Year in Review

FY 2017/18
Why Tourism Matters

Travel Spending

$1.75B

Up 4.3% over 2016

Visitor Spending by Accommodation Type

- Hotels and Motels: $1.05B
- Day Travel: $344M
- Campgrounds: $145M
- Private Homes: $98M
- Vacation Homes: $42M

Visitor Spending

$1.68B

Up 3.9% over 2016

Direct Spending from Each Sector

- Food Service: $482M
- Accommodations: $467M
- Retail: $254M
- Arts, entertainment & Recreation: $210M

Direct Spending by Domestic and International Travelers Averaged:

- $4.8M a day
- $200K an hour
- $3.3K a minute
- $56 a second

83% of Travel Companies are Considered Small Businesses

1 out of 7 SLO County Jobs Depend on Travel and Tourism

20,250 Total Jobs

$645M in Industry Earnings

Source: Dean Runyan
**Imperative: Demonstrate Value to Our Stakeholders, Partners and Communities**

- **Local Tax Revenue:** $75.2M
  - Which could cover expenses for:
    - 751 Police Officers’ Salaries
    - 120 Miles of 2-lane resurfaced roads
    - 1,018 Firefighters’ salaries
    - 104 Parks

**Visitor Tax Receipts vs. Business Tax Receipts**

**$56M** vs. **$19M**

**Imperative: Optimize Our Organizational Capacity**

**Visit SLO CAL Budget**

$3,858,457

(Includes Accumulated Reserve)

**Police Officers’ Salaries**

$751

**Firefighters’ Salaries**

$1,018

**2015**

- **TOT** $35,157,813

**2016**

- **TOT** $37,213,263

**2017**

- **TOT** $38,205,295

**OCC**

- **2015** 70.7%

- **2016** 69.5%

- **2017** 68.3%

**ADR**

- **2015** $140.37

- **2016** $148.27

- **2017** $150.48

**Rev Par**

- **2015** $99.29

- **2016** $103.06

- **2017** $102.73

**Note:** These figures reflect the impact in visitation due to the Highway 1 closure.

Sources: Dean Runyan, U.S. Census Bureau, Labor Statistics

Without the tax revenue generated by travel and tourism:

- Local tax revenue $56M

Each SLO CAL household would pay an additional $720 in taxes without the tax revenue generated by travel and tourism.

Source: Visit SLO CAL Budget

Source: STR, INC

Source: STR, INC

Source: STR, INC

Source: STR, INC
NEW WEBSITE: SLOCAL.COM

YOY CHANGE IN WEBSITE METRICS

- **Sessions**: +27.3%
- **Users**: +35.9%
- **Pageviews**: +19.6%
- **Avg. Session Duration**: +7.0%
- **Bounce Rate**: -6.8%

NOTE: figures from April 2017 to March 2018

SOCIAL MEDIA

- @SLOCAL
- 32K FOLLOWERS
- 54% increase YOY

- @SLOCAL
- 19.5K FOLLOWERS
- 56% increase YOY

NOTE: figures as of March, 2018

PUBLIC RELATIONS

- New National PR Agency TURNER
- 136 Media Articles
- 65 Media Professionals hosted
- Visit California Visits & Events
- 118M U.S. Press Circulation
- 55M U.K. (BlackDiamond) Press Circulation

ADVERTISING

- Channels: 23% DISPLAY | 11% MOBILE | 31% SEM
- 25% SOCIAL | 10% VIDEO

- Total Media Buy: $1.2M
- 25.3% LOS ANGELES
- 14.8% DENVER
- 25.3% SAN FRANCISCO
- 5.0% LAS VEGAS
- 14.8% SEATTLE
- 14.8% PHOENIX

NOTE: projected allocation, final figures may vary

IMPERATIVE: BUILD AND EXPAND STRATEGIC PARTNERSHIPS

CO-OP MEDIA

- $170K Joint Campaign Spend
- 5 DMO Partners
- Social & Native Advertising

Imperative: Establish brand clarity and increased awareness through unified efforts

Year in Review

WAVE 2 VS WAVE 1 BRAND LIFT

Brand Lift Study Wave 2
1,838 Completed surveys

Familiarity with SLO CAL
39% have visited
61% have not visited

AD EFFECTIVENESS

Somewhat likely or very likely to visit SLO CAL in the next 24 months
Pre-exposure: 77%
Post-exposure: 85%
Increase: +8%

WAVE 2 VS. WAVE 1 BRAND LIFT

Claim to have seen ads about SLO CAL in the past 6 months: 29% vs 25% (+4pp)
Visited and would visit again: 92% vs 90% (+2pp)
Have not visited but interested: 68% vs 66% (+2pp)

Travel Trade

8 FAMs - 44 attendees
5 Tradeshows - 89 Leads - 58 Prospects
4 Sales Missions - 7 Cities - 8 Agency trainings - 66 Leads - 50 Prospects

Imperative: Establish brand clarity and increased awareness through united efforts

Destination Management Strategy

Goal: To outline the evolution, marketing and management of our destination 20-30 years into the future

Air Service Support

225+ new seats added
23% growth YOY

Additional daily Denver flight + enhanced capacity on existing flights

$250K Investment
9-12 month process

805.541.8000 • SLOCAL.COM
**2017 VISAVUE DOMESTIC TOURISM REPORT**

**TOTAL SPEND**

$654,166,316

- **Consumer** $596,238,220
- **Commercial** $57,928,096
- **YOY Change** 10.4%

**TRANSACTION COUNT**

13,499,678

- **Consumer** 12,734,094
- **Commercial** 765,584
- **YOY Change** 7.9%

**Top Originating MSAs by Spend Amount (SM)**

**Top Originating MSAs YOY $ Growth (%)**

<table>
<thead>
<tr>
<th>MSA</th>
<th>YOY $ Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>LA</td>
<td>10.4%</td>
</tr>
<tr>
<td>SB</td>
<td>10.4%</td>
</tr>
<tr>
<td>SF</td>
<td>10.4%</td>
</tr>
<tr>
<td>FR</td>
<td>10.4%</td>
</tr>
<tr>
<td>BF</td>
<td>10.4%</td>
</tr>
<tr>
<td>SD</td>
<td>10.4%</td>
</tr>
<tr>
<td>SAC</td>
<td>10.4%</td>
</tr>
<tr>
<td>Vis</td>
<td>10.4%</td>
</tr>
<tr>
<td>Sal</td>
<td>10.4%</td>
</tr>
<tr>
<td>Sea</td>
<td>10.4%</td>
</tr>
</tbody>
</table>

**Top Originating MSAs**

- LA = LA/Orange County/Riverside
- SB = Santa Barbara/Santa Maria
- SF = San Francisco/Oakland/San Jose
- FR = Fresno
- BF = Bakersfield
- SD = San Diego
- SAC = Sacramento/Yolo
- Vis = Visalia/Tul./P. Ville
- Sal = Salinas
- Sea = Seattle/Tac/Brem.

**Top Originating Countries by Spend Amount (SM)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Spend Amount (SM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>$596,238,220</td>
</tr>
<tr>
<td>DE</td>
<td>$1,131,558</td>
</tr>
<tr>
<td>CN</td>
<td>$17,521,357</td>
</tr>
<tr>
<td>UK</td>
<td>$18,652,915</td>
</tr>
<tr>
<td>FR</td>
<td>$654,166,316</td>
</tr>
<tr>
<td>AU</td>
<td>$1,571,558</td>
</tr>
<tr>
<td>ES</td>
<td>$123,456,789</td>
</tr>
<tr>
<td>DK</td>
<td>$12,345,678</td>
</tr>
</tbody>
</table>

**Top Market Segments by Spend Amount (SM)**

- Lodging
- Restaurants
- Supermarkets
- Discount Stores
- Other Retail
- Misc. Specialty Retail
- QSR
- Other Travel Entertainment
- Radio & TV
- Jewelry & Other Stores

**TOTAL SPEND**

$18,652,915

- **Consumer** $17,521,357
- **Commercial** $1,131,558
- **YOY Change** -9.6%

**TRANSACTION COUNT**

243,088

- **Consumer** 234,677
- **Commercial** 8,411
- **YOY Change** -3.2%

**Source:** VVT/Visa

---

**IMPERATIVE: ADVOCATE FOR THE DEVELOPMENT OF CRITICAL TOURISM INFRASTRUCTURE**