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As we put the final stamp of completion on our FY 2018/19 work, before moving into the last year of the Tourism Marketing District (TMD) contract, we’d like to take a moment and reflect on all that has been accomplished. Over the past year we advanced key initiatives, launched new programs and grew SLO CAL’s reach and awareness as a destination.

Through the collective efforts of our industry, including all of you, we attracted 7.5 million visitors to SLO CAL in 2018, a growth of 10% over the first four years of the TMD. Visitor spending increased to $1.81 billion putting 20,680 tourism professionals to work each day. Our industry remains the #2 driver of SLO CAL’s economy, creating access to more customers, supply lines and investment, and importing dollars from regional, national and global guests, leading to continued growth.

Tourism in SLO CAL isn’t simply about economics. Through continued investment in air service development and the finalization of the Destination Management Strategy, our board remains future focused, proactively planning for the long-term viability of our community and working to protect and improve the quality of life for our residents. Visit SLO CAL’s efforts to develop strategies for sustainable and responsible growth in tourism for years to come will require additional commitment moving forward.

This next year will be one of refinement, as we maximize efficiencies and continue to optimize our work. At the direction of our board and lodging investors, we’ll work to ensure the future of the organization and industry through the renewal of the TMD, with an extended term of ten years and a 1.5% assessment. Collectively, we will continue to advance the strategic destination marketing and management for our communities. Empowered, we’ll promote SLO CAL proactively in prosperous times and reactively, if necessary, during threats of economic downturn or crisis, allowing SLO CAL to thrive competitively, regardless of conditions.

Congratulations on the past year of accomplishments. Together we have shown SLO CAL to the world, and together we can ensure SLO CAL’s success for years to come!

DEAR VISIT SLO CAL INVESTORS & STAKEHOLDERS,

Chuck Davison
President & CEO
Visit SLO CAL
VISION
A vibrant and prosperous San Luis Obispo County, fueled by a collaborative and flourishing tourism industry

MISSION
Inspire travel and foster our unique experiences to create life-long ambassadors and economic growth for San Luis Obispo County

VALUES
FUTURE FOCUSED
Delivering today with an eye on tomorrow

COLLABORATION
Our partnerships inform and support economic success

DRIVE
We bring enthusiasm to our initiatives and focus on results

STEWARDSHIP
We are mindful of our resources and the SLO CAL brand

BRAND INTENTION
STRATEGIC
CONNECTOR
CREATIVE
INSPIRING
ESSENTIAL
Increased Employee Engagement & Satisfaction
Administrative Cost to Economic Impact Ratio

Inbound Partnership Opportunities
Earned Partnership Value
Balanced Partnership Inventory

Increased Visitor Volume
Draft of Destination Management Strategy
Increased Total Air Service
Increased International Visitor Volume

Growth of Awareness in Target Markets, Segments and Personas

Community Engagement with Countywide Tourism
Growth in Total Visit SLO CAL Event Participation
Increased Stakeholder Satisfaction
Deliver on Marketing Plan Objectives
Growth in Local Media Coverage

STRATEGIC DIRECTION 2020
BOARD, COMMITTEES & TEAM

BOARD OF DIRECTORS

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

JOHN ARNOLD  
Vice Chair | Holiday Inn Express & Suites | Paso Robles  
Appointed Paso Robles Seat (—June 2021)

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

AARON GRAVES  
Treasurer | The Rigdon House | Unincorporated Area  
Elected Designated At-Large Seat (—June 2022)

JOY JAMISON  
Past President | Pismo Coast Village | Pismo Beach  
Elected Designated RV Park Seat (—June 2022)

ALMA AYON  
Sundance Bed & Breakfast | Paso Robles  
Elected Designated Bed & Breakfast Seat (—June 2022)

JEDIDIAH BICKEL  
SeaCrest OceanFront Hotel | Pismo Beach  
Appointed Pismo Beach Seat (—June 2021)

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

JIM HAMILTON  
County of San Luis Obispo  
Appointed County At-Large Seat (—June 2020)

SARAH MAGGELET  
Sarah’s Suite | Unincorporated Area  
Appointed Unincorporated Area Seat (—June 2022)

SAM MILLER  
Holiday Inn Express | Grover Beach  
Appointed Grover Beach Seat (—June 2022)

NIPOOL PATEL  
Lamplighter Inn & Suites | San Luis Obispo  
Appointed San Luis Obispo Seat (—June 2020)

HEMANT PATEL  
Comfort Inn Downtown | Morro Bay  
Appointed Morro Bay Seat (—June 2020)

AMAR SOHI  
Holiday Inn Express Hotel & Suites | Atascadero  
Appointed Atascadero Seat (—June 2020)

Open Seat | Arroyo Grande  
Appointed Arroyo Grande Seat (—June 2022)

MARKETING COMMITTEE

ASHLEE AKERS  
Partner & VP of Client Services | Verdin

JIM ALLEN  
Director of Marketing & Communications | Hearst Castle

AUDREY ARELLANO  
Brand Manager | Cambria Inns

TERRIE BANISH  
Deputy City Manager - Marketing/Promotions/Events | City of Atascadero

JOCELYN BRENNA  
President & CEO | South County Chambers of Commerce

MOLLY CANO  
Tourism Manager | City of San Luis Obispo

CHERYL CUMING  
Chief Administrative Officer | Unincorporated CBID

JANINE DION  
Marketing & Social Media Manager | Boutique Hotel Collection

LINDSEY HARTIG  
Marketing Manager | Martin Resorts

GORDON JACKSON  
Executive Director | Pismo Beach CVB

LORI KELLER  
President/Principal | Blu Hotel Management

JENNIFER LITTLE  
Tourism Manager | City of Morro Bay

JOEL PETERSON  
Executive Director | Paso Robles Wine Country Alliance

JOHN SORGENFREE  
President & Owner | TJA Advertising

ANNE STEINHAUER  
Executive Director | SLO Coast Wine Collective

DANNA STROUD  
Executive Director | Travel Paso

JILL TWEEDIE  
Founder & President | Breakaway Tours & Event Planning
TEAM

CHUCK DAVISON
President & CEO

BROOKE BURNHAM
Vice President of Marketing

MICHAEL WAMBOLT
Director of Travel Trade

DEREK KIRK
Director of Community Engagement & Advocacy

BRENDAN PRINGLE
Operations Manager

JORDAN CARSON
Marketing & Brand Manager

MADISON QUIRING
Communications Manager

HALEY CAHILL
Marketing Coordinator

HALEY RAMOS
Office Coordinator

VANESSA ROBBINS
Digital Marketing Coordinator

ADVISORY COMMITTEE

WADE HORTON
County Administrative Officer | County of San Luis Obispo

LYNN COMPTON
Supervisor | County of San Luis Obispo

JIM BERGMAN
City Manager | City of Arroyo Grande

LAN GEORGE
Councilmember | City of Arroyo Grande

RACHELLE RICKARD
City Manager | City of Atascadero

HEATHER NEWSOM
Councilmember | City of Atascadero

MATTHEW BRONSON
City Manager | City of Grover Beach

MARIAM SHAH
Councilmember | Grover Beach

SCOTT COLLINS
City Manager | City of Morro Bay

RED DAVIS
Councilmember | City of Morro Bay

THOMAS FRUTCHEY
City Manager | City of Paso Robles

STEVE MARTIN
Mayor | City of Paso Robles

JIM LEWIS
City Manager | City of San Luis Obispo

ERIK HOWELL
Mayor Pro Tem | City of Pismo Beach

DEREK JOHNSON
City Manager | City of San Luis Obispo

HEIDI HARMON
Mayor | City of San Luis Obispo
WHY TOURISM MATTERS

DIRECT SPENDING

$1.81B in local tax revenue
$5.0M a day
$3.5K an hour
$208K an hour
$58 a second

BY ACCOMMODATION TYPE

VACATION HOMES
PRIVATE HOMES
CAMPGROUNDS
DAY TRAVEL
HOTELS/ MOTELS

BY SECTOR

ARTS, RECREATION & ENTERTAINMENT
RETAIL
LODGING
FOOD SERVICE

JOBS

210 OTHER TRAVEL
1,530 RETAIL
5,600 ARTS, ENTERTAINMENT & RECREATION
12,730 ACCOMMODATIONS & FOOD SERVICE

20,680 TOTAL JOBS


TRAVEL SPENDING

$80.1M in local tax revenue

WHICH COULD COVER EXPENSES FOR:

- 800 police officers’ salaries
- 1,084 firefighters’ salaries
- 1,736 teachers’ salaries
- 128 miles of 2-lane resurfaced roads
- 111 parks

VISITOR VOLUME

10.2% growth 2014-2018

Source: Tourism Economics

GROWTH

2014 6.8M
2015 7.0M
2016 7.0M
2017 7.2M
2018 7.5M

SLO CAL JOBS DEPEND ON TRAVEL & TOURISM

1 out of 7


Source: Tourism Economics

TOURISM COMPRISSES 9.7% OF COUNTYWIDE GDP


WITHOUT TOURISM

EACH SLO CAL HOUSEHOLD WOULD PAY AN ADDITIONAL $1,582 IN TAXES

WOULD HAVE TO SPEND AN ADDITIONAL $17,231 TO CREATE THE SAME ECONOMIC IMPACT FOR THE COMMUNITY

Sources: Dean Runyan Associates, U.S. Census Bureau
**TOP MARKETS BY VISITOR SPENDING**

**TOP ORIGINATING COUNTRIES BY SPEND AMOUNT ($M)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Spend Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>$35M</td>
</tr>
<tr>
<td>DE</td>
<td>$25M</td>
</tr>
<tr>
<td>UK</td>
<td>$20M</td>
</tr>
<tr>
<td>FR</td>
<td>$15M</td>
</tr>
<tr>
<td>ES</td>
<td>$10M</td>
</tr>
<tr>
<td>CH</td>
<td>$5M</td>
</tr>
<tr>
<td>DK</td>
<td>$2.5M</td>
</tr>
<tr>
<td>IT</td>
<td>$2.5M</td>
</tr>
</tbody>
</table>

**KEY**
- **CA** = CANADA
- **DE** = GERMANY
- **UK** = UNITED KINGDOM
- **CH** = SWITZERLAND
- **DK** = DENMARK
- **IT** = ITALY

**TOP ORIGINATING MSAs BY SPEND AMOUNT ($M)**

<table>
<thead>
<tr>
<th>MSa</th>
<th>Spend Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>LA</td>
<td>$150M</td>
</tr>
<tr>
<td>SF</td>
<td>$120M</td>
</tr>
<tr>
<td>SB</td>
<td>$90M</td>
</tr>
<tr>
<td>FR</td>
<td>$60M</td>
</tr>
<tr>
<td>BF</td>
<td>$30M</td>
</tr>
<tr>
<td>SD</td>
<td>$15M</td>
</tr>
<tr>
<td>SAC</td>
<td>$15M</td>
</tr>
<tr>
<td>VIS</td>
<td>$10M</td>
</tr>
<tr>
<td>SAL</td>
<td>$5M</td>
</tr>
</tbody>
</table>

**KEY**
- **LA** = LA/Orange County/Riverside
- **SB** = Santa Barbara/Santa Maria
- **BF** = Bakersfield
- **SD** = San Diego
- **SAC** = Sacramento/Yolo
- **VIS** = Visalia/Tulare/Porterville
- **SAL** = Salinas

**Source:** VVT/VISA

---

**HOTEL OCCUPANCY (OCC)**

**AVERAGE DAILY RATE (ADR)**

**REVENUE PER AVAILABLE ROOM (REVPAR)**

**TRANSIENT OCCUPANCY TAX (TOT)**

**Sources:** STR, Visit SLO CAL

*These figures reflect the impact in visitation due to the Highway 1 closure.
Travel trade utilizes international representation, sales missions, familiarization tours (FAMs) and trade shows to expand Visit SLO CAL’s reach. For the first time, VSC participated in Visit California (VCA) sales missions to Germany, Japan and South Korea. IPW was VSC’s largest international trade show to date, sponsoring an interactive, outdoor food and wine activation that drew thousands of buyers and media over five days. VSC also hosted a record number of FAM attendees this year, showcasing SLO CAL™ as a multi-night destination.

**2018**

**SEPT**
- VSC Tour & Travel Sales Mission

**OCT**
- California RV Show (RVIA)
- Vacation Rental Management Association (VRMA)
- VCA UK Super FAM

**NOV**
- World Travel Market & German Sales Days
- Holiday Architects FAM
- VCA Central China FAM

**DEC**
- CalSAE Seasonal Spectacular

**FAMS**
- 12

**TRAVEL PROFESSIONALS**
- 82

**TOTAL BUYING POWER**
- $100M
489 LEADS

INTERNATIONAL SALES MISSION COUNTRIES
- SCOTLAND
- JAPAN
- CHINA
- ENGLAND
- SOUTH KOREA
- GERMANY

DOMESTIC SALES MISSIONS
- SACRAMENTO
- LOS ANGELES

JAN
- VCA China FAM

FEB
- GoWest Summit

MAR
- Virgin Holidays FAM
- UK Black Diamond Product FAM
- UK Sales Mission

APR
- VCA Asia Sales Mission
- VCA Flight Centre FAM

JUNE
- IPW
- Post-IPW FAM
- VCA Meetings & Conferences Sales Mission
- UK Black Diamond Agent FAM
- Destinology FAM
- Holiday Architects FAM
- Kenwood Travel FAM

INDUSTRY TERMS

FAM: A hosted tour of SLO CAL for travel trade or media representatives to experience and learn about the destination firsthand.

Agency Takeover: A one-on-one training for a travel agency or agent to learn about the destination and its products.

Sales Mission: A series of sales meetings in a target market with travel agencies, tour operators and/or meeting planners to pitch and educate them on the destination and its offerings.

Lead: A connection or opportunity provided to local partners to book business, promote their business or host representatives with travel trade or media.

For more information on the IPW activation, see page 19.
Visit SLO CAL leverages the county’s unique destination assets and dynamic array of experiences to garner the attention of writers, editors and influencers from around the world. In partnership with Visit California, local destination marketing organizations and local business partners, VSC engages members of the media through in-market meetings, press events, proactive pitching and FAM tours. These efforts and their contracts with TURNER PR domestically, and Black Diamond in the UK and Ireland, have helped VSC grow earned media results significantly this year.

**Domestic**
- 98 Articles
- $3.1M Ad Value Equivalency
- 324M Impressions

**International**
- 261 Articles
- $3.5M Ad Value Equivalency
- 220M Impressions

**Total**
- 359 Articles
- $6.6M Ad Value Equivalency
- 544M Impressions

Metrics include the VCA Dream Drive activation results. For more details, see page 19.
In FY 2018/19, Visit SLO CAL expanded storytelling on their owned media channels, finding new ways to introduce travelers to the SLO CAL® way of life and authentic local voices. Utilizing print, social media, email marketing and SLOCAL.com, VSC’s rich, inspiring content converts users into visitors and visitors into ambassadors.
Unique, unexpected and local are at the top of consumers’ lists of things they want to taste, see and experience in a destination. In FY 2018/19, VSC launched the SLO CAL Crafted™ brand and content to promote the wide variety of food, goods, arts and products produced in the county.

In FY 2018/19, Visit SLO CAL activated the SLO CAL Storytellers—five local brand ambassadors from around the county with a combined reach of over 135K followers. The Storytellers go on SLO CAL excursions and share their experiences through content on their social media and on VSC’s owned media channels.

**SLO CAL Crafted™**

**Official Visitors Magazine**

45,000 Circulation

**Social Media Engagement**

**Social Media Return on Investment (ROI)**

<table>
<thead>
<tr>
<th>Platform</th>
<th>Incremental Trips Generated</th>
<th>Avg Length of Stay</th>
<th>Total Visitor Spending</th>
<th>ROI Per Follower</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>1,739</td>
<td>3.2 Days</td>
<td>$1,991,543</td>
<td>$59.88</td>
</tr>
<tr>
<td>Instagram</td>
<td>1,289</td>
<td>2.9 Days</td>
<td>$1,376,107</td>
<td>$65.84</td>
</tr>
</tbody>
</table>

Source: Destination Analytics
In FY 2018/19, Visit SLO CAL partnered with a new media agency, Miles Partnership, to guide and execute the paid advertising strategy. In the first year of the relationship, Miles Partnership worked alongside VSC and their brand agency, BCF, to execute the scope of work. The data-driven, emotionally engaging Life’s Too Beautiful to Rush® campaign was delivered to three target personas across seven media markets, including a spring campaign to support the new daily flight service from Dallas-Fort Worth.

**Campaign by the Numbers**

- **Spend**: $1.4M, UP YOY 27%
- **Clicks**: 469k, UP YOY 39%
- **Impressions**: 131M, UP YOY 32%
- **Bounce Rate**: 43.95%
- **Pages/Session**: 1.39
- **Avg Session Duration**: 2:37
ACTIVE ADVENTURER
ACTIVE, MID-HIGH AFFLUENT, EDUCATED, DEEPLY PASSIONATE EXPERIENCE-SEEKERS

TOTAL TARGET POPULATION 6.4M

PAID MEDIA PROFILE
• All Genders
• Ages 25–45
• HHI $70K+

MOM TO THE MAX
SCHEDULED, CONNECTED, AFFLUENT, TRANSPARENT (THE GOOD AND THE UGLY)

TOTAL TARGET POPULATION 1.9M

PAID MEDIA PROFILE
• Identifies as Female
• Ages 28–55
• HHI $100K+

CULTURED CLASS
EDUCATED, RISK TAKERS, GRACIOUS, CONFIDENT, PROFESSIONALS

TOTAL TARGET POPULATION 6.4M

PAID MEDIA PROFILE
• All Genders
• Ages 28–65+
• HHI $100K+

TRACKED ARRIVALS*

OWNED MEDIA USA ARRIVALS

CALIFORNIA 89.7%
ARIZONA 3.0%
WASHINGTON 2.4%
COLORADO 2.1%
TEXAS 1.6%
NEVADA 1.2%

2,966 TOTAL ARRIVALS

PAID MEDIA USA ARRIVALS

CALIFORNIA 80.6%
ARIZONA 5.2%
COLORADO 3.6%
NEVADA 3.6%
WASHINGTON 3.5%
TEXAS 3.5%

5,098 TOTAL ARRIVALS

*Arrivals are based on a sample trackable through Arrivalist and are not inclusive of all arrivals to SLO CAL.
Source: Arrivalist
BRAND ACTIVATIONS & CO-OPS

Following the Strategic Direction 2020 imperative to “build and expand strategic partnerships,” Visit SLO CAL engaged in a variety of events and activations, including SAVOR - A San Luis Obispo County Experience, the AMGEN Tour of California, IPW, the Visit California Dream Drive and advertising co-ops with their local DMO partners. With these efforts, VSC was able to leverage the power of collaboration and showcase SLO CAL® to consumers, travel trade professionals and media from around the world, growing brand awareness and strengthening partnerships.

$50k SPONSORSHIP
2 HOURS OF INTERNATIONAL TV COVERAGE
2 CO-OP PARTNERS

For the second year in a row, Visit SLO CAL offered destination partners the opportunity to tap into their paid media program via Facebook paid ads. The goal in this campaign was to utilize VSC’s targeting on this platform and funnel people to the participating DMO’s page on SLOCAL.com, increasing traffic and engagement.

facebook CO-OP
2 CO-OP PARTNERS $26k INVESTMENT
27k LINK CLICKS 31k VIDEO VIEWS 2.16m IMPRESSIONS

DESTINATION PARTNERS
Arroyo Grande California
Atascadero Simply Genuine
DREAM DRIVE

Visit SLO CAL, Visit California and destination partners celebrated the reopening of Highway 1 in August 2018, at the Dream Drive event where 90+ international media and representatives drove the newly-opened highway from Monterey to Morro Bay. Following this large celebration, more than half of the media and digital influencers were hosted across SLO CAL during a two-day FAM tour.

ATTENDEES

6,200
6,200 $80k
$80k SPONSORSHIP

CO-OP PARTNERS

3
3 $50K VSC CONTRIBUTION

$50K VSC CONTRIBUTION

IPW SPONSORSHIP CO-OP

At IPW 2019 in Anaheim, Visit California activated a one-of-a-kind experience, the California Plaza, in the outdoor corridor at the entrance to the Anaheim Convention Center. In this showcase of the California road trip experience, Visit SLO CAL sponsored a large section, offering immersive video chairs, a Life’s Too Beautiful to Rush® selfie wall and a bar pouring wine and beer from local partners. Paso Robles, Pismo Beach and San Luis Obispo each sponsored a specific event within the SLO CAL activation, featuring destination-specific branding, food and beverages.

HOSTED MEDIA

49
49 $5.54M
$5.54M AD VALUE EQUIVALENCY

ARTICLES

298
298

IMPRESSIONS

371.6M
371.6M

TOTAL PARTNERSHIPS

63
63

SLO CAL COMMUNITIES

16
16

DOMESTIC & INTERNATIONAL TV AD

For the third year in a row, SLO CAL was featured in one of Visit California’s international television spots. The Oceano Dunes State Vehicular Recreation Area was the star of the show in the Kidifornia spot called “Parents Like It, Too.”

1.03B IMPRESSIONS

HOSTED MEDIA

49
49

ATTENDEES

6,200
6,200

AD VALUE EQUIVALENCY

$5.54M
$5.54M

ARTICLES

298
298

IMPRESSIONS

371.6M
371.6M

TOTAL PARTNERSHIPS

63
63

SLO CAL COMMUNITIES

16
16

ATTENDEES

6,200
6,200

SPONSORSHIP ACTIVATION

$80K
$80K

CO-OP PARTNERS

3
3

$50K VSC CONTRIBUTION

$50K VSC CONTRIBUTION

SLO CAL PARTNER CONTRIBUTION

$30K
$30K

IMPRESSIONS

298
298

ARTICLES

49
49

HOSTED MEDIA

49
49

ATTENDEES

6,200
6,200

AD VALUE EQUIVALENCY

$5.54M
$5.54M

ARTICLES

298
298

IMPRESSIONS

371.6M
371.6M

TOTAL PARTNERSHIPS

63
63

SLO CAL COMMUNITIES

16
16

DOMESTIC & INTERNATIONAL TV AD

For the third year in a row, SLO CAL was featured in one of Visit California’s international television spots. The Oceano Dunes State Vehicular Recreation Area was the star of the show in the Kidifornia spot called “Parents Like It, Too.”

1.03B IMPRESSIONS
The film industry drives business to SLO CAL® with productions investing dollars locally and their products often serving as “commercials” for the destination, showcasing the landscapes, lifestyles and experiences of SLO CAL. Film SLO CAL, a division of Visit SLO CAL, promotes, facilitates and tracks filming throughout the county, working to increase the number of productions and their economic impact.

**Notable Projects**

- MOUNTAIN LIFE, HGTV
- HEARST CASTLE, CNN
- 7 LITTLE JOHNSTONS, TLC
- THE GREAT AMERICAN BAKING SHOW, ABC
- COMMERCIALS: GUCCI, LOUIS VUITTON, HONDA, CHEVROLET, JEEP, GMC
- MUSIC VIDEO: KESHA

**Events**

- CALIFORNIA ON LOCATION AWARDS (COLA)
  - 500 ATTENDEES
  - In 2018, Dena Bellman, California State Parks (Oceano Dunes District), won the COLA award for State Public Employee.
- SLOIFF FILM FAM
  - 3 FILM SCOUTS
- AMERICAN FILM MARKET
  - 7,000 ATTENDEES

**Industry & Local Partners**

- 104 PRODUCTIONS
- 289 FILMING DAYS
- 1,319 ROOM NIGHTS
- 105 LEADS
- $2.9M ESTIMATED SPEND IN SLO CAL
Visit SLO CAL’s Strategic Direction 2020 identifies the need to demonstrate value to stakeholders, partners and communities as one of the key imperatives. The community engagement and advocacy efforts of VSC include industry education programs, investor outreach, the destination management strategy planning process and strategic partnership development. It is crucial that VSC provides value and opportunity to business and industry partners in all of their initiatives.

**COMMUNITY & PARTNER ENGAGEMENT**

2,438 PARTNER ENGAGEMENTS

**INDUSTRY EDUCATIONAL SYMPOSIUM**

184 ATTENDEES

**DESTINATION SUMMIT**

112 ATTENDEES

**SPEAKERS FROM:**

Visit California
miles

**INDUSTRY & LOCAL PARTNERS**

Visit SLO CAL proudly partners with a number of excellent organizations, from local strategic partners to international industry associations. VSC takes pride in promoting awareness of their programs, and is working in tandem to accomplish various missions and reduce the duplication of efforts.

San Luis Obispo Regional Airport
SLOCOG
CAL Poly San Luis Obispo
HOURGLASS PROJECT
EVC
Paso Robles Wine Country
CENTRAL COAST COALITION OF CHAMBERS
SLO COAST WINE COLLECTIVE
CALIFORNIA TRAVEL ASSOCIATION
DESTINATIONS INTERNATIONAL
U.S. TRAVEL ASSOCIATION
In January 2018, the Visit SLO CAL Board of Directors selected Resonance Consultancy to facilitate the development of a Destination Management Strategy. This countywide undertaking was a collaborative process with the goal of outlining the evolution, marketing and management of SLO CAL® as a travel destination 20-30 years into the future. VSC engaged investors, tourism stakeholders, public officials, businesses, nonprofits and residents countywide, to create a strategy that promotes a vibrant and prosperous San Luis Obispo County.

Each of the recommendations in the Destination Management Strategy will help SLO CAL reach its goal of realizing travel and tourism’s full economic potential while preserving the quality of life and unique character of the destination. In FY 2019/20, the VSC board and staff will work with partners to prioritize the recommendations and collaborate to begin implementation.
OUTREACH PROCESS

13 MONTHS

<table>
<thead>
<tr>
<th>RESIDENT SURVEY</th>
<th>VISITOR SURVEY</th>
<th>STAKEHOLDER MEETINGS</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,053 RESPONSES</td>
<td>2,080 RESPONSES</td>
<td>175 STAKEHOLDERS</td>
</tr>
</tbody>
</table>

8 STEERING COMMITTEE MEETINGS
4 VISIONING WORKSHOPS
7 COMMUNITY LEADER BRIEFINGS

AIR SERVICE DEVELOPMENT

270K ADDITIONAL SEATS IN 3 YEARS

65% GROWTH

AIR SERVICE FROM LAS VEGAS (4X A WEEK) BEGINNING OCTOBER 2019

NEW AIR SERVICE FROM DALLAS LAUNCHED APRIL 2019
SALES SUPPORT
Help communities manage the unprecedented 20% increase in countywide lodging inventory over the next four years through the growth of travel trade initiatives

AIR SERVICE DEVELOPMENT
Grow economic impact of tourism through continued development of additional flights and new air service markets

INTERNATIONAL MARKETS
Investment in top inbound international markets and key new growth markets

DESTINATION MANAGEMENT STRATEGY RECOMMENDATIONS
Implement Visit SLO CAL owned tourism-related recommendations coming out of the DMS

ADVERTISING & MARKETING
Increased campaign investment in key feeder markets (Los Angeles, San Francisco, Phoenix, Seattle, Denver, Dallas-Fort Worth and Las Vegas) to drive demand during need times and increase length of stay through highly-targeted brand marketing and co-ops, in order to offset a 20% increase in countywide lodging inventory over the next four years. STR is forecasting a 3.5% decrease in occupancy and a 1.7% decrease in RevPAR forecasted in 2020.

MOVING FORWARD
TOURISM MARKETING DISTRICT RENEWAL
The countywide Tourism Marketing District (TMD) will expire on June 30, 2020 and the lodging community, in partnership with Visit SLO CAL, is seeking the renewal of the District. When the TMD was first approved for installation in July of 2015 for a five-year term, few were thinking of today. Now, after four years of Visit SLO CAL’s groundbreaking work and results, it is time to embark on the district renewal process. In November 2018, the Visit SLO CAL Board of Directors unanimously approved the first step to ensure the future of this essential organization. The draft Management District Plan, approved by the Visit SLO CAL Board of Directors on March 28, 2019, outlines a ten-year renewal, and increase in the assessment from 1.0% to 1.5%.

Visit SLO CAL explored what the future competitive landscape of tourism will look like and how to best compete for visitors, discussing those findings with lodging investors and government officials. Through those conversations, the industry identified five key areas of priority requiring long-term, strategic investment to keep SLO CAL competitive. Investment in these priorities will be required to overcome an initial 11.8% increase in lodging inventory currently under construction in SLO CAL, with a projected 3.5% decrease in occupancy and 1.7% decrease in RevPAR forecasted in 2020.

Source: STR
Implement Visit SLO CAL owned tourism-related recommendations coming out of the Destination Management Strategy (DMS) recommendations, and then conduct a workshop with Visit SLO CAL and select stakeholders. Resonance will compile these modalities into a Destination Management Strategy Work Plan to guide implementation.

**5-YEAR TERM**  
1.0% ASSESSMENT

**10-YEAR TERM**  
1.5% ASSESSMENT

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**PETITION DRIVE**  
Aug-Oct

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**CITY COUNCIL HEARINGS**  
Sept-Oct

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**BOARD OF SUPERVISORS HEARINGS**  
Nov-Jan

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**FINAL BOARD OF SUPERVISORS HEARING**  
January

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**DESTINATION MANAGEMENT STRATEGY**

Resonance Consultancy will draft an implementation plan, responsibilities, timing and resources necessary and available to implement the DMS recommendations, and then conduct a workshop with Visit SLO CAL and select stakeholders. Resonance will compile these modalities into a Destination Management Strategy Work Plan to guide implementation.

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**NEXT STEPS**

**JULY**  
VSC BOARD TO ACCEPT THE DMS REPORT

**AUG-OCT**  
WORK PLAN DEVELOPMENT

**FALL**  
BOARD TO ACCEPT WORK PLAN AND PRIORITIZE RECOMMENDATIONS

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**PRIORITIZATION**

In Fall 2019, the Visit SLO CAL Board will review the DMS Work Plan crafted by Resonance Consultancy and the recommended prioritization for implementation in fiscal year 2019/20. The board will then direct appropriate resources to the prioritized recommendations.
FY 2019/20 BUDGET

Estimated cost of providing activities in the next fiscal year: $4,487,534

Estimated amount of contribution from non-assessment sources: $134,288

Estimated FY 2018/19 surplus carried forward to FY 2019/20: $82,217

Reserves: $789,430

Cash carryover: $794,565

About 72% of the FY 2019/20 Budget will be spent on Marketing, Sales and Public Relations.

*Contingency funds reflect 5% of TMD revenue.

**Engagement & Advocacy is a new department created in FY2019/20, and includes the finalization of the Destination Management Strategy consulting project that was previously budgeted in Industry Research & Resources.
APPENDIX

METHOD & BASIS OF LEVYING ASSESSMENT
The annual assessment rate is 1% of gross short-term (stays 30 or fewer consecutive days) room rental revenue. With the passage of the Tourism Marketing District on June 10, 2015, implementation of the assessment began July 1, 2015, and continues for five years through June 30, 2020. 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 thirty days of receipt, the county and each city then forward the assessments collected to the 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 2018/19*

PREVIOUS YEAR TMD COLLECTED IN CURRENT YEAR
- CITY OF ARROYO GRANDE: $189,426
- CITY OF ATASCADERO: $95,062
- CITY OF GROVER BEACH: $136,628
- CITY OF MORRO BAY: $36,544
- CITY OF PASO ROBLES: $342,760
- CITY OF PISMO BEACH: $547,004
- CITY OF SAN LUIS OBISPO: $1,023,191
- SLO COUNTY UNINCORPORATED AREA: $783,852
- ADJUSTMENT FOR ACTUAL TMD COLLECTED: $193,397

*Collections remitted from July 1, 2018 to June 30, 2019, including adjustments made for current year remittances that varied from accrued amounts.

FY 2018/19 DETAILED EXPENDITURES

- TRAVEL TRADE: $452,101 (10.04%)
- DIGITAL MARKETING: $332,116 (7.37%)
- COMMUNICATIONS: $323,085 (7.17%)
- GENERAL & ADMINISTRATIVE: $272,603 (6.05%)
- CONTINGENCY RESERVE: $223,476 (4.97%)
- EVENTS: $135,934 (3.02%)
- PROMOTIONS: $43,736 (0.97%)
- FILM COMMISSION: $25,351 (0.56%)
- INDUSTRY RESEARCH & RESOURCES*: $709,025 (15.74%)
- ADVERTISING: $1,986,729 (44.11%)

*For FY 2018/19, Industry Research & Resources included the Destination Management Strategy consulting project.