

ANNUAL REPORT **FY 2022**



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Visit SLO CAL (VSC) is a team of destination marketing professionals who work with, and on behalf of, its investors, partners, stakeholders and community 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 the SLO CAL brand through a data-driven, efficient and dynamic marketing and sales program while simultaneously enhancing the 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.

Letter from the President & CEO

Dear Visit SLO CAL Investors, Partners & Stakeholders,



Visit SLO CAL's key focus in FY 2022 was accelerating recovery for one of the region's top economic drivers: tourism.

Investing in people, Visit SLO CAL hired new leadership talent to advance our mission and grow our capabilities, while also engaging in an RFP process for domestic public relations services. Through that process, we identified MMGY-NJF as the best agency to help us move our PR efforts forward and inform our domestic media plans.

A robust Future Visitor Profile Study and an Equity, Diversity and Inclusion Asset Alignment Study were finalized to inform Visit SLO CAL's largest marketing ad buy to date. A \$3.2M spend was strategically planned and placed by the gold standard of California tourism marketing — our agency of record, The Shipyard — to promote visitation to the region. In looking at our competitive set, SLO CAL held its own against Santa Barbara, Napa, Sonoma and Monterey, in many cases outpacing their rate of recovery.

As restrictions for international travel lifted, Visit SLO CAL was poised for further success with the re-engagement of our UK trade and media agency, and we celebrated the reopening of our largest international attraction, Hearst Castle. A small but important segment of our visitor mix, international travelers continue to make SLO CAL part of their Highway 1 road trip experience.

Visit SLO CAL pitched and won our bid to host the 2022 Luxury Forum, presented by Visit California and Connections Luxury. The event will allow Visit SLO CAL to highlight the world-class tourism product in our region to key domestic and international luxury buyers.

We expanded our SLO CAL Crafted initiative, certifying almost 80 local businesses and highlighting authentic visitor experiences through our earned, owned and paid media. This effort is in direct alignment with the findings in the Future Visitor Profile Study, which highlighted a desire for locally produced products and experiences.

Visit SLO CAL entered an ambitious, yearlong website redesign project in FY 2022 — overhauling one of our most important assets — and saw the payoff with record website traffic.

We advanced key initiatives in the Experience SLO CAL 2050 plan, gaining alignment from all destinations in a Commitment to Collaborate for the Events & Festivals Strategy that will continue throughout FY 2023. Visit SLO CAL also engaged investors, partners, and stakeholders in the Customer Service Training design and content priorities, setting up the program to be launched in the coming fiscal year.

We are proud of our accomplishments, in collaboration with all of you, which are highlighted in this report. We hope that you will take the time to review the delivered scope of work. We thank you for your partnership in responsibly growing tourism throughout the region.

Here's to another great year,

A handwritten signature in dark ink, reading "Chuck Davison".

Chuck Davison, CDME
President & CEO, Visit SLO CAL

Board, Committees & Team

Board of Directors

HEMANT PATEL

Chair | 805 Hospitality | Morro Bay, Paso Robles
San Luis Obispo | Unincorporated Area
Appointed Morro Bay Seat (— June 2023)

AARON GRAVES

Vice Chair | EverlyGrove Hotel Brokers |
Unincorporated Area
Elected Designated At-Large Seat (— June 2023)

AMAR SOHI

Treasurer | Holiday Inn Express Hotel & Suites |
Atascadero
Appointed Atascadero Seat (— June 2023)

MARK EADS

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

CLINT PEARCE

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

ALMA AYON

Sundance Bed & Breakfast | Paso Robles
Elected Designated Bed & Breakfast Seat
(— June 2024)

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 2022)

JOHN CONNER*

Petit Soleil | San Luis Obispo
Appointed San Luis Obispo Seat (— June 2023)

JIM HAMILTON

County of San Luis Obispo
Appointed County At-Large Seat (— June 2023)

JAY JAMISON

Pismo Coast Village | Pismo Beach
Elected Designated RV Park Seat (— June 2022)

TONI LEGRAS

Beachside Rentals | Unincorporated Area
Appointed Unincorporated Area Seat (— June 2022)

SAM MILLER

Holiday Inn Express | Grover Beach
Appointed Grover Beach Seat (— June 2024)

AMIT PATEL

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

NIPOOL PATEL

Lamplighter Inn & Suites | San Luis Obispo
Elected Designated At-Large Seat (— June 2022)

VICTOR POPP

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

MATT WILKINS**

La Cuesta Inn | San Luis Obispo
Appointed SLO TBID Seat (— June 2024)

OPEN SEAT | ARROYO GRANDE

Appointed Arroyo Grande Seat (— June 2024)

*Resigned October 2021

**Resigned March 2022

Marketing Committee

ASHLEE AKERS

Partner & VP of Client Services | Verdin
(— June 2023)

JIM ALLEN

Director of Marketing & Communications | Hearst
Castle (— June 2022)

AUDREY ARELLANO

Brand Manager | Cambria Inns Collection
(— June 2023)

TERRIE BANISH*

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

NICOLE MOORE*

Interim President & CEO | South County Chambers
of Commerce

MOLLY CANO*

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 2024)

KATHLEEN NAUGHTON

Executive Director | SLO Coast Wine Collective
(— June 2024)

JOEL PETERSON

Executive Director | Paso Robles Wine Country Alliance
(— June 2023)

LINDSEY ROBERTS

Director of Marketing | Martin Resorts (— June 2024)

LYNETTE SONNE

Founder & Herd Boss | FARMstead ED/SLO Co Farm Trail
(— June 2024)

JOHN SORGENFREI

President & Owner | TJA Advertising (— June 2022)

JILL TWEEDIE

Founder & President | Breakaway Tours Wine & Events
(— June 2022)

MICHAEL WAMBOLT*

Executive Director | Visit Morro Bay

Board, Committees & Team Continued

Team

CHUCK DAVISON

President & CEO

CATHY CARTIER

Chief Marketing Officer

TRACY CAMPBELL

VP of Community Engagement & Advocacy

DAVID FIELDS

VP of Finance & Operations

JESSIE BORCHIN

Office Manager

KRISTEN BUHRING

Sales Manager

CATHERINE CROPP

Digital Content Producer

RILEY GRIM

Brand Marketing Manager

TREVOR LYNCH

Director of Marketing

MELISSA MURRAY

Project Manager, Destination Management

THERESA NAGAI

Marketing Coordinator

ERIC PARKER

PR & Communications Manager

EMILY RUDGE

Executive Assistant to the President & CEO

CAMILLE SILVERA

Content Marketing Specialist

Advisory Committee

WADE HORTON

County Administrative Officer | County of San Luis Obispo

LYNN COMPTON

Supervisor, District 4 | County of San Luis Obispo

WHITNEY MCDONALD

City Manager | City of Arroyo Grande

LAN GEORGE

Councilmember | City of Arroyo Grande

RACHELLE RICKARD

City Manager | City of Atascadero

HEATHER NEWSOM

Mayor Pro Tem | City of Atascadero

MATTHEW BRONSON

City Manager | City of Grover Beach

DANIEL RUSHING

Councilmember | City of Grover Beach

SCOTT COLLINS

City Manager | City of Morro Bay

JENNIFER FORD

Councilmember | City of Morro Bay

TY LEWIS

City Manager | City of Paso Robles

STEVE MARTIN

Mayor | City of Paso Robles

JIM LEWIS

City Manager | City of Pismo Beach

SCOTT NEWTON

Councilmember | City of Pismo Beach

DEREK JOHNSON

City Manager | City of San Luis Obispo

ERICA STEWART

Mayor | City of San Luis Obispo



Strategic Direction 2023

In the spring of 2020, Visit SLO CAL partnered with Coraggio Group to develop Strategic Direction 2023 (SD 2023), the strategic plan and north star by which the organization will operate over the following three years. Following the success of Strategic Direction 2020, SD 2023 was advised by 170 survey responses, a dozen investor interviews, five regional engagement sessions and four half-day work sessions that included additional opportunities for investor, partner and stakeholder feedback.

Vision

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

Mission

Inspire travel and foster our unique experiences to create lifelong ambassadors and economic growth for SLO CAL

Values

STEWARDSHIP

We are mindful of our resources and seek to enhance the SLO CAL lifestyle

AUTHENTICITY

We are attuned to our own well-being and strive to bring the SLO CAL brand to life

INCLUSION

We engage and collaborate with an array of voices and perspectives

DRIVE

We bring enthusiasm to our work and prioritize initiatives to achieve results

FUTURE FOCUS

We deliver today with an innovative eye on tomorrow



Reputation

- Visionary
- Strategic
- Collaborative
- Creative
- Responsive
- Essential

Position

To best support SLO CAL's tourism economy, Visit SLO CAL provides:

- Strategic research and vital tourism knowledge to investors, partners, stakeholders and communities
- A long-term, collaborative and holistic road map that enables success for our community
- High-quality and high-impact marketing and sales initiatives tailored to reach regional, national and international target markets
- Leadership in destination management and community engagement to enhance quality of life for residents and quality of experience for visitors

Imperative 1 Objective:

Continue to build an engaged, best-in-class team

KEY RESULTS

- Assess and refine interdepartmental communication and processes
- Develop and enable our team
- Foster an engaged and focused team culture
- Fill open positions by December 31, 2021
 - Public Relations & Communications Manager
 - Director of Marketing
 - Finance & HR Manager
 - Executive Assistant to the President & CEO
 - Marketing Coordinator
- Achieve quarterly employee Net Promoter Score (eNPS) of 60 or higher
- Ensure 90% of candidates state they had a professional, well-organized recruitment experience, even if Visit SLO CAL does not extend an offer or hire them
- Ensure 100% of new hires state their onboarding experience was good or great
- Ensure 100% of team members score and reestablish their key results within three weeks of each quarter ending

Imperative 2 Objective:

Activate a House of Brands strategy that creates a pathway for community adoption and increased visitation to and within the county

KEY RESULTS

- Achieve adoption of Phases 1-3 of House of Brands strategy by all local destination partners by June 30, 2022
- Complete visitor profile study and personas by September 30, 2021
- Complete Equity, Diversity and Inclusion Audience and Asset Alignment Study by September 30, 2021
- Identify key assessment metrics quarterly in order to evaluate, monitor and pivot

Imperative 3 Objective:

Implement recovery and resiliency planning initiatives

KEY RESULTS

- Achieve 60 new partner registrations for SLO CAL Crafted by December 31, 2021, and 20 registrations per quarter, beginning Q2
- Launch Events & Festivals Strategy by May 31, 2022
- Launch Customer Service Training Initiative by May 31, 2022
- Develop pathway, toolkit and engagement opportunities for unified advocacy voice by February 28, 2022
- Develop and launch Xplorit virtual site inspection program by November 30, 2021

Imperative 4 Objective:

Increase engagement with investors, partners, stakeholders and communities

KEY RESULTS

- Onboard 96 new partners by June 30, 2022
- Achieve average engagement of 2+ actions for all partners monthly
- Increase Net Promoter Score (NPS) to 40 as defined by biannual survey (2020 = NPS 27)
- Achieve score of 75% or higher (by June 30, 2022) on resident approval of Visit SLO CAL's efforts to maintain or improve resident quality of life

Why Tourism Matters



TRAVEL SPENDING

\$1.78B ↑ **32.2%**
INCREASE YOY

\$4.9M
a day

\$203K
an hour

\$3.4K
a minute

\$56
a second



INDUSTRY EARNINGS



\$760M

↑ **15.9%** INCREASE
YOY

TOURISM PUTS



19,760 ↑ **11.6%**
INCREASE YOY

RESIDENTS TO WORK EACH DAY

DIRECT SPENDING BY SECTOR

LODGING



\$657M

FOOD SERVICE



\$448M

RETAIL



\$223M

RECREATION



\$171M



TOURISM CONTRIBUTES



\$58.7M ↑ **64%**
INCREASE YOY

IN TRANSIENT OCCUPANCY TAX REVENUE

WITHOUT VISITORS
EACH SLO CAL HOUSEHOLD
WOULD NEED TO SPEND
AN ADDITIONAL **\$16,753**

TO CREATE THE SAME ECONOMIC BENEFIT
for the community

**TRAVEL
SPENDING
CREATED**

\$104M

IN LOCAL
TAX REVENUE

which could cover the expenses for



968 POLICE OFFICERS'
SALARIES

OR



1,198 FIREFIGHTERS'
SALARIES

OR



2,208 TEACHERS'
SALARIES

OR



167 MILES OF 2-LANE
RESURFACED ROADS

WITHOUT STATE & LOCAL TAX REVENUE
GENERATED BY TRAVEL & TOURISM

EACH SLO CAL HOUSEHOLD WOULD



PAY AN ADDITIONAL

\$1,751 in taxes

TOURISM COMPRISES **8.82%** OF COUNTYWIDE GDP

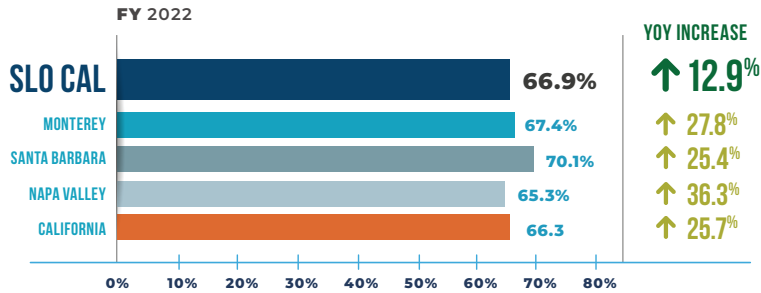
Tourism Data Insights

Visit SLO CAL has continued to work with local municipalities and the county to secure data on transient occupancy tax (TOT) by community that segments the unique lodging mix (hotels and motels, short-term rentals, bed and breakfasts and RV parks). Visit SLO CAL continues to provide a weekly/monthly STR (Smith Travel Research) report to its partners, while working with Tourism Economics to produce monthly business intelligence reports that combine the data from the TOT, STR, Arrivalist, VisaVue and the San Luis Obispo County Regional Airport. These reports provide partners and stakeholders a complete understanding of how the tourism industry is performing across the county. Visit SLO CAL partnered with Tourism Economics, Community Benchmark and Paso Robles Wine Country Alliance to produce the SLO CAL Wine Industry Report that features average sales, winery visitations and comparisons to the other wine regions in California.

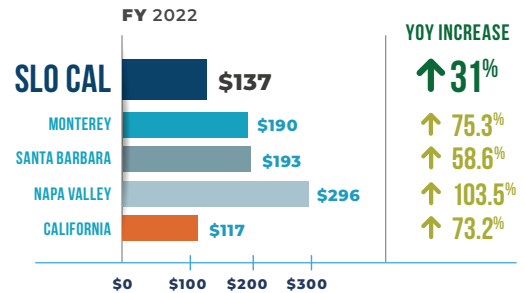


Data Reporting

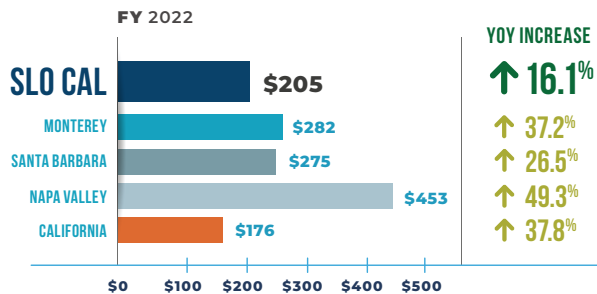
HOTEL OCCUPANCY OCC



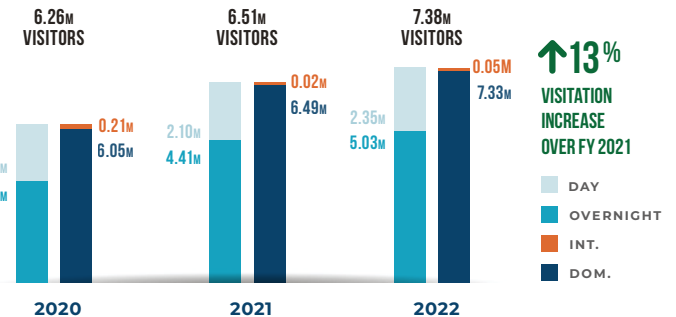
REVENUE PER AVAILABLE ROOM REVPAR



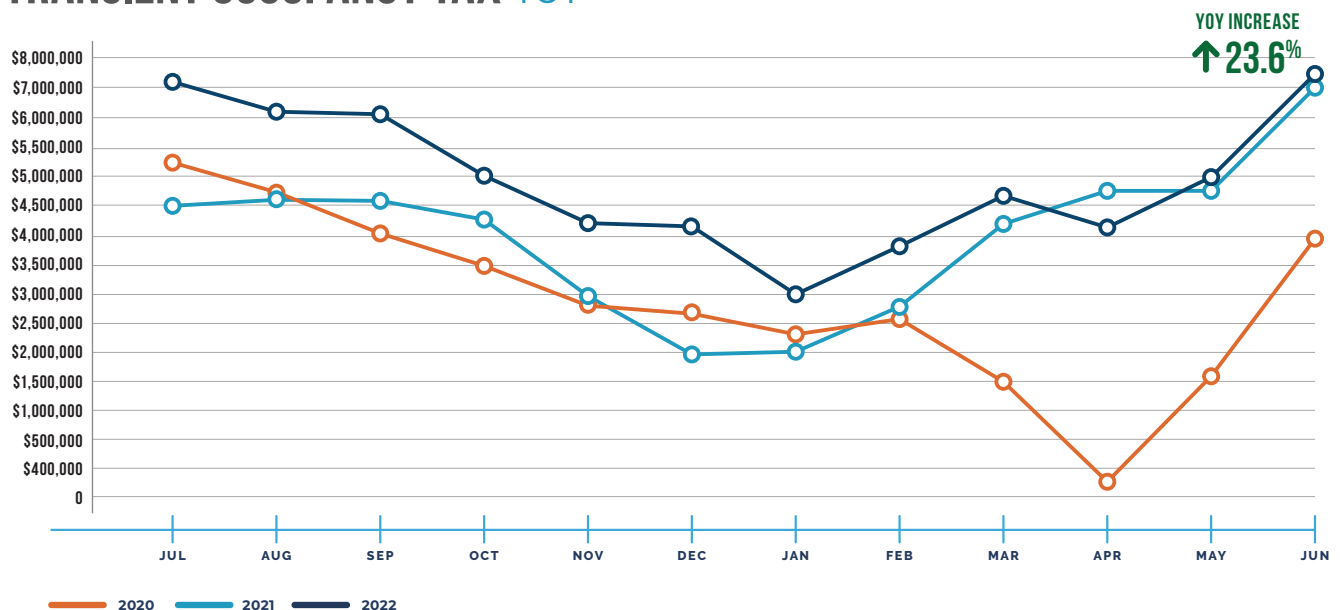
AVERAGE DAILY RATE ADR



VISITOR VOLUME



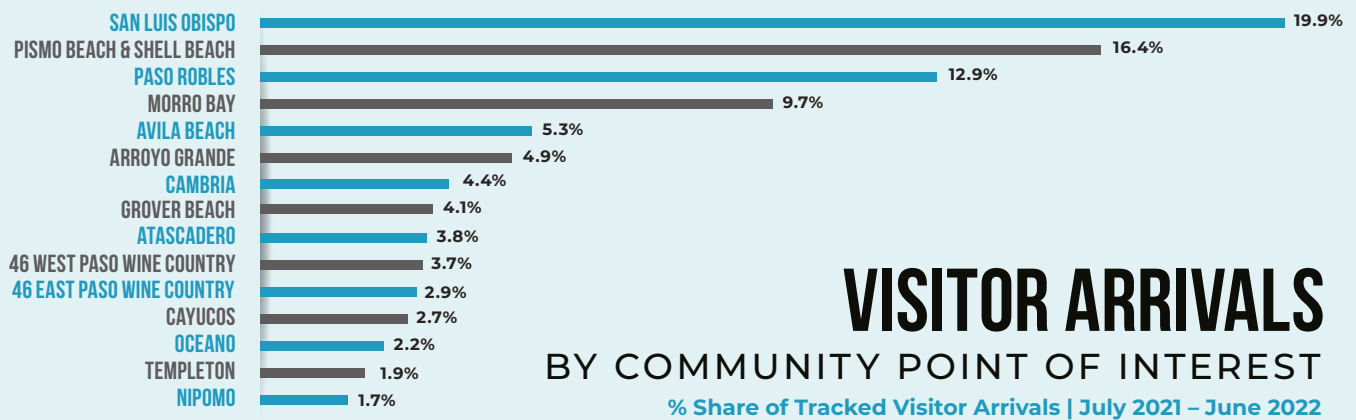
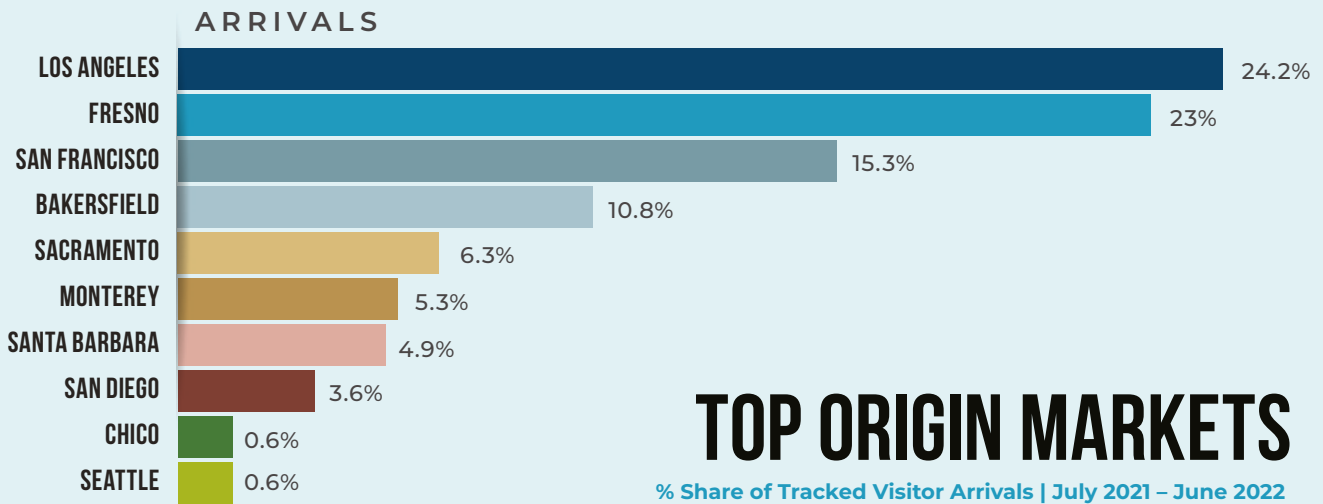
TRANSIENT OCCUPANCY TAX TOT



July 2021-June 2022 Source: STR Inc., Tourism Economics, Visit SLO CAL

Arrivalist

Partnering with Arrivalist, Visit SLO CAL offers insights to its partners and stakeholders on visitor arrivals to San Luis Obispo County. These insights highlight key points of interest (POI) visited, arrival windows, arrival origins, cross-visitation, length of stay and campaign lift as a result of paid media and organic traffic, which informs and reports on Visit SLO CAL's advertising efforts.



CROSS-VISITATION

1.33 COMMUNITIES PER
UNIQUE ARRIVAL

July 2021 – June 2022

LENGTH OF STAY

1.54 DAYS

July 2021 – June 2022

Source: Arrivalist

Sales

Visit SLO CAL shifted back to its traditional pre-COVID sales strategy targeting in-state, national and international trade, along with regional associations and corporate businesses in SLO CAL's drive markets. With significant changes in staffing across the industry, Visit SLO CAL remained focused on educating tour operators and travel advisers who sell domestic and international travel to California, while partnering with understaffed lodging investors to reconnect to lost segments of business. Visit SLO CAL reactivated international markets, including its partnership with Black Diamond in the UK and Ireland, with a March 2022 sales training and PR mission and a CEO Mission to Mexico with Visit California. The Visit California Luxury Travel Forum, an RFP won by Visit SLO CAL and originally scheduled for fall 2021, was rescheduled to October 2022.

EVENTS

2021

SEPTEMBER

IPW

NOVEMBER

National Tour Association's
Travel Exchange

DECEMBER

Luxury Travel Forum
CalSAE

2022

FEBRUARY

GoWest Summit

MARCH

UK Sales Mission
Mexico CEO Mission

APRIL

UK Familiarization Tour

JUNE

IPW

277

APPOINTMENTS

6

TRADE SHOWS

191

LEADS

444

BUYERS TRAINED



Earned Media

Visit SLO CAL worked hand in hand with Visit California, local destination partners, investors and partners to engage with members of the press through in-market meetings, press events, media mailers and familiarization (FAM) tours. In addition to attending several media events such as International Media Marketplace, Visit California's Mexico mission and IPW, Visit SLO CAL also participated in missions in Portland, Seattle and Denver. Visit SLO CAL worked with agencies Turner PR and Black Diamond to bring several media FAM tours to market. As flight restrictions lifted, Visit SLO CAL worked closely with Black Diamond to increase its presence in both the UK and Ireland and to increase its share of voice as international travel resumed. Nearly 20 media mailings were sent to top-tier media supporting California Wine Month in addition to the expansion of SLO CAL Crafted, a program that highlights local businesses. Visit SLO CAL opened the RFP process for domestic representation in the new fiscal year, resulting in securing new representation with MMGY-NJF for FY 2023.

DOMESTIC
100 ARTICLES
\$2.1M AD VALUE EQUIVALENCY
1.4B IMPRESSIONS



LOCAL
24 ARTICLES
\$201k AD VALUE EQUIVALENCY
8.4M IMPRESSIONS



INTERNATIONAL
71 ARTICLES
\$1.1M AD VALUE EQUIVALENCY
86M IMPRESSIONS



TOTAL

195 ARTICLES

\$3.5M AD VALUE EQUIVALENCY

1.14B IMPRESSIONS



Notable Articles

FORBES – JULY 2021

"24 Hours in Cambria, Central California's Underrated Coastal Gem"

IMPRESSIONS – 24.8M

MEN'S JOURNAL – AUGUST 2021

"Take a Walk on the Wild Side with These Awesome Animal Encounters"

IMPRESSIONS – 1.6M

BARRON'S PENTA – SEPTEMBER 2021

"Great Escapes: A Different Kind of Wine Country in SLO CAL"

IMPRESSIONS – 5.9M

AFAR – OCTOBER 2021

"9 Easy Weekend Trips from San Francisco"

IMPRESSIONS – 1M

DAILY EXPRESS – OCTOBER 2021

"Wined down in California - Holidays at the relaxed West Coast with a view of the Pacific"

CIRCULATION – 46M (BD)

METRO UK – NOVEMBER 2021

"Kitschy hotels, sea otters and wine: What it's like to take a road trip in San Luis Obispo County, California"

CIRCULATION – 24.1M (BD)

FOOD & WINE – DECEMBER 2021

"These Will Be the Biggest Drink Trends of 2022, According to the Pros"

IMPRESSIONS – 8M

CONDÉ NAST TRAVELER – JANUARY 2022

"The Best Things to Do in San Luis Obispo, California, from Historic Missions to Kelp Foraging"

IMPRESSIONS – 2.7M

DAILY MAIL – JANUARY 2022

"Take it slow in SLO CAL: Forget the bright lights of Hollywood and the bustle of Silicon Valley and make a beeline for a sleepy stretch of California"

CIRCULATION – 7.4M (BD)

THE WALL STREET JOURNAL – FEBRUARY 2022

"Four Scenic Road Trips Tailored for This Spring"

IMPRESSIONS – 31.7M

TRAVEL + LEISURE – APRIL 2022

"The Best Places to Travel in June 2022"

IMPRESSIONS – 5M

SMITHSONIAN – JUNE 2022

"The 15 Best Small Towns to Visit in 2022"

IMPRESSIONS – 6.7M

AFAR **METRO** **Forbes** **FOOD&WINE** **MEN'S JOURNAL** **Daily Mail**

UK FAM

Visit SLO CAL welcomed international media to SLO CAL in April 2022. Eight attendees (four media, four trade) were joined by respective agency reps for a four-day immersion of SLO CAL, covering eight SLO CAL destinations and signature events, including a bonfire and drive on the Oceano Dunes, a wine country 4x4 excursion, a cave tour and horseback riding through the vines as well as a chef-curated dinner at a SLO Coast winery. The event has secured multiple pieces of social, digital and print coverage.

SLO CAL Crafted Influencer

To support the expansion of the SLO CAL Crafted program, Visit SLO CAL welcomed a gift-wrapping influencer to SLO CAL in time for the holiday shopping season. The campaign exposed SLO CAL Crafted artisans and makers to a large social following, while filming at some of SLO CAL's most iconic destinations. In all, the campaign earned 559.5K impressions, 21.1K engagements, and 2.1M in reach.

Owned Media

Visit SLO CAL prioritized updating the look and feel of all owned media. Beginning with a complete brand update and redesigned website, Visit SLO CAL created a more accurate representation of the destination. By partnering with local artists like Christopher Petro and Acacia Productions, Visit SLO CAL was able to enhance its owned media catalog with high-quality, branded imagery in an effort to expose the destination, investors and partners to new audiences. A social media strategy was also created with its social media agency partner, Pensara, to drive increased exposure and engagement on all social channels. The full social strategy will be implemented in FY 2023.

FY 2022 SLOCAL.COM SNAPSHOT

1.97M **↑46%**
INCREASE YOY
SESSIONS

610k **↑26%**
INCREASE YOY
ORGANIC SESSIONS

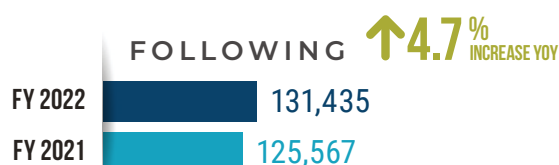
175k **↑30%**
INCREASE YOY
PARTNER REFERRALS

2.5k **↑80%**
INCREASE YOY
E-NEWSLETTER SUBSCRIPTIONS

27% **↑46%**
INCREASE YOY
E-NEWSLETTER OPEN RATE

7.6k **↑82%**
INCREASE YOY
VISITOR MAGAZINE REQUESTS

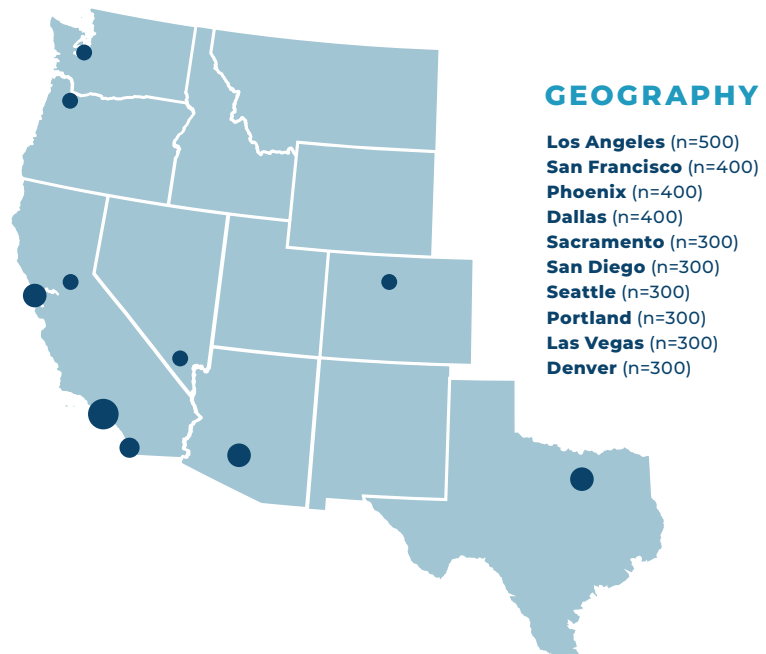
SOCIAL



Brand Awareness Study

Visit SLO CAL engaged Heart+Mind Strategies to conduct a Brand Awareness Study to determine the impact of the “Land of” campaign on key performance indicators and assess return on investment. The campaign ran mid-September to December 2021 and mid-January to April 2022.

METHODOLOGY



Key Takeaways

- Los Angeles travelers are most likely to recall the ads.
- The ads are universally well liked, with 97% having a favorable impression of the ads.
- Viewers of the ads take away the intended messaging that life is too beautiful to rush and widely agree that the ads encourage travelers to slow down, enjoy life, and be aware of the sights and sounds around them. Most also agree that the ads evoke a simpler time.
- Ad awareness has a positive impact on all brand and visitation metrics.
- Those recalling the ads indicate much higher travel intent, both in the near term (3-4 months) and longer term (next 12 months).
- Those who recall the ads are more likely than average to have visited, and when they do visit, they stay for more nights and spend more money.
- Perceptions of SLO CAL are far more positive among those who have seen the ads.
- The ad campaign has an estimated net positive impact on economic contribution to SLO CAL and tax revenue.
- Examining past behavior (September 2021 – July 2022) and future booked visits of those recalling the ads, the campaign's expected economic contribution is estimated to be \$1.1B-\$1.4B.
- Expected room tax revenue generated by the campaign is estimated to be \$5.5M-\$6.9M.

Paid Media

Visit SLO CAL worked with its agency of record, The Shipyard, to produce all creative assets and to negotiate media buys for the organization. Visit SLO CAL and The Shipyard developed The Land of... campaign highlighting the various SLO CAL communities and experiences unique to each of them. Visit SLO CAL achieved 228M impressions and garnered 50.5M video views. Click-through rates of .57% also exceeded goals by .04%.

FY 2022 PAID MEDIA SNAPSHOT

 **\$3.2M**
SPEND

 **1.3M**
CLICKS

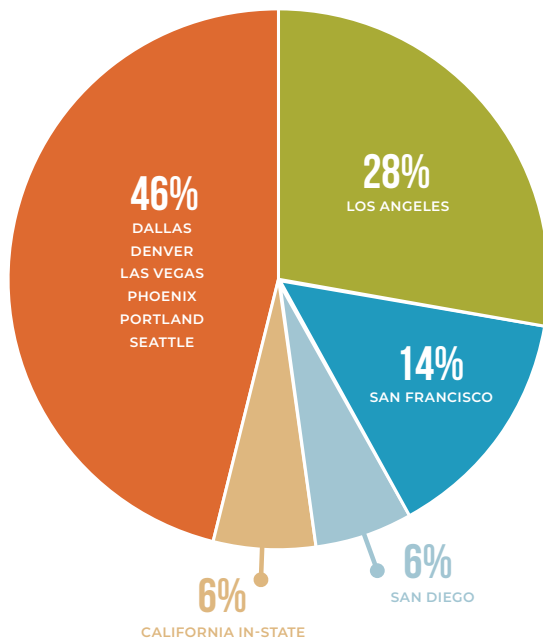
 **228M**
IMPRESSIONS

99%  **1%**
INCREASE YOY
VIDEO COMPLETION RATE

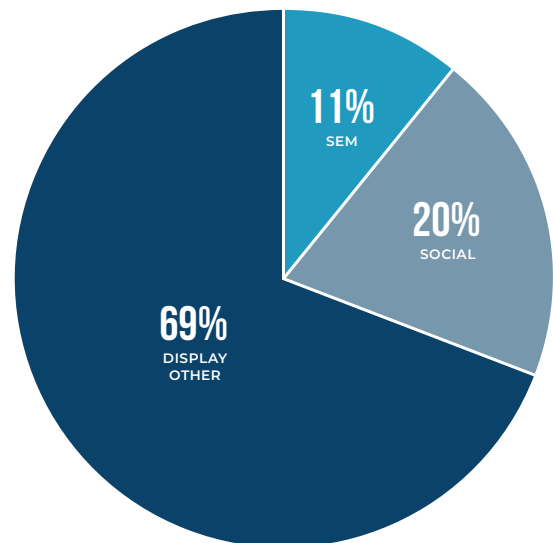
14%  **426%**
INCREASE YOY
CLICK-THROUGH RATE

\$0.96  **47%**
INCREASE YOY
COST PER CLICK

PAID MEDIA BY MARKET



BREAKDOWN BY CHANNEL



According to Arrivalist paid media resulted in an 196% lift in arrivals and -18% lift in length of stay compared to the control group that was not exposed to paid media in FY 2022.

Partner Engagement

Visit SLO CAL offered various engagement opportunities to investors and partners throughout the year, including tools and best practices to grow their business, exposure on SLOCAL.com and opportunities to reach new visitors. In FY 2022, Visit SLO CAL furthered its reach with the expansion of SLO CAL Crafted, a program that identifies and celebrates local artisan products made directly in SLO CAL. Visit SLO CAL also welcomed the first Spartan Race to the county in March of 2022, hosted January Restaurant Month and the annual San Luis Obispo International Film Festival, which gave partners additional opportunities to participate. It also supported the reopening of the county's renowned landmark, Hearst Castle in May of 2022.

SLO CAL Crafted

The SLO CAL Crafted program officially expanded in November 2021 with the intention of establishing SLO CAL as a destination filled with unique products and experiences worth traveling for. The program launched with a five-part video series that was so popular that Visit SLO CAL extended the series indefinitely. The videos highlighted farmers, crafters, makers and artists across the county, keying in on their unique crafts and the community that has embraced their business. Visit SLO CAL now has 79 certified partners, surpassing its goal for the year. All 79 partners have listings on SLOCAL.com's specially branded SLO CAL Crafted website landing page, directly connecting consumers with local businesses.

Restaurant Month

Visit SLO CAL hosted Restaurant Month in January, highlighting SLO CAL's culinary experiences during the shoulder season. Forty-five restaurants throughout the county offered a variety of different deals, including three-course, prix fixe meals between \$39 and \$59 and other discounts. The FY 2022 campaign included an emphasis on the variety throughout the county, as well as additional targeted advertising to support the restaurant community.

RESTAURANT MONTH

45 PARTICIPATING RESTAURANTS

10.5k
SESSIONS

5.78 PAGES AVERAGED
PER SESSION FROM LANDING PAGE VISITORS

9.8k **↑85%**
PARTNER REFERRALS INCREASE YOY

7:40 **AVERAGE TIME** **↑374%**
ON LANDING PAGE INCREASE YOY



2.9k **ORGANIC**
IMPRESSIONS

41.5k **PAID**
IMPRESSIONS



12k **ORGANIC**
IMPRESSIONS

Partner Engagement Continued

Spartan Race & SLO CAL Open

Visit SLO CAL brought the first-ever Spartan Race to the county in March 2022. Approximately 9,500 athletes, spectators and volunteers gathered on the Santa Margarita Ranch to bring the spectacle to life. This event attracted a wide range of visitors with the majority of the athletes traveling from at least 100 miles and lodging in SLO CAL. Beyond the incoming visitors, event advertising had a wide digital reach. Spartan's social media coverage of the weekend had a reach of over 1 million.

Visit SLO CAL partnered with the World Surf League and Surfing for Hope to bring the 2022 SLO CAL Open to the county. The series consisted of two surfing competitions, the SLO CAL Open Pismo Beach on Jan. 27-30 and the SLO CAL Open Morro Bay on Feb. 24-27.

The 2022 SLO CAL Open Pismo Beach witnessed notable coverage throughout the event window with local and regional TV pickup along with a live webcast audience. The total views across the multiple platforms equaled an impressive 321K total, with spikes in viewership at the event start. The event also received TV coverage from local and regional news including KSBY, KCOY and KEYT, which picked up coverage three of the four days of the competition. Regional winners kept coverage primarily to California news reaching over 1M.

The 2022 SLO CAL Open Morro Bay garnered solid coverage throughout the event window and notched higher numbers across the board. An impressive viewing for the event webcast accrued nearly 1M impressions and 250K views. KSBY, MSN, Santa Cruz, Encinitas and more hyperlocal outlets posted contest coverage throughout the window.

Film SLO CAL

Film SLO CAL, a division of Visit SLO CAL, and the film commission for San Luis Obispo County, promotes, facilitates and tracks film production throughout San Luis Obispo County. Film SLO CAL was proud to earn a board seat on Film Liaisons in California Statewide (FLICS), a professional association of 40+ film commissions. In association with Film SLO CAL's partnership with the San Luis Obispo International Film Festival, a scouting FAM tour was hosted for five active film professionals associated with Film California, Teamsters Local 399 and Location Managers Guild International. Notable top productions included the series finale of "This Is Us" (NBC), a fashion shoot for Hollister Co. and commercials for Nissan, Jeep, Porsche, Ford and Toyota.



54 PRODUCTIONS



93 FILMING DAYS



62 LEADS



\$581k ESTIMATED SPEND
IN SLO CAL





Advocacy

Visit SLO CAL advocates for local, state and federal policies that enhance the region's economic vitality and resident quality of life. It ensures the tourism industry's perspectives are being considered when key policy issues are being discussed and works collaboratively with partners and stakeholders to develop innovative, sensible policy solutions.

Industry Advisory Group

Visit SLO CAL hosted a biannual Industry Advisory Group meeting with Congressman Salud Carbajal (24th District). This gave lodging property owners the opportunity to voice their COVID-19 recovery needs and discuss other key priorities. These include eliminating U.S. inbound testing requirements to restore international travel, easing H-2B visa restrictions for nonimmigrant workers and reevaluating below-market lodging per diem rates for federal employees. National electric vehicle infrastructure and charging standards were also discussed.

In June 2022, lodging property owners met with California State Assembly Member Jordan Cunningham (35th District). Top advocacy issues addressed with the Assembly Member were pandemic recovery funding for the tourism industry as part of the FY 2022-2023 California State Budget, as well as the challenge of rapidly increasing fire insurance premiums for commercial property owners as a result of California's ongoing drought. Lodging owners addressed submarket lodging per diem rates for visiting state employees needed to advance the county's economic future in green energy, agribusiness and education sectors, among others. Electrical vehicle charging standard legislation and California's growing power supply needs were also discussed.

Tourism Advocacy Partnerships with Cal Travel & U.S. Travel

One of Visit SLO CAL's top advocacy priorities is being part of a unified industry voice when elected leaders are discussing issues impacting tourism. Visit SLO CAL partners with the industry's leading advocacy organizations, the California Travel Association (Cal Travel) and the U.S. Travel Association, to provide public support or opposition to state and national legislation and policies.

Visit SLO CAL President & CEO Chuck Davison serves as Vice Chair of Cal Travel. Tracy Campbell, Visit SLO CAL's Vice President of Community Engagement & Advocacy, serves on the Government Relations Committee. Working closely together and with industry advocacy partners, Visit SLO CAL is actively representing the interests of investors, stakeholders and partners.

Advocacy Support & Engagement

In 2022, Visit SLO CAL engaged with lawmakers to advocate for policy issues and legislation to advance the economic interests of tourism in SLO CAL. Visit SLO CAL delivered more than a dozen advocacy letters and presented testimony at hearings on key industry issues: support for Vandenberg Space Force Base to be STARCOM headquarters, short-term vacation rentals, rural camping ordinances, grant funding for a local infrastructure project, special event permitting, state and federal employee lodging per diem rates, craft distillery shipping regulations and a renewal of one city's Tourism Business Improvement District.

Oceano Dunes Economic Impact Study

Due to pandemic recovery efforts, the Oceano Dunes Economic Impact Assessment was postponed until FY 2023.

Equity, Diversity & Inclusion

Visit SLO CAL holds itself accountable to continuous improvement in equity, diversity and inclusion (EDI) through awareness and regular reporting to the board of directors. Visit SLO CAL took a leadership role in ensuring the organization and its communities continue to expand efforts in making SLO CAL an inclusive place for both visitors and residents alike. Visit SLO CAL continued its efforts to build a more inclusive culture to ensure that all who travel through the county feel seen, welcomed and embraced.

Organizational Culture

Visit SLO CAL's President & CEO completed a 12-month EDI Leadership Master Class through Destinations International to expand his knowledge base and identify opportunities for organizational improvement. This leadership series included virtual sessions designed around the topics of

emotional intelligence, effective communication, microaggressions, unconscious bias and allyship. This initial investment for Visit SLO CAL will assist internal and external efforts in supporting the advancement of a diverse workforce and a richer community.



Equity, Diversity & Inclusion Continued

Creating Authentic EDI Content & Marketing Experiences

In FY 2022, Visit SLO CAL conducted an EDI Audience and Asset Alignment Study and Future Visitor Profile Study. The insights gained from these studies highlighted that diverse audiences are a culmination of experiences and characteristics that often share more similarities than differences. Meeting the needs and expectations of these audiences requires an understanding of how groups of people view the destination — and appreciating differences in what makes the

destination appealing, safe and welcoming. Using learnings gained from these studies, Visit SLO CAL developed a diversity and inclusion marketing strategy to attract diverse visitors to SLO CAL and tailor destination content to meet their needs. Visit SLO CAL offered a co-op opportunity to its destination partners, six of whom participated, to learn more about their specific communities and better inform their marketing efforts.

BRAND RESEARCH: EQUITY, DIVERSITY AND INCLUSION ASSET ALIGNMENT STUDY

People are multidimensional, sharing more similarities than differences, with some nuances in what makes SLO CAL appealing.



Being Welcoming is More Important than Being Diverse

Diverse representation in marketing is important to EDI groups; seeing “people who look like me” is most important to Black travelers.

BLACK TRAVELERS

TOP 3 RATED ATTRIBUTES	LOWER RATED OPPORTUNITIES
1. Fun	1. Authentic
2. Rich history & heritage	2. Friendly, accepting place
3. Amazing scenery	3. Place to be refreshed

HISPANIC TRAVELERS

TOP 3 RATED ATTRIBUTES	LOWER RATED OPPORTUNITIES
1. Fun	1. Accepting & inclusive
2. Unique vibe	2. Value for the money
3. Big-time natural beauty	3. Easy to get around

ASIAN TRAVELERS

TOP 3 RATED ATTRIBUTES	LOWER RATED OPPORTUNITIES
1. Amazing scenery	1. Fun
2. Big-time natural beauty	2. Place with lots to see/do
3. Charming	3. Makes me feel welcome

LGBTQ+ TRAVELERS

TOP 3 RATED ATTRIBUTES	LOWER RATED OPPORTUNITIES
1. Big-time natural beauty	1. Accepting & inclusive
2. Relaxing	2. Great family place
3. Fun	3. Friendly, accepting place

Owned Media

Visit SLO CAL spotlighted EDI on owned channels, with blog features and social media promotions pointing back to SLOCAL.com. With the goal of bringing authentic faces and stories of SLO CAL to life, Visit SLO CAL worked with local EDI community-based organizations to promote inclusive cross-visitation opportunities for tourists looking to support Latinx Heritage Month, Women's History Month, Black History Month, Asian American and Pacific Islander (AAPI) Heritage Month, Pride Month and International Day of Persons with Disabilities. All profiles are archived on an EDI landing page as well as on Visit SLO CAL's social media channels.

EDI-Focused Community Relations

Visit SLO CAL is committed to ensuring a positive visitor experience and an enhanced resident quality of life by participating in conversations and industry forums that proactively work to create a better experience for all people. Through partnerships and collaborations with local organizations like R.A.C.E. Matters SLO and Gala Pride & Diversity Center, Visit SLO CAL is continuing to advance EDI principles with employees, lodging investors, destination partners, stakeholders and residents.

LOWER FAMILIARITY =
LOWER RATINGS

4.15

VS.

3.63

General Population visitors
rate SLO CAL attributes
higher than EDI groups

LOW FAMILIARITY BUT HIGH APPEAL AMONG EDI GROUPS

VERY/SOMEWHAT FAMILIAR

41% B
42% PD
53% H
54% LGBTQ+
57% A

VERY/SOMEWHAT APPEALING

92% B
93% H
95% PD
96% A
98% LGBTQ+

IDEAL TRIP IS SIMILAR ACROSS EDI GROUPS WITH KEY DIFFERENCES



B > BLACK H > HISPANIC PD > PEOPLE W/ DISABILITIES
A > ASIAN LGBTQ+

Experience SLO CAL 2050

Visit SLO CAL advanced key ESC 2050 recommendations — a customer service training for the SLO CAL Travel & Tourism Industry, new thematic routes developed to promote cross-visitation and a signed agreement between Visit SLO CAL and key partners and city/county stakeholders to further advance a countywide Events & Festivals Strategy.

Countywide Trail System

Visit SLO CAL involved trail organizations and stakeholders to gain a better understanding of the number of trails and what trail analysis information exists for every hiking, walking, biking, running and equestrian trail in SLO CAL. Moving forward, the information will be used to inform a joint strategy, marketing plan and advocacy approach for a connected SLO CAL that will benefit residents and visitors over the coming years.

Workforce Housing & Transportation

Visit SLO CAL engaged in several meetings and continued to partner with the broader Coalition of Housing Partners in exploring and creating strategies addressing the need for greater workforce housing availability. Visit SLO CAL also continued to advocate for and work with San Luis Obispo Council of Governments (SLOCOG) and the Regional Transit Authority (RTA), exploring transportation options and the potential for reallocating resources and assets to improve public, private and industry transportation for workers in travel and tourism.

Customer Service Training Initiative – SLO CAL Welcome

In the fall of 2021, Visit SLO CAL hired Calgary-based agency ICOM Productions to develop and implement the customer service training program, SLO CAL Welcome. A working group was convened, comprising of lodging investors and strategic partners, to help inform and drive the curriculum. Over the course of three facilitations that went into spring, learning objectives were identified for modules regarding general customer service, equity, diversity and inclusion (EDI), customer

service concepts specific to lodging, restaurants and experiential attractions and a destination-specific module on SLO CAL. Curriculum development has carried over to FY 2023, and the English and Spanish launches are planned for late fall 2022.

Events & Festivals Strategy

In early fall 2021, the countywide Events & Festivals Strategy initiative was split into two phases. For Phase I, a working group comprising destination partners, city and county stakeholders underwent three facilitation sessions to ensure strategic alignment on the overall objective — bringing positive economic contributions to SLO CAL and enhancing the quality of life for residents. In March 2022, a Commitment to Collaborate in the Development and Implementation of a Strategy for Tourism-Related Events and Festivals was signed by the destination partners and city and county stakeholders, concluding the first phase. In May 2022, Visit SLO CAL engaged MMGY NextFactor to successfully complete Phase II, the development and creation of the actual Events & Festivals Strategy and the implementation of the countywide events and festivals master calendar. Phase II completion is slated for late fall 2022.


Thematic Routes



Over the course of FY 2022, three new countywide thematic routes were identified and created to promote cross-visitation throughout SLO CAL — a Brewery Trail, a Sustainable Wine Trail and an Antiques Trail. Two additional trails were identified, a Mural Trail and a Film Trail, which will be created and promoted in FY 2023.



Air Service Development

With the San Luis Obispo County Regional Airport air service recovery strategy in place, Visit SLO CAL worked closely with the airport to strengthen supply and demand for the market. After the successful launch of the new service from San Diego and Portland in June 2021, Visit SLO CAL and the airport held an Alaska Airlines headquarters meeting in April 2022 to discuss current and future market growth. SLO CAL saw a 21% increase in seats in the calendar year 2021. The projected 720,000 in 2022 will be the highest seat capacity the airport has ever experienced. In November 2021, Visit SLO CAL began a strategic marketing partnership for the airport, leveraging its award-winning creative agency to amplify the community's air service. Beginning October 6, 2022, American Airlines plans to move to mainline service from Dallas utilizing the A319, which has 128 seats.

 **21% INCREASE**
IN SEATS vs. CY 2021

720,000  **1.8%**
PROJECTED SEATS ABOVE CY 2019
IN CY 2022 

Paso Robles Wine Country Alliance & SLO Coast Wine Collective

Visit SLO CAL continued to work closely with the Paso Robles Wine Country Alliance and the SLO Coast Wine Collective on promoting, featuring and celebrating the vineyards and experiences associated with the wineries in each region. By partnering with these groups, Visit SLO CAL has created the Wine Industry Report that features average sales, winery visitations and comparisons to the other wine regions in California.

International Visitors

As California continued to move to a post-pandemic mindset, Visit SLO CAL re-engaged Black Diamond for trade and public relations representation in the UK and Ireland. Additionally, Visit SLO CAL attended several international missions in Europe and Mexico to ensure that SLO CAL remained top of mind in these markets.



Key Moments

1.

In August 2021, Visit SLO CAL concluded two important studies: a Future Visitor Profile Study (VPS) and an Equity, Diversity and Inclusion (EDI) Audience and Asset Alignment Study. The VPS worked to measure post-COVID changes in travel attitudes and plans and provide visitor and trip characteristics. It also provided a road map for attracting potential visitors and explored the image of SLO CAL in comparison to its competitive set. The EDI Study, a first of its kind for Visit SLO CAL, worked to clarify SLO CAL's image among underrepresented travel populations and to establish an ideal trip for various travel groups. It also worked to identify gaps in product offerings to inform tourism development initiatives.

2.

In September 2021, Visit SLO CAL launched a new brand campaign, The Land of..., celebrating the multitude of experiences and kaleidoscope of cultures to be enjoyed against backdrops of vivid scenic splendor. The campaign captures the uniqueness of each region in the county and offers a range of Hero Brand and House of Brands advertising assets, including video, display, native and social, along with longer storytelling in the form of custom content.

3.

In January, Visit SLO CAL launched a new SLOCAL.com website, incorporating an accessible, content-first approach to expand upon the House of Brands strategy. The new website brings engaging video to the forefront of Visit SLO CAL's editorial footprint.

4.

In January, Visit SLO CAL hired Tracy Campbell as Vice President of Community Engagement & Advocacy and David Fields as Vice President of Finance & Operations. Campbell is a proven communications, advocacy and marketing strategist with experience in building brands and launching new products and programs. Fields is a seasoned finance and operations leader with experience as a nonprofit CFO, private company CFO and COO, and also worked in investment banking. These additions, along with the hiring of a Director of Sales, will round out the senior leadership team and ensure Visit SLO CAL is set up for future success.

5.

In March 2022, a Commitment to Collaborate in the development and implementation of a strategy for tourism-related events and festivals was signed by destination partners and city and county stakeholders. This countywide collaborative effort, part of Experience SLO CAL 2050, will result in a strategy to provide tools and resources to assist local communities.

6.

Visit SLO CAL launched Xplorit virtual site inspection technology to train meeting and conference planners, as well as showcase the destination to domestic and international trade and media. The tool brings SLO CAL to life and helps deepen awareness of the destination and the variety of experiences throughout the communities that make up the county.

Moving Forward

For FY 2023, Visit SLO CAL has defined four overarching objectives aligned with each of the four Strategic Direction 2023 imperatives, along with measurable key results for each objective. The efforts of each department for the coming year will ladder up from these objectives and key results.

Imperative 1 Objective:

Continue to build an engaged, best-in-class team

KEY RESULTS

- Refresh Net Promoter Score (NPS or equivalent) survey by July 31, 2022 and establish goals for FY 2023 and beyond
- Develop a strategy by September 30, 2022 to make Visit SLO CAL a desirable, sought-after place to work committed to Equity, Diversity and Inclusion (EDI) principles
- Fill open positions approved in FY 2023 budget by December 31, 2022

Imperative 2 Objective:

Advance the SLO CAL brand strategy to achieve increased visitation across the county

KEY RESULTS

- Develop cross-visitation strategies to achieve score of 2+ communities by July 31, 2022 and execute by June 30, 2023
- Complete advertising awareness study by August 31, 2022 and adjust campaign metrics accordingly
- Develop integrated brand voice and storytelling between paid, owned and earned channel activity by December 31, 2022
- Deliver and execute House of Brands “always on” core strategies by June 30, 2023





Imperative 3 Objective:

Advance resiliency planning initiatives

KEY RESULTS

- Create, rollout and achieve adoption of advocacy toolkit to advance the industry through formalized education on advocacy process and value by June 30, 2023
- Promote adoption of new Customer Service Learning Platform modules (beginning, intermediate, advanced and EDI) by 100 businesses and 350 individuals by June 30, 2023
- Identify new signature, SLO CAL-branded event opportunity by June 30, 2023
- Advance a plan for the development of a county-wide trail system by June 30, 2023
- Finalize and advance Air Service Recovery plan in partnership with SBP and Volare Aviation by June 30, 2023
- Develop and launch Phase 2 Xplorit virtual site inspection program to advance activities featured by June 30, 2023

Imperative 4 Objective:

Increase engagement with investors, partners, stakeholders and communities

KEY RESULTS

- Deliver Oceano Dunes Economic Impact & Mitigation Study by January 31, 2023
- Implement Resident Sentiment Survey to inform future marketing and advocacy objectives by February 28, 2023
- Onboard and engage 250 investors, partners, stakeholders and community members by June 30, 2023
- Increase Investor Net Promoter Score (NPS) to 50 as defined by biannual survey (2021 NPS = 47)



FY 2023 Budget

ESTIMATED COST OF
PROVIDING ACTIVITIES
IN THE NEXT FISCAL YEAR

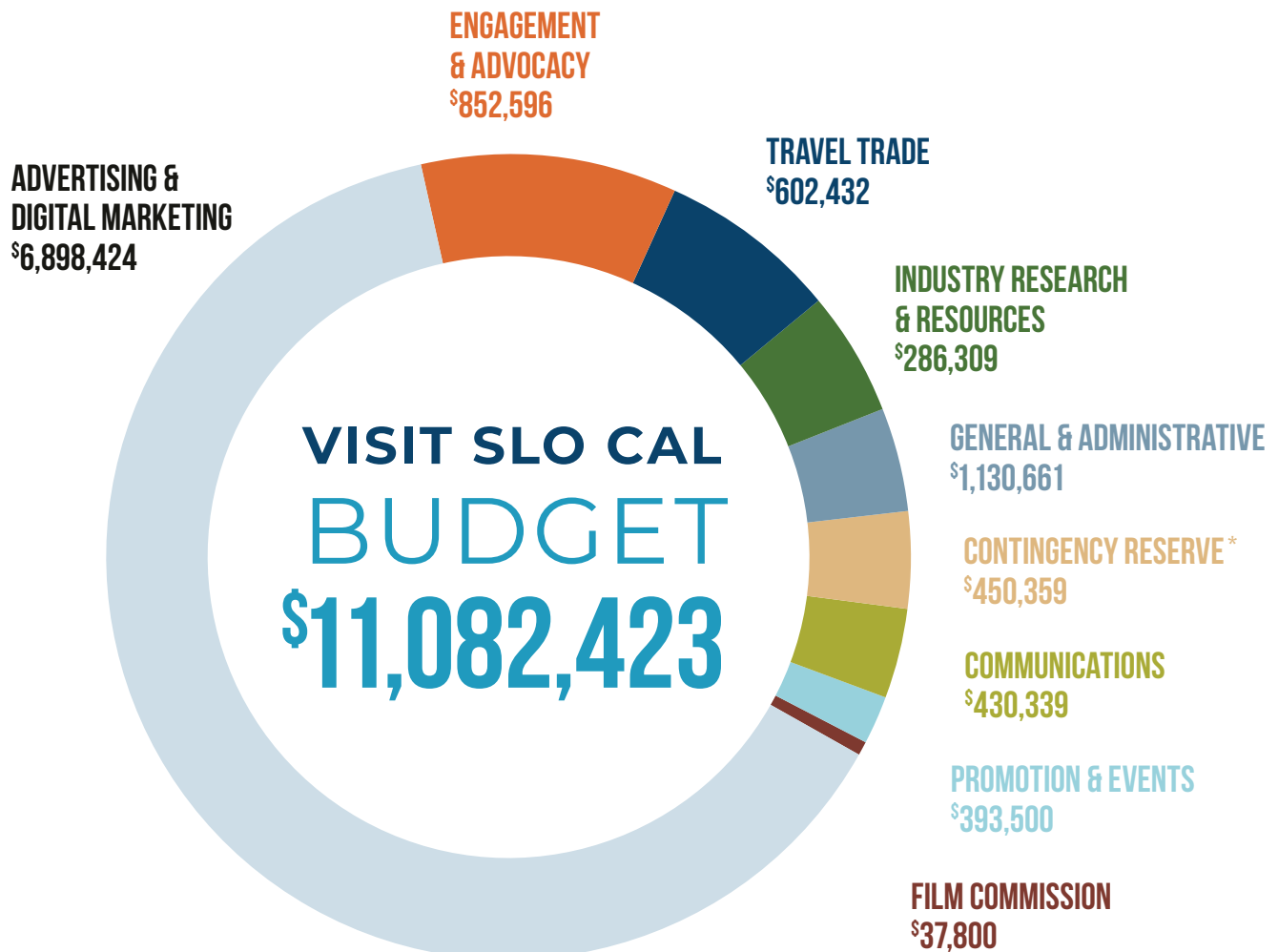
\$11,082,423

ESTIMATED
CONTRIBUTION FROM
NON-ASSESSMENT SOURCES

\$844,176

ESTIMATED FY 2022
SURPLUS CARRIED
FORWARD TO FY 2023

\$919,396



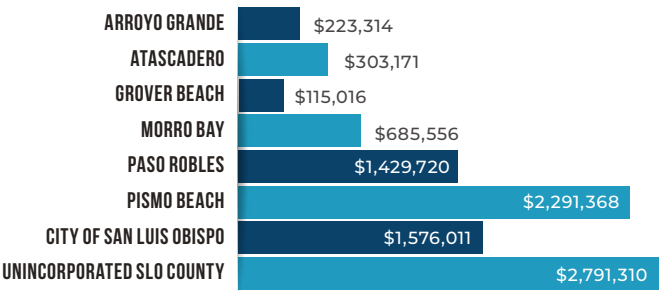
**Contingency funds reflect 5% of TMD revenue.*

Expenditures

Method of Basis of Levying Assessment

The annual assessment rate is 1.5% of gross short-term (stays 30 or fewer consecutive days) room rental revenue. The county and each city are responsible for collecting the assessment from lodging businesses within their respective jurisdictions on a monthly or quarterly basis, including any delinquencies, penalties and/or interest. Within 30 days of receipt, the county and each city then forward the assessments collected to the Tourism Marketing District (TMD) managed by Visit SLO CAL.

ASSESSED FUNDS FROM FY 2022



**ADVERTISING &
DIGITAL MARKETING**
\$6,209,462

GENERAL & ADMINISTRATIVE
\$610,879

CONTINGENCY RESERVE
\$471,440

TRAVEL TRADE
\$456,064

**ENGAGEMENT
& ADVOCACY**
\$449,266

COMMUNICATIONS
\$330,051

**INDUSTRY RESEARCH
& RESOURCES**
\$312,584

PROMOTION & EVENTS
\$229,006

FILM COMMISSION
\$23,220

**FY 2022
DETAILED
EXPENDITURES**



SLOCAL.COM

805-541-8000

