

Proposal

Request for Proposals No. EDD-2025-01 Professional Consulting Services for County Wide Travel and Tourism Marketing Strategy

County Administrative Office – Economic Development Division

Dianna Rios, Economic Development Coordinator
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Submitted by: The Research Associates

Contact Information:	Sung Lee, CEO 165 Broadway, Suite 2301 New York, NY 10006 Tel: (212) 868-5178 Email: swlee@TheResearch.com
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1. INTRODUCTORY LETTER

We would like to thank the County Administrative Office – Economic Development Division (County) for this exciting opportunity. The Research Associates (TRA) is one of the leaders in tourism analysis and strategy consulting services. Since its inception in 2000, TRA consultants have been engaged in many different tourism/city/state/country projects, including Disneyland, Universal Studios Hollywood, Santa Cruz (CA), the City of New York, the County of New York, the County of Connecticut, the County of South Carolina, the County of Arizona, US International Trade Administration, US Census Bureau, Las Vegas, and Myrtle Beach to name a few.

Our experience within the industry has allowed us to optimize our methodology for collecting, monitoring, analyzing, and reporting economic opportunity and tourism-related variables in California that would be of keen interest to the County.

TRA specializes in converting key tourism data into **actionable strategies**. Too often, many firms produce generic plans that are not relevant, actionable, or meaningful. Sung Lee, a former Senior Destination Strategist at Walt Disney Parks and Resorts, founded TRA specifically to provide strategic and actionable recommendations.

Recently, TRA was awarded by INC magazine as one of the top 500 Companies in the USA.

TRA will be able to provide the most innovative tourism research and consulting services to the County for the following reasons:

- We developed tourism development tools and strategies for leading destinations.
 - We have one of the most sophisticated tourism strategy tools.
 - Our size and select client base of prestigious companies and organizations allow us to be extremely responsive.
 - As a boutique firm with low overhead, TRA provides services cost-efficiently and with flexibility in pricing.
 - TRA values the relationships it builds with its clients through constant client communication, regular client visits, and client involvement in every project phase.
- TRA will provide a high level of personal service to the County.

Sincerely,

Team TRA

2. SIGNATURE AFFIDAVIT

Request for Proposals No. EDD-2025-01
Professional Consulting Services for County Wide
Travel and Tourism Marketing Strategy & Tourism Assets Study


ATTACHMENT A – SIGNATURE AFFIDAVIT
(Submit with Proposal)

Request for Proposals No. EDD-2025-01 SIGNATURE AFFIDAVIT	
NAME OF ORGANIZATION/AGENCY:	The Research Associates
STREET ADDRESS:	165 Broadway, Suite 2301
CITY, STATE, ZIP	New York, NY 10006
CONTACT PERSON:	Sung Lee
PHONE #:	212-868-5178
FAX #:	212-338-4077
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Government Code Sections 6250, *et seq.*, the “Public Records Act,” define a public record as any writing containing information relating to the conduct of public business. The Public Records Act provides that public records shall be disclosed upon written request, and that any citizen has a right to inspect any public record, unless the document is exempted from disclosure.

In signing this Proposal, I certify that this firm has not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or agency to submit or not to submit a Proposal; that this Proposal has been independently arrived at without collusion with any other Proposer, competitor or potential competitor; that this Proposal has not been knowingly disclosed prior to the opening of Proposals to any other Proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned is an authorized representative of the above-named agency and hereby agrees to all the terms, conditions and specifications required by the County in Request for Proposals No. 001-2021-0365 and declares that the attached Proposal and pricing are in conformity therewith.

	1/22/25
Signature	Date
Sung Lee, CEO	1/22/25
Name	Date

This agency hereby acknowledges receipt / review of the following Addendum(s), if any
Addendum # [] Addendum # [] Addendum # [] Addendum # []

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4. PROFESSIONAL PROFILE

COMPANY OVERVIEW

TRA is a tourism-focused marketing strategy consulting firm based in New York, NY.

Since its inception in 2000, The Research Associates (TRA) consultants have provided management consulting and marketing planning services to numerous destination organizations (i.e., Disneyland, Walt Disney World, and Universal Studios Theme Parks). Our familiarity with this landscape and its unique objectives allow us to provide a more strategic and effective service. Specifically...

- We have developed proprietary destination strategic planning tools for leading tourism destinations.
- We have performed significant destination planning studies for the US International Trade Administration, GSA, South Korea, New York, and South Carolina.
- For the US Department of Commerce, we have mapped global industry ecosystems involving over 75 different countries.
- Our key differentiators and what we are known for are our ability to present complex data findings in a simple-to-understand and visually compelling manner and through clear and jargon-free written materials.

Our experience within the industry has allowed us to optimize our methodology for analyzing and presenting on:

- Destination Marketing Strategies
- Tourist Behavior and Motivation Reports
- Demographic and Economic Statistics
- Travel Trends
- Travel Data and Trends
- Feasibility Studies for Attractions and Events
- Benchmarking
- Destination Development Key Success Factors
- Brand and Product Optimization Management

Additional Information

Since its inception in 2000, TRA has not had any litigation regarding the provision of services equivalent to those set forth in this RFP that has been brought by or against TRA, including, without limitation, the nature and result of such litigation.

TRA has not had any fraud convictions related to the provision of services pursuant to the terms and conditions of public contracts.

TRA has not had any current or prior debarments, suspensions, or other ineligibility to participate in public contracts.

TRA has not had any violations of local, state, and/or federal regulatory requirements.

TRA does not have any controlling or financial interest in any organization. TRA is not owned or controlled by any other organizations.

PROJECT MANAGER AND KEY TEAM MEMBERS

Sung Lee (Project Director)

Dr. Steven Struhl (Analytics)

David Gechijian (Quantitative
Research)

Dr. Jeremy Savian (Qualitative
Research)

Dr. Tamara Altman (Program
Research)

Amy Lee (Program Management)

Sung Lee – Project Manager

Selected Expertise / Qualifications:

- Expertise in analyzing property/infrastructure assets and portfolios for hospitality and destination/state/local entities

Key Experience:

- Destination Development Strategy
- Transportation and Hospitality Product Optimization Modeling
- Economic Impact Study

Sung is the CEO of The Research Associates. He is considered one of the leading experts in tourism and economic development strategies. He is frequently invited to speak about tourism assessment and economic impact strategies. In the past few months, he has lectured about these topics in cities such as New York, Orlando, and Seoul. He has been advising his clients on tourism/destination product feasibilities, economic impact drivers, transportation and hospitality market scenarios, and stakeholder/customer insights.

Notable projects include the City of New York (sharing economy study and city park development planning), Universal Orlando (development planning), Loews Hotels/Resorts (product development), the County of New York (development and expansion of various properties), and destination and State benchmarking/analysis (New York, Orlando, Ski Resorts, Las Vegas and Colorado).

Education

Institution	Degree or Certification
Columbia Business School	M.B.A.
Carnegie Mellon University	BS, Engineering

David Gechijian

Selected Expertise / Qualifications:

- Expertise in advanced analytics including product simulations and ROI analysis for hospitality and transportation organizations

Key Experience:

- Data Collection Optimization
- Policy Research including Hospitality
- Market and Branding Research and Modeling

David has extensive experience in planning and conducting consumer research initiatives as well as performing advanced analytics. Recent transportation/hospitality-related research projects include Universal Parks and Resorts, Royal Caribbean Cruise, Hertz, and Walt Disney World Parks Resorts. His other notable clients include Sony, Comcast, University at Buffalo, University of South Carolina, Stony Brook University, United Medical and several private equity firms.

Relevant Experience:

- **Customer Segmentation:** Defined customer types based on product needs, behaviors and lifetime value, and recommended key product strategies by key customer types and spending level
- **Product Innovations:** Identified the latest and most innovative theme parks and resorts products and technologies based on client ROI
- **Industry/Market Expansion Assessment:** Defined characteristics of key transportation industry/market forces and described how players are positioned
- **Product Prioritization:** Prioritized products and markets based on lifetime value and product ROI

Education

Institution	Degree or Certification
M.I.T. Sloan School of Management	MBA
N.Y.U. Stern School of Business	BS, Accounting

Tamara Altman

Selected Expertise / Qualifications:

- Expertise in advanced analytics, including product simulations and ROI analysis for healthcare, hospitality and government organizations
- Over 25 Years

Key Experience:

- Policy Research & Market and Research and Modeling

Tamara Altman has over 25 years of research, evaluation, and writing experience in travel, academic, nonprofit, government, healthcare, and corporate organizations and has extensive experience carrying out quantitative and qualitative research projects. Tamara has consulted for numerous tourism and non-profit organizations, including Tooele County, the City of New York, UC Berkeley, Stanford University, Lucille Packard Children's Hospital, UCSF, the Neuropsychiatric Institute at UCLA, and the Pediatric Pain Program at the UCLA Hospital.

Most recently, Tamara held the position of Director of Product Innovation/Business Development at Alere Wellbeing, a company that focuses on creating phone and web-based behavior change programs. In this role, she assessed market needs and inspired a department of 25 staff members to innovate and develop new products and services aimed at training and evaluation with the field. Prior to this position, Tamara was Director of Research and Evaluation, where she lead the design and execution of evaluation plans, methodologies, quality assurance processes, analyses, and reports focused on outcomes of health behavior change programs. In this role, she managed a staff of highly trained program evaluators, statistical analysts, quality assurance specialists, and project managers.

Institution	Degree or Certification
UCLA	Ph.D. in Clinical Psychology
U.C. Berkeley	Psychology

Steven Struhl

Selected Expertise / Qualifications:

- Expertise in advanced analytics including complex economic simulations

Key Experience:

- Scenario planning
- Segmentation and big data mining

Dr. Struhl has more than 25 years of experience in consulting and research, specializing in providing effective, practical solutions based on statistical models of decision-making and behavior. Steven's experience includes running his own analytical consulting business, Converge Analytic. Before this, he served for 15 years as Senior Vice President, Senior Methodologist at Total Research (later Harris Interactive). In addition, he worked as head of analytics for the life sciences/pharmaceutical group. In this role, he was responsible for all analytical work for a group whose revenues reached \$60 million. He focused on strategy and analytics for pricing, product/service optimization, tourism research, patient and medical database analytics, and analysis of decision making, customer loyalty, and consumer motivations. His work also addresses understanding consumer groups and their motivations, optimizing service delivery and product configurations and finding the meaningful differences among products and services. Earlier experience includes working as Director of Market Research at SPSS, Inc.

He has written a book, *Market Segmentation: An Overview and Review*, as well as many articles on multivariate analysis, computer software, and psychology. He also frequently speaks at conferences and has given numerous seminars on pricing, choice modeling, market segmentation, and presenting data.

Education

Institution	Degree or Certification
University of Chicago	Doctorate in Psychology
Booth School at the University of Chicago	M.B.A.
Boston University	MA and BA degrees

QUALIFICATIONS AND EXPERIENCE

Project Objectives	Notable Destination and Government Projects and Clients
Strategic Marketing Planning	<ul style="list-style-type: none"> - Walt Disney World - Universal Orlando Resort - Universal Studios Hollywood - Belmont Park - City of New York – Parks and Recreation
Benchmarking Studies	<ul style="list-style-type: none"> - Walt Disney World - Universal Orlando Resort - Universal Studios Hollywood - City of New York - State of Connecticut - State of South Carolina - State of Missouri
Assessment & Definition of Tourism Market Perception	<ul style="list-style-type: none"> - Walt Disney World - Universal Orlando Resort - Universal Studios Hollywood - City of New York - State of New York - State of South Carolina - US International Trade Administration
Travel Trends and Emerging Models	<ul style="list-style-type: none"> - Royal Caribbean Cruise - AirBNB - eFHV (Uber and Lyft)

TOURISM EXPERIENCE

UNIVERSAL STUDIOS PARKS AND RESORTS

We analyzed and evaluated Universal Parks and Resorts' economic impact as well as product and guest optimization strategies based on product and guest values. Our tasks included:

- Strategic planning development
 - o Universal Studios Hollywood
 - o Universal Studios Japan
 - o Universal Orlando Parks and Resorts
- SWOT Analysis
- Market and guest visitation (Optimization) scenarios
 - o Orlando and Florida
 - o Metro Los Angeles
 - o Domestic (Non-FL and Metro Los Angeles)
 - o International
- Demand and investment scenarios
- Impact on economy
 - o State of Florida
 - o State of California
 - o Japan/Osaka Region
 - o China/Beijing Region
- Market potential of guest segments
 - o Geography
 - o Demographics
- Product and guest visitation simulations
 - o Portfolio
 - o Product types
- Resort guest profiles and analytics
- New hotel/resort demand research

WALT DISNEY WORLD STRATEGIC PLANNING AND RESEARCH

TRA's CEO performed various strategic planning and research efforts for the Walt Disney World Resort as an employee and a consultant. Notable projects include:

- Strategic Planning and Directions for Walt Disney World
 - Walt Disney World 5-Year Plans
 - Under-penetrated Marketing Plans
- Walt Disney World's Economic Impact
 - Central Florida
 - Florida
- Walt Disney World Guest Profiling
 - Walt Disney World Guest Attitudes and Perceptions
 - Walt Disney World Guest Geographical Research and Analysis
 - Walt Disney World Guest Segmentation based on Demographics and Psychographics
 - Walt Disney World Guest Price Sensitivity Analysis
 - New Attractions and Resorts' Impact on Guest Visitation and Satisfaction
- Walt Disney World Key Visitation Metrics Development, Monitoring and Analysis
 - Key Guest Visitation Factors and Metrics
 - Optimal Visitation Performance Scenario Given the Capacity and Revenue
- Walt Disney World Visitation by Parks
 - Visitation Data Tabulation and Analysis by Each Park
 - Visitation Forecast by Theme Park
- Walt Disney World Marketing Media Mix and Effectiveness
 - By each key region
 - By each strategic guest segment
- Walt Disney World New Guest Segmentation
 - Segments
 - Attendance and VPG by demographic segments
 - Lifetime value of segments
 - Vacation planning cycle
 - Planning behavior by segments

BELMONT PARK AND NEW YORK RACING ASSOCIATION (NYRA)

Situation: NYRA (a NYS organization) has obtained The Research Associates to develop product development study to expand its product offerings and customer base.

Service Modules: TRA conducted primary market research with potential and current customers and developed **product and business strategies** that led to changes in product offerings and customer perceptions. TRA worked closely with NYRA's key executives, including its CEO/President.

Results: NYRA has recently initiated our key recommendations including:

- New York Islanders
- Value retail concepts
- Entertainment venues
- 300-room resort
- Convention center
- New train station

ROYAL CARIBBEAN CRUISE LINE (RCCL)

TRA identified a series of strategic pilot initiatives that RCCL could employ to differentiate its service offering from other cruise lines by working, planning, and conducting primary and secondary research initiatives to identify new trends, uses of technology, and “wow factors” in other competitive destinations around the world including major gaming destinations like Las Vegas

5. QUALITY ASSURANCE CAPABILITIES – DESCRIPTION OF SERVICES

PROJECT KICK-OFF AND RELATED SERVICES.

TRA will meet with the County representatives in person. The purpose of this meeting is to clarify objectives and to discuss how TRA will address those objectives.

- **Project Overview and Initial Guide.** The purpose/procedure/goals of the project and what we are trying to achieve.
- **Project Expectations and Desired Outcome.** We will formulate our project based on project expectations and desired outcomes.
- **Project Scope and Schedule.** TRA will define the deliverables created by this project and explain what the tasks, deliverables, and work approach will look like.

RESEARCH REVIEW AND INTERVIEWS

We will review the existing research data to understand the current situation and form hypotheses better. Key sources may include:

- Visitor Profiles
- Tourism Economics
- US Travel
- US Department of Commerce Data

Additional Data Audit and Review

In addition to the reports analyzed above, TRA will review and examine additional information available for this project, including but not limited to any previous project deliverables and research.

- Review and examine all existing plans and research data.
- Assess the relevance, timeliness, and comprehensiveness of existing data.
- Analyze the current research data gaps.
- Investigate the availability of secondary research not available.
- Secure any secondary research material such as databases, periodicals, research reports, etc.,
- Draft a secondary research summary report that provides an overview of findings.

Document any gaps in key data and/or other research needs.

TOURISM ASSETS AND LANDSCAPE ANALYSIS AND SCAN

Initial Scan

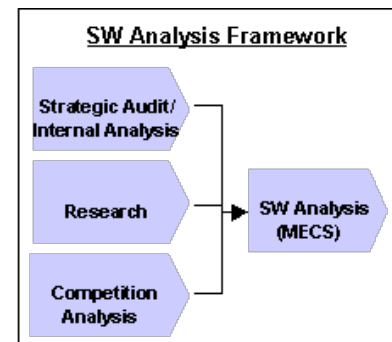
We will identify and review tourism assets and landscapes such as:

- Key Attractions/Assets/Facilities
- Key Players and Associations
- Major Hospitality Organizations/Companies
- Support Organizations
 - Competitors/Peers - Industry Best Practices

Strengths (and Weaknesses) of Tourism Assets

MECS™ is TRA's proprietary methodology used to assess the SWOT factors.

- Product
 - Characteristics
 - Differentiation
 - Segmentation
 - Focus
- Economic position
 - Capacity utilization
 - Economic development
 - Cost structure
 - New competitive threats
- Customer Characteristics
 - Size and market share
 - Loyalty
 - Growth
 - Needs and behaviors
 - Demographics
- Strategy
 - Strategic goals and plans
 - Positioning
 - Internal process and system

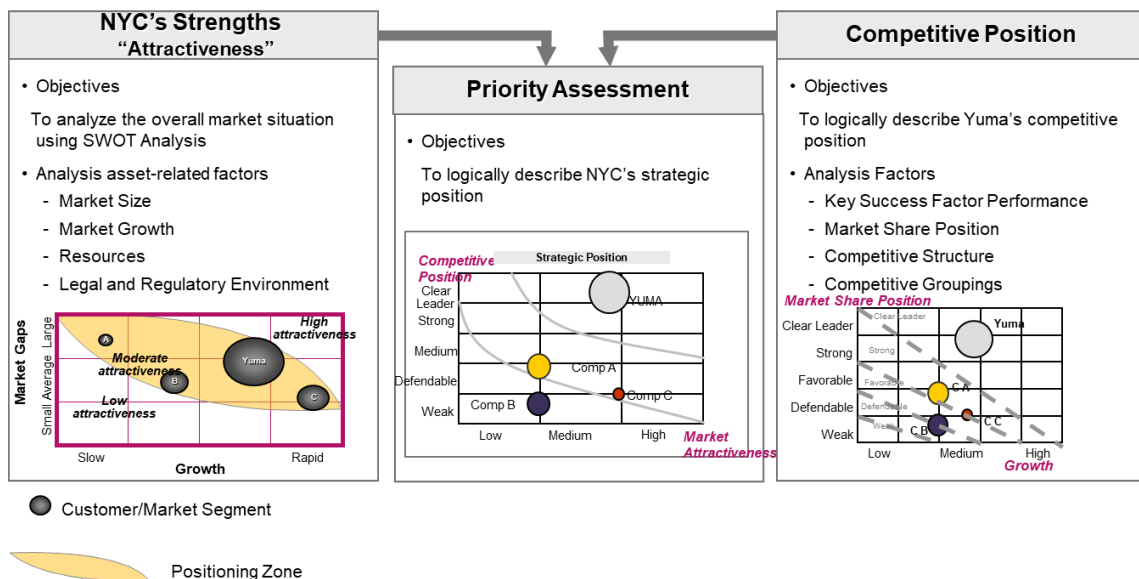


Area Identification

TRA will perform an “Area/Market Assessment,” including Asset (SWOT) Analysis and Competitor Positioning Analysis. In essence, TRA will develop insights to enable the County to select the right industry sectors and deliver the right insights and directions.

For each key industry, we will examine:

- Strengths:
 - o Size, Market Structure, Resources, Growth, and Environment
- Competitor Dynamics:
 - o Key success factor performance vs. competitors
 - o Market share vs. competitors
 - o Industry structure
 - o Industry groupings
- Priority Assessment Examples (from prior project examples - NYC)
 - o *We identified differentiated assets and key drivers by analyzing 1) NYC’s strengths and 2) NYC’s competitive position.*



Sustainable/Social-Driver Based Tourism

We will evaluate the key issues and effects of social and environmental issues/benefits, well-being/health, financial stability, and sustainable growth.

For each program/sector, we will explore (but not limited to):

Economic Benefits

- Economic activities, including revenues, job creation, employment income, non-job-related expenditures, etc.
- The potential for economic improvement or development, including resources (labor, investment, and technology), in-direct employment opportunities, recruiting, inequality, infrastructure needs, availability of credit/loan, development possibilities, etc.
- The constraints or problems companies/organizations may face.

Key Economic and Social Drivers

TRA has devised a proprietary stakeholder profile system that can be used to segment key industry groups and identify key drivers. Once the team defines and understands vital groups, we will seek to identify which critical socio-economic factors, directly and indirectly, drive the overall (economic and social) value. For example, the chart below illustrates how we may identify the key industry's benefits/impact in terms of 1) critical economic drivers, 2) key social drivers, and 3) barriers.

Example: Tourism Sector A

	Correlation Coefficient
Economic Drivers:	
Jobs	0.2911
Financial Stability	0.2680
Hospitality Industry	0.2385
Social Drivers:	
Well-being	0.1380
Diversity	0.1293
Barriers:	
Social Equity	0.2275

TOURISM PROGRAM PRIORITY AND POLICY EXAMINATION

TRA will use the research and analysis information to develop a series of strategic partnership program options and a Strategy Map that the County can use to fulfill its purpose.

TRA will evaluate the appropriateness of various strategic program options by performing the following:

- Define/review strategic objectives
- Review external factors such as research and analysis
- Create multiple strategic options
- Evaluate each action item based on: "Overall Potential Impact," "Immediacy of Impact," "Size of Markets," and "Investment and Programming Required for Market Penetration and Conversion."

Criteria	Program Option 1	Program Option 2	Program Option 3	Program Option 4
Potential Impact - ROI	5	5	4	3
Immediacy of Impact	4	3	3	3
Market Size	4	4	3	4
Resource Requirements	4	3	3	3
Total Score	17	15	13	13

- Pick the right combination of action items based on 4 criteria (left)

- Pick the right combination of action items based on the criteria above. Please note that we may also explore issues such as:
 - Is the strategic option meeting our strategic objective?
 - Is the strategic option aligned with stakeholder needs and taking advantage of the current landscape?
 - Is the strategic option aligned with strategic positioning?
 - Does the strategic option reflect key success factors?
- Design a timeline, detailed budget, staffing plans, an organizational structure, information, and knowledge implementation plan.
 - "Develop a suite of potential strategies"
 - "Evaluate outcomes and risks associated with strategy"
 - "Estimated costs to city to implement and manage strategy"
 - "Evaluate who is best to implement the strategy"

STAKEHOLDER ENGAGEMENT

For this phase, TRA will gather the information that will enable us to develop an optimal plan for conducting strategic planning initiatives that will allow us to deliver an actionable plan. To fully understand the County's goals and objectives, TRA will conduct stakeholder engagement programs that will include the following activities:

Stakeholder Segments

- County members
- Individuals and staff
- Partner organizations, including the Tourism Coalition and Tourism Development Board
- Local and regional elected officials

Topics to Explore

- Interview key stakeholders (perspective on existing conditions and stakeholders' suggestions on moving forward)
- Identify key assets and strengths.
- Identify roles and responsibilities within Humboldt County's tourism industry.
- Review any existing research data and previous strategic documents.
- Review key issues and concerns (SWOT) based on interviews and reviews.
 - o Strategic opportunities and strengths.
 - o Operational obstacles/risks and weaknesses
 - o Future expectations of primary customers/stakeholders
 - o Core internal operational services, processes, and activities to meet customers' / stakeholders' expectations.
 - o Opportunities based on industry strengths and weaknesses.
- Identify the issue/problem
 - o Critical issues facing various tourism products/events/assets
 - o Short-term and long-term goals

ACTIONABLE FRAMEWORK

TRA has developed economic (re)vitalization policy models for a variety of federal / state / local destination organizations. Our business support optimization model is built around the premise that *“all segments are unique.”* For the County, each stakeholder will likely have unique needs, behaviors, and different responses to various tactics and programs.

Step 1: Define the County of the County – insights from research and stakeholder engagement

To get to these insights, TRA will help the County define and understand where Humboldt County is and define key gaps against desired needs and drivers.

Step 2: Create Segment Profiles

TRA will begin to segment the tourism market and create “Segment Profiles” that will define the different types’ wants and characteristics (demographics and psychographics).

Step 3: Calculate Value

The next step is to calculate the “value” for the County by each key visitor/tourism segment. In making this calculation, it is essential to consider how other variables affect the value of each tourist segment. For example, we will consider how each segment may influence others.

Step 4: Optimize Key Segments / Strategic Programs

At this stage, we will identify “high lifetime value” segments for its strategic initiatives and develop **programs to fit the characteristics of the “typical” entity within the segment.**

Integrated Metrics for Implementation

TRA will deliver and present “Integrated Performance Metrics” to the County based on our audit of the current situation and relevant information on its target businesses’ views and insights. In addition, TRA will enable the County to measure the right metrics and deliver the right programs and structures to tourism-related businesses. Specifically, we will explore the following related to the target segment profiles and barriers.

- Needs, Challenges, and Benefits
 - Financial Factors
 - Demand
 - Unmet Needs and Gaps
 - Other Factors Related to Implementation
- Key Drivers
 - We will identify key drivers for improvements for the County by applying our predictive index and key driver models. For instance, we will show what factors contribute to the increase (and decrease) in ROI and performance scores. Furthermore, we can predict what programs/factors/audiences generate higher lifetime value.
- Strategies to consider
 - What are the implications?
 - What are some potential action steps for the County?
 - What/who are potential partners?
 - Direct and in-direct driver analysis
 - Timeline / key tasks
- Implementation tasks (especially focusing on):
 - Demand
 - Unmet needs and gaps
 - Funding sources
 - Potential partners/synergy opportunities

MARKETING STRATEGY FRAMEWORK

Development of a Strategic Marketing Framework

TRA will deliver and present an “Integrated Diagnostics” to the County, which will include our audit of the current situation and strategies, information on effective targeting and segmentation of the audience, relevant information on our target audience’s behaviors and needs, and key insights for development the County’s marketing hierarchy at large.

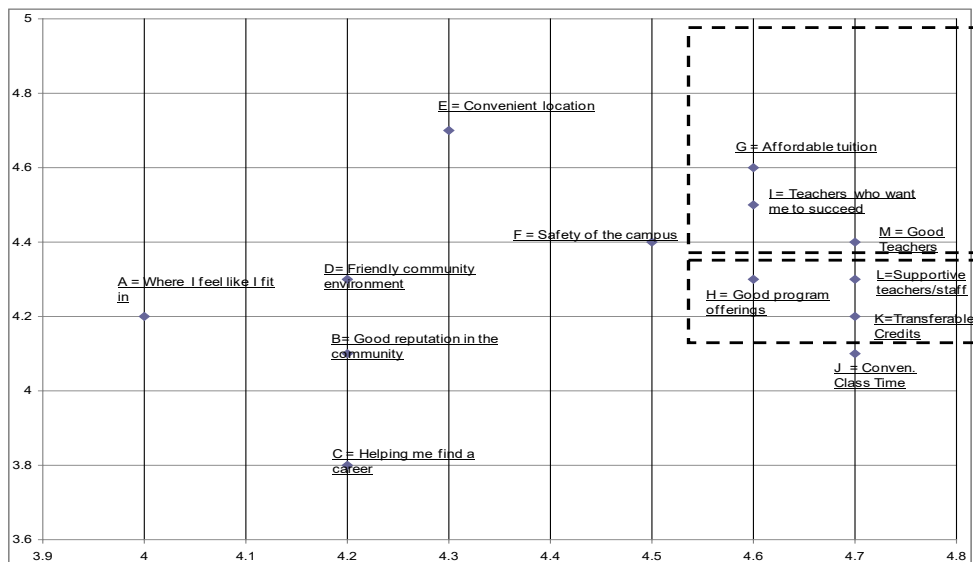
TRA will develop insights to enable the County to select the right target audiences and deliver the right branding disciplines. We will ensure consistent and integrated initiatives based on data and facilitate rapid, smooth execution within the County’s timeline.

Marketability Assessment

With our knowledge and experience within this category, we are uniquely positioned to assess the County’s current research and strategy resources and processes, identify key gaps, and suggest ways to strategically improve the County’s marketing efforts.

Mapping Example

The exhibits below illustrate qualified target market/segment positioning mapping. TRA will identify key market/audience segments for the County-based competitive position and market/audience attractiveness.



Once the attributes are defined, the County marketing team and TRA will take the following steps to differentiate the County umbrella brand and any identified sub-segments (i.e., students, alumni, etc.) by implementing a “competitive brand/positioning” methodology.

- Identify a relevant set of competitive product attributes that define the umbrella brand and the sub-segments based on the audiences.
- Utilize research data from a sample of audiences about perceptions of each brand on key attributes.
- Review and analyze the intensity of a product/brand’s current position in audiences’ minds.
- Determine each product/brand’s current positioning based on the audience landscape.

Key Drivers for Improvements

We will identify key drivers for improvements for the County by applying our predictive index and key driver models. For instance, we will be able to show what factors are contributing to the increase (and decrease) in perception and image scores. Furthermore, we will be able to predict what programs/factors/audiences generate higher lifetime value for the County.

Development of Creative Concepts

Strategic Messaging – Why is this crucial?

TRA will deliver and present an Integrated Strategic messaging-based Tagline to the County, which will include our audit of the current situation and strategies, information on effective targeting and segmentation of the audience, relevant information on our target audience's behaviors and needs, and key recommendations for changes in the direction of the messaging at large.

Designing and implementing a tagline messaging plan is crucial to selecting target stakeholders and delivering the right messages. We will ensure consistent and integrated communication initiatives based on an overall messaging strategy and facilitate rapid, smooth execution within the County's timeline.

In addition, it is important to ensure that all communications show consistency with the tagline essence and message. TRA's creative teams will begin exploring all points of creative expression, and TRA will create a comprehensive campaign to support the County's messaging initiatives.

We will focus on the following:

- Vision: What are we trying to be? What is "the reason for being?"
- Values/Mission: Brand values are the core values represented by a brand.

These build an emotional connection with the general public and influence how stakeholders perceive and interact with the County:

- Brand Essence/Attributes: What are the key elements that make up the County brand?
- What attributes could we use in our communications?
- Brand Voice: What is our tone and manner?
- Positioning: Once we define the key strategic customers, we will develop "differentiated" positioning based on "what our target audience wants us to say about us."

Positioning and Theme

Key Steps:

Once we define the key strategic stakeholders, we will develop “differentiated” positioning for the County brand:

- Identify a relevant set of competitive brand attributes that define the “product space” in which positions of current offerings are located
- Utilize research from a sample of audiences and potential audiences about perceptions of each brand on key attributes
- Review and analyze the intensity of a brand’s current position in audiences’ minds
- Determine the County brand’s current positioning based on the competitive landscape
- Determine audiences’ most preferred combination of key attributes
- Examine the fit between the attributes of key/strategic audience segments and the current competitive positioning
- Select brand/messaging positioning/theme

Positioning - Vision

TRA will ensure consistent and integrated initiatives based on an overall strategy and facilitate rapid, smooth execution within the County’s timeline. By emphasizing the County’s unique roles and responsibilities within Humboldt County’s tourism industry, TRA will create comprehensive strategy elements to support the County initiatives by focusing on:

- Values/Mission: “Why do we exist?”
- Vision: “What are we trying to be? What is “the reason for being?”
- Positioning Statement: “How are we different?”

Once we define the key strategic customers, we will develop a “differentiated” positioning based on “what our target audience wants us to say about us.”

REPORT AND SHARED-INFORMATION

TRA will deliver and present an “Integrated Diagnostics,” including our audit of the current situation and relevant information on our target audience’s performances and needs and key insights.

TRA will develop insights that will enable the County to select and deliver the right programs and disciplines. We will ensure consistent and integrated initiatives based on data and facilitate rapid, smooth execution within the County’s timeline.

Results from the data collection and analysis are communicated in a clear and concise manner.

QUALITY ASSURANCE CAPABILITIES

As mentioned previously, our experience within the industry has allowed us to optimize our methodology for collecting, monitoring, analyzing, and reporting economic opportunity and tourism-related variables that would be of keen interest to the County.

TRA will be able to provide the most innovative tourism research and consulting services to the County for the following reasons:

- We developed tourism development tools and strategies for leading destinations.
- We have one of the most sophisticated tourism strategy tools.
- Our size and select client base of prestigious companies and organizations allow us to be extremely responsive.
- As a boutique firm with low overhead, TRA provides services cost-efficiently and with flexibility in pricing.
- TRA values the relationships it builds with its clients through constant client communication, regular client visits, and client involvement in every project phase. TRA will provide a high level of personal service to the County.

TRA specializes in converting key tourism data into **actionable strategies**. Too often, many firms produce generic plans that are not relevant, actionable, or meaningful. Sung Lee, a former Senior Destination Strategist at Walt Disney Parks and Resorts, founded TRA specifically to provide strategic and actionable recommendations.

Capacity and Project Management

TRA will assign highly qualified and experienced research personnel to each task. Our organization will allow for efficiency, flexibility, and adaptability. Our goal is to provide the right staffing for the right tasks at the right time. The team's resource allocation processes underpin our capacity to meet program and reporting task schedules, whether they occur as a single task or multiple concurrent tasks. TRA can organize quickly and bring ample resources to bear in fulfilling requirements.

Our CEO (and the project manager) will assign personnel, allocate resources, and monitor program timelines and milestones to ensure efficient and effective completion of tasks associated with specific task orders. The program execution begins with a consultation between Mr. Lee and designated personnel, who will thoroughly analyze requirements and coordinate program-dependent resource allocation. Mr. Lee will develop a project plan by assigning the appropriate team member for each specific task to ensure that an optimal mix of strategy and marketing expertise is provided to the program.

Quality Assurance

The Research Associates uses **Market Research Six Sigma** (our proprietary internal review procedures) to sustain a high-quality standard in our organization and projects as well as achieve productivity enhancement and cost reductions. In addition, we enforce Marketing Six Sigma to sub-contractors, which we use for our clients' highest quality project outcomes.

1. Project Implementation

- We manage projects by applying key quality control components via tools such as process mapping and Gantt chart in order to:
 - Continuously implement project purpose
 - Maintain focus
 - Manage tasks and sub-tasks
 - Manage project team members
 - Manage time and \$
- We manage and implement project quality by:
 - Schedule management is the responsibility of not only the leaders but also the team members. Plans and tasks in progress should be co-owned
 - Responding swiftly to delays/allocation of resources, removal of obstacles and delays
 - Remembering the time constraints and limited resources, as well as to stay focused
 - Applying new learning in the next phase

2. Project Monitoring and Improvement

- Project Monitoring and Tracking System
 - o Capture actual data vs. planned data
 - o Analyze the disparity between the actual vs. plan to understand the cause behind the gap
 - o Recommend ways to narrow/remove the gap
- Post Project Review System
 - o Capture actual project results
 - o Identify successes and failures
 - o Celebrate successes
 - o Study failures
 - o Define key success metrics and factors
 - o Recommend subsequent project(s) based on learning gained from the project to IMPROVE the organization's performances

6. COST PROPOSAL

Total Cost: \$50,000.

ATTACHMENT B – COST PROPOSAL FORM

A. Personnel Costs	
Title: CEO Salary Calculation: Duties Description: Project Management	\$228.00 / hour
Title: Director of Analytics Salary Calculation: Duties Description: Analytics Management	\$196.00 / hour
Title: Consultant Salary Calculation: Duties Description: Research and Analysis	\$0.00
Total Personnel Costs:	\$0.00
B. Operational Costs: Personnel costs reflect operational costs	
Title: Description:	\$0.00
Title: Description:	\$0.00
Total Operational Costs:	\$0.00
D. Transportation/Travel: We will follow the GSA rules and regulations	
Title: Description:	\$0.00
Total Transportation/Travel:	\$0.00
E. Other Costs	
Title: Description:	\$0.00
Total Other Costs:	\$0.00
Total :	\$0.00

7. SUPPLEMENTAL DOCUMENTATION

Not Applicable

8. REFERENCES

Company: Universal Studios Parks and Resorts

- **Name of Contact, Position/Title:** William Hayden, Chief Strategy Officer
- **Email:** Bill.Hayden@UniversalOrlando.com
- **Scope:** Various tourism strategic planning projects in the Metro Loas Angeles area from 2011 until the present

Company: Suffolk County, NY

- **Name of Contact, Position/Title:** Will O'Brien, Research Economist
- **Phone:** William.OBrien2@suffolkcountyny.gov
- **Scope:** Transportation and Travel Study

Company: Towson University

- **Name of Contact, Position/Title:** Timm Baldwin
- **Phone:** tbaldwin@towson.edu
- **Scope:** Stakeholder and Community Study

9. INSURANCE

TRA has all insurances required by the sample Professional Services Agreement.

10. EXCEPTIONS, OBJECTIONS AND REQUESTED CHANGES

Not applicable