

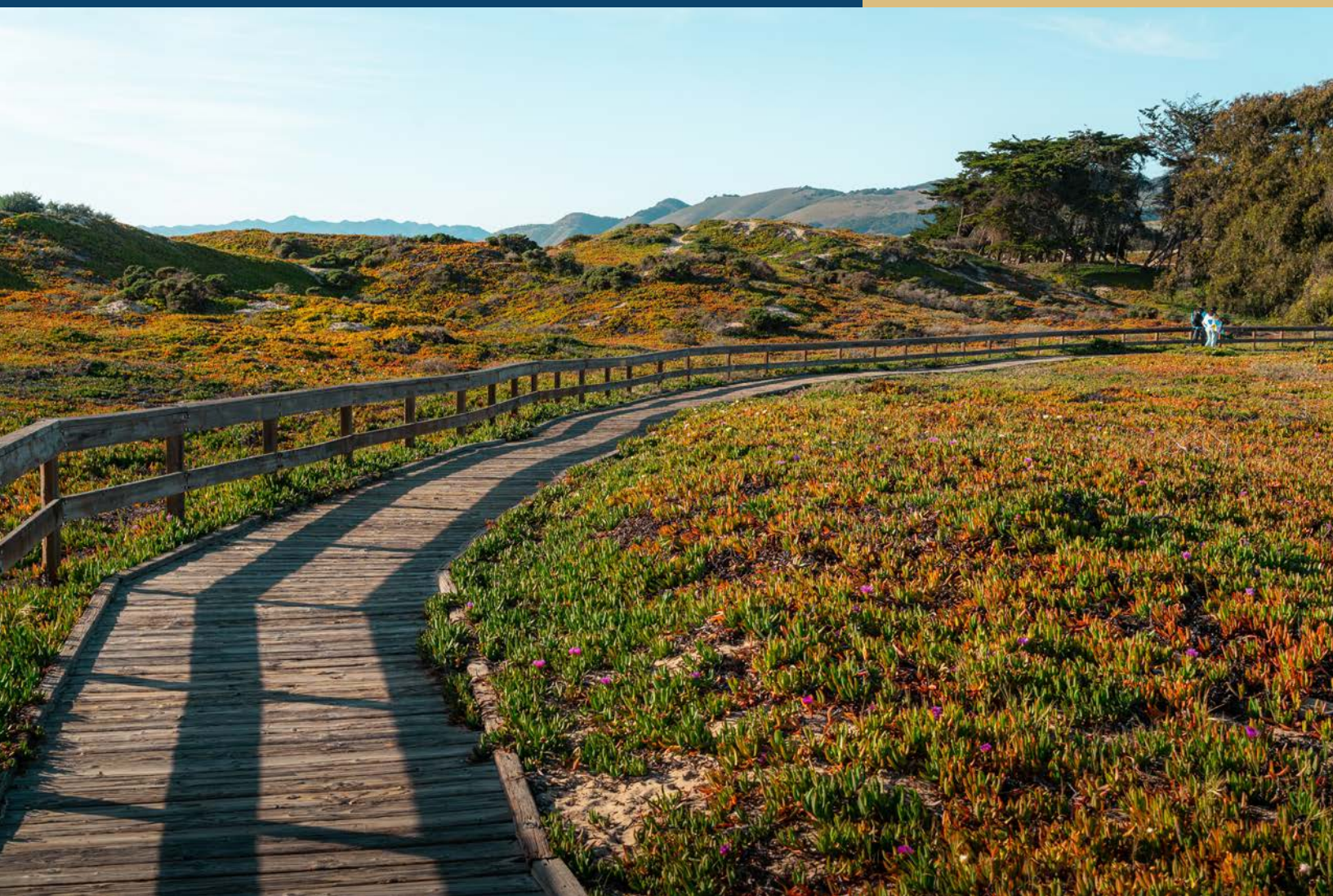


**FY
24**

ANNUAL REPORT



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LETTER FROM THE PRESIDENT & CEO

Dear Visit SLO CAL Investors, Partners & Stakeholders,



During FY 24, the SLO CAL region continued to flourish as a leader in tourism, setting new records and contributing over \$2.32 billion to our local economy. This impressive milestone is a testament to the appeal of our region and the collective efforts of all our SLO CAL communities, investors, partners and stakeholders.

Our success was driven by teamwork and radical collaboration. We worked together to elevate the SLO CAL brand through strategic initiatives and meaningful partnerships. The House of Brands marketing strategy yielded outstanding results, with 97% of travelers in key markets expressing favorable views of our campaign. This success laid the foundation for a substantial \$3.3 million advertising buy aimed at increasing visitation and highlighting our region's unique offerings.

To reinforce our commitment to stewardship, we conducted a Resident Sentiment Study, which explored community members' attitudes and perceptions regarding local tourism and resident quality of life. The findings demonstrated strong support for tourism, with nearly 75% of residents recognizing its importance to SLO CAL's future. Additionally, 66.2% of residents believe that tourism enhances their community, a sentiment that surpasses the state-level average of 46.7% for the industry.

In collaboration with San Luis Obispo County Regional Airport (SBP), we introduced a refreshed logo and brand guidelines for the airport, marking a new era of identity. Together, we celebrated a record number of arrivals, driven by the launch of new seasonal service to Las Vegas and the expansion of second daily flights to Dallas, Los Angeles and San Diego.

To increase local adoption of the SLO CAL nomenclature, we launched the "My SLO CAL" campaign. The colorful campaign features the genuine voices of local residents sharing their deep love for the region. Designed to strengthen community bonds and promote the use of "SLO CAL" as the region's identity, it was widely distributed across local media channels, with the goal of uniting the community under this shared moniker.

As FY 24 comes to a close, let us continue to embrace the values of stewardship, authenticity, inclusion, excellence and future focus that define Visit SLO CAL. Our shared vision of becoming the top destination for visitors from around the world is within reach, thanks to the steadfast dedication and support of everyone involved with Visit SLO CAL.

Together, we are confident that we will achieve even greater success in the coming year.

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

Cathy Cartier

President & CEO, Visit SLO CAL

BOARD, COMMITTEES & TEAM

BOARD OF DIRECTORS

MARK EADS

Chair | Embassy Suites | San Luis Obispo
Elected At-Large Seat (— June 2025)

AMAR SOHI

Vice Chair | Holiday Inn Express Hotel & Suites
Atascadero
Appointed Atascadero Seat (— June 2026)

AARON GRAVES

Past Chair | EverlyGrove Hotel Brokers
Unincorporated Area
Elected At-Large Seat (— June 2026)

HEMANT PATEL

Treasurer | 805 Hospitality | Morro Bay | Paso Robles
San Luis Obispo | Unincorporated Area
Appointed Morro Bay Seat (— June 2026)

CLINT PEARCE

Secretary | Madonna Enterprises | Atascadero
San Luis Obispo
Appointed SLO TBID Seat (— June 2025)

JEDIDIAH BICKEL

SeaCrest OceanFront Hotel | Pismo Beach
Appointed Pismo Beach Seat (— June 2024)

BRYAN BONELLI

Paso Robles Vacation Rentals | Paso Robles
Elected Designated Vacation Rental Seat
(— June 2025)

JIM HAMILTON

County of San Luis Obispo
Appointed County At-Large Seat (— June 2026)

TONI LEGRAS-PRICE

Beachside Rentals | Unincorporated Area
Appointed Unincorporated Area Seat
(— June 2025)

HAMISH MARSHALL

AuzCo Developments | San Luis Obispo
Elected At-Large Seat (— June 2025)

AMIT PATEL

New Horizon Associates | Morro Bay | Pismo Beach
San Luis Obispo
Elected At-Large Seat (— June 2024)

NIPOOL PATEL

Lamplighter Inn & Suites | San Luis Obispo
Elected At-Large Seat (— June 2025)

PRAGNA PATEL-MUELLER

Samata Management, Inc. | San Luis Obispo
Elected At-Large Seat (— June 2026)

VICTOR POPP

La Quinta Inn & Suites | Paso Robles
Appointed Paso Robles Seat (— June 2024)

BRITTEN SHUFORD

PRG Hospitality Group, LLC | San Luis Obispo
Cambria
Elected At-Large Seat (— June 2025)

OPEN SEAT | ARROYO GRANDE

Appointed Arroyo Grande Seat (— June 2024)

OPEN SEAT | BED & BREAKFAST SEAT

Elected Designated Bed & Breakfast Seat
(— June 2024)

OPEN SEAT | GROVER BEACH

Appointed Grover Beach Seat (— June 2024)

OPEN SEAT | RV PARK SEAT

Elected Designated RV Park Seat (— June 2025)



MARKETING COMMITTEE

ASHLEE AKERS

Partner & VP of Client Services | Verdin
(— June 2026)

JIM ALLEN

Director of Marketing & Communications
Hearst Castle (— June 2025)

TERRIE BANISH*

Director of Community Services & Promotions
City of Atascadero

SHERIDAN BOHLKEN*

Recreation Services | City of Arroyo Grande

MOLLY CANO*

Economic Development & Tourism Manager
City of San Luis Obispo

CHERYL CUMING*

Chief Administrative Officer | Unincorporated CBID

GORDON JACKSON*

Executive Director | Pismo Beach CVB

STACIE JACOB*

Executive Director | Travel Paso

LORI KELLER

President/Principal | Blu Hotel Management
(— June 2027)

KATHLEEN NAUGHTON

Executive Director | SLO Coast Wine Collective
(— June 2027)

JOEL PETERSON

Executive Director | Paso Robles Wine Country
Alliance (— June 2026)

LINDSEY ROBERTS

Director of Marketing | Martin Resorts
(— June 2027)

LINDA PARKER SANPEI

CEO & Founder | Parker Sanpei (— June 2025)

LYNETTE SONNE

Founder & Herd Boss | FARMstead ED/SLO Co Farm
Trail (— June 2027)

JOHN SORGENFREI

President & Owner | TJA Advertising (— June 2025)

JILL TWEEDIE

Founder & President | Breakaway Tours Wine &
Events (— June 2025)

MICHAEL WAMBOLT*

Executive Director | Visit Morro Bay

* Destination Partners

BOARD, COMMITTEES & TEAM (CONT'D)

ADVISORY COMMITTEE

JOHN NILON*

County Administrative Officer | County of San Luis Obispo

REBECCA CAMPBELL

Interim County Administrative Officer | County of San Luis Obispo

DAWN ORTIZ-LEGG

Supervisor, District 3 | County of San Luis Obispo

BILL ROBESON

Interim City Manager | City of Arroyo Grande

MATTHEW DOWNING

City Manager | City of Arroyo Grande

LAN GEORGE

Councilmember | City of Arroyo Grande

JIM LEWIS

City Manager | City of Atascadero

MARK DARIZ

Councilmember | City of Atascadero

MATTHEW BRONSON

City Manager | City of Grover Beach

ZACH ZIMMERMAN

Councilmember | City of Grover Beach

YVONNE KIMBALL

City Manager | City of Morro Bay

JENNIFER FORD

Councilmember | City of Morro Bay

TY LEWIS

City Manager | City of Paso Robles

STEVE GREGORY

Councilmember | City of Paso Robles

JORGE GARCIA

City Manager | City of Pismo Beach

STACY INMAN

Councilmember | City of Pismo Beach

DEREK JOHNSON**

City Manager | City of San Luis Obispo

ERICA A. STEWART

Mayor | City of San Luis Obispo

* Until November 2023

** Until April 2024



TEAM



CHUCK DAVISON*

President & CEO



CATHY CARTIER

Chief Marketing Officer/Interim President & CEO



ANNIE BRAUNSCHWEIG

VP of Administration



LISA MARIE BELSANTI

VP of Communications



JESSIE BORCHIN

Office Manager



KRISTEN CARLSON

Director of Sales



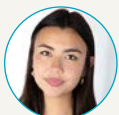
GRACE CASOLA

Senior Manager of Human Resources



WHITNEY CHANEY

Director of Community Engagement & Advocacy



RACHEL GOODE

Communications Coordinator



MATT HALVORSON

Associate Director of Marketing



ALEIGH HOGAN

Sales Manager



MEGAN LEININGER

Marketing Operations Specialist



MAYLA LOHNES

PR & Communications Manager



TREVOR LYNCH**

Director of Marketing



ALYSSA MANNO

Partner Engagement Manager



LAUREN MILLER

Graphic Designer



THERESA NAGAI

Marketing Specialist



RACHELLE RAMIREZ

Events Manager



EMILY RUDGE

Executive Assistant to the President & CEO



BROOKE WEISBECKER

Social Media Manager

* Until March 2024 ** Until January 2024

STRATEGIC DIRECTION 2026

Vision

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

Mission

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

Values

STEWARDSHIP

We value our people and care for our community and resources

AUTHENTICITY

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

INCLUSION

We engage and collaborate with an array of voices and perspectives

EXCELLENCE

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

FUTURE FOCUS

We deliver today with an innovative eye on tomorrow

Strategic Objectives

Enhance our organizational effectiveness

Amplify and steward the SLO CAL brand through unified efforts

Lead the county tourism industry in fostering a vibrant destination

Demonstrate value to investors, partners, stakeholders and communities

Visit SLO CAL (VSC) is a team of destination marketing professionals who work with, and on behalf of, its investors, partners, stakeholders and communities to promote SLO CAL® (San Luis Obispo County, California) to both domestic and international visitors. As the countywide nonprofit destination marketing and management organization (DMMO) for SLO CAL, VSC's goal is to collaborate with partners to build resident quality of life. Built on research with a strategy of continuous improvement, VSC aims to establish SLO CAL as a favorite West Coast destination known for its signature slower pace of life and unique mix of incredible, immersive guest experiences.

Objective 1: Enhance our organizational effectiveness

STRATEGIES

- Audit and streamline processes, procedures and workflows
- Cultivate a values-centered culture reflective of the SLO CAL lifestyle
- Perform a skills and capabilities audit and act on the findings
- Celebrate, recognize and develop the Visit SLO CAL team

KEY RESULTS

- Maintain or grow annual employee engagement score over 2023 baseline
- Grow average employee satisfaction on quarterly survey over 2023 baseline
- Grow values alignment score on quarterly employee survey over 2023 baseline

Objective 2: Amplify and steward the SLO CAL brand through unified efforts

STRATEGIES

- Continue to build on House of Brands marketing strategy
- Increase share of voice through integrated storytelling efforts
- Increase local adoption of SLO CAL nomenclature
- Develop a holistic approach to promoting SLO CAL as an authentically sustainable destination

KEY RESULTS

- Year-over-year increase in unaided visitor Net Promoter Score from baseline of -9
- Grow incremental travel impact as measured by return on ad spend (ROAS) in the annual Brand Awareness Study
- Grow partner participation in Visit SLO CAL marketing efforts
- Increase cross-visitation over FY 2024 baseline

Objective 3: Lead the county tourism industry in fostering a vibrant destination

STRATEGIES

- Champion improvements in intracounty transportation
- Develop a Sustainable Tourism Strategy for SLO CAL
- Create a Regional Tourism Industry Workforce Plan

KEY RESULTS

- Deliver Sustainable Tourism Strategy by June 30, 2025
- Deliver Regional Tourism Industry Workforce Plan by June 30, 2025
- Outperform statewide tourism economic impact growth

Objective 4: Demonstrate value to investors, partners, stakeholders and communities

STRATEGIES

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

KEY RESULTS

- Maintain or improve resident sentiment score over baseline of 2023 survey
- Year-over-year increase in investor, partner and stakeholder engagement over FY 24 baseline

WHY TOURISM MATTERS



TRAVEL SPENDING

\$2.32B **0%**
YOY*

\$6.3M a day | \$267K an hour | \$4.4K a minute | \$73 a second

INDUSTRY EARNINGS

\$912M

↑5.9% INCREASE YOY

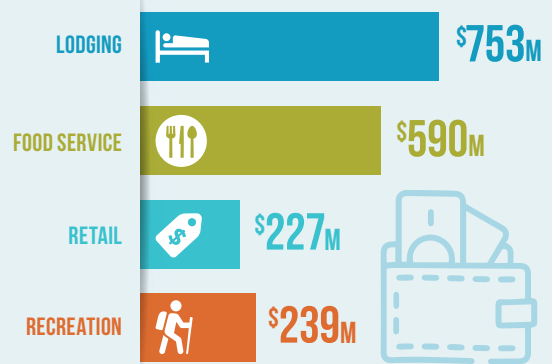
TOURISM PUTS



22,830 **↑2.0%**
INCREASE YOY

RESIDENTS TO WORK EACH DAY

DIRECT SPENDING BY SECTOR



TOURISM CONTRIBUTES

\$60.1M **↓3.1%**
DECREASE YOY

IN TRANSIENT OCCUPANCY TAX REVENUE

WITHOUT VISITORS
EACH SLO CAL HOUSEHOLD
WOULD NEED TO SPEND **\$21,415**
AN ADDITIONAL

TO CREATE THE SAME ECONOMIC BENEFIT
for the community

**TRAVEL SPENDING
CREATED
\$110M
IN LOCAL
TAX REVENUE**

which could cover the expenses for

1,042 POLICE OFFICERS' SALARIES

OR

1,622 FIREFIGHTERS' SALARIES

OR

1,181 TEACHERS' SALARIES

OR

176 MILES OF 2-LANE RESURFACED ROADS

WITHOUT STATE & LOCAL TAX REVENUE
GENERATED BY TRAVEL & TOURISM
EACH SLO CAL HOUSEHOLD WOULD



PAY AN ADDITIONAL

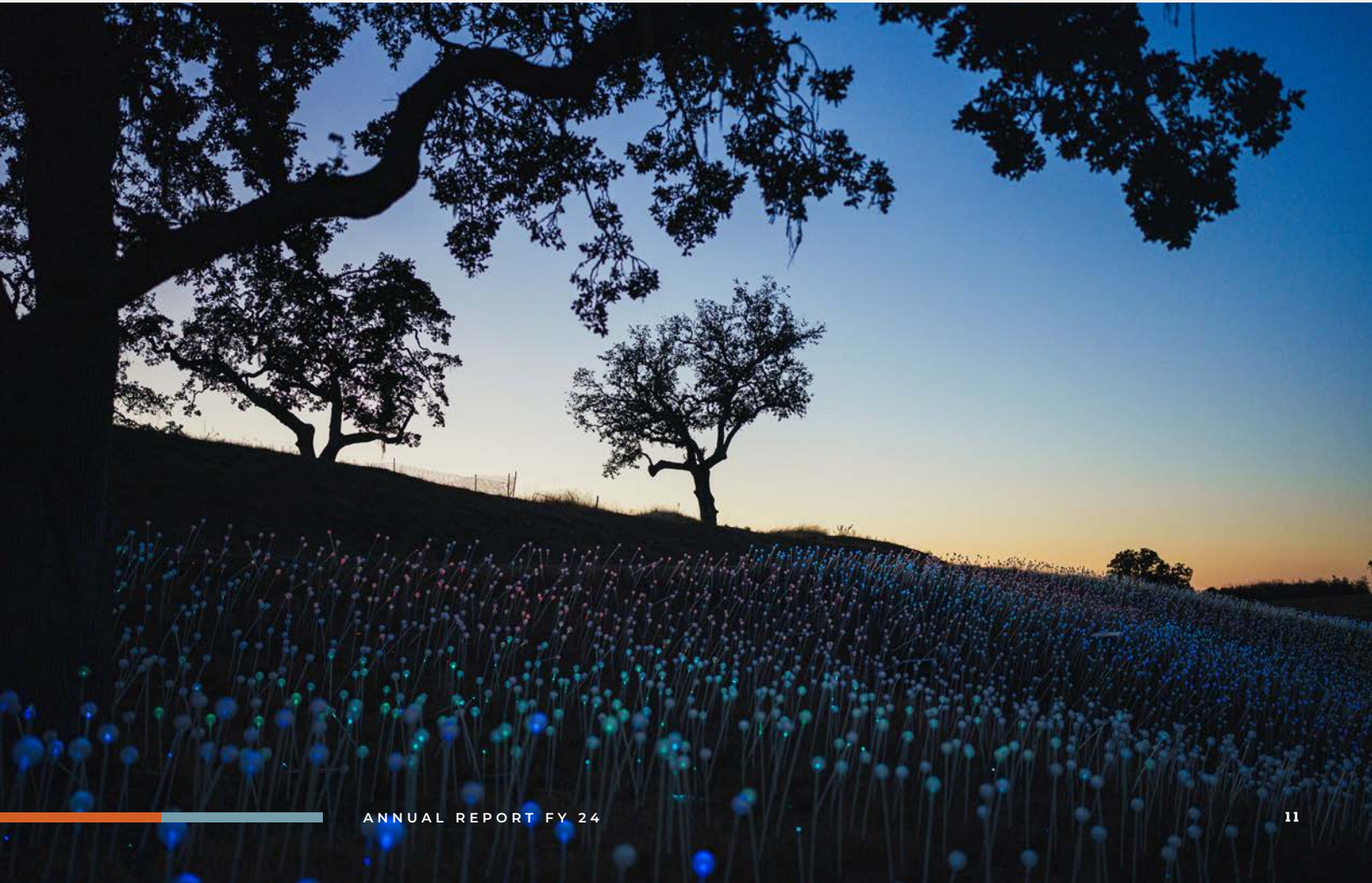
\$1,914 in taxes

TOURISM COMPRISES **10.66%** OF COUNTYWIDE GDP

Data based on 2023 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. *0% change due to adjusted 2022 data.

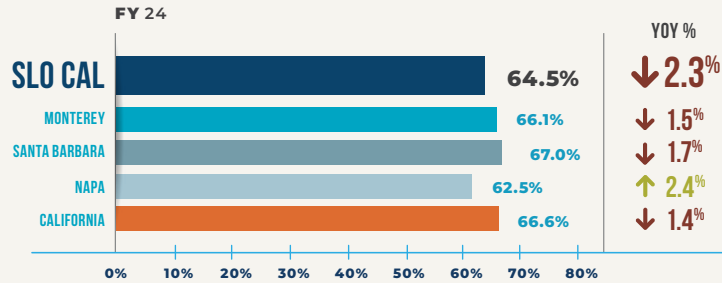
TOURISM DATA INSIGHTS

Visit SLO CAL® (VSC) has continued to work with the San Luis Obispo region's local municipalities and the County of San Luis Obispo to secure data on transient occupancy tax (TOT) by community that segments the area's unique lodging mix (hotels and motels, short-term rentals, bed and breakfasts and RV parks). VSC continues to provide a weekly and monthly Smith Travel Research (STR) reports to its partners while working with Tourism Economics to produce monthly business intelligence reports that combine an array of data from TOT, STR, Azira, VisaVue, Community Benchmark and the San Luis Obispo County Regional Airport (SBP). These reports provide VSC's partners and stakeholders with a complete understanding of how the tourism industry is performing across the entire county.

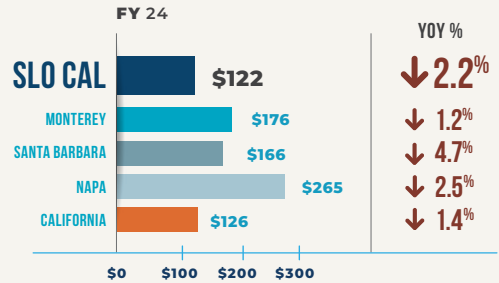


DATA REPORTING

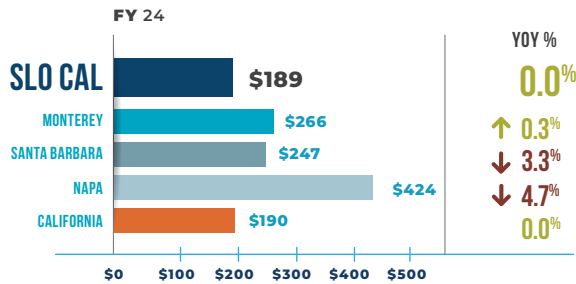
HOTEL OCCUPANCY OCC



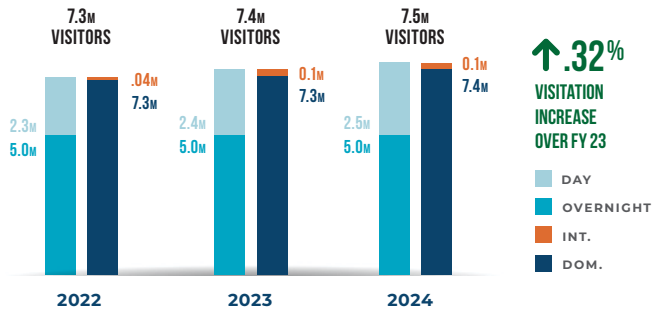
REVENUE PER AVAILABLE ROOM REVPAR



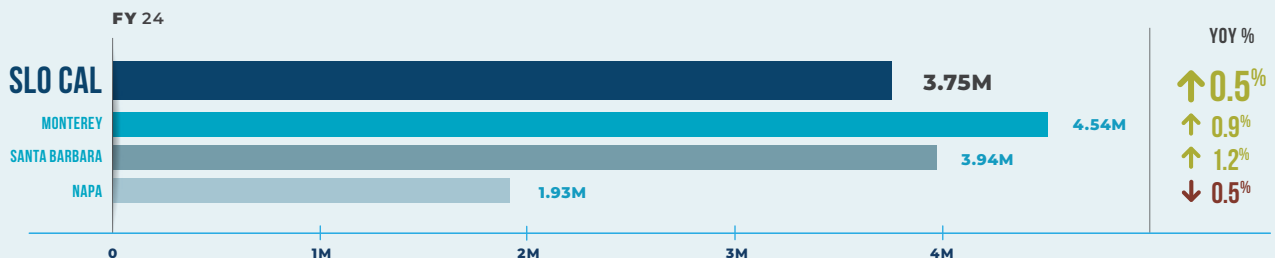
AVERAGE DAILY RATE ADR



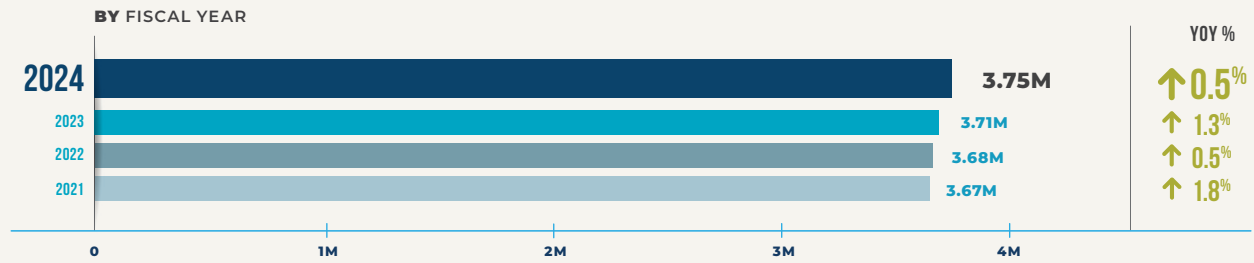
VISITOR VOLUME



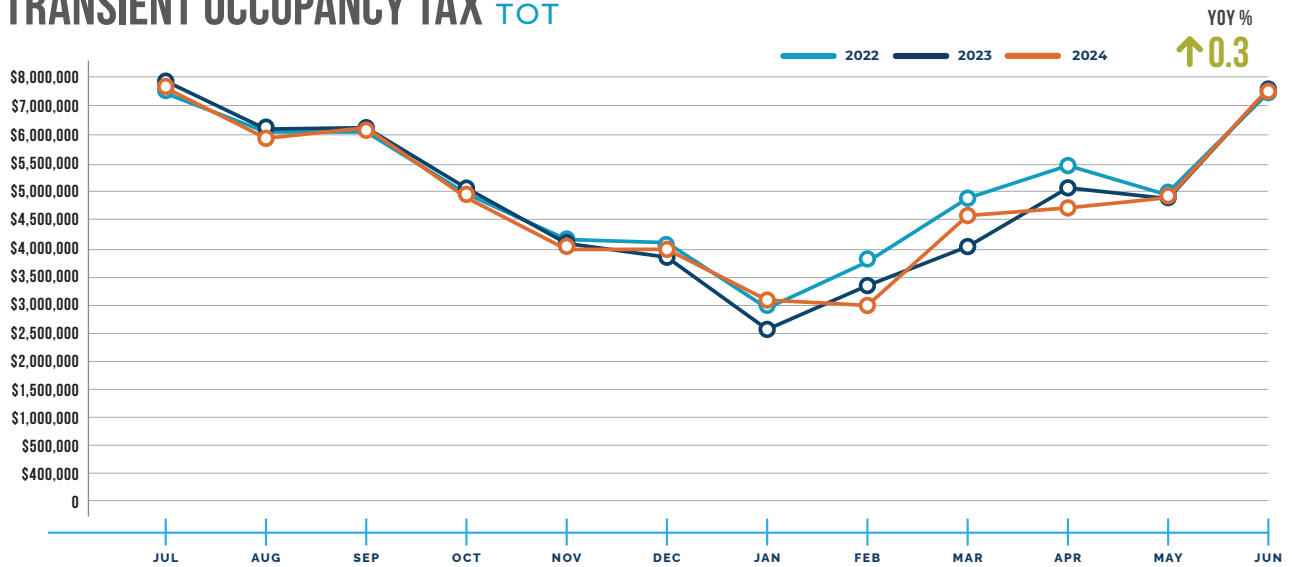
SUPPLY*



SLO CAL SUPPLY*



TRANSIENT OCCUPANCY TAX TOT

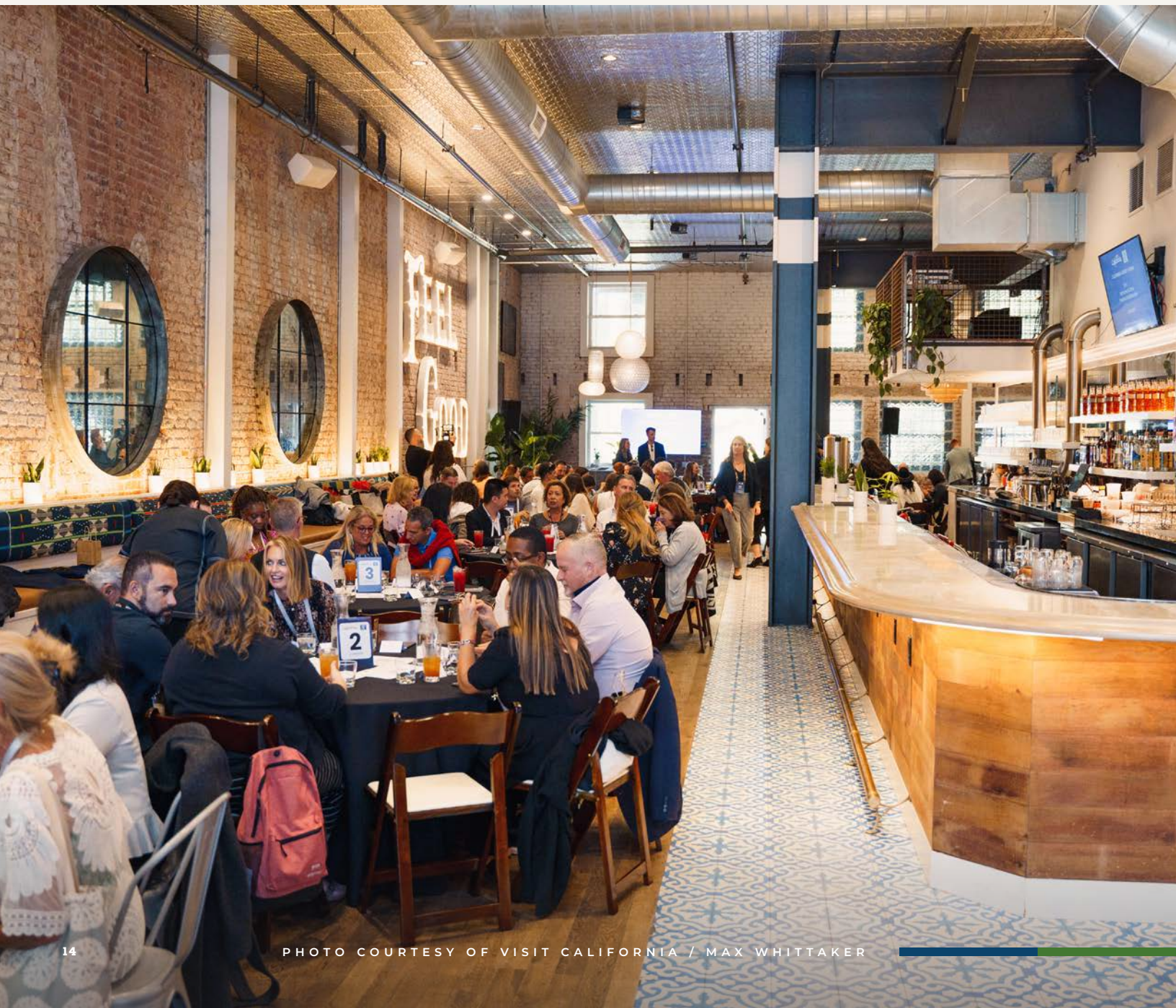


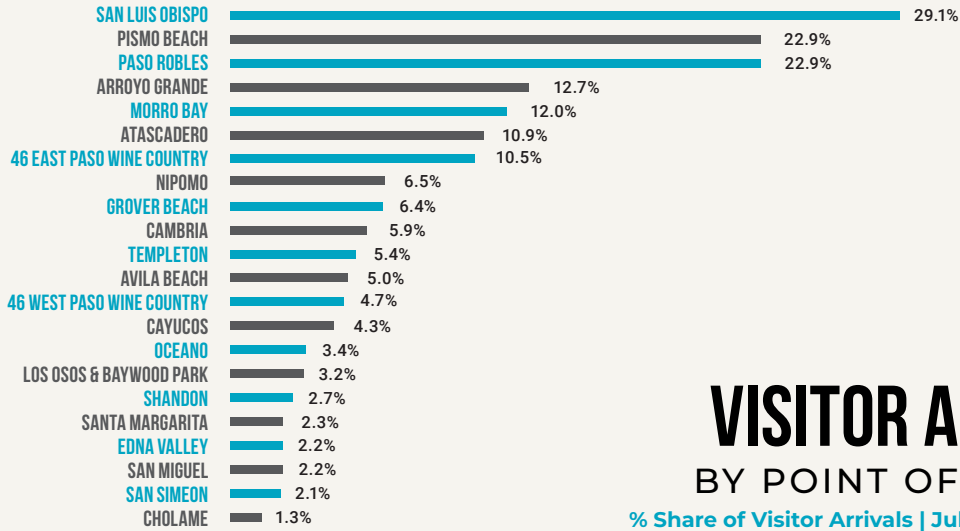
July 2023 – June 2024, Source: Visit SLO CAL, Tourism Economics, STR, LLC. Replication or other reuse of this data without the express written permission of STR, LLC is strictly prohibited. *Total room nights available annually. Data as of September 2024.



ARRIVALS AND VISITATION

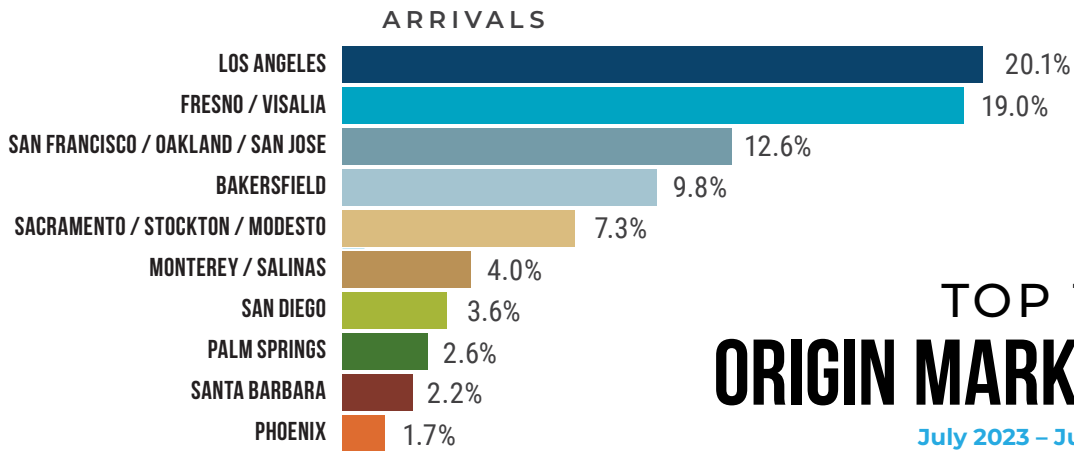
In partnership with Azira and Tourism Economics, VSC provides its partners and stakeholders with insights on visitor arrivals to SLO CAL (San Luis Obispo County), covering key points of interest (POI), arrival times, origins, cross-visitation, length of stay and campaign lift driven by paid media and organic traffic, informing and assessing VSC's advertising efforts.





VISITOR ARRIVALS BY POINT OF INTEREST

% Share of Visitor Arrivals | July 2023 – June 2024



TOP TEN ORIGIN MARKETS

July 2023 – June 2024

CROSS-VISITATION*

1.5

COMMUNITIES PER
UNIQUE ARRIVAL

July 2023 – June 2024

LENGTH OF STAY

1.8

DAYS

July 2023 – June 2024

Source: Azira, Tourism Economics. Percentage share of visitors and origin markets represents data from a sample of tracked devices and do not estimate total devices or total visitors. *Due to enhancements in data collection methodology facilitated by a new data provider, the reported 'number of communities per visit' has been adjusted. This figure more accurately reflects visitor patterns, aligning with current data privacy and accuracy standards. Data as of August 2024.



SALES



VSC boosts regional visibility in domestic and international markets through industry events, trade shows and strategic partnerships with investors, partners and stakeholders at state and regional levels. VSC focuses on educating tour operators, travel advisors and meeting planners selling California travel, while partnering with lodging investors to increase occupancy during need periods.

VSC's partnership with the GUZO Agency brings a new countywide sales strategy that elevates the region as a premier destination. The strategy emphasizes building partnerships with meeting planners, tour operators and travel advisors while boosting collaboration with local investors, partners and stakeholders. The first phase focused on educating tour operators and lodging investors, laying the foundation for increased international visitation.

In February 2024, VSC embarked on its annual UK Sales Mission in collaboration with its international public relations and sales agency for the UK and Ireland, MMGY Hills Balfour. The mission strengthened relationships with UK tour operators and educated them on SLO CAL's unique attractions. Following the mission, VSC hosted top-tier UK tour operators for a familiarization (FAM) tour to experience the destination firsthand.

2023

OCTOBER

California Luxury Forum

Vacation Rental Management Association Conference

DECEMBER

CalSAE Seasonal Spectacular

2024

FEBRUARY

GoWest Summit
UK Sales Mission

MARCH

UK Product Manager
Familiarization tour (FAM)

MAY

IPW
Visit California's California Plaza

147
APPOINTMENTS

5
TRADE SHOWS

210
LEADS*

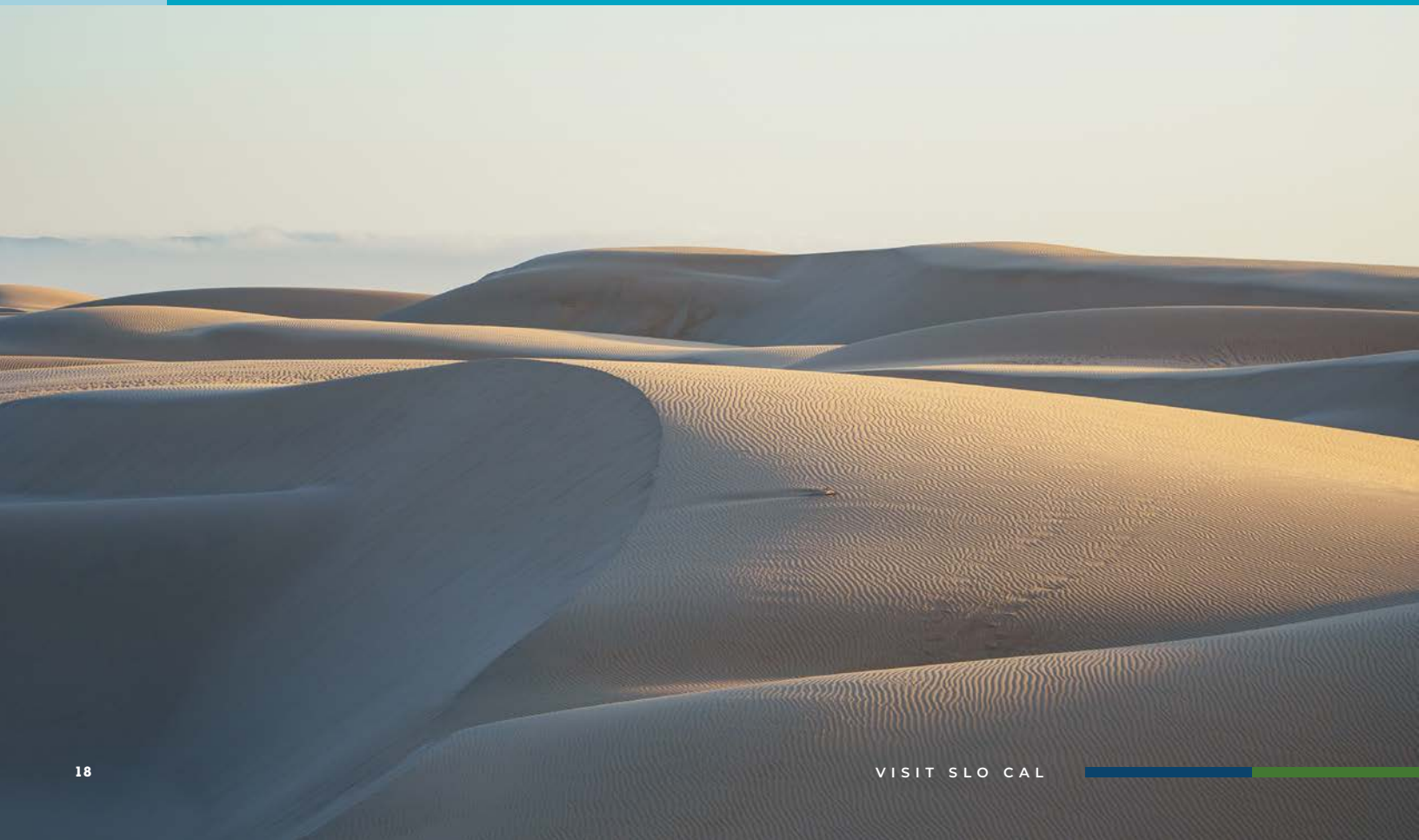
408
BUYERS TRAINED

2
FAMS

**Lead: A connection or opportunity provided to local investors and partners to book business, promote their company or host travel buyers and meeting planners to experience their product.*



EARNED MEDIA



VSC collaborates closely with its domestic and international PR agencies MMGY and MMGY Hills Balfour along with Visit California, local destination partners, investors and stakeholders to engage with members of the press through in-market meetings, press events, media mailers and FAM tours. VSC regularly attends media events like the International Media Marketplace (IMM), Visit California’s Media Dinners and U.S. Travel’s IPW. Additionally, VSC participated in missions in Dallas, London and Los Angeles. VSC also sponsored regional events like the SLO CAL Open in Pismo Beach and Morro Bay, as well as the Spartan Race at Santa Margarita Ranch, inviting top-tier local reporters to cover these highly anticipated events.

In FY 24, Visit SLO CAL was selected for Wanderlust Magazine's Travel Green List™. As the UK’s largest and longest-running travel magazine, Wanderlust has championed authentic and responsible travel for over 30 years. This recognition demonstrates SLO CAL’s commitment to encourage and promote sustainability practices by regional tourism businesses and nonprofits. The Travel Green List™ recognition is a testament to the region’s meaningful efforts to positively impact the environment and community.

DOMESTIC 
145 ARTICLES
\$19.8M AD VALUE EQUIVALENCY
980M IMPRESSIONS

LOCAL 
85 ARTICLES
\$114k AD VALUE EQUIVALENCY
7.6M IMPRESSIONS

INTERNATIONAL 
108 ARTICLES
\$2M AD VALUE EQUIVALENCY
119M IMPRESSIONS

TOTAL _____

338 ARTICLES **\$21.9M AD VALUE EQUIVALENCY** **1.11B IMPRESSIONS**





OWNED MEDIA



VSC began a multi-year effort to optimize all owned media platforms, focusing on refining systems to enhance user experience and boost engagement. This data-driven process, applied to the website, newsletters and visitor magazines, ensures every step is backed by research and analysis.

WEBSITE | SLOCAL.COM

Following a detailed User Experience (UX) study in FY 24, VSC improved the user experience by addressing key friction points to enhance accessibility and streamline navigation. Updates included shortening the hero image for quicker access to information, improving navigation and revamping the “Explore the Region” section for a more intuitive user journey. These changes mark the start of a long-term strategy to continuously refine VSC’s digital presence and better serve visitors.

Alongside functional improvements, VSC refined its editorial strategy through comprehensive keyword research. The team identified high-value topics and search terms that resonate with the target audience leading to new content that attracts organic traffic and aligns with visitor interests. By focusing on long-tail keywords and user intent, VSC created content that boosts engagement, partner referrals and user dwell time on the site.

1.05M ↑ **4.1%** YOY
ENGAGED SESSIONS

65.7% ↑ **33.4%** YOY
ENGAGEMENT RATE

2.36 ↑ **10.8%** YOY
PAGES PER SESSION

48SEC ↑ **27.1%** YOY
AVG TIME ON SITE

207K ↑ **25%** YOY
PARTNER REFERRALS

OWNED MEDIA Continued

SOCIAL MEDIA

VSC partners with Pensara, a social and digital marketing and creative agency, to enhance its social media strategy. This collaboration builds upon past successes, emphasizing a video-centric approach that combines high-quality branded content with authentic Instagram reels. This strategy significantly boosts engagement and video views by effectively connecting with the audience and encouraging content saves and shares. This approach sustains audience interest by featuring bold and innovative content. To optimize further, VSC and Pensara developed eight distinct series aligned with key social strategy pillars, presenting content in a highly consumable format that supports VSC's strategic objectives.

ORGANIC SOCIAL MEDIA METRICS ACROSS ALL PLATFORMS FY 24



CONSUMER NEWSLETTER

In FY 24, VSC transformed its consumer newsletters by segmenting content based on the recipients' locations—local, fly, drive markets and beyond. This targeted approach, along with A/B testing of subject lines and content placement, maximizes engagement and delivers more relevant content. These changes improve open rates and enable more personalized, effective communication with VSC's audience.

33,289 ↑2.3%
E-NEWSLETTER SUBSCRIBERS

10.84% ↓9.1%
E-NEWSLETTER CLICK RATE

59.7% ↑67.9%
E-NEWSLETTER OPEN RATE

VISITOR MAGAZINE

In FY 24, VSC focused on efficiency and strategic distribution for the visitor magazine. Instead of creating a new edition from scratch, VSC refreshed the previous year's magazine to save time and resources. VSC also implemented a robust tracking and distribution plan to ensure each copy reaches its intended audience. This approach maintains high content and design standards while optimizing efforts and broadening dissemination across the county and key markets.

34.7k ↑3.6%
VISITOR MAGAZINES DISTRIBUTED

183
LOCATIONS REACHED

1,909 ↑28.6%
CONSUMER ORDERS





PAID MEDIA

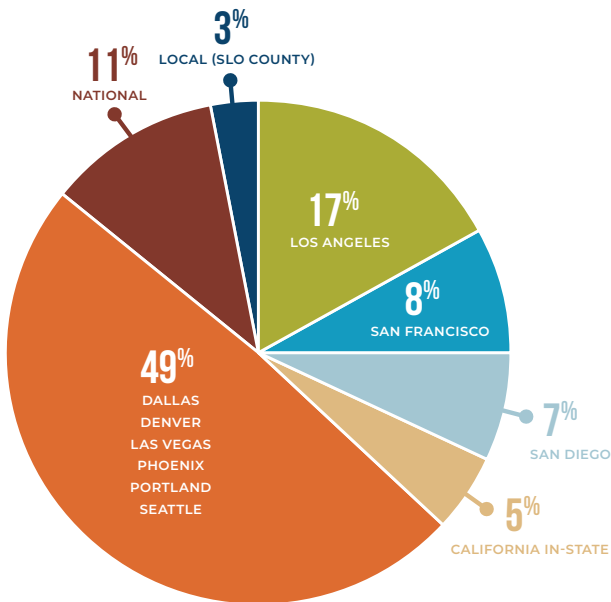
VSC continues to leverage its partnership with The Shipyard, an independent full-service advertising agency, for creative assets and media buys. In FY 24, the media strategy expanded with key initiatives, including a local nomenclature campaign featuring the “*My SLO CAL*” video, two editions of a zine and a new travel series titled “*Unpacking*.” A co-op campaign with Sojern bridges VSC and participating partners through cross-channel executions. “*The Land of...*” campaign remains central to VSC’s advertising efforts, driving strategy across platforms and complimented by sustainability content, “*SLO CAL Crafted*” videos, House of Brands and cross-visitation spots for a cohesive marketing approach.

FY 24 PAID MEDIA MIX & BUDGET ALLOCATION

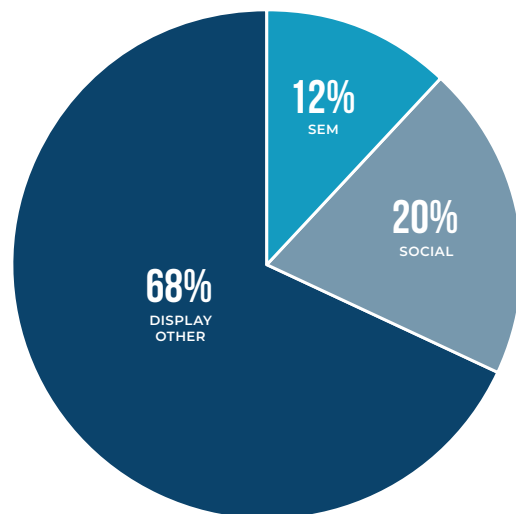
FY 24 PAID MEDIA SNAPSHOT



PAID MEDIA BY MARKET



BREAKDOWN BY CHANNEL



Spend does not include co-op dollars.



PARTNERSHIPS & EVENTS

VSC strengthens its commitment to investors, partners and stakeholders by enhancing the region's brand through storytelling and strategic sponsorships and partnerships. VSC builds on the success of the “*SLO CAL Crafted*” program by promoting local businesses through pop-up markets and content series. In FY 24, VSC sponsored high-profile events like the California Mid-State Fair, Spartan Race and the SLO CAL Open Pismo Beach and Morro Bay, boosting brand visibility and creating valuable connections for local businesses with new audiences. These efforts support continued growth and recognition for the SLO CAL region, while expanding partnerships, increasing brand visibility and promoting local culture and attention to the region.

“SLO CAL CRAFTED”

VSC has consistently expanded the “*SLO CAL Crafted*” program’s reach and brand recognition. By the end of FY 24, the program grew to include 149 certified partners, with 33 new additions over the year. To boost brand recognition, VSC initiated new engagement opportunities for “*SLO CAL Crafted*” partners through pop-up markets, media missions and trade shows. The most notable event was the first “*SLO CAL Crafted*” Farmers Market Series in September 2023. VSC hosted four weeks of pop-up activations at the Downtown SLO’s Farmers’ Market located in the City of San Luis Obispo. Featuring six to seven rotating partners each week, the series proved to show high engagement and value to partners and visitors. Additionally, VSC expanded opportunities for “*SLO CAL Crafted*” pop-up marketplaces through strategic partnerships with Vespera Resort and Sensorio, hosting six to ten certified partners each co-marketed with VSC.

NEW PARTNER ON-BOARDING

VSC on-boarded 135 new partners and enhanced its outreach with a new comprehensive “Partnership Guide.” This guide details partnership requirements, benefits and how to join. Available in digital and physical formats, it provides essential information on partnering with VSC. The online partner portal reorganized to match the guide’s content, leading to a 37% increase in partner engagement and strong involvement from new and existing partners.

CONTENT SERIES

VSC released 10 new videos highlighting partners from across the region. These videos are part of three content series developed by VSC: “*SLO CAL Crafted*,” “*SLO CAL Culinary*” and “*SLO CAL Community*.” “*SLO CAL Crafted*” highlights local artisans and the creation of regionally-made products. “*SLO CAL Culinary*” features the vibrant culinary scene in the county. “*SLO CAL Community*” focuses on unique experiences and events that define the SLO CAL region. Each video release is supported by an integrated marketing plan across all channels.

In addition, VSC expanded the “*Sustainably SLO CAL*” sub-brand to highlight businesses embracing sustainability practices in the region. VSC filmed three partners for the “*Sustainably SLO CAL*” series with these videos following the same integrated marketing plan across owned, earned and paid media.

PARTNERSHIPS & EVENTS Continued

CALIFORNIA MID-STATE FAIR

In 2023, VSC was a major sponsor of the California Mid-State Fair's *Michelob ULTRA Concert Series* in Paso Robles. VSC hosted two key activations at the fair. One activation was a social media back-drop in the concert arena for attendees to take photos, promoting SLO CAL nomenclature. The second was a "SLO CAL Crafted" section in the main shopping area, featuring over 80 products and daily sales monitoring for 23 "SLO CAL Crafted" partners. This activation earned state-wide recognition with a Merrill Award, the highest honor in the Western Fairs Association (WFA) Achievement Award Program, celebrating innovation, vision and excellence.

SLO CAL SUMMIT

In October of 2023, VSC hosted its annual Destination Summit, rebranded as the SLO CAL Summit, at the Embassy Suites Hotel in the City of San Luis Obispo. This marks the second in-person summit since before the COVID-19 pandemic. The sold-out event welcomed over 220 local partners, investors, stakeholders and hospitality community members. The keynote speaker was Michael Dominguez, President and CEO of Associated Luxury Hotels International (ALHI), the largest global sales organization to a collection of 250 independent, luxury hotels and eight independent brands. The educational event provided attendees an array of information from branding to advocacy. The event concluded with a hosted reception showcasing "SLO CAL Crafted" partners and the program. A pop-up market featured eight "SLO CAL Crafted" vendors, along with additional partner vendors.



SPARTAN RACE

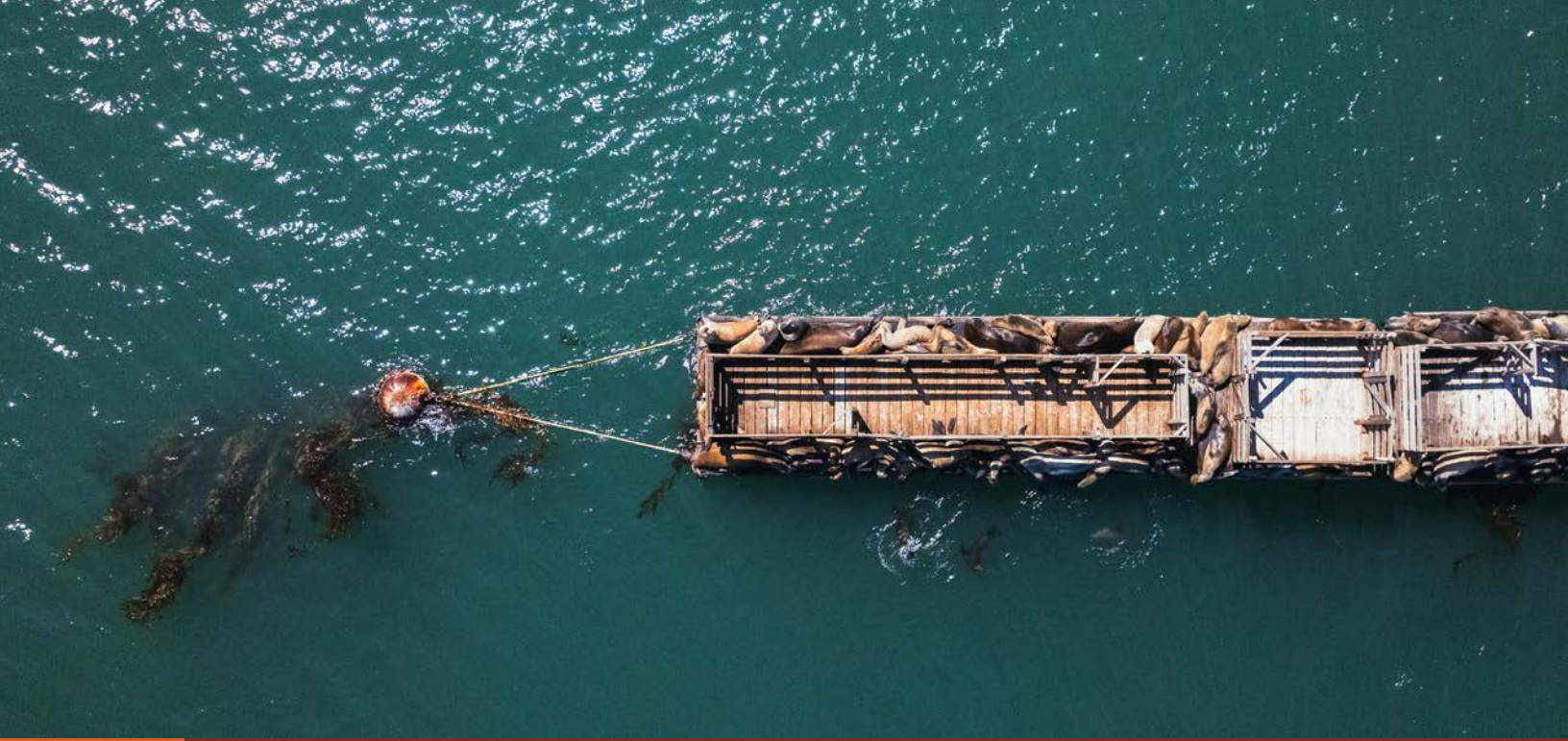
In November 2023, VSC was the host sponsor for Spartan Race, an obstacle course race with a community of eight million participants world-wide. The event was held in Santa Margarita for the second year in a row. VSC's on-site activation included co-op partners City of San Luis Obispo, City of Atascadero, Visit Morro Bay and Travel Paso. "SLO CAL Crafted" partner Rod & Hammer's SLO Stills served complimentary whiskey tastings to participants. VSC also featured a social media activation with photo ops and lawn games and conducted a giveaway to collect tourist data and promote SLO CAL nomenclature.

SLO CAL OPEN

In January, VSC was the title sponsor for the SLO CAL Open with the World Surf League (WSL). For the second year in a row, the region hosted a Qualifying Series, QS 3000, event to bring in higher-caliber surfers from around the world to the region. In addition, the Morro Bay QS 1000 series competition was held at an earlier date, moving from February 2024 to December 2023, aiming for better surfing conditions, while boosting off-season tourism.

The combined events generated 414K views across event pages, live stream, results and content on the WSL website. The events collectively garnered 113K engagements across YouTube, Instagram, Facebook, and X. VSC achieved a total of 5.4 million impressions, with VSC commercials running at commercial breaks for both events.





BRAND AWARENESS STUDY

VSC engaged Heart+Mind Strategies to conduct a Brand Awareness Study to evaluate the impact of the “*The Land of...*” campaign on key performance indicators and assess the return on investment from ad spend in FY 23. Conducted after the campaign’s first year, the study offers valuable insights for optimizing ongoing media decisions.



MODE	Online Survey
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LENGTH	15 Minutes
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DATES	July 27 – August 9, 2023
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AUDIENCE (n=3,537)	18 years of age or older Traveled 50+ miles for leisure travel in past 12 months and stayed overnight in paid accommodation
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GEOGRAPHY	Los Angeles (n=502) San Francisco (n=403) Phoenix (n=410) Dallas (n=403) Sacramento (n=304) San Diego (n=306) Seattle (n=303) Portland (n=305) Las Vegas (n=301) Denver (n=300)
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KEY TAKEAWAYS

- One in eight travelers (12%) in targeted DMA regions recall seeing SLO CAL advertising in the past year, up from 9% in 2022
- The ads are well liked, with 96% having a favorable impression the ads effectively communicate that Life's Too Beautiful to Rush® and broaden understanding of the SLO CAL experience, inspiring travelers to visit more than one destination in SLO CAL
- Ad awareness positively impacts brand metrics, with those recalling the ads more likely to consider future visits and have more positive perceptions of SLO CAL
- Travelers who recall the ads are more likely to visit SLO CAL, stay longer, visit more locations and spend more
- The ad campaign is estimated to have a net positive economic contribution to SLO CAL, with an expected economic contribution of \$1.0 billion-\$1.4 billion and \$5.3 million-\$7.7 million in TOT revenue, a 2:1 ratio compared to the campaign cost



FILM SLO CAL

Film SLO CAL, the film commission for San Luis Obispo County and a division of VSC, navigated a challenging fiscal year due to the disruptions caused by the writers' and actors' strikes. Despite this, the commission successfully supported numerous productions, focusing on commercial shoots to keep the region active. FY 24 initiatives focused on revamping its digital presence including redesigning the film microsite, integrating lead tracking with the Customer Relationship Management (CRM) platform, launching a social presence and starting a reengagement email campaign.

Film SLO CAL remained committed to industry engagement and education, hosting a successful FAM tour with the SLO International Film Festival, welcoming five influential film professionals, including the California Film Commission's Location Resource Advisor. Film SLO CAL also organized a workshop for the region's permitting partners, featuring insights from a key California Film Commission member, strengthening industry relationships and showcasing SLO CAL as a competitive destination for filmmakers.



41 PRODUCTIONS



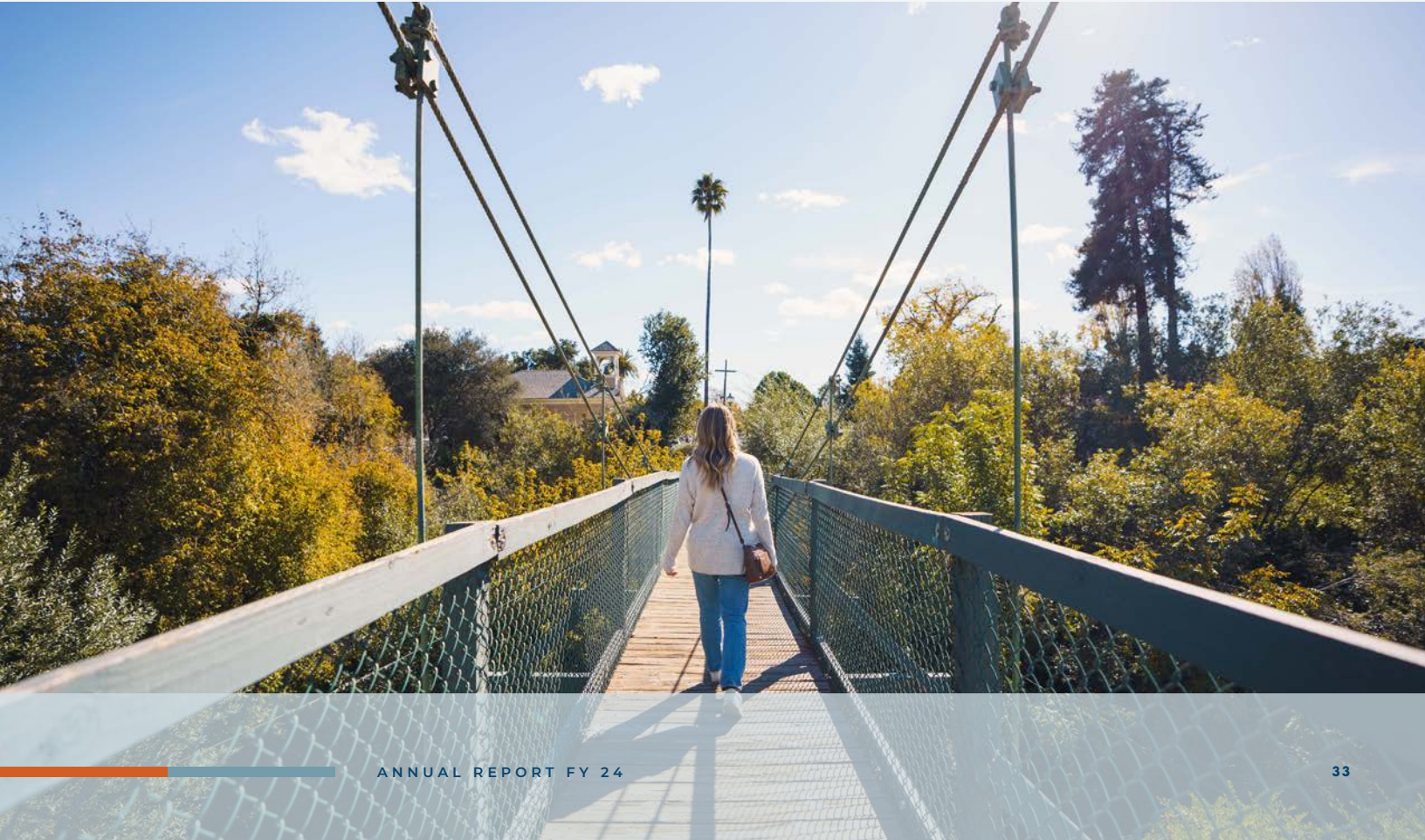
52 LEADS



112 FILMING DAYS



\$560k ESTIMATED SPEND
IN SLO CAL





ADVOCACY

VSC's advocacy work continues to focus on raising awareness, visibility and influence of the SLO CAL travel and tourism industry among the community, leaders and stakeholders. These efforts ensure that the industry's voice is represented in decisions that impact tourism.

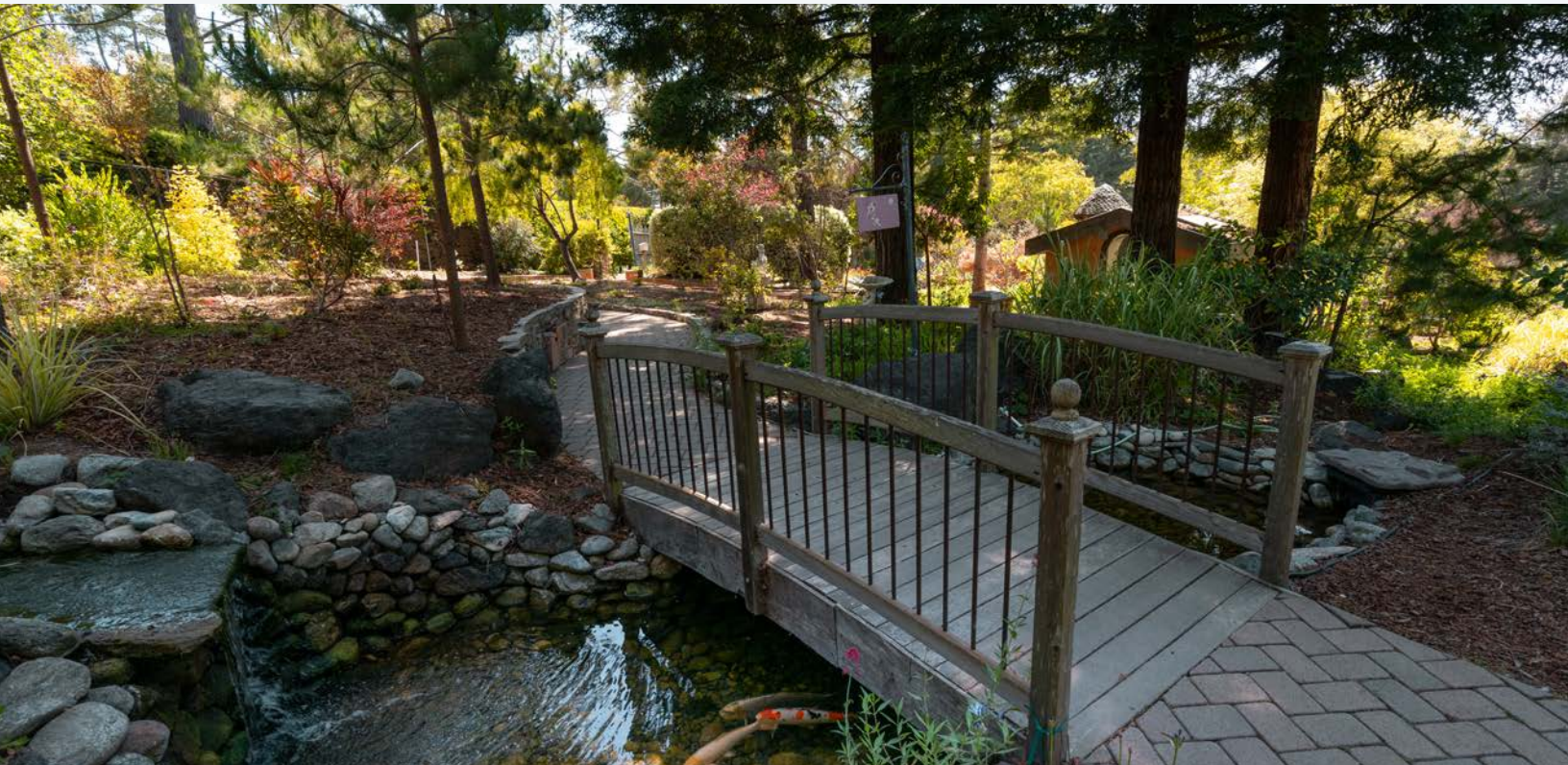
TOURISM ADVOCACY PARTNERSHIPS

VSC continues to advocate for the industry in local, state and federal policy discussions through partnerships with the California Travel Association (Cal Travel) and the U.S. Travel Association. In FY 24, VSC maintained membership and a board seat at CAL Travel, participated in key meetings including CAL Travel Advocacy Day and U.S. Travel's Destination Capitol Hill and engaged with legislators to support tourism-friendly policies.

ADVOCACY SUPPORT & ENGAGEMENT

In FY 24, VSC advocated for legislation that would advance the region's tourism economic impact through advocacy letters and partner support. To align with the vision of a vibrant and sustainable SLO CAL, a resident sentiment survey by Destination Analysts found nearly three-fourths of residents see tourism as vital to the county's future, while two-thirds believe tourism improves quality of life despite concerns about over-tourism and environmental impact.

In spring FY 24, VSC launched the advocacy toolkit to support individual and group advocacy efforts with resources including links to government pages, educational materials on current issues and ways to contact elected officials.



EXPERIENCE SLO CAL 2050

Experience SLO CAL 2050 is the destination management strategy aimed at enhancing resident quality of life while driving economic growth and regional stewardship.

ITEMS VISIT SLO CAL ADVOCATED FOR IN FY 24

AIR SERVICE DEVELOPMENT

In collaboration with SBP, VSC introduced a refreshed logo and brand guidelines for the airport, marking a new era of identity. Together, we celebrated a record number of arrivals, driven by the launch of new seasonal service to Las Vegas and the expansion of second daily flights to Dallas, Los Angeles, San Diego and Seattle and the resumption of daily service to Portland.

SLO CAL WELCOME CUSTOMER SERVICE TRAINING

In FY 24, VSC promoted the SLO CAL Welcome program through its weekly newsletter, new partner onboarding and distribution of rack cards at events. From July 1, 2023 to June 30, 2024 the program certified 234 SLO CAL Welcome Experts from 74 different local tourism businesses. VSC also gathered feedback and explored improvements by attending eight board meetings with destination partners.



EVENTS & FESTIVALS STRATEGY

In FY 24, VSC launched the Events and Festival Working Group (E&FWG) with strategic partners to guide the development of the Events & Festival Strategy. The group identified the need for a centralized calendar to improve the visitor experience and encourage cross-visitation. After research and feedback, VSC decided to enhance its existing calendar for better listings and access. The E&FWG also led to the creation of a partner-facing toolkit which includes an annual Fiscal Year Partner Planning event calendar and access to the Event Impact Calculator for submitting event data through Destinations International.

STEWARDSHIP IN TOURISM

In FY 24, VSC expanded its marketing footprint to position SLO CAL as a leading sustainable tourism destination. VSC enhanced brand storytelling with immersive content, including blog features on sustainable itineraries, “SLO CAL Crafted” partners and Sustainability in Practice (SIP) Certified® wineries. VSC efforts in sustainability continue to evolve as it develops a sustainable tourism strategy tailored to the needs and requirements of tourism in San Luis Obispo County in the new fiscal year.



FY 24 EXPENDITURES

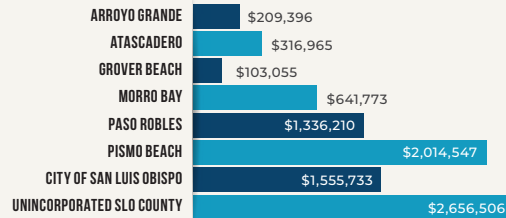
METHOD OF BASIS OF LEVYING ASSESSMENT

The annual assessment rate is 1.5% of gross revenue from short-term rentals (stays 30 or fewer consecutive days). The county and each city collect this assessment from lodging businesses in their jurisdiction monthly or quarterly, including any delinquencies, penalties and/or interest. Within 30 days of collection, the county and cities transfer these assessments to the Tourism Marketing District (TMD) managed by Visit SLO CAL.

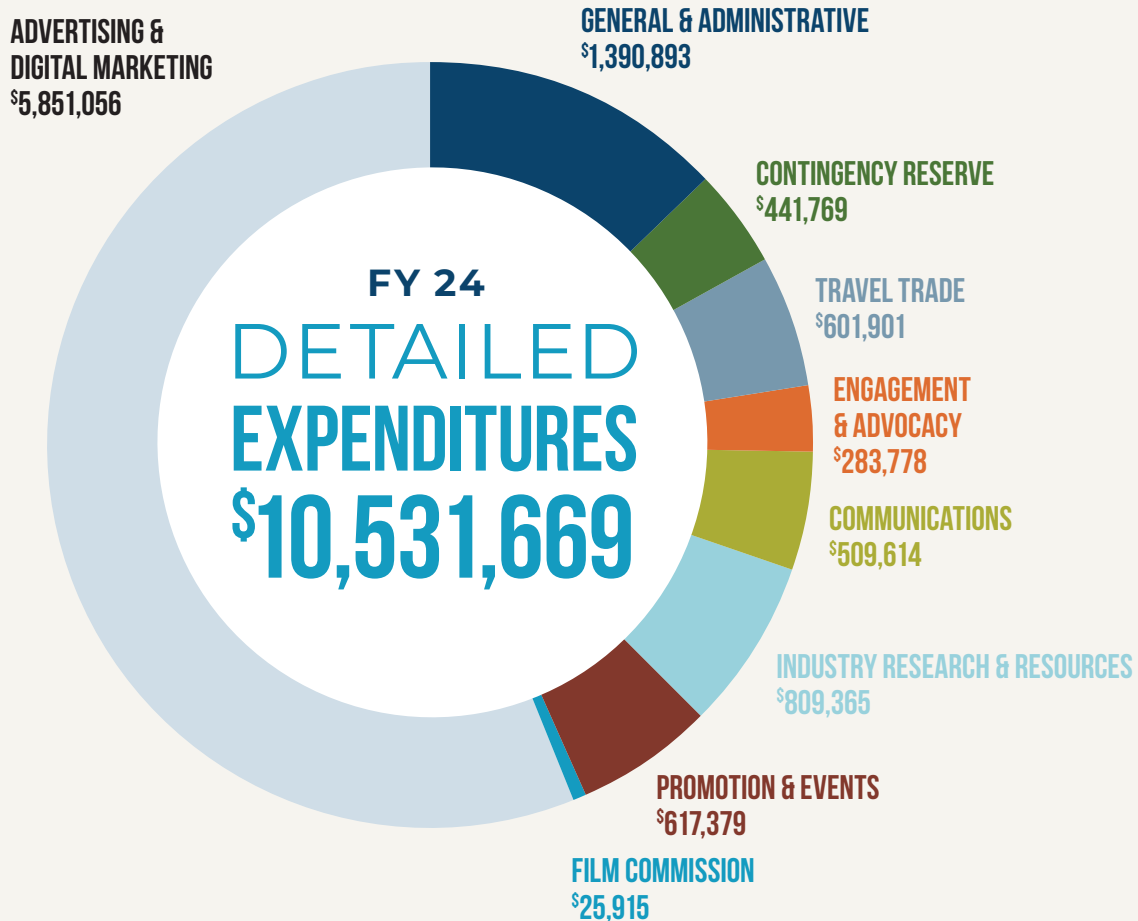
PROPOSED BOUNDARY, ZONE OR CLASSIFICATION CHANGES

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

ASSESSED FUNDS FROM FY 2024*



*Collections remitted from July 1, 2023, through June 30, 2024, including adjustments made for current year remittances that varied from accrued amounts. Total assessments: \$8,834,185



FY 25 BUDGET

ESTIMATED COST OF PROVIDING ACTIVITIES IN THE NEXT FISCAL YEAR

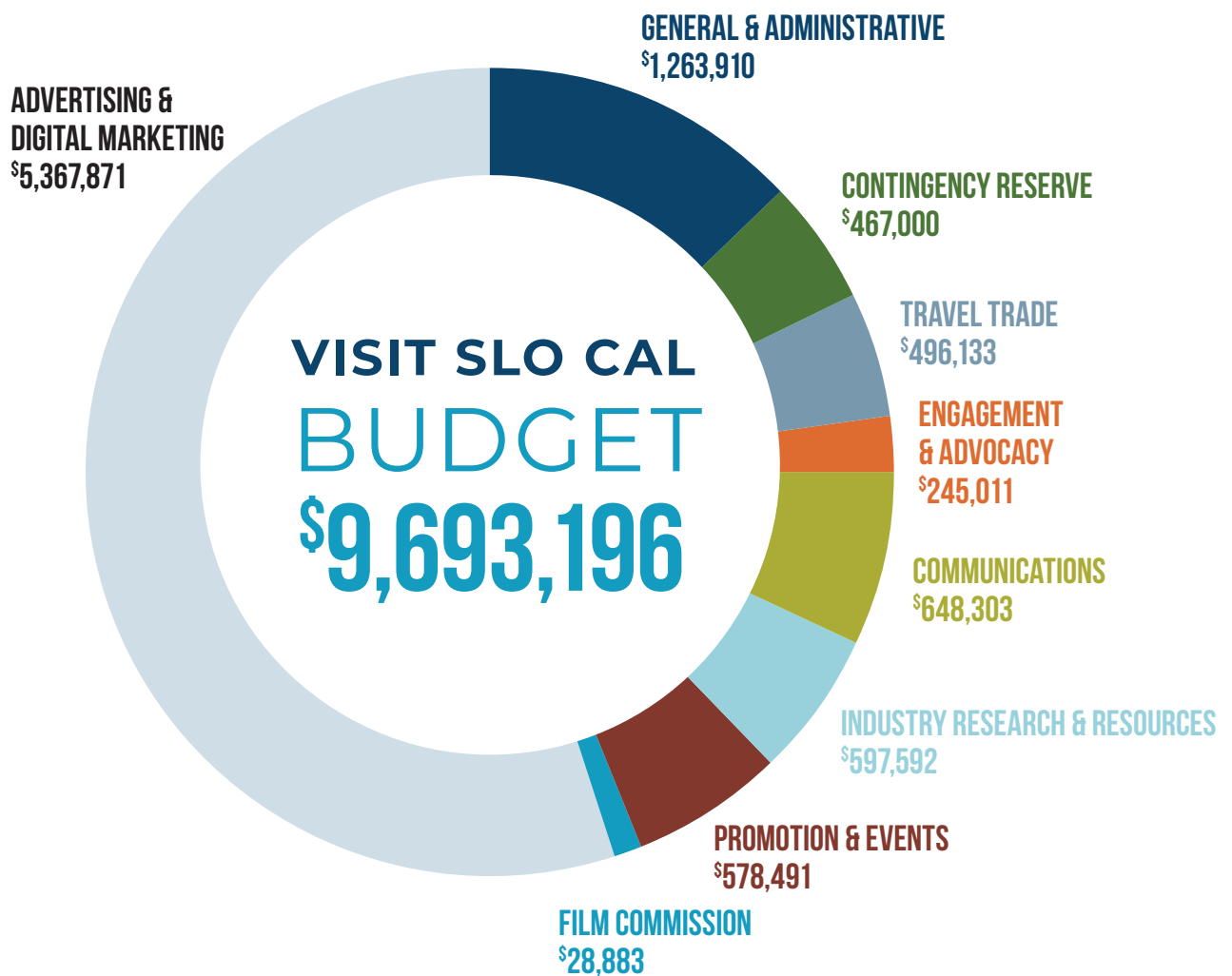
\$9,693,196

ESTIMATED CONTRIBUTION FROM NON-ASSESSMENT SOURCES

\$234,900

ESTIMATED PRIOR YEARS' CUMULATIVE SURPLUS CARRIED FORWARD TO FY 25

\$1,343,636





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