

Mayor Todd Gloria

37th Mayor of the City of San Diego







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





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 4th 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
- 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.

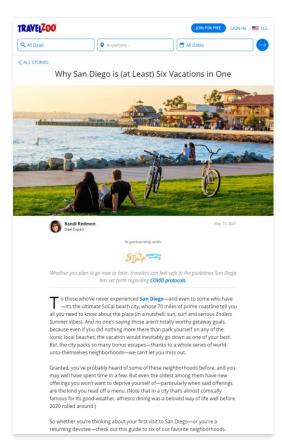
San Diego Tourism Summary Outlook (annual % growth, unless stated)									
	2018	2019	2020	2021	2022	2023	2024	2025	
Visits	2.5%	-1.9%	-59.2%	73.7%	37.8%	2.2%	2.8%	2.5%	
Day	3.0%	-3.3%	-67.3%	99.3%	51.3%	2.1%	2.4%	2.3%	
Overnight	2.0%	-0.5%	-51.3%	57.3%	26.7%	2.3%	3.2%	2.8%	
Expenditure	6.1%	1.3%	-55.6%	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	

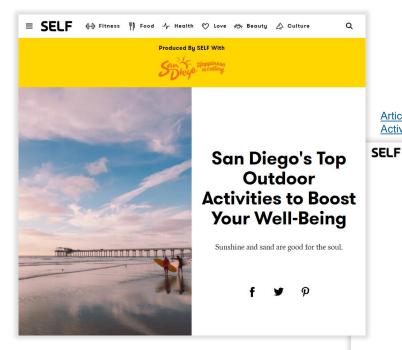
San Diego Tourism Recovery Spring – Summer 2021 Advertising

\$8+ Million Media (February – June)

	Channels	<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>
Local: Stay Diego	TV, Digital		San E	Diego			
Spring Awareness: Happiness is Calling You Back	Digital Video, Audio, Display, Native, Social				Californi	a, Arizona	
Promotional: Yay WeekYays!	Audio, Display, Native, Social				Californi	a, Arizona	
Spring Awareness: Happiness is Calling You Back	TV, Out-of-Home					PHX, TUC, SF A, PHX, SF	
Storytelling: Always-On Content	Social, Digital, Native				California, Ar	izona	
Consideration & Booking: Pull-Through	Digital, OTAs, SEM, Social				erested: Califorr el Planners: We:		

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





Article: Why San Diego is (at least)
Six Vacations in One

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



(H) Fitness ♥ Food - Health ♥ Love * Beauty A Culture

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)

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

Brand Campaign: Happiness is Calling You Back

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





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.







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

