

YEAR IN REVIEW

FY **2019**  
**2020**







# BRAND ADVERTISING

**\$990.7k** SPEND | **444.3k** CLICKS | **98.3M** IMPRESSIONS

## BREAKDOWN BY CHANNEL

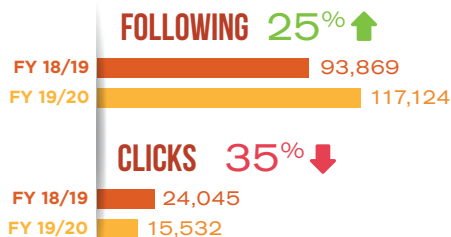
15% Social | 19% SEM | 66% Display, Native, Pre-Roll, etc.

## BREAKDOWN BY MARKET

37% Los Angeles, San Francisco | 43% Dallas, Denver, Las Vegas, Phoenix, Seattle  
19% San Diego | 1% Portland

**881k** SESSIONS | **50.46%** BOUNCE RATE | **120k** ENGAGED SESSIONS | **36k** QUALIFIED SESSIONS

## SOCIAL



**97%** CONNECTED TV VIDEO COMPLETION RATE  
5% ↑

**\$1.06** 3% ↓  
OVERALL COST PER LANDING PAGE ON SOCIAL

**3.89%** SEM CLICK-THROUGH RATE  
15% ↑

# PUBLIC RELATIONS

**74 MEETINGS**  
**261 ARTICLES**  
**58 INTERNATIONAL**  
**364M IMPRESSIONS**  
**\$1.6M AD EQUIVALENCY**  
**28 FAM ATTENDEES**



# TRAVEL TRADE

**5** TRADE SHOWS | **1** SALES MISSION  
**123** APPOINTMENTS  
**24** FAM ATTENDEES  
**298** LEADS



**62** PRODUCTIONS  
**85** FILMING DAYS  
**65** LEADS

**\$1.4M** ESTIMATED SPEND IN SLO CAL ECONOMIC IMPACT

# EVENTS & PARTNERSHIPS



**136** PRESS MENTIONS  
**24M** REACH

**340k** VIDEO VIEWS  
ACROSS YOUTUBE,  
WSL PLAYER AND  
SOCIAL MEDIA



**11** PARTNERS

SAN DIEGO BAY WINE + FOOD FESTIVAL



**11k** REACH

# SUPPORTING OUR PARTNERS



# COVID-19 RESPONSE

- Provided bi-weekly email updates with important industry resources
- Advocated at the county level for sensible ordinances and regulations
- Worked with Tourism Economics to develop a 24-month economic forecast
- Led START Guide Task Force subgroups and shared re-opening guidelines and resources
- Hosted virtual happy hours with A-list media and meeting planners

In mid-March, paid media was cut, and a spring media familiarization tour, two Tour and Travel trade shows and two international sales missions were canceled.



# EXPERIENCE SLO CAL

## 2050

In March 2020, the Visit SLO CAL Board approved, prioritized and budgeted the following scope of work in FY2020/21:

### ITEMS IN VISIT SLO CAL'S EXISTING SCOPE

- Air Service & Airport Development
- International Visitors
- Paso Robles & SLO Coast Wine
- SLO CAL Crafted

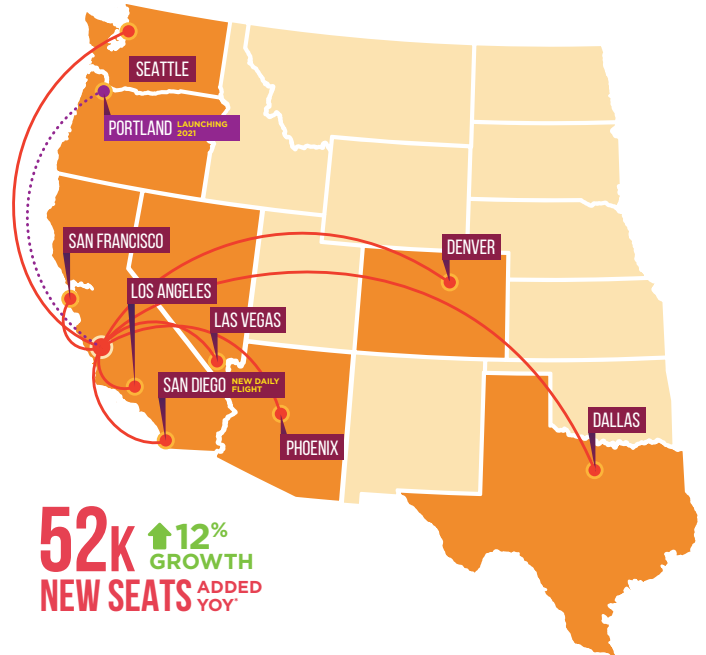
### ITEMS VISIT SLO CAL WILL ADVOCATE FOR/PARTNER ON

- Authentic Communities
- Countywide Trail System
- Nightlife, Music & Entertainment
- Workforce Housing & Transportation

### ITEMS VISIT SLO CAL WILL FUND/COMPLETE

- Chief Investment Officer
- Customer Service Training Program
- Events & Festivals Strategy
- Space Launch Events
- Thematic Routes

## AIR SERVICE DEVELOPMENT



*\*Increase reflects July 2019 to February 2020 compared to July 2018 to February 2019 (prior to air service losses due to COVID-19)*  
Source: Voltaire

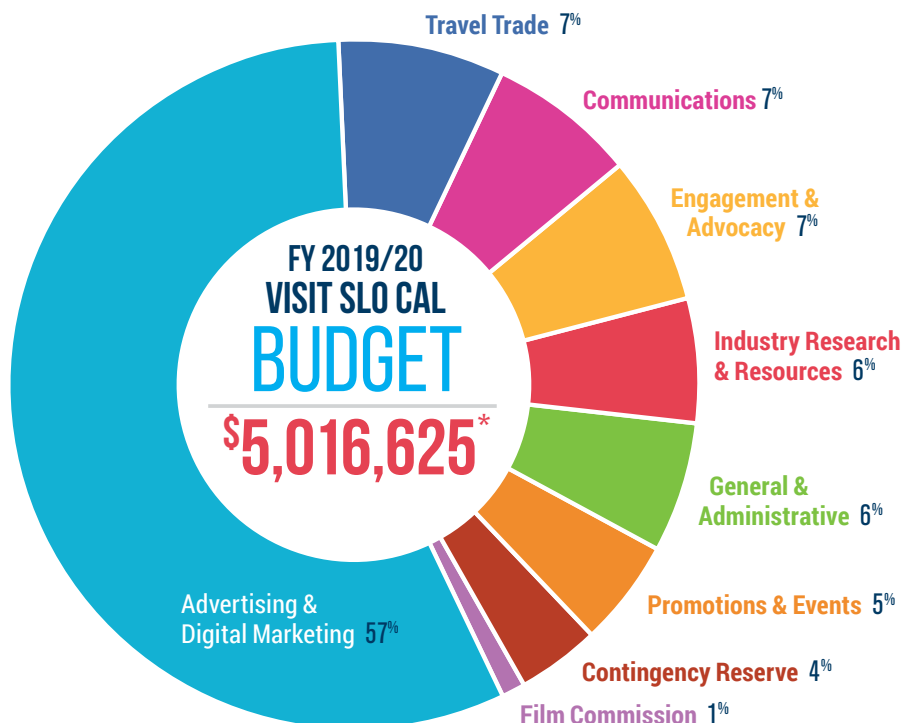


**2 INDUSTRY MEETINGS**  
WITH ASSEMBLYMAN CUNNINGHAM

**FINALIZED  
ADVOCACY PLAN**

**2 INDUSTRY MEETINGS**  
WITH REPRESENTATIVE CARBAJAL

**30 STAFF MEETINGS**  
WITH CITY COUNCIL MEMBERS, BOARD  
OF SUPERVISORS, CALIFORNIA AND  
UNITED STATES ELECTED OFFICIALS



## VISIT SLO CAL BUDGET

**\*VISIT SLO CAL MADE THE FOLLOWING  
EXPENSE REDUCTIONS FROM THE  
APPROVED BUDGET DUE TO COVID-19:**

- Reduced balance of FY 2019/20 budget by 72%
- Eliminated five full-time and three part-time positions
- Implemented temporary salary reductions of 20% for remaining team members
- Paused or reduced the scope of annual agency contracts



# TOURISM MARKETING DISTRICT RENEWAL

## INITIAL TERMS

**1.0%**

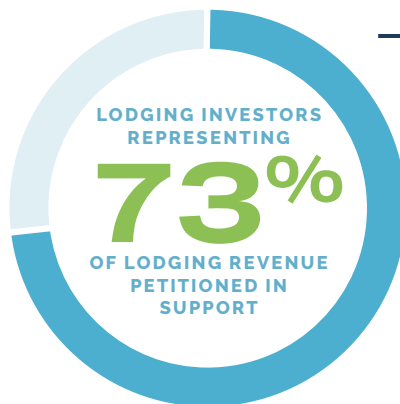
**5 YEAR TERM**

**\$44:\$1 RETURN ON INVESTMENT**

## RENEWAL TERMS

**1.5%**

**10 YEAR TERM**



**APPROVED 32:0**  
**BY CITY COUNCILS**

**5:0 VOTE OF CONSENT**  
FROM THE BOARD OF SUPERVISORS

## FINALIZATION OF STRATEGIC DIRECTION *2023*

### PROCESS

**170** SURVEY RESPONSES   **5** REGIONAL ENGAGEMENT SESSIONS  
**12** INVESTOR INTERVIEWS   **4** WORK SESSIONS

### IMPERATIVES



Enhance Our Organizational Capacity and Culture



Amplify and Steward the SLO CAL Brand Through Unified Efforts



Lead the County Tourism Industry in a Collaborative Resilience Planning Effort



Demonstrate Value to Investors, Partners, Stakeholders and Communities



## TOURISM ECOSYSTEM



# 2019 TOURISM BENEFIT



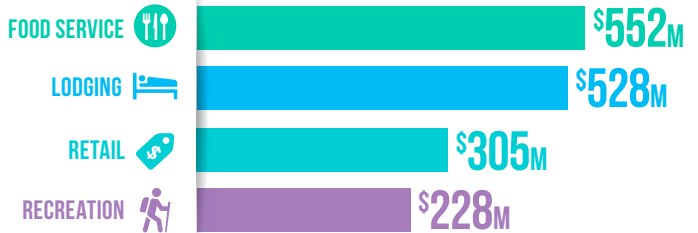
**VISITOR spending**

**\$1.94B**

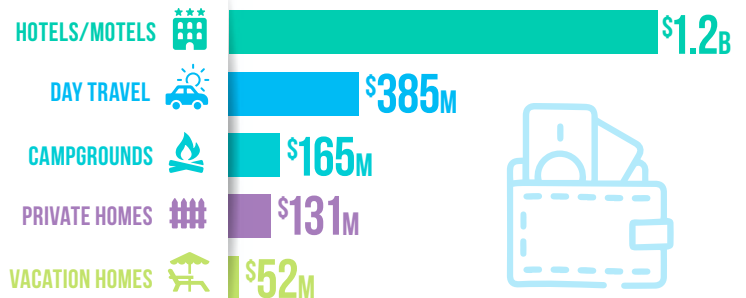
**83%**  
of travel businesses  
are considered  
small businesses

**1 OUT OF 6**  
SLO CAL JOBS  
depend on  
TRAVEL & TOURISM

## DIRECT SPENDING BY SECTOR



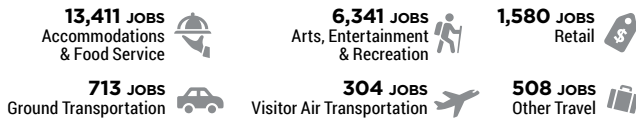
## DIRECT SPENDING BY ACCOMMODATION TYPE



## TOURISM PUTS

**22,857** **7.1%**  
YOY INCREASE

**RESIDENTS TO WORK EACH DAY**

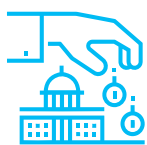


## TOURISM CONTRIBUTED

**\$43.7M** **6.5%**  
YOY INCREASE

**IN TRANSIENT OCCUPANCY TAX REVENUE**

**WITHOUT TOURISTS**  
**EACH SLO CAL HOUSEHOLD**  
**WOULD NEED TO SPEND** **\$18,843**  
**AN ADDITIONAL**  
**TO CREATE THE SAME ECONOMIC BENEFIT**  
**for the community**



**WITHOUT STATE & LOCAL TAX REVENUE**  
**GENERATED BY TRAVEL & TOURISM**  
**EACH SLO CAL HOUSEHOLD WOULD**  
**PAY AN ADDITIONAL** **\$1,690** **in taxes**

**TRAVEL SPENDING GENERATED**

**\$90M**

**IN DIRECT COMMUNITY INVESTMENT**

which could cover the expenses for

**887** POLICE OFFICERS' SALARIES

OR

**1,103** FIREFIGHTERS' SALARIES

OR

**1,931** TEACHERS' SALARIES

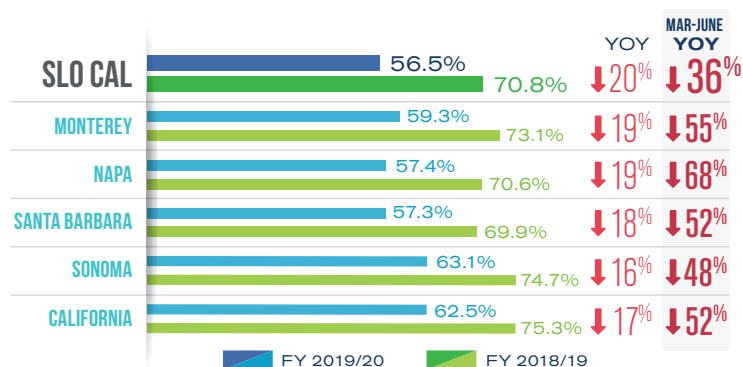
OR

**144** MILES OF 2-LANE RESURFACED ROADS

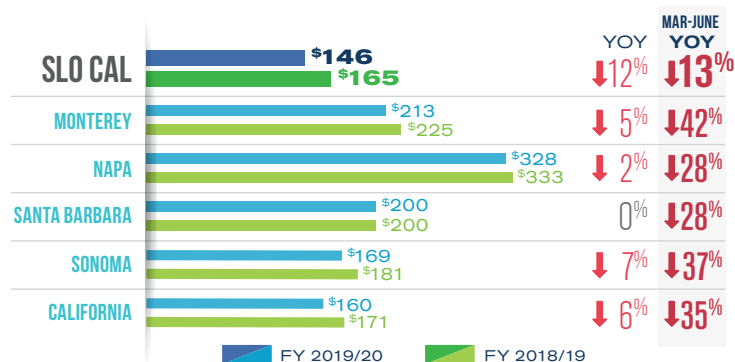
**TOURISM COMPRISES 9.7% OF COUNTYWIDE GDP**



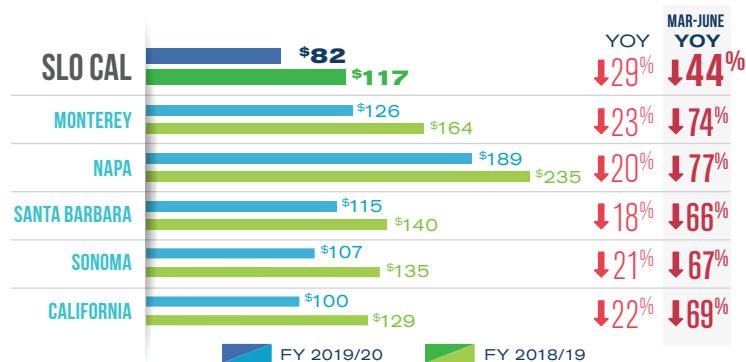
## HOTEL OCCUPANCY (OCC)



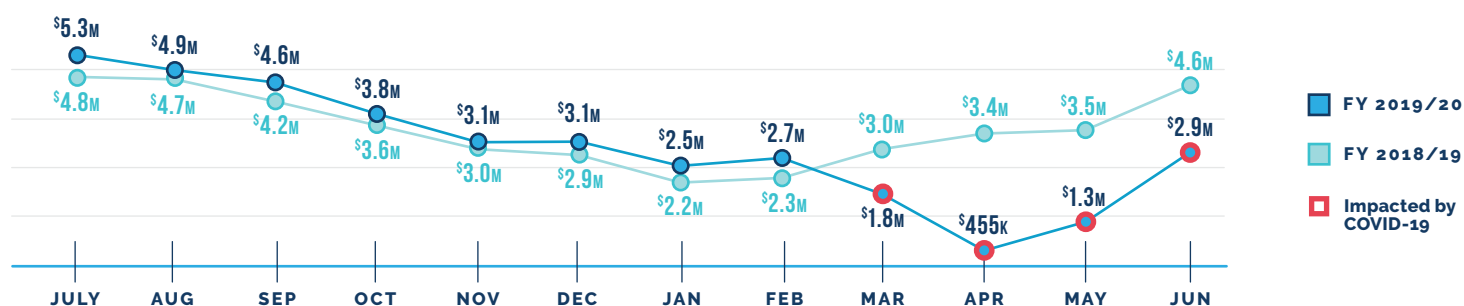
## AVERAGE DAILY RATE (ADR)



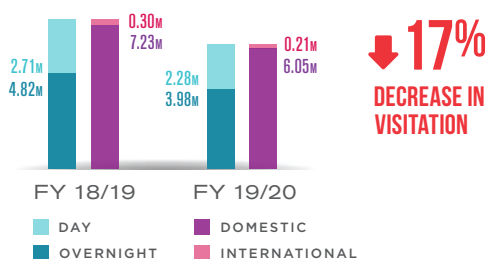
## REVENUE PER AVAILABLE ROOM (REVPAR)



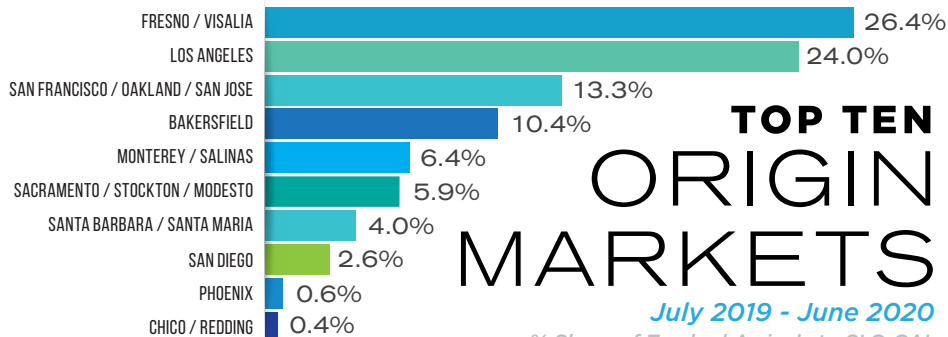
## TRANSIENT OCCUPANCY TAX (TOT)



## VISITOR VOLUME



## ARRIVALS



## TOP TEN ORIGIN MARKETS

July 2019 - June 2020

% Share of Tracked Arrivals to SLO CAL