



# TOURISM MARKETING DISTRICT RESULTS TO DATE

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

## TOURISM ECOSYSTEM



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



LAUNCHED JANUARY 2017



SOURCE: MERRILL RESEARCH

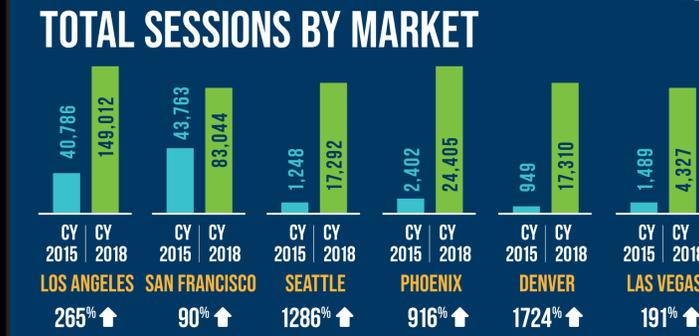
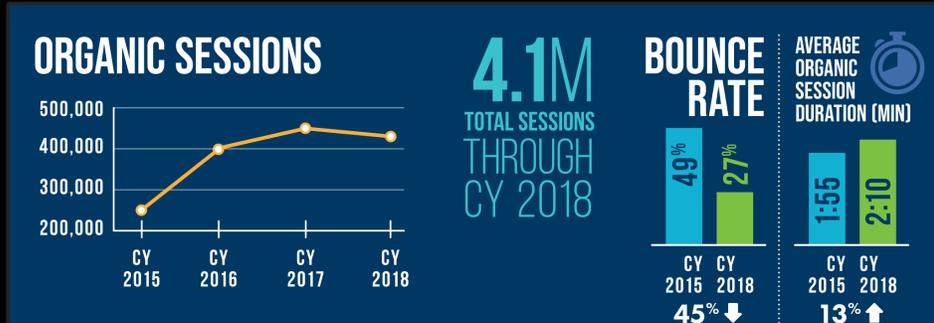
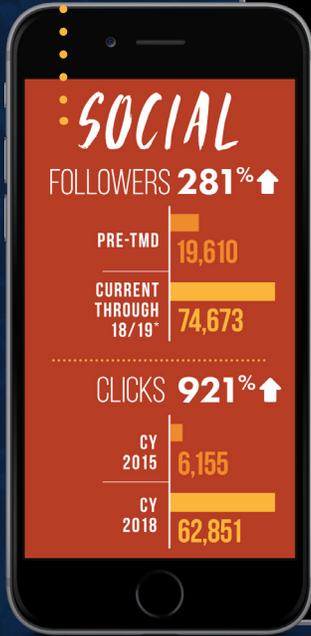
IMPERATIVE: ESTABLISH BRAND CLARITY AND INCREASED AWARENESS THROUGH UNIFIED EFFORTS

# BRAND ADVERTISING

**SPEND \$3.3M**

**CLICKS 2,662,381**

**IMPRESSIONS 651,531,783\***



IMPERATIVE: DEMONSTRATE VALUE TO OUR STAKEHOLDERS, PARTNERS AND COMMUNITIES

# SUPPORTING OUR LOCAL PARTNERS\*

## CO-OP AD PROGRAMS

**9 PROGRAMS**  
**44 PARTNERSHIPS**  
**\$642,417 SPEND**  
**75,990,979 IMPRESSIONS**



## VISITOR MAGAZINE

**180,000 CIRCULATION**  
**163 PARTNER ADS**

## 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)



## HIGHWAY 1 DETOUR SUPPORT & RE-OPENING

**224 PROPERTY VISITS**      **\$86K CO-OP SPEND**  
**24 VISITOR CENTER & CHAMBER VISITS**      **6 INTERNATIONALLY-TRANSLATED DETOUR MAPS**

\*Metrics reflect data through March 2019

# EVENTS AND PARTNERSHIPS\*



visit  
California



2016 3.6B IMPRESSIONS

36,547 REFERRALS

43 EVENTS



2017 5.3B IMPRESSIONS

1,380 MEDIA REACHED

9 INTERNATIONAL MISSIONS



2018 CURRENTLY RUNNING

3 INTERNATIONAL TV SPOTS



A SAN LUIS OBISPO COUNTY EXPERIENCE®

SAN DIEGO

SEATTLE



6 EVENTS

59 PARTNERSHIPS

32K REACH



\$130K SPONSORSHIP

3 YEARS IN COUNTY SINCE THE START OF THE TMD

4 HOURS OF INTERNATIONAL TV COVERAGE

17M REACH



SAN LUIS OBISPO COUNTY FILM COMMISSION

392 PRODUCTIONS

1,135 FILMING DAYS

IMPACT: \$19M

## PUBLIC RELATIONS\*

1,166 MEETINGS

710 ARTICLES

679M IMPRESSIONS

\$8M AD EQUIVALENCY

308 FAM ATTENDEES

16 COUNTRIES - EXPOSURE

NATIONAL PUBLIC RELATIONS PARTNER

TURNER PR

\$100K PARTNERSHIP WITH

BLACK DIAMOND IN UNITED KINGDOM & IRELAND

## TRAVEL TRADE\*

26 TRADE SHOWS

796 APPOINTMENTS

16 MISSIONS

\$400M BUYING POWER

165 FAM ATTENDEES

6 COUNTRIES

# BRAND LIFT

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

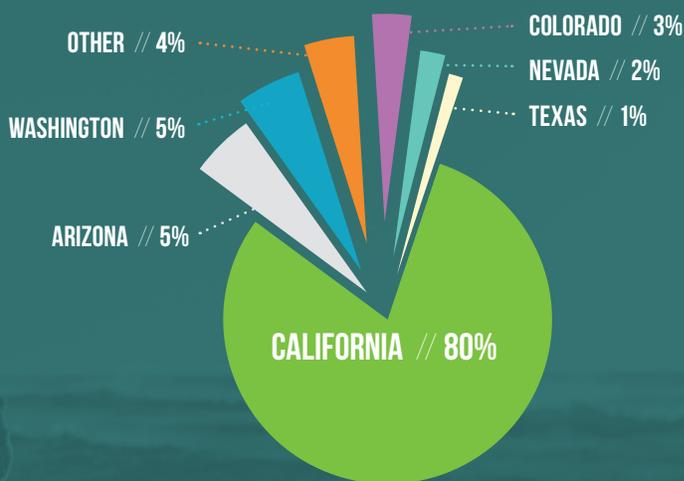
**38%** HAVE VISITED SLO CAL IN THE PAST  
UP FROM 36% IN WAVE 1\*  
**93%** WOULD VISIT AGAIN



SOURCE: RESEARCH NOW

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

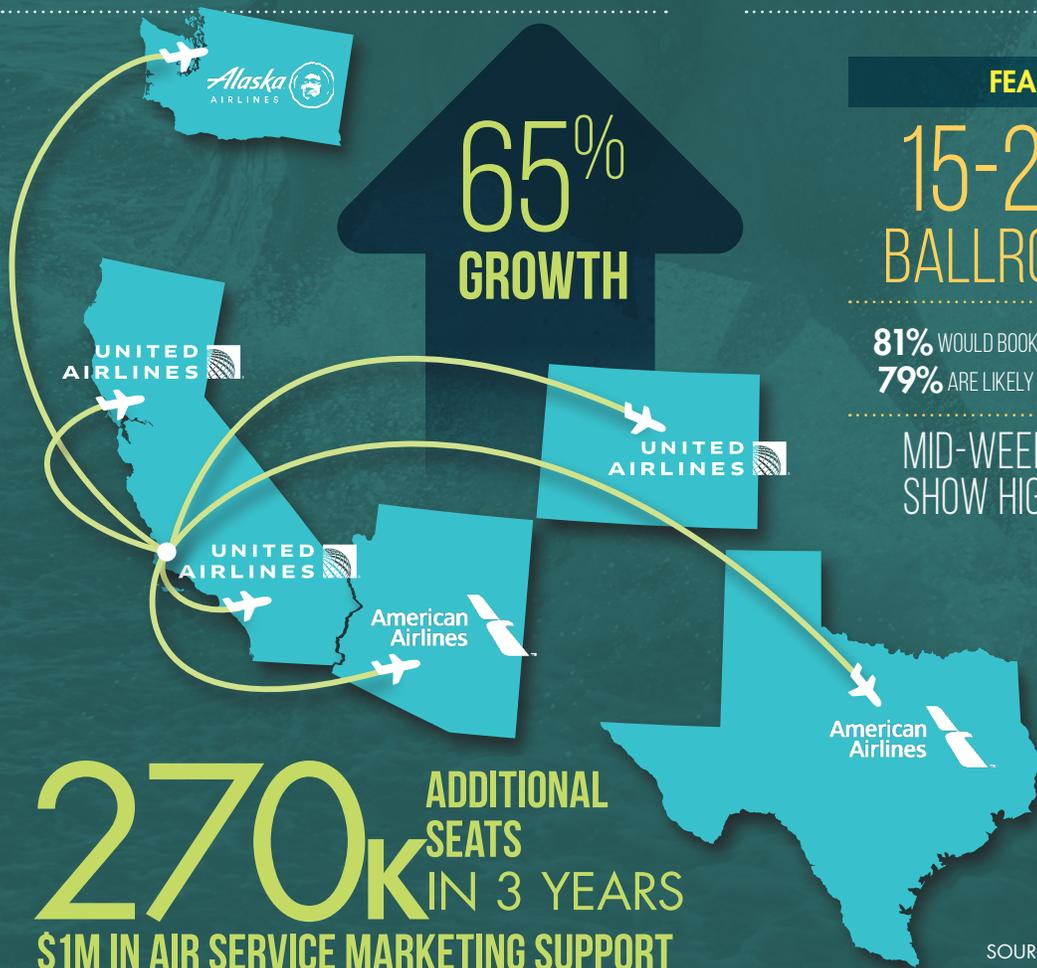
# TRACKED ARRIVALS\*\*



SOURCE: ARRIVALIST

\*\*Metrics reflect data through March 2019

# AIR SERVICE



## FEASIBILITY STUDY

**15-20,000** SQ FT  
**BALLROOM DESIRED**

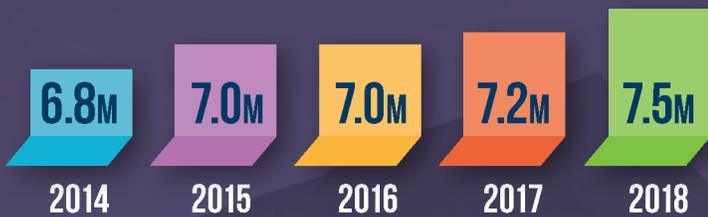
**81%** WOULD BOOK IN SLO CAL IF NEW FACILITY WAS BUILT  
**79%** ARE LIKELY TO RETURN IF NEW FACILITY WAS BUILT

MID-WEEK & SHOULDER SEASON  
SHOW HIGHEST POTENTIAL

SOURCE: VOLAIRE

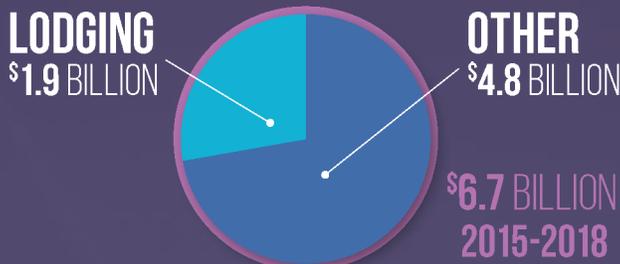
# VISITOR VOLUME\*

# VISITOR SPENDING\*



**10.2% GROWTH**  
2014-2018

SOURCE: TOURISM ECONOMICS

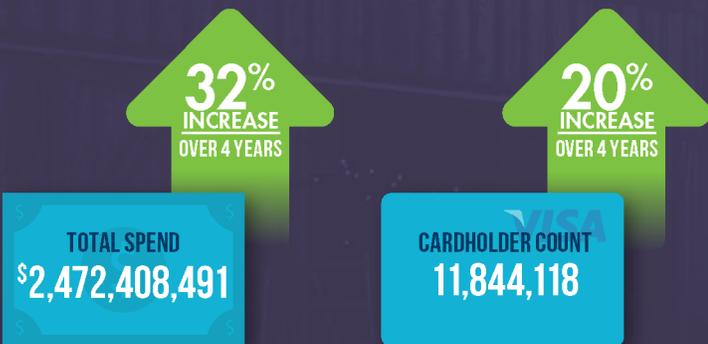


SOURCES: TOURISM ECONOMICS; DEAN RUNYAN, INC.

## VISAVUE® TRAVEL\*

### DOMESTIC

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



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)



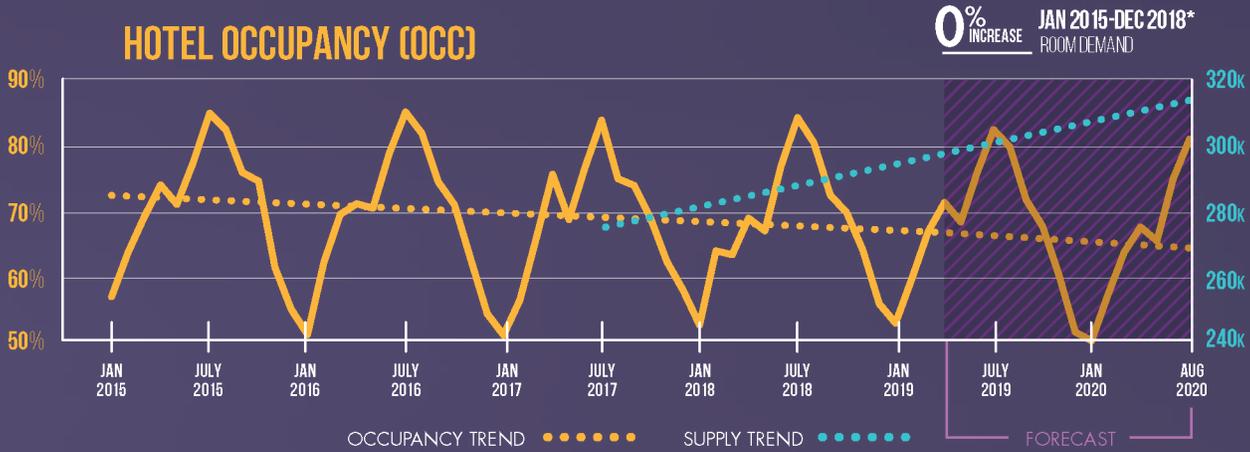
COUNTRY KEY

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

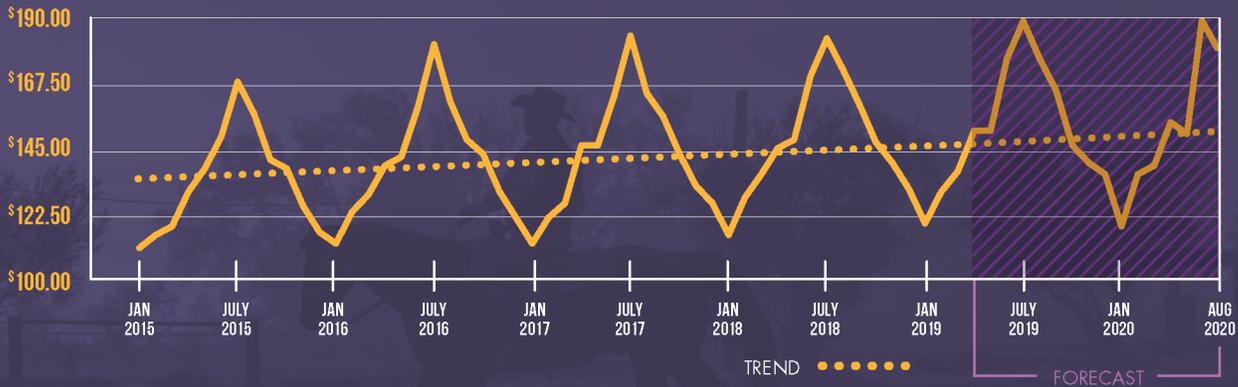


# VISIT SLO CAL MAKING A DIFFERENCE\*

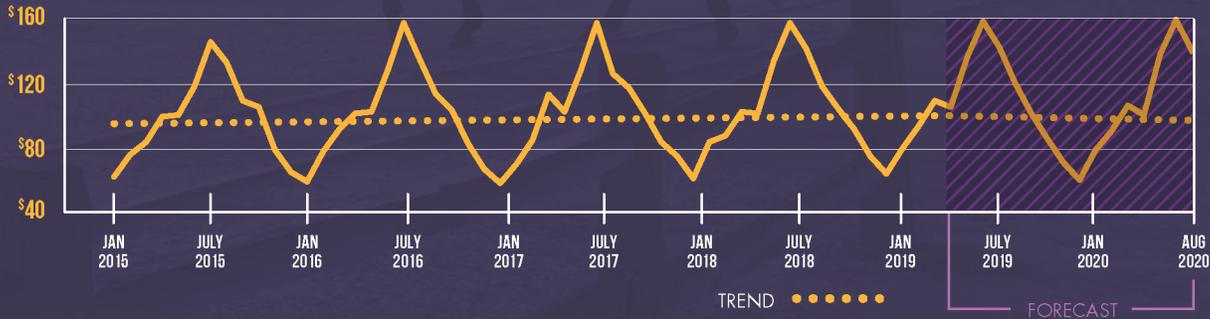
## HOTEL OCCUPANCY (OCC)



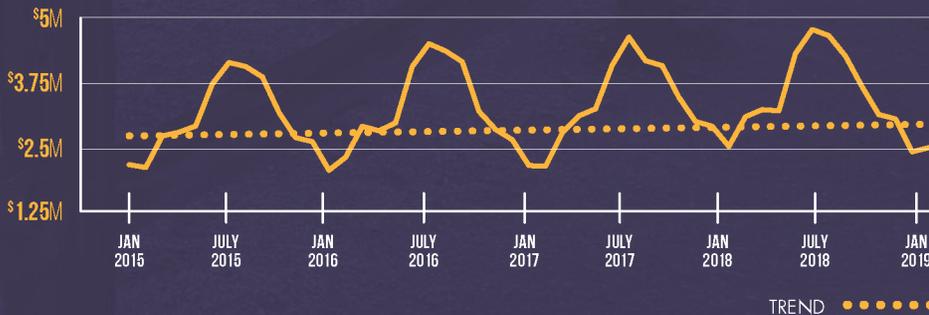
## AVERAGE DAILY RATE (ADR)



## 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

## TOTAL EXPENDITURES

FY 15/16



FY 16/17



FY 17/18



FY 18/19



**78%** OF TOTAL DOLLARS SPENT ON MARKETING, SALES AND PUBLIC RELATIONS OVER 4 YEARS

**\$10,723,473**