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October 31, 2013

Mr. Jim Farley, Director
Department of Cultural and Visitor Services
County of Marin
20 Avenue of the Flags
San Rafael, CA 94903

Dear Jim:

We are submitting our 2013/2014 Marin Convention & Visitors Bureau Program of Work for your review. Included in this information are highlights YTD as well as goals and objectives for 2014.

The 2013 travel season in Marin County has increased by approximately seven percent compared to 2012, thanks to favorable economic conditions and upsurge in the travel activity market, and a strong promotional presence by The Marin Convention & Visitors Bureau to attract potential visitors to the area.

The Marin Convention & Visitors Bureau appreciates your support as well as the Marin County Board of Supervisors and the staff at the Marin Civic Center. We enjoy working on collaborative projects and look forward to continuing this partnership as we move forward.

Yours truly,

Mark L. Essman
President/CEO
Marin Convention & Visitors Bureau
OVERVIEW

In May of 2004, the Marin County Visitors Bureau (MCVB) was created out of a one percent self-assessment of lodging properties within the Marin County Business Improvement District (BID). The MCVB represents seven communities, and various members of the West Marin Visitors Bureau, totaling 44 lodging properties, and 2,300 guest rooms.

MISSION STATEMENT

To develop a sustainable visitor base to Marin County, enhance the local economies, and protect the natural resources through responsible promotion.

POSITIONING STATEMENT

Marin County is ideally located in the North Bay Area directly between San Francisco and the world famous wine regions of Sonoma County and the Napa Valley.

Offering an affordable alternative to the city of San Francisco, yet only 30 minutes from the Wine Country, Marin County offers a central vantage point from which visitors can explore the entire San Francisco Bay Area as well as discover the natural beauty this diverse region provides.

Marin County has over 70 miles of ocean coastline and 40 miles of bay shoreline. Eighty percent of Marin County’s land is unincorporated, dedicated to park land, open space, and agricultural land. This open space provides visitors with outstanding recreational opportunities such as hiking, mountain and road biking, golfing, fishing, sailing, and even bird and whale watching.

An area as diverse as its natural landscape, Marin County offers the visitor world-class arts and cultural events, unique shopping and dining experiences, all in a centralized location in the greater bay area.
DESCRIPTIVE BRANDING STATEMENT

“Marin, just a little out there.”

DEFINITIVE BRANDING ANTHEM

It’s different here. And not by accident.

Marin County is just a little out there. As in, one famous bridge away from San Francisco. And right next door to the vineyards of Napa and Sonoma. Closer than you could ever imagine to everything that’s unique in this clever corner of California.

There’s hang gliding and kayaking. Fresh, sustainable agriculture. The pinnacle of luxury and the world’s finest wines. All here in this special place. The home of holistic artists and goat cheese artisans. The birthplace of mountain biking and Obi Wan Kenobi. The natural habitat of those grateful for nature and of the Grateful Dead.

Samples of Brand Tag Lines:

• Welcome to the sunny side of the Golden Gate Bridge
• Exactly what a vacation should feel like
• Don’t just get away from it all.
• Find something better... 
• Where nature goes to relax...

The Marin Convention & Visitors Bureau promotes the Marin brand in a variety of on-going marketing programs to promote the uniqueness, sustainability, natural beauty, and accessibility of Marin County to visitors and international guests. In addition the MCVB also works as a local resource for visitor information throughout the region.
2013 ~ Marin County Experiences an Increase in Visitor Travel Thanks to Strong Market Conditions

YTD travel and visitor spending to Marin County have increased by more than seven percent compared to 2012. Thanks to a steady stream of large weekly events in the Bay Area, including the summer-long Americas Cup races, travellers have had the opportunity to make repeat visits to the area engaging in different activities each time they visit Marin County. The Marin Convention & Visitors Bureau designed a customized public transportation map, merging various transportation authority schedules into one easy to read pamphlet designed to guide visitors from San Francisco into Marin County utilizing public transportation.

The Marin Convention & Visitors Bureau continues to increase Marin County exposure utilizing all forms of promotional technology with special emphasis on social media venues. The modern traveler to the area takes advantage of this technology to enjoy Marin County multiple times over the course of the year with repeat visits ranging from one to three days. Social media enables real-time promotion allowing destinations such as Marin to offer current deals and promotional opportunities. Social media attracts visitors as well as giving them a chance to take advantage of the deals and specials offered by local area lodging associations.

2014 travel data suggests that visitation to the greater bay area will continue to increase by five or more percent thanks again to a busy event and conference schedule based out of the San Francisco bay area. Even though these events are located in San Francisco, Marin continues to feel an overflow or compression from visitors who would prefer to stay in Marin County to take advantage of it’s centralized location and unique attractions verses San Francisco.

One of the objectives for 2014 is to sponsor an event management software program to be utilized by both the MCVB and the Marin Center in order to increase booking and scheduling effectiveness. The software program will also offer an exchange of information so that both organizations can work corroboratively to promote Marin County.
2013 ~ Year-To-Date Highlights

2012 Fourth Quarter Ending December 31st
- Began design work on updating Marin County state display case
- Hosted Fifth Annual press and meeting planner FAM Tour
- Attended International Tradeshow IMEX America, Las Vegas, NV; Green Meetings Industry Council Northern California APEX training session, San Francisco, CA; Global Annual Conference, Chicago IL; SalesForce annual DreamForce Convention, San Francisco, CA
- Exhibited at the CalSAE Seasonal Spectacular Tradeshow, Sacramento, CA
- Sponsored and attended the California On Locations Awards, Pasadena, CA
- Worked with the Marin Center to host hoteliers with a site tour of the Marin Center
- Launched MCVB’s Fall Sweepstakes Contest
- Began planning for the 2013 CA Restaurant month promotion
- Began planning for 2013 Marin County commercial with Atomic Productions
- Started development on a complete restructuring of visitMarin.org
- Developed a task force committee with Marin Chamber of Commerce to discuss America’s Cup
- Renewed membership with North Coast Tourism Council to promote the Redwood Empire
- Collaborated with a variety of national travel writers representing NYTimes, USA Today, and VisitCalifornia to provide content articles on Marin County
- Launched “Tourism Matters” sticker program for restaurants and partners

2013 First Quarter Ending March 31st
- Began actual commercial production on Marin Travel Commercial
- Purchased a new interactive software program for customized visitor inquiries
- Participated in Go West Summit appointment tradeshow, Ft Worth, TX
- Attended GMIC Global Conference, Chicago, IL
- Exhibited at the Meeting Planners International Sacramento Sierra Nevada Chapter Tradeshow, Sacramento, CA; MPINCC Annual Expo and Exposition, San Francisco, CA; SGMP Joint Conference and Tradeshow, Sacramento, CA; California Locations Conference and Tradeshow, Santa Monica, CA
- Began design work on the America’s Cup Transit brochure
- Completed new Sales Kit for trade shows
- Added new branding anthems to inventory for Marin County
- Revamped and printed fourth edition of Visitor Guide
- Implemented new website design work for visitmarin.org
- Instigated planning for the Second Annual culinary farm tour
- Hosted Marin’s third annual CA Restaurant Month in collaboration with VisitCalifornia
- Hosted the first SGMP board retreat in Marin County
- Staged and produced high-resolution images for branding ads
2013 ~ Year-To-Date Highlights (Continued)

2013 Second Quarter ending June 30th
• Completed design and installation of the state capital’s display for Marin County
• Created Marin County Poster at request of Assembly Member Mark Levine’s office
• Started onsite production within various Marin communities for MCVB commercial
• Hosted Second Annual Culinary Farm Tour; GM Sales Reception Mixer; and GMIC Global Board Retreat
• Began discussion with Marin based travel blogger to promote Marin County in a series of monthly features on visitmarin.org
• Participated in USTA IPW appointment tradeshow, Las Vegas, NV;
• Exhibited at the Association of Film Locations International Tradeshow in Los Angeles, CA
• MCVB became recertified as a green business
• The new redesigned visitMarin.org website goes live
• Printed and distributed 2,000 America’s Cup Transit map

2013 Third Quarter Ending September 30th
• Launched the MCVB virtual Visitors Guide online
• Activated the iMap software program on visitMarin.org
• Began collaboration with Motor Trend magazine to feature a travel segment on Marin County
• Confirmed contract with PBS for a Martin Sheen narrated Travel documentary on Marin County
• Launched MCVB’s blog/social media page on visitMarin.org
• Began planning 2014 Green Tourism Summit
• Began discussions with Marin Civic Center on a shared booking software program
• Attended the USTA ESTO Conference, Richmond, VA; MPI WEC (World Education Conference), Las Vegas, NV; Oracle World, San Francisco, CA
• Began participation in GMIC Annual Global Conference in San Francisco, CA
• Revamped E-newsletter with Exact Target to match new website branding
• Added Pinterest and Instagram as social medial components to visitMarin.org
• Hosted FAM Tour for Norwegian tour operators
• Completed production on MCVB’s TV commercial with Atomic Production
• Added more high-resolution photos to MCVB’s inventory
• Completed MCVB and event sustainability policies
Marin CVB Event Sustainability Policy

Vision

The Marin CVB commits to develop a sustainable visitor base to Marin County, enhance the local economies, and protect the natural resources through responsible promotion. The Marin CVB commits to operations, which reduce our environmental impact, focus on conserving resources and utilizing products, technologies, and methods, which continually improve in these efforts.

Principles

Our approach to sustainable principles focus in the areas of: Leadership, Transparency, Integrity and Continuous Improvement. We believe we have the power to make a positive human impact on the diverse people we touch.

Important Issues

Our business faces many challenges and opportunities. Due to their direct impact on us and to their direct impact on our stakeholders we have prioritized the following issues that need to be addressed:

1. Waste Management: Reduction

A comprehensive plan provided to identify, reduce, and divert various waste streams created by operations, attendees and clients. Components of this plan include a facility waste audit, as well as methods to reduce the amount of waste being created, manage inevitable waste, and divert waste from landfill by means of reuse, repurposing, recycling and composting. No plastic bottles policy for all events.

2. Energy Conservation

Best practices to optimize efficiency in energy consumption by staff in regards to office equipment, lighting and heating/air-conditioning energy management.

3. Water Conservation

Best practices regarding water quality and conservation methods including chemical management and building infrastructures (toilets, sinks, and dishwasher) efficiencies.

4. Air Quality

Improve air quality within venue and surrounding areas. Areas of focus include anti-idling policy and enforcement, smoking policies, alternative transportation, carpooling, and management of VOC’s and hazardous air pollutants.

5. Environmental

Address environmental and ethical impacts. This includes a focus on regional, organic, and sustainable materials as well as vendors who consider their environmental impact and support the mission of the Marin CVB.

Mark Essman, CEO & President

Date
2014 OBJECTIVES

It is the mission of the Marin County Visitors Bureau to develop a sustainable visitor base to Marin County and enhance the local economies while protecting our natural resources through responsible promotion.

Objectives, Strategies and Implementations

1. Objective ~ Continue to increase lodging occupancy and visitor awareness for Marin County

Strategy:

- Direct all inquiries and visitor traffic through website whenever possible
- Maintain ongoing updates and enhancements of visitMarin.org to provide current real-time information to visitors
- Continue to enhance the functionality of visitMarin.org by increasing the mobile applications for smart phone and tablets as well as a mobile booking widget
- Expand social media activities and channels to include two additional Marin Sweepstakes travel contests for 2013
- Leverage various social media platforms including Instagram, Pintrest, and Google+ to increase website traffic
- Add another International Facebook page to increase Marin County exposure to international visitors
- Utilize two to four travel writers/bloggers on a monthly basis to generate story information on Marin County to potential visitors
- Position completed video segments including broadcast quality TV commercial, Motor Trend Epic Drive YouTube series, and PBS travel documentary to enhance exposure for Marin County
- Continue to increase iMap software database on Marin County to allow potential visitors to develop customized travel itineraries
- Target culinary Farm-to-Table/Agri-tourism events in Marin County to food related travelers

2. Objective ~ Continue to provide ongoing support to current green certified lodging members to maintain their compliance as well as working with non-compliant members to achieve a green business certification

Strategy:

- MCVB continues to partner with Green Meeting Industry Council (GMIC) to develop and research sound sustainable policies for both lodging and non-lodging members
- Utilize the existing MCVB Sustainability Event Policy for all MCVB-related meetings and events
- Leverage the annual tourism summit in 2014 as a platform to promote industry-green opportunities for Marin businesses
Objectives, Strategies and Implementations (Continued)

Strategy for Objective #2 (continued):

- Expand the MCVB green website page to include more resource information and policy standards to assist members
- Continue to work with the County of Marin and Marin Sanitary Service on cross-promotional green certification programs

3. Objective ~ Research and develop a comprehensive demographic profile of visitors to Marin County

Strategy:

- Identify existing databases of travel information within the region
- Develop supporting methods of surveying and tracking visitors to Marin County
- Work with established demographic marketing companies to acquire travel-related demographic information on Marin County
- Reach out to regional visitor bureaus for best practices and examples
- Utilize captured information and promotional marketing programs to target specific visitors to Marin County

4. Objective ~ Begin a complete re-design of a new all-encompassing travel guide for Marin County

Strategy:

- Place an emphasis on developing a versatile, user-friendly directory, both hard copy and digital for visitors and residents that provides up to date information and opportunities within the area
- Establish a baseline of information on visitor related activities that can be easily accessible to travelers seeking deals on activities and lodging within Marin County
- Distribute finalized information within the Greater Bay Area as well as internationally through social media channels
- Develop resources within the guide that will promote responsible tourism, traffic mitigation, and public transportation opportunities for visitors to decrease congestion and minimize local environmental impacts
- Standardize a format that allows the guide to be utilized in all forms of digital applications (apps)
Financial Summary

The operations of the Marin Convention & Visitors Bureau (MCVB) are based on a calendar year, January 1st to December 31st.

The County of Marin collects the self-assessments from the participating BID communities on behalf of the Marin Tourism BID. Once the monies are collected by the County they are then distributed quarterly to the MCVB. The timeline for collection, submission, and distribution of funds by the County may include a waiting period. Subsequently, the collections the MCVB receives are from the previous quarter.

Thus, the yearly financial information contained within this report reflects income received from the 4th Quarter of 2012, 1st , 2nd and 3rd Quarters of 2013.

The MCVB contract with the County Board of Supervisors requires that we submit our annual report to them by November. Therefore the report reflects the time period of December 31st, 4th Quarter of 2012 to September 30, 2013.
## Marin Convention & Visitors Bureau
### Balance Sheet
**As of September 30, 2013**

**ASSETS**

**Current Assets**
- Checking/Savings
  - 1000 · Bank
    - 1001 · Membership Checking: 54,655.79
    - 1002 · Membership Savings: 62,815.28
    - 1004 · Operations Reserve Acct: 489,577.86
    - 1005 · Petty Cash: 200.00
    - 1007 · Cash Drawer Visitors Center: 100.00
    - 1008 · Operation BID Checking: 42,587.40
  - Total 1000 · Bank: 649,936.33
- Total Checking/Savings: 649,936.33
- Accounts Receivable
  - 1110 · Accounts receivable: 150.00
- Total Accounts Receivable: 150.00
- Other Current Assets
  - 1150 · Inventory West Marin: 2,743.02
  - 1200 · Office Security Deposit: 3,400.00
  - 1220 · Security Deposit - Visitors Ctr: 1,500.00
- Total Other Current Assets: 7,643.02
- Total Current Assets: 657,729.35

**Fixed Assets**
- 1051 · Computer Systems
  - 1052 · Accum Deprec. - Computers: -12,992.15
  - 1051 · Computer Systems - Other: 20,968.65
- Total 1051 · Computer Systems: 7,976.50
- 1055 · Furniture & Fixtures
  - 1056 · Accum Depreciation - F & F: -12,299.98
  - 1055 · Furniture & Fixtures - Other: 12,299.98
- Total 1055 · Furniture & Fixtures: 0.00
- 1058 · Company Sign
  - 1059 · Accum Deprec. - Co. Sign: -7,227.76
  - 1058 · Company Sign - Other: 9,332.03
- Total 1058 · Company Sign: 2,104.27
- 1060 · Sign for West Marin Center
  - 1061 · Accum Deprec. for WM Sign: -914.28
  - 1060 · Sign for West Marin Center - Other: 3,200.00
- Total 1060 · Sign for West Marin Center: 2,285.72
- 1064 · Equipment
  - 1065 · Accum Deprec. - Equipment: -3,920.67
  - 1066 · Telephone Equipment: 5,173.96
  - 1067 · Camera: 1,574.99
- Total 1064 · Equipment: 2,828.28
- Total Fixed Assets: 15,194.77
- **TOTAL ASSETS**: 672,924.12
Marin Convention & Visitors Bureau
Balance Sheet
As of September 30, 2013

Continued from previous page

<table>
<thead>
<tr>
<th>LIABILITIES &amp; EQUITY</th>
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<td>Liabilities</td>
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<td>Current Liabilities</td>
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<td>Other Current Liabilities</td>
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<td>2100 · Payroll Liabilities</td>
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<td>2103 · Vacation Payable</td>
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<td>2100 · Payroll Liabilities - Other</td>
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<td>Total 2100 · Payroll Liabilities</td>
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<td>2118 · Sales Tax Due</td>
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<td>Total Current Liabilities</td>
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<td>Total Liabilities</td>
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| Equity                                    |                  |
| 3001 · Opening Bal Equity                | 1,045.47         |
| 3010 · Unrestrict (retained earnings)    | 516,849.67       |
| Net Income                                | 120,806.46       |
| Total Equity                              | 638,701.60       |

TOTAL LIABILITIES & EQUITY                   | 672,924.12       |
## Profit & Loss Budget Performance

**September 2013**

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<tr>
<th>Actual</th>
<th>Sep 13 Sep 13</th>
<th>Sep Budget Var.</th>
<th>Annual Budget</th>
<th>Sep 13 Jan - Sep 13</th>
<th>Jan-Sep Budget Var.</th>
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<td><strong>Ordinary Income/Expense</strong></td>
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<td><strong>Income</strong></td>
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<td>BID Revenue (Quarterly)</td>
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<td>$0.00</td>
<td>$84,882.60</td>
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<td>WMVB Monthly BID</td>
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<td><strong>Cost of Goods Sold</strong></td>
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<td><strong>Cost of Goods Sold</strong></td>
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<td>$166.00</td>
<td>$151.00</td>
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<td><strong>Total COGS</strong></td>
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<td>$3,126.10</td>
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<td><strong>Gross Profit</strong></td>
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<td><strong>Expense</strong></td>
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<tr>
<td>General &amp; Administration</td>
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<td>Direct Promotions</td>
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<td><strong>Net Ordinary Income</strong></td>
<td>$-87,311.73</td>
<td>$-79,766.43</td>
<td>$-7,545.30</td>
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<td><strong>Other Income/Expense</strong></td>
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<tr>
<td><strong>Other Income</strong></td>
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<td>$118.00</td>
<td>$114.05</td>
<td>$121.45</td>
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<td><strong>Total Other Income</strong></td>
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<td>$118.00</td>
<td>$114.05</td>
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<td><strong>Other Expense</strong></td>
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<tr>
<td><strong>Total Other Expense</strong></td>
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<td>$0.00</td>
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<tr>
<td><strong>Net Other Income</strong></td>
<td>$3.95</td>
<td>$118.00</td>
<td>$114.05</td>
<td>$111.45</td>
<td>$333.00</td>
</tr>
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</table>

**Net Income:** $-87,307.78
Income and Expense by Month
October 2012 through September 2013

Income Summary
October 2012 through September 2013

- 3500 · BID Revenue (Quarterly) 95.71%
- 3800 · WMVB Monthly BID 3.15
- 3700 · Membership Income 1.03
- 3600 · Gift Shop Income 0.08
- 6000 · Other Income 0.02
- 3750 · Reservation Commissions 0.01
Total $1,198,655.92
Income and Expense by Month
October 2012 through September 2013

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<th>Month</th>
<th>Income</th>
<th>Expense</th>
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<td>Oct12</td>
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</tr>
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<td>Nov12</td>
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<tr>
<td>Sep13</td>
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</table>

Expense Summary
October 2012 through September 2013

- Direct Promotions: 44.77% ($450,000)
- Employee Expenses: 43.19% ($420,000)
- General & Administration: 6.13% ($400,000)
- Leases: 4.89% ($470,000)
- Other Expense: 0.60% ($650,000)
- Cost of Goods Sold: 0.29% ($510,000)
- Utilities: 0.10% ($480,000)
- Cost of Goods Sold: 0.03% ($390,000)

Total: $1,047,514.17
**MARIN AREA DESTINATIONS 2013**

"THE FIVE MOST REQUESTED LOCATIONS"

<table>
<thead>
<tr>
<th>Primary Destinations</th>
<th>Muir Woods</th>
<th>San Francisco</th>
<th>Point Reyes</th>
<th>Sausalito</th>
<th>Wine Country</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>38%</td>
<td>27%</td>
<td>18%</td>
<td>8%</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td>2012</td>
<td>38%</td>
<td>24%</td>
<td>19%</td>
<td>9%</td>
<td>25%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: MCVB/PKF/TIA/NPS
### Visitor Inquiries & Qualified Leads

<table>
<thead>
<tr>
<th>Year</th>
<th>4th Quarter</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>TBA</td>
<td>3054</td>
<td>2950</td>
<td>2904</td>
</tr>
<tr>
<td>2012</td>
<td>2413</td>
<td>3686</td>
<td>3808</td>
<td>3000</td>
</tr>
<tr>
<td>2011</td>
<td>2385</td>
<td>1849</td>
<td>3416</td>
<td>3728</td>
</tr>
</tbody>
</table>

Source: Direct leads received by the Marin Convention & Visitors Bureau
Qualified leads are received through telephone inquiries, emails, reader insertion cards, direct referrals, website banner ads, and actual visitors to MCVB offices.
### VISITOR TRANSPORTATION TO MARIN

**NUMBER OF VISITOR PER VEHICLE**

<table>
<thead>
<tr>
<th>Year</th>
<th>1 Person Per Vehicle</th>
<th>2 Per Vehicle</th>
<th>3 Per Vehicle</th>
<th>4 Per Vehicle</th>
<th>Day Trippers Use of Ferry Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>19%</td>
<td>43%</td>
<td>20%</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>2012</td>
<td>18%</td>
<td>47%</td>
<td>16%</td>
<td>7%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Source: MCVB/PKF/TIA/CalTrans
STATISTICS AND TRENDS OF HOTEL/MOTEL BUSINESS FOR NORTHERN CALIFORNIA EIGHT MONTHS THROUGH AUGUST 2013

ADR
Average Daily Room Rates

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
<th>VARIANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marin County</td>
<td>$137.01</td>
<td>$125.50</td>
<td>9.20%</td>
</tr>
<tr>
<td>Overall Average for No CA*</td>
<td>$158.42</td>
<td>$147.56</td>
<td>7.40%</td>
</tr>
</tbody>
</table>

% Occupancy Percent

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
<th>VARIANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marin County %</td>
<td>76.60%</td>
<td>73.30%</td>
<td>4.60%</td>
</tr>
<tr>
<td>Overall % Average for No CA*</td>
<td>77.40%</td>
<td>75.40%</td>
<td>2.70%</td>
</tr>
</tbody>
</table>

*Includes: San Francisco, SFO, San Jose/Peninsula, Oakland/East Bay, Monterey/Carmel, Central Valley, Sacramento, Marin County, Napa/Sonoma Counties, and other Northern California Areas.

Source: PKF Consulting
### STATISTICS AND TRENDS OF HOTEL-MOTEL BUSINESS
### NORTHERN CALIFORNIA MONTHLY TRENDS
#### EIGHT MONTHS ENDED AUGUST

#### REPORT OF ROOMS BUSINESS BY LOCATION

<table>
<thead>
<tr>
<th>Location</th>
<th>Average Daily Room Rate 2013</th>
<th>Average Daily Room Rate 2012</th>
<th>Variance 2013 to 2012</th>
<th>Occupancy Percent 2013</th>
<th>Occupancy Percent 2012</th>
<th>Variance 2013 to 2012</th>
<th>Revenue Per Available Room 2013</th>
<th>Revenue Per Available Room 2012</th>
<th>Variance 2013 to 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAN FRANCISCO</td>
<td>$220.23</td>
<td>$203.83</td>
<td>8.0%</td>
<td>85.4%</td>
<td>82.6%</td>
<td>3.3%</td>
<td>$188.07</td>
<td>$168.46</td>
<td>11.6%</td>
</tr>
<tr>
<td>SAN FRANCISCO AIRPORT</td>
<td>147.10</td>
<td>134.38</td>
<td>9.5%</td>
<td>83.2%</td>
<td>83.7%</td>
<td>-0.5%</td>
<td>122.45</td>
<td>112.46</td>
<td>8.9%</td>
</tr>
<tr>
<td>SAN JOSE/PENINSULA</td>
<td>152.09</td>
<td>138.87</td>
<td>9.5%</td>
<td>78.4%</td>
<td>76.8%</td>
<td>2.2%</td>
<td>119.30</td>
<td>106.60</td>
<td>11.9%</td>
</tr>
<tr>
<td>OAKLAND/EAST BAY</td>
<td>109.06</td>
<td>101.43</td>
<td>7.5%</td>
<td>75.4%</td>
<td>72.6%</td>
<td>3.8%</td>
<td>82.20</td>
<td>73.68</td>
<td>11.6%</td>
</tr>
<tr>
<td>MONTEREY/CARMEL</td>
<td>279.78</td>
<td>273.80</td>
<td>2.2%</td>
<td>71.3%</td>
<td>69.7%</td>
<td>2.2%</td>
<td>199.42</td>
<td>190.95</td>
<td>4.4%</td>
</tr>
<tr>
<td>CENTRAL VALLEY</td>
<td>78.95</td>
<td>76.19</td>
<td>3.6%</td>
<td>69.9%</td>
<td>68.4%</td>
<td>2.2%</td>
<td>119.30</td>
<td>106.60</td>
<td>11.9%</td>
</tr>
<tr>
<td>SACRAMENTO</td>
<td>97.45</td>
<td>94.03</td>
<td>3.6%</td>
<td>69.1%</td>
<td>68.4%</td>
<td>0.9%</td>
<td>67.30</td>
<td>64.35</td>
<td>4.6%</td>
</tr>
<tr>
<td>MARIN COUNTY</td>
<td>137.01</td>
<td>125.50</td>
<td>9.2%</td>
<td>76.6%</td>
<td>73.3%</td>
<td>3.3%</td>
<td>104.98</td>
<td>91.94</td>
<td>14.2%</td>
</tr>
<tr>
<td>NAPA COUNTY</td>
<td>224.37</td>
<td>204.78</td>
<td>9.6%</td>
<td>72.1%</td>
<td>70.7%</td>
<td>1.9%</td>
<td>161.70</td>
<td>144.87</td>
<td>11.6%</td>
</tr>
<tr>
<td>SONOMA COUNTY</td>
<td>136.89</td>
<td>133.05</td>
<td>2.9%</td>
<td>74.2%</td>
<td>68.5%</td>
<td>8.2%</td>
<td>101.54</td>
<td>91.19</td>
<td>11.3%</td>
</tr>
<tr>
<td>OTHER NORTHERN CALIFORNIA</td>
<td>78.92</td>
<td>77.02</td>
<td>2.5%</td>
<td>65.6%</td>
<td>62.7%</td>
<td>3.6%</td>
<td>51.81</td>
<td>48.33</td>
<td>7.2%</td>
</tr>
<tr>
<td><strong>OVERALL AVERAGE</strong></td>
<td><strong>$158.42</strong></td>
<td><strong>$147.56</strong></td>
<td><strong>7.4%</strong></td>
<td><strong>77.4%</strong></td>
<td><strong>75.4%</strong></td>
<td><strong>2.7%</strong></td>
<td><strong>$122.63</strong></td>
<td><strong>$111.22</strong></td>
<td><strong>10.3%</strong></td>
</tr>
</tbody>
</table>

#### REPORT OF ROOMS BUSINESS BY AVERAGE DAILY RATE

<table>
<thead>
<tr>
<th>Average Daily Room Rate Range</th>
<th>Average Daily Room Rate 2013</th>
<th>Average Daily Room Rate 2012</th>
<th>Variance 2013 to 2012</th>
<th>Occupancy Percent 2013</th>
<th>Occupancy Percent 2012</th>
<th>Variance 2013 to 2012</th>
<th>Revenue Per Available Room 2013</th>
<th>Revenue Per Available Room 2012</th>
<th>Variance 2013 to 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVER $175.00</td>
<td>$226.86</td>
<td>$210.95</td>
<td>7.5%</td>
<td>83.3%</td>
<td>81.1%</td>
<td>2.2%</td>
<td>$188.99</td>
<td>$171.04</td>
<td>10.5%</td>
</tr>
<tr>
<td>$125.00 TO $175.00</td>
<td>144.48</td>
<td>132.75</td>
<td>8.8%</td>
<td>80.0%</td>
<td>78.7%</td>
<td>1.7%</td>
<td>115.60</td>
<td>104.46</td>
<td>10.7%</td>
</tr>
<tr>
<td>$75.00 TO $125.00</td>
<td>104.58</td>
<td>99.18</td>
<td>5.4%</td>
<td>72.3%</td>
<td>70.0%</td>
<td>2.3%</td>
<td>75.58</td>
<td>69.42</td>
<td>8.9%</td>
</tr>
<tr>
<td>UNDER $75.00</td>
<td>52.52</td>
<td>50.25</td>
<td>4.5%</td>
<td>66.0%</td>
<td>63.8%</td>
<td>3.5%</td>
<td>34.69</td>
<td>32.07</td>
<td>8.2%</td>
</tr>
<tr>
<td><strong>OVERALL AVERAGE</strong></td>
<td><strong>$158.42</strong></td>
<td><strong>$147.56</strong></td>
<td><strong>7.4%</strong></td>
<td><strong>77.4%</strong></td>
<td><strong>75.4%</strong></td>
<td><strong>2.7%</strong></td>
<td><strong>$122.63</strong></td>
<td><strong>$111.22</strong></td>
<td><strong>10.3%</strong></td>
</tr>
</tbody>
</table>

#### REPORT OF ROOMS BUSINESS BY SIZE OF PROPERTY

<table>
<thead>
<tr>
<th>Size of Property</th>
<th>Average Daily Room Rate 2013</th>
<th>Average Daily Room Rate 2012</th>
<th>Variance 2013 to 2012</th>
<th>Occupancy Percent 2013</th>
<th>Occupancy Percent 2012</th>
<th>Variance 2013 to 2012</th>
<th>Revenue Per Available Room 2013</th>
<th>Revenue Per Available Room 2012</th>
<th>Variance 2013 to 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVER 400 ROOMS</td>
<td>$195.30</td>
<td>$180.39</td>
<td>8.3%</td>
<td>82.2%</td>
<td>80.1%</td>
<td>2.1%</td>
<td>$160.52</td>
<td>$144.54</td>
<td>11.1%</td>
</tr>
<tr>
<td>250 TO 400 ROOMS</td>
<td>184.19</td>
<td>170.94</td>
<td>7.8%</td>
<td>78.6%</td>
<td>77.5%</td>
<td>1.6%</td>
<td>145.11</td>
<td>132.56</td>
<td>9.5%</td>
</tr>
<tr>
<td>150 TO 250 ROOMS</td>
<td>162.36</td>
<td>151.53</td>
<td>7.1%</td>
<td>77.1%</td>
<td>75.3%</td>
<td>2.4%</td>
<td>125.23</td>
<td>114.13</td>
<td>9.7%</td>
</tr>
<tr>
<td>UNDER 150 ROOMS</td>
<td>108.54</td>
<td>102.15</td>
<td>6.3%</td>
<td>73.1%</td>
<td>70.5%</td>
<td>3.6%</td>
<td>79.31</td>
<td>72.05</td>
<td>10.1%</td>
</tr>
<tr>
<td><strong>OVERALL AVERAGE</strong></td>
<td><strong>$158.42</strong></td>
<td><strong>$147.56</strong></td>
<td><strong>7.4%</strong></td>
<td><strong>77.4%</strong></td>
<td><strong>75.4%</strong></td>
<td><strong>2.7%</strong></td>
<td><strong>$122.63</strong></td>
<td><strong>$111.22</strong></td>
<td><strong>10.3%</strong></td>
</tr>
</tbody>
</table>

**SOURCE:** PKF CONSULTING

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## BID Collections via Transit Occupancy Tax
### 2013 vs 2012 and 2011 Comparison

<table>
<thead>
<tr>
<th>BID Collections 2013</th>
<th>Fourth QTR 2012</th>
<th>First QTR</th>
<th>Second QTR</th>
<th>Third QTR</th>
<th>Total for 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$303,816.01</td>
<td>$275,331.12</td>
<td>$242,658.24</td>
<td>$315,849.31</td>
<td>$1,137,654.68</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BID Collections 2012</th>
<th>Fourth QTR 2011</th>
<th>First QTR</th>
<th>Second QTR</th>
<th>Third QTR</th>
<th>Total for 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$300,311.96</td>
<td>$224,777.64</td>
<td>$205,296.67</td>
<td>$272,049.73</td>
<td>$1,002,436.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BID Collections 2011</th>
<th>Fourth QTR 2010</th>
<th>First QTR</th>
<th>Second QTR</th>
<th>Third QTR</th>
<th>Total for 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$128,184.30</td>
<td>$93,217.71</td>
<td>$165,776.36</td>
<td>$260,148.16</td>
<td>$647,326.53</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total BID Collected</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total BID Collected</td>
<td>$647,326.53</td>
<td>$1,002,436.00</td>
<td>$1,137,654.68</td>
</tr>
</tbody>
</table>

### Total BID Collected Annually

- 2011: $0
- 2012: $375,000.00
- 2013: $750,000.00
- 2013: $1,125,000.00
- 2013: $1,500,000.00

*SOURCE: MCBV/COUNTY OF MARIN DATA*
Market Mix – August 2013

Northern California (Overall)

Northern California (not including S.F.)

San Francisco

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Tim Howard
Courtyard by Marriott Novato, General Manager
Chair

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Agricultural Institute, Director of Outreach
Vice-Chair

Kimberly Fornachon
Extended Stay Deluxe Hotels
Secretary

Michael Bates
Ad.Infin.Item
Treasurer

Sam Pahlavan
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Past Chair

2013 Board Members

Bill Blackburn
Best Western Corte Madera Inn
Marcus Lee
An Affair to Remember

Frank Borodic
Inn at Roundstone
Robert Marshall
Inn Marin

Susan Cunningham
Romantic Places
Hartmut Ott
Four Points by Sheraton

Jeffery Durkin
Holiday Inn Express
Marty Rubino
Big Cat Advertising

Sue Gregory
Point Reyes Seashore
Pat Sorber
Embassy Suites Hotel

Jeff Harriman
Point Reyes Seashore Lodge
Mark Vinsko
Marin Suites Hotel

David Hughes
Marin Airporter
SUMMARY

The MCVB will continue to promote and market the county with special emphasis on interactive and social media venue to attract a new clientele of visitor to Marin in the future.

Should you have any questions regarding the Marin Convention & Visitors Bureau 2013 Program of Work, please feel free to contact any of the following MCVB Personnel via e-mail or phone:

Mark L. Essman - President/CEO  mark@visitMarin.org
Christine Bohlke - Sales & Marketing Director  christine@visitMarin.org
Deborah Albre - Operations & Creative  deborah@visitMarin.org
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Phone: 415-925-2060  Fax: 415-925-2063  info@visitMarin.org

Thank you for your continued support!