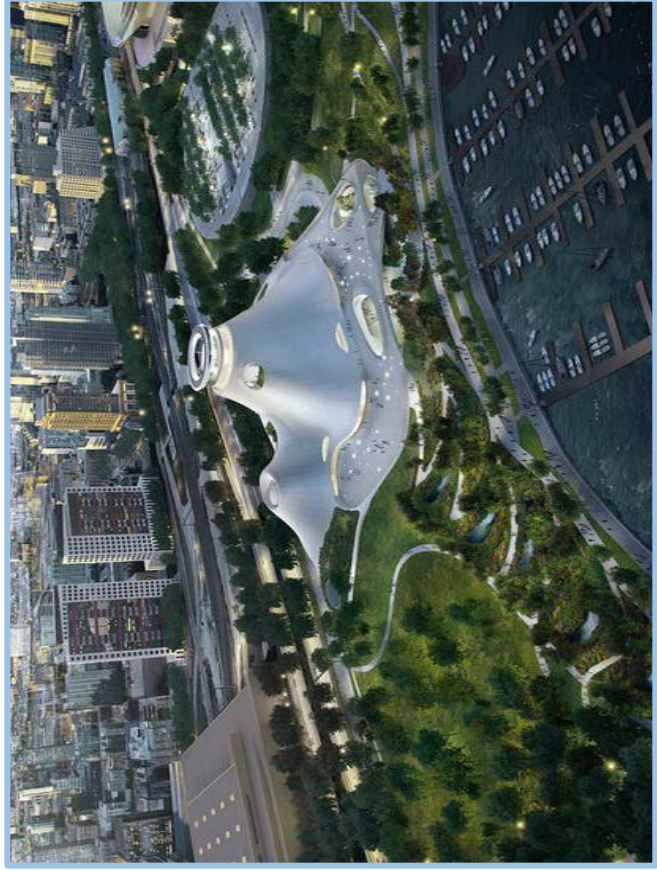
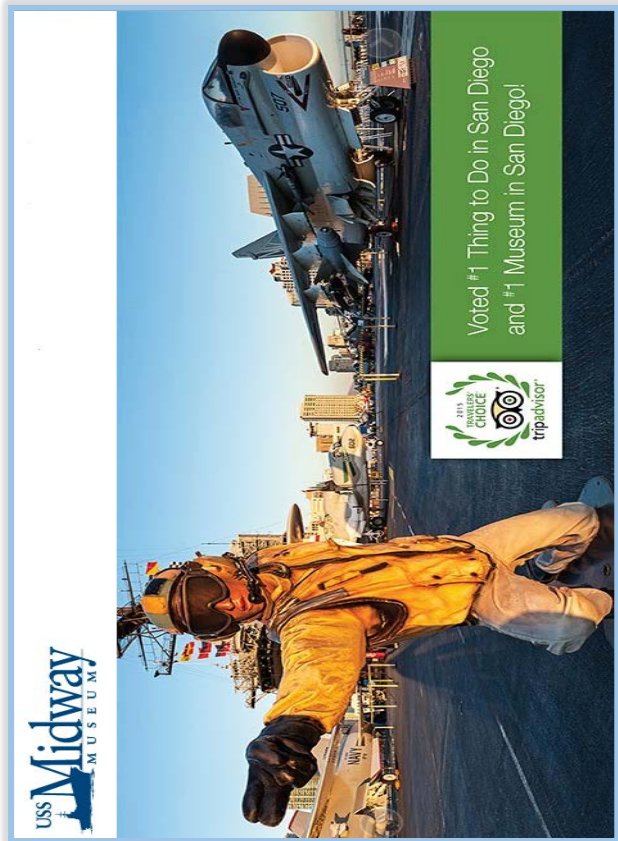




# Attractions @ The Port

# Today's Agenda

- What are Attractions?
- The Importance of Attractions to the District
- Review of key trends from San Diego Tourism data
- Review Attractions Industry benchmarks
- Review of Attractions possibilities for the District
- Board Discussion

# What are Attractions?

A place of interest that people visit, typically for natural or cultural value, historical significance, natural or built beauty, offering leisure, adventure, and or entertainment.

Museums, Aquariums, Theme Parks, Wildlife or Nature Centers, Themed Dining & Entertainment, Symphonies, Concert Venues, Sites of Historic Significance, Heritage Tourism, Parks, and more

....

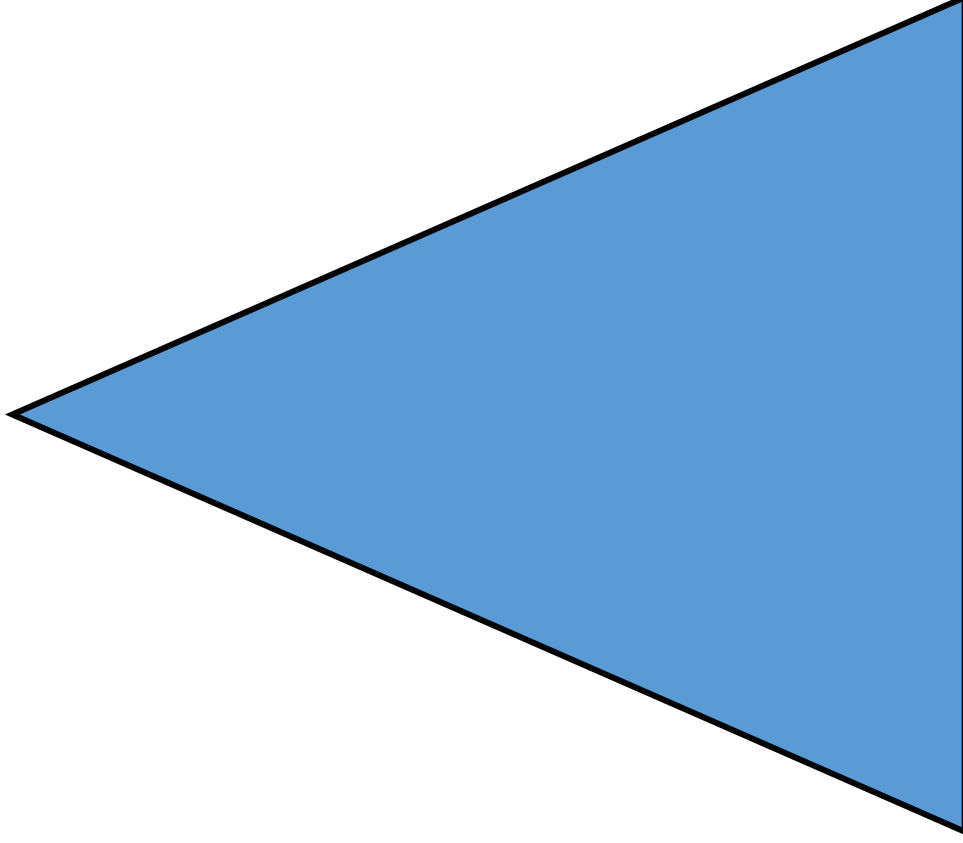
Attractions @ The Port can generate revenues helping us to achieve our purpose:

***Doing The Greatest Good By Doing Remarkably Well***

# Attractions

## The Triangle of Benefits

Urban Landscape



Citizen  
Engagement

Revenue

# Attractions Are Important for The District

## Key Element of Integrated Planning Framework: “Jewels” on The Green Necklace



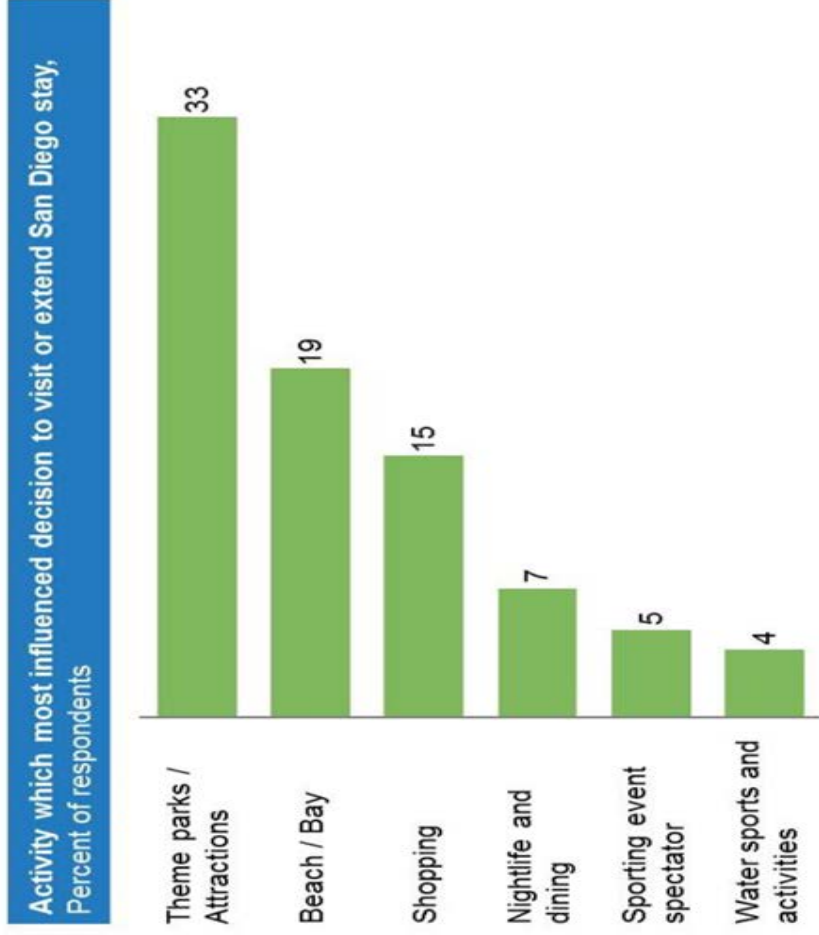
*Entertainment  
District*

*Downtown  
Attractions*

*Regional  
Attractions*

# Attractions Are Important for The Port

## #1 Activity driver for deciding to visit or extend San Diego stay



SOURCE: CIC Research (2013)

# Attractions Are Important for The Port Drives Hotel Revenues



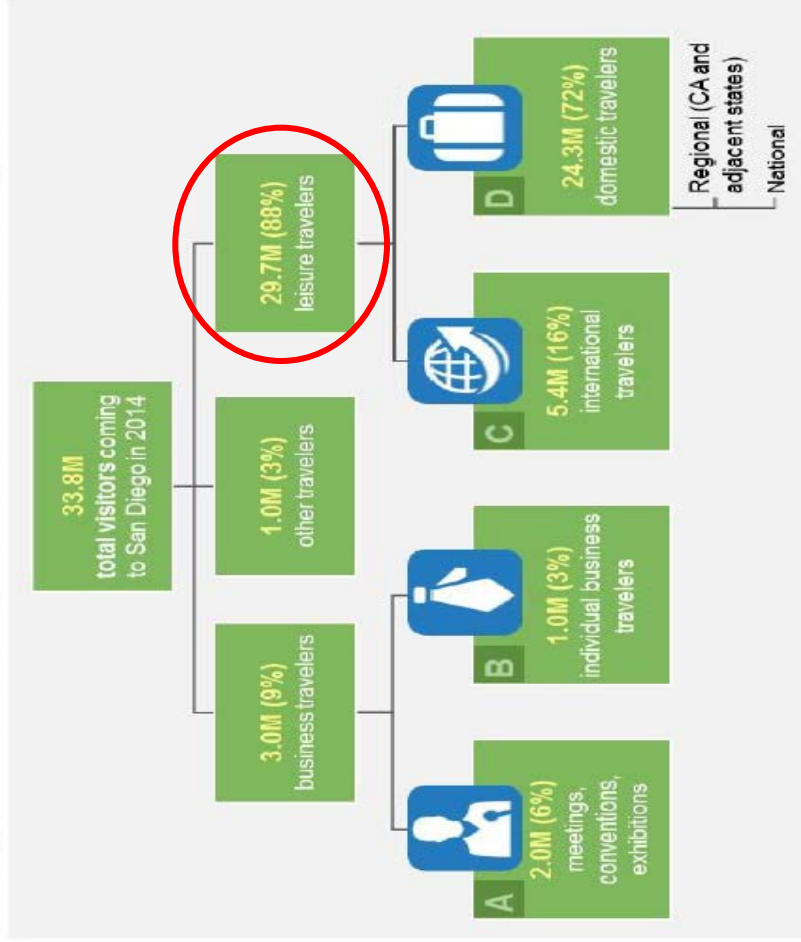
## Carlsbad

**19% Increase in TOT  
(Transient Occupancy  
Tax) with opening of  
Legoland**  
Source: San Diego Tourism Marketing District

**Working to find more  
data  
causation/correlation**

# District Opportunity

San Diego's current visitor profile consists of four distinct segments



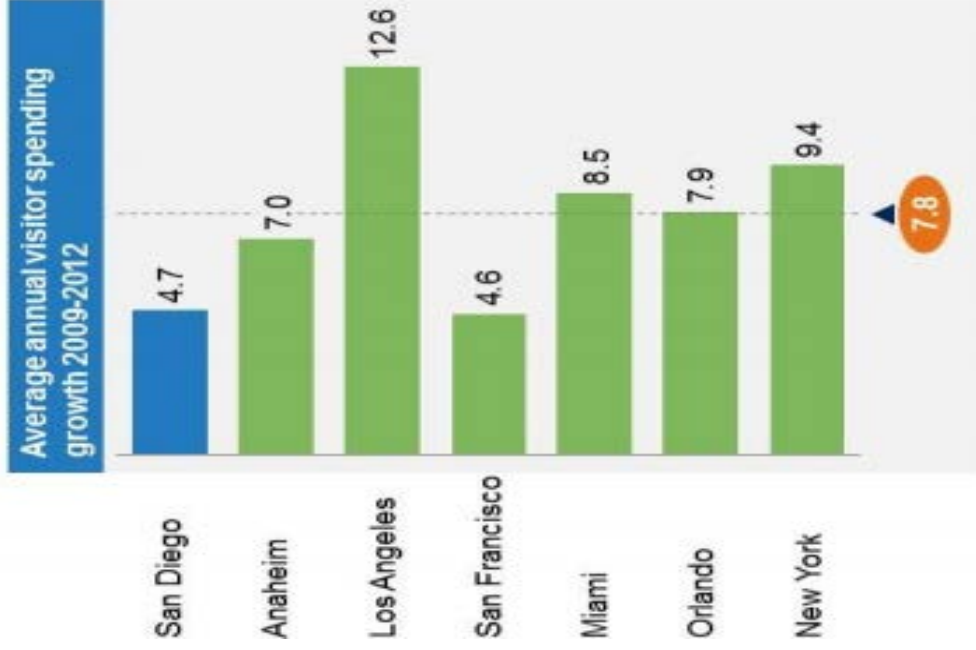
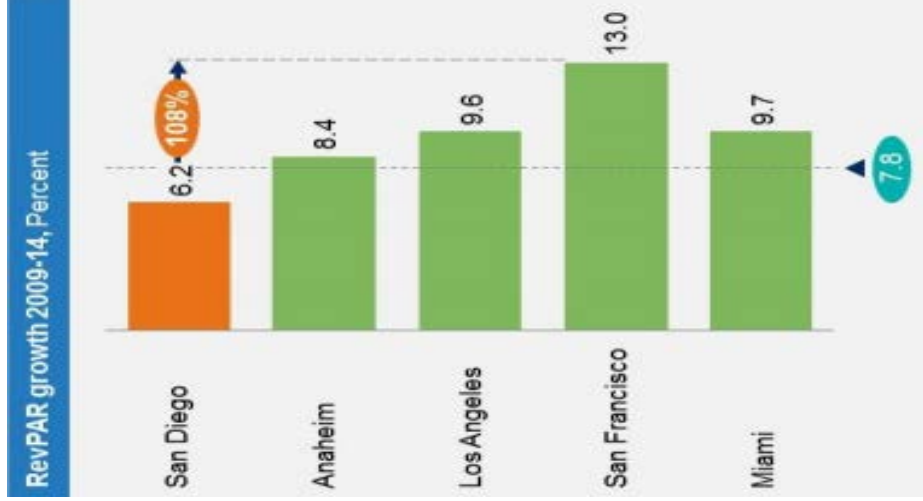
SOURCE: San Diego Tourism Authority, CIC Research (2014)

~34M Visitors in San Diego and 88% of those come for leisure

Spend \$9.9B/Year

# San Diego Tourism Marketing Districts Key Find

## San Diego growth lagging other California cities on key tourism metrics



Source: San Diego Tourism Marketing District, 20 Year Destination Master Plan (Draft), December, 2015



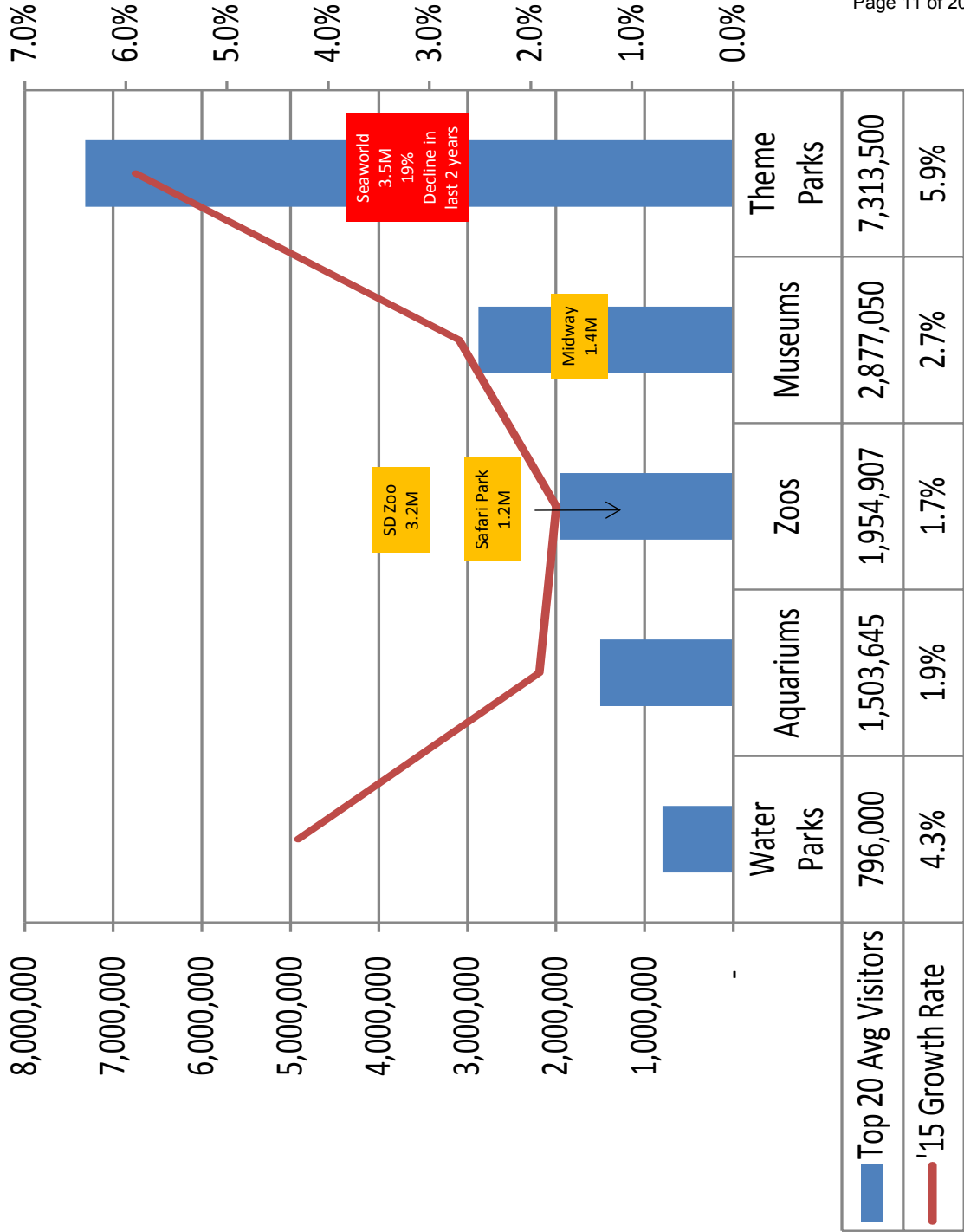
## SD|TMD Draft Master Plan identifies issues and opportunities around 4 themes

- 1. Leisure Asset Development (ie Attractions)
- 2. MICE (Meetings, Incentives, Exhibitions, Conventions)
- 3. Marketing
- 4. Transportation

Source: San Diego Tourism Marketing District, 20 Year Destination Master Plan (Draft), December, 2015

# US Attraction Category: Top 20 Attendance & Growth

□



- Sources:
- Global Attractions Attendance Report 2015, Themed Entertainment Association
  - "25 Best Aquariums", uscitytraveler.com
  - "Americas Most Visited Zoos", travelandleisure.com

## LAST ATTRACTION VISITED IN 2015

*In addition to travel intentions, we also asked about the last attraction visited, offering the same list of choices. Not surprisingly, answers varied according to cohort:*



### MILLENNIALS

1. Zoo/Animal Attraction
  2. Theme Park
  3. Family Entertainment Center
- (Art Galleries and Sightseeing Tours tied for last)*



### GEN XERS

1. Theme Park
  2. Zoo/Animal Attraction
  3. Museum & Historic Landmark/Places (tie)
- (Art Galleries came in last)*



### BOOMERS

1. Historic Landmarks/Places
  2. Museum
  3. Theme Park
- (Old homes/mansions came in last)*



### MATURES

1. Theater
  2. Zoo/Animal Attraction
  3. Theme Park & Museums (tie)
- (Art Galleries came in last)*

# US Attraction Data: Preference by Generation

Source: "Voice of The Visitor" research paper, PGAV Destinations

*"Zoos & Aquariums are best when they make the effort to replicate the animals' natural habitats."*

- Millennial Preference

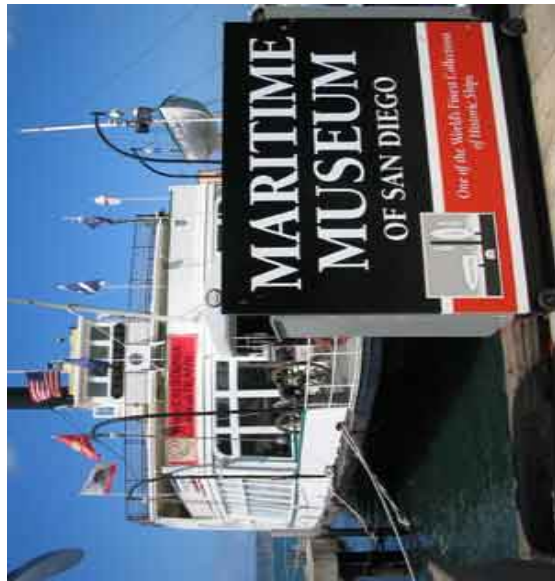
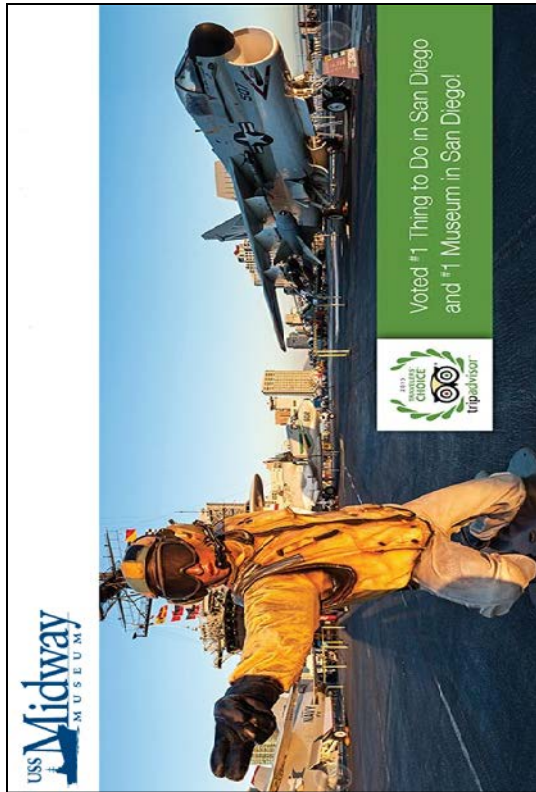
# The Port Attractions: A Fair Share suggests Port can increase Attraction Visitors by ~930k

| <u>San Diego Market Museums</u>  |
|----------------------------------|
| San Diego Aerospace Museum       |
| Museum of Contemporary Art       |
| San Diego Maritime Museum        |
| San Diego Natural History Museum |
| San Diego Museum of Art          |
| Reuben H. Fleet Science Center   |
| Birch Aquarium                   |

| <u>San Diego Market Attractions</u> |
|-------------------------------------|
| Sea World                           |
| San Diego Zoo                       |
| Safari Park                         |
| Legoland                            |
| Sea Life Aquarium                   |
| Cabrillo National Monument          |
| USS Midway                          |

|                          | 2015               |                   |                |
|--------------------------|--------------------|-------------------|----------------|
|                          | <u>Attractions</u> | <u>Attendance</u> | <u>Average</u> |
| San Diego Market         |                    |                   |                |
| Arts & Museums           | 7                  | 2,108,218         | 301,174        |
| Attractions              | 7                  | 14,623,535        | 2,089,076      |
| Total                    | 14                 | 16,731,753        | 1,195,125      |
| Port's Share             |                    |                   |                |
| Midway                   | 1                  | 1,310,000         |                |
| Maritime                 | 1                  | 150,000           |                |
| Total                    | 2                  | 1,460,000         |                |
| Share                    | 14.3%              | 8.7%              |                |
| "Fair Share" of Visitors |                    | 2,390,250         |                |
| Visitor Increase         |                    | 930,250           |                |

# The Port Attractions



# The Attractions Portfolio

Blue – Existing  
Brown – Future Possibilities

|               | Brick & Mortar                                                                                          | Revenue Generating Events/Parks                                                                                                                                            |
|---------------|---------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Small</u>  | <u>&lt;1M Visitors</u><br>Maritime Museum<br>Sport Fishing<br>Bay Cruises<br>Symphony – Summertime      | <u>&lt;20K Visitors</u><br>Taste of The Port<br>New Signature Events<br>Concerts at the Pavilion<br>Music Festival (Small)<br>Concerts in the Parks<br>Iconic Art Projects |
| <u>Medium</u> | <u>1-3M Visitors</u><br>USS Midway<br>Symphony – Year Round<br>Medium size Museum<br>Water Park or Show | <u>20-100k Visitors</u><br>Augmented Reality Exhibition(s)<br>Music Festivals<br>Mixed Use Park Space, i.e. Highline Park<br>NYC                                           |
| <u>Large</u>  | <u>&gt;3M Visitors</u><br>Museum/Theme Park<br>Larger Museums                                           | <u>&gt;100k Visitors</u><br>Collaborative Project with SDTA<br>& Relevant Stakeholders                                                                                     |

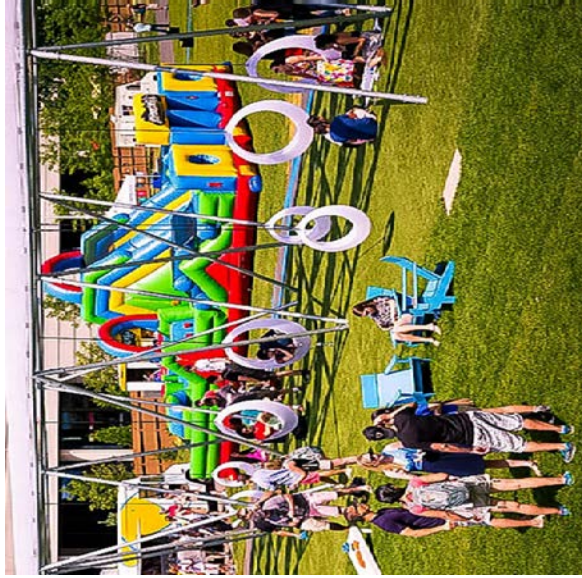
# Parks & Piers: Creating Places of



## Examples:

### Pier 25 Hudson River Park

- Mixed Purpose  
(Free Use and  
Revenue  
Generating)



### Lawn On D Boston

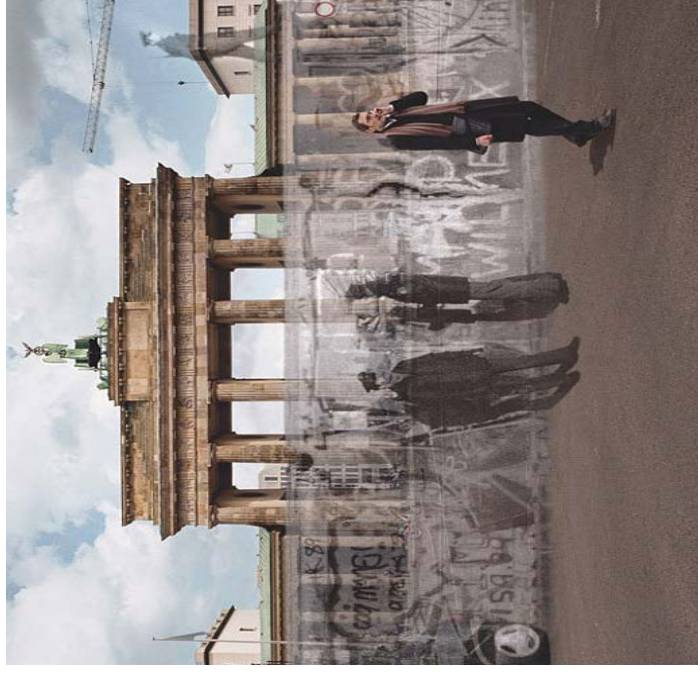
- Mixed Purpose  
(Free Use and  
Revenue  
Generating)

# .....And Then There Is Mixed Reality

## Virtual Reality



## Augmented Reality



© Copyright 2016 The Western Australian Museum

<http://museum.wa.gov.au/explore/videos/dinosaur-discovery-augmented-reality-experience>

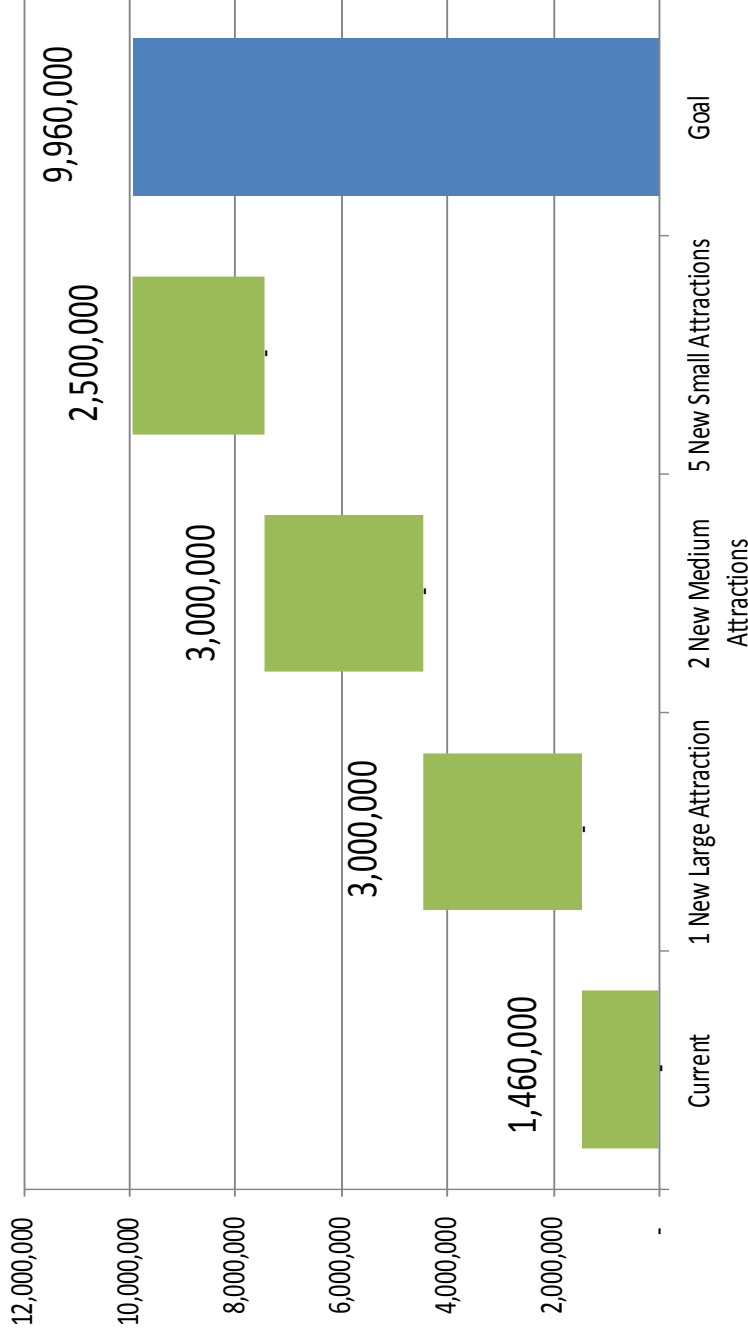
# Augmented Reality Example: Winning The Fidelity Tradeoff



# Attractions: Aspirational Goal of getting to 10M Attractions Visitors

□

## Walk to 10M Attractions Visitors



**Objective: Achieve Greater Than Fair Share**

# Staff Summary

Attractions are important elements on the Green Necklace

Attractions are #1 reason people visit and extend their stay in San Diego

Attractions are key driver in Hotel occupancy

Staff will continue to develop ideas on specific attractions in the context of Integrated Planning and will provide updates to the Board in future meetings.