



AGENDA

Visit SLO CAL Advisory Committee

Visit SLO CAL Advisory Committee Agenda

Thursday, June 3, 2021

3:00 pm – 4:30 pm

Video Conference:

<https://us02web.zoom.us/j/82184076159?pwd=T09PbXN4QnlSejdheW00My9yd3E1UT09&from=addon>

Meeting ID: 821 8407 6159

Call-In: (669) 900-6833

1. CALL TO ORDER

2. PUBLIC COMMENT (On Non-Agenda Items)

CONSENT AGENDA

C. Davison

3. Approval of October 1, 2020 Advisory Committee Meeting Minutes

The Chair will ask for Committee approval of the October 1, 2020 Visit SLO CAL Advisory Committee Meeting Minutes.

BUSINESS ITEMS

C. Davison

Note: Documentation for some of the agenda items is provided in the agenda packet. Please review in advance in order to provide sufficient time for discussion. Also, please be sure to submit any questions on the documentation to Brendan@SLOCAL.com 72 hours in advance of the meeting.

4. COVID-19 Recovery Strategy (20 min)

Staff will briefly review and facilitate a conversation on Visit SLO CAL's COVID-19 recovery strategy, asking the following questions of the Committee:

- What feedback do you have on Visit SLO CAL's COVID-19 recovery strategy?*
- What feedback have you heard in your communities about Visit SLO CAL's COVID-19 response efforts?*
- In your specific communities, what continued or new response efforts would provide the greatest impact moving forward?*

5. Equity, Diversity & Inclusion Conversation (20 min)

Staff will provide an update and facilitate a conversation on Visit SLO CAL's recent and upcoming Equity, Diversity & Inclusion (EDI) efforts, asking the following questions of the Committee:

- What feedback do you have on Visit SLO CAL's EDI work?*
- How can we continue to partner with you on this important work and what does success look like?*
- Are there unintended consequences to this work that we need to be aware of?*

6. Experience SLO CAL 2050 Conversations (20 min)

Staff will facilitate a conversation on current Visit SLO CAL Board-prioritized Experience SLO CAL 2050 (ESC 2050) recommendations that government stakeholders can assist in driving forward, asking the following questions of the Committee:

- What overall feedback do you have on the direction of this work?*
- Where and how would you like to partner with Visit SLO CAL in the coming year?*

7. Travel Trade & Marketing Efforts (20 min)

Staff will facilitate a conversation on Visit SLO CAL's planned travel trade and marketing efforts, asking the following question of the Committee:

- a. What feedback do you have on Visit SLO CAL's travel trade and marketing strategies for FY 2022?*

ADJOURN.

Brown Act Notice: Each speaker is limited to two minutes of public comment for items not on the agenda. Public comment for each agenda item will be called for separately and is also limited to 2 minutes per speaker. State law does not allow the committee to discuss or take action on issues not on the agenda, except that members of the committee may briefly respond to statements made or questions posed by the person giving public comment. Staff may be directed by the committee to follow-up on such items and/or place them on the next board agenda. The order of agenda items is listed for reference and items may be taken in any order deemed appropriate by the Advisory Committee.

ADA Notice: Meeting facilities are accessible to persons with disabilities. If you require special assistance to participate in the meeting, notify Brendan Pringle at (805) 541-8000 at least 48 hours prior to the meeting.



MINUTES

Visit SLO CAL Advisory Committee

Visit SLO CAL Advisory Committee Meeting Minutes

Thursday, October 1, 2020

3:00pm

<https://us02web.zoom.us/j/86525263459> Meeting ID: 865 2526 3459

Call-In Phone Number: (669) 900-6833

1. CALL TO ORDER: Clint Pearce

PRESENT (VIA VIDEO CONFERENCE): Matthew Bronson, Scott Collins, Red Davis, Tom Frutche, Lan George, Erik Howell, Derek Johnson, Desi Lance, Jim Lewis, Steve Martin, Whitney McDonald, Heather Newsom, Guy Savage

ABSENT: Lynn Compton, Heidi Harmon, Rachelle Rickard

STAFF PRESENT: Chuck Davison, Lisa Verbeck, Brendan Pringle, Kyla Boast, Taylor Grantham, Ashley Mastako, Eric Parker, Vanessa Rodriguez

BOARD MEMBERS PRESENT: Jed Bickel, Kathy Bonelli, John Conner, Mark Eads, Aaron Graves, Toni LeGras, Amit Patel, Clint Pearce

MARKETING COMMITTEE MEMBERS PRESENT: Jim Allen, Terrie Banish, Stacie Jacob

Call to Order by Pearce at 3:04 pm.

2. PUBLIC COMMENT (On Non-Agenda Items)

None.

ANNOUNCEMENTS

Davison noted that Visit SLO CAL has partnered with Tourism Economics to offer a first-of-its-kind Business Intelligence Report available to all lodging investors, partners and local government officials, and that the document is shared on the 27th of each month. He described the data provided on the reports.

CONSENT AGENDA

3. Approval of February 14, 2020 Advisory Committee Meeting Minutes

Public Comment – None.

Committee Discussion.

ACTION: Moved by Johnson/Frutche to approve the Consent Agenda as presented.

BUSINESS ITEMS

4. COVID-19 Response

Davison recapped Visit SLO CAL's COVID-19 response efforts, including proactive efforts, resources provided by the organization and advocacy efforts. Visit SLO CAL asked the following questions from the committee:

What feedback have you heard in your communities about Visit SLO CAL's COVID-19 response efforts?

In your specific communities, what continued or new response efforts would provide the greatest impact moving forward?

Public Comment – None.

Committee Discussion. George noted that the Business Intelligence Report has been very helpful and thanked Visit SLO CAL for providing these monthly reports. Johnson thanked Visit SLO CAL for its leadership. He noted that the advocacy early on for the industry was huge, and that the weekly DMO calls and email updates were very helpful. He said that these efforts kept the region united. Savage echoed Johnson's comments and noted that even though the START plan didn't come into fruition, Visit SLO CAL's leadership in these planning efforts were beneficial to the community. Newsom complimented Visit SLO CAL's leadership and recognized its efforts to distribute information at the start of the pandemic when there was some confusion. Frutche highlighted Chili's as an example of a restaurant in Paso Robles that completely restructured itself in multiple business units to handle the new reality of a COVID-19 world, and asked if the communities should start thinking about how the tourism industry can restructure. He suggested that Visit SLO CAL should lead that thought process. Davison responded that this has been a conversation in Visit SLO CAL's DMO calls, and is part of Visit SLO CAL's Strategic Direction 2023 (SD 2023) imperative to "Lead the county in a collaborative resilience planning effort." He added that Visit SLO CAL is having some conversation with local tourism leaders about this topic. Howell said that Visit SLO CAL is a reassuring voice for tourism in the county and that its efforts have been helpful. As the County goes into the subsequent waves of COVID-19 outbreaks, he noted that Visit SLO CAL is uniquely positioned to make sure the industry stays safe and that residents are supportive. Davison noted that no outbreaks have been tied to the lodging community. He pointed out that many of SLO CAL's lodging properties are independently owned and operated, which means that the owners are your neighbors and want their resident employees and visitors to be safe. Davison applauded the efforts of SLO CAL's lodging community, and noted that Visit SLO CAL realizes that first and foremost SLO CAL needs to be considered a safe destination. Johnson noted that access to the data, particularly the Arrivist data, will help support tracking of COVID-19 recovery progress. He also noted that leading the marketing efforts for the countywide region and getting back into launching media will help San Luis Obispo. He recognized the importance of the new SD 2023 initiative of executing a "house of brands" strategy will be important to San Luis Obispo as well, in helping remind people of the unique qualities of each of SLO CAL's communities. Davison provided further detail on the "house of brands" strategy, and noted that Visit SLO CAL is shifting its advertising to highlight destinations in ways that were not as obvious before.

5. Equity & Inclusion

Davison noted that the Board formally adopted Visit SLO CAL's Equity & Inclusion (E&I) Statement, which was included in the agenda packet. Visit SLO CAL staff shared the Statement with its local destination partners, and have begun working with those who have formed their own committees on this effort. Staff has also built out a matrix, also included in the Agenda Packet, to track a variety of data points from organizational representation to media hosting and social posts. Davison added that the end goal behind the matrix is to be mindful of where the gaps are in equity and inclusion, and understand how Visit SLO CAL can tell a broader story. He clarified that the desire is not to be punitive, but rather to be "additive" in order to be more inclusive by expanding Visit SLO CAL's efforts and reach. Pearce noted that the Board of Directors is very proud of the work that the organization has done and he recognized the Board members who stepped up to help develop the Equity & Inclusion Statement and tracking matrix.

Visit SLO CAL asked the following questions from the committee:

What feedback do you have on Visit SLO CAL's Equity & Inclusion work?

How can we partner with you on this important work and what does success look like?

Are there unintended consequences to this work that we need to be aware of?

Public Comment – None.

Committee Discussion. Frutchev asked about the thought process behind the development of the Equity & Inclusion (E&I) Statement, and why the Statement highlights values and actions, but not the outcomes that the organization wishes to achieve. Davison first recognized Visit SLO CAL's former Director of Community Engagement & Advocacy, Derek Kirk, and Board Members Jed Bickel and Amar Sohi, for their work in the development of Visit SLO CAL's E&I Statement. He noted that once Visit SLO CAL has a baseline established, it will be developing the outcome goals it wants to achieve. Since Visit SLO CAL had not previously been tracking these metrics, it does not yet have a baseline. Davison added that once the organization has those goals, it needs to dig in to figure out: 1) Is Visit SLO CAL not intentionally target diverse demographics? and/or 2) Is there a reason diverse individuals didn't want to come here? Bickel noted that he asked the same question about outcomes initially, and noted that it will be important to understand the composition of SLO CAL's visitors in the coming years. He added that he's seen more diversity in-market in the last 3-4 months than ever before. Pearce echoed this observation.

Frutchev noted that he is happy to be involved, and that he appreciates that the journey started with Visit SLO CAL. Johnson noted that he appreciates Visit SLO CAL's efforts, and asked that the organization continue to train each of the communities. He noted that perhaps an outcome that can be measured is the impressions left with SLO CAL's visitors in-market 1) Do they feel welcome? and 2) Do they feel they fit in here? Davison spoke to some of the research efforts planned in the coming year after the new Agency-of-Record is onboarded. Bronson noted some of the parallels between the E&I Statement and Grover Beach's Declaration of Human Rights, and noted that he would like to take the E&I Statement back to the Grover Beach City Council and advance a similar effort in Grover Beach. Newsom said that she would love to see an E&I presentation to the Atascadero City Council and better understand what their visitors are looking for (in this space). Lewis highlighted some of the E&I efforts in Pismo Beach (changing their assets, etc. to be more welcoming), and noted that Visit SLO CAL could assist in educating the local community in Equity and Inclusion. Howell, as a member of the LGBTQ+ community, noted that it's important to find ways to communicate authentically with diverse demographic groups. Davison recognized the importance of leaning into people from diverse communities who can help us communicate properly, and noted that this goes back to Visit SLO CAL's SD 2023 value of "Authenticity." George noted that one important strategy to increase diversity is to attract authentic diverse businesses, like authentic ethnic restaurants and that the communities should educate the local population as well. Davison tied this effort back to the product development noted in Experience SLO CAL 2050.

6. Experience SLO CAL 2050 Conversations

Davison noted that after Visit SLO CAL's Board of Directors approved Experience SLO CAL 2050 (SLO CAL's Destination Management Strategy), they prioritized and budgeted recommendations for FY 2020-21. Davison outlined the items in Visit SLO CAL's existing scope, items Visit SLO CAL will advocate for and/or partner on, and the items Visit SLO CAL will fund. Davison clarified that these recommendations are set to be started in FY2020-21, but that this doesn't mean they will be completed this year. Davison provided an overview of the Comprehensive Business Support Network, a program that will seek to jumpstart the Customer Service Training Program recommendation, but he noted that because this program does not deliver on the need for mass industry customer service training, additional programming will still need to be developed to solve for completion of the recommendation. He recognized Visit SLO CAL Board Member Mark Eads for his efforts in this space. He also noted that on the Events & Festivals Strategy, the strategy would be for each of the communities, and thus would need buy-in and support from each of the Destination Partners. Once a consultant is selected, Visit SLO CAL would ask each of the Destination Partners to be part of the program of work and to sign a letter of intent committing to actively engaging on the development of the strategy and adopting its components upon completion. He added that one of the

concerns that the Board has is that this is a significant investment and they want to make sure the strategy has full buy-in from, and adoption by, all of the communities. Visit SLO CAL asked the following questions from the committee:

What overall feedback do you have on the direction of the Experience SLO CAL 2050 work?

When we talk about key recommendations like the Events & Festivals strategy, does your community see this work as important and is it willing to invest in and adopt the strategy?

Public Comment. Jocelyn Brennan noted she believed the work is very important, and that it would be great to have some kind of master calendar. Davison agreed, and noted that the end goal would be to have an API based master calendar, available to all, which would create consistency and efficiency for visitors and residents.

Committee Discussion. Lewis noted that Pismo Beach has developed its own Events & Festivals Strategy, and that this is a good space for Visit SLO CAL to be leading. He noted that the strategy would need to be complementary to Pismo Beach's strategy because their strategy is working for them. Davison noted that Visit SLO CAL's goal would be to press into the work that has been done already in each community and focus its efforts on driving events to non-peak times to yield revenue for lodging investors, while making sure that residents are not frustrated by events and activities impacting the quality of life in their communities. Frutche noted that the Events & Festivals Strategy is one of the trickier recommendations, and that communities will need to recognize their own advantages, buy in to the strategy and step up. Davison asked for feedback on how to build buy-in from each community. Johnson noted that San Luis Obispo is committed to working with Visit SLO CAL and connecting with event production groups. He also noted that San Luis Obispo has historically invested in events, but doesn't traditionally own them. As such, the City of San Luis Obispo hasn't dictated the dates. Davison noted that the strategy will require communities that provide funding to push back on event dates, similar to how Visit SLO CAL has pushed back on the date proposed for the upcoming SPARTAN Race, into a non-peak period. He noted that defining "pocket" periods of availability for events is going to also be important. Davison emphasized the importance of leveling the playing field and working with communities at a moment when its known they will be challenged for business.

7. TOT Reporting

Pringle noted that Visit SLO CAL currently receives aggregated TOT reports from each city and the County, and that the Visit SLO CAL Board of Directors has requested a more granular breakdown in TOT reporting that segments the TOT numbers out by lodging type. Visit SLO CAL is asking for the Committee's assistance in providing TOT reports that split the numbers out by lodging type, so that it can better target these specific sectors (hotels/motels, RV parks, and vacation rentals (including B&Bs) in each community when they need assistance. Visit SLO CAL would request the reports by the 15th of each month, in conjunction with the delivery of each community's basic TOT report. Visit SLO CAL is hoping to add this segmented breakdown in the Business Intelligence Report, and as such, excel format would be preferable, with numbers for past months updated every month (as applicable). Visit SLO CAL is requesting reports dating back to July 2017 if possible.

Public Comment – None.

Committee Discussion. LeGras noted that she was happy to hear this request for breaking out the data by lodging type because it's important to understand where properties are struggling in order to strategize and help. She added that B&Bs fall under different restrictions from vacation rentals and that it's really important to segment these out as a different lodging type. Davison noted that Pringle will follow up with each community on this request.

8. Travel Trade & Marketing Efforts

Boast outlined Visit SLO CAL's travel trade strategy for FY 2020/21. Verbeck outlined Visit SLO CAL's earned media (PR & Communications) and paid strategies, and noted some of the highlights thus far. She described the organization's "house of brands" approach and played the 90-second brand video, an example of this new approach, which is now on the website homepage at SLOCAL.com. She also described Visit SLO CAL's #SLOCALSafely efforts and thanked Travel Paso and SLO TBID for providing assets to supplement Visit SLO CAL's own assets of businesses showcasing safe business practices. Visit SLO CAL asked the following questions from the committee:

What feedback do you have on Visit SLO CAL's travel trade and marketing strategies for this fiscal year?

Public Comment – None.

Committee Discussion. Pearce commented that the brand video was beautiful and that it was great to see such diversity. Johnson commented that the video was well done. He said that he loves the “house of brands” concept and noted that the diverse representation is always important.

ADJOURNMENT

Meeting adjourned at 4:39 pm.



[MEETINGS](#) | [WEDDINGS](#) | [EVENTS](#) | [TOURS](#) | [OUR AREA](#) | [MEDIA](#)

AN UPDATE FROM VISIT SLO CAL ON POTENTIAL LOSS OF TOT FUNDS

Dear Board of Supervisors, Mayors, CAO and City Managers,

We wanted to bring to your attention the potential loss of significant TOT funds to each of your communities. Since we were first made aware of Camp Roberts' possible designation as a facility for migrant children, Visit SLO CAL has been elevating communications with county, state and federal elected officials, community leaders, federal agencies and our lodging investors. Due to our commitment to advocate for our community on behalf of our investors and the tourism industry, we felt it pertinent to relay the information we have collected and verified, as we are concerned the probable impact may have far-reaching effects.

Officials indicated to us that negotiations are underway between The U.S. Department of Defense (DOD), The Department of Health and Human Services (HHS) and San Luis Obispo County on implementation details, with an activation date slated for late June or early July. The use of Camp Roberts as a facility for migrant children would bring thousands of federal employees or contractors to San Luis Obispo County.

To date, we are aware of five RFPs totaling at peak 7,700 rooms per night for federal workers. San Luis Obispo County currently has 9,998 hotel rooms, meaning at peak federal workers could occupy up to 77% of the total hotel inventory in the county. Agencies secured rooms beginning May 10 and yesterday, May 19, workers began checking into local hotels. HHS notified us that their maximum room rate is \$120 per night. Agencies issuing the RFPs are working to contract hotel inventory for up to 12 months stretching from Lompoc to Paso Robles.

HHS has also confirmed that these federal workers are all exempt from paying TOT or assessment dollars through the duration of their stay. While we remain agnostic to the politics surrounding this issue, we acknowledge the humanity and the necessity for the

time. As you know, tourism dollars spent in your community provide direct funding for public services, education, infrastructure projects and parks and recreation. The potential loss could financially strain resources for these essential services, resulting in limitations, and ultimately impacting the residential quality of life.

In order to demonstrate the potential loss of revenue, the chart below outlines TOT collected in pre-pandemic FY 2019, the estimated percentage TOT contributes to each city's and the county's general fund, the annual occupancy by community and the number of rooms sold.

Jurisdiction	TOT for 2018-2019	Approximate TOT % of General Budget for 2018-2019	Annual Occupancy for 2018-2019	Number of rooms sold for 2018-2019
County of San Luis Obispo	\$11,312,674	12%	68.4*	Info not available
City of Paso Robles	\$6,145,040	13%	69.3	358,100
City of Atascadero	\$1,390,972	5%	65.2	120,000
City of Morro Bay	\$3,569,201	20%	65.4	208,300
City of San Luis Obispo	\$8,032,973	8%	70.7	551,100
City of Pismo Beach	\$10,383,092	44%	69.0	453,000
City of Arroyo Grande	\$1,017,557	5%	68.6**	Info not available
City of Grover Beach	\$434,119	4%	68.6**	Info not available

**number reflects all countywide data*

***number includes the entire 5-cities area*

As demonstrated in the data, TOT provides a significant and reliable revenue stream for all jurisdictions in San Luis Obispo County. A reduction in TOT over an extended period of time would disparately impact general budgets and the programs provided to ensure a high quality of life to all residents.

Additionally, we want to point out that our local tourism industry is on the road to recovery and the percentage of possible rooms taken by federal contracts will displace visitors. Federal workers will not frequent local restaurants, wineries, retail and other tourism-related businesses at the same rate or spend as visitors to the destination, making the road to recovery even more difficult. The April 2021 STR report [HERE](#) demonstrates the increase in overall demand and daily average rates, a trend expected to continue through the peak summer months. During this period, SLO CAL's average daily rate increased to \$183 per night, a vast difference from the \$120 government rate the federal workers will be paying.

In addition to occupying hotel inventory, this number of workers will also impact our roadways and other countywide infrastructure. We want to call your attention to this information and encourage more robust and holistic conversations with state and federal elected officials to ensure alternative federal worker housing is explored and federal funds are provided to help mitigate the negative impacts and the absence of TOT or assessment collections. We also believe this initiative requires a detailed community plan of action. In

At Visit SLO CAL, we continue our conversations with HHS, our federal and state elected officials, and the County to ensure we have the most accurate information. We have been working to educate our lodging investors and make them aware of the situation and the challenges we face. We will continue to advocate for the best interest of our SLO CAL communities and we are here to assist as you navigate this evolving situation.

We appreciate your time and attention to this matter. If you have any questions, please reach out to **Annie Frew, Director of Community Engagement and Advocacy at Annie@SLOCAL.com**.



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The mission of Visit SLO CAL is to inspire travel and foster our unique experiences to create life-long ambassadors and economic growth for SLO CAL.

P: 805.541.8000

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Summary

Boosts in domestic travel held strong for the month of April as travel sentiment and vaccinations continued to improve throughout the spring season. Daily visitor arrivals were 7% above the same month in 2019 resulting in 206K hotel room nights sold this month. Additional demand encouraged ADR in April to rise \$25 to \$183, notably 17% higher than this month two years ago, while revenue performed 19% above the same month 2019. California is now forecast to reach the 70% mark for population vaccinated by mid to late July 2021, moving one step lower to 14th among US states as a slight slowdown in pace led the 70% threshold to move out one month further. The leisure travel recovery is in full swing for domestic visitors, while business and group travel will be starting to see more notable increases in 2021Q3.

Key Highlights

Hotel Performance	Hotels in San Luis Obispo County continued to increase performance in March as travel conditions improved. Room demand measured 202.1K nights, 11.6% higher than March of 2019, with room revenue performing 25% above two years ago.
TOT Revenue	San Luis Obispo County lodging generated \$4.3M in transient occupancy tax in March, up from \$2.9M in February, and 43% above collections the same month in 2019.
Visitor Arrivals	Through the result of improving weather and travel conditions, visitor arrivals were 7% above the same month in 2019 resulting in 206K hotel room nights sold this month. The spring season is contributing greatly to the recovery as visitors have become increasingly comfortable traveling more frequently and vaccinations continue.
Previous Quarter	<p>In Q4 2020 (calendar year), San Luis Obispo County welcomed 1.5 million visitors – 0.4 million less than Q3 and below the 1.8 million visitors in 2019 Q4. Domestic travel dropped to 13.4% below 2019. Despite a 96% decrease YOY, international visitation in Q4 nearly doubled over the previous quarter (3,800 vs. 2,057 in Q3) and was the highest since Q1.</p> <p>The \$165.5M Visa Card spending from domestic visitors in 2020Q4 (calendar year) was flat YOY, with 59% of the spending going towards restaurants, retail, and lodging. Pismo Beach increased its share in visitors to San Luis Obispo County from 13.4% in 2019 to 15.4% in 2020. Morro Bay and Grover Beach also registered notable increases in visitor share relative to Q4 prior year.</p>

Performance by Community

Year 2021 Month April Location SLO County

Lodging Performance

SLO County, April 2021

	OCC	ADR	RevPAR	Supply	Rooms Sold	Room Revenue
SLO County	69.0%	\$183.03	\$126.28	299,400	206,571	\$37,808,746
% chg YOY	+265.9%	+95.4%	+614.9%	+5.8%	+287.2%	+656.5%
% chg vs. 2019	-6.9%	+16.5%	+8.4%	+9.8%	+2.2%	+19.0%

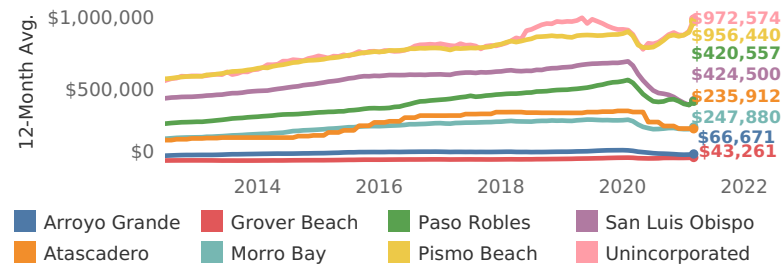
Five-Year Trend

April, SLO County

	OCC	ADR	RevPAR
2016	71.3%	\$144	\$103
2017	76.0%	\$150	\$114
2018	68.8%	\$150	\$103
2019	74.1%	\$157	\$117
2020	18.9%	\$94	\$18
2021	69.0%	\$183	\$126

Transient Occupancy Tax

12-month moving average, July 2011 to March 2021



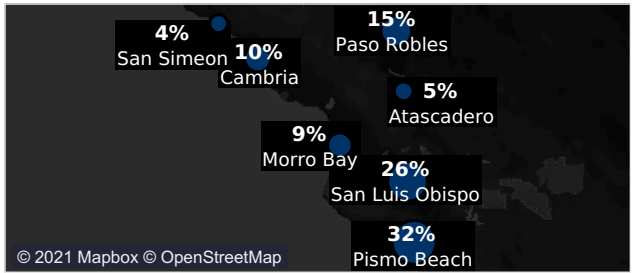
Performance by Community

April 2021

	OCC	ADR	RevPAR
Atascadero	63.6%	\$134	\$85
Cambria	71.2%	\$219	\$156
Five Cities	68.3%	\$225	\$154
Morro Bay	67.6%	\$164	\$111
North Coast	65.5%	\$186	\$122
North County	71.1%	\$149	\$106
Paso Robles	74.2%	\$153	\$114
Pismo Beach	69.9%	\$243	\$170
San Luis Obispo	70.5%	\$170	\$119
San Simeon	56.8%	\$137	\$78
SLO County	69.0%	\$183	\$126
South County	69.3%	\$199	\$138

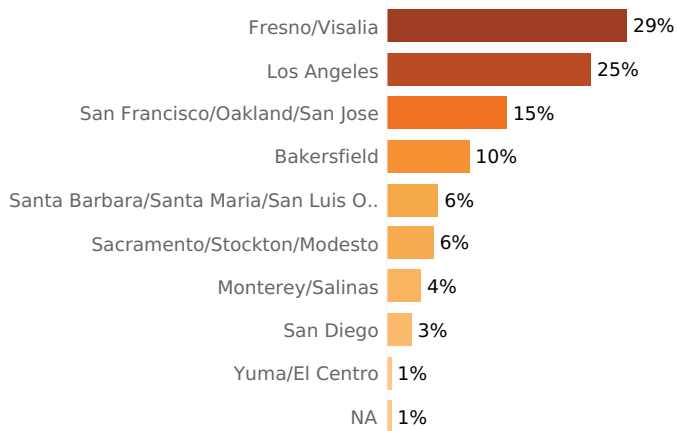
Hotel Room Revenue

% share of total revenue, April 2021



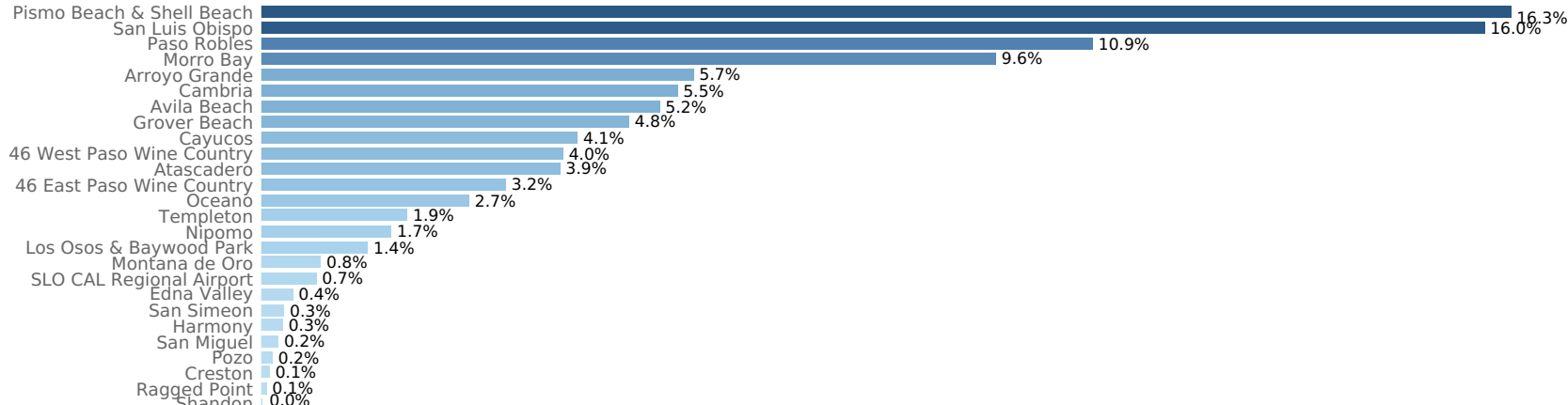
Top-10 Origin Markets

% share of tracked visits to San Luis Obispo County, April 2021



Primary Destination

(click on a destination to see cross visitation)
% share of visitor arrivals to San Luis Obispo County, April 2021



San Luis Obispo County | Calendar Year Performance

Year 2020 Quarter Q4

Hotel Performance

San Luis Obispo County,

OCC	Average Daily Rate	RevPAR	Supply	Rooms Sold	Room Revenue
49.5%	\$157.63	\$77.96	919,327	454,673	\$71,670,869

TOT Revenue

San Luis Obispo County

\$9,420,828

Total Visitation

% of total visits, Q4 2020

1.5M

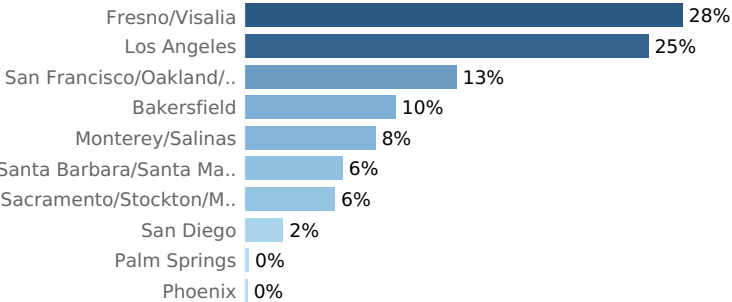
35%

65%

Day Overnight

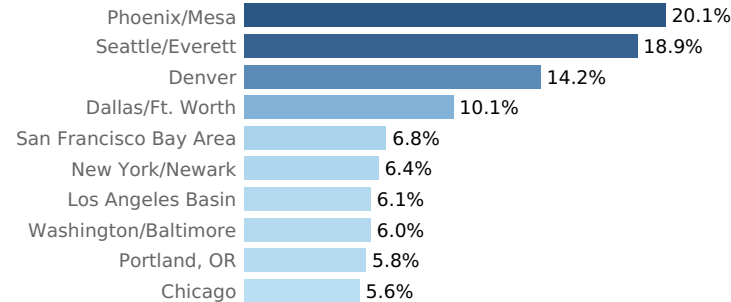
Top-10 Origin Markets

% share of tracked visits, Q4 2020



Top-10 Origin Markets by Air

by origin & destination passengers, 2020



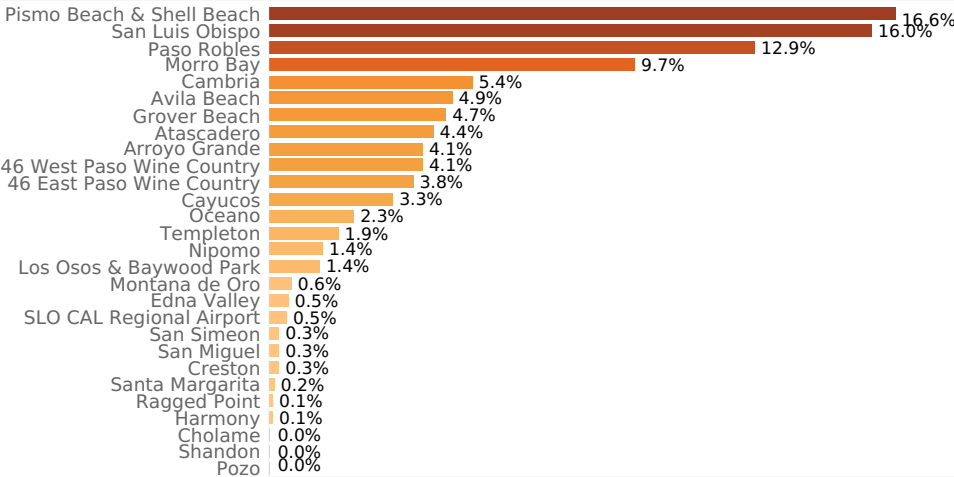
66,572

Enplanements & Deplanements
Q4 2020



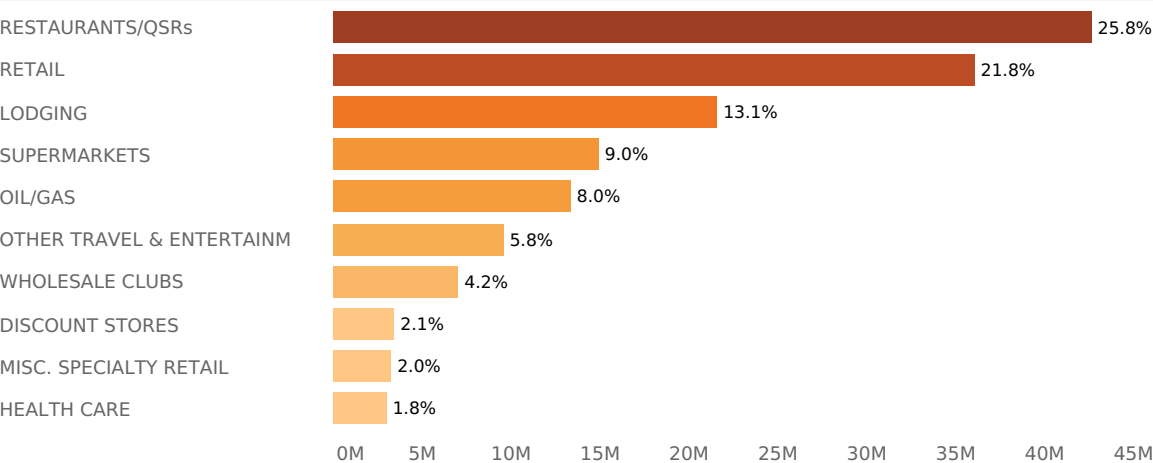
Visitor Arrivals by POI

% share of tracked arrivals, Q4 2020



Domestic Visitor Spending

Visa Card Spending, Q4 2020



Note: filters represents available data to date.

Source: Arrivalist, STR, VisaVue, Visit SLO CAL, Volaire, San Luis Obispo County Regional Airport, and Tourism Economics.

Covid-19 Recovery Tracker (1/3)



Hotel Performance

San Luis Obispo County and competitive set, April 2021

		OCC	MOM	% Chg vs. 2019	% Chg YTD vs. 2019	ADR	MOM	% Chg vs. 2019	% Chg YTD vs. 2019	RevPAR	MOM	% Chg vs. 2019	% Chg YTD vs. 2019	
SLO CAL	Community	Atascadero	63.6%	▲ 14.3%	▼ -10.0%	▼ -14.4%	\$134.16	▲ 15.9%	▲ 1.8%	▲ 0.0%	\$85.29	▲ 32.5%	▼ -8.5%	▼ -13.8%
		Cambria	71.2%	▲ 5.1%	▼ -8.3%	▼ -6.4%	\$218.61	▲ 16.5%	▲ 19.2%	▲ 12.5%	\$155.70	▲ 22.5%	▲ 9.3%	▲ 6.3%
		Morro Bay	67.6%	▲ 5.7%	▼ -8.3%	▼ -3.5%	\$164.04	▲ 19.7%	▲ 22.3%	▲ 15.2%	\$110.91	▲ 26.5%	▲ 12.1%	▲ 12.1%
		Paso Robles	74.2%	▲ 18.5%	▲ 2.0%	▼ -14.7%	\$153.40	▲ 15.6%	▲ 9.4%	▲ 1.6%	\$113.89	▲ 37.0%	▲ 11.6%	▼ -11.2%
		Pismo Beach	69.9%	▼ -2.9%	▲ -7.2%	▼ -0.5%	\$243.42	▲ 16.3%	▲ 33.8%	▲ 26.3%	\$170.18	▲ 12.9%	▲ 24.2%	▲ 26.4%
	San Luis Obispo	70.5%	▲ 5.6%	▼ -7.9%	▼ -14.2%	\$169.50	▲ 17.2%	▲ 4.1%	▲ 0.6%	\$119.42	▲ 23.7%	▼ -4.1%	▼ -12.7%	
	San Simeon	56.8%	▲ 5.3%	▼ -10.1%	▼ -5.8%	\$136.61	▲ 15.3%	▲ 6.8%	▲ 2.0%	\$77.65	▲ 21.5%	▼ -4.1%	▼ -3.4%	
	North Coast	65.5%	▲ 5.1%	▼ -8.0%	▼ -4.9%	\$186.17	▲ 16.5%	▲ 16.5%	▲ 9.9%	\$121.91	▲ 22.5%	▲ 7.2%	▲ 5.4%	
	North County	71.1%	▲ 17.2%	▼ -1.6%	▼ -14.7%	\$148.83	▲ 15.8%	▲ 7.8%	▲ 1.2%	\$105.82	▲ 35.7%	▲ 6.1%	▼ -11.9%	
	South County	69.3%	▲ 1.6%	▼ -8.5%	▼ -9.0%	\$199.08	▲ 16.0%	▲ 18.9%	▲ 14.2%	\$137.94	▲ 17.9%	▲ 8.8%	▲ 4.9%	
County	Five Cities	68.3%	▼ -1.5%	▼ -9.0%	▼ -4.2%	\$224.74	▲ 16.2%	▲ 31.1%	▲ 24.7%	\$153.57	▲ 14.5%	▲ 19.3%	▲ 20.3%	
	San Luis Obispo County	69.0%	▲ 5.6%	▼ -6.9%	▼ -8.8%	\$183.03	▲ 15.7%	▲ 16.5%	▲ 11.5%	\$126.28	▲ 22.2%	▲ 8.4%	▲ 2.8%	
Comp Set	Community	Monterey/Salinas	60.4%	▲ 14.5%	▼ -19.8%	▼ -28.4%	\$217.01	▲ 20.0%	▲ 5.3%	▼ -9.6%	\$131.16	▲ 37.5%	▼ -15.5%	▼ -32.8%
		Napa Valley	58.7%	▲ 17.7%	▼ -19.7%	▼ -34.3%	\$322.67	▲ 23.8%	▲ 5.1%	▼ -8.8%	\$189.33	▲ 45.7%	▼ -15.6%	▼ -36.4%
	Santa Barbara/Santa Maria	69.1%	▲ 17.9%	▼ -3.5%	▼ -18.0%	\$230.97	▲ 19.0%	▲ 14.2%	▲ 4.0%	\$159.65	▲ 40.3%	▲ 10.3%	▼ -12.0%	
	Santa Rosa	66.0%	▲ 16.5%	▼ -12.7%	▼ -23.1%	\$168.96	▲ 15.2%	▲ 2.4%	▼ -7.8%	\$111.56	▲ 34.2%	▼ -10.6%	▼ -27.7%	
	State	California	60.2%	▲ 7.6%	▼ -21.6%	▼ -30.2%	\$133.04	▲ 10.0%	▼ -21.6%	▼ -30.5%	\$80.07	▲ 18.3%	▼ -38.6%	▼ -50.8%

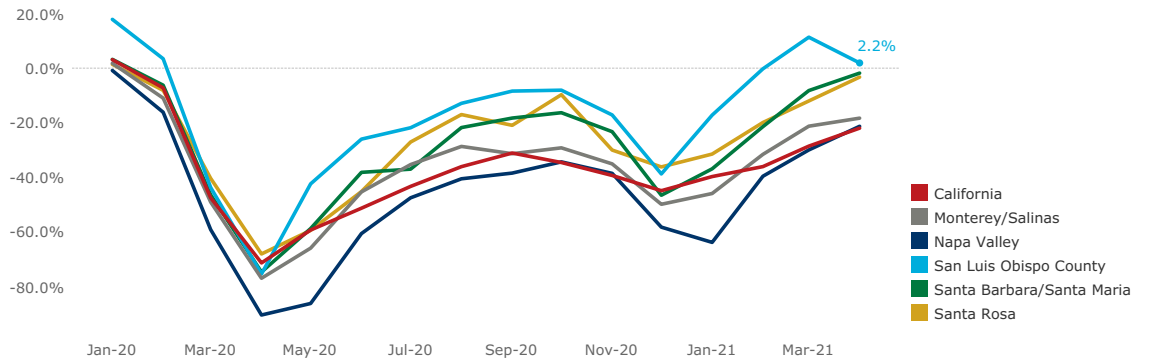
Room Demand

Daily room nights sold, San Luis Obispo County



Room Nights Sold

San Luis Obispo County and comp-set, % change compared to 2019



Source: STR

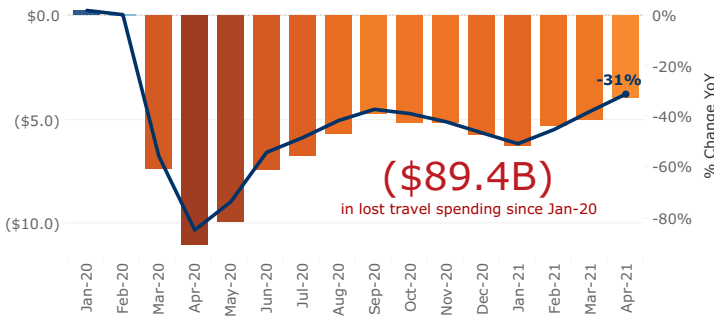
SYMPHONY TOURISM ECONOMICS

Covid-19 Recovery Tracker (2/3)



California Travel Spending

Loss by month (in billions) and % change compared to 2019



Source: Tourism Economics

Employment Trends

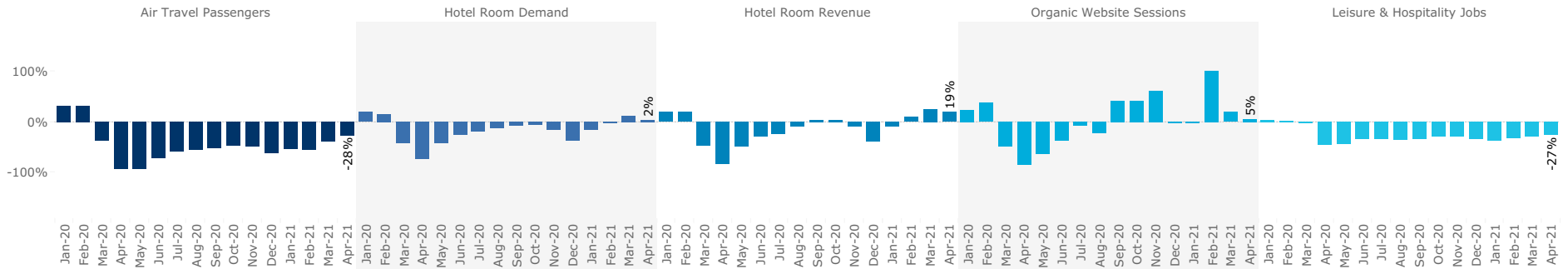
SLO County & Statewide (CA) job trends by month (in thousands), compared to 2019

	Leisure and Hospitality		Total Nonfarm		Leisure and Hospitality		Total Nonfarm	
	SLO County	Statewide (CA)	SLO County	Statewide (CA)	SLO County	Statewide (CA)	SLO County	Statewide (CA)
Jan-20	19.1	2,003.7	118.7	17,481.8	1.6%	2.0%	1.2%	2.0%
Feb-20	19.4	2,028.3	120.0	17,604.1	2.6%	1.9%	2.2%	2.0%
Mar-20	18.9	1,968.7	119.0	17,439.8	-1.0%	-2.1%	0.3%	0.8%
Apr-20	9.7	1,078.8	98.0	14,943.1	-50.8%	-46.9%	-18.6%	-13.8%
May-20	11.0	1,138.1	99.1	15,145.0	-45.3%	-44.5%	-18.5%	-13.0%
Jun-20	14.2	1,343.4	105.6	15,644.7	-31.1%	-35.0%	-13.3%	-10.3%
Jul-20	15.0	1,340.1	105.5	15,567.9	-26.8%	-35.3%	-10.7%	-10.1%
Aug-20	14.9	1,326.9	105.2	15,691.7	-27.7%	-35.8%	-11.4%	-9.9%
Sep-20	15.3	1,354.0	107.3	15,824.9	-23.9%	-33.8%	-9.4%	-9.2%
Oct-20	15.5	1,406.9	108.9	16,069.2	-22.9%	-31.3%	-9.2%	-8.8%
Nov-20	15.5	1,423.0	109.3	16,181.7	-22.5%	-30.4%	-10.5%	-8.9%
Dec-20	14.1	1,319.3	105.4	16,092.3	-28.1%	-35.4%	-11.7%	-9.3%
Jan-21	13.0	1,217.5	105.1	15,740.5	-30.9%	-38.0%	-10.4%	-8.2%
Feb-21	13.1	1,336.8	104.4	15,945.6	-30.7%	-32.8%	-11.1%	-7.6%
Mar-21	13.9	1,401.3	105.4	16,096.3	-27.2%	-30.3%	-11.2%	-7.0%
Apr-21	13.9	1,483.1	106.6	16,247.8	-29.4%	-27.0%	-11.5%	-6.3%

Source: Bureau of Labor Statistics (BLS)

Recovery Indicators

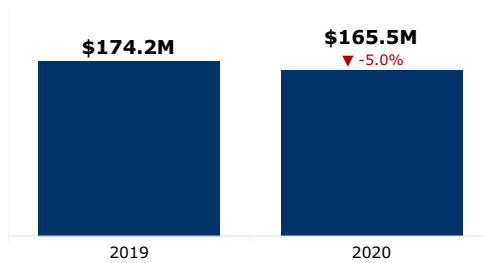
San Luis Obispo County, % change relative to the same month in 2019



Source: SLO CAL Regional Airport, STR, Google Analytics, and Bureau of Labor Statistics

Visa Card Spending by Visitors

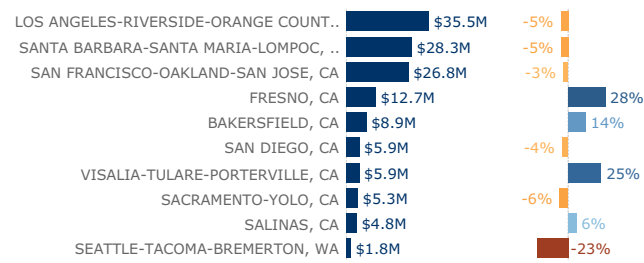
Spending in CY2020 Q4 and YOY % change, SLO County



Source: VisaVue

Visa Card Spending

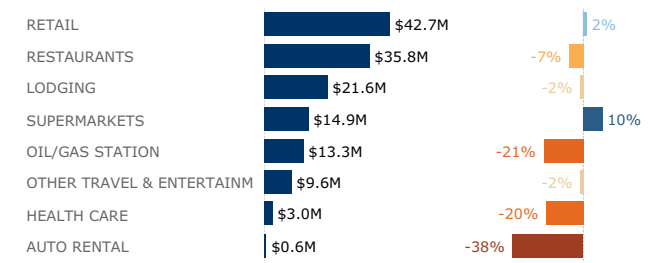
Spending by origin market in CY2020 Q4 and % change YOY, SLO County



Source: VisaVue

Visa Card Spending

Spending by sector in CY2020 Q4 and % change YOY, SLO County



Source: VisaVue

Grand Total

CY2020 visitation by Quarter, San Luis Obispo County

	Visitors 2020				YOY % Change 2020			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Total	1.4M	0.8M	1.9M	1.5M	▼ -11.5%	▼ -57.6%	▼ -12.8%	▼ -17.4%
Day	0.50M	0.32M	0.66M	0.52M	▼ -10.8%	▼ -56.1%	▼ -17.2%	▼ -20.6%
Overnight	0.90M	0.53M	1.26M	0.97M	▼ -11.9%	▼ -58.4%	▼ -10.3%	▼ -15.5%
Domestic	1.34M	0.84M	1.93M	1.49M	▼ -11.2%	▼ -56.0%	▼ -10.1%	▼ -13.4%
International	0.05M	0.00M	0.00M	0.00M	▼ -18.6%	▼ -96.8%	▼ -97.0%	▼ -95.6%

Source: Tourism Economics

VISIT SLO CAL EQUITY, DIVERSITY & INCLUSION STATEMENT

Visit SLO CAL is committed to ensuring that our work helps San Luis Obispo County (SLO CAL) become a more equitable and inclusive destination, so that all who travel into and through the destination feel welcomed and embraced by The California Less Traveled.

Our work is built on our commitment to ensuring a positive resident quality of life and to enhance our visitor's experiences. That means being willing to learn and participating in hard conversations around equity and inclusion as well as leading the Travel & Tourism industry to be better for ALL people.

We value ALL of our investors, partners, stakeholders and staff and we desire to create an inclusive and equitable environment built on a foundation of trust and collaboration.

We are committed to the following shared values:

- Understanding what equity is and acknowledging that not all people have the same starting point
- Being life-long learners regarding equity and inclusion and committing to the necessary repair work when we misstep
- Building and maintaining an inclusive community where all people feel welcomed and comfortable
- Stepping up and speaking out when we see injustices happening in our communities
- Working to ensure our intent aligns with our impact

We are committed to the following actions:

- Maintaining diverse representation on our board and committees
- Providing voluntary education to our investors, partners and stakeholders and mandatory training for our board, committees and staff on how to build equitable and inclusive businesses and communities
- Observing commemorative months through the promotion of Travel & Tourism businesses owned by members of the associated communities
- Being inclusive in our hosting of media and tour operators on individual and FAM trips
- Promoting to our industry the use of storefront displays telling consumers they welcome ALL people
- Ensuring we use assets in our marketing campaigns and owned channels that are representative of all people
- Building better and deeper relationships with our staff and agency partners to ensure we continue inclusive hiring and contracting practices

VISIT SLO CAL EQUITY, DIVERSITY & INCLUSION STATEMENT

Visit SLO CAL strives to constantly build a deeper understanding of what it means to be an equitable and inclusive organization and how to help our industry and community do the same.

We aim to remove barriers that hinder our residents and visitors from making SLO CAL their community or travel destination of choice. Addressing equity and inclusion through exploration and collaboration helps us to build a stronger more unified community—a community where we see race, age, ethnicity, sexual orientation, gender, gender identity, gender expression, religion, visible and invisible disabilities, socio-economic status, and all the intersecting identities therein, and we know that in these differences lies our strength.

We are committed to a regular review of our practices and to maintaining data driven systems that hold us accountable to ourselves and our investors, partners and stakeholders.

We encourage all of our investors, partners and stakeholders to commit to these shared values and to develop their own actionable steps to become more equitable and inclusive in their work.