



August 14, 2013

To: Ron Trabes, North Lake Tahoe Resort Association

From: Carl Ribaud, Strategic Marketing Group

RE: **North Lake Tahoe Research Review**

Ron,

SMG has reviewed the research made available by the NLTRA, including the following reports:

- Eastern Placer Community Survey
- NLTRA Website Survey
- Placer County Travel Industry Assessment and Detailed Economic Impact Estimates 2002-2008
- The Economic Significance of Travel to the North Lake Tahoe Area
- North Lake Tahoe Ad Tracking Full Report
- North Lake Tahoe Visitor Survey Summer

We have summarized each of the studies and developed an analysis that identifies the linkages between the studies. The studies under review can be categorized as follows:

Study Type 1 – Community/Political

Study Type 2 – Economic Impact/Analysis

Study Type 3 – Advertising/Visitor Study (It should be noted that the visitor study was conducted within the visitor center and has a small sample size)

Each of the studies provides some value for the NLTRA as it refines its strategic direction, including past context. We feel these studies can be used as long as they are qualified in how they are used and the date of the study sourced is included. In that way the reader can determine the value of the information.

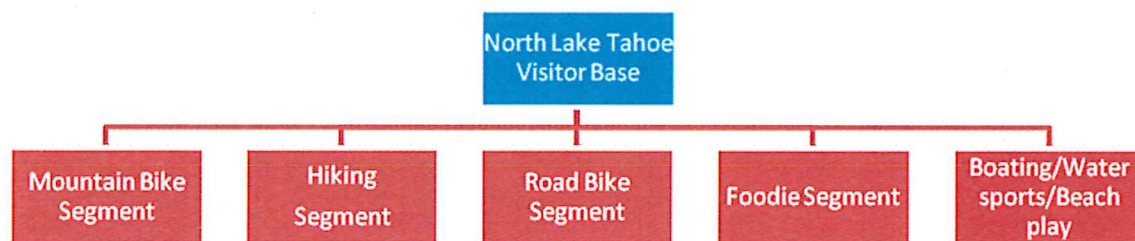
One data gap we did identify is a **lack of information related to activity participation of visitors to the area**. Much of the research conducted is at the destination level and how the destination compares and competes with other destinations. However there does not appear to be detailed primary research on activities that visitors participate in while in North Lake Tahoe, nor is there any visitor profile data for activity participants.

For example:

- Recreation – North Lake Tahoe is a destination that offers a significant level of recreation. However **there is no research** that specifically addresses those who participate in a variety of North Shore’s recreation offerings.
- Foodies – The North Lake Tahoe area attracts visitors because of the dining experiences the destination offers. Currently there is **no detailed information on that visitor profile**.

Additional primary research, including demographic, psychographic perception and behavior of these sample segments would allow NLTRA staff to further understand those visitors and their specific needs and wants. With this information NLTRA staff can develop more targeted approaches as well as segment models **to understand the value and potential economic impact of these segments**.

The figure below illustrates the focused recreation participation research that will provide unique insights and how each segment views the destination. Once these nuances are better understood promotional messaging and programming can be modified to better fit each segment.



As well, focus group research can provide idea generation among specific segments, which can be used as a basis for further research and/or product modification/development.

Table 1: NLTRA Research Summary

<p>Eastern Placer Community Survey</p> <ul style="list-style-type: none"> • Year: 2008 • Firm: RRC Associates • Survey group: Residents and absentee residential property owners • Study focus: Key issues facing Eastern Placer County, satisfaction with local services, knowledge and opinions of local organizations, economic vitality, transportation and housing • Summary: Good study on local issues. Data is approximately 4 years old. As such limited value. Provides issues background and context information.
<p>NLTRA Website Survey</p> <ul style="list-style-type: none"> • Year: 2008/2009 • Firm: RRC Associates • Survey group: Consumer website visitors • Study focus: Variety of topics relevant to NLTRA’s tourism marketing and infrastructure planning efforts including priorities for improvement to the visitor experience, travel planning issues, trip decision factors, characteristics of trips to North Lake Tahoe, perceptions of North Lake Tahoe and visitors demographics. • Summary: Detailed study of website user data provides good context among specific issues. Given that data is four years old as of this writing it could be used to provide overall context of issues.
<p>Placer County Travel Industry Assessment and Detailed Economic Impact Estimates 2002-2008</p> <ul style="list-style-type: none"> • Year: 2009 • Firm: Dean Runyan Associates • Survey group: N/A • Study focus: Economic overview of Placer County with regard to travel. Economic impacts by region within Placer County, opportunities and constraints by region. • Summary: Provides good trend data between 2002 and 2008. Revenue ratios could be developed and applied to newer annual Visit California statewide travel impact study. If used methodology should be noted.
<p>The Economic Significance of Travel to the North Lake Tahoe Area</p> <ul style="list-style-type: none"> • Year: 2009 • Firm: Dean Runyan Associates • Survey group: N/A • Study focus: Detailed economic analysis of visitor spending within the North Lake Tahoe area. Construction and real estate overview and employment, competitor area information. • Summary: Provides good trend data between 2002 and 2008. Revenue ratios could be developed and be used in providing updated ball park estimates for the North Lake Tahoe area. If used methodology should be noted.
<p>North Lake Tahoe Ad Tracking Full Report</p> <ul style="list-style-type: none"> • Year: 2011 • Firm: Smith & Jones • Survey group: San Francisco and Los Angeles DMAs • Study focus: Understand awareness and visitation, preferences for both North and South Lake Tahoe. Awareness and brand perception of North Lake Tahoe, understand the impact of the North Lake Tahoe brand. • Summary: Provides excellent awareness trend information competitive awareness information. Given its recent completion information could be used and sourced.

North Lake Tahoe Public Opinion Survey

- **Year:** 2011
- **Firm:** The Lew Edwards Group
- **Survey group:** Local residents
- **Study focus:** Key issues facing residents. Satisfaction with the direction of the area, local stakeholder ratings, issues and concerns, Transient Occupancy Tax attitudes,
- **Summary:** Study was primarily used to understand local attitudes on the continuation of T.O.T. Given its recent completion date information could be used and sourced in an effort to make specific relevant points

North Lake Tahoe Visitor Survey Summer

- **Year:** 2012
- **Firm:** RRC Associates
- **Survey group:** Visitors to the North Lake Tahoe Visitor Center
- **Study focus:** Visitor profile information
- **Summary:** Small sample size, focus on visitor characteristics, trip planning destination satisfaction

Table 2: Study Content Links

Eastern Placer Community Survey	North Lake Tahoe Public Opinion Survey	NLTRA Website Survey	North Lake Tahoe Ad Tracking Full Report	North Lake Tahoe Visitor Survey Summer	The Economic Significance of Travel to the North Lake Tahoe Area	Placer County Travel Industry Assessment and Detailed Economic Impact Estimates
2009	2011	2009	2011	2012	2009	2009
Local Resident	Local Resident	Visitor	Visitor	Visitor	Visitor	Visitor
Local community Issues Quality of life Key issues Satisfaction/local services Local organizations Economic vitality Transportation Housing Environment Parks and rec Arts & culture Improvements Funding	Local confidence Local stakeholders Key issues T.O.T. attitudes Ballot measure preference Priorities Messaging	Demographics Previous visit Trip planning Perceptions Decision factors Destination Improvements Packages Environmental Practices Gas price impact	Demographics Resort awareness Lake Tahoe awareness Visitation tendencies Reason for visiting Competitive perception Ad awareness Message recall Ad impression Ad characteristics Ad influence Logo evaluation Travel behavior Transportation Vacation planning Vacation types	Visitor type Trip characteristics Lodging Arrival method Reason for visit Attraction Event attendance Trip planning Perceptions NLT amenities Spending Quality ratings Demographics Geo point of origin	Visitor volume and spending Earnings and employment Tax impacts Construction & real estate Visitor impact Competitive areas	Market factors and trends Economic impact of travel Tourism assessment & recommendations

Notes:

1. Finding some or parts of the above information could be useful depending upon the situation and section.
2. There is a missing data gap, specifically data that would help understand profile of activity participation
3. Is the North Lake Tahoe product competitive with the competitive set?
4. What customer segments does North Lake Tahoe want to attract and does the destination have what the visitor wants? Reverse the question – what do locals do and how can you reach similar segments?