



Powell

San Francisco Travel Association Small Business Commission

JANUARY 23, 2023

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WHO WE ARE

OVER A CENTURY OF SERVICE

**For more than 100 years the
San Francisco Travel Association
has worked on behalf of its members
to promote San Francisco as the
destination of choice for conventions
and leisure travel.**

Vision

To be the most compelling destination in the world.

Mission

To promote the San Francisco region as a top global destination by leading the way in performance, innovation, and sustainability.

Our Audiences

- Members
- Meeting Planners
- Travel Trade
- Leisure Consumers
- Media

OUR COMMITMENT



In San Francisco, all are welcome and differences are celebrated. The San Francisco Travel Association is committed to diversity, equity, inclusion, and accessibility to promote unique San Francisco experiences and elevate voices in the community that speak to travelers from around the world. We aim to be a thought leader in our industry, city, and community.

ONE OF OUR MOST IMPORTANT INDUSTRIES



In 2019, San Francisco hosted more than 26.2 million visitors who spent \$10.3 billion during their stay. That makes tourism one of our most important industries. Here's why:

\$819M
Local Taxes

Local taxes generated by visitors to support essential services

86,100
Jobs

In our hospitality and tourism industries were supported by visitor dollars

83%
Small Businesses

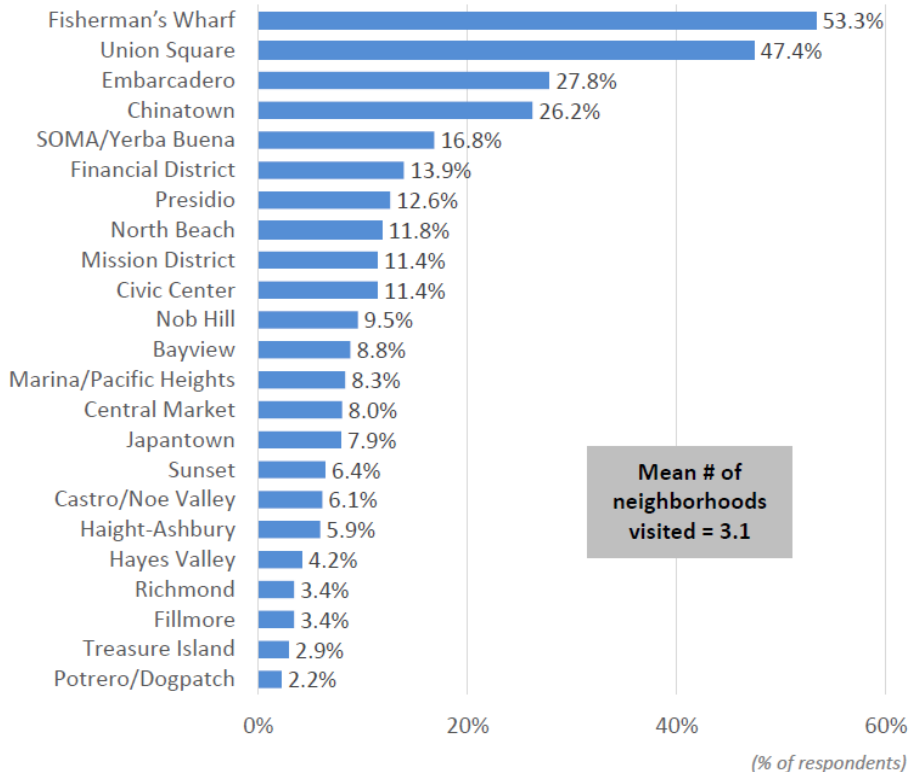
Small businesses dominate the travel and tourism industry
SOURCE: US Travel Association

64%+
Spend

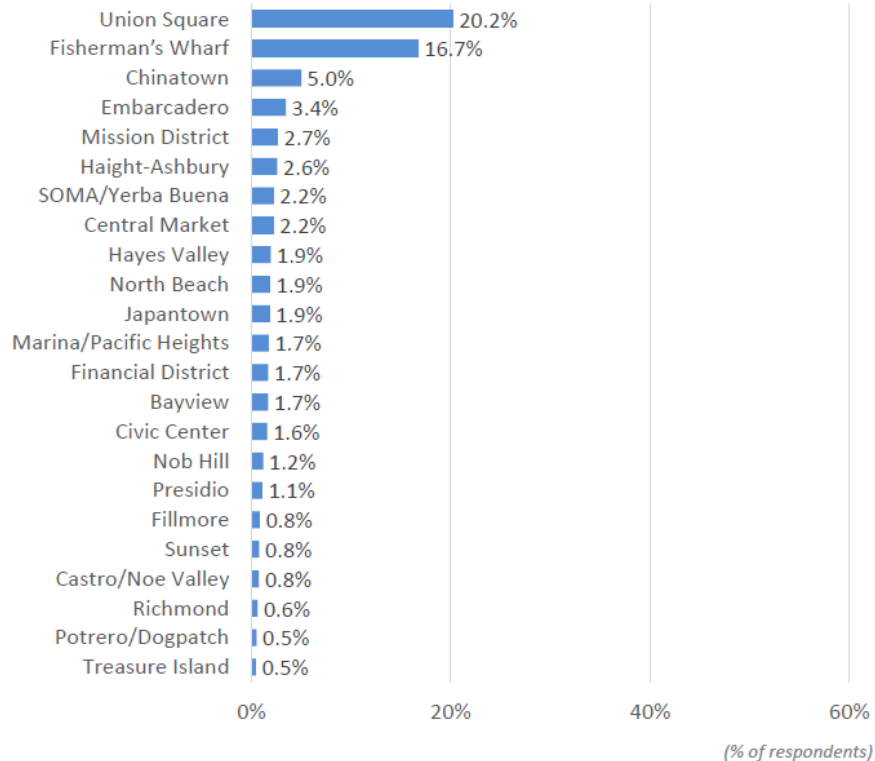
Outside of hotels
SOURCE: Tourism Economics

OUR NEIGHBORHOODS AT A GLANCE

San Francisco Neighborhoods Visited



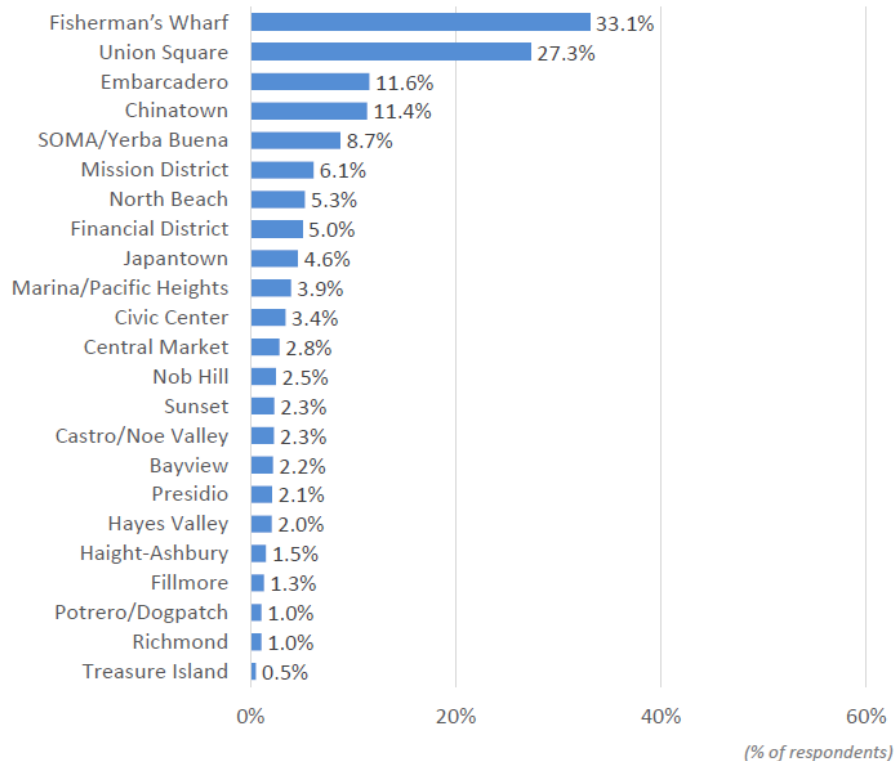
San Francisco Neighborhoods Shopped In



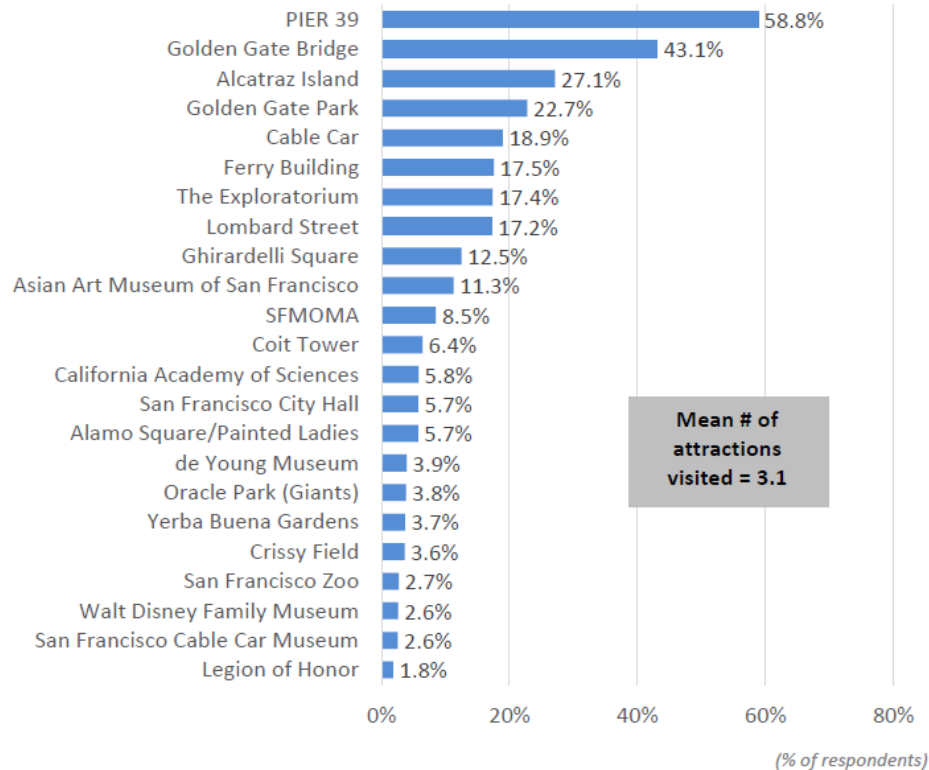
OUR NEIGHBORHOODS + ATTRACTIONS



San Francisco Neighborhoods Dined In



Top Attractions Visited While in San Francisco



MARKETING



A background image of the Golden Gate Bridge and the San Francisco skyline, heavily obscured by a thick layer of fog. The entire image has a warm, orange-red color cast.

Brand is central to all we do.

The background is a photograph of a city street, likely in San Francisco, featuring large, vibrant murals on the walls of buildings. The murals include a large portrait of a person with a colorful, abstract background and other smaller, colorful designs. The street is lined with buildings and trees, and the overall atmosphere is artistic and urban.

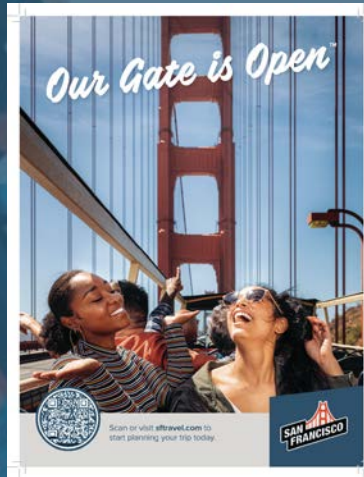
To reach diverse audiences we need to be relevant.

RELEVANCE IS IMPORTANT



To reach diverse audiences we need to be relevant.

- ▶ **Diverse experiences in content**
 - Neighborhoods and small businesses are at the core of these experiences
- ▶ **See themselves here**
- ▶ **Reassure visitors that San Francisco is a welcoming, inclusive and safe destination**
- ▶ **Improves conversion and destination choice**



OUR MESSAGING IS GLOBAL



- ▶ We market directly to leisure consumers in the US and key global markets
 - Canada, Mexico, UK, France, Germany, China, Korea, Japan, Taiwan, and Australia
- ▶ Our tourism development team works with SFO, airlines and travel trade to promote the city globally
- ▶ Our neighborhoods and small businesses are a key selling point

RECOVERY BRAND CAMPAIGN



“Take back the narrative”
and promote all that is exciting about San
Francisco

RECOVERY BRAND CAMPAIGN



**“Take back the narrative”
and promote all that is exciting about San Francisco**



HIGH REACH

Top of funnel – TV,
OOH primary media



KEY VISITOR MEETINGS MARKETS

of NY, Chicago, DC, Boston
and Houston, International
TBD



IN PARTNERSHIP

with the SF Chamber,
OEWD and other key
stakeholders

VIDEO AND PHOTO SHOOT | FEATURED LOCATIONS



Golden Gate Bridge



Washington Square Park /
Coit Tower



Moongate Lounge (Chinatown)



Union Square



Cable Car (Nob Hill)



The Angler (Embarcadero)



The Ferry Building



Mission Dolores Park



Tacolicious (The Mission)



The Castro Theater



Alamo Square Park / Painted Ladies



The Mission



Moscone Center / Yerba Buena Park



Chinatown



Lincoln Park Steps



North Beach / TransAmerica
Building



The DeYoung Museum

VIDEO AND PHOTO SHOOT | FEATURED TALENT



Lady Camden



Music Finalists - Mae Powell & Michael O'Konis



Leung Dragon Troupe



The Angler's Chef Joshua Skenes & Team



Sirron Norris



Axis Dance Co.



CONTENT DEVELOPMENT



Marketing materials are continually developed through diversity and small business lenses

- ▶ Content is framed around our key pillars.
 - Iconic
 - Culinary
 - Diversity
 - Arts & Culture
- ▶ More than 750 individual articles live on sftravel.com
- ▶ Photoshoots
- ▶ Video production



HOW I SEE SF/I AM SAN FRANCISCO FEATURES



George McCallman
Creative Director



Kayla Abe
Business Owner



Ellis Cato
Cable Car Gripman

HOW I SEE SF/I AM SAN FRANCISCO FEATURES



Catherine Liang
Miss San Francisco



Ron Moultrie Saunders
Artist



Joey Yee
YouTuber

ADDITIONAL CONTENT EXAMPLES

◁ Explore San Francisco's
Legacy Businesses

◁ Support Black-Owned Businesses in
San Francisco

◁ LGBTQ+ in San Francisco

◁ What to do in Outer Sunset

◁ Where to Eat in Chinatown

◁ Must-See Attractions in the Richmond
and Sunset Neighborhoods

◁ Best Burritos by Neighborhood

◁ What You Need to Know About
Experiencing Japantown

ARTS & CULTURE PILLAR

- ▶ **Arts Are Open Campaigns**

17+ neighborhoods represented including Bay View, Glen Park, Western Addition, Leather District & Chinatown

- ▶ **Artists & Arts Organizations**

Dozens of Arts Organizations and Artists celebrated including Creativity Explored, ODC, AAACC, Muralists and Musicians.

- ▶ **Freedom to Celebrate**

Juneteenth, Folsom Street Fair, PRIDE, Lunar New Year Parade, Stern Grove and Carnaval



PHOTOSHOOTS



TOURISM



SPOTLIGHT ON DIVERSITY AND SMALL BUSINESSES



► Influencer-led marketing

Two international airline partnerships in June focused on showcasing pride month and local/small businesses– particularly LGBTQ+ owned restaurants and galleries

► Trade FAM trips

Four international travel trade FAM trips, over 50 clients total, exclusively featured local restaurants

► Integrated digital campaigns

Multi-channel co-ops promoting unique content in key international markets (i.e., UK, Mexico, Canada, India)

MEETINGS & CONVENTIONS



WE MAKE SAN FRANCISCO LOCAL TO ALL



- ▶ Meeting Planners
 - Corporate
 - Association
 - Leisure
 - MICE
- ▶ Domestic Groups
 - Attractions/Unique Venues
 - Hotels
 - Offsite Events
 - Restaurants/Culinary
- ▶ International Market
 - Culinary Experience
 - Shopping
 - Unique Neighborhoods

ESTIMATED GROUP ATTENDEE SPEND

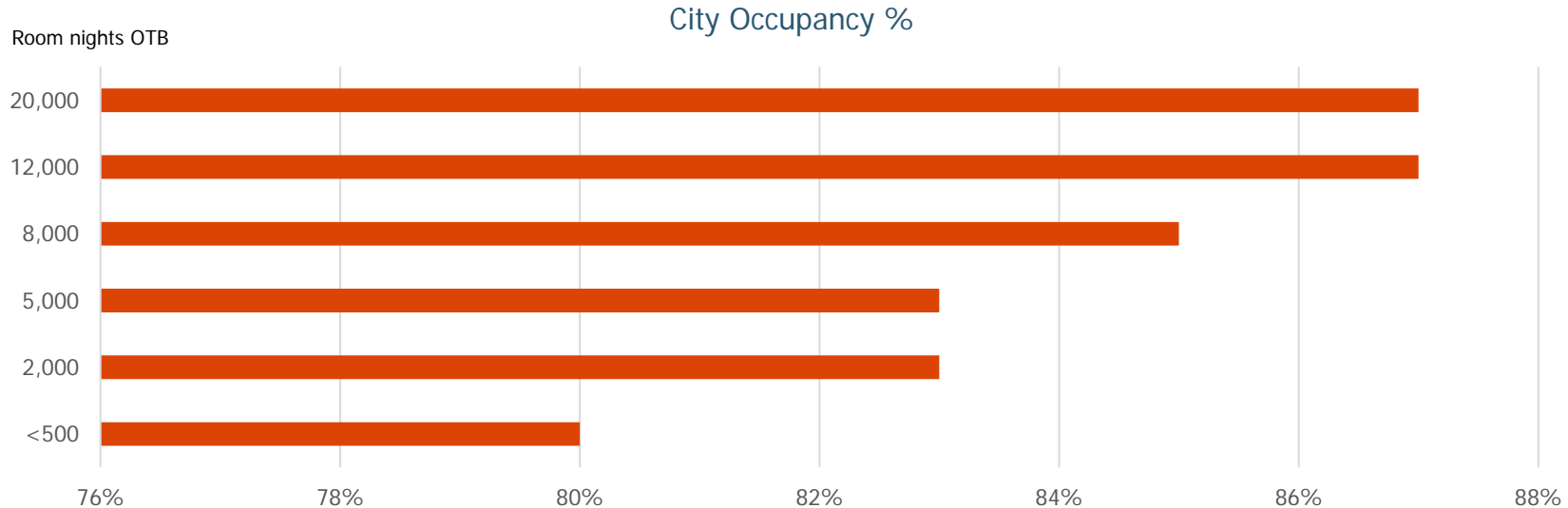


Spending/Impact	2019	2020	2021
Total Attendee Spending	\$1.2 B	\$95 M	\$92 M
Citywide Impact	\$446 M	\$14 M	\$3 M
Self-Contained Impact	\$730 M	\$81 M	\$89 M

MOSCONE LODGING IMPACT

To determine the impact of room bookings by San Francisco Travel, we can look at accommodation metrics on dates with different numbers of bookings. The compression (volume of hotel room nights vs availability) is key to driving revenue throughout the City.

Daily Impact of San Francisco Travel Room Bookings



Source: STR

San Francisco Hotel Compression Grid

Fisherman's Wharf (3,149 Total Rooms)

- Sheraton Fisherman's Wharf (525)
- Marriott Fisherman's Wharf (285)
- Courtyard Fisherman's Wharf (127)
- Holiday Inn Fisherman's Wharf (585)
- Hotel Zephyr (355)
- Hyatt Fisherman's Wharf (313)
- Argonaut Hotel (252)
- Holiday Inn Express Fisherman's Wharf (252)
- Pier 2620 (234)
- The Tuscan (221)

Civic Center/Van Ness Corridor (2,009 Total rooms)

- Courtyard Van Ness Ave(157)
- Holiday Inn Golden Gateway (499)
- Whitcomb Hotel (458)
- Holiday Inn Civic Center (394)
- Hotel Kabuki/JDV (218)
- Yotel (203)
- Proper (131)
- Hotel Majestic (58)

Union Square (9,514 Total Rooms)

- Westin St. Francis (1,195)
- SF Marriott Union Square (400)
- JW Marriott (337)
- Hotel Adagio, Autograph (172)
- Courtyard SF Union Square (166)
- Hilton San Francisco (1,908)
- Hilton Parc 55 (1,008)
- Grand Hyatt (659)
- Hotel Nikko (533)
- Sir Francis Drake/Kimpton (417)
- Handlery Union Square (377)
- Clift Hotel (373)
- Serrano Hotel (236)
- The Marker/JDV (201)
- Villa Florence (183)
- Hotel Zeppelin (164)
- Axiom Hotel (152)

34,020 Total Rooms

14 mi radius
8,942 Rooms

1.5 mi radius
4,824 Rooms

1.1 - 1.5 mi radius
5,058 Rooms

0.6 - 1.0 mi radius
9,514 Rooms

0 - 0.5 mi radius
5,883 Rooms

Moscone
Convention Center

Moscone/SOMA
(6,079Total Rooms)

- SF Marriott Marquis (1,500)
- Park Central SF (681)
- Palace Hotel (556)
- Courtyard SF Downtown (405)
- W San Francisco (404)
- St. Regis (260)
- Intercontinental (554)
- Four Seasons (277)
- Hotel Zelos (198)
- Virgin Hotel
- The Pickwick (192)
- Hampton Inn SF (174)
- The Mosser (166)
- Best Western Plus Americana (143)
- Hotel Via (138)
- Hotel Abri (119)
- Hotel Zetta (116)

SFO Airport / Millbrae Corridor (8,942 Total Rooms)

- Marriott SF Airport Waterfront (688)
- Westin SF Airport (397)
- Aloft SF Airport (271)
- Hyatt Regency SF Airport (789)
- Hilton SF Airport Bayfront (400)
- Doubletree Airport (395)
- Embassy Suites Airport Waterfront (340)
- Embassy Suites Airport (312)
- Crowne Plaza Airport (309)

Nob Hill (2,097 Total Rooms)

- Ritz-Carlton (336)
- Fairmont San Francisco (591)
- Stanford Court Hotel (393)
- Intercontinental Mark Hopkins (380)
- The Scarlet Huntington (135)
- Executive Hotel Vintage Court (107)
- Orchard Hotel (105)
- Nob Hill Hotel (50)

Financial District (2,968 Total Rooms)

- Le Meridien (360)
- Hyatt Regency San Francisco (805)
- Hilton Financial District (566)
- Omni San Francisco (362)
- Hotel Vitale/JDV (200)
- Galleria Park/JDV (177)
- Loews Regency San Francisco (158)
- Hotel Triton (140)
- Harbor Court (131)
- Hotel Griffon (62)

REACHING OUT TO EXPERTS



Meet the experts helping to make San Francisco inclusive



Willie L Benjamin II, DES
VP, Meetings & Event Experiences
Credit Union National Association
(CUNA)



Robin Preston
Managing Director
American Institute Architects



Cid Wilson
President & CEO
Hispanic Association on Corporate
Responsibility (HACR)

Johnnie White
CEO & Executive Vice President
American Society of Appraisers

2022 SF WELCOME AMBASSADOR RESULTS



105,422

Attraction/
Museum Info



59,640

Business
Information



277,734

Directions
Provided



5,586

Event
Information



60,035

Photo
Assistance



22,452

Positive
Neighborhood
Engagement



4,849,640

Public
Greetings



15,747

Restaurant
Recommendations



802

Translations



24,614

Hospitality
Escorts



4,267

Welfare
Checks



The image shows the San Francisco City Hall at night. The building's facade is covered in numerous colorful projections of the word "welcome" in various languages and fonts. The central dome is brightly lit with a warm orange glow. The sky is a deep blue. In the foreground, there are some blurred lights and structures, suggesting a public square or plaza.

PUBLIC POLICY

PUBLIC POLICY PRIORITIES

- ▶ Clean and safe streets
- ▶ Housing solutions for people experiencing homelessness
- ▶ Solutions for those struggling with mental health and substance abuse issues
- ▶ Improved transportation
- ▶ Development of new destination product (parks, open space, venues, airport infrastructure).
- ▶ Small businesses support (shared spaces, streamlined business permitting, activation of vacant store fronts, etc)



Thank You!

QUESTIONS?