visit California

Regional strategic tourism plan

San Francisco Bay Area

JLL SEE A BRIGHTER WAY

June 2025

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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

Fitzgerald Marine Reserve, Moss Beach

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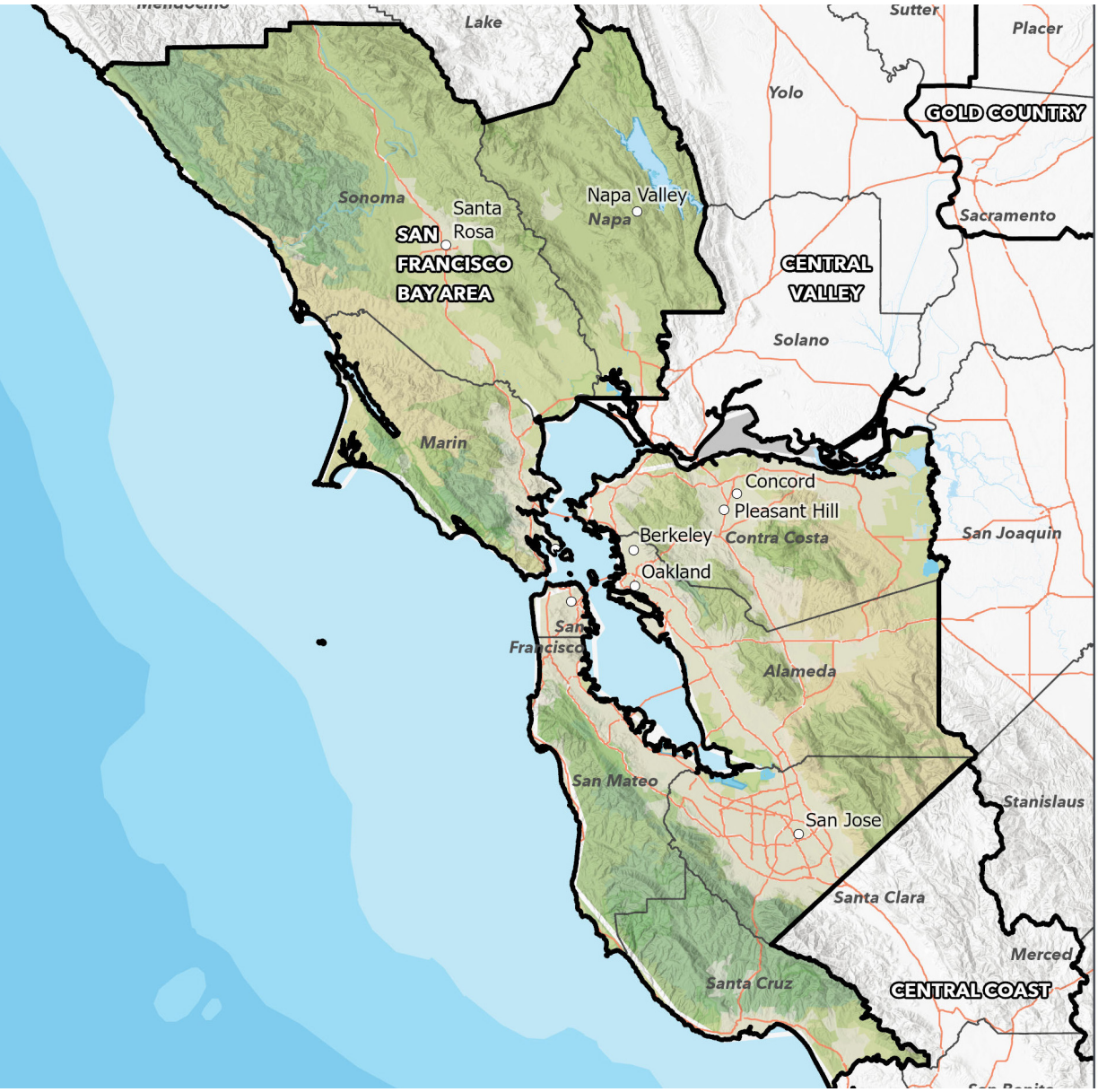
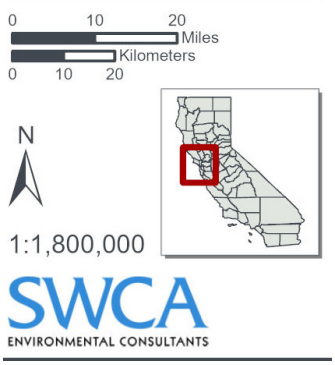
Executive summary

Spanning from Morgan Hill's southern edge to the northern coasts of Marin and Sonoma, the San Francisco Bay Area stands as a top-tier destination. This region captivates visitors with its eclectic mix of attractions, exceptional culinary offerings, famous landmarks and rich cultural tapestry. Comprising nine counties, the area is supported by a network of 17 destination management organizations and tourism departments, working to showcase its multifaceted appeal.





To develop a comprehensive regional tourism strategy, Jones Lang LaSalle (JLL) and Visit California conducted 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 100 individual plans in the San Francisco Bay Area, extensive stakeholder engagement through various methods, including regional advisory committee meetings; tourism stakeholder surveys with over 250 participants; focus groups; individual interviews with more than 150 industry stakeholders; and site visits to over 85 points of interest. Additionally, in-depth regional research and discovery was carried out to inform strategy development.

The research process utilized several proprietary tools and methodologies. The tourism readiness **index** analyzed nearly 4,000 tourism-related data points across 68 indicators. Results showed that the San Francisco Bay Area surpasses state averages in 5 out of 8 of the **index pillars**, particularly in scale, policy, leisure and business readiness. The region is classified as a "mature performer" destination, indicating well-developed tourism infrastructure and a strong track record.

The **demand driver scorecard** evaluated over 180 attractions and experiences in the region. Notably, 55% of the scored assets are generating regional or national demand, with 25 attractions identified as national or worldwide demand drivers. These include popular destinations, such as the Golden Gate Bridge, Pier 39 and Fisherman's Wharf and Alcatraz Island. The analysis also revealed that 87% of assets are family-friendly and 40% are classified as outdoor recreation, highlighting the region's strengths in these areas.

Using the **event matrix** rubric, this report evaluated 65 events across the region, identifying 12 unique events positioned to drive global, national and regional demand. The analysis also revealed a concentration of events during peak seasons, suggesting an opportunity to expand and diversify events into shoulder seasons.

The Ritz Carlton, Half Moon Bay

Based on the research findings and stakeholder input, several strategic priorities have been identified for the San Francisco Bay Area. These priorities are designed to drive sustainable tourism visitation growth while managing the tourism ecosystem to balance resident and visitor needs. The strategic priorities focus on:

1. Invest in tourism product development: focus on cultural tourism, events and festivals, outdoor recreation and hospitality and agritourism.
2. Improve tourism-related transportation infrastructure: enhance public transportation, signage and wayfinding and address last-mile connectivity issues.
3. Support workforce development: leverage existing apprenticeship programs and collaborate with educational institutions for tailored training programs.
4. Enhance regional marketing and messaging: position San Francisco as a gateway city to the broader region and develop campaigns that showcase the area's diversity and cultural richness.

Bodega Bay

These opportunities align with the broader statewide goals and Visit California's focus on sustainable tourism development, economic growth and enhancing visitor experiences while preserving natural and cultural resources. Implementation will require ongoing engagement with stakeholders, including DMOs, local businesses and community organizations.

The San Francisco Bay Area stands at the forefront of tourism innovation, blending its rich culture, technological leadership and natural attractions to create an unparalleled visitor experience. This strategic plan underscores the region's commitment to sustainable tourism growth, emphasizing the delicate balance between economic development, community well-being and environmental stewardship.

JLL and Visit California would like to thank the San Francisco Bay Area Regional Advisory Committee who played a crucial role in this planning process. Their valuable contributions throughout the process were instrumental in shaping this strategic plan. Please refer to the committee participants in the **Appendix**.

Alamo Square Park, San Francisco

Regional research and discovery

To ensure a comprehensive approach to this plan, the San Francisco Bay Area regional strategic plan integrates insights from stakeholder engagement and regional research and discovery to develop a clear vision and strategy. Throughout two years of planning process, extensive regional research and discovery were conducted to gain an in-depth understanding of the current state of the tourism industry and identify potential areas for growth. JLL leveraged both proprietary strategic planning tools, extensive stakeholder feedback and research previously conducted by Visit California to better understand each region. Many of the insights from these findings have been critical to the foundational strategies in this plan.

Outside Lands Festival, Golden Gate Park

The regional research and discovery section includes vast research which has been detailed further and organized under the following categories for the San Francisco Bay Area.

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 San Francisco Bay Area.**
2. **Destination plans review database: data gathering process which included 100 individual plans inventoried; elements include addressing housing, employment, guiding development and preserving existing neighborhoods, protecting the environment, improving pedestrian experience and walkability, reducing commuting out of the city, promoting larger open spaces in specific areas, ensuring a multimodal, sustainable city and much more.**
3. **Stakeholder engagement: this section incorporates feedback from multiple different methods outlined here:**
   - Regional advisory committees: meetings held monthly for approximately 24 consecutive months with a committee consisting of 20-plus members. Please refer to the **Appendix** for a full list of members.
   - Tourism stakeholder survey: over 250 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, 10 in-depth discussions with stakeholders were conducted from 10 different sectors, with over 100 participants in total, including destination management/marketing organizations; lodging, restaurants and retail; arts and culture; agritourism; diversity, equity and inclusion; safety and security; economic development; transportation and connectivity; and workforce and housing. Through these discussions, valuable insights were gathered on specific areas of interest and growth potential.
   - Individual interviews feedback: over 150 key industry stakeholders interviewed, offering a deeper understanding of perspectives and addressing any specific questions or concerns.
   - Site visits: visited 85-plus points of interest throughout the San Francisco Bay Area across 2 weeks, providing valuable insights and observations.
4. **Tourism readiness index: detailed data analysis process which used nearly 4,000 data points to assess the readiness and capacity of the tourism industry in the San Francisco Bay Area.**
5. **Demand driver scorecard: evaluation which 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 San Francisco Bay Area tourism industry, with foundational strategies that are rooted in data, insights and feedback from stakeholders.

State of the region

As a vibrant hub of culture, innovation and scenic beauty the San Francisco Bay Area stands as a premier destination for millions of visitors each year.

Stretching from Morgan Hill in the south to Marin and Sonoma coasts in the north, the region is renowned for its diverse attractions, world-class dining and iconic landmarks, such as the Golden Gate Bridge and Alcatraz Island. The Bay Area includes nine counties and is home to 16 destination management organizations and tourism departments.

In 2023, the San Francisco Bay Area reported total travel spending of $37.7 billion, reflecting a significant 7.5% growth from the previous year. Visitor spending accounted for $31.0 billion, while other travel-related expenditures contributed an additional $6.7 billion.

The region offers myriad activities catering to various interests and budgets, from roaming the lush landscapes of Golden Gate Park to exploring the tech-driven enclave of Silicon Valley. The Bay Area's natural beauty is enhanced by renowned outdoor spaces, such as Muir Woods National Monument and Point Reyes National Seashore, providing ample opportunities for hiking, biking and other recreational activities.

Visit California's Community Sentiment Study showcased the Bay Area's appeal, noting the region's high regard for its restaurants (90%), exceptional climate (89%) and vibrant shopping districts (84%). Top tourist attractions include hiking trails (68%), beaches (68%) and wineries/vineyards (64%). Nearly 60% of residents believe the benefits of tourism outweigh the problems, citing job creation and economic opportunities. However, residents also highlighted concerns regarding traffic and congestion, overcrowding at beaches (18%) and theme parks (16%), which slightly detract from their enjoyment. (Visit California Community Sentiment Study, 2023)

The San Francisco Bay Area's dynamic atmosphere is fueled by its diverse population, representing a mosaic of ethnicities and cultures. From the historic neighborhoods of Chinatown and North Beach in San Francisco to the thriving communities in the East Bay and Silicon Valley, visitors can immerse themselves in a rich tapestry of food, music and art.

Known for its forward-thinking and innovative spirit, the San Francisco Bay Area continues to attract travelers from around the globe, offering a unique blend of natural splendor, cultural richness and cutting-edge technology.

Calistoga Depot

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 destination marketing organizations, convention and visitors 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 100 plans specifically focused on the San Francisco Bay Area region. A full list of the reviewed plans can be found in the **Appendix**.

Upon analysis of the San Francisco Bay Area plans, several key themes were identified that align with the priorities highlighted in the present plan.

1 Economic development and vitality

- Promoting diverse and vibrant local economies
- Supporting local businesses and job creation
- Enhancing downtown areas as destinations
- Developing tourism and visitor-serving amenities

2 Environmental sustainability and conservation

- Protecting open spaces, natural resources and scenic beauty
- Promoting environmental stewardship and climate action
- Developing green infrastructure and sustainable building practices
- Preserving agricultural lands and resources

3 Community character and quality of life

- Preserving small-town charm and unique local identities
- Enhancing public spaces, parks and recreational opportunities
- Supporting arts, culture and historic preservation
- Improving walkability, bike-ability and public transit options

4 Public health and safety

- Improve emergency preparedness and response
- Address natural hazards (earthquakes, flooding, fires)
- Enhance public safety services (police, fire)
- Reduce noise impacts
- Promote healthy lifestyles and active living

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, a thorough site visit and individual meetings with tourism stakeholders, industry leaders and related entities.

Regional advisory committees

Regional Advisory Committees were monthly gatherings composed of industry leaders within culture and heritage; economic development; lodging; resilience and sustainability; attractions; technology; sports; restaurants and retail; wineries; workforce; housing; transportation; and more. Meetings were held monthly for approximately 16 consecutive months. The committee consisted of 20-plus members, of which a full list 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, attractions, etc., suggestions for improvement 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 250 responses from across the San Francisco Bay Area.

Focus groups

Focus groups were conducted to discuss key themes and gather qualitative data. 10 focus groups were conducted with over 100 total participants, including DMOs; lodging; restaurants and retail; arts, culture and heritage; agriculture and agritourism; safety and security; diversity, equity and inclusion; economic development; transportation and connectivity; workforce and housing; and resilience and sustainability. 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 concerned with tourism's potential challenges and impacts on the San Francisco Bay Area. The interview process encompassed over 150 individual interviews, including all members of the regional advisory committee.

Site visits

Multiple visits were conducted to the San Francisco Bay Area region to immerse further in the local environment, engage directly with stakeholders, visit tourism sites and attractions and witness firsthand the dynamics of the tourism industry in the San Francisco Bay Area. Over 85 points of interest were visited throughout the San Francisco Bay Area across two weeks.

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 reflected several major themes within the San Francisco Bay Area region.

- There's potential to create immersive cultural experiences that blend art, technology and local heritage, capitalizing on the region's rich diversity of cultural assets to entice longer stays in the region.
- The San Francisco Bay Area can leverage its tech innovation to enhance cultural tourism offerings, creating unique experiences that set the region apart.
- There's an emphasis on creating a regional calendar for leisure events to better coordinate and promote offerings across the San Francisco Bay Area.
- Enhancing public transportation, signage and wayfinding has been identified as a top improvement needed to positively impact the Bay Area tourism experience.
- Limited last-mile connectivity, especially in areas further from San Francisco like the Sonoma County coast and Morgan Hill, impedes visitor mobility and exploration of the broader region.
- Developing workforce training programs and apprenticeships in the tourism industry can address skill gaps and create career pathways, capitalizing on available funding from the Department of Labor.
- Working with universities and colleges to develop a strong workforce pipeline for the tourism industry can foster innovation through research partnerships.
- The current narrative and perception of San Francisco negatively impact the entire Bay Area region's image.
- There's potential to position San Francisco as a gateway city to encourage visitors to explore the broader region, including destinations like Marin, Sonoma and Napa counties.
- Managing visitor behavior through positive messaging and incentives can help preserve natural and cultural resources, especially in popular areas.

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 and discovery involved an in-depth analysis of the San Francisco Bay Area 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. 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.

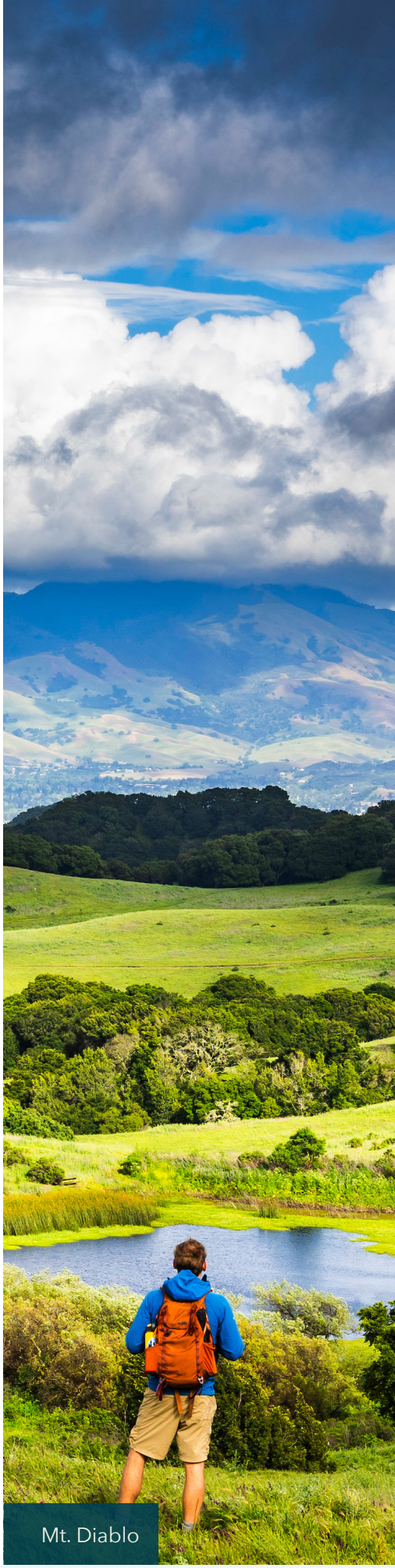
The assessment encompasses research of various aspects within a destination's landscape, including traditional hotel performance metrics, infrastructure and capacity building, environmental sustainability requirements and more. With the insights provided by the tourism readiness index, destinations can 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 that are 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.



Mt. Diablo

The San Francisco Bay Area results

The tourism readiness index reveals that the San Francisco Bay Area surpasses state averages in five out of eight pillars, showcasing strong performance. Notably, the San Francisco Bay Area stands out when compared to other regions in terms of scale, policy, leisure and business readiness. However, it falls slightly behind in urban readiness and environmental categories.

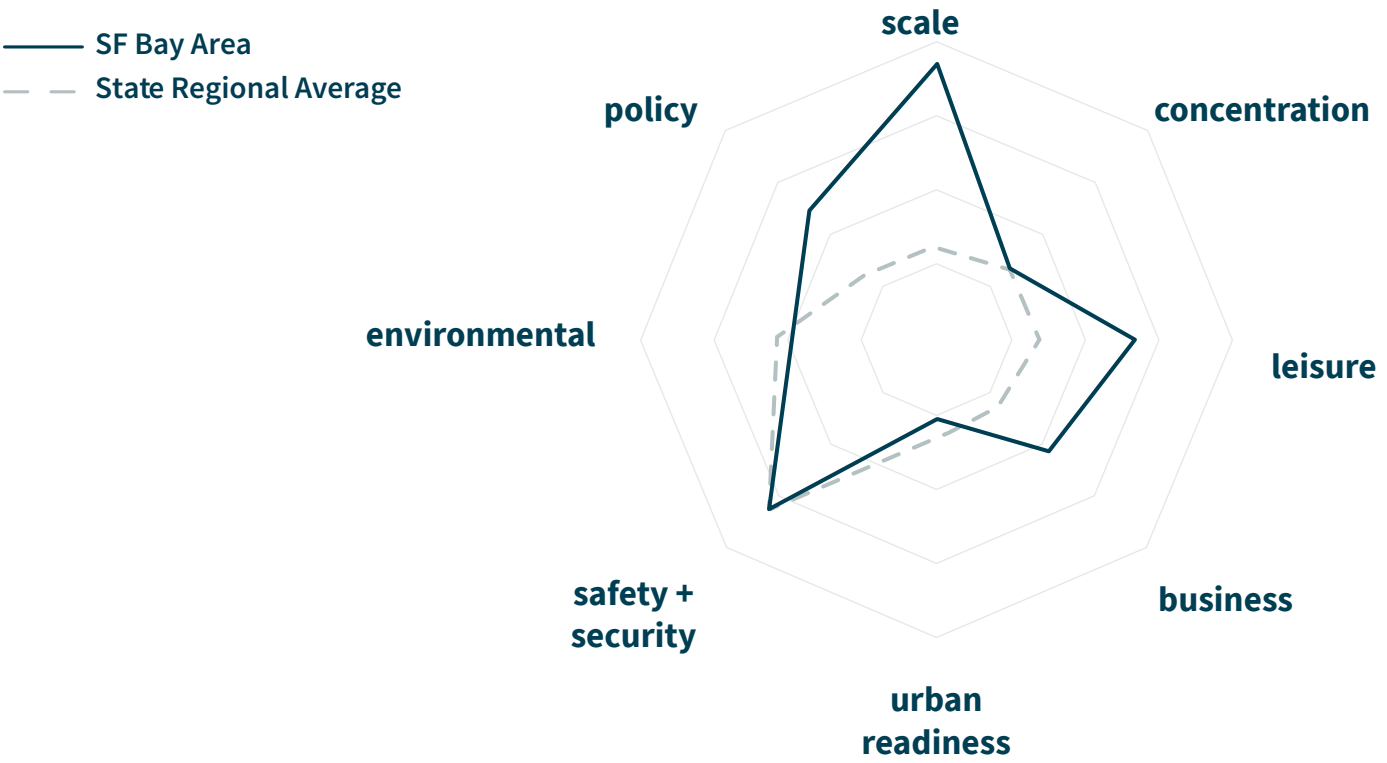
In-depth analysis of data from reputable global databases such as Centre for Aviation, CoStar, Oxford Economics, TripAdvisor and more shed light on the factors contributing to the San Francisco Bay Area's strong readiness performance. For instance, the analyzed data highlights the positive impact of factors like the high number of tourism-related retail businesses, meeting space inventory, strong business presence, diverse and high-quality attractions and favorable job availability and quality when compared to other regions.

Conversely, certain data points contribute to the underperformance in areas such as share of tourism as a percentage of the total GDP, population growth and risk of natural disaster. These insights provide opportunities for targeted improvements to enhance the San Francisco Bay Area's overall tourism readiness and maintain its competitive edge.

Based on the results, the San Francisco Bay Area is classified as a "mature performer." This typology represents an established region/destination with a strong track record. The classification highlights the San Francisco Bay Area's well-developed tourism infrastructure and its ability to attract a diverse range of visitors over time. Please refer to the **Appendix** for a more detailed overview of the tourism readiness index and all destination typologies.

As a mature performer, the San Francisco Bay Area should focus on visitor management by enhancing experiences, managing pressures and engaging in targeted capacity building. By continuously improving the overall visitor experience through investments in infrastructure, amenities, attractions and services, the San Francisco Bay Area can maintain its position as an established destination. Proactively addressing challenges such as overcrowding and traffic congestion will be crucial to ensure smooth visitor flow. Engaging in capacity building by enhancing workforce training, investing in technology and improving visitor behavior will help the San Francisco Bay Area handle increasing visitor numbers and evolving market preferences.

Outcome by pillar



Demand driver scorecard

Overview

The regional strategic planning process utilized 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 the **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 (0-20), interesting to do on a repeat visit (20-40), "must see" if in the area (40-60), regional attractors (60-80), national attractors (80-95) and global attractors (95-100). 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 detailed analysis and aids in regional research, discovery, planning and decision-making.

Sterling Vineyards

Muir Woods

Carneros Inn Resort, Napa Valley

The San Francisco Bay Area results

The San Francisco Bay Area demand driver scorecard process assessed over 180 attractions and experiences across the region, which were identified by regional advisory committee members, desktop research and by JLL during site visits. The scoring and analysis is intended to highlight the significant inventory and diversity of assets in the San Francisco Bay Area, surpassing other regions in the state with exceptional performance.

The results reveal that 55% of the scored assets are generating regional or national demand. Notably, 25 attractions and experiences are identified as national or worldwide demand drivers, including popular destinations such as the Golden Gate Bridge, Pier 39 and Fisherman's Wharf, Alcatraz Island, Oracle Park and Haight-Ashbury. Additionally, there are 75 assets and experiences categorized as regional demand drivers, with examples like San Mateo Japanese Garden, Castello di Amorosa, Oakland Zoo, The Greek Theater and San Francisco Ballet.

According to the analysis, 87% of assets scored in the region are considered family-friendly, with 56% of these assets driving global, regional and national demand. Notable examples of family-friendly attractions include Winchester Mystery House, cable cars and the Walt Disney Family Museum among others. The abundance of family-friendly attractions in the region highlights the importance of catering to the needs and preferences of family travelers.

Furthermore, approximately 40% of the assets scored are classified as outdoor recreation, of which about half are considered attractors for the region. The outdoor recreational areas encompass popular destinations, such as Battery Spencer, Armstrong Redwoods State Natural Reserve, Santa Cruz Beach Boardwalk and Muir Woods National Monument among others. Natural resources, such as beaches, parks and mountains, enhance the quality of life for residents and also play a vital role in attracting visitors and driving tourism.

Finally, 35% of all assets are related to culture, heritage and history, with 61% of the assets classified as attractors. These assets include Japan Town, USS Pampanito Museum and Memorial, Asian Art Museum, Sutro Baths and Ferry Building Marketplace among others.

Driven by the insights obtained from the demand driver scorecard, it is evident that cultural, heritage and historical assets play a vital role as key drivers of visitor demand in the San Francisco Bay Area. Recognizing the significance of these assets, the region can strategically leverage and showcase its rich cultural fabric to attract additional visitors. Focusing on targeted cultural tourism will not only attract visitors with a specific interest in culture but also appeal to a broader audience seeking unique and immersive travel experiences. This strategic approach can contribute to the overall growth and sustainability of the tourism industry in the San Francisco Bay Area and will further be explored as a priority in the opportunities section.

The demand driver scorecard analysis findings have supported the identification of key priorities and the formulation of strategies to continue positioning the San Francisco Bay Area for sustainable success.

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 which events generated the most impact and more specifically, what aspects of event planning could further enhance the event. Similar to 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 DMOs 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, addressing study results and engaging 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.

San Francisco

The San Francisco Bay Area results

The San Francisco Bay Area event matrix process inventoried and scored 65 events across the region that were collaboratively identified by the regional advisory committee, all of the San Francisco Bay Area DMOs, visits to the region, stakeholder surveys and validated as significant current and future room night generators during stakeholder discussions. The 65 events analyzed are a representative sample of all events in the region. Similar to its demand drivers, the San Francisco Bay Area hosts an array of annual events, with a diversity of events across the region and throughout the year.

The outcomes from this analysis identified 12 unique events that are positioned to drive national and regional demand to the San Francisco Bay Area region, including the Pride Parade, Outside Lands Music Festival, Chinese New Year Parade, Mavericks Big Wave International, the Pacifica Dog Surfing Competition and many others. The high-impact events drive extensive leisure tourism, reinforce the positive nature of the San Francisco Bay Area and enhance the destination's visibility. Hoteliers, retailers, creative economy representatives and other regional representatives reinforced the significant annual economic impacts of these events. The San Francisco Bay Area events also exhibit limited seasonality, meaning events attract visitors consistently throughout the year.

Several additional events, such as the Boots and Brews Country Festival, San Jose International Short Film Festival, Fog Fest, Livermore Craft Bear Festival and Obon Festival, were analyzed. While these events attract some visitors, overall scores indicate these events are primarily local in nature, contribute relatively less overnight visitation and economic impact as compared to other annual events in the region.

In the San Francisco Bay Area, fewer than half of the events are considered demand generators. Although the region has a wide variety of events year-round, there is potential for increasing the number of events that drive tourism from the globe, nation and region. 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 in conjunction with the event matrix, ensures a comprehensive and well-informed decision-making process when assessing the overall impact of current events in the region.

China Town, San Francisco

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 regional visitor and attendee experience is crucial for the success of the region.
- JLL's tourism readiness index classifies the San Francisco Bay Area as a "mature performer" destination with a well-developed tourism infrastructure and strong performance in categories like scale, leisure and business readiness.
- As a mature performer, the San Francisco Bay Area should prioritize visitor management by enhancing visitor experiences, proactively managing pressures and engaging in sustainable capacity building in order to keep up with an increasing visitor base.
- The demand driver scorecard results highlight the significant inventory and diversity of attractions and experiences in the San Francisco Bay Area with 55% of scored assets generating regional or national demand.
- The demand driver scorecard results determined that while culinary/agritourism/food experiences make up 20% of the analyzed assets, they drive 62% of the demand in the region. This indicates that there is potential to invest in increasing the number of culinary and agritourism experiences as the few that are available in the region drive a significant portion of demand.
- The event matrix analysis identified 12 unique events in the San Francisco Bay Area that are positioned to drive global, national and regional demand, attracting visitors consistently throughout the year.
- The event matrix analysis determined that about half of the 65 events studied are positioned to drive global, national and regional demand to the San Francisco Bay Area, with 33% of the demand generator events held in peak seasons. This indicates the potential to focus on off-season development of demand generator events.

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 San Francisco Bay Area.

Calistoga Inn

Sterling Vineyards

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 San Francisco Bay Area achieved a 6% growth in visitor spending, compared to 2022, reaching $31 billion. However, visitor spending has not reached the 2019 pre-pandemic high of $33.3 billion in visitor spending. Growth in direct travel spending on other travel did outperform pre pandemic highs at $6.7 billion — a 15% growth from 2022.

The economic contributions of travel in the San Francisco Bay Area were profound. Employment within the travel industry surged by 7.5% from 2022, providing 239,720 jobs. Direct travel-generated earnings increased by 13% to $14.7 billion, with key sectors such as accommodations, food services, visitor air and other travel 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 San Francisco Bay Area 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 San Francisco Bay Area include residents' appreciation for local amenities like hiking trails, beaches and vineyards, their views on tourism's role in providing business and job opportunities and the challenges posed by overcrowding, traffic, littering and an increase in prices. This study includes more detailed evaluations on how tourism affects the San Francisco Bay Area in more detail below.

The San Francisco Bay Area offers numerous appreciated features, such as restaurant options (90%), excellent climate (89%) and shopping districts (84%). Popular tourist attractions include hiking trails (68%), beaches (68%) and vineyards (64%). Tourism's dual impact is evident, with locals recognizing significant business opportunities, job creation and hotel support, alongside prevalent issues such as traffic (74%), crowding (69%) and litter (63%).

Residents reportedly see tourism as a net positive, enhancing local business and creating jobs. Over half of the residents agree that tourism's benefits outweigh its problems both locally (59%) and regionally (62%). Importantly, tourism is crucial for regional economic health, with 61% of locals deeming it vital for their community and 75% for their region. In addition, approximately 44% feel that their quality of life is improved by tourism, indicating room for strategic enhancements.

Strategically, the county might 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. Enhancing lesser-known local attractions could distribute visitor pressure more evenly, reducing stress on the most popular sites. A targeted campaign highlighting the symbiotic relationship between tourism and community well-being might also foster resident support and minimize resistance.

The San Francisco Bay Area regional opportunities

The San Francisco Bay Area 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 San Francisco Bay Area's unique attributes. The opportunities span across various crucial aspects of tourism development, including tourism product development, tourism-related infrastructure and sustainability and resiliency.

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 roadmap for stakeholders, DMOs and partners across the San Francisco Bay Area 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.

1 Invest in tourism product development

Cultural tourism

The connection between the arts sector and the tourism industry holds immense potential for tourism product development. Recognizing this, DMOs in the San Francisco Bay Area are starting to go beyond the promotion of cultural entities to developing strategic initiatives to foster meaningful alliances to strengthen cultural tourism.

The comprehensive assessment of over 180 assets in the San Francisco Bay Area revealed that about 35% of assets are related to arts, culture, heritage and history, from which over 60% drive regional, national and global demand. While the share of cultural assets from the total analyzed assets may be modest, their impact on attracting visitors to the region is significant.

With these factors in mind, fostering partnerships between tourism and art sectors becomes more important than ever for cultural tourism growth. Collaboration with key stakeholders such as arts councils, chambers of commerce and other organizations can significantly expand this sector. DMOs can promote sustainable development by integrating the area's rich cultural heritage with its technological advancements and position the San Francisco Bay Area as a global destination that celebrates its cultural richness and technological prowess.

Key partners

California Arts Council, Americans for the Arts, Californians for the Arts, SFMOMA, California Academy of Sciences, Exploratorium, Filoli Historic House & Garden, The Tech Interactive, San Francisco Arts Commission, Alameda County Arts Commission, Contra Costa County Arts and Culture Commission, Marin Cultural Association, Arts Council Napa Valley, San Mateo County Arts Commission, Santa Clara County Arts Commission, Creative Sonoma, San Francisco Heritage, Oakland Heritage Alliance, Preservation Action Council of San Jose

Strategies

- Develop comprehensive itineraries highlighting arts and cultural attractions and experiences throughout the Bay Area.
    - The **San Francisco Travel Strategic Business Plan** recognizes cultural tourism as a vital contributor to the city's tourism economy. It emphasizes the organization's dedication to fostering relationships with local cultural influencers, aiming to energize neighborhoods and attract more visitors to San Francisco's creative scene. This approach aligns with the strategy of developing comprehensive cultural itineraries for the Bay Area. Collaborations with artists, musicians and other cultural figures result in authentic experiences that showcase the city's diverse neighborhoods. These partnerships produce exclusive tours, temporary events and curated cultural experiences, woven into marketing efforts and visitor itineraries. The strategy enriches the tourist experience while distributing the economic benefits of tourism across a wider range of local communities and cultural institutions throughout San Francisco.
- Establish a "Bay Area Tech Trail" that links key technological landmarks, innovative companies and interactive museums across the Bay Area, positioning it as a premier destination for tech enthusiasts and encouraging visitors to explore the region's tech ecosystem and extend their stays.
- Collaborate with California Welcome Centers in San Francisco and Santa Rosa to provide information highlighting cultural tourism itineraries and routes in the San Francisco Bay Area, using informational displays and interactive exhibits that highlight unique experiences.
- Leverage the reach of California Welcome Centers to expand marketing efforts by placing promotional materials, sharing digital content and using their networks to attract a wide range of visitors to the Bay Area as a whole, ultimately increasing awareness and visitation.
    - The California Welcome Center in Santa Rosa offers resources on wine country experiences in both Sonoma and Napa counties, which are integral parts of the San Francisco Bay Area region. The center features interactive displays, local product showcases and personalized trip planning assistance. While wine tourism is a primary focus, the center also provides information on a wide range of regional attractions, including outdoor activities, cultural sites and seasonal events.

Events and festivals

In the realm of destination development, events and festivals emerge as a pivotal force, attracting overnight visitors, driving economic activity and showcasing the distinctiveness of a destination. The San Francisco Bay Area stakeholder survey findings identified events as the top opportunity for tourism advancements by more than half of the respondents.

In-depth **analysis in the regional research and discovery section** conducted on the potential impact of 65 events in the Bay Area demonstrated that nearly half of events are positioned to drive global, national and regional demand to the region. This highlights the significance of these events in attracting visitors from around the world and showcases the region's appeal as a cultural tourism destination. Furthermore, the analysis showed that June to August represents a key period for demand-generating events, making up approximately 33% of the total. Accordingly, expanding and diversifying events during the shoulder seasons becomes imperative in order to attract visitors throughout the year.

By taking on a proactive role, DMOs can steer the course of leisure event development, shape the calendar of offerings and create a robust and captivating event ecosystem. This involves strategic planning, collaboration and resource-sharing among stakeholders to tap into the diverse potential of events.

Key partners

State Arts Council, U.S. Cultural Heritage Arts Council, Californians for the Arts, Bay Area Host Committee

Strategies

- Implement JLL's **event matrix** to evaluate and enhance events in the San Francisco Bay Area. The event matrix assesses an event's current and future potential to drive measurable impact on the destination and will enable event organizers to understand the priorities of the tourism industry in the San Francisco Bay Area.
- Create a new regional flagship event for the San Francisco Bay Area, uniting diverse stakeholders to showcase the region's unique assets, attract larger audiences and foster cross-promotion and collaboration among municipalities and organizations.
    - South by Southwest (SXSW) in Austin, Texas, is a signature event with broad regional impacts. While centered in Austin, this event impacts the entire central Texas region. It combines music, film and interactive media festivals, drawing attendees from across the globe and involving multiple venues and communities in the area.
- Leverage California's mega events, such as FIFA World Cup and the Olympics, as a catalyst for development of sustainable transportation systems, environmental conservation projects and social impact programs that enhance the destination's livability and appeal for both residents and visitors beyond the events themselves.
    - Ventura County collaborated with CalTrain to expand bicycle accommodation during the X Games, which improved accessibility for attendees, demonstrated effective regional cooperation and established a model for integrating large-scale events with existing transit systems.
    - The **San Francisco Travel Strategic Business Plan** sets a goal of securing at least one additional significant sporting event annually, recognizing the potential of these events to attract visitors and generate substantial economic activity. Additionally, it emphasizes the importance of strengthening the existing partnership with the Bay Area Host Committee, particularly in preparation for upcoming mega events.

Outdoor recreation and hospitality

The San Francisco Bay Area region boasts a wealth of natural beauty and outdoor recreational opportunities, making it a prime destination for outdoor enthusiasts and nature lovers. In fact, according to the **demand driver scorecard** analysis conducted on over 180 assets in the region, a significant 40% of these assets were focused on outdoor recreation. More than half of these outdoor assets were identified as driving regional, national and even international demand to the area, showcasing the importance of outdoor recreation activities and assets for the Bay Area region.

The stakeholder survey indicated that newly developed outdoor experiences are among the top three tourism opportunities identified for the region. By capitalizing on this demand and strategically prioritizing outdoor hospitality and experiences, the San Francisco Bay Area can not only enhance its appeal to tourists but also stimulate economic growth and foster sustainable practices.

The following strategies aim to maximize the potential of outdoor recreation and hospitality in the region, ensuring a well-rounded and thriving destination for visitors and locals alike.

Key partners

California Outdoor Hospitality Association, Leave No Trace, Golden Gate National Recreation Area, Muir Woods National Monument, San Francisco Maritime National Historical Park, Point Reyes National Seashore, San Bruno Mountain State & County Park, Big Basin Redwoods State Park, Mount Tamalpais State Park, Castle Rock State Park, Filoli Historic House & Garden

Strategies:

- Utilize Visit California's **Tourism Exchange program** and its registration process for outdoor recreation providers to encourage participation on the platform.
- Develop a regional "Bay Area Outdoor Adventure Pass" that provides an itinerary for exploring diverse outdoor experiences across the region, from urban hikes in San Francisco to kayaking in the Berkeley Marina and hiking in the Santa Cruz Mountains.
- Emphasize **Leave No Trace** and **Cleaner California Coast** principles, which include guidelines on minimizing waste, respecting wildlife, staying on designated trails and leaving nature undisturbed.
    - **Visit Morgan Hill's Destination Strategic Plan** emphasizes this point by calling on strategically improving and maintaining outdoor spaces, including trails, parks and amenities, to reinforce the city's natural attractions.
- Organize regular cleanup events and engage volunteers to help maintain cleanliness in popular outdoor destinations.
    - **The 2023 Coastal Cleanup Day in Bodega Bay**, coordinated by Sonoma County Regional Parks and California Coastal Commission, saw a turnout of 150 volunteers and covered Doran Regional Park and Bodega Head. Participants, including local residents, students and members of environmental groups, collected approximately 500 pounds of trash and recyclables. Data collected during the cleanup contributed to the statewide Ocean Conservancy's database, helping track marine debris trends. The Bodega Marine Laboratory provided educational materials on marine conservation, emphasizing the impact of ocean pollution on local ecosystems. This event also raised awareness about ongoing marine conservation efforts in the area.
- Collect feedback from visitors, suppliers and local communities to understand the impacts and identify necessary adaptations.

Agritourism

Agritourism encompasses a diverse range of activities and experiences centered around agricultural environments. In agritourism, visitors engage with farming operations, participate in farm-related activities and learn about the various aspects of agricultural production. California holds a special position in this sector, producing a remarkable 70% of the nation's produce.

The **demand driver scorecard** analysis of over 180 assets found that only 19% of the assets fell within the food, culinary and agritourism category (this category excludes individual restaurants and only focuses on specific experiences and assets). However, an impressive 62% of those assets were identified as significant drivers of regional and national demand to the San Francisco Bay Area region. By capitalizing on the unique blend of agricultural heritage, diverse landscapes and culinary traditions, the San Francisco Bay Area has the potential to position itself as a leading agritourism destination. The following strategies outline actionable tactics to foster the growth of agritourism in the San Francisco Bay Area.

Key partners

California Department of Food and Agriculture, Agricultural Council of California, Bay Area Council, FARMstead, University of California Cooperative Extension

Strategies

- Conduct educational campaigns targeting both residents and visitors, highlighting the importance of supporting local products and promoting purchasing habits that prioritize local produce.
    - An example strategy is highlighted in the **Sonoma County Tourism Destination Stewardship and Resiliency Master Plan** which emphasizes the development of new or expanded cultural and agricultural heritage tourism experiences to increase non-peak visitation and spending.
- Organize familiarization trips to local farms, enabling tourism industry professionals to experience firsthand agricultural operations and establish connections with restaurants and suppliers.
    - The "**As Fresh As It Gets**" program in San Mateo is an initiative that promotes local food production, sustainability and community well-being and aims to connect consumers with local farmers and agricultural producers, providing access to fresh and locally grown food. Through farmer's markets, familiarization trips and educational events, the program highlights the importance of supporting local agriculture and the benefits of consuming fresh, seasonal produce.

Highlighted best practice

Sonoma County Farm Trails is a nonprofit organization that promotes and supports local agriculture and food production in Sonoma County, California. Founded in 1973, it serves as a vital link between farmers, food producers and consumers, offering a variety of programs and resources to showcase the region's rich agricultural heritage. The organization maintains a comprehensive map and guide of local farms, ranches and artisan food producers allowing visitors and residents to explore the diverse agricultural landscape of Sonoma County. Through events like farm tours, workshops and the annual Gravenstein Apple Fair, Farm Trails educates the public about sustainable farming practices, the importance of supporting local agriculture and the farm-to-table movement.

- Incorporate QR codes in menus and link diners to information about the origin of the food and the farm or ranch it came from.
- Highlight the benefits of local sourcing, sustainable practices, freshness and quality of the food to attract diners who value these aspects.

2 Improve tourism-related transportation infrastructure

The transportation landscape in the San Francisco Bay Area region plays a critical role in showcasing the diverse offerings of assets and attractions to visitors. Tourism stakeholders have identified public transportation, signage and wayfinding as areas requiring significant improvement. More than half of these stakeholders have identified an enhancement in public transportation services as the top improvement needed to positively impact the San Francisco Bay Area tourism experience.

One of the central challenges visitors face is the significant fragmentation in the transportation system. With a staggering 27 transportation agencies operating across nine counties, the abundance of options often leaves visitors confused and struggling to navigate the region effectively. This challenge is particularly evident for international visitors trying to traverse between major airports and destinations in the northern part of the San Francisco Bay Area.

Another pressing issue is the limited last-mile connectivity, especially in areas further from San Francisco, such as the Sonoma County coast and Morgan Hill. The absence of efficient transportation options to bridge the gap between public transportation hubs and local destinations poses a significant obstacle for visitors seeking to explore these areas without a personal vehicle.

In light of these challenges, it is imperative to address the limitations within the transportation system to enhance the visitor experience and unlock the full potential of the San Francisco Bay Area region as a premier tourism destination. The following strategies encompass areas to address the challenges and capitalize on the opportunities identified in the qualitative and quantitative sections of this project.

Key partners

Bay Area Rapid Transit, San Francisco International Airport, San José Mineta International Airport, Oakland International Airport, Metropolitan Transportation Commission, AC Transit, Caltrain, San Francisco Municipal Transportation Agency, Sonoma County Transit, Marin Transit, Solano County Transit, Napa Valley Transportation Authority, San Mateo County Transit District, Santa Rosa CityBus, Petaluma Transit, Capitol Corridor Joint Powers Authority, Livermore Amador Valley Transit Authority, Dumbarton Express, Emery Go Round, Golden Gate Transit, Healdsburg Transit, RidePal, San Benito County Transit, San Leandro LINKS, Santa Cruz Metro, Stanford Marguerite Shuttle, Uber, Lyft, Alto

Strategies

- Explore opportunities for joint initiatives and promotional activities to encourage visitors to utilize public transportation, such as incorporating destination information, tourism messaging and promotions in transportation systems (e.g., advertisements, visitor guides and digital displays) both within stations and on vehicles.
- Increase the presence of trained ambassadors or personnel who can address safety concerns, provide helpful information to visitors and ensure a safe and welcoming transit environment, especially surrounding mega events.
    - SF Travel has continuously implemented its **Welcome Ambassador Program** throughout their strategic plans and initiatives. This program serves as an essential component in addressing safety concerns and providing helpful information to visitors, particularly during mega events. The ambassadors, strategically positioned in key tourist areas and transit hubs, offer a welcoming and informative presence that enhances visitors' sense of safety and improves their overall experience.
- Establish a data-sharing framework between the San Francisco Bay Area DMOs and transportation agencies, centralizing visitor and tourism data to optimize transit services, informing routing, scheduling and special services and improving overall visitor experience, especially in the light of upcoming mega events.
- Highlight the benefits of adopting a unified fare payment system, including ease of use, convenience, seamless transfers and cost savings.
- Encourage event organizers and conference planners to integrate transportation information into event itineraries, websites and promotional materials to encourages public transportation usage.
    - **The Tri-Valley Destination Strategic Plan** outlines a strategic approach to event transportation that aligns well with encouraging public transportation usage. The plan recommends that Visit Tri-Valley collaborate with event organizers and private transportation partners to establish dedicated transportation services for major events identified through an event matrix. This initiative aims to reduce congestion and parking issues while enhancing accessibility for both locals and visitors.
- Consider mobility options, such as microtransit programs or shared-ride services and shuttles, as solutions to first/last mile challenges and to enhance accessibility and ease of travel for tourists and local commuters.
    - The **Palo Alto Link** program aims to reduce traffic congestion and promote accessibility to local businesses and amenities by offering cost-efficient, convenient and sustainable rides through electric shuttles and other ecofriendly vehicles to and from downtown Palo Alto.

Fisherman's Wharf

3 Support workforce development

The stakeholder survey revealed that 42% of stakeholders identified labor availability as a significant issue within the tourism industry. Additionally, about 70% of respondents reported experiencing challenges related to employment. Among the top challenges highlighted by stakeholders were the high cost of living and the lack of affordable housing options.

Engagements with numerous nonprofit organizations, government entities and industry representatives revealed a shared desire to include hospitality and tourism as a viable career path with significant potential. Prioritizing workforce training in the tourism industry and enhancing the perception of tourism jobs as high-value career opportunities will benefit the industry by ensuring a highly skilled workforce and increase the reputation of tourism jobs as desirable career paths.

Highlighted best practice

An excellent example of workforce training and procurement is **Sonoma County Tourism's Accredited Hospitality Professional program**. This initiative not only enhances the skillset of the existing hospitality workforce through educational programming but also inspires and trains local high school students for future careers in hospitality, encouraging and preparing young professionals to enter the local tourism industry.

Key partners

Labor and Workforce Development Agency, Governor's Office of Business and Economic Development, Tourism Diversity Matters, JobTrain, San Francisco Office of Economic and Workforce Development, All Home, Stanford University, University of California, Berkeley, San Francisco State University, University of San Francisco, San José State University, Holy Names University, Notre Dame de Namur University, Menlo College, Sonoma State University, California State University, East Bay, Skyline College, City College of San Francisco, Diablo Valley College, Las Positas College, De Anza College, Foothill College, Cañada College, College of San Mateo, Mission College, Ohlone College and Contra Costa College, California Travel Association, Placemate

Strategies

- Increase available workforce by leveraging existing apprenticeship programs, such as the American Hotel and Lodging Association Foundation **Apprenticeship Program** and the Tourism Diversity Matters **Apprenticeship Program** in one or more of the three distinct career tracks: a destination track, a sports track and a meetings and events track.
- Implement internship and co-op programs in the San Francisco Bay Area's universities and colleges that provide practical, hands-on experience to students pursuing degrees in tourism-related fields, enabling them to gain valuable industry exposure.

4 Enhance regional marketing and messaging

Perceptions of San Francisco and the city's narrative significantly influence both the city and the entire region. To enhance this narrative, the objective is to proactively highlight the destination's positive aspects while addressing any challenges directly.

This section aims to provide opportunities for showcasing the San Francisco Bay Area as an environmentally progressive, diverse and vibrant region that offers unique experiences, fosters community development and aligns with broader sustainability initiatives.

Key partners

Reimagining San Francisco, Destination Tiburon, Marin Convention & Visitors Bureau, San Francisco Travel Association, Sonoma County Tourism, Sonoma Valley Visitors Bureau, Stay Pleasant Hill, The San Francisco Peninsula, Visit Benicia, Visit Berkeley, Visit Concord, Visit Morgan Hill, Visit Napa Valley, Visit Oakland, Visit San Jose, Visit Santa Rosa, Visit Tri-Valley

Strategies

- Develop regional marketing campaigns that promote sustainability and environmental awareness, showcasing initiatives such as green buildings, renewable energy programs and sustainable transportation options. Highlighting the unique assets and experiences offered by different neighborhoods within the region can also help counter negative perceptions and showcase diversity and cultural richness.
    - **SF Travel's "It All Starts Here" campaign** showcases the connection between San Francisco's big businesses and cultural heritage. The campaign aims to counter brand tarnish by highlighting the city's entrepreneurial spirit.
- Position San Francisco as a gateway city to the region by encouraging visitors to explore the broader region, including destinations like Marin, Sonoma and Napa counties.
- Build upon Visit California's efforts to collaborate with travel journalists and influencers to showcase the unique experiences, culinary offerings and natural beauty of both San Francisco and the surrounding areas.

Timber Cove Resort

Conclusion

The development of the San Francisco Bay Area regional opportunities marks a significant milestone in the effort to enhance and sustain the region's tourism industry. Through extensive stakeholder engagement, comprehensive research and strategic analysis, this plan identifies opportunities that can guide the San Francisco Bay Area toward a more vibrant, sustainable and economically prosperous future.

The process of creating this plan has been marked by dedication, innovation and a shared vision among diverse stakeholders. From DMOs and economic development agencies to arts and cultural organizations, transportation entities and technology companies, the input and expertise of numerous partners have shaped a plan that is both ambitious and achievable.

The key opportunities identified — investing in tourism product development, improving tourism-related transportation infrastructure, supporting workforce development and enhancing regional marketing and messaging — are supported by actionable strategies. These opportunities represent more than just a plan; they embody a road map for the sustainable future of the San Francisco Bay Area's tourism industry.

The road ahead may present challenges, but it also offers tremendous opportunities for growth innovation and positive change for the San Francisco Bay Area to exceed expectations and stand as a model for sustainable tourism development.

The project team extends their sincere 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 San Francisco Bay Area 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 San Francisco Bay Area. Without their unwavering support and commitment, this plan would not have been possible. Thank you all for your contributions.

Name	Organization
Aphrodite Caserta	Safari West
Natalie Alvanez-Taylor	The Tech Interactive
Scott Gentner	Pier 39
Susan O'Sullivan	Filoli Historic House & Garden
Stephen Revetria	Giants Enterprises
Christine Lawson	Discover Santa Clara
Barbara Hillman	Visit Berkeley
Jeffrey Church	Visit Berkeley
Cassandra Costello	San Francisco Travel Association
Claudia Vecchio	Sonoma County Tourism
Krista Rupp	Visit Morgan Hill
John LaFortune	Team San Jose
Linsey Gallagher	Visit Napa Valley
Mark Essman	Visit Marin
Peter Gamez	Visit Oakland
Terence Concannon	Visit Santa Cruz County
Tracy Farhad	Visit Tri-Valley
Jay Banfield	All Home
Jeff Bellisario	Bay Area Council
Mark Orcutt	East Bay Leadership Council
Rob Moreau	Governor’s Office of Business and Economic Development
Tim Sbranti	Innovation Tri-Valley Leadership Group
Toni Gomez	Governor’s Office of Business and Economic Development
Jon Kimball	Marriot International
Melinda Pahl	The Inn at The Tides
Laurie Thomas	Golden Gate Restaurant Association
Mariann Costello	Scoma's Restaurant
Tom Davies	Visit Napa Valley Board of Directors Chair, Governor’s Office of Business and Economic Development, Managing Partner of V. Sattui Winery
Allison Jordan	California Sustainable Winegrowing Alliance/ Wine Institute
Marc Landgraf	Santa Clara Valley Open Space Authority
Kevin Bumen	San Francisco International Airport

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
Destination Tiburon
Visit Marin
San Francisco Travel
Sonoma County Tourism
Sonoma Valley Visitors Bureau
Stay Pleasant HIll
The San Francisco Peninsula
Visit Benicia
Visit Berkeley
Visit Concord
Visit Morgan Hill
Visit Napa Valley
Visit Oakland
Visit San Jose
Visit Santa Cruz County
Visit Santa Rosa
Visit Tri-Valley

Armstrong Redwoods State Natural Reserve, Guerneville

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
Alameda	Alameda General Plan 2040
Albany	Albany 2035 General Plan
American Canyon	The City of American Canyon General Plan
Antioch	City of Antioch General Plan
Atherton	Town of Atherton General Plan
Belmont	Belmont 2035 General Plan
Belvedere	City of Belvedere General Plan 2030
Benicia	Benicia General Plan
Benicia	City of Benicia Strategic Tourism Marketing Plan
Berkeley	City of Berkeley General Plan
Brentwood	City of Brentwood General Plan
Brisbane	The Brisbane General Plan
Burlingame	Burlingame General Plan
Calistoga	City of Calistoga General Plan
Capitola	Capitola General Plan
Clayton	Clayton 2000 General Plan
Cloverdale	City of Cloverdale General Plan
Colma	Town of Colma General Plan 2040
Concord	CONCORD 2030 GENERAL PLAN
Concord	Visit Concord Tourism Strategy
Corte Madera	Town of Corte Madera General Plan
Cotati	Cotati General Plan
Cupertino	Community Vision 2040
Daly City	Daly City 2030 General Plan
Danville	The Town of Danville 2030 General Plan
Dublin	City of Dublin General Plan
East Palo Alto	City of East Palo Alto: General Plan 2035
El Cerrito	El Cerrito General Plan
Emeryville	Emeryville General Plan
Fairfax	Town of Fairfax 2010-2030 General Plan
Foster City	Foster City General Plan

Destination plans review database (cont.)

City/County	Name of plan
Fremont	City of Fremont General Plan 2030
Half Moon Bay	City of Half Moon Bay General Plan
Hayward	Hayward 2040 General Plan
Healdsburg	Healdsburg 2030 General Plan
Hercules	Hercules General Plan
Hillsborough	2005 Hillsborough General Plan
Lafayette	Lafayette General Plan
Larkspur	Larkspur General Plan 2040
Livermore	City of Livermore General Plan 2003-2025
Los Altos	City of Los Altos General Plan
Los Altos Hills	City of Los Altos General Plan
Los Gatos	Los Gatos 2040 General Plan
Martinez	City of Martinez General Plan 2035
Menlo Park	City of Menlo Park General Plan
Mill Valley	MV2040 General Plan
Millbrae	City of Millbrae 2040 General Plan
Milpitas	City of Milpitas General Plan 2040
Monte Sereno	City of Monte Sereno Green Stormwater Infrastructure Plan
Moraga	Moraga 2002 General Plan
Morgan Hill	Visit Morgan Hill Destination Strategic Plan
Morgan Hill	City of Morgan Hill 2035 General Plan
Mountain View	Mountain View 2030 General Plan
Napa	City of Napa 2040 General Plan
Newark	Newark California General Plan
Novato	City of Novato General Plan 2035
Oakland	City of Oakland General Plan
Oakley	City of Oakley 2020 General Plan
Orinda	City of Orinda General Plan
Pacifica	City of Pacifica General Plan 2040
Palo Alto	City of Palo Alto Comprehensive Plan 2030
Petaluma	Petaluma General Plan 2025

Destination plans review database (cont.)

City/County	Name of plan
Piedmont	The Piedmont General Plan
Pinole	General Plan Update
Pittsburg	2020 General Plan
Pleasant Hill	City of Pleasant Hill General Plan 2003
Pleasant Hill	Stay Pleasant Hill Strategic Business Plan
Pleasanton	Pleasanton General Plan 2005-2025
Portola Valley	Town of Portola Valley General Plan
Redwood City	Redwood City General Plan
Richmond	Richmond General Plan 2030
Rohnert Park	Our Place, Rohnert Park 2020, A Plan for the Future
Ross	2007-2025 Town of Ross General Plan
San Anselmo	Town of Anselmo General Plan
San Bruno	San Bruno General Plan
San Carlos	San Carlos 2030 General Plan
San Francisco	San Francisco General Plan
San Francisco	San Francisco Travel Strategic Business Plan
San Jose	Envision San José 2040 General Plan
San Jose	Team San Jose Strategic Plan
San Leandro	San Leandro 2035 General Plan
San Mateo	Strive San Mateo General Plan 2040
San Pablo	San Pablo General Plan 2030
San Rafael	San Rafael General Plan 2040
San Ramon	San Ramon General Plan 2035
Santa Clara	City Of Santa Clara 2010 - 2035 General Plan
Santa Cruz	Santa Cruz County General Plan
Santa Rosa	SANTA ROSA GENERAL PLAN 2035
Santa Rosa	Santa Rosa Metro Chamber Strategic Plan
Saratoga	City of Saratoga General Plan 2040
Sausalito	City of Sausalito General Plan
Scotts Valley	City of Scotts Valley General Plan
Sebastopol	Sebastopol General Plan

Destination plans review database (cont.)

City/County	Name of plan
Sonoma	Destination Stewardship and Resiliency Master Plan
Sonoma	General Plan 2020
Sonoma	Sonoma County Strategic Plan
South San Francisco	2040 General Plan
St. Helena	St Helena General Plan Update 2040
Sunnyvale	City of Sunnyvale General Plan
Tiburon	Tiburon General Plan 2040
Tri-Valley	Visit Tri-Valley Destination Strategic Plan
Union City	2040 Union City General Plan Update
Vallejo	Propel Vallejo General Plan 2040
Walnut Creek	City of Walnut Creek General Plan 2025
Watsonville	General Plan 2050
Windsor	Town of Windsor 2040 General Plan
Woodside	The Town of Woodside General Plan 2012
Yountville	Yountville 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
Alex Stettinski	San Jose Downtown Association
Alexa Jeffress	City of Pleasanton
Alexandra Endress	City of Berkeley
Allison Jordan	California Sustainable Winegrowing Alliance, Wine Institute
Amy Cleary	Golden Gate Restaurant Association
Annie Morhauser	Annieglass
Anna Marie Presutti	Hotel Nikko San Francisco San Francisco Travel
Anne Richman	Transportation Authority of Marin
Barbara Leslie	Oakland Metropolitan Chamber of Commerce, Port of Oakland
Bert Whitaker	Sonoma County Regional Parks
Bhavana Patel	Capitola Hotel, Ocean Echo Inn
Blage Zelalich	City of San Jose, Economic Development
Bonnie Lipscomb	City of Santa Cruz, Department of Economic Development & Housing
Brandon Cardwell	City of Livermore, Innovation and Economic Development
Brandy Jones	Claremont Club & Spa
Brendan Rawson	San Jose Jazz
Brian Malicdem	City of Morgan Hill
Briana Evans	City of Redwood City
Brittney Sherman	Morgan Hill Chamber of Commerce
Carrie Barnes	San Francisco Democratic Party
Catherine Hendricks	Hilton
Chris Carter	Livermore Valley Arts
Chris Chamberlain	Marin County Parks
Chris Ghione	City of Morgan Hill
Chris Wright	Advance SF
Christine Kupczak	Hillsdale Shopping Center
Cindy Reinhart	Marin Suites Hotel
Clif Clark	Marriott International, San Francisco Area
Collette Schow	City of Benicia
Connie Martinez	SVCreates
Darren Pound	Dream Inn Santa Cruz
David Dindak	City of Morgan Hill
David Dworkin	National Housing Conference
Derek Timm	City of Scotts Valley
Dyana Kelley	California Outdoor Hospitality Association
Ed Costa	Carneros Resort & Spa

Focus Group Attendees (cont.)

Name	Organization
Alesandra Lozano	City and County of San Francisco
Edward Roe	The Fairmont Sonoma Mission Inn & Spa, Claremont Club & Spa
Emma Swain	St. Supéry Vineyards & Winery
Ernie Schmidt	The Fox Theatre
Fred Keeley	County of Santa Cruz
Hazel Wetherford	City of Dublin
Heath McCue	CIM Group, Oakland Waterfront
Hope Fuerniss	Embassy Suites by Hilton San Rafael Marin County
Jason Su	Guadalupe River Walk Conservancy
Jennifer Chen	City of San Mateo
Jennifer Nettles	CIM Group, Jack London Square
Jenny Toomer	River Terrace Inn
Jessica Chilingerian	Union Square Alliance
Jessica Epstein	San Mateo County Transit District
Jill Basch	Point Reyes Farmstead Cheese Company
Jim Brown	Arts Council Santa Cruz County
Joe Bartolomei	Sonoma County Farmhouse Inn
John Ford	Commute.Org
Julie Barlow	SWCA
Julie Morris	UC Agriculture and Natural Resources Cooperative Extension Santa Clara County
Justin Meek	City of Watsonville
Kara Newport	Filoli Historic House & Garden
Ken Bukowski	City and County of San Francisco
Kerry Birnbach	City and County of San Francisco
Kevin Kretsch	Hyatt Regency San Francisco Airport
Kimberlee Weaver	Jettywave Distillery
Kristen Zaremba	City of Oakland Cultural Affairs Division
Laurie Thomas	Golden Gate Restaurant Association
Len Materman	OneShoreline
Lena Eyen	Open Space Authority
Linda Cover	Coastal Watershed Council
Liz Birnbaum	Choose Santa Cruz
Mariann Costello	Scoma's Restaurant
Marie McCusker	Petaluma Downtown Association
Mark Chhabria	County of Marin
Mark Orcutt	East Bay Leadership Council

Focus Group Attendees (cont.)

Name	Organization
Matt Mahood	City of Morgan Hill
Meghan Wallace	Port of San Francisco
Melinda Pahl	The Inn at The Tides
Michael Baier	Hyatt Regency San Francisco Downtown SoMa
Michael Mallie	Jack's Prime Burgers & Shakes
Michael O'Neill	County of San Mateo
Michael Vaccaro	Courtyard by Marriott Novato
Mike Kahn	Explore Local Nature, Hilltromper
Molly Blaisdell	Hook, Line & Thinker
Molly Rattigan	City of Napa
Nanci Klein	City of San Jose
Naomi Kelly	NK Strategies
Pete Sandhu	Five Rivers Aviation
Pete Sittnick	Waterbar and Epic Steak
Peter Detlefs	County of Santa Cruz
Richard Peterson	U.S. Cultural Heritage Marketing Council
Rikin Lakhani	The Elliot Group
Rochelle Wheeler	City of Alameda
Rodd Lee	Bay Area Rapid Transit
Rosanne Foust	San Mateo County Economic Development Association
Savlan Hauser	Jack London Square
Scott Gentner	Pier 39
Scott Wintner	San Jose Mineta International Airport
Sonja Brunner	City of Santa Cruz
Susan O'Sullivan	Filoli Historic House & Garden
Tara Schiff	City of Pacifica
Tejal Sood	Bayside Hotel Group
Thomas Bensel	The Culinary Institute Of America At Greystone & Copia
Tim Sbranti	Innovation Tri Valley
Tom Davies	V. Sattui Winery
Tyrone Jue	San Francisco Environment Department

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
Adora Manalo	Four Seasons Silicon Valley
Adrian Covert	Bay Area Council
Alex Bastian	Hotel Council of San Francisco
Alexandra Endress	City of Berkeley
Alicia John-Baptiste	San Francisco Bay Area Planning and Urban Research Association
Allison Jordan	California Sustainable Winegrowing Alliance, Wine Institute
Allyson Taylor	Balletto Vineyards
Álvaro Casanova	California Academy of Sciences
Amy Cleary	Golden Gate Restaurant Association
Andrew Abou Joude	San Francisco International Airport
Andrew Jones	Oakland Venue Management
Anna Marie Presutti	San Francisco Travel Association, Hotel Nikko San Francisco
Annie Burke	TOGETHER Bay Area
Barbara Hillman	Visit Berkeley
Barbara Leslie	Oakland Chamber of Commerce
Bert Whitaker	Sonoma County Regional Parks
Beth Javens	Visit Concord
Bhavana Patel	Capitola Hotel, Ocean Echo Inn
Bob Linscheid	Walnut Creek Chamber of Commerce & Visitors Bureau
Bonnie Lipscomb	City of Santa Cruz Department of Economic Development & Housing
Bonny Hawley	Friends of Santa Cruz State Parks
Brendan Rawson	San Jose Jazz
Cameron Newton	San Francisco Peninsula
Cassandra Costello	San Francisco Travel Association
Catherine Hendricks	Hilton San Jose
Chris Hirano	Filoli Historic House & Gardens
Chris Wright and Wade Rose	Advance SF
Christina Glynn	Visit Santa Cruz
Christine Lawson	Discover Santa Clara
Claudia Vecchio	Sonoma County Tourism
Clif Clark	Marriott International, San Francisco Area
Collette Schow	City of Benicia
Dan Brown	Visit Santa Rosa
Dan Herbst	Enterprise Mobility
Darren Pound	Dream Inn Santa Cruz
Davey Barrett	Filoli Historic House & Gardents

Stakeholder interviewees (cont.)

Name	Organization
David Haubert	Alameda County Board of Supervisors, District 1
David Hsu	Four Seasons Silicon Valley
David Martindale	Bay Area Rapid Transit (BART)
Deepika Sarma	Four Seasons Silicon Valley
Del Seymour and Shavonne	Tenderloin Walking Tour, Code Tenderloin
Denise Harris	Visit Santa Cruz County
Diana Orozco	All Home
Dyana Kelley	CA Outdoor Hospitality Association
Ed Costa	Carneros Resort & Spa
Elaine Cortez Schroth	Visit Concord
Elaine Forbes	Port of San Francisco
Emily Beach	JobTrain
Fettah Aydin	The Embassy Suite San Francisco Airport, Hilton, Atrium Hospitality
Frank Leal	MOHI Farm and Leal Hospitality Group
F.X. Crowley	FX Crowley Company
Gary Bauer	Bauer's Intelligent Transportation
Gina Marr	Visit Marin
Greg Moore	United Airlines, SF Travel Board
Hubertus Funke	SF Travel
Hugh Futrell	Hotel-E, Hugh Futrell Corporation
Jason Su	Guadalupe River Walk Conservancy
Jax Pulliati	San Francisco Environment Department
Jay Banfield	All Home
Jeff Bellisario	Bay Area Council
Jennifer Nettles	CIM Group, Oakland Waterfront
Jeremy Sampson	The Travel Foundation
Jill Buschini	Bay Area Rapid Transit (BART)
Jim Morris	Balletto Vineyards
Joe Bartolomei	Farmhouse Inn
John Albrecht	Port of Oakland, Aviation
John Hutar	The San Francisco Peninsula
John Lafortune	Team San Jose
Jon Kimball	Marriott International, San Francisco Area
Jon Welte	Hiller Aviation Museum
Josephine Fleming	California Green Business Network
Julie Tilley Barlow	SWCA
Karissa Kruse	Sonoma County Winegrowers
Karla Najera	The San Francisco Peninsula

Stakeholder interviewees (cont.)

Name	Organization
Ken Rich	Union Square Alliance
Kerry Adams Hapner	City of San José, Economic Development & Cultural Affairs
Kevin Kretsch	Hyatt Regency San Francisco Airport
Kevin Kumataka	San Francisco Environment Department
Kevin Wisney	Filoli Historic House & Garden
Kimberlee Weaver	Jettywave Distillery
Krishna Farol-Schenck	Filoli Historic House & Garden
Krista Rupp	Visit Morgan Hill
Laura Maldonado	All Home
Laurie Thomas	Golden Gate Restaurant Association
Leah Van der Mei	California Academy of Sciences
Lena Eyen	Open Space Authority
Linsey Gallagher	Visit Napa Valley
Lisa Kerschner	San Francisco Airport Marriott Waterfront
Lizbeth Luna Angeles	Four Seasons Silicon Valley
Marc Landgraf	Open Space Authority
Marie McCusker	Petaluma Downtown Association
Marissa Rodriguez	Union Square Alliance
Mark Chhabria	California Green Business Network, County of Marin
Mark Essman	Visit Marin
Mark Nagel	RescueSF
Mark Orcutt	East Bay Leadership Council
Marni Cook	San Francisco Symphony
Mary Ellen Carroll	Department of Emergency Management, San Francisco
Masood Samiee	San Francisco Council of District Merchants Associations
Matt Mahood	City of Morgan Hill Economic Development
Melanie Samay	San Jose Museum of Art
Melina Pahl	The Inn at the Tides
Mia Monroe	Golden Gate National Recreation Area, Muir Woods
Michelle Heston	Fairmont Hotels & Resorts
Mike Kahn	Hilltromper, Explore Local Nature
Mishelle Westendorf	Jettywave Distillery
Mitch Postel	San Mateo County Historical Association
Moira McEnespy	California State Coastal Conservancy
Naomi Kelly	NK Strategies
Natalie Taylor	The Tech Interactive
Omid Aminifard	Santa Cruz Beach Boardwalk
Patricia Snowden	Stay Pleasant HIll

Stakeholder interviewees (cont.)

Name	Organization
Peter Gamez	Visit Oakland
Peter Rumble	Santa Rosa Metro Chamber, Napa County Farm Bureau
Peter Detlefs	County of Santa Cruz
Rachel Young	Filoli Historic House & Garden
Rebecca Johnson	California Academy of Sciences
Rebecca Saltzman	Bay Area Rapid Transit (BART), City of Cerrito Council
Richard Berman	Port of San Francisco
Rob Moreau	Go-BIZ
Rodd Lee	Bay Area Rapid Transit
Rodney Fong	SF Chamber of Commerce
Rosanne Foust	San Mateo County Economic Development Association (SAMCEDA)
Samantha Delucchi	California Academy of Sciences
Sarah Dennis Phillips	San Francisco Office of Economic and Workforce Development
Savlan Hauser	Jack London Improvement District
Susan Sayer Batton	San Jose Museum of Art
Scott Gentner	Pier 39
Scott Wintner	San José Mineta International Airport
Stephanie Fermin	Destination Tiburon
Stephen Baiter	The East Bay Economic Development Alliance
Stephen Revetria	Giants Enterprises
Steve Monahan	Monahan Pacific Corporation
Steve Snider	Oakland Venue Management
Susan O'Sullivan	Filoli Historic House & Gardern
Suzanne Dedeaux	JobTrain
Tara Schiff	City of Pacifica
Terence Concannon	Visit Santa Cruz County
Tim Sbranti	Innovation Tri Valley
Tim Zahner	Sonoma Valley Visitors Bureau
Todd David	Housing Action Coalition, Abundant SF
Tom Davies	V. Sattui Winery
Tomiquia Moss	All Home & Business, Consumer Services and Housing Agency
Toni Gomez	Governor’s Office of Business and Economic Development
Tori Decker	Uptown Downtown Oakland Community Benefits District
Tracy Farhad	Visit Tri-Valley
Tyrone Jue	San Francisco Environment Department
Vanessa Garcia	7 Mile House
Yulia Carter	City of Pacifica
Zaileen Janmohamed	Bay Area Host Committee

Visited points of interest

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

Point of interest	Location
Visit Berkeley	Berkeley
7 Mile House	Brisbane
Hiller Aviation Museum	Burlingame
Downtown Carmel	Carmel
Carmel River State Beach	Carmel
Scenic Road Walkway	Carmel
Ocean Avenue	Carmel
Foray	Carmel
Le Petit Pali at 8th Ave	Carmel
Concord Visitor Center	Concord
Downtown Concord	Concord
Gilroy Gardens	Gilroy
Chitactac-Adams Indigenous Site	Gilroy
Terra Amico Farms	Gilroy
The Neon Exchange	Gilroy
Gilroy Downtown	Gilroy
Garlic City Café	Gilroy
California Welcome Center Gilroy	Gilroy
Downtown Half Moon Bay	Half Moon Bay
Andreotti Family Farms Pumpkin Patch	Half Moon Bay
Sea Horse Ranch	Half Moon Bay
Sam's Chowder House	Half Moon Bay
Surfer's Beach	Half Moon Bay
Mavericks and Mavericks Surf Company	Half Moon Bay
Half Moon Bay Brewing Company	Half Moon Bay
Barbara's Fishtrap	Half Moon Bay
Jettywave	Half Moon Bay
Crystal Springs Reservoir	Highlands
Visit Marin	Marin
Pacific Grove	Monterey
17-Mile Drive	Monterey
MOHI Farm	Morgan Hill
Downtown Morgan Hill	Morgan Hill
Morgan Hill Outdoor Sports Center	Morgan Hill
Andy's Orchard	Morgan Hill
Máyyan 'Ooyákma Coyote Ridge Open Space Preserve	Morgan Hill

Point of interest	Location
Point Monera Lighthouse	Moss Beach
Shoreline Amphitheater	Mountain View
The Bay Trail	Mountain View
Napa Visitor Center	Napa
Highway 29	Napa
Napa Valley Wine Train	Napa
Welcome to Napa Valley Sign	Napa
V. Sattui Winery	Napa
Silverado Trail	Napa
Carneros Resort & Spa	Napa
Uptown/Downtown Oakland Organization	Oakland
Jack London Square and Waterfront	Oakland
Visit Oakland	Oakland
Fitzgerald Marine Reserve	Pacifica
Devil's Slide	Pacifica
Norcal Surf shop	Pacifica
Sanchez Adobe	Pacifica
Ohlone-Portolá Heritage Trail	Pacifica
Pacifica State Beach	Pacifica
World Famous Taco Bell	Pacifica
Point Lobos Site Tour	Point Lobos
San Mateo County History Museum	Redwood City
Courthouse Square	Redwood City
Salnias Drive Through	Salinas
Laguna Seca Raceway	Salinas
SF Travel	San Francisco
Holbrook House	San Francisco
Union Square San Francisco	San Francisco
Tenderloin Site Tour	San Francisco
San Jose Museum of Art	San Jose
San Jose Hilton	San Jose
The Tech Interactive	San Jose
Guadalupe River Park	San Jose
Pulgas Water Temple	San Mateo
Santa Clara Convention Center	Santa Clara
Santa Cruz Board Walk	Santa Cruz

Visited points of interest

Point of interest	Location
Natural Arches	Santa Cruz
The Dream Inn	Santa Cruz
California Welcome Center Santa Rosa	Santa Rosa
Balletto Vineyards	Santa Rosa
Charles Schulz Museum	Santa Rosa
Four Seasons Silicon Valley	Silicon Valley
Petaluma Visitor Center	Sonoma
Bodega Bay	Sonoma
Inn at the Tides	Sonoma
Sonoma	Sonoma
Santa Rosa Downtown	Sonoma
Hotel E	Sonoma
Filoli Historic House and Gardens	Woodside

Fog Harbor Fish House, Pier 39

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 & 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.

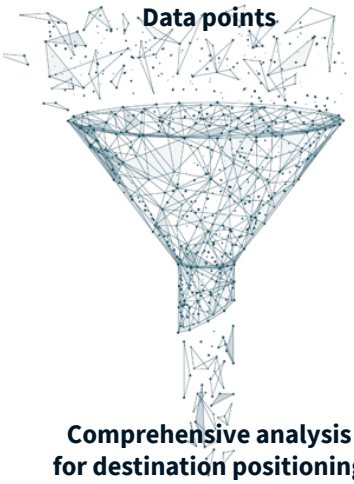
Tourism readiness index

- 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 and the World Travel & Tourism Council

75

Data points



Comprehensive analysis for destination positioning

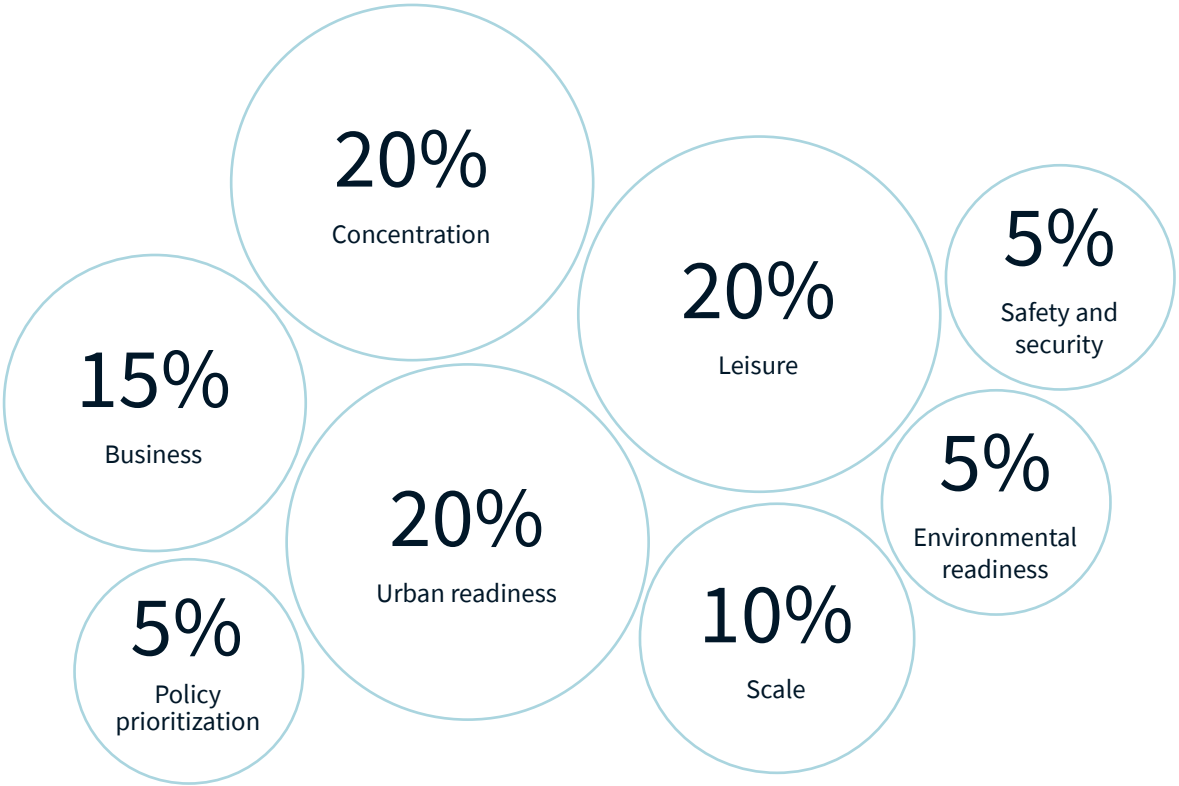
Tourism readiness index categories

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

Levels of readiness | Destination typologies

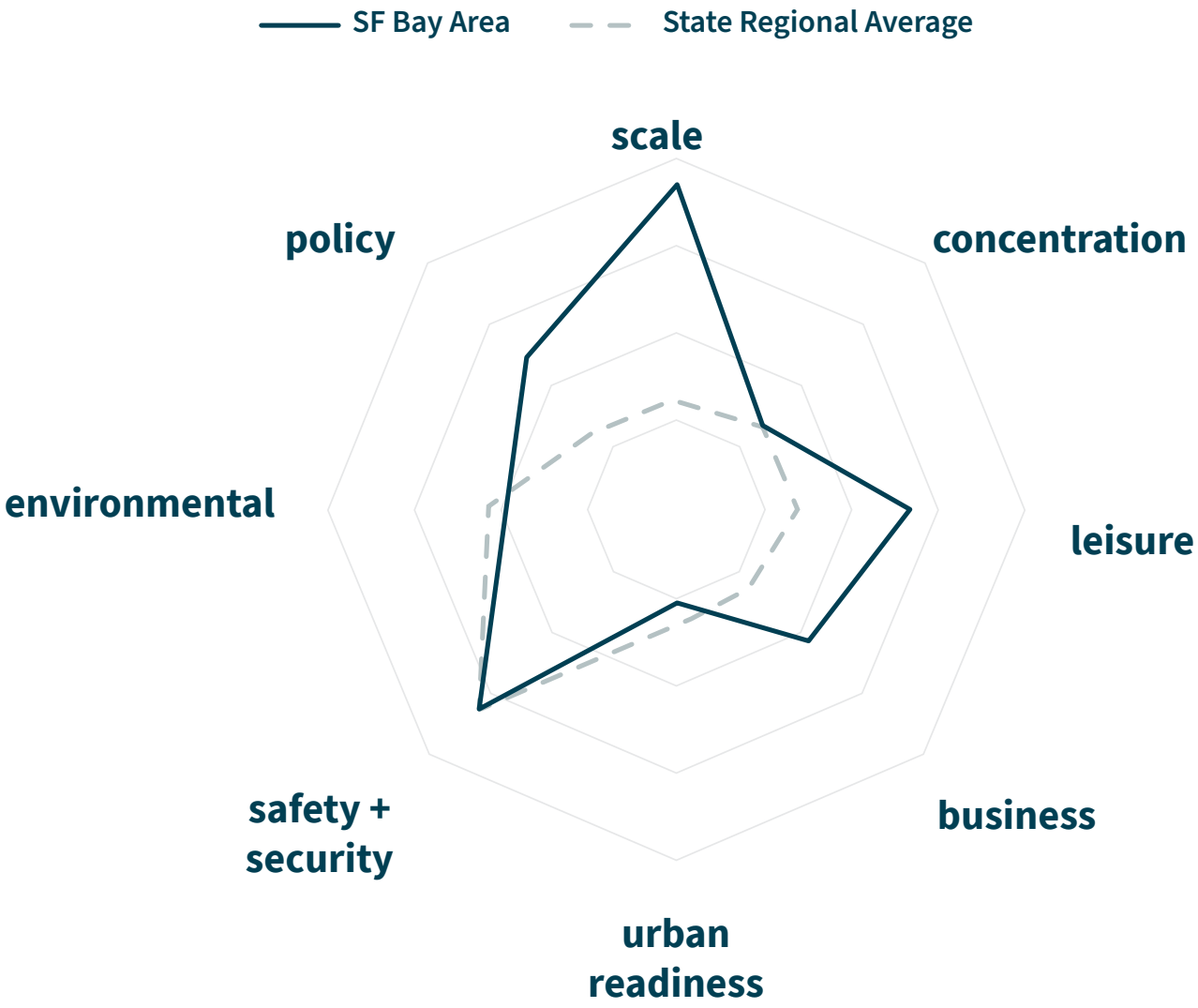
Dawning Developers	Emerging Performers	**Balanced Dynamics**	Mature Performers	Managing Momentum
Limited tourism infrastructure	Growing momentum	Established infrastructure	Strong leisure and/or business travel dynamics	Historically high growth momentum
Gradual tourism growth	Rising infrastructure	Growth 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 Central Coast results

Outcome by pillar



Demand driver scorecard

Process — multistep assessment of destination assets

Utilize 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

Utilize the outcome to identify future competitive positioning

Recommend new investment or enhancement to grow assets on the scale

Score card elements

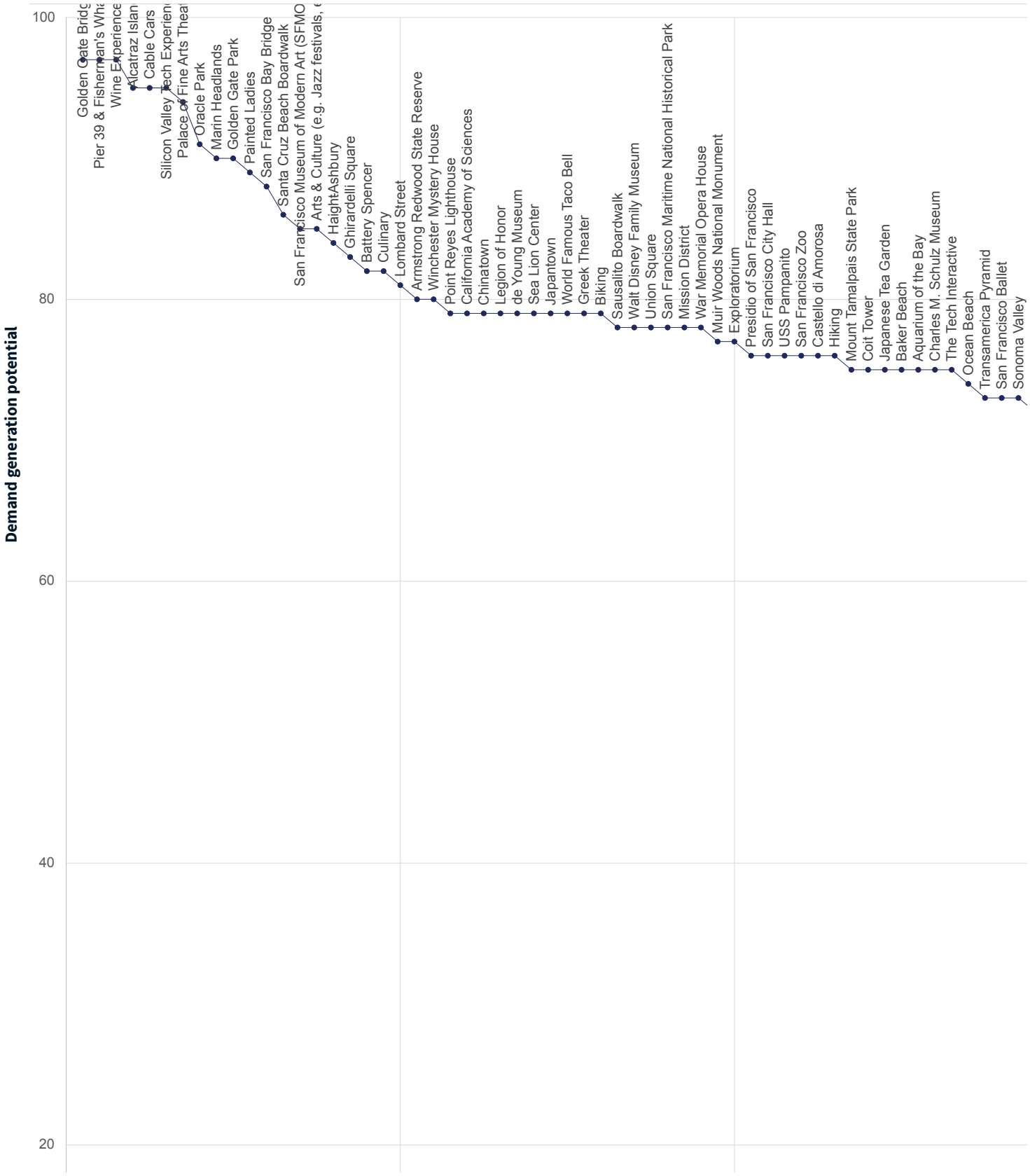
Item	Definition	Max point value
One of a kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy — 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

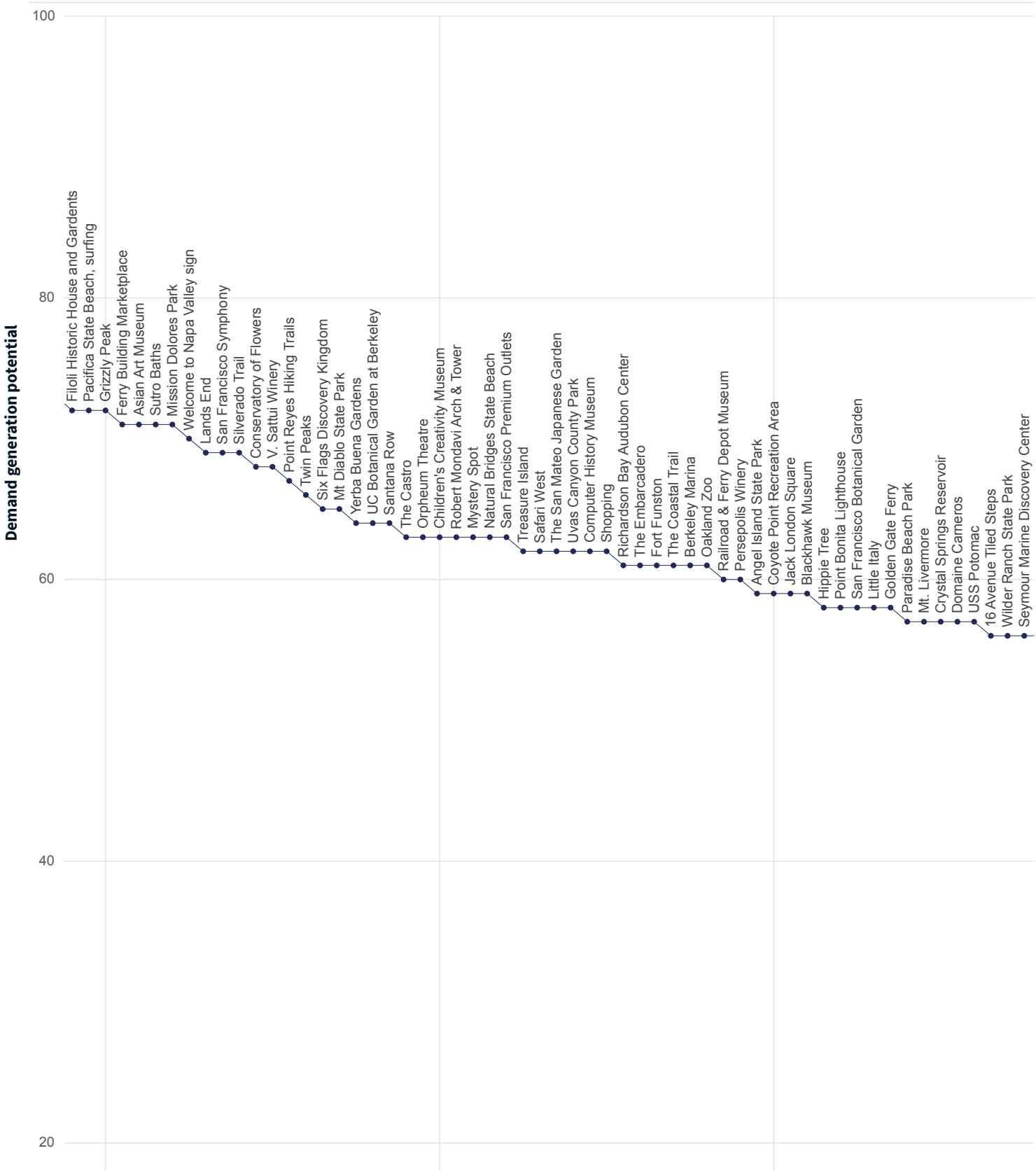
Item	Definition	Score	Max point value
One of a kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	25	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram 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

boon hotel + spa, Guerneville

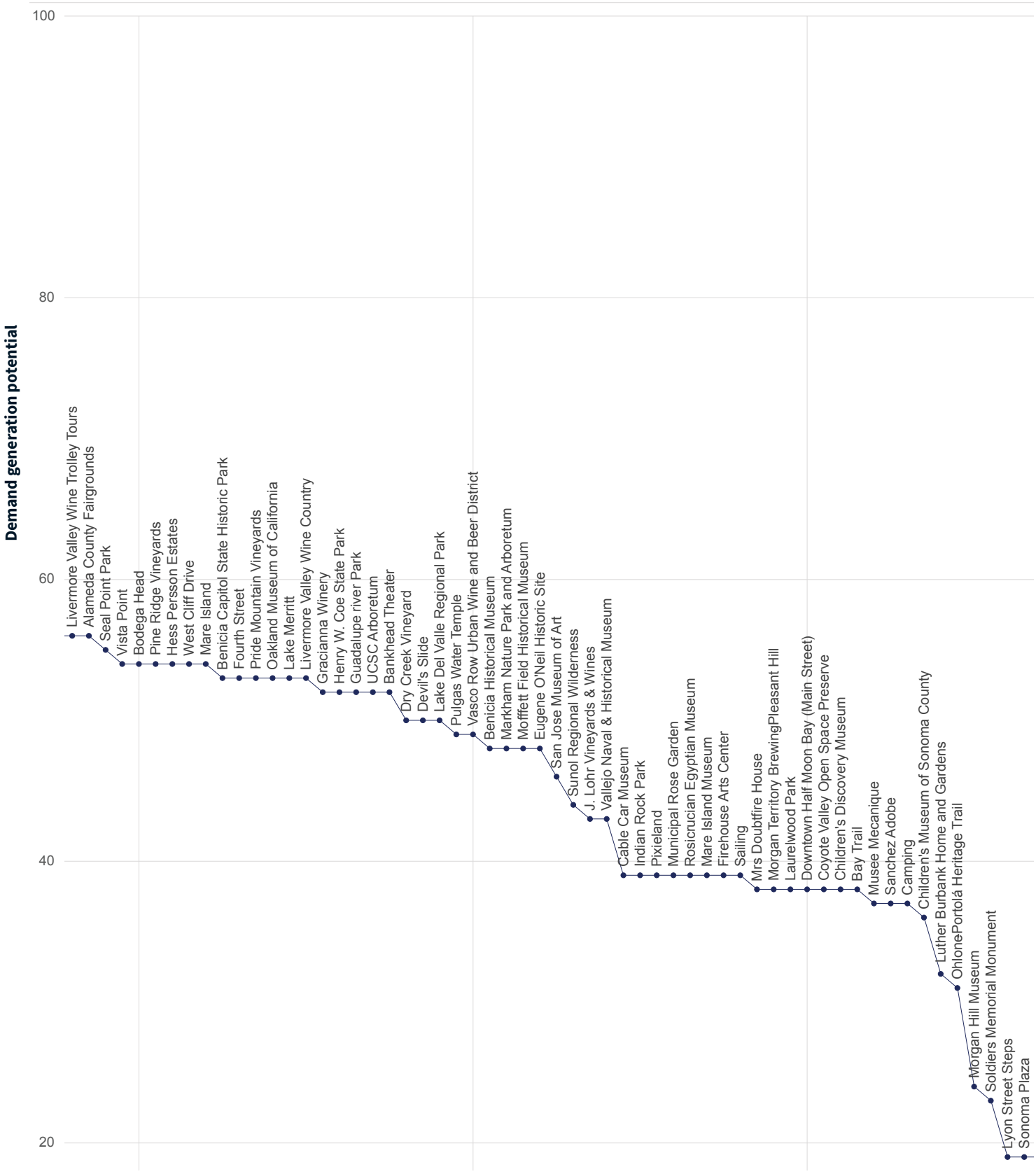
San Francisco Bay Area demand drivers



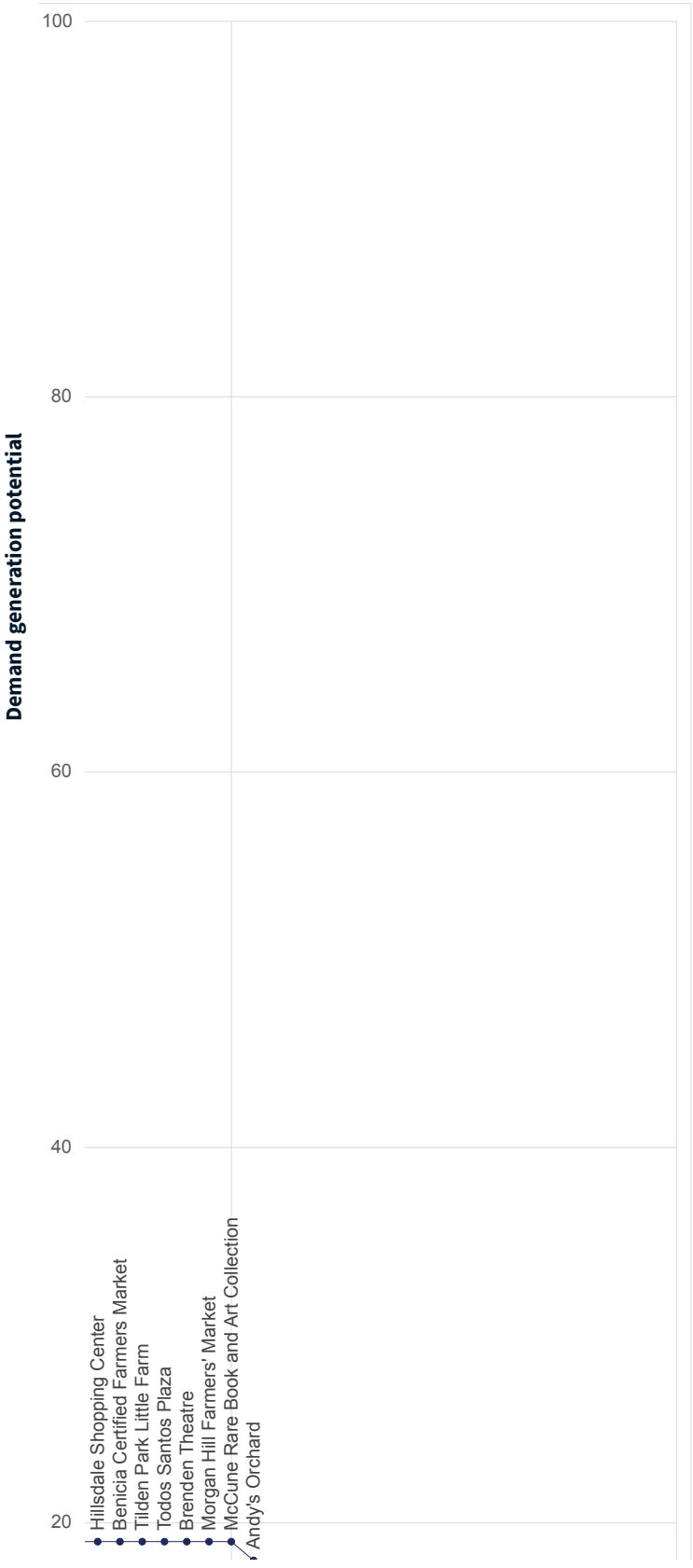
San Francisco Bay Area demand drivers



San Francisco Bay Area demand drivers



San Francisco Bay Area 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

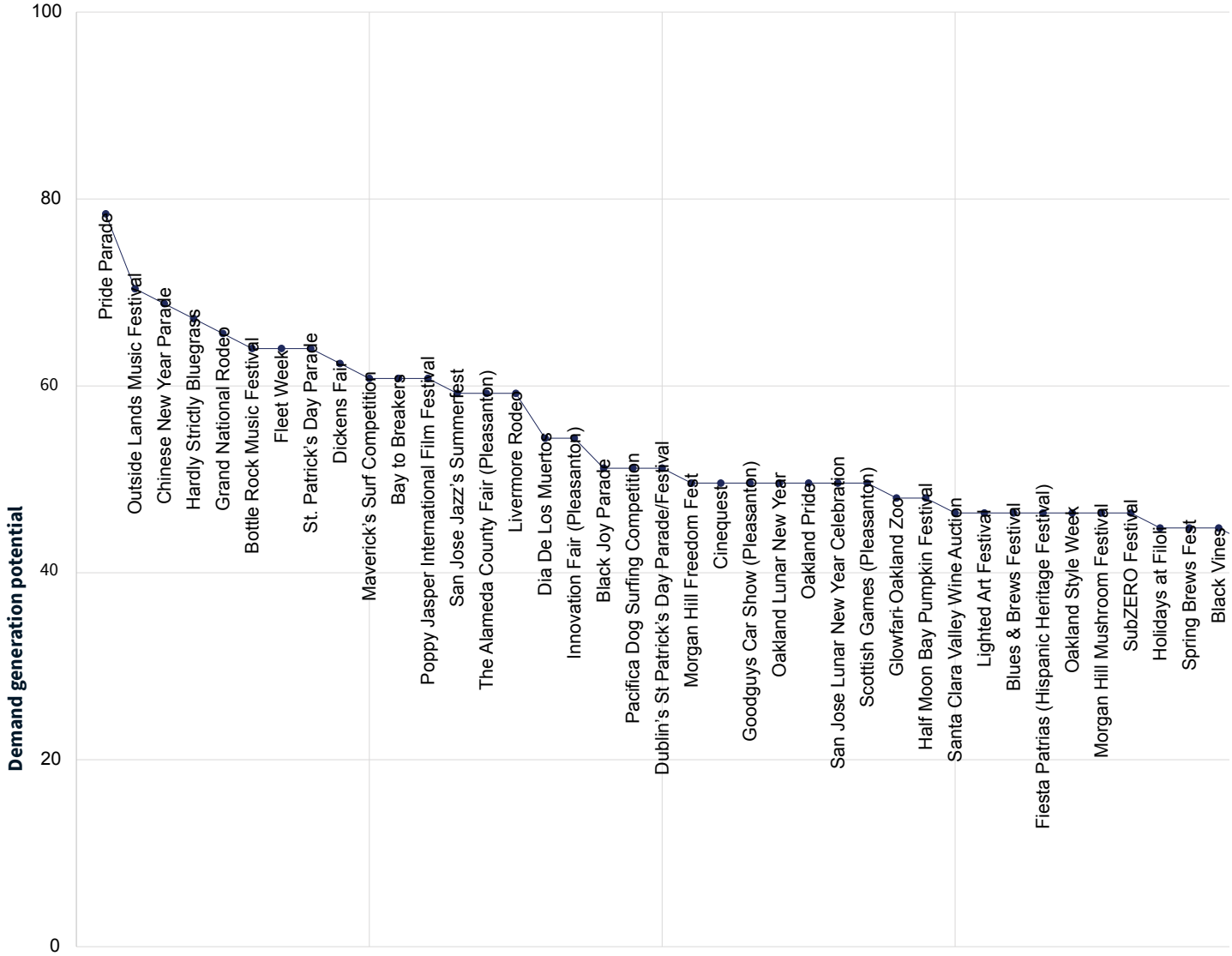
The Event Matrix tool does not directly incorporate event-related risks into final scores, as these considerations are outside its scope. However, stakeholder-identified regional risks, including public safety challenges and high liability insurance premiums due to climate-related risks have been addressed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

Grand View Restaurant, San Jose

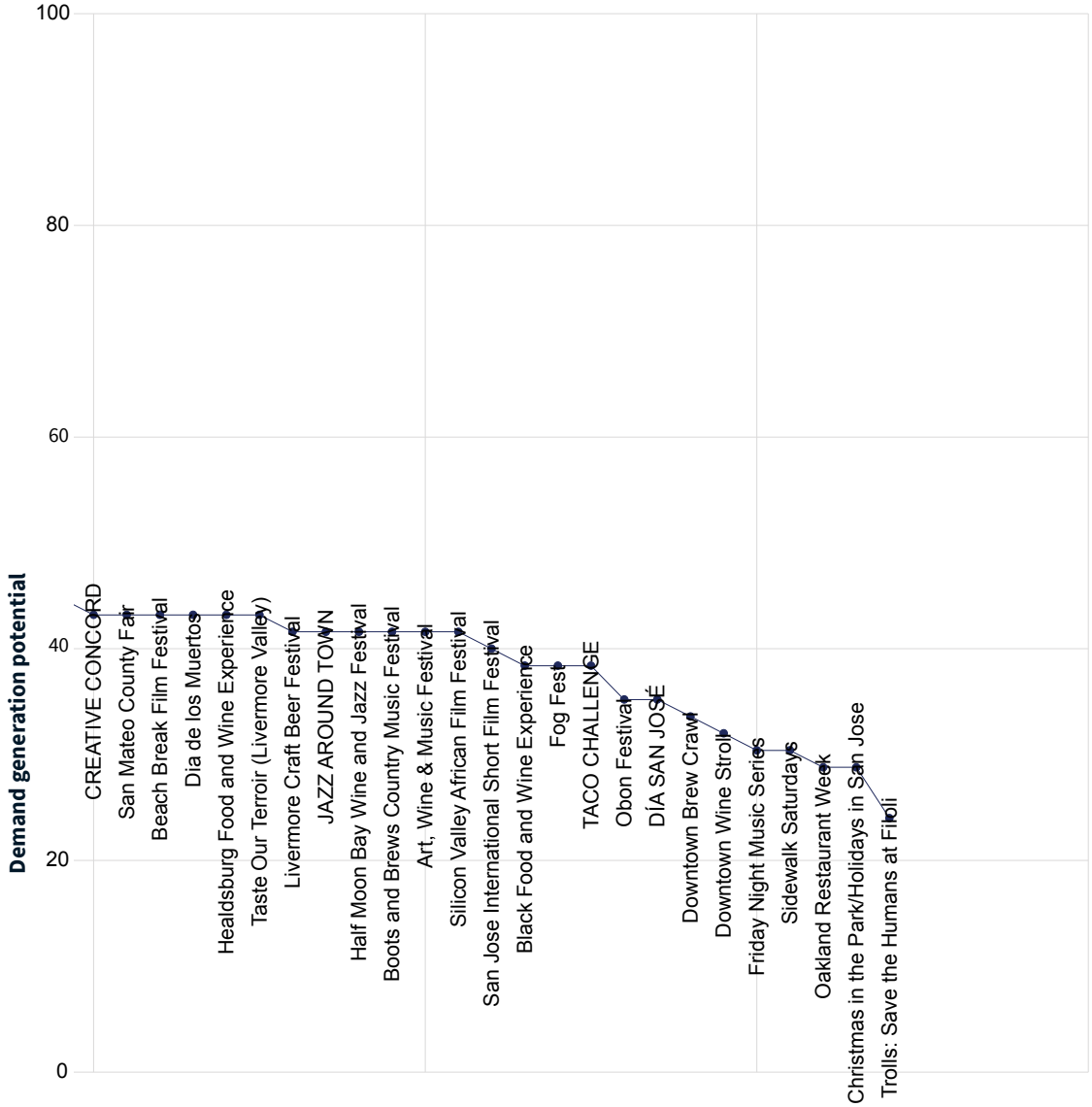
Program components

	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**

San Francisco Bay Area leisure events



San Francisco Bay Area leisure events



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