Hotel Council of San Francisco Meeting

August 18, 2020
Caroline Beteta
President & CEO
Visit California
Consumer Sentiment

- Mindset Toward Resuming Activities (SMARInsights)

- Mindset Toward Travel (Destination Analysts)
Mindset Towards Resuming Activities In Next Week

Source: SMARInsights Weekly Travel Insights Study
California Room Demand

<table>
<thead>
<tr>
<th>California</th>
<th>Gateways</th>
<th>Rural Regions</th>
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<tbody>
<tr>
<td>Mar 8 2,001,583</td>
<td>Mar 8 1,254,200</td>
<td>Apr 8 719,149</td>
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<tr>
<td>Mar 22 1,807,630</td>
<td>Mar 22 1,012,464</td>
<td>May 8 602,713</td>
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<tr>
<td>Apr 5 1,606,100</td>
<td>Apr 5 790,079</td>
<td>Jun 8 487,130</td>
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<tr>
<td>Apr 19 1,404,980</td>
<td>Apr 19 585,055</td>
<td>Jul 8 371,646</td>
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<tr>
<td>May 3 1,213,820</td>
<td>May 3 390,020</td>
<td>Aug 8 266,152</td>
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<td>May 17 1,022,700</td>
<td>May 17 195,000</td>
<td>Sep 8 161,658</td>
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<tr>
<td>May 31 831,580</td>
<td>May 31 40,000</td>
<td>Oct 8 76,158</td>
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<td>Jun 14 640,460</td>
<td>Jun 14 10,000</td>
<td>Nov 8 31,158</td>
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<tr>
<td>Jun 28 449,340</td>
<td>Jun 28 0</td>
<td>Dec 8 0</td>
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<td>Jul 12 248,220</td>
<td>Jul 12 0</td>
<td>Jan 9 0</td>
</tr>
<tr>
<td>Jul 26 147,100</td>
<td>Jul 26 0</td>
<td>Feb 9 0</td>
</tr>
<tr>
<td>Aug 9 46,980</td>
<td>Aug 9 0</td>
<td>Mar 9 0</td>
</tr>
</tbody>
</table>

Source: STR
Provide Permission to Travel

Incentivize In-state Travel

Responsible Travel Code Guiding All Stages

Support Small Business

#ShopLoCAL

U.S. TRAVEL ASSOCIATION

visit California
R.E.S.P.E.C.T. California Travel Code
Visit California Pivots & Recovery Plan
Re-O.P.E.N.
Priority Programming
Here's a break in the news, brought to you by Stanlee, Rufaro and friends. They're a colony of African Penguins stationed at the California Academy of Sciences in San Francisco. The Official Guide

CALIFORNIA NOW BLOG / CALIFORNIA LOCAL BUSINESSES FORGE FUN PARTNERSHIPS
California Local Businesses
Forge Fun Partnerships
Small businesses across the state are joining forces to bring you more wine, books, and cool experiences.

Posted 3 months ago
by Kimberly Hunt

San Francisco Sightseeing Tours
When it's time for Bay Area locals or other visitors to go on day trips, seven family-owned San Francisco tour companies are ready. They've joined forces and have established a shared safety protocol to offer guests "touch-free" private tours for 2-8 people. Choose from tour options such as the automated cars of Go Cars, cycling rentals from Blazing Saddles, boat tours of Bay Voyager, and the aerial tours on Seaplane Adventures. Other participants include culinary tour operator Avital Tours, SF Electric Tour Co, and Lucky Tuk Tuk.

CALIFORNIA NOW BLOG / SAN FRANCISCO CELEBRATES FIRST-EVER 415 DAY TO HONOR LOCAL RESTAURANTS
San Francisco Celebrates First-Ever 415 Day To Honor Local Restaurants
Get in on the celebration by enjoying takeout or delivery from some of the Bay Area's best eateries.

Posted 4 months ago
by Kate & Daryl

CALIFORNIA NOW BLOG / SO YOU THINK YOU KNOW SAN FRANCISCO?
So You Think You Know San Francisco?
You've been to Alcatraz, crossed the Golden Gate Bridge, and indulged in a Michelin feast. Now what?

Posted 6 months ago
by Theresa Gonzalez

Add a comment...
Recovery Marketing
Four Wave Integrated Recovery Marketing Strategy

WAVE 1
LOCAL MARKET SUPPORT
Close to Home, California

WAVE 2
IN-STATE MESSAGING
Calling All Californians

WAVE 3
WESTERN REGION DRIVE MARKETS
California Is Calling

WAVE 4
NATIONAL WITH CONTINUED IN-STATE
All Dreams Always Welcome in California
California Stairway to Recovery

Progression or Regression

CLOSE TO HOME CALIFORNIA
CALLING ALL CALIFORNIANS
CALIFORNIA IS CALLING
ALL DREAMS WELCOME IN CALIFORNIA

Daycation
Nearcation
Staycation
Recreation
Western Region
Republic

calling all californians
parents love it (Kidifornia)
California road trip
new creative
all dreams always welcome

WAVE 1
WAVE 2
WAVE 3
WAVE 4
New Strategic Framework

**MESSAGE PROGRESSION**
- Information

**TARGET AUDIENCE**
- Visit California Owned Channel Followers
- California Active Travel Intender Audience
- California Travelers

- People actively engaged with California content
- People actively planning travel lower funnel
- People starting to think about travel at a future point in time
Wave 1: Local Market
“See You Soon”
‘See You Soon’
Digital Videos

Hey!
Been wayyyyy too long, huh?
Like, Golden Gate Bridge long.

Hey stranger!
Remember those long summer days at the beach?
THE. BEST.

Looking forward to when we can get sandy again. 🌞🏖️😊

See u soon,
~ California

BTW, I still have your flip flops. LOL
CALLING ALL CALIFORNIANS

ROAD TRIP REPUBLIC™
Creative Execution

Tier 1 Markets: Los Angeles, Sacramento, San Diego, San Francisco
Industry Communications

- industry.VisitCalifornia.com/Coronavirus
- Weekly Industry Emails