PAID MEDIA SNAPSHOT **IMPRESSIONS CLICKS** \$0.96 147% INCREASE YOY VIDEO COMPLETION RATE CLICK-THROUGH RATE COST PER CLICK SLOCAL.COM SNAPSHOT 1.97m 175k 30% 27% 46% INCREASE YOY SESSIONS PARTNER REFERRALS E-NEWSLETTER OPEN RATE INCREASE YOY E-NEWSLETTER ORGANIC SESSIONS SUBSCRIPTIONS VISITOR MAGAZINE REQUESTS SOCIAL O O O D FOLLOWING 14.7% CLICKS 122.8% 131.435 FY 2022 FY 2022 FY 2021 125.567 FY 2021 PARTNER ENGAGEMENT SIO (AL 79 CERTIFIED 10 - 10 CERTIFIED 79 PARTNERS VIDEOS SPARTAN RACE 1M 9.5K ATHIETES SPECTATORS & VOLUNTEERS IMPRESSIONS **SLO CAL OPEN** 506.8 IMPRESSIONS 658.2K VIDEO VIEWS **1M REACH IN MEDIA COVERAGE RESTAURANT MONTH 45** PARTICIPATING RESTAURANTS **10.5**K SESSIONS PARTNER REFERRALS AVG. TIME ON LANDING

PAID MEDIA BY MARKET **6**% **46**% 28% CALIFORNIA DALLAS LOS ANGELES IN-STATE DENVER LAS VEGAS **6**% PHOENIX 14%0 PORTLAND SEATTLE SAN FRANCISCO SAN DIEGO **BREAKDOWN BY CHANNEL 69**% 11% DISPLAY/ SOCIAL SEM OTHER According to Arrivalist paid media resulted in an 196% lift ir arrivals and -18% lift in length of stay compared to the contro group that was not exposed to paid media in FY 2022. SALES **277 APPOINTMENTS 6 TRADE SHOWS 191 LEADS 444 BUYERS TRAINED EARNED MEDIA 195 ARTICLES *** \$3.5M AD VALUE EQUIVALENCY **♦** 1.14B IMPRESSIONS FILM SIC (A] **FILM SLO CAL 54 PRODUCTIONS 93 FILMING DAYS**

- 66 62 LEADS
- **\$581**K ESTIMATED SPEND IN SLO CAL

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.

Customer Service Training Initiative - SLO CAL Welcome

Hired Calgary-based agency ICOM Productions to develop customer service training program, SLO CAL Welcome, to launch Fall 2022

Events & Festivals Strategy

- Fall 2022, Visit SLO CAL engaged Matthew Landkamer to facilitate sessions for a countywide events and festivals strategy
- March 2022, a Commitment to Collaborate was signed by destination partners and city and county stakeholders
- May 2022, Visit SLO CAL engaged MMGY NextFactor to complete the development and creation of the actual Events & Festivals Strategy

Paso Robles Wine Country Alliance & **SLO Coast Wine Collective**

Working with Tourism Economics, PRWCA and Community Benchmark, Visit SLO CAL created a Wine Industry Report that features average sales, winery visitations and comparisons to the other wine regions in California

Advocacv



2 in-person meetings with federal and state elected representatives

> 12 issue advocacy letters and industry engagements

3 government hearing expert testimonials

Key Advocacy Initiatives

Industry Advisory Group

Hosted meetings with lodging owners and elected representatives to address challenges facing tourism industry

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

VSC partners with the industry's leading advocacy organizations to create a unified voice on policies that impact the tourism industry

Advocacy Support & Engagement

Engaged with lawmakers on key industry issues such as support for Vandenberg Space Force Base to be STARCOM headquarters and state and federal employee lodging per diem rates

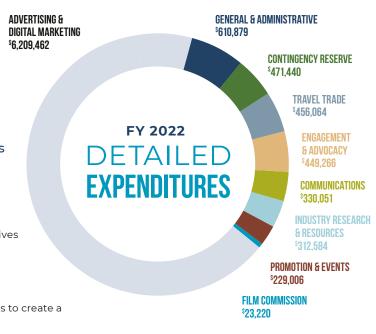
International Visitors

Visit SLO CAL re-engaged Black Diamond for trade and PR representation in the UK and Ireland and attended several international missions in Europe and Mexico

AIR SERVICE DEVELOPMENT



1.8% **ABOVE CY 2019 PROJECTED SEATS IN CY 2022**



YEAR IN REVIEW FY 2022





Strategic Direction 2023 Imperatives

Enhance Our Organizational Capacity and Culture

Amplify and Steward the SLO CAL Brand Through Unified Efforts

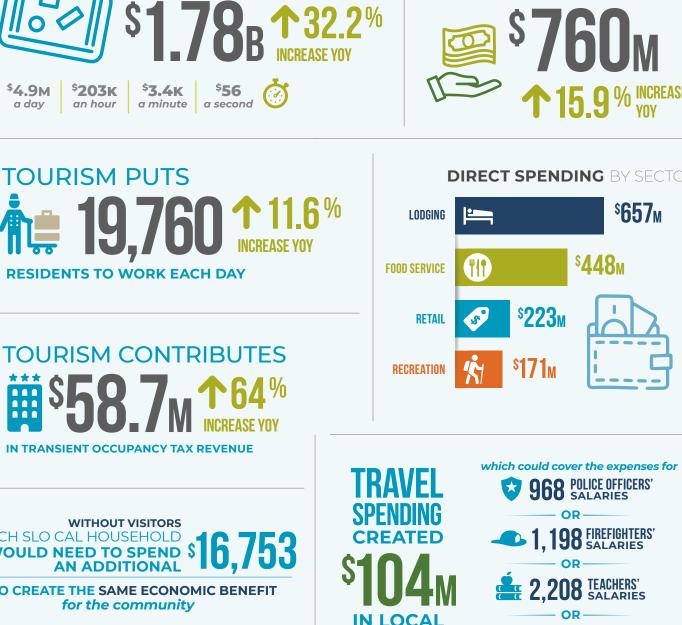
Lead the County Tourism Industry in a Collaborative Resilience Planning Effort

Demonstrate Value to Investors, Partners. Stakeholders and Communities

BRAND AWARENESS STUDY AUDIENCE **15 MINUTE** 1111 N=3,500 **50+ MILES** RAVELED FOR LEISUR **GEOGRAPHY** Los Angeles (n=500) San Francisco (n=400) Phoenix (n=400) **Dallas** (n=400) Sacramento (n=300 San Diego (n=300) Seattle (n=300) Portland (n=300) Las Vegas (n=300) Denver (n=300)

Why Tourism Matters







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



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January-December 2021 Source: Visit SLO CAL, Dean Runyan Economic Impact Report, County of San Luis Obispo,
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BRAND RESEARCH: EQUITY, DIVERSITY AND INCLUSION ASSET ALIGNMENT STUDY

BLACK TRAVELERS

IP 3 RATED ATTRIBUTES	LOWER RATED OPPORTUNITIES
Fun Rich history & heritage	 Authentic Friendly, accepting place

3. Amazing scenery

ASIAN TRAVELERS

TOP 3 RATED ATTRIBUTES

- 1. Amazing scenery
- 2. Big-time natural beauty
- 3. Charming

LOWER RATED OPPORTUNITIES

1. Fun 2. Place with lots to see/do

3. Place to be refreshed

3. Makes me feel welcome

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

LGBTQ+ TRAVELERS

HISPANIC TRAVELERS

LOWER RATED OPPORTUNITIES

ace

1. Accepting & inclusive

2. Value for the money

3. Easy to get around

LOWER FAMILIARITY = LOWER RATINGS

General Population visitors rate SLO CAL attributes higher than EDI groups

TOP 3 RATED ATTRIBUTES

3. Big-time natural beauty

1. Fun

2. Unique vibe

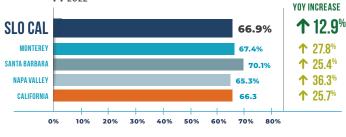
The surfaced roads **TAX REVENUE** đ

OF COUNTYWIDE GDP TOURISM 0 COMPRISES **O**

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HOTEL OCCUPANCY occ

EV 2022

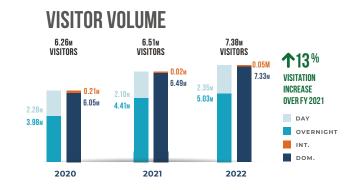


AVERAGE DAILY RATE ADR

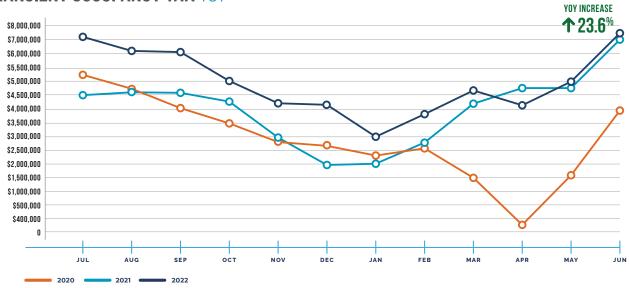


REVENUE PER AVAILABLE ROOM REVPAR

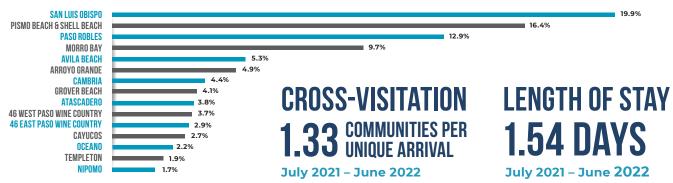




TRANSIENT OCCUPANCY TAX TOT



VISITOR ARRIVALS BY COMMUNITY POINT OF INTEREST e of Tracked Visitor Arrivals | July 2021 – June 202



United States Census Bureau, Tourism Economics Calculations based on percentage, not actual salaries and cost

Source: STR Inc., Tourism Economics, Visit SLO CAL, Arrivalist