



**FY
26**

**BUSINESS &
MARKETING PLAN**



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LETTER FROM THE PRESIDENT & CEO

Dear Visit SLO CAL Investors, Partners & Stakeholders,



As we look forward to Fiscal Year 2026 (FY 26), I am energized by the opportunities that lie ahead for Visit SLO CAL. Our region has firmly established itself as a premium destination, consistently attracting visitors and driving tourism growth. This vibrant sector contributes more than \$2.3B to our local economy. As we continue to share our unique story and diverse offerings, we remain committed to balancing the needs of our residents and enhancing their quality of life.

This past year, we reaffirmed our commitment to a shared purpose and direction. The results have been transformative. I'm proud of the progress we've made together shaping SLO CAL into a dynamic and resilient destination. The annual SLO CAL Summit was a key moment in this transformation. With the theme of radical collaboration, the sold-out summit set a new attendance record and brought together investors, partners and stakeholders from across the region to share challenges, discover solutions and reinforce the strength gained by working together toward a common goal.

Bringing together thought leaders from diverse sectors, we moved the discussions on workforce development and last-mile transportation challenges forward. The "My SLO CAL" nomenclature campaign has sparked a sense of pride and ownership among locals. Through a partnership with Visit California, VSC brought the Tourism Exchange to life, making our unique SLO CAL experiences bookable online and increasing domestic and international business opportunities.

Our hero brand campaign, "*The Land Of...*," continues to generate top-of-mind brand awareness and drive engagement with destination partners. FY 26 will debut an evolution of brand campaign creative that will complement the tremendous brand equity already built, while continuing to promote our brand ethos Life's Too Beautiful to Rush®.

We are thrilled to welcome Molly Cano as our new Vice President of Marketing. With her extensive experience and deep relationships in the region, Molly has already made a significant impact and is an invaluable asset to our team as we look to the future.

As we begin our work in the new fiscal year, the spirit of radical collaboration will remain at the heart of what we do. In light of current geopolitical challenges and a complex travel landscape marked by economic uncertainty, we are confident that our collaborative efforts can help us meet the challenges and opportunities ahead. By continuing to work together, we are certain that we will build on the momentum of this year and continue to strengthen SLO CAL as the destination of choice for travelers worldwide.

Thank you for your unwavering commitment to Visit SLO CAL. With your support, the year ahead holds unlimited potential.

A handwritten signature in black ink that reads "Cathy Cartier".

Cathy Cartier

President & CEO, Visit SLO CAL

STRATEGIC DIRECTION 2026

Vision

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

Mission

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

Values

STEWARDSHIP

We value our people and care for our community and resources

AUTHENTICITY

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

INCLUSION

We engage and collaborate with an array of voices and perspectives

EXCELLENCE

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

FUTURE FOCUS

We deliver today with an innovative eye on tomorrow

Strategic Objectives

Enhance our organizational effectiveness

Amplify and steward the SLO CAL brand through unified efforts

Lead the county tourism industry in fostering a vibrant destination

Demonstrate value to investors, partners, stakeholders and communities

Visit SLO CAL (VSC) is a team of destination marketing professionals who work with, and on behalf of, its investors, partners, stakeholders and communities to promote SLO CAL (San Luis Obispo County, California) to both domestic and international visitors. As the countywide nonprofit destination marketing and management organization (DMMO) for SLO CAL, VSC's goal is to collaborate with partners to build 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.

ALIGNING THE VISION

Strategic Direction 2026 serves as Visit SLO CAL (VSC)'s north star. The Operational Plan and Experience SLO CAL 2050, the organization's destination management strategy, works to inform the annual Business & Marketing Plan, which outlines the annual program of work. VSC sets Objectives and Key Results (OKRs) across disciplines, all of which align with the overarching organizational OKRs and tracks the progress of each department and team member. The impact of this work is seen through increased destination awareness, which drives the organization's economic impact.



BUSINESS & MARKETING PLAN

Future Focused: The Roadmap to 2026

Visit SLO CAL (VSC) has defined four overarching organizational objectives in Strategic Direction 2026, including strategies and measurable key results. The FY 2026 strategies and key results for each department ladder up to these objectives.

Objective 1:

ENHANCE OUR ORGANIZATIONAL EFFECTIVENESS

STRATEGIES:

- Advance processes, procedures and workflows
- Implement upskilling opportunities and findings identified in the 2025 skills assessment and talent mapping exercise
- Celebrate, recognize and develop the VSC team
- Cultivate a values-centered culture reflective of the SLO CAL lifestyle

KEY RESULTS:

- Finalize company standard operating procedures by November 30, 2025
- Develop and publish an updated 4-year VSC strategic plan, Strategic Direction 2030, by June 30, 2026
- Maintain or grow annual employee engagement and satisfaction scores over 2025 baseline by June 30, 2026
- Continuously evaluate and improve VSC's benefits, wellness offerings and career development opportunities to remain competitive with local market and industry standards

Objective 2:

AMPLIFY AND STEWARD THE SLO CAL BRAND THROUGH UNIFIED EFFORTS

STRATEGIES:

- Continue to build on House of Brands marketing strategy
- Increase share of voice through integrated storytelling efforts
- Increase local adoption of SLO CAL nomenclature

KEY RESULTS:

- Create and share eight paid partner participation opportunities to collaborate on VSC marketing efforts by September 30, 2025
- Update and execute second phase nomenclature strategy by January 31, 2026
- Produce and launch new paid SLO CAL brand campaign by February 28, 2026
- Develop and deploy a social-first content campaign designed to support, enhance and extend the reach of the brand platform through social and earned channels by April 30, 2026



Objective 3:

LEAD THE COUNTY TOURISM INDUSTRY IN FOSTERING A VIBRANT DESTINATION

STRATEGIES:

- Champion improvements in intra-county transportation
- Finalize a Sustainable Tourism Strategy for SLO CAL
- Implement a Regional Tourism Industry Workforce Plan

KEY RESULTS:

- Launch SLO CAL Welcome 2.0 by July 1, 2025
- Implement Regional Tourism Industry Workforce Plan by September 30, 2025
- Conduct visitor profile study to inform new brand strategy and address increased lodging inventory by October 31, 2025
- Continue collaborating with community partners to finalize and implement a roadmap for a regional sustainable tourism strategy by December 31, 2025

Objective 4:

DEMONSTRATE VALUE TO INVESTORS, PARTNERS, STAKEHOLDERS AND COMMUNITIES

STRATEGIES:

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

KEY RESULTS:

- Conduct annual lodging forecast to inform budget and direction by December 31, 2025
- Secure 50 local media stories to promote positive impacts of tourism by June 30, 2026
- Achieve a 3% year-over-year increase in investor, partner and stakeholder engagement by June 30, 2026

DESTINATION PARTNERS

Representing the voice of the larger community, Visit SLO CAL (VSC) partners with organizations on a state and national level to foster the greatest impact for local destination partners and tourism businesses. VSC reviews the broad array of opportunities offered, strategically identifying the initiatives that will create the strongest return on investment and cascade those down to local communities. Having a seat at the table allows VSC to leverage opportunities in larger advocacy, marketing and sales initiatives while maximizing human and financial capital.



KEY MOMENTS FY 2025

1.

In September 2024, Visit SLO CAL (VSC) hosted the annual SLO CAL Summit, drawing a record-breaking sold-out crowd of over 250 tourism leaders, partners, investors and stakeholders from across the region. The event theme, “Radical Collaboration,” was brought to life by keynote speakers Geoff Freeman, President and CEO of the U.S. Travel Association, and Dr. Eric Solomon, CEO of The Human OS. Their remarks emphasized the vital role of innovative partnerships and community engagement in driving travel and tourism in the region.

2.

In July and October, VSC conducted in-depth ethnographic research through intercepts at 10 key locations across the region. This initiative aimed to gain deeper insights into visitors’ perceptions of SLO CAL, exploring how they experience and engage with the destination. By capturing feedback during both peak and shoulder seasons, while visitors were in-market, this research provided valuable data used to inform and evolve the SLO CAL marketing and advertising campaign platforms.

3.

In collaboration with six distinctive destinations across the region, VSC created and launched three episodes of “*Unpacking SLO CAL*”—an engaging social-first content series highlighting unexpected adventures in SLO CAL. This partnership highlights authentic adventures through the perspectives of travel-focused social media creators, emphasizing unique aspects of each destination while amplifying their reach through both owned channels and VSC’s paid media distribution.

4.

The San Luis Obispo County Regional Airport (SBP) set a new record in 2024 with 746,764 passengers, marking a 13% increase from the previous record. Over the past decade, passenger traffic has grown by 144%, reflecting the successful partnership between the airport and VSC in promoting regional tourism and investing in airline route development.

5.

VSC’s international strategy significantly boosted brand awareness for the destination. The Sales and PR teams embarked on a U.K. Sales and Media Mission during Brand USA’s Travel Week in October, meeting with over 140 representatives. Combined with IPW, other travel shows, and a dedicated UK agent, familiarity (FAM) trip in the fall, these efforts resulted in an 11% increase in brochure inclusion and over 40 articles with a reach of 25M.



BUSINESS & MARKETING LANDSCAPE





MACRO ENVIRONMENT

As the U.S. travel and tourism industry faces geopolitical headwinds and a shifting travel landscape, California's leisure brand remains strong. Through strategic foresight and collaboration, the tourism industry has demonstrated its ability to navigate this evolving environment. By leveraging California's status as a premier travel destination and the fourth largest economy in the world, the industry is well positioned to address challenges, seize opportunities and amplify the values that define the state.

U.S. ECONOMIC OUTLOOK

The policies and pronouncements of the U.S. federal administration have led to a shift in sentiment among international travelers, creating a negative outlook for travel to the U.S. The full impact on international visitation is expected to peak in 2025, with potential continued effects until 2028.

KEY DRIVERS OF NEGATIVE SENTIMENT

- Geopolitical tensions surrounding trade and national security policies
- Charged rhetoric and unilateral posturing
- High visibility border security and immigration enforcement actions, which are expected to create uncertainty and discourage visitation

As part of the Tourism Economics Global Travel Service update released in March 2025, the forecast for inbound international travel to the U.S. was revised downward from an increase of 9% to a 9.4% decline in international visitor arrivals for the year, led by a 20.2% decrease in visitation from Canada, with risks still skewed to the downside.

IMPACT OF RECENT FEDERAL POLICY CHANGES

The executive branch's April 2025 announcement of tariff hikes, surpassing previous assumptions, signals an even more aggressive trade policy and heightened international tensions. This shift reinforces concerns that the negative impact on U.S. inbound travel may be more severe than initially anticipated.

This elevated uncertainty is expected to result in reduced discretionary spending, including domestic travel, as households and businesses reassess their financial priorities.

VISITOR SPENDING DECLINE

- International visitor spending in the U.S. is expected to fall by 5.0% this year, translating to a \$9B loss
- A significant portion of this decline is attributed to fewer Canadian visitors, accounting for \$3.4B in lost spending
- Domestic travel spending growth in 2025 has been lowered to 3.9%

U.S. DOLLAR APPRECIATION

The U.S. dollar has continued to appreciate since the presidential election, reaching its highest level in nearly 40 years. This has made the U.S. more than 25% more expensive as a destination compared to the average over the past 15 years, based on a tourism-weighted exchange rate. This lack of cost competitiveness has been a key factor in the subdued performance of U.S. inbound travel relative to other destinations.

CALIFORNIA TRAVEL FORECAST

There is strength in California's brand, and research confirms that travelers remain drawn to the state's spirit of adventure, freedom and diversity of experiences. California is well-positioned to meet shifting demand and economic uncertainties.

While international tourism has long been a cornerstone of California's economy, new political and economic headwinds are testing that momentum. Based on the updated national outlook from Tourism Economics, Visit California now projects \$160B in total visitor spending—a modest 2.3% year-over-year increase, down from the \$166B and 6.2% growth Visit California anticipated in early 2025.

California remains the No. 1 travel destination in the United States, and last year international travelers spent \$26.5B at California businesses—a 17.5% increase over 2023. International travelers continue to show a deep affinity for California. While global sentiment toward U.S. travel is softening, California remains more favorable than the nation as a whole.





REGIONAL IMPACT ON SLO CAL

Despite broader travel challenges, SLO CAL remains resilient due to its strong reliance on regional domestic visitation. The region's appeal as a road trip destination positions it for continued success. SLO CAL's scenic drives, authentic small-town charm and slower pace position the region as an ideal choice for travelers in Visit SLO CAL's key fly/drive markets.

With the current global economic uncertainty, affordability and budget-friendly activities are among SLO CAL's key strengths, with outdoor experiences like hiking, cycling and 80+ miles of pristine coastline in abundance at little to no cost. The region's natural beauty and local attractions are accessible for all, making the region an ideal destination for those seeking budget friendly vacation destinations.

SLO CAL's unique local experiences further enhance the region's appeal, with vibrant food scenes, locally made craft products and family-friendly events that provide authentic, memorable visits.

Although international travel may be cooling, strong interest in U.S. travel from the UK and Ireland, a key market for SLO CAL, continues. Visitors from these regions remain positive about California travel, with interests that align well with SLO CAL's offerings, including abundant sunshine, diverse outdoor experiences and wide-open scenic roads.

Source: U.S. Travel Association, Tourism Economics and Visit California

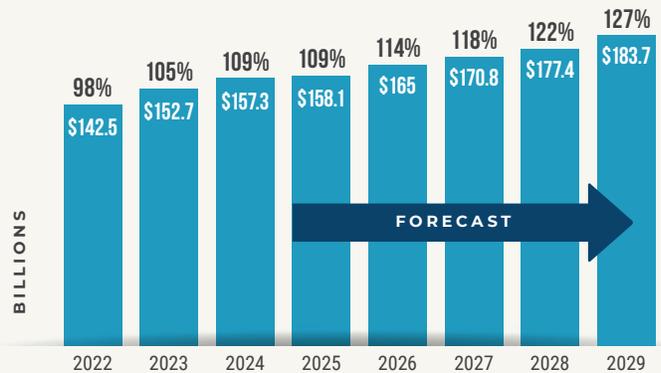
TRAVEL LANDSCAPE

The travel landscape has moved into a slower-growth phase. Domestic demand is steady, but higher prices, inflation and tighter household budgets are limiting year-over-year gains, while a strong dollar, visa delays and trade frictions weigh on international arrivals. California's large drive-market and diverse offering provide resilience, yet analysts expect only modest growth as businesses reduce conference travel and consumers shorten trips and spending. Maintaining market share will require clear messaging, agile promotion and continual attention to visitor value.

CALIFORNIA'S TOURISM INDUSTRY
CONTINUES TO GROW

\$157B VISITOR
SPENDING
2024

TOTAL CALIFORNIA TRAVEL SPENDING
RECOVERY PERCENT RELATIVE TO 2019



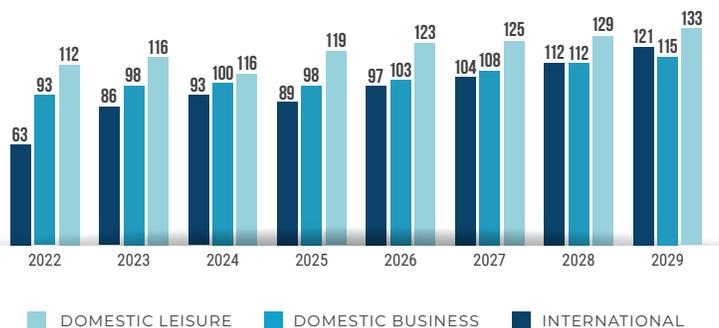
Source: Tourism Economics, May 2025

DOMESTIC LEISURE TRAVEL
DEMAND CONTINUED TO

LEAD STATE
RECOVERY
IN 2024

FORECAST COMPARISON: VISITOR SPEND TO CALIFORNIA BY KEY SECTORS

(2019 = 100)



Source: Tourism Economics, May 2025

VISITOR SPENDING (BEFORE ADJUSTING FOR INFLATION)

FULLY RECOVERED TO 2019 LEVELS IN 2023 BUT VISITOR VOLUME IS NOT FORECAST UNTIL 2028

VISITATION AND SPEND FORECAST COMPARISON

Recovery Index (2019 = 100)

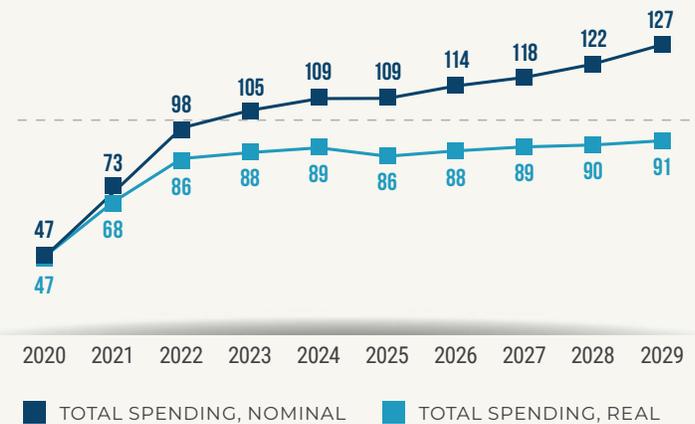


Source: Tourism Economics, May 2025

WHEN ADJUSTED FOR INFLATION, REAL VISITOR SPENDING IS PROJECTED TO REMAIN BELOW 2019 LEVELS THROUGH 2029

VISITOR SPENDING RECOVERY: THE IMPACT OF INFLATION

Percent Relative to 2019



Source: Tourism Economics, May 2025

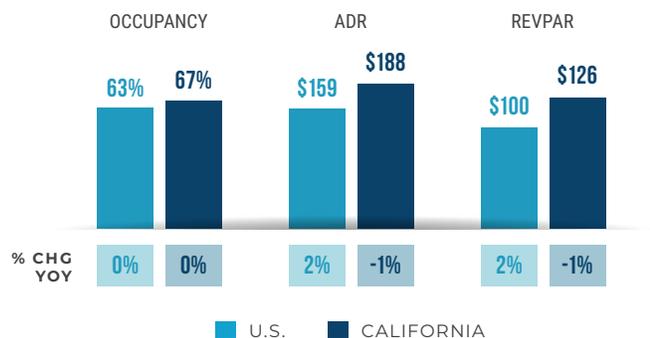
CALIFORNIA'S LODGING SECTOR CONTINUED TO

OUTPERFORM THE U.S. ON KEY PERFORMANCE METRICS

BUT YOY GROWTH RATES SLOWED AS PENT-UP TRAVEL DEMAND EASED

U.S. & CALIFORNIA HOTEL PERFORMANCE METRICS

December 2024 YTD



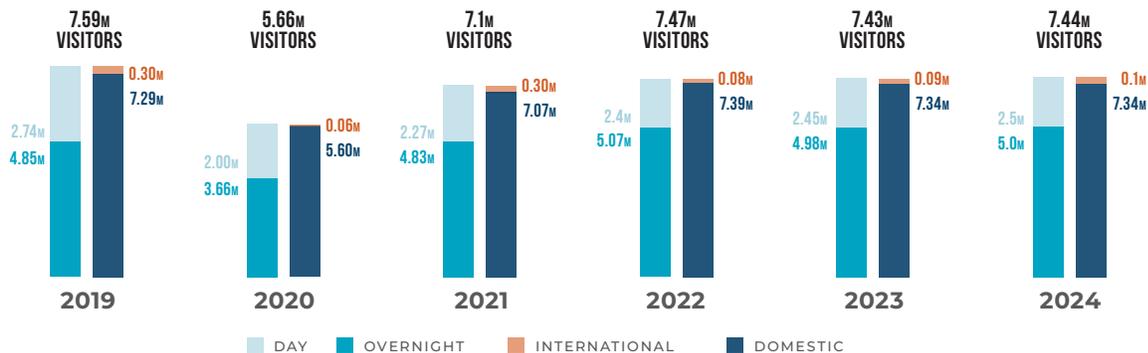
Source: CoStar Group, STR, LLC., Tourism Economics. Data as of April 2025.

SLO CAL LANDSCAPE

Market & Performance Trends

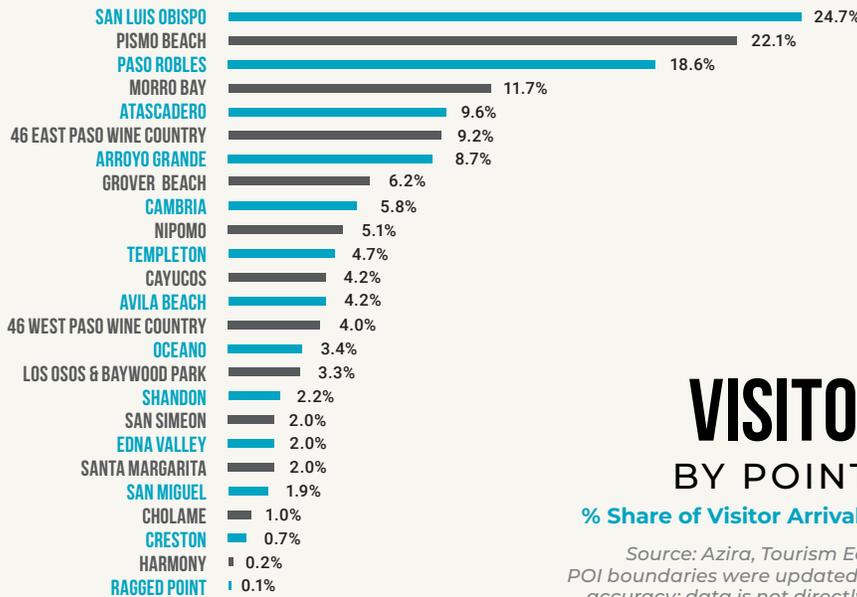
Between 2025 and 2031, the total number of hotel and motel rooms under construction or in the planning pipeline across SLO CAL could increase lodging supply by 38.1%. Based on projections and publicly available development filings, delivery timelines and final counts may shift. With supply on the rise and travel demand normalizing post-pandemic, generating destination demand becomes even more critical, especially as the region is already showing softer trends in visitor volume, occupancy, Average Daily Rate (ADR), Revenue Per Available Room (RevPAR) and Transient Occupancy Tax (TOT) as illustrated in the accompanying charts.

DATA INSIGHTS



Visitor Trend data is based on calendar year. Source: Tourism Economics. Data as of April 2025.

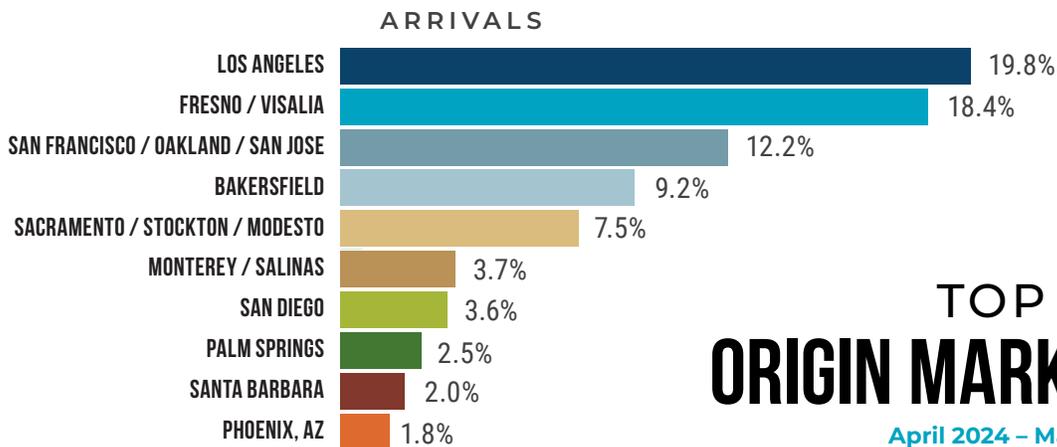




VISITOR ARRIVALS BY POINT OF INTEREST

% Share of Visitor Arrivals | April 2024 – March 2025

Source: Azira, Tourism Economics. Data as of April 2025. POI boundaries were updated in FY 25 for greater geographic accuracy; data is not directly comparable to previous years.



TOP TEN ORIGIN MARKETS

April 2024 – March 2025

Source: Azira, Tourism Economics. Data as of April 2025. Percentage share of visitors and origin markets represents data from tracked devices and do not estimate total devices or total visitors.

CROSS-VISITATION

1.5 **0.0%**
INCREASE
YOY APRIL-MARCH

COMMUNITIES PER
UNIQUE ARRIVAL

April 2024 – March 2025

LENGTH OF STAY

1.9 **↑0.2%**
INCREASE
YOY APRIL-MARCH

DAYS

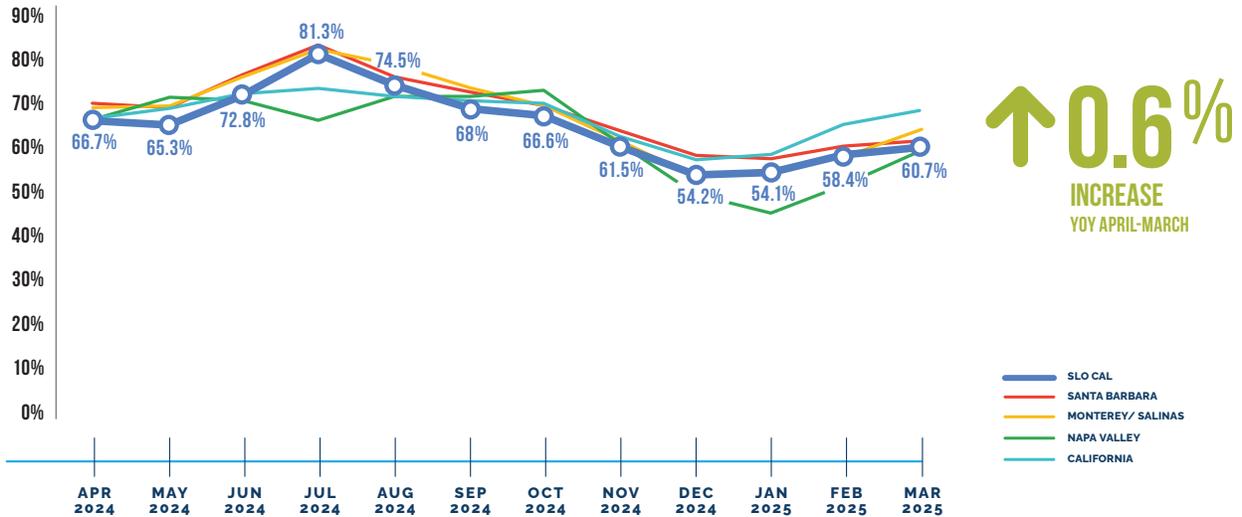
April 2024 – March 2025

Source: Azira, Tourism Economics. Data as of April 2025.

SLO CAL LANDSCAPE

Market & Performance Trends (continued)

HOTEL OCCUPANCY (OCC)



Source: CoStar Group, STR, LLC., Tourism Economics. Data as of April 2025.

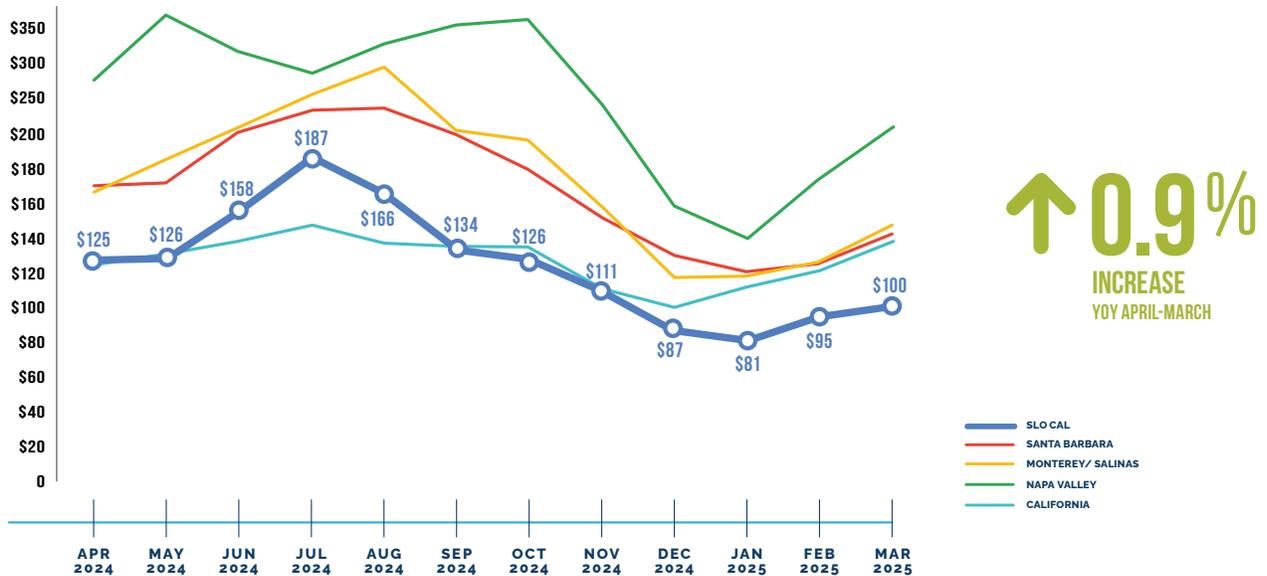
AVERAGE DAILY RATE (ADR)



Source: CoStar Group, STR, LLC., Tourism Economics. Data as of April 2025.

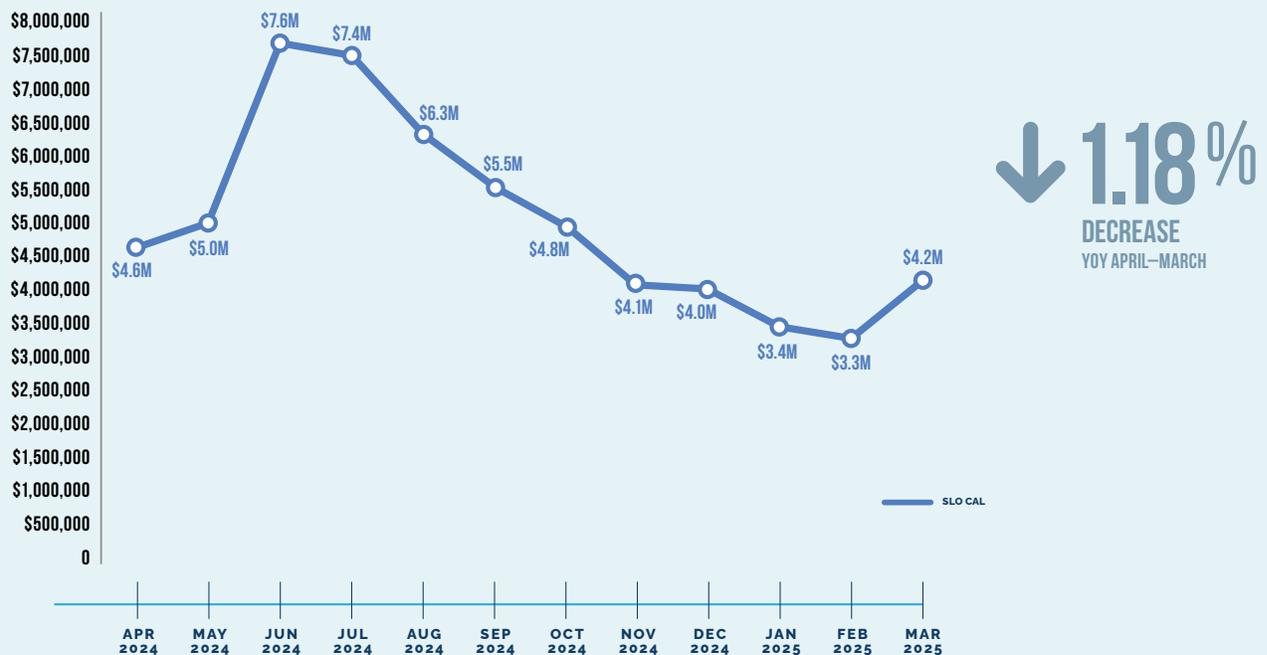


REVENUE PER AVAILABLE ROOM (REVPAR)



Source: CoStar Group, STR, LLC., Tourism Economics. Data as of April 2025.

TRANSIENT OCCUPANCY TAX (TOT)



Source: Visit SLO CAL, Tourism Economics. Data as of May 2025.

WHY TOURISM MATTERS



TRAVEL SPENDING

\$2.4B ↑2.6%
INCREASE YOY

\$6.5M a day | \$273K an hour | \$4.5K a minute | \$75 a second

INDUSTRY EARNINGS

\$953.1M
↑4.3% INCREASE YOY



TOURISM PUTS

23,820 ↑3.7%
INCREASE YOY

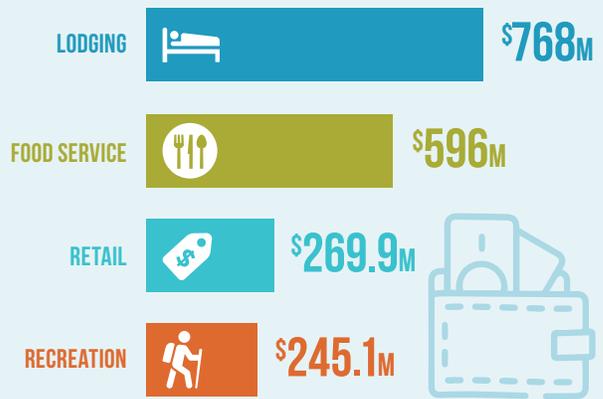
RESIDENTS TO WORK EACH DAY

TOURISM CONTRIBUTES

\$60.1M ↑.04%
INCREASE YOY

IN TRANSIENT OCCUPANCY TAX REVENUE

DIRECT SPENDING BY SECTOR



WITHOUT VISITORS
EACH SLO CAL HOUSEHOLD
WOULD NEED TO SPEND
AN ADDITIONAL **\$21,707**

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
\$1,855 in taxes



TRAVEL SPENDING
CREATED
\$105.6M
IN LOCAL
TAX REVENUE

which could cover the expenses for

940 POLICE OFFICERS' SALARIES

OR

1,419 FIREFIGHTERS' SALARIES

OR

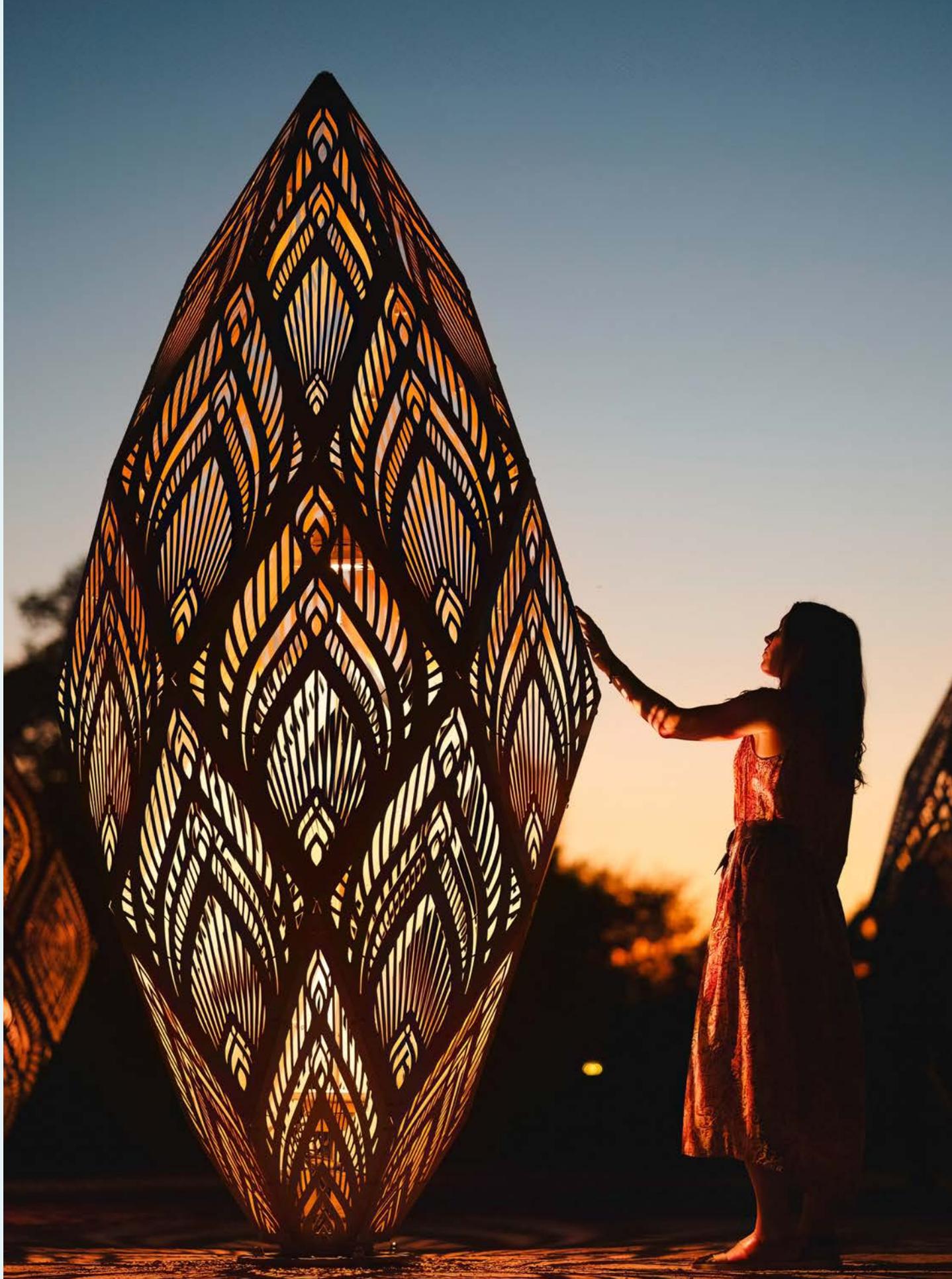
1,189 TEACHERS' SALARIES

OR

176 MILES OF RESURFACED ROADS

TOURISM COMPRISES **10.39%** OF COUNTYWIDE GDP

Data based on 2024 calendar year. Source: 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, County of San Luis Obispo Department of Public Works



TRAVEL TRENDS

“There has been a notable shift from focusing on a trip to-do list to an emphasis on how one feels during travel.”

— VIRTUOSO

Today's Travelers Prioritize:

77% Curiosity and Exploration

65% Joy and Happiness

57% Awe and Wonder

Source: Virtuoso

AWAYBORHOODS

Travelers are embracing the concept of “awayborhoods” by seeking accommodations in residential neighborhoods rather than traditional tourist hotspots. This shift reflects a growing interest in experiencing destinations through a local lens, with activities such as grocery shopping and visiting neighborhood cafes providing cultural immersion.

CULINARY

Today's travelers continue to seek a more immersive experience through culinary offerings. From a rise in the importance of hotel restaurants to “agrihoods,” neighborhoods that integrate agriculture, there is a growing interest in locally sourced, farm-to-table dining and hands-on participatory experiences found across a destination and these are as significant as visiting landmarks.

DETOUR DESTINATIONS

Travelers are increasingly interested in exploring lesser known, off the beaten path destinations. In the hunt for the less crowded and less well-known, 63% of consumers express a desire to visit detour destinations on their next trip. Detours can be a great way to experience different aspects of a place, to get a more authentic experience or try a new kind of adventure they might not have otherwise.

FLOCKING

Gen Z, the most digitally connected generation, is actively seeking offline experiences to build meaningful, in-person connections. Unfulfilled by the superficiality of online interactions, 74% of Gen Z travelers are more likely to research destinations that provide opportunities to meet new people. Gen Z will be “flocking” to destinations with communal spaces that offer in-person activities to forge connection.

MULTIGENERATIONAL TRAVEL EXPANDS

By 2025, seven generations will be traveling together, marking a historical first. The youngest of these, known as 'Beta Babies,' will be born to Gen Z parents, while other traveling generations will include Generation Alpha, Millennials, Generation X, Boomers and 'the Matures.'

OENOTOURISM & LESSER-KNOWN WINE REGIONS

Curiosity about emerging wine regions is growing as travelers move beyond traditional destinations like Bordeaux, Tuscany, Napa and Sonoma. Boutique wineries and immersive, intimate wine experiences are on the rise.

SOUVEN-ERA & ART-VENTURES

A rise in "souven-era" tourism highlights travelers' desires to purchase locally crafted goods, valuing unique, handmade items that embody a destination's culture. 49% of American travelers choose destinations based on cultural experiences, incorporating art-focused activities into their itineraries. Promoting local markets, galleries and cultural events can further enhance a destination's appeal, with an emphasis on celebrating creativity and craftsmanship.

TOWNSIZING

There is a notable shift towards "townsizing," with travelers opting for small-town experiences that offer charm, nostalgia and a relaxed pace. Cozy destinations provide a sense of comfort and simplicity, appealing to those seeking respite from the busyness of urban life.



SLO CAL Opportunity

Today's trends continue to reinforce Visit SLO CAL's approach to marketing the region as a place where Life's Too Beautiful to Rush®—a place with people and a pace that differentiates. SLO CAL offers travelers a unique opportunity for local immersion and discovery. Experiences that map to these trends are found across its individual communities, and storytelling has been developed to lean into local makers, from goods to culinary to wine and spotlight SLO CAL's big-time natural beauty and adventure. Carrying forward this work and building upon it with fresh insight and marketing communications across channels is the opportunity ahead.

Sources: American Express, Condé Nast Traveler, Expedia, Forbes, Globetrender, Hilton, Pinterest, Priceline, Skyscanner, Virtuoso, World Travel & Tourism Council



MEDIA TRENDS: PAID

TREND	IMPLICATIONS
<p>DIGITAL MEDIA COMMANDS MAJORITY OF TIME SPENT</p> <ul style="list-style-type: none"> • Time spent engaging with media has peaked at 13+ hours per day • Digital media: 8+ hours • Traditional media: 4.5 hours 	<p>Maintain a digital first approach to most efficiently reach consumers where they spend the most time, while exploring traditional media to augment reach where budget allows</p>
<p>A MEDIA LANDSCAPE MORE FRAGMENTED THAN EVER</p> <ul style="list-style-type: none"> • Media consumption is driven by mobile, traditional TV and subscription OTT (i.e., Hulu, Amazon) • Audio streaming platforms and podcasts are growing as time with social media plateaus • Free ad supported streaming TV (FAST) has seen considerable growth (i.e., Roku, Tubi, Pluto) 	<p>Continue to focus on a wide range of digital media channels to account for variances in consumer preferences while experimenting with new opportunities (i.e., podcasts, FAST channels) to extend reach and help elevate brand affinity</p>
<p>“TV” VIEWING VARIES BY GENERATION</p> <ul style="list-style-type: none"> • Older generations drive time spent with linear TV while younger audiences are driving connected TV growth • Advances in technology are making both linear and connected TV more targetable with opportunities for better personalization 	<p>Connected TV remains the most cost-effective approach for reaching the majority of SLO CAL’s ‘Purposeful Travelers’</p>
<p>LIKE TV, SOCIAL MEDIA USE ALSO VARIES BY AGE</p> <ul style="list-style-type: none"> • YouTube is the most widely used by all generations • Younger generations favor Instagram and TikTok, while older audiences favor Facebook 	<p>Continue to lean into proven channels where SLO CAL engagement is strong while keeping an eye on secondary platforms with potential to reach a younger traveler</p>
<p>PROLIFERATION OF DIGITAL OUT-OF-HOME (DOOH)</p> <ul style="list-style-type: none"> • More DOOH units come online every day allowing marketers to extend deeper into daily life • New programmatic technology has led to more engaging and impactful environments for creative messaging, while also driving more precise targeting and better measurement 	<p>Explore new DOOH technologies in key markets to showcase the SLO CAL experience and test messaging prompts to stimulate interest and inspire exploration (pending budget prioritization)</p>
<p>THE INTERNET WILL BE COOKIE FREE (AT SOME POINT)</p> <ul style="list-style-type: none"> • Google announced it would no longer deprecate cookies in July 2024, shifting to a model that gave consumers a choice (less than 20% of users accept cookies) • Other major browsers removed cookie targeting years ago 	<p>Continue to explore opportunities to target without cookies, leaning into partner provided first-party options and building on pilot efforts where audience scale was achieved without a decline in performance</p>
<p>ARTIFICIAL INTELLIGENCE WILL CONTINUE TO BE A DRIVING FORCE</p> <ul style="list-style-type: none"> • Generative AI enhances the search experience, providing users with more options • Many media publishers are testing new AI tools to personalize consumer experience 	<p>Continue to utilize AI to reach prospective travelers and augment investment as additional technology becomes available through media partners to enhance paid activity</p>

Source: eMarketer

MEDIA TRENDS: OWNED

TREND	IMPLICATIONS
<p>ORIGINALITY TAKES CENTER STAGE</p> <ul style="list-style-type: none"> Instagram’s algorithm now prioritizes original content, aiming to reduce the visibility of reposted material and aggregator accounts Content is being served to broader audiences beyond traditional follower bases, adopting a discovery model like TikTok 	<p>The evolution of Meta’s algorithm increases the need for original content to gain traction. VSC will continue to prioritize bespoke, high-quality assets that speak directly to the SLO CAL experience, rather than repurposing existing material</p>
<p>AI’S DUAL ROLE IN CONTENT CREATION AND DISCOVERY</p> <ul style="list-style-type: none"> Artificial Intelligence is reshaping both the creation and curation of content Audiences, particularly Gen Z, show a strong preference for authentic, human-led storytelling 	<p>AI has its place behind the scenes, but audiences still crave authenticity VSC will continue to develop human-led, emotionally resonant content, using AI tools only to support, not replace, creative storytelling</p>
<p>RESURGENCE OF LONG-FORM VIDEO CONTENT</p> <ul style="list-style-type: none"> Platforms like Instagram are expanding support for longer-form video content Long-form video generates more saves, comments and discoverability 	<p>As audiences embrace longer video formats, VSC will continue to develop content that leans into longer-form storytelling Content will adapt in line with platform updates, offering viewers a richer perspective of the SLO CAL region</p>
<p>THE RETURN OF SOUND IN SOCIAL MEDIA CONTENT</p> <ul style="list-style-type: none"> A growing majority of Instagram Reels are now watched with sound on, around 80% Captions remain critical for accessibility and retention 	<p>With more users watching with the sound on, VSC will continue to consider audio-music, voiceover and ambient sound-as a tool to create more immersive content Captioning remains essential for accessibility and retention</p>
<p>COLLABORATIVE CONTENT AMPLIFIES REACH</p> <ul style="list-style-type: none"> Posts with collaborators can generate up to 5x the impressions Partnered content builds credibility and reach 	<p>Collaboration remains an efficient way to increase reach and build engagement VSC will continue to explore co-posting and collaborative storytelling with partners and relevant local organizations who share similar values</p>
<p>SOCIAL MEDIA AS A PRIMARY TOOL FOR TRAVEL DISCOVERY</p> <ul style="list-style-type: none"> Gen Z prefers TikTok and Instagram over Google for search Hashtag and location content increasingly drive travel decisions 	<p>Social is now a key source of travel inspiration. VSC will continue to craft content with discovery in mind, using SEO-friendly captions, geotags and the like to show up in traveler search journeys</p>

Source: eMarketer



MEDIA TRENDS: EARNED

TREND	IMPLICATIONS
<p>OFF THE BEATEN PATH DESTINATIONS</p> <ul style="list-style-type: none"> • 63% of travelers say they are likely to visit a lesser known, less crowded destination on their next trip • Traveling in 2025 is about lingering a little longer and adding a smart side-trip within easy reach of gateway cities 	<p>SLO CAL is the ideal detour destination from big cities like San Francisco and Los Angeles, where travelers can escape the “rat race” for a slower pace and array of offerings not found in getaway cities</p> <p>Already a topic Earned promotes to get drive market media in destination, this new trend provides a national media opportunity</p>
<p>WINE TOURISM</p> <ul style="list-style-type: none"> • Travelers have long ventured to wine regions for trips that are as indulgent as they are educational—packed with tastings, winery tours, bucolic vineyard scenery and shopping for cellar-worthy souvenirs • However, while renowned regions such as Bordeaux and Tuscany have been the traditional targets, curiosity around lesser-known and re-emerging wine destinations is growing 	<p>Led by two world class AVAs, Paso Robles and San Luis Obispo Coast, SLO CAL’s oenotourism is a perfect alternative to “old world” CA wine regions like Napa</p> <p>Leaning into SLO CAL’s laid back wine country provides travelers and media an authentic alternative to the exclusivity and high prices of more traditional wine regions</p>
<p>SMALL TOWN CHARM</p> <ul style="list-style-type: none"> • In the coming year, expect travelers to opt for quaint, comfy respites in America’s small towns • While Boomers are most likely to feel that small towns are more relaxing, Gen Z is looking to indulge in the charming, quaint moments-being 89% more likely than average travelers to seek out a vacation that offers a “Nancy Meyers-lifestyle” and 67% more likely to see a vacation as an opportunity to live out their small-town fantasies • 37% of young travelers believe that the neighborhood they stay in impacts their vacation experience 	<p>Whether it be a cozy roadside motel or a local’s favorite diner for breakfast, the distinct communities of SLO CAL offer the best of small-town charm for consumers and media</p> <p>The “Town sizing” / “Awayborhoods” trend has travelers and publications focused on smaller, more remote destinations with opportunities for major national coverage for smaller communities</p>
<p>CULINARY TRENDS</p> <ul style="list-style-type: none"> • 60% of luxury travelers prioritize staying at hotels with great restaurants • Amongst Gen Z, “fisherman” core is sweeping the fashion and design work, but this maritime-themed trend can span into the travel and culinary space as well • “Farm-to-fork” is becoming more participatory, as consumers seek bucolic country, farm retreats and ways to immerse in the rural upskilling in a trend coined, “Agrihoods” 	<p>SLO CAL’s culinary scene is one of the region’s best assets, with “sea-to-spoon” and “farm-to-fork” fare in abundance</p> <p>Tapping into “fisherman core,” Earned can promote immersive experiences like kelp foraging tours and “U-Shuck” oysters and SLO CAL’s “agrihoods” offer barn and farm experiences, plus the vibrant Downtown SLO Farmers’ Market</p>

Sources: Expedia, Hotels.com, Cision, Skyscanner, Axios, TIME

MEDIA TRENDS: EARNED

TREND	IMPLICATIONS
<p>GOODS GETAWAYS</p> <ul style="list-style-type: none">• Open TikTok and you'll see travelers packing vacuum-sealed French butter into travel-size coolers or stocking up on Korean "sheet masks"• It's all part of the new "souven-era," where travelers are building getaways around getting the goods• This trend is about maximizing the travel experience, with travelers researching brands as they set out to bring home the best their vacation destination has to offer	<p>SLO CAL is home to countless local craftspeople, this trend allows the Earned teams to showcase the depth of local artisans, including "SLO CAL Crafted" makers. Products found only in SLO CAL, Brown Butter Cookie Co., Taddo's Tallow, Pasolivo, etc. draw in tourists and media alike</p>
<p>ART-VENTURES</p> <ul style="list-style-type: none">• Larger-than-life experiences that allow the audience to step inside the canvas are becoming the norm• 49% of American travelers say culture is the most important reason for choosing a vacation destination• How art is being consumed is changing to become more immersive	<p>This trend provides an opportunity to promote experiences like Sensorio, Hearst Castle, San Luis Obispo Museum of Art and more, allowing visitors to explore the rich arts and cultural scene in SLO CAL</p>

Sources: Expedia, Hotels.com, Cision, Skyscanner, Axios, TIME





THE NEXT CHAPTER OF SLO CAL BRAND-BUILDING



SLO CAL BRAND BHAG

(Big Hairy Audacious Goal)



In 2021, Visit SLO CAL (VSC) established the SLO CAL BRAND BHAG (Big Hairy Audacious Goal)—for SLO CAL to become as well-defined, well-known, and well-loved as So Cal (Southern California) and Nor Cal (Northern California).

Over the past four years, a robust marketing program has been developed to tell the SLO CAL story and create meaningful content that connects with travelers and inspires them to visit, driving performance for the region’s assessed lodging businesses and local destination partners.

EACH YEAR, MORE DEPTH AND DIMENSION HAVE BEEN ADDED TO VSC'S BRAND ARSENAL

BRAND CAMPAIGN LAUNCH

FY 22

Hero Brand campaign launch

HOUSE OF BRANDS

FY 22

Developed suite of House of Brands co-op assets

SLO CAL CRAFTED

FY 23

Expanded owned channels for launch in paid program



YEAR 1

"The Land of..." Brand Campaign

"The Land of..." campaign serves as the Hero brand storytelling layer, showcasing the region of SLO CAL and its overarching consumer promise:

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

YEAR 1

"The Land of..." House of Brands

Working with each of the region's individual destination partners, VSC developed a House of Brands approach to unify and connect each to the SLO CAL brand in meaningful ways that aid understanding by potential travelers. Co-branded logo lockups express that each unique town contributes to the friendly feeling of community among the individual communities.

Through "The Land of..." co-op, destination partners have dedicated storytelling assets specific to their town, and these are used as a secondary layer of VSC's brand campaign.

YEAR 2

"SLO CAL Crafted"

"SLO CAL Crafted" celebrates local artisans and the unique character of their locally made products through custom content that encapsulates the people, place, and pace of the region. Certification in the "SLO CAL Crafted" program requires businesses to locally make and sell tourism-leaning products or experiences available for purchase in the county and employ at least one resident full time. Currently there are more than 100 businesses who celebrate being "SLO CAL Crafted," from Morro Bay Oyster Company and Root Elixirs to Pasolivo Olive Oil, Surf Gems, and many others.

CROSS VISITATION & FAMILY

FY 23

Expanded storytelling to build greater understanding of proximity and ease of experience



SUSTAINABILITY

FY 24

WTTC content partnership



LOCAL: MY SLO CAL

FY 24

Local nomenclature campaign launched in service of the BHAG



YEAR 2

“The Land of...” Cross-Visitation

Cross-visitation storytelling was added to “The Land of...” campaign to connect experiences across SLO CAL communities and reinforce the proximity and ease of getting around. Featuring distinct experiences in two different towns around the region with a simple call to action to “start planning your journey across the land of SLO CAL now,” these assets provide greater context for the SLO CAL experience, while the cross-visitation messaging construct provides an opportunity for destination partners to engage with one another across social channels to demonstrate the proximity and complementary nature of their tourism offerings.

YEAR 3

“Sustainably SLO CAL”

Beyond its breathtaking landscapes, SLO CAL has embraced a holistic vision of sustainability that goes beyond mere environmental preservation to responsible travel and community well-being. In a visionary alliance with the World Travel and Tourism Council (WTTC), VSC illuminated the region’s stewardship path through a Destination Spotlight program featuring content that showcases sustainable narratives, elevates sustainable practices, and advocates for responsible tourism through empowerment of visitors and residents alike. “Sustainably SLO CAL” has expanded beyond the initial WTTC content to continue to shine a spotlight on compelling stewardship stories across communities.

YEAR 3

“My SLO CAL”

VSC serves as a community connector, working in service of all stakeholders across the region. Introduced in FY 2024, “My SLO CAL” is a locally focused effort that turns the lens inward and exposes residents to the SLO CAL brand story. The strategy is to tap into the deep sense of pride and affinity that comes with being a member of the SLO CAL community with the intended outcome to enhance adoption of the “SLO CAL” moniker.

EPISODIC CONTENT

FY 25

Influencer-led content series



WINE

FY 25

Breaking down the basics of wine



SUSTAINABILITY

FY 25

Social First Content Series



YEAR 4

“Unpacking SLO CAL”

The Land of SLO CAL offers endless possibilities. In this content series, travel-focused social media creators choose one of three mysterious suitcases from the baggage carousel at the San Luis Obispo Regional Airport (SBP), each packed for a different type of adventure. Each episode follows them as they pick a bag, then embark on a scavenger hunt-style trip full of experiences across the region. Watching these influencers embrace the unknown makes for an intriguing journey and a mix of filmed scenes and user-generated content (UGC) adds an authentic, fun vibe to the series.

YEAR 4

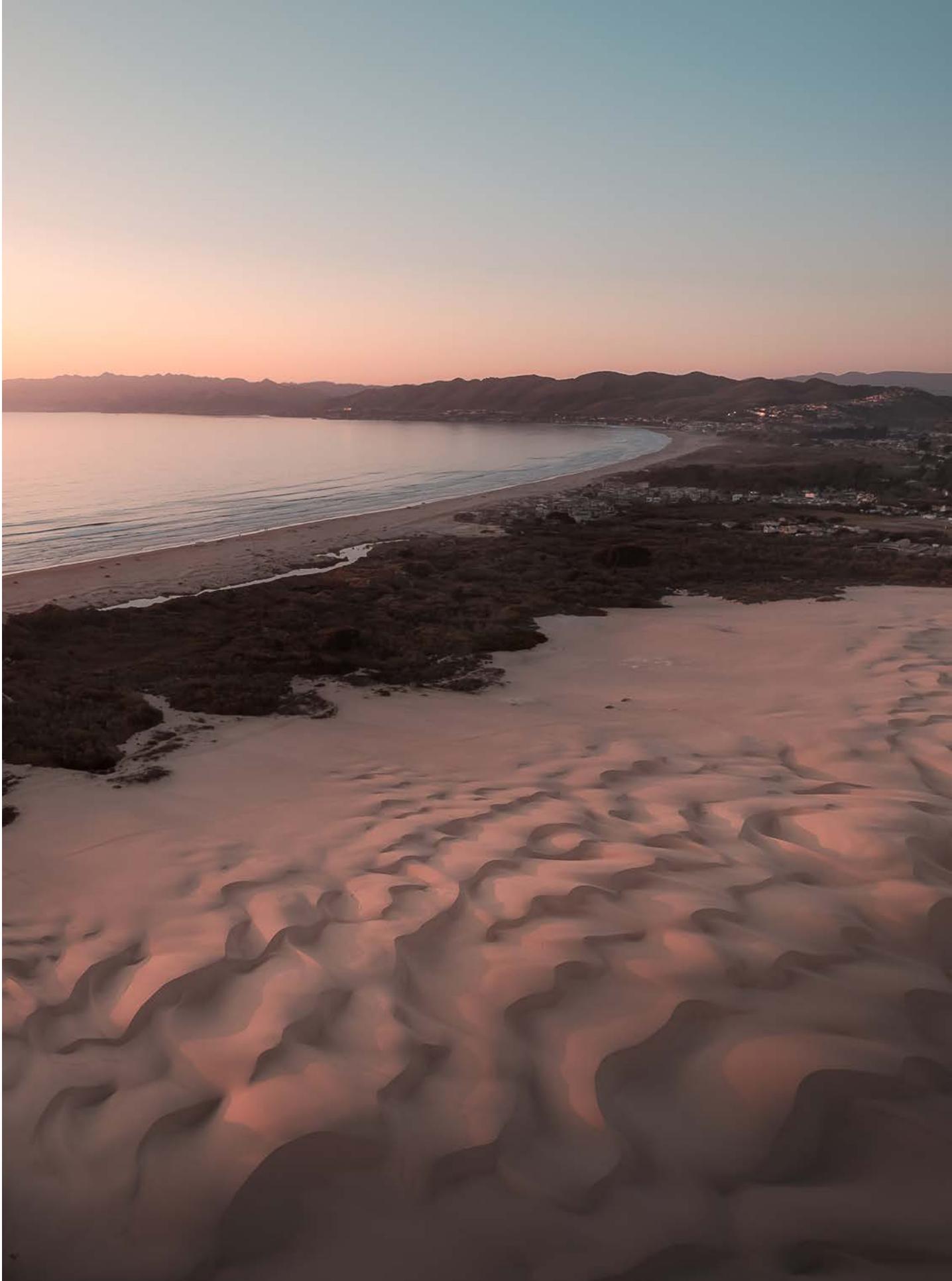
“Wine-O-One”

An eight-episode video series, *“Wine-O-One”* invites viewers to meet friendly, approachable winemakers who demystify wine in a fun and interactive way. With all the swirling, sniffing and talk of tannins, wine can feel intimidating, like there is a secret rulebook you never got. But here’s the truth—wine is simply about enjoyment, about finding something that tastes good and letting it enhance the moment. Developed in partnership with Travel Paso and Paso Robles Wine Country Alliance these short, approachable guides strip away intimidation, helping viewers learn the basics and talk about what makes wine great—all set against the stunning vineyards and relaxed charm of SLO CAL.

YEAR 4

“Sustainably SLO CAL”

An episodic social-first video series as part of VSC’s ongoing *Sustainably SLO CAL* initiative. *“Sustainably SLO CAL”* celebrates the region’s commitment to environmental stewardship. Through storytelling and local voices, the series showcases how sustainability is embedded in the culture, businesses and landscapes of the region. The sustainability series invites viewers to discover not only the breathtaking beauty of the region, but the people and practices preserving it. Even travelers who may not seek out eco-tourism can feel confident knowing their visit supports a region that values sustainability as a way of life.





BRAND PERFORMANCE





Visit SLO CAL (VSC) engaged Heart+Mind Strategies in July 2022 and July 2023 to determine the impact of the brand advertising campaign on key performance indicators and assess the return on advertising investment. The infographic on the following page highlights the year-over-year success across all measures.



MODE Online Survey

LENGTH 15 Minutes

DATES July 27 – August 9, 2023

AUDIENCE 18 years of age or older
(n=3,537) Traveled 50+ miles for leisure travel in past 12 months and stayed overnight in paid accommodation

GEOGRAPHY Los Angeles (n=502)
San Francisco (n=403)
Phoenix (n=410)
Dallas (n=403)
Sacramento (n=304)
San Diego (n=306)
Seattle (n=303)
Portland (n=305)
Las Vegas (n=301)
Denver (n=300)



SLO CAL BRAND CAMPAIGN TRACKING PERFORMANCE

JULY 2023

AWARENESS

12% **↑3%** YOY

UNAIDED RECALL

96%

AD FAVORABILITY

89%*

54%	Strongly Agree
35%	Somewhat Agree

REMINDS YOU THAT

Life's Too Beautiful to Rush®

**Indicates statistically significantly higher/lower vs. 2022 at 95% confidence level*

Perceptions of SLO CAL are far more positive among those who have seen the ads.

Brand Imagery	Total	Aware of Ads
Is a friendly, accepting place	58%	81%
Is a place with many unique small towns	54%	75%
Is easy to get around	51%	74%
Is a place that has its own unique vibe, different from both Southern California and Northern California	66%	80%

Brand Imagery	Total	Aware of Ads
A place that still embraces simple pleasures	63%	83%
Has small-town charm and big-time natural beauty	65%	82%
A place for people who like to wander	62%	82%
You can enjoy many unique experiences in one trip	60%	79%
A place filled with undiscovered gems	54%	77%

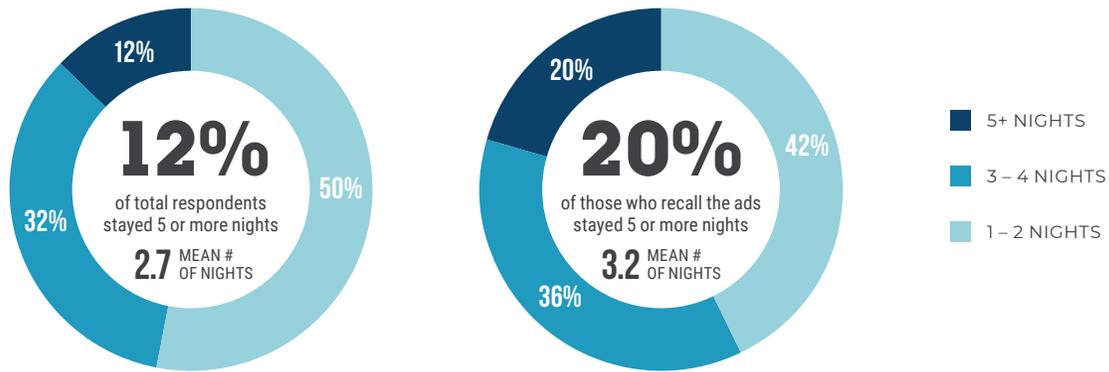
YOY NET PROMOTER SCORE IMPROVEMENTS

+9 TOTAL **+50** TOTAL AD AWARE

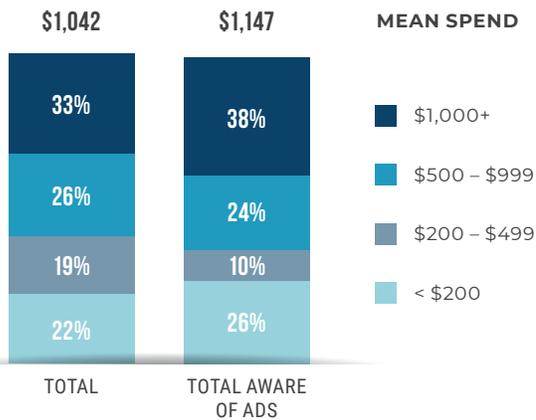


Those aware stay more nights, spend more money, and visit more locations.

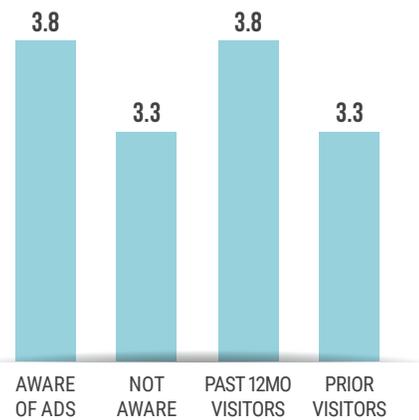
NUMBER OF NIGHTS STAYED



TOTAL TRIP SPEND



AVERAGE # OF LOCATIONS VISITED

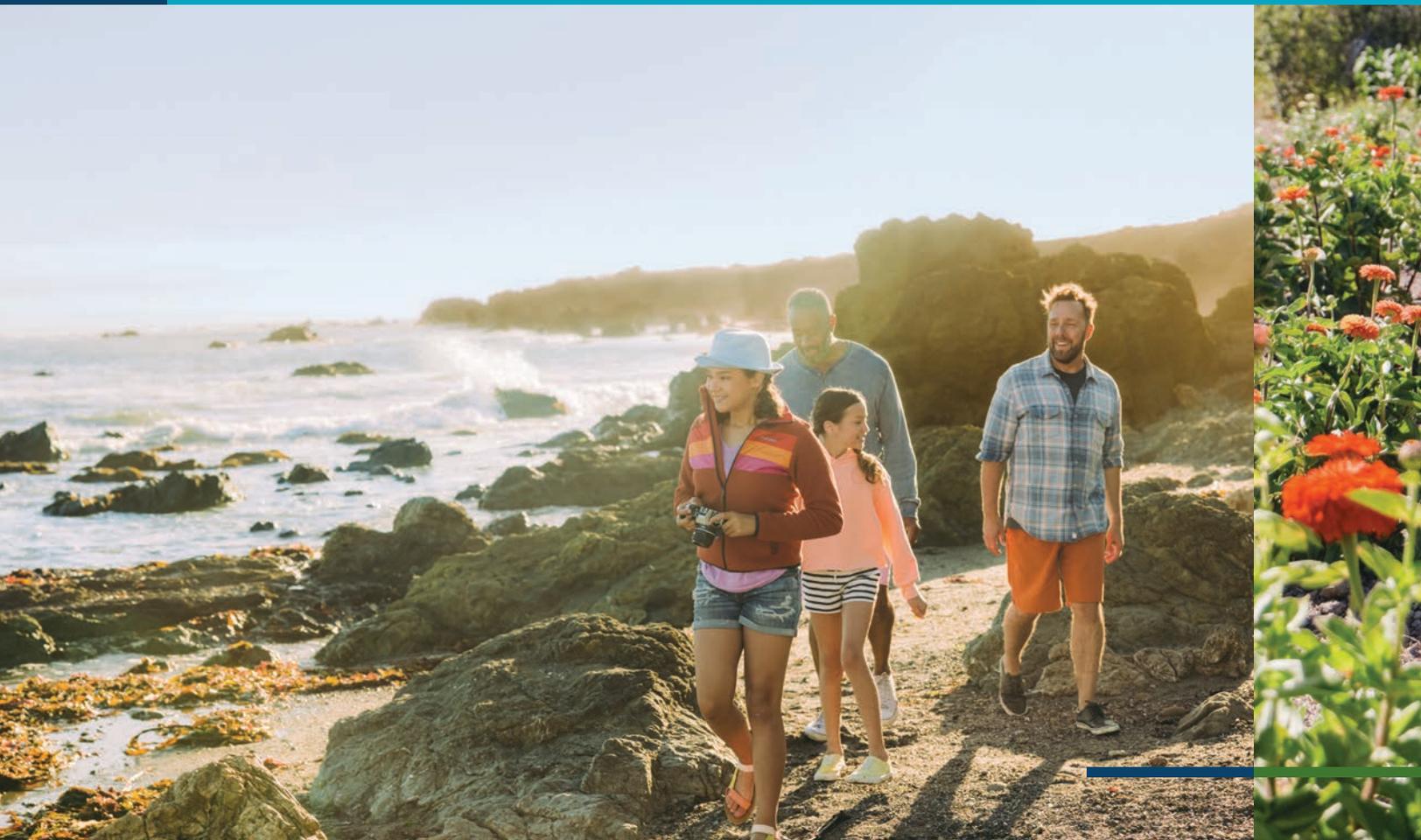


	2022	2023
Economic Contribution to SLO CAL	\$451 per ad dollar spent	\$364 per ad dollar spent
Incremental Contribution for Visit SLO CAL	\$2.19 per ad dollar spent	\$1.91 per ad dollar spent

**RETURN
ON
AD SPEND**



THE NEXT CHAPTER OF THE SLO CAL BRAND STORYTELLING





ETHNOGRAPHIC RESEARCH

To refine and enhance its brand storytelling, Visit SLO CAL (VSC) conducted in-depth ethnographic research to better understand how the destination delivers on its promise of helping visitors “live vividly.” Through on-the-ground interviews with visitors across the region, emotional responses, motivations and perceptions of the SLO CAL experience were explored. This research included a mix of age, gender and ethnicity, as well as trip make-up (i.e., couples, families, friends, solo travelers).

TIMELINE OF RESEARCH

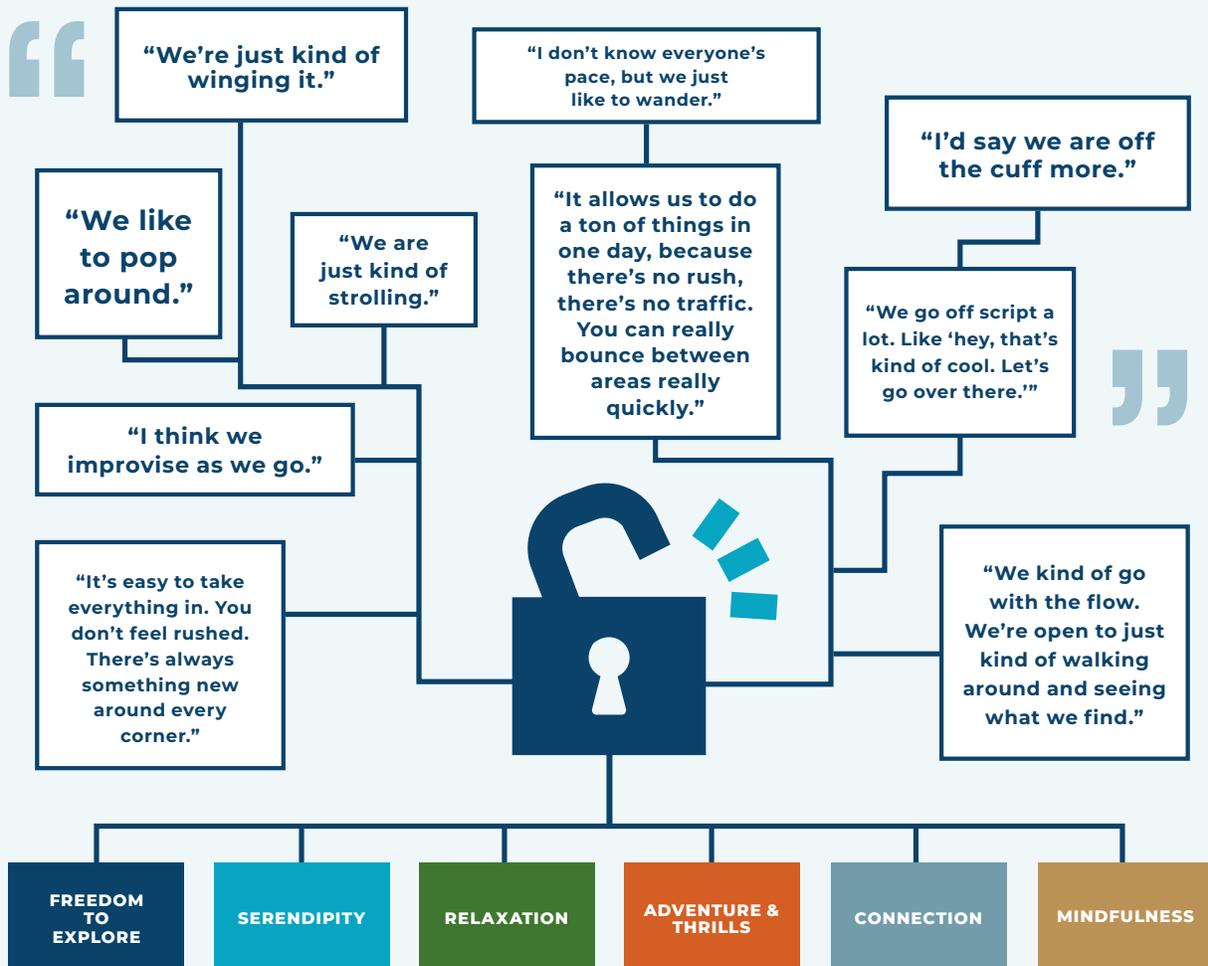


LIFE’S TOO BEAUTIFUL TO RUSH® POSITIONING CONFIRMED (AGAIN)

The research reaffirmed that SLO CAL offers a distinct sense of pace—a slower, more intentional way of living that stands apart from the hustle and bustle found in other California destinations. Visitors repeatedly expressed how this unhurried atmosphere fosters relaxation, mindfulness and genuine connection with the surroundings and locals. The phrase Life’s Too Beautiful to Rush® remains a resonant reflection of this sentiment.

THE SLO CAL DIFFERENCE

Unlike the swifter pace of urban California destinations, SLO CAL offers a refreshing alternative. Visitors interviewed described the region as a place to pause, breathe and fully engage with the moment. This unique change of pace unlocks opportunities for spontaneity and unstructured exploration, with travelers often choosing to “go with the flow,” embracing unplanned and impromptu experiences. This unique freedom to explore contributes to a more memorable travel experience.



THE SLO CAL PACE

In a travel experience, “pace” can unlock a range of benefits: freedom to explore, serendipity, relaxation, adventure & thrills, connection and mindfulness.

The unique pace of life in SLO CAL fuels a unique style of exploration. It defines how one physically moves through the destination (stroll, wander, flow, cruise, ease, pop, bounce) and their mindset (on the fly, off script, improvising, going with the flow).

Visitors reported feeling comfortable exploring without strict itineraries, often discovering hidden gems and enjoying serendipitous moments. This spontaneous mindset not only adds joy and excitement to their journeys but also reinforces the region’s identity as a destination for adventure and authentic discovery.

AUTHENTIC CONNECTIONS WITH LOCALS

Another standout theme from the research was the welcoming local community. Visitors appreciated the genuine conversations and recommendations offered by locals, enhancing their sense of connection and belonging. This sense of hospitality and pride further differentiates SLO CAL, creating lasting impressions for travelers.

“IT’S LIKE YOU’RE IMMEDIATELY WELCOMED INTO THE COMMUNITY AND THERE’S NO GATEKEEPING. IT FEELS LIKE ‘WE SUPPORT EACH OTHER...WE’RE ALL LOCAL.’”

“AND THE PEOPLE HERE LOOK AT YOU AND ACTUALLY HAVE A CONVERSATION.”

“THEY’RE ARTISANS TAKING PRIDE IN WHAT THEY DO. THEY’LL SAY, ‘WHEN YOU GO TO THE NEXT TOWN OVER, I KNOW THESE GUYS THERE. GO CHECK OUT THEIR SHOP.’ THEY’RE NOT HOARDING IT TO THEMSELVES.”



STRATEGIC INSIGHT: SLO CAL SPONTANEITY

The research revealed an important nuance to the destination experience, that SLO CAL's unique pace enables you to be spontaneous, giving you the freedom to go off script and embrace the unexpected.

With this learning, the SLO CAL brand architecture has been refined. While SLO CAL continues to be a place where Life's Too Beautiful to Rush®, visitors feel a sense of freedom and spontaneity that is seen as unique to the region. VSC will harness this insight moving forward showcasing authentic moments of discovery and connection and inviting would-be visitors to experience the joy to be found going "off script."

"Spontaneity can be its own reward, like an amateur artist throwing paint at a canvas for fun, regardless of what's produced."

— TIME 2024



SLO CAL BRAND ARCHITECTURE

Brand Purpose

The action we carry out
in everything we do

To live in the moment

Brand Promise

What SLO CAL delivers to visitors

Life's Too Beautiful to Rush®

Emotional Benefit

How visitors feel as an outcome
of their SLO CAL experience

A sense of freedom
and spontaneity

Functional Benefit

SLO CAL's natural advantages

People + Place + Pace
Small town charm meets
big-time natural beauty
with a unique pace

Brand Personality

Qualities SLO CAL embodies &
expresses in all communications

Friendly, open-minded,
down-to-earth, genuine



SLO CAL BRAND CAMPAIGN

New for FY 26

“The Land of...” Hero and House of Brands campaign assets connected with consumers, achieving a near-perfect ad favorability rating (96%) and effectively communicating the SLO CAL experience. In the next iteration of creative, VSC will continue to reflect the region’s promise that Life’s Too Beautiful to Rush® and stay grounded in authentic connections with nature (place) and locals (people) while infusing fresh energy into the storytelling through a sense of adventure, discovery, playfulness and fun that unfolds organically.

This evolution strategically ladders to California as “The Ultimate Playground,” creating greater synergy with VSC and Visit California marketing messages.

Visit SLO CAL’s new brand campaign concept is planned for production in fall 2025 with debut in early 2026. Qualitative focus groups were conducted in April to explore conceptual directions. This research validated the appeal

of messaging around spontaneity and detours, while also validating that travelers plan and book key parts of their vacation prior to travel including hotels and some restaurants, excursions and events. Participants were drawn to the unique pace of SLO CAL, ease of interaction with locals and ability to go off script and discover something new.

Like the initial brand campaign, the new iteration will feature both Hero and House of Brands assets, with VSC working closely with its destination partners to showcase a range of experiences across the region.

Similar to the “Unpacking SLO CAL” content series, the new campaign will lean into the joy that comes with embracing the unknown and being spontaneous.

CAMPAIGN CONCEPT

SLO CAL is a haven for travelers who deliberately seek out the unexpected. With its unspoiled natural beauty, winding roads, countless trails, tucked-away towns and hidden gems, there are endless opportunities to turn a detour into your next great travel story.

Showcasing the relaxed pace and unique flow of SLO CAL, the campaign will capture the unplanned, unscripted and completely unforgettable experiences awaiting visitors, from coastal drives to sandy beaches, hidden coves to rolling vineyards and charming towns to iconic landmarks and everything in between.



Ever had a trip where the best part is the part you didn't plan? Here in The Land of SLO CAL, it's an everyday occurrence.

The breathtaking views alone call you to wander. An unexpected turn leads to unspoiled beaches, tucked-away towns, and hidden hot spots.

Sure, sticking to the plan is still going to uncover plenty of surprises.

But why not wing it? Let spontaneity take the steering wheel. And let your whims do the wayfinding. Odds are you're going to like what they find.

Maps might have the most direct way to go, but if you're up for getting happily sidetracked, any local's going to offer reliable directions.

Sure, this kind of up-for-anything, free-flowing mindset might feel like a bit of a detour from what you're used to...But if you're open to adventure, and ready to go wherever the journey leads, we'd like to welcome you, to SLO CAL.

FY 26 INTEGRATED PROGRAM OF WORK

The FY 26 program of work has been planned with an eye toward the challenges and opportunities in front of us. With more than 30% lodging inventory increases planned over the next four years, the continued closure of Highway 1 north of Ragged Point and the geopolitical reality of uncertainty, there will be significant headwinds to navigate. With those factors in mind, the budget and program plan allow for flexibility and maximizing opportunity to continue to establish SLO CAL as a place where Life's Too Beautiful to Rush®, inviting visitors to take time out, relax and enjoy all the region has to offer.

In FY 26, Visit SLO CAL (VSC) will approach its annual integrated program of work in two halves. The first half (1H) of the new fiscal year will continue to leverage “*The Land of...*” Hero brand and House of Brands assets as the foundation for paid media, with continued distribution of more immersive storytelling assets including “*Unpacking SLO CAL*” and “*Wine-O-One*” which were introduced last fiscal year.

These existing campaigns will continue to be executed using an omnichannel strategy across paid, owned and earned channels in 1H.

Looking ahead, “*The Land of...*” campaign will be replaced with a new brand campaign that embraces spontaneity as a point of differentiation and appeal. Launching in the second half (2H) of FY 26, Hero and House of Brands assets will invite travelers to experience SLO CAL, where Life's Too Beautiful to Rush® and going with the flow leads to a new discovery around every corner.

In addition, VSC will be developing two new content series called “*Where the Music Takes You*” and “*Tapped into SLO CAL*”.



PEOPLE + PLACE + PACE

SLO CAL BRAND STORYTELLING
FOUNDATIONAL CAMPAIGNS



SLO CAL BRAND STORYTELLING
FOUNDATIONAL MESSAGING PILLARS

“WHERE THE MUSIC TAKES YOU”

As SLO CAL continues to promote its reputation as a destination rich in natural beauty and unforgettable experiences, there is an opportunity to further elevate a key dimension: the vibrant and varied cultural scene that runs through its communities. “*Where the Music Takes You*” will shine a brighter spotlight on the creative spirit of the region through a dedicated content focus that celebrates local artists, performers, venues and events.

Given the galleries to mural-lined streets and intimate music venues and festivals in the region, this new approach will help uncover the unique ways SLO CAL’s communities come together through culture. It will bring depth and diversity to VSC’s owned storytelling and expand the breadth of content across all channels, supporting a vertical that is both culturally rich and of keen interest to prospective travelers.

Importantly, this series will also highlight the destination’s growing nightlife and live music scene, a natural driver for overnight stays. By framing SLO CAL as a place where creativity flows after dark and cultural expression thrives year-round, first-time visitors and locals will see the region in a new light. It’s about highlighting another layer of what makes SLO CAL spontaneous, soulful and such an aspirational destination.





"TAPPED INTO SLO CAL"

As part of the updated SLO CAL Nomenclature strategy, a new content series that will speak straight to our senses and our community is being developed. *"Tapped Into SLO CAL"* will invite either a local maker, brewer, chef or creative to challenge themselves to distill the essence of SLO CAL into something tangible: a set of flavors. Whether it's a drink, a dish, a scent or something entirely unexpected, each episode will explore how the spirit of the region can be captured and shared and, indeed, whether it's even possible to define SLO CAL in just one way.

This series is designed to spark conversation across the county. What does SLO CAL taste like? Smell like? Feel like? Through this exploration, we'll bring together the people who know it best, residents, to help shape a collective understanding of what makes this place so special. *"Tapped into SLO CAL"* is about celebrating the diversity of SLO CAL's distinct communities, the richness of the landscape and the spontaneity of experience that SLO CAL invites, and, in doing so, deepens the meaning behind the name 'SLO CAL' not just as a destination, but as a shared identity.

INTEGRATED MARKETING OBJECTIVES

OBJECTIVE	
Amplify and steward the SLO CAL brand through unified efforts	
STRATEGY	KEY RESULTS
<p>Continue to build on House of Brands marketing strategy</p>	<ul style="list-style-type: none"> • Create and share eight paid partner participation opportunities to collaborate on VSC marketing efforts by September 30, 2025 • Develop and deploy a Digital Asset Management system (DAM) by January 31, 2026 • Produce and launch new paid SLO CAL brand campaign by February 28, 2026 • Establish partner toolkits for brand campaign and other marketing programs by program launch dates
<p>Increase share of voice through integrated storytelling efforts</p>	<ul style="list-style-type: none"> • Align storytelling across social, earned and owned channels through quarterly coordination by August 31, 2025 • Develop and deploy a new resource on the website for trip planning by December 31, 2025 • Enhance the comprehensive email marketing strategy to further optimize user engagement by using quality content by March 31, 2026 • Develop and deploy a social-first content campaign designed to support, enhance and extend the reach of the brand platform through social and earned channels by June 30, 2026 • Secure 175 domestic and international articles in alignment with brand objectives and SLO CAL nomenclature by June 30, 2026 • Develop and implement a strategy for extending and repurposing existing assets through refreshed content series by June 30, 2026
<p>Increase local adoption of SLO CAL nomenclature</p>	<ul style="list-style-type: none"> • Update and execute second phase nomenclature strategy by March 31, 2026 • Leverage three local partnerships to expand nomenclature awareness by June 30, 2026 • Amplify SLO CAL Nomenclature through presence at two signature events by June 30, 2026 • Cultivate partnerships for three SLO CAL labeled products by June 30, 2026

OBJECTIVE

Demonstrate value to investors, partners, stakeholders and communities

STRATEGY

KEY RESULTS

Build awareness and deepen engagement of investors, partners and stakeholders

- Achieve a 3% year-over-year increase in investor, partner and stakeholder engagement by June 30, 2026
- Execute three research program opportunities for partner inclusion by June 30, 2026
- Execute the comprehensive sales strategy through travel trade and meetings business segments to drive midweek business by June 30, 2026

Build local understanding of positive impact tourism has on community

- Launch SLO CAL Welcome 2.0 by July 1, 2025
- Support six local events through the quarterly In-Kind Event Sponsorship program
- Coordinate and participate in three relevant working groups and taskforce meetings by June 30, 2026, to advance the advocacy of issues important to the tourism industry
- Secure 50 local media stories to promote positive impacts of tourism by June 30, 2026

Advance efforts to educate, inform and collaborate with our investors, partners and stakeholders

- Produce the annual SLO CAL Summit event by November 30, 2025
- Facilitate four "SLO CAL Crafted" workshops to connect and inform local makers
- Execute bi-annual social summit to educate and collaborate with countywide creators
- Host a quarterly meeting with hotel sales professionals to identify new pathways to increase midweek business
- Conduct annual lodging forecast to inform budget and direction by January 31, 2026





FY 26 PAID MEDIA





In FY 26 Visit SLO CAL (VSC)'s paid media plan will apply historical learning while continuing to focus on applied data sets to reach the core target audience, in key markets, with the greatest opportunity to drive awareness and visitation.

The paid media approach will consider the complexity of the landscape, trends in time spent across generations and technology as an efficacy enhancement where available and lean into channels with the ability to deliver impact and new program elements to foster deeper connection with prospective travelers.

PRIMARY TARGET AUDIENCE

The 'Purposeful Traveler' was defined in FY 22. This audience has proven not only to epitomize the SLO CAL brand but has also been incredibly receptive to messaging reflected in strong paid media engagement and ad tracking studies. Learning into key psychographic and demographic traits of this bespoke target will allow VSC to customize messages to drive greater engagement.

THE PURPOSEFUL TRAVELER

Creativity & Simplicity: Mindset

56%

13.1M

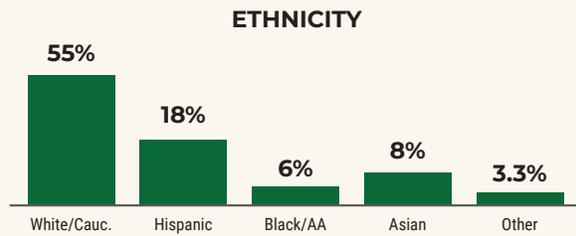
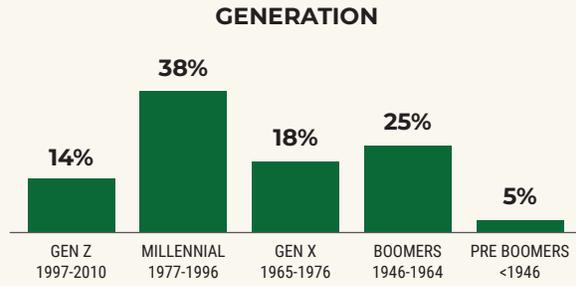
CALIFORNIA

The 'Purposeful Traveler' is curious, creative and open-minded, wanting to explore and learn about new things and seek stimulating experiences. They are in tune with nature and themselves, doing things because they like them and get enjoyment from them while also helping to preserve the environment and positively influence the betterment of society. Authenticity and being true to oneself while maintaining strong personal relationships with family and friends is particularly important.



THE PURPOSEFUL TRAVELER: DEMOGRAPHICS

-  **47% MALE 53% FEMALE**
-  **56% MARRIED 29% SINGLE**
-  **34% CHILDREN IN HOUSEHOLD**
-  **34% GRADUATED COLLEGE**
-  **\$142.5K HOUSEHOLD INCOME**
-  **47.4 AVERAGE AGE**



Source: MRI-SIMMONS FALL 2024 Doublebase: California Traveler Base

THE PURPOSEFUL TRAVELER: TRAVEL PROFILE

ROUND TRIPS

Number of Trips	Percentage
1	23%
2	24%
3	24%
4+	29%

NIGHTS AWAY VACATION

Nights	Percentage
1-2	25%
3-6	48%
7-14	20%
15+	5%

TRAVEL PARTY ANY TRIP

Party Size	Percentage
1	40%
2	43%
3	12%
4	9%
5+	3%

TRAVEL WITH LAST TRIP

Travel With	Percentage
ALONE	29%
SPOUSE/MATE	54%
CHILDREN	22%
FRIENDS	11%
OTHER	11%

MILES TRAVELED LAST TRIP

Miles	Percentage
<500	29%
500-999	27%
1,000+	41%

MEANS OF TRAVEL ANY TRIP

Means of Travel	Percentage
FLY	62%
DRIVE	56%
RENTAL CAR	17%

ANNUAL TRIP SPENDING

Spending	Percentage
<\$2K	34%
\$2-\$5K	23%
\$5K+	15%

\$1,497
AVG. ANNUAL TRIP SPENDING

TRIP ACTIVITIES ANY TRIP

Activity	Percentage
GO TO BEACH	36%
FINE DINING	27%
ATTEND EVENT	24%
VISIT NAT'L PARK	20%
CULTURAL/HISTORICAL SITE	18%
MUSEUM	18%
BACKPACKING/HIKING	17%
SIGHTSEEING TOUR	17%
OUTDOOR SPORTS/RECREATION	12%

ACCOMMODATIONS ANY TRIP

Accommodation	Percentage
ECONOMY	9%
MIDSCALE	17%
UPPER MIDSCALE	21%
UPSCALE	18%
UPPER UPSCALE	27%
LUXURY	3%
RENTAL SERVICE	28%
HOTEL/MOTEL	55%

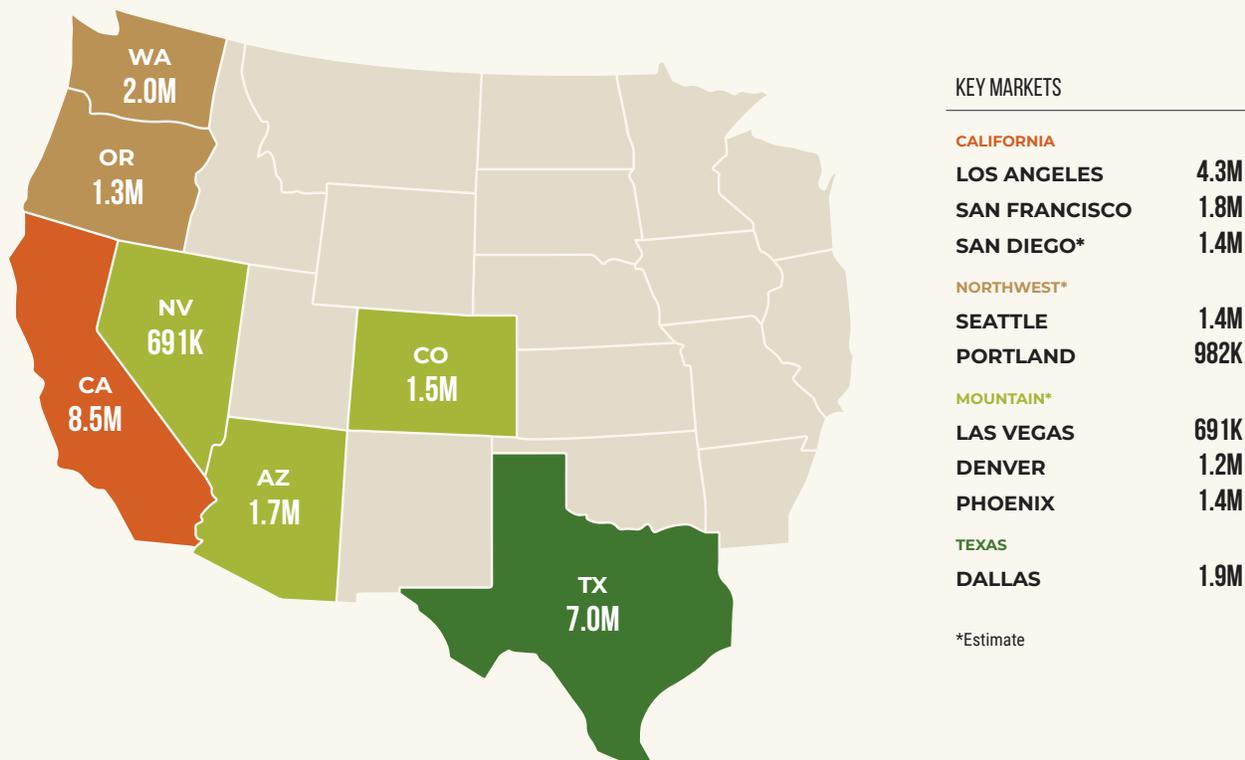
With nearly 54% of 'Purposeful Travelers' between the ages of 25 and 54, emphasis will be placed on reaching this demographic in the coming year. This target age group has an average household income of \$155K compared to the 55+ demographic at \$136K, indicating slightly greater spending power and the potential to be more resilient should economic headwinds be realized.

It should be noted that while the focus will be slightly younger, select opportunities to keep SLO CAL in the minds of older Generation X and Boomers will be incorporated.

The 'Purposeful Traveler' takes multiple trips per year, with one third embarking on four or more adventures in a 12-month period. Their means of travel vary by trip and data indicates there is a strong balance of jet setting (62% air travel) and road tripping (73% vehicle travel) making both fly and drive markets important to the plan.

'Purposeful Travelers' are concentrated in the West with 14.2M across California, Oregon, Washington, Nevada and Arizona. Most of the target lives in the major markets in each state. When expanding to Colorado and Texas, the pool increases by nearly 20%.

THE PURPOSEFUL TRAVELER: POPULATIONS



SECONDARY TARGET AUDIENCE

FAMILIES

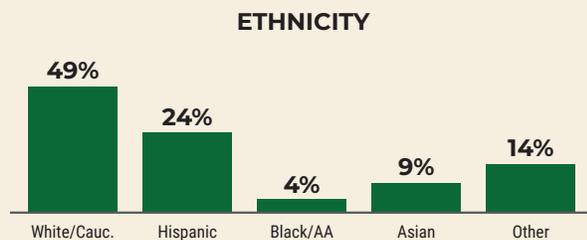
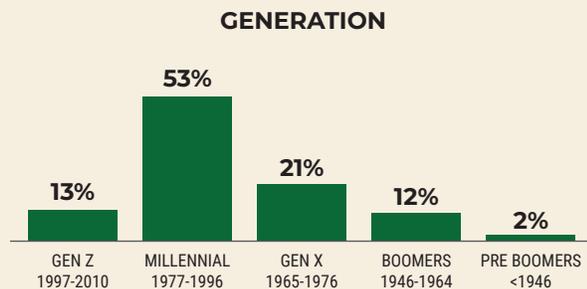
The Purposeful Traveler & Travel With Children

15% **3.4M**
CALIFORNIA

'Purposeful Traveler' Families are largely Millennial families and 59% have children in the household. Due to party size, their trip spending is nearly 25% higher. Whereas the majority of 'Purposeful Travelers' come from further away (1,000+ miles), families are more apt to travel shorter distances (500-999 miles).

THE PURPOSEFUL TRAVELER FAMILIES: DEMOGRAPHICS

-  **47% MALE 53% FEMALE**
-  **62% MARRIED 27% SINGLE**
-  **59% CHILDREN IN HOUSEHOLD**
-  **47% GRADUATED COLLEGE**
-  **\$155.3K HOUSEHOLD INCOME**
-  **42.3 AVERAGE AGE**



Source: MRI-SIMMONS FALL 2024 Doublebase: California Traveler Base

GEOGRAPHY

Visit SLO CAL (VSC) will continue to prioritize geographic markets using a tiered system. To strengthen its presence in select markets, the focus for FY 26 will be on markets with the greatest openness to visiting California. Tiers will be prioritized based on past visitation, familiarity with the destination and consideration to visit, balanced with load factor and changes to air service. Market tiers will remain consistent to FY 25 with the ability to optimize based on changes in visitation and/or air service.

TIER 1 MARKETS	TIER 2 MARKETS	TIER 3 MARKETS
Core drive or fly markets responsible for driving the "lion's share" of visitation	Markets with good visitation, prioritized for share of air arrivals	Less mature markets that have seen growth and have potential as awareness and familiarity increases

FY 25 SLO CAL ARRIVALS BY ORIGIN MARKET					
PRIORITY	DESIGNATED MARKET AREA	% OF TOTAL ARRIVALS	% OF AIR ARRIVALS	% OF BUDGET	YOY BUDGET ADJUSTMENT
TIER 1	Los Angeles, CA	83%	4.20%	25%	+9%
	San Francisco/Oakland/San Jose, CA		4.80%	11.5%	+15%
	Sacramento/Stockton/Modesto, CA		N/A	7.0%	+14%
	San Diego, CA		9.10%	10.5%	+17%
TIER 2	Phoenix, AZ	2.20%	10.70%	9.0%	-10%
	Seattle/Tacoma, WA	1.00%	9.20%	7.2%	-5%
	Portland, OR	0.90%	5.80%	5.4%	-5%
TIER 3	Denver, CO	0.90%	5.20%	6.8%	-15%
	Dallas/Fort Worth, TX	1.50%	2.90%	12.5%	-22%
	Las Vegas, NV	1.80%	2.60%	5.1%	-15%

Source: Arrivals data sourced from Symphony. Spending for these markets will be adjusted based on opportunity and capacity.

Geography (continued)

Market priorities will be fluid to account for potential economic headwinds facing the U.S. with 55% of the budget focused on core drive/fly markets within California which accounted for 83% of 2024 visitation to SLO CAL. The greatest opportunity volume of 'Purposeful Travelers' resides in California's four largest markets (Los Angeles, San Francisco, San Diego and Sacramento).

Fly markets remain important, and air arrivals have been incredibly strong throughout 2024. Dedicated efforts in these markets were prioritized over the past year and proved beneficial as all markets increased their overall share of visitation. With pending economic uncertainty, the initial FY 26 media plan will dial the focus on fly markets back slightly to maintenance levels, affording more support in regions that have greater potential.



FY 26 PAID MEDIA OBJECTIVES & STRATEGIES

FY 26 PAID MEDIA OBJECTIVES

- Continue to drive awareness of the SLO CAL brand
- Foster consideration and drive engagement with SLO CAL brand content
- Provide air service support by generating awareness of routes in key fly markets while driving demand for visitation

FY 26 PAID MEDIA STRATEGIES

- Explore new opportunities to connect with the 'Purposeful Traveler,' leaning into Millennials
- Maximize efficiencies by partnering with publishers with the ability to effectively reach Millennials while still maintaining exposure among older generations
- Lean into awareness channels in fly markets, keeping a layer of activity to maintain SLO CAL presence while focusing on moving more drive market prospects to consideration and intent
- Maintain a layered media approach to reach 'Purposeful Travelers' across a diverse mix of media channels
- Weight media spending towards the second half of FY 26 to support launch of the new brand campaign, inclusive of an always-on layer and heavy-up flights to drive off peak visitation

FY 26 PAID MEDIA MIX & BUDGET ALLOCATION



The FY 26 media mix will meet 'Purposeful Travelers' where they are based on evolving media usage trends. Current campaign performance intelligence will drive partnerships across a range of awareness-driving channels with opportunities for robust and highly engaging tactics. Video will receive the greatest budget allocation to continue to build familiarity while driving brand preference. This multifaceted paid media program will optimally deliver on the campaign objectives and strategies, and as new data is collected, the media mix will be optimized according to real-time Key Performance Indicators (KPIs).

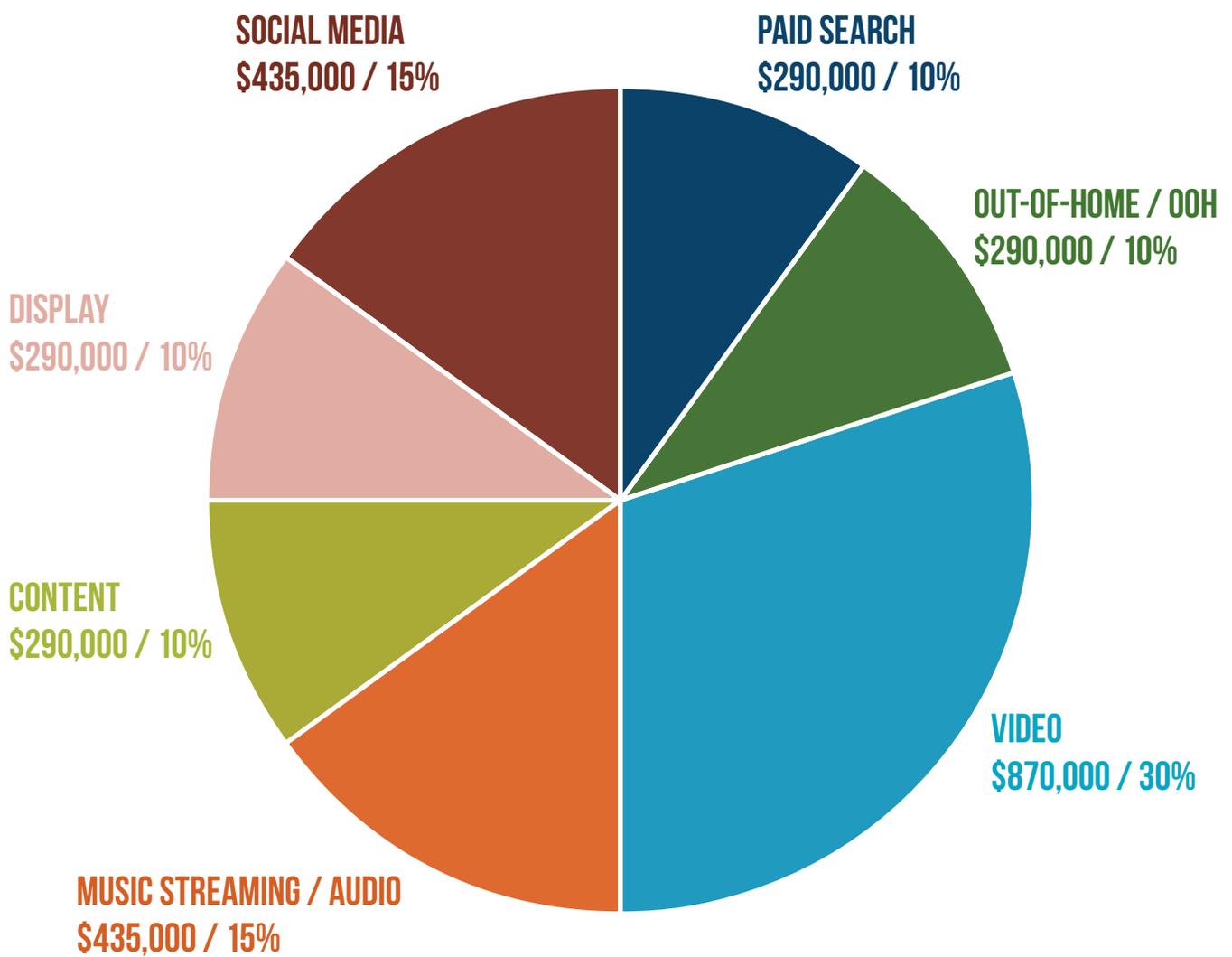
FY 25 PAID MEDIA ENGAGEMENT



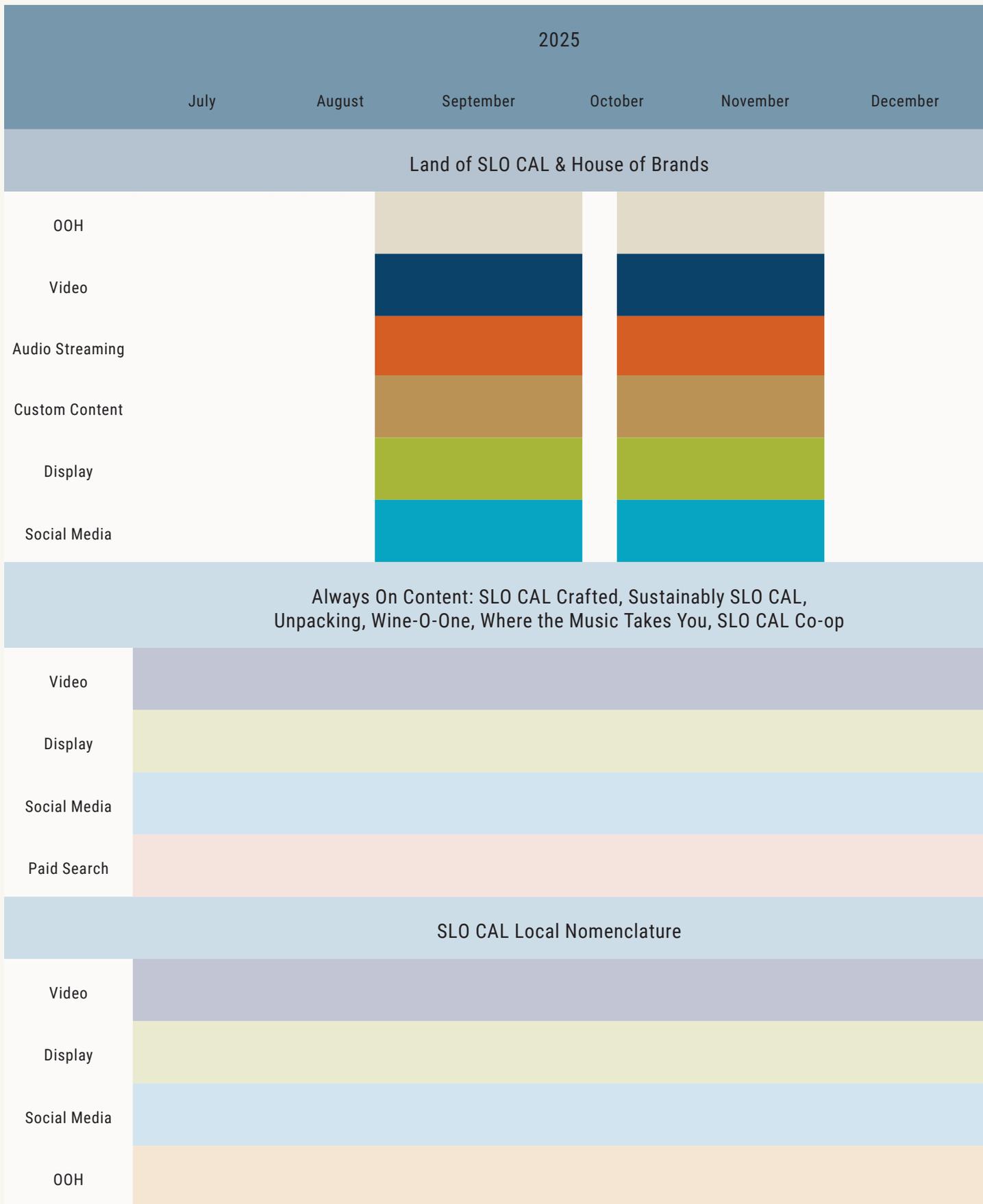
Campaign performance July 1, 2024 through March 30, 2025



FY 26 PAID MEDIA BUDGET: \$2,900,000



FY 26 PAID MEDIA FLIGHTING



Note: Brighter color bars indicate additional media spend

2026

January

February

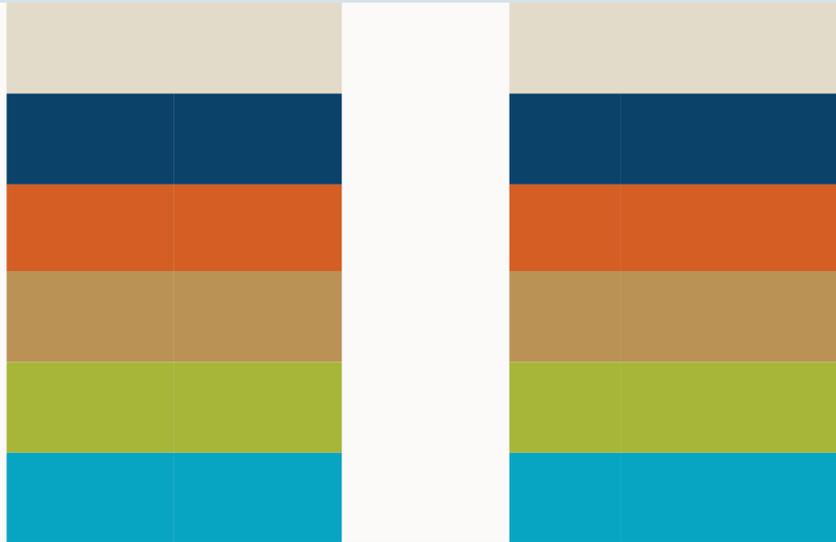
March

April

May

June

New Hero & House of Brands Campaign

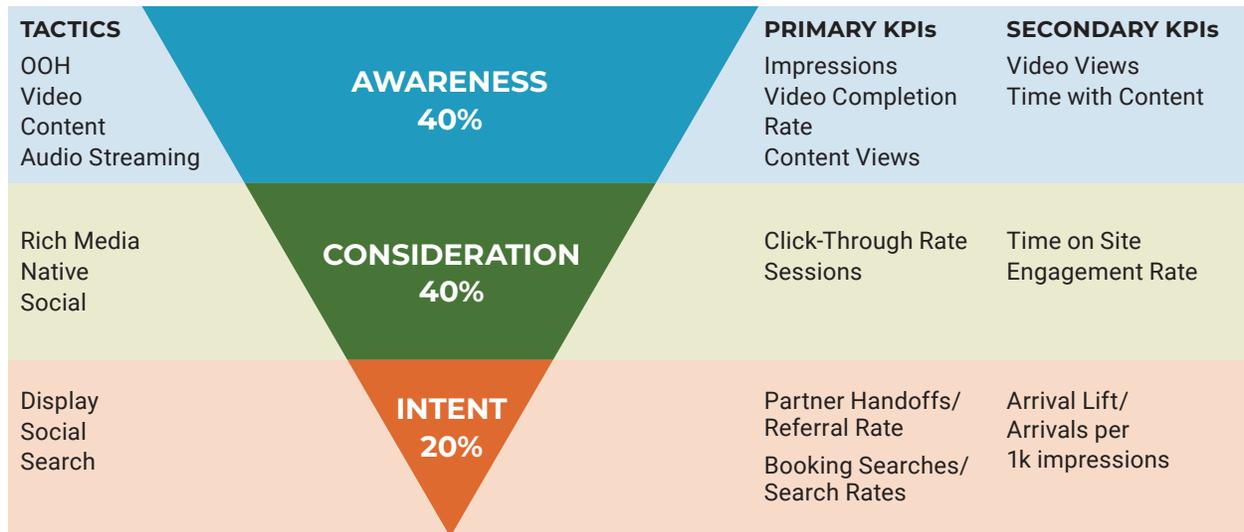


Always On Content: SLO CAL Crafted, Sustainably SLO CAL, Unpacking, Wine-O-One, Where the Music Takes You, SLO CAL Co-op

SLO CAL Local Nomenclature

FY 26 PAID MEDIA MEASUREMENT

Each component of the paid media plan has a specific purpose and will be measured and optimized according to clearly defined KPIs.



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

The various methods of measurement noted will provide insight into audience interest and engagement with a direct correlation to media placements.







OWNED MEDIA



Visit SLO CAL (VSC) is set to optimize its owned media channels, such as its website, social media, email marketing and Customer Relationship Management (CRM) systems, aiming to maximize reach among potential travelers. This strategic enhancement seeks to deepen engagement, strengthen partner support and elevate SLO CAL's status as a top travel destination. By focusing on measurable improvements, the strategy intends to promote cross-visitation and showcase the region's diversity, catering to the varied interests of travelers.

WEBSITE

OBJECTIVES

Identify opportunities for website development

Deploy optimization tactics to enhance user experience and content on slocal.com

Increase share of voice through integrated storytelling efforts on slocal.com

STRATEGIES

- Begin strategic planning for the next iteration of slocal.com
- Integrate advanced interactive mapping tools to improve utility and trip planning functionality
- Provide additional functionality for the distribution of media assets
- Enhance content and improve the user journey on slocal.com to better support visitor trip planning and engagement
- Continuously monitor and optimize high-potential content to improve search rankings and surface new opportunities for growth
- Integrate new brand campaign throughout slocal.com
- Elevate unique SLO CAL narratives—such as sustainability and wine—through expanded content and enhanced storytelling approaches

KEY RESULTS

- Launch enhanced interactive mapping functionality on slocal.com by December 31, 2025
- Develop and deploy a digital asset management (DAM) system by January 31, 2026
- Complete website evaluation and action plan by March 31, 2026
- Boost website-originated partnership referrals by 5%, directing more visitors to local partners' sites, by June 30, 2026
- Increase overall organic sessions to slocal.com by 3% year-over-year by June 30, 2026
- Launch three new or updated landing pages promoting key SLO CAL stories by June 30, 2026

OWNED MEDIA Continued

SOCIAL MEDIA

OBJECTIVES

Develop processes and procedures to improve integration of social media into broader marketing efforts for both internal and partner teams

Align the social strategy with new brand approach to amplify the new brand campaign narrative through social tactics and messaging

Increase the visibility of the SLO CAL region through a mix of “always-on” and campaign-driven content, prioritizing quality over quantity and ensure strategic messaging fosters deeper engagement with the SLO CAL brand and highlights the region as welcoming to all audiences

Create and implement new partnerships strategy to ensure equitable representation of partners through collaborative posting and content development

STRATEGIES

- Develop brand aligned content hooks and social-first styles that maintain strong messaging while engaging viewers for longer viewership and wider reach
- Integrate the new Digital Asset Management (DAM) system into social content development processes
- Launch a “social summit” program to bring partners together, aligns strategies and inspire collaborative content opportunities
- Upskill interns and cross-train internal team members to build confidence in social content editing, brand messaging and tactical execution on social platforms

KEY RESULTS

- Maintain consistent posting cadence of 16-18 posts monthly across all core platforms, increasing ratio of campaign content to “always-on” and support the new brand launch
- Transition social messaging to include new brand messaging with eight dedicated posts and assets going live before June 30, 2026
- Engage and host two influencers, aligning the narratives with Visit SLO CAL’s (VSC) and ensuring content created reflects the brand evolution by June 30, 2026
- Increase partner collaborations by launching the dedicated partnership strategy and presenting two social collaborations invitations each month

EMAIL MARKETING

OBJECTIVES

Enhance the comprehensive email marketing strategy to further optimize user engagement by using quality content

Continue to grow the email subscriber base with high-quality engaged users interested in SLO CAL

STRATEGIES

- Utilize strategic insights from previous performance data, focusing on deeper personalization and content refinement
- Expand segmentation based on new behavioral data, campaign interactions and subscriber interests to deliver more relevant content
- Refine and expand automated journeys across key user touchpoints, including post-subscription, trip planning and re-engagement phases
- Optimize newsletter sign-up touchpoints across owned media channels to strengthen conversion and engagement
- Drive subscriber growth through compelling lead-generation campaigns and strategic list-building opportunities

KEY RESULTS

- Implement the strategy enhancements that drive measurable conversions from email marketing efforts by March 31, 2026
- Achieve a 6% year-over-year increase in click-through rate on content featured in email by June 30, 2026
- Increase newsletter sign-ups by 4% year-over-year by June 30, 2026





EARNED MEDIA



Visit SLO CAL (VSC) manages external communications and media relations in collaboration with its PR and Social Media agencies, as well as Visit California. Earned Media efforts focus on securing third-party endorsements through partnerships with destination partners to attract top-tier journalists, influencers and content creators. By emphasizing diversity and inclusivity, VSC highlights SLO CAL's unique charm and expands global awareness through curated media and influencer FAM trips and engagement, in alignment with paid and owned media strategies.

OBJECTIVES

Increase regional, domestic and international earned media coverage to elevate the SLO CAL brand

Establish SLO CAL as a top-tier tourism destination through strategic earned media storytelling

Demonstrate the impact of earned media efforts with investors, partners and stakeholders

STRATEGIES

- Align owned, paid and earned media efforts to integrate storytelling strategy domestically and internationally
- Share compelling narratives that demonstrate how tourism drives community growth, supports local businesses and enhances resident quality of life
- Increase visitation and length of stay in SLO CAL by enhancing efforts in domestic and international direct drive/fly markets, including the UK and Ireland, to boost global awareness of SLO CAL
- Offer destination partners collaborative opportunities, networking events and educational sessions to foster engagement and knowledge sharing

KEY RESULTS

- Develop an integrated media plan to drive earned media placements and brand recognition by June 30, 2026.
- Secure 50 local media stories highlighting tourism's positive impacts and reinforcing the SLO CAL brand by June 30, 2026
- Secure 10 individual domestic traditional media and two international social media influencer FAM trips, plus one international group FAM trip, each covering two or more destinations with a minimum three day stay in market by June 30, 2026
- Host four PR and social media mixers and two media co-op initiatives to strengthen partner relationships and collaboration by June 30, 2026



PARTNERSHIPS & EVENTS



Visit SLO CAL (VSC) continues to achieve success through strong partner networking and programming. By fostering relationships and enhancing collaboration, VSC is positioned to expand and evolve key initiatives, like “SLO CAL Crafted” and In-Kind Sponsorship. Looking ahead the organization remains committed to building partnerships that strengthen the SLO CAL region. Through new and existing initiatives focused on community engagement, partnerships will continue to play a pivotal role in the SLO CAL ethos.

PARTNER ENGAGEMENT

OBJECTIVES

Create value for investors, partners and stakeholders through new collaboration opportunities and engagement initiatives

Strengthen partnerships to increase awareness of VSC resources and storytelling initiatives, building a united community committed to advancing the SLO CAL mission

STRATEGIES

- Leverage marketing initiatives to foster relationships and encourage participation in VSC’s partnership opportunities to demonstrate value to partners and raise awareness of the SLO CAL brand
- Expand and refine VSC’s partnership programs for supporting local events
- Develop an incubator for the “SLO CAL Crafted” program to provide resources and foster community-building opportunities for certified local businesses

KEY RESULTS

- Engage with 60 partners each quarter using the CRM partner benefit summary to demonstrate the value of VSC partnership opportunities by June 30, 2026
- Formalize In-Kind Event Sponsorship as an official program by July 1, 2025 and execute the sponsorships selected for FY 26 by June 30, 2026
- Plan and host quarterly “SLO CAL Crafted” mixer and workshop event series by June 30, 2026



SIGNATURE EVENTS

OBJECTIVES

Build awareness and support of SLO CAL as a sought-after event destination

Demonstrate value to investors, partners, stakeholders and communities through maximizing event opportunities

Steward the SLO CAL brand through event activation opportunities and local adoption of the SLO CAL nomenclature

STRATEGIES

- Provide value to industry investors, partners, stakeholders and communities through professional industry education and information opportunities
- Continue to implement the Events & Festival Strategy through cultivating partnerships that increase awareness of SLO CAL locally and beyond
- Amplify SLO CAL nomenclature through brand presence at community events

KEY RESULTS

- Produce the annual SLO CAL Summit event by November 30, 2025
- Successfully execute marketing and brand presence at SLO CAL Open and Spartan Race by March 1, 2026
- Exhibit at four SLO CAL supported community events by June 30, 2026
- Pair at least two existing events to promote collaboration and cross-community visitation by June 30, 2026





SALES



Visit SLO CAL (VSC) will continue to implement the adopted countywide sales strategy and to accelerate growth in the market. The strategy will continue to focus on building awareness of SLO CAL's product and will support operations to increase bookable products. Building and strengthening connections between tour operators and meeting planners will be a key priority to drive midweek business to help offset the growth in inventory.

VSC's proactive approach to build connections will include agent trainings, FAM tours, email drip campaigns, sales missions, attendance at key industry trade shows and more. By continuing to build awareness of SLO CAL's bookable products, VSC aims to streamline the decision-making process, making SLO CAL the destination of choice for tour operators and meeting planners.

Amid an ever-changing global political climate, maintaining a strong international presence remains essential to increase international visitation. VSC will continue its strategic efforts in the international market but utilizing its efforts in the UK and Ireland by leveraging its network of strategic partners such as Hills Balfour and Visit California.

SALES PARTNER ENGAGEMENT

OBJECTIVES

Strengthen engagement between VSC and its lodging investors, partners and stakeholders to amplify countywide sales efforts

Provide educational opportunities for lodging investors

Assist lodging investors with identifying and developing key partnerships to increase midweek business

Increase bookable product available through receptive tour operators and bed banks

STRATEGIES

- Engage with lodging investors, partners and stakeholders to identify regional, industry and property specific challenges, strengths and opportunities

KEY RESULTS

- Host a quarterly meeting with hotel sales professionals to collaborate on pathways to increase mid-week business by June 30, 2026
- Facilitate a minimum of two educational workshops for lodging investors and partners by December 31, 2025 and June 30, 2026



MEETING & CONFERENCE

OBJECTIVES

Generate qualified group sales leads

Increase awareness of the destination amongst meeting planners

**Position SLO CAL as an ideal destination
for meetings and conferences**

STRATEGIES

- Build and advance partnerships with meeting planners
- Pinpoint education and collaboration pathways for partners and meeting planners
- Identify key trade shows and conferences where VSC can engage as an exhibitor to increase lead generation

KEY RESULTS

- Develop and deploy new compelling content for a quarterly meeting planner email campaign by May 31, 2026
- Collaborate with lodging investors, partners and stakeholders to deliver a countywide meeting planner FAM by June 30, 2026
- Participation in a minimum of three meetings segment focused trade shows and events by June 30, 2026
- Generate 30 sales leads by June 30, 2026

TRAVEL TRADE

OBJECTIVES

Build and nurture relationships with international and domestic tour operators

Increase international visitation

Provide lodging investors and partners opportunities to engage with the travel trade

STRATEGIES

- Identify trade shows and events where VSC can showcase and increase exposure to key international markets
- Participate in a minimum of one Visit California co-op to engage with additional international target markets
- Leverage VSC's international representation agency Hills Balfour to grow the UK and Irish markets

KEY RESULTS

- Launch a VSC travel trade incentive strategy to encourage international bookings in the U.K. & Ireland and generate travel bookings from 10% of the unique qualified operators as identified in the FY 25 audit by June 30, 2026
- Host up to five product managers on a Reverse Sales Mission by November 30, 2025
- Work with marketing to develop new content for quarterly travel trade email campaign by June 30, 2026
- Attend a minimum of three travel trade industry shows or events and meet with over 100 operators by June 30, 2026, generating 15 qualified business leads





FILM SLO CAL

Film SLO CAL, acting as the San Luis Obispo County Film Commission, is dedicated to enhancing the SLO CAL region's appeal as a premier filming destination. Through marketing and promotion outside and inside the region, the commission seeks to build relationships that increase overall production.

OBJECTIVES

Enhance Film SLO CAL's digital infrastructure to improve accessibility and efficiency for filming professionals

Connect with filming professionals and increase awareness of SLO CAL as a premier California filming destination

Demonstrate the value of Film SLO CAL's work to local stakeholders, partners and the broader community

STRATEGIES

- Expand and improve digital tools such as the Film SLO CAL microsite, location galleries and inquiry workflows
- Participate in film and media industry events to foster relationships and build awareness among location scouts, producers and agencies
- Deliver in-market experiences that showcase SLO CAL's filming potential to key decision-makers
- Share success stories to promote SLO CAL's production-friendly reputation and filming opportunities

KEY RESULTS

- Enhance the Film SLO CAL microsite experience with updated location assets and resource content by April 30, 2026
- Deliver a location FAM tour for at least five film scouts, as well as an educational mixer for permitting partners alongside the SLO International Film Festival by April 30, 2026
- Share three produced videos with footage filmed in SLO CAL to the Film SLO CAL LinkedIn Page by June 30, 2026

EXPERIENCE SLO CAL 2050



Experience SLO CAL (ESC) 2050 is the destination management strategy focused on improving resident quality of life while fostering robust economic activity and sustainable regional stewardship.

As part of the Strategic Direction 2026, Visit SLO CAL (VSC) will continue advancing ESC 2050 initiatives, with a focus on Industry Advancement & Advocacy, Infrastructure & Investment and Experience Development.

ITEMS VISIT SLO CAL WILL ADVANCE IN FY 26

TALENT ATTRACTION, DEVELOPMENT & CAREERS

With input from the workforce development working group, VSC will facilitate the implementation of a “Regional Tourism Workforce Plan” to support countywide career opportunities and advancement. The plan will also include a marketing strategy for the updated version of the SLO CAL Welcome training.

COUNTYWIDE TRAIL SYSTEM

VSC will advocate for raising awareness of lesser-known trails by utilizing existing data on the countywide trail network. To promote these trails, VSC will develop a targeted storytelling strategy that encourages year-round exploration of these unique outdoor experiences.

SUSTAINABLE TOURISM

VSC will reinforce its commitment to sustainable tourism in FY 26 by developing a sustainable events toolkit, providing partners with resources to promote eco-conscious practices across the region.

ADVOCACY

Visit SLO CAL (VSC) advocates for a thriving, inclusive tourism industry by building strategic partnerships at the local and national levels. VSC champions policies supporting responsible development, workforce solutions and visitor infrastructure while ensuring SLO CAL remains a welcoming and accessible destination for all. Advocacy is crucial, now more than ever, to foster a sustainable future where tourism is a force for good, benefiting both visitors and residents.

OBJECTIVES

Advocate to legislators and transportation agency administrators about the importance of Highway 1 to the region and the need for a long-term proactive management strategy of the roadways

Advocate for countywide collaboration on innovative solutions to connecting travelers' last mile, from airport terminal to lodging

Position travel as an essential asset by leveraging major global events to highlight the benefits of international tourism and advocate for policies that reduce barriers to entry, enhance the visitor experience and strengthen SLO CAL's competitiveness as a destination

Work proactively with partners to identify legislative approaches that advance tourism

STRATEGIES

- Collaborate with partners and stakeholders to advocate for a long-term, proactive management strategy of Highway 1 and highlight its importance to the SLO CAL regional economy
- Educate investors, partners and stakeholders about the importance of last mile transportation and create opportunities for discussion and collaboration
- Develop an advocacy campaign highlighting the value of SLO CAL's tourism and its economic impact

KEY RESULTS

- Lead an advocacy campaign regarding Highway 1, resulting in at least three engagements with key decision-makers by April 30, 2026
- Work with stakeholders to create an implementation strategy for a last-mile pilot program that helps visitors travel between SBP and SLO CAL by January 30, 2026
- Secure at least three legislative endorsements, supporting tourism in SLO CAL, through legislative action or public comment, by June 30, 2026

ENGAGE WITH VISIT SLO CAL

SALES

Visit SLO CAL (VSC) provides opportunities for lodging investors and partners to build relationships and increase their exposure through participation in industry trade shows, sales missions, FAM tours and more. Contact the team at sales@slocal.com to learn more about ways to co-op.

TOUR & TRAVEL FAM TOURS

VSC organizes FAM tours, which are designed to educate travel trade professionals about the destination's unique selling points. FAM tours provide travel agencies with firsthand knowledge and experience of the destination, which enables them to create customized travel packages for their clients. VSC offers lodging investors and partners the chance to showcase their business to this exclusive audience by offering complimentary or discounted products.

US TRAVEL'S IPW TRADE SHOW: CHICAGO, IL, JUNE 14–18, 2025

Join VSC as a booth partner at U.S. Travel Association's IPW, the largest tour and travel trade show in North America. This five-day international inbound travel trade show takes place in Greater Fort Lauderdale, where SLO CAL booth participants meet and network with international and domestic tour operators from over 60 countries. Co-op participants have exclusive access to leads and appointment notes for two weeks following the show before being distributed to countywide partners. Participation is limited to six partners.

MARKETING

VSC provides a variety of marketing opportunities that are tailored to partners' specific goals. For more information on the opportunities below, email marketing@slocal.com.

OFFICIAL VISITORS MAGAZINE

Lodging investors and non-lodging partners can advertise in VSC's annual Official Visitors Magazine. Copies are available inside and outside the county at various distribution points. Production is expected to begin in July 2025.

CONTENT CALLS

Throughout the year, VSC executes an array of promotions based on seasonality, events and holidays and is constantly looking for content, imagery and videos to share. Keep up to date with VSC content needs via SLO CAL's weekly industry email, This Week in SLO CAL (TWISC). To subscribe, go to slocal.com/partners.

SOCIAL MEDIA CROSS-PROMOTION

VSC has a robust presence across a variety of social media networks. Instagram in particular is a top focus and in stories, partner content is often shared. To get your content noticed for potential cross sharing, make sure to tag it @slocal and include the hashtag #slocal.

PUBLIC RELATIONS

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

FAM TOURS & PRESS TRIPS

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

MEDIA PITCHES & LEADS

Respond to media pitches and leads anytime through postings in the weekly partnership newsletter This Week In SLO CAL (TWISC). Leads are offered by PR agency MMGY and with Visit California. To subscribe to TWISC, visit slocal.com/partners.

FILM SLO CAL

Film SLO CAL is the film commission for the County of San Luis Obispo and the point of contact for film projects in SLO CAL. The commission's role is to promote the county as a premier filming destination and to be the liaison between productions and local businesses and governments.

LOCATIONS AND CREW DATABASE

Film SLO CAL keeps comprehensive databases of potential locations, available crew and vendors within the region and actively promotes them to producers and location scouts. To be considered for directory listings please apply via the forms found at filmslocal.com or email film@slocal.com.

FILM SCOUT FAM TOURS

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

DATA INSIGHTS

VSC has long been committed to collecting, analyzing and sharing information to ensure a high-functioning and collaborative travel and tourism industry in SLO CAL. Hotel performance data through STR, visitor volume and insightful Business Intelligence Reports are made available to lodging investors, partners and stakeholders through SLO CAL Connection.

BUSINESS INTELLIGENCE REPORTS / MONTHLY

VSC has partnered with Tourism Economics to offer a first-of-its kind data and insights dashboard available to all lodging investors, partners and stakeholders. This monthly dashboard aggregates community-specific and countywide data from sources such as STR, VisaVue, and others, providing necessary information to plan for the future of communities and a benchmark of how the travel and tourism industry is performing in communities.

COMMUNITY BENCHMARK - WINE INDUSTRY REPORT / MONTHLY

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

PARTNERSHIP

SLO CAL CONNECTION

VSC works to represent lodging investors and all tourism-related businesses, providing guests with relevant information about our destination. SLO CAL Connection is your way to take control of your free online listing, add deals and events, access the most recent tourism research, respond to media and sales leads, view coverage featuring your business and network with the community. To sign up for a SLO CAL Connection account, visit slocal.com/partners or reach out to partnership@slocal.com.

"SLO CAL CRAFTED"

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



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