

Placer County Travel Industry Assessment and Detailed Economic Impact Estimates, 2002-2008p



March 2009

Prepared for

Placer County Office of Economic Development
Placer Valley Tourism
Placer County Visitors Bureau
North Lake Tahoe Resort Association

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Auburn, California

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Preface

This study, prepared for the Placer County Office of Economic Development by Dean Runyan Associates and Chuck Nozicka Consulting, is intended to assist local community and countywide decision makers in travel and tourism development, planning, and marketing efforts throughout Placer County.

In preparing this report we have received guidance and assistance from many individuals and organizations, which we thankfully acknowledge: Jan Decker, CEO of *Placer County Visitors Bureau*, Greg Van Dusen, CEO of *Placer Valley Tourism*, and Andy Chapman, Director of Tourism for the *North Lake Tahoe Resort Association*.

In addition, we want to express our thanks for the cooperation and support of a wide variety of stakeholders who participated in one-on-one, in-depth interviews, and contributed valuable information and insight toward this project. Participants included tourism business proprietors and non-profit entities, representatives from visitor industry associations, and public sector tourism or recreation related managers.

Finally, special thanks David Snyder, Director of the Placer County Office of Economic Development. Without his support and assistance, this report would not have been possible.

Executive Summary

Primary Recommendations

For Placer County overall, we have determined that the separate but cooperative efforts for each region provide the county with the best approach to tourism marketing and sustainable long-term economic development. Most notably, in the context of a difficult economy, travel and tourism generates significant economic benefits in the form of tax revenue, direct expenditures, earnings, and employment. Detailed estimates of the economic benefits for Placer County and each of the three regions, from 2002 to 2008, are provided in this report (see Section III: Economic Impacts of Travel).

The overarching recommendations for each Placer County region are as follows:

The Valley (Placer Valley). Placer Valley has significant support for its efforts from a range of public and private stakeholders. Development and marketing of “*The Valley*” as a team sports and lifestyle destination through the leadership of Placer Valley Tourism provides a unique positioning for the region that links extremely well with community development efforts and with travel and recreation development throughout the county.

Gold Country. The Sierra-Nevada foothills of the Gold Country offer a full array of outdoor recreation, heritage, and cultural tourism opportunities with significant growth potential. However, a large number of public and private sector promotional organizations dilute the destination message. Increased support for, and/or coordination with, the lead organization – Placer County Visitors Bureau – can provide a more unified image to the travel marketplace. Accordingly, we recommend that the county, local chambers, the City of Auburn, and associated stakeholders cooperate to increase funding for the lead organization and to better coordinate development activities and marketing information.

High Country (North Lake Tahoe). As a nationally and internationally known destination, travel to North Lake Tahoe significantly affects travel and expenditures throughout the entire county. Fortunately, this destination area is led by an established, nationally recognized, and effective organization. As both a voice to the marketplace and for the travel industry it serves, the North Lake Tahoe Resort Association (NLTRA) is a model tourism development program for Placer County. The organization provides sophisticated planning, reporting, and marketing services rarely replicated elsewhere in the Western United States. We cannot stress enough, the importance for county and industry stakeholders to continue their investment in, and level of support for, North Lake Tahoe and the lead organization.

I. Introduction

Placer county's wide-ranging, diverse natural landscape and water bodies, combined with a well-established infrastructure and transportation system, offers Californians and visitors from throughout the world the opportunity to visit some of the most appealing and unique destinations. Each of the three regions in Placer County – The Valley, Gold Country, and High Country – contain a rich resource of diverse attractions, including numerous opportunities for year-round outdoor recreation; natural, scenic wonders; Gold Rush Era historic sites; family-owned wineries; competitive sports venues; and unique cultural festivals. In addition, United Auburn Indian Community's Thunder Valley Casino, which offers a variety of gaming, entertainment, and fine dining, is scheduled to resume construction of a resort-style hotel in April 2009. With continued strategic product development, infrastructure maintenance, and enhanced regional partnerships, the long-range prospects for travel-generated economic impacts for Placer County are extremely positive.

This report provides an assessment of the tourism industry in Placer County and its three visitor regions (the Valley, Gold Country, and High Country), and makes recommendations for additional product development and marketing strategies. The study is intended to provide Placer County Office of Economic Development, as well as visitor-related organizations and businesses, with current information to document the economic significance of the travel industry, and help to guide their decisions regarding product development and growth.

Specific objectives include the following:

- Provide an overview of market conditions and pertinent trends for the area.
- Describe travel-generated economic impacts for Placer County and each of its three regions.
- Describe the primary attractions and market segments in terms of promotion and product development potential.
- Assess potential opportunities and strengths for travel and tourism industry growth.
- Prepare recommendations for marketing, including opportunities for cooperative promotions and other visitor industry development.

II. Market Factors and Trends

This section reviews market conditions, as well as travel industry trends pertaining directly to Placer County. Although many of these factors operate regionally and nationally, at least to some degree, they affect travel and tourism markets for Placer County. Understanding these trends can help identify the highest priority target markets and messages, and the best opportunities for new or enhanced travel and recreation products.

Placer County has experienced substantial success in the businesses associated with travel, tourism and recreation, particularly including wineries, gaming, lodging, food service and recreation. The continued success and growth of these industries will depend to a large degree on market conditions and on the further development of facilities, attractions, and special events in Placer County, and the marketing investments to support them. This section reviews population, travel and other trends that will affect demand. Subsequent sections discuss the economic benefits of the travel industry and projections for its growth.

Factors Affecting Demand

Demand for travel and recreation in Placer County will be influenced by a number of factors, some of which are amenable to local actions and some of which are largely external. In addition, demand will be strongly influenced by facility design and program choices, as well as by operations and marketing. This section reviews some of these factors; additional discussion appears in the last section that includes a review of findings and recommendations.

Placer County's appeal will be influenced to a substantial degree by factors that affect other destination locations and attractions, in particular:

- Population size and growth trends, which particularly affect local and regional demand from both adults and school children
- Demographic characteristics; particularly adults aged 50 and older
- Disposable income; income growth typically relates to increased spending on leisure and educational activities
- Travel costs (gasoline in particular) and traffic congestion, which affect the ability of visitors to travel to the area, and are particularly important for those traveling from 100 or more miles away
- Competition from other leisure, recreation and educational activities

This study focuses primarily on the first two factors in the list above for purposes of preparing demand trends. These discussions begin with an overview of important

demographic and travel trends that influence all attractions, in particular, national and regional trends over which Placer County or any other individual destination has no effective influence. However, before beginning this overview, it will be useful to examine the primary market segments that Placer County will probably pursue, and that will be the focus of the market analysis discussion which follows.

Primary Placer County Markets

Geographic markets are particularly important in the travel and recreation industry because of the strong influence that proximity has on travel behavior. Placer County lies within a three-hour drive of one of the most significant markets on the West Coast, and is also influenced by other important regional, national, and international markets. Below are the most significant markets, geographically defined.

The market segments that Placer County will target will vary somewhat over time, depending on the level and focus of its development, its draw as a local and regional visitor destination, visibility and reputation, and choices regarding marketing programs and operational policy. Overall however, the following is a useful segmentation for purposes of discussing demand and the ways by which destination development can be oriented to potential users.

Segment	Primary Characteristics
----------------	--------------------------------

Geographic Markets

Sacramento Metro Region	With over 2 million residents, Sacramento's Metro Region represents the geographically closest major market for Placer County. With day trips possible for these residents, many are likely to visit for more than one activity; combining outdoor recreation with visiting an attraction or event, shopping, entertaining friends or relatives, and dining out; most likely to be repeat visitors.
San Francisco Bay Area	With a population of 7.3 million people, most of whom live within a two-three hour drive of Placer County, the Bay Area represents another important geographic market for Placer County attractions and businesses. The Bay Area also has one of the highest average incomes of any area on the West Coast, enhancing its significance with respect to interest in outdoor recreation, food and wine, history, and good quality travel services. The Bay Area also attracts over 40 million visitors per year, many of whom travel beyond the metropolitan area for day and overnight stays.

Segment	Primary Characteristics
Out-of-State	California attracts many visitors each year from other states in the U.S., in particular from the relatively nearby states of Oregon, Washington, Nevada, and Arizona. Other states with large populations are significant: Texas, Florida, Illinois, and New York. Most of these travelers will be destined to the Bay Area or elsewhere in California, and can be attracted to visit Placer County as part of their itinerary.
International	California is one of the most important international travel destinations in the U.S. The Bay Area and other locations in California are also popular destinations for international travelers, particularly those from Asia and Europe. International travelers represent a very important market for Placer County because they often seek high quality, unique experiences during their trip, and are very interested in historic and cultural attractions. The NLTRA and the California Travel and Tourism Commission have international representation and media presence in many key international markets.

Interest/Demographic Categories

Organized sports events	Visits as part of one-day field trips, sometimes for longer periods as part of educational programs; generally during spring and fall periods; not a strong source of revenue but a primary focus for education-oriented attractions
Families	Primarily middle-aged households; strong interests in education, hands-on experience; many will live within an hour or two of travel time, although travelers of this type will be important also
History, culture and sightseeing	History and culture consistently remains one of the most common interests among travelers, and historic downtowns and sites are often part of day or weekend trips by urban residents seeking a getaway. The combination of diverse historic attractions – Vikingsholm Castle, Squaw Valley (site of 1960 Winter Olympics), Commons Beach, American River and Gold Rush Era towns and sites – combined with well-organized arts and cultural events, gives Placer County a strong advantage with this group. The rural ambiance of Placer County is also an asset.
Conferences and events	Special events, conferences and conventions are often held in locations that offer appropriately-sized facilities along with diverse opportunities for leisure and recreation activities. Small-to moderate-sized personal and business meetings, such as reunions, weddings, incentive events and corporate retreats, are also most often held in appealing locations. In addition, proximity to major population centers and several international airports gives Placer County a significant advantage.

Outdoor recreation	Nationally, about three-quarters of all outdoor recreation occurs near the land/water borders of US coastlines, rivers, and major lakes. In particular, travel trends show strong demand for all types of recreation boating, as well as raft trips, especially in areas with strong destination appeal or near growing urban areas. In 2007, private campgrounds experienced a record year, with continued growth of first-time campers as well as international travelers. Expansion of accommodations at destination ski areas, supported by sustained activity by an aging population seeking “gathering places” and recreation activities for their children and grandchildren, bodes exceptionally well for sustaining growth in travel to Placer County. In addition, snowboarding participation by younger and more culturally diverse clientele continues to grow.
Food and wine	Overall, 17% of American leisure travelers have engaged in some type of culinary or wine-related activity while traveling within the past three years. These individuals are often of moderate or higher income, well educated, and are likely to be “empty-nesters” (either young or post-children) who tend to have more disposable income to spend on fine dining and good-quality wines. This is a particularly important group for further growth of Placer County’s wineries. According to the Wine Institute, California wineries are the second largest California tourist destination after Disneyland. By some estimates, more than 14.8 million visitors to the State of California traveled to wineries as a part of their trip.
Gaming enthusiasts	California ranks among the highest in the number of casino gambling trips taken by residents. Californians made more than 50 million casino trips – 16% of the national total. California also has a casino participation rate higher than the national average. San Francisco-Oakland-Santa Rosa and Sacramento-Stockton, as two of the largest feeder markets, have casino participation rates of 37% and 40%, respectively. <i>A casino participation rate is defined as the percentage of residents older than the age of 21 who visited a casino at least once in the past 12 months.</i> Asian-American households are an important segment of this group.

Placer County’s economic development, facility/program planning, and marketing efforts should keep all of these segments in mind, as well as other segments that may become significant as development and market place conditions change.

National and International Travel Trends

A number of trends in the U.S. will affect the demand for destination areas such as Placer County – particularly demand from travelers from other parts of North America and international locations. Overall, many of these trends are very favorable, although they influence the type of visitor products and services that will be considered most appealing.

Demographics

American population is aging	The primary population growth is currently in the 50-59 age range. This age group is more likely to be empty nesters; only around 20% still have children at home, compared to 75% for those 40-49 years of age. Yet relatively few are retired – only 20%, compared to almost 85% for those 65 years of age or more. The retired population will increase strongly after 2010 (those 65 years of age or greater will increase by 36% by 2020).
More dual-earner households	About 59% of married women are in the workforce (compared to 58% in 1990, 50% in 1980 and 40% in 1970), while 75% of married men are in the workforce. With more than one worker, it is more difficult to schedule travel, which often means shorter trips, more frequently. Studies conducted by The Travel Industry Association (TIA) report shorter and leisure-oriented trips taken by married travelers 45 and older now dominate the travel market. Further, short trips (1-2 nights) are now reported to be far more popular than longer trips. Shorter trips tend to be more single-purposed – focused on one or two activities; the most popular consist of shopping, outdoor activities, historical places/museums, beaches or national/state parks.
Increasing incomes for some Americans	Incomes of professional, educated households have been increasing, producing a segment of the population with adequate resources for travel and recreation. Workers with a Bachelor's or Master's degree had faster income growth, compared to those with a high school diploma. Growth in the higher income markets can be expected to continue. In addition, there is a segment that can and will continue to travel, but will do so on a limited basis and be very value-oriented.
Educated population	The American population is becoming increasingly educated; over a quarter (27%) of American adults have four or more years of college, compared to 24% in 2000, 20% in 1990, 17% in 1980 and 11% in 1970. Educated travelers tend to be interested in information-rich activities.

Travel Trends

Shorter vacations, more frequently	North American households are more likely to take long weekend and other relatively short trips; the incidence of extended, multi-destination long-distance travel has been on the decline. More than half of all travel trips in the U.S. are now for two days or less, with only two in ten trips lasting a week or more. Thus, a majority of travelers are taking vacations closer to home. Half of Americans in a recent TIA survey of travelers said they were planning to travel closer to home.
Meetings travel slows	Travel for meetings, conferences and conventions was on a long-term growth trend throughout the 1990s, associated with the growing US economic activity of the period. This segment declined substantially after 2001, but is now growing again.
Organized group travel	Organized group travel – by motorcoach, cruise ship or air transportation – had been increasing through the 1990s, however, this growth essentially stopped in 2001 and 2002. However, long term increases in this segment should continue, as it is highly correlated to the aging of the North American population and increasing incomes. Much of this travel is during summer and is very value-oriented.
Seasonality	The preferred leisure travel season is June, July and August when well over a third of leisure travel occurs. Family travel in particular is oriented to these three summer months. Spring and Fall travel tend to be somewhat more popular among empty nesters, and is popular in the Southwest due to cooler weather during these periods. Gaming-oriented travel occurs year-around; meetings/convention travel is more oriented to fall and spring.
Travelers want education, packaged experience	The growth in travel and vacation trips that include children has increased the demand for educational experiences. Many analysts have noted a back to basics sentiment in the leisure travel market since 2001. This means vacations and travel activities that involve family, nature and America itself. Trips to visit friends and relatives, visiting national and state parks, and increased interest in America's heritage and culture through historic sites will be the preference.
Business and leisure travel are combined more	Travelers are more often extending business trips to include leisure activities. These travelers provide a good market for destinations in or adjacent to major metro areas. Business trips are also more likely to include spouses and children than in the past; however, the majority of business trips (74%) are taken by solo travelers.

Entertainment increasingly important	Entertainment is an increasingly important component of travel and recreation, and of education as well; travelers and facility users expect very good presentation, interactivity, visual appeal; competition and gaming are very popular.
Travel parties and grandparents	Travel parties including grandparents are increasing. These trips may have an educational focus and would not tend to include strenuous activity.
Membership programs increasing	Travel associated with membership programs is increasing: RV clubs, senior citizen organizations, membership reward programs (e.g., frequent fliers). Family reunions are a popular reason for travel.
International travel in the U.S.	Travel from international destinations, like most other segments of travel, had been increasing through the 1990s. Following a decline after 2001, growth has accelerated since, expanding to nearly 50 million arrivals. The most important markets are Canada and Mexico, which send more travelers to the U.S. than any other foreign nations. The UK is the top overseas country for inbound travel, followed closely by Japan. Germany, France, South Korea, Australia, Italy and Brazil round out the top ten. These travelers are particularly interested in things that are historic, unique and memorable. International travel is strongly affected by exchange rates.

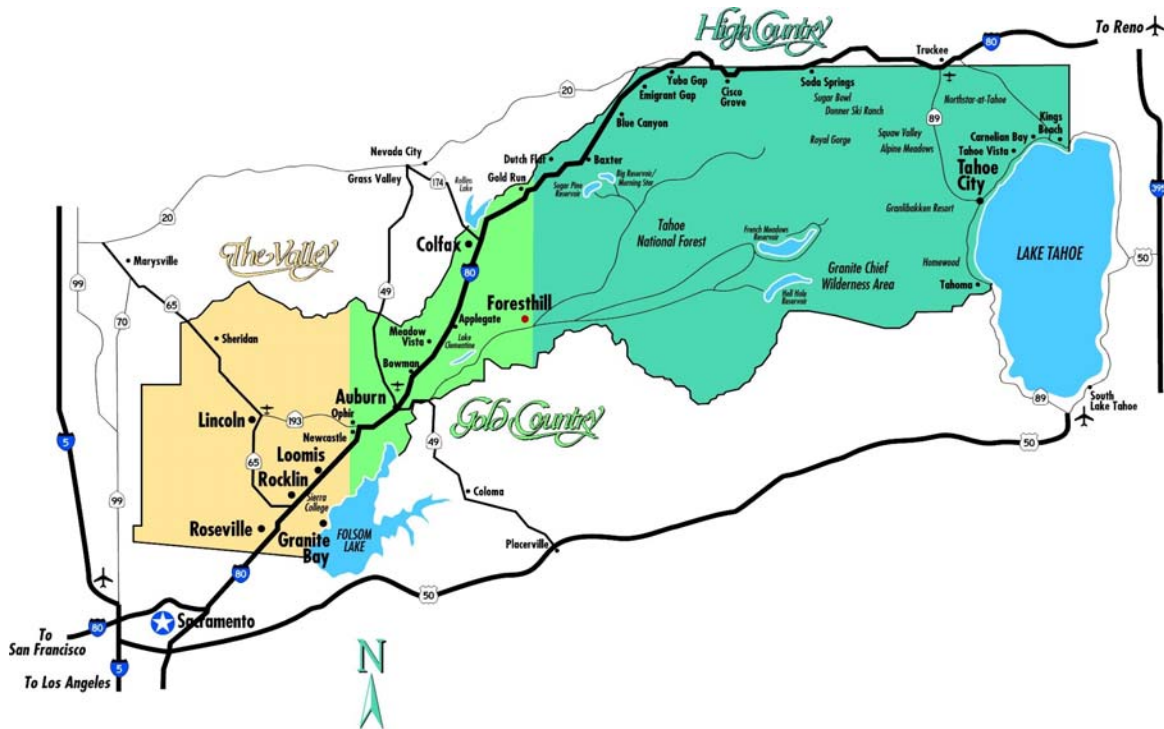
Placer County

Placer County is located in Northern California, 80 miles northeast of San Francisco and 20 miles west of Reno, bordering Nevada and El Dorado counties and the State of Nevada. Two major highways – Interstate 80 and State Highway 49 – intersect at the City of Auburn (county seat), and are connected by a well-developed network of rural roads, providing automobile access to wild and scenic rivers, recreation trails, and scenic vistas.

Figure II-1 shows a map of the entire County and its three regions:

- The Valley (Placer Valley)
- Gold Country
- High Country (North Lake Tahoe)

Figure II-1
Placer County and Regions



Population Growth Trends

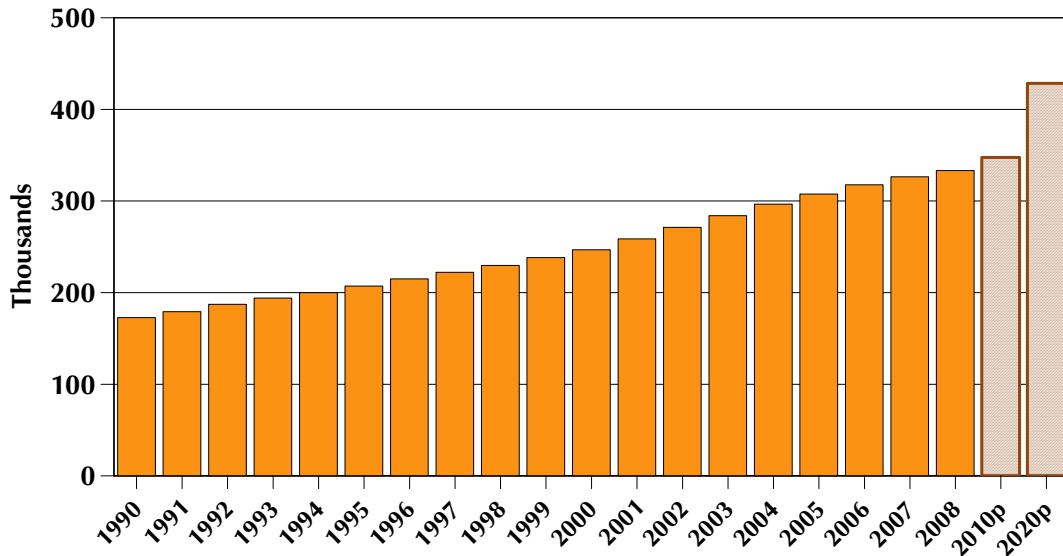
Currently, home to approximately 333,000 residents, Placer County's total population has grown substantially over the last two decades. Most notably, the bulk of the population increase has been (and will most likely continue) to be concentrated in the more urban areas – currently, the cities of Roseville (pop. 109,000), Rocklin (pop. 54,000), and Lincoln (pop. 40,000) are home to well over half of the County's residents (see Table II-1). Along with continued business development combined with attractive recreational opportunities, the population living in Placer County is projected to reach 425,000 residents by 2020 (see Figure II-2).

Table II-1
Population of Placer County by Area, 1990-2008

Area	1990	2001	2002	2003	2004	2005	2006	2007	2008	Avg. Annual % Change
Auburn	10,653	12,556	12,597	12,611	12,826	12,934	13,026	13,194	13,273	1.2%
Colfax	1,306	1,575	1,713	1,790	1,806	1,834	1,832	1,849	1,855	2.0%
Lincoln	7,248	13,621	16,839	19,977	23,410	27,323	33,716	37,642	39,758	9.9%
Loomis	5,705	6,307	6,309	6,355	6,323	6,317	6,506	6,570	6,624	0.8%
Rocklin	18,806	39,550	43,160	46,085	49,667	50,829	51,110	52,270	53,843	6.0%
Roseville	44,685	83,195	87,695	93,540	98,399	102,867	105,049	106,925	109,154	5.1%
Unincorporated	84,393	101,958	102,995	103,699	104,126	105,381	106,463	108,053	108,894	1.4%
Total	172,796	258,762	271,308	284,057	296,557	307,485	317,702	326,503	333,401	3.7%

Source: California Department of Finance

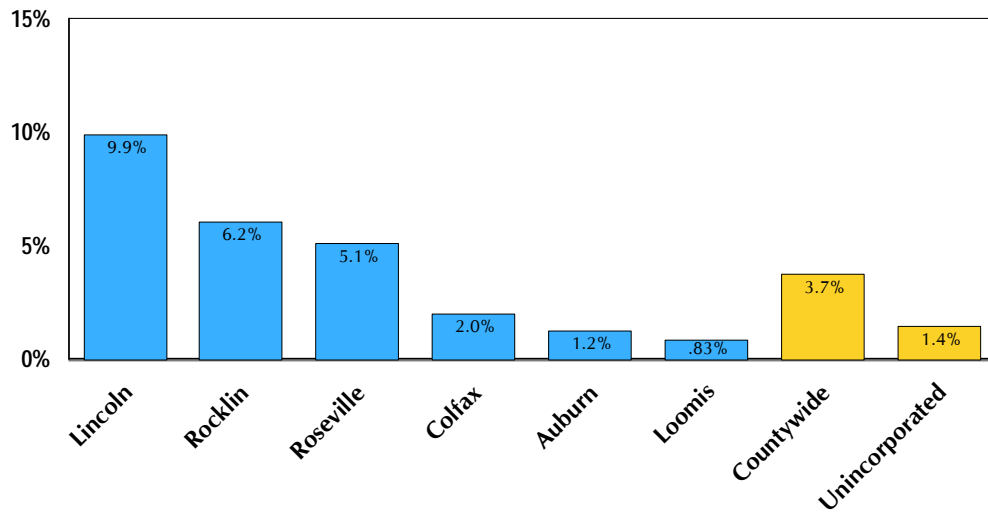
Figure II-2
Placer County Population Growth
1990-2020 (projected)



Source: California Department of Finance

According to the California Department of Finance, the city of Lincoln’s population showed the greatest growth, with an average increase of nearly 10 percent annually over the 1990-2008 period. Rocklin and Roseville also experienced substantial population growth with average annual percentage changes of 6.2 and 5.1 percent, respectively (See Figure II-3). In combination, the incorporated cities of Lincoln, Rocklin, and Roseville have increased almost threefold since 1990, an increase of approximately 132,000 new residents.

Figure II-3
Population Growth Rates
 (Annual Percentage Change, 1990-2008)



Note: Average Annual Percentage Change
 Source: California Department of Finance

Housing Units

As shown in Table II-2, from 2001 to 2008, the number of housing units in Placer County has grown by 35% to nearly 143,000 housing units, which are mostly single-family homes. While the number of housing units has increased substantially throughout most areas of the county, as with the population, the overall increase and rate of growth have been most notable in the incorporated cities of Lincoln, Rocklin, and Roseville.

In the unincorporated areas of the county, the number of housing units has increased less rapidly – by 12% over the same time period. About one-half of the housing units in unincorporated areas are located in the High Country/North Lake Tahoe Region.

Table II-2
Growth of Placer County Housing Units by Type, 2001-2008

Area	2001	2002	2003	2004	2005	2006	2007	2008	% Change 2001-2008
<i>Placer County – All</i>									
Single-family	88,534	93,149	98,393	103,295	108,174	113,098	116,647	119,631	35.1%
Multiple	17,501	18,726	19,856	21,299	21,934	22,494	22,820	23,032	31.6%
Total	106,035	111,875	118,249	124,594	130,108	135,592	139,467	142,663	34.5%
<i>Auburn</i>									
Single-family	3,889	3,932	3,992	4,052	4,134	4,218	4,291	4,324	11.2%
Multiple	1,600	1,600	1,600	1,680	1,680	1,680	1,680	1,680	5.0%
Total	5,489	5,532	5,592	5,732	5,814	5,898	5,971	6,004	9.4%
<i>Colfax</i>									
Single-family	461	497	511	524	533	538	543	547	18.7%
Multiple	175	201	227	227	235	235	235	235	34.3%
Total	636	698	738	751	768	773	778	782	23.0%
<i>Lincoln</i>									
Single-family	4,202	5,783	7,204	8,979	10,895	13,711	15,439	16,203	285.6%
Multiple	887	887	889	889	889	1,000	1,097	1,215	37.0%
Total	5,089	6,670	8,093	9,868	11,784	14,711	16,536	17,418	242.3%
<i>Loomis</i>									
Single-family	2,108	2,119	2,158	2,162	2,179	2,267	2,278	2,286	8.4%
Multiple	67	67	67	67	60	60	60	60	-10.4%
Total	2,175	2,186	2,225	2,229	2,239	2,327	2,338	2,346	7.9%
<i>Rocklin</i>									
Single-family	11,342	12,431	13,480	14,140	14,644	14,837	15,186	15,855	39.8%
Multiple	3,215	3,570	3,781	4,596	4,596	4,648	4,741	4,741	47.5%
Total	14,557	16,001	17,261	18,736	19,240	19,485	19,927	20,596	41.5%
<i>Roseville</i>									
Single-family	25,684	26,855	28,853	30,611	32,092	32,919	33,560	34,509	34.4%
Multiple	6,912	7,715	8,448	8,982	9,584	9,971	10,084	10,178	47.3%
Total	32,596	34,570	37,301	39,593	41,676	42,890	43,644	44,687	37.1%
<i>Unincorporated</i>									
Single-family	40,848	41,532	42,195	42,827	43,697	44,608	45,350	45,907	12.4%
Multiple	4,645	4,686	4,844	4,858	4,890	4,900	4,923	4,923	6.0%
Total	45,493	46,218	47,039	47,685	48,587	49,508	50,273	50,830	11.7%

Source: California Department of Finance

Note: Data represents January 1 estimates for year specified. Mobile home data not included.

Within the High Country Region, a large percentage of the housing units serve as private vacation homes and/or vacation rental properties, most notably for the communities of North Lake Tahoe. As shown in Table II-3 below, nearly two-thirds (63%) of all single-family homes, condominiums, and time-shares are not owner-occupied.

Table II-3
Single-Family Residential, Condominium, and Time-Share Housing Units, 2008

Location	Zip Area	Owner-Occupied	Absentee Owner	Total Units	Percent Absentee
Carnelian Bay	96140	4,381	3,529	7,910	45%
Homewood	96141	128	900	1,028	88%
Tahoma	96142	41	166	207	80%
Kings Beach	96143	419	1,682	2,101	80%
Tahoe City	96145	4,105	7,443	11,548	64%
Olympic Valley	96146	243	1,879	2,122	89%
Tahoe Vista	96148	161	501	662	76%
Combined Total		9,478	16,100	25,578	63%

Source: DataQuick

Commercial Lodging Properties

Within Placer County, there are a wide variety of lodging accommodation rooms distributed among hotels, motels, bed & breakfasts, rented condominium “villages”, and single-family vacation homes throughout Placer County. Currently, The Resort at Squaw Creek, with over 400 rooms, has the largest share available in one property. In addition, Thunder Valley Casino has begun, and will resume in April 2009, construction of a 400-room resort near Lincoln. Table II-4 lists the largest accommodations (50 units and above) in the County. In addition to those lodging accommodations, property management companies operate vacation rental activity for many single-family vacation homes throughout North Lake Tahoe.

Campgrounds and RV Parks

There are over 3,000 campground and RV sites located in Placer County. In addition to the sites available at private campgrounds and RV parks, the U.S. Forest Service and California State Department of Parks and Recreation manage over one-third of the sites, with convenient access to numerous outdoor recreation activities such as fishing, boating, and hiking. High Country, with a large proportion of publically managed land, has the highest number of tent and RV campsites. In comparison, Placer Valley and Gold Country’s campsites are much more oriented to commercial RV campgrounds.

Table II-4
Larger Accommodations (50 rooms and above) in Placer County

Location/Accommodation	Rooms
<i>Gold Country –</i>	
Holiday Inn, Auburn	96
Travelodge Auburn	80
Comfort Inn Central, Auburn	79
Best Western Golden Key, Auburn	68
Foothills Motel, Auburn	62
Motel 6, Auburn	57
Super 8 Motel, Auburn	52
<i>High Country –</i>	
Resort at Squaw Creek, Olympic Valley	403
Northstar-at-Tahoe, Northstar ¹	225
The Village at Squaw Valley, Olympic Valley	200
The Ritz-Carlton Highlands, Lake Tahoe ²	170
Granlibakken Resort, Tahoe City	165
Squaw Valley Lodge, Olympic Valley	115
Tahoe Inn, Brockway	100
Olympic Village Inn, Olympic Valley	90
Franciscan Lakeside Lodge, Tahoe Vista	64
Tahoe Sands Resort, Tahoe Vista	61
Plumpjack Squaw Valley Inn	61
Pepper Tree Inn, Tahoe City	51
<i>The Valley –</i>	
Orchid Suites, Roseville	179
Hilton Garden Inn, Roseville	131
Best Western Roseville Inn	125
Courtyard Marriott Galleria, Roseville	125
Howard Johnson, Rocklin	124
Extended Stay America, Roseville	122
SpringHill Suites, Roseville ³	118
TownPlace Suites, Roseville ⁴	115
Homewood Suites, Roseville	111
Heritage Inn Express, Rocklin	100
Staybridge Suites, Rocklin ⁵	98
Heritage Inn Express, Roseville	97
Courtyard Marriott Roseville	90
Larkspur Landing, Roseville	90
Residence Inn, Roseville	90
Holiday Inn Express, Lincoln	87
Hampton Inn and Suites, Roseville	85
Holiday Inn Express Galleria, Roseville	83
Fairfield Inn by Marriott, Roseville	82
Comfort Suites, Rocklin	72
Rocklin Park & Spa Hotel	67
Days Inn, Rocklin	65

¹ Northstar-at-Tahoe includes individually owned lodging units (lodge rooms, condos, and homes).

² The Ritz-Carlton Highlands, Lake Tahoe is situated mid-mountain in the Northstar-at-Tahoe ski resort and is schedule to open in fall 2009.

³ Opened in October, 2008

⁴ Opened in February, 2009

⁵ Opened in December, 2008

Air Transportation

While declining slightly from the previous year, *Sacramento International Airport* served approximately 10 million passengers (an estimated 1.9 million were visitors), in calendar year 2008. Since Sacramento's airport serves a metro area of over 2 million people, a notable proportion of scheduled passenger air service is due to the area's residents, as identified by those who depart from and return to Sacramento (see Table II-5).

In calendar year 2008, *Reno-Tahoe International Airport* (RTIA) served 4.1 million passengers (an estimated 1.2 million were visitors), a decrease of about 16% since 2001. RTIA, with about 160 daily departures, offers the most direct scheduled passenger air service within close proximity to the High Country Region of Placer County (51 miles from RTIA to Tahoe City).

Table II-5

Airport Passengers and Visitors* for Selected Airports, 2001-2008

Airport	2001	2002	2003	2004	2005	2006	2007	2008	% Change 2001-08
	(Millions)								
<i>Sacramento International Airport</i>									
Passengers	8.0	8.5	8.8	9.6	10.2	10.4	10.8	10.0	24.2%
Visitors*	1.7	1.7	1.7	1.8	1.9	2.0	2.0	1.9	13.9%
<i>Reno/Tahoe International Airport</i>									
Passengers	4.9	4.5	4.6	5.1	5.2	5.0	5.0	4.1	-16.4%
Visitors*	1.5	1.3	1.3	1.4	1.4	1.5	1.4	1.2	-18.7%

Sources: Dean Runyan Associates and U.S. Department of Transportation

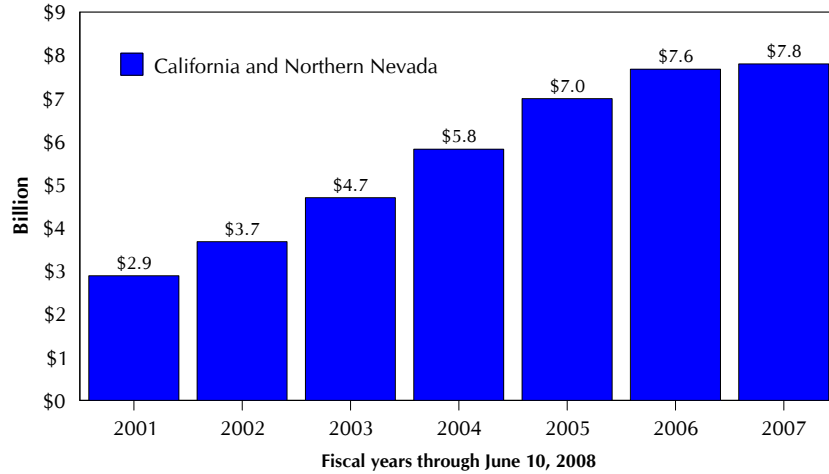
* Visitors as estimated by Dean Runyan Associates, based on U.S. Department of Transportation: Origin and Destination Survey. Visitor air travel does not include round-trip passengers that originated in Sacramento or Reno, nor does it include passengers that are continuing travel on a connecting flight.

Tribal Gaming Overview

As shown in Figure II-4, recent and significant growth in tribal gaming revenue has occurred in California and Northern Nevada since 2001. Placer County's gaming industry began when The United Auburn Indian Community opened the *Thunder Valley Casino* in June 2003, attracting thousands of visitors, most notably, from the Sacramento Metro Region and San Francisco Bay Area. Today the casino has 2,600 slot machines and 100 gaming tables, as well as 9 restaurants, including a 500-seat buffet with food from around the world. Future development plans include a 400-room hotel and multipurpose entertainment center in unincorporated Placer County near Lincoln, and, built as such, will become the largest resort facility in the county.

Significant casino resort development has also taken place in neighboring counties of El Dorado, Amador, and Yolo with the completion of three additional tribal casino resorts: Jackson Rancheria, Cache Creek Casino Resort, and Red Hawk Casino (see locations in Figure II-5 and facility details in Table II-6).

Figure II-4
California Tribal Gaming Revenue Growth, 2001-2007



Note: Includes California tribal casinos and Pyramid Lake Paiute Indian Tribe in Nevada.
 Source: National Indian Gaming Commission

Figure II-5
Area's Tribal Casinos

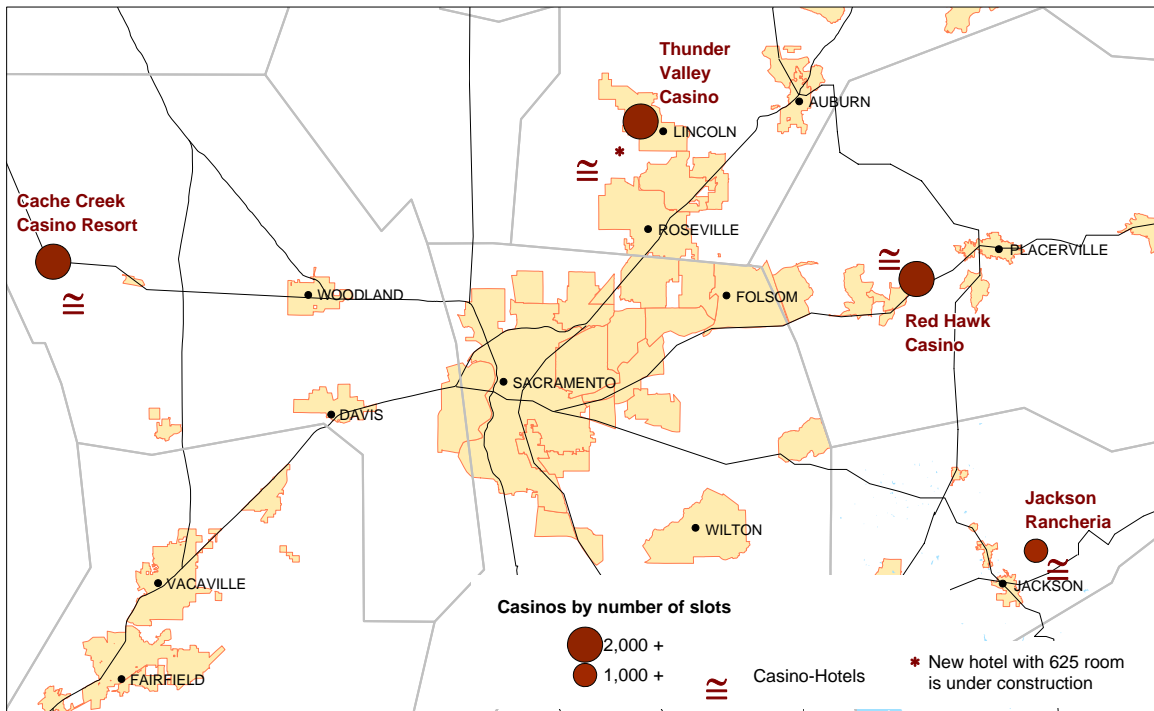


Table II-6
Area's Tribal Casinos: Location and Facilities

Casino	County	Casino Floor (Sq. Ft)	Gaming Machines	Restaurants ¹	Hotel Rooms
Cache Creek Casino Resort	Yolo	75,000	3,130	8	200
Jackson Rancheria	Amador	130,000	1,525	7	146 ²
Red Hawk Casino	El Dorado	88,000	2,122	6	250 ³
Thunder Valley Casino **	Placer	85,000	2,600	5	400 ⁴

¹Excluding lobby bars and lounges. ²Currently, 60 units under construction. ³Planned for future phase.

⁴In April 2009, construction will resume on a planned 400-room resort hotel, parking garage, and a multi-purpose entertainment center.

** Thunder Valley Casino contributes several million dollars to Placer County agencies through the Memorandum of Understanding between the United Auburn Indian Community and the County, and through the Tribe's Community Giving Program. Thunder Valley Casino pays the Placer County Sheriff's Department and the Placer County Fire Department over \$1 million each annually, as well as \$2.5 million in property tax to Placer County. Placer County is also the beneficiary of over \$500,000 in sales tax that the casino spends every year. The United Auburn Indian Community's Giving Program has given over \$6.5 million to-date to South Placer County nonprofits to support organizations that positively impact the physical, emotional and educational well-being of Placer County residents who are disadvantaged.

Source: Dean Runyan Associates

There are also three casino hotels located on the north shore of Lake Tahoe just across the Nevada state line, in the communities of Crystal Bay and Incline Village (in Washoe County, Nevada). These established lodging and gaming facilities are easily accessible to many of Placer County's visitors, most notably those staying in the North Lake Tahoe Region.

Wineries & Vineyards

Wine grapes were first introduced in Placer County in 1848 and became a thriving industry in the 1860s when miners began converting to winemakers. When alcohol became illegal during Prohibition, most vineyards were converted to apple, pear and citrus orchards. Some new vineyards were planted in Placer County in the 1970s, but most of the vineyards existing today were started in the late 1990s, and became wineries in the early 2000's.

Currently, Placer County now has about ten active, family-owned and operated wineries, each with unique vineyards (see Figure II-6). Placer County wineries are notable in that a very high proportion of wine production is sold on site, or otherwise in restaurants and through retail establishments throughout the County. Nearly all offer wine tasting and winery/vineyard tours by appointment, though on-site visitor facilities are limited. Clearly, visitors to Placer County are a primary source of wine sales and are most significant for the economic viability of these small, family-owned businesses.

Figure II-6
Placer County Wineries & Vineyards: Location Map

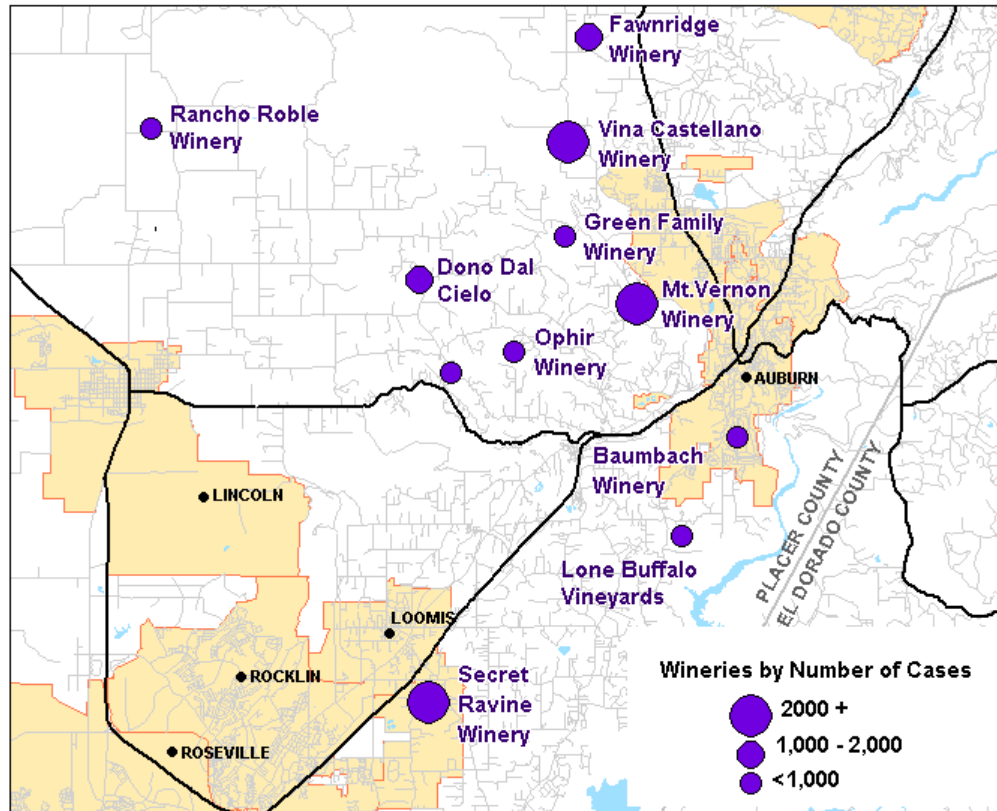


Table II-7
Placer County Wineries & Vineyards

Name	Wine Production (cases)	Year Opened*	Wine Tasting Room
Baumbach Wine	500	1999	✓
Dono dal Cielo Winery	1,400	2007	✓
Le Casque	500	2007	
Fawnridge Winery	1,500	2004	✓
Green Family Winery	700	2000	
Lone Buffalo	500	2007	coming soon
Mt. Vernon Winery	4,400	1999	✓
Ophir Wines	900	2001	
Pescatore	700	2003	✓
Rancho Roble Vineyards	600	2003	✓
Secret Ravine Winery	2,000	2002	✓
Vina Castellano Winery	2,000	2002	✓

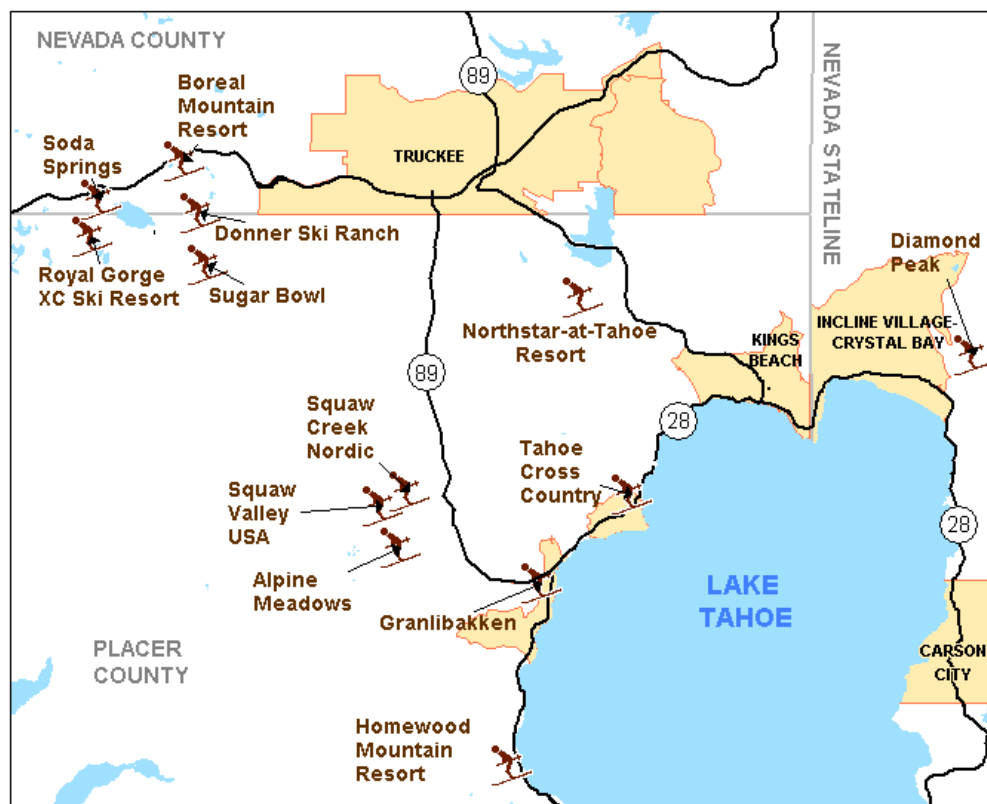
*Year the winery was opened; in most cases, vineyards were previously established.

Source: Placer County Wineries, wineries' websites and telephone interviews.

Significant tourism development potential for Placer County wineries

Recently, the Placer County Planning Department adopted a wine ordinance regarding allowable activities for winery operations such as public visits, tasting, sales, and “tours.” While the ordinance includes limits for the purpose of maintaining a peaceful atmosphere for locals, the main goal is to encourage travel to Placer County’s increasingly successful family-owned wineries. Allowances made under the ordinance include: sales of wine/beer/brandy bars, along with food and merchandise on private roads, and wineries can hold six promotional events per year. These allowances, along with marketing events through the Placer Hills Winery Tour and the Placer Wine & Grape Association, will attract more attention from neighboring businesses and restaurants, as well as enhance Placer County as a well-known travel destination with a unique variety of small wineries.

Figure II-7
Placer County Area’s Ski Resorts



Outdoor Recreation

Placer County offers visitors an abundant and diverse range of outdoor recreation opportunities year round. For those seeking awesome skiing and snowboarding, North Lake Tahoe offers the largest concentration of ski resorts in the U.S. (see Figure II-7). Other winter recreation opportunities include snowmobiling, snowshoeing, ice-skating,

snow tubing, and sleigh riding. Opportunities for other adventurous activities abound, such as water-skiing, river rafting, mountain biking, horseback riding, gold panning and bungee jumping. Breathtaking scenery and diverse natural areas – including Lake Tahoe, Tahoe National Forest, Folsom Lake State Recreation Area, and the American River drainage – offer abundant opportunities for those seeking outdoor recreation, adventure, and escape.

III. Economic Impacts of Travel

This section of the report documents the economic impacts of the travel industry for Placer County from calendar year 2002 through 2008. The estimates for 2008 are considered preliminary (p). The Placer County estimates for 2000 through 2008p are based on the same methodology (the Regional Travel Impact Model or RTIM), and are therefore comparable to the county and statewide estimates prepared annually for the California Travel and Tourism Commission.

In interpreting the findings, it should be noted that:

- The monetary estimates in this report are expressed in current dollars. There is no adjustment for inflation.
- The employment estimates in this report are estimates of the total number of full and part-time jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll and self-employment are included in these estimates.
- The impacts associated with both overnight and day travel are included if the travelers either remain at the destination overnight or the destination was more than 50 miles *one-way* from the traveler's home.
- In the case of Thunder Valley Casino, *only* the impacts associated with visitors who spent at least one accommodation night in Placer County are included¹.
- The terms "traveler" and "visitor" are used interchangeably in this report. Both represent a person who is traveling in Placer County away from his or her home. The purpose of such travel can be for business, pleasure, shopping, or to attend special events or meetings.

In addition, many Placer County residents travel to numerous destinations outside the county for both business and pleasure; most notably, in 2007, the residents of households located in Lincoln, Rocklin, and Roseville spent over \$450 million on outbound travel to locations outside the County. A detailed estimate of the travel spending made by these residents for travel outside the county is shown in Appendix A.

¹ Any information with regard to magnitude and origin of visitors to Thunder Valley Casino would be considered proprietary and not available for use in this analysis.

Travel Impact Trends

The travel industry drives a primary and rapidly growing segment of the economy in Placer County, providing business opportunities, employment, and tax revenue for many local communities. Travel spending in Placer County for 2008p was \$787 million, with earnings of \$232 million and employment of 9,460 people. Local and state tax receipts grew to \$43.9 million. The overall trend shows that from 2002 to 2008, travel spending grew by an average annual rate of 3.8% per year, while travel-generated employment remained relatively flat (see Table III-1 below). Additional detail is shown for each region in Table III-2 on the following page.

Table III-1

Placer County Direct Travel Impacts, 2002-2008p

	Spending (\$Million)	Earnings (\$Million)	Employment (Jobs)	Tax Receipts (\$Million)		
				Local	State	Total
2002	631.1	195.8	9,430	12.4	22.8	35.1
2003	652.0	202.8	9,540	12.6	23.5	36.0
2004	690.3	212.0	9,670	12.8	25.1	37.9
2005	716.6	214.4	9,300	13.0	26.2	39.1
2006	764.4	230.0	9,760	14.1	27.6	41.7
2007	771.6	231.6	9,660	13.9	27.7	41.6
2008p	787.2	231.7	9,460	15.8	28.1	43.9
<i>Annual Percentage Change</i>						
07-08p	2.0	0.1	-2.1	13.8	1.5	5.6
02-08p	3.8	2.9	0.1	4.2	3.6	3.8

Estimates for 2008 are preliminary. Annual change for 2000-2008p is the average annual percentage change. Earnings include wages and salaries, paid benefits and proprietor income. Employment includes payroll employees and self-employed. Property taxes are not included.

Source: Dean Runyan Associates, Inc.

Table III-2

Placer County Travel Impacts by Region, 2002-2008p

	2002	2003	2004	2005	2006	2007	2008p	**Annual Change
High Country*								
Accommodation Sales (\$M)	76.3	75.5	79.7	81.0	88.4	81.1	81.7	1.1%
Travel Spending (\$M)	356.7	323.8	340.7	348.2	376.5	355.4	361.4	0.2%
Earnings (\$M)	111.7	104.3	109.7	111.9	121.6	114.1	114.8	0.5%
Employment (jobs)	5,020	4,810	4,920	4,900	4,940	4,560	4,500	-1.8%
Local Taxes (\$M)	8.2	8.0	8.5	8.6	9.4	8.7	10.7	4.5%
State Taxes (\$M)	9.4	8.5	9.3	9.7	10.5	10.1	10.3	1.6%
Gold County								
Accommodation Sales (\$M)	22.7	22.7	25.7	28.3	30.7	33.0	32.1	6.0%
Travel Spending (\$M)	113.4	145.0	158.3	171.2	179.9	188.8	194.6	9.4%
Earnings (\$M)	32.5	41.1	44.3	46.4	49.2	52.1	52.5	8.3%
Employment (jobs)	1,730	2,010	2,080	2,050	2,210	2,290	2,250	4.5%
Local Taxes (\$M)	1.2	1.3	1.3	1.3	1.4	1.5	1.5	4.2%
State Taxes (\$M)	5.3	6.2	6.7	7.2	7.4	7.6	7.7	6.4%
The Valley								
Accommodation Sales (\$M)	35.7	38.0	40.4	40.9	45.0	51.4	49.2	5.5%
Travel Spending (\$M)	161.0	183.3	191.3	197.2	208.1	227.5	231.2	6.2%
Earnings (\$M)	51.5	57.4	57.9	56.0	59.2	65.4	64.4	3.8%
Employment (jobs)	2,680	2,720	2,660	2,350	2,610	2,810	2,700	0.1%
Local Taxes (\$M)	3.0	3.3	3.1	3.0	3.2	3.7	3.6	3.2%
State Taxes (\$M)	8.1	8.8	9.1	9.3	9.7	10.1	10.1	3.8%
Placer County Total*								
Accommodation Sales (\$M)	134.6	136.2	145.8	150.3	164.1	165.5	163.0	3.2%
Travel Spending (\$M)	631.1	652.0	690.3	716.6	764.4	771.6	787.2	3.8%
Earnings (\$M)	195.8	202.8	212.0	214.4	230.0	231.6	231.7	2.9%
Employment (jobs)	9,430	9,540	9,670	9,300	9,760	9,660	9,460	0.1%
Local Taxes (\$M)	12.4	12.6	12.8	13.0	14.1	13.9	15.8	4.2%
State Taxes (\$M)	22.8	23.5	25.1	26.2	27.6	27.7	28.1	3.6%

Note: Details may not add due to rounding. Estimates for 2008 are preliminary.

*High Country includes some impacts associated with longer term second home stays not included in county and statewide travel impact estimates prepared for California Travel and Tourism Commission.

** Annual Change is the average annual percentage change.

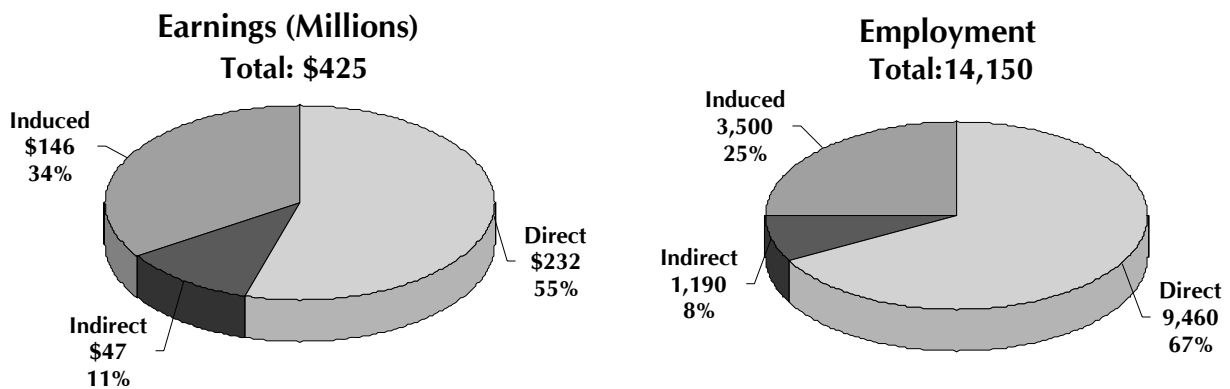
Source: Dean Runyan Associates, Inc.

Secondary Impacts

The most comprehensive way to describe the economic benefits of an industry is to consider not only its direct impacts, but to also include a measure of the secondary benefits that accrue due to the impact of visitor-related businesses. Travel spending in Placer County brings money into communities within the area in the form of business receipts. Portions of these receipts are spent within the county for labor and supplies. Hotels, for example, may purchase maintenance services from independent contractors. Business proprietors and employees, in turn, spend a portion of their earnings on goods and services in the county. This “re-spending” of direct travel-related revenues creates secondary benefits¹ also known as indirect and induced impacts. To summarize:

- **Direct** impacts represent the employment and earnings attributable to travel expenditures made directly by travelers at businesses throughout the county.
- **Indirect** impacts represent the employment and earnings associated with industries that supply goods and services to the direct businesses (i.e., those that receive money directly from travelers throughout the county).
- **Induced** impacts represent the employment and earnings that result from purchases for food, housing, transportation, recreation, and other goods and services made by travel industry employees, and the employees of the indirectly affected industries.

Total Employment and Earnings Generated by Travel in Placer County, 2008p



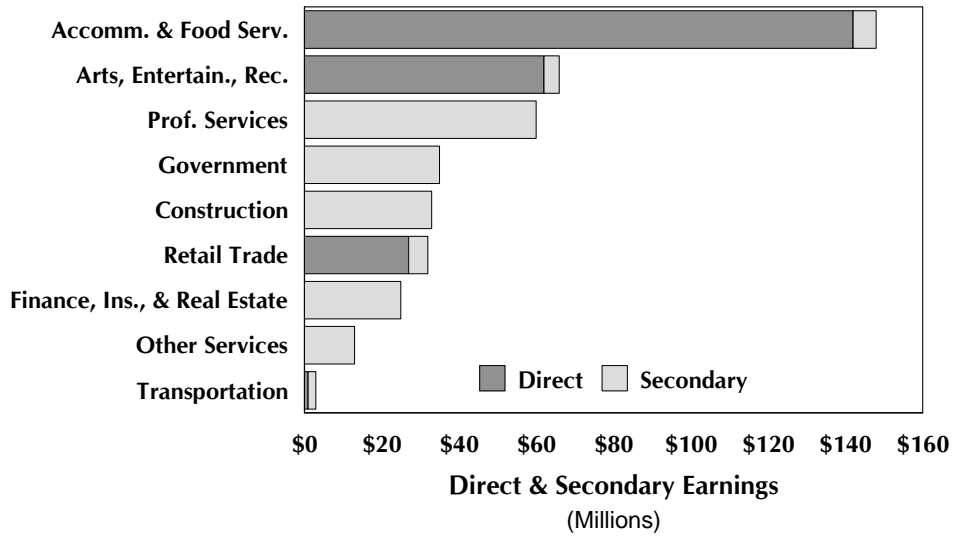
Note: Indirect and induced impacts estimated by Dean Runyan Associates with Minnesota IMPLAN model. Percentages may not add to 100% due to rounding.

¹ These secondary impacts are sometimes referred to as a “multiplier” effect. The multiplier is the ratio of the total impacts to the direct impacts. Secondary impacts or multipliers will vary substantially among different economic regions. In general, larger and more diverse economies will have larger secondary impacts or multipliers because there will be less “leakage” of indirect and induced effects.

Businesses that benefit from secondary impacts

Secondary impacts provide a picture of the magnitude and variety of business activity generated by travel spending in Placer County. Thus, the economic benefits of the travel industry spread throughout the local economy.

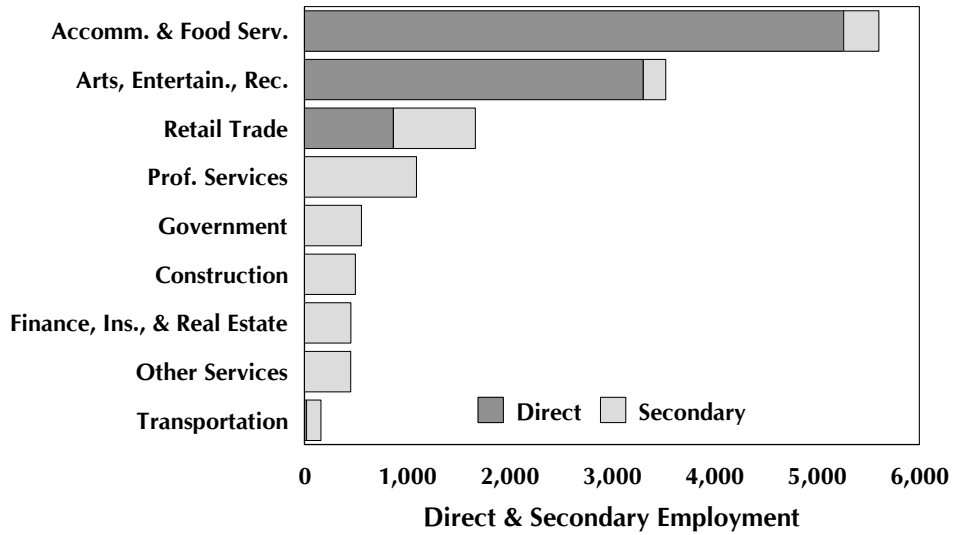
**Direct and Secondary Travel Generated Earnings
Placer County, 2008p**



Source: Dean Runyan Associates and Minnesota Implan Group.

Note: Secondary Impacts include Indirect and Induced effects. Accommodation & Food Service includes the impact associated with the rental of homes and condominiums.

**Direct and Secondary Travel Generated Employment
Placer County, 2008p**



Source: Dean Runyan Associates and Minnesota Implan Group.

Note: Secondary Impacts include Indirect and Induced effects. Accommodation & Food Service includes the impact associated with the rental of homes and condominiums.

IV. Tourism Assessment and Recommendations

This section of the report provides a detailed assessment for tourism product development and marketing strategies. Specifically, this tourism assessment and recommendations are based on information gathered, and augmented by on-site observations of the existing visitor product and supporting centers throughout the county. In addition, 25 in-depth interviews were conducted, representing stakeholders from each of Placer County's three regions (See Appendix C). For each region, this section presents the following:

- Products and experiences
- Opportunities and constraints
- Recommendations
- Linkages among the three regions (an overall perspective)

First, and foremost, the assessment identified the primary destination marketing organizations supporting each region, which are as follows:

- Placer Valley Tourism (PVT)
- The Placer County Visitors Bureau (PCVB)
- North Lake Tahoe Resort Association (NLTRA)

The Placer County tourism industry is fortunate to have these three lead entities, because organizational development is a primary foundation for any successful countywide or sub-county/regional development effort. Placer County tourism also relies on a de facto public-private partnership to maintain and develop a vibrant tourism economy – *each category of activities depends on support from both private and public sector providers.*

1. The public and not-for-profit sector funds and/or organizations provide overall regional marketing programs and lead cooperative tourism development initiatives, while public land managers provide recreation opportunities. In addition, community planning and development ensures that town sites provide authentic, user friendly, sustainable destinations.
2. Private sector businesses provide goods and services to those traveling either via hospitality services or retail establishments. In addition, businesses provide direct marketing about their products to their respective targeted markets, hospitality services that establish a lasting image in the minds of travelers, a venue for visitor information through kiosks and information facilities, and through the knowledge of their staff.

Assessment Findings

For each of the three regions, we assess the range of products and experiences, the opportunities and constraints to further development, and offer a series of associated recommendations. In short, this section answers the following questions:

1. How can Placer County capitalize on its tourism products and providers?
2. How can the county's stakeholders enhance the travel experience in order to provide a more appealing product to potential visitors?

Placer Valley

Placer Valley comprises the westernmost reaches of the county including lands on the verdant Sacramento Valley floor up to the low foothills of the Sierra Nevada range. The area is largely comprised of three suburban cities: Roseville, Lincoln, and Rocklin, which have undergone extensive population growth and development in recent years. Much of this growth included high quality facilities and businesses, and has been driven by demand – in other words, a population of affluent residents and associated business development. Identified stakeholders that participate in promoting and marketing the Placer Valley tourism industry includes, but are not limited to the following:

- Placer Valley Tourism
- Cities of Roseville, Lincoln, and Rocklin
- Lodging, retail, and restaurants
- Not-for-profit organizations
- Team sports organizations
- Chambers of Commerce

The Valley region has been marketing “lifestyle” tourism, principally team sports and recreation venues, supported by high quality shopping, dining, gaming, golf and lodging facilities. While the lead organization *Placer Valley Tourism* is actively marketing these amenities, the Placer Valley region is an emerging destination with many facilities that are either under development or planned for future development. It should be noted that *Placer Valley Tourism* also functions as the lead advocate for development of significant tourism facilities and convention space. Through this advocacy, *Placer Valley Tourism* links private and public sector stakeholders with a focused goal – to promote “*The Valley*” as a premier sports tourism and leisure recreation destination.

Products and Experiences

The following products and experiences represent the primary attributes that attract travelers to Placer Valley. As indicated in Table IV-1 the region possesses a targeted range of activities and venues. *Placer Valley Tourism* markets its current inventory of leisure products, while leading the industry forward with significant planning of facility development.

Outdoor Recreation. Competitive team sports and tournaments are the “bread and butter” of *Placer Valley Tourism*. Existing venues attract numerous tournaments and sports events – Placer Valley will host (in June, 2009) the Sierra Century, a major cycling tour event and Westfield Galleria at Roseville hosts Sacramento Capitals Teams Tennis. In addition, Placer Valley offers a cluster of over twenty-five golf courses ranging from short, par-three to world-class courses such as Catta Verdera Country Club, a tournament host for the Ladies Professional Golf Association (LPGA).

Boating and associated activities are available at Folsom Lake State Recreation Area, with other recreation activities including local parks and open space lands. Placer Valley also offers a road cycling start point into the low foothills and the Gold Country region.

Leisure Recreation. Thunder Valley Casino is a significant player for Placer Valley tourism and recreation, providing the largest casino enterprise in the wider Northern California region. The Westfield Galleria at Roseville is the largest shopping complex in the region; it includes national brand retail as well as many new up-market shops. An emerging sector of fine-dining establishments rounds out leisure recreation opportunities.

Agri-tourism. Placer Valley offers agri-tourism opportunities through the Farm and Barn Tour and serves as an important access to the low foothill and Gold Country agricultural regions.

Heritage. In addition to several historical sites and museums, the Maidu Interpretive Center provides a significant cultural heritage opportunity with new museum buildings opening in late 2009. As with agri-tourism, Placer Valley provides an eastern jump-off for the Heritage Trail tour.

Arts. Placer Valley communities feature commercial art galleries and theaters, with a community arts event prominent in Lincoln. Several art shows take place in Rocklin each year. Community theater performances are available at the Magic Circle Theater in Roseville and at Historic Finnish Temperance Hall in Rocklin. An outdoor theater experience also takes place each summer featuring free Shakespeare performances in Rocklin.

Table IV-1
Placer Valley: Travel Products and Experiences

Region: Placer Valley / Lead: Placer Valley Tourism		
Products and experiences	Description	Providers
Outdoor Recreation	<ul style="list-style-type: none"> • Competitive Team Sports • Boating • Road cycling • Golf 	<ul style="list-style-type: none"> • Private sector business • Public Parks and Recreations • Event managers
Leisure Recreation	<ul style="list-style-type: none"> • Gaming • Destination Shopping • Destination Dining 	<ul style="list-style-type: none"> • Private sector business • Tribe
Agri-Tourism	<ul style="list-style-type: none"> • Farm and Barn Tour • Placer Grown • Farmers markets 	<ul style="list-style-type: none"> • Private sector business • Growers associations • Placer County • Event managers
Heritage	<ul style="list-style-type: none"> • Museums • Maidu Interpretive Center • Heritage Trail 	<ul style="list-style-type: none"> • Not-for-profit • Placer County • Tribes
Arts	<ul style="list-style-type: none"> • Galleries • Art festival • Theater and Civic Center 	<ul style="list-style-type: none"> • Private sector businesses • Placer County • Event managers

Opportunities and Constraints

The following section outlines a series of tourism development opportunities and associated constraints to development as discussed in the executive interviews and observed during research activities.

Image/Brand Development. Placer Valley is positioned as a “lifestyle” destination based on competitive team sport venues, meeting facilities, gaming, and high quality shopping. Moreover, Internet marketing information leverages nearby amenities and, in effect, also positions the Placer Valley region as providing access to the Gold Country foothills and beyond. These focused products will allow the region to develop a clear image in the market place.

While travel products are currently being marketed and are attracting visitors, Placer Valley is a destination in-progress, with the greatest impact on the region's destination status reliant on future development. Several significant projects are either in development or planning stages, including a large sports complex, a conference center, and additional lodging properties. These will allow a very focused advertising and branding program, but until then, *Placer Valley Tourism* must promote a relatively un-branded destination, and widen its appeal as much as possible.

Organization. *Placer Valley Tourism* has provided the region with a vision and has been very successful in vesting the region's stakeholders in this vision. This is not a small accomplishment. While a relatively young organization, it has already engaged in marketing activities and facility development advocacy. However, this development organization must coalesce multiple participants, with these participants raising new funding sources during a difficult economy. Accomplishing its goals will require sustaining its leadership approach and funding over the long term.

Visitor Information. *Placer Valley Tourism* has provided a comprehensive on-line visitor information presence and associated collateral materials. However, the bulk of information is likely being accessed at individual hospitality businesses either through Internet links or on-site. This means each enterprise must ensure that it is on message and that its staff is fully knowledgeable about the visitor product in Placer Valley.

Outdoor Recreation. The promotion of competitive sports venues appears to be an excellent fit for Placer Valley. It already has several facilities that are attracting team competitions and tournaments; with an expanded sports tourism infrastructure, Placer Valley can significantly grow this market. In addition to dramatic growth and high-income housing development in recent years, the region has added several superb golf facilities. Placer Valley also provides access for road cycling into the lower foothills and Gold Country region.

The potential for Placer Valley is in its future plans – when developed, they will firmly position the region as a sports tourism destination. Until then, *Placer Valley Tourism* must continue to pursue sports tourism planning while marketing existing facilities. While other outdoor recreation is available, most is oriented toward resident populations. With the exception of Folsom Lake and open space reserves, there are no significant amounts of publicly managed forest or river resources. Many golf courses are private clubs.

Touring and Leisure Recreation. Placer Valley has recently established itself as a gaming destination with the highly successful *Thunder Valley Casino*. In addition, the area offers the region's newest and largest shopping complex which has, even in an uncertain current economy, gone through a successful expansion into high quality shopping venues.

In addition, a number of fine dining establishments – Crush 29, Paul Martin’s American Bistro Restaurant, Tres Agaves, Ruth’s, Suede Blue, and McCormick & Schmicks -- indicate a trend toward increasing culinary offerings. The Fountains Lifestyle Center, the first of its kind in the Sacramento Region, offers a pleasant, open-air environment of specialty stores and restaurants, with fountains and seating areas designed for social gathering. Finally, Placer Valley provides western access to agri-touring and wine tasting in the Gold Country region.

While fine dining is a growth sector, the region is still developing a culinary sector that can attract travelers solely focused on culinary destinations (the “foodie” market). Also notable, the Maidu Interpretive Center awaits the opening of its new building, with future development eventually increasing this attraction’s visibility and a link to other regional heritage attractions.

Funding. A Business Improvement District (BID) provides a room night allocation for marketing and project development advocacy. However, any growth in these funds is dependent on hospitality industry participation and lodging property development. The current economic contraction has temporarily stalled some hospitality development and could create a longer time frame for *Placer Valley Tourism’s* project goals.

Table IV-2
Placer Valley: Development Opportunities and Constraints

Region: Placer Valley / Lead: Placer Valley Tourism		
Development Issue	Opportunities	Constraints
Image/Brand Development	Sub-urban leisure recreation destination, featuring gaming, shopping, fine dining, golf, and destination team sports venues.	A maturing destination with many amenities and facilities either under construction or planned for future development. “Lifestyle” branding in-progress.
Organization	A dynamic lead organization coordinates a focused group of stakeholders providing development support.	Young organization primary leading effort to develop facilities; for development to occur needs significant cooperation and funding.
Visitor Information	Lead provides Internet and collateral destination information including an events calendar with links to associated attractions.	Information materials are primarily available at individual attractions, with the quality of information provided during trip dependent on hospitality staff.
Outdoor Recreation	PV is positioned as a competitive team sports events venue, attracting league and tournament play.	A still-developing team sport destination is leading efforts to develop additional sports venues. Limited public lands.

Region: Placer Valley / Lead: Placer Valley Tourism (cont)		
Development Issue	Opportunities	Constraints
Outdoor Recreation (cont)	A number of high quality golf courses.	Many private membership courses.
Touring and Leisure Recreation	Destination gaming, high quality shopping complex, fine dining.	A developing fine dining sector. Casino adapting expansion plans to current economics.
	Portal for heritage and agri-tours, wine tasting primarily located in Gold County.	Maidu Interpretive Center undergoing development, tour signage not yet developed.
Funding	BID room contribution to project development and marketing budgets.	Funding and future projects will rely on hospitality industry support. Current economy.

Recommendations

Through joint partnerships and concerted marketing efforts, Placer Valley's lead organization *Placer Valley Tourism* continues to move toward positioning the region as appealing to a wide-ranging marketplace.

Image/Brand Development. The leadership and development plans for Placer Valley are genuinely dynamic. Image and branding can be improved thematically and visually to project exciting current and future possibilities.

Organization. The organization and its advocacy and leadership style needs to be maintained to ensure long-term momentum for the region.

Visitor Information. We suggest adding the elements of the Placer Arts Calendar to a comprehensive event schedule with special vetting to highlight visitor-oriented events. Since the region is driven by private sector hospitality businesses, we recommend either a formal hospitality program or at the least an employee-focused travel guide that will provide frontline hospitality workers with an information resource so they can convey all the offerings of the area to their customers. Ensure that private sector hospitality businesses have adequate information materials and/or displays of materials about Placer Valley offerings.

Outdoor Recreation. Continue to pursue the current sports tourism marketing and facility development strategy, and to the extent feasible, generate additional funds to shorten project implementation timelines.

Touring and Leisure Recreation. When completed, the Maidu Interpretive Center will be a signature attraction. Continue current promotion of interpretive programming, and concurrently communicate near and long term project expansion and implementation. The newly minted “locavore” culinary trend is ideally suited to Placer Valley’s emerging restaurant sector. Featuring Placer Grown ingredients in local restaurants and associated agri-tour materials can position Placer Valley as a leading edge leisure recreation destination. Finally, as mentioned in reference to heritage tourism, agri-tourism, and wine tasting, Placer Valley provides the opportunity to access these activities, which are principally located in the low foothills and Gold Country region.

Placer Valley serves as the gateway to Placer County recreation activities for those traveling east along Interstate 80 from the San Francisco Bay area and Sacramento metro areas, and the associated airports. Continue to build on concept development and marketing themes – “The Fun Starts Here!” – that can communicate to travelers that the corridor is more than a highway, and that their leisure experience can begin in Placer Valley.

Funding. Funding that is currently supporting these efforts should be maintained and any potential to increase funding should be investigated.

Table IV-3
Placer Valley: Development Recommendations

Region: Placer Valley / Lead: Placer Valley Tourism	
Development Issue	Recommendations
Image/Brand Development	Continue promoting the focused sports tourism and leisure recreation products. Utilize project-planning efforts to communicate an exciting vision to stakeholders about the region’s future. Increase marketing material and Internet sophistication to project a more exciting image.
Organization	Maintain, and to the extent feasible, increase funding to allow the organization to continue with its program and to retain professional staff. Maintain the leadership approach that has inspired stakeholders.
Visitor Information	Implement elements of the Placer Arts event calendar on the primary PVT website, focus calendar on visitor-oriented events, ensure that event scheduling coordinates with other county-wide event dates to ensure maximum attendance and to limit scheduling conflicts.
	Implement a hospitality-training program with an emphasis on increasing front line hospitality worker knowledge about activities, events, destinations, and tours throughout the region.
Outdoor Recreation	Continue to promote sports tourism development projects and, to the extent feasible, increase the timetable to bring these projects on line in the near future.

Region: Placer Valley / Lead: Placer Valley Tourism (cont)	
Development Issue	Recommendations
Outdoor Recreation (cont)	Continue to recruit golf tournaments to Placer Valley courses, and, to the extent feasible, include private course in packages golf vacations during the winter and shoulder seasons.
	Promote Placer Valley as providing road cycling access to the low foothills and Gold Country.
Touring and Leisure Recreation	Link not yet aligned museums with the Heritage Trail project. Feature the Maidu Interpretive Center as part of Heritage Trail and similar promotion.
	Revive the Placer Grown “brand” to leverage the “Locavore” culinary trend and expand into local restaurants and markets.
	Inform Placer Valley destination visitors about day travel access for agri-tours, wine tasting, and heritage sites in the Gold Country.
Funding	Insure continued and or increased funding allocations to the Placer Valley tourism organization.

Gold Country

The Gold Country region comprises the foothills of the Sierra-Nevada generally described by elevation from just below the City of Auburn up to the High Sierra snow-belt. Identified stakeholders that participate in promoting and marketing various elements of the Gold Country tourism industry include, but are not limited to the following organizations:

- Placer County Visitors Bureau
- Sierra Gateway Business Association
- Downtown Merchants Association
- Auburn Chamber of Commerce
- Old Town Auburn
- Endurance Capital
- VisitAuburn.net
- Placer Arts
- Sierra Nevada Arts Alliance
- Placer County Museums
- Placer County Agriculture
- Placer Grown
- Hospitality sector tourism businesses

Note that these listed stakeholders either represent groups that participated in the interview process and/or who were identified via the Mystery Shop investigation per Internet information search and/or regional tours. For purposes of discussion, the *Placer County Visitor Bureau* (PCVB) will be addressed as the overall marketing organization for the Gold Country region.

The Mystery Shop process also indicated that the *Placer County Visitor Bureau* is the lead marketing organization, principally due to its role as a visitor information entity, including its management of the California Welcome Center facility. While the *Placer County Visitor Bureau* has been functioning as an organization in several forms over the years, it does have an established history as a marketing and visitor information organization representing the county's Gold Country region.

Products and Experiences

The following products and experiences represent the primary attributes that attract travelers to the *Placer County Visitor Bureau*. As indicated in Table IV-4 this region possesses a wide range of activities, with no single attraction or specific activity providing, by itself, reason for destination travelers to visit Gold Country. Instead, the region offers a wide array of recreation opportunities from dispersed outdoor recreation to leisure touring, touring to agricultural destinations and festivals, cultural and heritage attractions including historic town sites, and finally arts events and galleries.

Outdoor Recreation. Throughout the assessment, this product repeatedly surfaced as a primary regional asset. This includes a full range of outdoor activities with most available on significant public land acreage, roads, trails, and waterways. Interestingly, this product does provide a marketing "hook" that can be utilized to distinguish the area from other Sierra-Nevada foothill regions. The long history of extreme endurance events like the *Western States 100* ultra-distance cross country running race and the *Tevis Cup* equestrian race may provide a unique branding opportunity.

Leisure Recreation. This product category includes touring and associated leisure travel through the area, and is supported by many product offerings with the public recreation lands and the landscape serving as a scenic background. Historic communities attract those interested in touring and strolling along their main streets; agri-tourism, including visiting wineries and wine growing areas, is certainly an automobile/vehicle touring activity; and to the extent that travelers are attracted to museums and other cultural heritage sites, these tours are part of the experience. This is an excellent opportunity to extend lengths of stay within Placer County, and for private business to generate significant expenditures at lodging properties, retail shops, and eating and drinking establishments.

Agri-Tourism. Associated with leisure recreation, this category includes travel to relatively young but growing Placer County wineries, visits to roadside produce stands and Farmers Markets, and attendance at destination festivals and events. The mild climate, rural countryside, and diverse offerings attract increasing numbers of travelers.

Heritage. By its very nature, the Gold Country region has history as a powerful defining characteristic. Fortunately, this includes both specific individual attractions such as museums (six in Gold Country with links to others county-wide), and historic town sites with many opportunities for travelers to spend time and money in these locations. Note that the recent Placer County Heritage tour event did demonstrate the viability of heritage touring as a regional and linked county-wide activity.

The Arts. Arts provide a wide array of different attractors and, as a whole, is a powerful sector that can provide cultural texture and a defining experience for visitors within Gold Country. The arts have an energetic advocate organization in Placer Arts as well as numerous dedicated individual artists, organizations, and sponsored events.

Table IV-4
Placer Valley Gold Country Travel Products and Experiences

Region: Gold Country / Lead: Placer County Visitor Bureau		
Products and experiences	Description	Providers
Outdoor Recreation	<ul style="list-style-type: none"> • Extreme sports. Western States 100, Tevis Cup • Foresthill Bridge • River sports • Bicycling – road • Bicycling – mountain • Camping • Hiking • Boating • Fishing and Hunting • OHV trails • Golf 	<ul style="list-style-type: none"> • Private sector business • Public land managers • Event managers
Leisure Recreation	<ul style="list-style-type: none"> • Auto/vehicle touring, sightseeing • Strolling historic main streets • Shopping • Dining 	<ul style="list-style-type: none"> • Private sector business • Public sector planning & development
Agri-Tourism	<ul style="list-style-type: none"> • Wineries • Mandarin Festival • Farm and Barn Tour • Placer Grown • Road side produce stands • Farmers markets 	<ul style="list-style-type: none"> • Private sector business • Growers associations • Placer County • Event managers

Region: Gold Country / Lead: Placer County Visitor Bureau (cont)		
Products and experiences	Description	Providers
Heritage	<ul style="list-style-type: none"> • Historic town sites (Auburn Old Town, Colfax) • Museums • Heritage Trail 	<ul style="list-style-type: none"> • Private sector businesses • Public sector planning and development • Placer County • Tribes
Arts	<ul style="list-style-type: none"> • Galleries • Events (art festivals, performing arts) 	<ul style="list-style-type: none"> • Private sector businesses • Placer County • Event managers

Opportunities and Constraints

The following section outlines a series of tourism development opportunities and associated constraints to development as discussed in the executive interviews and observed during research activities.

Image/Brand Development. Within Gold Country there is no predominant activity or attraction that “defines” the region. Of course, Gold Country indicates Gold Rush Era history and downtown Auburn provides a walk-able heritage environment; however there is no attractor of significant scale to by itself draw destination travelers into the immediate area. Placer County’s Gold Country is within a much larger State of California travel region, also called Gold Country, and provides access to adjacent counties that feature two State Historic Parks (Empire Mine and Marshall Gold Discovery) – as well as many other gold country attractions, communities, and marketing regions, including the Highway 49 corridor group. Accordingly, California’s regional promotion efforts do provide an opportunity for Placer County’s Gold Country to leverage this aspect of its marketing message, and extend marketing dollars attributed to Gold Rush Era heritage. Fortunately, there are many other activities and attractions, that if taken as a whole, can also position Placer County’s Gold Country as a unique multiple-activity destination.

The difficulty with having many recreation choices is a diluted image. California’s Gold Country travel region and the associated Welcome Center theme may limit branding opportunities, and there are also many other entities using the Gold County brand image. Marketing and advertising, Internet sites, and collateral materials currently deliver many themes, designs, and messages leaving a confused impression about exactly why a visitor should travel to and stay within the Placer County Gold Country. While combining all of the region’s offerings into a clear coherent message will be challenging, a lead marketing organization with the support of stakeholders, associated

tourism entities – and with an adequate budget – could craft a clear compelling marketing message and significantly increase visitation and lengths of stay.

Organization. The *Placer County Visitor Bureau* has gone through several iterations over the years, with the current organization stabilized and led by a seasoned tourism marketing professional. Make no mistake, organizational development within the diverse tourism industry is not an easy task, so the present sense of stability is important. Underlying the success of an organization is its stakeholders – and the *Placer County Visitor Bureau* has a highly enthusiastic group of supporters that can drive an overall marketing and development effort.

Unfortunately, the *Placer County Visitor Bureau* is under-funded to provide a strong regional marketing presence. Part of this is due to its responsibility managing the California Welcome Center. While the Welcome Center can provide a great opportunity to disperse travelers within Placer County, the time and cost significantly cuts into marketing programming. Other reasons for funding limitations are the limited amount of accommodations facilities in its jurisdiction.

Visitor Information. The California Welcome Center and the associate *Placer County Visitor Bureau* Internet site provide valuable point-of-entry information for those seeking guidance prior to and during a visit in Placer County. The Center provides all available information about activities and attractions within Placer County and surrounding regions. In addition, Placer Arts has developed a comprehensive arts events calendar that is also available on-line. Comprehensive regularly updated events calendars are difficult to manage, and Placer Arts has made an important contribution to the Placer County tourism sector.

On the other hand, the Welcome Center is located in a relatively unattractive building, situated in a low visibility location that provides difficult ingress. Essentially, a traveler has to be very motivated to obtain information at the Center. Materials within the Center, while comprehensive, offer no visually-related set of material for Gold Country, and can be overwhelming without staff assistance. Welcome Center operation also requires statewide marketing materials, a large portion of which applies to areas of the state that are geographically distant. The Center does provide restrooms, which can be a very useful amenity to first attract, then hopefully provide, information to visitors. The Arts calendar, while an invaluable achievement and useful information tool, does include many locally-oriented events and, as a result can provide a little too much information that could discourage all but the most conscientious information seeker.

Outdoor Recreation. There are simply too many interesting activities available within Gold Country to provide a deep discussion of each. This is a good thing, and indicates that the potential to attract and capture travelers is significant. Interestingly, the most emphasized attributes during the interviews pointed to the wide array of outdoor recreation activities and the supporting mild climate, terrain, and access from large regional markets. Significant state and federal public lands provide many recreation

venues with trail systems, river sports, boating, fishing, and camping among the offerings. These may be showcased by two extreme endurance events – the Western States 100 off-road running race, and the Tevis Cup off-road equestrian event. In addition, the dramatic Foresthill Bridge could provide a special venue for a high visibility, extreme sports event such as base jumping, para-gliding, or bungee – events held at other locations around the country with similar high-elevation, single-span bridges. Finally, Gold Country is a hidden resource for both road and trail bicycling, with many participants traveling to the region for each. It does appear that this market segment can be further developed and generate significant overnight visits. Interestingly, during the Mystery Shop tour, we encountered a bicycle shop owner who was running a group mountain bike rental program to arriving Europeans – it is most striking to note that these visitors flew into Sacramento and traveled directly to this foothill business solely to cycle Gold Country’s off road trails.

Related to the visitor information category, the wide array of outdoor recreation activities does provide the traveler with a challenge – the sources are numerous – and no comprehensive recreation activities guide(s) exist (though there are many guide books that an enthusiast can purchase.) Extreme sports – particularly those that might include the Foresthill Bridge as a venue – will be challenging in terms of permitting, insurance costs, sponsorships, and participant and spectator access and parking. Finally, the Gold Country region cries out for a signature cycling event to publicize the region’s road and off-road cycling resources.

Touring and Leisure Recreation. While agri-tourism, wine tasting, and cultural/heritage activities and attractions are recreation “activities” in themselves, these offerings best lend themselves as elements of regional touring. Agri-tourism already generates visitation to events and to visitor-friendly stops and roadside stands. Wine tasting, while small-scale in Gold Country, has tremendous potential – especially with the newly adopted Placer County wine tasting and touring ordinance.

The Heritage segment, of course, is a natural fit in the Gold Country – already a successful model Heritage Trail event has established the viability for this kind of regional tour. Historic town sites such as Auburn Old Town and Colfax offer the opportunity to stop, stroll and spend money at retail and eating and drinking establishments in a history-laden setting. Auburn, in particular, may provide an opportunity to market “hub and spoke” tours with travelers leaving from, and then returning to, Auburn after their tour. Finally, each of these touring elements – agri-tourism, farmers markets, wine tasting, and heritage – could be packaged or marketed as complete touring experiences.

Limitations within the touring/leisure recreation segment are largely confined to the scale of the current offerings – wineries are small-scale and generally operate somewhat limited tasting room facilities – and the county has only recently established parameters for touring and wine-tasting businesses. Recent housing development has reportedly consumed some agricultural lands, though the existing agri-tourism sector looks stable.

Heritage tours largely rely on small museums, and these facilities need to work cooperatively to provide a heritage tourism critical mass. Lodging is somewhat limited in scope, though there are several proposed new lodging properties on the horizon. Historic town sites sometimes function as “stand alone” destinations and do not have the depth of authenticity or development amenities to do so – cooperative marketing is essential and necessary. Finally, touring needs a viable tourist-oriented directional signage system. This is particularly useful for wine tours, but can also be applied to other agri-tourism and heritage destinations.

Funding. Fortunately the Gold Country region receives contributions from county TOT receipts, though these are allocated by jurisdiction, leaving the *Placer County Visitor Bureau* with limited amounts for a lead marketing organization. It should be noted that around the country, economic difficulties are making TOT allocations potentially attractive funds for other public sector expenses, thus threatening tourism development efforts.

Tourism is technically an export industry – in this sense Gold Country “exports” an experience while taking in expenditures by visitors – thus, TOT allocations provide a return on investment in the form of additional TOT receipts, sales taxes, and expenditures that support employment. Accordingly, it should also be noted – with emphasis – that each of the stakeholder tourism development organizations relies on legions of volunteers. In that sense, funding – including public funding through TOT allocation – seeds significant amounts of in-kind contributions. Clearly, these public investments can create direct community development and community cohesion benefits throughout the county and region.

Table IV-5
Gold Country: Development Opportunities and Constraints

Region: Gold Country / Lead: Placer County Visitor Bureau		
Development Issue	Opportunities	Constraints
Image/Brand Development	Many diverse and yet related attributes, including a wide array of activities that can attract visitors to and extend stays within Placer County.	A diffused image/marketing messaging. A single image or signature event is lacking. Many independent stakeholders not fully coordinated with a lead marketing organization to formulate an overall objective.
	Leverage existing brands including the State of California Gold Country travel region, and gold country attractions and travel corridors in areas adjacent to Placer County.	California Welcome Center may limit branding opportunities other than “Gold Country”. There are multiple players using the Gold Country theme.

Region: Gold Country / Lead: Placer County Visitor Bureau (cont)		
Development Issue	Opportunities	Constraints
Organization	An established lead marketing organization. An enthusiastic group of stakeholders providing tourism sector development with significant "horse-power".	The organization is under-funded with a large portion of the marketing budget allocated to the Welcome Center facility. Multiple efforts largely uncoordinated and driven by individual entity objectives rather than a region-wide development plan.
Visitor Information	Welcome Center provides a California-wide presence and venue for distributing information that can extend stays throughout Placer County. Related Internet presence.	The physical Welcome Center facility is unattractive and located in a low visibility, difficult-to-access site. Requires distribution of statewide materials. Maintenance of the center is a significant portion of the PCVB budget. Internet, advertising and collateral materials derive from many independent sources with apparent limited coordination.
	Events calendar developed by Placer Arts is comprehensive and already available	Current calendar includes both local and visitor destination events which may crowd information needed by potential visitors.
Outdoor Recreation	Gold Country provides an astounding array of activities that can attract a wide audience within easy drive distance from large regional markets.	No single asset is enough by itself to generate significant visitation or define the region with an image. These activities must be bundled to attract multi-activity oriented visitors.
	Extreme sports, Foresthill Bridge provide opportunity to increase market visibility.	Extreme events may require special permitting and high insurance costs. Venue and spectator parking issues.
	Significant numbers of outdoor activities, which cover the full outdoor recreation spectrum, are available on public lands in a mild, year-round climate.	Information coordination limited with public land managers and associated private recreation providers offering very diverse but limited information sources. There appear to be many unpublicized or unknown recreation opportunities on the public lands within Gold Country.
	Bicycle touring, training, road and trail riding. Existing rental and full service shops. Indications that destination riding is occurring. Large highly active regional markets.	Limited information for cycling enthusiasts. No current signature event to publicize opportunities for this market niche.

Region: Gold Country / Lead: Placer County Visitor Bureau (Table IV-5 continued)		
Development Issue	Opportunities	Constraints
Touring and Leisure Recreation	Agri-Tourism and associated wine tasting opportunities offer year-round and seasonal activities. Venues including farmers markets and on-site produce stands or wine tasting facilities.	Wine industry in Placer County is in its infancy and will need permitting and other assistance. Wineries may be located in mixed-use areas not open to increased visitation. Wine tasting ordinance only recently passed. Tour signage not yet developed.
	Heritage Trail event and information show tour viability; model for ongoing touring and events, linkage to PC wide tours.	Need to increase facility development, exhibit sophistication, and stakeholder cooperation county-wide. Tour signage not yet developed.
	Historic Auburn provides potential for hub and spoke tours. Current and proposed lodging.	Coordination between City of Auburn and tour associated stakeholders. Limited lodging not yet at critical mass for significantly increasing overnight stays.
Funding	Room tax funds contribute to marketing organization budgets.	Lead marketing organization has limited budget and TOT base. Other funding dispersed among stakeholders. Fire priority may limit funds for public land recreation. Current economy.

Recommendations

The following section outlines a series of recommendations that can enhance Gold Country’s tourism development effort and generate increased visitation, extended lengths of stay, room nights, and associated expenditures.

Image/Brand Development. Developing a cohesive image for Gold Country will require a cooperative effort among stakeholders and increased marketing budget support for *Placer County Visitor Bureau*, the lead marketing organization. Given budget limitations for all stakeholders, this will very likely require strategy meetings, role definition and time. A cooperative strategic effort will likely include a comprehensive marketing plan that addresses targeted demographic and activity-oriented markets, goals, metrics that may measure progress, and media and public relations plans.

We recognize that given the diverse attributes of the Gold Country, brand development – particularly a dominant image – will be a challenge, but when accomplished, should provide a long-term positioning statement. As part of this effort, we recommend identifying a “signature” event that many attract media attention, a fun but compelling

image, and of course new visitors to the region. Fortunately, Gold Country has a wide array of attractive attributes from which a signature event can be identified.

Organization. Because of the wide array of offerings available to Gold Country visitors, there is no single marketing program, but a powerful range of participating entities. For this reason, region-wide marketing needs additional focus and resources. To the extent feasible, a cooperative agreement that includes in-kind and funding to an overall marketing effort should be pursued. Though it may be an initially minor point, the lead marketing organization name needs updating to a place-identifying title.

Visitor Information. Investigate the feasibility and timeline for relocating the California Welcome Center to a more accessible and visible site, including a welcoming building design or facade. Include rotating exhibits featuring Gold Country arts, heritage, or other interpretation as part of the Center's visitor-serving features. This was a primary interview recommendation, but we do recognize that it is probably a long-term effort. However, we believe this may provide Gold Country stakeholders with a cooperative and focused "bricks and mortar" project.

The Arts and Events Calendar is an excellent and useful resource, and we applaud Placer Arts for initiating this project. The calendar should be linked to as many visitor-serving Internet sites as possible. However, to allow greater utility and ease of use for out-of-area travelers looking for Gold Country information, the list of events on tourism sites should be vetted to concentrate on direct visitor-attracting activities. Finally, the most direct source of visitor information, and one that can impact travelers' length of stay during a trip, is interaction with visitor-serving business and, particularly, frontline hospitality staff. This recommendation goes beyond hospitality training, concentrating on frontline hospitality worker knowledge about the range of activities and attractions available in the region. Educating workers about the area's recreational opportunities may include developing a simple worker manual listing an activity and location inventory, inclusion of this information in new worker orientation materials, or special hospitality worker offers to visit/participate in Gold Country attractions and activities.

Touring and Leisure Recreation. The Heritage Trail museum tour is an excellent cost efficient model for publicizing touring opportunities through the region. To the extent feasible, this event should be expanded to include an on-going information piece, with a similar event tour and accompanying collateral developed for arts, agri-tourism, and wine tours. We were interested to hear about the Placer Grown program and encourage its reinvigoration. While presently identified as a "trend", seeking locally grown or produced food at restaurants or markets while traveling is on the increase. Targeting this emerging "locavore" market can help put Placer County's Gold Country on the leading edge of a very interesting and potentially lucrative niche market segment.

To allow for increased regional visitation, a way-finding system targeted at visitors and specific tours such as wineries, agri-tour businesses and heritage attractions should be

developed. Similar signage is available for wine tasting in adjacent Nevada County, and has been implemented in Monterey County among others (see Figure IV-1). Also, note that the North Lake Tahoe Resort Association is involved in a way-finding initiative for North Lake Tahoe, a useful example for Gold Country to emulate.

Funding. Economic conditions in 2009 are difficult and unpredictable. Yet Westerners, particularly Californians, are notoriously footloose and travel is part of the culture; Gold Country is fortunate to be located within easy drive time from large regional markets. These same markets may respond to a more visible region as an attractive alternative to expensive out-of-state travel destinations.

With shared TOT receipts representing a critical tool for overall tourism development, we strongly recommend that TOT allocations be maintained, at the least, and to increase funding, if at all possible. TOT receipts could be called – as suggested by one interviewed stakeholder – an “economic impact assessment” and are essentially community development revenues supporting an economic sector that generates these funds with its efforts. Accordingly, we recommend that Gold Country stakeholders confer on methods to increase funds for the *Placer County Visitor Bureau* marketing program though an increased TOT share and/or other additional contributions.

Figure IV-1
Way Finding Signage: Nevada and Monterey Counties



Sources: nswinecountry.com; Chuck Nozicka Consulting

Table IV-6
Placer Valley Gold Country: Development Recommendations

Region: Gold Country / Lead: Placer County Visitor Bureau	
Development Issue	Recommendations
Image/Brand Development	A clear focused media message including development of the Gold Country “brand” that is coordinated by <i>Placer County Visitor Bureau</i> , with support from and in cooperation with partner entities. May require a cooperative media budget with contributions by each of the various partners. Coordinated media messaging may include but is not limited to a comprehensive marketing plan, and professional advertising firm development of a logo, website, and visually and thematically related collateral materials.
	To differentiate Placer County’s Gold Country from other regions in Northern California develop a “signature event” or activity. This may include but not be limited to an extreme or endurance event, a competitive event such as a Gold Country bicycle race, the current Western States 100, a kayak festival, a stage of the Tour of California or other related dynamic attraction.
	Integrate the geographic attributes of the region into image development – including the climate, terrain, and access – along with closely related outdoor recreation activities, utilize other less visual attributes such as agri-tourism, and cultural and heritage touring to provide more focused themes. Position historic town sites as hubs in a hub-and-spoke tour approach, positioning these town sites as providing unique visitor services and amenities.
Organization	<i>Placer County Visitor Bureau</i> is in position to function as the lead marketing organization but needs a clear cooperative agreement between it and the partner organizations, including but not limited to: the City of Auburn, Placer County, Chambers of Commerce, merchants associations and related tourism development organizations. In addition, the lead organization needs a regionally identifying name – the <i>Placer County Visitor Bureau</i> title is somewhat vague and not directly connected to the region by theme. Investigate renaming the lead marketing organization with a place-identifying title such Placer Gold Country, Placer Sierra Foothills or another title that may better associate with location or local geography.
Visitor Information	The Welcome Center, if maintained, should be relocated to a visible gateway-oriented location such as the Bowman redevelopment area. To the extent feasible, site the center at an easily accessible vista point.
	Implement elements of the Placer Arts event calendar on the <i>primary</i> Gold Country website, focus calendar on visitor-oriented events, ensure that event scheduling coordinates with other county-wide event dates to ensure maximum attendance and to limit scheduling conflict.

Region: Gold Country / Lead: Placer County Visitor Bureau (cont)	
Development Issue	Recommendations
Visitor Information (cont)	Implement a hospitality training program with an emphasis on increasing front line hospitality worker knowledge about activities, events, destinations, and tours throughout the region.
Outdoor Recreation	Work with public land managers to gather information and then develop an accurate and comprehensive activity guide(s) including directions/mapping to outdoor recreation sites.
	Determine long-term feasibility of extreme sports events. Assessment may include potential market demand for participants and spectators, seasonality, permitting and insurance requirements, venue availability, traffic access and parking.
Touring and Leisure Recreation	Expand the Heritage Trail project and utilize this model for other linked Placer County-wide attractions.
	Revive the Placer Grown “brand” to leverage the “Locavore” culinary trend and expand into local restaurants and markets.
	Identify potential performance arts venues including outdoor theater, concert series and locations for arts festivals and events. To the extent feasible, create an on-line Placer Arts “gallery” where local art products may be purchased or displayed along with artist information.
	Develop a tourist oriented signage/way-finding system for wineries and heritage attractions. Coordinate with adjacent foothill counties.
Funding	Insure continued and or increased TOT allocations to the Gold Country tourism organizations. To the extent feasible, develop cooperative agreement to substantially increase the budget for the lead marketing organization.

High Country - North Lake Tahoe

Lake Tahoe and the surrounding alpine environment is an internationally-known destination – and for domestic and especially California travelers – the region represents an iconic alpine lake recreation area. High Country/North Lake Tahoe (NLT) comprises the western slopes of the High Sierra, the Lake Tahoe Basin proper, and adjacent alpine destinations. In short, this region provides a comprehensive array of outdoor recreation opportunities in a stunning alpine environment. No other location in the far western United States offers the combination of alpine lake setting, visitor amenities, and access.

The lead Placer County organization for Lake Tahoe is the North Lake Tahoe Resort Association (NLTRA), a nationally recognized tourism development entity. It is important to note that unlike many similar organizations representing international destinations, the NLTRA operates in a highly-regulated environment overseen by an array of public management entities. While not all of the following are NLTRA members, they do represent the functional stakeholders in NLT tourism development programming.

- North Lake Tahoe Resort Association
- Destination resort companies
- Recreation providers
- Lodging, retail, and restaurants
- Not-for-profit organizations
- Chambers of Commerce
- Environmental advocates
- Public agencies

In order to both efficiently and successfully promote the region in the context of an unique environment, NLTRA has operated according to a documented planning strategy including: 1) *North Lake Tahoe Tourism Development Master Plan 1995*, 2) *North Lake Tahoe Tourism and Community Investment Master Plan 2004*, and 3) annual project objective and result reports. In summary, the NLTRA operates with significant due diligence, and serves Placer County as a model tourism development organization.

Products and Experiences

There is very little that can be added to the scope of offerings available in High Country-North Lake Tahoe; it is simply a world-famous destination. The attributes, as indicated in Table IV-6, summarize the region's products and experiences by category, with the menu of products and experiences representing an exemplary visitor attraction; in fact, North Lake Tahoe offers the highest concentration of ski resorts in North America.

Outdoor Recreation. The North Lake Tahoe setting is first among outdoor recreation attributes. Nearly every outdoor activity has as its backdrop the deep blue waters of Lake Tahoe and the surrounding mountain landscape. The winter season offers a full range of outdoor sports, with resort services provided by a number of destination alpine ski and snowboard properties. Non-resort based activities also include a full array of snow sports from snow play to cross-country and snowmobiling.

Summer and shoulder seasons provide a similarly stunning setting and exemplary array of seasonal activities from hiking, bicycling and golf, to camping boating and fishing. Miles of beaches offer a relaxing setting for families, couples or individuals looking for a little peace and tranquility. Community parks and recreation departments provide another set of outdoor recreation-oriented amenities, which also appeal to some visitors.

Touring and Leisure Recreation. Touring the region by automobile, bicycle, motorized boat, and paddle craft are popular activities, with many photo-friendly viewpoints and scenic waysides. Lakeshore town sites offer opportunities for shopping, dining, and strolling. Destination resorts have developed pedestrian villages in recent years, adding to the leisure recreation amenities. Casino gaming is also available on the Nevada side of the Lake.

Agri-tourism. A summer season farmers market is offered each week at various locations throughout North Lake Tahoe, and features many Placer County growers.

Heritage. Several small museums and historic sites are easily accessible in High Country-North Lake Tahoe. A new Maritime museum has opened, a Ski Museum is proposed, and a celebration for the 1960 Olympic 50-year anniversary is upcoming.

Arts. High Country-North Lake Tahoe has a thriving arts community with many artists selling their work at local galleries and arts festivals. Various communities in North Lake Tahoe offer performing arts venues, with music in community parks, a public community arts center, and theater performances at purpose built facilities.

Table IV-7
High Country-North Lake Tahoe: Products and Experiences

Region: High Country North Lake Tahoe / Lead: North Lake Tahoe Resort Association		
Products and experiences	Description	Providers
Outdoor Recreation	<ul style="list-style-type: none"> • Scenic natural setting • Nationally recognized four season alpine resort destination • Full spectrum of winter sports • Full spectrum of summer and shoulder season sports including waterborne recreation. 	<ul style="list-style-type: none"> • Private sector business • Public land managers • Community Parks and Recreation • Event managers
Touring and Leisure Recreation	<ul style="list-style-type: none"> • Walkable townsites and resort villages • Shopping • Dining • Auto, bicycle, and boat tours • Gaming 	<ul style="list-style-type: none"> • Community development • Private sector business
Agri-Tourism	<ul style="list-style-type: none"> • Farmers market 	<ul style="list-style-type: none"> • Private sector business • Growers associations

Region: High Country North Lake Tahoe / Lead: North Lake Tahoe Resort Association (cont)		
Products and experiences	Description	Providers
Heritage	<ul style="list-style-type: none"> • Museums • 1960 Olympic Anniversary • Heritage Trail 	<ul style="list-style-type: none"> • Not-for-profit • Placer County
Arts	<ul style="list-style-type: none"> • Galleries • Art festival • Theater 	<ul style="list-style-type: none"> • Private sector businesses • Placer County • Event managers

Opportunities and Constraints

The following section outlines a series of tourism development opportunities and associated constraints that characterize tourism development in High Country-North Lake Tahoe. As may be apparent from previous comments, the consultant regards the NLTRA as a model tourism development organization and one that should be replicated. As a result, there appear to be very few opportunities that the NLTRA has not already recognized. However, as we will mention repeatedly, the NLTRA operates in a highly regulated and sometimes contentious public environment. This more than any other constraint makes the NLTRA effort different – and more challenging – than their competition in the Rocky Mountain states, Canada, and even in the Southern Sierra.

Image/Brand Development. Iconic Lake Tahoe provides a striking back drop for marketing nearly every recreational opportunity, and the NLTRA makes full use of this unique selling proposition. Furthermore the NLTRA wisely participates in cooperative efforts with adjacent and affiliate organizations to grow the overall destination market. However, destination resort marketing is a high-stakes proposition with many national and international destination resorts competing ferociously for a lucrative visitor market. Fortunately, High Country-North Lake Tahoe has easy access from some of California’s largest population centers, with close proximity to several international airports. Consistently promoting the high visibility of Lake Tahoe serves to remind travelers that North Lake Tahoe offers a natural setting unique in alpine destinations.

Organization. Over many years of work, the NLTRA has evolved into a model organization driven by strategic planning and excellent relationships with decision-makers and stakeholders, who at times seem to watch every move in the Lake Tahoe Basin. The organization has excellent leadership, a board of directors and several community committees, and has provided very valuable advocacy for local communities and the tourism sector as a whole. NLTRA activities are driven by published strategic plans and progress reports providing excellent accountability. However, any NLT tourism industry development must consider the regulatory climate, which can slow development projects. Public stakeholders also must be heard, and for

various reasons, may be less than enthusiastic about sharing “their” Lake Tahoe with visitors from outside the area.

Visitor Information. Internet-based information is excellent and provides cooperative linkages to partner organizations in the NLT region. Collateral material is available at visitor servicing establishments throughout the area. The organization also operates (or co-operates) Visitor Information Centers or kiosks that service walk-in traffic and can extend lengths of stay or encourage repeat visits for travelers who might otherwise not recognize the wide array of offers in NLT. Finally, the NLTRA provides a lodging referral system that delivers consumer inquiries directly to property websites for fulfillment.

Note that visitor information services are often asked to go beyond information and promotion. Stakeholders in the region put information about environmental sustainability at the top of priority lists, and the NLTRA must balance this input with their core mission to develop and market a sophisticated alpine resort destination.

Outdoor Recreation. NLT utilizes the full spectrum of recreational opportunities to attract visitors to the region. Public land managers and private sector recreation providers offer excellent access to the Lake and some of the finest alpine beaches in the world. A highly developed network of hiking, biking and touring trails connects routes throughout the area. However, during peak use periods – particularly during the summer season – many of these facilities can become over-crowded with associated environmental concerns heightened. In addition, some outdoor recreation uses may be either limited to certain areas or restricted due to environmental regulations.

Touring and Leisure Recreation. Leisure recreation includes touring – spending time to explore the region, view the sights, and enjoy the North Lake Tahoe atmosphere – and simply relaxing in the high alpine Lake environment. Auto, bicycle, motor and paddle watercraft, and walking tours at Lake Tahoe are very popular activities, and the area is easily marketed to those wanting to see this remarkable alpine lake from every vantage point. In addition, the region offers numerous heritage opportunities, including but not limited to, sites such as Vikingsholm Castle, Erhman Mansion, and the Gatekeepers Cabin. Historic sites with supporting interpretive information are found throughout North Lake Tahoe as well. Several unique museums, including the newly opened Maritime Museum, also provide activities for those interested in Lake Tahoe heritage. Finally, an array of leisure activities, including but not limited to, simple strolling, shopping, dining, entertainment, and art galleries, are featured in North Lake Tahoe’s walkable town sites and resort villages accessible from many associated lodging choices.

Peak season automobile traffic can impact the recreation experience and slow touring activities. In response, the NLTRA has led an effort to provide more walkable places that will encourage visitors to drive less, spend more time in North Lake Tahoe destinations, stay longer in accommodations and, thus, spend more dollars within Placer

County. However, the oft-mentioned regulatory framework can substantially slow redevelopment efforts. In addition, the seasonal nature of alpine destinations can challenge businesses if travel season cycles do not produce expected revenues.

Funding. The NLTRA is largely dependent on TOT allocations but has used these funds to leverage membership fees, and many grant dollars. Even so, funding is relatively modest for the hyper-competitive destination travel market. The current economic contraction and any associated budget reductions could substantially hinder the NLTRA development effort.

Table IV-8

High Country-North Lake Tahoe: Development Opportunities and Constraints

Region: High Country-North Lake Tahoe / Lead: North Lake Tahoe Resort Association		
Development Issue	Opportunities	Constraints
Image/Brand Development	Internationally recognized, premier alpine mountain destination featuring multiple year-round attractions on the shores of iconic Lake Tahoe. Easy access via air and auto travel from major national and international markets. Cooperates with South Lake Tahoe and Reno marketing organizations to grow destination visitation.	Operates in a highly regulated environment. Destination resort markets defined by high dollar marketing and development expenditures, and fierce competition. A high stakes, high dollar sector.
Organization	Model tourism development organization. A dynamic lead that implements a well-vetted and comprehensive development planning and marketing strategy. Provides voice for predominant tourism and recreation industry in a highly regulated environment.	Public environment and region's status as an exemplary natural setting generates many competing stakeholders. All issues pertaining to tourism development must be vetted in public forum and yield to permitting review and regulatory framework.
Outdoor Recreation	A stunning range of four season recreation activities along the shore of alpine lake. Readily accessible public forest and beaches. Significant visitor serving infrastructure.	Highly regulated environment can limit certain activities by place and volume. Peak use characterizes recreation patterns.

Region: High Country-North Lake Tahoe / Lead: North Lake Tahoe Resort Association (cont)		
Development Issue	Opportunities	Constraints
Touring and Leisure Recreation	Destination gaming, walkable town sites and resort village complexes, shopping and dining. Scenic touring by auto and private boat.	Highly regulated environment slows redevelopment efforts. Peak season use can create crowded roadways. Seasonal business cycle can be a challenge for small business owners. Signage and waterborne transit limited at this time.
	Noteworthy heritage and art attractions that link with other Placer County regions.	Linkages to other Placer County regions not fully realized.
Funding	Room tax funds contribute to project development and marketing budgets. Has leveraged TOT allocations to create partnerships, cooperative marketing, and significant grant funding from both California and Nevada.	Funding is modest for competition in international resort destination realm. Current public budget limitations threaten sustainable development effort.

Recommendations

In the following section, we suggest a series of approaches that may enhance continued NLT tourism development. Please note that we regard these recommendations as minor adjustments to a program that has a demonstrated track record of success both in promotion and in tourism product development despite a highly challenging environment.

Image/Brand Development. Very simply we recommend continuation of the current image and branding approach. It has evolved and continues to evolve with the market, and promotes the NLT region with a high-quality message.

Organization. We view the NLTRA as critical to sustaining the North Lake Tahoe tourism industry through the current economic contraction, and to continue to plan and advocate future development. A consistent message is all-important in the competitive destination market. Moreover, the NLTRA provides an invaluable role as an industry advocate, without which, the regulatory framework may not view NLT with a balanced perspective.

Visitor Information. As with other regions, we recommend that the NLT region access and use elements of the Placer Arts comprehensive calendar – with visitor-oriented events listed. Given the regulatory and sensitive natural environment, a “green user guide” or other concept should be applied to visitor information – and, if done properly

– in marketing materials. Green destinations are big business, and NLT is the perfect place to utilize this message. In addition, the region’s natural environment must be sustained in order to ensure a vibrant recreation economy for decades to come.

Outdoor Recreation. Peak season periods can become over-crowded and seasonal cycles can challenge hospitality businesses, especially proprietor-owned enterprises. Additional shoulder season promotion can add off-peak business and shift to shoulders some peak use that would be valuable for revenue and environmental relations. A definition of shoulder season must be developed and agreed upon with stakeholders, that recognizes the seasonal and geographic differences within North Lake Tahoe.

Touring and Leisure Recreation. The successful Heritage Trail pilot project was unable to entice NLT heritage entities’ interest in the event. Yet NLT has excellent heritage facilities that could attract a specific enthusiast market not generally driven to visit alpine places like NLT. The Maritime Museum, the proposed Ski Museum at Squaw Valley, and the 1960 Olympic 50-year anniversary celebration would fit nicely into an expanded Heritage Trail program. In addition, heritage promotion during the off-season could allow NLT to attract an excellent shoulder season visitor population that might not otherwise visit the NLT during the shoulders. Finally, promoting the Placer Grown tag in local restaurants can help the NLT region stay on the leading edge of culinary tourism and take advantage of the “locavore” trend.

Funding. Clearly, we recommend maintaining the Placer County’s TOT allocations at least at historic levels. The NLTRA provides critically needed marketing strength and industry support for this part of the County’s travel sector. Moreover, as was indicated consistently throughout all the interviews, NLT provides an “anchor” for travel to and within other parts of the County. To a degree, other Placer County regions depend on the success of NLT. Funding levels and the expertise of the NLTRA have also allowed the organization to leverage its operating funds and win valuable matching grant funds. Finally, given the years of marketing expertise, project development, and relationship building, as well as the national reputation and the results accomplished, the NLTRA could not be easily replicated again if program contraction occurred now.

Table IV-9
High Country-North Lake Tahoe: Development Recommendations

Region: High Country-North Lake Tahoe / Lead: North Lake Tahoe Resort Association	
Development Issue	Recommendations
Image/Brand Development	Continue promoting current brand and image.
Organization	Maintain, and to the extent feasible, increase funding to allow the organization to continue with its program and to retain the professional staff. Maintain the leadership approach that has galvanized industry stakeholders and provides advocacy for industry operating in highly regulated environment.

Region: High Country-North Lake Tahoe / Lead: North Lake Tahoe Resort Association (cont)	
Development Issue	Recommendations
Visitor Information	Review available event data on the Placer Arts calendar that could be added to the primary North Lake Tahoe website events calendar; focus this optional information on visitor-oriented events; ensure that event scheduling coordinates with other county-wide event dates to ensure maximum attendance and to limit scheduling conflict.
	Maintain visitor information center in Tahoe City and other similar facilities. Integrate “green” messaging into visitor information.
Outdoor Recreation	To the extent feasible, promote shoulder season use that may ease some peak season impacts.
Touring and Leisure Recreation	Link not yet aligned museums and arts events with the Heritage Trail project and Placer Arts programs. Feature the new Maritime Museum, 1960 Olympic 50-year anniversary in Heritage Trail program.
	Use the Placer Grown “brand” to leverage the “Locavore” culinary trend and expand into local restaurants and markets.
Funding	Insure continued and or increased TOT allocations, continue to leverage these funds with cooperative marketing and available grant funds.

Intra-Region Marketing Opportunities

As part of the assessment process, we asked those interviewed if there existed any potential cross-marketing links between Placer County’s regions. We also observed what products or experiences might lend themselves to intra-county linkages. The following table summarizes these primary linkage opportunities, with most mentioned in each region’s assessment. This section is intended to present potential opportunities for cross-regional joint marketing and product development that may initiate a discussion about cooperative activities among the three sub-county regions.

In several cases, these linkages are occurring de facto. For example, the Placer Valley web site lists opportunities to visit Gold Country agri-tourism and wine tasting destinations via site links. The Heritage Trail event was a successful template and indicated that this particular product area may be an ideal cooperative project for all three Placer County regions. Outdoor enthusiasts that investigate information resources such as National Forest or State Recreation Area maps in one sub-region may travel to public lands in another.

Finally, we have included a category for cooperative marketing opportunities with adjacent regions outside of Placer County. Since visitors typically do not travel

according to jurisdictional boundaries, they see regions as “seamless” and seek expanded activities and attractions. Recognizing and promoting linkages can benefit all within the Placer County travel industry by providing a larger menu of travel opportunities to the potential destination and in-market visitor. Knowing that there is more to do during their trip, visitors may be influenced to extend stays and make additional expenditures in the primary sub-county regions, even though out-of-region or out-of-county attractions may be added to their itinerary.

Table IV-10
Placer County Regional Cross Marketing Ideas

Linkages: Placer Valley – Gold Country – High Country-North Lake Tahoe			
Products	Placer Valley	Gold Country	High Country-North Lake Tahoe
Outdoor Recreation	Alternative day and extended trip travel to outdoor recreation areas in Gold Country and North Lake Tahoe for outdoor enthusiasts visiting The Valley.	Alternative day and extended trip travel to outdoor recreation areas in North Lake Tahoe and The Valley for outdoor enthusiasts visiting Gold Country.	Alternative day and extended trip travel to outdoor recreation areas in Gold Country for outdoor enthusiasts visiting North Lake Tahoe.
Touring Wineries	Alternative day trip for meetings, sports events, and gaming visitors to Gold Country wineries.	Cooperative marketing with adjacent foothill wine regions.	Alternative tours down Interstate 80 to Gold Country for out-of-state visitors looking for an out of area trip.
Heritage Tours	Heritage Trail from Placer Valley to Gold Country onto High Country-North Lake Tahoe	Heritage Trail to Placer Valley or up to High Country-North Lake Tahoe facilities.	Heritage Trail down to Gold Country and Placer Valley.
Agri-Tours	Day travel to Gold Country agri-tours; Farmers Markets; Placer Grown produce in restaurants and markets.	Farmers Markets; Placer Grown in restaurants and markets.	Alternative tours down Interstate 80 to Gold Country for out-of-state visitors looking for an out of area trip.
Cycling	To lower foothills and Gold Country road cycling routes.	To High Country for destination off-road and road cyclists seeking mountain riding	To Gold Country for destination mountain oriented cyclists seeking alternative terrain.

Linkages: Placer Valley – Gold Country – High Country-North Lake Tahoe (cont)

Products	Placer Valley	Gold Country	High Country-North Lake Tahoe
Shopping	Day travel to specialty and boutique shopping in Gold Country and North Lake Tahoe.	Day travel to The Valley shopping district. Day travel to specialty and boutique shopping in North Lake Tahoe.	Day travel to The Valley shopping district. Day travel to specialty and boutique in Gold Country.
Arts	Shared events calendar; gallery lists.	Shared events calendar; gallery lists.	Shared events calendar; gallery lists.
Adjacent regions	Golf and shopping outings for meeting and conventions in Sacramento.	Gold country tours along Highway 49 and to California State Historic Parks. Gold Country tours and day trips for meetings and conventions in Sacramento.	Cooperative marketing efforts with South Lake Tahoe tourism organizations. Travel to Lake Tahoe for meetings and conventions in Reno.

APPENDIX A

Outbound and Inbound Travel by Placer Valley Residents, 2006-07

	2006	2007
Tourism Goods and Services Direct Output (millions)	\$706,786	\$746,541
International Total	\$86,000	\$97,000
Domestic	\$620,786	\$649,541
Residents	\$391,095	\$409,211
Business & Government	\$229,691	\$240,330
<i>Source: U.S. Bureau of Economic Analysis</i>		
Number of U.S. Households	111,617,402	112,377,977
Median Income	\$48,451	\$50,740
<i>Source: U.S. Census</i>		
Travel Spending per Resident Household	\$3,504	\$3,641
Households in Roseville, Rocklin, Lincoln area	79,278	84,917
Estimated Median Income	\$71,500	\$74,878
(Pct over national)	148%	148%
Outbound U.S. travel spending by residents of Roseville, Rocklin, and Lincoln (millions)	\$410	\$456
Inbound travel spending for The Valley	\$228	\$231
Additional inbound spending necessary for balance	\$182	\$225

Source: Dean Runyan Associates from U.S. Census data

APPENDIX B
Public Event and Attractions

Public attractions and events in Placer County attract a significant number of people each year. Large numbers attend the many events held in the area, summarized in Table B-1. Some public events are held each year attract visitors from outside of the local market area. Other public events attract mostly local residents.

Table B-1
Primary Placer County Public Events

Name	Attendance	Year Started
Auburn Air Fair	2,500-3,000	1980
Auburn's "Festival of Lights" Parade	13-15,000	circa 1998
Black and White Ball	6,000	1992
Cinco de Mayo Festivities in Auburn	500	1990
Eggplant Festival	11-14,000	1988
"Feats of Clay" Art Festival	4,325	1987
Foresthill's Heritage Festival	3-3,500	circa 1998
Gold Country Fair	45-50,000	1889
Lake Tahoe's Outdoor Summer Music Festival	1,600	1983
Lincoln's Portuguese Holy Ghost Celebration	3-5,000	1923
Loomis Cowpoke Poetry	1,200	1995
Mountain Mandarin Festival	40,000	1993
NASCAR Camping World Series	9,000	2008
New Year's Eve Torch Parade at Squaw Valley	3,000	circa 1998
Old Auburn's Street Fairs:		
Old Town Auburn Antiques Street Fair	4-5,000	1967
Country Christmas	14-20,000	1982
Family Night Out	5-5,000	1999
Placer County Fair	40,000	1937
Placer Valley Wine and Art Festival	2,500	2008
Roseville's Denio's Market and Auction (each weekend)	10-30,000	1947
Snowfest Winter Festival	25-30,000	1982
Strawberry Festival	60,000	1989
The Auburn Symphony	3,400	1988
Thrive Conference, Bayside Church	2,500	2004
participatory tournament and championship events	35-42,000	various

Source: Dean Runyan Associates

APPENDIX C
Placer County Tourism Assessment Interviews
By Organization

- Sierra Gateway Business Association
- Placer County Wine and Grape Association
- Auburn Downtown Merchants Association
- Placer County Agriculture Commission
- Auburn Holiday Inn/PCVB Board of Directors
- Placer County Museums
- Placer County Agricultural Marketing
- U.S. Forest Service/PCVB Board of Directors
- Auburn Chamber of Commerce
- The Ridge Golf Club
- Placer Arts – The Arts Council of Placer County
- Rocklin Chamber of Commerce
- Rocklin City Council/Placer County Economic Development Board
- City of Roseville, Department of Economic Development
- Korba Properties/Restaurant Owners Operators
- Westfield Galleria at Roseville
- Thunder Valley Casino
- Tahoe City Public Utility District
- Squaw Valley Resort
- Resort at Squaw Creek
- East-West Partners
- North Star Resort
- Placer County Visitors Bureau CEO
- Placer Valley Tourism CEO
- North Lake Tahoe Resort Association CEO