

ANNUAL REPORT

FY 2021



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Visit SLO CAL (VSC) is a team of destination marketing professionals who work with, and on behalf of, our community, our local partners and our investors to promote SLO CAL® (San Luis Obispo County, California) to both domestic and international visitors. As the countywide non-profit 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 also 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.

LETTER FROM THE PRESIDENT & CEO

Dear Visit SLO CAL Investors, Partners & Stakeholders,

As we wrap up FY 2021, we'd like to take a moment to reflect on all that has been accomplished.

While this past year has had its own unique challenges, SLO CAL has outperformed its competitive set of Santa Barbara, Monterey, Napa and Sonoma in almost every way. Occupancy, average daily rate (ADR) and revenue per available room (RevPAR) all, on average, recovered better in SLO CAL than in those other markets. We advertised when the timing was right, launching a \$1.8 million campaign that included \$1 million in media placements from February to June.

Along the way, we actively supported the industry, weathering a sudden Highway 1 closure, supporting our investors, partners and stakeholders with directional resources for consumers; successfully advocating for vaccine allocations for hospitality workers; informing and assisting our investors and partners throughout the reopening process; and providing a unified voice to advocate for the needs of our industry. We partnered with Xplorit, an award-winning virtual site inspection company, to create a fully immersive destination experience that will launch in winter 2021 and will feature all of our local destinations. We also welcomed new direct air service from Portland and the relaunch of direct service from San Diego.

Equity, diversity and inclusion (EDI) efforts have remained a key priority for us as we work to build a more inclusive organization and destination and bring the authentic faces and stories of our community to life through our marketing efforts. In June, we initiated a combined EDI Audience and Asset Alignment Study and Future Visitor Profile Study with SMARInsights to inform our future work.

In preparation for FY 2022, we hired the gold standard in California tourism marketing—Mering—as our agency of record and added Cathy Cartier, one of the sharpest minds in destination marketing, as chief marketing officer. Mering will lead the evolution of the SLO CAL brand through a countywide asset production shoot as we work to capture new still images and video. These efforts will pave the way for the launch of our most ambitious advertising and marketing campaign to date, a \$2.6 million feeder market advertising spend, complementing an aggressive sales strategy.

We will also continue to advance key Experience SLO CAL 2050 initiatives, focused on maintaining and improving resident quality of life while increasing the positive impacts of tourism in SLO CAL.

Although we have faced challenges and uncertainties in the midst of COVID-19, we are proud of the accomplishments of this past year. Together we are building a more resilient tourism industry and we are excited to partner with you in these efforts!

All the best,



Chuck Davison, CDME
President & CEO
Visit SLO CAL



BOARD, COMMITTEES & TEAM

BOARD OF DIRECTORS

CLINT PEARCE

Chair | Madonna Enterprises | Atascadero, San Luis Obispo
Elected Designated At-Large Seat (—June 2022)

HEMANT PATEL

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

MARK EADS

Secretary | SeaVenture Beach Hotel | Pismo Beach
Elected Designated At-Large Seat (—June 2022)

AARON GRAVES

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

AMAR SOHI

At-Large Member | Holiday Inn Express Hotel & Suites | Atascadero
Appointed Atascadero Seat (—June 2023)

ALMA AYON

Sundance Bed & Breakfast | Paso Robles
Elected Designated Bed & Breakfast Seat (—June 2024)

JEDIDIAH BICKEL

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

KATHLEEN BONELLI*

Paso Robles Vacation Rentals | Paso Robles
Elected Designated Vacation Rental Seat (—June 2022)

JOHN CONNER

Petit Soleil | San Luis Obispo
Appointed San Luis Obispo Seat (—June 2023)

JIM HAMILTON

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

JAY JAMISON

Pismo Coast Village | Pismo Beach
Elected Designated RV Park Seat (—June 2022)

TONI LEGRAS

Beachside Rentals | Unincorporated Area
Appointed Unincorporated Area Seat (—June 2022)

SAM MILLER

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

AMIT PATEL

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

NIPOOL PATEL

Lamplighter Inn & Suites | San Luis Obispo
Elected Designated At-Large Seat (—June 2022)

VICTOR POPP

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

Open Seat | Arroyo Grande

Appointed Arroyo Grande Seat (—June 2021)

MARKETING COMMITTEE

ASHLEE AKERS

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

JIM ALLEN

Director of Marketing & Communications | Hearst Castle (—June 2022)

AUDREY ARELLANO

Brand Manager | Cambria Inns Collection (—June 2023)

TERRIE BANISH**

Deputy City Manager—Marketing/Promotions/Events | City of Atascadero

JOCELYN BRENNAN**

President & CEO | South County Chambers of Commerce

MOLLY CANO**

Tourism Manager | City of San Luis Obispo

CHERYL CUMING**

Chief Administrative Officer | Unincorporated CBID

GORDON JACKSON**

Executive Director | Pismo Beach CVB

STACIE JACOB**

Executive Director | Travel Paso

LORI KELLER

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

KATHLEEN NAUGHTON

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

JOEL PETERSON

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

LINDSEY ROBERTS

Director of Marketing | Martin Resorts (—June 2024)

JOHN SORGENFREI

President & Owner | TJA Advertising (—June 2022)

JILL TWEEDIE

Founder & President | Breakaway Tours Wine & Events (—June 2022)

MICHAEL WAMBOLT**

Executive Director | Visit Morro Bay

*Resigned September 2021 **Destination Partner

TEAM



CHUCK DAVISON
President & CEO



CATHY CARTIER
Chief Marketing Officer



BRENDAN PRINGLE
Director of Operations



VANESSA RODRIGUEZ
Digital Marketing Manager



KYLA BOAST
Associate Director of Sales



ASHLEY MASTAKO
Partner Engagement Manager



MELISSA MURRAY
*Project Manager,
Destination Management*



ERIC PARKER
Digital & Marketing Specialist

NOT PICTURED

ANNIE FREW
*Director of Community
Engagement & Advocacy*

KATIE LOVELACE
Brand Marketing Coordinator

ADVISORY COMMITTEE

WADE HORTON
County Administrative Officer | County of San Luis Obispo

LYNN COMPTON
Supervisor, District 4 | County of San Luis Obispo

WHITNEY MCDONALD
City Manager | City of Arroyo Grande

LAN GEORGE
Councilmember | City of Arroyo Grande

RACHELLE RICKARD
City Manager | City of Atascadero

HEATHER NEWSOM
Mayor Pro Tem | City of Atascadero

MATTHEW BRONSON
City Manager | City of Grover Beach

DANIEL RUSHING
Councilmember | City of Grover Beach

SCOTT COLLINS
City Manager | City of Morro Bay

RED DAVIS*
Councilmember | City of Morro Bay

GREG CARPENTER
Interim City Manager | City of Paso Robles

STEVE MARTIN
Mayor | City of Paso Robles

JIM LEWIS
City Manager | City of Pismo Beach

SCOTT NEWTON
Councilmember | City of Pismo Beach

DEREK JOHNSON
City Manager | City of San Luis Obispo

HEIDI HARMON**
Mayor | City of San Luis Obispo

**In memoriam **Resigned August 2021*

STRATEGIC DIRECTION 2023

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



VISION

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



MISSION

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



VALUES

STEWARDSHIP

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

AUTHENTICITY

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

INCLUSION

We engage and collaborate with an array of voices and perspectives

DRIVE

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

FUTURE FOCUS

We deliver today with an innovative eye on tomorrow



REPUTATION

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



POSITION

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

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



IMPERATIVES

Enhance Our Organizational Capacity and Culture

INITIATIVES

- Assess and refine interdepartmental communication and processes
- Develop and enable our team
- Foster an engaged and focused team culture

OBJECTIVES

- Increase mean Employee Engagement score to 3.85
- Return ratio of administrative cost to economic impact to 2019 level or higher
- Increase Team Net Promoter score to 11 or higher, and maintain
- Increase Whole Systems mean score on Systems and Processes and Capabilities and Talent sections to 3.25

Amplify and Steward the SLO CAL Brand Through Unified Efforts

INITIATIVES

- Execute a “house of brands” strategy that honors the experiences of our individual destinations
- Increase share of voice and intent to travel through targeted media strategies
- Target and nurture marketing partnerships that increase our brand awareness

OBJECTIVES

- Increase SLO CAL brand awareness year over year, as measured by advertising effectiveness and ROI (Return on Investment) study
- Increase length of stay by 0.2 days over 2019, as measured by Arrivalist
- Increase cross-visitation to 2 communities per unique arrival, as measured by Arrivalist
- Achieve mean MPV (Marketing Partnership Value) score of 4

Lead the County Tourism Industry in a Collaborative Resilience Planning Effort

INITIATIVES

- Define and activate pathways to accelerate recovery for our tourism industry
- Develop mechanisms to quickly gather, report and leverage crisis-related data
- Foster long-term resilience for our tourism industry

OBJECTIVES

- Restore annual visitor volume with growth 10% or more above statewide growth, per Visit California numbers
- Restore total air service to 80% of 2019 baseline or higher
- Outperform California tourism recovery by 5%, per Dean Runyan Economic Impact Report

Demonstrate Value to Investors, Partners, Stakeholders and Communities

INITIATIVES

- Build local awareness of Visit SLO CAL and its positive impacts
- Increase opportunities for engagement with our investors, partners and stakeholders
- Innovate in development of data resources for our tourism community
- Advance advocacy efforts to promote the value of tourism

OBJECTIVES

- Foster balanced year-over-year growth of engagement in Visit SLO CAL opportunities
- Increase investor/partner/stakeholder Net Promoter Score by 5% year-over-year
- Secure at least two local media articles annually that receive a perfect score of 10 using the Barcelona Principles scoring rubric
- Maintain community acceptance of tourism survey score at or above 2018 baseline

COVID-19 RESPONSE



As the industry navigated the impact of the COVID-19 pandemic, Visit SLO CAL worked closely with their investors, partners and stakeholders, keeping them informed with the latest guidelines and data insights and advocating on their behalf. When the county reopened, VSC boosted their spring media spend to position the industry for success.

RELAUNCH & RECOVERY

VSC communicated closely with county officials as the organization relaunched paid media efforts, aligning this relaunch with that of Visit California. As part of the FY 2021 budget reforecast, and in an effort to advance tourism recovery, VSC reallocated \$600,000 in surplus funds conserved during the pandemic to increase their total spring media budget, spending over \$1 million on media from February to June. Additionally, VSC applied for and received more than \$151,000 in PPP funding to offset operational expenses, allowing the organization to shift additional revenue toward recovery efforts.

ADVOCACY

VSC continued their regular contact with county leadership regarding the impact of the pandemic on the tourism industry and worked diligently over the course of several months on designated vaccine prioritization and appointments. In January, VSC partnered with CalTravel to advocate for the development of a statewide reopening plan for meetings and conferences, contributing to the sponsorship of a strategic communication consultant. In April, VSC reached an agreement with the County to offer 1,200 lodging-employees-only vaccine time slots, which was later extended to employees of wineries, breweries, distilleries, attractions and other hospitality partners. Staff aggressively advocated for a tourism recovery stimulus at the state level, which was ultimately added to the state budget in the form of a \$95 million stimulus.



DATA INSIGHTS

VSC worked with Tourism Economics to develop and refine a new monthly report focused specifically on the SLO CAL tourism industry's recovery and how it compares with the destination's competitive set. The COVID-19 Recovery Tracker is accessible to investors, partners and stakeholders through their SLO CAL Connection portal.

INVESTOR, PARTNER & STAKEHOLDER COMMUNICATION

VSC closely monitored San Luis Obispo County's COVID-19 reporting metrics and state guidelines in order to provide immediate email updates to investors and partners as tier changes were announced by the governor, and continued to offer resources throughout the phased reopening process. VSC hosted regular SLO CAL Tourism Task Force calls with local destination partners and wine association leaders to communicate key updates and to ensure that countywide marketing, communications and advocacy efforts were fully aligned. VSC also developed a jobs board for investors and partners to get the word out in the face of a critical hospitality labor shortage.

LODGING DAYS: VACCINE APPOINTMENTS SPECIFICALLY AVAILABLE FOR SLO COUNTY LODGING EMPLOYEES TO STAY OPEN AND SAFE

In an effort to ensure lodging workers can get the COVID-19 vaccine, Visit SLO CAL and the County are partnering to coordinate large blocks of free vaccine appointments specifically for the lodging community. Appointments will be available during designated days and times for lodging employees only. These lodging appointment events will include Spanish-language and Mixteco-language interpreters who work closely with Latinx and Indigenous communities.







Lodging employees can register today for their free first vaccine dose at the QR Code above for one of the following dates and locations:

- TUESDAY 4/13, 9-11am- at Cuesta College Clinic, Hwy 1, San Luis Obispo (400 appointments available) – Johnson & Johnson one dose vaccine
- WEDNESDAY 4/14, 9-11am- at Arroyo Grande Clinic, 800 W. Branch St. AG (400 appointments available) – Johnson & Johnson one dose vaccine
- TUESDAY 4/20, 9-11am- at Paso Robles Events Center, 2198 Riverside Ave, Paso Robles (400 appointments available) – vaccine type TBD*
- WEDNESDAY 4/21, 9-11am- at TBD (400 appointments available) – vaccine type TBD*

Please note: a medical form will be available to fill out when you register for your appointment. To make your appointment as efficient as possible, please fill out the medical form prior to your scheduled time and bring it to your appointment. If employees need help with the form, the on-site interpreters can help. For questions about the Lodging Days program, please call Visit SLO CAL at (805) 541-8000 x109

WHY TOURISM MATTERS

CY 2020 IMPACTED BY COVID-19

TRAVEL spending
\$1.19B

\$3.3M
a day

\$136K
an hour

\$2.3K
a minute

\$38
a second



TOURISM PUTS



10,450

PEOPLE TO WORK EACH DAY

TOURISM CONTRIBUTED

\$35.9M



15.6%
YOY DECREASE

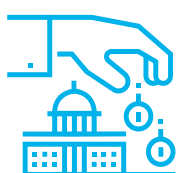
IN TRANSIENT OCCUPANCY TAX REVENUE



OUTPALED
STATEWIDE
TOURISM
RECOVERY by 25%

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



\$1,113 in taxes

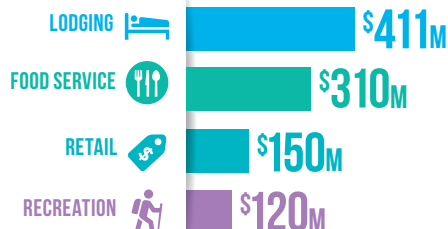


INDUSTRY

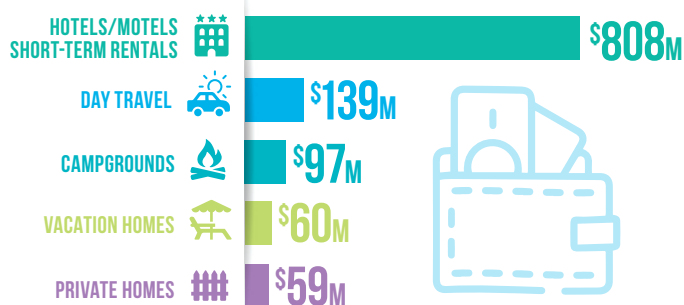
earnings

\$661M

DIRECT SPENDING BY SECTOR



DIRECT SPENDING BY ACCOMMODATION TYPE



TRAVEL
SPENDING
CREATED

\$66M

IN DIRECT
COMMUNITY
INVESTMENT

which could cover the expenses for

614 POLICE OFFICERS' SALARIES

OR

760 FIREFIGHTERS' SALARIES

OR

1,401 TEACHERS' SALARIES

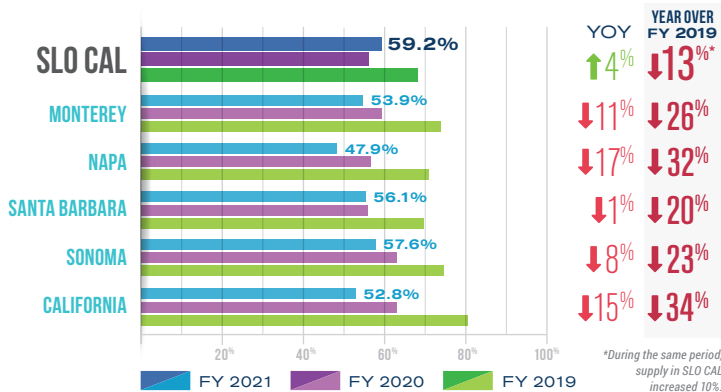
OR

106 MILES OF 2-LANE RESURFACED ROADS

TOURISM
COMPRISES

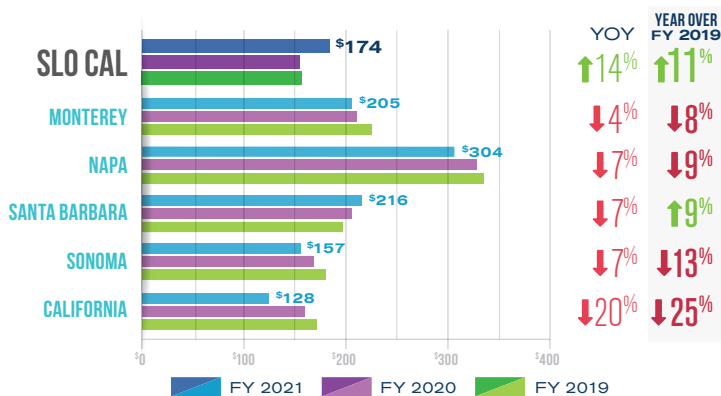
6.0% OF COUNTYWIDE GDP

HOTEL OCCUPANCY (OCC)

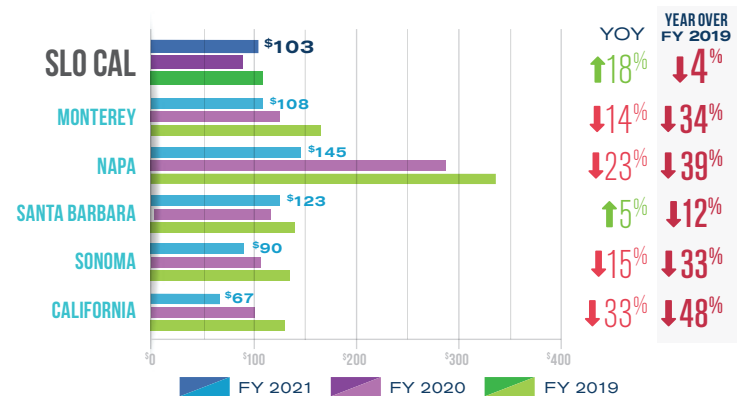


FY 2021 COMPARISONS

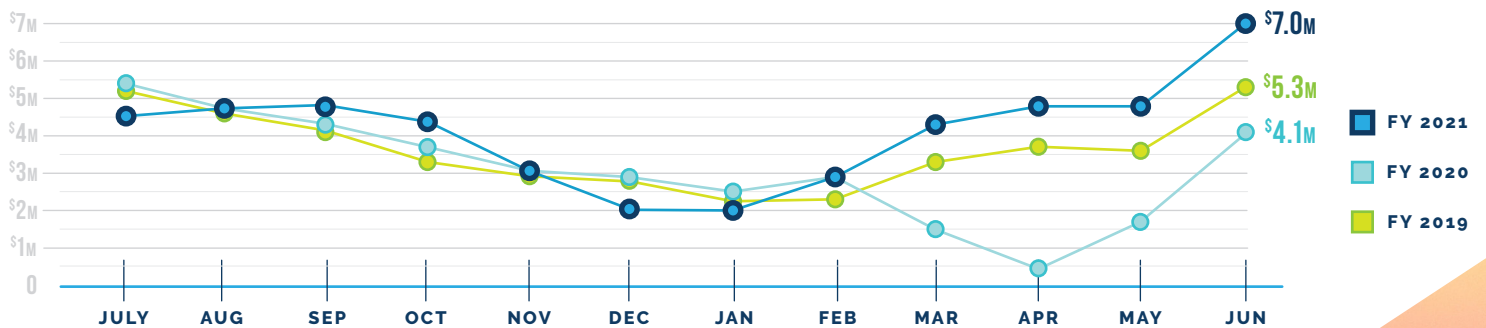
AVERAGE DAILY RATE (ADR)



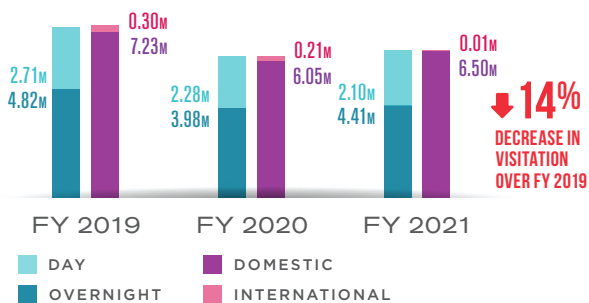
REVENUE PER AVAILABLE ROOM (REVPAR)



TRANSIENT OCCUPANCY TAX (TOT)



VISITOR VOLUME



SALES

In FY 2021, Visit SLO CAL shifted their traditional sales strategy to a more in-state approach, targeting California state and regional associations and corporate businesses in SLO CAL's drive markets. Additionally, VSC shifted their international tour and travel sales efforts to focus on educating tour operators and travel advisers who sell domestic travel to California. VSC's partnership with Black Diamond in the UK and Ireland was put on hold as international travel remained closed.

EVENTS*

2020 SEPTEMBER

GoWest Summit (Fall)**

OCTOBER

AG & Culinary Destination Presentation

Travel Weekly's Western U.S. Travel Agent Trade Show

NOVEMBER

National Tour Association's Travel Exchange

DECEMBER

Luxury Travel Forum (Winter)

CalSAE Seasonal Spectacular

2021 MARCH

GoWest Summit (Spring)

UK Spotlight (Sales Mission)

APRIL

Luxury Travel Forum (Spring)

Mexican Buyers Spotlight (Sales Mission)

MAY

UK Virtual Familiarization Tour

AAA AdventureFest

29
APPOINTMENTS

6
VIRTUAL
TRADE SHOWS

191
LEADS***

396
BUYERS TRAINED

11
DIRECT ROOM
NIGHT
CONTRACTS

*All FY 2021 trade programs were virtual.

**GoWest 2020 was rescheduled from March 2020 to September 2020 due to COVID-19.

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



EARNED MEDIA

In FY 2021, Visit SLO CAL worked hand in hand with Visit California, local destination partners, investors and partners to engage with members of the press through drive market and national media mailers, Instagram takeovers of editorial outlets, proactive pitching, individual familiarization (FAM) tours and a Portland influencer FAM. VSC partnered with TURNER PR domestically to increase SLO CAL's share of voice, generating more than \$5.5 million in earned media value. Earned media efforts focused on key regional drive markets due to the COVID-19 pandemic. As with sales, international PR efforts were put on hold as international travel was closed.

NOTABLE ARTICLES

DOMESTIC



134 ARTICLES

\$5.5M AD VALUE EQUIVALENCY

1.4B IMPRESSIONS

LOCAL



22 ARTICLES

\$67k AD VALUE EQUIVALENCY

7.3M IMPRESSIONS

TOTAL

156 ARTICLES

\$5.6M AD VALUE EQUIVALENCY

1.4B IMPRESSIONS

AZ CENTRAL

"Driving California Highway 1: Best Things to Do Near San Luis Obispo"

TRIPSAVVY

"The Best Small Town in Every State"

LONELY PLANET

"Relax and De-Stress at These 9 Top California Hot Springs"

LOS ANGELES TIMES

"Stunning Views, Miles of Trails Greet Hikers at Pismo Beach's Newest Preserve"

TRAVEL + LEISURE

"California's Rugged Central Coast Is a Bird-watcher's Paradise"

THRILLIST

"14 Reasons to Drive to San Luis Obispo"

USA TODAY

"With Vaccinated Grandparents, Skip-Gen Vacations are Gaining Popularity"

AFAR

"Why Cambria Is Central California's Most Relaxing Weekend Break"

THE NEW YORK TIMES

"Immerse Yourself in Indigenous Culture"

SFGATE

"A California Pasta Destination That's Breaking From the Old World Mold"

azcentral.

tripsavvy



Los Angeles Times

TRAVEL+
LEISURE

thrillist

USA TODAY

AFAR

The New York Times

SFGATE

Portland Influencer FAM

To promote the new direct flight service from Portland to SLO CAL, Visit SLO CAL invited five select Portland influencers to be passengers on the June 17 inaugural flight and share their journey with their fans. The PDX influencer program saw great results. Combined social media efforts totaled 174 Instagram posts, 226,000 impressions, a 12.82% engagement rate and 10,900 total engagements, which increased both the visibility and positioning of SLO CAL as an accessible destination for Portlanders.



OWNED MEDIA



In FY 2021, Visit SLO CAL leaned heavily on compelling visuals to inspire, educate and engage travelers. Video promotions using local, authentic storytelling were shared simultaneously across all social channels and included links back to SLOCAL.com to capture user engagement and facilitate partner handoffs. When faced with advertising restrictions at the peak of the pandemic, owned channels remained on and pivoted to dreaming of future leisure travel to SLO CAL.

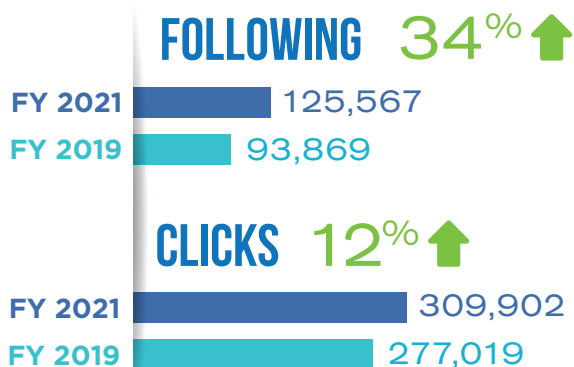
FY 2021 SLOCAL.COM SNAPSHOT



*Tracking for engaged sessions was not implemented in FY 2019.

**A scroll tracking issue in 2019 was artificially lowering the bounce rate, so there is not an accurate comparison to FY 2019. However, the bounce rate is in line with the destination marketing organization industry average.

SOCIAL



INDUSTRY TERMS

Sessions: A group of user interactions with a website that takes place within a given time frame

Bounce Rate: The percentage of sessions to the website that navigate away from the site after the user views only one page

Engaged Session: A website session (on SLOCAL.com) that has met the following criteria: Session duration is greater than 90 seconds, and user has done at least one of the following: 1) visited two or more pages during the session, 2) subscribed to the eNewsletter, 3) requested a Visitor Magazine, 4) clicked "Visit Website" or "Book Now," or 5) clicked on the phone number on a partner listing

Qualified Session: A website session (on SLOCAL.com) that has met the following criteria: User subscribed to the eNewsletter or requested a Visitor Magazine or clicked "Visit Website" or "Book Now" or clicked on the phone number on a partner listing

Partner Referral: A click on a partner link, or the "Visit Website," "Book Now," or phone number on the partner listing

PAID MEDIA

Visit SLO CAL worked closely with Miles Partnership to execute an always-on and phased-recovery approach to paid advertising efforts during the pandemic. By shifting the focus away from targeting specific personas (Active Adventurer, Mom to the Max and Cultured Class), the campaign targeted a more qualified audience with the highest propensity to travel. To create greater cost-efficiencies while being mindful of recovery, target markets shifted to California drive markets and prioritized Los Angeles and San Francisco. VSC participated in fall and spring co-ops with Visit California (VCA) and incorporated VCA's trip motivators of Recharge and Immerse into all tactics of their overall campaign. As a preliminary phase in our House of Brands strategy, VSC added geotag locations in advertisements to showcase featured locations.

According to Arrivalist, in FY 2021, paid media resulted in an 85% lift in arrivals and a 18.2% lift in length of stay compared to the control group that was not exposed with the campaign.

FY 2021 PAID MEDIA SNAPSHOT

\$1.8M
SPEND

1.1M
CLICKS

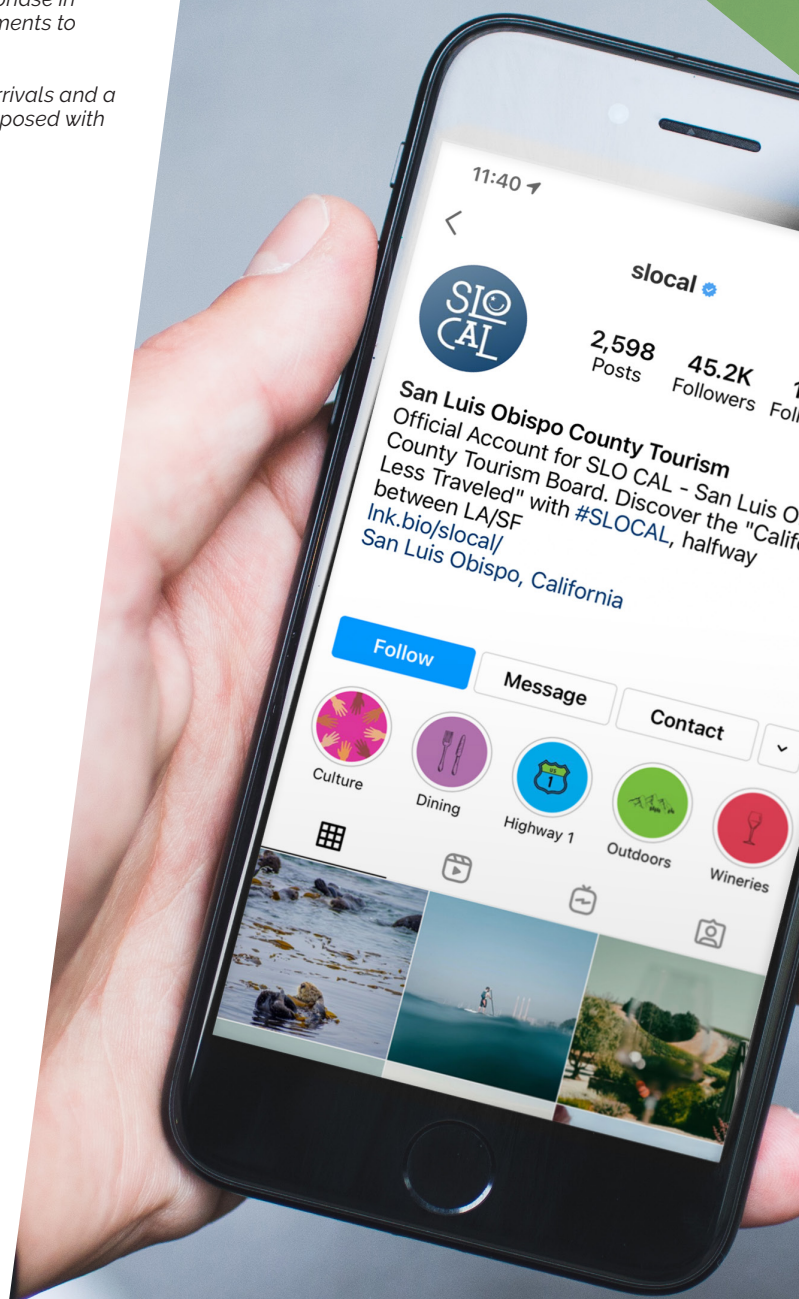
131k
IMPRESSIONS

98% **7% ↑**
OVER FY 2019
CONNECTED TV VIDEO
COMPLETION RATE

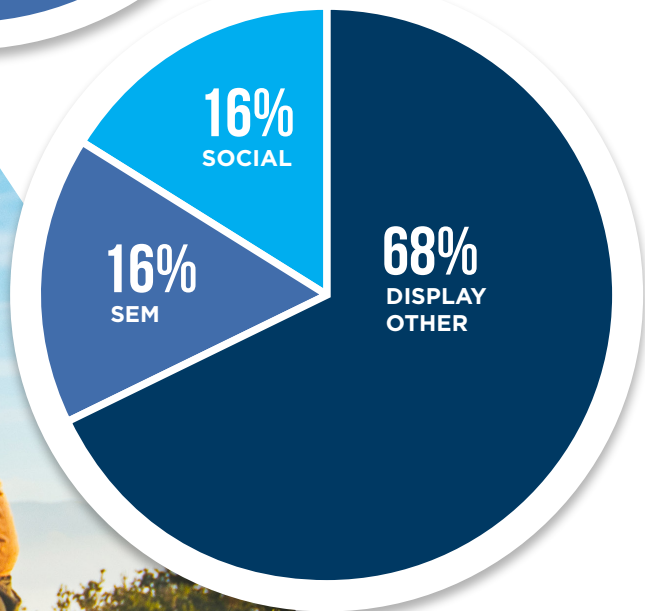
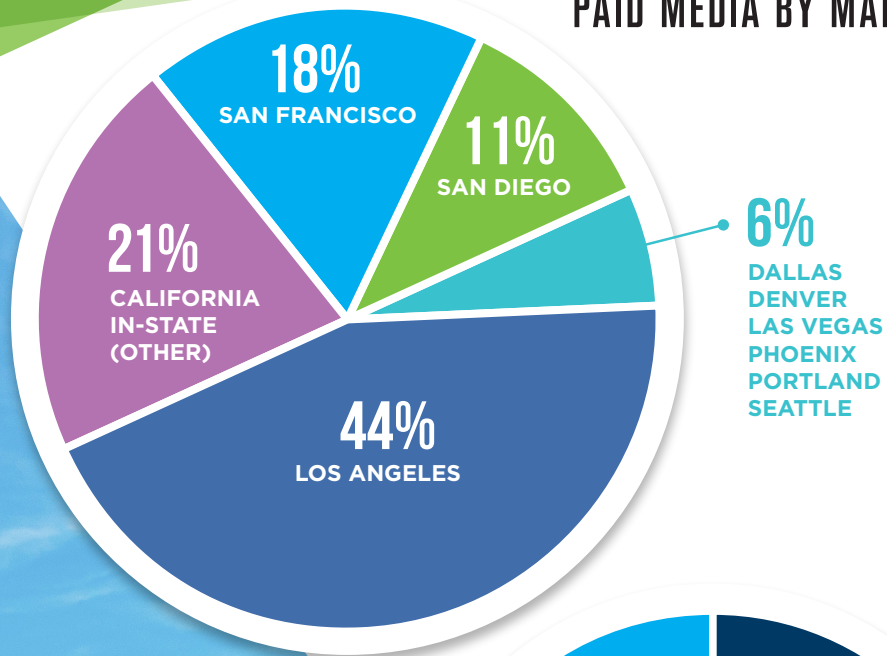
\$0.84 **23% ↓**
OVER FY 2019
OVERALL COST PER
LANDING PAGE ON SOCIAL

2.58% **24% ↓**
OVER FY 2019
SEM CLICK-THROUGH RATE

\$1.80 **13% ↓**
OVER FY 2019
SEM COST PER CLICK



PAID MEDIA BY MARKET

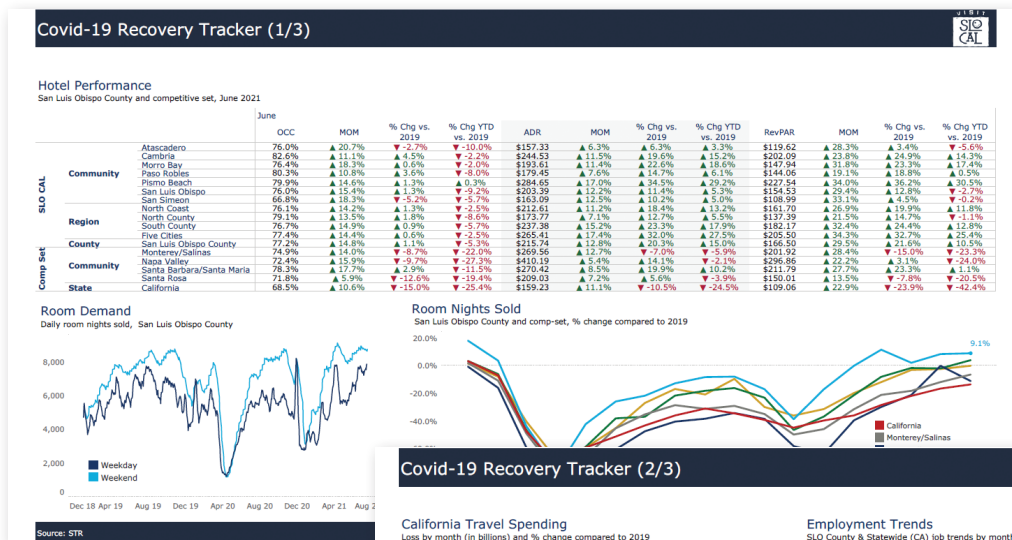


BREAKDOWN BY CHANNEL

TOURISM DATA INSIGHTS

Visit SLO CAL has continued to leverage their partnership with Tourism Economics to aggregate new and existing data sources into monthly business intelligence reports on their Symphony platform, informing the tourism industry with insightful visualizations in monthly reports. In November, VSC launched a new report, the COVID-19 Recovery Tracker, to track SLO CAL's recovery against its competitive set, and established new data streams. VSC worked with local municipalities and the county to secure data on transient occupancy tax (TOT) by community that segments the unique lodging mix (hotels and motels, short-term rentals, bed and breakfasts, and RV parks) and worked separately with Community Benchmark and Paso Robles Wine Country Alliance to secure wine industry data for new reports launching in FY 2022.

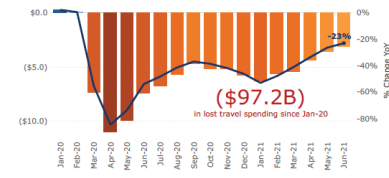
COVID-19 RECOVERY TRACKER



Covid-19 Recovery Tracker (2/3)

California Travel Spending

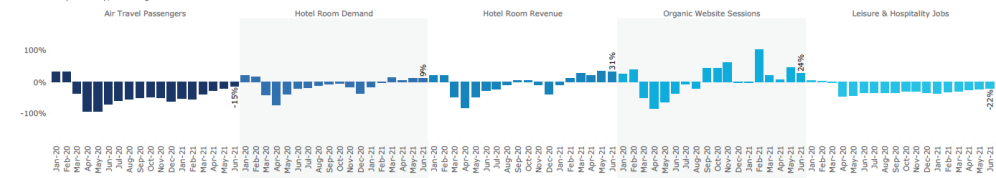
Loss by month (in billions) and % change compared to 2019



Source: Tourism Economics

Recovery Indicators

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



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

Employment Trends

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

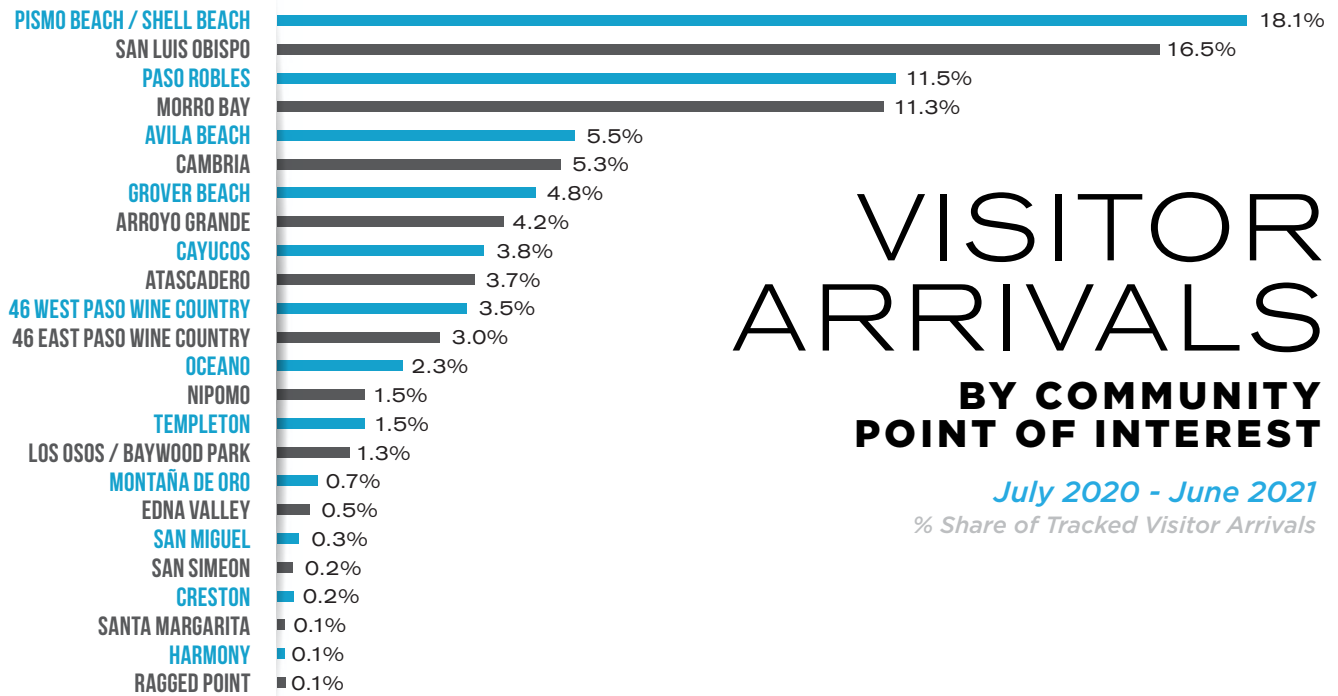
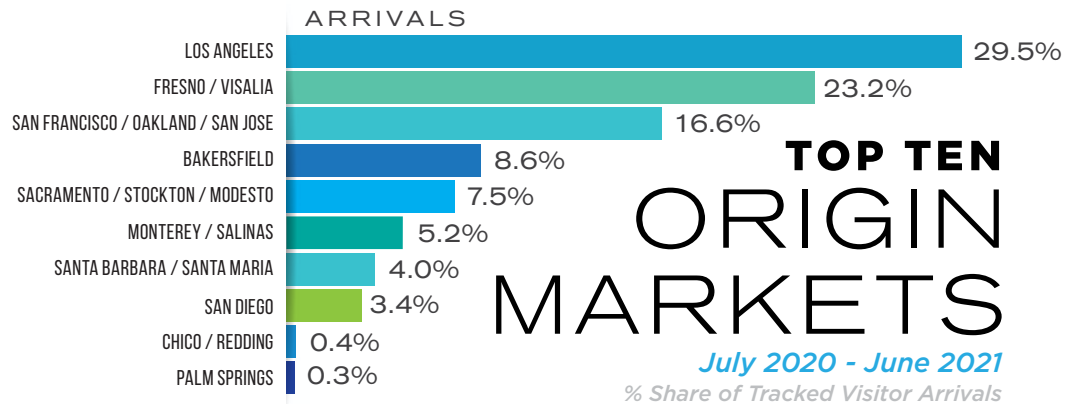
Leisure and Hospitality		Total Nonfarm		Leisure and Hospitality		Total Nonfarm	
SLO County	Statewide (CA)	SLO County	Statewide (CA)	SLO County	Statewide (CA)	SLO County	Statewide (CA)
Jan-20	19.1	2,003.7	118.7	17,481.8	1.6%	2.0%	2.0%
Feb-20	19.4	2,028.3	120.0	17,604.1	1.6%	2.2%	2.0%
Mar-20	18.9	1,998.2	119.4	17,445.9	-0.3%	0.3%	0.3%
Apr-20	14.2	1,443.4	99.1	12,444.9	-26.7%	-10.3%	-11.0%
May-20	14.9	1,476.9	105.6	12,567.9	-13.6%	-10.1%	-10.4%
Jun-20	15.0	1,484.4	105.6	12,567.9	-13.6%	-10.1%	-10.4%
Jul-20	14.9	1,476.9	105.6	12,567.9	-13.6%	-10.1%	-10.4%
Aug-20	15.3	1,540.4	107.3	12,921.7	-11.3%	-9.4%	-9.9%
Sep-20	15.5	1,540.4	107.3	12,921.7	-11.3%	-9.4%	-9.9%
Oct-20	15.5	1,540.4	107.3	12,921.7	-11.3%	-9.4%	-9.9%
Nov-20	15.5	1,540.4	107.3	12,921.7	-11.3%	-9.4%	-9.9%
Dec-20	15.0	1,519.2	105.4	12,942.9	-10.1%	-10.4%	-10.3%
Jan-21	15.4	1,540.4	107.3	12,921.7	-11.3%	-9.4%	-9.9%
Feb-21	15.9	1,540.4	107.3	12,921.7	-11.3%	-9.4%	-9.9%
Mar-21	15.9	1,540.4	107.3	12,921.7	-11.3%	-9.4%	-9.9%
Apr-21	14.4	1,443.4	105.6	12,444.9	-26.7%	-10.3%	-11.0%
May-21	14.4	1,443.4	105.6	12,444.9	-26.7%	-10.3%	-11.0%
Jun-21	14.4	1,443.4	105.6	12,444.9	-26.7%	-10.3%	-11.0%

Source: Bureau of Labor Statistics (BLS)



ARRIVALIST

VSC continues to track arrivals through their partnership with Arrivalist. The Arrivalist A3 platform offers insights on visitor arrivals to San Luis Obispo County and key points of interest (POI), arrival windows, arrival origins, cross-visitation, length of stay and campaign lift as a result of paid media and organic traffic, which informs VSC's advertising efforts.



CROSS-VISITATION

July 2020 - June 2021

1.36 COMMUNITIES PER ARRIVAL

LENGTH OF STAY

July 2020 - June 2021

1.17 DAYS

PARTNER ENGAGEMENT

Visit SLO CAL offered various engagement opportunities to investors and partners throughout the year, including tools and best practices to grow their business, exposure on SLOCAL.com, and opportunities to reach new visitors. In FY 2021, VSC expanded the reach and impact of Restaurant Month and their Google My Business co-op. They also supported investors and partners with resources during the closure of Highway 1 and provided sponsorship funds to support and maintain the California Welcome Center in Pismo Beach.

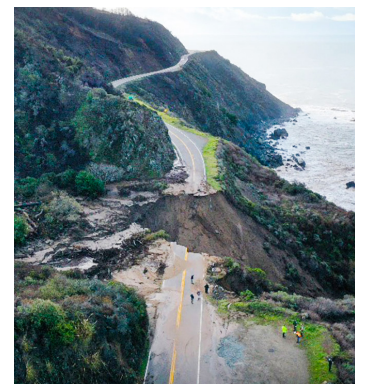
TOURISM ECOSYSTEM

Representing the voice of the larger community, Visit SLO CAL partners with organizations at the state and national levels 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.



HIGHWAY 1 CLOSURE

When the Rat Creek mudslide closed Highway 1 just north of SLO CAL in January, the VSC team quickly reactivated Highway 1 closure information from our 2016-2017 closure playbook, distributing laminated navigational one-sheets to lodging investors, chambers and visitor centers, and adding multilingual resources to SLOCAL.com. The scenic highway fully reopened on April 30.



GOOGLE MY BUSINESS

After hosting multiple educational webinars on Google My Business (GMB) in FY 2020, providing partners with valuable information and tools to claim and optimize their business listings, VSC took this program one step further by partnering with destinations to identify top-priority locations lacking GMB profiles for outreach and funding a five-day, in-market shoot consisting of still shots and 360 photospheres.



CALIFORNIA WELCOME CENTER SPONSORSHIP

When SLO CAL's only California Welcome Center (CWC), one of just 19 in the state, was at risk of closing in FY 2020, VSC's board approved the allocation of sponsorship dollars toward the operation of this important visitor resource. After conducting a detailed RFP process, VSC's board recommended the selection of the South County Chambers of Commerce to manage the CWC. This process culminated in December 2020 with the reopening of the CWC, located in the Pismo Beach Premium Outlets. The new state-of-the-art welcome center provides a digital experience for visitors and highlights all of the destinations within the county. VSC agreed to continue its monthly sponsorship of the CWC in FY 2022.

GOOGLE MY BUSINESS PHOTOSHOOT HIGHLIGHTS

5-DAY **44**
PHOTO SHOOT **LOCATIONS**
8 COMMUNITIES





RESTAURANT MONTH

Visit SLO CAL hosted Restaurant Month throughout January, highlighting SLO CAL's culinary experiences during the shoulder season. Restaurants offered a variety of different deals, including three-course prix fixe meals between \$30 and \$40 and other discounts. This year's campaign included an emphasis on takeout options, as well as a targeted local social campaign and additional advertising to support the restaurant community during the pandemic.



RESTAURANT MONTH FY 2021



12k
SESSIONS

5.3k **↑52% YOY**
PARTNER REFERRALS

44%
CONVERSION RATE

1:37 **↑55% YOY**
AVERAGE TIME
ON LANDING PAGE*



3.7m PAID IMPRESSIONS

145k ORGANIC IMPRESSIONS

38k
CLICKS

275k
ENGAGEMENTS



1m IMPRESSIONS

6 IGTV "TAKEOVERS" FEATURING
5 COMMUNITIES

*Restaurant Month landing page visitors had a session duration of 7:51 and visited 8.06 pages per session on average.

FILM SLO CAL

The film industry drives business to SLO CAL, with productions investing dollars locally and products showcasing the landscapes, lifestyles and experiences of SLO CAL. Film SLO CAL, a division of Visit SLO CAL and the film commission for San Luis Obispo County, promotes, facilitates and tracks filming throughout the county, working to increase the number of productions and resulting economic impact. Many productions were halted or canceled in 2020, resulting in a smaller economic impact than in previous years.

24 PRODUCTIONS

47 FILMING DAYS

61 LEADS

\$589k ESTIMATED SPEND
IN SLO CAL



ADVOCACY

Visit SLO CAL activated their Advocacy Plan throughout FY 2021, focusing their efforts on ease of travel and recovery for the Travel & Tourism industry post-pandemic, ensuring that the industry's voice was represented on issues that mattered to investors and partners.

INDUSTRY ADVISORY GROUP

The VSC team hosted biannual Industry Advisory Group meetings with Assembly Member Jordan Cunningham and Congressman Salud Carbajal, allowing lodging property owners from across the county to voice their priorities and keep the Travel & Tourism industry top of mind at the state and federal levels. Topics of discussion have included state and federal recovery efforts, the infrastructure challenges surrounding Camp Roberts' proposed designation as a migrant children facility, state and federal lodging per diem rates, and legislation impacting the industry.



Industry Advisory Group meeting with Congressman Salud Carbajal

PARTNERSHIP WITH CALTRAVEL

VSC actively partners with California Travel Association (CalTravel) on statewide advocacy efforts. In FY 2021, VSC President & CEO Chuck Davison finished his two-year term as CalTravel's treasurer and served as an at-large executive committee director and as co-chair of their DMO Leader Roundtable.



OCEANO DUNES

Visit SLO CAL advocated against the proposed full closure of the Oceano Dunes State Vehicular Recreation Area (SVRA) in favor of a more balanced solution. VSC asked the California Coastal Commission (CCC) for a stay on the decision until a reliable economic impact assessment was available and the South Central Coast district commissioner was appointed. VSC conducted outreach to the Governor's Office and state representatives, rallied the tourism community and worked with their national PR agency to draft a crisis communications plan on the issue. Despite VSC's best efforts, the CCC decided to phase out OHV at Oceano Dunes in three years. However, at the direction of our board of directors, VSC gained the support of the county of San Luis Obispo and the cities of Arroyo Grande, Grover Beach and Pismo Beach to commission a third-party economic impact analysis, which will provide the community with the necessary data to help guide decision-makers on how to offset the economic losses from the closure of OHV.

MEETING WITH GOVERNMENT OFFICIALS

Staff introduced Visit SLO CAL, virtually and in person, to six newly elected officials and engaged government officials throughout the year on the key issues impacting the industry. As part of U.S. Travel's Destination Capitol Hill, VSC staff participated in virtual meetings with Rep. Salud Carbajal and Sens. Dianne Feinstein and Alex Padilla. In June, VSC co-hosted a tourism industry leader reception with newly appointed California Coastal Commissioner Meagan Harmon, providing an opportunity for coastal lodging owners, general managers, and government officials, to engage with the new commissioner.

CAMP ROBERTS

In April, VSC received notification that Camp Roberts was being considered for a federal government project that would have required accommodations for thousands of proposed government workers for up to 12 months, potentially challenging the industry's recovery. VSC drew awareness with local, state and federal government officials to infrastructure challenges and municipal revenue losses surrounding this proposed project. In June, the federal government announced that it was no longer considering the site.

EQUITY, DIVERSITY & INCLUSION

Visit SLO CAL is committed to taking a leadership role in ensuring that their work helps SLO CAL become a more inclusive destination, so that all who travel into and through the county feel welcomed and embraced. Last June, the board approved Visit SLO CAL's Equity, Diversity & Inclusion (EDI) Plan, committing VSC to several actions affecting all facets of the organization, including building a more inclusive and diverse internal culture, observing commemorative months by featuring SLO CAL's faces and stories, and ensuring assets are authentically representative of SLO CAL's diversity. VSC holds themselves accountable to continuous improvement on equity, diversity and inclusion through a tracking matrix and reporting to the board of directors.

ORGANIZATIONAL CULTURE

In February, three members of the Visit SLO CAL leadership team started a 12-month EDI Leadership Masterclass through Destinations International. Class topics have included emotional intelligence, microaggressions, unconscious bias and allyship. All effective change starts from the top, and the leadership team will leverage these important lessons to influence the organization's internal culture.



OWNED FEATURES

Throughout the year, Visit SLO CAL spotlighted equity, diversity and inclusion on owned channels, with video profiles and promotions pointing back to SLOCAL.com. With the goal of bringing authentic faces and stories of SLO CAL to life, VSC worked with local EDI community-based organizations to promote inclusive cross-visitation opportunities for tourists looking to support Latinx Heritage Month, Women's History Month, Black History Month, Asian American and Pacific Islander (AAPI) Heritage Month, and Pride Month. All EDI-related profiles are featured on a new landing page as well as on highlighted Instagram stories.

EDI AUDIENCE & ASSET ALIGNMENT STUDY

Having a clear picture of the audience that SLO CAL is trying to attract, as well as the product available within the county, is paramount to marketing success. To that end, in June, Visit SLO CAL initiated an EDI Audience and Asset Alignment Study, in conjunction with a Future Visitor Profile Study, through SMARInsights. This study will inform priorities in developing specific EDI initiatives, enhance the visitor expectation by creating authentic marketing campaigns, and identify business and cultural gaps within the county. Six destination partners also took advantage of a co-op to gain access to more specific research about their individual destinations, and to better inform their marketing efforts in this area. Each destination partner had the option to add five unique questions to each questionnaire and/or 10 follow-up video interviews from study participants.



EXPERIENCE SLO CAL 2050

As Visit SLO CAL concentrated on addressing immediate concerns and needs affecting the county's Travel & Tourism industry during the COVID-19 pandemic, the momentum of the Experience SLO CAL 2050 recommendations, previously approved by the Visit SLO CAL Board of Directors, slowed in FY 2021. As California and the nation advances toward a post-pandemic mindset and travel steadily increases, VSC has doubled down on their commitment to advancing the Experience SLO CAL 2050 recommendations. In December, VSC hired a project manager to facilitate this scope of work and resume progress on the recommendations that have been prioritized and funded by the board.

EVENTS & FESTIVALS STRATEGY

In spring 2021, Visit SLO CAL released an RFP to interested agencies skilled in strategic planning for events and festivals, and received several proposals. Staff met with destination partners and local stakeholders to build understanding of, and partnership on, the objectives of the strategy and countywide events calendar.

CUSTOMER SERVICE TRAINING INITIATIVE

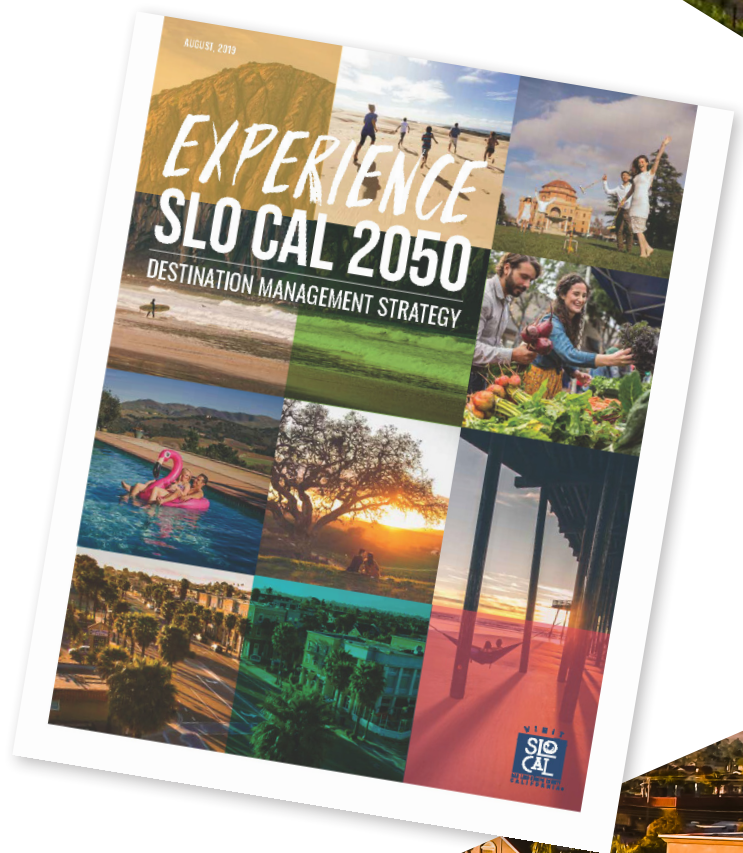
Visit SLO CAL moved forward with the Customer Service Training initiative by releasing an RFP to interested agencies specializing in program development. Four agency proposals were received and are under review for consideration.

INTERNATIONAL VISITATION

In anticipation of international travel reopening in FY 2022, Visit SLO CAL signed a renewal contract with Black Diamond for trade and public relations representation in the UK and Ireland beginning in July 2021, ensuring that SLO CAL remains top of mind in these markets.

PASO ROBLES & SLO COAST WINE

Visit SLO CAL partners closely with the Paso Robles Wine Country Alliance (PRWCA) and SLO Coast Wine Collective through their representation on VSC's Marketing Committee. Additionally, VSC partnered with PRWCA to gain access to critical SLO CAL winery data that segments the SLO Coast and Paso Robles wineries, as well as data from its top competitors, Napa and Sonoma. This data will be integrated into VSC's monthly Community Business Intelligence Reports in FY 2022.





COUNTYWIDE TRAIL SYSTEM

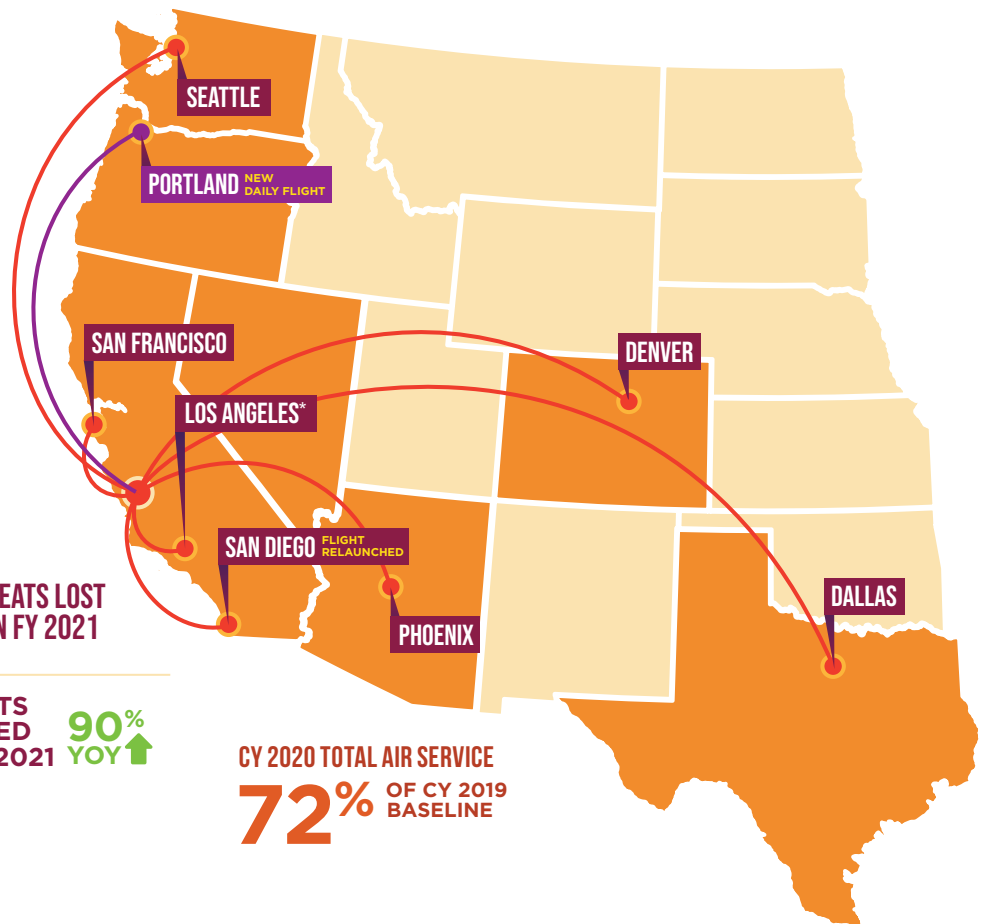
As part of VSC's advocacy efforts for a countywide connected trail system, they advocated for the extension and connection of the Bob Jones Trail from Avila Beach to San Luis Obispo, which was approved in March after receiving an \$18 million California Transportation Commission grant to fund the project. As part of the Experience SLO CAL 2050 recommendation for a countywide trails system, the Bob Jones Trail is a vital part of the transportation connectivity through our county and a visitor draw in our destination.

SPACE LAUNCH EVENTS

In the fall of 2020, VSC created a new landing page on SLOCAL.com to inform visitors about planned space launches from Vandenberg Space Force Base. This page is updated regularly as new launches are scheduled.

AIR SERVICE DEVELOPMENT

As the county and state begin to reopen, Visit SLO CAL has been working closely with the San Luis Obispo County Regional Airport on a FY 2022 air service recovery strategy to reactivate fly markets, leveraging SLO CAL's competitive advantage as a leisure-heavy market. In June, SLO CAL celebrated the launch of daily service from Portland and the relaunch of daily service from San Diego through Alaska Airlines. While SLO CAL lost 225,000 seats over the last two fiscal years, it is projected to gain 197,000 seats in the first six months of FY 2022.



29k SEATS LOST
IN FY 2020

196k SEATS LOST
IN FY 2021

197k

NEW SEATS
PROJECTED
JUL-DEC 2021

90%
YOY↑

CY 2020 TOTAL AIR SERVICE
72% OF CY 2019
BASELINE

*Temporarily suspended; scheduled to return in FY 2022

Source: Volaire

MOVING FORWARD

For FY 2022, Visit SLO CAL has defined four overarching objectives aligned with each of the four Strategic Direction 2023 imperatives, along with measurable key results for each objective. The efforts of each department for the coming year will ladder down from these objectives and key results.

IMPERATIVE 1

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

VSC is actively recruiting for several former and new positions in order to build the capacity necessary to execute the organization's most ambitious scope of work to date. In building the team, VSC is working to ensure that candidates have a professional experience and that team members are engaged with the organization's mission and values, beginning with a great recruitment and onboarding experience.

IMPERATIVE 2

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

Working with Mering, VSC will activate the House of Brands strategy, a three-phase approach to achieve adoption by all local destinations. VSC will also apply findings from the Future Visitor Profile Study and the EDI Study, set to be completed in August, ensuring long-term success in attracting new and diverse visitors.

IMPERATIVE 3

Implement recovery and resiliency planning initiatives

As the country moves toward a post-pandemic mindset, VSC will focus on advancing recommendations like the Events and Festivals strategy, Customer Service Training initiative and SLO CAL Crafted, and identifying other pathways that are integral to building and maintaining a resilient destination. VSC has partnered with Xplorit to launch a fully immersive virtual site inspection platform by winter 2021 that will help drive the recovery of meeting and conference business. VSC will also continue to position itself as a unified voice for the countywide Travel & Tourism industry.

IMPERATIVE 4

Increase engagement with investors, partners, stakeholders and communities

VSC will directly engage partners in opportunities to participate in programs that provide additional exposure to new audiences through advertising and owned channels. VSC will also evaluate resident sentiment for tourism in SLO CAL and will partner with stakeholders and local agencies to collaborate on and advocate for issues surrounding resident quality of life.



For more details on VSC's FY 2022 scope of work, be sure to download the FY 2022 Business & Marketing Plan, available here: <http://bit.ly/vsc-plan-22>.

FY 2022 BUDGET

ESTIMATED COST OF PROVIDING
ACTIVITIES IN THE NEXT FISCAL YEAR

\$9,073,050

ESTIMATED CONTRIBUTION FROM
NON-ASSESSMENT SOURCES

\$229,028

ESTIMATED FY 2021 SURPLUS
CARRIED FORWARD TO FY 2022

\$1,664,863



APPENDIX

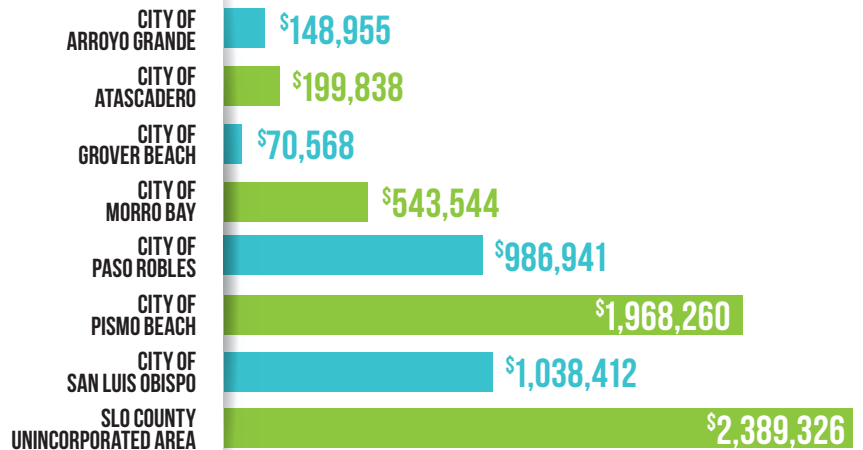
METHOD & BASIS OF LEVYING ASSESSMENT

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

PROPOSED BOUNDARY, ZONE OR CLASSIFICATION CHANGES

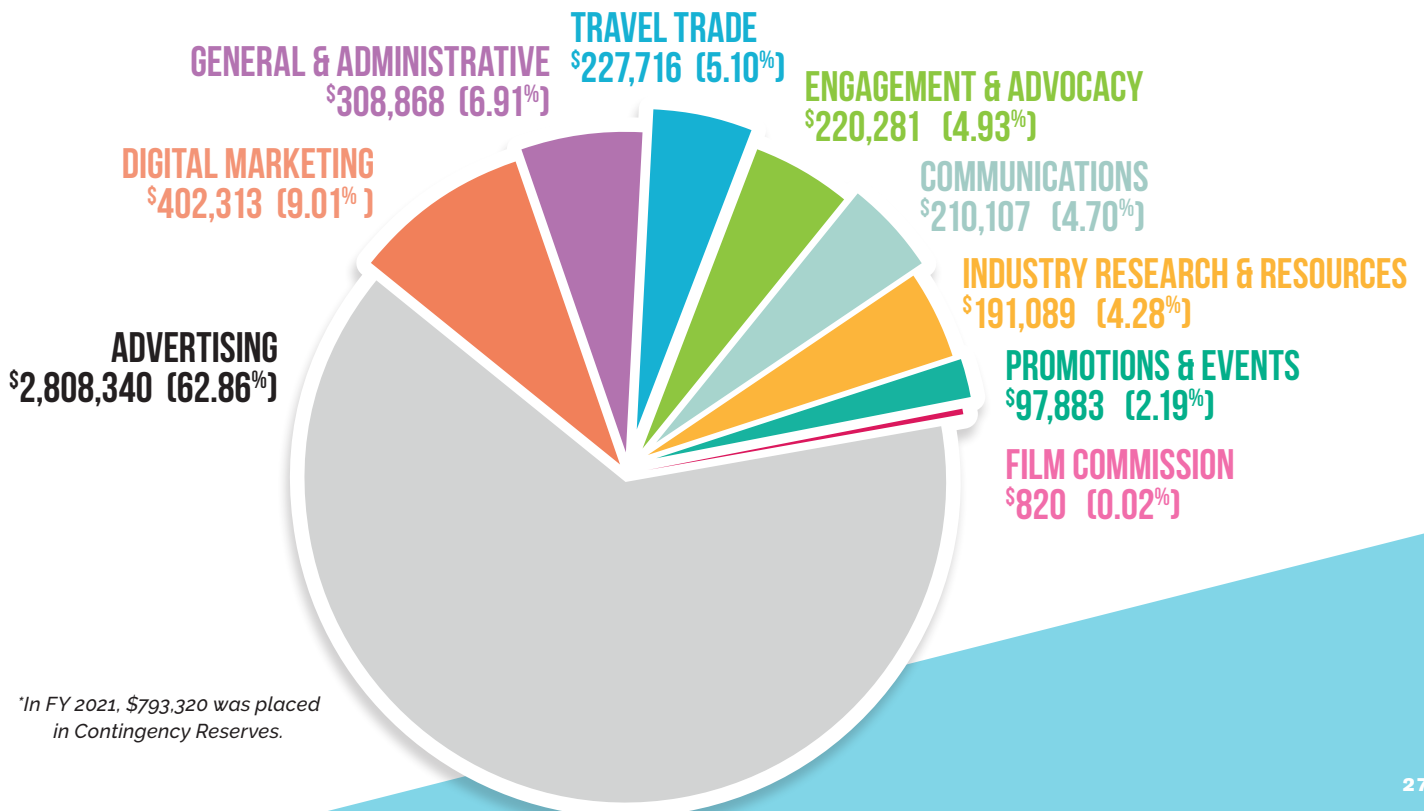
There are no proposed boundary, zone or classification changes for the coming year.

ASSESSED FUNDS FROM FY 2021*



*For FY 2021, TMD collections have been recorded in the actual year they were collected by lodging businesses. Visit SLO CAL has posted a prior period adjustment that records May/June 2020 TMD revenue in the actual fiscal year (ending 6/30/20). The amount of revenue being moved from FY 2021 to FY 2020 to reflect this change will be \$111,509.

FY 2021 DETAILED EXPENDITURES*





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