



BRAND ADVERTISING

\$1.8M SPEND
1.1M CLICKS
131k IMPRESSIONS

BREAKDOWN BY CHANNEL
16% Social | 16% SEM | 68% Display/Other

BREAKDOWN BY MARKET
44% Los Angeles | 18% San Francisco | 11% San Diego
6% Dallas, Denver, Las Vegas, Phoenix, Portland, Seattle | 21% California In-State (Other)

1.3M SESSIONS
↑ 33% OVER FY 2019
166k ENGAGED SESSIONS*
56.24% BOUNCE RATE*
*Data not available for FY 2019
87k QUALIFIED SESSIONS
↑ 158% OVER FY 2019

SOCIAL

FOLLOWING 34% ↑
FY 2021 125,567
FY 2019 93,869

CLICKS 12% ↑
FY 2021 309,902
FY 2019 277,019

134k PARTNER REFERRALS
↑ 158% OVER FY 2019
1.4k E-NEWSLETTER SUBSCRIPTIONS
↑ 6% OVER FY 2019
18.64% E-NEWSLETTER OPEN RATE
↑ 42% OVER FY 2019
4.2k VISITOR MAGAZINE REQUESTS
↑ 19% OVER FY 2019

PARTNER ENGAGEMENT

HIGHWAY 1 CLOSURE

- Distributed laminated navigational one-sheets to lodging investors, chambers and visitor centers
- Added multilingual services to SLOCAL.com



GOOGLE MY BUSINESS

5-DAY PHOTO SHOOT
44 LOCATIONS
8 COMMUNITIES

PUBLIC RELATIONS

156 ARTICLES
1.4B IMPRESSIONS
\$5.6M AD VALUE EQUIVALENCY



SALES **6** VIRTUAL TRADE SHOWS
29 APPOINTMENTS
396 BUYERS TRAINED
191 LEADS
11 DIRECT ROOM NIGHT CONTRACTS



24 PRODUCTIONS
47 FILMING DAYS
61 LEADS

\$589k ESTIMATED SPEND IN SLO CAL ECONOMIC IMPACT

EXPERIENCE SLO CAL 2050

As Visit SLO CAL (VSC) addressed immediate concerns and needs affecting the county's Travel & Tourism industry during the COVID-19 pandemic, the momentum of the Experience SLO CAL 2050 recommendations slowed in FY 2021. In December, VSC hired a project manager to facilitate this scope of work and resume progress on the recommendations that have been prioritized and funded by the board:

EVENTS & FESTIVALS STRATEGY

- RFP released, and VSC hosted meetings with destination partners and local stakeholders to build understanding/partnership on objectives

CUSTOMER SERVICE TRAINING INITIATIVE

- RFP released, and VSC began review of proposals

INTERNATIONAL VISITATION

- Signed a renewal contract with Black Diamond for trade/PR representation in the UK, beginning July 2021

PASO ROBLES & SLO COAST WINE

- Ongoing partnership with Paso Robles Wine Country Alliance & SLO Coast Wine Collective through their representation on the Marketing Committee

- Worked with PRWCA to gain access to critical SLO CAL winery data that will be integrated into VSC's monthly community business intelligence reports in FY 2022

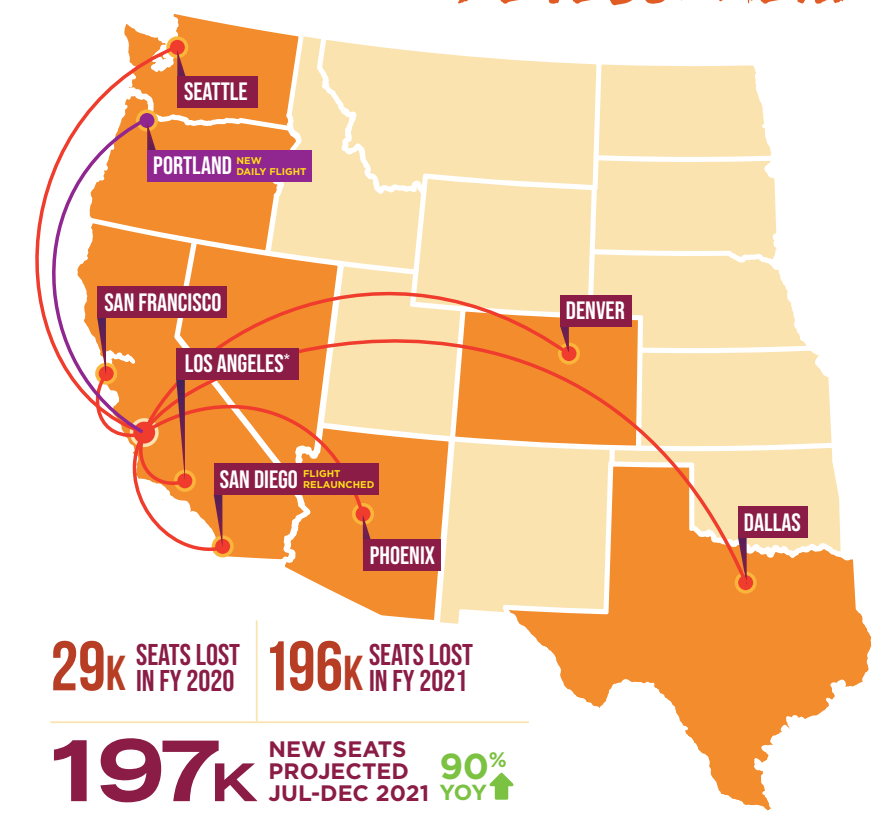
COUNTYWIDE TRAIL SYSTEM

- Advocated for extension and connection of Bob Jones Trail from Avila Beach to San Luis Obispo, approved by the County in March 2021

SPACE LAUNCH EVENTS

- Created new landing page on SLOCAL.com to inform visitors about planned space launches at Vandenberg Space Force Base

AIR SERVICE DEVELOPMENT



29k SEATS LOST IN FY 2020

196k SEATS LOST IN FY 2021

197k NEW SEATS PROJECTED JUL-DEC 2021

90% YOY ↑

*Temporarily suspended; scheduled to return in FY 2022.

Source: Voltaire

72% CY 2020 TOTAL AIR SERVICE OF CY 2019 BASELINE

VISIT SLO CAL BUDGET



YEAR IN REVIEW

FY 2021



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



COVID-19 RESPONSE

- Reallocated \$600k in surplus funds toward spring media budget, spending over \$1 million from February to June
- Reached agreement with the County to offer 1,200 lodging-employees-only vaccine appointments, which was later expanded to the broader hospitality industry
- Developed the COVID-19 Recovery Tracker report to track the SLO CAL tourism industry's recovery against its competitive set
- Created a jobs board for investors and partners facing a critical hospitality labor shortage
- Hosted biweekly SLO CAL Tourism Task Force calls with local destination partners and wine associations for communication and alignment of countywide marketing, communications and advocacy efforts
- Provided regular email updates and resources throughout the phased reopening process



ADVOCACY

- 2 INDUSTRY MEETINGS WITH ASSEMBLY MEMBER CUNNINGHAM
- 2 INDUSTRY MEETINGS WITH REPRESENTATIVE CARBAJAL
- 6 INTRODUCTION MEETINGS WITH NEWLY ELECTED OFFICIALS

KEY ADVOCACY INITIATIVES

Oceano Dunes SVRA

Advocated against the proposed full closure of the Oceano Dunes SVRA in favor of a more balanced solution

Camp Roberts

Drew awareness to infrastructure challenges and municipal revenue losses surrounding Camp Roberts' proposed designation as a migrant children facility

WHY TOURISM MATTERS

CY 2020 IMPACTED BY COVID-19

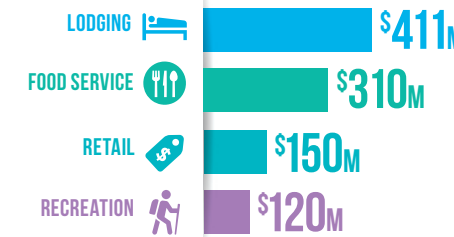


WITHOUT TOURISTS
EACH SLO CAL HOUSEHOLD
WOULD NEED TO SPEND
AN ADDITIONAL
\$11,121
TO CREATE THE SAME ECONOMIC BENEFIT
for the community

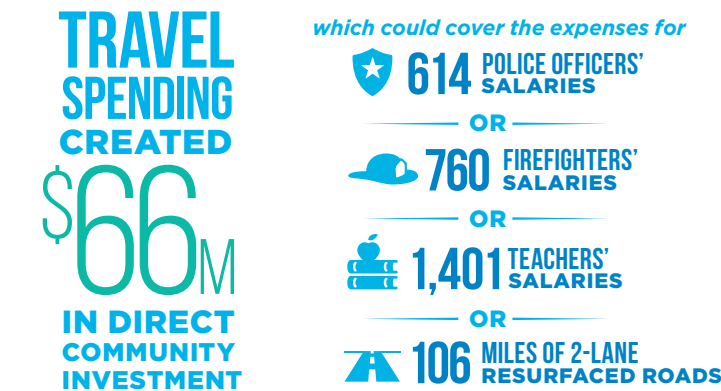
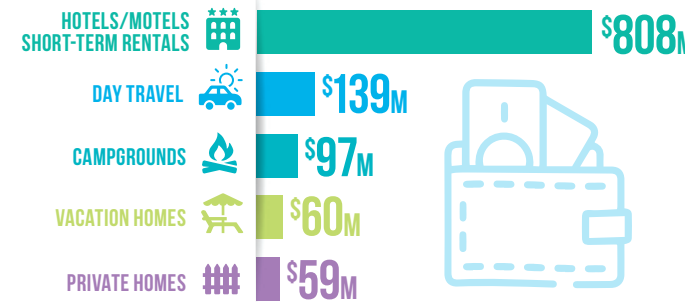
WITHOUT STATE & LOCAL TAX REVENUE
GENERATED BY TRAVEL & TOURISM
EACH SLO CAL HOUSEHOLD WOULD
PAY AN ADDITIONAL



DIRECT SPENDING BY SECTOR

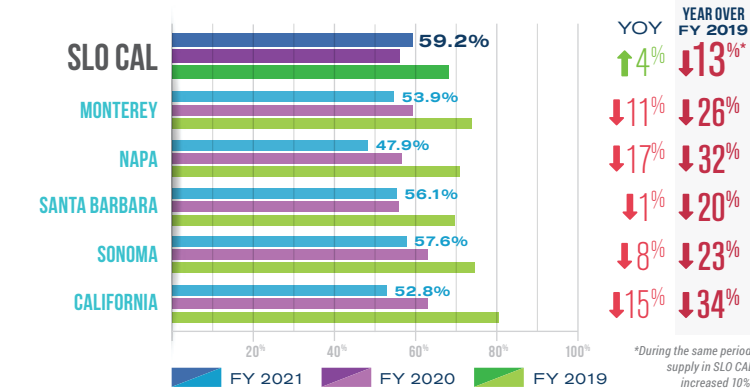


DIRECT SPENDING BY ACCOMMODATION TYPE

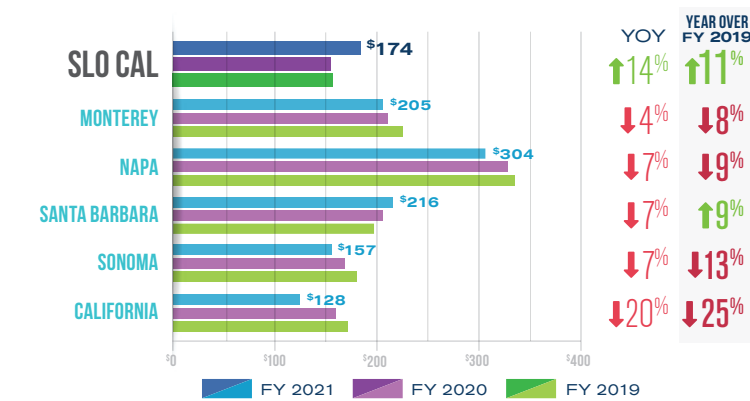


TOURISM COMPRISES 6.0% OF COUNTYWIDE GDP

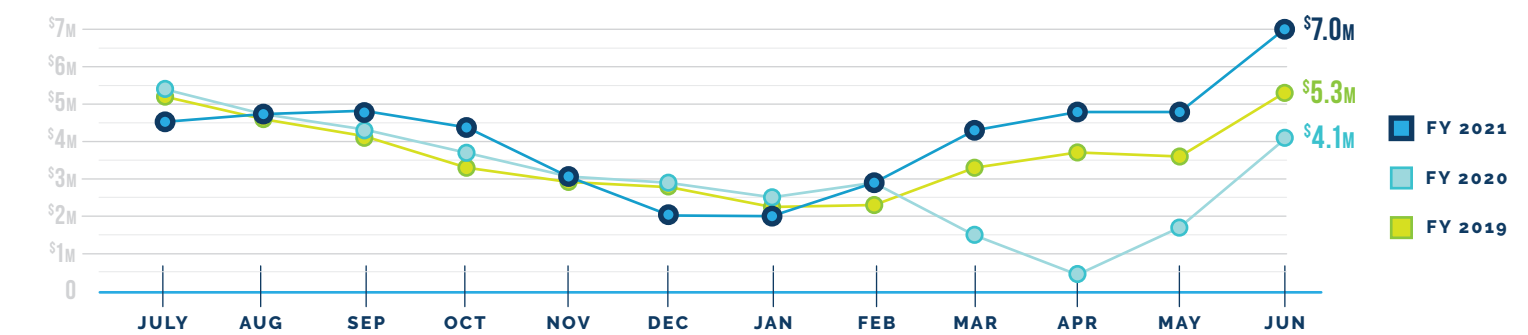
HOTEL OCCUPANCY (OCC)



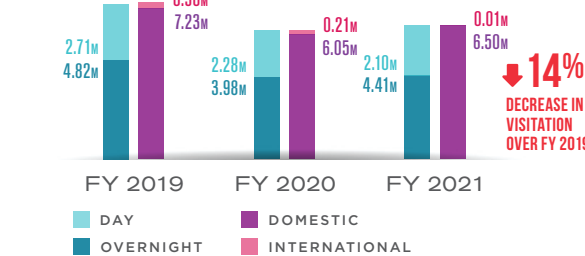
AVERAGE DAILY RATE (ADR)



TRANSIENT OCCUPANCY TAX (TOT)



VISITOR VOLUME

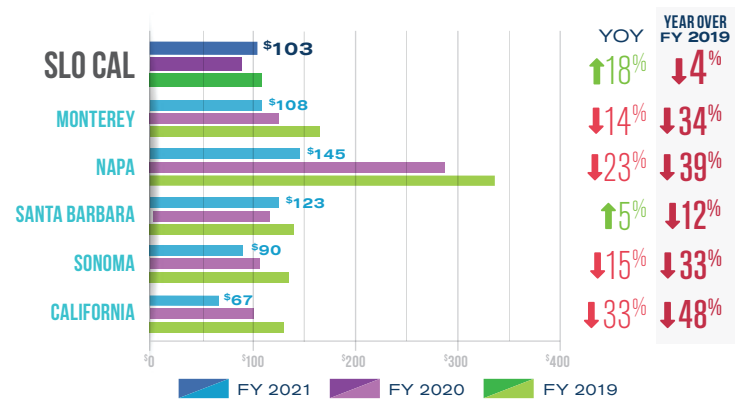


FY 2021 COMPARISONS

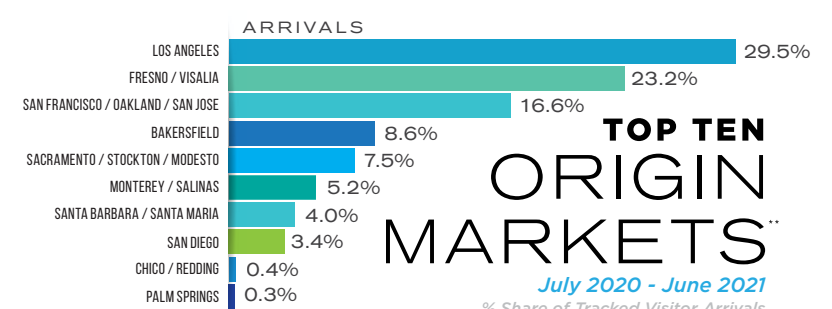
LENGTH OF STAY**
1.17 DAYS
July 2020 - June 2021

CROSS-VISITATION**
1.36 COMMUNITIES PER ARRIVAL
July 2020 - June 2021

REVENUE PER AVAILABLE ROOM (REVPAR)



TOP TEN
ORIGIN
MARKETS**
July 2020 - June 2021
% Share of Tracked Visitor Arrivals



Sources: Dean Runyan, Inc., American Road & Transportation Builders Association, San Luis Obispo County Office of Education, U.S. Bureau of Labor Statistics, Tourism Economics

Sources: STR, Inc., Visit SLO CAL, Tourism Economics

**Comparisons to FY 2019 are not available.