



Regional strategic tourism plan

# San Diego County



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The majority of the grant funds were used to directly support tourism recovery through marketing initiatives. With the EDA's oversight, a portion of the grant was directed to the development of these plans, which are designed to build a more resilient travel and tourism sector in California. While the one-time nature of the grant does not provide funding for ongoing implementation, the plans identify existing resources that can be leveraged at the state and regional level.

Visit California extends its gratitude to the diverse project teams, strategic partners and industry experts whose contributions were instrumental throughout the two-year process.



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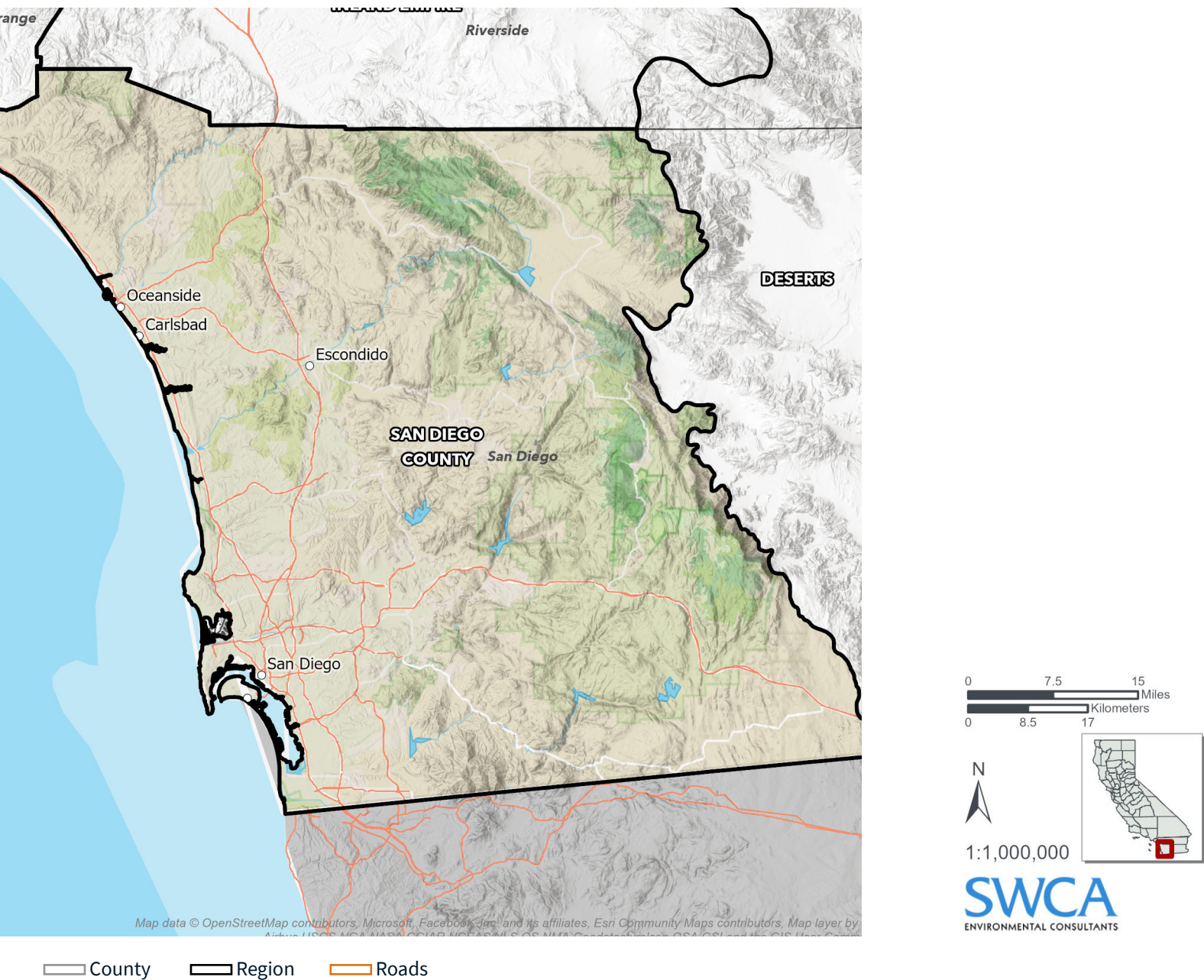
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# Executive summary

*The San Diego region, encompassing 18 incorporated cities including San Diego, Escondido, Carlsbad, Oceanside and Coronado, is renowned for its Southern California coastline, diverse cultural experiences and economic vitality. In 2023, the region’s travel industry demonstrated robust growth, with total travel spending reaching \$16.1 billion, a 4.6% increase from the previous year.*





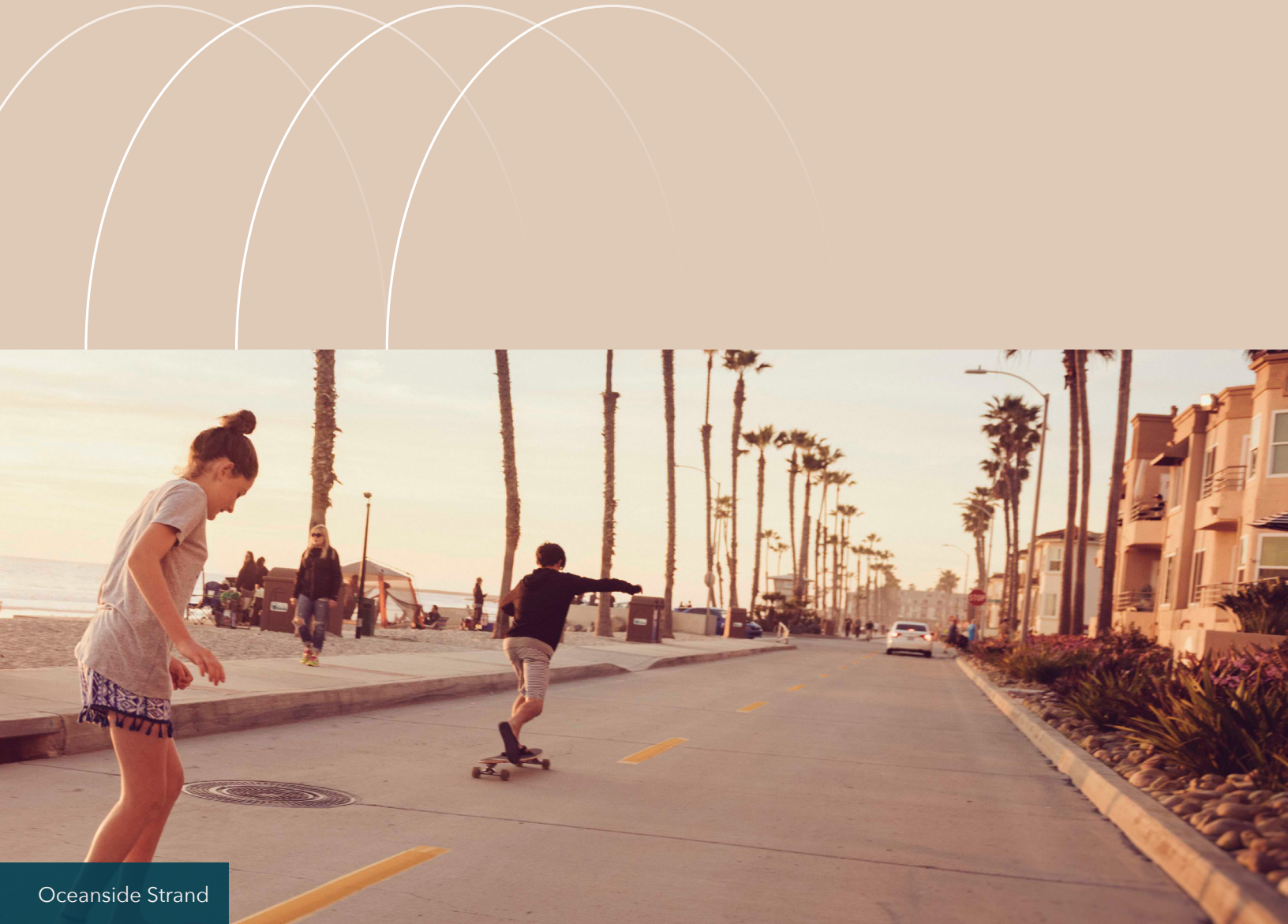
To develop a comprehensive tourism strategy, Jones Lang LaSalle and Visit California conducted an extensive two-year planning process involving multiple stakeholder engagement methods and in-depth market research. This process included monthly regional advisory committee meetings with 20-plus members, tourism stakeholder surveys with 68 participants, 10 focus groups with nearly 100 total participants, over 100 individual interviews with key industry stakeholders and site visits to 75-plus points of interest throughout the San Diego region. This multifaceted approach ensured a thorough understanding of the region’s tourism landscape and opportunities for growth.

The research process utilized several proprietary tools and methodologies:

The tourism readiness index, developed in collaboration with the World Travel & Tourism Council, analyzed nearly 4,000 data points across 68 indicators. Results showed San Diego surpasses state averages in six out of eight [index pillars](#), particularly in scale, business, safety & security, concentration and environmental readiness. The region is classified as a “mature performer,” indicating a well-developed tourism infrastructure with strong seasonal performance.

The [demand driver scorecard](#) evaluated 226 attractions and experiences in the region. 36% of scored assets generate regional or national demand, with 21 attractions identified as national or worldwide demand drivers. 87% of assets are family-friendly and 40% are classified as outdoor recreation.

The [event matrix](#) process assessed over 50 events, identifying 23 unique events positioned to drive national and regional demand.



Oceanside Strand



Based on these findings and stakeholder input, five strategic priorities were identified for the San Diego region:

- 1** Invest in tourism product development: enhance cultural tourism, develop events and festivals strategy and expand outdoor recreation offerings.
- 2** Improve tourism-related transportation infrastructure: enhance connectivity between key visitor points of interest and existing transportation nodes, establish visitor transit passes and address tourism workforce pipeline and training.
- 3** Promote regional marketing and messaging: craft regional marketing campaigns, create a digital marketing platform and promote responsible travel.
- 4** Promote community engagement and balance: increase communication with communities, share tourism performance indicators and maintain positive perception of the tourism economy.
- 5** Address workforce development: enable policy options to support workforce development, promote awareness of career opportunities and expand frontline training programs.



Speed Boat Adventures, San Diego



These strategies aim to address the unique challenges of the San Diego region, including its diverse geography, transportation needs and the balance between tourism growth and community well-being. Implementation will require ongoing collaboration among local stakeholders, destination marketing organizations, businesses and community organizations.

In conclusion, San Diego’s tourism potential is significant, with its blend of natural beauty, cultural attractions and outdoor recreation opportunities. The strategic plan emphasizes the importance of balancing tourism growth with community needs, infrastructure development and sustainable practices. By addressing key challenges and leveraging its strengths, the region can enhance its appeal as a year-round destination while ensuring sustainable development and preserving its iconic landscapes.

JLL and Visit California extend their gratitude to the San Diego Regional Advisory Committee members for their invaluable contributions throughout this process. Their continued involvement will be essential in supporting the implementation of these strategic opportunities and ensuring the long-term success of tourism in the San Diego region. Please refer to the committee participants in the [Appendix](#).





# Regional research and discovery

To ensure a comprehensive approach to this plan, the San Diego regional strategic plan integrates insights from stakeholder engagement and regional research and discovery to develop a clear vision and strategy. Throughout two years of the planning process, extensive regional research and discovery was conducted to gain an in-depth understanding of the current state of the tourism industry and identify potential areas for growth. JLL leveraged proprietary strategic planning tools, extensive stakeholder feedback and research previously conducted by Visit California to better understand each region. Many of the insights from these findings have been critical to the foundational opportunities in this plan.



Piazza della Famiglia, San Diego



*The regional research and discovery section includes vast research which has been detailed further and organized under the following categories for the San Diego region.*

### **JLL-conducted research components:**

- 1 State of the region overview: the overview provides a brief introductory summary of what currently impacts the tourism industry in the San Diego region.**
- 2 Destination plans review database: data gathering process which included 19 individual plans inventoried; elements include addressing housing, employment, guiding development and preserving existing neighborhoods, protecting the environment, improving pedestrian experience and walkability, reducing commuting out of the city, promoting larger open spaces in specific areas and ensuring a multimodal, sustainable city and much more.**
- 3 Stakeholder engagement: this section incorporates feedback from multiple different methods outlined here:**
  - Regional advisory committees: meetings held monthly for approximately 24 consecutive months with a committee consisting of 20-plus members. Please refer to the **Appendix** for a full list of members.
  - Tourism stakeholder survey: over 65 participants representing a diverse range of individuals and organizations involved in the tourism sector. The feedback summary highlights perspectives on strengths, weaknesses and growth opportunities.
  - Focus group feedback: in a small group environment, discussions were conducted with stakeholders from 10 different sectors, including hotels and lodging; tourism and visitor experience; meetings and conventions; workforce; restaurants and retail; arts; culture and heritage; resilience and sustainability; and economic development; infrastructure and transportation; and diversity, equity and inclusion. Through these discussions, valuable insights were gathered on specific areas of interest and growth potential.
  - Individual interviews feedback: over 50 key industry stakeholders interviewed, offering a deeper understanding of perspectives and addressing any specific questions or concerns.
  - Site visits: visited 75-plus points of interest throughout the San Diego region across three weeks, providing valuable insights and observations.
- 4 Tourism readiness index: detailed data analysis process that used nearly 4,000 data points to assess the readiness and capacity of the tourism industry in the San Diego region.**
- 5 Demand driver scorecard: evaluation which identified the key assets and experiences driving visitor demand in the region.**
- 6 Event matrix: evaluation which identified key events driving visitor demand in the region.**
- 7 Destination sustainability plans: data gathering process which included six municipal plans inventoried; elements include addressing carbon neutral goals, water quality and management, housing, employment, guiding development and preserving existing neighborhoods, protecting the environment, improving pedestrian experience and walkability, reducing commuting out of the city, promoting larger open spaces in specific areas and ensuring a multimodal, sustainable city and much more.**

### **Visit California provided research, JLL reviewed components:**

- 7 The Economic Impact of Travel (Dean Runyan Associates, 2023)**
- 8 Visit California Community Sentiment Study (Future Partners, 2023)**

A comprehensive research approach allowed for the development of a clear vision and strategy for the San Diego region's tourism industry, with foundational opportunities rooted in data, insights and stakeholder feedback.

## State of the region

*The San Diego County region encompasses 18 incorporated cities, including San Diego, Escondido, Carlsbad, Oceanside, Coronado and more, representing a vibrant and thriving area known for its Southern California coastline, diverse cultural experiences and economic vitality.*

San Diego, often described as “America’s Finest City,” serves as the hub of this region, blending natural beauty with a strong, dynamic economy and a broad range of attractions. The San Diego region is a single county region with four DMOs and tourism departments.

In 2023, the San Diego County region experienced a remarkable surge in its travel and tourism industry, with total travel spending reaching \$15.3 billion, an impressive 8.4% growth from the previous year. Visitor expenditures alone accounted for \$10.4 billion, while additional travel-related expenditures contributed \$4.9 billion. This significant growth underscores the region’s recovery postpandemic, bolstered by its enduring appeal as a prime travel destination. (The Economic Impact of Travel, Dean Runyan Associates, 2023)



San Diego Pride Parade



# State of the region

San Diego County is renowned for its superb climate, miles of pristine beaches and an array of entertainment options catering to diverse interests. Whether it’s exploring the vibrant downtown districts with its trendy Gaslamp Quarter, strolling through the historic corridors of Old Town or enjoying the world-famous San Diego Zoo and San Diego Zoo Safari Park, visitors and locals alike are afforded numerous opportunities for recreation and leisure. The region boasts expansive natural preserves and parks, such as Balboa Park, Anza-Borrego State Park, Cleveland National Forest and Torrey Pines State Natural Reserve, offering extensive hiking trails, scenic vistas and unique flora and fauna.

A study by Visit California revealed the compelling attractiveness of the San Diego County region, with high marks for beautiful beaches (89%), excellent outdoor activities (85%) and quality dining options (82%). Popular attractions include beaches like La Jolla Shores and Coronado Beach, famous amusement parks such as LEGOLAND California and SeaWorld San Diego and the thriving local craft beer scene. While the region excels in providing a plethora of amenities, residents have noted issues such as beach overcrowding (32%) and traffic congestion (29%). (Visit California Community Sentiment Study, 2023)

The cultural tapestry of the San Diego County region is enriched by its diverse population, representing various ethnicities and cultural backgrounds, including four tribal nations and 18 Native American reservations — the most in a single county in the United States. This diversity manifests in an eclectic mix of culinary delights, vibrant festivals and a rich arts scene. From the flavors of Little Italy to the cultural offerings in Barrio Logan, the San Diego region presents a mosaic of experiences that celebrate its multicultural heritage.

In summary, the San Diego region combines urban sophistication, natural beauty and a lively cultural scene and continues to attract millions of visitors each year. Its robust travel industry, beautiful landscapes and diverse communities ensure that it remains a premier destination for both tourists and residents.



Fashion Valley, San Diego

# Destination plans review database

The regional strategic tourism strategic planning process was designed to examine issues from a regional perspective, building upon the valuable work already completed in destination-specific plans by DMOs, convention and visitor bureaus and municipalities. This approach ensures that existing efforts are leveraged and enhanced rather than duplicated.

The comprehensive review encompassed 500 plans across California, including several significant planning efforts in and around San Diego County. These included San Diego County's comprehensive plan, sustainability plans and economic development plan. City of San Diego plans were also reviewed, including economic development, housing and climate action plans. Regional plans included the Metro Transit Authority transit plan and local DMO plans from SDTA, Visit Oceanside, Visit Carlsbad and Discover Coronado. A full list of the reviewed plans can be found in the [Appendix](#).

*Upon analysis of the San Diego plans, several key themes were identified that align with the priorities highlighted in the present plan.*

## 1 Economic development and vitality

- Business attraction and retention
- Business diversification
- Job creation and workforce development
- Bi-national needs for businesses and workforce
- Tourism diversification and promotion

## 2 Transportation and mobility

- Multimodal transportation options
- Pedestrian and bicycle infrastructure
- Public transit improvements
- Traffic management and congestion reduction

## 3 Housing

- Housing inventory shortage and needs
- Housing affordability

## 4 Environmental sustainability and climate action

- Climate change adaptation and mitigation
- Conservation of natural resources
- Water quality management
- Water efficiency and management
- Emergency preparedness

## 5 Community health and quality of life

- Parks and open space expansion
- Recreation opportunities
- Public health and safety
- Arts and cultural development
- Services for disadvantaged communities

Working in conjunction with the regional advisory committee and armed with insights from the existing plans, the approach sought to examine regional issues holistically. This methodology was further validated through the engagement process. It is crucial to consider this regional plan in the context of destination-specific plans, recognizing that it does not aim to reinvent existing strategies. Instead, the regional plan serves to complement and align with these destination plans, while simultaneously reinforcing the significance of regional cooperation and engagement.



# Stakeholder engagement

*Stakeholder input was collected through multiple methods (outlined below in detail), including regional advisory committee discussion forums, a series of topical focus groups, a comprehensive tourism survey, a thorough site visit and individual meetings with tourism stakeholders, industry leaders and related entities.*

## **Regional advisory committees**

Regional advisory committees were monthly gatherings composed of industry leaders within hotels and lodging, culture, economic development, meeting and events, resilience and sustainability, restaurants, retail districts, municipal representation and more. Meetings were held monthly for approximately 16 consecutive months. The committee consisted of 20-plus members, of which a full list can be found in the [Appendix](#).

## **Tourism stakeholder survey**

Questions from the survey capture a variety of topics, including travel preferences, satisfaction levels with accommodations, transportation, attractions, etc., suggestions for improvement and more. The tourism survey was conducted anonymously to encourage feedback and diverse perspectives from various sectors across the region, while asking overall demographics and industry profile questions to shed light on the represented stakeholder groups. This survey garnered 68 responses from across the San Diego region.

## **Focus groups**

Focus groups were conducted to discuss key themes and gather qualitative data. There were 10 focus groups conducted with nearly 100 total participants, including DMOs; lodging; restaurant; retail; entertainment; culture and heritage; economic development; workforce development; resilience and sustainability; transportation and infrastructure; meetings; events; conventions; diversity, equity and inclusion and more.

## **Individual interviews**

Individual meetings were held with stakeholders to collect detailed feedback. The stakeholders included industry leadership and management, supporters and individuals concerned with tourism’s potential challenges and impacts on San Diego County. The interview process encompassed 100-plus individual interviews, including all members of the regional advisory committee.

## **Site visits**

Multiple visits were conducted to the San Diego County region to immerse further in the local environment, engage directly with stakeholders, visit tourism sites and attractions and witness firsthand the dynamics of the tourism industry in San Diego County. Over 75 points of interest were visited throughout San Diego County across three different trips to the region.

The diverse set of perspectives ensured the study comprehensively captured both the benefits and potential drawbacks of tourism. All stakeholder feedback also provided key guidance and direction to become the basis of many opportunities, supported by real-life examples from site visits.

# Key themes from stakeholder engagement

*The various methods of stakeholder feedback reflected several major themes within the San Diego region.*

- Tourism and hospitality workforce development was a primary theme raised for the industry's future success in San Diego County. Additionally, the nature of being a border county with Mexico added challenges that are felt to be beyond the industry's control.
- Public transportation and mobility were continually cited as a priority with service needed to support workforce commutes. Additionally, transportation infrastructure to support visitor needs outside of downtown appeared to be a gap according to some stakeholders.
- Additional border-related challenges, including the water quality issue, were significant concerns during this planning process.
- A significant positive theme of almost all stakeholder discussions was the existing collaboration from entities across the county including public sector partners like the City and County of San Diego. Stakeholders felt that leadership across many of the industry organizations was in the a better position relative to past years and felt strongly about the current state of the industry's relationships.
- Stakeholders wanted to see San Diego County shine for more than what it is known for now with incredible coastline, beaches and weather. They noted culture, arts, parks, culinary and craft beverage as existing and continued growth opportunities across the county.
- Existing tourism product is very family-friendly with a culinary, nightlife and entertainment scene that is well-rounded for adults.
- The need for increased tourism product to remain competitive and develop/expand tourism to new areas of the county was raised.
- San Diego International Airport's expansion importance was routinely cited, with an emphasis on wanting to regain international, primarily Chinese, market share.
- Sustainable tourism practices seem to be in early stages. Municipal partners are climate aware and seem to be taking steps at their respective levels.
- Importance of the beaches and coastline was top of mind for many when addressing sustainability. Beach renourishment and coastal erosion were significant concerns to be addressed. Oceanside is particularly focused on this issue and was a great example of coastal management at work.
- Overall support for tourism and understanding of impacts is significant and well-known across the county.
- During peak seasons, beach and coastal destinations within the county are the most popular, resulting in increased demands and pressure on these assets.
- The military history and connection are a part of San Diego's brand and ongoing story.
- Stakeholders feel San Diego is a sports town despite the loss of the NFL presence. The San Diego Padres Petco Park is continuously ranked as one of the top stadiums in the country. Many cited professional sports as a missed opportunity and a growth area for San Diego. There may be a need for facility development to attract large anchor professional tenants.
- There was consistent discussion around ensuring San Diego is perceived as a top gateway city for international travel. Stakeholders often felt like LA and San Francisco overshadow the region.

The key themes identified above present a brief synopsis of the stakeholder conversations, focus group feedback, survey results and individual interviews. The themes supported the development of the priorities in this plan. The regional strategic planning process leveraged stakeholder feedback to validate research and direction for the future of the region. While this plan addresses many crucial aspects of tourism development, it is important to acknowledge that some identified issues fall outside the direct purview of the tourism industry and may require coordinated action from various levels of government and other sectors to effectively address.



# Tourism readiness index

## Overview

The first phase of the [regional research and discovery](#) involved an in-depth analysis of the San Diego region as a destination based on the tourism readiness index. The [tourism readiness index](#) is an analysis tool developed collaboratively by JLL and the World Travel & Tourism Council. The Index offers destinations an opportunity to evaluate and comprehend their own tourism preparedness based on 68 essential data points that directly influence the tourism industry. The indicators evaluate the current state of the region's tourism industry and identify potential areas for future growth.

The assessment encompasses research of various aspects within a destination's landscape, including traditional hotel performance metrics, infrastructure and capacity building, environmental sustainability requirements and more. With the insights provided by the tourism readiness index, destinations can gain a thorough understanding of growth readiness, enabling informed decisions and optimization of tourism strategies.

A comprehensive analysis was conducted on all 58 counties in California, examining a total of 68 indicators. The process resulted in the collection and organization of nearly 4,000 data points, categorized according to regional boundaries. All sources included were vetted by JLL and WTTC.

The tourism readiness index analyzed data for each region in the following categories:

- **Scale:** the capacity of the destination's tourism infrastructure, considering its size and volume.
- **Concentration:** the tendency to attract leisure visitors who focus on specific key attractions and areas.
- **Leisure:** evaluation of visitor spending, perceived attractiveness and specific attractions related to cultural and natural heritage sites and retail offerings.
- **Business:** the development of necessary infrastructure and products to support business travel.
- **Urban readiness:** investments in enhancing connectivity within the destination to attract business opportunities, talent and visitors.
- **Safety and security:** the prioritization of safety and security within policies and practices.
- **Environmental readiness:** the prioritization of sustainability through reflected strategies, policies and destination positioning.
- **Policy:** the integration of tourism policy within the destination's broader agenda.

These eight categories incorporate up to 15 data points grouped to create the pillars of tourism readiness. The data points in each pillar are weighted and scored. The outcomes from this analysis determine what features of the destination need to be prioritized to ensure long-term smart growth to positively impact the local economy through tourism's benefits. See the [Appendix](#) for further details on the tourism readiness index methodology.



South Coast Plaza, Costa Mesa

## San Diego results

The **tourism readiness index** reveals that the San Diego region is above state averages in six out of eight pillars, showcasing strong performance. Notably, the San Diego region stands out when compared to other regions in terms of scale, business, safety and security, concentration and environmental. However, it falls slightly behind in the urban readiness and policy categories.

In-depth analysis of data from reputable global databases such as Centre for Aviation, CoStar, Oxford Economics, TripAdvisor and more shed light on the factors contributing to the San Diego region’s strong readiness performance. For instance, the analyzed data highlights the positive impact of factors like diversity in tourism product, quality of lodging, air quality, LGBTQ+ safety, women’s safety and overall economic development policy when compared to other regions.

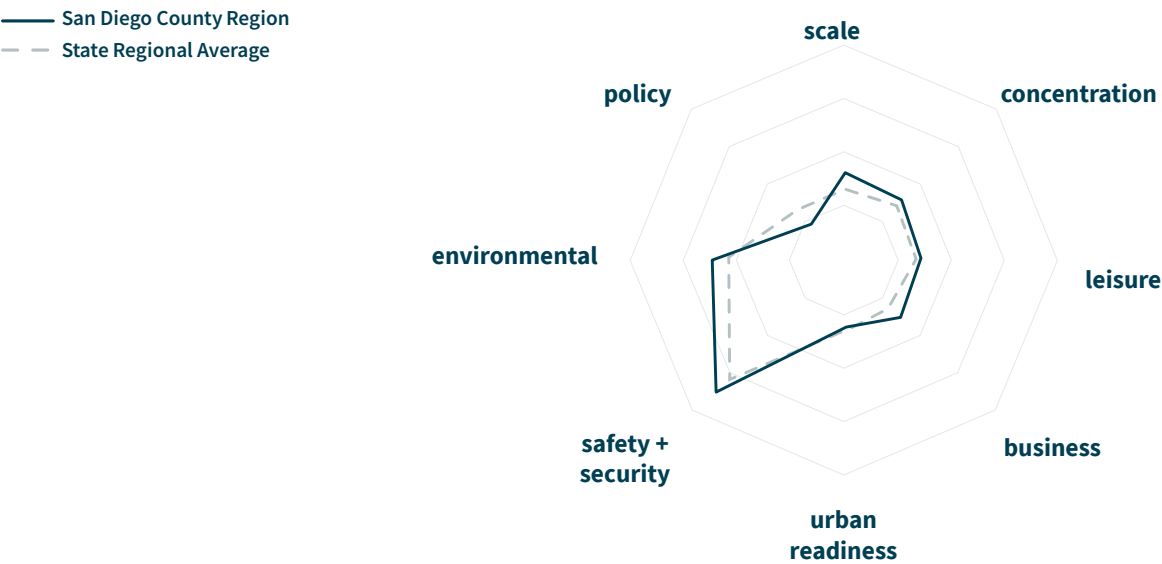
Conversely, certain data points contribute to the underperformance in areas such as short-term rental policy consistency, housing affordability and accessibility. These insights provide opportunities for targeted improvements to enhance the San Diego region’s overall tourism readiness and maintain its competitive edge.

Based on the results, the San Diego region is classified as a “mature performer.” This typology represents an established region/destination with a strong track record. The classification highlights the San Diego region’s well-developed tourism infrastructure and its ability to attract a diverse range of visitors over time.

As a mature performer, San Diego County should prioritize visitor management by enhancing visitor experiences, proactively managing pressures and engaging in targeted capacity building. By continuously improving the overall experience for visitors through investments in infrastructure, amenities, attractions and services, San Diego County region can maintain its position as an established destination. Additionally, preparing to proactively manage growth will be needed. Mature performers often experience seasonal risks like overcrowding, traffic and congestion. Engaging in capacity building by advocating and supporting workforce training, investing in technology and collaborating with stakeholders will help San Diego County handle increasing visitor numbers and evolving market preferences. Please refer to the **Appendix** for a more detailed overview of the tourism readiness index and all destination typologies.

Ongoing strategic planning, including regional research and discovery and targeting new visitor segments, will enable the San Diego region to maximize the utilization of its existing assets while identifying new growth opportunities. Finally, sustainable development practices should be prioritized to protect the environment, preserve culture and support local communities, reinforcing the San Diego region’s position as a premier global tourism destination. JLL has reviewed six individual municipal and county level plans within the region that address challenges and solutions related to guiding the future development, preservation and improvement of cities by addressing various aspects of land use, infrastructure, public services, environment, housing and economic development.

### Outcome by pillar





# Demand driver scorecard

## Overview

The regional strategic planning process utilized JLL's proprietary **demand driver scorecard** to evaluate the impact of individual regional assets and experiences and future investment opportunities. The **demand driver scorecard** is designed to establish a baseline and identify investment prospects within the tourism sector. Strategic planners, investors and developers gain the ability to make informed decisions backed by robust data and analysis. The scorecard assists destinations in strategic planning and guides stakeholders in the formulation of targeted marketing to maximize returns.

This scoring process was based on an evaluation which includes:

- **Multistep assessment:** evaluating and assigning points to each attraction or experience against eight key criteria, including current visitor demand levels, event opportunities, engaging visitor experience and more (further detail outlined in the [Appendix](#)).
- **Categorization as attractions vs. attractors/demand generators:** categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** classifying each attraction into a category based on overall points score. Categories were little to no visitor interest (0-20), interesting to do on a repeat visit (20-40), "must see" if in the area (40-60), regional attractors (60-80), national attractors (80-95) and global attractors (95-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Categorization of each demand driver:** segmenting assets into 13 unique market categories based on specific criteria and characteristics, including family-friendly attractions, museums, entertainment, educational attractions, outdoor recreation and more. Assets could be assigned to multiple relevant categories.

Categorization of a region's demand drivers helps assess the visitor experience, assists in strategic planning, identifies areas for future development or revitalization projects and enables the prioritization of enhancements to visitor-facing attractions. Overall, asset categorization provides a framework for a more organized and detailed analysis, aiding in regional research and discovery, planning and decision-making processes.



Little Italy, San Diego





San Diego Zoo

## San Diego results

The San Diego region **demand driver scorecard** process assessed 226 attractions and experiences across the region, which were identified by regional advisory committee members, desktop research and by JLL during site visits. The scoring and analysis is a representative analysis intended to highlight the significant inventory and diversity of assets in the San Diego region.

The results reveal that 36% of the scored assets are generating regional or national demand. Notably, 21 attractions and experiences are identified as national or worldwide demand drivers, including popular destinations such as the San Diego Zoo and San Diego Zoo Safari Park, Coronado Beach and the San Diego State University. Additionally, there are 66 assets and experiences categorized as regional demand drivers, with examples like LEGOLAND California, Torrey Pines State Natural Reserve, Fashion Valley and the San Diego Natural History Museum.

According to the analysis, 87% of assets scored in the region are considered family-friendly, with over 73 of these assets driving regional and national demand. Notable examples of family-friendly attractions include the San Diego Zoo and San Diego Zoo Safari Park, Coronado Beach and LEGOLAND California, among others. The abundance of family-friendly attractions in the region highlights the importance of catering to the needs and preferences of family travelers.

Furthermore, approximately 40% of the assets scored are classified as outdoor recreation, of which 43% are considered attractors for the region. The outdoor recreational areas encompass popular destinations such as La Jolla Cove, Torrey Pines State Natural Reserve and Torrey Pines Golf Course, among others. It is essential to underscore the significance of preserving and maintaining the natural assets within the region. Natural resources, such as beaches, parks and mountains, not only enhance the quality of life for residents but also play a vital role in attracting visitors and driving tourism.

As a third and final example, 14% of all assets are related to culture, heritage and history, of which 31% or 9 assets are classified as attractors. These assets include Point Loma, 'The Unconditional Surrender' statue and the Coronado History Museum, among others.

Driven by the insights obtained from the **demand driver scorecard**, it is evident that cultural, heritage and historical assets play a vital role as key drivers of visitor demand in the San Diego region. Recognizing the significance of these assets, the region can strategically leverage and showcase its rich cultural fabric to attract additional visitors. Focusing on targeted cultural tourism will not only attract visitors with a specific interest in culture but also appeal to a broader audience seeking unique and immersive travel experiences. This strategic approach can contribute to the overall growth and sustainability of the tourism industry in the San Diego region and will further be explored as a priority in the opportunities section.

The demand driver scorecard analysis findings have supported the identification of key priorities and the formulation of opportunities to continue positioning the San Diego region for sustainable success.



# Event matrix

## Overview

The [event matrix](#) process encompassed a thorough evaluation of existing annual leisure-facing events within each region. The assessment helps tourism stakeholders understand which events generated the most impact and more specifically, what aspects of event planning could further enhance the event. Similar to the demand driver scorecard, JLL’s event matrix product involves a dedicated analysis of individual events, charting their outcomes and impacts based on overall scores.

The iterative approach enables continual refinement and optimization as events are held each year. It empowers regions, DMOs and event organizers to stay ahead of market trends and make strategic adjustments to optimize event offerings, ensuring events remain competitive in the ever-changing landscape of the industry.

The event matrix process included:

- **Identifying significant events:** collaborated with RAC members and DMO’s to inventory regionwide event master list.
- **Utilizing comprehensive criteria:** scoring each event based on 11 detailed criteria aligned with the broader tourism landscape, such as event infrastructure, planning, marketing and potential economic impact.
- **Categorizing events based on score:** categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** classifying each attraction into a category based on overall points score. Categories were community-based events (0-60), regional events (60-80), national events (80-95) and global events (95-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Evaluating critical mass:** assessing the overall volume and significance of current events, identifying need periods, gaps and opportunities.
- **Leveraging outcomes:** developing optimal calendar programming and identifying specific opportunities to enhance events.
- **Collaboration:** working closely with the regional advisory committee to review effective tactics, addressing study results and engaging individual event organizers in the future.

This approach ensures a well-informed understanding of the event landscape and helps in positioning regions for success by focusing on high-impact events. See [Appendix](#) for further detail on the event matrix methodology.



Belmont Park, San Diego



*San Diego results*

The San Diego region event matrix process inventoried and scored over 50 events across the region that were collaboratively identified by the regional advisory committee, during visits to the region, noted as high priority in stakeholder surveys and validated as significant current and future room night generators during stakeholder discussions. Similar to its demand drivers, the San Diego region hosts an array of annual events, with a diversity of events across the region and throughout the year.

The outcomes from this analysis identified 23 unique events that are positioned to drive national and regional demand to the San Diego region, including the Breeders Cup World Championships, Ironman Oceanside, World Design Capital San Diego, La Jolla Concours d'Elegance, Kaaboo Del Mar, Farmers Insurance Open and many others. The high-impact events drive extensive leisure tourism, reinforce the positive nature of the San Diego region brand and enhance the destination's visibility.

Hoteliers, retailers, creative economy representatives and other regional representatives reinforced the significant annual economic impacts of these events. San Diego region events also exhibit limited seasonality, meaning events attract visitors consistently throughout the year.

Several additional events were analyzed, such as Kids Free San Diego, San Diego Symphony Summer Season, Sea World: Halloween Spooktacular and San Diego Beer Week among others. While these events attract some visitors, overall scores indicate these events are primarily local in nature and contribute relatively less overnight visitation and economic impact as compared to other annual events in the region.

The results of the [event matrix](#) indicate stakeholder focus should be placed on regional annual events that have a greater potential for driving overnight visitation and substantial economic impact. Further, it is recommended that the [event matrix](#) is utilized on an ongoing basis as an objective approach to evaluating the event inventory at any given time to assess the impacts of current events in the region.

Additionally, it is highly recommended to supplement the utilization of the [event matrix](#) with external resources to support events with regional impact. Collaborating with local DMOs, economic development organizations and industry experts can provide valuable insights, data and expertise to further evaluate the potential economic benefits and overnight visitation drivers of current and future regional annual events. This collaborative approach in conjunction with the [event matrix](#) ensures a comprehensive and well-informed decision-making process when assessing the overall impact of current events in the region.



Little Italy, San Diego



## Key themes from the research process

- Widespread stakeholder engagement played a crucial role in developing the regional strategic plan, with input gathered through various methods such as interviews, surveys, site visits and focus groups.
- Key themes that emerged from the engagement process include the recognition that continuously improving the regional visitor and attendee experience is crucial for the success of the region. Both the leisure and group segments were identified as playing vital roles in driving economic growth and sustaining a thriving visitor economy. The themes will be further explored in the opportunities section of this plan.
- JLL's **tourism readiness index** classifies San Diego County as a “mature performer” with a well-developed tourism infrastructure and strong performance in categories like scale, leisure and business readiness.
- As a mature performer, San Diego County should prioritize visitor management by enhancing visitor experiences, proactively managing pressures and engaging in sustainable capacity building.
- The San Diego region **demand driver scorecard** process assessed 226 attractions and experiences across the region. An investment prioritization approach based on the results of the scorecard should be put into motion during the first year of implementation.
- The **demand driver scorecard** results highlight the significant inventory and diversity of attractions and experiences in the San Diego region, with 36% of scored assets generating regional or national demand.
- The San Diego region **event matrix** process inventoried and scored 50 events across the region. It indicated the events that should be focused on going forward.
- The **event matrix** analysis identified 23 unique events in the San Diego region that are positioned to drive national and regional demand, attracting visitors consistently throughout the year.

Throughout the planning process, JLL also conducted an in-depth review of research and data provided by Visit California. Below is a summary of the findings for the San Diego region.



The Rooftop by STK





The Lafayette Hotel

**The Economic Impact of Travel**

*(Dean Runyan Associates, 2023)*

This report provides a comprehensive analysis of the economic effects of travel on California’s state economy. It addresses various key metrics such as travel spending, earnings, employment and tax receipts, broken down by county and tourism regions. The data below is based on estimates and research conducted by Dean Runyan Associates for Visit California.

In summary, in 2023, San Diego County achieved a significant milestone in its travel industry, with total travel spending reaching \$16.1 billion, a 4.6% growth from the previous year. Visitor spending accounted for \$13.8 billion, while additional travel-related expenditures added \$2.2 billion. This upward trend reflects strong recovery and robust growth postpandemic, highlighting the county’s attractiveness and resilience as a travel destination.

The economic contributions of travel in San Diego County were profound. Employment within the travel industry surged by 5.5%, providing 100,690 jobs. Direct travel-generated earnings increased by 13.8% to \$5.3 billion, with key sectors such as accommodations, food services and entertainment showing substantial growth.

These economic impacts underscore the critical role that travel and tourism play in the San Diego County region’s economy. The growth in travel spending, job creation and tax revenue demonstrates the indispensable nature of the tourism sector in driving economic development. This positive trend aids not only in the region’s economic recovery but also in sustaining the diverse and vibrant experiences that make San Diego County a top destination.

Strategically, the San Diego County region should continue to focus on leveraging its natural beauty, outdoor recreational opportunities and cultural offerings to maintain and enhance its competitive edge in the travel industry. Continued investment in infrastructure, marketing and sustainable tourism practices will be essential to support this sector’s growth. Engaging with the community and addressing issues like traffic congestion, environmental sustainability and the impact on quality of life will further solidify the region’s reputation as a world-class travel destination.

By balancing tourism’s economic benefits with community needs and environmental considerations, the San Diego region can continue to thrive as an attractive and resilient destination. The ongoing contributions of the travel industry to the region’s economy and quality of life underscore its importance and the potential for future growth and development.





The Lodge at Torrey Pines

**Visit California Community Sentiment Study**  
*(Future Partners, 2023)*

The Visit California Community Sentiment Study provides detailed findings and insights from various regions, including demographic data and the perceptions of residents regarding tourism. The study explores both the benefits and strains of tourism on local communities and regions, highlighting aspects such as economic opportunities, traffic congestion and quality-of-life impacts. Specifically, the San Diego region is examined in terms of its residents’ views on tourism’s economic contributions, the challenges it creates and overall community sentiment.

Key findings for the San Diego region indicate that residents highly value local amenities such as beautiful beaches (89%), excellent outdoor activities (85%) and quality dining options (82%). Popular tourist attractions include the San Diego Zoo and San Diego Zoo Safari Park, Balboa Park, beaches like La Jolla Shores and Coronado Beach and entertainment districts like the Gaslamp Quarter. While residents greatly appreciate these features, concerns regarding beach overcrowding (32%) and traffic congestion (29%) are notable.

Residents generally perceive tourism as a net positive, enhancing local business opportunities and fostering job creation. Over half of the residents agree that tourism’s benefits outweigh its challenges both locally (55%) and regionally (58%). Tourism is viewed as crucial to the regional economy, with 64% of locals recognizing its importance for their community and 77% for the broader region. Additionally, around 43% feel that their quality of life is elevated by tourism, indicating room for strategic enhancements.

The dual impact of tourism in the San Diego region is clear. Residents acknowledge significant business opportunities and job creation supported by the tourism industry. However, notable challenges such as traffic congestion (33%), overcrowding at popular attractions (28%) and beach congestion (27%) present ongoing concerns. These issues highlight the need to balance economic benefits with the maintenance of local infrastructure and environmental resources.

Strategically, the San Diego region might focus on balancing tourism’s economic benefits with quality-of-life improvements. Addressing traffic congestion, overcrowding and environmental sustainability through enhanced infrastructure and policy initiatives could strengthen tourism’s positive perception. Promoting lesser-known local attractions can help distribute visitor pressure more evenly, reducing stress on the most popular sites. A targeted campaign highlighting the symbiotic relationship between tourism and community well-being might also foster resident support and minimize resistance.

By managing tourism strategically to maximize its benefits while mitigating its challenges, the San Diego region can continue to thrive as a premier destination that supports both the economy and the quality of life for its residents. Continued investment in sustainable tourism practices and community engagement can further enhance the region’s appeal and resilience, ensuring it remains a cherished destination for visitors from around the world.

# San Diego regional opportunities

The San Diego regional opportunities outline a comprehensive set of priorities and strategies to enhance the region’s tourism industry while addressing its unique challenges and opportunities. These strategies are based on extensive research, stakeholder engagement and analysis of San Diego’s distinctive attributes.

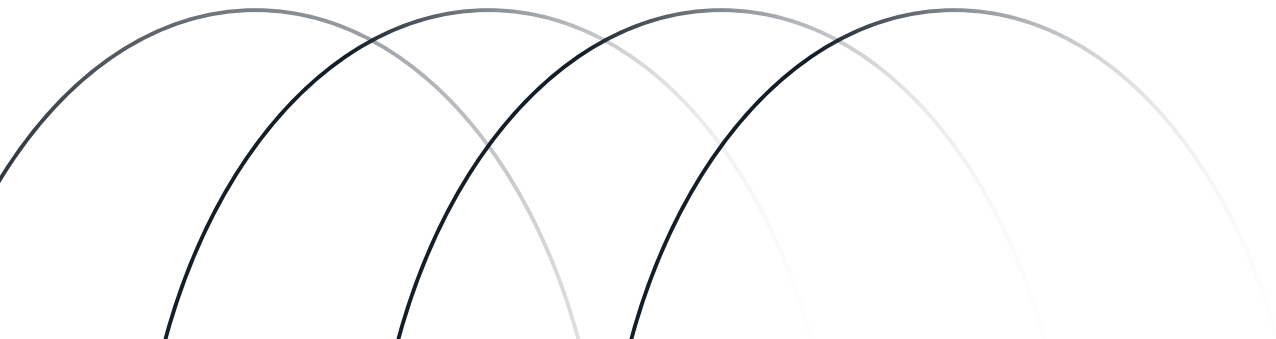
The priorities focus on four key areas: investing in tourism product development, improving tourism-related transportation infrastructure, enhancing regional marketing and messaging and promoting community engagement and balance. Each priority area is accompanied by specific strategies designed to capitalize on San Diego’s diverse assets, address existing challenges and position the region as a premier, year-round destination for a wide range of visitors.

The opportunities aim to balance tourism growth with community needs and sustainable practices, recognizing San Diego’s status as a mature destination with strong year-round performance. Strategies include enhancing cultural tourism, developing events and festivals, expanding outdoor recreation offerings, improving transportation connectivity, crafting targeted marketing campaigns and fostering community engagement.

These priorities and strategies provide a road map for stakeholders, DMOs and partners across the San Diego region to collaborate and implement in the coming years. The goal is to create a more resilient, diverse and sustainable tourism ecosystem that benefits visitors and local communities while preserving the region’s natural beauty and cultural heritage.

San Diego Tourism Authority has been in the process of updating its Stewardship Plan and has worked collaboratively in this process to ensure the regional plan is reflective of the local plans. In the draft published in October 2024, SDTA reaffirms that commitment to the regional effort and this plan does the same by reflecting on the partnerships within the region. Similarly, Discover Coronado has been going through a strategic planning update and has worked to incorporate Visit California’s regional efforts, as well as partnership with SDTA throughout. Visit Oceanside and Visit Carlsbad also have working plans for their respective destinations with increased partnerships across the region. This collaboration was true throughout the planning process and will be critical to continue during implementation. The recommendations contained here are reflective not only of those plans and communities but the partnership to support the region and the advancement of the tourism industry.

By focusing on these strategic priorities, San Diego can enhance its appeal as a diverse destination, address infrastructure and workforce challenges and ensure that tourism growth contributes positively to the local economy and quality of life for residents. The plan emphasizes the importance of leveraging San Diego’s unique blend of urban sophistication, natural beauty and cultural richness to maintain its competitive edge in the tourism industry.





# 1 Invest in tourism product development

## Cultural tourism

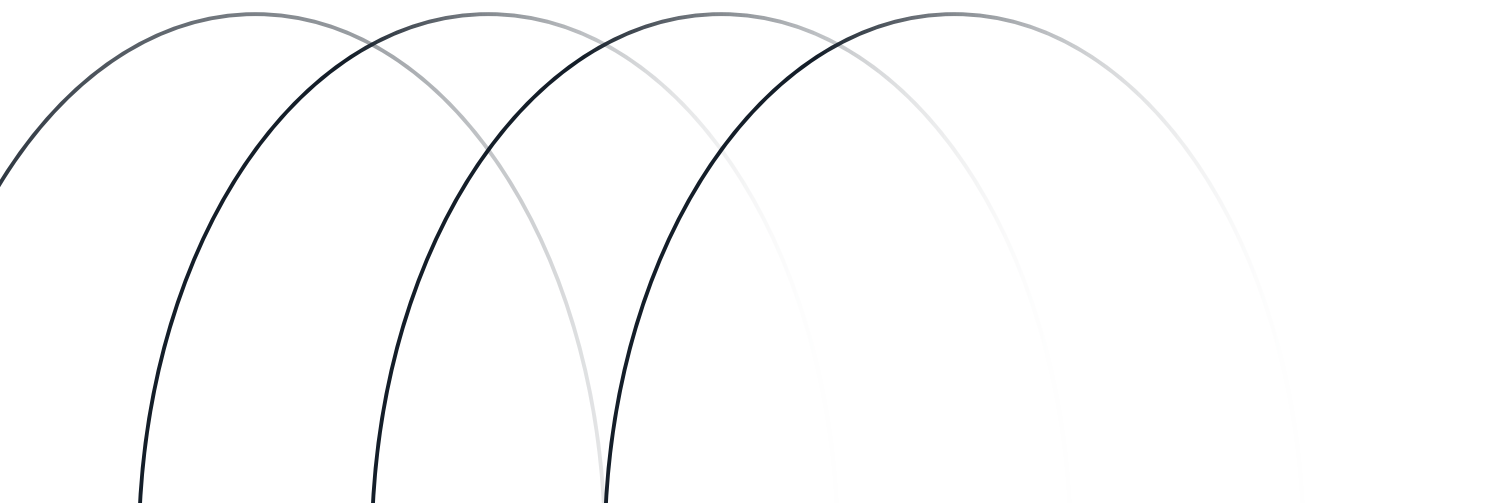
The San Diego region presents a rich and diverse landscape for cultural tourism. Stakeholder feedback throughout the planning process consistently highlighted culture, arts and heritage as existing and continued growth opportunities across the county. This recognition underscores the wealth of cultural resources available in the area, ranging from the region’s Indigenous heritage to its vibrant arts scene and diverse culinary experiences.

The comprehensive assessment of 226 attractions and experiences in the San Diego region revealed interesting findings regarding the area’s cultural resources. This market research indicated that 14% of all assets studied are related to culture, heritage and history, of which 31% were classified as attractors. The current offerings for arts and culture in San Diego County have a strong foundation and should include Balboa Park, San Diego Museum of Art, Museum of Contemporary Art San Diego in La Jolla, Arts District Liberty Station and more. For a coastal region with so many high-profile assets and attractions, this inventory of cultural resources provides a strong foundation for potential growth in visitor segmentation.

San Diego County uniquely boasts 18 Indigenous reservations — the most in a single county in the United States. This rich Indigenous presence contributes significantly to the cultural tapestry of the region. The cultural diversity of San Diego is further reflected in its eclectic mix of culinary delights, vibrant festivals and thriving arts scene. From the flavors of Little Italy to the cultural offerings in Barrio Logan, the San Diego region presents a mosaic of experiences that celebrate its multicultural heritage and diversity.

Cultural tourism development in San Diego should prioritize leveraging and showcasing its rich cultural fabric to attract additional visitors. Any initiatives to encourage visitation to Indigenous sites should be developed in partnership with the local tribe. There should be clear, tribe-sanctioned guidelines communicated to tourists on how to respectfully engage at these sites. Focusing on targeted cultural tourism will not only appeal to visitors with a specific interest in culture but also attract a broader audience seeking unique and immersive travel experiences.

This strategic approach can drive sustainable growth in San Diego’s tourism industry by diversifying offerings, elevating the region’s national and international profile and extending visitor stays through cultural experiences. Both the city’s [Creative City Plan](#) and San Diego Tourism Authority’s [San Diego Tourism Stewardship Plan](#) identify the need for cultural tourism growth as a cornerstone of advancement. Alignment with these efforts will be a key component of the tourism ecosystem’s expansion and a reflection of local community efforts.

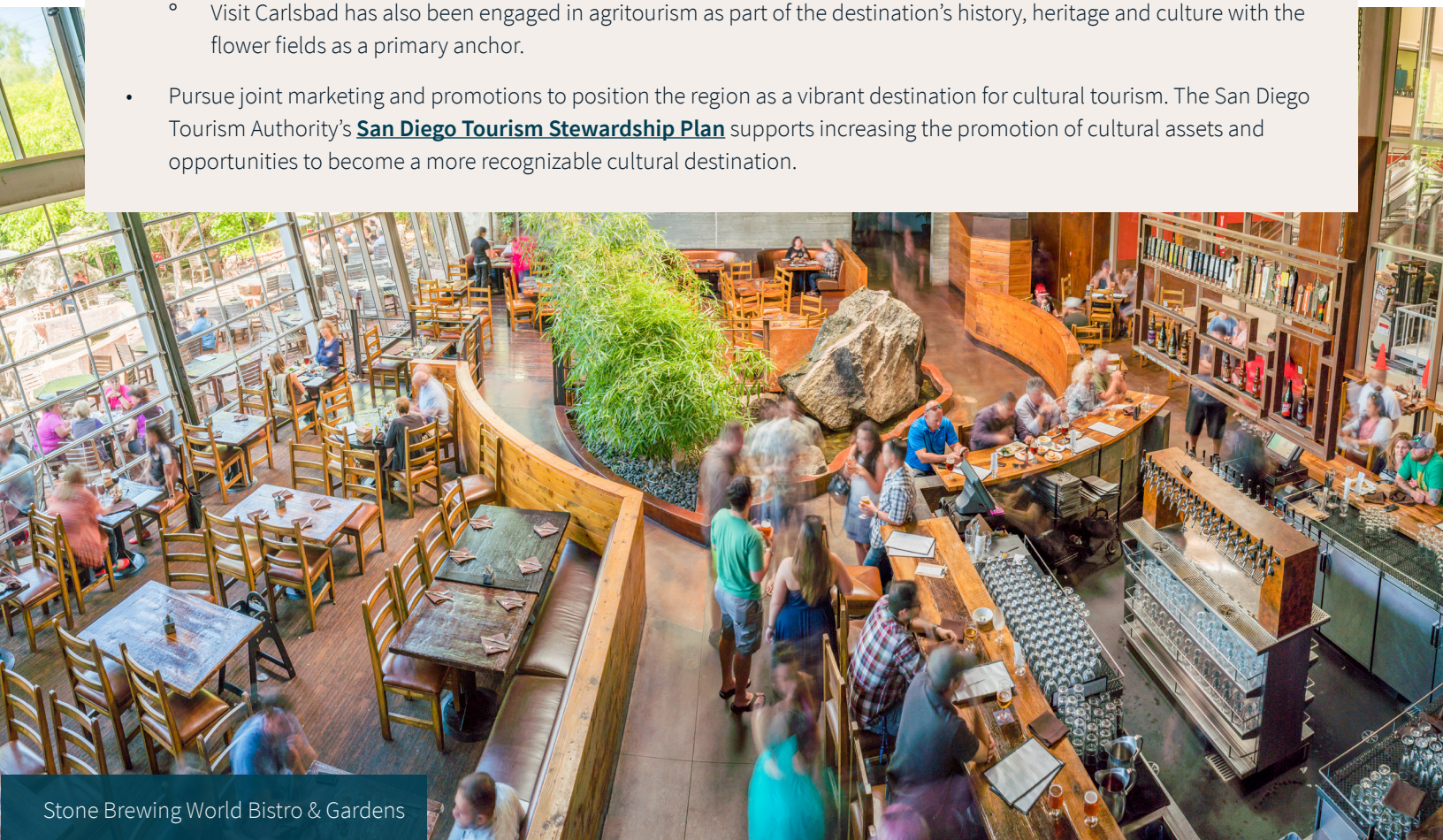


### *Key partners*

San Diego Tourism Authority, San Diego County Arts and Culture Commission, Balboa Park, Visit Carlsbad, Visit Oceanside, Discover Coronado, City of San Diego, County of San Diego, Gaslamp Quarter, California Arts Council

### *Strategies*

- Advance the cultural tourism experience by proactively planning and strategizing with the Commission for Arts and Culture, which was enacted by the county in 2023, as well as the City's Arts and Culture Commission, Department of Cultural Affairs and its recent November 2024 [Creative City Cultural Plan](#). These plans align around the understanding that arts, culture and community vibrancy are critical to San Diego's global competitiveness.
- Leverage existing arts and cultural offerings to create packaged experiences that could be promoted and sold by partners across the region, including DMOs to further San Diego's positioning as a global cultural destination as cited in the Creative City Cultural Plan — a 10-year plan released in 2024.
- Work with the county to expand programming and activations in the eastern/noncoastal communities of the county to extend the visitor reach and experience as well as develop new and emerging destinations within the county for tourism growth through arts and culture.
- Work with Visit Oceanside and Visit Carlsbad on agritourism product development.
  - Visit Oceanside's wine region was designated in September 2024 by the Department of the Treasury Alcohol and Tobacco Tax and Trade Bureau as the "San Luis Rey" American viticultural area. Wineries, breweries and agritourism have long been part of the county's culture and this official designation will add value in promotional and growth opportunities.
  - Visit Carlsbad has also been engaged in agritourism as part of the destination's history, heritage and culture with the flower fields as a primary anchor.
- Pursue joint marketing and promotions to position the region as a vibrant destination for cultural tourism. The San Diego Tourism Authority's [San Diego Tourism Stewardship Plan](#) supports increasing the promotion of cultural assets and opportunities to become a more recognizable cultural destination.



Stone Brewing World Bistro & Gardens



Events & festivals

The San Diego region boasts an impactful events landscape, as revealed by the [event matrix](#) process. Over 50 events were inventoried and scored, with 23 unique events identified as drivers of national and regional demand. These high-impact events, including the Breeders Cup World Championships, Comic-Con International: San Diego, Cymbiotika San Diego Open, Oceanside’s Super Girl Surf Pro and La Jolla Concours d’Elegance, not only drive extensive leisure tourism but also reinforce the region’s positive brand image.

San Diego’s events attract visitors consistently throughout the year, mitigating overtourism concerns during peak seasons. This balanced distribution positions the region as a year-round destination for event-driven tourism.

To maximize the potential of events and festivals, it is crucial to focus on regional annual events with greater promise for driving overnight visitation and substantial economic impact. The ongoing utilization of the [event matrix](#) as an objective approach to evaluating the event inventory will be important in assessing the impacts of current events and identifying opportunities for growth.

While the analysis highlights the strength of San Diego’s event offerings, it’s important to note that some events were found to be primarily local in nature. These events, while valuable to the community, contribute relatively less to overnight visitation and economic impact compared to other annual events in the region.

Moving forward, it is recommended that the region continue to invest in high-profile events and supplement the [event matrix](#) with external resources and collaborate with local DMOs, economic development organizations and industry experts. This approach will ensure a comprehensive and well-informed decision-making process when assessing and developing the overall impact of events in the San Diego region.

Key partners

San Diego Tourism Authority, San Diego County Arts and Culture Commission, Balboa Park, Visit Carlsbad, Visit Oceanside, Discover Coronado, City of San Diego, County of San Diego, Gaslamp Quarter, California Arts Council

Strategies

- Adopt the [event matrix](#) across the region to consistently invest in and set standard performance criteria for events and drive measurable impact on the destination.
  - Granting agencies — local municipalities, economic development organizations, DMOs and related groups — should work with event organizers and utilize this tool to conduct ongoing research and gather data to enhance event programming.
  - As identified in San Diego Tourism Authority’s [San Diego Tourism Stewardship Plan](#), events are critical and the need to “support expansion of new events across all submarkets” is a key initiative that should be leveraged in partnership for implementation across the region.
- Invest in further study and exploration of sports tournaments and national, professional level facilities to host both sports and nonsporting events.
  - While not necessarily the same set of criteria, sporting events are another significant opportunity for regional exploration and collaboration, which requires both funding and facilities and will continue to require partnership across the region.

**Outdoor recreation**

The San Diego region boasts an exceptional array of outdoor recreational assets, making it a premier destination for nature enthusiasts and adventure seekers. According to the [demand driver scorecard](#), approximately 40% of the 226 assessed assets in the region are classified as outdoor recreation. Remarkably, 43% of these outdoor recreational assets are considered attractors, highlighting their significant role in drawing visitors to the area.

Key outdoor attractions include iconic locations such as La Jolla Cove, Torrey Pines State Natural Reserve and Torrey Pines Golf Course. These destinations not only showcase the region’s natural beauty but also serve as powerful drivers of tourism demand.

The region’s appeal extends beyond its natural wonders, with 87% of scored assets considered family-friendly. This unique combination of outdoor recreation and family-oriented attractions positions San Diego as an ideal destination for diverse visitor groups.

As the region looks to the future, balancing tourism growth with sustainable practices will be crucial. The preservation and strategic enhancement of these natural assets will play a vital role in maintaining San Diego’s competitive edge in the tourism industry while ensuring the long-term health of its ecosystems.

By leveraging its outdoor recreational offerings alongside its cultural and urban attractions, San Diego can continue to attract a wide range of visitors, boost its local economy and solidify its position as a top-tier destination for nature-based tourism.

*Key partners*

San Diego Tourism Authority, San Diego County Arts and Culture Commission, Balboa Park, Visit Carlsbad, Visit Oceanside, Discover Coronado, City of San Diego, County of San Diego, Gaslamp Quarter, California Arts Council

*Strategies*

- Diversify the promotion of outdoor recreation experiences beyond the iconic coastline and draw visitors to less-traveled parts of the county, including Cleveland National Forest, Anza-Borrego Desert State Park, French Mountain and others. As part of the [City of San Diego Complete Communities Plan](#) recreation and parks are a key focus. Leverage the capital efforts as part of the City’s Parks Master Plan to expand recreation offerings in the City. Similarly, the County released its 2024-2029 strategic plan to expand parks, greenspace and facilities at these recreational sites across the county.
- Work with regional partners to create new outdoor recreation experiences, including active and passive experiences, to further diversify the regional experience and drive incremental visitation to less-traveled areas of the county and divert potential overtourism.
- Develop educational campaigns aimed at visitors to promote responsible behavior during outdoor activities.
- Emphasize [Leave No Trace](#) and [Cleaner California Coast](#) principles as well as the [California Responsible Travel Code](#), with their guidelines on minimizing waste, respecting wildlife, staying on designated trails and leaving nature undisturbed.
- Provide educational signage and materials at city and county parks at trailheads, campsites and visitor centers to raise awareness about the importance of preserving the environment.
- Expand on existing golf product to capture the golf tourism revival, as golf has grown 20% in the last five years according to the American Golf Industry Coalition. The San Diego region has golf headquarters and iconic course name recognition.
- Develop a regional campaign to show diverse experiences across the county.



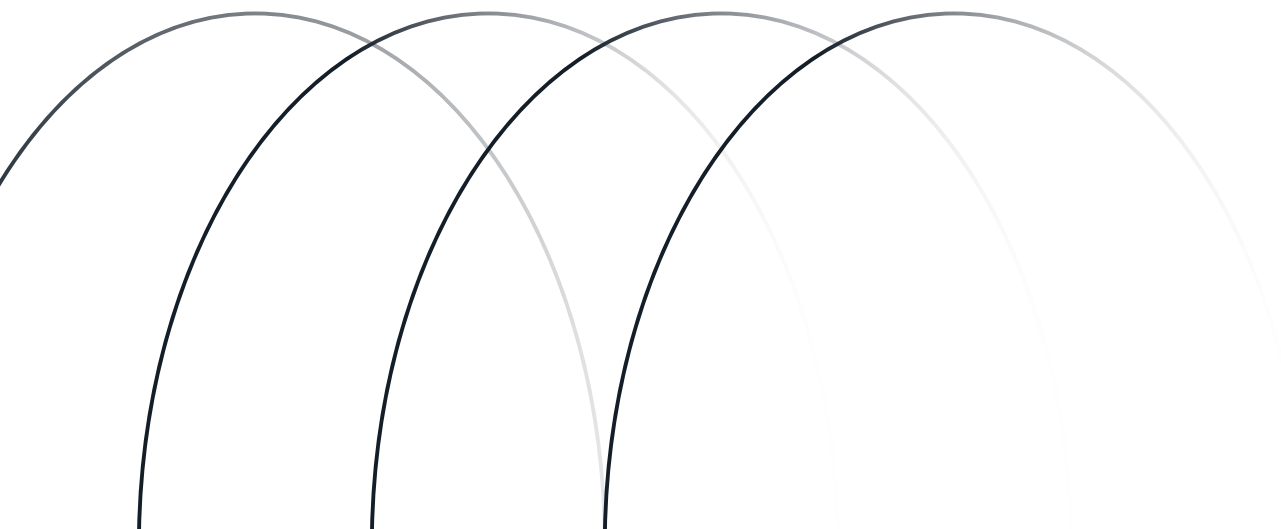
# 2 Improve tourism-related transportation infrastructure

San Diego’s sizable geographic area and diversity makes it a destination of choice for travelers from across the country and internationally. However, gaps in infrastructure will become a bigger issue as the county continues to grow. Desirability of the coastal sections of the region with its iconic assets and vistas draw millions of people annually to San Diego, an estimated 30.5 million in fiscal year 2023 according to the San Diego Tourism Authority. This level of visitation combined with a multifaceted nature of the county spanning from coast to desert makes connectivity, transportation and the need for workforce support (including training and housing) critical components of tourism related infrastructure. The [City of San Diego’s Strategic Plan](#) specifically identified a priority to advance mobility and infrastructure, as well as a priority to foster regional prosperity. These priorities align directly with many findings in the regional tourism plan contained here.

The need for increased airlift, particularly international airlift into the county, will be a significant opportunity with the expansion of San Diego International Airport’s Terminal 1 project. The expansion includes 30 new gates, expanded security lanes for efficiencies, parking, restaurants and more. The project is anticipated to be fully complete by 2028 with the full demolition of the existing Terminal 1.

Commuters can try out transit services free with a one-month pass in the [“Try Transit”](#) program sponsored by San Diego Metropolitan Transit System, the North County Transit District and the San Diego Association of Governments. The goal is to increase ridership and decrease solo drivers. In a qualifying emergency, riders can be reimbursed up to three times per year for a “guaranteed ride home” via taxi, ride share such as Lyft Standard or Uber X, rental car or transit — and receive a reimbursement for up to \$100 per ride. These kinds of initiatives are great ways to increase ridership on public transit for community members but are not directed at the visitor. Additionally, the only on airport-service is the San Diego Flyer, which runs between the airport and Old Town Transit Center.

Tourism, as an industry, is not adequately represented and planned for in overall transportation discussions, according to stakeholders in this planning process. This gap in representation can mean visitor needs are missed and, therefore, not only is the service and experience lacking, but the visitor impact is limited.



### *Key partners*

Metropolitan Transit System, San Diego Association of Governments, North County Transit District, San Diego Tourism Authority, City of San Diego, County of San Diego, Port of San Diego, San Diego International Airport

### *Strategies*

- Work across agencies and industry partners to share data on points of interest with underserved transit connectivity.
- Establish park and ride services for visitors similar to the commuter program.
- Establish a singular visitor transit pass to increase ridership and reduce solo drivers on the road.
- Institute parking reservations at key points of interest during peak season to manage visitor flow.
- Establish data sharing to advocate and account for future needs.
- Create easy access and low-impact ways to travel to and around greater San Diego as identified in the San Diego Tourism Authority's San Diego Tourism Stewardship Plan.
- Work with the San Diego Tourism Authority on visitor transportation campaigns to market increased services.



La Jolla Cove



# 3 Enhance regional marketing and messaging

The San Diego marketing and branding efforts by the San Diego Tourism Authority and the San Diego Tourism Marketing District have driven significant awareness of the region and driven hundreds of millions of dollars into the economy — \$304 million in fiscal year 2023 according to a recent report from the San Diego Tourism Authority. Stakeholders unanimously supported the San Diego Tourism Authority’s efforts and praised the collective work across the San Diego Tourism Authority, Visit Carlsbad, Discover Coronado and Visit Oceanside.

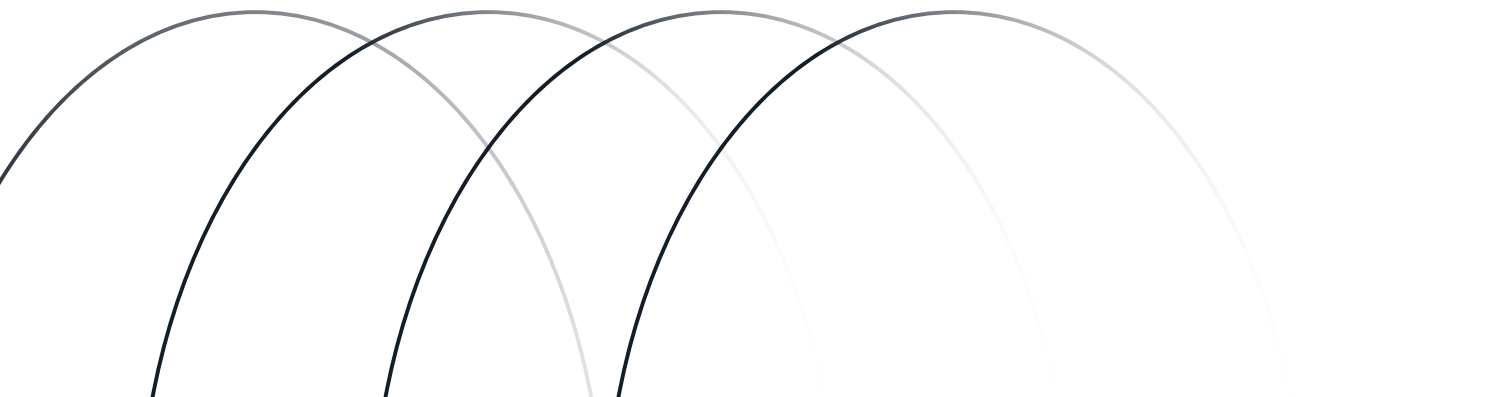
The San Diego Tourism Authority runs programming for members and provides marketing platforms for members to be a part of and has demonstrated strong value to the industry. Opportunity remains in further leveraging that solid foundation and drawing new and increasing visitors to the county.

*Key partners*

San Diego Tourism Authority, Visit Carlsbad, Visit Oceanside, Discover Coronado, San Diego Tourism Marketing District

*Strategies*

- Create a digital marketing platform to engage with target audiences for trip planning.
- Refine vertical marketing at the regional level to better account for arts and cultural travelers, sports tourism, event-based tourism and outdoor recreation.
- Develop regional campaigns that highlight and include transportation options within the region.
- Expand on the position of the City of San Diego and downtown as a hub/gateway to experience the broader region.
- Address responsible travel needs and messaging across key groups to ensure this message is consistent.
- Leverage findings in the resilience and sustainability scorecard to craft specific messaging for visitor behavior.



# 4 Promote community engagement and balance

Community benefit and resident engagement are key considerations for tourism stakeholders, policy makers and the entirety of the tourism-economic development ecosystem around and within a community. According to Visit California's Omnitrack Resident Sentiment Research from 2023, 61% of residents in the San Diego region are highly positive about tourism — the highest rating in the state.

In the categories of job creation and local tax revenue generation, San Diego County residents support tourism at a significantly high rate of 64% and 60% respectively — also the highest ratings across the state. Residents feel positive about tourism contributing to improved living standards at 43%, enhancing quality of life at 46% and creating shopping, dining and entertainment opportunities at 67%. However, residents also feel strongly that tourism contributes to the high cost of living in the region. This data indicates the region does support the industry and there is a valuable contribution the industry makes to the region and to communities' benefit.

Additionally, the City of San Diego's plan, [A Plan for All of Us](#), speaks directly to many of these opportunities to promote and manage community growth. From the perspective of parks, housing, mobility, sustainability and neighborhood planning, balancing community needs is pivotal. Placemaking and tourism are cited in the City's plan to develop and preserve neighborhoods. The county's [General Plan](#) has specific community plans to "guide development to reflect the character and vision for each unincorporated community, consistent with the General Plan (Policy LU-2.1)."

## Key partners

San Diego Tourism Authority, Visit Carlsbad, Visit Oceanside, Visit Escondido, Discover Coronado, City of San Diego, County of San Diego and respective municipal leaderships

## Strategies

- Increase communication, drive awareness, share resources and have two-way conversations with communities and community-based organizations to maintain an above-average perception of the tourism economy.
- Work with regional partners to establish a regular communications schedule and touchpoints.
- Integrate community plan initiatives as appropriate with county leadership for unincorporated communities.
- Share outcomes on key performance indicators for tourism performance that impact residents on a regular basis (annual, seasonal, etc.). KPIs could include:
  - Visitor dispersal and flow (percent of visitors dispersed to new and diverse points of interest)
  - Traffic counts and reduction
  - Job retention and mitigation of seasonal impact to the economy
  - Sales and use taxes reinvested in community
- Leverage findings from SDTA's plan to message to and across communities and partner across city and county to further foster regional prosperity and understanding.



# Conclusion

The San Diego Regional Strategic Tourism Plan marks a transformative step in the effort to collectively advance the region’s dynamic tourism sector. This comprehensive two-year initiative, incorporating extensive stakeholder input, rigorous market analysis and strategic planning, has yielded a forward-thinking framework poised to propel San Diego’s tourism industry into a new era of innovation and sustainable growth.

This research, leveraging tools such as the tourism readiness index, demand driver scorecard and event matrix, has illuminated San Diego’s unique position in the tourism landscape. As a “mature performer” with robust year-round appeal, San Diego stands at a crucial juncture — balancing its established success with the need for strategic evolution to maintain its competitive edge.

The planning process identified four key priorities that will shape San Diego’s tourism future: investing in tourism product development, improving tourism-related transportation infrastructure, enhancing regional marketing and messaging and promoting community engagement and balance. These priorities, backed by actionable strategies, are tailored to capitalize on San Diego’s diverse assets — from its sun-soaked beaches and world-class attractions to its rich cultural tapestry and burgeoning culinary scene.

Central to this effort is striking a harmonious balance between San Diego’s natural allure and its urban sophistication. The ultimate long-range goal of this regional plan is to enhance cultural tourism, optimize event offerings, expand the mobility network and create a more seamless visitor experience — while alleviating pressure on the region’s most popular destinations.

The plan’s success hinges on unprecedented collaboration among stakeholders, including DMOs, civic leaders, businesses and community organizations. San Diego’s unique position as a binational location offers distinct opportunities and challenges, demanding innovative cross-border initiatives and partnerships.

Looking ahead, the region’s focus on sustainability and community integration will be pivotal. This commitment can result in smart urban solutions and initiatives that ensure tourism growth enhances, rather than compromises, the quality of life for San Diego residents.

The path forward will require communication and coordination across industry and government partners. In an ever-evolving tourism landscape, the ability to adapt to emerging trends — from technological advancements to shifting traveler preferences — will be crucial.

This plan was developed with the input of hundreds of local, regional and state stakeholders whose contributions will shape the industry and regional community for years to come. From the dedicated regional advisory committee to the diverse stakeholders who shared their insights, their participation in the planning process has been beneficial. Thanks to all those who contributed.

When the transition from planning to implementation takes place, it’s expected the San Diego region’s tourism industry will approach it with enthusiasm and resolve. San Diego, with its unique blend of coastal charm, urban vibrancy and cultural richness, has long been a beacon for travelers worldwide. This strategic plan aims to amplify San Diego’s allure, ensuring it remains a top-tier destination for generations to come, while driving economic prosperity, environmental stewardship and community enrichment.

# Appendix

## Regional advisory committee members

JLL extends its heartfelt appreciation to the entire Visit California team, the dedicated members of the regional advisory committee, as well as the stakeholders and partners across the community who actively participated in the regional strategic tourism planning process for the San Diego region. Without their unwavering support and commitment, this plan would not have been possible. Thank you all for your contributions.

Name	Organization
Corrine Brindley	SeaWorld Parks and Entertainment
David Miller	San Diego Zoo
Julie Pastor	LEGOLAND California Resort
Kim Sidoriak	Visit Carlsbad
Leslee Gaul	Visit Oceanside
Todd Little	Discover Coronado
Kerri Verbeke Kapich	San Diego Tourism Authority
Michael Trimble	Gaslamp Quarter Association
Steve Lockett	San Diego County
Christina Bibler	City of San Diego, Economic Development
Jennifer Schoeneck	City of Escondido
Jerry Sanders	San Diego Regional Chamber of Commerce
Job Nelson	Port of San Diego
Robert Gleason	Evans Hotels
Jennifer Flohr	California Association of Boutique & Breakfast Inns
Jodi Rudick	La Jolla Village Merchants Association
Mike Morton Jr.	Brigantine Restaurant Group
Peter Comiskey	Balboa Park Cultural Partnership



# Engaged destination marketing organizations and convention and visitors bureaus

JLL extends its sincere thanks to the destination marketing organizations and convention and visitors bureaus, whose partnership and expertise were essential to the success of this project. Their insights into local tourism landscapes and their commitment to collaboration were invaluable.

Organization
Discover Coronado
San Diego Tourism Authority
Visit Carlsbad
Visit Oceanside



San Diego Maritime Museum

# Destination plans review database

A review of the following existing regional plans was conducted to establish context and identify key priorities and available resources for this project:

City/County	Name of plan
Carlsbad	Carlsbad General Plan
Carlsbad	Carlsbad Tourism Plan
Chula Vista	City of Chula Vista General Plan
Coronado	Climate Action Plan
Coronado	City of Coronado General Plan
Coronado	Discover Coronado Strategic Business Plan
Del Mar	City of Del Mar Community Plan (General Plan)
El Cajon	City of El Cajon General Plan 2000
Encinitas	City of Encinitas General Plan
Escondido	City of Escondido General Plan
Imperial Beach	City of Imperial Beach General Plan/Local Coastal Program Land Use Plan
La Mesa	La Mesa General Plan
Lemon Grove	Lemon Grove General Plan
National City	National City General Plan
Oceanside	Oceanside General Plan
Oceanside	Oceanside Sustainable Tourism Plan
Poway	Poway Comprehensive Plan
San Diego	City of San Diego General Plan 2008
San Diego	San Diego Tourism Authority (SDTA) Stewardship Plan
San Diego	City of San Diego Climate Action Plan
San Diego	Port of San Diego Master Plan
San Diego County	County of San Diego General Plan
San Diego County	County of San Diego Climate Action Plan
San Marcos	City of San Marcos General Plan
Santee	Santee General Plan
Solana Beach	City of Solana Beach General Plan
Vista	General Plan Vista 2030



# Focus group attendees

JLL extends its sincere gratitude to all the focus group participants, whose valuable insights and contributions were essential to the development of this plan. Your time and expertise are deeply appreciated.

Name	Organization
Priscila Damasceno	Cormorant Boutique Hotel, Birdseye Rooftop Restaurant and Bar
Scott Blaul	Inn by the Sea
Danielle Boyles	Hotel del Coronado
CJ DiMento	City of Oceanside
Robyn Davidoff	Sierra Club Seal Society
Brenda Fake	Friends of Coast Walk Trail
Amy Steward	Coronado City Council, Emerald Keepers
Jayne Timberlake	RE:BEACH Oceanside
Christophe Cevasco	Beeside Balcony
Eric Adler	Puesto, Marisi
Emma Elmes	Fox Restaurant Concepts
Giang Meyers	County of San Diego
Jennifer Schoeneck	City Manager's Office, City of Escondido
Emily Lynch	Office of San Diego City Council President Joe LaCava
Japhet Perez Estrada	Japhet's Painting Company
Bianca Beale	So Diego Tours
Lauren Lockhart	La Jolla Historical Society
Kathryn Kanjo	Museum of Contemporary Art San Diego
Claudia Ludlow	Glorietta Bay Inn
Latrell Crenshaw	County of San Diego Black Chamber of Commerce, City of San Diego
Sunny Lee	Business Improvement District Alliance, Discover Pacific Beach
Natália Oliveira Petrova	Cormorant Boutique Hotel
Ransom Fierro	Empress Hotel
Jodi Rudick	La Jolla Village Merchants Association
Kerri Verbeke Kapich	San Diego Tourism Authority
Kim Sidoriak	Visit Carlsbad
Leslee Gaul	Visit Oceanside
Todd Little	Discover Coronado
Julie Coker	San Diego Tourism Authority
Brad Elsass	Ace Parking
Andy Fotsch	La Jolla Village Merchants Association

# Stakeholder interviewees

JLL expresses its sincere thanks to stakeholders and interviewees for their collaborative spirit and willingness to share their knowledge. Their partnership was invaluable in achieving the goals of this project.

Name	Organization
Amber Jensen	Port of San Diego
Amy Harbert	County of San Diego, Environmental Health and Quality
Bri Fordem	Anza-Borrego Foundation
Chena Popper	San Diego Natural History Museum
Chris Connolly	San Diego Padres
Christina Bibler	City of San Diego, Economic Development
Danielle Boyles	Hotel del Coronado
David Koontz	USS Midway Museum
David Miller	San Diego Zoo Wildlife Alliance
Erika Kohler	San Diego Zoo Wildlife Alliance
Hampton Brown	San Diego International Airport
Harold Rapoza	Hotel del Coronado
Ilsa Butler	Evans Hotels
James Sly	East County Economic Development Council
Jaymie Bradford	San Diego Regional Chamber of Commerce
Jennifer Flohr	California Association of Boutique & Breakfast Inns
Jennifer Schoeneck	City of Escondido
Jerry Sanders	San Diego Regional Chamber of Commerce
Joanna Axelrod	City of Escondido
Jodi Rudick	La Jolla Village Merchants Association
Judy Gradwohl	San Diego Natural History Museum
Julie Coker	San Diego Tourism Authority
Julie Pastor	LEGOLAND California Resort
Kavin Schieferdecker	San Diego Tourism Authority
Kerri Verbeke Kapich	San Diego Tourism Authority
Kim Becker	San Diego International Airport
Kim Sidoriak	Visit Carlsbad
Leslee Gaul	Visit Oceanside
Michael Trimble	Gaslamp Quarter Association
Mike Morton Jr.	Brigantine Restaurant Group
Nathan Bishop	Downtown San Diego Partnership
Raquel Arapicio	Governor's Office of Business and Economic Development
Rip Rippetoe	San Diego Convention Center
Robert Gleason	Evans Hotels
Steve Lockett	San Diego County
Todd Little	Discover Coronado



# Visited points of interest

The following points of interest were visited to gather firsthand information and context for this project:

Point of interest	Location
Anza-Borrego State Park	Anza Borrego State Park
Carlsbad Lagoon Recreation Area	Carlsbad
Downtown Carlsbad	Carlsbad
LEGOLAND California Resort	Carlsbad
Park Hyatt Aviara	Carlsbad
The Goods Donut Shop	Carlsbad
Bayside Park	Chula Vista
Galley at the Marina	Chula Vista
Gaylord Hotel Development Site	Chula Vista
San Diego Bay National Wildlife Refuge	Chula Vista
Convention Center District	San Diego
Petco Park	San Diego
Coronado Beach	Coronado
Coronado Golf Course	Coronado
Coronado Marriott	Coronado
Ferry Landing	Coronado
The Henry	Coronado
Hotel Del Coronado	Coronado
Lowes Coronado	Coronado
Orange Avenue Shops	Coronado
Encinitas Shoppes	Encinitas
Queen Calafia's Magical Circle	Escondido
The US Grant	San Diego
La Jolla Cove	La Jolla
La Valencia	La Jolla
Museum of Contemporary Art	La Jolla
The Grill at Torrey Pines	La Jolla
The Lodge at Torrey Pines	La Jolla
The Village	La Jolla
Torrey Pines State Nature Reserve	La Jolla
Pier 32 Marina	National City
Mission Bay	San Diego
Oceanside Harbor Village	Oceanside
Oceanside Pier	Oceanside
Cleveland National Forest	Pine Valley

Point of interest	Location
Balboa Park	San Diego
Liberty Public Market	San Diego
Liberty Station Esplanade	San Diego
NTC Park	San Diego
Old Town	San Diego
Port of San Diego	San Diego
San Diego International Airport	San Diego
San Diego Zoo	San Diego
Seaport Village	San Diego
Seaworld San Diego	San Diego
Stone Brewing World Bistro & Gardens	San Diego
The Rady Shell at Jacobs Park (Amphitheater)	San Diego
USS Midway Museum	San Diego
Gaslamp Quarter	San Diego
Las Americas Premium Outlets	San Ysidro
Mission Trail Regional Park/Old Mission Dam	Santee
Santee Boulders	Santee
Santee Lakes Recreation Preserve	Santee
Alpine	Alpine
Bonita	Bonita
Bonsall	Bonsall
Borrego Springs	Borrego Springs
Campo	Campo
Cardiff-by-the-Sea	Encinitas
Casa de Oro	Spring Valley
Crest	El Cajon
Del Mar	Del Mar
Descanso	Descanso
El Cajon	El Cajon
Fallbrook	Fallbrook
Imperial Beach	Imperial Beach
Jacumba	Jacumba
Jamul	Jamul
Julian	Julian
La Mesa	La Mesa
Lakeside	Lakeside

# Visited points of interest (cont.)

Point of interest	Location
Lemon Grove	Lemon Grove
National City	National City
Poway	Poway
Ramona	Ramona
Rancho Santa Fe	Rancho Santa Fe
San Marcos	San Marcos
Solana Beach	Solana Beach
Spring Valley	Spring Valley
Valley Center	Valley Center
Vista	Vista



Del Mar Beach



# Global destinations’ readiness for sustainable tourism

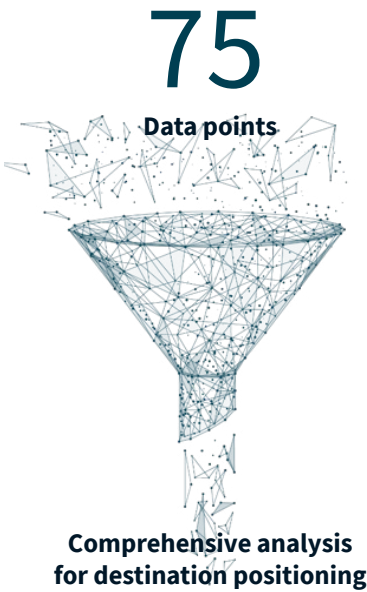
- Tourism readiness index is the product of a partnership between JLL and the World Travel & Tourism Council to assess global cities’ tourism readiness.
- While readiness will depend on the ambitions and goals of every city, WTTC & JLL define tourism readiness as a strategic and all-inclusive approach that proactively addresses and implements factors and policies relating to scale, concentration, leisure and business offerings, environmental and urban readiness, safety and security, as well as the prioritization of tourism.
- Indeed, no two destinations are better than one another or the same and, as such, the challenges they will face and the opportunities to unlock their tourism potential, will differ.
- However, commonalities can be identified to provide a framework through which cities can assess their context and plan for the future.

## Tourism readiness index

- Comprehensive analysis addresses what makes a destination ready for sustainable travel and tourism.
- Assess current positioning and ability to manage growth
- Indicators | 75 data points across all facets of the tourism economy
- Outcomes | eight categories and five destination typologies



Globally recognized tool validated by over 100 domestic and international destinations and the World Travel & Tourism Council



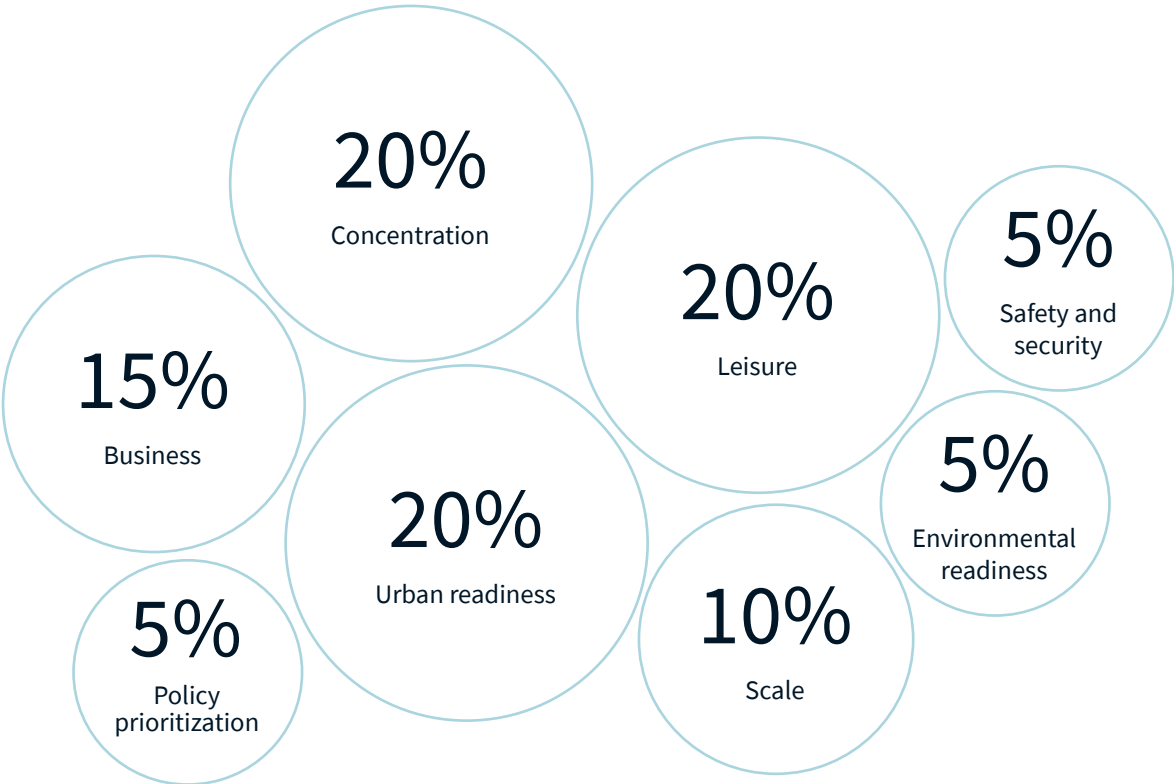
### Tourism readiness index categories

- |                            |                          |
|----------------------------|--------------------------|
| 1. Scale                   | 5. Concentration         |
| 2. Leisure                 | 6. Business              |
| 3. Environmental readiness | 7. Urban readiness       |
| 4. Safety and security     | 8. Policy prioritization |

Levels of readiness | Destination typologies

Dawning Developers	Emerging Performers	Balanced Dynamics	Mature Performers	Managing Momentum
Limited tourism infrastructure	Growing momentum	Established infrastructure	Strong leisure and/or business travel dynamics	Historically high growth momentum
Gradual tourism growth	Rising infrastructure	Growth in business and leisure paces with scale	Established tourism infrastructure	Aging or strained tourism infrastructure
Opportunities ahead with planning	Opportunities for strategic development	Equalized scale and concentration	Proactively manage pressures and capacity building	Feeling the pressures of scale and concentration
	Smaller scale — may experience pressures			

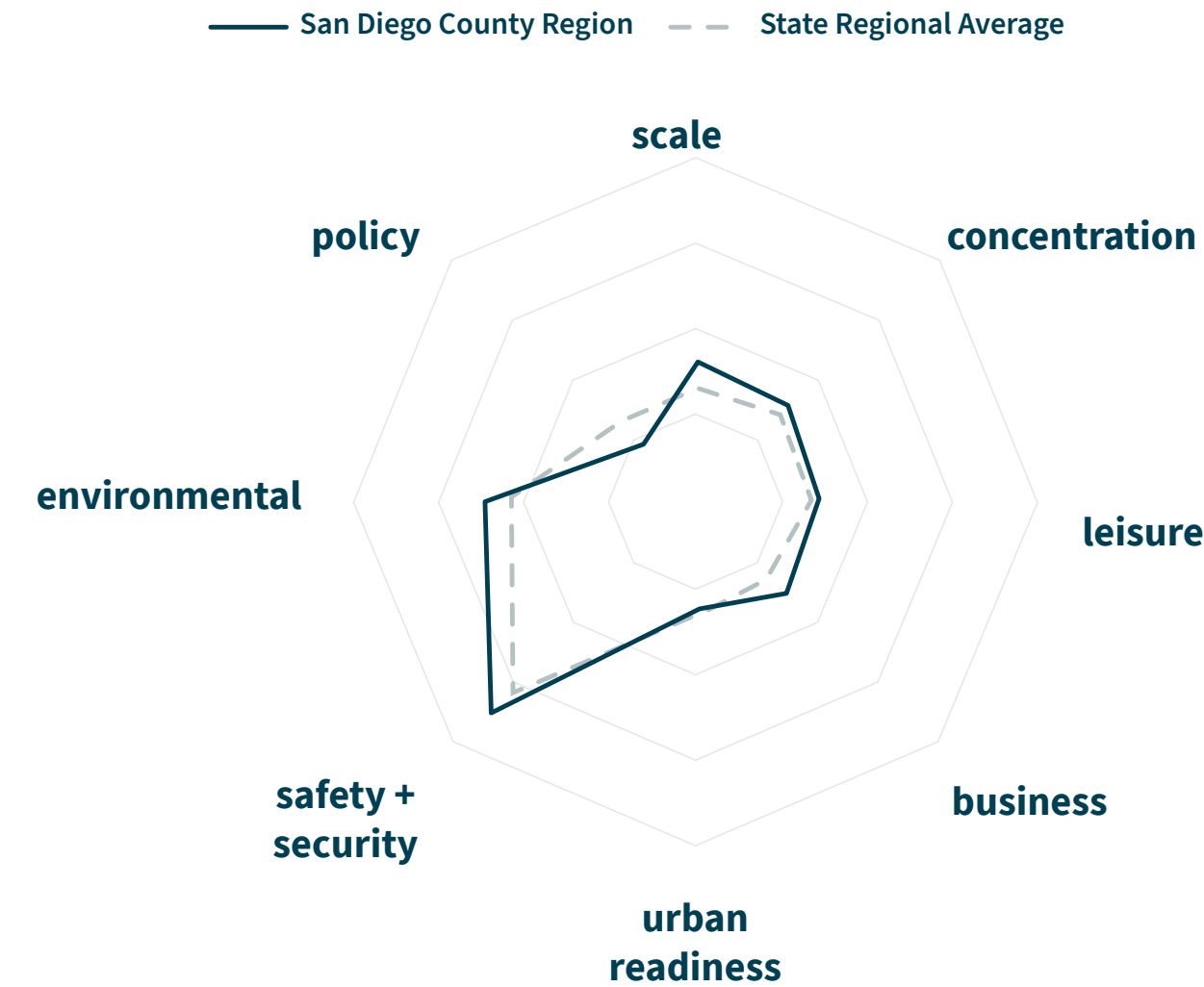
Weights by category





# San Diego results

## Outcome by pillar



# Demand driver scorecard

## Process — multistep assessment of destination assets



Utilize visitor traffic and flow data to assess current demand



Place individual assets on scale based on eight criteria to score



Rate anything that is a 6-7 or greater as the region’s attractors



Utilize the outcome to identify future competitive positioning



Recommend new investment or enhancement to grow assets on the scale

## Score card elements

Item	Definition	Max point value
One of a kind	Captivating content or collections that drives interest and appeal Proximity of alternative similar offerings can be a factor in overall uniqueness	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy — trying to capture a moment)	20
Engaging visitor experience	Interaction between the guest and the attraction	15
Current visitor demand	Level of visitor traffic, reviews, etc., to the asset currently	15
Event opportunities	Programming temporal, catalytic events	10
Venue capabilities	Easily transformed and adapted to host various functions	5
Identified target audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5
Future unique development	Upcoming additions or plan initiatives that elevate potential	5



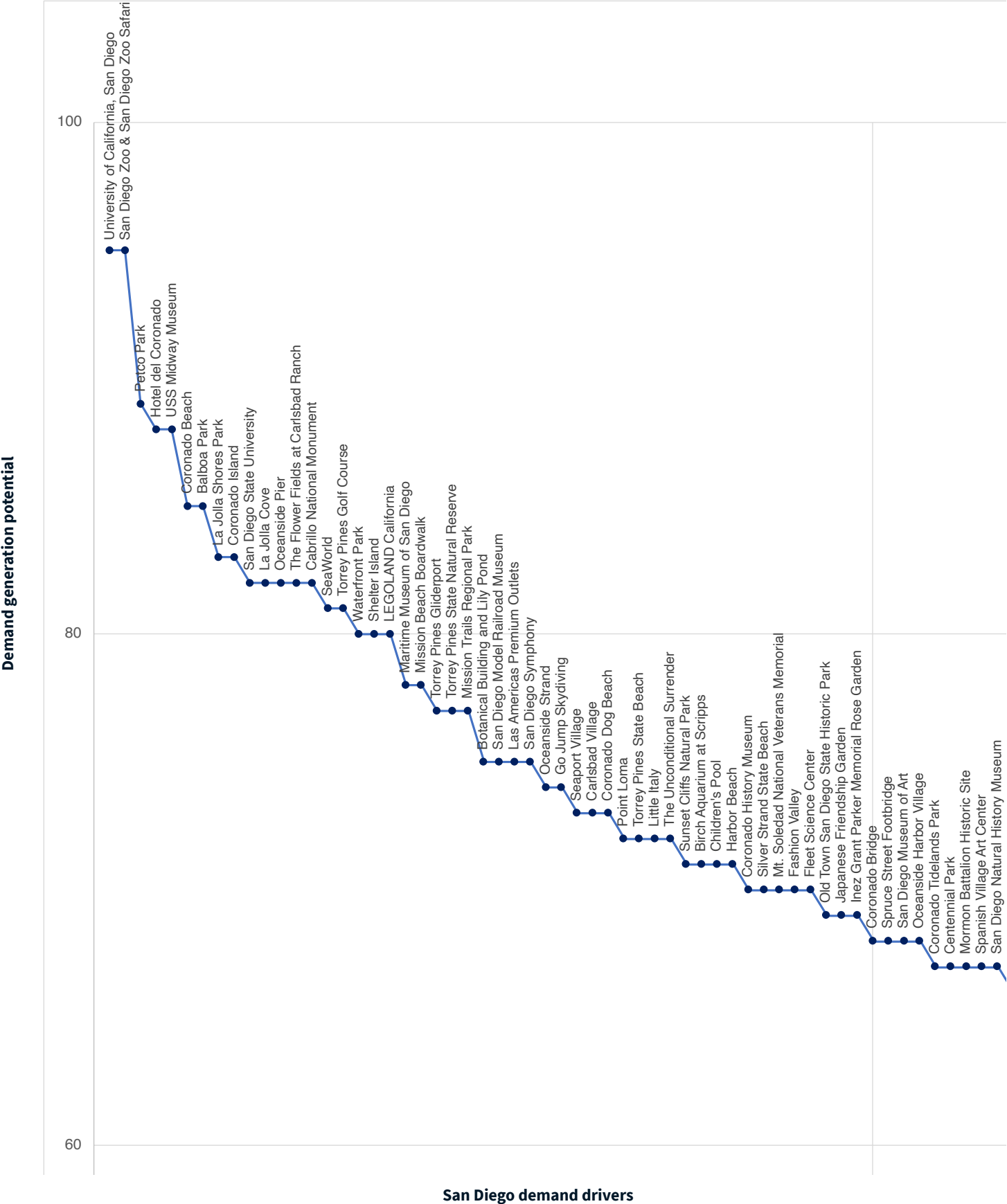
Score Card: Eiffel Tower sample scoring

Item	Definition	Score	Max point value
One of a kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	25	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy — trying to capture a moment)	20	20
Engaging visitor experience	Interaction between the guest and the attraction	15	15
Current visitor demand	Level of visitor traffic, reviews, etc., to the asset currently	15	15
Event opportunities	Programming temporal, catalytic events	10	10
Venue capabilities	Easily transformed and adapted to host various functions	5	5
Identified target audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5	5
Future unique development	Upcoming additions or plan initiatives that elevate potential	5	5



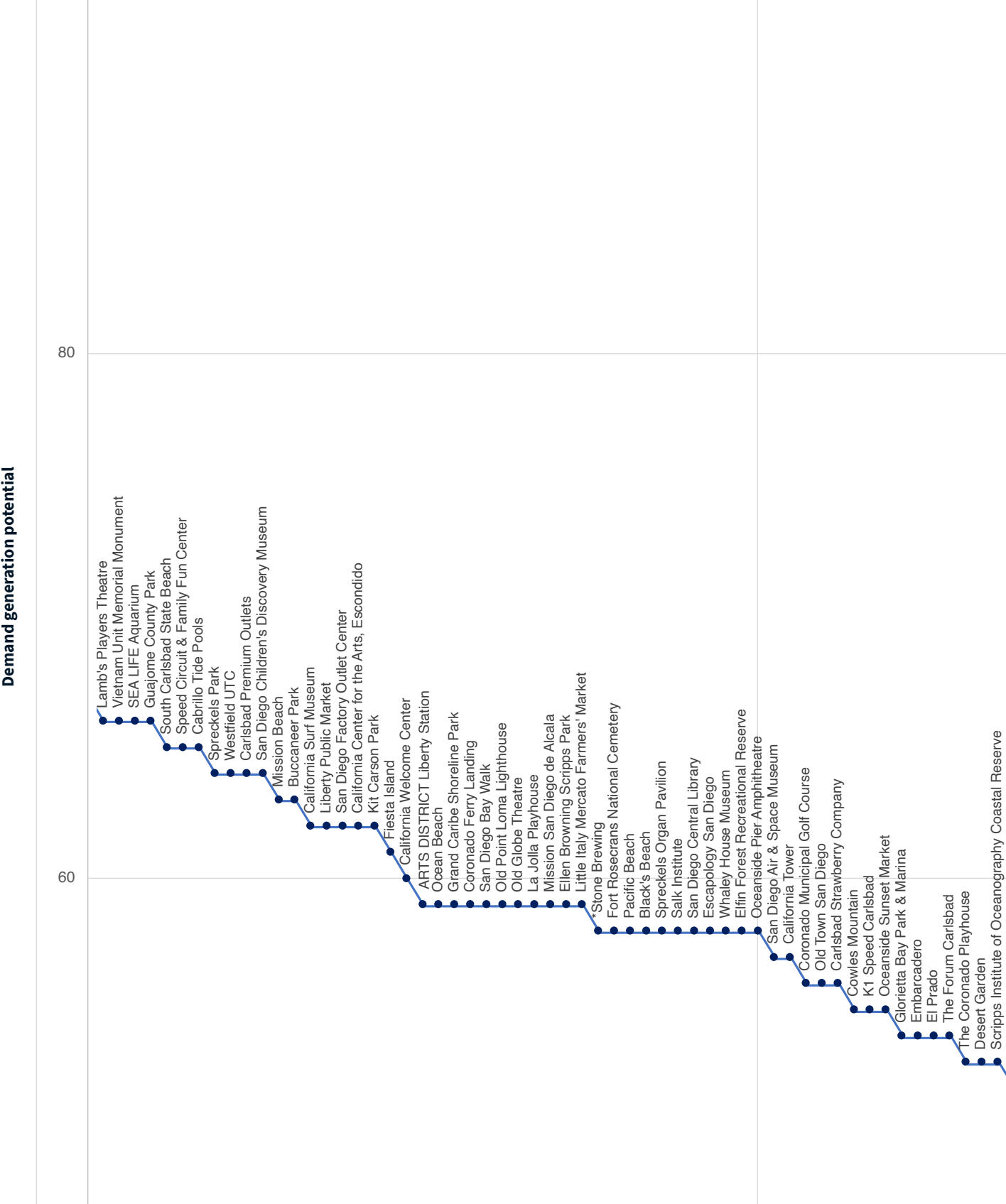
Waterfront Park Fountains, San Diego

San Diego demand drivers



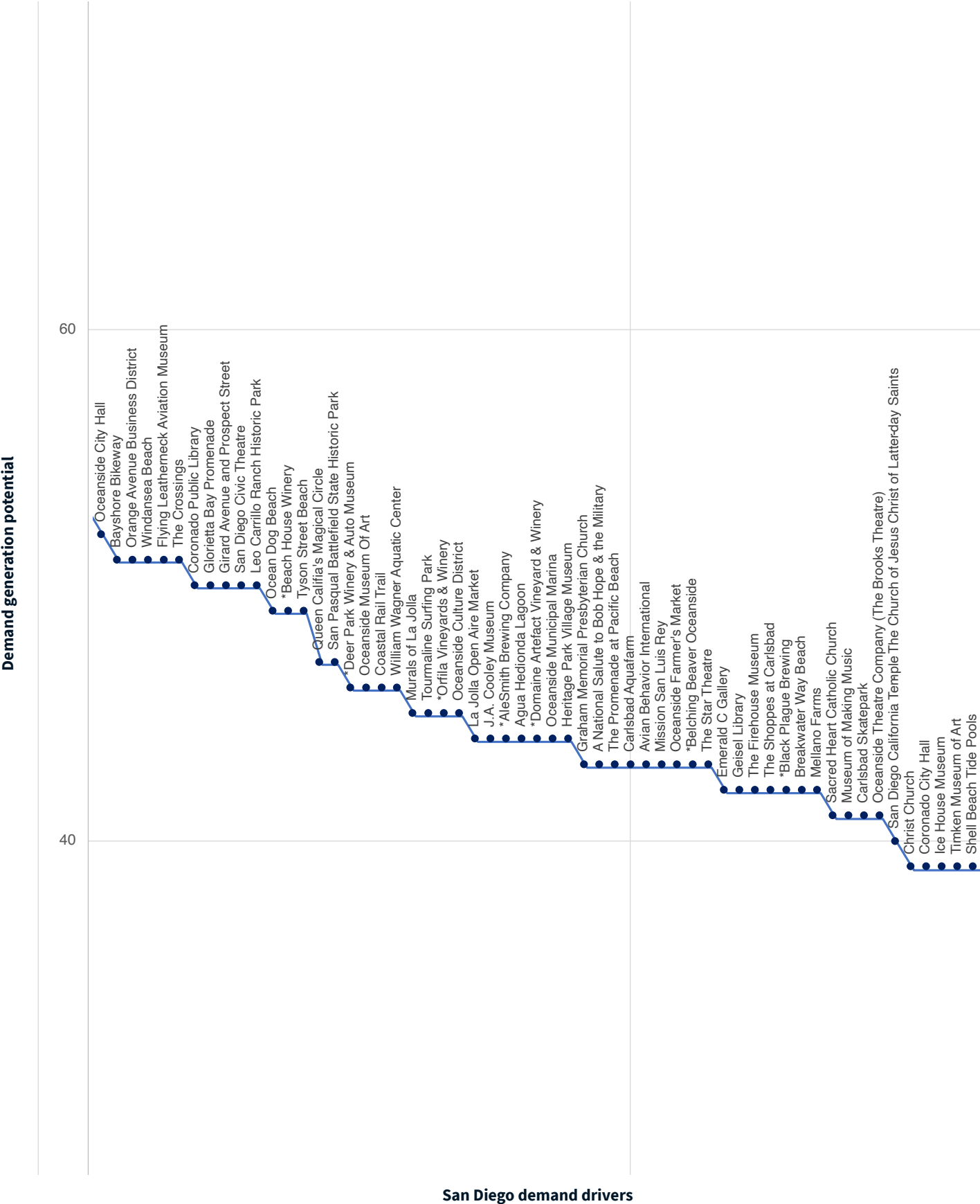


San Diego demand drivers



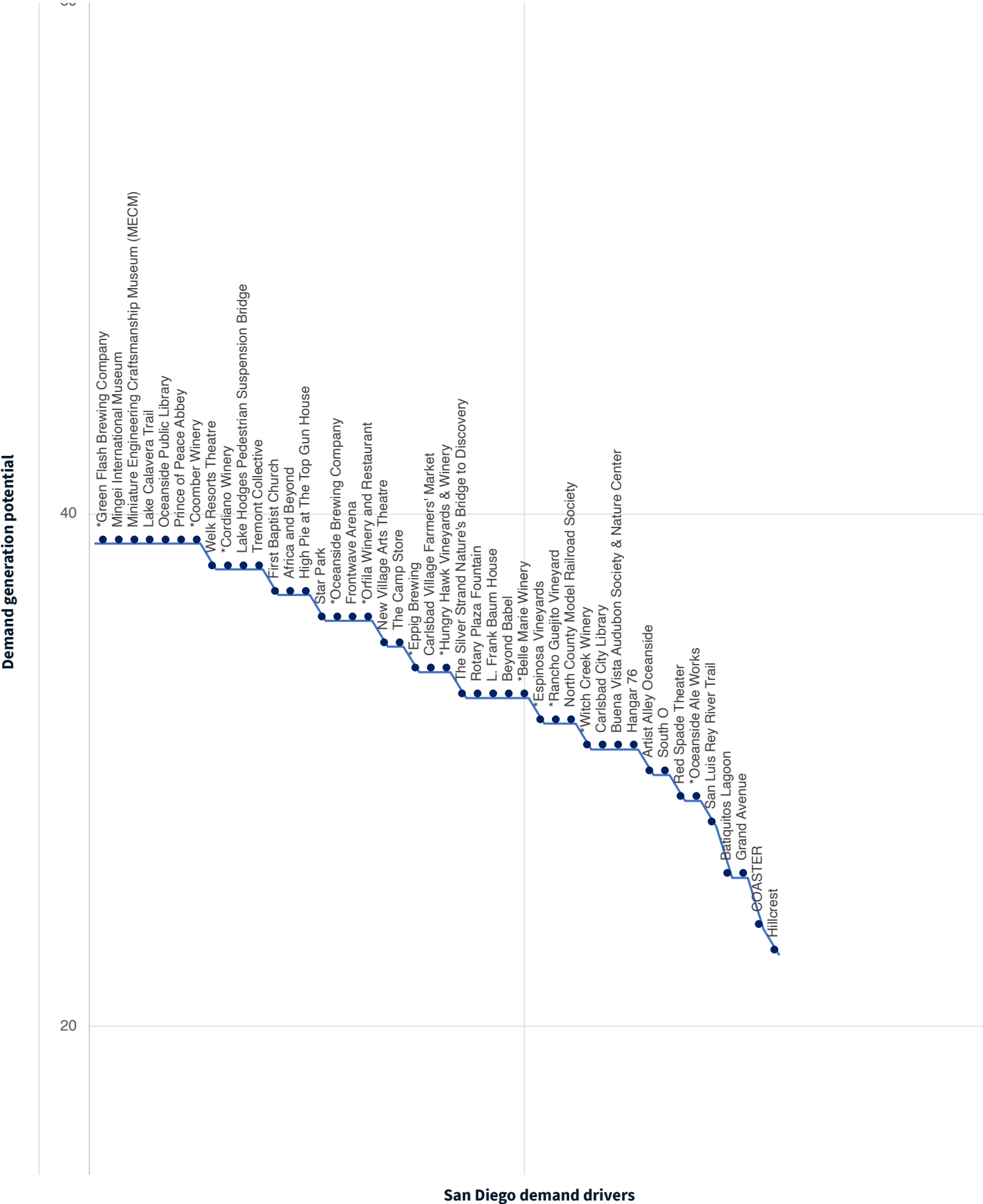
San Diego demand drivers

San Diego demand drivers





San Diego demand drivers



# Event matrix

Purpose — Use criteria that drives event return to understand the current landscape of successful events and position the region to support up and coming events.



Identify key events serviced by the region



Rate events on matrix using 11 criteria



Identify those events that can grow in specific areas through matrix outcomes



Work with organizers on tactics for implementation

## Program components

- Tourism promotion — destination impact
- Benefit to the destination brand
- Innovation — uniqueness
- Evidence of partnerships
- Organizational structure and management capability
- Economic impact (direct spending)
- Suitable target market(s)
- Comprehensive marketing plan/approach
- Overnight stays (room nights)
- Scale of project — future potential
- Time of year — need periods

## Multi-day event

Each event is scored as a single instance, regardless of duration. The evaluation, across the 10 criteria, considers the event’s overall impact and attendance. Instead of daily attendance, the Event Matrix uses criteria such as total overnight stays and the suitability of the event’s target markets. The approach to determining overnight stays involves a two-stage analysis. The first stage uses methods tailored to each event’s reporting sophistication, including reviewing event websites (for past statistics and future room block numbers), reported attendance on Destination Marketing Organization (DMO) websites, and public articles for high-profile events. In the second stage, DMO representatives and regional advisory committees qualitatively review these findings to provide feedback and revisions, validating the scoring process.

## Risk

The Event Matrix tool does not directly incorporate event-related risks into final scores, as these considerations are outside its scope. However, stakeholder-identified regional risks, including public safety challenges and high liability insurance premiums due to climate-related risks have been addressed in regional plans and discussions.



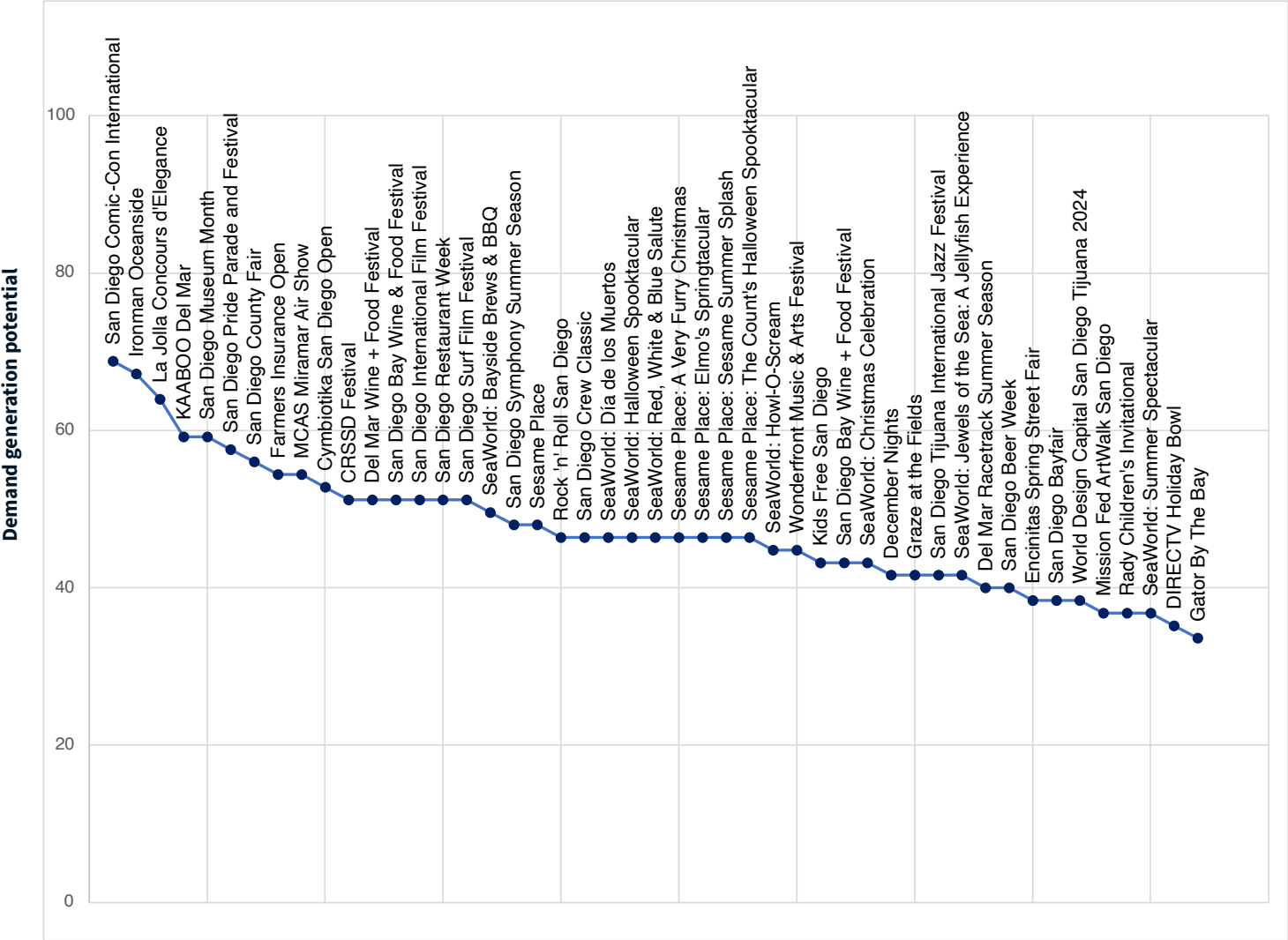
Oceanside

**Program components**

	<b>Fail</b>	<b>Poor</b>	<b>Average</b>	<b>Above average</b>	<b>Excellent</b>	<b>Total points awarded</b>
Program components						10
1. Tourism promotion – destination impact						10
2. Benefit to the destination brand						10
3. Innovation - uniqueness						10
4. Evidence of partnerships						10
5. Organizational structure and management capability						10
6. Economic impact (direct spending)						10
7. Suitable target market(s)						10
8. Comprehensive marketing plan/ approach						10
9. Overnight stays (room nights)						10
10. Scale of project – future potential						10
+Bonus — need periods/time of the year						
Total Maximum possible points = 100						<b>100</b>



San Diego leisure events



San Diego region leisure events

