

OCEANSIDE, CALIFORNIA

SUSTAINABLE TOURISM MASTER PLAN

2024-2034



A LETTER FROM VISIT OCEANSIDE

Visit Oceanside undertook this Sustainable Tourism Master Plan process with a great sense of responsibility and excitement for the future of our destination.

For the last several years, Oceanside has truly been evolving; we've seen significant development with oceanfront hotel developments, expanded local events, arts and culture, and collaborative efforts to reduce social issues particularly in the downtown. What's more, other plans will come to fruition in the next decade, including the Oceanside Transit Center redevelopment and Ocean Kamp. It was essential that this plan built upon all of the exceptional work in our community and that it built connections, where possible.

With this Sustainable Tourism Master Plan (STMP), Visit Oceanside will continue its own evolution and solidify our role as destination stewards. We will champion the implementation of the goals and initiatives articulated in this plan by working closely with our stakeholders and community members to ensure we have exceptional experiences, a strong economy with good jobs, homes for local residents, and a leadership role in caring for our environment and community well-being.

While Visit Oceanside is spearheading this effort, it is crucial to understand that Visit Oceanside alone cannot ensure the plan's success. Success requires the ongoing investment, engagement, and cooperation of all city stakeholders who must work collectively to bring the plan to life. There are also external challenges and considerations that could create headwinds in reaching our vision. Coastal Commission oversight, state issued housing mandates, loss of local control over development decisions, cost of construction and doing business in California, and limitations in land and natural resources are just a few.

The Visit Oceanside team and I extend our sincere appreciation to everyone who supported the development of this process. Oceanside truly supported this initiative, from our municipal leaders and industry stakeholders, to more than 1,500 residents who weighed in through the online survey. We are grateful to everyone who took the time to lend their input and we look forward to a very collaborative effort to bring this Sustainable Tourism Master Plan to fruition.

Yours in hospitality,

Leslee Gaul

President and CEO
Visit Oceanside



TABLE OF CONTENTS

Letter from Visit Oceanside	2
Executive Summary	4
Guiding Principles	5
Imagine it's 2034	6
Global Industry Trends	8
Market Trends	9
Industry Overview: ExperienceNext	10
2023 Futures Study	13
STMP Development Process	14
Oceanside Market Analysis	15
Asset Assessment	16
Regional Context	20
Stakeholder Engagement	20
Resident Survey	22
DestinationNEXT Assessment	23
Sustainability Risk & Opportunity Analysis	25
Overarching Key Findings	28
Recommendations	29
Vision	30
Strategic Goals	31
Goal 1: Elevate and Cultivate Events & Experiences	32
Goal 2: Enhance Connectivity and Mobility	34
Goal 3: Support Environmental Sustainability	35
Goal 4: Champion Community Stewardship	36
Visit Oceanside's Role	37
Next Steps	38
Acknowledgements	39
Sustainable Tourism Master Plan Contributors	40
Project Team	41

EXECUTIVE SUMMARY

The popularity of outdoor and beach destinations rose dramatically during the global pandemic and that popularity is projected to continue long into the future. Travelers want to be outside, and increasingly they also want unique and authentic experiences. Oceanside is in an enviable position to deliver on these key demand elements.

By undertaking a Sustainable Tourism Master Plan, the community is acknowledging the importance of the visitor economy and its potential to increase opportunities for Oceanside as a great place to live and a destination of choice in Southern California.

Led by Visit Oceanside and supported by the City of Oceanside, industry partners and other key stakeholders, the Sustainable Tourism Master Plan takes a 10 year approach to its goals and initiatives. When implemented, the ultimate goal is for a sustainable tourism ecosystem in Oceanside, inclusive of environmental, economic, and social sustainability. These efforts will not only benefit the visitor economy, but will make Oceanside an even more desirable location for corporate headquarters, businesses, and their employees, Camp Pendleton personnel and guests, and for generations of O'siders.

The goals and initiatives of the plan were developed through stakeholder input, visitation metrics, a stakeholder assessment of the destination, a detailed infrastructure analysis, and a sustainability assessment.

STRATEGIC GOALS

1

ELEVATE AND CULTIVATE EVENTS & EXPERIENCES

2

ENHANCE CONNECTIVITY & MOBILITY

3

SUPPORT ENVIRONMENTAL SUSTAINABILITY

4

CHAMPION COMMUNITY STEWARDSHIP

GUIDING PRINCIPLES

The work of the Sustainable Tourism Master Plan project team was guided by the following four principles:

SUSTAINABLE DEVELOPMENT:

Ensuring environmental, economic, and social sustainability for Oceanside.

COLLABORATION:

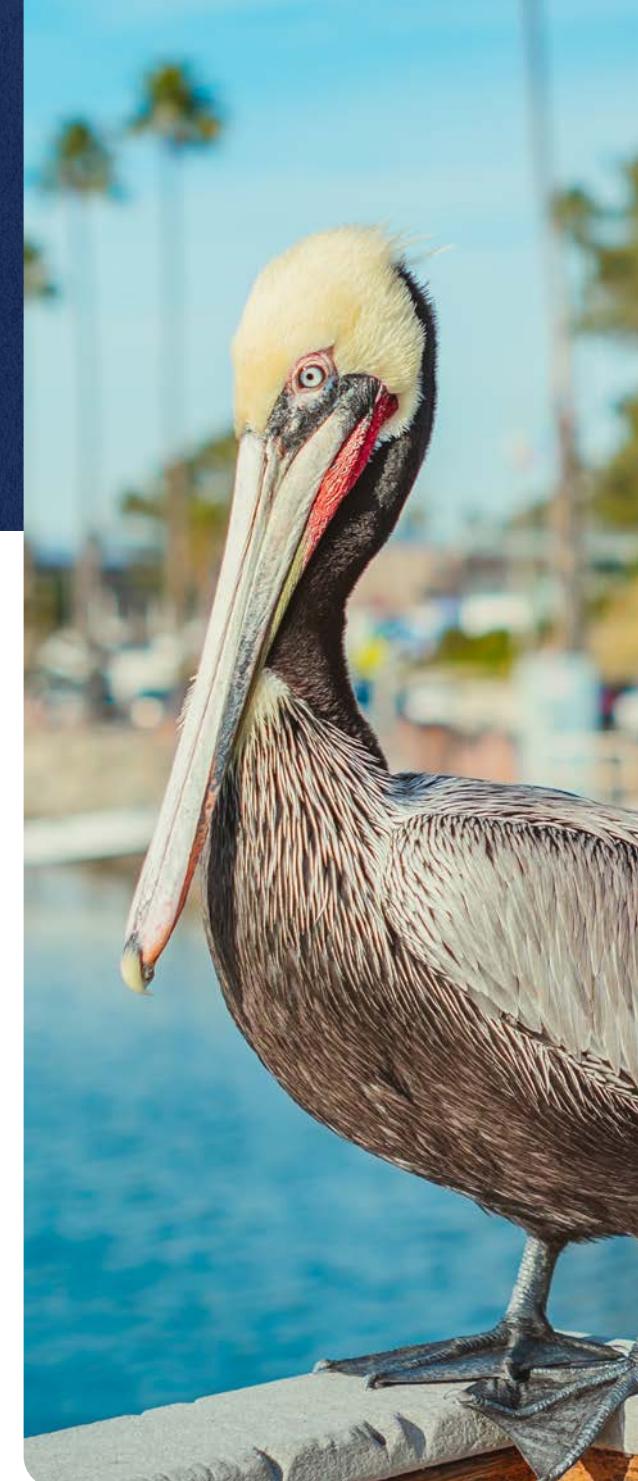
Acting thoughtfully and purposefully in inviting all members of the Oceanside community to participate and contribute their thoughts to the planning process.

QUALITY OF LIFE, EXPERIENCE, AND PLACE:

Developing recommendations that will contribute to increasing the quality of life, experience, and place in Oceanside for both residents and visitors.

STAYING TRUE TO OCEANSIDE:

Being fiercely protective of the values and unique culture of Oceanside.





IMAGINE IT'S
2034

Imagine it's 2034 in Oceanside, California.

Visitors and locals are enjoying the annual O'side Original festival that has helped to build awareness of the destination and bring attention to everything the community has to offer. There are surf and sand castle competitions, art displays, performances, and concerts in the redeveloped amphitheater. The local breweries, distilleries, and restaurants are collaborating with Oceanside's emerging agri-tourism experiences, while indigenous and other cultures are showcasing their history.

There is an adjacent conference in Oceanside's new conference center with global leaders in sand retention and beach renourishment gathered to learn about Oceanside's best practices in environmental stewardship. The initiative has grown in the past decade, becoming an internationally recognized and attended annual summit.

Throughout the festival, residents and visitors are enjoying the open and green gathering spaces downtown and people are moving throughout Oceanside with ease, on connected paths with e-bikes, on foot, or on-demand gO'side shuttle rides that extend inland.

When the annual festival wraps up, downtown Oceanside maintains its vibrancy thanks to the new businesses and residents that have moved to the area.

They feel safe and they appreciate that Oceanside's unique history and its many cultures and traditions, including those related to Camp Pendleton and Oceanside's strong surfing culture, have been maintained and honored while the city continues to evolve. Many new and longer-term residents have joined visitors in learning about Luiseno traditions through the new cultural center.

The visitor economy in Oceanside has never been stronger, thanks to a consistent - but not overwhelming - flow of visitors throughout the year. The SoCal Sports Complex improvements have contributed to the consistency, rather than seasonality, of visitors. A new park at El Corazon with trails and dog parks has made the area even more attractive to residents and visitors.

The Ocean Kamp development has opened to rave reviews and more families are coming to Oceanside for youth and amateur sport competitions and events than ever before. The community is also experiencing a resurgence of visitation from the personnel and guests of Camp Pendleton, thanks to strengthened connections and collaboration.

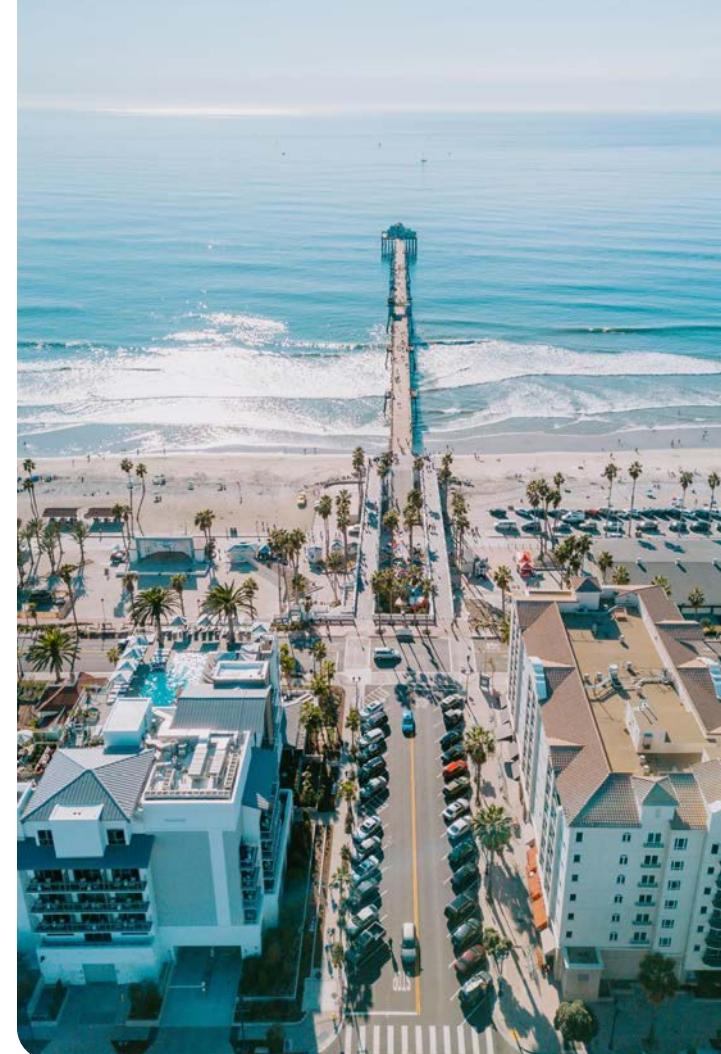
Residents and visitors appreciate and enjoy improvements to the natural areas, like the San Luis Rey River, Buena Vista Lagoon and Loma Alta Creek. Within California and across the county, Oceanside's reputation as a connected community has grown, thanks to new bike lanes and mobility options that are connecting people to these natural spaces.

Visitors are actively choosing Oceanside as a destination of choice as they travel the improved Coast Highway. In addition to beautiful beaches, the area has become known for immersive agri-tourism experiences that support working farms which grow produce and flowers for local restaurants and shops.

This new dynamic allows for hospitality-related businesses to maintain strong staffing levels year-round, ensuring their employees have consistent paychecks. Many of these employees have joined the hospitality industry thanks to workforce development programs set in motion a decade earlier.

There are also new opportunities for those working in the hospitality industry; welcoming visitors to Oceanside who have come to participate in voluntourism opportunities on the beaches and inland, thanks to the reputation the destination has developed in the environmental sustainability space.

As local leaders reflect on the changes the community has chosen to undertake, they credit the work done in 2023 to create a shared vision and road map for the visitor economy through the Sustainable Tourism Master Plan, led by Visit Oceanside.



GLOBAL INDUSTRY TRENDS



6 TOP TRENDS

MARKET TRENDS

Internationally, the travel and tourism market has seen significant shifts since the global pandemic of 2020. Six of the top market trends that are most relevant to Oceanside include:

Uneven recovery

Not every destination recovered as quickly or as robustly as others in the aftermath of the global pandemic. While beach destinations fared better than others, recovery has largely been uneven.

Technology impacts

Technology is changing how visitors choose and book vacations, how meeting and event planners source destinations, and how DMOs, CVBs, lodging partners, and experience providers engage with customers.

Purposeful travel

Travelers are increasingly seeking experiences that support personal improvement and a departure from their routines. Offering these types of experiences for different audience segments will be key to attracting new visitors.

Outdoor experiences

The global pandemic spurred a significant interest in outdoor experiences, and that trend is not dissipating. Visitors are still seeking opportunities to be outdoors, whether for adventure, walking and sightseeing, or dining.

Resiliency of meetings

In the midst of the global pandemic and in the early stages of recovery, there was speculation that meetings, conferences, and conventions would not return to the large-scale events they had been, and that virtual or hybrid meetings would overtake the industry.

The opposite has proven to be true; delegates have continued to seek - and demand - the in-person experience. Meetings, conventions, and conferences have been a resilient segment of the tourism and hospitality industry with forecasts predicting this will continue.

Fierce competition

Travel has returned in a significant way. Not only are Americans traveling more, but also international visitation to the United States has returned. This is driving fierce competition among destinations globally and a critical reason to be focused on experience development, staying aligned with consumer trends, and being prepared with resiliency plans.

INDUSTRY OVERVIEW: EXPERIENCENEXT

Tripadvisor and MMGY NextFactor have partnered to produce ExperienceNext. The purpose of this study is to compare user behavior on Tripadvisor since 2019, to identify major trends in interest and demand for experiences and destinations.

The past few years will be remembered as the most challenging ones yet for our visitor economy. Our industry has been rocked by several developments:

- COVID-19, a global pandemic, with over 767 million confirmed cases and 7 million deaths around the world
- Socio-political turmoil causing widespread riots and protests in several countries and cities
- Unprecedented natural disasters including hurricanes, earthquakes, forest fires, & floods
- Many communities struggling with public safety, gun violence, and homelessness
- Conflicts in Ukraine, Israel, and Gaza are destabilizing Europe and the Middle East.

This analysis looks at Tripadvisor data from 2019 to the end of Q2 2023, in two categories:

LOOKERS - user traffic to a given destination; and

BOOKERS - clicks to book to a given destination.

This data can be found in the upcoming ExperienceNext report to be published by MMGY NextFactor and Tripadvisor.

KEY TAKEAWAYS

U.S. Recovery Trends

The activity is compared on an annual basis to 2019 numbers, which is set as the index point. Data up to the end of Q2 2023 are included.

- Visitor activity (user traffic & clicks to book) are still significantly below 2019 levels.
- While the U.S. did not fall off as drastically in 2020 and 2021 as the rest of the world, it has not fully recovered, indicating other factors, beyond COVID-19 are still suppressing activity.
- Additional marketing efforts are still required for the industry to return to 2019 levels.

U.S. Market Share

- The U.S., more than twice the size of any of the other markets, has increased its global market share.

INDUSTRY OVERVIEW: EXPERIENCENEXT

ATTRACTION TYPES

This section looks at the trends in attraction types, based on "looker" statistics.

Global Key Takeaways:

- Outdoor, nature, and parks was by far the largest attraction type in 2019. That number surged in 2020 and 2021, before falling back in 2022, but still higher than in 2019.
- Some other attraction types (sights and landmarks, museums, and shopping) have remained steady.
- Some attraction types have fallen off including performances, theaters and concerts.
- Outdoor activities are increasing in overall popularity.

In the U.S.:

- Outdoor, nature, and parks was the dominant attraction type as well in the U.S., at 29.5% of all attractions in 2019. That number increased in 2020 and 2021 before falling back to a more normal level in 2022, but still ahead of 2019 at 30.1%.
- Three other attraction types have stayed steady during the period: sights and landmarks, museums, and shopping.
- Food and drink, as well as amusement parks have moved up.
- Some types have fallen off, including: tours, performances, and theaters and concerts.

U.S. - LOOKERS

Attraction Type	2019 % Share	2020 % Share	2021 % Share	2022 % Share
Outdoors, Nature & Parks	29.50%	39.43%	33.36%	30.06% ▲
Sights & Landmarks	13.89%	13.23%	13.31%	13.55%
Museums	10.03%	8.03%	9.27%	10.36%
Shopping	8.81%	8.78%	9.05%	8.97%
Tours	5.90%	3.99%	4.63%	4.60% ▼
Performances, Theater & Concerts	5.05%	2.70%	3.31%	4.79%
Amusement Parks	4.44%	3.13%	4.12%	4.27%
Amusement*	3.72%	3.05%	3.52%	3.68%
Food & Drink	3.28%	3.88%	3.90%	3.72%
Bars, Clubs & Nightlife	2.54%	2.25%	-	2.56%
Zoos & Aquariums	-	-	2.52%	-

*Examples of Amusement attractions include bowling alleys, mini golf courses, arcades, etc.

U.S. - BOOKERS

Attraction Type	2019 % Share	2020 % Share	2021 % Share	2022 % Share
Tours	20.48%	22.45%	21.89%	20.62%
Sights & Landmarks	17.19%	15.77%	15.11%	14.51% ▼
Nature & Parks	13.70%	12.81%	13.22%	12.07% ▼
Outdoor Activities	11.79%	14.90%	15.46%	13.69% ▲
Museums	8.24%	7.10%	6.77%	6.47% ▼
Boat Tours & Water Sports	6.72%	8.69%	9.63%	8.45% ▲
Shopping	5.59%	4.65%	4.45%	4.36% ▼
Theater & Concerts	3.27%	2.53%	2.71%	2.71% ▼
Food & Drink	2.92%	2.68%	2.33%	2.27%
Fun & Games	2.26%	-	-	1.54% ▼
Nightlife	-	1.86%	-	-
Zoos & Aquariums	-	-	1.62%	-

INDUSTRY OVERVIEW: EXPERIENCENEXT

POINTS OF INTEREST

This section identifies the top 15 points of interest in the U.S.. The list is based on “looker” statistics, and visits to different attractions and experiences.

Global Key Takeaways:

- Major points of interest are varied, including: iconic historic attractions; theme/amusement parks; resort/entertainment complexes; and outdoor parks & experiences
- There are several changes each year indicating the potential to increase interest in new, emerging attractions and experiences.

In the U.S.:

- 6 are theme/amusement parks;
- 4 are iconic historic,cultural attractions;
- 3 are resort/entertainment;
- 3 are outdoor attractions.

U.S. - MAJOR POINTS OF INTEREST

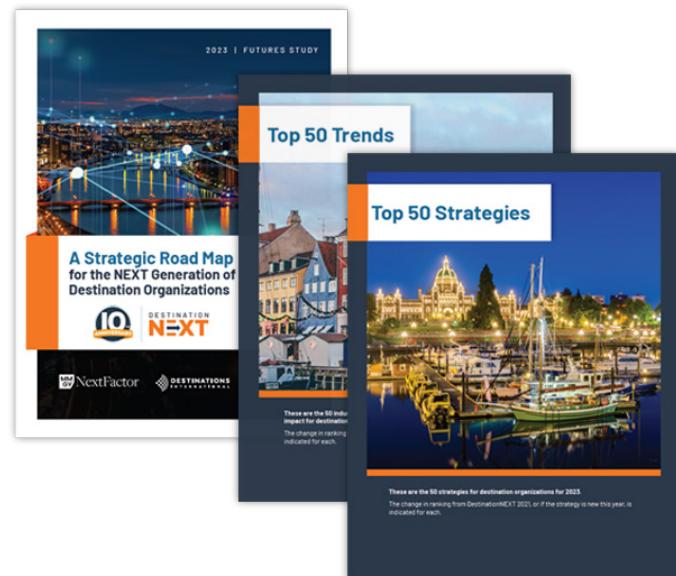
Rank	2019	2020	2021	2022
1	Universal Studios Florida	Universal Studios Florida	Universal Studios Florida	Universal Studios Florida
2	Universal Studios Hollywood	Biltmore	Universal Studios Hollywood	Universal Studios Hollywood
3	Cloud Gate	Walt Disney World Resort	Ark Encounter	Antelope Canyon
4	Walt Disney World Resort	Universal Studios Hollywood	Biltmore	SeaWorld
5	SeaWorld	The Wizarding World of Harry Potter	SeaWorld	Chicago Architecture River Cruise
6	Clearwater Beach	Devil's Bridge Trail	The Wizarding World of Harry Potter	Alcatraz Island
7	The Wizarding World of Harry Potter	South Beach	South Beach	Central Park
8	Busch Gardens	Clearwater Beach	Dollywood	Disneyland Park
9	Central Park	Dollywood	Clearwater Beach	The Wizarding World of Harry Potter
10	Times Square	Magic Kingdom Park	Walt Disney World Resort	Walt Disney World Resort
11	Magic Kingdom Park	Ark Encounter	Downtown Nashville	Times Square
12	Alcatraz Island	SeaWorld	Central Park	Ark Encounter
13	The National 9/11 Memorial & Museum	Times Square	San Antonio River Walk	Downtown Nashville
14	Antelope Canyon	Central Park	Busch Gardens	New York in One Day Guided Sightseeing Tour
15	The Strip	The Strip	Times Square	Grand Canyon West Rim Ultimate VIP Tour

2023 FUTURES STUDY

In 2023, MMGY NextFactor conducted the largest global survey of tourism industry leaders, with 837 tourism executives from 62 countries participating. This extensive process led to the development of 50 Trends and 50 Strategies.

Of the 50 Trends identified through the extensive process of the Futures Study, the consulting team identified four top trends relevant to their findings throughout the course of this project. Four transformational opportunities for our industry emerged that relate directly to Oceanside's Sustainable Tourism Master Plan – and to the future of the destination:

- 1** Customers are increasingly seeking a unique, authentic travel experience.
- 2** Communities expect to be more engaged in destination, product and experience development for locals and visitors.
- 3** Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social, and environmental impacts.
- 4** Greater industry, community and government alignment is driving destination competitiveness and brand.



The survey identified the top strategies and trends in the tourism industry, many of which align with Oceanside's strategic direction for the visitor economy and were considered during the development of this Plan.

STMP DEVELOPMENT PROCESS

OCEANSIDE MARKET ANALYSIS

Oceanside's visitor economy is gaining momentum, with total annual spending by visitors surpassing \$568 million in 2022, and the industry generating over 3,500 jobs.

Outside of the beach, Oceanside is somewhat limited in tourism offerings that compete with the greater San Diego area. However, the central location provides a competitive advantage that Oceanside has the opportunity to further capitalize on.

Table 1 highlights the area's most visited attractions in 2022, sorted by estimated unique visitors. The top attractions include Oceanside beaches, SoCal Sports Complex, Oceanside Harbor Village, Mission Pacific Beach Resort, The Seabird Ocean Resort and Spa, and the Oceanside Pier and Amphitheatre.

Table 2 lists the top attractions and tourism generators within Oceanside sorted by estimated total long-distance visitation in 2022, which is classified as visitors traveling beyond 50 miles. The percentages show how much total visitation is generated from visitors who live within 10 miles, beyond 10 miles but less than 50 miles and beyond 50 miles (local, regional, long-distance).

Recreational activities and attractions show the strongest long-distance visitation despite lower overall estimated visitation, in some cases. The long-distance visitation as a destination is strong in Oceanside.

TABLE 1: MOST VISITED SINGULAR ATTRACTIONS - BY UNIQUE VISITORS

Rank	Name	Estimated Unique Visitors	Estimated Total Visits	Average Visits per Customer	Type of Attraction
1	Oceanside Beaches	978,900	1,681,300	1.7	Recreation
2	SoCal Sports Complex	548,600	1,700,000	3.1	Sports Complex
3	Oceanside Harbor Village	519,700	816,700	1.6	Marina/Harbor
4	Mission Pacific Beach Resort	307,100	541,500	1.8	Resort
5	Oceanside Pier	281,900	430,800	1.5	Pier
6	The Seabird Ocean Resort and Spa	89,600	205,300	2.3	Resort
7	Oceanside Pier Amphitheater	63,400	98,800	1.6	Entertainment
8	William A. Wagner Aquatic Center	36,700	196,300	5.3	Recreation
9	HighPie - Top Gun House	57,200	63,200	1.1	Historic
10	Mission San Luis Rey	17,600	29,900	1.7	Specialty Museum
11	Oceanside Museum of Art	11,300	15,600	1.38	Art Museum
12	Sunshine Brooks Theatre	7,700	11,400	1.48	Theater
13	GoJump Oceanside - Municipal Airport	7,700	11,100	1.44	Recreation
14	California Surf Museum	6,000	10,300	1.72	Museum
15	Artist Alley	5,900	7,200	1.22	Public Art
16	Beach House Winery	4,600	8,600	1.87	Winery
17	Hill Street Country Club	3,000	4,100	1.37	Art Gallery

TABLE 2: MOST VISITED SINGULAR ATTRACTIONS - BY LONG-DISTANCE VISITORS

Rank	Name	Est. 2022 Unique Visitors	Est. 2022 Total Visits	Percent within 10 miles	Percent Beyond 10 miles & less than 50 miles	Percent Beyond 10 miles & less than 50 miles (Visits)	Beyond 50 miles (Visitors)	Percent Beyond 50 miles
1	Oceanside Beaches	978,900	1,681,300	20.8%	33.8%	31.9%	442,900	45.3%
2	SoCal Sports Complex	548,600	1,700,000	7.5%	32.6%	34.6%	328,300	59.8%
3	Oceanside Harbor Village	519,700	816,700	19.5%	27.0%	25.8%	279,200	53.7%
4	Mission Pacific Beach Resort	307,100	541,500	21.6%	29.4%	27.0%	148,500	48.4%
5	Oceanside Pier	281,900	430,800	19.8%	30.3%	30.5%	140,600	49.9%
6	The Seabird Ocean Resort and Spa	89,600	205,300	18.1%	23.4%	18.3%	52,400	58.5%
7	High Pie - Top Gun House	57,200	63,200	20.5%	27.6%	26.9%	29,600	51.7%
8	Oceanside Pier Amphitheater	63,400	98,800	31.2%	33.0%	27.5%	22,600	35.6%
9	William A. Wagner Aquatic Center	36,700	196,300	49.6%	31.1%	12.0%	6,900	18.8%
10	Mission San Luis Rey	17,600	29,900	29.0%	31.8%	29.1%	6,800	38.6%
11	GoJump Oceanside - Municipal Airport	7,700	11,100	9.7%	41.0%	42.3%	3,800	49.4%
12	California Surf Museum	6,000	10,300	23.3%	23.3%	17.5%	3,200	53.3%
13	Oceanside Museum of Art	11,300	15,600	49.6%	30.1%	25.6%	2,400	21.2%
14	Artist Alley	5,900	7,200	55.9%	20.3%	20.8%	1,400	23.7%
15	Sunshine Brooks Theatre	7,700	11,400	54.5%	29.9%	27.4%	1,200	15.6%
16	Beach House Winery	4,600	8,600	47.8%	30.4%	43.0%	1,000	21.7%
17	Hill Street Country Club	3,000	4,100	40.0%	33.3%	26.8%	800	26.7%

Visitation numbers are based on geofencing data
January 1 - December 31, 2022 Source: Placer.ai

ASSET ASSESSMENT

WHERE YOU ARE NOW:

Hotel supply, sports, and recreation/nature-oriented assets are the strongest in the market for Oceanside currently. Based on geofencing data, Hunden Partners concluded estimated visitation for Oceanside's top tourism attractions totaled nearly 3 million unique visitors with approximately 5.8 million visits for 2022. Oceanside's beaches are the area's top attraction with nearly 1 million visitors for 2022.

	Convention / Conference	Entertainment	Hotel Supply	Sports	Shopping Nodes	Dining Nodes	Winery, Brewery, Distillery, & Food Hall	Rec, Parks & Nature-Assets	Major Attractions & Events
Supply Oceanside, CA	Minimal	Good	Strong	Strong	Minimal	Strong	Good	Strong	Minimal
Top Assets Oceanside, CA	The Seabird Ocean Resort and Spa	Oceanside Pier Amphitheater Frontwave Arena (U/C)	Mission Pacific Beach Resort The Seabird Ocean Resort and Spa	SoCal Sports Complex William A. Wagner Aquatics Center Frontwave Arena (U/C)	Downtown Oceanside El Camino North Camino Shopping Center	Downtown Oceanside Oceanside Harbor Village	Beach House Winery Bagby Beer Company South O Brewing Co Black Plague Brewery	SLR River Trail Oceanside Beaches Oceanside Harbor	Oceanside Harbor Sunset Market Triathlon, Super Girl Surf Pro
Hotel Room Night Generation	Limited/ Weak	Moderate	Strong	Good	Limited/ Weak	Moderate	Limited/Weak	Strong	Limited/ Weak
Visitor Spending	Moderate	Moderate	Strong	Good	Good	Strong	Moderate	Strong	Moderate

Refer to Hunden Partners' complete reports for detailed assessments and analyses in Appendix B.

ASSET ASSESSMENT

HOW YOU STACK UP:

Hunden Partners analyzed similar coastal cities in Southern California to understand current tourism offerings and how Oceanside differs from its peers and comparable destinations. Oceanside has the second largest resident population amongst the peer destinations, with Huntington Beach being the largest.

Key Takeaways:

- Categories that Oceanside has strong assets and offerings compared to its peers include hotel supply, entertainment (with new developments), sports, and wineries/breweries/distilleries.
- Categories that Oceanside lacks assets and offerings compared to its peers mainly include convention & conference and shopping & dining nodes. Hunden Partners identified areas of opportunities to strengthen these assets and Oceanside's competitive advantage compared to its peers.

Category	Asset	Oceanside, CA	Peer Destinations (Out of 4)
Convention	Convention Center	NO	0
	Conference Hotel	NO	2
	Special Event Space (10,000+ SF)	NO	4
Entertainment	Outdoor Entertainment Venue (1,000+ capacity)	YES	2
	Indoor Entertainment Venue	IN DEVELOPMENT	3
	Major Family Entertainment Attraction	IN DEVELOPMENT	4
Hotel	Luxury Hotels & Resorts	YES	3
	Select Service Hotels	YES	3
	Boutique & Independent Hotels	YES	2
Sports	Professional Sports & Amateur	IN DEVELOPMENT	1
	Major Outdoor Youth Sports Development	YES	0
	Major Indoor Youth Sports Development	NO	0
	Outdoor Sports & Events (Triathlons, Surfing, etc.)	YES	3
Shopping & Dining Nodes	Downtown, "Main Street"	YES	4
	Upscale Shopping Mall or Strip Mall	NO	3
	Outlet Mall	NO	1
	Walkable Plaza/Open-Air Concept	NO	4
Winery, Brewery, Distillery, & Food Hall	Strong Downtown District (Bars & Restaurants)	YES	3
	Wineries & Distilleries	YES	1
	Food Halls, Local Cuisine & Eateries	IN DEVELOPMENT	4
	Tours & Events	YES	2
Recreation, Parks & Nature-Oriented Assets	Parks & Trails	YES	4
	Beaches	YES	4
	Nature-Oriented Tours & Events	YES	2

Refer to Hunden Partners' complete reports for detailed assessments and analyses in Appendix B.

ASSET ASSESSMENT

WHAT ARE THE OPPORTUNITIES:

Based on Oceanside's current assets and how it stacks up to its peers, Hunden Partners identified numerous opportunities in the short-, medium- and long-term. Immediate opportunities include the two developments underway, an activated plaza that connects Oceanside's beaches with its downtown giving visitors a sense of place, and coastal preservation. Other opportunities include a unique multi-purpose event space (500+ capacity) that could be tied into a food hall/"eatertainment" option that leverages Oceanside's agritourism and positions the area as a destination, SoCal Sports Complex support amenities, and a major annual event.

Opportunity	Moderate	Good	Moderate	Limited	Strong	Strong	Strong	Good
PRIORITY LEVEL								
1 Short Term (1-5 Years)	Ocean Kamp	Frontwave Arena, Ocean Kamp	Ocean Kamp	Frontwave Arena	Connectivity from beach to downtown nodes "activated plaza"	Oceanside Beach Replenishment / Activation	Ocean Kamp	
2 Medium Term (5-10 Years)	Unique multi- purpose event space (500+ capacity)		Select-service by Arena and SoCal Soccer Complex	SoCal Complex Build-Out	Food Hall / Beverage mixed with event space – "agritourism" Oceanside Harbor Village	Oceanside Harbor	Major Annual Event	
3 Long Term (10-20 Years)		Programming for Oceanside Pier Amphitheater	Boutique hotels, farm experiences "agritourism" in South Morro Hills	Leveraging William A. Wagner Aquatics Center				

Refer to Hunden Partners' complete reports for detailed assessments and analyses in Appendix B.

ASSET ASSESSMENT

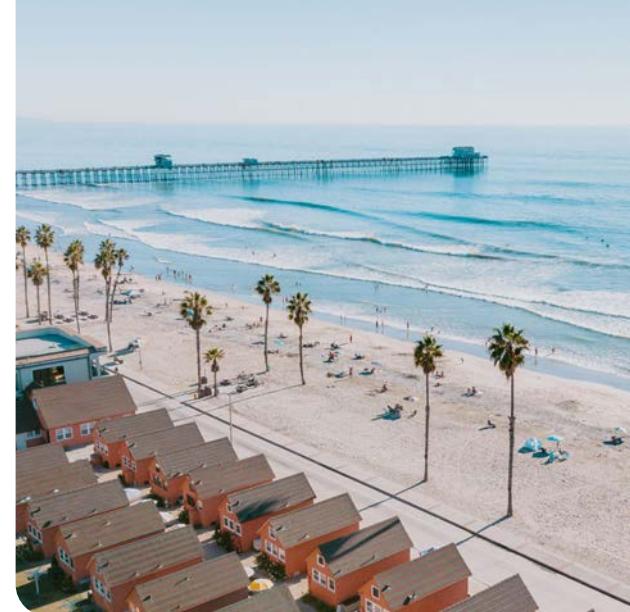
HOW WE GET THERE:

Hunden Partners recommends deeper-dive feasibility studies on key opportunities to determine market demand and financial projections, as well as economic, fiscal, and employment impact analyses. These would lead to conclusions for potential financing strategies, development strategies, and execution.

1

BEACH REPLENISHMENT AND DOWNTOWN ACTIVATION

Connectivity with Beach and Downtown, Replenishment, Vision Plan



2

ACTIVATED DESTINATION DISTRICT

Seating/Gathering Space, Brewery/Wineries, Event Space, Farm to Sea Experience at Harbor and/or Cultural Arts District



3

CONVENTION / CONFERENCE CENTER FACILITY

Regional Supply and Competition, Demand for Events

4

SOCIAL SPORTS COMPLEX IMPROVEMENTS / BUILD OUT

Additional Support Amenities, Select-Service Hotels

Refer to Hunden Partners' complete reports for detailed assessments and analyses in Appendix B.

DEVELOPMENT PROCESS

REGIONAL CONTEXT

Existing city, county and regional plans, policies, and regulations were used to inform Oceanside's Sustainable Tourism Master Plan. The project team recognizes and respects the work that has already been done in this region and considers it a solid foundation to build upon.

The following is a list of specific planning documents referenced during project research:

- General Plan Update (Onward Oceanside)
First Phase General Plan update, including Economic Development and Energy & Climate Action elements
- South Morrow Hills Community Plan
- El Corazon background
- O'Arts Master Plan
- Oceanside Coastal Management Plan
- Oceanside Pier Plaza and Junior Seau Beach Community Center plans
- Coast Highway Vision Plan
- NCTD New Office Development
- City of Oceanside Short-Term Rental Policies
- City of Oceanside Parks and Rec Master Plan
- City of Oceanside Zero Waste Plan
- City of Oceanside Urban Water Management Plan
- City of Oceanside Water Conservation and Drought Measures
- City of Oceanside Capital Improvement Program
- City of Oceanside Downtown Plans
- Visit Oceanside reports

STAKEHOLDER ENGAGEMENT

MMGY NextFactor and its partners met with over 100 stakeholders through a series of focus groups, in-depth interviews and community town halls, all which took place between January and March 2023. The primary purpose of this engagement was to identify key opportunities and challenges for the future of Oceanside as a destination for visitors and a quality place for residents to live, work, and play.

ENGAGEMENT HIGHLIGHTS:

- 14 IN-DEPTH INTERVIEWS**
- 7 SECTOR-SPECIFIC FOCUS GROUPS WITH MORE THAN 60 PARTICIPANTS**
- 2 COMMUNITY TOWN HALLS WITH 12 PARTICIPANTS**
- 3 WORKING SESSIONS WITH STEERING COMMITTEE**
- 1,514 RESPONSES TO THE RESIDENT SURVEY**

STEERING COMMITTEE

A Steering Committee of 26 community leaders from Oceanside was assembled to guide the process, advise on key considerations, ensure alignment with existing strategies and initiatives, and champion the Sustainable Tourism Master Plan from development through implementation. The Steering Committee met for four working sessions throughout the process, in addition to many participating in interviews, focus groups, surveys, and assessments.

INTERVIEWS

14 in-depth interviews were conducted in-person and virtually with community leaders and stakeholders who provided specific insights into Oceanside.

FOCUS GROUPS

Six sector-specific focus groups were facilitated with more than 60 total participants. These focus groups were highly interactive sessions that fostered new relationships amongst the following groups:

- Arts, culture, & history
- Accommodations
- Restaurants
- Sports, outdoor recreation, & attractions
- Government, transportation, & infrastructure
- Agriculture & agritourism

COMMUNITY TOWN HALLS

MMGY NextFactor facilitated two community town halls in March 2023. These community town halls were hosted in Downtown Oceanside (Civic Center Library) and Inland (El Corazon Senior Center) and were attended by approximately 12 residents, combined. These sessions were intended to offer residents further opportunity to share their vision for the future of tourism in Oceanside and were focused on solution-oriented exercises and discussion.

Following the completion of the in-depth interviews, focus groups and community town halls, key opportunities and challenges emerged:

Key opportunities:

- Outdoor recreation
- Festivals and events
- Beaches
- Arts, culture, & history
- Lifestyle & culture
- Community
- Collaboration
- Downtown
- Agritourism
- Resident engagement
- Year-round tourism

Key challenges:

- Housing
- Workforce
- Connectivity and mobility
- Environmental care and sustainability
- Beach protection

RESIDENT SURVEY

In consultation with Visit Oceanside, MMGY NextFactor developed an online survey to identify residents' perceptions on a variety of key characteristics regarding tourism and stewardship.

1,514 Oceanside residents participated in the survey from January 23 – March 15, 2023. 40% of respondents were long-time residents of Oceanside, having resided in the area for more than 20 years.

SUMMARY OF KEY FINDINGS

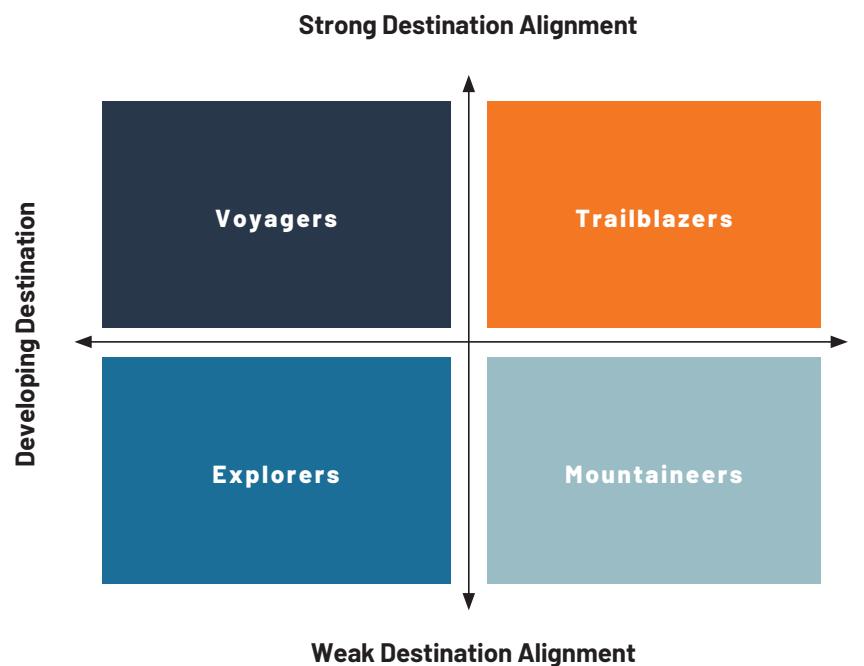
- Residents feel that improving the visitor experience in Oceanside should include beach improvements, addressing homelessness, and reducing traffic congestion and speed.
- Residents are interested in welcoming visitors who respect local lifestyle and care about protecting Oceanside's natural resources.
- Most respondents feel that the positive benefits of tourism outweigh its negative impacts.
- The priorities of residents for managing the impacts of tourism include ensuring quality drinking water, respectful visitor behaviors, waste management, and environmental preservation.



DESTINATIONNEXT ASSESSMENT

MMGY NextFactor conducted a detailed assessment of Oceanside's visitor economy utilizing a comprehensive stakeholder survey that measures perceptions of destination strength and destination alignment, based on a series of 24 variables. The results were then used to plot Oceanside into a Scenario Model, which shows the specific opportunities to build upon.

THE SCENARIO MODEL



DESTINATIONNEXT ASSESSMENT

With 122 responses from a variety of stakeholders including industry partners (39.3%), community leaders (21.3%), government leaders (10.7%), customers (6.6%), and others, Oceanside's respondents placed Oceanside in the Trailblazer quadrant, indicating very strong community alignment and above average strength of destination assets and experiences.



Destination Strength

Stakeholders rated Oceanside's unique and high-quality dining options, its assortment of authentic and unique attractions, and ease for visitors to plan a vacation highest. They felt that issues with homelessness, safety, and Oceanside's reputation for hosting meetings and conventions were the lowest performing of the Destination Strength variables.

Destination Alignment

Stakeholders rated organizational governance, economic development, and equity, diversity & inclusion very highly, while workforce development, funding support and certainty, and community and resident support rated lowest.

The recommendations from this Sustainable Tourism Master Plan aim to support Oceanside in continuing to develop the strength of the destination, while maintaining or growing its strong community alignment.

SUSTAINABILITY RISK & OPPORTUNITY ANALYSIS

APPROACH TO THE ANALYSIS

The sustainability risk and opportunity analysis undertaken by the Travel Foundation provides an overview of Oceanside's initiatives to date across a wide range of areas of sustainable development, highlighting key persistent challenges, risks, and areas of opportunity for potential future action. This was accomplished in two phases.

Phase One

The first was a Sustainable Destination Diagnostic utilizing the Mountain IDEAL sustainability criteria recognized by the Global Sustainable Tourism Council, documenting all evidence of performance within nine themes and 52 sustainable destination practices.

Phase Two

The second phase entailed reviewing the documentation of Oceanside's existing initiatives using the Travel Foundation's Optimal Value Framework which looks at tourism's contribution to Economic Impacts, Environmental & Climate Change Impacts, Societal Impacts, Cultural Impacts, as well as Tourism Product, Marketing, and Governance practices. Each was reviewed according to significant challenges being faced, the efforts to address challenges to date, and the priority level for future action based on risk, global best practice, and stakeholder consultations. This led to the identification of gaps and opportunities for future action.

SUMMARY OF KEY FINDINGS

Visit Oceanside has a multitude of positive foundations to build upon in order to progress in sustainability and destination stewardship going forward. Its position as a central point of communications can be leveraged to build awareness and education among visitors, residents, and industry stakeholders alike, to galvanize collective action around priority issues.

A major strength is that there is significant collaboration between Visit Oceanside and the City of Oceanside across the departments that are essential for implementing key initiatives in preserving natural assets and strengthening the social fabric of the destination.

In terms of risk, there are early signs of deteriorating resident satisfaction and access (amenities, affordability, etc.) that could become more difficult to manage if not prioritized. Likewise, climate change and development impacts to Oceanside's beaches require not only prioritization, but adaptation measures including diversification of product and marketing to ensure sustainability of the tourism economy and livelihoods.

It will be important to engage, incentivize, and support the private sector to prioritize demonstrable action on sustainability, destination stewardship, and climate action in order to deliver on sustainable tourism goals.

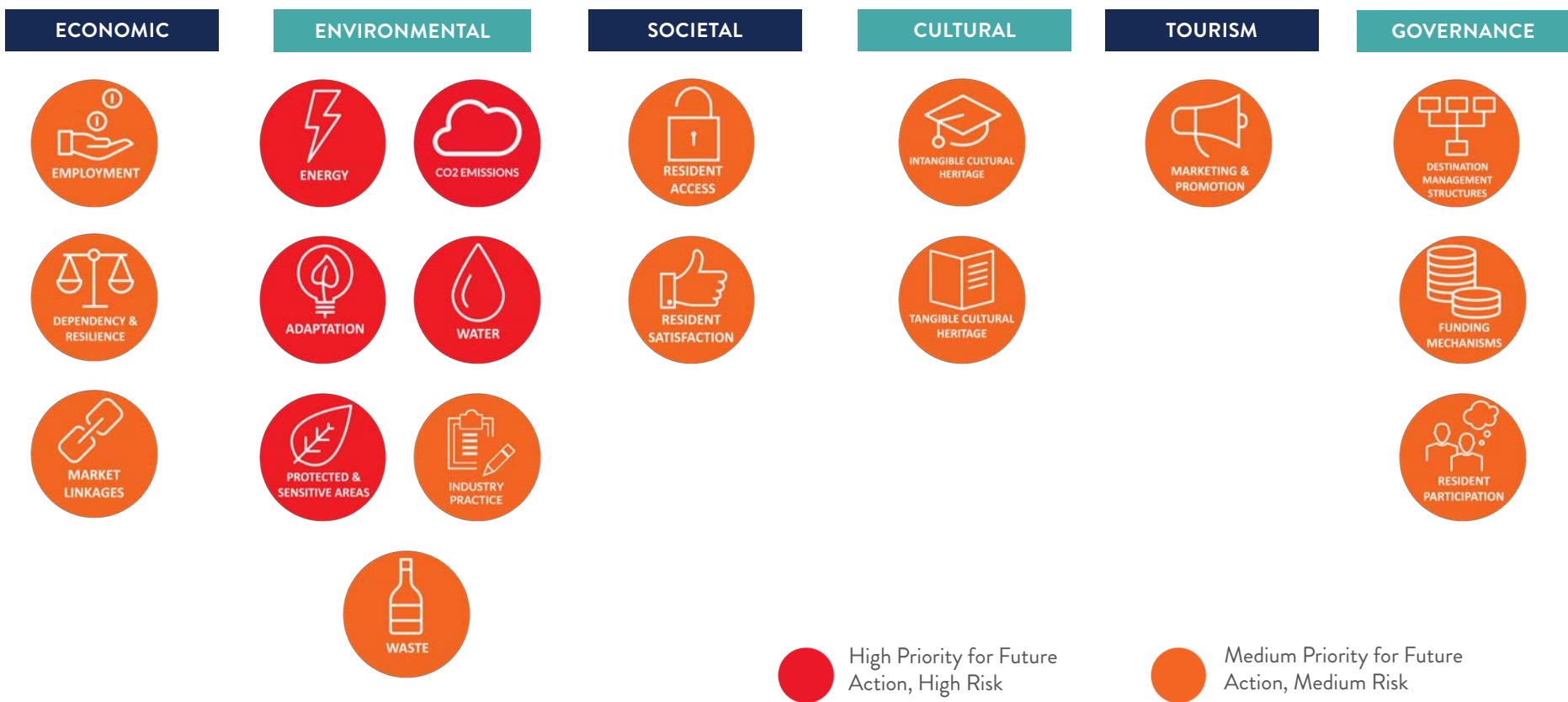
A formalized approach to integrated destination management – one that includes cross sector collaboration, funding mechanisms, communication strategy, and monitoring system – will be key to implement and achieve ongoing sustainable tourism goals. Oceanside has an opportunity to preempt some of the more negative impacts from tourism that can take place, by acting proactively now to address potential risks including tourism impacts and external threats.

Refer to the Travel Foundation's complete reports for detailed assessments and analyses in Appendix A.

SUSTAINABILITY RISK & OPPORTUNITY ANALYSIS

This review focuses on risk and priority for future action for each area. It is not a reflection per se on what functions or organizations are doing in these areas. There are many progressive and effective programs in place. The reason many are labeled “red” here is due to high risk, and high priority to act, because tourism growth has the potential to exacerbate current challenges. There are external risks such as homelessness and climate change increasing the pressures on these areas and despite some great results achieved there are still threats. Items that are in amber are deemed to have increasing potential risk and there are significant areas for improvement.

SUSTAINABILITY ANALYSIS RESULTS: HIGH & MEDIUM RISKS



Refer to the Travel Foundation's complete reports for detailed assessments and analyses in Appendix A.

SUSTAINABILITY RISK & OPPORTUNITY ANALYSIS

TOP IDENTIFIED RISKS

1. Climate change and development impacts to weather, shoreline & beaches poses risks to tourism economy and livelihoods (in addition to wellbeing of nature and residents).
2. Lack of affordability of childcare and healthcare and decreasing housing affordability is contributing to a workforce shortage across sectors (including emergency services).
3. Signs of reducing resident satisfaction and engagement, partly due to access (for example to the beach during peak times, concerns about parking and traffic) will likely increase as tourism volume increases if management measures are not put in place.
4. The decreasing feasibility & competitiveness of the agricultural sector could lead to the loss of producers and food security as well as the cultural identity of the region.
5. A lack of alignment of the private sector with sustainability aspirations could risk image as well as hinder progress on sustainable tourism goals.
6. Without a formal destination stewardship coordination structure, monitoring system and funding mechanism for mitigating impacts, it will be difficult to manage risks as tourism volume increases.

TOP RECOMMENDED ACTIONS

1. Address climate change and beach erosion priorities.
2. Address housing, workforce, and other resident satisfaction factors.
3. Address need for destination stewardship governance systems.
4. Leverage Visit Oceanside's position as a communications hub to build awareness and education on destination stewardship priorities and opportunities.
5. Ensure growth beyond the downtown to support balance in the community and throughout the year.

Refer to the Travel Foundation's complete reports for detailed assessments and analyses in Appendix A.



OVERARCHING KEY FINDINGS

Following the extensive analysis of the Oceanside market and its potential, 10 overarching key findings emerged:

10
KEY FINDINGS

- 1 The volume and diversity of events including the necessary infrastructure to increase year-round visitation must be addressed.
- 2 Sport and convention infrastructure development and attraction is needed.
- 3 Experience development is needed in Oceanside to “create places to go to, not through”.
- 4 Experience and infrastructure growth must extend beyond downtown.
- 5 Arts and culture opportunities and experiences can be further leveraged for residents and visitors.
- 6 Improved public transportation and wayfinding options are required, particularly those that align with sustainability goals and those that connect the coast and inland areas.
- 7 Agritourism aligns with community values and is an important, untapped opportunity for visitors.
- 8 Environmental sustainability, including beach renourishment, is critical.
- 9 Work must continue to address homelessness, crime, and safety issues that are impacting visitors and visitor-facing businesses.
- 10 There is a strong desire to maintain the authenticity of Oceanside.

RECOMMENDATIONS



VISION

A shared vision for Oceanside was created to guide the direction of this Sustainable Tourism Master Plan.

A successful vision incorporates three key elements: first, it should be inspirational, meaning it is a vision that the community is inspired to achieve. Next, it should be aspirational, meaning that it is not a reflection of the community at the time it was created. Finally, the vision should reflect key priorities.

Based on the information from the comprehensive assessments and research, and the input from stakeholders and residents, the Sustainable Tourism Master Plan Steering Committee developed the following long-term vision for Oceanside:

**VIBRANCY meets AUTHENTICITY
IN SOUTHERN CALIFORNIA'S
MOST CREATIVE COASTAL DESTINATION**

It was important to stakeholders to maintain the authenticity of Oceanside's history and vibe, while articulating the community's desire to increase its vibrancy in multiple ways; through new experiences including agricultural / agritourism, events and downtown developments.

It was also important to reflect the creativity of the people and culture of Oceanside. That creativity is expressed in traditional ways through visual and performing arts, and through the community's creativity and ingenuity in finding solutions to environmental and social challenges.

STRATEGIC GOALS

Emerging from the collective work of MMGY NextFactor, Hunden Partners and the Travel Foundation, are four strategic goals that offer guidance on how Oceanside will achieve its shared vision.

Each goal is supported by initiatives that – in order to be successful – must be contributed to by multiple partners and stakeholders in Oceanside. When successfully implemented, these goals and subsequent initiatives will make a positive impact on the resident quality of life, quality of visitor experience, environmental quality, and quality of economy in Oceanside.



1

ELEVATE AND CULTIVATE
EVENTS & EXPERIENCES

2

ENHANCE CONNECTIVITY
& MOBILITY

3

SUPPORT ENVIRONMENTAL
SUSTAINABILITY

4

CHAMPION COMMUNITY
STEWARDSHIP

STRATEGIC GOAL ONE

ELEVATE AND CULTIVATE EVENTS & EXPERIENCES



Oceanside has a rich history and vibrant local culture that can be further cultivated to create signature events and facilities that will put Oceanside on the map. By furthering initiatives like the SoCal Sports Complex improvements, Oceanside will attract more year-round visitation through youth sports. This is a segment of visitors that has proven resilient against external factors, including recessions.

By developing an O'side O'iginal festival, the unique culture and flavor of Oceanside can be showcased, while incorporating elements that showcase the landscape and natural beauty of the area. It can be furthered by incorporating environmentally sustainable practices and educational or conference sessions about sand retention. Agritourism is another significant opportunity for Oceanside to cultivate. Not only is the local support for agritourism strong, but travelers are increasingly seeking these types of unique and authentic experiences.

Each of the initiatives in this goal are meant to further the quality and variety of experiences in Oceanside, for the benefit of visitors, residents and the local economy.

ACTION ITEMS:

- 1.1 Further improvements within El Corazon Park, including the SoCal Sports Complex, Frontwave Arena, parkland development and other amenities for the benefit of visitors and residents. Collaboration with the City will be meaningful for advancing many of these initiatives.
- 1.2 Lead the development of a major annual event that aligns with Oceanside's brand and vision (for example, an O'side Original Festival featuring multi-sensory activities, including music, local artisans, local breweries, restaurants and produce, surf competitions, sandcastle competitions, drone shows, demonstration sports, and more).
- 1.3 Develop an event attraction strategy to target events with brand, cultural, ROI, and need-periods alignment.
- 1.4 Collaborate with agriculture partners to develop new agritourism experiences and events, and continue to support South Morro Hills Community Vision Plan for agritourism.
- 1.5 Support the Ocean Kamp development as a hotel, destination experience, and event space.
- 1.6 Develop and activate the Oceanside Cultural District within the downtown with seating/gathering and green spaces, brewery/winery, and event space. Align and collaborate these initiatives with the arts & culture community to create a unique sense of place. Locations to consider include Regal Plaza and Lot 34.
- 1.7 Continue to support of the City's beachfront improvement projects, including the Pier, Lifeguard Headquarters, Community Center, Bandshell, and Amphitheater.
- 1.8 Explore development of the harbor to promote, enhance, and/or create new coastal dependent opportunities and visitor-serving businesses, activations, and events.
- 1.9 Explore Convention / Conference Center facility development, including identification of location, required accommodations, and visitor services.
- 1.10 Support the implementation of the O'Arts Master Plan, the Oceanside Cultural District, and other arts and cultural initiatives, including preserving the Indigenous cultures that are so integral to Oceanside.

STRATEGIC GOAL ONE

ELEVATE AND CULTIVATE EVENTS & EXPERIENCES



TOP RECOMMENDATIONS FOR A DEEPER DIVE

Based on Hunden Partners' assessment, a deeper dive feasibility study should be considered on the following key opportunities that were determined. This would help determine market demand and financial projections as well as economic, fiscal, and employment impact analysis. These would lead to conclusions for potential financial strategies, development strategies, and execution.

1

BEACH REPLENISHMENT AND DOWNTOWN ACTIVATION

Connectivity with Beach and Downtown, Replenishment, Vision Plan

2

ACTIVATED DESTINATION DISTRICT

Seating/Gathering Space, Brewery/Wineries, Event Space, Farm to Sea Experience at Harbor and/or Cultural Arts District

3

CONVENTION / CONFERENCE CENTER FACILITY

Regional Supply and Competition, Demand for Events

4

SOCAL SPORTS COMPLEX IMPROVEMENTS / BUILD OUT

Additional Support Amenities, Select-Service Hotels

STRATEGIC GOAL TWO

ENHANCE CONNECTIVITY AND MOBILITY



Comparatively speaking, Oceanside has the benefit of multiple access points for visitors; it is within driving distance of multiple international airports, connected by Amtrak and has MetroLink connectivity through NCTD. Once in Oceanside however, it is important that visitors are easily able to get around the destination in the mode they prefer.

Visit Oceanside, The City of Oceanside and the San Diego Association of Governments recently invested in the gO'side Shuttle Program, a seasonal, on-demand shuttle service that operates for a nominal user fee. This is an excellent example of a collaboration that aligns sustainable transportation with ease of access for all types of users - locals, visitors, and employees.

Expanding this program beyond its current seasonal operations and beyond the downtown into inland Oceanside will require investment and planning, but could make a significant impact on reducing traffic, encouraging movement throughout all of Oceanside and helping hospitality workers get to their place of employment.

ACTION ITEMS:

- 2.1 Improve public transportation options in conjunction with the redeveloped Oceanside Transit Center.
- 2.2 Expand mobility options, particularly those that align with sustainability goals and connect to coastal and inland areas (including expanding Circuit routes).
- 2.3 Add consistent wayfinding and parking signage downtown and throughout the destination. Collaborate with arts & cultural groups to make it unique to Oceanside.
- 2.4 Create and expand greenways, trail, and bike systems to connect key areas of interest in Oceanside, and protect beach set-backs during any development.
- 2.5 Promote pedestrian and bicycle-friendly development and connectivity, and continue to support the Coast Highway Vision Plan, the Coastal Rail Trail and Inland Bike Trail.
- 2.6 Add e-bike charging stations.
- 2.7 Incorporate more walkable and bikeable options downtown and continue to support the Coast Highway Vision Plan.
- 2.8 Connect free WIFI in the Downtown and other major gathering spaces.
- 2.9 Support the City's efforts to enhance digital connectivity for residents and visitors.
- 2.10 Promote connectivity through public art and work with the Arts Commission.

STRATEGIC GOAL THREE

SUPPORT ENVIRONMENTAL SUSTAINABILITY



Oceanside's beauty is undeniable. By protecting its natural assets through innovative initiatives, Oceanside can extend that work to invite visitors to become stewards of the environment.

Oceanside has a multitude of positive foundations to build upon in order to progress in sustainability and destination stewardship. A major strength is that there is significant collaboration between Visit Oceanside and the City of Oceanside across the departments that are essential for implementing key initiatives in preserving natural assets and strengthening the social fabric of the destination.

It will be important to engage, incentivize and support the private sector to prioritize demonstrable action on sustainability, destination stewardship, and climate action in order to deliver on sustainable tourism goals.

Additionally, a formalized approach to integrated destination management – one that includes cross sector collaboration, funding mechanisms, communication strategy, and monitoring system - will be key to implementing and achieving ongoing sustainable tourism goals. Oceanside has an opportunity to preempt some of the more negative impacts from tourism that can take place by acting proactively to address potential risks including tourism impacts and external threats.

ACTION ITEMS:

- 3.1 Develop a Coastal Management Plan. The 2023 Adaptation Plan can inform and provide groundwork for a Coastal Management Plan.
- 3.2 Promote efficient use of limited land resources and preservation of natural resources.
- 3.3 Balance the ecological, aesthetic, and recreational value of the natural environment.
- 3.4 Partner with the City to ensure new development adheres to the adopted Climate Action Plan.
- 3.5 Advocate for acceleration of agritourism plan adoption and funding.
- 3.6 Incentivize private sector action on and contribution to sustainability, stewardship, circular economy, protection & restoration.
- 3.7 Continue the high prioritization of funding and resourcing of shoreline mitigation.
- 3.8 Collaborate with local partners to develop volunteer tourism experiences and events.
- 3.9 Execute an engaging and collaborative education campaign to educate visitors about caring for Oceanside and expected behaviors around trash disposal, recycling, beach etiquette, water and energy conservation, and human-wildlife interactions, including incentives and deals at local establishments.
- 3.10 Continue to be a leader in sustainable coastal management by pursuing the BEACH ideal certification or other official certification.

STRATEGIC GOAL FOUR

CHAMPION COMMUNITY STEWARDSHIP



Nationwide, tourism destinations are placing increased emphasis on engaging their local residents. This is a relatively new role for Destination Marketing Organizations, which have traditionally been focused exclusively on marketing and selling the destination, as opposed to further developing it in ways that will contribute to quality of life for residents.

Oceanside has a strong opportunity to further engage residents in the visitor economy by helping to make workforce opportunities available and highlight their benefits.

The opportunity also exists to further engage with residents who don't reside downtown. By developing partnerships with local businesses to incentivize residents to spend more time downtown, it can also serve as an opportunity to showcase how the industry is supporting both locals and visitors.

Finally, Oceanside's work to support homelessness and social issues should be supported by the tourism industry and others to ensure a sense of safety and welcome for everyone.

ACTION ITEMS:

- 4.1 Support local workforce development and talent retention initiatives by partnering with high schools, community colleges, and other educational institutions to develop internship programs and build awareness of careers in the hospitality industry.
- 4.2 Align with local safety and homelessness initiatives, particularly in the downtown. Partner with organizations that work with underrepresented and underserved communities to improve inclusion.
- 4.3 Undertake an accessibility assessment of infrastructure and experiences to understand opportunities to increase accessibility for all residents and visitors to Oceanside.
- 4.4 Increase consistent resident engagement and measurement of satisfaction. Continue to celebrate and embrace our diverse community.
- 4.5 Advocate for affordable housing initiatives, including considering regulations on short-term rentals.
- 4.6 Create safe and secure public spaces where people feel comfortable.
- 4.7 Provide engaging and enriching public amenities and enhance access to community facilities.
- 4.8 Develop a digital passport/incentive program to encourage locals to explore all of Oceanside's offerings within downtown and beyond.
- 4.9 Develop tourism ambassador program to help educate industry, city staff, and community to help elevate visitor experience and understanding.
- 4.10 Foster positive relationship with personnel and leadership at Camp Pendleton with consistent communication and partnership opportunities.



VISIT OCEANSIDE'S ROLE IN THE SUSTAINABLE TOURISM MASTER PLAN

The strategic goals and recommendations in this plan are a result of this collective process and represent the ideas and aspirations of the people who live in, and contribute to, Oceanside.

In order to achieve the destination vision articulated in the STMP, it will require a collective, community-wide implementation effort across multiple organizations as well as the City of Oceanside, the tourism industry and community stakeholders.

Visit Oceanside doesn't own the assets and experiences related to the local visitor economy, and therefore, it cannot single-handedly move this Sustainable Tourism Master Plan forward. Their role in implementing the STMP moving forward will take many forms, including:

ADVOCATE:

There will be instances where Visit Oceanside advocates for the advancement of strategic initiatives that will advance Oceanside for the benefit of visitors and residents.

CONVENER:

Visit Oceanside may be the conveners of groups and those in positions to advance initiatives.

LEADER:

There will be instances where Visit Oceanside takes the lead as the organization to advance initiatives.

SUPPORTER:

Finally, Visit Oceanside will be the supporting or partnering organization on initiatives with other leading organizations.



NEXT STEPS

To be successful, long-term strategic planning requires significant focus on implementation. To support the successful implementation of this plan, a corresponding implementation guide has been shared with Visit Oceanside.

The implementation plan prioritizes actions for the first three years of the plan, articulates which organizations should be included, and outlines roles and responsibilities. The Steering Committee responsible for guiding the development of this plan will remain engaged through the implementation process, as this plan will require support and lift from multiple community stakeholders.

It is recommended that as stewards of the Sustainable Tourism Master Plan, Visit Oceanside appoint a champion responsible for the implementation and ongoing work on the Plan. It is further recommended that there is public reporting on the progress of the Plan, to demonstrate accountability and highlight the efforts and organizations involved.



ACKNOWLEDGEMENTS

SUSTAINABLE TOURISM MASTER PLAN

CONTRIBUTORS

Visit Oceanside would like to thank the regional community leaders who gave of their time and expertise as they served on the Steering Committee, providing guidance, leadership, and support of the development of the Sustainable Tourism Master Plan.

STEERING COMMITTEE

Visit Oceanside Executive Committee

Chairman Scott Hausknecht
Dual GM, Residence Inn and Courtyard by Marriott Oceanside

Secretary Nayan Patel
GM, Days Inn at the Coast

Tim Obert
Area Managing Director, Mission Pacific Beach Resort and The Seabird Ocean Resort and Spa

Stormi Posch
GM, SpringHill Suites Marriott Oceanside

City of Oceanside

CJ Di Mento
Library Director

Colleen Foster
Environmental Officer (former)

Michelle Geller
Economic Development Manager

Manuel Gonzalez
Parks and Recreation Director

Darlene Nicandro
Director of Development Services

Rob O'Brien
Deputy City Manager/
Human Resources Director

Jayme Timberlake
Coastal Zone Administrator

Shannon Vitale
Senior Planner

Visit Oceanside Brand Agency

Paul Whitbeck
Managing Partner, Greenhaus

BOARD OF DIRECTORS

Lauren Aldrich
Owner, The Brick Hotel

Sage Anderson
Owner, Privateer Coal Fire Pizza

Sean Bowers
President, Frontwave Arena

Zell Dwelley
Owner, Beach Break Café

David Fischbach
Owner, Beach Front Only

Ernie Prieto
Owner, Oceanside SEA Center

Jim Schroder
Economic Development Commission

Paul Terzis
GM, Best Western Plus

Michael Tsai
Regional Manager, Holiday Inn Oceanside Marina

BOARD LIAISONS

Scott Ashton
Oceanside Chamber of Commerce

Louise Balma
South Morro Hills

Jeremy Cohen
SD Malkin Properties

Amy Forsythe
Camp Pendleton

Michelle Geller
City of Oceanside

Howard LaGrange
City of Oceanside

Pete Lawrence
Oceanside Fire Department

Captain John McKean
Oceanside Police Department

Kim Murray
Beach House Winery

Amy Walker-Pinneo
MiraCosta College

Colonel Dan Whitley
Camp Pendleton

Rick Wright
Main Street Association

Patrick Young
City of Oceanside



PROJECT TEAM

We would like to thank the dedicated project team members who worked diligently to move this project forward, from concept to completion. We want to acknowledge the partnership with MMGY NextFactor - the lead agency on the project - and collaborating agencies, Hunden Partners, for their expertise in destination assessments, and the Travel Foundation, for their expertise in sustainable tourism analysis and practices. The depth of knowledge and focus this team brought to the planning process was appreciated.

This plan is, by design, a living document that will continue to deliver exceptional value to the community as we journey through the implementation phase and forge new partnerships along the way.

VISIT OCEANSIDE STAFF

Leslee Gaul
President & CEO

ManLai Tam
Executive Assistant / Operations Manager

Tyler Garcia
VP Business & Brand Development

Michelle Martini-Brown
Director of Sales Operations

Viri Martinez
Business Development Manager

Shae Geary
Director of Public Relations & Corporate Communications

Tanner Yates
Director of Marketing & Communications

Veronica Voorhees
Marketing Operations Manager

Jenny Roberts
Creative Marketing Manager

Lydia Petroff
Welcome Center Manager

Lela Brown
Visitor Services Coordinator

Lydia Mcjilton
Volunteer Coordinator

CONSULTING AGENCIES

MMGY NextFactor

Paul Ouimet
President & Partner

Cassandra McAuley
SVP Destination Stewardship

Linda John
Executive Consultant

Teresa Allan
Senior Manager, Client Success

Hunden Partners

Rob Hunden
President & CEO

Lexi Cuff
Senior Analyst

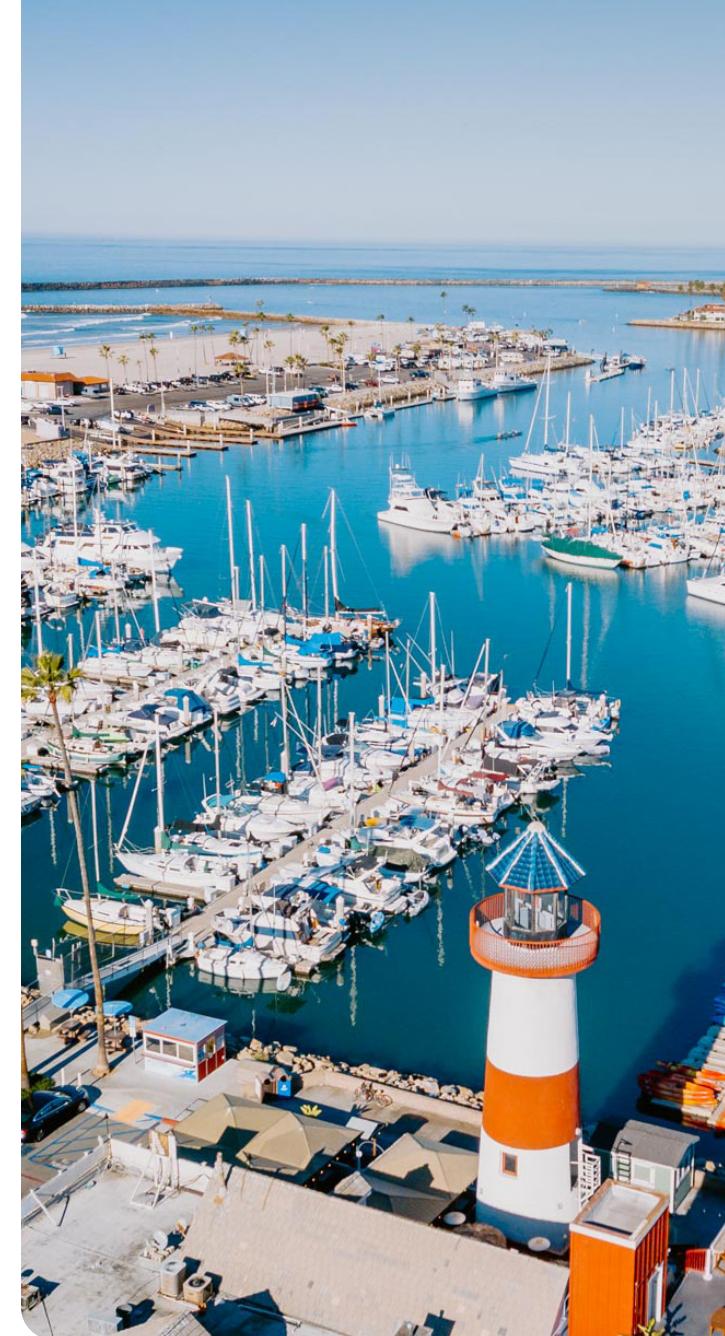
Matthew Avila
Project Manager

The Travel Foundation

Jeremy Sampson
CEO

Kelly Galaski
Sustainable Tourism Specialist

Bobby Chappell
Destination Sustainability Assessor





Visit Oceanside
Conference and Visitors Bureau
928 N. Coast Highway
Oceanside, CA 92054
800-350-7873
visitorinfo@visitoceanside.org
visitoceanside.org