

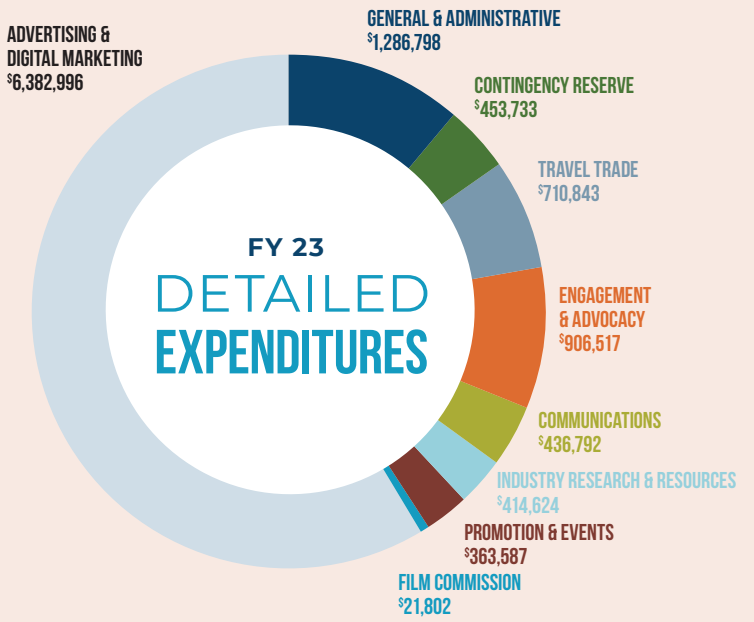
Strategic Direction 2023 Imperatives

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

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

Advance resiliency planning initiatives

Increase engagement with investors, partners, stakeholders and communities



Experience SLO CAL 2050

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

Air Service Development

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

Events & Festivals Strategy

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

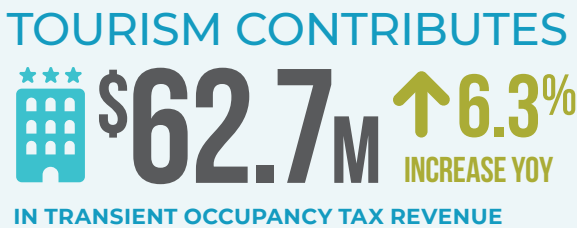
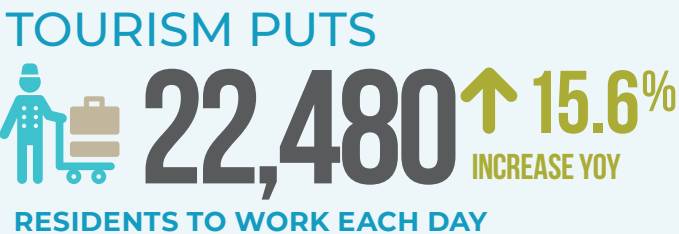
SLO CAL Welcome Customer Service Training

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

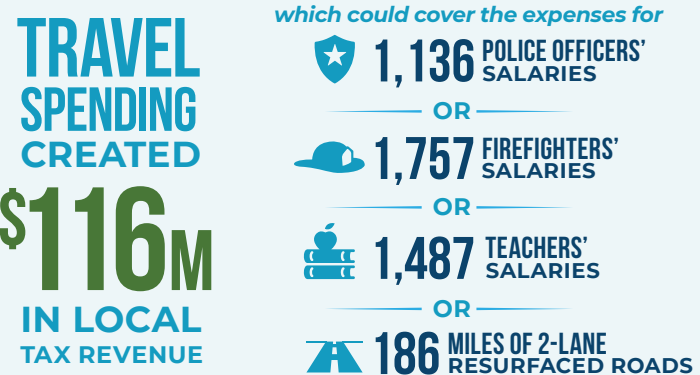
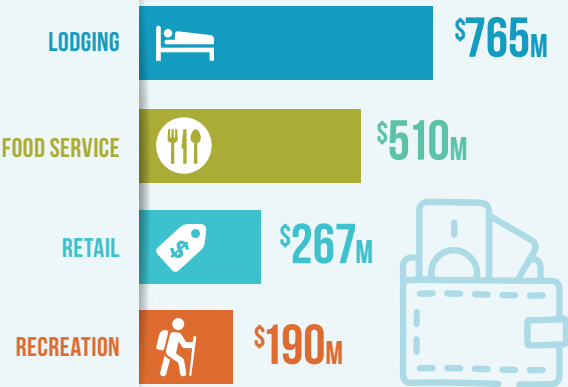
Thematic Routes

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

Why Tourism Matters

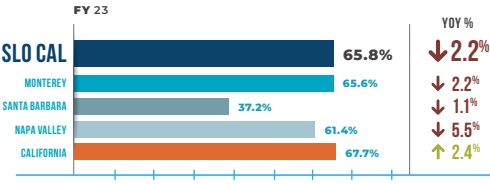


DIRECT SPENDING BY SECTOR

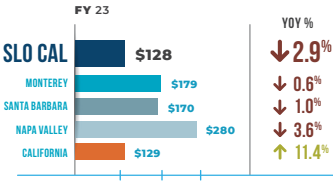


January – December 2022 Sources: Visit SLO CAL, "The Economic Impact of Travel in California" from Dean Runyan Associates, Bureau of Economic Analysis, United States Census Bureau, U.S. Bureau of Labor Statistics, Tourism Economics

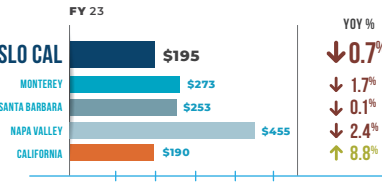
HOTEL OCCUPANCY OCC



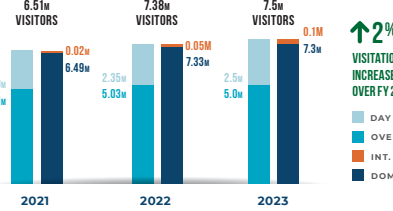
REVENUE PER AVAILABLE ROOM REVPAR



AVERAGE DAILY RATE ADR



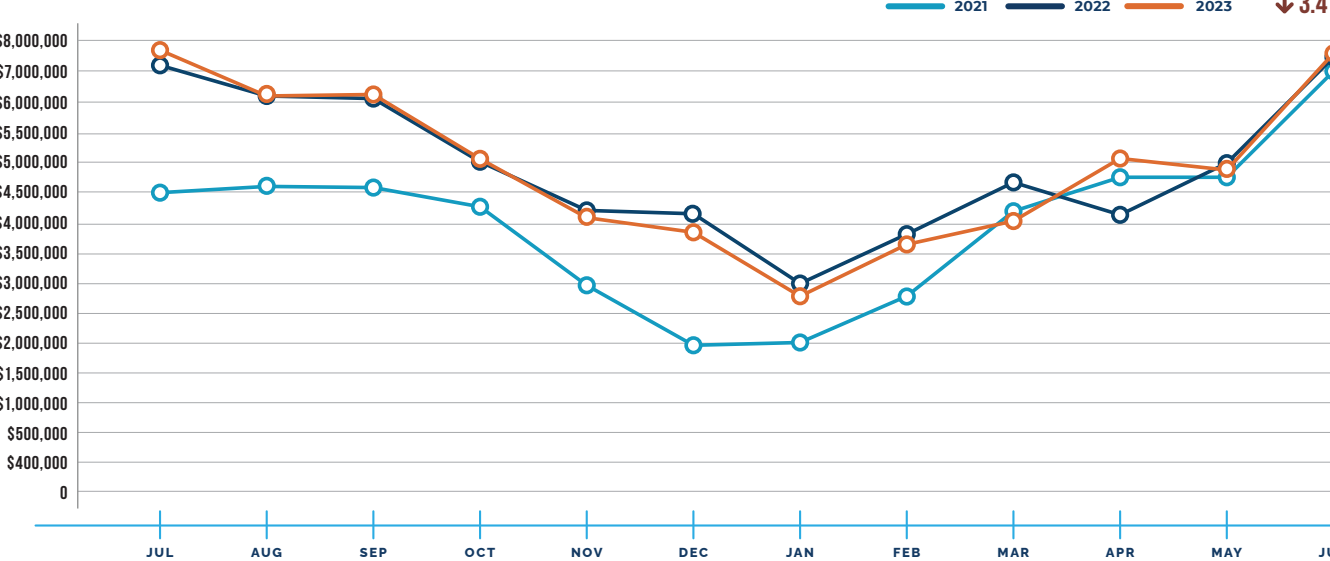
VISITOR VOLUME



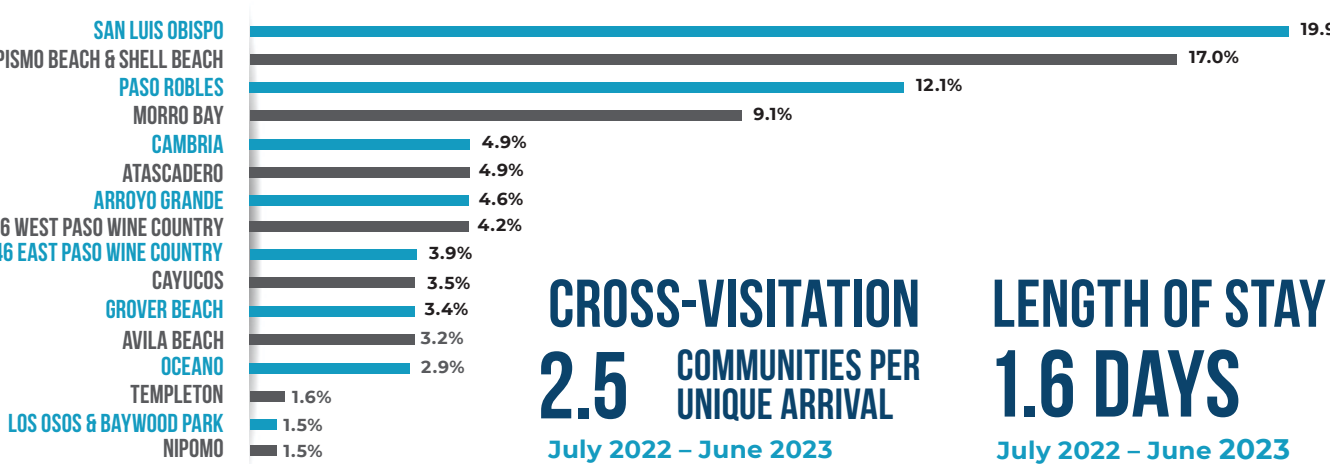
SLO CAL SUPPLY*



TRANSIENT OCCUPANCY TAX TOT



VISITOR ARRIVALS



CROSS-VISITATION

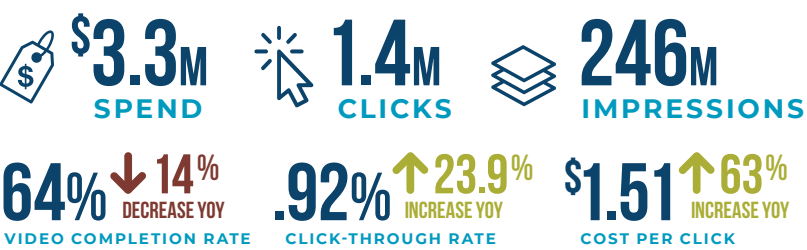


LENGTH OF STAY

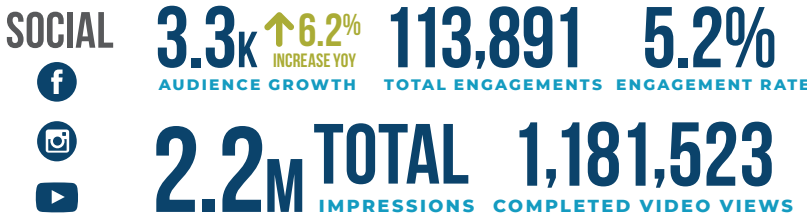
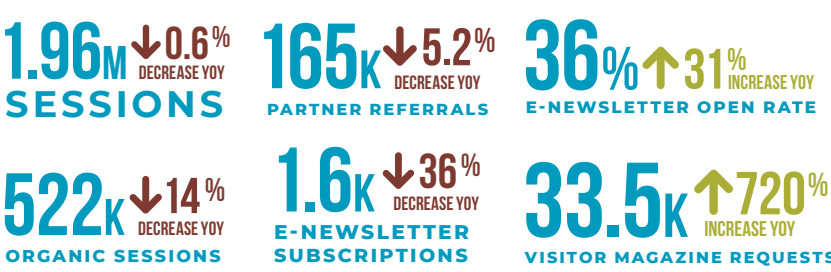


Source: Arrivalist, Tourism Economics
*Visit SLO CAL's data provider (Arrivalist) had a change in methodology due to changes in privacy legislation in the spring of 2023. As a result, some YOY numbers are inaccurate comparisons. VSC has tried to omit any errant numbers to avoid misrepresentation.

PAID MEDIA SNAPSHOT



SLOCAL.COM SNAPSHOT



PARTNER ENGAGEMENT



PAID MEDIA BY MARKET



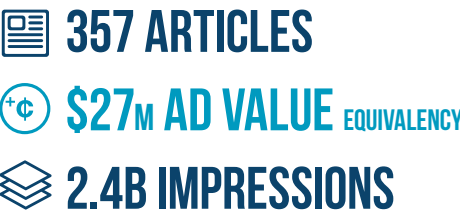
BREAKDOWN BY CHANNEL



SALES

218 APPOINTMENTS
3 TRADE SHOWS
217 LEADS
294 BUYERS TRAINED

EARNED MEDIA



 **91** PRODUCTIONS

 **194** FILMING DAYS

 **49** LEADS

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



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