

Phase 1 Draft: Released March 3, 2025
Industry comment period ends: March 31, 2025
Submit comments to regionalplans@visitcalifornia.com



visit
California

Strategic tourism plan

Statewide Opportunities

 **JLL** SEE A BRIGHTER WAY

March 2025

The development of these regional plans was funded by a State Tourism Grant awarded to Visit California as part of the U.S. Economic Development Administration's Travel, Tourism and Outdoor Recreation program. The program invested federal funds appropriated by the American Rescue Plan Act to support states and communities whose tourism economy was damaged by the COVID-19 pandemic.

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.



From the CEO

As the leading travel destination in the United States, California has long been a beacon for travelers, drawing visitors with its diverse landscapes, world-class attractions and unmatched spirit of innovation. Continued growth requires a commitment to research, strategic planning and collaboration that ensures the tourism industry stays ahead in an increasingly dynamic and complex global landscape.

The development of these strategic tourism plans represents an important milestone in that journey, providing insights and resources to help California's travel industry navigate challenges, seize opportunities and build a more resilient future.

These plans were developed under the direction and oversight of the U.S. Economic Development Administration's Travel, Tourism and Outdoor Recreation program, which aimed to build resilience in sectors that were devastated by the COVID-19 pandemic. Through a federal procurement process, global firm JLL was retained to prepare the plans. The grant does not provide funding or staff for any implementation work, but the plans identify resources available at the state and regional levels that organizations can leverage.

The project team has worked for two years to solicit input and feedback across more than 1,500 touchpoints, including 768 individual interviews and regular meetings with 12 regional advisory committees that guided the development of the plans across each region. The plans align with strategies outlined in over 500 local destination marketing organizations (DMOs) and municipal plans reviewed by JLL. On behalf of Visit California, I extend my sincere appreciation to every individual who provided their time and expertise through this process.

Upon exploring these plans, you'll find resources designed to elevate regional tourism efforts, including:

- **Statewide Opportunities** explores resources accessible to the tourism industry across regions.
- **12 Regional Strategic Tourism Plans** provide tools such as the Demand Driver Scorecard, Event Matrix and Tourism Readiness Index.
- **12 Regional Resilience & Sustainability Scorecards** assess each region based on seven Critical Success Factors aligned with U.N. Tourism sustainability criteria.
- **California Tourism Resilience and Sustainability Dashboard** offers an interactive tool to visualize and understand tourism-related risks.
- **Sustainable & Regenerative Tourism Guidebook** outlines actions tourism stakeholders can take to encourage sustainable travel.

More than just a response to the devastation of the COVID-19 pandemic, this project embodies the resilience and determination that define our industry. Thank you for your partnership, your vision and your dedication to shaping the future of tourism in our great state. Together, we will continue to inspire travelers and drive enduring prosperity for our industry.

Sincerely,

Caroline Beteta
President & CEO
Visit California

Contents

Executive summary	6
Overview	6
1. Engage state partners for funding.....	7
Economic development — California Jobs First	7
Workforce development — Apprenticeship Innovation Fund	11
Workforce development — Employment Training Panel	12
Workforce development — JobTrain Pilot Program	13
Workforce development — Tourism Diversity Matters	14
Transportation infrastructure — Clean Transportation Program	15
Transportation infrastructure — Low Carbon Fuel Standard Program	16
2. Enhance California Welcome Centers.....	17
3. Embrace destination stewardship.....	18
Standards for sustainable travel and tourism	19
Responsible Travel Code	21
Accessible travel.....	23
Community engagement and outreach.....	24
Conclusion	25

Executive summary

California's travel and tourism industry stands at the forefront of economic opportunity, poised for growth and innovation.

Through a comprehensive and inclusive two-year process involving regional advisory committees (RACs) and nearly 800 diverse stakeholders, this process has identified key statewide issues and opportunities facing the tourism industry. This strategic plan outlines key initiatives to enhance the state's tourism sector, focusing on two primary areas: engaging state partners and embracing destination stewardship.

The plan addresses critical issues such as economic development, affordable housing, workforce development and transportation infrastructure. It proposes strategies to leverage existing state programs and new partnerships, promote sustainable tourism practices, and enhance the overall economic vitality of the state. By doing so, the aim is to not only benefit the tourism sector but also create jobs, stimulate local economies and preserve California's unique natural and cultural assets for future generations.

Crucially, this plan recognizes the value of maintaining ongoing regional dialogue as a means of staying engaged and contributing to these issues in California's regions. The collaborative process that led to this plan's development has demonstrated the power of bringing together diverse voices from across the state. This ongoing engagement will be vital in implementing the plan effectively, sharing best practices and fostering a united approach to advancing California's tourism industry. As these plans move forward, all stakeholders are encouraged to remain active participants in this dialogue, contributing their insights and experiences to shape the future of tourism in California.



The Meritage Resort & Spa

Overview

Development of the plans was significantly shaped by the contributions of 12 regional advisory committees. Over nearly two years, with monthly meetings, the committees identified several common policy issues impacting tourism in several or all regions.

Key issues identified by the regional advisory committees reaffirmed the findings of the Tourism Stakeholder Survey, which included over 870 participants representing a diverse range of individuals and organizations involved in the tourism sector:

Economic development

Tourism represents a vital segment of the California economy; however, the industry is historically underrepresented in economic development plans, policies and programs.

Affordable housing

Demand for housing far outpaces supply in every corner of the state, thereby creating challenges for the travel and tourism workforce to live in the communities they serve.

Workforce development

The post-COVID recovery of California's tourism and travel economy offers myriad employment opportunities and job openings, but openings are proving challenging to fill.

Transportation infrastructure

The iconic California road trip is not possible without well-maintained roads and access to many of the state's popular rural destinations are along routes with limited infrastructure.

Destination stewardship

The increasing sophistication of competing destinations, threats from global climate change and natural disasters, and the growing importance of sustainability in travel all point to the need for destination stewardship.

The effects of these complex issues extend well beyond the travel and tourism sector, touching all facets of the state's economy. As such, addressing these challenges requires leadership and political will from public officials to enact data-driven solutions that support iterative design and implementation over time. Such solutions are critical to explore, and the California travel and tourism industry is committed to being a constructive resource in those discussions. However, the focus of this strategic tourism planning effort is to offer tactical options for the travel and tourism industry to consider that will deliver outcomes that address the priority challenges today and over the next 10 years.

While each of the 12 regions and their respective plans contain specific strategies tailored to the region's individual characteristics and challenges, the following sections outline opportunities that apply across the state.

1 Engage state partners for funding

One of the most consistent themes reiterated by stakeholders was a concern that policymakers lack access to data and perspective on the challenges facing the travel and tourism industry. This results in decisions made and funding priorities set by state officials that may not fully consider the impacts to tourism stakeholders or the visitors they serve.

Fortunately, several key state agencies were active participants in the regional advisory committee process, including the Governor’s Office of Business and Economic Development (GO-Biz), California Department of Food and Agriculture (CDFA), and the Labor and Workforce Development Agency (LDWA). There was an eagerness on both sides — tourism stakeholders and state agencies — to work more collaboratively on ensuring the voices of the travel and tourism industry are heard in future policy plans, program designs and funding opportunities.

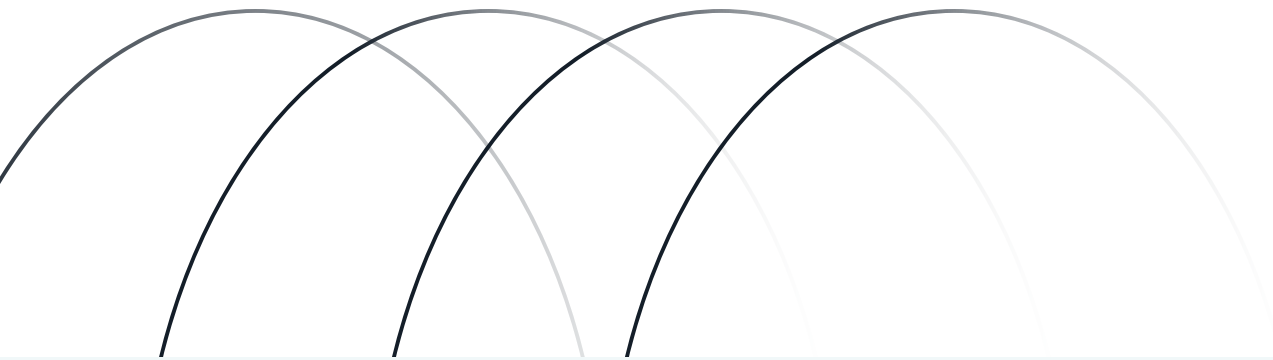
Furthermore, there are several current funding programs for economic development, workforce development and transportation infrastructure that tourism stakeholders may be eligible for but for which few travel and tourism applications have been submitted. The following sections outline the more prominent state programs and offer strategies on how interested parties can pursue funding opportunities.

Economic development – California Jobs First

The California Jobs First Council was created to focus on streamlining the state’s economic and workforce development programs to create more jobs, faster. Co-chaired by GO-Biz and LDWA, the council guides the state’s investments in economic and workforce development to create more family-supporting jobs and prioritize industry sectors for future growth.

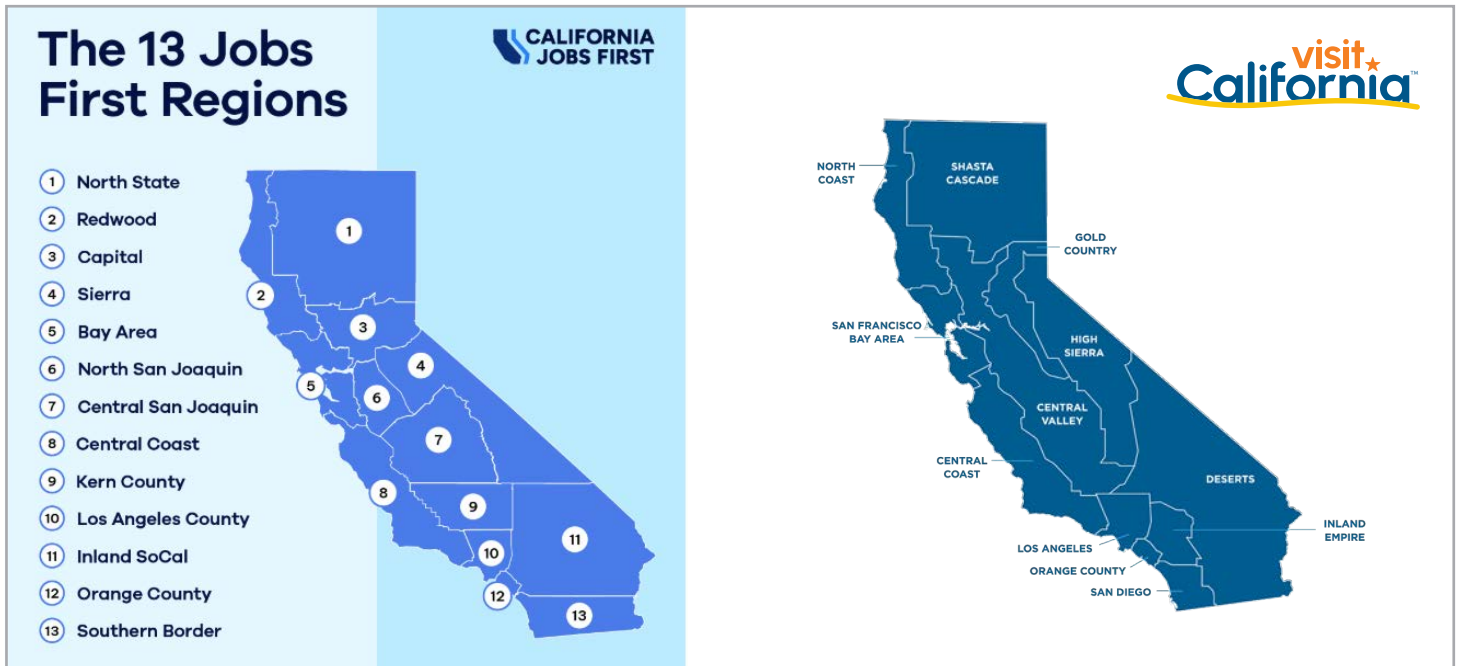
At the heart of California Jobs First is the [Regional Investment Initiative](#), an approach to economic development that seeks to ensure that as California’s economy adapts to climate change and other challenges, good-paying jobs and prosperous communities are created for the benefit of all Californians.

Tourism is one of the most accessible industries in which to work, boasting comparatively low barriers to entry. According to a [RAND Corp.](#) study, four in 10 workers were either unemployed or in school the year before coming to work in travel and tourism. Nationally, 38% of all first jobs were in travel and tourism, double the proportion of any other industry. In 2017, one-fourth of tourism employees were earning more than \$20 per hour; 12% made more than \$35 per hour (compared to a 7% national average). Nationally, those who started in tourism and then earned college degrees eventually attained a maximum annual salary of \$125,400 by the time they were 50. Those starting in tourism and got no degree also did well — averaging \$82,400.



Key to the **Regional Investment Initiative** is empowering the state's diverse regions and residents to meaningfully participate as leaders in this process. Under the Regional Investment Initiative, 13 regional governance bodies, called Jobs First Collaboratives, were established to bring together diverse partners and organizations and delivering the work products across various phases of the initiative. These 13 regions are similar to the 12 California tourism regions, but not identical, with different borders for regions in the Central Valley and southeast portion of the state.

Figure 1. California Jobs First regions vs. Visit California Tourism regions



Noyo Harbor

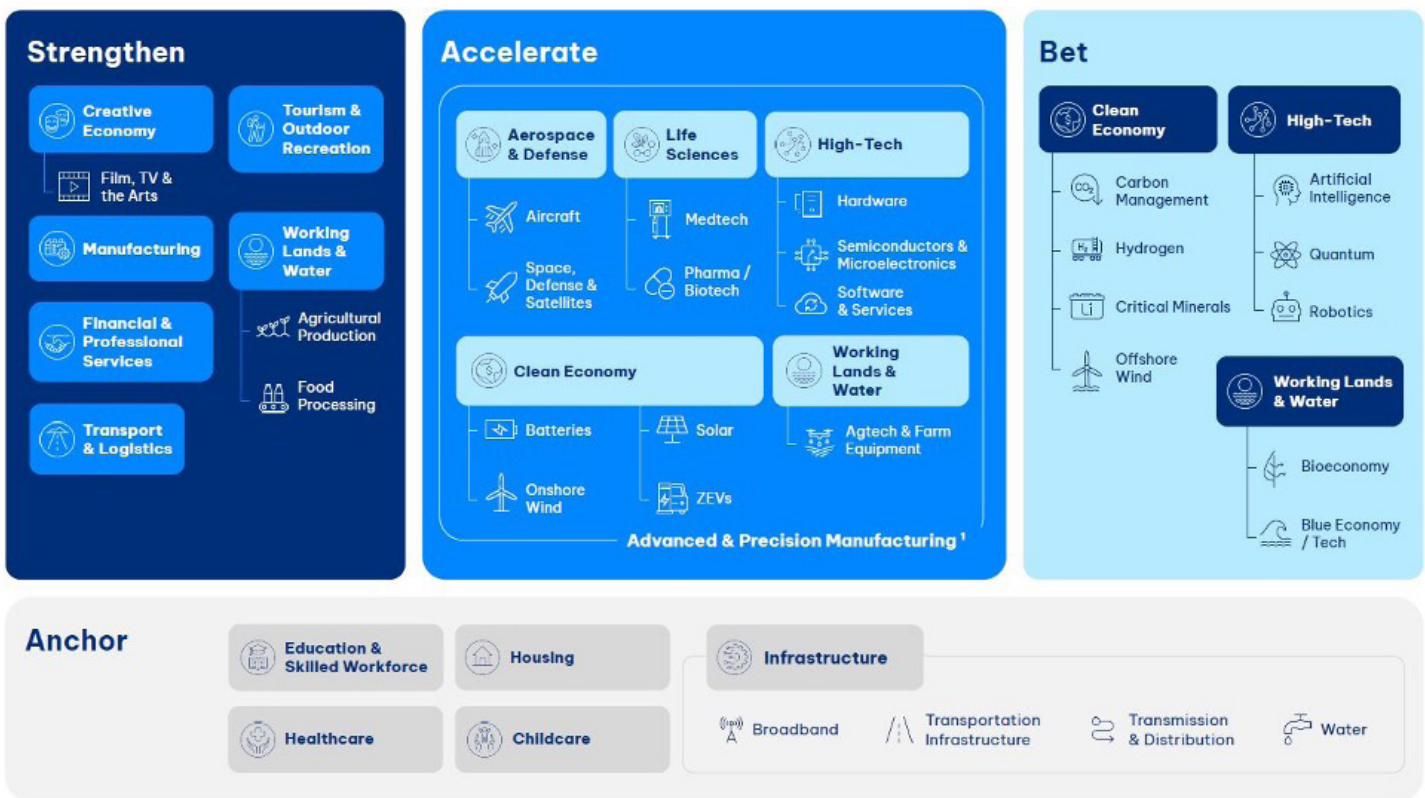
Phase I Draft: Regional strategic tourism plans | **Statewide Opportunities**

In Q3 2024, the 13 Jobs First Collaboratives issued their regional economic plans, which seek to establish a forward-looking development and transition road map with strategies that prioritize the creation and retention of high-quality jobs and emphasize sustainable and resilient industries. Many of the plans identify the contributions of travel and tourism to the local economy and as a strength to be built upon.

In February 2025, the council released the Economic Blueprint, which highlights how to meet the specific skillset needs of the state’s and our regions’ priority industry sectors.

Tourism/Outdoor Recreation is identified under the strengthen category in the sector framework for the Economic Blueprint, which serves as a project management tool for the regions to use for identifying tactics to be completed in support of the growth of the sector. The Economic Blueprint is to be accompanied by a \$120 million commitment from the governor to support “ready-to-go” job-creating projects statewide over the next three years.

Figure 2. Sector Framework for the California Jobs First Economic Blueprint



Source: [Governor's Office Press Release](#)



Piazza della Famiglia

Strategies

- Review the applicable [Jobs First Collaborative Regional Plans](#) and Economic Blueprint Activation Plans to understand opportunities for partnership and broader economic development initiatives at the local and regional level.
- Subscribe to the [GO-Biz email distribution list](#) to stay current on California Jobs First and other economic development funding opportunities.
- For the California Jobs First regions focused on tourism/outdoor recreation, connect with applicable [Regional Collaboratives](#) and GO-Biz sector coordinator regarding future funding opportunities and economic development coordination.



Beringer Vineyard

Workforce development — Apprenticeship Innovation Fund

Throughout the committee process, the Labor and Workforce Development Agency (LDWA) was an active participant in the regional meetings. LDWA showed interest throughout the engagement process in exploring a statewide apprenticeship program aimed at developing talent for the tourism industry and expanding recruitment efforts into diverse and underserved communities.

One near-term opportunity for the travel and tourism industry is the [Apprenticeship Innovation Fund \(AIF\)](#) housed in LDWA and administered by the Department of Industrial Relations (DIR) Division of Apprenticeship Standards (DAS). The fund was established as a source for new and innovative apprenticeship programs.

The state allocated \$135 million to be spent over fiscal Years 2022-23 to 2024-25. The state allocated \$55 million in FY 2022-2023 and \$40 million in FY 2023-24 to support ongoing program costs and classroom training. In the initial 2022-23 round of funding, \$17.3 million was awarded, and the 2023-24 round distributed \$24.7 million, leaving a balance of approximately \$93 million in available funding for the two program categories: [AIF-Support and AIF-Training](#).

AIF-Support (AIF-S) covers the cost of running an apprenticeship program, aggregating employer demand, and recruiting, supporting, and placing apprentices. While this funding may not fully reimburse all costs of running an apprenticeship program, the aim is to significantly offset the program sponsors' ongoing costs. The funding amount is \$3,500 per active apprentice per year, prorated to the month, along with a completion bonus of \$1,000 per apprentice.

AIF-Training (AIF-T) covers the cost of training apprentices and allows for new training programs to develop in a more agile manner. The AIF-T funds are intended to provide a more flexible and accessible source of funding for the training of apprentices. Every apprenticeship program registered with the Division of Apprenticeship Standards is required to work with a local education agency, and the agency is the recipient of the AIF-T funding. As such, travel and tourism businesses can benefit from these funds through partnering with a public educational institution such as a community college or California State University or University of California campus.

Awardees include businesses from the travel and tourism industry, including Kitchens for Good based in San Diego and the Hospitality Training Academy in Los Angeles.

Strategies

- Contact the [Division of Apprenticeship Standards](#) for more detailed information about the AIF application process, selection criteria, and award priorities to determine whether to pursue AIF-S or AIF-T funding.
- Subscribe to the DAS [CA Apprenticeship e-Newsletter](#) to receive updates on a variety of apprenticeship-related topics, including future rounds of funding.
- Apply for AIF-S funding to reimburse the cost of running an apprenticeship program to bolster the workforce of today and tomorrow.

Workforce development — Employment Training Panel

A second Labor and Workforce Development Agency program is the [Employment Training Panel \(ETP\)](#), which is a statewide business-labor training and economic development program. The panel provides funding to employers to assist in upgrading the skills of their workers through training that leads to good-paying, long-term jobs. ETP was created in 1982 by the California Legislature and is funded by California employers through the Employment Training Tax. Through ETP, businesses determine their own training needs and how to provide training. ETP staff is available to assist in applying for funds and other aspects of participation.

Unlike AIF, which is funded through the General Fund — and therefore subject to cyclical budget uncertainty — ETP grants are funded through a special payroll tax and are therefore consistently available. The program’s revenue comes from California employers and targets support to firms threatened by out-of-state competition or who compete in the global economy. Since its inception in 1982, ETP has reimbursed employers well over \$1 billion for training workers in more than 80,000 businesses.

ETP is a performance-based program, providing funds for trainees who successfully complete training and are retained in good-paying jobs at a required minimum wage for at least 90 days. According to the [2022-23 Annual Report](#), accommodation and food services, as an industry, earned a little over \$82,000 in Core Funded Contract funding from ETP. The \$82,000 for accommodation and food services represents just 0.15% of the \$54.3 million in funding. The earned amount for accommodation and food services went to 13 businesses and supported 39 trainees. For perspective, 2,730 total businesses and 43,087 trainees participated in Core Funded Contracts.

Building off the stated interest of regional advisory committee participants and the LDWA to work collaboratively, the ETP program is an example of an existing program that could be of greater benefit to the travel and tourism industry with a modest investment in coordination.

Strategies

- Connect with the [ETP Economic Development Unit](#) and an [ETP Regional Office](#) to better understand program requirements, project design opportunities to explore new funding and on leveraging other funding.
- Subscribe to the [ETP mailing list](#) to stay current on ETP funding opportunities.
- [Apply for ETP funding](#) to reimburse the cost of providing employees with training and professional development.

Workforce development — JobTrain pilot program

During the planning process, a pilot program was developed with JLL and [JobTrain](#), an award-winning workforce development organization based in the Bay Area, that empowers individuals through comprehensive training programs and job placement services to build successful careers and contribute to the local economy. Focusing primarily on urban regions, JobTrain provides programs for post-incarceration populations as well as unhoused populations to reintegrate into the workforce through comprehensive training as well as connecting them to potential employers.

Since its inception, more than 190,000 low-income individuals and their families have benefited from JobTrain’s programs. This pilot program focuses on the development and implementation of a two-week Hospitality Career Workstream, with an emphasis on prioritizing training opportunities specifically targeted to individuals currently experiencing homelessness or just exiting homelessness. The goal is to establish content that creates a strong foundation of knowledge and skill that will create a workforce pool to meet the needs of entry-level hospitality vacancies held by local hotels, restaurants, and the greater communities served by JobTrain.

Being that this will be a new strategy for workforce development in the hospitality sector, the program will be rolled out in cohorts over several phases (see Appendix for a detailed description of the program). Based on the results of the pilot cohorts, this program has been discussed with the LWDA as a model for tourism-specific workforce development that could be expanded upon with state support in the future.

Strategies

- Implement regional cohorts of the Hospitality Career Workstream pilot program in the Bay Area and gather quantitative and qualitative data on program efficacy.
- Evaluate and review outcomes of the pilot cohorts, including lessons learned and recommendations for future program design.
- Share pilot program findings with Visit California and the Labor and Workforce Development Agency.

Workforce development — Tourism Diversity Matters

Recognizing the importance of diversity in the tourism industry, it is vital to prioritize intentional efforts to create a welcoming and representative environment. In alignment with the Justice 40 principles, which aim to ensure that at least 40% of all related investments benefit underserved communities, the tourism industry can address socioeconomic disparities and advance equity.

California Travel Association highlights the significant impact of DEI in the tourism industry. Companies with diverse leadership teams have proven to achieve better financial performance, underscoring the economic benefits that arise from embracing DEI practices.

DEI efforts in the tourism industry contribute to economic mobility within underserved communities. By ensuring that investments and opportunities reach disadvantaged communities, the industry cultivates economic empowerment and expands economic opportunities for historically marginalized groups.

In efforts to collaborate with the U.S. Department of Labor, there has been a successful partnership with [Tourism Diversity Matters](#) to develop a tourism-specific apprenticeship program. This program is designed to address the unique needs of the tourism and hospitality sector, focusing on talent development, proactive recruitment, diversity and inclusion. By working with regional workforce development partners and host businesses, regions can participate in effective paid apprenticeships, providing individuals with valuable experience and creating a pipeline for long-term careers in the industry. Through targeted outreach to diverse and underserved communities, this apprenticeship program contributes to economic growth and provides job opportunities for individuals transitioning into the tourism and hospitality workforce.

The detailed outline of the program, including the timeline, expectations and qualification requirements, can be found in the Appendix.

Strategies

- Develop clear Tourism Diversity Matters eligibility requirements, such as being at least 20 years old, identifying as a member of an underrepresented group or community, having relevant work experience of at least one year, and successfully passing a background check.
- Establish rotation opportunities for the TDM apprentices with hospitality and tourism industry partners, including hotels, convention centers, destination management organizations, airlines, sports teams, restaurants, and attractions.
- Offer TDM apprenticeships across destinations, events or sports tracks that align with the professional goals of the apprentice.
- Regularly assess the effectiveness and impact of the TDM apprenticeship program, gathering feedback from apprentices, host organizations and partner organizations.

Transportation infrastructure — Clean Transportation Program

With electric vehicle sales increasing significantly in key global tourism markets — EVs already exceed 50% of the new car sales in China – and California’s own commitment to phasing out gas-powered cars by 2035, providing EV charging will soon be essential for destinations and tourism stakeholders to remain competitive. However, installing and maintaining EV chargers can be prohibitively expensive. Fortunately, California offers funding programs to help manage the costs for which tourism stakeholders are eligible.

The Clean Transportation Program (CTP) is a program of the California Energy Commission (CEC) that has invested billions in clean transportation infrastructure projects since 2008. CEC annually invests up to \$100 million annually in CTP projects as guided by the annual investment plan update. For **2024-2025**, CEC proposes to allocate \$479 million for light-duty charging infrastructure between fiscal years 2024-2025 and 2027-2028.

Of most relevance to the travel and tourism industry is the **California Electric Vehicle Infrastructure Project (CALeVIP)**, which the funds installation of publicly available EV chargers. In 2021, CEC made available up to \$250 million through CALeVIP, of which only about \$30 million has been spoken for. It is anticipated there will be one or two additional CALeVIP funding cycles annually over the next few years that tourism stakeholders could pursue to help fund the installation of EV chargers at their sites.

Strategies

- Subscribe to the [CALeVIP email list](#) to receive updates about upcoming funding opportunities and informational webinars.
- Take advantage of free [CALeVIP technical assistance](#) and applicant resources to help plan an EV charging project.
- Contact your electricity provider to understand their processes for installing EV chargers and to inquire about special rates and/or utility incentives for EV chargers.
- Partner with businesses including equipment manufacturers, installers and electricians, network providers, and equipment distributors and re-sellers, which can help with planning a CALeVIP application through [CALeVIP Connects](#).



L'Apero les Trois, Winters

Transportation infrastructure — Low Carbon Fuel Standard Program

Complementing CALeVIP from the CEC is the [Low Carbon Fuel Standard \(LCFS\)](#) program established by the California Air Resources Board (CARB), which offers another funding stream for tourism stakeholders interested in installing EV chargers.

LCFS is a regulatory program whose primary purpose is to reduce the greenhouse gas emissions of California’s transportation fuels and support the development of cleaner alternatives. Under LCFS, producers of cleaner fuels (e.g., electricity for EVs) generate credits that can then be sold to producers of high-emissions fuels (e.g., gasoline and diesel) to meet LCFS compliance obligations.

LCFS’s credits represent a significant revenue source that can offset the costs of installing and operating EV chargers. Since LCFS’s inception in 2011, [CARB](#) estimates that LCFS has generated 6.3 million LCFS credits from electricity used to charge EV, resulting in over \$1 billion in revenue from EV charging.

Revenue from the sale of LCFS credits can be combined with CALeVIP rebates, as well as the federal [Alternative Fuel Vehicle Refueling Property Credit](#), to significantly lower the costs to install EV chargers. Adding EV chargers as an attractive amenity has never been more financially viable for tourism stakeholders, and visitor demand for charging is only going to increase.

Strategies

- Contact the [CARB team](#) for more information on the LCFS program and to better understand how it could support the installation of EV chargers at a specific site.
- Contact your electricity provider to understand their processes for installing EV chargers and to inquire about special rates and/or utility incentives for EV chargers.
- Upon installation of an EV charger, register through the [LCFS System](#) to generate credits.

2 Enhance California Welcome Centers

It's the mission of each of the 23 California Welcome Centers (CWCs) scattered across the state to enable all visitors to have the best experience possible, and they take that local-is-best approach to heart. Each one is staffed with personal travel concierges, knowledgeable experts ready to provide information to enhance and enrich a traveler's visit no matter what their focus: the arts, local culture or ecological crossroads. The centers serve travelers by providing destination, attraction, performing arts and accommodations brochures, and providing internet access, regional merchandise and ticket sales.

The traditional strength of the CWC networks is the in-person services they provide, including the expertise of their staff and the printed materials they offer visitors, such as maps and brochures. A 2024 survey of the center managers conducted by the Travel Analytics Group at the behest of the Welcome Centers found changes in visitor demographics and technology offer opportunities to build upon their excellent foundation of services by offering additional digital resources:

- None of the managers responded that they are seeing more younger visitors; in contrast, 55% reported seeing increases in middle-age (30-50 years old) and older (over 50) visitors.
- The most requested information are maps, brochures on local attractions, and dining options and referrals.
- The most popular additional services, among managers, that would improve the centers were user-friendly digital displays, additional interactive digital kiosks, and QR codes for quick access to information.
- CWC managers rank in-person local CWC staff and technology-based resources as equally important in the future.
- Two-thirds of CWC managers indicate expanding partnerships, and 60% say exhibiting local arts, culture, and heritage represents the biggest opportunities to increase the value and importance of the CWC.

Overall, the research suggests physical and in-person aspects of the centers are still very much relevant, especially to middle-aged and older visitors, but that a layered digital approach may present opportunities to serve a broader, younger audience before, during, and after their visit. The rise of digital platforms and mobile applications has led to alternative sources of information for travelers. Many visitors now prefer to plan their trips online, using search engines, travel websites, review platforms and social media, which is reflected in the CWC manager feedback.

Strategies

- Expand California Welcome Center services and resources to meet the needs of today's online traveler:
 - Additional digital, immersive experiences on-site, including user-friendly displays and kiosks
 - Online resources on center websites and social media accounts to assist visitors in planning their trips and in connecting with local restaurants, arts/culture and attractions.



3 Enhance destination stewardship

The value in cultivating a sustainable travel and tourism brand and the need to provide research and resources to support the industry's embrace of destination stewardship principles has never been clearer.

A report from the World Travel and Tourism Council underscores the importance of promoting sustainable travel and tourism in California. Continued growth in visitation means that some destinations will experience visitation levels that overwhelm capacity. There is broad consensus that more visitors than a destination has the capacity to handle can lead to a range of negative impacts, including:

- Alienated local residents
- Degraded visitor experience
- Overloaded infrastructure
- Damage to nature and natural resources
- Threats to culture and heritage

If left unaddressed, social, economic and environmental challenges related to tourism will decrease travel spending in California and threaten the industry's future.

At the same time, the state's existing reputation as an environmentally and socially progressive destination can be a competitive advantage with a growing number of consumers in the U.S. and worldwide. California is an established leader in sustainability policies with ambitious climate change, clean energy, clean transportation, equity and waste reduction goals, including:

- Statewide, economywide carbon neutrality by 2045.
- 100% of electric retail sales from renewable and zero-carbon resources by 2045.
- 100% of new light-duty vehicle sales from zero-emission vehicles by 2035.
- At least 25% of proceeds from the state's greenhouse gas Cap-and-Trade Program must be allocated to disadvantaged communities.
- Reduce organic waste 75% (5.7 million tons) by 2025.

These aspirations have also taken hold at the local levels, with many of California's 58 counties and 482 incorporated communities adopting their own sustainability targets, climate action plans and net zero goals, among others.

Throughout this regional planning process, resiliency and sustainability were reinforced as critical to the industry's success. Analysis was completed in each of the 12 regions through a scorecard assessment of each region's resiliency and sustainability planning, implementation and consistency. The scorecards were created with both quantitative and qualitative aspects of the study. The quantitative analysis included 158 data points per region, and the qualitative inputs included 460 data points per region. In total, 7,416 data points were analyzed across the state for this process.

The results of the assessment indicate a statewide need for action to preserve the long-term viability of the tourism industry in California.

The following sections detail strategies and resources that support destination stewardship at the business, destination, regional and state levels.

Standards for sustainable travel and tourism

The 2024 Sustainable Travel Report from Booking.com underscores an opportunity for the travel industry to make sustainable choices easier for consumers who, according to the research, reveal an emerging sense of weariness around sustainable travel. A gap between sustainability awareness and action exists among consumers, who indicate a greater preference for sustainable travel in polling than in travel decision-making. The Sustainable & Regenerative Tourism Guidebook, created as part of this Regional Strategic Tourism Plan process, outlines academically tested practical approaches to make visitors behave in more environmentally friendly ways, with the most successful approaches involving change implemented by hospitality businesses, versus expecting and compelling change from customers.

The Booking.com report states that consistency of certification standards is desired by consumers, with 67% agreeing that all travel booking sites should use the same sustainable certifications or labels. Similarly, the global travel and tourism industry increasingly recognizes the value in uniform standards for sustainable tourism, with the predominantly recognized international standards overseen by the Global Sustainable Tourism Council (GSTC). Adhering to uniform standards to make your business or destination more sustainable will improve the visitor experience by making sustainable choices easier for consumers and can enhance goodwill with residents who value your commitment to being good stewards of your destination.

Visitor sentiment toward sustainable tourism is nuanced. On the one hand, Booking.com's 2024 Sustainable Travel Report reveals that 83% of global travelers said that sustainable travel is important to them and that 75% report that they want to travel more sustainably over the next 12 months. However, 45% also responded that they feel traveling more sustainably is important, but not a primary consideration, and 28% reported they are tired of hearing about climate change. One-third said they feel the damage already done is irreversible and that the travel choices they make are not going to change that. Similarly, 34% of travelers believe that traveling more sustainably feels pointless when the destination itself is not implementing sustainability practices.

To meet the intentions of travelers who may want to be more sustainable while recognizing those intentions may only be realized if sustainability is convenient, California tourism stakeholders need to pursue sustainability strategically. One of the most common means to demonstrate leadership in sustainable tourism is to seek third-party certification and validation of their efforts. The recognized international standard for sustainable tourism is overseen by the **Global Sustainable Tourism Council® (GSTC)**.

GSTC establishes and manages global standards for sustainable travel and tourism, known as the GSTC Criteria. There are four sets:

- Destination criteria for public policymakers and destination managers
- Industry criteria for hotels and tour operators
- MICE criteria for venues, event organizers and events and exhibitions
- Attraction criteria for tourist attractions such as theme parks, museums, and national parks.

These sets of criteria are the result of a worldwide effort to develop a common language about sustainability in tourism. They are arranged in four pillars: (A) sustainable management; (B) socioeconomic impacts; (C) cultural impacts; and (D) environmental impacts. Because tourism destinations each have their own culture, environment, customs, and laws, the criteria are designed to be adapted to local conditions and supplemented by additional criteria for the specific location and activity.

GSTC defines certification as a voluntary, third-party assessment, through an audit, of a tourism enterprise or destination for conformity to the GSTC criteria. GSTC does not conduct certification but rather accredits those bodies that do certify.

GSTC Accreditation is a designation of certification bodies who demonstrate their capability to issue certifications based on merit and neutrality. Being GSTC-Accredited means that the certification body conducts certification in accordance with processes compliant with international standards and best practices.

GSTC recognition is a status GSTC designates to a set of standards that are equivalent to the GSTC criteria. This means that the GSTC has verified that the standard aligns with the GSTC criteria and that any additional clauses do not contradict GSTC Criteria requirements. GSTC recognition does not ensure the certification process is reliable, only that the set of standards used to certify includes the minimum elements to ensure sustainability.



Strategies

- Consider certification through a GSTC **Accredited Certification Body** to demonstrate compliance with the most widely accepted and respected standards on the market.
 - Even if actual certification is not an option immediately, understanding the criteria can inform incremental steps to be taken to be more sustainable.
- Connect with a GSTC-recognized standard for destinations, such as **Destination Wayfinder Framework & Standard** or **Green Destinations Standard**, for ongoing support in setting and progressing on sustainability goals, in addition to certification.
- Explore establishing GSTC-recognized standards tailored to California and reflect the state's priorities and values.

Responsible Travel Code

Excessive or irresponsible visitation can damage natural or cultural resources that define a destination, and even moderate visitation can lead to undesirable impacts. Fortunately, in Booking.com's [2024 Sustainable Travel Research Report](#), a noteworthy 71% of travelers say they want to leave the places they visit better than when they arrived (up from 66% last year), and 45% think they themselves have the potential to counteract the social impacts of travel.

Harnessing these intentions of visitors to be more responsible during their travels is of critical importance, as the tourism industry's long-term viability depends on its ability to promote the traveler experience in a manner that engenders support from local residents.

In 2023, Visit California contracted with Omnitrak to build off their national study to provide a deep dive on California resident sentiment. [The results from the California study](#) tell an important story. Sixty percent of California's residents have a highly positive perception of the state's travel and tourism industry. Over half the state's residents view the tourism economy as having a highly positive impact on local jobs and tax revenue.

A key initiative to maintaining and improving upon this positive baseline of resident sentiment is Visit California's [Responsible Travel Hub](#), which offers California visitors resources on how to travel respectfully and responsibly to the state's myriad destinations. In particular, the California Responsible Travel Code sets the stage for what is expected of travelers to the Golden State, as reflected in the R.E.S.P.E.C.T. messaging framework:

Roam responsibly

Educate myself

Seek out locals

Preserve california

Embrace community

Celebrate culture

Teach others



Napa Valley Wine Train

Accompanying the Responsible Travel Code is a **toolkit** for tourism businesses and destinations to amplify the R.E.S.P.E.C.T. message to travelers.

The California Responsible Travel Code draws on similar principles to the U.N. Tourism **Tips for a Responsible Traveler**, which was revised in 2020 as a response to the COVID-19 pandemic. Similarly, the Responsible Travel Code was an integral part of pandemic efforts to facilitate travel to California in a manner that encouraged safe behavior and compliance with evolving public health guidance. A refresh of the Responsible Travel Code content and resources would improve their applicability for travelers to California of today and the future and continue to encourage them to be thoughtful during their visit, thereby reducing potential friction with local residents and degradation to the environment.

Strategies

- Refresh the California Responsible Travel Code consumer website content and the toolkit for tourism businesses and destinations.
- Leverage Visit California’s Global Influencer Advisory Board to find ways that influencers can help shape visitor behavior norms.
- For destination marketing organizations and tourism businesses, use the Responsible Travel Code resources to foster responsible travel behavior in their respective locales and establishments.



Accessible travel

World Health Organization research cited by [U.N. Tourism](#) notes that there are 1.3 billion people worldwide, or 16% of the global population, experiencing significant disability and that travelers with disabilities are accompanied by two to three additional clients. Within the European Union, more than 70% of the 80 million persons with disabilities can afford to travel and enjoy tourism. In Asia and the Pacific, the potential market size is 690 million people, and in Latin America and Caribbean, this figure reaches 85 million people.

To help destinations and businesses tap into this potential, U.N. Tourism released six sets of guidelines produced by U.N. Tourism, ONCE Foundation and Spanish Association for Standardization, in collaboration with the European Network for Accessible Tourism and many other partners. These guidelines offer strategic and actionable recommendations to provide accessible tourism experiences so every person can enjoy travel and tourism on equal terms.

Similarly, [Destinations International](#) and [TravelAbility](#) have jointly released the [Accessibility Playbook](#), a comprehensive guide aimed at improving travel experiences for people with disabilities. The Accessibility Playbook has six parts that guide users to establish the business case, create a strategy, get started with digital accessibility, plan a communications strategy and enhance the visitor experience. The new toolkit provides destinations and travel businesses with resources to enhance their accessibility and inclusion initiatives.

For destinations committed to accessible travel, [Wheel the World](#) provides travelers with disabilities detailed information and experienced customer service about accessible travel experiences at more than 250 destinations. [Visit Oakland](#) and [Visit Huntington Beach](#) are [Destination Verified](#) partners that have earned the Wheel the World seal of approval that signals to travelers that these destinations have hotels, activities, transportation and restaurants all guaranteed for accessibility. The process of becoming Destination Verified provides destinations with accessibility insights and recommendations, a promotional landing page showcasing the destination's accessible tourism options, inclusion in the Wheel the World website and booking solution and access to the Wheel the World Academy, which offers training to improve destination staff knowledge of accessible tourism.

These are a small sample of the resources available now to support tourism enterprises and destinations to expand their reach and services to the underserved market of travelers with accessibility needs.

Strategies

- Review the applicable U.N. Tourism guidelines for accessible travel to better understand how to improve accessibility and serve travelers with accessibility needs.
- Acquire the Accessibility Playbook, or similar resource, to develop an actionable strategy to address accessibility for travelers across the four common types of disabilities.
- Pursue validation through an independent body, like Wheel the World, to make necessary improvements and earn recognition as a destination committed to and capable of serving travelers with accessibility needs.

Community engagement and outreach

Without formal efforts, residents may feel excluded from the decision-making process regarding tourism development, leading to a sense of disenfranchisement and contributing resistance to new projects. In the absence of mechanisms for resident engagement in tourism planning and management, opportunities for community input and collaboration can be missed.

Dedicated resident-tourism liaison town halls can serve as a bridge between the local community and the tourism sector, ensuring that residents' concerns and interests are considered in tourism development. Residents will be able to attend the town halls hosted and supported by the destination.

Strategies

- Hold annual town hall meetings with community members to gather feedback and discuss tourism-related issues.
 - Describe the specific initiatives being taken to enhance tourism in the region.
 - Listen to and document resident feedback on these initiatives, as well as their ideas or concerns.
- Develop multiple communication channels, such as a dedicated email address, to continue to solicit input from the local community and to share updates and developments.
- Conduct a recurring local or regional resident-sentiment survey, similar to the Visit California annual syndicated study, [Resident Sentiment on Travel and Tourism](#), to track progress, or regression, over time regarding the health of the relationship between the local community, visitors and the tourism industry.



Birba Restaurant

Conclusion

The statewide opportunities identified in this plan highlight critical dynamics that are already impacting many facets of California’s tourism industry. These included destination stewardship, economic development, affordable housing, workforce development, and transportation infrastructure.

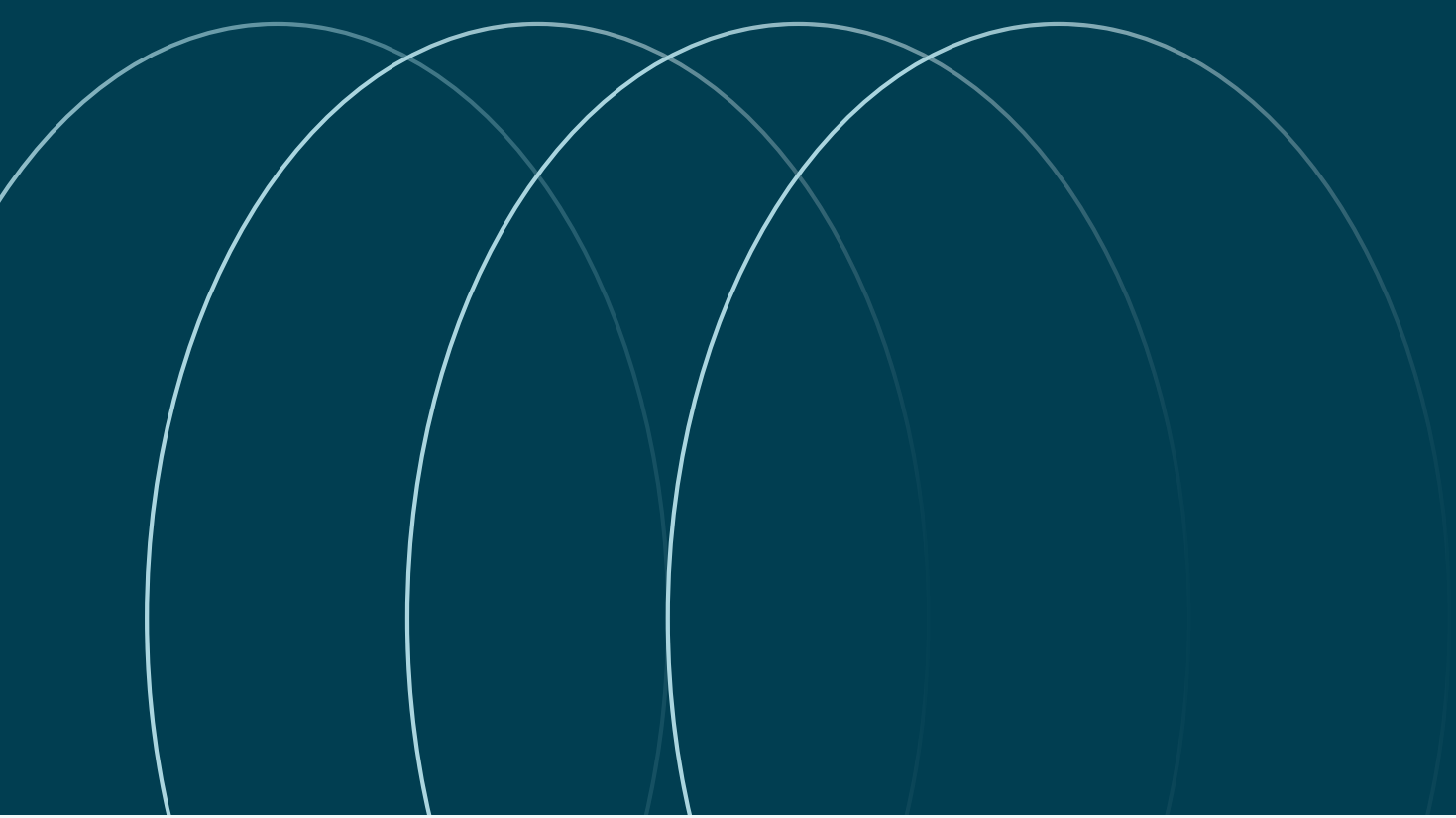
As this process moves forward, it will be important to stay focused on these issues. The future of California’s tourism industry depends on our ability to address these opportunities proactively and collaboratively.

Importantly, the collaborative process that led to this plan has also revealed numerous examples of current activities delivering impressive results across the state. These success stories demonstrate the industry’s capacity for innovation and adaptation, providing valuable models for future initiatives.


While there are opportunities for broader engagement, the project team has constantly been encouraged by the spirit of willingness and interest in ongoing and future collaboration expressed by stakeholders at all levels throughout this process. This enthusiasm for continued dialogue and action demonstrates the industry’s commitment to addressing these critical issues collectively.

This plan is not an endpoint, but rather a starting point for ongoing action. Continuous engagement, data-driven decision-making, and adaptive strategies will be crucial to successfully implementing these initiatives and responding to the evolving needs of both visitors and residents.

It will be helpful for this collaborative spirit and commitment to ongoing dialogue and action to remain. This can ensure that California not only remains a world-class destination but also extend the benefit for our residents while preserving its natural and cultural heritage for generations to come. The path ahead requires everyone’s commitment and collective effort to navigate these critical dynamics and shape a thriving future for California’s tourism industry.





 **JLL** SEE A BRIGHTER WAY