

Sustainable Recreation & Tourism

Building a Sustainable Tourism Economy

SECTOR DEFINITION

The Sustainable Tourism Industry Sector includes natural and cultural attractions, arts, outdoor activities, events, and historic sites. Sustainable tourism is focused on current and future economic, social, and environmental impacts and addresses the needs of visitors, the industry, the environment, and host communities. Data and feedback indicate the region's robust recreation and tourism sector is a critical economic driver. Leveraging the region's natural assets, arts, historic sites, and community events has significant potential for developing quality jobs.

SECTOR SNAPSHOT

Sustainable recreation and tourism dominate the regional economy and represent nearly 25% of all employment.

This industry sector is broad in scope and includes everything from accommodations and lodging to outdoor recreation, arts and cultural attractions, food service, and some retail operations.

The location quotient is 1.64, indicating that 64% more tourism jobs exist in the region than the employment average in California for this sector. The highest number of jobs exist in food service and accommodations for this sector, as listed on the next page. Jobs in these two industries tend to be low-wage jobs. This industry sector represents one of the most significant areas for wage improvement to achieve region-wide income goals, as many jobs in this sector today pay under \$50,000 annually.

Strategies in this sector will need to work to find creative ways to build opportunities for high-quality job growth in these specific industry areas.

OUTCOME STATEMENTS

- Sierra employees, especially those in the food service and accommodations, can access high-quality jobs in the recreation and tourism sector.
- Local, state, tribal, federal, and private landowners work together to unlock regional opportunities.
- Significant regional public and private investments support new opportunities and ongoing maintenance needs in the arts, history, and recreational opportunities.
- A climate-resilient, environmentally responsible recreation and tourism economy exists in the region.

BY THE NUMBERS

SECTOR LOCATION QUOTIENT

1.64

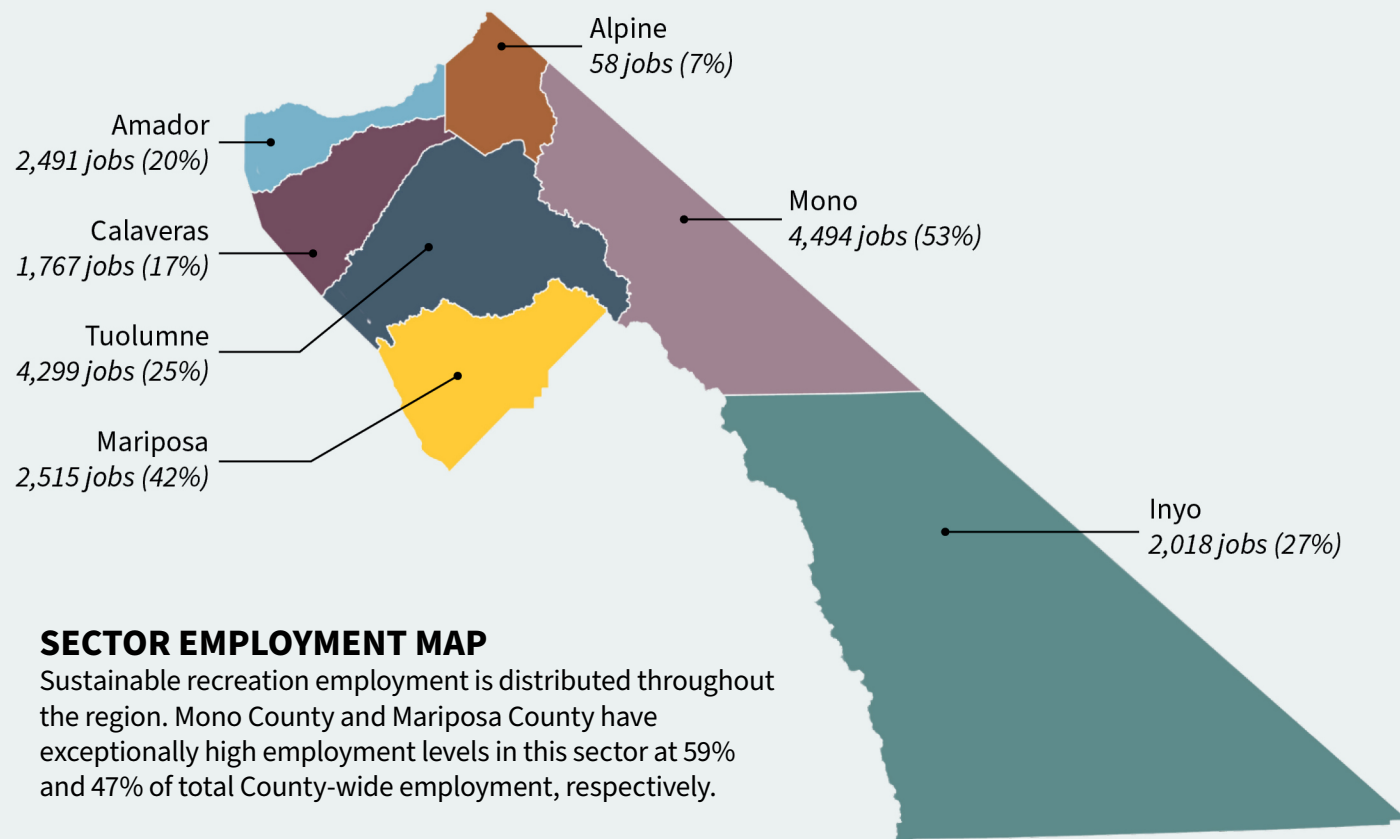
Sustainable recreation represents an area of economic specialization for the region, with an occupation rate 64% higher than statewide averages across this economic sector. With its high employment numbers, this is an important regional investment area.

TOTAL SECTOR EMPLOYMENT IN REGION 2023

17,642 jobs

28.1% of region employment

Regionally, about three of every 10 jobs fall within the sustainable recreation sector, indicating that these economies are heavily tied to the continuation and advancement of the local workforce.



SECTOR INDUSTRY LOCATION QUOTIENT AND EMPLOYMENT BY INDUSTRY

▼ The graph below shows regional employment numbers and location quotients for the five industries with the most employment. The LQ compares the concentration of an industry within a specific area, such as the Sierra, to the concentration of that industry in a larger geography, such as the State. These numbers help identify the specifics of the regional economy and provide essential data for strategy development and long-term investment. Food services and accommodations reflect the majority of current employment across this sector regionally.

INDUSTRY EMPLOYMENT AND LOCATION QUOTIENT SUSTAINABLE RECREATION AND TOURISM



SECTOR RATIONALE

VALUE CHAIN AND INFRASTRUCTURE

Investing in sustainable recreation and tourism can attract tourists, support new and existing business owners, infuse the local economy with revenue, and provide a climate-resilient path toward regional prosperity. Essential investments include sustainable lodging and transportation, renewable energy systems, waste management facilities, restrooms, safety infrastructure, and local conservation projects.

INNOVATION ECOSYSTEM

Through technology and innovation, the private and public sectors can work separately or collaborate to pursue economic development projects that improve the region's recreation activities and attractions. Some examples of innovations that could improve the sector and increase revenues include expanding sustainable transportation options or creating ways to adapt outdoor activities based on conditions such as snow or smoke conditions.

OCCUPATIONS AND WAGES

Specific occupations often do not fall into any specific industry sector, necessitating analysis around a sampling of occupations that primarily fall into this industry sector. This process highlighted the following key findings:

- Occupations in the Sustainable Recreation and Tourism sector show the most significant projected growth across the five sectors identified in this report, with a 26% projected increase across the region by 2030.
- While some higher-paying and higher-quality jobs exist in this employment sector, most occupations show median

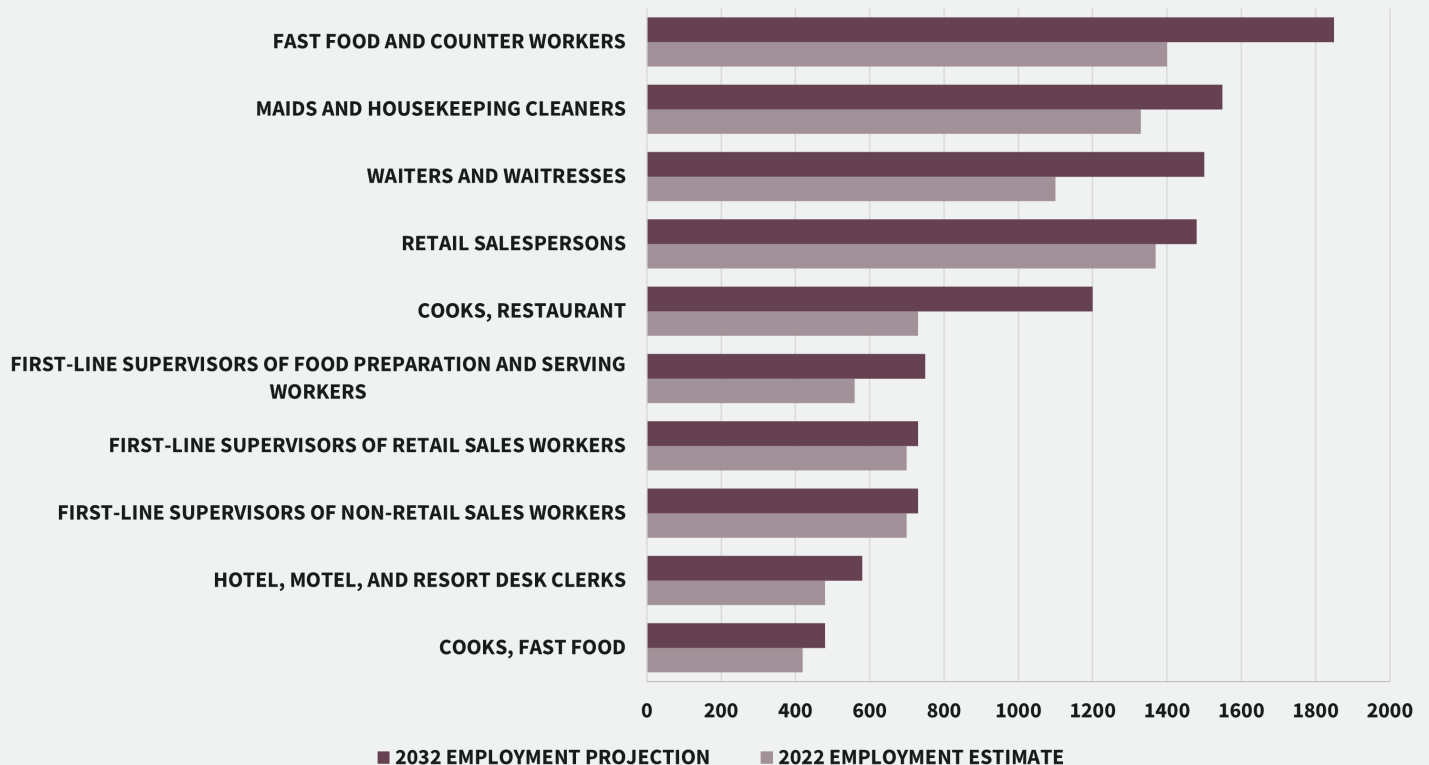
annual wages of under \$40,000, indicating a lack of quality jobs throughout this dominant sector.

➤ Occupation in this sector shows relatively little need for formal education and long-term work experience as a prerequisite to employment, indicating that jobs are more accessible in this industry sector.

➤ Short-term on-the-job training is expected in many occupations in this sector.

OCCUPATION ESTIMATES AND PROJECTIONS

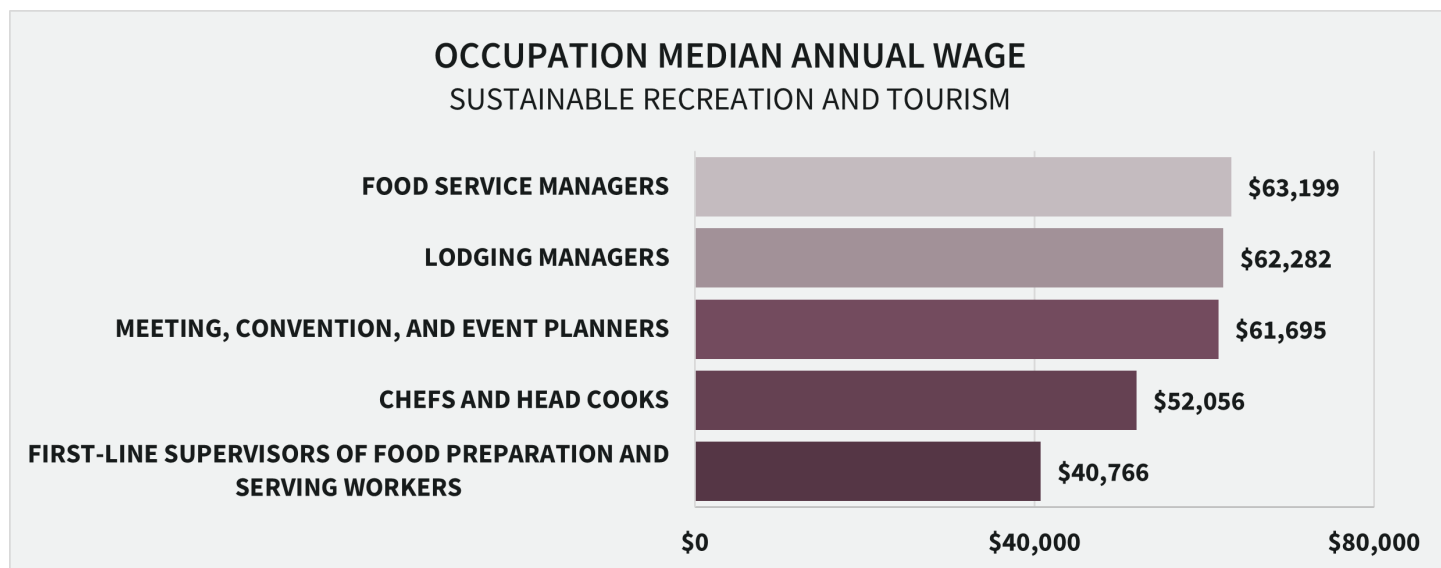
SUSTAINABLE RECREATION AND TOURISM



▲ The graph above shows the occupations projected to have the most employment by 2032 in the sector.

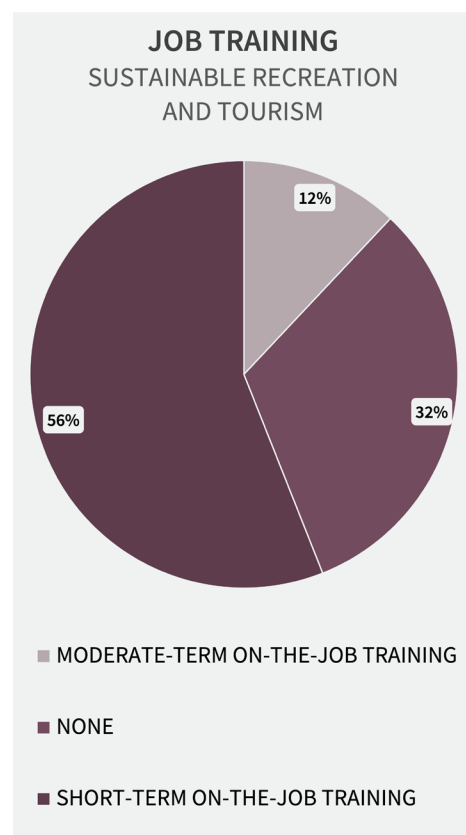
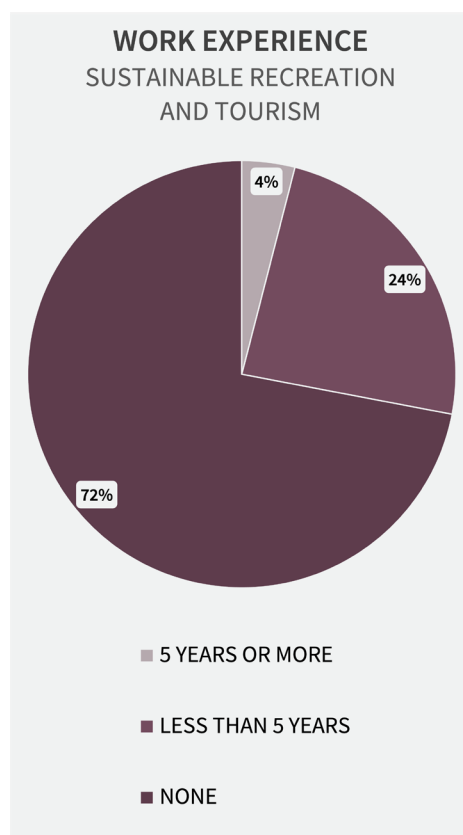
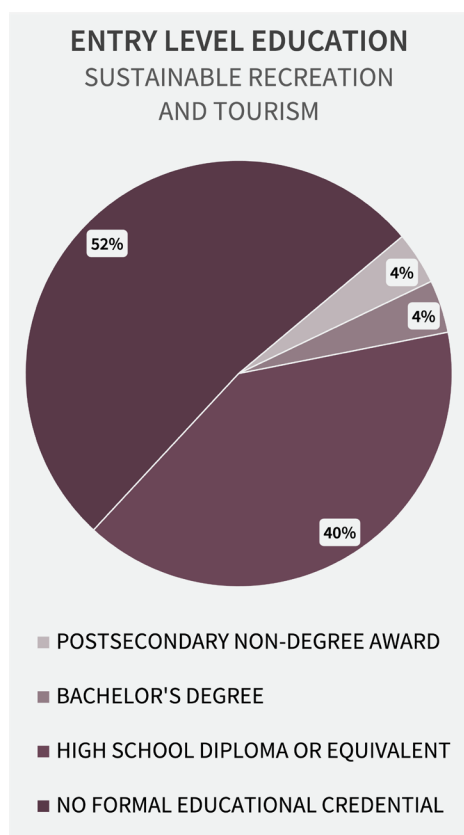
MEDIAN ANNUAL WAGE

▼ The graph below shows the top-earning occupations in the sustainable recreation and tourism sector based on median annual wage.



WORKFORCE DEVELOPMENT AND EDUCATION

▼ The three graphs below show what percentage of occupations connected to the sustainable recreation and tourism industry sector require specific levels of professional development or education.



REGIONAL ASSETS

The following resources will be leveraged to strengthen the development of the target sector. This is a partial list of the region's extensive recreation and tourism assets.

› **Natural Resources:** The national and State parks, forests, and recreation sites offer diverse ecosystems and scenic beauty, attracting millions of visitors annually. The varied climates support year-round tourism activities such as skiing, hiking, rock climbing, and more.

› **National Parks, Monuments, and Scenic Areas:** Yosemite, Death Valley, Devils Postpile, Manzanar, and Alabama Hills.

› **U.S. National Forests:** Inyo, Stanislaus, Sierra, Humboldt-Toiyabe, Eldorado, and Lake Tahoe Basin Management Unit.

› **State Historic Parks:** Bodie, Columbia, Indian Grinding Rock, Calaveras Big Trees, Railtown 1897, California State Mining and Mineral Museum, Mono Lake Tufa, and Grover Hot Springs.

› **Trails:** Pacific Crest National Scenic Trail, John Muir Trail, and countless others.

› **Attractions:** Ancient Bristlecone Pine Forest, Bishop rock-climbing destinations, Buttermilk Bouldering Area, hot springs, Mt. Whitney

› **Ski Areas:** Mammoth Mountain, June Mountain, Kirkwood Ski Area and Bear Valley.

› **Expertise:** Local experts specialize in hospitality, tourism management, outdoor recreation, and environmental conservation. Artisans and cultural practitioners contribute to artistic and cultural events.

› **Community Relationships/Connections:** The SJF region is not just a collection of individuals but a community with strong ties and established relationships among local businesses, tourism boards, and event organizers.

› **Infrastructure:** Developed infrastructure supports tourism and recreation, including transportation networks, lodging facilities, and recreational amenities.

› **Artistic and Cultural Events:** Opportunities for investment and expansion to enhance revenue and job creation within the region.

› **Annual Events (including but not limited to):** Alpine Club Craggin' Classic, Blake Jones Trout Derby, Calaveras County Fair, Death Ride, Jumping Frog Jubilee, Mammoth Bluesapalooza, Mammoth Gran Fondo, Millpond Music Festival, Mule Days, Tri-County Fair.



► Images to left from top to right. 1) Four hikers at Dantes View in Death Valley. Photo by John D Hallett 2) Climber ascends a rope early morning at Yosemite National Park in with Half Dome in the background. Photo by H. Kajitani

OPPORTUNITIES

The following is a start to a list of opportunities that can be built upon to increase quality jobs in the sustainable recreation and tourism sector.

- › **Attraction Promotion:** Successful promotions demonstrate the potential of focusing on wine, outdoor activities, and historical and artistic attractions.
- › **Collaborative Support:** Regional private/public partnerships provide sustainable support.
- › **Economic Impact:** The tourism and recreation industries are the largest private-sector employers and generate significant revenue.
- › **Event Expansion:** Well-established events and growing artistic, cultural, and sports-related activities can attract visitors and attention.

- › **Guided Projects:** Sustainable recreation projects guided by principles of ecosystem stewardship offer economic benefits.
- › **Historic Charm:** Historic downtowns and communities can be standalone tourist destinations.
- › **Marketing Effectiveness:** Tourism Marketing Districts can directly fund attraction efforts.
- › **Natural Beauty:** Surrounding national parks, national forests, and public lands offer abundant natural scenic beauty and access to open space.
- › **Sustainability Push:** Initiatives and plans focus on increasing access to outdoor activities and promoting economic development.
- › **Varied Visitors:** Millions of annual visitors to national and State parks, forests, ski resorts, and historic small towns.

CHALLENGES/RISKS

The below challenges have impacted quality job development in this sector.

- › **Climate Risks:** Extreme weather events and varying snow levels impact access and infrastructure, limiting visitation.
- › **Destination Marketing Capacity:** Limited funding for tourism marketing leads to inconsistent development of plans and strategies.
- › **Disconnection with the Arts:** Limited programs result in a need for more artists and prioritization of public art.
- › **Economic Diversification:** Over-reliance on outdoor recreation creates economic vulnerability, especially during seasonal fluctuations.
- › **Housing:** The growth of second homeowners and remote workers in a housing-constrained environment impacts the tourism workforce.

- › **Infrastructure and Environmental Impacts:** Unmanaged tourism leads to environmental degradation and damage to recreation facilities.
- › **Land Management Capacity:** Budget and capacity constraints, along with institutional resistance, limit the ability of federal agencies and public land managers to promote recreational initiatives.
- › **Land Tenure:** Most recreation destinations and activities are on public lands that local communities cannot control.
- › **Limited Accessibility:** Many trails and hiking opportunities are inaccessible to people of all abilities.
- › **Stagnant jobs:** Tourism and recreation industry jobs are primarily service-related, low-wage, or seasonal.

ALIGNMENT WITH STATE GOALS

The region must invest in sustainable infrastructure, develop tailored workforce training programs, and promote inclusive community engagement in the recreation and tourism sectors to build a resilient, inclusive, and environmentally sustainable recreation and tourism economy.

WORKFORCE DEVELOPMENT

Partnering with vocational programs, educational institutions, and businesses ensures that the region's training programs align with the skills needed for available jobs in tourism and recreation.

JOB QUALITY AND ACCESS

Creative approaches to bridging seasons, off-season training, and inclusive recruitment to creating new year-round, high-quality jobs can improve current employment opportunities, and support the region's workforce.

EQUITY

Year-round employment opportunities, workforce development and targeted outreach can improve equitable access to quality jobs, engage disinvested communities, and empower people to create stable livelihoods.

CLIMATE

Promoting existing responsible and sustainable tourism practices can limit economic development's impact on the natural environment and increase climate resilience.

Public Lands Partnership Agreements

Strategy 1: Enhance access to sustainable recreation and tourism on public lands to expand economic opportunities by creating partnership agreements between local authorities and federal, state, and utility land managers.

ACTION STEP 1

Develop a regional governance structure consistent with partnership agreements to regularly convene land managers and regional partners to identify recreation and tourism needs and opportunities and serve as a forum for information sharing.

- a. Identify potential members and recruit for founding collaborative.
- b. Set meetings, draft charter, goals, and priorities.

ACTION STEP 2

Through a regional collaborative governance structure consistent with partnership agreements, identify efficient pathways to create plans and establish policies to reflect regional priorities.

- a. Create regional sustainable recreation plans by identifying assets, gaps, partners, and implementation strategies with land managers.
- b. Prioritize tribal engagement.
- c. Attract and develop partnerships with recreation/entertainment/resort organizations, including the California Outdoor Recreation Partnership.
- d. Work with the film industry and local film commissioners/visitor bureaus.

ACTION STEP 3

Identify efficient pathways to implement regional plans and priorities through a regional collaborative governance structure consistent with partnership agreements.

- a. Establish agreements between land managers and the full suite of regional capacities in anticipation of implementation efforts.
- b. Identify implementation opportunities for recreation infrastructure and service gaps that will increase capacity through business expansion and job training in sustainable recreation, ecosystem services, and agritourism. This includes project planning and permitting and implementation of recreation infrastructure, including trails, restrooms, trash collection, campsites, permittees, outfitters, guides, etc.

ACTION STEP 4

Identify and leverage innovative financing structures to diversify revenue streams for project implementation consistent with partnership agreements to create local jobs in sustainable recreation.

- a. Monitor federal, tribal, state, and philanthropic funding resources for opportunities consistent with the partnership agreements to access capital and maintenance resources for the region's collaborative, sustainable outdoor recreation economy.
- b. Consider private investment in public lands where Transit Occupancy Tax is applicable—RV Parks, campgrounds, boating infrastructure, rentals, etc.
- c. Explore micro-loan programs for entrepreneurs and local businesses for projects that impact the local economy.

See Small Business and Entrepreneurship foundational element for more information.

Values-Based Tourism Promotion

Strategy 2: Promote sustainable tourism for the region's recreation economy based on the agreed-upon values of partners.

ACTION STEP 1

Develop visitor management plans, including regional branding and marketing. Work with regional destination marketing organizations (DMOs) and regional collaborative governance partners to develop visitor management, branding, and marketing strategies.

- a.** Perform regional gap analysis on needs to advance strategy and identify strengths to leverage and weaknesses to address.
- b.** Leverage TakeCareSierra.org's efforts for communications and education.
- c.** Work with regional DMOs and collaborative governance partners to develop and promote regional tourism, including establishing regional branding, tourism itineraries, and destination and event promotion.

ACTION STEP 2

Coordinate tourism with federal, tribal, state, and utility land managers and engage them in new partnerships that result in appropriate increases in visitations to attractions on their landscapes.

- a.** Leverage the region's current visibility as the state's premier mountain playground to expand experiential and cultural tourism opportunities consistent with current and future land manager policies.
- b.** Working with land managers, develop a Winter Recreation Needs Assessment for the entire region that supports growth, conflict resolution, and visitor returns for resort skiing, backcountry skiing, snowmobiling, and snow play.

ACTION STEP 3

- a.** Build regional lifestyle and business brand identity.
- b.** Identify opportunities to expand, attract, and retain recreation and tourism-supporting businesses that align with regional lifestyle/business branding, including gear and clothing manufacturers, outdoor guides, cultural tourism, agricultural companies, artists, resort operations, gear shops, and high-altitude training centers, in coordination with regional collaborative governance as needed.

Diversify Regional Recreation Economy

Strategy 3: Diversify and leverage the region's recreation economy with tourism events, amenities, and attractions focused on the unique histories, arts, and cultures of the region's communities and establish new business opportunities in related industries.

ACTION STEP 1

Invest in tourism assets and amenities beyond outdoor recreation that increase the region's overall attractiveness and identity as a destination, especially small businesses, arts/culture institutions and events, and local food systems and agritourism, in coordination with regional collaborative governance as needed.

- a.** Assess capital investment plans for local governments, recreation districts, and the private sector and prioritize investment projects.
- b.** Determine the potential for regional, collaborative investments to strengthen funding applications and determine if a regional master plan is necessary.
- c.** Conduct feasibility studies on prioritized projects, identify potential funding sources, and plan for implementation.
- d.** Ensure long-term sustainable funding is considered for the ongoing maintenance of assets, support for management, and preparation of communities for greater visitation.

ACTION STEP 2

Discourage over-tourism by marketing principles and values of sustainable recreation, such as visitation to underused areas.

- a.** Collaborate with the Sierra Nevada Alliance to leverage the TakeCareSierra.org platform for education, outreach, and impact.

ACTION STEP 3

Reinforce regional connection through visitor infrastructure. Develop regionally consistent locally branded wayfinding programs to direct visitors to recreation and tourism amenities in coordination with regional collaborative governance as needed.

- a.** Inventory wayfinding needs and prioritize installation locations.
- b.** Identify a designer to work on branding.
- c.** Source funding to support the project.

ACTION STEP 4

Develop infrastructure to support regional events. Invest in traditional recreation infrastructure that supports attraction for regional sporting events and tournaments in coordination with regional collaborative governance as needed. Leverage these events to create year-round, high-quality employment for the tourist industry workers, many of whom have seasonal employment without benefits.

- a.** Assess capital investment plans related to traditional recreation infrastructure (local governments, tribal governments, recreation districts, and private sector) and prioritize investment projects.
- b.** Conduct economic impact analysis and feasibility studies on prioritized projects, identify potential funding sources, and plan for implementation.

Recreation and Tourism Resiliency

Strategy 4: Build resiliency in the recreation and tourism industries to withstand climate impacts and catastrophic events.

ACTION STEP 1

Create an implementation plan to mitigate the impacts of climate change on recreation and tourism industries by leveraging SRTI's A Changing Climate Vulnerability in California's Eastern Sierra and SBC's Sierra Nevada Vulnerability Assessment to inform policy, governance, and investment priorities. Determine available data and existing plans, update as necessary

- a.** Create an implementation plan for climate mitigation based on existing plans.
- b.** Build capacity for implementation and environmental monitoring of climate adaptation and mitigation initiatives.
- c.** Identify agency needs and budget with respect to environmental monitoring of climate adaptation initiatives.
- d.** Perform workforce assessment to address agency needs.
- e.** Identify lead contractors to pursue work and collaborate on work proposals.
- f.** Support on-the-ground fire hardening for local communities by investing in and expanding local resource conservation districts, fire-safe councils, and fire departments.

Potential Collaborators

STRATEGY	1				2			3				4
ACTION STEP	1	2	3	4	1	2	3	1	2	3	4	1
Organization Name												
Agriculture and Food Organizations								PC				
Alpine Trails Association	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC
Arts and Culture Community-Based Organizations								PC				
Bureau of Land Management	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC
California Farm Bureau								PC				
Chambers of Commerce					PC		PC	PC				
Destination Marketing/management Organizations	PC	PC	PC	PC	PC			PC		PC	PC	
Eastern Sierra Council of Governments	PC	PC	PC	PC	PC	PC		PC	PC	PC	PC	PC
Eastern Sierra Sustainable Recreation Partnership	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC
LADWP	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC
Local Governments	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC
Main Street Programs								PC				
Mammoth Lakes Trails and Public Access Foundation	L	L	L	L	L	L	L	L	L	L	L	L
Markleeville Disc Golf Association	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC
National Parks Service	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC
Other Public and Utility Land Managers	PC	PC	PC	PC	PC	PC				PC		
Public Agencies		PC			PC							
Resorts							PC					
SBC												PC
Sierra Nevada Alliance	PC	PC	PC	PC	PC				PC			
Small Businesses							PC	PC				
State Government						PC				PC	PC	PC
Tribal Organizations	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC
U.S. Forest Service	PC	PC	PC	PC	PC	PC		PC	PC	PC	PC	PC
Visit California				PC	PC							
Winter Wildlands	PC	PC	PC	PC		L		PC	PC	PC		PC
Yosemite Gateway Partnership	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC	PC

Legend

- L** Lead
- PC** Potential Collaborator

Potential collaborator suggestions were identified through community outreach sessions and public review of this document and will be codified and/or expanded upon during the implementation of action steps.