



CITY OF ATASCADERO
ADVISORY BOARD FOR THE ATASCADERO TOURISM BUSINESS
IMPROVEMENT DISTRICT AGENDA

IN-PERSON MEETING INFORMATION:

The Advisory Board for the Atascadero Tourism Improvement District (ATBID) meeting will be in-person only and members of the public wanting to participate may attend the meeting in-person.

HOW TO SUBMIT PUBLIC COMMENT:

Individuals wishing to provide public comment may attend the meeting in the Club Room on the Fourth Floor of City Hall, 6500 Palma Avenue, Atascadero, CA 93422.

If you wish to comment but not in-person, please email public comments to ATBID@atascadero.org. Such email **comments must identify the Agenda Item Number in the subject line of the email**. The comments will be forwarded to the ATBID Advisory Board and made a part of the administrative record. ***To ensure distribution to the ATBID Advisory Board prior to consideration of the agenda, the public is encouraged to submit comments no later than 12:00 p.m. the day of the meeting. All correspondence will be distributed to the ATBID Advisory Board, posted on the City's website, and be made part of the official public record of the meeting. Please note, email comments will not be read into the record.*** Please be aware that communications sent to the ATBID Advisory Board are public records and are subject to disclosure pursuant to the California Public Records Act and Brown Act unless exempt from disclosure under applicable law. Communications will not be edited for redactions and will be printed as submitted.

AMERICAN DISABILITY ACT ACCOMMODATIONS:

Any member of the public who needs accommodations should contact the City Clerk's Office at cityclerk@atascadero.org or by calling 805-470-3400 at least 48 hours prior to the meeting or time when services are needed. The City will use their best efforts to provide reasonable accommodations to afford as much accessibility as possible while also maintaining public safety in accordance with the City procedure for resolving reasonable accommodation requests.

ATBID Advisory Board agendas and minutes may be viewed on the City's website:

www.atascadero.org/agendas

Copies of the staff reports or other documentation relating to each item of business referred to on the Agenda are on file in the office of the City Clerk and are available for public inspection on our website, www.atascadero.org. Contracts and Resolutions will be allocated a number once they are approved by the ATBID Advisory Board. The Minutes of this meeting will reflect these numbers. All documents submitted by the public during ATBID Advisory Board meetings that are made a part of the record or referred to in their statement will be noted in the Minutes and available for review by contacting the City Clerk's office. All documents will be available for public inspection by appointment during City Hall business hours.



CITY OF ATASCADERO

ADVISORY BOARD FOR THE ATASCADERO TOURISM BUSINESS IMPROVEMENT DISTRICT

AGENDA

Wednesday, February 19, 2025, at 2:30 P.M.
Atascadero City Hall - 6500 Palma Avenue, Club Room
Atascadero, California

CALL TO ORDER:

ROLL CALL:

Chairperson Patricia Harden, SpringHill Suites by Marriott
Vice Chairperson, Tom O'Malley, Portola Inn
Board Member Amar Sohi, Holiday Inn Express & Suites
Board Member Jeffrey Lemus, The Carlton
Board Member, Clint Pearce, Madonna Enterprises

PUBLIC COMMENT: This portion of the meeting is reserved for persons wanting to address the Board on any matter not on this agenda and over which the Board has jurisdiction. Speakers are limited to three minutes. Please state your name for the record before making your presentation. The Board may take-action to direct the staff to place a matter of business on a future agenda.

A. CONSENT CALENDAR:

1. ATBID Board Draft Action Minutes – January 15, 2025, Regular Meeting Minutes

- Recommendation: ATBID Advisory Board approve the January 15, 2025, Regular Meeting Draft Action Minutes. [City]

B. BUSINESS ITEMS:

1. 2024 Atascadero Fall Festival Event Update & 2025 Event Sponsorship Renewal Request

- Fiscal Impact: Up to \$20,000.
- Recommendations: ATBID Advisory Board:
 1. Receive and file recap of marketing results from the November 2024, Fall Fest Event.
 2. Provide staff direction on sponsorship request for the Nov 14-16, 2025, Fall Fest Event. [En Fuego Events]

2. Central Coast Craft Beer Festival 2025 Event Update

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board receive and file the Central Coast Craft Beer Consortium's event update for the Central Coast Craft Beer Festival to be held on March 22, 2025. [En Fuego Events]

3. Tourism Exchange Lodging Forecast – Atascadero

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board receive and file the Tourism Exchange Lodging Forecast Co-op results for Atascadero and SLO County. [SLO CAL]

4. ATBID Advisory Board Review Monthly Meeting Times

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board to discuss and provide staff direction to move meeting times on the 3rd Wednesday of the month from 2:30 -4:30 pm to 1:00 pm – 3:00 pm [City].

5. Budget Reports and Performance Metrics

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board receive and file the Budget Reports and Performance Metrics. [City]

C. COMMITTEE REPORTS:

1. Destination Marketing Services Contract Ad Hoc Committee Report

- Fiscal Impact: Up to \$265,000 Year 1 and up to \$295,000 Year 2.
- Recommendation: ATBID Advisory Board discuss and provide staff direction on next steps following the oral report to the Board [City].

2. Website Ad Hoc Committee Report Update

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board discuss and provide staff direction on next steps following the oral report to the Board [Verdin Marketing].

3. Budget Ad Hoc Committee Report Update

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board discuss and provide staff direction on next steps following the oral report to the Board [City].

D. UPDATES:

1. Visit SLO CAL Board & Marketing Committee Updates. [Visit SLO CAL/Marketing Committee liaisons]
2. Marketing Update. [Verdin Marketing]
3. City Business and Administrative Update. [City Manager's Office]

E. BOARD MEMBER COMMENTS:

F. FUTURE AGENDA ITEMS: (This section set aside for open discussion on future agenda items)

1. Destination Marketing Services RFP Contract Review (March 2025).
2. County update from incoming Supervisor Moreno (March/ April 2025).
3. Jump on the School Bus Fair Transportation Renewal (March 2025).
4. Bring back Vacation Rental/ Short Term Rental discussion for compliance (April 2025).
5. Meet Onsite at the Charles Paddock Zoo & Discuss how revenue coming from the .5% assessment is being used (April 2025)

G. ADJOURNMENT:



**CITY OF ATASCADERO
ADVISORY BOARD FOR THE ATASCADERO TOURISM BUSINESS
IMPROVEMENT DISTRICT AGENDA**

DRAFT MEETING MINUTES

Wednesday, January 16, 2025, at 2:30 P.M.
Atascadero City Hall - 6500 Palma Avenue, Club Room
Atascadero, California

CALL TO ORDER:

Vice Chairperson O'Malley called the meeting to order at 2:30 P.M.

ROLL CALL:

Present: Board Members Clint Pearce and Amar Sohi, and Vice Chairperson Tom O'Malley

Vacant: None

Absent: Board Member Jeffrey Lemus and Chairperson Patricia Harden

Staff Present: Website & Social Media Technician Amanda Muther, City Manager Jim R. Lewis, and Ashley Zamora Recreation Coordinator

PUBLIC COMMENT:

Vice Chairperson O'Malley opened public comment.

The following citizens provided public comment on this item: None.

Vice Chairperson O'Malley closed public comment.

A. CONSENT CALENDAR:

1. ATBID Board Draft Action Minutes – December 4, 2024, Special Meeting Minutes

- Recommendation: ATBID Advisory Board approve the December 4, 2024, Special Meeting Draft Action Minutes. [City]

MOTION BY: Sohi

SECOND BY: Pearce

1. Approve Consent Calendar.

AYES (3): O'Malley, Sohi, Pearce

ABSENT (2): Lemus, Harden

VACANT (0)

Passed 3-0

B. BUSINESS ITEMS:**1. 2024 At Her Table Event Update & 2025 Event Sponsorship Renewal Request**

- Fiscal Impact: Up to \$7,500.
- Recommendations: ATBID Advisory Board:
 1. Receive and file recap of marketing results from the March 2024, At Her Table Events.
 2. Provide staff direction on sponsorship request for the March 9, 2025, At Her Table Street Festival. [At Her Table]

Candice Custodia and Angie Boyd from At Her Table presented the item and answered questions from the Advisory Board. Community Services & Promotions Director Terrie Banish also answered questions from the Advisory Board.

PUBLIC COMMENT:

Vice Chairperson O'Malley opened public comment.

The following citizens provided public comment on this item: None.

Vice Chairperson O'Malley closed public comment.

The marketing results from the March 2024, At Her Table Event were received and filed.

MOTION BY: Sohi

SECOND BY: Pearce

- 1. Approve the marketing sponsorship request for the March 9, 2025, At Her Table Street Festival up to \$7,500.**

AYES (3): O'Malley, Sohi, Pearce

ABSENT (2): Lemus, Harden

VACANT (0)

Passed 3-0

2. Atascadero Chamber of Commerce ATBID Award Sponsorship Opportunity Follow up

- Fiscal Impact: Up to \$2,850.
- Recommendation: ATBID Advisory Board discuss and provide direction to staff regarding participation in Sponsorship Opportunity for the ATBID Award to select "Tourism Partner of the Year." [Chamber of Commerce]

Community Services & Promotions Director Terrie Banish, presented the item on behalf of the Chamber of Commerce and answered questions from the Advisory Board.

PUBLIC COMMENT:

Vice Chairperson O'Malley opened public comment.

The following citizens provided public comment on this item: None.

Vice Chairperson O'Malley closed public comment.

Board Member Pearce advised of a possible conflict of interest due to his ownership of the building that the Chamber of Commerce operates out of.

Board Member Sohi and Vice Chairperson O'Malley were in consensus that the Chamber should reach out directly to the City Manager and ATBID Board Members individually.

3. Quarterly Marketing Report

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board to receive and file Verdin Marketing's Quarterly Marketing Report for Q2 2024. [Verdin Marketing]

Ashlee Akers from Verdin Marketing provided the November 2024 Quarterly Marketing Report for Q2 2024. (Exhibit A), presented the item and answered questions from the Advisory Board. Marketing Consultant Akers advised that in light of the fires in Southern California, Verdin has paused its marketing efforts in the Los Angeles area and has begun sharing posts with information supporting the emergency response efforts.

PUBLIC COMMENT:

Vice Chairperson O'Malley opened public comment.

The following citizens provided public comment on this item: None.

Vice Chairperson O'Malley closed public comment.

The Board received and filed the Marketing's Quarterly Marketing Report for Q2 2024.

4. Atascadero Tourism Business Improvement District (ATBID) Lodging Owner Nomination Process for Board Members

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board discuss and provide staff direction regarding current lodging owners nomination process and makeup of the Board for 2-Year Terms. [City]

Community Services & Promotions Director Terrie Banish and City Manager Jim Lewis, presented the item and answered questions from the Advisory Board.

PUBLIC COMMENT:

Vice Chairperson O'Malley opened public comment

The following citizens provided public comment on this item: None.

Vice Chairperson O'Malley closed public comment.

There was consensus among the Board Members present to direct staff to bring a revised nomination process regarding the ATBID's Board configuration to the Council for approval. The recommendations for the new process and configuration are as follows:

- Four Board Member positions to be filled by hoteliers in a commercial zone with 25 rooms or more.
- One Board Member position to be filled by a Vacation Rental, B&B, or Short-Term Rental.

5. Destination Marketing Services Contract Extension & “Request for Proposal” Criteria

- Fiscal Impact: Up to \$79,508 to complete the budget year.
- Recommendations: ATBID Advisory Board:
 1. Extend the current Verdin Destination Marketing Services contract from March 10, 2025, to June 30, 2025, to allow for the completion of the FY 24-25 budget cycle.
 2. Review and provide staff direction to approve “Request for Proposal” investment amounts and move forward with the RFP process.
 3. Assign an Ad Hoc Committee to review proposals. [City]

Community Services & Promotions Director Terrie Banish presented the item and answered questions from the Advisory Board. Ashlee Akers from Verdin Marketing also answered questions from the Advisory Board.

PUBLIC COMMENT:

Vice Chairperson O’Malley opened public comment

The following citizens provided public comment on this item: Matt

Vice Chairperson O’Malley closed public comment.

MOTION BY: Pearce

SECOND BY: Sohi

1. Approve extending the current Verdin Destination Marketing Services contract from March 10, 2025, to June 30, 2025

AYES (3): O’Malley, Sohi, Pearce

ABSENT (2): Harden, Lemus

VACANT (0)

Passed 3-0

There was consensus among the Board Members present to have staff move forward with the RFP process for destination marketing services using the amounts included in the staff report.

Vice Chairperson O’Malley assigned an Ad Hoc Committee for the review of RFP proposals for destination marketing services once received. Vice Chairperson O’Malley assigned Board Members Pearce and Sohi to be on the committee, asking that they be available to be called upon for feedback when the time comes.

6. Budget Reports and Performance Metrics

- Fiscal Impact: None.
- 4. Recommendation: ATBID Advisory Board receive and file the Budget Reports and Performance Metrics. [City]

Community Services & Promotions Director Terrie Banish presented the item and answered questions from the Advisory Board.

PUBLIC COMMENT:

Vice Chairperson O’Malley opened public comment.

The following citizens provided public comment on this item: None.

Vice Chairperson O'Malley closed public comment.

The budget reports and performance metrics were received and filed.

C. COMMITTEE REPORTS:

1. Website Ad Hoc Committee Report Update

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board discuss and provide staff direction on next steps following the oral report to the Board.

Marketing Consultant Ashlee Akers provided a brief recap of the recent Visit Atascadero website refresh meeting and advised on next steps.

PUBLIC COMMENT:

Vice Chairperson O'Malley opened public comment.

The following citizens provided public comment on this item: None.

Vice Chairperson O'Malley closed public comment.

2. Budget Ad Hoc Committee Report Update

- Fiscal Impact: None.
- Recommendation: ATBID Advisory Board to discuss and provide staff direction on budget items and next steps following the oral report to the Board.

Board Member Sohi and O'Malley had no updates.

PUBLIC COMMENT:

Chairperson Harden opened public comment.

The following citizens provided public comment on this item: None.

Chairperson Harden closed public comment.

D. UPDATES:

1. Visit SLO CAL Board and Marketing Committee Updates – Community Services & Promotions Director Terrie Banish, Marketing Consultant Ashlee Akers, and Matt Halvorson with Visit SLO Cal provided brief updates.
2. Marketing Update- None
3. City Business and Administrative Update- Community Services & Promotions Director Terrie Banish provided a brief update.

E. BOARD MEMBER COMMENTS:

None.

F. FUTURE AGENDA ITEMS: (This section set aside for open discussion on future agenda items)

1. Destination Marketing Services RFP Contract Review (April 2025).
2. County update from incoming Supervisor Moreno (March 2025).
3. Atascadero Fall Festival - Event Recap 2024 & 2025 Renewal (February/ March 2025).
4. Jump on the School Bus Fair Transportation Renewal (March 2025).

The Advisory Board requested the following additions to the Future Agenda Items list:

- STR Rental discuss for compliance (February 2025)
- Lodging Forecast (February 2025)
- Adjusting TBID meeting time to 1:30-3:30pm (February 2025)
- Onsite Zoo meeting regarding use of ATBID revenue (April-March 2025)

G. ADJOURNMENT:

Vice Chairperson O'Malley adjourned the meeting at 4:27 P.M.

MINUTES PREPARED BY:

Ashley Zamora
Recreation Coordinator

APPROVED:

Exhibit A: **November 2024** Quarterly Marketing Report for Q2 2024



Community Performance Report

San Luis Obispo County, November 2024

Hotel
Performance

San Luis Obispo County hotels in November reported gains in all key metrics, with exception to a 1.4% decrease in supply. Growth in demand (+0.8%) and ADR (+3.9%) supported revenue of \$33.7M to increase 4.7% YOY, which combined with the supply dip, produced \$111 in RevPAR, up 6.2%. Community hotel performance was led in occupancy by San Luis Obispo City (66.8%). Most communities reported gains to occupancy (SLO City with the highest gain, +6.7%), while five decreased (Cambria the most, -2.5%). Only one reported a revenue decrease (Atascadero, -8.2%). Comp set hotel metrics were nearly resoundingly positive - all gained in occupancy (Santa Barbara County the most, +4.2%), demand (Santa Barbara the most, +3.6%), and revenue (Monterey the most, +8.2%). ADR growth was highest in Monterey County, followed by SLO County (+3.9%), and Santa Barbara County (+1.6%).

TOT
Revenue

TOT for October reached \$4.8M, down 3.6% YOY. Grover Beach notably reported a 22.7% gain YOY, and Paso Robles inched ahead 0.3%. Other communities reported decreases YOY, with the largest TOT reporting from Unincorporated Areas (\$1.2M) down 0.7%, followed by Pismo Beach (\$1.2M) down 6.1%.

Visitor
Arrivals

Visitors to San Luis Obispo County in 2024 Q3 (FY 2025 Q1) were 2.3M, down 0.4% from the same quarter one year ago. International visitors grew 1.7% YOY, but other visitor categories declined slightly: day (-0.7%), overnight (-0.2%), and domestic (-0.4%). This was the second consecutive quarter for estimated decreases to domestic, day, and overnight visitation.

Previous
Quarter

Spending for 2024 Q3 reached \$280.6M, down 1.4% from one year ago. The top origin markets were all domestic, led by Santa Maria-Santa Barbara (\$41.1M), Los Angeles (\$36.3M), Fresno (\$21.5M), and San Francisco (\$19.5M). Domestic visitor spend decreased 1.4% YOY, while international visitor spend was nearly level at -0.1%. Restaurants and Dining led domestic spending categories at \$87.3M (-1.4% YOY). Categories which saw growth YOY were Hotels & Lodging (+9.2%), and Other (+6.2%).



187.3K

Hotel Demand

▲ 0.8% YOY - Monthly



\$4,782,061

Transient Occupancy Tax

▼ -3.6% YOY - Monthly



\$280.6M

Total Spending for 2024 Q3

▼ -1.4% YOY - Quarterly



2.3M

Visitors for 2024 Q3

▼ -0.4% YOY - Quarterly

Source: CoStar Group, STR, LLC. Republication or other reuse of this data without the express written permission of STR, LLC is strictly prohibited. ©Visit SLO CAL, VisaVue, Tourism Economics



Community Lodging

San Luis Obispo County, November 2024

Date November 2024 Location Atascadero, CA % Change YOY Report Monthly Based On Fiscal

Atascadero, CA Hotel Performance - Monthly

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
61.1%	\$144	\$88	16.3K	9.9K	\$1.4M
▲ 0.9%	▲ 3.5%	▲ 4.5%	▼ -12.2%	▼ -11.3%	▼ -8.2%
YOY					

Transient Occupancy Tax Revenue

October 2024 - Monthly

\$4,782,061
San Luis Obispo County
▼ -3.6% YOY

Hotel Performance by Community

November 2024 - Monthly

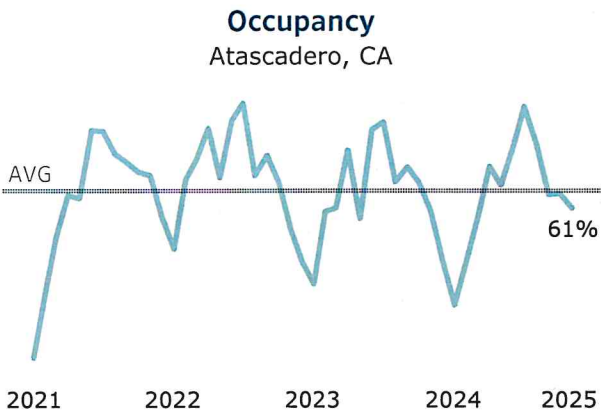
	Occupancy	ADR	RevPAR
Atascadero, CA	61.1%	\$144	\$88
Cambria, CA	58.6%	\$204	\$119
Five Cities	59.9%	\$207	\$124
Morro Bay, CA	57.7%	\$139	\$80
North Coast	55.2%	\$168	\$93
North County	64.3%	\$183	\$118
Paso Robles, CA	65.6%	\$198	\$130
Pismo Beach, CA	60.1%	\$211	\$126
San Luis Obispo County	61.5%	\$180	\$111
San Luis Obispo, CA	66.8%	\$171	\$114
San Simeon, CA	49.9%	\$126	\$63
South County	63.0%	\$190	\$120

Transient Occupancy Tax

Monthly, % Change YOY

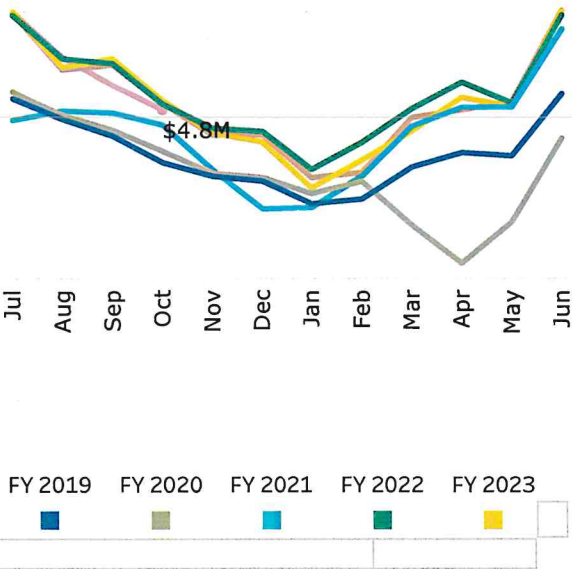
Unincorporated	1,208,409, ▼ -0.7%
Pismo Beach	1,186,913, ▼ -6.1%
Paso Robles	930,617, ▲ 0.3%
San Luis Obispo	915,901, ▼ -6.5%
Morro Bay	321,956, ▼ -11.7%
Arroyo Grande	114,556, ▼ -7.2%
Grover Beach	103,709, ▲ 22.7%

Occupancy



Transient Occupancy Tax

San Luis Obispo County
Total - Fiscal Year



Source: CoStar Group, STR, LLC. Republication or other reuse of this data without the express written permission of STR, LLC is strictly prohibited. ©Visit SLO CAL



Lodging Summary - Hotels and Short Term Rentals

San Luis Obispo County, November 2024

Date	November 2024	STR	Atascadero, CA	AirDNA	Atascadero	Based On	Fiscal	YOY Change	YOY
Aggregate Lodging									
		Occupancy	ADR	RevPAR	Supply	Demand	Revenue		
		55.0%	\$188.15	\$103.39	22.7K	12.5K	\$2.4M		
	YOY	▲ 0.5%	▲ 8.4%	▲ 8.9%	▼ -9.6%	▼ -9.2%	▼ -1.6%		
	YTD Fiscal	61.3%	\$195.88	\$120.00	124.5K	76.3K	\$14.9M		
	YTD YOY	▼ -0.2%	▲ 3.3%	▲ 3.1%	▼ -2.5%	▼ -2.7%	▲ 0.5%		
Hotels: Atascadero, CA									
		61.1%	\$143.55	\$87.74	16.3K	9.9K	\$1.4M		
	YOY	▲ 0.9%	▲ 3.5%	▲ 4.5%	▼ -12.2%	▼ -11.3%	▼ -8.2%		
	YTD Fiscal	68.9%	\$152.51	\$105.08	89.8K	61.9K	\$9.4M		
	YTD YOY	▲ 1.5%	▼ -0.3%	▲ 1.1%	▼ -4.8%	▼ -3.5%	▼ -3.8%		
Short Term Rentals: Atascadero									
		39.4%	\$361.66	\$142.67	6.5K	2.6K	\$924.0K		
	YOY	▼ -2.1%	▲ 10.5%	▲ 13.8%	▼ -2.6%	▲ 0.2%	▲ 10.8%		
	YTD Fiscal	41.5%	\$382.58	\$158.64	34.7K	14.4K	\$5.5M		
	YTD YOY	▼ -3.2%	▲ 8.0%	▲ 4.5%	▲ 4.0%	▲ 0.7%	▲ 8.7%		

Lodging Revenue & Contribution

Atascadero, CA (Hotels) and Atascadero (Short Term Rentals)

% Share Short Term Rentals
Aggregate Revenue

Source: CoStar Group, STR, LLC. Reproduction or other reuse of this data without the express written permission of STR, LLC is strictly prohibited. ©Visit SLO CAL ; AirDNA (Listing Type = Entire Place, Private Rooms, Shared Rooms, Hotel Rooms, and Not Reported). Short Term Rental data includes all active, 30-day or less rentals regardless of license status and/or collection or payment of T.. SYMPHONY TOURISM ECONOMICS



Monthly Visitation

San Luis Obispo County, November 2024

Date: November 2024 Report: Monthly Based On: Fiscal



72.9%
Repeat Share



1.9 Days
Avg Trip Duration



78.2%
Overnight Visitors

Top 15 Points of Interest

November 2024 - Monthly

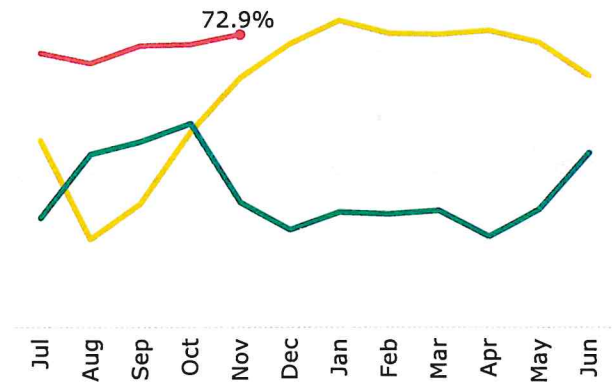
	% Overnight	% Repeat	% Share of Total
San Luis Obispo	77.3%	66.1%	22.7%
City Of Pismo Beach	76.3%	69.6%	21.9%
Pismo Beach	76.4%	69.6%	21.6%
Paso Robles	72.5%	66.2%	17.7%
Morro Bay	79.8%	70.4%	11.6%
Atascadero	72.6%	65.4%	9.7%
46 East Paso Wine Country	61.6%	57.4%	8.5%
Arroyo Grande	80.0%	67.7%	8.4%
Grover Beach	81.8%	66.0%	6.0%
Cambria	80.1%	65.5%	5.7%
Nipomo	72.9%	67.2%	4.9%
Templeton	71.6%	62.7%	4.5%
46 West Paso Wine Country	76.5%	59.4%	3.8%
Avila Beach	79.5%	58.2%	3.6%
Downtown San Luis Obispo			0.0%

Top 10 Domestic Origin Markets

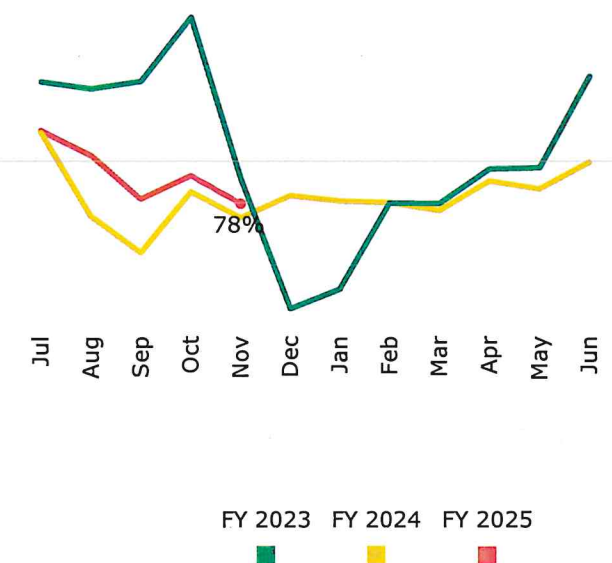
November 2024 - Monthly, % Share of Trips

Los Angeles, CA	20.4%
Fresno-Visalia, CA	18.5%
San Francisco-Oakland-San Jose, CA	12.7%
Bakersfield, CA	9.4%
Sacramento-Stockton-Modesto, CA	7.7%
Monterey-Salinas, CA	4.0%
San Diego, CA	3.8%
Palm Springs, CA	2.6%
Santa Barbara-Santa Maria, CA	2.1%
Phoenix, AZ	1.8%

Share of Repeat Visits to SLO County



Share of Overnight Visits to SLO County



Source: Azira

SYMPHONY TOURISM ECONOMICS



Community Cross-Visitation

Atascadero, November 2024

Date

November 2024

Report

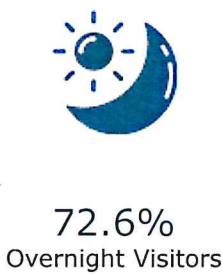
Monthly

Based On

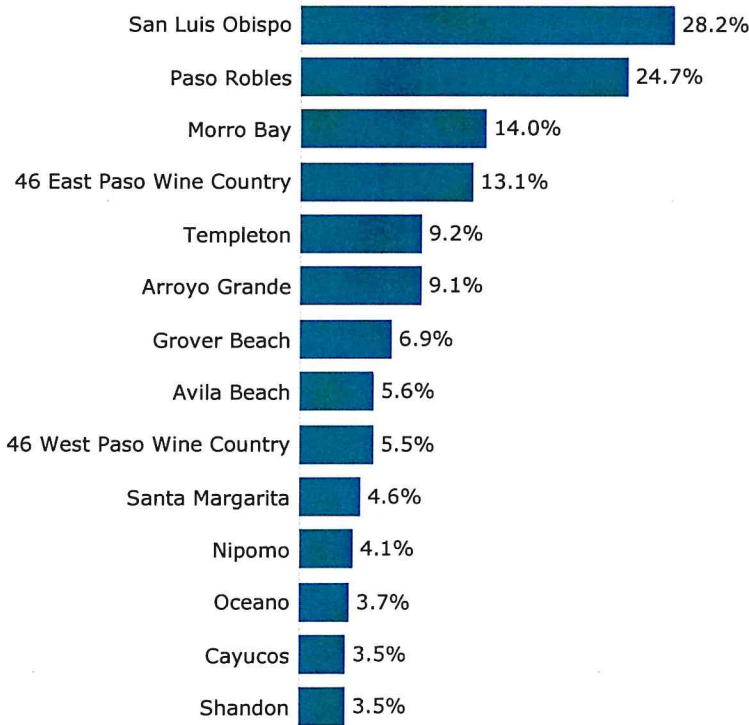
Fiscal

Primary

Atascadero

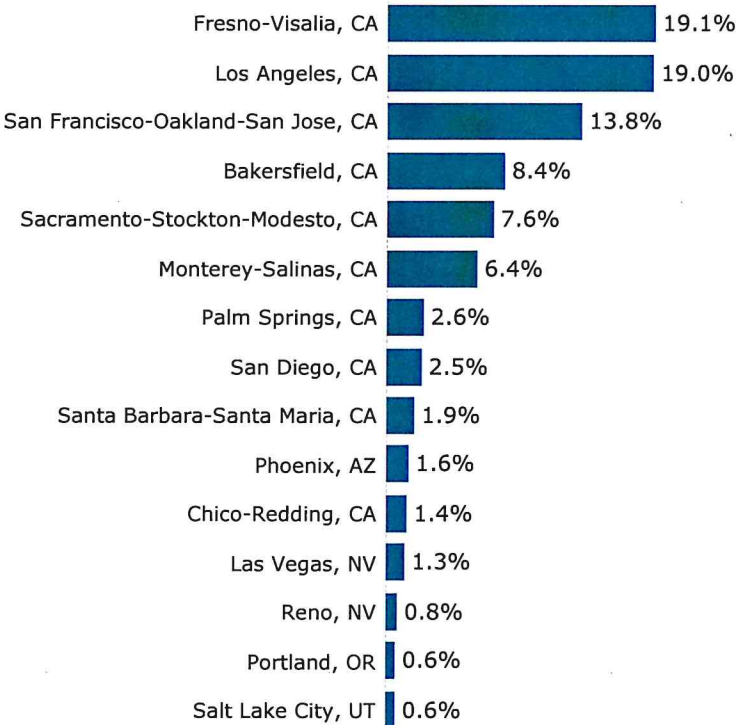


Top Cross-Visited Communities
From Atascadero



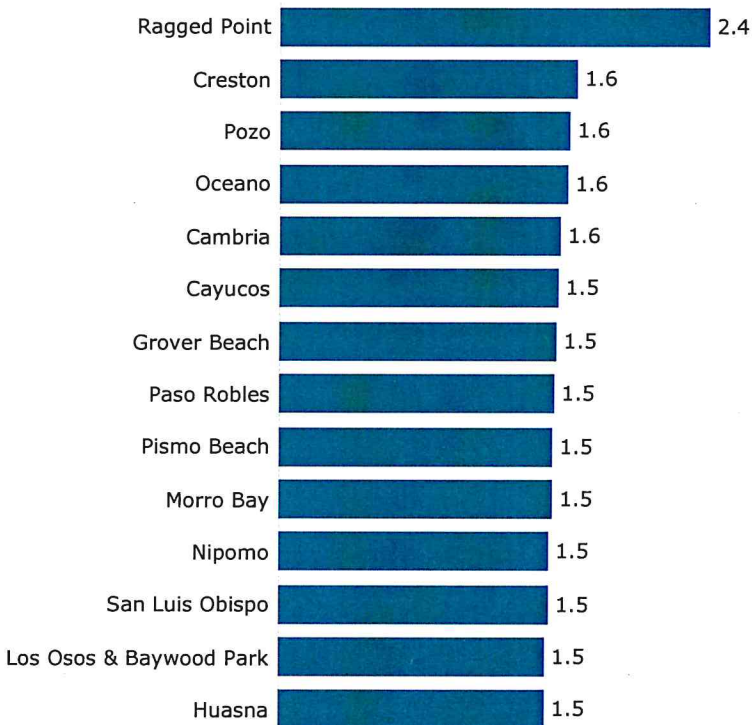
Communities visited by those starting their trip in Atascadero

Top Origin Markets
Primary Community Visited: Atascadero



Origin markets of those starting their trip in Atascadero who cross-visited elsewhere

Top Average Communities Visited per Trip
All Community Visitors



Average number of communities visited per trip during November 2024 (Month)

Source: Azira



Quarterly Spending and Visits

San Luis Obispo County, November 2024

Period Ending
2024 Q3

Report
Quarterly

Based On
Fiscal

Atascadero, CA Hotel Performance

July - September 2024

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
72.6%	\$155	\$113	56.8K	41.2K	\$6.4M

Transient Occupancy Tax Revenue

July - September 2024

\$19,246,839

Top 10 Domestic Origin Markets

July - September 2024, % Share of Trips

Los Angeles, CA	19.0%
Fresno-Visalia, CA	17.9%
San Francisco-Oakland-San Jo..	11.7%
Bakersfield, CA	9.1%
Sacramento-Stockton-Modesto..	7.2%
Monterey-Salinas, CA	3.6%
San Diego, CA	3.5%
Palm Springs, CA	2.4%
Santa Barbara-Santa Maria, CA	1.9%
Phoenix, AZ	1.7%

Top 10 Origin Markets by Air

July - September 2024, % Share of Total

Phoenix	9.2%
San Diego	8.7%
Seattle	8.6%
International	7.6%
Portland	5.6%
Denver	5.0%
San Francisco	4.6%
Los Angeles (US) CA	3.7%
Dallas	2.6%
New York	2.0%

Domestic Visitor Spending*

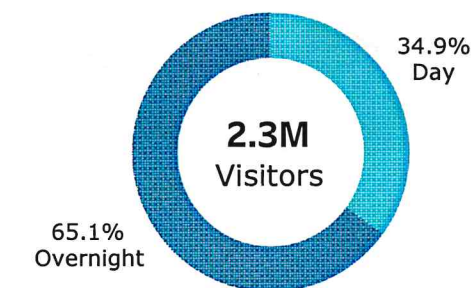
July - September 2024, % Share of Spending

Restaurants	24.9%
Lodging	14.0%
Grocery Stores/Supermarkets	7.7%
Automated Fuel Dispensers	7.4%
Fast Food Restaurants	5.1%
Wholesale Clubs	3.1%
Discount Stores	2.3%
Pkg Stores/Beer/Wine/Liquor	2.2%
Bars/Taverns/Lounges/Disco	2.1%
Service Stations	1.9%

*Excluding Residents

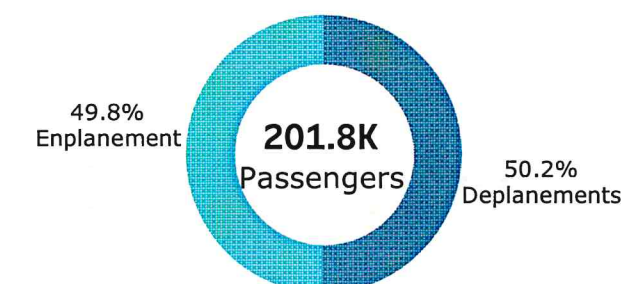
Total Visitation

July - September 2024
% Share of Trips



Airport Deplanements & Enplanement

July - September 2024
SLO CAL Regional Airport





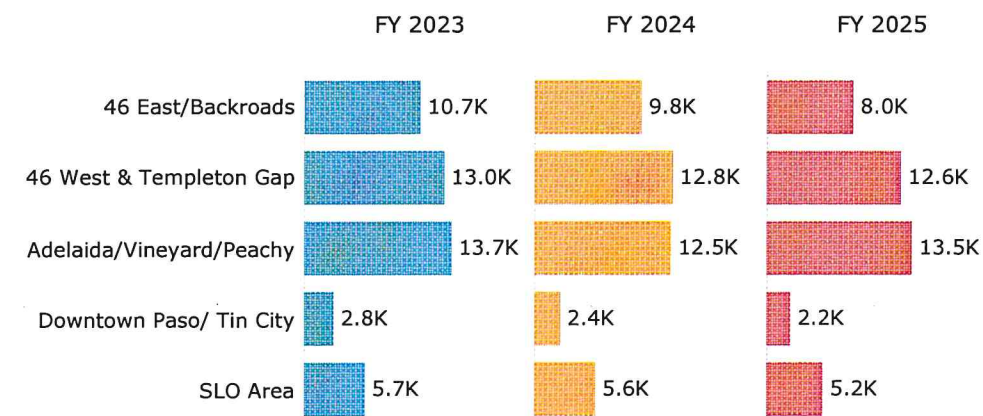
Community Benchmark Wineries

San Luis Obispo County, November 2024

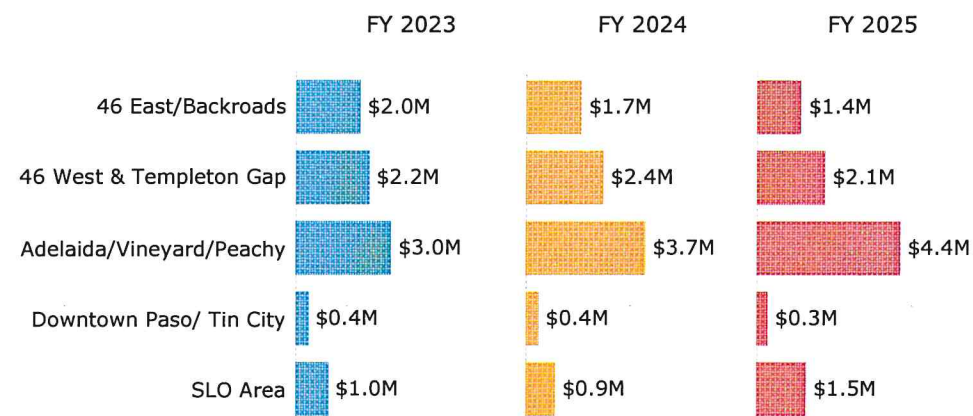
Date: November 2024 % Change: YOY Report: Monthly Based On: Fiscal Region: All

Visitors	Tasting Room Sales	DTC Total Sales	On-Site Event Sales	Avg Visitors	Avg Tasting Room Sales	Avg DTC Total Sales	Avg On-Site Event Sales
0.18M	\$22.8M	\$92.3M	\$1.03M	883	113,845	459,333	10,143
▼ -1.9%	▼ -4.9%	▲ 2.9%	▼ -37.7%	▼ -1.9%	▼ -4.9%	▲ 2.9%	▼ -37.7%
YOY				YOY			

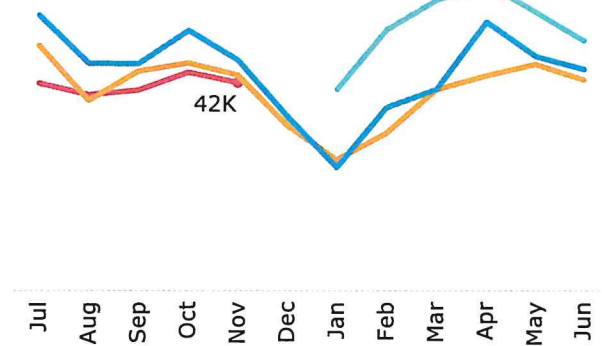
SLO CAL Region Visitation by Year
November 2024 - Monthly



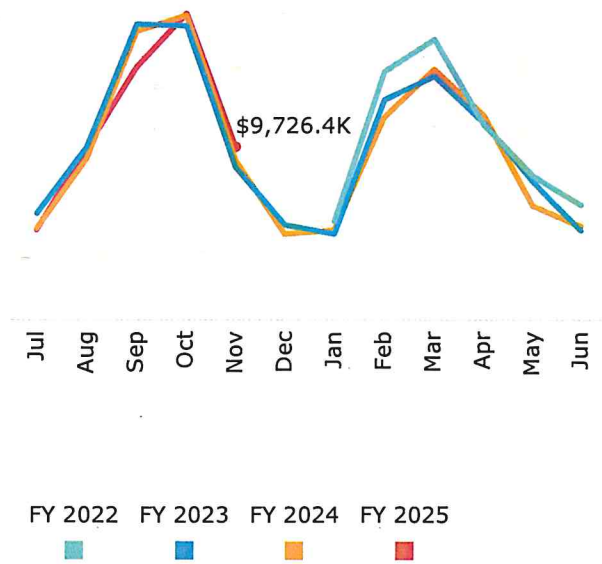
Average DTC Sales by Region
November 2024 - Monthly



Total Visitors



Total DTC Sales



Source: Community Benchmark

SYMPHONY TOURISM ECONOMICS



CITY OF ATASCADERO

ADVISORY BOARD FOR THE ATASCADERO TOURISM BUSINESS IMPROVEMENT DISTRICT STAFF REPORT

Item B1

2/19/25

2024 Atascadero Fall Festival Event Update & 2025 Event Sponsorship Renewal Request

RECOMMENDATIONS:

ATBID Advisory Board:

1. Receive and file recap of marketing results from the November 2024 Atascadero Fall Festival.
2. Provide staff direction on the sponsorship renewal request for the November 2025 Atascadero Fall Festival.

DISCUSSION:

The Atascadero Fall Festival was held in the Sunken Gardens on November 15 through November 17, 2024, with a variety of musical entertainment, from local community entertainment to major bands, like The Molly Ringwald Project. The event included carnival rides, games, food vendors, a craft beer event on Saturday, merchandise vendors, and more. The event created a fantastic backdrop shared among many across social media. Even though the weather was not favorable, this family-fun event still did its magic to create many memories for those who attended.

En Fuego Events will provide an oral presentation to the ATBID Advisory Board that includes the marketing dollars invested, the number of people that attended the event, and where they came from as a result of Atascadero Fall Fest 2024. In addition, En Fuego Events has included a special event sponsorship request to bring the event back in 2025.

Event sponsorship history: 2021 awarded \$5,000 sponsorship. 2022 awarded \$20,000 sponsorship (\$10,000 request and increased due to a multi-day event). \$10,000 paid 2021/22; \$10,000 paid 2022/23; 2023 awarded \$20,000 sponsorship; 2024 awarded \$20,000 sponsorship.

FISCAL IMPACT:

Up to \$20,000.

ATTACHMENT:

1. Event Support Application – Atascadero Fall Fest 2025
2. November 2024 STR Report



The Atascadero Tourism Business Improvement District (TBID) was established to promote Atascadero as an overnight destination. The mission of the Atascadero TBID is to encourage visitors to discover what makes Atascadero a simply genuine travel destination resulting in increased revenue for the local community.

We appreciate the efforts of community partners to design events that attract visitors to Atascadero and would like to offer our support of those events that align themselves with the Visit Atascadero mission. A portion of the TBID annual budget and regular marketing efforts are set aside each year to help maximize the effect of these efforts. If you would like to be considered for support, please complete the following application. **The application must be received at least 6 months in advance of the funding deadline to request support from the Atascadero TBID.** Unfortunately, we are unable to provide assistance for all events, but please know each request will be considered thoroughly.

Our Mission: Encourage overnight travel to experience Atascadero's beautiful and authentic outdoor recreation, culinary adventures, and welcoming hospitality.

In order to qualify for event sponsorship, your organization must meet the following requirements or provide a three-year plan detailing how you will ultimately meet these requirements:

1. Support the Visit Atascadero mission
2. Attract visitors from outside San Luis Obispo County
3. Encourage overnight stays of one night or more
4. Obtain the necessary ABC permits, law enforcement approval, city permits, safety guidelines, and any additional documents needed for the event
5. Provide a detailed event budget and marketing plan
6. Provide post-event metrics which show positive effect on Atascadero tourism

In addition to these requirements, ATBID Board will consider the following factors:

1. Does event support Visit Atascadero objectives?
2. Will event be held during off-season (January – March)?
3. Is event new or existing? If existing, how was previously awarded money spent?
4. What is the three-year growth plan for the event?
5. Is there statistical data on the demographic status of your attendees or targeted attendees?
6. Can the organization prove complete fiduciary responsibility of all event expenses?
7. Do your event organizers and attendees garner influence and have the ability to promote Atascadero tourism?

Please submit application and all additional documents by email to Hanna Meisinger at hmeis@bigredmktg.com in PDF format. You will receive a confirmation that we have received the application. Typically, we ask that event planners attend a Board Meeting to present their event to the Board which provides an opportunity to ask questions. Atascadero TBID Board Meetings are regularly scheduled for the third Wednesday of the month at 2:30 p.m. at City Hall. The vote regarding funding often takes place at the meeting following the event presentation.



Event Sponsorship Requirements Checklist

The following requirements must ALL be met in order to qualify for sponsorship and receive funding. Please be sure to carefully read and submit all necessary documentation and information.

- ☐ Complete application and submit at least 6 months prior to event
- ☐ Include requested sponsorship amount in application
- ☐ Select eligible event tier and describe how your event meets qualification
- ☐ Provide event budget with line items detailing how sponsorship funding will be used
- ☐ Provide a detailed marketing plan
- ☐ Include a financial statement from your organization – applicant must be able to demonstrate financial accountability for event expenses
- ☐ Describe all sources of event income and additional sponsorships that have been secured
- ☐ If requested, attend an ATBID Board Meeting to provide event presentation
- ☐ If awarded event sponsorship funding, plan to attend two ATBID Board Meetings:
 - Provide planning progress update at least two months prior to event
 - Provide an event recap detailing attendance, marketing efforts and results, impact on Atascadero tourism and future plans.



Event Support Application Form

Requesting Organization: ___En Fuego Events_____

Contact: ___Andres Nuno___ **Phone Number:** ___805-448-7070___

Email: ___andres@enfuegoevents.com___ **Mailing Address:** 1072 Casitas Pass Rd. #232

City, State, Zip: ___Carpinteria, CA 93013_____

Name of Event: ___Atascadero Fall Festival 2025_____

Event Description: _____ The Atascadero Fall Festival is a 3-day, free admission event that is "Fun for the Whole Family." It features carnival games and rides, 40+ bands on 2 stages, and over 60 street faire and food vendors.

Event Dates/Times: _____Friday, Nov. 14th – Sunday, Nov. 16th, 2025___Friday: 4-10 pm
/ Saturday & Sunday: 12 pm – 10 pm___

Is event located in Atascadero? Yes

Venue Name: ___Sunken Gardens_____

Venue Location: ___Downtown Atascadero_____

Event Website: ___www.AtascaderoFallFest.com_____

Are you receiving in-kind or financial support from the City of Atascadero?

Yes

Total Anticipated Attendees: ___20,000 over 3 days___

Portion From Outside SLO County: ___35_%

Is this the first year the event will take place? No

If this event has taken place previously, please provide historical data including attendance numbers: ____ We had our best turnout in 2024 with over 20,000 guests over 3 days, including our highest number of vendors. This has quickly become a can't miss event in San Luis Obispo County and we are looking forward to exploring NEW ways to market this event to make it even bigger in 2025!

Are tickets sold for your event? If so, please provide the price per ticket and any package opportunities.

____ This is a free admission event. _____

Crowd Control Safety Plan Details: ____ We will work with a licensed and insured security company that has worked large events in California.

Will the event require an ABC Permit? Yes ☐

Has a City permit been issued for your event or contracted the venue for your event date? Yes

Describe how the event supports Visit Atascadero's mission and goals: The Atascadero Fall Festival is able to attract guests from all over California to join us at a free admission, 3-day event that includes a little bit of something for everyone. The Atascadero Fall Festival is an event that locals, and travelers, enjoyed and will mark on their calendars for years to come.

Select eligible event tier for your event (eligibility is based on one or more qualifying factors and additional considerations):



- Attracts 1,500+ attendees
 - At least 35-40% of target market is out-of-town visitors
 - Marketing campaigns reach at least 1,000 subscribers
 - Event encourages multi-night stay in Atascadero
- Page 21 of 87
- Total Support =
Up to \$10,000

X ☐

☐

☐

Additional details about eligible event tier qualification:

_____ In 2024, we topped 20,000 guests and the Atascadero Fall Fest was a must visit event. The entire community was proud of the Atascadero Fall Festival and the we saw an increase of local businesses and nonprofit groups participating this year. We believe that the Atascadero Fall Fest has already left a lasting impression and will continue to grow in popularity.

Support Request (desired monetary amount or in-kind marketing support):

We have received \$20,000 in funding from ATBID for the past several years and it was a tremendous help in putting the Fall Fest on. In 2024, with the event growing, as well as inflation, our budget increased to over \$150,000. This signature event has already become one of the top events not only in San Luis Obispo County, but throughout the Central Coast.

We were recently named 2024 Best of North SLO County “Best Family-Friendly Event” by the Paso Robles Press, Atascadero News, Paso Robles Magazine and Atascadero Magazine.

We are also hoping to work with Visit SLO Cal to come up with creative ways

With the increase in our budget, and to continue to keep this a free admission event, we would not be able to put on the Atascadero Fall Fest without the \$20,000 funding from ATBID.

We continue to promise to give the City of Atascadero this exclusive event that will not be duplicated by En Fuego Events anywhere in San Luis Obispo County.

Detail how awarded funding will be utilized, include any in-kind or additional support provided by Visit Atascadero (feel free to attach additional sheets as needed).

Event Item	Amount
<i>Ex. Social Media Ads</i>	<i>\$2,000</i>
New Times	\$2,500
Atascadero News / Paso Robles Press	
American General Media	\$2,500
Social Media	\$1,000
Banners & Posters	\$1,000
Television	\$750
Streaming Advertising	\$1,000

Please include all sources of income that have been secured and those that are being solicited to support event (feel free to attach additional sheets as needed).

Income Source	Amount
Visit Atascadero	\$20,000

SpringHill Suites	\$1,500 + Trade
Holiday Inn Express	Trade
The Carlton	Trade
Firestone Walker Brewing Co.	In-Kind Donation
Cali Squeeze Seltzer	In-Kind Donation
Wild Fields Brewhouse	In-Kind Donation
Ruby Cellars	In-Kind Donation
Topa Topa Brewing Co.	In-Kind Donation
Figueroa Mountain Brewing Co.	In-Kind Donation

Please describe your paid advertising and the outlets you plan to utilize. Include the amount you plan to spend with each outlet or provide a copy of your marketing plan.

Media Outlet & Geographic Location of advertising	Type & Frequency	Cost of Advertising
New Times	Print / Weekly	\$2,000
Atascadero News / Paso Robles Press	Print / Weekly	\$1,000
American General Media	2 Weeks	\$1,000
Visit SLO Cal	NA	Sponsorship
Streaming	4 Weeks	\$1,000
Social Media	8 Weeks	\$1,000
Television	4 Weeks	

Please share your intended public relations outreach.

_____ We will send out several Press Releases that include information about the overall event, our entertainment schedule and other happenings.

How will your organization recognize Visit Atascadero's support (including but not limited to promotional materials, website, and at the event)?

_____ All marketing material will include the Visit Atascadero logo, including posters, social media content and we will continue to call our main stage the Visit Atascadero Main Stage and have your banner hanging on it. This is the premier banner location that the Atascadero Fall Fest has to offer.

What opportunities do you plan to offer that specifically promote lodging in Atascadero?

_____ We have 3 lodging partners in place for 2025, The Holiday Inn Express, SpringHill Suites and The Carlton. _____

Additional Details: _____ Our footprint will stay the same in 2025 with the same amount of rides, vendors and stages. We are excited to work together to increase overnight stays.

Rules and Regulations for Event Coordinators

- Event coordinators will be held accountable for promoting and advertising the event, including, but not limited to, listing the event on the Visit SLO CAL website (www.slocal.com) within 30 days of Board approval for funding.
- Event coordinators will also be held responsible for ensuring the Visit Atascadero logo and branding is used appropriately on any event materials. This includes ensuring the Visit Atascadero logo is visible on event website and marketing collateral within 30 days of Board approval for funding.
- Event coordinators should ensure every effort is made to promote the entire Atascadero destination. On the event website, event coordinators should only link to the Visit Atascadero lodging page (www.visitatascadero.com/lodging) and always

pay careful attention to never promote specific lodging properties unless individual agreements with those properties have been arranged outside of ATBID activity.

- Event coordinators should plan to attend an ATBID Board Meeting following the event to provide a recap presentation which includes attendee numbers, overnight stays, event perception and any other pertinent information for the Board.
- Visit Atascadero must be offered logo promotion opportunity (ex. Visit Atascadero logo included on event marketing materials like glassware) if event support from the ATBID Board totals \$7,500 or more.
- Please also reference the Expectations of Event Organizer by Tier to ensure you are correctly and accurately recognizing Visit Atascadero's support. It is the responsibility of the event organizer to follow up with Visit Atascadero for necessary branding pieces needed to fit the promotion requirements.
- Funding will be invoiced in sections based on promotion compliance and specific event expectations. Funding percentages and invoice timelines will be determined in advance between the Atascadero TBID Board and the event organizer.

***Please include a detailed event budget and marketing strategy. Feel free to attach additional information for consideration with application.

***You must submit copies of additional required documents two weeks prior to event. The Atascadero TBID Board reserves the right to withdraw funding if the appropriate documents are not obtained for the event.

You must acknowledge and agree to the rules and regulations on Page 10.

IMPORTANT: Future ATBID event sponsorship funding requests may be affected should any discrepancies, including, but not limited to, event application, planning, marketing materials or website, be brought to ATBID's attention.

Cancellation Policy: Should the event not take place as presented and scheduled; event coordinators are required to reimburse the ATBID for sponsorship support. If the event is cancelled by the Event Coordinator because of sickness, accidents, riots, strikes, epidemics, inclement weather, acts of God, or any other legitimate conditions beyond either party's control, the Event Coordinator agrees to provide a financial report showing the current status of funds used. The ATBID Board will follow the official event cancellation protocol and will determine the fund quantity to either be refunded or rolled forward to future events based on the financial report.

Applicant Signature ____**Andres Nuño**____ **Date** __2/12/25__

VISIT

SIO CAL

November 2024

Current Month - November 2024 vs November 2023

Occ %		ADR		RevPAR		Percent Change from November 2023						
2024	2023	2024	2023	2024	2023	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold	
Arroyo Grande, CA+	58.8		128.52		75.54							
Atascadero, CA+	61.1	60.6	143.55	138.69	87.74	83.99	0.9	3.5	4.5	-8.2	-12.2	-11.3
Cambria, CA+	58.6	60.1	203.50	186.74	119.33	112.27	-2.5	9.0	6.3	6.3	0.0	-2.5
Morro Bay, CA+	57.7	54.6	139.22	129.22	80.28	70.61	5.5	7.7	13.7	13.6	-0.1	5.4
Paso Robles, CA+	65.6	63.6	198.27	196.96	130.14	125.32	3.2	0.7	3.8	5.9	1.9	5.2
Pismo Beach, CA+	60.1	60.3	210.56	205.52	126.50	123.86	-0.3	2.5	2.1	1.7	-0.5	-0.8
San Luis Obispo, CA+	66.8	62.6	171.03	165.42	114.16	103.48	6.7	3.4	10.3	6.5	-3.5	3.0
San Simeon, CA+	49.9	50.1	126.09	122.72	62.93	61.47	-0.4	2.8	2.4	2.4	0.0	-0.4
Five Cities+	59.9	60.7	207.22	199.64	124.22	121.09	-1.2	3.8	2.6	2.2	-0.3	-1.5
North Coast+	55.2	56.1	167.76	157.67	92.57	88.49	-1.7	6.4	4.6	4.6	0.0	-1.7
North County+	64.3	62.6	183.33	179.15	117.87	112.15	2.7	2.3	5.1	2.7	-2.3	0.4
South County+	63.0	61.6	190.16	183.90	119.89	113.19	2.4	3.4	5.9	4.0	-1.8	0.6
San Luis Obispo County	61.5	60.2	180.12	173.40	110.85	104.40	2.2	3.9	6.2	4.7	-1.4	0.8

Year to Date - November 2024 vs November 2023

Occ %		ADR		RevPAR		Percent Change from YTD 2023						
2024	2023	2024	2023	2024	2023	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold	
64.1		141.80		90.93								
64.0	65.0	145.01	147.71	92.83	96.02	-1.5	-1.8	-3.3	-5.5	-2.2	-3.7	
64.0	62.0	212.28	213.69	135.90	132.56	3.2	-0.7	2.5	2.6	0.0	3.2	
63.2	62.1	153.05	150.57	96.73	93.48	1.8	1.6	3.5	5.7	2.2	4.0	
65.9	70.8	201.42	199.12	132.81	141.03	-6.9	1.2	-5.8	-4.1	1.9	-5.1	
65.9	65.6	235.62	239.74	155.22	157.29	0.4	-1.7	-1.3	-2.5	-1.2	-0.8	
69.8	68.8	180.80	181.45	126.18	124.75	1.5	-0.4	1.1	0.7	-0.5	1.0	
57.4	57.1	139.26	142.26	79.96	81.21	0.6	-2.1	-1.5	-1.5	0.0	0.6	
65.8	65.9	230.24	229.28	151.45	151.14	-0.2	0.4	0.2	-0.7	-0.9	-1.1	
61.5	60.7	178.95	179.81	110.13	109.13	1.4	-0.5	0.9	0.9	0.0	1.4	
65.3	69.0	184.49	183.84	120.54	126.85	-5.3	0.4	-5.0	-4.4	0.6	-4.7	
67.6	67.2	207.01	207.07	140.03	139.22	0.6	-0.0	0.6	-0.1	-0.7	-0.1	
65.8	66.2	192.46	192.17	126.66	127.14	-0.5	0.2	-0.4	-0.4	0.0	-0.5	

Participation

Properties		Rooms	
Census	Sample	Census	Sample
7	4	438	371
7	5	542	500
21	12	750	433
31	7	966	306
23	13	1465	1076
30	18	2112	1657
38	21	2432	1675
10	4	601	300
47	26	2954	2221
40	16	1518	733
31	18	2034	1576
84	47	5368	3896
195	88	10145	6511

SOURCE: CoStar, STR, LLC. REPUBLICATION OR OTHER REUSE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR, LLC IS STRICTLY PROHIBITED.

Page 27 of 87



CITY OF ATASCADERO
ADVISORY BOARD FOR THE ATASCADERO
TOURISM BUSINESS IMPROVEMENT DISTRICT
STAFF REPORT

Item B2

2/19/25

Central Coast Craft Beer Festival
2025 Event Update

RECOMMENDATION:

ATBID Advisory Board receive and file the Central Coast Craft Brewers Consortium's event update for the Central Coast Craft Beer Festival to be held on March 22, 2025.

DISCUSSION:

At the February 28, 2024, ATBID Advisory Board Meeting, the Central Coast Brewers Consortium presented their event recap for the 2024 Central Coast Craft Beer Festival and a sponsorship request for the 2025 event as well. Following the presentation, the Advisory Board approved a \$5,000 ATBID sponsorship of the 2025 Central Coast Craft Beer Festival.

The Event Sponsorship Application requires event promoters to provide an update as to the marketing efforts currently in place to promote the event to craft beer enthusiasts outside of our area to come visit, stay and enjoy our City. The Central Coast Craft Brewers Consortium will provide an oral presentation about the marketing efforts, progress with ticket sales, shuttle tickets, hotel promotions, and what to expect on March 22, 2025.

FISCAL IMPACT:

None.

ATTACHMENTS:

1. Central Coast Craft Beer Festival Update 2025



SATURDAY, MARCH 22ND
12 - 4 p.m. • Sunken Gardens



UPDATES

NEW!!!

The Guild is including a special Invitational Part of the event this year that allows each Guild member to invite an independently owned craft brewery from **OUTSIDE** the tri-counties.

This should lead to more overnight stays from the breweries as well as enhance the event and hopefully lead to more tickets sold!

Goal is now over 60 breweries in attendance!

FRIDAY

- Disc Golf Tournament hosted by Ancient Owl on Friday afternoon
- Brewer's Reception at Wild Fields (over 100 attended in 2024)

MARKETING

- Including Streaming Advertising this year (Hulu, Sling, etc.)
- Allowing each brewery to give away 2 VIP tickets on their social media platforms. This should lead to some additional overnight stays.

GUESTS

We will once again have over 2,000 guests on site in 2025!



CITY OF ATASCADERO

ADVISORY BOARD FOR THE ATASCADERO TOURISM BUSINESS IMPROVEMENT DISTRICT STAFF REPORT

Item B3

2/19/25

SLO CAL Tourism Exchange Lodging Forecast Results

RECOMMENDATION:

ATBID Advisory Board to receive and file SLO CAL Tourism Exchange Lodging Forecast Co-op results for Atascadero and SLO County.

DISCUSSION:

Visit SLO CAL provided each of the individual destinations an opportunity to be a part of a Lodging Forecast with the change in the tourism market taking into account new inventory planned in the months ahead. The co-op provides performance indicators for lodging owners to assist with budgeting and anticipate travel trends.

Deliverables:

- Lodging Forecast (Delivered Mid-December 2024)
 - Lodging performance indicators (e.g., supply, demand, occupancy, ADR, RevPAR) with monthly, quarterly and annual estimates looking through 2026

Investment Level

- Just Lodging Forecast: \$4,000 - \$6,000 – ended up being just over \$3,000 with all destinations participating.

**Price depends on total number of participating destinations*

There will be an oral presentation reviewing the forecast for both the county results and our local Atascadero results.

FISCAL IMPACT:

None.

ATTACHMENTS:

1. Tourism Economics SLO County Lodging Forecast
2. Tourism Economics Atascadero Lodging Forecast



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

SLO CAL Lodging Forecast

December 2024

Prepared for:



Context

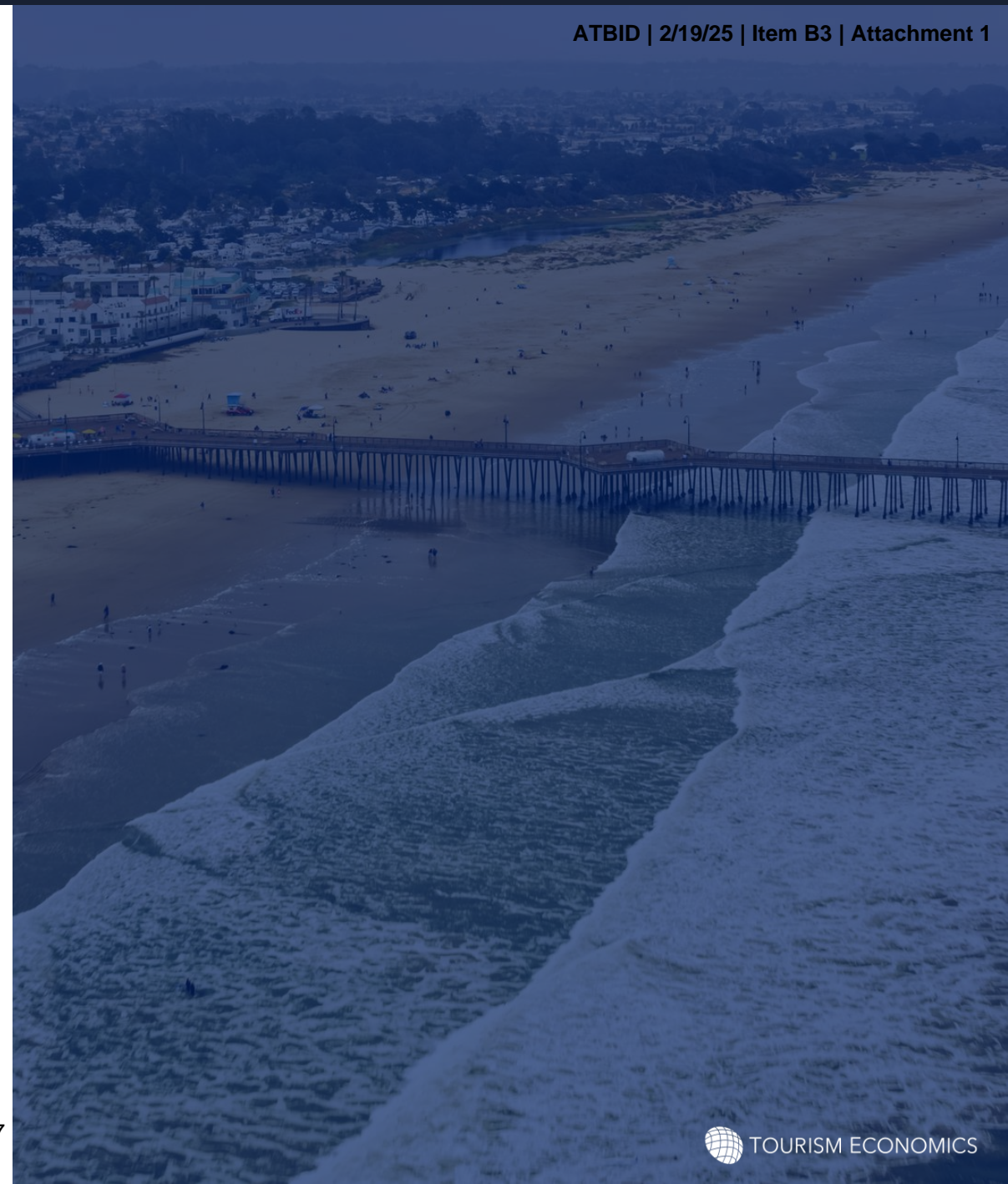
Visit SLO CAL engaged Tourism Economics to prepare a lodging forecast of key indicators for San Luis Obispo County and the following additional geographies (which will be delivered separately).

- North County
- South County
- Atascadero, CA
- Arroyo Grande, CA
- Morro Bay, CA
- Paso Robles, CA
- Pismo Beach, CA
- San Luis Obispo, CA

This forecast relies on:

- Monthly STR hotel data through October 2024;
- Weekly STR hotel data through November 30, 2024;
- Economic forecasts prepared by Oxford Economics, parent company of Tourism Economics; and,
- Assumptions on the future path of the tourism sector in the context of economic trends.

Due to standard forecast variability, future hotel performance may vary from the estimates presented in this forecast.



- 1 Forecast Summary**
- 2 US Economy Assumptions
- 3 US Travel Demand Assumptions
- 4 Key Findings
- 5 Forecast Tables

Forecast Summary

- **San Luis Obispo County hotel RevPAR is expected to grow 0.1% in 2025 and then decline 0.7% in 2026.**
- **San Luis Obispo County hotel room revenue is expected to grow 2.1% in 2025 and 2.9% in 2026.**
- As a result of the recent US elections, we assume a Republican-led Congress will extend the 2017 personal tax cuts and enact higher spending. We also assume President-elect Donald Trump will use his presidential power to reduce immigration and impose targeted tariffs on China, Mexico, Canada, and the European Union. Even with all the recent changes in the balance of power, the outlook for 2025 doesn't change appreciably because it will take time for changes in fiscal, trade, and immigration policy to be implemented and impact the economy.
- Our new tax policy assumptions support a higher level of real GDP through the end of the decade, though the negative macroeconomic consequences of higher tariffs and immigration restrictions still predominate in the out-years.
- The US economy is doing well. The savings rate, real disposable income growth, and corporate profit margins have all been recently revised upward. These revisions plus the results of the recent election suggest consumer spending will strengthen next year.
- Our forecast is for solid growth in consumer spending over the next few years, but that is largely attributed to the resilience of high-income households, who account for most of the consumption. By contrast, spending patterns of low-income households will take many years to recover. The share of low-income household spending on discretionary items fell sharply in 2020 and has barely begun to recover, a clear sign that more of their incomes are going toward necessities.

Forecast Summary

Forecast Summary San Luis Obispo County

	2019	2020	2021	2022	2023	2024	2025	2026
Levels								
Supply (millions)	3.55	3.64	3.65	3.71	3.75	3.75	3.83	3.96
Demand (millions)	2.44	1.83	2.39	2.51	2.44	2.43	2.47	2.54
Occupancy	68.7%	50.3%	65.3%	67.7%	65.1%	64.8%	64.7%	64.1%
ADR	\$149.91	\$157.36	\$197.09	\$187.68	\$189.41	\$190.30	\$190.83	\$191.16
ADR, Real	\$149.91	\$155.63	\$187.01	\$167.17	\$162.67	\$159.50	\$156.46	\$153.60
RevPAR	\$102.98	\$79.11	\$128.64	\$127.07	\$123.23	\$123.29	\$123.40	\$122.56
RevPAR, Real	\$102.98	\$78.24	\$122.06	\$113.18	\$105.83	\$103.34	\$101.17	\$98.48
Room Revenue (millions)	\$365.2	\$287.8	\$470.2	\$472.0	\$461.8	\$462.2	\$472.1	\$485.9
Growth								
Supply		2.6%	0.5%	1.6%	0.9%	0.0%	2.1%	3.6%
Demand		-24.9%	30.5%	5.4%	-3.1%	-0.4%	1.9%	2.7%
Occupancy		-26.8%	29.8%	3.7%	-3.9%	-0.4%	-0.2%	-0.9%
ADR		5.0%	25.2%	-4.8%	0.9%	0.5%	0.3%	0.2%
RevPAR		-23.2%	62.6%	-1.2%	-3.0%	0.0%	0.1%	-0.7%
Room Revenue		-21.2%	63.4%	0.4%	-2.2%	0.1%	2.1%	2.9%
<i>Relative to 2019</i>		-21.2%	28.8%	29.3%	26.5%	26.6%	29.3%	33.1%

Source: STR, Tourism Economics

- 1 Forecast Summary
- 2 US Economy Assumptions**
- 3 US Travel Demand Assumptions
- 4 Key Findings
- 5 Forecast Tables

US Economy Assumptions

Economic Assumptions

- Economic assumptions are based on Oxford Economics' November 2024 US Outlook (released November 12) and October 16 research briefing.
- As a result of the recent US elections, we assume a Republican-led Congress will extend the 2017 personal tax cuts and enact higher spending. We also assume President-elect Donald Trump will use his presidential power to reduce immigration and impose targeted tariffs on China, Mexico, Canada, and the European Union. Even with all the recent changes in the balance of power, the outlook for 2025 doesn't change appreciably because it will take time for changes in fiscal, trade, and immigration policy to be implemented and impact the economy.
- Our new tax policy assumptions support a higher level of real GDP through the end of the decade, though the negative macroeconomic consequences of higher tariffs and immigration restrictions still predominate in the out-years.
- The US economy is doing well. The savings rate, real disposable income growth, and corporate profit margins have all been recently revised upward. These revisions plus the results of the recent election suggest consumer spending will strengthen next year.
- We expect the Fed will continue cutting the federal funds rate throughout 2025. The labor market and inflation are close to the Fed's targets, so we think 2025 will be a year of policy normalization and believe the Fed will aim to get the federal funds rate closer to its long-run neutral rate.
- Our forecast is for solid growth in consumer spending over the next few years, but that is largely attributed to the resilience of high-income households, who account for most of the consumption. By contrast, spending patterns of low-income households will take many years to recover. The share of low-income household spending on discretionary items fell sharply in 2020 and has barely begun to recover, a clear sign that more of their incomes are going toward necessities.

US Economy Assumptions

GDP

US: GDP Forecast

% annualized

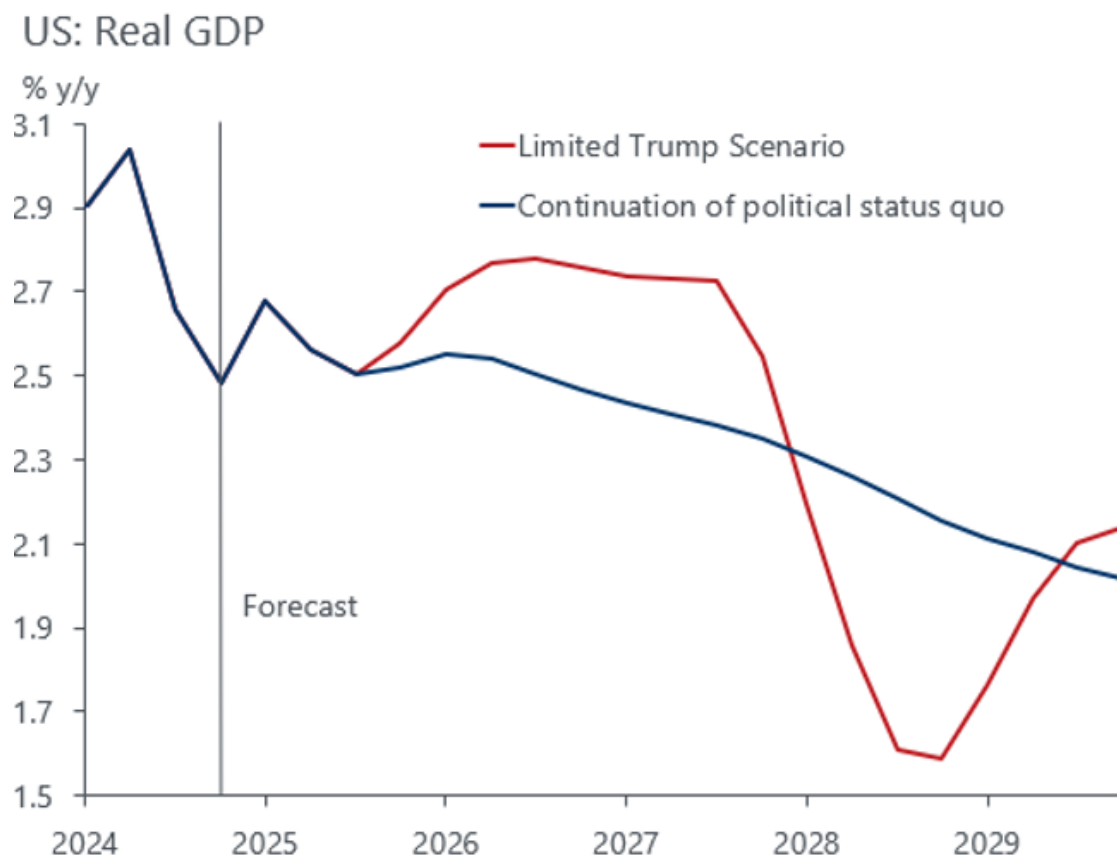


- We expect US GDP growth of 2.8% in 2024 and 2.6% in 2025, ultimately avoiding a recession with a successful “soft-landing”.

Source: Oxford Economics (November 2024 Forecast)

US Economy Assumptions

GDP under a limited Trump scenario



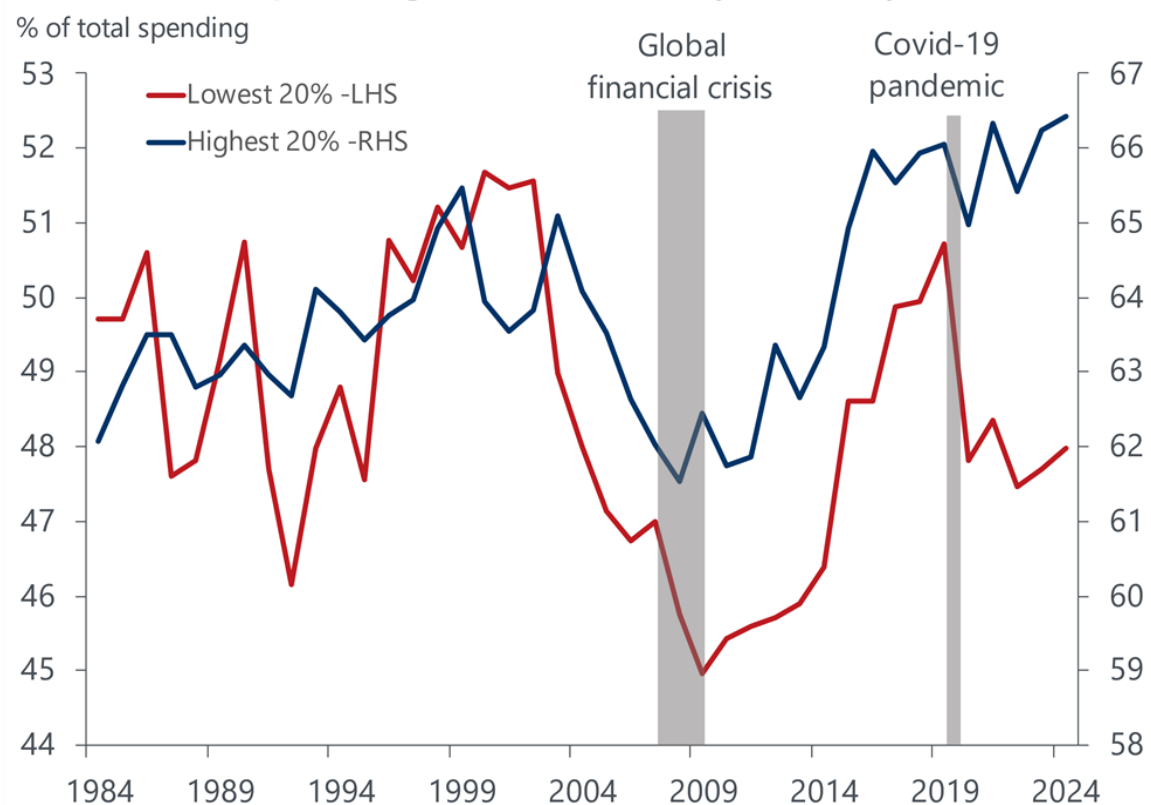
- Our new tax policy assumptions support a higher level of real GDP through the end of the decade, though the negative macroeconomic consequences of higher tariffs and immigration restrictions still predominate in the out-years.

Source: Oxford Economics/Haver Analytics

US Economy Assumptions

Discretionary spending by income

US: Share of spending on discretionary items by income



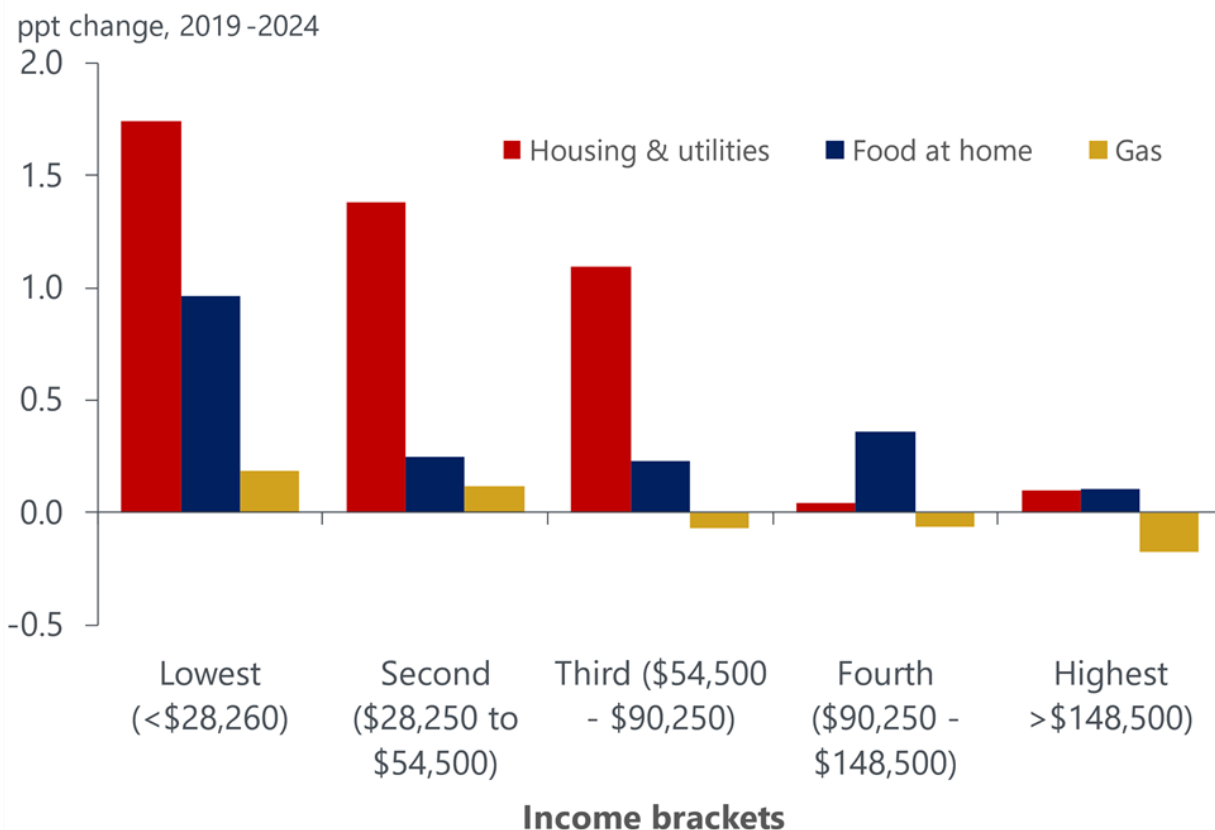
- Low-income discretionary spending has barely begun its recovery.
- High-income discretionary spending has remained resilient.

Source: Oxford Economics/Haver Analytics

US Economy Assumptions

Spending share on essentials

US: Spending share on essentials by income quintile



- Low-income households are dedicating more of their budget to essentials.

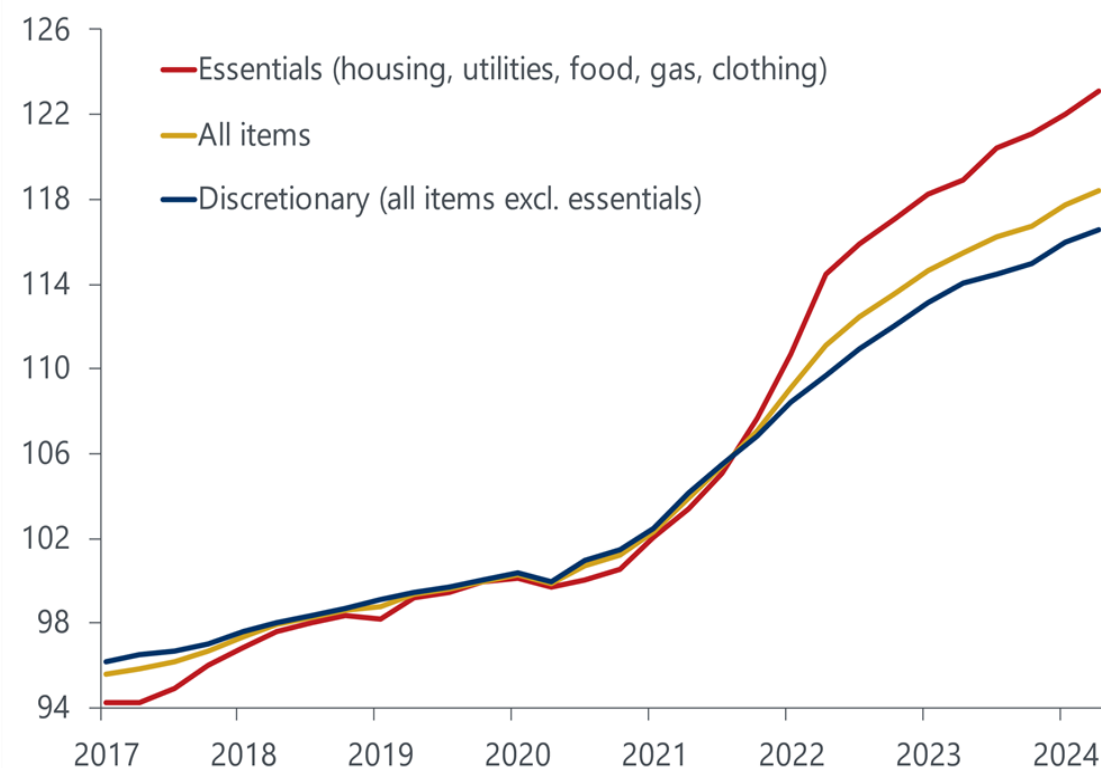
Source: Oxford Economics/Haver Analytics

US Economy Assumptions

Inflation by essential/discretionary purchases

US: PCE price index

2019 Q4 = 100



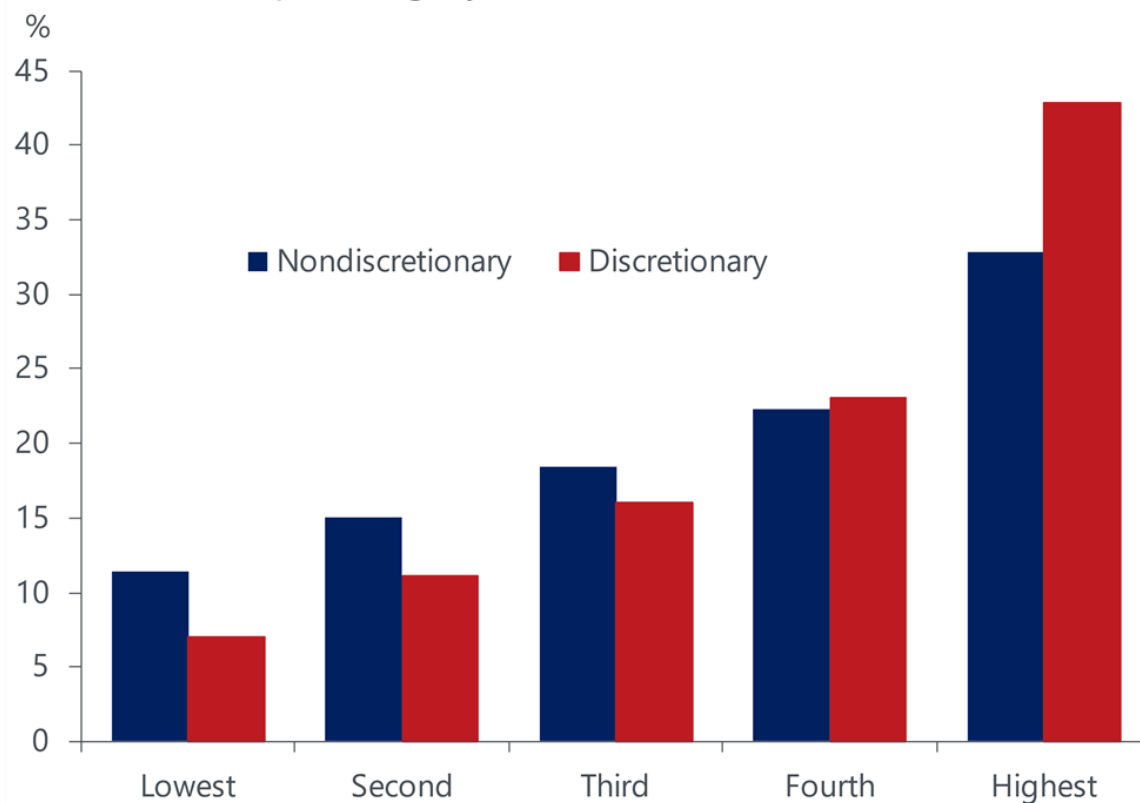
- Inflation has hit essentials more intensely than discretionary purchases.

Source: Oxford Economics/Haver Analytics

US Economy Assumptions

Spending share by income bracket

US: Share of spending by income bracket



- Our forecast is for solid growth in consumer spending over the next few years, but that is largely attributed to the resilience of high-income households, who account for most of the consumption.

Source: Oxford Economics/Haver Analytics

- 
- 1 Forecast Summary
 - 2 US Economy Assumptions
 - 3 US Travel Demand Assumptions**
 - 4 Key Findings
 - 5 Forecast Tables

US Demand Assumptions

Leisure demand activity: US

- Positive factors contributing to leisure demand activity:
 - Strong leisure travel intentions among higher-income households
 - Solid labor market conditions, steady growth in real disposable incomes, and declining interest rates
- Impediments to leisure demand activity:
 - Low-income households spending more on essentials than discretionary purchases
 - Capacity limitations (peak demand for certain months, holidays, weekends, in certain destination types)
 - A growing unemployment rate could cause a pullback on consumption and discretionary spending

Group demand activity: US

- Positive factors contributing to group demand activity:
 - Continuing recovery from the pandemic as businesses and groups resume event routines
 - Corporate profit margins remain strong
- Impediments to group demand activity:
 - Capacity limitations (peak demand for certain months, holidays, weekends, in certain destination types)
 - A growing unemployment rate could cause a pullback on consumption which would cause businesses to cut back on labor demand and other spending

US Demand Assumptions

Business travel demand activity: US

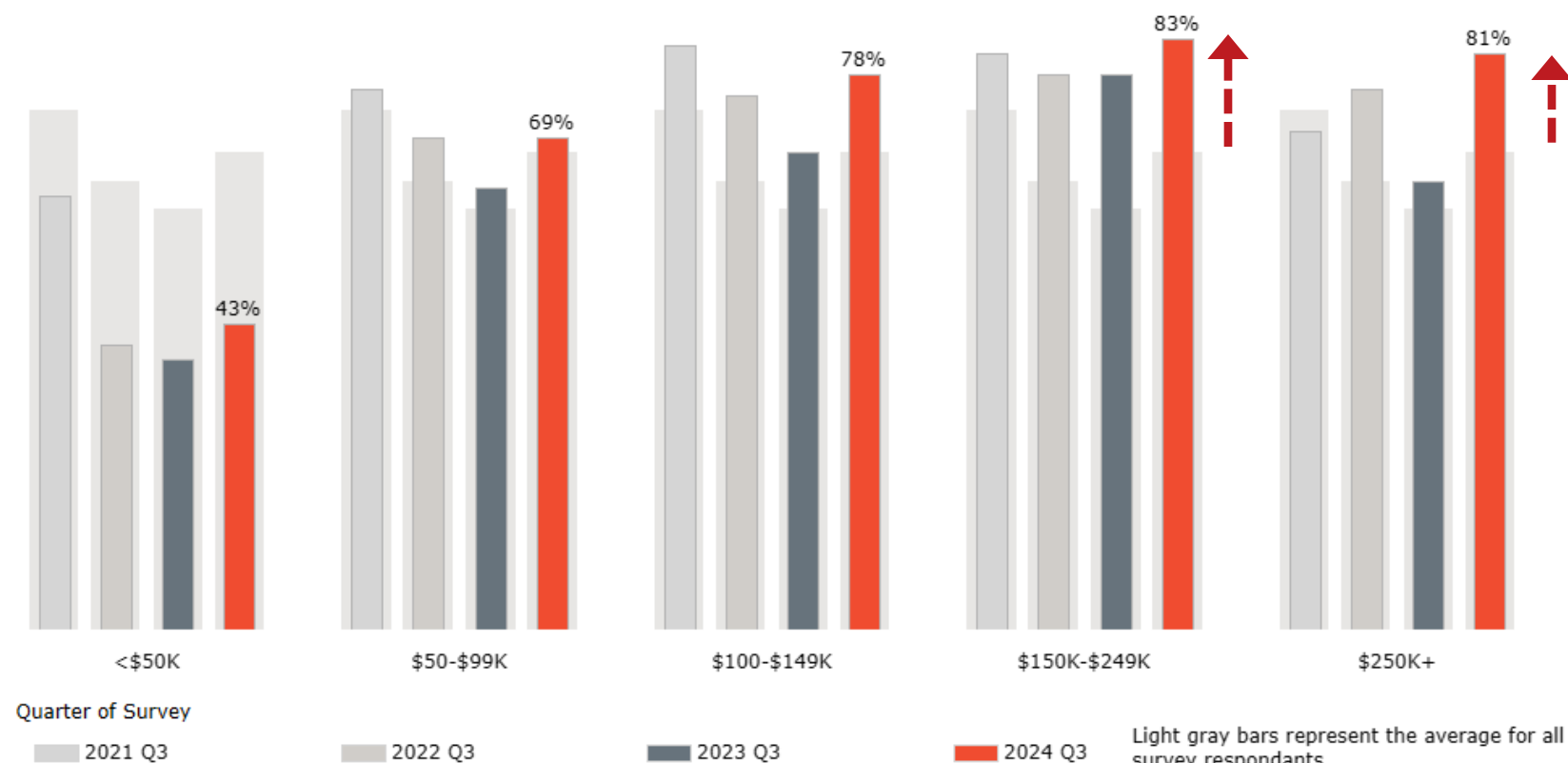
- Positive factors contributing to business demand activity:
 - Continuing recovery from the pandemic as businesses resume travel
 - Corporate profit margins remain strong
- Impediments to business demand activity:
 - A growing unemployment rate could potentially cause a pullback on consumption which would cause businesses to cut back on labor demand and other spending

International inbound demand activity: US

- Positive factors contributing to international inbound demand activity:
 - Continuing recovery from the pandemic
- Impediments to international inbound demand activity:
 - Prolonged visa wait times
 - A historically strong dollar

US Demand Assumptions

Planning Leisure Travel Within the Next 6 Months
% of American Consumers

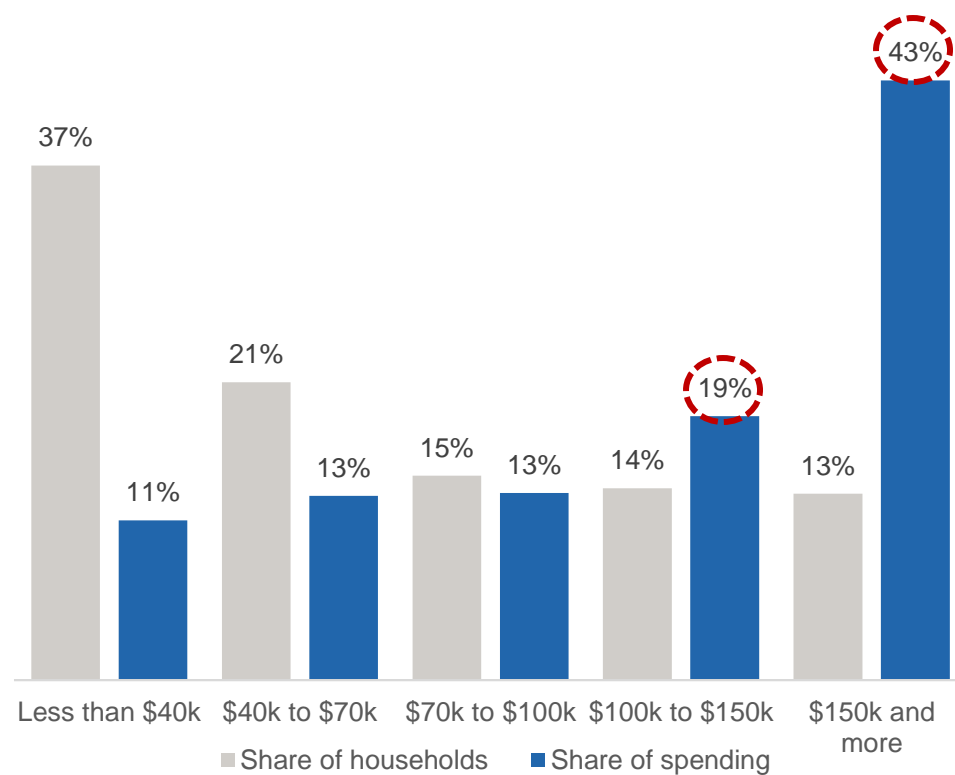


- Leisure travel intentions in the short term are expected to be resilient for high-income earners.

US Demand Assumptions

Lodging spending by household income

Leisure travel



Note: Based on three-year average through 2020.

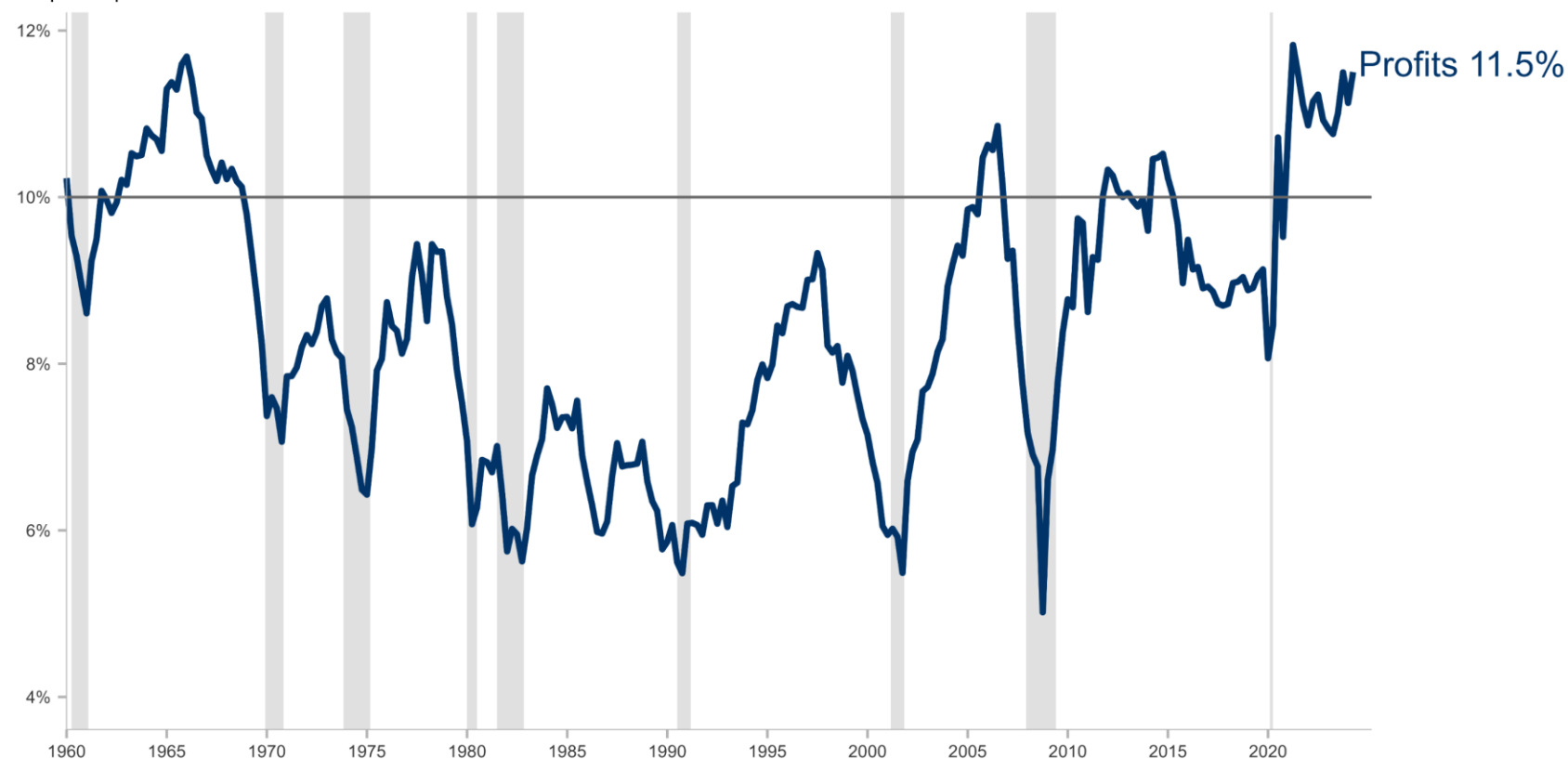
Source: BLS, Tourism Economics

- Households that earn more than \$100k account for more than 60% of lodging spending.

US Demand Assumptions

Corporate profit margins

Corporate profits before tax as a ratio to GDP



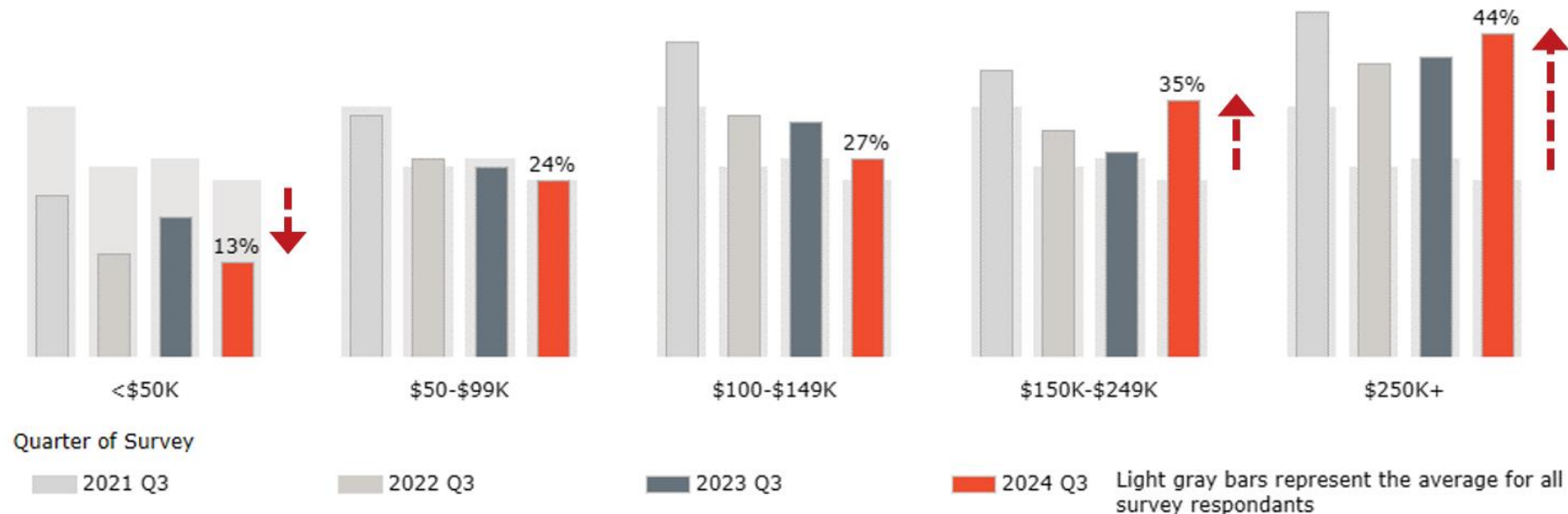
Note: Quarterly data through 2024Q2. Grey bars indicate recessions. Based on corporate profits with inventory valuation and capital consumption adjustments, domestic industries. Source: BEA, NBER

- Equity analysts expect 2024 earnings growth for S&P of 9%
 - *FactSet Research*

US Demand Assumptions

Planning Business Travel Within the Next 6 Months % of American Consumers

- Business travel intentions are also growing.

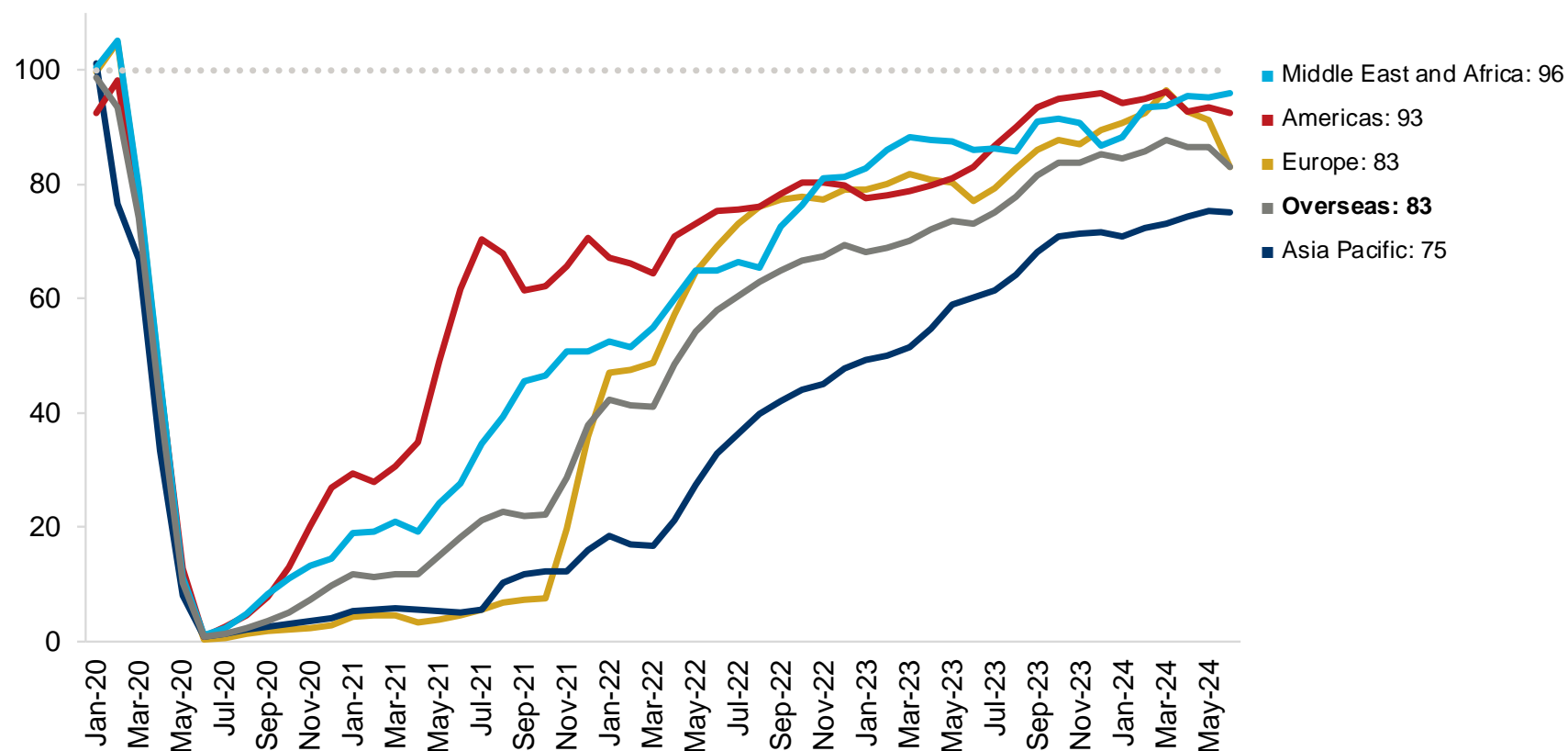


Source: MMGY Portrait of American Travelers; Tourism Economics Symphony

US Demand Assumptions

Visits to US by global region

Index (2019=100, same month comparison), three-month moving average



- Inbound recovery pace has slowed but remains positive.

Note: Americas excludes Canada and Mexico. Most recent data point is June 2024.
Source: NTT

US Demand Assumptions

US Room Demand

By chain scale, quarterly

	Total	Luxury	Upper Upscale	Upscale	Upper Midscale	Midscale	Economy	Independent
Year-over-year growth								
2023 Q1	6.4%	20.4%	22.3%	10.7%	6.1%	0.0%	-5.2%	2.6%
2023 Q2	-0.5%	1.4%	4.5%	2.9%	1.4%	-2.1%	-6.6%	-3.7%
2023 Q3	-0.2%	3.9%	3.9%	2.8%	0.9%	-1.8%	-5.2%	-2.8%
2023 Q4	-1.1%	6.2%	3.2%	1.4%	-0.4%	-3.8%	-5.1%	-3.9%
2024 Q1	-1.2%	9.3%	3.2%	0.1%	-0.8%	-4.2%	-4.4%	-3.5%
2024 Q2	1.7%	11.7%	4.7%	2.8%	2.3%	1.0%	-1.5%	-0.5%
2024 Q3	0.3%	10.0%	3.2%	1.3%	0.9%	0.1%	-2.3%	-2.0%
Relative to 2019								
2023 Q1	-0.1%	-6.5%	-2.7%	7.4%	9.0%	3.8%	-8.3%	-7.1%
2023 Q2	-2.3%	-5.2%	-2.2%	5.7%	5.8%	-1.3%	-10.8%	-9.4%
2023 Q3	-2.5%	-5.3%	-1.4%	5.1%	5.7%	-2.0%	-11.5%	-9.3%
2023 Q4	-2.0%	-2.4%	-1.8%	4.0%	6.1%	-1.7%	-9.7%	-8.6%
2024 Q1	-1.3%	2.2%	0.4%	7.5%	8.1%	-0.5%	-12.4%	-10.3%
2024 Q2	-0.6%	5.9%	2.4%	8.6%	8.2%	-0.3%	-12.1%	-9.8%
2024 Q3	-2.2%	4.2%	1.7%	6.5%	6.6%	-1.9%	-13.5%	-11.1%

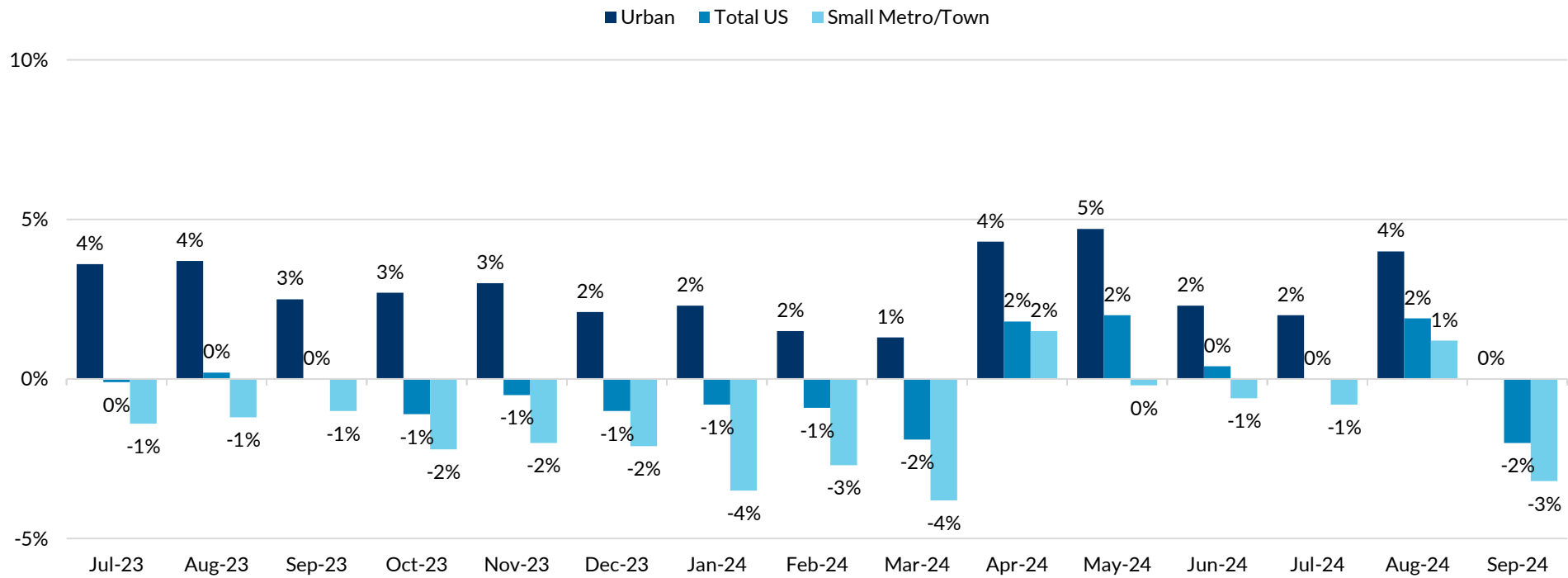
Source: STR, Tourism Economics

- The upper chains more associated with high-income households have seen continued demand growth above 2019 levels in 2023-2024.
- Midscale room demand is near recovery but has declined or had flat growth through 2023-2024.
- Economy room demand has continued to decline below 2019 levels.

US Demand Assumptions

US Room Demand by Location

Year-over-year growth



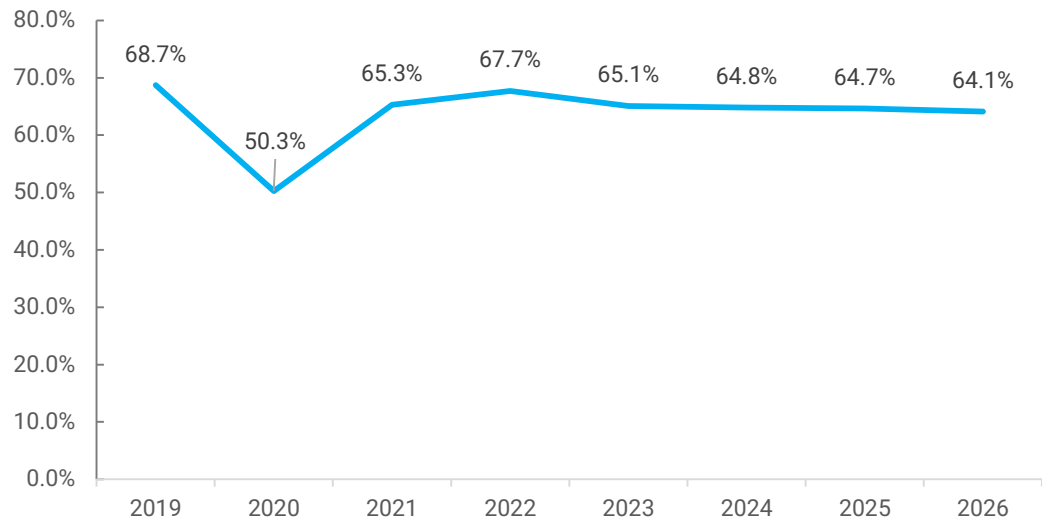
Source: STR, Tourism Economics

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 - 2 US Economy Assumptions
 - 3 US Travel Demand Assumptions
 - 4 Key Findings**
 - 5 Forecast Tables

Key Findings

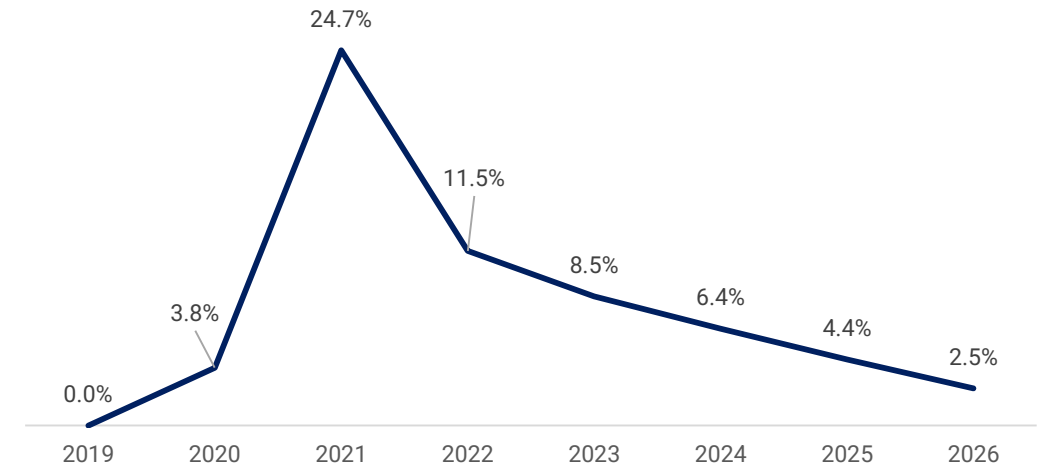
Annual

Occupancy: Annual
San Luis Obispo County

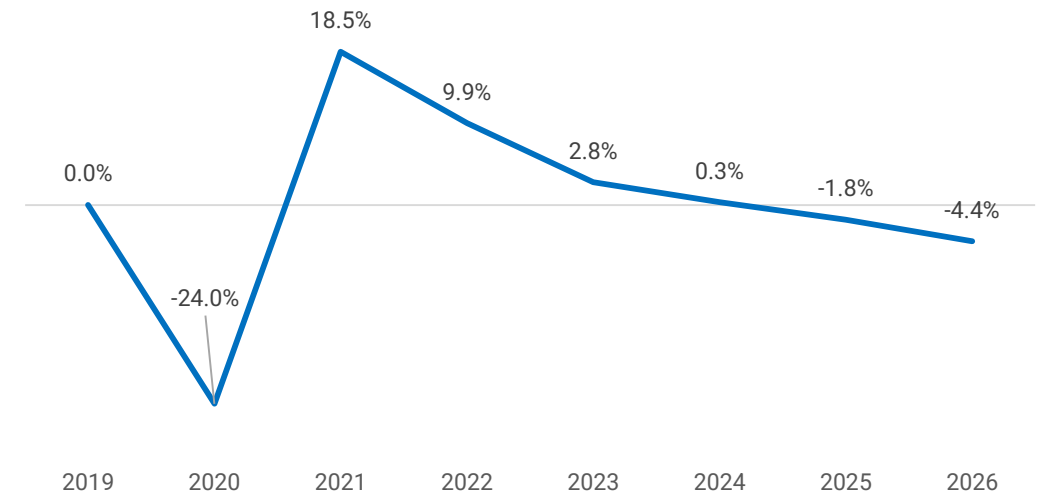


Sources: STR, Tourism Economics

ADR, Real: Annual
San Luis Obispo County, Relative to 2019



RevPAR, Real: Annual
San Luis Obispo County, Relative to 2019



Sources: STR, Tourism Economics

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- 2 US Economy Assumptions
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Forecast Tables

Annual

Forecast Table: Annual
San Luis Obispo County

	Supply	Demand	Occ.	ADR	RevPAR	Room Revenue	Supply	Demand	Occ.	ADR	RevPAR	Room Revenue	Supply	Demand	Occ.	ADR	RevPAR	Room Revenue
Levels							Growth						Relative to 2019					
2019	3,545,841	2,435,803	68.7%	\$149.91	\$102.98	\$365,159,927							0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2020	3,637,343	1,828,622	50.3%	\$157.36	\$79.11	\$287,759,028	2.6%	-24.9%	-26.8%	5.0%	-23.2%	-21.2%	2.6%	-24.9%	-26.8%	5.0%	-23.2%	-21.2%
2021	3,654,801	2,385,523	65.3%	\$197.09	\$128.64	\$470,164,095	0.5%	30.5%	29.8%	25.2%	62.6%	63.4%	3.1%	-2.1%	-5.0%	31.5%	24.9%	28.8%
2022	3,714,624	2,514,972	67.7%	\$187.68	\$127.07	\$472,020,437	1.6%	5.4%	3.7%	-4.8%	-1.2%	0.4%	4.8%	3.3%	-1.4%	25.2%	23.4%	29.3%
2023	3,747,400	2,438,055	65.1%	\$189.41	\$123.23	\$461,799,251	0.9%	-3.1%	-3.9%	0.9%	-3.0%	-2.2%	5.7%	0.1%	-5.3%	26.3%	19.7%	26.5%
2024	3,748,787	2,428,822	64.8%	\$190.30	\$123.29	\$462,194,987	0.0%	-0.4%	-0.4%	0.5%	0.0%	0.1%	5.7%	-0.3%	-5.7%	26.9%	19.7%	26.6%
2025	3,825,713	2,473,808	64.7%	\$190.83	\$123.40	\$472,087,039	2.1%	1.9%	-0.2%	0.3%	0.1%	2.1%	7.9%	1.6%	-5.9%	27.3%	19.8%	29.3%
2026	3,964,339	2,541,627	64.1%	\$191.16	\$122.56	\$485,854,009	3.6%	2.7%	-0.9%	0.2%	-0.7%	2.9%	11.8%	4.3%	-6.7%	27.5%	19.0%	33.1%

Source: STR, Tourism Economics

Forecast Tables

Quarterly

Forecast Table: Quarterly
San Luis Obispo County

San Luis Obispo County							Growth						Relative to 2019					
Levels							Supply	Demand	Occ.	ADR	RevPAR	Room revenue	Supply	Demand	Occ.	ADR	RevPAR	Room revenue
2022 Q1	914,341	545,252	59.6%	\$155.72	\$92.86	\$84,907,416	1.7%	14.8%	12.8%	3.2%	16.4%	18.4%	7.1%	7.1%	0.0%	23.6%	23.6%	32.4%
Q2	922,085	671,108	72.8%	\$196.91	\$143.31	\$132,148,595	1.4%	3.7%	2.2%	-1.2%	1.0%	2.4%	5.8%	4.8%	-1.0%	25.5%	24.3%	31.6%
Q3	938,325	727,043	77.5%	\$214.25	\$166.01	\$155,771,146	2.0%	5.1%	3.1%	-8.4%	-5.6%	-3.7%	4.4%	3.4%	-1.0%	25.8%	24.6%	30.1%
Q4	939,873	571,569	60.8%	\$173.55	\$105.54	\$99,193,280	1.4%	0.0%	-1.4%	-7.9%	-9.2%	-7.9%	1.9%	-2.0%	-3.8%	25.2%	20.4%	22.7%
2023 Q1	919,620	509,858	55.4%	\$154.49	\$85.65	\$78,765,961	0.6%	-6.5%	-7.0%	-0.8%	-7.8%	-7.2%	7.7%	0.2%	-7.0%	22.6%	14.0%	22.8%
Q2	934,628	654,909	70.1%	\$199.84	\$140.03	\$130,873,958	1.4%	-2.4%	-3.7%	1.5%	-2.3%	-1.0%	7.3%	2.3%	-4.6%	27.4%	21.5%	30.3%
Q3	947,233	703,065	74.2%	\$217.51	\$161.44	\$152,923,124	0.9%	-3.3%	-4.2%	1.5%	-2.8%	-1.8%	5.4%	0.0%	-5.2%	27.7%	21.1%	27.7%
Q4	945,919	570,223	60.3%	\$174.03	\$104.91	\$99,236,208	0.6%	-0.2%	-0.9%	0.3%	-0.6%	0.0%	2.5%	-2.3%	-4.7%	25.6%	19.7%	22.7%
2024 Q1	923,037	510,708	55.3%	\$155.23	\$85.89	\$79,276,156	0.4%	0.2%	-0.2%	0.5%	0.3%	0.6%	8.1%	0.3%	-7.2%	23.2%	14.3%	23.6%
Q2	937,057	639,658	68.3%	\$199.39	\$136.11	\$127,539,120	0.3%	-2.3%	-2.6%	-0.2%	-2.8%	-2.5%	7.6%	-0.1%	-7.1%	27.1%	18.1%	27.0%
Q3	949,164	708,788	74.7%	\$217.27	\$162.25	\$153,999,400	0.2%	0.8%	0.6%	-0.1%	0.5%	0.7%	5.6%	0.8%	-4.6%	27.6%	21.7%	28.6%
Q4	939,529	569,668	60.6%	\$177.96	\$107.91	\$101,380,312	-0.7%	-0.1%	0.6%	2.3%	2.9%	2.2%	1.8%	-2.3%	-4.1%	28.4%	23.1%	25.4%
2025 Q1	923,580	514,400	55.7%	\$158.00	\$88.00	\$81,273,487	0.1%	0.7%	0.7%	1.8%	2.5%	2.5%	8.2%	1.1%	-6.6%	25.4%	17.1%	26.7%
Q2	935,282	648,598	69.3%	\$201.29	\$139.59	\$130,555,207	-0.2%	1.4%	1.6%	1.0%	2.6%	2.4%	7.4%	1.3%	-5.6%	28.3%	21.1%	30.0%
Q3	969,899	716,829	73.9%	\$217.83	\$160.99	\$156,145,869	2.2%	1.1%	-1.0%	0.3%	-0.8%	1.4%	8.0%	1.9%	-5.6%	27.9%	20.8%	30.4%
Q4	996,952	593,981	59.6%	\$175.28	\$104.43	\$104,112,476	6.1%	4.3%	-1.7%	-1.5%	-3.2%	2.7%	8.1%	1.8%	-5.8%	26.5%	19.2%	28.8%
2026 Q1	977,220	530,027	54.2%	\$155.97	\$84.60	\$82,668,450	5.8%	3.0%	-2.6%	-1.3%	-3.9%	1.7%	14.5%	4.1%	-9.0%	23.8%	12.6%	28.9%
Q2	988,078	666,270	67.4%	\$199.61	\$134.60	\$132,991,536	5.6%	2.7%	-2.8%	-0.8%	-3.6%	1.9%	13.4%	4.1%	-8.2%	27.2%	16.7%	32.4%
Q3	998,936	738,835	74.0%	\$218.85	\$161.87	\$161,695,265	3.0%	3.1%	0.1%	0.5%	0.5%	3.6%	11.2%	5.1%	-5.5%	28.5%	21.5%	35.0%
Q4	1,000,105	606,494	60.6%	\$178.90	\$108.49	\$108,498,758	0.3%	2.1%	1.8%	2.1%	3.9%	4.2%	8.4%	4.0%	-4.1%	29.1%	23.8%	34.2%

Source: STR, Tourism Economics

Forecast Tables

Monthly

Forecast Table: Monthly

San Luis Obispo County

							Supply	Demand	Occ.	ADR	RevPAR	Room revenue		Supply	Demand	Occ.	ADR	RevPAR	Room revenue	
Levels							Growth							Relative to 2019						
2024	Jan	317,967	156,780	49.3%	\$142.56	\$70.29	\$22,350,883	0.4%	5.4%	5.0%	2.4%	7.5%	7.9%	8.2%	0.5%	-7.1%	22.5%	13.8%	23.1%	
	Feb	287,196	154,050	53.6%	\$154.82	\$83.04	\$23,849,629	0.4%	-11.8%	-12.1%	-2.3%	-14.1%	-13.8%	8.2%	-4.3%	-11.5%	21.2%	7.3%	16.0%	
	Mar	317,874	199,878	62.9%	\$165.48	\$104.05	\$33,075,643	0.4%	7.2%	6.8%	1.5%	8.4%	8.8%	8.1%	4.1%	-3.7%	25.0%	20.4%	30.2%	
	Apr	308,310	205,638	66.7%	\$186.92	\$124.67	\$38,437,343	0.6%	-6.3%	-6.8%	-3.3%	-9.9%	-9.4%	8.4%	-2.6%	-10.1%	27.7%	14.9%	24.5%	
	May	319,207	208,586	65.3%	\$192.33	\$125.68	\$40,116,686	0.0%	-0.5%	-0.5%	1.1%	0.6%	0.6%	7.2%	1.5%	-5.3%	28.4%	21.6%	30.4%	
	Jun	309,540	225,434	72.8%	\$217.29	\$158.25	\$48,985,091	0.2%	-0.2%	-0.4%	1.0%	0.6%	0.8%	7.1%	0.8%	-5.9%	25.3%	17.9%	26.3%	
	Jul	319,858	260,102	81.3%	\$229.53	\$186.65	\$59,700,516	0.2%	1.6%	1.4%	0.0%	1.4%	1.6%	6.4%	6.0%	-0.4%	26.9%	26.4%	34.4%	
	Aug	319,796	238,215	74.5%	\$222.39	\$165.66	\$52,976,165	0.2%	3.8%	3.6%	3.1%	6.8%	7.0%	5.3%	-0.4%	-5.4%	26.4%	19.5%	25.8%	
	Sep	309,510	210,471	68.0%	\$196.33	\$133.51	\$41,322,719	0.2%	-3.3%	-3.5%	-4.4%	-7.7%	-7.5%	5.3%	-3.7%	-8.6%	29.1%	18.1%	24.3%	
	Oct	315,797	210,281	66.6%	\$189.22	\$125.99	\$39,788,404	-1.0%	-2.3%	-1.3%	-0.6%	-1.9%	-2.9%	1.6%	-6.0%	-7.5%	28.3%	18.7%	20.5%	
	Nov	305,610	188,704	61.7%	\$179.16	\$110.62	\$33,807,914	-0.9%	1.8%	2.7%	5.0%	7.8%	6.9%	1.6%	-1.6%	-3.2%	30.0%	25.9%	27.9%	
	Dec	318,122	170,683	53.7%	\$162.78	\$87.34	\$27,783,994	-0.2%	0.6%	0.8%	3.6%	4.4%	4.3%	2.3%	1.7%	-0.6%	27.6%	26.9%	29.8%	
2025	Jan	318,122	158,581	49.8%	\$145.62	\$72.59	\$23,093,054	0.0%	1.1%	1.1%	2.1%	3.3%	3.3%	8.2%	1.6%	-6.1%	25.1%	17.6%	27.2%	
	Feb	287,336	161,040	56.0%	\$160.25	\$89.81	\$25,806,152	0.0%	4.5%	4.5%	3.5%	8.2%	8.2%	8.2%	0.1%	-7.5%	25.4%	16.0%	25.5%	
	Mar	318,122	194,778	61.2%	\$166.21	\$101.77	\$32,374,281	0.1%	-2.6%	-2.6%	0.4%	-2.2%	-2.1%	8.2%	1.4%	-6.2%	25.6%	17.8%	27.4%	
	Apr	307,860	212,411	69.0%	\$185.47	\$127.97	\$39,396,478	-0.1%	3.3%	3.4%	-0.8%	2.6%	2.5%	8.2%	0.7%	-7.0%	26.7%	17.9%	27.6%	
	May	318,122	209,797	65.9%	\$194.38	\$128.19	\$40,780,528	-0.3%	0.6%	0.9%	1.1%	2.0%	1.7%	6.9%	2.1%	-4.5%	29.8%	24.0%	32.5%	
	Jun	309,300	226,390	73.2%	\$222.53	\$162.88	\$50,378,200	-0.1%	0.4%	0.5%	2.4%	2.9%	2.8%	7.1%	1.2%	-5.5%	28.3%	21.3%	29.9%	
	Jul	322,245	258,153	80.1%	\$232.42	\$186.19	\$60,000,021	0.7%	-0.7%	-1.5%	1.3%	-0.2%	0.5%	7.2%	5.2%	-1.9%	28.5%	26.1%	35.1%	
	Aug	326,864	241,255	73.8%	\$222.94	\$164.55	\$53,785,221	2.2%	1.3%	-0.9%	0.2%	-0.7%	1.5%	7.6%	0.9%	-6.3%	26.7%	18.7%	27.8%	
	Sep	320,790	217,421	67.8%	\$194.83	\$132.05	\$42,360,627	3.6%	3.3%	-0.3%	-0.8%	-1.1%	2.5%	9.1%	-0.6%	-8.9%	28.2%	16.8%	27.5%	
	Oct	334,614	223,513	66.8%	\$187.54	\$125.27	\$41,917,516	6.0%	6.3%	0.3%	-0.9%	-0.6%	5.4%	7.6%	-0.1%	-7.2%	27.1%	18.0%	27.0%	
	Nov	325,740	196,787	60.4%	\$174.80	\$105.60	\$34,398,231	6.6%	4.3%	-2.2%	-2.4%	-4.5%	1.7%	8.3%	2.6%	-5.3%	26.8%	20.1%	30.1%	
	Dec	336,598	173,680	51.6%	\$160.05	\$82.58	\$27,796,729	5.8%	1.8%	-3.8%	-1.7%	-5.4%	0.0%	8.2%	3.5%	-4.4%	25.5%	20.0%	29.9%	

Source: STR, Tourism Economics

About Tourism Economics

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of the travel sector with proven economic tools to answer the most important questions facing our clients. More than 500 companies, associations, and destination work with Tourism Economics every year as a research partner. We bring decades of experience to every engagement to help our clients make better marketing, investment, and policy decisions. Our team of highly-specialized economists deliver:

- Global travel data-sets with the broadest set of country, city, and state coverage available
- Travel forecasts that are directly linked to the economic and demographic outlook for origins and destinations
- Economic impact analysis that highlights the value of visitors, events, developments, and industry segments
- Policy analysis that informs critical funding, taxation, and travel facilitation decisions
- Market assessments that define market allocation and investment decisions

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Oxford Economics is one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC, we employ over 250 full-time staff, including 150 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

For more information:

info@tourismeconomics.com



Atascadero, CA Lodging Forecast

December 2024

Prepared for:



Context

Visit SLO CAL engaged Tourism Economics to prepare a lodging forecast of key indicators for Atascadero, CA and the following additional geographies (which will be delivered separately).

- San Luis Obispo County
- North County
- South County
- Arroyo Grande, CA
- Morro Bay, CA
- Paso Robles, CA
- Pismo Beach, CA
- San Luis Obispo, CA

This forecast relies on:

- Monthly STR hotel data through October 2024;
- Weekly STR hotel data through November 30, 2024;
- Economic forecasts prepared by Oxford Economics, parent company of Tourism Economics; and,
- Assumptions on the future path of the tourism sector in the context of economic trends.

Due to standard forecast variability, future hotel performance may vary from the estimates presented in this forecast.

Forecast Tables

Annual

Forecast Table: Annual

Atascadero, CA

	Supply	Demand	Occ.	ADR	RevPAR	Room Revenue	Supply	Demand	Occ.	ADR	RevPAR	Room Revenue	Supply	Demand	Occ.	ADR	RevPAR	Room Revenue
Levels							Growth						Relative to 2019					
2019	181,405	118,159	65.1%	\$120.22	\$78.31	\$14,205,129							0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2020	207,085	92,793	44.8%	\$117.01	\$52.43	\$10,857,543	14.2%	-21.5%	-31.2%	-2.7%	-33.0%	-23.6%	14.2%	-21.5%	-31.2%	-2.7%	-33.0%	-23.6%
2021	225,205	140,530	62.4%	\$144.40	\$90.11	\$20,293,058	8.8%	51.4%	39.3%	23.4%	71.9%	86.9%	24.1%	18.9%	-4.2%	20.1%	15.1%	42.9%
2022	225,205	151,165	67.1%	\$143.29	\$96.18	\$21,659,902	0.0%	7.6%	7.6%	-0.8%	6.7%	6.7%	24.1%	27.9%	3.1%	19.2%	22.8%	52.5%
2023	225,205	143,737	63.8%	\$145.72	\$93.00	\$20,944,723	0.0%	-4.9%	-4.9%	1.7%	-3.3%	-3.3%	24.1%	21.6%	-2.0%	21.2%	18.8%	47.4%
2024	220,630	141,883	64.3%	\$142.19	\$91.44	\$20,174,379	-2.0%	-1.3%	0.8%	-2.4%	-1.7%	-3.7%	21.6%	20.1%	-1.3%	18.3%	16.8%	42.0%
2025	225,205	142,895	63.5%	\$142.08	\$90.15	\$20,302,434	2.1%	0.7%	-1.3%	-0.1%	-1.4%	0.6%	24.1%	20.9%	-2.6%	18.2%	15.1%	42.9%
2026	225,205	144,753	64.3%	\$144.10	\$92.62	\$20,859,552	0.0%	1.3%	1.3%	1.4%	2.7%	2.7%	24.1%	22.5%	-1.3%	19.9%	18.3%	46.8%

Source: STR, Tourism Economics

Forecast Tables

Quarterly

Forecast Table: Quarterly
Atascadero, CA

Supply Demand Occ. ADR RevPAR Room revenue							Supply Demand Occ. ADR RevPAR Room revenue							Supply Demand Occ. ADR RevPAR Room revenue						
Levels							Growth							Relative to 2019						
2022 Q1	55,530	35,176	63.3%	\$116.46	\$73.77	\$4,096,546	0.0%	42.7%	42.7%	4.6%	49.3%	49.3%	24.1%	50.1%	20.9%	11.8%	35.1%	67.7%		
Q2	56,147	41,369	73.7%	\$149.77	\$110.35	\$6,195,966	0.0%	9.2%	9.2%	1.5%	10.8%	10.8%	24.1%	28.5%	3.5%	16.8%	21.0%	50.2%		
Q3	56,764	41,608	73.3%	\$161.65	\$118.49	\$6,725,960	0.0%	1.2%	1.2%	-1.3%	-0.2%	-0.2%	24.1%	20.5%	-3.0%	21.9%	18.3%	46.8%		
Q4	56,764	33,012	58.2%	\$140.60	\$81.77	\$4,641,431	0.0%	-10.5%	-10.5%	-0.7%	-11.1%	-11.1%	24.1%	18.0%	-5.0%	28.8%	22.3%	51.9%		
2023 Q1	55,530	31,073	56.0%	\$127.86	\$71.55	\$3,972,995	0.0%	-11.7%	-11.7%	9.8%	-3.0%	-3.0%	24.1%	32.6%	6.8%	22.7%	31.0%	62.7%		
Q2	56,147	38,786	69.1%	\$154.88	\$106.99	\$6,007,346	0.0%	-6.2%	-6.2%	3.4%	-3.0%	-3.0%	24.1%	20.5%	-2.9%	20.8%	17.3%	45.6%		
Q3	56,764	40,268	70.9%	\$159.27	\$112.99	\$6,413,669	0.0%	-3.2%	-3.2%	-1.5%	-4.6%	-4.6%	24.1%	16.6%	-6.1%	20.1%	12.8%	40.0%		
Q4	56,764	33,610	59.2%	\$135.40	\$80.17	\$4,550,713	0.0%	1.8%	1.8%	-3.7%	-2.0%	-2.0%	24.1%	20.1%	-3.3%	24.0%	20.0%	48.9%		
2024 Q1	55,530	28,274	50.9%	\$117.57	\$59.86	\$3,324,171	0.0%	-9.0%	-9.0%	-8.0%	-16.3%	-16.3%	24.1%	20.6%	-2.8%	12.8%	9.6%	36.1%		
Q2	56,147	38,775	69.1%	\$153.12	\$105.75	\$5,937,413	0.0%	0.0%	0.0%	-1.1%	-1.2%	-1.2%	24.1%	20.5%	-3.0%	19.5%	15.9%	43.9%		
Q3	56,764	41,224	72.6%	\$155.43	\$112.88	\$6,407,589	0.0%	2.4%	2.4%	-2.4%	-0.1%	-0.1%	24.1%	19.3%	-3.9%	17.2%	12.7%	39.9%		
Q4	52,189	33,610	64.4%	\$134.04	\$86.32	\$4,505,205	-8.1%	0.0%	8.8%	-1.0%	7.7%	-1.0%	14.1%	20.1%	5.2%	22.8%	29.2%	47.4%		
2025 Q1	55,530	28,415	51.2%	\$117.10	\$59.92	\$3,327,429	0.0%	0.5%	0.5%	-0.4%	0.1%	0.1%	24.1%	21.2%	-2.4%	12.4%	9.7%	36.2%		
Q2	56,147	38,969	69.4%	\$153.12	\$106.28	\$5,967,100	0.0%	0.5%	0.5%	0.0%	0.5%	0.5%	24.1%	21.1%	-2.5%	19.5%	16.5%	44.6%		
Q3	56,764	41,430	73.0%	\$155.43	\$113.45	\$6,439,627	0.0%	0.5%	0.5%	0.0%	0.5%	0.5%	24.1%	19.9%	-3.4%	17.2%	13.2%	40.6%		
Q4	56,764	34,081	60.0%	\$134.04	\$80.48	\$4,568,278	8.8%	1.4%	-6.8%	0.0%	-6.8%	1.4%	24.1%	21.8%	-1.9%	22.8%	20.4%	49.5%		
2026 Q1	55,530	28,700	51.7%	\$118.50	\$61.25	\$3,401,032	0.0%	1.0%	1.0%	1.2%	2.2%	2.2%	24.1%	22.4%	-1.4%	13.7%	12.2%	39.3%		
Q2	56,147	39,203	69.8%	\$155.42	\$108.52	\$6,092,946	0.0%	0.6%	0.6%	1.5%	2.1%	2.1%	24.1%	21.8%	-1.9%	21.3%	18.9%	47.7%		
Q3	56,764	42,259	74.4%	\$157.14	\$116.99	\$6,640,672	0.0%	2.0%	2.0%	1.1%	3.1%	3.1%	24.1%	22.3%	-1.5%	18.5%	16.8%	45.0%		
Q4	56,764	34,592	60.9%	\$136.59	\$83.24	\$4,724,902	0.0%	1.5%	1.5%	1.9%	3.4%	3.4%	24.1%	23.6%	-0.4%	25.1%	24.5%	54.6%		

Source: STR, Tourism Economics

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For more information:

info@tourismeconomics.com



CITY OF ATASCADERO
ADVISORY BOARD FOR THE ATASCADERO
TOURISM BUSINESS IMPROVEMENT DISTRICT
STAFF REPORT

Item B4

2/19/25

ATBID Advisory Board Review
Monthly Meeting Times

RECOMMENDATION:

ATBID Advisory Board to discuss and provide staff direction to move meeting times on the 3rd Wednesday of the month from 2:30 pm – 4:30 pm to 1:00 pm – 3:00 pm.

DISCUSSION:

Chapter 16 of Title 3 of the City of Atascadero’s Municipal Code comprises the governing mandate of the Advisory Board for the Atascadero Tourism Business Improvement District. Pursuant to Section 3-16.08, ATBID’s Board shall meet “no less than quarterly.”

Historically, the ATBID Board meets once monthly on the third Wednesday of the month from January through June, does not hold a meeting in July, resumes monthly meetings from August through November, and does not hold a meeting in December.

The ATBID Advisory Board meeting times are currently from 2:30 pm until 4:30 pm. The ATBID Board would like to consider a change in the times to make it easier for Board Members to attend by shifting the new time to 1 pm until 3 pm.

FISCAL IMPACT:

None.

ATTACHMENTS:

None.



CITY OF ATASCADERO

ADVISORY BOARD FOR THE ATASCADERO TOURISM BUSINESS IMPROVEMENT DISTRICT STAFF REPORT

Item B5

2/19/25

Budget Reports and Performance Metrics

RECOMMENDATION:

ATBID Advisory Board receive and file the Budget Reports and Performance Metrics.

DISCUSSION:

The ATBID summary and expenditure reports show the expenditures that have been submitted through December 2024 along with the Transient Occupancy Tax (TOT). The new TBID Summary for 24-25 along with the 24-25 Expenditure Detail Report have also been included as attachments to this report.

The STR Report and the Community Performance Report for Atascadero are both included to review occupancy and other marketing indicators as a benchmark to see how we are performing as a Destination.

FISCAL IMPACT:

None.

ATTACHMENTS:

1. ATBID Expenditure Detail Report (FY 24-25)
2. ATBID Summary 24-25
3. Tourism TOT report 02-12-2025
4. SLOCAL Monthly STR Report 12-2024
5. SLOCAL Monthly Community Performance Report 12-2024

expdetl.rpt
02/12/2025 3:55PM
Periods: 0 through 6

Expenditure Detail Report

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
635 Atascadero Tourism Bus Improv Dist Fund
0000 Atascadero Tourism Bus Improv Dist

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
0000.6000000 Operating Services and Supplies						
0000.6050000 Office Expense						
0000.6050000 Office Expense	250.00	0.00	0.00	0.00	250.00	0.00
Total Office Expense	250.00	0.00	0.00	0.00	250.00	0.00
0000.6070000 Advertising						
0000.6070000 Advertising	180,000.00	0.00	0.00	0.00	180,000.00	0.00
0000.6077025 Digital Media Advertising	0.00	0.00	0.00	0.00	0.00	0.00
7/1/2024 po PO 02656				127,000.00		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 0						
7/2/2024 ap IN 17543						
Line Description: SECURE WEB HOSTING						
Vendor: 07343 CLEVER CONCEPTS, INC. Check # 179057						
7/31/2024 ap IN 12089						
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 179909						
7/31/2024 po LI 12089				-584.30		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 179909						
7/31/2024 ap IN 12090						
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 179909						

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02/12/2025 3:55PM
Periods: 0 through 6

Expenditure Detail Report

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
635 Atascadero Tourism Bus Improv Dist Fund
0000 Atascadero Tourism Bus Improv Dist

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
0000.6077025 Digital Media Advertising	(Continued)					
7/31/2024 po LI 12090 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909					-97.88	
7/31/2024 ap IN 11965 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179758		4,257.89				
7/31/2024 po LI 11965 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179758					-4,257.89	
8/1/2024 ap IN 17697 Line Description: SECURE WEB HOSTING Vendor: 07343 CLEVER CONCEPTS, INC. Check # 178924		55.00				
8/31/2024 po LI 12004 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179758					-1,901.38	
8/31/2024 ap IN 12004 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179758		1,901.38				
9/3/2024 ap IN 17849 Line Description: WEBSITE MAINTENANCE Vendor: 07343 CLEVER CONCEPTS, INC. Check # 179329		95.00				

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02/12/2025 3:55PM
Periods: 0 through 6

Expenditure Detail Report

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
635 Atascadero Tourism Bus Improv Dist Fund
0000 Atascadero Tourism Bus Improv Dist

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
0000.6077025 Digital Media Advertising	(Continued)					
9/30/2024 ap IN 12083 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909		7,912.68		000		
9/30/2024 po LI 12083 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909					-7,912.68	
10/31/2024 ap IN 12111 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 180154		6,699.00		000		
10/31/2024 po LI 12111 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 180154					-6,699.00	
10/31/2024 ap IN 12121 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 180040		13,420.11		000		
10/31/2024 po LI 12121 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 180040					-13,420.11	
11/30/2024 ap IN 12164 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 180313		19,411.35		000		

expdetl.rpt
02/12/2025 3:55PM
Periods: 0 through 6

Expenditure Detail Report

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
635 Atascadero Tourism Bus Improv Dist Fund
0000 Atascadero Tourism Bus Improv Dist

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
0000.6077025 Digital Media Advertising	(Continued)					
11/30/2024 po LI 12164				-19,411.35		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 180313						
12/31/2024 ap IN 12188		2,359.50				
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 180659						
12/31/2024 po LI 12188				-2,359.50		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 180659						
12/31/2024 ap IN 12193		8,317.54				
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 180659						
12/31/2024 po LI 12193				-8,317.54		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 180659						
0000.6077025 Digital Media Advertising	0.00	65,166.63	65,166.63	62,038.37	-127,205.00	0.00
0000.6077060 Advertising	0.00	0.00	0.00	0.00	0.00	0.00
7/1/2024 po PO 02656				20,000.00		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 0						

expdetl.rpt
02/12/2025 3:55PM
Periods: 0 through 6

Expenditure Detail Report

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
635 Atascadero Tourism Bus Improv Dist Fund
0000 Atascadero Tourism Bus Improv Dist

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
0000.6077060 Advertising	(Continued)					
7/1/2024 po PO 02667 Line Description: FY 24/25 DESTINATION MARKETING Vendor: 00406 VISIT SLO CAL Check # 0				50,000.00		
7/1/2024 ap IN 230255 Line Description: 2024 SPONSORSHIP Vendor: 04221 CALIFORNIA MID-STATE FAIR Check # 178673		3,750.00				
8/22/2024 ap IN 5460 082224 Line Description: SLO CAL SUMMIT - CONFERENCE RE Vendor: 05498 U.S. BANK Check # 179481		700.00				
9/1/2024 ap IN 1 Line Description: VISIT ATASCADERO SPONSORSHIP O Vendor: 09459 AGM COMMUNITY PARTNERS Check # 179494		7,500.00				
9/6/2024 ap IN 14649 Line Description: FY25 MARKETING CO-OPS Vendor: 00406 VISIT SLO CAL Check # 179421		20,000.00				
9/18/2024 ap IN 12016 Line Description: FY25 BRAND ASSET RENEWAL - SLO Vendor: 06479 VERDIN Check # 179758		7,750.00				
9/30/2024 ap IN 12082 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909		1,184.14				

expdetl.rpt
02/12/2025 3:55PM
Periods: 0 through 6

Expenditure Detail Report

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
635 Atascadero Tourism Bus Improv Dist Fund
0000 Atascadero Tourism Bus Improv Dist

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
0000.6077060 Advertising	(Continued)					
9/30/2024 po LI 12082 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909				-1,184.14		
10/30/2024 ap IN 483 Line Description: WELCOME CENTER PISMO BEACH TV Vendor: 09478 SOUTH COUNTY CHAMBERS Check # 179895		2,500.00				
10/31/2024 ap IN 12112 Line Description: SLO CAL HOTEL BED CO-OP Vendor: 06479 VERDIN Check # 180040		4,666.00				
11/14/2024 ap IN 373588 Line Description: LEGAL AD - TBID Vendor: 00348 NEW TIMES Check # 180267		234.00				
11/28/2024 ap IN 374071 Line Description: ADS - TBID Vendor: 00348 NEW TIMES Check # 180267		234.00				
12/30/2024 ap IN 12156 Line Description: GET WORKING - NEW WEBSITE Vendor: 06479 VERDIN Check # 180523		3,795.00				
0000.6077060 Advertising	0.00	52,313.14	52,313.14	68,815.86	-121,129.00	0.00
Total Advertising	180,000.00	117,479.77	117,479.77	130,854.23	-68,334.00	137.96
0000.6400000 Operating Supplies						
Total Operating Supplies	0.00	0.00	0.00	0.00	0.00	0.00

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02/12/2025 3:55PM
Periods: 0 through 6

Expenditure Detail Report

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
635 Atascadero Tourism Bus Improv Dist Fund
0000 Atascadero Tourism Bus Improv Dist

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
0000.6500000 Contract Services						
0000.6500000 Contract Services	175,000.00	0.00	0.00	0.00	175,000.00	0.00
0000.6501125 Promotions Consultants	0.00	0.00	0.00	0.00	0.00	0.00
7/1/2024 po PO 02656				100,000.00		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 0						
7/31/2024 ap IN 11965						
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 179758						
7/31/2024 po LI 11965				-8,839.50		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 179758						
8/31/2024 ap IN 12004						
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 179758						
8/31/2024 po LI 12004				-15,018.00		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 179758						
9/30/2024 ap IN 12082						
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 179909						

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02/12/2025 3:55PM
Periods: 0 through 6

Expenditure Detail Report

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
635 Atascadero Tourism Bus Improv Dist Fund
0000 Atascadero Tourism Bus Improv Dist

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
0000.6501125 Promotions Consultants	(Continued)					
9/30/2024 po LI 12082 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909				-214.50		
9/30/2024 ap IN 12083 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909		9,737.50				
9/30/2024 po LI 12083 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909				-9,737.50		
9/30/2024 ap IN 12087 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909		2,500.00				
9/30/2024 po LI 12087 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 179909				-2,500.00		
10/31/2024 ap IN 12121 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 180040		10,406.00				
10/31/2024 po LI 12121 Line Description: DESTINATION MARKETING SERVICES Vendor: 06479 VERDIN Check # 180040				-10,406.00		

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02/12/2025 3:55PM

Periods: 0 through 6

Expenditure Detail Report

Page: 9

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
 635 Atascadero Tourism Bus Improv Dist Fund
 0000 Atascadero Tourism Bus Improv Dist

<u>Account Number</u>	<u>Adjusted Appropriation</u>	<u>Expenditures</u>	<u>Year-to-date Expenditures</u>	<u>Year-to-date Encumbrances</u>	<u>Balance</u>	<u>Prct Used</u>
0000.6501125 Promotions Consultants	(Continued)					
11/30/2024 ap IN 12164		10,463.17				
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 180313						
11/30/2024 po LI 12164				-10,463.17		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 180313						
12/31/2024 ap IN 12193		5,862.50				
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 180659						
12/31/2024 po LI 12193				-5,862.50		
Line Description: DESTINATION MARKETING SERVICES						
Vendor: 06479 VERDIN Check # 180659						
0000.6501125 Promotions Consultants	0.00	63,041.17	63,041.17	36,958.83	-100,000.00	0.00
0000.6502913 Web Consulting	0.00	0.00	0.00	0.00	0.00	0.00
10/3/2024 ap IN 18076		7,487.50				
Line Description: WEB DEVELOPMENT - VISITATASCAD						
Vendor: 07343 CLEVER CONCEPTS, INC. Check # 179648						
0000.6502913 Web Consulting	0.00	7,487.50	7,487.50	0.00	-7,487.50	0.00
0000.6509010 Other Professional Services	0.00	0.00	0.00	0.00	0.00	0.00
7/1/2024 je GJ JE25 07-12		2,291.67				
Line Description: ATBID Admin Service Fee-July						
8/1/2024 je GJ JE25 08-04		2,291.67				
Line Description: ATBID Admin Service Fee-August						

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02/12/2025 3:55PM
Periods: 0 through 6

Expenditure Detail Report

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
635 Atascadero Tourism Bus Improv Dist Fund
0000 Atascadero Tourism Bus Improv Dist

Account Number	Adjusted Appropriation	Expenditures	Year-to-date Expenditures	Year-to-date Encumbrances	Balance	Prct Used
0000.6509010 Other Professional Services	(Continued)					
9/1/2024 je GJ JE25 09-07 Line Description: ATBID Admin Service Fee- Sept		2,291.67				
11/18/2024 ap IN 948 Line Description: FALL FESTIVAL SPONSORSHIP Vendor: 08621 EN FUEGO EVENTS Check # 180464		2,000.00				
0000.6509010 Other Professional Services	0.00	8,875.01	8,875.01	0.00	-8,875.01	0.00
0000.6509032 Additional Promotional Services	0.00	0.00	0.00	0.00	0.00	0.00
7/1/2024 ap IN 909 Line Description: ATASCADERO FALL FESTIVAL GRANT Vendor: 08621 EN FUEGO EVENTS Check # 178683		20,000.00				
7/21/2024 ap IN 07212024 Line Description: MID-STATE FAIR TRANSPORTATION Vendor: 09414 SIERRA BRAVO ENTERPRISES, LLC Check # 178977		8,640.00				
9/6/2024 ap IN 14651 Line Description: SPARTAN CO-OP Vendor: 00406 VISIT SLO CAL Check # 179421		5,000.00				
9/27/2024 je GJ JE25 09-02 Line Description: ATBID Sponsorship-Grd lights		10,000.00				
11/8/2024 ap IN 24PR10 Line Description: NOVEMBER 2024 EVENT SPONSORSHI Vendor: 07251 GARAGISTE EVENTS, INC. Check # 179971		7,500.00				
0000.6509032 Additional Promotional Services	0.00	51,140.00	51,140.00	0.00	-51,140.00	0.00
Total Contract Services	175,000.00	130,543.68	130,543.68	36,958.83	7,497.49	95.72

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Periods: 0 through 6

Expenditure Detail Report

Page: 11

CITY OF ATASCADERO
07/01/2024 through 12/31/2024

235 Atascadero Tourism Bus Improv Dist
 635 Atascadero Tourism Bus Improv Dist Fund
 0000 Atascadero Tourism Bus Improv Dist

<i>Account Number</i>	<i>Adjusted Appropriation</i>	<i>Expenditures</i>	<i>Year-to-date Expenditures</i>	<i>Year-to-date Encumbrances</i>	<i>Balance</i>	<i>Prct Used</i>
0000.6600000 Professional Development						
0000.6600000 Professional Development	8,000.00	0.00	0.00	0.00	8,000.00	0.00
Total Professional Development	8,000.00	0.00	0.00	0.00	8,000.00	0.00
0000.6740000 Business Development						
Total Business Development	0.00	0.00	0.00	0.00	0.00	0.00
0000.6900000 Department Service Charges						
0000.6900000 Administration	4,220.00	0.00	0.00	0.00	4,220.00	0.00
Total Department Service Charges	4,220.00	0.00	0.00	0.00	4,220.00	0.00
Total Operating Services and Supplies	367,470.00	248,023.45	248,023.45	167,813.06	-48,366.51	113.16
0000.7000000 Special Purchases, Projects, and Studies						
0000.7800000 Community Funding						
0000.7805029 Opportunities Fund	65,000.00	0.00	0.00	0.00	65,000.00	0.00
Total Special Purchases, Projects, and Studies	65,000.00	0.00	0.00	0.00	65,000.00	0.00
0000.9000000 Debt Service & Other Uses						
0000.9400000 Cash Contributions						
Total Debt Service & Other Uses	0.00	0.00	0.00	0.00	0.00	0.00
Total Atascadero Tourism Bus Improv Dist	432,470.00	248,023.45	248,023.45	167,813.06	16,633.49	96.15
Grand Total	432,470.00	248,023.45	248,023.45	167,813.06	16,633.49	96.15

Atascadero Tourism Business Improvement District (ATBID) FundFUND
235TYPE
Special Revenue

		ACTUAL 6/30/2021	ACTUAL 6/30/2022	ACTUAL 6/30/2023	ACTUAL 6/30/2024	YTD ACTUAL* 2024-2025 through 12/31/2024	BUDGETED 2024-2025
REVENUES							
41530.6300	Taxes and Assessments	\$ 277,287	\$ 409,652	\$ 431,401	\$ 419,591	\$ 187,295	\$ 422,400
45920.0003	Assessment Penalties	-	933	3,904	657	233	-
46110.0000	Investment Earnings	2,027	(11,341)	2,966	30,734	-	19,790
	Total Revenue	279,314	399,244	438,271	450,982	187,527	442,190
EXPENSES							
6050000	Office Expense	-	264	-	(5)	-	250
6070000	Advertising	43,142	127,366	126,556	142,357	117,480	180,000
6400000	Operating Supplies	-	-	-	-	-	-
6500000	Contract Services **	106,295	143,436	163,051	220,803	137,419	175,000
6600000	Professional Development	-	731	-	475	-	8,000
6900000	Administration	2,774	4,106	4,353	4,202	1,875	4,220
7805029	Opportunities Funding***	-	-	-	-	-	65,000
	Total Expenses	152,211	275,903	293,960	367,832	256,774	432,470
NET INCOME/(LOSS)		127,103	123,341	144,311	83,150	(69,246)	9,720
BEGINNING AVAILABLE BALANCE		273,667	400,770	524,111	668,422	751,572	657,990
ENDING AVAILABLE BALANCE		\$ 400,770	\$ 524,111	\$ 668,422	\$ 751,572	\$ 682,326	\$ 667,710

*Actual numbers are unaudited, not yet finalized and are subject to change

** Contract Services

Special Events

Atascadero Fall Festival Sponsorship 2024

\$ 20,000

Mid-State Fair Transportation

8,640

Spartan Race Co-Sponsorship

5,000

Sunken Garden Lights Sponsorship

10,000

Garagiste Events

7,500

Fall Festival Sponsorshi[

2,000

Web Consulting

7,488

Destination Marketing Services

63,041

Administrative Services Fee

13,750

\$ 137,419

City of Atascadero
 Tourism Report
 Transient Occupancy Tax Revenues

	Jul-Sep 1ST QTR	Oct-Dec 2ND QTR	Jan-Mar 3RD QTR	Apr-Jun 4TH QTR	TOTAL
Fiscal Year 2014	\$ 254,557.46	\$ 158,389.32	\$ 134,033.44	\$ 232,385.37	\$ 779,365.59
Fiscal Year 2015	\$ 262,246.00	\$ 171,527.07	\$ 204,920.33	\$ 261,362.41	\$ 900,055.81
Fiscal Year 2016	\$ 387,196.75	\$ 260,522.61	\$ 234,591.13	\$ 359,952.40	\$ 1,242,262.89
Fiscal Year 2017	\$ 441,814.34	\$ 259,716.23	\$ 236,432.90	\$ 399,564.75	\$ 1,337,528.22
Fiscal Year 2018	\$ 446,835.24	\$ 307,035.82	\$ 237,705.86	\$ 384,921.01	\$ 1,376,497.93
Fiscal Year 2019	\$ 442,255.82	\$ 305,426.85	\$ 236,855.54	\$ 406,434.26	\$ 1,390,972.47
Fiscal Year 2020	\$ 454,062.15	\$ 325,569.25	\$ 207,088.63	\$ 136,898.64	\$ 1,123,618.67
Fiscal Year 2021	\$ 348,012.06	\$ 275,644.27	\$ 241,653.81	\$ 503,542.34	\$ 1,368,852.48
Fiscal Year 2022 *	\$ 624,858.40	\$ 498,385.17	\$ 388,893.34	\$ 609,246.66	\$ 2,121,383.57
Fiscal Year 2023 *	\$ 625,917.25	\$ 470,541.39	\$ 347,201.52	\$ 583,045.37	\$ 2,026,705.53
Fiscal Year 2024 *	\$ 671,002.30	\$ 493,566.44	\$ 331,201.07	\$ 601,266.76	\$ 2,097,036.57
Fiscal Year 2025*	\$ 631,433.27	\$ 444,392.64			\$ 1,075,825.91

* This report includes receipts in the correct quarter earned, not in the quarter received. It will not be the same as the City's financial statements.

VISIT

SIO CAL

December 2024

ATBID | 2/19/25 | Item B5 | Attachment 4

	Current Month - December 2024 vs December 2023												Year to Date - December 2024 vs December 2023												Participation			
	Occ %		ADR		RevPAR		Percent Change from December 2023						Occ %		ADR		RevPAR		Percent Change from YTD 2023						Properties		Rooms	
	2024	2023	2024	2023	2024	2023	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold	2024	2023	2024	2023	2024	2023	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold	Census	Sample	Census	Sample
Arroyo Grande, CA+	51.7	47.5	106.68	113.42	55.18	53.88	8.9	-5.9	2.4	2.4	0.0	8.9	63.1		139.36		87.89								7	4	438	371
Atascadero, CA+	49.2	51.1	115.66	118.26	56.89	60.41	-3.7	-2.2	-5.8	-5.8	0.0	-3.7	62.7	63.8	143.01	145.71	89.71	93.00	-1.7	-1.8	-3.5	-5.5	-2.0	-3.7	8	6	617	575
Cambria, CA+	60.6	58.7	202.34	189.56	122.56	111.24	3.2	6.7	10.2	10.2	0.0	3.2	63.7	61.7	211.47	211.74	134.76	130.75	3.2	-0.1	3.1	3.1	0.0	3.2	21	12	750	433
Morro Bay, CA+	52.2	49.4	128.54	119.95	67.11	59.27	5.7	7.2	13.2	13.5	0.2	5.9	62.2	61.0	152.29	148.42	94.70	90.51	2.0	2.6	4.6	6.7	2.0	4.0	31	7	969	323
Paso Robles, CA+	53.4	53.3	171.86	176.52	91.86	94.11	0.2	-2.6	-2.4	-0.5	1.9	2.2	64.9	69.3	199.53	197.65	129.50	137.05	-6.4	1.0	-5.5	-3.7	1.9	-4.6	23	14	1465	1092
Pismo Beach, CA+	51.9	53.5	190.81	193.79	99.00	103.59	-2.9	-1.5	-4.4	-4.9	-0.5	-3.4	64.7	64.6	232.55	236.51	150.41	152.73	0.2	-1.7	-1.5	-2.7	-1.2	-1.0	30	18	2112	1657
San Luis Obispo, CA+	59.8	56.4	146.17	150.28	87.41	84.73	6.1	-2.7	3.2	-0.4	-3.5	2.4	69.0	67.7	178.32	179.24	122.97	121.35	1.9	-0.5	1.3	0.6	-0.7	1.1	38	21	2432	1675
San Simeon, CA+	44.6	46.7	128.18	117.91	57.13	55.09	-4.6	8.7	3.7	3.7	0.0	-4.6	56.3	56.2	138.52	140.54	78.02	78.99	0.2	-1.4	-1.2	-1.2	0.0	0.2	10	5	601	348
Five Cities+	52.0	52.4	183.62	186.82	95.52	97.98	-0.8	-1.7	-2.5	-2.8	-0.3	-1.1	64.6	64.8	227.04	226.36	146.68	146.62	-0.3	0.3	0.0	-0.8	-0.8	-1.1	47	26	2954	2221
North Coast+	53.6	53.4	169.42	157.42	90.73	84.02	0.3	7.6	8.0	8.0	0.0	0.3	60.9	60.1	178.24	178.12	108.49	107.00	1.3	0.1	1.4	1.4	0.0	1.3	40	17	1518	781
North County+	52.2	52.6	155.40	158.70	81.07	83.48	-0.8	-2.1	-2.9	-1.6	1.3	0.5	64.2	67.6	182.60	182.18	117.29	123.16	-5.0	0.2	-4.8	-4.1	0.7	-4.3	32	20	2109	1667
South County+	55.5	54.3	165.63	169.61	92.00	92.05	2.4	-2.3	-0.0	-1.8	-1.8	0.5	66.6	66.1	204.11	204.46	135.99	135.22	0.7	-0.2	0.6	-0.2	-0.8	-0.1	84	47	5368	3896
San Luis Obispo County	54.2	53.3	160.09	160.18	86.80	85.32	1.8	-0.1	1.7	1.1	-0.7	1.1	64.8	65.1	190.28	189.94	123.36	123.58	-0.4	0.2	-0.2	-0.2	-0.1	-0.4	196	91	10223	6667

SOURCE: CoStar, STR, LLC. REPUBLICATION OR OTHER REUSE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR, LLC IS STRICTLY PROHIBITED.



Community Performance Report

San Luis Obispo County, December 2024

Hotel Performance

2024 calendar year-end hotel performance for San Luis Obispo County totaled 2.4M room nights, down 0.4% YOY. December hotel statistics were more positive for the county, with demand +1.1% YOY, and growth in occupancy (+1.8%), RevPAR (+1.7%), and revenue (+1.1%). Short term rentals boosted room revenue 9.6% given growth in ADR (+6.9%) and demand (+2.6%). In 2024 calendar year, comp set occupancy was led by Santa Barbara County (67.8%, +1.8% YOY). Two markets saw occupancy decrease YOY (CA, -0.2%; SLO County, -0.4%). Community occupancy was led by the City of San Luis Obispo (68.9%). Half of the communities reported growth in occupancy, with Cambria in the lead (+3.3% YOY).

TOT Revenue

TOT for the month of November totaled \$4.1M, down 0.5% YOY. Unincorporated communities led collections with \$1.0M, down 9.6% YOY, followed by Pismo Beach at \$967.9K (-4.5%) and Paso Robles (+8.5%). Grover Beach notably reported a 24.3% YOY gain to \$43K.

Visitor Arrivals

Visitors to San Luis Obispo County in 2024 Q3 (FY 2025 Q1) were 2.3M, down 0.4% from the same quarter one year ago. International visitors grew 1.7% YOY, but other visitor categories declined slightly: day (-0.7%), overnight (-0.2%), and domestic (-0.4%). This was the second consecutive quarter for estimated decreases to domestic, day, and overnight visitation.

Previous Quarter

Spending for 2024 Q3 reached \$280.6M, down 1.4% from one year ago. The top origin markets were all domestic, led by Santa Maria-Santa Barbara (\$41.1M), Los Angeles (\$36.3M), Fresno (\$21.5M), and San Francisco (\$19.5M). Domestic visitor spend decreased 1.4% YOY, while international visitor spend was nearly level at -0.1%. Restaurants and Dining led domestic spending categories at \$87.3M (-1.4% YOY). Categories which saw growth YOY were Hotels & Lodging (+9.2%), and Other (+6.2%).



171.8K
Hotel Demand
▲ 1.1% YOY - Monthly



\$4,054,741
Transient Occupancy Tax
▼ -0.5% YOY - Monthly



\$280.6M
Total Spending for 2024 Q3
▼ -1.4% YOY - Quarterly



2.3M
Visitors for 2024 Q3
▼ -0.4% YOY - Quarterly



Community Lodging

San Luis Obispo County, December 2024

Date December 2024 Location Atascadero, CA % Change YOY Report Monthly Based On Fiscal

Atascadero, CA Hotel Performance - Monthly

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
49.2%	\$116	\$57	19.1K	9.4K	\$1.1M
▼ -3.7%	▼ -2.2%	▼ -5.8%	▲ 0.0%	▼ -3.7%	▼ -5.8%
YOY					

Transient Occupancy Tax Revenue

November 2024 - Monthly

\$4,054,741

San Luis Obispo County

▼ -0.5% YOY

Hotel Performance by Community

December 2024 - Monthly

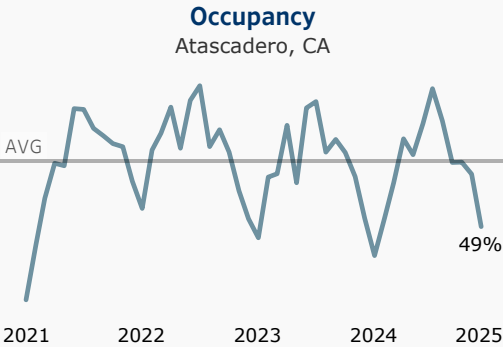
	Occupancy	ADR	RevPAR
Atascadero, CA	49.2%	\$116	\$57
Cambria, CA	60.6%	\$202	\$123
Five Cities	52.0%	\$184	\$96
Morro Bay, CA	52.2%	\$129	\$67
North Coast	53.6%	\$169	\$91
North County	52.2%	\$155	\$81
Paso Robles, CA	53.4%	\$172	\$92
Pismo Beach, CA	51.9%	\$191	\$99
San Luis Obispo County	54.2%	\$160	\$87
San Luis Obispo, CA	59.8%	\$146	\$87
San Simeon, CA	44.6%	\$128	\$57
South County	55.5%	\$166	\$92

Transient Occupancy Tax

Monthly, % Change YOY

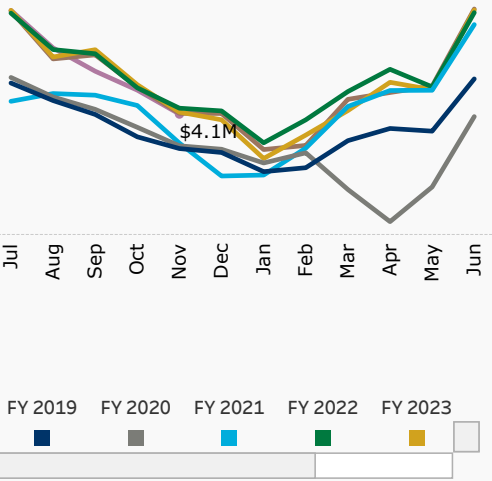
Unincorporated	1,010,986, ▼ -9.6%
Pismo Beach	967,910, ▼ -4.5%
Paso Robles	849,092, ▲ 8.5%
San Luis Obispo	823,018, ▲ 9.3%
Morro Bay	275,715, ▼ -4.7%
Arroyo Grande	85,052, ▲ 0.9%
Grover Beach	42,967, ▲ 24.3%

Occupancy



Transient Occupancy Tax

San Luis Obispo County
Total - Fiscal Year





Lodging Summary - Hotels and Short Term Rentals

San Luis Obispo County, December 2024

Date	December 2024	STR	Atascadero, CA	AirDNA	Atascadero	Based On	Fiscal	YOY Change	YOY
Aggregate Lodging									
		Occupancy	ADR	RevPAR	Supply	Demand	Revenue		
		45.6%	\$162.89	\$74.30	25.8K	11.8K	\$1.9M		
YOY		▼ -2.0%	▲ 1.5%	▼ -0.5%	▲ 0.6%	▼ -1.4%	▲ 0.1%		
YTD Fiscal		58.6%	\$191.57	\$112.19	150.2K	87.9K	\$16.8M		
YTD YOY		▼ -0.5%	▲ 3.1%	▲ 2.5%	▼ -2.1%	▼ -2.6%	▲ 0.4%		
Hotels: Atascadero, CA									
		49.2%	\$115.66	\$56.89	19.1K	9.4K	\$1.1M		
YOY		▼ -3.7%	▼ -2.2%	▼ -5.8%	▲ 0.0%	▼ -3.7%	▼ -5.8%		
YTD Fiscal		65.4%	\$147.65	\$96.62	109.0K	71.3K	\$10.5M		
YTD YOY		▲ 0.6%	▼ -0.5%	▲ 0.1%	▼ -4.0%	▼ -3.5%	▼ -4.0%		
Short Term Rentals: Atascadero									
		35.3%	\$352.19	\$124.45	6.6K	2.3K	\$826.6K		
YOY		▲ 6.5%	▲ 0.0%	▲ 6.7%	▲ 2.3%	▲ 9.2%	▲ 9.2%		
YTD Fiscal		40.4%	\$379.78	\$153.36	41.2K	16.6K	\$6.3M		
YTD YOY		▼ -2.1%	▲ 7.2%	▲ 5.0%	▲ 3.4%	▲ 1.2%	▲ 8.6%		

Lodging Revenue & Contribution

Atascadero, CA (Hotels) and Atascadero (Short Term Rentals)

% Share Short Term Rentals

Aggregate Revenue

Month	Aggregate Revenue	% Share Short Term Rentals
Jan-24	\$1.4M	36%
Feb-24	\$1.6M	35%
Mar-24	\$2.1M	34%
Apr-24	\$2.8M	30%
May-24	\$2.7M	34%
Jun-24	\$3.5M	37%
Jul-24	\$3.9M	38%
Aug-24	\$3.4M	38%
Sep-24	\$2.8M	35%
Oct-24	\$2.4M	34%
Nov-24	\$2.3M	39%
Dec-24	\$1.9M	43%

Source: CoStar Group, STR, LLC. Republication or other reuse of this data without the express written permission of STR, LLC is strictly prohibited. ©Visit SLO CAL ; AirDNA (Listing Type = Entire Place, Private Rooms, Shared Rooms, Hotel Rooms, and Not Reported). Short Term Rental data includes all active, 30-day or less rentals regardless of license status and/or collection or payment of T.. **SYMPHONY | TOURISM ECONOMICS**



Monthly Visitation San Luis Obispo County, December 2024

Date: December 2024

 Report: Monthly

 Based On: Fiscal



75.1%

 Repeat Share



1.8 Days

 Avg Trip Duration



77.2%

 Overnight Visitors

Top 15 Points of Interest December 2024 - Monthly

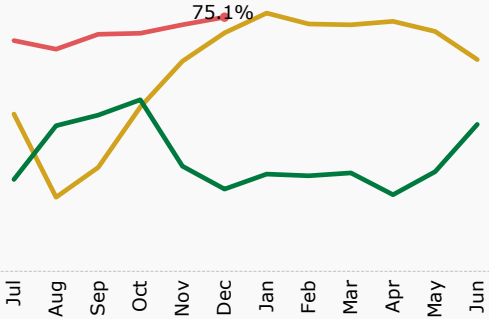
	% Overnight	% Repeat	% Share of Total
San Luis Obispo	76.1%	68.7%	23.6%
Pismo Beach	75.2%	69.7%	22.1%
Paso Robles	70.2%	67.6%	17.7%
Morro Bay	76.4%	68.0%	11.5%
Atascadero	70.6%	68.6%	10.0%
46 East Paso Wine Country	59.6%	58.8%	9.3%
Downtown Pismo Beach	74.7%	59.7%	7.8%
Arroyo Grande	77.7%	66.8%	6.3%
Grover Beach	79.9%	67.9%	5.8%
Downtown Paso Robles	75.8%	61.3%	5.6%
Cambria	77.3%	68.0%	5.2%
Downtown Cambria	77.3%	68.0%	4.9%
Nipomo	71.9%	69.1%	4.1%
Templeton	67.9%	64.2%	3.8%
Cayucos	77.3%	72.4%	0.0%

Top 10 Domestic Origin Markets

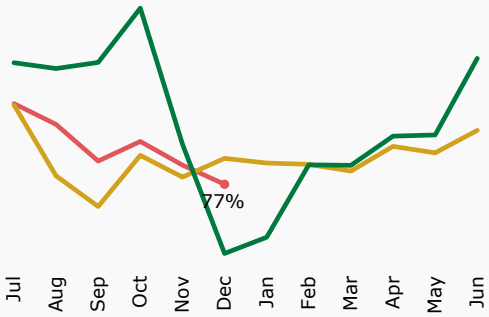
December 2024 - Monthly, % Share of Trips

Los Angeles, CA	20.4%
Fresno-Visalia, CA	19.8%
San Francisco-Oakland-San Jose, CA	12.3%
Bakersfield, CA	9.9%
Sacramento-Stockton-Modesto, CA	7.4%
Monterey-Salinas, CA	4.0%
San Diego, CA	3.6%
Palm Springs, CA	2.5%
Santa Barbara-Santa Maria, CA	2.3%
Phoenix, AZ	1.9%

Share of Repeat Visits to SLO County



Share of Overnight Visits to SLO County



FY 2023

 FY 2024

 FY 2025

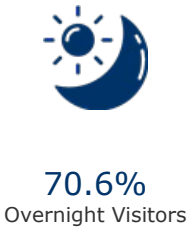




Community Cross-Visitation

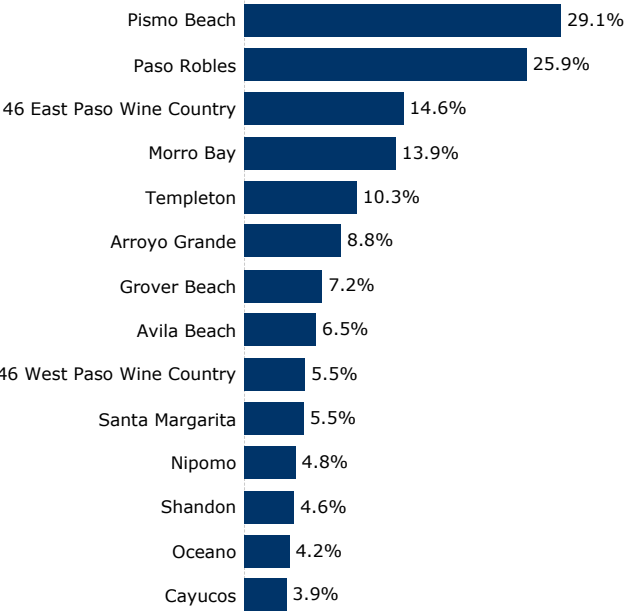
Atascadero, December 2024

Date: December 2024 Report: Monthly Based On: Fiscal Primary: Atascadero



Top Cross-Visited Communities

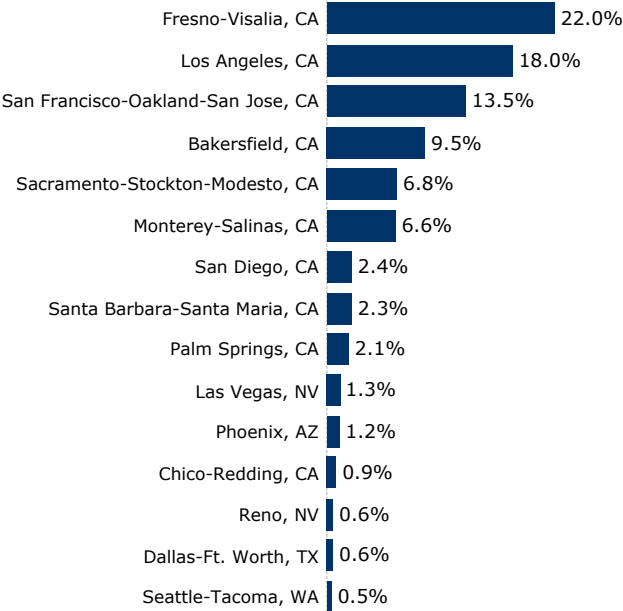
From Atascadero



Communities visited by those starting their trip in Atascadero

Top Origin Markets

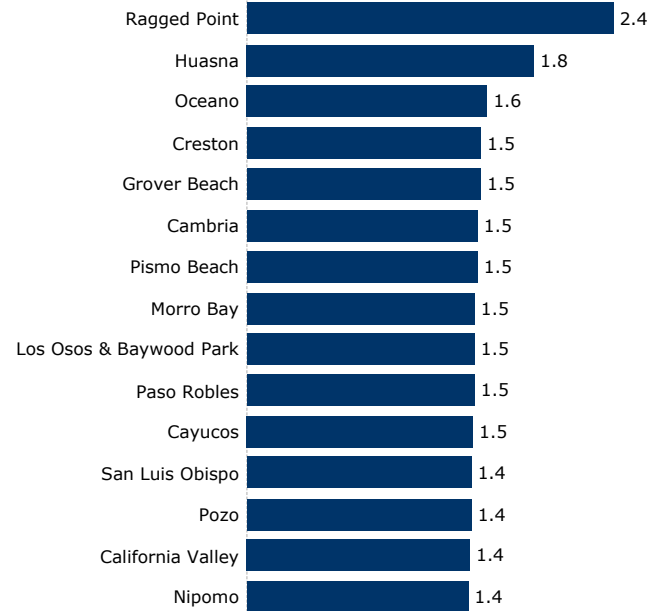
Primary Community Visited: Atascadero



Origin markets of those starting their trip in Atascadero who cross-visited elsewhere

Top Average Communities Visited per Trip

All Community Visitors



Average number of communities visited per trip during December 2024 (Month)

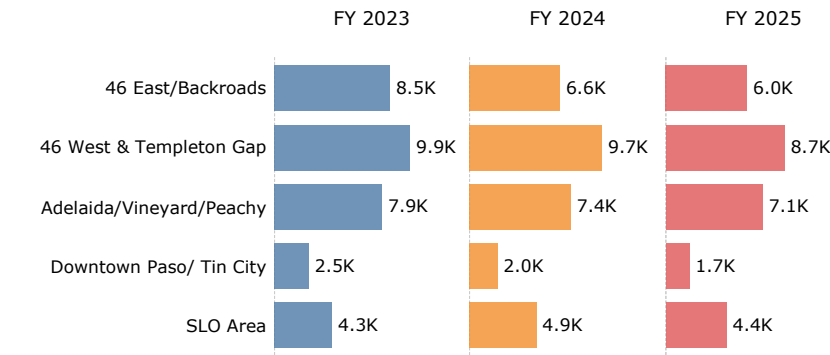


Community Benchmark Wineries

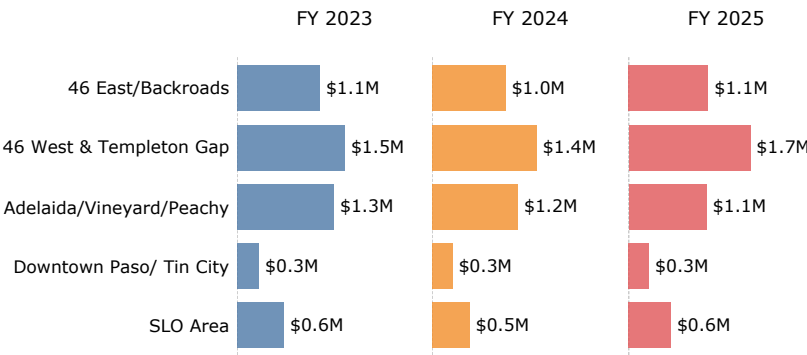
San Luis Obispo County, December 2024

Date	% Change	Report	Based On	Region	All
December 2024	YOY	Monthly	Fiscal		
Visitors	Tasting Room Sales	DTC Total Sales	On-Site Event Sales		
0.14M	\$16.0M	\$57.4M	\$0.69M	Avg Visitors	Avg Tasting Room Sales
▼ -9.2%	▼ -10.7%	▲ 3.0%	▼ -21.6%	660	78,609
					Avg DTC Total Sales
					274,578
					Avg On-Site Event Sales
					6,556
				▼ -9.2%	▼ -10.7%
					▲ 3.0%
					▼ -21.6%
	YOY				YOY

SLO CAL Region Visitation by Year
December 2024 - Monthly



Average DTC Sales by Region
December 2024 - Monthly



Source: Community Benchmark

