YEAR IN REVIEW

2017
WHY TOURISM MATTERS

**TRAVEL SPENDING**

$1.59B

UP 1.2% OVER 2015

Source: Dean Runyan

**DIRECT SPENDING FROM EACH SECTOR**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Service</td>
<td>$431M</td>
</tr>
<tr>
<td>Accommodations</td>
<td>$415M</td>
</tr>
<tr>
<td>Retail</td>
<td>$265M</td>
</tr>
<tr>
<td>Arts, Entertainment &amp; Recreation</td>
<td>$191M</td>
</tr>
</tbody>
</table>

**VISITOR SPENDING BY ACCOMMODATION TYPE**

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Spending Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels and Motels</td>
<td>$923M</td>
</tr>
<tr>
<td>Day Travel</td>
<td>$318M</td>
</tr>
<tr>
<td>Campgrounds</td>
<td>$139M</td>
</tr>
<tr>
<td>Private Homes</td>
<td>$108M</td>
</tr>
<tr>
<td>Vacation Homes</td>
<td>$46M</td>
</tr>
</tbody>
</table>

**DIRECT SPENDING BY DOMESTIC AND INTERNATIONAL TRAVELERS AVERAGED:**

- $4.4M a day
- $181K an hour
- $3K a minute
- $50 a second

Source: Dean Runyan

**84% of travel companies are considered small businesses**

Source: US Travel Association

**1 out of 8 SLO County jobs depend on travel and tourism**

Source: California Economic Development Department

**VISITOR AIR TRANSPORTATION**

- Visitor jobs: 90
- Visitor earnings: $19M

**GROUND TRANSPORTATION**

- Jobs: 440
- Earnings: $51M

**ACCOMMODATIONS & FOOD SERVICE**

- Jobs: 10,650
- Earnings: $359M

**ARTS, ENTERTAINMENT & RECREATION**

- Jobs: 4,970
- Earnings: $104M

**RETAIL**

- Jobs: 1,490
- Earnings: $51M

**OTHER TRAVEL**

- Jobs: 180
- Earnings: $7M

**TOTAL JOBS**

- 17,820

**IN INDUSTRY EARNINGS**

- $551M
IMPERATIVE: DEMONSTRATE VALUE TO OUR STAKEHOLDERS, PARTNERS AND COMMUNITIES

LOCAL TAX REVENUE
$61.7M
Which covers expenses for:

- 898 Police Officers
- 119 Miles of 2-lane roads resurfaced
- 1025 Firefighters
- 86 Parks built

EACH SLO CAL HOUSEHOLD WOULD PAY AN ADDITIONAL $595.70 IN TAXES
Without the tax revenue generated by travel and tourism
Sources: Dean Runyan, U.S. Census Bureau

VISITOR TAX RECEIPTS vs. BUSINESS TAX RECEIPTS

VISIT SLO CAL BUDGET
$4,352,629
(Includes Accumulated Reserve)

Note: This reflects 14 months of revenue due to our transition from cash-based to accrual-based accounting.
Number of Domestic Arrivals in SLO CAL (by Cardholder Count): 2,946,398

**2016 VisaVue Domestic Tourism Report**

**TOTAL SPEND**

$592,487,687

- **Consumer** 542,161,113
- **Commercial** 50,326,574

**CARDHOLDER COUNT**

2,946,398

- **Consumer** 2,772,913
- **Commercial** 173,485

**TRANSACTION COUNT**

12,511,875

- **Consumer** 11,861,282
- **Commercial** 650,593

**TOP ORIGINATING MSAs: BY SPEND AMOUNT (SM)**

**TOP ORIGINATING MSAs: BY CARDHOLDER COUNT (1000’S)**

**CARDHOLDER COUNT TREND**

**TOP ORIGINATING MSAs: YOY $ GROWTH (PERCENTS)**

**TOP ORIGINATING MSAs: YOY CARDHOLDER GROWTH (PERCENTS)**

**TOP MARKET SEGMENTS BY SPEND AMOUNT (SM)**

**KEY**

LA = LA/Orange County/Riverside  
SF = San Francisco/Oakland/San Jose  
SB = Santa Barbara/Santa Maria  
FR = Fresno  
BF = Bakersfield  
SD = San Diego  
SAC = Sacramento/Yolo  
VIS = Visalia/Tul./P.Ville  
SA = Salinas  
SEA = Seattle/Tac/Brem.  
PHX = Phoenix - Mesa

**SOURCE:** VVT/Visa
2016 VISAVUE INTERNATIONAL TOURISM REPORT

NUMBER OF INTERNATIONAL ARRIVALS IN SLO CAL (BY CARDHOLDER COUNT): 134,756

**TOP 5 INTERNATIONAL MARKETS TO SLO CAL (BY CARDHOLDER COUNT)**

- **CHINA**: 20,960
- **GERMANY**: 19,590
- **CANADA**: 14,920
- **UK**: 14,480
- **FRANCE**: 7,860

**TOP 5 HIGH-GROWTH INTERNATIONAL TRAVEL MARKETS YOY (BY CARDHOLDER COUNT)**

- **CHINA**: 26.3%
- **SPAIN**: 22.2%
- **FRANCE**: 17.1%
- **SWEDEN**: 17.0%
- **DENMARK**: 16.0%

**TOTAL SPEND**

- **$20,632,090**
  - **CONSUMER**: $18,877,970
  - **COMMERCIAL**: $1,754,220

**CARDHOLDER COUNT**

- **134,756**
  - **CONSUMER**: 130,653
  - **COMMERCIAL**: 4,103

**TRANSACTION COUNT**

- **251,033**
  - **CONSUMER**: 241,848
  - **COMMERCIAL**: 9,185

**TOP ORIGINATING COUNTRIES BY SPEND AMOUNT ($M)**

- **CN**: $241,848
- **UK**: $19,590
- **CA**: $14,920
- **FR**: $14,480
- **AU**: $7,860

**CARDHOLDER COUNT TREND**

**TOP MARKET SEGMENTS BY SPEND AMOUNT ($M)**

- **Lodging**: $3,140
- **Oil**: $2,450
- **Supermarkets**: $3,140
- **Other Specialty Retail**: $2,450
- **Discount Stores**: $2,450

**KEY**

- **CN** = CHINA
- **UK** = UNITED KINGDOM
- **CA** = CANADA
- **DE** = GERMANY
- **FR** = FRANCE
- **AU** = AUSTRALIA
- **CH** = SWITZERLAND
- **DK** = DENMARK
- **ES** = SPAIN
- **SE** = SWEDEN

**SOURCE**: VVT/VISA
Imperative: Advocate for the development of critical tourism infrastructure

**Conference Center Feasibility Study**

- 15-20,000 sq ft Ballroom desired
  - 81% of those who haven’t booked before would consider booking in SLO CAL if the new facility was built
  - 84% of meeting planners would book in fall, winter and spring
  - Of those who have booked here, 79% are definitely or likely to return if the new facility was built

**New Air Service**

- Flight service to Seattle: $245,000 Market Activation
  - The “wine flies free” program allows SLO CAL visitors to bring their favorite wines back home with them
- Flight service to Denver: $215,000 Market Activation

**Mid-Week & Shoulder Season Show Highest Potential**

<table>
<thead>
<tr>
<th>Day</th>
<th>T</th>
<th>W</th>
<th>TR</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>57%</td>
<td>76%</td>
<td>74%</td>
<td>63%</td>
</tr>
<tr>
<td>2015</td>
<td>57%</td>
<td>76%</td>
<td>74%</td>
<td>63%</td>
</tr>
</tbody>
</table>

**The Numbers**

<table>
<thead>
<tr>
<th>Year</th>
<th>TOT</th>
<th>OCC</th>
<th>ADR</th>
<th>REV PAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$32,122,335</td>
<td>69.4%</td>
<td>$131.82</td>
<td>$91.42</td>
</tr>
<tr>
<td>2015</td>
<td>$35,156,333</td>
<td>70.7%</td>
<td>$140.37</td>
<td>$99.29</td>
</tr>
<tr>
<td>2016</td>
<td>$37,208,546</td>
<td>69.6%</td>
<td>$147.73</td>
<td>$102.75</td>
</tr>
</tbody>
</table>

Source: Visit SLO CAL

Source: STR, INC
PARTICIPANTS:
- Morro Bay • Arroyo Grande
- Atascadero • San Luis Obispo
- Pismo Beach

**Partial Media**
- 20.8k likes, 23% increase YOY
- 6.6k followers over FY 2015/16
- 12% increase YOY
- 7.1k followers over FY 2015/16
- 7% increase YOY

**CO-OP MEDIA**

- **$50,000 SPONSORSHIP**
  - 2 hours TV coverage
  - 30 second commercials
  - Online video & banner ads

**PARTICIPANTS:**
- Morro Bay • Arroyo Grande
- Atascadero • San Luis Obispo
- Pismo Beach

**Web and Social Media Results**

**ARTICLES**
- 2
- 5:90 videos

**صحيفة Visit California**

**PARTICIPANTS:**
- Atascadero • Paso Robles
- San Luis Obispo

**BuzzFeed**

**PARTICIPANTS:**
- Atascadero • Paso Robles
- San Luis Obispo

**Imperative: Build and Expand Strategic Partnerships**

- UK
- Australia
- Mexico
- China
- Canada
Imperative: Demonstrate value to our stakeholders, partners and communities

6 Markets
- Los Angeles
- San Francisco
- Seattle
- Phoenix
- Las Vegas
- Denver

Wave 1
- 1,733 completed surveys
- Age: 25 - 54
- Households income above $75,000
- Plan to take at least one U.S. leisure trip in next 12 months

Criteria

62% have not visited SLO CAL
38% have visited SLO CAL in the past of which 72% would visit again

Familiarity with SLO CAL

35% hosted media in SLOCAL
- April 1 - March 31
- 112 lodging properties
- 12 Chambers & visitor centers

Advertising Media

Total Web Traffic*: 1,409,506
Engaged Users: 99,267
Engaged Users CVR: 7.6%
Arrivals: 4,460
Content Page Views (Buzzfeed & Matador): 126,076
Cost per Arrival: $96.23
Cost per Weighted Conversion: $14.72
Cost per minute of engagement: $5.17

Travel Trade

5 FAMS with 55 attendees
7 Tradeshows visited with 103 leads and 46 prospects
3 sales missions - Mexico, China, UK
8 cities, 79 leads, 5 agency takeovers

Savor

San Diego - 5,000 attendees and 11 partners
Seattle - 2,000 attendees and 9 partners

Media Relations

35 hosted media in SLOCAL
- April 1 - March 31
- 25 total media mentions

In-Person outreach included:

Crisis Plan
- Developed & distributed traveler information tools to frontline staff
- Developed alternate route maps
- Provided blog & social media support for partners

Crisis Plan
- 112 lodging properties
- 12 Chambers & visitor centers

Crisis Plan
- Multiple media interviews

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