Visit SLO CAL has a three-year track record of success on behalf of our lodging investors and the tourism community. We need your support to see the district renewed. Over the next few pages we’ve outlined some of our key successes and the return on investment that Visit SLO CAL brings. As we approach the “vote” we need your support to renew the Tourism Marketing District.
STRATEGIC DIRECTION 2020

- Optimize our organizational capacity
- Establish brand clarity and increased awareness through unified efforts
- Build and expand strategic partnerships
- Advocate for the development of critical tourism infrastructure
- Demonstrate value to our stakeholders, partners and communities

Imperative: Establish brand clarity and increased awareness through unified efforts

Brand Research

Visit SLO CAL funded a first-of-its-kind research co-op for the county to inform the development of a new brand and future marketing campaigns.

Low awareness // average 70%
High propensity to visit & spend

Average visitor spend in SLO CAL $2,100

Target Personas
- Mom to the Max
- Active Adventurer
- Cultured Class

New SLO CAL Brand

Lifes too beautiful to rush

Launched January 2017

Target Markets
- San Francisco
- Los Angeles
- Las Vegas
- Phoenix
- Seattle
- Denver
BRAND ADVERTISING

Spend: $3.3M
Clicks: 2,662,381
Impressions: 651,531,783

ORGANIC SESSIONS

TOTAL SESSIONS BY MARKET

Crisis Response

- Crisis Communication Plan Created (September 2015)
- Chimney Fire (August - September 2016)
- Highway 1 Closure (November 2016)
- Thomas Fire (December 2017)
- Highway 1 Dream Drive & Re-Opening (July 2018)

Supporting Our Local Partners

Co-op Ad Programs

- 9 Programs
- 44 Partnerships
- $642,417 Spend
- 75,990,979 Impressions

Circulation: 180,000
Partner Ads: 163

Property Visits: 224
Visitor Center Visits: 24
Co-op Spend: $86k
Internationally-Translated Detour Maps: 6

*Metrics reflect data through March 2019

NEW SLOCAL.COM
**Public Relations**

- 1,166 Meetings
- 710 Articles
- 679M Impressions
- $8M Ad Equivalency
- 308 Fam Attendees
- 16 Countries - Exposure

**Travel Trade**

- 26 Trade Shows
- 796 Appointments
- 16 Missions
- $400M Buying Power
- 165 Fam Attendees
- 6 Countries

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**Imperative: Build and Expand Strategic Partnerships**

**Public Relations**

**Imperative: Establish Brand Clarity and Increased Awareness Through Unified Efforts**

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*Metrics reflect data through March 2019. AMGEN metrics reflect data through May 2019.*
BRAND LIFT

Research Now measures the consumer-brand interaction post marketing campaign and helps identify favorable changes in the customer journey.

- **38%** HAVE VISITED SLO CAL IN THE PAST
- **93%** WOULD VISIT AGAIN
- **45%** VERY LIKELY
- **38%** SOMEWHAT LIKELY
- **5%** VERY UNLIKELY
- **12%** SOMEWHAT UNLIKELY

**SOURCE:** RESEARCH NOW

*Wave 1 was conducted February 2017; Wave 3 was conducted August 2018

TRACKED ARRIVALS

**COLORADO // 3%**
**WASHINGTON // 5%**
**NEVADA // 2%**
**TEXAS // 1%**
**ARIZONA // 5%**
**CALIFORNIA // 80%**

**OTHER // 4%**

**SOURCE:** ARRIVALIST

**SOURCE:** ARRIVALIST

**IMPERATIVE: ESTABLISH BRAND CLARITY AND INCREASED AWARENESS THROUGH UNIFIED EFFORTS**

AIR SERVICE

- **65% GROWTH**
- **270K ADDITIONAL SEATS IN 3 YEARS**
- **$1M IN AIR SERVICE MARKETING SUPPORT**

**SOURCE:** VOLAIRE

**CONFERENCE CENTER**

- **FEASIBILITY STUDY**
- **15-20,000 SQ FT BALLROOM DESIRED**
- **81% WOULD BOOK IN SLO CAL IF NEW FACILITY WAS BUILT**
- **79% ARE LIKELY TO RETURN IF NEW FACILITY WAS BUILT**
- MID-WEEK & SHOULDER SEASON SHOW HIGHEST POTENTIAL

**SOURCE:** VOLAIRE

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

*Wave 1 was conducted February 2017; Wave 3 was conducted August 2018*

****Metrics reflect data through March 2019**
IMPRESSIVE: DEMONSTRATE VALUE TO OUR STAKEHOLDERS, PARTNERS AND COMMUNITIES

VISITOR VOLUME

2014: 6.8M
2015: 7.0M
2016: 7.0M
2017: 7.2M
2018: 7.5M

GROWTH: 10.2%
SOURCE: Tourism Economics

VISITAVUE® TRAVEL

DOMESTIC

TOP ORIGINATING METROPOLITAN STATISTICAL AREA (MSA) BY SPEND AMOUNT ($M)

LA: 118.8M
LA: 117.9M
LA: 114.2M
LA: 114.7M
LA: 110.2M
LA: 107.2M

TOTAL SPEND: $2,472,408,491
CARDHOLDER COUNT: 11,844,118

32% INCREASE OVER 4 YEARS
20% INCREASE OVER 4 YEARS

MSA KEY
LA = LA/ORANGE COUNTY/RIVERSIDE
SF = SAN FRANCISCO/OAKLAND/SAN JOSE
SB = SANTA BARBARA/SANTA MARIA
FR = FRESNO
BF = BAKERSFIELD
SD = SAN DIEGO

INTERNATIONAL

TOP ORIGINATING COUNTRIES BY SPEND AMOUNT ($M)

CN: 2.9M
CN: 2.4M
CN: 2.6M
CN: 3.0M
CN: 3.7M
CN: 4.2M

TOTAL SPEND: $78,987,990
CARDHOLDER COUNT: 517,929

1% INCREASE OVER 4 YEARS
11% INCREASE OVER 4 YEARS

COUNTRY KEY
CN = CHINA
UK = UNITED KINGDOM
CA = CANADA
DE = GERMANY
FR = FRANCE
AU = AUSTRALIA

SOURCE: VVT/Visa
*These figures reflect the impact in visitation due to the Highway 1 closure.

VISITOR SPENDING

LODGING: $1.9 BILLION
OTHER: $4.8 BILLION

$6.7 BILLION
2015-2018
SOURCE: Tourism Economics
DEAN RUNYAN, INC.
HOTEL OCCUPANCY (OCC)

Average Daily Rate (ADR)

Revenue Per Available Room (RevPar)

Transient Occupancy Tax (TOT)

Sources: STR, Inc.; Visit SLO Cal

*These figures reflect the impact in visitation due to the Highway 1 closure.
**DESTINATION MANAGEMENT STRATEGY**

**GOAL:** Outline the evolution, marketing and management of our destination 20-30 years into the future

- Protect our quality of life
- Enhance Slo Cal as a place to live, work and visit
- Responsibly steward our local resources

200 in-person stakeholder interviews | 2,080 visitor survey responses | 5,053 resident survey responses

8 focus areas and 28 recommendations
Final strategy to be delivered summer 2019

**IMPERATIVE: OPTIMIZE OUR ORGANIZATIONAL CAPACITY**

**TOTAL EXPENDITURES**

<table>
<thead>
<tr>
<th>FY 15/16</th>
<th>FY 16/17</th>
<th>FY 17/18</th>
<th>FY 18/19</th>
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</thead>
<tbody>
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<td>$1.84M</td>
<td>$3.03M</td>
<td>$2.80M</td>
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78% of total dollars spent on marketing, sales and public relations over 4 years

$10,723,473