



2025 Visit Placer Tourism & Quality of Life Summit

THURSDAY, MARCH 20, 2025



What we will cover today

1. State of tourism + Placer County impacts
2. Visit California's international approach
3. California – the Ultimate Playground
4. Placer County at play – features in Visit California content
5. Statewide programs & support
6. Q&A

Lynn Carpenter

Senior Vice President of
Marketing

Visit California





- Officially formed in 1996
- Nonprofit 501(c)6
- 16,500+ assessed businesses
- Mission: create desire for the California experience
- 37-member board of directors



Board Leadership



USA

INSPIRATION

visit
California™

PLANNING



TRANSACTION

ACCOMMODATIONS
RENTAL CARS
ATTRACTIONS
RESTAURANTS &
RETAIL
TRANSPORTATION



State of Tourism

CALIFORNIA TOURISM MONTH



California Tourism Month

- Economic impact of tourism
- Data by legislative district
- Keep travel spending in California
- Support Los Angeles post-fires



Visitor Spending

\$150.4
BILLION

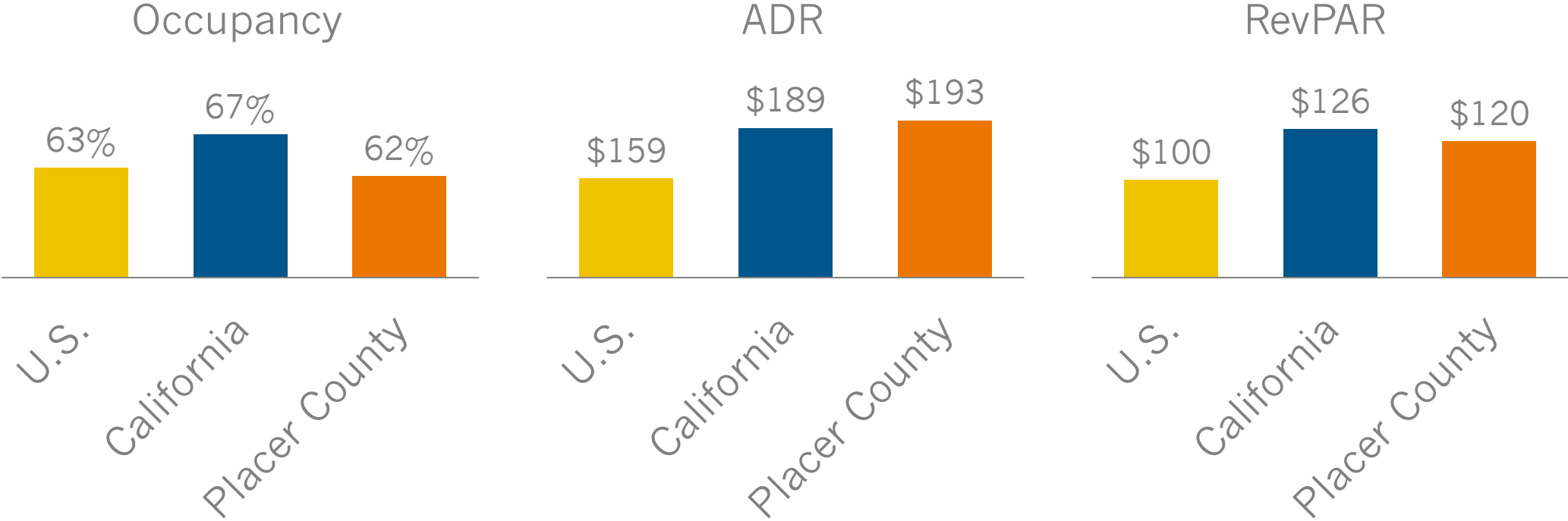
Jobs

1.2
MILLION

State and Local
Tax Revenue

\$12.7
BILLION

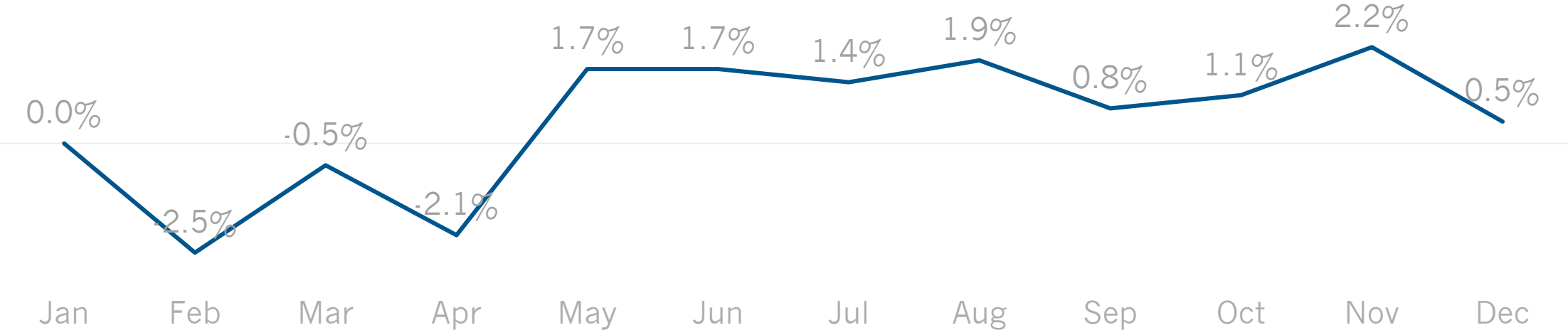
Hotel indicators are strong...



Source: CoStar (2024)

California room demand

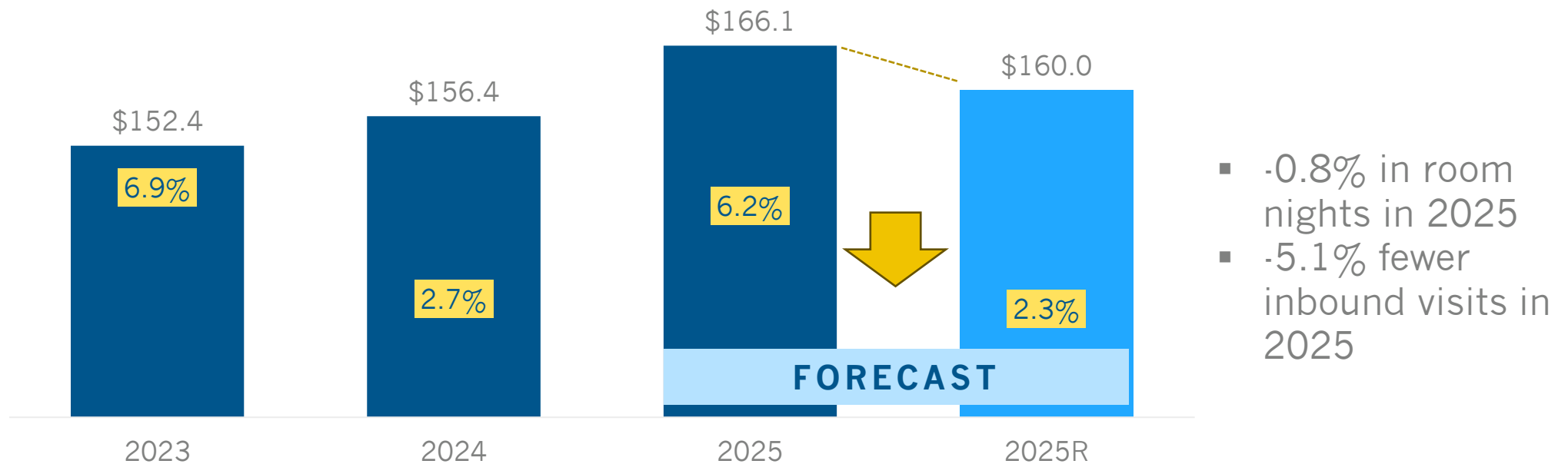
YOY % Change in Room Demand



Source: CoStar, 2024

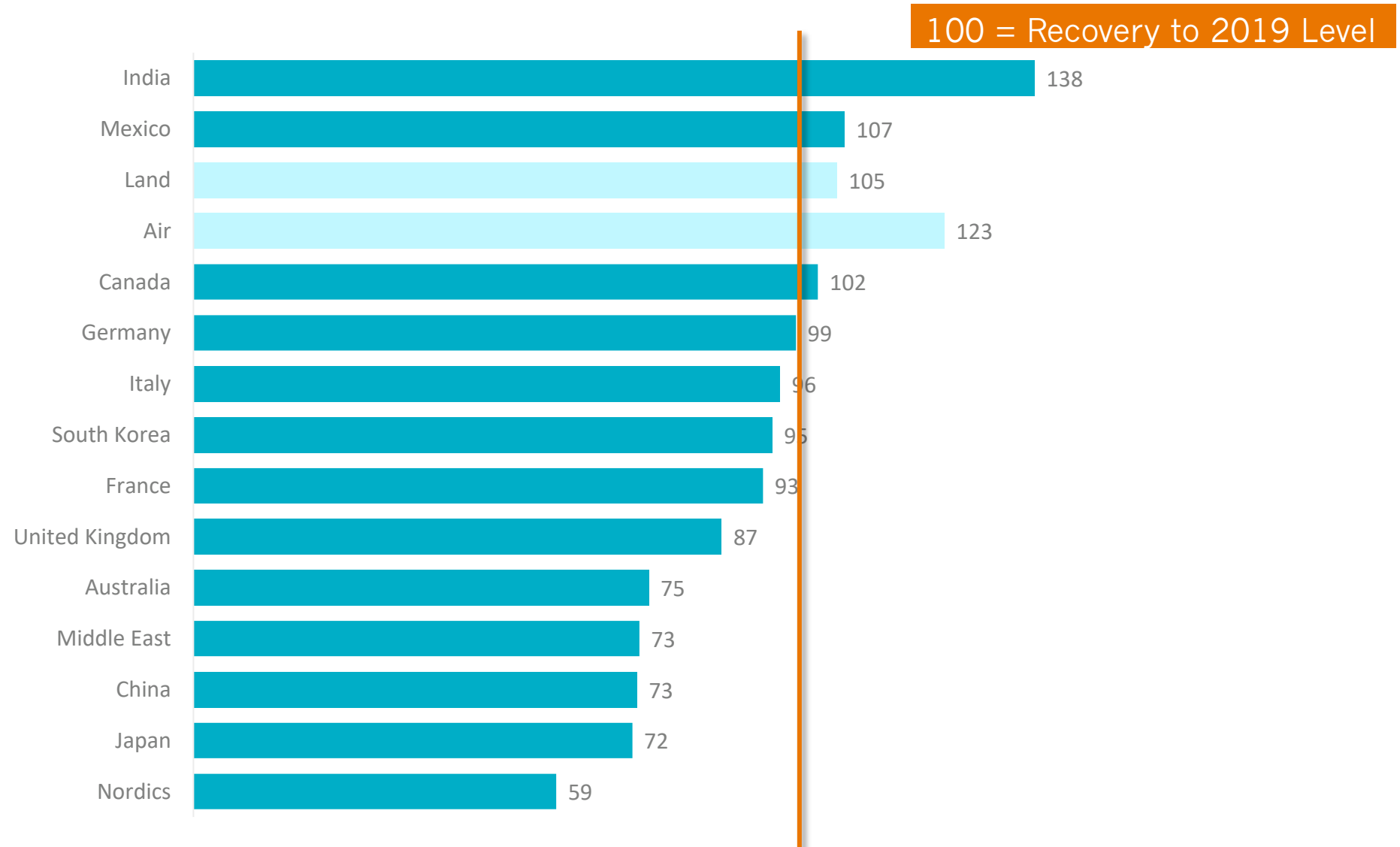
California Travel Spending Forecast

Total California Travel Spending (billions)
and YOY Growth Rate



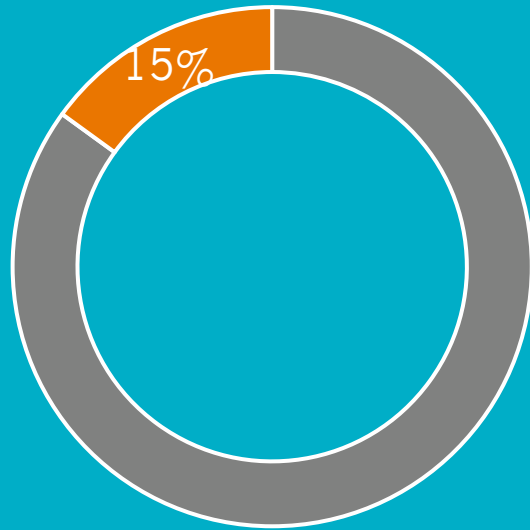
Source: Tourism Economics (February 2025 and March revision)

Visitation Levels - 2024

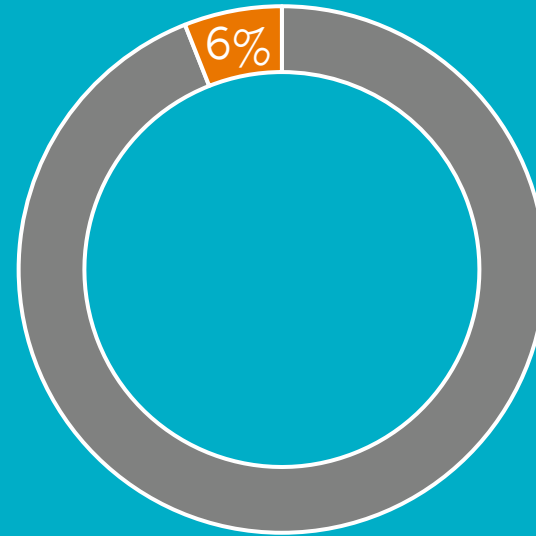


International Market Share (2023)

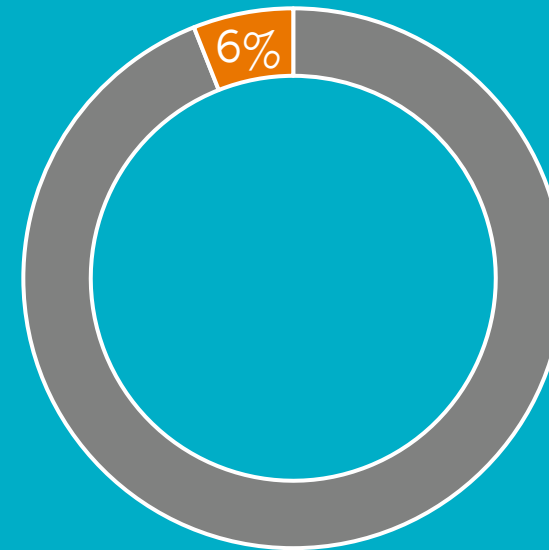
California



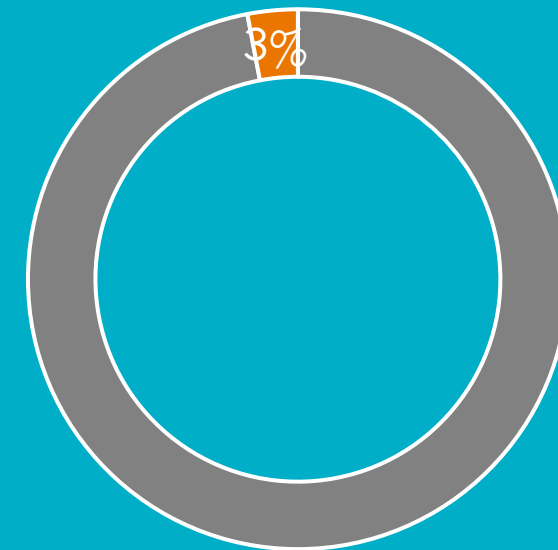
Rural Regions



High Sierra



Gold Country



■ Domestic ■ International

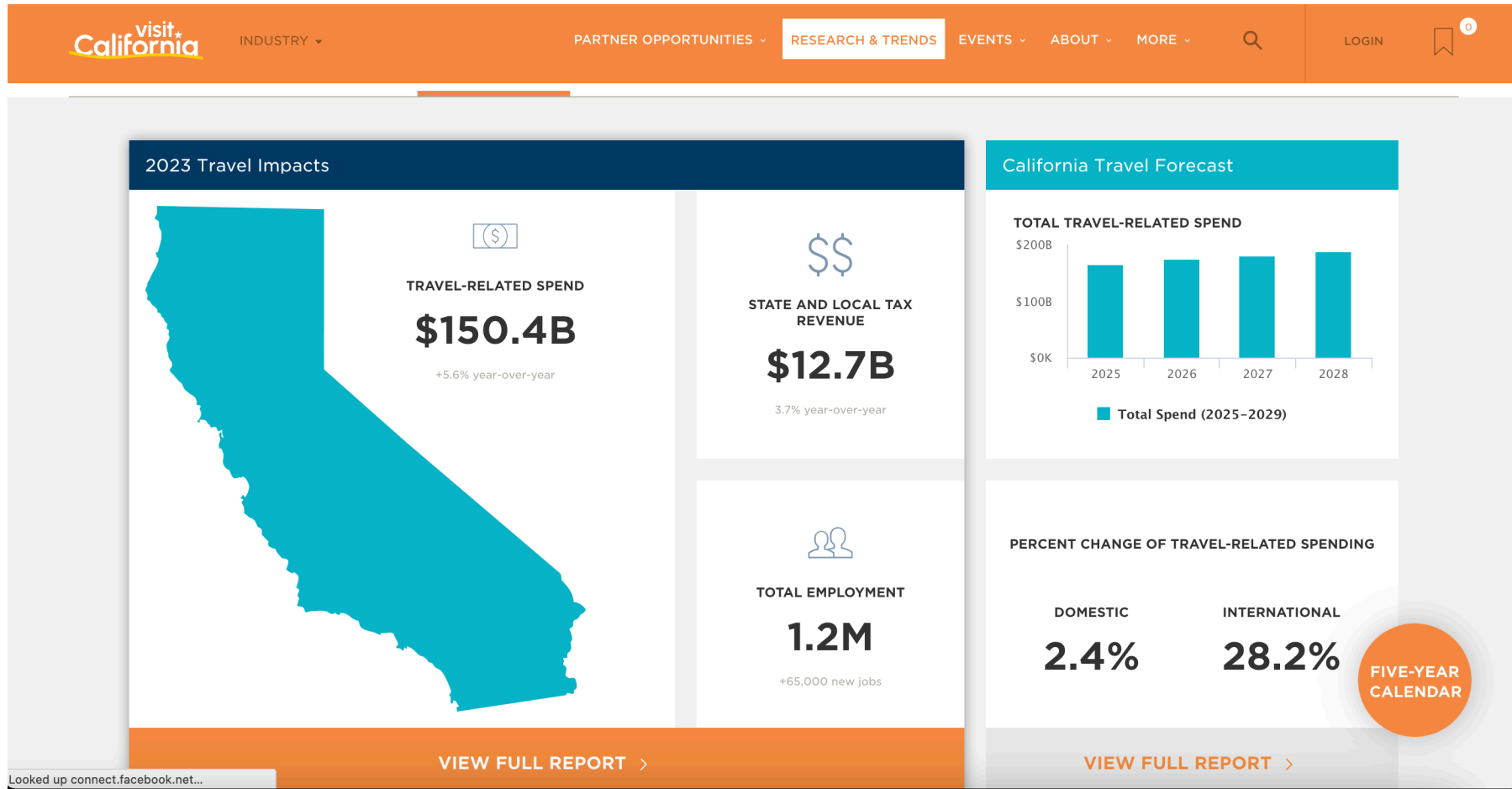
Visitor Spending: International Markets (2023)

Markets	Spending (\$B)	California	High Sierra	Gold Country
		% Share of Int'l Spend	% Share of Int'l Spend	% Share of Int'l Spend
Mexico	\$4.069	18.0%	11.1%	16.7%
Canada	\$3.556	15.8%	5.9%	20.3%
China	\$1.424	6.3%	3.2%	7.2%
UK	\$1.321	5.9%	9.8%	5.6%
Australia	\$1.260	5.6%	7.6%	5.3%
India	\$1.205	5.3%	4.0%	5.7%
France	\$1.049	4.7%	11.4%	3.6%
Germany	\$0.983	4.4%	12.6%	5.0%
South Korea	\$0.952	4.2%	1.1%	2.9%
Japan	\$0.822	3.6%	0.6%	3.0%
Italy	\$0.419	1.9%	3.1%	1.5%
Nordics	\$0.342	1.5%	2.4%	1.4%
Middle East	\$0.275	1.2%	0.4%	0.5%
Rest of World	\$4.868	21.6%	26.8%	21.4%
TOTAL	\$22.549	100%	100%	100%



Placer County Tourism

Regional/County Travel Impacts



Placer County Economic Impact



PLACER TRAVEL-RELATED SPENDING

\$1.4B



PLACER STATE AND LOCAL TAX REVENUE

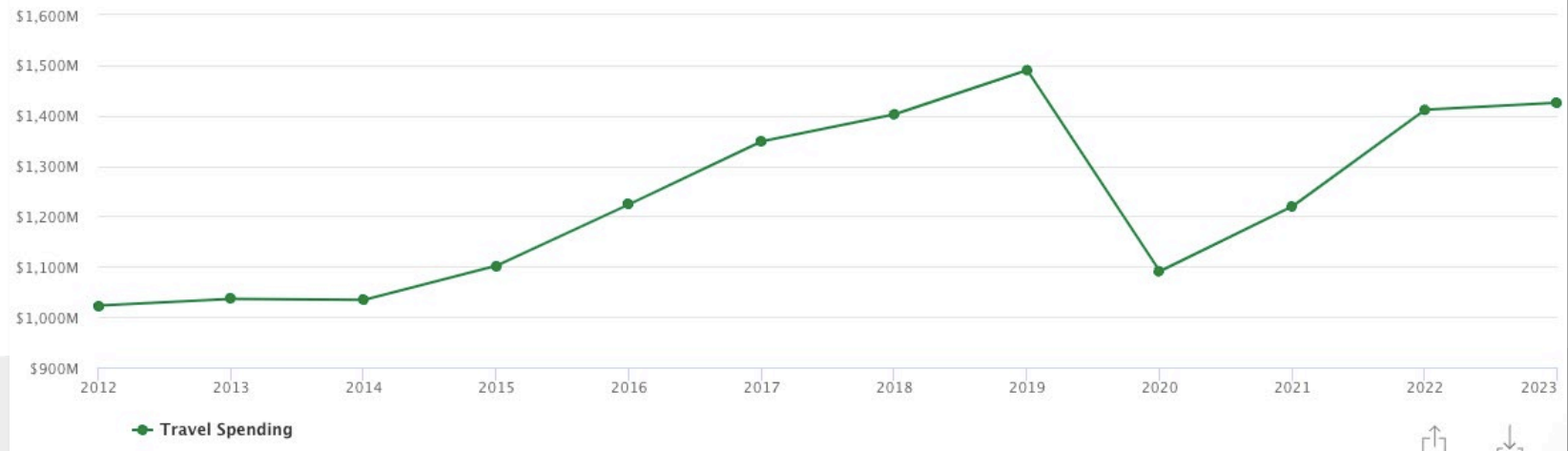
\$127.9M



PLACER EMPLOYMENT

17.0K

PLACER HISTORY OF TRAVEL SPENDING IN CALIFORNIA



Placer / Impacts, Summary

Direct Travel Impacts, 2014-2023p

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	% Chg. 22-23
Direct Travel Spending (\$Millions)											
Visitor Spending	965	1,035	1,162	1,274	1,315	1,397	1,057	1,159	1,321	1,336	1.2%
Other Travel*	70	64	62	75	87	93	34	61	91	90	1.5%
Total	1,034	1,099	1,224	1,349	1,403	1,490	1,091	1,220	1,411	1,425	1.0%
Visitor Spending by Type of Traveler Accommodation (\$Millions)											
Hotel, Motel, STVR	543	605	718	804	813	866	727	659	745	741	-0.4%
Hotel, Motel**								369	420	420	0.0%
Short Term Vacation Rental**								291	325	322	-1.0%
Private Home (VFR)	152	157	159	172	189	206	67	220	244	251	3.1%
Seasonal Home (2nd Home)	111	109	110	116	122	125	170	152	155	159	2.9%
Campground	30	30	30	32	33	36	30	39	51	54	6.1%
Day Travel	129	135	144	150	158	165	63	89	127	130	2.5%
Total	965	1,035	1,162	1,274	1,315	1,397	1,057	1,159	1,321	1,336	1.2%
Visitor Spending by Commodity Purchased (\$Millions)											
Accommodations	223	251	297	334	337	362	360	398	464	450	-2.9%
Food Service	284	312	357	388	398	423	303	302	339	361	6.3%
Food Stores	40	43	45	46	46	48	36	61	69	73	5.6%
Arts, Ent. & Rec.	181	193	214	226	227	235	174	182	190	199	4.8%
Retail Sales	119	124	139	156	167	182	113	127	141	141	0.2%
Local Tran. & Gas	118	112	110	124	139	146	70	88	118	112	-4.9%
Total	965	1,035	1,162	1,274	1,315	1,397	1,057	1,159	1,321	1,336	1.2%

Placer / Impacts, Summary

Direct Travel Impacts, 2014-2023p

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	% Chg. 22-23
Direct Travel-Generated Earnings (\$Millions)											
Accom. & Food Serv.	183	197	244	272	285	310	261	149	383	429	11.9%
Arts, Ent. & Rec.	93	94	96	112	117	124	102	76	182	218	20.0%
Retail**	22	24	27	29	31	32	36	19	41	42	3.0%
Ground Trans.	10	11	14	16	23	25	11	11	11	12	2.1%
Other Travel*	4	4	6	9	9	11	8	7	10	12	18.0%
Total	312	331	387	439	465	502	419	263	627	712	13.6%
Direct Travel-Generated Employment (Jobs)											
Accom. & Food Serv.	6,280	6,440	7,340	7,880	7,970	8,230	6,660	7,400	8,350	8,690	4.0%
Arts, Ent. & Rec.	3,880	3,820	4,340	4,910	4,960	4,800	3,590	4,510	5,880	6,490	10.4%
Retail**	680	710	790	830	840	850	920	930	870	860	-0.1%
Ground Trans.	280	290	330	350	450	500	530	520	620	660	6.0%
Other Travel*	100	120	160	210	220	240	200	250	240	260	9.7%
Total	11,210	11,380	12,950	14,180	14,440	14,610	11,900	13,610	15,950	16,960	6.3%

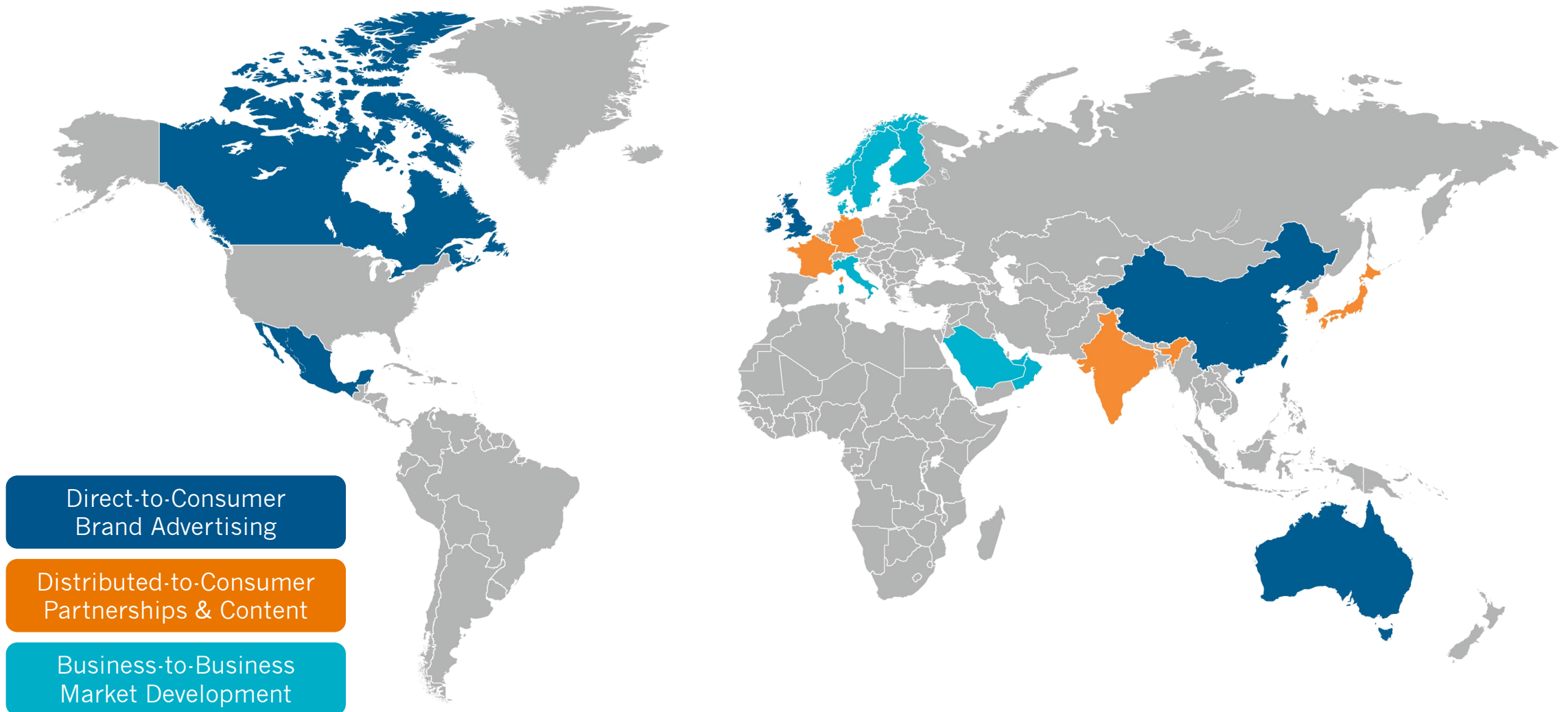


Driving Global Demand for California



**\$25.1 billion
incremental spend**

Priority international markets



FY24/25 Global Paid Media Plan

MARKET	CAMPAIGNS RUNNING	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	INVESTMENT	IMPRESSIONS	
Domestic U.S.	Let's Play, Childhood Rules, Road Trips, Meet What's Possible (PME), Crisis Recovery (LA Fires)				OTV, Digital, Social					Linear TV, OTT/CTV, OTV, Digital, Social, DOOH				\$43,908,900	1,931,814,737	
		Dynamic Foundational, SEM, Leverage Media Base, Co-op Matching Funds, PCD														
Mexico	Let's Play, Childhood Rules, Road Trips	Dynamic Foundational, SEM, Leveraged Media Base, Co-op Matching Funds												\$2,225,000	245,074,219	
Canada	Let's Play, Childhood Rules, Road Trips				Local Market Plan: CTV/OTV, Digital, Social, Cinema, OOH									\$3,900,000	355,828,637	
		Dynamic Foundational Layer: Digital, Social, CTV, SEM, Leveraged Media Base, Co-op Matching Funds														
U.K.	Let's Play, Childhood Rules, Road Trips	Dynamic Foundational, SEM, Leveraged Media Base, Co-op Matching Funds												\$2,000,000	185,001,864	
Australia	Let's Play, Childhood Rules, Road Trips	Dynamic Foundational, SEM, Leveraged Media Base, Co-op Matching Funds												\$2,000,000	166,116,540	
China	Let's Play, Road Trips			Digital, Social, OOH, Cinema, OTT			OTAs					Digital, Social, OOH, Cinema, OTT, OTV			\$6,120,000	584,641,690

\$60.2 Million 3.5 Billion

California Brand Evolution



Find Yourself Here

California Lifestyle



Dream Big

Promise of possibility, living life to fullest, Dream Big



Dream Big 2.0

Since 2017, leaning more toward celebrating diversity and inclusiveness

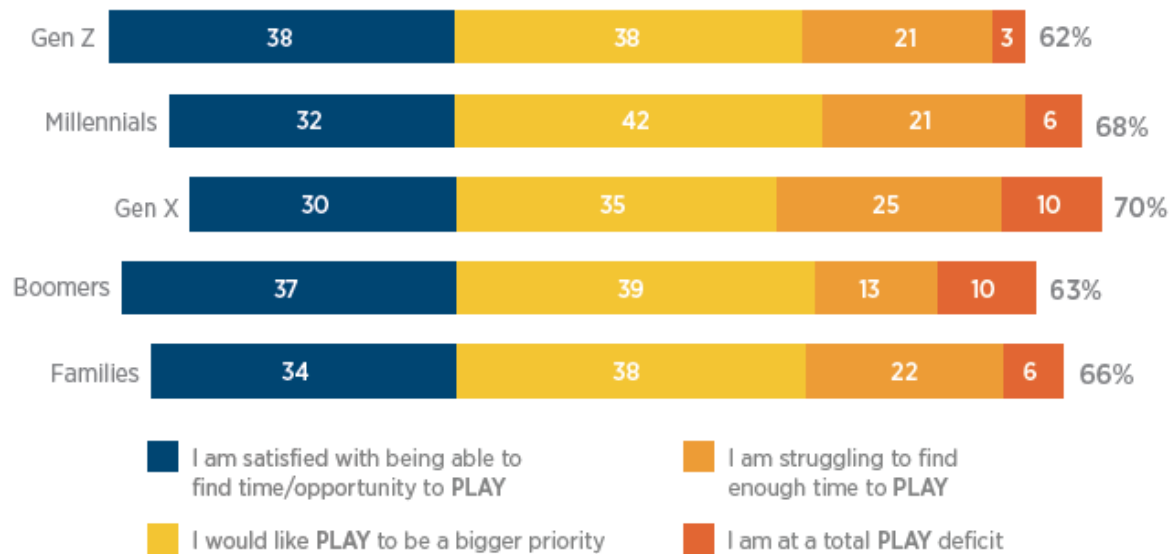


The Ultimate Playground

2024

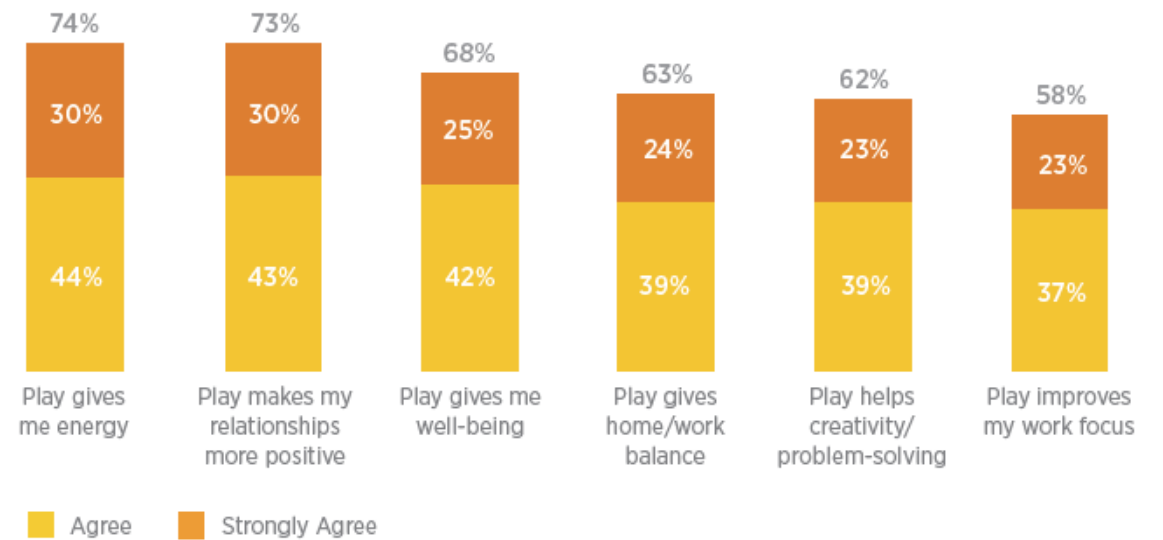
Visit California research highlighted the importance of play in our everyday lives

How would you rate the level of PLAY in your life right now?



Source: SMARInsights, Global Strategic Research Study (October 2023)

How much do you agree with these statements about play?



Source: SMARInsights, Global Strategic Research Study (October 2023)

People are feeling depleted, detached, and uneasy

People seem to have less time for one another these days

85%

I am anxious about the state of the planet

71%

Technology makes us more detached from the real world

67%

I feel tired and burned out all the time

46%

I just want to feel something, to feel alive

77%

I feel there is something missing from my life

61%

I feel like life is less exciting than it used to be

58%

Consumers are yearning for...

I actively seek out experiences that bring me joy and happiness

83%

Awe-inspiring experiences make me feel more connected to the world

78%

When something is magical, it allows me to escape from the mundane

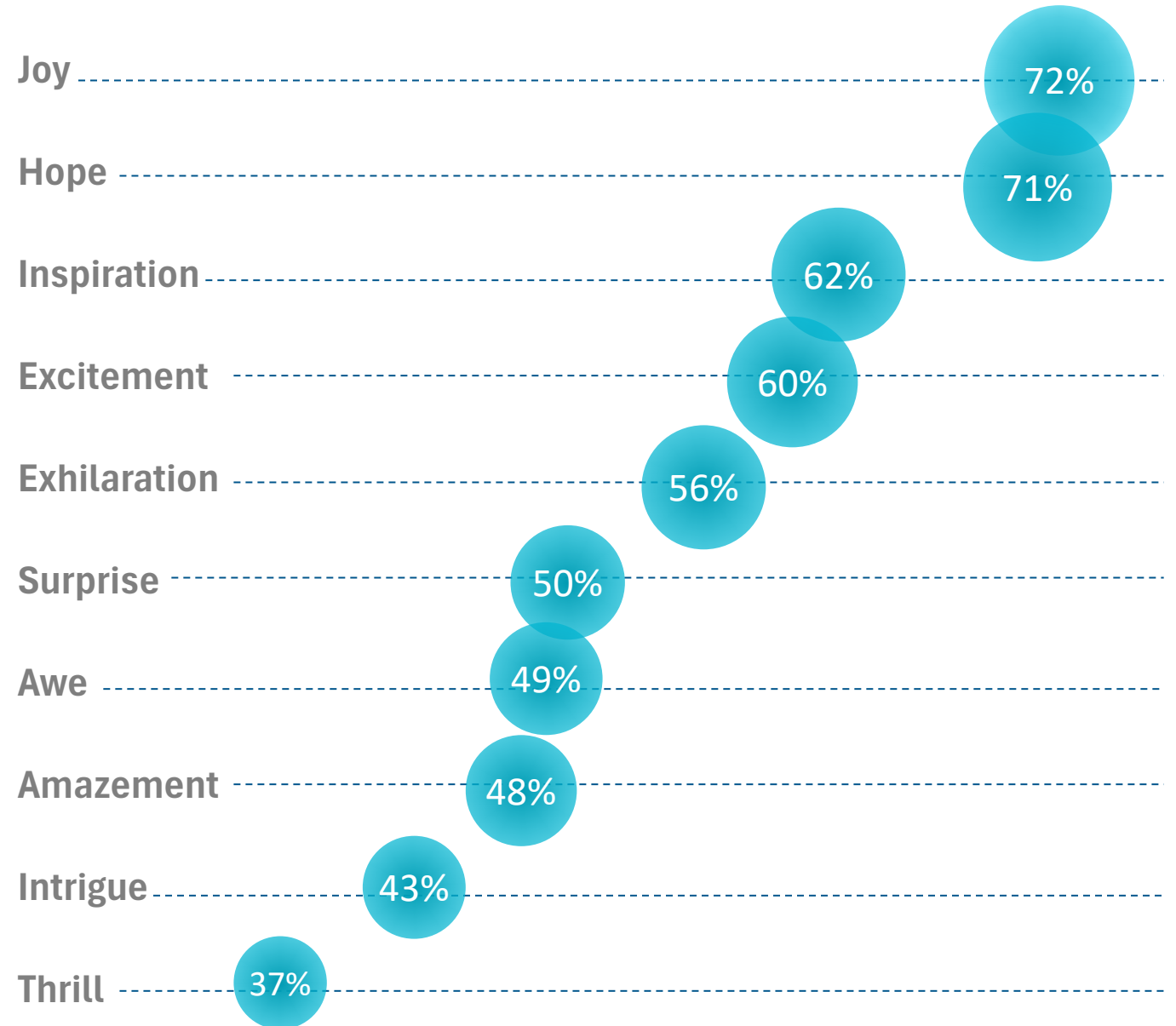
73%

I prefer to spend time in places that spark my imagination

68%

And are seeking more emotion in their lives...

People want more emotion in their lives (% agree)



California

**We celebrate
diversity**

**All dreams are welcome
here**

**Our vibe is fun &
free-spirited**

**We encourage you
to be you**

**The power of
possibility lives
here**

**We champion being
open-minded**

California™

CA CULTURE + CA ABUNDANCE =

PLAYFUL/OPEN-MINDED (EMOTIONAL BENEFIT)

VAST/DIVERSE OFFERING (RATIONAL BENEFIT)

THE ULTIMATE PLAYGROUND

(BRAND POSITION)

California inspires travelers to pursue playfulness in their lives.

“A California vacation/holiday encourages me to express my individual form of play...”

The Ultimate Playground

General Brand



Family



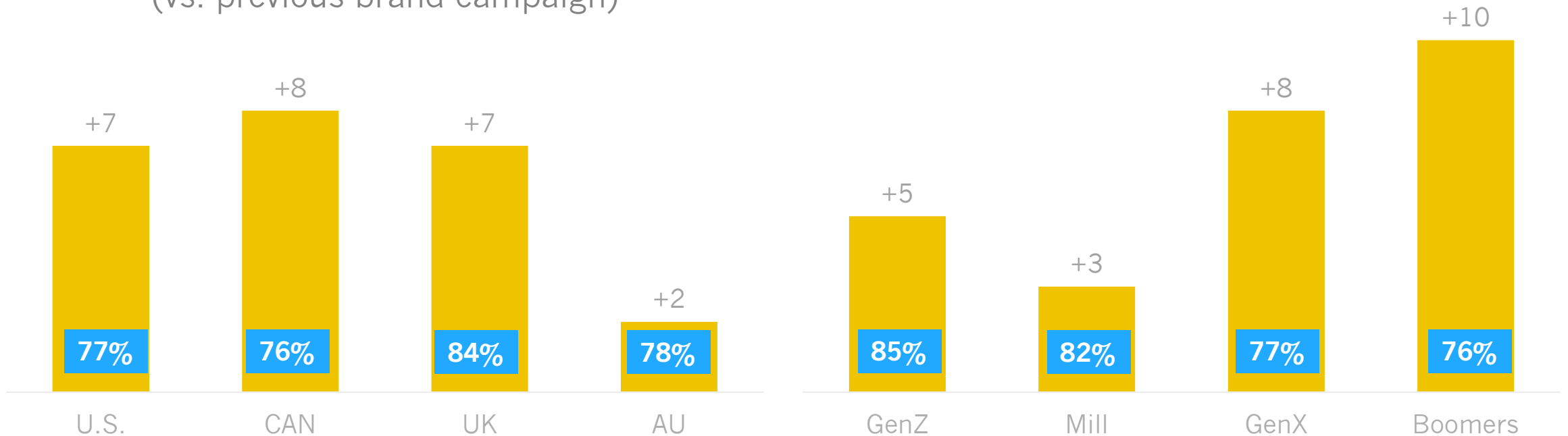
Road trips



Early indicators showed Let's Play was rated higher in every market and every generation

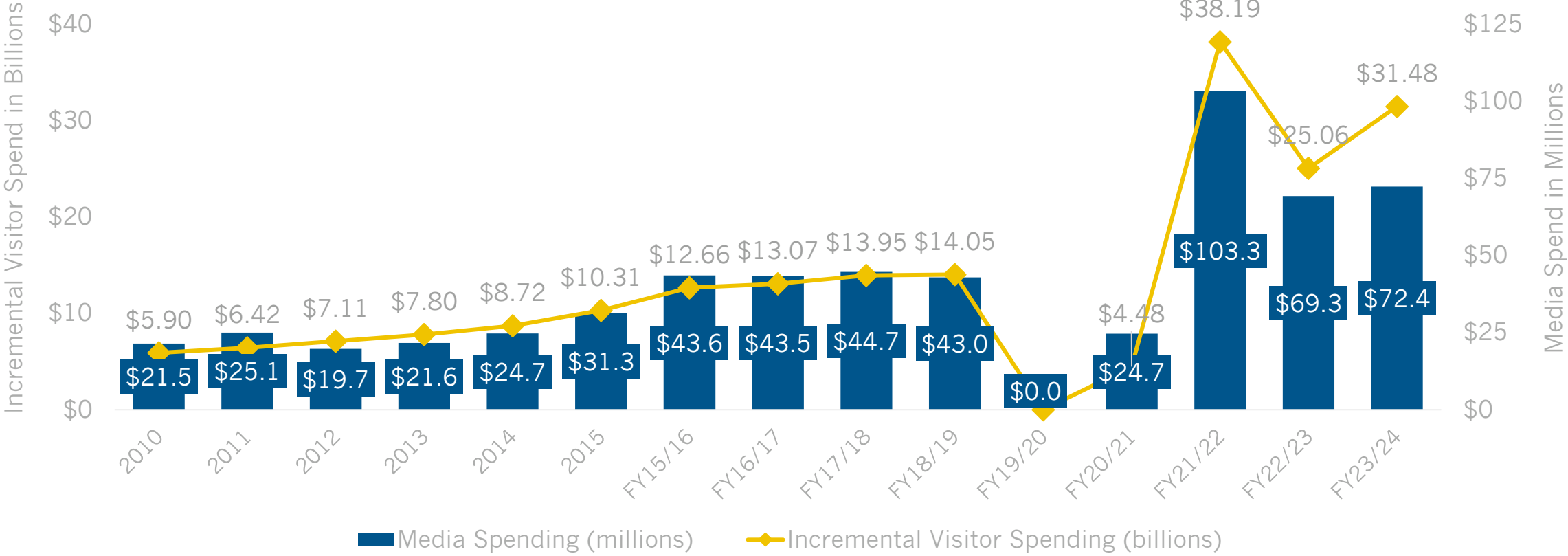
Positive Reaction By Market
(vs. previous brand campaign)

Positive Reaction By Age Segment
(vs. previous brand campaign)



ROAS results validated...it's working

Incremental Visitor Spend (billions)
& Media/Website Investment (millions)



- Source: SMARInsights

'Let's Play'

- FY 24/25 Media plan
 - \$24 Million media buy
 - 1.53 Billion impressions



**LET'S
PLAY★**





'Childhood Rules'

- FY 24/25 Media plan
 - \$12.1 Million media buy
 - 705 Million impressions



CHILDHOOD
RULES







Road Trips Evolution



Road trips continue to resonate

- Highway 49
- Route 66
- Highway 1
- Historic Route 395
- Pacific Coast Highway

Road trips align with the latest travel trends

A sense of nostalgia

Culinary as a taste of place

Localization/
Off the beaten path

Set jetting/
Gig tripping/
Sports

Indigenous peoples

Nature/
Wellness

‘Up Around the Bend’

- March 3 launch
- \$12.6 million investment
- March 3-June 30



**PLAYFUL
JOURNEYS**



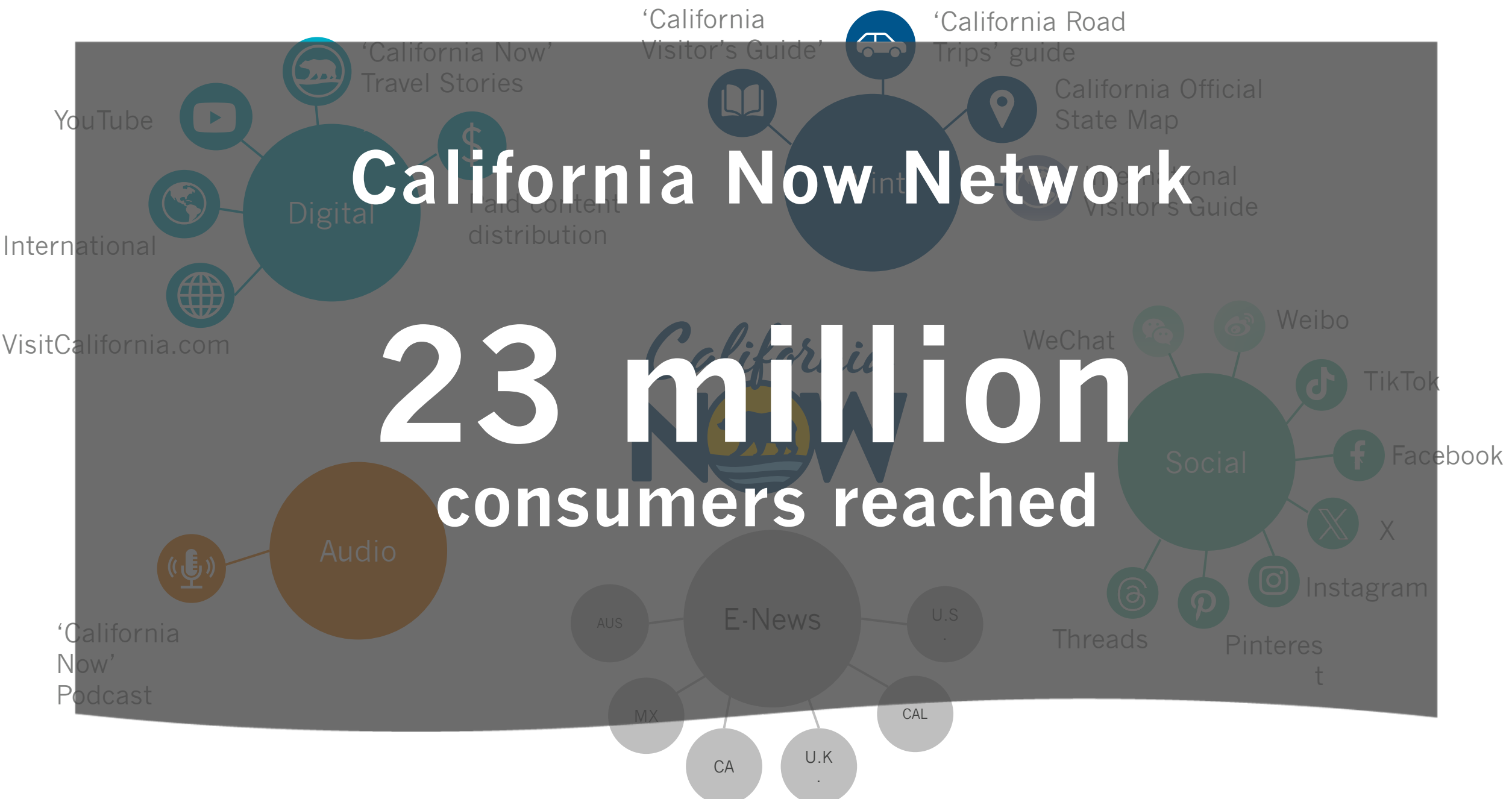
CALIFORNIA
49

scenic
route



California Now Network

23 million
consumers reached





GOLD COUNTRY

Explore the captivating, sun-drenched expanse where California's pioneering spirit was born

Located in Auburn, PaZa Estate Winery is one of 23 boutique wineries on the Placer Wine Trail

Grapes at PaZa are planted in well-draining soil called Andregg, which thrives on rolling hillsides

PaZa's open-air tasting shed features views of the Sutter Buttes, a lava-dome complex active during the Pleistocene

The vineyard grows a selection of varietals, including Albariño, Petite Sirah, and Barbera

The winery is located within the Sierra Foothills AVA, one of California's oldest wine regions

Placer County on VisitCalifornia.com

EXPERIENCES / PLACER COUNTY WINE TRAIL

Placer County Wine Trail

Gold gives way to grapes in the Sierra foothills



Whether you're planning a trip to [Lake Tahoe](#) and want to stop by on your way, or you're set on exploring the [Placer County Wine Trail](#) on its own, this wine region in the Sierra foothills of [Gold Country](#) won't disappoint.

Winemaking is deeply embedded in the culture here, having first taken root around the same time as gold was discovered in nearby [Coloma](#). Aspiring miners weren't the only ones drawn to the area by the Gold Rush—more than a few winemakers, some of them from Europe, found their way over as well, and a booming wine region was born. (Fun fact: Up until Prohibition, there were more vineyards and wineries in the Sierra foothills than in Napa and Sonoma combined.)

April 5: American River 50-Mile Endurance Run, Folsom

Enjoy Gold Country scenery along the American River during this 50-mile run from [Folsom](#) to [Auburn](#). The race starts at Folsom Point in the Sierra Nevada foothills, and passes through oak woodlands and meadows, followed by the [Pioneer Express Trail](#), a path once used by gold prospectors. If 50 miles sounds too daunting, you can do the 25- or 10-mile runs that follow portions of the full course.

Come back April 25–26 for the [Live Performing Arts Academy Jazz Festival](#), when jazz ensembles will play on outdoor stages in the Folsom Historic District.

Play in the snow, Lake Tahoe

You can ski or snowboard well into spring (and even summer) at many [Lake Tahoe](#) ski resorts, as seen in the commercial. At both [Heavenly](#) and [Homewood](#), you get amazing views of the 99.99 percent pure lake right from the slopes, and you'll enjoy Olympic-caliber runs at [Northstar California](#), [Kirkwood Mountain Resort](#), and [Palisades Tahoe](#). If you love cross-country, explore the 100 groomed trails at [Royal Gorge](#), North America's largest cross-country ski resort.

Northern California

Coastal hills and inland valleys in Northern California are primed to put on a colorful show this year. Parks in Sonoma County like [Taylor Mountain Regional Park](#) and [Sonoma Coast State Park](#) should have a kaleidoscope of flowers. Near Sacramento, expect huge swaths of lupines and orange California poppies at [Folsom Lake State Recreation Area](#) and Auburn's [Hidden Falls Regional Park](#). In the San Francisco Bay Area, look for a bonanza of blooms at the Peninsula's [Russian Ridge Open Space Preserve](#) and Marin County's [Point Reyes National Seashore](#).

Canvassing California History

Start: Sacramento End: Williams 6–8 Days, 10 Stops, 640 Miles

Step into the Gold Rush era in Sacramento and surrounding foothill towns, then visit Northern California's volcanic marvels and surprising cities.

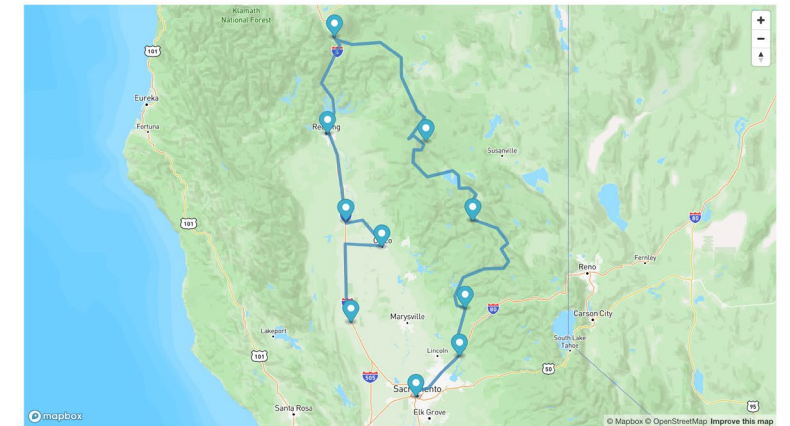
Food & Drink Arts & Culture Family Fun

Created by California Travel Experts

Open Google Maps Download the Itinerary Customize Road Trip



Trip Itinerary Overview



10 stops on this route



Stop 1
Sacramento
1011 St, Sacramento

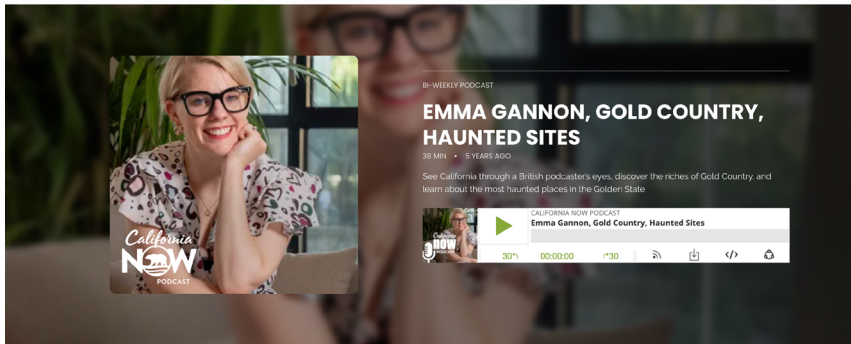


Stop 2
Auburn
101 Maple St, Auburn



Stop 3
Nevada City
230 Broad St, Nevada City

Placer County in podcast



BI-WEEKLY PODCAST
EMMA GANNON, GOLD COUNTRY, HAUNTED SITES
38 MIN • 5 YEARS AGO

See California through a British podcaster's eyes, discover the riches of Gold Country, and learn about the most haunted places in the Golden State.

CALIFORNIA NOW PODCAST
Emma Gannon, Gold Country, Haunted Sites

Podcasts Emma Gannon, Gold Country, Haunted Sites

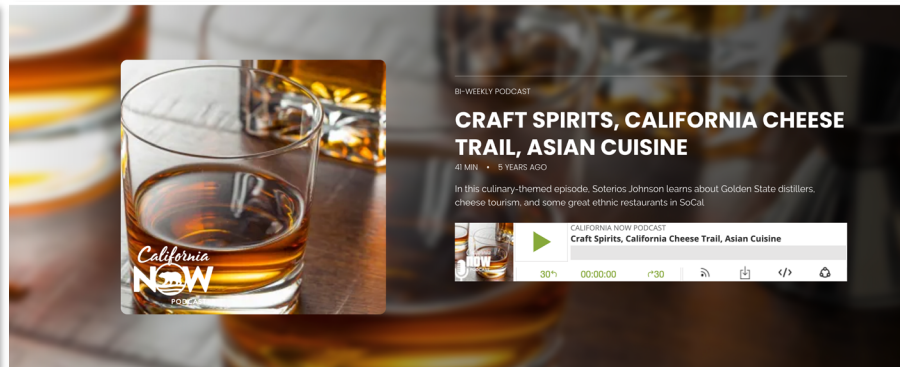
[National Parks](#) [Food & Drink](#) [Wine](#) [Arts & Culture](#) [Architecture](#) [State Parks](#)

Millennials enjoy a spontaneous adventure—which makes California a particularly great fit for *Crit All Delete* Podcast host and British author Emma Gannon. Hailed as the “spokesperson for the internet generation,” Gannon is a big fan of jumping in a car and exploring the Golden State. On this episode of *California Now*, she regales host Soterios Johnson with tales of her latest road trip down Highway One from San Francisco to Huntington Beach.

Johnson is next joined by travel blogger Jessica Wright, who struck the motherlode of road trips when she decided to explore Gold Country by car. From the farm-to-fork capital Sacramento to the heart of the state’s “golden” history in Coloma to the vineyards of Amador County, Wright shares with Johnson some of the hidden gems she unearthed in the region.

The episode also features a conversation with author Richard Senate, whose combined love of ghost-hunting and the state of California makes him a bona fide expert on all the haunted haunts in the state. He gives Johnson a few recommendations for those bold travelers who are seeking a little scare.

SUBSCRIBE



BI-WEEKLY PODCAST
CRAFT SPIRITS, CALIFORNIA CHEESE TRAIL, ASIAN CUISINE
41 MIN • 5 YEARS AGO

In this culinary-themed episode, Soterios Johnson learns about Golden State distillers, cheese tourism, and some great ethnic restaurants in SoCal.

CALIFORNIA NOW PODCAST
Craft Spirits, California Cheese Trail, Asian Cuisine


Podcasts Craft Spirits, California Cheese Trail, Asian Cuisine

[Food & Drink](#) [Estate/Vineyard](#)

California distillers have become pretty crafty with their spirits in the last few years. With award-winning distilleries now dotting the state, you’re likely to have the chance to try a sip wherever you go. On this episode of the *California Now* Podcast, host Soterios Johnson talks to Ryan Friesen, head distiller at the Blinking Owl distillery in Santa Ana. Friesen is also the vice president of the California Distiller’s Guild and has no shortage of recommendations for the adventurous imbibers.

Johnson is next joined by California Cheese Trail founder Vivien Straus. This self-described “cheese girl” grew up on the West Coast’s first organic dairy farm, and has a lot to say about the sights, smells, tastes, and sounds of a California creamery. Finally, Johnson chats with Lucas Kwan Peterson, host of the *Los Angeles Times*’ new video series, *Off Menu*, which chronicles his culinary explorations of Southern California—particularly the rich Asian culinary scene he discovered there.

SUBSCRIBE



BI-WEEKLY PODCAST
SET-JETTING IN CALIFORNIA
31 MIN • 2 MONTHS AGO

Hop on this travel trend and discover how to experience the Golden State’s famous film sites for yourself.

CALIFORNIA NOW PODCAST
Set-Jetting in California

Podcasts Set-Jetting in California

[National Parks](#) [South Valley Regional Parks](#) [Cinema](#) [Outdoor Adventure](#) [Business](#) [Entertainment](#)

On this episode of the *California Now* Podcast, host Soterios Johnson takes listeners on a set-jetting tour of California, exploring the state’s notable TV and film locations with three knowledgeable experts.

First up, Johnson chats with Bryan Rice, owner of San Francisco Movie Tours, who reveals how the city’s unique landscapes have played host to countless classic films. Rice takes Johnson through some of San Francisco’s most famous movie spots, including the Golden Gate Bridge and the Palace of Fine Arts. “We go to all the major neighborhoods of San Francisco, and as we go by these locations we’re showing 70 clips from 55 movies filmed all over [the city],” says Rice. He also dives into the local filming locations of *Mrs. Doubtfire* and Hitchcock’s thriller *Vertigo*, offering a behind-the-scenes look at what makes San Francisco a film-fan favorite.

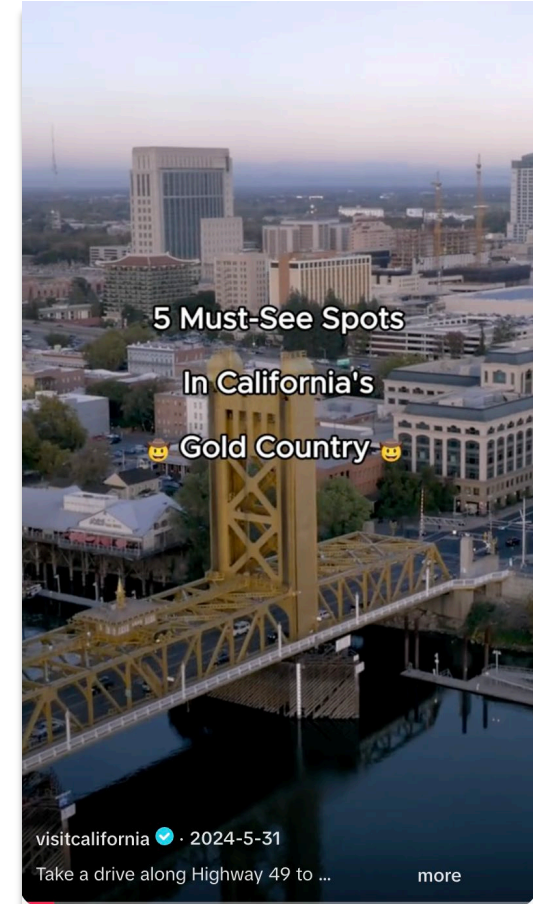
Next, Johnson is joined by Samantha Gonzalez, PR and social media representative for the Warner Bros. Studio Tour Hollywood. For fans of *Friends*, *Glenn Glens*, *The Big Bang Theory*, and many other TV shows and films, it’s a multi-stop attraction that showcases actual sets, props, costumes, and more. Celebrity spotting is also a distinct possibility. “This is where plenty of actors, directors, and writers work,” Gonzalez notes, “so it is very common to just be riding on a tour cart and suddenly you see an actor from *Ted Lasso* pass by.”

Finally, Johnson connects with Charlie Horvack, cofounder of the *Setletters* app, which helps film lovers track down the real-world locations from their favorite movies and TV shows. Horvack talks about the growing trend of set-jetting, especially across California’s diverse landscapes. “I moved out to California for my acting and film career, and when I finally got settled and was able to venture out into the state, it made me realize everything’s not just done in Hollywood,” says Horvack. He also shares practical tips for navigating these filming locations and how to use the app to better plan your own cinematic itinerary.

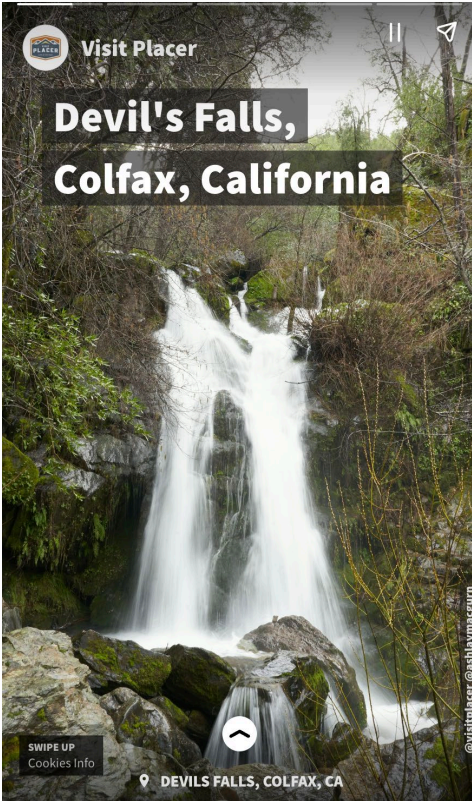
SUBSCRIBE



Placer County in social media



Travel Stories





Resources Available to You

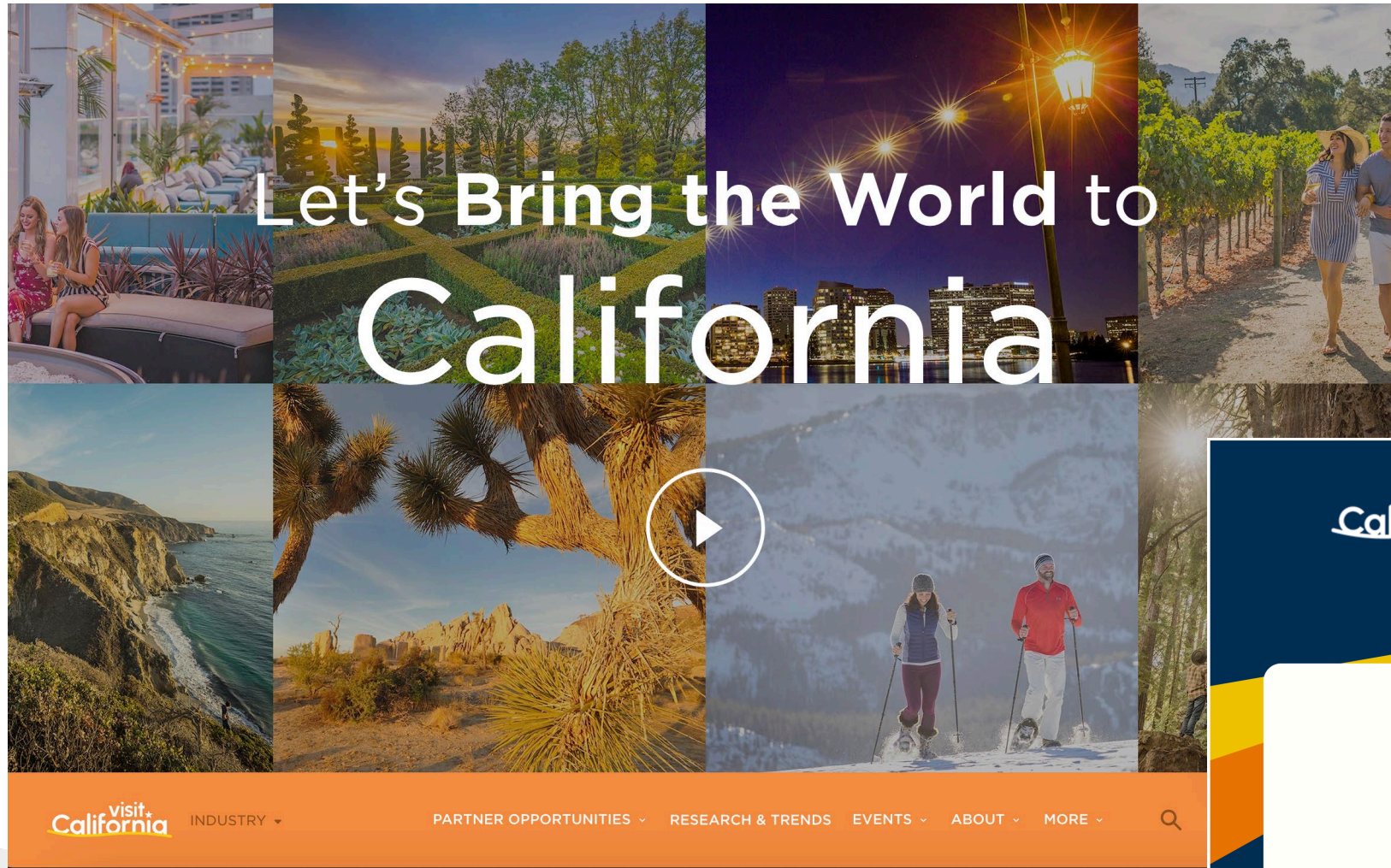
industry.VisitCalifornia.com

California Welcome Center - Auburn

- Welcomed over 6,300 travelers in 2024



Stay Up to Date on the Latest News



visit California

LA

FROM THE CEO

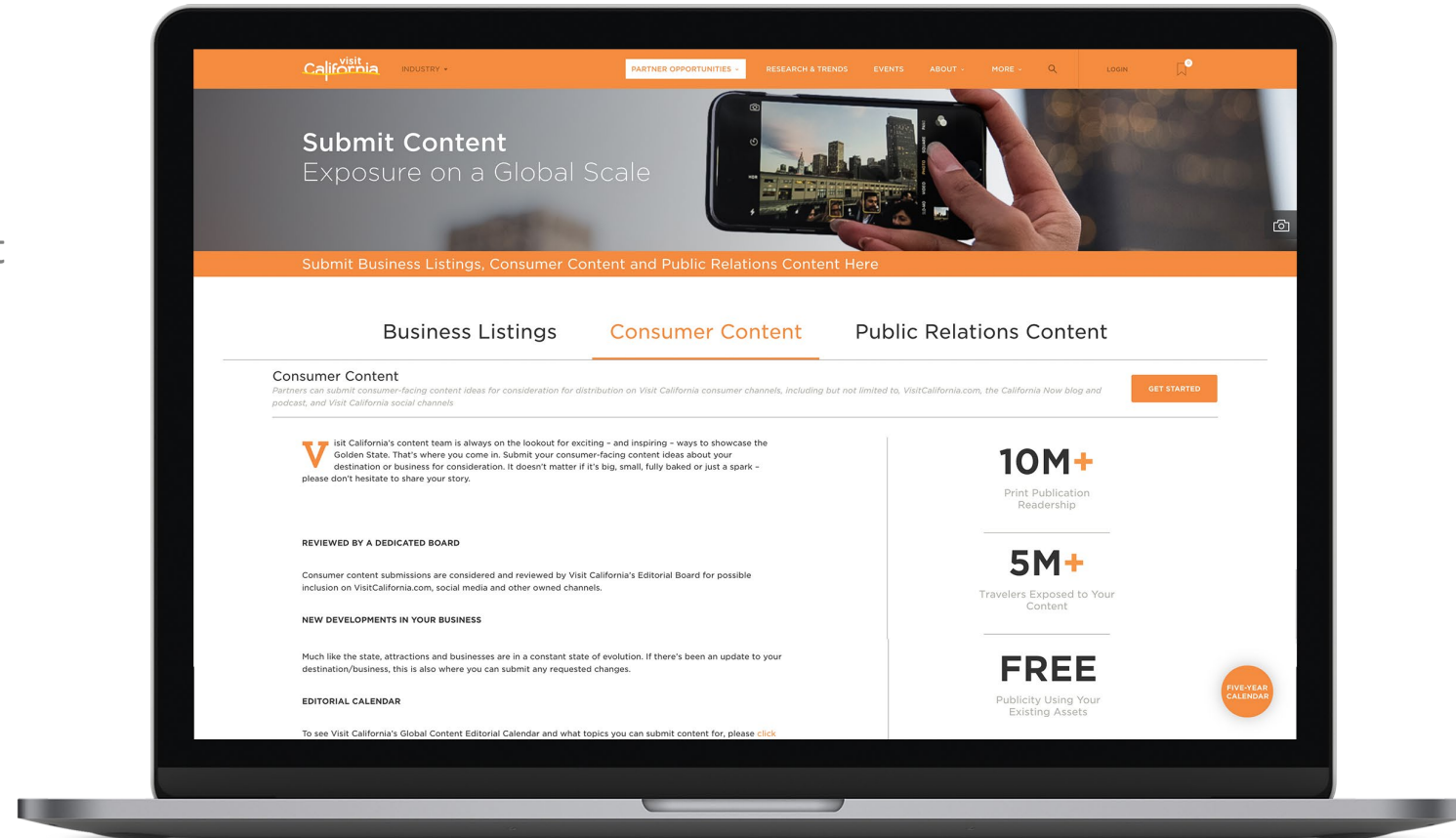
Dear Industry Partners,

This week, a visit to Los Angeles allowed Visit California to witness the impact of the wildfires as well as the remarkable strength and resilience of

Submit Story Ideas and Content

Industry.VisitCalifornia.com/SubmitContent

- Submit content
- View editorial calendars
- Review research
- Access marketing plans



Stay in Touch



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Thank you!