

# Lake Tahoe Visitors Authority

Visitor Profile Study | Top Line Results | Preliminary  
Summer + Fall 2015



# Notes

- The following is summary top line report of data collected over the summer and fall quarters.
- The data is preliminary and numbers may not foot due to rounding.



# Project Objectives

- ❖ Develop visitor profile data.
- ❖ Analyze the importance of various factors on decisions to visit Lake Tahoe.
- ❖ Analyze how visitors rate various Lake Tahoe offerings.
- ❖ Analyze the effectiveness of LTVA advertising in creating awareness of Tahoe South, influencing travel decisions, and driving traffic to [www.tahoemouth.com](http://www.tahoemouth.com).



# Project Methodology

- Surveys were conducted with Tahoe South visitors between October 15, 2015 and January 10, 2016.
- Locations included the casino hotels, the Heavenly Village, the area between the “Y” and Emerald Bay, Ski Run Marina, and Zephyr Cove Resort.
- Interviews were conducted on both weekends and weekdays.



# Market Overview

A changing landscape

	2004	2010	2015
GDP (% Change)	2.2%	- 2.4%	2.8%
Unemployment % (California)	6.2%	11.4%	5.8%
Unemployment % (United States)	5.5%	9.8%	5.0%
Personal Income Growth (Real)	3.9%	-1.7%	3.9%
Consumer Price Index	2.65	-.4%	0%

## Analyst Notes:

**Tahoe South is experiencing a very different marketplace today. The travel economy in California is very strong compared to the past.**



# Visitor Demographics and Patterns



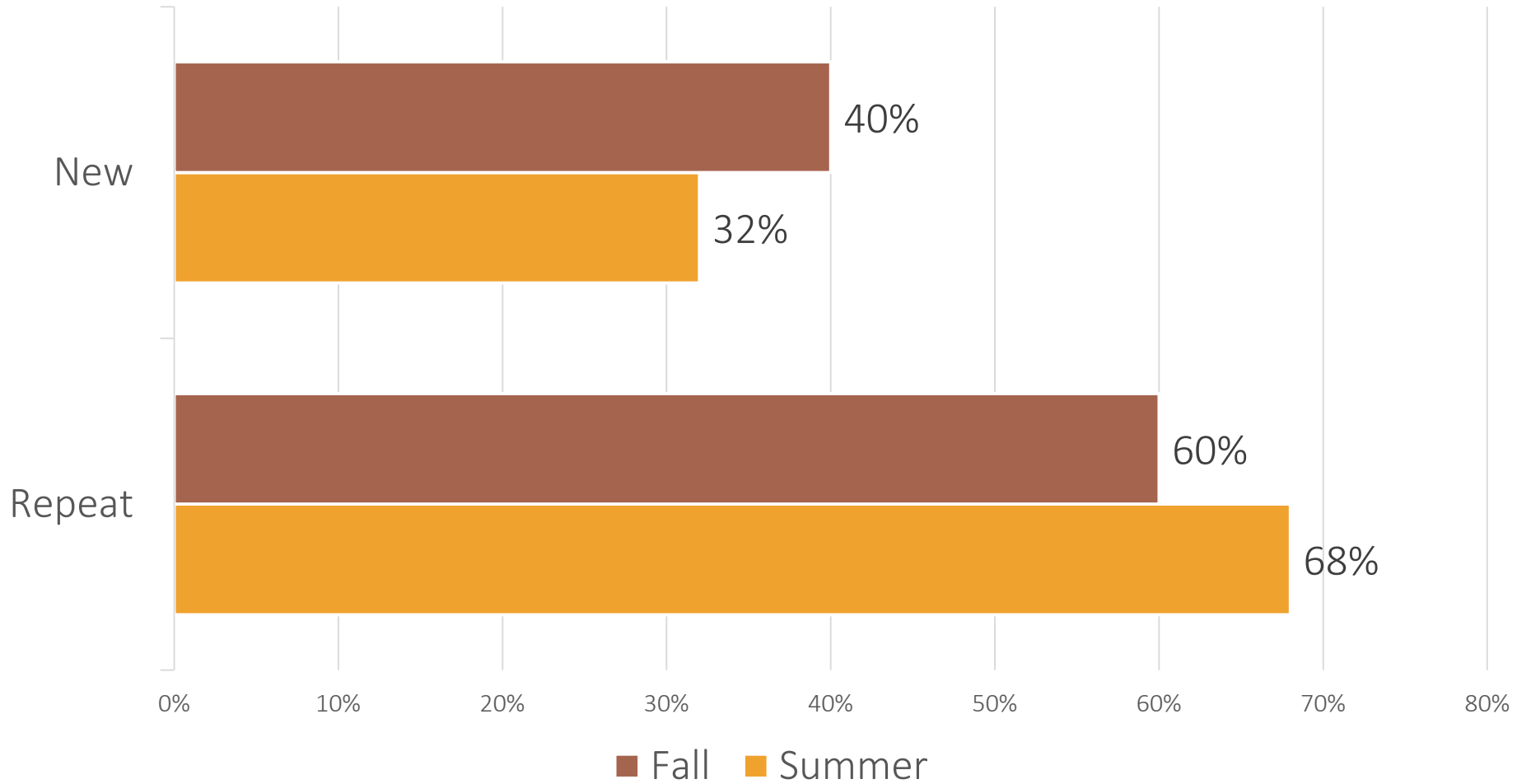
# Demographics

	<i>2015 Summer</i>	<i>2015 Fall</i>		<i>2015 Summer</i>	<i>2015 Fall</i>
<b>Gender</b>			<b>Household income:</b>		
Male	42%	40%	0–\$29,000	3%	3%
Female	58%	60%	\$30,000–39,999	3%	6%
<b>Marital Status:</b>			\$40,000–49,999	12%	13%
Single	20%	20%	\$50,000–59,999	8%	12%
Married	58%	57%	\$60,000–69,999	9%	8%
Living together	21%	22%	\$70,000–99,999	15%	14%
Widowed	1%		\$100,000–149,999	20%	19%
<b>Family Status:</b>			\$150,000–200,000	10%	10%
No children	44%	46%	\$200,000-249,000	11%	9%
Children at home	31%	31%	\$250,000-349,000	2%	2%
Empty nester	25%	23%	\$350,000-499,999	1%	-
<b>Age:</b>			Mean	\$136,000	\$127,000
Mean	42	43	Median	\$100,000	\$88,000
Median	37	38			

**Analyst Notes:**  
**Numbers may not  
 foot due to  
 rounding.**

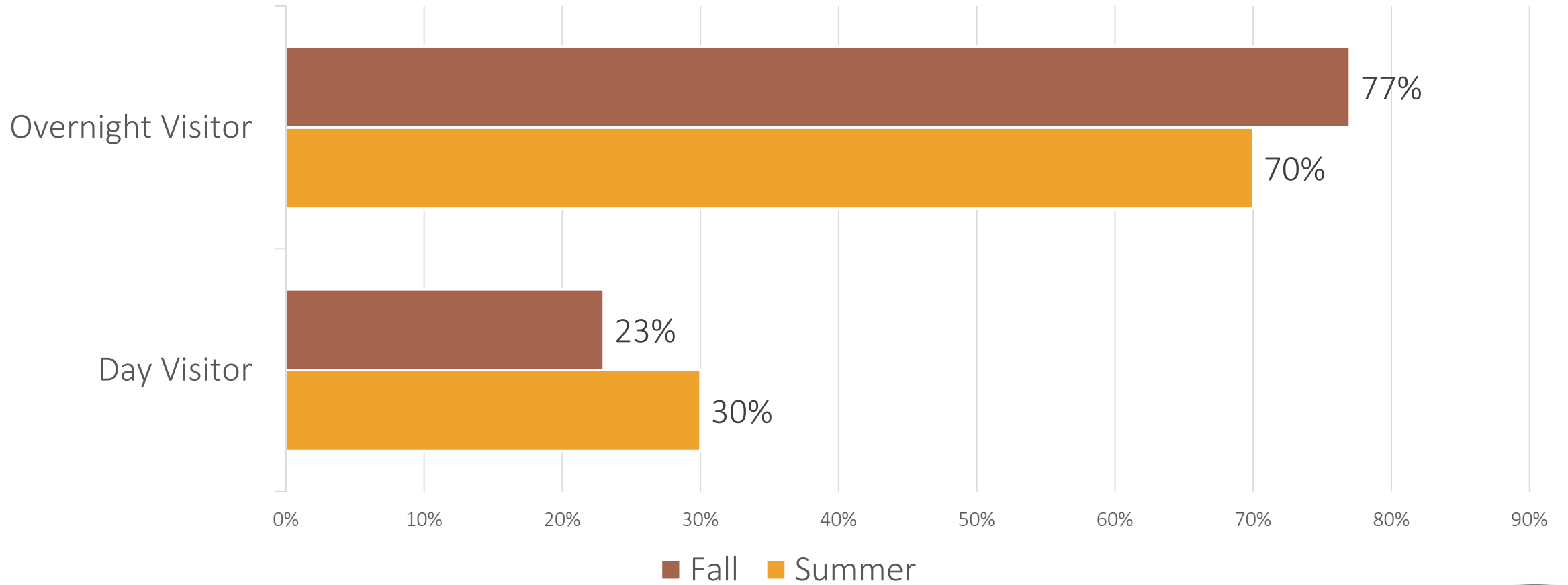


# New vs. Repeat Visitors





# Visitor Mix



# Visitor Patterns

## Summer

Average trip frequency over the past 12 months was 2.9

Average length of stay – 3.2 days

Average party size – 3.0

## Fall

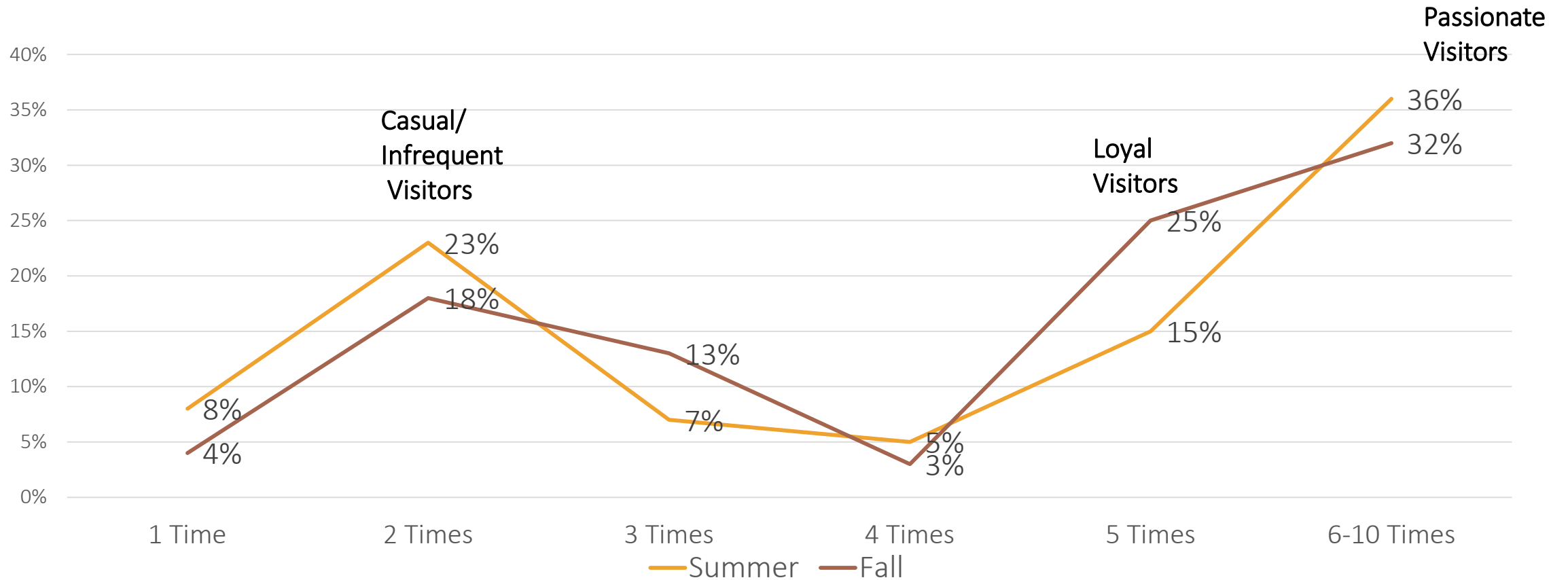
Average trip frequency over the past 12 months was 4.0

Average length of stay – 2.9 days

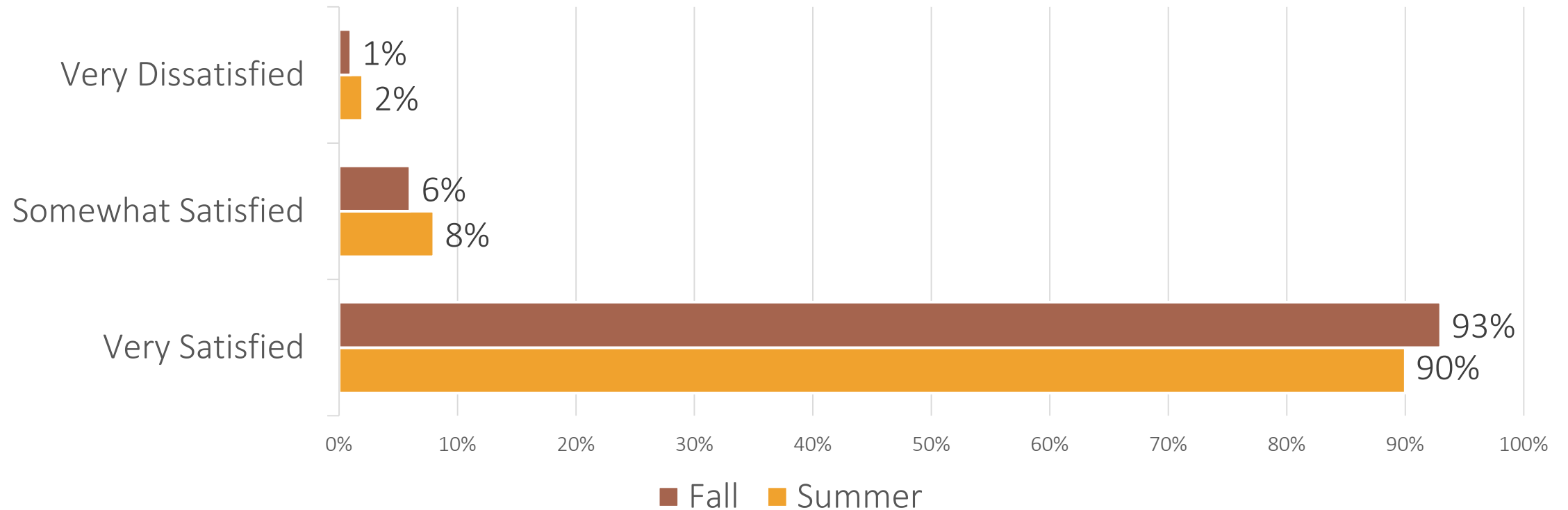
Average party size – 3.2



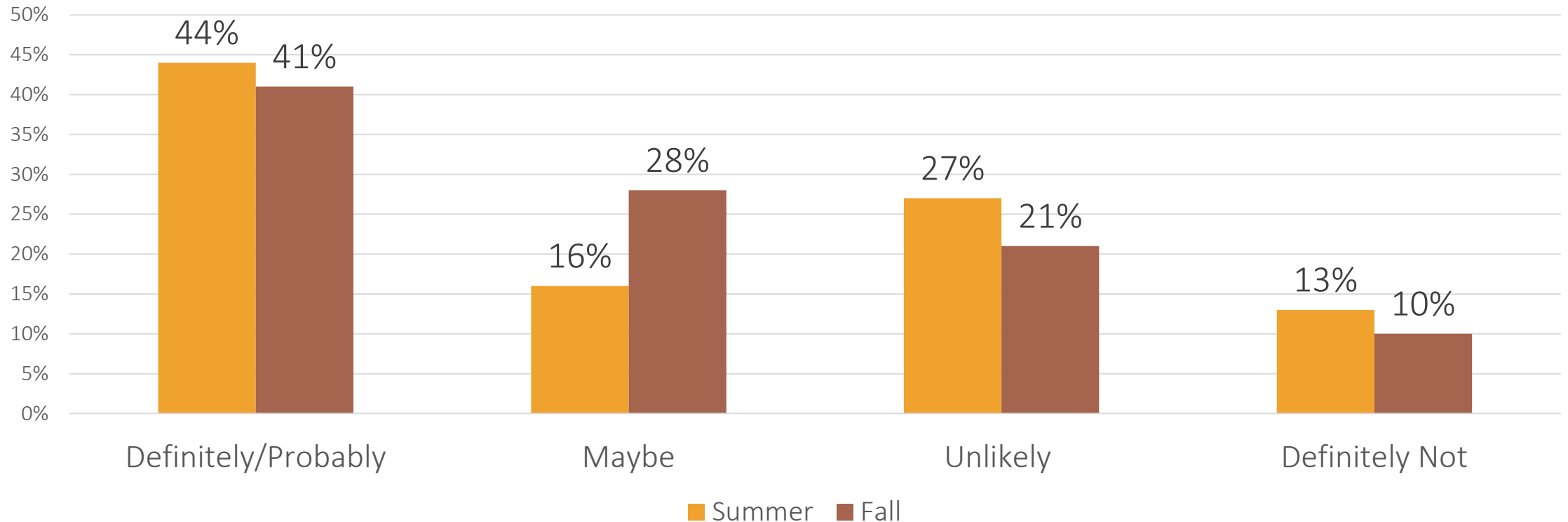
# Trip Frequency – Past 5 Years



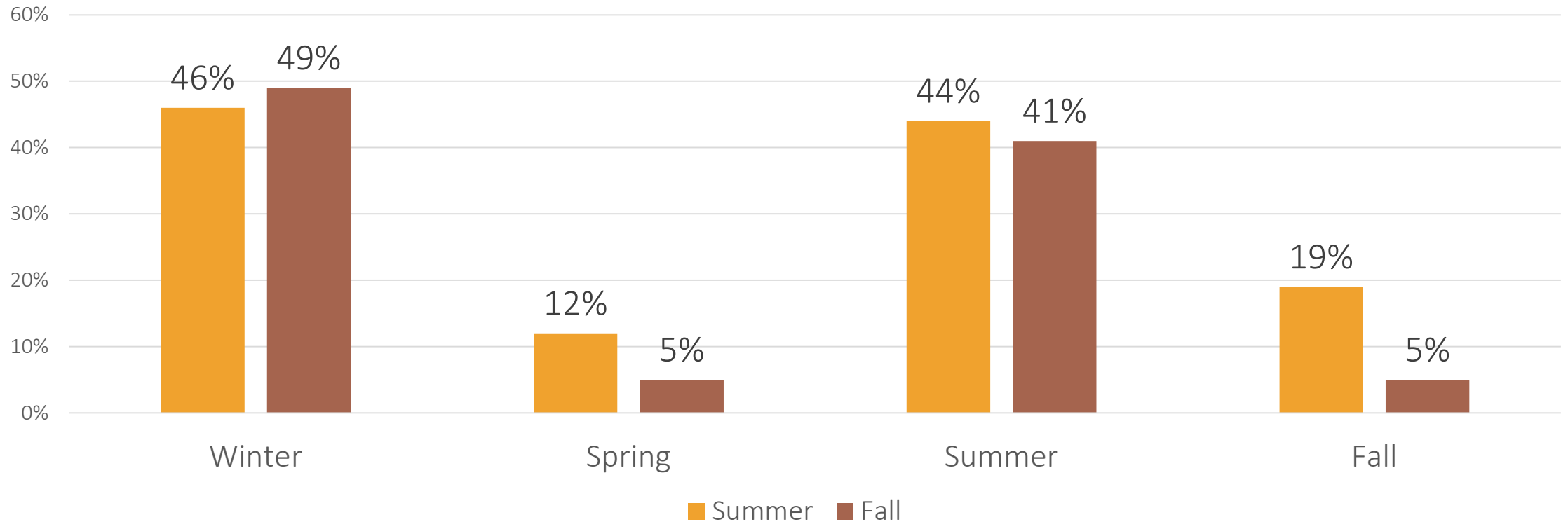
# Overall Satisfaction



# Likelihood of Returning Within 12 Months



# Season Most Likely to Return



# Notes

- The fall season saw an increase in the **percentage of new visitors**.
- The fall season also an increase in the **percentage of overnight visitors**. Typically the summer season attracts visitors who come for the day to experience the lake, activities and cooler temperatures.
- **Trip frequency was higher for those in the fall season**, length of stay similar to summer visitors.
- **Fall visitors saw a higher percentage of loyal visitors** (those visiting 5 times in the past five years) and a slightly lower percentage of passionate visitors.
- Overall experience of the trip was high.

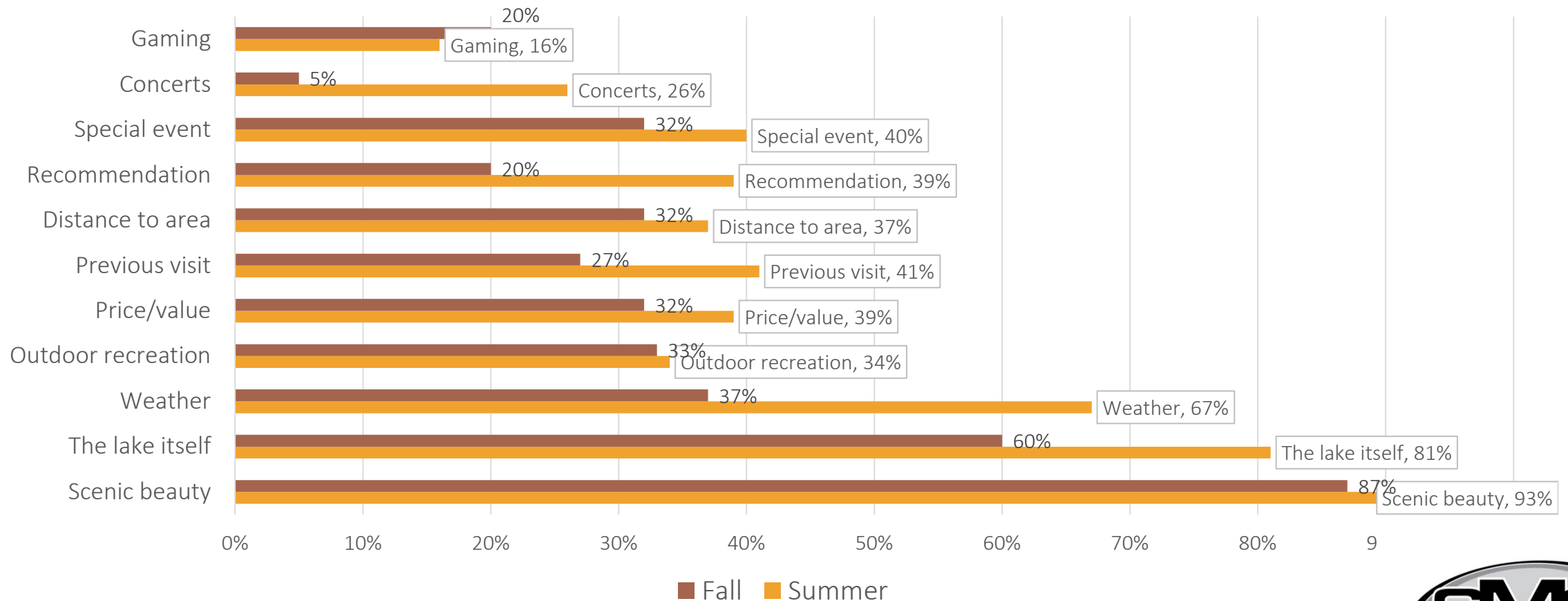


# About the Destination

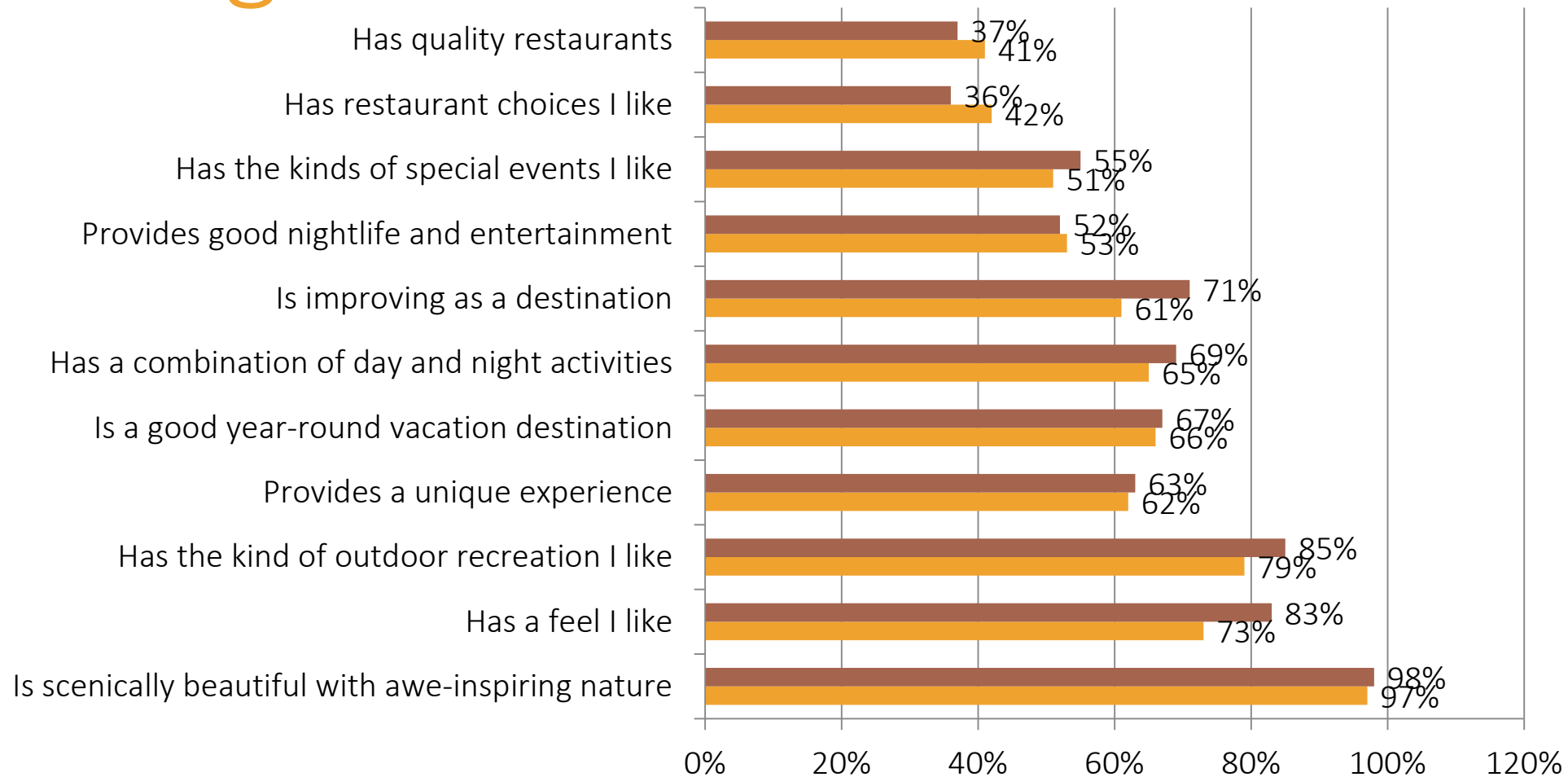




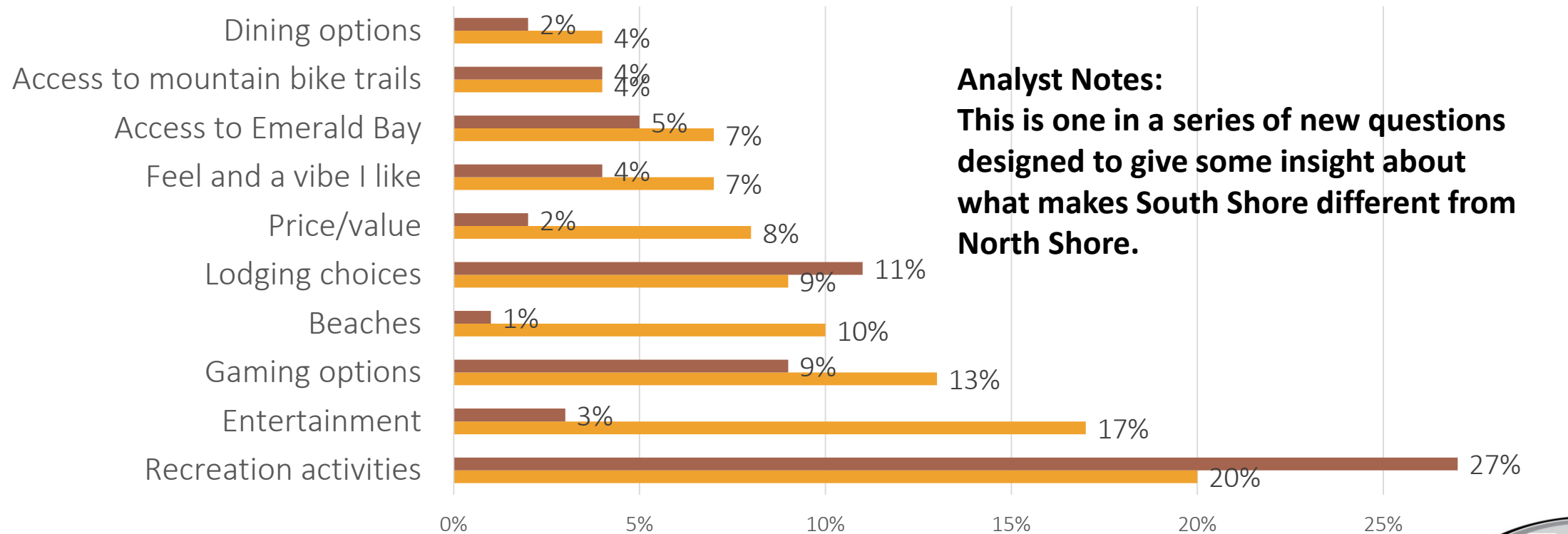
# Attribute Importance Rating in Decision to Visit



# South Shore Attribute Agreement Ratings



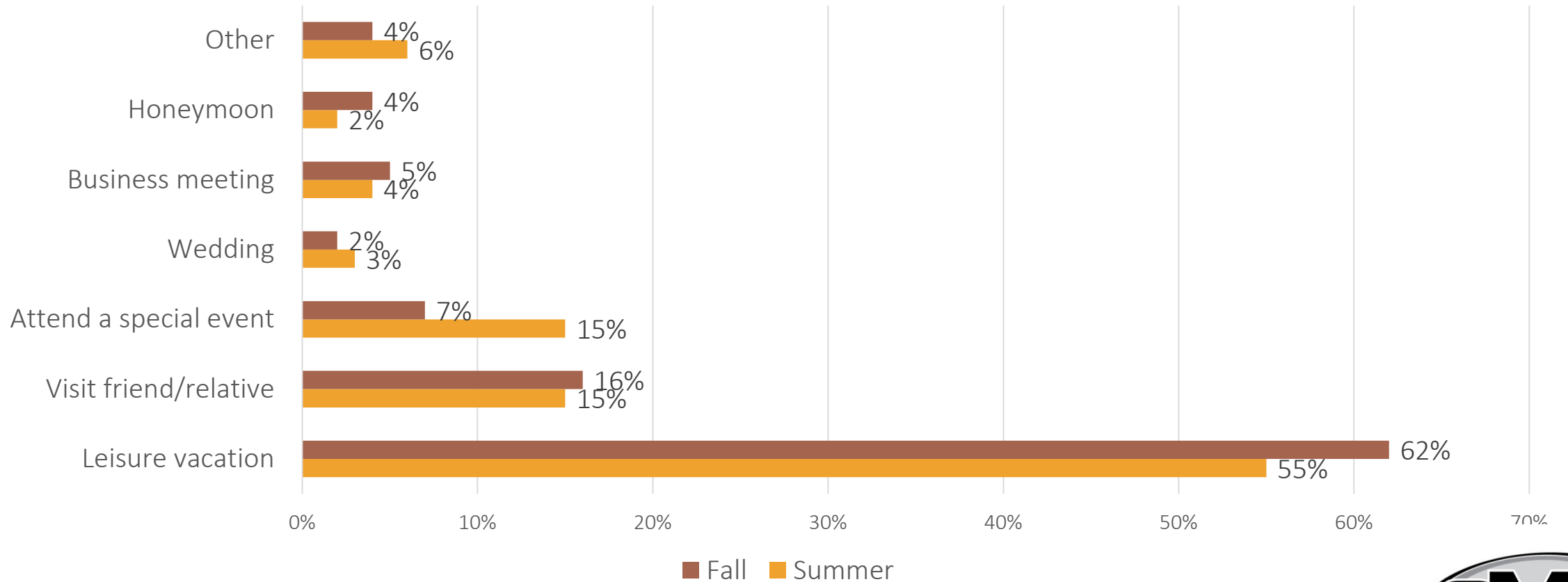
# Primary Reason for Choosing Tahoe South Instead of Other Parts of Lake Tahoe (Top Ten)



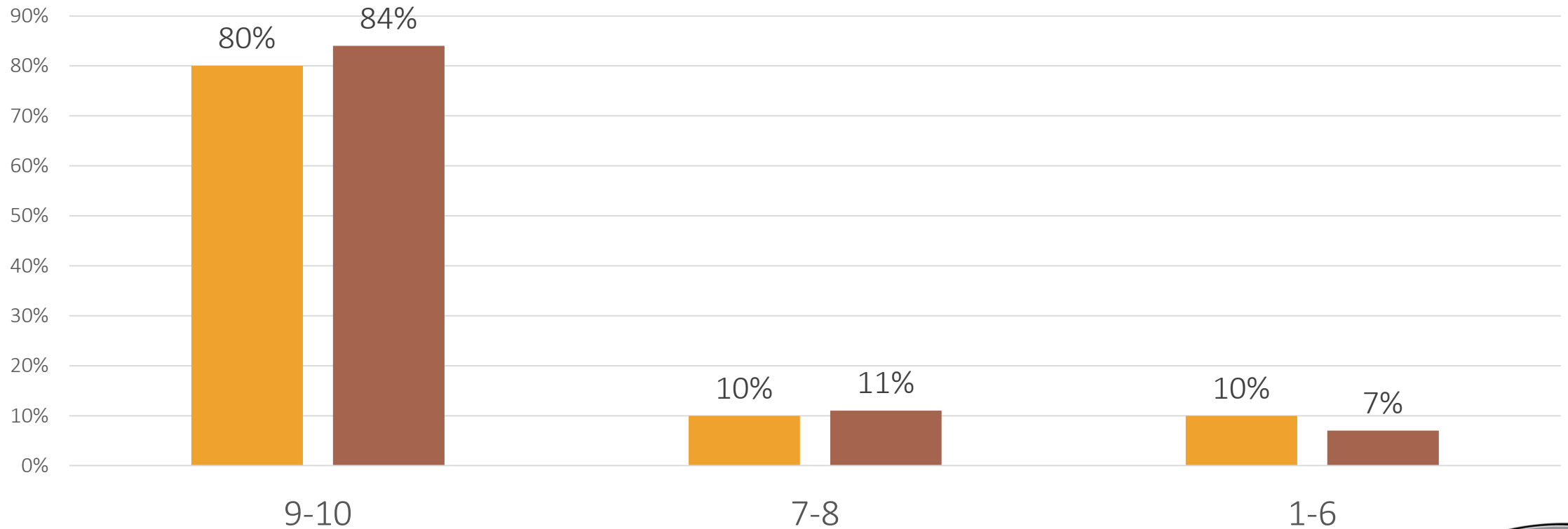
**Analyst Notes:**  
This is one in a series of new questions designed to give some insight about what makes South Shore different from North Shore.



# Primary Reason for Visiting



# How Likely to Recommend Tahoe South to a Friend, Family Member or Colleague? 10 = Extremely Likely



# Notes

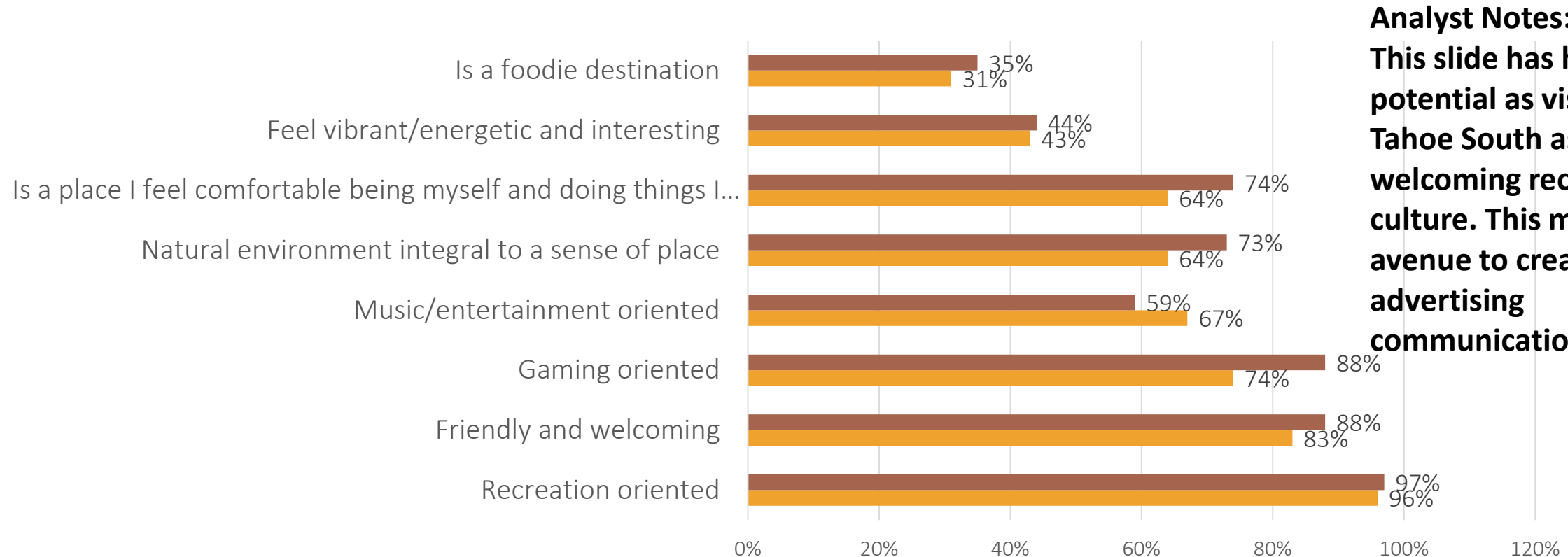
- **Scenic beauty and the lake continues to be the most important attribute** when considering the destination.
- Note the **decrease in concerts as an important attribute in deciding to take a visit**. The availability of concerts may play an important role in the decision making process for the rest of the year. Other research by the LTVA has identified the importance of the outdoor concerts as a reason for visitation.
- Of the attributes tested **restaurants received the lowest agreement rating**, additional effort needs to be focused to strengthen this offering.
- Note the **decrease in special event attendance** in the fall season vs. the summer season.



# Destination Culture



# Which Best Describes the Local Culture?

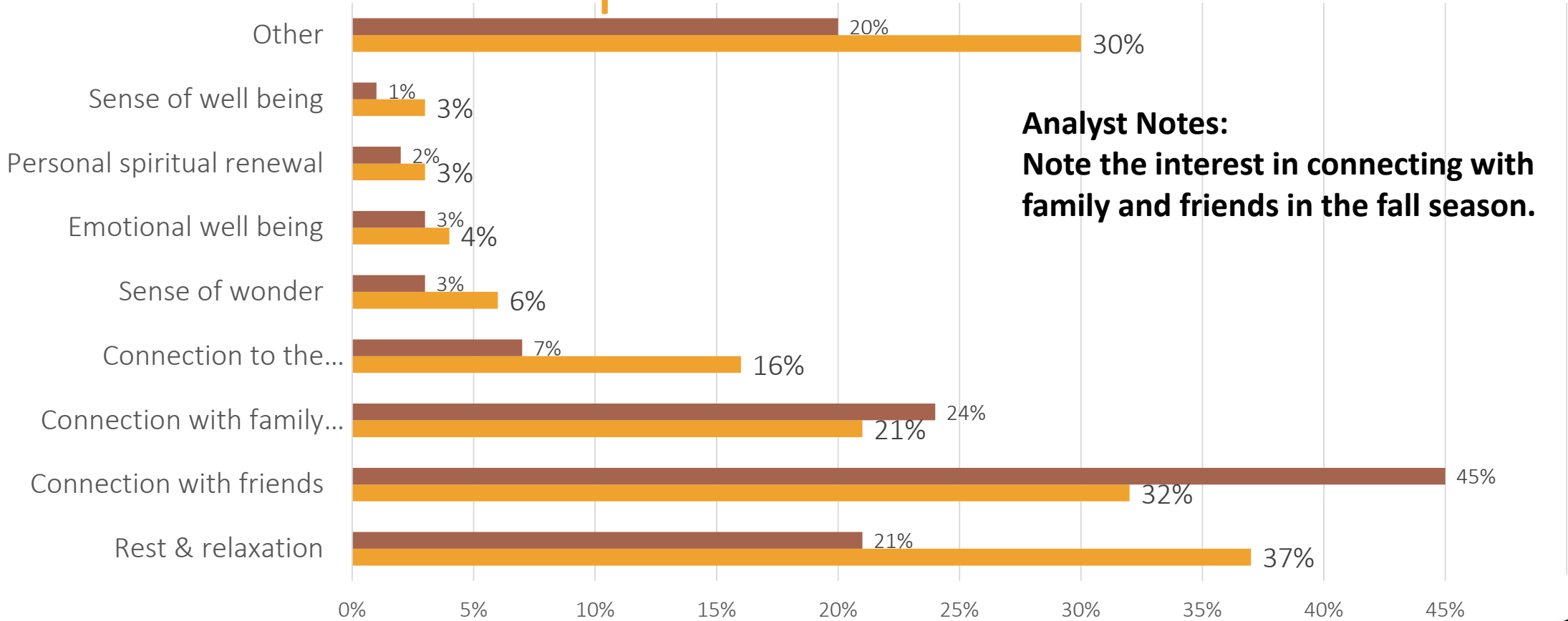


**Analyst Notes:**  
**This slide has huge potential as visitors see Tahoe South as primarily a welcoming recreation culture. This might be an avenue to create a feel for advertising communication.**





# What Did You Personally Want to Get Out of this Trip to Tahoe South?



**Analyst Notes:**  
**Note the interest in connecting with family and friends in the fall season.**



# Summary

- There is a strong interest in Tahoe South.
- Fall visitors have **slightly different interests and emphasize different elements** of the destination and their trip.
- The value of special events during the summer is made clear with data from the fall.
- The destination is seen **primarily as a recreation destination** and the local culture reflects that.
- A good percentage of people are looking to connect with friends and family while on vacation.
- People are generally enjoying their trip.

