



ANNUAL REPORT

FY 2018/19

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DEAR VISIT SLO CAL INVESTORS & STAKEHOLDERS,



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!

A handwritten signature in white ink that reads "Chuck Davison". The signature is fluid and cursive.

CHUCK DAVISON
President & CEO
Visit SLO CAL

STRATEGIC DIRECTION 2020

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



Visit SLO CAL (VSC) is a small, but mighty team of destination marketing and management professionals who work with, and on behalf of, the community, the local partners and investors to promote SLO CAL® (San Luis Obispo County, California) to travelers from around the world. As the sole countywide non-profit destination marketing and management organization (DMMO) for SLO CAL, Visit SLO CAL's goal is to work with partners to build the SLO CAL brand and experience through a data-driven, efficient and dynamic business and marketing program. Built on research, with a strategy of continuous improvement, this program 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.



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 2020)

JAY 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 2021)

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 2021)

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 2021)

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 BRENNAN

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 SORGENFREI

President & Owner | TJA Advertising

ANNE STEINHAEUER

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 Pismo Beach

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

TOURISM
COMPRISES 9.7%
OF COUNTYWIDE
GDP



Source: Tourism Economics

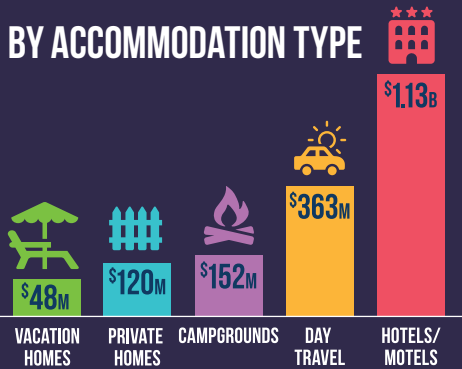
DIRECT SPENDING

\$1.81B **5.2%** **↑** **VOY**

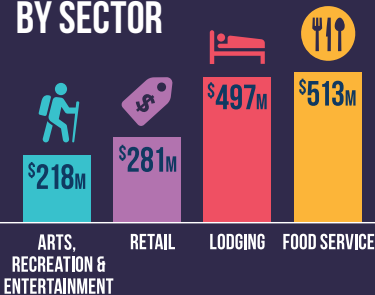


\$5.0M A DAY
\$3.5k A MINUTE
\$208k AN HOUR
\$58 A SECOND

BY ACCOMMODATION TYPE

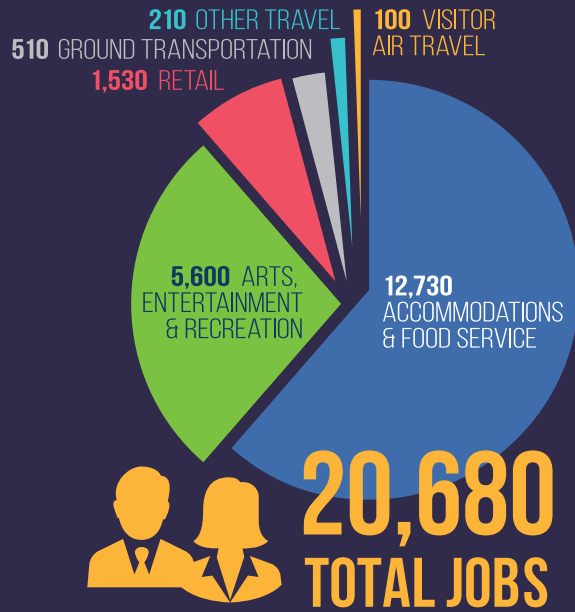


BY SECTOR



Source: Dean Runyan Associates

JOBS



1 OUT OF 7 SLO CAL JOBS DEPEND ON TRAVEL & TOURISM

Sources: Dean Runyan Associates, U.S. Bureau of Labor Statistics

WITHOUT
TOURISM
EACH SLO CAL
HOUSEHOLD
WOULD PAY AN
ADDITIONAL
\$1,582
IN TAXES

WOULD HAVE
TO SPEND AN
ADDITIONAL
\$17,231

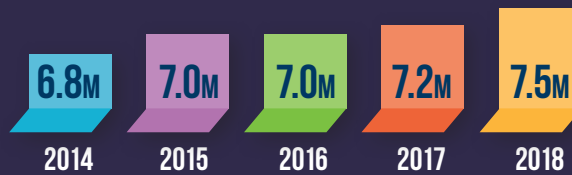
TO CREATE THE SAME
ECONOMIC IMPACT
FOR THE COMMUNITY

Source: Dean Runyan Associates, U.S. Census Bureau

VISITOR VOLUME

10.2% GROWTH
2014-2018

Source: Tourism Economics



TRAVEL SPENDING **CREATED \$80.1M** IN LOCAL TAX REVENUE

WHICH COULD COVER EXPENSES FOR:

800
POLICE OFFICERS' SALARIES

1,084
FIREFIGHTERS' SALARIES

1,736
TEACHERS' SALARIES

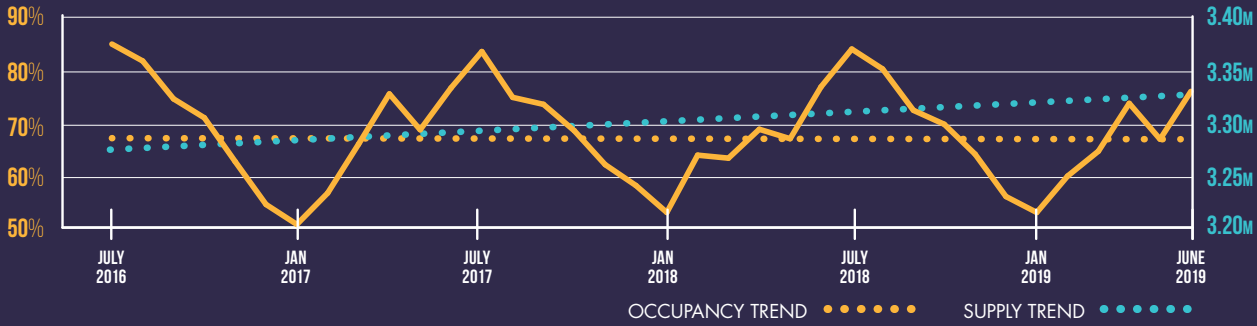
128MI
OF 2-LANE RESURFACED ROADS

111
PARKS

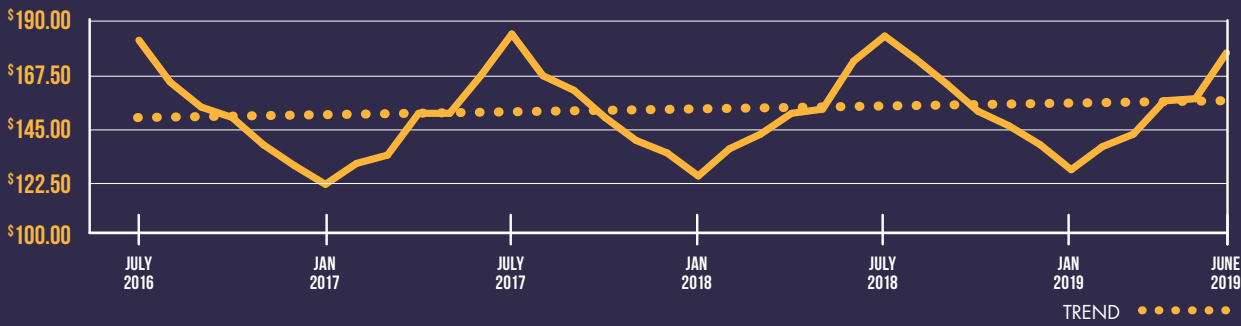
Sources: Dean Runyan Associates, U.S. Bureau of Labor Statistics, U.S. Census Bureau, San Luis Obispo County Office of Education and ARTBA

HOTEL OCCUPANCY (OCC)*

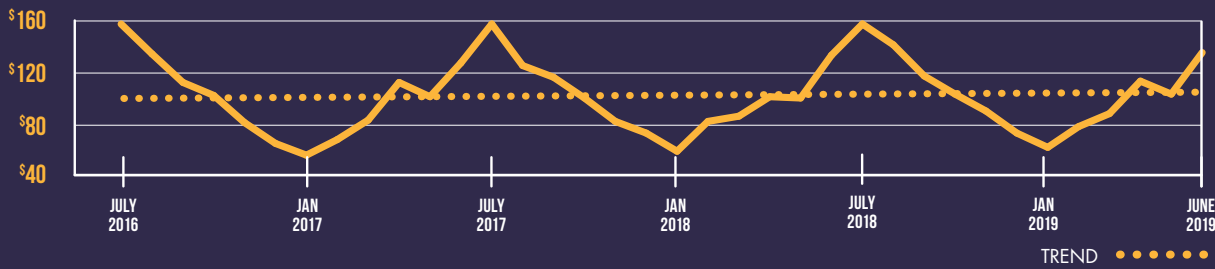
1% INCREASE FY 16/17 - FY 18/19
ROOM DEMAND



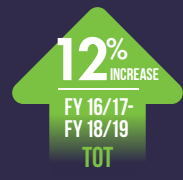
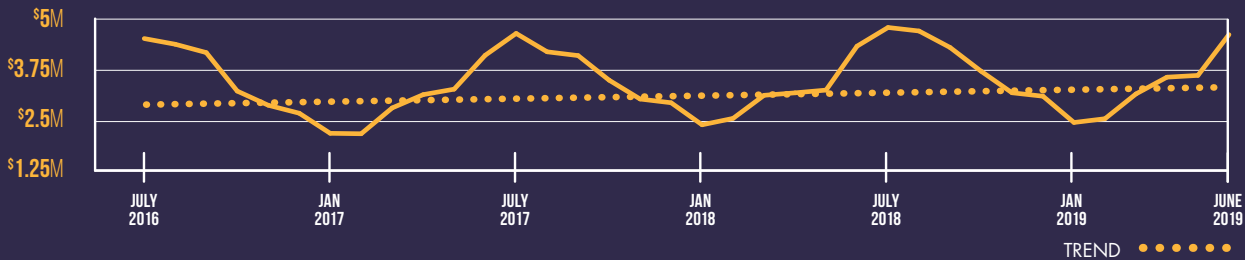
AVERAGE DAILY RATE (ADR)



REVENUE PER AVAILABLE ROOM (REVPAR)



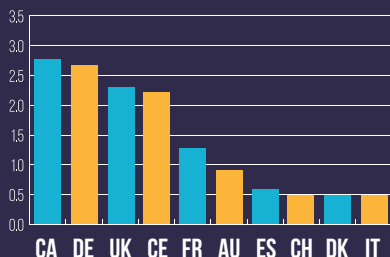
TRANSIENT OCCUPANCY TAX (TOT)



Sources: STR, Visit SLO CAL *These figures reflect the impact in visitation due to the Highway 1 closure.

TOP MARKETS BY VISITOR SPENDING

TOP ORIGINATING COUNTRIES BY SPEND AMOUNT (\$M)

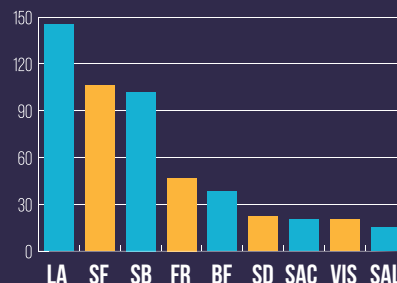


KEY

- CA = CANADA
- DE = GERMANY
- UK = UNITED KINGDOM
- CE = CHINA
- FR = FRANCE
- AU = AUSTRALIA
- ES = SPAIN
- CH = SWITZERLAND
- DK = DENMARK
- IT = ITALY

Source: VVT/VISA

TOP ORIGINATING MSAs BY SPEND AMOUNT (\$M)



KEY

- LA = LA/ORANGE COUNTY/RIVERSIDE
- SF = SAN FRANCISCO/OAKLAND/SAN JOSE
- SB = SANTA BARBARA/SANTA MARIA
- FR = FRESNO
- BF = BAKERSFIELD
- SD = SAN DIEGO
- SAC = SACRAMENTO/YOLO
- VIS = VISALIA/TULARE/PORTERVILLE
- SAL = SALINAS

MSA=Metropolitan Statistical Area

TRAVEL TRADE

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.




12 FAMs

82 TRAVEL PROFESSIONALS

\$100M TOTAL BUYING POWER

489 LEADS



INTERNATIONAL SALES MISSION COUNTRIES

SCOTLAND • JAPAN • CHINA
ENGLAND • SOUTH KOREA • GERMANY



DOMESTIC SALES MISSIONS

SACRAMENTO • LOS ANGELES

4 AGENCY TAKEOVERS

4 SALES MISSIONS

8 CITIES

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



For more information on the IPW activation, see page 19.

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.

EARNED MEDIA

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.



INTERNATIONAL COVERAGE



MEDIA
EVENTS & ENGAGEMENTS

DOMESTIC

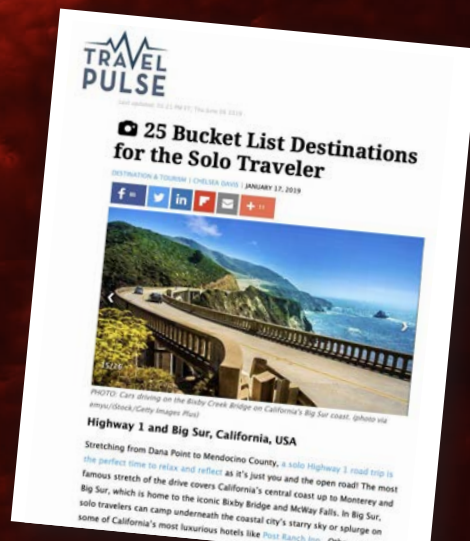
3 MEDIA EVENTS

118 MEDIA ENGAGEMENTS

INTERNATIONAL

3 MEDIA EVENTS

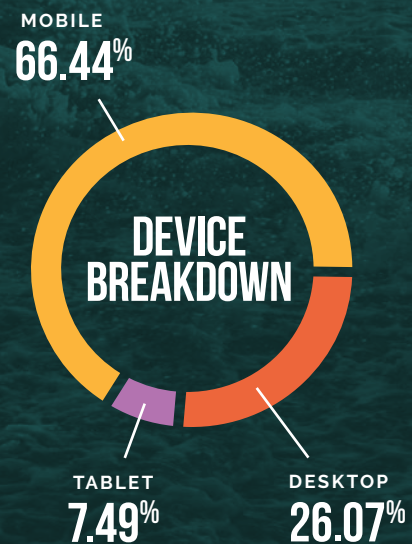
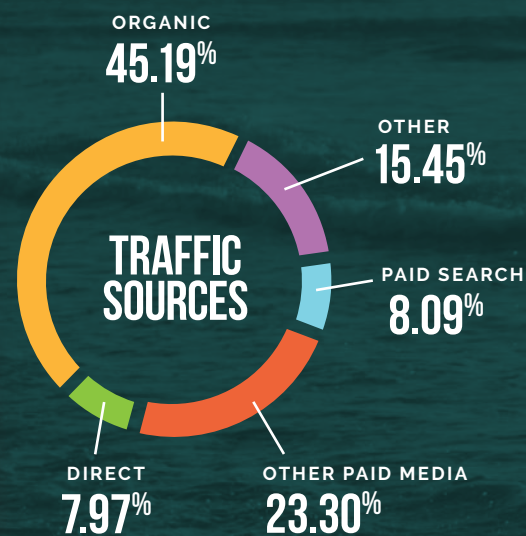
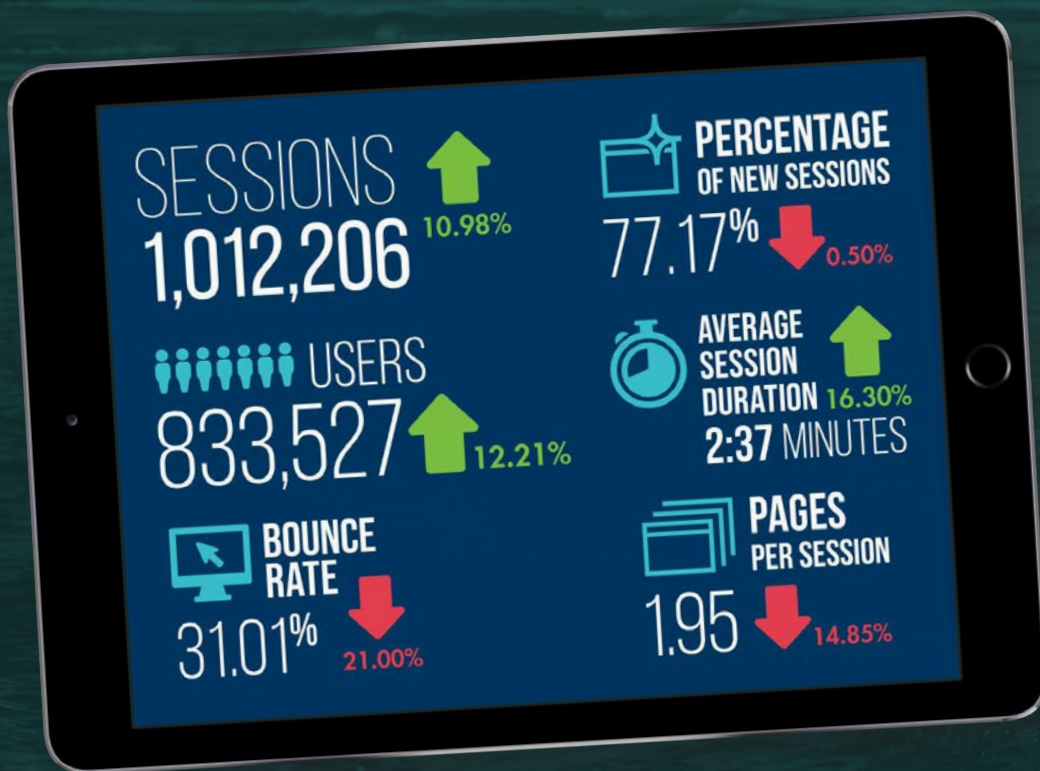
40 MEDIA ENGAGEMENTS



OWNED MEDIA

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.

FY 2018/19 SLOCAL.COM SNAPSHOT





SLO CAL Crafted™

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.



OFFICIAL VISITORS MAGAZINE

45,000 CIRCULATION

SOCIAL MEDIA ENGAGEMENT

SOCIAL MEDIA RETURN ON INVESTMENT (ROI)

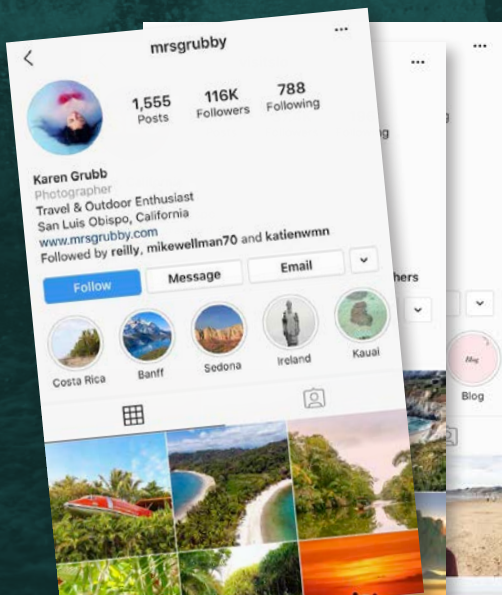
facebook

INCREMENTAL TRIPS GENERATED	1,739
AVG LENGTH OF STAY	3.2 DAYS
TOTAL VISITOR SPENDING	\$1,991,543
ROI PER FOLLOWER	\$59.88

Instagram

INCREMENTAL TRIPS GENERATED	1,289
AVG LENGTH OF STAY	2.9 DAYS
TOTAL VISITOR SPENDING	\$1,376,107
ROI PER FOLLOWER	\$65.84

Source: Destination Analytics

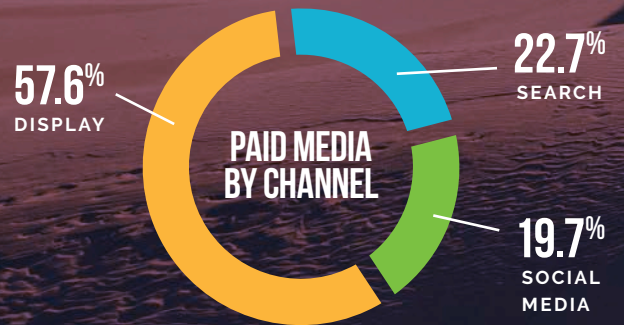
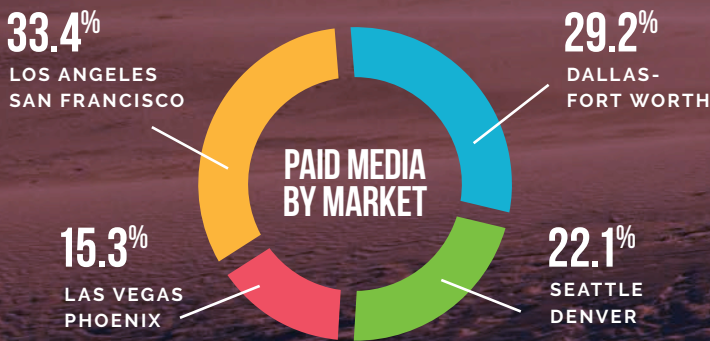


SLO CAL STORYTELLERS

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.

PAID MEDIA

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





ACTIVE ADVENTURER

ACTIVE, MID-HIGH AFFLUENT, EDUCATED, DEEPLY PASSIONATE EXPERIENCE-SEEKERS

PAID MEDIA PROFILE

- All Genders
- Ages 25-45
- HHI \$70K+

TOTAL TARGET POPULATION

6.4M



MOM TO THE MAX

SCHEDULED, CONNECTED, AFFLUENT, TRANSPARENT (THE GOOD AND THE UGLY)

PAID MEDIA PROFILE

- Identifies as Female
- Ages 28-55
- HHI \$100K+

TOTAL TARGET POPULATION

1.9M



CULTURED CLASS

EDUCATED, RISK TAKERS, GRACIOUS, CONFIDENT, PROFESSIONALS

PAID MEDIA PROFILE

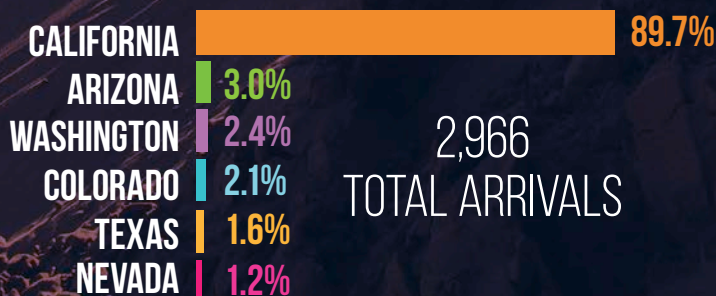
- All Genders
- Ages 28-65+
- HHI \$100K+

TOTAL TARGET POPULATION

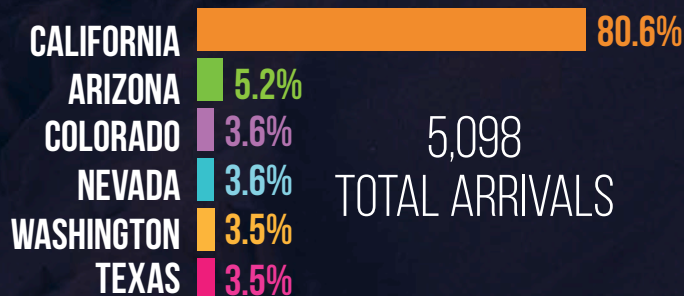
6.4M

TRACKED ARRIVALS*

OWNED MEDIA USA ARRIVALS



PAID MEDIA USA 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



MORRO BAY FINISH
PISMO BEACH START



A SAN LUIS OBISPO COUNTY EXPERIENCE®

SAN DIEGO

SEATTLE



2 CO-OP
PARTNERS

17 TOTAL
PARTNERSHIPS

13k
REACH

facebook CO-OP

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.

2 CO-OP
PARTNERS

\$26k INVESTMENT

LINK CLICKS

27k

VIDEO VIEWS

31k

IMPRESSIONS

2.16M

DESTINATION PARTNERS



visit California



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.



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.



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."



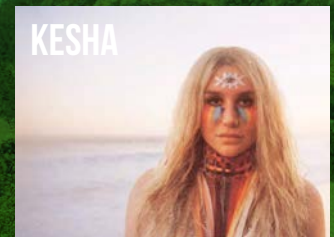


The film industry drives business to SLO CAL® with productions investing dollars locally and their products often serving as “commercials” for the destination, showcasing the landscapes, lifestyles and experiences of SLO CAL. Film SLO CAL, a division of Visit SLO CAL, promotes, facilitates and tracks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

104 PRODUCTIONS
 289 FILMING DAYS
 1,319 ROOM NIGHTS 
 105 LEADS
 \$2.9M ESTIMATED SPEND IN SLO CAL

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.



visit California INDIA FILM PRODUCER FORUM

29 ATTENDEES 

SLOIFF FILM FAM

3 FILM SCOUTS 



AMERICAN FILM MARKET

7,000 ATTENDEES 

COMMUNITY & PARTNER ENGAGEMENT

2,438 
PARTNER ENGAGEMENTS

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.

INDUSTRY EDUCATIONAL SYMPOSIUM

112 
ATTENDEES



SPEAKERS FROM:



DESTINATION SUMMIT

184 
ATTENDEES



SPEAKERS FROM:



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.



DESTINATION MANAGEMENT STRATEGY

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.



EXPERIENCE DEVELOPMENT

Expanding opportunities for SLO CAL residents and visitors to experience all the county has to offer

AUTHENTIC COMMUNITIES

BIKE TOURISM

CANNABIS TOURISM

DEVELOP & GROW COMMUNITIES

EVENTS & FESTIVALS STRATEGY

NIGHTLIFE, MUSIC & ENTERTAINMENT

SAVOR SLO CAL

SIGNATURE EVENT(S)

SLO CAL CRAFTED BRAND

SPACE LAUNCH EVENTS

THEMATIC ROUTES

INDUSTRY ADVANCEMENT & ADVOCACY

Uniting the travel and tourism industry and expanding the impact on the regional economy

CULINARY ARTS CAMPUS

CUSTOMER SERVICE

EXPERIENCE INCUBATOR

INTERNATIONAL VISITORS

PASO ROBLES & SLO COAST WINE

SUSTAINABLE TOURISM

TALENT ATTRACTION, DEVELOPMENT & CAREERS

TOURISM MANAGEMENT

VISIT SLO CAL & FUNDING

INFRASTRUCTURE & INVESTMENT

Public and private sector partners working together to expand opportunities in SLO CAL

AIR SERVICE & AIRPORT DEVELOPMENT

CHIEF INVESTMENT OFFICER

COUNTYWIDE TRAIL SYSTEM

GROUND TRANSPORTATION

MORRO BAY WATERFRONT

SAN LUIS OBISPO COUNTY CONFERENCE CENTER(S)

WORKFORCE HOUSING

WORKFORCE TRANSPORTATION

OUTREACH PROCESS

 13 MONTHS

RESIDENT SURVEY

5,053 
RESPONSES

VISITOR SURVEY

2,080 
RESPONSES

STAKEHOLDER MEETINGS

175 
STAKEHOLDERS

8 STEERING COMMITTEE MEETINGS

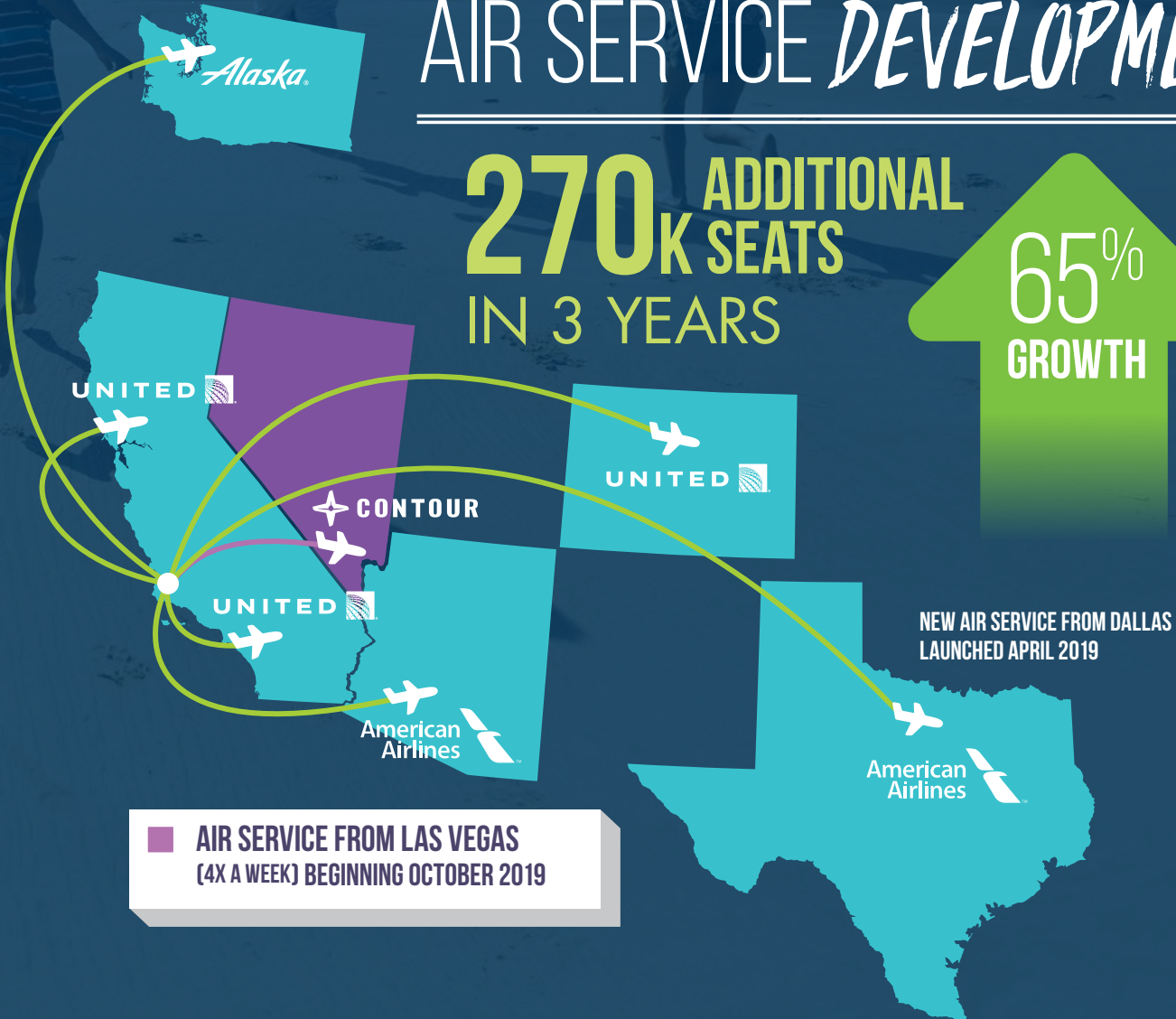
4 VISIONING WORKSHOPS

7 COMMUNITY LEADER BRIEFINGS

AIR SERVICE DEVELOPMENT

270k ADDITIONAL SEATS
IN 3 YEARS

65%
GROWTH



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

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 in 2020.



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



INTERNATIONAL MARKETS

Investment in top inbound international markets and key new growth markets



AIR SERVICE DEVELOPMENT

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



DESTINATION MANAGEMENT STRATEGY RECOMMENDATIONS

Implement Visit SLO CAL owned tourism-related recommendations coming out of the DMS



Cultivate Awareness



Establish New Markets



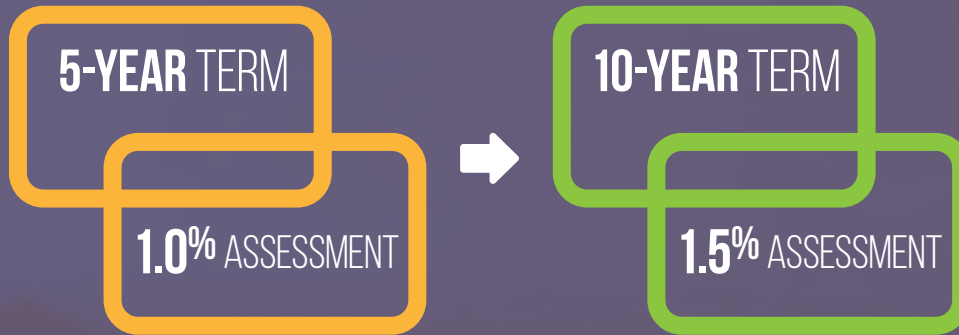
Foster International Visitation



Drive More Demand



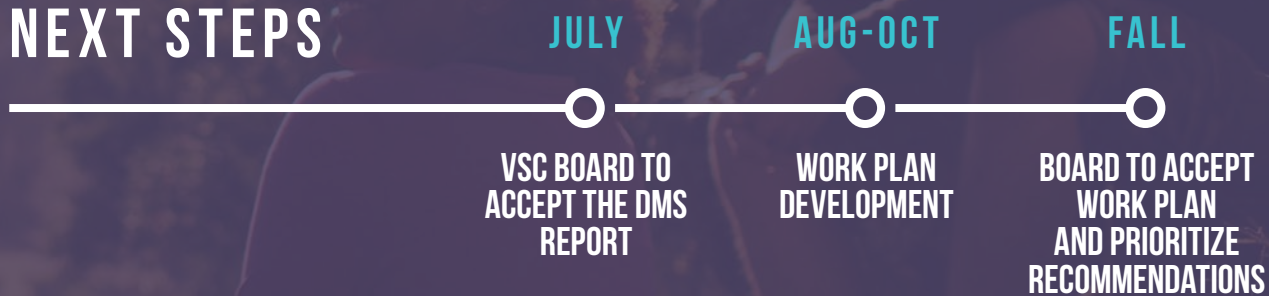
Advocate for Our Future



DESTINATION MANAGEMENT STRATEGY

Resonance Consultancy will draft an implementation plan, responsibilities, timing and resources necessary and available to implement 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.

NEXT STEPS



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

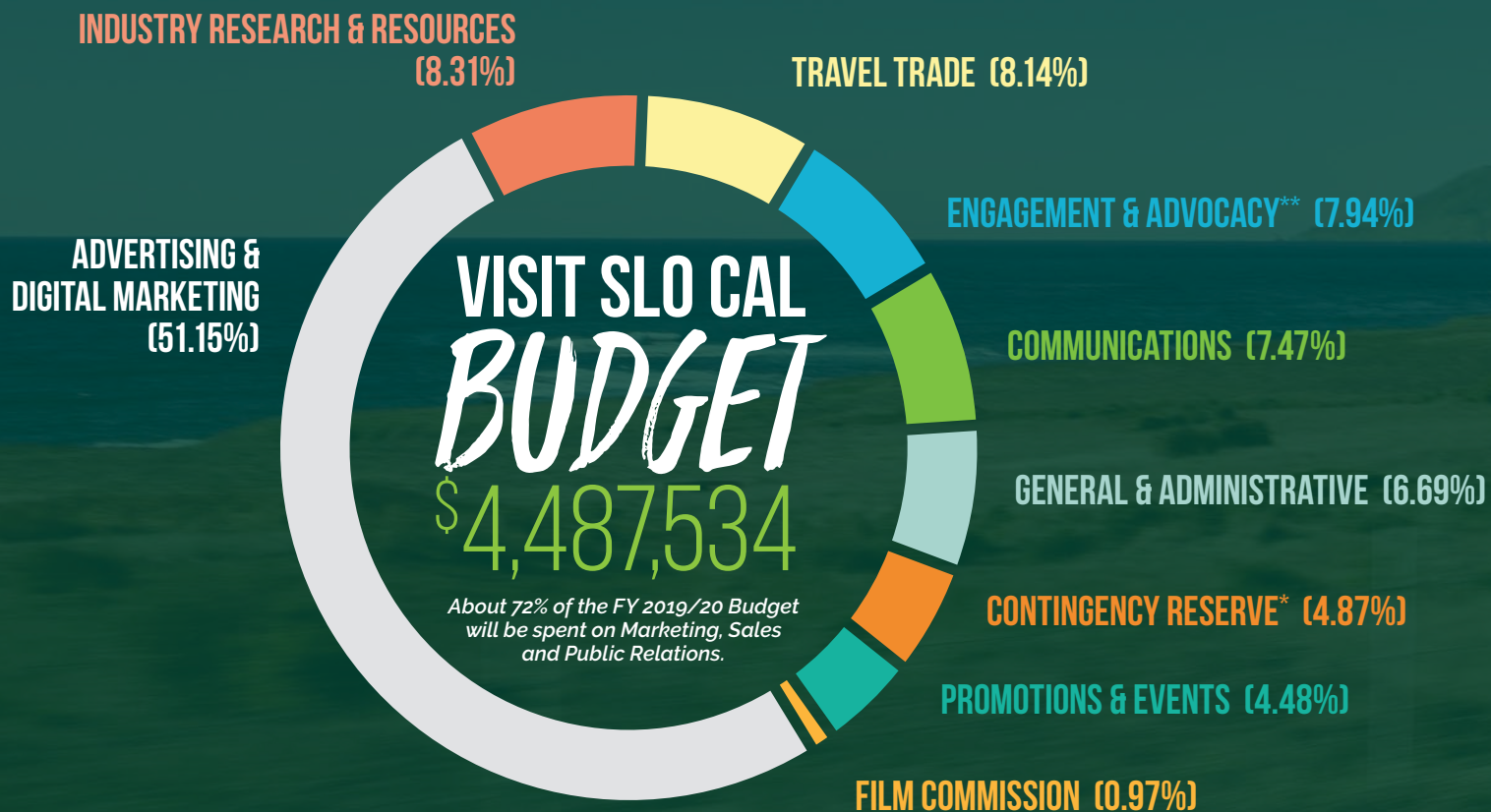
\$82,217

RESERVES

\$789,430

CASH CARRYOVER

\$794,565



*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

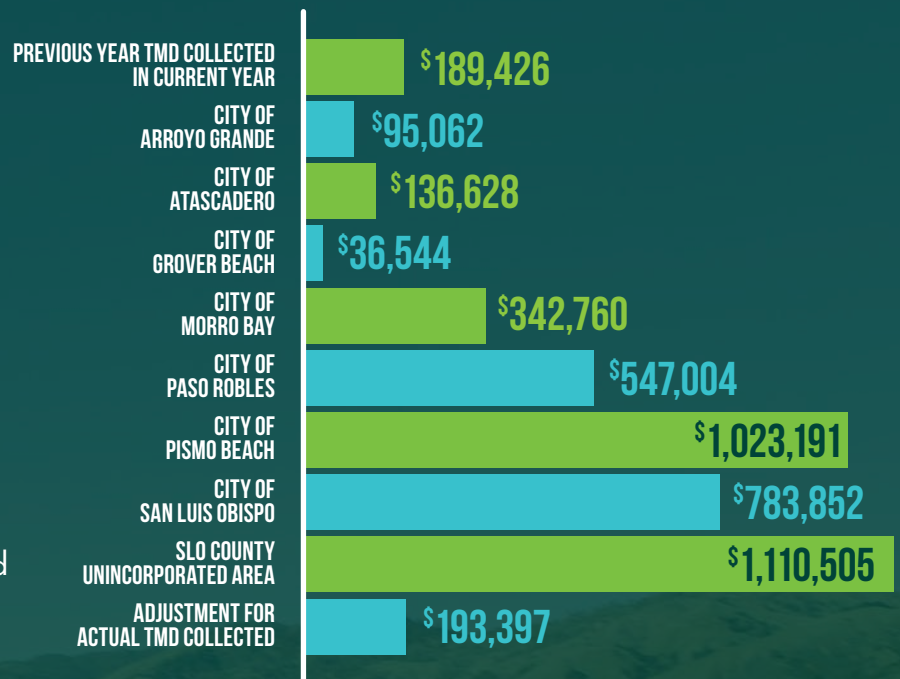
METHOD & BASIS OF LEVYING ASSESSMENT

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

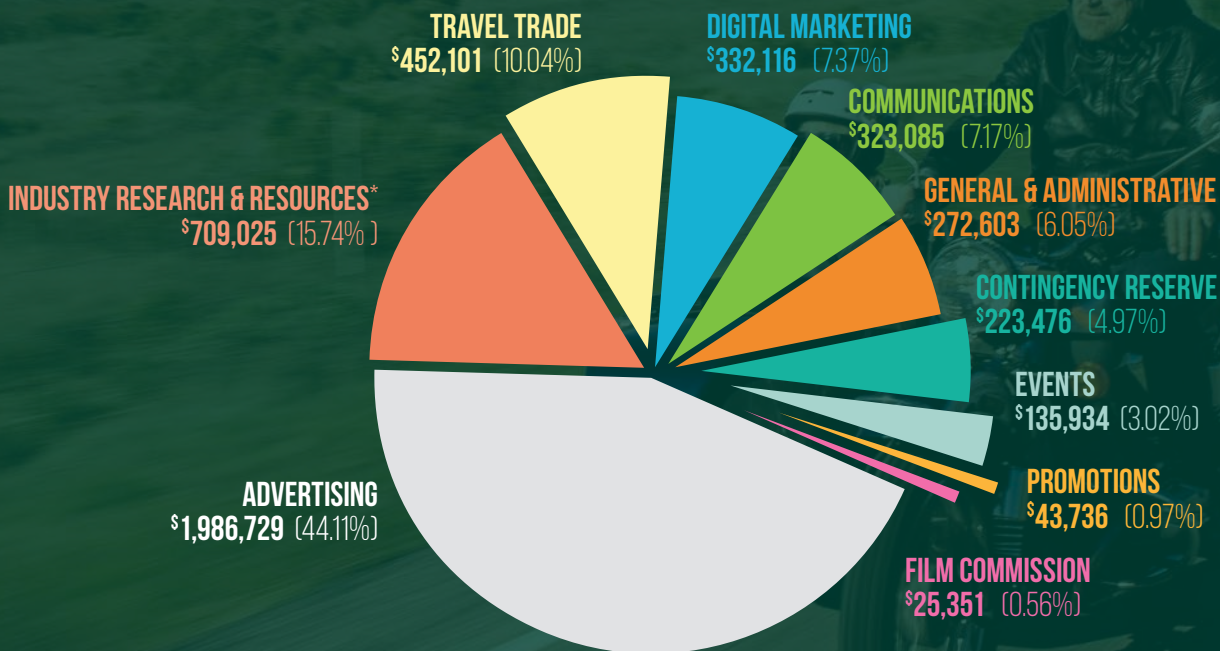
There are no proposed boundary, zone or classification changes for the coming year.

ASSESSED FUNDS FROM FY 2018/19*



*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



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



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