



AGENDA

Visit SLO CAL Advisory Committee

Visit SLO CAL Advisory Committee Agenda

Thursday, June 13, 2019

3:00pm – 5:00pm

Embassy Suites

333 Madonna Road, San Luis Obispo, CA 93401

1. CALL TO ORDER

2. PUBLIC COMMENT (On Non-Agenda Items)

CONSENT AGENDA

C. Davison

3. Approval of December 6, 2018 Advisory Committee Meeting Minutes (yellow)

Staff will ask for Committee approval of the December 2018 Visit SLO CAL Advisory Committee Meeting Minutes.

BUSINESS ITEMS

C. Davison

4. District Highlights to Date (15 min)

Staff will provide top-level highlights of the TMD's past six months and progress as it relates to the goals of the District.

Follow up questions and discussion (10 min)

5. Tourism Insights (15 min)

Staff will provide key insights from the industry, including forecasts, visitor arrival data and trends, economic impact data and other metrics that communities can leverage in their efforts.

Follow up questions and discussion (15 min)

6. Tourism Marketing District Renewal (10 min)

Staff will walk the committee through the Visit SLO CAL Tourism Marketing District renewal process, including program and timeline.

Follow up questions and discussion (10 min)

7. Destination Management Strategy Recommendations (5 min)

Staff will request feedback from the committee members on ownership of the individual recommendations and what organizations should be solicited for involvement.

Follow up questions and discussion (30 min)

8. Open Questions and Discussion (10 min)

Staff will request feedback on the following from the committee:

1. *In your specific communities, what can Visit SLO CAL do for you?*

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, December 6, 2018

3:00pm

Embassy Suites

333 Madonna Road, San Luis Obispo, CA 93405

1. CALL TO ORDER: Clint Pearce

PRESENT: Matthew Bronson, Scott Collins, Red Davis, Tom Frutchey, Heidi Harmon, Erik Howell, Emily Jackson, Tom O'Malley, Rachelle Rickard, Mariam Shah

ABSENT: Jim Bergman, Lynn Compton, Barbara Harmon, Derek Johnson, Jim Lewis, Steve Martin

STAFF PRESENT: Chuck Davison, Brooke Burnham, Christine Robertson, Keba Baird, Brendan Pringle, Jordan Carson

BOARD MEMBERS PRESENT: Mark Eads, Aaron Graves, Clint Pearce

MARKETING COMMITTEE MEMBERS PRESENT: Terrie Banish, Jocelyn Brennan, Jennifer Little, Gordon Jackson, Danna Stroud

Call to Order at 3:04 pm.

2. PUBLIC COMMENT (On Non-Agenda Items)

None.

ANNOUNCEMENTS

None.

CONSENT AGENDA

3. Approval of June 7, 2018 Advisory Committee Meeting Minutes

Public Comment – None.

Committee Discussion.

ACTION: Moved by Rickard/Bronson to approve the Consent Agenda as presented.

Motion carried: 9:0:1
Frutchey abstained.

BUSINESS ITEMS

4. Funding and Allocation

Pringle provided a breakdown of the FY 2018/19 Budget, noting that 73 percent of funds are directed toward marketing, communications and travel trade. Annual fully-loaded staffing costs for all approved positions represents 25.1 percent of the budget. Pringle also provided an overview of staffing and open positions, and outlined FY2018/19 TMD funding received to-date (through September). He noted that Visit SLO CAL completed its third successful audit under the Management District Plan for FY2017/18, which found no material weakness or deficiencies in internal controls. The FY2018/19 Budget is currently being re-forecasted for Board review and approval on January 16, 2019 and will be based on the re-prioritization of annual projects and initiatives. During this process, additional dollars will be allocated to the spring advertising campaign. Pringle encouraged the communities to use ACH for payment, noting that this process is currently being used by the County of San Luis Obispo, City of Pismo Beach and the City of Grover Beach. He also reminded the Committee about the importance of on-time assessment remittance.

Public Comment – None.

Committee Discussion – Howell asked how late delinquent funds were arriving and if it was affecting cash flow. Davison responded that, in some cases, one community has been two months late, but that this was not having a major effect on cash flow.

5. District Highlights to Date

Davison outlined the goals of the Tourism Marketing District. He highlighted some of the growth metrics in air service development, and noted that load factors continue to remain strong with Seattle at 83 percent and Denver at 87 percent capacity. He also reminded the Committee that this air service comes with a significant marketing investment in each of those air markets.

Robertson mapped out the Economic Development Ecosystem (Visit – Live – Work – Business – Visit) and the composition of the Destination Management Strategy Steering Committee, and described the reason for Visit SLO CAL's investment in this project. She also described the progress to-date, and pointed out that all of the research, assessments and reports are available to the public at SLOCAL.com/DMS.

Burnham highlighted Visit SLO CAL's efforts surrounding the re-opening of Highway 1, including its partnership with Visit California on their Dream Drive event and familiarization tour with 58 journalists remaining in SLO CAL for two and a half days. The Committee viewed Visit California's recap video of the event. Burnham highlighted the results of the familiarization tour. Burnham also reviewed Visit SLO CAL's strategic marketing efforts. She offered a breakdown of the agencies with which Visit SLO CAL currently partners, and noted that Visit SLO CAL's Life's Too Beautiful to Rush campaign was a finalist for Best Digital Campaign at the the US Travel Association's ESTO Awards. Burnham also highlighted Visit SLO CAL's collaborative earned and paid media efforts with communities throughout the County, and some of the metrics in paid, owned and earned media for the fiscal year to date. Davison noted that the county lost approximately 54,000 room nights with the Highway 1 closure, but that occupancy in the county was still up, which shows our strong partnership with the communities and our ability to keep the business in the county and not lose market share.

Davison provided an update on Visit SLO CAL's travel trade efforts, noting its efforts in international markets like the UK, Germany and Mexico. He also provided key metrics on results since the last Committee meeting and highlighted Visit SLO CAL's presence at the Recreational Vehicle Industry Association California RV Show and the Vacation Rental Management Association Conference.

Public Comment – None.

Committee Discussion – None.

6. Moving Forward

Davison noted Visit SLO CAL's continued efforts in air service development, including meetings with United, American, Sky West, Spirit and Contour at the Take Off North America event in Memphis and an HQ meeting being planned with Alaska Airlines for Q1 2019. Davison also mentioned future growth markets and said he is excited to be announcing new air service to a major market in the following week. Davison discussed the next steps on the Destination Management Strategy, noting some of the adjustments to the timeline that were made in order to gain more feedback from city leaders on the invitation list for Visioning Workshops, and to properly vet draft recommendations with each community. The final report is due Q2 2019, and that Visit SLO CAL will partner and collaborate with local communities on implementation.

Davison provided an overview of upcoming travel trade efforts and reviewed the major strategic marketing initiatives Visit SLO CAL is planning for FY2018/19. He also provided an update on the Tourism Marketing District (TMD) renewal process, noting that the Board of Directors took formal action on November 15, 2018 to unanimously approve the first step of the process—approving a draft Management District Plan (MDP)—following an outreach campaign that included meetings with major investors across the county. He noted that those meetings included discussion of the additional scope of work being proposed by Visit SLO CAL's investors and partners and the discussion of increasing the assessment to 2%. Davison highlighted other key updates to the MDP that were made based on Board direction, and the next key steps in the TMD renewal process.

Public Comment.

Committee Discussion – Frutchev asked if the Visit SLO CAL Board has had any discussion on whether the Destination Management Strategy (DMS) is a one-time effort or represents an ongoing commitment from the Board. Davison noted that the DMS needs to be nimble enough to give the Board the opportunity to pivot, but that majority of the recommendations that come out of the DMS will not be owned by Visit SLO CAL. Davison also clarified that the DMS does not take away from Visit SLO CAL's marketing plans and that the organization is actually looking to increase its marketing efforts in the coming years. He said that Visit SLO CAL wants to be a champion of the DMS recommendations, and will work to leverage its partnerships with government officials at all levels. Pearce noted that the Board will learn a great deal after the plan is complete, and that if it makes sense to make updates after that, they will look to consultants to review. He said that the more frequently Visit SLO CAL can communicate with its partners, like TBIDs, the more successful it will be for all parties. Howell said he doesn't agree with the Economic Development Ecosystem and the DMS in general and that he doesn't know if he wants people to come live in Pismo Beach after they visit. Davison clarified the Economic Development Ecosystem model, and noted that there are some communities that want more development and that some communities are looking to welcome a better quality tourist. Robertson said that as people are thinking about the positioning of this region going forward, Visit SLO CAL's position is to continue to increase the quality of life, acting as stewards of the place, as communities are grappling with issues in their respective destinations. Davis asked how the DMS relates to the Hourglass Project. Davison answered that some of the DMS initiatives might be informed by or championed by the Hourglass Project, but that neither are far enough along at this point to know for certain. Harmon noted that a major problem in the tourism industry is low wages and low-wage jobs. Harmon asked if there has been discussion about this in the DMS. Davison noted that there had not been specific discussion but that there has been discussion on income inequality, and that a solution could include a combination of training and the right people in the right positions. He said that part of the challenge now is the limited workforce and that workforce immigration remains a hospitality issue. Harmon said that she didn't see the climate crisis conversation weaved into the DMS conversation, which concerned her. Davison noted that the results of the visitor and resident survey didn't show it as an area of concern. He noted that Visit California described its concern about it at the CalTravel Board Meeting, and that a lot of it is lack of education and the issue not being top of mind. Robertson noted that resource protection and stewardship is critical to the DMS, and that climate change is part of this. Howell suggested that the DMS might be "mission creep" on Visit SLO CAL's part. Davison explained that the DMS was outlined in the strategic plan that was approved by the Board in 2016. Pearce noted that the Steering Committee realizes that all

communities are different and that Visit SLO CAL is working toward a countywide strategy. He noted that we are trusting in the process, and that protecting the quality of life in our community is key. O'Malley said that he thinks Visit SLO CAL is on the right track. He added that we need more opportunities like this to discuss the broader issues and help parallel organizations. Shah noted that we need to think about the ramifications of expanding tourism and work to manage the destination. Bronson noted that the discussion today is reflective of some of the conversations happening monthly at the Steering Committee meetings. He commended Visit SLO CAL for helping facilitate more community-based feedback, and commended the Visit SLO CAL Board for having this vision and being inclusive in the process. O'Malley noted that one important item to look at coming out of the DMS will be how Visit SLO CAL's tourism assets are doing, and how we can facilitate activities to help fill rooms. Davison said this has been part of the discussion coming out the 14-market competitive analysis completed as part of the DMS. He said that some of these items Visit SLO CAL can own or help champion, but the majority will need to be owned by others. Pursuant to the conversation of raising the assessment to 2 percent, Shah said that the Affordable Housing Coalition was also suggesting raising TOT in the unincorporated area. Davison noted that if the TMD is successful, the initiatives it pursues will lead to economic impact, unlike TOT. Bronson noted that TOT measures across the state have had no trouble passing, and Davison noted that there is no public research that shows people make decisions on where to travel based on the tax rate in a destination. SLO CAL would still be below the 15.7% statewide average. Shah said she would like to see both the TMD assessment increase and the TOT increase for affordable housing in the unincorporated area move forward. Collins noted that everyone believes in what Visit SLO CAL has done for the county, but that in Morro Bay, TOT and assessment totals are already sitting higher than most of the county. He also said that Morro Bay needs to have its own ability to invest in its own assets for economic development. Davison noted that none of this is easy, but without additional funding, additional work will not get done and some current work will need to be reduced or eliminated. Howell questioned the DMS, and the commercials that ran on local television advertising the destination to local residents. Davison clarified that those commercials were actually PSAs that Visit SLO CAL didn't pay for encouraging local residents to take the survey for the DMS. Howell also questioned the increase to 2 percent and the 10-year renewal. Graves noted that to go through the renewal process again after five years is not an efficient use of CEO time or the organization's dollars. Frutche questioned if any community truly believes that they don't need Visit SLO CAL. Howell said that Visit SLO CAL shouldn't be trying to do an increase and 10-year renewal when, he believes, some of the lodging partners still need convincing. O'Malley asked how communities are able to "check in" during the 10-year term. Pearce responded that there are provisions for checks and balances, and that the MDP even would allow the lodging community to disband the TMD during a period of time each year if everyone felt the organization was not doing a good job. Davison explained how the '94 Act allows this to happen and is different than the '89 Act that most local TBIDs follow. Davison noted that Visit SLO CAL would be meeting with each local municipality in the coming weeks to seek additional feedback on the draft MDP.

7. Open Questions and Discussion

This item was removed from the agenda due to a lack of time.

ADJOURNMENT

Meeting adjourned at 5:03 pm.

MARCH 27, 2019

VISIT SLO eAL

DESTINATION
MANAGEMENT
STRATEGY

DRAFT
RECOMMENDATIONS



VISION

SLO CAL will become one of California's best-loved year-round destinations, a tightly interwoven and richly varied region that brings together the best of the California experience.

The region will bring together a series of experiences and itineraries that take families, sophisticated explorers and active adventurers off the beaten track and let them find new paths. In this all-season wanderland, they will discover the quintessential California state of mind: stroll and surf SLO CAL's long, laid-back coastal beaches, feeling their warmth and freedom; bike and hike its green hills and generous valleys, marveling at its vistas; immerse themselves in deeply historic towns; and savor the region's devotion to fresh ingredients, the exquisite craft of winemaking, the flavors and aromas of wellbeing.

These deeply appreciative and multi-faceted visitors will spend their SLO CAL time exploring many different kinds of experiences from coastal towns to vineyards, places familiar and unknown: Visit SLO CAL will make it easy for beach lovers to find their way to wineries, for hikers to take in small-town culture, and for conference-goers to explore an off-beat local venue and stay out late listening to live local music.

Families, foodies and adventurers will feel the sheer joy of outdoor life in a nourishing and inspiring landscape, and the transformative experience of a place where time doesn't move in a straight line—it curves at the pace of a trail ride, meanders through a leisurely tasting dinner, follows the roll and rhythm of surf and the sure blossoming of a vine in the SLO CAL terroir.

Development, like the visitor experience, will be conducted at a mindful pace that doesn't leave locals behind, and SLO CAL will be respected for its smart growth, sustainability and a California wellness that embraces lifestyle, community and environment. The SLO CAL destination, a collection of places, ideas, flavors and sensations, will become famous as a destination where, in true California style, visitors go their own way, wandering far and wide as if there's no yesterday and no tomorrow, enjoying a warm, sunny and welcoming present moment.

BACKGROUND

The Resonance approach to the creation of a Destination Management Strategy is based on rigorous destination research and designed to help residents and stakeholders articulate and share a clear vision for the future —because when people share a vision of the future, it gives them shared belief, shared purpose and shared passion.

It is for this reason that the first part of the Destination Management Strategy for SLO CAL focused on four research activities, which were reviewed and critiqued by a Steering Committee of 15 Community Leaders and Industry Stakeholders. The research led to important insights that were considered in the development of the future Vision for SLO CAL as a destination and the resulting Objectives, Strategies and Recommendations that were developed by this project. The research included:

STAKEHOLDER ENGAGEMENT - Identifying strategic issues and opportunities for SLO CAL as a destination for visitors and residents

DESTINATION SURVEY - Collecting and analyzing opinions and perceptions of previous visitors and residents about their experiences in SLO CAL

DESTINATION ASSESSMENT - Analyzing benchmark data associated with SLO CAL experiences vs 14 other destinations (actual and aspirational)

COMMUNITY SURVEY - Collecting and analyzing opinions and perceptions of residents about key issues and opportunities for SLO CAL as a place to live, work and play

The results and information from this research were then used in four visioning workshops, regionally disbursed, to gain broad input and envision / develop priorities on SLO CAL opportunities and challenges that might be addressed by the project.

The results of the four workshops have been compiled into this Destination Management Strategy (Draft Recommendations) Report.

OBJECTIVES

Destinations (cities, counties, states and countries) have undergone a period of extreme change over the past 10 years. Travelers' motivations have shifted, leaving many destinations that were well positioned just a decade ago struggling to balance the needs and interests of their industry with those of their local community. At the same time, this market dislocation is creating opportunities for forward looking travel and tourism destinations to create strategies and products that satisfy the needs and desires of both their residents and visitors.

In SLO CAL, the number of visitors coming to enjoy the multitude of outstanding outdoor activities, beaches, wine regions and urban experiences is increasing year after year – as is the resulting economic benefit.

At the same time, residents are protective of the high quality of life offered throughout the region. They cherish the scenic landscapes and coastal climate, the ease of accessing outdoor recreation and the laid back friendly people.

As a starting point for the Destination Management Strategy, Resonance asked industry, government and resident stakeholders to guide the process by prioritizing the Objectives that they felt were important for the project. The Objectives in order of priority were:

1. Resident Quality of Life

SLO CAL will support and invest in destination products and services, activities and events that preserve and create a high quality of life experience for residents that reflects the unique environment, culture and diversity of San Luis Obispo County.

2. Visitor Experience

SLO CAL will support and invest in destination products and services, activities and events that create a compelling, must-visit destination experience that reflects the unique environment, culture and diversity of San Luis Obispo County.

3. Investment

SLO CAL will foster the expansion of private sector investment in travel and tourism projects and services and the coordination of public infrastructure investment to achieve optimum benefits for the travel and tourism industry and residents.

4. Employment

The travel and tourism businesses in SLO CAL will become employers of choice for residents seeking long-term careers, offering exceptional opportunities for growth in the competitive tourism industry.

5. Environment

The travel and tourism industry in SLO CAL will embrace the vision of sustainable tourism and sustainable development, and work with Visit SLO CAL to develop and promote San Luis Obispo County as a world-leading sustainable community and tourism destination.

STRATEGIES

To provide structure and selection criteria to the long list of potential Recommendations identified by the research, stakeholder engagement and workshop process, the project team and stakeholders agreed to set forth four guiding Strategies that the Destination Management Strategy Recommendations should seek to fulfill. These four Strategies have been designed to address specific priorities for SLO CAL as a destination for visitors and residents.

1. Attract Visitors in Off-Season and Mid-Week

SLO CAL should prioritize recommendations on programs, events and efforts that balance SLO CAL visitors between Peak-Season and Off-Season, as well as Weekend and Mid-Week. This strategy is designed to smooth out seasonality issues and create a year-round sustainable tourism industry.

2. Attract Visitors to less Frequented Destinations

SLO CAL should prioritize recommendations on balancing and managing visitors numbers between high-traffic destinations such as San Luis Obispo, Morro Bay, Pismo Beach, Paso Robles and Avila Beach, and lower traffic destinations such as Arroyo Grande, Atascadero, Cayucos, San Simeon and the many other SLO CAL communities. This strategy is designed to reduce overtourism issues and grow tourism business in communities that could use increased development or business activity.

3. Increase Visitor Expenditure

SLO CAL should prioritize activities and experiences that will increase the average daily expenditure of visitors. This strategy is designed to reduce and manage visitor counts, while increasing visitor spending and economic impact.

4. Manage Peak-Season Visitors

SLO CAL should prioritize recommendations on visitor management and logistics activities and efforts that maintain a high quality of visitor experience and at the same time high quality of life for residents. This strategy is designed to manage peak-season visitor activities, while increasing resident quality of life.

RECOMMENDATIONS

To realize the vision for SLO CAL, the four regional workshops narrowed down dozens of opportunities and challenges to 28, then gathered those into eight areas of focus:

- Outdoor Activities that build on the strength of SLO CAL as a premier outdoor destination
- Food & Drink Experiences that celebrate the food, wines, beers, spirits and flavors of SLO CAL
- Events & Festivals that bring residents and visitors together to enjoy SLO CAL's cultural experiences
- SLO CAL Crafted products and experiences that celebrate the unique art and artisanal character of SLO CAL
- Workforce Development that addresses some tough issues and service delivery
- Industry Development that targets improving SLO CAL's destination hardware and operations
- Placemaking that looks at SLO CAL communities and their individual potential as unique and authentic places
- Sustainability that acknowledges SLO CAL's role as stewards of the environment

1. Outdoor Activities

- a. Experience Incubator
- b. Countywide trail system
- c. Bike Tourism

2. Food & Drink Experiences

- a. SAVOR SLO CAL
- b. Culinary Arts Campus

3. Events & Festivals

- a. Events & Festivals Strategy
- b. Signature Event(s)
- c. Space Launch Events

4. SLO CAL Crafted

- a. SLO CAL Crafted Brand
- b. Nightlife, Music and Entertainment
- c. Paso Robles and SLO Wines
- d. Cannabis Tourism

5. Workforce Development

- a. Talent Attraction, Development & Careers
- b. Workforce Transportation
- c. Workforce Housing
- d. Customer Service

6. Industry Development

- a. San Luis Obispo County Conference Center
- b. Chief Investment Officer (Travel & Tourism)
- c. Airlift Development
- d. Ground Transportation
- e. International Visitors
- f. Visit SLO CAL and Funding

7. Placemaking

- a. Morro Bay Waterfront
- b. Develop & Grow Communities
- c. Authentic Communities
- d. Thematic Routes

8. Sustainability

- a. Tourism Management
- b. Sustainable Tourism

1. OUTDOOR ACTIVITIES

There are few places on the continent with the extravagantly beautiful, healthful and wellness-inspiring outdoor environment of SLO CAL. Building on current outdoor activities by linking and expanding trail systems enhances this unique strength of the region, allowing visitors—as well as locals and their families—to explore more deeply and enhance their wellbeing and quality of life as they go. Facilitating experience creation will only enrich the regional narrative, encouraging longer stays and greater spends.

EXPERIENCE INCUBATOR

Visit SLO CAL should launch and lead a countywide incubator and network for SLO CAL visitor experience startups, a new program designed to discover and foster startups working on innovative brands, products, services, events and activities to improve the SLO CAL experience. The incubator will bring together Visit SLO CAL, SLO CAL tourism industry expertise and Cal Poly's Department of Experience Industry Management, along with participating startups, to co-create unique and inventive new experiences for SLO CAL visitors.

COUNTYWIDE TRAIL SYSTEM

Visit SLO CAL should join efforts with San Luis Obispo County, the municipalities, City Rangers, SLO Hike, ECOSLO, SLO County Parks, SLOCOG, Hike SLO, SLOPOST, Bike SLO County, CCCMP, SLOBC, SLO Horse News, Ride Nipomo-Equestrian Trails Alliance, PG&E and many other interested organizations and groups in San Luis Obispo County to create, develop, feature, celebrate and promote a countywide trail system for residents and visitors who love to walk, hike, run, bike and ride horses.

BIKE TOURISM

Visit SLO CAL should join forces with SLOCOG, Bike SLO County, its local partners (Bike Happening, CCCMP, SLO Regional Bikeshare, Cal Poly Bicycle Coalition, SLO Bike Club, Cycle Central Coast and SLO Nexus), and its Connect SLO County efforts to advocate for and create a “bike-friendly future in SLO County.” Visit SLO CAL should work to create and promote a premier west-coast outdoors destination (trails, parks, venues, roadways and amenities) for all types of biking (road, racing, BMX, mountain and cyclocross) and all levels of riders (recreational, amateur and professional).

2. FOOD AND DRINK EXPERIENCES

A combination of increasing numbers of more experienced and worldly travelers, the desire for authentic local experience, and growing interest in health and the provenance of food, have contributed to the sharp rise of culinary tourism, making food a true reason to travel. Memorable dining experiences, hands-on cooking, and connoisseurship in wines and spirits, have fueled the growth of food-oriented attractions across the U.S. that provide opportunities for locals, and also attract visitors keen to learn culinary culture and touch the local experience. Showing leadership in the culinary space and telling that story enhances credibility and differentiates offerings in an increasingly crowded field.

SAVOR SLO CAL

Visit SLO CAL should re-imagine its SAVOR SLO CAL brand and event, working with SLO CAL stakeholders to establish and promote a weeks-long signature festival of SLO CAL wines, craft beverages and culinary arts. SAVOR SLO CAL would be designed around visitors as much as locals, and be held during harvest.

SLO CAL should consider successful examples of wine and culinary festivals such as the Dine Out Vancouver Festival, which has grown into Canada's largest food and drink festival. More than prix-fixe menus, SAVOR SLO CAL, like Dine Out Vancouver, could be about "community, collaboration, and sharing...a culinary story with the world." Culinary talent, culinary and cultural experiences from neighborhood food tours to lunch-hour food truck fests could inspire SAVOR events, along with local wine tastings and global guest-chef collaborative dinners. SAVOR SLO CAL could grow into a compelling annual reason to visit.

CULINARY ARTS CAMPUS

Visit SLO CAL should join forces with a premier culinary school such as the Culinary Institute of America (Hyde Park, NY), the Institute of Culinary Education (NY and LA), or the International Culinary Center (NY) plus Cuesta College Culinary Arts and Cal Poly Department of Experience Industry Management to create a Culinary Arts Campus in San Luis Obispo County. The SLO CAL Culinary Arts Campus should take clues from the Culinary Institute of America (CIA) Campus in Napa, CA by becoming a premier "destination for exploring, experiencing, and enjoying the world of food, wine, art, and community. Experience cooking and beverage classes taught by industry experts, curated tasting events and festivals, delicious dining selections, artisanal art collections, and private event space, all in one convenient location—the epicenter of food and wine."

3. EVENTS & FESTIVALS

Events and festivals provide potential visitors with an easy-to-understand framework within which to plan a stay; they offer a low-risk way for people to try the tourism “product.” By creating a calendar of events that can appeal to a range of both visitors and locals, SLO CAL increases opportunities to attract a broader range of newcomers to destinations they might not otherwise consider. Festivals and signature events will allow SLO CAL to build comprehensive experiences that showcase and enhance regional strengths, and allow you to tell a broader story about the richness, vitality and variety of SLO CAL.

EVENTS & FESTIVALS STRATEGY

Visit SLO CAL should develop and implement a comprehensive county-wide Events and Festivals Strategy, along with professional resources and a dedicated stakeholder group (Visit SLO CAL, County, Cities, and Communities), that brings together public sector officials, industry stakeholders, venue owners / operators / organizers and event producers.

The strategy’s purpose should be to agree on a destination-wide master calendar, program, sponsorship/funding, locations, seasonality, logistics and operating plan to deliver the full potential of events and festivals to SLO CAL.

The events and festivals strategy should establish and apply business plan criteria for Visit SLO CAL investment and activation, and define performance measures for continued resources and effort.

Visit SLO CAL should work with event producers and organizers to develop and enhance their marketing reach, operational and quality efforts to create, maintain and enhance events and festivals that are true to SLO CAL’s brand, authentic to SLO CAL as a destination, capitalize on SLO CAL’s strengths as a destination and is(are) reflective of SLO CAL’s values.

Visit SLO CAL should work with Events & Festivals producers to invest in, incubate and spin-off events and festivals that create and fulfill key return-on-investment criteria set forward in an Events & Festival Strategy.

Visit SLO CAL should work with the Events & Festivals group to identify and fill niches, need periods and gaps in the visitor calendar.

SIGNATURE EVENT(S)

Visit SLO CAL should work with existing events and festivals to help deliver high-quality experiences and explore the potential for developing a signature event(s) or festival(s) for the destination. General preference for a signature event(s) and festival(s) should be given to those that align with SLO CAL's Events & Festivals Strategy, with specific focus on its strengths in the areas of outdoor and coastal activities as well as food and wine (such as SLO Farmers' Market, Mid-State Fair or Paso Robles Wine Festival), and can represent the SLO CAL brand 365 days of the year.

SPACE LAUNCH EVENTS

Vandenberg Air Force Base, located in northern Santa Barbara County, only 30 miles from San Luis Obispo County, is home to the 30th Space Wing and Air Force Space Command, whose mission is placing satellites into polar orbit from the West Coast and providing launch pad facilities to businesses such as SpaceX. In 2018, nine space launches were made from Vandenberg while 10 were made in 2017. Although these launch events do not follow a regular schedule, they are certainly increasing and are building a unique group of visitors (space enthusiasts) who travel from near and far to enjoy the launches. Visit SLO CAL should continue to develop, market and promote this niche event business, which is unique to the region, state and country.

4. SLO CAL CRAFTED

The appeal of craft culture—products from art to music to wine created through skilled creative artisanship—continues to grow in appeal for a society ever more enmeshed in the virtual and intangible. Inevitably a reflection of local influences, these offerings allow visitors to more deeply feel and understand sense of place, making visits more memorable and returning more desirable. In the same way, a SLO CAL Crafted nightlife is an after-dark reflection of the breezy daytime culture that is a regional signature, providing locals with more entertainment choices, diversifying the tourism offering, and creating new economic contribution to the region.

SLO CAL CRAFTED BRAND

Visit SLO CAL through its SLO CAL Crafted sub-brand should continue to assist and invest in the development, showcasing and branding of SLO CAL's authentic and unique artisanal and maker movement community to visitors and residents.

SLO CAL should activate empty spaces, build capacity, assist in startup processes, facilitate a community incubator (also see Experience Incubator above) for new business, streamline the regulatory environment, and create a communications and brand platform that features SLO CAL's artists, craftspeople and artisan makers of all types.

NIGHTLIFE, MUSIC AND ENTERTAINMENT

SLO CAL should target the advancement of nightlife, music and entertainment to deliver evening activities that compare favorably to its strength in outdoor activities. Visit SLO CAL should work with the County and Cities agencies, restaurants, bars, clubs, music, arts and entertainment venue owners/operators and other interested stakeholders to create a Nightlife Strategy for San Luis Obispo County, individual cities and communities that delivers a balanced plan for enhancing nightlife experiences, while maintaining a high quality of life for residents.

PASO ROBLES AND SLO WINE

Visit SLO CAL should continue to work with Paso Robles Wine Country Alliance and the winemakers of Paso Robles to develop, feature and celebrate the wines, vineyards, people, events and experiences associated with Paso Robles wines worldwide.

Visit SLO CAL should work with San Luis Obispo Wine Country Association and the winemakers of Edna Valley and Arroyo Grande Valley to help them advance the reputation of SLO Wine and increase the global awareness of the SLO Coast wine region.

CANNABIS TOURISM

Recreational cannabis is now legal in Canada, ten US states, California included, plus the District of Columbia, with New Jersey and New York quickly closing in on legalization. As a result, Cannabis Tourism, as an activity, is expected to quickly evolve from visiting a place “just because cannabis is legal there” to visiting a place for “the unique cannabis products, activities and experiences it has to offer.”

In this regard, SLO CAL’s history and experience with creating agritourism is a perfect case study of how enterprising SLO CAL entrepreneurs have created and delivered innovative wine / winery / vineyard products, activities and experiences to residents and visitors for decades. As regulations evolve enabling communities and venues to allow the onsite public consumption of cannabis, Visit SLO CAL should work with these communities and new cannabis entrepreneurs and leaders to assist them in establishing SLO CAL as a destination for unique cannabis / processing / farm products, activities and experiences.

5. WORKFORCE DEVELOPMENT

It would be impossible to speak of sustainable tourism development without facing the issue of workforce development head on. As SLO CAL begins to grow the tourism offering, it has a real opportunity—and necessity—to show leadership in this area and address the socio-economic issues that will only grow if strategies are deferred. The workforce is a key part of the infrastructure of tourism—as essential as a new hotel, festival or conference center. Thinking through and implementing income, transportation and housing solutions will provide long term benefits with less turnover, more loyalty, and better service to SLO CAL visitors.

TALENT ATTRACTION, DEVELOPMENT AND CAREERS

The Workforce Development Board of San Luis Obispo County Local Plan 2017-2020 identified “Accommodation and Food Service” as the largest economic sector in San Luis Obispo County employing 16,754 workers and is expected to add 1,049 jobs over the next 10 years. The Plan also reports that these “Tier 3” occupations tend to represent lower-skilled service positions with lower wages, but “does offer many career pathways into management or middle skilled jobs.” Although this research is excellent, Visit SLO CAL and its industry partners should conduct, produce and publish sector specific employment research to provide greater detail and analysis of travel and tourism industry needs.

Visit SLO CAL should also join forces with the EVC Workforce Development Task Force and the Hourglass Project, in collaboration with Cuesta College, the SLO County Office of Education, SLO Partners, Cal Poly, and the Workforce Development Board of SLO County, to “align career pathways [for Travel & Tourism employees] and meet the needs of local [accommodation and food service] employers... by connecting the talent in our region to local businesses and career opportunities.”

WORKFORCE TRANSPORTATION

The San Luis Obispo Regional Transit Authority (RTA) Strategic Business Plan for 2018-2020 is focused (Goal 1) to “Increase ridership through improved system design by attracting discretionary customers and improving sub-regional transit alternatives.” To assist the RTA in this effort, SLOCOG, Visit SLO CAL and its industry partners should work together to identify, map and assess the County’s hospitality and travel and tourism workforce transportation needs (home to workplace schedules, routes and last-mile connections) and create strategies and plans to deliver “increased [hospitality and travel and tourism workforce] ridership through improved system design.”

WORKFORCE HOUSING

Throughout the Destination Management Strategy project, the need for greater workforce housing was top of mind for Travel & Tourism business owners and operators, industry stakeholders, government officials and the sector employees, which are expected to reach 18,000 workers in 10 years time. This existential threat to the industry was also confirmed by several pieces of stakeholder and survey research conducted for the project. Although the need for affordable housing is not unique to tourism industry workers, Visit SLO CAL and its partners should join with the broader Coalition of Housing Partners from San Luis Obispo County led by the SLO Chamber of Commerce to advocate for, explore and develop strategies, plans and programs for workforce housing.

CUSTOMER SERVICE

The research prepared for the Destination Management Strategy suggested that customer service in SLO CAL could benefit from increased attention and development in order to deliver the destination, product and services experience necessary for more affluent, millennial, international and overall visitors who are demanding a better quality of service. As a result, Visit SLO CAL should work with Cal Poly, Cuesta College, and other educational and training organizations, to examine, select and implement customer service training and a certified customer service program for SLO CAL's travel and tourism partners and businesses. Visit SLO CAL should also consider developing and implementing an industry business and employee recognition program to award and reward establishments and people who are providing and delivering excellent customer service in SLO CAL, and use this program to increase visibility and efforts in this area.

6. INDUSTRY DEVELOPMENT

The need to make SLO CAL a balanced and diversified year-round destination—and to enjoy the economic benefits of that—requires the energy and will to go after new audiences and visitors, like the MICE market. Yet this may be less a divergence than it seems: increasingly, business travelers are leisure travelers, with younger people markedly more attracted to ‘bleisure’ — business + leisure — opportunities. Pre- and post-conference, this active and affluent audience is keen to experience SLO CAL’s brand of outdoor activities and lifestyle.

SAN LUIS OBISPO COUNTY CONFERENCE CENTER

The need to attract high spending meetings and convention visitors to San Luis Obispo County remains at the top of the wish list for many SLO CAL hospitality establishments seeking to increase off-season and mid-week business. Visit SLO CAL should take a leadership role in advocating for and assisting one or more communities in developing new meeting / event space.

Although Visit SLO CAL completed a countywide feasibility study, and several proposals to build a conference center (Grover Beach, Paso Robles and San Luis Obispo) have been considered over the past couple of years, the industry, government leaders and potential developers have yet to agree on a definitive plan to move forward. As a result, Visit SLO CAL should create and host a SLO County Conference Center Development Committee to assess the options and make a definitive decision on the potential for a San Luis Obispo County Conference Center.

CHIEF INVESTMENT OFFICER (TRAVEL & TOURISM)

The research and visioning workshops associated with the Destination Management Strategy project have suggested that future visitor markets and services in SLO CAL will trend toward more affluent consumers seeking higher-end activities and experiences. To capitalize on and develop this potential, Visit SLO CAL should create a new staff position (Chief Investment Officer) dedicated to work with SLO County and city development officials to identify Travel & Tourism investment opportunities and engage in programs, activities and events to promote high-end, experiential and conference Travel & Tourism opportunities in San Luis Obispo County.

AIRLIFT DEVELOPMENT

The addition of three new markets (Seattle, Denver and Dallas) in the last two years—and potentially new service to Portland and San Diego—are a major step for San Luis Obispo County Regional Airport, allowing for an important increase in the level of connectivity for residents and visitors to/from SLO CAL. Even so, Visit SLO CAL and SLO County Regional Airport officials should continue to work together to develop and promote new aviation market opportunities such as Salt Lake City, Las Vegas, Houston, Minneapolis and Chicago with a goal in mind that every U.S. visitor or resident in or out of SLO CAL only needs to make a total of one connection (two flights).

GROUND TRANSPORTATION

San Luis Obispo County is dealing with a number of visitor ground transportation issues including, but not limited to:

- Peak summer season when SLO CAL's highways are crowded with beach going visitors or when convenient parking is difficult to find;
- Late night hours when it's difficult to find a taxi or ride sharing service for an airport pickup;
- During a rental car pick up or drop off at the airport when the rental car lot is bursting at the seams;
- When the nearest RTA bus stop is still some distance away from the visitor's final destination.

All of these examples suggest that Visit SLO CAL should join forces with SLOCGO and county, cities and communities transportation officials and leaders to create and host a SLO CAL Visitor Transportation Task Force to identify specific visitor-related intra-county transportation issues, analyze the situation, develop options and implement solutions to make the visitor transportation experience in SLO CAL sustainable, seamless and convenient.

INTERNATIONAL VISITORS

International Visitors are an important and growing market for SLO CAL, as they tend to stay longer, spend more and travel during different periods of the year, helping to reduce some of the seasonality issues associated with domestic visitors. With this said, Visit SLO CAL should examine the destination, product and services preferences, transportation and logistics requirements and patterns, and cultural and language requirements associated with international visitors, and develop and deliver destination strategies, programs and

plans necessary, such as China-ready plans, to host, accommodate and facilitate these visitor groups.

VISIT SLO CAL AND FUNDING

The Objectives, Strategies and Recommendations of the Destination Management Strategy will require Visit SLO CAL to make adjustments and additions to its organization, staffing, operations and programs, as well as adjust and potentially increase its level of funding necessary to deliver a broader range of destination management services. Visit SLO CAL should update its Strategic and Annual Plans to account for the recommendations of the Destination Management Strategy and both renew and increase the TMD from 1% to 1.5% to provide the revenue necessary to carry out its updated mission.

7. PLACEMAKING

Placemaking brings together partners from public, private, non-profit, and community sectors to strategically shape the physical and social character of a neighborhood, town, city or region around arts and cultural activities. At its best, creative placemaking animates public and private spaces, rejuvenates structures and streetscapes, improves local business viability and public safety, and brings diverse people together to celebrate, inspire, and be inspired. Applying the principles of placemaking at the Morro Bay Waterfront and the many “Develop and Grow” Communities is a future-facing strategy to enhance the experience and potential economic contribution of these beloved and future destinations.

MORRO BAY WATERFRONT

The numerous Morro Bay waterfront activities and experiences (boating, sailing, kayaking, surfing, SUP, fishing, aquarium, retail, food and beverage, entertainment, events and accommodations) and assets (village, beach, bay and harbor) create a unique destination for San Luis Obispo County residents and visitors that is nearly impossible to duplicate, and sets SLO CAL apart from many other California coastal destinations. Adding the potential future development of the Morro Bay Power Plant to the mix, as a tourism asset or experience, is an opportunity that must not be ignored or left to chance. Visit SLO CAL should join with Morro Bay and SLO County leaders (public and private) to create an acquisition strategy, redevelopment plan and program that seeks to turn the Morro Bay Power Plant and waterfront into a key tourism and quality of life asset for Morro Bay and SLO CAL.

DEVELOP AND GROW COMMUNITIES

A number of SLO CAL communities including, but not limited to, Arroyo Grande, Atascadero, Cayucos and San Simeon were identified as lower traffic destinations with excess capacity to Grow or Develop their travel and tourism business. SLO CAL should conduct a detailed physical audit, examination and review of these places, and determine what placemaking opportunities exist or should be explored to increase visitor attraction and experiences in these places.

AUTHENTICITY

Pismo Beach is a quintessential classic California beach community with an energetic vibe, where visitors surf the day away, lounge on the sand, stroll the boardwalk and enjoy world famous clam chowder. On the other hand Paso Robles is a place of gently rolling hills where cowboy meets world-class wine region, with a charming downtown square and picturesque vineyards. Pismo Beach, Paso Robles and each of SLO CAL's cities, communities and unincorporated areas have a unique character and nature all their own, which is an important quality of life aspect for residents and a major draw for visitors near and far. SLO CAL should identify, document, advocate for and maintain as best as possible the authenticity of these places, so SLO CAL residents and visitors can enjoy their quality of life and experiences now and into the future.

THEMATIC ROUTES

San Luis Obispo County measures approximately 3,600 square miles with more than 80 miles of coastline and beaches, 1,330 miles of scenic county roadways, three wine regions, eight golf courses, 3,500 acres of sand dunes, hundreds of farms, thousands of culinary choices, a burgeoning craft brewing, cider and distillery scene, legalized cannabis, more than 20 art galleries and arts venues, famed mineral waters, dozens of premier historic sites like Hearst Castle, tons of shopping for every taste, 315 days of sunshine for outdoor activities, miles upon miles of hiking, biking and walking trails, and world famous Highway 1 - the road trip of a lifetime. Thematic Routes such as the Farm Trail or Wine Trail help visitors understand how to consume a diverse region such as this based on their particular interest, while also helping to disperse visitors to less visited parts of the county. Visit SLO CAL should work with each of the industry sectors, activity stakeholders and communities to identify, create, package, market and promote a series of thematic routes that leverage key points or areas of interest, and connect them to lesser known or visited parts of the county.

8. SUSTAINABILITY

The delicate California environment in SLO CAL is a major attraction for current and future visitors. As SLO CAL seeks to protect its environment, and help visitors understand that their respect of the region is an integral part of that, SLO CAL has an opportunity to grow intelligently and help people discover destinations off the (very) beaten path that will help everyone have a more enjoyable experience. Experienced and affluent visitors will seek out less-trafficked places that offer unique and authentic experiential bragging rights. As SLO CAL makes these places visitor-ready, the economic benefits of tourism will be more evenly shared.

TOURISM MANAGEMENT

During peak season, on certain weekends/holidays and for special events, there are sometimes too many SLO CAL visitors in the same place, at the same time, competing for limited resources (parking spaces, beach space, highways, etc.), and at times negatively impacting the quality of life of SLO CAL residents. Visit SLO CAL, working with county and municipal officials and leaders, should conduct carrying capacity research to identify and document these “overtourism” times and places, and create destination- and time-specific strategies, plans and programs to redirect visitors using events and festivals, promotions and real-time visitor messaging to undertourism communities and reduce the negative overtourism impact on resident quality of life.

SUSTAINABLE TOURISM

SLO CAL, like many other popular and important destinations, is facing a number of natural and manmade issues that are impacting, and will continue to impact, the quality of SLO CAL as a visitor destination and a place for residents to live, work and play including: climate change, water shortages, energy, waste management, economic growth and social development. As a starting point for addressing these challenges, Visit SLO CAL should review and assess sustainable tourism programs that are currently in place in SLO CAL and used by industry stakeholders, owners and operators, and their impact on industry-wide objectives. Second, SLO CAL should review well known international, national and statewide resources such as the United Nations World Tourism Organization programs for Sustainable Tourism and their applicability to SLO CAL; consider other well known sustainable tourism organizations’ programs and certifications and their benefits to SLO CAL; and finally select or design and implement a sustainable tourism program that best suits the needs and requirements of tourism in San Luis Obispo County, its visitors and its residents.



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