of CA magazine.

2018 Highlights

- Traffic Drivers to Horseracing
 - SplashDogs – Middle weekend of horseracing, great traffic driver
 - Wienerschnitzel Wiener Nationals (Final weekend, promoting horseracing, huge media impact)

- Mariachi Competition – \$70,000 in new sponsors
 - Ford
 - Thrivent Financial
 - Sprint
 - Mercury Public Affairs
 - California Endowment

- SMUD sponsoring “SMUD Cares at the Fair – Giving Monday” \$55,000 sponsorship up from last year
 - Received nearly 29,000 pounds of non-perishable food items for the Elk Grove Food Bank

- Increased cash sponsorship investments DirecTV (\$14,000), SMUD (\$10,000), T-Mobile (\$30,000), Groupon (\$38,422), Tractor Supply Company (\$4,000), GTN (\$5,000)

- Two (2) animated movie character mobile tours - Hotel Transylvania 3: Summer Vacation and Smallfoot

- Twelve (12) Mobile Tours, accounting for \$84,000
- BloodSource 1,063 lifesaving pints collected, just at the Cal Expo blood drive. BloodSource also purchased 4,911 tickets (ticket revenue in addition to sponsorships \$43,110.00)!
- In addition to their sponsorship, Chevrolet donated \$2,500 to the 2018 Sale of Champions Booster Club and Tractor Supply Company donated a barrel fan and swamp cooler for the Ag Family Cooling Area

New Sponsors:

- Ford
- Thrivent Financial
- Deluvia, Inc.
- Sprint
- Mercury Public Affairs
- California Endowment
- ABC 10

Advertising

The advertising budget was reduced by \$133,000 this year however, we strategically only reduced the media buy by \$30,000 dollars. The strategy going into the buy was to reduce production and print costs as much as possible so that the digital, social and broadcast media buy would not be cut as much. Overall all impressions increased as we had several media partners that contributed to increased TV exposure. ABC 10 was a much bigger partner this year with on-air TV spots promoting our “Cool Spots” and Mark S. Allen living at the Fair for three full days. He was an incredible asset to the Fair this year, promoting every aspect of the Fair on-air from July 13th – July 18th and in social media while he slept in the log cabin and began his day at 4 a.m. He did on-air packages and live shots in the morning show and continued with coverage into the early evening shows. KOVR and Good Day Sacramento also partnered with their daily Blue Ribbon Highlights on Good Day Sacramento and nightly Concert Weather Forecasts in their evening shows. These promotions were part of the overall media buy based on dollars spent.





Radio promotions increased this year and total media mentions are included in the media section. Below is a breakdown of cost, added value and impressions for our advertising campaign. The added value does not include earned media. This is only paid media.

2018 CSF Summary of Spend & Added Value by Media

VEHICLE	2018			2017		
	PAID VALUE	ADDED VALUE	IMPRESSIONS	PAID VALUE	ADDED VALUE	IMPRESSIONS
DIGITAL	\$165,249	\$60,693	27,130,615	\$146,505	\$17,586	21,955,848
OUTDOOR [^]	\$213,249	\$30,450	78,218,696	\$211,700	\$37,060	94,306,858
ALT OOH*	n/a	n/a	n/a	\$14,000	n/a	n/a
PRINT	\$29,487	n/a	4,459,818	\$57,201	n/a	7,268,840
TV	\$264,199	\$495,730	20,493,911	\$261,240	\$80,966	18,924,049
RADIO	\$134,058	\$784,682	17,379,800	\$141,773	\$173,401	19,055,322
TOTAL	\$806,242	\$1,371,555	147,682,840	\$832,419	\$309,014	161,510,917

Dollars are reflective of billed media spend.

Previous year's added value was calculated to reflect media only. 2018 added value reflects all elements including on-site events as well as on-air programming features.

[^]In 2017, there was an increase of impressions as a result of added value provided as make-goods for vendor inventory complications.

2018 CSF Mariachi Vargas Summary of Spend & Added Value by Media

2018			
VEHICLE	PAID VALUE	ADDED VALUE	IMPRESSIONS
DIGITAL	\$2,000	n/a	299,358
PRINT	\$500	n/a	100,000
TV	\$6,000	\$32,100	1,441,549
RADIO*	\$5,767	\$935	926,400
TOTAL	\$14,267	\$33,035	2,767,307

*Radio added value is only for out-of-market radio and does not include in-market promotions.

Media

We had extremely successful earned media exposure this year. With daily e-mail blasts to media that previewed upcoming Fair events, the Media Center team made daily pitch calls to local television and radio stations and print publications.

Coverage of the 2018 CA State Fair began as early as in February 2018. According to the media gathering website Critical Mention, as of August 9, there were 1,390 stories about the 2018 CA State Fair which reached an estimated audience of 153,712,329 people for a total estimated publicity value of \$7.3 million. The Media Center's efforts resulted in 776 TV mentions/reports, 267 radio mentions and 785 online articles about the 2018 California State Fair (February 1 – August 9, 2018). **Please see the attached spreadsheet for a full list of coverage the Fair received.*

Over 50 media outlets attended Media Day this year which was held the day before opening day of the Fair. The media team issued 441 media credentials in 2018, which is down from the 531 media credentials issued in 2017. This year, we were more selective about who was approved for media credentials and how many each media type could request. The credentials were requested by a mix of local, state, and even national television, radio, print and online publications. Media outlets are only approved if they have above 1,000 followers and will post 2 or more stories. This requirement mostly applies to social media.

Social Media

In 2018 the Fair continued to step up its presence on Social Media. "Likes" on Facebook grew by nearly 2K, and Instagram continued to have the highest growth with 1,549 new followers.

Facebook – 1% increase from 200,414 (as of July 4, 2018) to 202,234.

Instagram – 14.5% increase from 10,719 to 12,268

SnapChat – Our SnapChat score had a 7% increase from 875 to 950.

The Media Center also directed its attention to video, social media, and live-streaming. 60 videos were created and posted on Facebook, YouTube and Instagram. From July 4 – 29, the videos on Facebook received more than 248K views.

- Facebook Live – 43 Livestreams
- 10 produced videos
- Highest organic engaged Facebook Video "Cal Expo Police Lip Sync with **30k views**, reaching 74,133 people

*We are the
most-liked
Fair on the
West Coast.*

Here is how the California State Fair ranks with other Fairs and events in terms of Facebook Fans. We are proud to say that we are leading with the most followers.

2018 Business/Organization	Facebook Fans
1. California State Fair	202,234
2. Los Angeles Co. Fair	163,410
3. Washington State Fair	140,378
4. Arizona State Fair	124,937
5. San Diego Co. Fair	116,291
6. Orange Co. Fair	117,998
7. Alameda Co. Fair	109,515
8. Sacramento River Cats	103,499
9. Sac Republic FC	91,071
10. Alaska State Fair	90,740
11. Oregon State Fair	55,377

Digital Media

Digital and social media continues to be an important part of our media buys. It is necessary in today's media world to reach the younger audience. Un/Common knows the importance of this and has used many new ways to reach this younger audience on the devices they spend a lot of their time on. Here is a sample of the results of our efforts on digital media.

Highlights:

- 2.1 million video completions across Pre-roll and OTT
- 3.3 million digital radio impressions across audio and companion banners
- 1.6 million banner impressions promoting concerts
- 7.7 million impressions across Facebook/Instagram, with a variety of clicks, engagements and video views
- 4 million video/banner impressions across Snapchat video and retargeting banners, and geo-filters
- 3.1 million native ad impressions, including article promotion and retargeting ads

Website tracking pixels are utilized to assist with optimization of the digital buy.

Website

Good news, we continue to drive a large amount of website traffic to CAStateFair.org. This year we have had over 3 million page views starting from the beginning of the campaign in March through July 2018. The pages views from March to July show peaking on the concert presale launch date March 28 with 15,076 views, the first day of Fair July 13 with 132,799 views, the second Saturday July 21 with 114,398 views and the final Saturday July 28 with 75,474 views.

In July alone, there were 1,791,869 unique visitors to the site, just under last years' number of 1,880,410 unique visitors. The ticket page had the most views, 572,035 in July, which is 27% of the total views. The second highest viewed page was the homepage at 24% with 506,489 views in July. CAStateFair.org and CalExpo.com continue to be an important source for our fairgoers to get information and buy tickets.

CSF App

A total of 70,108 people have downloaded the App since 2015. This year, 14,440 new users were added. Using data gathered from app provider, Aloomba, we are able to see that 22% of users are 25-34 years old followed by 20% of users at ages 35-44. Further demographics show that 58% of total users are women.

Within the app, users are able to plan their day by "scheduling events." Some of the most scheduled events were Acrobats of Hebei China, Splash Dogs followed by Jack in the Box FMX.

Here are the significant APP statistics.

Total Screen Views: 563,758

Screen View Stats per page:

- Home Page 89,544
- Features 51,811
- Food Favorites 39,923
- Concerts 33,678
- Map 23,810
- Where to Go 10,352

Total time spent on the App averaged 6:37.

End of Fair Survey Results:

This year we did three surveys: One on-ground, one online and one in the CA State Fair App. You can find two of the full survey results below:

Online and APP Survey Results are in word documents attached to this report.

Below is a sample of the online survey that 2300 people completed. 2,300 completions for a survey is a statistically valid survey. The online survey also included 200 people who did not attend and why. Here is just a few of the questions and results.

At the end of the survey, attendees were able to write in more of their thoughts on the Fair this year. We grouped comments by topic for your review.

- **Did you have fun at the Fair?** Yes - 96%
- **Did you feel safe at the Fair?** Yes - 98%
- **Did you see new attractions this year?** Yes - 63%
- **Did you find the Fairgrounds clean?** Yes - 96%
- **What brings you to the Fair?**
 - Exhibits - 35%
 - Main Stage Concert - 19%
 - Fairgrounds entertainment - 15%
 - Food - 10%
 - Animals - 7%
 - New or affordable ticket packages - 7%
 - Horse Racing - 5%
 - Special Event (Brewfest, OATF, Jaripeo) - 2%
- **What was your favorite exhibit this year?**
 - Silent Disco - 19%
 - CA Counties - 15%
 - Fur & Feathers - 10%
 - Photography - 7%
 - Crafts - 6%
 - Student Showcase - 5%
 - Fine Art - 5%
 - National Geographic - Future of Food - 3%
 - Life's Big Ag-Venture - 2%
 - CA Strawberries - 2%
 - CA Rice - 1%
 - Other - 25%
- **Will you come back next year?**
 - Yes – 95%
 - No – 5%

Overall, although attendance was down this year, there were some significant positive outcomes. Media stories and mentions were positive highlighting the unique aspects of the California State Fair. Partnerships in the community increased with organizations like the Elk Grove Food Bank, Sacramento Zoo to the Hispanic media. Final survey results reveal our fan base loves the California State Fair, enjoys clean grounds, feels safe and will return next year.