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Letter From the President & CEO

Dear Visit SLO CAL Investors, Partners & Stakeholders,



As I reflect on the past year and look toward the future, I am extremely proud of the work our team, the organization and our tourism community have accomplished. We brought SLO CAL's sustainability efforts to the international stage in partnership with the World Travel & Tourism Council, developed and launched a customer service program specifically for our industry, finalized a countywide Events & Festivals Strategy that will establish efficiencies and create economic growth during need periods, facilitated our largest and most successful branding campaign to date, increased air service seats to our community and competed on the worldwide stage for luxury travelers by hosting Visit California's Luxury Forum. With a growing staff, we are poised to bring and steward more opportunities, responsibly growing tourism in the years ahead.

Our recently approved Strategic Direction 2026 provides the roadmap, and our north star, for the next three years. In the pages ahead, you will see the first year of that three-year plan come to life as we focus on FY 24. Key to the success of Visit SLO CAL as an organization, and SLO CAL as a destination, is effective brand messaging and positioning. Building upon the House of Brands strategy, we will lean into our destination partners, continuing to grow awareness and demand for the travel product across the region. New UK sales and media representation will give fresh perspective to SLO CAL as an inbound travel destination. These voices join our existing partners, The Shipyard, Pensara and MMGY NJF, to help tell the SLO CAL story domestically and internationally. We'll develop a new and more robust countywide sales strategy focused on increasing demand during non-peak periods and diversifying our sales mix. In the area of destination management, we'll advance a plan to establish a countywide trail system, create a regional tourism industry workforce strategy, partner with the Global Sustainability Tourism Council to assess the destination and advance our air service development strategy. Working in synergy, these initiatives will allow SLO CAL to continue to punch above our weight as a tourism destination.

With this plan, investors, partners and stakeholders can expect Visit SLO CAL to continue delivering impactful work aimed at maintaining and improving resident quality of life, stewarding the natural resources of SLO CAL and elevating our hospitality industry. Your partnership and support have helped us grow the SLO CAL brand, and we look forward to advancing those efforts collectively in the coming year.

Together we can,

Chuck Davison, CDME

President & CEO, Visit SLO CAL

Strategic Direction 2026

Vision

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

Mission

Inspire travel, foster our unique experiences, and champion quality of life to create lifelong ambassadors and economic growth for SLO CAL

Core Values

STEWARDSHIP

We value our people and care for our community and resources

AUTHENTICITY

We strive to embody the SLO CAL lifestyle of "people, place and pace"

INCLUSION

We engage and collaborate with an array of voices and perspectives

EXCELLENCE

We are ambitious in our work and prioritize initiatives to achieve results

FUTURE FOCUS

We deliver today with an innovative eye on tomorrow

Objectives

Enhance our organizational effectiveness

Amplify and steward the SLO CAL brand through unified efforts

Lead the county tourism industry in fostering a vibrant destination

Demonstrate value to investors, partners, stakeholders and communities

To read the complete Strategic Direction 2026 plan, visit <u>SLOCAL.com/about-us</u>.

Aligning the Vision

Strategic Direction 2026 serves as Visit SLO CAL's north star. The Operational Plan and Experience SLO CAL 2050, the organization's destination management strategy, works 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.





HOW WILL WE KNOW WE ACHIEVED OUR DESIRED RESULTS?

PROJECT MANAGEMENT TRACKING

OKR & GOAL PERFORMANCE

FINANCIAL RESULTS

Business & Marketing Plan

Future Focused: Roadmap to 2026

Visit SLO CAL has defined four overarching organizational objectives in Strategic Direction 2026 including strategies and measurable key results. The fiscal year 2024 (FY 24) Strategies and Key Results for each department ladder up to these objectives.



Objective 1

Enhance our organizational effectiveness

STRATEGIES

- Audit and streamline processes, procedures and workflows
- Cultivate a values-centered culture reflective of the SLO CAL lifestyle
- Perform a skills and capabilities audit and act on the findings
- Celebrate, recognize and develop the Visit SLO CAL team

KEY RESULTS

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

Objective 2

Amplify and steward the SLO CAL brand through unified efforts

STRATEGIES

- Continue to build on House of Brands marketing strategy
- Increase share of voice through integrated storytelling efforts
- Increase local adoption of SLO CAL nomenclature
- Develop a holistic approach to promoting SLO CAL as an authentically sustainable destination

KEY RESULTS

- Year-over-year increase in unaided visitor Net Promoter Score from baseline of –9
- Grow incremental travel impact as measured by return on ad spend (ROAS) in the annual Brand Awareness Study
- Grow partner participation in Visit SLO CAL marketing efforts
- · Increase cross-visitation over FY 2024 baseline

Objective 3

Lead the county tourism industry in fostering a vibrant destination

STRATEGIES

- Champion improvements in intracounty transportation
- Develop a Sustainable Tourism Strategy for SLO CAL
- Create a Regional Tourism Industry Workforce Plan

KEY RESULTS

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

Objective 4

Demonstrate value to investors, partners, stakeholders and communities

STRATEGIES

- Build awareness and deepen engagement of investors, partners and stakeholders
- Build local understanding of the positive impact tourism has on the community
- Advance our efforts to educate, inform and collaborate with our investors, partners and stakeholders

KEY RESULTS

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

7

Strategic & Industry Partners

As one of four key imperatives in Strategic Direction 2026, Visit SLO CAL (VSC) believes that fostering a vibrant destination is fundamental to the overall success of the region. VSC is part of a dynamic ecosystem of industry and business partners, and key regional, strategic and community-based organizations and government stakeholders who work collaboratively to identify critical issues and promote policies designed to improve resident quality of life and the visitor experience. The FY 24 scope of work focuses on key initiatives outlined in Experience SLO CAL 2050 while identifying other pathways that are integral to building and maintaining a vibrant SLO CAL.

Objectives

- Continue engagement in community groups to understand issues and strengthen impact by advancing partnerships with a shared focus on economic vibrancy and resident quality of life
- Partner and collaborate with key stakeholders and local agencies to advocate on issues that advance 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
- Educate the community on the value of tourism to resident quality of life

Strategies

- Create a unified effort to explore opportunities and overcome challenges around building a vibrant SLO CAL
- Strengthen Visit SLO CAL's impact on and in the community through civic engagement opportunities
- Position Visit SLO CAL as a community leader in addition to being a leading voice for the 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



VIBRANT DESTINATION



Key Results

- Meet with key strategic partners, community based organizations and community stakeholders quarterly to explore collaboration and advance shared initiatives surrounding economic development and resident quality of life
- Launch community engagement plan by August 30, 2023, to build local awareness of the positive impact tourism has on the community and create and benchmark deliverables by September 30, 2023
- Leverage FY 23 resident sentiment benchmark to inform and build a communications strategy by December 31, 2023, to increase local understanding of the positive impact tourism has on the community
- Advance Air Service plan in partnership with SBP and Volaire Aviation by June 30, 2024

Destination Partners

Representing the voice of the larger community, VSC 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 cascade those down to local communities. Having a seat at the table allows VSC to leverage opportunities in larger advocacy, marketing and sales initiatives while maximizing human and financial capital.

BRAND USA

VISIT CALIFORNIA

VISIT SLO CAL

DESTINATION PARTNERS

TOURISM BUSINESSES

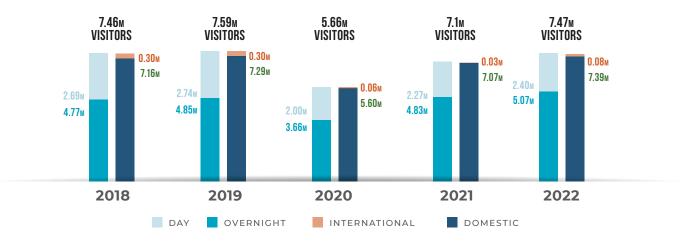
Key Moments FY 23

- In July 2022, Visit SLO CAL worked with Heart+Mind Strategies to conduct a Brand Awareness Study to assess awareness of the SLO CAL brand advertising. The study found nearly one in 10 travelers in key media markets recall seeing our ads and 97 percent had a favorable impression, indicating the value in continuing The Land of... messaging.
- In September 2022, Visit SLO CAL developed a new The Land of... storytelling strategy, connecting activities and experiences across the region by juxtaposing a popular/known activity with a less known but enticing opportunity. These creative assets were developed to resonate with key visitor segments, ultimately increasing visitation between communities.
- SLO CAL was chosen to host the Visit California Luxury Forum in October 2022, bringing 40 luxury buyers to the region from across the world. The event included 40 suppliers from throughout California and brought SLO CAL to life through 33 unique experiences.
- In October 2022, based on outcomes of Visit SLO CAL's partnership with the San Luis Obispo County Regional Airport and the advancement of the joint air service strategy, American Airlines upgauged Dallas/Fort Worth service from the 78-seat regional jet to San Luis Obispo County's first scheduled commercial airbus service on a 128-seat A319. In April 2023, American Airlines also upgauged the Phoenix service to the A319.
- In November 2022, Visit SLO CAL launched SLO CAL Welcome, a first-of-its kind customer service training program developed specifically for SLO CAL's Travel & Tourism industry. The program was designed as a resource for tourism and hospitality businesses, providing customer-facing employees the knowledge and tools needed to become experts in customer service and provide enhanced guest experiences. This program, part of Experience SLO CAL 2050, was a countywide collaborative effort and will continue as a valuable resource to assist with increased customer satisfaction across SLO CAL.
- In March, the World Travel and Tourism Council featured SLO CAL in a Destination Spotlight Video Series showcasing the development and growth in sustainable practices throughout the region. The four-part series included 15 partners and 12 locations in SLO CAL. This partnership brought attention to SLO CAL on the global stage through social, website and editorial features linking back to local businesses and communities.
- In March, Visit SLO CAL developed and finalized Strategic Direction 2026 after soliciting input from key investors, partners and stakeholders. This three-year strategy provides a roadmap for work being done throughout the organization to benefit the community as a whole.
- In March, the board of directors approved the Events & Festivals Strategy, a strategy for tourism-related events and festivals. This countywide collaborative effort, part of Experience SLO CAL 2050, provides tools and resources to assist local communities in growing midweek and off-peak visitation while maintaining and improving resident quality of life.

Data Insights & Trends

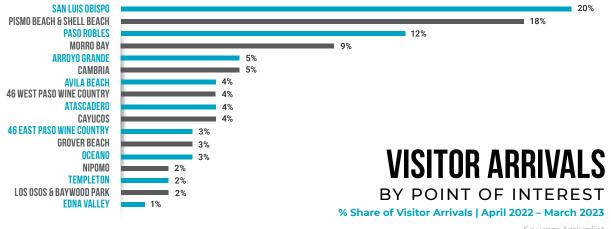
As an organization rooted in data and analytics, VSC understands the value of collecting, analyzing and sharing the latest data insights with the tourism industry.

FIVE YEAR VISITOR TREND

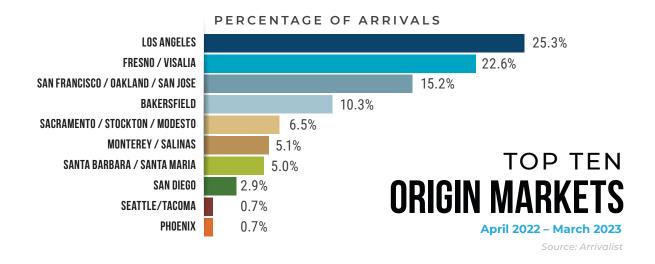


Sources: Arrivalist, Tourism Economics





Source: Arrivalist



CROSS-VISITATION

COMMUNITIES PER UNIQUE ARRIVAL

April 2022 - March 2023

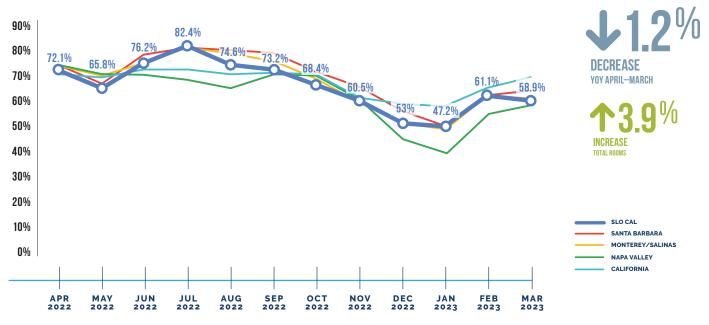
LENGTH OF STAY

DAYS

April 2022 - March 2023

Data Insights & Trends Continued

HOTEL OCCUPANCY (OCC)

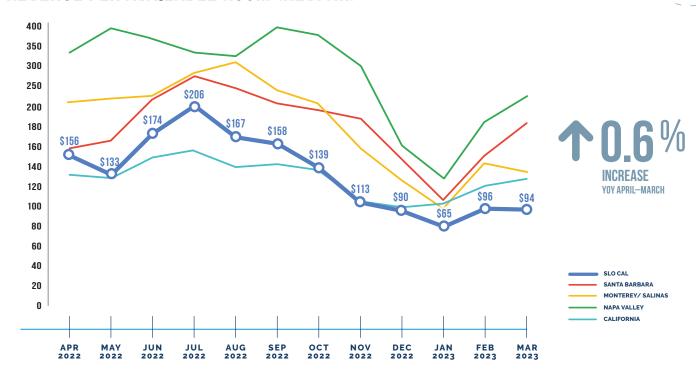


Sources: STR, Tourism Economics

AVERAGE DAILY RATE (ADR)

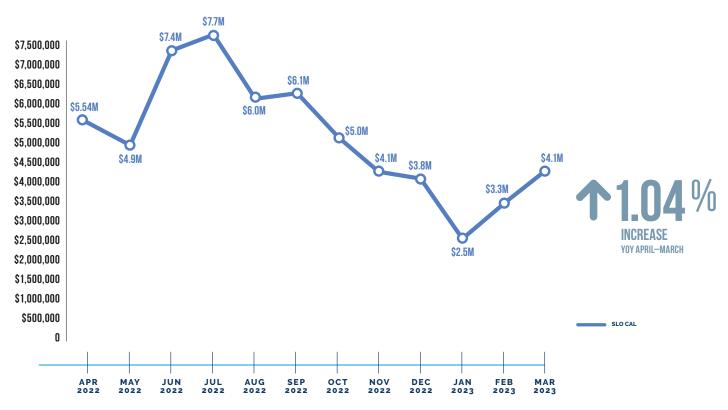


REVENUE PER AVAILABLE ROOM (REVPAR)



Sources: STR, Tourism Economics

TRANSIENT OCCUPANCY TAX (TOT)



Why Tourism Matters



TRAVEL SPENDING

\$5.9M a day

\$248K an hour

\$**4.1**K

\$68 a minute a second



INDUSTRY EARNINGS



TOURISM PUTS



RESIDENTS TO WORK EACH DAY

TOURISM CONTRIBUTES

IN TRANSIENT OCCUPANCY TAX REVENUE

WITHOUT VISITORS EACH SLO CAL HOUSEHOLD

WOULD NEED TO SPEND \$ **AN ADDITIONAL**

TO CREATE THE SAME ECONOMIC BENEFIT for the community

> WITHOUT STATE & LOCAL TAX REVENUE **GENERATED BY TRAVEL & TOURISM**

EACH SLO CAL HOUSEHOLD WOULD



PAY AN ADDITIONAL

DIRECT SPENDING BY SECTOR



IN LOCAL **TAX REVENUE** which could cover the expenses for

36 POLICE OFFICERS'

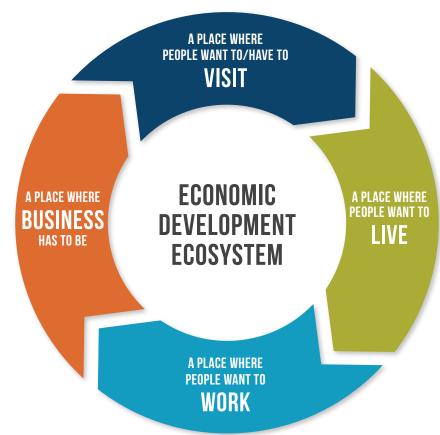
757 FIREFIGHTERS'

OR

186 MILES OF 2-LANE RESURFACED ROADS

January – December 2022 Sources: Visit SLO CAL, "The Economic Impact of Travel in California" from Dean Runyan Associates, Bureau of Economic Analysis, United States Census Bureau, U.S. Bureau of Labor Statistics, Tourism Economics





Tourism Trends

As reported by the State of the American Traveler 2023, the top motivators for travelers include spending quality time with loved ones, creating memories, experiencing new places, escaping the pressures of daily life and recharging. Second-tier motivators include connecting with nature, visiting places of historical significance, food and a chance to expand one's own perspective. These forces for travel motivation are well aligned with the SLO CAL experience and point to a continued desire for the region's distinct brand promise.

Other trends reported by Booking.com research conducted with 24,000 travelers across 32 countries present a range of opportunities for Visit SLO CAL marketing in FY 24 and beyond.

"Lisness"

The experts at Black Tomato have noticed a paradigm shift of "Bleisure," where travelers tack on a few extra days of fun at the end of a business trip. Now there's a reversal, dubbed "Lisness," which is driven by travelers planning leisure trips with time for work.

SLO CAL OPPORTUNITY

As a popular leisure getaway for Los Angeles and San Francisco, Visit SLO CAL will look to capitalize on this trend through targeted pitching and content development that positions the region as a great option to extend a stay and make work "too beautiful to rush."

High-End Sustainable Travel

The luxury tourism market is booming, and at the same time the threat of climate change is an increasingly dire issue. Travelers' desire to explore the planet in a way that protects the places they love for future generations is strong, particularly among affluent consumers. According to Virtuoso, travelers are willing to visit a popular destination during its off-season or opt for an alternative, less-touristed destination.

SLO CAL OPPORTUNITY

Visit SLO CAL hosted Visit California's Luxury
Forum in October 2022 and partnered with the
World Travel & Tourism Council to feature SLO CAL
in a Destination Spotlight Video Series showcasing
the development and growth in sustainable
practices throughout the region. These endeavors
provide a platform for future integrated
programming that will cement SLO CAL's place as
a leading sustainable travel destination.





Electric Road Trips

Mass production of Tesla's futuristic-looking electric Cybertruck will begin this year, and it will rapidly become one of the coolest vehicles to take on an electric road trip.

SLO CAL OPPORTUNITY

Visit SLO CAL has developed online content that highlights the existing network of electric vehicle charging and supercharging stations across the region. By creating and promoting resources for prospective travelers to help ease range anxiety and provide trip planning resources, Visit SLO CAL continues to provide solutions that emphasize the sustainability as a core brand value while promoting cross-visitation and the ease of sustainable travel across the region.

Transformation Retreats

After a year of travel for fun, relaxation and reunion post-pandemic, this will be the year people travel for personal betterment. Whether they are seeking to overcome grief, identify a life's mission or discover their own physical abilities and strengths, there will be a transformation retreat that caters to it.

SLO CAL OPPORTUNITY

SLO CAL offers a plethora of transformation possibilities from the Spartan Race to yoga retreats to nature bathing, which provides rich content potential for owned and earned media channels.

Food & Beverage Go Green

Kelp, no/low ABV and immersive experiences are trending. Whole Foods named kelp as one of its top food trends because it's a sustainable ingredient that absorbs carbon in the environment, grows quickly, doesn't require freshwater and is incredibly nutritious and versatile.

SLO CAL OPPORTUNITY

Visit SLO CAL's investment in SLO CAL Crafted video content featuring Kelpful allows for storytelling extensions to leverage this trend whether collaborating with Kelpful founders to pitch earned media segments or translating existing assets into new variations across social platforms.

Glamorizing the Good Ol' Days

Travelers have a desire to disappear into the pre-digital era, including among millennial and Gen Z respondents, many of whom have never experienced it. Eighty-eight percent of Booking. com survey respondents reported they intend to carve out travel experiences that remind them of simpler times, and 54 percent said that multigenerational "family reunion" trips were at the top of their travel agenda for 2023.

SLO CAL OPPORTUNITY

As a place where Life's Too Beautiful to Rush®, SLO CAL is well positioned to capitalize on this trend. The Land of... brand campaign is grounded in this sentiment, and across communities there are countless experiences that can be woven into integrated storytelling.

Tourism Trends Continued

Peace & Pleasure Pilgrimages

Wellness travel will reach new levels of popularity this year, with travelers taking a no-holds-barred approach to attaining peace and pleasure in less conventional ways, such as silent retreats and a health hiatus to focus on particular issues such as mental health or menopause. Surveys showed that 36 percent of respondents wanted a spiritual travel experience involving alternative substances such as cannabis or plant-based psychedelics, which are set to become more mainstream.

SLO CAL OPPORTUNITY

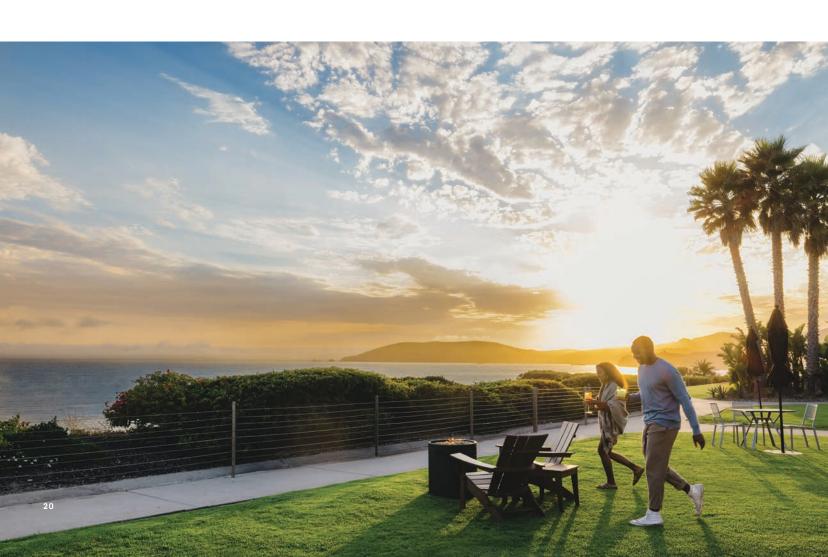
As a place where Life's Too Beautiful to Rush®, SLO CAL is well positioned to capitalize on this trend. The region's pace and venues like Sycamore Mineral Springs Resort & Spa complete with a Healing Arts Dome designed for healing mind and body, along with many other experiences, provide new storytelling angles for Visit SLO CAL.

Pets

In the State of the American Traveler study, 24 percent report they have brought a pet along with them on at least one trip in the last year. Of this group of pet-toting travelers, 44 percent say they "usually" or "always" travel with their pet(s).

SLO CAL OPPORTUNITY

SLO CAL offers pet parents a range of opportunities to bring Fido along, including a wide array of dog-friendly lodging and dining options, beaches, hiking trails, wineries, breweries and distilleries that can be featured in Visit SLO CAL's social media channels.



Brand Research

In July 2022, VSC conducted a benchmark Brand Awareness Study via Heart+Mind Strategies to determine the impact of the brand advertising campaign on key performance indicators and to assess the return on advertising investment. Research objectives included assessing awareness of SLO CAL brand advertising in target Designated Market Areas (DMAs), including by digital media platforms and analyzing differences in brand perception and behavior (recent visitation, travel intention, spending, likelihood to recommend) by advertising awareness and DMAs.

MODE	ONLINE SURVEY	LENGTH	15 MINUTES
DATES	JULY 14 — 24, 2022	GEOGRAPHY	LOS ANGELES San Francisco Phoenix
AUDIENCE	18+ YEARS OLD TRAVELED 50+ MILES FOR LEISURE IN PAST 12 MONTHS AND STAYED OVERNIGHT IN PAID ACCOMMODATION		DALLAS SACRAMENTO SAN DIEGO SEATTLE PORTLAND LAS VEGAS DENVER

Brand Research Continued

Awareness Assessment

Nearly one in 10 travelers (9 percent) in selected DMAs recalled having seen advertising for SLO CAL in the past year without prompting. Once shown *The Land of...* ads, recall increased to 13 percent, with most recall of online ads, though two of five said they saw the ads on television. Visit SLO CAL included Connected TV in the media buy, which would account for this. Those living in Los Angeles are most likely to recall SLO CAL ads.

Key Measures	Total	LA	SF	PHX	DAL	SAC	SD	SEA	POR	LV	DEN
Base Survey Size	3500	500	400	400	400	300	300	300	300	300	300
Unaided ad awareness	9%	13%	12%	9%	6%	11%	11%	6%	7%	6%	6%
Semi-aided ad awareness	15%	19%	16%	14%	15%	14%	14%	13%	11%	17%	12%
Aided ad awareness	13%	17%	15%	12%	10%	12%	12%	10%	12%	12%	11%

Shading indicates statistically significant difference vs. Total at 95% confidence level.

Other destinations generated greater unaided ad recall, most notably San Diego, for which nearly half of travelers report having seen an ad. San Diego Tourism Authority budgets and longevity in advertising to western region spot markets have fueled this level of unaided recall.

		LA	SF	PHX	DAL	SAC	SD	SEA	POR	LV	DEN
San Diego	49%	58%	49%	59%	41%	52%	66%	36%	37%	51%	40%
Lake Tahoe	40%	34%	49%	34%	37%	61%	36%	33%	38%	46%	38%
San Francisco	37%	35%	48%	36%	36%	41%	32%	24%	38%	36%	33%
Palm Springs	31%	46%	24%	29%	30%	23%	46%	28%	27%	27%	21%
Sonoma/Napa	27%	21%	46%	21%	24%	38%	22%	22%	25%	29%	25%
Santa Barbara	18%	28%	17%	15%	18%	15%	25%	13%	11%	15%	15%
Monterey	16%	14%	32%	12%	11%	34%	12%	9%	12%	11%	12%
SLO CAL	9%	13%	12%	9%	6%	11%	11%	6%	7%	6%	6%

Q15. Below is a list of destinations. For each one, please tell us if your remember seeing, reading, or hearing any advertising for that destination during the last year.

Across markets, viewers of the ads take away the intended message that Life's Too Beautiful to Rush®, and they widely agree that the ads encourage travelers to slow down, enjoy life and be aware of the sights and sounds around them. Most also agree that the ads evoke a simpler time.

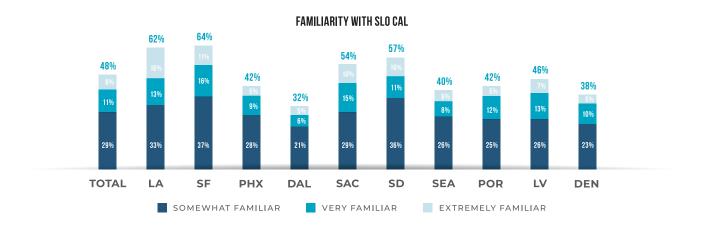
% Strongly Agree + Somewhat Agree	LA	SF	PHX	DAL	SAC	SD	SEA	POR	LV	DEN
Allows you to slow down, enjoy life and be more conscious of sights, sounds, smells and tastes to live vividly	89%	90%	85%	86%	86%	88%	87%	85%	91%	87%
Reminds you that life is too beautiful to rush	87%	88%	86%	87%	87%	87%	87%	86%	90%	86%
Is representative of a simpler time	79%	76%	72%	73%	75%	76%	75%	66%	78%	68%

Q27. How much do you agree or disagree that these ads communicate San Luis Obispo County (SLO CAL) is a place that...

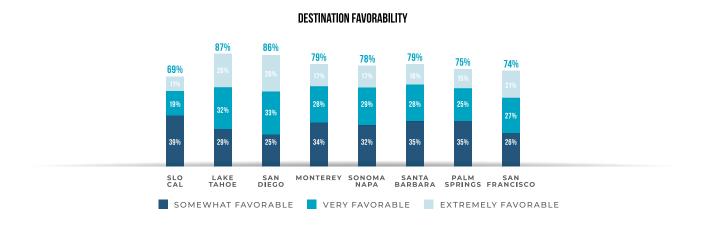


Brand Perceptions & Behavior

About half of travelers indicate some familiarity with SLO CAL. However, familiarity is generally soft, with less than one in three overall stating they are very or extremely familiar. Those in California, especially those in Los Angeles, cite greater familiarity with the destination than those who live out of state.



Likely due to lower familiarity, SLO CAL lags other destinations in terms of favorability. San Diego and Lake Tahoe generate the highest favorability scores, and with a stronger proportion "extremely favorable."



Brand Research Continued

Ad awareness has a positive impact on all brand and visitation metrics. Those who have seen the ads are more likely than average to indicate a willingness to consider SLO CAL as a vacation getaway destination and have much higher travel intent, both in the near term (next three to four months) and longer term (next 12 months).

Brand Imagery	Total	Aware of Ads	Brand Imagery	Total	Aware of Ads
Has amazing scenery	66%	84%	A place to be refreshed	63%	77%
Is a place that has its own unique vibe	66%	85%	A place of diverse ecology and landscapes	60%	77%
Is relaxing	65%	83%	A place that still embraces simple pleasures	60%	77%
Is a place with big-time natural beauty	62%	82%	A place to slow down	60%	74%
Is charming	61%	79%	Has small-town charm and big time natural beauty	60%	77%
Is authentic	60%	78%	A friendly, accepting place	60%	74%
Is fun	59%	79%	A place for people who like to wander	59%	75%
Is a friendly, accepting place	58%	76%	You can enjoy many unique experiences in one trip	58%	74%
Is a place to be refreshed	57%	79%	A place with open spaces that feels less crowded	58%	75%
Is rich in history and heritage	56%	79%	A place filled with undiscovered gems	54%	69%
Is a place with lots to see and do	55%	76%	Where people connect to the rhythms of nature/land	53%	74%
Has open spaces that feel less crowded	54%	73%	A place with lots of eclectic experiences	50%	66%
Is a great family place	52%	76%	A place that feels like many places in one	46%	65%
Has a small-town feel	52%	70%	Beautiful	76%	86%
Is accepting and inclusive	51%	70%	Scenic	75%	84%
Makes me feel welcome	51%	73%	Casual	73%	80%
Is easy to get around	50%	69%	Relaxing	72%	85%
Is culturally diverse	50%	68%	Laid-back	69%	79%
Offers luxurious experiences	46%	68%	Peaceful	69%	82%
Has entertainment and nightlife	46%	69%	Charming	68%	82%
Provides good value for the money	41%	63%	Friendly	67%	80%
Has big city amenities	40%	58%	Fun	67%	80%
A classic California place	67%	81%	Welcoming	65%	79%
Has its own unique vibe, different from SoCal/NorCal	63%	77%	Unpretentious	47%	62%



Additionally, those who recall the ads are more likely than average to have visited SLO CAL in the past. When they do visit SLO CAL, they stay for more nights and spend more money in the destination.

Key Measures	Total	LA	SF	РНХ	DAL	SAC	SD	SEA	POR	LV	DEN
Base Survey Size	3500	500	400	400	400	300	300	300	300	300	300
Likelihood to Consider SLO CAL % top 3 box on a 10-pt scale	56%	69%	54%	55%	59%	55%	53%	51%	44%	59%	50%
Next 3-4 Months Travel Intent % top 3 box on a 10-pt scale	28%	39%	33%	28%	30%	29%	23%	24%	16%	33%	22%
Next 12 Months Travel Intent % top 3 box on a 10-pt scale	49%	62%	54%	48%	50%	51%	44%	42%	35%	54%	38%

Shading indicates statistically significant difference vs Total at 95% confidence level.

Return on Investment (ROI)

Based on examining past behavior (September 2021 through July 2022) and future travel intention of those recalling the ads (versus not), the campaign's expected impact on visitation is an incremental 376,000 visits.

DMA	18+ Travel Population
Los Angeles	9.97 million
San Diego	1.79 million
San Francisco	4.01 million
Sacramento	2.28 million
Seattle	2.90 million
Las Vegas	1.22 million
Phoenix	3.05 million
Dallas	4.09 million
Portland	1.88 million
Denver	2.49 million
Total	33.68 million

TOTAL PROJECTED VISITS WITH CAMPAIGN: 1,454,000

TOTAL PROJECTED VISITS WITH NO CAMPAIGN: 1,078,000

CAMPAIGN IMPACT ON VISITATION: +376,000 VISITS

Source: U.S. Census; travel incidence from this study by DMA

These incremental visits were projected to have a net positive impact on economic contribution to SLO CAL and on tax revenue for SLO CAL. Beyond the revenue earned to date, the campaign may also have a residual impact on future visitation. Overall ROI is net positive, including a tax revenue per ad dollar ratio greater than 2:1.

INCREMENTAL VISITS

+376,000 VISITS X \$1,300 AVG SPEND PER VISIT: \$488,800,000 ECONOMIC CONTRIBUTION TO SLO CAL

REDUNDANT VISITS

+137,000 VISITS X \$299 AVG SPEND PER VISIT: \$40,963,000 ECONOMIC CONTRIBUTION TO SLO CAL

TOTAL ECONOMIC CONTRIBUTION: \$529,763,000

INCREMENTAL VISITS

+376,000 VISITS X \$431 AVG LODGING PER VISIT X 1.5% ROOM ASSESSMENT: +\$2,430,840 ASSESSMENT REVENUE FOR VISIT SLO CAL

REDUNDANT VISITS

+137,000 VISITS X +\$23 AVG ROOM SPEND X 1.5% ROOM ASSESSMENT: +\$47,265 ASSESSMENT REVENUE FOR VISIT SLO CAL

TOTAL INCREMENTAL CONTRIBUTION FOR VISIT SLO CAL: \$2,478,105

TOTAL BOOKED TRIPS WITH CAMPAIGN: 2,124,000

TOTAL PROJECTED VISITS WITH NO CAMPAIGN: 1,448,000

CAMPAIGN IMPACT ON FUTURE VISITATION: +676,000 VISITS

	Total to Date	Total from Future Bookings	Combined	Campaign Cost	ROI
Economic Contribution to SLO CAL	\$488,800,000	\$933,816,000	\$1,422,616,000	60.155.004	\$451 per ad dollar spent
Incremental Contribution for Visit SLO CAL	\$2,478,000	\$4,434,000	\$6,912,000	\$3,155,024	\$2.19 per ad dollar spent

SLO CAL Brand Positioning

SLO CAL offers travelers the opportunity to live vividly. It is a place that enables one to be fully present and see more clearly on every level: physically, emotionally and with all your senses. This distinct benefit is made possible by the unique blend of people, place and pace who embody the SLO CAL lifestyle.



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®.

Brand BHAG

(Big Hairy Audacious Goal)

On behalf of the region's assessed lodging businesses and local destination partners, Visit SLO CAL is in pursuit of a big hairy audacious goal (BHAG)—for SLO CAL (San Luis Obispo County) to become as well defined, well known and well loved as So Cal (Southern California) and Nor Cal (Northern California).





Objective

Amplify and steward the SLO CAL brand through unified efforts

STRATEGY

Finalize and launch local adoption of SLO CAL nomenclature strategy

KEY RESULTS

- Finalize and launch local adoption of SLO CAL nomenclature strategy by July 1, 2023, and create and benchmark deliverables by September 30, 2023
- Develop an integrated plan framework across paid, owned and earned channels by August 1, 2023
- Create a suite of digital and video assets supporting local nomenclature adoption for debut at the 2023 Destination Summit
- Launch assets across paid, owned and earned channels beginning November 1, 2023, and continuing through June 30, 2024

STRATEGY

Continue to build on House of Brands marketing strategy to advance destination engagement

KEY RESULTS

- Develop a year-round co-op program that provides a range of buy-in opportunities for destination partners by July 31, 2023, covering earned, owned and paid initiatives
- Continue to build on House of Brands marketing strategy by October 31, 2023
- Continue to develop SLO CAL Crafted to increase participation and create opportunities for two key activations by December 30, 2023

STRATEGY

Advance phase one sustainable tourism strategy

KEY RESULTS

 Develop a phase 1 marketing strategy for Sustainably SLO CAL by August 30, 2023 Develop new Sustainably SLO CAL campaign assets from existing source footage/imagery to run across paid, owned and earned channels by October 31, 2023

STRATEGY

Advance integrated storytelling through the creation of shareable marketing asset strategy

KEY RESULTS

- Create sharable marketing asset strategy by November 30, 2023, and implement by February 29, 2024
- Develop and launch a creative content series leaning into deeper storytelling with shareable assets across paid and owned channels by March 31, 2024
- Leverage existing footage from creative partners to develop new video, digital and custom content assets to support the integrated storytelling across paid channels by March 31, 2024

Objective

Demonstrate value to investors, partners, stakeholders and communities

STRATEGY

Launch community engagement plan to build local awareness of the positive impact tourism has on the community

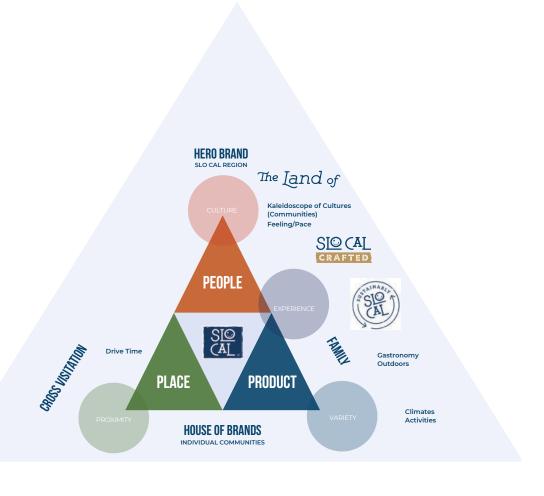
KEY RESULTS

 Launch community engagement PR plan by August 30, 2023, to build local awareness of the positive impact tourism has on the community and benchmark deliverables by September 30, 2023

Integrated Storytelling Framework

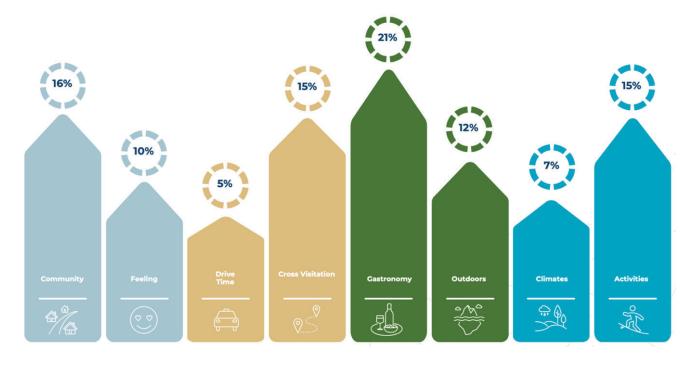
Critical to pursuit of the BHAG is an integrated brand voice and approach to storytelling designed to create greater synergy across paid, owned and earned channel activity. The more consumers are exposed to SLO CAL advertising, social media posts, influencer content and media coverage that has been developed with this intention, the more likely they are to be aware of and hold an affinity for the region.

Building from FY 23, Visit SLO CAL in collaboration with its agency partners (The Shipyard, Pensara, MMGY NJF) expanded the storytelling framework to encompass integrated messaging across anchor campaigns while identifying areas of opportunity that best exemplify people, place and pace (SLO CAL Lifestyle).



Share of Messaging

Social media posts corresponding to each element of the messaging matrix.





"The Land of..." Brand Campaign



When you visit SLO CAL, it feels like a land unto itself, nestled somewhere between excited anticipation and relaxed contemplation. Closely connected to nature yet far beyond the reaches of our frenzied everyday lives, it's home to a unique blend of beautiful landscapes, warm-hearted folks and surprising adventures just waiting to be discovered. And when you find yourself in this land—with friends, family, loved ones and your own thoughts—you're inspired to live life to its most vivid.

Since it launched in 2021, The Land of... brand campaign has highlighted the breadth and diversity of SLO CAL and its kaleidoscope of cultures and experiences. Hero Brand and House of Brands advertising assets include video, display, native and social, along with longer storytelling in the form of custom content and most recently out-of-home placements.

Heart+Mind tracking showed the ads generated near universal favorability; 97 percent were somewhat or very favorable, with 58 percent giving the highest ad favorability rating. Campaign performance continues to be strong with double-digit year-over-year increases across impressions earned, video completion rate, click-through rate, sessions and partner referrals.















The Land Of... Continued

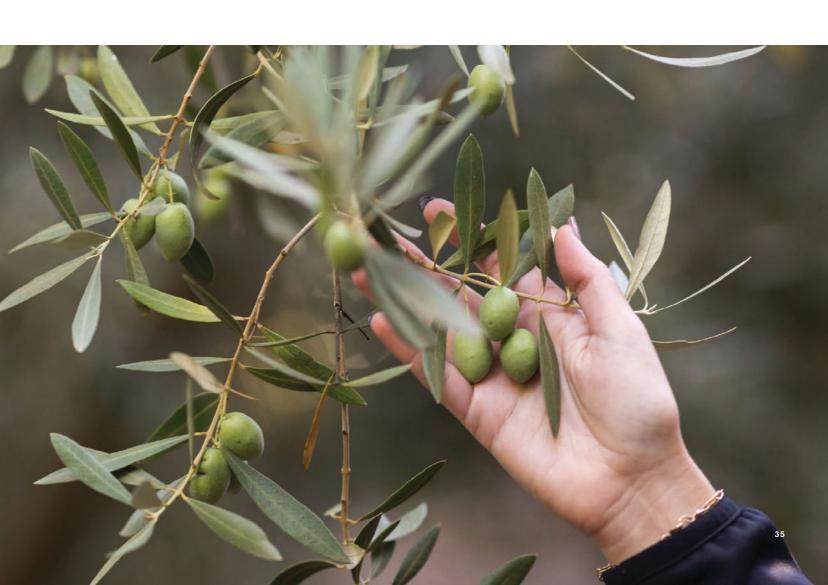
Launched in FY 23, cross-visitation storytelling was added to the foundational Hero Brand and House of Brands assets to connect experiences across two different SLO CAL communities and reinforce proximity and ease of getting around. These videos have outperformed with an 80 percent video completion rate (27 percent higher than the average for 15-second video assets).

In the recent evolution of the social strategy adopted by Visit SLO CAL, cross-visitation was highlighted as one of eight key messaging focuses alongside Drive Time and Community, which also align closely with directly promoting wider awareness, dispersal and longer stay in destination. Social posts and story content dedicated to House of Brands promotion and the opportunity for cross-visitation now account for more than 20 percent of content. Alongside this, Visit SLO CAL has made efforts to position its social channels as a town center for the neighborhoods that flourish in the region, providing an opportunity and space for different partners to engage with one another and demonstrate the proximity and complementary nature of their tourism offerings to consumers.





Based on robust performance of the :60 SLO CAL Crafted videos, Visit SLO CAL will leverage its extensive library to develop complementary :15 and :30 second video assets. These additional formats will unlock new opportunities for deployment across a wider range of paid media publishers and expand retargeting potential to continue to strengthen and enhance the integrated brand storytelling across paid and owned channels.



FY 24 New Marketing Assets & Activation

In FY 24, Visit SLO CAL will activate integrated storytelling across several pillars.

SUSTAINABLY SLO CAL

Build on the momentum of the WTTC Destination Spotlight program to elevate SLO CAL as a leading sustainable tourism destination

BRAND STORYTELLING

Bring more immersive content to the SLO CAL brand storytelling toolkit

KEY MARKET ACTIVATION

Engage media and consumers in a key opportunity market to drive awareness and interest in SLO CAL



Sustainably SLO CAL

The World Travel & Tourism Council Destination Spotlight Video Series was a first-of-its-kind program to highlight the development and growth in sustainable practices throughout the region. Visit SLO CAL will continue to position the destination as sustainably minded, where people live vividly and work purposefully together to protect and preserve SLO CAL for the long-term benefit of all. Sustainably SLO CAL will be built on a virtuous cycle where awareness inspires experience, experience inspires intention and intention inspires action.



While consumer values and sentiment do not necessarily translate into travel behavior—value for the money is significantly more likely to drive a travel decision than the sustainability and conservation policies of the destination (YouGov 2022)—brands can create a halo effect that validates life values.

To that end, Visit SLO CAL will continue to build new storytelling avenues, including advertising assets developed from the raw source footage and imagery shot for the World Travel & Tourism Council program.

Brand Storytelling

The Land of... SLO CAL advertising campaign provides high-level inspiration across a broad spectrum of experiences and locations in quick, compelling bites. But deployment of SLO CAL Crafted videos in the paid media campaign has demonstrated that Visit SLO CAL's audience has an appetite for longer-form content featuring more focused, in-depth storytelling. So the next chapter of content will bring more immersive, experience-based pieces into the mix—whether in the culinary, arts, entertainment, outdoors, wellness or other spaces. This content dials up the fun and joy of each experience while bringing audiences deeper into the SLO CAL way of life through more singular narratives and perspectives.

Key Market Activation

Another pillar of integrated storytelling is the development of a key market activation comprising a media mission and consumer event designed to drive awareness and interest in SLO CAL. Dallas is a prime market for this opportunity, following a FY 23 media mission, and with a recent 68 percent increase in airline seats into SBP from this market. A paid media blitz featuring The Land of... brand advertising campaign will run leading up to the consumer event, which will feature a SLO CAL Crafted marketplace and social media engagement activation. The earned team will reconnect with journalists from the spring media mission and host media and influencers at the preview event.

SLO CAL House of Brands

As a region, SLO CAL is made up of a myriad of individual destinations, each with their own logo and brand identity. In FY 2022, Visit SLO CAL sought to create a phased House of Brands approach to unify and connect its destination partners to the SLO CAL brand in meaningful ways that aid understanding by potential travelers.

SLO CAL's unique towns and kaleidoscope of cultures all come together as a unified local spirit; a friendly feeling of community among the individual communities. This insight was translated into a new SLO CAL connector and adopted by destination partners in the form of co-branded lockups or adapted brand marks.





























SLO CAL House of Brands:

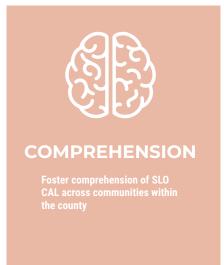
Always On

In FY 23, Visit SLO CAL shifted to an "always on" approach for House of Brands activity. At the heart of this approach is continued connection and collaboration with destination partners, along with the intention for "SLO CAL" to become ubiquitous both within San Luis Obispo County and outside of it. As "SLO CAL" gains traction as the official acronym for the county, it will aid in advancing key organizational imperatives while helping to foster greater understanding of the region and its many communities.

HOUSE OF BRANDS "ALWAYS ON" CORE STRATEGIES







To that end, Visit SLO CAL will add a locally focused effort targeting the SLO CAL communities through paid, earned and owned media. Turning the lens inward and exposing residents to the SLO CAL brand story provides an opportunity to tap into the deep sense of pride and affinity that comes with being a member of the SLO CAL community and reinforce adoption of the "SLO CAL" moniker.

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Primary Target Audience:

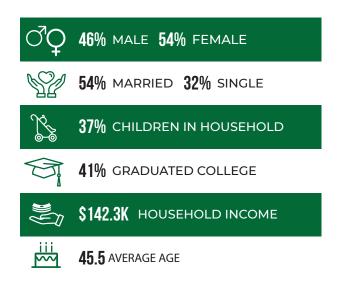
the Purposeful Traveler

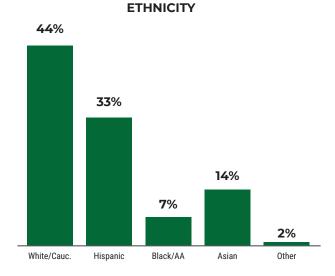
The Purposeful Traveler lives vividly and values simplicity, keeping life and the mind as uncluttered as possible. Authenticity and being true to oneself while maintaining strong personal relationships with family and friends is particularly important. Curious and creative, they are open-minded, want to explore and learn about new things and seek stimulating experiences. They are in tune with nature and themselves, doing things because they like them and get enjoyment from them.

SECONDARY TARGET AUDIENCE: FAMILIES

Of the total Purposeful Traveler target audience, one-quarter travel with children. These families are younger, more diverse, have a higher household income and are more likely to be married. They spend 30 percent more per trip than those traveling without children given a larger party size.

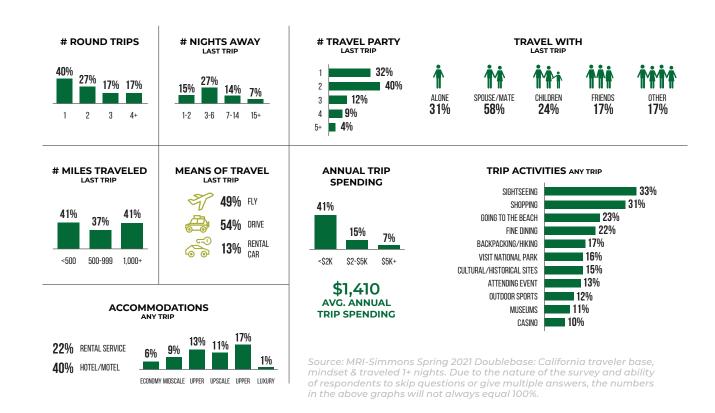
THE PURPOSEFUL TRAVELER: DEMOGRAPHICS



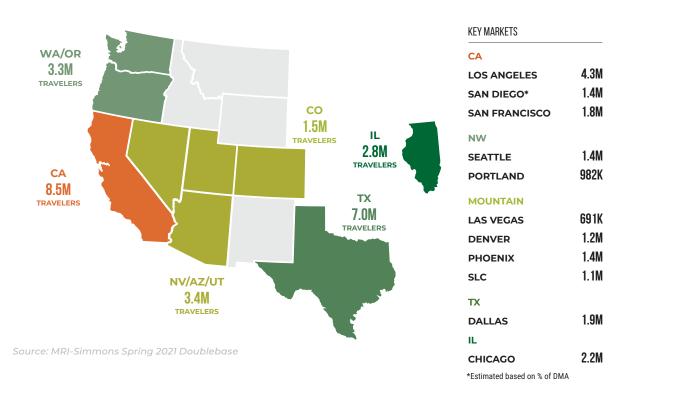


Source: MRI-Simmons Spring 2022 Doublebase: California traveler base, mindset & traveled 1+ nights

THE PURPOSEFUL TRAVELER: TRAVEL PROFILE



THE PURPOSEFUL TRAVELER: TARGET UNIVERSE



Geographic Prioritization

Visit SLO CAL will continue to prioritize geographic markets using a tiered system. In an attempt to strengthen Visit SLO CAL's presence in select markets, the tiered strategy has shifted, with a focus on markets in need of more exposure. Tiers were prioritized based on past visitation, familiarity with the destination and consideration to visit, balanced with load factor and changes to air service. Tier 1 markets represent those with the greatest need for increased exposure. Tier 2 markets have higher visitation rates; however, familiarity/consideration is on the lower end representing an opportunity for growth. Tier 3 markets are primarily in-state drive markets generating a large volume of overnight stays and will continue to be a priority for investment at maintenance levels.

2022 SLO CAL ARRIVALS BY ORIGIN MARKET									
PRIORITY	DESIGNATED MARKET AREA	FLIGHT STATUS	% OF ARRIVALS	FAMILIARITY/ CONSIDERATION/ VISITATION INDEX	% OF BUDGET	YOY BUDGET ADJUSTMENT			
Tier 1	DALLAS/FORT WORTH, TX	+68% seats	0.5%	70	15%	+14%			
	DENVER, CO		0.7%	74	8%	+10%			
	PHOENIX, AZ	AA shift to A319	1.8%	85	11%	+10%			
Tier 2	SEATTLE/TACOMA, WA		1.0%	83	7%	+9%			
	LAS VEGAS, NV		1.0%	96	8%	+20%			
	PORTLAND, OR	At capacity	0.6%	84	5%	+18%			
Tier 3	SAN DIEGO, CA	Challenge with filling	2.9%	119	7%	+28%			
	SACRAMENTO/STOCKTON/MODESTO, CA		7.4%	117	7%	-6%			
	SAN FRANCISCO/OAKLAND/SAN JOSE, CA		11.2%	127	11%	-5%			
	LOS ANGELES, CA		23.8%	133	21%	-17%			

Spending for these markets will be adjusted based on opportunity and capacity.



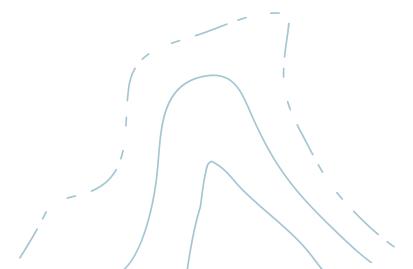
Paid Media

Over the past two years, Visit SLO CAL has developed a strong foundational media plan through the Always On layer, incorporating seasonal heavy-ups to drive visitation in low periods. While this approach has proven effective, the paid media landscape continues to evolve with growing fragmentation.

Consumers spend nearly 13 hours a day with media, across a wide range of channels and devices. They often utilize multiple platforms simultaneously, making it increasingly challenging for advertisers to break through. Time spent with linear TV is now equal to digital video, a shift driven largely by younger generations.

Despite the slowed growth of social media usage seen during the pandemic, two-thirds of the U.S. population continue to use social networks. For social platform users, video viewing and creation is driving an increase in time spent and total inplatform engagement.

The cookieless future is upon us; much of the digital world has already moved away from cookies and Google is set to finally sunset cookies in 2024. Visit SLO CAL has already made adjustments within this space, relying on platforms like OTT (video streaming) and social media, where cookies had limited usage or functionality. Less reliance on cookies has not had a negative impact on campaign success and The Land of... continued to see high engagement surpassing goals throughout FY 23.



FY 23 PAID MEDIA ENGAGEMENT











*Campaign performance July 1, 2022 through March 31, 2023

FY 24 PAID MEDIA

Objectives

- Drive high levels of awareness of the SLO CAL brand and consideration to visit
- Connect Purposeful Travelers with the relevant message, showcasing the full breadth of SLO CAL
- Provide air service support by generating awareness of routes in key fly markets and driving demand for visitation

Strategies

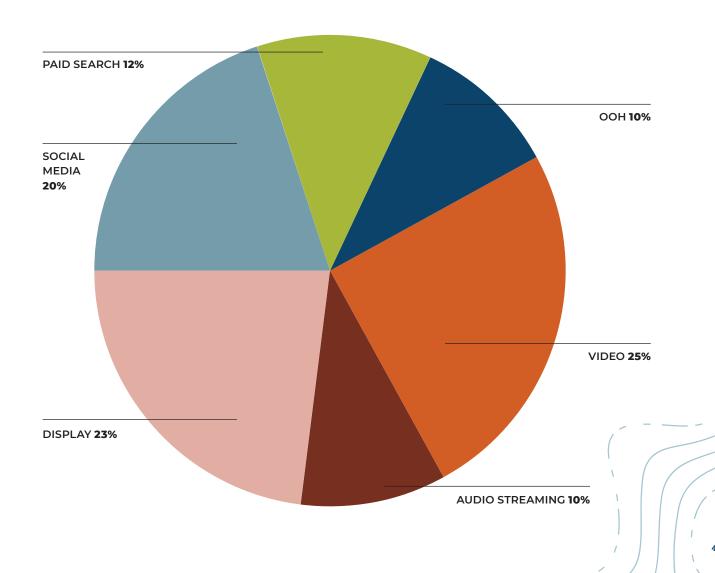
- Continue to build upon previous campaign learnings to reach Purposeful Travelers and drive awareness and consideration of SLO CAL
- Introduce new targeting to better identify and reach the Purposeful Traveler, maximizing efficiencies and driving improved engagement
- Reprioritize target geographies using a tiered approach, with customized programming in each market to focus dollars for maximum impact
- Maintain a layered media approach to reach Purposeful Travelers across a diverse mix of media channels
- Lean into always-on media with new opportunities for co-op efforts to advance destination engagement
- Incorporate seasonal heavy-ups to reach Purposeful Travelers at all points within the travel planning funnel and support crossvisitation, midweek and seasonal messaging to drive stays during typically lower visitation periods



Media Mix / Budget Allocation

The FY 24 media mix was developed using media usage trends and current campaign performance intelligence, balanced with awareness results from the 2022 Heart+Mind Awareness Study. This multifaceted paid media program will optimally deliver on the campaign objectives and strategies, and as new data is collected, the media mix will be optimized according to real-time key performance indicators (KPIs).

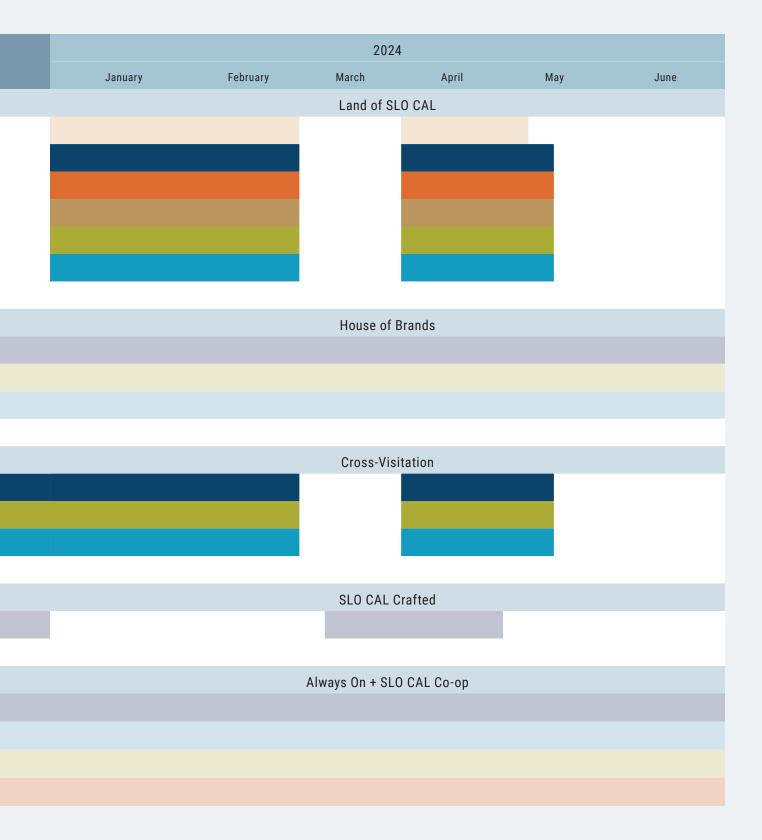
FY 24 MEDIA BUDGET: \$3,000,500



FY 24 MEDIA FLIGHTING



Note: Brighter color bars indicate additional media spend



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 key performance indicators (KPIs).

TACTICS: Video Content Rich Media	AWARENESS 51%	Primary KPIs: Video Completion Rate Content Views	Secondary KPIs: Video Views Time with Content Engagement Rate
NATIVE SOCIAL	CONSIDERATION 30%	Click-Through Rate Sessions Pageview	Time on Site Onsite engagement
DISPLAY SOCIAL SEARCH	INTENT 18%	Partner Handoffs/ Referral Rate Booking Searches/ Search Rates	Arrival Lift/ Arrivals per 1k impressions

Goals for each KPI will be established prior to the launch of each phase using a combination of historical SLO CAL campaign data and industry benchmarks. These goals will be leveraged throughout the campaign to provide insights and guide optimizations.

In addition to primary KPIs, campaign performance will be monitored for quality metrics, including viewability and brand safety, using a combination of tracking partners such as Doubleclick Campaign Manager, Integral Ad Science and MOAT.

Research data will be integrated biannually to gain additional insight into which media partners may be better at inspiring visitation than others.

The various methods of measurement noted will provide insight into audience interest and engagement with a direct correlation to media placements but will not deliver on brand awareness lift or return on ad spend, which will be tracked using a primary research study.

Advertising Tracking Study

Visit SLO CAL will deploy wave two of the Heart+Mind advertising awareness and effectiveness study in summer 2023. It will explore changes in the impact of the FY 23 brand program. This study will look at awareness of the The Land of... campaign and its impact on sentiment and intent to travel. Relevant findings from this study will be applied to the FY 24 program of work, with a similar study conducted at the end of the fiscal year media flight.



Owned Media

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

Objectives

- Increase awareness of SLO CAL, raising awareness of the destination and the travel opportunities present
- Position SLO CAL as a place where something exciting is always happening, giving consumers a reason to visit
- Utilize assets across paid, owned and earned to maximize efficiency

Strategies

- Drive traffic to owned platforms and channels to increase dwell time
- Support partners and local businesses across channels
- Integrate with paid and earned efforts to increase brand awareness

- Launch new assets specifically integrated with paid and earned efforts beginning November 1, 2023, and continuing through June 30, 2024
- Maintain and optimize web presence through ongoing development and UX study by December 30, 2024

Earned Media & Public Relations

Alongside domestic and international PR agencies, Visit SLO CAL works to bring third-party endorsements from top journalists and social media influencers. VSC aims to expand destination awareness by providing highly curated media trips for firsthand SLO CAL perspectives.

Objectives

- Align with owned, paid and earned offices to better integrate storytelling strategy both domestically and internationally
- Strengthen relationships with local media to promote the benefits of tourism and influence the local adoption of the SLO CAL nomenclature
- Offer value to investors, partners and stakeholders for educational and informational PR initiatives and strategies

Strategies

- Leverage media relationships to secure quality coverage for SLO CAL across fly/drive markets
- Focus international efforts in the UK and Ireland to raise awareness of SLO CAL and increase visitation and length of stay
- Drive awareness of the positive impact of tourism in local communities
- Increase awareness and usage of SLO CAL nomenclature

- Development and implementation of PR strategy focused on the UK/Ireland by August 30, 2023
- Launch community engagement PR plan by August 30, 2023, to build local awareness of the positive impact tourism has on the community and benchmark deliverables by September 30, 2023
- Secure 12 individual domestic and six international media familiarization (FAM) trips touching two or more destinations by June 30, 2024
- Leverage media relationships to promote SLO CAL nomenclature through local media channels by June 30, 2024



Partnerships and Events

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

SLO CAL CRAFTED

Objectives

- Grow equity in the SLO CAL Crafted brand, tapping into consumers' desire for authentic experiences and products
- Grow awareness and participation in SLO CAL Crafted as a locally recognized and trusted certification

Strategies

- Develop in-market opportunities to increase awareness of SLO CAL Crafted as a locally recognized and trusted certification
- Provide value to SLO CAL Crafted partners to increase engagement with the SLO CAL Crafted brand by elevating their brand through our platforms

Key Results

- Continue to develop SLO CAL Crafted to increase participation and create opportunities for two key activations by December 30, 2023
- Build SLO CAL Crafted 2.0 that includes program segmentation and geographic equality

PARTNER ENGAGEMENT

Objectives

- Expand knowledge and reach of Visit SLO CAL and participation with and by tourism partners throughout the county to increase storytelling opportunities
- Create value for investors, partners and stakeholders

Strategies

- Encourage the adoption of SLO CAL nomenclature strategy with partners to amplify the SLO CAL brand
- Execute the revised engagement strategy to onboard, educate and engage partners
- Provide opportunity for investors, partners and stakeholders to amplify their brands

- Activate partner engagement strategy to increase adoption of SLO CAL nomenclature by October 31, 2023
- Increase participation in VSC partner programs by 10 percent over baseline by June 30, 2024



SIGNATURE EVENTS

Objectives

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

Strategies

- Identify and sponsor signature events to drive visitation
- Create brand alignment with national and international brands that fit SLO CAL's personality to increase destination awareness
- Amplify SLO CAL's brand in event activation opportunities

- Implement the Event and Festival Strategy as adopted by the board of directors by September 30, 2023
- Identify potential signature event or festival for SLO CAL by December 31, 2023



Sales

Now complete with a sales team of two, Visit SLO CAL continues to work hard to reactivate the segments of our sales business post pandemic. VSC is focused on prioritizing and growing relationships with meeting and event planners and tour operators by attending industry events and tradeshows as well as hosting FAMs to generate awareness of the region.

As international markets continue to open, VSC will leverage its strategic partners to increase efforts in the United Kingdom and Ireland while also working closely with Visit California on other key markets. VSC will continue partnering with lodging investors and meeting facilities partners to increase bookable products, making it easier for tour operators and meeting planners to choose SLO CAL.

MEETING & CONFERENCE

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

Strategies

- Build and advance partnerships with meeting planners
- Attend Smart Meetings National Northern California Experience
- · Attend CalSAE's Seasonal Spectacular
- Continue to build and promote the advanced facilities module on SLOCAL.com

- Deliver build-out and promotion of VSC's advanced facilities module by November 30, 2023
- Generate 15 sales leads quarterly, with a focus on need times, by June 30, 2024
- Participation of eight lodging investors or partners in co-op sales initiatives by June 30, 2024

Tour and Travel

Objectives

- Build and nurture relationships with international and domestic tour operators and travel buyers to increase shoulder season (October – March) occupancy
- Increase bookable product through receptive tour operators and bed banks
- Provide lodging investors and partners with education and sales opportunities to engage with target audiences

Strategies

- Attendance at the following industry trade shows:
 - National Tour Association Travel Exchange (November 2023)
 - Go West Summit (February 2024)
 - IPW (May 2024)
- Organize and execute in-person California sales blitz
- Leverage VSC's international agencies to grow segment
- Organize and execute an educational workshop with tour operators and bed banks

- Develop and implement a countywide sales strategy by October 31, 2023
- Facilitate two educational sessions by October 31, 2023, and April 30, 2024, for lodging investors and partners to build relationships with international and domestic tour operators and travel buyers
- Facilitate and confirm five contracts per quarter between receptive tour operators and lodging investors/partners by June 30, 2024
- Participation by 10 lodging investors or partners in co-op sales initiatives by June 30, 2024





Film SLO CAL

As the office for the San Luis Obispo County Film Commission, Film SLO CAL promotes the county as a desired and dynamic filming location, aiming to increase the overall economic impact of filming in the area. Film SLO CAL works to accomplish this by generating support and managing production leads for motion pictures, television and commercials, as well as encouraging a strong, collaborative film industry within SLO CAL.

Objectives

- Position Film SLO CAL as the entry point for filming professionals increasing the economic impact of filming in SLO CAL
- Increase awareness of the diversity of filming landscapes available

Strategies

- Strengthen relationship with statewide boards and local film organizations to enhance filming reputation in SLO CAL
- Generate film scout and media leads to create demand for production leads, staged productions and filming days in the variety of landscapes and settings that SLO CAL has to offer

- Deliver location FAM tour for at least five film scouts, pitching at least one trade media for attendance by April 30, 2024
- Deliver permitting partner educational mixers to streamline the permitting process and educate on industry best practices during the SLO International Film Festival by April 30, 2024



Experience SLO CAL 2050

Experience SLO CAL 2050 is the destination management strategy focused on maintaining and improving resident quality of life while creating economic activity for and stewardship of our region. In FY 23, Visit SLO CAL made considerable strides delivering on and advancing key recommendations in Experience SLO CAL 2050. With several programs now complete, the management of those programs becomes an additional focus of Visit SLO CAL. In FY 24, new development will begin to further additional recommendations in line with Visit SLO CAL's recently approved Strategic Direction 2026.

Initiatives including countywide customer service training and countywide events and festivals strategy both advanced, while new thematic routes were developed to promote cross-visitation. VSC will continue investing and supporting products, services, activities and events that preserve the high quality of resident life while promoting the must-visit destination experience of SLO CAL.



Experience SLO CAL 2050 Continued

ITEMS VISIT SLO CAL WILL ADVOCATE FOR IN FY 24

Talent Attraction, Development & Careers

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. As part of the recently approved Strategic Direction 2026, Visit SLO CAL will begin mapping the advancement of a tourism industry workforce development plan beginning with the completion of a regional tourism industry workforce strategy in FY 24.

Stewardship in Tourism

Visit SLO CAL will continue advocating for sustainable stewardship tourism programs, across environmental, social and economic verticals, impacting the quality of SLO CAL as a visitor destination and a place for residents to live, work and play. Visit SLO CAL will utilize the commissioned FY 23 Cal Poly Experience Industry Management class project results to inform efforts around sustainability certification across different verticals of the tourism industry. As part of the recently approved Strategic Direction 2026, Visit SLO CAL will begin mapping the advancement of a long-term Sustainable Tourism Strategy roadmap.

Workforce Housing & Transportation

Visit SLO CAL will continue advocating alongside a variety of partners to municipal and county governments for the development of workforce housing and better public transportation for workforce to and from business corridors and existing and future housing developments. Visit SLO CAL will continue working closely with the San Luis Obispo Council of Governments (SLOCOG) as the lead agency for both transportation and housing plan development. Visit SLO CAL will utilize the outcomes from their commissioned Short-Term Vacation Rental/ Workforce Housing Nexus Study, by Beacon Economics, completed in early FY 24, to help inform efforts to increase workforce housing specifically for the tourism industry.

ITEMS TO BE ADVANCED IN FY 24

Countywide Trail System

In FY 23, Visit SLO CAL began research on a comprehensive trail system that included all walking, hiking, biking, running and equestrian trails in SLO CAL. Over the next fiscal year, Visit SLO CAL will partner and collaborate with trail organizations and county and municipal stakeholders to begin working on an agreement for a joint strategy, plan and advocacy approach for the countywide connected trail system. Visit SLO CAL will work to identify a selected agency to conduct a comprehensive analysis of all existing county trails. The evaluation will then lead to the development of a web- and mobile-facing trail platform that visitors and residents will be able to easily access. The support and promotion of a connected SLO CAL will benefit both visitors and residents who love to walk, hike, run, bike and ride horseback.

Countywide Events & Festivals Strategy

With the countywide Events & Festivals Strategy recently approved by the Visit SLO CAL Board of Directors, VSC will move to phase three of the initiative, developing a countywide events and festivals calendar. The calendar will focus on streamlining the process for calendaring and marketing events across the county while providing a one-stop, opaque solution for visitors, destinations, event organizers and residents alike and will highlight signature and destination events occurring in the county, promoting crossvisitation and an increase in overnight stays.

Signature Event

Stemming from the countywide Events & Festivals Strategy completed in FY 23, Visit SLO CAL began working to identify a high-quality experience as a signature event or festival for SLO CAL. The focus will be on identifying an experience unique and specific to SLO CAL that can assist in raising awareness and long-term visitation for the region during a need calendar period.

Sustainable Tourism Assessment

In spring 2023, Visit SLO CAL launched Sustainably SLO CAL, showcasing and supporting community efforts in sustainable tourism. Stemming from the recent Visit SLO CAL Board approval of Strategic Direction 2026, in FY 24, Visit SLO CAL will conduct a countywide sustainability assessment through the Global Sustainability Tourism Council. The assessment is focused on understanding SLO CAL's current state and opportunities to advance sustainability efforts in tourism and hospitality. Having a steadfast commitment to sustainable practices not only maintains and improves the quality of life for residents but also enhances the visitor destination experience.

Experience SLO CAL 2050 Continued

VISIT SLO CAL'S EXISTING SCOPE OF WORK

SLO CAL Welcome Customer Service Training Adoption

With the completion of the Customer Service Training learning platform in both English and Spanish, Visit SLO CAL will continue efforts for adoption within SLO CAL's travel and tourism industry. The platform focuses on tiered customer service learning, with a specialized module also available for Equity, Diversity and Inclusion, different tourism verticals as well as a destination awareness component. The training is no cost to participants, allowing for every employee to develop their understanding and skill set in providing enhanced guest experiences as well as becoming more informed on things to do across the county, leveraging existing assets and promoting cross-visitation between communities.

Thematic Routes

Visit SLO CAL will continue to work with local destination partners and communities to identify and create new themed routes as well as strengthen existing routes to continue promoting multiday experiences that travelers can use to plan their trips. These routes help visitors understand SLO CAL's diverse region and encourage cross-visitation.

Air Service & Airport Development

Visit SLO CAL will continue working with the San Luis Obispo County Regional Airport to advance the air service development strategy, with a goal of evolving current markets to larger airbus service while developing new markets creating additional inbound air service routes. Visit SLO CAL will also partner with SBP to advocate for the continued development of airport infrastructure.

International Visitors

Visit SLO CAL will leverage its new agency partner in the United Kingdom and Ireland to increase visitation from Europe. VSC will continue its partnership with Visit California to advance other key international markets working to attract visitors via travel trade and public relations efforts.

Paso Robles Wine Country Alliance & SLO Coast Wine Collective

Visit SLO CAL will continue collaborating and partnering with the Paso Robles Wine Country Alliance and SLO Coast Wine Collective to build upon our already strong wine awareness and continue efforts for cohesive branding for the county.



Equity, Diversity & Inclusion

Visit SLO CAL remains committed to fostering 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 Visit SLO CAL's Equity, Diversity and Inclusion (EDI) Plan, established in June 2020, VSC will focus on the following programs over the coming year.

Building EDI Content

With Visit SLO CAL's continued focus on leveraging FY 22's EDI Audience and Asset Alignment Study and the supporting video and photo asset development, the organization remains well positioned to advance a business and marketing plan that meets diverse customer needs and expectations, thereby growing SLO CAL's visitor base. VSC is committed to working with destination partners and individual municipalities on their business plans to develop new products and services to authentically attract and welcome all visitors. In FY 24, VSC will continue to advance this work through the adoption of the SLO CAL Welcome customer service training module designed specifically to build higher awareness and understanding of EDI principles.

Targeting More Diverse Audiences Through PR & Marketing Efforts

Visit SLO CAL is working in partnership with MMGY NJF, MMGY Hills Balfour and The Shipyard to advance public relations and marketing campaigns that remain focused on SLO CAL's diverse marketplace audiences, and tailoring 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 & Team Training

Visit SLO CAL's board of directors and team are committed to being lifelong learners. In FY 24, 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.

Objectives

- · Position Visit SLO CAL as a leader in the EDI travel and tourism space
- · Further refine and enhance Visit SLO CAL's Equity, Diversity & Inclusion Plan
- · Collaborate with local destination partners and individual municipalities to authentically target and attract diverse audiences
- · Amplify the voices of women-owned and minority-owned local travel and tourismrelated businesses

Strategies

- · Amplify SLO CAL's diverse assets and continue to raise awareness, increasing representation and inclusion
- · Widen VSC's narrative to publications and professionals who offer diverse perspectives and authentic voices
- · Prioritize expanding relationships with EDIfocused 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
- · Educate Visit SLO CAL staff, board of directors and marketing committee on relative EDI topics

Key Results

- · Meet quarterly with three EDI-focused, local agencies
- · Partner with ANA (Association of National Advertisers) to host a mandatory training program for Visit SLO CAL staff, board of directors and marketing committee designed to provide a universal level of understanding on
- · Expand content library of women and minority

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Advocacy

Advocacy plays an important role in protecting and advancing the tourism economy in SLO CAL, across California and in the United States. The last few years continued to shine a light on the industry's universal need to educate lawmakers and stakeholders about the important contributions of tourism to our economy. Travel and tourism made up 10 percent of San Luis Obispo County's GDP in 2022. The industry puts 22,000+ people to work each day in SLO CAL. Travel matters to every industry; no industry can survive without travel, and advocacy helps to tell that story.

Visit SLO CAL advocates for local, state and federal policies that enhance the region's economic vitality and resident quality of life. VSC ensures the tourism industry's perspectives are being considered when key policy issues are being discussed and works collaboratively with partners and stakeholders to develop innovative, sensible policy solutions. In FY 24, Visit SLO CAL's President & CEO, Chuck Davison, will become the chairman of the board of the California Travel Association, the state's largest tourism advocacy group.



Objectives

- Increase awareness and advancement of Visit SLO CAL as an influential advocacy organization representing the interests of the tourism industry
- Increase resident awareness of Visit SLO CAL's work and the economic, cultural and lifestyle benefits generated from a vibrant tourism industry

Strategies

- Advance SLO CAL's tourism influence with lawmakers, regulators, government officials and agencies through collaborative advocacy efforts
- Collaborate with tourism and economic development partners, with aligned interests and shared policy priorities, to advance opportunities that have a direct economic impact on tourism and to overcome longerterm regional challenges impacting the industry and quality of life in SLO CAL
- Broaden awareness of the importance of tourism on the SLO CAL economy by advancing engagement with investors, partners, stakeholders and residents

- Develop a long-term advocacy platform by October 31, 2023, including pillars to guide collaborative advocacy efforts and communications strategies to amplify policy positions, advance messaging and create influence
- Create and launch an advocacy toolkit by January 31, 2024, to advance advocacy for the tourism industry
- Leverage FY 23 resident sentiment benchmark to inform and build a communications strategy by December 31, 2023, that increases local understanding of the positive impact tourism has on the community
- Meet with and onboard newly elected city and county officials by February 2024
- Conduct a SLO CAL Global Sustainability
 Tourism Council Assessment by March 31, 2024
- Host semi-annual Hospitality Roundtable Briefings with state and federal elected representatives (Congress, State Senate and State Assembly) by June 30, 2024
- Create a regional tourism industry workforce strategy roadmap by June 30, 2024



Engage With Visit SLO CAL

Sales

Visit SLO CAL provides free and paid opportunities for lodging investors and partners to build relationships and increase exposure through participation in industry trade shows, sales missions and FAM tours, and through SLOCAL.com.

For more information on the opportunities below, please visit SLOCAL.com/partners or email Sales@SLOCAL.com.

Tour & Travel

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

Tour & Travel FAM (Familiarization) Tours / Ongoing

FAM tours acquaint tour operators 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 / Lodging Investors / Destination Partners

Join Visit SLO CAL on a sales mission to Southern or Northern California. Meet with inbound and receptive tour operators from SLO CAL's top markets to build relationships and gain potential sales opportunities. To maximize exposure, VSC limits attendance to three lodging investor/destination partners per mission.

IPW / May 5-8, 2024 / Lodging Investors / Destination Partners

Join Visit SLO CAL as a booth partner in a 10' x 50' destination showcase at IPW, the largest tour and travel trade show in North America. During the three-day trade show in Los Angeles, co-op partners meet and network with tour companies from SLO CAL's top international markets. Co-op partners will have exclusive access to all notes and leads for 30 days following the show before those leads are distributed to lodging investors countywide. To maximize exposure, VSC limits attendance to eight lodging investor/destination partners for this show.

Meetings & Conferences

With something for everyone, SLO CAL makes the ideal setting for any kind of meeting or conference. VSC's dedicated sales department works directly with organizations and third-party meeting planners to create opportunities for lodging investors to host meetings.

CalSAE Season Spectacular / December 2022 / \$1,000 / Lodging Investors / Destination Partners

Meet with over 30 California association meeting and event planners in Visit SLO CAL's destination showcase booth in Sacramento, California. In order to maximize exposure, VSC limits attendance to five lodging investor/destination partners for this show.

Meeting & Conference Sales Missions / \$250 / Lodging Investors / Destination Partners

Travel with Visit SLO CAL to Northern California to meet with meeting planners to learn how your property can help them achieve event goals and objectives. In order to maximize exposure, VSC limits attendance to three investor/destination partners per mission.



Marketing

Visit SLO CAL provides a variety of marketing opportunities that are tailored to partners' specific goals. For more information on the opportunities below, visit SLOCAL.com/Partners or email Marketing@SLOCAL.com.

CrowdRiff

CrowdRiff allows organizations to effectively discover and activate engaging visual content from social media platforms while inspiring conversations with potential visitors. In addition, CrowdRiff provides Visit SLO CAL with 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.

Official Visitors Magazine

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 2023.

Features 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. To subscribe, go to SLOCAL.com/Partners.

Public Relations

Visit SLO CAL works with domestic and international journalists on stories covering SLO CAL as a primary travel destination. VSC provides investors and partners the opportunity to offer discounted or complimentary products for media FAM tours to have a better chance at being featured in media coverage and media leads for submission collaboration. For more information, please visit SLOCAL.com/Media, or reach out to Media@SLOCAL.com.

Familiarization (FAM) Tours & Individual Press Trips

FAM tours are offered to media to familiarize journalists with SLO CAL's experiences and offerings with the ultimate objective to earn media coverage. Host a journalist at your business in hopes of gaining valuable media exposure.

Media Pitches & Leads

Respond to media pitches and leads anytime through postings in the weekly partnership newsletter This Week In SLO CAL. Domestic leads are offered by PR agency MMGY NJF and Visit California, while international leads come from VSC's international agency MMGY Hills Balfour. To subscribe to This Week in SLO CAL, visit SLOCAL. com/Partners.

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. To be considered for directory listings for locations, film crew or talent engage at FilmSLOCAL.com or email Film@SLOCAL.com.

Film Scout FAM Tours

Film SLO CAL hosts film industry professionals and scouts on an annual group FAM tour. If you are interested in showcasing your venue on this tour and providing an experience, send your information to Film@SLOCAL.com.

Engage with Visit SLO CAL Continued

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 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.

Community Benchmark - Wine Industry Report / Monthly

VSC has partnered with Paso Robles Wine Country Alliance and Community Benchmark to be the first DMO to offer through Tourism Economics a detailed report of wine sales, tasting room visitation and how it compares to the other wine regions in California.

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 priorities are genuinely considered on issues that impact the industry. For more information on the advocacy opportunities please visit SLOCAL.com/Partners or reach out to Advocacy@SLOCAL.com.

US Travel Association / Destination Capitol Hill / April 2024

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 by contacting Advocacy@ SLOCAL.com to ensure a discounted rate.

Partnership

SLO CAL Connection

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 featuring your business and network with the community. To sign up for a SLO CAL Connection account, visit SLOCAL.com/Partners or reach out to Partnership@SLOCAL.com.

SLO CAL Crafted

SLO CAL Crafted celebrates the high quality of local products made, farmed and crafted in SLO CAL. To be certified as a SLO CAL Crafted partner, businesses must be headquartered in SLO CAL, have primary design and manufacturing done in SLO CAL, sell products through a brick and mortar or retail location in SLO CAL, have at least one full-time employee based in SLO CAL, and create a uniquely local product, experience or service that enhances tourism in SLO CAL. Partners will be given opportunities for additional exposure by certifying as SLO CAL Crafted (at no charge). For more information email Marketing@SLOCAL.com.









SLOCAL.COM 805-541-8000





