

ANNUAL REPORT **FY 2023**

VISIT





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# Letter from the President & CEO

## Dear Visit SLO CAL Investors, Partners & Stakeholders,



FY 23 was another record-setting year for tourism in SLO CAL. In 2022 tourism's economic impact to our local economy topped \$2.15B, setting a new record. Visit SLO CAL continued to make significant strides in supporting one of the region's top economic drivers and is proud of the partnership with all of you.

Our fiscal year started with a Brand Awareness Study to assess recall of the SLO CAL brand in our key markets. We found nearly one in 10 travelers in key media markets recall seeing our ads, and 97 percent had a favorable impression. To continue our forward momentum, a \$3M advertising spend was placed to promote visitation to the region.

In the fall, SLO CAL hosted the Visit California Luxury Forum, bringing 40 luxury buyers to the region from across the world. The event included 40 suppliers from throughout California and brought SLO CAL to life through 33 unique experiences, allowing us to highlight the world-class tourism product in our region to key international luxury buyers.

In partnership with the San Luis Obispo County Regional Airport and the advancement of the joint air service strategy, American Airlines upgauged Dallas/Fort Worth service from the 78-seat regional jet to our first scheduled commercial airbus service on a 128-seat A319. In the spring, American Airlines also upgauged the Phoenix service to the A319. In June, we announced daily nonstop service from Las Vegas on Alaska Airlines beginning in December 2023.

Visit SLO CAL launched SLO CAL Welcome, a first-of-its-kind customer service training program developed specifically for SLO CAL's travel and tourism industry. Since the program launched in November 2022, over 700 customer-facing staff have become certified by completing the eight unique modules.

In the spring, the Visit SLO CAL Board of Directors approved the Events & Festivals Strategy. This countywide collaborative effort provides tools and resources to assist local communities in growing midweek and off-peak visitation while maintaining and improving resident quality of life.

Through our continued advocacy efforts, Visit SLO CAL cooperatively funded an independent study of the Oceano Dunes State Vehicular Recreation Area with funding support provided by surrounding municipalities and invited more than 40 stakeholders to participate. The study provides 20 future-use stewardship recommendations to plan the future development, management and promotion of Oceano Dunes and surrounding communities should off-road vehicle use be permanently reduced or completely phased out.

Visit SLO CAL commissioned a resident sentiment survey and found strong resident sentiment toward tourism, with nearly three-fourths of residents agreeing that tourism is an important part of SLO CAL's future and two-thirds stating that tourism makes their community a better place to live.

As FY 23 came to an end, we developed and finalized Strategic Direction 2026 after soliciting input from key investors, partners and stakeholders. This three-year strategy functions as Visit SLO CAL's north star and provides a roadmap for work being done throughout the organization to benefit the community.

We hope that you will take the time to review the delivered scope of work highlighted in this document. We thank you for your partnership in responsibly growing tourism throughout San Luis Obispo County.

Here's to another great year.

A handwritten signature in dark ink, reading "Chuck Davison".

**Chuck Davison, CDME**  
President & CEO, Visit SLO CAL

# Board, Committees & Team

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## Board of Directors

### AARON GRAVES

Chair | EverlyGrove Hotel Brokers  
Unincorporated Area  
Elected Designated At-Large Seat ( — June 2023)

### AMAR SOHI

Vice Chair | Holiday Inn Express Hotel & Suites  
Atascadero  
Appointed Atascadero Seat ( — June 2023)

### MARK EADS

Secretary | Embassy Suites | San Luis Obispo  
Elected Designated At-Large Seat ( — June 2025)

### CLINT PEARCE

Treasurer | Madonna Enterprises | Atascadero  
San Luis Obispo  
Elected Designated At-Large Seat ( — June 2025)

### HEMANT PATEL

Past Chair | 805 Hospitality | Morro Bay | Paso Robles  
San Luis Obispo | Unincorporated Area  
Appointed Morro Bay Seat ( — June 2023)

### JEDIDIAH BICKEL

SeaCrest OceanFront Hotel | Pismo Beach  
Appointed Pismo Beach Seat ( — June 2024)

### BRYAN BONELLI

Paso Robles Vacation Rentals | Paso Robles  
Elected Designated Vacation Rental Seat  
( — June 2025)

### JIM HAMILTON

County of San Luis Obispo  
Appointed County At-Large Seat ( — June 2023)

### TONI LEGRAS-PRICE

Beachside Rentals | Unincorporated Area  
Appointed Unincorporated Area Seat ( — June 2025)

### HAMISH MARSHALL

AuzCo Developments | San Luis Obispo  
Elected Designated At-Large Seat ( — June 2025)

### SAM MILLER\*

Holiday Inn Express | Grover Beach  
Appointed Grover Beach Seat ( — June 2024)

### AMIT PATEL

New Horizon Associates | Morro Bay | Pismo Beach  
San Luis Obispo  
Elected Designated At-Large Seat ( — June 2024)

### NIPOOL PATEL

Lamplighter Inn & Suites | San Luis Obispo  
Elected Designated At-Large Seat ( — June 2025)

### PRAGNA PATEL-MUELLER

Samata Management, Inc. | San Luis Obispo  
Appointed SLO TBID Seat ( — March 2023)

### VICTOR POPP

La Quinta Inn & Suites | Paso Robles  
Appointed Paso Robles Seat ( — June 2024)

### BRITTEN SHUFORD

PRG Hospitality Group, LLC | San Luis Obispo  
Cambria  
Elected Designated At-Large Seat ( — June 2025)

### OPEN SEAT | ARROYO GRANDE

Appointed Arroyo Grande Seat ( — June 2024)

### OPEN SEAT | BED & BREAKFAST SEAT

Elected Designated Bed & Breakfast Seat ( — June 2024)

### OPEN SEAT | RV PARK SEAT

Elected Designated RV Park Seat ( — June 2025)

\*Resigned May 2023



## Marketing Committee

### **ASHLEE AKERS**

Partner & VP of Client Services | Verdin  
( — June 2023)

### **JIM ALLEN**

Director of Marketing & Communications | Hearst  
Castle ( — June 2025)

### **AUDREY ARELLANO**

Brand Manager | Cambria Inns Collection  
( — June 2023)

### **TERRIE BANISH\***

Deputy City Manager | Outreach, Promotions, Events  
City of Atascadero

### **MOLLY CANO\***

Tourism Manager | City of San Luis Obispo

### **CHERYL CUMING\***

Chief Administrative Officer | Unincorporated CBID

### **GORDON JACKSON\***

Executive Director | Pismo Beach CVB

### **STACIE JACOB\***

Executive Director | Travel Paso

### **LORI KELLER**

President/Principal | Blu Hotel Management  
( — June 2024)

### **KATHY MCCORRY\***

CEO | South County Chambers of Commerce

### **KATHLEEN NAUGHTON**

Executive Director | SLO Coast Wine Collective  
( — June 2024)

### **JOEL PETERSON**

Executive Director | Paso Robles Wine Country Alliance  
( — June 2023)

### **LINDSEY ROBERTS**

Director of Marketing | Martin Resorts ( — June 2024)

### **LINDA PARKER SANPEI**

CEO & Founder | Parker Sanpei ( — June 2025)

### **LYNETTE SONNE**

Founder & Herd Boss | FARMstead ED/SLO Co Farm Trail  
( — June 2024)

### **JOHN SORGENFREI**

President & Owner | TJA Advertising ( — June 2025)

### **JILL TWEEDIE**

Founder & President | Breakaway Tours Wine & Events  
( — June 2025)

### **MICHAEL WAMBOLT\***

Executive Director | Visit Morro Bay

\*Destination Partner



# Board, Committees & Team Continued

## Advisory Committee

### **WADE HORTON\***

County Administrative Officer | County of San Luis Obispo

### **DAWN ORTIZ-LEGG**

Supervisor, District 3 | County of San Luis Obispo

### **WHITNEY MCDONALD**

City Manager | City of Arroyo Grande

### **LAN GEORGE**

Councilmember | City of Arroyo Grande

### **RACHELLE RICKARD**

City Manager | City of Atascadero

### **HEATHER NEWSOM**

Mayor Pro Tem | City of Atascadero

### **MATTHEW BRONSON**

City Manager | City of Grover Beach

### **DANIEL RUSHING**

Councilmember | City of Grover Beach

### **SCOTT COLLINS\*\***

City Manager | City of Morro Bay

### **JENNIFER FORD**

Councilmember | City of Morro Bay

### **TY LEWIS**

City Manager | City of Paso Robles

### **STEVE MARTIN\*\*\***

Mayor | City of Paso Robles

### **JIM LEWIS\***

City Manager | City of Pismo Beach

### **STACY INMAN**

Councilmember | City of Pismo Beach

### **DEREK JOHNSON**

City Manager | City of San Luis Obispo

### **ERICA A. STEWART**

Mayor | City of San Luis Obispo

\*Resigned May 2023

\*\*Resigned March 2023

\*\*\*In memoriam





## Team



**CHUCK DAVISON**  
President & CEO



**CATHY CARTIER**  
Chief Marketing Officer



**ANNIE BRAUNSCHWEIG**  
VP of Administration



**TRACY CAMPBELL**  
VP of Community Engagement & Advocacy



**JESSIE BORCHIN**  
Office Manager



**KRISTEN BUHRING**  
Sales Manager



**CYNTHIA GONZALEZ**  
Director of Sales



**MATT HALVORSON**  
Marketing Manager



**MAYLA LOHNES**  
PR & Communications Specialist



**TREVOR LYNCH**  
Director of Marketing



**ALYSSA MANNO**  
Partner Engagement Manager



**LAUREN MILLER**  
Graphic Designer



**MELISSA MURRAY**  
Project Manager, Destination Management



**THERESA NAGAI**  
Marketing Specialist



**ERIC PARKER**  
PR & Communications Manager



**RACHELLE RAMIREZ**  
Events Manager



**EMILY RUDGE**  
Executive Assistant to the President & CEO



**CAMILLE SILVERA**  
Content Marketing Specialist



**BROOKE WEISBECKER**  
Digital & Social Media Producer



# Strategic Direction 2023

In the spring of 2020, Visit SLO CAL partnered with Coraggio Group to develop Strategic Direction 2023 (SD 2023), the strategic plan and north star by which the organization operated over the past three fiscal years. SD 2023 was advised by 170 survey responses, a dozen investor interviews, five regional engagement sessions and four half-day work sessions that included additional opportunities for investor, partner and stakeholder feedback.

## Vision

A vibrant and prosperous SLO CAL, fueled by a collaborative and flourishing tourism industry

## Mission

Inspire travel and foster our unique experiences to create lifelong ambassadors and economic growth for SLO CAL

## Values

### STEWARDSHIP

We are mindful of our resources and seek to enhance the SLO CAL lifestyle

### AUTHENTICITY

We are attuned to our own well-being and strive to bring the SLO CAL brand to life

### INCLUSION

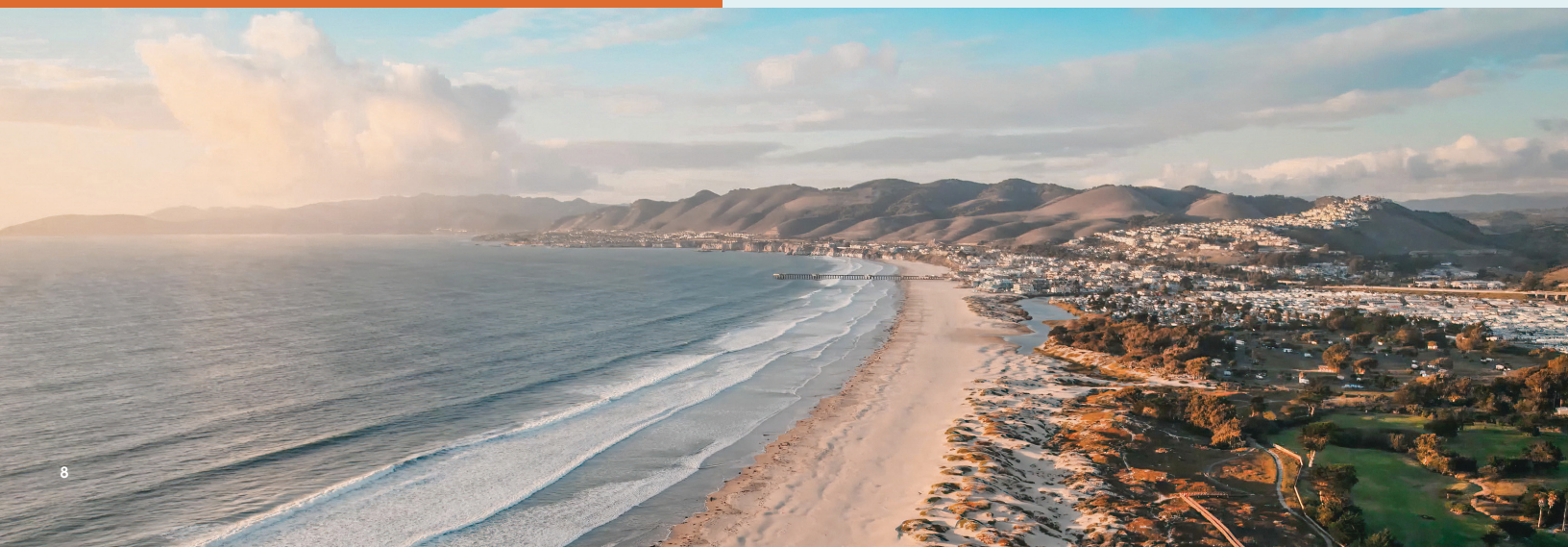
We engage and collaborate with an array of voices and perspectives

### DRIVE

We bring enthusiasm to our work and prioritize initiatives to achieve results

### FUTURE FOCUS

We deliver today with an innovative eye on tomorrow





## Reputation

- Visionary
- Strategic
- Collaborative
- Creative
- Responsive
- Essential

## Position

### To best support SLO CAL's tourism economy, Visit SLO CAL provides:

- Strategic research and vital tourism knowledge to investors, partners, stakeholders and communities
- A long-term, collaborative and holistic road map that enables success for our community
- High-quality and high-impact marketing and sales initiatives tailored to reach regional, national and international target markets
- Leadership in destination management and community engagement to enhance quality of life for residents and quality of experience for visitors

## Imperative 1 Objective:

### Continue to build an engaged, best-in-class team

#### KEY RESULTS:

- Refresh Net Promoter Score (NPS or equivalent) survey by July 31, 2022 and establish goals for FY 23 and beyond
- Develop a strategy by September 30, 2022 to make Visit SLO CAL a desirable, sought-after place to work committed to Diversity, Equity and Inclusion (DEI) principles
- Fill open positions approved in FY 23 budget by December 31, 2022

## Imperative 2 Objective:

### Advance the SLO CAL brand strategy to achieve increased visitation across the county

#### KEY RESULTS:

- Develop cross-visitation strategies to achieve score of 2+ communities by July 31, 2022 and execute by June 30, 2023
- Complete advertising awareness study by August 31, 2022 and adjust campaign metrics accordingly

- Develop integrated brand voice and storytelling between paid, owned and earned channel activity by December 31, 2022
- Deliver and execute House of Brands "always on" core strategies by June 30, 2023

## Imperative 3 Objective:

### Advance resiliency planning initiatives

#### KEY RESULTS:

- Create, rollout and achieve adoption of advocacy toolkit to advance the industry through formalized education on advocacy process and value by June 30, 2023
- Promote adoption of new Customer Service Learning Platform modules (beginning, intermediate, advanced and DEI) by 100 businesses and 350 individuals by June 30, 2023
- Identify new signature, SLO CAL-branded event opportunity by June 30, 2023
- Advance a plan for the development of a county-wide trail system by June 30, 2023
- Finalize and advance Air Service Recovery plan in partnership with SBP and Volaire Aviation by June 30, 2023
- Develop and launch Phase 2 Xplorit virtual site inspection program to advance activities featured by June 30, 2023

## Imperative 4 Objective:

### Increase engagement with investors, partners, stakeholders and communities

#### KEY RESULTS:

- Deliver Oceano Dunes Economic Impact & Mitigation Study by January 31, 2023
- Implement Resident Sentiment Survey to inform future marketing and advocacy objectives by February 28, 2023
- Onboard and engage 250 investors, partners, stakeholders and community members by June 30, 2023
- Increase Investor Net Promoter Score (NPS) to 50 as defined by biannual survey (2021 NPS = 47)

# Why Tourism Matters



## TRAVEL SPENDING

**\$2.15B** ↑ **13.8%**  
INCREASE YOY

\$5.9M  
a day

\$248K  
an hour

\$4.1K  
a minute

\$68  
a second



## INDUSTRY EARNINGS



**\$865M**

↑ **16.9%** INCREASE  
YOY

## TOURISM PUTS



**22,480** ↑ **15.6%**  
INCREASE YOY

RESIDENTS TO WORK EACH DAY

## DIRECT SPENDING BY SECTOR

LODGING



**\$765M**

FOOD SERVICE



**\$510M**

RETAIL



**\$267M**

RECREATION



**\$190M**



## TOURISM CONTRIBUTES



**\$62.7M** ↑ **6.3%**  
INCREASE YOY

IN TRANSIENT OCCUPANCY TAX REVENUE

WITHOUT VISITORS  
EACH SLO CAL HOUSEHOLD  
WOULD NEED TO SPEND  
AN ADDITIONAL **\$20,152**  
TO CREATE THE SAME ECONOMIC BENEFIT  
for the community

WITHOUT STATE & LOCAL TAX REVENUE  
GENERATED BY TRAVEL & TOURISM  
EACH SLO CAL HOUSEHOLD WOULD



PAY AN ADDITIONAL

**\$1,929** in taxes

**TRAVEL  
SPENDING  
CREATED  
\$116M  
IN LOCAL  
TAX REVENUE**

which could cover the expenses for



**1,136** POLICE OFFICERS'  
SALARIES

OR



**1,757** FIREFIGHTERS'  
SALARIES

OR



**1,487** TEACHERS'  
SALARIES

OR



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

**TOURISM COMPRISSES 9.78% OF COUNTYWIDE GDP**



# Tourism Data Insights

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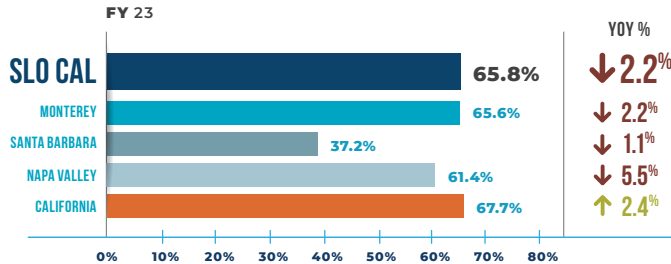
Visit SLO CAL continued to work with local municipalities and the county to secure data on transient occupancy tax (TOT) by community that segments the unique lodging mix (hotels and motels, short-term rentals, bed and breakfasts, and RV parks). VSC continued to provide a weekly and monthly Smith Travel Research (STR) report to its partners while working with Tourism Economics to produce monthly business intelligence reports that combined the data from the TOT, STR, Arrivalist, VisaVue, Community Benchmark and the San Luis Obispo County Regional Airport. These reports provided partners and stakeholders a complete understanding of how the tourism industry performed across the county.

FY 23 was a strong year for tourism in the county. Supply of hotel rooms increased year over year while demand was roughly stable. The effect of this is a slight decrease in occupancy percentage and RevPar. However, SLO CAL continues to prove a resilient destination as tourism continues to perform above pre-pandemic levels.

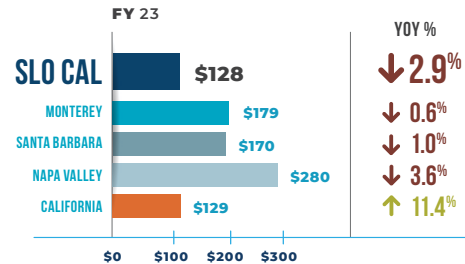


# Data Reporting

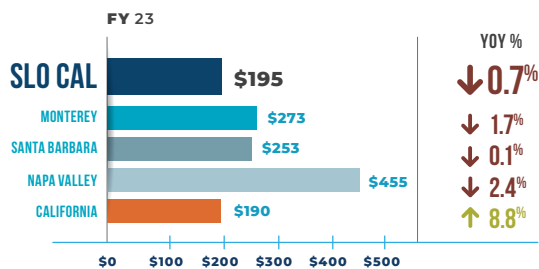
## HOTEL OCCUPANCY OCC



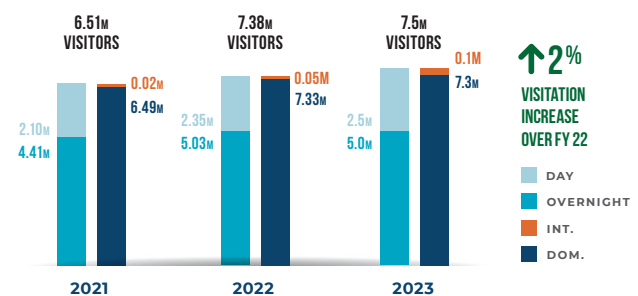
## REVENUE PER AVAILABLE ROOM **REVPAR**



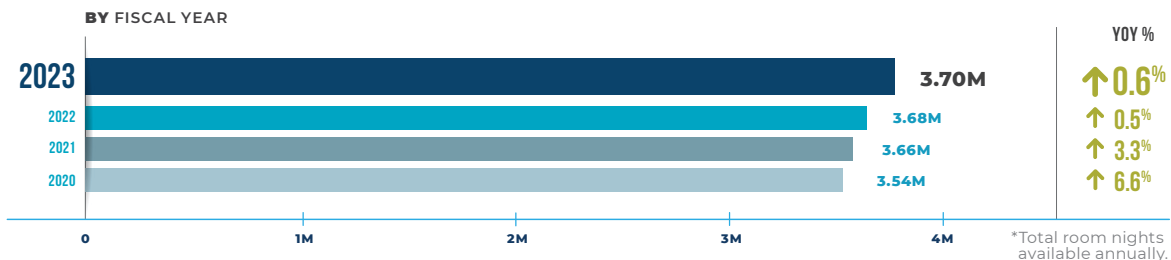
## AVERAGE DAILY RATE ADR



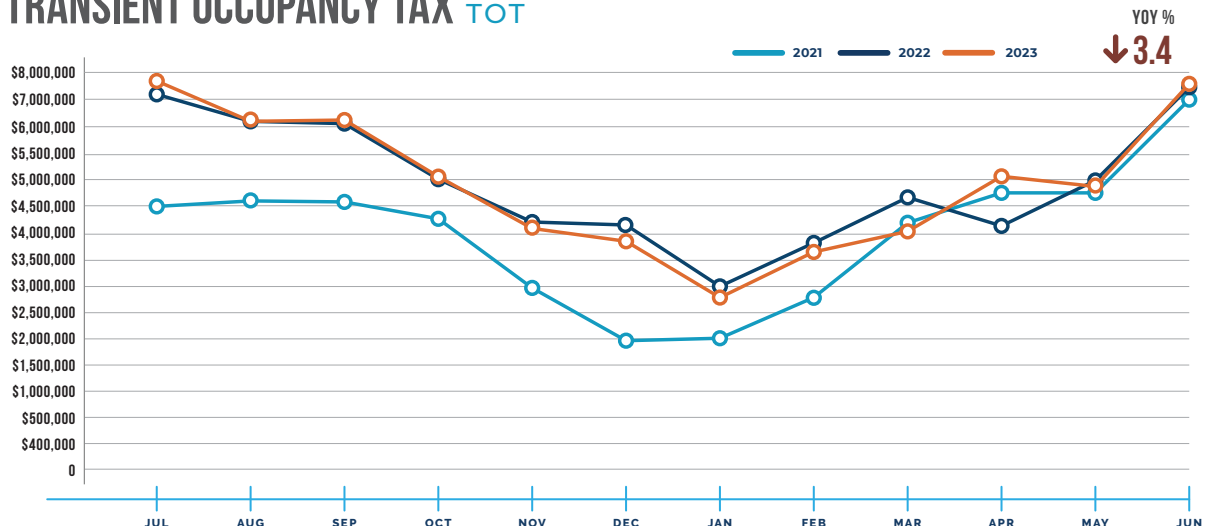
## VISITOR VOLUME



## SLO CAL SUPPLY\*



## TRANSIENT OCCUPANCY TAX TOT



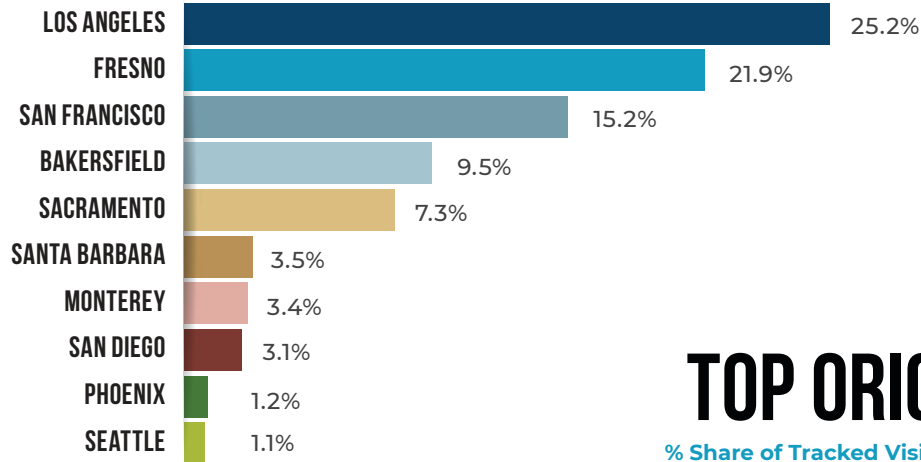
July 2022–June 2023 Source: Tourism Economics, Visit SLO CAL, STR, LLC. Republication or other reuse of this data without the express written permission of STR, LLC is strictly prohibited. Data as of September 2023.



## Arrivals & Visitation

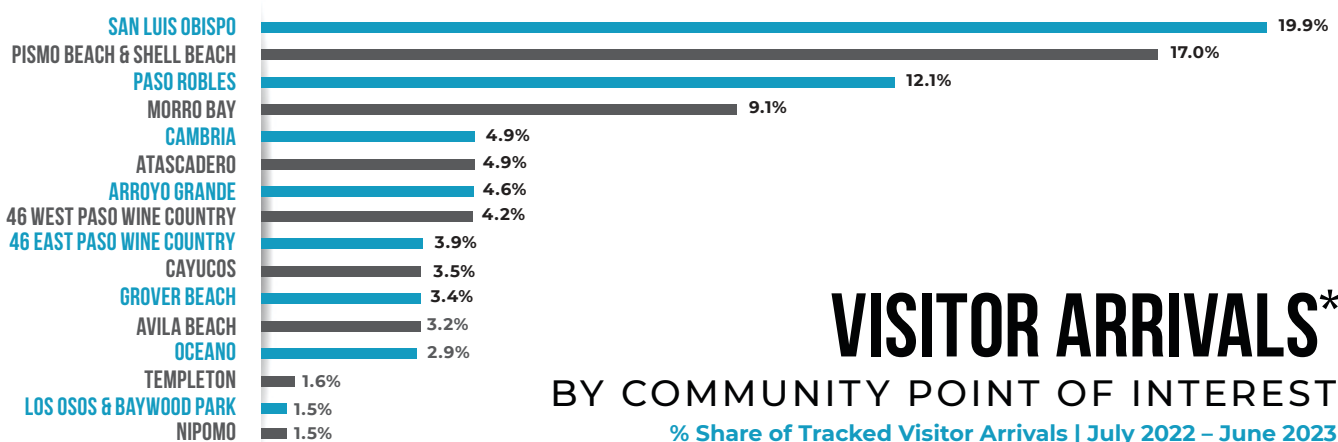
Partnering with Arrivalist and Tourism Economics, Visit SLO CAL offered insights to its partners and stakeholders on visitor arrivals to San Luis Obispo County. These insights highlighted key points of interest (POI), arrival windows, arrival origins, cross-visitation, length of stay and campaign lift as a result of paid media and organic traffic, which informs and reports on VSC's advertising efforts.

### ARRIVALS



## TOP ORIGIN MARKETS\*

% Share of Tracked Visitor Arrivals | July 2022 – June 2023



## VISITOR ARRIVALS\*

BY COMMUNITY POINT OF INTEREST

% Share of Tracked Visitor Arrivals | July 2022 – June 2023

### CROSS-VISITATION

**2.5** COMMUNITIES PER  
UNIQUE ARRIVAL

July 2022 – June 2023

### LENGTH OF STAY

**1.6** DAYS

July 2022 – June 2023

Source: Arrivalist, Tourism Economics

\*Visit SLO CAL's data provider (Arrivalist) had a change in methodology due to changes in privacy legislation in the spring of 2023. As a result, some YOY numbers are inaccurate comparisons. VSC has tried to omit any errant numbers to avoid misrepresentation.

# Sales

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Visit SLO CAL continued its sales strategy of targeting in-state, national and international trade, along with regional associations and corporate businesses in SLO CAL's drive markets. VSC remained focused on educating tour operators and travel advisors who sell domestic and international travel to California, while partnering with lodging investors to increase occupancy during off-peak season.

VSC continued to target international markets by attending several key trade shows as well as two Visit California CEO Missions to Japan and Europe. In March 2023, VSC began a new strategic partnership with PR and trade agency MMGY Hills Balfour to represent VSC in the UK and Ireland markets. In partnership with Visit California and Connections, VSC hosted the fourth annual Visit California Luxury Travel Forum, which showcased the county as the premier destination for "laidback luxury" travel. The three-day event brought together 40 top-tier luxury travel buyers from around the world to experience SLO CAL's finest travel products including hotels, venues and unique experiences found only in SLO CAL.

## EVENTS

# 2022

### OCTOBER

California Luxury Forum

### DECEMBER

CalSAE Seasonal Spectacular

# 2023

### FEBRUARY

GoWest Summit

### MARCH

Travel Paso Meeting Planner FAM

Japan CEO Mission

### APRIL

Visit California Roadshow  
Seattle & Denver

### MAY

IPW

### JUNE

London/Paris CEO Mission

**218**  
APPOINTMENTS

**3**  
TRADE SHOWS

**217**  
LEADS\*

**294**  
BUYERS TRAINED

\*Lead: A connection or opportunity provided to local investors and partners to book business, promote their company, or host travel buyers and meeting planners to experience their product.





# Earned Media

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VSC collaborated closely with Visit California, local destination partners, investors and stakeholders to engage with members of the press through in-market meetings, press events, media mailers and familiarization (FAM) tours. In addition to attending several media events, International Media Marketplace, Visit California's Destination Mixer and IPW, VSC participated in missions in Dallas, Texas; New York City, New York; and Sacramento, California. VSC worked with agencies MMGY NJF and Black Diamond to bring over 20 media FAM tours to market. VSC opened the RFP process in November 2022 for new international representation, securing representation with MMGY Hills Balfour for the remainder of FY 23 and into FY 24.

## DOMESTIC

**202 ARTICLES**

**\$25.6M AD VALUE EQUIVALENCY**

**2B IMPRESSIONS**



## LOCAL

**68 ARTICLES**

**\$137k AD VALUE EQUIVALENCY**

**13.8M IMPRESSIONS**



## INTERNATIONAL

**87 ARTICLES**

**\$1.6M AD VALUE EQUIVALENCY**

**340M IMPRESSIONS**



## TOTAL

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**357 ARTICLES**

**\$27M AD VALUE EQUIVALENCY**

**2.4B IMPRESSIONS**



# Owned Media

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In FY 23, Visit SLO CAL aimed to enhance its owned media presence. Across the website, newsletters, social media and VSC's yearly visitor magazine, this evolution has allowed VSC to elevate the portrayal of the destination. For every piece of content created, every aspect of the marketing ecosystem is utilized to gain maximum exposure and optimize the user journey through the marketing and sales funnel.

## Website

Building upon the successful launch of the revamped website in FY 21, VSC's focus shifted toward optimization, innovative initiatives and broadening the site's editorial strategy. Time on site and total bounce rate suffered with the shift, but solutions were identified to move forward and build a better user experience.

## Social

VSC continued to retain the services of the Pensara Group to aid in social media efforts. In FY 23, VSC employed a video-centric social media strategy crafted by Pensara Group for consumer platforms. This fusion of polished branded content and iPhone-captured Instagram reels yielded a consistent upswing in engagement and video views. Looking forward, Pensara Group has authored a B2B social media plan, centered on LinkedIn, extending VSC's existing strategy.

## Consumer Newsletter

The VSC consumer newsletter continued to be an important asset in driving traffic and interest to the region. Distributed monthly, its content centered around different things to do and see for a variety of traveler niches such as adventure, family and luxury travel. Major gains in total subscribers were made with a consistently high open rate.

## Visitor Magazine

VSC's yearly visitor magazine was distributed in and around the county at major travel hubs. The version released contained best-in-class content and design on all things of interest for potential travelers. The main strategic focus for this edition was on increasing distribution. Through a large outreach initiative with hotels and partners, there was a major YOY increase.



## Owned Media Continued

SOCIAL   

**3.3k** **↑6.2%**  
INCREASE YOY  
AUDIENCE GROWTH

**113,891**  
TOTAL ENGAGEMENTS

**5.2%** ENGAGEMENT  
RATE

*Facebook benchmark is .1%  
Instagram benchmark is 1.2%*

**2.2M** **TOTAL**  
IMPRESSIONS

**1,181,523**  
COMPLETED VIDEO VIEWS

## SLOCAL.COM\*

**1.96M** **↓0.6%**  
YOY  
SESSIONS

**522k** **↓14%**  
YOY  
ORGANIC SESSIONS

**165k** **↓5.2%**  
YOY  
PARTNER REFERRALS

**1.6k** **↓36%**  
DECREASE YOY  
E-NEWSLETTER SUBSCRIPTIONS

**36%** **↑31%**  
INCREASE YOY  
E-NEWSLETTER OPEN RATE

**33.5k** **↑720%**  
INCREASE YOY  
VISITOR MAGAZINE REQUESTS

*\*VSC's website provider experienced a change in reporting methodology in the months of September and October 2022, which caused inconsistencies against KPI's already established for paid media.*



# Paid Media

Visit SLO CAL continued to leverage its relationship with its Agency of Record, The Shipyard, to produce all creative assets and to negotiate media buys for the organization. VSC and The Shipyard developed The Land of... campaign 2.0 highlighting the various SLO CAL communities and experiences unique to each of them. This extension of the campaign featured nontraditional families in cross-county experiences supporting VSC's cross-visitation strategy. This campaign's advertising dollars were spent with Google, Facebook/Instagram, HULU, Magnite, Dotdash/Meredith, Pinterest, Undertone, Pandora, The Trade Desk, Viant, TripAdvisor and Sojern. VSC achieved roughly 246M impressions, which was 11% above the goal. VSC garnered approximately 46M video views, which was approximately 6M more than the goal. VSC had a click-through rate of .92%, which was 21% higher than its goal.

## FY 22 PAID MEDIA SNAPSHOT

 **\$3.3M**  
SPEND

 **1.4M**  
CLICKS

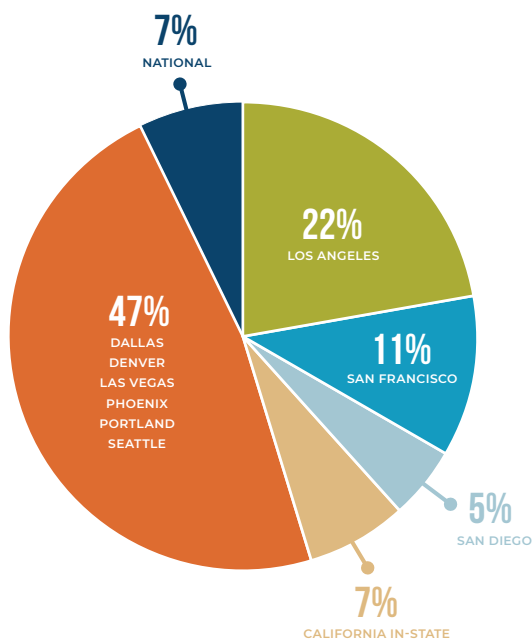
 **246M**  
IMPRESSIONS

**64%**  **14%** YOY  
VIDEO COMPLETION RATE

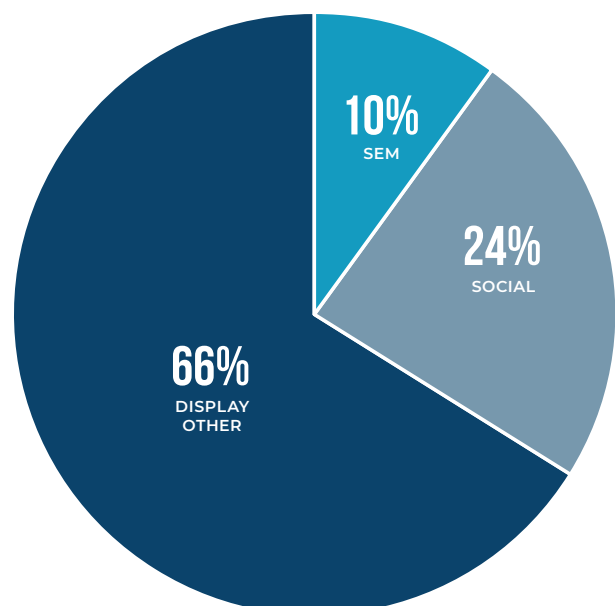
**.92%**  **23.9%** YOY  
CLICK-THROUGH RATE

**\$1.51**  **63%** YOY  
COST PER CLICK

### PAID MEDIA BY MARKET



### BREAKDOWN BY CHANNEL



*According to Arrivalist, paid media resulted in an 196% lift in arrivals and -18% lift in length of stay compared to the control group which was not exposed to paid media in FY 22.*

# Partnerships & Events

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Visit SLO CAL offered various engagement opportunities to investors and partners throughout the year, including tools and best practices to grow their business, exposure on SLOCAL.com and opportunities to reach new visitors. In FY 23, VSC continued to expand the reach of SLO CAL Crafted, a program that identifies and celebrates locally owned businesses. VSC also launched the SLO CAL Mural Trail and its year-round culinary strategy.

## SLO CAL Crafted

Since the launch of the SLO CAL Crafted program in November 2021, VSC has continued to expand the program's reach and brand recognition. By the end of FY 23, SLO CAL Crafted grew to 116 certified partners. Building upon the ongoing SLO CAL Crafted video series, VSC produced six new videos in FY 23 featuring business owners across the county, keying in on their unique crafts and the community that has embraced their business. Additionally, there have been multiple new engagement opportunities that were offered to SLO CAL Crafted partners, including the pop-up markets at the 2022 Visit California Luxury Travel Forum and Destination Summit.

## SLO CAL Open

In December 2023, VSC was the title sponsor of the SLO CAL Open in partnership with the World Surf League (WSL). The event featured two competitions, one in Pismo Beach and another in Morro Bay. VSC increased its investment with the WSL to make the event in Pismo Beach a 3000 series for the first time in SLO CAL history – attracting higher caliber surfers.

The events garnered over 312K total views across event pages, live, results and content on the WSL site, with 66.5K total engagements on social media channels including YouTube, Instagram, Facebook and Twitter. In total there were 2.5 million impressions via all WSL platforms, with VSC commercials running at the start of each break in coverage throughout the event.

## The SLO CAL Mural Trail

In March 2023, VSC officially launched the SLO CAL Mural Trail. The trail map covers over 30 large-scale murals painted throughout the county for visitors to experience as an initiative to promote cross-visitation. In addition to the SLO CAL Mural Trail Map, VSC Commissioned two murals by local muralists Canned Pineapple Co. to be located in San Luis Obispo and Cambria to add to the public art scene. The artistic inspiration for the murals commissioned by VSC represents the migration of the monarch butterflies through our coastal region connecting different parts of SLO CAL together and paying homage to the communities where they are located. In addition to the commissioned murals and trail map, SLOCAL.com has a dedicated landing page for the SLO CAL Mural Trail map and blog feature.

## World Travel & Tourism Council Content Series

The World Travel & Tourism Council partnered with VSC in a first-ever Destination Spotlight focused on sustainability. The video series focused on sustainability in the tourism space and was curated to give WTTC audiences a positive case study, providing viewers with an example to follow, learnings from individuals who have championed this approach and an inspiring look at the destination. The content was distributed through WTTC's social media channels with messaging that sits across a spectrum of audiences. VSC also distributed the content on the website and through social channels.



## Year-Long Culinary Strategy

In FY 23, VSC embraced a year-long culinary strategy to spotlight the region's diverse culinary experiences. The "Culinary Celebration" kicked off with a six-part video series in January, showcasing SLO CAL's culinary richness. Additional videos were shot throughout the fiscal year, which will continue to be released in support of the local restaurant community. Also, in January, an Instagram reel series featured over 20 participating local restaurants, accompanied by a giveaway of gift cards to select local restaurants and a collaboration reel with Enjoy SLO to further amplify the impact. Social media efforts in support of this strategy have garnered over 4M impression across Facebook and Instagram, and people who visited SLOCAL.com stayed on the site for more than two minutes.

## Destination Summit

In November 2022, VSC hosted its annual Destination Summit for more than 200 attendees. Chuck Davison, president & ceo of Visit SLO CAL provided a keynote address highlighting the performance of the local tourism industry and the work of VSC. Adam Sacks, president of Tourism Economics, also provided a keynote address, speaking on the state of the local economy amidst the fears of a recession.

Discussion Panels in the afternoon focused on sustainability and the power of social media. The programming was rounded out with a reception featuring local wine and beer as well as a shopping experience featuring several SLO CAL Crafted Partners.





## Film SLO CAL

Film SLO CAL, a division of Visit SLO CAL, and the film commission for San Luis Obispo County, promotes, facilitates and tracks film production throughout San Luis Obispo County. Film SLO CAL held a board seat on FLICS, the statewide professional association of 40+ Film Commissions.

In association with Film SLO CAL's partnership with the SLO International Film Festival, a scouting FAM tour was hosted for five active film professionals associated with Film California, Teamsters Local 399 and Location Managers Guild International. Notable top productions included a music video from award-winning pop artist 5 Seconds of Summer, numerous commercials by major consumer brands and a diverse range of projects spanning from Shark Week to Red Bull.



**91 PRODUCTIONS**



**194 FILMING DAYS**



**49 LEADS**



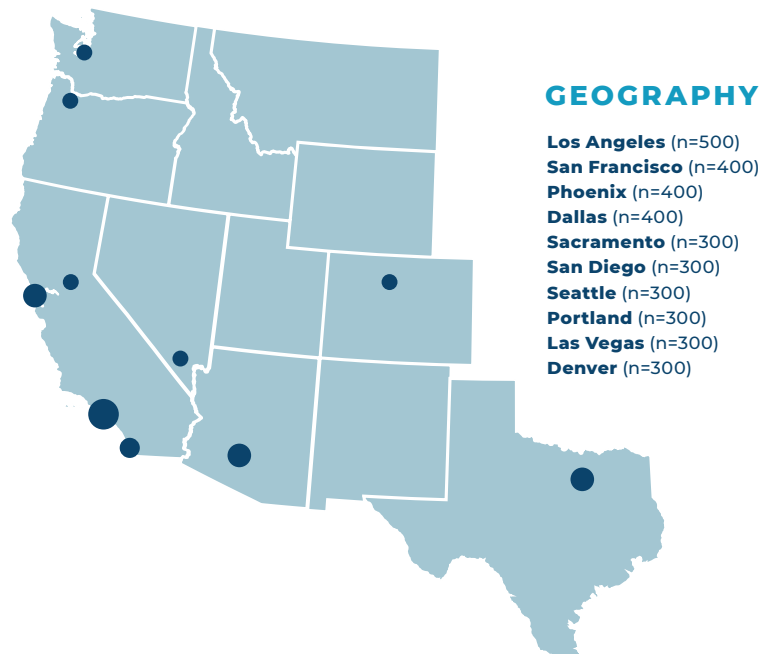
**\$1.5M** ESTIMATED SPEND  
IN SLO CAL



# Brand Awareness Study

Visit SLO CAL engaged Heart+Mind Strategies to conduct a Brand Awareness Study to determine the impact of the “Land of” campaign on key performance indicators and assess return on investment from ad spend in FY 23. The Study was conducted from July to August 2023.

## METHODOLOGY



## Key Takeaways

- One in eight travelers (12%) in targeted DMAs recall having seen advertising for SLO CAL in the past year without prompting. Up from 9% in 2022.
- The ads are universally well liked, with 96% having a favorable impression of the ads.
- The ads are effective at communicating the idea that “life is too beautiful to rush.” Travelers also agree that the ads help broaden their understanding of the SLO CAL experience and inspire them to visit more than one town when they travel to SLO CAL.
- Ad awareness has a positive impact on all brand metrics, as those who recall seeing the ads are more likely to consider traveling to SLO CAL in the future and have more positive perceptions of SLO CAL.
- Additionally, those who recall seeing the ads are more likely than average to have visited SLO CAL, and when they do visit, they stay for more nights, visit more locations within the county and spend more money.
- The ad campaign has an estimated net positive economic contribution to SLO CAL and on tax revenue. Based on past behavior and future booked visits of those recalling ads, the campaign’s expected economic contribution is estimated to be \$1.0B-\$1.4B while expected room tax revenue generated by the campaign is estimated to be \$5.3M-\$7.7M, representing a 2:1 ratio of tax revenue vs. the cost of the campaign.

# Advocacy

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Visit SLO CAL advocates for local, state and federal policies that enhance the region's economic vitality and resident quality of life. It ensures the tourism industry's perspectives are being considered when key policy issues are being discussed and works collaboratively with partners and stakeholders to develop innovative, sensible policy solutions.

## Industry Advisory Group

VSC engaged its newly elected California State Senator and government officials in the seven local cities and County of San Luis Obispo. In presenting the tourism industry's positive economic impact in our communities, advocacy efforts highlight the tangible benefits and the ongoing commitment to enhance the region's economic vitality and resident quality of life.

## Tourism Advocacy Partnerships with CalTravel

VSC is committed to aligning advocacy efforts as part of a unified industry voice in local, state and federal policies to ensure the tourism industry's perspective and messages are heard. In partnership with California Travel Association and U.S. Travel Association, VSC is positioned to identify, support or oppose policies that impact the tourism industry.

Engaged, influential and holding key positions in CalTravel, VSC's team is working closely with industry advocacy partners in actively representing the interests of investors, stakeholders and partners. President & CEO Chuck Davison served as the Vice Chair in FY 23.

## Advocacy Support & Engagement

In FY 23, VSC engaged with lawmakers to advocate for policy issues and legislation to advance the economic interests of tourism by delivering dozens of advocacy letters and presenting testimony at hearings on key regional issues.

## Oceano Dunes Stewardship Study

Complimented by close stakeholder collaboration and strategic media engagement, VSC, in partnership with the County of San Luis Obispo and the Cities of Arroyo Grande, Grover Beach and Pismo Beach, successfully published the Oceano Dunes Stewardship Study. The study presented opportunities to advance future stewardship recommendations in an effort to mitigate the economic impact of permanently reduced or a complete phase-out of off-road vehicle use at Oceano Dunes.



# Diversity, Equity & Inclusion

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Visit SLO CAL is committed to fostering a culture of diversity, equity and inclusion (DEI), exemplified by our ongoing efforts outlined in this report. VSC has spearheaded initiatives to amplify these principles within the organization and across the vibrant communities we serve. VSC's pursuit of an inclusive environment underscores our mission to ensure that every visitor and resident traversing our county feels acknowledged and wholeheartedly embraced.

## Creating Authentic DEI Content & Marketing Experiences

VSC spotlighted DEI on owned channels, with blog features and social media promotions pointing back to SLOCAL.com. With the goal of bringing authentic faces and stories of SLO CAL to life, VSC worked with local DEI community-based organizations to promote inclusive cross-visitation opportunities for tourists looking to support Women's History Month, Black History Month and Asian American and Pacific Islander (AAPI) Heritage Month. A first for the company, a Spanish language partner video surrounding Nancy Ulloa of Ulloa Cellars, a female winemaker in the region, was launched. All profiles are archived on an DEI landing page as well as on VSC's social media channels.

## DEI-Focused Community Relations

VSC is dedicated to fostering a harmonious visitor experience and elevating our residents' overall quality of life. We actively engage in dialogues and industry forums that proactively strive to enhance the experience for every individual. Through strategic alliances and meaningful collaborations, VSC remains steadfast in its commitment to advancing the principles of DEI across all touchpoints and fulfilling the commitments outlined in our DEI Statement.



# Experience SLO CAL 2050

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Visit SLO CAL made strides in FY 23 advancing and launching key Experience SLO CAL (ESC) 2050 recommendations. SLO CAL Welcome, the customer service training developed for the SLO CAL Travel & Tourism Industry launched in November 2022. New thematic routes centered around such topics as major motion pictures that were filmed in SLO CAL were released to promote cross visitation. Finally, a countywide Events & Festivals Strategy was developed in partnership with VSC, key partners and city/county stakeholders to further advance a countywide strategy.

## Air Service Development

In partnership with the San Luis Obispo County Regional Airport, VSC continued to advance its air service recovery strategy in an effort to grow supply and strengthen demand for regional air service. In October 2022, American Airlines upgauged DFW service to an A319 aircraft increasing seat capacity by 60%. In June 2023, Alaska Airlines announced new daily nonstop service from Las Vegas beginning in December 2023, connecting SLO CAL to its top air service demand market. Beginning in Fall 2023, United Airlines will up-gauge service from Denver to an A319 aircraft. VSC will continue to partner with the airport to advance air service connectivity for the region.

## Events & Festivals Strategy

In Spring 2022, VSC, in collaboration with MMGY NextFactor and SLO CAL partners and city/county stakeholders, finalized a countywide Events & Festivals Strategy. The strategic focus is to not only welcome events and festivals that contribute to the experience of SLO CAL visitors and positive economic vitality of communities while respecting the quality of life of our residents, but also to provide tools and resources to assist local communities in growing midweek and off-peak visitation while maintaining and improving resident quality of life.

## SLO CAL Welcome Customer Service Training

In the fall of 2022, VSC launched SLO CAL Welcome, a first-of-its-kind, free, online, self-paced customer service training program developed specifically for the travel & tourism industry. The program was made available in both English and Spanish and has seen significant success throughout SLO CAL. Since the program launched, over 700 customer-facing staff have gone through the program and are now considered certified SLO CAL Welcome Experts. Many Travel & Tourism businesses throughout SLO CAL who put the majority of their customer-facing staff through the program, are now recognized as SLO CAL Welcome Experts in Service. The program development was a countywide collaborative effort and will continue as a valuable resource to assist with increased customer satisfaction across SLO CAL.

## Thematic Routes

In Spring of 2023, the completion of the SLO CAL Film Trail, part of the Thematic Routes ESC 2050 recommendation, was created and will be included in the promotion of current trails through FY 24: Sustainable Wineries, EV Charging Stations, Antiques Trail, Breweries Trail and Mural trail.





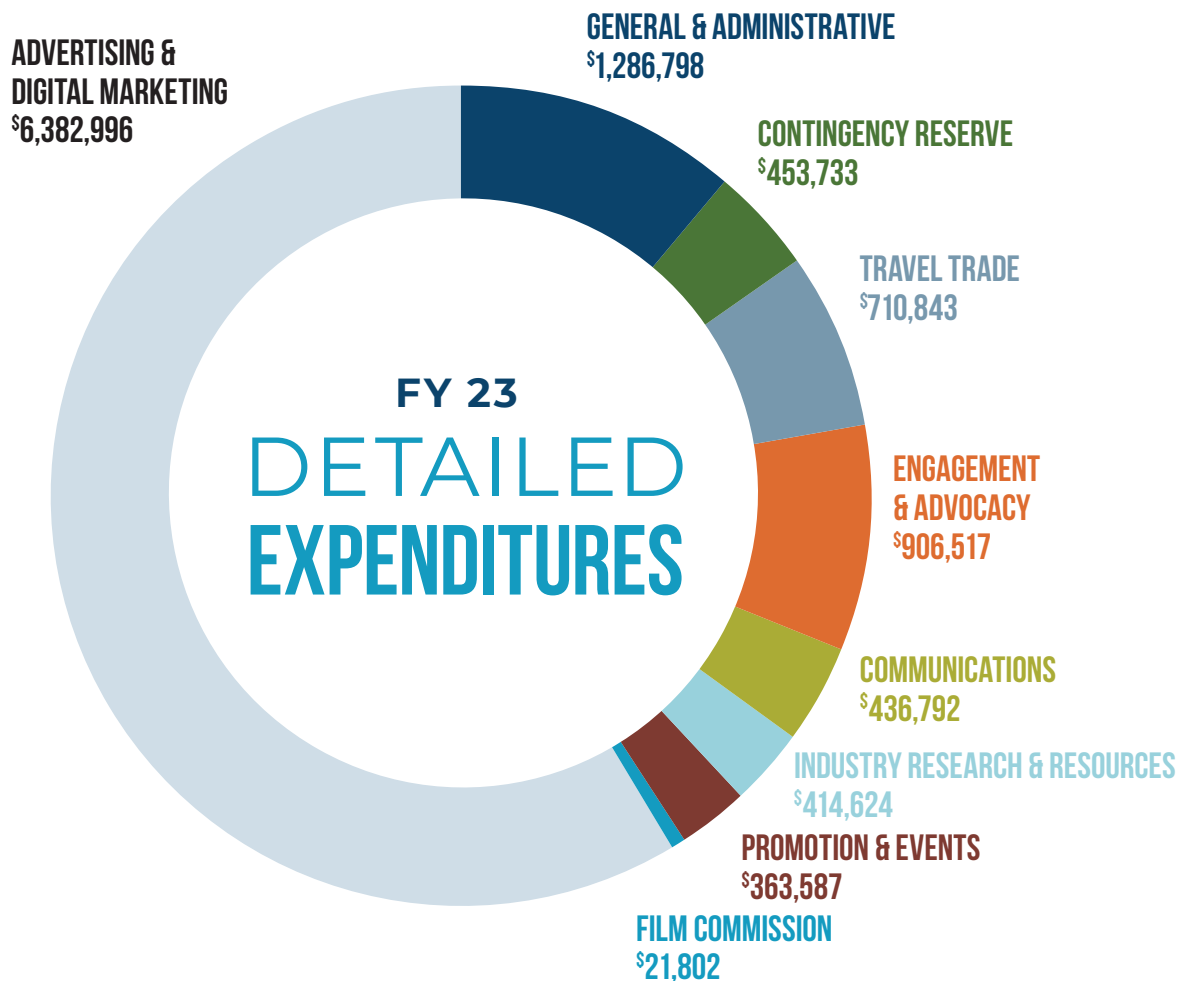
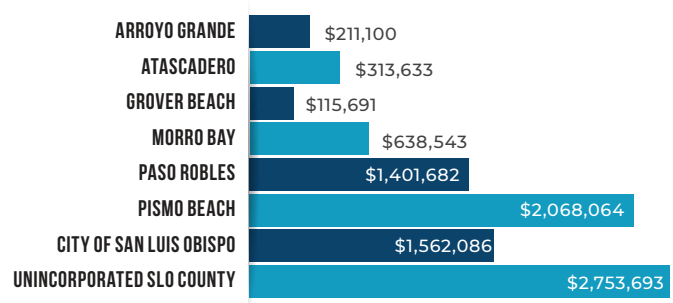


# Expenditures

## Method of Basis of Levying Assessment

The annual assessment rate is 1.5% of gross short-term (stays 30 or fewer consecutive days) room rental revenue. The county and each city are responsible for collecting the assessment from lodging businesses within their respective jurisdictions on a monthly or quarterly basis, including any delinquencies, penalties and/or interest. Within 30 days of receipt, the county and each city then forward the assessments collected to the Tourism Marketing District (TMD) managed by Visit SLO CAL.

## ASSESSED FUNDS FROM FY 23\*



\*Collections remitted from July 1, 2022, to June 30, 2023, including adjustments made for current year remittances that varied from accrued amounts.

# FY 24 Budget

ESTIMATED COST OF  
PROVIDING ACTIVITIES  
IN THE NEXT FISCAL YEAR

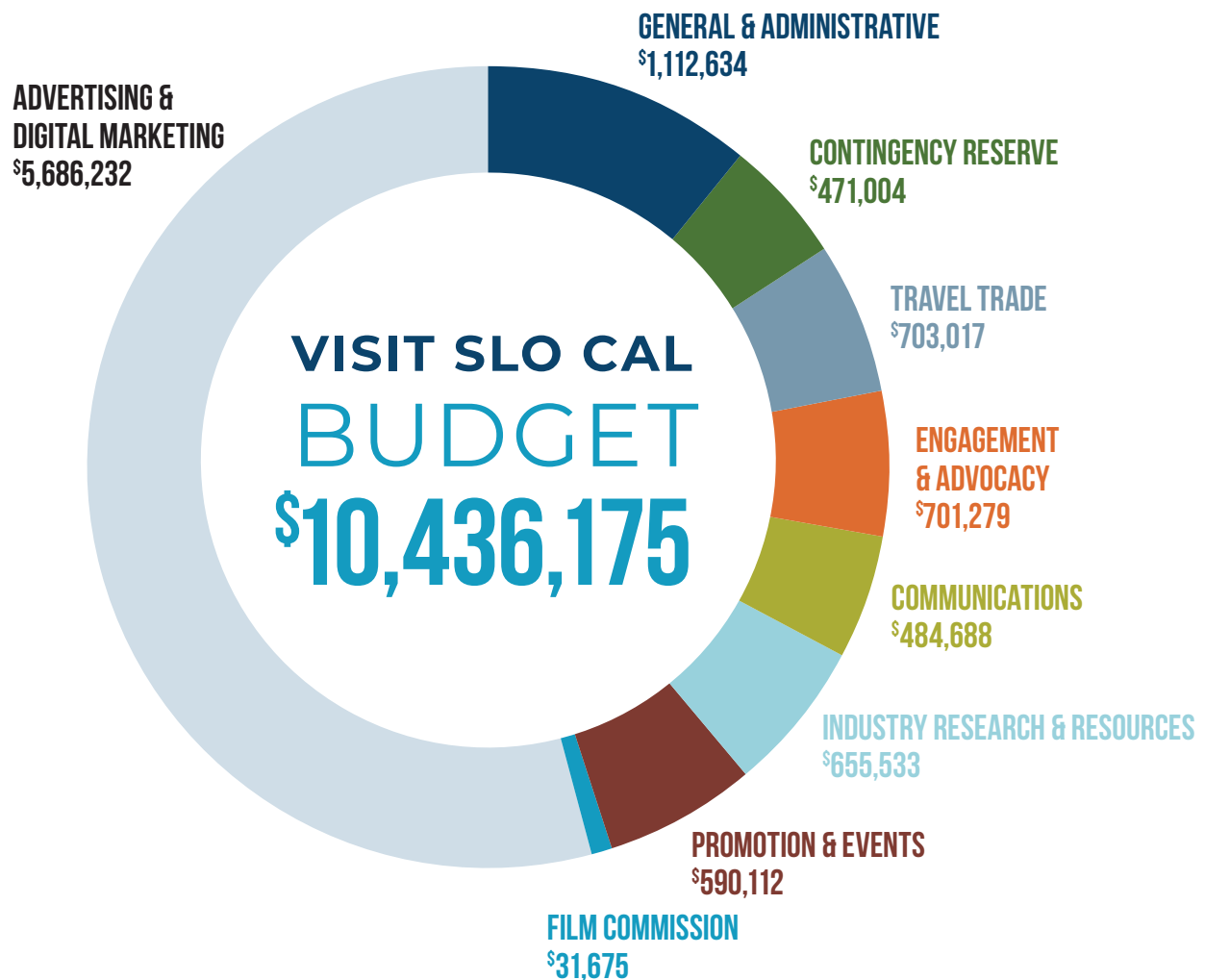
**\$10,436,175**

ESTIMATED  
CONTRIBUTION FROM  
NON-ASSESSMENT SOURCES

**\$103,450**

ESTIMATED PRIOR YEARS'  
CUMULATIVE SURPLUS CARRIED  
FORWARD TO FY 24

**\$2,701,586**



# Moving Forward

Visit SLO CAL has defined four overarching organizational objectives known as Strategic Direction 2026. Below are the objectives and measurable key results the organization intends to achieve before the end of the fiscal year 2026. Annually, the organization sets forth strategies and Key Results for each department that ladder up to these longer-term objectives. For more information on VSC's FY 24 Objectives and Key Results, please visit [SLOCAL.com/partners/research-resources](https://SLOCAL.com/partners/research-resources).

## Objective 1

Enhance our organizational effectiveness

### KEY RESULTS

- Maintain or grow annual employee engagement score over 2023 baseline
- Grow average employee satisfaction on quarterly survey over 2023 baseline
- Grow values alignment score on quarterly employee survey over 2023 baseline

## Objective 2

Amplify and steward the SLO CAL brand through unified efforts

### KEY RESULTS

- Year-over-year increase in unaided visitor Net Promoter Score from baseline of -9
- Grow incremental travel impact as measured by return on ad spend (ROAS) in the annual Brand Awareness Study
- Grow partner participation in Visit SLO CAL marketing efforts
- Increase cross-visitation over FY 24 baseline







## Objective 3

Lead the county tourism industry in fostering a vibrant destination

### KEY RESULTS

- Deliver Sustainable Tourism Strategy by June 30, 2024
- Deliver Regional Tourism Industry Workforce Plan by June 30, 2025
- Outperform statewide tourism economic impact growth

## Objective 4

Demonstrate value to investors, partners, stakeholders and communities

### KEY RESULTS

- Maintain or improve resident sentiment score over baseline of 2023 survey
- Year-over-year increase in investor, partner and stakeholder engagement over FY 24 baseline





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