

Quarterly Visitor Tracking for San Luis Obispo County, California – 2018

March 2019

Prepared for :

Visit SLO CAL



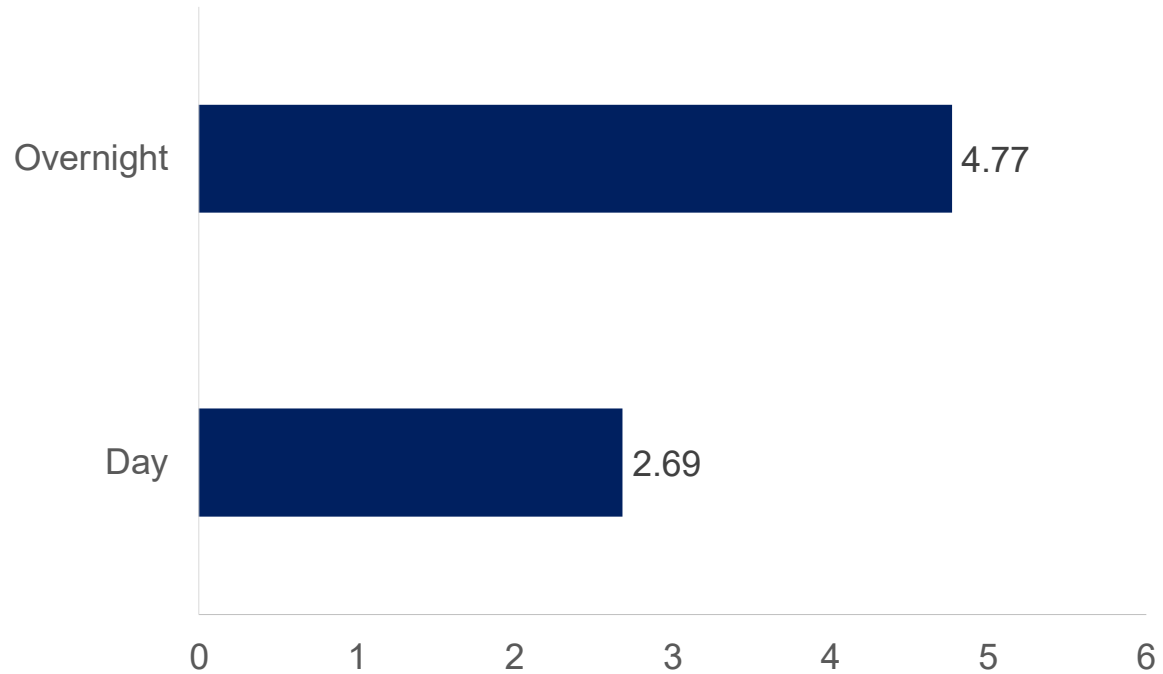
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SLO CAL hosted 7.46 million visitors in 2018

Overnight visitors outpaced day visitors in 2018, increasing 3.8% over 2017 levels to 4.77 million visits. Day visitors increased 2.5% over 2017 levels, registering 2.69 million visits.

SLO CAL visits, 2018



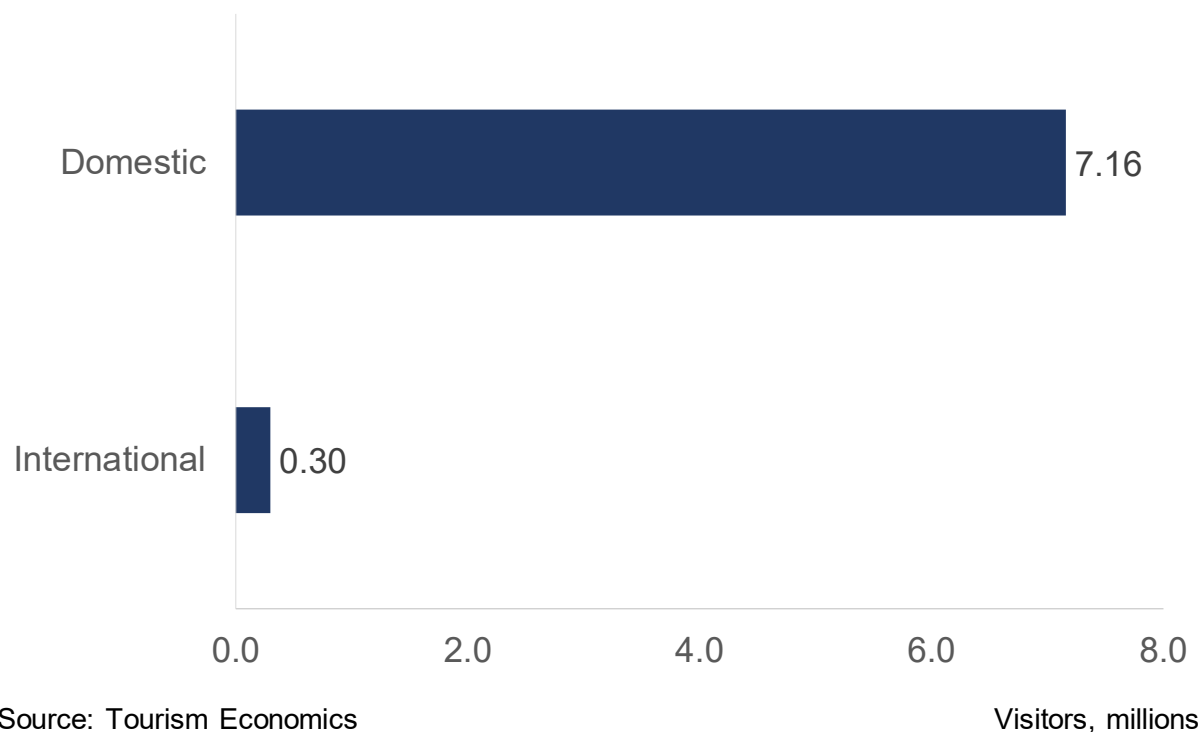
Source: Tourism Economics

Visitors, millions

SLO CAL hosted 7.46 million visitors in 2018

Domestic visitors outpaced international visitors in 2018, increasing 3.3% over 2017 levels to 7.16 million visits. International visitors increased 1.9% over 2017 levels, registering 0.30 million visits.

SLO CAL visits, 2018



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Quarterly visits to SLO CAL

in millions of visitors

	2017				2018			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Total visits	1.50	1.90	2.09	1.73	1.56	1.94	2.18	1.78
Overnight	0.96	1.20	1.335	1.10	1.01	1.23	1.40	1.13
Day	0.54	0.70	0.76	0.63	0.55	0.71	0.79	0.65
Domestic	1.43	1.83	2.02	1.65	1.49	1.86	2.11	1.70
International	0.07	0.07	0.07	0.08	0.07	0.08	0.07	0.09

Source: Tourism Economics

Note: Storms and mudslides in mid-2017 buried a portion of Highway 1, closing the highway for a total of 20 months and affecting accessibility and visitation to SLO CAL the second half of 2017. We assume that the reopening of Highway 1 in July 2018 was a contributing factor to increased visitation in 2018.

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Year-on-year % change in quarterly visits

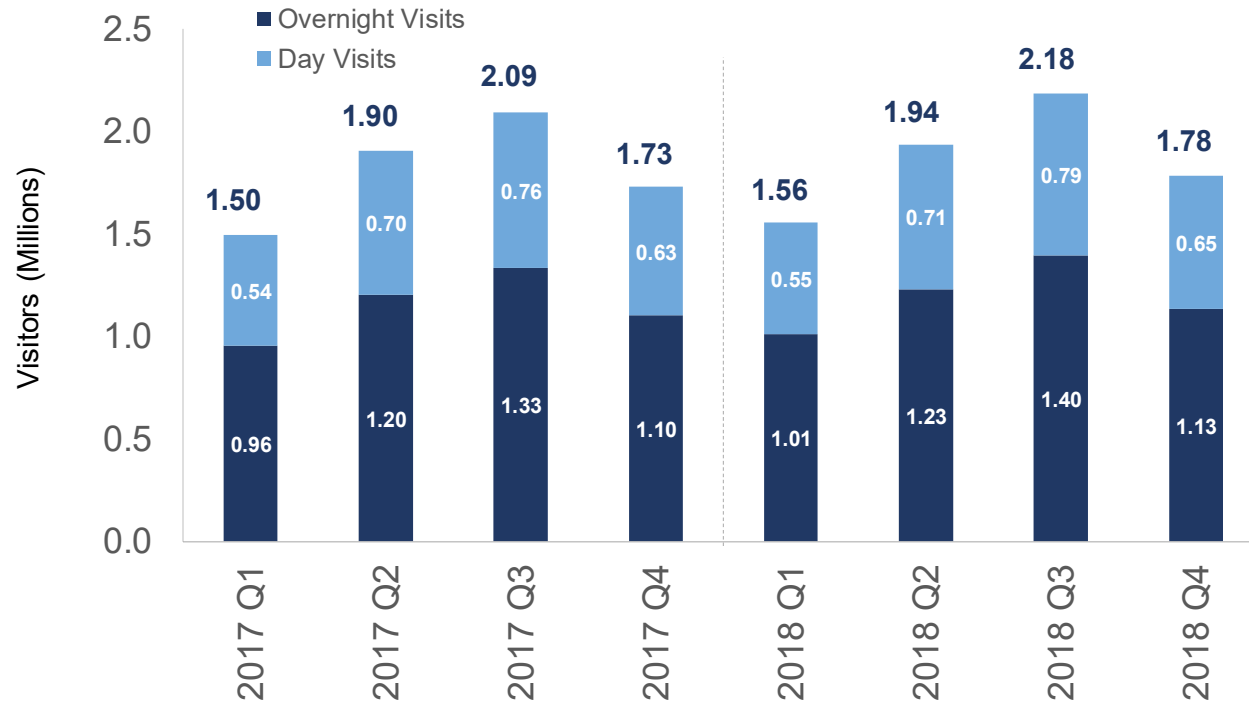
in YoY % change

	2018			
	Q1	Q2	Q3	Q4
Total visits	4.0%	1.8%	4.5%	3.0%
Overnight	5.8%	2.2%	4.6%	2.8%
Day	0.9%	1.1%	4.3%	3.3%
Domestic	4.0%	1.8%	4.5%	3.0%
International	0.0%	1.3%	3.6%	2.7%

Source: Tourism Economics

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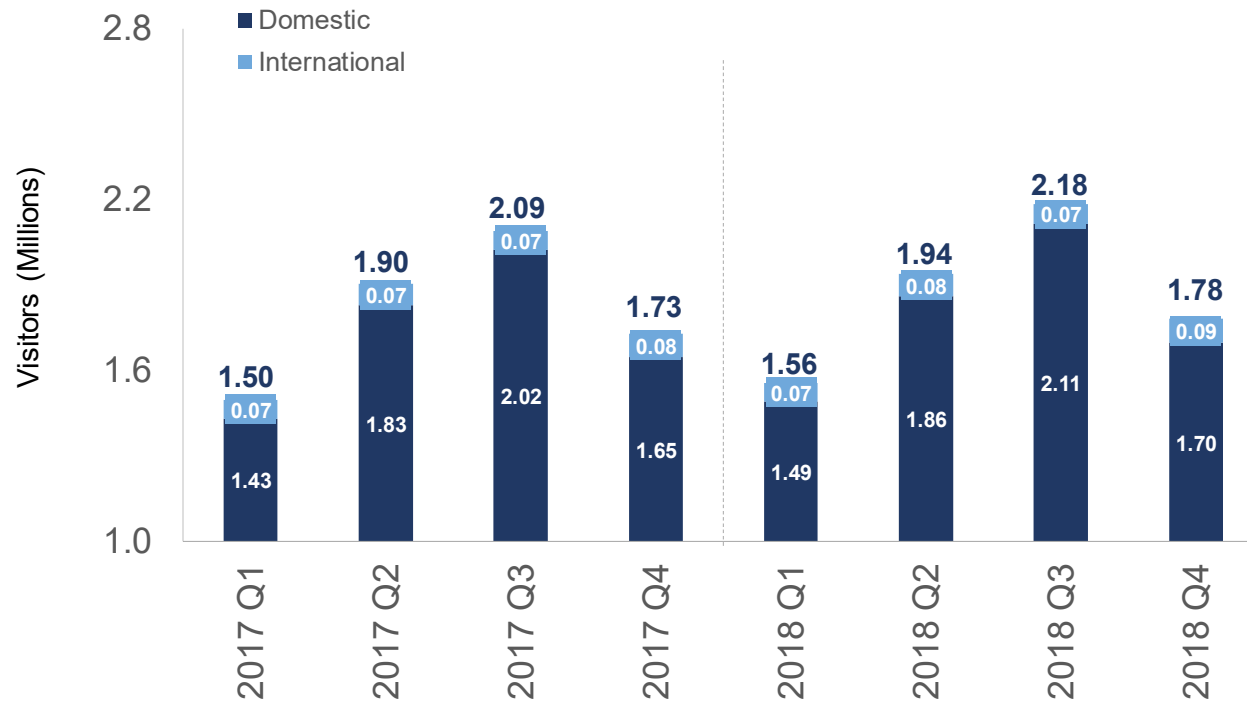
SLO CAL - Quarterly visits (2017-2018)



Source: Tourism Economics

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SLO CAL - Quarterly visits (2017-2018)



Source: Tourism Economics

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Annual visits to SLO CAL

in millions of visitors

	2014	2015	2016	2017	2018
Total visits	6.77	6.95	6.98	7.22	7.46
Overnight	4.13	4.30	4.37	4.60	4.77
Day	2.64	2.65	2.60	2.62	2.69
Domestic	6.46	6.64	6.68	6.93	7.16
International	0.31	0.31	0.29	0.29	0.30

Source: Tourism Economics

Note: Storms and mudslides in mid-2017 buried a portion of Highway 1, closing the highway for a total of 20 months and affecting accessibility and visitation to SLO CAL the second half of 2017. We assume that the reopening of Highway 1 in July 2018 was a contributing factor to increased visitation in 2018.

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Year-on-year % change in annual visits

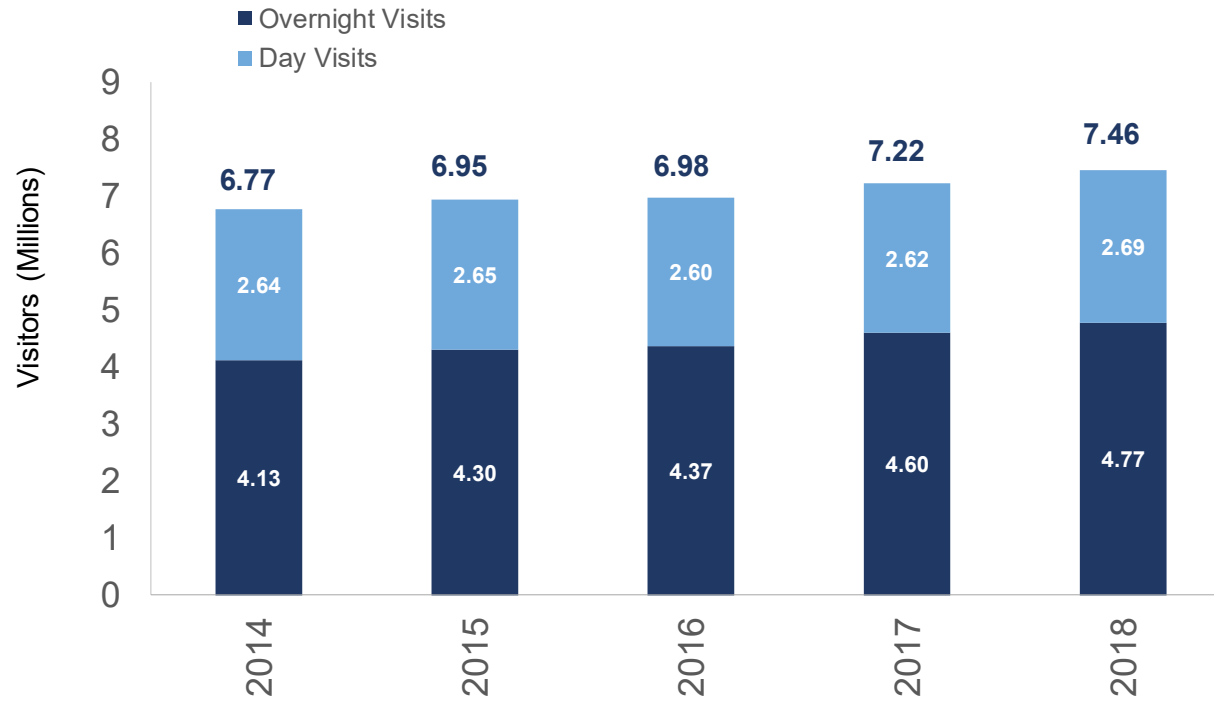
in YoY % change

	2015	2016	2017	2018
Total visits	2.7%	0.4%	3.5%	3.3%
Overnight	4.2%	1.6%	5.2%	3.7%
Day	0.3%	-1.7%	0.7%	2.5%
Domestic	2.7%	0.7%	3.7%	3.3%
International	2.6%	-6.3%	-0.4%	1.9%

Source: Tourism Economics

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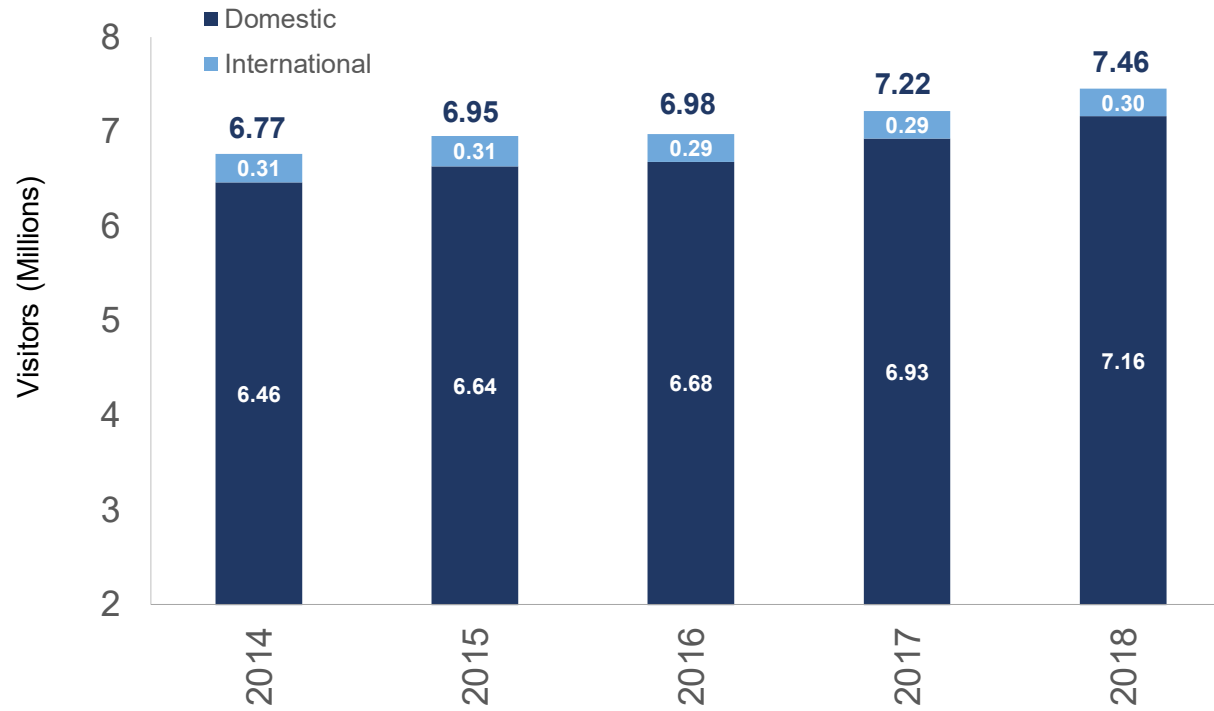
SLO CAL - Annual visits (2014-2018)



Source: Tourism Economics

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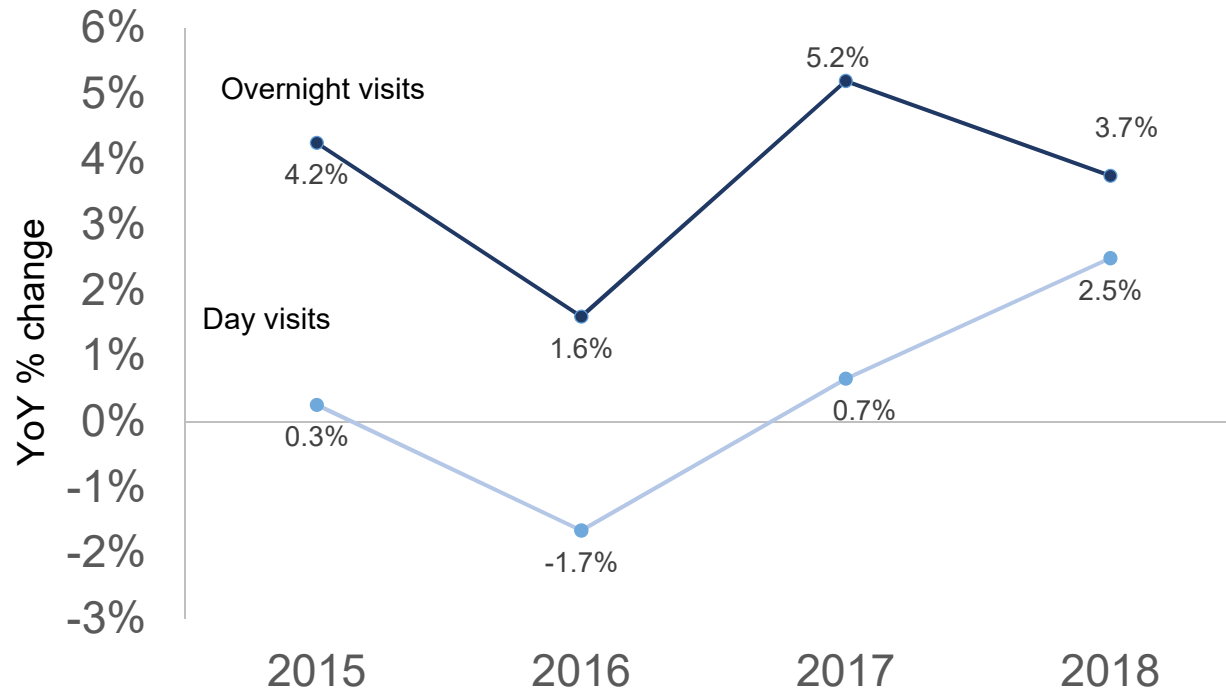
SLO CAL - Annual visits (2014-2018)



Source: Tourism Economics

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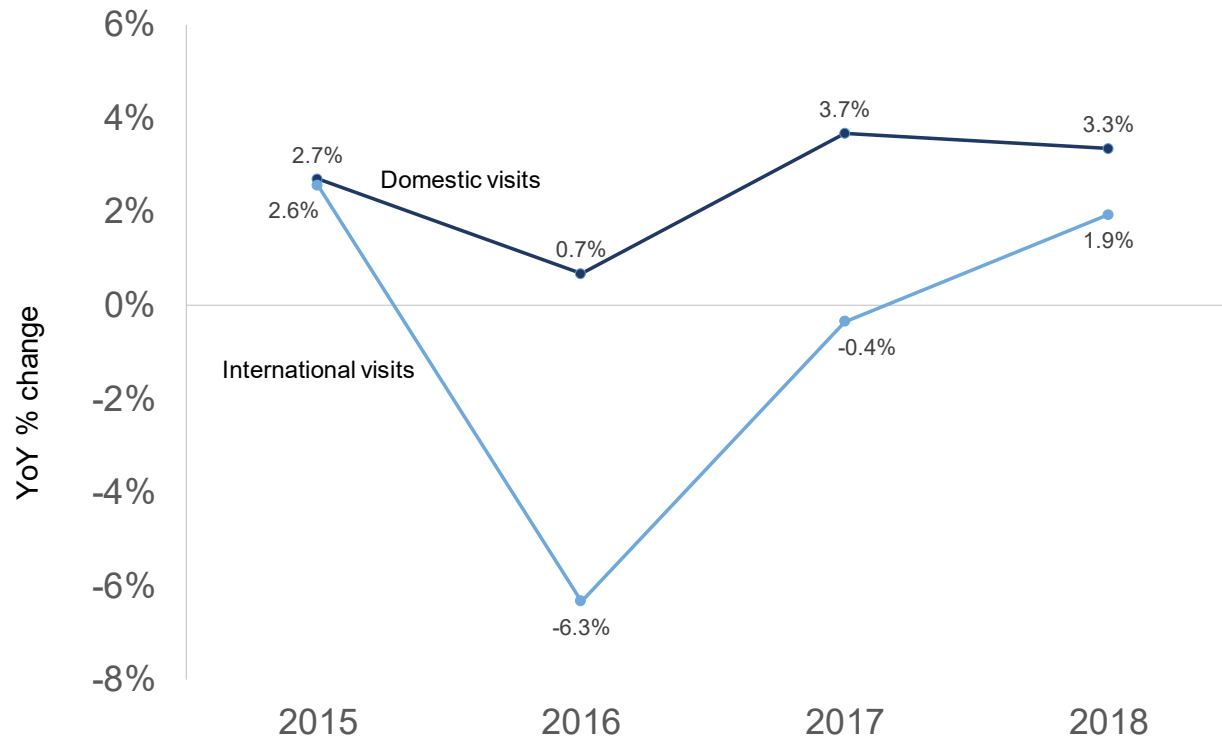
SLO CAL - YoY % change in annual visits (2015-2018)



Source: Tourism Economics

SLO CAL hosted 7.46 million visitors in 2018

SLO CAL - YoY % change in annual visits (2015-2018)



Source: Tourism Economics

About Tourism Economics

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of tourism dynamics with rigorous economics in order to answer the most important questions facing destinations, developers, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, tourism forecasting models, tourism policy analysis, and economic impact studies.

With over four decades of experience of our principal consultants, it is our passion to work as partners with our clients to achieve a destination's full potential.

Oxford Economics is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics enjoys a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of more than 120 professional economists; a dedicated data analysis team; global modeling tools, and a range of partner institutions in Europe, the US and in the United Nations Project Link. Oxford Economics has offices in London, Oxford, Dubai, Philadelphia, and Belfast.

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