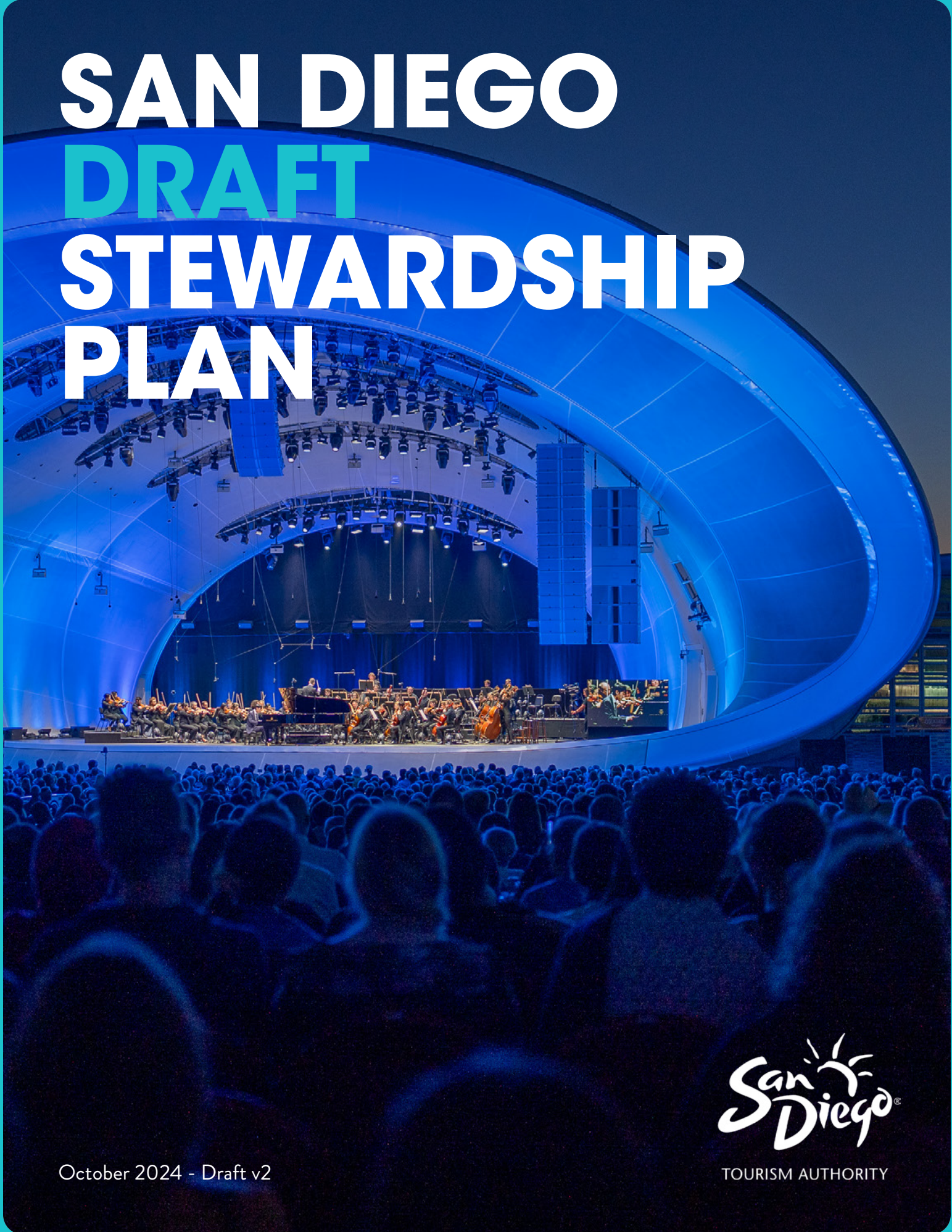


SAN DIEGO DRAFT STEWARDSHIP PLAN



October 2024 - Draft v2

TOURISM AUTHORITY



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ABOUT SAN DIEGO TOURISM AUTHORITY

The San Diego Tourism Authority is a 501(c)(6) private not-for-profit corporation that is governed by an 18-member board of directors comprised of industry and non-industry representatives. Founded in 1954, the SDTA mission is to drive visitor demand to economically benefit the San Diego region by attracting travelers to the destination for leisure, meetings and conventions.

The SDTA is a membership organization with more than 900 member businesses across all sectors of the industry including accommodations, restaurants, transportation, venues, professional sports, attractions, arts, entertainment, professional services, event planners and more.

Currently, 90% of the SDTA budget is funded by the San Diego Tourism Marketing District (SDTMD) with the remaining 10% of funding raised through private source revenues such as membership dues, advertising, service agreements, and federal grants. The SDTMD is a Tourism Improvement District funded by a two percent fee on each room night for lodging businesses with 70 rooms or more within the City of San Diego.

For more information, visit [SDTA](#) & [SDTMD](#).

WORKING IN PARTNERSHIP WITH VISIT CALIFORNIA

Since January 2023, Visit California has collaborated with the global consulting firm Jones Lang LaSalle (JLL) on the development of regional strategic plans for each of the state's 12 tourism regions. The initiative is a requirement of a U.S. Economic Development Administration pandemic recovery grant awarded to California.

The plans are designed to examine the full range of tourism dynamics, from destination brand perceptions to housing imbalances, environmental challenges, workforce development, public safety issues and infrastructure priorities.

The evolution of these plans has included over 1,500 touchpoints, including survey responses, presentations to stakeholders, monthly regional advisory committee meetings in each region, and 768 individual interviews. The process has involved careful study of existing state, regional and local plans. A key directive of this project is the fundamental understanding that the plans will not conflict with existing destination stewardship strategies, but rather work in concert with local efforts.

A cornerstone of the process is a first of its kind undertaking to measure each tourism region's resilience and sustainability. A comprehensive assessment is being conducted for each region, including international knowledge on risk and resilience planning by Risklayer, as well as expertise by the global environmental and sustainability consulting firm SWCA. A customized Resilience & Sustainability Scorecard will be developed for each region, along with incremental recommendations to ensure long-term success of the tourism ecosystem.

The 12 regional plans will offer actionable recommendations and implementation strategies in each region. The goal is for tourism businesses, DMOs and community leaders to use the findings to inform decisions, inspire partnerships, and build more sustainable prospects for the industry.

Visit California applauds the San Diego Tourism Authority's investment in an updated San Diego Tourism Stewardship Plan. There is no organization better suited to determine strategies to preserve San Diego's unique identity and enhance the quality of life for its residents.

ACKNOWLEDGMENTS

This Plan is a result of invaluable input, expertise, and collaboration between the staff at the San Diego Tourism Authority and the various organizations and individuals that participated in the Steering Committee. We extend our deepest appreciation to the following individuals and organizations:

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San Diego Tourism Authority

Special thanks to all residents and industry partners who provided input and feedback throughout the planning process. We look forward to your continued support and steadfast dedication to the stewardship plan vision.

SECTION 01

ABOUT THE PLAN



WHAT IS A TOURISM STEWARDSHIP PLAN?

A Tourism Stewardship Plan is a comprehensive and strategic framework that outlines goals, policies, and guidelines for the development, management, and promotion of tourism over the next decade.

The goal of the plan is to ensure that San Diego remains at the forefront of traveler preferences and sustains its reputation as a world-class destination, while balancing the quality of life for local residents and enhancing the natural environment of San Diego.

As such, the strategies outlined in this plan reflect a mix of recommendations that respond directly to the gaps and opportunities uncovered in the destination performance assessment, including **a) advancing the development of new cultural attractions and events, b) dispersing tourism activity and experiences** to farther reaches of the destination, and ultimately **c) enhancing the quality of jobs and career pathways** within the tourism and hospitality industry.



HOW WAS THE PLAN DEVELOPED?

San Diego's 10-year Tourism Stewardship Plan was developed with the support and participation of local and regional leaders, industry partners, as well as residents.

The stewardship planning effort was led by the San Diego Tourism Authority and supported by Resonance Consultancy and a steering committee comprising 16 key decision makers in the tourism industry. The steering committee has been engaged by the consultant team at key milestones to provide check-and-balance throughout the planning process.



The year-long, bottom-up planning process took a 6-phase approach that included stakeholder and community input at various stages:

A YEAR-LONG PLANNING PROCESS

OCT – NOV 2023	PHASE 01 Project Onboarding	1.1 Project Set Up 1.2 Strategic Review & Site
NOV 2023 – MAR 2024	PHASE 02 Community & Stakeholder Aspirations	2.1 Community Survey 2.2 Stakeholder Engagement Visit
JAN – MAR 2024	PHASE 03 Market & Trend Analysis	3.1 Industry Trends Analysis 3.2 Visitor Survey Review 3.3 Prioritization Staff Workshop
JAN – MAR 2024	PHASE 04 Destination Performance Assessment	4.1 Products & Experiences 4.2 Industry Workforce 4.3 Access & Transportation 4.4 Lodging/Hotel 4.5 Sports/Meetings/Conventions 4.6 Sustainability
APR – JUN 2024	PHASE 05 Destination Development Strategy	5.1 Stakeholder Visioning Workshops 5.2 Focus Area Strategies 5.3 Draft Plan
JUL – OCT 2024	PHASE 06 Tourism Stewardship Plan	6.1 Socialization & Validation 6.2 Final Plan 6.3 Governance & Action Plan

16

Steering Committee Members

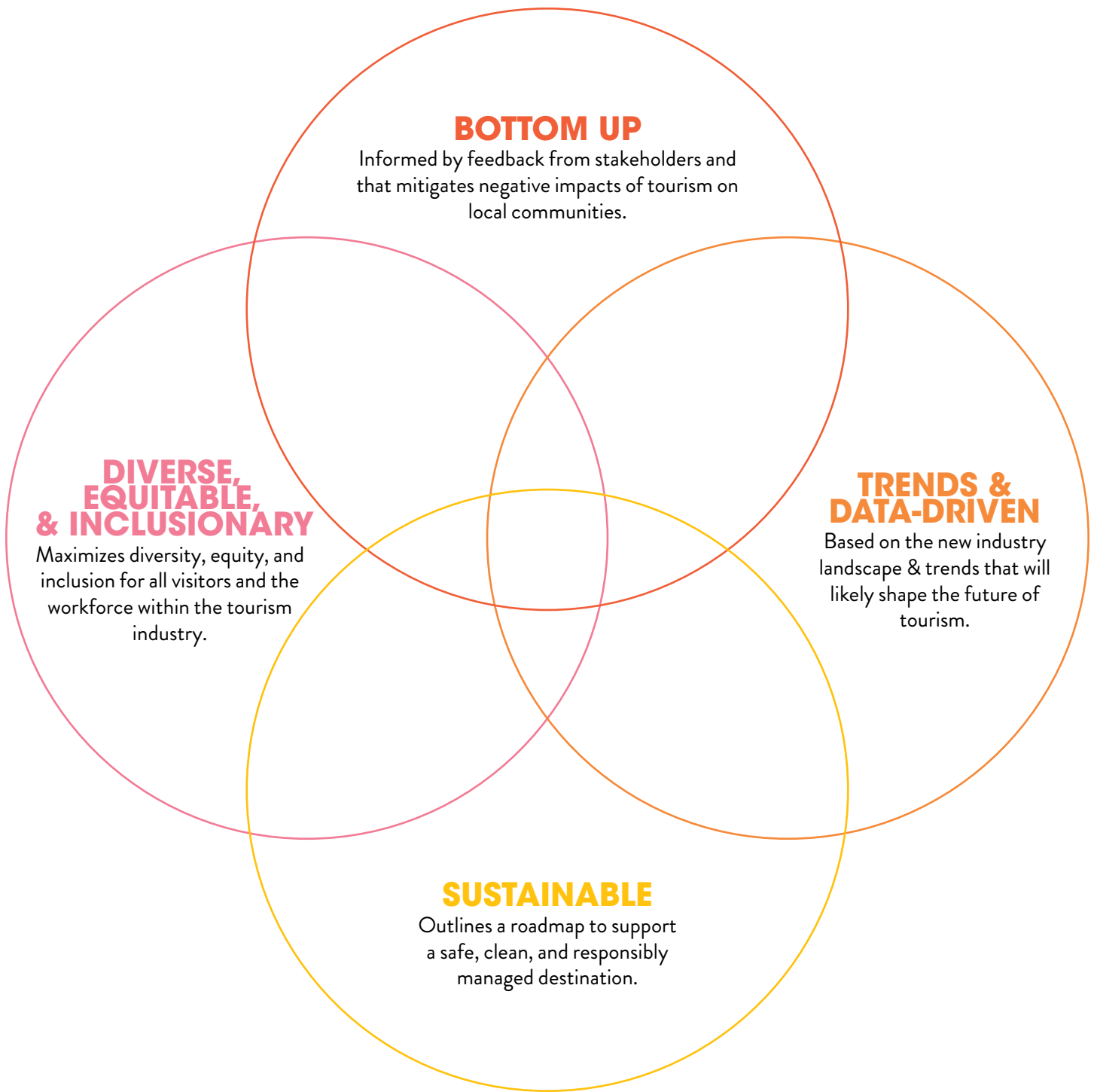
60+

Discovery Meetings, Tours
& Focus Groups Attendees

55+

Visioning Workshop
Attendees

In addition, over **2,000** community members completed our survey, sharing their perception on quality of life as it relates to the growth of tourism in San Diego.



This report is the final outcome of the stewardship planning process and is intended to serve as a guiding document for the San Diego Tourism Authority and its industry partners’ development initiatives and advocacy efforts over the next decade.

SECTION 02

DESTINATION PERFORMANCE HIGHLIGHTS

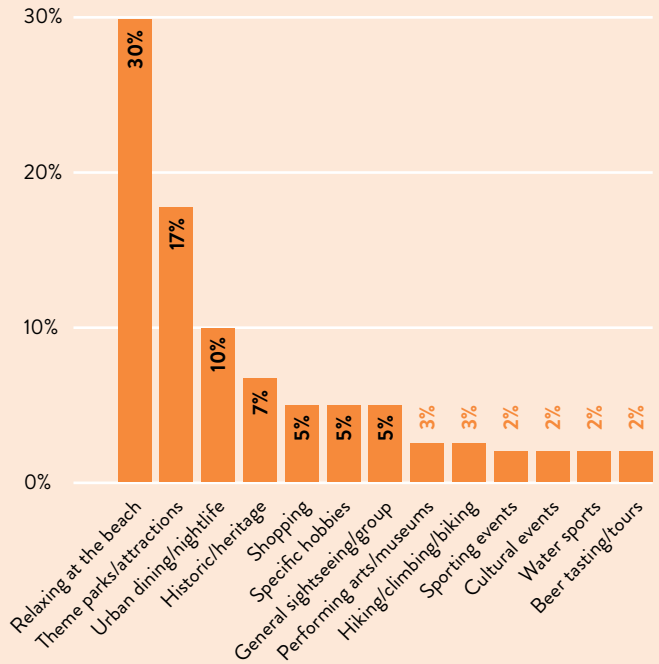


01

San Diego welcomes a diverse range of visitors who are spending time on more than just relaxing at the beach.

Past visitors shared that beyond 'Relaxing at the beach', top activities engaged in during their stays also often included **visiting theme parks/attractions** (17% of visitors), **urban nightlife and dining** (10%), **visiting historic/heritage sites** (7%), and **taking part in outdoor adventure** (7%).

OVERNIGHT LEISURE - TRIP INTERESTS



Source: San Diego Tourism Authority (2022)

02

San Diego's collection of outdoor activities and experiences is one of the best in the world.

Although its current outdoor experiences are heavily focused on water-based activities, the destination has the opportunity to develop and leverage other outdoor adventure experiences, from valley to the mountain and desert. Given the destination's ecological diversity, the range of quality outdoor activities should also grow to reflect these terrains and include greater opportunities to be outdoors in the desert and mountains.

OUTDOOR PRODUCTS/EXPERIENCE COMPETITIVE RANKING

San Diego	1
Sydney	2
Honolulu	3
Miami FL	4
Singapore	5
Las Vegas	6
San Francisco	7
Los Angeles	8
Chicago	9
Seattle	10

Source: Resonance Consultancy (2024)

03

San Diego has world-class anchors in performing arts and museums, with opportunities to expand existing programming.

From the influences of the Chicano, Mexicano, Latino and Indigenous arts and culture, to newer Asian immigrant communities, the destination has an opportunity to expand on its successes by supporting local artists and investing in new cultural products that are far more reflective of regional history and heritage and that showcase more diverse forms of music, dance, film, and theater, and attract more visitors throughout the year.

CULTURAL PRODUCTS/EXPERIENCE COMPETITIVE RANKING

Las Vegas	1
Los Angeles	2
Singapore	3
Chicago	4
San Francisco	5
Washington DC	6
Sydney	7
Boston	8
Seattle	9
San Diego	10

Source: Resonance Consultancy (2024)

04

While hotels have resumed seasonality patterns, there remains an opportunity to grow demand in shoulder months.

Occupancy in the months of May, and Nov-Jan are lagging and could be supported with specific investment in marquee festivals and events during this time to activate the destination during off-peak season.

AVERAGE OCCUPANCY RATES IN 2023 (BY MONTH)

January 64%	February 76%	March 78%
April 77%	May 74%	June 84%
July 87%	August 77%	September 77%
October 78%	November 68%	December 60%

Low Months
 High Months

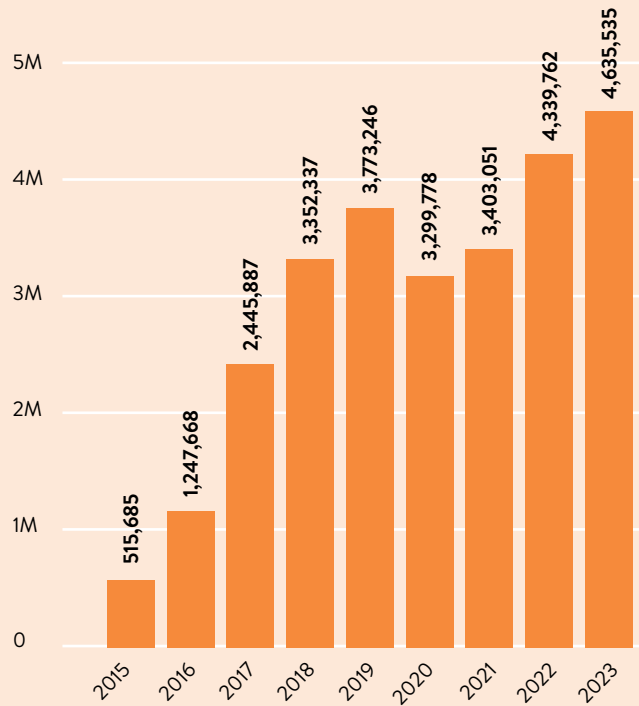
Source: CoStar (2024)

05

San Diego has seen a significant growth in short-term rental supply since 2015 while hotel growth remains muted.

Available short-term rental room nights increased from slightly more than 500,000 in 2015 to more than 4.3 million in 2022. However, pressure to recapture short-term rentals for primary housing purposes may pose a future risk for San Diego’s visitor economy.

OVERNIGHT LEISURE - TRIP INTERESTS



Source: San Diego Tourism Authority (2022)

06

San Diego is a sustainable destination with the potential to position itself as a leader nationally.

San Diego’s overall sustainability diagnostic score of 0.68 indicates its above-average performance in sustainability. However, in order to receive a Global Sustainable Tourism Council certification, it will need to build upon efforts particularly in stewardship planning, visitor management, destination infrastructure, marketing and communications of responsible visitor behaviors, and community stewardship.

OVERALL SUSTAINABILITY DIAGNOSTIC SCORES

Stewardship Planning	0.57
Regular Framework	0.89
Visitor Management	0.40
Natural & Cultural Heritage	0.77
Destination Infrastructure	0.70
Marketing & Communications	0.60
Community Stewardship	0.60
Community Resilience	0.80
Environmental Resources	0.80
TOTAL	0.68

Source: Tourism Impact Services (2024)

07

Significant infrastructure projects planned and underway demonstrate San Diego's commitment to sustainable travel.

With the expansion of Terminal 1, San Diego has the opportunity to grow domestic demand for leisure travel and attract more travelers from outside the western U.S. The planned airport transit connection will also create a direct link between the San Diego International Airport, downtown San Diego and the regional transit system, changing the way that visitors choose to explore the destination and its neighborhoods.



08

The tourism industry continues to face high turnover rates in key sectors and the workforce remains challenged by housing affordability.

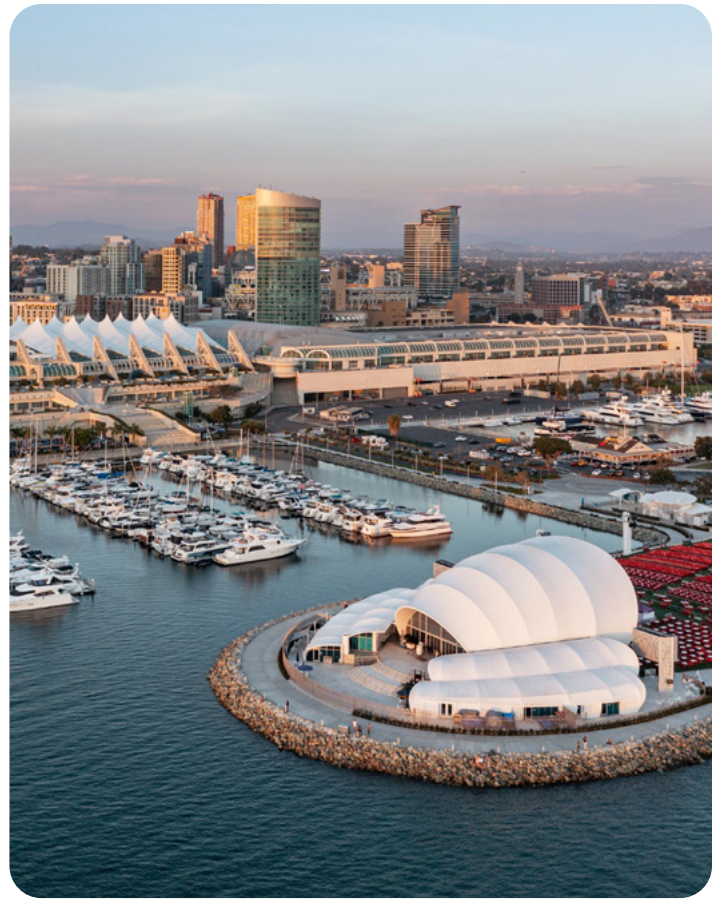
Many stakeholders across the region, as far as Oceanside, shared that the housing affordability issue across the state remains a key factor for the lack of service industry employees. The issue persists even with a large share of employees in hospitality commuting in from across the border.



09

The San Diego Convention Center is very competitive and offers one of the best packages.

While the expansion of the Convention Center (SDCC) is not likely to happen in the near future, it remains one of the most competitive assets nationally in terms of adjacent offerings to the convention center. Within a 15-minute walk, there are more than 5,300 adjacent hotel rooms to the SDCC and 429 dining and drinking establishments, making San Diego 5th in rank in total amenities against its competitive set.



10

San Diego is well suited to cater to the discerning urban traveler from beyond the West Coast.

Regardless of their origin market and trip purpose, today's travelers are increasingly seeking experiences to deeply immerse themselves in the localities of the destination. San Diego is best positioned to support these desires through its hundreds of neighborhoods that reflect the multicultural fabric of its community. From Little Italy, and Barrio Logan and Chicano Park to Kearny Mesa, these neighborhoods offer unique cultural experiences, culinary exploration and community events to learn about the diverse communities of San Diego.





To read the full Destination Performance Assessment, [visit our project website.](#)

SECTION 03

SAN DIEGO AHEAD





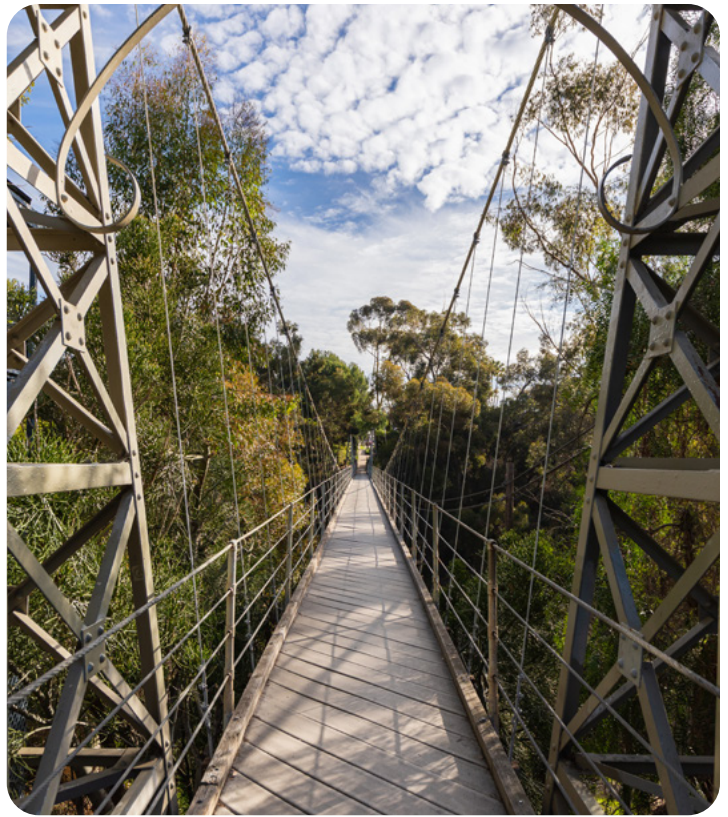
VISITOR OF TOMORROW

The Experiential Explorer values authentic encounters, cultural immersion, and the great outdoors.

With efforts from SDTA to focus on long-haul and higher yield travelers, and growing interest around “urban and cultural experiences”, San Diego has an opportunity to leverage its world-class museums and theaters, diversity of neighborhoods and communities, and arts, cultural and culinary assets to take the Experiential Explorer from beach to concert hall in a day.

Regardless of origin market, the Experiential Explorer values authentic encounters, cultural immersion, and sustainability in their travel experiences. They are likely to be well-versed in travel, seeking authentic and unique experiences that go beyond traditional tourist attractions. They are as interested in food trucks as they are in fine dining, as inquisitive about museums as they are about the architecture of Balboa Park and the murals of Chicano Park. They love the roar of waves and sound of a concerto. They appreciate the everyday and the extraordinary; their idea of sustainability embraces nature, art, and culture.

Given their aptitude for seeking the unconventional, they might be interested in exploring San Diego’s rich cultural scene, from museums, galleries, and performing arts venues, to restaurants, pop-up dining, and alfresco streets. They might also be drawn to the city’s vibrant nightlife and entertainment options, seeking out hidden gems and local hotspots. While sustainability and environmental consciousness are likely to be important influences for their accommodation and transportation preferences, above all they appreciate experiences that allow them to connect with nature while minimizing their impact on the environment.



OUR VISION

From California's Beach City to a Cultural Hub that Welcomes the World.

Visitors know San Diego for its beaches and its strong meetings and conventions calendar but the third leg of the stool is its mosaic of cultures and urban experiences.

We'll introduce the world to the San Diego they don't know over the next decade: that we're a hub of many cultures, from the beach to the arts, from sports to dining. That we're stewards of coastal nature, explorers of two nations, and proud of our many neighborhoods. That we live way beyond the beach and that the world is invited to live our many urban cultures with us.

In 20 years, San Diego will be the epitome of a sustainable, experiential tourism destination. The city will be known for its seamless integration of both technology and contemporary arts, and history and creativity, offering visitors a unique blend of nature and outdoor adventure.

San Diego's stunning beaches, parks, and outdoor recreational opportunities will continue to be key attractions, but with a strong emphasis on conservation and eco-friendly practices. Visitors will experience the city through immersive, interactive tours that highlight our rich history, diverse culture, and commitment to sustainability.

Our renowned hospitality industry will evolve to cater to a more curious, experience-driven explorer, with hotels and resorts incorporating green practices and offering authentic, locally inspired experiences. Culinary tourism will flourish, showcasing San Diego's vibrant food scene and commitment to farm-to-table dining.

A decade from now, San Diego will be renowned as a destination that not only delights visitors, but also inspires them to become stewards of the environment, ensuring the city's appeal for generations to come.

PILLARS OF OPPORTUNITY

Following extensive engagement with industry stakeholders, the following key opportunity areas for product/experience development, program design, and infrastructure improvements were identified to ensure the destination is able to better meet the needs of discerning urban visitors and blended travelers.

The strategies outlined in the next section of this plan will align closely with the pillars of opportunity below, and are intended to apply across greater San Diego. As such, it is acknowledged that successful implementation of the plan will require shared regional responsibility and collaboration with entities across various industries and geographies.

ARTS, CULINARY & CULTURE

Showcase our world-class cultural anchors, artists, and iconic neighbourhoods & communities

THE GREAT OUTDOORS

Promote sustainable and memorable experiences throughout Greater San Diego.

SPORT, MEETINGS & EVENTS

Welcome future-forward conventions, meetings and events throughout the region

MOBILITY

Create easy access and low impact ways to travel to & around Greater San Diego

BUSINESS & WORKFORCE DEVELOPMENT

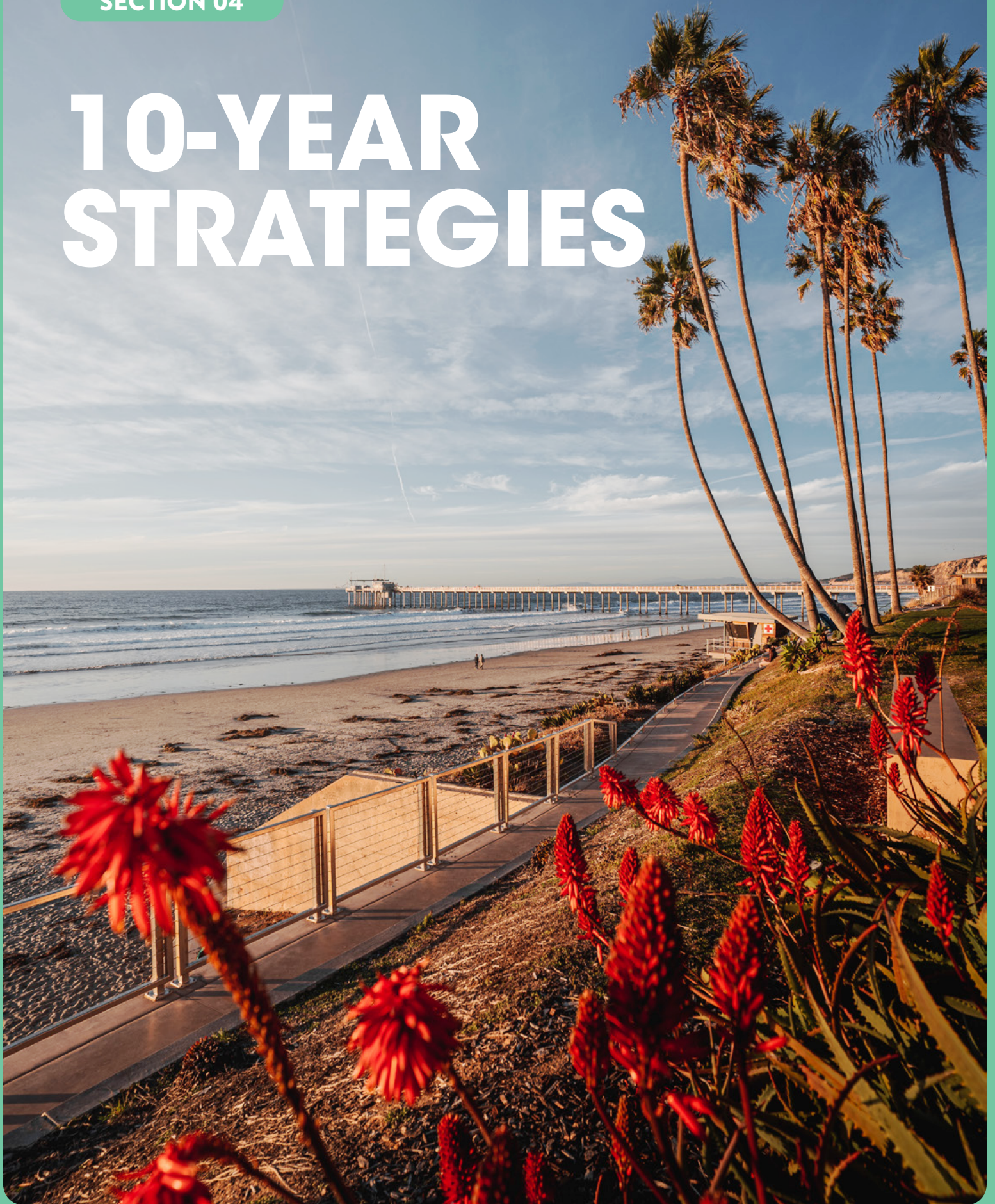
Design career pathways & growing industry innovation and inclusivity

GOVERNANCE & MANAGEMENT

Build a shared, regional framework for sustainable destination stewardship

SECTION 04

10-YEAR STRATEGIES





The following strategies outlined in the plan will be phased in for implementation over the next decade, through strong partnerships and collaboration with experts across the industry—many of whom have been involved in the planning process to-date.

STRATEGY MATRIX

PILLAR OF OPPORTUNITY

STRATEGY

ARTS, CULINARY & CULTURE

Cultivate a year-round roster of diverse arts & cultural events & performances that generate overnight stays

Foster local champions for the destination

Expand promotion of and accessibility to destination neighborhoods

Continue to position Balboa Park as the destination's cultural icon

THE GREAT OUTDOORS

Position San Diego as an ecologically diverse destination and leverage San Diego's breadth of natural assets for adventure experiences

Support sustainable use of natural attractions and responsible travel behaviors

Promote existing and new regenerative volunteer tourism experiences

Create & promote once-in-a-lifetime experiences in the big outdoors

SPORTS, MEETINGS & EVENTS

Support expansion of new events across all submarkets

Support new event planners and promoters by identifying issues/barriers to event planners and provide educational resources to event planners on approval processes

Develop a next-generation multi-purpose event venue

Pursue Convention Center Expansion

MOBILITY

Encourage industry employees to use alternative transportation

Educate visitors on multi-modal transportation options across the region

Prioritize accessibility improvements across the destination

BUSINESS & WORKFORCE DEVELOPMENT

- Support development of workforce housing
- Develop industry-specific workforce training opportunities
- Create a unified campaign to attract/retain hospitality workforce
- Support good employers and celebrate innovative & competitive employment initiatives
- Dedicate internal resources and funding for DEI Initiatives

DESTINATION GOVERNANCE & MANAGEMENT

- Establish a destination stewardship council
- Create a comprehensive visitor impact monitoring system and management system
- Support and celebrate sustainability initiatives in the industry





ARTS, CULINARY & CULTURE

WHY IT MATTERS

From the influences of the Chicano, Mexicano, Latino, Asian, and Indigenous arts, culture, and cuisines to the lauded Balboa Park, San Diego has the opportunity to become a coveted arts & cultural destination for Southern California. While San Diego does have room to improve on its offering of quality cultural performances and concerts throughout the year, its strengths lie in the local pride that artists and residents have for the city's cultural and culinary scene. As such, telling the stories of our architecture, arts, food and culture from the point of view of locals and featuring the voices of local artisans that make up our neighborhoods will enable visitors to get to know the real San Diego.

Cultivate a year-round roster of diverse arts & cultural events & performances that generate overnight stays

In 2023 alone, performing arts and cultural venues and museums across San Diego welcomed 3.3 million visitors originating from outside a 50-mile radius of the city. Although visitation related to conventions and meetings may have traditionally generated greater economic impact with longer overnight stays and average daily spending, San Diego's vast network of world-class cultural institutions, arts organizations, and lauded artists continues to grow its base of out-of-town visitors, as well as repeat loyal regional visitors.

As such, the destination has the opportunity to support and build on the successes of those cultural events and performances happening throughout the year that have grown their own niche audience segments and not only convert these visitors into overnight stays but make the arts and culture more accessible to other audiences who may be in San Diego for other trip purposes, whether business/meetings or outdoor recreation.

In addition, San Diego should continue to build on existing efforts of the 2024 World Design Capital (and the binational collaborations that have grown out of arts organizations and institutions on both sides of the border) to attract new, recurring signature arts and cultural events during off-peak seasons to drive overnight stays through iconic cultural experiences in the city.

ACTIONS

01

Attract annual signature events during the shoulder seasons centered on San Diego's multifaceted culture and binational identity

02

Develop and manage a destination-wide calendar of major cultural events for key venues across the destination for inter-agency coordination and marketing purposes

03

Create marketing packages of niche cultural experiences that build on existing events and festivals (e.g. film festival circuit) through use of Transient Occupancy Tax funds

04

Seed the creation/expansion of new and emerging cultural and neighborhood events that can support additional overnight stays pre-/post-conventions/meetings and during shoulder seasons

CASE STUDY

VisitPittsburgh Emerging Festivals & Cultural Events Fund

VisitPittsburgh supports the growth and expansion of leisure events through a micro grant program that offers funding of up to \$5,000 to event organizers of emerging Pittsburgh events. These funds are intended only to market and grow awareness of the event, grow the scope of the event, or to increase the share of out-of-town visitors to the event - for example, through partnerships with hotels.

VisitPittsburgh supports events for a maximum of three years, with sponsorship dollars decreasing by 50% with each subsequent year with the goal that by its final year of funding, sufficient support has been provided to allow event organizers to 'graduate' and seed funding from alternative sources. In addition to cash funds, VisitPittsburgh matches support through in-kind advertising dollars.



CASE STUDY

City of Sydney's "What's On" Guide

The city-managed events website maximizes engagement with the variety of agencies, organizations, and individuals that organize events throughout the city through a custom-built event listing function that allows organizers to submit their events directly to the website.

The user-friendly web interface also enables residents and visitors to easily browse events listings via a range of search tools (by keywords, topic/theme, by submarket/neighborhood location, by day/time, and even accessibility requirements). The event guide also curates based on upcoming events for the week/month and any national/international holidays such as National Science Week.

Regular reminders are sent out through newsletters to agency and neighborhood partners to continuously populate the events guide.



Foster local champions for the destination

In a survey distributed by the San Diego Tourism Authority in 2024, over 87% of locals agreed they felt proud to live in a region that is a popular travel destination and 97% believed in the importance of tourism to the local economy. These sentiments indicate the strong sense of pride that locals have for the destination that could potentially be channeled into effective brand ambassadors and authentic product development for San Diego.

More importantly, to ensure that locals continue to share positive sentiments for the growth and development of the destination, it is important for San Diego to inspire and create opportunities for locals to play a larger role in the visitor economy and actively participate in shaping the future of the destination. Visitor preferences are, after all, shifting toward experiencing the true essence of a destination through local food, crafts, cultural practices, and interactions with local residents as evidence by various industry research showing the importance of authenticity in tourists' decision-making processes and overall satisfaction. In many instances, visitors are even placing greater value in immersive and genuine interactions with local cultures over traditional forms of sightseeing.

Additionally, by inspiring locals to spread the love of the destination, San Diego will be able to amplify its brand through non-traditional marketing channels to every corner of the community imaginable.

ACTIONS

01

Provide technical support (e.g. marketing, branding, business planning) and funding to local artists and entrepreneurs creating unique culinary and cultural experiences for visitors

02

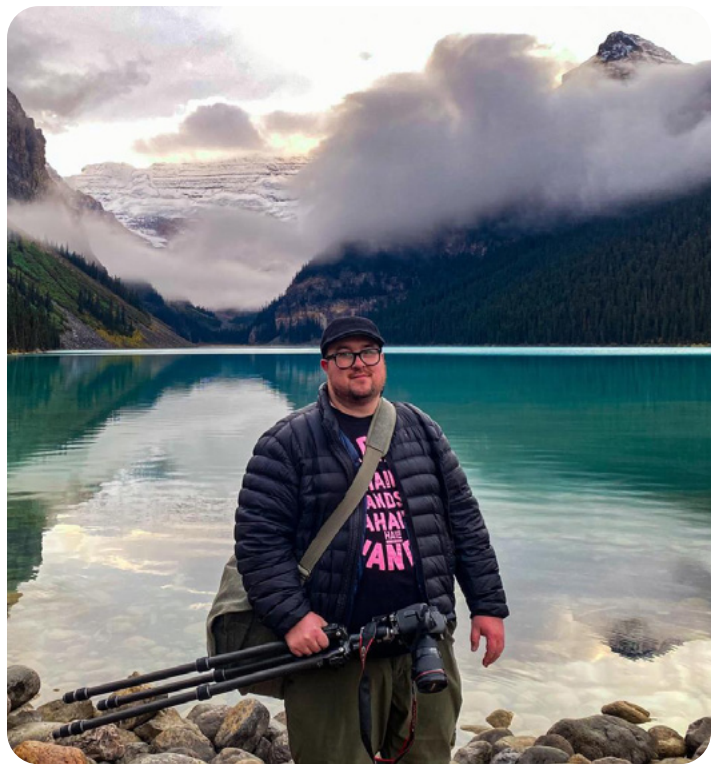
Create a local brand ambassador program that provides front-line workers, local influencers, and residents the tools necessary to share visitor products and experiences through the lens of passionate San Diegans

CASE STUDY

North Alabama Brand Ambassadors

North Alabama, or the Alabama Mountain Lakes Tourist Association, serves to promote the sixteen-county region's natural, historic, and man-made attractions. One of its more recent initiatives, the Ambassador Program, leverages 20 individuals' abilities, talents, and media platforms to represent the region authentically.

Selected ambassadors are expected to capture the beauty of the region - its natural assets, key attractions, cultural events/festivals, and food, and share widely with their audiences. In some instances, specific assignments may also be offered to ambassadors and in return, North Alabama provides each ambassador with a suite of marketing tools (web landing page, social media features, blog features, and social media badges, etc.)



CASE STUDY

Loudoun County Tourism Ambassador Certification

The Loudoun County Tour Ambassador program teaches a mix of front-line employees and volunteers best practices to help ensure positive visitor journeys across the destination. The training and certification program helps increase participants' knowledge of the region and provides them a list of updated visitor FAQs at an initial training series. Certified ambassadors then continue to build on their skills and training through quarterly virtual Lunch & Learn events and networking events in order to renew their certification annually.

Trainings are offered at low cost to employers in the industry with a one-time application fee of \$45 per person and a \$25 annual renewal processing fee.



Expand promotion of and accessibility to destination neighborhoods

Although San Diegans generally rated the city’s urban amenities highly in a 2024 survey distributed by the San Diego Tourism Authority, public transportation remains a critical gap in quality of life for locals.

Similarly, visitors were unlikely to use public transportation as their choice mode of travel during their stay in San Diego. In fact, in 2022, only 8% of visitors to San Diego reported using public transportation and 9% reported walking as their modes of transportation during their stay compared with 51% using their own vehicle and 28% using a borrowed vehicle (whether rental/friends’ vehicle).

As such, it was unsurprising that one of the top aspirations shared amongst industry stakeholders during focus group discussions and 1-on-1 interviews held in the early phases of the planning process was to increase accessibility throughout the region, for example, “improve overall accessibility through creating walkable and ADA-accessible neighborhoods” and “help people get around the destination more easily without getting in a car”.

In order to support diverse modes of travel within San Diego and spread visitation beyond downtown, the destination needs to take a two-pronged approach of a) increasing digital visibility of and physical access to the City’s cultural districts, creative enterprise zones, and destination neighborhoods such as North Park, Convoy District, Barrio Logan, Point Loma, and La Jolla.

To date, accessibility improvements have largely been led by neighborhood associations, business improvement districts, and local groups that have initiated pilots to test alternative modes of transportation to their neighborhoods just outside of downtown, including a circulator shuttle system to North Park/City Heights and a La Jolla pilot shuttle from Balboa Park.

ACTIONS

01

Create a campaign ‘spotlighting’ San Diegan artists and chefs/restaurateurs and their iconic work and neighborhoods they represent

02

Develop a deal package in partnership with public transit agencies to support diners and explorers of the arts to ride transit - ‘ride-and-dine’ - to cultural districts, creative enterprise zones, and destination neighborhoods

03

Advocate for streetscape planning and capital improvements within key destination neighborhoods to facilitate pedestrian and micro-mobility flow

CASE STUDY

NYC Restaurant Week/ NJ Transit Partnership

NYC Tourism and NJ Transit, a regional public transit agency with services connecting New York City and New Jersey, partnered with Mastercard to offer Mastercard holders up to \$30 credits during three consecutive Restaurant Weeks in New York City. In order to be eligible for credits, diners must make the following purchases using their Mastercard, either a) \$10 statement credits with a purchase of \$45 or more at any participating restaurants or b) \$10 statement credits when \$20 or more is spent with NJ Transit.

The partnership and campaign was designed to encourage diners to use Mastercard during their participation in Restaurant Week while also increasing transit ridership, especially as post-pandemic ridership has been slow to recover.



CASE STUDY

Singapore Food Festival

Singapore Food Festival aims to celebrate the richness of Singapore's food culture and the creativity of the nation-state's culinary talents who are constantly reimagining Singaporean cuisine. Over 30 installments of the Festival, the Singapore Tourism Board has held a mix of campaigns and activations featuring local food experts and chefs and the unique cuisines/dishes they represent.

In 2022, this included a two-week, in-market Festival Village activation at Singapore's major tourism anchor, Marina Bay Sands, that gathered over 25 food and drink establishments serving familiar Singaporean dishes such as Chilli Crab and Laksa. Beyond the Village, the Singapore Food Festival has also brought brand activations out to targeted markets such as India, United Kingdom, and North America through a series of restaurant collaborations with Singaporean chefs.



Continue to position Balboa Park as the destination's cultural anchor

Balboa Park is not just a 1,200-acre historic urban park. It is also home to a 200-acre cultural district, a unique area densely packed with arts, science, history and culture organizations, artists, historic buildings, and gardens that provide a diverse range of programming throughout the year. The centrally located attraction is accessible to various audiences and should serve as the crown jewel for cultural experiences in San Diego.

While some of the cultural institutions that sit within the Cultural District compete with the likes of those in New York City, Chicago and Los Angeles, the Park's brand remains muddled amidst a complex landscape of stakeholders and governing/management entities with disparate priorities, programs, resources, and funds. Instead of a seamless and connected experience of Balboa Park, visitors are exposed to an assortment of messages and visual identities - from the Balboa Park Explorer Pass to the visitor guides designed by the Balboa Park Online Collaborative, and the countless ways in which individual museum and institution communicates about Balboa Park and what it offers or how to get there.

A unified brand for Balboa Park, including a unifying narrative and messaging platform for the park and cultural district, and visual identity, should serve to align the stakeholders across the Park and, in doing so, increase visitation and investment in the Park.

ACTIONS

01

Create a brand strategy for Balboa Park as an urban outdoor park and cultural district, and new identity to unify the cultural institutions and organizations overseeing the Park

02

Invite culinary artists to Balboa Park and create a mix of short- to long-term opportunities to reflect regional cuisines (e.g. a series of food truck events or development of anchor restaurant/hospitality concepts)

03

Develop a year-round placemaking activation strategy for the Park

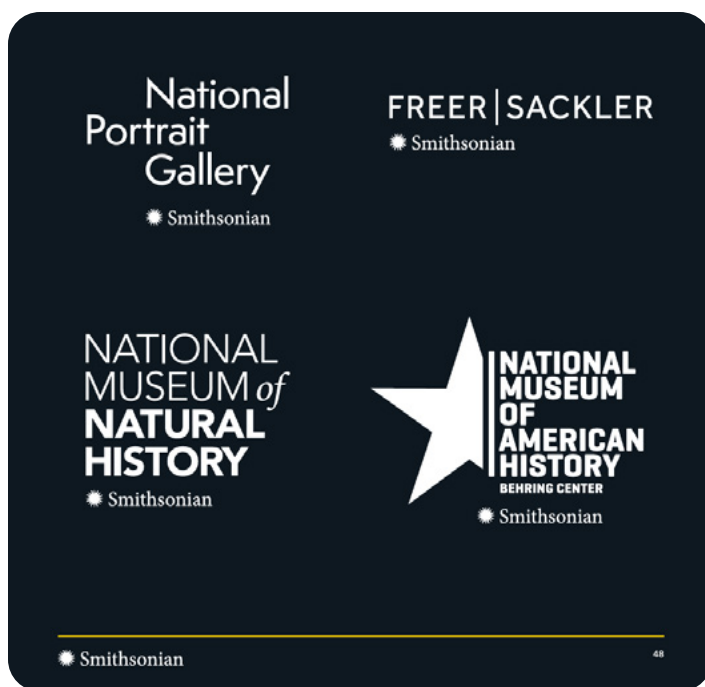
CASE STUDY

Smithsonian Institution Brand Update

In 2018, the Smithsonian undertook a brand update initiative that would enable the institution's brand to be more easily used across a variety of platforms - web/digital to print and wayfinding.

The new brand also included a visual solution that enabled co-branding with every individual museum that was part of the Smithsonian family - from the National Portrait Gallery to the Museum of Natural History.

To ensure rapid adoption, an accessible digital resource was created to enable all stakeholders to access related guides and tools to use the new Smithsonian brand across a variety of platforms.



CASE STUDY

National Galleries Scotland Rebrand

The National Galleries Scotland hosts a collection of art across three distinct sites in the City of Edinburgh. As a result, visitors could not easily recognize the connections/relatedness across the galleries.

In 2023, the National Galleries of Scotland undertook a rebranding initiative to address this challenge and with the support of brand consultants, DNCO, created a new, simplified visual identity that now carries through across each of the three galleries - the newly named: National, Portrait, and Modern. The new brand focused on making the art work within the institution more accessible and inclusive to audiences while welcoming all perspectives on the art.

The visual identity has also been pulled into a comprehensive wayfinding system that now unifies the Galleries with a unified series of floor plans, directories, directional signs and custom icon sets.





THE GREAT OUTDOORS

WHY IT MATTERS

San Diego’s strongest experience category is its outdoor activities. Given its wealth of natural resources that extend beyond the coast - from valley to the mountain and desert, the diversity of outdoor activities should also grow to reflect these terrains and include greater opportunities to be outdoors in the desert and mountains. Outdoor recreation and adventure strategies support the diversification of visitor’s abilities to engage in outdoor activities while protecting local community enjoyment of our natural assets.

Position San Diego as an ecologically diverse destination and leverage its breadth of natural assets for outdoor experiences

Among San Diego’s highest rated quality of life factors and key visitor draws is its year-round moderate climate and access to nature, parks, beaches and outdoor activities. Although 1 in 2 leisure travelers to the destination already spend time at the beach and bay to relax, there remain opportunities for San Diego to increase visitor participation in outdoor recreation, including hiking/climbing/biking, in other available natural assets throughout the region - in particular our deserts, mountains, and valleys. Currently, 12% of leisure visitors participate in hiking/climbing/biking activities while in San Diego despite only 3% rating them as important activities to consider in their decision-making processes.

ACTIONS

- 01**
Create a ‘beyond the beach’ marketing campaign focused on promoting new/existing outdoor tours and activities in the valley, mountains, and desert

- 02**
Scout and attract major outdoor (extreme) sports festival/ events that could be hosted in the valley/mountain/desert during shoulder seasons

- 03**
Create partnerships between parks/natural reserves and conference venues to encourage group adventures to natural assets

RECENT LOCAL AND GLOBAL HIGHLIGHTS



California Enduro Series (Mountain)



P3 Big Way Camp (Desert/Valley)



Dubai International Baja (Desert)



Badwater 135 Ultramarathon

Support sustainable use of natural attractions & responsible traveler behaviors

With nature (namely beaches) being the number one visitor draw to the area, it is critical for industry partners to help empower everyone - visitors and residents alike - to protect, preserve and rehabilitate San Diego's natural ecosystems for generations to come. San Diegans are proud stewards of the lands and waters of the region, but critical threats amplify the importance for residents and visitors to do more to protect San Diego's natural heritage. San Diego County has more animals and plants on the endangered species list than any other county in the U.S., and storms increase the amount of trash and sewage entering critical waterways that impact rivers, beaches and ports. Several regional destination marketing partners are leading the way in educating visitors about responsible and respectful actions, such as Coronado's "[Protect the Crown](#)" responsible visitor campaign and Visit Oceanside's "[Love O'side](#)" responsible travel platform. Although key attractions, like Balboa Park and local beaches have their own visitor education signage and materials, there is currently no destination-wide program that provides a cohesive and clear message to visitors to San Diego.

ACTIONS

-
- 01**
Develop a destination-wide multilingual responsible visitor education program including a messaging campaign and promotion toolkit to be leveraged by San Diego industry partners
-
- 02**
Integrate responsible visitor behavior messaging into the Visit San Diego website homepage, experience itineraries, articles, blog posts, signage, visitor guides, and other visitor-facing materials
-
- 03**
Partner with local event/sport venues, the port and the airport to use responsible visitor messaging as "stand-in" ad content when ad kiosks/billboards are not in use
-
- 04**
Create family-friendly materials (e.g. coloring and activity books, scavenger hunts) focused on responsible and respectful behavior principles and provide to restaurants and accommodations to distribute to families traveling with children
-
- 05**
Encourage accommodations, rental companies and outfitters to share responsible visitor messaging as part of guest communications (e.g. confirmation emails/texts, welcome statement)
-

CASE STUDY

Sonoma County Leave No Trace Coalition

Like many nature-based destinations in the height of the pandemic, Sonoma County California, saw the need to create a collaborative approach to positively educate visitors and residents about safe and responsible behaviors when visiting area parks, preserves and other outdoor recreation locations. In 2021, the [Sonoma County Leave No Trace Coalition](#) was formed as a partnership between Sonoma County Tourism, Sonoma County Regional Parks, the Leave No Trace organization and more than 60 local businesses to help mitigate growing negative environmental impacts. Receiving numerous awards, including the Green Destinations 2023 ‘Good Practice Story’ award, Destination Marketing Association of the West’s ‘Best Idea’ award, and the Sustainability Advocate Award by the CalTravel Association, the Coalition promotes seven Leave No Trace principles, and supports businesses to empowers visitors and guests through training tools, physical signs, and a digital toolkit.



CASE STUDY

Look Out for ME

Building on the efforts of the Maine Land Trust Network, the State of Maine’s Tourism Office established a comprehensive marketing campaign to encourage safe and regenerative tourism behaviors across its outdoor recreation assets.

The “Look Out for ME” campaign includes a toolkit of resources for both travelers to plan safe trips, and for other state agencies, private companies, nonprofits, and various industry stakeholders to help spread the word and distribute materials under the campaign’s themes. The industry messaging toolkit contains a suite of digital and print assets for use by partners, including the campaign logo, social media posts and images for social channels, posters, digital badge, and email templates. The breadth of resources ensured the campaign was widely distributed and activated in-market across key attractions.



Promote Existing & New Regenerative Tourism Experiences

Regenerative tourism describes intentional actions within the industry that enable visitors to not only do no harm, but also protect and enhance the destination through their experiences. The concept goes further than sustainability, with an emphasis on improving the well-being of host communities, travelers and the environment. This often takes the form of patroning locally-owned and sustainable businesses, volunteering, donating to conservation or stewardship funds or taking a visitor pledge. San Diego has a wide network of non-profit organizations who would benefit from greater synergy with the tourism industry. From rehabilitating bird habitats and conducting bird counts with the San Diego Audubon to joining a beach clean up with San Diego Coast Keepers, or enjoying a kayaking or whale-watching tour with Ocean Connectors, there are hundreds of opportunities for individual travelers, families, or corporate group to make a positive impact during their time in San Diego.

ACTIONS

01

Develop a new page on the Visit San Diego website that promotes regenerative (volunteer) tourism opportunities at major attractions, parks and beaches for visitors to participate

02

Launch a 1% For the Outdoors initiative, inviting tourism and outdoor recreation businesses to add a 1% donation to customers' bills, with an opt-out option. Funds collected will go into a Destination Stewardship Fund to enhance outdoor recreation infrastructure, signage, and support for San Diego neighborhoods.

03

Foster formal partnerships between convention/meeting organizers and local volunteer organizations to encourage responsible meeting group impact

04

Partner with tour operators and nature/culture organizers (i.e. Hike Clerb) to curate unique regenerative experiences that share the essence of San Diego's nature and diverse culture with trip participants and incorporates volunteer opportunities

05

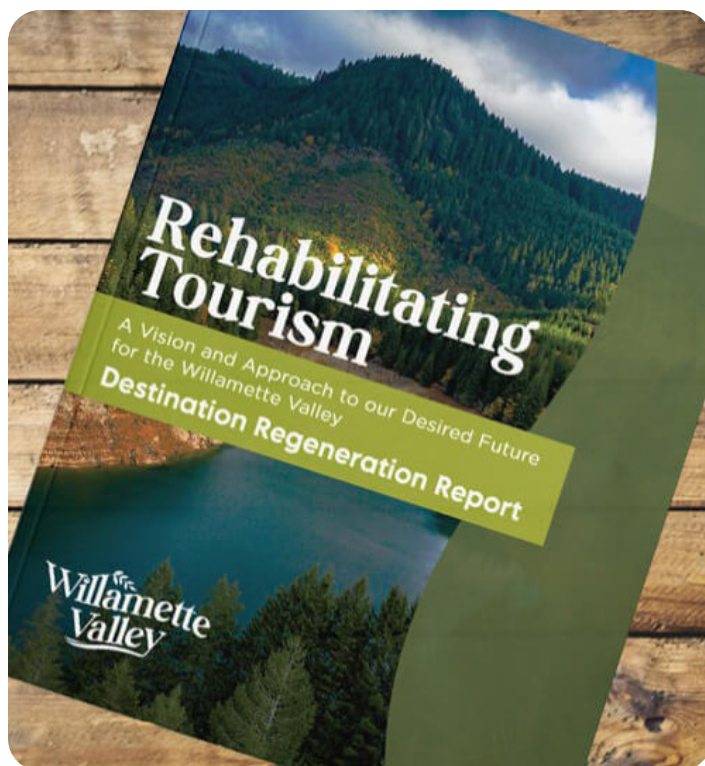
Partner with tour operators and nature/culture organizers (i.e. Hike Clerb) to curate unique regenerative experiences that share the essence of San Diego's nature and diverse culture with trip participants and incorporates volunteer opportunities

CASE STUDY

Regenerative & Sustainable Travel In The Willamette Valley

The Willamette Valley Visitors Association (WVVA) is working to ensure visitors have ample opportunities to support local communities, businesses and the environment. The WVVA promotes regenerative experiences on their visitor website through a dedicated page that describes regenerative tourism and what it means for the Willamette Valley.

To formalize their commitment, the WVVA became a partner of the Transformational Travel Council (TTC), joining a globally recognized group of conscious travel experts and change-makers to transform tourism experiences to be an instrument of good for all. In working with the TTC and other partners, WVVA is providing resources to frontline staff and tourism professionals to bring their regenerative tourism vision to life throughout the Valley.



Create & promote once-in-a-lifetime experiences in the great outdoors

Memorable experiences leave lasting impressions on visitors, making them more likely to share their stories with friends, family, and social media networks, and effectively promoting our destination organically. These moments are often characterized by authentic experiences of place - the natural wonders of the world, unique cultural immersion, and personalized services, which all cater to the growing demand for experiential travel.

By focusing on creating unforgettable and once-in-a-lifetime experiences in the great outdoors of San Diego, the destination will be able to better differentiate itself from competitors on the West Coast and foster stronger emotional connections with visitors, all while showcasing its breadth of natural assets.

ACTIONS

- 01 Host a business competition/ accelerator for tour operators, curators, and artists to develop a unique adventure product or outdoor cultural tours/ experiences
- 02 Commission photo-friendly art installations/brand activations to activate outdoor adventure assets

GLOBAL HIGHLIGHTS - FROM CULTURAL TO FAMILY-FRIENDLY ADVENTURES



The Ecology Center - Rainbow Sculpture



Prada Marfa



Seven Magic Mountains



Desert X international contemporary art exhibition



SUP Glow Night Paddle Tour



Niagara Zipline



Sydney Harbour Bridge Climb



Toro Verde Adventure Park



SPORTS, MEETINGS & EVENTS

WHY IT MATTERS

San Diego is one of the premier event destinations nationwide. Beyond its diverse venues, the year-round mild weather, scenery, and entertainment options, place San Diego among planners' top choices. In today's market, planners are less interested in a traditional ballroom setting and increasingly looking for destinations with hybrid venues that can not only offer a range of theaters and halls but accommodate a wider range of event types with upgraded technology. These structural adaptations, however, must be accompanied by seamless and convenient permitting processes that often impact shorter turnaround time for event planning today.

Support Expansion of New Events Across All Submarkets

Downtown San Diego is known as the event hub of the city, home to the San Diego Convention Center, Petco Park, the Rady Shell, and multiple large hotels. However, the popularity of events downtown also limits the number of new events these venues can accommodate.

The following table shows a breakdown of events in San Diego that occurred or are planned for 2024, by submarket. The data shows clearly that Downtown San Diego hosts the second most events of the regions listed (21%), trailing the North Coastal region outside the city limits. There is clearly a missed opportunity to bring events back into the City through its diverse neighborhoods.

NORTH COASTAL	28%
DOWNTOWN	21%
LA JOLLA	10%
MISSION BAY & BEACHES	8%
NORTH INLAND	7%
SOUTH BAY	5%
CORONADO	5%
PT LOMA PENINSULA	5%
EAST COUNTY	4%
BALBOA PARK	3%
HILLCREST	2%
NORTH & SOUTH PARK	1%

To address capacity limitations of downtown San Diego, efforts should be made to move/attract events to other neighborhoods and submarkets across the region. Featuring event venues outside Downtown San Diego and popularizing the venues in Balboa Park, Mission Beach, and Mission Valley will increase the number of events that can occur in San Diego. Increased visibility of other parts of the city can also broaden the appeal of San Diego as a multi-faceted events destination.

ACTIONS

01

Create a comprehensive inventory of available venues by submarket that can support meeting & groups, including an understanding of min./max. capacity, available technology, on-site amenities and services, recent event highlights, and surrounding entertainment options for attendees

02

Create marketing materials for each sub-market to attract new events, meetings

03

Within existing sales/marketing groups, identify sub-market liaisons who will manage meeting/group requests specific to the submarket, oversee updates to the venues inventory, and lead coordination with local reps/community groups

04

Develop creative incentive packages to attract events that are considering non-traditional venues across San Diego

Support New Event Planners & Promoters By Identifying Issues/ Barriers and Provide Educational Resources

Planning an event in San Diego can be complicated, and while experienced event planners who have worked in the city before are able to navigate the process, those who are less experienced struggle with the layers of restrictions and clearances needed to host an event - from both the City and County authorities.

Simplifying this process will make it easier for event planners to host events and attract new visitors and tourists to San Diego, particularly during shoulder seasons where opportunities prevail to increase the occupancy of hotels across key submarkets. In addition to simplifying the event approval process, providing seminars will help educate event planners on the requirements needed to host an event.

ACTIONS

01

Appoint a single point of contact to provide guidance to new event planners on City and County regulatory/ permitting processes

02

Design an event planner training seminar to be hosted/ facilitated annually

03

In partnership with local neighborhood organizations, chambers, and regional destination marketing organizations, create a one-stop series of user-friendly San Diego event planner guides for new planners entering the market

04

Form an advisory policy group/committee to advance city- and county-level policy changes to ensure a more business-friendly process

CASE STUDY

San Francisco Special Events Steering Committee

Prior to COVID, San Francisco had required event planners to get permits from up to eight different city agencies and lacked a central event calendar for these events. To address this issue, the City created a master event calendar that organized the special events and provided a central source of information. They also issued a guide for outdoor event planning and permitting, which was an online educational resource for event planners to use to produce safer and more successful events. In 2019, San Francisco Mayor London Breed issued an executive directive to streamline the event permitting process and created a Special Events Steering Committee to review and improve interagency communication and collaboration.



CASE STUDY

NYCEDC North Shore Entertainment & Amusement Site Development Process

As part of New York City’s implementation of the Staten Island North Shore Action Plan, the City released an RFP seeking proposals from developers/operators to create a “premier recreational destination for the region with entertainment, amusement, and retail uses” on an 8-acre site.

Ahead of releasing the development RFP, the City had laid the groundwork by ensuring the site received land use approvals in 2015 for entertainment and amusement uses. Furthermore, nearly \$200 million of construction work was invested by the City on the site to develop a 820-space mechanically vented parking garage that would enable the development to meet parking requirements, as well as complete a 70,000-SF terminal building designed to support exhibit areas, entertainment, food service, and retail.



Develop A Next-Generation Multi-Purpose Event Venue

Entertainment venues are changing, with increased emphasis on flexibility and advanced technology to meet complicated show needs and increase the types of events that can be hosted.

Currently, San Diego lacks a new entertainment venue of this type, with a combination of older theaters and outdoor amphitheaters. A dedicated multipurpose event venue would give San Diego a new tourism asset that is unique to the market and would offer a different type of experience to tourists and locals alike.

ACTIONS

01

In coordination with the City, identify sites appropriate for the new venue within the Civic District plan

02

Test development concepts through market research and case studies

03

Assess private developer interest through RFP process and identify appropriate development partner/joint venture

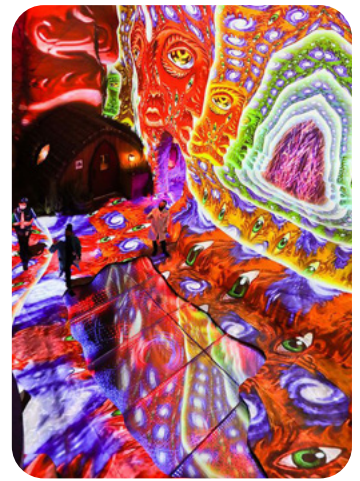
04

Create and promote available public regulatory incentives (e.g. expedited permit approval process, payment-in-lieu-of-taxes, etc.)

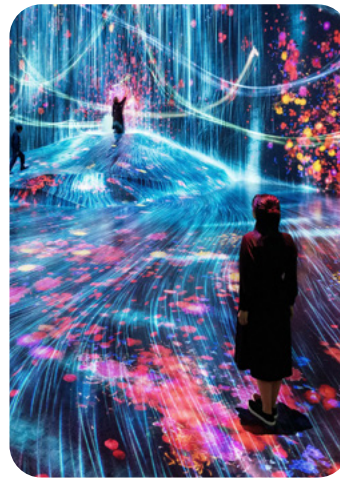
RECENT LOCAL AND GLOBAL HIGHLIGHTS



ABBA Arena



Meow Wolf



TeamLab



Perelman Performing Arts Center

Pursue Convention Center Expansion

In the long term, maintaining its status as one of the country's premier convention centers requires the San Diego Convention Center ("SDCC") to expand. However, ongoing legal challenges currently prevent further exploration of expansion options. Once these hurdles are overcome, the expansion of the SDCC should become a primary goal to enhance tourism in San Diego. The larger events, like Comic-Con, are already utilizing additional space at

Petco Park and the Rady Shell due to venue limitations, a temporary measure that leverages San Diego's popularity as a destination. Nevertheless, this strategy is not sustainable. Other competitive destinations like Seattle, Las Vegas, Anaheim, and Austin have completed recent expansions or are in the process of expanding. San Diego, and the SDCC, risks falling behind its competitors.





MOBILITY

WHY IT MATTERS

Through the community survey, San Diegans voiced concerns around traffic congestion to/from coastal assets and near the downtown area as one tangible way that tourism negatively impacts their life. To address the impacts that traffic congestion has not only on quality of life but environmental sustainability, leading destinations around the world are increasingly investing in multi-modal transportation systems that reduce reliance on private vehicles. With so many significant projects planned and underway - from electrification initiatives to regional bike connectivity, San Diego is well positioned to similarly enhance the way that visitors move around the destination in a sustainable manner.

Encourage industry employees to use alternative transportation

Several psychological theories suggest that people learn behaviors through the observation of others or are more easily influenced by the behaviors of others around them. Likewise, in travel, visitors are more likely to take cues from the behavior of locals - whether in the way they treat their natural assets (beaches and hiking trails), or the way they get around the destination.

In order for San Diego to truly be able to encourage an increased uptake amongst visitors of public transportation and other alternative modes of transportation, locals will need to demonstrate the viability and convenience of these alternatives - whether by trolleys, buses, or bikes. In particular, frontline hospitality workers and other employees of the industry should take the first step to shift travel behaviors and demonstrate a commitment to sustainable travel in order to get visitors to start adopting this behavior as well.

Fortunately, the City and SANDAG have a variety of tools and resources that can support employers in the industry to shift their employers' travel behaviors, including:

- a) [MTS' Employer and Business Partner Programs](#) offers pre-tax or discounted transit passes as a benefit to employees;
- b) [SANDAG's 'Try Transit' Commuter program](#), a joint effort with MTS and North County Transit District, provides eligible employees with a one-month pass to try available transit options—bus, train, or Trolley;
- c) [SANDAG's Bike Anywhere campaign](#) is a free, annual event that encourages employees to bike to work, with rewards and benefits offered to participants;
- d) [City of San Diego's bike parking program](#) installs bike racks in the public right-of-way for businesses to encourage employees to bike to work. City bike racks, installation and maintenance are provided by the City at no cost to businesses.

ACTIONS

- 01**
Pilot a tourism industry 'bike to work' campaign during key event seasons
- 02**
Partner with MTS to create employer-funded transportation benefits packages
- 03**
Create incentives for employers to provide bike and electric vehicle infrastructure on-site
- 04**
Create and promote available public regulatory incentives (e.g. expedited permit approval process, payment-in-lieu-of-taxes, etc.)

Educate visitors on multi-modal transportation options across the region

From rapid bus services to trolleys and electric circulators, San Diego offers a good mix of available multi-modal transportation services year-round. In addition, a suite of pipeline projects and investments suggest regional connectivity will further improve in the coming years with expanded rail routes and planned bus routes. However, in order to ensure that these services are adopted and used by visitors, the destination will need to raise awareness and educate visitors through strong marketing campaigns and with the support of industry stakeholders and frontline employees who interact daily with visitors.

Education should focus on:

- a) The comprehensiveness of alternative modes beyond personal vehicle use, such as public transit (rail, trolley, bus), cycling, walking, circulator shuttles, and electric scooters;
- b) Addressing any perceived barriers to adoption and clarifying any misconceptions about modes of transportation;
- c) The benefits of using diverse transportation modes such as reducing traffic congestion cost savings, etc. to motivate sustainable choices.

ACTIONS

01

Create a visitor-focused, multi-modal transportation campaign (incl. activations at the airport, hotels, key attractions)

02

Build partnerships between meeting/convention organizers and transit agencies to raise attendee awareness of transit options

03

Pilot and market car-free trail/beach days and low-cost shuttles in partnership with parks services

CASE STUDY

Heathrow Express

The Heathrow Express, the airport rail link operating between London Heathrow Airport and London Paddington rail/tube station provides up to 150 services a day, with connections lasting no longer than 20 minutes each way.

In its 25 years of service, a variety of marketing campaigns have been run to promote the service to travelers. In one example, the 'Tracks' 6-month campaign included out-of-home visual advertising positioned in the walkway between Heathrow Airport Terminals 2 and 3 to persuade visitors making transfers to use the service and features the message: 'Connecting London with the World: The fastest way from Heathrow Central to London Paddington.'



CASE STUDY

Joshua Tree RoadRunner Shuttle Service

In 2018-2019, the Joshua Tree National Park and regional Morongo Basin Transit Authority offered a free shuttle service to all Park Pass holders during peak seasons of Fall/Spring.

The two-year funded pilot program, specifically geared toward regular hikers and campers, offered services throughout the northern section of the park throughout the day from 8am to 8:30 pm with stops including key scenic viewpoints and/or activity areas such as the Hidden Valley, Ryan Mountain and Barker Dam. Visitors had the option of boarding the shuttle at either Joshua Tree or Oasis Visitors Center.



Prioritize Accessibility Improvements Across The Destination

San Diego is one of the most accessible cities in the U.S., making it an ideal destination for travelers of all abilities. With accessible public transportation, specialized resources, and services, the city strives to ensure effective travel between the airport, downtown, beaches, parks, and attractions. However, there are still opportunities for advancement, including enhancements to existing communications around ADA-accessible sites and experiences, as well as neighborhood streetscape improvements, particularly in destination neighborhoods outside of downtown.

A 2022 MMGY Global report highlights that “travelers with mobility disabilities spend approximately \$58.2 billion annually” on travel and take leisure trips nearly as frequently as those without mobility issues. In addition, MMGY estimates the number of people with disabilities globally will reach 33.4 million by 2028. As such, it is critical for the destination to quickly address the growing needs of travelers with different abilities in partnership with its neighborhood/local partners.

ACTIONS

01

Advocate for funding and prioritization of complete streets improvements, bike infrastructure improvements, and other infrastructure projects to address accessibility gaps to/within destination neighborhoods

02

Expand existing content on Visit San Diego website to include full ADA-accessible listings and more detailed descriptions about accessibility features at popular attractions and outdoor spaces

03

Create a simple platform for industry stakeholders to add information about how their business, site or assets are accessible so this can be funneled upwards and communicated to visitors

04

Partner with experts in accessibility for travel and tourism (i.e., Wheel the World) to identify gaps, improve visitor information, and increase promotions of accessible accommodations, attractions and services in San Diego

05

Sponsor accessibility influencers to visit popular and emerging San Diego attractions, recreation spaces and neighborhoods to conduct accessibility assessments with travelers in mind; encourage local community and tourism leaders to participate in the assessments to learn first-hand what gaps need to be addressed

CASE STUDY

Accessible Colorado Springs

Visit Colorado Springs has significantly improved accessibility for visitors and the local community by enhancing both communications and infrastructure. They provide detailed accessibility information through their Accessible COS page, which includes guides on accessible attractions, accommodations, and transportation options. Additionally, they have made strides in infrastructure improvements, such as installing ramps, ensuring ADA-compliant facilities, and enhancing signage to aid navigation for individuals with disabilities. These efforts collectively enhance the travel experience and ensure inclusivity for all visitors and residents. For more details, visit their [Accessible COS page](#).





BUSINESS & WORKFORCE DEVELOPMENT

WHY IT MATTERS

In 2022, 214,000 jobs were supported by tourism dollars in the region. Despite the scale and diversity of jobs, the industry continues to face challenges in attraction and retention, much like other destinations across the State of California. In particular, housing affordability for workers in the service industry remains a critical challenge, as well as inequitable access to business development support amongst diverse, immigrant communities, and limited professional training and development services/programs to support career advancement in tourism and hospitality.

Support development of workforce housing

According to a 2024 Housing Affordability Index, only 1 in 10 residents in San Diego County can afford a median-priced home (\$911,500 in Dec 2023) and over half of the county’s renters (58%) are housing-burdened, or paying over 30% of their income on housing. Furthermore, the County has only met 9% of housing needs (as determined by the State’s Regional Housing Needs Allocation) for communities with very low, low, or moderate incomes, of which a share are tourism and hospitality industry workers.

Over the course of stakeholder engagement, a variety of representatives from the lodging association, local universities/colleges, and major industry employers shared their concern for the lack of accessible housing supply for workers - in particular, many raised concerns over the missing middle housing, whether Single Room Occupancy units or workforce housing.

While individual action by employers such as UCSD and a number of restaurant and farm owners in Oceanside is important, the industry needs to rally around policy change or legislation and development incentives to support the construction of various types of housing built more densely around amenities and transportation hubs with easy access to employment centers.

ACTIONS

01

Advocate for workforce housing development incentives (incl. tax and/or regulatory incentives, land agreements, etc.)

02

Build partnerships between non-profit housing developers and industry employers

03

Pilot a housing/rental assistance program for industry employees

CASE STUDY

Town of Whistler's Workforce Housing Program

The Town of Whistler continues to meet and exceed its goal of housing a minimum of 75% of its workforce locally, within municipal boundaries.

Over the last 25 years, the municipality's subsidiary organization, Whistler Housing Authority, has implemented a number of policies including an employee service charge that requires every new commercial/ industrial development contribute to employee housing in 3 ways -1) building staff housing at their own establishments/sites, 2) purchase off-site housing for employees within the municipality boundary, and 3) paying cash-in-lieu to the municipality. The fees go toward a municipal housing fund that enables the Town to build workforce housing. Today, the Whistler Housing Authority provides 7,000+ employee housing beds that are affordable and restricted to people working in Whistler, of which about 50% are rental and 50% owned units.



CASE STUDY

Greenville's Tourism Workforce Housing Development

In 2023, following State legislation changes allowing cities to use a portion of accommodation tax revenue for workforce housing, the City of Greenville leveraged their new tool to spend nearly \$1,000,000 of tourism revenues from hospitality and accommodations tax to purchase a 2-acre lot to create affordable housing options for the local workforce.

The site purchased, located close to several other workforce housing projects underway, would allow the development of an up to 3-storey housing developing with 50-60 housing units - for rent or for sale. The City will be releasing an RFP to select a developer for the site.



Develop industry-specific workforce training opportunities

“Hiring has never been this difficult”, according to stakeholders in the hospitality industry engaged through the stewardship planning process, In particular, the industry continues to suffer from turnover in specific sectors. In 2022, the turnover rate in the arts, entertainment, and recreation industry was 107%; in accommodation and food services it was 102%. This trend seems likely to continue as 67% of survey respondents to a 2022 Labor Survey distributed by the San Diego Tourism Authority indicated that they are likely or extremely likely to leave their current job within the next year (albeit staying within the travel industry/sector).

In particular, stakeholders shared that the lack of training and professional development programs remains a critical gap to helping employees in the industry build career pathways. Others also shared that employees in the industry are hungry for growth opportunities but often require ongoing soft skill training to advance in the industry.

At this time, regional workforce development entities have available funding and resources to support the creation of industry-specific training programs and are ready to mobilize with the support of the SD Tourism Authority, SD Restaurant Association, and Lodging Association.

ACTIONS

-
- 01** Partner with local universities/colleges to develop and provide low-cost customer service/ hospitality excellence training programs

 - 02** Create a bi-cultural/bilingual hospitality student exchange program to ensure that hospitality service standards are comparable between San Diego and the greater Baja region

 - 03** Partner with local Small Business Development Centers to create tourism industry-specific entrepreneurship programs to support growth of small and local business in the tourism and hospitality industry

Create a unified campaign to attract/retain hospitality workforce

Not many people realize that of the 214,000 local jobs supported by tourism dollars, only about 110,000 are leisure and hospitality jobs. The other 100,000-plus jobs are found in industries as diverse as transportation, information, legal, finance, insurance, and real estate. This and many other realities about the jobs and occupations in the industry need to be clearly communicated and marketed to ensure a robust and continuous pipeline of labor.

Currently, hiring campaigns are executed on an ad-hoc basis by individual employers, whether hotels or major attractions, without a unifying approach to attracting and retaining quality workers.

A single, organized, and ongoing recruitment campaign that speaks to the myriad opportunities and career pathways available in tourism is much needed to change perceptions around jobs in the industry and to ensure San Diego remains a competitive destination.

ACTIONS

01

Form a marketing coalition to raise funding and resources for campaign

02

Set hiring/recruitment targets for campaign

03

Recruit a creative and marketing agency to develop strategy and creative assets for use by all coalition members

04

Develop a workforce marketing campaign for San Diego Tourism (including a central bilingual job board and website, out-of-home advertising, social media, etc.)

CASE STUDY

#risefastworkyoung

A collaborative of investors consisting of UK-based businesses such as hospitality group, Hawksmoor, and The Athenaeum Hotel & Residences and Hilton Hotels & Resorts, pledged £10 per employee toward a marketing campaign budget to change the perception of the hospitality industry and support worker attraction and retention. In its first year, the collaborative raised over £900,000.

The campaign, “Rise Fast, Work Young” is built on the position that “Hospitality is never boring and it offers faster career progression opportunities than almost any other industry”. The first year campaign was targeted at workers under the age of 30 (entry-level employees) and features a job board/website, out-of-home advertising locations at large entertainment venues, digital advertising with national media, and social media content, primarily on TikTok and Instagram.



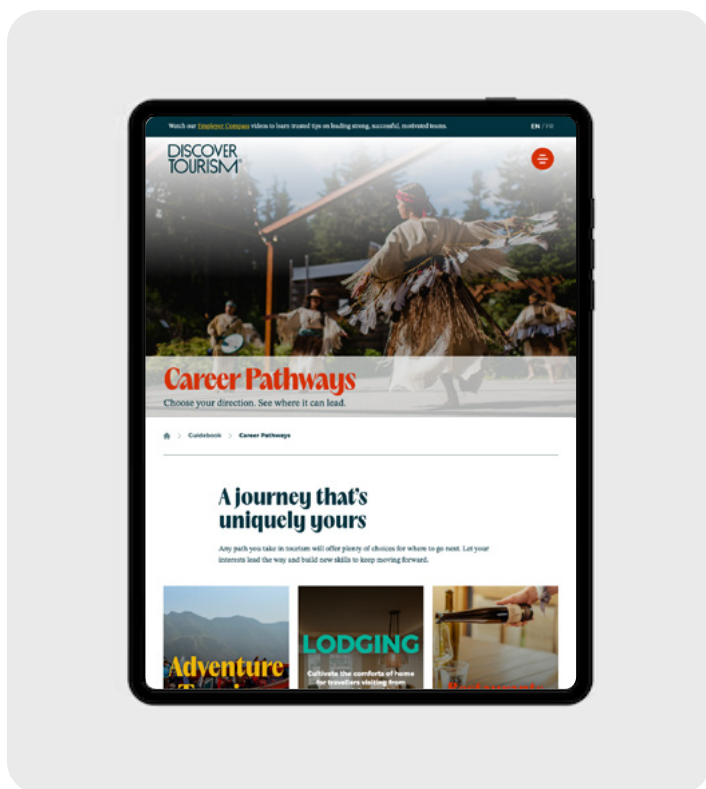
CASE STUDY

Discover Tourism Canada

Discover Tourism is a nationwide job resource hub for tourism professionals and new professionals looking to join the tourism industry.

The recruitment campaign was designed post-COVID to help shift the perception of careers across various industry sectors, and includes:

- Interactive career map that helps interested workers to explore various types of tourism jobs across Canada - helping them understand what the skills/experiences/education might be needed, what the day-to-day looks like;
- Featured Stories (video) from industry pros across different sectors
- Interactive quizzes to match interested applicants to new careers and industries based on their education, credentials, and experience



Support good employers and celebrate innovative & competitive employment initiatives

According to San Diego Tourism Authority's 2022 Labor survey of more than 500 tourism workers, 89% of respondents said they were either satisfied or completely satisfied with their earnings. However, earnings are only one factor in job selection processes. These days, employees are weighing a wider range of employment benefits in their decision-making processes - from hybrid/flexible work arrangements to flexible health savings, sign-on bonuses, gym membership credits, and subsidized child care services.

As such, strong workforce retention in the tourism and hospitality industry requires a variety of strategies that focus on improving job satisfaction, work-life balance, and overall employee engagement, and it often starts with individual employers.

ACTIONS

01

Provide incentives to industry employers for self-initiated professional development initiatives and childcare/personal wellbeing programs (incl. sponsorships for trainings/seminars, program marketing, etc.)

02

Enhance connections between workforce development organizations' resources and employers in the industry

03

Give industry recognition to leading professional development and employee wellbeing programs

Dedicate Internal Resources & Funding For DEI Initiatives

One of the key objectives of this stewardship plan is to encourage destination development that maximizes diversity, equity, and inclusion for all visitors and the workforce within the tourism industry. The SDTA and industry partners have made impressive advancements to support and celebrate San Diego's diverse cultures and create greater equity and inclusion. The Visit San Diego proudly features a comprehensive LGBTQ+ Travel Guide including recommendations for welcoming neighborhoods, dining, nightlife, outdoor recreation, accommodations, special events, weddings and the San Diego LGBTQ+ Community Center in Hillcrest. The SDTA hired their first-ever Director of Diversity, Equity & Inclusion and Community Engagement who continues to advance implementation of recommendations from the Tourism Diversity Matters assessment, and who manages the SDTA's award-winning Tourism Accelerator program, which helps San Diego-area businesses owned by women, veterans, people of color and LGBTQIA+ community members expand their operations. These efforts are an excellent foundation to build on for industry leaders to continue to expand opportunities for more inclusion of all San Diegans and greater equity throughout the destination.

ACTIONS

-
- 01**
Expand the Tourism Accelerator Program to include more businesses in future cohorts and to support ongoing networking and collaboration amongst program graduates

 - 02**
Advocate for a portion of lodging tax revenue to be set aside for a grant program that funds DEI initiatives spearheaded by San Diego tourism businesses and organizations

 - 03**
Create a resource toolkit based on lessons learned through the Accelerator Program and share widely through the industry

 - 04**
Host regular online and in-person education and engagement meetings to convene tourism industry stakeholders, fostering a social network that enables more discussion and collaboration for DEI initiative opportunities

 - 05**
Conduct a supply chain assessment of local tourism industry goods and services providers to identify gaps in diversity and equity and create opportunities for businesses to source more goods and services from local and diverse vendors.

CASE STUDY

Visit Philadelphia's PHL Diversity & Philadelphia Pledge

Philadelphia, as a destination, has implemented numerous programs and made significant investments to promote DEI. In addition to its “Black Travel Initiative” which highlights African American cultural heritage and businesses, the Philadelphia Convention and Visitors Bureau established the “PHL Diversity” division, which focuses on attracting diverse conventions and meetings to the city, fostering an inclusive atmosphere for international and multicultural groups. Additionally, initiatives like the “Philadelphia Pledge” encourages local tourism-related businesses to adopt DEI practices actively. These efforts are complemented by the city’s investment in cultural events such as the Philadelphia Latino Film Festival and the Odunde Festival, which celebrate the rich diversity of the city’s population. These initiatives and investments underscore Philadelphia’s leadership in integrating DEI principles into its tourism industry, ensuring that all visitors feel valued and included.





DESTINATION GOVERNANCE & MANAGEMENT

WHY IT MATTERS

San Diego's tourism industry leaders have an impressive track record of initiatives aimed at sustainably managing the city's natural and cultural resources, ensuring they can be enjoyed by visitors and residents for generations to come. As travel continues to evolve, these leaders are expanding their mandates to include holistic stewardship in tourism development, management, and promotion. This expanded responsibility necessitates a unified framework for leadership, collaboration, and coordination that will enable industry partners to more effectively tackle the challenges and opportunities that affect San Diego but also set a benchmark for responsible tourism.

Establish A Destination Stewardship Council

To help direct the outcomes of the stewardship plan, the SDTA has established a diverse steering committee that has the potential to evolve into a formalized Destination Stewardship Council.

To best advance a broad and long-term stewardship and sustainability agenda, it is recommended the destination form an effective organization, department, group, body, or committee, that is diverse and representative of industry and community stakeholders, and is responsible for a coordinated approach to destination-wide tourism development, management, and promotion. This group should convene stakeholders from the public, private, and civic sectors to collaboratively address destination priorities such as community development, resident quality of life, visitor use management, natural and cultural heritage, environmental conservation, and equitable access for all.

ACTIONS

01

Design a Destination Stewardship Council framework/strategic plan, including the council's purpose, representation, roles and responsibilities, and meeting protocols aligned with industry needs and leadership capacity

02

Establish a formal process to recruit and seat a diverse inaugural set of members to serve on the council

03

Host facilitated council onboarding and strategic planning sessions

04

Identify lead staff person (new/existing) at SDTA to support the organization of council meetings, communications and management as part of year-round role and responsibility

CASE STUDY

Lake Tahoe Destination Stewardship Council (LTDSC)

The LTDSC was formed to address the unique environmental, cultural, and economic challenges of the Lake Tahoe region. The Council brings together diverse stakeholders including government agencies, local businesses, community organizations, and environmental groups.



CASE STUDY

Los Angeles Tourism Cabinet

A Municipality Led Approach

In 2022, Mayor Eric Garcetti signed an executive directive to create the city's first ever Tourism Cabinet to support tourism and hospitality sector growth in Los Angeles ahead of the 2028 Olympic Games.

The cabinet consists of general managers of City and county departments to ensure city-wide collaboration, as well as appointed private sector leaders. Among the key directives of the Cabinet is to oversee the implementation of the City's Tourism Master Plan, which identified priorities for the city to close gaps and inefficiencies in its approach to tourism, and to monitor progress and performance against the Tourism Master Plan and adjusting implementation accordingly.

The executive director of the Los Angeles Tourism Department serves as the cabinet's chair and the City's chief tourism officer.



Create A Comprehensive Visitor Impact Monitoring & Management System

The SDTA excels at tracking and reporting economic impact and visitor volume data. The SDTA also regularly monitors visitor satisfaction but has yet to include questions related to sustainability satisfaction beyond cleanliness, safety and quality of the outdoor environment. Other destination stakeholders, such as the City of San Diego, monitor socio-cultural and environmental indicators, but there is no holistic system that aggregates the comprehensive data and interprets the full scope of impacts, specifically as it relates to tourism. A comprehensive visitor impact monitoring and management system should be established to coordinate the collection of data to monitor, evaluate, manage, and respond to socioeconomic, cultural, and environmental impacts and issues arising from tourism. Monitoring should be conducted on a scheduled basis appropriate to the destination and outcomes publicly reported. Findings from regular monitoring should be reviewed on a regular basis by the Destination Stewardship Council to inform priorities for investments of resources.

ACTIONS

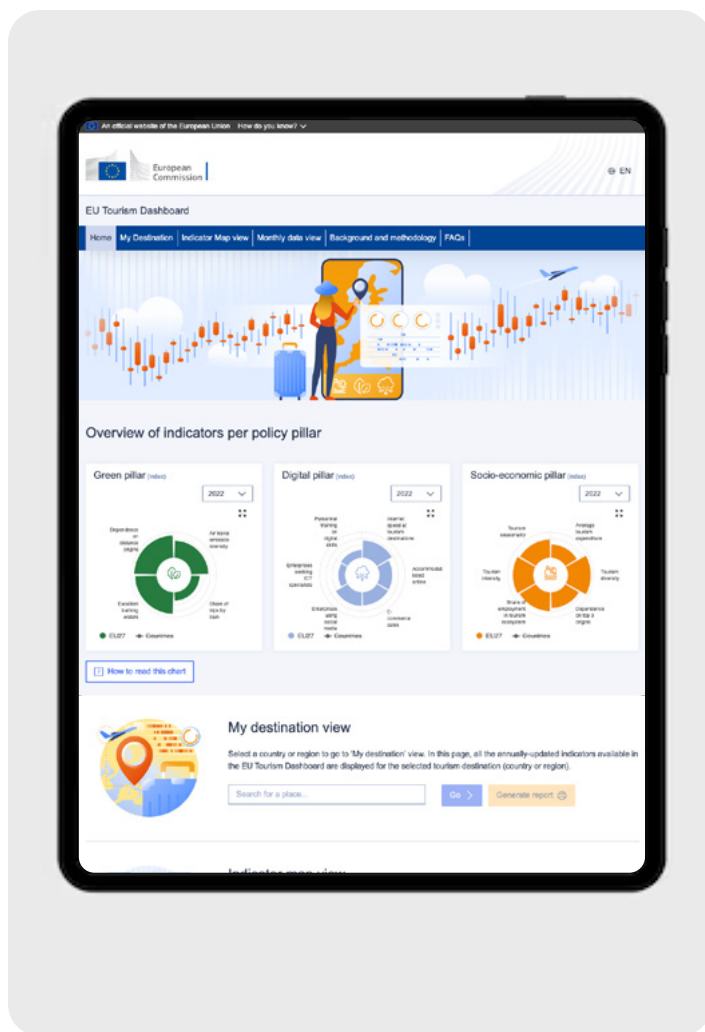
- 01**
Conduct a carrying capacity assessment to establish a baseline understanding of San Diego's natural and cultural limits for visitation
- 02**
Create a visitor impact monitoring system/dashboard that measures key economic, environmental, social and cultural impacts defined by industry leadership and informed by diverse stakeholder groups; priority should be made for indicators where data already exists and can easily be sourced and evaluated
- 03**
Establish a process and platform to provide consistent reporting on tourism impact indicators
- 04**
Host an annual meeting open to all tourism industry stakeholders to provide a state of tourism report and facilitate stakeholder discussions to advance initiatives that address destination-wide priorities

EU Tourism Dashboard

The EU Tourism Dashboard is a digital platform developed by the European Commission for its member nation-states to promote and monitor progress in achieving key policy pillars such as (1) green and digital transitions and (2) socio-economic resilience.

Although the dashboard is a publicly-available tool, the target audience of the platform are decision makers and tourism operators who can help steward local policies and strategies in the tourism industry. In addition to creating country/regional profiles, the dashboard enables countries to benchmark their performance across 19 indicators that fall under three policy pillars: Green pillar, Digital pillar, and Socio-economic pillar. Members are also able to track progress of each destination over time in relation to the policy pillars with data series showing the years from 2019 (or the closest year available) to the most recent year available.

The indicators developed for the dashboard were constructed based on data and statistics collected from available trusted sources across nations and the EU, including EuroStat, or the US Equivalent of the United States Census Bureau, UNESCO, TripAdvisor, and individual business entities managing tourism accommodation, among others.



Support & Celebrate Sustainability Initiatives In The Industry

Sustainability is deeply ingrained in San Diego’s identity. Both local businesses and residents are dedicated to preserving the area’s natural beauty and rich cultural heritage. Despite this commitment, the tourism sector lacks a comprehensive, destination-wide program that offers resources, training, or learning opportunities to help tourism businesses enhance their sustainability efforts. For instance, while the updated San Diego Climate Action Plan suggests various actions for businesses and individuals to support climate goals, it does not provide specific guidance tailored for tourism entities to minimize their environmental footprint. Existing groups like BLocal San Diego and the Port of San Diego Green Business Network offer valuable support, but there remains a significant opportunity for industry leaders to better utilize these and other business sustainability programs to deliver targeted assistance to the tourism sector.

As San Diego continues to prioritize destination stewardship, it is crucial for the SDTA and industry partners to amplify the city’s unique sustainability narrative. Tourism stakeholders are eager to share their initiatives related to sustainability, diversity, equity, inclusion, and accessibility. Effective messaging could focus on promoting regenerative experiences, educating visitors, and highlighting sustainable business practices, showcasing San Diego as a model for responsible tourism.

ACTIONS

-
- 01** Offer marketing incentives to tourism businesses that successfully participate in existing sustainable business programs

 - 02** Create a tourism industry program/manual aligned with the San Diego Climate Action Plan

 - 03** Develop resources and webinars to educate tourism stakeholders about priority regulatory requirements and available resources to meet sustainability standards

 - 04** Celebrate tourism business sustainability success in campaigns, media and events

 - 05** Create a destination stewardship recognition program to celebrate industry high performers

CASE STUDY

Visit Scotland's Responsible Tourism Program

The VisitScotland Responsible Tourism Program exemplifies a destination-led approach to sustainable tourism, designed to support and inspire tourism businesses across Scotland in adopting responsible practices. This comprehensive program provides a wealth of resources, including guidelines, toolkits, and best practice case studies, to assist businesses in minimizing their environmental impact and enhancing their social responsibility. Central to the program is the Green Tourism Accreditation, which offers certification to businesses that meet rigorous sustainability standards, covering aspects such as energy efficiency, waste reduction, and support for local communities. VisitScotland also promotes responsible tourism through initiatives that encourage businesses to integrate sustainability into their core operations, aligning with Scotland's national tourism strategy.





San Diego[®]

TOURISM AUTHORITY