



**FY
27**

BUSINESS & MARKETING PLAN



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LETTER FROM THE PRESIDENT & CEO

Dear Visit SLO CAL Investors, Partners & Stakeholders,



San Luis Obispo County is entering a defining chapter, and the view ahead is one of real possibility. In 2025, SLO CAL welcomed a record 7.7 million visitors who contributed more than \$2.37 billion to our local economy—a signal not just of where we've been, but of what this destination is ready to become.

That trajectory didn't happen by accident. Last year we marked the 10th anniversary of the Tourism Marketing District, a decade in which visitation grew 10 percent, overnight stays climbed more than 20 percent and transient occupancy tax—the revenue that flows directly back into our communities—rose 86 percent. The TMD has done more than fund marketing; it has built a shared regional voice and a sustainable model that now positions us to lead, not follow, as the travel landscape shifts.

And it is shifting. Travelers are moving away from rushed itineraries and bucket-list checkboxes toward something more meaningful: authentic places, unhurried pace, room to breathe. Visit SLO CAL's latest Visitor Profile Study confirms what we've long believed—that our guests come here to slow down, talk to a local and discover something not on the map. Notably, nearly half now identify as multicultural, they skew slightly younger, and they increasingly travel with children. This is the traveler of the next decade, and SLO CAL is already the place they are looking for.

Our evolved brand campaign, "*Turns Well Taken*," was built for this moment. It celebrates the unexpected detours that become the best parts of a journey—and reinforces what has always made this destination different: Life's Too Beautiful to Rush®. Unveiled to a sold-out SLO CAL Summit under the theme "*Flourishing: Today & Tomorrow*," the campaign gives our partners a unified story to tell and travelers a reason to choose SLO CAL over anywhere else.

Several developments strengthen the runway ahead. The reopening of Highway 1 at Regent's Slide has restored full coastal access between SLO CAL and Monterey County after more than three years, reconnecting one of California's most iconic drives. The San Luis Obispo County Airport welcomed a record 811,905 passengers in 2025, a 9 percent year-over-year increase, expanding our reach to new feeder markets. And our advocacy work continues to pay dividends—from securing new alcohol licenses for the county to advancing the conversations on last-mile transportation and workforce housing that will shape our region's capacity to host the next generation of visitors.

The opportunity in front of us is larger than any single fiscal year. It is the opportunity to establish SLO CAL as one of California's most distinctive destinations—a place with its own character, its own pace and its own promise. Every record we set, every partnership we deepen and every traveler who leaves here changed moves us closer to that future.

Thank you for the trust, the investment and the belief you place in this work. What we build together in FY 27 will echo well beyond it.

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

Cathy Cartier

President & CEO, Visit SLO CAL

STRATEGIC DIRECTION 2029

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 our communities

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

Future-proof our organization

Amplify and steward the SLO CAL brand

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 2029 serves as Visit SLO CAL (VSC)'s north star. The Operational Plan and Experience SLO CAL 2050, the organization's destination management strategy, 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 track 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 2029

Visit SLO CAL (VSC) has defined four overarching organizational objectives in Strategic Direction 2029, including strategies and measurable key results. The FY 2027 strategies and key results for each department ladder up to these objectives.

Objective 1: FUTURE-PROOF OUR ORGANIZATION

STRATEGIES:

- Develop and execute a plan to renew the Tourism Marketing District (TMD)
- Engage in scenario-based agility planning that prepares VSC to respond to changing macroeconomic market conditions
- Drive internal efficiency and external effectiveness through activation of an innovation working group with agency partners

KEY RESULTS:

- Complete individual informational meetings with all city council members by December 2026
- Develop future funding scenarios to inform district renewal by December 2026
- Launch TMD renewal activities in January 2027
- Develop the strategy for the innovation working group by December 2026 and socialize the plan to gain understanding at annual Marketing Committee retreat in March 2027

Objective 2: AMPLIFY AND STEWARD THE SLO CAL BRAND

STRATEGIES:

- Develop and execute a demand-driving marketing program across opportunity audiences
- Leverage end-to-end storytelling and content to drive consideration
- Continue to foster adoption of SLO CAL nomenclature
- Align House of Brands activity to inspire cross-visitation
- Engage Marketing Committee in identification of new co-op opportunities

KEY RESULTS:

- Develop and implement a strategy in alignment with Visitor Profile Study to address opportunity audiences by July 2026
- Complete meetings focused research by August 2026, to develop the group strategy and brand architecture by October 2026
- Create updated “My SLO CAL” video to support nomenclature initiative and TMD renewal by October 2026
- Develop the family-focused “Turns Well Taken” asset by December 2026
- Initiate the development of a “SLO CAL Crafted: Culinary” focused end-to-end content series by June 2027
- Complete Brand Awareness Study by June 2027
- Identify one new co-op program by June 2027



Objective 3:

LEAD THE COUNTY TOURISM INDUSTRY IN FOSTERING A VIBRANT DESTINATION

STRATEGIES:

- Develop an advocacy framework for VSC that defines our role and approach to advocacy issues
- Invest resources to advocate on issues important to the visitor economy
- Continue to develop air service in collaboration with San Luis Obispo Regional Airport (SBP)
- Continue to advocate for ground transportation solutions

KEY RESULTS:

- Develop advocacy framework by December 2026
- Increase VSC's participation in industry-related advisory groups and committees by June 30, 2027
- Actively partner with SBP to enable an increase in passenger growth through participation in key airline conferences and media programs to support fly markets by June 30, 2027

Objective 4:

DEMONSTRATE VALUE TO INVESTORS, PARTNERS, STAKEHOLDERS AND COMMUNITIES

STRATEGIES:

- Share industry knowledge, best practices and actionable insights tailored to audiences within investor, partner and stakeholder categories
- Build local understanding of the positive impact VSC's marketing and advocacy has on the community
- Expand VSC connections and partnerships through collaboration and shared ideation

KEY RESULTS:

- Develop video asset to build understanding of VSC's value for partners and stakeholders by December 2026
- Create an education strategy across key industry stakeholder groups by December 2026
- Secure 20 local media stories to promote positive impacts of tourism by June 2027
- Grow or maintain investor, partner and stakeholder Net Promoter Score (NPS) over established baseline by June 2027

DESTINATION PARTNERS

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



KEY MOMENTS FY 2026

1.

In November 2025, Visit SLO CAL (VSC) hosted the annual SLO CAL Summit, with more than 260 tourism leaders, partners, investors and stakeholders in attendance—the largest turnout to date. Centered on the theme *“Flourishing: Today & Tomorrow,”* the Summit explored the current state of tourism in SLO CAL and California while offering fresh insights into evolving visitor behaviors and the science of human flourishing. Through discussions spanning brand innovation, emerging technologies like autonomous mobility and inclusive leadership, the event delivered both inspiration and actionable strategies to help shape a more resilient future for the region.

2.

In the summer of 2025, VSC commissioned Heart + Mind Strategies to conduct a Visitor Profile Study as a follow-up to the original study completed in 2021 to understand current and potential future visitors and to help the destination connect with travelers and drive visitation going forward. The study found that SLO CAL is increasingly chosen as a primary destination, with rising visitation, stronger return intent and greater engagement in local activities driven by its exploration-focused strategy. At the same time, SLO CAL is becoming more inclusive and diverse, attracting younger, more ethnically diverse and family-oriented visitors who see it as a welcoming place for all. The study's findings informed the new brand campaign.

3.

In February 2026, Visit SLO CAL launched *“Turns Well Taken,”* the next evolution of the destination's brand campaign. Born from 18 months of ethnographic research, strategic development and creative testing, the campaign builds on the equity established by its predecessor, *“The Land Of...”*, while evolving to center on the traveler's own experience—celebrating the unplanned moments that define an unforgettable trip to SLO CAL.

4.

The reopening of Highway 1 at Regent's Slide in January 2026 restored full coastal connectivity between San Luis Obispo and Monterey counties, reviving a vital tourism corridor. During the multi-year closure of the key Big Sur segment, Visit SLO CAL maintained clear messaging that Highway 1 through SLO CAL—including Ragged Point, San Simeon and Cambria—remained open. In partnership with See Monterey, VSC led coordinated reopening communications, positioning the moment as a reconnection of the full Highway 1 journey while promoting safe travel. The restored route now enables seamless itineraries and supports the economic vitality of Big Sur's coastal communities.

5.

In 2025, the San Luis Obispo County Regional Airport (SBP) saw a surge in visitation, welcoming a record 811,905 passengers, a nearly 9% increase from the previous year, marking its busiest year to date. Growth was driven by rising passenger demand and expanded air service and connectivity, with VSC supporting that momentum through strategic collaboration on regional destination promotion and airline development efforts.



BUSINESS & MARKETING LANDSCAPE





MACRO ENVIRONMENT

The American traveler in 2026 is approaching travel with greater intention and care. Travelers are becoming more deliberate planners, placing increased emphasis on value, flexibility and experiences that feel meaningful and worthwhile. Before making reservations, they are spending more time comparing options and considering their choices carefully. At the same time, travel continues to be viewed as a lifestyle investment rather than a luxury, with 55.4% of travelers saying travel remains a near-term priority, underscoring enduring demand in the years ahead.

GLOBAL TRAVEL LANDSCAPE

The global travel environment entering FY 27 continues to shift. The U.S. Travel Association and Tourism Economics now project that international visitation to the United States will weaken more significantly than previously forecast—driven by geopolitical tensions, a strong U.S. dollar and declining global sentiment toward U.S. travel. Full recovery of inbound international arrivals is not expected until 2029, when volumes are projected to return to 2019 pre-pandemic levels.

The broader domestic picture shows a market stabilizing but not accelerating. New policy measures and economic shifts have produced a growth outlook characterized as “stable but underwhelming,” with total travel spending forecast to grow approximately 2.2%. That headline figure masks a widening divide: higher-income travelers continue to prioritize travel and premium experiences, while lower-income households are reducing trip frequency, shortening stays and seeking greater value.

Travel intent, however, remains durable. More than half of Americans still name travel as a near-term priority—a signal that demand persists even as decision-making grows more deliberate. Travelers are increasingly gravitating toward shorter-haul trips, road travel and destinations that offer outdoor recreation, flexibility and value, reflecting a broader reassessment of discretionary spending without abandoning travel altogether.

CALIFORNIA LANDSCAPE

California's drive markets and diverse offerings provide some resilience, but regional growth is expected to be modest. Maintaining market share will require clear value, strong differentiation and agile marketing. Looking ahead, global events like the FIFA World Cup will put California in an international spotlight, opening opportunities to welcome visitors from around the world and encourage exploration beyond gateway cities.

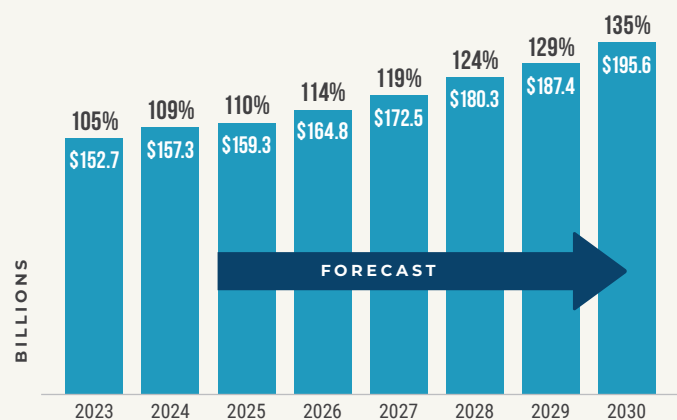
For SLO CAL, these conditions reinforce core strengths: proximity to major California population centers, scenic accessibility as a drive-market destination and an authentic, unhurried pace of travel that meets travelers where their priorities have shifted.

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

CALIFORNIA'S TOURISM INDUSTRY CONTINUES TO GROW

\$159B VISITOR SPENDING 2025

TOTAL CALIFORNIA TRAVEL SPENDING RECOVERY PERCENT RELATIVE TO 2019



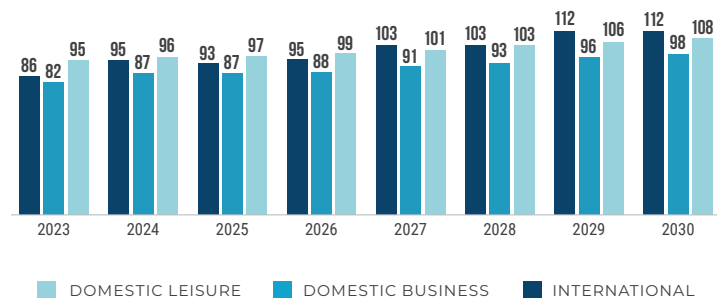
Source: Tourism Economics, February 2026

DOMESTIC LEISURE TRAVEL DEMAND CONTINUED TO

LEAD STATE RECOVERY IN 2025

FORECAST COMPARISON: VISITOR SPEND TO CALIFORNIA BY KEY SECTORS

(2019 = 100)

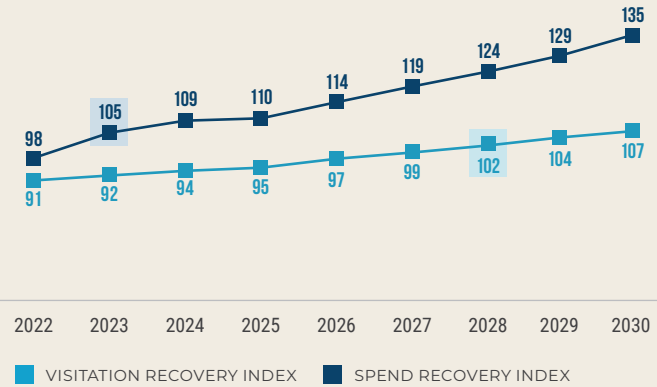


Source: Tourism Economics, February 2026

VISITOR SPENDING (BEFORE ADJUSTING FOR INFLATION)
FULLY RECOVERED TO 2019 LEVELS IN 2023
 BUT VISITOR VOLUME IS NOT FORECASTED TO REBOUND UNTIL 2028

VISITATION AND SPEND FORECAST COMPARISON

Recovery Index (2019=100)

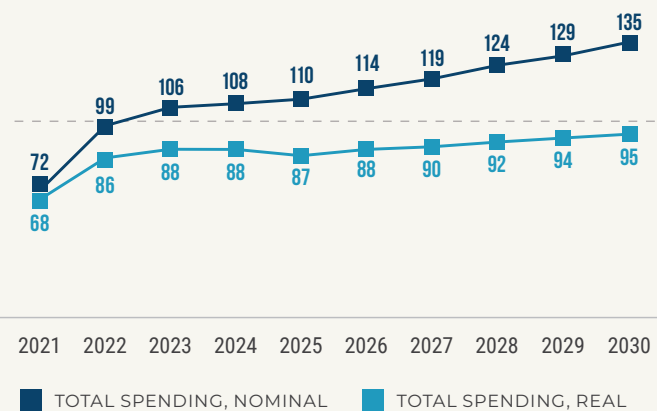


Source: Tourism Economics, February 2026

WHEN ADJUSTED FOR INFLATION,
 REAL VISITOR SPENDING
IS PROJECTED TO REMAIN BELOW 2019 LEVELS THROUGH 2030

VISITOR SPENDING RECOVERY: THE IMPACT OF INFLATION

Percent Relative to 2019

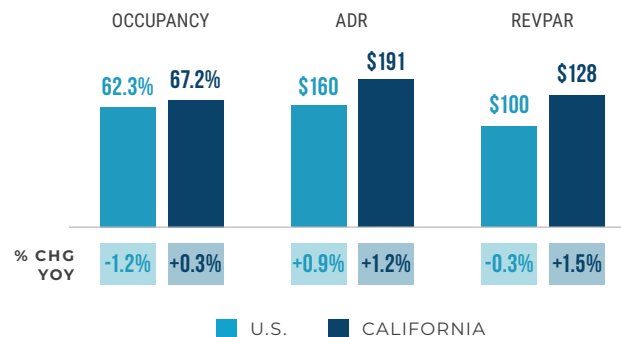


Source: Tourism Economics, February 2026

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 2025 YTD



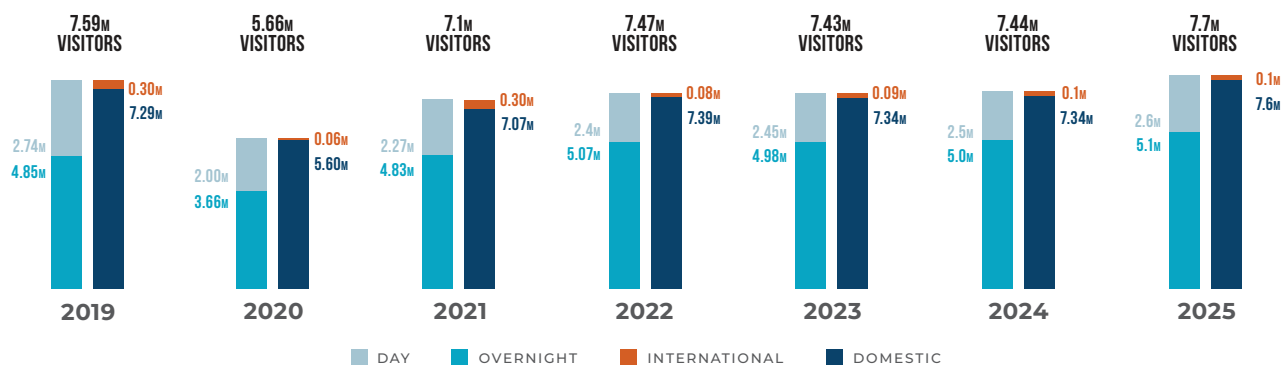
Source: CoStar Group, STR, LLC., Tourism Economics, April 2026

SLO CAL LANDSCAPE

Market & Performance Trends

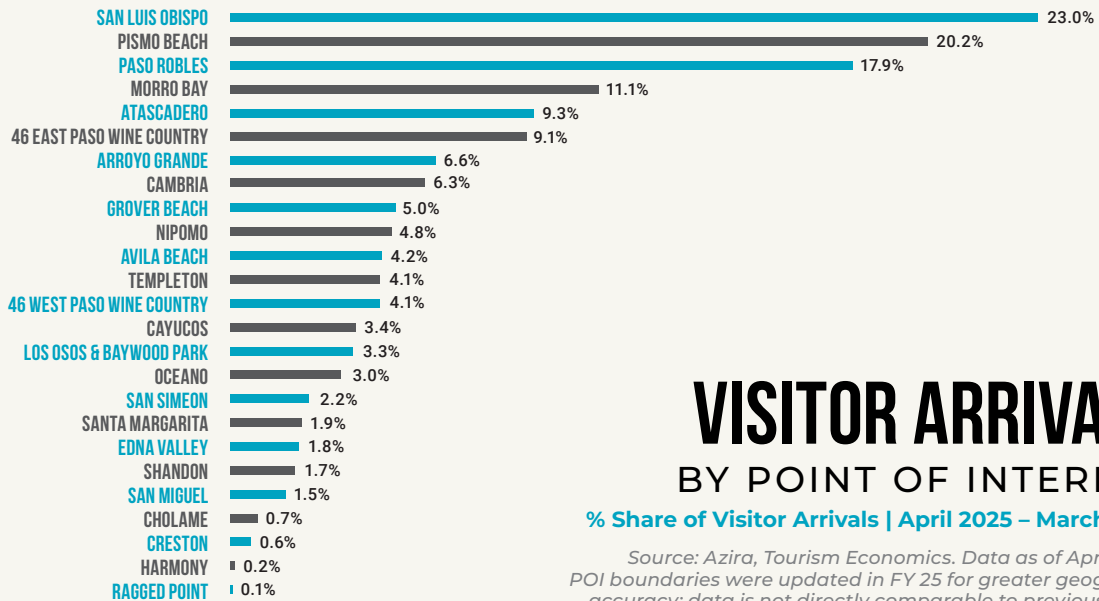
SLO CAL set new records in both visitation and travel spending in 2025, a meaningful indicator of the destination’s strength and the effectiveness of its marketing programs. However, real (inflation-adjusted) spending continues to lag nominal gains, a trend Tourism Economics projects to persist statewide through 2030. Between the years 2026 and 2031, hotel and motel rooms under construction or in the planning pipeline across SLO CAL could increase lodging supply by 30%, though delivery timelines and final counts may shift as projects progress. With real spending growth constrained by inflation and supply poised to expand significantly, generating destination demand becomes more critical than ever, and that pressure is already present in local lodging performance.

DATA INSIGHTS



Visitor Trend data is based on calendar year. Source: Tourism Economics. Data as of April 2026.

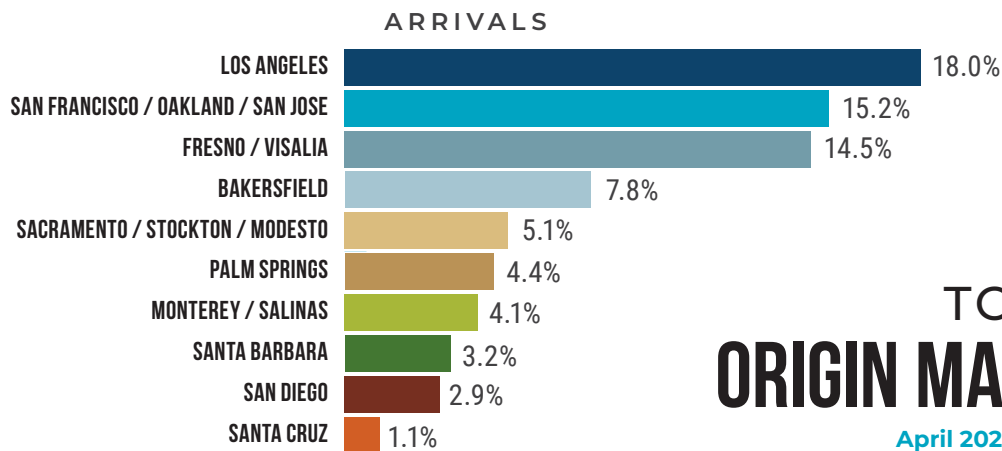




VISITOR ARRIVALS BY POINT OF INTEREST

% Share of Visitor Arrivals | April 2025 – March 2026

Source: Azira, Tourism Economics. Data as of April 2026.
POI boundaries were updated in FY 25 for greater geographic accuracy; data is not directly comparable to previous years.



TOP TEN ORIGIN MARKETS

April 2025 – March 2026

Source: Azira, Tourism Economics. Data as of April 2026.
Percentage share of visitors and origin markets represents data from tracked devices and do not estimate total devices or total visitors.

CROSS-VISITATION

1.4

COMMUNITIES PER
UNIQUE ARRIVAL

April 2025 – March 2026

LENGTH OF STAY

2.1 ↑ 0.2%
INCREASE
YOY APRIL-MARCH

DAYS

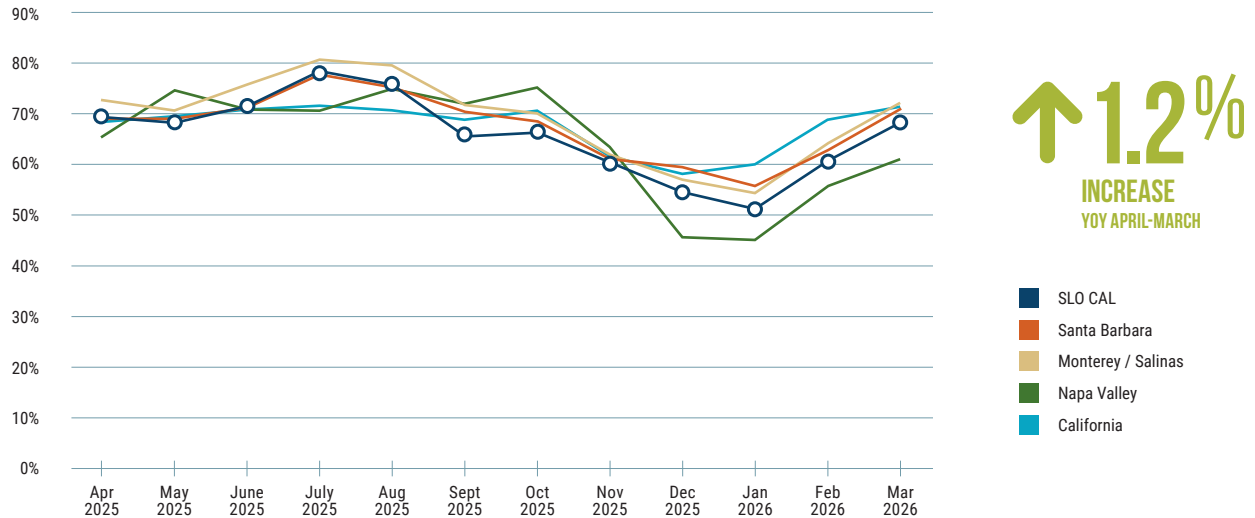
April 2025 – March 2026

Source: Azira, Tourism Economics. Data as of April 2026.

SLO CAL LANDSCAPE

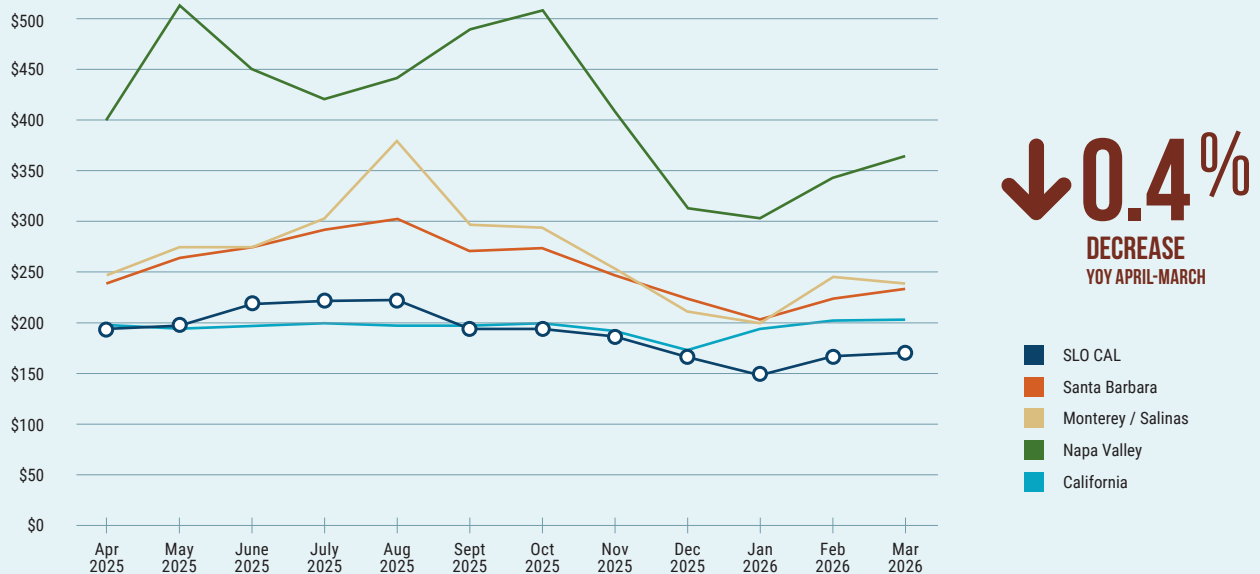
Market & Performance Trends continued

HOTEL OCCUPANCY (OCC)



Source: CoStar Group, STR, LLC., Tourism Economics. Data as of April 2026.

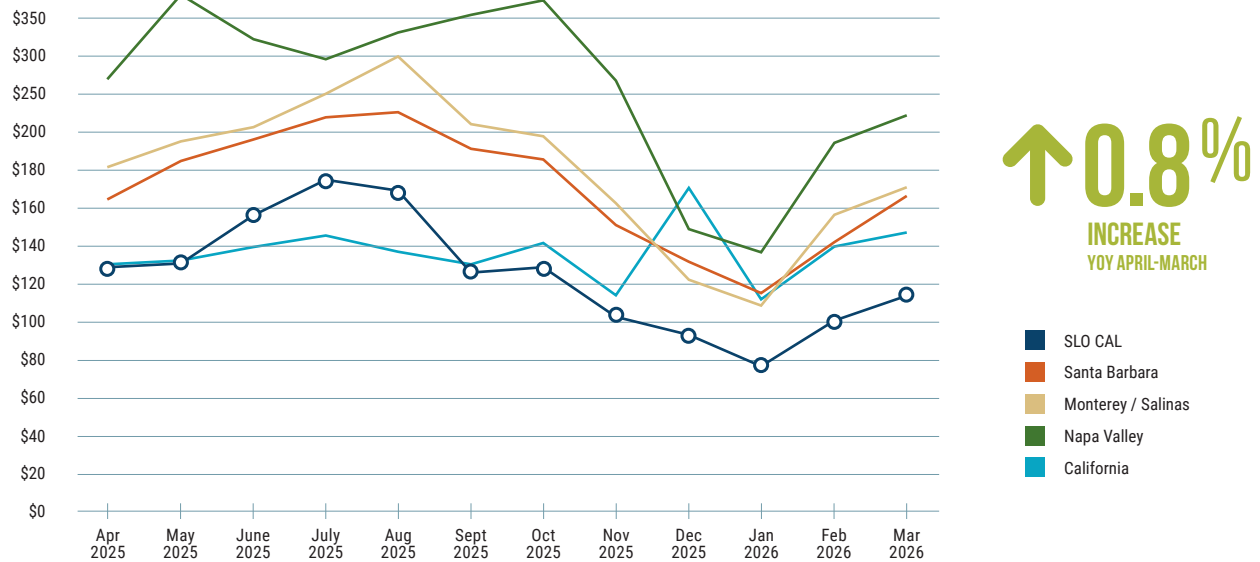
AVERAGE DAILY RATE (ADR)



Source: CoStar Group, STR, LLC., Tourism Economics. Data as of April 2026.

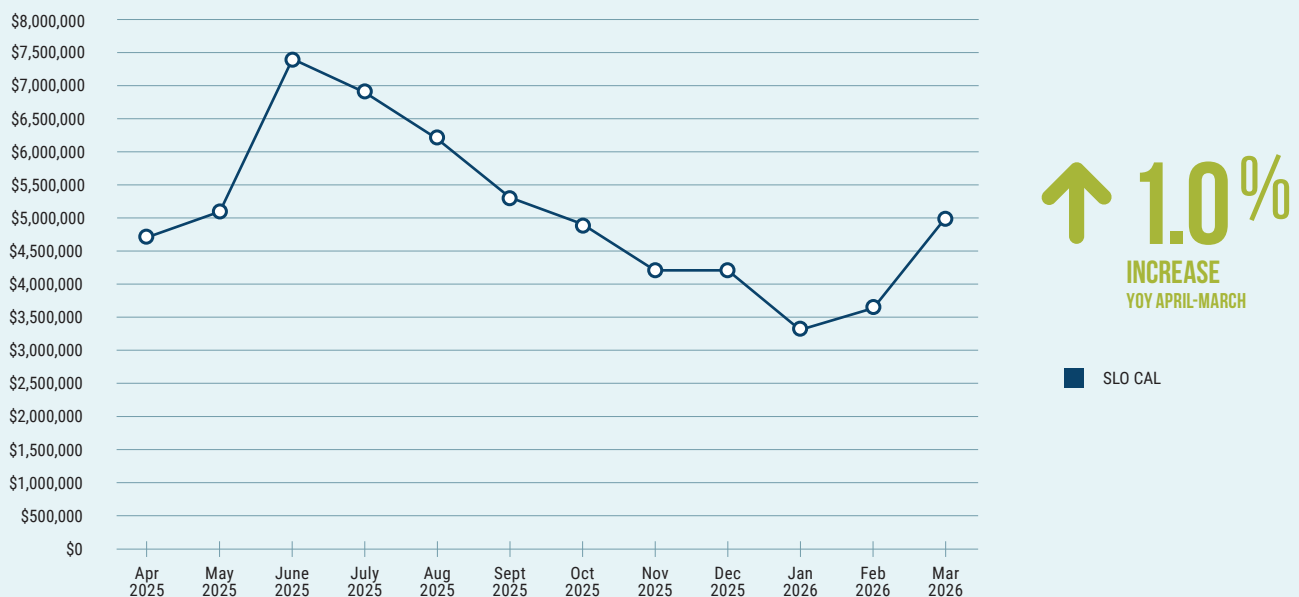


REVENUE PER AVAILABLE ROOM (REVPAR)



Source: CoStar Group, STR, LLC., Tourism Economics. Data as of April 2026.

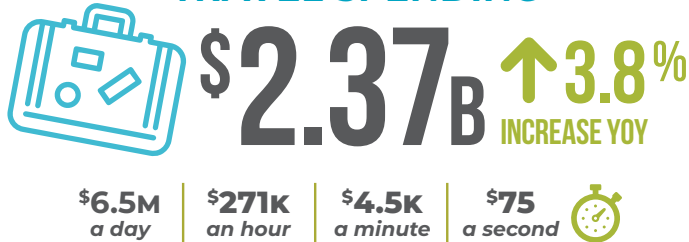
TRANSIENT OCCUPANCY TAX (TOT)



Source: Visit SLO CAL, Tourism Economics. Data as of May 2026.

WHY TOURISM MATTERS

TRAVEL SPENDING



INDUSTRY EARNINGS



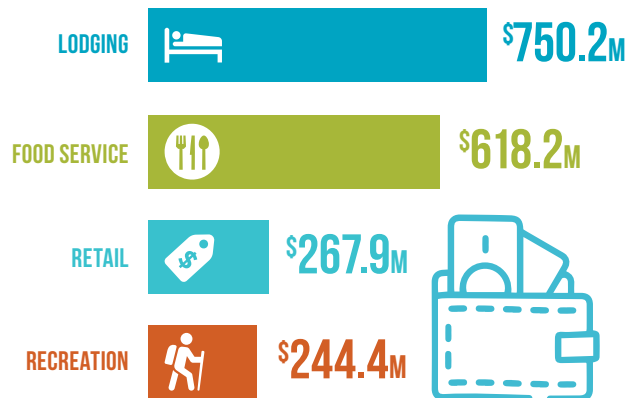
TOURISM PUTS



TOURISM CONTRIBUTES

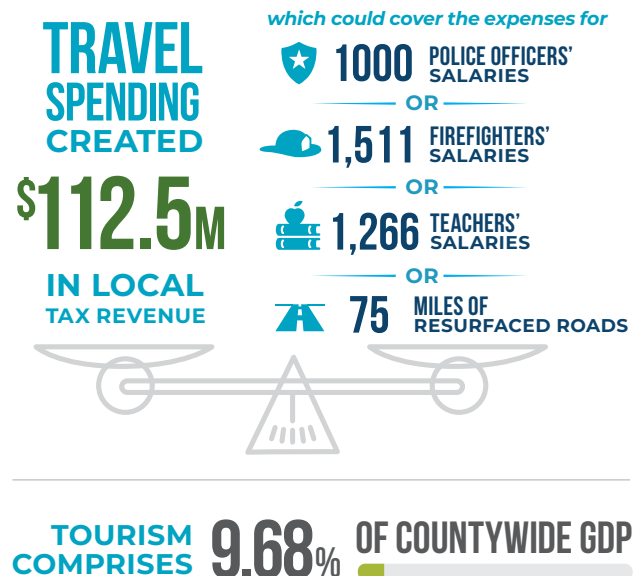


DIRECT SPENDING BY SECTOR



WITHOUT VISITORS
EACH SLO CAL HOUSEHOLD
WOULD NEED TO SPEND
AN ADDITIONAL **\$21,301**
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
\$1,935 in taxes



Data based on 2025 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



SPONTANEITY

SPONTANEOUS EXPLORATION

Travelers are prioritizing flexibility and discovery over rigid itineraries, wanting the freedom to follow their curiosity and satisfy the desire for novelty and exploration.

AUTHENTIC CONNECTION

Digital fatigue is driving renewed interest in authentic human connection, with travelers seeking local knowledge, culture and community experiences. Destinations that facilitate genuine interaction between visitors and residents are standing out.

FEEL LIKE A LOCAL

Visitors continue seeking smaller towns that offer authentic experiences and a slower pace, with a shift toward intimate and meaningful travel.

MINDFUL ESCAPE

Travelers increasingly view “disconnection” as a luxury, seeking immersive experiences that foster deeper connections with nature, culture and self. SLO CAL’s wide-open landscapes, coastline and unhurried pace position the region as a natural destination for those looking to slow down.

ROAD TRIP RESURGENCE

The road trip continues to surge, with 74% of travelers drawn to road trips that make travel more spontaneous and 76% favoring driving over flying for the flexibility it provides.

CULINARY

FARM-TO-TABLE

Travelers are seeking hands-on, place-based experiences that connect them to farms, producers and local food systems. Agritourism, farm tours and field-to-fork dining are growing as visitors want to engage with the landscapes and people behind what they eat.

INTENTIONAL DRINKING & EVOLVING WINE CULTURE

Alcohol consumption is declining with just 54% of U.S. adults drinking (a record low) and 77% of Gen Z choosing holidays with no drinking involved. Travelers expect high-quality alcohol-free options alongside traditional offerings. Meanwhile, wine is evolving from a purely drinking occasion to a cultural experience tied to storytelling, place and craft.

PERSONALIZED & PURPOSE-DRIVEN

IDENTITY-DRIVEN TRAVEL

Travel is becoming more personal, with trips built around passions, interests and lifestyle rather than simply “getting away.” Visitors are seeking destinations that allow visitors to express who they are through experiences.

EVENTS AS TRAVEL CATALYSTS

Travelers are planning trips around concerts, festivals, cultural moments and sporting events, with events becoming key catalysts for destination discovery and trip timing. Visitors are also more aware of the environmental and community impact of events they attend.

Source: Booking.com, Chase Travel, Condé Nast Traveler, Expedia Group, Forbes, Gallup, Insight Vacations, Lugos Travel, National Geographic, RVshare, Skyscanner, Trip.com



SLO CAL Opportunity

The trends shaping travel in 2026 continue to reinforce Visit SLO CAL's approach to marketing the region as a place where Life's Too Beautiful to Rush®. From spontaneous exploration and authentic local connection to evolving culinary and wine experiences, the attributes travelers are seeking map directly to what SLO CAL delivers with the uniqueness of its people, place and pace. Carrying forward this alignment through fresh storytelling across paid, owned and earned channels is the opportunity ahead.



MEDIA TRENDS: PAID

TREND	IMPLICATIONS
LION'S SHARE OF DAILY MEDIA TIME IS DIGITAL - Subscription OTT (Ex. Netflix, Disney+) has shown the most growth - Digital audio time matches time spent with social networks - VSC's 'Spontaneous Traveler' target (detailed in the New Audience Framework) spends 30% less time with media than the national average, but nearly twice as much time with digital audio	Leaning heavily on digital media platforms—with a balanced mix of video, digital audio and paid social—will provide the most efficient and effective way to reach and influence 'Spontaneous Travelers.'
CTV LEADS DIGITAL CONSUMPTION - U.S. adults spend nearly seven hours a day with video 'Spontaneous Travelers' spend 25% more time watching streaming services at 10.5 hours than viewing broadcast TV channels at 8 hours per week 48% of 'Spontaneous Travelers' still subscribe to pay TV (or cable TV), while 83% subscribe to one or more streaming services	CTV will anchor SLO CAL video tactics, driving reach and awareness among the target audience. Broadcast channels should be considered for unique efforts in specific markets to further amplify paid, owned and earned efforts.
NETFLIX AND YOUTUBE LEAD TIME SPENT - Netflix is the top streaming platform nationally and among the 'Spontaneous Traveler' target; however, the majority of subscribers pay for ad-free platforms - YouTube and FAST channels are growing more quickly and breaking through to steal share, with one in five 'Spontaneous Travelers' using FAST channels	Video partner mix should prioritize reach and efficiency. YouTube will remain a core video tactic for the ability to reach 'Spontaneous Travelers' efficiently, while partnerships with Tubi and PlutoTV, two FAST platforms with high reach of the target audience, will add incremental reach to the paid media plan.

Source: eMarketer

MEDIA TRENDS: OWNED

TREND	IMPLICATIONS
COMPETITION SHIFTS THE ALGORITHM - Content is no longer rewarded predominantly by audience size as algorithms put more weighting on evaluating how others, non-followers, engage with what is posted - Non-follower views on Instagram grew from 30% to 49% between 2023 and 2025, meaning relevance and quality now determine distribution more	VSC will continue to develop content that earns its place in the feed through strong hooks, emotional resonance and genuine storytelling, creating posts that audiences actively save, share and return to rather than simply scroll past. It will continue to develop content that provides broad destination education that will grow awareness in increasing non-follower audiences.
SOCIAL AS SEO & GEO - Social platforms now function as primary search and discovery engines, nearly a third of all consumers, and over half of Gen Z, bypass traditional search to find destinations directly on social platforms - As AI-driven tools increasingly pull from social content, optimizing for machine-readability is as important as capturing human attention	VSC will integrate keyword-rich captions, location-specific language and on-screen text across all content, ensuring SLO CAL surfaces natively when travelers search for their next destination and that content is indexed accurately by both platforms and AI recommendation engines.
AI FLOODS THE FEED - Generative AI has made content easier to produce at scale, flooding feeds with synthetic imagery that audiences are increasingly able to identify and distrust - Over half of users now question the authenticity of online content, creating a growing premium on content that feels unmistakably real	This is a natural advantage for SLO CAL. By leaning into genuine local voices, authentic aesthetics, and unscripted storytelling, VSC can cut through AI-generated noise and build the trust that drives travel consideration and booking.
SOUND ON & SETTLED IN - Over 80% of Instagram Reels are now watched with sound on, and appetite is growing for content with depth, texture and narrative substance - Soundscaping, voiceover and ambient audio have become powerful storytelling tools in their own right	SLO CAL's sensory identity, crashing coastline, vineyard stillness, the hum of a farmers' market, is a ready-made advantage. VSC will continue to treat audio as a narrative tool, using sound to transport viewers into the destination and deepen the emotional pull of every piece of content. Furthermore, as part of the new strategic evolution, more voiceover will be used in social videos moving forward.

Source: eMarketer

MEDIA TRENDS: OWNED

TREND	IMPLICATIONS
DARK SOCIAL MIGRATION • Influence is increasingly moving into private spaces (DMs, group chats, and saved collections) making it harder to track but more meaningful when it happens • Sends and saves are now weighted 3 to 5x more heavily than likes, making them an even more valuable engagement signal a post can generate	VSC will optimize for these deeper engagement signals rather than surface metrics, creating content specifically designed to be saved and shared and inviting audiences to do so. This evolved content will include options such as practical guides, immersive series, and insider-led storytelling that audiences want to hold onto and pass on.
A NEW DIMENSION ADDED • Instagram has introduced clickable links within Reels, allowing creators to cross-connect to other content and accounts directly from within a video • This marks a significant shift in how social platforms are enabling richer, more interactive storytelling and signals a broader direction of travel toward content that does more than simply inform or inspire	VSC will continue to monitor platform innovations and evolve its approach in line with meaningful changes, adopting new formats and features where they strengthen the strategic and narrative goals of the destination, ensuring every creative decision is purposeful and brand-led.

Source: eMarketer



MEDIA TRENDS: EARNED

TREND	IMPLICATIONS
BLURRING OF PAID, EARNED & OWNED - Media outlets are increasingly diversifying revenue streams by including sponsored content, affiliate commerce, branded partnerships and events/ activations - The line between editorial and paid is becoming more fluid as publishers look for sustainable business models - As a result, some media opportunities now sit between earned storytelling and strategic partnerships—making integration of paid/earned/ owned more important than ever	Continue to pursue strong earned storytelling while recognizing where integrated opportunities including brand partnerships or collaborative content may exist.
FREELANCER ECONOMY EXPANDS - More journalists today are freelance writers versus staff editors - Freelancers are diversifying income streams by developing subscription-based newsletters or Substacks, educational courses, professional retreats and consulting on content for brands and/or PR professionals	Continue to build relationships with freelance writers who contribute to multiple outlets, including their owned channels to reach niche audiences. Consider utilizing writers who visit SLO CAL for owned/digital content (blog posts, trend articles) to expand storytelling resourcing.
EDITORIAL BECOMES MULTI-PLATFORM - Travel publications are expanding beyond traditional articles to tell stories across newsletters, podcasts, social video, YouTube, and emerging platforms - Many outlets now have editors dedicated to specific channels such as social media, video, or podcast programming - This shift means travel storytelling now lives across multiple formats, creating more opportunities for destinations to share compelling narratives	Approach media relations with a multi-platform mindset, providing rich narratives, expert voices supporting those narratives and visuals that extend the story across platforms, to help journalists bring SLO CAL to life wherever audiences are discovering travel inspiration.

Source: TURNER

MEDIA TRENDS: EARNED

TREND	IMPLICATIONS
EARNED MEDIA'S IMPACT ON AI SEARCH • Generative AI tools are increasingly surfacing travel information by pulling from reputable editorial sources • According to study from MuckRack, analyzing millions of AI-cited links from hundreds of thousands of prompts, more than 85% of cited links in AI response came from earned media sources • This elevates the long-term value of credible earned media coverage	Strengthen SLO CAL's visibility across emerging AI-powered search and recommendation platforms through high-quality placements in trusted publications.
THE POWER OF TRUSTED VOICES • In an era of AI-generated content and information overload, audiences increasingly value trusted voices • Readers are seeking credible recommendations from journalists who bring firsthand experience and expertise • This creates renewed value for experiential storytelling and journalist-led travel narratives	Host media with itineraries that showcase the rich experiences that travelers can have in the destination while introducing them to the people who are shaping the culture of SLO CAL.
NICHE COMMUNITIES DRIVE DISCOVERY • Travel storytelling is increasingly shaped by niche audiences connected through newsletters, podcasts and specialized media communities • While smaller audiences, they are highly engaged and heavily influenced by the niche content that they follow • Creators focused on specific interests – from food and outdoor adventure to books to fashion – can strongly shape how audiences perceive and discover new destinations	Prioritize storytellers whose audiences align closely with SLO CAL's core experiences and key narratives to introduce the destination to new, highly engaged audiences.

Source: Meltwater, Muck Rack, TURNER



SLO CAL 2025 VISITOR PROFILE





In the years since the 2021 Visitor Profile Study, COVID-19 receded as an obstacle to travel, but other market and cultural forces have emerged that shape traveler decision-making. In summer 2025, Visit SLO CAL engaged Heart + Mind Strategies to understand current and potential future visitors in comparison to 2021. Heart + Mind Strategies conducted an online survey with 3,000 travelers across California and key fly market Designated Market Areas (DMAs).



MODE Online Survey

LENGTH 15 Minutes

DATES July 10 – August 4, 2025

AUDIENCE 18 years of age or older
Traveled 50+ miles for leisure travel
in past 12 months and stayed
overnight in paid accommodation

GEOGRAPHY Los Angeles
San Francisco
San Diego
Sacramento
Phoenix
Denver
Seattle
Dallas

VISITOR PROFILE KEY TAKEAWAYS & IMPLICATIONS

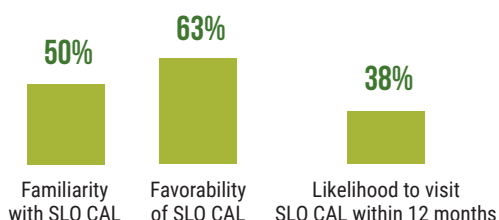
SUMMER 2025

OBJECTIVE

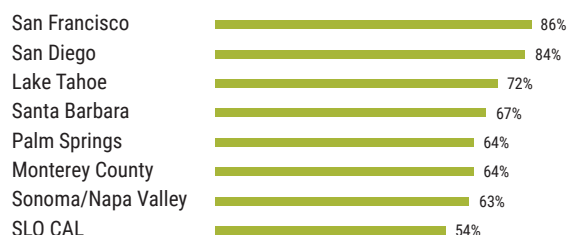
Measure changes in travel attitudes and plans

Assess SLO CAL's positioning within the context of competing destinations

TRAVELER PERCEPTIONS



TRAVELERS VISITING EACH DESTINATION (EVER)



KEY TAKEAWAYS

Travel demand is constrained by economic pressure and geopolitical factors, not lack of desire.

SLO CAL visitation has improved (54%, up from 46% in 2021), but still trails major destinations.

Travelers are shifting to closer-to-home, drive-market destinations (33%).

SLO CAL lags top California competitors in familiarity, favorability and intent.

One in five have postponed trips; only 7% have canceled a trip.

Perception dramatically improves after visitation – on par with competitors.

Lower- and mid-income travelers are trading down (drive vs. fly, more affordable destinations, lower-cost lodging).

SLO CAL owns a strong emotional attribute: widely perceived as welcoming (88%).

IMPLICATIONS

The market is moving toward value-driven, proximity-based travel, creating a strong tailwind for regional destinations like SLO CAL.

The core issue is not appeal, it's conversion. Once people visit, perceptions strengthen dramatically driving first-time visits—the single biggest lever to strengthen brand position.



OBJECTIVE

Profile SLO CAL visitors, their trip characteristics, and how to motivate them to return

Profile potential visitors and how to motivate visitation versus the competitive set

KEY TAKEAWAYS

SLO CAL visitor base is evolving: slightly younger, more multicultural, more likely to have kids at home.

Drive markets (California DMAs) represent the strongest opportunity.

Nearly 4 in 5 visitors are repeat, signaling strong loyalty.

Core and Lean audiences* are geographically concentrated and predisposed to visit.

Trips are increasingly spontaneous (69% booked within one month).

Millennials and Gen X show highest intent; multicultural families are key growth segments.

Mix of adults-only (55%) and family trips that include kids (35%).

Top motivators: coastal towns, sandy beaches, scenic hills and mountains, road trips between unique towns/small cities

Visitors are engaging in more activities per trip.

Decision drivers: past experience, word-of-mouth and digital content (articles, social, influencers).

IMPLICATIONS

SLO CAL has a highly loyal base, but must evolve its storytelling and experiences to reflect a more diverse, modern traveler while reinforcing repeat behavior.

Growth depends on targeting high-propensity regional audiences with clear, experience-led messaging and converting them into first-time visitors.

**see Audience Framework section*

VISITOR PROFILE DEEP DIVE: FAMILIES

SUMMER 2025

Those taking trips with kids tend to spend the most across categories, including lodging and accommodations, making families an important growth segment to SLO CAL.

Total Spend on Most recent Trip to SLO CAL of those visiting since 2022	Total Travelers	2021 VPS Report	Solo Trip	Trip with Kids	Adults-only Trip	Partner-only Trip	Peer Trip
Lodging/Accommodations	\$632	\$339	\$526	\$668	\$628	\$588	\$548
Transportation (gasoline, EV charging, rental, flight, etc.)	\$388	\$158	\$198	\$462	\$373	\$366	\$236
Meals, food and groceries	\$386	\$234	\$264	\$416	\$389	\$330	\$366
Shopping	\$346	\$132	\$188	\$447	\$309	\$281	\$315
Entertainment that's part of visiting attractions	\$189	\$100	\$100	\$254	\$163	\$125	\$115
Entertainment such as concerts and shows	\$181	\$44	\$106	\$242	\$156	\$125	\$152
All other items	\$163	\$59	\$73	\$206	\$151	\$151	\$83

Across trip types, families tend to visit more frequently and stay longer. More than other visitor segments, they prioritize having fun, reducing stress and feeling rejuvenated—mentally, physically or spiritually—and creating connection and memories. Families also visit more communities across SLO CAL and participate in a wider range of activities, from visiting beaches, shopping and dining to driving Highway 1, hiking, water sports and live music.



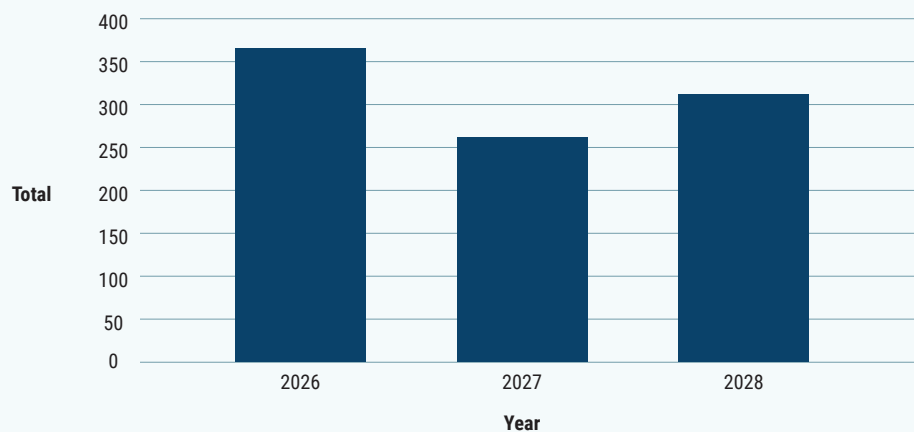


DRIVING DEMAND FORECAST



As of April 2026, there are 10,551 hotel and motel rooms across SLO CAL, with share concentrated in the City of San Luis Obispo (24.6%), the City of Pismo + Shell Beach (19.2%), the City of Paso Robles (15.5%) and the City of Morro Bay (9.5%). Over the next five years, an estimated 3,198 additional rooms in the pipeline represent a 30% increase, bringing total available inventory to nearly 13,800 rooms by 2031 pending project approvals, financing, construction timelines and ultimate project completion.

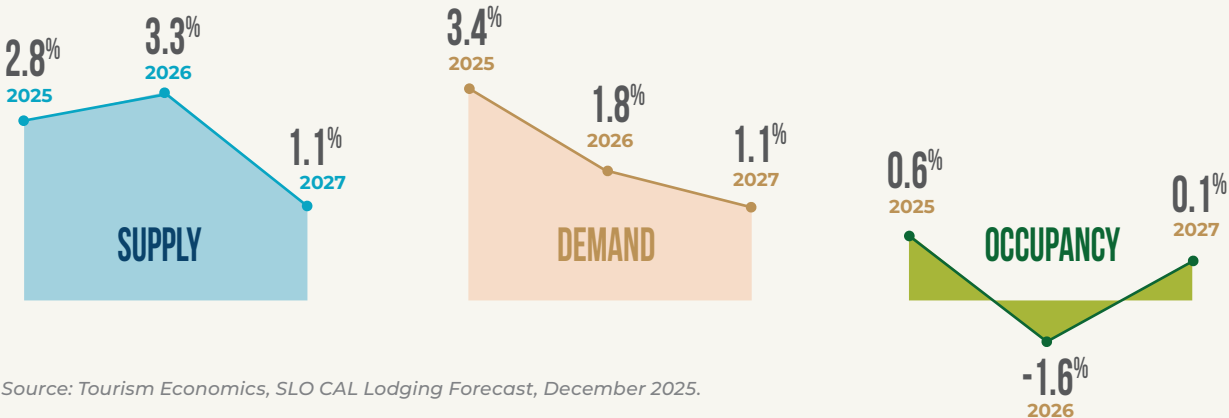
HOTEL & MOTEL ESTIMATED ROOM GROWTH BY YEAR



According to Tourism Economics' December 2025 SLO CAL Lodging Forecast, supply growth is projected to outpace demand growth in 2026 and 2027, putting downward pressure on occupancy, Average Daily Rate (ADR) and Revenue Per Available Room (RevPAR), metrics that directly impact Transient Occupancy Tax (TOT) revenue and the economic health of communities across the region. This makes generating demand increasingly critical, particularly during shoulder seasons and midweek periods where there is increased opportunity.

Source: Visit SLO CAL lodging inventory tracking based on self-reported property data and ongoing audits conducted through direct outreach. Information subject to change.

SUPPLY, DEMAND & OCCUPANCY

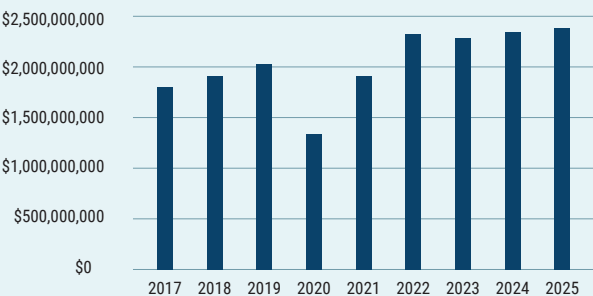


THE SLO CAL BRAND & DEMAND GENERATION

Since its inception a decade ago, Visit SLO CAL marketing programs have driven demand. When it was established in 2017, Life's Too Beautiful to Rush® captured the spirit of SLO CAL: relaxed, radiant and full of life. Since then, the power of the brand has expanded its reach through storytelling that showcases and celebrates the people, place and pace that make the region distinct. This messaging resonated with consumers. Visitor spending and transient occupancy tax (TOT) over the past three years demonstrate the resonance and strength of "The Land of..." brand campaign and original video content.



VISITOR SPENDING



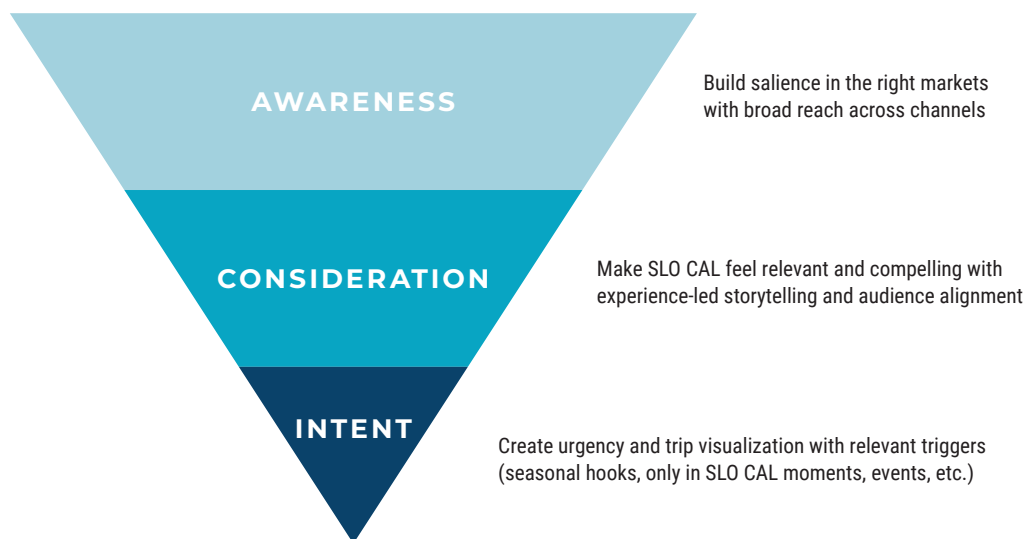
TRANSIENT OCCUPANCY TAX



Source: Dean Runyan & Associates, The Economic Impact of Travel in California, April 2026.

In unpredictable times, consumers want consistency and relevance. Extensive research across decades of economic cycles confirms that brands maintaining or increasing during downturns outperform those that cut back, building long-term brand equity. For a brand still building awareness, regaining visibility and share requires sustained effort—making consistent, measured investment and cohesive storytelling a priority for Visit SLO CAL.

As detailed in the Visitor Profile section, SLO CAL continues to gain traction, particularly among past visitors but remains underleveraged relative to competitive California markets, signaling a clear opportunity to grow first-time visitation. Reaching first-time visitors requires the brand to show up in compelling ways across the funnel, guiding travelers and building confidence in SLO CAL as the right choice for their next trip.



GROUPS & MEETINGS: MIDWEEK/SHOULDER SEASON OPPORTUNITY

"Having personally experienced SLO CAL through a previous FAM trip, I saw firsthand how naturally the destination supports the future of meetings: wellness, experiential programming, intentional hospitality, elevated food and beverage, and meaningful connection.

From wine tastings and olive oil experiences to destination-driven wellness and immersive off-site venues, SLO CAL creates the kind of memorable experience that planners want to replicate for their own clients and organizations."

— ASHLEY BROOKE JAMES
MEETING PLANNER

SLO CAL is an emerging destination for groups and meetings—one that delivers what meeting planners are seeking today in ways that feel genuine for the region. That positions this segment as a meaningful opportunity to drive demand, particularly during mid-week and shoulder season need periods.

Planners are no longer simply organizing logistics—they are designing experiences that drive connection, engagement and lasting impact. Today's attendees want opportunities to connect meaningfully and walk away having experienced something, not just attended something. That is why Return on Experience (ROE) has become the defining success metric for this shift.

This plays directly to SLO CAL's strengths. Rather than reinventing itself as a meetings destination, SLO CAL can reframe what already defines the region:

- Natural beauty and open space that foster clarity, creativity and reset
- Coastal towns and small communities that enable intimacy over scale
- Experiential richness—from wine and food to outdoor activities—that integrates naturally into programming
- A pace and tone that encourages authentic connection over transactional interaction

NEW FY 27 RESEARCH

SLO CAL is well suited for small to mid-sized groups (25–200 attendees) including executive meetings, board retreats, leadership offsites and team gatherings. To understand what planners look for when selecting a destination, where they source inspiration and information and how SLO CAL compares to competitive locations like Santa Barbara and Monterey, VSC will conduct qualitative research in summer 2026. Those findings will inform a new strategy and brand architecture that translates Life's Too Beautiful to Rush® positioning into the meetings segment. From there, VSC will augment its sales and marketing approach in close collaboration with destination partners.





NEW AUDIENCE FRAMEWORK





For FY 27, Visit SLO CAL (VSC) is introducing a new audience framework that evolves the ‘Purposeful Traveler’ based on opportunity targets defined in the Visitor Profile conducted in 2025. To maximize growth potential, four new segments were identified:

CORE	LEAN	SWING	UNINTERESTED
High favorability and a high likelihood to visit	Mild favorability and high likelihood to go	High favorability and low likelihood to go	Somewhat favorable but not likely to visit or not at all favorable
80% are past visitors	High favorability and mild likelihood to go	Mild favorability and mild likelihood to go	89% are not likely to go
	70% are past visitors	55% are non-visitors	

The Core segment shows significant opportunity to drive visitation, with high favorability for SLO CAL and high likelihood to visit. The Lean group combines mild to high favorability with high to mild propensity to visit, representing an opportunity to move the visitation needle. Together, Core and Lean account for nearly four out of five past visitors.

To maximize growth potential, VSC created an additional layer of segmentation focused on isolating repeat and first-time visitors. Just over half of SLO CAL visitors fall into the Core and Lean segments and are most prominent in the California markets, with Swing showing opportunity in fly markets. First-time visitors will be the primary focus across all segments as they represent significant potential to drive incremental visitation.

Spontaneity was a defining overlapping characteristic—69% of current visitors book one month or less prior to traveling, and one-in-four ‘Purposeful Travelers’ are spontaneous when they travel. This characteristic aligns with the brand storytelling architecture of “Turns Well Taken” and will be central to the evolution of the ‘Purposeful Traveler.’ Leaning into key psychographic and demographic traits shared between the visitor profile and the ‘Spontaneous Traveler’ will allow Visit SLO CAL to customize messages to drive greater engagement.

PRIMARY TARGET AUDIENCE

THE SPONTANEOUS TRAVELER

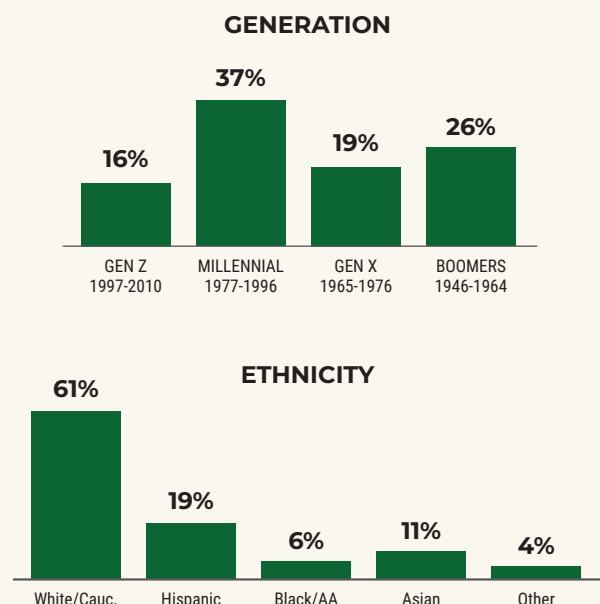
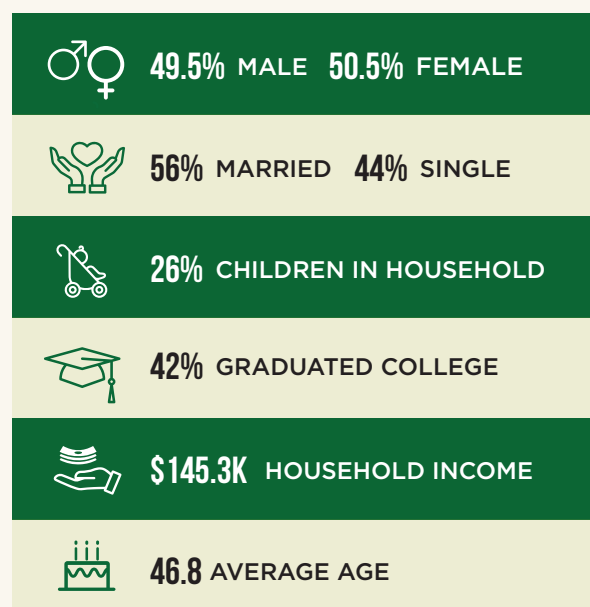
Curiosity, Enrichment, Exploration: Mindset

66% 13.3M
CALIFORNIA

The 'Spontaneous Traveler' is curious and seeks enrichment. They travel for new perspective, visiting destinations they have never been to satisfy that curiosity. Seeking out lesser-known destinations often provides cultural enrichment and a chance to meet people from different backgrounds.

Millennials and GenX account for 56% of 'Spontaneous Travelers,' aligning with visitor profile demographics. With household incomes over \$145K, 'Spontaneous Travelers' are less likely to be affected by economic pressures and are more likely to hold firm on travel plans. While younger audiences will be prioritized, select opportunities to keep SLO CAL top of mind with older travelers will be incorporated.

THE SPONTANEOUS TRAVELER: DEMOGRAPHICS

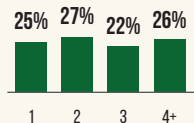


Source: MRI-SIMMONS SPRING 2025 Market-by-Market; Visited California base

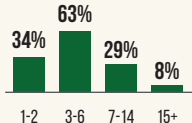


THE SPONTANEOUS TRAVELER: TRAVEL PROFILE

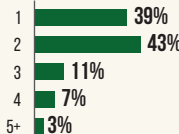
ROUND TRIPS



NIGHTS AWAY VACATION



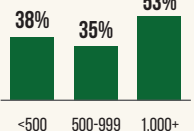
TRAVEL PARTY ANY TRIP



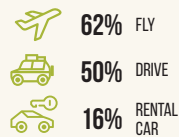
TRAVEL WITH LAST TRIP



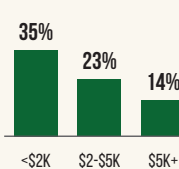
MILES TRAVELED LAST TRIP



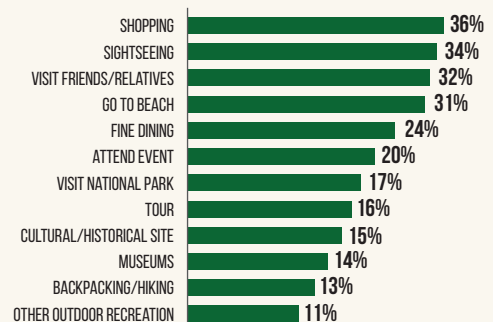
MEANS OF TRAVEL ANY TRIP



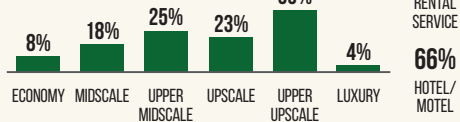
ANNUAL TRIP SPENDING



TRIP ACTIVITIES ANY TRIP



ACCOMMODATIONS ANY TRIP



SECONDARY TARGET AUDIENCE

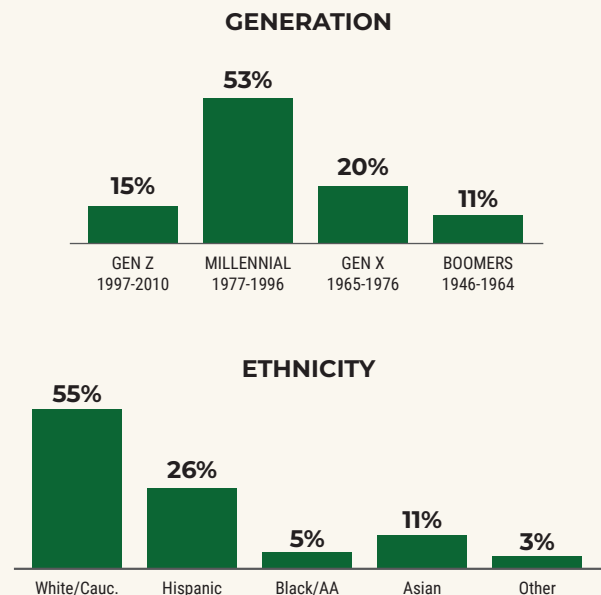
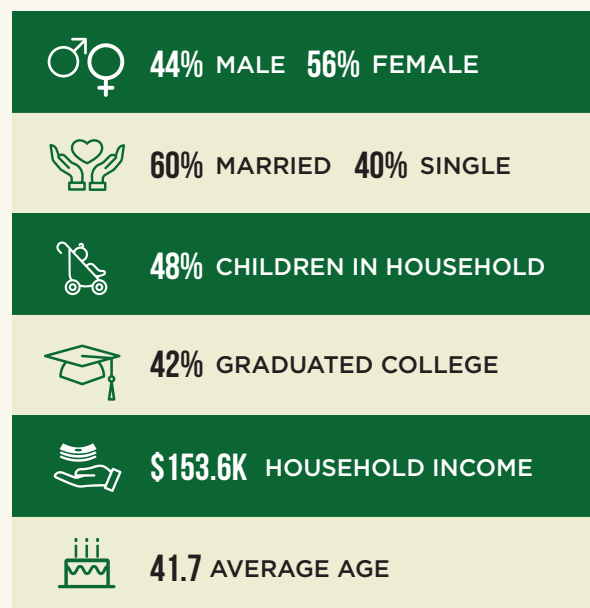
FAMILIES

The Spontaneous Traveler &
Travel With Children

15% 3.0M
CALIFORNIA

The 'Spontaneous Traveler Family' is composed largely of Millennial families (53%) with nearly half having children in the household. They are more affluent than the 'Spontaneous Traveler,' with an average household income of more than \$153K. Nearly a third take two trips per year, with vehicles being the primary means of transportation (80%). With over half flying to their destination, fly markets will also be important to reaching this target—though drive markets remain the primary focus.

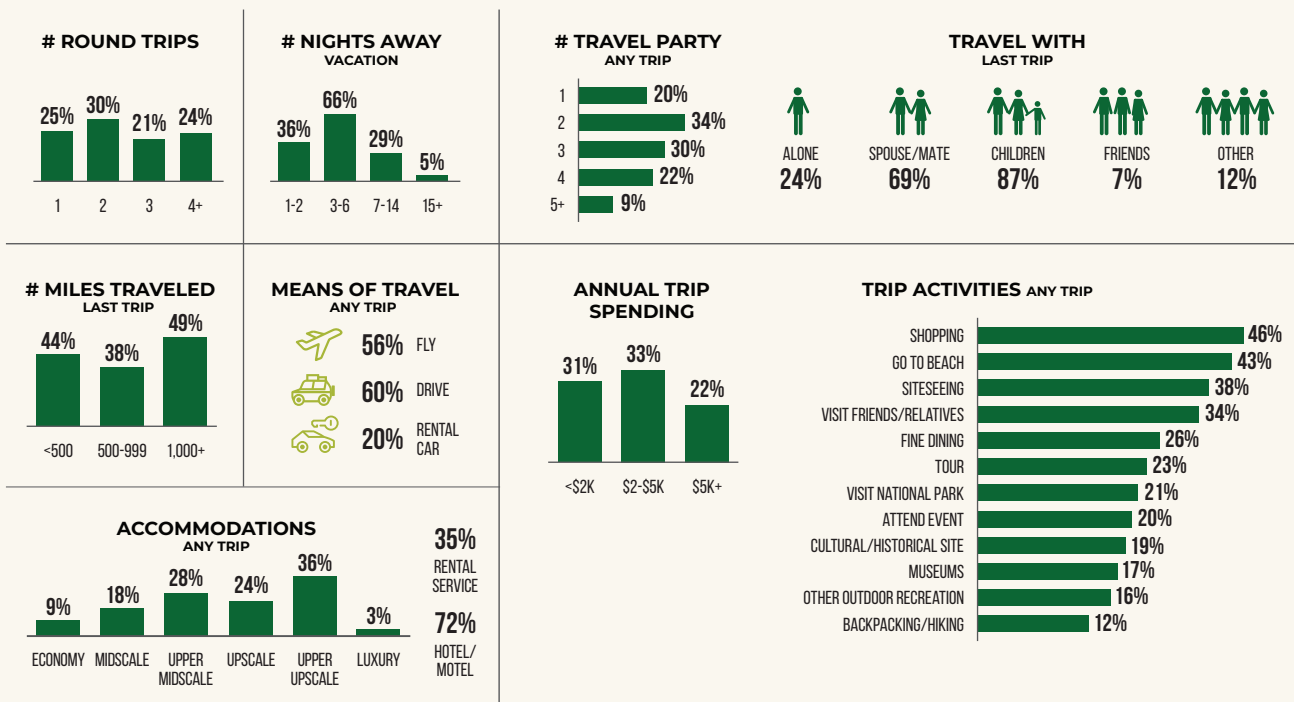
THE SPONTANEOUS TRAVELER FAMILIES: DEMOGRAPHICS



Source: MRI-SIMMONS SPRING 2025 Market-by-Market; Visited California base



THE SPONTANEOUS TRAVELER FAMILIES: TRAVEL PROFILE



GEOGRAPHY

Significant demand is coming from California drive markets, where proximity aligns naturally with shifting travel behavior.

- Core and Lean audiences are concentrated in California DMAs
- 75% of visitors already arrive by car
- Closer-to-home travel trends directly favor destinations like SLO CAL

Fly Markets represent secondary growth opportunities, and visitors from these markets—as well as San Diego—tend to visit more communities strengthening their case for geographic prioritization.

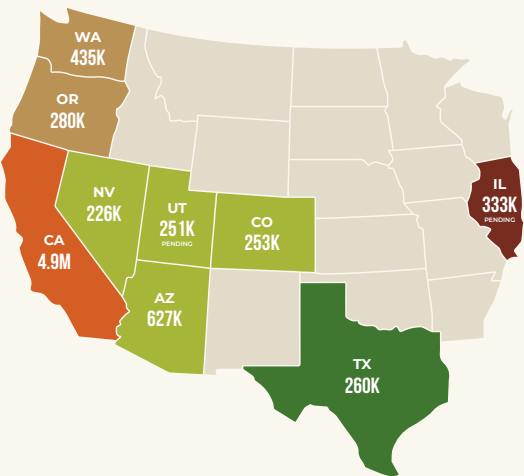
Likelihood to visit was high across measured markets in the 2025 Visitor Profile study, with fly markets showing significant growth in intent from the previous study. San Diego led all measured markets at 53% intent, a 23-point gain, followed by Tier 2 markets. Cross-referencing visitor profile data with year-to-date origination data and likelihood to visit, informs the following geographic approach for FY 27.

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 26 SLO CAL ARRIVALS BY ORIGIN MARKET					
PRIORITY	DESIGNATED MARKET AREA	% OF TOTAL ARRIVALS	% OF AIR ARRIVALS	% OF BUDGET	YOY BUDGET ADJUSTMENT
TIER 1	San Francisco/Oakland/San Jose, CA	72%	3.3%	11.5%	0%
	Los Angeles, CA		4.2%	25%	0%
	Sacramento/Stockton/Modesto, CA		N/A	7%	0%
	San Diego, CA		7.3%	11.5%	+9.5%
TIER 2	Phoenix, AZ	2%	12.4%	9.3%	3%
	Dallas/Fort Worth, TX	1%	3%	12.5%	0%
	Seattle/Tacoma, WA	1%	7.2%	7.5%	+4%
TIER 3	Denver, CO	1%	6.7%	6%	-12%
	Las Vegas, NV	1%	3.7%	4.7%	-8%
	Portland, OR	1%	5.4%	5%	-7%

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

THE SPONTANEOUS TRAVELER: POPULATIONS

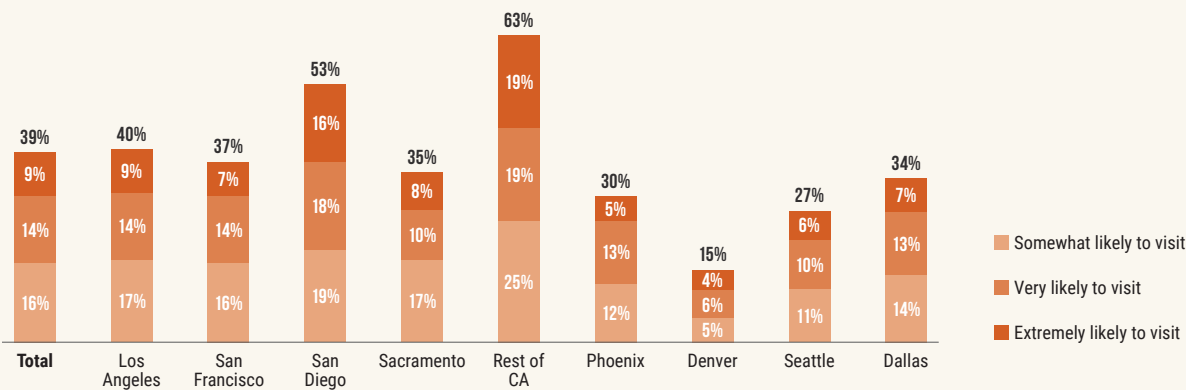


‘Spontaneous Travelers’ are concentrated in the West with 63% across California, Oregon, Washington, Nevada and Arizona, while Utah and Illinois are also being actively tracked as emerging opportunities where additional air service is being pursued. Most of these travelers live in the major markets within each state. Expanding to Colorado and Texas grows the addressable audience by nearly 5%.

KEY MARKETS

LOS ANGELES	2.1M
SAN FRANCISCO	1.4M
SAN DIEGO	413K
SACRAMENTO	505K
REST OF CA	484K

LIKELIHOOD TO VISIT SLO CAL





BRAND STORYTELLING



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 five 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.

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



“THE LAND OF...” CAMPAIGN SET THE FOUNDATION FOR VSC’S BRAND GROWTH AND FUTURE STORYTELLING

BRAND CAMPAIGN LAUNCH

FY 22

Hero Brand campaign launch

HOUSE OF BRANDS

FY 22

Developed suite of House of Brands co-op assets

CROSS VISITATION & FAMILY

FY 23

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



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

“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.

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

SLO CAL CRAFTED

FY 23

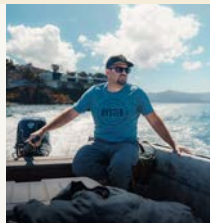
Expanded owned channels for launch in paid program



SUSTAINABILITY

FY 24

WTTC content partnership



LOCAL: MY SLO CAL

FY 24

Local nomenclature campaign launched in service of the BHAG



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.

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-O-ONE

FY 25

Breaking down the basics of wine



SUSTAINABLY SLO CAL

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

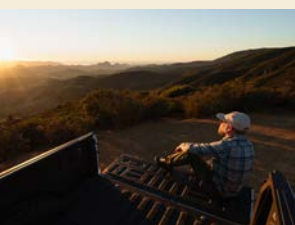
“Sustainably SLO CAL”

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.

TAPPED INTO SLO CAL

FY 26

A SLO CAL beer is made



TAPPED
— INTO —
SLO CAL

URNS WELL TAKEN

FY 26

Brand campaign that celebrates
unplanned moments



URNS
WELL TAKEN
— IN THE LAND OF SLO CAL —

YEAR 5

“Tapped Into SLO CAL”

A five-part video series, “Tapped Into SLO CAL” invites viewers to explore the spirit of San Luis Obispo County through the lens of craft brewing. Created by Visit SLO CAL in collaboration with Firestone Walker Brewing Company, the series follows brewmaster Matt Brynildson on a journey to answer a bold question: can you bottle a place? Along the way, he connects with local culture, from coastal landscapes to winemakers and musicians, gathering inspiration for a one-of-a-kind beer. Blending storytelling with authenticity, the series captures the creativity, community and laid-back charm that define SLO CAL.

YEAR 5

“Turns Well Taken”

A multi-channel campaign, “Turns Well Taken” invites travelers to experience SLO CAL at a pace that encourages spontaneity and discovery. The campaign builds on the success of “The Land Of...” by shifting focus to the visitor journey—celebrating unplanned moments like scenic detours, hidden beaches and local recommendations that become lasting memories. Rooted in ethnographic research, it reflects the brand promise that Life’s Too Beautiful to Rush®. Brought to life across 24 locations over seven shoot days, the campaign captures the freedom, authenticity and joy that define the SLO CAL experience.

In February 2026, Visit SLO CAL (VSC) debuted *"Turns Well Taken,"* the next chapter of the destination's brand storytelling. Born from in-depth ethnographic research conducted in FY 25, the campaign brings to life a strategic insight that emerged again and again from visitor interviews: SLO CAL's unique pace enables spontaneity, giving travelers the freedom to go off script and embrace the unexpected. Building on the brand equity established by *"The Land Of..."*, which achieved ad favorability of 96%, *"Turns Well Taken"* evolves the narrative by shifting the lens to the traveler's own experience.

The campaign celebrates unplanned moments: the sidetrack that leads to an unspoiled beach, the back road that winds through a tucked-away town, the local's recommendation that becomes a memorable discovery. This is a natural evolution of the SLO CAL brand promise of Life's Too Beautiful to Rush® and a direct reflection of the emotional benefit at the heart of the brand architecture: to live in the moment.

The campaign also strategically ladders to Visit California's positioning of the state as "The Ultimate Playground," creating synergy between VSC and Visit California marketing messages while maintaining the distinct personality and pace that set SLO CAL apart.

CAMPAIGN DEVELOPMENT

"Turns Well Taken" came together over 18 months of collaborative effort beginning in mid-2024. Two rounds of ethnographic research provided the foundational insights that informed the creative direction. From there, VSC moved through strategic brief development, integrated campaign concepting and qualitative focus group testing that validated the appeal of messaging around spontaneity, detours and the joy of discovery.

Focus group participants were drawn to the unique pace of SLO CAL, the ease of interaction with locals and the ability to go off script and discover something new—reinforcing the strategic insight that anchors the campaign.

Production took place in fall 2025, spanning seven shoot days across 24 locations and supporting local businesses and tourism partners across the region. The campaign launched on February 2, 2026.



TURNS WELL TAKEN

— IN THE LAND OF SLO CAL —



“TURNS WELL TAKEN” continued

PARTNER COLLABORATION

True to the spirit of radical collaboration that defines VSC’s approach, *“Turns Well Taken”* was made possible through partnership with the region’s tourism businesses and destination partners. Local lodging properties, wineries, restaurants, attractions and communities across all 24 filming locations welcomed the production team, serving as authentic representations of the SLO CAL experience. Like *“The Land Of...”*, *“Turns Well Taken”* includes both Hero and House of Brands assets. VSC worked closely with destination partners to develop co-branded storytelling specific to individual communities, and developed partner toolkits ahead of launch to equip partners with assets and messaging to amplify the campaign through their own channels.



24 LOCATIONS



27 CREW



7 SHOOT DAYS



9 TALENT



SLO CAL BRAND STORYTELLING

PEOPLE

+

PLACE

+

PACE

CROSS-CHANNEL
CAMPAIGNS & CONTENT

HERO BRAND

SLO CAL REGION

1.

HOUSE OF BRANDS

INDIVIDUAL COMMUNITIES



COMMUNITY

WELCOME

EXPERIENCE

PROXIMITY

VARIETY

CULTURE

PEOPLE

+

PLACE

+

PACE

SOCIAL STORYTELLING



“WHERE THE MUSIC TAKES YOU”

New for FY 27

“Where the Music Takes You” is being developed as a new content series that explores the musical identity woven throughout the communities of SLO CAL. With concepting and production beginning in late FY 26, the series will introduce a diverse set of artists and the places that shape them, diving into the people, venues and experiences that define the destination’s cultural fabric.

Each episode will use music and creativity as a lens to tell the story of the county, highlighting the artists, makers and communities that bring SLO CAL to life. Infused with the spirit of spontaneity and discovery central to *“Turns Well Taken,”* the series is designed to position SLO CAL as a culturally rich destination—encouraging overnight stays and deeper exploration.

As music tourism continues to rise globally—driven by concerts, festivals and artist residencies—travelers are increasingly choosing destinations based on cultural and musical experiences. With the global music tourism market projected to exceed \$400 billion by 2032, the series taps into this momentum, positioning SLO CAL as a place where music and travel intersect in meaningful ways.

As development continues into FY 27 ahead of its debut, the series will expand its reach across the region, capturing new voices, communities and cultural moments to create a more complete and compelling portrait of SLO CAL—one that resonates with travelers seeking authenticity, connection and experiences rooted in place.

“SLO CAL CRAFTED: CULINARY”

New for FY 27

Food is one of the most universal dimensions of travel. The meals we share, the flavors we discover and the moments we spend around a table are often the memories that stay with us long after we return home. In SLO CAL, those moments are made possible by a dedicated community of growers, farmers and producers whose work has quietly shaped an emerging culinary destination gaining recognition across California.

“SLO CAL Crafted: Culinary” is a new content series that puts those people at the center, celebrating the agricultural community behind the region’s food scene and the land that makes it possible. From the diverse microclimates that allow a wide range of ingredients to thrive, to the lesser-known discoveries that surprise even frequent visitors, this series tells a soil-to-spoon and tree-to-table story of people, place and place rooted in the farms, landscapes and flavors of SLO CAL.

The series explores the many dimensions that distinguish SLO CAL’s food scene—from the natural partnership between the region’s produce and its wine country, to a growing commitment to regenerative farming and sustainable food practices. By telling the stories of the growers and producers who enable the experiences travelers seek out in the region, “SLO CAL Crafted: Culinary” deepens understanding of the destination and builds more meaningful connection to the people, land and all SLO CAL has to offer.



FY 27 END TO END MARKETING

The FY 27 program of work is designed to drive demand and will be executed using an omnichannel strategy across paid, owned and earned channels. The budget and program plan allow for flexibility and the ability to capture opportunity, reinforcing SLO CAL as a destination where Life's Too Beautiful to Rush® and inviting visitors to embrace the spontaneity and discovery that define the region.

The “Turns Well Taken” brand campaign will serve as the foundation for paid media across Hero and House of Brands assets throughout the fiscal year. Complementing the brand campaign, Visit SLO CAL’s (VSC) content series portfolio continues to expand. “*Tapped into SLO CAL*,” which launched in April 2026, reinforces the nomenclature strategy by exploring what SLO CAL tastes, smells and feels like through the lens of local makers. “*Where the Music Takes You*,” launching in summer 2026, explores the region’s cultural and live music scene—supporting longer stays and deeper engagement with the destination. “*SLO CAL Crafted: Culinary*” brings the brand to life by highlighting the people, agriculture and landscapes behind the region’s food scene, connecting travelers to SLO CAL through authentic soil-to-table stories of place, flavor and community. These series extend the brand platform through social and earned channels while adding dimension to the SLO CAL story.

Existing content pillars including—“*SLO CAL Crafted*,” “*Sustainably SLO CAL*,” “*Unpacking SLO CAL*” and “*Wine-O-One*”—will continue to anchor the content mix, supporting a diverse, year-round program that drives cross-visitation, partner storytelling and the region’s key demand drivers.



NEW FOR FY 27

Given the growth of the family segment, VSC will expand “Turns Well Taken” to include a new family campaign layer. Centered on the family travel experience, these assets will feature family talent as the storytellers and be supported by paid media targeting family travelers.

VSC is also exploring the development of culinary-specific content in addition to the new content series, designed to showcase the region’s agritourism experiences, farm-to-table dining, local food systems and culinary events and festivals.

Also, VSC plans to bring the spirit of the Central Coast to Dallas through a multi-day showcase designed to connect media and meeting planners with the stories, flavors and experiences that define SLO CAL. Produced in partnership with regional destination partners, the event gives attendees the opportunity to meet the people who shape the region and explore the destination firsthand. The showcase drives inspiration for media coverage, meeting planner partnerships and overall travel to the region.

END TO END MARKETING OKRs

OBJECTIVE	
Amplify and steward the SLO CAL brand	
STRATEGIES	KEY RESULTS
Develop and execute demand-driving marketing program across opportunity audiences	• Develop and implement a strategy in alignment with Visitor Profile Study to address opportunity audiences by July 2026
Leverage full funnel storytelling and content to drive consideration	• Complete meetings focused research by August 2026, to develop the group strategy and brand architecture by October 2026 • Create updated “My SLO CAL” video to support nomenclature initiative and TMD renewal by October 2026
Continue to build adoption of SLO CAL nomenclature	• Develop family focused “Turns Well Taken” asset by December 2026
Align House of Brands activity to inspire cross-visitation	• Initiate the development of a “SLO CAL Crafted: Culinary” focused end-to-end content series by June 2027 • Expand the “Where The Music Takes You” end-to-end content series by June 2027



PAID MEDIA



FY 27 PAID MEDIA OBJECTIVES & STRATEGIES



OBJECTIVES

01

Continue to drive awareness and subsequent demand to visit SLO CAL

02

Drive consideration and engagement with SLO CAL brand content

03

Encourage cross-visitation of SLO CAL using House of Brands assets

04

Continue to drive adoption of local nomenclature



STRATEGIES

- Maintain a layered media approach to reach opportunity traveler segments across a diverse mix of media channels
- Prioritize 'The Spontaneous Traveler,' leveraging new targeting capabilities to reach the audience most likely to connect with *"Turns Well Taken"*
- Prioritize first-time visitors within Core, Lean and Swing segments for incremental growth while maintaining contact with past visitors to drive repeat visitation
- Focus on drive markets and reprioritize fly markets, creating market-specific media plans to capture the most receptive travelers

FY 27 PAID MEDIA MIX & BUDGET ALLOCATION



The FY 27 paid media mix will capitalize on shifting media consumption habits to meet 'Spontaneous Travelers' where they spend the most time. 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 26 PAID MEDIA ENGAGEMENT

154M
TOTAL
IMPRESSIONS

74%
VIDEO
COMPLETES

36M
VIDEO
VIEWS

161.5k
HOURS SPENT WITH
SLO CAL CONTENT

495k
TOTAL
SESSIONS

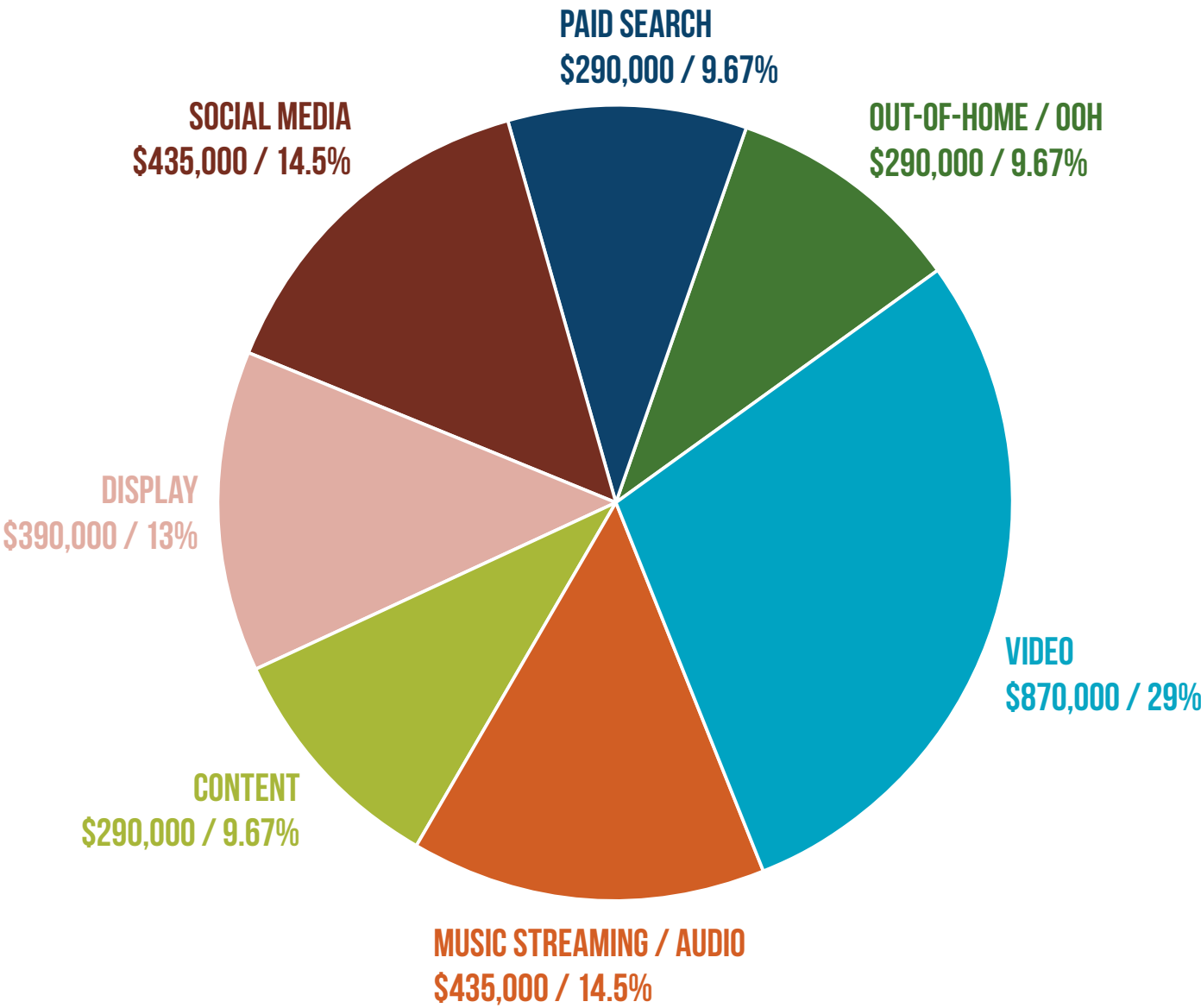
0:29
AED

96%
CTR

891.5k
TOTAL CLICKS

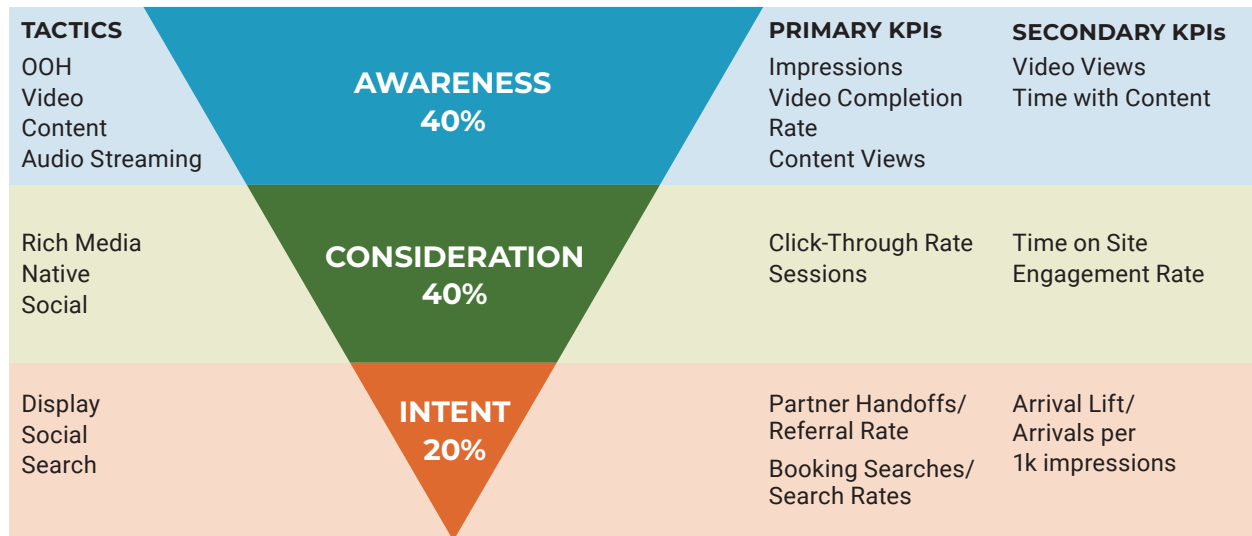


FY 27 PAID MEDIA BUDGET: \$3,000,000



FY 27 PAID MEDIA MEASUREMENT

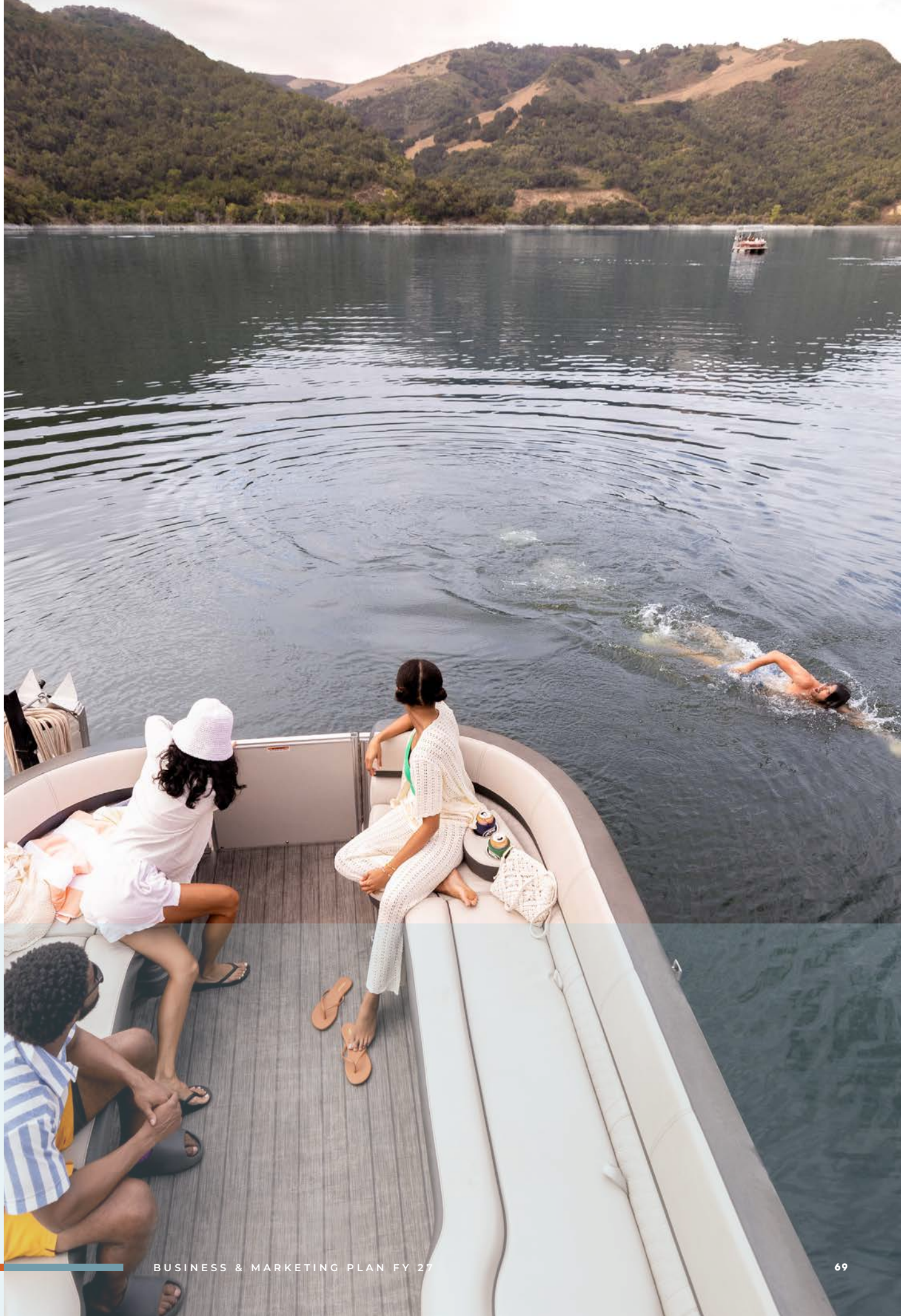
Each component of the paid media plan has a specific purpose and Visit SLO CAL will measure and optimize performance according to clearly defined Key Performance Indicators (KPIs).



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) will continue to refine its owned media ecosystem to more effectively inspire, inform and convert prospective travelers while delivering measurable value to partners. As consumer behavior, search and platform dynamics continue to evolve, FY 27 will focus on strengthening the performance, integration and strategic role of owned channels—including the website, email marketing, social media and Customer Relations Management (CRM) systems.

With the launch of *“Turns Well Taken,”* owned channels will extend campaign storytelling and reinforce SLO CAL’s positioning as a destination where spontaneity and discovery shape the visitor experience. Content and user journeys will be refined to encourage exploration, deeper engagement and more meaningful interaction with destination partners.

FY 27 marks the beginning of a deliberate, year-long transition of VSC’s core marketing technology infrastructure. Following a competitive RFP process, VSC will launch implementation of a new web technology stack—encompassing the website, email marketing platform and CRM—with a full transition targeted for July 1, 2027. This investment will reduce vendor dependency, increase organizational ownership of digital assets and position VSC’s owned channels for long-term performance and flexibility. By improving user experience, strengthening pathways to partners and better aligning systems and content, owned media will play a central role in driving destination demand and supporting partner value in the long-term.

OWNED MEDIA continued

WEBSITE

OBJECTIVES	
Define clear success criteria for slocal.com in a rapidly evolving digital and search environment	
Improve the website's effectiveness as a trip inspiration and exploration platform	
Strengthen the role of the website within VSC's broader owned media ecosystem	
Transition VSC's core digital infrastructure to a modern, future-ready technology stack	
STRATEGIES	KEY RESULTS
• Establish what success looks like for slocal.com, including its role in an environment shaped by AI-driven search, changing user behavior and evolving attribution models • Refine site architecture, content strategy and user flows to better support trip planning and deeper engagement • Enhance key trip planning pathways—including itineraries, maps and content hubs—to guide users through the discovery process • Align website experience with <i>"Turns Well Taken"</i> storytelling, reinforcing themes of spontaneity, discovery and self-guided exploration • Identify and prioritize incremental enhancements that improve usability, content performance and cross-channel integration • Work with a selected vendor to support planning, development and implementation of a new website, email marketing platform, and CRM system through FY 27	• Establish and document a new website measurement framework, defining success metrics and KPIs aligned with evolving search behavior and user expectations by December 31, 2026 • Increase engagement with key trip inspiration content—including itineraries, maps and high-value pages—by 5% year-over-year by June 30, 2027 • Complete the full transition to a new website, email marketing client and CRM technology stack, with the new platform live and prior vendor contracts fully sunset by June 30, 2027

EMAIL MARKETING

OBJECTIVES

- Maintain and improve email performance as a core owned channel for inspiration, engagement and conversion
- Strengthen audience quality, relevance, and lifecycle engagement across the subscriber base
- Prepare email systems, audiences, and data structures for a successful platform and CRM transition

STRATEGIES

- Continuously test and optimize subject lines, creative formats and send strategies to improve engagement and conversion
- Align email content with “Turns Well Taken” storytelling, incorporating themes of spontaneity, discovery and traveler-led exploration
- Define automated email journeys across key lifecycle stages, including welcome, trip planning and re-engagement
- Optimize email capture strategies across owned channels to support list growth and conversion
- Strengthen email list health and data integrity through ongoing list hygiene, re-engagement efforts and standardized subscriber data practices to ensure a clean foundation for CRM and platform migration

KEY RESULTS

- Complete audit and documentation of core email journeys in preparation for CRM and platform migration by December 31, 2026
- Establish revised automated lifecycle email journeys across key stages (welcome, trip planning, re-engagement) by March 31, 2027
- Improve data quality and deliverability by completing subscriber list hygiene before migrating to the new platform by June 30, 2027
- Maintain a 3-5% year-over-year increase in email click-through rate by June 30, 2027
- Ensure migration-ready audience structure and standardized subscriber data framework in place by June 30, 2027

OWNED MEDIA continued

SOCIAL MEDIA

Visit SLO CAL's social channels have become a central storytelling tool for the destination—an engaged space that brings together visitors, locals and partners around a shared sense of place. In FY 27, that foundation enters a new phase.

Social Strategy 2.0 marks an evolution rather than a reinvention. Building on what has already been established, it sharpens the strategic focus—ensuring every piece of content is purposeful, targeted and aligned with the people most likely to visit, stay and return to SLO CAL.

At the heart of this evolution is a shift in how social is understood. No longer simply a channel for inspiration, social now functions as a discovery engine, a research tool and a space where travel decisions are actively shaped. VSC's approach responds to this directly—moving from broad aspiration toward content that entertains, informs and earns its place in an increasingly fragmented feed. Storytelling is more intentional, messaging is more closely aligned to the brand pillars of people, place and pace, and the role of social in supporting overnight stays, cross-visitation and regional dispersal is clearly defined.

This strategic evolution ensures that VSC's social presence continues to do what has always defined it—celebrating the destination authentically while building the reach, relevance and long-term impact that a destination focused on growth demands.

SOCIAL MEDIA

OBJECTIVES	
Implement Social Strategy 2.0 to deepen intentionality, quality and strategic alignment of VSC’s social presence across all platforms Align social storytelling with the “Turns Well Taken” brand approach, ensuring campaign narratives are consistently reflected through owned social tactics and messaging Increase the visibility of the SLO CAL region through a mix of always-on and campaign-driven content, prioritizing meaningful engagement over volume and ensuring content highlights the region as welcoming to all audiences Strengthen the destination partner ecosystem through a structured partnership approach that ensures equitable, collaborative and strategically aligned representation across the county	
STRATEGIES	KEY RESULTS
• Implement the evolved messaging matrix rooted in people, place and pace, ensuring all content aligns with VSC’s strategic storytelling pillars, and continues to develop owned content series as key vehicles for destination awareness, cultural connection and demand generation • Develop social-first content hooks and formats that prioritize depth, authenticity and meaningful engagement, balancing always-on storytelling with campaign moments across all core platforms, with equitable and collaborative representation of destination partners woven throughout • Optimize content for social search and discovery, integrating keyword-rich captions, location-specific language and on-screen text to ensure SLO CAL surfaces natively across platform search and AI-driven recommendation environments • Use AI tools responsibly to support caption development, keyword optimization and reporting efficiencies, allowing more focus on storytelling and community engagement	• Maintain a consistent posting cadence of 14 posts monthly across all core platforms, ensuring a balanced ratio of campaign, always-on and partner content throughout the year • Embed “Turns Well Taken” messaging across owned social channels through a minimum of eight dedicated posts and assets that bring the brand approach to life through storytelling by June 30, 2027 • Launch the structured destination partner collaboration framework by July 31, 2026 and deliver a minimum of two collaborative content opportunities per month with destination partners across the county by June 30, 2027 • Execute a twice-yearly social summit to align destination partners, share platform insights and inspire collaborative storytelling opportunities across the county by June 30, 2027



EARNED MEDIA



Visit SLO CAL (VSC) leads external communications and media relations to drive demand for the entire region, working closely with its domestic PR and international social media agencies, as well as Visit California. Earned media efforts focus on securing third-party endorsements of the region's appeal and offerings from top-tier journalists and influencers through partnerships with local destination partners. VSC prioritizes diversity and inclusivity in all storytelling, highlighting SLO CAL's distinct character and expanding regional awareness through curated media touchpoints, media FAM (familiarization) trips. These efforts amplify global awareness of the destination while strategically aligning with paid and owned media efforts.

OBJECTIVES

Amplify and steward the SLO CAL brand by maintaining engagement with domestic, regional and international media to generate narrative-led earned media coverage through FAMs and strategic campaigns

Strengthen local media relationships to drive authentic local media coverage, while continuing to promote the SLO CAL nomenclature and the spirit of people, place and pace

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

Demonstrate the value of tourism across the region through consistent, locally grounded coverage

STRATEGIES

- Cultivate media relationships to secure earned media coverage across domestic, local and international outlets, with an emphasis on key fly/drive markets and the positive impact of tourism in SLO CAL
- Align with owned and paid efforts to develop content approach rooted in local voices building experiences that showcase the people and communities for FAM trips and media pitching opportunities
- Offer destination partners opportunities for networking, educational sessions and collaboration on FAM trips and co-op initiatives
- Enhance international media efforts in partnership with Visit California to host international media and influencers in SLO CAL through authentic, story-driven experiences, supporting increased visitation and length of stay

KEY RESULTS

- Develop a local media strategy to amplify SLO CAL's nomenclature and positive impact by September 2026
- Develop a targeted influencer strategy by December 2026
- Execute two out-of-market media co-op opportunities by May 31, 2027
- Secure 20 local media stories highlighting tourism's positive impact in SLO CAL by June 30, 2027
- Host six domestic and two international FAM trips by June 30, 2027
- Host four partner mixers by June 30, 2027



PARTNERSHIPS & EVENTS



PHOTO COURTESY OF WSL

Visit SLO CAL (VSC) continues to strengthen the local tourism industry by fostering meaningful connections with partners and creating opportunities for collaboration through marketing programs and events. Building on existing networking and event programs, VSC will create more strategic opportunities for partner collaboration and learning. VSC will also focus on communicating the value of its initiatives more effectively to deepen partner engagement. Continued investment in engagement and collaboration keeps partnership central to driving demand and supporting growth across the region.

OBJECTIVES

Share industry knowledge, insights and best practices with investors, partners and stakeholders

Demonstrate the value VSC provides to its partners, investors and stakeholders

Use partnerships and collaborative opportunities to expand visibility and demand for SLO CAL

STRATEGIES

- Create educational and networking opportunities that strengthen collaboration across the tourism community
- Increase awareness of how VSC's programs and initiatives benefit destination partners
- Leverage event partnerships to expand brand presence, drive visitation and increase demand for SLO CAL
- Encourage adoption of SLO CAL nomenclature strategy with partners to amplify the SLO CAL brand

KEY RESULTS

- Produce the annual SLO CAL Summit by November 30, 2026
- Execute marketing and brand activations at two sponsored events and provide in-kind marketing support to four partner events by June 30, 2027
- Identify partnership opportunity and develop a SLO CAL nomenclature product by June 30, 2027
- Develop and execute a cross-department strategy for partner networking and education events by July 30, 2026, with four completed by June 30, 2027
- Maintain partner satisfaction based on the established baseline measured in the FY 26 NPS survey by June 30, 2027
- Implement a process that reports on the benefits partners received through VSC's marketing initiatives by June 30, 2027



SALES





Visit SLO CAL (VSC) has made progress in strengthening its presence within both the travel trade and group markets. Market research conducted in 2022 as a part of the development of the VSC Sales Strategy, identified the key barrier to international growth as being the limited awareness among hotel and attraction partners of the travel trade distribution system. As a result, many SLO CAL properties were not available through global wholesalers or direct tour operator contracts, limiting the region's ability to convert international demand into room nights.

TRAVEL TRADE

Over the past several years, VSC has focused on education and industry engagement to address the gap identified in the 2022 Market Research. Through targeted outreach with lodging partners, tour operators and travel advisors, SLO CAL has improved connectivity within international booking channels and increased participation from local hotels and attractions.

In FY 27, the focus will shift toward driving consumer awareness and expanding trade engagement, particularly in the United Kingdom. Joint marketing initiatives and increased tour operator engagement will build on the renewed interest following the reopening of Highway 1 in winter 2026 and in strategic collaboration with regional destination partners.

MEETINGS / GROUP BUSINESS

Within the group segment, VSC has made progress increasing awareness among meeting planners through participation in industry trade shows, engagement with organizations such as Meeting Professionals International (MPI) and Society for Incentive Travel Excellence Southern California (SITE SoCal) and the hosting of its first meeting planner familiarization (FAM) tour in the summer of 2025.

In FY 27, VSC will expand on this foundation by conducting research to further refine its meetings and group strategy to guide targeted media investments in the meeting planner space. Outreach will expand into key drive and fly markets to strengthen relationships with planners and increase awareness of SLO CAL as a meetings destination.

Through collaboration with destination partners and lodging investors, these efforts will increase awareness and generate more meeting and group Requests For Proposals (RFPs) for San Luis Obispo County. Priority growth segments include corporate groups, board retreats, Social, Military, Educational, Religious and Fraternal (SMERF) groups, association and industries aligned with the region's economic strengths—including aerospace and agriculture.



TRAVEL TRADE

OBJECTIVES

Build and nurture relationships with international and domestic tour operators

Strengthen and expand awareness and visitation from key international markets

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

STRATEGIES

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

KEY RESULTS

- Host UK Agent FAM by November 30, 2026
- Attend a minimum of three industry trade shows or events by June 30, 2027
 - Brand USA Travel Week & twice-yearly UK Sales Mission
 - IPW
 - American Bus Association Marketplace
 - Visit California Reverse Sales Mission
- Execute two digital marketing campaigns to generate consumer awareness and encourage international bookings by June 30, 2027

MEETING & GROUP

OBJECTIVES	
Generate qualified group sales leads Increase awareness of the destination among meeting planners Position SLO CAL as a compelling destination for meetings and conferences	
STRATEGIES	KEY RESULTS
• Refine SLO CAL's group value proposition and strategy • Build partnerships with meeting planners and grow meeting planner database • Provide engagement opportunities between lodging investors, partners and meeting planners • Identify trade shows and conferences where VSC can engage as an exhibitor to increase lead generation • Participate in a minimum of one Visit California meetings co-op to expand exposure to third party meeting planners	• Complete qualitative research in summer 2026 to inform a refined meetings and groups strategy, as well as brand architecture development • Host a partner-supported road show to engage with meeting planners in a key fly market by May 31, 2027 • Participate in a minimum of three industry conferences or trade shows by June 30, 2027 • North Star Meetings: Destination California • IMEX in cooperation with Visit California • Visit California West Coast Roadshow (Fall) • Generate 32 sales leads by June 30, 2027

SALES PARTNER ENGAGEMENT

OBJECTIVES	
Strengthen engagement between VSC and its lodging investors, partners and stakeholders to expand countywide sales efforts	
STRATEGIES	KEY RESULTS
• Engage with lodging investors, partners and stakeholders to identify regional, industry and property-specific challenges, strengths and opportunities	• Engage a minimum of two destination partners in the meetings segment research by August 31, 2026 • Secure participation from a minimum of three lodging investors or partners in VSC's Dallas road-show co-op by December 31, 2026 • Host a quarterly meeting with hotel sales professionals to identify new collaboration opportunities by June 30, 2027



FILM SLO CAL



Film SLO CAL serves as the San Luis Obispo County Film Commission, focused on strengthening the region’s position as a production-friendly destination. In FY 27, efforts will center on enhancing the quality, improving the accessibility and depth of location resources while continuing to build meaningful relationships with location scouts, producers and industry professionals.

By improving how SLO CAL’s locations are presented and experienced, Film SLO CAL will make it easier for decision-makers to evaluate, envision and ultimately select the region for production. These efforts will be supported by targeted outreach, in-market experiences and ongoing collaboration with local partners to ensure an efficient and supportive filming environment.

OBJECTIVES	
Improve the accessibility, depth and quality of SLO CAL’s location assets and resources	
Strengthen relationships with location scouts, producers and industry decision-makers	
Demonstrate the value of Film SLO CAL’s work to local stakeholders, partners and the broader community	
STRATEGIES	KEY RESULTS
• Refine digital tools and workflows—including the Film SLO CAL microsite and location galleries—to improve usability and speed of access to location information • Conduct targeted outreach to location scouts and industry professionals to build awareness and strengthen relationships • Deliver in-market experiences that showcase the diversity, accessibility and production readiness of SLO CAL locations • Collaborate with local jurisdictions and permitting partners to ensure clear, consistent and film-friendly processes	• Enhance the Film SLO CAL location library with updated imagery and expanded location details by December 15, 2026 • Improve microsite usability and organization to better support scout research and inquiry workflows by March 15, 2027 • Deliver a location FAM tour for at least five film scouts and an educational mixer for permitting partners at the SLO International Film Festival by April 30, 2027 • Conduct targeted outreach to at least 25 qualified location scouts or production contacts to expand Film SLO CAL’s industry relationships by June 30, 2027

EXPERIENCE SLO CAL 2050

Launched in 2018, Experience SLO CAL 2050 (ESC 2050) has served as the north star for Visit SLO CAL's (VSC) efforts to protect, enhance and improve the region's long-term quality of life, visitor experience and economic prosperity.

As part of Strategic Direction 2029 (SD 2029), VSC will continue to advance ESC 2050 initiatives while beginning the process of updating the destination management strategy to reflect current industry trends and community needs.

ITEMS VISIT SLO CAL WILL ADVANCE IN FY 27

BIKE TOURISM

VSC will focus on promoting a bike-friendly SLO CAL by partnering with cycling advocacy groups and developing dedicated marketing strategies.

EXPERIENCE INCUBATOR

Building on the "Crafted Connection Series," VSC will broaden its educational offerings to provide expanded opportunities for partners to network, hear from industry leaders and enhance their offerings to improve the visitor experience.

EXPERIENCE SLO CAL 2.0

VSC will create an RFP and framework to update the original ESC 2050 plan, addressing the current needs of SLO CAL's visitors and residents.





ADVOCACY

Visit SLO CAL's (VSC) Advocacy Program represents the voice of the SLO CAL tourism industry in decisions that impact the region's economy, community and visitor experience. Working in collaboration with industry partners, local stakeholders and state and national travel organizations, VSC supports policies and initiatives that encourage responsible tourism growth and strengthen the region's quality of life.

OBJECTIVES

Ensure that the vitality of SLO CAL's tourism industry is reflected in local, state and national decision-making

Support the renewal of the Tourism Marketing District (TMD) through stakeholder engagement and education

Expand VSC's involvement in industry-related advocacy events and working groups

STRATEGIES

- Advocate for the economic health of SLO CAL's tourism sector by engaging with policymakers and industry groups
- Implement an engagement plan to educate investors, partners and stakeholders about the impact of the TMD
- Develop a strategy for increasing VSC's participation in industry-related advocacy events and working groups

KEY RESULTS

- Meet with all SLO CAL city council members and Board of Supervisors by December 31, 2026
- Participate in at least three state and national tourism advocacy events by May 1, 2027
- Participate in at least three new industry-related advisory groups or committees by June 30, 2027

ENGAGE WITH VISIT SLO CAL

Visit SLO CAL (VSC) invites lodging investors and partners to tap into VSC's resources by engaging across the organization in areas that are valuable to them.

SALES

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.

CONTENT CALLS

The VSC sales team regularly seeks out information about what's new within the county for its travel trade and meeting planner newsletters. Respond to content calls via VSC's weekly partner newsletter, This Week in SLO CAL (TWISC), or reach out to sales@slocal.com to submit your content to be considered.

MARKETING

VSC offers a variety of marketing opportunities to fit partners' specific goals. For more information on the below opportunities, email marketing@slocal.com.

OFFICIAL VISITOR MAGAZINE

Lodging investors and non-lodging partners can advertise in the annual VSC Official Visitor Magazine. Copies are distributed inside and outside of the county. Production is expected to begin in July 2026.

CONTENT CALLS

Throughout the year, VSC actively seeks content, imagery and videos to feature in current promotions. Stay current with VSC content needs via SLO CAL's weekly industry email, TWISC. To subscribe, go to slocal.com/partners.

SOCIAL MEDIA CROSS-PROMOTION

VSC has an engaged social media following. To get content considered for sharing on VSC's Instagram stories, make sure to tag @slocal.

EVENT SUPPORT

VSC provides a variety of event marketing support for tourism-related events in San Luis Obispo County. To submit an event to the VSC digital event calendar, go to slocal.com/submit-your-event.

PUBLIC RELATIONS

VSC collaborates with domestic and international journalists to develop editorial coverage that positions SLO CAL as a compelling travel and tourism destination. In partnership with organizations such as Visit California and through participation in media missions and industry events, VSC shares SLO CAL's story with key media in drive and fly markets. Through media FAM tours, VSC also provides investors and partners the opportunity to offer discounted or complimentary experiences, increasing the likelihood of inclusion in media coverage and supporting story development. For more information, visit slocal.com/media or contact 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 primary objective of generating earned media coverage. Investors and partners are invited to host visiting journalists at their establishments to showcase their offerings and gain valuable media exposure.

MEDIA PITCHES & LEADS

Media opportunities and story leads are shared through the weekly partnership newsletter TWISC. Partners may respond to relevant media requests and collaborate on story development. Leads are sourced through VSC's domestic PR agency as well as through partnerships with Visit California. To subscribe to TWISC, visit slocal.com/partners.

FILM SLO CAL

Film SLO CAL is a department of VSC and serves as the official film commission for San Luis Obispo County, making it the primary point of contact for film production in SLO CAL. Anyone interested in being considered for directory listings for film locations, crew or talent can submit their information at filmslocal.com or contact film@slocal.com.

FILM SCOUT FAM TOURS

Film SLO CAL hosts film industry professionals and location scouts on an annual group FAM tour in April to showcase filming locations throughout SLO CAL and position the region as a production-friendly filming destination. Anyone interested in showcasing their venue or providing an experience during the tour are encouraged to contact 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 Smith Travel Research (STR), visitor volume and Business Intelligence Reports are made available to lodging investors, partners and stakeholders through SLO CAL Connection, visit slocal.com/partners/slo-cal-connection.

BUSINESS INTELLIGENCE REPORTS / MONTHLY

VSC has partnered with Tourism Economics to offer a dedicated 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 benchmark how the travel and tourism industry is performing across the region.

COMMUNITY BENCHMARK WINE INDUSTRY REPORT / MONTHLY

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

PARTNERSHIP

Visit SLO CAL partners with local tourism-facing businesses to promote the destination and attract visitors. As a partner, your business can be featured on slocal.com and considered for marketing opportunities at no cost. Through the SLO CAL Connection portal, partners can manage their listing, add deals and events, access tourism research and respond to media and sales leads. Learn more at slocal.com/partners or contact partnership@slocal.com.

"SLO CAL CRAFTED" CERTIFICATION

"SLO CAL Crafted" highlights the local artisans, growers and creators who bring the spirit of SLO CAL to life through products made within the region. Developed by VSC, this program showcases certified businesses across its marketing initiatives, inspiring travelers to discover authentic, locally made experiences. To see if a business qualifies, submit the certification form at slocal.com/partners or contact partnership@slocal.com.

SLO CAL WELCOME

SLO CAL Welcome is a free, hospitality-focused customer service training program designed for the region's hospitality and tourism industry. Participants gain practical skills in communication, problem-solving and creating positive guest experiences while learning more about SLO CAL and what the region has to offer. To learn more, visit slocal.com/partners/welcome.







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