Destination Performance Assessment

# SAN DIEGO 10-YEAR TOURISM STEWARDSHIP PLAN

March 2024

San Diego®

TOURISM AUTHORITY

# CONTENTS

# PROJECT INTRODUCTION

# OBJECTIVES

In Q4 2023, the San Diego Tourism Authority ("Tourism Authority") embarked on a process of developing an updated 10-Year Tourism Stewardship Plan to guide post-pandemic recovery and to ensure a more resilient, sustainable, and equitable future for the community.

The following key objectives were identified by the Tourism Authority to guide the process, approach, and outcomes of the planning process:

## 1. BOTTOM-UP

Develop a strategy that is informed by feedback from stakeholders, including San Diego's year-round residents, and that mitigates negative impacts of tourism on local communities.

## 2. TRENDS & DATA-DRIVEN

Evaluate the new industry landscape & trends that will likely shape the future of tourism in San Diego.

## 3. SUSTAINABLE

Establish a sustainable tourism roadmap to support safe, clean, and responsibly managed destinations.

## 4. DEI

Encourage destination development that maximizes diversity, equity, and inclusion for all visitors and the workforce within the tourism industry.

# APPROACH & TIMELINE

In October 2023, the consultant team led by Resonance Consultancy, and comprising HVS, Tourism Impact Services, Tourism Diversity Matters, embarked on a year-long, 6-phase process.

**OCT-NOV 2023 - COMPLETE**
**PHASE 01 - MARKET & TREND ANALYSIS**
1.1 Project Set Up
1.2 Strategic Review & Site Visit (3-day)

**NOV 2023-MAR 2024 - COMPLETE**
**PHASE 02 - COMMUNITY & STAKEHOLDER ASPIRATIONS**
2.1 Community Survey
2.2 Stakeholder Engagement

**JAN-MAR 2024 - COMPLETE**
**PHASE 03 - MARKET & TREND ANALYSIS**
3.1 Industry Trends Analysis
3.2 Visitor Survey Review
3.3 Prioritization Workshop

**JAN-MAR 2024 - COMPLETE**
**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 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

This report is an important milestone in the project timeline that provides a snapshot of where we are today as a tourism industry and destination, and includes a summary of market data, product audit, and stakeholder perceptions and resident sentiment. The report will also identify gaps in the destination's product offerings that will need to be addressed in the master plan.

# A BOTTOM-UP PROCESS

The successful implementation of a tourism stewardship plan is contingent upon the support and participation of local and regional leaders, industry partners, as well as year-round resident communities. As such, understanding the perceptions of the local community with respect to how San Diego is positioned as a destination to live, work and play is a critical component of the process.
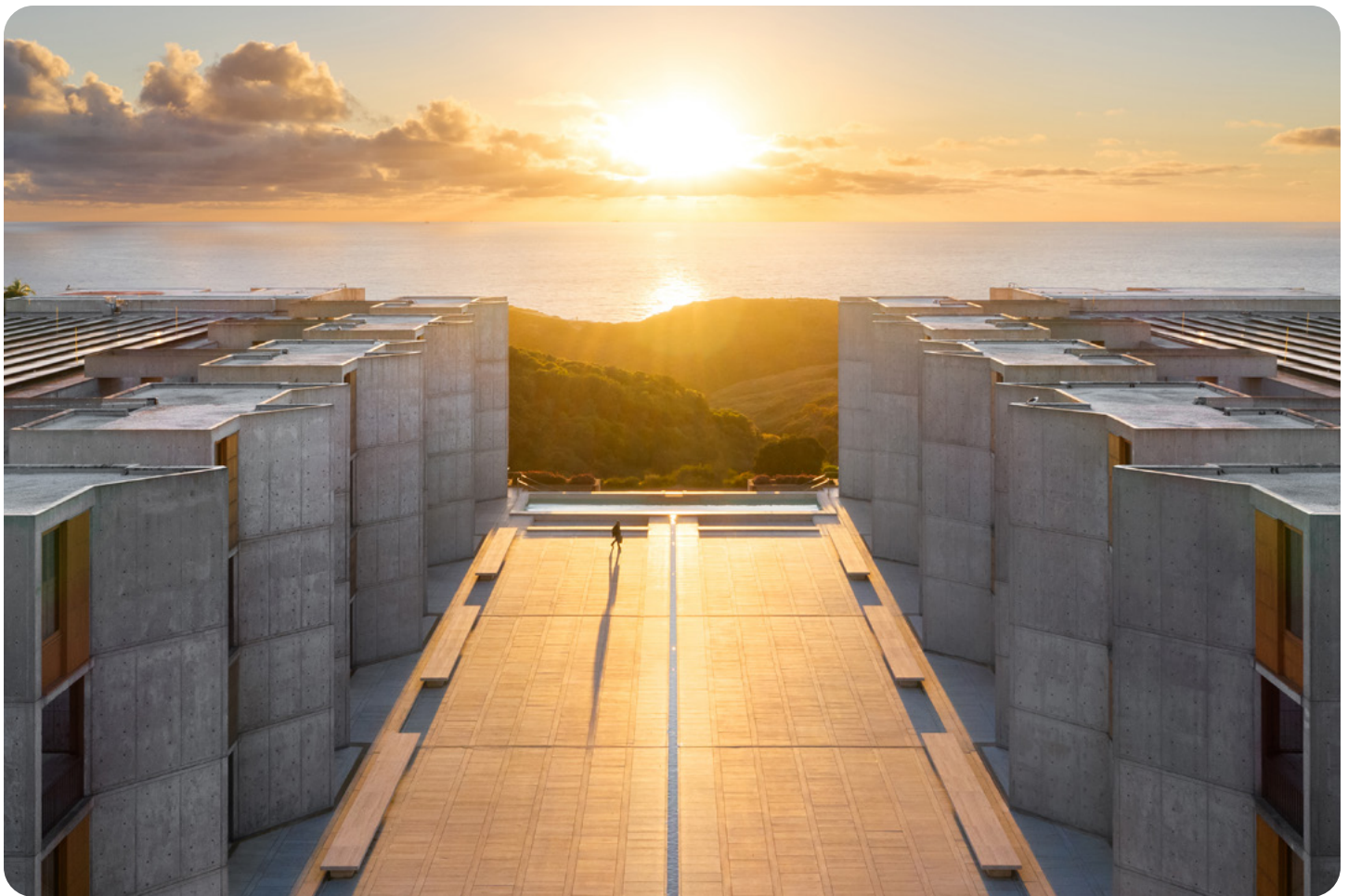
## Community Survey

The consultant team developed an online survey to identify and gauge residents' perceptions on a variety of key issues with respect to livability, culture, economy, and sense of place. The survey was promoted by the Tourism Authority across a range of marketing channels, including weekly email newsletters to its member base and subscribers, targeted social media ads, and through local media partners such as the San Diego Tribune. Furthermore, the survey was also distributed with support from partners including the San Diego Downtown Partnership, the San Diego Regional Economic Development Corporation, and other business district organizations/resident association groups. At closing, the survey garnered over 3,000 responses.

The community survey will help ensure alignment of future tourism development with residents' perceptions and aspirations for the destination.

## Industry Stakeholder Engagement

With support of local partners Intessa Communications, the consultant team engaged with nearly 100 industry professionals representing myriad interests and perspectives in San Diego:

- Access & Transportation
- Economic & Workforce Development
- Sports, Meetings & Conventions
- Heritage, Arts & Culture
- Hotels & Lodging
- Retail, Dining & Neighborhood Destinations
- Regional Destination Marketing
- SD-Baja Relations

These conversations were held in a variety of formats, including in-person and virtually - from 1-on-1 interviews to small focus groups (by theme).

## Steering Committee

The tourism stewardship plan is also being governed by a steering committee comprising key decision makers in the tourism industry. The steering committee has been engaged by the consultant team at key milestones to provide a check-and-balance throughout the planning process. Members include:

- **Colleen Anderson** (Executive Director, San Diego Tourism Marketing District)

- **Jessica Anderson** (Executive Vice President & Chief Operating Officer, San Diego Regional Chamber of Commerce)

- **Jaymie Bradford** (Assistant General Manager, San Diego County Water Authority)

- **Hampton Brown** (Vice President & CRO, San Diego International Airport)

- **Josh Callery-Coyne** (Vice President of Policy, Downtown San Diego Partnership)

- **Shawn Dixon** (Chief Operating Officer, San Diego Zoo Wildlife Alliance)

- **Martha Gilmer** (Chief Executive Officer, The San Diego Symphony Orchestra Association)

- **Stephen Hill** (Senior Advisor – Resiliency and Economic Recovery, San Diego Mayor Todd Gloria)

- **Kazeem Omidiji** (Director of Community Relations, SDG&E)

- **Rip Rippetoe** (President & CEO, San Diego Convention Center Corporation)

- **Eduardo Velasquez** (Senior Director, Research & Economic Development)

- **John David (JD) Wicker** (Director of Intercollegiate Athletics, San Diego State University)

- **Tracy Borkum** (Principal, Urban Kitchen Group)

# OUR VISITORS TODAY

# WHO THEY ARE & WHY SAN DIEGO

As San Diego idealizes becoming a premier destination, understanding the current visitor is essential to this objective. Currently, San Diego's visitors epitomize a spectrum of interests and demographic backgrounds, united by their appreciation for San Diego's unique blend of coastal charm, historical richness, and modern sophistication.

# San Diego is a regional destination welcoming over 15 million overnight domestic visitors primarily from cities across California, Arizona and other Western states.

## How Many Visitors And Where Are They Coming From?

In 2022, San Diego welcomed 16,455,000 overnight visitors - of which 90% are domestic (15,350,000) and 10% are international (1,105,000). The international market remains a small market for San Diego, with the top primary origin markets being Mexico, Canada and the UK. This share has remained consistent for the last decade.

On the domestic end, the largest origin markets are regionally proximate. 37% of overnight domestic visitors are from California and 7% from Arizona with the remainder primarily from Texas, Nevada, Colorado, and Washington.

## Who Is Coming To San Diego?

San Diego welcomes a diverse range of visitors - from singles (37% of overnight visitors) to couples (39%), as well as inter-generational groups traveling with seniors and/or young children (25%).

By age, about half of all visitors are aged between 25-44, skewing younger, and about 1 in 5 are aged 45-54. San Diego appears to be a magnet for younger, millennial travelers who are some of today's biggest market spenders and who are now parents traveling with children.

Although visitors to San Diego are 58% Caucasian, about 1 in 5 also identify as Hispanic/Latino. The City's proximity to Mexico and the bicultural influences on the cuisine and arts in San Diego make it a magnet destination for Hispanic travelers looking to learn more about their heritage or who are looking to experience other Latino cultures.

### Top Overnight Domestic Source States



Share of total overnight visitors

California 37%, Arizona 7%, Texas 7%, Nevada 4%, Washington 3%, Florida 3%, Colorado 3%, Illinois 3%, Oregon 2%, New York 2%
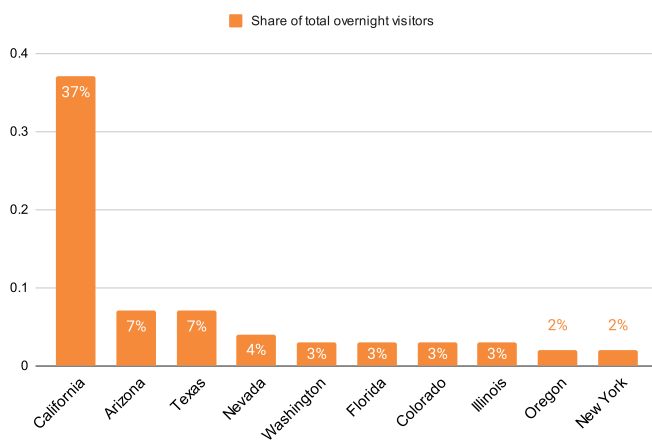
### Visitor Snapshot - Leisure Demographic



**Age**
- 11% Over 65
- 11% 55-65
- 17% 45-54
- 24% 35-44
- 26% 25-34
- 11% <24

By 2030, 21% of the population will be 65 and older vs 17% in 2021*

**HHI**
- 27% <60K
- 34% 60-100K
- 26% 100-150K
- 13% >150K

Average income $92K, vs $119K avg income for California Residents.

**Marital Status**
- 3%
- 24% With children
- 39% Married
- 34% Single
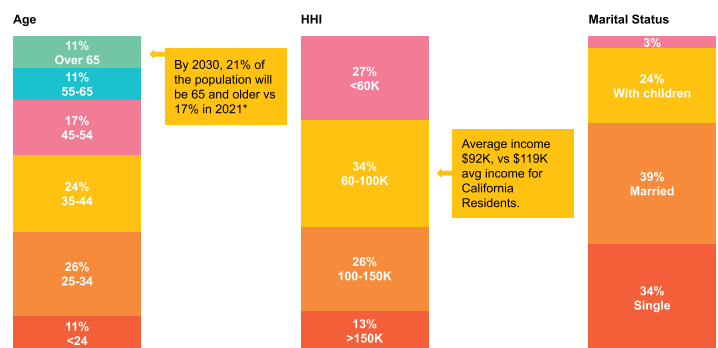
*U.S. Census Bureau

# Why San Diego - Urban Experiences Are A Key Drive Of Visitation Today

San Diego remains a primarily leisure destination. Over 64% of overnight visitors arrived for leisure trips, 35% Visiting Friends and Family, and 21% traveled on business/convention/group meeting trips. Regardless of the purpose of the trip, travelers to San Diego shared that their main intent and interests in traveling to San Diego are to relax at the beach. However, when surveyed, the top activities engaged in during their stays typically included far more than just relaxing at the beach. This included participating i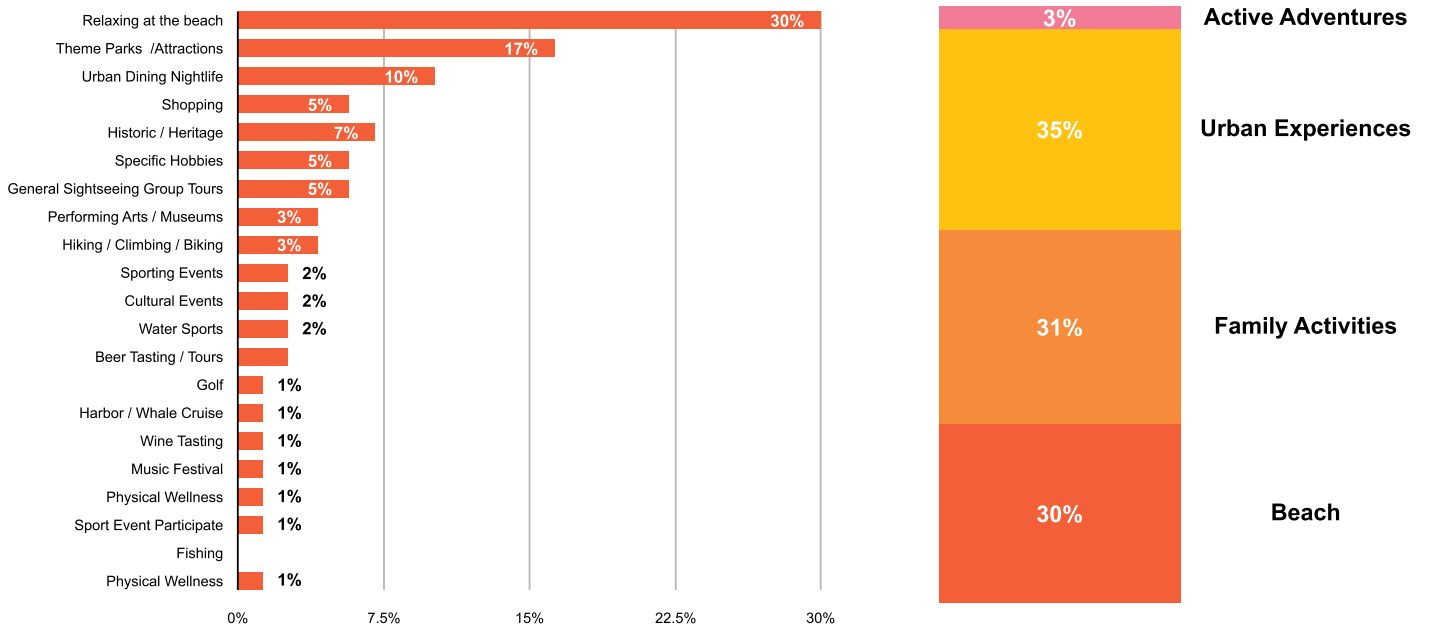n urban nightlife and dining, shopping, visiting theme parks/attractions, participating in specific hobbies, visiting historic/heritage sites, and taking part in outdoor adventure. In turn, the top ten attractions for overnight visitors (other than beaches) include the Zoo (16%), Old Town (15%), Gaslamp/Downtown (13%), Balboa Park (13%), Seaport Village (12%), Balboa Park Museums (12%), and SeaWorld (10%).

## Visitor Snapshot - Leisure Overnight Interests

| Activity | Percentage |
|---|---|
| Relaxing at the beach | 30% |
| Theme Parks /Attractions | 17% |
| Urban Dining Nightlife | 10% |
| Shopping | 5% |
| Historic / Heritage | 7% |
| Specific Hobbies | 5% |
| General Sightseeing Group Tours | 5% |
| Performing Arts / Museums | 3% |
| Hiking / Climbing / Biking | 3% |
| Sporting Events | 2% |
| Cultural Events | 2% |
| Water Sports | 2% |
| Beer Tasting / Tours | |
| Golf | 1% |
| Harbor / Whale Cruise | 1% |
| Wine Tasting | 1% |
| Music Festival | 1% |
| Physical Wellness | 1% |
| Sport Event Participate | 1% |
| Fishing | |
| Physical Wellness | 1% |

| Category | Percentage |
|---|---|
| Active Adventures | 3% |
| Urban Experiences | 35% |
| Family Activities | 31% |
| Beach | 30% |

Today, 30% of our leisure visitors are interested in beach activities, 31% in family activities, 35% in urban experiences and 3% in adventure. Business visitors follow a similar pattern: 25% are interested in the beach, 24% in family-friendly activities, 44% in urban experiences and 7% in adventure.

The share of visitors engaging in a cultural or urban activity is even higher: 41% of our leisure visitors and 53% of our business visitors participate in an "urban experience"; whereas only 22% of our leisure visitors and 16% of our business visitors participate in "beach activities".

## Leisure Overnight Visitors

**Interests**

| | |
|---|---|
| 3% | |
| 35% | +6 |
| 31% | 0 |
| 30% | -8 |

**Activities**

| |
|---|
| 6% |
| 41% |
| 31% |
| 22% |

- Active Adventures
- Urban Experiences
- Family Activities
- Beach

## Business Vistors

**Interests**

| |
|---|
| 7% |
| 44% |
| 24% |
| 25% |

**Activities**

| |
|---|
| 6% |
| 53% |
| 25% |
| 16% |
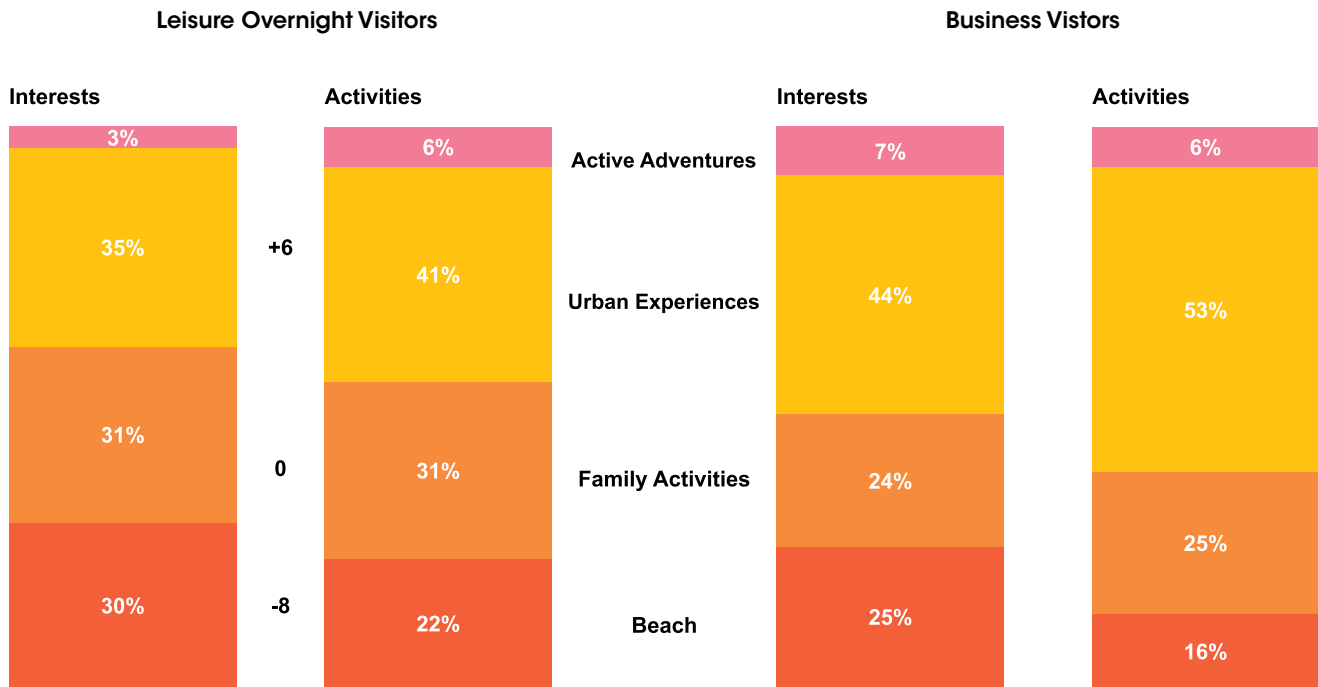
Source: San Diego Visitor Profile 2022 (Future Partners) - Leisure

# We are more than just a coastal beach destination.

"We're not just sand and sea, we're cultural.

"We are regional and 20 minutes to the border. San Diego is the most dynamic border city in the world"

"We want sustainability to be a part of the organization and industry, and feel organic to who we are"

"We need to tell the stories of the people that make up the communities in our neighborhoods so visitors can genuinely get to know San Diego"

"We need to build on the beach image of San Diego by diversifying the waterfront experiences - highlight the urban waterfront: Bay attractions, Embarcadero, etc.)"

"San Diego is also the Silicon Valley of Southern California and becoming more of a metropolitan city"

"We should be a destination that pays homage to its culture and become a cultural destination in SoCal."

# STATE OF TOURISM IN SAN DIEGO

# INDUSTRY WORKFORCE

In 2022, 1 in 8 jobs in San Diego County were supported by tourism dollars in the region.

Tourism jobs are diverse - 51% are direct leisure and hospitality jobs while the remaining 49% of jobs are in industries as diverse as transportation, information, legal, finance, insurance, and real estate.

A widely-reported benefit of jobs in the industry are its low barriers to entry. More than 70% of tourism occupations do not require a college degree, most require fewer than five years of experience, and approximately three-quarters of occupations require minimal or no on-the-job training. As such, 20% of workers in the industry are students - with the greatest share (27%) working in the food and beverage sector. The combination of the part-time nature of many of these jobs paired with higher wages, gives students the flexibility they need to continue or begin coursework while earning an income.

In addition, the average effective hourly wage of workers in the food service industry was $26.24/hour, 75% higher than San Diego county's minimum wage in 2022. When tips are accounted for, front-of-house workers in the industry earned an average of $29.92/hour and even higher for bar workers.

Despite these benefits, industry partners continue to cite challenges with hiring and retaining quality workforce in the industry. Many stakeholders across the region, as far as Oceanside, shared that the housing affordability issue across the state as being 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. Internal industry factors are also impacting the shortage of labor, chief among them smaller compensation packages. According to Laura Gershuni, Profesor at the Southwestern College, sign-on bonuses and benefits packages (e.g. health insurance) need to be competitive with other adjacent industries in order to be able to attract recent college graduates.

Furthermore, stakeholders also shared that while part-time jobs or near-term work schedules that are typically released 1-2 weeks ahead of time may be amenable to students, a large share of the workforce is still in search of stable schedule jobs.

The lack of overall retention of industry workforce is also reportedly due to a gap in training and professional development programs. Unlike other industries, there are reportedly limited skill development opportunities in the tourism industry for employees to make professional advances (e.g. customer service certifications) that can help employees stay resilient to shocks in the industry.

As such, the industry continues to face high turnover rates. In 2022, the turnover rate in the arts, entertainment, and recreation industry was 107%; in accommodation and food services it was 102%. Hotels in the city, in particular, are also anticipating an intensification of labor shortages over the next 5-10 years as the opening of Gaylord Pacific could attract a significant share of commuter labor from the border, posing staffing and service quality challenges for other hotels north of Chula Vista.

# There are key areas for improvement to ensure a consistent, quality pipeline of industry workforce.

"Middle income and affordable housing is hurting the workforce across all industry sectors (from arts/recreation to service)."

"Many hospitality-trained students are moving to non-adjacent industries to find better paying, steady jobs. Tech-friendly careers with the flexibility to work from home."

"For restaurants, it's been difficult to hire middle management even as salaries continue to increase."

"We need to simplify the border crossing process for employees living in MX and commuting into SD."

"Part time jobs may be good for students but what's missing is stable schedule jobs (the industry typically releases 1-2 weeks scheduling plans or have split shift arrangements that are not conducive to most of the labor force)."

"The industry needs a unified campaign to get people back into the hospitality workforce, in partnership/collaboration with local colleges."

"The industry should provide ongoing soft skill training to enter/advance in the industry, for example, customer service certifications."

"There are major demographic shifts that are impacting local workforce: Not enough immigration, declining population, aging population."

# ACCESS & TRANSPORTATION

There are significant projects planned and underway that demonstrate San Diego's commitment to improving its infrastructure to not only meet the needs of its growing year-round population, but that enhance the visitor's journey upon arrival in the destination as well as the city's overall positioning as a sustainable destination for visitors.

- **San Diego International Airport's New T1 Project:** This project involves the construction of a new terminal at San Diego International Airport, with an anticipated completion date of 2028. The new terminal is expected to enhance the airport's capacity and improve the traveler experience by adding 19 gates, a parking plaza (with 5,200 parking spaces), an elevated departures roadway, outdoor check-in pavilions, and a dedicated, on-airport arrivals roadway in Phase 1. By Phase 2, there will be a total of 30 gates at T1, more security checkpoint lanes, more gate-area seating, and up to two airline or common-use lounges/clubs, among other traveler experience improvements. The new T1 project is anticipated to create 15,000-20,000 construction related jobs and is anticipated to be the largest construction project in the region at a cost of $3.4 billion.

  - Even before the completion of T1 project, by June 2024, the destination is expected to gain 10 new net destinations (since 2019), with non-stop flights to Atlanta, Sacramento, Columbus, Pittsburgh, Miami, and seasonal non-stop flights to Anchorage, Alaska.

- **Airport Transit Connection:** The project will create a direct link between the San Diego International Airport and the San Diego regional transit system. This new connection will be integrated with many existing and future travel options in the urban core, including regional rail, Trolley, Rapid and local bus services, shuttles, and safe biking and walking improvements. At this time, environmental scoping is underway, and selection of alignment and mode will be made following the scoping process.

- **1HWY1 Project:** This ambitious $3.5 billion project aims to redesign Seaport Village and Central Embarcadero by 2025. While the plan includes additional hotels, and a convention space, along with a new observation tower, the creation of a new urban beach and a living shoreline will greatly enhance pedestrian and cyclist access to the urban waterfront.

- **SANDAG Bike Plan Early Action Program:** San Diego is developing an extensive network of bike pathways and projects to enhance regional bike connectivity, making biking a more comfortable and convenient mode of transportation across the city. Among bike infrastructure projects underway or recently completed include full repavement and construction of separated Bike Lanes on Convoy Street in Kearny-Mesa, bike lane construction in Sabre Springs Parkway, Lisbon Street, Skyline Drive, South Meadowbrook Drive, Prospect Street, La Jolla Blvd, Home Avenue; complete streets improvements on University Avenue, and expanded bike lanes on North Harbor Drive and Mission Bay Road, as well as other major thoroughfare redesign in Balboa Park to include both bike lanes and bus lanes.

- **Electrification Initiatives:** San Diego Gas & Electric (SDG&E) is undertaking various electrification projects to support the transition to zero-emission vehicles (ZEV) and equipment in San Diego. This includes expanding the charging infrastructure for cars, buses, trucks, shuttles, and more across the region. SDG&E's fleet goals include electrifying 100% of its light-duty fleet and transitioning 30% of its overall fleet to zero-emission vehicles by 2030, with a target of operating a 100% zero-emission fleet by 2035.

In order to fund many of these projects, a proposal to raise San Diego County's sales tax by half a percentage point is set for the November 2024 ballot. This measure, known as "Let's Go San Diego," seeks to fund various transportation infrastructure needs. If passed, 50% of the revenue would go towards public transit projects, including the airport transit connection to San Diego International Airport and a new rail line connecting the South Bay to Kearny Mesa. Another 27% would be allocated for highway maintenance and safety projects.

In addition, the city will need to invest in education campaigns and efforts to get users to fully understand the public transit systems - what's available, where it is available, how to pay for it, and how to get around the city safely - in order for the above projects to seamlessly integrate and serve as convenient modes of transportation for both residents and visitors. With regards to active transportation (walking/cycling), efforts are still required outside of downtown where sidewalk and protected bike infrastructure is limited and/or inconsistent and unable to support safe and comfortable walking and cycling.

# PRODUCTS & EXPERIENCES

San Diego continues to edge out comparable cities in its culture, outdoors, and business meetings & events but lags in other experiential areas.

It is critically important to assess the supply-side of the destination in terms of both the quantity and quality of accommodations, infrastructure, events and experiences offered versus competing destinations in order to determine how well suited (or not) the destination is positioned to respond to current and potential future market trends.

# Methodology

Resonance has developed a unique approach to assessing destinations and benchmarking the supply-side of tourism. Our innovative and proprietary approach to analyzing destinations based on our analysis of millions of online reviews provides destinations with a clear picture of both the quantity and quality of its experiences offered across more than twenty product and service categories.

Utilizing a combination of user-generated data collected directly from sources such as TripAdvisor, Google, CVent, 10Times, and CoStar, Resonance has benchmarked both the quantity of travel and tourism infrastructure and quality of experiences offered by your destination versus competing regional and national destinations with a similar product offering and similar quantity of hotel rooms.

This approach examines the quality of destinations from the visitors' point of view to measure supply-side performance from one destination to the next, and is a valuable tool to better understand the competitive advantages—and weaknesses—of the destination.

**The detailed assessment reports on both the quality and quantity of experiences in each of the following categories:**

### 1. CULTURE
i. Museums
ii. Theaters & Concerts

### 2. ATTRACTIONS
i. Amusement Parks
ii. Zoos & Aquariums
iii. Fun & Games

### 3. SIGHTSEEING
i. Sights & Landmarks
ii. Sightseeing Tours

### 4. NIGHTLIFE
i. Nightlife
ii. Casinos & Gambling

### 5. CULINARY
i. Food & Drink
ii. Restaurants

### 6. SHOPPING
i. Shopping

### 7. OUTDOORS
i. Outdoor Activities
ii. Boat Tours & Water Sports
iii. Nature & Parks

### 8. LODGING
i. Hotels
ii. B&B and Inns
iii. Specialty Lodging
iv. Vacation Rentals

### 9. MEETINGS
i. Largest Convention Center
ii. Number of Venues

### 10. CONNECTIVITY
i. Direct Flight Connections

Based on known competitive destinations and other destinations catering to a similar clientele, San Diego Tourism Authority selected a competitive set of domestic and international cities.

| Peer Set | Population | Economic Output ('000) | Visitor Arrivals |
|---|---|---|---|
| **San Diego CA** | **3,325,723** | **267,973,544** | **28,800,000** |
| Los Angeles CA | 13,179,586 | 1,124,682,354 | 46,400,000 |
| San Francisco CA | 4,788,510 | 668,677,573 | 21,900,000 |
| Las Vegas NV | 2,359,915 | 136,198,676 | 38,800,000 |
| Boston MA | 5,017,305 | 531,671,846 | 22,700,000 |
| Chicago IL | 9,584,302 | 764,583,227 | 49,000,000 |
| Washington DC | 678,972 | 580,000,000 | 21,900,000 |
| Seattle WA | 4,152,259 | 479,966,484 | 33,900,000 |
| Phoenix AZ | 5,069,353 | 316,090,586 | 19,500,000 |
| Austin TX | 2,499,236 | 193,773,558 | 27,400,000 |
| Orlando FL | 2,831,437 | 167,279,974 | 74,000,000 |
| Miami FL | 6,240,482 | 417,147,866 | 26,500,000 |
| Honolulu HI | 345,510 | 101,083 | 9,570,500 |
| Sydney (Australia) | 5,302,736 | 282,443,290 | 9,486,050 |
| Singapore | 6,039,101 | 397,000,000 | 14,876,560 |

# Overall Performance

San Diego ranked #8 out of 15. Overall, the quality of attractions, culture, outdoor, and culinary products in San Diego are perceived by visitors as being more comparable to cities like Orlando and Miami. When compared with West Coast competitors, San Diego's outdoor experiences far outrank destinations like Los Angeles, San Francisco, and Seattle, indicating a clear competitive advantage for the destination.

## Overall Rankings

| City | Rank |
|---|---|
| Las Vegas, NV | 1 |
| Singapore (Singapore) | 2 |
| Los Angeles, CA | 3 |
| San Francisco, CA | 4 |
| Chicago, IL | 5 |
| Sydney (Australia) | 6 |
| Miami, FL | 7 |
| **San Diego, CA** | **8** |
| Orlando, FL | 9 |
| Washington DC | 10 |
| Austin, TX | 11 |
| Seattle, WA | 12 |
| Boston, MA | 13 |
| Honolulu, HI | 14 |
| Phoenix, AZ | 15 |

## Tourism Products & Experiences - West Coast Comparison



SEATTLE, WA • SAN FRANCISCO, CA • SAN DIEGO, CA • LOS ANGELES, CA

HONOLULU, HI • PHOENIX, AZ • SAN DIEGO, CA • LAS VEGAS, NC

## Culture

San Diego's cultural scene is a value-add unlike most other destinations. From the influences of the Chicano, Mexicano, Latino and Indigenous arts and culture to the rich network of over 18 world-class museums in Balboa Park, the city has over 68 quality cultural offerings. However, the gap in offerings for San Diego, relative to its competitive set, is in cultural performances and concerts.

## Culinary

San Diego's food scene is an eclectic mix of global cuisines and fine casual dining concepts. Again, its proximity to Mexico means there's also a strong Mexican flair about its food offerings. From conchas in Barrio Logan, to seafood in Point Loma and a diverse mix of Asian food in Kearney-Mesa, San Diego has over 5,300 quality food experiences and restaurants. However, many of the food experiences in San Diego are not easily accessible from where hotels and lodging are located downtown and require visitors to travel by car, with limited alternative transit options.

### Culture

| | |
|---|---|
| Las Vegas, NV | 1 |
| Chicago, IL | 2 |
| San Francisco, CA | 3 |
| Singapore (Singapore) | 4 |
| Los Angeles, CA | 5 |
| Miami, FL | 6 |
| Washington DC | 7 |
| Seattle, WA | 8 |
| Sydney (Australia) | 9 |
| Austin, TX | 10 |
| **San Diego, CA** | **11** |
| Boston, MA | 12 |
| Honolulu, HI | 13 |
| Phoenix, AZ | 14 |
| Orlando, FL | 15 |

### Culinary

| | |
|---|---|
| Singapore (Singapore) | 1 |
| Los Angeles, CA | 2 |
| Chicago, IL | 3 |
| Sydney (Australia) | 4 |
| San Francisco, CA | 5 |
| Miami, FL | 6 |
| Las Vegas, NV | 7 |
| Washington DC | 8 |
| **San Diego, CA** | **9** |
| Boston, MA | 10 |
| Seattle, WA | 11 |
| Phoenix, AZ | 12 |
| Orlando, FL | 13 |
| Austin, TX | 14 |
| Honolulu, HI | 15 |

## Attractions

San Diego's top attractions are family-friendly, including SeaWorld, the Zoo, and Balboa Park. However, unlike its competitive destinations, San Diego's gap in offerings are iconic points of interests, whether a night time lights show or a panoramic attraction, and pop-up museums. With over 90 quality attractions, San Diego ranks #7, behind heavy-hitting destinations like Sydney, Chicago and Los Angeles.

## Sightseeing

San Diego's key sights and landmarks are diverse and range from neighborhoods like Little Italy and Convoy to historic monuments and sites like Old Town. The city ranks #8 with over 118 quality offerings, however, when compared with competitive destinations like San Francisco and Singapore, lacks sites of historic and cultural significance beyond Old Town.

### Attractions

| | |
|---|---|
| Las Vegas, NV | 1 |
| Orlando, FL | 2 |
| Singapore (Singapore) | 3 |
| Los Angeles, CA | 4 |
| Chicago, IL | 5 |
| Sydney (Australia) | 6 |
| **San Diego, CA** | **7** |
| Austin, TX | 8 |
| Miami, FL | 9 |
| San Francisco, CA | 10 |
| Seattle, WA | 11 |
| Boston, MA | 12 |
| Honolulu, HI | 13 |
| Phoenix, AZ | 14 |
| Washington DC | 15 |

### Sightseeing

| | |
|---|---|
| San Francisco, CA | 1 |
| Singapore (Singapore) | 2 |
| Chicago, IL | 3 |
| Sydney (Australia) | 4 |
| Los Angeles, CA | 5 |
| Washington DC | 6 |
| Boston, MA | 7 |
| **San Diego, CA** | **8** |
| Honolulu, HI | 9 |
| Seattle, WA | 10 |
| Las Vegas, NV | 11 |
| Austin, TX | 12 |
| Phoenix, AZ | 13 |
| Miami, FL | 14 |
| Orlando, FL | 15 |

# Nightlife

San Diego ranks #6 in nightlife, beating out major cities like Singapore, Chicago, and DC. Many of its quality nightlife offerings feature the craft brewery and craft cocktails that the city is known for, as well as spaces featuring nightlife entertainment such as jazz/piano bars. However, many of these recognized spots are clustered in Old Town and downtown, with very few located in neighborhoods known for emerging cocktail bars and clubs such as North Park.

# Shopping

One of San Diego's areas of improvement is in its shopping experiences. Ranking #10, the destination has a gap in independent retail concepts with handcrafted fare and specialty gifts that reflect local place and craft, and that visitors are often looking to bring a piece of their travel home with them.

## Nightlife

| | |
|---|---|
| Las Vegas, NV | 1 |
| Los Angeles, CA | 2 |
| San Francisco, CA | 3 |
| Austin, TX | 4 |
| Sydney (Australia) | 5 |
| **San Diego, CA** | **6** |
| Seattle, WA | 7 |
| Singapore (Singapore) | 8 |
| Miami, FL | 9 |
| Orlando, FL | 10 |
| Chicago, IL | 11 |
| Washington DC | 12 |
| Boston, MA | 13 |
| Phoenix, AZ | 14 |
| Honolulu, HI | 15 |

## Shopping

| | |
|---|---|
| Singapore (Singapore) | 1 |
| San Francisco, CA | 2 |
| Chicago, IL | 3 |
| Los Angeles, CA | 4 |
| Seattle, WA | 5 |
| Honolulu, HI | 6 |
| Sydney (Australia) | 7 |
| Las Vegas, NV | 8 |
| Miami, FL | 9 |
| **San Diego, CA** | **10** |
| Orlando, FL | 11 |
| Boston, MA | 12 |
| Austin, TX | 13 |
| Washington DC | 14 |
| Phoenix, AZ | 15 |

# Outdoors

San Diego's strongest experience category is its outdoor activities. This includes everything from quality park and open space access and outdoor activities such as kayak tours and sail rides. Most of the quality outdoor experiences available to visitors, however, are water-based activities that rely on the destination's coastal assets, whether surfing, sailing, diving. Given the destination's 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.

**Outdoors**

| Destination | Rank |
|---|---|
| **San Diego, CA** | 1 |
| Sydney (Australia) | 2 |
| Honolulu, HI | 3 |
| Miami, FL | 4 |
| Singapore (Singapore) | 5 |
| Las Vegas, NV | 6 |
| San Francisco, CA | 7 |
| Los Angeles, CA | 8 |
| Chicago, IL | 9 |
| Seattle, WA | 10 |
| Austin, TX | 11 |
| Orlando, FL | 12 |
| Boston, MA | 13 |
| Phoenix, AZ | 14 |
| Washington DC | 15 |

# LODGING/ HOTEL

San Diego has a diverse mix of hotel offerings, ranging from luxury to economy hotels, with properties comparable in age, size, and condition to those in competitive cities. Thanks to stable demand generators, the San Diego market has rapidly recovered from the pandemic, outpacing many of its peers.

# Methodology

Using data from Smith Travel Research, we analyzed the San Diego lodging market. The analysis includes a review of the historic hotel market, including occupancy, rate, and revenue, and benchmarking the lodging market against other West Coast destinations. In addition, we dissected the San Diego lodging market into seven different submarkets for further analysis. Each submarket's patterns of supply and demand, as well as seasonality, is explored.

# Lodging Supply Analysis

The following tables describe the current state of the San Diego hotel room supply, including the chain scale, hotel size, and age of hotels.

| By Chain Scale | Number of Rooms | % of Total Rooms |
|---|---|---|
| Economy Class | 9,376 | 15% |
| Midscale Class | 5,301 | 8% |
| Upper Midscale Class | 10,653 | 17% |
| Upscale Class | 10,966 | 17% |
| Upper Upscale Class | 18,294 | 29% |
| Luxury Class | 8,885 | 14% |

## Hotel Room Supply by STR Chain Scale
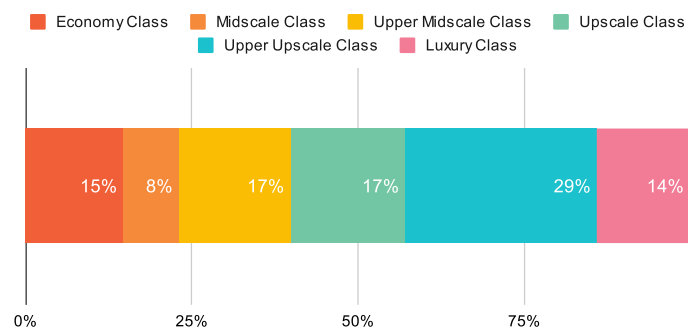


Supply is evenly distributed among asset classes, and roughly half of the hotel rooms are upscale and above. The upscale class has the most rooms among the chain scales, while the midscale class has the fewest rooms.

| By Size | Number of Rooms | % of Total Rooms |
|---|---|---|
| Less Than 75 Rooms | 8,258 | 13% |
| 75 - 149 Rooms | 18,362 | 29% |
| 150 - 299 Rooms | 16,780 | 26% |
| 300 - 500 Rooms | 11,319 | 18% |
| Greater Than 500 Rooms | 9,522 | 15% |

## Supply by Hotel Size
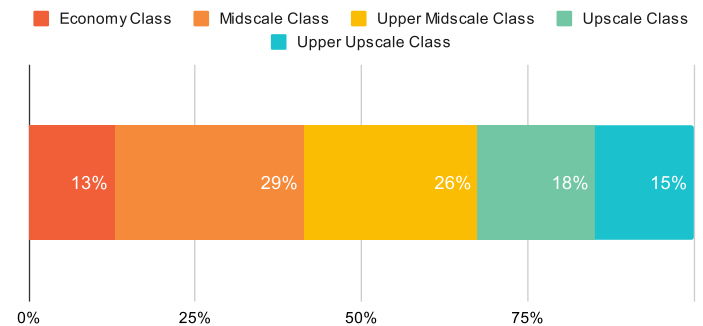


Most hotels have over 150 rooms (full-service or select-service hotels). Hotels with between 150 and 299 rooms offer nearly one-third of all the hotel rooms in San Diego. Only 8% of hotel rooms are in properties with less than 75 rooms, while 18% of rooms are in properties with more than 500 rooms.

| Opening Date | Number of Rooms |
|---|---|
| Built before 1990 | 22,553 |
| Built between 1990 to 2000 | 5,143 |
| Built between 2000 to 2010 | 6,555 |
| Built between 2010 to 2018 | 2,426 |
| Built after 2018 | 2,021 |

### Hotel Room Supply by Year of Construction
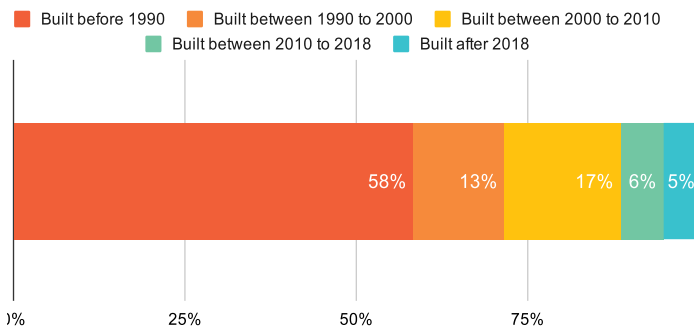


More than 70% of the hotel room inventory is over 20 years old, and only 5% of hotel rooms in San Diego were built in the last five years.

## Lodging Supply Trend (Projection)

This graph shows the historic number of rooms available annually in San Diego, the percentage change annually, and a projection of the supply of hotel rooms that will enter the market through 2027.

Supply declined in the last few years due to the conversion of older hotels to alternate uses or homeless shelters, and growth will remain muted in the near term due to the increases in construction costs and difficulties in securing financing. Some projects have become infeasible in the post-pandemic environment. Nevertheless, the opening of the Gaylord Pacific in 2025* will introduce sizable available rooms to the market. It's a healthy cycle of replacing older supplies with newer inventory that will induce demand.
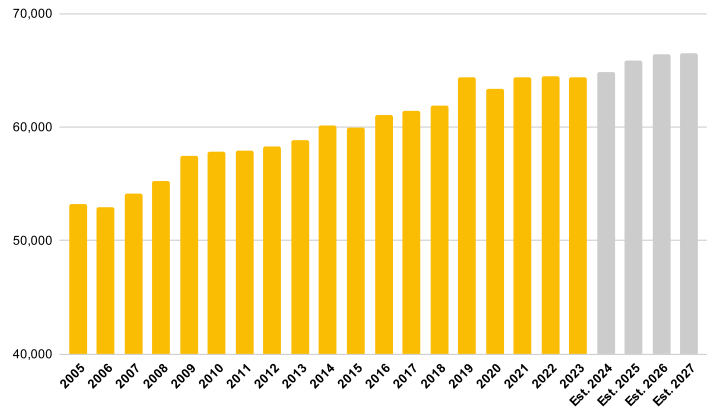


(*We note that only 50% of the Pacific Gaylord room count is considered in the analysis, given that the property is anticipated to be self-contained and is located in the adjacent city of Chula Vista.)

## Short-Term Rental Analysis

Short-term rentals, like AirBnb, VRBO, and others, have become more popular with travelers who prefer a whole unit to themselves instead of a hotel room. We gathered San Diego rental data from AirDNA, which tracks supply and demand for short-term rentals nationwide. We focused on entire place rentals, which differ from others that offer only a single room or shared use with the owner in the home. Entire place rentals are the closest approximation to a hotel room as the renter uses the entire unit and does not have another person staying in the same property. We gathered data from the TMD region of San Diego and compared it with the hotel market in this same area.

### Short-Term Rental Supply (2015–Oct 2023*) (in millions)

**Hotel Room Nights Available** ■ **Short-Term Listing Nights Available**

| Year | Hotel Room Nights Available | Short-Term Listing Nights Available |
|------|------|------|
| 2015 | 96% | |
| 2016 | 92% | 8% |
| 2017 | 85% | 15% |
| 2018 | 81% | 19% |
| 2019 | 82% | 18% |
| 2020 | 84% | 16% |
| 2021 | 85% | 15% |
| 2022 | 81% | 19% |
| 2023* | 77% | 23% |

**Hotel Room Nights Sold** ■ **Short-Term Listing Nights Booked**

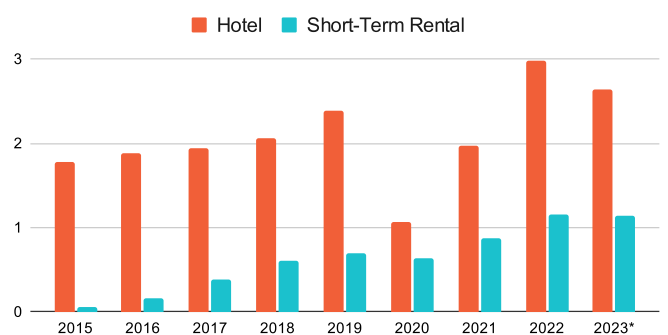| Year | Hotel Room Nights Sold | Short-Term Listing Nights Booked |
|------|------|------|
| 2015 | 98% | |
| 2016 | 95% | 5% |
| 2017 | 89% | 11% |
| 2018 | 85% | 15% |
| 2019 | 86% | 14% |
| 2020 | 80% | 20% |
| 2021 | 83% | 17% |
| 2022 | 83% | 17% |
| 2023* | 80% | 20% |
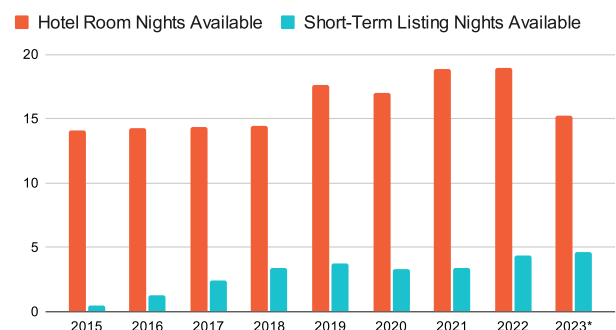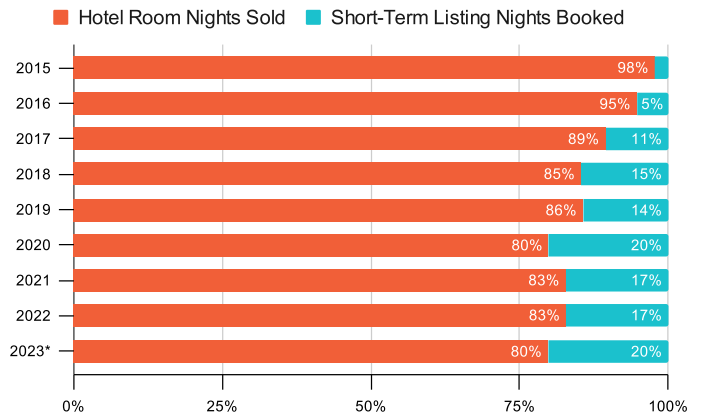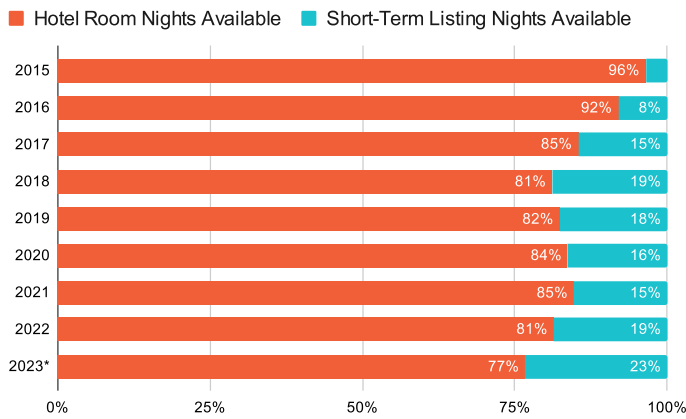
There has been significant growth in the short-term rental supply since 2015, with available room nights increasing from slightly more than 500,000 in 2015 to more than 4.3 million in 2022. As a share of the total hotel room supply, short-term rentals have historically been less than 20% of the total supply in the market area. Through October 2023, short-term rentals represented 23% of available room nights. However, this may be due to seasonality effects, where fewer short-term rentals are listed in winter when unit owners stay in San Diego after listing the unit during the summer when they live elsewhere. Meanwhile, hotel room nights remain relatively constant month to month.

A similar trend is seen in the demand for short-term rental units in San Diego, with booked listing nights increasing from 250,000 in 2015 to more than 2.8 million in 2022. The COVID-19 pandemic impacted demand for hotels much more than short-term rentals due to the relative safety from the lack of interaction with guests or staff. Sold room nights dropped by over 40% from 2019 to 2020, while short-term listing nights booked only dropped 12%. The share of demand for short-term rentals had been increasing until 2020 and remained stable, between 17% and 20%.

### Short-Term Rental Demand (2015–Oct 2023*) (in millions)

■ Hotel Room Nights Sold ■ Short-Term Listing Nights Booked
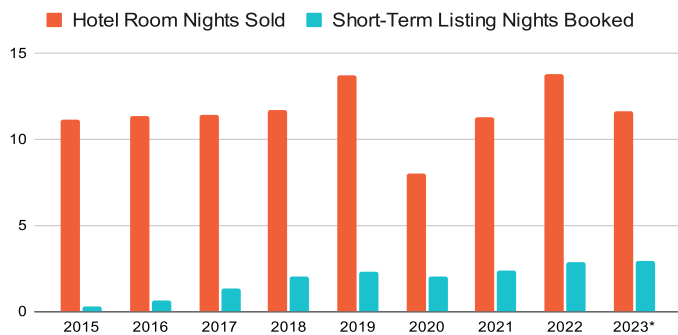
### Short-Term Rental Revenue (2015–Oct 2023*) (in billions)

■ Hotel ■ Short-Term Rental

## Hotel ■ Short-Term Rental

| Year | Hotel | Short-Term Rental |
|------|-------|-------------------|
| 2015 | 97% | 3% |
| 2016 | 92% | 8% |
| 2017 | 84% | 16% |
| 2018 | 77% | 23% |
| 2019 | 78% | 22% |
| 2020 | 63% | 37% |
| 2021 | 69% | 31% |
| 2022 | 72% | 28% |
| 2023* | 70% | 30% |

## Room Count by Submarket

| Submarket | Room Count |
|-----------|-----------|
| Downtown | 14,633 |
| Mission Valley | 7,931 |
| Pt. Loma - Airport | 4,703 |
| UTC | 4,156 |
| Mission Bay | 3,167 |
| La Jolla Coastal | 1,823 |
| I-15 Corridor | 1,817 |
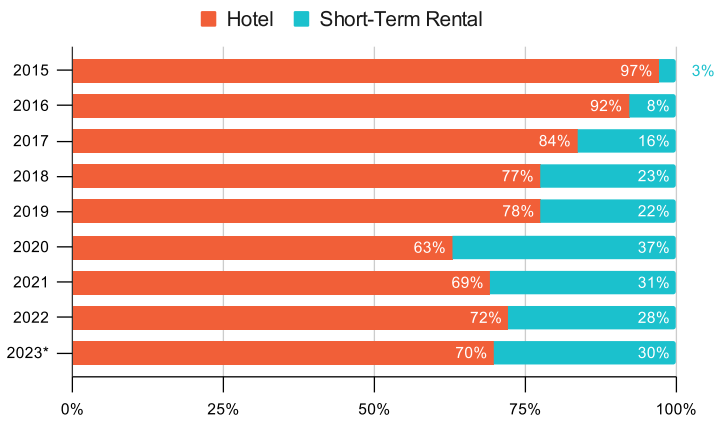
The revenue generated by short-term rentals has grown steadily since 2015, with a small drop of 8% in 2020 during the COVID-19 pandemic. However, that step back was much smaller than the 55% decrease in hotel room revenue over the same period. The revenue share has also steadily increased and spiked to over 1/3rd of the market during 2020. That peak has not been reached since 2020, with revenues stabilizing around 30% of the total lodging revenue generated in the market. The increased market share by revenue is due to the higher cost of renting a full unit than a single hotel room.
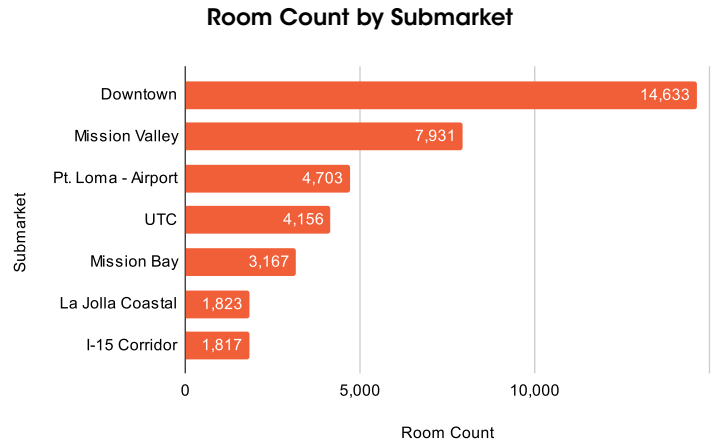
Downtown is San Diego's largest submarket, with more than one-third of the total hotel rooms market-wide. Mission Valley is the second largest submarket, while Point Loma Airport and UTC are tied for the smallest submarkets, with only 5% of the total room supply.

# Submarket Analysis

STR identifies seven distinct submarkets in San Diego: Downtown, Mission Valley, Point Loma- Airport, University Town Center, Mission Bay, La Jolla Coastal, and the I-15 Corridor. Each submarket behaves distinctly, with its supply, demand, and seasonality trends.

### Room Revenue by Submarket
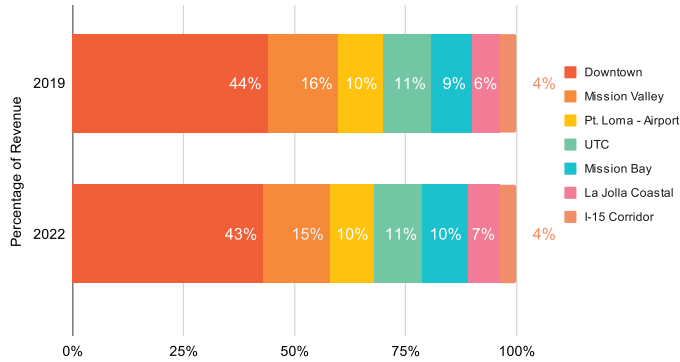


### Total Rooms Revenue by Submarket (2015-2022) (in millions)
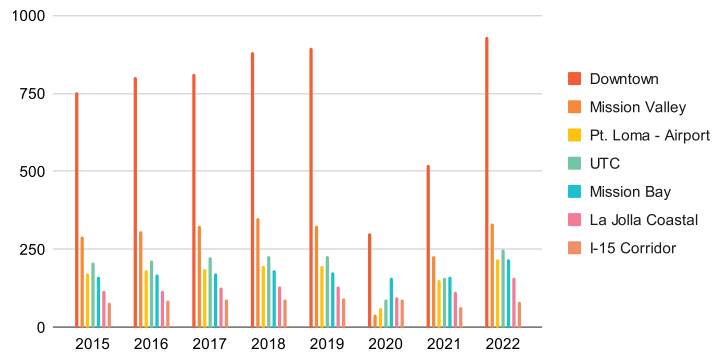


By revenue generated, Downtown remains the largest submarket, generating nearly three times as much revenue as Mission Valley, the next largest submarket by revenue. Mission Bay and La Jolla Coastal generate more revenue than expected based on room county due to the high average daily rate in these submarkets.

Room revenue had grown or remained static in each submarket before the COVID-19 pandemic, which impacted each submarket. In 2022, revenues recovered to pre-pandemic levels in each submarket. With its large meeting and event demand generators, Downtown was impacted more than any other submarket as the recovery of group demand lagged behind that of the leisure demand.

## Room Occupancy by Submarket (2016-2023)



Legend:
- Downtown
- Mission Valley
- Pt. Loma - Airport
- I-15 Corridor
- La Jolla Coastal
- Mission Bay
- UTC
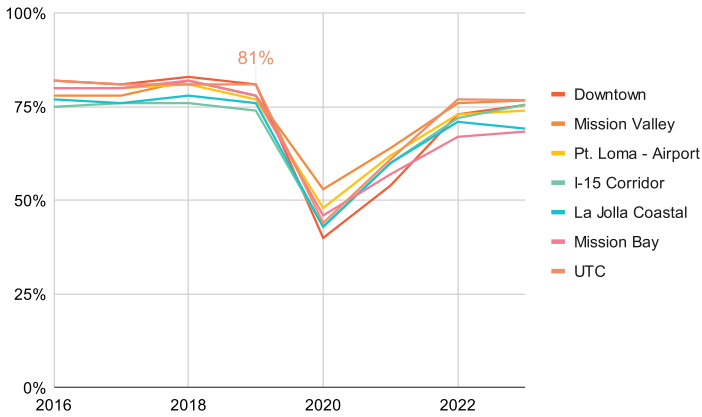
## Total Rooms Revenue (2018-2022) (in millions)



Legend: Nominal — Inflation Adjusted
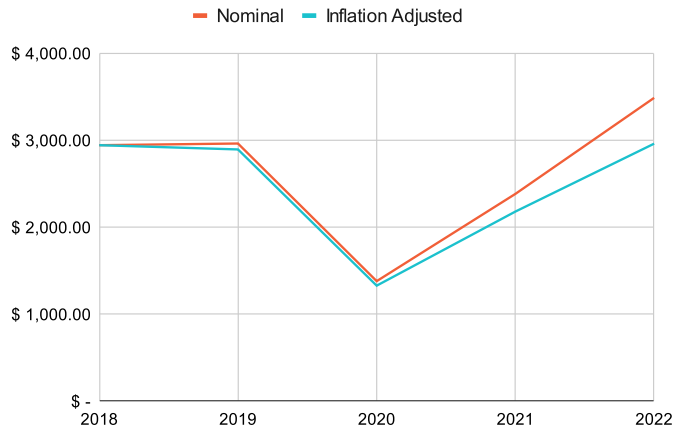
In nominal dollars, the San Diego market recovered to pre-COVID levels; however, when inflation is considered and adjusted each year, the market has not entirely recovered.

Historically, downtown has led the occupancy market. As of 2023, Mission Valley and the I-15 corridor led the pace of recovery due to affordability and a mix of demand. Mission Valley also fared the best during the COVID-19 pandemic, with occupancy only dropping slightly below 55% while all other submarkets were under 50%. Mission Bay and La Jolla Coastal had the lowest occupancy in 2023, the only submarkets below 70%. The I-15 corridor was the only submarket that surpassed 2019 occupancy, driven by corporate and contract demand. In addition, the submarket experienced a 20% decline in room supply during the pandemic.

## Segmentation Breakdown



Legend: ■ Leisure ■ Meeting and Group ■ Corporate ■ Contract

| Submarket | Leisure | Meeting and Group | Corporate | Contract |
|-----------|---------|-------------------|-----------|----------|
| UTC | 55% | 15% | 25% | 5% |
| Pt. Loma - Airport | 45% | 15% | 20% | 20% |
| Mission Valley | 50% | 30% | 15% | 5% |
| Mission Bay | 75% | 22% | 3% | 0% |
| La Jolla Coastal | 80% | 15% | 5% | 0% |
| I-15 Corridor | 50% | 10% | 30% | 10% |
| Downtown | 55% | 40% | 3% | 2% |
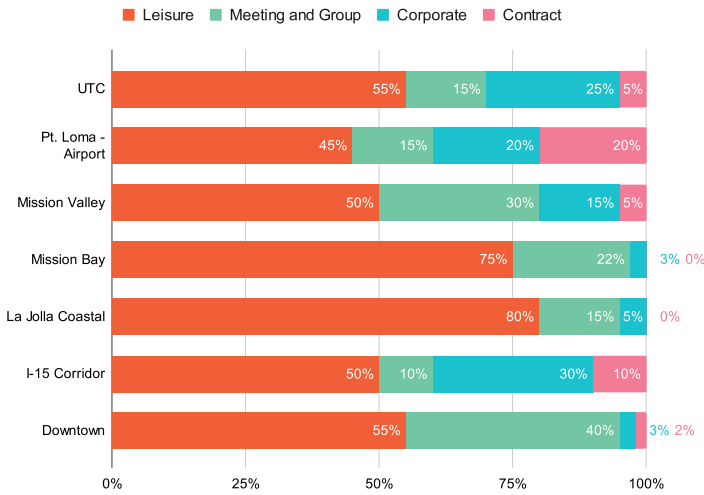
## Average Daily Rate by Submarket (2016-2023)



Legend: Downtown, Mission Valley, Pt. Loma - Airport, I-15 Corridor, La Jolla Coastal, Mission Bay, UTC

Data points: $338, $257, $247, $208, $181
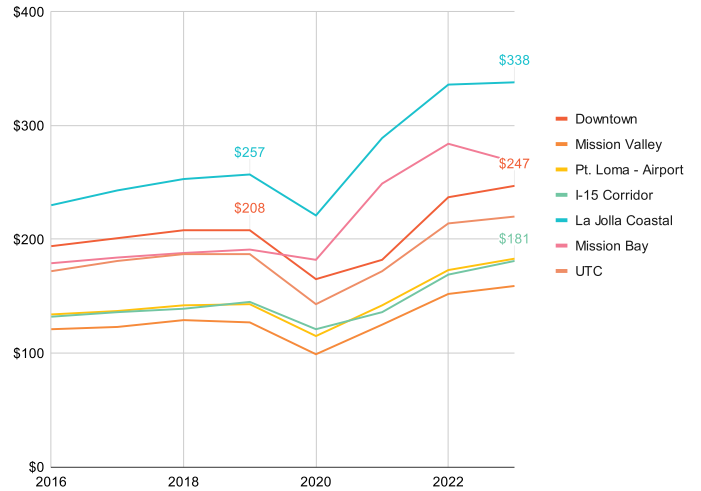
The segmentation of each market illustrates the main demand drivers for each submarket. With its corporate and university presence, UTC drives a lot of corporate demand for the San Diego market. Point Loma- Airport does the most contract business due to its proximity to the airport. Mission Valley does a lot of meeting and group business, driven by its proximity to downtown. Mission Bay is a strong leisure market, with its proximity to SeaWorld, the beach, and other leisure attractions. La Jolla is an even stronger leisure market, with marginal amounts of meetings and groups supported by its resorts. The I-15 corridor has the most corporate demand and relatively high contract demand. Downtown is the strongest meeting and group submarket, with its proximity to the San Diego Convention Center and the associated convention center hotels with large meeting and event spaces.

La Jolla Coastal has historically led the market in ADR, followed by Downtown. Mission Bay ADR has grown the most since the pandemic, nearly 40% above 2019 levels. It was also the only market that experienced a decline in 2023 as the pent-up demand subsided.

# Seasonality Analysis

We tracked the occupancy citywide by month and day of the week from April 2019 through March 2020 and compared it to the same data for 2023.

San Diego City properties have resumed the typical seasonality patterns that feature peak occupancies in the summer, especially on summer weekends. Mid-week demand during off-peak months remained relatively soft.

Finally, the following table shows the number of nights in each submarket in 2019, with an occupancy of over 85%.

### Demand Seasonability April 2019-March 2020

|  | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Total |
|---|---|---|---|---|---|---|---|---|
| Jan | 64% | 72% | 77% | 74% | 74% | 73% | 78% | 73% |
| Feb | 70% | 79% | 84% | 84% | 79% | 80% | 82% | 80% |
| Mar | 42% | 39% | 44% | 42% | 39% | 39% | 40% | 41% |
| Apr | 64% | 76% | 83% | 87% | 85% | 88% | 89% | 82% |
| May | 76% | 70% | 72% | 76% | 78% | 79% | 77% | 76% |
| Jun | 79% | 89% | 91% | 88% | 84% | 89% | 87% | 86% |
| Jul | 80% | 81% | 83% | 87% | 94% | 96% | 95% | 87% |
| Aug | 75% | 81% | 83% | 81% | 79% | 88% | 96% | 84% |
| Sep | 76% | 71% | 80% | 81% | 82% | 85% | 91% | 80% |
| Oct | 68% | 75% | 77% | 76% | 75% | 83% | 90% | 77% |
| Nov | 64% | 71% | 74% | 77% | 78% | 76% | 79% | 74% |
| Dec | 53% | 58% | 62% | 65% | 67% | 70% | 71% | 64% |
| Average | 67% | 71% | 76% | 77% | 76% | 79% | 81% | 75% |

### Peak Demand Days 2023 by Submarket

|  | Down-town | Mission-Valley | Mission Bay | La jolla | Utc | I-15 | Pt loma |
|---|---|---|---|---|---|---|---|
| Jan | 4 | 5 | 2 | 2 | 7 | 1 | 5 |
| Feb | 11 | 4 | 5 | 5 | 12 | 7 | 6 |
| Mar | 18 | 18 | 6 | 13 | 16 | 11 | 14 |
| Apr | 18 | 16 | 12 | 7 | 17 | 6 | 14 |
| May | 8 | 6 | 6 | 8 | 15 | 6 | 2 |
| Jun | 18 | 19 | 21 | 15 | 20 | 18 | 21 |
| Jul | 20 | 19 | 27 | 20 | 24 | 23 | 19 |
| Aug | 17 | 14 | 16 | 15 | 25 | 6 | 11 |
| Sep | 17 | 11 | 14 | 14 | 19 | 8 | 9 |
| Oct | 13 | 5 | 10 | 9 | 13 | 5 | 5 |
| Nov | 12 | 2 | 4 | 4 | 10 | 6 | 2 |
| Dec | 6 | 2 | 2 | 2 | 6 | 2 | 0 |
| Average | 162 | 121 | 125 | 114 | 184 | 99 | 108 |

UTC and Downtown had the most nights with over 85% occupancy, which are spread out throughout the year. Other submarkets, like Mission Bay and I-15, saw peaks in the summer months and lower occupancies for the rest of the year.

### Demand Seasonability 2023

|  | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Total |
|---|---|---|---|---|---|---|---|---|
| Jan | 56% | 59% | 65% | 66% | 67% | 67% | 70% | 64% |
| Feb | 66% | 77% | 84% | 82% | 75% | 74% | 78% | 76% |
| Mar | 69% | 81% | 84% | 80% | 75% | 76% | 82% | 78% |
| Apr | 62% | 76% | 80% | 81% | 79% | 81% | 84% | 77% |
| May | 70% | 65% | 70% | 72% | 71% | 81% | 90% | 74% |
| Jun | 77% | 82% | 86% | 83% | 81% | 86% | 93% | 84% |
| Jul | 80% | 83% | 85% | 87% | 89% | 93% | 95% | 87% |
| Aug | 69% | 72% | 76% | 75% | 76% | 86% | 89% | 77% |
| Sep | 70% | 68% | 77% | 79% | 79% | 79% | 87% | 77% |
| Oct | 68% | 73% | 79% | 78% | 78% | 82% | 87% | 78% |
| Nov | 54% | 59% | 65% | 70% | 73% | 77% | 76% | 68% |
| Dec | 52% | 60% | 64% | 61% | 59% | 60% | 65% | 60% |
| Average | 66% | 71% | 76% | 76% | 75% | 78% | 83% | 75% |

# 10-Year Forecast

Using data from STR, we projected the San Diego market occupancy and rate for the next ten years. This is based on historic market performance and anticipated new supply.

| | Historical | | | | | | Projected | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
| Occupancy | 80.7% | 78.5% | 45.4% | 58.9% | 73.4% | 74.8% | 76.5% | 78.2% | 78.8% | 79.2% | 79.2% | 79.2% | 79.2% | 79.2% | 79.2% | 79.2% |
| Change in Points | — | -2.2 | -33.1 | 13.5 | 14.5 | 1.4 | 1.7 | 1.7 | 0.6 | 0.4 | 0 | 0 | 0 | 0 | 0 | 0 |
| Average Rate | $173.34 | $174.13 | $137.57 | $168.03 | $209.59 | $216.45 | $222.29 | $228.96 | $235.83 | $242.91 | $250.19 | $257.70 | $265.43 | $273.39 | $281.60 | $290.04 |
| Change | — | 0.5% | -21% | 22.1% | 24.7% | 3.3% | 2.7% | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% |
| RevPAR | $139.83 | $136.68 | $62.39 | $98.97 | $153.89 | $161.90 | $170.12 | $179.03 | $185.84 | $192.50 | $198.28 | $204.23 | $210.35 | $216.66 | $223.16 | $229.86 |
| Change | — | -2.3% | -54.4% | 58.6% | 55.5% | 5.2% | 5.1% | 5.2% | 3.8% | 3.6% | 3% | 3% | 3% | 3% | 3% | 3% |

Occupancy is projected to stabilize at 79%, and the rate is projected to grow at 3% annually from 2025 onward. While occupancy never fully recovers to pre-pandemic levels, the increase in room rates is projected to push RevPAR beyond pre-pandemic levels.

|  | Historic | | Projected | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | **2019** | **2023** | **2024** | **2025** | **2026** | **2027** | **2028** | **2029** | **2030** | **2031** | **2032** | **2033** |
| **Leisure** | | | | | | | | | | | | |
| Total Demand | 6,237,194 | 5,950,574 | 6,069,585 | 6,190,977 | 6,252,886 | 6,284,151 | 6,284,151 | 6,284,151 | 6,284,151 | 6,284,151 | 6,284,151 | 6,284,151 |
| Growth Rate | – | -4.6% | 2% | 2% | 1% | 0.5% | 0% | 0% | 0% | 0% | 0% | 0% |
| **Meeting & Group** | | | | | | | | | | | | |
| Total Demand | 3,238,543 | 3,029,383 | 3,089,971 | 3,213,569 | 3,438,519 | 3,455,712 | 3,455,712 | 3,455,712 | 3,455,712 | 3,455,712 | 3,455,712 | 3,455,712 |
| Growth Rate | – | -6.5% | 2% | 4% | 7% | 0.5% | 0% | 0% | 0% | 0% | 0% | 0% |
| **Commercial** | | | | | | | | | | | | |
| Total Demand | 1,799,191 | 1,298,307 | 1,363,222 | 1,431,383 | 1,502,953 | 1,548,041 | 1,548,041 | 1,548,041 | 1,548,041 | 1,548,041 | 1,548,041 | 1,548,041 |
| Growth Rate | – | -27.8% | 5% | 5% | 5% | 3% | 0% | 0% | 0% | 0% | 0% | 0% |
| **Contract** | | | | | | | | | | | | |
| Total Demand | 719,676 | 540,961 | 568,009 | 596,410 | 626,230 | 645,017 | 645,017 | 645,017 | 645,017 | 645,017 | 645,017 | 645,017 |
| Growth Rate | – | -24.8% | 5% | 5% | 5% | 3% | 0% | 0% | 0% | 0% | 0% | 0% |
| **Totals** | | | | | | | | | | | | |
| Total Supply | 37,648 | 39,628 | 39,704 | 40,056 | 41,098 | 41,253 | 41,253 | 41,253 | 41,253 | 41,253 | 41,253 | 41,253 |
| Rooms Supply Growth | – | – | 0.2% | 0.9% | 2.6% | 0.4% | 0% | 0% | 0% | 0% | 0% | 0% |
| Marketwide Occupancy | 87.3% | 74.8% | 76.5% | 78.2% | 78.8% | 79.2% | 79.2% | 79.2% | 79.2% | 79.2% | 79.2% | 79.2% |

Leisure demand is already high in San Diego, and there is not much room for further growth in this sector. The growth of the meeting and group segment is driven by the addition of the Gaylord in Chula Vista, with its large meeting and group presence. Commercial and contract travel will continue to recover from pandemic levels, but these segments are expected to remain relatively small relative to leisure and meeting and group.

# Competitive Benchmarking

The quantity and quality of supply in San Diego County are on par with its competitive peer set on the West Coast. However, it has experienced the most supply shrinkage in the past five years due to conversions and the closure of older hotels. The limited number of new hotel openings within the past five years has partially contributed to this trend.

| Destination | Supply | County Population | Hotel Rooms per 1,000 Residents |
|---|---|---|---|
| SFO - San Mateo | 55,294 | 1,570 | 35.21 |
| Seattle | 50,338 | 2,298 | 21.90 |
| San Diego | 64,381 | 3,341 | 19.27 |
| Orange County | 61,178 | 3,209 | 19.07 |
| Phoenix | 70,190 | 4,624 | 15.18 |
| LAX | 115,548 | 9,900 | 11.67 |
| **Average** | **69,488** | **4,157** | **20.38** |

**Supply Trend**
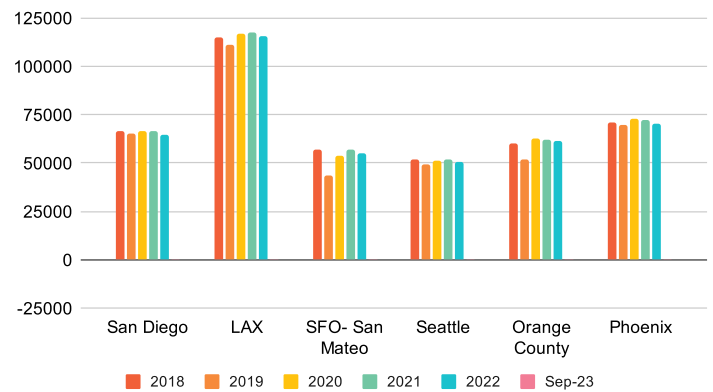
# There are key structural challenges impacting the long-term success of our hotel market.

"Planning and permitting process is complicated, and  communication among different entities (City, County, Port of SD, and Port Tenants) is inefficient."

"Hoteliers don't expect occupancies to surpass the high water marks achieved in 2018-2019."

"The lack of affordable housing partially contributes to the labor shortages."

"Hoteliers are not currently factoring in the expansion of the Convention Center into their plans, which would primarily impact Downtown hotels."

"There is no public transportation linking the airport to any of the hotel submarkets."

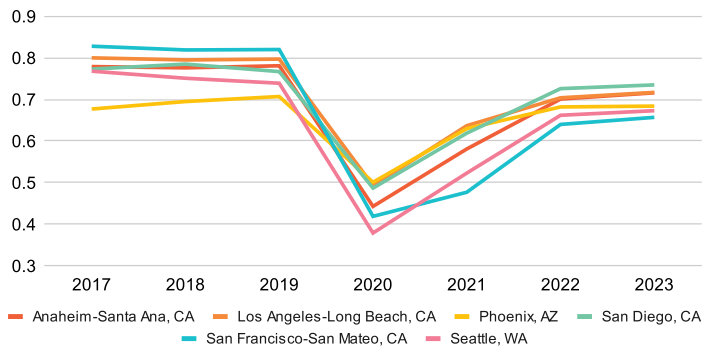"Managers are increasing ADRs above inflationary rates to keep up with rising labor costs."

"Some submarkets are getting more promotion and exposure than the other submarkets."
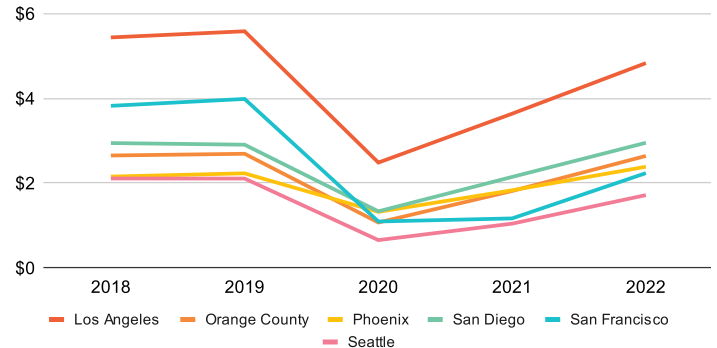
By occupancy, San Diego hotels have recovered faster than their West Coast peers, emerging as the top performer. By 2023, the market had reached 96% of its 2019 occupancy, driven by the strength in the group and leisure segments. Its peak performance aligns generally with that of its California peers.

Finally, by revenue, San Diego has fully recovered post-pandemic with revenues surpassing pre-pandemic levels in inflated dollars. Given the strength in occupancy, San Diego has emerged as the second-largest lodging market on the West Coast in total revenue. The percentage of revenue growth was comparable to that of Orange County and Phoenix and significantly exceeded that of Los Angeles, San Francisco, and Seattle.

**Occupancy Benchmarking**



Legend: Anaheim-Santa Ana, CA; Los Angeles-Long Beach, CA; Phoenix, AZ; San Diego, CA; San Francisco-San Mateo, CA; Seattle, WA

**Lodging Revenue Benchmarking (Inflated Dollars)**



Legend: Los Angeles; Orange County; Phoenix; San Diego; San Francisco; Seattle

# SPORTS, MEETINGS & CONVENTIONS INFRASTRUCTURE

San Diego's major venues are well-supported by ample hotel supply increasing its ability to attract attendees from across the country. With its rise in popularity as a destination, demand for venues year-round has increased and availability of venues are becoming limited.

# Methodology

HVS assessed visitation patterns and trends in San Diego segmented by venue types: 1) sports, 2) cultural/museums, 3) performing arts, and 4) convention and meeting venues. Venues include the zoo, museums, professional sports stadiums, performing arts venues, convention and conference centers, and other venues. Our analysis breaks out visitation by the home of the attendee, showing how each venue contributes to out-of-town visitation in San Diego. Comparing 2023 to 2019 shows how the COVID-19 pandemic changed consumer behavior and venue use.

**This work included:**

- Reviewing and analyzing historical demand and attendance data provided by the SDCC.
- Reviewing and analyzing sales and marketing data provided by the San Diego Tourism Authority.
- Compiling data on visitation to a series of cultural and museum, sports, event and convention, and performing arts venues, including visitation from attendees outside the market area.
- Describing the strengths, weaknesses, opportunities, and threats to each of the major venues in the market area.
- Compiling data on professional sports venues in San Diego and the comparable facilities in the set of peer cities, as well as 14 competitive convention centers to analyze the position of the SDCC relative to its peer set.
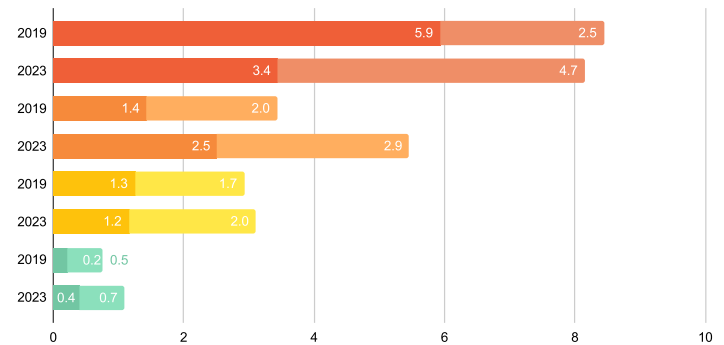
HVS also used locational analytics Placer.ai. Placer.ai provides mobility and foot traffic data through partnerships with over 500 mobile apps and access to over 30 million devices. Using a proprietary extrapolation algorithm that accounts for potential biases in the data, Placer.ai uses a representative sample to produce location and visitor attribution data for the US. To ensure accuracy, Placer.ai depends on daily and weekly quality checks and benchmarks against public and validated data sources such as credit card transactions and store revenue.

# Overall Visitation Trends

The following visitation tables compare the number of visitors to various types of event venues in San Diego. Attendance is broken out by attendee origin from outside of 50 miles, as well as outside 150 miles. HVS used the 50-mile radius because those attendees are from outside the San Diego market area and import their spending into the market when they come to San Diego events and venues. Attendees from outside 150 miles represent overnight attendees of these venues. They have to drive more than 2.5 hours each way for an event and are most likely spending the night in San Diego before or after the event. Visitors from each radius indicate how each segment of venues, and the venues themselves, attract new spending and new overnight spending to the market.

Performing arts venues, cultural venues, and museums in San Diego collectively drive the most visitation to the destination—more than twice the number of visitors to conventions and meetings. However, visitation related to conventions and meetings has greater economic impact per visitor because visitors stay longer and have higher average daily spending.
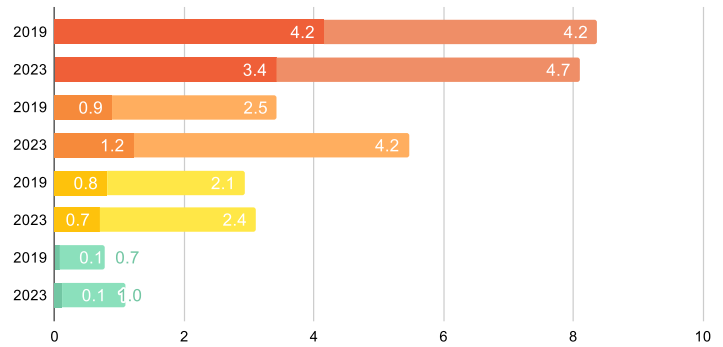
### Total Visitors by Type of Venue (50 Miles) (in millions)



| | 2019 | 2023 |
|---|---|---|
| | 5.9 / 2.5 | 3.4 / 4.7 |
| | 1.4 / 2.0 | 2.5 / 2.9 |
| | 1.3 / 1.7 | 1.2 / 2.0 |
| | 0.2 / 0.5 | 0.4 / 0.7 |

Source: Placer.ai

Cultural and museum venues drive a significant amount of overnight stays when the radius is increased to 150 miles. The amount of overnight visitors and the share of overnight visitors at cultural and museum venues did decrease from 2019 to 2023.
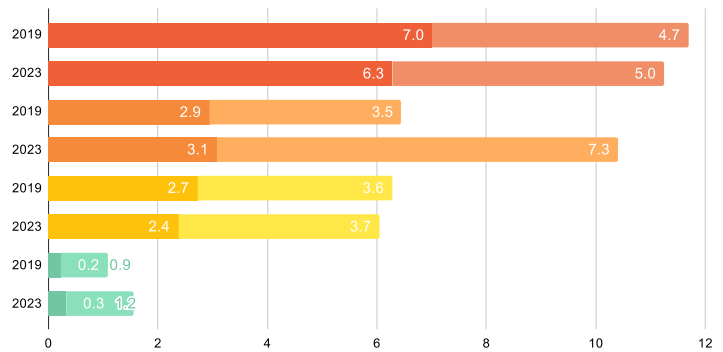
**Total Visitors by Type of Venue (150 Miles) (in millions)**

| Year | Value 1 | Value 2 |
|------|---------|---------|
| 2019 | 4.2 | 4.2 |
| 2023 | 3.4 | 4.7 |
| 2019 | 0.9 | 2.5 |
| 2023 | 1.2 | 4.2 |
| 2019 | 0.8 | 2.1 |
| 2023 | 0.7 | 2.4 |
| 2019 | 0.1 | 0.7 |
| 2023 | 0.1 | 1.0 |

Source: Placer.ai

While the total number of visits to cultural/museum venues and convention and meeting venues decreased slightly from 2019 to 2023, driven by a decrease in visits from outside the market area, sports and performing arts venues saw both an increase in the number of total visits and the number of visits from outside the market area from 2019 to 2023. Sports especially saw large amounts of growth from the local market, due to the opening of Snapdragon stadium and its multiple tenant sports teams.
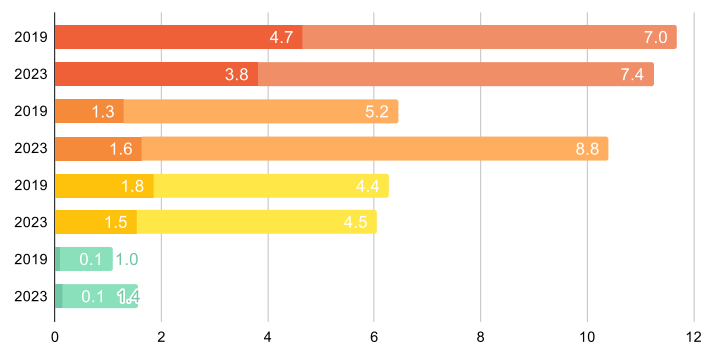
**Total Visits by Type of Venue (50 Miles) (in millions)**

| Year | Value 1 | Value 2 |
|------|---------|---------|
| 2019 | 7.0 | 4.7 |
| 2023 | 6.3 | 5.0 |
| 2019 | 2.9 | 3.5 |
| 2023 | 3.1 | 7.3 |
| 2019 | 2.7 | 3.6 |
| 2023 | 2.4 | 3.7 |
| 2019 | 0.2 | 0.9 |
| 2023 | 0.3 | 1.2 |

Source: Placer.ai

Cultural and museum institutions generate the most overnight visitation. However, the number of overnight attendees declined by nearly one million visits from 2019 to 2023. Convention and meeting overnight visits also dropped over the same period, but only by 300,000 visits. Sports visits from more than 150 miles increased by 300,000, while the total visits increased by more than five million due to the addition of Snapdragon Stadium.

**Total Visits by Type of Venue (150 Miles) (in millions)**
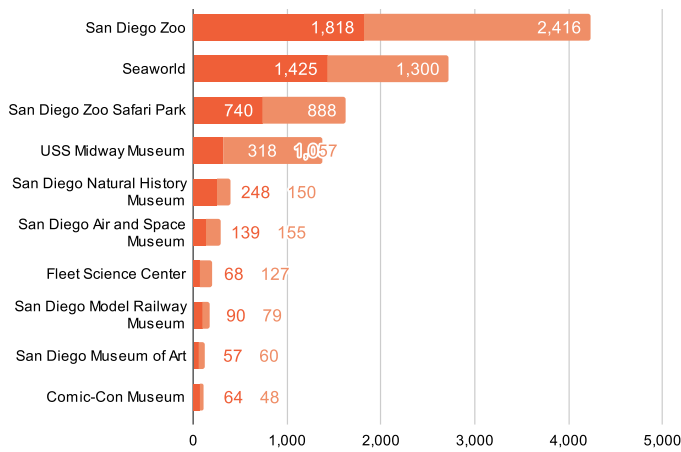
| Year | Value 1 | Value 2 |
|------|---------|---------|
| 2019 | 4.7 | 7.0 |
| 2023 | 3.8 | 7.4 |
| 2019 | 1.3 | 5.2 |
| 2023 | 1.6 | 8.8 |
| 2019 | 1.8 | 4.4 |
| 2023 | 1.5 | 4.5 |
| 2019 | 0.1 | 1.0 |
| 2023 | 0.1 | 1.4 |

Source: Placer.ai
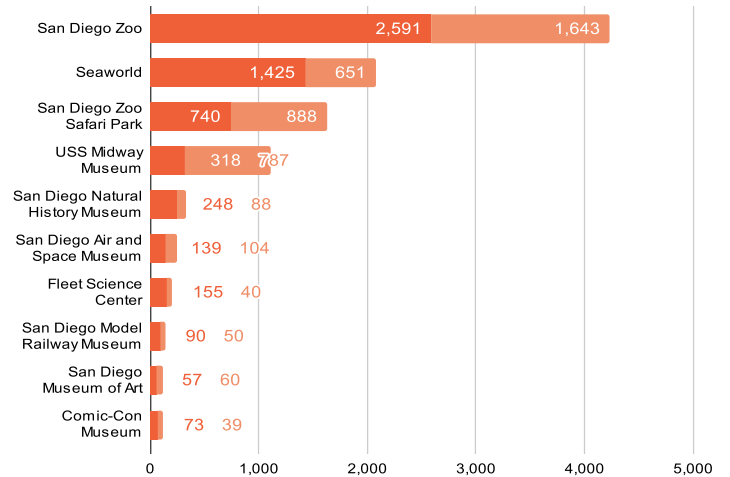
# Arts & Cultural Venue Visitation Trends

We analyzed visitation to cultural and museum venues in San Diego in 2023. To estimate the number of tourists visits that these venues attract, we considered visits within a 50-mile to radius local visitation and from outside a 50-mile radius to be tourists. The figure below also shows the estimated visits from within and outside a 150-mile radius. These tourists are likely to require lodging.

### Museum & Cultural Visits in 2023 (50-mile)

| Venue | Within | Outside |
|---|---|---|
| San Diego Zoo | 1,818 | 2,416 |
| Seaworld | 1,425 | 1,300 |
| San Diego Zoo Safari Park | 740 | 888 |
| USS Midway Museum | 318 | 1,057 |
| San Diego Natural History Museum | 248 | 150 |
| San Diego Air and Space Museum | 139 | 155 |
| Fleet Science Center | 68 | 127 |
| San Diego Model Railway Museum | 90 | 79 |
| San Diego Museum of Art | 57 | 60 |
| Comic-Con Museum | 64 | 48 |

Source: Placer.ai

### Museum & Cultural Visits in 2023 (150-mile)

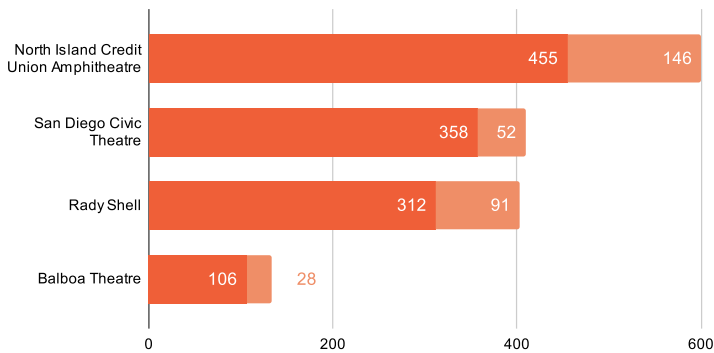| Venue | Within | Outside |
|---|---|---|
| San Diego Zoo | 2,591 | 1,643 |
| Seaworld | 1,425 | 651 |
| San Diego Zoo Safari Park | 740 | 888 |
| USS Midway Museum | 318 | 787 |
| San Diego Natural History Museum | 248 | 88 |
| San Diego Air and Space Museum | 139 | 104 |
| Fleet Science Center | 155 | 40 |
| San Diego Model Railway Museum | 90 | 50 |
| San Diego Museum of Art | 57 | 60 |
| Comic-Con Museum | 73 | 39 |

Source: Placer.ai

The most popular cultural venues are the San Diego Zoo and SeaWorld, followed by Balboa Park - the cultural center of San Diego and home to nearly 60 institutions and attractions. The Zoo, the Safari Park, the USS Midway Museum, the Air and Space Museum, the Fleet Science Center, and the Art Museum each have a larger share of tourist visits.

As expected, the venues that drive the most tourism generate the most overnight stays. The Safari Park, Midway Museum, and Museum of Art all attract more overnight visitors than people who are visiting on a day trip or who live in the local market. The Zoo attracts the most overnight attendees overall.

The North Island Credit Union Amphitheater attracts the most visits among the set of performing arts event venues in San Diego, however only 24% of visits to the venue are from outside the market area. Performing arts venues rarely generate large amounts of out of market visitation. A few acts like Taylor Swift and Beyonce may draw a larger proportion of out of market visits than in market, but those shows are few and far between.
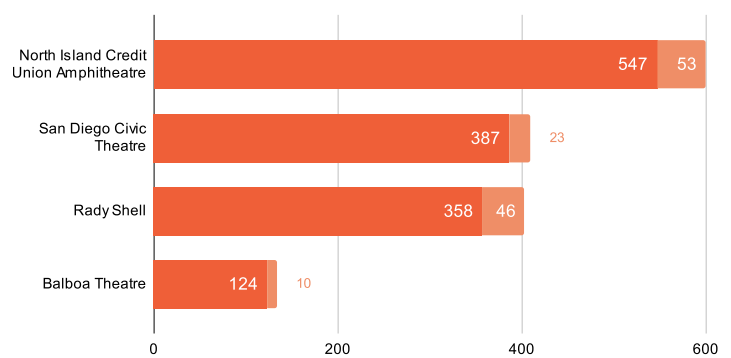
Even fewer overnight attendees go to performing arts venues in San Diego than those that are out of market. Rady Shell attracts nearly as many overnight attendees as North Island Credit Union Amphitheater, due to its usage as an event venue for groups using the convention center.

**Performing Arts Visits in 2023 (in thousands) (50-mile)**

| Venue | Value 1 | Value 2 |
|---|---|---|
| North Island Credit Union Amphitheatre | 455 | 146 |
| San Diego Civic Theatre | 358 | 52 |
| Rady Shell | 312 | 91 |
| Balboa Theatre | 106 | 28 |

Source: Placer.ai

**Performing Arts Visits in 2023 (in thousands) (150-mile)**

| Venue | Value 1 | Value 2 |
|---|---|---|
| North Island Credit Union Amphitheatre | 547 | 53 |
| San Diego Civic Theatre | 387 | 23 |
| Rady Shell | 358 | 46 |
| Balboa Theatre | 124 | 10 |

Source: Placer.ai

# Sports Venues Visitation Trends

HVS examined visitation to professional and major amateur sports venues in San Diego in 2023. HVS broke out visitation by the 50-mile and 150-mile radius to evaluate the level of out of market and overnight visitation to each venue.

**Key Takeaways:**

- **MLS promises to increase visitor growth.** The addition of San Diego FC in the 2025 season at Snapdragon Stadium will attract fans from around the region. The prospects for MLS game attendance in 2025 would depend on various factors, including the team's performance, marketing efforts, fan engagement initiatives, economic conditions, and any unforeseen circumstances such as pandemics or major sporting events. Proximity to a fan base in Mexico provides an advantage for San Diego FC.

- **Petco Park supports tourism activity.** Although baseball game attendance follows team performance, Petco Park is highly utilized for non-baseball events. Petco Park, which opened in 2004, has seen fluctuating attendance figures over the years. During successful seasons or when the Padres have made playoff runs, attendance tends to increase. Conversely, during rebuilding phases or periods of poor performance, attendance has declined. Petco Park staff has been highly successful at attracting non-baseball events in the stadium and the adjacent amphitheater. It supports city-wide events such as Comic-Con and other convention events.

- **San Diego is unlikely to attract new major league franchises.** Given the competition of major league franchises, San Diego is unlikely to attract major league basketball, hockey, or football teams. Las Vegas, Portland, Montreal, Nashville, and Charlotte are growing in population and more likely than San Diego to attract teams that are relocating or to be awarded a league expansion franchise. San Diego should focus on improving thee fan experiences at Petco Park and Snapdragon Stadium.

## Sports Venue Visits in 2023 (in thousands) (50-mile)
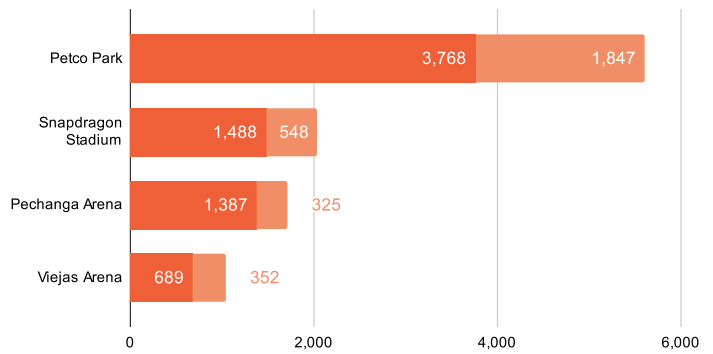


Source: Placer.ai

## Sports Venue Visits in 2023 (in thousands) (150-mile)
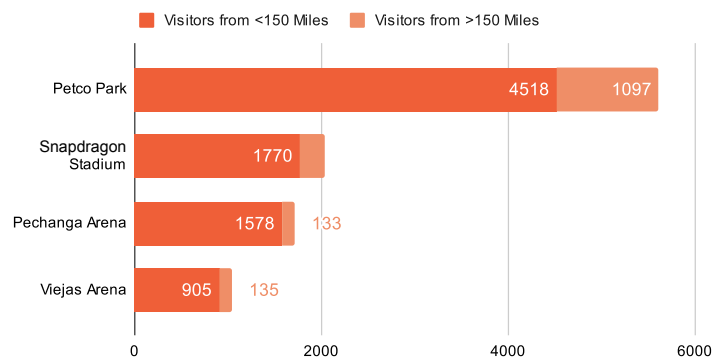


Source: Placer.ai

Petco Park remains the most visited sports venue in San Diego, however recent growth in visitation for sports events is also attributable to Snapdragon Stadium. Tenants at Snapdragon include SDSU Aztec Football, San Diego Wave FC of the National Women's Soccer League, and the San Diego Legion of Major League Rugby. Other events include concerts, festivals, dirt shows, international sporting events, championships, and community events.

Petco Park remains a major driver of overnight visits, with more than 20% of all visits coming from overnight visitors and more than 1 million visits total. Approximately 13% of Viejas Arena and Snapdragon Stadium attendees are overnight visitors.

# Benchmarking Sports Venues

HVS gathered data on sports venue capacities in the set of peer cities that are comparable to the two major league sports stadiums in San Diego: Petco Park and Snapdragon Stadium.

## Peer City Major League Sports

### Professional Sports Franchise

| Market | Football | Baseball | Basketball | Hockey | Soccer |
|---|:---:|:---:|:---:|:---:|:---:|
| Miami | ✓ | ✓ | ✓ | ✓ | ✓ |
| Washington D.C. | ✓ | ✓ | ✓ | ✓ | ✓ |
| Chicago | ✓ | ✓ | ✓ | ✓ | ✗ |
| Boston | ✓ | ✓ | ✓ | ✓ | ✗ |
| Los Angeles | ✓ | ✓ | ✓ | ✓ | ✓ |
| Seattle | ✓ | ✓ | ✗ | ✓ | ✗ |
| Phoenix | ✓ | ✓ | ✓ | ✗ | ✗ |
| San Francisco | ✓ | ✓ | ✓ | ✗ | ✗ |
| Las Vegas | ✓ | ✗ | ✗ | ✓ | ✗ |
| Orlando | ✗ | ✗ | ✓ | ✗ | ✓ |
| **San Diego** | ✗ | ✓ | ✗ | ✗ | ✓ |
| Austin | ✗ | ✗ | ✗ | ✗ | ✓ |

## Major League Stadium/Arena Seats Per Capita

| Market | MSA Population | Major League Venues | | |
|---|---|---|---|---|
| | | Venues | Total Seats | Seats per Capita |
| Las Vegas | 2,359,915 | 2 | 85,000 | 0.036 |
| Seattle | 4,152,259 | 3 | 133,783 | 0.032 |
| San Francisco | 4,788,510 | 3 | 128,864 | 0.027 |
| Miami | 6,240,482 | 5 | 163,172 | 0.026 |
| Phoenix | 5,069,353 | 3 | 129,974 | 0.026 |
| Boston | 5,017,305 | 3 | 123,213 | 0.025 |
| **San Diego** | **3,325,723** | **2** | **77,445** | **0.023** |
| Washington D.C. | 6,535,041 | 4 | 139,902 | 0.021 |
| Chicago | 9,584,302 | 4 | 167,264 | 0.017 |
| Los Angeles | 13,179,586 | 5 | 218,290 | 0.017 |
| Orlando | 2,831,437 | 2 | 44,000 | 0.016 |
| Austin | 2,499,236 | 1 | 20,738 | 0.008 |
| Average | 5,734,901 | 3.3 | 128,264 | 0.024 |

San Diego offers an average amount of major league sprots seating for a market of its size. Las Vegas has the most seats per capita due to the large amount of leisure travel in Las Vegas.

## MLB Venues Capacity

| MLB Venue | Peer Destination | Total Capacity |
|---|---|---|
| Dodger Stadium | Los Angeles | 56,000 |
| Chase Field | Phoenix | 48,405 |
| T-Mobile Park | Seattle | 47,929 |
| Angel Stadium | Anaheim | 45,517 |
| Wrigley Field | Chicago | 41,649 |
| Nationals Park | Washington D.C. | 41,339 |
| Oracle Park | San Francisco | 41,265 |
| Guaranteed Rate Field | Chicago | 40,615 |
| **Petco Park** | **San Diego** | **40,209** |
| Fenway Park | Boston | 37,755 |
| LoanDepot Park | Miami | 37,442 |

When compared with peer venues, Petco Park is one of the newest stadiums. Petco Park is the 23rd largest stadium in major league baseball nationally and is the ninth largest among the set of peer cities. Although newer stadiums like Petco Park have smaller seating capacities, they are developed with far more social amenities. Upgrades to the Gallagher Square area of Petco Park are expected to enhance its ability to host concert events.

**The following shows SWOT analysis of Petco Park.**

### STRENGTHS
i. Hosts large number of non-baseball events
ii. Adjacency to SDCC enables convention events to expand (Comic-Con)
iii. Variety of event spaces

### OPPORTUNITIES
i. Development of entertainment district adjacent to stadium
ii. Renovation of Gallagher Square to host more concert events

### WEAKNESSES
i. Smaller than other baseball stadiums
ii. Limited available event dates on calendar

### THREATS
i. Development of Gaylord adds competition for non-baseball events
ii. Limited expansion opportunities of event space or seating capacity

## MLS Venues Capacity

| MLB Venue | Peer Destination | Total Capacity |
|---|---|---|
| Lumen Field* | Seattle | 68,740 |
| Gillette Stadium* | Boston | 65,878 |
| Soldier Field* | Chicago | 61,500 |
| **Snapdragon Stadium** | **San Diego** | **35,000** |
| Dignity Health Sports Park | Los Angeles | 27,000 |
| Inter&Co Stadium | Orlando | 25,500 |
| DRV PNK Stadium | Miami | 21,550 |
| Q2 Stadium | Austin | 20,738 |
| Audi Field | Washington D.C. | 20,000 |

Snapdragon Stadium is the largest non-NFL stadium among the set of peer cities and is expected to significantly increase tourist visitation to San Diego. San Diego FC will enter the MLS in 2025. MLS set attendance records in 2023 with 10.9 million attendees. It has the highest growth rate of any major league sport. In addition, due to its proximity to a devoted fan base in Mexico, San Diego is well positioned to support the new MLS team.

**The table shows SWOT analysis of Snapdragon Stadium.**

**STRENGTHS**
i. New stadium that can host multiple sports events as well as concerts
ii. Multiple sports teams committed as tenants at venue
iii. Located near transit

**OPPORTUNITIES**
i. Development of surrounding district with residential, retail, biotech, SDSU facilities

**WEAKNESSES**
i. Lack of roof makes events vulnerable to weather
ii. Grass surface requires replacement multiple times per year

**THREATS**
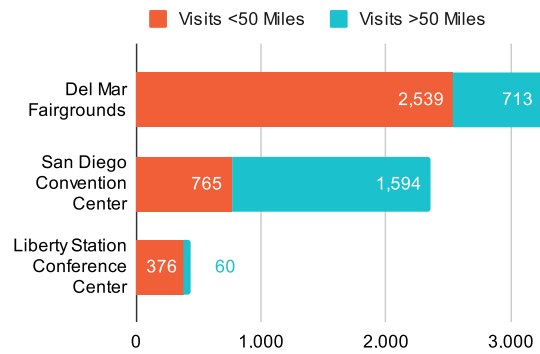i. Difficulty of ingress and egress during high traffic periods hurting customer experience

# Convention & Meeting Venues

HVS examined visitation to professional and major amateur sports venues in San Diego in 2023. HVS broke out visitation by the 50-mile and 150-mile radius to evaluate the level of out of market and overnight visitation to each venue.
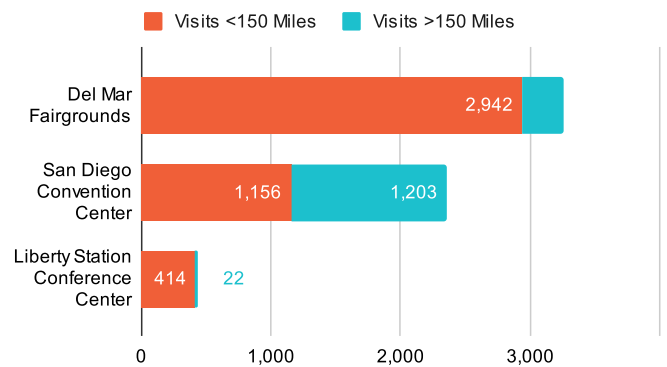
**Key Takeaways:**

• **The SDCC attracts large out-of-town groups with high room block needs due to the large hotels adjacent.** It offers the most adjacent hotel rooms of the set of peer cities and attracts 60% of attendees from outside the San Diego market area and more than 50% overnight stays from outside 150 miles of the venue. With more than 5,300 adjacent hotel rooms, the SDCC can offer the largest room block of any of the peer cities. It has the smallest ratio of hotel rooms to function space. The SDCC has sufficient demand to allow it to be selective in the types and sizes of events it accepts. The SDCC benefits from hosting a large share of medical and pharmaceutical events.

• **Expansion of the SDCC is highly uncertain.** Ongoing litigation has stalled work on SDCC expansion indefinitely. Most industry participants have little expectation that expansion will occur soon and are planning accordingly. Austin is the only benchmarked city that is planning a significant expansion of its convention center, promising some stability in the highly competitive convention industry. Fortunately, earlier fears that many large events will outgrow the SDCC and leave San Diego have not been realized. San Diego should focus on accommodating large events by using adjacent venues and enhancing the visitor experience with concurrent entertainment events.

• **The SDCC enjoys proximity to ample lodging and visitor amenities.** Near the Gaslamp District and Downtown San Diego, SDCC event attendees can easily walk to a diverse selection of recreation, retail, and dining. Event attendees prefer amenities to be within walking distance after an event. The location of the SDCC near two major entertainment districts enables event attendees to easily walk to a variety of different entertainment options.

## Convention and Meeting Visits in 2023 (in thousands)

Legend: ■ Visits <50 Miles   ■ Visits >50 Miles

| Venue | Visits <50 Miles | Visits >50 Miles |
|---|---|---|
| Del Mar Fairgrounds | 2,539 | 713 |
| San Diego Convention Center | 765 | 1,594 |
| Liberty Station Conference Center | 376 | 60 |

Source: Placer.ai

## 150-mile

Legend: ■ Visits <150 Miles   ■ Visits >150 Miles

| Venue | Visits <150 Miles | Visits >150 Miles |
|---|---|---|
| Del Mar Fairgrounds | 2,942 | |
| San Diego Convention Center | 1,156 | 1,203 |
| Liberty Station Conference Center | 414 | 22 |

Source: Placer.ai

Although annual visitation to Del Mar Fairgrounds is highest across meetings/conventions venues, the San Diego Convention Center attracts far more out-of-town visitation. Del Mar's events also tend to attract more local visitors, including a wide variety of events such as the annual County Fair, horse racing, equestrian events, animal shows, consumer shows, musical entertainment, and community events.

Expanding the radius to 150 miles shows the impact of the San Diego Convention Center, which generates more than 50% of its visits from more overnight attendees. Despite generating fewer total visits than Del Mar Fairgrounds, the SDCC attracts nearly four times as many overnight attendees.

**The following shows SWOT analysis of the San Diego Convention Center.**

**STRENGTHS**

i. Massive event demand
ii. Large number of adjacent hotel rooms
iii. Proximity to downtown and Gaslamp Quarter
iv. Use of adjacent event spaces (Petco Park, Rady Shell)

**OPPORTUNITIES**

i. Develop new expanded function spaces to meet updated event planner needs

**WEAKNESSES**

i. Limited function spacevulnerable to weather
ii. Unclear timeline for potential expansion including difficult legal process
iii. Limited air access

**THREATS**

i. Losing events that outgrow facility
ii. Competitor facilities renovating and expanding (Seattle, Las Vegas)

## Benchmarking Convention Centers

HVS compared the SDCC to the set of peer cities on the share of out of market visitors, the number of adjacent rooms to the convention center, and the number of amenities within walking distance of the venue, including hotels, art & entertainment, retail, and dining and drinking establishments.

| Convention Center | Share Of Visitors From 50 < Miles |
|---|---|
| Orange County Convention Center | 86% |
| Las Vegas Convention Center | 82% |
| Austin Convention Center | 80% |
| **San Diego Convention Center** | **68%** |
| Phoenix Convention Center | 60% |
| Boston Convention & Exhibition Center | 59% |
| Walter E. Washington Convention Center | 52% |
| Seattle Convention Center | 43% |
| Miami Beach Convention Center | 42% |
| Los Angeles Convention Center | 39% |
| Moscone Convention Center | 35% |
| Hawai`i Convention Center | 26% |

San Diego ranks 4th in percentage of visitors who come from over 50 miles, relative to its competitive peer set. It attracts substantially more attendees from more than 50 miles than other west coast competitors like Los Angeles and San Francisco.

| Convention Center | Share Of Visitors From 150 < Miles |
|---|---|
| Orange County Convention Center | 86% |
| Las Vegas Convention Center | 81% |
| Austin Convention Center | 65% |
| Phoenix Convention Center | 56% |
| **San Diego Convention Center** | **51%** |
| Boston Convention & Exhibition Center | 45% |
| Walter E. Washington Convention Center | 42% |
| Miami Beach Convention Center | 37% |
| Moscone Convention Center | 31% |
| Los Angeles Convention Center | 29% |
| Seattle Convention Center | 22% |
| Hawai`i Convention Center | 22% |

More than half of all visits to the SDCC are by someone who lives more than 150 miles away. This ranks fourth among the set of peer city convention centers. Phoenix passes the SDCC when the radius is moved from 50 miles to 150 miles, due to the size of the southern California market and lack of a comparable population center within 150 miles of Phoenix.

| Convention Center | Peer Destination | Total Function Space (SF) |
|---|---|---|
| Las Vegas Convention Center | Las Vegas, NV | 2,843,668 |
| Orange County Convention Center | Orlando, FL | 2,448,990 |
| Walter E. Washington Convention Center | Washington DC | 896,502 |
| Los Angeles Convention Center | Los Angeles, CA | 870,806 |
| Moscone Convention Center | San Francisco, CA | 866,861 |
| **San Diego Convention Center** | **San Diego, CA** | **813,641** |
| Seattle Convention Center | Seattle, WA | 742,771 |
| Phoenix Convention Center | Phoenix, AZ | 730,416 |
| Boston Convention & Exhibition Center | Boston, MA | 706,746 |
| Miami Beach Convention Center* | Miami, FL | 680,832 |
| Austin Convention Center | Austin, TX | 370,351 |
| Hawai`i Convention Center | Honolulu, HI | 333,924 |
| | **Average** | **1,025,459** |
| | **Average w/o Las Vegas & Orlando** | **701,285** |

While HVS included Las Vegas and Orlando in this set, they primarily seek to attract events that do not fit into the SDCC. However, the SDCC competes with them for smaller conventions and other events. If these two venues are included, the average increases by more than 300,000 square feet of function space and San Diego offers a below average amount. If we exclude these two, San Diego sits above the average function space.

| Convention Center | Peer Destination | Total Adjacent Rooms |
| --- | --- | --- |
| **San Diego Convention Center** | **San Diego, CA** | **5384** |
| Orange County Convention Center | Orlando, FL | 5192 |
| Moscone Convention Center | San Francisco, CA | 4038 |
| Las Vegas Convention Center | Las Vegas, NV | 3503 |
| Seattle Convention Center | Seattle, WA | 3128 |
| Austin Convention Center | Austin, TX | 2860 |
| Boston Convention & Exhibition Center | Boston, MA | 2274 |
| Phoenix Convention Center | Phoenix, AZ | 1693 |
| Walter E. Washington Convention Center | Washington DC | 1175 |
| Los Angeles Convention Center | Los Angeles, CA | 1002 |
| Miami Beach Convention Center* | Miami, FL | 800 |
| Hawai`i Convention Center | Honolulu, HI | 0 |

There are more than 5,300 adjacent hotel rooms to the SDCC making it a highly competitive conventions venue offering the largest room block of any of its peer destinations. The San Diego Convention Center has the most adjacent rooms among the set of peer cities, nearly twice the average of the set.

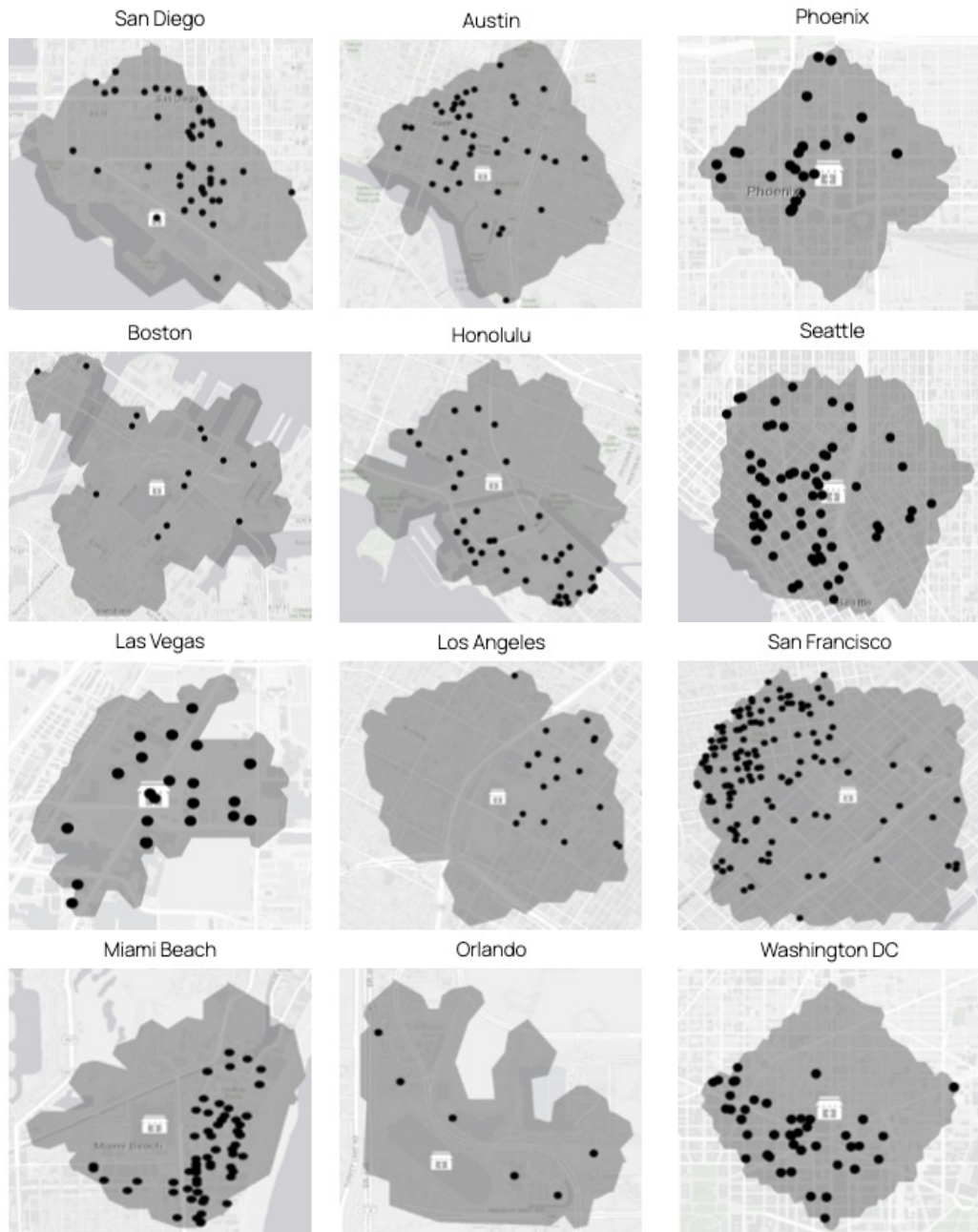| City | Convention Center | Adjacent Rooms | Total Function Space | Function Space Per Room |
|---|---|---|---|---|
| **Los Angeles** | Los Angeles Convention Center | 1002 | 870806 | 869 |
| Miami | Miami Beach Convention Center* | 800 | 680832 | 851 |
| Las Vegas | Las Vegas Convention Center | 3503 | 2843668 | 812 |
| Washington D.C. | Walter E. Washington Convention Center | 1175 | 896502 | 763 |
| Orlando | Orange County Convention Center | 5192 | 2448990 | 472 |
| Phoenix | Phoenix Convention Center | 1693 | 730416 | 431 |
| Boston | Boston Convention & Exhibition Center | 2274 | 706746 | 311 |
| Seattle | Seattle Convention Center | 3128 | 742771 | 237 |
| San Francisco | Moscone Convention Center | 4038 | 866861 | 215 |
| San Diego | **San Diego Convention Center** | **5384** | **813641** | **151** |
| Austin | Austin Convention Center | 2860 | 370351 | 129 |
| Honolulu | Hawai`i Convention Center | 0 | 333924 | |

San Diego has the lowest ratio of function space per room among peer cities with hotels adjacent to the convention center. Los Angeles has the most with more than 850 sf per adjacent room, followed by Miami with just over 850. Austin has the least of venues with an adjacent hotel, however the facility is beginning an expansion process that will increase the function space available.

# Convention Center Amenity Availability Benchmarking

Besides the facility itself, event planners also choose event venues based on the surrounding amenities for event attendees. Planners prefer venues with more hotels, arts & entertainment, retail, dining and drinking establishments within a short walk of the venue. This gives event attendees something to do before or after their event. Using data from ESRI, HVS compiled data on the location and number of amenities within a 15-minute walk of each convention center in the set of peer cities.

**Hotel Locations Within 15-Minute Walk of Convention Center**



San Diego

Austin

Phoenix

Boston

Honolulu

Seattle

Las Vegas

Los Angeles

San Francisco

Miami Beach

Orlando

Washington DC

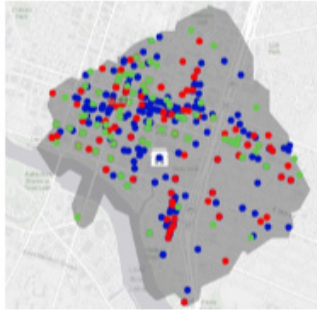# Amenity Locations Within 15-Minute Walk of Convention Center
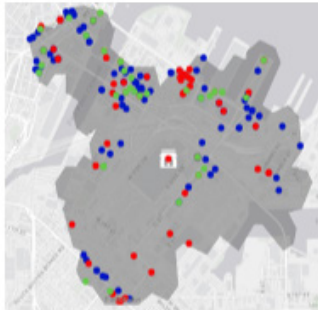
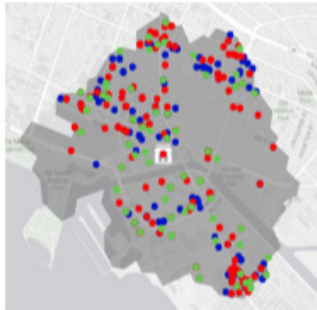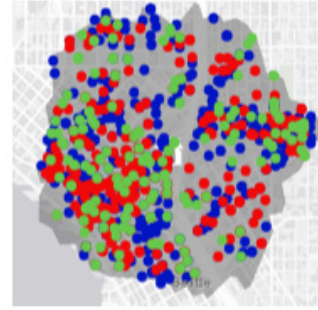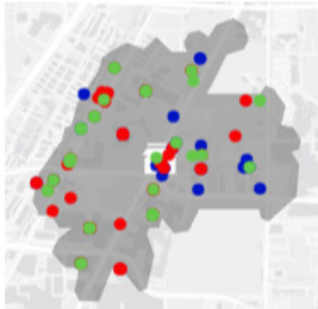🔴 Retail   🔵 Restaurants, Bars & Clubs   🟢 Art & Entertainment
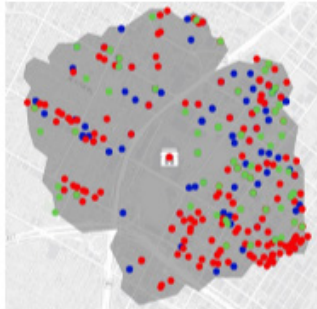


San Diego



Austin



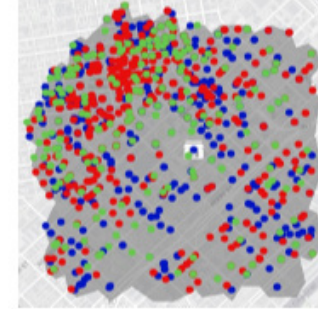Phoenix



Boston



Honolulu



Seattle



Las Vegas
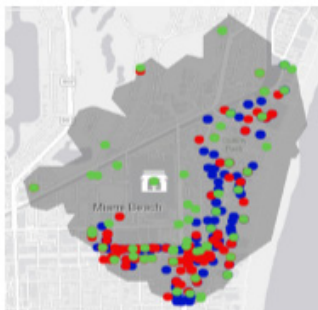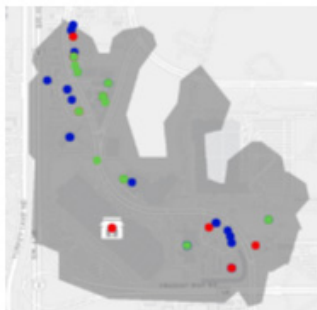


Los Angeles



San Francisco



Miami Beach



Orlando
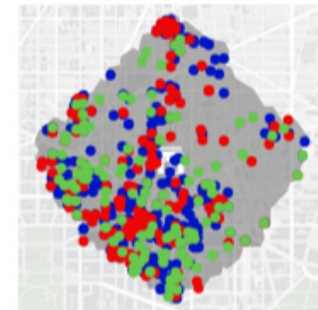


Washington DC

## Amenities Within 15-Minute Walk of Convention Center

| | Hotels | Art / Entertainment | Retail | Dining & Drinking | Total |
|---|---|---|---|---|---|
| Moscone Convention Center | 155 | 270 | 798 | 793 | 2016 |
| Seattle Convention Center | 88 | 178 | 504 | 704 | 1474 |
| Walter E. Washington Convention Center | 69 | 157 | 264 | 424 | 914 |
| Hawai`i Convention Center | 52 | 100 | 404 | 324 | 880 |
| **San Diego Convention Center** | **64** | **105** | **247** | **429** | **845** |
| Austin Convention Center | 48 | 116 | 161 | 361 | 686 |
| Los Angeles Convention Center | 24 | 90 | 248 | 208 | 570 |
| Las Vegas Convention Center | 39 | 45 | 282 | 193 | 559 |
| Miami Beach Convention Center | 75 | 76 | 148 | 222 | 521 |
| Phoenix Convention Center | 27 | 70 | 76 | 224 | 397 |
| Boston Convention & Exhibition Center | 17 | 40 | 69 | 142 | 268 |
| McCormick Place | 9 | 32 | 22 | 96 | 159 |
| Orange County Convention Center | 9 | 21 | 17 | 60 | 107 |

In addition to the large amount of hotel rooms adjacent to the convention center, the SDCC offers a wide range of amenities to convention visitors within a 15-min walk of the venue. San Diego ranks 3rd in food and beverage establishments within close proximity and 5th in total amenities.

# To grow and diversify events in San Diego, we need to leverage our breadth of venues and partners.

"Host seminars to guide new event planners through the process for hosting an event."

"There is generally a lack of communication about different types of venues that are available for use throughout the City (Universities, Museums, Plazas)."

"New event planners are struggling with requirements to host events in San Diego."

"There is limited availability at major venues due to a large number of events and demand for dates."

"We need to use and market smaller venues in San Diego as potential event locations/sites, such as museums and universities."

# SUSTAINABILITY

Over the last 20 years, many organizations have diligently endeavored to establish sustainability and stewardship as key pillars of the expansive global travel and tourism industry. One of the most successful approaches has been the development of sustainable tourism standards.

Sustainability standards are established by consensus, approved by recognized and impartial bodies, and define social and environmental practices, guidelines, and/or characteristics for activities within an industry,. When a business or destination meets a sustainability standard, they provide assurance to customers that they are operating according to agreed upon and verified criteria. Additionally, standards can be used as a planning and evaluation tool to measure performance against the sustainability criteria and to define action items for improvements over time.

Tourism Impact Services (TIS) conducted a sustainable destination diagnostic based on the global standards for sustainability in travel and tourism produced by the Global Sustainable Tourism Council (GSTC), using the GSTC-Recognized Mountain IDEAL Standard. Designed with nature-based destinations in mind, the Mountain IDEAL standard utilizes the GSTC-Destination principles as the foundation, then defines how outdoor communities can implement those best practices. World-renowned destinations from California, Colorado, Utah, and Alaska have benefited from TIS's Sustainable Destination Diagnostic for strategic planning and certification.

The diagnostic identifies the current policies, programs, projects, and products that support sustainable tourism in line with the GSTC-D Criteria and UN Sustainable Development Goals (SDGs). There is a powerful connection between the GSTC Criteria and the SDGs. In 2015, the UN set an ambitious 15-year plan to address some of the most pressing global issues by 2030. "The SDGs are a universal call to action by all countries, regardless of their economic status, to promote prosperity while protecting the planet. They recognize that ending poverty must go hand-in-hand with strategies that build economic growth and address a range of social needs including education, health, social protection, and job opportunities, while tackling climate change and environmental protection". By utilizing a GSTC-Recognized Standard, destinations are helping to do their part to meet the UN SDGs through analysis and action to address economic, environmental and social impacts.

For additional information, a summary about the Mountain IDEAL Standard, including a list of all best practices analyzed for the diagnostic, and the UN Sustainable Development Goals they help to address, are included in the appendix of this report.

This Sustainable Destination Diagnostic Report outlines San Diego's current sustainable destination performance, highlighting key areas of progress, challenges, and

opportunities. The results of the diagnostic will inform recommendations to leverage existing plans and efforts and/or what new initiatives should be prioritized moving forward. Utilizing these global standards will ensure effective alignment with other sustainability and stewardship efforts at the local, regional, state, and national levels, including Visit California's current Regional Strategic Tourism Plans project.

## Methodology

The Sustainable Destination Diagnostic is a strategic planning methodology designed to assess performance on international standards that define best practices for sustainable destination management. The evaluation is conducted by experienced auditors and sustainability standards experts, but the diagnostic is not intended as an audit that would result in certification. For the San Diego Tourism Stewardship Plan update project, the diagnostic was used to establish a baseline understanding of San Diego's alignment with global sustainable tourism best practices and to inform priority actions to include in the plan update.

To commence the diagnostic, extensive desktop research was undertaken to gather publicly available evidence. This research aimed to identify the policies, plans, programs, and projects that support sustainable tourism within the destination. While the desktop research provided valuable insights, it was unable to cover all aspects of the best practices defined by the sustainable destination standards. To supplement the research, the team conducted interviews with tourism industry and sustainability leaders, including but not limited to the San Diego Tourism Authority, San Diego Audubon, San Diego Working Waterfront, San Diego River Park Foundation, San Diego Coastkeeper, San Diego County Bicycle Coalition, and the City of San Diego Mayor's Office, Department of Sustainability and Mobility, and Department of Parks and Recreation. The information provided by stakeholders further enhanced the team's understanding of the destination's strengths and identified areas with room for improvement.

Once the desktop research and interviews were completed, an independent auditor thoroughly reviewed all available materials, identified any compliance gaps, and evaluated San Diego's current sustainable destination performance for each best practice. This allowed for the identification of key areas of progress, challenges, and opportunities. Each practice was given a score of 0-5 which formed a scorecard representing the destination's sustainability performance. Finally, the research and audit findings were summarized and organized around the nine sustainable destination themes.

By undertaking this comprehensive diagnostic process, this report aims to provide a holistic overview of San Diego's sustainable destination performance and offer valuable insights for future enhancements in line with international best practices.

## Understanding The Diagnostic Score

For the Sustainable Destination Diagnostic process, the team employed the Mountain IDEAL Standard, which has been formally recognized by the Global Sustainable Tourism Council (GSTC). This standard encompasses 50 best practices categorized under four sustainable destination pillars and nine sustainable destination themes. Each best practice includes multiple implementation guidelines that describe specific activities that should be well-established to be considered in full compliance. Additionally, there are specific evidence requirements needed to support the proof of compliance for the activities. Therefore, the bar is high for a criteria to be in full compliance.

Each of the 50 individual best practices was scored using a 0-5 scale. The diagnostic scoring matrix evaluates the range of implementation from initiation of activities to exceeding the standard.

The scores of each best practice in a given theme were then aggregated to produce results at the theme level. The "themes" were scored by determining Total Possible Points per each of the nine themes, then the sum of each theme was divided by Total Points achieved. This resulted in a Theme Diagnostic Score. All Theme Diagnostic Scores were averaged which resulted in the Overall Diagnostic Score.

A score of 0.40 is evidence of good performance. A score of 0.80 or higher is necessary for certification.

• 0 indicates the criteria/practice was not implemented

• 1 or 2 indicates early stages of activity implementation

• 3 indicates partial compliance to the letter of the standard

• 4 indicates full compliance to the letter of the standard

• 5 indicates implementation of activities that exceed the standard

**Destination Diagnostic**

## Overall Destination Score

| Sustainable Destination Themes | Diagnostic Score |
|---|---|
| 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 |

| | |
|---|---|
| Some activites need attention | 0 - 0.3 |
| Many activites are in progress; and/or some areas of partial compliance | 0.4 - 0.6 |
| Most activities are in progress; and/or partial and full compliance | 0.7+ |

**OVERALL PERFORMANCE**

- 🔴 0 - NO ACTIONS
- 🟠 1 - INITIATION
- 🟡 2 - BASELINE ACTIONS
- 🩷 3 - PARTIAL COMPLIANCE
- 🔵 4 - FULL COMPLIANCE
- 🟢 5 - ABOVE & BEYOND

**01**
## Enabling Environment

| | | | | | |
|---|---|---|---|---|---|
| STEWARD-SHIP COUNCIL | DESTINATION MGMT PLAN | IMPACT MONITOR SYSTEM | ECON IMPACT MONITOR | VISITOR VOLUME MONITOR | VISITOR SATISFACTION MONITOR |
| COMP MASTER PLAN | LAND USE REGS | TOURISM DEVT REGS | ENVT IMPACT REGS | HUMAN RIGHTS | EQUITY FOR ALL | COMMUNAL PROPERTY RIGHTS |
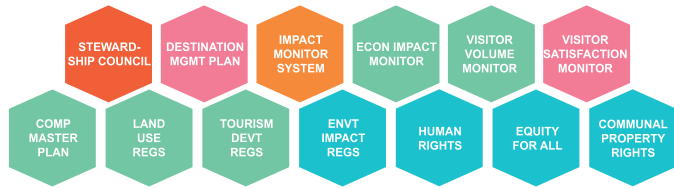
**02**
## Visitor & Asset Management

| VISITOR MGMT SYSTEM | ASSET INVENTORY | STEWARD-SHIP FUND | VISITOR BEHAVIOR GUIDELINE | INTER-PRETIVE INFO | TOURISM CARRYING CAPACITY | SUSTAI-NABLE TRANSPORT | WALKABILITY & TRAIL INFRA STRUCTURE | REC RESOURCE STEWARD-SHIP |
| NATURAL HERITAGE CONSERVA-TION | SPECIES & HABITAT PROTECTION | WILDLIFE INTERAC-TIONS | INTANGIBLE HERITAGE CELEBRA-TION | CULTURAL HERITAGE CONSERVA-TION | HERITAGE SITE ACCESS | EQUITABLE ACCESS FOR ALL | DESTINA-TION MARKETING |

**03**
## Community Transformation

| RESIDENT SENTIMENT | COMMUNITY PARTICIPA-TORY PLANNING | SUSTAIN-ABLE BIZ PROGRAMS | LAND MANAGER ENGAGE-MENT | COMMUNITY ENGAGE-MENT PROGRAMS | AFFORDABLE HOUSING PROGRAMS | EMPLOYMENT & TRAINING OPP |
| LOCAL & REGIONAL SUPPLY CHAINS | RISK & RESILIENCE ASSESS-MENT | CLIMATE ACTION PLANNING | EMERGENCY RESPONSE | SAFETY & SECURITY | PUBLIC HEALTH |

**04**
## Environmental Sustainability

| WASTE MGMT | WATER MGMT | WATER QUALITY | WASTE WATER MGMT | ENERGY MGMT | EMISSIONS MGMT | POLLUTION MGMT |

# Sustainable Destination Theme Evaluation

The following analysis provides an evaluation of performance for each of the nine sustainable destination themes. Each theme evaluation includes the scorecard for all best practices within the theme, the purpose and impact of the collective theme activities, destination diagnostic of performance, and key attributes that exist in the destination that can be built upon.

## Destination Diagnostic - Sustainable Destination Theme and Best Practices

| Theme 1 - Stewardship Planning | Diagnostic Score (0-5) |
|---|---|
| Destination Stewardship Council | 0 |
| Destination Management Plan | 3 |
| Economic Impact Monitoring | 5 |
| Visitor Volume Monitoring | 5 |
| Visitor Satisfaction Monitoring | 3 |
| Destination Stewardship Monitoring | 1 |
| Theme Score | 0.57 |

**Purpose:** Convening stakeholders for shared management toward a long-term vision.

**Impact:** This theme sets the foundation for destination stewardship. Through a commitment to community collaboration, strategic planning, and impact monitoring, a culture of continuous improvement is established. These foundational best practices are critical for enhancing resident and visitor engagement, communicating the destination's vision of stewardship and sustainability, and partnering with community stakeholders to implement impactful projects and measure overall success.

**Destination Diagnostic:** San Diego, California is an iconic global destination led by high-performing tourism leadership organizations. The San Diego Tourism Authority (SDTA) has initiated a Tourism Stewardship Master Plan update to thoroughly evaluate all relevant conditions in the destination to support sustainable destination growth and management. To help direct the outcomes of the plan, the SDTA has established a diverse steering committee that has the potential to evolve into an established 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 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.

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. The diagnostic also revealed there are destination stakeholders, such as the City of San Diego, monitoring socio-cultural and environmental indicators, but the SDTA lacks a holistic system that aggregates the comprehensive data and interprets the full scope of impacts, specifically as it relates to tourism. To ensure the destination can effectively respond to tourism impacts, it is recommended the destination establish a coordinated system that collects a variety 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.

**Existing Attributes to Build Upon:**

**Resources**
- Experience San Diego Destination 2040 (first master plan)
- Blueprint SD and General Plan Amendment
- City of Villages Strategy
- Climate Action Plan
- Community Plans
- San Diego Foundation Economic Equity Report 2023
- San Diego Tourism Annual Report
- San Diego Tourism Industry Research Resources
- SANDAG Regional Transportation Plan
- Tourism Matters San Diego (video)
- Visitor and Resident Sentiment Surveys

**Stakeholders**
- San Diego Tourism Stewardship Plan Steering Committee
- City of San Diego
- County of San Diego
- Downtown San Diego Partnership
- Port of San Diego
- San Diego Convention Center
- San Diego County Lodging Association
- San Diego Gas & Electric
- San Diego Regional Airport Authority
- San Diego Regional Chamber of Commerce
- San Diego Regional EDC
- San Diego State University
- San Diego Symphony
- San Diego Tourism Authority
- San Diego Tourism Marketing District
- San Diego Zoo Wildlife Alliance
- SANDAG
- Sports San Diego
- State of California
- Urban Kitchen Group

## Destination Diagnostic - Sustainable Destination Theme and Best Practices

| Theme 2 - Regulatory Framework | Diagnostic Score (0-5) |
| --- | --- |
| Long Range Comprehensive Plan | 5 |
| Land Use Regulations | 5 |
| Tourism Development Regulations | 5 |
| Environmental Impact Regulations | 4 |
| Human Rights | 4 |
| Equity for All | 4 |
| Community Property Rights | 4 |
| **Theme Score** | **0.89** |

**Purpose:** Enabling policies and programs aligned with international regulations and best practices for sustainable development.

**Impact:** This theme establishes compliance to federal and state regulations and emphasizes a need for stronger local regulatory frameworks to ensure sustainable development outcomes. This is evidenced in specific regulations, policies and procedures to ensure the protection of human rights, the local environment, community infrastructure, residents' quality of life and visitor services.

**Destination Diagnostic:** As a destination in the United States, San Diego should be recognized for their efforts to adopt regulatory legislation that strives for sustainable development outcomes. The city is outperforming most destinations in regards to their land use, environmental impact, and tourism development regulations. The destination has an impressive range of policies, plans and regulations to guide the sustainable development and responsible use of natural and cultural resources, and public services. The city's recently updated General Plan, Blueprint SD, is addressing numerous sustainability challenges such as: Land Use and Community Planning, Mobility, Urban Design, Economic Prosperity, Public Facilities, Services and Safety, Recreation, Conservation, and Noise.

Additionally, there is considerable implementation on equity throughout the destination. The SDTA hired their first-ever Director of Diversity, Equity & Inclusion and Community Engagement who implements recommendations from the Tourism Diversity Matters assessment, and 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 and tap into the local tourism industry. Finally, an impactful example of Indigenous leadership for land conservation and restoration is the ReWild Mission Bay project. In partnership with the San Diego Audubon Society and 75 ReWild Coalition community partners, the project seeks to enhance and restore natural wetlands in Mission Bay, the historic home of the Indigenous Kumeyaay communities of 'lipay and Tipai.

**Existing Attributes to Build Upon:**

**Resources**
- AARP Parks and Public Spaces Collection
- Age Friendly San Diego Action Plan
- Beach Concessionaires
- Blueprint SD and General Plan Amendment
- Blueprint SD Land Use and Community Planning Element
- Build Better SD
- City of Villages Strategy
- Climate Action Plan
- Community Plans
- County of San Diego Local Coastal Program
- Cultural Resources at the Museum of Us
- Equity Forward SD
- Park use Permits
- Public Art Master Plan
- San Diego County Indigenous Culture Resources
- San Diego County Land Use Element
- San Diego County Local Coast Program
- San Diego Culture Plan
- San Diego Natural Resource Management Plans (multiple)
- San Diego Parks Master Plan
- SANDAG Regional Transportation Plan
- Short-Term Residential Occupancy (STRO) regulations
- SRO Hotel Regulations
- Transient Occupancy Tax (TOT)/Tourism Marketing District (TMD)

**Stakeholders**
- Alliance San Diego
- City of San Diego
- City of San Diego Human Relations Commission
- County of San Diego
- Human and Civil Rights Resources from the City of San Diego (organizations, committees, regulations, policies and educational information)
- Port of San Diego
- San Diego County Office of Equity and Racial Justice
- San Diego Equality Business Association
- San Diego Foundation
- San Diego Regional EDC
- San Diego Tourism Authority
- San Diego Tourism Marketing District
- San Diego Workforce Partnership
- SANDAG
- State of California

## Destination Diagnostic - Sustainable Destination Theme and Best Practices

| Theme 3 - Visitor Management | Diagnostic Score (0-5) |
|---|---|
| Asset Inventory | 1 |
| Stewardship Fund | 3 |
| Visitor Management System | 0 |
| Visitor Behavior Guidelines | 3 |
| Interpretive Information | 3 |
| Tourism Carrying Capacity | 2 |
| Theme Score | 0.40 |

**Purpose:** Understanding and managing visitor use, flows and impacts.

**Impact:** Visitors are central to the tourism industry, and their impacts require formalized management approaches to ensure the sustainability of tourism assets such as public lands, tangible and intangible cultural heritage, and community infrastructure. Best practices to mitigate negative impacts may include engagement education, infrastructure investments, and enhancement of visitor experiences.

**Destination Diagnostic:** San Diego is known for having a wealth of world-class assets including but not limited to: miles of accessible beaches, a diverse cultural scene, world-class dining, and family-friendly attractions such as the San Diego Zoo and Balboa Park, set against a backdrop of a temperate climate. Various databases of tourism businesses populate the SDTA's websites; however, an inventory that tracks visitation and visitor impacts at all attractions and assets throughout the destination is absent. It should be noted that a low score on Visitor Management System and Tourism Carrying Capacity is expected until a destination can fully plan for and implement the numerous steps required within the best practices. That being said, this comprehensive approach to asset stewardship and visitor management is pivotal to sustainable destination management. To increase the level of compliance with sustainable destination management standards, it is recommended that the SDTA and destination stakeholders:

1. Establish an up-to-date asset and impact inventory that identifies all natural, cultural and/or historic assets, attractions, or sites that constitute the primary touristic and outdoor recreational offerings of the destination; describes key features and characteristics; and includes applicable management structures or responsibilities, capacity and visitor use patterns, and socioeconomic, cultural and environmental benefits, risks, threats and/or sensitivities that can help inform and prioritize destination and visitor management strategies.

2. Conduct tourism capacity monitoring by estimating the physical, social, and/or ecological carrying capacity of key sites in order to prevent, mitigate, and/or recover from the impacts from overcrowding and overuse; inform sustainable visitor use management strategies; mitigate the seasonality of tourism; and enhance the visitor experience and improve residents' quality of life.

3. Aggregate and/or create visitor use and management strategies, plans, and/or systems designed to monitor and optimize visitor volumes, flows, and activities within and around its primary natural and cultural attractions/sites; this aggregate plan should consider the site capacities, sensitivities, and risks identified in its asset inventory, and the needs of the local economy, community, culture, and environment. The visitor management system/plan should help to identify priorities, assign roles and responsibilities, and establish mechanisms for cross-institutional collaboration to effectively minimize adverse impacts. The visitor management system/plan should detail what actions should be taken and when to manage visitor volumes and activities, such as reducing or increasing them at certain times or locations as necessary.

The diagnostic revealed that there is no destination-wide visitor education messaging about how to responsibly and respectfully experience San Diego. At the attraction level, popular sites including the San Diego Zoo, Mission Bay, Balboa Park, and public beaches and parks have interpretive signage and visitor behavior guidelines. Lifeguards on beaches and rangers in parks provide essential visitor education services. Forever Balboa Park and the City of San Diego are working together to update wayfinding and interpretive signage to enhance the visitor experience through new, bilingual, cohesive signage across the 1,200 acres of Balboa Park. As the destination's tourism authority, it is recommended the SDTA fortify partnerships with lead attractions and land managers and develop simple and effective visitor education campaigns that encourage visitors and recreationists to follow key principles that help protect all of San Diego's natural and cultural assets.

An illustrative example of the systemic approach to visitor management is the closure of Point La Jolla and Boomer Beach to protect sea lions from visitor harassment, highlighting the intersection of tourism carrying capacity, visitor education, and wildlife welfare.

**Existing Attributes to Build Upon:**

**Resources**
- Blueprint SD and General Plan Amendment
- Community Enhancement (CE) Program
- Community Plans
- Economic Development Funding Program
- Experience San Diego Destination 2040 (first master plan)
- Forever Balboa Park Wayfinding and Signage
- Get Outside San Diego
- Visit San Diego promotion/education videos
- Visit San Diego visitor safety and responsibility information
- Visitor and Resident Sentiment Surveys
- Visit San Diego website

**Stakeholders**
- City of San Diego Department of Parks and Recreation
- Cultural and natural heritage attractions, parks and recreation sites
- Forever Balboa Park
- I Love A Clean San Diego
- Port of San Diego
- San Diego Foundation
- San Diego Professional Tour Guide Association
- San Diego Tourism Authority
- San Diego Tourism Marketing District
- San Diego Zoo Wildlife Alliance
- Tourism Stewardship Plan Steering Committee

## Destination Diagnostic - Sustainable Destination Theme and Best Practices

| Theme 4 - Natural & Cultural Heritage | Diagnostic Score (0-5) |
|---|---|
| Natural Heritage Conservation | 4 |
| Species and Habitat Protections | 4 |
| Wildlife Interactions | 3 |
| Intangible Heritage Celebration | 4 |
| Cultural Heritage Conservation | 4 |
| Heritage Sire Access | 4 |
| **Theme Score** | 0.77 |

**Purpose:** Celebrating and conserving the uniqueness of the destination.

**Impact:** Protecting and interpreting the rich natural and cultural heritage of the destination and surrounding area is critical to sustaining a quality visitor experience and resident quality of life. This is especially true when the primary assets of the destinations are sensitive public lands and in a region rich with Native American culture. The practices of this theme aim to celebrate, manage and protect the heritage, habitats, wildlife and cultures of the destination through regulations, engagement and education.

**Destination Diagnostic:** Like other destinations in the United States, San Diego has adequate protection of natural and cultural heritage by way of the federal and state regulations related to endangered species, land management, and historic preservation. This is of critical importance as San Diego County has more animals and plants on the endangered species list than any other county in the U.S. There is a strong ecosystem of environmental conservation organizations and programs focused on the protection and celebration of San Diego's unique natural heritage. The destination has mechanisms in place to encourage cohabitation with resident wildlife and avoiding adverse impacts due to planned and/or unplanned interactions, as well as programs, and educational resources in place to promote safe, ethical cohabitation and interactions with wildlife for both residents and visitors.

San Diego tourism leaders have also demonstrated strong performance in the implementation of cultural heritage conservation. There are regulations and management plans in place, and numerous attractions, sites and experiences feature the unique cultural heritage of the region. A good example of this is found at Old Town State Park which features museums and historical sites to learn about early settlements and explore original 1800 year old structures. The SDTA and industry partners do an excellent job of celebrating San Diego's rich and diverse intangible heritage. The destination is well-positioned to continue to feature promotional campaigns focused on local storytelling about unique businesses, experiences, and events.

## Existing Attributes to Build Upon:

**Resources**
- BLM Land-Use Plans
- California Coastal National Monument Resource Management Plan
- California Dept of Fish and Wildlife Human-Wildlife Conflicts resources and toolkit
- California Land Management Plans
- California Master Plan for Marine Protected Areas
- California Private Lands Management Program
- Chronology of Indigenous Peoples in San Diego County
- City of San Diego Historic Preservation Planning
- City of San Diego Historical Resources Regulations and Guidelines
- Forest Service Land Management Plan
- ReWild Mission Bay Project
- San Diego Bay NWR Comprehensive Conservation Plan
- San Diego fishing and hunting regulations
- San Diego Management and Monitoring Program
- South Coast Resource Management Plan
- Visit San Diego History & Heritage Page
- Visitor and Resident Sentiment Surveys

**Stakeholders**
- Balboa Park Cultural Partnership
- Biodiverse SD
- California Native Plant Society
- Chicano Park Museum
- Cultural and natural heritage attractions, parks and recreation sites
- Cultural Festivals and Events
- Forever Balboa Park
- I Love A Clean San Diego
- La Jolla Playhouse
- Living Coast Discovery Center
- Old Town San Diego State Historic Park
- Port of San Diego Environmental Advisory Committee
- San Diego Audubon
- San Diego Black Historical Society and Museum
- San Diego Canyonlands
- San Diego Chinese Historical Museum
- San Diego Coastkeepers
- San Diego Commission for Arts and Culture
- San Diego Convention Center
- San Diego Museum Council
- San Diego National Wildlife Refuge
- San Diego River Park Foundation
- San Diego Symphony
- Save Our Heritage Organisation
- Sierra Club San Diego Chapter
- Surfrider Foundation

## Destination Diagnostic - Sustainable Destination Theme and Best Practices

| Theme 5 - Destination Infrastructure | Diagnostic Score (0-5) |
|---|---|
| Asset Inventory | 4 |
| Stewardship Fund | 4 |
| Visitor Behavior Guidelines | 3 |
| Interpretive Information | 3 |
| Theme Score | 0.70 |

**Purpose:** Providing sustainable management of community infrastructure to support resident quality of life and a positive visitor experience.

**Impact:** This standard is limited in scope in relation to the broad topic of infrastructure; the focus is primarily on the visitor experience and community assets such as trails, low impact transportation, and accessibility. Monitoring and measuring tourism impacts supports proactive planning to ensure that destination infrastructure serves the needs of the community and its residents and offers a quality visitor experience.

**Destination Diagnostic:** The importance of destination infrastructure that improves overall sustainability, can't be overstated, and the City of San Diego along with the County and State of California, places significant emphasis on sustainable transportation as a key priority. Various comprehensive plans, such as the Climate Action Plan, SANDAG Regional Plan, and Mobility Master Plan, underscore the commitment to sustainable practices. Despite a predominant reliance on cars among residents and visitors, considerable investments and initiatives are underway to promote and educate about alternative transportation modes including buses, trolleys, coasters, sprinters, Pacific Surfliner trains, and EV shuttles like the Beach Bug.

Additionally, there are considerable investments by the City of San Diego, San Diego County and industry stakeholders to improve accessibility of attractions, outdoor recreation spaces and public services. The SDTA meets basic best practice by providing an Accessibility Guide on the Visit San Diego website. An opportunity to advance current initiatives is to develop a full inventory of ADA accessible attractions, sites and experiences with specific accessibility descriptive information.

Enhancing the city's walkability and trail infrastructure also stands as a crucial objective for both tourism and community organizations. The downtown area, in particular, is witnessing increased investment in walking and biking infrastructure. Advocacy groups like the San Diego County Bicycle Coalition are championing the establishment of trail infrastructure throughout the city and within the canyons to foster better neighborhood connectivity and spur economic activity in less-visited communities. While the Visit San Diego website encourages car-free experiences, it is recommended destination leaders disseminate bike routes and self-guided walking experiences to fully activate the low impact transportation opportunities.

Finally, the region boasts numerous outdoor recreation stewardship groups and conservation organizations, including the San Diego Coastkeeper, Surfrider Foundation, San Diego Canyonlands, and the Audubon Society. The San Diego Department of Parks and Recreation collaborates with other key land managers such as California State Parks, National Park Service, Port of San Diego, and the Navy to oversee parks and open spaces, utilizing Transient Occupancy Tax revenue from the General Fund to maintain outdoor recreation assets. However, there is a need for more direct communication and engagement between land managers and destination leaders, which could further enhance sustainable tourism initiatives.

**Existing Attributes to Build Upon:**

**Resources**
- Better by Bike
- Blueprint SD and General Plan Amendment
- Car-free options promoted on Visit San Diego
- City of San Diego ADA Compliance and Accessibility
- Climate Action Plan
- Community Plans
- Community Parking Districts
- Experience San Diego Destination 2040 (first master plan)
- Mobility Evaluation Tool
- Mobility Master Plan
- Pacific Beach Shuttle " Beach Bug"
- SANDAG Regional Plan
- San Diego County EV Consumer Guide
- San Diego County EV Roadmap
- Scooters
- Visit San Diego Accessibility Guide

**Stakeholders**
- City of San Diego
- Downtown San Diego Partnership
- Friends of Rose Canyon
- Outdoor Outreach
- Port of San Diego
- San Diego Audubon Society
- San Diego Canyonlands
- San Diego Coastkeeper
- San Diego County Bicycle Coalition
- San Diego County Lodging Association
- San Diego Mountain Biking Association
- San Diego Regional Chamber of Commerce
- San Diego Regional EDC
- San Dieguito River Valley Conservancy
- SANDAG
- Surfrider Foundation
- San Diego Tourism Authority

## Destination Diagnostic - Sustainable Destination Theme and Best Practices

| Theme 6 - Marketing & Communications | Diagnostic Score (0-5) |
|---|---|
| Destination Marketing | 3 |
| Theme Score | 0.60 |

**Purpose:** Destination promotion and sharing community values with residents, businesses, and visitors.

**Impact:** Marketing and communications are important to grow tourism as well as to shape responsible visitor (and resident) behaviors through education and engagement. Destinations that craft promotional materials which are consistent, transparent, and considerate of all stakeholders are better positioned to mitigate potential conflicts and ensure positive impacts from tourism.

**Destination Diagnostic:** The Visit San Diego website, along with its social media campaigns and promotional assets, effectively communicate San Diego's narrative as a nature-based, culturally-rich destination. As the destination continues to prioritize destination stewardship, it is recommended SDTA continue to showcase San Diego's unique sustainability story. Potential messaging could include regenerative experiences, visitor education, and sustainable businesses. Many tourism businesses in San Diego are actively pursuing sustainable goals by improving operations and making significant investments to reduce their carbon footprint and preserve cultural and natural heritage. This presents an opportunity for SDTA to launch new promotional campaigns featuring sustainable businesses and establish recognition programs for high performers.

Numerous organizations already offer volunteer opportunities for both residents and visitors which can be packaged as "regenerative tourism" experiences. Existing volunteer opportunities available for regenerative visitor experiences can be found with the San Diego Zoo, Balboa Park, San Diego River Park Foundation, San Diego Audubon Society, San Diego Natural History Museum, and with the Parks and Recreation Department.

## Existing Attributes to Build Upon:

**Resources**
- Experience San Diego Destination 2040 (first master plan)
- San Diego Tourism Annual Report
- Visit San Diego website
- Tourism Matters San Diego (video)
- Visit San Diego visitor safety and responsibility information
- Visit San Diego social platforms: Facebook, Instagram, Tik Tok, Twitter (X), YouTube
- Visitor and Resident Sentiment Surveys

**Stakeholders**
- BLocal San Diego
- City of San Diego
- Downtown San Diego Partnership
- Port of San Diego
- Port of San Diego Green Business Network
- San Diego County Lodging Association
- San Diego Regional Chamber of Commerce
- San Diego Tourism Authority
- San Diego Tourism Marketing District
- San Diego Tourism Stewardship Plan Steering Committee

## Destination Diagnostic - Sustainable Destination Theme and Best Practices

| Theme 7 - Community Stewardship | Diagnostic Score (0-5) |
|---|---|
| Resident Sentiment | 3 |
| Community Participatory Planning | 4 |
| Sustainable Business Programs | 2 |
| Land Manager Engagment | 1 |
| Community Engagement Programs | 4 |
| Affordable Housing Programs | 4 |
| Training Opportunities | 3 |
| Localized Supply Chains | 3 |
| Theme Score | 0.60 |

**Purpose:** Fostering inclusion in decision-making and building equity and opportunities for all residents.

**Impact:** This theme aims to build trust and community collaboration around tourism growth and management. If community stakeholders are not given opportunities to be involved in determining the future of tourism, the long-term sustainability of the tourism industry is at risk.

**Destination Diagnostic:** The incorporation of tourism management efforts alongside traditional marketing functions is most clearly seen through community stewardship activities. San Diego is split on the performance of this theme with some practices showing good progress and others needing improvement. The SDTA and other destination leaders are actively enhancing community inclusion in participatory planning initiatives, exemplified by the establishment of the new role of Director of Diversity, Equity, Inclusion, and Community Engagement and resident sentiment surveys in recent years. The updated Tourism Stewardship Plan engages residents through surveys, interviews, focus groups, and workshops, while initiatives like Community Working Groups facilitate the implementation of the San Diego Climate Action Plan. It is recommended destination managers continue to foster and strengthen relationships with local businesses and land managers regarding stewardship and sustainability.

Although many tourism businesses and attractions engage in sustainability programs and strategic planning, there is currently no destination-wide tourism industry program offering resources, training, or learning opportunities to assist businesses in enhancing sustainability efforts. While groups like BLocal San Diego and the Port of San Diego Green Business Network provide support, the SDTA should examine ways to better leverage existing business sustainability programs and provide targeted resources to tourism entities.

Various agencies, including the City Department of Parks and Recreation, California Parks and Recreation, the County of San Diego, the National Park Service, the US Navy, and community groups, manage parks and open spaces in San Diego. Presently, when land management issues arise on city parks and recreation managed land, stakeholders inform the Mayor's office, and the Department of Parks and Recreation is notified. The City Department of Parks and Recreation collaborates with other land management entities when shared issues arise. To adopt a more proactive land management approach, particularly regarding visitor behaviors and experiences, it is recommended destination managers establish a more direct communication pathway with land managers to discuss issues related to visitor use and its impacts on public lands to effectively determine collaborative solutions.

A limited workforce, strained by high cost of living and limited affordable housing within the city of San Diego, are critical issues facing the local tourism industry. According to a recent tourism workforce study, "Turnover in tourism jobs is common. 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: 67% of survey respondents indicated that they are likely or extremely likely to leave their current job within the next year, but stay within the travel industry/sector." There are numerous organizations and educational institutions providing training and workforce support resources to improve worker retention and livelihood within the tourism industry. It is recommended the SDTA assess available training and support resources and work with partners to continue to address housing and cost of living challenges.

**Existing Attributes to Build Upon:**

**Resources**
- Blueprint SD and General Plan Amendment
- Reducing Wasted Food at the Hilton SD Bayfront
- City of San Diego Affordable Housing
- City of San Diego AgeWell Services
- Climate Action Plan
- Community Plans
- Environmentally Preferable Purchasing Program
- Farm Bureau San Diego County Buy Local
- Homes For All of Us' Ordinance into Law
- Local farmer's markets
- Mission Trail Region Park Guide Training
- Native Like Water
- Online "Buy Local" listing
- Outdoor Adventures Guide Training
- Resident Sentiment Surveys
- San Diego Foundation Economic Equity Report
- SD Mesa College Hospitality Management Program
- San Diego Professional Tour Guide Association Certification Training
- San Diego State University School of Hospitality & Tourism Management
- Visit San Diego Green Meeting Resources
- Youth Camps and Enrichment Program
- San Diego Zoo Alliance Youth Programs
- SAY San Diego (Social Advocates for Youth)
- Tourism Workforce Study
- University of San Diego School of Business Master of Science in Hospitality Management and a Professional Certificate in Meeting and Event Management
- Urban Corps of San Diego County

**Stakeholders**
- BLocal San Diego
- California State Parks
- California State University San Marcos
- City of San Diego
- County of San Diego
- Downtown San Diego Partnership
- Good Food Purchasing Program Working Group
- Meeting Professionals International San Diego Chapter
- National Park Service
- Port of San Diego
- Port of San Diego Green Business Network
- San Diego City College
- San Diego College of Continuing Education
- San Diego County Lodging Association
- The San Diego Made Factory
- San Diego Mesa College
- San Diego Professional Tour Guide Association
- San Diego Regional Chamber of Commerce
- San Diego Regional EDC
- San Diego State University
- San Diego Tourism Authority
- Director of Diversity, Equity & Inclusion and Community Engagement
- San Diego Tourism Marketing District
- San Diego Tourism Stewardship Plan Steering Committee
- SANDAG
- University of San Diego
- US Naval Base San Diego

## Destination Diagnostic - Sustainable Destination Theme and Best Practices

| Theme 8 - Community Resilience | Diagnostic Score (0-5) |
|---|---|
| Risk and Resilience Assessment | 5 |
| Climate Action | 3 |
| Emergency Response | 4 |
| Safety & Security | 4 |
| Public Health | 4 |
| Theme Score | 0.80 |

**Purpose:** Assessing hazards and risks, and planning for response and protection for all during disasters and emergencies.

**Impact:** The risks that destinations expect to encounter are traditionally managed through hazard mitigation plans that account for natural and environmental disasters. Within sustainable destination standards, risk is more specifically evaluated within the context of tourism's potentially negative impacts and challenges, which include climate change, socio-cultural considerations, housing, access to health care, workforce development, and other sustainability indicators that truly support resident quality of life and visitor safety.

**Destination Diagnostic:** The global pandemic underscored the necessity for emergency preparedness, and the tourism industry demonstrated resilience by playing a crucial role in communications during challenging times. Throughout the pandemic, the City of San Diego and SDTA provided visitors with clear and transparent information regarding safety and health concerns. The SDTA also equipped its members with a comprehensive Visit San Diego Member COVID-19 Toolkit, consisting of resources, advocacy efforts, financial assistance programs, research, marketing resources, webinars, training, and news updates. Additionally, during wildfires and floods, the SDTA, City, County, and other partners consistently communicated updates to both visitors and residents. These efforts should be seen as templates for crisis communications moving forward.

San Diego's risk and resilience assessments are notably advanced compared to other destinations. Tourism is integral to various risk assessments conducted by the city, such as the City of San Diego State Lands Sea Level Rise Vulnerability Assessment, and Climate Change Vulnerability Assessment. Several tourism assets are deemed "most vulnerable," including public safety facilities, water infrastructure, transportation systems, stormwater management, open spaces, environmental resources, and historical, tribal culture, and archaeological sites.

As a city, San Diego should be recognized as a leader in Climate Action, with the introduction of its updated Climate Action Plan in 2023. Led by the City Department of Sustainability and Mobility, the plan incorporates a unique Climate Equity Index to ensure equitable resource distribution for carbon emission reduction across all communities. However, the plan lacks inclusion of the tourism sector's potential role in achieving ambitious goals and participating in the mitigation of impacts to the industry. While some industry leaders, like the Port of San Diego, have developed their own Climate Action Plans, destination and tourism managers should consider a program tailored specifically to the tourism industry that is aligned with the city's plan, identify implementation areas, and accelerate actions within the industry.

**Existing Attributes to Build Upon:**

**Resources**
- Adaptation Clearing House
- Blueprint SD and General Plan Amendment
- Cal-Adapt
- California Adaptation Planning Guide
- California's Fourth Climate Change Assessment
- City of San Diego Coronavirus Information
- City of San Diego Flood Mitigation Plan and Grant Program
- City of San Diego State Lands Sea Level Rise Vulnerability Assessment
- Climate Action Plan
- Climate Change and Health Profile Report San Diego County
- Collaborative Planning for Climate Resilience
- Community Plans
- Food Inspectors 'Get Out There' to Keep You Safe (video)
- Local Hazard Mitigation Plan
- Multi-Jurisdictional Hazard Mitigation Plan
- Personal Wildland Fire Action Guide
- Port of San Diego Adopts Climate Action Plan
- Safeguarding California
- San Diego County Air Pollution Control District Incident Response Plan (Jan 2022)
- San Diego County Emergency Operations Plan
- San Diego Police Department Personal Safety and Security Tips
- San Diego Regional Report, Fourth Climate Change Assessment
- Sea Level Rise Adaptation Strategies in San Diego
- State of California Sea-Level Rise Guidance
- The Climate Change Vulnerability Assessment
- The Live Well San Diego Community Health Assessment
- Very High Fire Hazard Severity Zone Map
- Visit San Diego Member Covid-19 Toolkit

**Stakeholders**
- CERT San Diego
- City of San Diego
- Department of Sustainability and Mobility
- Department of Parks and Recreation
- County of San Diego
- Port of San Diego
- San Diego Climate Action Campaign
- San Diego Fire-Rescue Department
- San Diego Regional Climate Collaborative (SDRCC)
- San Diego Tourism Authority
- San Diego Tourism Stewardship Plan Steering Committee
- SANDAG
- The Health and Human Services Agency
- Tourism businesses and organizations
- Urban Search and Rescue
- US Naval Base San Diego

## Destination Diagnostic - Sustainable Destination Theme and Best Practices

| Theme 9 - Environmental Resources | Diagnostic Score (0-5) |
|---|---|
| Waste Management | 4 |
| Water Management | 4 |
| Water Quality | 4 |
| Wastewater Management | 4 |
| Energy Management | 4 |
| Emissions Management | 4 |
| Pollution Management | 4 |
| Theme Score | 0.80 |

**Purpose:** Sustainable management of energy, water, waste, and pollution prevention.

**Impact:** The environmental resources theme establishes, at a minimum, that the destination is managing foundational environmental resource systems well.

**Destination Diagnostic:** Drought, flooding, water quality, and climate change were noted as some of the most critical issues facing the destination.

San Diego demonstrates general compliance with the sustainable destination management standard concerning environmental resource management, yet continual improvement will always remain necessary. The city operates an effective waste management system, overseen by comprehensive city management, which encompasses the disposal of trash, recycling, and compost. Since 2015, San Diego has been implementing the San Diego Zero Waste Plan, aiming for 75% diversion by 2020, 90% by 2035, and zero waste by 2040. Businesses are actively encouraged to engage in Business Recycling Programs and Commercial Food Scraps Recycling. Additionally, San Diego has enacted a Single Use Plastic Reduction Ordinance, aimed at decreasing the usage and sale of polystyrene foam containers, plastic straws, and utensils.

Concerns persist regarding storm surges causing flooding, particularly in south county communities, disproportionately affected by cross-border sewage flows from Mexico and the Tijuana River Valley. To address water quality issues, the Department of Environmental Health and Quality administers the Beach and Bay Water Quality Monitoring Program, conducting beach water testing, public education, outreach, and necessary beach postings. The program coordinates sampling and signs at beaches impacted by sewage spills or elevated bacteria levels.

San Diego's Municipal Code incorporates noise, glare, and outdoor lighting regulations to manage noise and light pollution. The San Diego Audubon spearheads the "Lights Out, San Diego!" campaign to raise awareness about light pollution's impact on migratory birds and wildlife along the Pacific Flyway. The tourism industry holds a unique opportunity to advocate for businesses and organizations to pledge support for reducing light pollution.

It is recommended the SDTA and destination partners explore opportunities to monitor and report on tourism stakeholder efforts to effectively manage waste, water, and pollution. Through a deeper analysis of tourism's participation in these management efforts, tourism leaders can identify where there is insufficient participation and develop industry-specific resources and programs to increase efforts.

**Existing Attributes to Build Upon:**

**Resources**

• 2020 Urban Water Management Plan

Business Recycling Programs

Business Recycling Ordinance, Resources and Guidance

California Good Samaritan Food Donation Act

City of San Diego Recycling Ordinance Update

City of San Diego Waste Management Plan

City of San Diego Waste Management Regulation

City of San Diego Water Quality Reports

City of San Diego Zero Waste Plan

Climate Action Plan

Commercial Food Waste Recycling

Customer Access to Recycling and/or Organics Recycling Containers (AB 827)

Food Establishment Wastewater Disposal Program

Lights Out San Diego

Mandatory Commercial Organics Recycling

Mandatory Commercial Recycling

Municipal Energy

Municipal Energy Strategy and Implementation Plan

Pure Water San Diego

Public Power Feasibility Study

San Diego Air Pollution Control District

San Diego Basin Plan

San Diego Community Power

San Diego Municipal Code

San Diego Municipal Storm Water Permit

San Diego Single Use Plastic Reduction Ordinance

San Diego Water Quality Improvement Plans

SANDAG Regional Projects

Short Lived Climate Pollutants (SLCP): Organic Waste Reductions (SB 1383)

Single-Use Carryout Bag Ban (SB 270)

Single-Use Foodware Accessories and Standard Condiments (AB 1276)

Single-Use Plastic Straws (AB 1884)

Stargaze in San Diego - 7 Places to See the Stars

Waste Characterization Studies

**Stakeholders**

• Clean SD

• City of San Diego

• Downtown San Diego Partnership

• Ocean Monitoring Program (OMP)

• Port of San Diego

• Recycled Water

• Regional Water Quality Control Board (San Diego)

• San Diego Audubon Society

• San Diego Coastkeepers

• San Diego County Lodging Association

• San Diego Regional Chamber of Commerce

• San Diego Regional EDC

• San Diego Tourism Authority

• San Diego Tourism Marketing District

• San Diego Tourism Stewardship Plan Steering Committee

• SANDAG

• Water Conservation

# Best Practices Evaluation

To simplify the diagnostic findings above, the best practice matrix classifies the most notable best practices according to two indicators: performance and level of influence. Performance indicates the best practices which scored highest (4,5) and lowest (0,1), classifying them as either High Performance or Needs Improvement. Influence is defined by the level of decision making capability the tourism destination manager has for implementing the best practice (high influence) vs reliance on other destination and/or municipality managers (limited influence). The table describes each quadrant of the matrix.

## QUADRANT: Q1
### HIGH PERFORMANCE/HIGH INFLUENCE
The destination is performing at the highest levels on these best practices and activites, which the destination/tourism manager has significant responsibility for implementing, modifying, and managing

## QUADRANT: Q2
### HIGH PERFORMANCE/LIMITED INFLUENCE
The destination is performing at the highest levels on best practices that others outside of the tourism industry are managing (e.g., county and municipality managers, land managers)

## QUADRANT: Q3
### NEEDS IMPROVEMENT/HIGH INFLUENCE
The destination is underachieving on best practices and activities that the destination/tourism manager has the ability to improve

## QUADRANT: Q4
### NEEDS IMPROVEMENT/LIMITED INFLUENCE
The destination is underachieving on best practices and activities that others outside of the tourism industry are managing

|  | HIGH PERFORMANCE | IMPROVEMENT NEEDED |
|---|---|---|
| **HIGH INFLUENCE** | **QUADRANT: Q1**<br>Visitor and Economic Monitoring<br>Community Participatory Planning | **QUADRANT: Q3**<br>Destination Stewardship Council<br>Destination Stewardship Monitoring System<br>Visitor Management System |
| **LIMITED INFLUENCE** | **QUADRANT: Q2**<br>Long Range Comp Plan<br>Land Use, Environmental Impact, and Tourism Regulations<br>Risk and Resilience Assessment | **QUADRANT: Q4** |

# VOICE OF OUR COMMUNITY
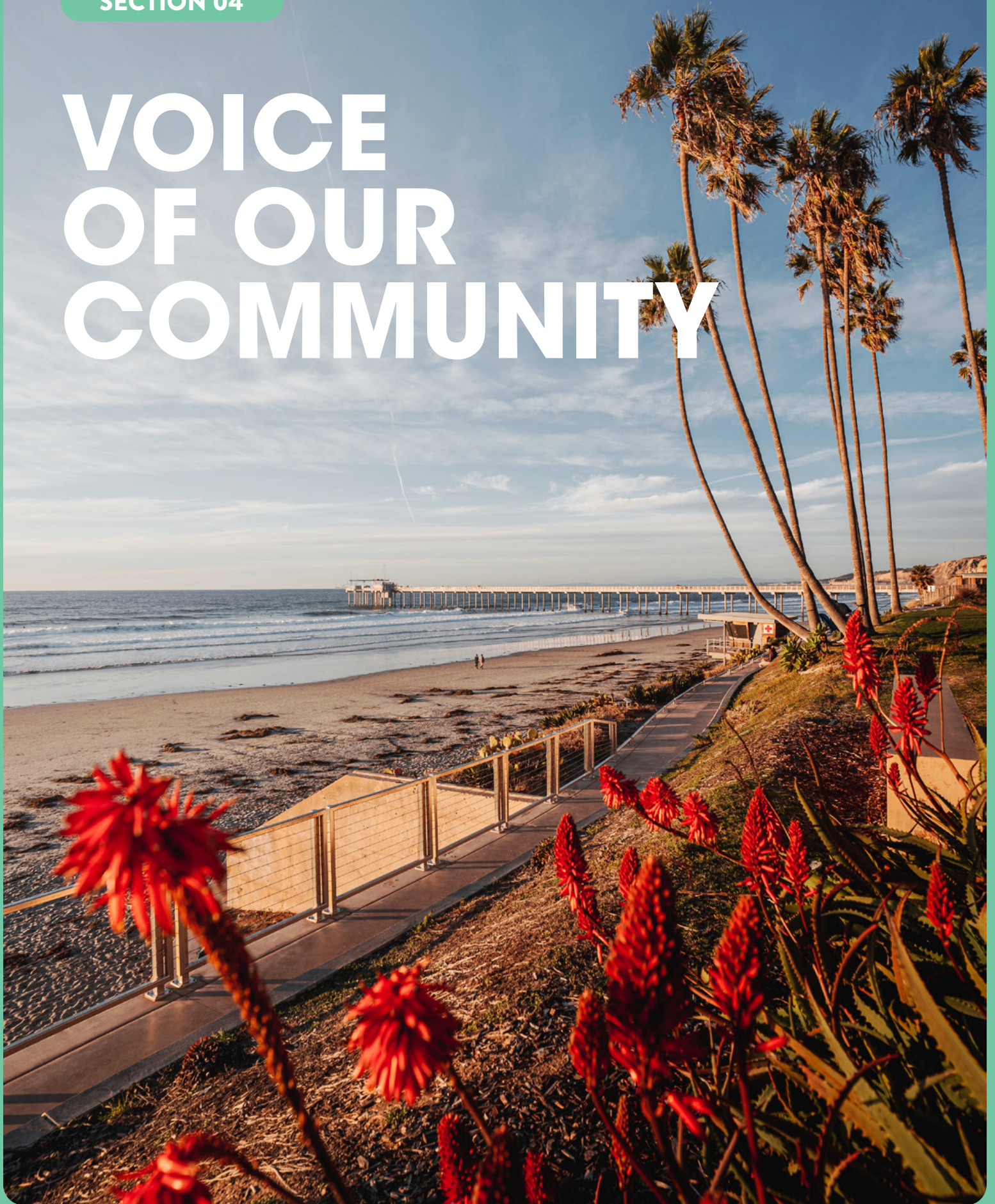
# COMMUNITY SURVEY RESULTS

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.

In Q1 2024, San Diego Tourism Authority distributed a community survey to provide local residents with the opportunity to be engaged in the planning process and share their perceptions on how San Diego is positioned as a destination to live and work, and to gauge residents' perceptions on a variety of key issues with respect to livability, culture, economy, and sense of place.

# Methodology

**Sample:** Total sample of 2,086 respondents

**Data Collection:** January 22 -February 29, 2024

**The key objectives of the community survey included:**

• **Assess the quality and satisfaction with transportation services and cultural amenities** throughout San Diego;

• **Identify local community aspirations, concerns and satisfaction** with the sustainability of tourism in the region;

• **Identify hidden assets** that may offer the potential to increase resident quality of life and sustainable tourism development.

# Current Perceptions

In the first section of the survey, we invited community respondents to share their current perceptions of San Diego - from key factors that led to their decisions to live/work/study in the City, to top places and things locals would recommend to first-time visitors, and their perceptions of the impacts of tourism.

Nearly 2 in 3 San Diegans (63%) say tourism positively impacts their life as a local.

**How Would You Say Tourism Impacts Your Life As A Resident?**



Extremely Negatively
0.9%

Somewhat Negatively
9.6%

Neither Positively Nor Negatively
26.2%

Extremely Positively
25.2%

Somewhat Positively
38.1%
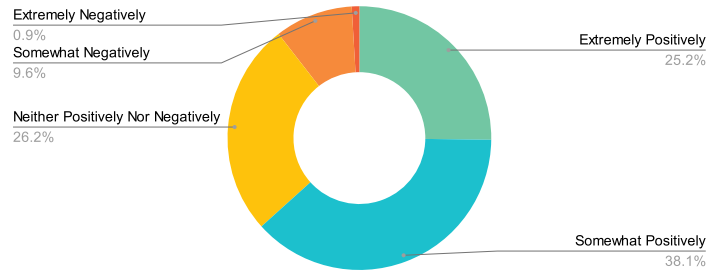
When asked about their perceptions of how tourism impacts their life as a resident, 25% of community respondents said 'Extremely Positively' and 38% said 'Somewhat Positively'. Only 10% of respondents indicated that tourism had any type of negative impact on their life.

## To What Extent Do You Agree With The Following Statements About Tourism In San Diego?

Legend: ■ Strongly Disagree ■ Disagree ■ Agree ■ Strongly Agree

| Statement | Agree | Strongly Agree |
|---|---|---|
| Being a popular travel destination, San Diego is home to diverse activities, attractions and entertainment from which | 27.37% | 64.25% |
| Tourism provides tax revenue that is essential to local governments | 28.69% | 59.28% |
| I feel proud to live in an area that is a popular travel destination | 31.07% | 56.12% |
| The tourism industry is a major source of jobs in the San Diego region | 34.22% | 52.61% |

X-axis: 0% 25% 50% 75% 100%

## How Important Do You Believe Tourism Is To San Diego's Economy?



Neutral 1.7%
Somewhat Important 16.2%
Very Important 80.7%
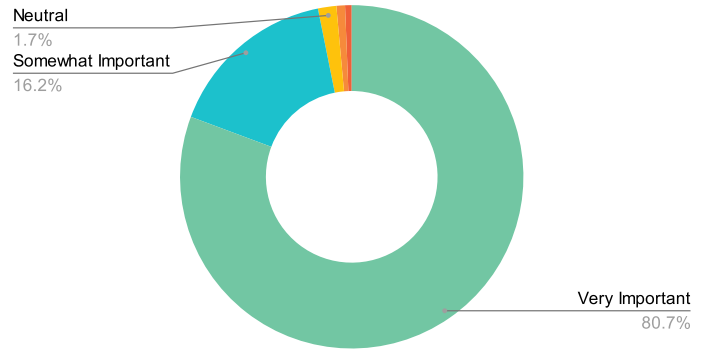
Nearly everyone believed in the importance of tourism to San Diego's economy - 96.9%. When asked to what extent locals agreed with the above statements about San Diego's position as a tourism destination, more than 8 in 10 residents agreed that tourism is a source of tax revenue essential to local government, creates a sense of local pride, and is a major source of jobs in the region. More than 9 in10 residents agreed that because San Diego is such a popular tourism destination it also is home to diverse activities, attractions & entertainment.

**Which Of The Following Words, If Any, Would You Use To Describe San Diego As A Destination?**

| Word | Percentage |
|------|-----------|
| Beautiful | 82.7% |
| Fun | 75.3% |
| Outdoorsy | 72.1% |
| Multi-cultural | 65.2% |
| Welcoming | 56.9% |
| Diverse | 53.3% |
| Vibrant | 47.5% |
| Historical | 46.1% |
| Chill | 42.3% |
| .. | |
| Progressive | 25.6% |
| Authentic | 24.9% |
| Clean | 21.7% |
| Innovative | 19.7% |
| Sustainable | 12.4% |
| Sophisticated | 11.9% |
| Business- | 11.6% |
| Gritty | 6.2% |
| Small | 5.4% |
| Boring | 1.5% |
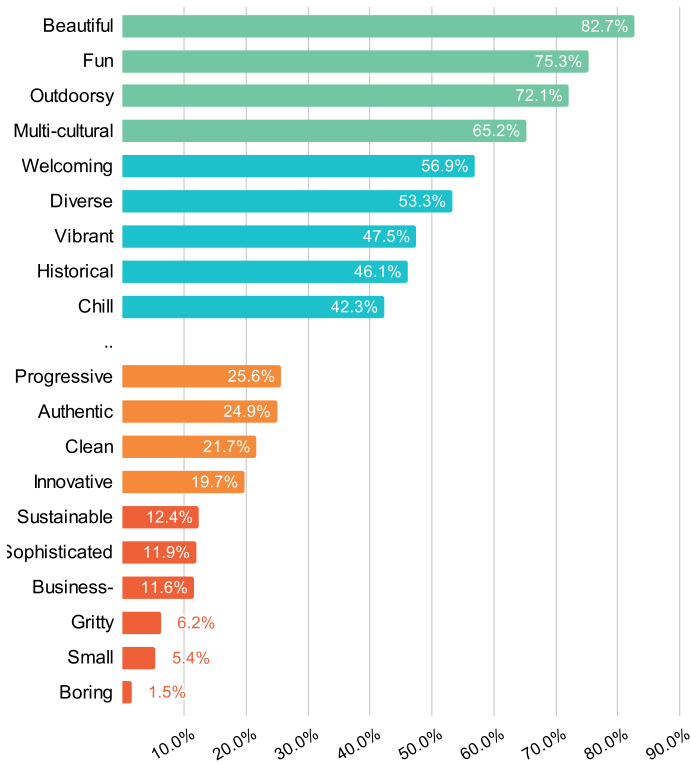
San Diegans proudly describe San Diego as a beautiful and fun outdoor destination balanced by diverse, historic and multi-cultural experiences.

Aligned with the destination's current brand positioning, locals described the destination as having a welcoming and chill vibe. Its scenic natural landscapes - from coast to desert - grounds the beauty of the destination and offers locals and visitors the opportunity to explore fun, outdoorsy adventures, including surfing, boat trips, mountain biking, and hikes.

Less commonly-used words to describe San Diego, however, included "authentic', 'clean', 'innovative', and 'sustainable'.

## The Local Aspiration & Areas for Improvement

In the second section of the survey, we invited community respondents to share their aspirations and vision for the destination and thoughts on areas of improvement to enhance quality of life in San Diego.

San Diegans generally rated the city's urban amenities highly. As such, there are significant qualities and factors that are opportunities to be capitalized on to enhance the visitors' experience too.

## Key Driver Analysis

The following key driver analysis determines what's important from the perspective of San Diegans, and their level of satisfaction. The chart plots both results in a traditional quadrant chart to visually represent areas of strength that should be maintained, opportunities to be capitalized upon, growth opportunities where performance should be evaluated, and lower priority areas that should be monitored but not focused on.

Similar to visitors, locals highly rated the importance of the city's climate, its natural environments, as well as access to dining/culinary experiences and outdoor activities in choosing San Diego as their destination. In addition, the arts and cultural offerings (museums/cultural institutions, events & festivals, concerts & shows), and diverse communities and neighborhoods in San Diego are also highly rated in quality, with weighted average scores of about 8.0+.

1. High Importance, Low Quality
KEY AREAS OF WEAKNESS

2. Low Importance, Low Quality
KEY AREAS OF WEAKNESS

3. Low Importance, High Quality
KEY AREAS OF STREGTH

4. High Importance, High Quality
KEY AREAS OF STRENGTH
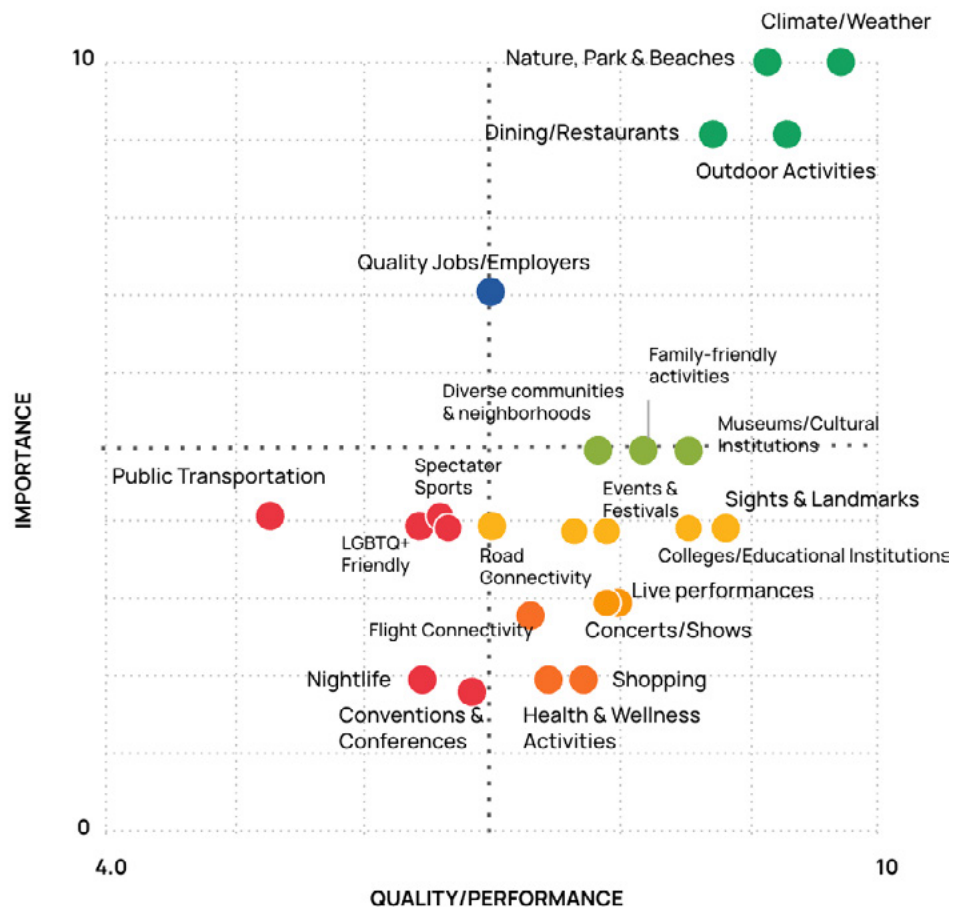
**My Aspiration For San Diego Is For It To Become A _____ Tourism Destination.**

| Category | Value |
|----------|-------|
| Clean/Safe | 179.00 |
| Affordable | 74.00 |
| Sustainable | 71.00 |
| Family-friendly | 45.00 |
| Welcoming | 34.00 |
| Diverse | 27.00 |
| Cultural | 25.00 |
| Eco | 18.00 |
| Accessible | 17.00 |
| Sports | 11.00 |

0.10
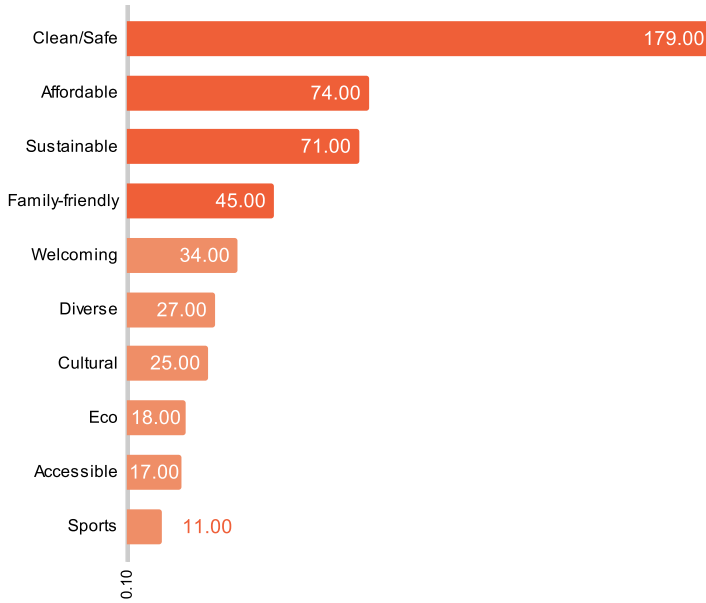
San Diegans have incredibly high hopes for the city as a top/ premier tourism destination.  In particular, the community indicated aspirations for San Diego to become a top destination in sustainability, and family-friendly, sports and cultural destinations.

# Respondent Profile

While the feedback provided through the community survey will greatly complement other research findings, it is important to acknowledge the potential biases offered by respondents based on income, age, race/ethnicity, and educational attainment factors.

## Income

Survey Respondents ■ City of San Diego



| | Survey Respondents | City of San Diego |
|---|---|---|
| Under $50,000 | 10.31% | 24.80% |
| $50,000-$74,999 | 11.67% | 13.10% |
| $75,000-$99,999 | 12.12% | 12.10% |
| $100,000-$149,999 | 22.66% | 19.60% |
| $150,000-$199,999 | 17.90% | 11.50% |
| $200,000+ | 25.33% | 19.00% |
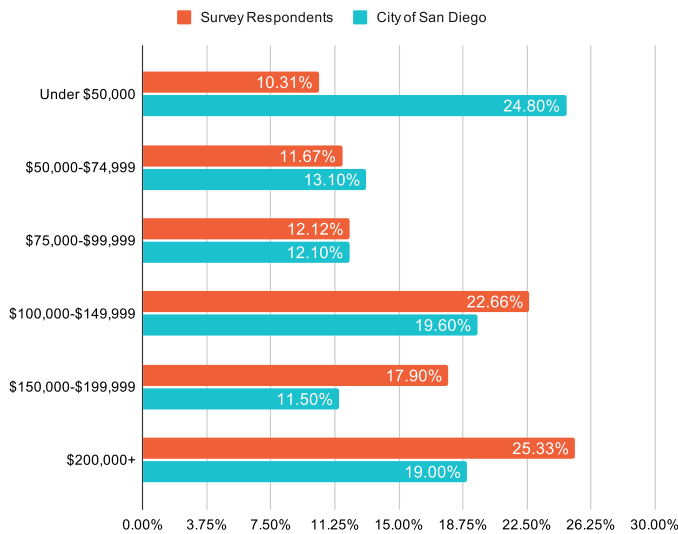
Respondents' reported household incomes were higher than that of the City's averages. In addition, respondents with household incomes under $50,000 are significantly underrepresented in the survey.

## Age

Survey Respondents ■ City of San Diego



| | Survey Respondents | City of San Diego |
|---|---|---|
| Under 18 | 0% | 18.25% |
| 18-24 | 3% | 11.39% |
| 25-34 | 10% | 18.62% |
| 35-44 | 16% | 14.63% |
| 45-54 | 18% | 11.70% |
| 55-64 | 24% | 11.02% |
| 65-74 | 20% | 7.98% |
| 75+ | 9% | 6.41% |
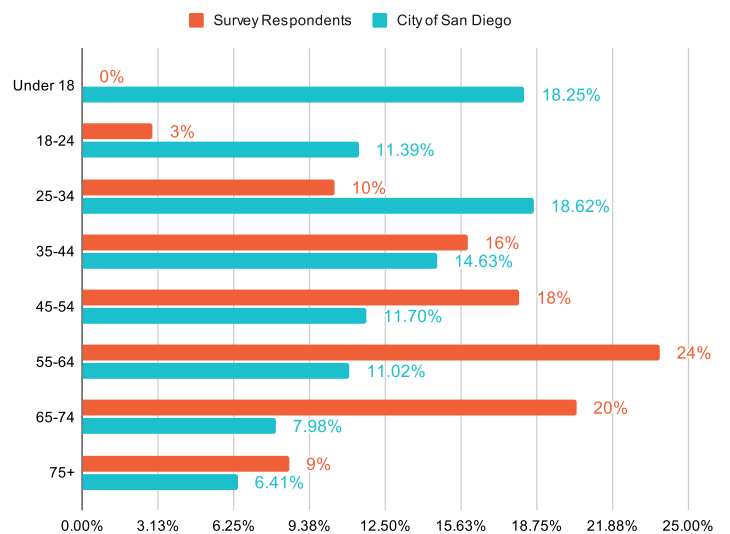
Respondents' reported ages were higher than the City's averages. As such, perspectives from locals aged 34 and below were underrepresented in the survey.

## Ethnicity

Survey Respondents ■ City of San Diego



| | Survey Respondents | City of San Diego |
|---|---|---|
| White | 78.13% | 41.90% |
| Black or African American | 3.22% | 5.50% |
| Hispanic or Latino | 13.00% | 29.00% |
| Asian or Asian American | 8.08% | 16.90% |
| American Indian or Alaska Native | 1.37% | 0.20% |
| Hawaiian or other Pacific Islander | 1.64% | 0.50% |
| All Other Races | 3.54% | 0.80% |
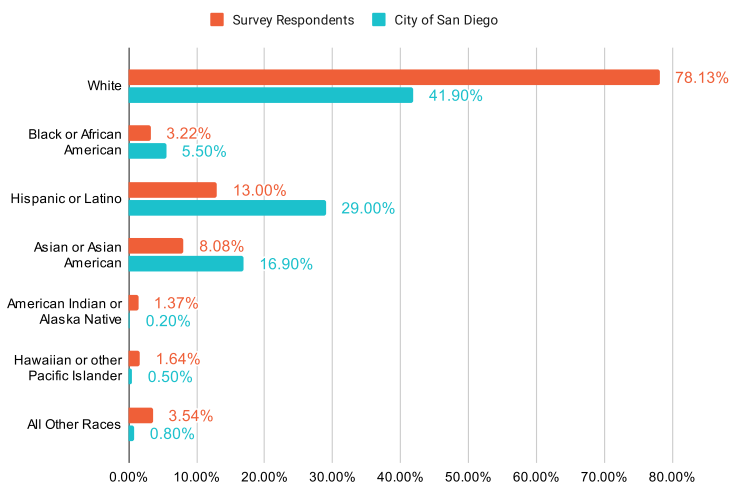
Respondents' reported race and ethnicity skewed White (Non-Hispanic) with over 78% respondents identifying as White. Meanwhile, the share of Hispanic, Black/African American, and Asian respondents are under-represented when compared with City averages

# THE FUTURE OF OUR DESTINATION

# INDUSTRY TRENDS IMPACTING SAN DIEGO

## The Rise Of Blended Trips

Modern business travelers' preferences are changing as they seek to combine business trips with leisure activities, often extending their stay for a weekend getaway. Several factors contribute to this rise, most notably the shift to more flexible work arrangements following COVID-19 have encouraged extended stays in destinations and blurred the lines between work and leisure. These blended trips offer an opportunity to combine professional obligations with leisure, to support a better work-life balance more conveniently.

An additional contributor to the rise of blended trips, is the shift in traditional forms of tourism, such as sightseeing or beach vacations are being supplemented with other activities to create more diverse and enriching travel experiences. This type of comprehensive trip is becoming more of a priority to travelers in choosing their destinations and itineraries.

This rise in blended trips reflects evolving consumer preferences and the desire for more meaningful and travel experiences that encompass a diverse range of activities and interests. This trend is likely to continue as travelers seek to maximize their enjoyment of work trips.

## Reduced Business Travel

The landscape of business travel has undergone a significant transformation over the last five years. This shift can be attributed to several factors, most obviously, a widespread adoption of remote work practices as a response to COVID19. With the rise of virtual communication tools and digital platforms, many organizations have reevaluated the necessity of in-person meetings and conferences, opting for virtual alternatives.

Yet in-person meetings are not an entirely lost practice as hybrid meetings have become more popular over the past year due to the same video conferencing that supported the pandemic. While stakeholders across the industry are concerned about the impact on face-to-face business events, event decision-makers also see the potential to increase audience engagement, drive membership and diversify revenue streams incrementally. In the end, the customer will validate (or not) the rise of omnichannel business events.

In addition to the rise of remote work, a heightened awareness of sustainability and cost-efficiency considerations has prompted companies to explore green, clean and more economical approaches to conducting business, often favoring a virtual meeting over air travel.

Consequently, frequent business travel has evolved, giving rise to a more streamlined and sustainable approach that prioritizes efficiency, flexibility, and environmental responsibility in the corporate realm.

## Sports Tourism

Sports tourism is one of the fastest-growing sectors in tourism, with an estimated growth rate of 17.5% between 2023 and 2030 (Skift). Sports tourism is an attractive asset for domestic and international travelers alike. Visitors are seeking out sport-related activities from events to actively participating during their travels, whether it is the primary purpose of their trip or a separate part of their itinerary.

Sporting events have varying scales, but global spectacles such as the Olympics, World Cup and F1 races, draw participants and spectators to the destination promoting significant tourism opportunities. Host destinations have the opportunity to leverage these events to update their destination branding, event infrastructure, and additional economic development touchpoints. Ultimately these updates should highlight the local culture and authenticity to differentiate their destination and further stimulate tourism after the event ends.

San Diego has the opportunity to continue to grow as a sports enthusiast's haven with an array of professional sports leagues and

events, and most notably with the new Major League Soccer team set to debut in 2025 in the Snapdragon Stadium. Highlighting its sports scene, San Diego can attract diverse travelers, drive economic growth, and promote destination development.

## Rise Of Domestic Travel

While COVID impacted the way businesses travel, it also impacted leisure travel. In response to growing uncertainties overseas and restrictions on international travel at the height of the pandemic, travelers have increasingly turned their attention to exploring within their own territories. This shift in travel behavior reflects a combination of factors including increasing demand for travel, lingering concerns about venturing far from home, and a desire for safe and accessible travel options. San Diego is set up to accommodate the rise of domestic flyers with its additional nonstop service options through Alaska Airlines and Breeze Airway to Atlanta, Cincinnati, Jacksonville, Norfolk and Pittsburgh.

Apart from air travel, there has been a notable rise in interest in drive-to destination and road-trip itineraries that allow travelers to delve deeper into regional, provincial, and national attractions. While domestic travelers are not always the biggest spenders, they have the potential to become long-term loyalists and ambassadors and could be enticed to places that visitors from afar wouldn't consider. Domestic travelers can renew sentiments of pride in the United States and could fuel enthusiastic domestic travel.

# We have the opportunity to leverage the growth in domestic audiences and extended business travel.

"We could be better known as a destination for digital nomads and extended travelers staying 2-4 months because of our year-round good climate."

"The digital nomads are already choosing San Diego for our year-round good climate so we should leverage them by making it easier to experience the real San Diego."

"Our event attracts domestic audiences from Boston, NY/NJ/CT, the NC Research Triangle, Bay Area, and to some extent Seattle."

"We are missing the young city traveler from LA or SF who is well-versed in city experiences and culture."

"Our airport will have 10 new net destinations since 2019, including non-stop flights to Atlanta, Alaska, Sacramento, Columbus and Pittsburgh."

"Global geo-political & economic events continue to greatly impact international travel."

## Living Like A Local

Visitors are now seeking more authentic experiences to deeply immerse themselves in that differ from conventional tourism activities. Visitors are looking to better understand the destination they are visiting through meaningful opportunities to interact with locals whether through cultural exchanges, participating in community events or culinary opportunities.

Modern travelers are focused on genuine and authentic experiences that are not over-commercialized, and living like a local provides the opportunity to engage with local customs and traditions in an actual way. The fixation on avoiding overly commercialized activities stems from the desire for more sustainable and responsible tourism practices. By living like a local, these goals are met by supporting local communities and by reducing the negative impact overtourism has on the environment.

San Diego supports these desires through its ethnic neighborhoods that reflect the multicultural fabric of its community. From Barrio Logan, a historically Mexican-American neighborhood, and especially Chicano Park, the colorful murals reflect the area's unique heritage to Kearny Mesa, a hub for Asian cuisine, shopping centers, and cultural institutions, these neighborhoods offer unique cultural experiences, culinary exploration and opportunities to learn about the diverse communities that exist within San Diego.

## Culinary Tourism

Over the last decade, there has been a particular increase in culinary tourism activities. In 2023 culinary tourism was $805.9 billion industry - which is expected to keep growing as travelers are increasingly viewing food as an integral part of their overall travel experiences. With the rise of social media, food-dedicated websites, and food-centric television programs, diverse culinary experiences have garnered a growing appreciation.

Additionally, as the desire for authentic and immersive travel experiences increases, food tourism has become a unique way to engage with a destination's heritage, traditions and way of life.

San Diego has addressed these interests by organizing local-specific culinary events in Little Italy, Barrio Logan, and Kerany Mesa and food festivals like San Diego Bay Wine + Food, San Diego Taco Fest and Latin Food Festival to draw visitors and showcase their culinary differentiators, culinary tourism packages which can include guided food tours, cooking classes and exclusive dining experiences and generally placing a premium on using locally sourced ingredients and traditional cooking techniques.

Culinary tourism is experiencing a surge in popularity as travelers crave meaningful, memorable and immersive experiences. Developing a culinary tourism infrastructure and leveraging a destination's food culture is a critical tool for a destination's visitor growth as it provides significant economic opportunities for the destination.

# VISITOR OF THE FUTURE

## The Discerning Urban Traveler

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 cultural and urban assets to target Discerning Urban Travelers, regardless of origin-market.



"The visitor of the future in San Diego will seek a blend of luxury, culture, and sustainability in their travel experiences. This traveler is likely to be well-informed, seeking authentic and unique experiences that go beyond traditional tourist attractions.

They might be interested in exploring San Diego's rich cultural scene, including its museums, galleries, and performing arts venues, as well as its diverse culinary offerings. They might also be drawn to the city's vibrant nightlife and entertainment options, seeking out hidden gems and local hotspots.

Sustainability and environmental consciousness are likely to be important factors for these travelers, who may prefer accommodations, transportation, and experiences that prioritize eco-friendly practices. They might be interested in activities that allow them to connect with nature and support local conservation efforts.

Overall, the visitor of the future in San Diego is likely to be a discerning traveler who values authentic experiences, cultural immersion, and sustainability, seeking to explore the city's urban offerings while also appreciating its natural beauty and commitment to conservation."

# CONCLUSION

# TOP TAKEAWAYS

The preceding destination performance assessment has shown a wide range of strengths, opportunities, and challenges facing San Diego as a visitor destination. As we begin to shape new products and experiences, and key developments, in response to market conditions, here are key highlights and takeaways that will guide the forthcoming strategies in the tourism stewardship plan:

**1. 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%).

**2. Tourism jobs may be diverse, however, the industry continues to face high turnover rates 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 as being 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.

**3. There are significant infrastructure projects planned and underway that demonstrate San Diego's commitment to sustainability and enhancing connectivity to the destination, and within the destination.** In particular, 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.

**4. San Diego's offering of outdoor activities 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.

**5. San Diego has a rich network of world-class museums, however, its cultural experience gap remains in performances and concerts.** From the influences of the Chicano, Mexicano, Latino and Indigenous arts and culture, to newer Asian immigrant communities, the destination has an opportunity to shine a light on local cultures through performative arts and events throughout the city to showcase more diverse forms of music, dance, film, and theater, and attract more visitors throughout the year.

**6. San Diego City properties have resumed the typical seasonality patterns that feature peak occupancies in the summer, however, there remains an opportunity to grow demand for hotels in shoulder months.** Occupancy in the months of May, and Nov-Jan are lagging and could be supported with specific investment in festivals and events during this time to activate the destination during off-peak season.

**7. Although the number of available hotel rooms has shrunk in the last few years and growth is likely to remain muted, there has been significant growth in the short-term rental supply since 2015.** 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.

**8. While the expansion of the San Diego Convention Center (SDCC) is not likely to happen in the near future, the convention center is very competitive and offers one of the best packages** in terms of adjacent hotel rooms and activities and experiences 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.

**9. San Diego is a sustainable destination and a great opportunity exists 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.

**10. San Diego is well suited to cater to the discerning urban traveler** who values authentic experiences, cultural immersion, and sustainability, seeking to explore the city's urban offerings while also appreciating its natural beauty and commitment to conservation.

# PRIORITY AREAS OF EXPERIENCE DEVELOPMENT

For the destination to better meet the needs of discerning urban visitors and blended travelers, San Diego will need to develop and enhance products and experiences, as well as infrastructure, in several categories, including:

**CULINARY & CULTURE**

**DESTINATION GOVERNANCE & MANAGEMENT**

**OUTDOOR RECRATION & ADVENTURE**

**SPORTS, MEETINGS & ENTERTAINMENT**

**BUSINESS & WORKFORCE DEVELOPMENT**

**MOBILITY**

A range of policies, programs, and development concepts will be further explored in the next phase of work, and refined as final strategies in the Tourism Stewardship Plan.

# APPENDIX

# Mountainideal

In 2013, the Global Sustainable Tourism Council (GSTC) developed the GSTC Criteria for Destinations (GSTC-D) which is seen as the universally accepted definition of sustainable destination management best practices. Any organization, community, or national authority can use the GSTC-D to develop a set of sustainable tourism guidelines for their unique situation. Where a new or sector-specific standard is fully equivalent to the GSTC standard, the new standard is awarded formal designation as "GSTC-Recognized". There are currently 11 GSTC-Recognized standards for destination management, including the Mountain IDEAL Standard.

The Mountain IDEAL standard has undergone a rigorous review process to be seen as fully equivalent to the GSTC-D and has received formal approval as a GSTC-Recognized standard, first in 2017 and again in 2021. This is the highest accolade for a sustainable destination standard. The Mountain IDEAL Program is a destination stewardship toolkit specifically designed for resort, rural, recreation, and gateway communities. The Mountain IDEAL program utilizes the GSTC-D principles as the foundation, then defines how outdoor communities can implement those best practices.

The Mountain IDEAL standard has been used for certification in Vail and Breckenridge, Colorado. It has also been adopted by over a dozen destinations as an assessment and planning tool.

The table below provides the general description of each best practice in the Mountain IDEAL standard, and the corresponding UN Sustainable Development Goals they address.

| Best Practice | General Description | SDGs |
|---|---|---|
| **Destination Stewardship Council** | The destination has an active, multi-stakeholder Destination Stewardship Council that includes representation from public and private sector, NGOs, and local residents who represent the cross-section of the destination. Their role is to holistically manage destination priorities and tourism's impact on socioeconomic, cultural, environmental, and natural resource issues. | 16 PEACE, JUSTICE AND STRONG INSTITUTIONS · 17 PARTNERSHIPS FOR THE GOALS |
| **Destination Management Plan** | The destination has an up-to-date multi-year destination management strategy and action plan to guide planning, development, and management of tourism and outdoor recreation activities and assets. | 17 PARTNERSHIPS FOR THE GOALS |
| **Economic Impact Monitoring** | The destination regularly measures and monitors tourism's economic contribution to understand and evaluate its impact on the local and regional economy and its residents. | 1 NO POVERTY · 8 DECENT WORK AND ECONOMIC GROWTH · 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE |
| **Visitor Volume Monitoring** | The destination periodically and consistently measures and monitors visitor volumes, characteristics and demographics to understand trends and evaluate their impact on its economy, visitor experience, and resident quality of life. | 12 RESPONSIBLE CONSUMPTION AND PRODUCTION |
| **Visitor Satisfaction Monitoring** | The destination and major employers regularly measure and monitor visitor satisfaction as a means to evaluate the quality and sustainability of the destination experience. | 11 SUSTAINABLE CITIES AND COMMUNITIES · 12 RESPONSIBLE CONSUMPTION AND PRODUCTION |
| **Destination Stewardship Monitoring** | The destination has a coordinated system to monitor, evaluate, publicly report and respond to socioeconomic, cultural, recreational, environmental, and natural resource impacts arising from tourism. | 11 SUSTAINABLE CITIES AND COMMUNITIES · 12 RESPONSIBLE CONSUMPTION AND PRODUCTION |
| **Long Range Comprehensive Plan** | The destination has a comprehensive plan and zoning guidelines that provide a framework and guidance to promote sustainable development. The plan is updated periodically and integrates stakeholder consultation. The plan or related plans and programs considers housing and infrastructure to support resident quality of life and visitor experiences (e.g., transportation, recreational paths, etc.). | 17 PARTNERSHIPS FOR THE GOALS |
| **Land Use Regulations** | The destination has land use planning, zoning and/or development laws, regulations, guidelines and/or policies that specify the location and nature of development, and require environmental, economic, and socio-cultural impact assessments. | 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE · 11 SUSTAINABLE CITIES AND COMMUNITIES |

| Best Practice | General Description | SDGs |
|---|---|---|
| **Tourism Development Regulations** | The destination has laws, regulations, guidelines, and/or programs and policies that specify the location and nature of tourism development, activities and operations, including (but not limited to) transportation, hotels and accommodations, and attractions. Development considers the visitor experience and quality of life for residents. Processes include resident stakeholder engagement. | 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE · 11 SUSTAINABLE CITIES AND COMMUNITIES |
| **Environmental Impact Regulations** | The destination has a current regulatory framework in place to minimize and mitigate adverse environmental impacts to human health and natural resources. | 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE · 11 SUSTAINABLE CITIES AND COMMUNITIES · 14 LIFE BELOW WATER · 15 LIFE ON LAND |
| **Human Rights** | The destination has laws, regulations, codes of conduct, and/or systems in place to uphold international standards of human rights, including preventing, monitoring, responding to, and reporting human trafficking, modern slavery, sexual and commercial exploitation of any kind, particularly of children, adolescents, women, LGBTQ, and other minorities. | 3 GOOD HEALTH AND WELL-BEING · 10 REDUCED INEQUALITIES · 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |
| **Equity for All** | The destination takes the necessary steps to ensure access for all including tourism, outdoor recreation, and community planning groups that are representative of the diversity of the community and that all demographics, ethnicities, and minorities. | 3 GOOD HEALTH AND WELL-BEING · 10 REDUCED INEQUALITIES |
| **Communal Property Rights** | The destination has laws or regulations that monitor, control, manage, report, protect, and enforce property rights and acquisitions, including use and access rights to key resources. They do not authorize resettlement without free, prior, and informed consent, and fair and just compensation. Laws or regulations are up to date and comply with relevant indigenous rights, customs, and communal property laws where applicable. | 11 SUSTAINABLE CITIES AND COMMUNITIES · 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |
| **Asset Inventory** | The destination has an up-to-date inventory of its key tourism assets and attractions to help inform and prioritize destination and visitor management strategies. The inventory considers natural, cultural and/or historic assets, attractions, or sites that constitute the primary tourism and outdoor recreational offerings of the destination. | 11 SUSTAINABLE CITIES AND COMMUNITIES · 12 RESPONSIBLE CONSUMPTION AND PRODUCTION |
| **Stewardship Fund** | The destination and major employers have a fund, program, initiative, and/or campaign through which visitors, businesses, and the public can contribute to sustainability, destination stewardship, and/or community development initiatives. | 11 SUSTAINABLE CITIES AND COMMUNITIES · 17 PARTNERSHIPS FOR THE GOALS |

| Best Practice | General Description | SDGs |
|---|---|---|
| **Visitor Management System** | The destination in collaboration with destination marketing organizations, tourism stakeholders and land managers has established a visitor and tourism management plan and system to minimize adverse impacts on key assets and attractions and ensure the sustainable use of natural and cultural sites. The system/management plan was developed with input from destination stakeholders and institutions, and is periodically reviewed and updated as necessary. | 11 SUSTAINABLE CITIES AND COMMUNITIES, 12 RESPONSIBLE CONSUMPTION AND PRODUCTION, 17 PARTNERSHIPS FOR THE GOALS |
| **Visitor Behavior Guidelines** | The destination has site behavior guidelines in place at key assets and attractions to minimize adverse impacts and ensure the sustainable use of recreational, natural and cultural sites. Guidance on visitor and resident code of conduct extends to guides and tour operators. | 11 SUSTAINABLE CITIES AND COMMUNITIES, 12 RESPONSIBLE CONSUMPTION AND PRODUCTION |
| **Interpretive Information** | The destination has interpretive information in place at key assets and attractions to inform residents and visitors of the natural and cultural significance of the sites they visit. The destination ensures that interpretive information detailing the natural, cultural, historical, archaeological, religious, or spiritual significance of key sites and attractions is provided/available to visitors and is culturally appropriate and offered in formats and languages relevant to residents and visitors. | 4 QUALITY EDUCATION, 11 SUSTAINABLE CITIES AND COMMUNITIES, 12 RESPONSIBLE CONSUMPTION AND PRODUCTION |
| **Tourism Carrying Capacity** | The destination has estimated the physical, social, and/or ecological carrying capacity of key sites within the destination to inform sustainable visitor use management strategies. The destination strives to prevent and mitigate impacts from overcrowding and overuse. Commitments include efforts to build a year-round tourism economy as appropriate to support the quality of life for residents and the local economy. | 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE, 11 SUSTAINABLE CITIES AND COMMUNITIES |
| **Natural Heritage Conservation** | The destination has policies and systems in place to measure, monitor, manage, and respond to impacts on the natural environment resulting from tourism. These include mechanisms or measures to conserve or rehabilitate sensitive sites and ecosystems, and to protect vulnerable habitats and species. | 14 LIFE BELOW WATER, 15 LIFE ON LAND |

| Best Practice | General Description | SDGs |
|---|---|---|
| **Species and Habitat Protections** | The destination has mechanisms in place to promote the welfare of animals in tourism, cohabitation with wildlife, and the conservation of resident flora, fauna, and all living organisms from exploitation. The destination is located within a country that is a signatory to the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITIES). | 14 LIFE BELOW WATER · 15 LIFE ON LAND |
| **Wildlife Interactions** | The destination has a system to ensure compliance with local, national, and international laws and standards for wildlife interactions. The destination provides relevant education to residents and to businesses with resources or support to train staff in wildlife tourism best practices and communicate applicable regulations and guidelines to their visitors. | 14 LIFE BELOW WATER · 15 LIFE ON LAND |
| **Intangible Heritage Celebration** | The destination offers programs, events, and/or experiences that celebrate or feature representations or expressions of its unique past and contemporary intangible cultural heritage and traditions, such as art, music, language, gastronomy, and other aspects of local identity and distinctiveness. This includes education, training and interpretative programming. The destination and applicable groups offering these opportunities are sensitive and respectful to the representative culture, involve and benefit local communities, and provide an authentic, genuine experience. | 11 SUSTAINABLE CITIES AND COMMUNITIES · 12 RESPONSIBLE CONSUMPTION AND PRODUCTION |
| **Cultural Heritage Conservation** | The destination has policies and systems in place to evaluate, manage, and respond to impacts on cultural heritage sites and landscapes resulting from tourism. These include mechanisms or measures for the conservation and/or rehabilitation of sensitive sites, as well as the responsible promotion and interpretation of cultural assets to include proper acquisition and sales of historical and archaeological artifacts. | 11 SUSTAINABLE CITIES AND COMMUNITIES · 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |
| **Heritage Site Access** | The destination has laws or regulations that monitor, control, manage, report, protect, and enforce property rights and acquisitions, including use and access rights to key resources for residents as well as visitors. They do not authorize resettlement without free, prior, and informed consent, and fair and just compensation. Laws or regulations are up to date and comply with relevant indigenous rights, customs, and communal property laws where applicable. | 11 SUSTAINABLE CITIES AND COMMUNITIES · 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |
| **Equitable Access for All** | The destination strives to ensure that sites, facilities, and services are accessible to all, including to persons with disabilities or other special needs. | 10 REDUCED INEQUALITIES · 11 SUSTAINABLE CITIES AND COMMUNITIES |

| Best Practice | General Description | SDGs |
|---|---|---|
| **Sustainable Transportation** | The destination has mechanisms or programs to reduce transportation emissions from travel to and within the destination through sustainable transportation options. To include, but not limited to low-emissions vehicles and public transportation, and active travel (e.g. walking and cycling) through fuel efficient or electric fleet vehicles and programs like bikeshares, electric charging stations, or incentive programs encouraging foot powered travel to better address congestion, air pollution, and climate change. | 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE / 13 CLIMATE ACTION |
| **Walkability and Trail Infrastructure** | The destination encourages active travel by designing corridors to safely walk and bike throughout the destination. | 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE / 11 SUSTAINABLE CITIES AND COMMUNITIES |
| **Recreation Resource Stewardship** | The destination collaborates and coordinates with local outdoor recreation stewardship groups, land managers, conservation organizations, and resource users to conduct maintenance and enhancement work on outdoor recreation resources such as trails and bike parks. Efforts include resident engagement and a dynamic outreach program. | 11 SUSTAINABLE CITIES AND COMMUNITIES / 14 LIFE BELOW WATER / 15 LIFE ON LAND |
| **Destination Marketing** | The destination ensures marketing and promotional campaigns aim to maximize the positive impacts of tourism. Communications include guidance on resident and visitor codes of conduct and the importance of treating local communities, and natural and cultural heritage, with respect. | 11 SUSTAINABLE CITIES AND COMMUNITIES / 12 RESPONSIBLE CONSUMPTION AND PRODUCTION |
| **Resident Sentiment** | The destination has a mechanism in place to collect residents' feedback and satisfaction levels with tourism's planning, development, management, sustainability, and impacts. Feedback is collected periodically and there are resources in place to respond to feedback. | 11 SUSTAINABLE CITIES AND COMMUNITIES / 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |
| **Community Participatory Planning** | The destination engages the community to promote public participation in tourism planning, development, and management, and ensure representation of diverse stakeholders in decision-making. The destination has programs or initiatives to enhance the public's understanding of sustainable tourism and its role in the community. | 11 SUSTAINABLE CITIES AND COMMUNITIES / 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |

| Best Practice | General Description | SDGs |
|---|---|---|
| **Sustainable Business Programs** | The destination or a destination authority/agent engages with tourism-related businesses to encourage and support the implementation of sustainability best practices that align with destination objectives and priorities. This includes educational and where possible recognition programs. | 11 SUSTAINABLE CITIES AND COMMUNITIES, 12 RESPONSIBLE CONSUMPTION AND PRODUCTION, 13 CLIMATE ACTION |
| **Land Manager Engagement** | Destination management includes collaboration with public land managers to address issues around resident and visitor use and associated impacts on public lands within the destination scope. | 11 SUSTAINABLE CITIES AND COMMUNITIES, 14 LIFE BELOW WATER, 15 LIFE ON LAND |
| **Community Engagement Programs** | The destination has programs to support community development through engagement with underrepresented communities, youth, older adults, and part-time and full-time residents. This extends to workforce development, community resource needs identification, and ensuring access to community infrastructure (e.g., health and human services, recreation, and educational resources). | 11 SUSTAINABLE CITIES AND COMMUNITIES, 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |
| **Affordable Housing Programs** | Affordable Housing Programs 3.9(GSTC Optional, MIS Required) The destination has taken measures to expand affordable housing options for year round residents and local workforce.3.9aThe destination has laws, regulations, and/or policies in place that require, encourage, and/or incentivize the development of affordable housing.3.9bThe destination has organizations, programs, and/or initiatives that help working families identify and access affordable housing opportunities within the community. | 1 NO POVERTY, 3 GOOD HEALTH AND WELL-BEING |
| **Training Opportunities** | The destination has laws, regulations, policies, standards, programs, and/or initiatives in place that require, support or encourage local businesses to prioritize hiring of local residents and pay a fair, living wage. The destination encourages or supports tourism businesses to commit to and execute on improvements to the diversity, equity, and inclusion of their workplaces. | 4 QUALITY EDUCATION, 5 GENDER EQUALITY, 8 DECENT WORK AND ECONOMIC GROWTH, 10 REDUCED INEQUALITIES |
| **Localized Supply Chains** | The destination provides resources, or has programs or initiatives in place, that encourage or support tourism businesses to purchase goods and services from local producers, to purchase sustainable/fairtrade products, or that otherwise support sustainable investment and enhance local and regional supply chains. The destination supports dedicated spaces or facilities for featuring or displaying local products, artisans, or entrepreneurs, such as food & beverages, crafts, and agricultural products, etc. | 11 SUSTAINABLE CITIES AND COMMUNITIES, 12 RESPONSIBLE CONSUMPTION AND PRODUCTION, 13 CLIMATE ACTION |

| Best Practice | General Description | SDGs |
|---|---|---|
| **Risk and Resilience Assessment** | The destination has undertaken a risk assessment to understand its vulnerabilities and build resilience against threats to its tourism and outdoor recreational assets. The assessment identifies current and potential risks and considers economic, health and socio cultural issues. | 11 SUSTAINABLE CITIES AND COMMUNITIES; 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |
| **Climate Action** | The destination has identified potential impacts of climate change on and from its tourism and outdoor recreation industries to advance strategies for adaptation and mitigation The destination and/or a destination sanctioned authority regularly raises awareness and shares information on climate change impacts and risks with residents, businesses, and visitors and relevant climate change adaptation and greenhouse gas reduction strategies. | 13 CLIMATE ACTION |
| **Emergency Response** | The destination has an up-to-date crisis and incident response plan to coordinate action in the case of an emergency. The plan details procedures and protocols to be followed in the event of a natural or man-made emergency incident or disaster and assigns roles and responsibilities, and allocates resources for implementation. The plan is publicly available and was developed or updated within the last five years with input from multiple stakeholders and institutions. | 3 GOOD HEALTH AND WELL-BEING; 11 SUSTAINABLE CITIES AND COMMUNITIES; 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |
| **Safety & Security** | The destination has appropriate systems in place to ensure a safe and secure environment for both residents and visitors. The destination coordinates with Search and Rescue and Emergency Management Response teams to plan and coordinate safety protocols at recreation areas throughout the destination including all key assets and attractions. | 3 GOOD HEALTH AND WELL-BEING; 16 PEACE, JUSTICE AND STRONG INSTITUTIONS |
| **Public Health** | The destination has identified potential impacts of public health emergencies on the community and its tourism and outdoor recreation industries to advance strategies for better resilience. The destination proactively shares information on public health emergencies and risks with residents, businesses, and visitors. | 3 GOOD HEALTH AND WELL-BEING |
| **Waste Management** | The destination has a solid waste management policy, plan, and/or system in place that includes measurement, monitoring, and public reporting of waste generation by volume and type, establishes targets for reduction, and details actions for reducing, reusing, and recycling solid waste, particularly single use plastics and food waste. The destination has institutions, facilities, and/or services responsible for properly collecting, treating, and disposing of solid waste, including hazardous material. All waste is disposed of safely and sustainably. | 12 RESPONSIBLE CONSUMPTION AND PRODUCTION; 14 LIFE BELOW WATER; 15 LIFE ON LAND |

| Best Practice | General Description | SDGs |
|---|---|---|
| **Water Management** | The destination has comprehensive potable water management plans and infrastructure in place that consider demand, redundancy and stewardship and conservation of surface, ground and storage capacity. Efforts extend to businesses and community stakeholders. | 12 RESPONSIBLE CONSUMPTION AND PRODUCTION / 14 LIFE BELOW WATER |
| **Water Quality** | The destination continuously monitors and evaluates water quality to ensure safe use for residents and visitors. | 12 RESPONSIBLE CONSUMPTION AND PRODUCTION / 14 LIFE BELOW WATER |
| **Wastewater Management** | The destination has systems in place to ensure wastewater is managed properly so not to adversely impact human health or the environment. | 12 RESPONSIBLE CONSUMPTION AND PRODUCTION / 14 LIFE BELOW WATER |
| **Energy Management** | The destination has an energy management policy, plan, and/or system in place that includes measurement, monitoring, and public reporting of energy consumption, establishes targets for reduction, improved efficiency, and adoption of renewable energy sources, and details actions for reaching targets. Programs, policies and incentives for energy conservation and the use of renewable energy are in place for businesses and community stakeholders. | 12 RESPONSIBLE CONSUMPTION AND PRODUCTION / 13 CLIMATE ACTION |
| **Emissions Management** | The destination pursues greenhouse gas emission reduction, mitigation, and/or adaptation strategies as part of its climate change mitigation efforts. There is a program to support local businesses in reducing and mitigating emissions from all aspects of their operations including from suppliers and service providers. | 13 CLIMATE ACTION |
| **Pollution Management** | The destination takes measures to minimize the adverse effects of light and noise pollution on residents, visitors, and the environment. | 3 GOOD HEALTH AND WELL-BEING / 11 SUSTAINABLE CITIES AND COMMUNITIES |

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|---|---|---|---|---|
| **1 NO POVERTY** | **2 ZERO HUNGER** | **3 GOOD HEALTH AND WELL-BEING** | **4 QUALITY EDUCATION** | **5 GENDER EQUALITY** |
| **6 CLEAN WATER AND SANITATION** | **7 AFFORDABLE AND CLEAN ENERGY** | **8 DECENT WORK AND ECONOMIC GROWTH** | **9 INDUSTRY, INNOVATION AND INFRASTRUCTURE** | **10 REDUCED INEQUALITIES** |
| **11 SUSTAINABLE CITIES AND COMMUNITIES** | **12 RESPONSIBLE CONSUMPTION AND PRODUCTION** | **13 CLIMATE ACTION** | **14 LIFE BELOW WATER** | **15 LIFE ON LAND** |
| **16 PEACE, JUSTICE AND STRONG INSTITUTIONS** | **17 PARTNERSHIPS FOR THE GOALS** | | | |