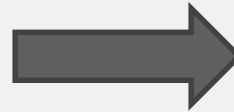


SAN FRANCISCO TRAVEL GLOBAL MARKETING



SAN FRANCISCO VISITOR STATISTICS

SAN FRANCISCO VISITOR STATISTICS
METHODOLOGY



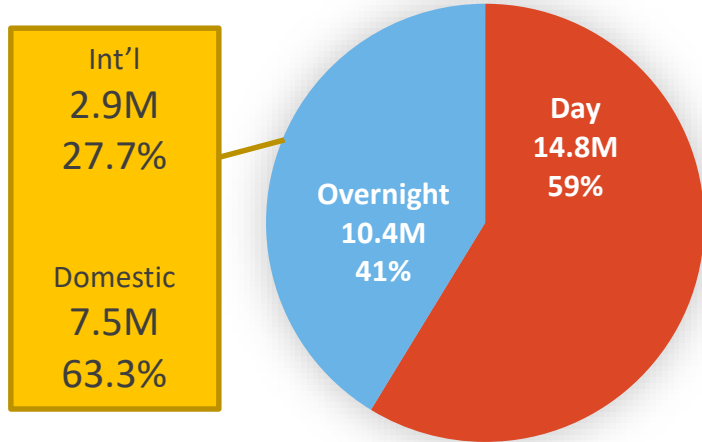
VISITOR FORECAST
SEGMENTATION

Domestic & International
Day & Overnight
Business & Leisure

TOTAL INBOUND

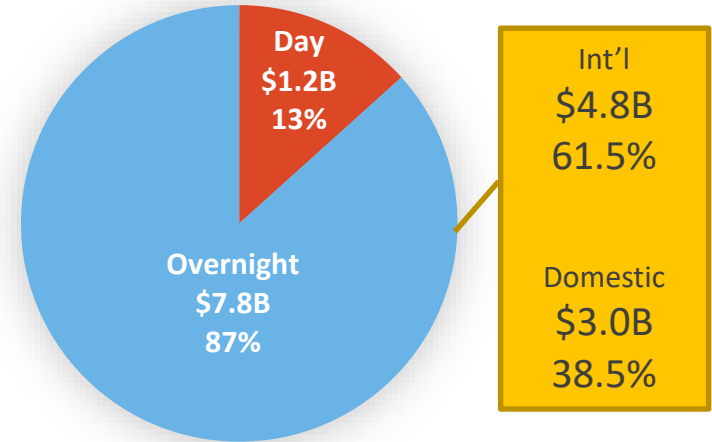
2016 – Summary

Visitor Volume



Total 25.2M
+2.8% YOY

Visitor Spending



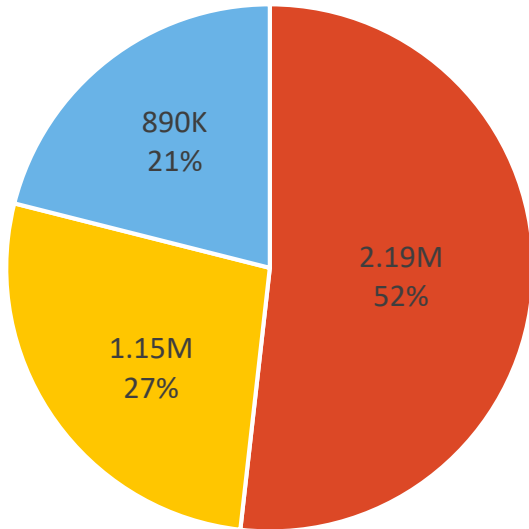
Total \$9.0B
+3.8% YOY

Source: San Francisco Travel Association in conjunction with Tourism Economics; Travel Forecast, SF, February 2017 version

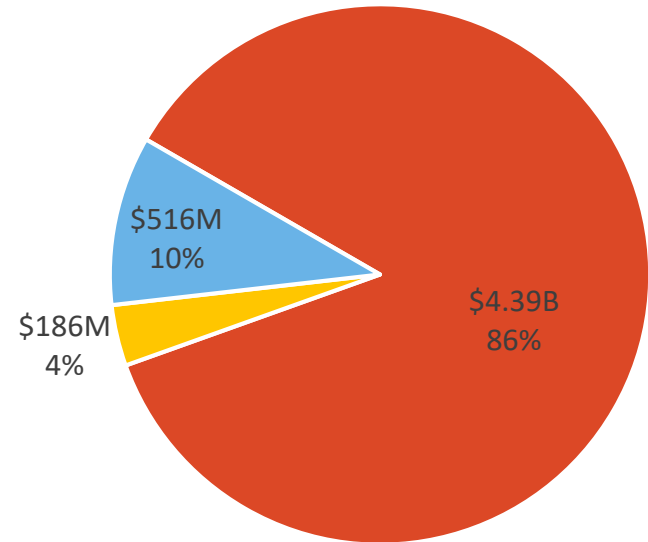
INTERNATIONAL INBOUND OVERNIGHT

2016 – Segmented

Visitor Volume



Visitor Spending



- Top 10 Overseas
- Other Overseas
- Mexico & Canada

Source: Tourism Economics- Global City Travel Database – January 2017; SF-SM Market

INBOUND OVERNIGHT

2016 – Ranked

Visitor Volume

Mexico
China
UK
Canada
Germany
France
Australia
India
South Korea
Japan
Taiwan
Brazil

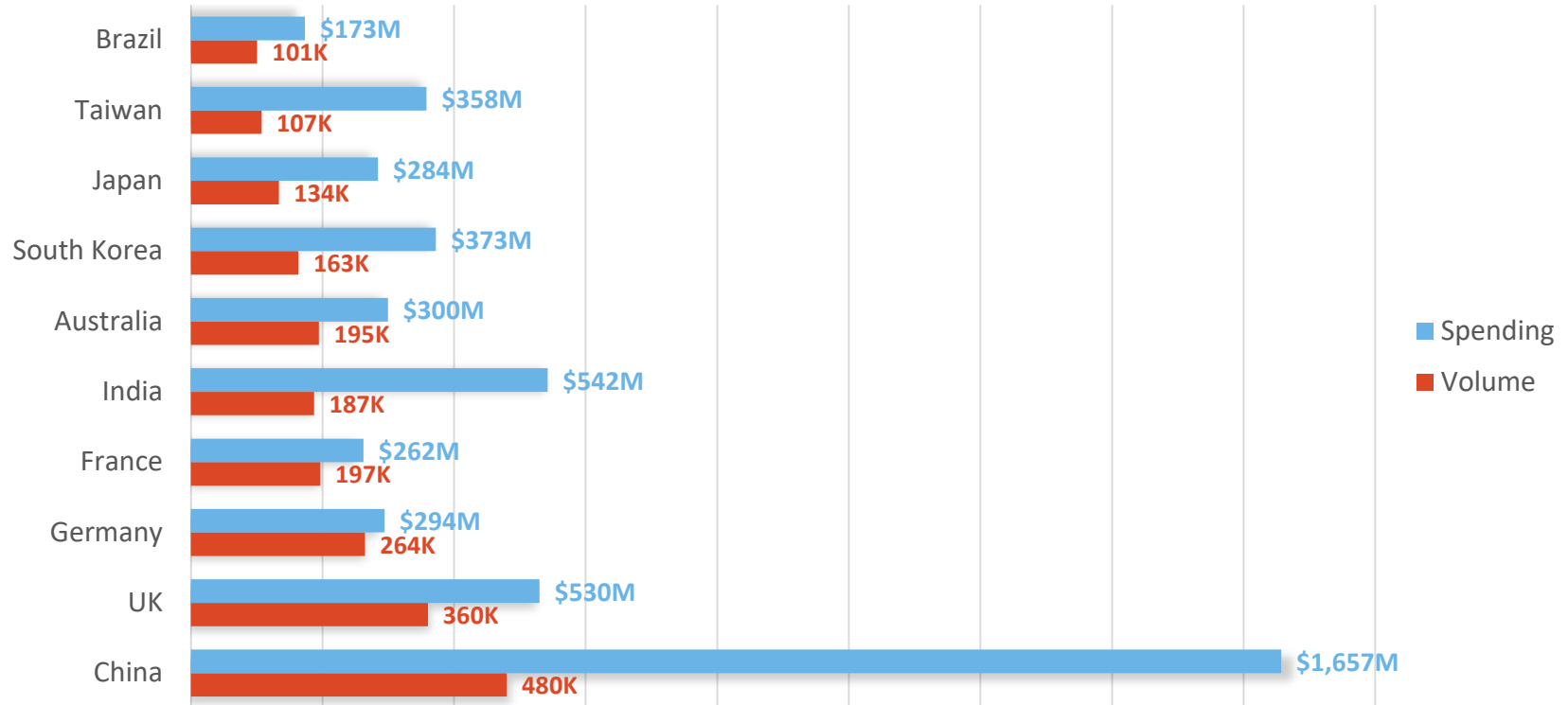
Visitor Spend

China
India
South Korea
UK
Taiwan
Australia
Germany
Japan
Mexico
France
Canada
Brazil

Source: Tourism Economics- Global City Travel Database – January 2017; SF-SM Market

2016 TOP OVERSEAS MARKETS

2016 – By Country



Source: Tourism Economics- Global City Travel Database – January 2017; SF-SM Market

TOTAL TOURISM DIRECT SPENDING

TOTAL TOURISM DIRECT SPENDING

RESULTS

Visitor Spending:

- +3.8% in 2016
- +2.7% in 2017

Convention/Meetings Spending:

- -5.7% in 2016
- -2.0% in 2017

Total Tourism Direct Spending:

- +3.0% in 2016
- +2.3% in 2017



Year	Visitor Direct Spending (Billions \$)	Convention/Meetings Direct Spending (Millions \$)	Total Tourism Direct Spending (Billions \$)
2013	\$7.7	\$723.2	\$8.5
2014	\$8.3	\$748.1	\$9.0
2015	\$8.6	\$740.4	\$9.4
2016	\$9.0	\$698.1	\$9.7
2017F	\$9.2	\$684.1	\$9.9

Source: San Francisco Travel Association in conjunction with Tourism Economics & Destination Analysts

VISITOR VOLUME & SPENDING FORECAST

2016 SAN FRANCISCO OVERNIGHT VOLUME – 10.4 MILLIONS

2017 Overnight Volume Forecast

Total +1.3%

Business

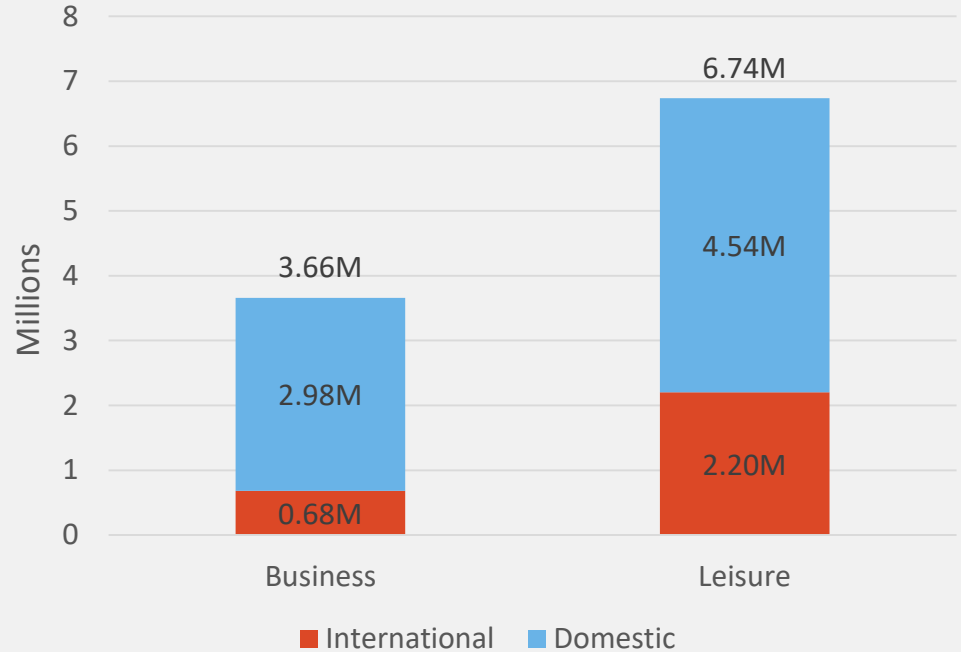
International +0.4%

Domestic +1.1%

Leisure

International +0.2%

Domestic +2.0%

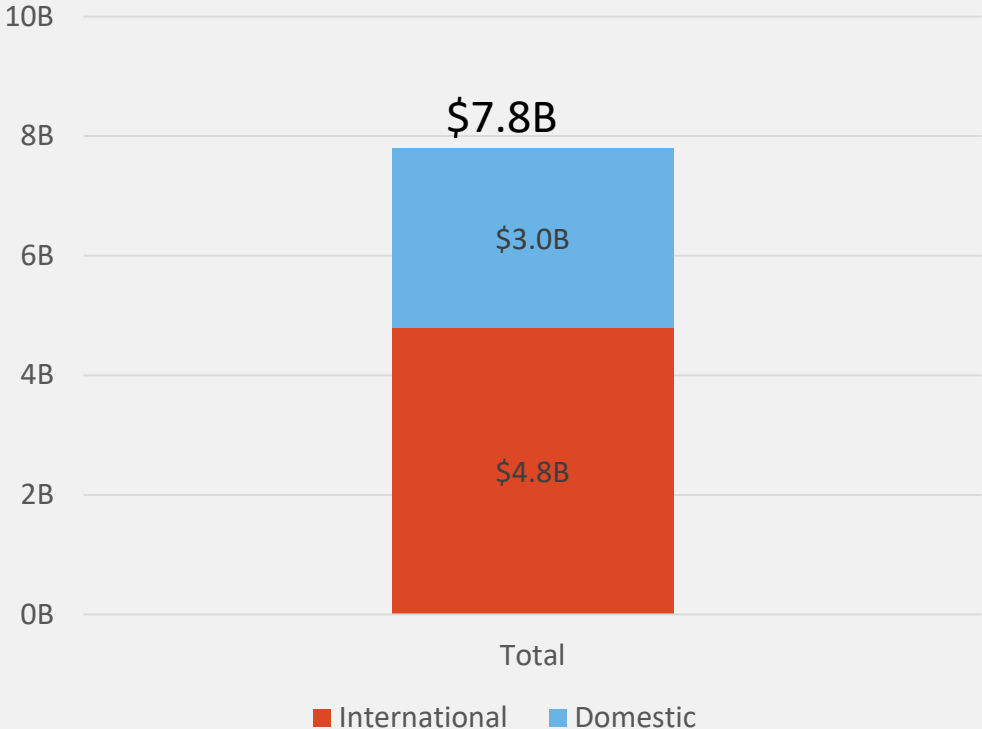


Source: Tourism Economics in collaboration with San Francisco Travel Association – February 2017; SF Market

2016 SAN FRANCISCO OVERNIGHT SPENDING – \$7.8 BILLIONS

2017 Overnight Spending Forecast

<u>Total</u>	+2.6%
International	+2.0%
Domestic	+3.5%



Source: Tourism Economics in collaboration with San Francisco Travel Association – February 2017; SF Market

GLOBAL MARKET RATINGS & TRENDS

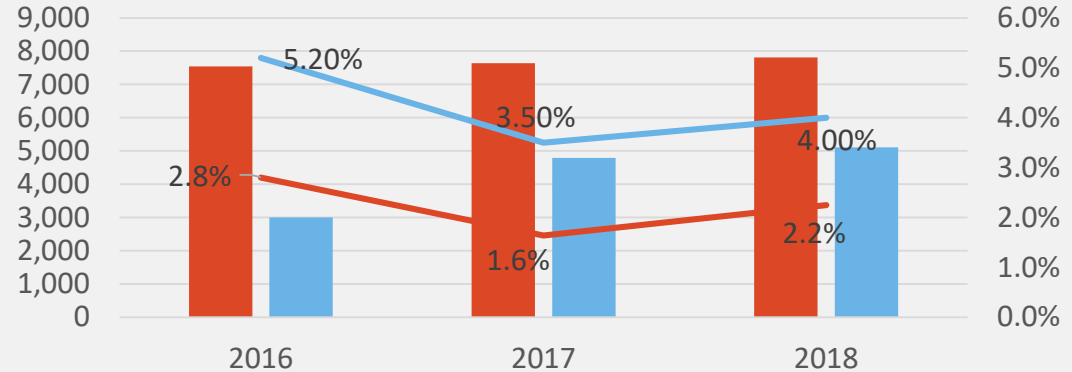


DOMESTIC VS. OVERSEAS MARKETS

In **2017** domestic overnight visitors:

- 72.5% of total overnight visitors.
- 38.8% of total overnight spending

Visitor Volume & Spending



- Visitor Volume (1000's)
- Visitor Spending (1000's)
- Visitor Volume YOY % Chg
- Visitor Spending YOY % Change

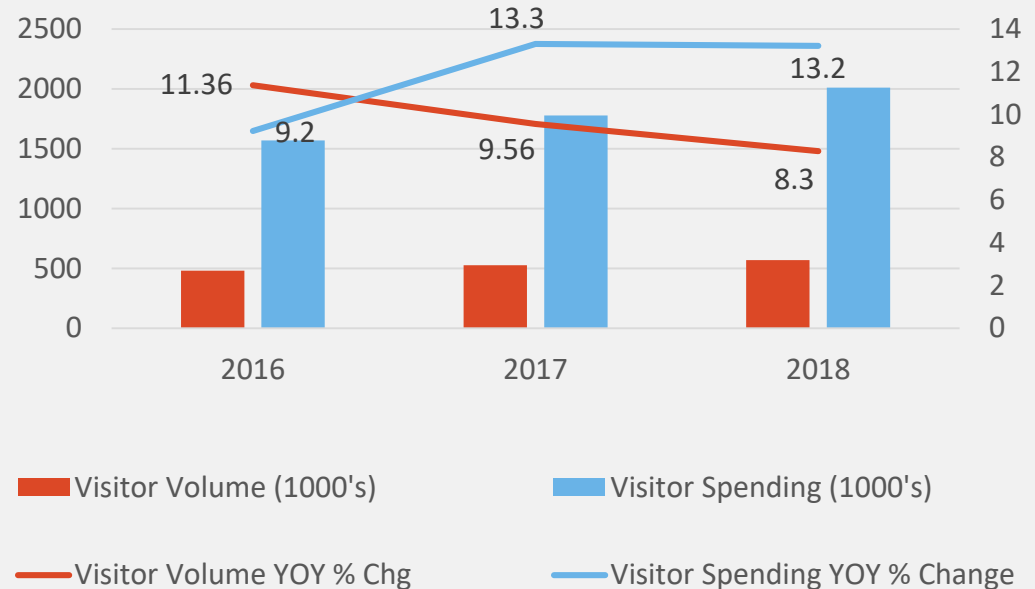
Source: Tourism Economics- Global City Travel Database – January 2017

CHINA VS. OVERSEAS MARKETS

In **2017** China will:

- Rank **1st** for Visitor Volume (526K)
- CA Market Share: 40%
- Rank **1st** for Visitor Volume Growth (+9.6%)
- Rank **1st** for Visitor Spending (\$1.7B)
- Rank **1st** for Visitor Spending Growth (+13.3%)
- CA Market Share:

Visitor Volume & Spending



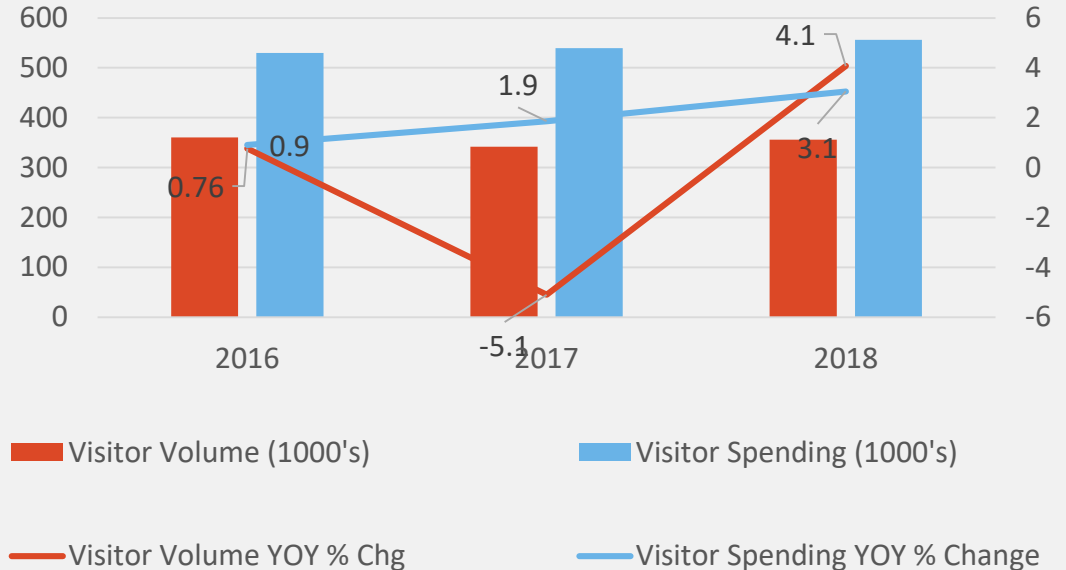
Source: Tourism Economics- Global City Travel Database – January 2017

UK VS. OVERSEAS MARKETS

In **2017** the UK will:

- Rank **2nd** for Visitor Volume (341K)
- CA Market Share: 47%
- Rank **10th** for Visitor Volume Growth (-5.1%)
- Rank **3rd** for Visitor Spending (\$540M)
- Ranked **6th** for Visitor Spending Growth (+1.8%)

Visitor Volume & Spending



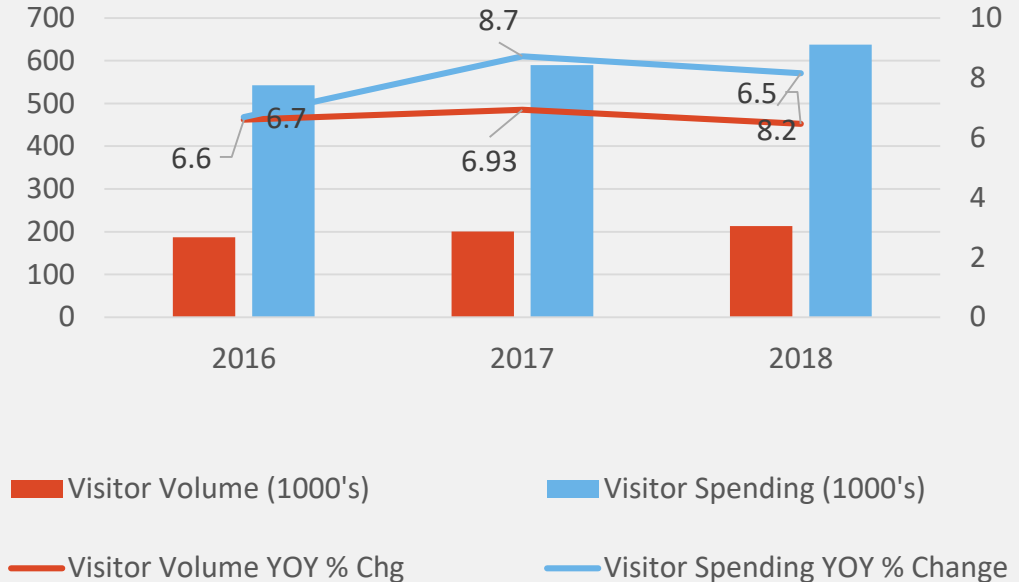
Source: Tourism Economics- Global City Travel Database – January 2017

INDIA VS. OVERSEAS MARKETS

In **2017** India will:

- Rank **4th** for Visitor Volume (200K)
- CA Market Share: 65%
- Rank **9th** for Visitor Volume Growth (6%)
- Rank **2nd** for Visitor Spending (\$589M)
- Rank **4th** for Visitor Spending Growth (+8.7%)

Visitor Volume & Spending



Source: Tourism Economics- Global City Travel Database – January 2017

GLOBAL MARKETING PROGRAMS

MARKET PRIORITIZATION INPUTS

- Spend
- Visitation
- Spend % Growth
- Visitation % Growth
- Travel Market Size

f o c u s

GLOBAL MARKETING PROGRAMS

MARKET PRIORITIES

Key market priorities – Trade, PR, Consumer Marketing

- United States
- China
- UK
- India

2nd Tier Priority Markets – Trade, PR and special situation consumer marketing

- Australia
- Brazil
- South Korea
- Canada



GLOBAL MARKETING PROGRAMS

MARKET PRIORITIES

Top market priorities for trade and PR

- Mexico
- Germany
- France
- Taiwan
- Japan
- Italy
- Scandinavia





WELCOME CAMPAIGN

TIMELINE OF TRAVEL BAN

- January 27 – President signs executive order
- January 28 – Protests nationwide breakout
- January 29 – Judges in NY, MA temporarily block ban
- February 9 – The ban is defeated
- March 6 – President unveils new travel ban
- March 15 – Second ban is defeated

Damage is already done

WELCOME CAMPAIGN

TRAVEL BAN EFFECT

U.S. bound flight searches are down 17%

The number of flight searches decreased from 61M to 50M

Flight searches dropped in 94 of 122 countries surveyed

Flight searches to San Francisco have declined the most

WELCOME CAMPAIGN

WHAT ARE WE DOING ABOUT IT?

With the board's approval, we've unlocked additional funds to...

Phase 1

- Develop a new video
- Create a dedicated landing page to welcome people

Phase 2

- Develop a photo essay series showing the diverse faces of San Francisco

Phase 3

- Participate in VCA co-op to launch in July





WELCOME CAMPAIGN

WHAT ARE WE DOING ABOUT IT?

Since this ban effects the international visitor, we are going to amplify our welcome message...

- With Facebook ads
- In the UK and Canada
- Matching funds and additional creative from VCA
- Earned media

Launch Date: Targeting May 8

WELCOME CAMPAIGN

BECAUSE SAN FRANCISCO...

...doesn't just **welcome** your differences.

We **encourage** them.

We **celebrate** them.

We even **throw parties** for them

Never the same. Always welcome.

AIR INDIA EXPANDED SERVICE

AIR INDIA – GLOBAL MARKETING PLANS

AIR INDIA SERVICE PROMOTION

- **Partners**
 - SFO
 - Visit CA
- **Channels**
 - Facebook
 - YouTube
 - Hotstar

FLY
NONSTOP
TO SFO



GO TO
SAN
FRANCISCO



EXPERIENCE
YOSEMITE
NATIONAL PARK



CHINA PROGRAMS

SFTRAVEL CHINA CONSUMER PROGRAMS

SF PROGRAMS OVERVIEW

- Ctrip
- Weibo & WeChat
- KOLs
- GoUSA Websites
- Warriors Mission
- Trade & Tour Operator Events
- PR



WARRIORS MISSION

- Mission to leverage Golden State Warriors Oct 2017
- Partner inclusion
- Large delegation including the Mayor
- Top Tour Operators
- Consumer Campaign Before & After Games



Live Streaming Highlights

Live Streaming #1 - Wine Tasting Class



Wine Tasting Lecture



Wine Tasting Grid



Wine Showcase

Live Streaming #2 - Dinner



Wine & Food Pairing Tips



Cuisine Showcase



Wine Showcase

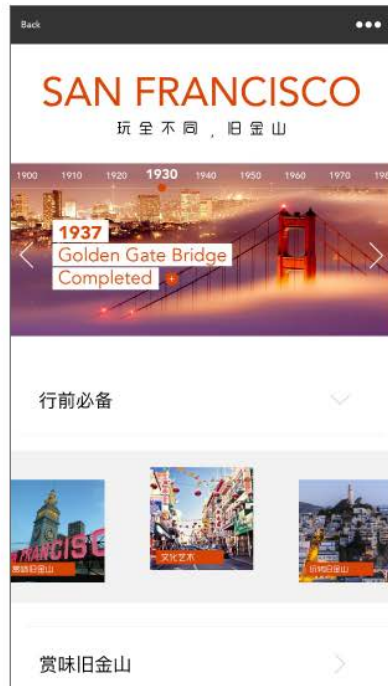
Topline Performance vs. Last Live Streaming

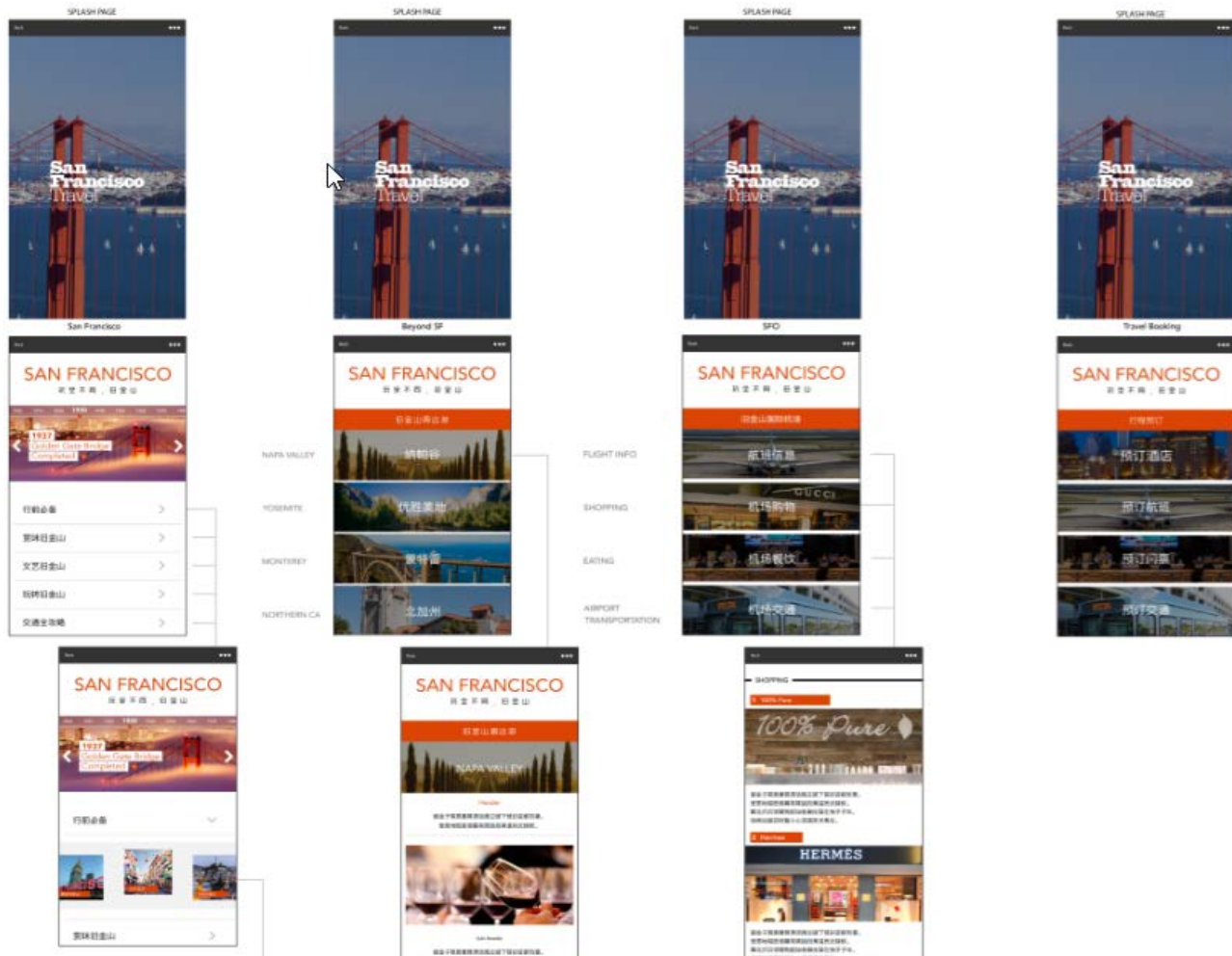
We have noticed a decline in the number of views comparing to last live-stream, however, the number of likes and comments have increased significantly from the December live-stream. Our hypothesis is that Wine tasting is a niche topic compared with SF Christmas. 'Wine tasting' topic requires the viewers to be of a more affluent social status, thus the number of viewers are comparatively lower. We, however, can clearly see those that have tuned in are very intrigued by the topic and engaged with us frequently throughout the live-stream.

	Napa Valley Live Streaming	SF Christmas Live Streaming
On-air Time	2/9/2017 (Thursday)	12/22/2016 (Thursday)
Total Time	129 min	145 min
Views	138,000 ↓ -19%	170,000
Likes	120,280 ↑ +887%	12,190
Comments	200 ↑ +14.3%	175

Data from: 2/9 - 2/13, 2017 Data from: 12/22 - 12/27, 2016

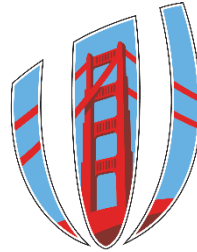
SCREENS







RUGBY WORLD CUP SEVENS 2018



RUGBY
WORLD CUP™
SEVENS
SAN FRANCISCO 2018



GIANTS ENTERPRISES

1ST TIME HOSTING IN USA HISTORY

July 20-22 2018

3 DAYS

40 TEAMS

AT&T PARK



RWC Sevens in San Francisco

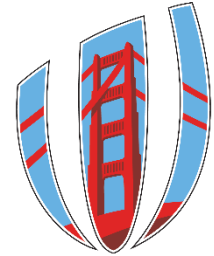
- 40 teams competing from countries all over the world
 - 24 men's & 16 women's teams
- 1st time that men's & women's World Cup will be hosted together
- 12 countries have already prequalified

MEN'S:

Australia	New Zealand
England	South Africa
Fiji	USA
France	Wales

WOMEN'S:

Canada
Spain
New Zealand
USA



RUGBY
WORLD CUP™
SEVENS
SAN FRANCISCO 2018

GET INVOLVED

GET INVOLVED

- Become a Partner
- Join us at trade shows and on missions
- Leverage our marketing coops
- Welcome influencers and media on FAM trips with us
- Attend our events



THANK YOU

TYLERG@SFTRAVEL.COM

