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## Public Comment for SEED meeting 5-21-26


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**From** Lexi Boeger <lexi@ouregg.org>

**Date** Wed 5/20/2026 3:59 PM

**To** BOS-Clerk of the Board <edc.cob@edcgov.us>; Planning Department <planning@edcgov.us>

**Cc** Ribaldo Carl <carl@smgonline.net>; Dspaur <davidspaur@comcast.net>; Heinsen Les <les@element79vineyards.com>; Karen L. Garner <Karen.L.Garner@edcgov.us>

 1 attachment (2 MB)

EDC\_Tourism\_Comparison.pdf;

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### This Message Is From an External Sender

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Report Suspicious

Dear Clerk, Please see the attached document for Open Forum public comment at the 5-21-26 SEED meeting.

Dear SEED Committee members and Director Garner,

Thank you for your continued work on El Dorado County's local tourism economic issues. We look forward to the Civitas presentation and the other items on Thursday's agenda. Our special report, attached here, relates to several topics you are covering. We hope it will add to the discussion. The fundamental impetus for our special report was to investigate the notion that tourism foot traffic, visitation and overnight stays (TOT) are down due to regional, statewide or macro reasons beyond our influence. After some research and a comparison of our neighboring county's tourism numbers that does not seem to be the case. The good news is that we may be able to take actions here at home to move the needle- many of which your committee is actively working on. Thank you for that good work!

Best,  
Lexi

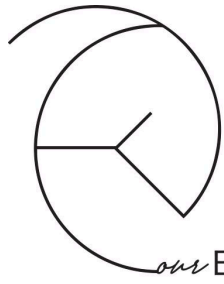
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**Lexi Boeger**

Co-founder [Our EGG](#)

Economic Generator and Germination for El Dorado

People-Powered and Rurally Rooted



# EL DORADO ECONOMIC **Generator & Germination**

## **Comparative Regional Analysis: Aligning El Dorado County Tourism Trends and Lodging Revenues for Long-Term Fiscal Resilience**

*A Special Economic Briefing by the El Dorado Economic Generator & Germination Fund*  
**Published:** May 20th, 2026

### **EXECUTIVE SUMMARY**

Recent contractions in Transient Occupancy Tax (TOT) revenues require careful evaluation, and a close review of comparative regional data provides a clear, nuanced perspective on our current trajectory.

A comprehensive evaluation of statewide travel patterns, paired with a direct fiscal comparison of immediate neighbors—Placer, Nevada, and Amador counties—reveals that El Dorado County's revenue trajectory has diverged from the surrounding region. While neighboring areas report record visitor spending, stable lodging tax baselines, or projected incremental growth, El Dorado County faces more pronounced, multi-year contractions in discretionary TOT.

This briefing analyzes the structural factors driving these differing regional trends, reviews shifting consumer preferences toward specialized visitor experiences, and explores collaborative opportunities to build long-term fiscal resilience.



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**About the El Dorado Economic Generator & Germination Fund (Our EGG):** Our EGG is an innovation engine for community and economic development, founded in 2025 to *GERMINATE* and *GENERATE* a resilient local economy that uplifts people and keeps our land thriving in El Dorado County.

## 1. THE FOUNDATION: EL DORADO COUNTY'S TOURISM ECONOMY

Tourism and hospitality represent a foundational cornerstone of El Dorado County's economic framework, driving employment, business vitality, and critical public services.

- **Job Creation:** According to the *California Travel Impacts* report (released May 2026 by Visit California and prepared by Dean Runyan Associates), travel-related spending directly supports **over 9,000 local jobs**, accounting for approximately **17% of all employment** countywide. Furthermore, an El Dorado Water Agency valuation study indicates that outdoor recreation in the upper American River watershed alone supports wages for **2,500 jobs**.
- **Economic Impact:** Total travel-related **spending in the county reached \$1.1 billion**, representing approximately **17% of total taxable sales** (*California Travel Impacts*, Dean Runyan Associates, May 2026).
- **Tax Revenue Generation: Tax Revenue Generation & Fiscal Trends:** Tourism directly funds county operations through the Transient Occupancy Tax (TOT). While the county's total Discretionary TOT (DTOT) budget allocation baseline reached **\$14.6 million** for the 2024–25 fiscal year, official ledgers show that actual, newly generated annual revenue from overnight stays was **\$8.75 million**, with the remaining balance composed of multi-year pandemic-era carryover cushions. Following successive contractions and a **3.4% year-over-year decline** in actual receipts, the baseline for new annual discretionary generation has normalized to **\$8.5 million** for the current cycle. These true single-year revenues flow directly into the county's general fund to support road maintenance, public safety, law enforcement, and wildfire mitigation.

## 2. THE STATEWIDE CONTEXT & THE EXPERIENTIAL TRAVEL SHIFT

Data from the *Economic Impact of Travel in California* report (released May 2026 by Visit California and prepared by Dean Runyan Associates) indicates that statewide travel spending has not experienced a downward trend, but rather a significant structural rebalancing toward specific high-yield niches:

- **Record Top-Line Spending:** Total travel spending across California reached a record **\$158.9 billion** in 2025, up **1.7%** from \$156.2 billion in 2024.

- **The Experience and Accommodations Surge:** Visitors staying overnight in hotels, motels, and short-term rentals spent a combined **\$83 billion** statewide in 2025—a **2.7% increase** year-over-year. Correspondingly, visitor spending on food services climbed to **\$38.5 billion** (a **4.6% increase**), and arts, entertainment, and recreation spending reached **\$17.4 billion**.
- **Shifting Consumer Intentions:** Major national travel studies mirror this shift toward purposeful, high-yield niches. Editorial forecasts from Condé Nast Traveler highlight that modern travelers are actively building itineraries around "experiential travel," seeking out unique cultural connections, historical properties, and immersive activities. Similarly, comprehensive market insights from Hilton and Expedia Group reveal that a significant majority of consumers are planning travel around specific "emotional intentions"—such as deep renewal, wellness, and connection—prioritizing immersive, slow-travel properties over traditional, activity-dense vacations.
- **The Rise of Wellness & Nature Tourism:** Consumer sentiment has evolved beyond passive sightseeing. Today's high-yield traveler views **nature as a canvas for personal wellness**. Travelers are actively seeking out "forest bathing," agricultural immersion, dark-sky viewing, and mindful disconnection. Economic data demonstrates that visitors looking for therapeutic, land-based experiences stay longer and spend significantly more per day than the average tourist.
- **The Power of Consumer "Pairings":** Modern traveler trends show that economic growth is heavily concentrated in destinations that seamlessly pair overnight accommodations with hands-on, experiential tourism—specifically agritourism, culinary experiences, localized farm stays, and wellness-focused outdoor retreats.
- **The Day-Tripper Dynamic:** *Regions relying heavily on high volumes of un-paired day-trippers absorb infrastructure, road maintenance, and emergency service demands without fully capturing the higher-margin overnight lodging premiums that fund the general fund.*

### 3. THE REGIONAL MATRIX: DATA-BACKED TRAJECTORIES

Lodging tax performance varies significantly across county lines, showing that El Dorado's current contraction is localized rather than regional:

County	TOT / Visitor Revenue Trajectory	Market Dynamics & Policy Context
Placer County	<b>Record Growth (+4.1% to +5.6%)</b>	Unified TOT-TBID framework; predictable short-term rental caps that stabilized premium inventory.
Amador County	<b>Steady, Incremental Growth (+2.0%)</b>	Consistent, predictable foothill agritourism and wine-country baseline; insulated from alpine weather shocks.
Nevada County	<b>Stabilized Leveling (Beating Baselines)</b>	12% base TOT matched with voter-approved dedicated measures; active use of TTbIDs to protect mountain revenues.
El Dorado County	<b>Absolute Decline (-3.4%)</b>	Multi-year revenue contractions as post-pandemic travel levels out. Regulatory uncertainty from shifting short-term rental (STR) caps and geographic boundaries. High climate vulnerability due to two-thirds of revenue being concentrated in one geographic area (Heavy reliance on Tahoe vs. diversification across the West Slope.)

- **Placer County:** According to the *Placer County Economic Development Division Annual Visitor Spending Report* (April 2026), total visitor spending reached a **record-breaking \$1.57 billion** (+4.1% year-over-year), driving a **5.6% surge** in lodging tax revenue by stabilizing premium overnight options paired with their western slope wine, beer, and recreation corridors.
- **Amador County:** Independent of an alpine ski economy, Amador jurisdictions model a **steady, conservative 2% annual growth rate** for TOT by maintaining a consistent destination framework for their historic corridors and wine regions.
- **Nevada County:** Shares El Dorado's structural West Slope/East Slope layout. To manage the post-pandemic market leveling, Nevada County and the Town of Truckee paired a 12% baseline TOT with a voter-approved 2% measure (Measure K) for workforce housing and wildfire preparation, allowing actual collections to regularly outperform conservative budgetary baselines (*Nevada County / Town of Truckee Annual Financial Reports*).
- **El Dorado County:** The *El Dorado County Adopted Budget* (FY 2025–2026) noted that Discretionary TOT receipts came in **3.4% lower** than the previous year, following a prior cycle where the recommended discretionary TOT budget was adjusted downward by **24%**.

#### 4. UNDERSTANDING LOCAL STRUCTURAL VULNERABILITIES

The data indicates that El Dorado's current fiscal trajectory presents an ideal opportunity to optimize our structural and regulatory design. Three primary areas offer clear pathways to enhance local revenue:

- **I. Short-Term Rental Predictability and Market Dynamics:** While local revenue contractions are occasionally attributed to an overall market decline, national benchmarks show a sector that is stabilizing and growing. According to **AirDNA** and **Key Data** (2026 outlooks), macro trends reflect steady, mature growth: national STR demand is projected to rise **4.1% year-over-year**, Average Daily Rates (ADRs) are up **1.5%**, and a minor **1%** ease in occupancy is simply due to supply growth (+4.6%) distributing bookings across a wider pool. Restoring long-term regulatory predictability gives local operators the confidence to invest in property optimization and market their stays long-term.
- **II. West Slope Overnight Conversion:** The West Slope features exceptional natural assets, historic towns, and vibrant agricultural regions. Expanding and streamlining the permit inventory for diverse, boutique lodging types will allow the county to convert existing high-volume day-trippers into overnight, TOT-paying guests who support local merchants.
- **III. Geographic Revenue Balancing:** Building an independent, weatherproof visitor economy on the West Slope provides a vital fiscal anchor for the county's general fund. Cultivating year-round, land-based tourism corridors balances out alpine climate cycles, protecting public service funding from seasonal winter or wildfire fluctuations in the Lake Tahoe Basin.

#### 5. STRATEGIC PATHWAYS TO LONG-TERM FISCAL RESILIENCE

To bridge the revenue gap and expand our taxable lodging base, El Dorado County can utilize four unified policy mechanisms:

- **A. Streamline and Diversify Rural Lodging Options** Modernize land-use ordinances to support a wider array of small-scale, low-impact overnight options, unlocking immediate economic potential for local landowners. Simplifying paths to include smaller rural parcels in agricultural areas expands our agritourism inventory. Furthermore, because current county code restricts traditional TOT to physical platform structures rather than tents on the ground, the county is missing a massive segment of California's high-yield travel market. By formally opting into California AB 518 (The Low-Impact Camping Areas Act), the county can leverage a ready-made statutory framework for rural parcels of two or more acres. This allows the county to systematically capture alternative revenue streams—via standardized infrastructure, fee assessment districts, and specialized fire mitigation fees—without needing to amend its baseline TOT ordinance, while automating revenue remittance and directly funding local wildfire safety.

- **B. Engage and Support an Industry-Led Stewardship & Data Workgroup** Following the discontinuation of visitors authority funding in 2025, the county should actively support and engage with local stakeholders to establish a robust, industry-led destination management workgroup (with potential for future seed funding as viable frameworks emerge). This collaborative body will focus on data-driven destination management, explicitly underscoring stewardship as a core value to ensure travel benefits the entire community. By bringing local economic organizations and industry leaders to the table, the workgroup will leverage existing data and mapping tools to attract high-yield visitors while protecting our rural way of living and ensuring growth never strains localized infrastructure or safety capacity.
- **C. Unify Lodging Workstreams into a Cohesive Strategy** Consolidate siloed efforts—like the Agriculture Lodging Ad Hoc, the VHR Ad Hoc, and Budget Ad Hoc work on lodging—into a single, transparent lodging framework with robust industry engagement. Viewing traditional vacation rentals, boutique hotels, agritourism, and low impact camping as an interconnected web ensures policy cohesion, eliminates regulatory friction, and creates a predictable environment for private investment.
- **D. Partner with Local Groups for Smarter Economic Data** Leverage data insights, robust stakeholder/industry feedback and mapping tools already compiled by local economic development organizations to better inform and support effective frameworks. Collaborative workshops and data-sharing will allow leadership to pinpoint exactly where tourism growth makes the most sense without wasting internal county resources.

## CONCLUSION

The data demonstrates that El Dorado County's current TOT challenges are unique to our local structure rather than an unavoidable regional reality. While our neighbors have successfully insulated their budgets through diversified lodging options, data-backed marketing, and predictable regulatory frameworks, El Dorado County has an untapped opportunity to achieve similar structural stability. By exploring sensible land-use options, updating regulatory predictability, and participating in collaborative, data-sharing partnerships with local organizations, county leadership, staff, and community stakeholders can work together to protect local landscapes, empower rural landowners, and build a stable, high-yield lodging economy for the future.

### Data Sources and References:

- *The Economic Impact of Travel in California (May 2026) and California Travel Impacts by County, prepared by Dean Runyan Associates for Visit California.*
- *Condé Nast Traveler (Global Features/Trends Report), May 2026.*
- *Hilton annual travel intent survey and Expedia Group Traveler Value Index, 2026.*
- *Placer County Economic Development Division Annual Visitor Spending Report (April 2026).*
- *El Dorado County Adopted Budget and Discretionary Revenue Forecasts (FY 2025–2026).*
- *Value of Outdoor Recreation in the Upper American River Watershed Study, El Dorado Water Agency.*
- *Nevada County / Town of Truckee Transient Occupancy Tax & Measure K Annual Financial Reports.*
- *U.S. Short-Term Rental Outlook Report (2026), AirDNA.*
- *Vacation Rental Industry Outlook Report (2026), Key Data Dashboard.*