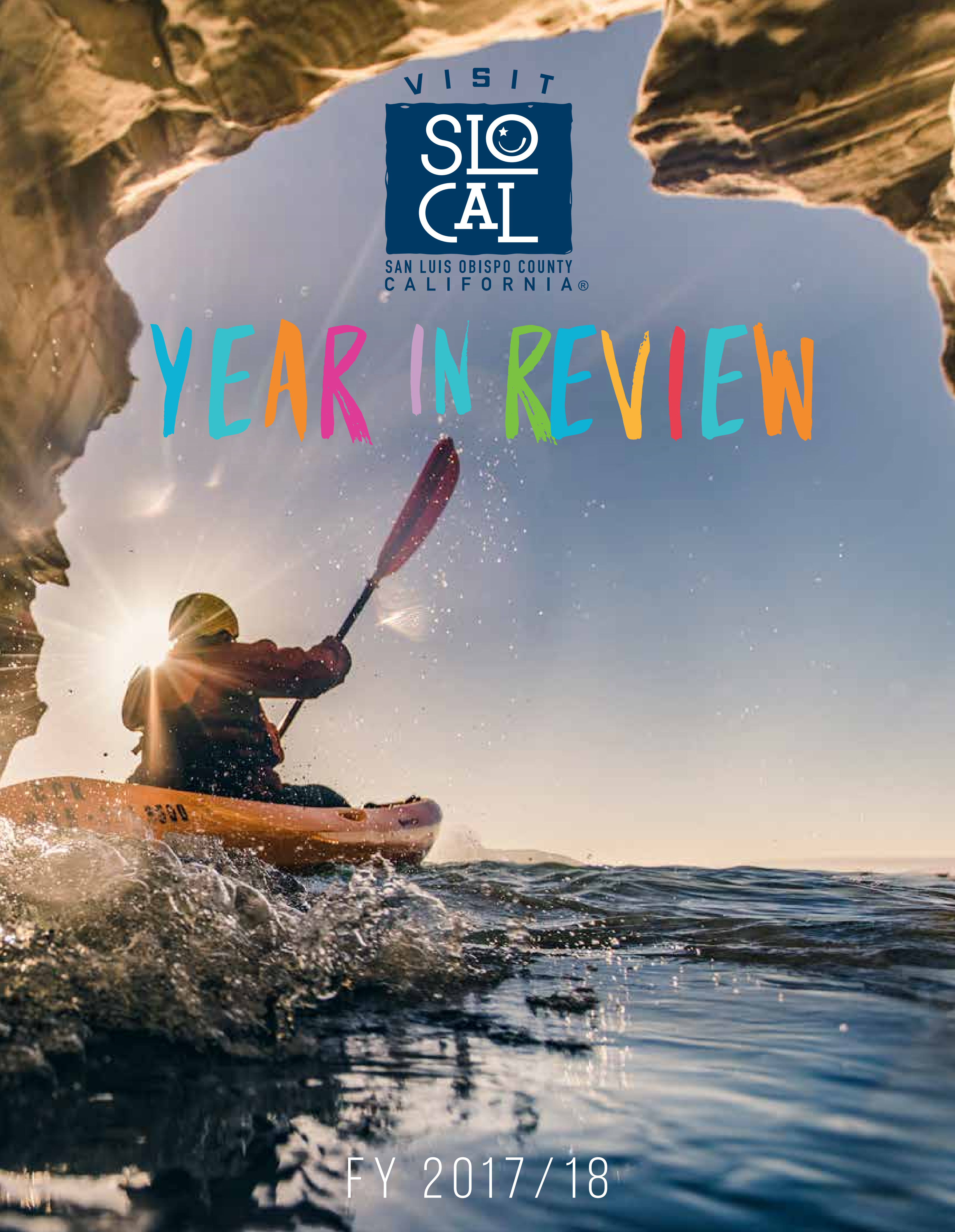


VISIT SLO CAL
SAN LUIS OBISPO COUNTY CALIFORNIA®

YEAR IN REVIEW

FY 2017/18

IMPERATIVE: DEMONSTRATE VALUE TO OUR STAKEHOLDERS, PARTNERS AND COMMUNITIES

WHY TOURISM MATTERS

TRAVEL SPENDING

$1.75B

UP 4.3% OVER 2016

DIRECT SPENDING FROM EACH SECTOR

Food service	Accommodations	Retail	Arts, entertainment & Recreation
$482M	$467M	$254M	$210M

VISITOR SPENDING

$1.68B

UP 3.9% OVER 2016

VISITOR SPENDING BY ACCOMMODATION TYPE

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

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

Source: US Travel Association

1 OUT OF 7 SLO COUNTY JOBS DEPEND ON TRAVEL AND TOURISM

Source:California Economic Development Department

	Accommodations & Food Service	Arts, Entertainment & Recreation	Retail	Ground Transportation	Visitor Air Transportation	Other Travel
20,250 TOTAL JOBS	12,400 JOBS	5,620 JOBS	1,520 JOBS	480 JOBS	70 JOBS	160 JOBS
$645M IN INDUSTRY EARNINGS	$433M	$123M	$52M	$23M	$5M	$9M

Source: Dean Runyan

IMPERATIVE: DEMONSTRATE VALUE TO OUR STAKEHOLDERS, PARTNERS AND COMMUNITIES

IMPERATIVE: OPTIMIZE OUR ORGANIZATIONAL CAPACITY

LOCAL TAX REVENUE $75.2M

WHICH COULD COVER EXPENSES FOR:

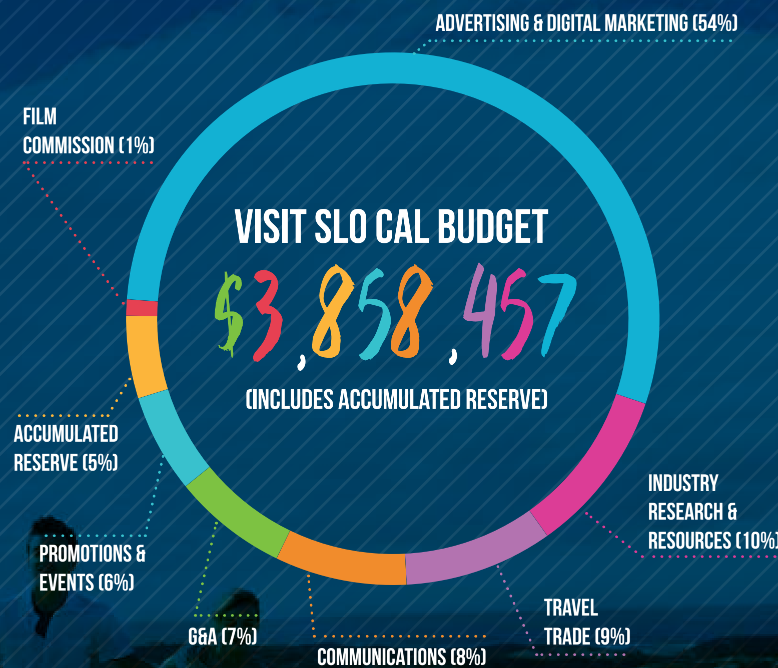
- **751** Police Officers' Salaries
- **120** Miles of 2-lane resurfaced roads
- **1,018** Firefighters' salaries
- **104** Parks

Sources:DeanRunyan,BureauofLaborStatistics

EACH SLO CAL HOUSEHOLD WOULD PAY AN ADDITIONAL $720.28 IN TAXES WITHOUT THE TAX REVENUE GENERATED BY TRAVEL AND TOURISM

Sources:DeanRunyan,U.S.CensusBureau

VISITOR TAX RECEIPTS **$56M** VS. BUSINESS TAX RECEIPTS **$19M**



IMPERATIVE: DEMONSTRATE VALUE TO OUR STAKEHOLDERS, PARTNERS AND COMMUNITIES

	2015	2016*	2017*	
TOT	$35,157,813	$37,213,263	$38,205,295	UP 8.7% 2015-17 (Source:VisitSLOCAL)
OCC	70.7%	69.5%	68.3%	2.3% INCREASE IN ROOM INVENTORY 2015-17 (Source: STR, INC)
ADR	$140.37	$148.27	$150.48	UP 7.2% 2015-17 (Source: STR, INC)
REV PAR	$99.29	$103.06	$102.73	UP 3.5% 2015-17 (Source: STR, INC)

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

IMPERATIVE: ESTABLISH BRAND CLARITY AND INCREASED AWARENESS THROUGH UNIFIED EFFORTS

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 — 32KFOLLOWERS, 54% increase YOY

@SLOCAL — 19.5KFOLLOWERS, 56% increase YOY

NOTE: figures as of March, 2018

PUBLIC RELATIONS

- New National PR Agency TURNER PR
- 136 Media Articles
- 65 Media Professionals hosted
- 8 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

visit California

Poppy Award for Best Digital Marketing Campaign

CO-OP MEDIA

$170K JOINT CAMPAIGN SPEND

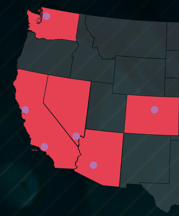
5 DMO PARTNERS

SOCIAL & NATIVE ADVERTISING

IMPERATIVE: ESTABLISH BRAND CLARITY AND INCREASED AWARENESS THROUGH UNITED EFFORTS

BRAND AWARENESS

6 MARKETS



BRAND LIFT STUDY WAVE 2

1,838

Completedsurveys

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	POST-EXPOSURE	
77%	85%	+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

3 CONSUMER EVENTS

	REACH
RVIA	38,000
SAVOR	12,000

IMPERATIVE: ADVOCATE FOR THE DEVELOPMENT OF CRITICAL TOURISM INFRASTRUCTURE

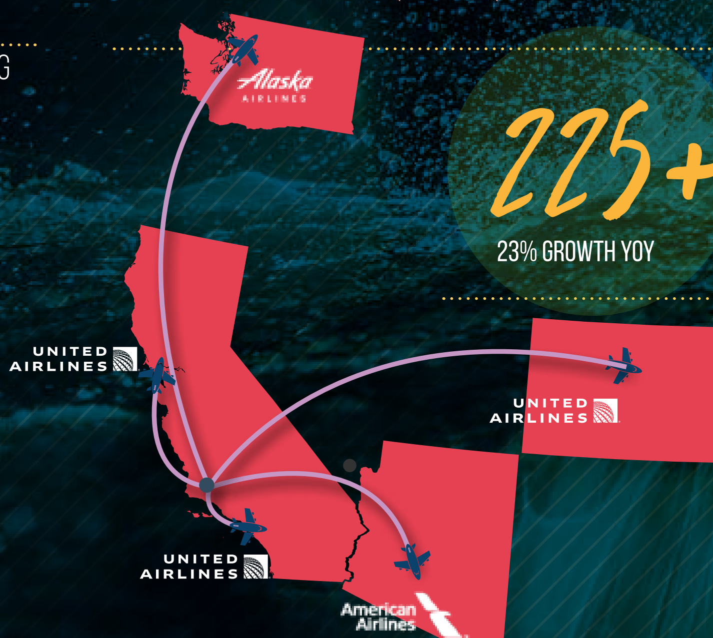
DESTINATION MANAGEMENT STRATEGY

GOAL: TO OUTLINE THE EVOLUTION, MARKETING AND MANAGEMENT OF OUR DESTINATION **20-30 YEARS** INTO THE FUTURE

$250K INVESTMENT

9-12 MONTH PROCESS

AIR SERVICE SUPPORT



225+ NEW SEATS ADDED

23% GROWTH YOY

ADDITIONAL DAILY DENVER FLIGHT
+
ENHANCED CAPACITY ON EXISTING FLIGHTS

IMPERATIVE: ADVOCATE FOR THE DEVELOPMENT OF CRITICAL TOURISM INFRASTRUCTURE

2017 VISAVUE DOMESTIC TOURISM REPORT

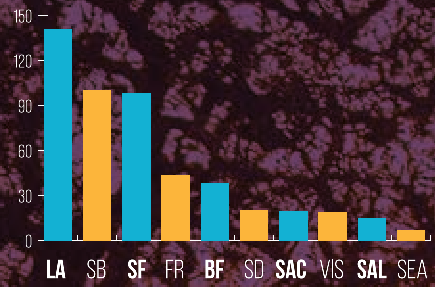
TOTAL SPEND
$654,166,316

CONSUMER	COMMERCIAL	YOY CHANGE
$596,238,220	$ 57,928,096	10.4%

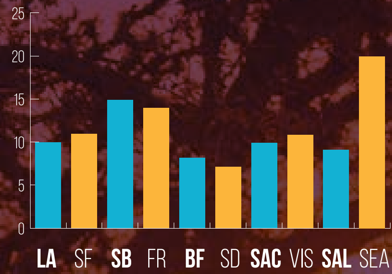
TRANSACTION COUNT
13,499,678

CONSUMER	COMMERCIAL	YOY CHANGE
12,734,094	765,584	7.9%

TOP ORIGINATING MSAs BY SPEND AMOUNT ($M)



TOP ORIGINATING MSAs YOY $ GROWTH (PERCENTS)



KEY

- 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.

Source: VVT/Visa

2017 VISAVUE INTERNATIONAL TOURISM REPORT

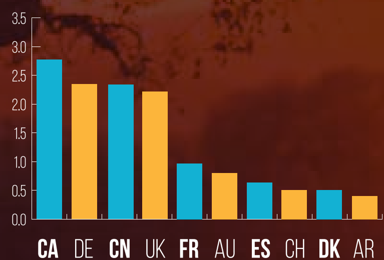
TOTAL SPEND
$18,652,915

CONSUMER	COMMERCIAL	YOY CHANGE
$17,521,357	$1,131,558	-9.6%

TRANSACTION COUNT
243,088

CONSUMER	COMMERCIAL	YOY CHANGE
234,677	8,411	-3.2%

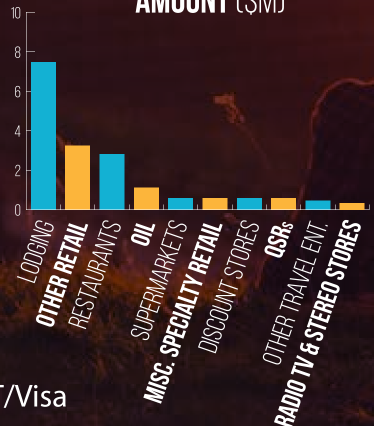
TOP ORIGINATING COUNTRIES BY SPEND AMOUNT ($M)



KEY

- CA = CANADA
- DE = GERMANY
- CN = CHINA
- UK = UNITED KINGDOM
- FR = FRANCE
- AU = AUSTRALIA
- ES = SPAIN
- CH = SWITZERLAND
- DK = DENMARK
- AR = ARGENTINA

TOP MARKET SEGMENTS BY SPEND AMOUNT ($M)



Source: VVT/Visa