



# AGENDA

## Visit SLO CAL Board of Directors

### Visit SLO CAL Board of Directors Annual Meeting Agenda

Wednesday, June 16, 2021

8:30am-10:30am

Embassy Suites, 333 Madonna Road, San Luis Obispo, CA 93405

Videoconference: <https://us02web.zoom.us/j/85985719714> Meeting ID: 859 8571 9714

Call-In Phone: (669) 900-6833

1. CALL TO ORDER
2. PUBLIC COMMENT (On Non-Agenda Items)

<b>ANNOUNCEMENTS</b>	<b>C. Davison</b>
----------------------	-------------------

<b>CONSENT AGENDA – motion required</b>	<b>C. Davison</b>
---	-------------------

3. Approval of May 19, 2021 Board of Directors Meeting Minutes
4. Approval of May 2021 Visit SLO CAL Financials
5. Appointment of FY 2021 Marketing Committee Seats
6. Ratification of Jed Bickel's Appointed Board Seat
7. Ratification of Sam Miller's Appointed Board Seat
8. Ratification of Victor Popp's Appointed Board Seat
9. Selection of Visit SLO CAL's FY 2021 Auditor

*Staff will request Board approval of the May 19, 2021 Board of Directors Meeting Minutes, May 2021 Visit SLO CAL Financials, the FY 2022 slate of Marketing Committee seats, the ratification of re-appointed board seats held by Jed Bickel, Sam Miller and Victor Popp, and the selection of Visit SLO CAL's FY 2021 auditor.*

<b>CEO REPORT</b>	<b>C. Davison</b>
-------------------	-------------------

10. CEO Report (20 min)

*Staff will provide an update on current projects, reporting and areas of focus for the months ahead.*

<b>BUSINESS ITEMS</b>	<b>C. Davison</b>
-----------------------	-------------------

11. FY 2022 Business & Marketing Plan (30 min) – motion required

*The Board will review Visit SLO CAL's proposed FY 2022 Business & Marketing Plan and will consider a recommendation for approval.*

12. FY2022 Budget (30 min) – motion required

*The Board will review Visit SLO CAL's FY 2022 proposed annual budget and will consider a recommendation for approval.*

13. Travel Trade & Marketing Update (15 min)

*Staff will provide an update on key travel trade and marketing initiatives, and an update on Mering's progress on their scope of work.*

<b>ANNOUNCEMENT OF CLOSED SESSION ITEM(S)</b>
---

<b>C. Davison</b>
-------------------

**14. Employee Dismissal** *(15 min)*

<b>CLOSED SESSION REPORT</b>
------------------------------

<b>C. Davison</b>
-------------------

**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 Board of Directors to discuss or take action on issues not on the agenda, except that members of the Board may briefly respond to statements made or questions posed by the person giving public comment. Staff may be directed by the Board 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 Board.

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 Board of Directors

### Visit SLO CAL Board of Directors

#### Meeting Minutes

Wednesday, May 19, 2021

8:30am-10:30am

Embassy Suites, 333 Madonna Road, San Luis Obispo, CA 93405

Video Conference Option - URL: <https://us02web.zoom.us/j/83337389599>

Meeting ID: 833 3738 9599

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

#### 1. CALL TO ORDER: Clint Pearce

**PRESENT:** Jed Bickel, Kathy Bonelli, John Conner, Mark Eads, Aaron Graves, Jay Jamison, Amit Patel, Hemant Patel, Nipool Patel, Clint Pearce, Victor Popp, Amar Sohi

**PRESENT (VIA VIDEOCONFERENCE):** Jim Hamilton, Toni LeGras, Sam Miller

**ABSENT:** Alma Ayon

**STAFF PRESENT:** Chuck Davison, Cathy Cartier, Annie Frew, Brendan Pringle, Kyla Boast

**Call to Order at 8:32am.**

---

#### 2. PUBLIC COMMENT (On Non-Agenda Items)

None.

#### ANNOUNCEMENTS

Davison announced that Cathy Cartier has accepted the full-time role of Chief Marketing Officer at Visit SLO CAL, effective June 1, 2021. Cathy will continue to commute to SLO CAL for at least 2 weeks of each month, before fully re-locating to SLO CAL by the end of October 2021.

#### CONSENT AGENDA

##### 3. Approval of March 17, 2021 Board of Directors Meeting Minutes

##### 4. Approval of March 2021 Visit SLO CAL Financials

##### 5. Approval of April 2021 Visit SLO CAL Financials

Public Comment – None.

Board Discussion.

**ACTION:** Moved by Conner/N. Patel to approve the Consent Agenda as presented.

Motion carried: 14:0  
Miller joined the meeting after the Consent Agenda item.

## **CEO REPORT**

### **6. CEO Report**

Davison thanked the Board members who attended the Annual Bash on May 5, 2021. Davison reminded the Board that Visit SLO CAL will be holding its bi-annual Advisory Committee meeting virtually on June 3, 2021, from 3:00-4:30pm, and encouraged Board members to attend so that they would be aware of the input provided by the elected officials and city managers from each community and offer feedback on suggestions and recommendations. Davison provided an update on the Oceano Dunes Economic Impact Assessment, noting that staff will work to solidify support from Arroyo Grande and Pismo Beach in the coming weeks, and will run a parallel track to vet potential agencies, review proposals with a small cohort of partners, and agree upon the agency conducting the scope of work. Davison provided an update on recent elected official outreach, and noted that Visit SLO CAL will be hosting its bi-annual Hospitality Owners Roundtable with Rep. Salud Carbajal on May 27, 2021 and a virtual Hospitality Owners Roundtable on June 9, 2021 with Assembly Member Jordan Cunningham. Davison outlined progress and next steps on the Events & Festivals Strategy recommendation from Experience SLO CAL 2050. The project scope for the Events & Festivals Strategy was sent to potential agencies in an RFP process, and staff is reviewing the proposals and identifying an agency who can successfully fulfill the initiative. He noted that based on Board direction and cost, Visit SLO CAL will obtain signed MOUs from each municipality prior to requesting proposal approval from the Board to assure the Strategy can be implemented. He also outlined progress and next steps for the Customer Service Training Program. Staff is currently reviewing proposals for consideration. Davison noted that Visit SLO CAL has created a landing page for open positions in the travel and tourism industry. He encouraged the Board to let staff know about open positions, and noted that, as agreed during the April Executive Committee meeting, Visit SLO CAL will not be putting advertising dollars toward this initiative. Davison informed the Board that he would be taking his sabbatical, one of the conditions of his contract renewal, from June 25-August 1. He noted that he is working with staff to develop a robust plan of action for the business while he is away, and noted that Cartier will be overseeing the business while he is away, and that Pringle will have specific areas of oversight and will be an additional contact during this time.

Public Comment – None.

Board Discussion.

## **BUSINESS ITEMS**

### **7. COVID-19 Impact & Response Update**

Davison provided an update on local COVID-19 response efforts. Over 245,000 vaccines have been distributed locally, and SLO County now has mobile vaccination sites available upon request. At the state level, over 20 million people have received at least one dose in California, and 16 million are fully vaccinated. The state plans to fully re-open on June 15, 2021. Davison noted that SB 93, a law that mandates the rehiring of workers in the hospitality and business services industries to offer new positions to qualified former employees laid off due to COVID-19, was signed into law and is effective through 2024. He noted that SB 285 – the California Tourism Recovery Act, which would support Visit California's tourism recovery efforts with \$45 million – was pulled from the Senate Appropriations Committee suspense file to include in the Senate budget proposal, but that Governor Newsom also announced last week that he will propose a \$95 million investment in Visit California's tourism recovery efforts. Davison provided statistics, at a national level, about travel spending and consumer readiness to travel. Davison provided an update on air service. He noted that Visit SLO CAL's application request for a targeted EIDL advance of \$10,000 was declined. Davison reviewed the updated cash flow projections for May through December 2021 and the STR report for April 2021 vs. April 2019, noting that ADR countywide was up 16.5 percent and demand was up 2.2 percent, despite a 9.8 percent increase in inventory.

Public Comment – None.

Board Discussion.

### **8. Camp Roberts Update**



A US Government project RFP in the works at Camp Roberts will require accommodations for thousands of proposed government contractors beginning May 10 for up to 12 months. Visit SLO CAL has raised concerns over infrastructure with local, state and federal government officials, including a call last week with Wade Horton, County CAO, and officials from the U.S. Department of Health & Human Services (HHS). HHS revealed a general lack of details about this project, estimating the number of migrant children being served to be no more than 10,000, but likely between 2,500 and 3,000. Before the call, HHS had not considered alternative housing at Camp SLO, Mid State Fair Grounds, Cal Poly, or other locations, but are now reaching out. HHS could not speak to why workers were being contracted now as the activation of Camp Roberts as a location has not been finalized, and they would not expect children to arrive until July 1, 2021 or later, if a contract for Camp Roberts is even executed. HHS informed Visit SLO CAL that room contract would be at \$120 per night, and if anyone is paying more, it is likely brokers looking to sell the rooms back to the government. They also confirmed that the rooms are, in fact, tax exempt and will not be paying TOT or assessments. Visit SLO CAL is encouraging hotels not to accept this business based on summer demand yielding a higher rate, and because local governments need TOT funds to bring their communities back from the pandemic. Additionally, these workers would not be likely visiting local hospitality establishments the way traditional tourism visitors do, which could create significant challenges for local businesses. Davison noted as a positive that this would introduce a new audience of potential future travelers to the market, and local supply purchasing would occur locally, which could help other local businesses. Davison outlined Visit SLO CAL's response, including an email that staff sent to its list of lodging investors highlighting the repercussions of signing these room contracts. Davison noted that it is ultimately up to the hotels on whether they accept the business, but the cities would ultimately suffer the consequences, which is why we are encouraging them to request mitigation. Visit SLO CAL will continue to provide updates to investors as it continues to gain an understanding of the size and scope of this business, and will be sending an email to mayors and city managers to bring awareness to the issue, outlining the loss of revenue and subsequent impacts for each city. Additionally, staff is finalizing a strategic communications plan for investors, partners and stakeholders communication over the coming weeks.

Public Comment – None.

Board Discussion.

## **9. Equity, Diversity & Inclusion Tracking**

In June 2020, the Board approved its Equity, Diversity & Inclusion (EDI) Plan. Davison reminded the board of the actions that Visit SLO CAL committed to in that Plan. He outlined progress to date. Three members of Visit SLO CAL Leadership Team are currently taking a 12-month EDI Masterclass through Destinations International, and staff is vetting agencies to conduct a staff, board and committee training, and create a training for onboarding of new Visit SLO CAL Board, Marketing Committee and team members. The marketing team has prioritized EDI through planned media campaigns and the EDI tracking matrix (included in the agenda packet), working with local EDI community-based organizations to ensure authentic voices for its social media campaigns, and featuring local travel and tourism businesses. All media campaigns remain focused on highlighting the destination, in this case through a different lens. He outlined some of Visit SLO CAL's recent campaigns, including Black History Month, Women's History Month, and AAPI Heritage Month, and noted some of the upcoming campaigns. Visit SLO CAL is also planning for an EDI audience and asset alignment study to inform product and service development, and provide information on tourism experiences that currently meet or exceed visitor expectations. He noted that this study would also be available as a co-op so that local destination partners can partner to gain insight into their individual community.

Public Comment – None.

Board Discussion. Sohi complimented Visit SLO CAL on continuing their EDI efforts, when for many this seemed to be short lived, for Visit SLO CAL it is clear it is still a priority.

## **10. Board of Directors Seats**

Davison outlined the status on the four appointed seats that are currently up for renewal. These include Jed Bickel (Pismo Beach), Victor Popp (Paso Robles), Sam Miller (Grover Beach) and the open seat for Arroyo Grande. Davison noted that the three renewing seats are in the re-appointment process, and that with no recommended candidate, the Arroyo Grande seat

will be held open. He noted that two elected seats are currently up for renewal - the designated B&B seat (currently held by Alma Ayon) and one at-large seat (currently held by Amit Patel). The application process opened on April 23, 2021, and closed on May 7, 2021, and Visit SLO CAL received six total applications, one of which arrived after the deadline. Davison reviewed the applicants (Alma Ayon, Sundance B&B; Amit Patel, New Horizon Associates, Inc.; Tom Halen, La Lomita Ranch B&B; Kevin Beall, PRG Hospitality Group; Leslie McKinley, SLO Lakeside Lodge; and John Maher, Motel 6 Atascadero and Motel 6 North). Davison noted that John's application arrived three days after the deadline. Davison noted that at the renewal of the Tourism Marketing District, the Board was expanded by four seats, two of which remained vacant to ensure a larger pool of qualified candidates (GMs and owners) at a time when they were not simply trying to weather the impact of COVID-19. Many investors are still focused on the rebound and now staffing issues. Davison noted that there is the option to hold a special meeting to elect the remaining seats later in the year or wait until the next Annual Meeting in May 2022. At their May 13, 2021 meeting, the Executive Committee recommended re-electing Alma Ayon to the open B&B Seat and re-electing Amit Patel to the open at-large seat on the Visit SLO CAL Board.

Public Comment – None

Board Discussion.

**ACTION:** Moved by Bickel/Popp to re-elect Alma Ayon to the open B&B Seat and re-elect Amit Patel to the open at-large seat on the Visit SLO CAL Board, and to hold the other two seats open, as recommended by the Executive Committee.

**Motion carried: 13:0:1**

**Hamilton departed the meeting prior to this item.**

**A. Patel abstained.**

## **11. Executive Committee Seats**

Davison outlined the current structure of the Executive Committee: Chair - Clint Pearce; Vice Chair - Hemant Patel; Secretary - Mark Eads; Treasurer - Aaron Graves; At-Large Member - Amar Sohi. New seats, once appointed, would be effective July 1, 2021 for FY 2022. At their May 13, 2021 meeting, the Executive Committee recommended the following slate: Chair - Hemant Patel; Vice Chair - Aaron Graves; Secretary - Mark Eads; Treasurer - Amar Sohi; Past Chair - Clint Pearce.

Public Comment – None

Board Discussion. Popp expressed gratitude to Pearce on representing the organization well as Chair for years.

**ACTION:** Moved by Popp/Jamison to appoint Hemant Patel as Chair, Aaron Graves as Vice Chair, Mark Eads as Secretary, Amar Sohi as Treasurer, and Clint Pearce as Past Chair.

**Motion carried: 9:0:5**

**H. Patel, Graves, Eads, Sohi and Pearce abstained.**

## **12. EDI Audience & Asset Alignment Study & Visitor Profile Study**

In order to inform our efforts in FY 2022 scope of work, staff is requesting the launch of two studies (an EDI Audience & Asset Alignment Study and Visitor Profile Study) prior to the end of FY 2021. Staff is requesting approval in advance of next month's FY 2022 budget review in order to get a head start on the work. Cartier noted the purpose and timeline of both studies. The EDI Audience & Asset Alignment Study would develop an understanding of what SLO CAL can authentically own for the diverse visitors it is trying to attract, and would have a co-op opportunity for local communities. The Visitor Profile Study would provide a profile of potential visitors and establish a baseline, identify motivations for current and potential visitors, develop visitor personas, and identify visitor perceptions. The last Visitor Profile study Visit SLO CAL conducted was in 2016 to inform the development of the brand. These would allow Visit SLO CAL and Mering to be more strategic in their marketing and advertising placement. Davison clarified that it is not a campaign effectiveness study. Proposals were

received for both on May 17, 2021, and the estimated budget (combined) for both studies would be \$198k if performed by the same consultant.

Public Comment – None

Board Discussion.

**ACTION:** Moved by N. Patel/Sohi to allow the President & CEO to negotiate agreements and fund an EDI Audience & Asset Alignment Study and Visitor Profile Study, at a cost not to exceed \$198k.

**Motion carried: 14:0**

### **13. Travel Trade & Marketing Update**

Cartier provided an update on Mering's progress as our agency of record. She noted that Mering completed four online focus groups with past visitors to test the brand tenets in May, and that the Focus groups featured participants from Los Angeles, San Francisco, San Diego and out-of-state. Research was designed to: 1) Understand top-of-mind perceptions of SLO CAL and the SLO CAL "lifestyle"; 2) Gauge reactions to a refined SLO CAL brand positioning expression/tenets; and 3) Probe holistic versus specific knowledge of the region and towns. Cartier reported out on the topline findings. Visit SLO CAL hosted four members of the Mering team on an immersion experience throughout the county, following the Marketing Retreat in April. Visit SLO CAL wanted to ensure Mering explored the entire county, and understood the differences between communities. Cartier also noted that Mering has outlined the key steps in the Phase I adoption of the House of Brands Strategy, which will be defined further in the FY 2022 Business & Marketing Plan. Mering will be in-market capturing new campaign assets from August 3-8, 2021, prior to the ad campaign launching in September. These costs will be included in the FY 2022 Budget presented to the Board at the June 16, 2021 meeting for their approval.

Public Comment – None

Board Discussion.

### **ANNOUNCEMENT OF CLOSED SESSION ITEM**

#### **14. Employee Dismissal**

#### **CLOSED SESSION REPORT**

No action was taken by the Board during Closed Session.

Davison noted upcoming agenda items.

### **ADJOURNMENT**

Adjourned at 10:36am.

San Luis Obispo County  
Visitors & Conference Bureau  
2020-2021 Financial Summary - May

Income	This Month	Budgeted for Month	MTD Variance	% Variance	MTD % of Total Income/ Expenses	FISCAL YTD	Budget YTD	YTD Variance	% Variance	YTD % of Total Income/ Expenses
Web & Ticket Revenue	\$ 638	\$ 700	\$ (62)	-8.86%	0.08%	\$ 9,549	\$ 9,700	\$ (151)	-1.56%	0.16%
Co-op Revenue	\$ 252	\$ -	\$ 252	100.00%	0.03%	\$ 504	\$ -	\$ -	100.00%	0.01%
Interest Income	\$ (92)	\$ 500	\$ (592)	-118.40%	-0.01%	\$ 2,808	\$ 4,620	\$ (1,812)	-39.22%	0.05%
<b>TMD Income</b>										
Collected from Prior Year Assessments	\$ -	\$ -	\$ -	0.00%	0.00%	\$ 111,509	\$ 111,509	\$ -	0.00%	1.88%
Arroyo Grande	\$ 9,789	\$ 9,789	\$ -	0.00%	1.21%	\$ 93,226	\$ 93,226	\$ -	0.00%	1.57%
Atascadero **	\$ -	\$ -	\$ -	0.00%	0.00%	\$ 88,155	\$ 88,155	\$ -	0.00%	1.49%
Grover Beach	\$ 3,837	\$ 3,837	\$ -	0.00%	0.47%	\$ 36,814	\$ 36,814	\$ -	0.00%	0.62%
Morro Bay	\$ 44,142	\$ 44,142	\$ -	0.00%	5.43%	\$ 312,092	\$ 312,092	\$ -	0.00%	5.27%
Paso Robles	\$ 56,884	\$ 56,884	\$ -	0.00%	7.00%	\$ 460,907	\$ 460,907	\$ -	0.00%	7.78%
Pismo Beach	\$ 195,865	\$ 195,865	\$ -	0.00%	24.11%	\$ 1,274,739	\$ 1,274,739	\$ -	0.00%	21.53%
City of San Luis Obispo	\$ 95,890	\$ 95,890	\$ -	0.00%	11.80%	\$ 666,822	\$ 666,822	\$ -	0.00%	11.26%
Unincorporated SLO County	\$ 119,954	\$ 119,954	\$ -	0.00%	14.77%	\$ 1,081,576	\$ 1,081,576	\$ -	0.00%	18.26%
Adjustment for Actual TMD Collected	\$ 285,129	\$ -	\$ 285,129	100.00%	35.10%	\$ 1,783,359	\$ 1,159,597	\$ 623,762	53.79%	30.11%
<b>Total TMD Income</b>	<b>\$ 811,489</b>	<b>\$ 526,360</b>	<b>\$ 285,129</b>	<b>54.17%</b>	<b>99.90%</b>	<b>\$ 5,909,201</b>	<b>\$ 5,285,439</b>	<b>\$ 623,762</b>	<b>11.80%</b>	<b>727.48%</b>
<b>Total Income</b>	<b>\$ 812,287</b>	<b>\$ 527,560</b>	<b>\$ 284,727</b>	<b>53.97%</b>	<b>100.00%</b>	<b>\$ 5,922,062</b>	<b>\$ 5,299,759</b>	<b>\$ 622,303</b>	<b>11.73%</b>	<b>100.00%</b>
** District pays quarterly										
<b>Expenses</b>										
Contingency Reserve	\$ 40,606	\$ 26,353	\$ 14,253	54.09%	7.66%	\$ 721,781	\$ 264,757	\$ 457,025	172.62%	15.53%
G&A	\$ 25,356	\$ 35,974	\$ (10,618)	-29.52%	4.78%	\$ 239,378	\$ 262,802	\$ (23,424)	-8.91%	5.15%
Industry Research and Resources	\$ 22,159	\$ 29,997	\$ (7,838)	-26.13%	4.18%	\$ 170,514	\$ 222,044	\$ (51,530)	-23.21%	3.67%
Travel Trade	\$ 58,171	\$ 55,570	\$ 2,601	4.68%	10.98%	\$ 202,580	\$ 213,826	\$ (11,246)	-5.26%	4.36%
Communications	\$ 19,017	\$ 26,841	\$ (7,824)	-29.15%	3.59%	\$ 166,021	\$ 201,371	\$ (35,350)	-17.55%	3.57%
Advertising	\$ 300,292	\$ 264,182	\$ 36,110	13.67%	56.67%	\$ 2,529,859	\$ 2,524,290	\$ 5,570	0.22%	54.44%
Promotions & Events	\$ 8,783	\$ 6,552	\$ 2,230	34.04%	1.66%	\$ 70,001	\$ 79,757	\$ (9,756)	-12.23%	1.51%
Digital Marketing	\$ 32,292	\$ 63,263	\$ (30,971)	-48.96%	6.09%	\$ 343,499	\$ 379,504	\$ (36,004)	-9.49%	7.39%
Film Commission	\$ 106	\$ 3,194	\$ (3,088)	-96.68%	0.02%	\$ 820	\$ 7,768	\$ (6,947)	-89.44%	0.02%
Engagement & Advocacy	\$ 23,149	\$ 52,971	\$ (29,822)	-56.30%	4.37%	\$ 202,412	\$ 303,907	\$ (101,495)	-33.40%	4.36%
<b>Total Expenses</b>	<b>\$ 529,932</b>	<b>\$ 564,898</b>	<b>\$ (34,966)</b>	<b>-6.19%</b>	<b>100.00%</b>	<b>\$ 4,646,866</b>	<b>\$ 4,460,025</b>	<b>\$ 186,842</b>	<b>4.19%</b>	<b>100.00%</b>
<b>Surplus(Deficit)</b>	<b>\$ 282,356</b>	<b>\$ (37,337)</b>	<b>\$ 319,693</b>	<b>856.23%</b>		<b>\$ 1,275,196</b>	<b>\$ 839,734</b>	<b>\$ 435,462</b>	<b>51.80%</b>	
<b>FY 16- FY 20 Surplus</b>						<b>\$ 1,130,000</b>				
<b>Total Cumulative Surplus</b>						<b>\$ 2,405,196</b>				

<b>Cash Flow</b>		
Surplus (Deficit)	\$ 282,356	\$ 1,275,196
Beginning Cash Balance	\$ 3,651,293	\$ 1,605,945
Change in Accounts Receivable	\$ (153,955)	\$ (525,798)
Change in Accrued Expenses	\$ (65,739)	\$ 390,090
Change in Prepaid Expenses	\$ 9,007	\$ 18,703
Change in Accounts Payable	\$ 93,856	\$ 371,507
Change in Reserve Contingency	\$ 40,606	\$ 721,781
<b>Visit SLO CAL Cash Balances</b>	<b>\$ 3,857,424</b>	<b>\$ 3,857,424</b>
Contingency Reserve - 5% of Cumulative Rev.	\$ (1,689,334)	\$ (1,689,334)
Liability on Balance Sheet		
<b>Net Available Cash</b>	<b>\$ 2,168,090</b>	<b>\$ 2,168,090</b>

**Notes:**

- \$282k surplus for May (\$320k larger surplus than budgeted). \$1.27 Million surplus year-to-date (\$435k larger surplus than budgeted).
- \$151k in Paycheck Protection Plan Proceeds was received in March. It was recorded as a liability on the Balance Sheet until the loan is forgiven, at which time it will be recognized as Income.
- May Interest Income is negative due to market fluctuations in Morgan Stanley investment accounts.
- All TMD amounts accrued through March have been collected.

**Visit SLO CAL**  
**Balance Sheet Prev Year Comparison**  
**As of May 31, 2021**

	May 31, 21	May 31, 20	\$ Change	% Change
<b>ASSETS</b>				
<b>Current Assets</b>				
Checking/Savings				
1010 · Bank of the Sierra - TMD	1,844,150.44	383,236.60	1,460,913.84	381.2%
1020 · Bank of the Sierra - Membership	297,243.05	257,891.41	39,351.64	15.3%
1030 · Morgan Stanley - TMD	1,608,572.40	866,395.94	742,176.46	85.7%
1040 · Morgan Stanley - Membership	107,458.57	106,811.44	647.13	0.6%
<b>Total Checking/Savings</b>	<b>3,857,424.46</b>	<b>1,614,335.39</b>	<b>2,243,089.07</b>	<b>139.0%</b>
Accounts Receivable				
1200 · Accounts Receivable	972,169.70	370,127.23	602,042.47	162.7%
<b>Total Accounts Receivable</b>	<b>972,169.70</b>	<b>370,127.23</b>	<b>602,042.47</b>	<b>162.7%</b>
<b>Other Current Assets</b>				
1320 · Prepaid Rent	4,369.95	4,369.95	0.00	0.0%
1340 · Workman's Comp Deposit	744.40	744.40	0.00	0.0%
1350 · Prepaid Expenses	74,654.59	105,390.47	-30,735.88	-29.2%
1330 · Employee Advances	74.85	7.26	67.59	931.0%
1499 · Undeposited Funds	0.00	24,119.80	-24,119.80	-100.0%
<b>Total Other Current Assets</b>	<b>79,843.79</b>	<b>134,631.88</b>	<b>-54,788.09</b>	<b>-40.7%</b>
<b>Total Current Assets</b>	<b>4,909,437.95</b>	<b>2,119,094.50</b>	<b>2,790,343.45</b>	<b>131.7%</b>
<b>Fixed Assets</b>				
1400 · Fixed Assets				
1405 · Computer Hardware/Software	37,349.33	37,349.33	0.00	0.0%
1410 · Furniture & Fixtures	101,040.00	101,040.00	0.00	0.0%
1415 · Leasehold Improvements	71,766.15	71,766.15	0.00	0.0%
1425 · Office Equipment	19,488.10	19,488.10	0.00	0.0%
<b>Total 1400 · Fixed Assets</b>	<b>229,643.58</b>	<b>229,643.58</b>	<b>0.00</b>	<b>0.0%</b>
1500 · Accumulated Depreciation				
1505 · Comp. Hdw'r/Sftwr. Acc. Depr.	-21,231.17	-21,231.17	0.00	0.0%
1510 · Furn. & Fixt. Accum. Depr.	-14,984.00	-14,984.00	0.00	0.0%
1515 · Leasehold Imp. Accum. Depr.	-5,959.00	-5,959.00	0.00	0.0%
1525 · Office Equip. Accum. Depr.	-26,197.00	-26,197.00	0.00	0.0%
<b>Total 1500 · Accumulated Depreciation</b>	<b>-68,371.17</b>	<b>-68,371.17</b>	<b>0.00</b>	<b>0.0%</b>
<b>Total Fixed Assets</b>	<b>161,272.41</b>	<b>161,272.41</b>	<b>0.00</b>	<b>0.0%</b>
<b>Other Assets</b>				
1600 · Intangibles				
1605 · Trademark - Slocal	15,750.00	15,750.00	0.00	0.0%
<b>Total 1600 · Intangibles</b>	<b>15,750.00</b>	<b>15,750.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>Total Other Assets</b>	<b>15,750.00</b>	<b>15,750.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>TOTAL ASSETS</b>	<b>5,086,460.36</b>	<b>2,296,116.91</b>	<b>2,790,343.45</b>	<b>121.5%</b>
<b>LIABILITIES &amp; EQUITY</b>				
<b>Liabilities</b>				
<b>Current Liabilities</b>				
Accounts Payable				
2000 · Accounts Payable	379,879.28	37,285.19	342,594.09	918.9%
<b>Total Accounts Payable</b>	<b>379,879.28</b>	<b>37,285.19</b>	<b>342,594.09</b>	<b>918.9%</b>
Credit Cards				
2060 · American Express Credit Card	35,598.87	-1,542.53	37,141.40	2,407.8%
<b>Total Credit Cards</b>	<b>35,598.87</b>	<b>-1,542.53</b>	<b>37,141.40</b>	<b>2,407.8%</b>
<b>Other Current Liabilities</b>				
2070 · Accrued Liabilities	235,618.50	4,783.00	230,835.50	4,826.2%
2010 · Deferred Revenue	3,278.60	0.00	3,278.60	100.0%
2100 · Payroll Liabilities				
2105 · 401K Deferred Savings Liability	0.01	0.00	0.01	100.0%
2115 · Company ETT Payable	0.00	3.23	-3.23	-100.0%
2125 · Company FUTA Payable	0.00	19.32	-19.32	-100.0%
2135 · Company SUI Payable	0.00	157.72	-157.72	-100.0%
2160 · Health Insurance Withheld	-1,029.74	-1,831.13	801.39	43.8%
<b>Total 2100 · Payroll Liabilities</b>	<b>-1,029.73</b>	<b>-1,650.86</b>	<b>621.13</b>	<b>37.6%</b>

10:09 PM

06/10/21

Accrual Basis

**Visit SLO CAL**  
**Balance Sheet Prev Year Comparison**  
**As of May 31, 2021**

	May 31, 21	May 31, 20	\$ Change	% Change
2200 · Coast National Line of Credit	151,056.00	0.00	151,056.00	100.0%
Total Other Current Liabilities	388,923.37	3,132.14	385,791.23	12,317.2%
Total Current Liabilities	804,401.52	38,874.80	765,526.72	1,969.2%
Total Liabilities	804,401.52	38,874.80	765,526.72	1,969.2%
Equity				
3120 · Reserved Earnings	1,689,334.04	958,819.47	730,514.57	76.2%
3130 · Retained Earnings	1,317,528.76	1,586,777.19	-269,248.43	-17.0%
Net Income	1,275,196.04	-288,354.55	1,563,550.59	542.2%
Total Equity	4,282,058.84	2,257,242.11	2,024,816.73	89.7%
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>5,086,460.36</b>	<b>2,296,116.91</b>	<b>2,790,343.45</b>	<b>121.5%</b>



## VISIT SLO CAL MARKETING COMMITTEE APPLICATION FORM

NAME OF APPLICANT: Lori Keller  
COMPANY: Blu Hotel Management  
ADDRESS: 2602 Silverwood Way, Paso Robles, CA 93446  
PHONE: 805-453-6022 EMAIL: lkeller@bluhotels.com  
TOTAL YEARS IN HOSPITALITY INDUSTRY: 30  
TOURISM-RELATED MARKETING EXPERIENCE:

Regional marketing roles with Harrah's Entertainment; VP Marketing for Pacifica Hotels

### Employment History

CURRENT EMPLOYER: Blu Hotel Management YRS OF SERVICE: 3  
TITLE: Principal  
PAST EMPLOYER: Martin Resorts YRS OF SERVICE: 5  
TITLE: VP Sales & Marketing/Chief Executive Officer

### Community/Board Involvement

ORGANIZATION: Visit SLO CAL marketing committee TITLE: member  
DATES OF INVOLVEMENT: current  
ORGANIZATION: Pismo Beach CVB TITLE: member  
DATES OF INVOLVEMENT: various terms through 6/18  
ORGANIZATION: Economic Vitality Corp TITLE: member  
DATES OF INVOLVEMENT: 6/16-6/18

Individuals interested in serving on the Marketing Committee should send this **Application Form**, along with a **cover letter** and any background (**resume or list of key accomplishments** – no more than two pages total) to demonstrate their active role in marketing, branding, public relations or digital media as it relates to tourism in San Luis Obispo County, to [Ashley@SLOCAL.com](mailto:Ashley@SLOCAL.com). For more information, contact Visit SLO CAL at (805) 541-8000.



2602 Silverwood Way  
Paso Robles, CA 93446

May 12, 2021

Regarding Visit SLO CAL Marketing Committee

To Whom It May Concern:

It would be my pleasure to serve on the Visit SLO CAL marketing committee for another term. I have watched the organization grown and change and would be eager to continue my commitment to bringing my background in marketing and a lodging perspective to help support the future efforts.

Regards,

Lori Keller





## Visit SLO CAL MARKETING COMMITTEE APPLICATION FORM

NAME OF APPLICANT: Lindsey Roberts  
COMPANY: Martin Resorts  
ADDRESS: PO Box 3650 Paso Robles, CA 93447  
PHONE: 714-882-9656 EMAIL: lindseyr@martinresorts.com  
TOTAL YEARS IN HOSPITALITY INDUSTRY: 11  
TOURISM-RELATED MARKETING EXPERIENCE:

Spearhead strategic marketing plans end-to-end across owned, paid, and earned initiatives



### Employment History

CURRENT EMPLOYER: Martin Resorts YRS OF SERVICE: 9  
TITLE: Director of Marketing  
PAST EMPLOYER: Sycamore Mineral Springs YRS OF SERVICE: 2  
TITLE: Front Desk Agent

### Community/Board Involvement

ORGANIZATION: Visit SLO CAL Marketing Committee TITLE: Member  
DATES OF INVOLVEMENT: 2018-2021  
ORGANIZATION: Cal Poly Alumni Association TITLE: Member  
DATES OF INVOLVEMENT: 2012-Present  
ORGANIZATION: HSMIA Central Coast TITLE: Member  
DATES OF INVOLVEMENT: 2013-2014

Individuals interested in serving on the Marketing Committee should send this **Application Form**, along with a **cover letter** and any background (**resume or list of key accomplishments** – no more than two pages total) to demonstrate their active role in marketing, branding, public relations or digital media as it relates to tourism in San Luis Obispo County, to [Ashley@SLOCAL.com](mailto:Ashley@SLOCAL.com). For more information, contact Visit SLO CAL at (805) 541-8000.

# Lindsey Roberts, CHDM

lkhartig@gmail.com • (714) 882-9656  
www.linkedin.com/in/lhartig • San Luis Obispo, California

May 12, 2021

Dear Visit SLO CAL Board of Directors, Marketing Committee and Team,

I would like to re-apply for the position of Marketing Committee Member with Visit SLO CAL. I am a passionate marketing professional representing the lodging sector and would love the opportunity to continue to serve Visit SLO CAL's Marketing Committee.

In my role as Director of Marketing at Martin Resorts, I spearhead strategic marketing plans end-to-end across owned, paid and earned initiatives for five hotels to achieve revenue goals and increase market share. My experience has an emphasis on digital advertising, branding and social media marketing. Martin Resorts represents three different communities on the Central Coast; Pismo Beach, Paso Robles and Avila Beach. Representing three diverse communities, allows me to think about marketing for the County more broadly than just representing one community.

I've recently received my Certified Hospitality Digital Marketing Certification through HSMAI and am well versed on current marketing strategies and trends in the hospitality industry.

Having already served on the Visit SLO CAL Marketing Committee, I'm up to date on the goals, objectives, strategies and tactics of the organization and there will be no time lost on onboarding.

With my background and knowledge I believe I would continue to serve as an excellent Visit SLO CAL Marketing committee member.

My attached resume provides additional details about my responsibilities as it pertains to my experience. If I can provide any additional information or answer questions, please do not hesitate to reach out to me personally.

Thank you for your consideration and time.

Sincerely,

*Lindsey Roberts*

Lindsey Roberts



## VISIT SLO CAL MARKETING COMMITTEE APPLICATION FORM

NAME OF APPLICANT: Lynette Sonne  
COMPANY: FARMstead ED / SLO Co Farm Trail  
ADDRESS: 5989 Mustard Creek Rd., Paso Robles, CA 93446  
PHONE: (805) 226-2081 EMAIL: info@farmsteaded.com  
TOTAL YEARS IN HOSPITALITY INDUSTRY: 7  
TOURISM-RELATED MARKETING EXPERIENCE:

Founder of FARMstead ED / SLO Co Farm Trail

### Employment History

CURRENT EMPLOYER: Lynette Sonne Consulting Inc. YRS OF SERVICE: 20  
TITLE: President  
PAST EMPLOYER: Craig Realty Group YRS OF SERVICE: 3  
TITLE: Tenant Coordinator / Project Manager / Partner

### Community/Board Involvement

ORGANIZATION: California Women for Agriculture TITLE: Fundraising Event Chair  
DATES OF INVOLVEMENT: 2009-2017 Chair. Current member.  
ORGANIZATION: SLO Co Sheriff's Posse TITLE: 2nd Lt. Training Officer  
DATES OF INVOLVEMENT: 2004-2014  
ORGANIZATION: SLO Co Cattlewomen TITLE: member  
DATES OF INVOLVEMENT: 2017-present

Individuals interested in serving on the Marketing Committee should send this **Application Form**, along with a **cover letter** and any background (**resume or list of key accomplishments** – no more than two pages total) to demonstrate their active role in marketing, branding, public relations or digital media as it relates to tourism in San Luis Obispo County, to [Ashley@SLOCAL.com](mailto:Ashley@SLOCAL.com). For more information, contact Visit SLO CAL at (805) 541-8000.



## Visit SLO CAL MARKETING COMMITTEE APPLICATION FORM

NAME OF APPLICANT: Leann Standish  
COMPANY: San Luis Obispo Museum of Art  
ADDRESS: 1010 Broad Street  
PHONE: 805.543.8562 EMAIL: lstandish@sloma.org  
TOTAL YEARS IN HOSPITALITY INDUSTRY: 27  
TOURISM-RELATED MARKETING EXPERIENCE:

I have overseen Visitor Service and Marketing and PR programs for Museums throughout

### Employment History

CURRENT EMPLOYER: San Luis Obispo Museum of Art YRS OF SERVICE: 7 mos  
TITLE: Executive Director  
PAST EMPLOYER: Foundation for the Performing Arts Center YRS OF SERVICE: 4  
TITLE: Executive Director

### Community/Board Involvement

ORGANIZATION: SLO Chamber TITLE: Membership committee  
DATES OF INVOLVEMENT: Spring 2019 - Spring 2020  
ORGANIZATION: SLO Chamber TITLE: Economic Dev Comm  
DATES OF INVOLVEMENT: Spring 2018- Spring 2019  
ORGANIZATION: Girls Going Greater TITLE: Board Member  
DATES OF INVOLVEMENT: Spring 2018 - Spring 2019

Individuals interested in serving on the Marketing Committee should send this **Application Form**, along with a **cover letter** and any background (**resume or list of key accomplishments** – no more than two pages total) to demonstrate their active role in marketing, branding, public relations or digital media as it relates to tourism in San Luis Obispo County, to [Ashley@SLOCAL.com](mailto:Ashley@SLOCAL.com). For more information, contact Visit SLO CAL at (805) 541-8000.

May 24, 2021

Visit SLO CAL

To Whom It May Concern:

Please accept this letter as my formal request to be considered for Visit SLO CAL's Marketing Committee. Committee member Kathleen Naughton shared this information with me and suggested it may be beneficial for me to participate.

I have been a resident of the Central Coast since the fall of 2016, however my love of this region started in the 90's when I lived and worked in Fresno. During that time I served as the Deputy Director of the Fresno Metropolitan Museum of Art, History and Science.

My career since that time has taken me all across the United States serving in leadership roles for major museums including, the Oregon Museum of Science and Industry, the Indianapolis Museum of Art, Minneapolis Institute of Arts and the Perez Art Museum Miami.

Consistently throughout my career marketing and communications has been a primary focus of my work. In Indianapolis, my team launched a wildly successful brand identity campaign "It's My Art" which resulted in significant increases in attendance. In Minneapolis, my group launched the "please don't lick the art" campaign which resulted in a drop in the average age of Museum attendees by more than 6 years.

In October I accepted the role as Executive Director of the San Luis Obispo Museum of Art, which is experiencing a significant and necessary renaissance. The Museum will be host to internationally significant artists over the next two years as we seek to redefine the Museum's role in the region.

I reside in Arroyo Grande, work in San Luis Obispo and enjoy the most exquisite commute up Highway 1 every day.

It would be my honor to serve as a member of the your marketing committee, thank you for your consideration.

Regards,

Leann Standish

---

**Glenn Burdette**

1150 Palm Street  
San Luis Obispo, California 93401  
805-544-1441

**Erin Nagle, CPA**

Principal  
Erin.Nagle@glennburdette.com

**Professional Services Proposal  
for  
Visit SLO CAL**

June 7, 2021

**We do things  
differently**

We are not your typical CPA firm. By going beyond the norm, we help you prosper today while strengthening your plans for tomorrow.

Tax, Audit and Advisory Public Accounting Services. Serving the Central Coast since 1965.



**GLENN BURDETTE**

## TABLE OF CONTENTS

	<b><u>Page</u></b>
Firm Overview	3
Service Region	4
Services	5-6
Go Beyond	7
Be the Best	8
Qualifications & Quality	9
Proposed Services	10
Audit Approach	10-13
Tax Services	13
Agreed-Upon Procedures Approach	14
Team Qualifications	15-16
References	17
Fees	18
Peer Review Report	19



## FIRM OVERVIEW

Glenn Burdette, Certified Public Accountants, is a local firm with offices in San Luis Obispo, Paso Robles, and Santa Maria. The Firm was established by Fred L. Glenn in 1965, so we have over 50 years of experience on the Central Coast. Our team is over 70 people strong, comprised of CPAs, professional staff, and administrative assistants and support staff. Biographies of the associates who will be working with you are contained under the Staff Biographies and Experience section.

We believe Glenn Burdette is uniquely qualified to serve your organization. There are a number of sound reasons why you should select us as your independent certified public accountants:

- We are a large regional CPA firm that prides itself in taking a different approach to servicing our clients.
- Our mission is to Go Beyond to provide our clients with creative, innovative and forward thinking tax and accounting services.
- We are reachable and approachable, and respond immediately to your financial questions or concerns.
- Our approach to tax, auditing and consulting services is management oriented. We concentrate on maintaining a close and constructive relationship with our clients throughout the year.
- Our Firm has a continuity of personnel from year-to-year, to assure the most efficient services.
- We are a service organization. We understand the obligation we have on a continuing basis, to earn your patronage through responsible service and on-going attention to your needs.
- We have vast experience in key industries, including wine, not-for-profit and manufacturing, thereby we are familiar with those aspects of your business.
- With specialization in key industries we have compiled meaningful benchmarks and metrics for analysis and comparison to help your business succeed.



## SERVICE REGION

Glenn Burdette maintains three fully-staffed offices in Paso Robles, San Luis Obispo and Santa Maria so that we may be accessible to our clients. We are regionally focused on the California Central Coast, spanning the geography between the King City Bridges south to the Gaviota Tunnel, west of I-5.

In 1965, Fred Glenn opened the doors of what would eventually become Glenn Burdette. The current San Luis Obispo office was erected in 1985 and has been our main office since. The Paso Robles office was opened in 1994 and the Santa Maria office in 2009.

### Office Locations:

#### SAN LUIS OBISPO

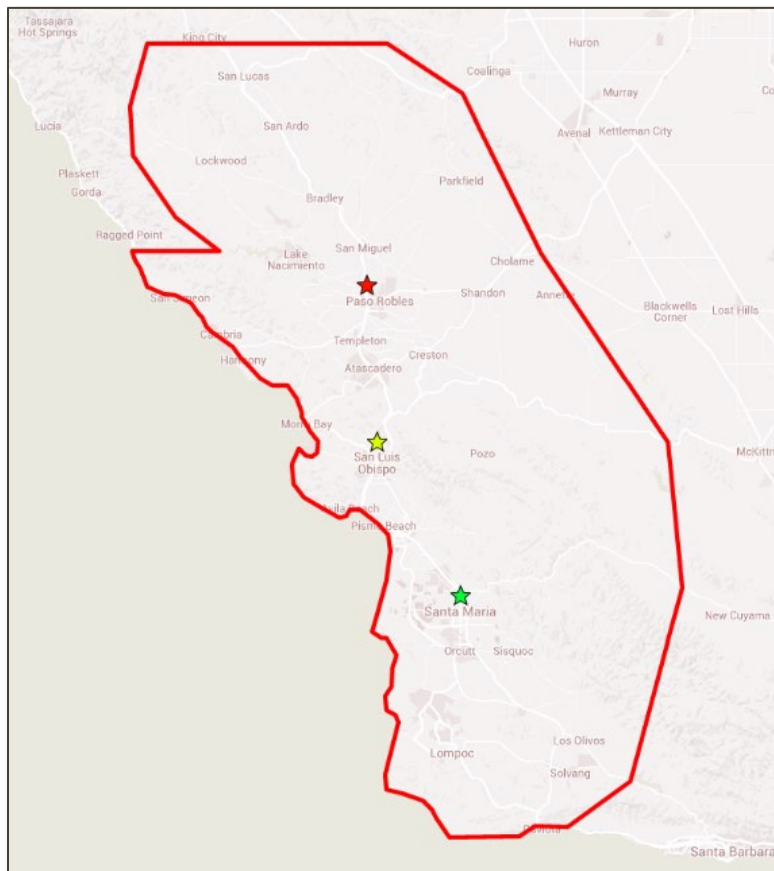
1150 Palm Street  
San Luis Obispo, CA 93401  
p 805.544.1441  
f 805.544.4351

#### PASO ROBLES

102 S. Vine Street, Suite A  
Paso Robles, CA 93446  
p 805.237.3995  
f 805.239.9332

#### SANTA MARIA

2222 S. Broadway, Suite A  
Santa Maria, CA 93454  
p 805.922.4010  
f 805.922.4286



## SERVICES

The Firm has the largest tax and audit departments in San Luis Obispo County. We are heavily involved in all phases of tax planning, preparation and consulting. We can assist you with a wide array of tax related issues including payroll taxes and employee benefit plans. We also maintain a client accounting services department. We are available to present educational seminars and employee training programs throughout the year. For example, Glenn Burdette hosts a complimentary bookkeeper education series for select Glenn Burdette clients.

### Taxation

- Income Tax Compliance
- Income Tax Planning & Strategy
- IRS Representation
- Sales & Use Tax Compliance and Audit Support
- Business Property Tax
- Multi-State & International Taxation
- Entity Formation & Structure/Restructure

### Audit & Attestation

- Financial Statement Audit, Review & Compilation
- Yellow Book and Single Audits
- Limited Scope 401k Audit
- Loan Covenant Agreed Upon Procedures
- Internal Controls
- Inventory Agreed Upon Procedures

### Consulting & Advisory

- Business Succession Planning
- Buy-Sell Planning
- Retirement & Estate Planning
- Business Planning & Forecasting
- Buy-Side Consulting
- Sell-Side Consulting
- Business Management Consulting
- Credit & Collection Services
- Litigation Support
- Expert Witness Services
- Trust Administration Services
- Court Accountings

### Outsourced Operations

- Controllershship & CFO
- Bookkeeping
- Payroll & Compensation
- Inventory Cost Accounting
- Fixed Asset Accounting
- Accounting Candidate Screening
- Accounting System Planning & Support
- Internal Review & Management
- Recommendations
- ESOP Planning & Implementation

Glenn Burdette is a full service CPA firm. In addition to offering compliance and accounting services, we are also available to provide various business advisory services. These include outsourced Controller and CFO services, as well as many other Consulting services. We are able to perform a review of your internal accounting department and systems providing a customized analysis of your company as well as resolution recommendations. Additionally, Glenn Burdette's Estate, Gift and Trust team is available to assist with estate planning as well as succession planning and implementation.

## SERVICES (cont.)

### Controllershship & CFO Services

Financial Statement Preparation/Analysis	General Ledger Account Reconciliation Review
Budgeting/Forecasting	Documentation of Policies & Procedures
Cash Flow Modeling	Internal Control Recommendations
Monthly Fluctuation Analysis	Financial Metrics
Management/Board of Directors Reporting	Chart of Accounts Structure
Business Strategy & Planning	Account Reconciliation
Operational Expense Analysis	Compliance Reporting
“What-If” Scenario Modeling	Month End Close Process Improvement
Periodic On-Site Business Visits	Accounting Candidate Screening
Vendor Management/Correspondence	Payroll & Compensation Analysis

The above list is not meant to be all-inclusive. We are happy to discuss your specific business needs with you and develop solutions that are a fit for you.

## GO BEYOND

At the heart of Glenn Burdette is our Go Beyond culture. Each day we make a personal commitment to go beyond - build deeper relationships, provide innovative solutions, work collaboratively as a team, serve our community and be active stewards for the future of Glenn Burdette.

**Commitment to Service.** Accounting is often called a numbers business, but we view it as a service business. We are deeply committed to serving our clients, who are responsible for our success; our employees, who are the heart and soul of our firm; and our community, where we make our homes, raise our families and participate in activities that enrich our lives.

**Dedication to Clients.** Our goal is to go above and beyond for our clients, creatively applying our expertise and experience to meet their individual needs. We help them seize opportunities today and offer solutions for their challenges ahead. We serve a diverse base of large, middle-market and small owner-managed businesses in a wide range of industries, and we are also proud to serve a number of nonprofit organizations, governmental agencies and individuals.

**Loyalty to Employees.** We foster an environment where hard work and client service are rewarded. In 2000, Glenn Burdette became the first CPA firm in California to become employee owned, developing an authentic investment in the professional development and personal success of our team. We believe that happy employees make the most satisfied clients.

**Involvement in Community.** Community service is integral to the culture of Glenn Burdette. Our employees serve on local nonprofit boards and are active in chambers of commerce and service clubs from Santa Maria to Paso Robles. Following are just some of the organizations that our firm and employees support with their time and resources:



## BEING THE BEST

One of our Firm's proudest accomplishments is being ranked as one of the Best Places to Work in the Tri-Counties of the Central Coast (Ventura, Santa Barbara and San Luis Obispo). We proudly share this honor with you because we believe it is a reflection of how we conduct ourselves on an ongoing basis.

Adding to this honor, we are also rated as the Best CPA Firm in San Luis Obispo.

We are strong believers in the philosophy that happy employees do a better job. By cultivating a work environment that garners high levels of job satisfaction and retention, our team is naturally more engaged, we provide a higher level of service to our clients, and we are more productive. Our team members are excited and honored to work with the clients we have and have a strong commitment to our clients and each other.

Simply put, we love what we do and where we do it.



## QUALIFICATIONS & QUALITY

We subscribe to all current pronouncements of the Financial Accounting Standards Board and the Governmental Accounting Standards Board. As such, we have access to the AICPA technical hotline, CalCPA technical hotline, and FASB technical staff when questions arise related to accounting or disclosure during the course of the engagement. Staff assigned to the engagement would continue to obtain relevant continuing professional education and all new staff will be subject to our hiring standards. This will help to ensure the quality of staff over the term of the contract.

### **License to Practice in California**

The Firm and all assigned management and supervisory professional associates are properly licensed to practice as Certified Public Accountants in California.

### **Peer Review Report Letter**

Our Firm had its quality control system reviewed in September 2020 as required by the American Institute of Certified Public Accountants. A copy of the opinion can be found at the back of this proposal.

### **BDO Alliance**

Glenn Burdette is a member of the BDO Alliance. The BDO Alliance USA is a nationwide association of independently owned local and regional accounting, consulting and service firms with similar client service goals. The BDO Alliance USA presents an opportunity for these firms, by accessing the resources of BDO USA, LLP and other Alliance members, to expand services to their clients without jeopardizing their existing relationships or their autonomy. The BDO Alliance USA was developed to provide member firms with an alternative strategy for gaining competitive advantage in the face of a changing business landscape. The Alliance represents an opportunity for BDO to enhance relationships with reputable firms that share a mutual business understanding. The BDO Alliance USA is a subsidiary of BDO USA, LLP, a Delaware limited liability partnership.

### **Insurance**

The Firm is properly insured against fraud, errors and omissions. The Firm maintains Professional Liability and Commercial General Liability Insurance as well as Workers Compensation and Commercial Automobile Liability Insurance.



## **PROPOSED SERVICES**

### **Audit Services**

We will audit the statement of financial position, statement of activities, statement of changes in net assets, statement of functional expenses and statement of cash flows of the San Luis Obispo County Visitors and Conference Bureau as of and for the year ended June 30, 2021 in accordance with auditing standards generally accepted in the United States of America as set forth by the American Institute of Certified Public Accountants (AICPA).

The audit shall be performed for the purpose of expressing an opinion on the financial statement of the Organization taken as a whole, and it is anticipated that independent auditors will encounter no scope limitations.

We will schedule fieldwork on dates that are mutually acceptable with the Accountant. Prior to fieldwork, we will provide a detailed schedule of requests that we will require for the audit, including support for each balance sheet account. We have been a paperless firm for a number of years. We will note in our schedule of requests that we would prefer to have electronic schedules, where possible, including Word and Excel, if available and PDF.

Our audit approach will be designed to provide for the most effective and efficient use of resources. We will review the basic accounting systems of the Organization and will use questionnaires and checklists to document our understanding of the internal control system including the control environment, risk assessment, control activities, information and communication, and monitoring. This will be supplemented by narratives of our understanding of the flow of information through the accounting system. We will interview various Organization staff in order obtain an understanding of the design of the relevant controls and whether they have been placed in operation, and we will assess control risk.

Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. (Tests of controls are required only if control risk is assessed below the maximum level.) Our tests, if performed, will be less in scope that would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed. We anticipate performing tests of controls for purchasing/cash disbursements, personnel/payroll, and revenue/cash receipts transaction cycles. Based on the controls present within the respective systems and our preliminary evaluation of such controls, a determination will be made as to the extent of compliance testing procedures to be performed. The Organization's budgeting, accounting and reporting system will be reviewed for compliance with the legally adopted budget and amendments.



In planning and performing our audit, we will consider the internal control sufficient to plan the audit in order to determine the nature, timing, and extent of our auditing procedures for the purpose of expressing our opinions on the Organization's financial statements and on their compliance with requirements applicable to major programs.

During our year-end work, we will perform substantive tests of account balances including vouching to supporting documentation or confirmation with outside parties as determined appropriate. We will apply analytical procedures by comparing account balances for the current year to the prior year amounts and the current year budget in order to identify unusual or unexpected balances or relationships and in order to consider risks when preparing audit work programs. Analytical procedures will also be applied to significant revenues and expenditures as a portion of our substantive audit program.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts. We will request written representations from your attorneys as part of the engagement. At the conclusion of our audit, we will also require certain written representation from the Accountant about the financial statements and related matters.

Management is responsible for making all financial records and related information available to us. Your staff involvement will consist of providing access to or copies of internal schedules, typing confirmations, pulling supporting documentation such as vendor invoices and payroll records and performing other clerical assistance as needed during our engagement. We understand that you will provide us with such information required for our audit and that you are responsible for the accuracy and completeness of that information.

Proposed adjusting journal entries will be discussed in detail with the Accountant prior to preparation of any reports. The final form of the audited financial statements together with the auditors' reports will be discussed with the Executive Director. Reports are only issued after complete concurrence with report format and wording. This approach to audit services results in the early identification of problems and leads to a harmonious, professional relationship.

We will advise you about appropriate accounting principles and their application and will assist in the preparation of your financial statements, but the responsibility for the financial statements remains with each entity. That responsibility includes the establishment and maintenance of adequate records and effective internal control over financial reporting, the selection and application of accounting principles, and the safeguarding of assets. Management is responsible for the basic financial statements and all accompanying information, including related notes, as well as all representations contained therein.

We will furnish the Organization with five (5) bound copies (or another mutually agreed upon number) and one electronic copy of the final audit reports.

In addition, we will conduct an audit exit conference with management at the completion of the audit and before the issuance of the final report. The purpose of the exit conference will be to discuss findings, conclusions, and opinions which are to be stated in the audit reports. We will also attend a Board meeting, remotely, for a formal presentation of the audit reports to the Board at no additional charge in order that the audit might be fully understood and any questions answered.

As part of our audit, we will advise you of opportunities we have observed for efficiency or improved controls in the Organization's internal control system, procedures, and management practices. All matters are discussed with management and the significant suggestions are included in the findings and recommendations section of the audit report. If any of the matters are considered material weaknesses or significant deficiencies as defined by the AICPA, they would be indicated in our report related to internal controls and compliance. We will provide a separate management letter which will explain in greater detail the findings and recommendations noted in the audit report, if necessary. The management letter will be addressed to the Organization's Board and will include a statement of audit findings and recommendations affecting the financial statements, internal control, accounting, accounting systems, legality of actions, other instances of noncompliance with laws and regulations, and any other material matters.

Identifying and ensuring that the Organization comply with laws, regulations, contracts, and agreements, including grant agreements, is the responsibility of management. As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of compliance with applicable laws and regulations and the provisions of contracts and agreements, including grant agreements, if any. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion.

The management of the Organization is responsible for establishing and maintaining internal control. In fulfilling this responsibility, estimates and judgments by management are required to assess the expected benefits and related costs of the controls. The objectives of internal control are to provide management with reasonable, but not absolute, assurance that assets are safeguarded against loss from unauthorized use or disposition, that transactions are executed in accordance with management's authorizations and recorded properly to permit the preparation of financial statements in accordance with generally accepted accounting principles, and that federal award programs are managed in compliance with applicable laws and regulations and the provisions of contracts and grant agreements.

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be

examined and the areas to be tested. We will plan and perform the audit to obtain reasonable rather than absolute assurance about whether the financial statements are free of material misstatement, whether caused by error or fraud. Because of the concept of reasonable assurance and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us. In addition, an audit is not designed to detect errors, fraud, or other illegal acts that are immaterial to the financial statements. However, we will inform the Organization of any material errors and any fraud that comes to our attention. We will also inform the Organization of any other illegal acts that come to our attention, unless clearly inconsequential. Our responsibility as auditors is limited to the period covered by our audit and does not extend to matters that might arise during any later period for which we are not engaged as auditors.

We will assure ourselves that the Organization are informed of each of the following, if applicable: the auditors' responsibility under generally accepted auditing standards, significant accounting policies, management judgments and accounting estimates, significant accounting audit adjustments, other information in documents containing audited financial statements, disagreements with management if any, management consultation with other accountants, major issues discussed with management prior to retention and difficulties encountered in performing the audit.

We will retain all workpapers generated under this contract for at least five years. The workpapers for this engagement are the property of Glenn Burdette and constitute confidential information. However, we may be requested to make certain workpapers available to authorized representatives of any and all regulatory agencies with jurisdiction over any of the operations of the Organization pursuant to authority given by law or regulation including the State Controller's Office. If requested, access to such workpapers will be provided under the supervision of Glenn Burdette personnel. Furthermore, upon request, we may provide photocopies of selected workpapers to the regulatory agencies and they may intend or decide to distribute the photocopies or information contained therein to others, including other governmental agencies.

We will work together with management to schedule a time that is agreeable to perform all audit testwork to meet submission deadlines.

### **Tax Services**

We have expertise in IRS Form 990 and tax planning and compliance for tax-exempt organizations. We are available to prepare the Organization's federal and state returns as well as provide consultation services, as needed. Our fee estimates for the preparation of the Organization's federal and state tax returns are contained under the Fees section.

## **Agreed-Upon Procedures**

To maintain our independence to perform auditing services and to provide the Organization assistance in providing periodic reviews of internal controls and checks and balances surrounding the cash receipts, cash disbursements, and payroll processes, we propose to perform the following agreed-upon procedures and provide a report describing the results. These procedures can be modified or updated by management or the Board at any time.

Following is a complete listing of the required scope of internal controls to be performed by the independent accountant. We will perform the following duties each month or quarter and let you know if any discrepancies arise.

The independent accountant should ensure that the internal controls are in place for the entities general ledger. For all internal control categories, we propose to perform the minimum agreed-upon procedures set forth below.

1. Review bank reconciliations, including all check signatures, voided checks and accounts payable payments, including but not limited to checks, wire, debit card, or electronic funds transfer.
2. Test methods and controls for compliance with procedures over cash disbursements by randomly selecting 15 cash disbursements and agree to supporting documentation. If performed on a quarterly basis, we would select 25 cash disbursements.
3. Test methods and controls for compliance with procedures over cash receipts by randomly selecting 15 cash receipts and agree to supporting documentation. If performed on a quarterly basis, we would select 25 cash receipts.
4. Select three journal entries or other month-end adjustments to agree to supporting documentation.

## **TEAM QUALIFICATIONS**

The overall responsibility for the proposed services would be with Erin Nagle, CPA, Principal. Erin will be assisted by Katie Olson, CPA, Senior Associate. Also available for consultation is Tim Dossa, CPA, Senior Consulting Manager. A short biography of our professional staff that would be involved follows.

### ***Erin M. Nagle, Certified Public Accountant (License #75111) – Audit Principal***

Ms. Nagle graduated from the University of California at Santa Barbara in June 1995. She was employed as an auditor at BDO Seidman LLP in San Francisco for three years where she worked on public and private companies in retail and manufacturing as well as large non-profits. Ms. Nagle joined our firm in June 1998 and has worked extensively with attest clients in the governmental and nonprofit industries, as well as those in the winery and construction fields. Ms. Nagle is responsible for the education and quality control of the audit department and is a graduate of the Emerging Leaders Academy for CPA's. She is a member of the American Institute of Certified Public Accountants and the California Society of Certified Public Accountants.

Ms. Nagle has served in a supervisory capacity in the following relevant governmental and nonprofit engagements:

- San Luis Obispo Housing Trust Fund
- Restorative Partners
- San Luis Coastal Education Foundation
- Camp Ocean Pines
- Santa Maria Humane Society
- Central Coast Water Authority
- Cities of San Luis Obispo and Lompoc
- University Corporation at Monterey Bay
- Foundation of CSU, Monterey Bay
- California Polytechnic State University Foundation

### ***Katie Olson, Certified Public Accountant (License #130484) – Senior Audit Associate***

Ms. Olson graduated from California Polytechnic State University, San Luis Obispo in June 2014 with a Bachelor of Science degree in Business Administration. She was employed as an intern at Glenn Burdette during her senior year. After graduation she joined a boutique public accounting firm in San Francisco, where she worked as a tax and audit professional associate before returning to Glenn Burdette as an audit professional in July 2016. Ms. Olson is a member of the American Institute of Certified Public Accountants and the California Society of Certified Public Accountants.

Since joining the firm, Ms. Olson has served on the following relevant nonprofit clients:

San Luis Obispo County Housing Trust  
Land Conservancy of San Luis Obispo County  
Women's Shelter Program of San Luis Obispo County  
Bay Foundation of Morro Bay  
Family Care Network, Inc.  
Transitions Mental Health Association, Inc.

***Mical W. Bovee, Certified Public Accountant (License #101900) – Tax Principal***

Mr. Bovee graduated from California Polytechnic State University, San Luis Obispo, and joined Glenn Burdette in August 2005. Mr. Bovee specializes in tax planning and compliance in various areas, including tax-exempt organizations, trusts and estates, hospitality, real estate and international tax matters. He is a member of the American Institute of Certified Public Accountants and the California Society of Certified Public Accountants. Mr. Bovee serves on the Board of the Community Action Partnership of San Luis Obispo County.

***Chris S. Delaney, Certified Public Accountant (License #106144) – Tax Senior Manager, Serving as Tax Preparer***

Mr. Delaney graduated from Liberty University in Lynchburg, Virginia in October of 2007. He joined Glenn Burdette in August of 2007. Mr. Delaney specializes in tax planning and compliance in various areas, including tax-exempt organizations, personal income taxes, hospitality, and real estate. He is a member of the American Institute of Certified Public Accountants and the California Society of Certified Public Accountants. Mr. Delaney serves as Treasurer on the Board of the Central Coast Children's Choir and as a Member on the Measure D Citizens' Oversight Committee for San Luis Coastal Unified School District.

## **SIMILAR ENGAGEMENTS AND REFERENCES**

We perform services for many non-profits in San Luis Obispo County. A partial list with references is below.

<b>Name of Agency</b>	<b>Contact Person</b>
Housing Trust Fund of San Luis Obispo County	Tom Sherman (805) 543-5970
Family Care Network	Bobbie Boyer (805) 781-3535
Land Conservancy of San Luis Obispo County	Kaila Dettman (805) 544-9096
Stand Strong	David Fields (805) 781-6401
Restorative Partners	Sister Theresa Harpin (805) 242-1272
Camp Ocean Pines	Andrew Boyd-Goodrich (805) 927-0254
Transitions-Mental Health Association	Raven Lopez (805) 540-6525
Cal Poly Corporation	Dan Banfield (805) 756-7335
Bay Foundation of Morro Bay	Lexie Bell (805) 772-3834
Long Term Care Ombudsman of San Luis Obispo County	Karen Jones (805) 785-0132
Food Bank Coalition of San Luis Obispo County	Garret Olson (805) 238-4664

## **FEES**

Our fees for the audit and 990 tax return for the year ended June 30, 2021 will be based on actual time spent at our standard hourly rates. Our audit fee is estimated to be \$12,000 and our tax fee is estimated to be \$3,000, which includes a 10% discount for the Organization's nonprofit status.

Our fees for the monthly or quarterly agreed-upon procedures will be based on actual time spent at our standard hourly rates. Our agreed-upon procedures fee is as follows and can be provided on an either monthly or quarterly basis.

Monthly	\$	1,250
Quarterly	\$	2,500

Should we ever anticipate cost overruns, we would stop work and discuss with Visit SLO CAL management before proceeding. This will eliminate "surprise" billings.

### **Standard Billing Rates**

Principals	\$ 385/hour	Administrative Associates	\$ 95/hour
Senior Managers	290/hour	Support Associates	85/hour
Managers	265/hour	Human Resources Consulting	265/hour
Supervisors	220/hour	Credit & Collection Services	265/hour
Senior Professional Associates	175/hour	Litigation Testimony	450/hour
Professional Associates	140/hour	Litigation Support	400/hour
Entry Level Professionals	120/hour		

### **Other Matters**

We understand there may be times when you will need technical assistance for other matters outside of the projects listed above. We will bill separately for time spent on these matters which will be billed at our standard hourly rates.



---

Report on the Firm's System of Quality Control

September 21, 2020

To the shareholders of Glenn Burdette Attest Corporation  
and the Peer Review Committee of the California Society of CPAs

We have reviewed the system of quality control for the accounting and auditing practice of Glenn Burdette Attest Corporation (the firm) in effect for the year ended May 31, 2020. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the standards may be found at [www.aicpa.org/prsummary](http://www.aicpa.org/prsummary). The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

**Firm's Responsibility**

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

**Peer Reviewer's Responsibility**

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

**Required Selections and Considerations**

Engagements selected for review included an engagement performed under Government Auditing Standards, including a compliance audit under the Single Audit Act and audits of employee benefit plans.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

**Opinion**

In our opinion, the system of quality control for the accounting and auditing practice of Glenn Burdette Attest Corporation in effect for the year ended May 31, 2020, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Glenn Burdette Attest Corporation has received a peer review rating of *pass*.

*Watson Coon Ryan, LLC*

Greenwood Village, Colorado



May 25, 2021

Dear Chair Gibson and First 5 Commissioners,

Please accept this letter of support on behalf of Visit SLO CAL for the proposed partnership between First 5 SLO County and the SLO Chamber of Commerce that would provide resources, education and support to enable businesses throughout San Luis Obispo County to become more family friendly.

Visit SLO CAL is the countywide destination marketing and management organization for San Luis Obispo County, and are active in not only marketing the destination to potential visitors, but also in advocating for some of the region's biggest and most pressing needs impacting travel and tourism and resident quality of life.

Increasing family friendly policies in our industry businesses is essential to employee satisfaction and retention, increasing economic benefits, and helping grow diversity, equity and inclusion in the workforce, as well as in our community as a whole. Even prior to the COVID-19 pandemic, childcare resources were extremely limited or unaffordable for the majority of the workforce throughout SLO County. Families often go without finding sustainable childcare before parents go need to go back to work. When care isn't available, it is disproportionately women, particularly BIPOC women, who are forced to drop out of the workforce to provide unpaid care.

Employees in the travel and tourism industry face additional challenges to finding affordable and accessible childcare because employees often work nontraditional workdays and hours. Childcare facilities that are only open for traditional Monday through Friday, 8am-5pm hours do not provide the flexibility needed for employees in our industry. Additionally, unaffordable and limited childcare options do not allow people of all income levels the ability to find adequate childcare for their families.

This partnership will support our industry's recovery from the pandemic and bring more people into the workforce. The travel and tourism industry has been disparately impacted by the COVID-19 pandemic. As we move towards recovery efforts to help support this industry, childcare resources are vital to ensuring equitable opportunities for all job seekers and future employees.

We support the work proposed in this partnership and look forward to being involved in industry specific outreach and support.

All the best,

Chuck Davison, CDME  
President & CEO, Visit SLO CAL



BUSINESS &  
MARKETING PLAN

FY 2022

DRAFT







Letter from the President & CEO.....	3
Strategic Direction 2023.....	4
Aligning the Vision.....	5
Business & Marketing Objectives.....	6
Strategic & Industry Partners.....	8
Destination Partners.....	10
Key Moments FY 2021.....	11
Data Insights & Trends.....	12
SLO CAL Brand Refresh.....	18
SLO CAL House of Brands.....	29
Target Audience.....	34
Geographic Prioritization.....	36
Paid Media.....	38
Owned Media.....	46
Earned Media & Public Relations.....	48
Partnerships & Events.....	52
Sales.....	55
Film SLO CAL.....	58
Experience SLO CAL 2050.....	60
Equity, Diversity & Inclusion.....	64
Advocacy.....	66
Engage with Visit SLO CAL.....	68
Future Items for Consideration.....	74

## LETTER FROM THE PRESIDENT & CEO

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

On January 14, 2020, when the Board of Supervisors approved the renewal of the Tourism Marketing District for an additional 10-year term, we never could have imagined the challenging times just months ahead. Nor could we have imagined those challenges lasting as long as they have. As an organization and industry, we had major plans post-renewal to advance tourism's impact in SLO CAL, both by increasing off-peak visitation and continuing to lead the destination's management strategy to maintain and improve resident quality of life, while creating ambassadors for our region through new visitation. Like much in 2020, those plans changed quickly, and without the ability to market to a closed world, our efforts shifted to supporting our industry in new and unique ways. I am extremely proud of our organization's work over the past year, but I'm also ready to return to the implementation of the pre-pandemic plans we created together.

One of the silver linings over this past year has been SLO CAL's tourism performance against our competitive set of Santa Barbara, Monterey, Napa and Sonoma. In almost every way, our destination has outperformed our counterparts. Lower COVID-19 case counts and hospitalization rates, open and safe preparedness, occupancy, Average Daily Rate (ADR), Revenue per Available Room (RevPAR), visitation, air service enplanement and deplanement rates and pace of recovery all performed better in SLO CAL than in those other markets during the pandemic period. Those results, and our deep cost-cutting measures in March 2020 prior to the shutdown, have put us one step ahead of our competitors in returning our tourism communities to pre-pandemic levels.

As we embark on FY 2022, we have built our most strategic business and marketing plan to date. We have worked diligently to align organizational Objectives and Key Results (OKRs) with those of departments and team members to ensure we are channeling and prioritizing our work to achieve optimal results. We hired the gold standard in California tourism marketing—Mering—as our Agency of Record (AOR). You may be familiar with Mering's work as Visit California's AOR for the last 20+ years. Mering is tasked with building out our House of Brands strategy and the next evolution of our brand campaign set to launch this fall. We've hired one of the sharpest minds in destination marketing with the addition of Cathy Cartier as our Chief Marketing Officer. Cathy led one of the largest, most strategic and well-known tourism destinations in the United States, and now she has brought her talent to SLO CAL to help us deliver on our promises. We have added capacity with team members when it made sense and have said no when it didn't. We have aligned our strategies with the dollars conserved during the pandemic in preparation for the launch of our most robust advertising and marketing initiatives to date.

This year is promising to be better than the last, but that's not our measurement of success. We have great things in store for FY 2022, and have outlined many of them in the pages ahead. We are excited to partner with you in bringing these plans to life!

Together we can,



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



# STRATEGIC DIRECTION 2023



## 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 life long 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



## IMPERATIVES

- > **ENHANCE OUR ORGANIZATIONAL CAPACITY AND CULTURE**
- > **AMPLIFY AND STEWARD THE SLO CAL BRAND THROUGH UNIFIED EFFORTS**
- > **LEAD THE COUNTY TOURISM INDUSTRY IN A COLLABORATIVE RESILIENCE PLANNING EFFORT**
- > **DEMONSTRATE VALUE TO INVESTORS, PARTNERS, STAKEHOLDERS AND COMMUNITIES**

To read the complete Strategic Direction 2023 plan, visit [SLOCAL.com/about-us](https://SLOCAL.com/about-us).

Visit SLO CAL (VSC) is a team of destination marketing professionals who work with, and on behalf of, its investors, partners, stakeholders and community to promote SLO CAL® (San Luis Obispo County, California) to both domestic and international visitors. As the countywide nonprofit destination marketing and management organization (DMMO) for SLO CAL, VSC's goal is to collaborate with partners to build the SLO CAL brand through a data-driven, efficient and dynamic marketing and sales program while simultaneously enhancing the resident quality of life. Built on research with a strategy of continuous improvement, VSC aims to establish SLO CAL as a favorite West Coast destination known for its signature slower pace of life and unique mix of incredible, immersive guest experiences.

# ALIGNING THE VISION

Strategic Direction 2023 serves as Visit SLO CAL's north star. The Operational Plan and Experience SLO CAL 2050, the organization's destination management strategy, work to inform the annual Business & Marketing Plan, which outlines the annual program of work for each department. VSC internally tracks the progress of projects, and the Objectives and Key Results (OKRs) of each department and team member, all of which align with the overarching organizational OKRs. The impact of this work is most vividly seen through increased destination awareness that drives the organization's economic impact.



# BUSINESS & MARKETING OBJECTIVES

**For FY 2022, Visit SLO CAL has defined four overarching organizational objectives aligned with each of the four Strategic Direction 2023 imperatives, along with measurable key results for each objective. The Objectives and Key Results of each department ladder up to these four strategic objectives.**



## **IMPERATIVE 1 OBJECTIVE:**

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

### **KEY RESULTS**

- Fill open positions by December 31, 2021
  - Public Relations Manager
  - Director of Marketing
  - Finance/HR Manager
  - Assistant to the President & CEO
  - Marketing Coordinator
- Achieve quarterly employee Net Promoter Score (eNPS) of 60 or higher
- Ensure 90% of candidates state they had a professional, well-organized recruitment experience, even if Visit SLO CAL does not extend an offer or hire them
- Ensure 100% of new hires state their onboarding experience was good or great
- Ensure 100% of team members score and reestablish their key results within three weeks of each quarter ending



## **IMPERATIVE 2 OBJECTIVE:**

**Activate a House of Brands strategy that creates a pathway for community adoption and increased visitation to and within the county**

### **KEY RESULTS**

- Achieve adoption of Phases 1-3 of House of Brands strategy by all local destination partners by June 30, 2022
- Complete visitor profile study and personas by December 1, 2021
- Complete Equity, Diversity and Inclusion Audience and Asset Alignment Study by October 1, 2021
- Identify key assessment metrics quarterly in order to evaluate, monitor and pivot.

DRAFT





### **IMPERATIVE 3 OBJECTIVE:** **Implement recovery and resiliency planning initiatives**

#### **KEY RESULTS**

- Achieve 60 new partner registrations for SLO CAL Crafted by December 31, 2021, and 20 registrations per quarter, beginning Q2
- Launch Events & Festivals Strategy by April 30, 2022
- Launch Customer Service Training Initiative by May 31, 2022
- Develop pathway, toolkit and engagement opportunities for unified advocacy voice by February 28, 2022
- Develop and launch Xplorit virtual site inspection program by December 1, 2021



### **IMPERATIVE 4 OBJECTIVE:** **Increase engagement with investors, partners, stakeholders and communities**

#### **KEY RESULTS**

- Onboard 96 new partners by June 30, 2022
- Achieve average engagement of 2+ actions for all partners monthly
- Increase Net Promoter Score (NPS) to 40 as defined by biannual survey (2020 = NPS 27)
- Set a resident sentiment benchmark of 75% satisfaction by June 30, 2022
- Achieve score of 75% or higher (by June 30, 2022) on resident approval of Visit SLO CAL's efforts to maintain or improve resident quality of life

# STRATEGIC & INDUSTRY PARTNERS

**Visit SLO CAL believes that a resilient destination is fundamental to destination management and the region's success. VSC is part of a dynamic ecosystem with industry and business partners, key community-based organizations and government stakeholders that collaboratively identify critical issues and promote policies designed to improve resident quality of life and the visitor experience. FY 2022 efforts focus on initiatives outlined in Experience SLO CAL 2050 and identifying other pathways that are integral to building and maintaining a resilient SLO CAL.**

## STRATEGIES

---

- Engage in local working groups, community boards and conversations to understand community issues and strengthen impact through sustained partnerships and a shared focus on economic vibrancy
- Provide educational and engagement opportunities for investors, partners and stakeholders for travel and tourism related issues and conversations
- Partner with stakeholders and local agencies to collaborate on and advocate for issues surrounding resident quality of life, visitor attraction and opportunities for economic development
- Engage as an essential partner and leader as policies are developed and decisions are made about the future of the region
- Evaluate resident sentiment for tourism in SLO CAL

## OBJECTIVES

---

- Create a unified effort with strategic partners to explore issues around building a resilient SLO CAL
- Strengthen Visit SLO CAL's impact on the community through civic engagement opportunities
- Position Visit SLO CAL as a community leader and a voice for our countywide travel and tourism industry
- Amplify successes and initiatives to our community at large to demonstrate the integral value of the local travel and tourism industry

## KEY RESULTS

- Complete board-approved Experience SLO CAL 2050 recommendations by June 30, 2022
- Meet quarterly with six strategic partners to advance shared initiatives surrounding economic development and resident quality of life
- Meet quarterly with three community-based organizations to discuss shared values and initiatives and explore areas for collaboration
- Meet quarterly with key community stakeholders to discuss issues surrounding the local travel and tourism industry, and shared objectives to increase recovery and resiliency efforts
- Serve on key boards or committees, and engage in planning efforts for projects impacting community development and resilience efforts
- Host two educational workshops for investors and partners by June 30, 2022
- Achieve score of 75% or higher (by June 30, 2022) on resident approval of Visit SLO CAL's efforts to maintain or improve resident quality of life

## RESILIENT DESTINATION



# DESTINATION PARTNERS

Representing the voice of the larger community, Visit SLO CAL partners with organizations on a state and national level to foster the greatest impact for local destination partners and tourism businesses. VSC reviews the broad array of opportunities offered, strategically identifying the initiatives that will create the strongest return on investment, and cascades those down to local communities. Having a seat at the table allows Visit SLO CAL to leverage opportunities in larger advocacy, marketing and sales initiatives while maximizing human and financial capital.



# KEY MOMENTS FY 2021



In July 2020, when the industry needed it most, Visit SLO CAL worked with Miles Partnership to launch a \$1.7 million media campaign aimed at increasing visitation from California drive markets and market share. With a rolling launch, SEM was introduced in July as part of VSC's always-on tactics, followed by Social in August and the bulk of Display in September.



In January 2021, after the landslide at Rat Creek led to the abrupt closure of Highway 1, the Visit SLO CAL team quickly reactivated its Highway 1 closure crisis plan, including content and navigation resources on SLOCAL.com. Creating a consistent communication message, VSC distributed laminated one-sheets with navigation information and detour routes to lodging investors and visitor centers. VSC also engaged with SLO CAL's state representatives to advocate for the efficient and safe reopening of Highway 1.



In February 2021, a contract agreement was reached with Mering Holdings to serve as Visit SLO CAL's Agency of Record. Mering, which also represents destination organizations such as Visit California, will be responsible for the execution of VSC's FY 2022 creative and production services, media plan and the evolution of the SLO CAL brand.



In April 2021, as a result of Visit SLO CAL's advocacy efforts, an agreement was reached with county officials to offer COVID-19 vaccine appointment times reserved solely for lodging employees. Those appointment times were later extended to employees of wineries, breweries, distilleries and attractions.



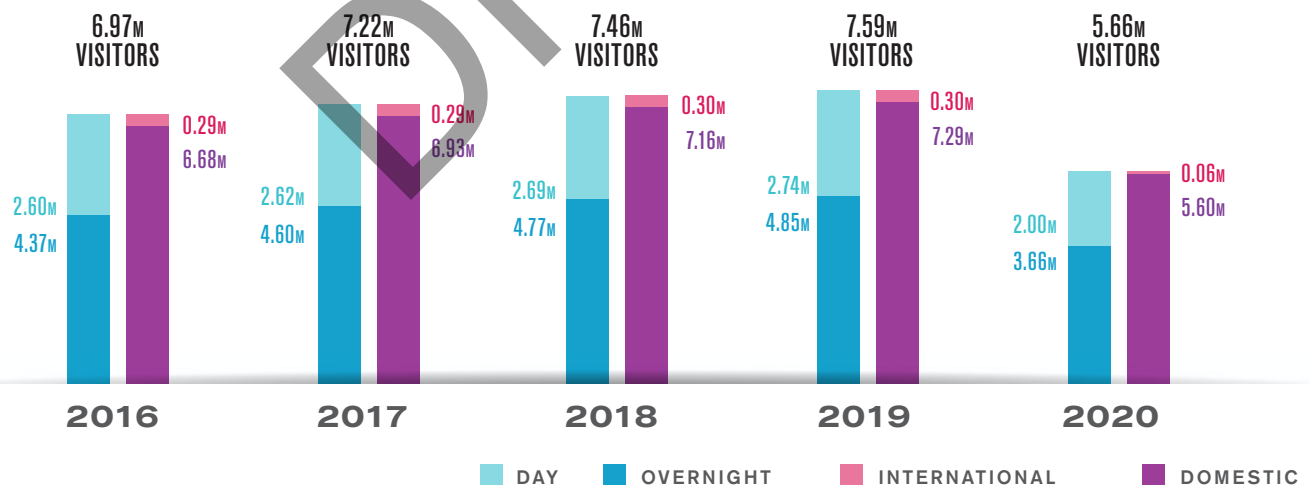
In March 2021, Visit SLO CAL hired Cathy Cartier as Chief Marketing Consultant to lead the marketing vision, strategy and brand evolution for the organization. Her tenure as a full-time team member and status as VSC's Chief Marketing Officer became effective June 1, 2021.

# DATA INSIGHTS & TRENDS

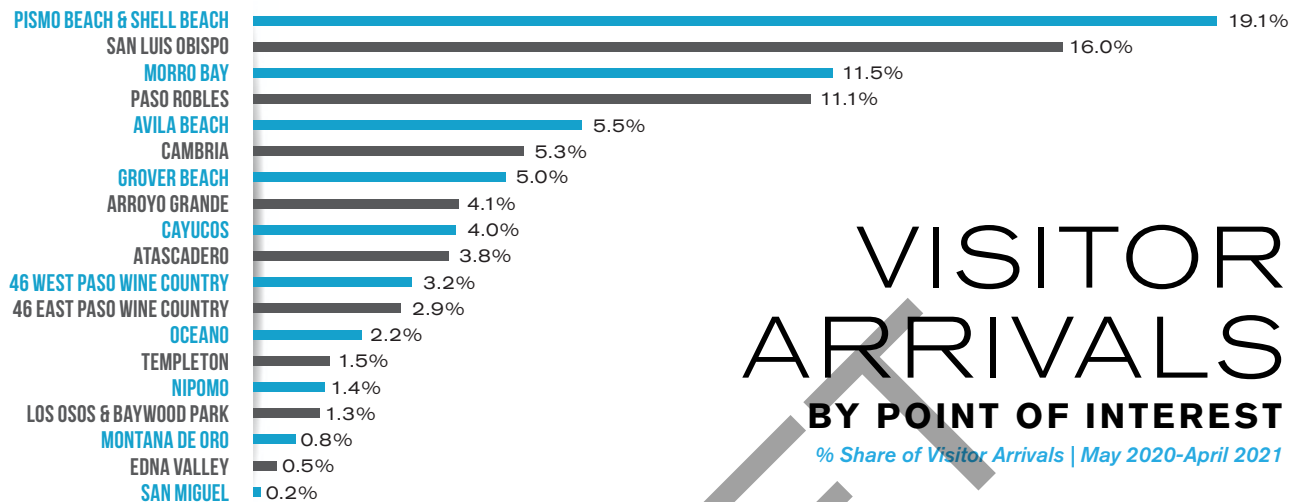
While the SLO CAL lodging community was severely impacted by the COVID-19 pandemic, the county demonstrated its resiliency and has outperformed competitive destinations in its recovery, offering a promising outlook for FY 2022. VSC has partnered with its agencies to identify trends and develop a strategic response to ensure the recovery continues.

## DATA INSIGHTS

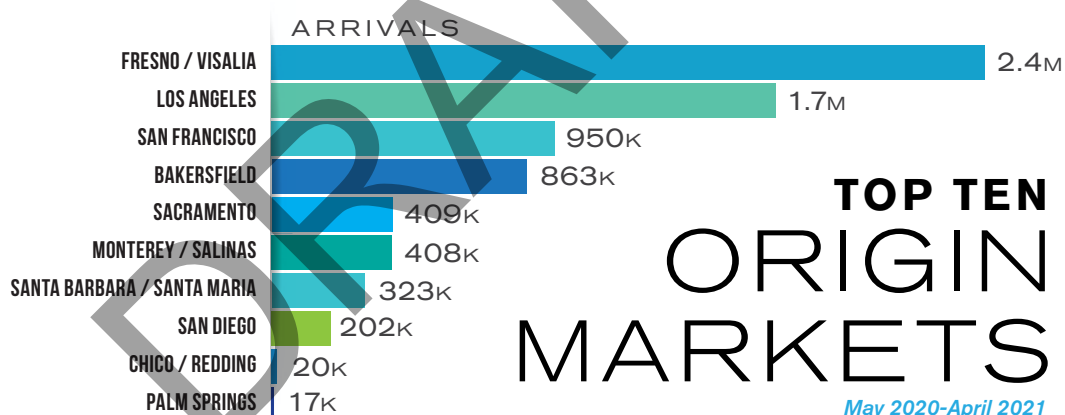
With an organizational initiative to “innovate in the development of data resources for our tourism industry,” Visit SLO CAL understands the value of collecting, analyzing and sharing the latest data insights with the tourism industry.



Source: Tourism Economics



Source: Arrivalist



Source: Arrivalist

## CROSS-VISITATION

1.82 ↑ 4.6%  
YOY

COMMUNITIES PER UNIQUE ARRIVAL

May 2020-April 2021

1.35 ↑ 7.5%  
YOY

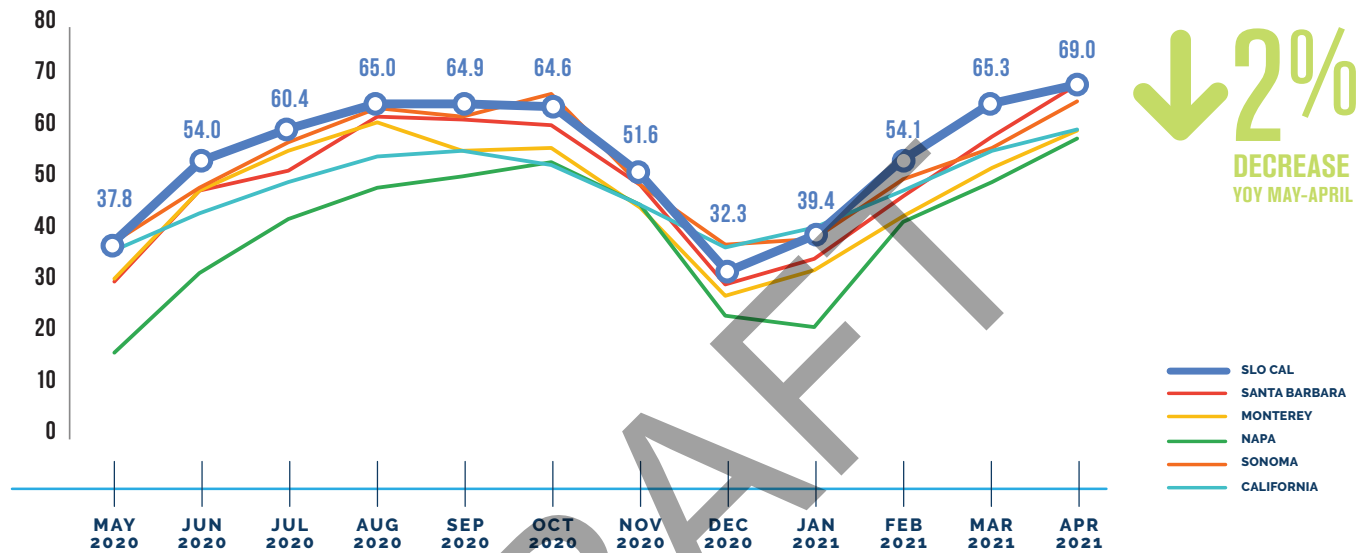
DAYS

May 2020-April 2021

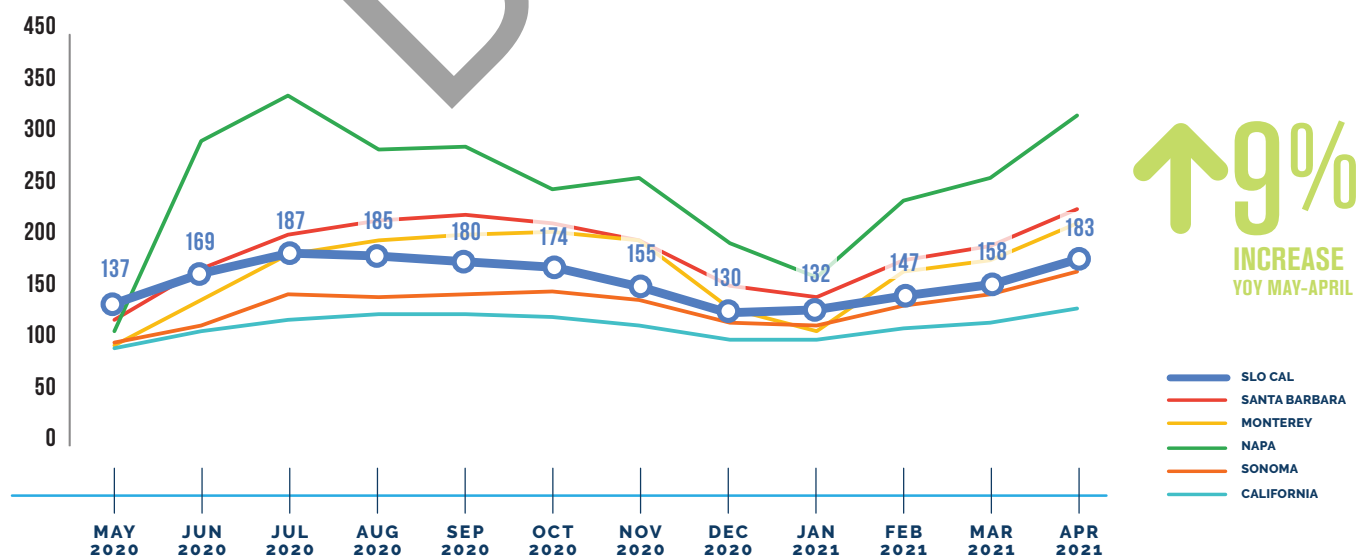


# DATA INSIGHTS & TRENDS (CONTINUED)

## HOTEL OCCUPANCY (OCC)



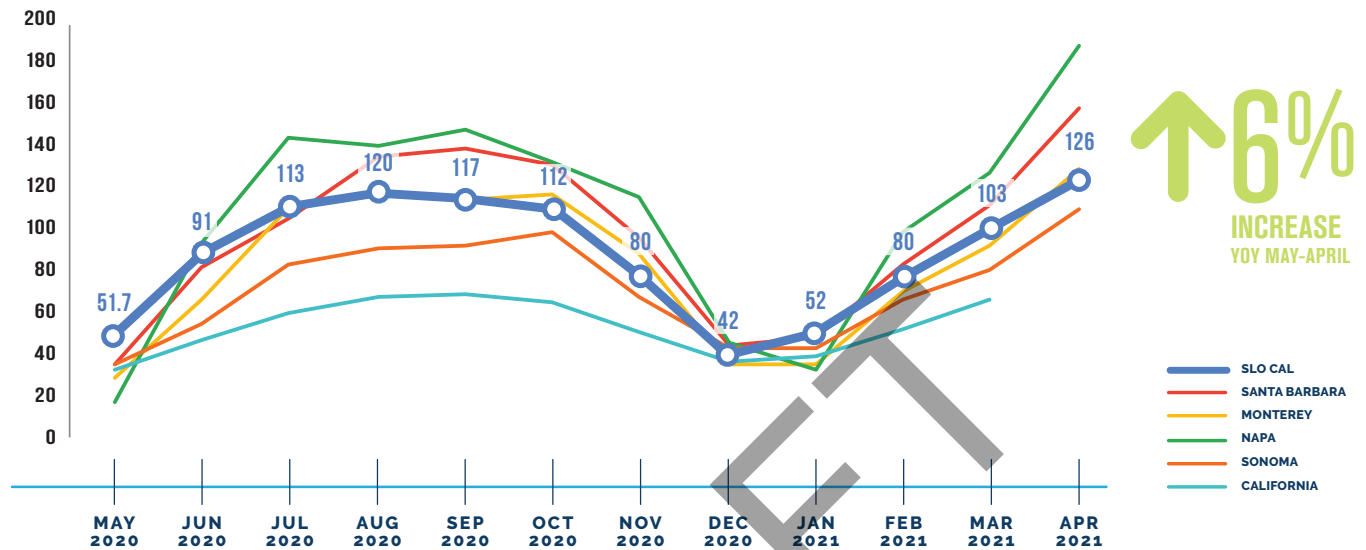
## AVERAGE DAILY RATE (ADR)



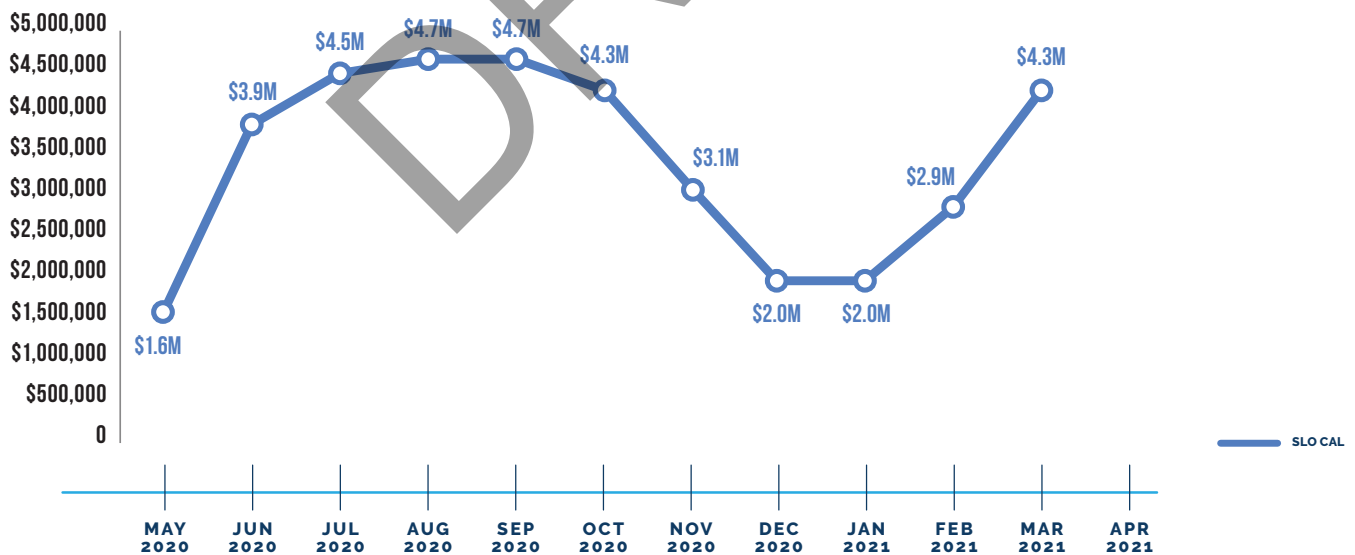
Sources: STR, Inc., Visit SLO CAL



## REVENUE PER AVAILABLE ROOM (REVPAR)



## TRANSIENT OCCUPANCY TAX (TOT)



Sources: STR, Inc., Visit SLO CAL

# WHY TOURISM MATTERS



## TRAVEL spending

\$1.19B

\$3.3M  
a day

\$136k  
an hour

\$2.3k  
a minute

\$38  
a second



## INDUSTRY earnings

\$661M

## TOURISM PUTS



10,450

PEOPLE TO WORK EACH DAY

## DIRECT SPENDING BY SECTOR

LODGING



\$411M

FOOD SERVICE



\$310M

RETAIL



\$150M

RECREATION



\$120M



## TOURISM CONTRIBUTES



\$35.9M

15.6%  
YOY DECREASE

IN TRANSIENT OCCUPANCY TAX REVENUE

WITHOUT TOURISTS  
EACH SLO CAL HOUSEHOLD  
WOULD NEED TO SPEND  
AN ADDITIONAL **\$11,121**

TO CREATE THE SAME ECONOMIC BENEFIT  
for the community

## TRAVEL SPENDING CREATED

\$66M

IN LOCAL  
TAX REVENUE

which could cover the expenses for



**614** POLICE OFFICERS'  
SALARIES

OR



**760** FIREFIGHTERS'  
SALARIES

OR



**1,401** TEACHERS'  
SALARIES

OR



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

WITHOUT STATE & LOCAL TAX REVENUE  
GENERATED BY TRAVEL & TOURISM

EACH SLO CAL HOUSEHOLD WOULD



PAY AN ADDITIONAL

**\$1,113** in taxes

# TOURISM TRENDS

## WELLNESS

---

After learning the art of self-care during lockdown, travelers are looking for places to improve their mental and physical health. Destressing, relaxation and self-healing are top motivators for wellness-related travel services, with being in nature and participating in outdoor activities recognized as strong prescriptions for well-being.

### **SLO CAL OPPORTUNITY**

SLO CAL has benefited through the pandemic as a place to get away, go off the grid and explore less crowded places. Visit SLO CAL will continue to capitalize on the region's many outdoor experiences that travelers desire on a wellness break.

## SLOW MOVEMENT

---

The Slow philosophy is not about doing everything at a snail's pace, but seeking to do everything at the right speed. Coming out of the pandemic, the realization of what is truly important in life is fueling a strong desire for living in an intentional and purposeful way—doing everything as well as possible, and thereby gaining more enjoyment from it.

### **SLO CAL OPPORTUNITY**

The SLO CAL brand is a reflection of the Slow Movement. Visit SLO CAL will continue to embrace this core truth, while adding new depth and dimension to the idea of SLO CAL living and what it offers travelers.

## MEANINGFUL TRAVEL

---

In alignment with the Slow Movement, travelers are taking a more purposeful, deliberate and considered approach to travel, choosing to visit fewer places and get more out of each place visited. Travelers are slowing down and savoring experiences, and they expect to have deeper connections with local life, communities, traditions and artisans.

### **SLO CAL OPPORTUNITY**

Visit SLO CAL will capitalize on this thoughtful approach to travel, promoting meaningful connections with people, culture, nature and the opportunity to savor SLO CAL Crafted® experiences.

## THE NEW GOOD LIFE

---

The definition of what it means to live a good, happy, fulfilled life is changing. Today's version of the good life has shifted from a focus on money, status and consumption to the pursuit of a simpler, balanced life, rich with connections to people, community and environment.

### **SLO CAL OPPORTUNITY**

The SLO CAL lifestyle engenders the new good life and is a ripe opportunity to innovate and create experiences that genuinely help travelers enjoy the simple pleasures inherent to the region's way of living and realize their new definition of the good life.

## SUSTAINABLE TRAVEL

---

Sustainable travel is no longer a trend, but a lifestyle. As citizens become more responsible and accountable to their place in society and the environment, they are parlaying lifestyle choices into travel decisions, such as prioritizing spending on businesses with sustainable practices and ensuring the money they spend supports the local community.


### **SLO CAL OPPORTUNITY**

With Stewardship as a core value, Visit SLO CAL has already begun highlighting unique stories of sustainable businesses across channels and in earned media efforts to reach those interested in sustainable travel experiences.

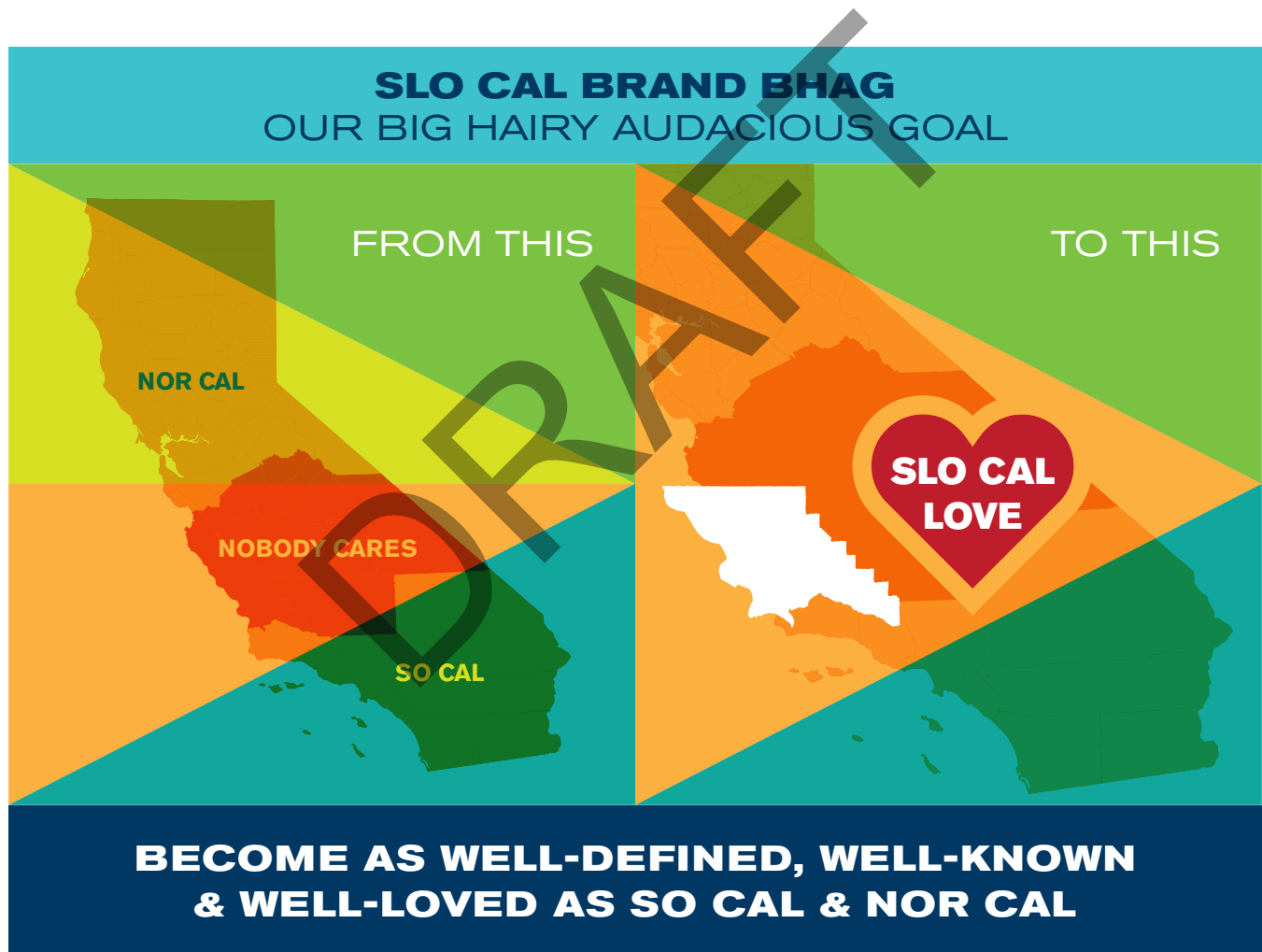
# SLO CAL BRAND *REFRESH*

DRAFT

To bring greater opportunity for collaboration, synergy and collective impact to the region's assessed lodging businesses and local destination partners, Visit SLO CAL will launch a brand refresh in fall 2021. This effort will evolve current SLO CAL brand positioning and messaging—adding more storytelling depth and dimension that aligns with consumer trends and better resonates with today's travelers, while establishing a unifying House of Brands approach.



With a distinct opportunity to increase the meaning and comprehension of SLO CAL, Visit SLO CAL has established a BHAG (big hairy audacious goal) for the next chapter of the SLO CAL brand—to become as well-defined, well-known and well-loved as Southern California and Northern California.





# *BRAND RESEARCH*

## **DATABASE SURVEY & STAKEHOLDER INTERVIEWS**



As a first step in the brand refresh, Visit SLO CAL conducted a quantitative survey to explore trip motivations and destination perceptions among past visitors from key California volume markets (Los Angeles, San Diego, San Francisco) and fly markets (Dallas, Denver, Las Vegas, Phoenix, Portland, Seattle).

# TRIP MOTIVATIONS

Travel is strongly driven by the type of occasion, or trip, and influenced by factors such as who is in the travel party, distance traveled and trip length. Of the four Ipsos trip motivations tested, SLO CAL visitors are largely motivated by Relationships and Enhanced Perspective (over Liberation or Harmony).

## RELATIONSHIPS

- Allows me to spend moments with my loved ones
- Allows me to strengthen relationships with those close to me

The pandemic enhanced our appreciation of family and friends. People desire to be together and prioritize making memories together. To SLO CAL visitors, the destination is seen as an ideal place to be in the moment and make meaningful connections, finding joy in the company of one another and creating new travel memories.

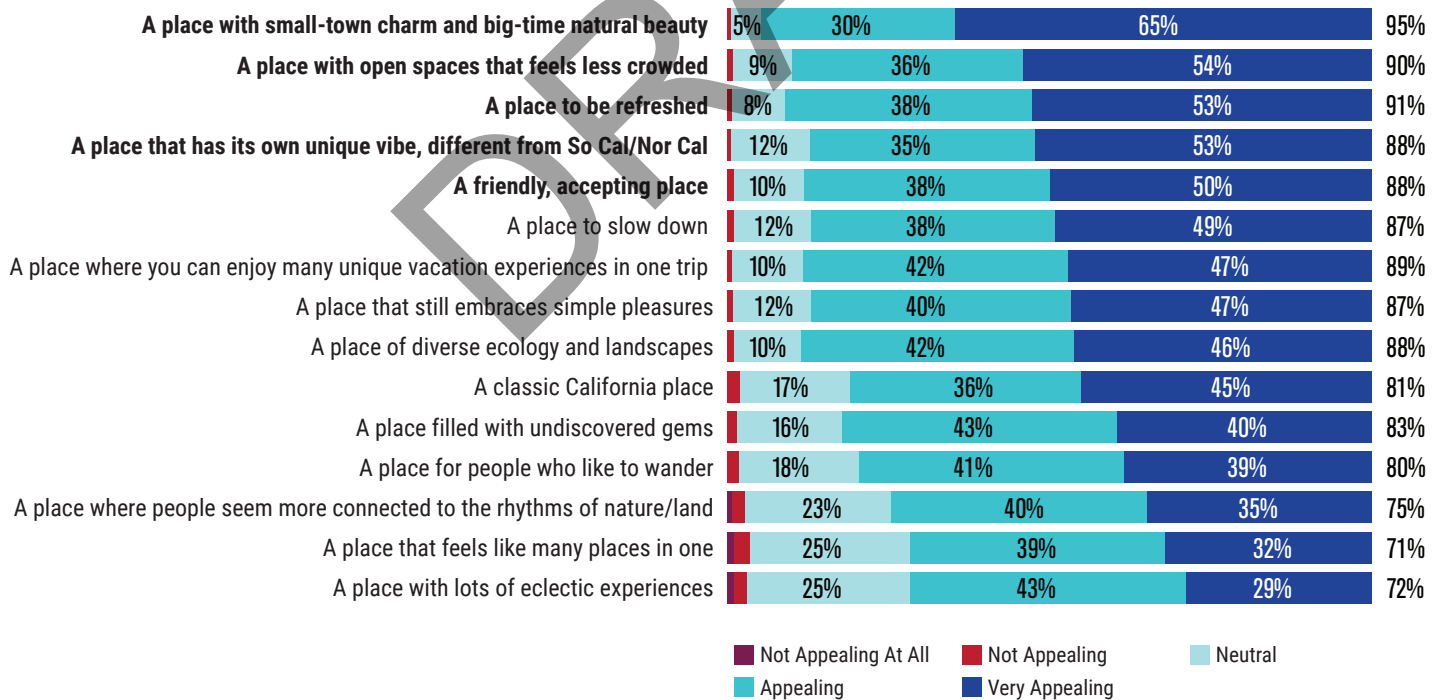
## ENHANCED PERSPECTIVE

- Provides me with unique and interesting experiences
- Broadens my knowledge and enriches my understanding of the world

Travelers want enriching experiences that will allow them to explore deeper connections with local life, learn about other cultures and traditions, and broaden their understanding through artisans and locals. The memories visitors have of SLO CAL are shaped by the people they meet and the unique and interesting experiences along the journey.

# DESTINATION PERCEPTIONS

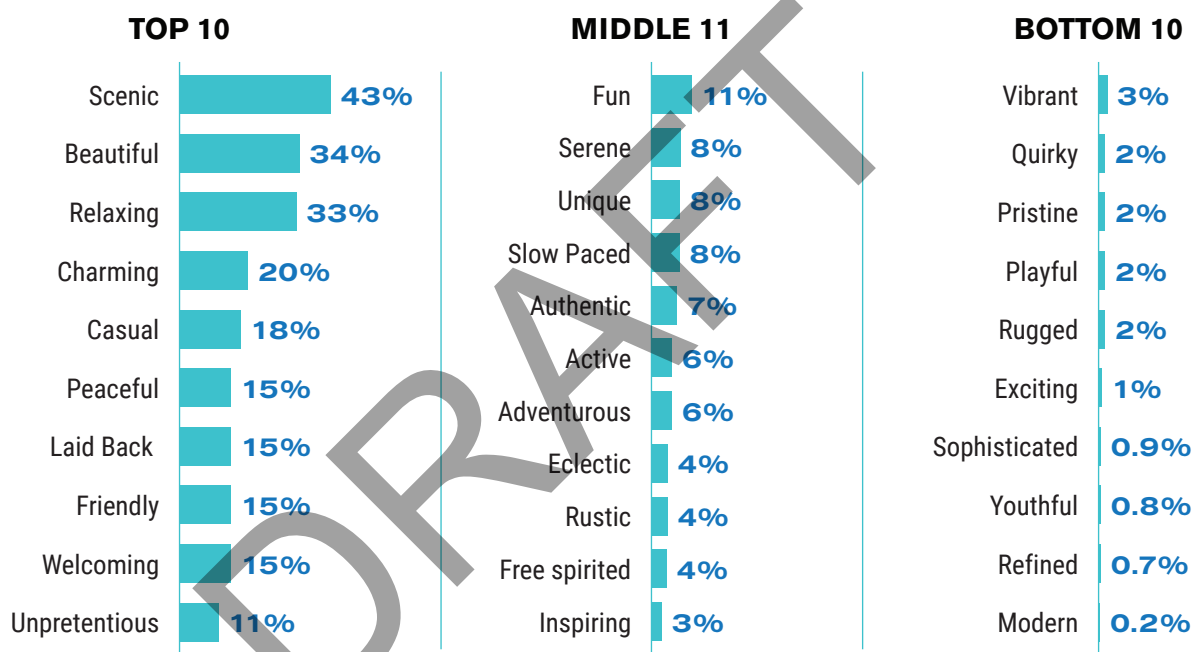
Survey respondents were asked to rate the appeal of statements that may describe SLO CAL's culture or vibe. Top-rated statements reflected the uniqueness of the destination in terms of geography, pace and people.



# DATABASE SURVEY & STAKEHOLDER INTERVIEWS (CONTINUED)

## DESTINATION ATTRIBUTES

Respondents were also asked to rank the top attributes or characteristics that best describe SLO CAL, with the Top 10 also reflecting geography, pace and people.



## STAKEHOLDER INTERVIEWS

To gather local perspectives about SLO CAL and individual destinations, interviews were conducted with key stakeholders across the region. Functional and emotional attributes described were in alignment with the quantitative findings, with important insight gleaned around the local people, or cultures, largely contributing to the region's character or vibe.





# BRAND RESEARCH

## QUALITATIVE FOCUS GROUPS

Four qualitative online focus groups were conducted with past visitors from San Francisco, Los Angeles, San Diego and a mix of out-of-state markets as follow-up to the quantitative survey. A blend of exploratory conversation and projective techniques was used to further uncover top-of-mind perceptions of SLO CAL and the region's lifestyle, while gauging reactions to a new brand refresh positioning statement and early messaging tenets for campaign development.

# QUALITATIVE FOCUS GROUPS (CONTINUED)

## TOP-OF-MIND PERCEPTIONS

Unaided top-of-mind perceptions focused on SLO CAL's beautiful natural setting and relaxing pace, which set it apart from other places.

Relaxing  
outdoors  
chill pretty  
peaceful  
Scenic  
adventurous  
fun Real CA  
Beautiful  
Majestic coastline  
Hills, sea, sun  
welcoming

"It's just very not super-fast paced. People are friendly. It's just a relaxing place to go so I think it's peaceful."

"It felt like a very special scenic place that you may not realize existed in California."

In terms of brand characteristics, aided responses were in alignment with the quantitative findings, with scenic, beautiful, relaxing and charming rising to the top.

## KEY THEMES

Throughout the groups, conversation around what makes SLO CAL unique can be distilled into three key themes.

### DIVERSITY OF NATURAL OFFERING

Hills, mountains, beaches, dunes, vineyards and valleys

### DELIBERATE, RELAXED PACE

A different pace and tempo are synonymous with the destination

### CULTURE CREATED BY GENUINE, REAL PEOPLE

Locals are critical to defining SLO CAL

# BRAND REFRESH POSITIONING

Participants were shown a SLO CAL positioning statement and asked to rate agreement on a 5-point scale, as well as highlight what most resonated. Across groups, the response was overwhelmingly positive with agreement the statement reflects SLO CAL, and "Life's Too Beautiful to Rush®" perfectly encapsulates the feel of the region. Other aspects of the statement that resonated included "life's tempo (being) a little more deliberate" and "a kaleidoscope of cultures all linked by one local spirit." The only negatives were around certain descriptors — "jagged" peaks, "lush" forests, which were seen as exaggerated versus the actual landscape.

Here in SLO CAL, life's tempo is a little more deliberate.  
Surrounded by abundant natural beauty, it's easy to see how  
the people here stay so grounded and generous of heart.

Rich, fertile fields and vine-draped hills. Jagged peaks and  
rugged coastal cliffs. Cool, lush forests that give way to  
golden dunes, warm sandy beaches and aquamarine waves.  
These surroundings are home to many unique towns and a  
kaleidoscope of cultures all linked by one local spirit. A warm,  
accepting ethos that makes it easy to connect with what  
matters to you.

And when you find yourself in this bountiful place—with  
friends, family, loved ones or simply solo—life becomes  
more vivid. Here, you don't just live in the now...you thrive,  
chill, laugh, play, sip, ride and thrill in the now.

Because in SLO CAL, Life's Too Beautiful to Rush®.

Discussion around a series of early messaging tenets, designed to help inform creative and content development, provided valuable insight to brand tonality and voice. Further refinement of the brand positioning will be undertaken based on research conducted.

"It sums up perfectly."

"It's all a positive for  
me...when I see the  
vision from the words,  
it all works."

**4.6%**  
AVERAGE RATING



# BRAND REFRESH

## KEY LEARNING

Through the research, core truths of the SLO CAL experience were validated along with new understanding around the SLO CAL lifestyle and what it delivers for travelers. While the scenic beauty of the place, slower pace and friendly people are key brand attributes, the research brought insight around how these work together to create a unique benefit. Specifically, new dimension came to light around slow as a deliberate way of living—of living vividly, made possible by the combination of place, pace and people, which provides richer territory for brand storytelling than slow as an antidote to fast.

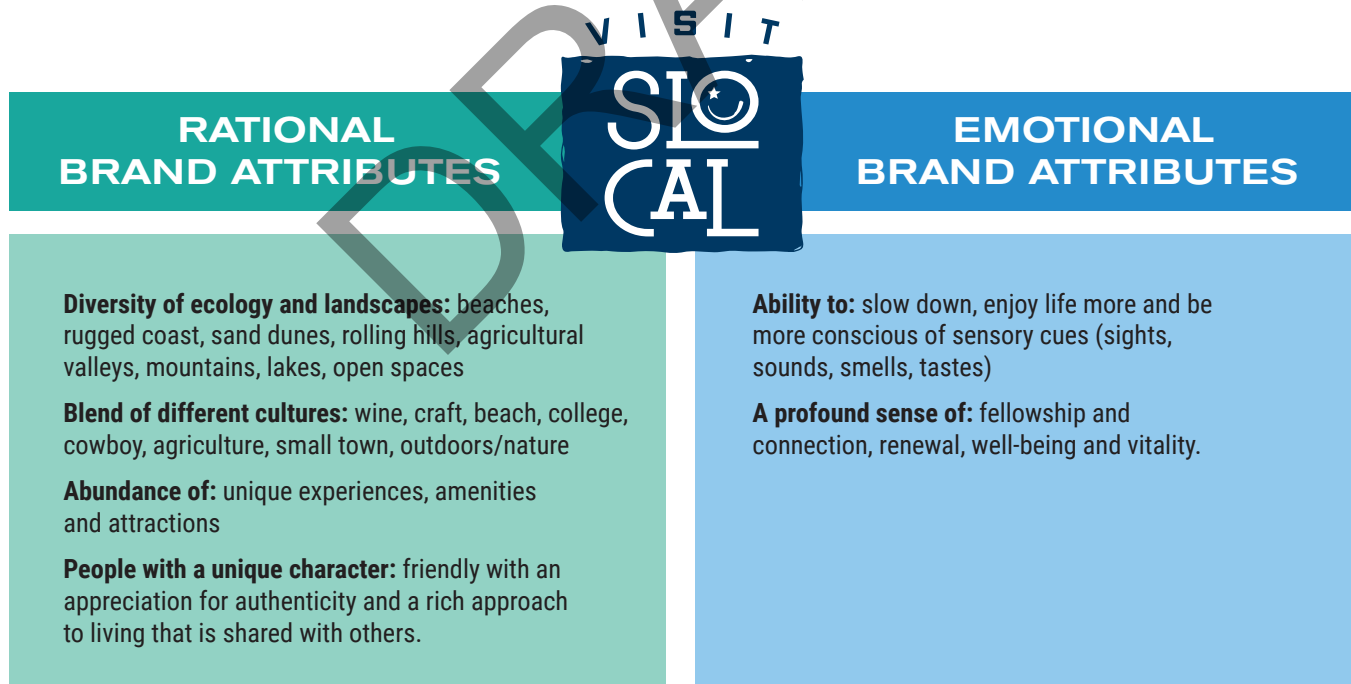
SLO CAL BRAND	
CURRENT	REFRESHED
Slow as an antidote to fast	Living vividly
Greater emphasis on place	Greater emphasis on people
Casual, friendly, unpretentious, playful	Genuine, warm, casual, charming, fun
Life's Too Beautiful to Rush®	Life's Too Beautiful to Rush®

# BRAND REFRESH STRATEGY

SLO CAL represents California of a simpler time—untouched, undeveloped and uncrowded, with an authentic, less complicated and more meaningful way of life. This key insight, combined with the region’s rational and emotional brand attributes, sets SLO CAL up to deliver perfectly on what travelers are looking for today.

The pandemic shifted focus back to basic human needs—health, belonging, care and love—while awakening people to what is truly important in life. The notion of living with intent and purpose has been amplified and permeated many aspects of life, including travel. Travelers are taking a thoughtful approach and seeking to savor experiences with family, friends and those they meet along the way.

When the core aspects of the SLO CAL brand are matched with consumer needs, the outcome offers one the chance to Live Vividly. This strategy will serve as the north star for the next chapter of the SLO CAL brand.

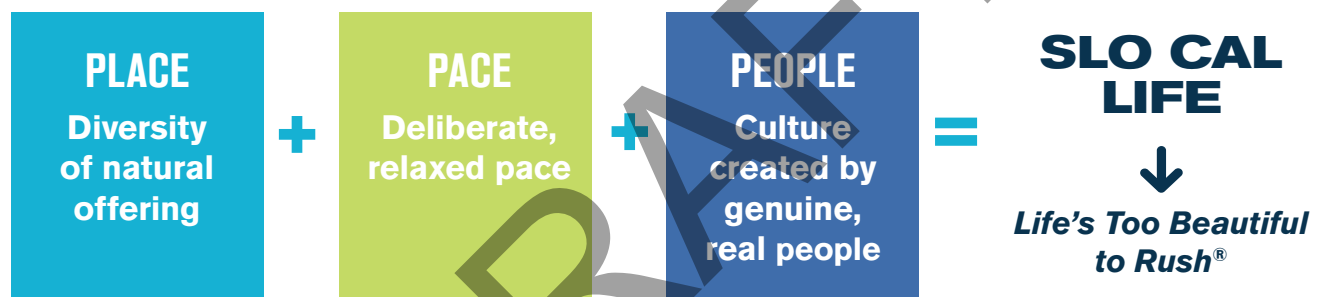


# STRATEGY (CONTINUED)

**SLO CAL OFFERS TRAVELERS THE OPPORTUNITY TO LIVE VIVIDLY.** It is a place that enables you to be fully present and see more clearly on every level: sensory, physically and emotionally. The benefit of living vividly is made possible by the blend of place, pace and people that make up SLO CAL life. This is the foundation of the SLO CAL brand and what will be reflected in the new campaign.

## BRAND STRATEGY

**Key Insight:** California of a simpler time



**Consumer Benefit/Messaging Strategy: Living Vividly;** where you can be fully present, see more clearly (sensory, physically and emotionally)

*"It felt like going from black and white to color...by slowing down I was able to take in the beauty of the beach, and the smell of the ocean...everything became more vivid."*

(Source Qualitative Online Focus Group, May 2021)

**Brand Character:** genuine, warm, casual, charming, fun





# SLO CAL HOUSE OF BRANDS

In pursuit of the SLO CAL brand “big hairy audacious goal” (BHAG) is the creation of a House of Brands approach that seeks to add greater definition and showcase individual destination partners while simultaneously unifying them under the SLO CAL brand. Visit SLO CAL is in development of a new brand campaign that will bring the promise of Living Vividly to life for consumers while providing a foundation of shareable assets for partners in FY 2022.

The House of Brands approach will be phased to allow destination buy-in at varying degrees and distribution of budgets across multiple years.

# PHASE 1

## HOUSE OF BRANDS

### CONNECTIVITY/RECIPROCITY

The SLO CAL brand is made up of a myriad of individual destination identities. Currently, SLO CAL as a master brand is not clearly connected to the individual brands and the individual brands are, for the most part, not clearly connected to the SLO CAL brand. To create a SLO CAL brand that stands out and is more easily understood by potential travelers, greater connectivity and reciprocity are needed between the SLO CAL brand and the individual destinations.

#### OBJECTIVES

---

- Adoption of SLO CAL brand identification (logo lock-up and/or identifying line) on individual destination partner websites and in all advertising to signify the destination is part of the SLO CAL brand family
- Implementation of cross linking/handoffs back to SLOCAL.com from individual destination websites
- Development of complementary SEO/SEM strategies across SLO CAL and individual destination websites

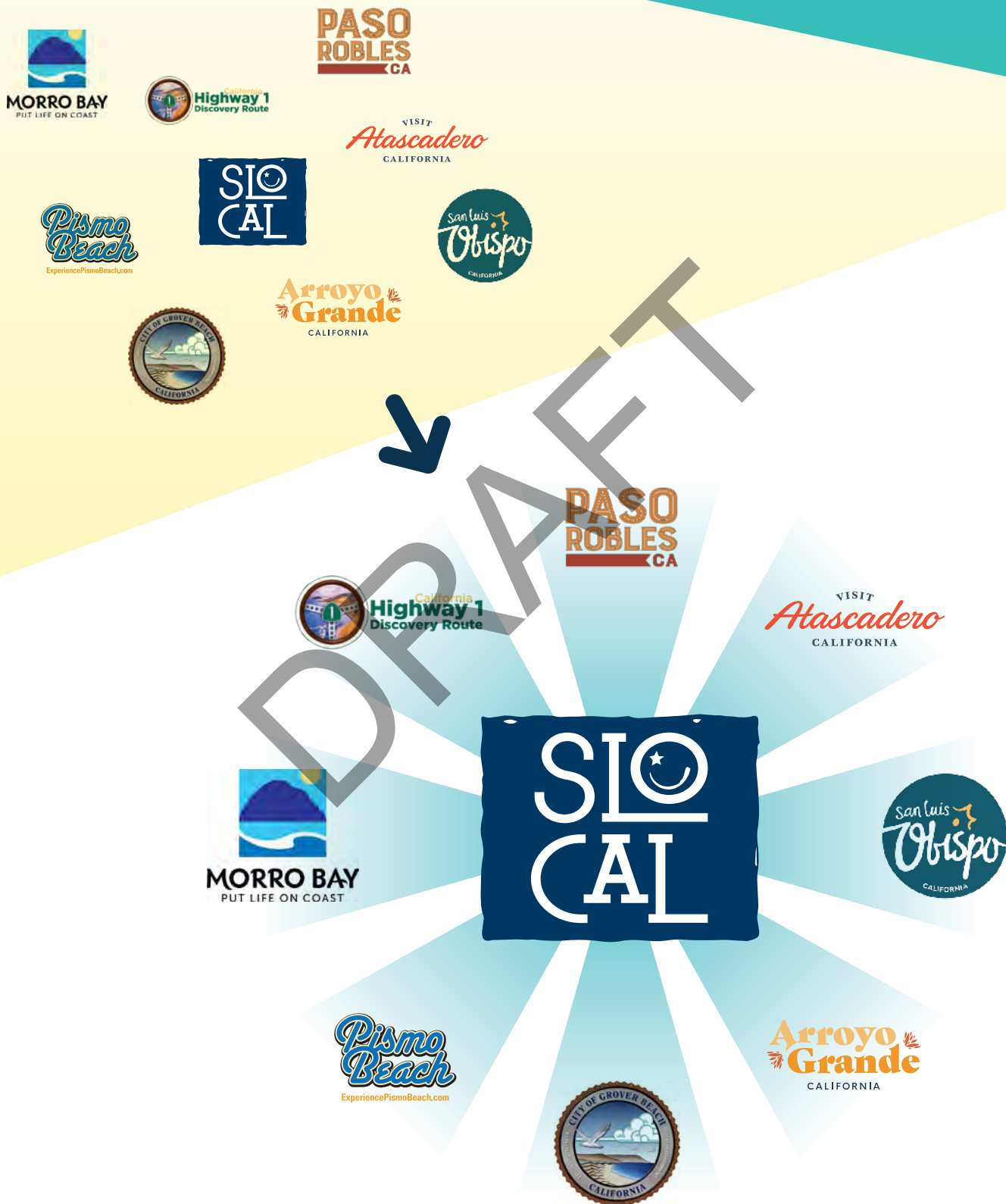
#### KEY RESULTS

---

- Universal adoption of SLO CAL brand identification by all local destination partners by December 31, 2021
- Universal adoption of website cross linking by all local destination partners by December 31, 2021



# HOUSE OF BRANDS CONNECTIVITY RECIPROCITY



# PHASE 2

## HOUSE OF BRANDS WAYFINDING

SLOCAL.com serves to inform consumers about the region and help them access experiences. Today, the cumbersome structure of the Explore SLO CAL navigation in the current website, which features 22 individual destination choices, makes it challenging to navigate and understand, while standardized individual destination landing pages lack any meaningful differentiation. To create greater clarity and make navigation easier for potential travelers, Visit SLO CAL will refresh SLOCAL.com in FY 2022.

### OBJECTIVES

---

- Implement new geographic architecture that makes it easier to understand the region, its diverse offerings and the proximity of individual destinations to each other
- Integrate new storytelling depth and dimension to better showcase individual destinations on SLOCAL.com landing pages
  - Development of microsite options for individual destinations interested in integrating into SLOCAL.com
  - Depending on need and buy-in, the level of integration/depth of navigation will vary (e.g., bookings, listings, calendars of events, galleries, widgets)
- Develop a unified SLO CAL brand aesthetic for individual destination websites not looking to integrate into SLOCAL.com
- Develop cross-region itineraries, events and/or promotions

### KEY RESULTS

---

- Launch of new SLOCAL.com website by December 31, 2021
- Evolution of individual local destination partner and Highway 1 Discovery Route websites to reflect a unified SLO CAL brand aesthetic by March 31, 2022
- Migration of three individual destination partner websites into SLOCAL.COM landing page or microsite by June 30, 2022
- Creation of 12 cross-region itineraries, events and/or promotions by June 30, 2022

# PHASE 3

## HOUSE OF BRANDS CAMPAIGN/ UNIFIED SLO CAL BRAND

Looking forward, Visit SLO CAL will seek to collaborate with individual destination brands to further unify marketing communications throughout the region and continue to amplify the SLO CAL brand. Building from a base of shareable assets created at the outset of the new brand campaign, Visit SLO CAL will work with interested local destination partners to develop a dedicated micro-campaign and suite of assets for use across paid, owned and earned channels. The micro-campaign and suite of assets will include expanded storytelling that honors the experiences of the individual destination within the overarching SLO CAL brand campaign.

### OBJECTIVES

---

- Establish micro-campaign approach
- Collaborate with local destination partners at the 2022 Marketing Retreat around micro-campaign concepting

### KEY RESULT

---

- Conduct a collaboration workshop at the 2022 Marketing Retreat



# TARGET AUDIENCE

## THE PURPOSEFUL TRAVELER

Evolving from Visit SLO CAL's earlier audience approach that targeted consumers who take at least two or more domestic vacations annually or spend \$2,000+ on domestic vacations annually, The Purposeful Traveler target has added dimension and embodies a SLO CAL state of mind.

Purposeful Travelers live vividly and value simplicity, keeping life and the mind as uncluttered as possible. Authenticity and being true to oneself while maintaining strong personal relationships with family and friends is very important. Curious and creative, they are open-minded, want to explore and learn about new things, and seek stimulating experiences. They are in tune with nature and themselves, doing activities they enjoy.

DRAFT



## THE PURPOSEFUL TRAVELER: DEMOGRAPHICS



46% MALE 54% FEMALE



57% MARRIED 29% SINGLE



40% CHILDREN IN HOUSEHOLD



43% GRADUATED COLLEGE

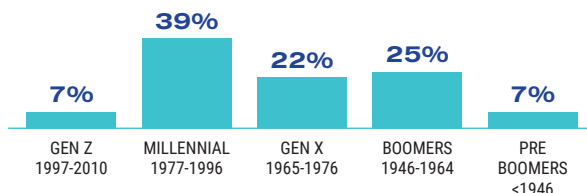


\$130.4K HOUSEHOLD INCOME

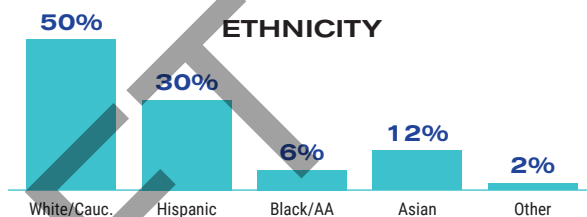


46.0 AVERAGE AGE

### GENERATION



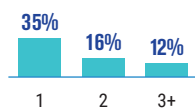
### ETHNICITY



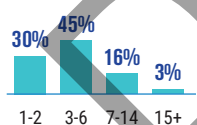
Source: MRI 2020 (Mindset & Traveled 1+ nights)

## THE PURPOSEFUL TRAVELER: TRAVEL PROFILE

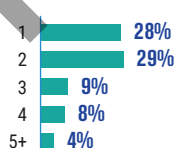
### # ANNUAL VACATION TRIPS



### # NIGHTS AWAY LAST TRIP



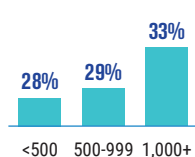
### # TRAVEL PARTY LAST TRIP



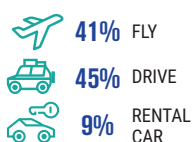
### TRAVEL WITH LAST TRIP



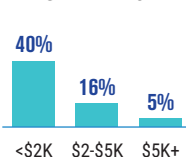
### # MILES TRAVELED LAST TRIP



### MEANS OF TRAVEL LAST TRIP

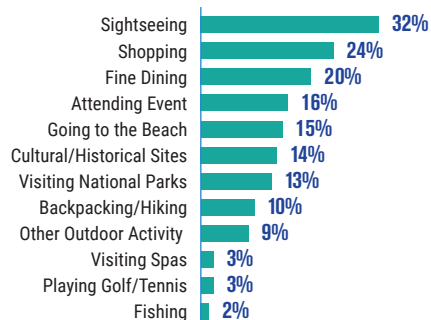


### ANNUAL TRIP SPENDING

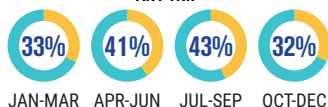


**\$2,038**  
AVG. ANNUAL TRIP SPENDING

### TRIP ACTIVITIES ANY TRIP



### WHEN TRIPS TAKEN ANY TRIP



Source: MRI 2020 (Mindset & Traveled 1+ nights)

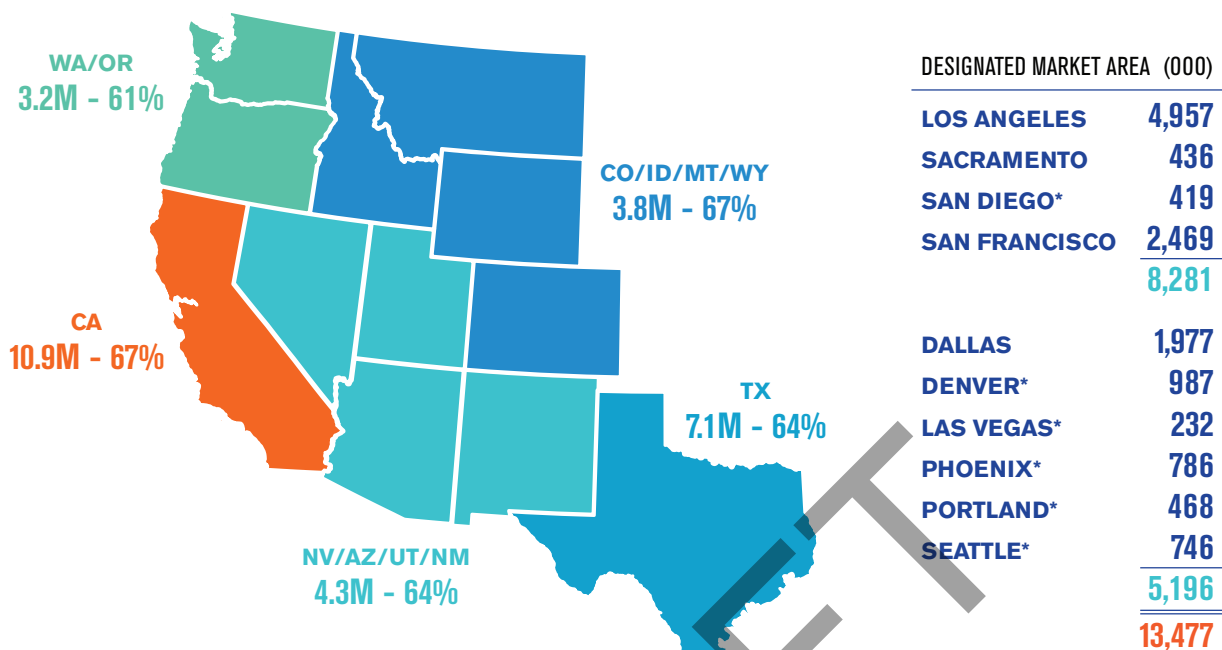


# GEOGRAPHIC PRIORITIZATION

A photograph of three people (two men and one woman) smiling and holding wine glasses, standing outdoors against a bright, hazy background. The image is partially covered by teal and white geometric shapes. A large, faint, diagonal watermark reading 'DRAFT' is visible across the center of the image.

Across Visit SLO CAL's target markets,  
The Purposeful Traveler audience is just  
over 13 million, with 10.9 million residing  
in California.

# THE PURPOSEFUL TRAVELER: TARGET UNIVERSE



Source: MRI 2020 (Mindset & Traveled 1+nights)

\*Estimated based on % of DMA

For FY 2022, geographic markets will be prioritized using a tiered system. Tier 1 markets represent the greatest share of visitation to SLO CAL. These in-state drive markets generate a large volume of overnight stays and will continue to be the top priority for investment based on population, existing awareness and destination interest. While the Tier 2 drive/fly markets do not represent the same volume of overnight visitation as Tier 1 markets, the opportunity for growth lies in appealing to road trippers as well as those who prefer to fly.

Investment in Tier 3 fly markets will be limited to support of new flights and/or to capitalize on growth opportunities as needed.

## 2019 SLO CAL ARRIVALS BY ORIGIN MARKET

DESIGNATED MARKET AREA	% OF ARRIVALS	PRIORITY
LOS ANGELES	21.23%	Tier 1 (Drive)
SAN FRANCISCO/OAKLAND/SAN JOSE	9.61%	
SACRAMENTO/STOCKTON/MODESTO	5.96%	
SAN DIEGO	1.89%	Tier 2 (Drive/Fly)
PHOENIX	0.50%	
LAS VEGAS	0.34%	
PORTLAND	0.17%	Tier 3 (Fly)
SEATTLE/TACOMA	0.12%	
DENVER	0.08%	
DALLAS/FORT WORTH	0.03%	



# PAID MEDIA

**As the country begins to emerge from the COVID-19 crisis and vaccinations fuel traveler confidence, travel searches are showing increased activity as consumers look to capitalize on pent-up wanderlust. Adding to the increase in travel demand will be increased competition as destinations look to rebound from a challenging year. Driving awareness and establishing a strong share of voice will be critical for SLO CAL to break through the clutter and create impact.**



**With this in mind, the FY 2022 media plan is built on a foundation of flexibility, creativity and innovation, providing maneuverability as travel trends evolve. Flexibility within the media plan will be paramount, allowing for shifts in strategies based on real-time signals. Creativity and innovation will be at the core of the media plan, delivering new opportunities for greater depth and dimension of storytelling while driving brand engagement to keep SLO CAL top of mind.**

## STRATEGIES

---

- Build upon previous campaign learnings to maintain the momentum created with current audience segments during recovery
- Engage media partners with the ability to deliver against The Purposeful Traveler: SLO CAL State of Mind
- Reprioritize target geographies using a tiered approach to focus dollars for maximum impact
- Implement a phased media approach to account for potential changes in the travel landscape, allowing SLO CAL to break through the clutter by increasing share of voice as competition and demand increase
- Deploy a diverse media mix, leveraging channels with strong reach and engagement of target segments, while offering opportunities for greater depth of messaging
- Explore opportunities to leverage first-party data as third-party cookies begin to disappear

## OBJECTIVES

---

- Build top-of-mind awareness of the SLO CAL brand
- Create greater engagement with SLO CAL content, educating consumers on the unique destinations that make up the SLO CAL House of Brands
- Aid air service recovery by generating awareness of routes in key fly markets and driving demand for visitation

## TACTICS

---

### VIDEO

- Media: Pre/Mid-Roll, In-stream and Out-stream Video
- Channels: Smart TVs, Streaming Platforms and Cross-Device Retargeting

### DISPLAY ADVERTISING

- Media: Native Content, Rich Media and Banner Ads
- Channels: Native and Programmatic Display Networks, High Reach Partnerships with Travel Synergies

### SOCIAL MEDIA ADVERTISING

- Media: Video Ads and Traffic Driving Ads
- Channels: Social Media Platforms

### PAID SEARCH

- Media: Text Ads
- Channels: Search Engine Results Pages

## KEY RESULTS

---

- Key results and campaign benchmarks will be clearly defined two weeks prior to the launch of all media activity.

# PHASED APPROACH

As traveler confidence grows, a gradual increase in travel intent and visitation can be anticipated. FY 2022 paid media activity will maintain a phased approach with the flexibility to adjust as needed based on travel signals and emerging trends.

	PHASE 1	PHASE 2	PHASE 3
<b>ESTIMATED TIMING</b>	July–August	September–January	February–June
<b>MANAGING FOCUS</b>	Inspirational & Informative	SLO CAL Brand/ House of Brands Campaign Potential Shoulder Season Message	SLO CAL Brand/ House of Brands Campaign
<b>TACTICAL FOCUS</b>	Maintenance level full-time support	Expanded exposure to include content program to drive engagement	Emphasis on high- and mid-funnel tactics
<b>MARKET FOCUS</b>	Tier 1 Drive Markets: Los Angeles, Sacramento & San Francisco Tier 2 Fly/Drive Markets: Las Vegas, Phoenix, San Diego	Tier 1 Drive Markets & Tier 2 Fly/Drive Markets as needed Tier 3 Market: Portland	Tier 1: Drive Markets & Tier 2 & 3: Support as needed
<b>BUDGET ALLOCATION</b>	8% per month	Sep–Nov: 11% per month Dec: 6%	Jan: 6% Feb–Apr: 9% per month May–Jun: 6% per month

# CAMPAIGN TIMING

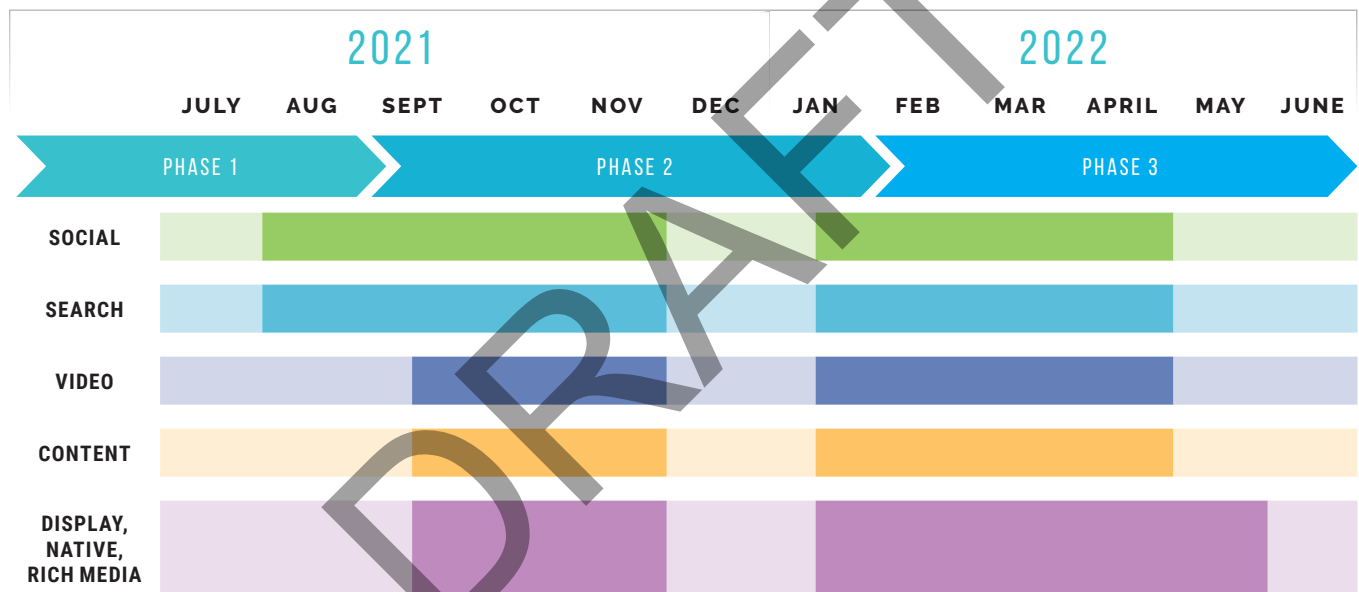
**Over the past year, travel bookings have occurred in a shorter window than what was the norm pre-COVID-19, with more trips planned spur of the moment. Arrivalist data from 2019 indicated nearly half of all visitation occurring 91+ days following an ad exposure; this narrowed to 60 days in 2020 (even shorter for closer California markets).**

Current industry data indicates planning lead times are beginning to extend further out as people plan for the future. Due to changing lead times, paid media may impact visitation anywhere from 30 to 90 days following exposure, indicating a need for an always-on presence with seasonal heavy-ups.



# FY 2022 MEDIA TIMELINE

## FY 2022 MEDIA TIMELINE



The always-on layer will launch in Phase 1 with activity flighted throughout the fiscal year, establishing the foundation of the campaign. Continual optimizations will ensure the pool of prospective travelers is continually refreshed, while current audiences are pulled further through the funnel.

The new SLO CAL brand/House of Brands campaign will deploy in early fall, marking the launch of Phase 2. Increased media exposure will focus on engagement as the work of educating prospective visitors on all SLO CAL has to offer begins.

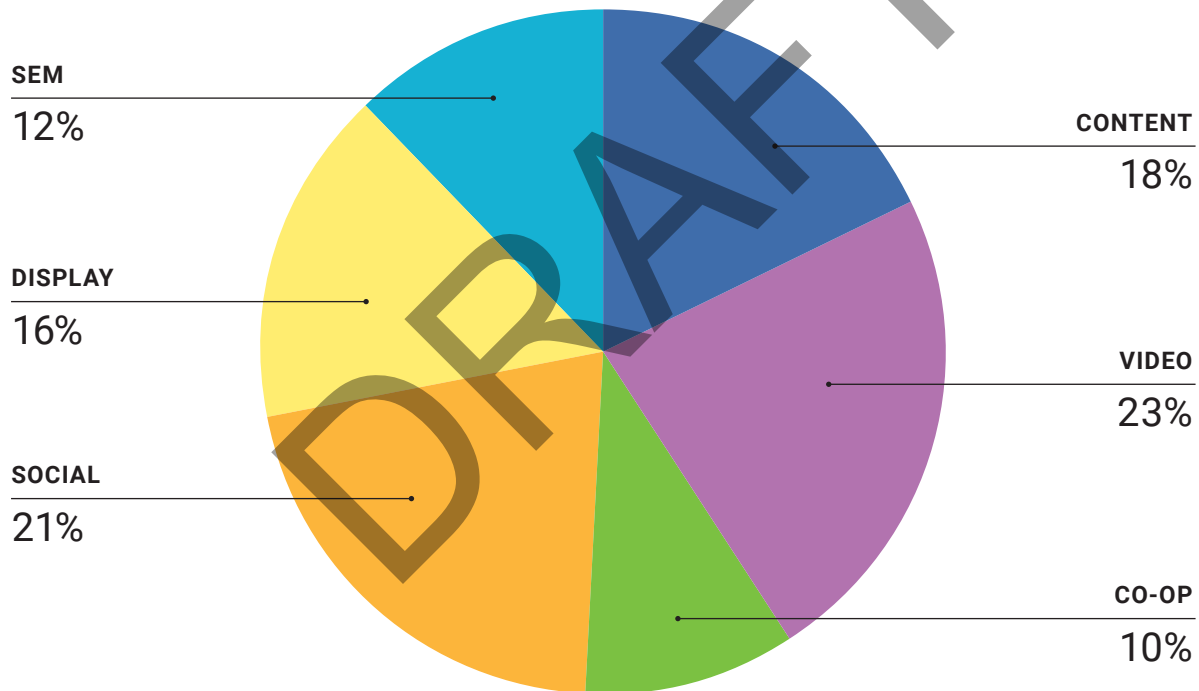
As competition is anticipated to pick up in the second half of the year, paid media funds have been allocated to further heavy-up and break through, keeping SLO CAL at the forefront of travelers' minds. Activity will not only evolve to leverage efficiencies for top-of-mind awareness, but will include new opportunities to further elevate SLO CAL storytelling.

Air service messaging in spot markets will be flighted according to seasonality of the selected regions and time periods with opportunity for growth.

# MEDIA MIX/BUDGET ALLOCATION

The media mix was developed with an emphasis on upper- and mid-funnel exposure. Current media usage trends along with previous Visit SLO CAL campaign results were analyzed to determine the most effective mix to deliver on campaign objectives and strategies as efficiently as possible. As new data is collected, the media mix will be optimized based on real-time key performance indicators (KPIs).

**TOTAL SPEND \$2.6M\***



\* Print advertising <1%

# MEASUREMENT, OPTIMIZATION & KEY PERFORMANCE INDICATORS

Each component of the paid media plan has a specific function in the planning funnel and will be measured and optimized according to clearly defined KPIs.

<b>TACTICS:</b> VIDEO CONTENT RICH MEDIA	<b>AWARENESS</b> 50%	<b>Primary KPIs:</b> Video Completion Rate Content Views	<b>Secondary KPIs:</b> Video Views Time with Content Engagement Rate
NATIVE SOCIAL	<b>CONSIDERATION</b> 30%	Click-Through Rate Sessions Pageview	Time on Site Onsite engagement
DISPLAY SOCIAL SEARCH	<b>INTENT</b> 20%	Partner Handoffs/ Referral Rate Booking Searches/ Search Rates	Arrival Lift/ Arrivals per 1k impressions

Tracking partners such as Campaign Manager, Integral Ad Science and MOAT will be used to monitor campaign performance, as well as quality and brand safety, while providing opportunities for campaign optimizations. Campaigns will be monitored weekly for pacing against primary KPI goals established at the onset of each campaign. Optimizations will be implemented as needed throughout each flight to ensure delivery of high-quality impressions is creating desired results for each campaign tactic.

The primary campaign KPIs will provide insight into audience interest and engagement, but will not be able to deliver on brand awareness lift. In order to track brand awareness growth, awareness studies will need to be conducted at various points throughout the fiscal year. When possible, brand lift studies will be negotiated with media partners to determine awareness levels for specific campaign elements.







# OWNED MEDIA

**Visit SLO CAL continues to develop and distribute a wealth of original content to engage consumers and inspire cross-visitation of the county through a robust owned channel ecosystem that includes SLOCAL.com, email marketing, print and social media channels.**

## STRATEGIES

---

- Launch a new SLOCAL.com website, incorporating an accessible, content-first approach to expand upon the House of Brands strategy
- Bring engaging video to the forefront of VSC's editorial footprint
- Utilize best-in-class email marketing automation and SLOCAL.com to deliver more personalized experiences for consumers
- Consistently use create once, distribute everywhere (CODE) method for efficient distribution and stronger return on investment to grow digital audiences
- Promote events and festivals with a consolidated and countywide calendar system to increase visitation
- Amplify and empower local, diverse and authentic storytelling that is compelling and engaging to target audiences



## OBJECTIVES

---

- Implement new technologies and industry best practices to refine usability, user experience and personalization targeting for SLOCAL.com
- Create a diverse, equitable and inclusive editorial footprint to promote SLO CAL as a top destination for domestic and international audiences
- Align VSC's owned channels to promote a House of Brands strategy to increase reach, performance and engagement key performance indicators (KPIs) through consistent brand messaging
- Utilize the new website and brand evolution to implement the recovery and resiliency plan for key marketing initiatives
- Increase partner handoffs, SEO ranking and return on investment from owned media campaigns, website and social media channels
- Strengthen SLO CAL as the county's premier brand identity to increase reciprocity and threads of connectivity to each partner destination

## KEY RESULTS

---

- Create Equity, Diversity and Inclusion (EDI) digital content strategy by September 30, 2021
- Completion and launch of a new, immersive, mobile-first website redesign by December 31, 2021
- Develop a lead scoring model via the Act-On platform to create an integrated ecosystem of the consumer journey through list segmentation and customized campaigns by December 31, 2021
- Transition annual Official Visitors Magazine to an inspiration guide with a digital focus by December 31, 2021
- Following completion of website redesign on December 31, 2021, increase annual partner referrals 15% by June 30, 2022
- Execute EDI digital content strategy and marketing efforts by June 30, 2022, curating 30 editorial pieces and 30 original video assets through local writers and digital influencers/tastemakers
- Increase website sessions, social media followers and e-communication subscribers' open rates and click rates engagement with target audience by 5% by June 30, 2022
- Increase non-paid web traffic by 5% from 2019 baseline by June 30, 2022
- Complete the first three phases of the House of Brands initiatives, including creation of landing pages and/or microsites tailored to each community, by June 30, 2022

# EARNED MEDIA & PUBLIC RELATIONS

**Earned media allows Visit SLO CAL to strengthen destination exposure through third-party endorsements from journalists and social media influencers. VSC and its national public relations agency, TURNER PR, will continue to work collaboratively to bring domestic media to SLO CAL to expand media knowledge of destination-specific offerings and create storytelling opportunities that increase awareness and ultimately visitation.**

## STRATEGIES

---

### PROACTIVE PITCHING

- Leverage media relationships to secure quality SLO CAL coverage across national consumer (e.g., travel, culinary, eco/adventure, families) and trade outlets, in addition to key regional publications in drive and fly markets
- Focus on arranging qualified media and influencer visits to discover SLO CAL firsthand for larger feature opportunities that highlight the entire region
- Consistently reach out to local and regional business and tourism media with ongoing news and updates, developing relationships and a steady cadence of thought leadership positioning

### KEY MARKETS, EVENTS AND ACTIVATIONS

- Dedicated focus on out-of-state direct fly markets, including virtual deskside media missions, to boost potential visitation from those key areas as air travel returns post-pandemic
- Leverage Xplorit virtual site inspection technology content in deskside media meetings, media missions, and in small event and experiential programs
- Continued focus on national coverage and media-rich markets that VSC partners do not have the budget or bandwidth to be present in, such as Chicago, Denver, Dallas, Las Vegas, Portland, Phoenix, Salt Lake City, and Seattle.

### PARTNER RELATIONS

- Increase and streamline communication between VSC, lodging investors and community partners through new programs and key initiatives, including an opt-in media leads distribution system and a quarterly PR newsletter

A man and a woman are playing beach volleyball on a grassy field. The man is on the left, wearing a light blue shirt and sunglasses, with his arms outstretched. The woman is on the right, wearing an orange patterned dress and sunglasses, in a ready position. A volleyball is in the air above them. The background shows trees and a clear blue sky.

## OBJECTIVES

---

- Use narrative-driven storytelling to introduce SLO CAL as a top vacation destination, increasing overall destination recognition within core national and regional consumer media and trade outlets that reach the target audience
- Embrace recovery efforts by emphasizing the diversity of SLO CAL's landscapes and adventures with the California Less Traveled<sup>SM</sup> messaging, appealing to key regional drive markets, with an emphasis on increasing demand
- Increase SLO CAL's voice and reach with local media outlets by making visibility and accessibility a priority, continually spotlighting the important role that tourism plays in the overall economy and community
- Grow and maintain SLO CAL's share of voice within targeted regional fly markets and national media to place a spotlight on the destination and set it apart from competitors
- Leverage brand awareness of SLO CAL and its partners' destinations to help increase traffic and cross-visitation, creating room night demand and growing revenue

## KEY RESULTS

---

### MEDIA COVERAGE (QUALITY + QUANTITY)

- At least 60% of annual earned media coverage secured in outlets will be found on the approved priority publications list of national and international consumer media and trade outlets that reach the target audience
- At least 65% of annual coverage secured will include a direct link and/or quotes from Visit SLO CAL
- At least 60% of all articles secured will mention two or more areas/partners in the SLO CAL region
- Launch of hot leads program will allow response to quick turn media opportunities by September 30, 2021

### MEDIA HOSTING

- Host 20 media representatives who contribute to agreed-upon national and/or regional (fly market focus) priority publications

### MEDIA MISSIONS & ACTIVATIONS

- Host four virtual deskside media missions, one per quarter, in markets where SLO CAL partners are not currently present (complete by June 30, 2022)

### PREPAREDNESS

- As part of the fall educational symposium, educate destination partners on the updated crisis communication plan by November 30, 2021



# EARNED MEDIA & PUBLIC RELATIONS (CONTINUED)

## NARRATIVES

---

### REVENGE TRAVEL

As consumers embrace travel experiences following the COVID-19 pandemic and subsequent lockdowns, they are looking for opportunities to make up for lost time, celebrating with family and friends in new ways. Engaging in what is being coined as “revenge travel,” where consumers splurge on luxury travel experiences or extended stays, will be a priority.

### MEANINGFUL TRAVEL

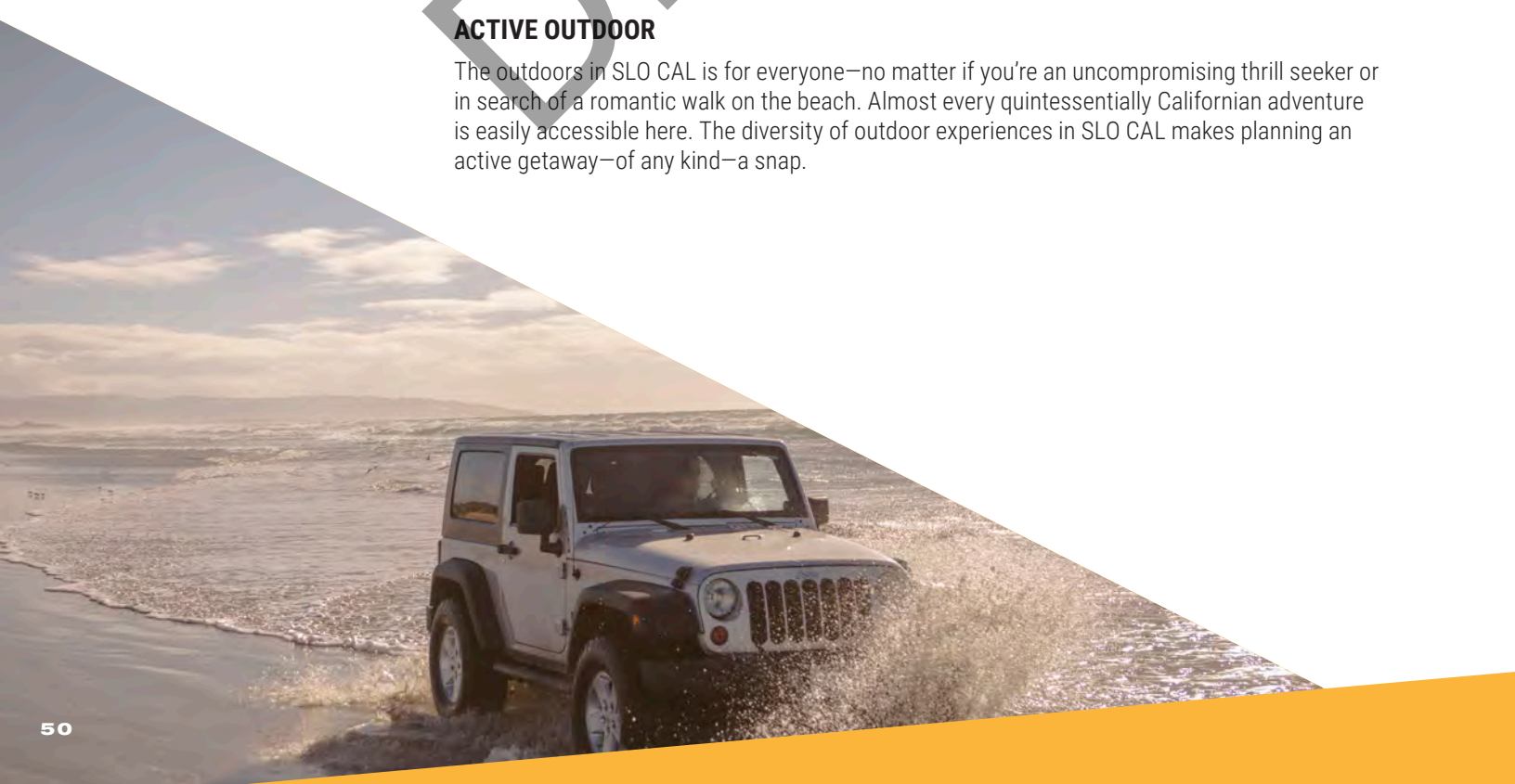
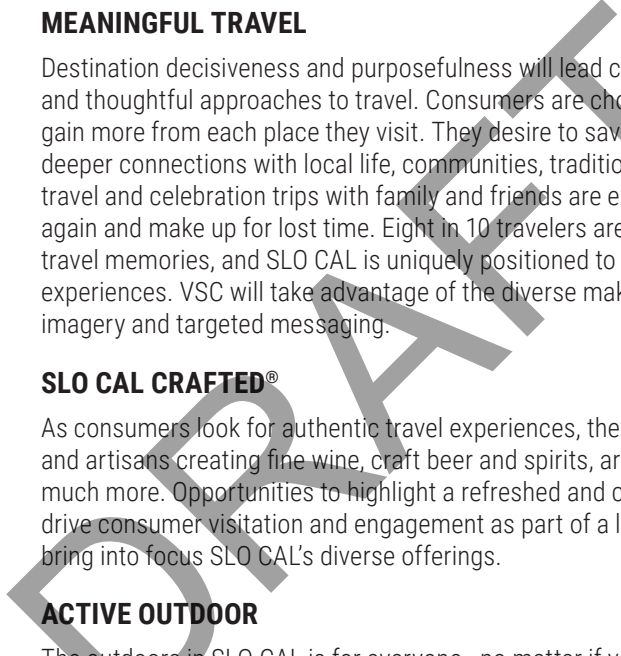
Destination decisiveness and purposefulness will lead consumers to practice more deliberate and thoughtful approaches to travel. Consumers are choosing to visit fewer attractions and to gain more from each place they visit. They desire to savor each moment and expect to have deeper connections with local life, communities, traditions and artisans. Multigenerational travel and celebration trips with family and friends are expected to increase as people gather again and make up for lost time. Eight in 10 travelers are expected to prioritize creating new travel memories, and SLO CAL is uniquely positioned to offer a wide variety of authentic experiences. VSC will take advantage of the diverse makeup of its communities through imagery and targeted messaging.

### SLO CAL CRAFTED®

As consumers look for authentic travel experiences, they seek locally made products by artists and artisans creating fine wine, craft beer and spirits, artisan cheeses, honey, lavender and much more. Opportunities to highlight a refreshed and cohesive SLO CAL Crafted® brand and drive consumer visitation and engagement as part of a larger November 2021 initiative will bring into focus SLO CAL's diverse offerings.

### ACTIVE OUTDOOR

The outdoors in SLO CAL is for everyone—no matter if you're an uncompromising thrill seeker or in search of a romantic walk on the beach. Almost every quintessentially Californian adventure is easily accessible here. The diversity of outdoor experiences in SLO CAL makes planning an active getaway—of any kind—a snap.









# PARTNERSHIPS & EVENTS

**Visit SLO CAL offers added value to partners by creating opportunities to participate in programs that provide additional exposure to new audiences through advertising and owned channels.**

## SLO CAL CRAFTED®

### STRATEGIES

---

- Create equity in the SLO CAL Crafted brand, tapping into consumers' desire for authentic experiences and products
- Establish the SLO CAL Crafted brand within the larger House of Brands strategy

### OBJECTIVES

---

- Certify partners who meet established requirements, which include requiring businesses to be headquartered in SLO CAL with primary design and manufacturing done in SLO CAL
- Develop opportunities in overarching marketing initiatives to highlight the quality, local products made, farmed and grown in SLO CAL
- Highlight various communities throughout the destination by incorporating SLO CAL Crafted certified businesses into the House of Brands strategy

### KEY RESULTS

---

- Achieve 60 new partner registrations for SLO CAL Crafted by December 31, 2021, and 20 registrations per quarter, beginning Q2, for inclusion in content, itineraries and future events and activations centered around SLO CAL Crafted experiences
- Create content strategy and itineraries focused on authentic SLO CAL Crafted experiences, listed on a dedicated landing page by December 31, 2021
- Create a countywide map of SLO CAL Crafted certified businesses and collateral that connects the rooms within the House of Brands together by June 30, 2022





## RESTAURANT MONTH

### STRATEGIES

- Highlight culinary opportunities in SLO CAL during the January 2022 shoulder season
- Create opportunities for additional partnerships with VSC

### OBJECTIVES

- Launch Restaurant Month focused on special deals throughout the county
- Create a participation baseline for event deals and incentives
- Establish paid and owned media opportunities to drive consumer demand
- Host a Restaurant Month kick-off event to drive media and social media awareness

### KEY RESULTS

- Create a special deals strategy by collaborating with past participants by August 31, 2021
- Balance participation throughout the county by compiling an inventory of eligible restaurants with a goal of every community having appropriate representation in the program by August 31, 2021
- Register 60 restaurants from around the county to participate in the 2022 event
- Engage 25% of participating restaurants to donate a dining experience that can be used in social media and digital contests with commitments made by November 30, 2021
- Kick off Restaurant Month the first week of January 2022

## SPARTAN RACE, SLO CAL OPEN & OTHER SIGNATURE EVENTS

### STRATEGIES

- Increase destination familiarization and exposure to a new visitor mix through signature events
- Intentionally create cross-visitation opportunities during event participation

### OBJECTIVES

- Identify and sponsor signature events to drive visitation in need periods
- Create brand alignment with national and international brands that fit SLO CAL's personality in order to increase destination awareness

### KEY RESULTS

- Update bid criteria for event sponsorships to align with cross visitation goals (completed by July 31, 2021)
- Increase awareness and exposure of the SLO CAL Open through the promotion of two competitors who will have the opportunity to compete in larger events based on qualifying at the SLO CAL Open
- Identify and negotiate a new Visit SLO CAL sponsored event, by June 30, 2022, to drive shoulder season visitation in FY 2023



# PARTNERSHIPS & EVENTS (CONTINUED)

## PARTNER ENGAGEMENT

### STRATEGIES

---

- Expand knowledge and reach of VSC and participation with and by tourism partners throughout the county to increase storytelling opportunities
- Provide a platform to increase advocacy efforts

### OBJECTIVES

---

- Utilize SLO CAL Connection to provide partner value through the dissemination of timely research and reports as well as give partners ownership of their listing, the ability to view their benefits summary and access to respond to sales, trade and media leads
- Increase awareness of destination information and events through *This Week in SLO CAL*
- Utilize the Act-On platform to drive engagement of subscribers to *This Week in SLO CAL* to increase partner participation in key marketing initiatives

### KEY RESULTS

---

- Onboard 20 new partners each quarter who engage in two or more VSC opportunities, not including partners involved with SLO CAL Crafted initiatives
- Create CRM reporting mechanism to track free listings updated by partners and create a baseline by August 31, 2021
- Achieve 30% participation rate of new partners in owned and earned media activities by June 30, 2022

## LIFE'S TOO BEAUTIFUL TO RUSH® MURAL TRAIL | DESTINATION PARTNERS

### STRATEGIES

---

- Brighten and beautify the communities while incentivizing Instagrammable public art murals

### OBJECTIVES

---

- Catalog existing murals throughout SLO CAL to create a mural trail and identify opportunities for mural creation by leveraging partnerships with local destination partners and community engagement with artists

### KEY RESULTS

---

- Inventory and map existing murals through SLO CAL by December 31, 2021
- Develop digital countywide mural trail by highlighting existing trails and creating new artwork by January 31, 2022
- Identify and leverage four public art funds that can be used in specific destinations to increase footprint and create artwork by March 31, 2022

# SALES

COVID-19 gravely impacted the travel and tourism industry across all verticals; tour and travel and meeting and conference are no exception. Due to travel and event restrictions over the past year, Visit SLO CAL shifted its short-term sales strategy to a more in-state approach. Moving forward, VSC will continue to nurture and grow relationships with California-based meeting and event planners and domestic travel advisors, and will reactivate international representation in key markets when the time is right. In addition, VSC will work closely with lodging investors and meeting facilities partners to increase bookable hotel and meeting space products through strategic platforms, making it easier for tour operators and meeting planners to choose SLO CAL.

## MEETING & CONFERENCE

### STRATEGIES

---

- Advance partnership with Cvent
- Organize and execute in-person sales missions
- Attendance at the following industry trade shows
  - CalSAE Seasonal Spectacular
  - MPI ACE
  - All Things Meetings Reception & Tradeshow
- Develop and launch Xplorit virtual site inspection program
- Continue to build and promote the advanced facilities module on Visit SLO CAL website

### OBJECTIVES

---

- Generate qualified group sales leads during need times
- Provide lodging investors and partners with sales opportunities to engage target audiences and increase business
- Provide meeting and event planners with robust online venue sourcing tools

### KEY RESULTS

---

- Generate 96 sales leads through Cvent's online venue sourcing software (increase of 15%, 13 leads over 2019) by June 30, 2022
- Participation of 11 lodging investors or partners in co-op sales initiatives by March 31, 2022
- Provide 52 meeting and conference tradeshow sales leads for lodging investors per quarter
- Develop and launch Phase 1 of Xplorit virtual site inspection program by November 30, 2021
- Review and update 30 meeting venue listings per quarter in the advanced facilities module on SLOCAL.com

## TOUR & TRAVEL

### STRATEGIES

---

- Attendance at the following industry trade shows
  - IPW (September 2021 and June 2022)
  - National Tour Association Travel Exchange
  - Go West Summit
- Organize and execute in-person sales mission
- Leverage relationship with Visit California to partner on sales programs
- Host Visit California's fall Luxury Forum

### OBJECTIVES

---

- Build and nurture relationships with international and domestic tour operators and travel buyers to increase shoulder season occupancy
- Increase bookable product through receptive tour operators and bed banks to aid in long-term industry resilience
- Provide lodging investors and partners sales opportunities to engage with target audiences

### KEY RESULTS

---

- Facilitate and confirm five direct contracts per quarter between receptive tour operators and lodging investors/partners
- Increase shoulder season hotel room revenue (October - March) by 15% over 2019 through top producing tour operators, by March 31, 2022
- Participation by seven lodging investors or partners in co-op sales initiatives by June 30, 2022.
- Generate 100 tour and travel sales leads for lodging investors and partners by June 30, 2022
- Participation in one Visit California sales program per quarter







# FILM SLO CAL

**Film SLO CAL, the San Luis Obispo County Film Commission, and a division of Visit SLO CAL, promotes the county as a filming location and aims to increase the overall economic impact of filming in the destination. Film SLO CAL works to accomplish this by generating, supporting and managing production leads for motion pictures, television and commercials, as well as encouraging a strong, collaborative film industry within SLO CAL.**

## STRATEGIES

---

- Position Film SLO CAL as the local film industry leader and the first point of contact for film professionals with SLO CAL
- Increase awareness of SLO CAL as a unique filming location due to its diverse landscapes and accessibility to different scenic areas
- Expand Film SLO CAL's reach and exposure with location scouts, production managers and film industry professionals
- Increase economic impact of filming in SLO CAL through production leads, staged productions and filming days



## OBJECTIVES

---

- Generate earned media to create awareness about the variety of opportunities to film in SLO CAL
- Further develop communication channels and foster one-on-one relationships with location managers, producers and scouts
- Build and strengthen relationships with the California Film Commission (CFC), Film Liaisons in California Statewide (FLICS) and other strategic partners to stay informed of industry happenings, new film incentives and overall trends in the film business
- Educate local tourism partners on the filming industry, the opportunity to attract film scouts and the filming industry's contribution to SLO CAL
- Educate the local film industry on the role of Film SLO CAL and opportunities to partner
- Leverage partnership with the San Luis Obispo International Film Festival (SLOIFF) to attract filmmakers, producers, film crews and consumers to SLO CAL
- Collaborate with city, county and state liaisons to turn leads into tangible opportunities and to ensure reporting and tracking are updated and accurate

## KEY RESULTS

---

- Create two earned media stories highlighting film locations throughout SLO CAL by December 31, 2021
- Create and activate communication plan to build relationships with local managers, producers and/or scouts by September 30, 2021
- Attend CFC and FLICS monthly/quarterly meetings and annual events to network and strengthen relationships
- Deliver pre and post local scout familiarization tours, increasing industry engagement through partnership with SLOIFF annual event
- Conduct and leverage local quarterly film commission meetings with municipalities and county
- Create base performance levels in line with FY 2019 including over 100 productions, 250 film days, 1,200 room night and over 100 leads, and report results within 30 days of the end of each quarter

# EXPERIENCE SLO CAL 2050



Visit SLO CAL has concentrated on addressing immediate concerns and needs affecting the county's Travel and Tourism Industry during the COVID-19 pandemic. Due to this, the momentum with the Experience SLO CAL 2050 recommendations, previously approved by the Board of Directors, has slowed. As California advances toward a post-pandemic mindset and travel and tourism steadily increase, VSC is once again focused on advancing the Experience SLO CAL 2050 recommendations.





## ITEMS VISIT SLO CAL WILL ADVOCATE FOR IN FY 2022

### COUNTYWIDE TRAIL SYSTEM

---

Beginning fall 2021, Visit SLO CAL will partner with trail organizations and county and municipal stakeholders to begin working on an agreement for a joint strategy, plan and advocacy approach for a countywide connected trail system in SLO CAL. The support and promotion of a connected SLO CAL will benefit both residents and visitors who love to walk, hike, run, bike and ride horseback.

### TALENT ATTRACTION, DEVELOPMENT & 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. Visit SLO CAL will continue to advocate for and support countywide economic development organizations and educational institutions to strengthen talent development opportunities for current residents and attract new talent to the market.

### WORKFORCE HOUSING & TRANSPORTATION

---

Visit SLO CAL will continue to partner with the broader Coalition of Housing Partners in exploring and creating strategies to address the need for greater workforce housing availability. At the same time, VSC will work with the San Luis Obispo Council of Governments (SLOCOG) and the Regional Transit Authority (RTA) to research and explore transportation options and the potential for allocating (or reallocating) resources and assets to improve and/or enhance public, private and industry transportation options for Travel and Tourism industry workers.

## ITEMS TO BE COMPLETED/FUNDED BY VISIT SLO CAL

### CUSTOMER SERVICE TRAINING INITIATIVE

---

Visit SLO CAL has recently moved forward with the Customer Service Training Initiative by releasing an RFP to interested agencies specializing in program development. The selected agency and Visit SLO CAL will collaborate with investors and industry partners to develop customer service and destination awareness training. This platform will be web and mobile based and will be available at no cost to participants, allowing for every employee in the travel and tourism industry to develop their understanding and skill set in providing enhanced guest experiences. This platform will also allow industry employees to be more informed on things to do across the market, better leveraging existing assets and promoting cross-visitation between communities. The training program is expected to be completed and available by May 31, 2022.

### EVENTS & FESTIVALS STRATEGY

---

In spring 2021, Visit SLO CAL released an RFP to interested agencies skilled in strategic planning related to events and festivals. The selected agency and Visit SLO CAL will collaborate with key lodging investors and partners within the tourism community, county and municipal stakeholders, as well as those involved with organizing and producing countywide events, to create a comprehensive countywide Events & Festivals Strategy. The process will begin with a thorough analysis of existing events and festivals to understand current situations, strengths, and weaknesses. That data will inform the basis of the strategy, which will establish strategies and planning for creating, incubating and facilitating visitor-related events and festivals. It will provide an analysis of high-impact rated events, best locations, and key off-season and mid-week periods to drive lodging demand and yield top rates throughout the year. The Events and Festivals Strategy will also include defined performance measures for continued resources and a plan for program sponsorship and funding. A newly updated countywide events calendar to be housed on SLOCAL.com will be the final component of the strategy. The overall focus of the strategy is to bring positive economic contributions to SLO CAL and enhance the quality of life for residents.

### SPACE LAUNCH EVENTS

---

In line with the Thematic Routes recommendation, Visit SLO CAL will work to develop itineraries for launch viewing opportunities and work with lodging investors and partners to create multiday stay packages for visitors when space launch events are scheduled at Vandenberg Space Force Base. This will not only create a memorable stay in SLO CAL, but promote cross-visitation within the county. As the launch events are scheduled, Visit SLO CAL will increase event promotion, featuring the routes and packages created.

### THEMATIC ROUTES

---

Visit SLO CAL will work with local destination partners and communities to identify, create and strengthen existing thematic routes as well as build and promote multiday packages that travelers can use to plan their trips. Thematic routes based on personal interests, such as the Highway 1 Discovery Route, Farm Trail or Wine Trail, will help visitors understand SLO CAL's diverse region, while also encouraging cross-visitation to less-traveled areas of the county.

## VISIT SLO CAL'S EXISTING SCOPE OF WORK

### AIR SERVICE & AIRPORT DEVELOPMENT

---

Visit SLO CAL will continue working with the San Luis Obispo County Regional Airport to restore the flights paused during the COVID-19 pandemic, as well as attract additional flights to new markets and advocate for the continued development of airport infrastructure.

### PASO ROBLES WINE COUNTRY ALLIANCE & SLO COAST WINE COLLECTIVE

---

Visit SLO CAL will continue partnering with the Paso Robles Wine Country Alliance and SLO Coast Wine Collective to feature and celebrate the wines, vineyards, people and experiences associated with the wineries in these regions.

### SLO CAL CRAFTED®

---

A major focus for the upcoming year will be highlighting various communities throughout SLO CAL by incorporating SLO CAL Crafted businesses into Visit SLO CAL's House of Brands strategy. A countywide map featuring SLO CAL Crafted certified businesses will be created and included as part of the Experience SLO CAL 2050 Thematic Routes initiative.



# EQUITY, DIVERSITY & INCLUSION

**Visit SLO CAL is committed to ensuring its work fosters equity, diversity and inclusion within SLO CAL as a destination that embodies those qualities, so that all who travel to and through the region feel welcomed and embraced. In an effort to advance the Equity, Diversity and Inclusion (EDI) Plan, established June 2020, VSC will be focused on the following programs over the coming year.**

## **EDI AUDIENCE AND ASSET ALIGNMENT STUDY**

Gaining a clear understanding of the audience SLO CAL is working to attract, as well as the product availability within SLO CAL, is paramount to the destination's success. An EDI Audience and Asset Alignment Study will help inform product and service development and provide information on tourism experiences that currently meet or exceed visitor expectations by assessing specific EDI market segmentation. VSC's aim is to strengthen destination opportunities to identify, upgrade and enhance the market readiness of tourism products and services aimed at improving the visitor experience.

## **BUILDING EDI ASSETS**

Once the EDI Audience and Asset Alignment Study is complete, Visit SLO CAL will be well-positioned to create a focused marketing plan to meet diverse customer needs and expectations, thereby growing SLO CAL's visitor base. Visit SLO CAL is committed to working with destination partners and individual municipalities on their business plans to develop new products and services that will authentically target and attract visitors to a destination that is welcoming to all.

## **TARGETING MORE DIVERSE AUDIENCES THROUGH PR AND MARKETING EFFORTS**

Visit SLO CAL is working in partnership with TURNER PR and Mering to develop public relations and marketing campaigns that begin with better understanding SLO CAL's diverse marketplace audiences, and tailor messaging through a lens of diversity and inclusion. VSC's purpose is to widen its narrative by looking for publications and professionals who offer diverse perspectives, authentic voices and trailblazer mentalities that broaden product appeal to a wider array of people.

## **BOARD, COMMITTEES AND TEAM TRAINING**

Visit SLO CAL's Board of Directors and team are committed to being lifelong learners. VSC is partnering with an agency to host a mandatory training program for its board, committees and team, designed to provide a universal level of understanding on a variety of topics surrounding EDI, such as microaggressions, unconscious biases and mindfulness in the workplace.



## STRATEGIES

---

- Further refine and enhance Visit SLO CAL's Equity, Diversity and Inclusion Plan
- Collaborate with local destination partners and individual municipalities to authentically target and attract diverse audiences
- Expand awareness to more diverse audiences through public relations and marketing efforts
- Widen VSC's narrative to publications and professionals who offer diverse perspectives and authentic voices
- Amplify the voices of women-owned and minority-owned local travel and tourism related businesses

## OBJECTIVES

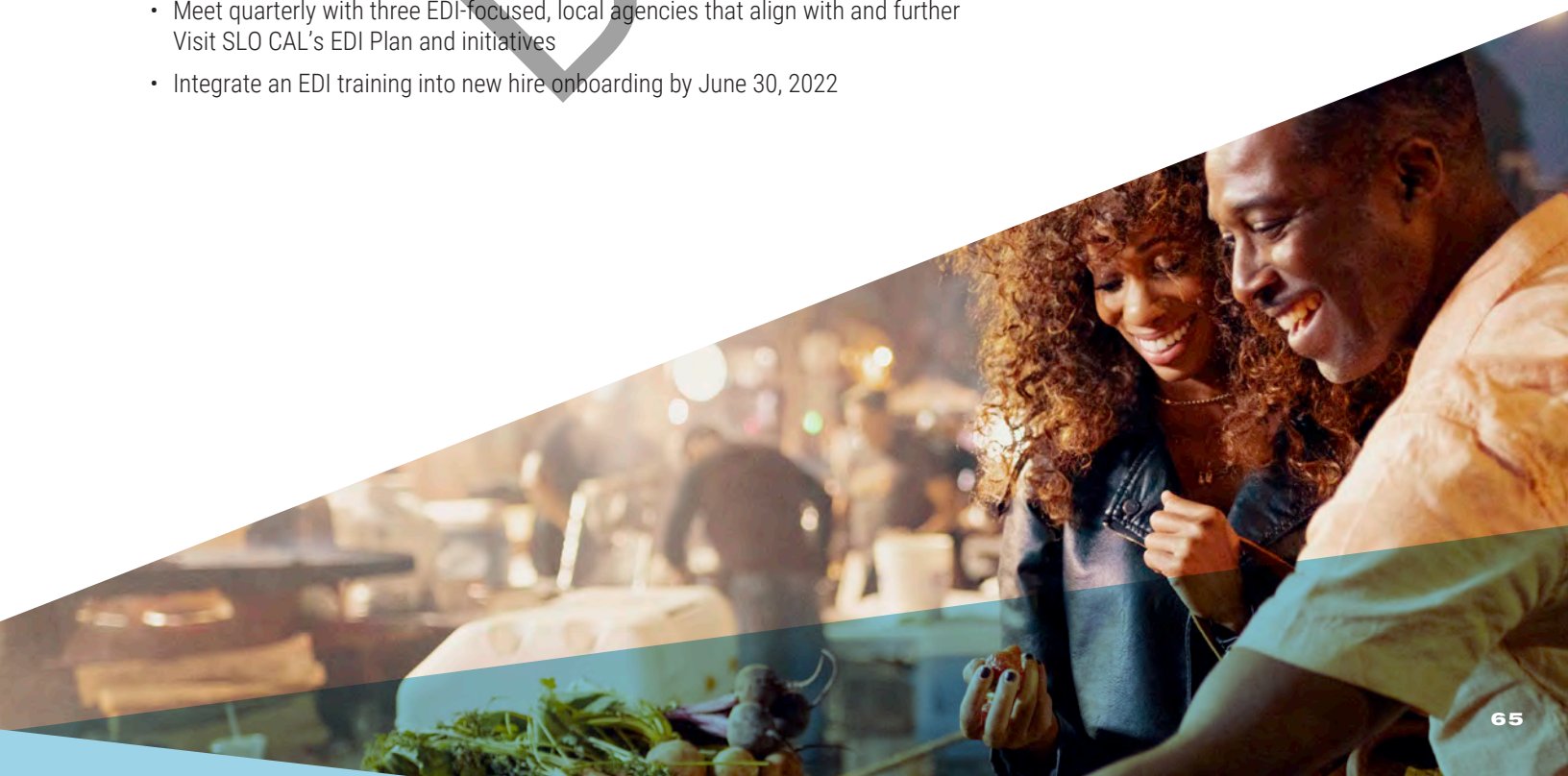
---

- Position Visit SLO CAL as a leader in the EDI travel and tourism space
- Identify SLO CAL's diverse assets and raise awareness of those assets in order to increase representation and inclusion
- Prioritize building relationships with EDI-focused local agencies such as R.A.C.E. Matters SLO and GALA Pride and Diversity Center to ensure VSC maintains an authentic and inclusive voice
- Maintain diverse representation on VSC's board, committees and team

## KEY RESULTS

---

- Complete EDI Audience and Asset Alignment Study by September 30, 2021
- Create EDI digital content strategy by September 30, 2021
- Complete social media campaigns for commemorative and heritage months to ensure an authentic representation of travel and tourism related businesses
- Meet quarterly with three EDI-focused, local agencies that align with and further Visit SLO CAL's EDI Plan and initiatives
- Integrate an EDI training into new hire onboarding by June 30, 2022



# ADVOCACY

**Visit SLO CAL's advocacy priorities were created to ensure the travel and tourism industry is represented on matters that impact the community. The industry's voice should be leveraged at all levels of government to ensure regulations and policies provide support and advancement for lodging investors and partners. The COVID-19 pandemic has disproportionately devastated the travel and tourism industry throughout the county, the state and the nation. VSC's efforts this year will continue to focus on providing relief that bolsters local hospitality businesses and supports a recovering travel industry.**

## STRATEGIES

---

- Continue to advance the Visit SLO CAL Advocacy Plan for local, state and federal legislation
- Continue to strengthen relationships with U.S. Travel Association, CalTravel and other strategic partners to stay informed on current state and federal legislation
- Leverage relationships with tangential, community-based organizations to partner on advocacy issues that increase residential quality of life and visitor experience
- Continue to build and foster relationships with elected officials and government partners to identify legislative pathways that are integral to building and maintaining a resilient destination

## OBJECTIVES

---

- Develop an advocacy pathway, toolkit and engagement opportunities for partners to share resources and ensure a united local advocacy voice on pertinent measures and regulations
- Position Visit SLO CAL as an advocacy leader for local travel and tourism industry partners and lodging investors
- Amplify Visit SLO CAL's voice with local, state and federal legislators and agencies
- Provide resources and communicate engagement opportunities so that partners may utilize their voices
- Increase awareness of Visit SLO CAL as a resource in order to develop and boost local advocacy efforts

## KEY RESULTS

- Host Advocacy Workshop in February 2022 to educate and promote advocacy tools and engagement opportunities
- Meet and onboard newly elected officials within their first 90 days of taking office
- Deliver Oceano Dunes Economic Impact Assessment data and analysis results by December 31, 2021; dictated by the results from the assessment
- Host biannual Hospitality Roundtable with state and federal legislative representatives
- Participate in U.S. Travel Destination Capitol Hill and CalTravel Advocacy Day
- Identify advocacy opportunities and provide the tools and resources needed for our investors and partners to effectively communicate their position on important travel and tourism related issues
- Deliver letters of support or opposition on policy issues that align with VSC's Advocacy Plan

## TRAVEL INDUSTRY RECOVERY AND RELIEF

In partnership with state and federal advocacy groups, VSC will continue to meet with the region's federal lawmakers to advocate for travel business relief, advance stimulus measures to drive travel demand, position the U.S. to welcome international visitors again, and restore business, meetings and events travel. As key items move through the legislative process, VSC will engage with lawmakers and encourage partners to share their voices on how restoring the travel economy is pivotal to SLO CAL.

To learn more about Visit SLO CAL's advocacy efforts or request action on a legislative item, contact [Advocacy@SLOCAL.com](mailto:Advocacy@SLOCAL.com).

# ENGAGE WITH VISIT SLO CAL

	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER
SALES	TRADESHOWS AND MISSION CO-OPS		IPW		
	ADDITIONAL TRADE SHOWS			RVIA California RV Show Vacation Rental Management Association's Annual Conference UK Sales Mission	National Tour Association Travel Exchange
EARNED	DOMESTIC MEDIA PITCHES	SHORT LEAD: Labor Day Escapes	SHORT LEAD: California Wine Month	SHORT LEAD: Fall Happenings	SHORT LEAD: Thanksgiving Retreats
		LONG LEAD: Holiday Travel	LONG LEAD: Animal Migrations	LONG LEAD: Weddings & Romance	LONG LEAD: Pet-Friendly Destinations
	GROUP FAM TOURS				Media FAM
PAID	ADVERTISING & MEDIA	Life's Too Beautiful to Rush Mural Project			
		CrowdRiff			
		SLOCAL.com Advertising			
		SLO CAL Visitor Magazine Advertising			
PARTNERSHIP	PARTNERSHIP OPPORTUNITIES AND LOCAL EVENTS	House of Brands Photoshoot + Video Co-op			
OWNED	CONTENT STORIES PARTNERS: ALL	Summer Holidays	Harvest SLO CAL	Hispanic Heritage Month	Native American Heritage Month
				SLO CAL Wine Month	SLO CAL Crafted®
EVENTS	TOURISM INDUSTRY		U.S. Travel Association ESTO	CalTravel Summit	



Visit SLO CAL is your partner in promotion, education and collaboration, working on behalf of the entire community to elevate the positive impact and perception of the tourism industry in SLO CAL. Take advantage of VSC's investment in marketing, sales, media and film promotion by getting involved today. Below you'll find a calendar full of ways to engage with VSC throughout the year. Attend trade shows to grow your business. Participate in free co-ops throughout the year. Share your business with top national and international media by hosting press or sharing your stories. Visit SLO CAL is all about you—so get involved today!

DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
CalSAE Seasonal Spectacular	Tour & Travel Winter Sales Mission		Meeting Professionals International Northern CA Expo			IPW
Meeting & Conference Sales Mission			Meeting & Conference Sales Mission			
		Go West Summit				
SHORT LEAD: Wellness	SHORT LEAD: Romantic Getaways	SHORT LEAD: Spring Break Travel	SHORT LEAD: Scenic Drives	SHORT LEAD: Mother's Day Escapes	SHORT LEAD: Coolest Pools	SHORT LEAD: Fourth of July
LONG LEAD: Sustainability & Eco-Road Trips	LONG LEAD: Family Summer Getaways	LONG LEAD: Best Beaches	LONG LEAD: Vineyards & Villas	LONG LEAD: Outdoor Adventure	LONG LEAD: Culinary	LONG LEAD: Spa & Wellness (Sept. is National Yoga Month)
	Media FAM	Media FAM				
Life's Too Beautiful to Rush Mural Project						
CrowdRiff						
SLOCAL.com Advertising						
				Brand Refresh Pop-up Activation		
Enhanced Listings on SLOCAL.com						
Access to SLO CAL Connection						
SLO CAL Crafted®						
	SLO CAL Restaurant Month	Industry Educational Symposium				
Persons with Disabilities Day	Restaurant Month	Black History Month	Women's History Month	Earth Day	AAPI Month	Pride
					Bike Month	
Holiday	National Plan for Vacation Day	Valentine's Day	Easter Prep	Beer Day	Tourism Month	Father's Day
			SLO CAL in Bloom		Mother's Day	
		Visit California Outlook Forum		U.S. Travel Association Destination Capitol Hill	CA Tourism Month National Travel & Tourism Week	
					CalTravel Advocacy Day	



# ENGAGE WITH VISIT SLO CAL (CONTINUED)

## SALES

Visit SLO CAL provides opportunities for lodging investors and partners to build relationships and increase exposure through participation in industry trade shows, sales missions and familiarization tours, and through SLOCAL.com. For more information on the opportunities below, please visit SLOCAL.com/Partners or email [Sales@SLOCAL.com](mailto:Sales@SLOCAL.com).

## TOUR & TRAVEL

VSC works with tour operators to connect them with all the best venues, accommodations, dining options, activities and service providers SLO CAL has to offer.

### **Tour & Travel Familiarization (FAM) Tours | Ongoing**

FAM tours acquaint tour operators and receptives with SLO CAL's many destinations and experiences. Host participants at your business to gain valuable exposure for future group bookings.

### **Tour & Travel Sales Missions | January 2022 | 3 Lodging Investors/Destination Partners | \$250**

Join Visit SLO CAL on a sales mission to southern California. Visit tour operators and inbound receptives from SLO CAL's top markets. Partners will meet with tour companies to build relationships and gain potential sales opportunities.

### **IPW | June 4 - 8, 2022 | 5 Lodging Investors/Destination Partners | \$4,500**

Join Visit SLO CAL as a booth partner at IPW, the largest Tour and Travel trade show in North America. During the three-day trade show in Orlando, Florida, co-op partners meet and network with tour companies from SLO CAL's top markets. Co-op partner participants will have exclusive access to all notes and leads for 30 days following the show before those leads are distributed to lodging investors countywide.

## MEETINGS & CONFERENCES

With something for everyone, SLO CAL makes the ideal setting for a variety of different meetings throughout the destination. Visit SLO CAL's dedicated sales department works directly with organizations and third-party meeting planners to create opportunities for lodging investors to host meetings.

### **CalSAE Seasonal Spectacular | December 2021 | 5 Lodging Investors/Destination Partners | \$1,000**

Meet with over 30 meeting and event planners in Visit SLO CAL's destination booth.

### **Meeting & Conference Sales Missions | December 2021 & March 2022 | 3 Lodging Investors/Destination Partners | \$250**

Travel with Visit SLO CAL to northern California to meet in person with meeting planners to learn how your property can help it achieve its event goals and objectives.

### **MPI ACE | March 2022 | 5 Lodging Investors/Destination Partners | \$1,000**

Meet in person with over 30 meeting and event planners in Visit SLO CAL's destination booth.

## RV PARKS

### **RV Industry Association (RVIA) California RV Show | October 1 - 10, 2021**

Visit SLO CAL attends the California RV Show to showcase SLO CAL as a diverse recreation destination. RV Park investors can provide VSC with promotional materials to be distributed at the show and are given the opportunity to increase awareness through sweepstakes.



## MARKETING AND PR

Visit SLO CAL provides a variety of different marketing opportunities that are tailored to partners' specific goals. For more information on the opportunities below, please visit [SLOCAL.com/Partners](https://SLOCAL.com/Partners) or email [Marketing@SLOCAL.com](mailto:Marketing@SLOCAL.com).

### **CrowdRiff | All Partners**

CrowdRiff allows organizations to effectively discover and activate engaging visual content from the social web, while inspiring conversations with potential visitors. In addition, CrowdRiff provides Visit SLO CAL the ability to increase overall social and digital efficiency and deliver content through marketing channels. Partners can buy in to use this technology for their own photo and video galleries at a cost of \$6,000 to \$10,000 depending on necessary storage capacity.

### **House of Brands Photoshoot + Video Co-Op | Destination Partners | July - August 2021**

This co-op allows destination partners to create refreshed assets within the new SLO CAL brand campaign creative while procuring a source to develop their own assets. The co-op will include one :15 video asset and three :06 video assets, still image library and raw source footage. If a participating partner wants to capture additional footage and/or still assets for their own library, Visit SLO CAL will work with Mering to ensure the second crew works directly with the destination partner on obtaining those assets at an additional cost. Costs will be outlined based on need.

### **Life's Too Beautiful to Rush® Mural Trail | Destination Partners**

This ongoing project will brighten and beautify the communities while incentivizing Instagrammable public art murals to encourage visitors and locals to tag @slocal on their social media channels. Visit SLO CAL will celebrate the Life's Too Beautiful to Rush motto and amplify brand awareness by identifying existing murals and commissioning artists to create murals in major SLO CAL communities.

### **Brand Refresh Pop-Up Activation | Destination Partners | April 2022**

Visit SLO CAL will partner with Mering to launch a brand refresh activation event in either one of its drive markets (SF, LA or SD) or out-of-state fly markets (Portland, Seattle, Dallas, Denver, Phoenix) as VSC works to attract travel consumers during the post-pandemic recovery. VSC will showcase the rollout of key initiatives, including Xplorit unveil the new website and invite media, trade partners and social media influencers to experience all that SLO CAL has to offer.

### **Featured Listing on SLOCAL.com | Non-Lodging Partners**

All partners receive a free enhanced listing that allows for businesses to provide information as well as photos and detailed description—plus website link, social media links, events integration, special offers, amenities, booking link for OpenTable and optional TripAdvisor and/or Yelp integration. A featured listing allows for the benefits included in the enhanced listing while also sorting the partner's listing at the top of the industry set, as well as an eye-catching featured banner. For more information, please contact [advertising@dttnads.com](mailto:advertising@dttnads.com).

### **Official Visitors Magazine | Lodging Investors & Non-Lodging Partners**

Lodging investors and non-lodging partners have the opportunity to advertise in Visit SLO CAL's annual Official Visitors Magazine. Production is expected to begin in August 2021. Please reach out to [Marketing@SLOCAL.com](mailto:Marketing@SLOCAL.com) if you are interested in purchasing an advertisement.

### **Opportunities to Be Featured on Visit SLO CAL Owned Channels**

Throughout the year, Visit SLO CAL executes an array of promotions based on seasonality, events and holidays and is constantly looking for content, imagery and videos to share. Keep up to date with VSC content needs via SLO CAL's weekly industry email, This Week in SLO CAL.

# ENGAGE WITH VISIT SLO CAL (CONTINUED)

## FILM SLO CAL

Film SLO CAL is the film commission for the County of San Luis Obispo and the point of contact for film projects in SLO CAL. Visit SLO CAL has a private directory featuring properties of all types to assist producers in finding the perfect backdrop for commercials, television specials, feature films and more. If you have a house, farm, vineyard or open space that you would like to add to the Film SLO CAL directory, you can be considered for productions that match what you have to offer. Provide VSC with as much information as possible about your film-worthy spot so you can be part of an upcoming Film SLO CAL production. For more information on opportunities to engage with Film SLO CAL, visit [FilmSLOCAL.com](http://FilmSLOCAL.com) or email [Film@FilmSLOCAL.com](mailto:Film@FilmSLOCAL.com).

### Film Scout Familiarization (FAM) Tours

Visit SLO CAL hosts filmmakers, producers, film crews and consumers on familiarization tours to introduce them to the destination. If you are interested in showcasing your venue, send your information to [Film@FilmSLOCAL.com](mailto:Film@FilmSLOCAL.com).

## PUBLIC RELATIONS

Visit SLO CAL works with domestic and international journalists on SLO CAL travel stories with angles that are both timely and relevant to today's travel market. In market, VSC provides investors and partners with the opportunity to participate in media familiarization (FAM) tours in exchange for coverage. For more information on the opportunities below, please visit [SLOCAL.com/Partners](http://SLOCAL.com/Partners) or reach out to [Media@SLOCAL.com](mailto:Media@SLOCAL.com).

### Familiarization (FAM) Tours & Individual Press Trips

FAM tours and individual press trips familiarize journalists with SLO CAL's many destinations and experiences. Host journalists at your business to gain valuable media exposure.

### Media Pitches & Leads

Respond to media pitches and leads in partnership with Visit SLO CAL, Visit California and TURNER PR through SLO CAL Connection, Visit SLO CAL's extranet system.

## DATA INSIGHTS

Visit SLO CAL has long been committed to collecting, analyzing and sharing information to ensure a high-functioning and collaborative Travel and Tourism industry in SLO CAL. Hotel performance data through STR, visitor volume and insightful Business Intelligence Reports are made available to lodging investors, partners and stakeholders through SLO CAL Connection.

### Business Intelligence Reports | Monthly

VSC has partnered with Tourism Economics to offer a first-of-its-kind data and insights dashboard available to all lodging investors, partners and stakeholders. This monthly dashboard aggregates community-specific and countywide data from sources such as STR, VisaVue, Arrivalist and others, providing necessary information to plan for the future of communities and a benchmark of how the Travel and Tourism industry is performing in communities.

### COVID-19 Recovery Tracker | Monthly

Visit SLO CAL has partnered with Tourism Economics to develop and refine a new monthly report focused specifically on the SLO CAL tourism industry's COVID-19 recovery and how it compares with its competitive set, California and the U.S. as a whole.

DRAFT



## ADVOCACY

Visit SLO CAL advocates at local, state and national levels to ensure that the tourism industry's voice is represented on issues that matter to its community of lodging investors and partners, and that the industry's views and wishes are genuinely considered on issues that impact the industry. For more information on the advocacy opportunities below, please visit [SLOCAL.com/Partners](https://SLOCAL.com/Partners) or reach out to [Advocacy@SLOCAL.com](mailto:Advocacy@SLOCAL.com).

### **U.S. Travel Association | Destination Capitol Hill | April 2022**

Visit SLO CAL participates with the U.S. Travel Association in their annual Destination Capitol Hill, an opportunity for Travel and Tourism industry professionals from across the country to visit Washington D.C. and advocate on behalf of the industry and their community. This event includes scheduled meetings with members of Congress and the president's administration. Anyone from the Travel and Tourism industry is welcome on these trips. Registration can be completed through the VSC team to ensure a discounted rate.

### **CalTravel | Tourism Advocacy Day | TBD 2022**

Visit SLO CAL participates in Tourism Advocacy Day with CalTravel, the state advocacy association representing the Travel and Tourism industry. This two-day event takes place in Sacramento, with an advocacy training session, meetings with members of the state legislature and an annual PAC dinner. Anyone from the Travel and Tourism industry is welcome on these trips. Registration can be completed through the VSC team to ensure a discounted rate.

## PARTNERSHIP

### **Enhanced Listings on SLOCAL.com | All Partners | No Charge**

All partners have access to a free enhanced listing on SLOCAL.com, which allows businesses to provide a more detailed business description, photo gallery, website link, social media links, events integration, special offers, amenities, booking link for Booking.com or OpenTable and optional Trip Advisor and/or Yelp integration.

### **SLO CAL Connection | All Partners | No Charge**

Visit SLO CAL works to represent lodging investors and all tourism related businesses, providing guests with relevant information about our destination. SLO CAL Connection is your way to take control of your free online listing, access the most recent tourism research, respond to media and sales leads, view coverage you have been featured in and network with your community.

To sign up for a SLO CAL Connection account, visit [SLOCAL.com/Partners](https://SLOCAL.com/Partners) or reach out to [Partnership@SLOCAL.com](mailto:Partnership@SLOCAL.com).

### **SLO CAL Crafted®**

SLO CAL Crafted celebrates the quality, local products made, farmed and grown in SLO CAL. Partner requirements include being headquartered in SLO CAL, with primary design and manufacturing done in SLO CAL, as well as products sold through brick and mortar or retail locations in SLO CAL. Partners will be given opportunities for additional exposure by certifying as SLO CAL Crafted (at no charge) through a form that can be found on Visit SLO CAL's website.

### **SLO CAL Restaurant Month | Restaurants | No Charge**

All restaurant partners are able to participate free of charge in SLO CAL's annual Restaurant Month, taking place the entire month of January. Restaurants will be featured on SLO CAL's Restaurant Month landing page and printed collateral, and given opportunities for additional exposure through giveaways and on SLO CAL's blog and Instagram. A program strategy outlining participation specifics will be shared in September 2021.



# FUTURE ITEMS FOR CONSIDERATION



As the industry recovers and FY 2022 initiatives progress, Visit SLO CAL will be nimble and address additional opportunities to market and manage the destination as those opportunities become feasible.



# EXPERIENCE SLO CAL 2050 RECOMMENDATIONS

## AUTHENTIC COMMUNITIES

---

Visit SLO CAL will continue advocating alongside municipal and county governments to preserve the authenticity of each community. In addition, VSC will work with those communities that are hoping to develop and grow their experiences and those that are looking to better understand and implement tourism management practices.

## INTERNATIONAL VISITORS

---

Visit SLO CAL will reestablish and expand its representation abroad, attracting international visitors via Travel Trade and public relations efforts. VSC will launch international readiness programs to help the industry be better prepared for international travelers.

### **Sales & Public Relations**

Visit SLO CAL's presence in the international marketplace was significantly impacted in FY 2021 due to the COVID-19 crisis. As the world continues to reopen, VSC will reengage in international public relations representation and sales programs in the UK and Ireland, as well as sales programs in Canada and Mexico. Until then, through the following strategies, VSC will continue to nurture and grow relationships with international travel buyers in key markets to ensure SLO CAL is top of mind.

- Partner with Visit California on virtual sales opportunities and itinerary distribution
- Proactive outreach to and prospecting of international tour operator companies in key markets
- Serve as a liaison between wholesalers and receptive operators to ensure bookable product is available throughout SLO CAL's top markets

## VICE PRESIDENT OF HOSPITALITY COMMUNITY INVESTMENT

---

Visit SLO CAL will work with a consultant to develop the scope of work in preparation for the hire of a Vice President of Hospitality Community Investment. The consultant, once selected, will assist in the development of the job description and Objectives and Key Results for the role. The consultant will work with local municipalities and county government, in concert with regional strategic partners, to establish a portfolio of hospitality and tourism investment opportunities to be shared with possible investors and will also develop a schedule of essential investment conferences. The role, once created, will be responsible for representing SLO CAL and presenting potential investment opportunities to investors across the country and around the globe.

**SLOCAL.COM**

805.641.8000



SLOCAL



@VisitSLOCAL



@SLOCAL

San Luis Obispo County  
Visitors & Conference Bureau  
FY 2022 Budget

	Total 21/22 Budget	Total 20/21 Projected	Variance \$	Percent Change YOY
<b>Income</b>				
Web & Ticket Revenue	\$ 24,956	\$ 10,311	\$ 14,645	142%
Co-op Revenue	\$ 191,724	\$ 252	\$ 191,472	75981%
Interest Income	\$ 12,348	\$ 4,400	\$ 7,948	181%
<u>TMD Income</u>		\$ -		
Collected from Prior Year Assessments	\$ 266,173	\$ 111,509	\$ 154,664	139%
Arroyo Grande	\$ 172,951	\$ 106,520	\$ 66,431	62%
Atascadero **	\$ 210,026	\$ 132,961	\$ 77,065	58%
Grover Beach	\$ 67,302	\$ 41,987	\$ 25,315	60%
Morro Bay	\$ 576,027	\$ 370,764	\$ 205,263	55%
Paso Robles	\$ 1,049,048	\$ 526,804	\$ 522,244	99%
Pismo Beach	\$ 1,747,867	\$ 1,539,842	\$ 208,025	14%
City of San Luis Obispo	\$ 1,261,605	\$ 810,251	\$ 451,354	56%
Unincorporated SLO County	\$ 2,163,250	\$ 1,248,440	\$ 914,810	73%
Adjustment for Actual TMD Collected		\$ 1,498,231	\$ (1,498,231)	-100%
<b>Total TMD Income</b>	<b>\$ 7,514,249</b>	<b>\$ 6,387,309</b>	<b>\$ 1,126,940</b>	<b>18%</b>
<b>Total Income</b>	<b>\$ 7,743,277</b>	<b>\$ 6,402,272</b>	<b>\$ 1,341,005</b>	<b>21%</b>
** District pays quarterly				
<b>Expenses</b>				
Contingency Reserve	\$ 376,192	\$ 745,725	\$ (369,533)	-50%
G&A	\$ 419,463	\$ 275,478	\$ 143,985	52%
Industry Research and Resources	\$ 506,422	\$ 204,237	\$ 302,185	148%
Travel Trade	\$ 544,096	\$ 239,071	\$ 305,025	128%
Communications	\$ 298,159	\$ 258,816	\$ 39,343	15%
Advertising	\$ 5,200,780	\$ 2,855,525	\$ 2,345,255	82%
Promotions & Events	\$ 291,681	\$ 75,948	\$ 215,733	284%
Digital Marketing	\$ 703,282	\$ 419,530	\$ 283,752	68%
Film Commission	\$ 20,895	\$ 8,101	\$ 12,794	158%
Engagement & Advocacy	\$ 712,079	\$ 352,849	\$ 359,230	102%
<b>Total Expenses</b>	<b>\$ 9,073,050</b>	<b>\$ 5,435,280</b>	<b>\$ 3,637,770</b>	<b>67%</b>
<b>Surplus(Deficit)</b>	<b>\$ (1,329,772)</b>	<b>\$ 966,992</b>	<b>\$ (2,296,764)</b>	<b>-238%</b>
<b>FY 2021 Estimated Surplus (Based on Surplus Income, July-May Actuals &amp; Estimated June Expenses)</b>	<b>\$ 1,664,863</b>			
<b>FY 16- FY 20 Surplus Available to Cover Deficit</b>	<b>\$ 1,130,000</b>			
<b>Total Prior Years' Surplus Available to Cover Deficit</b>	<b>\$ 2,794,863</b>			
<b>Remaining Carryover</b>	<b>\$ 1,465,091</b>			

**Notes:**