The San Diego Tourism Marketing District develops and supports economic growth through tourism promotion to stimulate hotel room nights in the City of San Diego.

PURPOSE

The San Diego Tourism Marketing District (SDTMD) provides a private, nonprofit funding vehicle to stimulate hotel room demand through tourism promotion, marketing and advertising programs.

The judicious allocation of these resources creates a positive economic, fiscal and employment impact on lodging businesses in the City of San Diego.
A robust lodging business in San Diego is fundamental to a thriving tourism industry in the region.

Because of the persistence of our board, our partners, and the San Diego City Council, the San Diego Tourism Marketing District (SDTMD) made a challenging year a success. The SDTMD is a non-profit mutual benefit corporation designed to increase the number of visitors who stay in San Diego lodging businesses. The district is funded by hoteliers who assess their properties based on the number of guest rooms. The assessments are collected by the City of San Diego and disbursed to the SDTMD to promote local tourism through marketing and advertising.

The challenge we faced this year began with little warning in early 2013 when the newly-elected (now former) mayor of San Diego objected to the SDTMD’s funding model. He blocked the implementation of the SDTMD renewal agreement, which had been approved by the City Council just before he took office. This led to funds being sequestered by the City and a partial interruption of our Fiscal Year (FY) 2014 program. Patience in seeking a beneficial solution for the City and our hotels paid off. As we worked with the City staff and the Council on the issue, the Mayor was forced to resign after nine months in office.

Through the political transition, the SDTMD continued to work with Interim Mayor Todd Gloria, Acting City Council President Sherri Lightner, and the City Council, which approved a second amendment to our operating agreement and ended the months-long impasse in November 2013. The action allowed the SDTMD to once again fund vital marketing and advertising programs beginning in January 2014.

This annual report looks at an eighteen-month time frame due to the interruption in our funding in early 2013. The assessments being collected were not released until January 2014. Because of the delay, the SDTMD was unable to contract with any independent event-based organizations in FY 2014. The San Diego Tourism Authority, the sales and marketing agency for the destination, was the only organization to deploy TMD funds into the marketplace in FY 2014.

Once the political hurdle was cleared, the SDTMD wasted no time in working with newly-elected Mayor Kevin Faulconer and our partners to ensure that SDTMD rooms were booked, San Diego was once again marketed far and wide and tourism continued to thrive in the region.
A robust lodging business in San Diego is fundamental to a thriving tourism industry in the region. This fact proved true when the SDTMD was unable to fully fund the tourism authority and market significant events due to the legal argument with the former mayor. The result for the region was a minor increase in the number of tourists and booked hotel rooms, while our competitors’ numbers grew at a markedly greater rate.

It has taken almost a year to rebuild our momentum and become once again the thriving district that contributes to San Diego’s stellar reputation with state, national and international visitors. As soon as the SDTMD funding was released in January of 2014, the San Diego Tourism Authority launched a multimillion dollar advertising campaign, which in part led to an increase in the number of visitors booking TMD hotel rooms, and the amount collected by the City of San Diego for the Transient Occupancy Tax (TOT.) Now the SDTMD looks forward to the programs it has funded from the highly-competitive process for the FY 2015 marketing contracts.

Yet even as we anticipate the success of our partners, we are mindful of and continue to defend ourselves against the lawsuits and political opposition that have challenged the validity of the SDTMD’s funding. We believe hoteliers have the right to self-assessment and have the city collect the funds that benefit SDTMD hotels. In the meantime, we invite you to take part in the events we support as they are just a microcosm of what makes San Diego special, one of the world’s best places to visit…and stay.

C. Terry Brown
Chairman

Lorin Stewart
Executive Director
SDTMD GOALS

FUEL DESTINATION MARKETING

INCREASE hotel room night occupancy

COLLECT approximately $30 million in assessments annually

ATTRACT tourism activity
COMPETE aggressively with major travel markets

OUTPERFORM competitive markets

DELIVER $10.5 million in Transient Occupancy Tax annual savings to the City of San Diego General Fund (Total: $63 million over six years)
In 2014 San Diego continued to shine brightly for visitors enamored by the region’s coastal and outdoor lifestyles. The San Diego Tourism Marketing District is the agency that provides stable funding for tourism. The San Diego Tourism Authority was the only organization to deploy TMD funds into the marketplace in FY 2014 due to the months it took to work out the district’s operating agreement with the City of San Diego. With that challenge and its lingering market effects behind us, the SDTMD board opened up the funding competition for FY 2015 and are excited by the variety of programs that were presented, which will increase room stays for San Diego’s lodging industry.

The SDTMD Board is confident that the last five years of experience running the program has paid off and is one of the key reasons that the region’s advertising and marketing programs are so successful.

The numbers are impressive and something we believe will continue over the next few years. From January 2008 through FY 2014, the SDTMD awarded more than 85 separate contracts worth approximately $136 million. For the assessed lodging properties, this supported the production of over 20.1 million incremental room nights valued at $2.87 billion in revenue.

The district provides a reliable financial platform for the promotion of San Diego tourism for the benefit of its assessed lodging properties. The programs we fund fuel destination marketing.

Organizers of large-scale events and the San Diego Tourism Authority can count on annual financial support if their activities put people in our hotels and have an excellent return on investment. This kind of consistency is integral to increasing our market share in the highly-competitive tourism industry.

We must get to the people who are sitting on the fence about where to vacation. Change their minds and we score big for San Diego businesses. That’s the value of the San Diego Tourism Marketing District.

San Diego City Council President Todd Gloria
San Francisco, Los Angeles, Phoenix, Las Vegas and New York City among others are competing for the same domestic and international travel market as San Diego. While our region is blessed with mountains, deserts, bays, and beaches, the SDTMD knows that silence is not golden when it comes to tourism. To influence tourism, marketing is “an essential variable to compete effectively in a competitive market.”¹ Without it, San Diego could be out of sight and out of mind. That is why the SDTMD is a vital economic engine for our City. Through its programs, the SDTMD helps generate and annually increase the amount of sales and Transient Occupancy Tax (TOT) revenues that go to the City of San Diego.

A case in point is the months that the SDTMD funds were restricted and the TOT revenues only grew by 3.6 percent annualized, well below projections. Since January 2014, when the funds and activities were restored, the annualized TOT revenues have grown by 8.8 percent, well above the City’s projections.

MARCH
FY2009 ROI audits completed

OCTOBER 2010 TO FEBRUARY 2011
Public Presentation of FY2011 Applications

FEBRUARY 18
FY2011 TMD Funding Recommendations made by SDTMD Board

JUNE 21
FY2011 TMD Funding Recommendations approved by City Council

JULY 1
FY2011 starts

JANUARY
Collection of assessments begins on January 1, 2008

APRIL
SDTMD is approved for a five-year contract with the City of San Diego

APRIL
SDTMD Board constituted and first Board meeting held

JULY
Programs implemented

DECEMBER
Hotels vote to participate in a tourism marketing district

APRIL
Studies show market share up

JUNE
FY2010 budget approved
The SDTMD is the funding conduit for our contracted partners who, through a rigorous application process, demonstrate a proven ability to develop and implement effective sales and marketing programs while driving visitors into area hotels. Over the last five years the process has been extremely successful, supporting the production of more than 20.1 million hotel room bookings. In turn, those bookings generated more assessment dollars for the SDTMD and more TOT revenues for the City of San Diego. The SDTMD plays a crucial role in generating hotel revenues.

At no time was this more evident than during the 2013 disruption in the SDTMD process, caused by a dispute with a former mayor. But the delay had a “hard-earned” silver lining. Through it we were able to measure the value of a marketing campaign and event promotion. Take money out of the marketplace and economic impacts go down, put promotion money back into the marketplace and the percentage goes up significantly.

When the money was restricted, the TOT increased by only 3%. When the money was freed up, it increased to 9%.

While funds were restricted, we watched the number of people at area hotels drop below projections and the percent change in the TOT tax also decreased below projections.

In the first 18 month of the new district, the SDTMD contracted for $22,463,168. The San Diego Tourism Authority, the sales and marketing agency for the destination, was the only organization to deploy TMD funds into the marketplace in FY2014.
This chart captures the amount of TOT during the time when the funds were restricted: January 2013 – August 2013.
TOURISM ECONOMIC IMPACT

2013 TOTAL ECONOMIC IMPACT

$2.1 TRILLION

$133.9 BILLION
2013 TRAVEL-GENERATED TAX REVENUE:

$887.9 BILLION
IN DIRECT TRAVEL EXPENDITURES

IN 2013 THE T&T INDUSTRY SUPPORTED
14.9 MILLION JOBS

IN 2013, THE T&T INDUSTRY GENERATED
$209.5 BILLION
IN TRAVEL-GENERATED PAYROLL

TOTAL DIRECT TRAVEL EXPENDITURES FOR 2013 AVERAGED
$2.4 BILLION/DAY; $101.4 MILLION/HOUR;
$1.7 MILLION/MINUTE; AND $28,154/SECOND

$110.8 BILLION 2013 TOTAL ECONOMIC IMPACT TO CALIFORNIA

242.8 MILLION VISITORS TO CALIFORNIA

$110.8 BILLION
IN DIRECT TRAVEL EXPENDITURES

$16.3 BILLION
2013 TRAVEL-GENERATED TAX REVENUE

IN 2013, THE T&T INDUSTRY SUPPORTED
965,800 JOBS

IN 2013, THE T&T INDUSTRY GENERATED
$34.1 BILLION
IN TRAVEL-GENERATED PAYROLL

TOTAL DIRECT TRAVEL EXPENDITURES FOR 2013 AVERAGED
$303.5 MILLION/DAY; $12.6 MILLION/HOUR;
$210,806/MINUTE; AND $3,513/SECOND
I knew the San Diego City Council had to get the San Diego Tourism Marketing District functioning as quickly as possible after the long delay. The lack of tourism promotion was directly related to the drop in TOT revenues. Now we’re back in the market telling our story to future visitors worldwide.

San Diego City Councilmember Sherri Lightner
Tourism is one of the largest and most competitive industries in the world.

The performance of the hotel sector in the City of San Diego is instrumental to the health of the local businesses and jobs supported by the tourism industry. Stagnant growth in rooms booked can mean less sales and TOT revenues for city coffers. As an example, experts point to the dramatic loss of tourism-related revenue that occurred in Colorado in the mid-1990s when the state eliminated tourism promotion. In one year, Colorado slipped from first to seventeenth place in the summer resort category. Its share of the U.S. leisure travel market plummeted by 30%. Visitor spending fell and created an immediate loss of total revenues of $1.4 billion, which increased to $2.4 billion annually by the late 1990s.

A microcosm of that situation occurred in San Diego. SDTMD funding was held back by a legal disagreement, and the funds were not released until a compromise was approved by the City Council in late 2013. Because of the delay, the SDTMD cancelled the application process for FY 2014, and the San Diego Tourism Authority, the sales and marketing agency for the destination, was the only organization to deploy TMD funds into the marketplace.

In January 2013, the funding was released and the SDTA immediately went into the market with an advertisement that reached 43 million viewers of the National Football League playoff game featuring the San Diego Chargers and the Denver Broncos. After a year delay, we were back in business.

Stepping out of the market for one year created an impact. While our competitors experienced growth, San Diego’s hotel performance lagged.
TMD Meeting & Group Sales/Consumer Direct Sales & Marketing
Payer Universe = Lodging businesses in City of SD with 30 rooms or more
Assessment @ 1.45%*

Destination Marketing with Specific Call to Action for TMD Lodging Businesses
Payer Universe = All Lodging Businesses in City of SD
Assessment @ 0.55%*

* * All TMD lodging businesses of 30 or more rooms pay Categories A + B for total assessment of 2%
As Mayor, I’m proud to partner with our Tourism Marketing District to create more opportunities for San Diego families, workers and visitors. Together, we will continue to transform neighborhoods, reinvigorate our economy, and showcase our beautiful and innovative city to the world. Thank you for your continued support and contributions, which makes so much possible.

Mayor Kevin Faulconer

San Diego Projected Growth (RevPAR) vs. Actual Performance for San Diego & Comp Sets

The renewal of the new district in 2013 began a new chapter for the SDTMD. The first five years were a success, recognized by the San Diego City Council in late 2012 when it unanimously agreed to renew the district for 39.5 years and approved the new district’s first five-year operating plan.

When the legal dispute with the former mayor arose, the SDTMD was forced to drastically reduce its funding program throughout 2013… This resulted in losing approximately 50% of our projected growth in marketshare.
With our new operating agreement in place and our partners primed to market San Diego around the world, SDTMD is confident that this year’s challenges will lead to great successes in the coming fiscal year.
San Diego Tourism Authority (SDTA)

As the SDTMD’s only contractor to deploy TMD funds in FY 2014, the SDTA immediately took advantage of the opportunity to market San Diego to more than 43 million viewers of the San Diego Chargers versus the Denver Broncos NFL playoff game in January 2014. The SDTA announced that they were back in business and revved their engines as they sped into service with a marketing and advertising campaign that kicked into high gear in February 2014. The SDTA pushed their advertisement and promotions campaigns, tracked and monitored visitor volume; and participated in a variety of travel trade events in order to tout San Diego. Its strategic focus brought in millions of visitors who booked hotel rooms and contributed to San Diego’s tourism occupancy revenues.

SDTA AND HOTEL PERFORMANCE
In the combined months, SDTA was responsible for supporting the production of 4,524,606 room nights and $692,849,598 in room night revenues.

<table>
<thead>
<tr>
<th>34:1</th>
<th>Total FY2013 Return on Investment</th>
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<tbody>
<tr>
<td>FY2014 Funding Amount</td>
<td>$22,179,760</td>
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<tr>
<td>Hotel Room Nights</td>
<td>5,068,332</td>
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<tr>
<td>x Average Daily Rate: ADR</td>
<td>$150.67</td>
</tr>
<tr>
<td>Total Room Night Revenue</td>
<td>$763,664,348</td>
</tr>
</tbody>
</table>

When tracking online travel agency reporting for SDTMD district properties only, the SDTA reported over the same time period bookings for 1,391,711 rooms with an average daily rate of $150.53. The total revenue for the number of rooms booked was $209,499,997.

The SDTA commissioned a Quarterly Travel Forecast from Tourism Economics, an Oxford Economics Company, based on data from 2013 and FY 2014 that compiled possible new hotel openings in order to increase the hotel room supply in San Diego. By June 2016, the region could have as many as 1,261 new rooms in the City of San Diego.
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According to the report, San Diego maintained its premium occupancy rates and prices but the margins narrowed. However, through April 2014 the ADR and RevPAR beat the state and national performance. Hotel room demand continued to climb slowly.

### SAN DIEGO HOTEL PROJECT PIPELINE

#### 2015 Projected 4-5 Star Hotels

<table>
<thead>
<tr>
<th>Hotel Name</th>
<th>Address</th>
<th>City</th>
<th>Zip</th>
<th>Potential Open Date</th>
<th>Number of Rooms</th>
<th>Potentiality Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday Inn - Mission Valley</td>
<td>625 Hotel Circle South</td>
<td>San Diego</td>
<td>92108</td>
<td>Mar-15</td>
<td>87</td>
<td>5</td>
</tr>
<tr>
<td>Courtyard by Marriott</td>
<td>453 6th Avenue</td>
<td>San Diego</td>
<td>92101</td>
<td>Jul-15</td>
<td>90</td>
<td>5</td>
</tr>
<tr>
<td>Homewood Suites &amp; Hilton Garden Inn</td>
<td>2137 Pacific Highway</td>
<td>San Diego</td>
<td>92101</td>
<td>Jul-15</td>
<td>364</td>
<td>5</td>
</tr>
</tbody>
</table>

**TOTAL** 541

#### 2016 Projected 4-5 Star Hotels

<table>
<thead>
<tr>
<th>Hotel Name</th>
<th>Address</th>
<th>City</th>
<th>Zip</th>
<th>Potential Open Date</th>
<th>Number of Rooms</th>
<th>Potentiality Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lane Field North - Spring Hill Suites</td>
<td>Harbor Drive</td>
<td>San Diego</td>
<td>92101</td>
<td>Apr-16</td>
<td>253</td>
<td>5</td>
</tr>
<tr>
<td>Lane Field North - Residence Inn</td>
<td>Harbor Drive</td>
<td>San Diego</td>
<td>92101</td>
<td>Apr-16</td>
<td>147</td>
<td>5</td>
</tr>
<tr>
<td>Gaslamp Project - 4-Star to be named</td>
<td>J Street</td>
<td>San Diego</td>
<td>92101</td>
<td>Jun-16</td>
<td>320</td>
<td>5</td>
</tr>
</tbody>
</table>

**TOTAL** 720
Board of Directors

C. Terry Brown, Chairman
President, Atlas Hotels

Richard Bartell, Vice Chairman
President, Bartell Hotels

William L. Evans, Treasurer
Partner, Evans Hotels

John Schafer, Secretary
Vice President and Managing Director, Manchester Grand Hyatt San Diego

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Jody Blackinton
Regional Director, HHM Hospitality

Matt Greene
Vice President of Operations, Evolution Hospitality

Keri A. Robinson
Area Managing Director, Starwood Hotels & Resorts – San Diego Weston Gaslamp Quarter Downtown

Thomas J. Voss
President, The Grand Del Mar Resort & Spa

Lorin Stewart
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