



**Tourism Commission Meeting Minutes**  
**May 12, 2025**  
**Convention Center Board Room 214 - 1:00 pm**

*The following individuals were in attendance:*

**Commission and Voting Members** –Councilman John Gehrig; OCDC Joe Wilson. **Absent:** Tourism Commission Chair and Council President, Matt James; Mayor Meehan; Voting Members Sal Fasano; HMRA. Ruth Waters, OC Chamber of Commerce;

**Staff members present** –Tom Perlozzo, Director of Tourism; Larry Noccolino, Exec. Director; Brenda Moore, Lisa Mitchell, Special Events; Jessica Waters, Director; Erin Jones, Fiona O’Brien, Abigail Yesko, Marketing & Communications; Kim Mueller, Director of Sales; Nicole Olson, Ashley Johnson, Tourism Sales; Leslie Raven, Tourism & Business Development. **Absent:** Terry McGean, City Manager.

**Also present:** Susan Jones, HMRA; Amy Thompson, OC Chamber of Commerce; Zach Bankert, OCDC; Melanie Pursel, Worcester County; Crystal Collins, Art League of Ocean City; Zach Bankert and Joe Wilson, OCDC; Bethany Hooper, OC Today-The Dispatch.

**Tourism & Business Development Director, Tom Perlozzo called the meeting to order at 1:01 p.m.**

**Approval of February 10th, 2025 Tourism Commission Minutes** - No motion was made to approve minutes; there was no quorum to enable voting at this meeting. Tourism Commission Minutes will be approved at the June 9, 2025 meeting.

**ZARTICO PACING REPORT PRESENTATION By Bill Obreiter, VP Destinations, Zartico**

- Zartico is a data science company that helps understand the tourism economy's impact using big data sets like movement data from cell phone devices, credit card data, and lodging data.

**Lodging Data**

- The lodging data set is transactional, showing future reservations, which are compared to previous periods for pacing analysis.
- Data includes short-term vacation rentals (Airbnb, VRBOs) and chain hotels; independent hotels are not included, but chain hotels (21 hotels, 2,757 rooms, ~21% of total) are used as an index.

**Caveats**

- Coconut Mallorie Hotel was under renovation, not accepting reservations for May/June, affecting early summer data.
- Independent hotels are not included in the data.
- Group holds in chain hotels don't count until rooms are assigned.
- Origin of visitors is unknown until rooms are assigned.
- Vacation rental data includes 2,800 direct source properties (about a third of the market) and Airbnb/VRBO occupancy data.
- Data is a leading indicator, not 100% of total taxable revenue.

**National Trends**

- Hotel pacing is down nationwide compared to 2024, especially in areas dependent on Canadian



summer travel (e.g., coastal New Hampshire, Cape Cod).

- Vacation rentals are pacing up nationally, with southern destinations (Florida, South Carolina, Texas) performing better.

### **Ocean City Pacing**

- Summer (May-August): Increase in hotel revenue, flat rate; slight decrease in vacation rental revenue and occupancy.
- Early Summer (May-June): Hotel revenue up 10%, vacation rental up 1%.
- Late Summer (July-August): Hotels pacing up, vacation rental improving but still down 2% in revenue.
- September: Softness overall, but hotels are starting to fill in, especially around Bike Week.

### **Demand Analysis**

- Demand is visualized using a grid, with darker days indicating higher revenue.
- Boardwalk Rock and Ocean's Calling are big demand weekends.
- Midweek visitation is increasing due to promotions.

### **Origin of Visitors**

- Hotels: Increase in visitors from Allentown, Pennsylvania; Baltimore is improving; New York, Philadelphia, and Washington D.C. are pacing up.
- Vacation Rentals: Allegheny County, Pennsylvania (Pittsburgh) is a strong market.

### **Vacation Rental Policy Impact**

- Changes to vacation rental policies (length of stay requirements) on the southern boardwalk area impacted transactional revenue, but length of stay increased.
- Susan Jones, HMRA, commented that some of the vacation rental demand was dipping because of the change in what Council has done with the length of stay requirements. She wants to ensure it only affects R1-zoned properties and mobile homes which only affect 400 of 9,000 rental properties.

### **Southern Boardwalk Area & Revenue**

- The neighborhood affected by changes is in the southern boardwalk area where the Oceans Calling event takes place and did hurt the transactional revenue for R1 and mobile homes in that time period.
- Length of stay is increasing and overall revenue is picking up after an initial dip.
- The pacing of Ocean City is opposite of the entire country, possibly due to a loyal fan base and repeat visitors.
- Strong hotel demand, especially compared to other markets in the Northeast and Atlantic, is helping.

### **Vacation Rental Data**

- Joe Wilson, OCDC, questioned where the short-term rentals data comes from. Vacation rental data comes from Key Data Dashboard, which has a proprietary connection with professional vacation rental property management groups.
- Key Data sees into the inventory management software used by property managers, providing transactional vacation rental performance data.



- Key Data does not collect personal information like names, addresses, or emails.
- Scraping technology is used to look at Airbnb and VRBO for availability and pricing every day.
- This allows them to see the entire market and its sizing.
- They see about 7,800 out of approximately 9,000 vacation rentals.

### **CATCH-A-RIDE PRESENTATION By Darci Bandi, VP Account Director, BVK**

#### **Catch Ride Activation**

- This is the third year of the Catch-A-Ride program.
- The goals are to increase impressions.
  - Priorities include highlighting ocean species and Ocean City as an easy stop for drive markets.
- The number of locations has increased from six to thirteen this year, with two new locations.

#### **Road Trip Activation**

- The goal is to update the experience and align it with current themes.
- A sweepstakes will award one winner a three-night stay and a \$1,000 gift card.
- Tour stops heavily focus on sports events (Nats, Phillies, Orioles).
- A new addition is the Chesapeake Baysox, a minor league game.
- Ocean City will have a prominent presence at the stadiums.
- Other events include Brew at the Zoo, Baltimore and BBQ Battle in D.C.

#### **Promoting the Events and Sweepstakes**

- A press release was launched a week prior and gained media attention.
- Paid media and influencers are being used to promote the destination and sweepstakes.
  - Gas stations in target markets will display QR codes, encouraging people to visit Ocean City.
- Influencers will promote the destination in advance and during the tour.
- New Baltimore Magazine eNewsletter banners.

#### **Refreshed Activation Footprint**

- Elements that worked previously were retained.
- Road trip symbols highlight the proximity of Ocean City to key destinations.
- Features include:
  - A custom keychain station.
  - A van for photo opportunities.
  - Ski ball with prizes for high scores.
  - An itinerary board with three-day itinerary suggestions.

#### **Brand Ambassadors and Landing Page**

- Brand ambassadors will wear bright, festive uniforms.
- The landing page links to deals on CatchRideOCMD.com and a Spotify playlist.
- Playlists are customized per destination (Baltimore, Philly, D.C.).
- A travel guide handout includes a QR code linking to a visit or district planning tool.
- Sweepstakes entries have a 48% opt-in rate for future email communications which is much higher than the



average 20% option rate.

### **March and April Spring Paid Media Campaign**

- The campaign focused on digital channels for flexibility in messaging and targeting.
- Digital channels generated 50 million impressions and over 427,000 website clicks to ococean.com.
- YouTube performed well, with a 78% video completion rate. TikTok and Snapchat performed best with low cost and high engagement.
- Over 16,000 visitor guide downloads and rate check button clicks were recorded.
- TV strategy focuses on sports events (NCAA Final Four, PGA Championship and Masters Saturday, Kentucky Derby, NBA playoffs).
- Top cable networks (ESPN, TNT, HGTV) and targeted GEOs are utilized.

### **Sports Sponsorship Program and Creative**

- A sports sponsorship program was launched in April.
- Baltimore Oriole's Kjerstad hit a home run, displaying Ocean City signage.
- A rich media mobile ad is launching in May.
- End of July will bring sponsored content.
- Customizable connected TV ads are generating great click-through rates.

### **Rich Media Mobile Ads**

- Clicking "see more" expands the ad into a mini-website with a video.
  - Users can swipe up to access a catalog of activities (dining, events, booking, outdoor recreation).
- The ad originates on a user's phone.
- Click-through rates are three to five times higher than standard ads.

### **Out-of-Home Strategy and Creative**

- The out-of-home strategy involves focused flighting in target GEOs.
- The creative emphasizes fun and smiles in Ocean City.
- The campaign tagline is "Come discover somewhere to smile about."

## **TOURISM and BUSINESS DEVELOPMENT**

### **150th Recap**

- Updated slide deck includes the Summer Beach Safari, a kid's event with soccer, lacrosse, and football. Two events have been added in last week of August: an upcoming Olympic event called foot volleyball (played with feet) and Slippery Stairs (greased stairs competition). Both events come with ESPN TV coverage.
- The 150th-anniversary celebration involves collaborations with local businesses.
- Harborside is teaming up with NASA for their celebration.
- The 150th is about partner engagement, including events like Penguin Swim, Love on Tap, and the Seafood Festival in September at Northside Park and events from our partners like shop and play and midweek summer specials for the 150<sup>th</sup> Anniversary. Pop-ups will be seen sprinkling throughout Sunfest, i.e., Mobile Museum. Springfest had a flower workshop included which Erin Jones headed up. Rising Tides on November 22<sup>nd</sup> is one of the bigger events planned with 10 artists hosted by JJ Walker for the 70s Soul Jam festivities and Forever Young hosted by Chris



Kirkpatrick of NSYNC.

- The Anniversary Gala is planned for 12-12-25 at the Convention Center.

### **Event Challenges & Ideas**

- Sunset Market is unlikely to happen in 2025 due to budget constraints but is planned for 2026 and beyond.
- There are risk factors with the Summer Send Off, including hot air balloons (8 tethered off which would project laser shows off of them) and Monster Trucks.
- A community mural is planned for Sunfest.
- Fridays at Winterfest may include a fire and ice event.
- A balloon glow event was planned but faced contractual issues related to risk and legal aerials.
- Plan B ideas include drone shows, or a New York-themed week with deals for visitors with New York license plates. Currently in talks with Brian Lilly about another air show that we might be able to fit in that week.

### **Mural & Skatepark**

- A mural is planned for Sunfest, potentially displayed on a big wall and then moved to other events.
- There are concerns about community murals having too many people working on them, affecting the final product.
- The skate park looks good. Another mural is coming to the skateboard park.

### **Sports Complex Update**

- Research is underway for a Tourism Investment District (TID).
- The legal aspects of a TID are being examined to determine if state approval is needed.
- Additional property is being researched, with appraisals in progress.

### **Influencer Program and 150th Anniversary**

- Three influencers were brought in this spring, including a male golf influencer.
- A golf influencer video received positive feedback.
- Another male influencer and a family influencer are scheduled.
- Earned media placements for April totaled 137, with 835 million impressions.
- Influencers are creating itineraries and sharing their vacation stories.

## **CONVENTION CENTER UPDATES**

### **Convention Center Floor Installation**

- Installation of TaraFlex floors to begin July 22, 2025.
- Floors will have navy wood finish on the outside of the basketball courts.
- Middle of the courts will have hash marks for volleyball, basketball, and pickleball.
- Working on a logo for one or two of the courts.
- First event on the floor will be USA Field Hockey in mid-December.
- There will be 8 basketball courts and 24 pickleball courts.
- The volleyball setup from last weekend was on a rented floor by show promoter.
- This will be one of the largest installations in the US.



### **Convention Center Study**

- The state is trying to figure out a way to get a larger parking facility.
  - They want five floors versus four, but funding may not be available.
- A 15,000ft expansion can be included.

### **Escalator/Elevator Updates**

- Escalator inspectors to visit on Wednesday/Thursday.
  - Hoping to be ready to go on Friday morning.
- Small elevator construction to begin after escalators are running.
  - The small passenger elevator was originally here in 1970.
- South stairwell demolition and rebuilding to start around May 18.
  - Expect about 10 days of noise and dust.
- Newly paved parking lots are hopefully coming soon.
- In the FY26 budget, the perimeter will be relandscaped.
  - Hoping to get the fountain running.
- Refresh of upstairs areas with benches and planters is continuing.
- Lighting system inside the building (calls A, B, and C) needs to be upgraded.
  - Hopefully starting in a couple of weeks to a couple of months (June 1st).

## **CONVENTION CENTER SALES UPDATE**

### **Meeting Planner Relationships**

- Focus has been on building stronger relationships with meeting planners.
  - Bringing planners in to get their buy-in and understanding of what Ocean City offers.
- Key In-Market Engagements held:
  - MPI Potomac Board Retreat (14 planners).
  - HelmsBriscoe Familiarization Trip.
  - Ocean City Meeting Planner Advisory Board.
- Fiscal year Highlights (FY2024-25 to date)
  - 209 total bookings in FY25 compared to 181 total in '23/'24.
  - 163 events held at the Convention Center with over 215,000 attendees.
  - Close to \$99 million in economic impact.
- Leads & Future Room Nights:
  - Focusing on Sunday through Thursday business, youth business, and the off- season.
  - Generated 81 leads this fiscal year representing 13,671 potential room nights.
- Meeting Planner Feedback
  - Meeting planners are focused on the Baltimore, New York, New Jersey, DC, and Richmond drive-to market.
  - Focus on making people aware of what Ocean City has to offer for conventions.
  - Not focused on going after the national market due to ROI.
  - FAM trips have opened eyes, as some attendees had never been to Ocean City before.
  - Discussion on new low-cost airline, Breeze Airways to Orlando, should bring in more visitors



to OCMD.

#### Marketing and Advertising

- A new plan is in place for increasing advertising.
- Ocean City is now part of Meet in Maryland initiative which includes five partners including Visit Annapolis and Anne Arundel County; Visit Baltimore; Visit Howard; Visit Montgomery and Experience Prince George's developing a workplan that identifies key target markets, targeted meeting sizes and targeted geographic areas.
- Partners are understanding the impact of meeting planners.

#### **Budget**

- Budget is massaged as needed.
- Leisure is the primary driver of the economy, but the Convention Center's impact is recognized.

#### **Convention and Visitors Bureau (CVB)**

- CVB partnership is up.
- 400 members.
- Working on anniversary activations and increasing RFPs.

#### **SPECIAL EVENTS UPDATES**

##### **Springfest**

- Springfest was successful, with good attendance. Some businesses further up the boardwalk are experiencing issues due to the lack of tram service.  
New concepts:
  - 150th flower arrangements classes.
  - Art day with classes.
  - Sea glass workshop.
  - Sunrise yoga.
- Working on a Memorial Day event on Sunday of the weekend.
- Full blast on summer events: Sundaes in the Park, OC Beach Dance Party, Sunset Park Party Nights.
- Over 60 event days this summer.

##### **Bike Week Update**

- Mayor requested a two-year contract.
- Bill Odachowski of Kickin Events is taking over for Kathy Micheal.
- Same footprint in the parking lot.
- Times may be a little different, vans might be smaller, but more vendors in the parking lot.
- Goal is to recreate it as more of a rally versus a concert.
- Pacing was slow for Bike Week.
- \$130,000 of tickets were already sold by Kathy, and Matt is going to honor those tickets.
- In exchange, Matt will not pay any usage fees in the Convention Center.
- Event will be called Rock and Ride.



### **Street Painting/Street Murals**

- Considering a street painting festival, inspired by the one in Lake Worth, Florida.
- Could be a standalone event or added to Springfest week.
- Artists create chalk art on the street, and businesses are open along the side.
- Businesses are open, and murals are displayed by individual artists (professionals and amateurs).
- There was a section for kids to create chalk art. Director Perlozzo took pictures of the event, which was packed with families and kids.
- Director Perlozzo tried to get the artist list from Rina and has about 60 photos of the artists. He believes it could be a viral scenario with kids and high schools getting involved.

### **Beach Boxes/ ODC Publish Art**

- Director Perlozzo suggests painting murals on the beach boxes to promote Ocean City arts.
- There are restrictions on advertising on the beach with umbrellas and beach boxes.
- Director Perlozzo took videos and photos of the chalk art, which is temporary and washes off with rain.
- Director Perlozzo suggests putting vendors for connected businesses in sections of town or on the boardwalk during Springfest.
- Zach Bankert, OCDC, may have information about the ODC published art and the Beach Bird project and Director Perlozzo suggested the beach box idea is similar to the bird project.
- There is a program to help pay for painting rolled doors with murals and Tom suggested this could be a replacement for the utility boxes.
- There are similar events in Baltimore and Miami.
- Director Perlozzo recommends small social media buys to get a lot of response from artists.

### **Event Success**

- Director Perlozzo hopes everyone has their Boardwalk Rock tickets. Changes in entertainers for Boardwalk Rock announced two changes in the lineup with Alice in Chains and Def Leppard replacing Motley Crüe (Vince Neil recuperating from a medical procedure) and Nickelback and Shinedown headlining Sunday.
- Ticket sales for Boardwalk Rock have been good with visitors expected from all 50 states, up to 55,000 attendees.
- A five-year contract has been signed with C3 for three events each year.
- The date change for Springfest was to accommodate Cruisin'.
- These events and groups introduce people to Ocean City and serve as a marketing tool on their social media accounts.

### **Convention Center**

- Crossroads reported 604,000 people, and projections estimate close to 650,000 attendees at the Convention Center for FY25.
- About 50% of ticket holders have not been to Ocean City before.
- The music sector is a primary pillar, along with culinary arts.
- A five-year contract has the same dates, give or take, depending on the calendar shift.



### **Economic Cycles**

- Director Perlozzo mentions a shift in mentality to be aggressive and not take things for granted. Economic cycles can change, and asks to be informed of any roadblocks.

### **COMMITTEE REPORTS:**

#### **Chamber of Commerce – No Report**

##### **HMRA -**

- We received 325,000 OC Keycards Holders last week and re-distributed them to 55 hotel members. This pocket-sized booklet has 24 pages of ads, and the plastic room key is inserted into the back pocket and handed directly to hotel guests at check-in.
- We created a promotion for visits Sunday through Thursday - Midweek Smiles. OC Tourism is assisting with messaging and pushing out the Deals through ococean.com too.
- We recently installed our new Board of Directors and Officers for 2025-2026. Ruth Waters with the Harrison Group is the new President. A Board retreat is planned for May 14<sup>th</sup> to chart the future course.
- Restaurant Week wrapped up May 11<sup>th</sup> with 25 restaurants participating.
- The Find-a-Kid wristband program is being brought back this summer. Hotels that participate give families wristbands with the hotel name so if kids are lost, OCBP & OCPD can help facilitate reunions.
- We are planning a Customer Service Hospitality training session – June 3<sup>rd</sup> with 2 sessions, morning and evening for front-line employees. This will be training for delivering great service with the “miles of smiles – commitment to hospitality service” which is currently being developed.

#### **OCDC – No Report**

##### **Worcester County –**

- Worcester County Budget will be adopted June 3<sup>rd</sup>- work sessions are this week and next to balance the FY 26 budget gap
- Our office will be receiving a commendation from the commissioners on Tuesday the 20<sup>th</sup> at 10 am to celebrate National Tour and Travel Week and the impact of travel on our economy- all are invited to attend and be recognized as tourism partners and industry leaders. Next Town Talks (for Tourism and ED reps county wide) will be May 20<sup>th</sup> as well- 2pm virtual
- National Trails Day June 7<sup>th</sup>- County greenways and bikeways plan has been adopted by commissioners- development of Corkers Creek Bridge is on schedule to be replaced and Wildlands Trail from the state forest to Snow Hill in on track- Huge opportunity for outdoor recreation and connection to commerce.
- Salisbury/OC/Wicomico Airport- new carrier (Breeze) will go back and forth to Orlando International airport starting this fall.
- Hosting a Tour of Worcester to statewide Economic Development leaders May 14<sup>th</sup>
- Our office has joined the beach to bay heritage area, Wicomico and Somerset counties to form the Lower Shore 250 to celebrate the bi-sesquicentennial of America. This yearlong celebration will commence in 2026 and include the promotion of various historic sites, events, and promoting our rich history on Delmarva.



- Won MD Historical Trust Award for Best Programming with Beach to Bay Heritage Area-African American Heritage Campaign
- Our visitor guides have been ordered. We anticipate delivery soon- direct fulfillment, using Getaways on Display for out of market welcome centers; local distribution in branded racks in county (hotels, Walmart, Wawas etc.) as well as at airport.
- The welcome center is coming along, and renovations are almost completed- interactive kiosk is fully functional. We've ordered furniture and are hoping to do a ribbon cutting event of sorts there to celebrate the "refresh" later this summer. I am also working with Commence and MDOT SHA to acquire the entire property, so we can make the grounds and build a real showcase as you enter MD and Worcester County. Any Tourism based businesses in OC and Worcester may display marketing materials/brochures/guides etc.
- We're excited to host the 2<sup>nd</sup> annual agriculture week this year, August 2-10. This event will connect the Pocomoke Fair, Peach Festival and Blessing of the Combines to the following weekend with the Worcester County Fair. We already have seven committed farms and businesses eager to participate this year. We will begin promotions at the end of June.
- For media, we have new creative this summer through the digital billboard trucks with HD Marketing, we have placed two, ½ page print ads in the Maryland armed forces guides, we have committed to a page in the Inside Chincoteague guide and also have three new commercials produced and on air with Comcast.
- Any new video may be viewed on our You Tube site- <https://www.youtube.com/@MarylandsCoast/videos>

#### **OC Art League – No Report**

**Meeting was adjourned at 2:31 p.m.; no motion made; no quorum of Council Members at meeting.**

*Next meeting to be held, Monday, June 9, 2025 @ 1 p.m. Roland E. Powell Convention Center, Room 214.  
4001 Coastal Highway, Ocean City, MD 21842*



## Marketing Highlights – May 2025

📍 OCEAN CITY, MARYLAND

**BYK**

## Catch a Ride Activation



📍 OCEAN CITY COAST

## Program Summary



### Program Priorities:

1. Highlight OC is just a **road trip away** from key markets
2. **Maximize tour stops** –13 total days of activation including 2 new locations
3. Updated experience to **generate onsite leads** and sweepstakes entries

### Sweepstakes:

Three-night hotel stay and a \$1,000 VISA gift card redeemable for trip experiences. Gift card will be left at hotel for guest to pick upon arrival inside of a OCMD gift pack.



## Tour Stops (priority markets)



### Baltimore

- Brew at the Zoo May 24-25
- Orioles Homestand June 13-14

### Philadelphia

- Phillies Homestand May 30-June 1

### DC

- Nats Homestand June 6-8
- Chesapeake Baysox June 12
- BBQ Battle June 21-22



## Program Summary



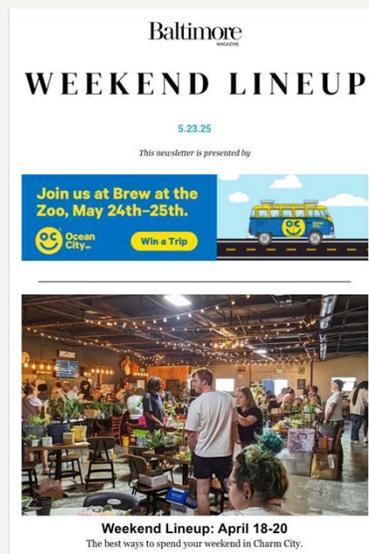
**Program Dates:** May 5 – June 29

**Promotion:**

1. **Paid Social** plan utilizing key platforms
2. NEW **Gas stations ads** promoting how Ocean City is less than a tank away
3. NEW Baltimore Magazine **eNewsletter banners**
4. **Influencers** in tour stop markets (DC, Philly, Baltimore)
5. Focused **Public Relations** strategy to announce the program May 5



## Promotional Ad Units



Somewhere to Smile About.  Ocean City, Maryland





## March + April Highlights: A Strong Start



### Campaign Momentum

- Over 50M impressions across digital channels
- The campaign has driven 427k clicks to [ocean.com](https://ocean.com)
- The YouTube placements are exceeding video completion rates by 78%
- TikTok and Snapchat performed best with low cost and high engagement

### Paid Search Conversions

- Google and Bing paid search have already delivered over 16k conversions
- A conversion is a Visitor Guide download or "Check Rates" button click

### Smart TV Strategy

- Strategic placements with high impact
- Airing during key tentpole events: NCAA Final Four, PGA Championship & Masters Saturday, Kentucky Derby, NBA Playoffs, MLB
- Supported by top cable networks: ESPN, HGTV, TNT, etc
- Customized buys by market for strongest reach

## Building on Success



**April:** Sports sponsorships kicked off

**May:** Rich media mobile unit launching

**July:** Sponsored content



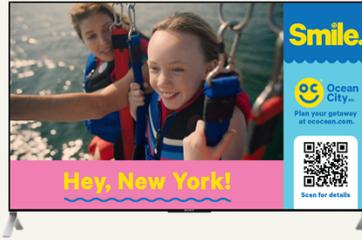
## Creative

OCEAN CITY BEACH

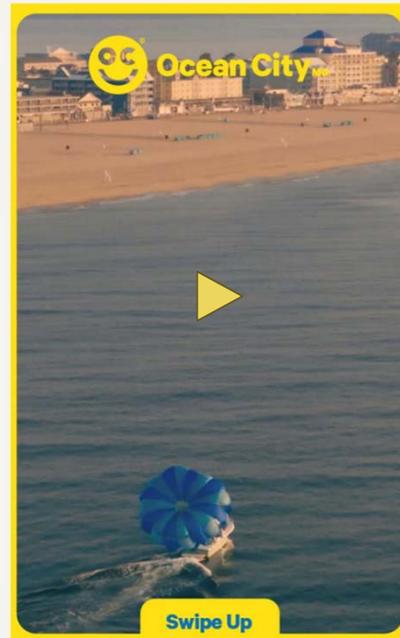
2025 Live Creative



April Print Issue



CTV - AdTheorent





**Dining**

Tap to close

< Swipe for more >

**Dig In**

Satisfy your seafood cravings all year long in Ocean City, Maryland.

**Dig in**

**Events**

Tap to close

< Swipe for more >

**Mark Your Calendar**

Find year-round events and celebrations in Ocean City, Maryland.

**Learn More**

**Lodging**

Tap to close

< Swipe for more >

**Stay Awhile**

Book your perfect beachside escape in Ocean City, Maryland.

**Book Now**

**Outdoor Adventure**

Tap to close

< Swipe for more >

**Get Outside**

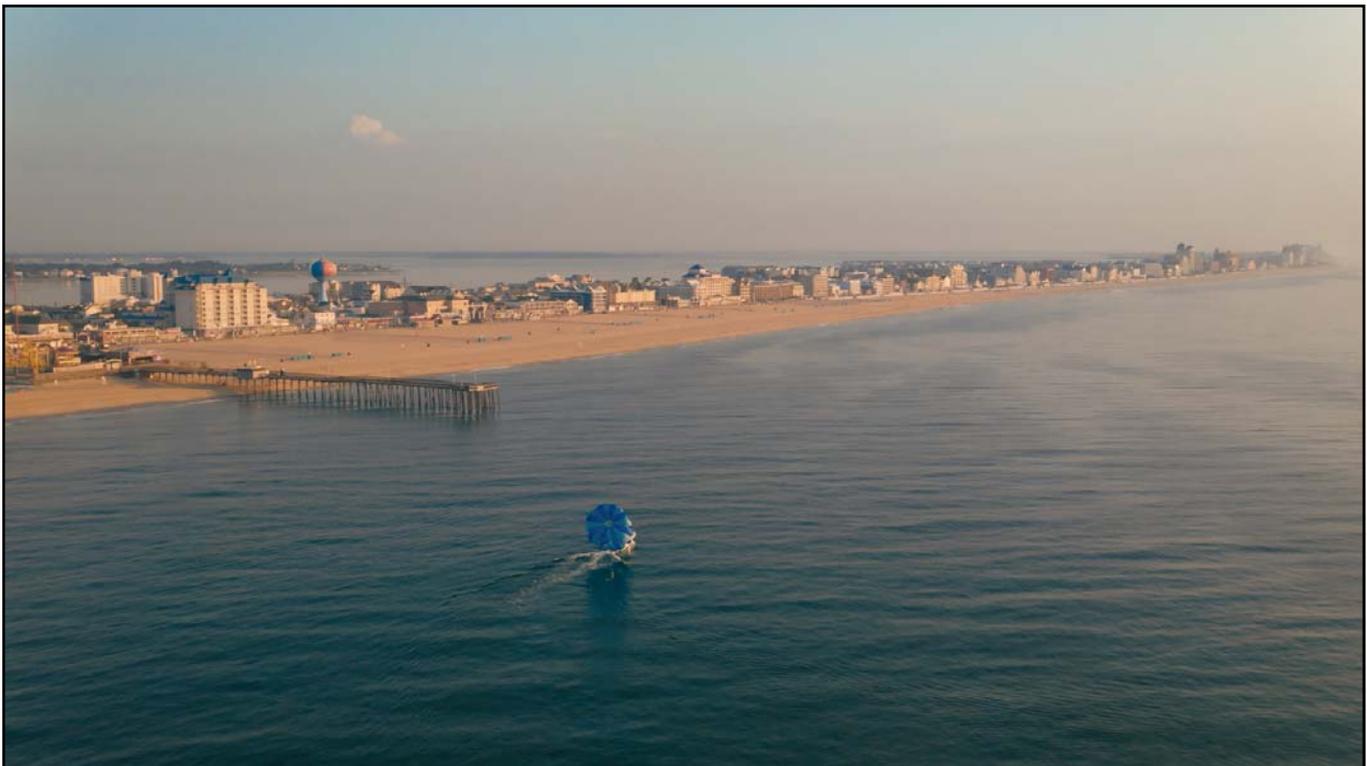
Pedal, paddle, ride and glide your way through Ocean City, Maryland.

**Learn More**

2025 Live Creative



Out of Home







## Explanations/ Caveats

**Hotel Data Set:** *Chain* Properties that distribute via Amadeus  
(21 hotels representing 2757 rooms- ~ 21% sample)  
*\*Coconut Malorie not accepting reservations in Spring*

**No Independent Hotels Measured in Pacing**

**Group holds don't count until assigned to a traveler**

**Vacation Rental Data Set:** 2,795 Direct Source Properties (7,273 overall)

**With Pacing revenue-** The values are the sample size and the percentage trend is the real insight!

**Not a substitute for tax collections:** but a leading indicator

## USA Hotel Pacing Behind 2024

- Hotel reservations on the books are pacing behind last year at the same time.
- Significant variance across destinations, with northern destinations showing the greatest declines



Source: Zartico Lodging Data - Powered by Key Data

## USA STVR Pacing Ahead of 2024

- Airbnb reservations are pacing consistently ahead of last year nationally.
- Vacation Rentals typically are booked farther in advance than hotel rooms.
- Southern destinations performing the best.



Source: Zartico Lodging Data - Powered by Key Data

**But in OC, it's the exact opposite.**



Source: Zartico Lodging Data - Powered by Key Data

## May 1- August 31 Pace

As Of 4/1/25

ADR		RevPAR	
\$308	+1%	\$97	+12%
\$305	compare	\$87	compare
\$387	+12%	\$108	+5%
\$346	compare	\$103	compare
Paid Occupancy %		Revenue	
31.6%	+11%	\$32.9M	+12%
28.5%	compare	\$29.4M	compare
28.1%	+6%	\$36.8M	+3%
29.9%	compare	\$37.8M	compare

As Of 5/1/25

ADR		RevPAR	
\$302	+2%	\$118	+6%
\$297	compare	\$111	compare
\$377	+11%	\$122	+6%
\$340	compare	\$116	compare
Paid Occupancy %		Revenue	
39.0%	+4%	\$39.9M	+6%
37.3%	compare	\$37.6M	compare
32.4%	+5%	\$41.9M	+1%
34.0%	compare	\$42.4M	compare

Blended 2.3% Increase in pacing revenue vs 2024

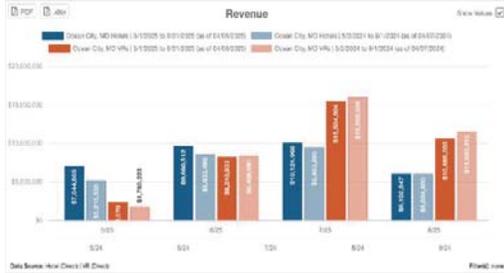
Sources: Chain Hotels within Zartico Data Set + Direct source vacation rental performance



# Monthly Revenue Pacing: May, June, July August

As of April 1

As Of 5/1/25



Sources: Chain Hotels within Zartico Data Set + Direct source vacation rental performance



# May & June 2025 Pacing Revenue

As of April 1

As Of 5/1/25

ADR		RevPAR	
\$260 (+4%)	\$250	\$99 (+18%)	\$84
\$321 (+15%)	\$279	\$63 (+8%)	\$58
Paid Occupancy %		Revenue	
38.2% (+14%)	33.5%	\$16.7M (+18%)	\$14.1M
19.7% (+8%)	20.9%	\$10.6M (+1%)	\$10.5M

ADR		RevPAR	
\$255 (+5%)	\$243	\$123 (+10%)	\$111
\$311 (+14%)	\$272	\$72 (+8%)	\$67
Paid Occupancy %		Revenue	
48.1% (+5%)	45.7%	\$20.6M (+10%)	\$18.6M
23.1% (+6%)	24.5%	\$12.2M (+1%)	\$12.1M

Sources: Chain Hotels within Zartico Data Set + Direct source vacation rental performance



# July + August 2025 Pacing Revenue

As of April 1

ADR			RevPAR		
\$379	+1%	\$382	\$95	+6%	\$90
\$422	+10%	\$382	\$153	+4%	\$148
Paid Occupancy %			Revenue		
25.1%	+7%	23.5%	\$16.2M	+8%	\$15.3M
36.3%	+6%	38.7%	\$26.1M	+4%	\$27.2M

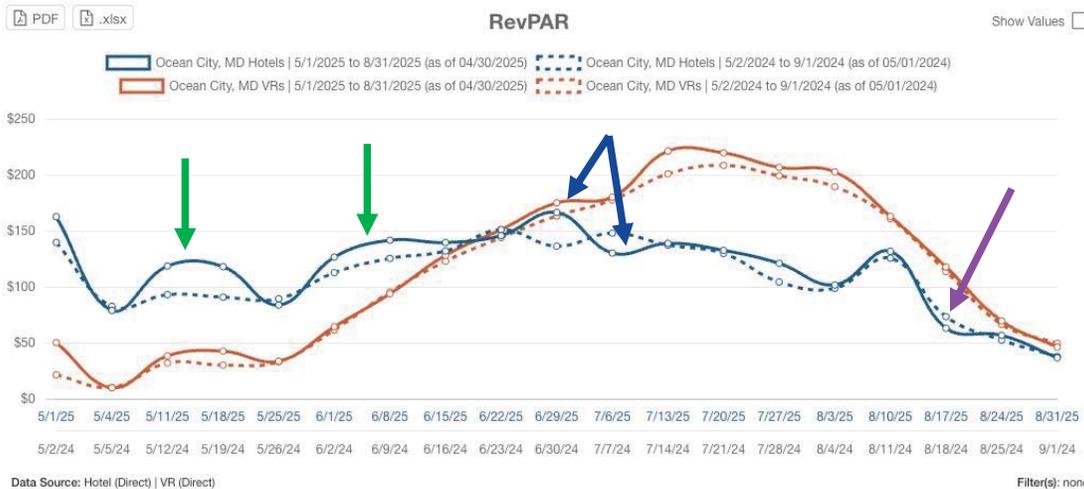
As Of 5/1/25

ADR			RevPAR		
\$377	+1%	\$380	\$113	+2%	\$111
\$414	+9%	\$378	\$172	+5%	\$163
Paid Occupancy %			Revenue		
30.0%	+3%	29.1%	\$19.3M	+2%	\$18.9M
41.5%	+4%	43.2%	\$29.7M	+2%	\$30.3M

Sources: Chain Hotels within Zartico Data Set + Direct source vacation rental performance



## Demand Compare by Week



# September Pacing Performance

As of April 1

ADR			RevPAR		
\$282	+4%	\$293	\$52	+8%	\$57
\$302	+20%	\$252	\$34	+7%	\$37
Paid Occupancy %			Revenue		
18.4%	+4%	19.3%	\$4.2M	+8%	\$4.6M
11.4%	+22%	14.6%	\$2.8M	+10%	\$3.2M

As Of 5/1/25

ADR			RevPAR		
\$278	+3%	\$287	\$60	+2%	\$61
\$302	+21%	\$250	\$37	+7%	\$40
Paid Occupancy %			Revenue		
21.6%	+1%	21.3%	\$4.9M	+2%	\$5M
12.4%	+23%	16.0%	\$3.1M	+11%	\$3.5M



# September Pacing Performance



# Bike Week Pacing Performance

As Of 4/1/25

ADR			RevPAR		
\$230	+8%	\$251	\$41	+15%	\$48
\$253	+10%	\$217	\$39	+10%	\$43
Paid Occupancy %			Revenue		
17.8%	+7%	19.2%	\$564.9K	+15%	\$662.9K
15.5%	+22%	20.0%	\$547.6K	+14%	\$635.6K

As Of 5/1/25

ADR			RevPAR		
\$233	+7%	\$249	\$49	+12%	\$56
\$253	+18%	\$215	\$42	+11%	\$48
Paid Occupancy %			Revenue		
21.2%	+6%	22.5%	\$679.7K	+12%	\$772.2K
16.7%	+24%	22.1%	\$591.8K	+15%	\$697.3K



# Oceans Calling Pacing Performance

As Of 4/1/25

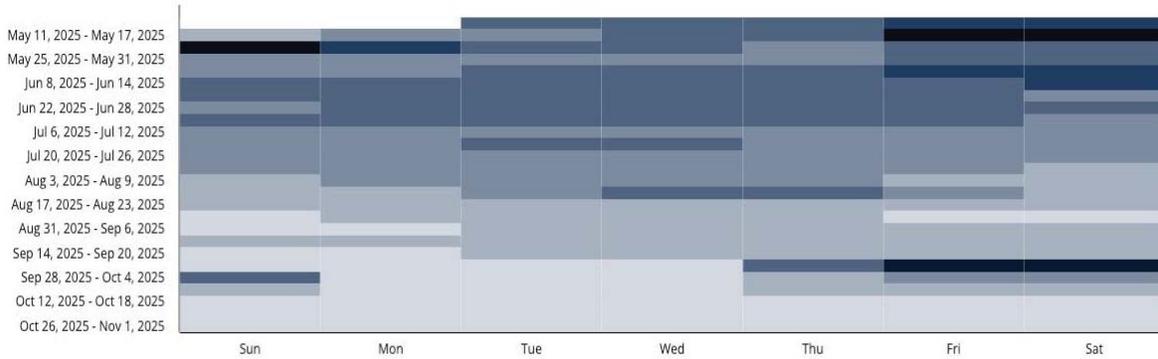
ADR			RevPAR		
\$380	+3%	\$391	\$203	+8%	\$220
\$517	+36%	\$380	\$95	+10%	\$106
Paid Occupancy %			Revenue		
53.2%	+9%	56.2%	\$2.2M	+8%	\$2.4M
18.4%	+34%	27.8%	\$1M	+13%	\$1.2M

As Of 5/1/25

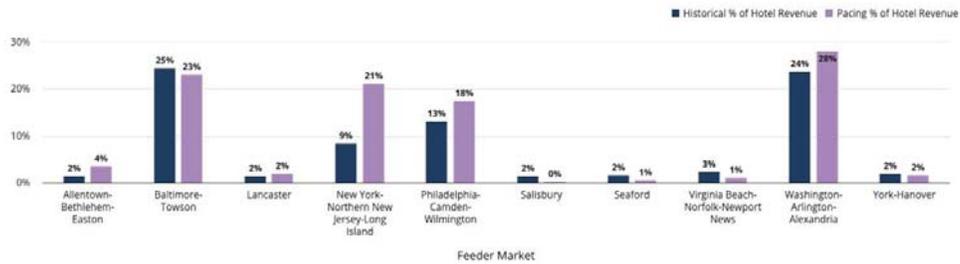
ADR			RevPAR		
\$369	+3%	\$379	\$178	+1%	\$179
\$505	+34%	\$376	\$82	+10%	\$91
Paid Occupancy %			Revenue		
48.2%	+2%	47.2%	\$2.4M	+1%	\$2.4M
16.2%	+33%	24.1%	\$1.1M	+13%	\$1.3M



## Demand by day insight in ZDOS



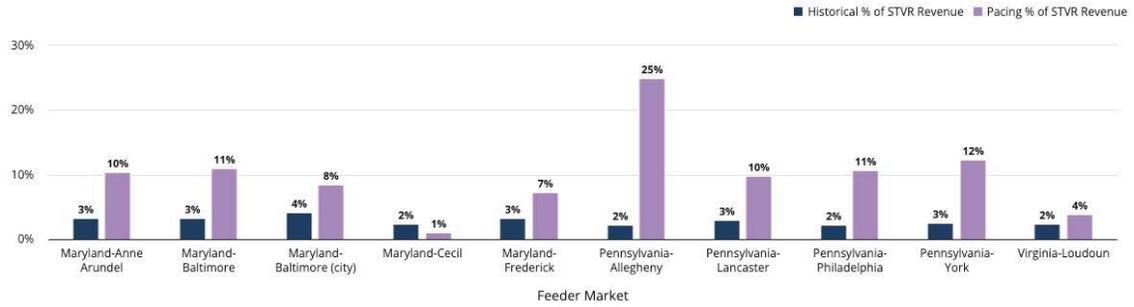
## Feeder Market Pacing Performance: Hotels



Next 6 Months



## Feeder Market Pacing Performance: STVR



Next 6 Months



# Thank You

