



SFP TMD

San Francisco Peninsula
Tourism Marketing District

**Positioning Our Destination for
Future Success
June 28, 2023**

2022 Expedia Campaigns By City

City	Room Nights	Gross Bkg (\$USD)	Economic Impact
Belmont	1,425	\$259,613	\$908,647
Brisbane	346	\$76,887	\$269,103
Burlingame	4,213	\$752,663	\$2,634,319
Half Moon Bay	581	\$214,360	\$750,259
Millbrae	2,439	\$432,816	\$1,514,857
Pacifica	302	\$66,384	\$232,344
Redwood City	1,514	\$250,054	\$875,187
San Bruno	1,951	\$290,689	\$1,017,411
San Carlos	607	\$109,339	\$382,685
San Mateo	1,716	\$317,708	\$1,111,979
South San Francisco	6,195	\$1,013,962	\$3,548,868
Unincorporated/Other	305	\$132,840	\$464,940
	21,594	\$3,917,314	\$13,710,600

- ROA (Return on Assessment collected) for SSF hotels is 4.3; Entire SMC is 4.2
- SSF BEST performer of ANY city in 2022 Expedia campaigns!
- 165 Group leads sent to SSF Hotels.
- Key partnerships with SSF Conference Center, Dominic's SF Wine School, Moonstar, JobTrain, Chamber of Commerce
- Board Members from: A/C Hotel, Fairfield Inn, Embassy Suites

March 2023 Pharma Forum Trade Show NYC

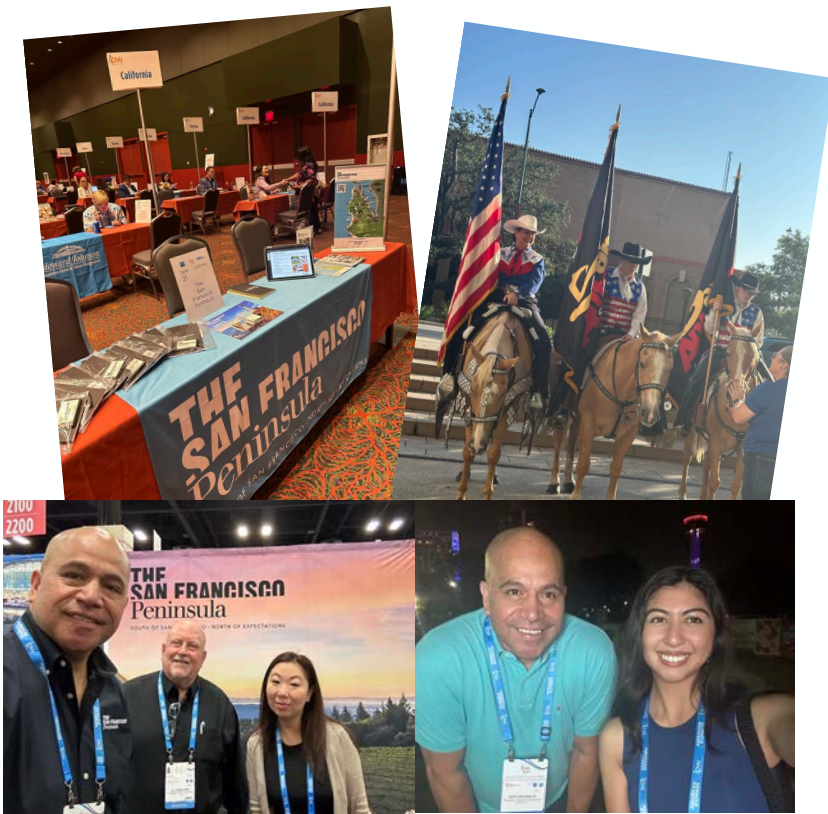
Joint effort with SSF Conference Center – Stacey San Pedro



International Travel Tradeshow (IPW)

May 2023 – Joined by Dean Lehr, Hotel Focus

Media Marketplace

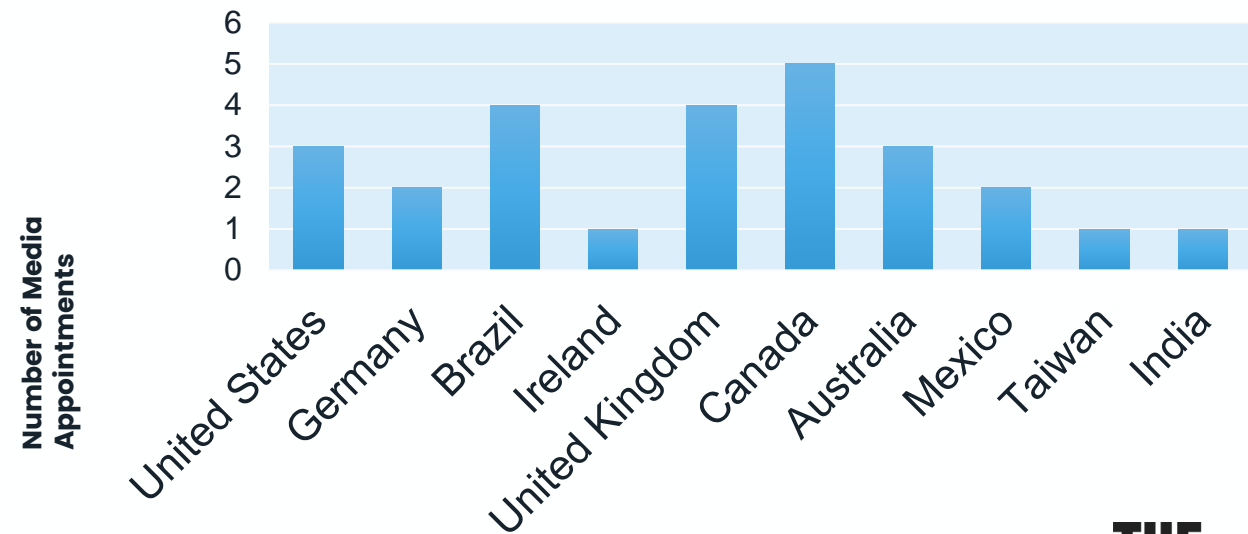


Communications Manager Jacqueline met with 25+ international travel journalists at IPW's Media Marketplace to showcase our region.

Key Takeaways

- Media has shown majority interest in the following topics: family-friendly travel, solo women travel, sustainability, luxury, "soft adventure" and "hidden gem" weekend getaways.
- 8 and counting follow ups - interested in coming next year (tagging from IPW in LA).

IPW Media Marketplace Appointments



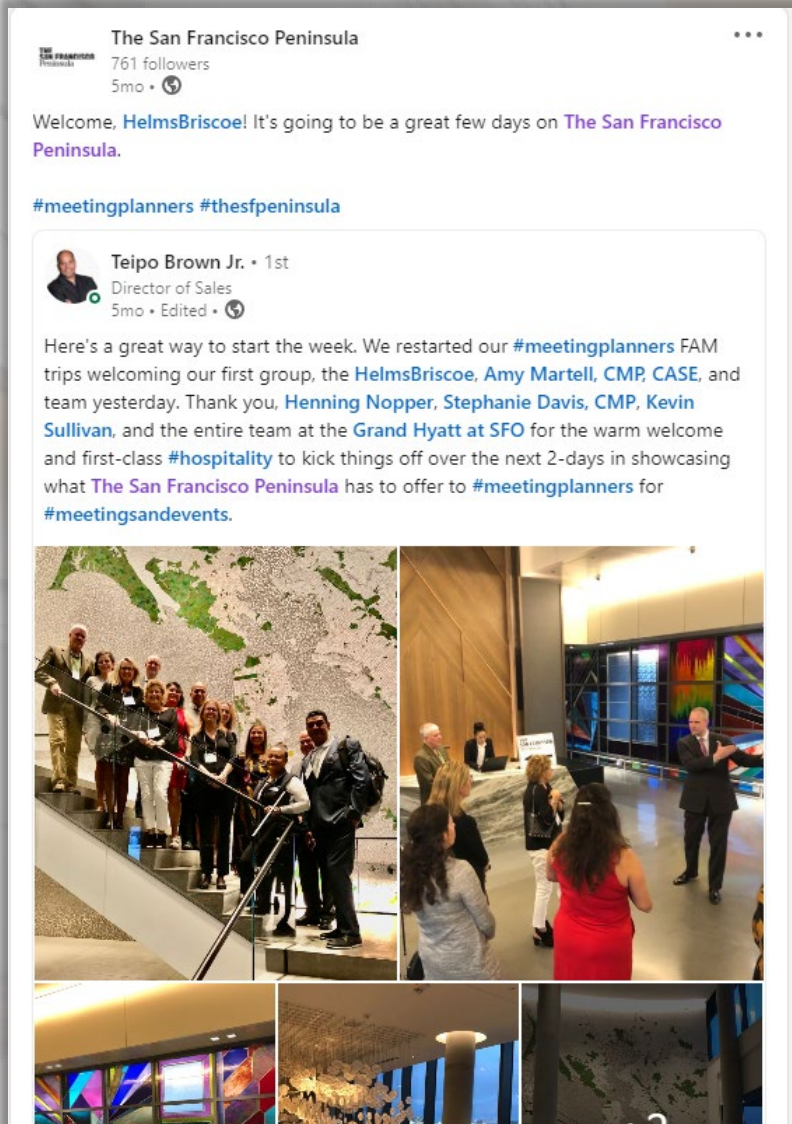
Represented Countries (Media's targeted reader audience)

THE
SAN FRANCISCO
Peninsula

2023 Initiatives

- 31 Trade Shows/Meeting Industry Events
- Spring Domestic Expedia Campaign (May- June)
- International Expedia Campaign in partnership with Visit Sonoma and SF Travel (April - December)
- Now a preferred partner with San Francisco Travel. Others include Helms Briscoe, Global Cynergies, Prestige Global Meetings.

November 2022 FAM Tour Closing Dinner at SSF Conference Center



Closing night dinner for 8 Helms Briscoe Meeting Planner (Florida) held at South San Francisco Conference Center

November 2022 Taste of South San Francisco



Featuring As
Fresh as it Gets

SMC Farm to
Table Program

Peninsula Restaurant Week Success

PENINSULA
Restaurant week



Peninsula Restaurant Week

Thank you to all 123 participating restaurants!



7 Mile House



A Grape in the Fog

ADRESTIA
Adrestia

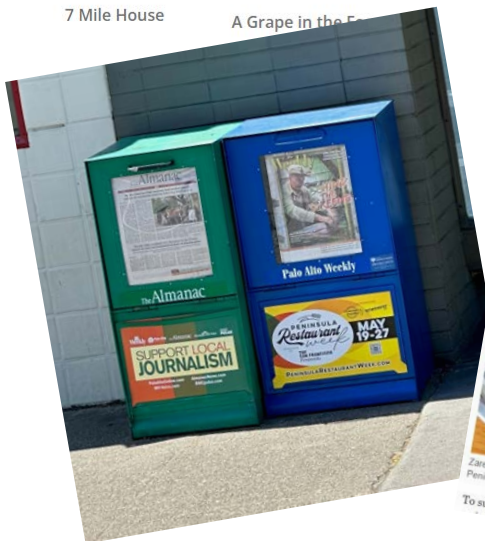


Alhambra Irish House

AMBER INDIA

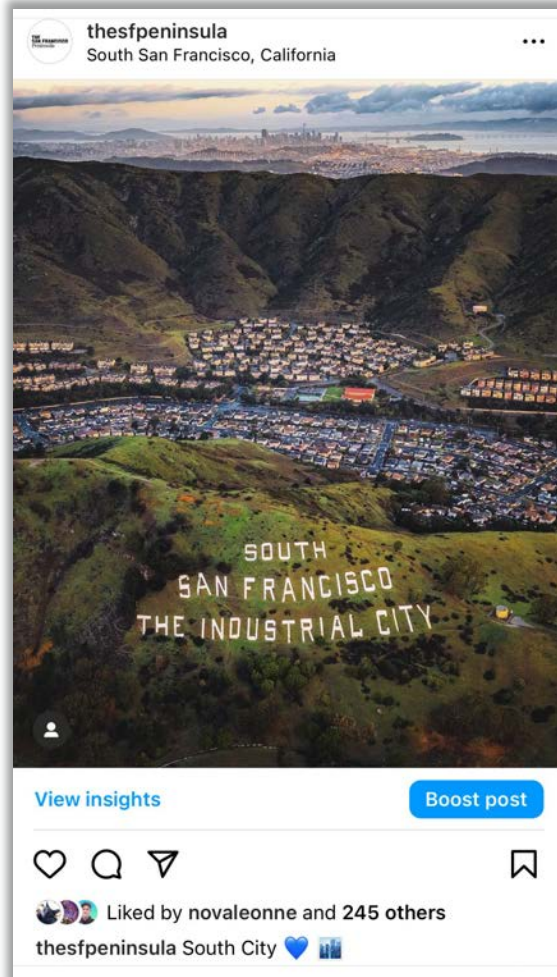
Amber
Restau

AMOURA
RESTAURANT



THE
SAN FRANCISCO
Peninsula

Social Media Features – South San Francisco



Content Mentions: Jan. 2022 – June 2023

Owned Blog Posts:

- April 28, 2023: Restaurants with Great Views in The Bay Area
Features AC Waterfront Lounge
- March 30, 2023: Easter 2023 Events on The San Francisco Peninsula
Features See's Candy headquartered in South San Francisco, as well as Parks & Rec's 92nd Annual Easter Bunny Experience
- November 10, 2022: Restaurants Serving Thanksgiving Dinner on The San Francisco Peninsula
Features Dominic's on the Go in South San Francisco
- October 13, 2022: Halloween Events On The San Francisco Peninsula
Features Blind Testing White Wines event at San Francisco Wine School
- January 2, 2022: Great Hotels Near The San Francisco Bay Trail
Features Sonesta ES Suites and links to other South San Francisco hotels

Content Mentions: Jan. 2022 – June 2023

Promoted Events (43 events):

- Concert in the Park: Culture & Community Festival in South San Francisco
- "Bohème Out of the Box" in South San Francisco
- Cinco de Mayo Specials at the AC Waterfront Lounge
- Easter Bunny Photo Hop & Egg Hunt 2022 in South San Francisco
- The Evolution of South Australian Grenache at San Francisco Wine School
- BATTLE OF THE GRAPES III: Northern Italy vs Southern Italy benefitting Museo Italo Americano at San Francisco Wine School
- 2022 Anniversary Celebration & Scholarship Auction at San Francisco Wine School
- Intro to Blind Wine Tasting at San Francisco Wine School
- Intro to Blind Wine Tasting at San Francisco Wine School
- Wines of Willamette Valley Oregon at San Francisco Wine School
- Intro to Food Pairing at San Francisco Wine School
- Intro to Food Pairing at San Francisco Wine School
- Wines of Washington State at San Francisco Wine School
- Rosé Wines of the World at San Francisco Wine School
- Intro to Italian Wines at San Francisco Wine School
- Napa Valley Wines at San Francisco Wine School
- Crus Classés de Graves at San Francisco Wine School

Content Mentions: Jan. 2022 – June 2023

(Continued)

- Introducing Cult Oenologist Roberto Cipresso and his Inaugural California Pinot Noir Portfolio Release at San Francisco Wine School
- Blind Tasting Thick-Skinned Red Wines at San Francisco Wine School
- Blind Tasting Thin-Skinned Red Wines at San Francisco Wine School
- Sweet and Fortified Wines of the World at San Francisco Wine School
- Celebrate Black History Month at San Francisco Wine School
- Wines of Italy at SF Wine School
- Chardonnays of the World at the San Francisco Wine School
- 34th Annual Taste of South San Francisco 2022
- San Francisco Antiquarian Book, Print & Paper Fair 2022
- Easter Brunch at the AC Waterfront Lounge
- Mother's Day Brunch at the AC Waterfront Lounge
- Valentine's Day Menu at the AC Waterfront Lounge
- Valentine's Day Dinner at the AC Waterfront Lounge
- South San Francisco Downtown Walking Tour
- Redwood City Downtown Walking Tour
- San Carlos Downtown Walking Tour
- Pescadero Walking Tour
- "The Nutcracker" in South San Francisco
- "Abundance: A 2-dimensional Art Show" in South San Francisco
- Santa Comes to Town 2022 in South San Francisco
- Roderick Chambers - Live at Hula Hoops
- Jackie Chavez - Live at Hula Hoops
- Roderick Chambers - Live at Hula Hoops
- Easter Bunny Photo Hop & Egg Hunt 2023 in South San Francisco

Content Mentions: Jan. 2022 – June 2023

Owned Social Media Posts:

- April 29, 2023: Promoted Restaurants with Great Views blog post featuring AC Lounge
- January 12, 2023: Promoted reel featuring “Karl the Fog” cocktail at AC Lounge
- November 20, 2022: Promoted Thanksgiving Dinners blog post featuring Dominic’s on the Go
- November 16, 2022: Promoted Thanksgiving Dinners blog post featuring Dominic’s on the Go
- November 14, 2022: Promoted Thanksgiving Dinners blog post featuring Dominic’s on the Go
- October 22, 2022: Promoted Halloween blog featuring San Francisco Wine School
- October 15, 2022: Promoted Halloween blog featuring San Francisco Wine School
- July 22, 2022: Promoted Restaurants with Great Views blog post featuring AC Lounge
- February 22, 2022: Featured a photo of Sign Hill

Media Mentions Due to Our Efforts:

June 2023: San Francisco Wine School featured in, “San Mateo County: With endless discoveries, the San Francisco Peninsula invites visitors to get lost while discovering the region,” by Christine Moore, Modern Luxury

What Is the San Mateo County/Silicon Valley Convention and Visitors Bureau? How Is It Related to the San Francisco Peninsula?

The San Mateo County/Silicon Valley Convention and Visitors Bureau (CVB) is a destination marketing organization (DMO) created in 1971 as a 501 (c) (6) by SMC hotel owners and managers responsible for attracting convention, business, international, and leisure visitors. In 2001, a TBID funding model was adopted (4th district in U.S. to do so). 'The San Francisco Peninsula' branding strategy was launched in 2022. In 2023, it began the process of converting its District from the '89 to '94 Act. Assessment Fees (\$.15 - \$1.00) paid by Hotel Guests have not increased since 2001.

SFP TMD

San Francisco Peninsula
Tourism Marketing District

The logo for CIVITAS features a stylized arch of five colored squares (blue, grey, blue, orange, blue) above the word "CIVITAS" in a bold, blue, sans-serif font.

CIVITAS

SMGCONSULTING
Strategy and Creativity Matter.

Destinations
that
RECENTLY
Converted
from '89 Act
to '94

Destination	Year Converted
Stockton	2010
Sacramento	2012
Fairfield	2013
West Hollywood	2013
Huntington Beach	2014
Lodi	2015
Richmond	2015
Carmel-by-the-Sea	2016
Palm Springs	2016
Vacaville	2016
Paso Robles	2017
Yolo County	2017
Monterey County	2018
Pasadena	2018
San Jose	2018
Dana Point	2019
Laguna Beach	2020
Morro Bay	2021
Santa Clara	2021

Current Funding Significantly Below Comparable Destinations

Destination	Revenue - 2019 990 and MPAR**
Napa Valley	\$7,721,717 MPAR \$1,575
Sacramento	\$12,458,000 MPAR \$1,246
Oakland	\$5,180,000 MPAR \$1,170
San Francisco	\$38,112,000 MPAR \$1,128
Sonoma County	\$8,714,471 MPAR \$792
Santa Cruz County 4,400 rooms	\$2,728,000 MPAR \$620
Monterey County	\$7,234,686 MPAR \$603
The San Francisco Peninsula 15,720 rooms	\$3,097,000 MPAR \$197

**MPAR (marketing \$ per available room) is the division of the budget by the number of rooms. \$197 dollars is the lowest MPAR we have come across in a destination.

Civitas Advisors

**\$648
MPAR**

SFP TMD
San Francisco Peninsula
Tourism Marketing District

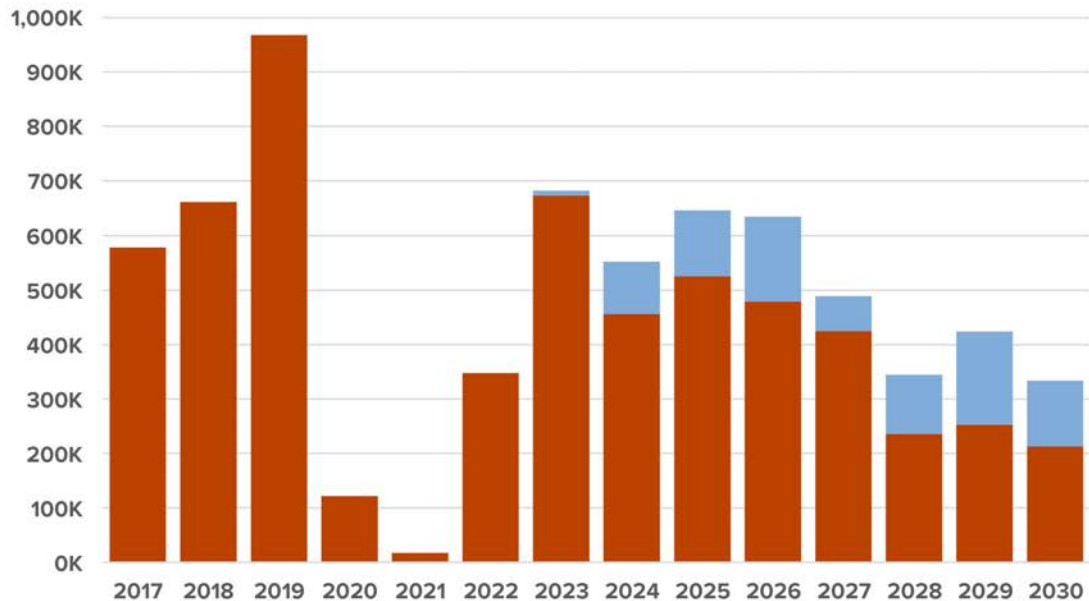
Moscone Center Bookings Down Significantly Through 2030

PRODUCTION UPDATE

MOSCONE PACE: MARCH 2023



Moscone Actual/Blocked Room Nights



Year	Definite	Tentative
2017	578,725	
2018	660,868	
2019	967,956	
2020	121,048	
2021	17,110	
2022	347,788	
2023	672,761	9,455
2024	456,181	96,233
2025	525,400	120,271
2026	478,711	156,371
2027	425,125	64,168
2028	235,998	108,946
2029	252,999	171,256
2030	212,355	121,609

Variance from 8/22:

**-415K Definite
Room Nights**

**+31K Tentative
Room Nights**

SFP TMD

San Francisco Peninsula
Tourism Marketing District

Enhanced Benefits for ALL Hotels...

- **ALL hotels** will automatically become members of the California Hotel Lodging Association with complimentary access to all CHLA training programs and industry advocacy program. Hotels that currently pay CHLA dues directly will realize a savings.
- Dedicated Staff Liaison for non-convention hotels to provide support on issues unique to smaller properties.
- Increased funding will enable us to attract large scale **Room Night Generating Events** which could include music festivals, marathons, athletic events etc. This is a whole new frontier!

San Francisco Peninsula TMD – Proposed Initiatives

Marketing: All Markets	Estimated Revenue	Projected Room Nights	Investment
1. Invest further in attracting Social Media Influencers.	\$1,800,000	9,000	\$150,000
2. Invest in advertising campaigns across all mediums: digital, TV, radio, print to effectively compete with smaller neighboring DMOs (Santa Cruz, Monterey, Tri-Valley etc.).	\$4,000,000	20,000	\$200,000
3. Retain Marketing P/R Agency to identify opportunities where we are currently lacking presence and develop campaigns to support above initiatives.	\$1,800,000	9,000	\$180,000
4. Deploy geo-tracking tool to better understand our current visitor and measure effectiveness of above initiatives.	N/A	N/A	\$75,000
5. Additional staff to support above initiatives.	N/A	N/A	\$637,200

SFP TMD

San Francisco Peninsula
Tourism Marketing District

San Francisco Peninsula TMD - Proposed Initiatives

Convention Sales	Estimated Revenue	Projected Room Nights	Investment
1. Add Convention Sales Representatives to East Coast, Midwest, Sacramento, and Southern California, and International Markets.	\$6,100,000	25,000	\$675,000
2. Add sales representative for hotels in luxury segment. Show participation could include: Financial Insurance Conference Professionals (FICP), Luxury Meeting Summit, Global Meetings and Incentive Travel Exchange (GITME), Corporate Event Marketing Association (CEMA), Pharma Forum targeting feeder markets of New York, Boston, Chicago, etc.)	\$1,750,000	5,000	\$200,000
3. Join competing destinations offering booking incentives.	\$2,200,000	10,000	\$200,000
4. Participate in destination partnership programs with Third Party Meeting Planning Companies such as American Express, Conference Direct, Helms Briscoe etc.	\$1,400,000	6,364	\$175,000
5. Add sales missions and client reception in feeder markets of Midwest, TX, AZ, Southern CA, Washington D.C., and New York.	\$840,000	4,000	\$172,000
6. Increase Familiarization site tours with key planners.	\$880,000	3,911	\$200,000

San Francisco Peninsula TMD – Proposed Initiatives

Leisure Sales	Estimated Revenue	Projected Room Nights	Investment
1. Further develop OTA campaigns during strategic need periods.	\$8,850,000	41,182	\$325,000

Convention Marketing	Estimated Revenue	Projected Room Nights	Investment
1. Partner with key meeting publication companies such as Northstar, Smart Meetings, Connect, Meetings Today for advertising, show sponsorship, FAMS etc.	\$880,000	3,000	\$175,000

Q: What Is the Proposed New Tourism Fee and How Does It Compare?

A: Rate of 1.5% of room revenue for hotels with 5K+ sq. ft. of dedicated meeting space (Group A) / 0.75% (Group B) for all others compares **very** favorably:

- **San Francisco:** 2.5% (hotels near Moscone Center); 1.3125% for all other hotels (Assessment + Convention Center Tax)
- **Oakland:** \$1.50/room night + 3% (Assessment + Measure C)
- **San Jose:** \$1.00-\$3.00 +4% (Assessment + Convention Facility Fee)
- **Sacramento:** 2%-4%
- **Current San Mateo County TBID:** \$0.15 - \$1.00/room night.

The amount charged to guests has not increased since 2001, thus the annual CVB budget has remained flat growing only when hotel rooms are added to the market.

SFP TMD

San Francisco Peninsula
Tourism Marketing District



San Francisco Peninsula Destination Comparison

April 2023

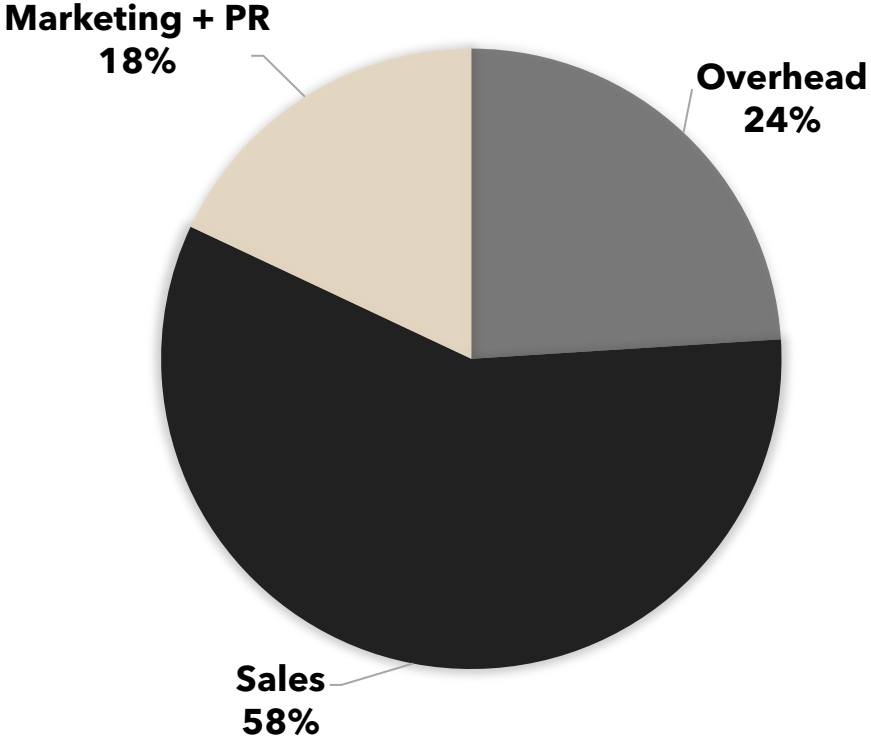
Destination	TOT	TMD Assessment	Total Charge
Atlanta, GA	21.0%	N/A	21.0%
New Orleans, LA	16.0%	1.75%	17.75%
Louisville, KY	16.07%	1.50%	17.57%
Chicago, IL	17.38%	N/A	17.38%
Dallas, TX	15.26%	2.0%	17.26%
Anaheim, CA	15.0%	2.0%	17.0%
Indianapolis, IN	17.0%	N/A	17.0%
Austin, TX	17.0%	N/A	17.0%
Long Beach, CA	13.0%	3.0%	16.0%
Los Angeles, CA	14.0%	2.0%	16.0%
Half Moon Bay, CA	15.0%	0.75%-1.5% + \$1.00/night	15.75-16.5% + \$1.00/night
West Hollywood, CA	12.5%	3.0%	15.5%
Nashville, TN	15.25%	\$2.50/night	15.25% + \$2.50/night
Houston, TX	15.0%	N/A	15.0%
Brisbane / South San Francisco, CA	14.0%	0.75%-1.5% + \$2.50/night	14.75-15.5% + \$2.50/night
Santa Monica, CA	14.0%	\$1.90 - \$6.25 per night	14.00% + \$1.50 - \$6.25 per night
Las Vegas, NV	13.38%	N/A	13.38%
Greater Palm Springs, CA	10.0% - 12.7%	3.0%	13.0% - 15.7%
Miami, FL	13.0%	N/A	13.0%
San Diego, CA	10.5%	2.0%	12.5%
Orlando, FL	12.5%	N/A	12.5%
San Francisco Peninsula, CA	9.5% - 15.0%	0.75%-1.5%	10.25% - 16.5%

Average Lodging Charge for Top 100 Cities - 14.92%

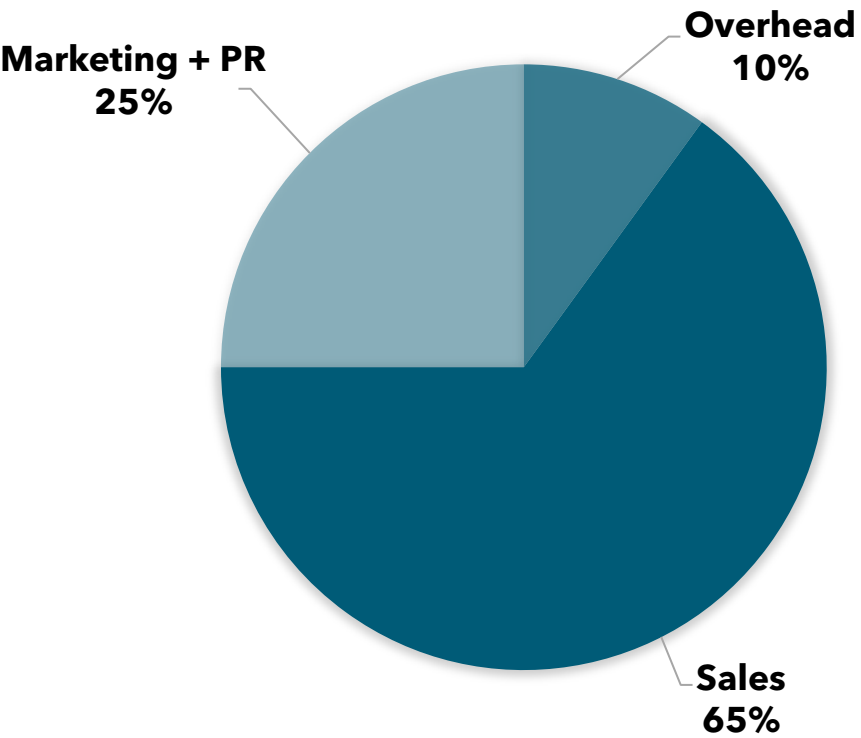
Average Lodging Charge for Cities w/ 350k+ Residents - 15.91%

90% of New TMD Budget Dedicated to Marketing, Sales, and Public Relations Initiatives

TBID Expenses



TMD Expenses

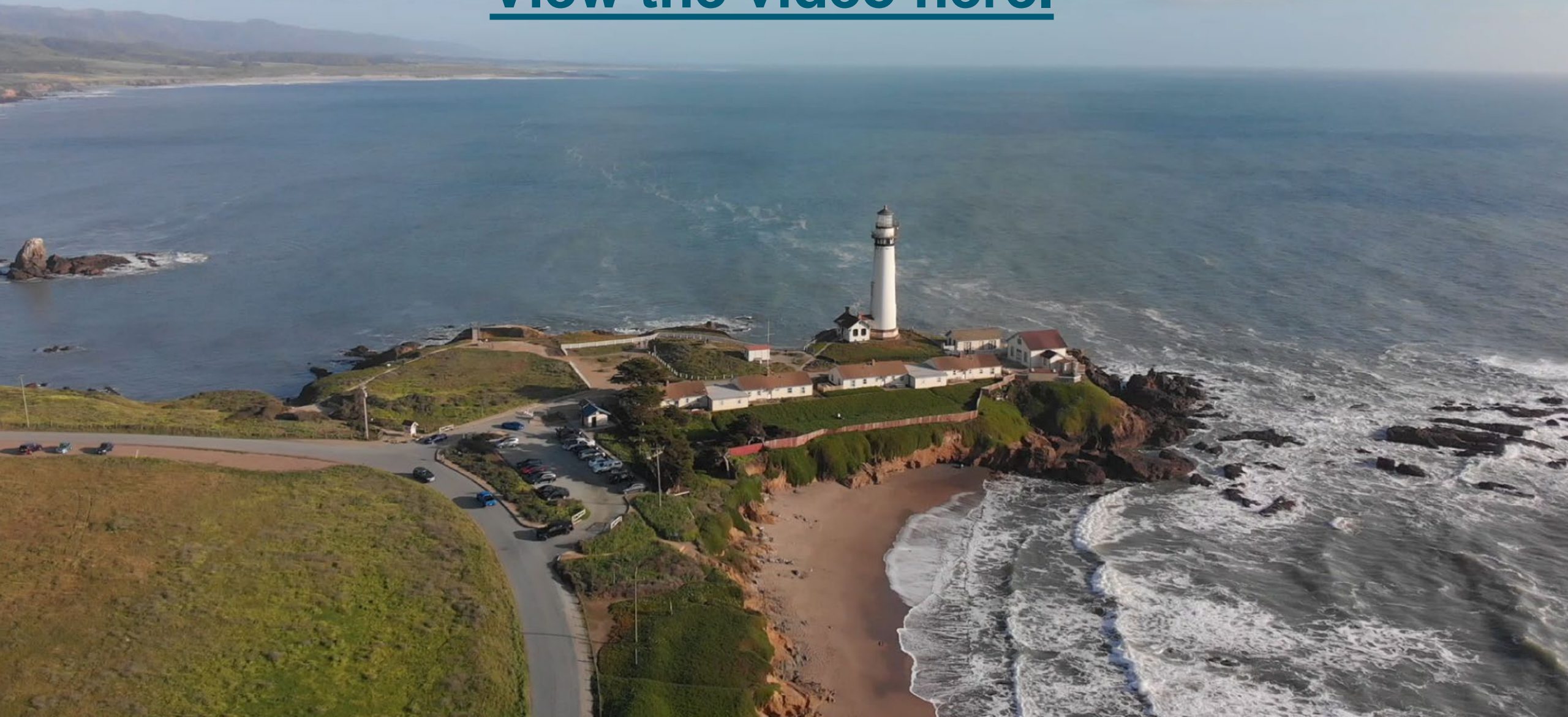


San Francisco Peninsula Tourism Business Improvement District Conversion Timeline (Continued)

City Council - Public Meeting 1. Public Meeting – No action required if not adopting ordinance 2. Optional: Introduce the Ordinance of Formation and have 1 st reading. <i>Public Meeting must be held at least 10 days after Notice of Public Meeting/Hearing is mailed and at least 7 days before Public Hearing is held.</i>	June 20, 2023	City
City Council - Final Hearing 1. Adopt Resolution of Formation 2. Optional: 2 nd reading of Ordinance and Adopt Ordinance of Formation <i>Must be held at least 45 days after Notice is mailed.</i>	July 5, 2023 (next meeting is August 21, 2023)	City
<ul style="list-style-type: none"> '94 District passes 30-day challenge period (Resolution) Ordinance Active (30 days after 2nd Reading) 	August 4, 2023	SFPTMD
District passes 2 nd 30-day challenge period (Ordinance)	September 3, 2023	SFPTMD
City Council - Disestablish '89 District	September 2023	City
District begins collecting assessment	October 1, 2023	SFPTMD

*The Burlingame City Council generally meets on the first and third Monday of each month.

[View the video here.](#)



Re-branding the destination has created a powerful tailwind



Trackable
QR Code

** Distributed at Visit California
Welcome Centers*



**Featured on the Today
Show in collaboration with
Visit California!*



Top Holiday Travel Tips, Deals
& Destinations for 2022

SFP TMD
San Francisco Peninsula
Tourism Marketing District



Thank You!

SFP TMD

San Francisco Peninsula

Tourism Marketing District