



visit  
**California**

Regional strategic tourism plan

# Gold Country

 **JLL** SEE A BRIGHTER WAY

June 2025



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The majority of the grant funds were used to directly support tourism recovery through marketing initiatives. With the EDA’s oversight, a portion of the grant was directed to the development of these plans, which are designed to build a more resilient travel and tourism sector in California. While the one-time nature of the grant does not provide funding for ongoing implementation, the plans identify existing resources that can be leveraged at the state and regional level.

Visit California extends its gratitude to the diverse project teams, strategic partners and industry experts whose contributions were instrumental throughout the two-year process.



PaZa Estate Winery



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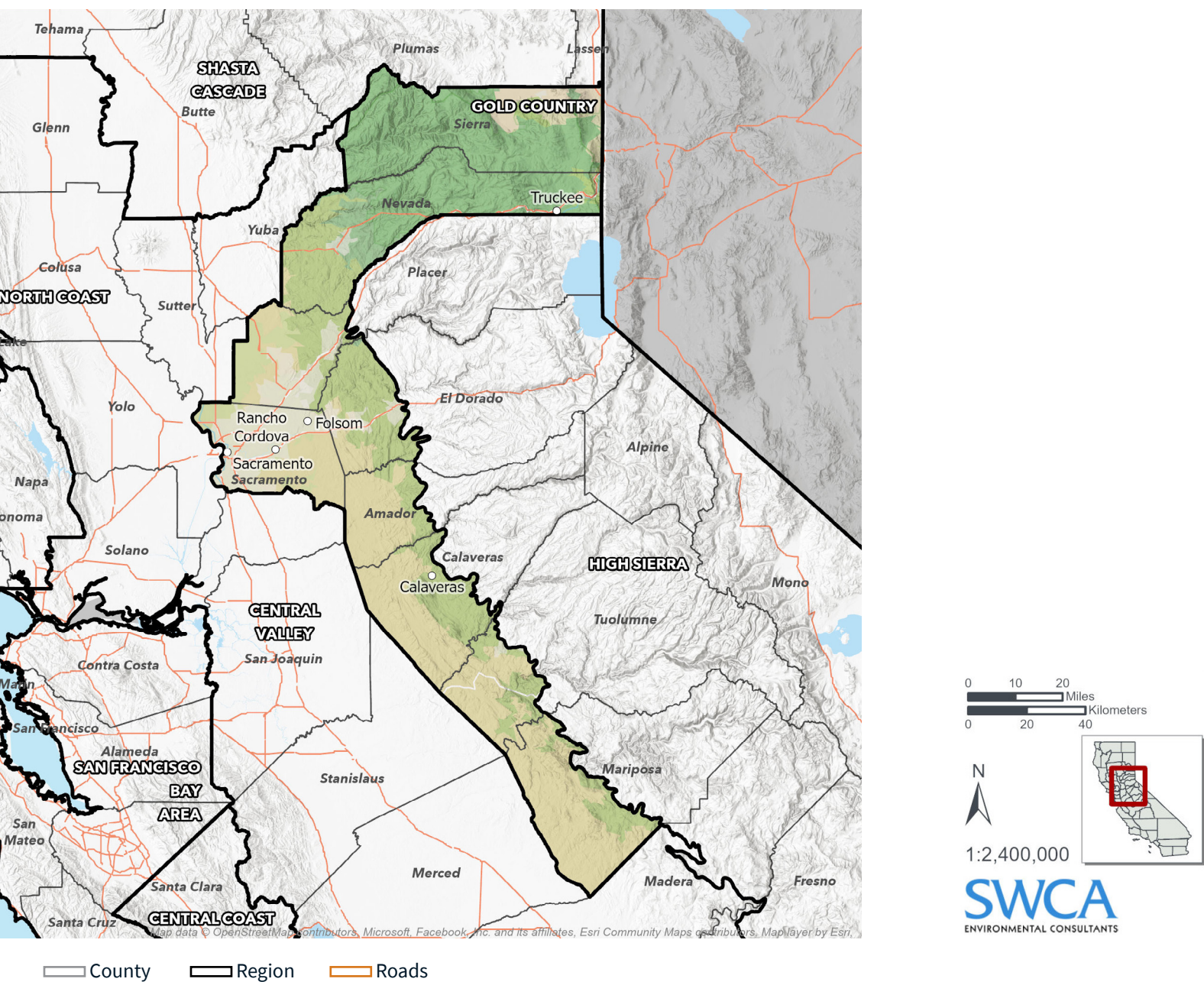
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# Executive summary

*The Gold Country, encompassing eight counties including Sacramento, Amador, Calaveras, El Dorado, Nevada, Placer, Sierra and Tuolumne, is a diverse region known for its rich Gold Rush history, natural beauty and small-town charm. In 2023, the region reported total travel spending of \$5.9 billion, showing a 3.9% increase from the previous year.*





To develop a comprehensive regional tourism strategy, Jones Lang LaSalle (JLL) and Visit California embarked on an extensive two-year planning initiative. This effort aimed to enhance, harmonize and validate existing destination plans while examining tourism priorities and opportunities from a regional perspective. The approach included a thorough review of primarily existing general/municipal and resiliency plans, such as the [Nevada County Recreation and Resiliency Master Plan](#), [Downtown Sacramento Partnership Strategic Action Plan](#) and [Livability Strategy](#), [City of Placerville Strategic Plan](#) and many others. Broad stakeholder engagement was conducted through various methods, including regional advisory committee meetings, tourism stakeholder surveys with over 139 participants, focus groups, individual interviews with 120-plus key industry stakeholders and site visits to 60-plus points of interest.

The research process utilized several proprietary tools and methodologies. The tourism readiness index analyzed nearly 4,000 tourism-related data points across 68 indicators. Results showed that the Gold Country surpasses state averages in four out of eight of the [index](#) pillars, particularly in safety and security, environmental attributes and urban readiness. The region is classified as an “emerging performer,” indicating potential for strategic development while balancing growth with sustainable practices.

The [demand driver scorecard](#) evaluated 279 attractions and experiences in the region. Notably, 26% of the scored assets are generating regional or national demand, with 10 attractions identified as national or worldwide demand drivers. These include the American River, Marshall Gold Discovery State Historic Park and experiences such as endurance training and whitewater rafting. The analysis also revealed that 65% of assets are family-friendly, and 55% are classified as outdoor recreation.

The [event matrix](#) process assessed 150 events across the region, identifying many unique events positioned to drive regional demand. The analysis revealed a concentration of these regional events during September and October, suggesting an opportunity to expand and diversify events throughout the year.



Johnny Cash Trail, Folsom



Based on these findings and stakeholder input, several strategic priorities were identified for the Gold Country:

- 1** Invest in tourism product development: focus on regionwide festivals and events, arts and culture, full-service hotels with meeting space and alternative experiences such as farm stays, eco-lodging and glamping.
- 2** Improve tourism-related transportation infrastructure: enhance connectivity, wayfinding and signage.
- 3** Support workforce development: increase awareness of the diverse career opportunities in the tourism industry.
- 4** Enhance regional marketing and messaging: broaden in-state and regional geographic reach and market segments and diversify the regional narrative beyond the Gold Rush.
- 5** Promote community engagement and balance: address resident concerns and highlight the positive impacts of tourism, particularly economic benefits.



Sierra Nevada Motorsports, Oakhurst



These opportunities align with state goals of sustainable tourism development, economic growth and enhancing visitor experiences while preserving the region’s unique character. Implementation will require ongoing engagement with stakeholders, including destination marketing organizations, local businesses and community organizations.

The strategic plan emphasizes the importance of balancing tourism growth — via product development and diversifying target markets and the Gold Country brand — with community needs, infrastructure development and environmental preservation. Ongoing collaboration among local stakeholders will be crucial in implementing these opportunities and ensuring the sustainable development of the region’s tourism industry.

JLL and Visit California would like to thank the Gold Country Regional Advisory Committee members who played a crucial role in this planning process. Their time, expertise, insight and valuable contributions throughout the process were instrumental in shaping this strategic plan. Their continued involvement and communication will be helpful in supporting implementation approaches to the strategic opportunities and ensuring the long-term success of tourism in the Gold Country region. Please refer to the committee participants in the [Appendix](#).



Young’s Vineyard, Plymouth



# Regional research and discovery

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



Calaveras County Fair, Angels Camp



*The regional research and discovery section includes vast research which has been detailed further and organized under the following categories for the Gold Country.*

### **JLL-conducted research components:**

- 1 State of the region overview: the overview provides a brief introductory summary of what currently impacts the tourism industry in the Gold Country.**
- 2 Destination plans review database: data gathering process which included 32 individual plans inventoried. Elements include addressing housing, employment, historic preservation and cultural heritage, sustainable tourism development, economic diversification, improving walkability in historic downtowns, managing visitor impact on natural resources, enhancing outdoor recreation infrastructure, balancing modernization with small-town charm and much more.**
- 3 Stakeholder engagement: this section incorporates feedback from multiple different methods outlined here:**
  - Regional advisory committees: meetings held monthly for 16-plus consecutive months with a committee consisting of 20-plus members. Please refer to the [Appendix](#) for a full list of members.
  - Tourism stakeholder survey: over 139 participants representing a diverse range of individuals and organizations involved in the tourism sector. The feedback summary highlights perspectives on strengths, weaknesses and growth opportunities.
  - Focus group feedback: in a small group environment, 10 in-depth discussions were conducted with stakeholders from 10 different sectors, including arts and culture; resilience and sustainability; meetings and events; workforce; DEI; transportation and more. Through these discussions, valuable insights were gathered on specific areas of interest and growth potential.
  - Individual interviews feedback: over 120 key industry stakeholders interviewed, offering a deeper understanding of perspectives and addressing any specific questions or concerns.
  - Site visits: visited 56-plus points of interest visited throughout the Gold Country across three weeks, providing valuable insights and observations.
- 4 [Tourism readiness index](#): detailed data analysis process which used nearly 4,000 data points to assess the readiness and capacity of the tourism industry in the Gold Country.**
- 5 [Demand Driver Scorecard](#): evaluation which identified the key assets and experiences driving visitor demand in the region.**
- 6 [Event Matrix](#): evaluation which identified key events driving visitor demand in the region.**

### **Visit California provided research, JLL reviewed components:**

- 7 The Economic Impact of Travel (Dean Runyan Associates, 2023)**
- 8 Visit California Community Sentiment Study (Future Partners, 2023)**

A comprehensive research approach allowed for the development of a clear vision and strategy for the Gold Country tourism industry, with foundational opportunities that are rooted in data, insights and feedback from stakeholders.



## State of the region

*The Gold Country region of California, nestled in the western foothills of the Sierra Nevada, is a captivating destination that offers a unique blend of rich history, natural beauty and small-town charm.*

This picturesque area, spanning eight counties including Sacramento, Amador, Calaveras, El Dorado, Nevada, Placer, Sierra and Tuolumne, is renowned for its pivotal role in the California Gold Rush of the mid-19th century. At the heart of the region lies state Highway 49, aptly dubbed the “Golden Chain Highway.” This scenic route connects a string of historic towns, offering visitors a journey through time where gourmet eateries, classic inns, hilltop wineries and Gold Rush history are waiting to be discovered. The highway connects many of the region’s varied attractions and showcases its diverse character.

In 2023, the Gold Country region experienced notable growth in its travel industry, with total travel spending reaching \$5.9 billion, representing a solid 3.9% increase from the previous year. Visitor spending accounted for \$4.9 billion of this total, while additional travel-related expenditures contributed \$1.0 billion. This positive trend demonstrates the region’s continued recovery and expansion post pandemic, underscoring the Gold Country’s enduring appeal and resilience as a travel destination within driving distance of strong source markets. The growth in travel spending reflects the region’s diverse attractions and ability to draw visitors, contributing significantly to its local economy (The Economic Impact of Travel, Dean Runyan Associates, 2023).

The Gold Country presents a tapestry of landscapes and communities that blends urban centers, suburban neighborhoods and expansive rural areas. This unique mix allows visitors to experience the conveniences and cosmopolitan aspects of city life and the tranquility of the countryside, all within a readily drivable geographical area. Historic mining towns dot the landscape, each with its own unique character and stories to tell. Places like Nevada City, Sutter Creek, Murphys, Auburn and Columbia preserve their Gold Rush-era architecture and offer visitors a glimpse into California’s pioneering past. These towns feature well-preserved main streets lined with Victorian-era buildings, antique shops, art galleries, historic hotels and local museums that showcase the area’s rich history.



Golden 1 Center



# State of the region

The Gold Country is also gaining recognition for its burgeoning wine industry. The region’s temperate climate and varied terrain have proven ideal for cultivating a diverse range of grape varieties. Visitors can explore numerous wineries and tasting rooms, particularly in Amador and El Dorado counties, that produce award-winning wines.

Visit California’s Community Sentiment Study highlighted the Gold Country’s appeal, showcasing its strengths in restaurants and dining options (86%), landscape and natural features (77%) and shopping districts (75%). Popular tourist attractions in the region include wineries/ vineyards (67%), hiking trails (66%) and casinos (66%). While residents regularly enjoy historic small towns (32%) and unique local restaurants (30%), they express concerns about overcrowding at casinos (22%) and large music events/festivals (16%). Approximately 58% of residents agree that tourism results in a better quality of life for the region, indicating an average sentiment toward the industry compared to other regions.

With its combination of historical significance, natural beauty and small-town hospitality, the Gold Country continues to captivate visitors, offering a unique glimpse into California’s past while providing a unique offering of amenities and experiences. Whether it’s for a weekend getaway or an extended exploration, the Gold Country promises a memorable journey through one of California’s most storied regions.



South Yuba River, Grass Valley



# Destination plans review database

The regional strategic tourism planning process was designed to examine issues from a regional perspective, building upon the valuable work already completed in destination-specific plans by destination marketing organizations, convention and visitors bureaus and municipalities. This approach ensures that existing efforts are leveraged and enhanced rather than duplicated.

The comprehensive review encompassed 500 plans across California, with 32 plans specifically focused on the Gold Country region. A full list of the reviewed plans can be found in the [Appendix](#).

*Upon analysis of the Gold Country plans, several key themes were identified that align with the priorities highlighted in the present plan.*

## 1 Historic preservation and community character

- Preservation of Gold Rush era architecture and heritage
- Balancing growth with small-town charm
- Promotion of cultural and historic tourism
- Adaptive reuse of historic structures
- Conservation of natural resources

## 2 Environmental stewardship and natural resource management

- Protection of watersheds and water quality
- Conservation of open spaces and agricultural lands
- Wildfire prevention and forest management
- Climate change adaptation and mitigation strategies

## 3 Economic diversification and revitalization

- Support for agriculture and wine industry
- Promotion of eco-tourism and outdoor recreation
- Downtown revitalization efforts
- Attraction of tech and green energy industries

## 4 Sustainable growth and infrastructure

- Smart growth principles and infill development
- Improvement of aging infrastructure
- Expansion of broadband and digital connectivity
- Sustainable water and energy management

## 5 Community health and quality of life

- Affordable housing initiatives
- Enhancement of parks and recreational facilities
- Improvement of healthcare access in rural areas
- Support for local schools and educational programs
- Public safety and emergency preparedness, including wildfire response

Working in conjunction with the regional advisory committee and armed with insights from the existing plans, the approach sought to examine regional issues holistically. This methodology was further validated through the engagement process. It is crucial to consider this regional plan in the context of destination-specific plans, recognizing that it does not aim to reinvent existing strategies. Instead, the regional plan serves to complement and align with these destination plans, while simultaneously reinforcing the significance of regional cooperation and engagement.





# Stakeholder engagement

*Stakeholder input was collected through multiple methods (outlined below in detail), including regional advisory committee discussion forums, a series of topical focus groups, a comprehensive tourism survey, a thorough site visit over multiple weeks and individual meetings with tourism stakeholders, industry leaders and related entities.*

## Regional advisory committees

Regional advisory committees were monthly gatherings composed of industry leaders within culture and heritage; diversity, equity and inclusion; economic development; lodging; meeting and events; resilience and sustainability; restaurants; retail and entertainment; workforce and more. Meetings were held monthly for 16-plus consecutive months. The committee consisted of 20-plus members, of which a full list can be found in the [Appendix](#).

## Tourism stakeholder survey

Questions from the survey capture a variety of topics, including travel preferences, satisfaction levels with accommodations, transportation, attractions, etc., suggestions for improvement and more. The tourism survey was conducted anonymously to encourage feedback and diverse perspectives from various sectors across the region, while asking overall demographics and industry profile questions to shed light on the represented stakeholder groups. This survey garnered 139 responses from across Gold Country.

## Focus groups

Focus groups were conducted to discuss key themes and gather qualitative data. We conducted 10 focus groups with nearly 100 total participants, including DMO leaders; representatives from the lodging, restaurant, retail and entertainment sectors, and specialists in culture and heritage, economic development, workforce development, resilience and sustainability, transportation and infrastructure, outdoor recreation, diversity, equity and inclusion, and more.

## Individual interviews

Individual meetings were held with stakeholders to collect detailed feedback. The stakeholders included industry leadership and management, supporters and individuals concerned with tourism's potential challenges and impacts on the Gold Country. The interview process encompassed 120-plus individual interviews, including all members of the regional advisory committee.

## Site visits

Multiple visits were conducted to the Gold Country region to immerse further in the local environment, engage directly with stakeholders, visit tourism sites and attractions and witness firsthand the dynamics of the tourism industry in the Gold Country. Over 56-plus points of interest were visited throughout the Gold Country across three weeks.

The diverse set of perspectives ensured our study comprehensively captured both the benefits and potential drawbacks of tourism. All stakeholder feedback also provided key guidance and direction to become the basis of many opportunities, supported by real-life examples from site visits.



# Key themes from stakeholder engagement

*The various methods of stakeholder feedback reflected several major themes within the Gold Country region.*

- The Gold Country blends diverse experiences and attractions in urban, suburban and rural environments across a wide geography, creating both opportunities and challenges for balanced tourism development, infrastructure planning and organizational connectivity.
- The region's vulnerability to wildfires and the increasing difficulty in obtaining affordable fire insurance pose challenges to attracting investment and development.
- While the Gold Country benefits from good accessibility to drive markets and proximity to airlift, its ability to capture overnight stays is limited due to inadequate connectivity (Wi-Fi), wayfinding/signage, inventory of specific types of accommodations (high-quality resorts, meeting-oriented hotels, glamping, etc.) and overall visitor awareness of the region's offerings. These contribute to its positioning as a primarily day-trip destination.
- The Gold Country's lodging landscape varies widely: rural areas offer mainly small, seasonal accommodations and campgrounds; Sacramento provides diverse branded hotels and targets leisure travelers and meetings/conventions; while suburban markets feature branded select-service hotels for business and sports visitors.
- The region has a unique and diverse array of historic and natural assets rivaling competitors while offering lower costs and less crowding. However, it faces challenges in market awareness, community resistance to development, DMO funding, workforce housing, entertainment options, seasonal business operations and more.
- A concern is ensuring the safety of residents and visitors in both urban and rural areas, particularly in relation to issues like homelessness and crime.
- The tourism workforce in the Gold Country faces challenges associated with the affordability of living, including the lack of affordable workforce housing due to the proliferation of vacation homes and short-term rentals, long-distance commuting and seasonal impacts on recruiting and retention.
- Tourism-associated businesses in the Gold Country are challenged by the high cost of hiring and retaining employees.
- With respect to crises such as wildfires, stakeholders prioritize preparedness, effective communication and mitigating long-term impacts on tourism such as brand tarnish. Preserving natural resources and supporting land trusts are also key regional concerns. Natural assets, such as rivers, mountain areas and state parks, are delicate ecosystems that require special care to avoid damage and ensure their long-term sustainability.



Folsom Historic District



- Arts and culture in the Gold Country has not been fully embraced as a tourism driver, resulting in limited funding for stakeholders and organizations to conduct marketing efforts to promote arts, culture and heritage offerings. Additionally, a lack of market awareness and inconsistent representation and organizational structures across the region, have resulted in a muted impact of arts and culture on tourism.
- Overall support for tourism and understanding of its impacts are limited, resulting in a wariness among residents and municipal governments in several counties.
- Expected to enhance brand image, visitor perception and awareness of the region: creating new events/festivals, extending existing ones thematically connected to specific geographies, leveraging the success of popular Sacramento festivals and accounting for seasonality to ensure visitor distribution and prevent cannibalizing audiences. These moves should mitigate monthly and weekly fluctuations in visitation.
- Diversifying the “story” of the Gold Country beyond the Gold Rush to include other narratives, such as Native American heritage, and connected thematic experiences, such as wine trails, can both grow visitation and increase penetration of underrepresented market segments.
- The Gold Country has world-class recreational offerings — such as white-water rafting — that should be prioritized in marketing and packaging the region to expand its geographic reach and increase penetration of the millennial and Generation Z market segments.

The key themes identified above present a brief synopsis of the stakeholder conversations, focus group feedback, survey results and individual interviews. The themes supported the development of the priorities in this plan. The regional strategic planning process leveraged stakeholder feedback to validate research and direction for the future of the region. While this plan addresses many crucial aspects of tourism development, it is important to acknowledge that some identified issues fall outside the direct purview of the tourism industry and may require coordinated action from various levels of government and other sectors to effectively address.



Sierra Nevada Mountains



# Tourism readiness index

## Overview

The first phase of the market study involved an in-depth analysis of the Gold Country as a destination based on the tourism readiness [index](#). The index is an analysis tool developed collaboratively by JLL and the World Travel & Tourism Council (WTTC). The tourism readiness index offers destinations an opportunity to evaluate and comprehend their own tourism preparedness based on 68 essential data points that directly influence the tourism industry. The indicators evaluate the current state of the region's tourism industry and identify potential areas for future growth.

The assessment encompasses research of various aspects within a destination's landscape, including traditional hotel performance metrics, infrastructure and capacity building, environmental sustainability requirements and more. With the insights provided by the tourism readiness [index](#), destinations can gain a thorough understanding of growth readiness, enabling informed decisions and optimization of tourism strategies.

A comprehensive analysis was conducted on all 58 counties in California, examining a total of 68 indicators. The process resulted in the collection and organization of nearly 4,000 data points, categorized according to regional boundaries. All sources included were vetted by JLL and WTTC.

The tourism readiness [index](#) analyzed data for each region in the following categories:

- **Scale:** the capacity of the destination's tourism infrastructure, considering its size and volume.
- **Concentration:** the tendency to attract leisure visitors who focus on specific key attractions and areas.
- **Leisure:** evaluation of visitor spending, perceived attractiveness and specific attractions related to cultural and natural heritage sites and retail offerings.
- **Business:** the development of necessary infrastructure and products to support business travel.
- **Urban readiness:** investments in enhancing connectivity within the destination to attract business opportunities, talent and visitors.
- **Safety and security:** the prioritization of safety and security within policies and practices.
- **Environmental readiness:** the prioritization of sustainability through reflected strategies, policies and destination positioning.
- **Policy:** the integration of tourism policy within the destination's broader agenda.

These eight categories each incorporate up to 15 data points that are grouped to create the pillars of tourism readiness. The data points in each pillar are weighted and scored. The outcomes from this analysis determine what features of the destination need to be prioritized to ensure long-term smart growth to positively impact the local economy through tourism's benefits. See [Appendix](#) for further detail on the tourism readiness [index](#) methodology.



Nedler Grove, Oakhurst



## The Gold Country results

The tourism readiness [index](#) reveals that the Gold Country surpasses state averages in four out of eight pillars, showcasing strong performance. Notably, the Gold Country stands out when compared to other regions in terms of safety and security, environmental attributes and urban readiness. However, it falls behind in the scale in concentration, leisure and business categories.

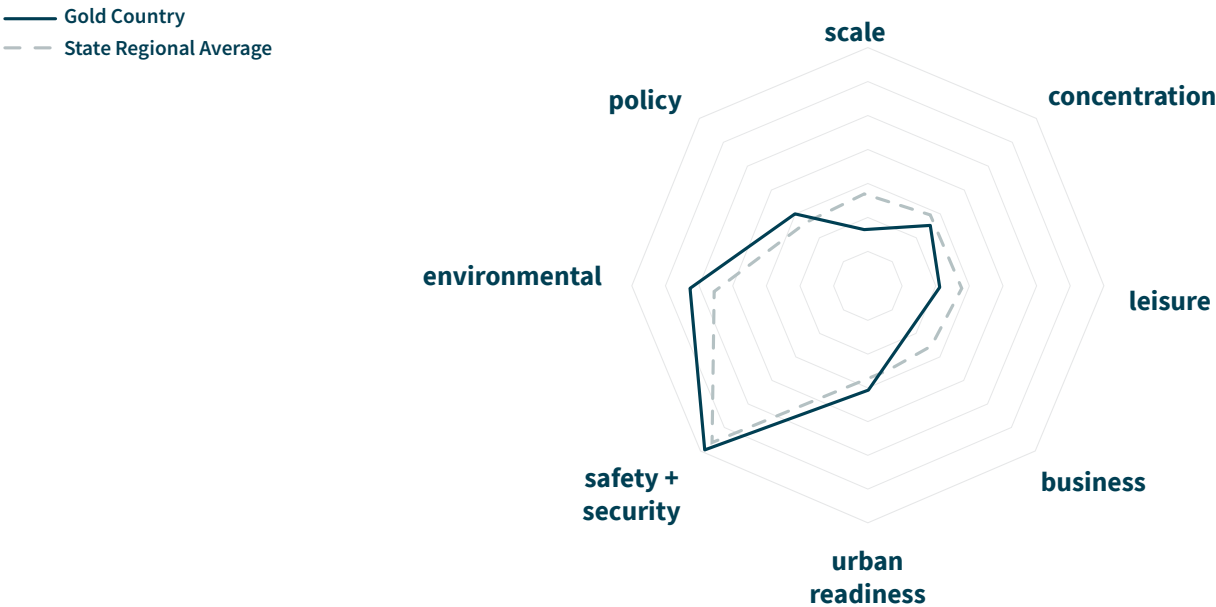
In-depth analysis of data from reputable global databases such as Centre for Aviation, CoStar, Oxford Economics, Tripadvisor and more shed light on the factors contributing to the Gold Country’s readiness performance. For instance, the analyzed data highlights the positive impact of factors like crime statistics, population growth, traffic congestion, air quality and renewable energy usage when compared to other regions. Conversely, certain data points contribute to the underperformance in areas such as availability of lodging and meeting space, average daily rate and visitors per square mile. These insights provide opportunities for targeted improvements to enhance the Gold Country’s overall tourism readiness and maintain its competitive edge.

Based on the results, the Gold Country is classified as an “emerging performer.” This typology represents a destination that shows promise and potential but is still in the early stages of developing its full tourism capacity. While these destinations might be smaller in scale, they offer opportunities for strategic development initiatives to capitalize on the rising momentum, further enhance their tourism offerings, and attract a larger tourist base. However, as they experience new growth, they may face pressures due to their limited capacity. Balancing growth with sustainable development is crucial for these destinations to thrive.

As an emerging performer, the Gold Country should focus on leveraging its established tourism infrastructure while implementing sustainable development practices to manage growth effectively. The region should invest in strategic initiatives to diversify and enhance its tourism offerings, catering to evolving visitor preferences and potentially exploring niche segments. Implementing capacity management strategies is crucial to handle increasing tourist numbers without compromising the quality of experience or local resources. The Gold Country should also develop targeted marketing campaigns to attract a broader range of visitors, collaborate with local stakeholders to ensure tourism growth benefits the community and continually upgrade existing attractions to meet changing expectations. Investing in digital infrastructure and smart tourism technologies can enhance visitor experiences and operational efficiency.

Throughout this process, it’s important to monitor and address any emerging challenges related to new growth, such as environmental impacts or strain on local services, to maintain a balance between development and sustainability. Please refer to the [Appendix](#) for a more detailed overview of the tourism readiness [index](#) and all destination typologies.

### Outcome by pillar





# Demand driver scorecard

## Overview

The regional strategic planning process utilized JLL’s proprietary demand driver scorecard to evaluate the impact of individual regional assets and experiences and future investment opportunities. The demand driver scorecard is designed to establish a baseline and identify investment prospects within the tourism sector. Strategic planners, investors and developers gain the ability to make informed decisions backed by robust data and analysis. The scorecard assists destinations in strategic planning and guides stakeholders in the formulation of targeted marketing to maximize returns.

This scoring process was based on an evaluation which includes:

- **Multistep assessment:** evaluating and assigning points to each attraction or experience against eight key criteria, including current visitor demand levels, event opportunities, engaging visitor experience and more (further detail outlined in [Appendix](#)).
- **Categorization as attractions vs. attractors/demand generators:** categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** classifying each attraction into a category based on overall points score. Categories were little to no visitor interest (0-20), interesting to do on a repeat visit (20-40), “must see” if in the area (40-60), regional attractors (60-80), national attractors (80-95) and global attractor (95-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Categorization of each demand driver:** segmenting assets into 13 unique market categories based on specific criteria and characteristics, including family-friendly attractions, museums, entertainment, educational attractions, outdoor recreation and more. Assets could be assigned to multiple relevant categories.

Categorization of a region’s demand drivers helps assess the visitor experience, assists in strategic planning, identifies areas for future development or revitalization projects and enables the prioritization of enhancements to visitor-facing attractions. Overall, asset categorization provides a framework for a more organized and detailed analysis, aiding in regional research and discovery, planning and decision-making processes.



Don Pedro Lake, Jamestown



Prost Beer Hall, Elk Grove





Hyatt House, Sacramento

## The Gold Country results

The Gold Country demand driver scorecard process assessed 279 attractions and experiences across the region, which were identified by regional advisory committee members, desktop research and by JLL during site visits. The scoring and analysis is a representative analysis intended to highlight the inventory and diversity of assets and experiences in the Gold Country.

The results reveal that 26% of the scored assets are generating regional or national demand. Notably, 10 attractions and experiences are identified as national or worldwide demand drivers, including popular destinations and experiences such as the American River, Marshall Gold Discovery State Historic Park and endurance training. Additionally, there are 65 assets and experiences categorized as regional demand drivers, with examples like Calaveras Big Trees State Park, Sacramento Zoo, as well as culinary experiences. Experiences consistently ranked higher than the individual assets that comprised them (e.g., wineries, breweries, history, etc.) which shows that the importance of packaging key themes is critical to the Gold Country experience.

According to the analysis, 65% of assets scored in the region are considered family-friendly, with over 70 of these assets driving regional and national demand. Notable examples of family-friendly attractions include Old Sacramento, Mercer Caverns and Columbia State Historic Park, among others. The abundance of family-friendly attractions in the region highlights the importance of catering to the needs and preferences of family travelers.

Furthermore, approximately 55% of the assets scored are classified as outdoor recreation, of which 25% are considered attractors for the region. The outdoor recreational areas encompass popular experiences such as white water rafting on the American and South Yuba rivers. It is essential to underscore the significance of preserving and maintaining the natural assets within the region. Natural resources, such as rivers, parks and mountains, not only enhance the quality of life for residents but also play a vital role in attracting visitors and driving tourism.

As a third and final example, 35% of all assets are related to culture, heritage and history, with 35% or 34 of those assets classified as attractors. These assets include Railroad 1897 State Historic Park, Knight Foundry and historic towns, among others. Culture and heritage assets have the third-highest ratio of regional and national demand drivers, which shows significant potential to enhance the visitor experience and increase visitation/awareness for many of these assets.

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

The demand driver scorecard analysis findings have supported the identification of key priorities and the formulation of opportunities to continue positioning the Gold Country for sustainable success.



# Event matrix

## Overview

The event matrix process encompassed a thorough evaluation of existing annual leisure-facing events within each region. The assessment helps tourism stakeholders understand which events generated the most impact and, more specifically, what aspects of event planning could further enhance the event. Similar to the demand driver scorecard, JLL’s event matrix product involves a dedicated analysis of individual events, charting their outcomes and impacts based on overall scores.

The iterative approach enables continual refinement and optimization as events are held each year. It empowers regions, DMOs and event organizers to stay ahead of market trends and make strategic adjustments to optimize event offerings, ensuring events remain competitive in the ever-changing landscape of the industry.

The event matrix process included:

- **Identifying significant events:** collaborated with regional advisory committee members and DMOs to inventory regionwide event master list.
- **Utilizing comprehensive criteria:** scoring each event based on 11 detailed criteria aligned with the broader tourism landscape, such as event infrastructure, planning, marketing and potential economic impact.
- **Categorizing events based on score:** categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** classifying each attraction into a category based on overall points score. Categories were community-based events (0-60), regional events (60-80), national events (80-95) and global events (95-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Evaluating critical mass:** assessing the overall volume and significance of current events, identifying need periods, gaps and opportunities.
- **Leveraging outcomes:** developing optimal calendar programming and identifying specific opportunities to enhance events.
- **Collaboration:** working closely with the regional advisory committee to review effective tactics, addressing study results and engaging individual event organizers in the future.

This approach ensures a well-informed understanding of the event landscape and helps in positioning regions for success by focusing on high-impact events. See [Appendix](#) for further detail on the event matrix methodology.



Vina Castellano Winery, Auburn



*The Gold Country results*

The Gold Country event matrix process inventoried 150 events and scored 76 events across the region that were collaboratively identified by the regional advisory committee and during our regional in-person meetings and site visits, noted as high priority in stakeholder surveys and validated as significant current and future room night generators during stakeholder discussions. The Gold Country hosts an array of annual events, with a diversity of events across the region and throughout the year.

The outcomes from this analysis identified 20 unique events that are positioned to drive national (3) and regional (17) demand to the Gold Country region, including the GoldenSky, Aftershock and Farm-to-Fork festivals, Ironman, Western States Endurance Run, Sol Blume and many others. The high-impact events drive extensive leisure tourism, reinforce the positive nature of the Gold Country brand and enhance the destination’s visibility. Hoteliers, retailers, creative economy representatives and other regional representatives reinforce the significant annual economic impacts of these events. The Gold Country events also exhibit significant seasonality, attracting national visitors in September and October only.

We analyzed several additional events, such as Sonora Christmas Parade, Tuolumne County Art Week, Placerville Oktoberfest, El Dorado County Fair and Twain Harte Outhouse Races. While these events attract some visitors, overall scores indicate they are primarily local in nature and contribute relatively less overnight visitation and economic impact as compared to other annual events in the region.

The results of the event matrix indicate stakeholder focus should be placed on regional annual events that have a greater potential for driving overnight visitation and substantial economic impact. Further, it is recommended that the event matrix is utilized on an ongoing basis as an objective approach to evaluating the event inventory at any given time to assess the impacts of current events in the region.

Additionally, it is highly recommended to supplement the utilization of the event matrix with external resources to support events with regional impact. Collaborating with local DMOs, economic development organizations, stakeholders such as event organizers and promoters and industry experts can provide valuable insights, data and expertise to further evaluate the potential economic benefits and overnight visitation drivers of current and future regional annual events. This collaborative approach in conjunction with the event matrix, ensures a comprehensive and well-informed decision-making process when assessing the overall impact of current events in the region.



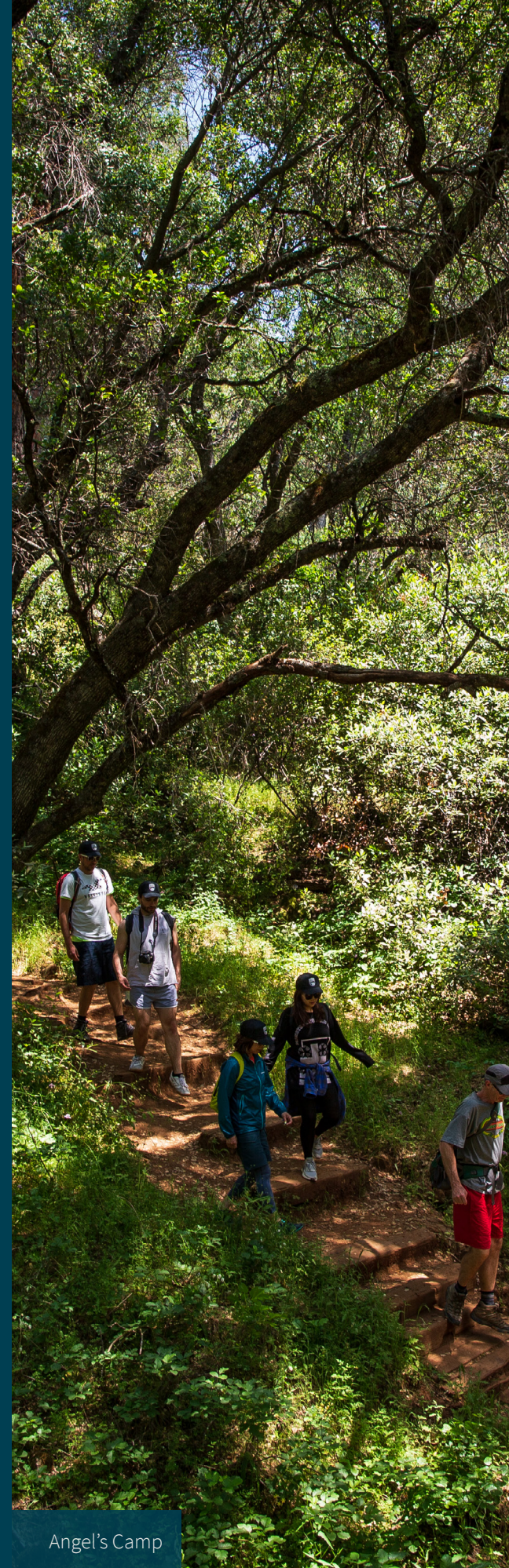
Sacramento Memorial Auditorium



# Key themes from the research process

- Widespread stakeholder engagement played a crucial role in developing the regional strategic plan, with input gathered through various methods such as interviews, surveys and focus groups.
- Key themes that emerged from the engagement process include the recognition that continuously improving the regional visitor and attendee experience is crucial for the success of the region. Growing both the leisure and group segments were identified as playing vital roles in driving future economic growth and sustaining a thriving visitor economy. The themes will be further explored in the opportunities section of this plan.
- JLL's tourism readiness **index** classifies the Gold Country as an “emerging performer” showing the regions delicate balance of established tourism infrastructure and need for future investment.
- As an emerging performer, the Gold Country should leverage its established tourism infrastructure while implementing sustainable development practices to manage growth effectively. The region should invest in strategic initiatives to diversify and enhance its tourism offerings, catering to evolving visitor preferences and potentially exploring niche segments.
- The Gold Country demand driver scorecard process assessed 279 attractions and experiences across the region. An investment prioritization approach based on the results of the scorecard should be put into motion during the first year of implementation.
- The demand driver scorecard results highlight the inventory and diversity of the Gold Country's attractions and experiences, with 26% of scored assets generating regional or national demand.
- The Gold Country event matrix process inventoried 150 events and scored 76 events across the region. It indicated the events that show most potential for future growth.
- The event matrix analysis identified four unique events in the Gold Country that are positioned to drive national demand, attracting visitors consistently throughout September and October.

Throughout the planning process, JLL also conducted an in-depth review of research and data provided by Visit California. Below is a summary of the findings for Gold Country.



Angel's Camp



**The Economic Impact of Travel**

*(Dean Runyan Associates, 2023)*

This report provides a comprehensive analysis of the economic effects of travel on California’s Gold Country region. It addresses various key metrics such as travel spending, earnings, employment and tax receipts. The data below is based on estimates and research conducted by Dean Runyan Associates for Visit California.

In summary, in 2023, the Gold Country region saw significant growth in its travel industry, with total travel spending reaching \$5.95 billion, marking a 3.9% increase from the previous year. Visitor spending accounted for \$4.94 billion, while additional travel-related expenditures added \$1.01 billion. This upward trend reflects continued recovery and growth in the region’s travel industry post-pandemic, highlighting Gold Country’s appeal as a travel destination.

The economic contributions of travel in the Gold Country region were substantial. Employment within the travel industry surged by 6.2%, providing 54,270 jobs. Direct travel-generated earnings increased by 12.5% to \$2.38 billion, with key sectors such as accommodations and food services (up 7.9% to \$1.33 billion) and arts, entertainment and recreation (up 26.6% to \$650 million) showing significant growth. Tax receipts generated by travel spending totaled \$456 million, with \$205 million in local taxes and \$251 million in state taxes.



Natural Bridges, Angel’s Camp





Industrial Food Works, Sonora

Visit California Community Sentiment Study

(Future Partners, 2023)

The Visit California Community Sentiment Study provides detailed findings and insights from various regions, including demographic data and the perceptions of residents regarding tourism. It explores both the benefits and strains of tourism on local communities and regions, highlighting aspects such as economic opportunities, traffic congestion and quality of life impacts. Specifically, the Gold Country is examined in terms of its residents’ views on tourism’s economic contributions, the challenges it creates and overall community sentiment.

Key findings for the Gold Country include residents’ appreciation for local amenities like restaurants and natural landscapes, their views on tourism’s role in providing business and job opportunities and the challenges posed by traffic and litter. This study includes more detailed evaluations on how tourism affects the Gold Country below.

The Gold Country offers numerous appreciated features, such as restaurants (86%), landscape/natural features (77%) and shopping districts (75%). Popular tourist attractions include wineries/vineyards (67%), hiking trails (66%) and casinos (66%). While residents enjoy these amenities, issues like casino overcrowding (22%) and culinary festival congestion (15%) are points of concern. Tourism’s dual impact is evident, with locals recognizing significant business opportunities (77%), job creation (72%) and hotel support (78%), alongside prevalent issues such as traffic (73%), litter (73%) and crowding (68%).

Residents are split about evenly on the impacts of tourism on quality of life. Nearly half of the residents agree that tourism’s benefits outweigh its problems both locally (48%) and regionally (51%). Importantly, tourism is crucial for regional economic health, with 55% of locals deeming it vital for their community and 73% for their region. In addition, approximately 43% feel that their quality of life is improved by tourism locally, increasing to 58% when considering the broader region.

Strategically, the Gold Country might focus on balancing tourism’s economic benefits with quality-of-life improvements. Addressing traffic congestion, litter and crowding through infrastructure and policy changes could strengthen tourism’s positive perception. Enhancing and creating awareness for lesser-known local attractions could distribute visitor pressure more evenly, reducing stress on the most popular sites like casinos, wineries and natural attractions. A targeted campaign highlighting the symbiotic relationship between tourism and community well-being might also foster resident support and minimize resistance, particularly given the strong recognition of tourism’s role in supporting local businesses and job creation.



# The Gold Country regional opportunities

The Gold Country regional opportunities outline several key priorities and strategies to enhance the region's tourism industry and address critical challenges. These opportunities have been developed through comprehensive research, extensive stakeholder engagement and thorough analysis of the Gold Country's unique attributes. The opportunities span across various crucial aspects of tourism development, including tourism product development, tourism-related infrastructure and sustainability and resilience.

Each opportunity area is accompanied by possible strategies designed to leverage the Gold Country's diverse assets, address existing challenges and position the region as a premier, sustainable destination for visitors. The following sections delve into these opportunities in detail, providing a comprehensive road map for stakeholders, DMOs and partners across the Gold Country to consider in the coming years. These strategies aim to foster a more integrated, sustainable and resilient tourism ecosystem that benefits both visitors and local communities while preserving the natural beauty, rich history and cultural heritage that makes the Gold Country unique.

## 1 Invest in tourism product development

### Regionwide festival and events

Rural Gold Country currently experiences significant decreases in visitation during the shoulder- and off-seasons, and weekdays versus weekends year-round. The region can leverage the successes of Visit Sacramento in creating the "City of Festivals" brand, which has resulted in significant increases in overnight business during shoulder periods.

Over the last five years, Sacramento has become a major destination for festivals on the West Coast. One of the first, Aftershock, has grown into the largest hard rock festival of its kind in the West, which started off as one day and is now four in the beginning of October. According to Visit Sacramento, Aftershock's economic impact is \$28 million. Leveraging the successes of Aftershock, Sacramento then worked with promoters to develop GoldenSky, a two-day country music festival with an estimated economic impact of \$12 million. GoldenSky expanded to three days in October 2024, following Aftershock earlier in the month, which is expected to generate more visitors from outside the local market, with total attendance surpassing 220,000.

Another notable event, which celebrates Sacramento's agricultural bounty, is the two-week Farm-to-Fork Festival, held every September and attracting 150,000 attendees in 2023, the festival's 10th anniversary. The city promotes itself as "The West Coast's Top Food and Music Destination."

Sacramento incentivizes community events via [City of Festivals grants](#). Events must be consistent with family-oriented themes, support arts and cultural entertainment and activities, promote a healthier living environment and enhance the quality of life in the city. Grant funds can be used for costs incurred in connection with the special event, including city costs for police services, parking and permits, and other event expenditures such as private security, portable restrooms and event fencing.



Similar large-scale festivals and events hosted outside of Sacramento County in the Gold Country are more limited and would benefit the region in terms of creating awareness of its offerings, overnight demand and visitor spending.

Sacramento continues to invest in its festival strategy as well as its anchor attractions/amenities and lodging opportunities. Sacramento City Council recently **unanimously approved three tourism-boosting proposals**: a plan to revitalize Old Sacramento Waterfront, a \$2 million investment in Visit Sacramento to attract more festivals and the construction of a new 350-room Hilton hotel connected to the convention center, all aimed at enhancing the city's appeal as a tourist destination and addressing accommodation needs for larger events. Rural counties within the region can also benefit from a holistic strategy focused on growing the regional festival market and enhancing competitiveness for events via the ongoing revitalization of historic attractions and the development of new meeting-oriented hotels, as discussed below.

A coordinated regional festival approach provides multiple benefits. It enhances the visitor experience by offering a diverse range of events, potentially extending stays and boosting off-season tourism. This strategy also promotes economic efficiency through shared resources and services. By pooling marketing efforts, event management expertise and promotional assets, participating destination management organizations can leverage economies of scale. This collaborative model optimizes limited budgets and resources, ultimately leading to more effective and successful festival outcomes across the region.

### *Key partners*

Visit Sacramento, City of Sacramento Convention and Cultural Services, El Dorado Chamber of Commerce, Placer County Economic Development, Amador County Economic Development Corporation, Tuolumne County Economic Development Authority, Nevada County Economic Resource Council, Calaveras County Economic & Community Development, Grass Valley/ Nevada County Chamber of Commerce, Auburn Chamber of Commerce, Placerville Downtown Association, Amador Council of Tourism, Tuolumne County Visitors Bureau, Calaveras Visitors Bureau, Gold Country Visitors Association, Highway 49 Association

### *Strategies*

- Create a festival strategy that impacts rural areas, enhances visibility of the Gold Country and attracts attendees during off-peak periods; this holistic strategy aligns with **Downtown Sacramento Partnership's Strategic Action Plan**, which sought, among other goals, to revitalize the economy, to "make downtown the most desirable place in Sacramento to do an event."
  - Conduct a regional inventory and assessment of existing festivals and events across the different counties to identify gaps, overlaps and opportunities for coordination.
  - Analyze regional inventory to understand seasonality, accommodation capacity and market segments (e.g., GoldenSky attracts Gen Z and Millennials, while Aftershock attracts Gen X).
  - Establish a shared calendar and communication platform to align and crosspromote festivals and events happening throughout the region.
  - Assess existing regional venues, accommodations, transportation and other infrastructure that support festivals and events to identify gaps, capacity constraints and areas for improvement.
    - Calaveras County's **Ironstone Vineyards** may have capacity to host multiday festivals during certain times of the year; additional factors to be assessed would include available overnight accommodations and regional accessibility via shuttle or other transportation options.
  - Identify relevant private sector stakeholders such as hotels, indoor and outdoor venues/event space, campgrounds, restaurants, attractions and others who could participate in the regional festival strategy.
- Organize, promote and provide logistical support for major events.
  - Create satellite/encore and new events, e.g., with local bands, and identify brand sponsors; identify each county's strengths to complement new and encore events (e.g., concentration of wineries will complement a regional wine and food festival).



**Arts and culture**

The tourism sector is estimated by the World Travel and Tourism Council to contribute 330 million jobs — one in 10 jobs around the world — while cultural tourism alone accounts for a significant share of tourism employment by generating 40% of world tourism revenues.

Arts and culture in the Gold Country is challenged by limited resources to promote arts, culture and heritage offerings and accompanying lack of market awareness, and inconsistent representation and organizational structures across the region.

*Key partners*

Nevada County Arts Council, Placer County Arts Council, El Dorado Arts Council, Amador County Arts Council, Tuolumne County Arts Alliance, Calaveras County Arts Council, Gold Country Visitors Association, California Arts Council

*Strategies*

- Incorporate arts and culture into placemaking strategies to create vibrant and attractive destinations within the region. This is aligned with Nevada County’s goal to “Expand the ‘Art in Public Spaces’ program” in its [Recreation and Resiliency Master Plan](#), which includes multiple considerations for how to elevate arts and culture experiences through placemaking.
- Create a digital cultural asset map of existing arts and culture attractions and continually update it so it can be leveraged as a wayfinding tool and storytelling medium, such as [Nevada County’s interactive map of cultural assets](#).
- Conduct economic impact analyses to create a baseline and illustrate ongoing growth. Incorporate the economic impact data into regional marketing and promotional efforts, highlighting the value that arts and culture brings to the Gold Country area, as exemplified in Nevada County Arts Council’s [Art & Economic Prosperity Study](#).
  - Additionally, a key cornerstone to Nevada County’s [Recreation and Resiliency Master Plan](#) is to promote and bring awareness to the many economic opportunities and benefits of arts and culture.
- Conduct surveys and focus groups to understand the specific interests and preferences of residents regarding arts and culture and use this feedback to shape the development and programming of arts initiatives that align with the community’s values and aspirations.
  - An objective of Placerville’s [Strategic Plan](#) is to “enhance and diversify cultural and other tourism attractions.” In this regard, community and stakeholder engagement to account for both resident and visitor interests will be critical to long-term investment in tourism product development.
- Improve Indigenous representation in the tourism narrative and product offerings by incorporating Indigenous perspectives to authentically honor and preserve the legacy of the original settlers, fostering a more inclusive and respectful approach to cultural heritage.
  - An example of holistic and regionally integrated Indigenous tourism is British Columbia’s [Gold Rush Trail](#).
- Renovate the museum at the Marshall Gold Discovery State Historic Park — at the heart of the first place in California where gold was discovered — to be interactive, powered by state-of-the-art technology and inclusive in its telling of Gold Rush history, incorporating the stories of immigrants and Indigenous peoples to grow visitation by appealing to a more diverse visitor base.



**Lodging and accommodations**

Based on stakeholder input, direct regional observations and analysis of hotel inventory relative to other areas, overnight accommodation options in the Gold Country’s rural counties are constrained. The current lodging landscape primarily caters to leisure travelers and consists of a mix of smaller, often unbranded hotels (some of which close seasonally), limited-service chain hotels, inns, bed and breakfasts, campgrounds and short-term rentals, many of which operate with minimal or no regulatory oversight. Recently, the area has seen the introduction of some full-service historic hotels, adding to the existing options.

Diversifying the inventory with a focus on regulated lodging establishments will potentially result in increased overnight visitation and enhance the lodging options in rural areas of the Gold Country.

In Sacramento and its suburbs, there is a large and diverse inventory of lodging options, primarily branded, addressing a diverse market segmentation.

*Key partners*

California Hotel & Lodging Association, Gold Country Bed and Breakfast Association, Placer Valley Tourism, El Dorado County Lodging Association, Tuolumne County Lodging Association, Calaveras Visitors Bureau, Nevada City Chamber of Commerce, Grass Valley Downtown Association, Auburn Old Town Business Association, Placerville Downtown Association, California Association of Boutique & Breakfast Inns, Visit Placer, Visit El Dorado, Visit Tuolumne County, Visit Amador County, Visit Calaveras, Gold Country Visitors Association, California Travel Association, California Lodging Industry Association

*Strategies*

- Develop and enhance overnight accommodations to induce demand and accommodate growth in rural counties.
- Develop high-quality hotels with meeting space to attract self-contained groups during the weekdays and incentivize adaptive reuse of historic buildings.
  - The [Hotel Sutter](#), [the National Exchange Hotel](#) and [Holbrooke Hotel](#) are all thriving historic hotel conversions in the region.
- Develop hip and stylish boutique/lifestyle hotels with artisanal food and beverage in the historic town centers, which could attract Gen Zers and millennials in line with opportunities for increasing market diversity.
- Identify and analyze opportunities for glamping, which is aligned with the region’s natural attractions.
- Promote “bleisure” opportunities in rural counties to attract business travelers and conference/convention attendees in Sacramento and its suburbs.
- Use demand driver scorecard results and criteria to identify unique amenities and offerings of the rural counties. This will help in showcasing the value proposition to potential visitors.
- Promote leisure activities and packages in the rural counties to event organizers, venue operators and event attendees in Sacramento (both onsite and in advance digitally) to emphasize the postconference benefits of extending the itinerary, such as the region’s rejuvenating environment, tranquil surroundings, small town settings and recreational opportunities.
- Track and analyze data on bleisure conversions to help optimize strategies for long-term success.



**Meetings and conventions**

The newly renovated SAFE Credit Union Convention Center in Sacramento features more than 240,000 square feet of programmable space. A new 40,000-square-foot ballroom provides enhanced flexibility for single large groups, as well as capacity for multiple smaller groups to use the facility simultaneously. Separate entrances ensure that each group is self-contained.

By expanding its capacity and facilities, Sacramento’s convention center can now accommodate larger and more events while contributing to job creation, economic growth and increased visibility on a national and international scale. This has the potential to raise the profile of the Gold Country region and attract more visitors, investors and businesses to the area, driving further economic growth and development.

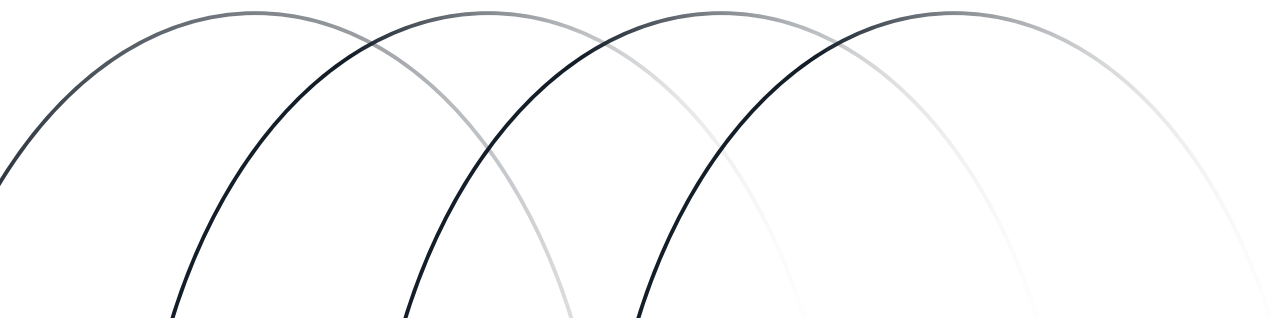
The expanded SAFE Credit Union Convention Center in Sacramento can become a hub/launching point for meeting attendees seeking to explore the rest of the Gold Country through strategic marketing and promotion efforts that raise awareness among event organizers and attendees, through collaboration with DMOs and regional stakeholders such as municipalities and other industry associations, through hosting industry-specific events and forming partnerships with local businesses. Via marketing and awareness initiatives targeting a “captive audience,” i.e., convention attendees pre-, during and post-event, growth in visitation throughout the region can result from attendees expanding their itineraries to include regional destinations. Additionally, like the festival strategy, organizers and the convention center can partner with destinations and stakeholders to enhance their offering with packaged itineraries and add-on/satellite events.

*Key partners*

SAFE Credit Union Convention Center, California Hotel & Lodging Association, Gold Country Bed and Breakfast Association, Placer Valley Tourism, El Dorado County Lodging Association, Tuolumne County Lodging Association, Calaveras Visitors Bureau, Nevada City Chamber of Commerce, Grass Valley Downtown Association, Auburn Old Town Business Association, Placerville Downtown Association, Visit Placer, Visit El Dorado, Visit Tuolumne County, Visit Amador County, Visit Calaveras, Gold Country Visitors Association, California Travel Association, California Lodging Industry Association, Apple Hill, Ironstone Vineyards

*Strategies*

- Offer suggested or packaged leisure itineraries to SAFE Credit Union Convention Center meeting attendees to extend their visit to areas across the region.
- Establish round-trip shuttle services and/or discounted/package rates for attendees traveling from the convention center to other destinations across the region.
- Provide organizers, exhibitors and attendees with comprehensive travel information and assistance to help them navigate transportation options and access the Gold Country region.
- Develop packages including transportation providers and service vendors that simplify the logistics for convention center event organizers and create options for attendees.





## Alternative experiences

While the Gold Country already offers a compelling range of experiences, further investment in expanding experiences and activities can fully unlock its growth potential. The demand driver scorecard results indicated that the Gold Country has the potential to build on its variety of offerings to attract more regional and national demand (see more in the regional research and discovery section). With its history, natural beauty, outdoor adventure, sports and recreation, and craft beverage and culinary experiences, the Gold Country has a strong foundation to widen its geographic reach and enhance the visitor experience. By investing in infrastructure, marketing and collaboration with local communities and tourism stakeholders, the region can enhance existing experiences and create new ones, diversifying its market segments and attracting more visitors.

### *Key partners*

California State Parks, Sierra Nevada Conservancy, Eldorado National Forest, Amador Vintners Association, El Dorado Winery Association, Apple Hill Growers Association, Gold Country Visitors Association, Yosemite Gateway Partners, American River Conservancy, California Gold Rush Trail, Railtown 1897 State Historic Park, Calaveras County Fair & Jumping Frog Jubilee, Bear Valley Mountain Resort, Ironstone Vineyards, Black Chasm Cavern, Columbia Chamber of Commerce, Amador County Chamber of Commerce, El Dorado County Chamber of Commerce, Placer Valley Tourism, Gold Country Fairgrounds, Miwok Tribe, Nisenan Tribe, Washoe Tribe of Nevada and California, Tuolumne Band of Me-Wuk Indians

### *Strategies*

- Incorporate volunteer-based tourism (“voluntourism”) opportunities into the region’s travel offerings, creating enriching experiences for visitors while simultaneously benefiting local communities.
- Structure volunteer programs that align with regional nonprofits’ objectives and connect interested visitors with meaningful volunteer opportunities.
- Identify community development projects in the Gold Country region that would benefit from volunteer assistance, such as environmental conservation, historic preservation, community outreach programs and/or infrastructure development.
- Develop programs that allow voluntourists to engage in hands-on activities aimed at supporting and improving the local community.
  - [Wakamatsu Farm](#) has created a robust volunteer program with a variety of service opportunities.
- Enhance and expand farm-stay programs, offering visitors comfortable lodging combined with authentic agricultural experiences, providing an immersive glimpse into rural life.
- Provide educational experiences for visitors, such as guided tours, hands-on activities and workshops that showcase the farming process and allow guests to engage with agricultural life, such as the [Harvest Tours at Boeger’s at Apple Hill](#).
- Market farm stays as a unique and immersive experience, highlighting the combination of agricultural education, relaxation and luxury.
- Promote ecotourism and nature-based experiences that allow visitors to explore the region’s natural attractions while minimizing their environmental impact.
- Market activities such as guided nature walks, birdwatching tours, wildlife conservation programs and responsible camping or lodging options.
- Develop educational initiatives that raise awareness about conservation efforts, local flora and fauna and the importance of preserving the region’s natural resources.
- Develop authentic cultural experiences that honor Indigenous traditions, languages, storytelling and arts.
  - Any initiatives to encourage visitation to Indigenous sites should be developed in partnership with the local tribe. There should be clear, tribe-sanctioned guidelines communicated to tourists on how to respectfully engage at these sites.
- Develop hands-on workshops during which visitors can learn and practice traditional arts and crafts, such as weaving, carving or beadwork, guided by Indigenous artisans.
- Design guided nature walks highlighting the cultural significance of local plants, animals and landscapes.
- Establish seasonal cultural festivals that showcase traditional music, dance and culinary practices.



# 2 Improve tourism-related transportation infrastructure

The Gold Country encompasses a diverse mix of urban, suburban and rural counties, all of which would benefit from enhanced transportation infrastructure and connectivity. The region faces challenges in providing real-time information about attractions and experiences due to limited cellular and Wi-Fi coverage in rural areas. Additionally, there are deficiencies in wayfinding, signage, digital resources and multimodal connections from parking facilities to town centers (such as the public parking near I-80 in Auburn). Addressing these issues would significantly improve visitor navigation and access to the region’s offerings.

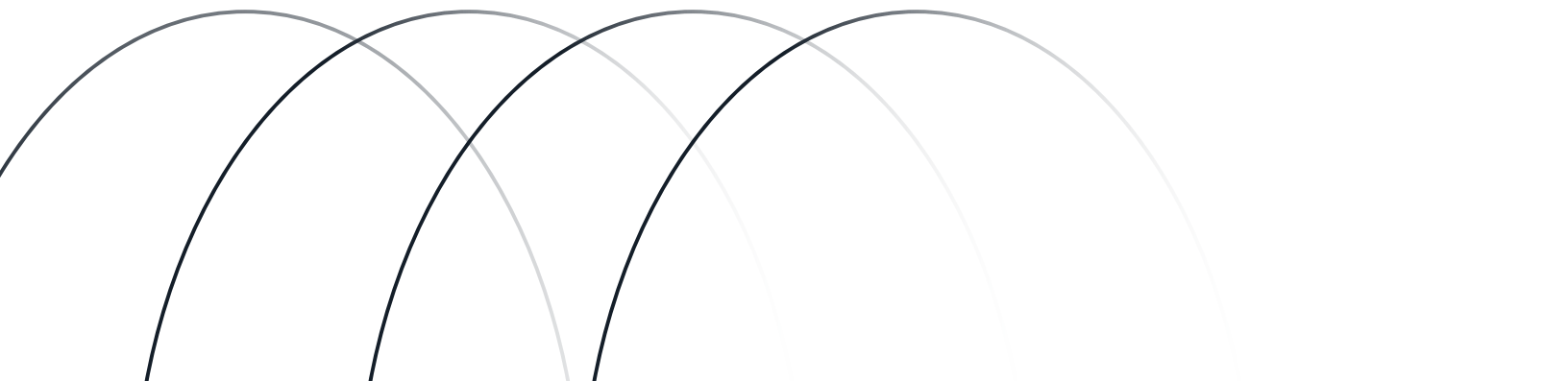
El Dorado County is already proactively addressing transportation issues. Its [Active Transportation Plan](#) prioritizes “improving the quality of life for residents and visitors by making walking and biking more convenient, comfortable, healthy and safe modes of transportation.” Additionally, the county Transportation Commission has begun work on the [2025-2045 Regional Transportation Plan](#), “designed to be a guide for the systematic development of a balanced, comprehensive, multi-modal transportation system.”

### Key partners

Nevada County Transportation Commission, Placer County Transportation Planning Agency, El Dorado County Transportation Commission, Amador County Transportation Commission, Calaveras Council of Governments, Tuolumne County Transportation Council, Counties and Local Governments, Regional and County-Level Transportation Authorities, Chambers of Commerce and Business Associations, DMOs

### Strategies

- Develop a comprehensive wayfinding and signage system (e.g., roadways, parking lots and Sacramento airport) to enhance accessibility and awareness of attractions, hotels and small towns.
- Develop multimodal paths between points of interest across the region as well as between parking areas and key attractions/amenities within towns, to enhance accessibility and provide opportunities for outdoor recreation (e.g., biking). An example of such a development is the [Jedediah Smith Memorial Trail](#) stretching 32 miles from Sacramento to Folsom along the American River, used by visitors and residents alike.
  - Sacramento’s [Livability Strategy](#) seeks to “make downtown multi-modal and exceptionally walkable.” Options for similar strategies exist between and within the historic towns of the Gold Country’s rural counties.
- Design a website application for guided tours and interactive experiences.





# 3 Support workforce development

The Gold Country’s tourism sector grapples with workforce challenges necessitating tailored solutions. Key issues include lengthy commute times due to a severe shortage of affordable housing that impacts the local labor pool available for tourism-related jobs.

To address these specific regional challenges, key stakeholders can develop targeted strategies that address the affordability of housing, create pathways for career growth and advancement within the tourism sector and develop initiatives to mitigate the impact of seasonality on employment.

There is also an opportunity for the Gold Country to further advance diversity, equity and inclusion in the tourism workforce to enhance the region’s reputation as an attractive, welcoming destination for a variety of visitors and a great place to live and work.

## Key partners

California Hotel & Lodging Association, California Travel Association, Columbia College, Sierra College, Folsom Lake College, Amador Community Foundation, El Dorado Community Foundation, Placer Community Foundation, Tuolumne County Economic Development Authority, El Dorado County Economic Development Division, Placer County Economic Development Office, Alliance for Workforce Development, El Dorado County Chamber of Commerce Diversity Business Council, Placer County Office of Economic Development and Business Resource Center

## Strategies

- Create opportunities for career progression and retention within the tourism sector (e.g., training, professional development), increasing workforce availability and mitigating the effects of seasonality on employment.
- Increase awareness of the diverse career opportunities in the tourism industry through targeted marketing and outreach efforts (e.g., career fairs).
- Develop apprenticeship and training programs and internships to provide hands-on experience and career pathways in the tourism sector such as the Tourism Diversity Matters Apprenticeship Program.
- Develop training and resources that support diversity and inclusion in the workplace, focusing on cultural sensitivity, unconscious bias and fostering an inclusive work environment.
- Implement recruitment strategies that target underrepresented groups and ensure equal opportunities for employment in the tourism industry.
- Establish mentorship programs and networking opportunities that foster support and growth for diverse individuals in the tourism workforce.
- Regularly assess and address the barriers and challenges faced in promoting diversity and inclusivity within the tourism sector and adapt recruitment and retention efforts accordingly.

# 4 Enhance regional marketing and messaging

The region has a unique and diverse array of historic and natural assets that rival its in-state competitors. Air access to the region is via Sacramento International Airport. Market challenges stem from limited awareness of the Gold Country as a vibrant destination, limited visitor diversity and capture of new or underrepresented market segments and relatively low DMO funding.

Despite its diverse and abundant offerings and world-class recreational opportunities (e.g., white water rafting), as well as proximity to a mid-sized international airport, the Gold Country is primarily a pass-through destination for visitors en route to Lake Tahoe or Yosemite and a day-trip market for residents of Sacramento and its surrounding suburbs.

To grow, it is important that the region create a multipronged strategy for expansion and diversification of the tourism market that transforms the Gold Country from a pass-through destination and day-trip market into a full-fledged tourism destination, attracting overnight visitors, extending length of stay and positioning the Gold Country as a desirable overnight destination.

## Key partners

Visit Tuolumne County, El Dorado County Visitors Authority, Placer County Visitors Bureau, Amador County Tourism Council, Columbia State Historic Park, Marshall Gold Discovery State Historic Park, Empire Mine State Historic Park, Railtown 1897 State Historic Park, Black Chasm Cavern, Calaveras Big Trees State Park, Amador Transit, El Dorado County Transit Authority, Amador Vintners Association, El Dorado Winery Association, Tuolumne County Historical Society

## Strategies

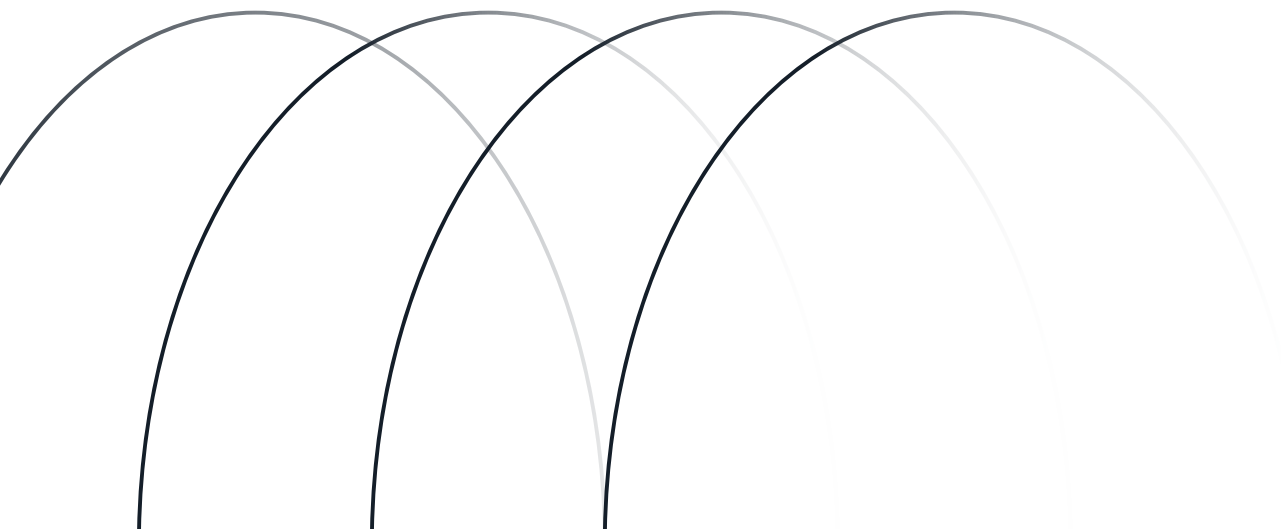
- Broaden geographic markets to include Southern California, international travelers already visiting Lake Tahoe or Yosemite and drive-to markets in bordering states, as well as segments such as off-peak groups, events and festivals, and regionwide sports tournaments (e.g., cycling).
- Expand the marketing narrative to include emotional connections around themes like adventure, culture and heritage without diluting the core Gold Rush narrative that is so central to the region's identity.
- Use digital marketing strategies to promote the Gold Country to a wider audience and enhance online presence, social media campaigns and user-friendly websites to attract and engage potential visitors.
- Prioritize outdoor experiences as an anchor for the destination, focusing on the variety and quality of outdoor activities and attractions, such as Calaveras Big Trees and whitewater rafting on the American and Yuba rivers.
- Elevate and highlight the region's historic small-town character and culture as differentiators.
- Conduct research and gather data on the experiences and needs of diverse travelers to create storytelling and interpretation that engages tourists with authentic and inclusive experiences.
- Reframe the narrative beyond the Gold Rush to showcase the region's diverse themes (farm-to-fork, wine, beer and cider, natural assets, recreation, etc.), cultural offerings and multilayered history and heritage incorporating the experiences of immigrants and Indigenous peoples.
- Promote the region's unique food and beverage offerings, including farm-to-table experiences, wineries, breweries and culinary events to attract food and wine enthusiasts and enhance the overall visitor experience.
- Highlight the opportunities for outdoor adventure and recreation in the region, such as hiking, biking, fishing, rafting and zip-lining, and promote adventure packages and itineraries to cater to outdoor enthusiasts and thrill-seekers.
- Highlight the region's multilayered history and cultural offerings, such as the multi-panel mural in Sacramento's Southside Park painted in 1977 by members of the Royal Chicano Air force, a longtime Sacramento group of Chicano artists and activists.



# 5 Promote community engagement and balance

Community resistance to tourism and development is pervasive in some rural areas of the Gold Country and has resulted in limited development of product and related infrastructure improvements, as well as limited funding for tourism initiatives. On average, only 43% of the Gold Country respondents to Visit California’s Community Sentiment Study think that their local community’s tourism industry results in a better quality of life for them and their family and only 48% of the residents agree that tourism’s benefits outweigh its problems. According to discussions with industry stakeholders, community resistance, particularly in areas like El Dorado, Nevada and Amador counties, often stems from several factors:

- Overuse of natural resources: concern about the strain on water, forests and wildlife caused by increasing visitor numbers.
- Wildfire risk: increased risk of fire in rural areas due to campfires, off-road vehicles or improper disposal of smoking materials.
- Road congestion: especially in the smaller towns during peak seasons or during popular events.
- Preservation of small-town character: fear that commercialization will erode the historic charm, unique character and rural lifestyle of small towns and cause a shift away from the community’s slow-paced, peaceful environment.
- Uneven benefits: perception that the economic benefits of tourism primarily serve outside investors, or only a small portion of local residents.
- Job quality: belief that tourism jobs are often seasonal or low-wage.
- Visitor behavior: overcrowding at popular sites, as well as disrespectful behavior from tourists who may not understand local customs or respect the environment.
- Increased waste and pollution: more litter, pollution and a greater need for waste management.



*Key partners*

Local Chambers of Commerce, Amador County Business Council, El Dorado County Economic Development Advisory Committee, Placer Collaborative Network, counties and local government, Gold Country Visitors Association, Visit Placer, El Dorado County Chamber of Commerce, Amador County Chamber of Commerce, Tuolumne County Visitors Bureau, Calaveras Visitors Bureau, Auburn Chamber of Commerce, Grass Valley Chamber of Commerce, Nevada City Chamber of Commerce, Nevada County Economic Resource Council

*Strategies*

- Coordinate and promote community engagement programs with a focus on strengthening relations between visitors, the tourism industry and residents, with the level of engagement adaptable to the unique dynamics and concerns of each local community.
  - A best-in-class example is Placer County’s [Critical Success Factors/Strategic Plan Dashboard](#), a holistic community-oriented plan for sustainable economic growth that is focused on identifying “opportunities to work proactively and collaboratively with our community members, business sector, municipalities and regional partners on areas of common interest ... and support efforts that will improve transparency of service delivery and encourage open dialogue and two-way communication for the benefit of all county residents.”
- Address resident concerns around perceived overcrowding and infrastructure challenges by highlighting the potential positive impact of tourism on job creation, revenue generation and community development.
- Leverage research and resources offered by Visit California to emphasize how tourism can uplift the regional and local economies, support small businesses, create employment opportunities and contribute funding for infrastructure and other community-facing projects.
  - Visit California regularly releases detailed [reports](#) — such as the Monthly Travel Indicators Summary, California Regional Lodging Forecast and the Economic Impact of Travel in California 2014-2023 — outlining the economic contributions of tourism to the state’s economy, including visitor spending, job creation and state and local tax revenue generated from tourism.
- Solicit feedback from local businesses, community organizations and residents in tourism development planning from the outset, so they are active participants in shaping the regional tourism industry.
- Hold public forums, workshops and roundtable discussions where local businesses and community organizations can voice their opinions and provide input on tourism strategies and plans.
- Establish mutual goals for economic growth, sustainability and preserving local culture that both businesses and community groups can rally around.
- Feature local businesses, historical landmarks, cultural events and festivals in marketing material.
- Create opportunities for community groups and businesses to share in tourism revenue through local events, markets or community-based projects.



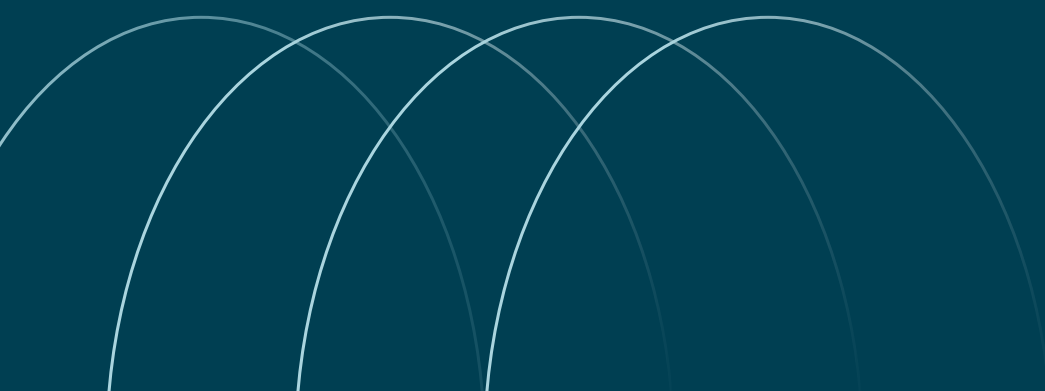
# Conclusion

The Gold Country Regional Opportunities initiative represents a crucial milestone in our collaborative effort to strengthen and sustain the region’s tourism industry. This comprehensive plan, crafted through extensive community engagement, in-depth research and strategic assessment, identifies key opportunities to guide Gold Country toward a more vibrant, sustainable and economically prosperous future.

The development process has been marked by dedication, innovation and a shared vision among diverse stakeholders. Input from a wide array of partners — including DMOs, economic development agencies, cultural organizations, transportation authorities and sustainability groups — has shaped a plan that is both ambitious and feasible.

Core priorities are supported by actionable strategies, going beyond mere planning to embody a more sustainable future for Gold Country’s tourism sector. While challenges may arise, the road ahead offers significant opportunities for growth, innovation and positive change. By staying true to the region’s vision and values, Gold Country can exceed expectations and become a model for sustainable tourism development.

The project team expresses deep appreciation to all who devoted their time, knowledge and enthusiasm to this endeavor. Your participation has been essential in crafting strategies that genuinely mirror the Gold Country’s needs and aspirations.



# Appendix

## Regional advisory committee members

JLL extends its heartfelt appreciation to the entire Visit California team, the dedicated members of the regional advisory committee, as well as the stakeholders and partners across the community who actively participated in the Regional Strategic Tourism Planning process for Gold Country. Without their unwavering support and commitment, this plan would not have been possible. Thank you all for your contributions.

Name	Organization
Eliza Tudor	Nevada County Arts Council
Jocelyn Maddux	Placer Wine and Ale Trail
Tracey Berkner	Taste Restaurant & Wine Bar, Rest
Martin Huberty	Calaveras Visitors Bureau
Aaryn Val	Explore Elk Grove
Rob Haswell	Visit Placer
Kim Summers	Placer Valley Tourism
Marc Sapoznik	Visit Rancho Cordova
Sonya Bradley (Mike Testa)	Visit Sacramento
Lisa Mayo	Visit Tuolumne County
Jody Franklin	El Dorado County Visitors Authority
Sally Buchanan	Choose Folsom
Kimberly Parker (Erika Seward)	County of Nevada
Gloria Stearns	Placer County Economic Development
Madelyn Bussola (Michael Ault)	Downtown Sacramento Partnership
Megan Van Voorhis	City of Sacramento
Melissa Lobach	American River Conservancy
Doug Warren	Courtyard By Marriott Sacramento Cal Expo
Tim Woolslayer	Hilton Sacramento Arden West
Michael Wackman	McConnell Estates Winery
Barry Smith	California State Parks, Gold Fields District



# Engaged destination marketing organizations and convention and visitors bureaus

JLL extends its sincere thanks to the destination marketing organizations and convention and visitors bureaus whose partnership and expertise were essential to the success of this project. Their insights into local tourism landscapes and their commitment to collaboration were invaluable.

Organization
Calaveras Visitors Bureau
Choose Folsom
Explore Elk Grove
El Dorado County Visitors Authority
Placer Valley Tourism
Visit Amador
Visit Placer
Visit Rancho Cordova
Visit Sacramento
Visit Tuolumne County



# Destination plans review database

A review of the following existing regional plans was conducted to establish context and identify key priorities and available resources for this project:

City/County	Name of plan	City/County	Name of plan
Amador	Amador County General Plan	Marysville	Strategic Plan 2021 – 2025
Angels Camp	Angels Camp 2020 General Plan	Nevada	Nevada County Recreation and Resiliency Master Plan,
Auburn	City of Auburn 2022-2025	Nevada	Recreation and Resiliency Master Plan
Citrus Heights	Citrus Heights General Plan	Nevada City	Nevada City General Plan
Colfax	Outline General Plan 1990	Placer	Placer County’s Strategic Plan
El Dorado	El Dorado County Active Transportation Plan	Placerville	General Plan Policy Document
El Dorado	Regional Transportation Plan 2025-2045	Placerville	City of Placerville Strategic Plan
Elk Grove	General Plan	Plymouth	The Plymouth General Plan
Folsom	Folsom General Plan 2035	Rancho Cordova	Rancho Cordova General Plan
Galt	City of Galt General Plan Update: 2030	Rocklin	City of Rocklin General Plan
Grass Valley	City of Grass Valley 2020 General Plan	Roseville	City of Roseville General Plan
Ione	City of Ione General Plan	Sacramento	Sacramento 2035 General Plan
Isleton	City of Isleton General Plan 2000	Sacramento	Downtown Sacramento Partnership Strategic Action Plan
Jackson	City of Jackson Energy Action Plan	Sacramento	Livability Strategy
Lincoln	City of Lincoln General Plan	Sonora	City of Sonora General Plan 2020
Loomis	General Plan 2020–2040	Sutter Creek	General Plan



# Focus group attendees

JLL extends its sincere gratitude to all the focus group participants, whose valuable insights and contributions were essential to the development of this plan. Your time and expertise are deeply appreciated.

Name	Organization
Aaron James	USDA, Stanislaus National Forest
Aaryn Val	Explore Elk Grove
Alisha Scully	Sacramento Marriott Rancho Cordova
Amanda Norton	City of Rancho Cordova
Andrea Canterbury	Quarry Park Adventures
Anne Brown	Auburn Symphony
Annie Bowler	Visit Placer Board of Directors
April Potter	American River Parkway Foundation
Ava Keck	Placer County
Barry Smith	California State Parks, Gold Fields District
Bonnie Kelley	Ponderosa Ridge
Brad Barnard	Amador County Chamber of Commerce
Brian Clausman	Global Products Group
Carlos Geisdorff	Tuolumne Band of Me-Wuk Indians
Cherri Spriggs	Placer Business Alliance
Cheryl Gleason	Cordova Community Council
Chris Delfino	Apple Hill Growers Association
Chris Earl	Governor's Office of Business and Economic Development
Chris Gallardo	Inland Surf Company
Chris Lott	Sacramento Marriott Rancho Cordova
Cindi Dulgar	Sacramento State Aquatic Center
Cindy Nichol	Sacramento County
Cleve Morris	City of Placerville
Clifton Taylor	Taylor Builders
Clyde and Nancy Nash	Independent
Dan Bolster	El Dorado County Transportation Commission
Dan Crandall	Current Adventures
Danielle Vinson	Heart Craft Studio
Danna Stroud	Governor's Office of Business and Economic Development
Darin Grossi	Tuolumne County Transportation Council and Transit Agency
Darrell Doan	City of Elk Grove
Dawn Hall	Visit Rancho Cordova
Debi Best	The Ridge Golf Course
Denise Pane	Access Design Studio
Devin Swartwood	California State Parks

<b>Name</b>	<b>Organization</b>
Diann Rogers	Rancho Cordova Area Chamber of Commerce
Dianna Poggetto	American River Parkway Foundation
Don Barth	Moaning Caverns
Donna Dotti	Placer Valley Tourism
Doug Warren	Courtyard by Marriott Sacramento Cal Expo
Elaine Andersen	City of Folsom
Elisabeth Barton	Echo Adventure Cooperative
Eliza Tudor	Nevada County Arts Council
Enid Baldock	Hampton Inn & Suites Folsom
Eric Barbaro	Chicken Ranch Casino
Erika Seward	Nevada County
Gloria Stearns	Placer County
Gloria Wright	Palladio at Broadstone
Heidi Lupo	Pinecrest Expedition Academy
Heidi Wilder	Fort Rock Brewing
James Marquez	Center Street Gallery
Jamie Hazen	Downtown Roseville Board
Janet Zeller	Soil Born Farms
Jaron Brandon	Tuolumne County
Jason Jacobs	Sacramento Zoo
Jeff Meader	Placerville News Company
Jeff Michels	Sierra Nevada Hospitality
Jeff Nereson	City of Roseville
Jeff Richardson	Westfield Galleria at Roseville
Jenna Hoyt	Holiday Inn Express & Suites El Dorado Hills
Jessica Gonzalez	Sacramento Regional Transit
Jill Nunes	Cordova Recreation & Park District
Jocelyn Maddux	Placer Wine & Ale Trail
Jody Franklin	El Dorado County Visitor's Authority
Joe Gagliardi	Choose Folsom
Joey Penneman	SMUD
John Fett	Lincoln Economic Development Committee
John Neumann	Neumann Limo
Judy Collinsworth	Folsom Historic Distric Association
Karen Warburton	Amador County
KathE Frazier	Gold Miners Inn
Kent Hansen	American River Raft Rentals



<b>Name</b>	<b>Organization</b>
Kim Stoll	Shingle Springs Band of Miwok Indians
Kim Summers	Placer Valley Tourism
Kimberly Parker	Nevada County
Kristin Goble	Residence Inn Rancho Cordova
Kyle Zimbelman	El Dorado County
Kyra Johnson	Independent
Laura Fickle	Choose Folsom
Laurel Brent-Bumb	El Dorado County Chamber of Commerce
Lauryl Hernandez	Hyatt Place Sacramento/Roseville
Len Otley	Independent
Leonard Grado	Palos Verdes Properties
Linda Quinones-Vaughan	Governor's Office of Business and Economic Development
Lisa Mayo	Visit Tuolumne County
Madelyn Bussola (Michael Ault)	Downtown Sacramento
Marc Sapoznik	Visit Rancho Cordova
Mariann Eitzman	Los Rios Community College District
Martin Huberty	Calaveras Visitors Bureau
Mary Cory	El Dorado County Historical Museum
MaryTess Mayall	Blue Line Arts
Mason Antonucci	Smith Flat House
Matina Kolokotronis	Sacramento Kings
Matt Garcia	The Branch Twain Harte
Megan Van Hook	Amador Vintners Association
Megan Van Voorhis	City of Sacramento
Meghan O'Keefe	Amador County Arts Council
Melissa Eads	City of Sonora
Melissa Lobach	American River Conservancy
Mercedes Tune	Independent
Michael Tooley	Tooley Oil
Michael Wackman	McConnell Estates Winery
Michelle Janzen	J.J. Pfister
Michelle Peterson	Dust Bowl Brewing
Mike Testa	Visit Sacramento
Monique Brown	Growth Factory
Nate Rangel	California Outdoors
Nicole Shebl	Visit Amador
Poonum Patel	Governor's Office of Business and Economic Development
Quoc Nham	City of Rancho Cordova
Quincy Yaley	Tuolumne County
Rana Ghadban	Roseville Area Chamber of Commerce

<b>Name</b>	<b>Organization</b>
Rebecca Collins	Hotel Sutter
Rebecca Stoddard	Boeger Winery
Rita Mukherjee Hoffstadt	Folsom History
Rob Haswell	Visit Placer County
Ron Kopf	Tuolumne County Business Council
Rosanna Sharps	Columbia Booksellers & Variety Store
Sally Buchanan	Choose Folsom
Samantha Mott	Sacramento County
Scott Armstrong	All-Outdoors California Whitewater Rafting
Seth Norris	Helwig Winery
Sharon Stone Smith	Sacramento Kids
Shelly Blanchard	Cordova Community Council
Sherri Conway	City of Rocklin
Shivi Sharma	Independent
Sonya Bradley	Visit Sacramento
Stacy Paragary	Paragary Restaurant Group
Stephanie Sanchez	Independent
Stephen Kautz	Ironstone Vineyards
Stephen Suderman	Governor's Office of Business and Economic Development
Suzanne Cook	Scott's Seafood Roundhouse
Teri Marshall	Evergreen Lodge, Rush Creek Lodge & Spa
Terry LeMoncheck	Arts and Culture El Dorado
Tim Woolslayer	Hilton Sacramento Arden West
TimBen Boydston	Canyon Theater Guild
Tina Oh	City of Los Angeles
Todd Goldstein	AEG
Todd Metzger	Springboard Hospitality
Tom Crosby	Independent
Tony Palermo	Tony P's Dockside Grill
Tracey Berkner	Taste Restaurant & Wine Bar, Rest
Vanessa Phillips	Highgate
Wayne Wiley	City of Roseville
Wendy Thomas	El Dorado County
Willie Johnson	Highgate



# Stakeholder interviewees

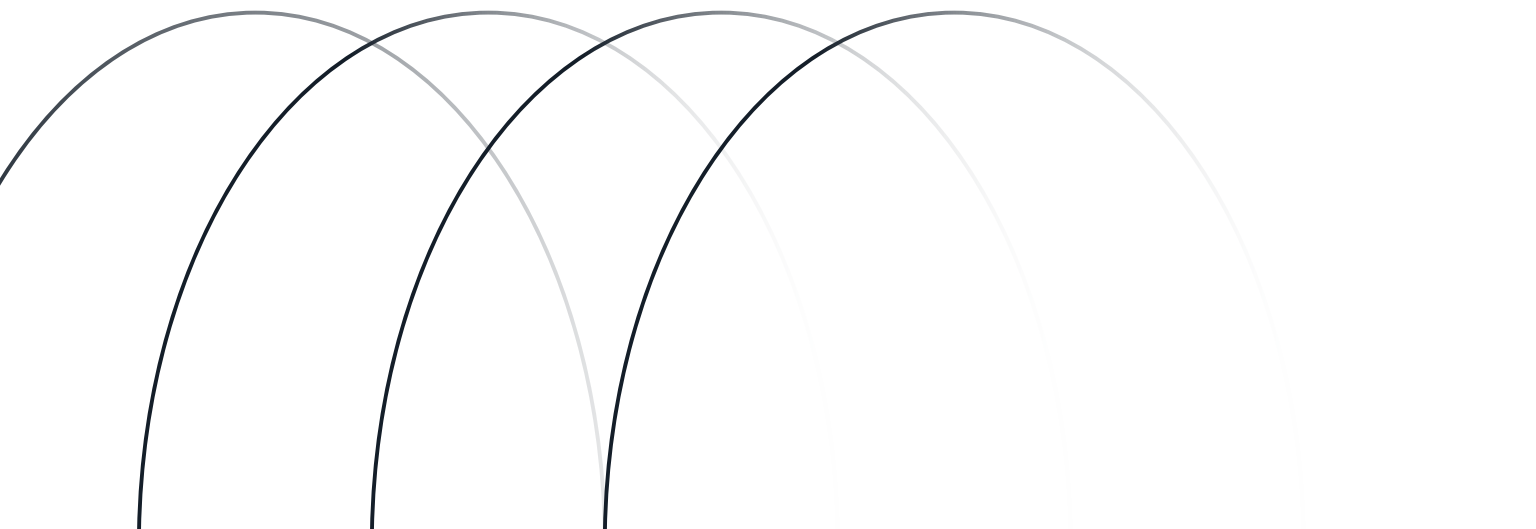
JLL expresses its sincere thanks to stakeholders and interviewees for their collaborative spirit and willingness to share their knowledge. Their partnership was invaluable in achieving the goals of this project.

Name	Organization
Aaron James	USDA, Stanislaus National Forest
Aaryn Val	Explore Elk Grove
Amanda Norton	City of Rancho Cordova
Anne Brown	Auburn Symphony
Annie Bowler	Visit Placer Board of Directors
Ava Keck	Placer County
Barry Smith	California State Parks, Gold Fields District
Brad Barnard	Amador County Chamber of Commerce
Carlos Geisdorff	Tuolumne Band of Me-Wuk Indians
Casey Fabbri	Explore Elk Grove
Cherri Spriggs	Placer Business Alliance
Cheryl Gleason	Cordova Community Council
Chris and Larry Parker	Courtwood Inn
Chris Delfino	Apple Hill Growers Association
Chris Earl	Governor's Office of Business and Economic Development
Chris Lott	Sacramento Marriott Rancho Cordova
Cindi Dugar	Sacramento State Aquatic Center
Clair Whitmer	Governor's Office of Business and Economic Development
Dan Bolster	El Dorado County Transportation Commission
Danielle Vinson	Heart Craft Studio
Danna Stroud	Governor's Office of Business and Economic Development
Darin Grossi	Tuolumne County Transportation Council and Transit Agency
Darrell Doan	City of Elk Grove
Dave Horner	Visit Amador
Dawn Hall	Visit Rancho Cordova
Devin Swartwood	California State Parks
Dianna Poggetto	American River Parkway Foundation
Donna Dotti	Placer Valley Tourism
Doug Warren	Courtyard by Marriott Sacramento Cal Expo
Elaine Andersen	City of Folsom
Eliza Tudor	Nevada County Arts Council
Heather Heckler	Nevada County Arts Council
David Holland	Creative West
Eric Barbaro	Chicken Ranch Casino
Erika Seward	Nevada County
James Marquez	Center Street Gallery

<b>Name</b>	<b>Organization</b>
Janet Zeller	Soil Born Farms
Jeff Meader	Placerville News Company
Jeff Richardson	Westfield Galleria at Roseville
Jenna Hoyt	Holiday Inn Express & Suites El Dorado Hills
Jessica Gonzalez	Sacramento Regional Transit
Jocelyn Maddux	Placer Wine and Ale Trail
Jody Franklin	El Dorado County Visitor's Authority
Joe Gagliardi	Choose Folsom
Karen Warburton	Amador County
KathE Frazier	Gold Miners Inn
Kevin "Coop" Cooper	Bear Valley Ski Resort
Kim Stoll	Shingle Springs Band of Miwok Indians
Kim Summers	Placer Valley Tourism
Kimberly Parker	Nevada County
Kyle Zimbelman	County of El Dorado, Economic Development
Kyra Johnson	Independent
Laura Fickle	Choose Folsom
Laurel Brent-Bumb	El Dorado County Chamber of Commerce
Linda Quinones-Vaughan	Governor's Office of Business and Economic Development
Lisa Mayo	Visit Tuolumne County
Madelyn Bussola (Michael Ault)	Downtown Sacramento
Marc Sapoznik	Visit Rancho Cordova
Mariann Eitzman	Los Rios Community College District
Martin Huberty	Calaveras Visitors Bureau & Film Commission
Mary Cory	El Dorado County Historical Museum
MaryTess Mayall	Blue Line Arts
Megan Van Hook	Amador Vintners Association
Megan Van Voorhis	City of Sacramento
Meghan O'Keefe	Amador County Arts Council
Melissa Eads	City of Sonora
Melissa Lobach	American River Conservancy
Mercedes Tune	Independent
Michael Wackman	McConnell Estates Winery
Michelle Janzen	J.J. Pfister
Michelle Peterson	Dust Bowl Brewing
Mike Testa	Visit Sacramento
Monique Brown	Growth Factory



Name	Organization
Nate Rangel	California Outdoors
Nicole Shebl	Visit Amador
Paul Prescott	Calaveras Big Trees Association
Poonum Patel	Governor's Office of Business and Economic Development
Quoc Nham	City of Rancho Cordova
Rana Ghadban	Roseville Area Chamber of Commerce
Rebecca Collins	Hotel Sutter
Rita Mukherjee Hoffstadt	Folsom History
Rob Haswell	Visit Placer County
Sally Buchanan	Choose Folsom
Shelly Blanchard	Cordova Community Council
Sherri Conway	City of Rocklin
Shivi Sharma	Independent
Sonya Bradley	Visit Sacramento
Stephen Kautz	Ironstone Vineyards
Stephen Suderman	Governor's Office of Business and Economic Development
Suzanne Cook	Scott's Seafood Roundhouse
Teri Marshall	Evergreen Lodge
Terry LeMoncheck	Arts and Culture El Dorado
Tiffany McKenzie	Visit Placer County
Tim Woollayer	Hilton Sacramento Arden West
Tom Crosby	Comcast
Tracey Berkner	Taste Restaurant & Wine Bar, Rest
Wayne Wiley	City of Roseville



# Visited points of interest

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

Attraction	Location
Angels Camp Museum and Carriage House	Angels Camp
Calaveras Big Trees State Park	Arnold
Old Town Auburn	Auburn
Knight Foundry	Auburn
Historic Courthouse	Auburn
Apple Hill Experience	Camino
California Cavern State Historic Landmark	Cave City
Marshall Gold Discovery State Historic Park	Coloma
Columbia State Historic Park	Columbia
Elk Grove Aquatics Center	Elk Grove
Sky River Casino	Elk Grove
The Center at District 56	Elk Grove
Folsom Lake State Recreation Area	Folsom
Lake Natoma	Folsom
Town of Grass Valley	Grass Valley
North Star Mining Museum	Grass Valley
The Center for the Arts	Grass Valley
Baker Street West	Jackson
Railtown 1897 State Historic Park	Jamestown
Kennedy Gold Mine	Jamestown
Hidden Falls Regional Park, Lincoln	Lincoln
Mokelumne Hill	Mokelumne Hill
Ironstone Vineyards	Murphys
Mercer Caverns	Murphys
Courtwood Inn and Suites	Murphys
Town of Murphys	Murphys
Lake Pardee	Near Angels Camp
Lake Clementine	Near Auburn



Folsom Lake



# Visited points of interest

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

Attraction	Location
South Yuba River State Park	Nevada City
Malakoff Diggins State Historic Park	Nevada City
Town of Nevada City	Nevada City
Town of Placerville	Placerville
Gold Bug Park & Mine	Placerville
Roebbelen Center	Roseville
Golden 1 Center	Sacramento
State Capitol Building	Sacramento
Sacramento Zoo	Sacramento
Sacramento State Aquatic Center	Sacramento
Tower Bridge	Sacramento
American River Bicycle Trail	Sacramento
Old Sacramento	Sacramento
Sacramento History Museum	Sacramento
California State Railroad Museum	Sacramento
Southside Park	Sacramento
Historic Town of Sonora	Sonora
Indigeny Reserve (Cidery)	Sonora
Coffill Park	Sonora
Town of Sutter Creek	Sutter Creek
Baiocchi Wines and Vineyards	Sutter Creek
Bella Grace Vineyards	Sutter Creek
Sutter Creek Theatre	Sutter Creek
Moaning Caverns	Vallecito
American River State Recreation Area	Various
Highway 49 Road Trip	Various
Stanislaus National Forest	Various
Indian Grinding Rock State Historic Park	Volcano



Golden 1 Center, Sacramento

# Global destinations’ readiness for sustainable tourism

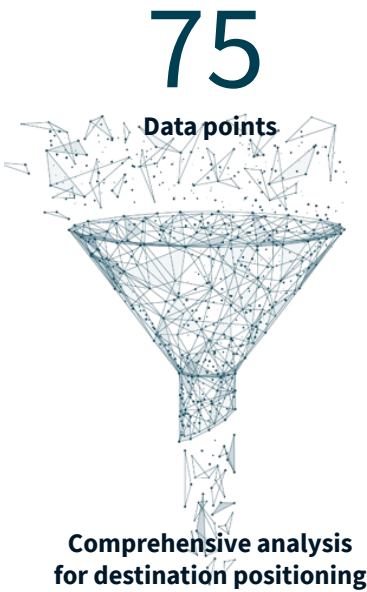
- Tourism readiness index is the product of a partnership between JLL and the World Travel & Tourism Council to assess global cities’ tourism readiness.
- While readiness will depend on the ambitions and goals of every city, WTTC & JLL define tourism readiness as a strategic and all-inclusive approach that proactively addresses and implements factors and policies relating to scale, concentration, leisure and business offerings, environmental and urban readiness, safety and security as well as the prioritization of tourism.
- Indeed, no two destinations are better than one another or the same and, as such, the challenges they will face, and the opportunities to unlock their tourism potential, will differ.
- However, commonalities can be identified to provide a framework through which cities can assess their context and plan for the future.

## Tourism readiness index

- Comprehensive analysis addresses what makes a destination ready for sustainable travel and tourism.
- Assess current positioning and ability to manage growth
- Indicators | 75 data points across all facets of the tourism economy
- Outcomes | eight categories and five destination typologies



Globally recognized tool validated by over 100 domestic and international destinations and the World Travel & Tourism Council



### Tourism readiness index categories

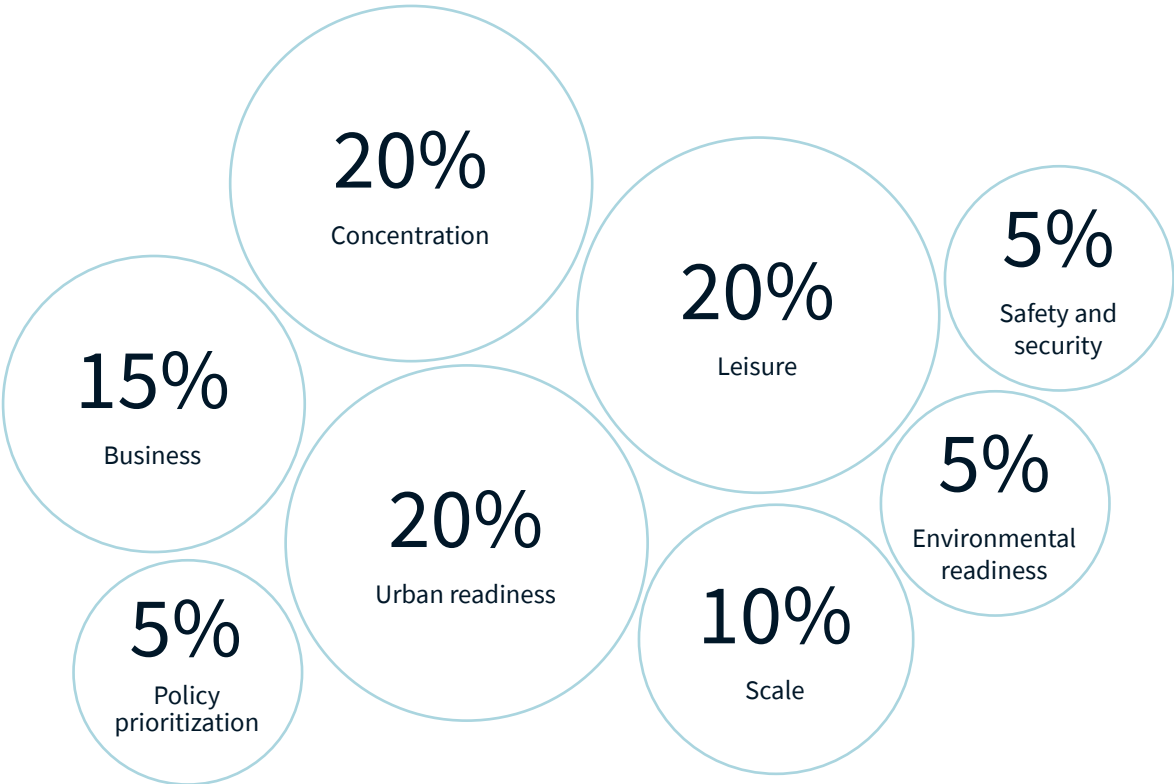
- |                            |                          |
|----------------------------|--------------------------|
| 1. Scale                   | 5. Concentration         |
| 2. Leisure                 | 6. Business              |
| 3. Environmental readiness | 7. Urban readiness       |
| 4. Safety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



Levels of readiness | Destination typologies

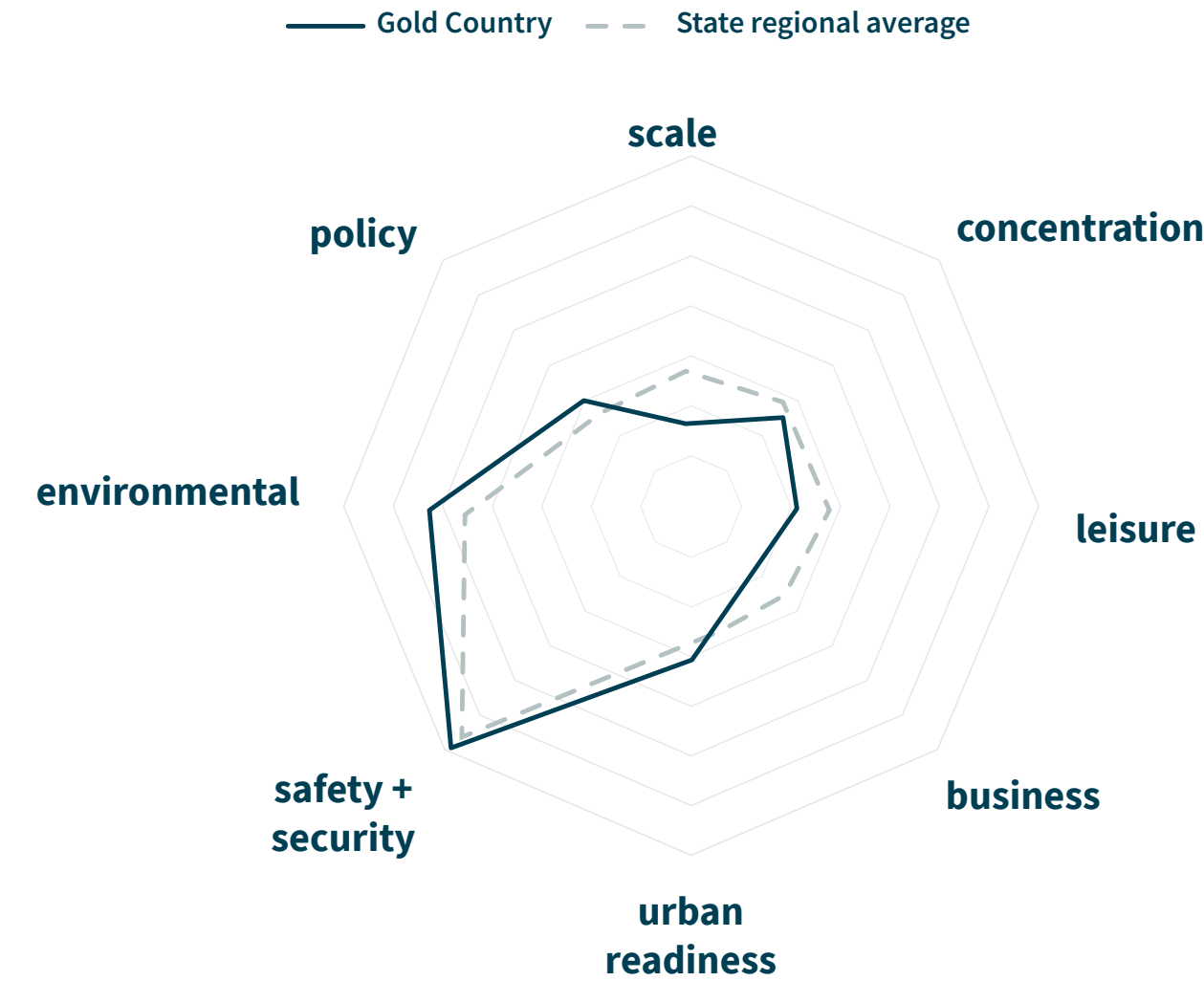
Dawning Developers	Emerging Performers	Balanced Dynamics	Mature Performers	Managing Momentum
Limited tourism infrastructure	Growing momentum	Established infrastructure	Strong leisure and/or business travel dynamics	Historically high growth momentum
Gradual tourism growth	Rising infrastructure	Growth in business and leisure paces with scale	Established tourism infrastructure	Aging or strained tourism infrastructure
Opportunities ahead with planning	Opportunities for strategic development	Equalized scale and concentration	Proactively manage pressures and capacity building	Feeling the pressures of scale and concentration
	Smaller scale — may experience pressures			

Weights by category



# Gold Country results

## Outcome by pillar





# Demand driver scorecard

## Process — multistep assessment of destination assets



Utilize visitor traffic and flow data to assess current demand



Place individual assets on scale based on eight criteria to score



Rate anything that is a 6-7 or greater as the region’s attractors



Utilize the outcome to identify future competitive positioning



Recommend new investment or enhancement to grow assets on the scale

## Score Card Elements

Item	Definition	Max point value
One of a kind	Captivating content or collections that drives interest and appeal Proximity of alternative similar offerings can be a factor in overall uniqueness	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy— trying to capture a moment)	20
Engaging visitor experience	Interaction between the guest and the attraction	15
Current visitor demand	Level of visitor traffic, reviews, etc., to the asset currently	15
Event opportunities	Programming temporal, catalytic events	10
Venue capabilities	Easily transformed and adapted to host various functions	5
Identified target audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5
Future unique development	Upcoming additions or plan initiatives that elevate potential	5

**Score Card: Eiffel Tower sample scoring**

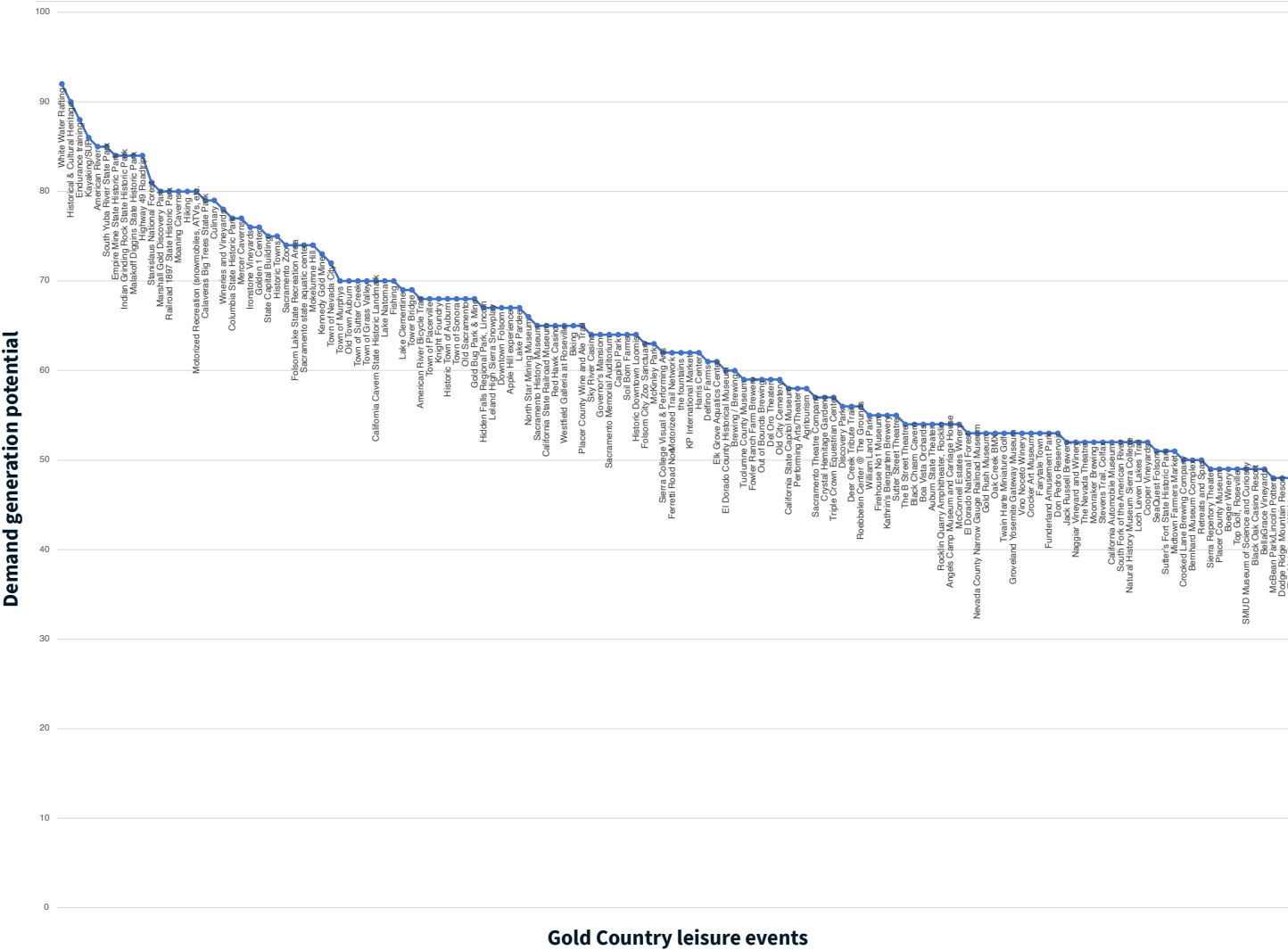
Item	Definition	Score	Max point value
One of a kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness.	25	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy — trying to capture a moment)	20	20
Engaging visitor experience	Interaction between the guest and the attraction	15	15
Current visitor demand	Level of visitor traffic, reviews, etc., to the asset currently	15	15
Event opportunities	Programming temporal, catalytic events	10	10
Venue capabilities	Easily transformed and adapted to host various functions	5	5
Identified target audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5	5
Future unique development	Upcoming additions or plan initiatives that elevate potential	5	5



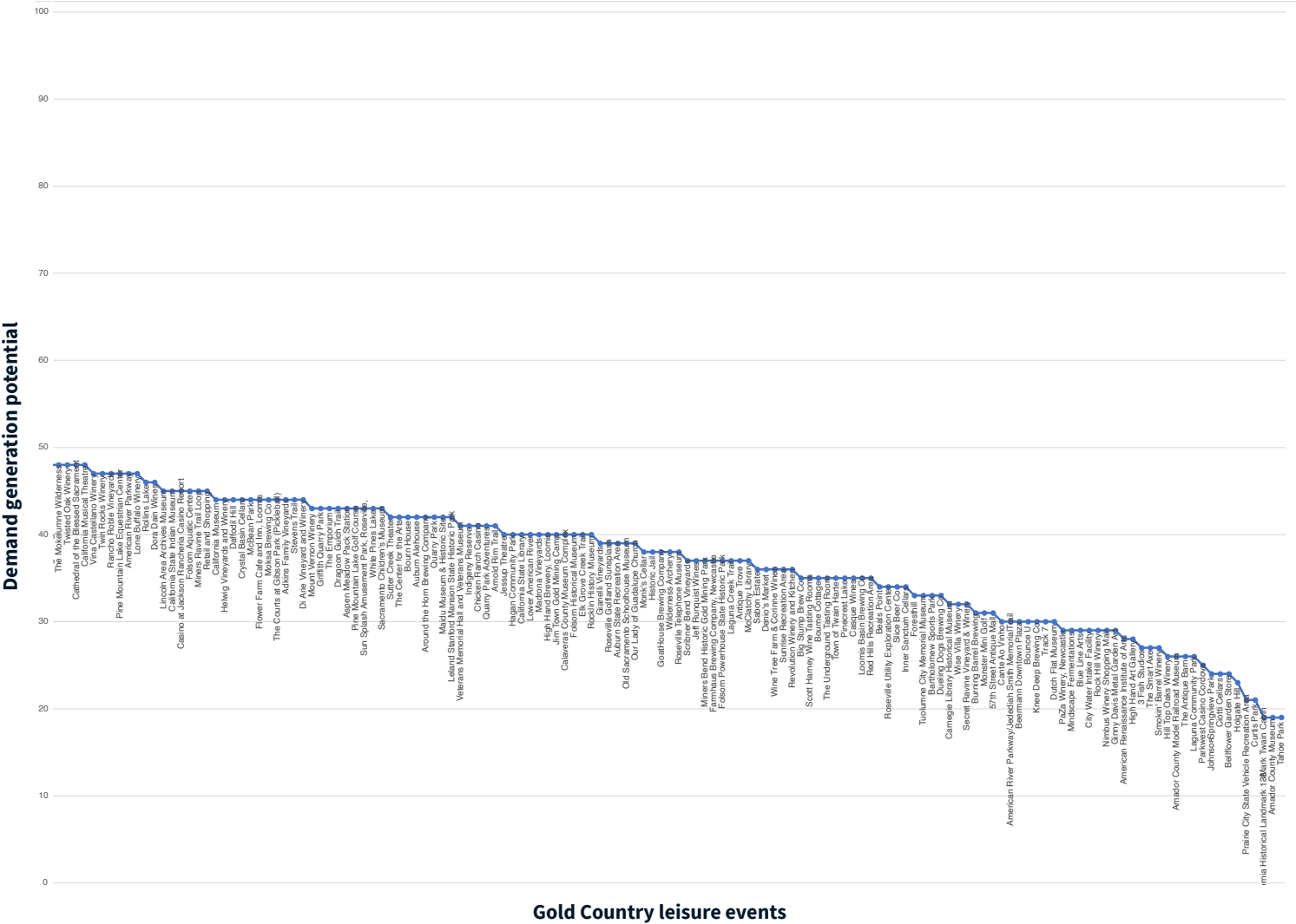
The Kitchen, Sacramento



Gold Country demand drivers



Gold Country demand drivers





# Event matrix

Purpose — Use criteria that drives event return to understand the current landscape of successful events and position the region to support up and coming events.



Identify key events serviced by the region



Rate events on matrix using 11 criteria



Identify those events that can grow in specific areas through matrix outcomes



Work with organizers on tactics for implementation

## Program components

- Tourism promotion — destination impact
- Benefit to the destination brand
- Innovation — uniqueness
- Evidence of partnerships
- Organizational structure and management capability
- Economic impact (direct spending)
- Suitable target market(s)
- Comprehensive marketing plan/approach
- Overnight stays (room nights)
- Scale of project — future potential
- Time of year — need periods

## Multi-day event

Each event is scored as a single instance, regardless of duration. The evaluation, across the 10 criteria, considers the event’s overall impact and attendance. Instead of daily attendance, the Event Matrix uses criteria such as total overnight stays and the suitability of the event’s target markets. The approach to determining overnight stays involves a two-stage analysis. The first stage uses methods tailored to each event’s reporting sophistication, including reviewing event websites (for past statistics and future room block numbers), reported attendance on Destination Marketing Organization (DMO) websites, and public articles for high-profile events. In the second stage, DMO representatives and regional advisory committees qualitatively review these findings to provide feedback and revisions, validating the scoring process.

## Risk

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



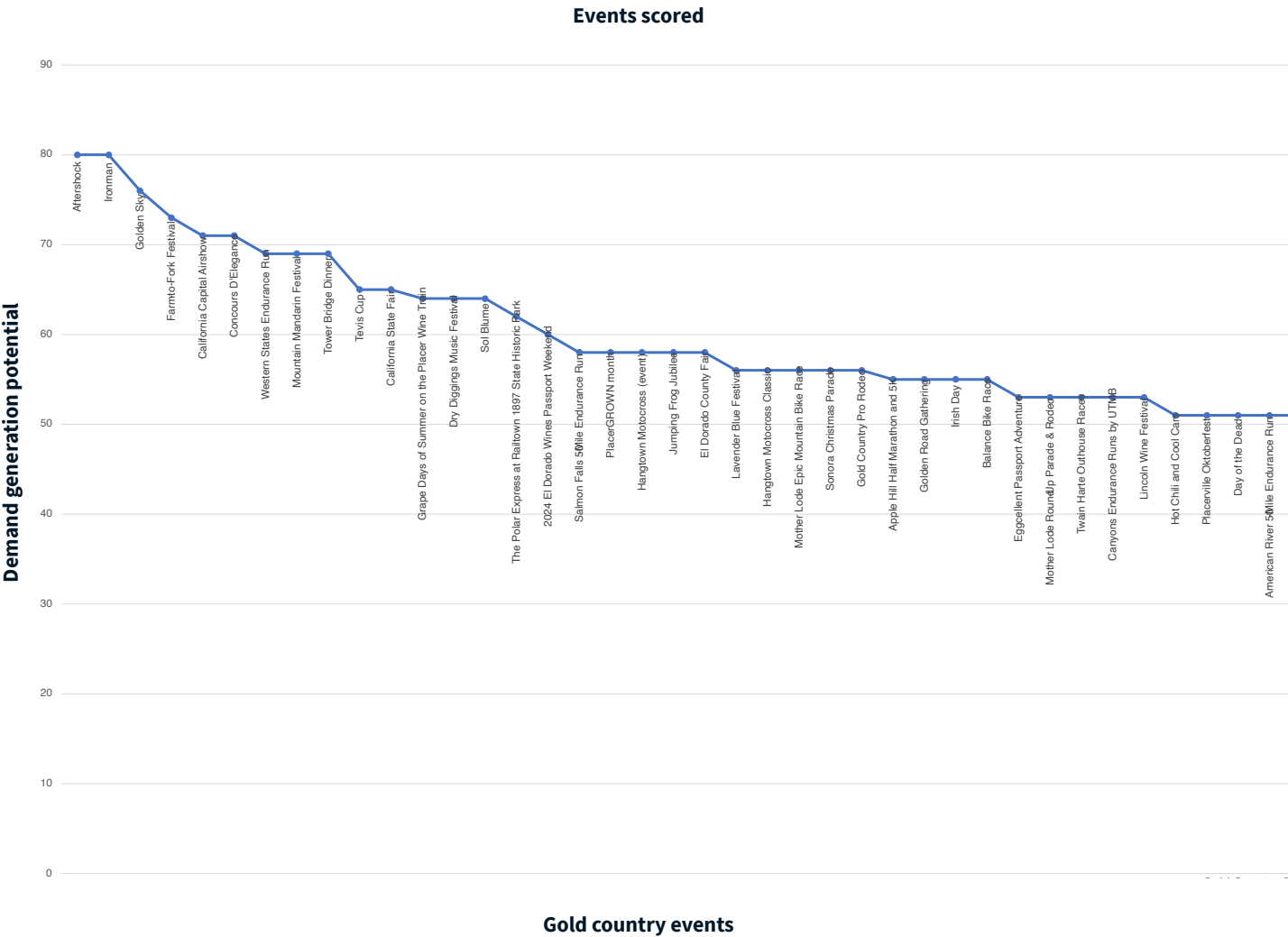
Yuba River, Grass Valley

**Program components**

	<b>Fail</b>	<b>Poor</b>	<b>Average</b>	<b>Above average</b>	<b>Excellent</b>	<b>Total points awarded</b>
Program components						10
1. Tourism promotion — destination impact						10
2. Benefit to the destination brand						10
3. Innovation — uniqueness						10
4. Evidence of partnerships						10
5. Organizational structure & management capability						10
6. Economic impact (direct spending)						10
7. Suitable target market(s)						10
8. Comprehensive marketing plan/ approach						10
9. Overnight stays (room nights)						10
10. Scale of project — future potential						10
+Bonus— need periods/time of the year						
Total maximum possible points = 55						<b>100</b>



Gold Country leisure events



Gold Country leisure events

