Members of the public who wish to speak during the meeting must submit a “Request to Speak” form to the Board Secretary prior to the commencement of the public comments for each agenda item of interest. Comments by the public on matters not identified on the agenda, but within the subject matter jurisdiction of the Commission, will be heard only during the item designated as “Public Comment.” Public speaking will be limited to two minutes per speaker, unless the presiding officer grants some other amount of time before the commencement of the public comment.

Special Meeting
Wednesday, August 23, 2017
9:00 a.m.
Los Angeles Convention Center
1201 S. Figueroa Street, L.A., CA 90015
Executive Board Room

1. CALL TO ORDER / ROLL CALL

2. PUBLIC COMMENT

3. ACTION ITEMS:
   a. Approval of the Special meeting minutes from 0900 am July 26, 2017
   b. Approval of the Special meeting minutes from 1030 am July 26, 2017

4. PRESENTATIONS:
   a. Neighborhood Council representatives on any Neighborhood Council Resolution or Community Impact Statement filed with the City Clerk which relate to any agenda item listed or being considered on this agenda for Board of Los Angeles Department of Convention and Tourism Development
   b. JLL Hotel Study – Tony Peterman, JLL
   c. Executive Director Report

ADJOURNMENT

AGENDA FORECAST / SPECIAL TOPICS:

   September 6, 2017 - AEG Monthly Update – July – AEG
   - LATCB Monthly Update – July – LATCB
   - CIP Update – Tom Fields, CTD

Materials related to an item on this agenda submitted to the Board of Los Angeles Convention and Tourism development after distribution of the agenda packet are available for public inspection in the Executive Office of the Los Angeles Convention Center, 1201 S. Figueroa Street, Los Angeles, CA 90015, during normal business hours.

As a covered entity under Title II of the Americans with Disabilities Act, the City of Los Angeles does not discriminate on the basis of disability and, upon request, will provide reasonable accommodation to ensure equal access to its programs, services and activities.
The Board of Los Angeles Convention and Tourism Development Commission (Board) convened a special meeting on Wednesday, July 26, 2017 at 9:00 a.m. at the Los Angeles Convention Center (LACC), located at 1201 S. Figueroa Street, Los Angeles, CA 90015, in the Executive Board Room.

PRESENT:
President Jon F. Vein
Vice President Otto Padron
Commissioner Jeremy Bernard (arrived 9:05 a.m.)
Commissioner Stella T. Maloyan

ABSENT:
Vacant

PRESENTERS:
Brad Gessner, AEG
Keith Hilsgen, AEG
Tom Fields, CTD
Doane Liu, CTD
Darren Green, LATCB
Ernie Wooden, LATCB

Item 1. Call to Order / Roll Call
President Vein called the meeting to order at 9:00 a.m.

Item 2. Public Comment
None

Item 3a. FY 17-18 Election of Officers
Motion to elect Jon Vein as President and Otto Padron as Vice President.

Ayes: President Vein, Commissioners Bernard, Maloyan, and Padron
Nays: None
Absent: Vacant

UNANIMOUSLY APPROVED
**Item 3b. Approval of the regular meeting minutes from June 7, 2017**

UNANIMOUSLY APPROVED

**Item 4a. Neighborhood Council**

None

**Item 4b. AEG Monthly Update – May and June**

Mr. Brad Gessner recognized Brian Delostrinos as Employee of the Month, and Bladimir Reyes, Leader of the Quarter. Mr. Gessner reported that May had 6 events, with a total attendance of 132,114, four of which were citywide events and that there were 3 filmings. Mr. Gessner also noted that June had four events, with a total attendance of 151,560, three of which were citywide events and that there was one filming. Mr. Gessner announced that FY 16-17 was a record year with an operating profit of $10.2 million dollars. Mr. Hilsgen presented the financial data for May and June. Mr. Hilsgen also reported that occupancy for the year end occupancy was 74%, which is the highest in over 5 years and the year end Economic Interest was $732 million.

*President Vein would like to see indirect spend data included in the next presentation as well as the tax base figures if there was no Convention Center.*

**Item 4c. LATCB Monthly Update – Year End**

Mr. Darren Green reported that at year end, LATCB has processed 222 leads, the goal was 220 leads, resulting in 393,708 room nights which exceeded the goal of 390,000. Mr. Ernie Wooden added that Air BnB was voluntarily paying TOT Tax. Mr. Green also reported that 24 events were booked in FY 16-17 with 246,306 Room Nights. Mr. Green reported on the June Client Advisory Board Forum and showed a video highlighting the event. Mr. Wooden reported that last year Los Angeles had 47 million visitors which resulted in $22 billion spent and $32 billion in indirect spend. Mr. Wooden also reported that over the last six years, 39 conventions have been lost and $650 million due to the condition of the Convention Center and the lack of hotel room inventory dedicated to citywide events. Mr. Wooden stressed the need to futurization and expansion of the center and for additional hotel rooms.

**Item 4d. CIP Update**

Mr. Tom Fields provided an update on CIP projects and noted that the City and AEG have funded close to $40 million in both CIP and A&I projects over the last three years.
**Item 4e. Update on Expansion and Modernization**

Item will be addressed in closed session during the 10:30 am Special Meeting.

**Item 4f. Executive Director Report**

Mr. Doane Liu reported the CTD now reports to two City Council Committees: Trade, Travel, and Tourism (TTT) and Economic Development Committee (EDC). Mr. Liu introduced Dennis Glenson and Amy Gavart, representatives of Council District 15. Mr. Liu reported on his activities since the last Board meeting, which included meeting with E3 representatives to discuss future events, discussing with the Mayor’s office homelessness and how it affects clients and event attendees, meeting with CBRE to discuss downtown hotel activity, meeting with CD4 regarding concerns of tourism at the Hollywood sign. Mr. Liu also reported on his trip with City staff to meet with the International Olympic Committee and Sister Cities representatives and his discussions with AEG and Council offices regarding modernization and expansion.

**ADJOURNMENT**

The meeting was adjourned at 10:05 a.m.
The Board of Los Angeles Convention and Tourism Development Commission (Board) convened a special meeting on Wednesday, July 26, 2017 at 10:30 a.m. at the Los Angeles Convention Center (LACC), located at 1201 S. Figueroa Street, Los Angeles, CA 90015, in the Executive Board Room.

PRESENT:
President Jon F. Vein
Vice President Otto Padron
Commissioner Jeremy Bernard
Commissioner Stella T. Maloyan

ABSENT:
Vacant

Item 1. Call to Order / Roll Call
President Vein called the meeting to order at 10:20 a.m.

Item 2. Public Comment
None

Item 3a. Neighborhood Council
None

Item 3b. Pursuant to Government Code Section 54956.8, open and public session identifying negotiators, real property which negotiations may concern, and the person or persons with whom its negotiators may negotiate.

Mr. Doane Liu noted that the Board would be moving into closed session to discuss the Ground Lease for the Los Angeles Convention Center Potential Expansion Project, which would include the Board members, City Attorney, CTD Management and relative Board staff, and negotiator John Wickham.
Item 3c. The Commission may recess to closed session pursuant to Government Code Sections 54956.8, in order to confer with negotiator prior to the purchase, sale, exchange, or lease of real property by or for the local agency to grant authority to its negotiator regarding the price and terms of payment for the purchase, sale, exchange, or lease.

The Board recessed to closed session.

The Board reconvened from closed session with no action to report.

ADJOURNMENT

The meeting was adjourned at 11:04 a.m.
How has the LA Hotel Market evolved?

Can the LACC market support all the new planned supply?
  - How does the LACC expansion impact?

Is there potential for a new, large convention hotel? Hotels?
How has the LA market evolved?
6th largest hotel market in the US - over 100K hotel rooms in 1,015 hotels
Since 19050, LA hotel market grew 3.2% per year

*Full service defined as hotels with restaurant
Source: STR, JLL
LA hotel market grew slightly slower than US; more so in 1990’s

*Full service defined as hotels with restaurant
Source: STR, JLL
LA is set to exceed US average for the first time since 1992

*Includes hotels under construction and final planning
Source: STR, JLL
CBD market area has ~ 13,000 rooms and will see its largest room bump since 1977

LA CBD Hotel Market Openings & Supply

- Westin Bonaventure and Doubletree open with 1,782 rooms: +41% supply in market
- Ritz Carlton and JW Marriott open with 1,000 rooms: +10% supply in market
- Indigo, Intercontinental, Freehand and Figueroa open with 1,674 rooms: +15% supply in market

LACC opens

*Includes hotels under construction, final planning and planning
Source: STR, JLL
LACC market area includes 26 hotels with 8,400 rooms
LACC market area is at its peak

LACC Market Area Performance

Source: STR
Since 2010, total demand more than doubled the growth over 20 years ending 2007

LACC Market Area: Supply & Demand

- Pre-recession Peak
- LACC expansion
- Staples Center
- JW Marriott opens
- + 222,000 room nights
- + 545,000 room nights

CAGR:
- Demand: 0.8%
- Supply: 0.5%
- Demand: 3.7%
- Supply: 7.6%

Source: STR
Key Findings

- LA hotel market has been growing a little below the US average for the last 60 years

- Recent LACC market high performance - above 80% occupancy and healthy ADR growth
  - Much of 2016 saw LA as Top US performer

- Significant number of projects in various stages – potential of 5,200 new rooms to the market - 50% full service and 50% select service
  - No convention hotels planned - all projects below 500 rooms and limited to no meeting space
Can the LACC market support all the new supply?
5,200 hotel rooms in 18 projects that may enter the CC Hotel Market in the next years

- Intercontinental (890)
- Indigo (350)
- Freehand (167)
- Hotel Figueroa (268)
- Proper Hotel (151)
- NoMad Los Angeles (242)
- Dazzler Hotel Clark (347)
- Park Hyatt Los Angeles (184)
- Lizard In Los Angeles (176)
- W Los Angeles Downtown (300)
- Hoxton Hotel Los Angeles (180)
- Cambria James Wood Blvd (225)
- Lightstone Project (1,162)
- Staybridge Suites Los Angeles (100)
- Olympic Tower (373)
- Broadway Trade Center (200)
- Morrison Hotel (80)
- Equinox Hotel @ Grand Avenue (300)
- Cambria Spring St (180)
- JW Marriott expansion (755)
- Proposed Hotel (210)
Los Angeles
5,000 rooms

San Francisco
26,300 rooms

Anaheim
17,100 rooms

San Diego
11,900 rooms

Luxury
Upscale
Select & Other
Convention Center

1 Mile Radius of Center
What if it all happened?

Rooms within Walking Distance from the Convention Center (1 mile radius)
Including all Pipeline around the LACC

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<th>Convention Center</th>
<th>Attached or One Block</th>
<th>Two to Four Blocks</th>
<th>Five to Seven Blocks</th>
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Note:
- Los Angeles supply includes Existing Hotels and pipeline identified by JLL under construction, final planning and planning
- Scales as defined by STR
- Upscale includes both Upper Upscale and Upscale
- Select includes Upper Midscale, Midscale, Economy and Budget
Meeting Planner Feedback

“There is a need for hotels with different price points and brands.”

“The hotels need to be walking distance from the Convention Center – shuttles are a high cost and a large inconvenience.”

“The Convention Center needs one more HQ hotel.”

Source: LATCB; JLL
Scenarios and Assumptions

- **Scenario 1**
  - No LACC expansion
  - 70% of all planned supply – 3,500 rooms

- **Scenario 2**
  - LACC expansion
    - Decrease of 70,000 room nights during the construction in 2020 and 2021
    - Increase of 128,000 room night after the expansion
  - 70% of all planned supply – 3,500 rooms
Scenarios and Assumptions

**Scenario 3**
- LACC expansion
  - Decrease of 70,000 room nights during the construction in 2020/2021
  - Increase of 196,000 room night after the expansion
- 70% of all planned supply – 3,500 rooms
- 1,000 room convention hotel off-site in 2022

**Scenario 3b**
- LACC expansion
  - Decrease of 70,000 room nights during the construction in 2020/2021
  - Increase of 281,000 room night after the expansion
- 70% of all planned supply – 3,500 rooms
- 1,000 room convention hotel on-site in 2022
### Scenarios and Assumptions

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### Demand Growth Rate

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### Total Demand Growth

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## Scenarios and Assumptions

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### LACC Market Area RevPAR

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Conclusions

Over the projection period, LACC market area can support the 3,500 rooms that are likely to be developed.

A second 1,000-room convention hotel could also be supported in conjunction with the LACC expansion.

An on-site location provides greater economic impact for the City than an off-site hotel.
Other Considerations

The City’s historical use of incentives was successful; The LA hotel market is robust

If only half of the select service hotels planned in the LACC market area ultimately are developed, the market wide occupancy for the area increases 5.0 to 7.0 occupancy points

Going forward, smart use of public incentives can have a positive effect on total demand, market wide occupancy, ADRs, and LA’s destination appeal
Thank you