

V I S I T



SAN LUIS OBISPO COUNTY  
CALIFORNIA®

# YEAR IN REVIEW



FY 2017/18



# WHY TOURISM MATTERS

## TRAVEL SPENDING

**\$1.75B**

UP 4.3% OVER 2016

## DIRECT SPENDING FROM EACH SECTOR



FOOD SERVICE  
**\$482M**



ACCOMMODATIONS  
**\$467M**



RETAIL  
**\$254M**



ARTS, ENTERTAINMENT  
& RECREATION  
**\$210M**

## VISITOR SPENDING

**\$1.68B**

UP 3.9% OVER 2016

## VISITOR SPENDING BY ACCOMMODATION TYPE

### HOTELS AND MOTELS



**\$1.05B**

### DAY TRAVEL



**\$344M**

### CAMPGROUNDS



**\$145M**

### PRIVATE HOMES



**\$98M**

### VACATION HOMES



**\$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

**20,250**

TOTAL JOBS

**\$645M**

IN INDUSTRY EARNINGS

### ACCOMMODATIONS & FOOD SERVICE

**12,400**  
JOBS

**\$433M**

### ARTS, ENTERTAINMENT & RECREATION

**5,620**  
JOBS

**\$123M**

### RETAIL

**1,520**  
JOBS

**\$52M**

### GROUND TRANSPORTATION

**480**  
JOBS

**\$23M**

### VISITOR AIR TRANSPORTATION

**70**  
JOBS

**\$5M**

### OTHER TRAVEL

**160**  
JOBS

**\$9M**



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'



**104** PARKS

EACH SLO CAL HOUSEHOLD WOULD PAY AN ADDITIONAL \$720<sup>28</sup> IN TAXES WITHOUT THE TAX REVENUE GENERATED BY TRAVEL AND TOURISM

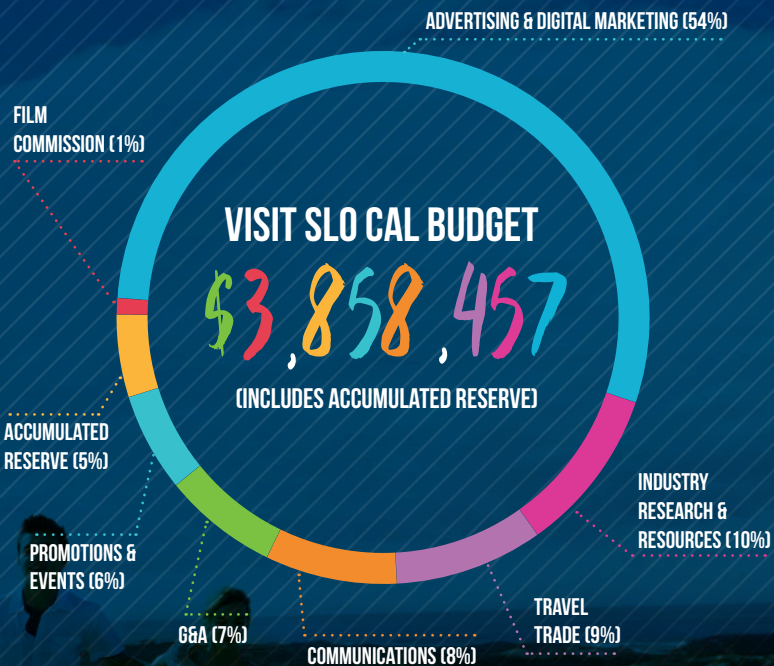
VISITOR TAX RECEIPTS

VS. BUSINESS TAX RECEIPTS

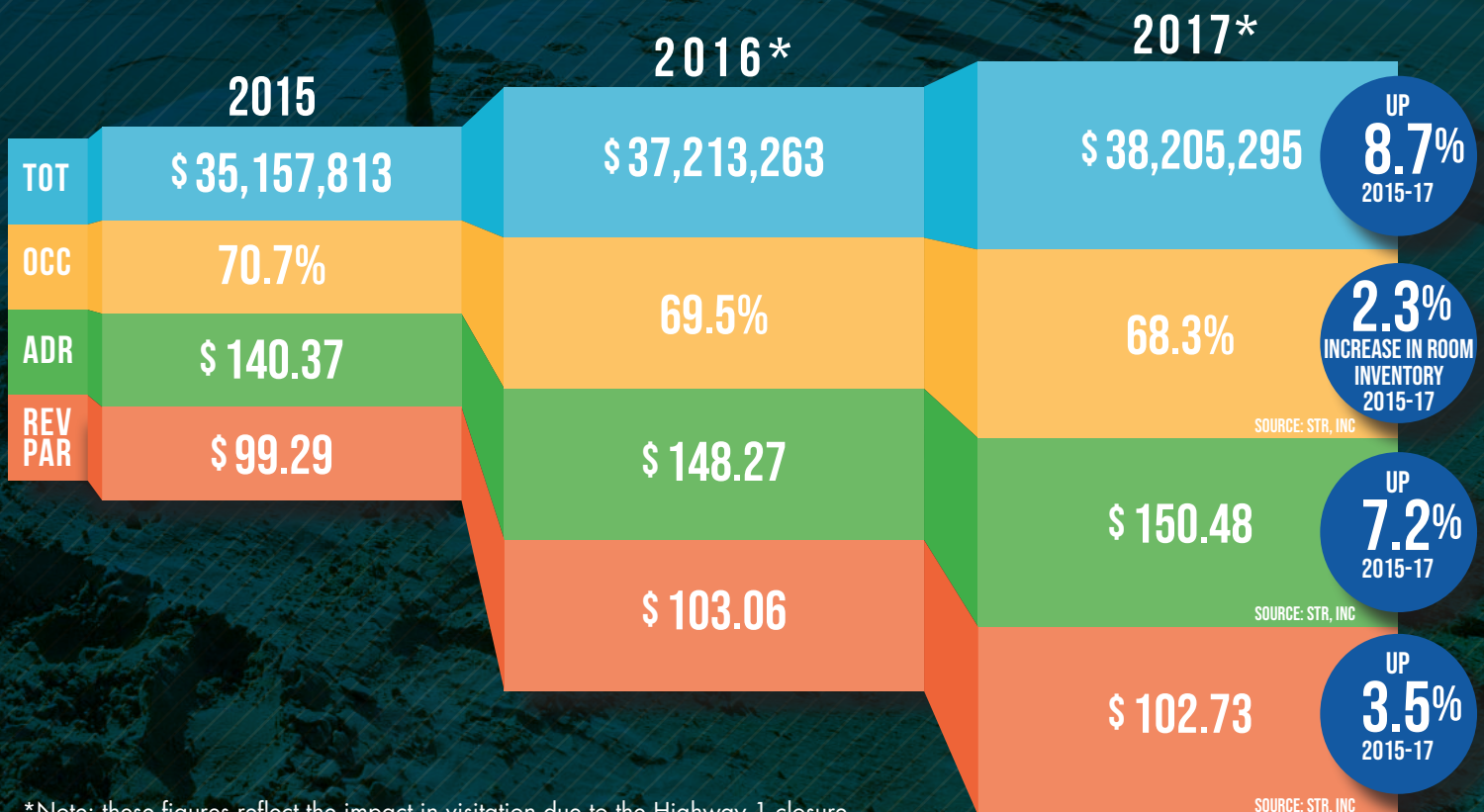
**\$56M**

**\$19M**

IMPERATIVE: OPTIMIZE OUR ORGANIZATIONAL CAPACITY



IMPERATIVE: DEMONSTRATE VALUE TO OUR STAKEHOLDERS, PARTNERS AND COMMUNITIES



\*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



32K FOLLOWERS  
54% INCREASE YOY



19.5K FOLLOWERS  
56% INCREASE YOY

NOTE: figures as of March, 2018

## PUBLIC RELATIONS

- NEW NATIONAL PR AGENCY TURNER PR
- 136 MEDIA ARTICLES

- 8 VISIT CALIFORNIA VISITS & EVENTS
- 118M U.S. PRESS CIRCULATION

## ADVERTISING

### CHANNELS

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



TOTAL MEDIA BUY: \$1.2M

- 25.3% LOS ANGELES
- 5.0% LAS VEGAS
- 14.8% DENVER
- 14.8% SEATTLE
- 25.3% SAN FRANCISCO
- 14.8% PHOENIX

NOTE: projected allocation, final figures may vary

IMPERATIVE: BUILD AND EXPAND STRATEGIC PARTNERSHIPS

# visit California



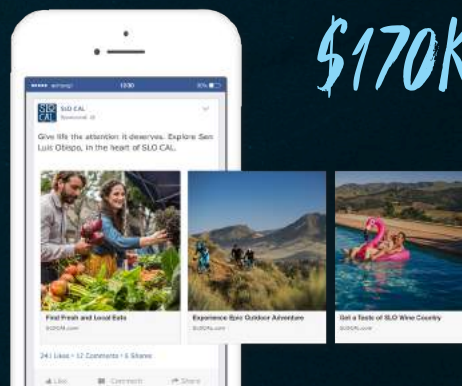
Poppy Award for Best Digital Marketing Campaign

## CO-OP MEDIA

\$170K

5

SOCIAL & NATIVE  
ADVERTISING

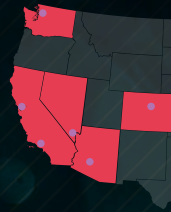




## BRAND AWARENESS



6 MARKETS



BRAND LIFT STUDY WAVE 2  
1,838

FAMILIARITY  
WITH SLO CAL

39% HAVE VISITED

61% HAVE NOT VISITED

## AD EFFECTIVENESS

SOMEWWHAT LIKELY OR  
VERY LIKELY TO VISIT  
SLO CAL IN THE  
NEXT 24 MONTHS

PRE-EXPOSURE

77%

POST-EXPOSURE

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

RVIA  
SAVOR

REACH  
38,000  
12,000

IMPERATIVE: ADVOCATE FOR THE DEVELOPMENT OF CRITICAL TOURISM INFRASTRUCTURE

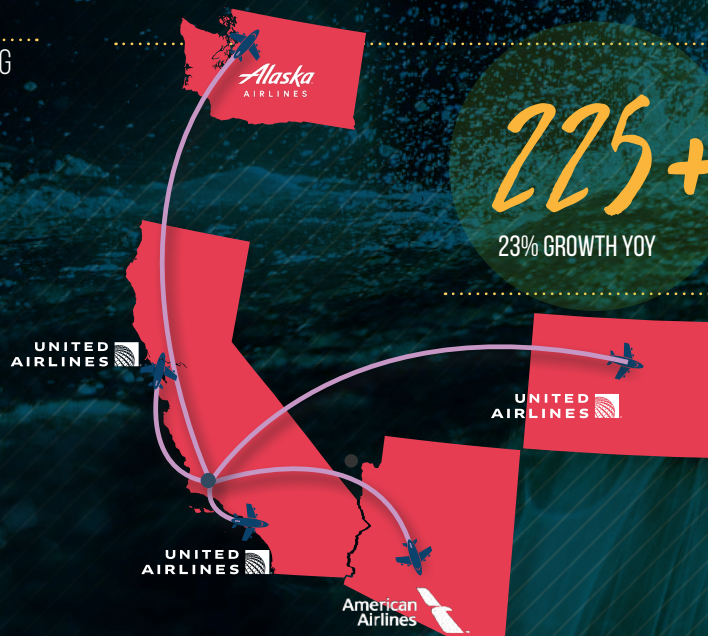
## DESTINATION MANAGEMENT STRATEGY

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+  
23% GROWTH YOY

ADDITIONAL DAILY  
DENVER FLIGHT  
+  
ENHANCED  
CAPACITY ON  
EXISTING FLIGHTS



## 2017 VISAVUE DOMESTIC TOURISM REPORT

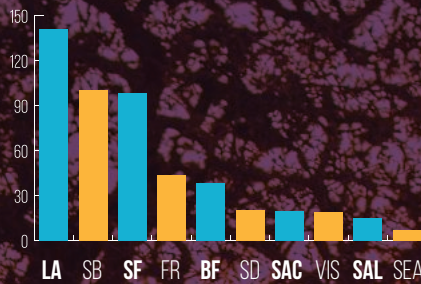


CONSUMER \$596,238,220 | COMMERCIAL \$ 57,928,096 | YOY CHANGE 10.4%

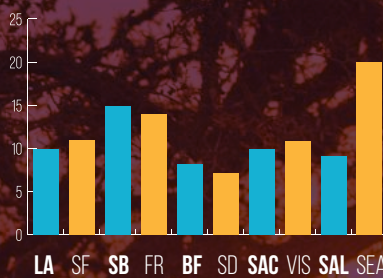


CONSUMER 12,734,094 | COMMERCIAL 765,584 | YOY CHANGE 7.9%

### 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/TULARE/PVILL

SAL = SALINAS

SEA = SEATTLE/TACOMA/BREMEN

SOURCE: VVT/VISA

## 2017 VISAVUE INTERNATIONAL TOURISM REPORT

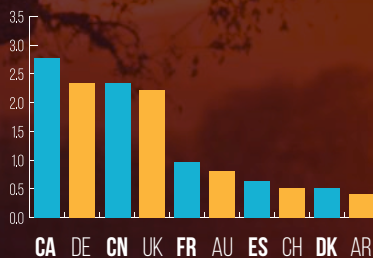


CONSUMER \$17,521,357 | COMMERCIAL \$1,131,558 | YOY CHANGE -9.6%



CONSUMER 234,677 | COMMERCIAL 8,411 | YOY CHANGE -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