

ANNUAL REPORT

FY **2019**
2020



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Visit SLO CAL (VSC) is a team of destination marketing professionals who work with, and on behalf of, our community, our local partners and our investors to promote SLO CAL® (San Luis Obispo County, California) to both domestic and international visitors. As the countywide non-profit 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,

With FY 2019/20 behind us, we'd like to pause and reflect on all that has been accomplished. This past year has had its share of triumphs and challenges, yet in the end we have taken significant strides to set the stage for future success in the years ahead.

With the support of our lodging investors, we successfully campaigned for the renewal of the San Luis Obispo County Tourism Marketing District. Through scores of meetings, the collection of petition signatures and a series of hearings resulting in unanimous approval from all seven city councils and the county board of supervisors, we achieved what seemed improbable five short years ago. The 1.5 percent assessment and ten-year renewal term strengthen our unified district to further increase awareness of SLO CAL® and drive visitor demand just when we need it most.

In advance of the renewal, we hired our first Chief Marketing Officer, Lisa Verbeck, with a goal of elevating our marketing strategy and delivering a more qualified customer to our region. Lisa brings a wealth of experience to our team, partnering with local destinations and our agencies to navigate the current crisis and the road ahead.

The Destination Management Strategy, now known as Experience SLO CAL 2050, was finalized, approved and prioritized by our board of directors for future work. We will continue our work in air service development, partnership with the wine industry and development of the SLO CAL Crafted® brand, while advocating for recommendations such as workforce housing and transportation. Lastly, we will look to fund new initiatives including the development of a countywide events and festivals strategy and a customer service program to help propel our industry forward.

When the outbreak of COVID-19 forced our Travel and Tourism industry to close its doors, Visit SLO CAL pivoted all efforts to focus on supporting and providing additional value for our lodging investors and partners. Like many of you, we reduced our team by 60 percent and the remaining members took temporary 20 percent salary reductions, based on diminished financial resources. We engaged Tourism Economics to develop a countywide, three-scenario, 24-month lodging forecast and worked closely with the San Luis Obispo County Regional Airport on an air service recovery strategy. We launched our data-driven community dashboards providing key data to help drive informed decisions by all of you. To show our commitment to our communities' safety and well-being, we paused all paid advertising and shifted our messaging, focused on keeping SLO CAL top of mind for when the time is right.

With the challenges of rebounding the tourism industry ahead, strategy remains critical to our success. In May, Visit SLO CAL's Board of Directors approved Strategic Direction 2023, the strategic plan that will serve as our new north star. Built upon the accomplishments of Strategic Direction 2020, this plan is the culmination of broad industry collaboration focused on delivering on the needs of our investors and our communities.

While much of the past year has been challenging for all, we are proud of the collective accomplishments of our industry, building a foundation for SLO CAL's future success in 2021, and years to come!

All the best,



Chuck Davison, CDME
President & CEO
Visit SLO CAL



BOARD, COMMITTEES & TEAM

BOARD OF DIRECTORS

CLINT PEARCE

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

MARK EADS

Vice Chair | SeaVenture Beach Hotel | Pismo Beach
Elected Designated At-Large Seat (—June 2023)

HEMANT PATEL

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

AARON GRAVES

Treasurer | The Rigdon House | Unincorporated Area
Elected Designated At-Large Seat (—June 2023)

JAY JAMISON

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

ALMA AYON

Sundance Bed & Breakfast | Paso Robles
Elected Designated Bed & Breakfast Seat (—June 2021)

JEDIDIAH BICKEL

SeaCrest OceanFront Hotel | Pismo Beach
Appointed Pismo Beach Seat (—June 2021)

KATHLEEN BONELLI

Paso Robles Vacation Rentals | Paso Robles
Elected Designated Vacation Rental Seat (—June 2022)

JIM HAMILTON

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

TONI LEGRAS

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

SAM MILLER

Holiday Inn Express | Grover Beach
Appointed Grover Beach Seat (—June 2021)

NIPOOL PATEL

Lamplighter Inn & Suites | San Luis Obispo
Appointed San Luis Obispo Seat (—June 2022)

VICTOR POPP

La Quinta Inn & Suites | Paso Robles
Appointed Paso Robles Seat (—June 2021)

AMAR SOHI

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

Open Seat | Arroyo Grande

Appointed Arroyo Grande Seat (—June 2021)

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

JOCELYN BRENNAN*

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

LORI KELLER

President/Principal | Blu Hotel Management (—June 2021)

JENNIFER LITTLE**

Tourism Manager | City of Morro Bay

JOEL PETERSON

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

LINDSEY ROBERTS

Marketing Manager | Martin Resorts (—June 2021)

JOHN SORGENFREI

President & Owner | TJA Advertising (—June 2022)

ANNE STEINHAEUER†

Executive Director | SLO Coast Wine Collective (—June 2020)

DANNA STROUD**

Executive Director | Travel Paso

JILL TWEEDIE

Founder & President | Breakaway Tours & Event Planning (—June 2022)

*Destination Partner †Resigned June 2020

**Resigned May 2020

TEAM



CHUCK DAVISON
President & CEO



LISA VERBECK
Chief Marketing Officer



DEREK KIRK
*Director of Community
Engagement & Advocacy*



BRENDAN PRINGLE
Director of Operations



MICHAEL WAMBOLT
Director of Travel Trade



KYLA BOAST
Sales Manager



TAYLOR GRANTHAM
PR & Communications Manager



ASHLEY MASTAKO
Partner Engagement Manager



HALEY CAHILL
Marketing Coordinator

ADVISORY COMMITTEE

WADE HORTON
County Administrative Officer | County of San Luis Obispo

LYNN COMPTON
Supervisor, District 4 | County of San Luis Obispo

JIM BERGMAN ^{††}
City Manager | City of Arroyo Grande

LAN GEORGE
Councilmember | City of Arroyo Grande

RACHELLE RICKARD
City Manager | City of Atascadero

HEATHER NEWSOM
Councilmember | City of Atascadero

MATTHEW BRONSON
City Manager | City of Grover Beach

DESI LANCE
Councilmember | City of Grover Beach

SCOTT COLLINS
City Manager | City of Morro Bay

RED DAVIS
Councilmember | City of Morro Bay

TOM FRUTCHEY
City Manager | City of Paso Robles

STEVE MARTIN
Mayor | City of Paso Robles

JIM LEWIS
City Manager | City of Pismo Beach

ERIK HOWELL
Mayor Pro Tem | City of Pismo Beach

DEREK JOHNSON
City Manager | City of San Luis Obispo

HEIDI HARMON
Mayor | City of San Luis Obispo

^{††}Resigned May 2020

TOURISM MARKETING DISTRICT RENEWAL

On January 14, 2020, the San Luis Obispo County Board of Supervisors unanimously approved the proposed Management District Plan set forth by the tourism industry and Visit SLO CAL to renew the Tourism Marketing District (TMD). The original five-year term of the TMD was to expire on June 30, 2020. The approved proposal increases the previous 1.0% assessment to 1.5% on short-term lodging stays throughout San Luis Obispo County and extends the district through June 30, 2030.

PROCESS

As requested by our community's local government stakeholders, VSC contracted with Tourism Economics to perform a return on investment (ROI) study to measure the efficiency and effectiveness of the organization's efforts. The study found that VSC produced an ROI of \$44 for every dollar invested overall and an ROI of \$57 for every dollar invested in new fly market advertising, providing a data-driven basis for the renewal.

INITIAL TERMS

1.0%

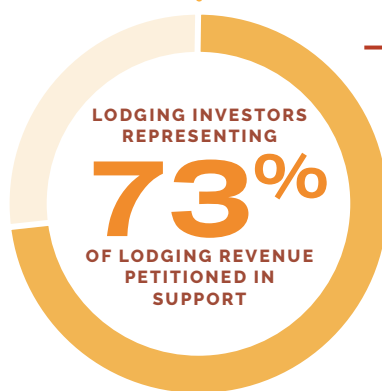
**5 YEAR
TERM**

**\$44:\$1 RETURN ON
INVESTMENT**

RENEWAL TERMS

1.5%

**10 YEAR
TERM**

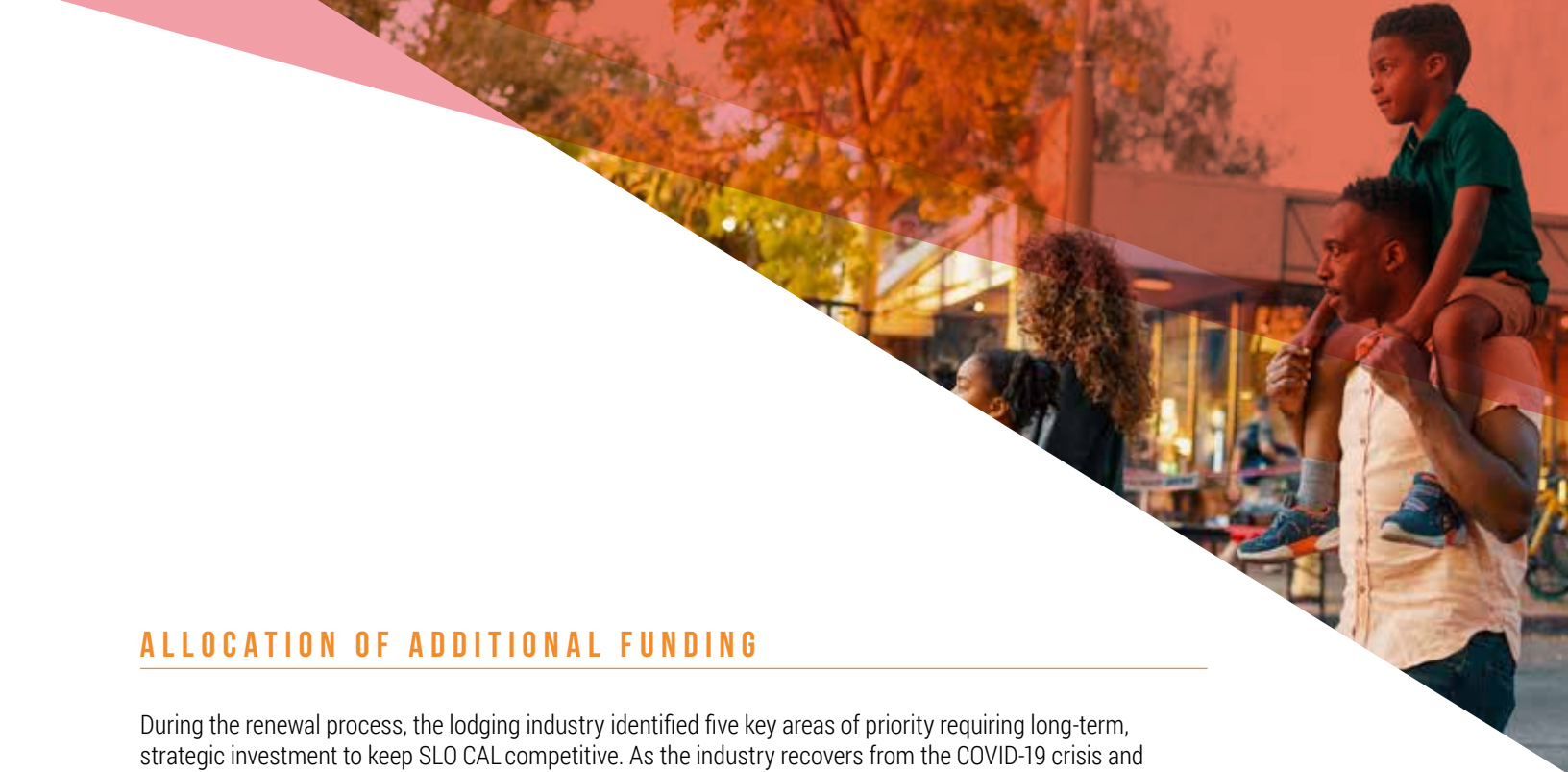


**APPROVED 32:0
BY CITY COUNCILS**

5:0 VOTE OF CONSENT
FROM THE BOARD OF SUPERVISORS

After gaining buy-in on the terms of the renewal and the Management District Plan from key investors, destination partners and the leadership of the county and all seven cities, the Visit SLO CAL team worked alongside investors to collect petitions in support of the renewal.

By the conclusion of this process, lodging investors representing more than 73 percent of countywide lodging revenue petitioned in support of the district, while lodging investors representing only 3 percent of revenue petitioned against it.



ALLOCATION OF ADDITIONAL FUNDING

During the renewal process, the lodging industry identified five key areas of priority requiring long-term, strategic investment to keep SLO CAL competitive. As the industry recovers from the COVID-19 crisis and tourism revenue grows, Visit SLO CAL plans to allocate additional TMD funding to the following key areas to support new inventory in the pipeline.

ADVERTISING & MARKETING

Increase campaign investment in feeder markets to drive demand during need times and extend length of stay through highly-targeted brand marketing and co-ops

SALES SUPPORT Grow Travel Trade initiatives to support sales efforts	INTERNATIONAL MARKETS Invest in top inbound international markets and key new growth markets once long-haul travel begins to rebound	AIR SERVICE DEVELOPMENT Restore and increase flight service with additional flights and new air service markets	EXPERIENCE SLO CAL 2050 Implement VSC-owned, tourism-related recommendations, including a customer service program and events and festivals strategy
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COVID-19 RESPONSE

Throughout the COVID-19 pandemic, the Visit SLO CAL team has been hard at work on behalf of our investors, partners and stakeholders, advocating for critical pieces of legislation, working with local government, building resources around messaging and safety and taking proactive steps to ensure that when we move into the recovery phase, our county will be well-positioned for success.

PROACTIVE EFFORTS

From the beginning of the crisis, the Visit SLO CAL team took proactive steps to reduce the remainder of the organization's fiscal year budget by 72 percent, including the elimination of five full-time and three part-time positions and a temporary 20 percent salary reduction for remaining team members. VSC also developed conservative cash flow projections to ensure that the organization is able to launch effective marketing campaigns that will propel our county into recovery when the pandemic subsides.

The team hosted "Virtual Cheers" programs with journalists and tour operators to keep SLO CAL top of mind as visitors gradually become more comfortable with the idea of travel. Additionally, as a way to connect with partners, visitors and locals, VSC launched a SLO CAL Crafted Live series showcasing local artisan producers such as Leo Leo Gelato, Central Coast Distillery and Stepladder Ranch & Creamery.

As an added benefit to our investors and partners, Visit SLO CAL conducted a 24-month economic forecast that included specific forecasts for municipalities, along with a countywide forecast. VSC also began providing monthly economic data dashboards to enable industry professionals to project future business and make informed operating decisions.

RESOURCES

In early April, the VSC team transitioned the weekly This Week in SLO CAL emails to bi-weekly Today in SLO CAL emails due to the ever-changing nature of the pandemic and government orders. The open rate of these emails was twice the rate of traditional communications and directed recipients to VSC's COVID-19 industry-focused landing page. In addition, Visit SLO CAL worked with local destination partners to create Open & Safe signage and social media assets for the local industry to use when communicating to guests.



ADVOCACY

In late March, Visit SLO CAL leadership joined a number of working groups and coalitions to advocate on behalf of our lodging investors and the broader Travel & Tourism industry.

COUNTY OF SAN LUIS OBISPO START GUIDE DEVELOPMENT TEAM

- To ensure the lodging investors, restaurants, event and activity partners were able to inform the county's re-opening plan.

CALTRAVEL COVID-19 TASK FORCE

- To ensure our voice is being heard at the state level through the Governor's Office of Business & Economic Development.

COUNTY OF SAN LUIS OBISPO EMERGENCY JOINT INFORMATION CENTER

- To ensure the industry receives the information and resources needed by directing tourism industry businesses to VSC's COVID-19 landing page.

U.S. TRAVEL-LED COALITIONS

- To support the Paycheck Protection Program and business protection efforts.

SLO CAL LODGING OWNERS ROUNDTABLE

with Assemblyman Jordan Cunningham

- To discuss the state response to the COVID-19 crisis.

SLO CAL LODGING OWNERS ROUNDTABLE

with Emergency Services Director and County Administrative Officer, Wade Horton

- To negotiate the lodging occupancy cap and other potential restrictions.

VSC continues to work with local leaders including San Luis Obispo County Administrative Officer, Wade Horton; Lead Public Information Officer, Whitney Szentesi; Public Health Director, Dr. Penny Borenstein and others to ensure that the local tourism industry has a strong voice.



STRATEGIC DIRECTION 2023

In the spring, 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 next three years. Following the success of Strategic Direction 2020, SD 2023 was advised by 170 survey responses, one 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 life-long 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 roadmap 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



IMPERATIVES

Enhance Our Organizational Capacity and Culture

INITIATIVES

- Assess and refine interdepartmental communication and processes
- Develop and enable our team
- Foster an engaged and focused team culture

OBJECTIVES

- Increase mean Employee Engagement score to 3.85
- Return ratio of administrative cost to economic impact to 2019 level or higher
- Increase Team Net Promoter score to 11 or higher, and maintain
- Increase Whole Systems mean score on Systems and Processes and Capabilities and Talent sections to 3.25

Amplify and Steward the SLO CAL Brand Through Unified Efforts

INITIATIVES

- Execute a “house of brands” strategy that honors the experiences of our individual destinations
- Increase share of voice and intent to travel through targeted media strategies
- Target and nurture marketing partnerships that increase our brand awareness

OBJECTIVES

- Increase SLO CAL brand awareness year-over-year, as measured by advertising effectiveness and ROI (Return on Investment) study
- Increase length of stay by .2 days over 2019, as measured by Arrivalist
- Increase cross-visitation to 2 communities per unique arrival, as measured by Arrivalist
- Achieve mean MPV (Marketing Partnership Value) score of 4

Lead the County Tourism Industry in a Collaborative Resilience Planning Effort

INITIATIVES

- Define and activate pathways to accelerate recovery for our tourism industry
- Develop mechanisms to quickly gather, report and leverage crisis-related data
- Foster long-term resilience for our tourism industry

OBJECTIVES

- Restore annual visitor volume with growth 10% or more above statewide growth, per Visit California numbers
- Restore total air service to 80% of 2019 baseline or higher
- Outperform California tourism recovery by 5%, per Dean Runyan Economic Impact Report

Demonstrate Value to Investors, Partners, Stakeholders and Communities

INITIATIVES

- Build local awareness of Visit SLO CAL and its positive impacts
- Increase opportunities for engagement with our investors, partners and stakeholders
- Innovate in development of data resources for our tourism community
- Advance advocacy efforts to promote the value of tourism

OBJECTIVES

- Foster balanced year-over-year growth of engagement in Visit SLO CAL opportunities
- Increase investor/partner/stakeholder Net Promoter Score by 5% year-over-year
- Secure at least 2 local media articles annually that receive a perfect score of 10 using the Barcelona Principles scoring rubric
- Maintain community acceptance of tourism survey score at or above 2018 baseline

2019 TOURISM BENEFIT



VISITOR spending

\$1.94B

83%
of travel businesses
are considered
small businesses

1 OUT OF 6
SLO CAL JOBS
depend on
TRAVEL & TOURISM

INDUSTRY earnings

\$816M



TOURISM PUTS

22,857 **7.1%**
YOY INCREASE

RESIDENTS TO WORK EACH DAY



TOURISM CONTRIBUTED

\$43.7M **6.5%**
YOY INCREASE

IN TRANSIENT OCCUPANCY TAX REVENUE

WITHOUT TOURISTS
EACH SLO CAL HOUSEHOLD
WOULD NEED TO SPEND \$18,843
TO CREATE THE SAME ECONOMIC BENEFIT
for the community

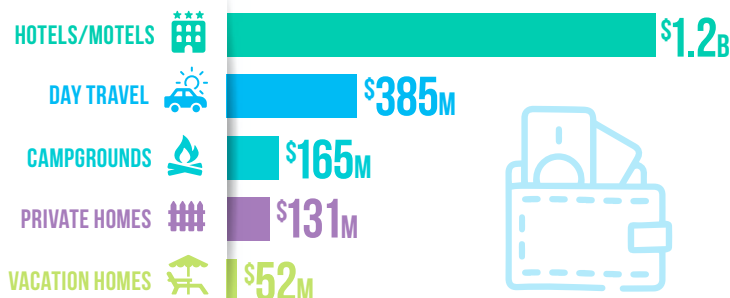
WITHOUT STATE & LOCAL TAX REVENUE
GENERATED BY TRAVEL & TOURISM
EACH SLO CAL HOUSEHOLD WOULD
PAY AN ADDITIONAL

\$1,690 *in taxes*

DIRECT SPENDING BY SECTOR



DIRECT SPENDING BY ACCOMMODATION TYPE



TRAVEL SPENDING GENERATED

\$90M

IN DIRECT COMMUNITY INVESTMENT

which could cover the expenses for

887 POLICE OFFICERS' SALARIES

OR

1,103 FIREFIGHTERS' SALARIES

OR

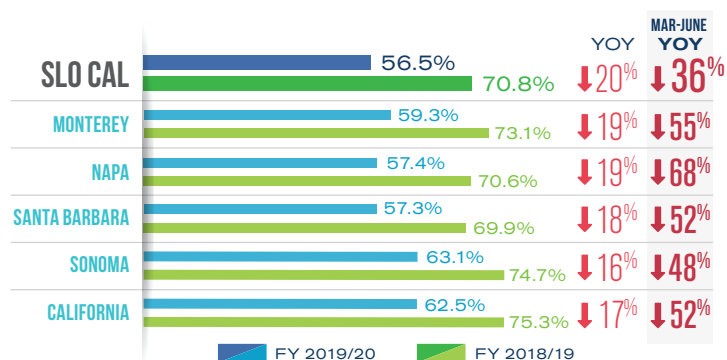
1,931 TEACHERS' SALARIES

OR

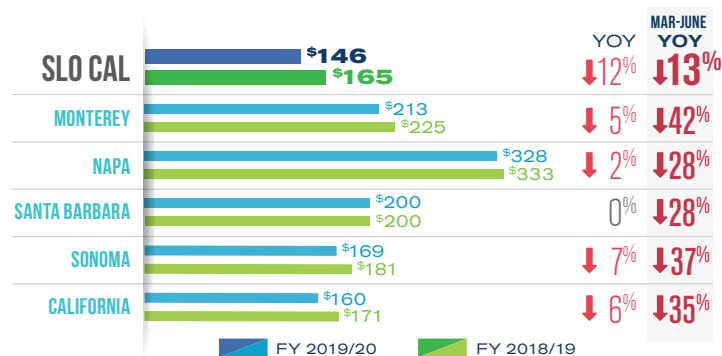
144 MILES OF 2-LANE RESURFACED ROADS

TOURISM COMPRISES 9.7% OF COUNTYWIDE GDP

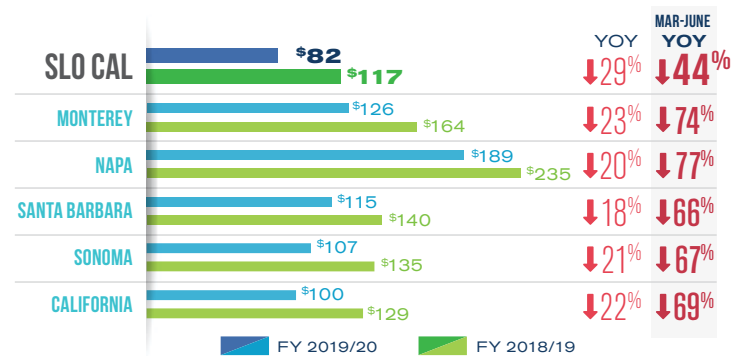
HOTEL OCCUPANCY (OCC)



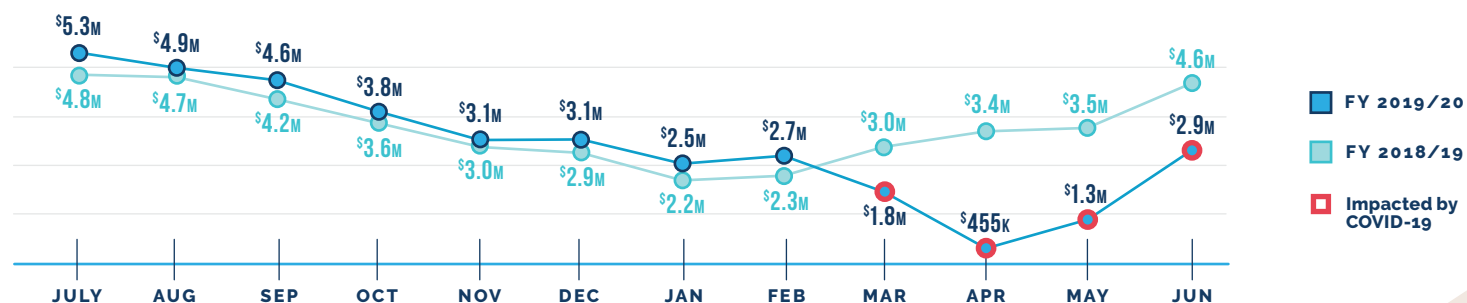
AVERAGE DAILY RATE (ADR)



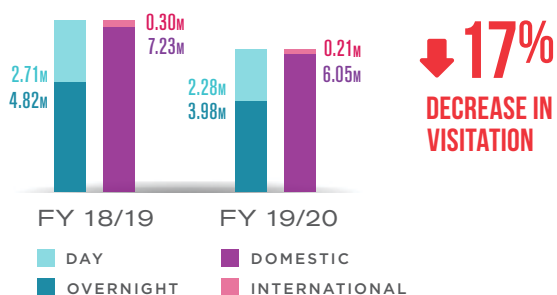
REVENUE PER AVAILABLE ROOM (REVPAR)



TRANSIENT OCCUPANCY TAX (TOT)



VISITOR VOLUME



TRAVEL TRADE

Visit SLO CAL's Travel Trade department utilizes international representation, sales missions, familiarization tours (FAMs) and trade shows to expand reach and promote SLO CAL as a multi-night destination. In March, due to the COVID-19 crisis, international representation and meeting and conference activation was suspended indefinitely and traditional trade programs were postponed until travel resumes. However, VSC continues to build and nurture relationships with tour companies, meeting planners and others in the sales funnel to ensure SLO CAL is top of mind as the industry recovers.

2019
2020
2021

OCTOBER

Visit California SuperFAM (Germany/France)

California RV Show (RVIA)

Vacation Rental Management Association (VRMA) Conference

NOVEMBER

World Travel Market & German Sales Days

HelmsBriscoe Meeting Planner FAM

DECEMBER

National Travel Association Travel Exchange

CalSAE Seasonal Spectacular

JANUARY

Tour & Travel Winter Sales Mission

APRIL

Smart Meetings Virtual Trade Show

MAY

Meeting & Conference Virtual Cheers Program

24 
FAM ATTENDEES

123
APPOINTMENTS

5 TRADE
SHOWS

298
LEADS

1 SALES
MISSION

INDUSTRY TERMS

Familiarization (FAM) Tour: A hosted tour of SLO CAL for Travel Trade or media representatives to experience and learn about the destination firsthand

Sales Mission: A series of sales meetings in one of VSC's target markets with travel agencies, tour operators and/or meeting planners to pitch and educate them on the destination and its offerings

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

In FY 2019/20 Visit SLO CAL worked hand in hand with Visit California, local destination marketing organizations and local business partners to engage with members of the press through in-market meetings, press events, proactive pitching and FAM tours. VSC partnered with TURNER PR domestically and Black Diamond in the UK and Ireland to increase SLO CAL's share of voice, generating almost \$1.6 million in earned media value. From March onward, earned media efforts pivoted to domestic and reactive pitching only due to the COVID-19 crisis. During that time, VSC was able to leverage virtual and future-focused story angles to secure earned media articles.

DOMESTIC



163 ARTICLES
\$1.2M AD VALUE EQUIVALENCY
330M IMPRESSIONS

INTERNATIONAL



58 ARTICLES
\$307k AD VALUE EQUIVALENCY
26M IMPRESSIONS

LOCAL



40 ARTICLES
\$14k AD VALUE EQUIVALENCY
8M IMPRESSIONS

TOTAL

261 ARTICLES
\$1.6M AD VALUE EQUIVALENCY
364M IMPRESSIONS

NOTABLE ARTICLES

THE INDEPENDENT (UK)

"San Luis Obispo City Guide: Where to Eat, Drink, Shop and Stay on California's Central Coast"



INDEPENDENT

THE SCOTTISH SUN (UK)

"Slow Down in SLO CAL" (print)



LONELY PLANET (US)

"Adventures in California's San Luis Obispo County"



OUTSIDE (US)

"6 Under-the-Radar Beach Towns that Aren't Touristy"



TRIPSAVVY (US)

"The Best Time to Visit California's Central Coast"



LIVABILITY (US)

"Go There: A Relaxing Weekend in San Luis Obispo, California"



San Diego Flight Launch Familiarization Tour

In an effort to support the San Diego flight launch, Visit SLO CAL partnered with Travel Paso and San Simeon Tourism Alliance to host a familiarization tour for six qualified San Diego journalists.



OWNED MEDIA



In FY 2019/20, Visit SLO CAL focused on inspiring, educating and engaging travelers to visit SLO CAL. Through a dynamic content strategy, VSC delivered timely messaging on SLOCAL.com and distributed that messaging across all owned channels for a stronger ROI. As the COVID-19 pandemic began to disrupt the industry in March, VSC shifted its messaging to keep the destination top-of-mind, encouraging them to dream of future leisure travel to SLO CAL.

FY 2019/20 SLOCAL.COM SNAPSHOT



881k ^{13% ↑}
SESSIONS

50.46% ^{15% ↑}
BOUNCE RATE

120k ^{9% ↓}
ENGAGED SESSIONS

32k ^{24% ↑}
PARTNER REFERRALS

^{17% ↑}
36k
QUALIFIED SESSIONS

SOCIAL



FOLLOWING ^{25% ↑}

FY	FOLLOWING
FY 18/19	93,869
FY 19/20	117,124

CLICKS ^{35% ↓}

FY	CLICKS
FY 18/19	24,045
FY 19/20	15,532

INDUSTRY TERMS

Sessions: A group of user interactions with a website that takes place within a given time frame

Bounce Rate: The percentage of sessions to the website that navigate away from the site after the user views only one page

Engaged Session: A website session (on SLOCAL.com) that has met the following criteria: Session duration is greater than 90 seconds and user has done at least one of the following: 1) visited two or more pages during the session, 2) subscribed to the eNewsletter, 3) requested a Visitor Magazine, 4) clicked "Visit Website" or "Book Now" or 5) clicked on the phone number on a partner listing

Qualified Session: A website session (on SLOCAL.com) that has met the following criteria: User subscribed to the eNewsletter or requested a Visitor Magazine or clicked "Visit Website" or "Book Now" or clicked on the phone number on a partner listing

Partner Referral: A click on a partner link, or the "Visit Website," "Book Now," or phone number on the partner listing

PAID MEDIA

Visit SLO CAL worked closely with Miles Partnership to guide and execute the VSC paid advertising strategy. Using data-driven optimizations, the campaign was delivered to three target personas across seven media markets, including Las Vegas and San Diego, which introduced new direct flight service. According to Arrivalist, FY 2019/20 paid media resulted in a 74.3 percent lift in arrivals and a 15 percent lift in length of stay compared to the control group that was not exposed to the campaign.

In March, VSC immediately paused all paid media, adapting quickly to the changing travel environment in light of the pandemic.

FY 2019/20 PAID MEDIA SNAPSHOT

\$990.7k
SPEND

444.3k
CLICKS

98.3M
IMPRESSIONS

97% **5%** ↑
CONNECTED TV VIDEO
COMPLETION RATE

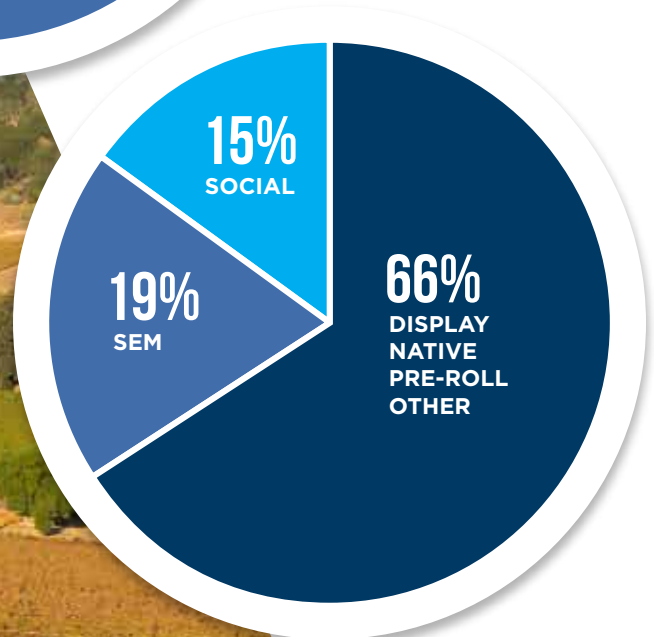
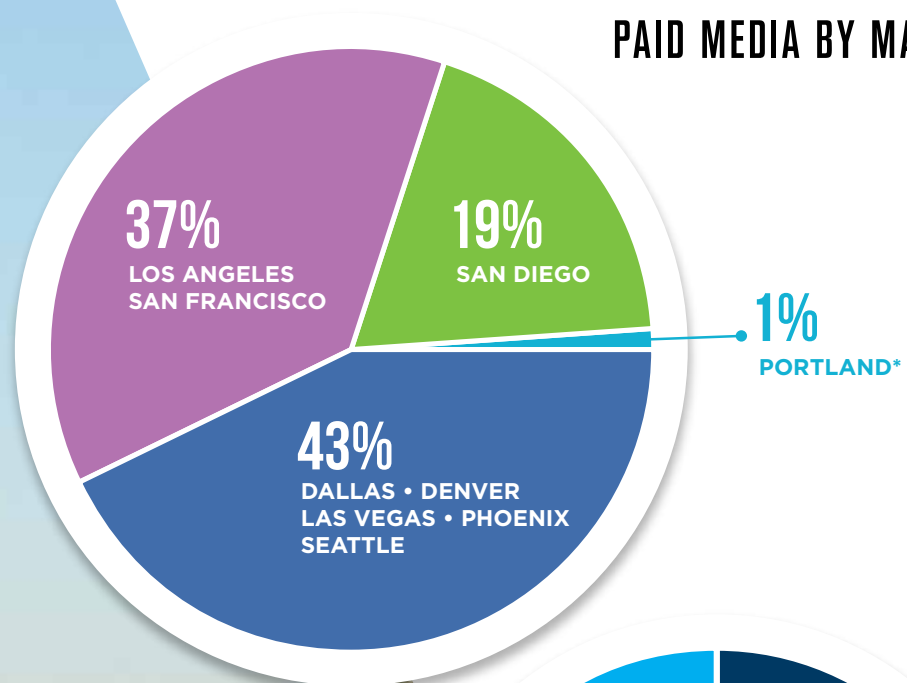
\$1.06
OVERALL COST PER
LANDING PAGE ON SOCIAL
3% ↓

3.89%
SEM CLICK-THROUGH RATE
15% ↑

\$2.03
SEM COST PER CLICK
2% ↓



PAID MEDIA BY MARKET



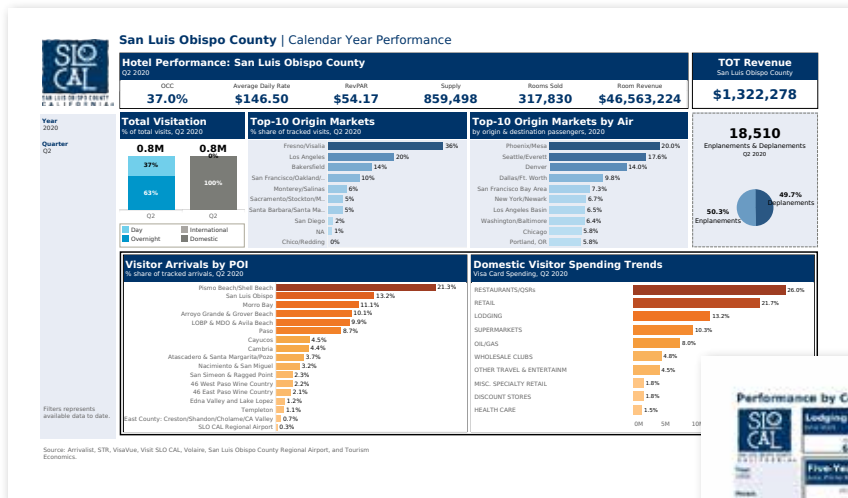
BREAKDOWN BY CHANNEL

**Shortly after launching, the Portland campaign was paused due to the COVID-19 pandemic.*

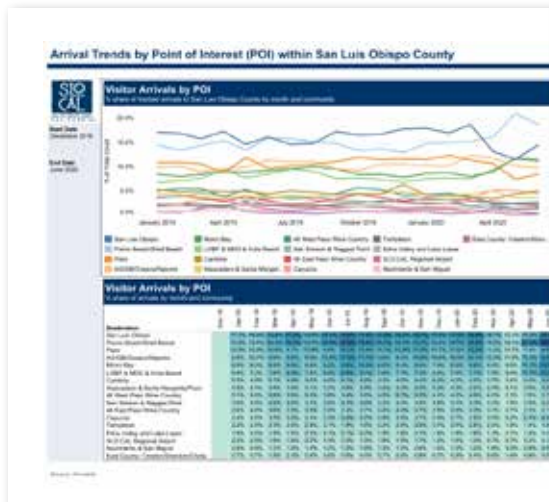
TOURISM DATA & RESEARCH

In recent years, Visit SLO CAL has invested in key data points for its investors, partners and stakeholders, sharing data from STR, VisaVue Travel and Tourism Economics, as well as sharing countywide TOT information. In FY 2019/20, Visit SLO CAL partnered with Tourism Economics to aggregate all of that data into Tableau dashboards, providing easy-to-understand visualizations and comparisons, and summarizing the key insights from the collective data in shareable reports.

As previously noted, upon the request of our local government stakeholders leading into the renewal process, VSC invested in a return on investment (ROI) study to demonstrate the efficiency and effectiveness of the organization. The study found that VSC influenced \$44 in visitor spending for every dollar invested.



DATA AND INSIGHTS DASHBOARD



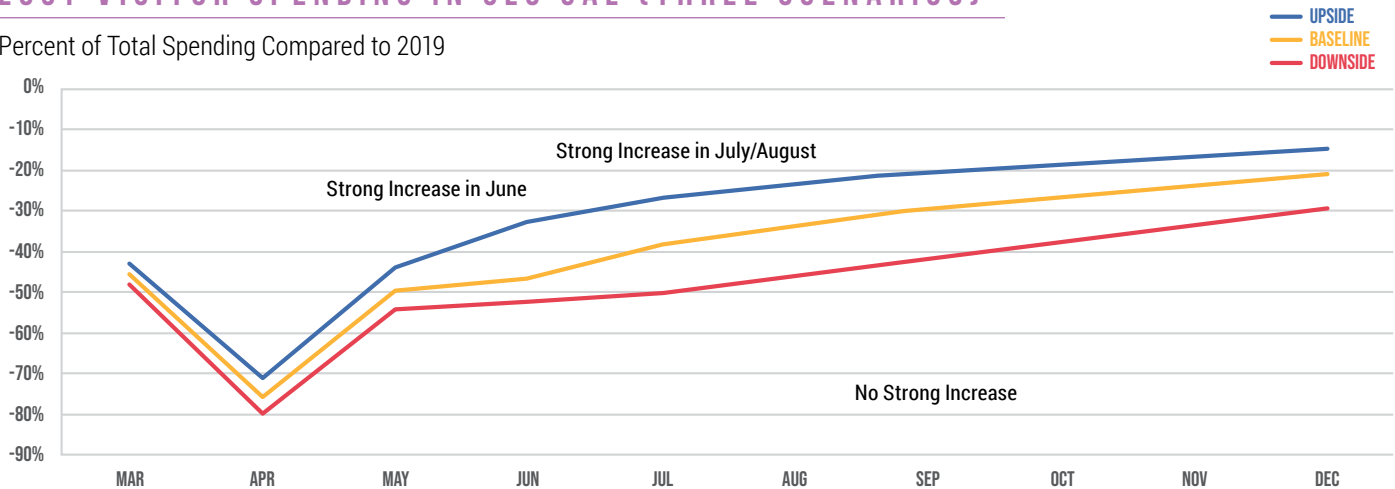
24-MONTH LODGING FORECAST



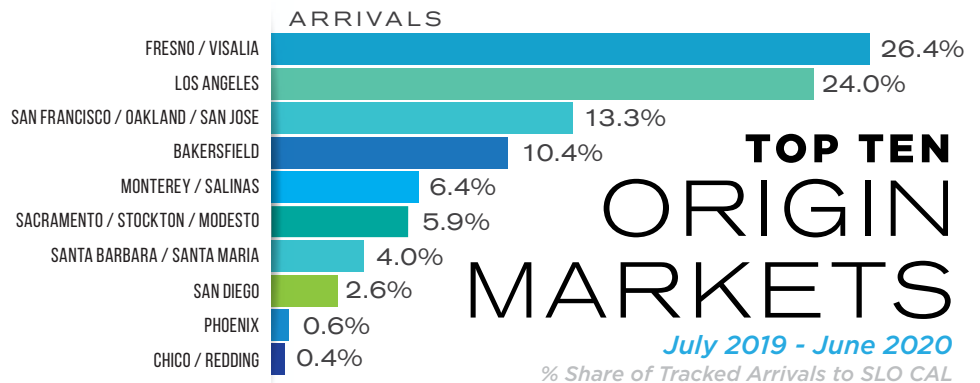
With the uncertainty surrounding the COVID-19 pandemic, VSC commissioned Tourism Economics to produce a lodging forecast that provides month-by-month projections through June 2022, broken down by Occupancy, ADR (average daily rate), RevPAR (revenue per available room) and lodging taxes. In addition to the overall countywide report, VSC commissioned individual forecast projections for communities that report into STR, including Atascadero, Cambria, Morro Bay, Paso Robles, Pismo Beach and San Luis Obispo, as part of a co-op with these communities.

LOST VISITOR SPENDING IN SLO CAL (THREE SCENARIOS)

Percent of Total Spending Compared to 2019



Visit SLO CAL measures tracked arrivals through the Arrivalist A2 Attribution and A3 Visitation platforms. Arrivalist A3 offers insights on arrivals into San Luis Obispo County and key points of interest (POIs), arrival windows, arrival origins, cross-visitation, length of stay and campaign lift as a result of our paid media and organic traffic.



CROSS-VISITATION HEAT MAP

July 2019 - June 2020

Average of 1.8 Communities Per Unique Arrival



BRAND ACTIVATIONS & CO-OPS

Visit SLO CAL engaged in several events and activations throughout FY 2019/20, including a Google My Business co-op in September and SAVOR - A San Luis Obispo County Experience activation in November. VSC and Surfers of Tomorrow partnered to rebrand the Pismo Beach Open to the SLO CAL Open at Pismo Beach (January 30-February 2) and brought a brand-new surf competition to Morro Bay, the SLO CAL Open at Morro Bay (February 27-March 1). Additionally, VSC worked to bring the world-renowned Spartan Race to SLO CAL in March, but the race was postponed due to the COVID-19 pandemic. VSC leveraged those partnerships to engage new domestic and international consumers who align with VSC target personas, expanding the awareness and reach of the SLO CAL brand in ways that Visit SLO CAL could not achieve alone.

GOOGLE MY BUSINESS CO-OP

In September 2019, Visit SLO CAL collaborated with Miles Partnership on a Google My Business co-op aimed at improving the quality and visibility of destination-related content within Google.



4 REGIONAL WORKSHOPS
ON BEST PRACTICES

7-DAY **146**
PHOTO SHOOT COVERING LOCATIONS

 **4.2k** GOOGLE MY BUSINESS LISTINGS AUDITED
for tourism businesses throughout the county

1k PIECES OF MISSING INFORMATION ADDED
covering almost 800 businesses 

 **3.1k** IMAGES UPLOADED TO GOOGLE

8.1m TOTAL IMAGE VIEWS 

SAVOR



**SAN DIEGO BAY
WINE + FOOD FESTIVAL**



 **11** PARTNERS **11k** REACH

SLO CAL OPEN



136 PRESS MENTIONS
24M REACH

340k VIDEO VIEWS
ACROSS YOUTUBE,
WSL PLAYER AND
SOCIAL MEDIA



FILM SLO CAL

The film industry drives business to SLO CAL with productions investing dollars locally and products showcasing the landscapes, lifestyles and experiences of SLO CAL. Film SLO CAL, a division of Visit SLO CAL, and the film commission for San Luis Obispo County, promotes, facilitates and tracks filming throughout the county, working to increase the number of productions and resulting economic impact.



62 PRODUCTIONS



85 FILMING DAYS



65 LEADS



\$1.4M ESTIMATED SPEND IN SLO CAL

ADVOCACY

The Visit SLO CAL Board of Directors is deeply invested in industry advocacy and as such, adopted a formal Public Policy Platform and advocacy strategy in 2019. VSC's advocacy efforts are focused on ease of travel and ensuring a strong Travel and Tourism industry. VSC partners with elected officials and their staff at all levels and is actively involved with CalTravel and U.S. Travel Association.

Industry Advisory Group

The VSC team regularly hosted Industry Advisory Group meetings with Congressman Salud Carbajal and Assemblyman Jordan Cunningham, along with a group of lodging property owners from across the county to ensure elected officials know the ways in which they can support our county's second largest industry.



SLO CAL representatives meet with Assemblyman Jordan Cunningham during CalTravel Tourism Advocacy Day

Partnership with CalTravel

VSC actively partners with CalTravel on statewide advocacy efforts. In FY 2019/20, Chuck Davison, VSC President & CEO, served as the Treasurer on the CalTravel Executive Committee and Derek Kirk, VSC Director of Community Engagement & Advocacy, served on the Government Relations Committee. Additionally, the team played an active role in the appointment of Toni LeGras to the CalTravel Board, making her the first vacation rental representative in the state to hold that position.



Individual Meetings with Elected Officials

The VSC team works throughout the year to engage elected officials on the issues impacting our industry. Last year in particular, the VSC team met with each of the members of the board of supervisors and over 18 city council members regarding the renewal of the TMD. In addition, Chuck Davison, VSC President & CEO, met with Congressman Salud Carbajal in his D.C. office to discuss federal policy issues.



Chuck Davison with Representative Salud Carbajal

COMMUNITY & PARTNER ENGAGEMENT

In FY 2019/20, Visit SLO CAL engaged investors, partners and stakeholders through promotion, education and collaboration, using the SLO CAL Connection and e-blasts to share the most recent tourism research, media and sales leads, and other valuable opportunities.

TOURISM ECOSYSTEM

As Destination Marketing and Management Organizations, it is imperative that all parts of the funnel lift each other up for the success of our communities and tourism businesses. To that end, Visit SLO CAL partners with organizations in all parts of the tourism ecosystem, with the intention of driving greater awareness of SLO CAL as a destination and benefiting our industry partners.



VIRTUAL TOWN HALL

In June, Visit SLO CAL hosted its first ever Virtual Town Hall as a way to connect with investors, stakeholders and partners during the pandemic in order to provide an update on the current state of tourism in SLO CAL as well as a look at future marketing and advocacy efforts.



Special Guest Presentation by **expedia group**
media solutions

INDUSTRY EDUCATIONAL SYMPOSIUM

As a way to provide our partners with the most up-to-date information on research and trends, Visit SLO CAL hosted a half-day Industry Educational Symposium in October, bringing some of tourism's top leaders to discuss topics that are important to the industry.



*Ryan Becker, VP of
Communications,
Visit California*

DESTINATION POSTCARDS

As part of a pilot program in early 2020, VSC worked closely with industry partners across SLO CAL to create a number of consumer postcards representing communities throughout the county, giving lodging investors the opportunity to provide the postcards to their guests at no charge.



EXPERIENCE SLO CAL 2050



After 18 months of development, the Visit SLO CAL Board of Directors adopted the final Destination Management Strategy, approved a Work Plan including implementation steps, branded the document as Experience SLO CAL 2050 and formally prioritized and budgeted for the work to begin in FY 2020/21. The strategy is a 30-year plan for the destination to 1) enhance resident quality of life and 2) create a better visitor experience.

ITEMS IN VISIT SLO CAL'S EXISTING SCOPE

- Air Service & Airport Development
- International Visitors
- Paso Robles & SLO Coast Wine
- SLO CAL Crafted

ITEMS VISIT SLO CAL WILL ADVOCATE FOR/PARTNER ON

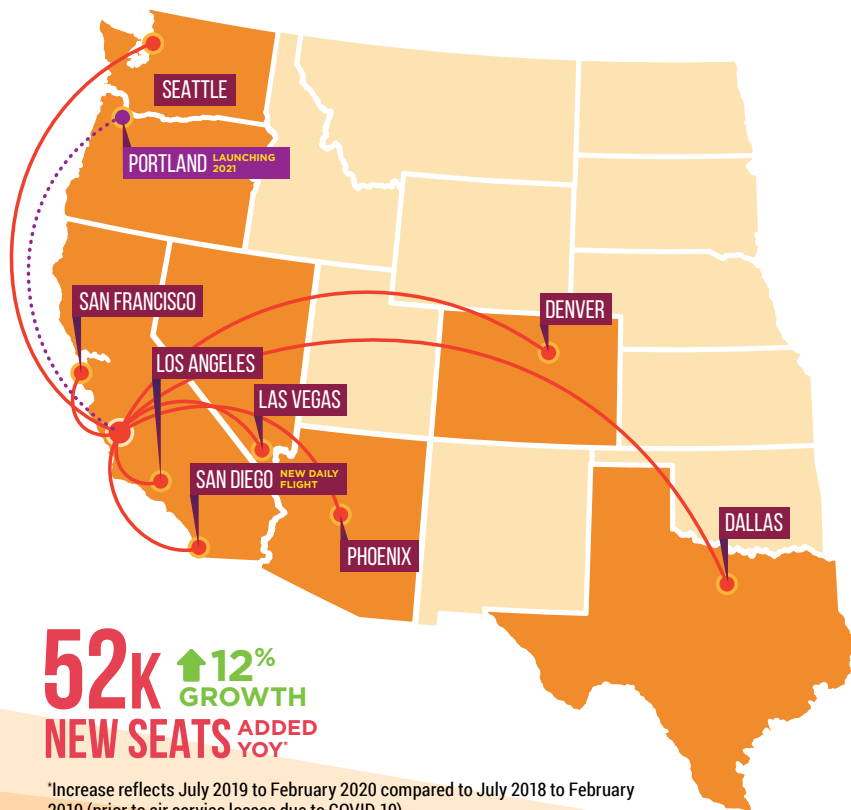
- Authentic Communities (FY 2020/21)
- Countywide Trail System (FY 2020/21)
- Develop & Grow Communities
- Ground Transportation
- Morro Bay Waterfront
- Nightlife, Music & Entertainment (FY 2020/21)
- San Luis Obispo County Conference Center(s)
- Talent Attraction, Development & Careers
- Tourism Management
- Workforce Housing & Transportation (FY 2020/21)
- Cannabis Tourism

ITEMS VISIT SLO CAL WILL FUND/COMPLETE

- Bike Tourism
- Chief Investment Officer
- Culinary Arts Campus
- Customer Service Training Program (FY 2020/21)
- Events & Festivals Strategy (FY 2020/21)
- Experience Incubator
- SAVOR SLO CAL
- Signature Events
- Space Launch Events (FY 2020/21)
- Sustainable Tourism
- Thematic Routes (FY 2020/21)

AIR SERVICE DEVELOPMENT

Visit SLO CAL worked closely with SLO County Regional Airport on air service development, attracting new flight service from Las Vegas, San Diego and Portland through multiple airline headquarters meetings, air service conferences and marketing investment in flight markets.



*Increase reflects July 2019 to February 2020 compared to July 2018 to February 2019 (prior to air service losses due to COVID-19)

Source: Volaire

MOVING FORWARD

A PHASED APPROACH

The return to leisure travel will not occur overnight, so Visit SLO CAL will take a phased approach in advertising and sales efforts, monitoring various macro and micro signals in order to determine when it is appropriate to transition into the next wave of recovery.

With a campaign investment similar to last year's, we will prioritize targeting high-value travelers, as they are more likely to resume travel sooner, stay longer and spend more money while in SLO CAL. The creative will reflect a house of brands approach to ensure that we honor the experiences of our individual destinations while amplifying the Visit SLO CAL brand. Co-op campaigns with Visit

California, the SLO County Regional Airport and destination partners will ensure media spend is leveraged to obtain strong value for money, as well as high reach and frequency.

From a communications standpoint, VSC will lean in to the road trip and California Less Traveled messaging in order to grow SLO CAL's share of voice among regional and national media, and stand out from competitors.



A SHIFTING SALES STRATEGY

With the COVID-19 pandemic disrupting the sales funnel, VSC will be shifting its short-term strategy to a more in-state, drive market approach, while assuring the region remains top-of-mind with both the meeting and conference and international trade segments. We will reactivate large-scale programs for international Tour and Travel and Meeting and Conference sales when the time is right.

EXPERIENCE SLO CAL 2050

While some of the 28 recommendations coming out of Experience SLO CAL 2050 focus on VSC's existing scope of work and advocacy efforts, VSC will also be funding new initiatives, including the development of a countywide events and festivals strategy and a customer service program to help drive the growth of the tourism industry, as prioritized by the VSC Board of Directors.



For more details on VSC's FY 2020/21 scope of work, be sure to download the FY 2020/21 Business & Marketing Plan, available here: <http://bit.ly/vsc-plan>.

FY 2020/21 BUDGET

ESTIMATED COST OF PROVIDING
ACTIVITIES IN THE NEXT FISCAL YEAR

\$4,649,473

ESTIMATED CONTRIBUTION FROM
NON-ASSESSMENT SOURCES

\$69,226

ESTIMATED FY 2019/20 DEFICIT
CARRIED FORWARD TO FY 2020/21

\$269,249



*Contingency funds reflect 5% of TMD revenue.

APPENDIX

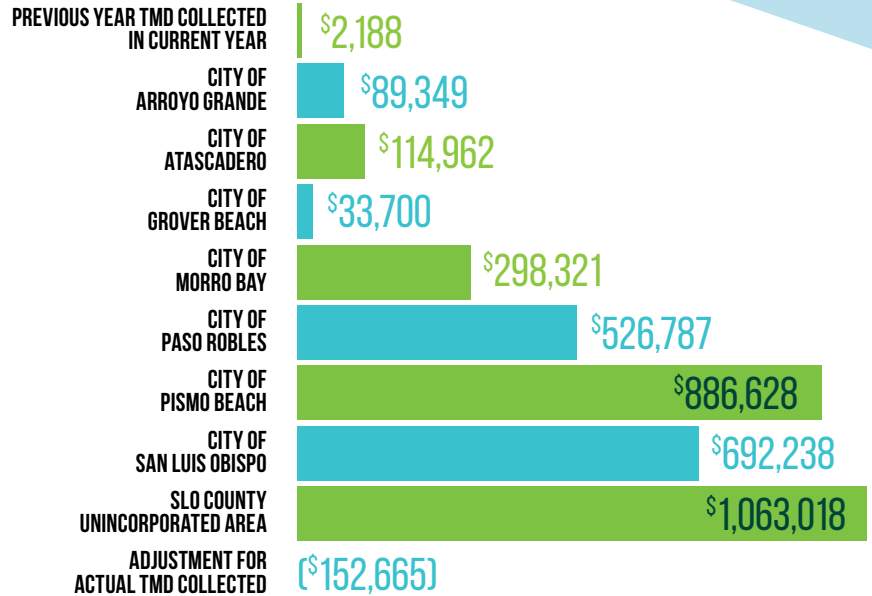
METHOD & BASIS OF LEVYING ASSESSMENT

The annual assessment rate is 1% of gross short-term (stays 30 or fewer consecutive days) room rental revenue. With the passage of the Tourism Marketing District (TMD) on June 10, 2015, implementation of the assessment began July 1, 2015, and continued for five years through June 30, 2020. With the renewal of the TMD by the Board of Supervisors on January 14, 2020, the annual assessment rate increased to 1.5% beginning July 1, 2020 and will continue for ten years through June 30, 2030. 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 TMD managed by Visit SLO CAL.

PROPOSED BOUNDARY, ZONE OR CLASSIFICATION CHANGES

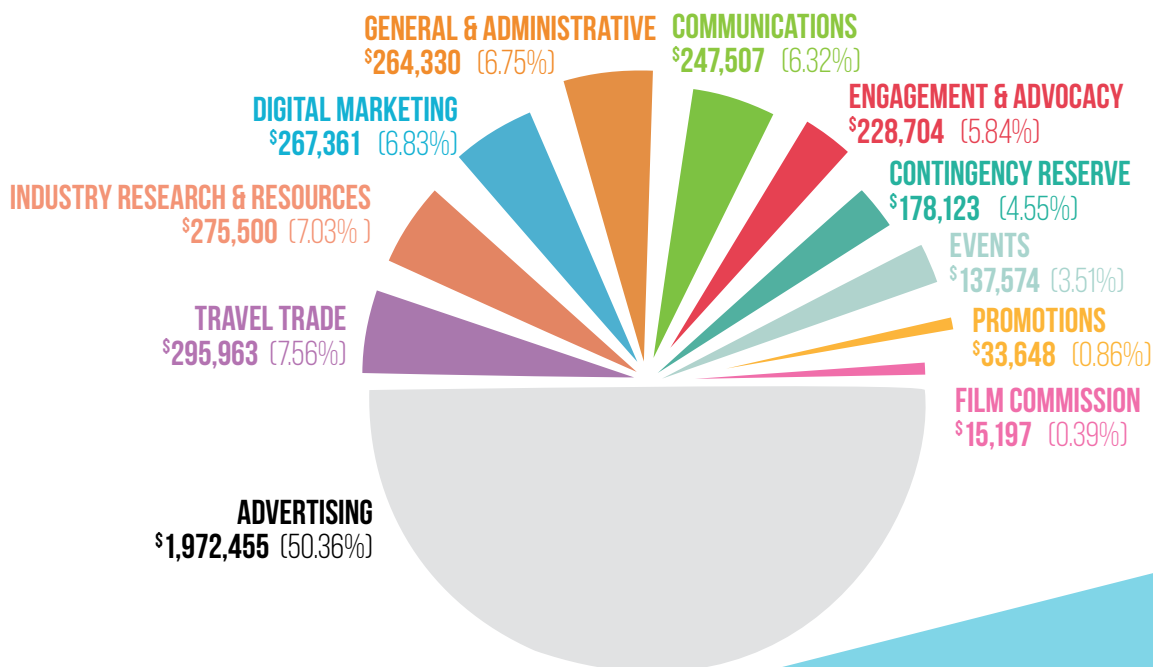
There are no proposed boundary, zone or classification changes for the coming year.

ASSESSED FUNDS FROM FY 2019/20*



*Collections remitted from July 1, 2019 to June 30, 2020, including adjustments made for current year remittances that varied from accrued amounts.

FY 2019/20 DETAILED EXPENDITURES





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