

# SDTA MEMBER UPDATE

MARCH 22, 2021



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# Mayor Todd Gloria

37<sup>th</sup> Mayor of the City of San Diego





# CONVENTION CENTER UPDATE

Clifford “Rip” Rippetoe, President and CEO



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# CITYWIDE SALES UPDATE

Angie Ranalli, Vice President of Sales

- Citywide client communication/feedback
- Citywide team
- Citywide production
- Looking ahead/trends

# MARKETING UPDATE

Kerri Kapich, COO



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# TURNING THE CORNER

- 100 Million+ Vaccines have now been administered - 20% of the total U.S. population has received at least one dose
- President Biden has set a goal to have every U.S. Adult eligible for the vaccine starting May 1st to enable citizens to safely gather again in time for July 4<sup>th</sup> Holiday
- State of California updated Blueprint for Safer Economy and adding a “Green Tier”
- Re-opening guidelines being updated and new guidelines coming for indoor events, meetings and conventions

# FY22 TOURISM OUTLOOK

1. Uncertainty for Indoor Group Events, Meetings and Conventions in California
  - CDPH guidelines continue to evolve on capacity and attendance caps
  - Re-opening timing is TBD for San Diego
2. International travel restrictions being worked on as vaccines expand and airlines set new safety measures including possible digital health credentials
3. Growing confidence in air travel versus just auto
4. Pent-up demand for travel – especially leisure
5. Economic concerns, new business norms and shift in consumer behaviors shaping a new travel landscape



# San Diego County Travel Forecast

March 2021 update

Market expected to correct in 2022 as room demand catches up to increases in supply. However, Expenditures will take longer to recover.

<b>San Diego Tourism Summary Outlook</b> (annual % growth, unless stated)								
	2018	2019	2020	2021	2022	2023	2024	2025
Visits	2.5%	-1.9%	-59.2%	73.7%	37.8%	2.2%	2.8%	2.5%
Day	3.0%	-3.3%	-67.3%	99.3%	51.3%	2.1%	2.4%	2.3%
Overnight	2.0%	-0.5%	-51.3%	57.3%	26.7%	2.3%	3.2%	2.8%
Expenditure	6.1%	1.3%	-55.6%	47.5%	38.3%	6.2%	5.9%	5.1%
Day	5.8%	-0.2%	-69.1%	111.8%	56.1%	0.7%	2.4%	2.8%
Overnight	6.1%	1.5%	-54.3%	43.1%	36.4%	6.9%	6.3%	5.3%
Hotel Sector								
Room supply	0.5%	2.2%	-6.8%	7.9%	2.2%	0.4%	0.7%	0.7%
Room Demand	2.4%	-0.2%	-40.9%	28.3%	25.9%	3.4%	3.3%	2.9%
Occupancy (%)	78.5	76.6	48.5	57.7	71.1	73.2	75.1	76.7
ADR (\$)	\$165.77	\$165.96	\$129.30	\$128.00	\$146.40	\$155.89	\$163.27	\$168.89



# San Diego Tourism Recovery Spring – Summer 2021 Advertising

\$8+ Million Media (February – June)


	<u>Channels</u>	<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>
<b>Local:</b> Stay Diego	TV, Digital		San Diego				
<b>Spring Awareness:</b> Happiness is Calling You Back	Digital Video, Audio, Display, Native, Social				California, Arizona		
<b>Promotional:</b> Yay WeekYays!	Audio, Display, Native, Social				California, Arizona		
<b>Spring Awareness:</b> Happiness is Calling You Back	TV, Out-of-Home				Spot TV: LA, PHX, TUC, SF OOH: LA, PHX, SF		
<b>Storytelling:</b> Always-On Content	Social, Digital, Native				California, Arizona		
<b>Consideration &amp; Booking:</b> Pull-Through	Digital, OTAs, SEM, Social				Travel Interested: California, Arizona Active Travel Planners: Western Region		


# Native Editorial: Custom Content with TravelZoo & Condé Nast's SELF Magazine

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## Why San Diego is (at Least) Six Vacations in One



 **Randi Redmon**  
Deal Expert

Mar 15, 2021

In partnership with:



Whether you plan to go now or later, travelers can feel safe in the guidelines San Diego has set forth regarding **COVID protocols**.

To those who've never experienced **San Diego**—and even to some who have—it's the ultimate SoCal beach city, whose 70 miles of prime coastline tell you all you need to know about the place (in a nutshell: sun, surf and serious *Endless Summer* vibes). And no one's saying those aren't totally worthy getaway goals, because even if you did nothing more there than park yourself on any of the iconic local beaches, the vacation would inevitably go down as one of your best. But, the city packs so many bonus escapes—thanks to a whole series of world-onto-themselves neighborhoods—we can't let you miss out.



Granted, you've probably heard of some of these neighborhoods before, and you may well have spent time in a few. But even the oldest among them have new offerings you won't want to deprive yourself of—particularly when said offerings are the kind you read off a menu. (Note that in a city that's almost comically famous for its good weather, alfresco dining was a beloved way of life well before 2020 rolled around.)

So whether you're thinking about your first visit to San Diego—or you're a returning devotee—check out this guide to six of our favorite neighborhoods.

[Article: Why San Diego is \(at least\) Six Vacations in One](#)

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## San Diego's Top Outdoor Activities to Boost Your Well-Being

Sunshine and sand are good for the soul.

[f](#) [t](#) [p](#)

[Article: San Diego's Top Outdoor Activities to Boost Your Well-Being](#)

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## Explore miles of serenity on land.

Rugged cliffsides, coastal pine forests, and smooth, sandstone canyons are just a few of the natural wonders you'll discover while exploring **Torrey Pines State Natural Reserve**, proving that not all hiking trails are created equal. There is no better way to connect with San Diego's natural habitat than by following one of the well-kept trails winding along the seaside cliffs. Breathe in the smell of coastal sage as a hawk soars overhead, stop to admire the unobstructed views of the Pacific Ocean, and walk among the nation's rarest pine trees—it's an

# San Diego Tourism Recovery Summer – Fall 2021 Advertising - Proposed

## \$8 Million Media (July – December)

	<u>Channels</u>	<u>Jul</u>	<u>Aug</u>	<u>Sep</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>
<b>Brand Awareness:</b> Happiness is Calling You Back	Digital	California, Arizona					\$1.3M
<b>Brand Awareness:</b> Happiness is Calling You Back	TV, Out-of-Home	Spot TV: LA, PHX, TUC, SF OOH: LA, PHX, SF					\$4.5M
<b>Storytelling:</b> Always-On Content	Digital	California, Arizona					\$695K
<b>Consideration &amp; Booking:</b> Pull-Through	Digital, SEM	Travel Interested: California, Arizona Active Travel Planners: Western Region					\$1.2M
<b>Group Meetings:</b> Happiness Is	Digital, SEM	National					\$85K
<b><u>TOTAL MEDIA SPEND</u></b>							<b><u>\$8M</u></b>



## Continue to invite travelers back to San Diego with “Happiness is Calling You Back” messaging

- Strongly aligns with travel priorities (having fun - 67.6%, relaxation - 66.8%, finding happiness - 60.9%) - *Destination Analyst*
- Continue to include responsible/ safe traveler visuals and messaging as long as necessary
- Based on media performance, use existing assets into January, supplementing and/or refreshing as necessary



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## NEW Initiative: San Diego is Open for Meetings

NEW “Happiness Is” group meetings campaign in development for FY 2022 to announce San Diego is open for meetings and conventions.



San Diego is defined by a Sunny Outlook:  
a place that inspires positivity and optimism.

### Leisure

San Diego's positivity and optimism is fueled by  
our good vibes and wide-open spaces.



Brand Extension

### Groups/Meetings

San Diego's positivity and optimism inspires  
endless creativity, innovation and opportunity.





SMILE  
*You're in San Diego*







# GROUP SALES UPDATE

Margie Sitton, Senior Vice President of  
Sale and Services

- Meeting planner sentiment
- Hotel meetings lead trends
- Booking pace
- Site experiences
- Simpleview refresher/training

# THANK YOU



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