

V I S I T



SAN LUIS OBISPO COUNTY  
CALIFORNIA

# YEAR IN REVIEW



2017



# WHY TOURISM MATTERS

## TRAVEL SPENDING

**\$1.59B**

UP 1.2% OVER 2015

SOURCE: DEAN RUNYAN

## DIRECT SPENDING FROM EACH SECTOR

FOOD SERVICE



**\$431M**

ACCOMMODATIONS



**\$415M**

RETAIL



**\$265M**

ARTS, ENTERTAINMENT & RECREATION



**\$191M**

## VISITOR SPENDING

**\$1.53B**

UP 1.1% OVER 2015

## VISITOR SPENDING BY ACCOMMODATION TYPE

HOTELS AND MOTELS



**\$923M**

DAY TRAVEL



**\$318M**

CAMPGROUNDS



**\$139M**

PRIVATE HOMES



**\$108M**

VACATION HOMES



**\$46M**

## 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

**17,820**

TOTAL JOBS

**\$551M**

IN INDUSTRY EARNINGS

ACCOMMODATIONS & FOOD SERVICE

**10,650**  
JOBS

**\$359M**

ARTS, ENTERTAINMENT & RECREATION

**4,970**  
JOBS

**\$104M**

RETAIL

**1,490**  
JOBS

**\$51M**

GROUND TRANSPORTATION

**440**  
JOBS

**\$19M**

VISITOR AIR TRANSPORTATION

**90**  
JOBS

**\$7M**

OTHER TRAVEL

**180**  
JOBS

**\$11M**



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<sup>70</sup> IN TAXES

WITHOUT THE TAX REVENUE GENERATED BY TRAVEL AND TOURISM

SOURCES: DEAN RUNYAN, U.S. CENSUS BUREAU

VISITOR TAX RECEIPTS

\$44M

VS. BUSINESS TAX RECEIPTS

\$18M

IMPERATIVE: OPTIMIZE OUR ORGANIZATIONAL CAPACITY

TRAVEL TRADE (9%)

G&A (5%)

ACCUMULATED  
RESERVE (8%)

FILM  
COMMISSION (1%)

INDUSTRY RESEARCH & RESOURCES (9%)

COMMUNICATIONS (9%)

PROMOTIONS &  
EVENTS (6%)

VISIT SLO CAL BUDGET

\$4,352,629

(INCLUDES ACCUMULATED RESERVE)

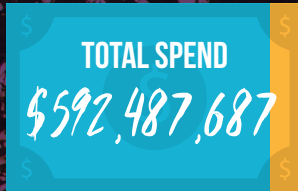
ADVERTISING & DIGITAL MARKETING (53%)

Note: This reflects 14 months of revenue due to our transition from cash-based to accrual-based accounting.

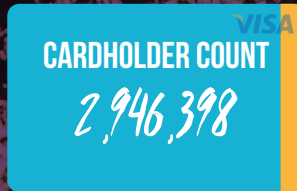


# 2016 VISAVEE DOMESTIC TOURISM REPORT

NUMBER OF DOMESTIC ARRIVALS IN SLO CAL (BY CARDHOLDER COUNT): 2,946,398



**CONSUMER** 542,161,113  
**COMMERCIAL** 50,326,574

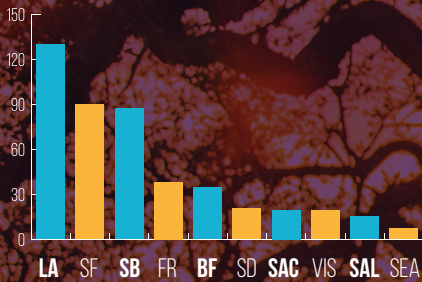


**CONSUMER** 2,772,913  
**COMMERCIAL** 173,485



**CONSUMER** 11,851,282  
**COMMERCIAL** 660,593

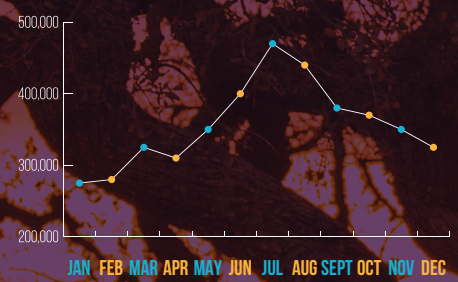
**TOP ORIGINATING MSA<sub>s</sub> BY SPEND AMOUNT (\$M)**



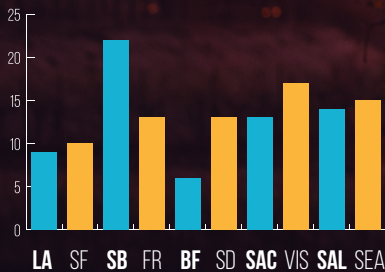
**TOP ORIGINATING MSA<sub>s</sub> BY CARDHOLDER COUNT (1000'S)**



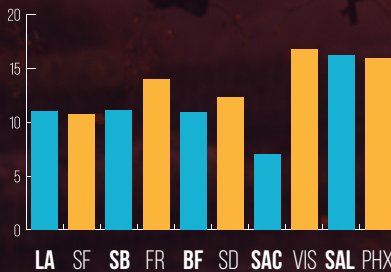
**CARDHOLDER COUNT TREND**



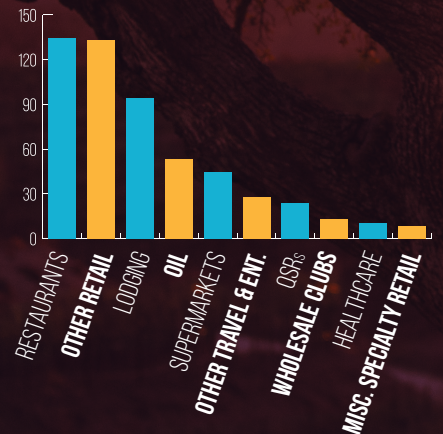
**TOP ORIGINATING MSA<sub>s</sub> YOY \$ GROWTH (PERCENTS)**



**TOP ORIGINATING MSA<sub>s</sub> YOY CARDHOLDER GROWTH (PERCENTS)**



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



**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./PVILLE

SAL = SALINAS

SEA = SEATTLE/TAC/BREM.

PHX = PHOENIX - MESA



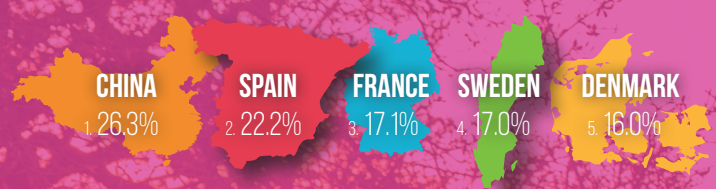
# 2016 VISAVE INTERNATIONAL TOURISM REPORT

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

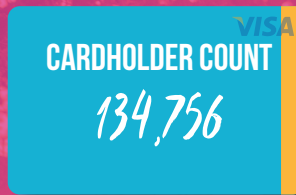
## TOP 5 INTERNATIONAL MARKETS TO SLO CAL (BY CARDHOLDER COUNT)



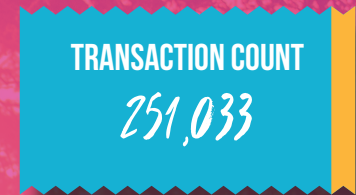
## TOP 5 HIGH-GROWTH INTERNATIONAL TRAVEL MARKETS YOY (BY CARDHOLDER COUNT)



CONSUMER: \$18,877,870  
COMMERCIAL: \$1,754,220

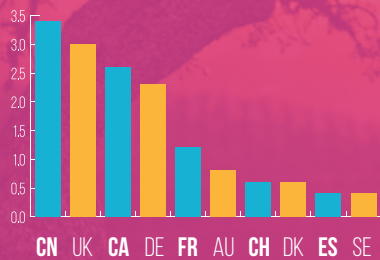


CONSUMER: 130,653  
COMMERCIAL: 4,103

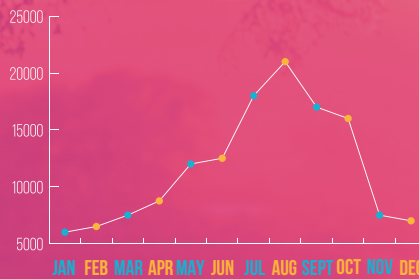


CONSUMER: 241,848  
COMMERCIAL: 9,185

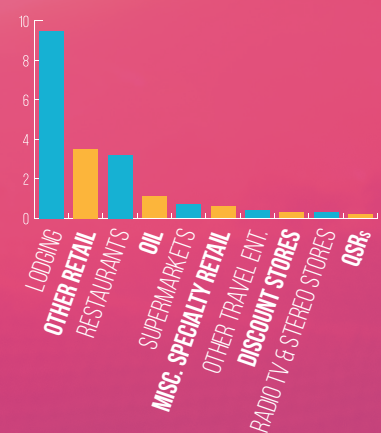
## TOP ORIGINATING COUNTRIES BY SPEND AMOUNT (\$M)



## CARDHOLDER COUNT TREND



## TOP MARKET SEGMENTS BY SPEND AMOUNT (\$M)



### KEY

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



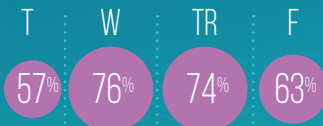
# CONFERENCE CENTER FEASIBILITY STUDY

15-20,000<sup>SQ</sup><sub>FT</sub>  
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

MID-WEEK & SHOULDER SEASON SHOW HIGHEST POTENTIAL

PEAK EVENT TIMING



## 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

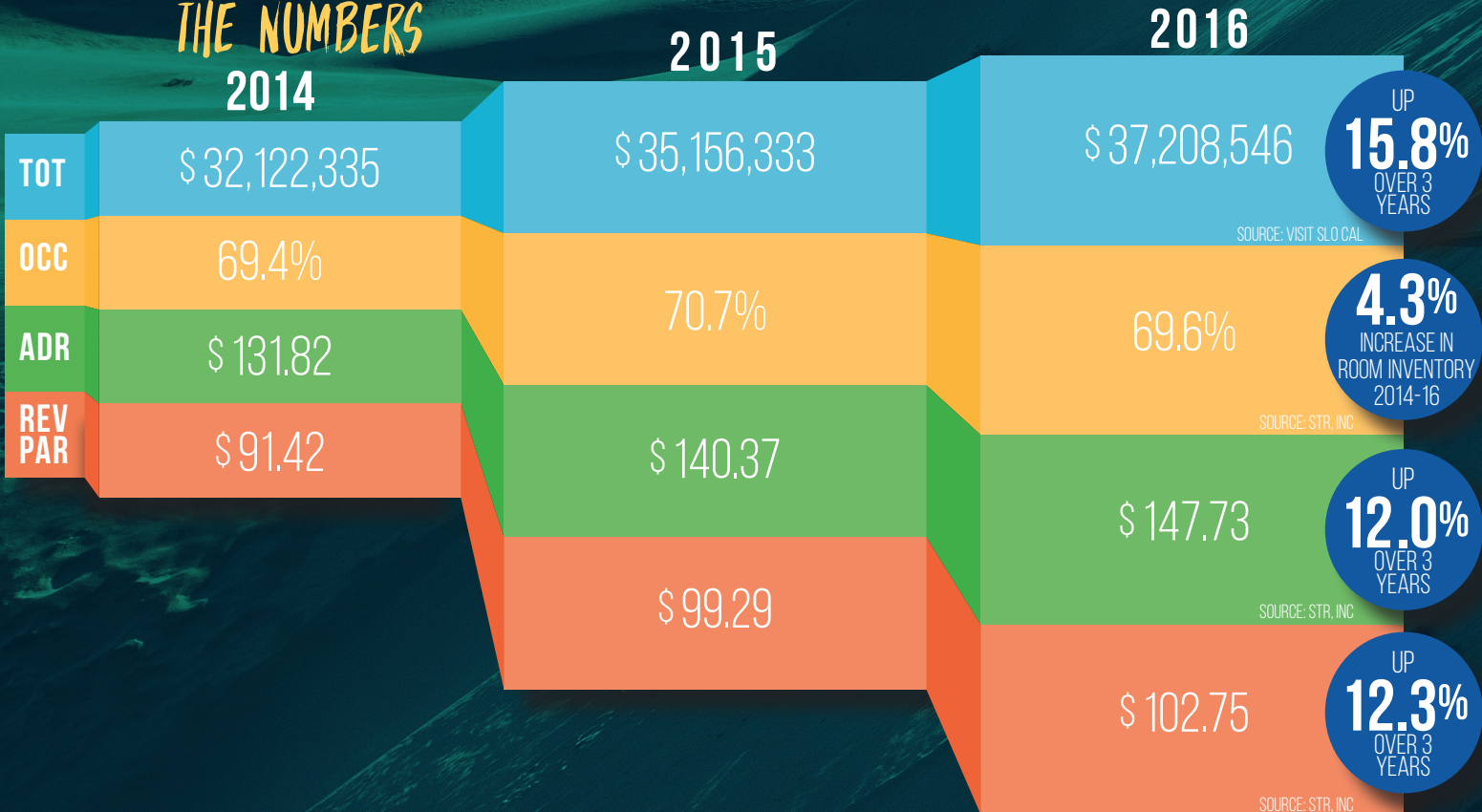
WINE FLIES FREE  
SLO CAL  
Alaska AIRLINES

UNITED AIRLINES

ADDITIONAL FLIGHT SERVICE TO SAN FRANCISCO HAS ALSO BEEN SECURED

IMPERATIVE: DEMONSTRATE VALUE TO OUR STAKEHOLDERS, PARTNERS AND COMMUNITIES

## THE NUMBERS



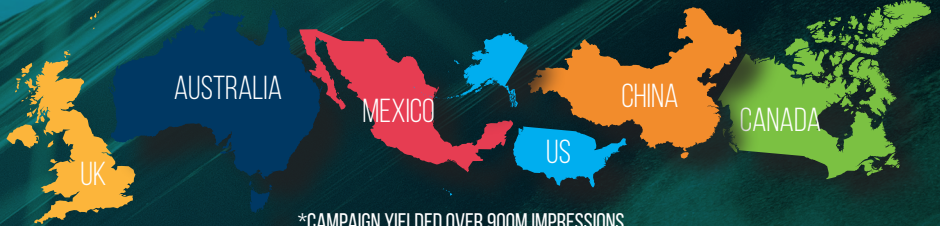


# visit California

*"LIVING THE DREAM"  
TV COMMERCIAL*



SUPPORTED BY PLANNED VCA MEDIA SPEND OF \$26.1M IN FY16/17, DEPLOYED THROUGH BROADCAST AND ONLINE TV CHANNELS IN 6 MARKETS:



\*CAMPAIGN YIELDED OVER 900M IMPRESSIONS

- TRAVEL TRADE: 4 FAMS; 43 REPS HOSTED; \$78M IN BUYING POWER
- MEXICO & CHINA SALES MISSIONS: 65 LEADS; 120 APPOINTMENTS
- MEDIA: 4 PRESS EVENTS IN NEW YORK, CHICAGO, LOS ANGELES, SAN FRANCISCO



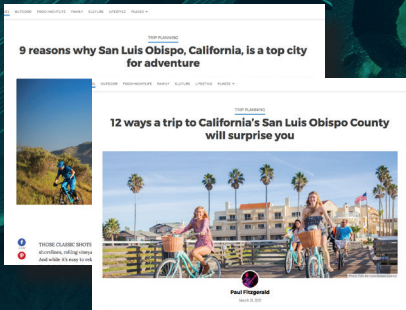
**\$50,000** SPONSORSHIP  
 2 HOURS TV COVERAGE  
 30 SECOND COMMERCIALS  
 ONLINE VIDEO & BANNER ADS



## WEB AND SOCIAL MEDIA RESULTS

## CO-OP MEDIA

### MATADOR network

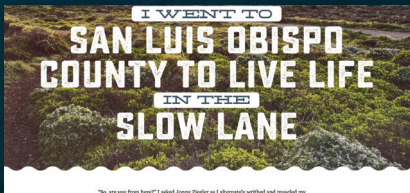


PARTICIPANTS:

MORRO BAY • ARROYO GRANDE  
 ATASCADERO • SAN LUIS OBISPO  
 PISMO BEACH

2 ARTICLES | 5:90 VIDEOS

### BuzzFeed



PARTICIPANTS:

ATASCADERO • PASO ROBLES  
 SAN LUIS OBISPO

*"FORGET NORCAL AND Socal, SLO CAL IS WHERE IT'S AT."*

2 ARTICLES



7 PAGE CO-OP

RAN MAY 2017 IN ALASKA AIRLINES' IN-FLIGHT MAGAZINE





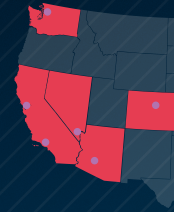
## BRAND AWARENESS



### 6 MARKETS

LOS ANGELES  
SAN FRANCISCO  
SEATTLE

DENVER  
PHOENIX  
LAS VEGAS



### WAVE 1

**1,733**  
COMPLETED SURVEYS

### CRITERIA

HOUSEHOLD INCOME ABOVE  
**\$75,000**

PLAN TO TAKE AT LEAST ONE  
U.S. LEISURE TRIP IN NEXT  
12 MONTHS

AGE: **25 - 54**

### FAMILIARITY WITH SLO CAL

**38% HAVE VISITED  
SLO CAL IN THE PAST  
OF WHICH 92% WOULD  
VISIT AGAIN**

**62% HAVE NOT VISITED  
OF WHICH 72% WOULD BE  
INTERESTED IN VISITING  
SLO CAL**

### LIKELIHOOD TO CONSIDER TRAVELING TO SLO CAL

- 46% OF RESPONDENTS ARE VERY LIKELY TO VISIT SLO CAL IN NEXT 2 YEARS
- 34% ARE SOMEWHAT LIKELY TO CONSIDER VISITING SLO CAL
- TOP TWO REASONS FOR UNLIKELINESS TO VISIT SLO CAL WERE, "DON'T KNOW ENOUGH ABOUT THE AREA" AND "OTHER DESTINATIONS ARE EASIER TO GET TO."

### PERCENT OF RESPONDENTS THAT HAVE NOT VISITED BY MARKET

LOS ANGELES: 50%      SAN FRANCISCO: 51%      SEATTLE: 66%

LAS VEGAS: 71%      PHOENIX: 73%      DENVER: 83%

## ADVERTISING MEDIA

TOTAL WEB TRAFFIC\*  
**1,409,506**

ENGAGED USERS  
**99,267**

CONTENT PAGE VIEWS  
(BUZZFEED & MATADOR)  
**126,076**

COST PER WEIGHTED CONVERSION  
**\$14.72**

ENGAGED USERS CVR  
**7.6%**

ARRIVALS  
**4,460**

COST PER ARRIVAL  
**\$96.23**

COST PER MINUTE OF ENGAGEMENT  
**\$5.17**

\*TOTAL WEB TRAFFIC, NOT JUST PAID MEDIA EFFORTS

## 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

**4 MEDIA EVENTS ATTENDED**  
**85 TOTAL MEDIA MENTIONS**



## CRISIS PLAN

DEVELOPED & DISTRIBUTED  
TRAVELER INFORMATION TOOLS  
TO FRONT LINE STAFF

DEVELOPED ALTERNATE ROUTE MAPS

PROVIDED BLOG &  
SOCIAL MEDIA  
SUPPORT FOR PARTNERS

IN-PERSON OUTREACH INCLUDED:

**112**  
LODGING  
PROPERTIES

**12**  
CHAMBERS & VISITOR  
CENTERS

**MULTIPLE  
MEDIA  
INTERVIEWS**