



VISIT CALIFORNIA

Regional Strategic Tourism Plans

September 21, 2022



Contact

Jones Lang LaSalle Americas Inc.

Contact Information:

Daniel Fenton, Executive Vice President

One Front Street Suite 2100

San Francisco, California 94111

M +1 408 309-3450

dan.fenton@am.jll.com

Bethanie DeRose, Senior Vice President

M +1 609 457 5361

bethanie.derose@am.jll.com

September 21, 2022

Caroline Beteta
President and Chief Executive Officer
Visit California

RE: REGIONAL STRATEGIC TOURISM PLANS RFP

Dear Caroline,

Jones Lang LaSalle Americas, Inc. (JLL) is pleased to present our proposal for the Visit California Regional Strategic Tourism Plans RFP. Enclosed is a comprehensive proposal that features JLL's notable experience developing strategies for tourism destinations large and small. We have customized our approach to address the nuances of each of the 12 tourism regions while ensuring that each plan is developed with the integrity of our globally-proven approach. We hope you will see that our firm, primary team, experience and expert partners are the right fit for this incredible project.

We take seriously the importance of creating an approach that places a high priority on the values of your state, its regions and stakeholders. JLL believes in helping destinations evolve sustainably, with actionable steps that put people first and are equal parts reasonable, but also innovative. We look forward to an opportunity to gain insight and develop priorities that are positioned to make each region successful with a responsible approach to tourism.

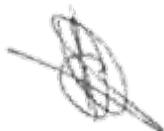
We have the right team for this assignment. JLL brings national expertise in destination development, tourism and global sustainability. We understand the unique dynamics of destinations and we have developed custom solutions and strategic plans to guide smarter tourism investment for public sector partners across the nation. Additionally, JLL brought in some of the best minds to support the execution of this effort: EY, The Zimmerman Agency, the World Travel & Tourism Council, SWCA Environmental Consultants, Risklayer, and Tourism Economics. This work is vital to the tourism industry and to the regions across California and we have assembled the right team for the job. We are proud of the team we have assembled, and we look forward to leveraging our collective existing expertise across the state to produce the best outcome for the Visit California and its 12 regions.

JLL's system for leveraging stakeholder-driven and future-focused strategic plans has helped destination organizations transform their operations, grow tourism impacts and improve quality of life for residents. Using our globally recognized Destination Readiness Index as the foundational element for this project, along with the other designated JLL proprietary tools, we will determine the destination development opportunities and obstacles and determine a sustainable path forward for each region. The Destination Readiness Index will uniquely enable the team to deliver data-driven regional priorities and inform our discussions with stakeholders across the state.

JLL has an unmatched commitment to gathering and molding intense volumes of stakeholder input with our facilitation approach. The guidance and views of the tourism industry and related stakeholders (i.e., those that intersect with tourism such as transportation and housing), and statewide thought leaders and will shape the direction and outcome of this strategic plan. JLL's process takes into account the vastly different dynamics of urban and rural regions – providing outcomes that are unique to each region, but also highlight commonalities between them so they can work alongside each other.

Our goal is to create each of the 12 plans that are developed by and in conjunction with Visit California, its leaders, destination partners, business owners, and engaged residents. At JLL, we believe our combined data-and stakeholder-driven process shapes Strategic Tourism Plans to help destinations successfully blend quality of place with sustainable actions to improve tourism success. Additionally, the team's world-renown specialists in issues such as housing, transportation and the environment will ensure the strategy is holistic and supports the future for each region and the state.

If you have any questions do not hesitate to reach out to me or Bethanie DeRose, Senior Vice President.



Daniel Fenton
Executive Vice President
Director of JLL's Global Tourism Practice
T +1-408-309-3450
dan.fenton@am.jll.com



Gilda Perez-Alvarado
Global Chief Executive Officer
Hotels and Hospitality
T +1-212-812-5897
gilda.perez-alvarado@am.jll.com

**We would be honored
to be your partner.**





Contents

Executive Summary	1
Project Team Experience	2
Additional JLL + EY Experience	10
Project Team Personnel	29
Project Team Subcontractors	42
Project Approach	61
Proposed Budget	80
Financial Documents	81

Executive

Summary

Jones Lang LaSalle Americas, Inc. is the entity submitting this response as the primary proposer. JLL has vast experience in facilitating large and complex community and statewide networks on behalf of destination organizations. JLL’s Tourism & Destination Advisory team has former Destination Management Organization (DMO) leadership, Destination International past chair, Certified Destination Management Executives (CDME), and over 30 years of industry experience with 10 years consulting for our industry. JLL has worked across and within state organizations, regions, counties and broad geographic boundaries to gather feedback, insight, and guidance to develop comprehensive strategic plans.

JLL is the only fortune 500 firm with a long term relationship with the World Travel & Tourism Council (WTTC). Our global firm understands the implications of the global tourism industry, and has brought a unique partnerships with WTTC forward for this effort. Additionally, JLL is proud to have assembled a team of globally recognized brands to support Visit California and its 12 regions. Under JLL’s leadership our integrated team includes industry expertise and execution resources from our partners at EY.

JLL understands this is an effort to comprehensively plan for 12 unique regions of the state of California. Our approach to successfully facilitating this level of outreach is inclusive in nature. JLL will work with the DMOs and their staff to identify key leaders and organizations in each of the 12 regions. JLL will liaise with these entities in order to garner participation and attendance and to build Regional Advisory Committees to engage in the process, identify nuances in the region and validate outcomes.

Beyond just facilitation, our approach is data-driven. Through our exclusive collaboration with WTTC, JLL has developed the Tourism Readiness Index, a proprietary tool to analyze destination positioning. This index provides clear insight across categories that directly affect and are tangentially affected by the tourism economy – over 75 different data points. The outcomes from the Tourism Readiness Index provide priorities for destinations to focus on in strategic planning efforts.

We have studied your priorities and have provided an approach that maximizes your goals. Throughout this proposal we’ve outlined our streamlined project approach, which we believe will be successful in achieving all the priorities listed in your RFP, including: Tourism marketing and promotion, Economic development, Sustainability, Workforce development and labor shortages, Visitor safety, Housing, Public infrastructure, and Transportation/Traffic. JLL has not only integrated these issues into our approach we also bring internal and external expertise into the team to specifically address those areas.

JLL’s approach is structured in a way that will allow for concurrent development and completion of all 12 plans. Through our team’s resources and intentionality with all outreach, we will ensure that all stakeholders, especially those from underserved communities, will have input. JLL will leverage stakeholder meetings, remote polling, web surveys, digital dashboards, in-market focus groups, open dialogue or email updates to ensure that even the smallest voice is heard.

JLL will lead the engagement, supervise and deliver all work, and is committed to being compliant with the contract’s terms and conditions. With regards to internal controls, JLL is a Fortune 500 company with robust accounting structure that will provide a seamless experience for Visit California on the client service and accounting fronts. Our commitment is to develop 12 regional plans that not only set the course for the future but position Visit California as a leading organization dedicated to producing tangible results.





PROJECT TEAM EXPERIENCE





ABOUT OUR FIRM.

Jones Lang LaSalle Incorporated, incorporated in 1997, is a Maryland corporation. Our common stock is listed on The New York Stock Exchange (“NYSE”) under the symbol “JLL.” JLL is a Fortune 500 company with annual revenue of \$18.0 billion, operations in over 80 countries and a global workforce of over 93,000 as of December 31, 2019.

JLL is a leading professional services firm with specialized experts in tourism strategy advisory. We shape the future of destinations for a better world by creating solutions, building relationships and most of all, using data to recommend tailored approaches for our clients. As a practice, the Hotels and Hospitality Group maintains 49 global offices. In the last five years, the group’s 350-strong global team has helped solve nearly 5,300 unique client challenges by completing advisory, development, valuation and asset management assignments. We have worked cities, regions, states and international destinations – partnering to positively impact the tourism economies and make their destinations more sustainable for future growth.

JLL provides a full range of tourism strategy services for both public and private clients. Our team has extensive experience in providing global strategy and positioning services as well as destination development and a full range of advisory services at the tactical level that enhance the destinations in which we work. Our global platform and diverse service and product offerings position us to best support our clients in such a dynamic and localized industry and to successfully navigate the challenging markets in which we compete worldwide.





ABOUT OUR FIRM.

Ernst & Young LLP (together with its affiliate, Ernst & Young US LLP, the “Firm”) is a private limited liability partnership established over 30 years ago. The US firm is owned by approximately 3,600 US partners and principals and no individual partner or principal owns more than a 1% interest in the partnership.

The firm and its predecessors have been in business in the US for more than 100 years. The roots of EY date to the early 1900s and to the lasting legacies of two visionaries — A.C. Ernst and Arthur Young. In 1903, A.C. Ernst opened the first office of the US firm in Cleveland, Ohio. On 1 July 1989, Ernst & Whinney merged with Arthur Young to create the US firm. The US firm is a member of Ernst & Young Global Limited, an organization whose locally owned member firms operate under the “EY” name in more than 150 countries around the world. The Americas area, formed in 2006, comprises member firms in 30 countries and more than 75,000 people. EY refers to the global organization of member firms of Ernst & Young Global Limited, each of which is a separate legal entity.

About EY Global Destination & Tourism Advisory

The EY Global Destination & Tourism Advisory team is a globally integrated practice leveraging best practices, knowledge, and subject matter experience from among 307,000 professionals across the world, including 16,000 hospitality and tourism professionals. The team has served global and national destinations for over 20 years. The team has developed an innovative, flexible approach that pulls together relevant EY disciplines to help deliver significant benefits — often from improved investment to strengthened economic impact. Through this approach, we help unlock the value of destinations and may help clients realize increased revenue. EY’s Global Destination & Tourism Advisory offering is a purpose-driven solution that can allow clients to define and prioritize their strategic goals, develop and implement the tools and initiatives to reach those goals, and monitor performance against them, relative to competitive destinations. By putting visitors, investors, businesses and communities at the heart of a destination’s strategy, a plan is developed that meets the needs and expectations of all stakeholders.

We help destinations achieve their critical goals, including:

Addressing

direct and indirect economic impact for the destination

Creating

a framework to facilitate sustainable tourism development

Enhancing

profitability of tourism infrastructure entities, contributing to the viability of the destination

Identifying

competitive advantages and disadvantages to set priorities and engage stakeholders

Attracting

private sector development and investment

Forming

and stimulating public-private partnerships

Prioritizing

sequencing targeted initiatives to increase visitor length of stay, overall visitation and spend

Implementing

and monitoring transformational change in your destination



ABOUT OUR FIRM.

The World Travel & Tourism Council is the global authority on the economic and social contribution of Travel & Tourism. Our mission is to maximize the inclusive and sustainable growth potential of the Travel & Tourism sector by partnering with governments, destinations, communities, and other stakeholders to drive economic development, create jobs, reduce poverty and foster peace, security, and understanding in our world.

WTTC promotes sustainable growth for the Travel & Tourism sector, working with governments and international institutions to create jobs, to drive exports and to generate prosperity. Council Members are the Chairs, Presidents and Chief Executives of the world's leading private sector Travel & Tourism businesses.

Together with Oxford Economics, WTTC produces annual research that shows Travel & Tourism to be one of the world's largest sectors, supporting 289 million jobs and generating 6.1% of global GDP in 2021. Comprehensive reports quantify, compare and forecast the economic impact of Travel & Tourism on 185 economies around the world. In addition to individual country fact sheets, and fuller country reports, WTTC produces a world report highlighting global trends and 26 further reports that focus on regions, sub-regions and economic and geographic groups.

 [WTTC.org](https://www.wttc.org)

 [@WTandC](https://www.instagram.com/WTandC)

   [@WTTCC](https://www.facebook.com/WTTCC)



ABOUT OUR FIRM.

The Zimmerman Agency was founded in 1987 in Tallahassee, Florida and is a Florida Corporation incorporated in Delaware. In 2004 the agency was acquired by Omnicom Group, the world's leading holding company for marketing communications first. The agency employs 124 amazing professionals.

The agency operates on a hyper-integrated platform of communications with a unique *balance of marketing disciplines* all operating in synergy, unified by client business objectives. The result is the ability to prescribe solutions based on client needs rather than the limitations of a traditional agency structure.

The agency is focused on the hospitality and travel category providing marketing communications services including advertising, public relations, social media and digital activation. Clients include destinations, hotels, resorts, hotel management companies, cruise lines, rental car companies and other travel-related partners.

At the core of everything the agency provides clients is a proprietary planning methodology and philosophy aptly named; Momentum. Through Momentum client and agency teams craft a clear Ambition for the brand and a fresh, often bold idea to overcome the status quo and accelerate growth. The culture of the agency is uncommon in today's world. Agency DNA is clearly driven by energy and determination. But, our people share a special bond emboldened by the experiences that have lead them to an agency and city where the balance of work and life is enabled through incredible surroundings, friendships and clients.





ABOUT OUR FIRM.

Tourism Diversity Matters' mission is to be a diversity resource that will educate, advocate, engage and empower the tourism and events industry in collaboration and cooperation with all other industry initiatives.

Tourism Diversity Matters (TDM), founded as the collaborative leader of Diversity, Equity and Inclusion (DEI) initiatives and concepts that can address the gaps of ethnic disparities and provide decision-makers in the tourism and events industry access, resources, and tactics to develop more effective Diversity & Inclusion strategies that will engage and retain a diverse workforce.

At TDM, we focus on four primary pillars of activity to benefit the Tourism Industry: Apprenticeships, Workforce Development, Diversity Equity and Inclusion, Research and Data.

TDM's goal is to sustain and expand our platform by affiliating with fellow industry partners and notable research institutions, creating solutions that can be implemented, contributing to organizational success.



Firm Profile



At Risklayer we understand how to develop monitoring and evaluation systems for resilience planning. We have over 12 years of experience in developing and implementing our Resilience Master Planning process for major cities and destinations such as Istanbul, Amman, Kathmandu, Metro Manila, Mumbai and Dar es Salaam. Our Travel Risk platform uses powerful risk analytics and predictive modelling used by insurance and reinsurance to assess multiple risk for different destinations, and the starting point of a building a comprehensive destination resilience plan.

JLL is partnering with Risklayer, an international risk analytics and resilience management company based in Germany and Australia, to lead the development of tourism resiliency plans across the six established tourism regions and at an aggregated state-wide level. Combining the competencies of our organizations, we provide many years of experience in facilitating the integration of risk information, sustainability and resilience concepts into destination resiliency planning.

JLL and Risklayer (together, the Project Team) have worked in many destinations worldwide – from cities to states to countries – in designing and implementing effective resiliency plans using solutions based on science and co-created with stakeholders. JLL’s project team of engineers, land use planners and sustainability and tourism experts have shaped policy and practice in key areas of resilience, in countries such as Algeria, Jordan, Turkey, Nepal, India, Bangladesh, Tanzania, Philippines, and many others.

We understand how resilience plans are developed, organized and managed and we know the entry points to prioritize their implementation and allocation of resources. We have the proven expertise to implement a comprehensive approach for resilience planning in tourism destinations to rationalize and define major investments, protect lives, upgrade infrastructure, and enhance the capacity of communities and institutions in managing risks and living in a more productive, safe and sustainable environment.

The Project Team has completed resilience plans, and associated resilience investment plans, in some of the most complex regions in the world using its flagship Resilience Master Planning (RMP) approach. The RMP is an interdisciplinary and multi-sectoral approach to engage and guide the stakeholders in formulating resilience strategies and structuring these strategies into short-term to medium-term resilience action plans that mobilize resources and action from all stakeholders.

We use an integrated scientific approach where multiple hazards, vulnerability, and risk parameters are analyzed and interpreted in the context of the tourism regions’ regulatory environment, functional operations, and development parameters to support the resilience planning process.

We view resilience as the baseline for sustainability, and sustainable growth the net impact of tourism on the economy, society, climate and the environment. This viewpoint is embedded across our approach. Collaborating with our clients and steering committees, we utilize a participatory management structure that engages stakeholders, builds ownership and accountability, and enables sustainability.

Firm Profile



Tourism Economics is an Oxford Economics company and is able to leverage extensive resources as part of this partnership. Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts, and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Tourism Economics operates with a singular objective: combine an understanding of tourism dynamics with rigorous economics in order to answer the most important questions facing operators, destinations, strategic planners and others in the sector. By combining quantitative methods with industry knowledge, Tourism Economics designs forecasting models, custom market strategies, tourism policy analysis, and economic impact studies.

Our team of 34 economists is focused exclusively on the interplay between the travel industry and the economy. No other firm possesses the depth or range of experience in measuring travel economic impacts. Our economic impact client list includes the following:

- Over 30 US states and territories with county-level impact analysis for hundreds of counties across these states
- City tourism impact analysis for approximately 50 destinations each year
- Country-level economic impact analysis for 185 countries on behalf of the World Travel & Tourism Council
- Gaming economic impacts by state for the American Gaming Association
- Hotel sector economic impacts by state for the American Hotel & Lodging Association
- Meetings impact analysis for the US for the Events Industry Council
- Event impact modeling for 280 destinations around the world based on the Event Impact Calculator developed on behalf of Destinations International
- The global economic impact of user generated content on behalf of TripAdvisor

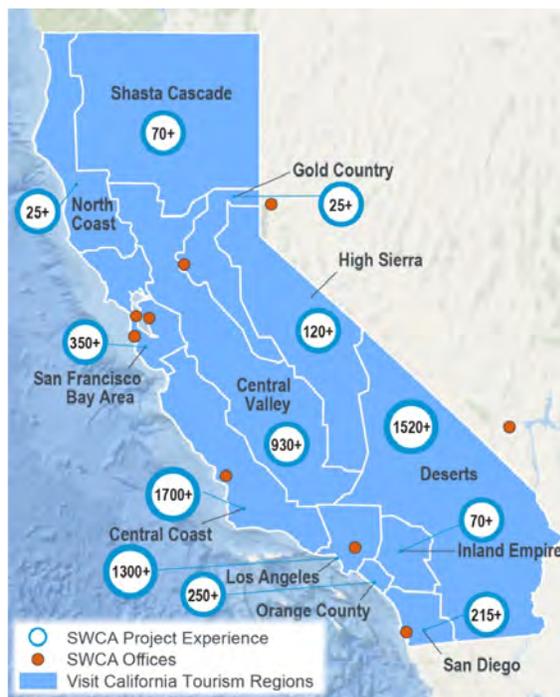
Tourism Economics operates as a boutique tourism consulting company in one important sense: we assign senior staff at the center of each project. Our project directors are integrally involved in every stage and its development.

Firm Profile



SWCA Environmental Consultants (SWCA) is one of the largest environmental consulting companies in the United States with a focus solely on environmental science. With specialized expertise in California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA) compliance, cultural and natural resources management, permitting, and environmental compliance, we strive to help clients achieve their objectives by reconciling potential conflicts between human activities and environmental quality, using sound science to develop creative solutions.

Since 1981, SWCA has grown into a large business with more than **1,300 employees in 38 offices nationwide, including seven offices in California—Sacramento, San Francisco, Half Moon Bay, Oakland, San Luis Obispo, Pasadena, and San Diego**, making the company one of the largest environmental consulting firms in the state. With over 240 professionals in these seven offices, we can quickly mobilize personnel with the relevant expertise, experience, and understanding of local issues. Our nationwide pool of resource specialists is available to assist our local offices, positioning SWCA to support our clients with dynamic, fast-paced projects that require additional mobilization of large field crews and minimizing risks related to project schedule and delivery. SWCA offers the size and stability of a large company with the focus and responsiveness of a small local firm. Resumes are included for all our proposed key team members who are all living and working in California, including Northern and Central California Vice President **Laura Moran**, Ecological Restoration and Natural Resources Planning Director **Lauren Huff**, Senior Restoration Ecologist **Mark Brandi**, Senior Environmental/Recreation Planner **Bill Spain**, Senior Geospatial Scientist **Jon Campbell**, Senior Ecologist **Angela Chongpinitchai**, Northern California Cultural Resources Director **Joshua Peabody**, Senior Cultural Resources Team Lead **Garret Root**, and Principal Planning Team Lead **Julie Barlow**.



SWCA has held and supported contracts with multiple California agencies in every tourism region and prepared over 6,000 projects throughout the state. Some of those agencies include California State Coastal Conservancy, California Department of Water Resources, California State Parks, California Department of Parks and Recreation, California Department of Housing and Community Development, California Department of Transportation, and California Department of Fish and Wildlife. Our team has also built excellent relationships with California regulatory agencies. We leverage these relationships to facilitate permitting, development of quality defensible environmental documents, public involvement and engagement strategy, ability to manage complexity and come up with creative solutions.



ADDITIONAL
JLL+ EY EXPERIENCE



FACILITIES + RESOURCES.

Cities, states and countries across the globe are leveraging the tourism industry to drive new growth, expansion of industry and long-term sustainability for their communities on the world stage. Our team provides the expertise to drive new destination thinking in a globally competitive landscape.

20	California Offices	47	Offices
4,289	California Based Employees	350	Global specialists
		150+	Global Destinations studied



TOP FIRM

No. 1 in Forbes Best Employers for Diversity in America for 2021

Named to Bloomberg Gender-Equality Index for second year in a row

Score of 100 for Best Places to Work for Disability Inclusion



We Know

Destinations.

We serve as guides in the strategic management of tourism in a sustainable manner consistent with economic goals and cultural values shaped by preservation of natural resources, resident desires and visitor industry needs.



Proven methods

We are practitioners and are thought-leaders in the tourism industry and apply that expertise to build destination strategic plans.

Leveraging expertise

To date, JLL has advised over 50 destinations on destination strategic plans, organizational assessments, asset optimization strategies, and visitor profiles worldwide.

Outcome oriented

We pride ourselves on partnering with clients to produce implementation focused results. Why undergo a strategic planning effort, if you can't implement it?

Awards + Accolades



Fortune
Fortune 500 Company list
(2015-2020)



Dow Jones Sustainability
Index North America
4th year in a row



World's Most Admired Companies
Fortune Magazine
5th year in a row



HUMAN
RIGHTS
CAMPAIGN

Perfect Score on the Human
Rights Campaign Foundation's
Corporate Equality Index
6th year in a row



World's Most Ethical Companies
Ethisphere Institute
13th year in a row



Energy Star Sustained Excellence Award
U.S. Environmental Protection Agency
8th year in a row

Tourism + Destination Development.

JLL provides a full range of services to enhance our clients' destinations. For both public and private clients seeking to maximize the impact of tourism on their destinations. Our team has the breadth and depth of experience and proprietary approaches in providing not only destination development services, but also a full range of advisory services that enhance the destinations in which we work. Tourism strategy services include:



Organizational Positioning

- Strategic planning
- Governance
- Stakeholder input
- Deployment
- Accountability
- Goal setting



Market Development

- Primary research
- Target markets
- Customer research
- MICE impacts
- Gap analysis
- Digital Readiness
- Resilience & Sustainability



Destination Development

- Market research
- Benchmarking analysis
- Competitive positioning
- Demand Driver Scorecard
- Readiness Index
- Infrastructure/ Transportation analysis
- Resilience & Sustainability



Readiness Planning

- Current state review
- Environmental scan
- Lodging analysis
- Policy review
- Economic development strategy
- Quality of place
- Smart growth
- Resilience & Sustainability



Statewide Experience.

JLL has worked with a variety of destinations, all of which included extensive dialogue with their respective state entities in the process. Our team understands the nuances of the State tourism development process and will work accordingly with both the State of California and its regions.

CALIFORNIA



FLORIDA



NEW YORK



COLORADO



TEXAS



Global Sustainability.

In collaboration with the World Green Building Council, JLL continues its commitment to taking bold climate action. In 2019, JLL became the first consultancy to sign up to the WorldGBC's Net Zero Carbon Buildings Commitment (NZCB), which helped establish a blueprint for our global NZCB Commitment. We are committed to achieving net zero carbon emissions across all JLL-occupied buildings by 2030. Our practice applies these same principles and initiatives to clients, advocating this approach to both clients and suppliers.

Applied Sustainability Initiatives with Recent Clients



Global Partnerships on Sustainability



Tourism Readiness

Thought Leadership.

JLL knows that cities are global hubs accelerating business, innovation and job creation all around the world. That is why our team is committed to global partnerships to further this industry's impact. JLL has worked with leading global think tanks to advise on policy and operationalize it into practice. This year, JLL & WTTC released the new 2022 Index.



In 2019, JLL released a joint research report with the World Travel & Tourism Council (WTTC) on global tourism readiness. The research indexed 50 global cities and their positioning for a successful tourism industry based on 75+ data points using JLL & WTTC's joint expertise in the field. Our methodology developed five-typologies of destinations.



Our team works closely with Destinations International to support destination marketing organizations in achieving their ambitions. Our practice lead, Dan Fenton, was a former chair of this international organization. Bethanie DeRose and Juliet Velazquez currently sit on the Global Leadership and Convention Sales and Services Committees for Destinations International to support JLL's global reach and are instrumental in providing strategic recommendations influencing policy change in the industry.



Through our work with the World Economic Forum (WEF), JLL is able to be a leading advisory voice on issues related to emerging markets, sustainability and competitiveness. JLL & WEF understand the importance of tourism to drive the health and success of adjacent industries i.e., retail, restaurants, transportation and overall quality of place.



Similar Project

WTTC

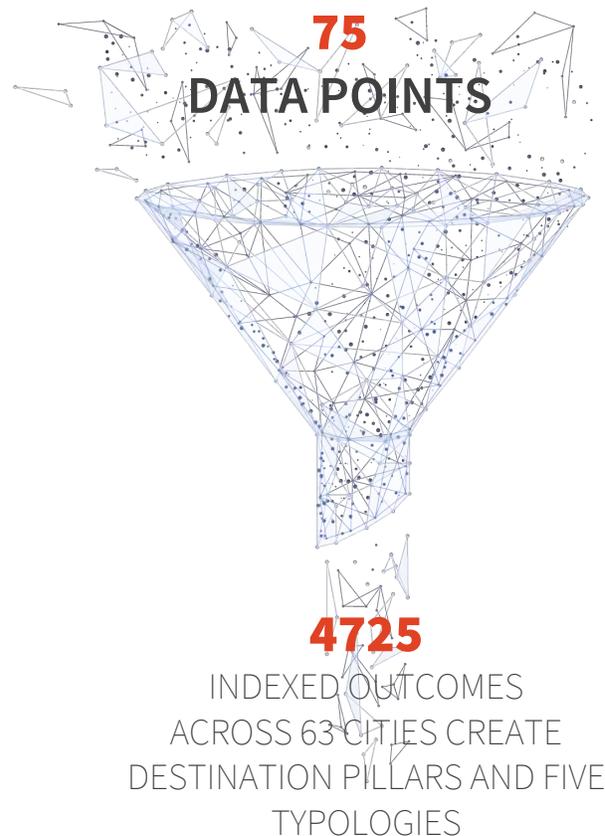
World Travel & Tourism Council Research

JLL knows that cities are global hubs accelerating business, innovation and job creation all around the world. That is why our team is committed to global partnerships to further this industry's impact. JLL has worked with leading global think tanks to advise on policy and operationalize it into practice.

In 2019, JLL released a joint research report with the World Travel & Tourism Council (WTTC) on global tourism readiness. The research indexed 50 global cities and their positioning for a successful tourism industry based on 75+ data points using JLL & WTTC's joint expertise in the field.

The research study centered on evaluating global cities' readiness for future expected tourism volumes. The study focused on approximately 45-50 global gateway cities, clustering the markets into groupings in terms of their readiness for the future expected growth in tourism and the resulting challenges and opportunities.

This year, to take a more comprehensive look at tourism growth as a global destination of choice, this updated report revisited our framework from 2019; enhancing it to include new pillars which highlight the rising importance of sustainability, safety & security and social impact on the global agenda.



Similar Project

Hawaii

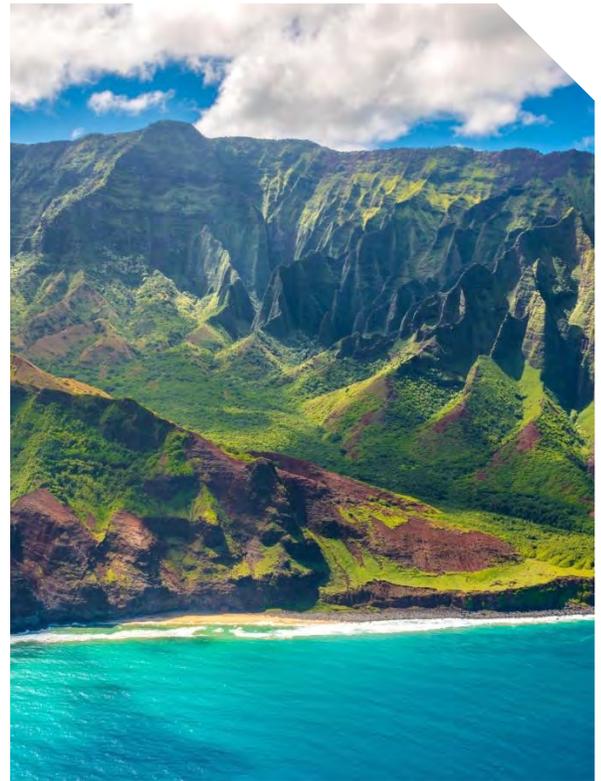
Destination and Tourism Development for Meet Hawaii

From 2011 to 2013, JLL (formerly SAG) worked with the Hawaii Tourism Authority to create a group sales platform that included domestic and international contractors. This included a new approach to managing results and determining unified metrics that focused on conversion. JLL worked with the HTA and the International Contractors to develop a plan to drive new group business with increased accountability for HTA and all domestic and international contractors involved.

Through this process, JLL helped develop the “Meet Hawaii” brand, which not only united the tourism community, but also united the sales staff at the CVB and the collective domestic and international assets to sell the destination cohesively.

HTA as well as the Convention Center and Visitors and Convention Bureau accepted JLL’s recommendations. JLL was retained to implement the recommendations and has completed extensive market research and a comprehensive redeployment effort. The implementation effort created a comprehensive document that is currently used as the roadmap for the new direction.

The evolution of the focus of group sales efforts being based on measurable definite bookings and not focused on lead generation is an example of instituting new accountability. The other development was JLL’s recommendation and support of the implementation of the TAP report that serves as a new effective tool for understanding current Meet Hawaii results.



Similar Project

Puerto Rico

Strategic Planning for Old San Juan

JLL assisted Forest City and the Commonwealth of Puerto Rico to plan, assemble, entitle, and develop Phase I of a 100 acres of underutilized parcel to support the island’s tourism initiatives along the waterfront canal immediately adjacent to Old San Juan.

Our team created a strategic plan using existing public resources as leverage to begin the transformation process and grow the ability to attract private sector interest and investment capital. In collaboration with the Puerto Rico Tourism Company, and the Puerto Rico Convention Center District Authority, the ultimate goal of the area was to invest in infrastructure that would appeal to both residents and visitors.

The project is slated for \$1.5 billion of future investment, which will include retail, restaurants, hotels, tourism attractions, public market and spaces, multifamily residential, office, and other civic uses.

After assembling and entitling the site, JLL led the refurbishing and re-envisioning Pier 8 into a mixed use civic space that included a restaurant, concession area, performance venue, urban beach, a seaplane operation, tall ship attraction and trapeze school. The project, including its centerpiece “Café Ocho,” opened in December 2012.



Similar Projects

San Francisco

Destination Planning- Economic Impact

JLL was originally engaged by San Francisco Travel (SF Travel) to complete Cost Benefit Analysis and Community and Industry Impact Analysis related to the potential expansion scenarios at the Moscone Center. This work was completed in 2012 and recommendations related to scenarios studied have been implemented and are now in construction. This effort included detailed market data analysis as well as industry analysis to create projections related to impact of implementation.

In 2018, SF Travel reengaged JLL to conduct an economic and community impact study of the Moscone Center's closure on the surrounding hotel and hospitality partners as well as the impact out into the neighborhoods surrounding the Moscone Center. The goal was to demonstrate the value of the Moscone Center through qualitative and quantitative methods. JLL interviewed 25 hotel, hospitality and tourism businesses to understand how their respective business dealt with the closure during construction. The results of these conversations were compared against market data to determine the value added to the market when the Moscone Center is in full operation.

This effort was a non-traditional approach to an impact study to reflect the market demand and unique market dynamics in San Francisco. SF Travel and its industry stakeholders believe this method more effectively illustrated the value of the convention center and reinforced the need to continue investment in order to further the success of the local industry and economy.



Project Dates:
2011-2012, 2018-2019

Project Components:

- Cost Benefit Analysis
- Historical Performance Analysis
- Primary Research
- Stakeholder Engagement
- Visitor Modeling
- Financial Modeling
- Return on Investment Justification
- Report & Recommendations



Similar Projects

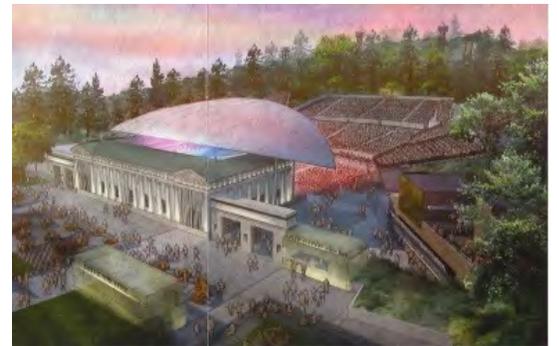
Los Angeles

Greek Theatre in Griffith Park

JLL was selected by the City of Los Angeles, Department of Recreation and Parks to reposition the Greek Theater through the development of a new vision and facilitating a new agreement between the LA Greek Theatre and a new operator and promoter. The Greek Theatre is one of many venues managed by the Department, which has an annual budget of \$200 million dollars. The goal of this project was to determine how to best position the theatre to compete for top revenue shows among larger venues in the area.

Our firm led in the community and stakeholder engagement process including completing over 100 interviews and surveys and meeting with individuals in the surrounding neighborhoods and park area. We also worked with the finance department in the creation and administration of the RFP process to solicit a new operator/promoter. In addition, we managed the subcontractor responsible for budgeting and recommending the necessary capital improvements for the theater, estimated in the range of \$10 to \$20 million.

JLL led the process to bring new revenues through a comprehensive RFP process that required a significant financial commitment from the proposers. This process led to the City's decision to self-operate the facility. This change has resulted in increased revenues by over \$2 million annually since opening the venue to multiple promoters.



Similar Projects

South San Francisco

Market and Financial Feasibility Study

JLL worked in two phases to provide a market and financial feasibility study for the City of South San Francisco Conference Center Authority. The initial scope of the project was to provide counsel and direction on how the City could renovate and expand their existing conference center. The City wanted to ensure the resulting renovation/expansion made the highest and best use of the facility to generate increased overnight visitation. JLL worked through a process with the City to identify the potential outcome of maintaining the center for meetings and conferences, renovating the facility for primarily sports tourism uses, and envisioning a hybrid of the two.

The initial phase of the project entailed thorough research and analysis to understand gaps in the market, areas of competitiveness, and destination attractiveness. Phase two of the engagement built on the Market Analysis and provided the client additional demand projections, as well as creating legislation to request a funding stream. JLL also engaged with the surrounding hotels to ensure the room supply could support the facility and developed a rendering of the mixed-use option. Lastly, JLL provided direction on a potential public-private partnership to operate the facility.



Santa Clara

Re-Organization, Positioning & Convention Center Restructuring

JLL has worked with the City of Santa Clara since 2018 to develop and implement a renewed and comprehensive tourism strategy to increase sustainable economic growth and development and increase visitor and group business in Santa Clara. The teams focus included organizational development; strengthening operations and service delivery; policy development; sales and marketing efforts; and enhancing collaboration with all stakeholders. Through this process, JLL was able to identify key niches and gaps that help differentiate the Santa Clara community and its tourism assets from other destinations.

Similar Projects

Lake County

Destination Planning

JLL, through its predecessor firm, Strategic Advisory Group worked with Lake County to create a Tourism Plan. The rural county of Lake County required comprehensive stakeholder engagement across a broad geographic area. The strategic planning effort also centered around the county's natural resources and proximity to visitor populations. JLL delivered a successful strategic plan and was invited back in 2017 to facilitate an update.



Carlsbad

Tourism Study

JLL completed a Tourism Industry Study and a Strategic Action Plan for tourism efforts in the City of Carlsbad, California. The goal was to provide City leadership with a long-range plan to boost Carlsbad's performance as a coastal California destination. The project involved a deep tourism analysis, as well as industry outreach to develop a stakeholder supported tourism marketing plan.

We conducted extensive stakeholder outreach, speaking to over 50 Tourism partners. Through a Lifestyle Segmentation Analysis, we were able to develop key feeder markets and target segments in both the regional, drive-in market and fly-in markets. We developed a monitoring process that focused on performance of sales and marketing efforts. Our recommendations related to opportunities to continue to enhance the overall visitor experience including the development of a transportation system connecting key interest points; creating a new experience using an existing lagoon; additional meeting facilities; developing the Village central business district; and enhancing the beach camping experiences.

Similar Project

Raleigh

Destination Planning for Raleigh/Wake County, North Carolina

The Greater Raleigh Convention and Visitors Bureau selected JLL to orchestrate a 5-year Destination Strategic Plan. The planning initiative sought to provide a unified vision for the destination's future across the entire county. All 13 municipalities were engaged along with input from over 1,800 stakeholders to help construct the final plan.

The process analyzed convention center optimization, product development opportunities and funding priorities. JLL worked with the marketing team to assess current activities and ensure that the plan results could be directly leveraged to enhance marketing efforts going forward.

The Destination Strategic Plan included clearly stated recommended action steps within the identified priorities designed to grow total visitation to the destination. Each town was presented a separate tourism mini-plan related to where the municipalities' assets aligned with the plan's priorities. The future path to business success and renovations/expansions were highlighted for Raleigh's major public-use.



Similar Project

Indiana

State of Indiana Strategic Planning Process

JLL was brought on board to manage a statewide strategic planning process which led to the reorganization and creation of a new state tourism agency - the Indiana Destination Development Corporation (IDDC). The goal of the strategic planning process that was undertaken by the Indiana Destination Development Corporation (IDDC) was to surface priorities and recommend a path forward to further the mission of attracting and retaining talent, retaining graduates from Indiana higher education institutions and attracting new visitors and converting them into new residents of the state.

Our team, with the support of a subcontractor and longtime research partner, conducted detailed research and analysis on the State of Indiana's assets, understand stakeholder needs, visitor perceptions and set goals as an organization to support and grow the industry. After analyzing the research results collaboratively, JLL produced a 3-year strategic plan for the IDDC with specific strategies, tactics and overall goals with KPIs to move the organization and statewide destination forward.

JLL worked closely with the Lieutenant Governor's office to not only support the creation of the IDDC, but to immediately begin working with the new entity, its Board and President. This effort was collaborative across different divisions of state government and including transferring existing employees from the Visit Indiana Office of Tourism. Timelines and resources were outlined and JLL used a timeline and progress report in each check in to manage the transition and prevent any risk related to having the new IDDC entity transition slip. JLL managed our work with the IDDC beyond formation similarly with tools for project management and scheduling to manage regional listening sessions across Indiana in an efficient and streamlined manner.



Similar Project

Louisville

Destination Master Plan

Louisville Tourism selected JLL to develop a 10-year Destination Strategic Plan. The plan's process looked across the entirety of the destination landscape to identify new opportunities for future positioning and development. This kind of initiative had never been done in Louisville before.

The outcome unified stakeholders and the broader industry on the key priorities as well as set the vision for the destination's development. The Plan made recommendations in seven priority areas each with action steps and milestone achievements for the Louisville Tourism team to target for success in implementation.

In addition to the Destination Strategic Plan, JLL was also engaged to conduct an organizational review and a convention center optimization analysis in parallel with the primary study. The outcomes of the organizational review aligned the Louisville Tourism team with the recommendations of the Plan to manage a successful roll out. It also identified where there might be additional needs for team resources. Additionally, the convention center optimization analysis set goals for a 5–7-year period to grow the Kentucky International Convention Center's production and impact on the business community and grow revenues to \$10 million.

These initiatives complemented each other for implementation.



Strategic Planning Experience

JLL's stakeholder-driven and data backed, strategic planning process produces plans that energize our clients through innovative direction, inspire their stakeholders to greater levels of support through their engagement and emboldens their communities to overcome destination deficiencies. As shown in our client list below, we have provided strategic planning services for **over 60 destinations.**

- Little Rock
- Front Royal
- Rochester
- Pompano Beach
- Panama City
- Manhattan
- Kansas City
- Greenville
- Annapolis
- Amelia Island
- Fort Worth
- Raleigh
- Lynnwood
- Santa Clara
- Istanbul
- Philadelphia
- Houston
- San Francisco
- Miami Beach
- Denver
- Charlotte
- Atlantic City
- Lake County
- Carlsbad
- Coronado
- South San Francisco
- Indiana
- St Mary's County
- Broward County
- Los Angeles
- Galveston Island
- Waco
- Frisco
- San Antonio
- Texas
- Hawaii
- Pierce County
- Portland
- Fort Collins
- Crested Butte
- Walton County
- Sarasota
- Jacksonville
- Cary
- Morgan Hill
- Volusia County
- Snohomish County
- Puerto Rico
- Finger Lakes
- Orlando
- West Palm Beach
- Fort Myers
- Shreveport
- New Orleans
- Avondale
- Sugarland
- Lubbock
- Louisville
- Columbus
- Madison
- Des Moines
- Destinations International
- World Travel & Tourism Council
- Uruguay
- Ithaca
- Costa Rica
- WEF

Convention Center Industry Experience

From providing long-range strategic planning, asset management, feasibility assessments, financial advisory services, pre- development and development services, or operational improvement, our firm is recognized as a convention industry leader. As shown in our client list below, we have provided advisory services for **over 100 convention, conference and civic centers.**

- Akron Convention Center
- Alabama Gulf Coast Conference Center
- Albany Convention Center
- Albert B. Sabin Convention Center
- Alpharetta Convention Center
- Alton Conference Center
- Amarillo Civic Center
- Asheville Civic Center
- Augusta Convention Center
- Aurora Conference Center
- Baltimore Convention Center
- Banks County Conference Center
- Birmingham Conference Center
- Burlington Convention Center
- Carteret County Convention Center
- Charlotte Convention Center
- Classic Center, The – Athens, GA
- Cobb Galleria Centre
- COBO Conference & Exhibition Center
- Colorado Convention Center – Denver
- Colorado Springs Convention Center
- Columbia Metropolitan Convention Center
- Columbus Iron Works
- Crown Coliseum Complex
- Ernest N. Morial Convention Center
- Expoland Malaysia
- Frank Mayborn Convention Center - Florida
- Garland Conference Center
- Gary Convention Center
- George R. Brown Convention Center
- Greater Columbus Convention Center
- Greenville/Pitt County Convention Center
- Greenwood Conference Center
- Indiana Convention Center
- Irving Convention Center at Las Colinas
- Jackson Township Conference Center
- Jacksonville Convention Center- Florida
- Jacob K. Javits Convention Center
- John B. Hynes Convention Center
- Johnston County Conference Center
- Kalahari Resort & Convention Center
- Kansas ExpoCentre
- Lancaster Convention Center - Pennsylvania
- Liberty Conference Center
- M.C. Benton, Jr. Convention and Civic Center
- Manhattan Conference Center
- Mayo Civic Center – Rochester, MN
- McCormick Place Chicago
- Meydenbauer Center – Bellevue, WA
- Miami Beach Conference Center
- Miami Beach Convention Center
- Montgomery Conference Center
- Mountain Lakes Conference Center
- Myriad Convention Center
- Myrtle Beach Convention Center
- Navy Pier Chicago
- Norfolk Convention Center
- North Charleston Convention Center
- Northwest Georgia Trade & Convention Center
- Oconee County Conference Center
- Orlando Downtown Convention Center
- Orlando/Orange County Convention Center
- Osceola County Conference Center at Reunion Resort
- Overland Park Convention Center
- Pennsylvania Convention Center
- Portman Conference Center
- Prime F. Osborn Convention Center
- Queen Sirikit Convention Center (Bangkok)
- Raleigh Convention/Civic Center
- Richardson Galatyn Park Conference Center
- Richmond Center for Conventions and Exhibitions
- Riyadh Trade Mart and Convention Center
- Saint Paul RiverCentre
- San Jose McEnery Convention Center
- San Juan Convention Center
- Sarasota Convention Center
- Schaumburg Convention Center
- Schenectady Convention Center
- Seaside Convention Center
- Shreveport Convention Center
- St. Louis Cervantes Convention Center/ Stadium
- South San Francisco Conference Center
- Sugar Land Convention Center, TX
- Summerville Civic Center, SC
- TD Convention Center- SC
- Toronto Exhibition Place Trademart & Exhibit Hall
- Trenton Conference Center
- Tuscaloosa Convention Center
- Vancouver Convention & Exhibition Centre
- Washington Convention Center, DC
- Wausau Convention Center
- Wildwood Convention Center , NJ
- Williamsburg Convention Center
- Wilmington Convention Center
- Winchester Conference Center, VA

Tourism Advisory Experience



Visit Savannah: Tourism Future Study

Utilized stakeholder engagement and surveying to identify leading trends – both current and future – and prioritize goals, leading to a comprehensive strategic plan.



Destination Cleveland: Tourism Master Plan Review and Benchmarking

Aligned purpose of the DMO with the purpose of the visitor as a foundation for branding/identity; identified goals for tourism growth with mission, organizational structure, and operations; created an implementation process, including tactics, timeline, and indicators.



New York State: Sustainable Lodging Development Strategy

Worked for a state entity on a project encompassing a wide geography with rural, town, and urban communities; assessed lodging and tourism product and markets and developed an actionable plan for attracting investment under a sustainable framework.



Greater Miami Convention & Visitors Bureau: Strategic Tourism Plan

Created a comprehensive 5-year strategic plan through stakeholder engagement, consumer research, and benchmarking best practices, with a focus on marketing, brand strategy, demand segmentation, and product development.



Lower Manhattan, New York: Tourism Recovery Strategy

Relevant with respect to scope – a comprehensive strategy to grow tourism – as well as the timing during recovery from an unprecedented crisis; involved wide stakeholder engagement, including residential community boards, as well as on-site surveying of thousands of visitors.



Massachusetts Office of Travel and Tourism: Economic Impact of Tourism Study

Interpreted visitor data and economic impacts from tourism to develop an organizational business plan for the DMO to better unlock the value of tourism.



Bermuda Tourism Board: Governance Plan and Implementation

Implemented organizational redesign and created a highly effective tourism organization via actionable strategic recommendations for governance, organizational structure, human resources, policy, finance, goals, indicators, services, and operational systems.



Dominican Republic: Strategic Tourism Plan

Engaged to assist the US Agency for International Development, in the development of a strategic tourism plan to enhance visitation and perception of the Dominican Republic as a tourism destination, and attract high-value tourism.



PROJECT TEAM PERSONNEL

Project Staff

Meet Our Team.

JLL, as the primary corporate entity, will be responsible for project oversight, day to day management and execution. JLL’s Tourism & Destination Advisory team will lead the effort to address all 12 regions in a professional and consistent manner. JLL has assembled additional experts to join our team as subcontractors. Our best-in-class firm will manage the entirety of the process and delineate where subcontract expertise will be applied.

Tourism Strategy Team



Gilda Perez-Alvarado
Global Chief Executive Officer
JLL
Project Role: Project Oversight and Global Hospitality Expertise



Dan Fenton
Executive Vice President
JLL
Project Role: Project Oversight and Strategy



Bethanie DeRose
Senior Vice President
JLL
Project Role: Project Manager



Brian Tress
Senior Strategy Advisor
JLL
Project Role: Sustainability Strategy Advisor



Juliet Velázquez
Associate
JLL
Project Role: Project Support



Mitchel Anzivino
Associate
JLL
Project Role: Project Support



Bernadine Galliver
Vice President
JLL
Project Role: Project Support

Project Staff

Meet Our Team.

Global Expertise



Nashunda Williams

Global Head of Diversity,
Equity & Inclusion
JLL



Jubal Smith

Location Services
JLL



Guy Grainger

Global Head of
Sustainability Services
JLL



Sarah Mancuso

Northern California
Market Lead
JLL



Peter Belisle

Southwest Region
Market Director
JLL



Julia Georgules

Head of Americas
Research & Strategy
JLL



Josephine Tucker

Managing Director, Clean
Energy & Infrastructure
Advisory
JLL



Alexander Quinn

Director of Research,
Northern California
JLL

Statewide Expertise

Gilda Perez- Alvarado

Global Chief Executive Officer



Gilda Perez-Alvarado is the Global Chief Executive Officer of JLL Hotels & Hospitality, where she is responsible for investment sales, debt and equity placement, strategic advisory and asset management across three global regions: Americas, EMEA and Asia Pacific. Gilda leads the group's Global Hotel Desk, a specialized team of cross-border investment sales professionals based in the Middle East, Asia Pacific, the Americas and Europe. Previously, Gilda served as CEO, Hotels & Hospitality Americas. Gilda also serves as a member of JLL's Global Capital Markets Advisory Group and on the Global Advisory Board of Qiddiya, a PIF-funded giga project in Saudi Arabia. In January 2016, she became the recipient of the Jack A. Shaffer Financial Advisor of the year award at the Americas Lodging Investment Summit. Gilda is also an active member of IREFAC and of Cornell School of Hotel Administration Dean's Advisory Board.

Gilda received her Masters in Business Administration degree from Instituto de Empresa (IE Business School) in Madrid, Spain in 2010. In 2002, Gilda received her Bachelor of Science degree from the Cornell School of Hotel Administration in Ithaca, New York, where she graduated with Honors and served as Degree Marshall for her graduating class. Her specialization was in hotel real estate finance. Gilda has also attended Executive Education Courses on Competitive Strategy and Leadership at INSEAD and Stanford School of Business, respectively.

Member of the Board of Trustees for:



Cornell University



Industry Real Estate
Financing Advisory Council

Dan Fenton

Executive Vice President + Director of Global Tourism

Dan heads up the Global Tourism Team within JLL's Hotels & Hospitality Group specializing in research, tourism strategy and destination planning. He is the past Chairman of the Board of Destinations International where he launched several initiatives designed to drive more effective practices across Destination Marketing Organizations.



KEY SECTOR EXPERIENCE

Destination Master Planning

Tourism Strategic Planning

Tourism Asset Planning

Destination Venue Planning & Feasibility

Placemaking

Market Segmentation & Identification

Stakeholder Alignment

Tourism Organization Visioning and Structure Advisory

EDUCATION + AFFILIATIONS

Cornell University
Bachelor's Degree in Hospitality Administration and Management
York School Board of Trustees

LENGTH OF TIME IN THE INDUSTRY

20+ Years

KEY PROJECTS

- Amelia Island Convention & Visitors Bureau
- Charlotte Regional Visitors Authority
- Costa Elena Development Advisory
- Destinations International
- Discover Coronado
- Discover Santa Clara
- Finger Lakes NY Regional Tourism Council
- Fort Worth Convention Center
- Greater Raleigh Convention & Visitors Bureau

KEY EXPERIENCE

Dan blends his knowledge of trends in the national and international tourism and hospitality sectors to bring a "big picture" view to what makes destinations more competitive and how communities can set themselves apart. This knowledge was thoroughly applied to help develop the Meet Hawai'i brand and direction. With this perspective, he understands what questions need to be asked and uses that context to evaluate and leverage the resulting data. Before joining JLL, Dan was a Principal for Strategic Advisory Group, which was acquired by JLL in early 2016, for five years. Prior to joining Strategic Advisory Group, he served as President and CEO of Team San Jose for 15 years.

- Hawai'i Tourism Authority
- Houston Convention & Visitors Bureau
- Little Rock Convention & Visitors Bureau
- Lynwood Public Facilities District
- Miami Beach Convention Center
- Philadelphia Convention & Visitors Bureau
- Pompano Beach Cultural Tourism Plan
- Raleigh Convention Center
- Rochester MN Convention & Visitors Bureau

- St. Mary's County, Maryland
- Visit Denver
- Visit Greenville SC
- Visit Sarasota County
- Walton County Florida
- World Travel & Tourism Council – Tourism Readiness Research

Bethanie DeRose

Senior Vice President, Tourism + Destination Development

Based in New York, Bethanie DeRose is a Senior Vice President with JLL's Hotels & Hospitality Group specializing in tourism strategy, destination development and management. She assists clients with destination strategic planning, tourism readiness and sustainability, convention center asset management, public facility feasibility and overall destination positioning.



KEY SECTOR EXPERIENCE

Destination Master Planning

Tourism Strategic Planning

Tourism Asset Planning

Destination Venue Planning & Feasibility

Placemaking

Market Segmentation & Identification

Stakeholder Alignment

Tourism Organization Visioning and Structure Advisory

EDUCATION + AFFILIATIONS

Rutgers University
Bachelor's Degree in Communications
Certified Destination Management
Executive, Destinations International

LENGTH OF TIME IN THE INDUSTRY

10+ Years

KEY PROJECTS

- Amelia Island Convention & Visitors Bureau
- Charlotte Regional Visitors Authority
- Costa Elena Development Advisory
- Destinations International
- Discover Coronado
- Discover Santa Clara
- Finger Lakes NY Regional Tourism Council
- Fort Worth Convention Center
- Greater Raleigh Convention & Visitors Bureau

KEY EXPERIENCE

Bethanie has extensive experience in long-term destination and tourism planning efforts having completed over 50 projects domestically for destinations. Internationally, Bethanie has been involved in convention center planning in Central America and global tourism readiness planning in Europe and Asia. Bethanie has also worked closely with industry associations including the World Travel and Tourism Council on a Global Tourism Readiness project as well as Destinations International on the conventions and meetings product audit. She also serves on various Destinations International committees.

- Hawai'i Tourism Authority
- Houston Convention & Visitors Bureau
- Little Rock Convention & Visitors Bureau
- Lynwood Public Facilities District
- Miami Beach Convention Center
- Philadelphia Convention & Visitors Bureau
- Pompano Beach Cultural Tourism Plan
- Raleigh Convention Center
- Rochester MN Convention & Visitors Bureau

- St. Mary's County, Maryland
- Visit Denver
- Visit Greenville SC
- Visit Sarasota County
- Walton County Florida
- World Travel & Tourism Council – Tourism Readiness Research

Brian Tress

Senior Strategy Advisor

Brian is a Senior Advisor to JLL's Global Tourism & Destination Advisory team, with nearly three decades of advising clients in tourism and hospitality investment and strategy. Brian's focus is advising global tourism entities, government ministries, global destination development initiatives and economic development groups on destination strategy, tourism planning, destination development and tourism operational diligence. Prior to working with JLL, Brian led Ernst & Young's Global Tourism & Destination Advisory solution and Northeast Hospitality Advisory practice.



KEY SECTOR EXPERIENCE

Destination Master Planning

Tourism Strategic Planning

Tourism Asset Planning

Placemaking

Sustainability Strategy

EDUCATION + AFFILIATIONS

Cornell University
Bachelor's Degree in Hotel Administration
Brian was an Assistant Adjunct Professor for Columbia University's Master of Science program in Real Estate Development and an Instructor for NYU's Hospitality & Tourism Professional Studies program.

LENGTH OF TIME IN THE INDUSTRY

20+ Years

KEY PROJECTS

Convention & Sports Venues, Attractions:

- Inter-American Development Bank
- Quebec City
- NYC EDC/NY Jets
- Vietnam Veterans Memorial Fund
- Univ. Miami / Frost Science Museum
- Rutgers University

Destination Strategy:

- Israel Ministry of Tourism
- Haifa Tourists Board, Israel
- Yas Island, Abu Dhabi
- Ministry of Tourism of Saudi Arabia
- Office of HRH, Dubai
- I Love NY
- Empire State Development (NY State)
- World Bank
- Rhode Island Dept. of Transportation

Other Clients—Strategy & Market Analysis:

- Major international hotel brands
- Hotel management companies
- Hotel owners/investors/developers
- Restaurant companies
- Family-owned business
- Entrepreneurs
- Sovereign Wealth Funds

KEY EXPERIENCE

Brian leverages his significant experience and wide perspective in providing holistic solutions for tourism clients. His projects have taken him to five continents, ranging in scope from small cities to entire countries. Brian believes tourism strategy must be purpose-driven, enabling clients to define and prioritize their goals, develop and implement the tools to reach those goals, and monitor performance against them. Foundational to his work is identifying the area of overlap between visitors, investors and communities, in order to design the optimal strategy. Before advising JLL, Brian led Ernst & Young's Global Tourism & Destination Advisory solution and the Northeast U.S.'s Hospitality Advisory practice, where he was responsible for implementing pursuits and projects in over 20 countries for public- and private-sector clients.

Juliet Velázquez

Associate, Tourism and Destination Development

As part of the Strategic Advisory and Asset Management team with JLL's Hotels & Hospitality Group, Juliet Velazquez assists clients with developing strategic plans for destination growth, developing ways to optimize the effectiveness of tourism assets and overall destination positioning.



KEY SECTOR EXPERIENCE

Destination Master Planning

Tourism Strategic Planning

Tourism Asset Planning

Destination Venue Planning & Feasibility

Placemaking

Market Segmentation & Identification

Stakeholder Alignment

Tourism Organization Visioning and Structure Advisory

EDUCATION

Florida International University
Bachelor's Degree in
Communications and Public Relations

LENGTH OF TIME IN THE INDUSTRY

9+ Years

KEY PROJECTS

- Amelia Island Convention & Visitors Bureau
- Costa Elena Development Advisory
- Discover Coronado
- Discover Santa Clara
- Fort Worth Convention Center
- Little Rock Convention & Visitors Bureau
- Lynwood Public Facilities District
- Miami Beach Convention Center
- Pompano Beach Cultural Tourism Plan
- Raleigh Convention Center
- Visit Greenville SC
- WTTC Index

KEY EXPERIENCE

As a marketing strategy professional, Juliet is proficient in identifying and organizing high-level strategies into actionable steps. She has worked closely with industry associations including the **World Travel and Tourism Council**, through the Global Tourism Readiness project as well as **Destinations International** on the Global Leadership Committee, Convention Sales and Services Committee, and Event Impact Calculator Product Development Committee. In addition, she was the recipient of the **Destinations International 30 Under 30 Award**.

In her previous role, Juliet served at the Greater Miami Convention and Visitors Bureau (GMCVB) providing business analytics expertise to the Convention Sales team. Prior to the GMCVB, she served as a Public Information Specialist for the City of Miami Beach focusing on Marketing and Communications as Editor of MB Magazine.

Mitchel Anzivino

Associate, Tourism and Destination Development

Mitchel Anzivino is an Associate with JLL's Hotels and Hospitality Group since June 2021, specializing in tourism strategy, destination development and management. His role includes collaborating with clients to organize data to build strategy and produce optimized recommendations. In addition, he assists clients with tourism readiness and sustainability, public facility feasibility, convention center asset management, overall destination strategic planning and destination positioning.



KEY SECTOR EXPERIENCE

Destination Master Planning

Tourism Strategic Planning

Tourism Asset Planning

Destination Venue Planning & Feasibility

Placemaking

Market Segmentation & Identification

Stakeholder Alignment

Tourism Organization Visioning and Structure Advisory

EDUCATION

New York University
Bachelor's Degree in Hospitality
and Tourism Management

LENGTH OF TIME IN THE INDUSTRY

4+ Years

KEY PROJECTS

- Amelia Island Convention & Visitors Bureau
- Costa Elena Development Advisory
- Discover Coronado
- Discover Santa Clara
- Fort Worth Convention Center
- Little Rock Convention & Visitors Bureau
- Lynwood Public Facilities District
- Pompano Beach Cultural Tourism Plan
- Raleigh Convention Center
- Visit Greenville SC
- WTTC Index

KEY EXPERIENCE

Joining the JLL team in June 2021, Mitchel brings multiple years of hospitality and tourism experience. He has comprehensive knowledge in asset utilization, capital planning and due diligence support having recently completed domestic projects for Las Vegas, Nevada; and Dallas, Texas. Internationally, Mitchel has improved financial and operational performance of luxury hotels throughout Riyadh, Saudi Arabia; Amman, Jordan; Kuwait City, Kuwait and London, England by enhancing management operating systems, forecasting strategies, and brand positioning.

Mitchel also continues to collaborate with the World Travel and Tourism Council on creating a standard for Global Tourism Readiness. He is skilled in interpreting and organizing data from several sources to deliver analytics that both build strategic insights and drive optimizations for clients.

Before joining JLL, Mitchel was a consultant at Carpedia Hospitality for 2 years, an implementation-based consultancy focused on improving operational performance while enhancing the guest and employee experience.

Bernadine Galliver

Vice President, Head of Tourism Advisory, Africa

Based in South Africa, Bernadine is a Vice President with JLL's Hotels & Hospitality Group specializing in tourism strategy, destination development and management. She leads our tourism advisory practice in Africa.



KEY SECTOR EXPERIENCE

Destination Master Planning

Tourism Strategic Planning

Tourism Asset Planning

Destination Venue Planning & Feasibility

Market Research & Marketing Insights

Economic Impact Assessment

Tourism Organization Visioning & Structure Advisory

EDUCATION + AFFILIATIONS

BSc (Ecological Science), BSc Honours (Wildlife Science), MScAgric (Agribusiness), Post-graduate Certificate in Business Administration, Certificate in Environmental Law, MBA (awaiting graduation)

LENGTH OF TIME IN THE INDUSTRY

15+ Years

KEY PROJECTS

- Kenya National Tourism Strategic Blueprint 2030
- Eastern Cape Tourism Development Strategy (South Africa)
- Durban Visitor Marketing Strategy (South Africa)
- KwaZulu-Natal Tourism Master Plan (South Africa)
- Gauteng Provincial Tourism Institutional Framework (South Africa)
- Knysna Tourism Business Plan (South Africa)
- Tourism Research Plan for Limpopo Tourism (South Africa)

KEY EXPERIENCE

Bernadine has extensive experience in destination strategic planning, economic impact assessments and market and financial feasibility studies. Before joining JLL, Bernadine spent 13 years at multi-national audit and advisory firms, and other specialist tourism consultancies prior to that. She has worked with government ministries/departments and economic development/tourism entities, developers, lenders, tourism and trade associations, hoteliers and communities across the tourism value chain.

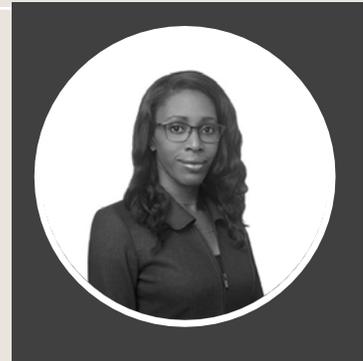
- Free State Tourism Marketing Strategy (South Africa)
- Emnambithi / Ladysmith Municipality Tourism Strategy (South Africa)
- iLembe Municipality Tourism Development & Marketing Strategy (South Africa)
- Dannhauser Municipality Tourism Plan (South Africa)
- Newcastle Tourism Development & Marketing Strategy (South Africa)
- uMgungundlovu Municipality Tourism Strategy (South Africa)

Global Experts



Nashunda Williams

Nashunda has been a leader at JLL for the past six years, first as a technology advisor for the Work Dynamics business and, most recently, as an IT business partner within JLL Technologies (JLLT). She has worked with dozens of JLL clients across multiple industries, helping them design and implement technology strategies and solutions. She also has been deeply involved in JLL's DEI initiatives, leading the Empower-Black Professionals Network in the U.S. for several years and founding and heading JLLT's global diversity and inclusion committee. Prior to JLL, Williams worked with multinational companies and diverse teams as a business solutions leader at CRSGroup and in technology management roles at Allstate. She also served in a volunteer capacity as the marketing and engagement director for BDPA, an organization focused on developing diverse work professionals and future leaders in IT and STEM. She earned a bachelor's degree in information systems from Howard University's School of Business



Guy Grainger

Guy Grainger is Global Head of Sustainability Services and ESG at NYSE-listed real estate services company JLL. He has overall responsibility for sustainability services, products and strategy, and for JLL's corporate sustainability program. Previously, Guy led the EMEA region since June 2016, also serving as a member of JLL's Global Executive Board. Prior to that, he was CEO of the UK business between 2013 and 2016, having originally joined as a senior leader of the Churston Heard business acquired by JLL in 2008. Outside of JLL, Guy is Chair of the Circular Economy Taskforce at responsible business organization Business in the Community and Vice President at the British Property Federation.



Jubal Smith

Jubal is a Managing Director and leader of JLL's Location Economics Practice where he leads a team of geographic location and finance professionals. Jubal's leadership and experience secures effective financial incentives and offers site location counsel to global companies across all industry sectors. He has led business incentive negotiations and site selection for some of the largest and most impactful projects in the U.S. for 23 years, including a multi-billion dollar semiconductor manufacturing plant, a major automotive assembly facility, a state of the art aerospace manufacturing facility, Fortune 500 headquarter relocations, and a five thousand employee financial service center.



Global Experts



Sarah Mancuso

Sarah oversees 8 JLL corporate offices throughout the entire Northern California region. Her responsibilities include bolstering the tenant rep, agency leasing, property management, and project management businesses, with industry focuses such as office, industrial, retail, hospitality and multifamily. In her nearly 20 years in the industry, Sarah has experienced how the dynamic nature of real estate creates unique opportunities for investors and clients alike. Sarah is passionate about developing solutions and executing wins for clients and colleagues. Prior to JLL, Sarah was a director at Harvest Properties, managing property management activities, investment strategy, and overseeing construction for capital projects.



Julia Georgules

Julia is responsible for guiding the strategic vision and organization of the Americas' 200-person Research team, which includes the United States, Canada and Latin America. She is a member of the Global Research Executive Board and closely collaborates with JLL's EMEA and APAC regions to bring the best of JLL's research to its global and national clients. In her 15-year career with JLL, Julia has held a variety of roles within the Research organization. She began her career with the Staubach Company in San Francisco, taking on research responsibilities in the Bay Area after its acquisition by JLL in 2008. Since that time, Julia has led JLL's U.S. office research platform, co-founded and led JLL's U.S. technology research practice and launched multiple national research programs and initiatives.



Alexander Quinn

Mr. Quinn is the Director of Research for Northern California at JLL. He has over 20 years of planning and economic analysis experience and specializes in real estate development, economic forecasting, and urban regeneration. His practice has focused primarily on addressing urban questions using robust analytic methods to inform the economic, equity, and environmental consequences of development and policy. Mr. Quinn has applied triple bottom line assessment, sustainable return on investment modeling, and life-cycle analysis to projects across North and South America. He combines his considerable quantitative skills with an extensive background in sustainability, urban regeneration, economic development, transit-oriented development (TOD), and public finance.



Global **Experts**



Peter Belisle

As Market Director, Peter Belisle is charged with overseeing the firm’s business across the Southwest region, which includes Las Vegas, the Los Angeles area, Orange County, Phoenix, and San Diego. Business lines under Peter’s direction include tenant representation, agency leasing, project management, and a property and facilities management portfolio of 62 million square feet. Peter is committed to retaining, attracting and rewarding the best people in the industry, fostering enduring client relationships and diversity at all levels of the firm with energy management and environmental sustainability services key long-term objectives for the region.



Josephine Tucker

Josephine Tucker is Managing Director, Clean Energy and Infrastructure Advisory for JLL and has more than 15 years of experience working domestically and internationally across the transportation, energy, water, and real estate sectors. In her role, Josephine helps education and government clients seek economic growth that sparks community vitality and productive real estate assets. As an economist and financial services leader, she has spearheaded numerous strategic business initiatives including acquisition targeting, new market entry, product expansion and partnership development. Josephine brings a wide range of sustainability expertise to the table having worked on clean energy and infrastructure projects across federal, state and local entities, including intelligent transportation initiatives, smart city commercialization, EV charging, fleet and micro mobility to name a few. In addition, Josephine has published articles concerning smart cities, public-private investments, and social impact investments. As part of JLL’s Public Institutions practice, Josephine will advise and implement programs from clean energy and transportation, to environmental and social infrastructure to help clients address aging infrastructure and deliver climate-resilient and energy-efficient infrastructure.



Conflict of Interest

We have reviewed your RFP and confirm that there are no existing no conflicts of Interest between any existing contracts.

Other business units and personnel of Jones Lang LaSalle advise and represent various and changing owners and investors regarding commercial property in the relevant area and will continue to do so including under pre-existing contracts. Based on the information currently available regarding the scope and subject of our services under this contract, we believe no actual conflicts of interest exist, but Jones Lang LaSalle cannot determine at this time whether any of these other engagements might pose a potential conflict. Jones Lang LaSalle will make prompt disclosure if any such conflicts become apparent in the future and take reasonable actions necessary to mitigate such conflicts to the State's satisfaction (such as establishing conflict wall procedures in addition to the Contract's confidentiality requirements and at Jones Lang LaSalle's discretion, terminating the conflicting engagement). The Client may terminate for convenience a conflicting assignment under the Contract if it deems so necessary



PROJECT TEAM SUBCONTRACTORS

JLL has precisely selected globally renowned specialists to deliver expertise.



Project

Subcontractors

Index Partners



Julia Simpson

President & CEO
WTTTC



Virginia Messina

Senior Vice President,
Advocacy & Communications
WTTTC



Nejc Jus

Director of Research
WTTTC

Tourism Planning Partners



Rob Masi

Principal – Real Estate,
Hospitality & Tourism
EY



Robbie Karver

Principal – Real Estate,
Hospitality & Tourism
EY



Ryan Foster

Senior Manager – Real Estate,
Hospitality & Tourism
EY



Amy Horwath

Senior Manager – Real Estate,
Hospitality & Tourism
EY



Tuyen Mai

Senior Managing Director –
Infrastructure Advisory
EY

Marketing Partners



Curtis Zimmerman

Founder
The Zimmerman Agency



Ben Guttman

Principal, Digital Strategy
Unisphere Ideas



Liz Paradise

Chief Creative Officer
The Zimmerman Agency



Andy Jorishie

President / Strategy Director
The Zimmerman Agency

Project

Subcontractors

DEI Partner



Greg DeShields
Executive Director
Tourism Diversity Matters

Research Partners



Adam Sacks
President
Tourism Economics



Erik Evjen
Director of Analytics & Insights
Tourism Economics

Sustainability Partners



Dr. Bijan Khazai
CEO, RiskLayer
Project Role: Resilience Strategy Advisor



Julie Tilley Barlow
Principal Planner
SWCA Environmental Consultants



Mark Brandi
Senior Restoration Ecologist &
Landscape Architect
SWCA Environmental Consultants



Laura Moran
Vice President, Northern California
SWCA Environmental Consultants



Bill Spain
Office Director at SWCA
Environmental Consultants



Geri Lopez
Manager, Economic Development
Advisory Services



Niki Lee
Partner, Organization & Workforce
Transformation Leader

Project

Advisors

JLL is committed to leveraging our extended network in the State of California to benefit this work for Visit California and the regional plans. JLL's presence across the state with 20 offices and nearly 4,300 employees enables our team to have the deepest reach across and within key networks. This includes contacts within leadership at the largest airports and cruise ports, of which are both key industries for stakeholder engagement, as well as developers and investors, landowners, technology companies, entrepreneurial start-ups, quasi-governmental organizations, advocacy groups and many more. Upon selection, JLL will confirm with Visit California the influential members of its Advisory Panel which will be both a resource to extended networks as well as critical to infuse stakeholder input. Sample list of JLL key contact areas include:

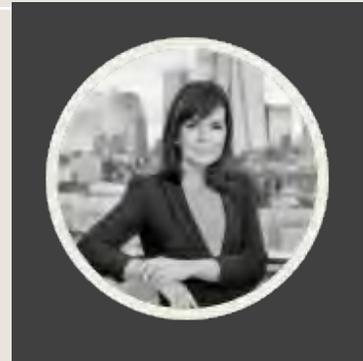
- Long Beach Cruise Terminal
- Port of Los Angeles
- Port of San Diego
- Port of San Francisco
- Cruise Line Industry Association
- Individual Cruise Lines
- Los Angeles International Airport
- San Francisco International Airport
- San Diego International Airport
- San Jose International Airport
- Oakland International Airport
- Sacramento International Airport
- John Wayne Airport
- Additional regional Airports
- Individual Airline Carriers
- Airlines for America Association
- RailPAC
- California Association of Winegrape Growers
- California Attractions and Parks Association
- League of California Cities
- Municipal Management Association of Southern California
- Municipal Management Association of Northern California
- TechCA
- California Technology Council
- California Film Commission
- Entertainment Guilds and Unions and additional Associations

Beyond traditional stakeholders and touchpoints for gathering stakeholder input, JLL has direct contacts with organizations like those listed above, and many more, that we would leverage as needed throughout the engagement.



Julia Simpson

President and CEO of the World Travel and Tourism Council. She spent 14 years in the aviation sector on the Board of British Airways and Iberia and as Chief of Staff at International Airlines Group. Before joining British Airways, Julia was senior adviser to the UK Prime Minister. She held a number of key positions in the UK government and public sector, including Director at the Home Office and Department for Education and Employment; Assistant Chief Executive at the London Borough of Camden; and head of communications at the Communication Workers Union. Julia is on the Board of the London Chamber of Commerce.



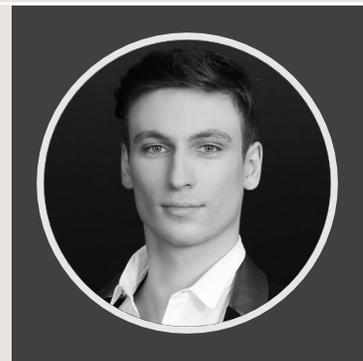
Virginia Messina

With over 15 years of experience Virginia has spent the last decade advocating for Travel & Tourism. She joined WTTC in 2013 as Chief of Staff responsible for driving the strategic plan and was appointed Executive Director of the Global Travel Association Coalition which aligned key industry organizations (ACI, CLIA, IATA, ICAO, UNWTO and WEF) to speak with 'One Voice'. As Senior Vice President, Advocacy & Communications, Virginia oversees WTTC's policy and research, communications, government and industry affairs as well as the delivery of WTTC's strategic priorities such as sustainability and digital solutions amongst others.



Nejc Jus

Nejc Jus is the Head of Research at the World Travel & Tourism Council (WTTC) and is based in London. He is responsible for shaping, leading and implementing the WTTC's research agenda including the economic impact research. The research is a key pillar of WTTC's advocacy and is used to support work in company's strategic priority areas. Nejc is also responsible for building and maintaining relationships with company's research partners. Prior to his role at WTTC, Nejc held various research positions at leading global real estate companies including JLL, Knight Frank and Savills. Nejc holds BA in Land Economy and Management Studies from University of Cambridge and MSc in Environmental Economics from University College London.





Rob Masi

Principal – Real Estate, Hospitality & Tourism

Rob is a Principal in the Strategy and Transactions (SaT) Corporate Finance practice, specializing in the real estate, hospitality, and gaming



KEY SECTOR EXPERIENCE

- Real Estate Advisory Services
- Development feasibility engagements
- Strategy
- Transaction Diligence
- Valuation

EDUCATION

Cornell University
Bachelor's Degree in Hotel Administration
with a concentration in Real Estate Finance
Certified General Real Estate Appraiser in
the State of California

LENGTH OF TIME IN THE INDUSTRY

16 Years

ADDITIONAL INFO

Co-authored several EY thought leadership publications, including the US Lodging Report, the Top Thoughts for the Lodging Industry and the Hawaii Lodging Report, and frequently authors articles on the Las Vegas/Orange County lodging markets for Global Hotel Network.

KEY EXPERIENCE

Rob has provided real estate advisory services for a variety of asset types through the US, including hotels/resorts, casinos, industrial, multifamily, office, retail, and non-traditional real estate assets (healthcare, manufactured housing, timber, agriculture / vineyard and digital real estate such as data centers, cell towers, small cells, and fiber). Further, Rob serves as the real estate valuation liaison for key audit clients in the West Region and is responsible for reviewing real estate valuations for all real estate asset types. Rob has been involved with numerous global real estate and lodging transactions and has led the buy-side diligence process for acquisitions of complex institutional real estate portfolios. He has completed numerous market and feasibility studies throughout the US, including assignments for proposed multi-billion-dollar mixed-use real estate developments



Robbie Karver

Principal – Real Estate, Hospitality & Tourism

Robbie Karver is a Principal within the Hospitality and Leisure practice of EY, with experience in the advisory areas of strategic tourism development and planning, commercial mixed-use and hospitality development. He leads EY efforts in the Central US region including Florida for travel and tourism and is the Practice Leader for the firm’s broader hospitality and tourism strategic work in the Caribbean, Mexico, Central America and South America.



KEY SECTOR EXPERIENCE

- innovative and sustainable tourism practices
- Development feasibility engagements
- Destination Planning & Strategic Development
- Business Planning Advisory Services
- Market and acquisition due diligence services
- Valuation Services

EDUCATION

University of Wisconsin-Madison
Bachelor’s Degree in International Business and a degree in Real Estate and Urban Land Economics

LENGTH OF TIME IN THE INDUSTRY

15+ Years

ADDITIONAL INFO

Robbie has completed over 100 strategic feasibility assignments throughout the US and internationally, developing a strong understanding for destination and demand drivers. Additional areas of Robbie’s capabilities include exit-strategy and strategic operational planning assessments and alternatives, individual and portfolio valuations, operational diagnostics, strategic planning, and transaction due diligence, among others

KEY EXPERIENCE

His experience includes having worked with clients such as the Greater Miami Convention & Visitors Bureau, as well as major destination theme parks and cruise lines and the governments/destinations that help market and drive this demand. His specific passion with these projects is to help develop innovative and sustainable tourism practices benefiting both travelers and small to mid-sized businesses impacted by travel and tourism initiatives. Robbie’s broad real estate experience includes participation in projects involving the analysis of single as well as portfolio real estate assets, being highly familiar with multiple asset classes including master-planned mixed-use communities, stand-alone hotels, residential communities, office buildings, industrial facilities, recreational facilities, land development, and other non-core real estate uses.

Robbie has also advised multiple destination marketing organizations, and travel and tourism companies (airlines, hospitality companies, cruise lines, theme park operators) as they consider their expansion into destination development throughout the Americas.



Ryan Foster

Senior Manager – Real Estate, Hospitality & Tourism

Ryan leads Ernst & Young LLP’s Real Estate & Hospitality advisory practice in Boston, Massachusetts. He has more than 15 years real estate, hospitality and tourism experience working across multiple sectors of the industry to provide public and private sector clients with strategic growth solutions.



KEY SECTOR EXPERIENCE

Ryan has prepared a current state assessment and delivered prioritized recommendations for strategic enhancement opportunities for a global destination in the United Arab Emirates. Benchmarked subject destination against global best practices focused on six critical success factors – governance, attractions, authenticity, accessibility, branding/identity, and lodging, resulting in a multi-year strategic roadmap to drive visitation, streamline operations, and maximize marketability. Additionally, he has advised the Massachusetts Office of Travel & Tourism (MOTT) in compiling a diverse data sets to measure visitor expenditure and the impact of tourism at the state and county level.

EDUCATION

Masters in Urban Planning,
Design and Development
Cleveland State University

Juris Doctor
Cleveland Marshall College of Law

Bachelors in Sociology
Gettysburg College

Licensed Massachusetts real estate
broker and broker of record for Ernst &
Young Real Estate Services Company, LLC

Licensed Massachusetts attorney

LENGTH OF TIME IN THE INDUSTRY

15+ Years

KEY EXPERIENCE

Ryan has served as strategic advisor to prominent attraction developer in analyzing the opportunity for developing a new tourism attraction in downtown Boston; focusing on anticipated visitation, customer experience, competitive positioning, financial analysis, ancillary revenue options, location analysis, marketing and branding, and alignment with global travel and tourism trends. He additionally provided strategic advisory services to a performing arts organization in support of their development of a new, world-class performing arts facility; analyzing location options and joint venture partners, understanding market demand, competitive positioning, financial analysis, branding and sponsorship, visitor experience, alternative revenue streams, and projected performance. Ryan has experience in developing strategic growth opportunities for a member-based travel business to better align offerings with evolving and emerging travel to increase membership, enhance revenue, grow user awareness and engagement, and enhance the customer journey. Results focused on broader offerings through a revised platform and business model, new partnerships and partnership arrangements, and a reimaged digital and physical customer experience connecting inspiration with opportunities.



Amy Horwath

Senior Manager – Real Estate, Hospitality & Tourism

Amy is a Senior Manager with EY's Real Estate and Hospitality practice based in Los Angeles. Amy specializes in hospitality but has experience across all commercial real estate asset classes. Amy has led many real estate valuation, development feasibility, financial due diligence, commercial due diligence and market analysis projects during her time at EY.



KEY SECTOR EXPERIENCE

Amy's prior experience to EY is in hospitality and tourism, working for two hotel companies in accounting and finance. Amy has extensive experience in financial reporting, forecasting, budgeting and internal controls in full-service and luxury hotels. Prior to EY, Amy was the Assistant Director of Finance at Montage Beverly Hills, a 201-room luxury hotel located in Beverly Hills, California.

Amy also spent six years at Four Seasons Hotels & Resorts in various operational and finance positions. In addition, she completed multiple task force finance assignments in various Four Seasons properties throughout North America.

EDUCATION

Bachelor of Science, Hotel Administration
Cornell University

LENGTH OF TIME IN THE INDUSTRY

15+ Years

ADDITIONAL INFORMATION

Amy has led multiple buy and sell-side commercial and financial due diligence projects on various hotels under transaction in Southern California. Notable projects completed include a market and financial analysis on a proposed \$300 million hotel/mixed-use development in Orange County, market and financial analysis of a luxury Santa Monica hotel, financial and market analysis of an LAX airport hotel, and a market analysis utilizing a custom statistical regression model for a proposed mixed-use hotel development in Downtown LA

KEY EXPERIENCE

Amy performed a tourism assessment and market analysis for a destination concept in the Middle East. As part of the project, Amy identified opportunities to enhance the destination by assessing critical success factors and performed a benchmarking analysis using comparable destinations to identify best-in-class standards. Additionally, Amy advised on a development strategy for the City of Los Angeles' portfolio of owned and leased properties in downtown LA. Amy was member of the team which delivered a report providing a financial plan and procurement options for the first four phases of a six-phase master plan projected over 10+ years. Amy's analysis included detailed review of potential private retail, multifamily or hospitality real estate development to further enhance the project's financial position.

Amy assisted Honolulu Area Rapid Transit with an analysis of potential ground lease revenue from hotel and multifamily projects to be developed on publicly-owned land parcels adjacent to future transit station areas. The analysis included a market study of hospitality and multifamily projects on Oahu and a subsequent financial feasibility modeling of the development options for the TOD site.



Tuyen Mai

Senior Managing Director – Infrastructure Advisory

Tuyen Mai is a Senior Managing Director with EY Infrastructure Advisors, LLC, an affiliate of Ernst & Young LLP. Serving as EY’s West region infrastructure advisory lead, Tuyen brings approximately 20 years of experience developing and consulting on large-scale capital and redevelopment projects, from transportation to municipal facilities and urban redevelopment.



KEY SECTOR EXPERIENCE

Strategic Planning & Delivery of Infrastructure

Public—Private Partnerships

Municipal Finance

Major procurements and complex transactions

EDUCATION

Bachelor of Science, Hotel Administration
Cornell University

LENGTH OF TIME IN THE INDUSTRY

20 Years

ADDITIONAL INFORMATION

Tuyen’s project experience also includes:

University of California, Davis — Aggie Square Innovation District P3

Regents of the University of California — UC Merced 2020 Project

San Diego State University – Mission Valley Campus

University of Colorado, Boulder — Hotel & Conference Center Project

KEY EXPERIENCE

Office of the City Administrative Officer, City of Los Angeles – Los Angeles Civic Center Masterplan: Served as the financial lead for advising the City of Los Angeles on financial planning and P3 analysis for a master plan for City-owned facilities in the center of civic government in Downtown Los Angeles. After an initial strategic P3 screening report, EYIA delivered a P3 business case analysis for redevelopment of the LA Street Civic Building on the historic LAPD headquarters (Parker Center) site.

City of Los Angeles, Los Angeles Convention Center (LACC) Expansion and Modernization project – Leading the advisory team to the City on all aspects of its exclusive negotiations with Plenary and AEG for a \$1bn expansion of the downtown Convention Center under a P3 delivery model. Currently leading the City’s term sheet negotiations for (i) signage / naming rights agreements and (ii) new parking facilities to be built on City-owned land and privately financed by AEG. Additionally, evaluated the City’s options for upfront monetization of a ground lease term extension on the STAPLES/LA Live Center, adjacent to LACC.



Gerri Lopez

Manager – Economic Development Advisory Services

Gerri has experience leading economic development, affordable housing, community development, and redevelopment efforts including years of work for city and county government. Gerri is a strategic thinker with a results-oriented approach. Her passion and knowledge of developing equitable and sustainable communities, innovative approach to connecting housing and economic development initiatives based on research and data, and experience with public-private partnerships and federal grant administration help client communities achieve more inclusive and prosperous economies.



EDUCATION

Master in City Planning, Massachusetts Institute of Technology
BA in Architecture, Yale University
Certificate in Community Real Estate Development, University of South Florida

LENGTH OF TIME IN THE INDUSTRY

20+ Years

ADDITIONAL INFORMATION

Certified Economic Developer, International Economic Development Council (IEDC)

Urban Land Institute (ULI), member, previous Housing Affordability Chair for ULI Tampa Bay

Enterprising Latinas, Inc. (ELI), board member

KEY EXPERIENCE

Gerri serves as consulting manager in the EDAS practice, which provides comprehensive economic development strategies and services that help communities across the US grow resilient and inclusive communities, working for an array of public and private sector clients including economic development organizations, and state and local governments. She manages project teams consisting of 2-4 or more consultants to develop economic and community development strategies, provide technical assistance on administering federal grants including American Rescue Plan Act and the Infrastructure Investment and Jobs Act. She has led and/or advised on projects for the Indiana Economic Development Corporation, Detroit Regional Partnership, CareerSource Florida and other private clients.



Niki Lee

Partner - Organization & Workforce Transformation Leader

With 20+ years of consulting & industry experience, Niki takes a business vision and makes it reality through sound people and organizational strategies.

To support this, Niki specializes in providing leadership, and advice on the implementation of the optimal operating model, strategic workforce planning, organizational structure and change management strategies; bringing sustainable growth through revenue generation and operational efficiencies.



KEY EXPERIENCE

People and organizational lead in large transaction – Niki steered the CHRO and CFO in the redesign of all ‘shared’ or ‘corporate’ functions including HR, IT, Finance, Revenue Cycle, Supply Chain, Marketing, Legal to allow for exponential growth following three rapid mergers/acquisitions

Change Management and transformation lead – Led the client team to mobilize and manage the development and implementation of a change management framework for a financial services organization. Duties included managing logistics and impact of the project which affected approximately 12,000 users. Niki clearly established a communication process to ensure the program could react to changes required, together with the integration, alignment and coordination of all initiatives that were taking place in a business.

Transformations – Niki partnered with the C-suite of a large agriculture company to transform their business from a North America focused organization to a globally focused organization. Niki recommended an operating model that could scale for their growth, worked with the HR team to develop a workforce strategy plan which included identifying and prioritizing FROM-TO workforce skills and capabilities, addressed labor shortages and designed robust training and knowledge sharing programs. Niki ensured a seamless employee experience through strong leadership and change management programs.

EDUCATION

Bachelor of Business Administration in Human Resources Management, University of Hawai’i

LENGTH OF TIME IN THE INDUSTRY

20+ Years

Partners

Curtis Zimmerman | CEO and Founder

Curtis began his career in account management in Atlanta at the Southeast office of legendary Doyle Dane Bernbach. The Atlanta Business Chronicle soon named him the “Rising Star” in Atlanta’s Advertising Industry. His efforts were rewarded when, at 27, he was named the first partner added in the 20-year history of the city’s largest independent agency. In 1987—with no clients, little money and a strong desire to raise their children in a smaller city—he and his wife Carrie moved to Tallahassee to launch their business. Curtis has been responsible for the growth and development of advertising, digital, and social media as the agency ascended to become one of the largest and most creative in the South. He is considered one of the foremost experts on travel marketing and has personally worked on more than twenty destinations in his career. His experience and commitment to strategy have been the backbone of agency-client planning. He is responsible for the integrated performance of agency teams.

CLIENT EXPERIENCE: Marriott Hotels & Resorts, Domino Sugar, Club Med, AFLAC, Belize Tourism Board, Ritz-Carlton Company, Cayman Islands Tourist Board, Visit Rhode Island, Gold Toe Socks, Wonder Bread, Continental General Tires, Bertram Yacht, Tobacco Free Florida and more.

Andy Jorishie | President / Strategy Director

Andy began his 25-year journey in the advertising business at Young & Rubican NY, where he spent nearly a decade working on some of the agency’s largest brands, including The Walt Disney Company, CitiBank, US Army, and People Magazine. While Y&R was considered an amazing place to establish your foundation in advertising, he took a greater leadership role in strategy when he joined Kirshenbaum Bond & Partners and was responsible for the EFFIE Award-winning Citibank AAdvantage account and Sony’s formidable entrance into the online business. Andy joined The Zimmerman Agency in 2004 and was named Strategy Director in 2012. He is responsible for the creation and development of Momentum, the agency’s proprietary planning process. Andy is truly part of the agency’s unique DNA. His amazing work and dedication were rewarded in 2021 when he was named President of Advertising.

CLIENT EXPERIENCE: American Express, CitiBank, Club Med, Domino Sugar, US Army, AFLAC, Belize Tourism Board, Visit Rhode Island, Pilot Pens, Aruba Tourism Authority, Visit Central Florida, C&N Bank, Marriott’s Autograph Collection, Hunter Fan, Nature’s Own, Sony Electronics and more.

Liz Paradise | Chief Creative Officer

Liz leads the Creative Department at The Zimmerman Agency. She is an industry veteran with nearly three decades of experience working across numerous national and international brands. Previous to The Zimmerman Agency, Liz was the Director, Creative for Walt Disney World in Orlando, Florida, leading the creative across Walt Disney World Parks and Resorts, Disney Cruise Line, Disney Vacation Club and Adventures By Disney. She was also the Executive Creative Director at McKinney. She has not only won virtually every major award in the advertising industry she has served as a judge at the most prestigious shows in the world. Liz is most excited about industry opportunities in evolving social platforms, the rise of Web 3 and knowing that the smartest creative, not the most expensive, is how brands can win.

CLIENT EXPERIENCE: Audi, Nationwide Insurance, ESPN, Belize Tourism Board, Visit Rhode Island, Daytona Beach, Duck Donuts, EAS Nutrition, NASDAQ, Subway, Polaris, Ad Council, Urban Plates, Domino Sugar, Pilot Pens, Norwegian Cruise Line, Capitol Grille, Lands’ End, and more.

DEI

Partner



Greg Deshields | Executive Director

Greg Deshields is the Executive Director of Tourism Diversity Matters and he is a Qualified Tourism/Hospitality and Academic Professional Certified Hospitality Educator (CHE), proficient in developing and implementing plans, strategies, and initiatives specifically designed to raise destinations image for diverse, multicultural travel. DeShields is also an Experienced Certified Diversity Executive (CDE), with demonstrated cultural competence. Prepared to strategically position an organization to remove systemic barriers to inclusion, lead culture change, and transform the brand.

Bijan Khazai (PhD)

Tourism and Destination Resilience Advisor

Bijan is the CEO of Risklayer GmbH and Hotel Resilient, where he is responsible for leading the development of resilience guidelines, standards and technology-enabled solutions for to support the hospitality sector and tourism destinations withstand adversities and make them more resilient, climate friendly and sustainable.



KEY SECTOR EXPERIENCE

Tourism and Hospitality

- Hotel companies (e.g. Intercontinental Group)
- Hotel Associations (e.g. Phuket Hotel Association)
- Ecuador Ministry of Tourism
- Sri Lanka Tourism Development Authority
- Philippines Department of Tourism
- Palestine Ministry of Tourism

Urban Resilience Clients

- Istanbul Metropolitan Municipality
- Municipal Corporation of Greater Mumbai
- Quezon City and Pasig City Government
- Kathmandu Metropolitan City
- Dhaka Municipal Corporation
- Dar es Salaam Municipal Council

EDUCATION

He holds Masters and Doctoral degrees in Civil and Environmental Engineering from the University of California at Berkeley. Bijan was recipient of the Earth Institute Fellowship at Columbia University and carried out interdisciplinary research on post crisis recovery from 2004-2007.

LENGTH OF TIME IN THE INDUSTRY

20+ Years

ADDITIONAL EXPERIENCE

International Consulting

- German Development Cooperation
- World Bank
- AON
- ASEAN
- UNDP
- USAID

KEY EXPERIENCE

Bijan has more than 20 years of experience as a scientist and practitioner in resilience planning, risk reduction and risk assessment, leading international research projects and consultancies for a wide range of stakeholders including communities, tourism destinations, local and national governments, academia, private sector, and civil society. Prior to founding Risklayer and Hotel Resilient, Bijan was a senior scientist and faculty at the Karlsruhe Institute of Technology where he led the “Vulnerability and Risk” transdisciplinary research group and served as Principal Investigator for many EU and international research projects on tourism destination recovery planning, multi-hazard risk assessment, and resilience measurement and monitoring.

- Christian Relief Services
- Earthquake and Megacities Initiative
- EU-Horizon 2020
- IDMC (*Internal Displacement Monitoring*)
- BMBF (*German Federal Ministry of Education and Research*)
- BMWi (*German Federal Ministry for Economic Affairs and Climate Action*)



Adam Sacks | President, Tourism Economics

Adam Sacks is the founder and President of Tourism Economics; an Oxford Economics company dedicated to analytically based consulting to the tourism sector. Over the past 24 years, Adam has worked with hundreds of travel sector clients to address fundamental economic questions. On the public-sector side, Adam has worked with national, provincial/state and local tourism offices throughout the world. He is an authority on measuring the economic impact of tourism activity—both broadly and for specific initiatives and projects. He has advised destinations on tourism investment policy, the effects of proposed entry procedures, tourism taxation, and marketing strategies. He has provided numerous destinations with analysis on market positioning and emerging opportunities.

Adam has consulted with multi-national hotel chains, airlines, aircraft manufacturers, theme parks, resort developers, and retail operators to measure current and future market opportunities. He has presented to numerous corporate strategic planning teams on the threats and opportunities facing their businesses within the projected travel and economic climate. Adam is a compelling and sought-after speaker on issues related to tourism market analysis, the economic impact of tourism and travel-demand forecasting. He also has presented tourism impact results to governments around the world and served three terms on the US Department of Commerce Tourism Advisory Board.

Erik Evjen | Dir. of Analytics & Insights, Tourism Economics

Erik Evjen leads the Analytics & Insights Division of Tourism Economics focused on delivering business intelligence to clients' internal and external stakeholders. A 15-year tourism industry veteran, Evjen has held several positions across the industry and most recently spent five years with the Philadelphia Convention & Visitors Bureau building their first ever internal Research Department. Under his leadership, the department developed several market intelligence reports to aid management and hotel partners in uncovering trends and insights that enhanced the destination's ability to attract meetings, conventions, and sporting events as well as out-of-town visitors.

He currently serves as a Board Member of the Travel & Tourism Research Association, and the Norwegian-American Chamber of Commerce Philadelphia, and is involved with several national tourism committees and initiatives including Destinations International's Advocacy Committee.



Julie Barlow, AICP

Principal Planning Team Lead

Ms. Barlow has over 20 years of experience in community planning and environmental analysis in the public and private sectors. She prepares all levels of environmental planning documents and is skilled in managing high-visibility projects and area plans. She is recognized for working efficiently with staff, clients, and consultants, and has a demonstrated ability to meet fast-track deadlines. Ms. Barlow has an in-depth understanding of the importance of clear communication with clients to tailor a project’s work program to meet its particular objectives.



Previously, Ms. Barlow was the Senior Planner for the Town of Woodside. She was responsible for all planning applications and authored and managed Negative Declarations for historic resources and streambed alteration plans. She was the head of the Town’s stormwater pollution prevention program and staff liaison to the Town’s Historic Preservation Committee.

Ms. Barlow received a B.S. in City and Regional Planning from California Polytechnic State University, San Luis Obispo. She has studied design and arts programs at the University of London and the Czech University of Technology. Ms. Barlow was a Peace Corps Volunteer in the Czech Republic, serving as a municipal and environmental consultant. She is a member of the American Institute of Certified Planners, the American Planning Association, and the San Francisco Planning and Urban Research Association.

KEY PROJECTS

- Pier 70 Mixed Use District Project Environmental Impact Report (EIR); FC Pier 70, LLC; San Francisco, San Francisco City and County, California
- Parkmerced Project EIR; Parkmerced Owner, LLC; San Francisco City and County, California
- Concord Reuse Project Specific Plan EIR; City of Concord; Concord, Contra Costa County, California
- 19th Avenue Corridor Study; San Francisco Planning Department; San Francisco, California
- 201 Haskins Development Project; Confidential Client; South San Francisco, San Mateo County, California
- 75 Howard Street; Paramount Group, Inc.; San Francisco, San Francisco City and County, California
- 706 Mission Street/The Mexican Museum and Residential Tower Project EIR; Millennium Partners/706 Mission St. Co., LLC
- Rehabilitation and Detention Facility – Hall of Justice Jail Replacement; San Francisco Department of Public Works; San Francisco, San Francisco City and County, California
- The Infinity / 300 Spear Street Mixed Use Project; San Francisco, California

EDUCATION

B.S., City and Regional Planning; California Polytechnic State University, San Luis Obispo

LENGTH OF TIME IN THE INDUSTRY

23+ Years

Laura Moran, B.L.A., M.U.P.

Northern and Central California Vice President



Ms. Moran is a specialist in natural resources management and ecological restoration with over 30 years of experience consulting with federal, regional, and local jurisdictions on environmental projects throughout California. She got her early training as a biologist at a small engineering firm, working on everything from site planning to construction documents. She brings her analytical, managerial, and policy-making skills to bear on projects dealing with ecological restoration, climate change adaptation, wetland delineation and mitigation, habitat conservation, and landscape-level natural resource planning.

Ms. Moran's focus is on feasibility and implementation so that degraded habitats and environments are restored and functioning at a higher level. She has directed environmental impact analyses (CEQA/NEPA), biological resource inventories, multi-agency permitting, vulnerability assessments, and habitat restoration and monitoring plans. She plays a pivotal role in integrating the work of multiple specialties to help resource agencies and project proponents achieve their sustainability and resilience goals while balancing environmental stewardship and project design. Under Ms. Moran's management, staff have created multiple vegetation management, habitat conservation, mitigation, and restoration plans from concept through construction within a variety of sensitive California habitats.

KEY PROJECTS

- Los Gatos Vegetation Management Plan; Town of Los Gatos Department of Parks and Public Works; Los Gatos, Santa Clara County, California
- Carmel River Floodplain Restoration Project; California Coastal Conservancy; Carmel Valley, Monterey County, California
- American River Parkway Natural Resources Management Plan; Sacramento County Regional Parks; Sacramento, California
- Meadowood Estates Subdivision Project Environmental Impact Report, Fire Management Plan, and Vegetation Management Plan; San Mateo County; California
- Bear Creek Redwoods Vegetation Management Plans; Midpeninsula Regional Open Space District; Bear Creek Redwoods Open Space Preserve, Santa Clara County, California
- Oceano Dunes Habitat Conservation Plan and Natural Community Conservation Plan; MIG-TRA Environmental Sciences, Inc.; Oceano, San Luis Obispo County, California
- SCVOSA Coyote Valley Conservation Areas Master Plan Work Order #1; Santa Clara Valley Open Space Authority; Santa Clara County, California

EDUCATION

B.L.A./M.U.P. Program; City University of New York; 1988
B.S., Biology; St. Lawrence University, Canton, New York; 1985

LENGTH OF TIME IN THE INDUSTRY

23+ Years

Mark Brandi, MDes, RLA, CERP, QSD/QSP

Senior Restoration Ecologist



Mr. Brandi is a registered Landscape Architect (RLA), Certified Ecological Restoration Practitioner (CERP), and Qualified Storm Water Pollution Prevention Plan (SWPPP) Developer / Practitioner (QSD/QSP) with nearly two decades of experience in environmental consulting, planning, and design. His professional practice has focused on balancing conservation and development and integrating people and communities with the natural environment. Mr. Brandi's primary responsibilities include project management, planning and design, permitting, and implementation support for a wide array of landscape architecture and environmental design projects. These projects include the restoration of landscapes and ecosystems, the planning and design of parks, trails and open space, and the integration of public access improvements into sensitive habitats and landscapes.

KEY PROJECTS

- Purisima-to-the-Sea Parking Area and Trails Feasibility Study; Midpeninsula Regional Open Space District; San Mateo County, California
- SCVOSA Coyote Valley Conservation Areas Master Plan; Santa Clara Valley Open Space Authority; Santa Clara County, California
- Guadalupe-to-the-Sea Trail Feasibility Study; California Coastal Conservancy; Guadalupe, Santa Barbara County, California
- Coyote Point Eastern Promenade Renovation; San Mateo County Parks; Coyote Point Recreation Area, San Mateo County, California
- Red Barn Public Access Area Improvements; Midpeninsula Regional Open Space District; La Honda Creek Open Space Preserve, San Mateo County, California
- Carmel River Floodplain Restoration Project; California Coastal Conservancy; Carmel Valley, Monterey County, California
- West Bay Sanitary District Ecotone Levee Improvements Project; Freyer & Laureta, Inc.; Menlo Park, San Mateo, California
- Tolay Lake Regional Park Master Plan; Sonoma County Parks; Sonoma County, California

EDUCATION

MDes, Landscape Planning and Ecology; Harvard University Graduate School of Design; 2004
 B.S., Landscape Architecture; University of California, Davis; 2000

LENGTH OF TIME IN THE INDUSTRY

20+ Years

Bill Spain

Environmental / Recreation Planner

Dr. Spain has over 17 years of experience as an environmental professional. He has worked extensively on recreation planning and tourism related projects in California and throughout the western United States. He has prepared planning reports and studies for federal and state agencies including the Bureau of Land Management, the Bureau of Reclamation, and Utah State Parks. the Midpeninsula Regional Open Space District, and East Bay Regional Parks, among others. He has a strong background with data analysis and an understanding of natural resource issues in California conducting social research on natural resource tourism in the Rocky Mountain region. While finishing his Ph.D., Dr. Spain worked for the Institute of Outdoor Recreation and Tourism at Utah State University. He has previously worked as an instructor in the San Jose State University Department of Public Health and Recreation and the Utah State University College of Natural Resources.



KEY PROJECTS

- Coyote Valley Conservation Areas Master Plan Work Order #1; Santa Clara Valley Open Space Authority; Santa Clara County, California
- Lower American River Natural Resource Management Plan; Sacramento County Regional Parks; Sacramento County, California
- LA County Park Needs Assessment; Los Angeles County Parks and Recreation; California
- Pinecrest Lake Water Level Study; Pacific Gas and Electric Company; Tuolumne County, California
- Grand Staircase of the Escalante Front Country Management Plan and Study; Bureau of Land Management; Kanab, Utah
- Recreation Water Use Issues and Regional Planning; Institute for Outdoor Recreation and Tourism, Utah Division of Parks and Recreation, Department of Natural Resources; Salt Lake City Utah
- Survey of Utah Residents' Attitudes towards State Parks Utah Division of Parks and Recreation; Department of Natural Resources; Salt Lake City Utah
- Evaluation of California Department of Water Resources Education Program (Survey of Visitor Center Guests); California Department of Water Resources; California

EDUCATION

Ph.D.; College of Natural Resources; Utah State University; 2012
 M.S., Recreation; San Francisco State University; 2001

LENGTH OF TIME IN THE INDUSTRY

17+ Years



PROJECT APPROACH

Scope of **Work**

JLL understands the importance of all aspects of the elements identified in the RFP and has laid out the following six-phase scope over the contract period, to deliver 12 unique regional strategic plans.

YEAR ONE

YEAR TWO

PHASE ONE

- Kick Off Meeting with Visit California
- Client Project Team Alignment
- Key Interviews Visit California VIPs
- Existing Data Review
- Formation of Regional Advisory Committees

PHASE FOUR

- Index Outcome + Destination Positioning
- Demand Driver Scorecard by Region
- Event Analysis Scorecard by Region
- Digital Scorecard by Region
- Sustainability Evaluation by Region
 - Economic Development
 - Tourism Marketing & Promotion
 - Workforce development and labor shortages
 - Visitor safety
 - Housing
 - Public infrastructure
 - Transportation/Traffic
- **Deliverable:** Comprehensive Regional Scorecards + Stakeholder Summary

PHASE TWO

- Regional Destination Readiness Index
 - Comprehensive Categorical Data Gathering
 - Initial Modeling
 - Initial Outcomes
- Check-in with Visit California on outcomes
- Regional Summits for Index Outcomes
- **Deliverable:** Regional Index Outcomes

PHASE FIVE

- Destination Priorities by Region
- Regional Recommendation Development
- Check-in with Visit California on outcomes

PHASE THREE

- Regional Stakeholder Engagement
 - Development of regional surveys
 - Development of regional digital platforms
 - In-market Focus Groups
 - Virtual Stakeholder Interviews
- State-wide thought leadership
- **Deliverable:** Draft of Stakeholder Summary

PHASE SIX

- Metrics
- Develop Final Plan & Timeline
- Final Deliverables: 12 Regional Plans
- State-level Integration for Visit California



Phase 1

Kickoff Meeting with Visit California

The JLL team will meet with the leadership of the State of California to kick-off the planning process. This session will also solidify the most effective approaches to executing and maximizing the proposed scope of work.

Client Project Team Alignment

Beginning with an alignment meeting allows us to organize all the informational resources, dates and timeline, local data, and previous studies, including current working relationships this planning process should be aligned with.

Key Interviews with Visit California VIPs

JLL will meet with the State of California project leadership, state and federal subject-matter experts, and key stakeholders to collaborate on and review project objectives and details

Existing Data Review

JLL will assess the current research available and partner with Tourism Economics on existing research plan. JLL and Tourism Economics have partnered on similar work and have a history of successfully streamlining and incorporating relevant research.

Formation of Regional Advisory Committees

JLL has had great success with the formation of advisory committees to work as a sounding board for implementation. These committees will provide qualitative oversight, to ensure the work is overseen but to also help us identify the nuances of each region.



Phase 2

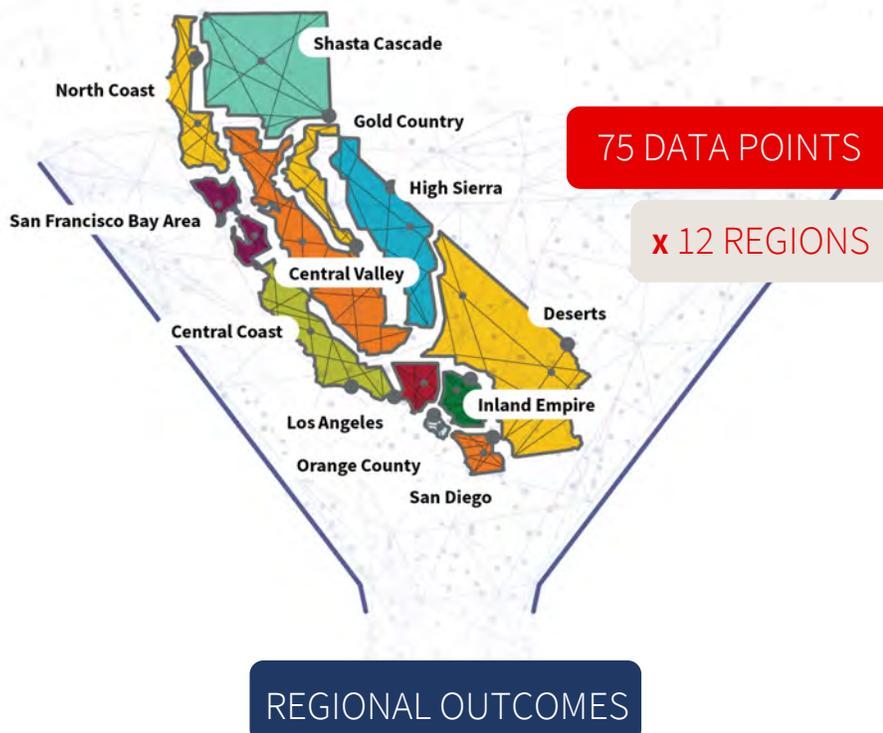
Regional Destination Readiness Index Development

Utilize the JLL Destination Readiness Index to provide assessment of key infrastructure & policies influencing tourism readiness and provide primary research to determine the ancillary benefits from tourism impacts. This will include the intangibles from the sphere of influence tourism has, as well as the benefits each California region sees from indirect impacts on infrastructure investments and other governmental revenues.

- **Destination Readiness Index Development by Region**

- Comprehensive Categorical Data Gathering
- Initial Modeling
- Initial Outcomes

The Destination Readiness Index was developed through a partnership between JLL and the World Travel & Tourism Council (WTTC) to understand direction, needs and ramifications of tourism policy and development. Taking into consideration the following factors: Environmental Health, Hotel and Attraction Partners using Sustainable Practices, Disability Readiness, Air Quality Index, Stability and many more. This gives an indication of the thoroughness of JLL's approach when assessing and recommending future priorities and proactive sustainability practices. The index will assist with determining the viability of the destination's commitment to tourism growth. During this phase, the JLL team will help outline the state's capacity to develop and implement a plan. It will also support the development of new strategic approaches to industry growth and measuring success in an environment that depends heavily on the ability to sustain the underlying natural assets of the region.



Phase 2

Check-in with Visit California on outcomes

JLL will meet with the Visit California project team to review outcomes of the Tourism Readiness Index. These outcomes will assist the team in developing priority recommendations for infrastructure projects that aid tourism.

Regional Summits for Index Outcomes

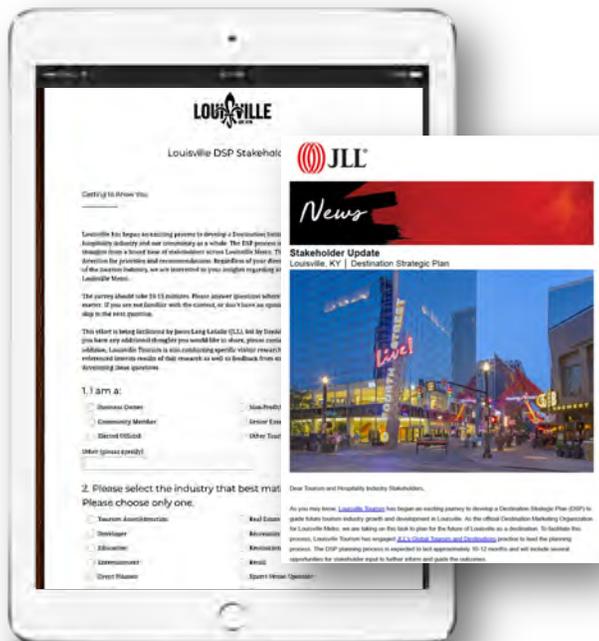
JLL will arrange regional summits in order to review outcomes of the Tourism Readiness Index, including industry leaders identified in Phase 1. The purpose of these summits will be not only to share the findings of the index, but to also leverage this opportunity to create strong brand perceptions for destinations. Additionally, the strategic involvement of regional leaders will produce community and industry wide support for the regional tourism plan.

Phase 2 Deliverable: Regional Index Outcomes

JLL will provide 12 summarized index outcomes per region in the state.



Phase 3



Stakeholder surveys | Monthly updates | Focus groups Dedicated website or direct email

JLL will ensure consistent & meaningful communication with stakeholders throughout the planning process.



Soliciting developer community input in Raleigh, NC

Regional Stakeholder Engagement: Interviews, Focus Groups & Survey

Broad-based multi-platform outreach creates buy-in and enhances the chances of successful plan implementation

JLL will establish stronger links between tourism and its economic impact on local communities by engage regional stakeholders, tourism industry business owners, residents, and visitors in visioning discussions about tourism management strategies, sustainable practices and overall best practices.

This will be conducted regionally through stakeholder meetings, remote polling, web surveys, digital dashboards, in-market focus groups, open dialogue and email updates – to gather their thoughts and perceptions of the destination. JLL will work with Visit California to identify tourism stakeholders that will be impacted by the project. This will include additional state and federal subject-matter experts as deemed necessary for collaboration on this project.

Additionally, JLL will review current and past plans and integrate strategies from relevant tourism and non-tourism entities. JLL’s comprehensive planning effort often coincides with parallel planning processes in other industries (i.e., outdoor recreation, department of transportation, economic development, revitalization, land management, etc.). We find this not only beneficial to tourism but to those partners who had not yet considered tourism in their planning efforts.

A key component of this highly inclusive process is to have the key tourism industry stakeholders involved in driving meaningful discussions for greater success in the State of California. The JLL project team is dedicated to this proven process of “engagement-driven” results. Our stakeholder survey is meant to live on past inception of the project, and ideally be done annually or bi-annually moving forward. We believe that constant communication and access for stakeholders brings out the best dialogue, which will influence the quality of the recommendations and build more lasting alliances between the tourism industry and civic, governmental, and political leadership in each region.

Deliverable: Stakeholder Summary Draft

JLL will draft an individualized stakeholder summary for each of the 12 regions.

Phase 4

Index Outcome + Destination Positioning

Identifying outcomes to take a deeper dive into areas of focus

Based on the work completed in phase 3, JLL will deliver final regional index scores. From this point, JLL will bring additional proprietary tools and globally recognized expertise through our JLL team and partners, to take a deeper dive in all of these areas identified in the Visit California scope.

Demand Driver Scorecard ★

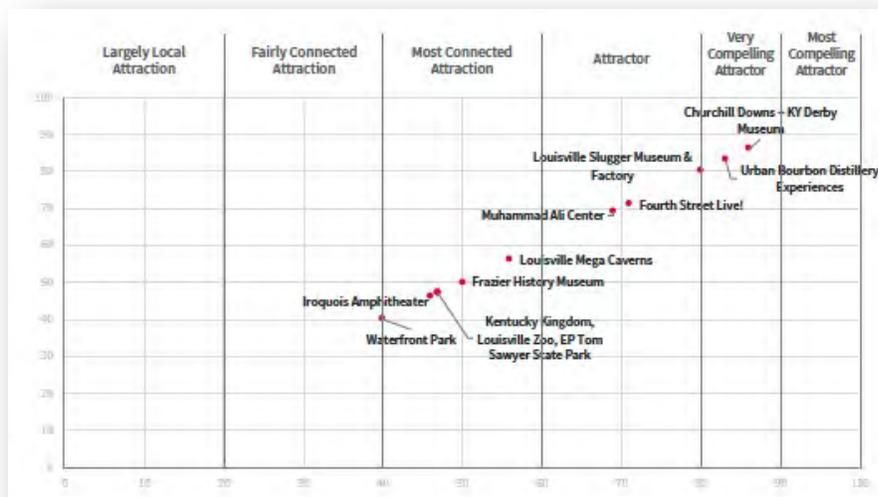
Score each region's demand drivers on JLL's **ground-breaking, one-of-a-kind** assessment tool

This rating of statewide tourism assets helps determine marketing opportunities, content development and future resource investments for each individual asset. It also provides a relative understanding of how each asset can potentially work within each region. This assessment approach will not only live past this planning effort as an ongoing tool available to the state and its partners, but also be used along with the competitive positioning benchmark to place the state on the scale to complete with benchmarked states.

The scorecard below demonstrates how JLL identifies future opportunities.



★ Exclusive JLL Product

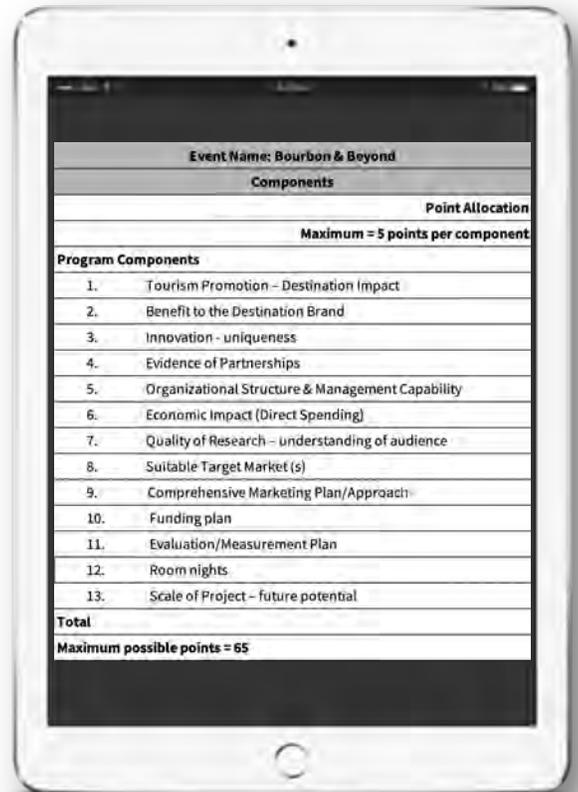


Phase 4

Leisure Event Analysis

Help regional events visualize their role in driving overnight business and stimulate the development of new signature events

Events can be important contributors to destination business. JLL's proprietary Leisure Event Analysis tool can help event planners, civic leaders, and regional/state leadership make important investment decisions about programming and messaging to deliver greater levels of visitation to the region. This tool will reposition California's regional events and leisure drivers in a manner that will create a focused event strategy with new resource allocation and measurable results. JLL will determine events the state should create/develop/pursue during need periods & funding support that may be required; infrastructure & other support needed by the region to launch successful events.



"JLL's event matrix above is a proven successful method for interfacing with current event organizers in supporting their future growth and impact on overnight visitation."

Loren Gold, Visit Raleigh

 Exclusive JLL Product



Phase 4

Digital and Marketing Module

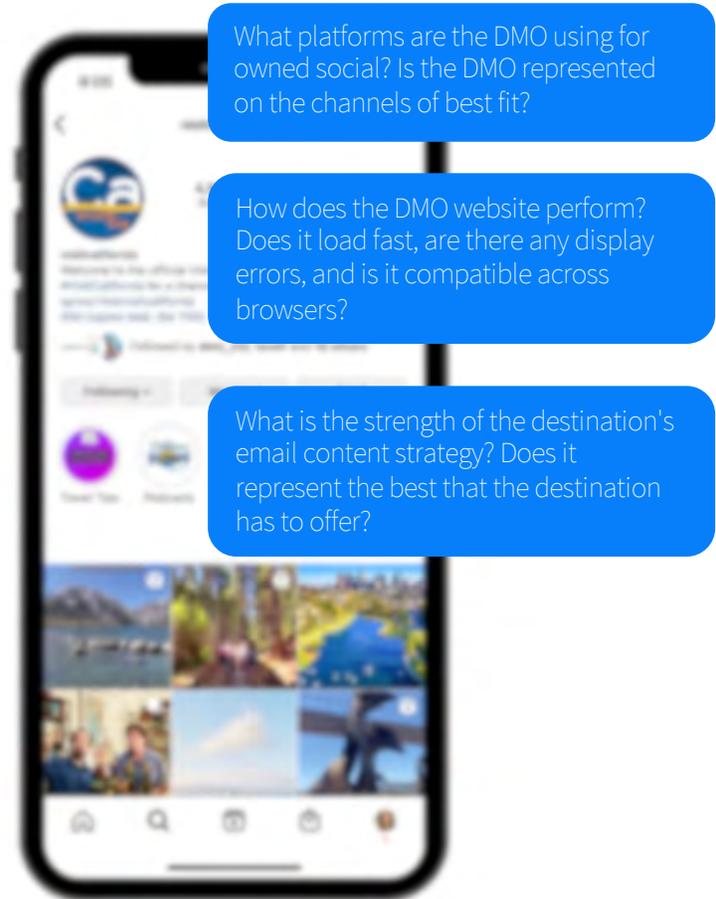
36-point review of each region's current digital readiness, as well as next-level consideration of in-market experiential digital, sharable photo opportunities and merchandise, and 5G and Wi-Fi connectivity

Digital tools can be a strange bedfellow to destination marketing. On one hand, web and social media platforms are perhaps the undisputed leaders of modern travel planning and inspiration. But on the other, many leisure travelers want to leave the distractions of their virtual world behind, and more or less all of business travel is predicated on the idea that sometimes you just have to be there. Travel, in all its exhilarating, five-senses experience, presents the greatest contrast between marketing and product.

DMOs with a strong digital strategy get to shape their brand and visitor experience from the get-go. Destinations that neglect building a robust website, publishing vivid social media content, and creating mobile, and in-market digital experiences instead will leave their image to the hands of fate. Whether you invest in it or not, people are researching and discussing your community – don't you want to have a say in that conversation?

In this module of Phase 4, JLL will perform an intensive review of each region's current digital readiness, including analysis of primary channels such as the web, mobile, email and social, as well as next-level consideration of in-market experiential digital, sharable photo opportunities and merchandise, and 5G and Wi-Fi connectivity. Based on this assessment, we'll provide actionable recommendations in three categories: easy fixes, moderate investments, and strategic initiatives.

 *Exclusive JLL Product*



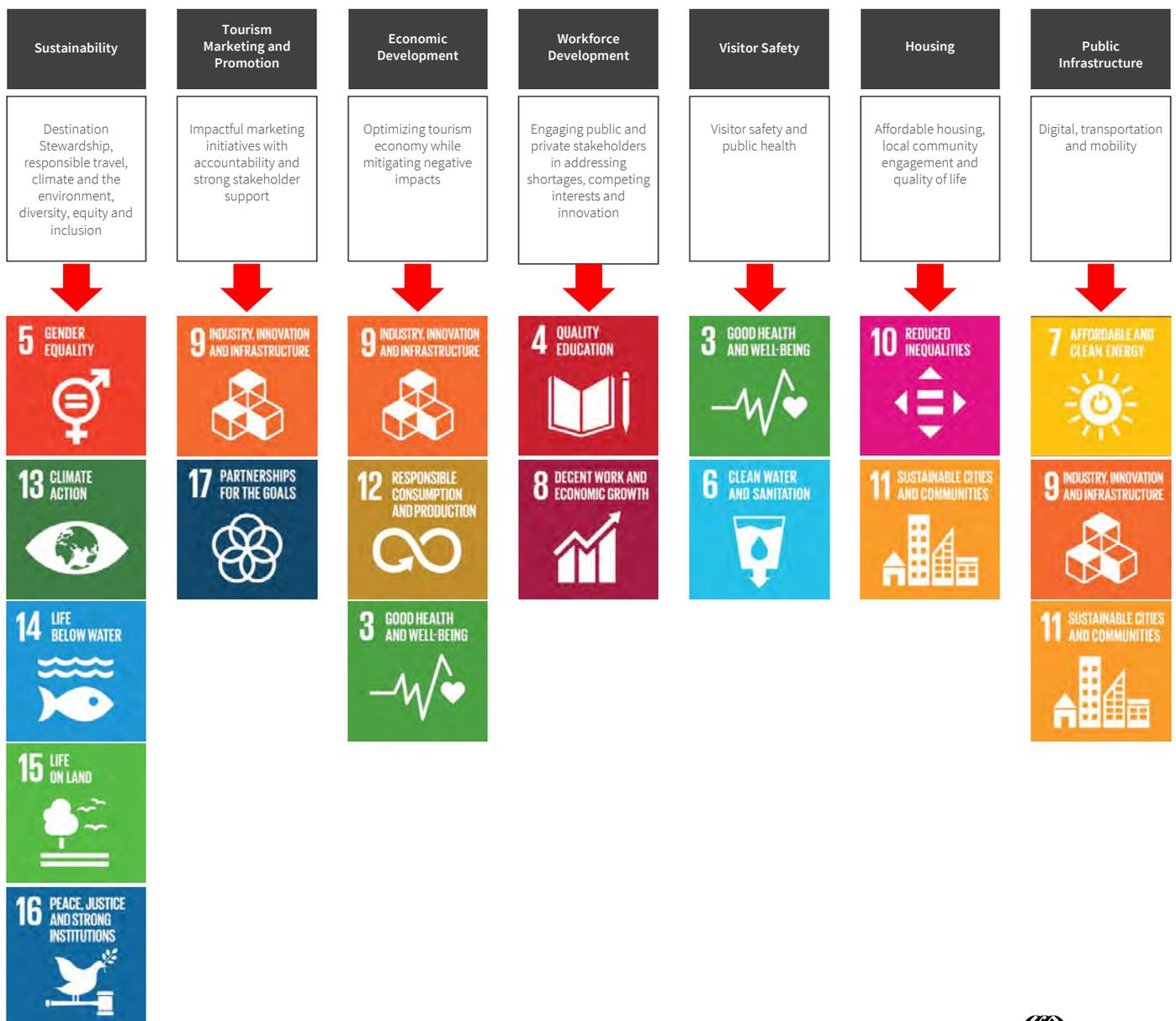
Phase 4

Sustainability Evaluation: Scorecard Development and Contextualization

The unique requirements of different destinations and stakeholders suggest that no one-size-fits-all approach will ever do the job. Our process is unique in that it ties quantitative and qualitative destination Critical Success Factors to globally recognized standards for sustainability (the UNWTO's Sustainable Development Goals), ensuring consistency with global best practices and a practical framework for implementation.

Once all the indicators and assessment criteria are validated and finalized, we will conduct the CSF assessments with a wide group of state and regional tourism industry stakeholders, as well as other stakeholders at the intersection of tourism and sustainability (e.g., transportation, environment, infrastructure, housing, community).

Framework for Destination Stewardship Assessment



Phase 4

Sustainability Evaluation: Destination Stewardship Assessment

Our scope related to Sustainable Destination Stewardship will leverage data from JLL’s Destination Readiness and Demand Driver tools and Risklayer’s Destination Risk Assessment software, as well as input from key tourism and non-tourism stakeholders (e.g., environment, housing, public safety, transportation, etc.), and industry best practices to create a Destination Stewardship Assessment for each region that will be foundational to strategic recommendations for sustainable destination management.

The Assessment will result in recommendations for each region across consistent critical success factors for destination stewardship, which will ultimately be easily consolidated and communicated at the state level. The Assessment will also inform areas of further analysis as they related to destination sustainability, per the RFP requirements (e.g., responsible travel, climate impact, safeguarding natural and cultural assets, etc).

Destination Stewardship Assessment	
Critical Success Factors	Sample Key Performance Indicators
Managing sustainable tourism	<ul style="list-style-type: none"> Do visitor surveys and other feedback mechanisms incorporate sustainability issues? Are sustainability issues embedded in visitor information? Is a key KPI growth in visitor volume during off-peak and shoulder-periods, and to less-frequented locations and attractions?
Local community engagement and quality of life	<ul style="list-style-type: none"> Are resident surveys or other systematic feedback mechanisms, covering tourism issues, carried out and reported? Is there a policy and a framework in place for protecting and monitoring accessibility (incorporating DEI principles) to natural and cultural sites for the local community? Is data integrated, analyzed, and leveraged across public-sector functions (e.g., visitor data, vehicular and pedestrian mobility, public safety, environmental conservation, etc.) to support holistic destination management and quality of life for locals and visitors?
Tourism economy, digital initiatives, and transportation/mobility	<ul style="list-style-type: none"> Is data gathered and analyzed covering a range of measures of economic impact (e.g., volume, expenditure, employment, investment and spread of economic benefit in the destination)? Does the digital strategy incorporate sustainability measures for recreational activities, attractions, transportation, and dining and lodging options? Has there been investment in and promotion of sustainable transport infrastructure, including public transport and low emissions vehicles?
Environmental awareness and conservation	<ul style="list-style-type: none"> Is there a list of natural heritage sites and assets, indicating type, conservation status and vulnerability? Do you monitor visitor flows and impact on natural sites, with results shared across the destination? Do regulations, guidelines and zoning for tourism development and activities incorporate the consequences of climate change?
Engaging public & private stakeholders in policy and implementation/investment	<ul style="list-style-type: none"> How do tourism enterprises support local community and sustainability initiatives (e.g., renewable energy, environmentally friendly equipment, etc.), and how is this encouraged/incentivized by the destination? Are resilience and sustainability requirements incorporated into RFPs for public-private tourism projects? Are certification mechanisms available and promoted to tourism enterprises that achieve sustainability standards?

Phase 4

Sustainability Evaluation: Ecological and Culture Resources

SWCA brings knowledge of California’s ecoregions, natural resources, cultural resources, built environments, and regulations to the JLL team. SWCA provides a holistic understanding of the baseline conditions of each region to the overall strategic tourism planning process.

SWCA will identify potential impacts to environmental and cultural resources and anticipate how physical changes that result from forces such as climate change may impact tourism at both the statewide and regional scales. Additionally, SWCA will bring an understanding of how impacts associated with tourism vary by region and will develop principles and strategies designed to protect those resources.

As part of the research and development of each regions’ strategic tourism plans, SWCA will coordinate with JLL to provide the following ecological and cultural resource metrics, analyses, and tourism stewardship solutions for each region and statewide:

- SWCA will assist JLL to identify key local leadership and stakeholders for engagement in areas where tourism and the environment intersect.
- SWCA will work with JLL and review JLL’s Demand Driver Scorecard and coordinate with local tourism officials and stakeholders to identify regional and statewide tourism-related environmental and cultural resources opportunities and constraints. This information can be used to support the ‘asset and amenities inventory and evaluation’ within the strategic tourism plan that is developed for each region.
- Based on stakeholder input and using publicly available data, SWCA will develop a geographic information system (GIS) containing relevant tourism-related spatial data layers to assist with the identification and analysis of key environmental and cultural resource assets, risks, and opportunities. In addition to regional and statewide analyses, urban vs. rural assessments will be made to determine the relative access and abundance of tourism assets in those areas.
- SWCA will produce informative data visualizations and maps that can be incorporated into the strategic tourism plan documents or on public-facing websites and data portals to help promote tourism in each region.
- SWCA’s technical staff and facilitation specialists will work with JLL staff, regional tourism officials, and various stakeholders to discuss environmental and cultural resource issues and to develop management and monitoring strategies for expanding the volume of and access to tourism assets, along with reviewing potential risks that may arise from those increases. United Nations Sustainable Development Goals (SDG) 14 and 15 (Life Below Water and Life on Land) will be incorporated into this review.
- SWCA will work with JLL to ensure tourism-related policy decisions are aligned with diversity, equity, and inclusion (DEI) considerations.
- SWCA will provide environmental-based principles and strategies to promote responsible and informed tourism activities.

Deliverable : Regional Scorecards

JLL will develop individualized scorecards per region that will be able to be viewed on a digital platform for ease of use.

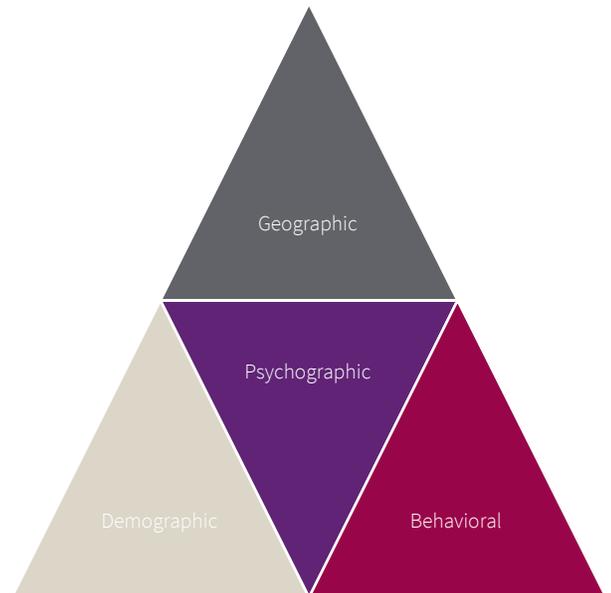
Phase 4

Sustainability Evaluation: Focused Assessments

Tourism Marketing and Promotion

JLL will evaluate all of the marketing and promotion activities in the region including the organizational structure for all marketing dollars supporting those efforts.

In every tourism strategic plan that JLL conducts this is a core aspect of understanding the current marketing efforts and the resource deployment. When considering a multijurisdictional effort this is compounded. JLL will work with the regional partners to understand the marketing efforts including target markets, demographics, psychographics and compare that with visitor trends and the unique aspects of each region to determine if future resource allocations need to shift. Additionally, JLL has brought in The Zimmerman Agency as a partner and subcontractor to further evaluate the marketing programs from an agency perspective with our strategy team. Together we will evaluate the creative, campaign execution, return on investment and alignment with regional destination assets to recommend future strategy and resource allocation across multiple jurisdictions and organizations.



Economic Development

JLL will evaluate each region from the perspective of an economic development professional.

The tourism economy in each region has a positive impact on the local economy from a visitor spend and tax generation standpoint. It can also be a catalyst for development and investment beyond our industry.

JLL regularly works with economic development corporations, redevelopment agencies and local municipal entities on how to leverage tourism for economic development benefits and community development benefits. Beyond this effort, which is core to our tourism strategic planning work, JLL has expertise in economic development and business incentives through our Location Services team. JLL will bring this resource to Visit California and the regions/districts listed below to evaluate and recommend how to attract new and different businesses to improve the economic landscape and find balance with community.

- Central Sierra Economic Development District
- Greater Bay Area EDD
- Sonoma-Mendocino Economic Development District
- Sierra Business Council
- Superior California Economic Development District
- 3Core Economic Development Corporation
- Yuba-Sutter Economic Development Corporation

Phase 4

Sustainability Evaluation: Focused Assessments

Workforce Development

We will focus on how macro global workforce trends are shaping the future of the travel and tourism industry and accelerating the need to reimagine how work gets done.

Due to several factors impacting tourism and hospitality, from the labor shortage to inflation/wage growth to the prominence of DEI, companies are reassessing their shifting workforce and focusing on how to get ahead of the demand curve.

Current State Assessment

To understand the current state of the travel and tourism workforce, we may gather employment details across the industry, analyze ongoing labor trends and initiate stakeholder interviews with key industry personnel:

- Understand impacts of hot-button issues facing the industry, including wage inflation/growth, the migration of workers to industries outside travel and tourism due to the pandemic and the resulting labor shortage.
- Understand California-specific workforce trends, including ongoing hospitality-related labor legislation (i.e., the fast-food industry wage bill), impact of collective bargaining on hospitality-related businesses, a tightening of J-1 visa requirements, minimum wage growth impacts and sources of labor in rural/urban areas.
- Analyzing data is a key step in understanding the current state. Any data that can be provided will be helpful in supplementing our data gathering.
- Examples of data that can be leveraged to identify trends and provide insights on the current state of the travel and tourism industry include: contractor/supplier data, number of workers across the different segments of the tourism economy, workers by region, (urban versus rural), wages by location and travel segments, turnover rates, union data, role, level in management, unemployment rates, recruiting sources, ethnicity, gender, working hours, job postings, number of applicants and employee safety ratings
- Hold discussions and interviews with key members of different tourism and non-tourism (e.g., economic development) stakeholder groups related to the analysis of the above-listed data

Solutioning for the Future

Identify best practices for developing a workforce strategy and corresponding implementable plan to ensure the necessary talent and skills match future business needs

- **Demand modeling:**
 - Incorporate learnings from data analysis and leadership interviews
 - Gather data on projected trend of changes (e.g., sales growth, investment spend, automation efficiency savings, large scale events, etc.)
- **Gaps and interventions:**
 - Identify capabilities needed for now / future, talent risks and costs; evaluate talent gaps to proactively fill for future pipeline

Monitoring Success

Tracking the progress of the program and seeing results in real-time will allow employers to adjust talent strategies to ensure gaps and interventions are addressed in a timely manner

- Design of a Talent Scorecard for quantitative and qualitative measurement of the current state compared to the targeted future state.

Phase 4

Workforce Development

Through JLL's partnership with Tourism Diversity Matters (TDM), we will focus on creating a more stable workforce by ameliorating housing imbalances and health and safety concerns. Tourism Diversity Matters' mission is to be a diversity resource that will educate, advocate, engage and empower the tourism and events industry in collaboration and cooperation with all other industry initiatives. They provide decision-makers in the tourism and events industry access, resources, and tactics to develop more effective Diversity, Equity, and Inclusion strategies to engage and retain a diverse workforce.

The Tourism Diversity Matters (TDM) Apprenticeship is an industry-driven, high-quality career pathway for a new generation of diverse Tourism professionals. The program develops a diverse talent of potential candidates who are qualified and ready to fill a position. This means that when a role becomes available, candidates are accessible and put forward for recruiting. A diverse workforce includes employees of different races, ethnicities, genders, sexual orientations, religions, and ages. Apprentices are not only able to put their learning into practice but are also learning and developing critical work-related skills such as leadership, communication, and analytical thinking. Networking: apprenticeships help candidates expand their professional network.

Apprenticeship programs benefit employers:

- Recruit and develop a highly skilled workforce that supports grow their business
- Improve productivity, profitability, and an employer's bottom line
- Create flexible training options that ensure workers develop the right skills
- Minimize liability costs through appropriate training of workers
- Receive tax credits and employee tuition benefits in participating states
- Increase retention of workers during and following the apprenticeship.

Tourism Diversity Matters apprenticeship provides candidates relevant work experience while mastering skills, classroom instruction, and a portable, nationally recognized credential in the Tourism industry.

- Combines aspects of supplied Job Descriptions to attract interested candidates.
- Develops a Flyer and Announcement to promote the Apprenticeship Program.
- Distributes Announcements and Flyers to targeted Workforce Development Programs, Local Colleges and Universities, Industry Associations, and Community Organizations.
- TDM Apprenticeship page receives all applicants acknowledging receipt and weekly updating the number of responses.
- Pre-screen all applicants and begin forwarding appropriate candidates for review.
- Facilitates cohort engagement, counseling sessions, and the Travel Academy curriculum.

Apprentices can choose tourism, hospitality, events, venue, or sports paths that align with their professional career goals. Host organizations will be able to create a sustainable talent pipeline to ensure a diverse and inclusive workforce. Each Apprentice will complete six hundred working hours among all three partners. During this time, they will gain experience working across multiple departments (i.e., marketing, sales, finance, operations, etc.)

To impact ethnic diversity in the tourism and events industry long term, we must first engage with young professionals in a meaningful way. For this apprenticeship program to succeed, there must be career planning, ongoing mentorship, support from our industry partners, and job placement at the end.

Phase 4

Sustainability Evaluation: Focused Assessments

Transportation

Diversifying and expanding available transportation options to mitigate overtourism, increase accessibility and address the needs of the local community are key tourism considerations.

Transportation infrastructure plays a critical role in the visitor journey but also requires equal consideration for local residents and the community. These need to be considered in the context of broader State transportation goals of reducing congestion, vehicle-miles travelled and greenhouse gas emissions. With investment in strategically growing tourism, transportation infrastructure must evolve to meet future objectives, maintain desirability of California as a destination, and preserve and enhance the visitor experience through wayfinding, regional connectivity and ease of navigation.

Current State Assessment

Develop a current state assessment through primary and secondary research of existing transportation infrastructure to understand trends, strengths and weaknesses, and opportunities for investment and growth.:

- Gather and analyze key data relevant to understanding the current state of transportation infrastructure across all regions from a tourism perspective. Such data may include:
 - Variety of available transportation modes (e.g., air, rail, electric vehicle and charging infrastructure, ride sharing, bike, pedestrian, scooter)
 - Visitors' use of various modes of transportation for out-of-state or international travel, intercity travel and local mobility
 - Trends in modal usage
 - Usage among visitors v. residents/community v. rural v. urban
 - Connectivity between tourism regions
 - Accessibility as it relates to tourism assets (e.g., attractions, hotels, sites) and related local congestion barriers or constraints
- Hold interviews with key transportation personnel at the state and local level, and relevant tourism stakeholders within each region.

Assess future opportunity

Through analysis of leading regional and national practices and leveraging the findings from the current state assessment, we will identify gaps in California's tourism transportation infrastructure and comment upon best practices for implementable solutions, investments, and improvements that align with tourism goals and objectives imbedded in the broader strategic plan, including the following:

- Future capacity and mitigation of overtourism
- Visitor and community usage
- Travel and tourism trends
- Regional connectivity
- Enhanced local mobility
- Potential with new transportation projects

Monitoring

We will support the development of a performance scorecard, designed to track progress of solutions, investments and improvements against goals through analysis of key metrics and observations, potentially including such components as:

- Congestion levels (vehicle & pedestrian)
- Accessibility
- Variety of transportation options, particularly introduction of alternative/clean modes
- Travel and connectivity between regions
- Visitor v. resident/community use
- Timing and efficiency
- Ease of last-mile connections

Phase 4

Sustainability Evaluation: Focused Assessments

Housing

Focus on understanding the impact tourism has on the housing market by region and the region's ability to house its tourism workforce.

This will include an analysis of the inventory of available housing units, short-term rentals, vacation homes vs. primary residences either to rent or buy, and rents and for-sale pricing especially considering the price points affordable to the tourism and local workforce.

Current State Assessment

To assess the current impact of tourism on the housing market, we will conduct qualitative and quantitative research to measure the current state of the housing market as it applies to tourism and prepare a housing snapshot for ease of comparison across regions. Gather and analyze key data relevant to understanding the current state of transportation infrastructure across all regions from a tourism perspective. Such data may include:

Quantitative Research:

- Quantitative research will include a review of demographic and socioeconomic data, homeownership and rental prices and trends, housing cost burden, housing characteristics (number of units, vacancy, age and type of structure), and tourism-related employment and wages by industry and occupation. These data points will support a gap analysis for income and affordability measures.
- In rural areas, the analysis will look to differentiate the applicability of data between the tourism-related workforce and other segments such as second-home owners.

Qualitative Research:

- Qualitative research will include conducting interviews with key stakeholders (e.g., tourism, civic, government leaders) to gain insights into the workings of the region's housing market, initiatives underway, and the perceptions/area challenges on housing from tourism (e.g., are there negative perceptions on the destination brand, perception of unsafe and/or unpleasant environment due to homelessness, and reality of unsafe environment particularly in urban environments?).
- Understand limitations on hiring/recruiting due to lack of proximate available housing/lengthy and inconvenient commutes.

Future Impact Mitigation

As part of the goals, strategy and action plan development, we will collect information on leading practices and models from across the country where communities have developed solutions to address these issues in both urban and rural communities.

- We will prepare a leading practice matrix that will include community size (geographic area and population), program type, funding, staffing, and other key elements overlaid with the current state analysis that will provide a springboard for exploring solutions to address the housing imbalance and that are actionable and implementable.

Monitoring Progress

Support the development of a performance scorecard to track the progress of new policies and solutions against goals using key performance indicators.

Phase 4

Sustainability Evaluation: Focused Assessments

Visitor Safety and Health

Focus on crises identification and management based on various environmental, climate or health-related risks, as they relate to both tourism, residents and businesses/stakeholders. Crime data for each region will also be included in the scenario planning. In particular, the following actions will be included:

- Public safety and health risk assessment (PSHRA) will include specific indicators from the following four pillars – demographics, public health and crime and governance.
- The assessments will be adapted to the urban and rural context of the 12 tourism regions based on available datasets and the specific context of tourism.
- A “What-if” analysis will be conducted where the impact of different scenarios is investigated on key indicators relevant for public health and safety in tourism

Responsible Travel

Scope will focus on both traveler and stakeholder responsibilities. This includes assessing behavior patterns of travelers aspiring to make sustainable choices on their trip to Responsible Tourism Scorecards for evaluating responsible practices of tourism businesses and destinations based on the Global Sustainability in Tourism Criteria. A key focus will be on “Diversity, Equity and Inclusion” (DEI) practices, and mitigating impact of overtourism. Moreover, the analysis will differentiate between urban and rural dominated regions in addressing responsible travel. In particular, the following actions will be included:

- Focus Group discussions and interviews with key informants from different tourism stakeholder groups
- Design of a Responsible Travel Scorecard for quantitative and qualitative measurement of the current state of responsible travel from a multi-stakeholder perspective.
- Implementation of the Scorecard through a web-based application
- Discussion of best practices and solutions that are implementable based on findings of desktop surveys, key informant interviews, FGDs and the SWOT analysis from the Scorecard assessment
- Implementation of the Scorecard on the Destination Resilient web-based application to track progress over time and monitor the results of these solutions and interventions.

Climate Impact

A comprehensive climate impact assessment will be performed for each region based on climate projections and data from California’s Fourth Climate Change Assessment. Exposure and vulnerability modeling for specific tourism assets using Risklayer’s Loss Modeling Technology will allow for the quantification of direct monetary losses for each of the regions. In particular, the following actions will be included:

- Climate impact assessment will include assessment of impacts of climate change, such as sea-level rise, rising temperatures and extreme weather events (e.g. floods, droughts, storms and wildfires).
- Socio-economic and environmental impacts of climate change will be investigated through the quantitatively derived Tourism Climate Vulnerability Index (TCVI) which provides an assessment of vulnerability of different tourism regions to a variety of climate shocks and stressors.
- The TCVI provides decision makers with a better understanding of what is driving vulnerability, insights into how economic recovery is balanced against climate impacts and supports interventions such as emergency response, health, and climate risk financing.
- Climate risk impacts and relevant tourism metrics will be implemented on the Destination Resilient web-based application for each of the tourism regions.

Phase 5

Priority Identification By Region

Vetting outcomes from first half of phased approach to identify focus areas

JLL will use the information and feedback gathered from Phases One through Four to classify regional priorities across the state and key focus areas to give each region a competitive edge. These areas will address short and long-term programs, tactics, and investments that address the needs of residents, visitors, business owners, employees, and customers. JLL will also propose key economic and qualitative visitor metrics that will complement the desire for long term sustainability. The resulting priorities will help illuminate ways the state's tourism industry can drive broad economic benefit and identify new strategies for generating new benefits outside of economic impact, such as quality of place, stronger collaborations/partnerships, etc. These priorities will be included as part of the implementation of each region's Strategic Tourism Plan.

Organizational Infrastructure Positioning

Review of organizational infrastructure and functions, marketing and sales plan direction, brand architecture, and other operational topics to ensure the Visit California leadership team is positioned for success with implementation for each region and to support long-term resilience of the tourism economy.

Conduct assessment on organizational operations, process, procedures, resources, etc. JLL will work with key partners who are involved in tourism to gain an understanding effectiveness of the current structure. JLL will assess the usefulness and impact of existing programs and their effect on industry collaboration and partnerships. Identify potential changes or new programs to further generate collaboration and make recommendations where there are opportunities to strengthen current models or propose changes.

Check-in with Visit California on Outcomes

JLL will meet with Visit California to review outcomes of all four phases and develop agreed upon milestones that are understood by stakeholders. JLL's approach is to create a roadmap that is aspirational and will require focus, however, is also achievable and motivational to the internal teams.

Assess the impact of existing programs and their effect on industry collaboration and partnerships. Identify statewide priorities to further generate collaboration within the State's tourism support ecosystem and identify strategies for generating benefits beyond economic impact, including stronger partnerships/collaborations, vibrant communities, and a stronger tourism ecosystem per region.

Integrated JLL Advantages for the State of California:

- ✓ Uniquely identified focus areas and priorities, tailored to the state of California.
- ✓ Tangible recommendations with metrics to ensure accountability and a communication plan for all stakeholders to understand success.
- ✓ Suggestions for upgrades to achieve suggested managed growth
- ✓ Sets a long-term vision with values based on broad based consensus.

Phase 6

Metrics

Develop new and more relevant success measurements in collaboration with Tourism Economics

JLL has developed an effective and clear system for categorizing reporting standards for destinations. As we conduct this planning work, concepts for metrics will be captured and developed to ensure the state's efforts deliver effective methods for reporting overall destination performance, indicators of future travel opportunities and direct impacts from programming. We will look at metrics from the vantage point of driving destination awareness and conversion to new business. JLL will evaluate the current methodologies used and validate the approach and suggest new approaches in collaboration with Visit California's current partner Tourism Economics, where applicable. We will take the information gained in the project immersion phase and gain agreement on the specific sales and marketing activities that will be evaluated to determine current metrics and reporting.

As a key component of ongoing success, we will work with the State of California staff to develop new and more relevant success measurements that embody the approach envisioned in the RFP including an effective measurement plan and a stakeholder communication plan to keep the industry informed. We are firm believers in accountability and driving measurable results and will work with the region on key metrics to measure success.

Deliverables + Plan Dissemination

Critical milestones and actions to start implementation

At the completion of this planning work, 12 comprehensive Strategic Tourism Plans will be delivered to each region and Visit California. The final plans will be customized to include a series of recommendations with a timeline and implementation milestones specific to each region. JLL will review the draft with the State of California, key stakeholders, and elected officials. JLL will develop a roll-out plan in conjunction with Visit California and regional leadership. JLL recommends at least one public forum (with remote access for virtual participation) per region, as well as key constituent meetings, related to plan delivery. JLL also recommends hosting educational webinars for plan roll-out and implementation.

The 12 deliverables will include:

- Outline
- Final Tourism Development Plan, including: Executive Summary, Goals, Objectives, Implementation Milestones & Tactics
- Final presentation(s) per region
- Educational Webinars for plan roll-out and implementation



State-level Integration for Visit California

Provide blueprints for impact regionally + statewide

The 12 regional plans will position California to have consistent impact statewide. These plans will be blueprints with the goal of being collaborative with each other and with the state. Despite their distinct individualized priorities, areas of commonality will be identified and ultimately integrated into Visit California's priorities for the state. JLL will plot the values of Visit California against the priorities identified above to establish wants and needs for each region's ecosystem including stakeholders and visitors. JLL will recommend and propose shared values, desired conditions, and expected visitor and use behavior.