



# 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



## TARGET MARKETS

SOURCE: MERRILL RESEARCH

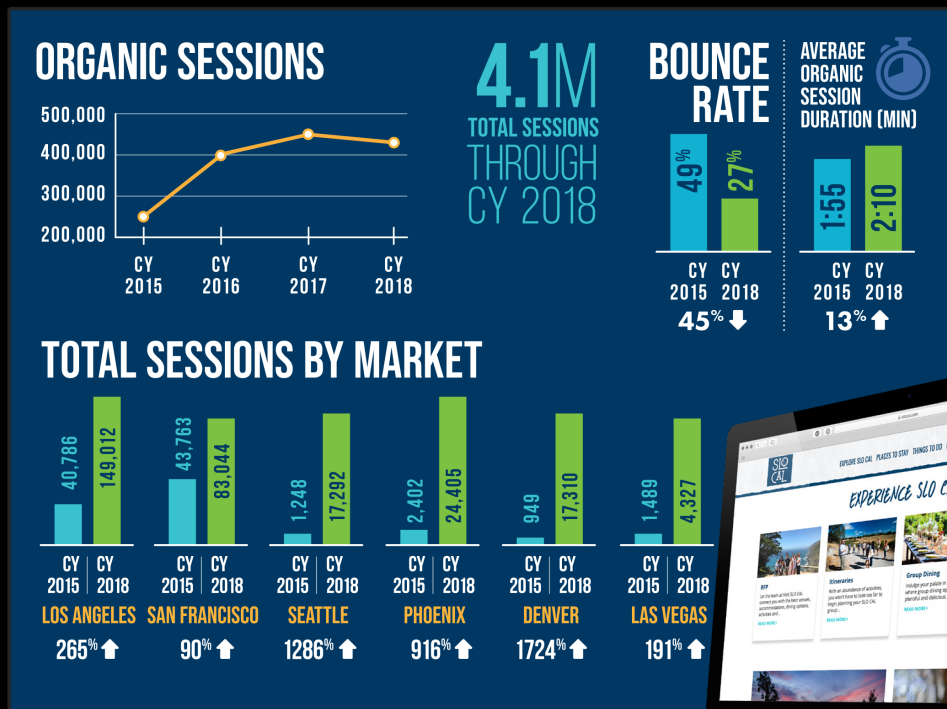
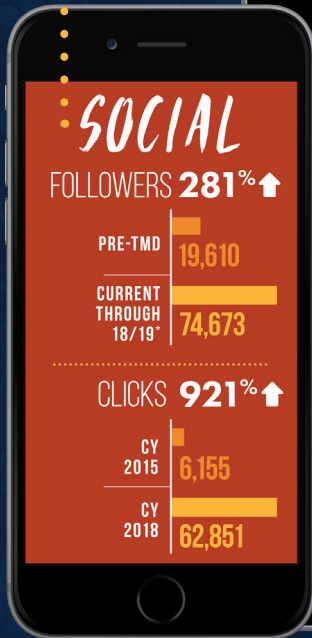
IMPERATIVE: ESTABLISH BRAND CLARITY AND INCREASED AWARENESS THROUGH UNIFIED EFFORTS

# 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\*



## VISITOR MAGAZINE

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

## CO-OP AD PROGRAMS

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



## 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

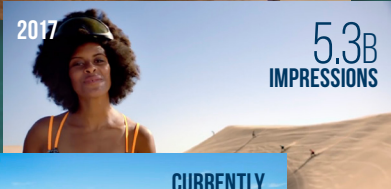


2016

3.6B  
IMPRESSIONS

36,547  
REFERRALS

43  
EVENTS



2017

5.3B  
IMPRESSIONS

1,380  
MEDIA REACHED

9

INTERNATIONAL MISSIONS

3

INTERNATIONAL TV SPOTS



2018

CURRENTLY  
RUNNING



\$130K  
SPONSORSHIP

3 YEARS IN  
COUNTY  
SINCE THE START OF THE TMD

4 HOURS OF  
INTERNATIONAL  
TV COVERAGE

17M REACH



A SAN LUIS OBISPO COUNTY EXPERIENCE®

SAN DIEGO

SEATTLE



6  
EVENTS

59  
PARTNERSHIPS

32K  
REACH



SAN LUIS OBISPO COUNTY  
FILM COMMISSION

392 PRODUCTIONS

1,135 FILMING DAYS

IMPACT: \$19M

IMPERATIVE: ESTABLISH BRAND CLARITY AND INCREASED AWARENESS THROUGH UNIFIED EFFORTS

## 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\*

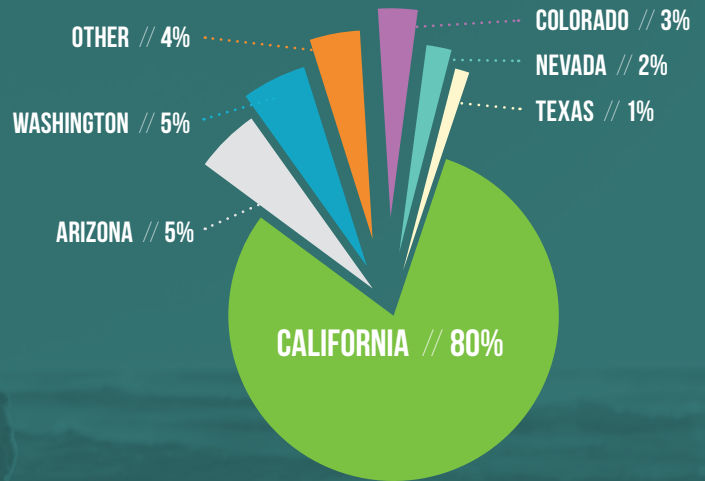
**93%** WOULD VISIT AGAIN



SOURCE: RESEARCH NOW

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

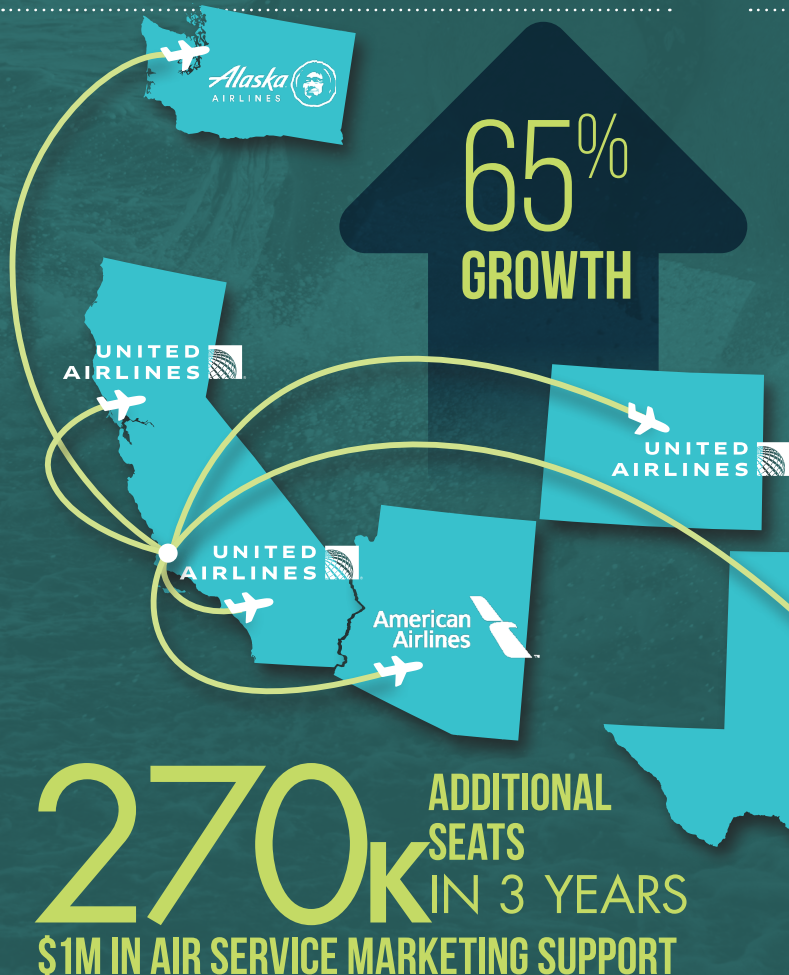
## TRACKED ARRIVALS\*\*



SOURCE: ARRIVALIST

\*\*Metrics reflect data through March 2019

## AIR SERVICE



## CONFERENCE CENTER

### FEASIBILITY STUDY

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

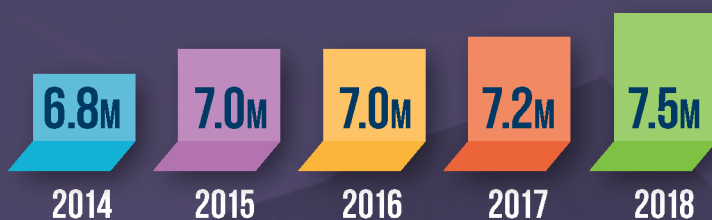
**81%** WOULD BOOK IN SLO CAL IF NEW FACILITY WAS BUILT  
**79%** ARE LIKELY TO RETURN IF NEW FACILITY WAS BUILT

MID-WEEK & SHOULDER SEASON SHOW HIGHEST POTENTIAL

SOURCE: VOLAIRE

# VISITOR VOLUME\*

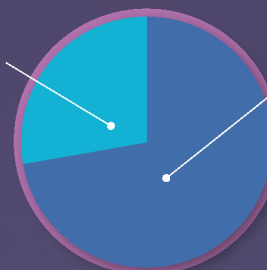
# VISITOR SPENDING\*



**10.2% GROWTH**  
2014-2018

SOURCE: TOURISM ECONOMICS

**LODGING**  
\$1.9 BILLION



**OTHER**  
\$4.8 BILLION

**\$6.7 BILLION**  
2015-2018

SOURCES: TOURISM ECONOMICS;  
DEAN RUNYAN, INC.

## VISAVUE® TRAVEL\*

## DOMESTIC

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

**32% INCREASE**  
OVER 4 YEARS

**TOTAL SPEND**  
\$2,472,408,491

**20% INCREASE**  
OVER 4 YEARS

**CARDHOLDER COUNT**  
11,844,118

### 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)

**1% INCREASE**  
OVER 4 YEARS

**TOTAL SPEND**  
\$78,987,990

**11% INCREASE**  
OVER 4 YEARS

**CARDHOLDER COUNT**  
517,929

### COUNTRY KEY

CN = CHINA

UK = UNITED KINGDOM

CA = CANADA

DE = GERMANY

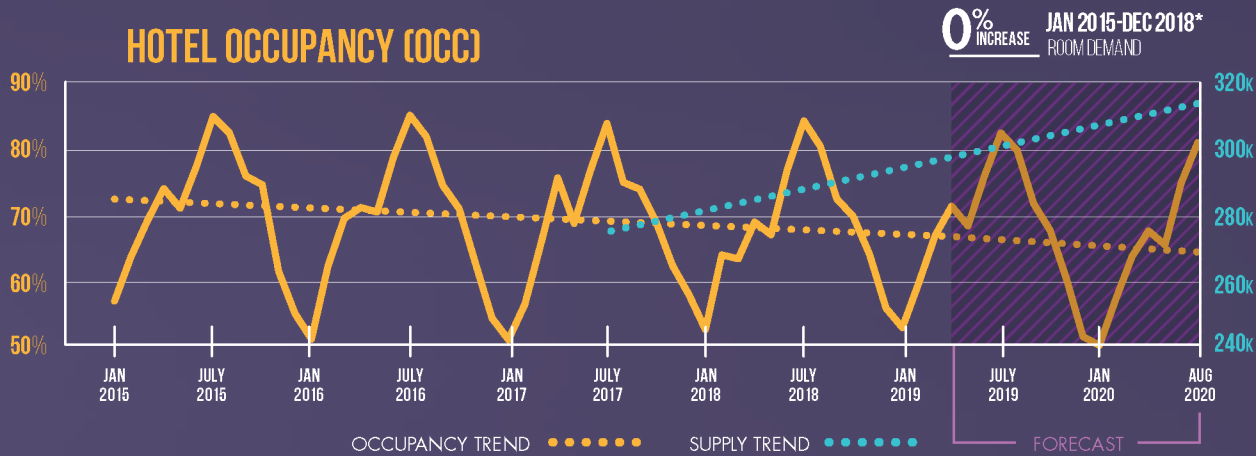
FR = FRANCE

AU = AUSTRALIA



# VISIT SLO CAL MAKING A DIFFERENCE\*

## HOTEL OCCUPANCY (OCC)



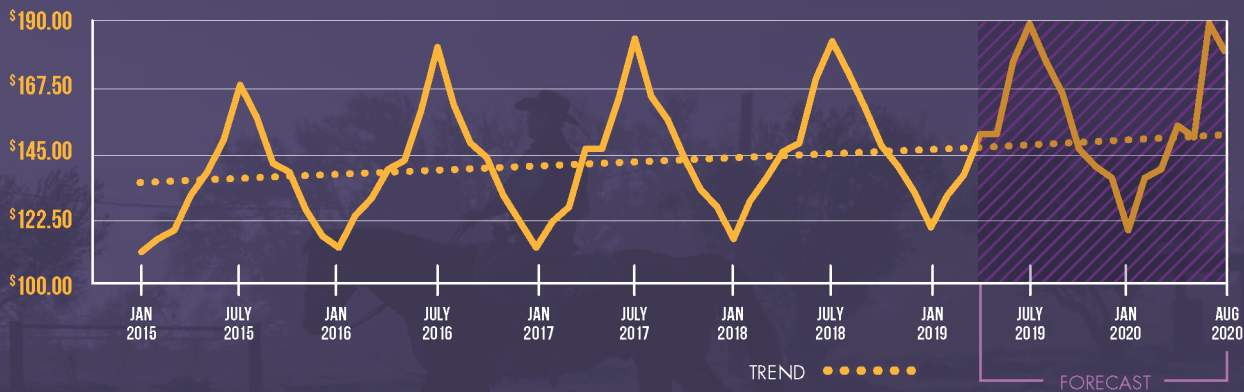
12% INCREASE

JULY 2017-  
AUG 2020  
ROOM SUPPLY

4% DECREASE

JAN 2015-  
DEC 2018  
OCCUPANCY

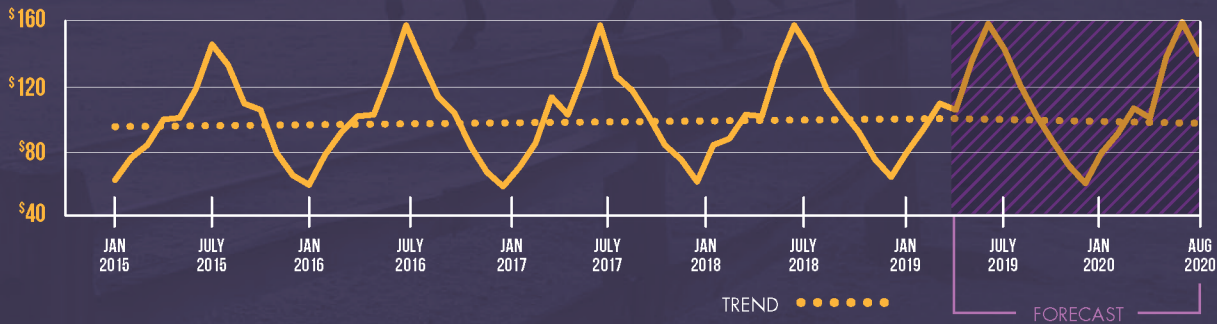
## AVERAGE DAILY RATE (ADR)



11% INCREASE

JAN 2015-  
DEC 2018  
ADR

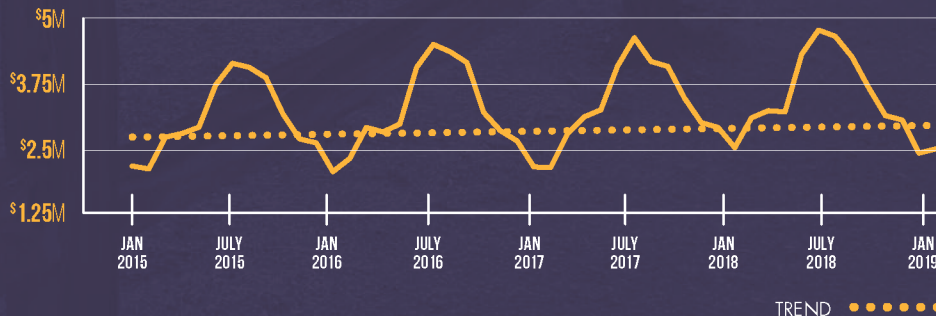
## REVENUE PER AVAILABLE ROOM (REVPAR)



7% INCREASE

JAN 2015-  
DEC 2018  
REVPAR

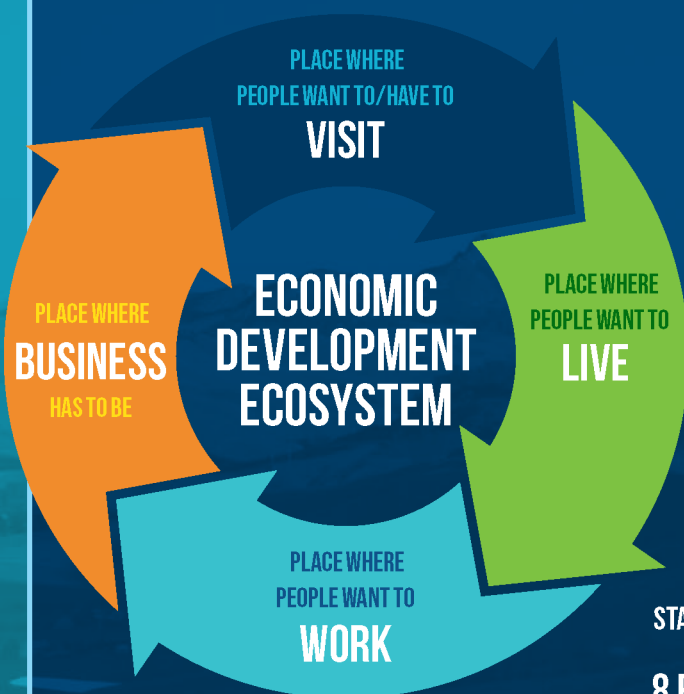
## TRANSIENT OCCUPANCY TAX (TOT)



16% INCREASE

JAN 2015-  
DEC 2018  
TOT

# 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



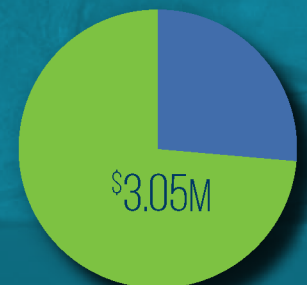
FY 16/17



FY 17/18



FY 18/19



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

**\$10,723,473**