

**NORTH LAKE TAHOE VISITOR SURVEY SUMMER 2012  
Preliminary Results**

		<b>OVERALL - ALL SURVEYS</b>
<b>WHICH BEST DESCRIBES YOUR VISIT TO NORTH LAKE TAHOE?</b>	Visitor spending tonight in North Lake Tahoe	63%
	Visitor passing through, spending the night elsewhere	18%
	Day visitor (from outside NLT, returning home tonight)	17%
	NLT resident	2%
<b>TOTAL</b>		100%
	n =	265
<b>For your recent visit to North Lake Tahoe, were you...? (FOLLOW UP)</b>	An overnight visitor, spending at least one night in the Nor	67%
	A visitor passing through, spending the night elsewhere	25%
	A day visitor (started and ended your day at your own home)	8%
<b>TOTAL</b>		100%
	n =	24

06 Dec 12  
Source: RRC Associates

**NORTH LAKE TAHOE VISITOR SURVEY  
SUMMER 2012  
Preliminary Results**

<b>OVERNIGHT VISITORS ONLY</b>		<b>OVERALL - ALL SURVEYS</b>
<b>NIGHTS IN NORTH LAKE TAHOE THIS TRIP</b>	1	10%
	2	19%
	3	18%
	4	15%
	5	13%
	6 or more	25%
<b>TOTAL</b>		100%
<b>Average</b>		4.1
<b>Median</b>		4.0
<b>n =</b>		165
<b>How many nights did you stay in North Lake Tahoe on your trip? (FOLLOW UP)</b>	2	9%
	3	9%
	4	9%
	5	18%
	6 or more	55%
<b>TOTAL</b>		100%
<b>Average</b>		5.8
<b>Median</b>		7.5
<b>n =</b>		11
<b>How many nights in total were you away from home on your trip?</b>	4	9%
	6 or more	91%
<b>TOTAL</b>		100%
<b>Average</b>		7.2
<b>Median</b>		7.5
<b>n =</b>		11

06 Dec 12  
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**NORTH LAKE TAHOE VISITOR SURVEY SUMMER 2012  
Preliminary Results**

<b>OVERNIGHT VISITORS ONLY</b>		<b>OVERALL - ALL SURVEYS</b>
<b>LODGING TYPE</b>	In paid lodging (hotel, condo rental, etc.)	65%
	In a second home/vacation unit I own	13%
	With friends/family who live in the area	10%
	Tent/camping/RV	8%
	Other	4%
<b>TOTAL</b>		100%
	n =	164
<b>Please describe your accommodations while you were in North Lake Tahoe</b>	Paid lodging (hotel/motel, condo rental, etc )	44%
	In a second home/vacation unit you own	12%
	Tent/RV/camping	19%
	With friends/family who live in the area	12%
	Other	12%
<b>TOTAL</b>		100%
	n =	16
<b>WHERE IS YOUR LODGING LOCATED?</b>	Squaw Valley	9%
	Tahoe City	42%
	West Shore	6%
	Tahoe Vista	7%
	Incline Village	3%
	Kings Beach	6%
	Northstar	1%
	Crystal Bay	1%
	Truckee	1%
	Other	23%
<b>TOTAL</b>		100%
	n =	161
<b>How did you make your lodging reservations?</b>	No reservations	13%
	Internet site	47%
	Direct to lodge/hotel	20%
	Other	20%
<b>TOTAL</b>		100%
	n =	15

06 Dec 12  
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**NORTH LAKE TAHOE VISITOR SURVEY SUMMER 2012  
Preliminary Results**

<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>HOW MANY PEOPLE ARE WITH YOU?</b>	1 (by myself)	3%
	2	45%
	3	11%
	4	19%
	5	5%
	6 or more	16%
<b>TOTAL</b>		100%
<b>Average</b>		3.5
<b>Median</b>		3.0
<b>n =</b>		263
<b>How many people (total) were with you in North Lake Tahoe on your trip? (FOLLOW UP)</b>	2	39%
	3	9%
	4	13%
	5	26%
	6 or more	13%
<b>TOTAL</b>		100%
<b>Average</b>		3.8
<b>Median</b>		4.0
<b>n =</b>		23
<b>WITH WHOM WERE YOU TRAVELING?</b>	<b>Just myself</b>	
	<b>Spouse/partner</b>	91%
	<b>Children</b>	48%
	<b>Grandchildren</b>	4%
	<b>:With whom were you travelling on your trip to North Lake Tahoe? (CHECK ALL THAT APPLY)</b>	22%
	<b>Friends</b>	22%
	<b>Group/club/team members</b>	
	<b>Business associates</b>	
<b>TOTAL</b>		187%
<b>n =</b>		23

06 Dec 12  
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**NORTH LAKE TAHOE VISITOR SURVEY SUMMER 2012  
Preliminary Results**

<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
Did you fly to reach California on your trip?	Yes, by commercial airplane	19%
	No	81%
TOTAL		100%
	n =	16
At which airport did you arrive?	Reno Tahoe International (RNO)	67%
	San Francisco International (SFO)	33%
TOTAL		100%
	n =	3
How did you reach North Lake Tahoe from the airport?	Private vehicle	33%
	Rental vehicle	67%
TOTAL		100%
	n =	3

06 Dec 12  
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**NORTH LAKE TAHOE VISITOR SURVEY SUMMER 2012  
Preliminary Results**

<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>PRIMARY REASON FOR YOUR VISIT TO NORTH LAKE TAHOE</b>	Business (meeting, convention, etc.)	2%
	Combined business/pleasure	0%
	College planning/event	0%
	Special event/festival	2%
	Stop on a tour of the area	11%
	Recreation/general vacation	75%
	Visit friends/family	5%
	Other	4%
<b>TOTAL</b>		100%
	n =	261
<b>What was the primary reason for your trip?</b>	Combined business/pleasure	4%
	Stop on a tour of the area	4%
	Recreation/general vacation	79%
	Special event/festival	4%
	Other	8%
<b>TOTAL</b>		100%
	n =	24

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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>ON THIS TRIP, IS NORTH LAKE TAHOE:</b>	Your primary destination	51%
	A planned stop on a longer trip	37%
	An unplanned stop on a longer trip	12%
<b>TOTAL</b>		100%
	n =	260
<b>For this trip, was North Lake Tahoe: (FOLLOW UP)</b>	Your primary destination	46%
	A planned stop on a longer trip	33%
	An unplanned stop on a longer trip	21%
<b>TOTAL</b>		100%
	n =	24
<b>What other places did you visit on your trip?</b>	Historical Sites	27%
	Beaches	32%
	Music Events	9%
	Other	32%
<b>TOTAL</b>		100%
	n =	22
<b>ACTIVITIES YOU PARTICIPATED IN DURING YOUR VISIT</b>	General sightseeing	92%
	Cycling/mountain biking	17%
	Hiking/climbing	58%
	Shopping	50%
	Dining	71%
	People watch/hang out	29%
	Watch athletic event	
	Attend a concert	21%
	Running/walking	46%
	Special event	25%
	Job interview	
	Business meeting	
	Real estate search	4%
	None of the above	
	Other	29%
<b>TOTAL</b>		442%
	n =	24

06 Dec 12  
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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>ATTRACTIONS YOU VISITED</b>	Squaw Valley Tram	13%
	Northstar Bike Park	4%
	Truckee River Rafting	30%
	Kings Beach State Recreation Area	43%
	Emerald Bay	52%
	Sugar Pine Point State Park	22%
	Tahoe City Commons Beach	43%
	Other	17%
	None of the above	9%
	<b>TOTAL</b>	
n =		23
<b>EVENTS YOU ATTENDED</b>	Tahoe High Notes	
	Brews, Jazz and Funk Festival	10%
	Star Sessions at Northstar	
	Taho Nalu Paddleboard Event	
	Lake Tahoe Shakespeare Festival	15%
	Wanderlust Festival	
	Lake Tahoe 100 Bike Race	
	Lake Tahoe Adventure Sports Week	5%
	Wine Tasting Events	5%
	Other	25%
	None of the above	55%
	<b>TOTAL</b>	
n =		20

06 Dec 12  
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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>When did you begin planning your trip?</b>	1 to 2 weeks in advance	4%
	3 to 4 weeks in advance	17%
	1 to 2 months in advance	33%
	2 to 3 months in advance	17%
	More than 3 months in advance	21%
	Less than a week in advance	8%
<b>TOTAL</b>		100%
	n =	24
<b>INFORMATION SOURCES USED TO PLAN TRIP</b>	Previous visit	46%
	Internet websites	67%
	Family/friends	38%
	North Lake Tahoe Visitor Guide	12%
	Travel agent/club/AAA	17%
	Magazine	12%
	Newspaper	4%
	Radio/TV	
	Brochures	17%
	None of the above	
	Other	4%
<b>TOTAL</b>		217%
	n =	24

06 Dec 12  
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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>WHAT WERE YOUR MOST POSITIVE IMPRESSIONS OF NORTH LAKE TAHOE?</b>	Variety of activities/attractions	83%
	Environmental efforts/awareness	50%
	Proximity to other destinations	42%
	Friendly people	58%
	Scenery	88%
	Other	8%
<b>TOTAL</b>		329%
	n =	24
<b>WHAT ADDITIONAL AMENITIES ARE NEEDED IN NORTH LAKE TAHOE?</b>	Greater variety - shopping	27%
	Greater variety - dining	27%
	Greater variety - cultural offerings	27%
	Greater variety - nightlife	13%
	More kids' activities	20%
	More adult activities	27%
	Better customer service	7%
	Other	33%
<b>TOTAL</b>		180%
	n =	15

06 Dec 12  
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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>How many visits to North Lake Tahoe have you made in the past 5 years?</b>	None, first visit	42%
	One	4%
	Two	21%
	3 to 5	12%
	6 to 9	4%
	10 to 14	4%
	20 or more	12%
	<b>TOTAL</b>	
	n =	24

06 Dec 12  
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**NORTH LAKE TAHOE VISITOR SURVEY SUMMER  
2012  
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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>WHAT DO YOU ESTIMATE SPENDING IN NLT THIS TRIP?</b>	Under \$100	24%
	\$100-299	18%
	\$300-499	16%
	\$500-699	7%
	\$700-999	9%
	\$1,000-1,999	10%
	\$2,000-2,999	9%
	\$3,000 or more	2%
	Don't know/not sure	5%
<b>TOTAL</b>		100%
<b>Average</b>		718.9
<b>Median</b>		400.0
<b>n =</b>		243
<b>What do you estimate you spent while in North Lake Tahoe? (FOLLOW UP)</b>	Under \$100	25%
	\$100 - \$299	17%
	\$300 - \$499	8%
	\$500 - \$699	8%
	\$700 - \$999	8%
	\$1,000 - \$1,999	8%
	\$2,000 - \$2,999	17%
	\$3,000 or more	8%
<b>TOTAL</b>		100%
<b>Average</b>		1033.3
<b>Median</b>		500.0
<b>n =</b>		24

06 Dec 12  
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**NORTH LAKE TAHOE VISITOR SURVEY  
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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>Lodging quality</b>	Extremely Dissatisfied 1	5%
	3	24%
	4	29%
	Extremely Satisfied 5	43%
<b>TOTAL</b>		100%
<b>Average</b>		4.0
<b>n =</b>		21
<b>Lodging value</b>	1=Extremely Dissatisfied	5%
	3	35%
	4	35%
	5=Extremely Satisfied	25%
<b>TOTAL</b>		100%
<b>Average</b>		3.8
<b>n =</b>		20
<b>Lodging service</b>	1=Extremely Dissatisfied	5%
	3	25%
	4	45%
	5=Extremely Satisfied	25%
<b>TOTAL</b>		100%
<b>Average</b>		3.9
<b>n =</b>		20

06 Dec 12  
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**NORTH LAKE TAHOE VISITOR SURVEY  
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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>Restaurant quality</b>	1=Extremely Dissatisfied	6%
	2	6%
	3	33%
	4	33%
	5=Extremely Satisfied	22%
<b>TOTAL</b>		100%
<b>Average</b>		3.6
<b>n =</b>		18
<b>Restaurant value</b>	1=Extremely Dissatisfied	5%
	2	5%
	3	42%
	4	32%
	5=Extremely Satisfied	16%
<b>TOTAL</b>		100%
<b>Average</b>		3.5
<b>n =</b>		19
<b>Restaurant service</b>	1=Extremely Dissatisfied	6%
	2	6%
	3	22%
	4	33%
	5=Extremely Satisfied	33%
<b>TOTAL</b>		100%
<b>Average</b>		3.8
<b>n =</b>		18

06 Dec 12  
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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>Variety of activities</b>	1=Extremely Dissatisfied	4%
	3	13%
	4	43%
	5=Extremely Satisfied	39%
<b>TOTAL</b>		100%
<b>Average</b>		4.1
<b>n =</b>		23
<b>Overall town cleanliness</b>	1=Extremely Dissatisfied	8%
	3	4%
	4	46%
	5=Extremely Satisfied	42%
<b>TOTAL</b>		100%
<b>Average</b>		4.1
<b>n =</b>		24
<b>Overall value of stay</b>	1=Extremely Dissatisfied	5%
	3	10%
	4	57%
	5=Extremely Satisfied	29%
<b>TOTAL</b>		100%
<b>Average</b>		4.0
<b>n =</b>		21

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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
Likelihood you'll return to North Lake Tahoe in the future	2	4%
	6	12%
	7	17%
	8	8%
	9	8%
	10=Extremely Likely	50%
<b>TOTAL</b>		100%
<b>Average</b>		8.4
<b>n =</b>		24
LIKELIHOOD OF RECOMMENDING NLT	2	0%
	3	0%
	5 - Neutral	4%
	6	2%
	7	11%
	8	14%
	9	15%
	10 - Extremely Likely	55%
<b>TOTAL</b>		100%
<b>Average</b>		8.9
<b>n =</b>		255
Likelihood you'd recommend a visit to North Lake Tahoe to a friend, family member, or colleague (FOLLOW UP)	2	4%
	6	8%
	7	12%
	8	12%
	9	17%
	10=Extremely Likely	46%
<b>TOTAL</b>		100%
<b>Average</b>		8.5
<b>n =</b>		24

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Preliminary Results**

<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
<b>AGE</b>	Under 18	1%
	18 to 20	1%
	21 to 24	2%
	25 to 34	17%
	35 to 44	17%
	45 to 54	25%
	55 to 64	23%
	65 and over	15%
<b>TOTAL</b>		100%
<b>Average</b>		48.6
<b>Median</b>		49.5
<b>n =</b>		257
<b>HOUSEHOLD STATUS</b>	Single, no children	14%
	Couple, no children	24%
	Household (children living at home)	33%
	Empty-nester (grown children no longer at home)	30%
<b>TOTAL</b>		100%
<b>n =</b>		263
<b>GENDER</b>	Male	52%
	Female	48%
<b>TOTAL</b>		100%
<b>n =</b>		250
<b>Annual household income</b>	Below \$25,000	9%
	\$25 - \$49,999	4%
	\$50 - \$74,999	9%
	\$75 - \$99,999	9%
	\$100 - \$149,999	17%
	\$150 - \$199,999	30%
	\$200 - \$499,999	17%
	\$500,000 or more	4%
<b>TOTAL</b>		100%
<b>n =</b>		23

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<b>ALL VISITORS</b>	<b>OVERALL - ALL SURVEYS</b>
San Francisco - Oakland - San Jose -- CA	21%
International	12%
Los Angeles -- CA	10%
Sacramento - Stockton - Modesto -- CA	8%
San Diego -- CA	6%
Fresno - Visalia -- CA	3%
Chicago -- IL, IN	3%
Reno -- CA, NV	3%
Minneapolis - Saint Paul -- MN, WI	2%
Boston (Manchester) -- MA, NH, VT	2%
Seattle - Tacoma -- WA	2%
Washington (Hagerstown) -- DC, MD, PA, VA, WV	2%
Phoenix -- AZ, CA	2%
Salt Lake City -- CO, ID, NV, UT	2%
Monterey - Salinas -- CA	2%
Detroit -- MI	1%
Orlando - Daytona Beach - Melbourne -- FL	1%
New York -- CT, NJ, NY, PA	1%
Cincinnati -- IN, KY, OH	1%
Charlotte -- NC, SC	1%
Atlanta -- AL, GA, NC	1%
Rochester -- NY	1%
Dallas - Fort Worth -- TX	1%
Birmingham (Anniston and Tuscaloosa) -- AL	1%
Austin -- TX	1%

**DESIGNATED MARKET**

(cont.)

**NORTH LAKE TAHOE VISITOR SURVEY SUMMER 2012  
Preliminary Results**

(cont.)

<b>ALL VISITORS</b>	<b>OVERALL - ALL SURVEYS</b>
Madison -- WI	1%
Juneau -- AK	1%
Medford - Klamath Falls -- CA, OR	1%
Portland -- OR, WA	1%
Santa Barbara - Santa Maria - San Luis Obispo -- CA	1%
Chico - Redding -- CA	1%
Pittsburgh -- MD, PA, WV	0%
Cleveland -- OH	0%
Columbus -- OH	0%
Tampa - Saint Petersburg (Sarasota) -- FL	0%
Greenville - New Bern - Washington -- NC	0%
Richmond - Petersburg -- VA	0%
Lima -- OH	0%
Jacksonville, Brunswick -- FL, GA	0%
Grand Rapids - Kalamazoo - Battle Creek -- MI	0%
Johnstown - Altoona -- PA	0%
Saint Louis -- IL, MO	0%
Shreveport -- AR, LA, OK, TX	0%
Kansas City -- KS, MO	0%
Houston -- TX	0%
Nashville -- KY, TN	0%
Tulsa -- KS, OK	0%
Quincy - Hannibal - Keokuk -- IL, IA	0%
Anchorage -- AK	0%
Denver -- CO, MT, NE, NV, SD, WY	0%

(cont.)

**NORTH LAKE TAHOE VISITOR SURVEY SUMMER 2012  
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(cont.)

<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
	Bend -- OR	0%
<b>TOTAL</b>		100%
	n =	251

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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
	California	52%
	United Kingdom	5%
	Canada	4%
	Illinois	3%
	Nevada	3%
	Florida	2%
	Minnesota	2%
	Ohio	2%
	Oregon	2%
	Texas	2%
	Washington	2%
	Arizona	2%
	Massachusetts	2%
	Michigan	2%
	Utah	2%

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**NORTH LAKE TAHOE VISITOR SURVEY  
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(cont.)

<b>ALL VISITORS</b>	<b>OVERALL - ALL SURVEYS</b>
Alaska	1%
North Carolina	1%
Virginia	1%
Wisconsin	1%
Alabama	1%
Georgia	1%
Maryland	1%
Missouri	1%
New York	1%
Pennsylvania	1%
Switzerland	1%
Arkansas	0%
Austria	0%
Colorado	0%
Connecticut	0%
Czechoslovakia	0%
France	0%
Germany	0%
India	0%
Israel	0%
Japan	0%
Kansas	0%
New Hampshire	0%
New Jersey	0%
Oklahoma	0%

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**NORTH LAKE TAHOE VISITOR SURVEY  
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(cont.)

<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
	Tennessee	0%
<b>TOTAL</b>		100%
	n =	252

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<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
	Santa Clara	12%
	San Diego	11%
	Alameda	10%
	Los Angeles	9%
	Orange	8%
	Fresno	5%
	Sacramento	5%
	Contra Costa	4%
	Placer	4%
	San Francisco	4%
	San Mateo	4%
	Sonoma	4%
	Marin	2%
	Nevada	2%
<b>CALIFORNIA COUNTY</b>	Butte	2%

(cont.)

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(cont.)

<b>ALL VISITORS</b>		<b>OVERALL - ALL SURVEYS</b>
	El Dorado	2%
	Inyo	2%
	Monterey	2%
	San Luis Obispo	2%
	Solano	2%
	Stanislaus	2%
	Yolo	2%
	Mariposa	1%
	San Benito	1%
	San Bernardino	1%
	Santa Cruz	1%
	Sutter	1%
	Tulare	1%
	Ventura	1%
<b>TOTAL</b>		100%
	n =	129

06 Dec 12  
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