



Regional strategic tourism plan

Orange County

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

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









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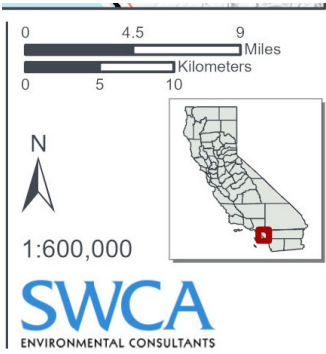
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Executive summary

The Orange County area is a diverse region known for its scenic coastline, affluent communities and bustling economy. The geography of the region is as varied as its cities, featuring miles of beaches, rolling hills and canyons. Tourism plays a significant role in the region’s economy, with anchor attractions such as Disneyland Resort and South Coast Plaza drawing visitors from around the globe. In 2023, the region reported total travel spending of \$15.8 billion, marking a 5.5% growth rate from the previous year, according to “The Economic Impact of Travel” report by Dean Runyan Associates in 2023.



County Region Major Road



To develop a comprehensive regional tourism strategy, Jones Lang LaSalle and Visit California embarked on an extensive two-year planning initiative. This effort aimed to enhance, harmonize and validate existing destination plans while examining tourism priorities and opportunities from a regional perspective. The approach included a thorough review of existing plans, such as the [Visit Huntington Beach Strategic Plan](#), [Travel Santa Ana Strategic Plan](#) and [Visit Newport Beach Destination Business Plan](#), among others. Broad stakeholder engagement was conducted through various methods, including regional advisory committee meetings, tourism stakeholder surveys with 58 participants, focus groups, individual interviews with more than 140 industry stakeholders and site visits to over 70 points of interest. Additionally, in-depth regional research and discovery was carried out to inform strategy development. This comprehensive approach not only provided valuable insights but also emphasized the importance of regional collaboration across the Orange County region, seeking to complement local strategies while identifying overarching priorities and opportunities to strengthen the region’s tourism sector.

The research process utilized several proprietary tools and methodologies. The tourism readiness [index](#), developed in collaboration with the World Travel & Tourism Council, analyzed nearly 4,000 tourism-related data points across 68 indicators. The region is classified as a “balanced dynamics” destination, indicating established tourism infrastructure with balanced growth in the business travel and leisure travel segments. Further, results indicated that the Orange County region surpasses or performs in line with California state averages in seven out of eight of the [index pillars](#), particularly in safety and security, business readiness and scale. The region is behind the state average in the policy category.

In the context of this project, “demand” refers to motivating individual leisure travelers to visit a destination through various offerings such as products, events, activities, experiences and other attractions. To address this challenge, two JLL analytical tools, the demand driver scorecard and the event matrix, have been used. These products are specifically designed to evaluate and analyze the effectiveness of leisure demand drivers, providing valuable insights into sustainably attracting this crucial leisure market segment.

[The demand driver scorecard](#) evaluated 100 attractions and experiences in the region. Scoring and analysis shows that the region’s diverse mix of tourist attractions and experiences is one of its greatest strengths. For example, the region features several large-scale attractions that attract national and/or international visitors, such as Disneyland Resort, South Coast Plaza and Knott’s Berry Farm. Further, over 40% of the rated attractions are considered outdoor recreation assets, including the beaches, canyons and ecological reserves, and the region is home to a variety of arts and cultural offerings, such as museums, galleries, theaters and historical sites.

The [event matrix](#) process assessed 40 events across the region, such as the Disneyland Half Marathon, Huntington Beach Independence Day Celebration and Laguna Beach Festival of Arts and Pageant of the Masters. The results of the event matrix indicate stakeholders should focus resources on the development and promotion of additional events that can attract national and international interest with the goal of driving overnight visitation and positive economic impact to the region. The Orange County region should also focus on new event development during off-peak and shoulder periods to reduce seasonality in tourism.



House of Blues, Anaheim

Based on these analyses and stakeholder input, several strategic priorities were identified for the Orange County region:

- 1** Invest in tourism product development: enhance and promote tourism offerings to drive additional overnight visitation, including the following key areas: 1) destination health care; 2) sporting events; 3) arts and culture; and 4) events and festivals.
- 2** Improve tourism-related transportation infrastructure: prioritize connectivity, enhance alternative transportation solutions and improve visitor education and awareness of public transit options.
- 3** Support workforce development: leverage apprenticeship programs and partnerships with educational institutions, municipalities, non-profits and local businesses to promote careers in the tourism industry and develop specialized training programs.
- 4** Enhance the region's narrative through regional marketing and messaging: develop a cohesive and unified brand identity for the Orange County region that promotes the diversity of experiences and attractions across the region while maintaining the region's individual destination identities.



Newport Beach

These opportunities align with state goals of sustainable tourism development, economic growth and enhancing visitor experiences while preserving natural and cultural resources. Implementation will require ongoing engagement with stakeholders, including destination marketing organizations, local businesses and community organizations.

In conclusion, the Orange County region features a strong tourism economy and opportunities for enhancement given its rich portfolio of natural and manufactured attractions, arts and culture, and diverse experiences. The strategic plan emphasizes the importance of balancing tourism growth with stakeholder and community needs. Ongoing focus among local tourism stakeholders will be crucial in implementing these recommendations and ensuring the sustainable development of the region’s tourism industry.

JLL and Visit California would like to thank the Orange County Regional Advisory Committee members who played a crucial role in this planning process. Their time, expertise, insight and valuable contributions throughout the process were instrumental in shaping this strategic plan. Their continued involvement and communication will be helpful in supporting implementation approaches to the strategic recommendations and ensuring the long-term success of tourism in the Orange County region. Please refer to the committee participants in the [Appendix](#).



Dana Point

Regional research and discovery

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



South Coast Plaza

The Regional Research and Discovery section includes significant research that has been detailed further and organized under the following categories for the Orange County region.

JLL—conducted research components:

- 1 State of the region overview: the overview provides a brief introductory summary of what currently impacts the tourism industry in the region.**
- 2 Destination plans review database: data gathering process that included 39 individual plans inventoried; elements include addressing housing, employment, guiding development and preserving existing neighborhoods, improving pedestrian experience and walkability, reducing traffic and congestion and more.**
- 3 Stakeholder engagement: this section incorporates feedback from multiple methods outlined here:**
 - Regional advisory committees: meetings held approximately monthly with a committee consisting of 15-plus members. Please refer to the [Appendix](#) for a full list of members.
 - Tourism stakeholder survey: 58 participants representing a diverse range of individuals and organizations involved in the tourism sector. The feedback summary highlights perspectives on strengths, weaknesses and growth opportunities.
 - Focus group feedback: in a small group environment, seven in-depth discussions with stakeholders were conducted from 11 different topics, including destination marketing; arts and culture; attractions; hotels and lodging; retail; food and beverage; workforce; transportation; housing; economic development; and sustainability. Through these discussions, valuable insights were gathered on specific areas of interest and growth potential.
 - Individual interviews feedback: over 140 key industry stakeholders were interviewed, offering a deeper understanding of perspectives and addressing specific questions and concerns.
 - Site visits: visited 70-plus points of interest throughout the region, providing valuable insights and observations.
- 4 Tourism readiness [index](#): detailed data analysis process that used nearly 4,000 data points to assess the readiness and capacity of the tourism industry in the region.**
- 5 Demand driver scorecard: evaluation that identified the key assets and experiences driving visitor demand in the region.**
- 6 Event matrix: evaluation which identified key events driving visitor demand in the region.**

Visit California provided research, JLL reviewed components:

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

A comprehensive research approach allowed for the development of a clear vision and strategy for the region's tourism industry, with foundational recommendations that are rooted in data, insights and feedback from stakeholders.

State of the region

The Orange County region, located in the heart of Southern California, is a diverse region known for its coastline, affluent communities and bustling economy.

The county is comprised of 34 incorporated cities and is home to nine destination management organizations and tourism departments. Among these cities, Anaheim features the world-famous Disneyland Resort, attracting millions of domestic and international visitors each year. Other cities include Santa Ana, the county seat, known for its cultural heritage and arts, and Irvine, recognized for its educational institutions and high-tech industries. The geography of the Orange County region is as varied as its cities, featuring miles of beaches, such as those in Huntington Beach, Newport Beach and Laguna Beach, as well as rolling hills and canyons further inland.

Tourism plays a significant role in the region's economy, with key attractions drawing visitors from around the globe. Beyond Disneyland Resort, tourists can explore Knott's Berry Farm in Buena Park, another theme park with a history dating back to the 1920s. For those seeking a cultural experience, the Segerstrom Center for the Arts in Costa Mesa offers performances and exhibitions. Huntington Beach, also known as Surf City USA, is a spot for surfers and beachgoers, offering wide beaches and a pier that extends into the Pacific Ocean. The region also offers many outdoor activities; Crystal Cove State Park, for instance, offers hiking trails with ocean views, while the Bolsa Chica Ecological Reserve is an area for birdwatching.

For the business traveler, the region has one of the largest convention centers on the West Coast, the Anaheim Convention Center, which offers over 1.6 million square feet of flexible meeting space. The facility includes exhibit halls, ballrooms and breakout rooms — designed to host a wide range of events, from large conventions and trade shows to conferences, meetings and other unique events.

Aligning the broader tourism industry and various destinations of the Orange County region is challenging given the diverse offerings and needs of each destination. Each city boasts its own set of attractions and cultural nuances, which can make it difficult to create a cohesive marketing and advocacy strategy that benefits the entire region. Moreover, balancing the needs of residents with the influx of tourists in certain parts of the region requires careful consideration.



Huntington Beach

Each city in the region faces its own set of unique challenges when it comes to managing tourism effectively. For instance, cities like Laguna Beach grapple with the issue of visitor management, especially during peak seasons, which can strain local infrastructure and diminish the quality of the visitor experience. To address this, there is a need to balance the influx of tourists by encouraging overnight visitation as compared to day visitors. The Orange County region is seeking to attract a diverse mix of travelers who appreciate the region’s unique blend of attractions. The ideal visitor is one who seeks an immersive experience, engaging with the local community, culture and natural landscape, while also contributing positively to the local economy. This includes families looking for memorable vacations, business travelers who extend their stays for leisure and international tourists drawn to the area’s renowned destinations.



Campesino Cafe, San Juan Capistrano

Destination plans review database

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

The comprehensive review encompassed 500 plans across California, with 39 plans specifically focused on the Orange County region. A full list of the reviewed plans can be found in the [Appendix](#).

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

1 Land use and community design

- Development that enhances community identity
- Quality of life improvements
- Historic preservation

2 Circulation and mobility

- Multi-modal transportation options
- Public transit improvements
- Traffic management and congestion reduction

3 Economic development

- Job creation and workforce development
- Tourism promotion
- Community vitality
- Business attraction and retention

4 Housing

- Housing supply and cost of housing
- Affordable housing options
- Preservation of existing neighborhoods

5 Community engagement

- Parks and recreation development and protection
- Recreation opportunities
- Arts and cultural development
- Community involvement in planning processes

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



Stakeholder engagement

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

Regional advisory committees

Regional advisory committees were monthly gatherings of industry leaders, including destination management/marketing organizations; economic development; lodging; attractions; retail; entertainment; transportation; workforce; and more. The committees consisted of 15-plus members, a full list of whom can be found in the [Appendix](#).

Tourism stakeholder survey

Questions from the survey capture a variety of topics including travel preferences, satisfaction levels with accommodations, transportation and attractions, suggestions for improvements, and more. The tourism survey was conducted anonymously to encourage feedback and diverse perspectives from various sectors across the region, while asking overall demographics and industry profile questions to shed light on the represented stakeholder groups. This survey garnered 58 responses from across the Orange County region.

Focus groups

Focus groups were conducted to discuss key themes and gather qualitative data. Seven focus groups were conducted with nearly 100 total participants, including DMOs; representatives from the lodging industry; attractions and arts; restaurants; retail; and entertainment sectors; and specialists in economic development; transportation; workforce; infrastructure; meetings; events and conventions; diversity, equity, and inclusion; and more. Through these discussions, valuable insights were gathered on specific areas of interest and growth potential.

Individual interviews

Individual meetings were held with stakeholders to collect detailed feedback. The stakeholders included industry leadership and management, supporters and individuals familiar with tourism's potential challenges and impacts on the region. The interview process encompassed over 140 individual interviews, including members of the regional advisory committee.

Site visits

Site visits were conducted within the region to view the local environment, engage directly with stakeholders, visit tourism sites and attractions, and observe the dynamics of the tourism industry in the region. Over 70 points of interest were visited throughout the region.

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

Key themes from stakeholder engagement

The various methods of stakeholder feedback surfaced several major themes within the Orange County region:

- Traffic and road congestion continues to illustrate the importance for enhanced public transportation, connectivity and mobility options throughout the region.
- The tourism workforce in the region faces cost of living and affordability challenges, including the high costs of housing and commuting. Many workers in the hospitality and tourism industries face long commutes from other regions where housing is more affordable — resulting in additional traffic and congestion in the area.
- Tourism-associated businesses in the region experience labor cost challenges. The cost of hiring and retaining employees poses a significant challenge when operating in the region.
- Sustainable tourism practices continue to gain importance. With many natural assets in the region such as the beaches, canyons, hiking areas and nature preserves, it is crucial to protect the natural environment. The resilience and sustainability scorecard assessment for the Orange County region provides comprehensive recommendations for achieving leading practices in sustainability and resilience in the region.
- During peak seasons, beaches are popular destinations for travelers, resulting in increased demands and pressure on these assets and local communities. To efficiently enhance visitor flow and further contribute to the appeal of anchor attractions, opportunities exist to create and market regional itineraries that promote lesser-known attractions and experiences.
- Continuously improving the regional visitor experience is crucial for the success of the region, as the leisure, group and business demand segments play a vital role in the success for the region’s tourism business. One such sector that has opportunity for growth is health care tourism. With major institutions like City of Hope, UC Irvine Health, Children’s Hospital of Orange County and Hoag Memorial Hospital Presbyterian leading the way in advanced medical treatments and research, the region can further capitalize on destination health care tourism. There is an opportunity to increase alignment with local hospital systems and enhance the marketing of the region’s health care offerings.
- While the Orange County region has a rich arts and culture scene, there is an opportunity to further develop and promote the region’s offerings to establish Orange County as a premier destination for arts and culture. Efforts to highlight the diversity of the region’s arts and cultural offerings through collaborative initiatives, strategic marketing and communication can help to elevate the region’s profile as a destination for cultural tourism.
- Sports and sporting events in the region present a significant opportunity for growth for the tourism industry. With the presence of the OC Sports Commission, tourism and hospitality stakeholders can explore opportunities for collaboration to drive overnight visitation generated by local sporting events.

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

Tourism readiness index

Overview

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

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

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

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

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

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



Yorba Regional Park

The Orange County region results

The tourism readiness index reveals that the region surpasses or performs in line with state averages in seven out of eight pillars, highlighting robust performance. Notably, the Orange County region stands out when compared to other regions in terms of safety and security, and business readiness. However, it falls slightly behind the state average in urban readiness.

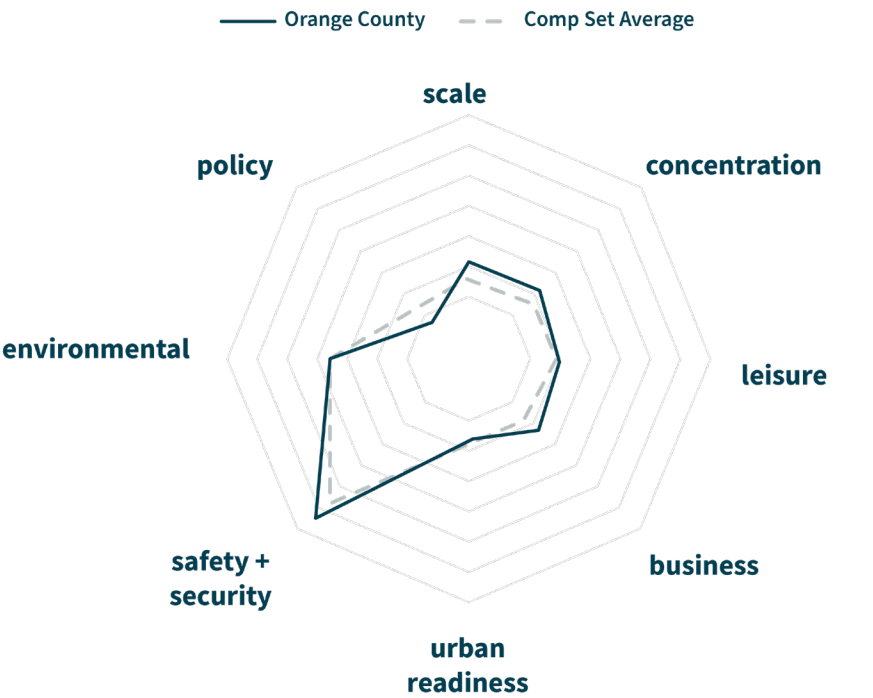
In-depth analysis of data from sources such as Destination Analysts, Tripadvisor and more shed light on the factors contributing to the region’s strong readiness performance. For instance, the analyzed data highlights diverse and high-quality attractions, availability of lodging, safety and favorable job availability and quality as key strengths for the region.

Conversely, certain areas experience challenges such as traffic congestion during peak hours, housing affordability and visitor management. These insights provide opportunities for targeted improvements to enhance the region’s overall tourism readiness and enhance its competitive edge.

Based on the results, the region is classified as having “balanced dynamics.” This typology represents an established region/destination with the ability to accommodate and cater to the needs of a diverse range of visitors. This classification highlights the region’s well-developed tourism infrastructure, with a balanced and sustainable pace of growth for the destination.

As a balanced dynamics destination, the Orange County region should prioritize enhancing the breadth of visitor experiences, with a focus on new and emerging areas such as health care tourism and cultural tourism. These themes are further explored in the opportunities section. The destination should also focus on proactively managing pressures in overcrowded areas during peak periods, such as the beach communities. By continuously improving the overall experience for visitors, the Orange County region can maintain its position as an established destination. Additionally, proactively managing challenges such as overtourism and traffic congestion will be crucial to ensure a smooth visitor flow. Please refer to the [Appendix](#) for a more detailed overview of the tourism readiness index and all destination typologies.

Outcome by pillar



Demand driver scorecard

Overview

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

This scoring process was based on an evaluation which includes:

- **Multistep assessment:** evaluating and assigning points to each attraction or experience against eight key criteria, including current visitor demand levels, event opportunities, engaging visitor experience and more (further detail outlined in [Appendix](#)).
- **Categorization as attractions vs. attractors/demand generators:** categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** classifying each attraction into a category based on overall points score. Categories were little to no visitor interest (0-19), interesting to do on a repeat visit (20-39), "must see" if in the area (40-59), regional attractors (60-79), national attractors (80-95) and global attractors (96-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Categorization of each demand driver:** segmenting assets into 13 unique market categories based on specific criteria and characteristics, including family-friendly attractions, museums, entertainment, educational attractions, outdoor recreation and more. Assets could be assigned to multiple relevant categories.

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



Santiago Oaks Regional Park



Anaheim Packing House

The Orange County region results

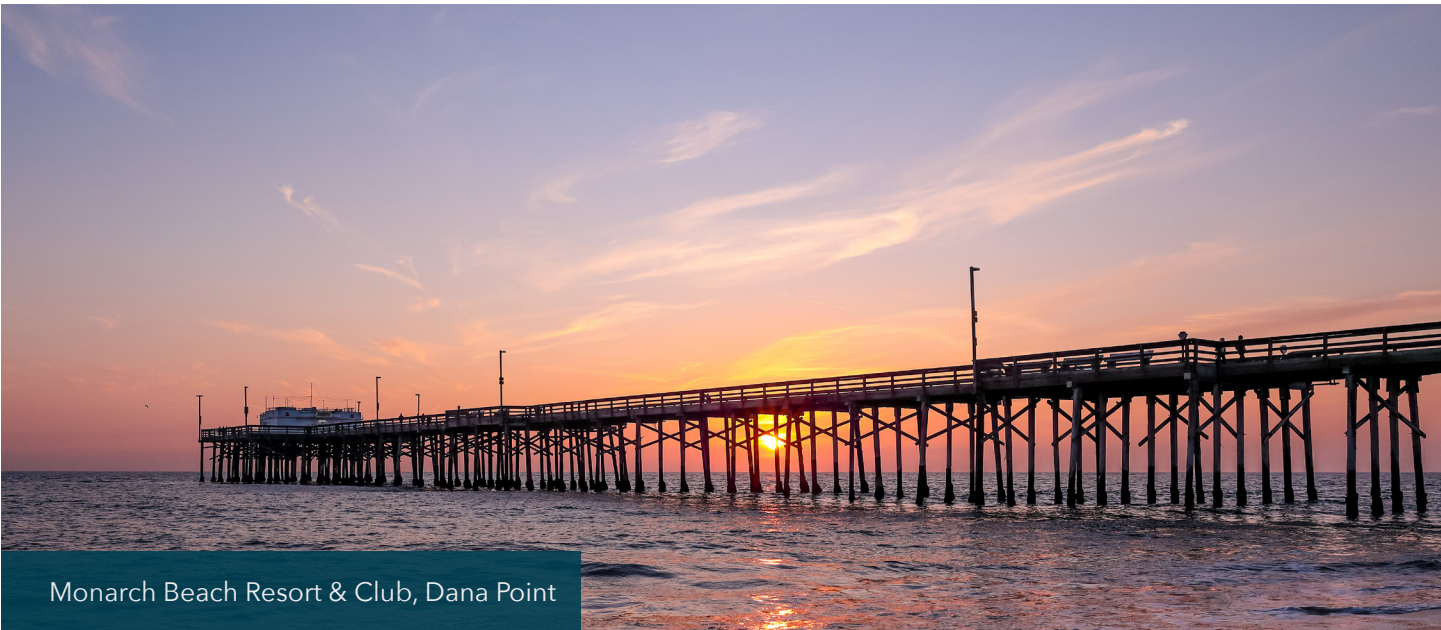
The Orange County region demand driver scorecard process assessed 100 attractions and experiences across the region, which were identified by regional advisory committee members, individual interviews, desktop research and by JLL during site visits. The scoring and analysis is a representative analysis intended to highlight the significant inventory and diversity of assets in the region.

The Orange County region has several large-scale attractions that consistently attract national and/or international visitors. Examples include Disneyland Resort, South Coast Plaza, Knott’s Berry Farm, Huntington Beach Pier, Newport Beach Balboa Peninsula and Laguna Beach Main Beach — among others. Assets that attract national and international visitation to the region typically create a significant, measurable economic impact on the destinations through room nights, direct spending and other indicators. One of the region’s greatest tourism drivers is the Disneyland Resort in Anaheim, consistently attracting domestic and international demand year-round. Many smaller attractions and businesses (restaurants, retail, museums, etc.) in the region enjoy overflow demand from visitors who are visiting Disneyland first.

More than 40% of the region’s top attractions included in the analysis are recognized as outdoor recreation assets, including the beaches, canyons, ecological reserves and more. The region also offers a variety of large-scale retail centers, such as South Coast Plaza and the Irvine Spectrum Center. Finally, the region boasts a variety of arts and culture offerings — including museums, galleries and historical sites — rounding out the region’s portfolio of demand drivers. Scoring and analysis shows that the Orange County region’s diverse mix of tourist attractions is one of its greatest strengths.

Guided by the findings from the demand driver scorecard, a diverse mix of attractions is crucial in attracting visitors to the area. The region currently has strong drivers exemplified by its theme parks, retail centers, arts and culture centers and beaches. The evaluation of 100 local attractions, including major draws like the Disneyland Resort and South Coast Plaza, underscores the importance of such assets in generating economic benefits through visitor spending.

However, there is room to further promote the region’s portfolio of arts and culture offerings to a greater audience. By capitalizing on its diverse cultural heritage, the region can enhance its appeal to tourists looking for unique and engaging experiences. Emphasizing cultural tourism draws those interested in the arts and a wider audience in search of distinctive travel opportunities. This focus is key to boosting the tourism sector’s growth and longevity in the region and will be further discussed in the forthcoming recommendations. Moreover, regional cooperation is crucial in supporting emerging tourist attractions and improving existing ones.



Monarch Beach Resort & Club, Dana Point

Event matrix

Overview

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

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

The event matrix process included:

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

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



Pelican Hill

The Orange County region results

The Orange County region event matrix process inventoried and scored 40 events across the region that were collaboratively identified by the regional advisory committee, during our visits to the region, noted as high priority in stakeholder surveys and validated as significant current and future room night generators during stakeholder discussions. Like its demand drivers, the region hosts an array of events, with a diversity of events across the region and throughout the year.

The outcomes from this analysis identified 19 unique events that are positioned to drive regional demand to the Orange County region, including the Pacific Airshow, Ohana Fest, Season of the Force at Disneyland, Orange County Fair and Surf City Marathon. These high-impact events drive leisure tourism and enhance the destination’s visibility. Hoteliers, retailers, restaurateurs and other regional representatives reinforced the significant annual economic impact of these events. However, stakeholders highlight the need for a centralized calendar of events, with a desire to increase promotion and visibility of year-round event offerings to visitors to combat seasonality.

Several additional events were analyzed, such as the Doheny Blues Festival and Newport Beach Film Festival. While these events attract some visitors, overall scores indicate these events are primarily local in nature and contribute less overnight visitation and economic impact as compared to other annual events in the region.

The results of the event matrix indicate stakeholders should focus resources on the development and promotion of events that can attract national and international interest with the goal of driving overnight visitation and positive economic impact to the region. Emphasizing arts and cultural events that showcase the diversity of the Orange County region will not only enrich the visitor experience but also celebrate the region’s varied cultural offerings. The region should also focus on expanding existing events across the region, including well-known tourist destinations and lesser-known areas. Additionally, by focusing new event development on off-peak and shoulder periods, the region can reduce seasonality in tourism and maintain a steady flow of visitors year-round.

The results from the event matrix serve as the basis for recommendations in the strategic plan and are explored further in the recommendations section. Further, it is recommended that the event matrix is utilized on an ongoing basis as an objective approach to evaluating the event inventory at any given time to assess the impacts of current events in the region.

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



Pendry, Newport Beach

Key themes from the research process

- Widespread stakeholder engagement played a crucial role in developing the regional strategic plan, with input gathered through various methods such as interviews, surveys and focus groups.
- Key themes that emerged from the engagement process include the recognition that continuously improving the visitor experience and promoting the diversity of offerings is crucial for the success of the region. The domestic and international visitor segments were identified as playing vital roles in driving economic growth and sustaining a thriving visitor economy. Themes will be further explored in the recommendations section of this plan.
- JLL's tourism readiness **index** classifies the Orange County region as having “Balanced Dynamics” with well-developed tourism infrastructure and robust performance in categories like safety and security and business readiness.
- With balanced dynamics, the region should prioritize enhancing the breadth of visitor experiences, with a focus on new and emerging areas such as health care tourism and cultural tourism.
- The demand driver scorecard process assessed 100 attractions and experiences across the region. An investment prioritization approach based on the results of the scorecard should be put into motion during the first year of implementation.
- The demand driver scorecard results highlight the significant inventory and diversity of attractions and experiences in the region, with numerous scored assets generating international and/or national demand.
- The event matrix process inventoried and scored 40 events across the region. The process indicated that there is a need for alignment on event promotion, and a desire for a centralized database that lists all the events offered in the region.
- The event matrix analysis identified 31 unique events in the region that are positioned to drive national and/or regional demand — attracting visitors consistently throughout the year.

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



Monarch Beach Golf Links, Dana Point



Glasspar Seafood & Steakhouse, Dana Point

The Economic Impact of Travel

(Dean Runyan Associates, 2023)

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

In summary, in 2023, the Orange County region achieved a significant milestone in its travel industry, with total travel spending reaching \$15.8 billion, marking a 5.5% growth rate from the previous year. Visitor spending accounted for \$14.7 billion, while additional travel-related expenditures added \$1.1 billion. This upward trend reflects strong recovery and robust growth post-pandemic, highlighting the county’s attractiveness and resilience as a travel destination within the state.

The economic contributions of travel in the region position tourism as one of the strongest industries in the region. Employment within the travel industry surged 8.0%, providing 132,710 jobs for the region. Direct travel-generated earnings increased 12.8% to \$6.5 billion, with key sectors such as accommodations, food services, arts and entertainment showing substantial growth.

Visit California Community Sentiment Study

(Future Partners, 2023)

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

Key findings for the region include residents’ appreciation for tourism’s role in supporting hotels and resorts, as well as providing business and job opportunities. Nearly 60% of respondents agree that tourism is important to the local economy, and that the benefits from tourism outweigh problems in both the local communities and the region overall. Residents highlight traffic and congestion, crowding and trash as the main challenges created by visitors.

The Orange County region offers a variety of appreciated features, such as climate and weather (90%), restaurant and dining options (89%) and shopping districts (86%). Popular tourist attractions include beaches (80%), theme parks (72%) and outlet malls (68%). While residents enjoy these amenities, issues such as theme park overcrowding (38%) and beach congestion (29%) are points of concern. Tourism’s dual impact is evident, with locals recognizing significant business opportunities, job creation and hotel support, alongside prevalent issues such as traffic (75%), crowding (70%) and litter (58%).

Residents see tourism as a net positive, with over half of the residents agreeing that tourism’s benefits outweigh its problems both locally (54%) and regionally (55%). Importantly, residents agree that the tourism industry enhances quality of life for individuals and their families, with 43% of locals deeming it helpful to the community quality of life, and 52% for the region. In addition, approximately 74% feel that tourism is important to the region overall.

Strategically, the Orange County region should focus on balancing tourism’s economic benefits with quality-of-life improvements. Addressing traffic, congestion, crowding and litter through infrastructure and policy changes could strengthen tourism’s positive perception. Promoting lesser-known local attractions could distribute visitor pressure more evenly by reducing stress on the most popular sites, such as the beach communities. A targeted campaign highlighting the symbiotic relationship between tourism and community wellbeing might also foster resident support and minimize resistance.



Knott’s Berry Farm, Anaheim

The Orange County regional opportunities

The Orange County regional opportunities outline several key priorities and strategies to enhance the region's tourism industry and address critical challenges. These opportunities have been developed through comprehensive research, extensive stakeholder engagement and thorough analysis of the region's unique attributes. The opportunities span across various crucial aspects of tourism development, including tourism product development, tourism-related infrastructure and more.

Each opportunity area is accompanied by possible strategies designed to leverage the region's diverse assets, address existing challenges and position the region as a premier, sustainable destination for visitors. The following sections delve into these opportunities in detail, providing a comprehensive road-map for stakeholders, destination marketing organizations and partners across the region to consider in the coming years. These strategies aim to foster a more integrated, sustainable and resilient tourism ecosystem that benefits both visitors and local communities while preserving the natural beauty and cultural heritage that makes the Orange County region unique.

1 Invest in tourism product development

Destination health care

The Orange County region's health care sector is experiencing a transformative phase of growth and innovation, with major institutions like City of Hope, UC Irvine Health, Children's Hospital of Orange County and Hoag leading the way in advanced medical treatments and research. These facilities are renowned for their specialized treatments and state-of-the-art medical technologies, which draw patients both domestically and internationally. As a result, destination health care plays a pivotal role in driving regional lodging demand.

Many of Orange County's major health care institutions are unveiling significant expansions and new state-of-the-art hospital facilities, signaling a growing opportunity for health care visitation. For example:

- **City of Hope** is investing approximately \$1.5 billion to establish a cancer campus of the future in Orange County, enhancing its clinical network across Los Angeles and Orange counties. This expansion will enhance cancer care in the region, providing services for patients seeking innovative treatments.
- UC Irvine is embarking on a \$1.3 billion project to construct a new, **UCI Health — Irvine medical complex**, including an acute care hospital, comprehensive cancer center and advanced care facility.

Key partners

Orange County Business Council (OCBC), City of Hope, UCI Health, Hoag Medical Group, Children's Hospital of Orange County, Garden Grove Hospital Medical Center, Anaheim Global Medical Center, Anaheim Regional Medical Center, St. Joseph Hospital, Orange County Global Medical Center, Kindred Hospital Westminster, Kindred Hospital Santa Ana, Huntington Beach Hospital, Foothill Regional Medical Center, Chapman Global Medical Center, St. Jude's Research Hospital Santa Ana

Strategies

- Expand partnerships with local health care institutions through strategic alliances and marketing initiatives to facilitate referrals between health care organizations and lodging businesses.
- Develop digital visitor guides and tailored marketing campaigns toward potential patients of elective procedures in key source markets that highlight the region's advanced medical facilities and services to promote it as a premier health care destination.
- Promote offerings of specialized lodging packages for health care-oriented visitors that include key features such as discounted room rates, flexible booking policies, transportation options and amenity packages conducive to longer stays.



Cerveza Cito Brewery, Santa Ana

Sports tourism

Sports and sporting events in the Orange County region present a significant opportunity for growth in the tourism industry. With its favorable climate, professional teams and high-quality athletic facilities, such as the Honda Center and Great Park Ice & FivePoint Arena, the region is well-positioned to host a variety of sporting events throughout the year and drive overnight visitation.

Major events like the World Cup, Super Bowl and the LA28 Summer Olympics are expected to draw significant attention to Southern California, creating substantial opportunities to enhance sports tourism. Additionally, youth and amateur sports represent a growing segment, with organizations like the Orange County Sports Commission working to drive events and visitation throughout the year. The combination of the region's diverse venues and strong community support for sports is anticipated to contribute to the expansion of sports tourism and drive future economic growth.

Key partners

OCBC, OC Sports Commission, OC Youth Sports, Honda Center, Angel Stadium, Great Park Ice & FivePoint Arena, Anaheim Convention Center, YMCA of Orange County, Orange County Youth Sports Foundation (OCYSF), Centennial Park Santa Ana, Bren Events Center UC Irvine, Huntington Beach Sports Complex, Huntington City Beach, Jack Hammett Sports Complex, Lake Forest Sports Park, Marguerite Aquatics Complex, Orange Coast Aquatics Center, World Cup Soccer Park, Rancho Mission Viejo Riding Park, Ladera Sports Center

Strategies

- Develop tailored itineraries and experience packages for sporting event attendees that showcase the region's diverse attractions, encouraging attendees to explore diverse areas beyond the immediate vicinity of the event.
- Leverage digital marketing (e.g., social media platforms, targeted ads) to reach potential sporting event attendees and their networks and create content that showcases the region's attractions, testimonials from past visitors and highlights from previous events.
- Capitalize upon the international exposure of the region's LA28 Summer Olympic venues (e.g., Huntington Beach for the surfing events) to cultivate awareness of the region's event hosting capabilities.
 - This opportunity aligns with the [Visit Huntington Beach Strategic Plan](#), which aims to leverage global events, such as the LA28 Summer Olympics, to expand global destination brand awareness.



Arts and cultural tourism

The Orange County region boasts an array of arts and cultural offerings that reflect its diverse population and creative spirit. The region is home to a variety of cultural institutions, from renowned performing arts centers like the Segerstrom Center for the Arts in Costa Mesa, to smaller, community-driven venues that host local artists and performers.

The region’s visual arts scene is vibrant, with numerous galleries, public art installations and the Laguna Beach arts community, known for its summer arts festivals such as the Pageant of the Masters and the Sawdust Art Festival. Additionally, areas such as Santa Ana feature historical sites such as the Heritage Museum of Orange County, as well as unique cultural assets such as the Artists Village and the monthly Art Walk. The region also features several diverse neighborhoods, such as Little Saigon, Little Arabia and Buena Park Koreatown. According to [JLL’s Demand driver scorecard](#), approximately 30% of the most significant demand drivers analyzed in the Orange County region were categorized as arts and cultural assets. While the region’s diverse portfolio of arts and cultural attractions is one of its greatest strengths, the region should continue to explore opportunities to enhance its offerings and brand as a premier destination for arts and cultural tourism.

Key partners

California Arts Council, Arts Orange County, Segerstrom Center for the Arts, Pageant of the Masters, Orange County Museum of Art, Culture OC, OC Art Guide, UCI Jack and Shanaz Langson Institute and Museum of California Art, Laguna Beach Art Walk, Downtown Santa Ana Art Walk, Bowers Museum, Laguna Art Museum, Hilbert Museum of California Art, Muzeo Museum and Cultural Center, Orange County Center for Contemporary Art

Strategies

- Develop a signature countywide arts and cultural celebration that brings together and highlights the region’s diverse offerings over a multi-week period.
 - New York City’s [“It’s Time for Culture”](#) brings together a diverse set of venues across New York City’s five boroughs to host seasonal events, concerts, tours, classes and family-friendly activities.
- Enhance promotion of the region’s cultural offerings, including unique cultural neighborhoods (e.g., Little Saigon, Little Arabia), small businesses and ethnic restaurants through storytelling campaigns.
 - Visit Laguna Beach launched a campaign titled [“From Radical Origins,”](#) which showcases the untold stories of the local creatives who have shaped the arts and culture scene in Laguna Beach and features podcast episodes videos that highlight different stories from the community.
 - Visit Philadelphia launched the [“Love + Grit”](#) podcast series to tell the diverse and authentic stories of the city to inspire travelers and locals to visit (or re-visit) the area.
- Develop comprehensive marketing and promotional materials focused on the region’s arts and cultural offerings, including cultural focused travel itineraries and digital platforms that highlight prominent cultural experiences and offerings, such as Mission San Juan Capistrano and Orange County Museum of Art.
- Create a signature art piece, or permanent installation, that can be associated with the Orange County region, such as Cloud Gate (i.e., The Bean) in Chicago, or the LOVE Sculpture in Philadelphia. Promote lesser-known cultural neighborhoods and establishments to guests, diversifying visitor experiences and managing demand in over-touristed areas.
 - Leverage the proximity of Westminster to Anaheim’s major attractions and hotels to recommend restaurants and attractions in the Little Saigon neighborhood.

- Leverage food tourism to promote small businesses and cultural neighborhoods throughout the region and feature Orange County's renowned restaurants in publications, marketing and messaging, including highlighting the region's notable strengths in areas such as Vietnamese, Hispanic and Middle Eastern cuisine.
 - This aligns with the [Travel Santa Ana Strategic Plan](#), which aims to promote Santa Ana as a food and beverage destination.
- Build and maintain artist-in-residence programs at additional venues across the region, including hospitality businesses.



Carnegie Plaza, Anaheim

Events and festivals

The Orange County region features a robust events calendar with diverse event offerings. Noteworthy events include the OC Fair, Festival of Arts, Ohana Fest, Pacific Airshow and various holiday-themed events at the Disneyland Resort and Knott’s Berry Farm. These events, among others, have a significant positive economic impact and drive overnight visitation. The OC Fair attracts over one million visitors each year and is estimated to generate an annual economic impact of approximately \$300 million.

Despite the region’s diverse events calendar the region offers a limited number of events that are classified as “national” draws and no “international” draws according to [JLL’s event matrix](#). Approximately 50% of the most significant OC events attract regional demand, while the remainder were categorized as “must see if in the area” or “interesting to do on a repeat visit.” Targeted regional events may generate limited room nights and spending in the communities where they are located; however, they do not have a significant impact on the destination brand outside of the region.

The region may benefit from the development of large events and festivals capable of driving demand from domestic and international visitors, as indicated by approximately 50% of respondents in the stakeholder survey. Given the significance of the Latino and Hispanic population in the region and Southern California, the opportunity exists to develop a branded regional experience and calendar of events centered around the celebration of the history and culture of the U.S. Latino and Hispanic communities.

Further, the region’s events predominantly occur during peak visitation periods, creating an opportunity to strategically increase demand for overnight accommodations during off-peak times. Efforts to increase demand for overnight accommodations during off-peak periods can help the region fill seasonal gaps and enhance its position as a dynamic destination that offers compelling reasons to visit throughout the year.

Key partners

OCBC, California Arts Council, Arts Orange County, Anaheim Convention Center, Garden Amphitheater, Honda Center, House of Blues, Disneyland Resort, Knott’s Berry Farm, Anaheim Convention Center, OC Fair & Event Center, OCVIBE, Great Park Ice & FivePoint Arena, Irvine Great Park

Strategies

- Implement JLL’s event matrix, which assesses an event’s current and future potential to drive measurable impact on the destination and includes specific criteria that is laid out in detail in the [Appendix](#) section of this report.
 - The event matrix can be tailored to consider seasonal factors and short-term opportunities, enabling strategic event planning in conjunction with other activities throughout the year.
- Organize and develop additional signature events that can become annual draws, encouraging multiday attendance and overnight stays (e.g., music festivals, culinary events, cultural heritage events).
 - This aligns with the [Travel Santa Ana Strategic Plan](#), which aims to explore the creation or expansion of events that are aligned with the diversity and creativity of the community and destination brand.
- Expand existing events across the broader region by developing complementary events, activities, shows and exhibitions throughout the region. For example:
 - The [Fiestas Patrias](#) event held annually during Santa Ana Hispanic Heritage Month, which can be expanded to include other parts of the region and incorporated into an extended celebration of Hispanic Heritage Month.
 - Additional events that could be expanded include the Disneyland Resort’s Lunar New Year Celebration and Food & Wine Festival, [Ohana Festival](#) in Dana Point and [Pageant of the Masters](#) in Laguna Beach.

- Create neighborhood-focused food festivals like [626 Night Market](#) in Los Angeles.
- Establish a centralized calendar to aggregate all events in the Orange County region, ensuring cohesive communication and promotion.
- Leverage the region's favorable climate and natural assets to develop and offer unique conference venues and events, such as the [Future Proof Festival](#) in Huntington Beach, which hosted approximately 4,500 attendees in the wealth management, asset management and finance industries for a networking event held entirely outdoors adjacent to the beach.
- Utilize large local parks and venues that are recently completed or anticipated to be completed in the near term (e.g., Great Park, OCVIBE) to host large scale events capable of driving overnight visitation.



Disneyland Resort

2 Improve tourism-related transportation infrastructure

Transportation

Tourism stakeholders have indicated that transportation is a key area of concern across the Orange County region. According to [JLL's Stakeholder Survey](#), traffic/roadway congestion was cited as the No. 1 weakness to regional tourism by 55% of respondents. Additionally, approximately 90% of respondents ranked the quality of public transportation in the region as a three out of five or lower, with one being very weak and five being very strong. Continuous enhancements to the region's transportation infrastructure are critical due to the region's expanding population, growing tourism industry and the economic necessity of connecting the diverse cities of the region. Municipalities and private tourism businesses within the region have historically adopted individualized transportation strategies to address the needs of residents and visitors. For example:

- Huntington Beach offers eco-friendly shuttle service through [Circuit](#) that provide riders with all-electric shared vehicle transportation to the main hotels, attractions, shops and restaurants within the city.
- [Laguna Beach Trolley](#) is a free service from the city running between North Laguna Beach and Dana Point.
- Private entities, such as hotels, often offer targeted transit solutions such as exclusive shuttles to major venues including the airport or Disneyland Resort to improve connectivity and the overall guest experience.

With the enhanced focus on transportation infrastructure solutions in preparation for the LA 2028 Summer Olympics, the opportunity exists to leverage ongoing planning and available funding to permanently enhance the region's transportation infrastructure in a manner that will benefit both residents and visitors. Prioritizing connectivity, enhancing non-vehicular travel options and shifting away from car-dependence are critical to developing an efficient transit system that benefits residents, visitors and members of the local workforce.

Given the ongoing investments and significance of public transportation to the visitor experience, it is crucial that tourism stakeholders participate in public transportation meetings and forums in the region. Tourism stakeholders can use these forums to advise on topics such as transit service planning, transit routes and scheduling, and assist transit authorities in addressing visitor needs. For example, stakeholders have highlighted the need to enhance connectivity between coastal cities (e.g., Huntington Beach, Laguna Beach, Newport Beach, etc.) and inland areas (e.g., Santa Ana, Anaheim, Buena Park, etc.).

Key partners

OCBC, Orange County Transportation Authority, Anaheim Transportation Network, Southern California Association of Governments, Metrolink, Laguna Beach Trolley, Irvine CONNECT, OC Streetcar, OC Bus, Circuit Electric Shuttle, Amtrak Pacific Surfliner, Anaheim Regional Transportation Intermodal Center, Santa Ana Regional Transportation Center

Strategies

- Raise visitor awareness of alternative transportation solutions (e.g., micro transit, ridesharing, shuttles, autonomous vehicles) to enhance accessibility for tourists and commuters.

- Participate in the OCTA's long-range strategic planning process that occurs every four years (including the next session scheduled for 2025) and other strategic visioning sessions with OCTA.
 - This aligns with the [Visit Newport Beach Destination Business Plan](#), which identifies enhanced visitor transportation options as a key opportunity for the region.
- Leverage the LA28 Summer Olympics as a catalyst for the development of transportation infrastructure improvements that can be operated beyond the event itself and enhance the destination's livability and appeal for both residents and visitors.



Dana Point

John Wayne Airport (SNA)

SNA, located in Santa Ana, California, is a medium-sized airport serving as a key gateway to Southern California and a convenient alternative to the busier Los Angeles International Airport. SNA features 20 commercial airline gates within its main passenger terminal.

The airport is governed by the County of Orange and falls under the jurisdiction of the Orange County Board of Supervisors. SNA is managed by the Orange County Airport Commission, which serves in an advisory role, providing recommendations to the Board of Supervisors on matters related to the airport. These governance structures play a critical role in shaping the strategic direction and operational priorities of SNA. The airport operates under a maximum annual passenger cap through 2030, a measure put in place to address community concerns about noise and traffic. The cap currently limits the annual passenger count to approximately 11.8 million and may increase to 12.2 million or 12.5 million passengers in 2026 subject to achieving specific performance thresholds. As such, SNA is currently navigating a period of strategic planning and community engagement to address its future capacity and operational needs in advance of a potential change in the passenger cap in 2026 and 2030.

As a key transportation hub, SNA is working to expand its services and infrastructure to accommodate the growth of the region. Efforts are being made to enhance the customer experience, with initiatives to introduce CLEAR services, improve transportation options and create a welcoming environment for visitors.

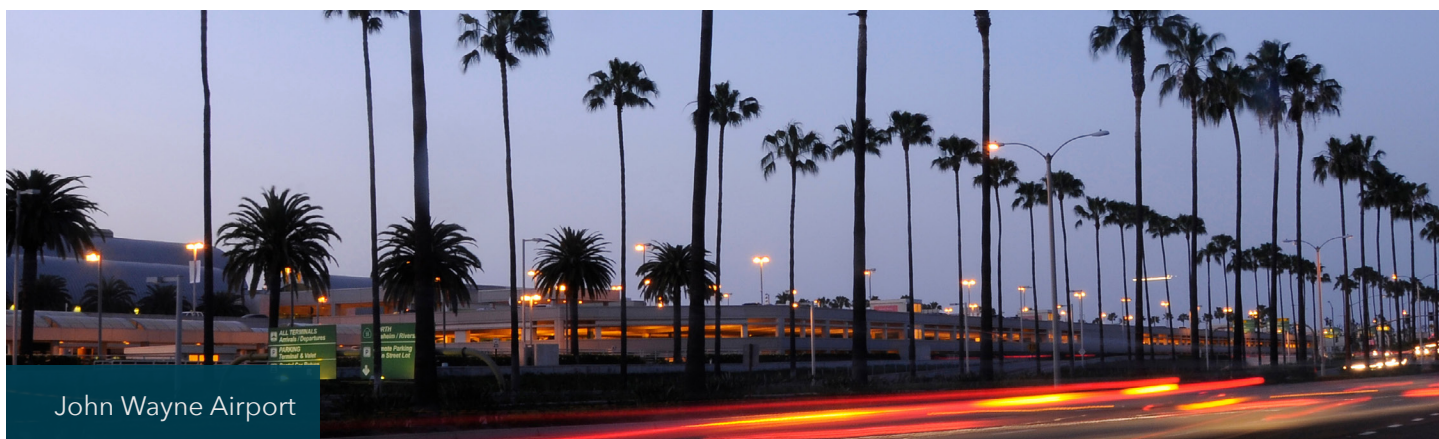
Given the significant planned growth at SNA and the potential impact on visitation and visitor experience, it is crucial that tourism industry stakeholders provide input in key areas. Critical discussion topics include infrastructure investments and passenger count limits in advance of upcoming passenger cap discussions for 2026 and beyond. Tourism stakeholders can also leverage public meetings and forums to advise on the expansion of air service routes, with a particular focus on longer haul markets such as the East Coast, international markets and other strategic destinations that can drive greater overnight visitation, length of stay and visitor spending.

Key partners

Orange County Airport Commission, John Wayne Airport (SNA)

Strategies

- Consider branding and naming opportunities to enhance SNA's geographic recognition and connection to the Orange County market.
- Promote SNA to inbound travelers as a more convenient gateway to Southern California by highlighting the convenience relative to larger airports and proximity to neighboring areas such as Los Angeles and San Diego.



3 Support workforce development

Tourism stakeholders have indicated that workforce availability is a challenge across the region's hotels, restaurants, attractions and other tourism businesses. The Orange County [Stakeholder Survey](#) revealed that 65% of respondents reported experiencing challenges related to hiring — both in the recruitment and attraction of employees — in the tourism industry. Labor availability was also highlighted as the No. 1 obstacle for tourism in the region, with approximately half of respondents identifying it as a significant threat to the industry.

As a result, many representatives from hospitality and tourism-related businesses have a shared goal to promote hospitality and tourism as a promising career path. Further, industry stakeholders have emphasized the importance of workforce training in the tourism sector to elevate the guest experience in the region. By focusing on workforce training and promoting the value of careers in the tourism industry, the region can enhance the long-term success and sustainability of its tourism industry.

Key partners

Tourism Diversity Matters, UC Irvine, Cal State Fullerton, Cal Poly Pomona, Saddleback College, OC United Way, American Hotel and Lodging Association, California Restaurant Association Foundation, OC Workforce Development Board (OCWDB)

Strategies

- Increase the available workforce by leveraging existing apprenticeship programs, such as the [American Hotel and Lodging Association Foundation Apprenticeship Program](#) and Tourism Diversity Matters (TDM) Apprenticeship Program in one or more of the three distinct career tracts: a destination track, a sports track, and a meetings and events track.
- Partner with local educational institutions (e.g., Cal State Fullerton, UC Irvine, Cal Poly Pomona, Saddleback College), vocational training centers, local nonprofit groups (e.g., Orange County United Way) and industry associations (e.g., California Restaurant Foundation, Tourism Diversity Matters) to create specialized programs that prepare individuals for careers in tourism and hospitality.
- Establish paid internship and mentorship opportunities for students that provide hands-on experience and career pathways within the industry.
- Establish certificate programs and/or continuing education programs to enhance the skills and knowledge of the current and future workforce in tourism and hospitality.
- Establish and/or expand workforce development programs tailored to private tourism businesses. Leverage successful examples, such as the [Disney Aspire](#) program, which partnered with Cal State Fullerton and Fullerton College to provide coverage of tuition and other expenses for full-time and part-time cast members.

- Leverage existing programs, such as OC Workforce Development Board (OCWDB) [Senior Employment Program](#), to train retired individuals across the region in tourism-related positions.
- Expand [Visit Anaheim's Workforce Development](#) program to other areas of the region to provide students opportunities to learn about career options in the hospitality and tourism industry, network with industry professionals and explore opportunities for employment (including internships).
- Implement a region wide initiative to train tourism ambassadors on the Orange County region.
 - One such program is the [Visit Anaheim Certified Tourism Ambassador Program](#) training initiative. Tourism ambassadors can deliver exceptional visitor satisfaction and enhance visitor knowledge of the offerings of the broader Orange County region when deployed in key locations (e.g., John Wayne Airport, Angels Stadium, Downtown Disney District, downtown Laguna Beach, South Coast Plaza) and at large events.

4 Enhance regional marketing and messaging

Known for its iconic beaches, luxury shopping and family-friendly theme parks, the Orange County region presents itself as a quintessential Southern California destination. The destination's offerings extend beyond these well-known facets, and include a diverse cultural landscape with vibrant arts scenes, eclectic dining options and a variety of unique attractions.

While the region benefits from strong brand recognition domestically, approximately 40% of respondents ranked the tourism brand strength of the region a three out of five or lower, according to JLL's Stakeholder Survey. Similarly, enhanced marketing strategy (e.g., increased presence on social media, increased marketing budget) was cited as a top three resource-related need by approximately one-third of survey respondents.

The opportunity exists to strengthen the overall brand of the Orange County region by unifying its varied communities and attractions under a cohesive brand identity that resonates with both domestic and international visitors and by highlighting its lesser-known cultural and natural assets and diversity of experiences. The region should consider enhancing and promoting an Orange County regional brand that reflects the diversity of the region. Efforts to refine and communicate a more comprehensive brand narrative could further enhance the region's appeal and drive tourism growth. These opportunities align with themes from multiple strategic tourism plans in the region, as well as conversations with the regional advisory committee, stakeholder interviews and more.

Key partners

Visit Anaheim, Visit Laguna Beach, Visit Buena Park, Visit Huntington Beach, Travel Costa Mesa, Visit Newport Beach, Visit Dana Point, Travel Santa Ana, Destination Irvine

Strategies

- Develop a cohesive and unified brand identity for the Orange County region that promotes the diversity of experiences and attractions across the region while maintaining the region's individual destination identities.
 - Highlight the collective appeal of the region as a premier tourist destination, while also displaying the unique attributes of each locality.
 - Enhance promotional and branding opportunities across individual cities and destinations to promote complementary experiences and sub-areas within the region (e.g., coastal Orange County or Orange County beaches).
 - Visit Anaheim and Travel Costa Mesa have a partnership to cross-promote each region's anchor attraction, Disneyland Resort and South Coast Plaza, respectively, in their marketing efforts.
 - Similarly, in the neighboring Inland Empire region, the [10 Lake Valley](#) marketing initiative combines eight destinations in Southwest Riverside County under one common identity.
- Develop themed regional itineraries that cater to various interests, such as family activities, culinary explorations, outdoor adventures and cultural experiences, to guide visitors through the region's diverse attractions. Promote lesser-known sites and experiences within these itineraries to balance visitor distribution throughout the region.

The Resort at Pelican Hill, Newport Beach

Conclusion

The development of the orange county regional recommendations represents a significant milestone in the collaborative effort to enhance and sustain the region’s tourism industry. Through extensive stakeholder engagement, comprehensive research and strategic analysis, this report will help to guide the region toward a more vibrant, sustainable and economically prosperous future.

The process of creating these recommendations has been marked by dedication, innovation and a shared vision among diverse stakeholders. From DMOs and economic development agencies to arts councils, cultural organizations, attractions operators, transportation entities, airport authorities, hoteliers, restaurateurs, retail representatives, sustainability organizations and more, the input and expertise of numerous partners have shaped a plan that is both ambitious and achievable.

The key priorities identified—Tourism Product Development, Tourism-Related Transportation Infrastructure, Workforce Development, and Regional Narrative—form the foundation of our strategy. Each priority is supported by actionable recommendations and strategies, ensuring that the plan is not just aspirational but implementable.

The road ahead may present challenges, but it also offers tremendous opportunities for growth, innovation and positive change. By staying true to the region’s vision and values, the Orange County region can exceed expectations and stand as a model for sustainable tourism development.

The project team extends gratitude to all who contributed their time, insights and passion to this process. Your involvement has been crucial in developing strategies that truly reflect the needs and aspirations of the Orange County region.



Appendix

Regional advisory committee members

JLL extends its heartfelt appreciation to the entire Visit California team, the dedicated members of the Regional Advisory Committee, as well as the stakeholders and partners across the community who actively participated in the Regional Strategic Tourism Planning process for the Orange County region. Without their unwavering support and commitment, this plan would not have been possible. Thank you all for your contributions.

Name	Organization
Alice Rogan	Orange County Transportation Authority
Alison Edwards	OC Human Relations
Bharat Patel	Anaheim Castle Inn and Suites
Brian Chuan	South Coast Plaza
Charlene Reynolds	John Wayne International Airport
Chris Boucly	Orange County Transportation Authority
Eric Watkins	Disneyland Resort
Gary Sherwin	Visit Newport Beach
Jeff Ball	Orange County Business Council
Karalee Darnell	Disneyland
Kelly Miller	Visit Huntington Beach
Kurt Bjorkman	The Ranch at Laguna Beach
Mike Waterman	Visit Anaheim
Rachel O'Neil-Cusey	JNS Next Laguna Beach
Sara Copping	Visit Buena Park
Sharbie Higuchi	Festival of Arts
Wendy Haase	Travel Santa Ana

Engaged destination marketing organizations and convention and visitors bureaus

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

Organization
Visit Anaheim
Visit Laguna Beach
Visit Buena Park
Visit Huntington Beach
Travel Costa Mesa
Visit Newport Beach
Visit Dana Point
Travel Santa Ana
Destination Irvine



Crystal Cove, Newport Beach

Destination plans review database

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

City/County	Name of plan
Aliso Viejo	City of Aliso Viejo General Plan
Anaheim	City of Anaheim General Plan
Brea	City of Brea General Plan
Buena Park	Buena Park 2035 General Plan
Costa Mesa	City of Costa Mesa 2015-2025 General Plan Update
Costa Mesa	Visit Costa Mesa Strategic Plan
Cypress	City of Cypress Final General Plan Update
Dana Point	City of Dana Point General Plan
Fountain Valley	Fountain Valley General Plan Update
Fullerton	City of Fullerton General Plan
Garden Grove	City of Garden Grove General Plan
Huntington Beach	City of Huntington Beach General Plan
Huntington Beach	Visit Huntington Beach Strategic Plan
Irvine	City of Irvine General Plan
La Habra	City of La Habra General Plan 2035
La Palma	La Palma General Plan
Laguna Beach	Laguna Beach General Plan
Laguna Beach	Visit Laguna Beach Strategic Plan
Laguna Hills	Laguna Hills General Plan
Laguna Niguel	City of Laguna Niguel General Plan
Laguna Woods	Lake Forest 2040 General Plan
Lake Forest	Lake Forest 2040 General Plan
Los Alamitos	City of Los Alamitos General Plan
Mission Viejo	Mission Viejo General Plan Program
Newport Beach	City of Newport Beach General Plan
Newport Beach	Visit Newport Beach Strategic Plan
Orange	City of Orange — 2010 General Plan
Placentia	Placentia General Plan
Rancho Santa Margarita	Rancho Santa Margarita General Plan

Destination plans review database (cont.)

City/County	Name of plan
San Clemente	City of San Clemente Centennial General Plan
San Juan Capistrano	San Juan Capistrano General Plan
Santa Ana	Santa Ana General Plan
Santa Ana	Travel Santa Ana Strategic Plan
Seal Beach	City of Seal Beach General Plan
Stanton	City of Stanton General Plan
Tustin	City of Tustin General Plan
Villa Park	City Villa Park 2017 General Plan
Westminster	Westminster General Plan
Yorba Linda	2016 Yorba Linda General Plan

Focus group attendees

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

Name	Organization
Alexa Garcia	Disneyland Resort
Alice Rogan	Orange County Transportation Authority
Amanda Shewan	Outlets at Orange
Ana Laura Padilla	Perla Mexican Cuisine
Andrew Fahmy	Orange County United Way
Annette Anderson	Holiday Inn Orange County Airport
Belinda Trani	Karmel Shuttle Service
Brett Barnes	Duke's Restaurant, Visit Huntington Beach
Brian Applegarth	Cannabis Travel Association International
Brian Chuan	South Coast Plaza
Camilo Bruce	Courtyard Anaheim Buena Park
Candace Chromy	Heritage Museum of Orange County
Cat Decker	Friends of Santa Ana Zoo
Cherie Whyte	Discovery Cube
Chris Bennett	Anaheim Packing District
Christina Dawson	Visit Anaheim
Christine Knadler	Caltrans District 12
Christy Tran	Inland Economic Growth & Opportunity, Governor's Office of Business and Economic Development
Dave Elliott	Santa Ana Chamber of Commerce
Debbie Killey	Republic Services
Diana Kotler	Anaheim Transportation Network
Donna Kalez	Dana Wharf Whale Watching & Sportfishing
Ed Mountford	Cornerstone Real Estate Consulting
Eddie Quillares	Santa Ana Chamber of Commerce
Eric Freed	John Wayne International Airport
Eric Morgan	FivePoint Holdings, LLC
Eric Watkins	Disneyland Resort
Frank Atayde	Holiday Inn Orange County Airport
Gaby Lomeli	Santa Ana Regional Transportation Center
Gary Maggetti	Disney California Adventure Park West, California Restaurant Association
Gary Sherwin	Visit Newport Beach
Glenn Gray	Pacific Marine Mammal Center
Gloria Sefton	Friends of Harbors, Beaches, and Parks
Greg Blodgett	City of Garden Grove
Greg Scott	Community Action Partnership Orange County

Focus group attendees (cont.)

Name	Organization
Hawk Scott	City of Santa Ana
Heather Johnston	Visit Dana Point
Jacob Raykhelson	Disneyland Resort
Javier Solis	DoubleTree Buena Park
Jeff Gahagan	Knott's Berry Farms
Jeff Leuenberger	Angel Stadium
Jeffrey Gross	Holiday Inn Santa Ana
Jennifer Williams	Centennial
Jesse Ben-Ron	Orange County Business Council
Joanna Bear	Surf & Sands Resort
John Kirkham	Disneyland Resort
Jon Sanchez	Native Son
Jordan Harding	City National Grove of Anaheim, Nederlander Concerts
Julie Perlin Lee	Laguna Art Museum
Julie Tilley Barlow	SWCA Environmental Consultants
Julio Duran	Pirates Adventure Dinner
Justin Simpson	Kimpton Shorebreak
Katie Pederson	ocV!BE Sports and Entertainment
Kelly Alesi	Second Harvest Food Bank of Orange County
Kelly Bishop	Bowers Museum
Kelly Miller	Visit Huntington Beach
Kevin Gidden	Disneyland Resort
Kurt Bjorkman	The Ranch Hotel Laguna Beach
Linda Sadeghi	The LAB
Lisa Middleton	Seegerstrom Center for the Arts
Logan Crow	The Frida Cinema
Mark Orgill	City of Laguna Beach
Mary Anne Foo	Orange County Asian and Pacific Islander Community Alliance
Matt Foulkes	City of Buena Park
Melissa Haley	City of Irvine
Michele Richards	OC Fair & Event Center
Mike Garcia	City of Santa Ana Community Development
Mike Lyster	City of Anaheim
Mindy Abel	Anaheim Convention Center
Misty Bond	Destination Irvine
Monique Davis	Buena Park Collaborative
Nicole Llido	Visit Huntington Beach

Focus group attendees (cont.)

Name	Organization
Nora Yeretzian	Orange County Transportation Authority
Paul Sanford	Wincome Hospitality
Paulette Lombardi-Fries	Travel Costa Mesa
Pedro Goite	Medieval Times
Pepe Avila	Visit Anaheim
Pete Truxaw	Mama's Hospitality Group
Peter Rice	Hyatt Regency Huntington Beach Resort and Spa
Rachel O'Neill-Cusey	Visit Laguna Beach
Rhanda Richardson	JW Marriott, Anaheim Resort
Robert Koscelnik	Hilton Irvine
Robert Kravitz	Sheraton Agoura Hills Courtyard by Marriott Santa Ana, Travel Santa Ana
Robyn MacNair	Santa Ana Unified School District
Rolondo Talbott	Disney Experiences
Sara Copping	Visit Buena Park
Sharbie Higuchi	Festival of Arts, Pageant of the Masters
Sheri Candler	Metrolink
Steve Churm	Churm 360 LLC
Steven Oh	Related California
Sylvia Vazquez	City of Santa Ana
Tam Nguyen	Little Saigon
Tim McGrath	Orange County Regional Consortium, Workforce Development
Tom Koutroulis	OC Waste & Recycling
Wendy Haase	Travel Santa Ana

Stakeholder interviewees

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

Name	Organization
Alexa Garcia	Disneyland Resort
Alice Rogan	Orange County Transportation Authority
Ana Laura Padilla	Perla Mexican Cuisine
Andrew Fahmy	Orange County United Way
Aram Chaparyan	City of Torrance
Ayn Craciun	Climate Action Campaign
Brett Barnes	Duke's Restaurant, Visit Huntington Beach
Brian Applegarth	Cannabis Travel Association International
Brian Chuan	South Coast Plaza
Cat Decker	Friends of Santa Ana Zoo
Charlene Reynolds	John Wayne International Airport
Cherie Whyte	Discovery Cube
Chris Bennett	Anaheim Packing District
Christina Dawson	Visit Anaheim
Cory Sams	Westfield MainPlace Mall
Darrell Johnson	Orange County Transportation Authority
Dave Elliott	Santa Ana Chamber of Commerce
Debbie Killey	Republic Services
Derek Breaux	Laguna Canyon Foundation
Devon Reeves	Anaheim Packing District
Diana Kotler	Anaheim Transportation Network
Don Prescott	Knott's Berry Farm Hotel
Donna Kalez	Dana Wharf Whale Watching & Sportfishing
Dr. Nathan Gregory	Irvine Ranch Conservancy
Dyana Peña	Orange County Coastkeeper
Ed Mountford	Cornerstone Consulting
Eddie Quillares	Santa Ana Chamber of Commerce
Elizabeth Wade	Orange County Transportation Authority
Eric Freed	John Wayne International Airport
Eric Lopez	City of Costa Mesa
Eric Morgan	FivePoint Holdings, LLC
Erin Hamant	City of Santa Ana
Eric Watkins	Disneyland Resort
Estrella Sainburg	Juan Bautistia de Anza National Historic Trail

Stakeholder interviewees (cont.)

Name	Organization
Evan Thomason	City of Santa Clarita
Frank Atayde	Holiday Inn Orange County Airport
Gaby Lomeli	Santa Ana Regional Transportation Center
Gary Maggetti	Disney California Adventure Park West, California Restaurant Association
Glenn Gray	Pacific Marine Mammal Center
Gloria Sefton	Friends of Harbors, Beaches, and Parks
Greg Blodgett	City of Garden Grove
Gregory Scott	Community Action Partnership Orange County
Hawk Scott	City of Santa Ana
Jacob Raykhelson	Disneyland Resort
Jeff Gahagan	Knott's Berry Farms
Jeff Leuenberger	Los Angeles Angels
Jeffrey Gross	Holiday Inn Santa Ana
Jeffrey Jensen	Chapter One
Jim Luttjohann	Surf & Sand Resort
John Kirkham	Disneyland Resort
Jonathan Whitehead	Howard Johnson Hotel Water Playground
Julie Buettner	Courtyard Costa Mesa South Coast Metro, Travel Santa Ana
Julie Perlin Lee	Laguna Art Museum
Karalee Darnell	Disney Resort
Kaitlin Drisko	Anaheim Castle Inn and Suites
Karyn Philippsen	K.P. Company, Visit Laguna Beach
Kathleen Ramirez	John Wayne International Airport
Katie Pederson	ocV!BE Sports and Entertainment
Kelly Alesi	Second Harvest Food Bank of Orange County
Kevin Gidden	Disneyland Resort
Lexi Hernandez	Climate Action Campaign
Linda Sadeghi	The LAB
Lisa Middleton	Segerstrom Center for the Arts
Mark Orgill	City of Laguna Beach
Mary Anne Foo	OC Asian & Pacific Island Community Alliance (OCAPICA), Irvine DEI Committee
Matt Foulkes	City of Buena Park
Melanie Schlotterbeck	Friends of Harbors, Beaches, and Parks
Melissa Haley	City of Irvine
Michael Giddens	Pacific Coachways Charter Services
Michele Richards	OC Fair & Event Center

Stakeholder interviewees (cont.)

Name	Organization
Micky Rucireta	Laguna Strategic Advisors
Mike Afran	Karmel Shuttle Service, Southern California Coach
Mike Garcia	City of Santa Ana
Mike Harrah	Caribou Industries
Mike Lyster	City of Anaheim
Mindy Abel	Anaheim Convention Center
Nicole Llido	Visit Huntington Beach
Nora Yeretdzian	Orange County Transportation Authority
Paul Sanford	Wincome Hospitality
Pepe Avila	Visit Anaheim
Pete Carmichael	City of Irvine
Pete Truxaw	Mama's Hospitality Group
Peter "PT" Townsend	ActiveEmpire, Visit Huntington Beach
Ramona Agrela	University of California, Irvine
Rhanda Richardson	JW Marriott, Anaheim Resort
Rick Smetanka	Arts Orange County
Robert Koscelnik	Hilton Irvine
Robert Kravitz	Sheraton Agoura Hills, Courtyard by Marriott Santa Ana, Travel Santa Ana
Robyn MacNair	Santa Ana Unified School District
Rolondo Talbott	Disney Experiences
Ryan Chase	S & A Management, Travel Santa Ana
Sergio Bocci	Hilton Anaheim
Sharbie Higuchi	Festival of Arts, Pageant of the Masters
Sheri Candler	Metrolink
Sona Coffee	City of Irvine
Steve Churm	Churm 360 LLC
Steven Oh	Related California
Susan Santana	Disneyland
Sylvia Vazquez	City of Santa Ana
Tam Nguyen	Little Saigon
Tara Tisopulos	OC Waste & Recycling
Todd Szilagyi	Best-VIP Chauffeured Worldwide
Tom Koutroulis	OC Waste & Recycling

Visited points of interest

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

Point of interest	Location
Anaheim Convention Center	Anaheim
Disneyland Corporate Offices	Anaheim
Great Wolf Lodge Water Park	Anaheim
The Outlets at Orange	Anaheim
Honda Center	Anaheim
Anaheim Packing House	Anaheim
Disneyland Hotel	Anaheim
Visit Anaheim Offices	Anaheim
Downtown Disney District	Anaheim
Disneyland Resort	Anaheim
Buena Park City Hall	Buena Park
Buena Park Historic District	Buena Park
Knott's Berry Farm	Buena Park
Courtyard by Marriott Buena Park/Anaheim	Buena Park
Porto Café	Buena Park
Gacho Grill	Buena Park
The Source	Buena Park
Segerstrom Center for the Arts	Costa Mesa
South Coast Plaza Shopping Center	Costa Mesa
The LAB Anti-Mall	Costa Mesa
The Camp	Costa Mesa
Orange County Museum of Art	Costa Mesa
Vanguard University	Costa Mesa
Philz Coffee	Costa Mesa
Dana Point Harbor	Dana Point
Lantern Bay Park	Dana Point
Dana Point Lantern District	Dana Point
Baby Beach	Dana Point
Dana Point Pier	Dana Point
Mariner's Village	Dana Point
Kimpton Shorebreak Resort	Huntington Beach
Pasea Hotel & Spa	Huntington Beach
The Waterfront Beach Resort, Hilton	Huntington Beach
Hyatt Regency Huntington Beach Resort & Spa	Huntington Beach
Duke's Huntington Beach	Huntington Beach
Broad Street Oyster Bar	Huntington Beach
Huntington Beach Pier	Huntington Beach
Huntington Surf & Sport	Huntington Beach

Point of interest	Location
Jack's Surfboards	Huntington Beach
Surfing Walk of Fame	Huntington Beach
Sunset Beach	Huntington Beach
Irvine Spectrum Center	Irvine
Irvine City Hall	Irvine
UC Irvine	Irvine
Marriott Irvine	Irvine
The Great Park	Irvine
Javier's at the Spectrum Center	Irvine
Surf & Sands Hotel	Laguna Beach
Splashes Restaurant	Laguna Beach
Lumberyard	Laguna Beach
Laguna Beach Visitors Center	Laguna Beach
Visit Laguna Beach Office	Laguna Beach
Newport Beach Pier	Newport Beach
Fashion Island	Newport Beach
Handel's Ice Cream	Newport Beach
Newport Island	Newport Beach
Lido Isle	Newport Beach
Newport Bay	Newport Beach
Doryman's Oceanfront Inn	Newport Beach
Newport Beach Hotel	Newport Beach
Outlets at San Clemente	San Clemente
California Welcome Center — San Clemente	San Clemente
Downtown Santa Ana Artist's Village	Santa Ana
Bowers Museum	Santa Ana
Santa Ana College	Santa Ana
Discovery Cube	Santa Ana
Santa Ana Zoo	Santa Ana
Northgate Market	Santa Ana
Orange County School of Arts	Santa Ana
Bristol Swap Mall	Santa Ana
Tropicana Dispensary	Santa Ana
Casa Bloom Studios	Santa Ana
Seal Beach National Wildlife Refugee	Seal Beach/ Huntington Beach
Seal Beach	Seal Beach/ Huntington Beach

Global destinations’ readiness for sustainable tourism

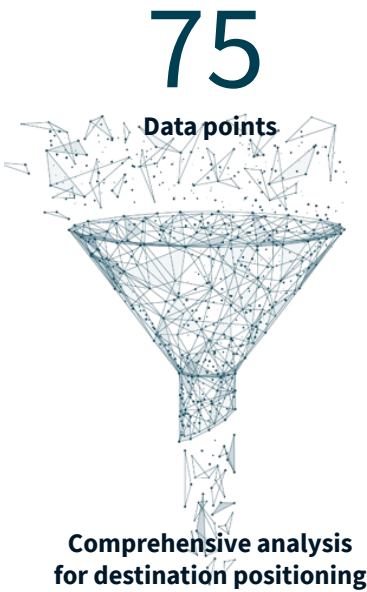
- Tourism readiness index is the product of a partnership between JLL and the World Travel & Tourism Council to assess global cities’ tourism readiness.
- While readiness will depend on the ambitions and goals of every city, WTTC and JLL define tourism readiness as a strategic and all-inclusive approach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

Tourism readiness index

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



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



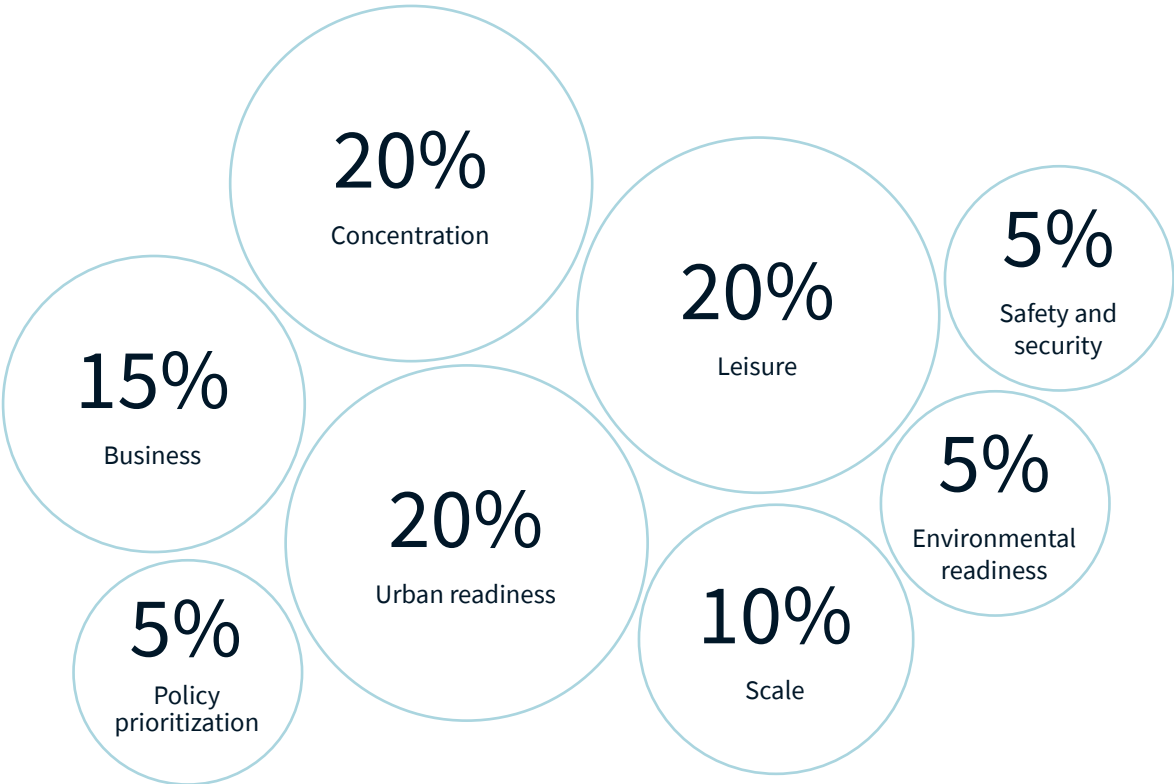
Tourism readiness index categories

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

Levels of readiness | Destination typologies

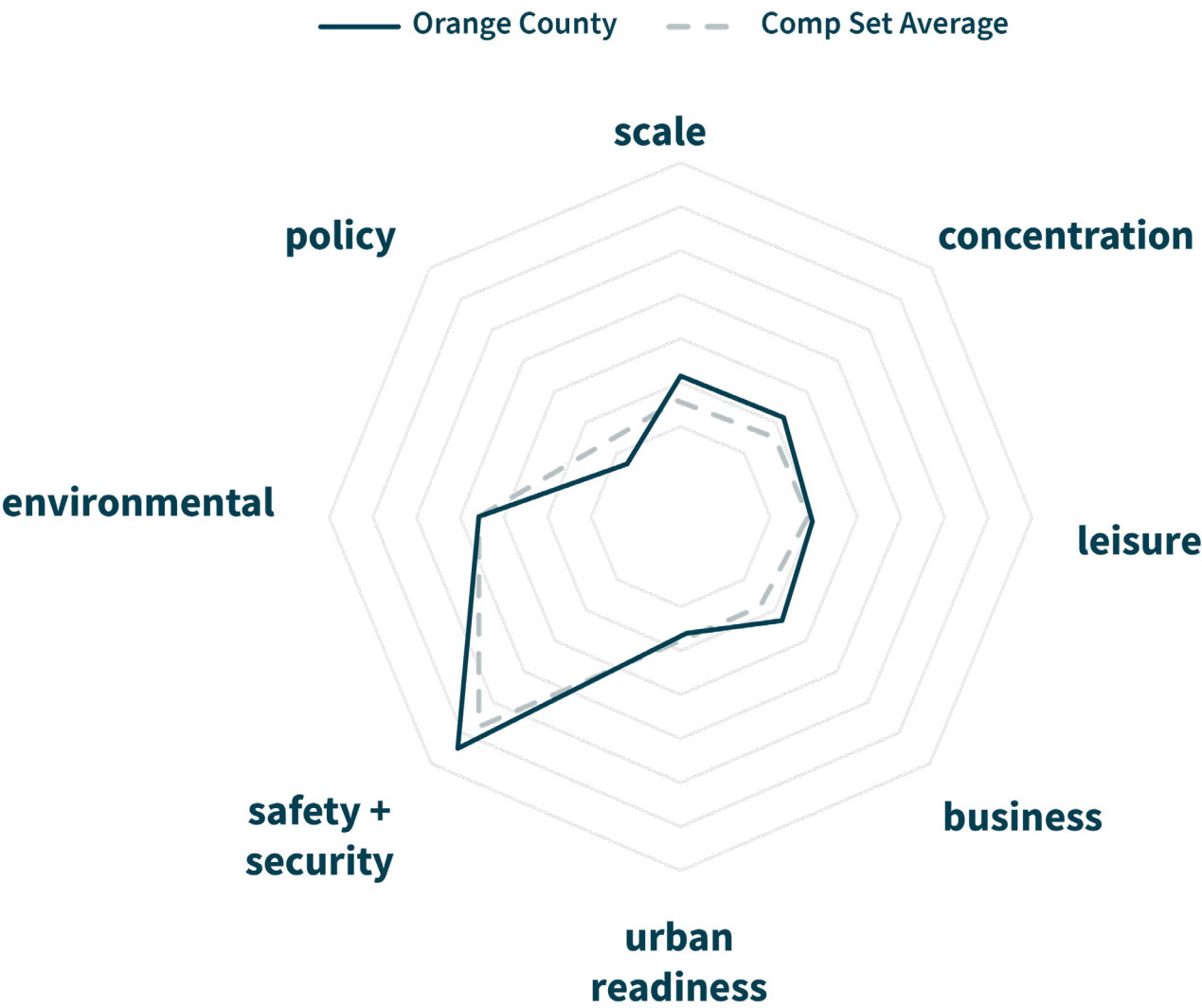
Dawning Developers	Emerging Performers	Balanced Dynamics	Mature Performers	Managing Momentum
Limited tourism infrastructure	Growing momentum	Established infrastructure	Strong leisure and/or business travel dynamics	Historically high growth momentum
Gradual tourism growth	Rising infrastructure	Growth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

Weights by category



The Orange County results

Outcome by pillar



Demand driver scorecard

Process — multistep assessment of destination assets



Use visitor traffic and flow data to assess current demand



Place individual assets on scale based on eight criteria to score



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



Use the outcome to identify future competitive positioning



Recommend new investment or enhancement to grow assets on the scale

Score card elements

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

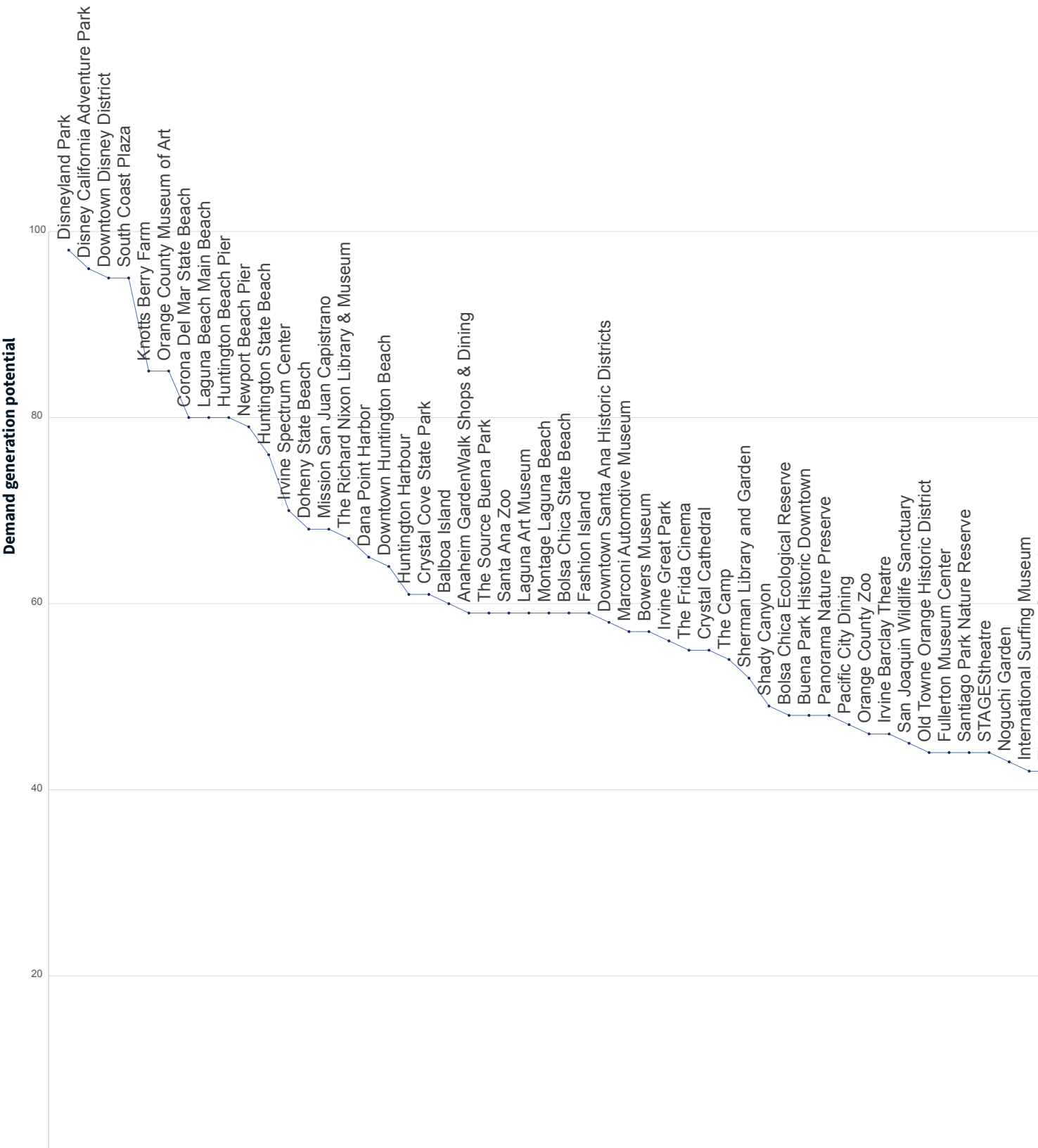
Score Card: Eiffel Tower sample scoring

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

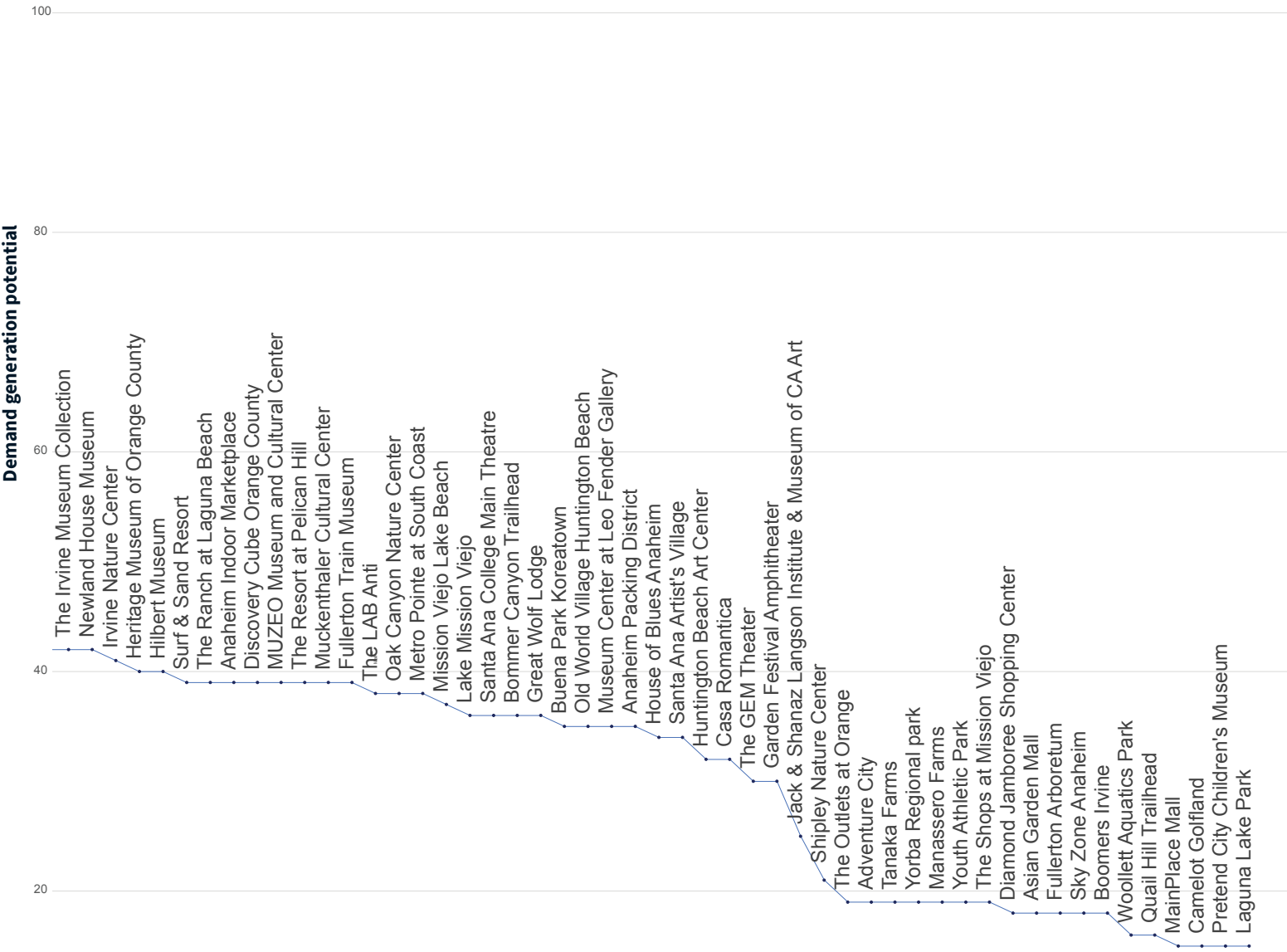


Duffy Boats, Balboa Bay

Orange County demand drivers



Orange County demand drivers



Event matrix

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



Identify key events serviced by the region



Rate events on matrix using 11 criteria



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



Work with organizers on tactics for implementation

Program components

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

Multi-day event

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

Risk

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

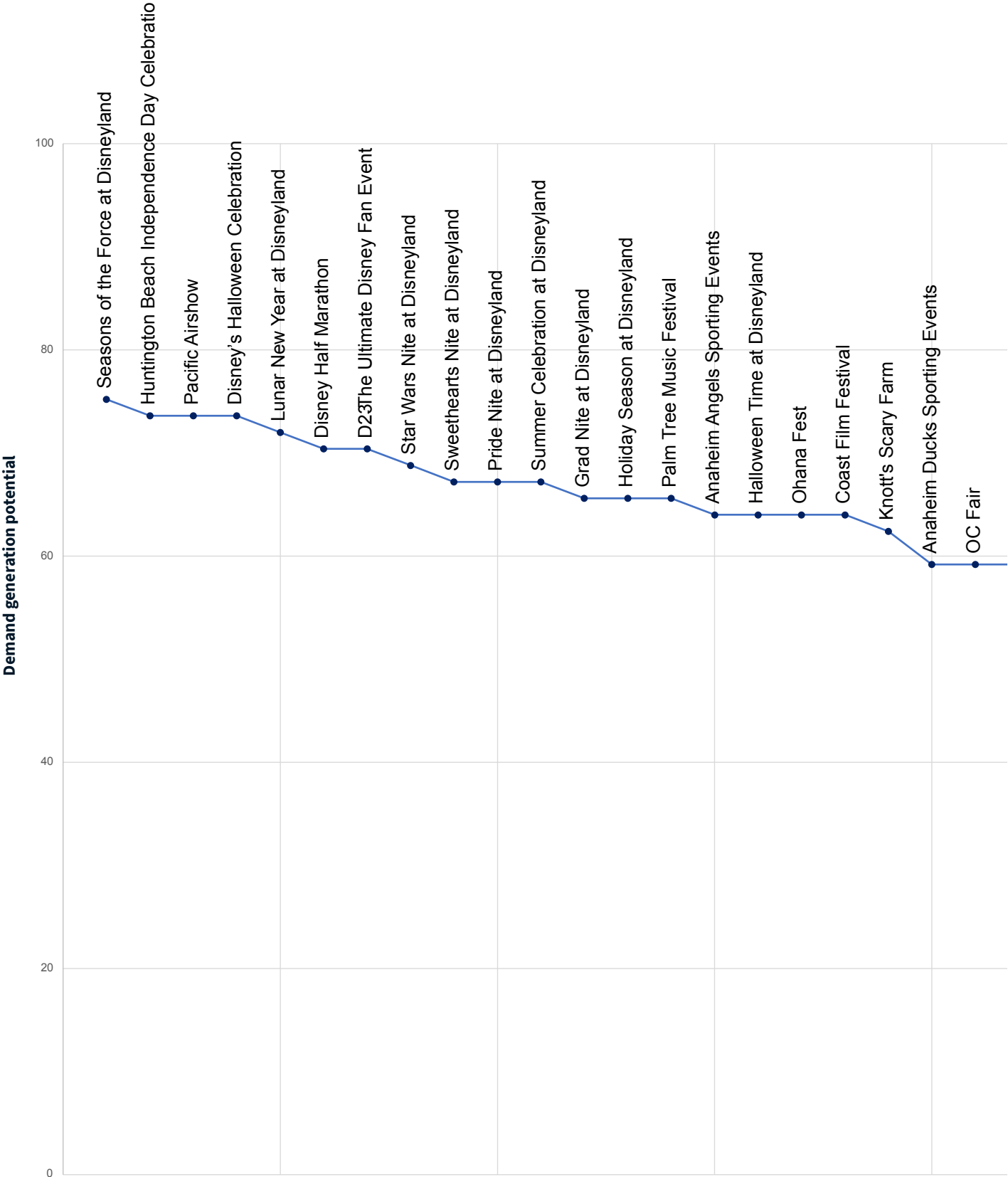


Pelican Hill, Newport Beach

Program components

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

Orange County leisure events



Orange County leisure events

