



ECONOMIC DEVELOPMENT ECOSYSTEM



THANK YOU TO THE

BOARD OF DIRECTORS

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THANK YOU TO THE VISIT SLO CAL TEAM

Brooke Burnham, Vice President of Marketing
Michael Wambolt, Director of Travel Trade

Derek Kirk, Director of Community Engagement & Advocacy

Brendan Pringle, Operations Manager

Jordan Carson, Marketing & Brand Manager

Alessandra Casey, Partnership & Community Engagement Manager

Madison Quiring, Communications Manager

Haley Cahill, Marketing Coordinator

Haley Ramos, Office Coordinator

Vanessa Robbins, Digital Marketing Coordinator

Chuck Davison, President & CEO



















Trade Meetings



Representatives
Hosted



\$85MTotal Buying Power







DEMONSTRATE VALUE TO PARTNERS: STRATEGIC MARKETING

PAID MEDIA



SAMSUNG

SHARETHROUGH











Dallas - Fort Worth 29%

Los Angeles & San Francisco 33%

Phoenix & Las Vegas 16%

Seattle & Denver 22%







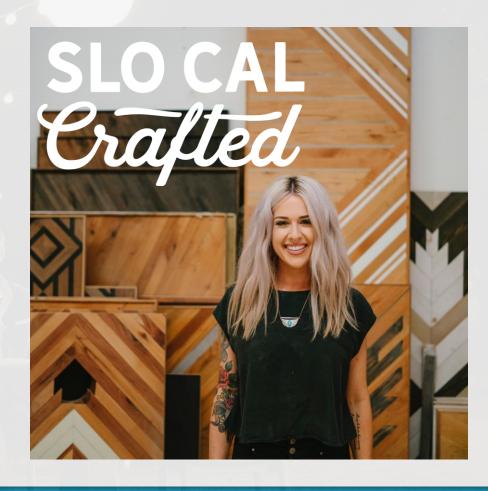


Media Spend by Market Sector

DEMONSTRATE VALUE TO PARTNERS: STRATEGIC MARKETING

OWNED MEDIA: LOCAL STORIES













DEMONSTRATE VALUE TO PARTNERS: STRATEGIC MARKETING

EARNED MEDIA



INTERNATIONAL



108
Journalists Hosted



262Media Articles



330M+
Total Circulation

DOMESTIC



31
Journalists Hosted



48Media Articles



173M+
Total Circulation

DEMONSTRATE VALUE TO PARTNERS: STRATEGIC MARKETING

SAVOR: A SAN LUIS OBISPO COUNTY EXPERIENCE



















BRAND DEVELOPMENT

CAMPAIGN RECOGNITION



Powered by U.S. Travel Association



DESTINATIONS COUNCIL

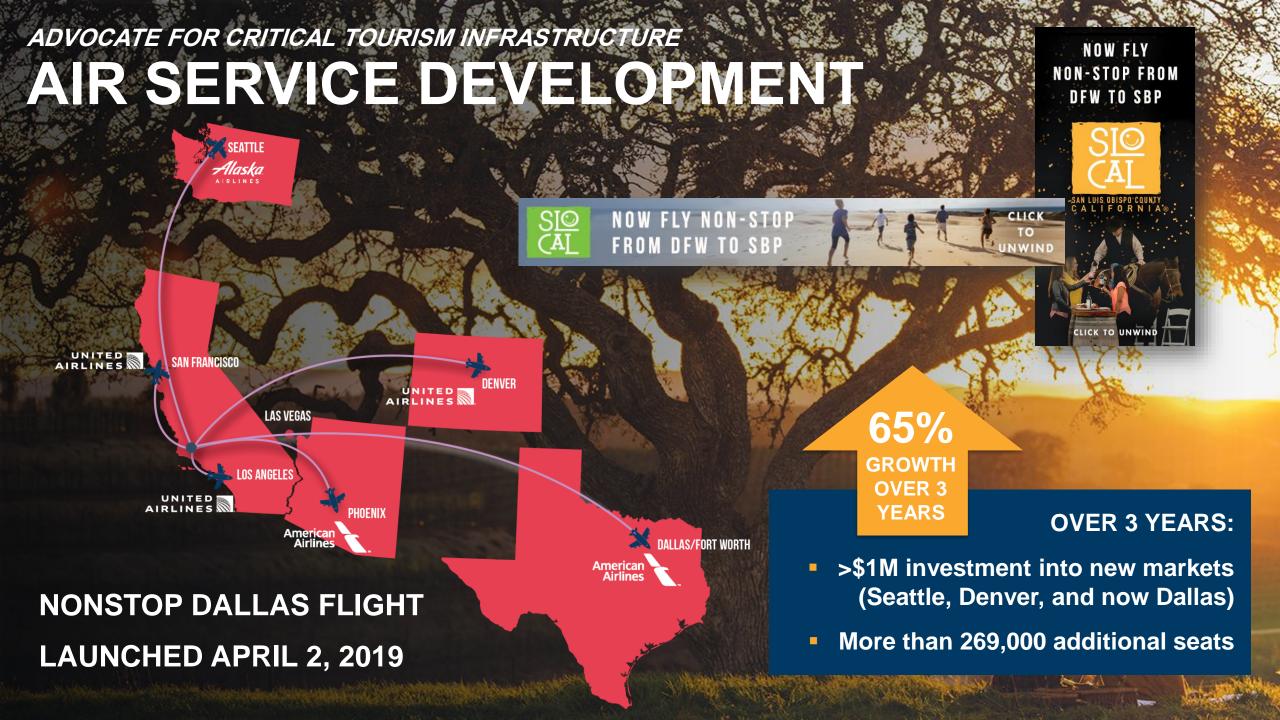
DESTINY AWARDS



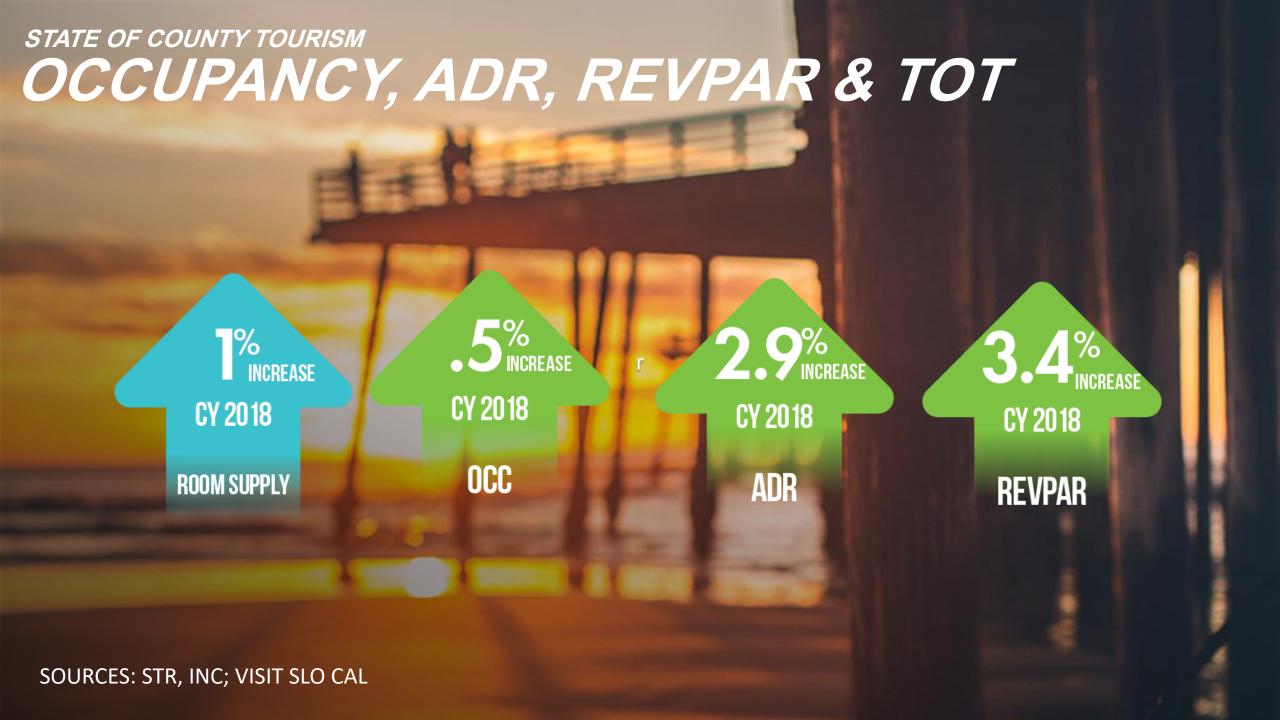
BEST DIGITAL CAMPAIGN FINALIST











STATE OF COUNTY TOURISM

2018 VISITOR SPENDING

\$1.81 BILLION IN VISITOR SPENDING BY SECTOR

\$513M FOOD SERVICE







SOURCE: DEAN RUNYAN

2018 VISITOR SPENDING

2018 SLO CAL VISITORS SPENT

BY ACCOMMODATION TYPE



\$48M



\$1.13B



\$152M



\$120M

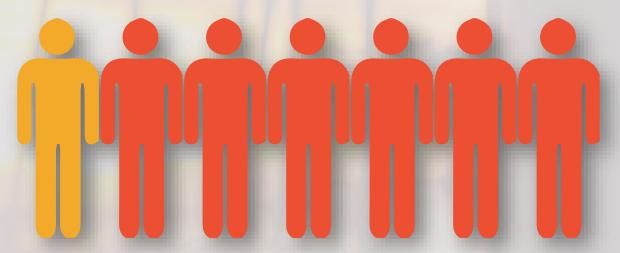


\$363M

SOURCE: DEAN RUNYAN

STATE OF COUNTY TOURISM
2018 VISITOR SPENDING

1 OUT OF 7 SLO COUNTY JOBS DEPEND ON TOURISM



20,680 TOTAL JOBS

SOURCE: DEAN RUNYAN, US CENSUS BUREAU

2018 VISITOR SPENDING

SLO CAL VISITORS SPENT AN AVERAGE OF

55.0M 5208K
ADAY AN HOUR

\$3.5K A MINUTE

458 A SECOND

SOURCE: DEAN RUNYAN

STATE OF COUNTY TOURISM

2018 VISITORS SPENDING

\$80.1 MILLION IN LOCAL TAX RECEIPTS EQUATES TO











IN SLO CAL



EQUIVALENT SPENDING BY HOUSEHOLD

WITHOUT TOURISTS, EACH SLO CAL HOUSEHOLD WOULD NEED TO SPEND



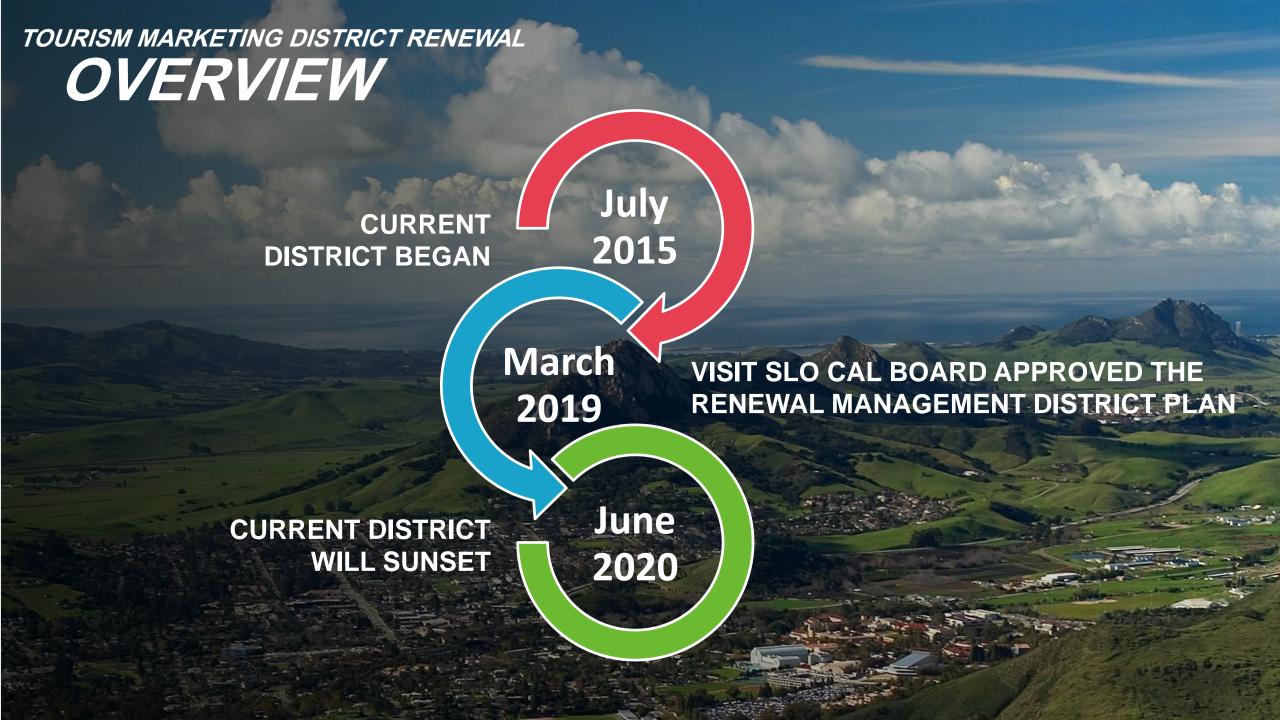
TO CREATE THE SAME ECONOMIC IMPACT

SOURCE: DEAN RUNYAN, US CENSUS BUREAU









TOURISM MARKETING DISTRICT RENEWAL ROI STUDY RESULTS

Destination	DMO Budget (M)	County Size (sq. miles)	Hotel Rooms	Accommodation Wages (M)	L&H** Employment
Newport Beach	\$9.5	*	3,351	*	*
Napa County	\$7.1	748	5,020	\$248	12,916
Monterey County	\$7.1	3,281	11,981	\$428	23,874
Santa Barbara	\$5.6	*	5,573	*	*
Sonoma County	\$5.5	1,576	6,609	\$184	24,409
Huntington Beach	\$5.0	*	2,343	*	*
SLO CAL	\$4.4	3,299	9,091	\$172	19,215
Stockton	\$1.4	*	2,704	*	*
Ventura	\$1.1	*	1,978	*	*

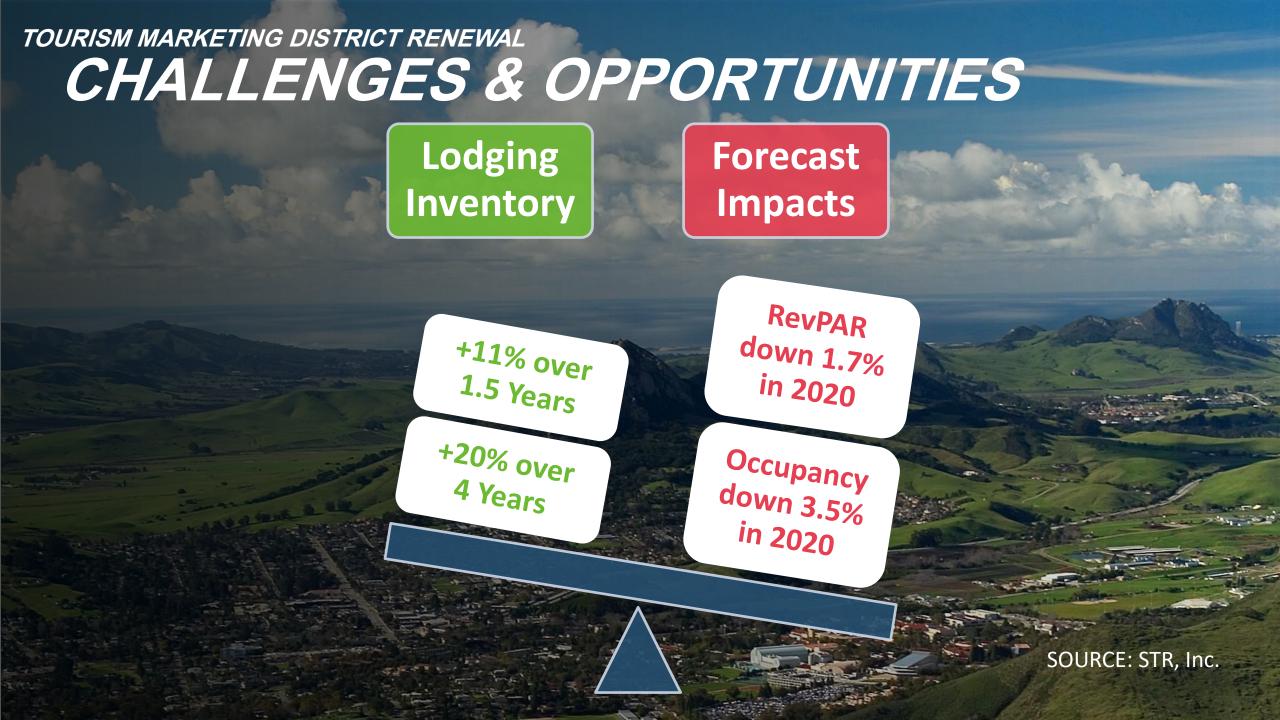
Sources: Destinations International (DI); U.S. Census Bureau; DMO websites; STR; BEA

Budget data is for most recently FY available, typically 2018, hotel rooms data is for 2018, economic data is for 2017



^{*}Economic data not available for sub-county level DMOs

^{**}Employment in the recreation, food services and accommodation sectors



CHALLENGES & OPPORTUNITIES

SAN FRANCISCO: 4.7M SEATTLE:

PHOENIX:

4.8M

TARGET MARKETS
INCLUDE 5 OF THE
TOP 15 MSAs IN U.S.

DENVER: 2.9M

3.9M

LOS ANGELES:

13.3M

DALLAS:

7.5M

SOURCE: US CENSUS BUREAU



TOURISM MARKETING DISTRICT RENEWAL

CHALLENGES & OPPORTUNITIES - DMS

Tourism Management

Talent Attraction & Development



Conference & Meeting Space

International Visitors

Air Service Development

Placemaking

TOURISM MARKETING DISTRICT RENEWAL KEY STRATEGIES



INCREASED ADVERTISING IN KEY DRIVE AND LONG-HAUL MARKETS



ELEVATION OF KEY SALES INITIATIVES AND EFFORTS



GROWTH OF INTERNATIONAL MARKETS



CONTINUED SUPPORT AND EXPANSION OF AIR SERVICE DEVELOPMENT



ADVANCEMENT OF DESTINATION MANAGEMENT STRATEGY RECOMMENDATIONS



5-YEAR TERM



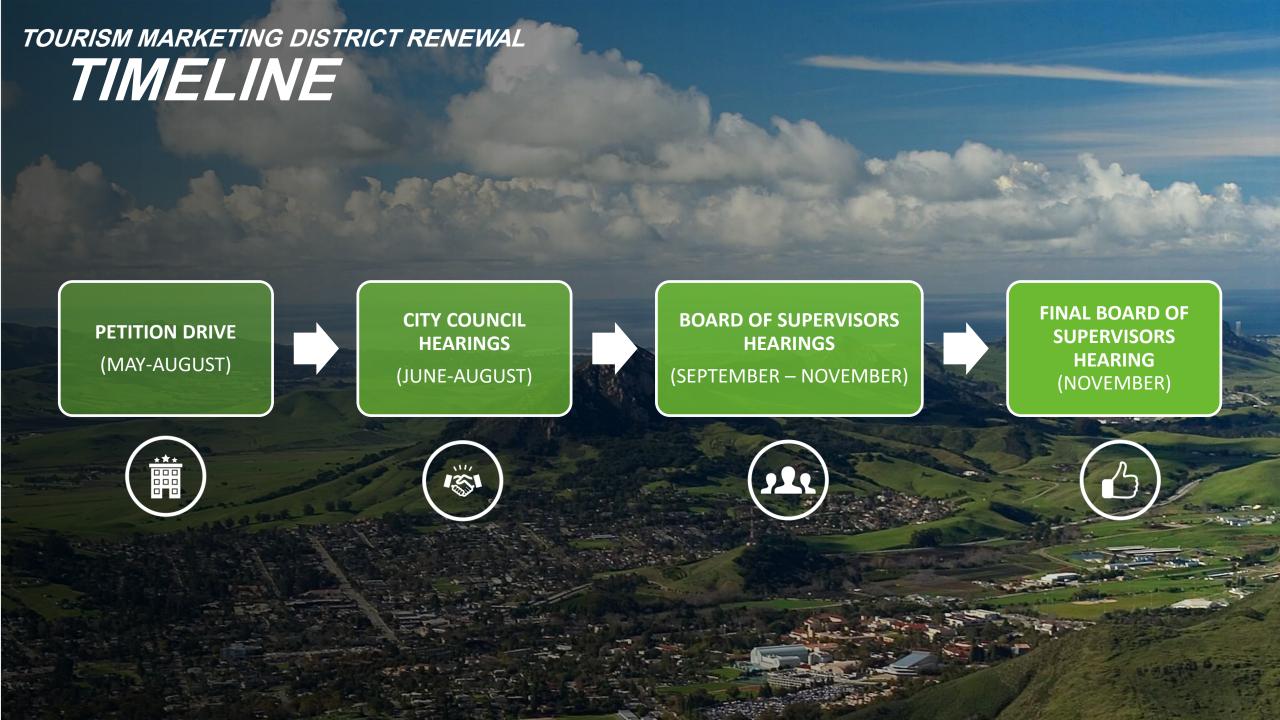
10-YEAR TERM

1% ASSESSMENT

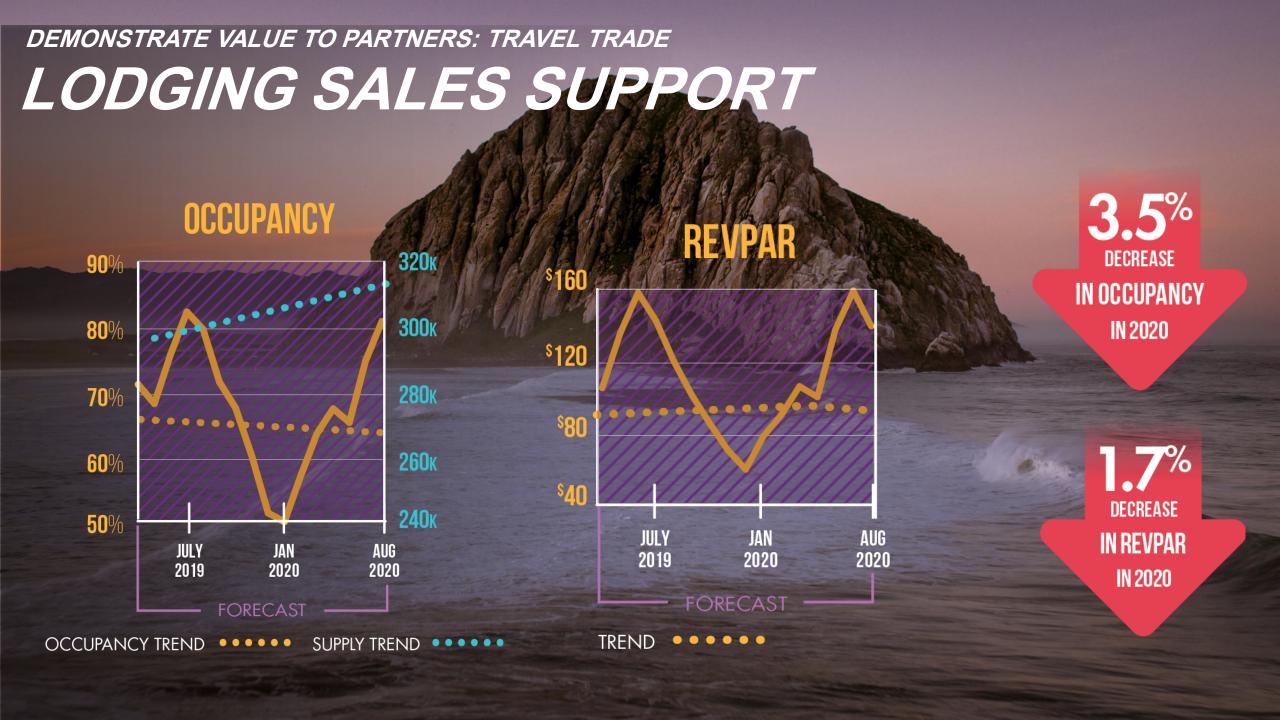


1.5% ASSESSMENT

OPPORTUNITIES FOR MORE LODGING REPRESENTATION ON THE VISIT SLO CAL BOARD









DEMONSTRATE VALUE TO PARTNERS: TRAVEL TRADE

INTERNATIONALMARKETS

SLO CAL'S TOP 5 INTERNATIONAL MARKETS BY SPEND











CA'S TOP 5 INTERNATIONAL MARKETS BY SPEND AMT











SOURCES: VISAVUE® TRAVEL, VISIT CALIFORNIA

DEMONSTRATE VALUE TO PARTNERS: ADVOCACY

STATE AND NATIONAL ADVOCACY

CALTRAVEL

Rally Days

US TRAVEL

Destination: Capitol Hill

IN-MARKET MEETINGS

U.S. TRAVEL

- Industry Advisory Group Meetings ASSOCIATION
 - Assemblyman Cunningham and US Representative Carbajal



BRAND DEVELOPMENT

FY 19/20 MARKETING INITIATIVES



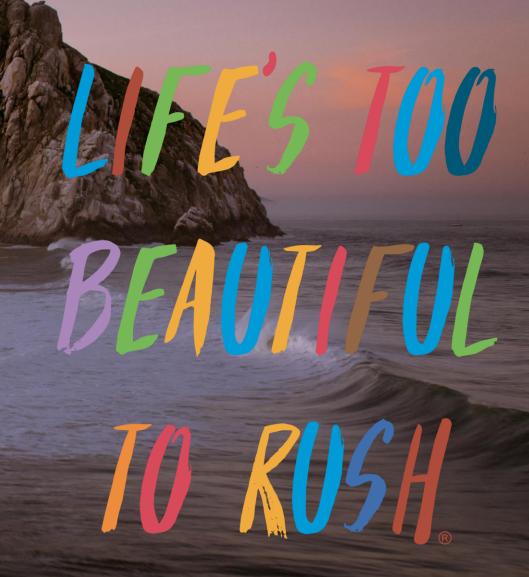
MOVE SAVOR TO NEW MARKETS



ANALYZE MARKET DATA FOR BETTER UNDERSTANDING OF VISITORS



FULLY IMPLEMENT & OPTIMIZE CURRENT PROGRAMS



DEMONSTRATE VALUE TO STAKEHOLDERS: STRATEGIC MARKETING

AMGEN TOUR OF CALIFORNIA







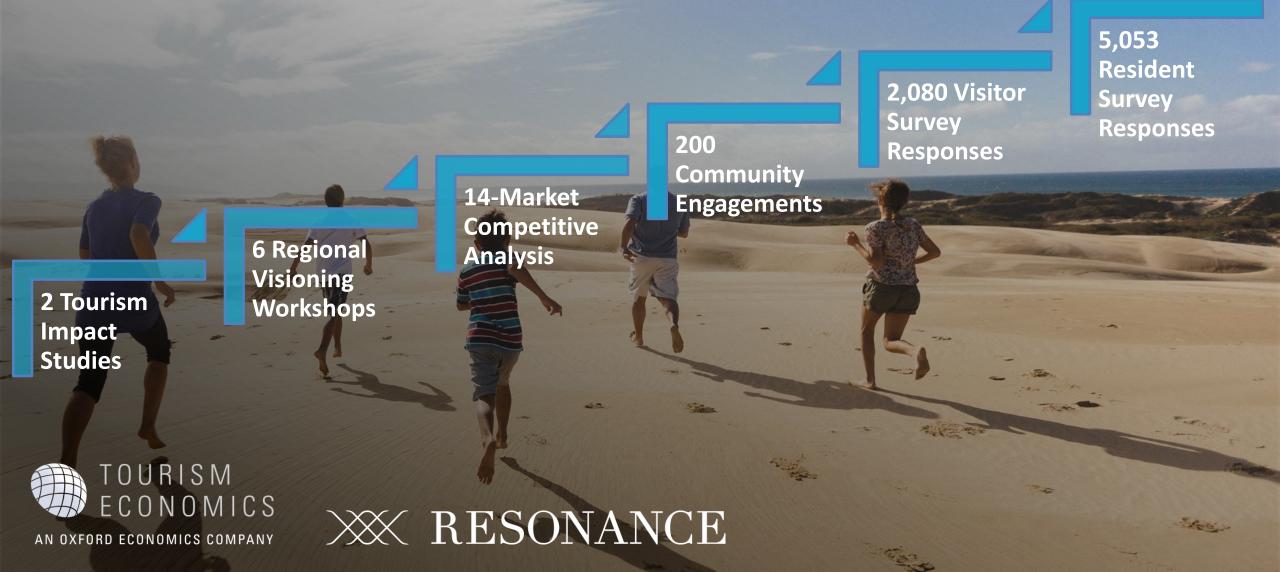
INFRASTRUCTURE: DESTINATION MANAGEMENT STRATEGY

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 (ret.) Thomas Frutchey, City Manager, City of Paso Robles Andrew Hackleman, VP of Strategy, Hourglass Project Melissa James, CEO, Hourglass Project 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 Christine Robertson, San Luis Coastal Education Foundation Pete Rodgers, Executive Director, San Luis Obispo Council of Governments Guy Savage, Assistant County Administrative Officer, County of San Luis Obispo

INFRASTRUCTURE: DESTINATION MANAGEMENT STRATEGY

13-MONTH PLANNING PROCESS



INFRASTRUCTURE: DESTINATION MANAGEMENT STRATEGY

THE PATH FORWARD

FOCUS AREAS





