

Phase 1 Draft: Released March 3, 2025
Industry comment period ends: March 31, 2025
Submit comments to regionalplans@visitcalifornia.com



Regional strategic tourism plan

High Sierra



March 2025

The development of these regional plans was funded by a State Tourism Grant awarded to Visit California as part of the U.S. Economic Development Administration's Travel, Tourism and Outdoor Recreation program. The program invested federal funds appropriated by the American Rescue Plan Act to support states and communities whose tourism economy was damaged by the COVID-19 pandemic.

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

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



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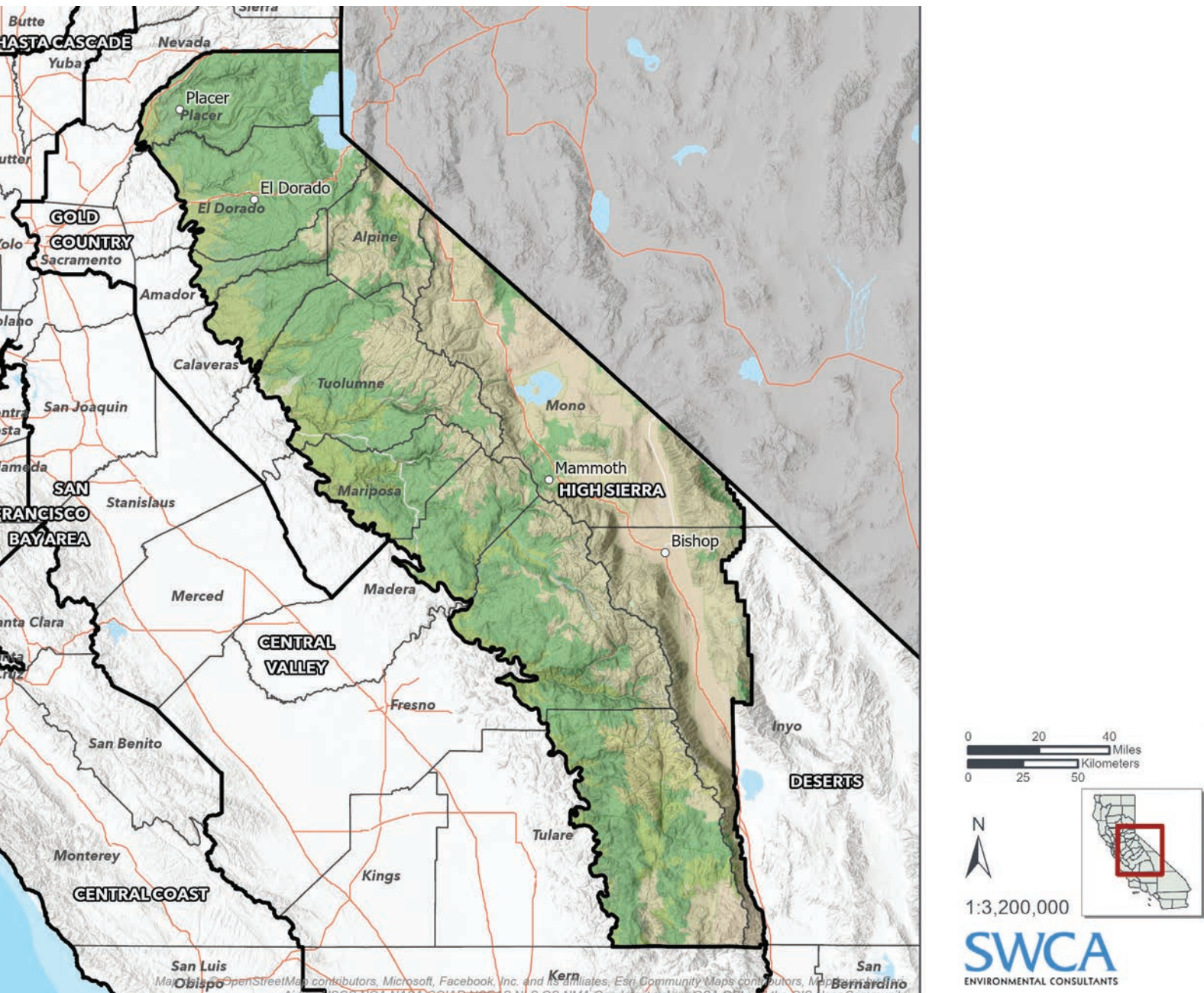
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Executive summary

The High Sierra region of California, spanning 25,000 square miles and encompassing iconic areas like Yosemite National Park, Lake Tahoe, Mammoth Lakes, and Truckee, is renowned for its stunning natural beauty and outdoor recreation opportunities. In 2023, the region’s travel industry demonstrated strong growth, with total travel spending reaching \$8.7 billion, a 10.1% increase from the previous year.



To develop a comprehensive tourism strategy, Jones Lang LaSalle (JLL) and Visit California undertook an extensive two-year planning process involving multiple stakeholder engagement methods and in-depth market research. This process included regional advisory committee meetings, tourism stakeholder surveys with over 106 participants, 10 focus groups with nearly 150 total participants, individual interviews with 50-plus key industry stakeholders, and site visits to 50-plus points of interest.

The research process utilized several proprietary tools and methodologies:

The tourism readiness [index](#), developed in collaboration with the World Travel & Tourism Council, analyzed nearly 4,000 data points across 68 indicators. Results showed the High Sierra region surpasses state averages in four out of eight the [index pillars](#), particularly in concentration, urban readiness, safety and security and environmental readiness. The region is classified as an “emerging performer,” indicating growing tourism development with needed infrastructure and strong seasonal performance.

The [demand driver dcorecard](#) evaluated 359 attractions and experiences. 17% of scored assets generate regional or national demand, with 34 attractions identified as national or worldwide demand drivers. 87% of assets are family-friendly, and 61% are classified as outdoor recreation.

[The event matrix](#) process assessed 129 events, identifying 66 unique events positioned to drive national and regional demand.



Bass Lake

Based on these findings and stakeholder input, five strategic priorities were identified for the High Sierra region:

- 1** Invest in tourism product development: enhance outdoor recreation infrastructure, diversify offerings with cultural and non outdoor activities, and develop new lodging options, including alternative accommodations.
- 2** Develop events and festivals strategy: focus on shoulder and off-season periods, leverage private and public sector investments in events, use an **event matrix** for strategic development.
- 3** Promote shoulder and off-season visitation: leverage marketing resources to drive visitation into off-peak periods to impact stakeholder businesses during the times of year when demand slows. Additionally, shoulder and off-season visitation will have a more sustainable growth impact on the destination.
- 4** Support workforce development: utilize existing apprenticeship programs, create a shared employment pool platform and partner with job training centers and education systems.
- 5** Promote community engagement and enhance messaging: Resident and community engagement is an important factor in future tourism balance. Visit California's Consumer Sentiment Study work showed strong positive understanding of tourism for the High Sierra region; however, residents feel traffic, congestion and cost of living challenges can cause pushback. Continuing to find ways for two-way conversation with the community will be important, including developing messaging and campaigns directed at a residential audience when appropriate.



Convict Lake

These strategies aim to address the unique challenges of the High Sierra region, including its vast geography, seasonal access issues and the need to balance tourism growth with environmental preservation. Implementation will require ongoing collaboration among local stakeholders, destination marketing organizations, businesses and community organizations.

In conclusion, the High Sierra’s tourism potential is significant, especially with its diverse natural attractions and outdoor recreation opportunities. The strategic plan emphasizes the importance of balancing tourism growth with community needs, infrastructure development and environmental preservation. By addressing key challenges and leveraging its strengths, the region can enhance its appeal as a year-round destination while ensuring sustainable development and preserving its iconic landscapes.

JLL and Visit California extend their gratitude to the High Sierra Regional Advisory Committee members for their invaluable contributions throughout this process. Their continued involvement will be essential in supporting the implementation of these strategic recommendations and ensuring the long-term success of tourism in the High Sierra region. [Please refer to the committee participants in the Appendix.](#)



Desolation Hotel

Regional research and discovery

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



Heavenly Village

The regional research and discovery section includes vast research which has been detailed further and organized under the following categories for the High Sierra region:

JLL-Conducted research components:

- 1 State of the region Overview:** The overview provides a brief introductory summary of what currently impacts the tourism industry in the High Sierra region.
- 2 Destination plans review database: data-gathering process** that included 15 individual plans inventoried; elements include addressing housing; employment; guiding development and preserving rural downtowns; expanding, managing and maintaining outdoor recreation and trails, providing access to natural resources; protecting natural resources; and improving transportation networks.
- 3 Stakeholder engagement:** This section incorporates feedback from multiple different methods outlined here:
 - Regional advisory committees: meetings held monthly for approximately 24 consecutive months with a committee consisting of 20-plus members. Please refer to the [Appendix](#) for a full list of members.
 - Tourism stakeholder survey: over 106 participants representing a diverse range of individuals and organizations involved in the tourism sector. The feedback summary highlights perspectives on strengths, weaknesses and growth opportunities.
 - Focus group feedback: In a small group environment, 10 in-depth discussions with stakeholders from 10 different sectors, including hotels and lodging, land management, outdoor recreation, economic development, resilience and sustainability, tourism and visitor experience, infrastructure, and transportation. Through these discussions, valuable insights were gathered on specific areas of interest and growth potential.
 - Individual interviews feedback: over 50 key industry stakeholders were interviewed, offering a deeper understanding of perspectives and addressing any specific questions or concerns.
 - Site visits: visited 50-plus points of interest throughout the High Sierra region across three weeks, providing valuable insights and observations.
- 4 [Tourism readiness index](#):** detailed data analysis process that used nearly 4,000 data points to assess the readiness and capacity of the tourism industry in the High Sierra region
- 5 [Demand driver scorecard](#):** evaluation that identified the key assets and experiences driving visitor demand in the region.
- 6 [Event matrix](#):** evaluation that identified key events driving visitor demand in the region.
- 7 Destination sustainability plans:** data-gathering process that included 12 individual plans inventoried. Elements addressed include housing; employment; guiding development; preserving existing neighborhoods; protecting the environment; improving pedestrian experience and walkability; reducing commuting out of the city; promoting larger open spaces in specific areas; and ensuring a multimodal, sustainable city, and much more.

Visit California Provided Research, JLL Reviewed Components:

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

A comprehensive research approach allowed for the development of a clear vision and strategy for the High Sierra region's tourism industry, with foundational recommendations rooted in data, insights and stakeholder feedback.

State of the region

The High Sierra region, comprising the breathtaking vistas of the High Sierra from Mammoth Lakes to the Lake Tahoe Basin, Truckee and Yosemite National Park, stands as a testament to awe-inspiring natural beauty, outdoor adventure and serene landscapes.

Known for its dramatic elevation changes, pristine wilderness and iconic landmarks, the High Sierra region attracts nature enthusiasts, adventure seekers and serenity seekers from across the globe. The High Sierra region includes seven counties and is home to eight destination management organizations and tourism departments.

In 2023, the High Sierra region witnessed a striking resurgence in its travel and tourism industry, with total travel spending soaring to \$8.7 billion, reflecting a robust 10.1% growth from the prior year. Visitor spending alone contributed \$5.9 billion, while additional travel-related expenditures added \$2.8 billion. This notable growth emphasizes the region’s allure and its successful rebound in the postpandemic era. (The Economic Impact of Travel, Dean Runyan Associates, 2023)

The High Sierra region is celebrated for its majestic mountain ranges, crystal clear lakes, and immersive outdoor activities. From the bustling, adventure-packed Mammoth Lakes with its skiing and mountain biking trails to Lake Tahoe’s sparkling waters offering boating, fishing and water sports in the summer and skiing and riding in the winter, the region presents a veritable playground for outdoor enthusiasts. Notable for its towering peaks and lush valleys, Yosemite National Park stands as a crown jewel of the region. It drew over 3.9 million visitors in 2023 with its stunning waterfalls, giant sequoias and vast wilderness areas.

According to Visit California’s Community Sentiment Study, the High Sierra region is beloved for its outdoor recreational offerings (92%), scenic beauty (89%), and peaceful retreat opportunities (84%). Popular attractions include the slopes of Mammoth Mountain, the tranquil shores of Lake Tahoe, the historic charm of Truckee, the iconic vistas of Half Dome and El Capitan in Yosemite and the gateway communities rich with history, heritage and outdoor recreation of their own. Residents and visitors alike revel in these natural wonders, yet there are both real and perceived issues, such as seasonal overcrowding (37%) and accessibility issues during winter months (24%). (Visit California Community Sentiment Study, 2023)

The communities within the High Sierra region are characterized by a deep connection to nature and lifestyles that celebrates outdoor living and space to get away from city crowds for unique experiences only to have a unique experience only available in California’s High Sierra region. From the rustic charm of communities like Mariposa, Lee Vining and Bishop to vibrant mountain towns like South Lake Tahoe and Truckee, with their historic downtowns and vibrant local culture, to the high altitude living in Mammoth Lakes, visitors are welcomed into a regional tapestry that blends adventure, relaxation and cultural richness. Local makers, brewers and guides often highlight the character of the region, and events like the Lake Tahoe Shakespeare Festival add to the region’s distinctive appeal.

In conclusion, the High Sierra region, with its combination of striking natural landscapes, myriad outdoor activities and rich cultural experiences, remains a top destination for visitors seeking both adventure and tranquility. Its thriving tourism sector, natural wonders and cohesive communities ensure that the High Sierra will continue to captivate and inspire visitors from all corners of the globe.



Heavenly Ski Resort

Destination plans review database

The Regional Strategic Tourism Strategic Planning process was designed to examine issues from a regional perspective, building upon the valuable work already completed in destination-specific plans by DMOs, convention and visitor bureaus and municipalities. This approach ensures that existing efforts are leveraged and enhanced rather than duplicated.

The comprehensive review encompassed 500 plans across California, with 8 plans specifically focused on the High Sierra region. A full list of the reviewed plans can be found in the [Appendix](#).

Upon analysis of the High Sierra region plans, several key themes were identified that align with the priorities highlighted in the present plan:

1 Outdoor recreation, land management and trail access

- Management, maintenance and continued access to trails
- Connectivity between towns, trails and outdoor recreation
- Land manager coordination
- Sustainable use and conservation efforts

2 Economic development and vitality

- Business attraction and retention
- Job creation and workforce development
- Tourism promotion

3 Environmental sustainability and Climate action

- Climate change adaptation and mitigation
- Protection of natural resources
- Emergency preparedness

4 Transportation and mobility

- Multimodal transportation options
- Pedestrian and bicycle infrastructure
- Public transit network investments and improvements
- Traffic management and congestion reduction

5 Housing and land use

- Affordable housing efforts
- Land management efforts on publicly owned property for housing needs

6 Community health and quality of life

- Parks and open space expansion
- Recreation opportunities
- Arts and cultural development
- Seasonal traffic and congestion mitigation
- Roadway improvements

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

Stakeholder engagement

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

Regional advisory committees

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

Tourism stakeholder survey

Questions from the survey capture a variety of topics including travel preferences, satisfaction levels with accommodations, transportation, attractions, etc., suggestions for improvement, and more. The tourism survey was conducted anonymously to encourage feedback and diverse perspectives from various sectors across the region while asking overall demographics and industry profile questions to shed light on the represented stakeholder groups. The tourism survey garnered 106 survey responses from across the High Sierra region.

Focus groups

Focus groups were conducted to discuss key themes and gather qualitative data. 10 focus groups were conducted with nearly 150 total participants, including destination management/marketing organizations; lodging; restaurants and retail; entertainment; culture and heritage; economic development; land management; conservation; workforce development; resilience and sustainability; transportation and infrastructure; meetings and events; diversity, equity and inclusion and more.

Individual interviews

Individual meetings were held with stakeholders to collect detailed feedback. The stakeholders included industry leadership and management, supporters and individuals concerned with tourism's potential challenges and impacts on the High Sierra region. The interview process encompassed 50 individual interviews, including all members of the regional advisory committee.

Site visits

Multiple visits were conducted to the High Sierra region to immerse further in the local environment, engage directly with stakeholders, visit tourism sites and attractions, and witness firsthand the dynamics of the tourism industry in the High Sierra region. Over 50-plus points of interest were visited throughout the High Sierra region across two separate visits.

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

Key themes from stakeholder engagement

The various methods of stakeholder feedback reflected several major themes within the High Sierra region:

- Maintenance of trails and access to outdoor recreation was a top priority. Ensuring access during maintenance requires planning and investment.
- Ongoing collaboration and communication needed with land managers across the region. Most land is managed by a state or federal agency, making access, maintenance and communication challenging across the industry and for the public. Organizations like the Eastern Sierra Sustainable Recreation Partnership are actively working toward fostering improved communication with their respective agencies and governmental entities, but the issue persists regionwide.
- Seasonal nature of workforce makes consistency in service as well as developing workforce challenging.
- Lack of internet access, cell service and related communications infrastructure creates challenges for navigation within the region and causes safety concerns as more visitors come to the area and take part in outdoor recreation.
- Meetings and events were surfaced as an area of opportunity to impact seasonality with a new facility coming online in South Lake Tahoe.
- Risks of overtourism both real and perceived. Resident frustration with traffic, congestion and visitor behavior has caused tension and created media interest.
- Peak seasons are summer and winter seasons with the shoulder seasons occurring in the fall and spring. There has been recognition and effort to disperse visitation into the shoulders to avoid overtourism concerns.
- Sustainable tourism practices continue to gain importance. Several organizations including ESSRP, Whitebark Institute, Sierra Nevada Conservancy, Keep Tahoe Blue, TRPA, and DMOs like Visit Truckee Tahoe and others have dedicated stewardship and sustainability plans. Many organizations are working toward increasing sustainable tourism and recreation practices.
- Despite challenges like infrastructure and management of natural resources, overall support for tourism and understanding of its value to the local economies within the region appears strong.
- During peak seasons, entertainment experiences and beaches are popular destinations for travelers, resulting in increased demands and pressure on these assets.
- Natural assets, such as beaches, mountain areas and parks, are delicate ecosystems that require special care to avoid damage and ensure their long-term sustainability.

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

Tourism readiness index

Overview

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

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

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

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

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

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



The High Sierra results

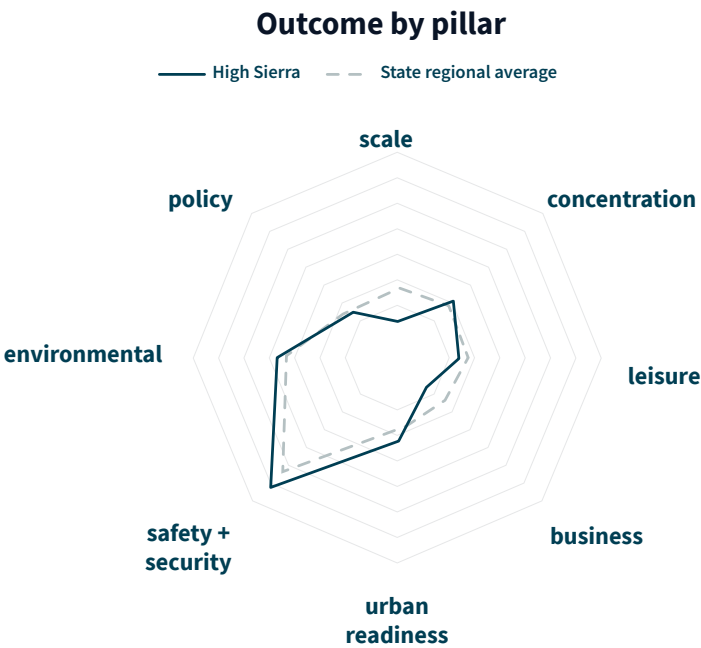
The **tourism readiness index** reveals that the High Sierra region is above state averages in four out of eight pillars, showcasing strong performance. Notably, the High Sierra region stands out when compared to other regions in terms of the concentration, urban readiness, safety and security and environment. However, it falls slightly behind in the scale, leisure, business and policy categories.

In-depth analysis of data from reputable global databases such as Centre for Aviation, CoStar, Oxford Economics, TripAdvisor, and more sheds light on the factors contributing to the High Sierra region’s strong readiness performance. For instance, the analyzed data highlights the positive impact of factors like safety scores, air quality, carbon emissions, high quality of leisure assets and attractions, and the overall geography that enables visitation across a wide variety of locations across the region when compared to other regions.

Conversely, certain data points contribute to the underperformance in areas such as lodging inventory, workforce availability, cost of living, and visitor-to-resident ratios. These insights provide opportunities for targeted improvements to enhance the High Sierra region’s overall tourism readiness and maintain its competitive edge.

Based on the results, the High Sierra region is classified as an “emerging performer”. This typology represents a growing region/destination with continued room for growth, but it needs to consider management to avoid pressures and find balance. The unique aspect of the High Sierra Region is its highly seasonal nature. While it scored as an emerging performer, the region experiences pressures more closely experienced by mature performers or managing momentum regions that are more well established and are dealing with destination management issues like overcrowding, capacity building and infrastructure challenges. This dichotomy in seasonal pressures was reinforced by stakeholder input and will be an important consideration in the recommendations of this report.

Ongoing strategic planning, including regional research and discovery and targeting new visitor segments, will enable the High Sierra region to maximize the utilization of its existing assets while identifying new growth opportunities. Finally, sustainable development practices should be prioritized to protect the environment, preserve culture and support local communities, reinforcing the High Sierra region’s position as a premier global tourism destination. JLL has reviewed 12 individual municipal and DMO plans within the region that address challenges and solutions related to guiding the future development, preservation and improvement of cities by addressing various aspects of land use, infrastructure, public services, environment, housing, and economic development.



Demand driver scorecard

Overview

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

This scoring process was based on an evaluation which includes:

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

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



Mammoth Mountain



Yosemite National Park



Blue Granite Climbing Gym

High Sierra results

The High Sierra region [demand driver scorecard](#) process assessed 359 attractions and experiences across the region, which were identified by regional advisory committee members, desktop research and JLL during site visits. The scoring and analysis is a representative analysis intended to highlight the significant inventory and diversity of assets in the High Sierra region.

The results reveal that 17% of the scored assets are generating regional or national demand. Notably, 34 attractions and experiences are identified as national or worldwide demand drivers, including popular destinations such as Yosemite National Park, Northstar California, and Pope Beach. Additionally, there are 33 assets and experiences categorized as regional demand drivers, with examples like The Loft Theatre, Tahoe Treetop Adventure Parks, Historic Downtown Truckee, and the Sierra National Forest.

According to the analysis, 87% of assets scored in the region are considered family-friendly, with over 54 of these assets driving regional and national demand. Notable examples of family-friendly attractions include Yosemite National Park, Heavenly Mountain Resort, Pope Beach, among others. The abundance of family-friendly attractions in the region highlights the importance of catering to the needs and preferences of family travelers.

Furthermore, approximately 61% of the assets scored are classified as outdoor recreation, of which 23% are considered attractors for the region. The outdoor recreational areas encompass popular destinations such as Kings Beach State Recreation Area, Mammoth Mountain Ski Area, among others. It is essential to underscore the significance of preserving and maintaining the natural assets within the region. Natural resources, such as beaches, parks and mountains, not only enhance the quality of life for residents but also play a vital role in attracting visitors and driving tourism.

As a third and final example, 6% of all assets are related to culture heritage, and history, of which 14% or three assets are classified as attractors. These assets include Historic Downtown Truckee, Vikingsholm and Tallac Historic Site, among others.

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

The [demand driver scorecard](#) analysis findings have supported the identification of key priorities and the formulation of recommendations to continue positioning the High Sierra region for sustainable success.

Event matrix

Overview

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

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

The [event matrix](#) process included:

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

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



Bluesapalooza

High Sierra results

The High Sierra region **event matrix** process inventoried and scored over 129 events across the region that were collaboratively identified by the regional advisory committee, observed during visits to the region, noted as high priority in stakeholder surveys, and validated as significant current and future room night generators during stakeholder discussions. Similar to the variety of demand drivers in the High Sierra, the region hosts an array of annual events across the region and throughout the year.

The outcomes from this analysis identified 66 unique events that are positioned to drive national and regional demand to the High Sierra region, including the American Alpine Club Craggin’ Classic Climbing Festival, the Sugar Bowl Uphiller, the Iron Man, the Lone Pine Film Festival, the Annual Mariposa Powwow Spring Celebration, and many others. The high-impact events drive extensive leisure tourism, reinforce the positive nature of the High Sierra region brand and enhance the destination’s visibility.

Hoteliers, retailers, creative economy representatives, and other regional representatives reinforced the significant annual economic impacts of these events. The High Sierra region events also exhibit limited seasonality, meaning events attract visitors consistently throughout the year.

Several additional events were analyzed, such as the Mammoth Film Festival, Lake Tahoe Mountain Bike Race, Truckee Earth Day Festival and the Donner Summit, among others. While these events attract some visitors, overall scores indicate these events are primarily local in nature and contribute relatively less overnight visitation and economic impact as compared to other annual events in the region.

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

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



Lake Tahoe

Key themes from the research process

- Widespread stakeholder engagement played a crucial role in developing the regional strategic plan, with input gathered through various methods such as interviews, surveys and focus groups.
- Key themes that emerged from the engagement process include the recognition that continuously improving the regional visitor and attendee experience is crucial for the success of the region. Outdoor recreation was the primary leisure segment identified as playing a vital role in driving economic growth and sustaining a thriving visitor economy. The opportunity to protect and ensure access to outdoor recreation was a key focus. Additional opportunities to diversify the tourism ecosystem in the region should be explored. The themes will be further explored in the recommendations section of this plan.
- JLL's **tourism readiness index** classifies the High Sierra region as an “emerging performer” with growing tourism development and strong seasonal performance.
- As an emerging performer, the High Sierra region should prioritize visitor management by enhancing visitor experiences, proactively managing pressures and engaging in sustainable capacity building.
- The High Sierra region **demand driver scorecard** process assessed 359 attractions and experiences across the region. An investment prioritization approach based on the results of the scorecard should be put into motion during the first year of implementation.
- The **demand driver scorecard** results highlight the significant inventory and diversity of attractions and experiences in the High Sierra region, with 17% of scored assets generating regional or national demand.
- The High Sierra region **event matrix** process inventoried and scored 129 events across the region. It indicated the events that should be focused on going forward.
- The event matrix analysis identified 66 unique events in the High Sierra region that are positioned to drive national and regional demand, attracting visitors consistently throughout the year.

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



Sequoia National Park



Yosemite

The Economic Impact of Travel

(Dean Runyan Associates, 2023)

This report provides a comprehensive analysis of the economic effects of travel on California’s state economy, focusing specifically on key metrics such as travel spending, earnings, employment, and tax receipts. The information is broken down by county and tourism regions, with data based on estimates and research conducted by Dean Runyan Associates for Visit California.

In summary, in 2023, the High Sierra region achieved a significant milestone in its travel industry, with total travel spending reaching \$3.7 billion, marking a substantial 2.3% growth from the previous year. Visitor spending accounted for \$3.6 billion, while additional travel-related expenditures added \$100 million. This upward trend highlights the region’s strong recovery and robust growth postpandemic, emphasizing its allure and resilience as a travel destination.

The economic contributions of travel in the High Sierra region were profound. Employment within the travel industry surged by 3.4%, providing over 39,000 jobs. Direct travel-generated earnings increased by 8.2% to \$1.1 billion, with key sectors such as accommodations, food services and outdoor recreational activities showing substantial growth.

Such economic impact underscores the significance of the travel and tourism industry as a pillar of the High Sierra region’s economy. The growth in travel spending, job creation, and tax revenue demonstrates the indispensable role that tourism plays in fostering economic development. This positive trend not only aids in the region’s economic recovery but also aids in sustaining the diverse offerings that make the High Sierra a premier destination.

As the High Sierra region continues to leverage its natural beauty, outdoor recreational opportunities and unique cultural offerings, the travel industry’s contributions will likely remain a key driver of economic health and community well-being. The ongoing investment in infrastructure and public services funded by travel-generated revenues reinforces the region’s commitment to maintaining a high quality of life for residents and an exceptional experience for visitors.



Sequoia National Park

Visit California Community Sentiment Study
(Future Partners, 2023)

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

Key findings for the High Sierra region indicate that residents highly value local natural features and amenities such as outdoor recreational activities (92%), scenic beauty (89%), and peaceful retreat environments (84%). Popular tourist attractions include renowned spots like Yosemite National Park, Lake Tahoe, Mammoth Lakes, and Truckee. While residents appreciate these assets, they also express concerns about seasonal overcrowding (37%) and accessibility issues during winter months (24%).

Residents reportedly see tourism as a net positive, improving local business opportunities and creating jobs. Over half of the residents agree that tourism’s benefits outweigh its problems both locally (51%) and regionally (54%). Tourism is deemed crucial for the regional economy, with 68% of locals recognizing its importance for their community and 75% for the broader region. Additionally, around 42% feel that their quality of life is enhanced by tourism, indicating potential areas for strategic improvements.

The dual impact of tourism is evident in the High Sierra region. Residents acknowledge significant business opportunities, job creation and the support that tourism provides to the hospitality sector. However, prevalent issues such as traffic congestion (33%), crowding at popular attractions (29%), and environmental concerns (28%) also stand out. These challenges reflect the balancing act between harnessing tourism’s economic benefits and managing its strains on local infrastructure and natural resources.

Strategically, the High Sierra region might focus on balancing tourism’s economic benefits with quality-of-life improvements. Addressing traffic congestion, overcrowding and environmental preservation through enhanced infrastructure and sustainable policy initiatives could bolster tourism’s positive perception. Distributing visitor pressure more evenly by promoting lesser-known local attractions can also mitigate stress on the most popular sites. A targeted campaign highlighting the symbiotic relationship between tourism and community well-being might foster resident support and minimize resistance.

By strategically managing tourism to maximize its benefits while mitigating its challenges, the High Sierra region can ensure that it remains a thriving destination that supports both the economy and the quality of life of its residents. Continued investment in sustainable tourism practices and community engagement can further enhance the region’s appeal and resilience.

High Sierra regional opportunities

The High Sierra regional opportunities present a comprehensive set of priorities and strategies to enhance the region's tourism industry while addressing its unique challenges. These strategies have been formulated based on extensive research, stakeholder engagement and analysis of the High Sierra's distinctive attributes and opportunities.

The priorities focus on several key areas, including tourism product development emphasizing outdoor recreation and new development, events and festivals strategy, improvement of tourism-related infrastructure, and workforce development. Each priority area is accompanied by strategies designed to capitalize on the High Sierra's natural assets, address existing challenges and position the region as a premier year-round destination for diverse visitors.

The opportunities aim to balance tourism growth with environmental preservation and community needs, recognizing the region's "emerging performer" classification with strong seasonal performance, which pushes it into a "mature performer" during peak times. Strategies include enhancing outdoor recreation infrastructure, diversifying tourism offerings, optimizing event scheduling, improving regional connectivity and transportation, and developing a robust workforce pipeline.

These priorities and strategies provide a road map for stakeholders, DMOs and partners across the High Sierra region to collaborate and implement in the coming years. The goal is to create a more resilient, diverse and sustainable tourism ecosystem that benefits visitors and local communities while preserving the iconic landscapes and natural beauty of the High Sierra region.

1 Invest in tourism product development

Outdoor recreation

The High Sierra region is a paradise for outdoor enthusiasts, offering a diverse range of natural wonders and adventure opportunities. According to the [demand driver scorecard](#), approximately 61% of the 359 assessed assets in the region are classified as outdoor recreation. Notably, 23% of these outdoor recreational assets are considered attractors, underscoring their significant role in drawing visitors to the area.

Key outdoor attractions include world-renowned locations such as Yosemite National Park, Mammoth Mountain Ski Area and Lake Tahoe. These destinations not only showcase the region's breathtaking landscapes but also serve as powerful drivers of tourism demand throughout the year.

The region's appeal extends beyond its natural beauty, with an impressive 87% of scored assets considered family-friendly. This unique combination of outdoor recreation and family-oriented attractions positions the High Sierra as an ideal destination for a wide range of visitor groups, from adventure seekers to families looking for memorable experiences.

As the High Sierra looks to the future, balancing tourism growth with sustainable practices will be crucial. The preservation and strategic enhancement of these natural assets, along with improved access and maintenance of trails, will play a vital role in maintaining the region's competitive edge in the tourism industry while ensuring the long-term health of its ecosystems.

The Sierra Nevada Conservancy's Governing Board funded ESSRP's Sustainable Recreation and Tourism Initiative, a project to benefit the conservancy's eastern subregion, including Inyo, Mono and Alpine counties. One of the outcomes of this initial funding was the development of the SRTI Portfolio of Projects, a diversified collection of eight projects identified through a collaborative approach. The Portfolio of Projects represents a regional sustainable recreation strategy.

By leveraging its outdoor recreational offerings alongside its cultural and historical attractions, the High Sierra can continue to attract diverse visitors, boost its local economy and solidify its position as a premier destination for nature-based tourism. The region's commitment to sustainable tourism practices and collaboration with land managers will be key to ensuring the continued success and preservation of its outdoor recreation assets.

Key partners

Visit Tahoe-Truckee, Visit Lake Tahoe, North Lake Tahoe Community Alliance, Mammoth Lakes Tourism, Eastern Sierra Sustainable Recreation Partnership, Mammoth Lakes Trails & Public Access Foundation, Yosemite National Park, Yosemite Mariposa County, Visit Yosemite Madera County, Tahoe Backcountry Alliance, Mammoth Mountain, Heavenly Resorts, Palisades Tahoe, Vail Resorts, U.S. Forest Service, Tahoe Regional Planning Authority.

Strategies

- Pursue state and federal grants for trail management and maintenance. Support partner organizations including the National Park Service, regional county governments, U.S. Forest Service, Tahoe Regional Planning Authority, and regional nonprofits like ESSRP, MLTPA, Tahoe Backcountry Alliance, and many more.
- Pursue state and federal grants to support ESSRP's [Sustainable Recreation & Tourism Initiative Portfolio of Projects](#) and the Eastern Sierra portion of CA Jobs First Outdoor recreation initiatives.
- Advance the Lake Tahoe Stewardship Council's implementation efforts to engage with residents and address decisions about outdoor recreation access, balance and carrying capacity.
- Develop new and additional outdoor recreation inventory to drive demand during nonpeak season.



Lake Tahoe

New tourism product development

The High Sierra region has shown strong tourism growth with total travel spending reaching \$8.7 billion in 2023, a 10.1% increase from the previous year. However, the [tourism readiness index](#) classifies the region as an emerging performer, indicating room for strategic and managed growth, particularly during seasonal peak periods.

The [demand driver scorecard](#) revealed that while 61% of assessed assets are classified as outdoor recreation, there's potential to diversify and strengthen other sectors.

These strategies build upon the region's existing strengths while addressing identified gaps and opportunities. They create a more resilient and diverse tourism economy, improve visitor experiences and support sustainable growth in the High Sierra region. By implementing these strategies, the region can enhance its position as a premier destination, attract a wider range of visitors and create year-round economic benefits for local communities.

Key partners

Visit Tahoe-Truckee, Visit Lake Tahoe, North Lake Tahoe Community Alliance, Mammoth Lakes Tourism, Eastern Sierra Sustainable Recreation Partnership, Yosemite National Park, Yosemite Mariposa County, Visit Yosemite Madera County, Tahoe Regional Planning Authority

Strategies

- Elevate and invest in cultural tourism offerings such as history, culture and heritage.
- Refine target businesses for expansion and relocation based on data resourced during this process.
 - In total, as the Claritas Retail Supply & Demand Power Report reports, retail including food and beverage has a \$330M opportunity gap (demand) across the region.
 - More specifically, this shows the following business types have unmet annual demand:
 - Beer, wine and liquor stores: \$10 million
 - Clothing and accessories: \$33 million
 - General merchandise, grocery and big box retail: \$119 million
 - Catering and restaurants: \$23 million
- Develop new lodging options to support demand and expand into more rural areas with new offerings to disperse incremental visitation.
 - Prioritize locations for new lodging based on existing destination pressures.
 - Explore development of wellness and upper upscale lodging products.
 - Develop alternative accommodations, including glamping and “tiny home” accommodations, to attract interest from more price-conscious demographics as well as fill a need for lodging with a smaller footprint for development.



Mammoth Lakes

Events and festivals

The High Sierra region boasts a diverse and impactful events landscape, as revealed by the comprehensive [event matrix](#) process. Over 129 events were inventoried and scored across the region, with 66 unique events identified as drivers of national and regional demand. These high-impact events not only drive extensive leisure tourism but also reinforce the positive brand image of the High Sierra region.

While the region’s events exhibit limited seasonality, attracting visitors consistently throughout the year, there is a strategic opportunity to further develop and enhance events during shoulder and off-season periods. This approach aims to mitigate concerns about overtourism during peak seasons and support a more sustainable, year-round tourism model.

Key partners

Visit Tahoe-Truckee, Visit Lake Tahoe, North Lake Tahoe Community Alliance, Mammoth Lakes Tourism, Eastern Sierra Sustainable Recreation Partnership, Yosemite National Park, Yosemite Mariposa County, Visit Yosemite Madera County, Palisades Tahoe, Vail Resorts, Mammoth Mountain Ski Area

Strategies

- Work with local businesses to partner and offer extended stay experiences for event periods to increase length of stay and overall impact.
 - [Palisades Tahoe](#) has invested in a shoulder and off-season event campaign to attract visitors to the Tahoe Basin. This includes wine and culinary experiences, music festivals and performances by top-tier talent, such as Ludacris, Pepper, and Dillon Francis.
- Pursue public sector partner funding where possible to invest in event development and sponsorship/partnership to create and expand on events that have the capabilities to drive incremental visitation.
- Use the [event matrix](#) criteria to strategically invest in and develop new events with partner organizers.
- Support the [Lake Tahoe Destination Stewardship Council’s](#) implementation efforts to shift to a family-friendly audience through event development where appropriate.



Festival of Beer

2 Improve tourism-related infrastructure

The High Sierra region is one of the most rural regions in California, encompassing 25,000 square miles with three national parks, 20 wilderness areas and one of the biggest contiguous protected areas in the continental United States. While this makes the High Sierra region an iconic destination for outdoor recreation, sightseeing and scenic driving, it is a vast area to connect and navigate. Challenges of seasonal road access and intermittent cellular service are the norm. Additionally, increasing trends in vacation homes and the pressures of demand on the existing housing stock have made living and working in the region increasingly difficult for the tourism and hospitality workforce.

Key partners

Eastern Sierra Council of Governments, Governor’s Office of Business and Economic Development, Tahoe Regional Planning Authority

Strategies

- Increase proactive messaging to visitors throughout the region based on location and interest.
 - According to 2024 Visit California research, 50% of visitor planning is done in-market.
- Develop a transportation “pass” geared to enhancing mobility and ridership, which will contribute to alleviating traffic. For example, a hotel program in Lucerne, Switzerland, includes a rail and bus pass for the duration of a guest’s stay. The pass is tied to guest check-in and check-out dates. Stakeholders thought consideration of a pass program where hotel and lodging partners worked with the local and regional transit systems to build a “pass” into the room rate could be a valuable implementation strategy.
- Work with hospitality partners to further integrate existing microtransit options (i.e., Lake Link) to pick up and drop off employees.
- Invest in park and ride services at Yosemite National Park to alleviate traffic congestion entering the gates and within the park in coordination with the reservation system.
- Institute parking reservations at key nodes within the region for peak seasons.
 - Yosemite National Park, Palisades Tahoe, Northstar, and Heavenly Resorts have implemented a parking reservation requirement that is achieving a significant reduction in traffic congestion and a subsequent increase in ridership on the shuttle services.
 - Heavenly Resort reported a 60% reduction in traffic-related issues, while Northstar reported 48%. Palisades Tahoe reported that their initiative kept 6,000 cars off the road, increased carpooling by 150%, and alleviated traffic on local roads, increasing positive resident sentiment.
- Leverage ski resorts’ parking and shuttle systems in the summer season, which is the busier and more congested time of year in the basin.
- Add new communities to the Eastern Sierra Towns to Trails Plan to further the multijurisdictional effort on trail

development, connectivity and wayfinding across and through the region.

- Increase the available workforce by leveraging existing apprenticeship programs, such as the American Hotel and Lodging Association Foundation [Apprenticeship Program](#) and the Tourism Diversity Matters [Apprenticeship Program](#) in one or more of the three distinct career tracks: a destination track, a sports track and a meetings and events track.
- Create a platform for an employment pool as a shared resource within subregions of the High Sierra region, to enable employers to scale workforce up more easily and enable hospitality workers to increase hours more easily.
- Partner with existing job training centers (e.g., Mother Lode in Sonora), education systems and private sector partners to scale regional, seasonal workforce pipeline issues; this could be done as part of the TDM Apprenticeship Program mentioned above.



Lake Tahoe

3 Enhance regional marketing and messaging

The High Sierra Region is a highly visible region containing iconic California destinations that drove \$3.7 billion in travel spending to the region and \$354 million in state and local taxes in 2023, according to Visit California research by Dean Runyan. While that sounds like a successful visitor economy, regional stakeholders and business owners voiced challenges with seasonal impacts and the need to increase demand during off-peak times to sustain local economies.

DMOs within the region are all responsible for their own marketing efforts and have consistently worked to address these shoulder and off-peak times to drive business. However, their efforts can only reach so many in their respective target audiences with their individual and respective budgets. Visit California’s Rural Region Marketing Program was put in place to help DMOs within the rural regions come together and create a co-op to pool resources with a go-to-market strategy for reaching new and different target audiences.

Key partners

Mammoth Lakes Tourism, Visit Lake Tahoe, North Lake Tahoe Community Alliance, Visit Truckee-Tahoe, Visit Yosemite, Madera County, Eastern Sierra Sustainable Recreation Partnership, Visit California.

Strategies

- Leverage Visit California Marketing Plans to collaborate and refine social media marketing efforts.
- Engage with Visit California on social media marketing initiatives when High Sierra Regional assets are planned to be included or featured.
- Incorporate off-season messaging and alternative planning in content.
- Work with tourism businesses and partners who are actively engaged in this effort and investing further in shoulder season promotion and activations, such as Palisades Tahoe and Mammoth Lakes Tourism. This initiative should be correlated with the [event matrix](#) and [demand driver scorecard](#) initiatives mentioned in the tourism product development section.
- Leverage Visit California platforms to target travelers for special events (both natural and organized/planned).
- Identify vertical segments where there is the highest return based on existing tourism products for seasonal targeting, including:
 - Outdoor recreation
 - Arts, culture, history, and heritage
 - Events and festivals
 - Scenic and nature-based events
 - Wellness
- Cross-sell experiences with neighboring regions, including Gold Country, Central Valley and Deserts. Create a cross-regional campaign to plan itineraries and packages for like-minded experiences that exist in multiple regions.
 - Develop packages that benefit multiple regions by planning and selling leisure trips to audiences who would be more likely to take a “road less traveled” and provide alternate experiences that would relieve pressure in congested points in the High Sierra during peak season but still drive economic benefit to the region.

4 Promote community engagement and balance

Community benefit and resident engagement are key considerations for tourism stakeholders, policymakers and the entirety of the tourism-economic development ecosystem around and within a community.

According to Visit California’s Omnitrack Resident Sentiment Research from 2023, 59% residents of the High Sierra region have a high positivity about tourism overall, while 19% have a midlevel positivity rating and only 22% have a low positivity rating on the industry in their area. Those positive figures change significantly when asked about how the industry impacts them and their families, with high positivity dropping to 30%, medium to 49%, and low staying consistent at 22%. While residents support the industry and understand that it generates valuable tax revenue (58% positivity rating) and 61% say they are familiar with tourism benefits, 61% also feel strongly that it contributes to the increased cost of living, and only 42% believe it contributes positively to residents’ quality of life.

The resident sentiment data indicates the region does have support for the industry and there is a valuable contribution the industry makes to the region and to communities’ benefit; however residents are conflicted about the potential negative effects on their day-to-day lives, including rising costs, standards of living and access to housing. Additionally, stakeholder feedback further reinforced these points that resident and community engagement need to be a priority at the local level.

The core priorities and strategies mentioned in this plan are all aimed at advancing the regional tourism ecosystem, and this need for communication, messaging and overall engagement is no different. The High Sierra region is a highly desirable place to live and visit, and the need to find balance is critical to future success. Many partners across the region are working toward the collective goal of balancing the region’s supply and demand, including DMOs, economic development agencies, community advocacy groups, sustainable recreation providers and advocates, and many more. To further these goals, there need to be continued efforts to work with the residents and support a sustainable model.

Key partners

Mammoth Lakes Tourism, Visit Lake Tahoe, North Lake Tahoe Community Alliance, Visit Truckee-Tahoe, Visit Yosemite, Madera County, Eastern Sierra Sustainable Recreation Partnership, Eastern Sierra Council of Governments, Governor’s Office of Business and Economic Development, Tahoe Regional Planning Authority

Strategies

- Develop a regional communications strategy to drive consistency in approach, share best practices and advance the industries efforts.
 - The Tahoe Basin already has its [Destination Stewardship Plan](#) and the council of committed organizations that have signed on to work the plan. That group meets regularly to share data, communicate and plan for implementation.
 - Similarly, [ESSRP](#) meets monthly with similar goals for the Eastern Sierra region. These meetings are well-attended and staffed and provide a strong communication platform.
 - Representatives from these groups and others should meet on a regular cadence to share information and advance implementation work across the region. This was done during the planning process for the region, and stakeholders saw benefit from regular communication across the region.
- Increase awareness, share resources and have two-way conversations with communities and community-based organizations.

- Work with regional partners to establish a regular communications schedule and touchpoints, including leveraging Visit California presence when appropriate.
- Develop new key performance indicators for tourism performance that impact residents and share outcomes on a regular basis (annual, seasonal, etc.). KPIs could include:
 - Visitor dispersal and flow (percent of visitors dispersed to new and diverse points of interest)
 - Traffic counts and reduction
 - Job retention and mitigation of seasonal impact to the economy
 - Sales and use taxes reinvested in the community
- Share and collaborate on resident sentiment research data, including Visit California data.
- Develop a regionwide ambassador program.
 - Work with local DMOs to identify where existing ambassador programs already exist and determine leverage points
 - Work with public and private sector partners to grow the program with increased volunteers and identify the highest need times for ambassador placements



Mammoth Lakes

Conclusion

The High Sierra Regional Strategic Tourism Plan represents a pivotal moment in the effort to enhance and sustain the region’s unique tourism landscape. Developed through an extensive two-year process involving comprehensive stakeholder engagement, in-depth market research and strategic analysis, the plan provides a robust framework to guide the High Sierra toward a more resilient, diverse, and sustainable tourism future.

Research efforts, including the [tourism readiness index](#), [demand driver scorecard](#), and [event matrix](#), have offered invaluable insights into the region’s strengths and opportunities. Classified as an emerging performer with strong seasonal performance but still room for smart growth in shoulder and off-season periods, the High Sierra demonstrates potential for strategic increases in visitation while necessitating careful management of visitor flows and infrastructure.

The strategic priorities — investing in tourism product development, improving tourism-related infrastructure, and enhancing regional marketing and messaging, and promoting community engagement and balance—form the cornerstone of the vision. These priorities address the unique challenges and opportunities presented by the High Sierra’s vast and diverse landscape, from iconic destinations like Yosemite National Park and Lake Tahoe to the region’s rich cultural and historical assets.

Balancing the renowned outdoor recreation assets, which comprise 61% of scored attractions, with diversification of tourism offerings is central to the strategy. By investing in cultural tourism, developing new lodging options and strategically enhancing events, the plan aims to create year-round appeal while mitigating peak season pressures.

Success relies on continued collaboration among a diverse set of stakeholders, including DMOs, land management agencies, local businesses, and community organizations. The High Sierra’s vast geography and largely public land ownership present unique challenges requiring innovative solutions.

Emphasis on resilience and sustainability is paramount. Initiatives such as implementing reservation systems at popular sites and supporting partnership efforts demonstrated by the Lake Tahoe Stewardship Council and the Eastern Sierra Sustainable Recreation Partnership will define the success of the High Sierra region for years to come.

The path forward demands adaptability and perseverance. The dynamic tourism landscape necessitates a response to challenges such as climate change impacts and evolving visitor expectations. Confidence remains that adherence to the vision can create a High Sierra region tourism ecosystem exceeding visitor expectations while enhancing residents’ quality of life.

Heartfelt gratitude is extended to all contributors, including regional advisory committee members and numerous stakeholders who shared their insights and expertise. Their dedication has been instrumental in crafting a plan reflecting the spirit and aspirations of the High Sierra region.

Embarking on the implementation of these strategies is marked by optimism and determination. The High Sierra, with its breathtaking landscapes and rich cultural tapestry, has long captivated visitors from around the world. This strategic plan aims to ensure it continues to do so for generations, fostering economic growth, environmental stewardship and community well-being.



Appendix

Regional advisory committee members

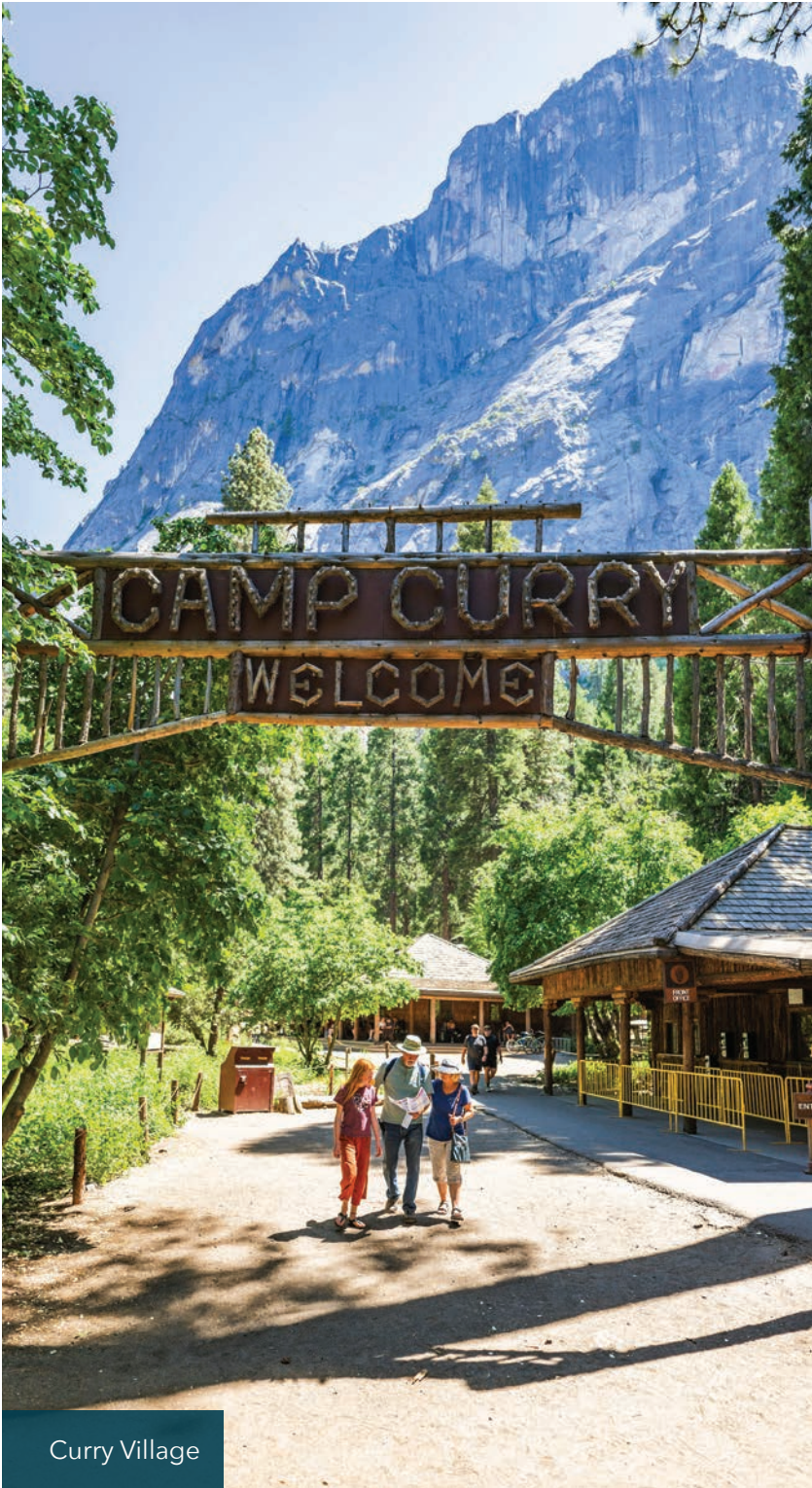
We would like to extend our heartfelt appreciation to the entire Visit California team, the dedicated members of the regional advisory committee, as well as the stakeholders and partners across the community who actively participated in the regional strategic tourism planning process for the High Sierra region. Without their unwavering support and commitment, this plan would not have been possible. Thank you all for your contributions.

Name	Organization
Anthony Cupaiuolo	Tahoe Backcountry Alliance
Benjamin Barry	Sierra Nevada Conservancy
Brandon "DJ" Ewan	Granlibakken Management Company
Bryan Hammill	Aramark & Yosemite Hospitality
Carol Chaplin	Visit Lake Tahoe
Colleen Dalton	Visit Truckee-Tahoe
Elaine Kabala	Eastern Sierra Council of Governments
Erika Harvey	Sierra Business Council
Gavin Feiger	Keep Tahoe Blue
John Rice	California Ski Industry Association, Sierra-at-Tahoe
John Urdi	Visit Mammoth
Jonathan Farrington	Yosemite Mariposa County Tourism Bureau
Matt Peterson	Palisades Tahoe
Ron Cohen	Alterra Mountain Company, Mammoth & June Mountain Ski Areas
Scott Gediman	Yosemite National Park
Stephen Suderman	Governor's Office of Business and Economic Development
Tawni Thomson	Bishop Chamber of Commerce and Visitors Bureau
Tony Karwowski	North Tahoe Community Alliance

Engaged destination marketing organizations and convention and visitors bureaus

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

Organization
Bishop Chamber of Commerce and Visitors Bureau
Lake Tahoe Visitors Authority - South Shore
Mammoth Lakes Tourism
North Tahoe Community Alliance
Visit Truckee-Tahoe
Yosemite Mariposa County Tourism Bureau
Visit Yosemite Madera County



Curry Village

Destination plans review database

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

City/County	Name of Plan
Bishop	General Plan
Chowchilla	City of Chowchilla 2040 General Plan
Eastern Sierra Region	Eastern Sierra Sustainable Recreation Partnership Sustainable Recreation & Tourism Initiative Plan
Eastern Sierra Region	Towns to Trails Plan
Eastern Sierra Region	Recreate Responsibly Guide
Lake Tahoe	Lake Tahoe Destination Stewardship Plan
Lake Tahoe	Lake Tahoe Destination Stewardship Plan - Action Plan
Mammoth Lakes	Town of Mammoth Lakes General Plan
Palisades Tahoe	Palisades Tahoe Development Plan
Porterville	Porterville 2030 General Plan
South Lake Tahoe	City of South Lake Tahoe General Plan
Truckee	2040 General Plan
Truckee	Visit Truckee-Tahoe Destination Management Plan

Focus group attendees

We extend our sincere gratitude to all the focus group participants whose valuable insights and contributions were essential to the development of this plan. Your time and expertise are deeply appreciated.

Name	Organization
Kevin Shelton	OTO Hotels
Mark Choe	Pine Resort in Bass Lake
Jerry Bindel	Forest Suites
Rich Bodine	Hotel Azure
Sunil Lad	Best Western Bishop Lodge, Comfort Inn Bishop
Niral Munshaw	Vagabond Inn
David Bhakta	Holiday Inn Express in Bishop
Jared Smith	Parchers Resort & South Lake Landing
Lauralynn Hundley	Mount Williamson Motel
John Morris	Snowcreek Resort
Eric Clark	Mammoth Mountain
Brent Traux	Outbound Mammoth
Leisha Baldwin	Westin Monache
Brent Cooley	Empeiria High Sierra Hotel
David Holland-Moritz	multiple short-term rentals owner
Steve Engfer	Mariposa County, County Planning Department
Liz Skelton	Yosemite Blue Butterfly Inn
Yuli Gotsev	The Redwoods in Yosemite
Jill Schott	Tahoe Moon Properties
Colin Perry	The Ritz-Carlton, Lake Tahoe
Jorge Negrete	Pedal Forward Bikes and Adventures
Michelle Miller	Miller's Landing Resort
Tom Fortune	Heavenly Mountain Resort
John Rice	California Ski Industry Association, Sierra-at-Tahoe
Ben Fish	Tahoe Area Mountain Bike Association
Morgan Steel	Tahoe Rim Trail Association
Craig London	Rock Creek Pack Station
Gary Gunsolley	Flying Fishing Guide, Bishop
Howie Schwartz	Sierra Mountain Guides
Ron Cohen	Alterra Mountain Company, Mammoth & June Mountain Ski Areas
Julie Brown	June Mountain
Kim Anaclerio	Mammoth Lakes Recreation
Lawson Reif	Town of Mammoth Lakes, Office of Outdoor Recreation
Stuart Brown	Town of Mammoth Lakes, Parks and Recreation
Fred Wong	USFS District Ranger

Focus group attendees (cont.)

Bill Sauser	Town Council, OSV Recreation
Shannon Hansen	Mariposa County
Darren Rose	Madera County Economic Development
Robert Macaulay	District 5 County, Madera
Joe Irvin	City of South Lake Tahoe
Brooke Laine	El Dorado County District 5
Scott Fair	NAI Tahoe Sierra
Lew Feldman	Heritage Commercial Real Estate & Technology Investments
Steve Teshara	Sustainable Community Advocates
Cody Bass	City of South Lake Tahoe
Scott Robbins	City of South Lake Tahoe
Deston Dishion	City of Bishop
Meaghan McCammon	Eastern Sierra Tri-County Fair and Event Center
Jennifer McGuire	Eastern Sierra Tri-County Fair
Jennifer Roeser	Inyo County District 4
Dan Holler	Town of Mammoth Lakes
Rob Patterson	Town of Mammoth Lakes
Ken Brengle	Mammoth Lakes Chamber of Commerce
Briana Goico	Mammoth Lakes Chamber of Commerce
Sandra Moberly	Mono County Chief
Jeff Simpson	Mono County Tourism
John Wentworth	Mammoth Lakes Town Council, Mammoth Lakes Trails & Public Access Foundation
Rhonda Duggan	Mono County Supervisors
Nate Greenberg	Inyo County
Tawni Thompson	Bishop Chamber of Commerce and Visitors Bureau
Ingrid Braun	Mono County Sheriff's Office
Dan Casabian	Mammoth Lakes Police Department
Alex Tomaire	Mammoth Lakes Fire Department
Dallin Kimble	Mariposa County
Jonathan Farrington	Yosemite Mariposa County Tourism Bureau
Samir Tuma	Kila Properties
Cindy Gustafson	Placer County District 5
Casey Hawkins	South Gate Brewing Company
Debbie Brown	Cold Water Brewery & Grill
Ted Kennedy	Tahoe Restaurant Group
Gary Castele	Heavenly Shops
Karen Schwartz	Sage to Summit
Manuel Astorga	Astorga's Mexican

Focus group attendees (cont.)

Sarah Freundt	Grocery Outlet
Scott Piercey	High Country Lumber - Ace Hardware
Marianne Schat	Schat's Bakery
Aaron Schat	Whiskey Creek Restaurant, Schat's Roadhouse
Robin Bolser	Great Basin Bakery
Camille Miller	Mammoth Fun Shop
Tom Cage	Kitterdge Sports
Silver Chesak	Footless Sports
Larry Crabb	Sierra Mountain Club
Jeremy Goico	Black Tie Ski Rentals
Steve Klassen	Wave Rave Snowboard Shop
Joanie Schaler	Robertos Café
Russ Squire	Gomez Restaurant
Alisa Harper	Warming Hut Restaurant
Brandon Brocia	The Eatery
Ryan Radcliff	Side Door Wine Bar & Cafe
Billy Dever	Black Velvet Coffee
Taylor Kumlue	Noodle-ly Restaurant
Travis Medlock	Vines & Vittles, Little Shop of Ramen, The Local Grape
Rebecca Sullivan	Ridgeline Galley and Gifts
Scott Zumwalt	West Shore Market
Tom Turner	Tahoe Restaurant Collection
Erin Capuchino	Yosemite Sequoia Resource Conservation and Development Council
Raymond Suarez	South Shore Transportation Management Association
Carl Hasty	Tahoe Transportation District
Amy Berry	Tahoe Fund
Darcie Collins	The League to Save Lake Tahoe
Jeff Cowen	Tahoe Regional Planning Agency
Devin Middlebrook	Tahoe Regional Planning Agency
Jeff Gabriel	Eastern Sierra Interpretive Association
Carissa Gospodinoff	Eastern Sierra Land Trust
Ben Ditto	Bishop Climbers Coalition
Kendra Knight	Waste Connections Recycling
Pam Bold	High Sierra Energy Foundation
Robert Joki	Southern Mono Historical Society
Stacey Corless	Sierra Nevada Conservancy
Ben Goger	Mariposa County
Ellen Bergstone-Wasil	Yosemite Mariposa County Tourism Bureau

Focus group attendees (cont.)

Heather M Segale	UC Davis Tahoe Environmental Research Center
Julia Tholen	Tahoe Truckee Transportation Management Association
Patricia Robertson	Mammoth Lakes Housing
Phil Moores	Eastern Sierra Transit
Haislip Hayes	Town of Mammoth Lakes
Sarah Philips	Motherload Job Training, Mariposa
Jaime Wright	Placer County Transportation
Stephanie Holloway	Placer County Deputy CEO for Tahoe
Anna Marie dos Remedios	Idle Hour Winery & Kitchen
Cristi Quesada-Costa	Dos Alas Cuban Café & Lounge
Laura Beardsley	Disabled Sports Eastern Sierra
Andrea Walker	Stellar Brew
Anita Westfall	Get Outdoors 365
Willow Polson	Northern Mariposa County History Center
Teresa Crimmens	Sierra Community House
Erin Casey	Tahoe Housing Hub
Scott Gediman	Yosemite National Park
Tara Frank	Owens Valley Paiute-Shoshone Cultural Center
Jose Garcia	City of Bishop
Rebecca Carr Wong	National Park Service Devils Postpile
Chris Buehrer	USFS Recreation
Chris Rardin	California Highway Patrol
Carol Chaplin	Visit Lake Tahoe
John Urdi	Visit Mammoth
Tony Karwowski	North Tahoe Community Alliance
Colleen Dalton	Visit Truckee-Tahoe
Rhonda Salisbury	Visit Yosemite Madera County

Stakeholder interviewees

We would like to express our sincere thanks to our stakeholders and interviewees for their collaborative spirit and willingness to share their knowledge. Their partnership was invaluable in achieving the goals of this project.

Name	Organization
Anthony Cupaiuolo	Tahoe Backcountry Alliance
Benjamin Barry	Sierra Nevada Conservancy
Brandon "DJ" Ewan	Granlibakken Management Company
Bryan Hammill	Aramark & Yosemite Hospitality
Carol Chaplin	Visit Lake Tahoe
Colleen Dalton	Visit Truckee-Tahoe
Darcie Goodman Collins	Keep Tahoe Blue
Elaine Kabala	Eastern Sierra Council of Governments
Erika Harvey	Sierra Business Council
John Rice	California Ski Industry Association, Sierra-at-Tahoe
John Urdi	Mammoth Lakes Tourism
John Wentworth	Mammoth Lakes Town Council, Mammoth Lakes Trails & Public Access Foundation
Jonathan Farrington	Yosemite Mariposa County Tourism Bureau
Mark Choe	The Pines Resort
Matt Peterson	Palisades Tahoe
Rhonda Salisbury	Visit Yosemite Madera County
Ron Cohen	Alterra Mountain Company, Mammoth & June Mountain Ski Areas
Scott Gediman	Yosemite National Park
Stacy Corless	Sierra Business Council
Stephen Suderman	Governor's Office of Business and Economic Development
Tawni Thomson	Bishop Chamber of Commerce and Visitors Bureau
Tony Karwowski	North Tahoe Community Alliance

Visited points of interest

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

Point of Interest	Location	Point of Interest	Location
Inyo National Forest	Eastern Sierra	Yosemite	Yosemite National Park
Emerald Bay State Park	Lake Tahoe	Yosemite Valley	Yosemite National Park
Tahoe City	Lake Tahoe	Twin Falls Overlook	Yosemite National Park
Homewood	Lake Tahoe	Tioga Pass Entrance	Yosemite National Park
Whoa Nellie Deli	Lee Vining	Tuolumne Meadows	Yosemite National Park
Downtown Mammoth Lakes	Mammoth Lakes	Tenaya Lake	Yosemite National Park
Horseshoe Lake	Mammoth Lakes	Tunnel View	Yosemite National Park
Convict Lake	Mammoth Lakes	Mariposa Grove of Giant Sequoias	Yosemite National Park
The Westin Monache Resort	Mammoth Lakes	Village Store	Yosemite National Park
Mammoth Westin	Mammoth Lakes	Basecamp Eatery	Yosemite National Park
Mariposa Museum and History Center	Mariposa	Yosemite Valley Lodge	Yosemite National Park
Yosemite Climbing Association Museum & Gallery	Mariposa	The Ahwahnee Hotel	Yosemite National Park
Mariposa County Courthouse	Mariposa	Yosemite Valley Lodge	Yosemite National Park
Mariposa County Fairgrounds	Mariposa		
Downtown Mariposa	Mariposa		
Palisades Tahoe + Olympic Valley	Olympic Valley		
Palisades Air Tram	Olympic Valley		
Camp Richardson (Pope Beach/Baldwin Beach)	South Lake Tahoe		
El Dorado Beach - South Lake Tahoe	South Lake Tahoe		
Heavenly Shops	South Lake Tahoe		
Black Bear Lodge	South Lake Tahoe		
Heavenly Black Bear Lodge	South Lake Tahoe		
Edgewood Tahoe Resort	Stateline		
Downtown Truckee	Truckee		
Donner Lake	Truckee		
Truckee Springhill Suites	Truckee		

Global destinations’ readiness for sustainable tourism

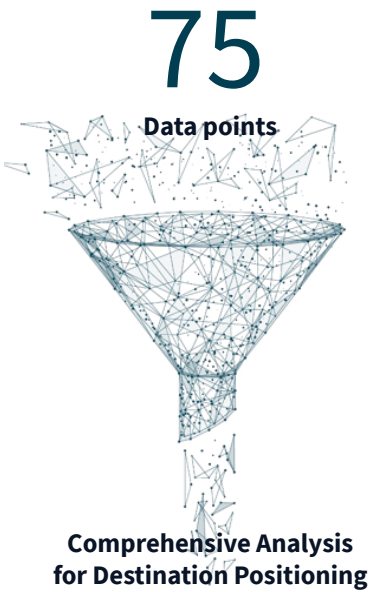
- Tourism readiness index is the product of a partnership between JLL and the World Travel & Tourism Council to assess global cities’ tourism readiness.
- While readiness will depend on the ambitions and goals of every city, WTTC & JLL define tourism readiness as a strategic and all-inclusive approach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

Tourism readiness index

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



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



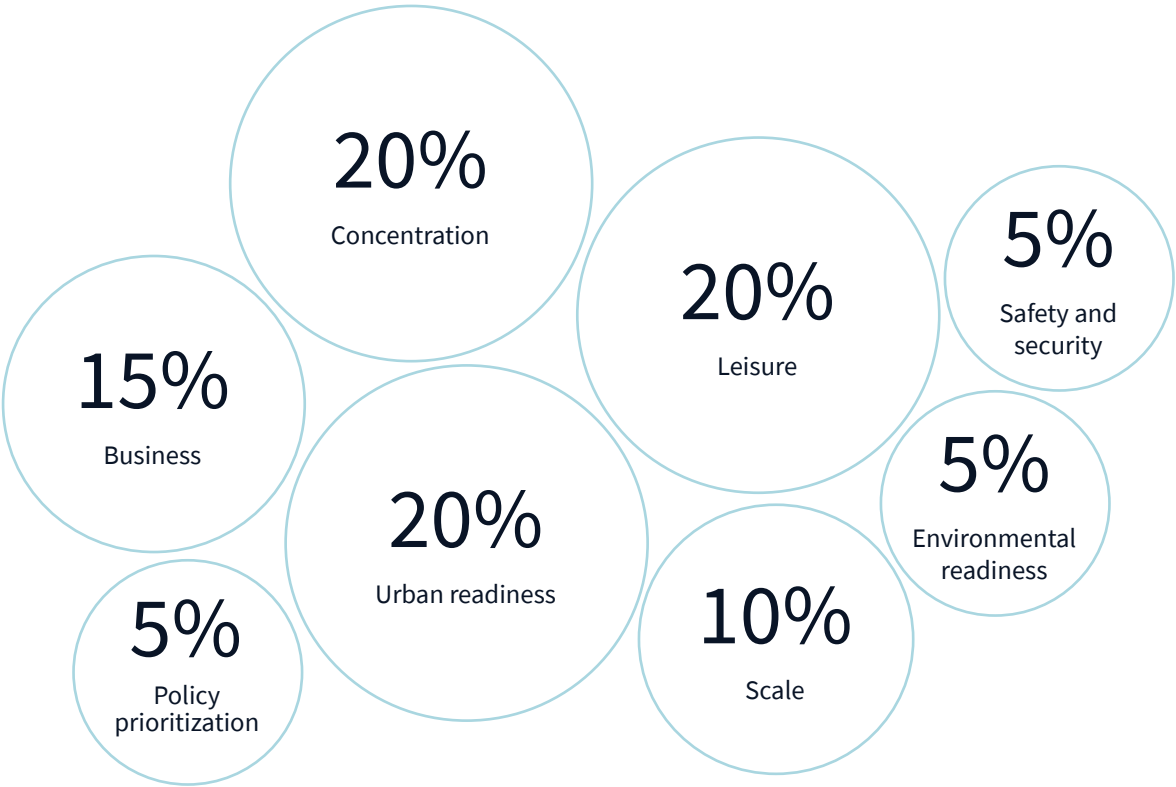
Tourism Readiness Index Categories

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

Levels of readiness | Destination typologies

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

Weights by category



High Sierra results

Outcome by pillar



Figure 1- High Sierra Tourism Readiness Index Outcome

Demand driver scorecard

Process — multistep assessment of destination assets



Utilize visitor traffic and flow data to assess current demand



Place individual assets on scale based on eight criteria to score



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



Utilize the outcome to identify future competitive positioning



Recommend new investment or enhancement to grow assets on the scale

Score card elements

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

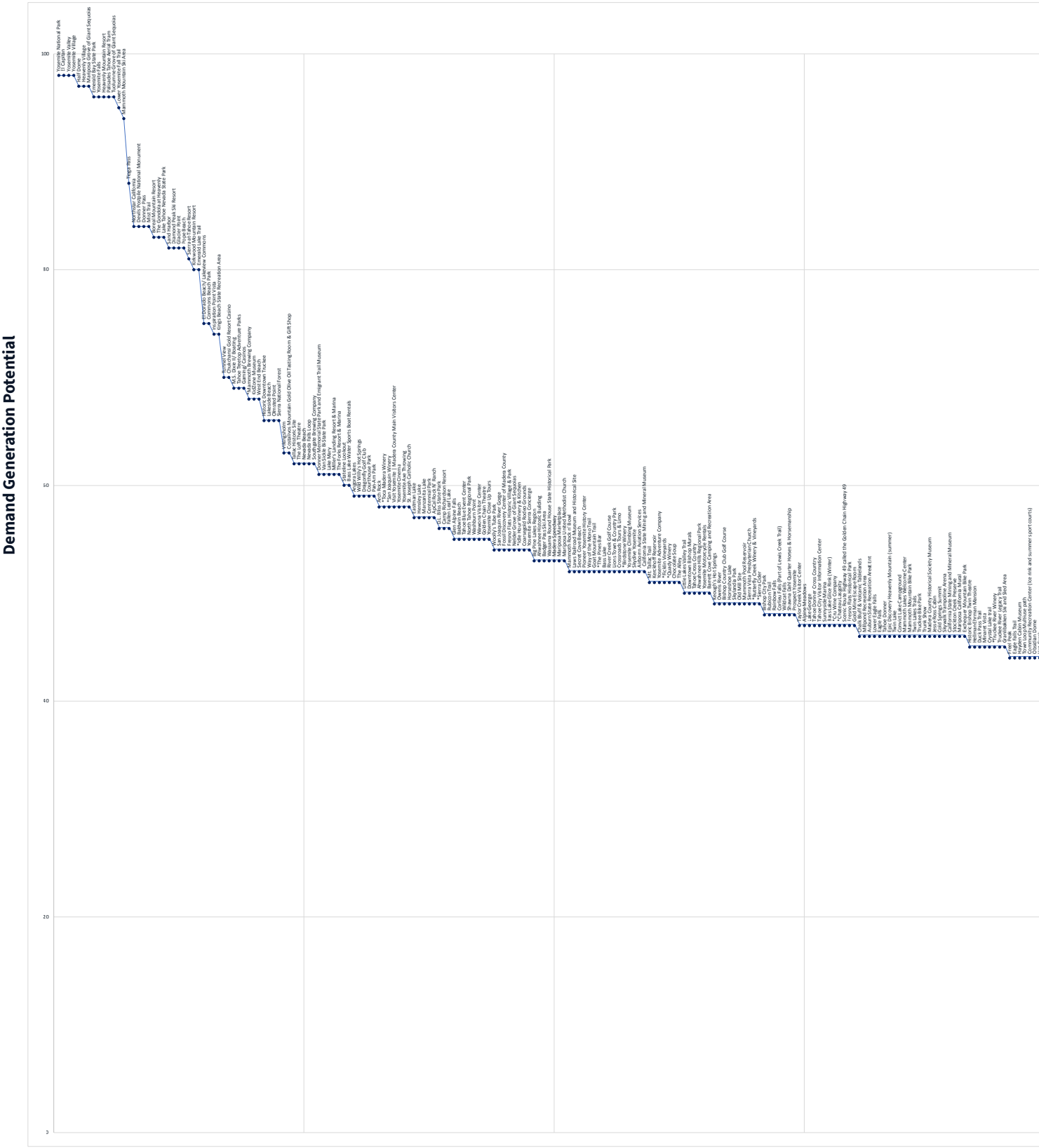
Score Card: Eiffel Tower sample scoring

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



Mammoth Lakes

High Sierra demand drivers



High Sierra demand drivers



Event matrix

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



Identify key events serviced by the region



Rate events on matrix using 11 criteria



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



Work with organizers on tactics for implementation

Program components

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

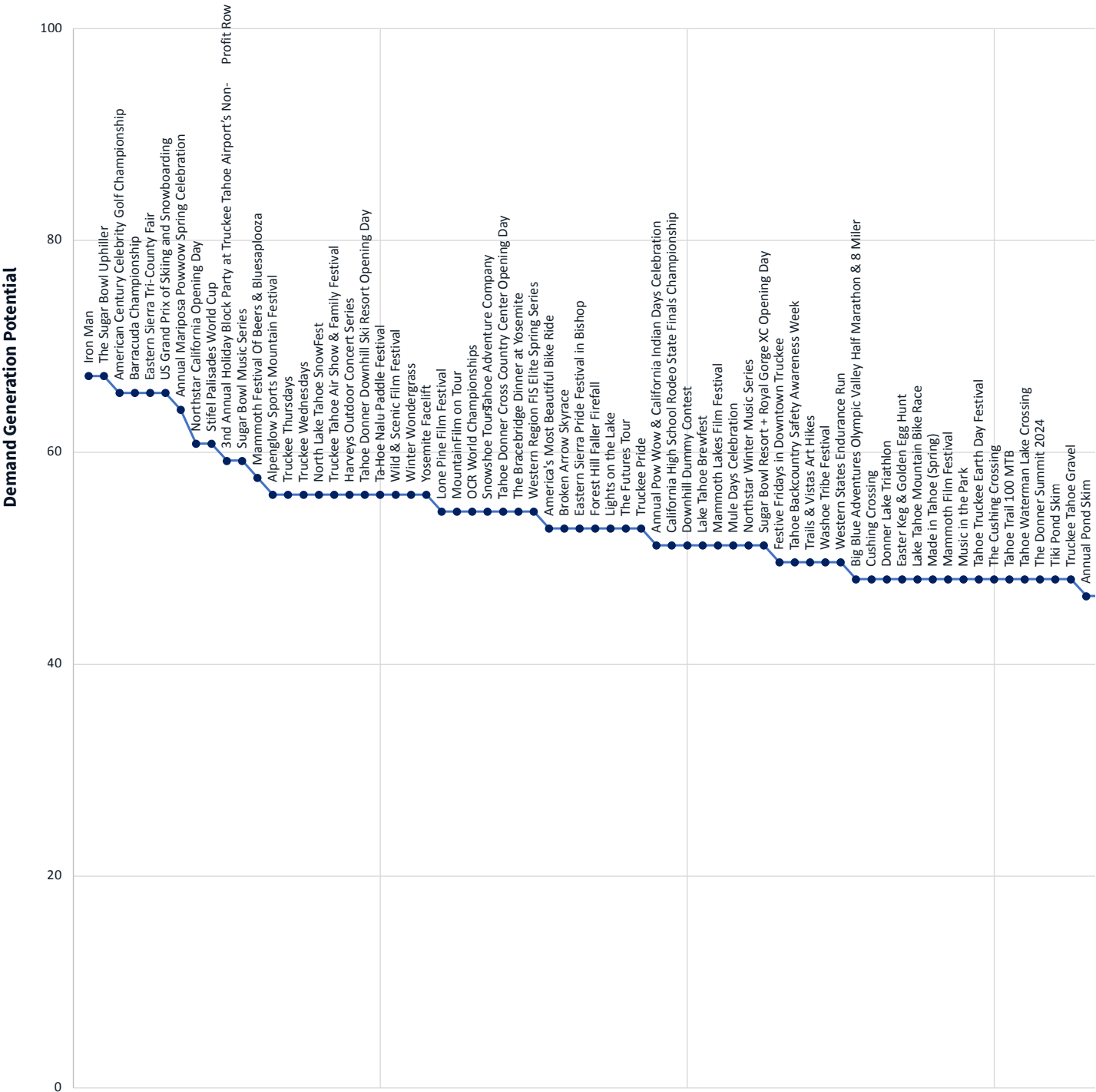


Northstar Resort

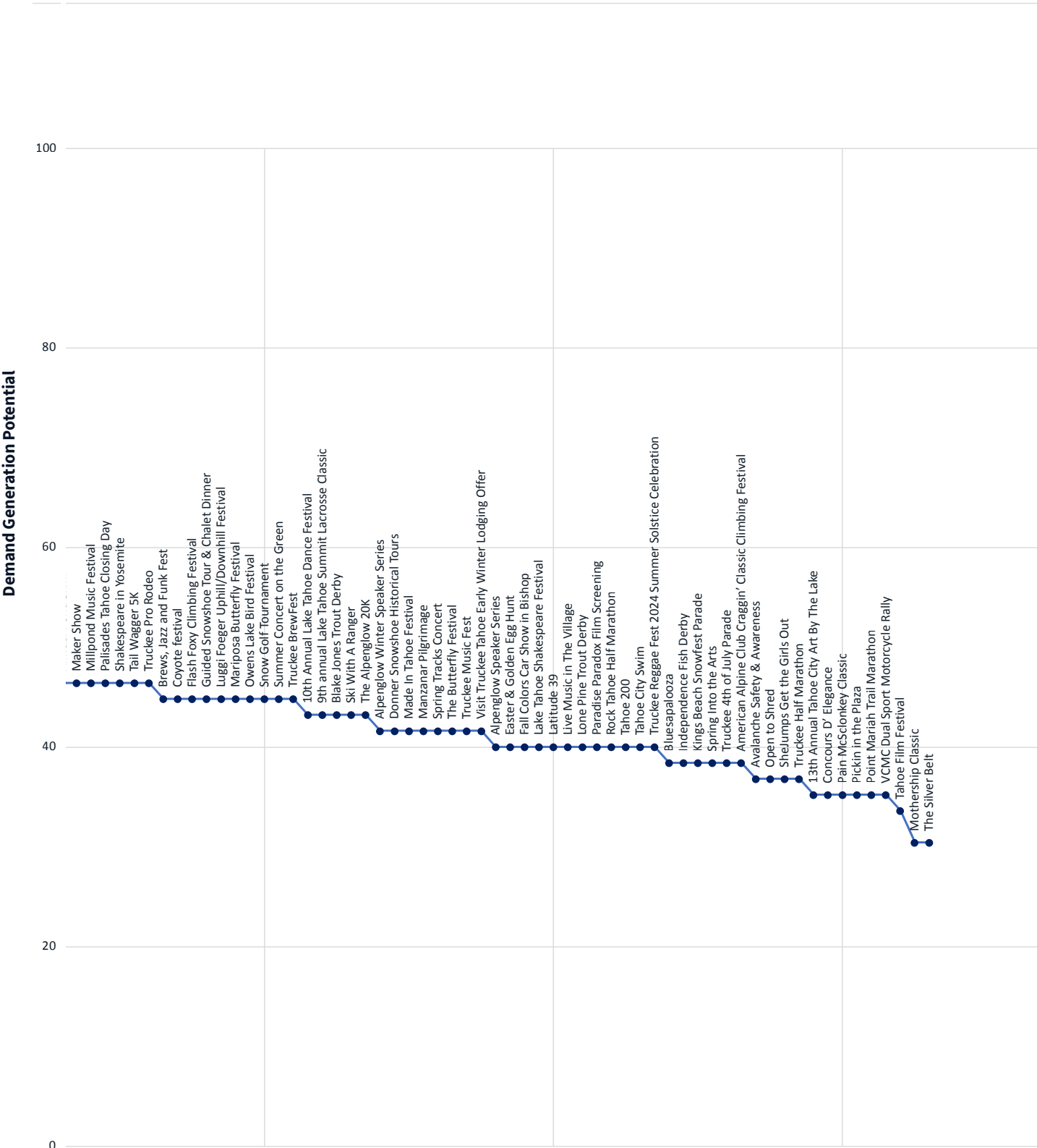
Program Components

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

High Sierra leisure events



High Sierra leisure events





JLL

SEE A BRIGHTER WAY