

#nttw18

years ago

Congress brought the idea of

# NATIONAL TRAVEL & TOURISM WEEK to life.



How are you celebrating?



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THANK YOU TO THE
ADVISORY COMMITTEE

Jim Bergman, City Manager, City of Arroyo Grande Matthew Bronson, City Manager, City of Grover Beach Scott Collins, City Manager, City of Morro Bay Lynn Compton, Supervisor, County of San Luis Obispo Red Davis, Council Member, City of Morro Bay Thomas Frutchey, City Manager, City of Paso Robles Barbara Harmon, Council Member, City of Arroyo Grande Heidi Harmon, Mayor, City of San Luis Obispo Wade Horton, County Administrative Officer, County of San Luis Obispo Erik Howell, Mayor Pro Tem, City of Pismo Beach Derek Johnson, City Manager, City of San Luis Obispo Jim Lewis, City Manager, City of Pismo Beach Steve Martin, Mayor, City of Paso Robles Tom O'Malley, Mayor, City of Atascadero Rachelle Rickard, City Manager, City of Atascadero Mariam Shah, Mayor Pro Tem, Grover Beach

THANK YOU TO THE MARKETING COMMITTEE Ashlee Akers, Verdin Jim Allen, Hearst Castle Audrey Arellano, Cambria Inns Terrie Banish, City of Atascadero Jocelyn Brennan, Arroyo Grande & Grover Beach Chamber of Commerce Molly Cano, City of San Luis Obispo **Cheryl Cuming, Unincorporated County Business Improvement District (CBID) Christen Goldie**, The Apple Farm Gordon Jackson, Pismo Beach CVB Jennifer Little, City of Morro Bay Courtney Meznarich, AMF Media Group Heather Muran, San Luis Obispo Wine Country Association Jennifer Porter, Paso Robles Wine Country Alliance John Sorgenfrei, TJA Advertising **Danna Stroud, Travel Paso** Jill Tweedie, Breakaway Tours & Event Planning

THANK YOU TO THE

#### **BOARD OF DIRECTORS**

Clint Pearce, Madonna Inn, San Luis Obispo • Chair John Arnold, Holiday Inn Express, Paso Robles • Vice Chair Aaron Graves, The Rigdon House, Cambria • Treasurer Lori Keller, Martin Resorts, Unincorporated SLO County • Secretary Jay Jamison, Pismo Coast Village, Pismo Beach • Past President Kathleen Bonelli, Paso Robles Vacation Rentals Mark Eads, SeaVenture Beach Hotel, Pismo Beach Jim Hamilton, SLO County At-Large Appointee Sarah Maggelet, Sarah's Suite, Unincorporated SLO County Sam Miller, Holiday Inn Express, Grover Beach Nipool Patel, Lamplighter Inn & Suites, San Luis Obispo Val Seymour, The Front Street Inn & Spa, Morro Bay Amar Sohi, The Holiday Inn Express & Suites, Atascadero Roger Wightman, Sandcastle Inn, Pismo Beach



Brooke Burnham, Vice President of Marketing Michael Wambolt, Director of Travel Trade Keba Baird, Director of Communications **Brendan Pringle, Operations Manager** Yarina Valverde, Brand & Digital Manager Jordan Carson, Marketing Coordinator Kylee Corliss, Film Commission Liaison

Chuck Davison, President & CEO



**BUILD AND EXPAND STRATEGIC PARTNERSHIPS** 

## LOCAL, REGIONAL & NATIONAL























## LOCAL, REGIONAL & NATIONAL



SAN LUIS
OBISPO
CHAMBER
COMMERCE







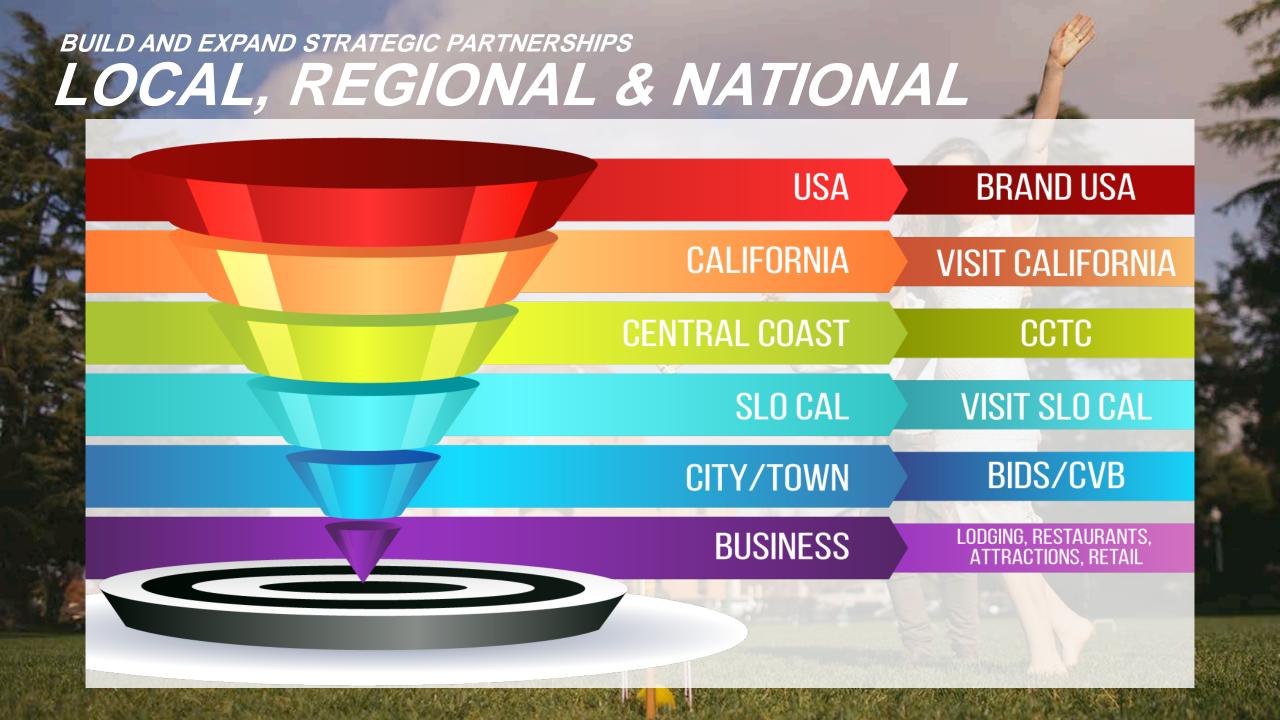
















### BRAND DEVELOPMENT



ACTIVE ADVENTURER

- Active, Mid-Highly Affluent, Educated
- Deeply Passionate Experience-Seekers

MOM TO THE MAX

- Scheduled, Connected, Affluent
- Wants Connective, High-Value Activities

**CULTURED CLASS** 

- Educated, Professionals, Risk Takers
- Desires Immersive, Unique Experiences



## BRAND DEVELOPMENT

## 2017-18 BRAND INITIATIVES

- Produced two rounds of aerial,8K video footage
- Launched new SLOCAL.com
- Obtained Trademarks for SLO CAL logo & Life's Too Beautiful to Rush®





### BRAND DEVELOPMENT

## POPPY AWARD: BEST DIGITAL CAMPAIGN

- Finalists included San Diego,Anaheim & Monterey
- Life's Too Beautiful to Rush® new SLO CAL brand campaign
- Developed by Creative Agency, BCF
- Native, social, video & banner display ads













## STRATEGIC PARTNERSHIPS







UNITED



American Airlines



INFRASTRUCTURE: AIR SERVICE DEVELOPMENT

## FLY MARKET SUPPORT

#### ALASKA DIRECT SERVICE FROM SEATTLE

- \$250K+ in marketing support for Seattle
  - Advertising, paid media & SAVOR
- Reached annual projections in 9 months
- SLO CAL Wine Flies Free













INFRASTRUCTURE: DESTINATION MANAGEMENT STRATEGY

#### ASSESSMENT & PLANNING

#### PROGRESS TO DATE

- Board selected Resonance Consultancy in January
  - Oversee process & facilitate strategy
  - Experts in destination planning
- Work commenced in April
- Tourism Economics conducting economic impact & visitor volume research
- Steering Committee identified & engaged







INFRASTRUCTURE: DESTINATION MANAGEMENT STRATEGY STEERING COMMITTEE Jim Bergman, City Manager, City of Arroyo Grande Matthew Bronson, City Manager, City of Grover Beach Kevin Bumen, Director of Airports, San Luis Obispo County Regional Airport Scott Collins, City Manager, City of Morro Bay Ronald De Carli, Executive Director, San Luis Obispo Council of Governments Thomas Frutchey, City Manager, City of Paso Robles Andrew Hackleman, Executive Director, Home Builders Association of the Central Coast Melissa James, Director of Economic Initiatives, San Luis Obispo Chamber of Commerce Derek Johnson, City Manager, City of San Luis Obispo Jim Lewis, City Manager, City of Pismo Beach Bob Linscheid, Advisor to the President, Cal Poly University Mike Manchak, President & CEO, Economic Vitality Corporation Clint Pearce, President, Madonna Enterprises Rachelle Rickard, City Manager, City of Atascadero Guy Savage, Assistant County Administrative Officer, County of San Luis Obispo



INFRASTRUCTURE: DESTINATION MANAGEMENT STRATEGY

#### ASSESSMENT & PLANNING

"If you build a place people want to VISIT, you build a place where people want to LIVE. If you build a place where people want to live, you build a place where people want to WORK. If you build a place where people want to work, you build a place where BUSINESS has to be. And, if you build a place where business has to be, you'll build a place where people have to VISIT."

**Maura Gast** 







DEMONSTRATE VALUE TO PARTNERS

## HIGHWAY ONE CLOSURE

## BEST BUDDIES CHALLENGE HEARST CASTLE

- Partnership with Visit California
- Annual charity ride with 600+ riders (including celebrities)
- VCA & Best Buddies social media exposure
  - 7,800 engagements
  - 331K impressions



HIGHWAY ONE CLOSURE

# OUTREACH & COMMUNICATION

Advocacy with elected officials



Lt. Governor Gavin Newsom

# HIGHWAY ONE CLOSURE

# OUTREACH & COMMUNICATION

- Advocacy with elected officials
- Support for North Coast partners



**Assemblyman Jordan Cunningham** 

# HIGHWAY ONE CLOSURE

# OUTREACH & COMMUNICATION

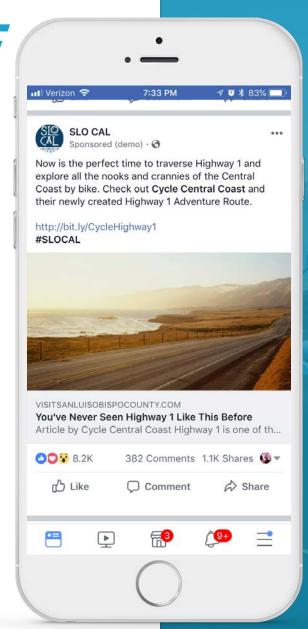
- Advocacy with elected officials
- Support for North Coast partners



# HIGHWAY ONE CLOSURE

# HIGHWAY ONE SOCIAL MEDIA AD CO-OP

- Six participating Highway
   One businesses &
   partners
- Individualized ad campaigns
- \$1 for \$1 match





**756,000**Total Reach



676,000
Partner Referrals



48,000 Blog Shares





# INTERNATIONAL

#### **U.K. & IRELAND**

- Direct representation
- Multi-city sales mission
- Attended World Travel Market for the first time

#### **CHINA**

VCA China Sales Mission

#### **MEXICO**

VCA Mexico Sales Mission



DEMONSTRATE VALUE TO PARTNERS: TRAVEL TRADE

## TOUR & INTERNATIONAL

#### 8 FAM TRIPS

- U.K. Super FAM
- Travel Weekly U.K.
- Australia Super Stars
- Virgin Holidays
- American ToursInternational
- Nan Hu Tours
- Dista Travel
- GTA, Tourico, JBS, Hotelbeds

#### **4 TRADE SHOWS**

- World Travel Market (U.K.)
- National Tour Association
- Go West Summit
- IPW



FAM Attendees



129
Appointments



**\$119M**Buying Power

DEMONSTRATE VALUE TO PARTNERS: TRAVEL TRADE

# MEETINGS & CONFERENCE

#### **SALES MISSION**

San Francisco Bay Area

#### **TRADE SHOWS**

- MPI EXPO San Francisco
- CalSAE Seasonal Spectacular



**51** Leads & Prospects



**42**Appointments



DEMONSTRATE VALUE TO PARTNERS: TRAVEL TRADE

UNIQUE LODGING

#### **LODGING INDUSTRY SHOW**

 Vacation Rental Management Association (VRMA) National Conference in Orlando

#### **CONSUMER SHOW**

RV International Association (RVIA)
 Consumer Show



40,000 Total Attendees







### FILM SLO CAL

#### **TV & COMMERCIAL**

- Commercials & TV
- Feature film with Keanu Reeves & Winona Ryder
- Videos for Nick Jonas & Lady Antebellum

#### **SLOIFF PARTNERSHIP**

- Partnered with SLOIFF to promote film industry around event
- Leveraged event for film producer& location manager tour





+50%
YOY Productions

**\$3.1M**Direct Spend























DEMONSTRATE VALUE TO PARTNERS: FILM SLO CAL THE PATH **FORWARD BUILD PROMOTIONAL TOOLS & RELATIONSHIPS** New Film SLO CAL promo video Refresh Film SLO CAL advertising creative Continue to build industry connections, locally & nationally



## **EVENTS: SAVOR ON THE ROAD**













# PAID MEDIA AD CO-OPS

#### FIRST DIGITAL AD CO-OP

- 5 participating SLO CAL partner destinations
- Leverage VSC campaign
- Social & native ads
- Goal: Increase awareness in key target markets





**10.6M**Total Reach



**87,000**Ad Clicks



**\$170K**Total Spend

# PAID MEDIA BRAND CAMPAIGN

#### **PERFORMANCE METRICS**

- Viewability & engagement:
  - High-quality ad placements
  - Video view completion
  - Website activities
- Tracking arrivals through Arrivalist





-6.8%
Bounce Rate



+7.0%
Session Duration



+10.7%
Arrivals
YOY, Jan-March

## EARNED MEDIA

#### **PR AGENCIES**

- New domestic agency: TURNER Public Relations
  - Denver, Chicago, Miami & N.Y.
- U.K. & Ireland: Black Diamond

#### **KEY TACTICS**

- Two group media visits
- Ongoing proactive pitching
- 1:1 media TOURS: U.K., N.Y., L.A., Seattle & Denver
- Visit CA Media Events: Seattle, N.Y. & L.A.



**65**Journalists Hosted



136 Media Articles

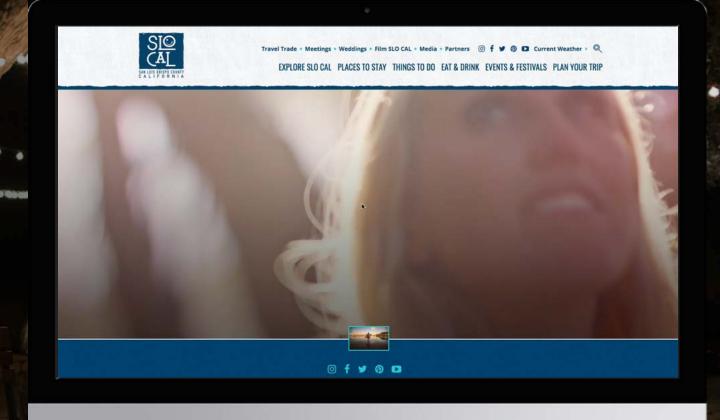


173M+
Total Circulation

# OWNED MEDIA: SLOCAL.COM

#### **NEW LOOK + FEATURES**

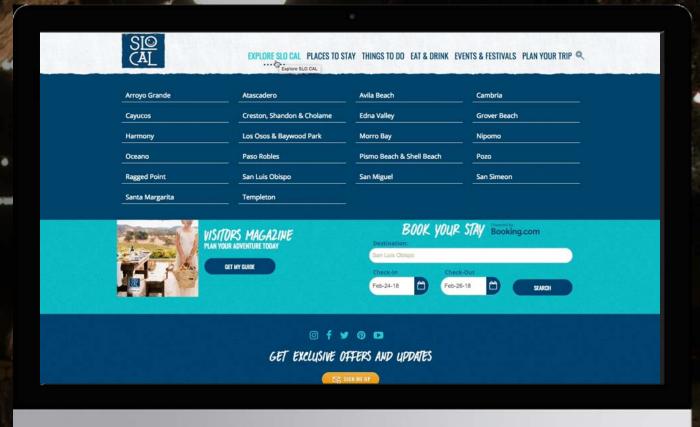
- Homepage video header
- Expanded destination pages
  - Aerial video 'postcards'
- Larger business profile page
  - No longer members only
  - New Trip Advisor, Yelp & Open Table integration
  - New photography for all hotels & motels
  - SLO CAL Connection Industry Hub



# OWNED MEDIA: SLOCAL.COM

#### **NEW LOOK + FEATURES**

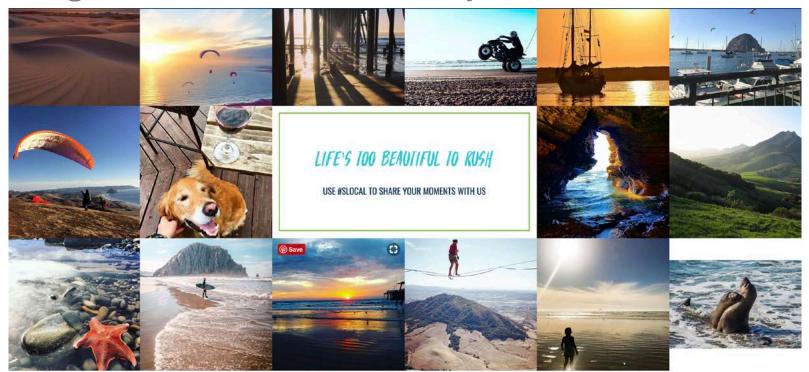
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### OWNED MEDIA: SOCIAL

#### **NEW USER-GENERATED CONTENT APP**

- Display galleries on SLOCAL.com
- Request & track image use rights
- Negotiated 58% discount for partners





32K
Facebook Followers
+54% YOY



19.5K Instagram Followers

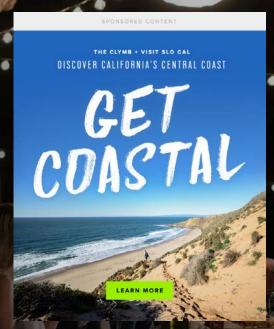
+56% YOY



# CONTENT PARTNERSHIP







#### **LEFTLANE SPORTS & THE CLYMB**

3 Blog Posts

- 6 Web Ads
- 13 Email Banners 21 Social Posts





24K+ Website Pageviews



214K+ Social Impressions



768K+ **Email Impressions** 

Total: 1M+

## THE PATH FORWARD

#### **EVENTS:**

- Add Denver SAVOR
- Grow Partnerships

#### **PAID:**

- Continued Optimization
- New Creative Imagery & Video

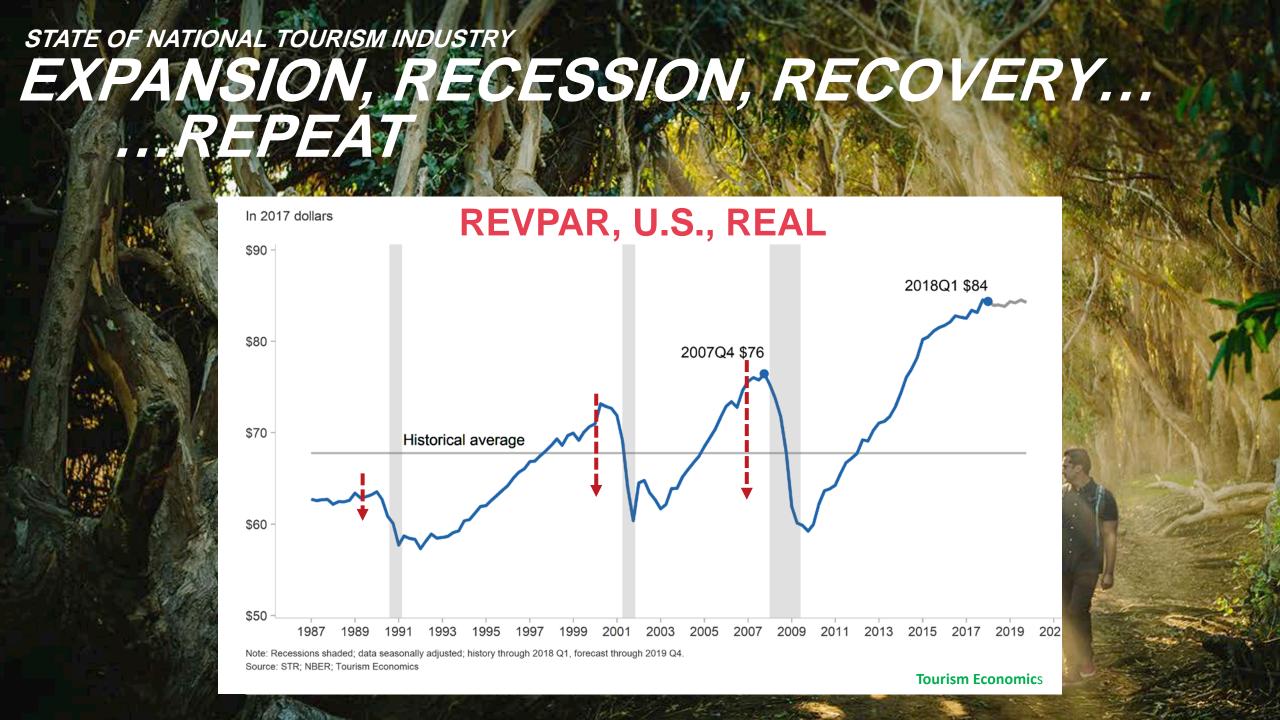
#### **EARNED:**

- Grow PR Reach
- Expand Influencer Programs

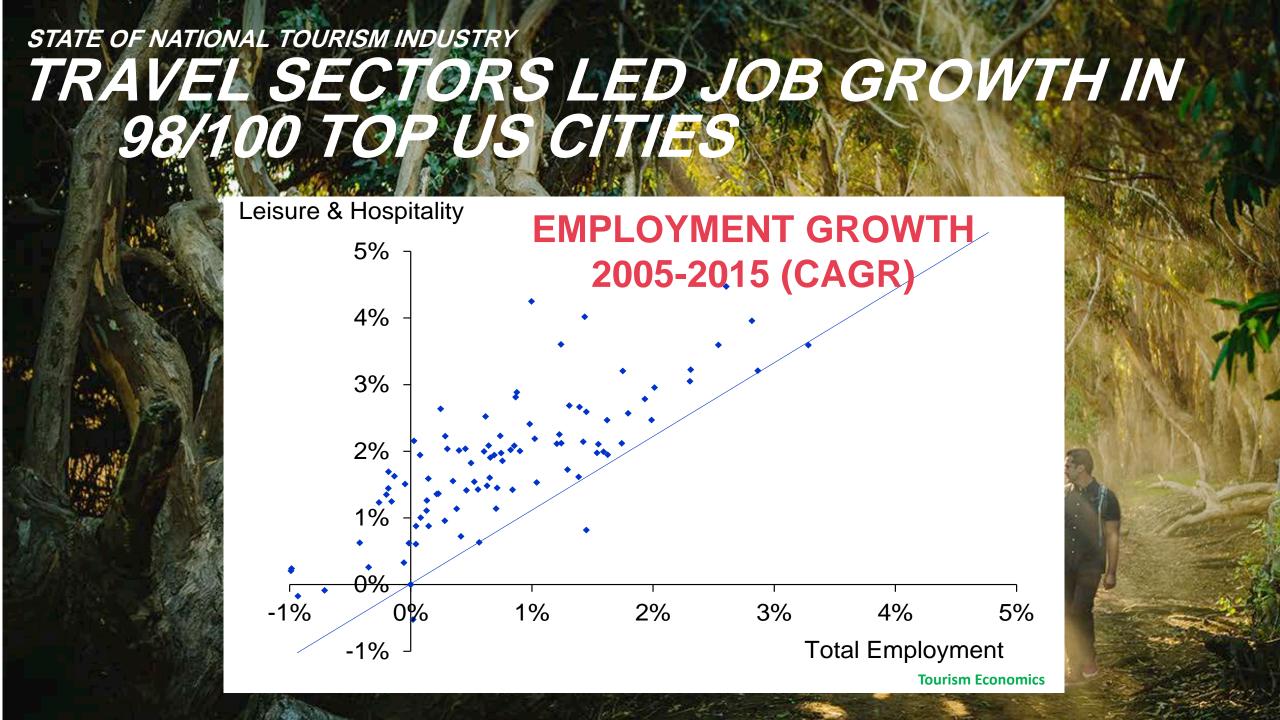
#### **OWNED:**

- Strategic Content Production
- SLO CAL Crafted
- #SoSLOCAL Ambassadors



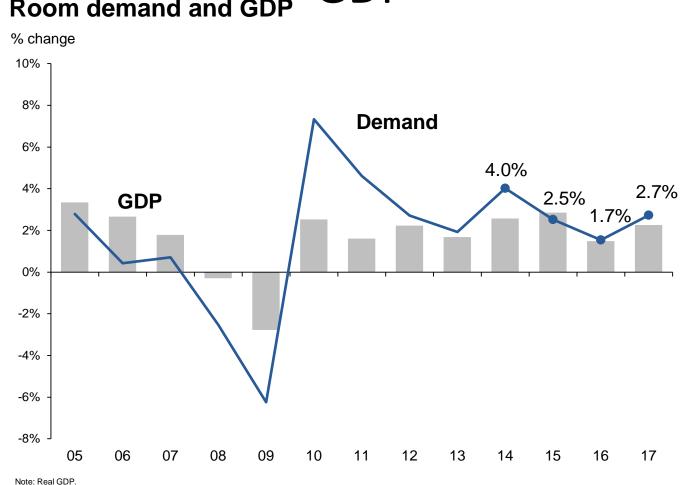


#### STATE OF NATIONAL TOURISM INDUSTRY LODGING HAS GAINED WALLET SHARE **Growth 2011 to February 2018** Index (Dec. 2011=100) Lodging (47.8%) 150 140 ■ F&B (34.7%) ■ Air (31.4%) 130 ■ Recreation services (29.0%) **■ Consumer spending (27.2%)** 120 110 ■ Motor vehicle fuel (-14.5%) 80 **CONSUMER** 2018 2011 2012 2013 2014 2015 2016 SPENDING, U.S. Note: Data is nominal, three-month moving average, seasonally adjusted and extends through February 2018. Source: Bureau of Economic Analysis; Tourism Economics



#### STATE OF NATIONAL TOURISM INDUSTRY TRAVEL SECTORS LED JOB GROWTH IN 98/100 TOP US CITIES US, trailing twelve months, index (2008=100) **HOTEL ROOM DEMAND BY SEGMENT Transient** 140 +40.1% since 2008 130 120 110 100 Group -10.2% since 2008 80 Note: Data through January 2018. Source: STR **Tourism Economics**

# Demand has settled into strong correlation with Room demand and GDP GDP

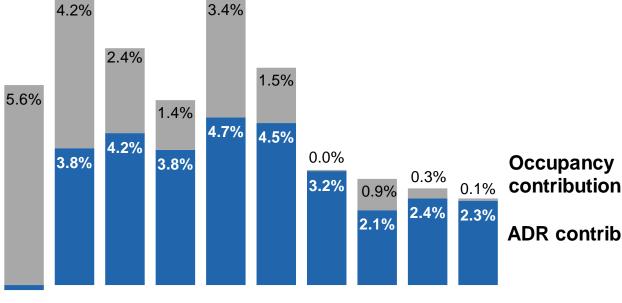


Source: STR; BEA; Tourism Economics

# ADR contribution to RevPAR growth

#### Occupancy and ADR growth

% change



STR and TE partner to publish a US lodging forecast

#### RevPAR

(Jan-2018 release):

- 2017: 3.0%
- 2018: 2.7%
- 2019: 2.4%

**ADR** contribution

14 15 16



# Tourism Economics' Key Takeaways

Improved economy to boost demand	Risks are real but not high probability	Supply increases present challenges to rate	Demand will match supply increases
Demand gains through 2018 and 2019. Business and group travel to show life.	Watch for policy mis-steps, wage stagnation, and interest rates.	Despite high occupancies, rate gains will remain modest.	International visitors, groups, vacation trends, and demographics paint a positive picture.





IMPACT OF TOURISM IN SLO CAL

# 2017 GUEST SPENDING

\$1.75 BILLION IN GUEST SPENDING
BY SECTOR









# 2017 GUEST SPENDING

# 2017 SLO CAL GUESTS SPEND BY ACCOMMODATION TYPE





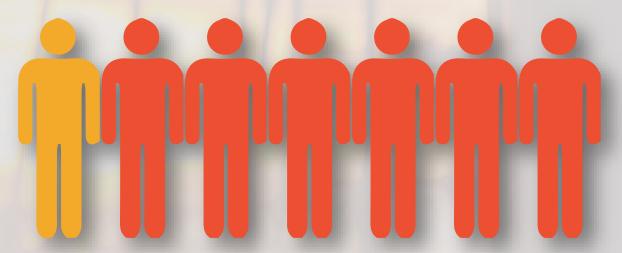






# IMPACT OF TOURISM IN SLO CAL 2017 TOURISM IN SLO CAL

1 OUT OF 7 SLO COUNTY JOBS DEPEND ON TOURISM



**20,250 TOTAL JOBS** 

IMPACT OF TOURISM IN SLO CAL 2017 GUEST SPENDING

# SLO CAL GUESTS SPEND AN AVERAGE OF

A DAY

54.8M 5200K AN HOUR

MIŃÙTE

IMPACT OF TOURISM IN SLO CAL

# 2017 GUEST TAX IMPACT

\$75.2 MILLION IN LOCAL TAX RECEIPTS
EQUATES TO



119
MILES OF 2-LANE
ROADS RESURFACED





IN SLO CAL







