



SAN DIEGO TOURISM AUTHORITY
BRAND BRIEF
2017



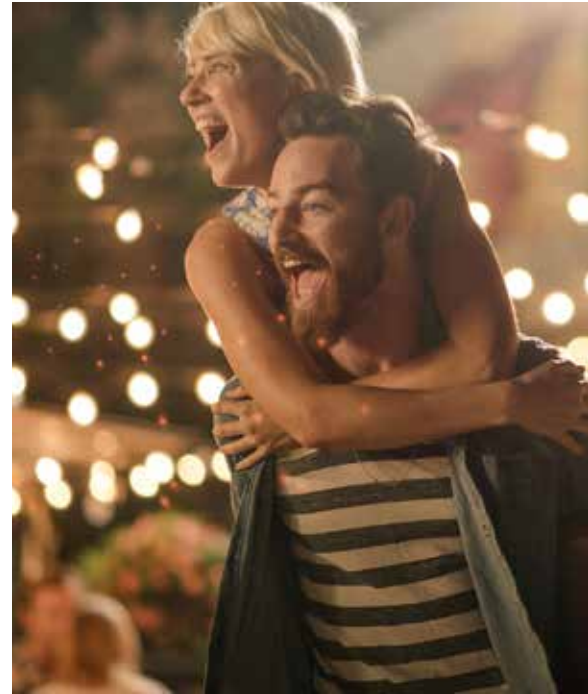
THE SAN DIEGO BRAND

In a world of too many product choices, it is critical to create brands that are memorable and relevant. A strong brand resonates with buyers on an emotional level and creates greater demand. Great brands attract buzz and marketing alliances, making limited dollars work harder in the marketplace. For San Diego, our destination brand is our greatest marketing asset.

In 2014, the SDTA embarked on new global brand research with partners SMARI, Smith & Company and MeringCarson. Over 5,000 past and prospective travelers from seven countries (United States, United Kingdom, Canada, Mexico, Japan, Germany and China) were surveyed about San Diego attitudes and perceptions, barriers, product offerings and messaging. The findings reinforced years of prior learning about the San Diego brand and provided new insights into international market challenges.

To summarize:

- In the United States, San Diego is seen as a highly desirable destination—second only to Hawaii in terms of aspirational appeal.
- Internationally, San Diego isn't well known, and it is difficult to compete against a number of iconic "must-see" destinations.
- Across all the markets surveyed, our climate and relaxation are key image drivers for San Diego.
- Every market is somewhat different and should be looked at individually in order for San Diego to best capitalize on opportunities:
 - Close-in markets such as Los Angeles and Phoenix are very familiar with San Diego and need only to hear about what's new in the destination to stimulate interest to travel.
 - Further-out markets such as Chicago and New York know San Diego only at a superficial level (weather) and need awareness plus education to build consideration to visit.
 - Japan and China are more likely to consider Hawaii, whereas the U.K. and Germany are more likely to consider New York.
 - Mexico is a key opportunity market due to high consideration compared to other markets.
- Consideration for San Diego grows significantly after seeing photos and descriptions of the destination's diverse amenities.
- San Diego's diverse economic sectors and business culture aren't yet well known. San Diego is seen as a desirable destination for business travel due to the destination's beauty and lifestyle.



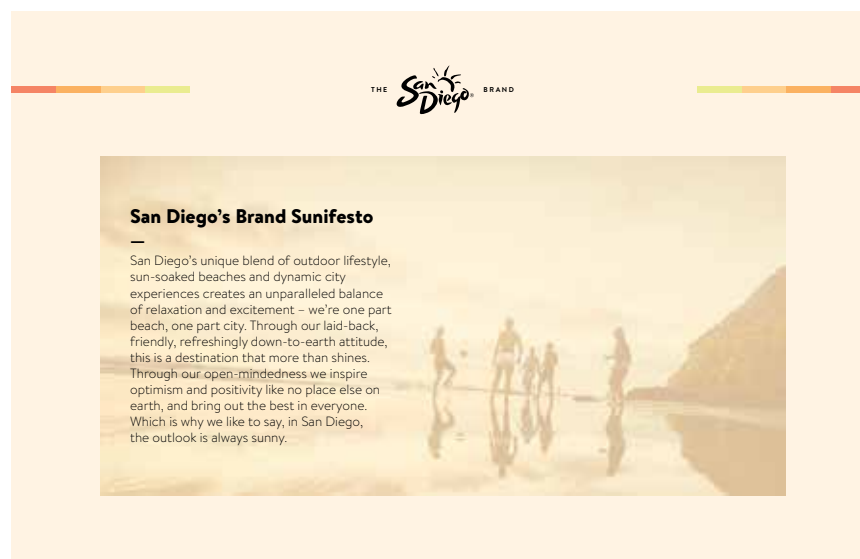
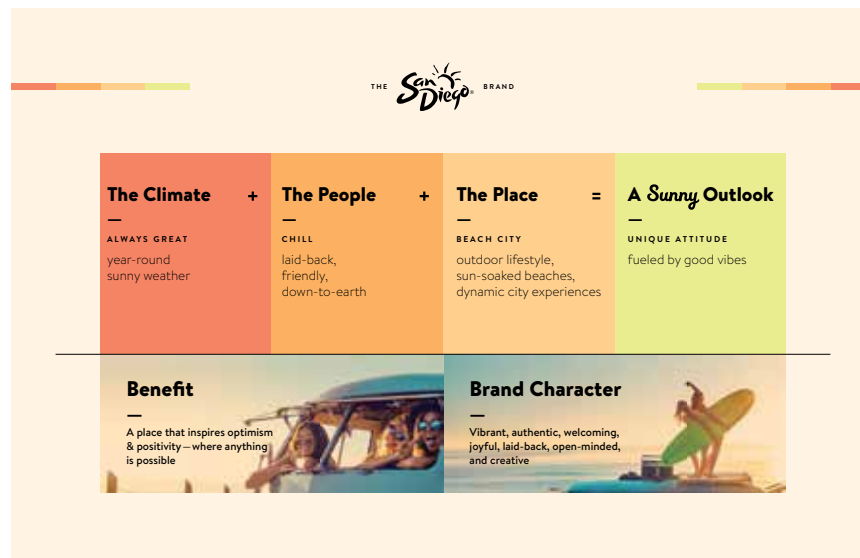


THE SAN DIEGO BRAND

THE BRAND PLATFORM

In 2014, the San Diego Tourism Authority completed an extensive global research project that explored a variety of measures across domestic and global markets to determine brand position, commonalities, differentiators and motivators by country and region. More than 5,000 travelers throughout seven countries were surveyed and focus groups were conducted in four domestic spot markets. The findings reinforced years of prior learning and ultimately re-confirmed that San Diego's Sunny Outlook brand platform was solid and differentiating.

The San Diego brand is built on a foundation of inspired optimism and positivity. Our unique blend of great weather, friendly people, and our laid-back yet vibrant beach city experiences infuse our region with an upbeat, anything's-possible attitude. This blend of **climate + people + place** is what elevates our customers' mood and gives us a unique selling proposition in the marketplace.





THE SAN DIEGO BRAND

MAKING OUR ICONS - STORYTELLING FROM THE INSIDE OUT

As destination marketers, we focus our time and resources on external audiences. Our goal is to get people to visit San Diego. We want them to get to know the destination, consider it, like it and share their experiences with others.

In the eyes of travelers, San Diego has a strong, competitive image*. Sandwiched between Hawaii and Las Vegas for many types of trips, San Diego offers elements of both popular destinations – a place as enjoyable as Hawaii and with recreational variety as good as Las Vegas.

The diversity of San Diego's visitor experience is what sets it apart. While not the top rated destination in any category measured, San Diego blends the best of most worlds. Travelers have described San Diego as the best of California all in one place.

San Diego gets high marks for:

- Outdoor activities and beauty, but not as strong as Hawaii or the Caribbean
- Family-oriented activities, but not as strong as Florida or Hawaii
- Urban features like diverse neighborhoods, a vibrant urban center and great nightlife but not as strong as San Francisco or Los Angeles
- Craft beer, behind only San Francisco





THE SAN DIEGO BRAND

MAKING OUR ICONS - STORYTELLING FROM THE INSIDE OUT

As one of the most popular travel destinations in the country, San Diego and its visitor experience is often recognized by media and trusted influencers. San Diego gets credit for a variety of experiences, from the more expected beach and lifestyle accolades to recognition for its hip, urban offerings.

Sunset



Best Place to "Hatch Big Ideas"



A "Best of the World" Destination

cvent



A Top 5 Meeting Destination

YAHOO!
TRAVEL



"#1 Buzziest Beach Town"

TRAVEL+
LEISURE



"#2 Athletic & Active City"

TRAVEL+
LEISURE



One of "America's Best Cities for Foodies"

Forbes



One of "America's Coolest Cities"

Condé Nast
Traveler



One of "America's Best Beer Cities"



THE SAN DIEGO BRAND

MAKING OUR ICONS - STORYTELLING FROM THE INSIDE OUT

Aside from San Diego's many strengths, the destination lacks an icon that makes it a "must see" destination for travelers. Visual icons help create a distinct image of a place and the lack thereof means San Diego can get overlooked in the consideration process – particularly in more distant markets where there is less familiarity.



Without a strong visual icon, visitors from more distant markets are less motivated to choose San Diego over other California options.



THE SAN DIEGO BRAND

MAKING OUR ICONS - STORYTELLING FROM THE INSIDE OUT (CON'T)

As San Diego's tourism industry partners at the state and national level continue to strategically focus on icons in their global marketing programs, San Diego must develop ways to fit into their storytelling. San Diego must consistently communicate what makes it unique – essentially making our icons through cohesive storytelling as a community.



Brand USA's "Bridge" strategy builds upon iconic destinations while introducing new/undiscovered experiences.



Disneyland, Hollywood, beaches Yosemite and Napa Wineries are among the top motivating attractions in California (Hall & Partners)



THE SAN DIEGO BRAND

MAKING OUR ICONS - STORYTELLING FROM THE INSIDE OUT (CON'T)

San Diego Tourism Authority has developed out assets to help internal teams and external partners properly position the product and experiences that are unique to San Diego.

ICON ELEVATOR SPEECHES

- **Cali-Baja** cuisine is San Diego's distinct food culture that comes from open collaboration between chefs on both sides of the border. It combines the creativity and freshness emphasized in Californian cooking with the Baja-Mediterranean movement found in Mexico's culinary scene.
- San Diego is the **Craft Beer Capital of America**. It's the nation's leading craft beer destination with more than 150 breweries, and has defined the popular West Coast-style IPA.
- San Diego is the **sweet spot for golf**, with more than 90 courses, including the internationally renowned Torrey Pines Golf Course, and more playable days than anywhere else in the United States.
- Downtown **San Diego's Gaslamp Quarter** is one of the hottest nightlife destinations on the West Coast. This historic district, featuring both Victorian-era buildings and modern high-rises, includes 16-walkable city blocks with 180 restaurants, 50 bars and 10 nightclubs.
- **San Diego is the birthplace of California**. It's home to the Cabrillo National Monument, a national park which commemorates the historic 1542 landing of Juan Rodriguez Cabrillo, who was the first European explorer to set foot on the U.S. West Coast.
- **Balboa Park is the largest urban cultural park in the United States**, a 1,200-acre oasis that hosts 17 museums, beautiful gardens, theaters and the world-famous San Diego Zoo. Its iconic California Tower exemplifies the park's Spanish Colonial Revival architecture and is one of the most recognizable structures in San Diego.
- **Torrey Pines State Natural Reserve**, set atop dramatic ocean cliffs above the Pacific, is a coastal wilderness of natural vegetation and sandstone canyons full of walking trails and breathtaking views. It's one of only two locations in the world that grows the Torrey pine tree.
- **Mission Bay Aquatic Park** is the largest manmade aquatic park of its kind in the world. The 4,600-acre outdoor playground features recreation on and off the water, from sailing and jet skiing to bike riding and triathlons.





THE SAN DIEGO BRAND

SAN DIEGO FAST FACTS

- 8th largest city in the U.S. and 2nd largest in California
- 70 miles of coastline
- 33 beaches
- 267 mostly sunny days per year
- More than 100 diverse neighborhoods
- 93 public + private golf courses
- More than 150 craft breweries
- San Diego County has more biodiversity than any other county in North America
- San Diego County has more small farms than any other county nationally
- 18 state parks and 1 federal park
 - o Anza-Borrego Desert State Park is California's largest state park and the largest desert park in the U.S.
 - o Old Town San Diego State Park is the landmark of the first Spanish settlement of the U.S. West Coast
 - o Cabrillo National Monument, a National Park which commemorates the historic 1542 landing of Juan Rodriguez Cabrillo, who was the first European explorer to set foot on the U.S. West Coast.
- Mission Basilica San Diego de Alcalá was the first mission built in California
- Birthplace of the triathlon
- Home to the largest sport fishing fleet in America
- Home to the USS Midway; the longest-serving U.S. Navy aircraft carrier of the 20th century, now a floating museum
- With Tony Award® winning theatres, La Jolla Playhouse and The Old Globe, San Diego is a leading theater producing town with numerous San Diego productions making their way to Broadway
- Chicano Park, a National Historic Landmark, is home the largest collection of outdoor murals in the U.S. and the largest collection of Chicano murals in the world
- Home to the busiest international border crossing in the Western Hemisphere



THE SAN DIEGO BRAND

PROFILE OF SAN DIEGO

San Diego is the 8th largest city and 17th largest metropolitan area in the U.S. San Diego's population skews young, with a median age of 35.3 years and the largest millennial population (age 18-34) among major metropolitan areas nationwide. With the 5th highest foreign born population (23.2% of residents), San Diego is one of the most ethnically and culturally diverse places in the nation along with Miami, Los Angeles, San Francisco and New York. More than 100 languages are spoken by San Diego residents, and 22.3% are multi-lingual non-native English speakers who also speak English very well.

RANKING OF SAN DIEGO FOR DEMOGRAPHIC + QUALITY OF LIFE

SAN DIEGO RANK	TITLE	MEASURE %/RATE/GDP/VALUE/##/\$
17	25 Largest US Metros by Population (2014)	3,263,432 People
5	Median Age (2014)	35.3 Years of Age
1	Percentage of Residents 18-34 Years Old (2014)	25.4%
5	Foreign-Born Populations (2014)	23.3%
9	Median Household Income (2014)	\$66,192
10	Per Capita Income (2013)	\$51,384
2	Median Home Price (Q2 2015)	\$547,800
1	Mean Travel Time to Work (Minutes) (2014)	25.0 Minutes
4	Total Annual Sunshine Hours (1961-1990 Average)	3,055 Hours

Source: San Diego Regional EDC (<http://www.sandiegobusiness.org/industry>)



THE SAN DIEGO BRAND

BUSINESS IDENTITY

In order to compete globally, San Diego's destination identity must successfully engage the leisure and business sectors. While San Diego is one of the most preferred leisure vacation destinations in the country, meeting planner research shows that a destination's business identity is also important in the decision to bring a meeting or convention to a city¹.

While home to the largest concentration of military in the world, San Diego's innovation economy is anchored by life sciences, communications, cleantech and software industries. With a highly educated workforce, San Diego is recognized globally as a center of scientific breakthroughs and discoveries making it one of the top life sciences markets in the world. A leading high-tech hub in the country, San Diego also ranks first in the nation in patent intensity (patents per thousand employees), granting 3.6 patents per thousand employees in 2013, more than other high-tech regions, including Boston, Austin, Seattle and New York.

TALENT & ECONOMIC

SAN DIEGO RANK	TITLE	MEASURE %/RATE/GDP/VALUE/#/\$
9	% Population w/Bachelor's or Higher (2014) Ages 25+	37.1%
10	% Population w/ Master's/Professional or Higher (2014) Ages 25+	13.8%
4	% Population w/Doctorate (2014) Ages 25+	2.1%
4	Percentage of Degree Holder's (Bachelor's+) whose first degree was in Science, EGINEERING or Engineering-related Field (2014)	39.6%
6	Multi-Lingual (Non-Native English Speakers who also Speak English "Very Well") Residents Age 5+ (2014)	22.3%
13	Unemployment Rate (November 2015)	4.8
16	Gross Domestic Product (2014) (millions of current dollars)	\$206,817
16	Total Export Value (2014)(current dollars)	\$18,585,667,916
2	Patents per 1,000 Workers (2013)	3.65
11	Total VC Dollars Received (2014) (current dollars)	\$805,077,600

Source: San Diego Regional EDC (<http://www.sandiegobusiness.org/industry>)

¹2013 DestinationMap Study, STR, Inc.



THE SAN DIEGO BRAND

SNAPSHOT OF KEY INDUSTRIES - (SOURCE: SAN DIEGO REGIONAL ECONOMIC DEVELOPMENT CORPORATION)

Tourism

Tourism is San Diego's third largest industry and second largest traded economy (behind Research/Technology/Innovation), employing over 183,000 San Diegans (13% of the jobs in the county). In 2016, 34.6 million visitors are projected to have spent \$10.3 billion at San Diego businesses generating more than \$705 million in total tax revenues for state and local governments. The visitor industry delivers more than \$17.1 billion in regional economic impact.

Life Sciences

San Diego is one of the top life sciences markets in the world with more than 1,100 life sciences companies and 80 research institutes. Life sciences activity accounts for more than \$31.8 billion in total economic impact to the region. Venture capital investment in life sciences totaled more than \$550 million in 2014 with Biotechnology receiving more than any other industry.

Cleantech

San Diego is the most concentrated major metropolitan region for cleantech employment in the U.S. The 800 cleantech companies support 25,000 jobs in the sector, the third highest in the state. Clean energy has been named as a top five field prime for job growth in San Diego.

Information & Communications Technologies

The largest employment cluster in San Diego's innovation economy is the Information & Communications Technologies cluster, with 3,290 companies supporting 67,000 jobs. In 2014, the ICT section accounted for 75% of innovations startups and 22% of total venture capital activity in San Diego.

Healthcare

San Diego's healthcare industry employs more than 140,000 people. San Diego hospitals hold some of the highest ratings by national publications, such as U.S. News and World Report, for both overall care and unique specialties. The industry is one of the fastest growing and one of the largest employers in the region.

Cybersecurity

The total economic impact of the cybersecurity industry was \$1.9 billion in 2015. With more than 7,620 people currently employed by cybersecurity firms, employment projected to growth 13% over the next 12 months.



THE SAN DIEGO BRAND

SNAPSHOT OF KEY INDUSTRIES (CON'T)

Aerospace

The aerospace, navigation, and maritime technologies cluster employs more than 33,000 people in the region. Aerospace employment in San Diego County has grown by 66.7 percent since 2004. Home to the two largest military unmanned aerial vehicle (UAV) manufacturers, Northrop Grumman and General Atomics, San Diego is a hub for UAV technologies for both military and civilian users.

Defense

Home to the largest concentration of military in the world and largest federal military workforce in the U.S., San Diego's military sector is responsible for approximately 22% of all jobs in the county (328,000). Defense-related activities and spending generated an estimated \$45 billion of gross regional product for the county during fiscal year 2015, amounting to 21.5% of the region's total GRP.

Maritime

With a strong Navy presence and innovative technology firms, San Diego is now a hub for maritime technology. In 2012 46,000 San Diegans were employed in the maritime industry, which was projected to add 6,000 jobs by 2020.

Manufacturing

San Diego is home to more than 3,000 manufacturing companies supporting more than 96,000 jobs accounting for 15% of all paid employment in San Diego. The manufacturing sector contributed nearly \$8 billion in economic impact to the region in 2015.

Sports & Active Lifestyle

San Diego's sports and active lifestyle industry cluster includes more than 1,200 businesses employing 32,407 people. Action sports manufacturing alone directly employs more than 4,300 people. In 2013, the sports and active lifestyle sector delivered a direct economic impact of \$1.35 billion and a total economic impact of \$2.24 billion to the region.

Universities & Research Institutions

Home to world-class academic and research institutions, the San Diego region is recognized globally as a center of scientific breakthroughs and discoveries. San Diego research institutes and universities received a total \$761 million of National Institutes of Health funding for research and development during 2014, ranking 8th among all metropolitan areas. The robust cluster of scientific research and development is one of the largest and most significant economic contributors to the San Diego region, generating \$14.4 billion in gross regional product.