

Truckee Donner Chamber of Commerce Visitor Profile Study

Four Season Visitor Profile Study

2013/14



Thanks You!

Thanks to the Town of Truckee for funding this Visitor Profile Study through the marketing agreement with the Truckee Donner Chamber of Commerce.



Project Objectives

- Identify factors affecting visitation to the Town of Truckee.
- Identify key visitor markets and their unique profile and visitation characteristics.
- Provide a profile of spending patterns, visitor behavior, opinions and preferences.
- Provide a demographic profile of Town of Truckee visitors.
- Collect feedback on vacation experiences and ratings including strengths and weaknesses of the destination.

A Note About Winter

- During the collection of data the winter season was unique in it was significantly impacted by a lack of natural snow which in turn had a major impact on the winter sports industry and resulting visitor demand for Truckee.

Methodology

- Intercept surveys were conducted with Truckee visitors during the months of August, October, February – March, and May – early June.
- Visitors were interviewed at various Truckee locations.
- Interviews were conducted on both weekends and weekdays, and visitors were provided a small gift to participate. No local residents were surveyed.
- A total of 599 respondents completed the survey,
 - with 200 completed surveys for the summer and winter seasons, 99 for the fall season, and 100 for the spring season.
 - 65% of surveys were collected during the Friday-Sunday time period and 35% Monday – Thursday. Surveys

Demographic Profile

Gender		Ethnicity	
Male	45%	White	82%
Female	55%	African American	1%
Marital Status:		Asian American	5%
Single	19%	Hispanic/Latino	10%
Married	60%	Native American	1%
Living together	20%	Other	1%
Widowed	1%		
Family Status:			
No children	40%		
Children at home	31%		
Empty nester	29%		

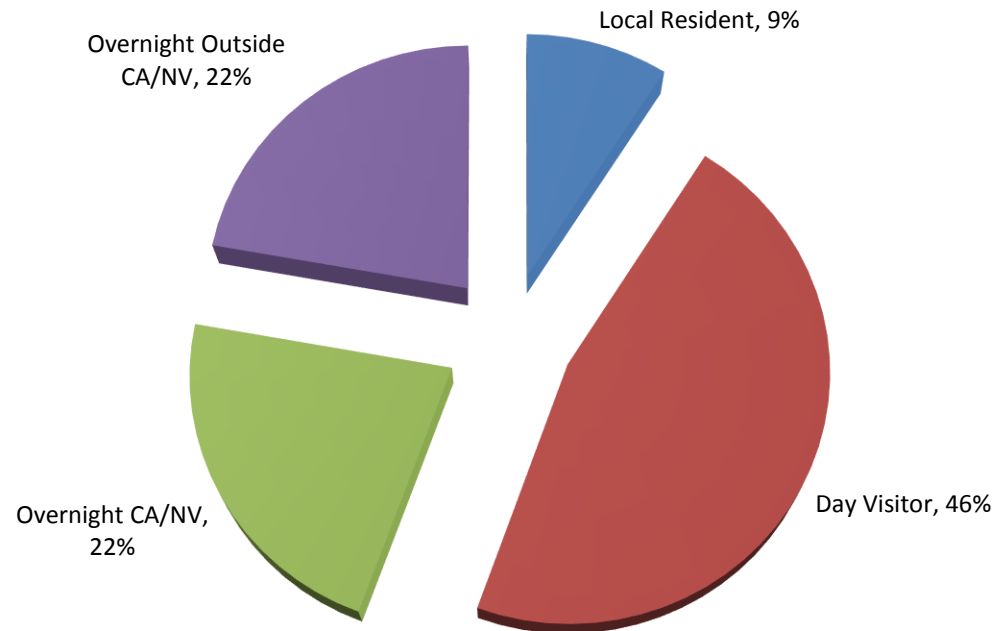
Demographic Profile

Income	Percent		Age	Percent
0-\$29,000	4%		Under 25	13%
\$30,000-39,999	8%		25-30	18%
\$40,000-49,999	7%		31-40	18%
\$50,000-59,999	7%		41-50	13%
\$60,000-69,999	8%		51-60	15%
\$70,000-99,999	18%		Over 60	21%
\$100,000-149,999	21%		Mean	43%
\$150,000-200,000	11%		Median	41%
\$200,000-249,000	7%		No Answer	2%
\$250,000-349,000	6%			
\$350,000-499,999	3%			
Mean	\$126,000			
Median	\$97,000			

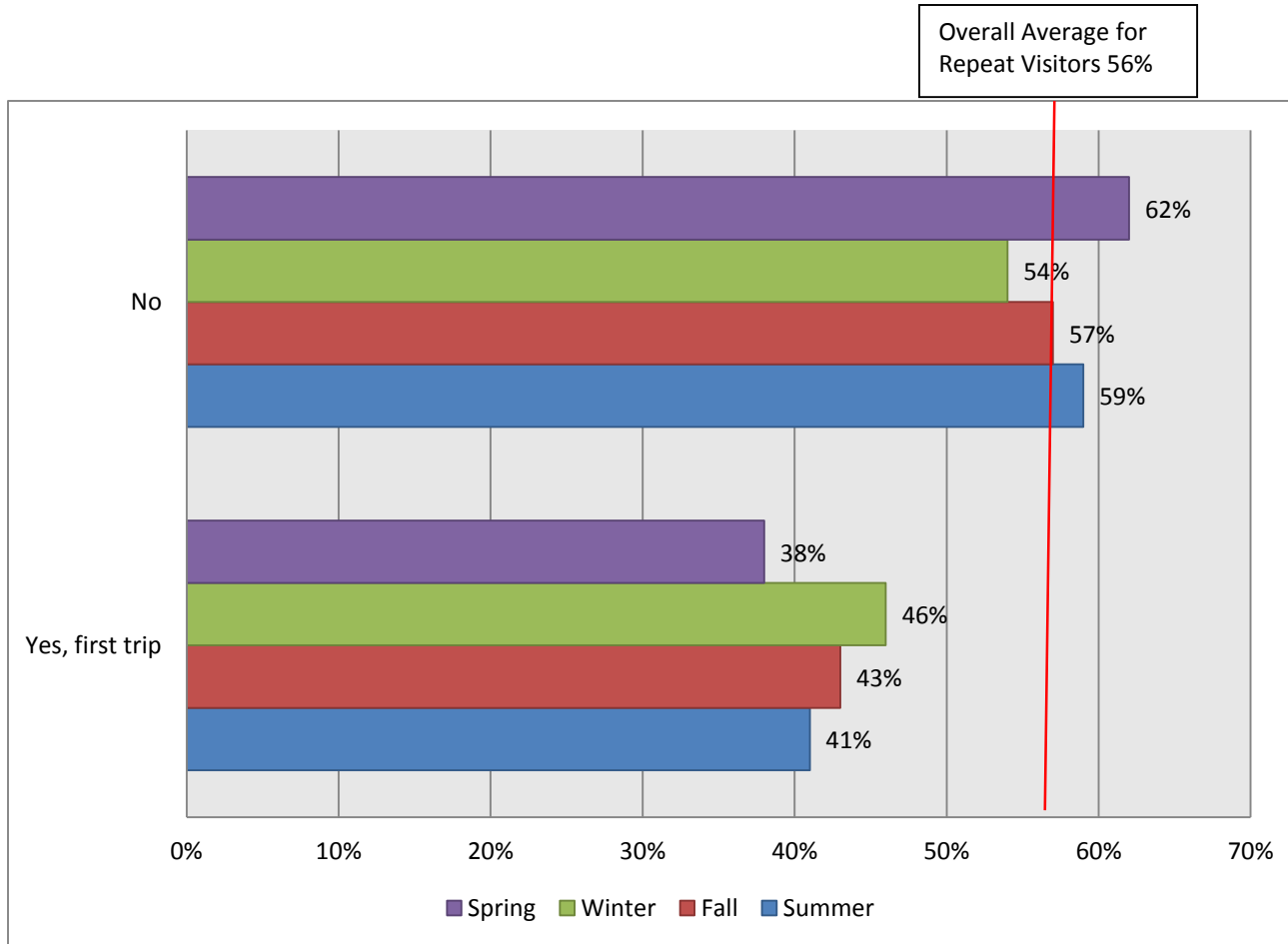
Place of Origin

Market	Pct.		Market	Pct.
California:			Other States	
Northeren California	46%		Southwest	6%
Bay Area	20%		Northwest	3%
Sacramento	11%		Other states	19%
Other N California	15%			
Other CA	12%		International	2%
Total CA	58%			
Nevada:				
Northern Nevada	9%			
Other Nevada	3%			
Total Nevada	12%			

Visitor Type



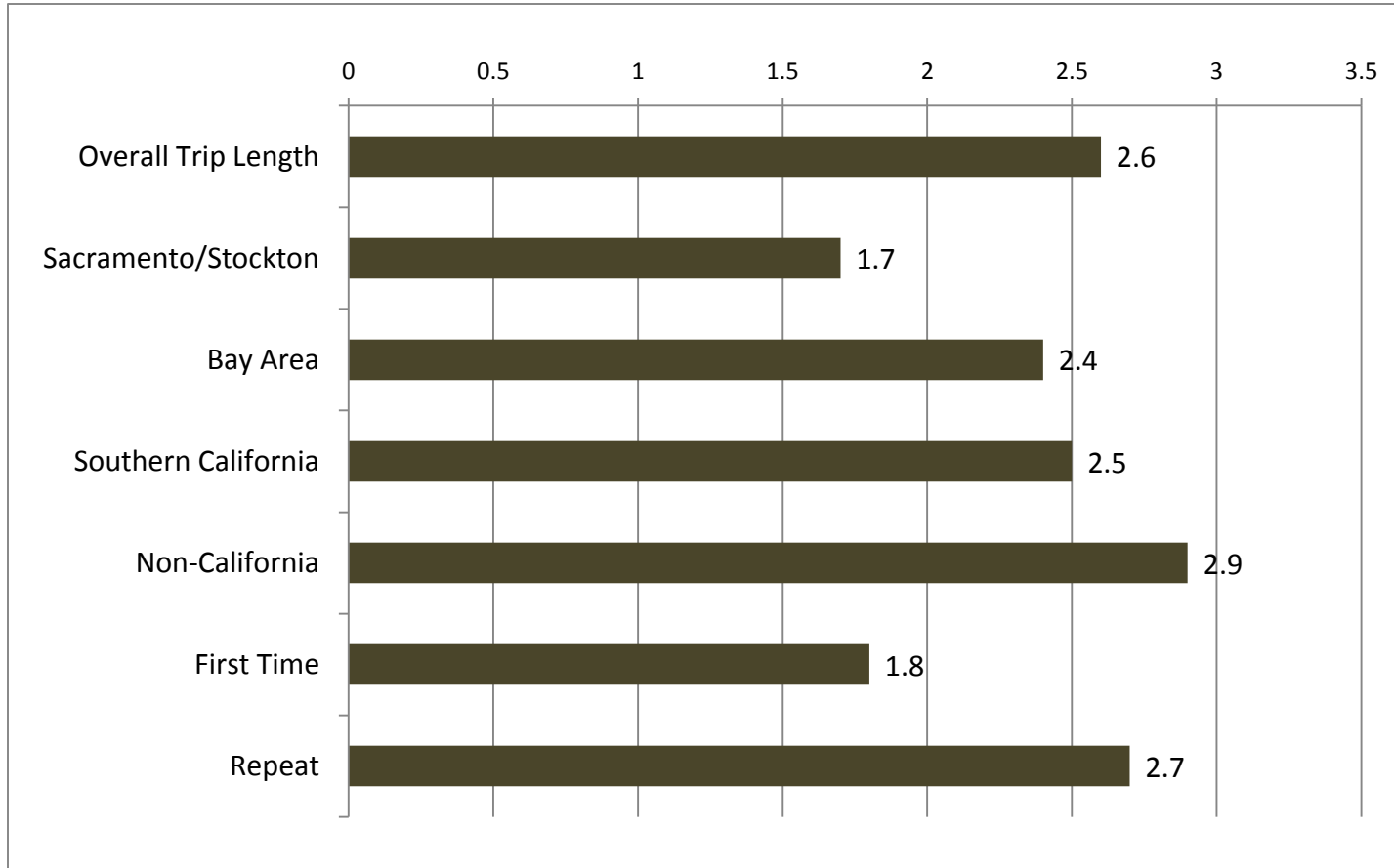
First Time vs. Repeat Visitor



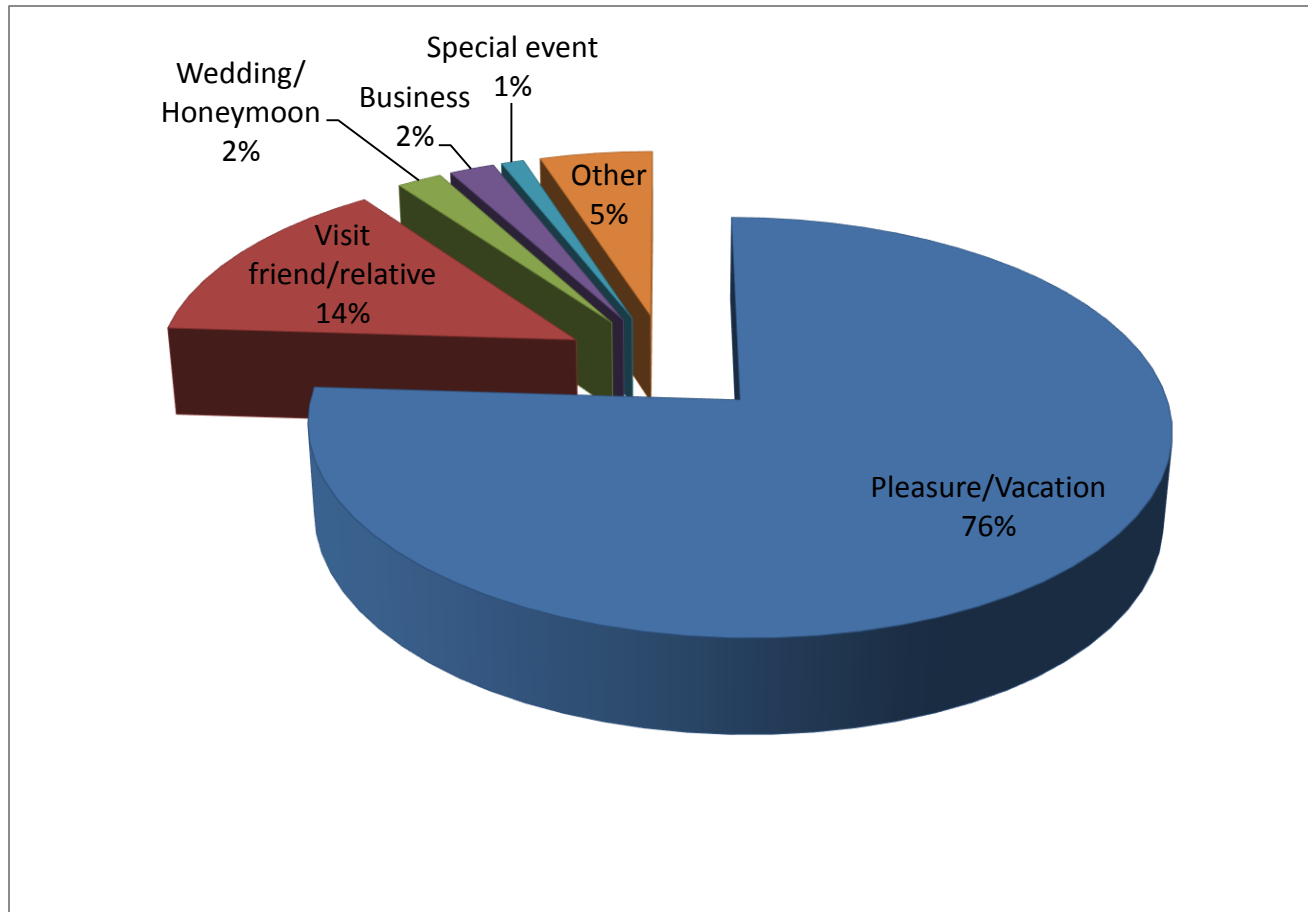
Trip Characteristics

- Trip Frequency 1.7
- Last 12 Months 1.0
- Party Size 2.6
- Length of Stay 2.6

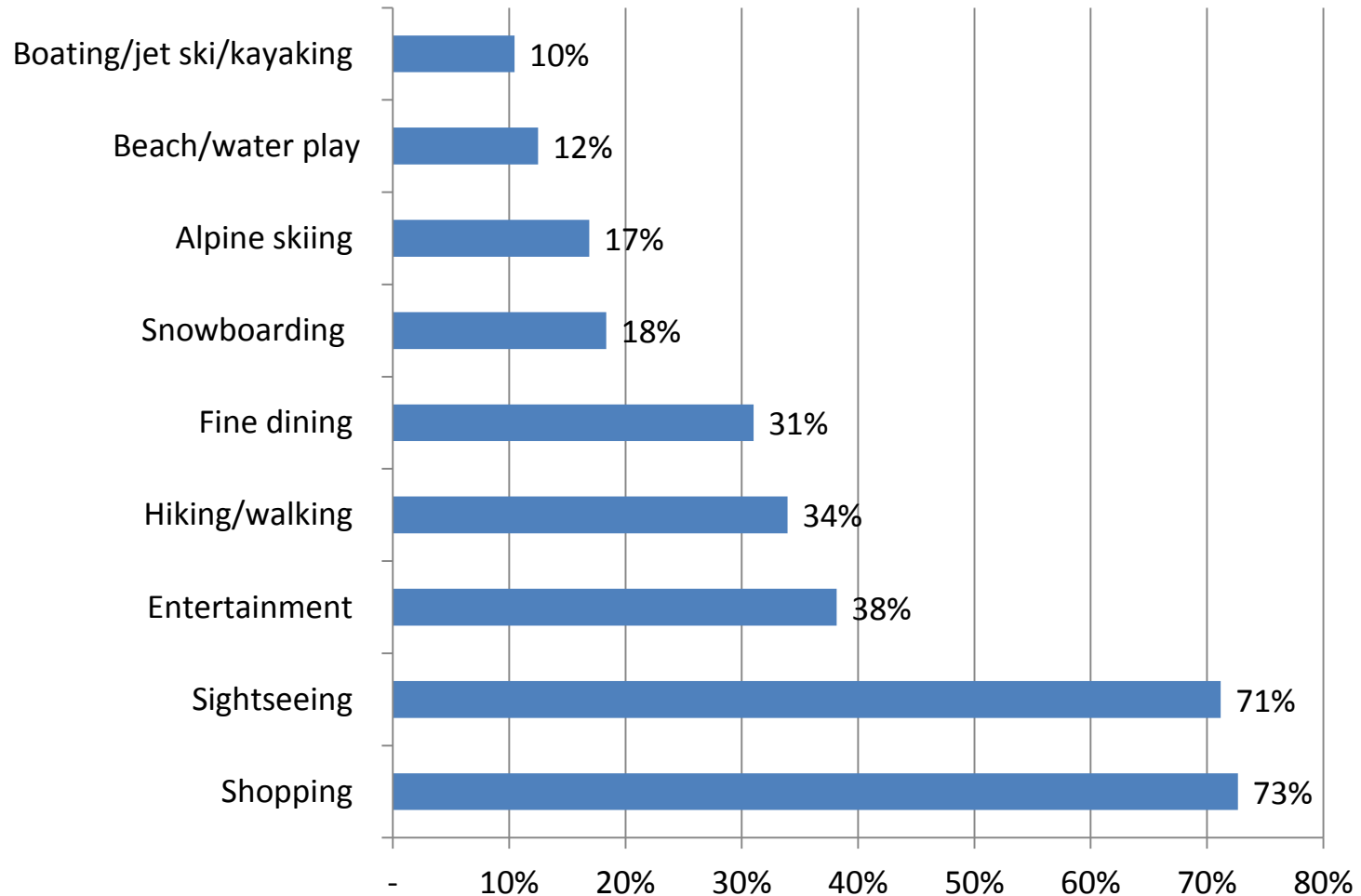
Length of Stay by Market



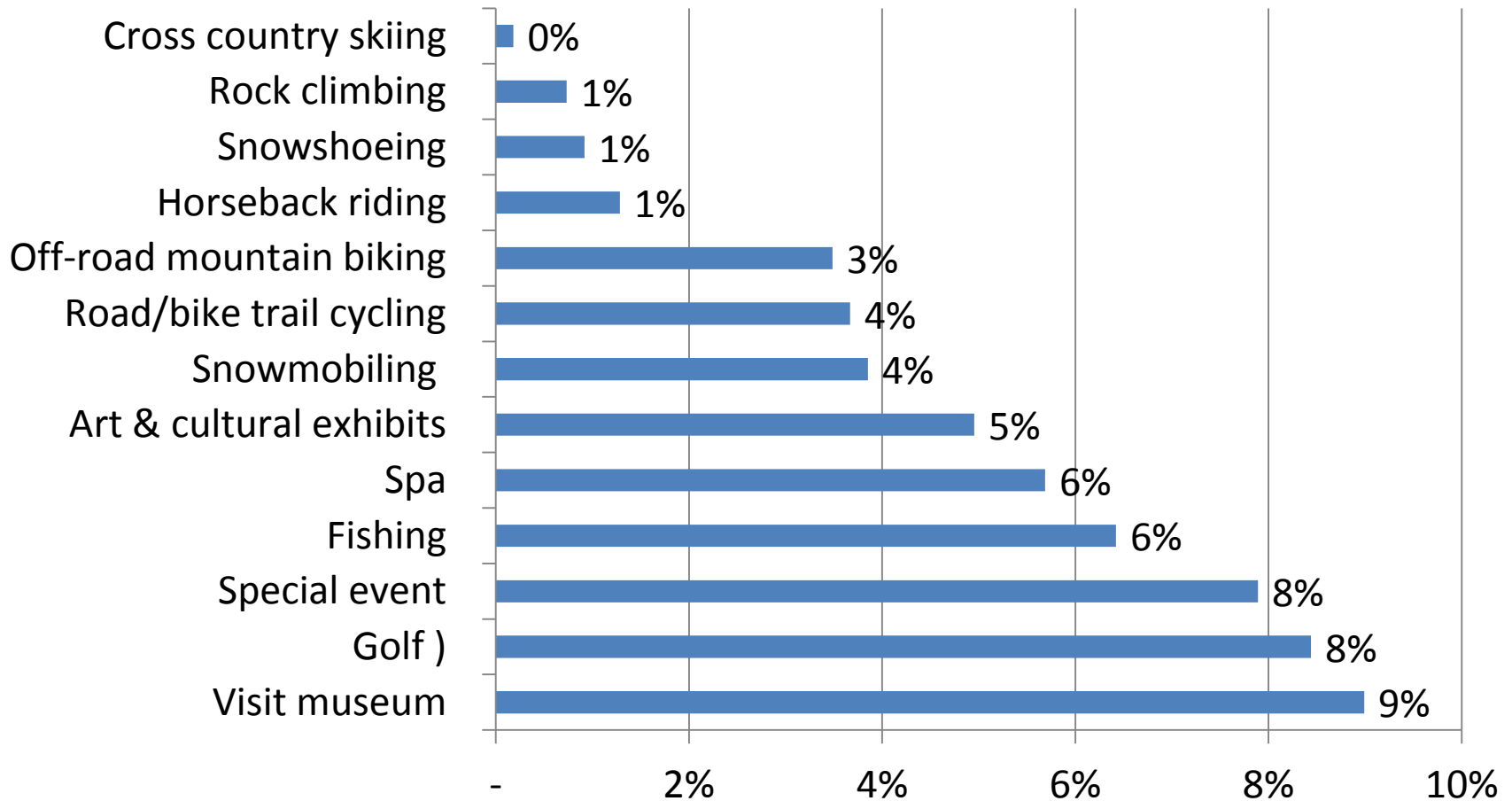
Primary Reason for Visiting



Activities (Top Ten)



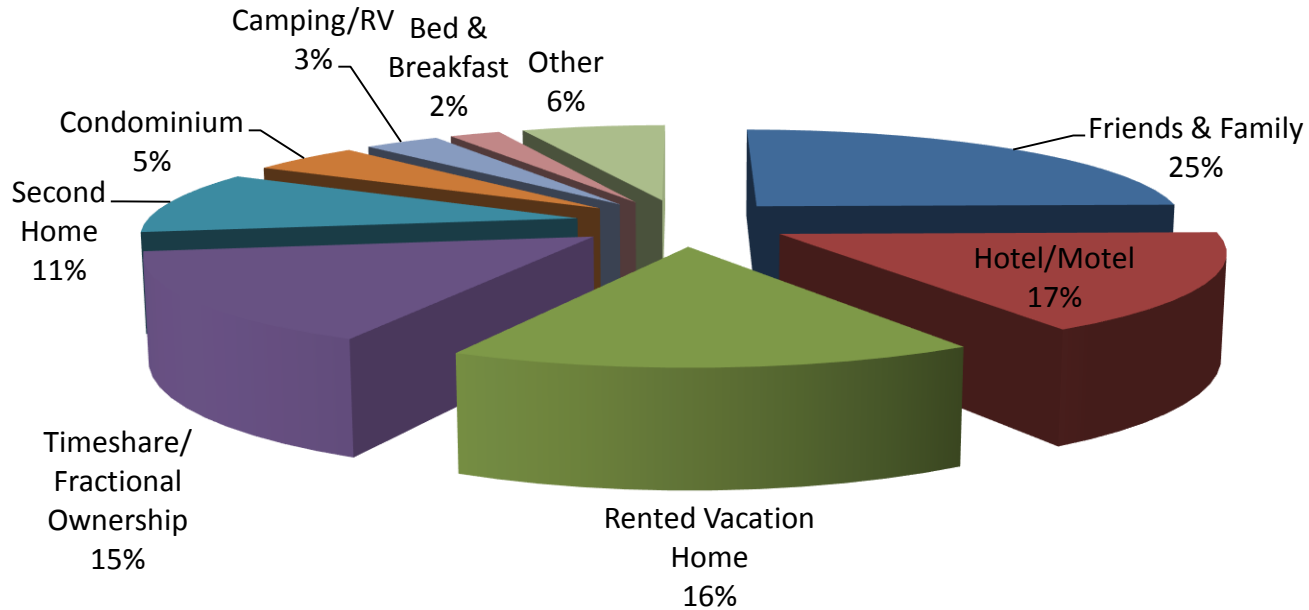
Activities (Bottom Ten)



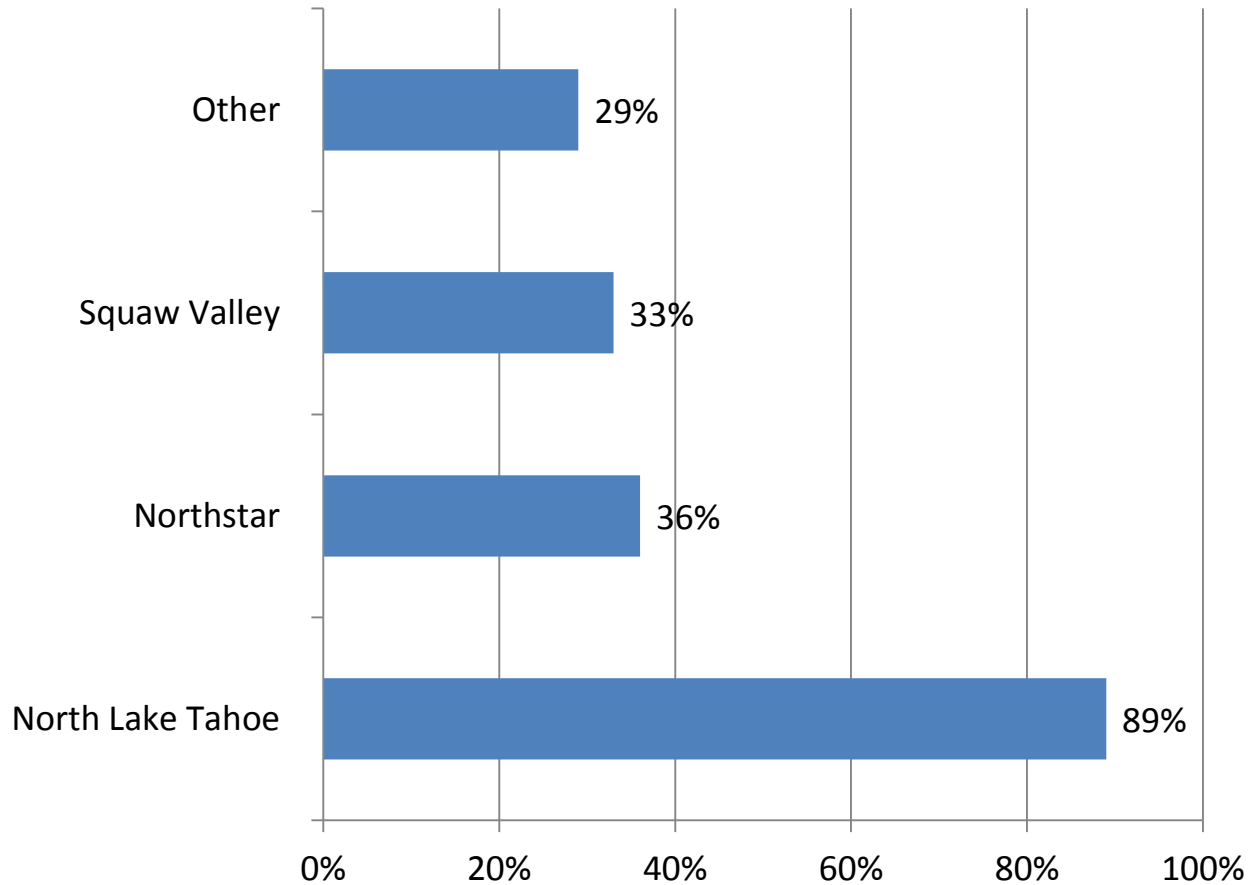
Special Events

- It's important to note that while only 1% indicated that special event was a primary reason for visiting, approximately 8% indicated it was an activity they participated in.

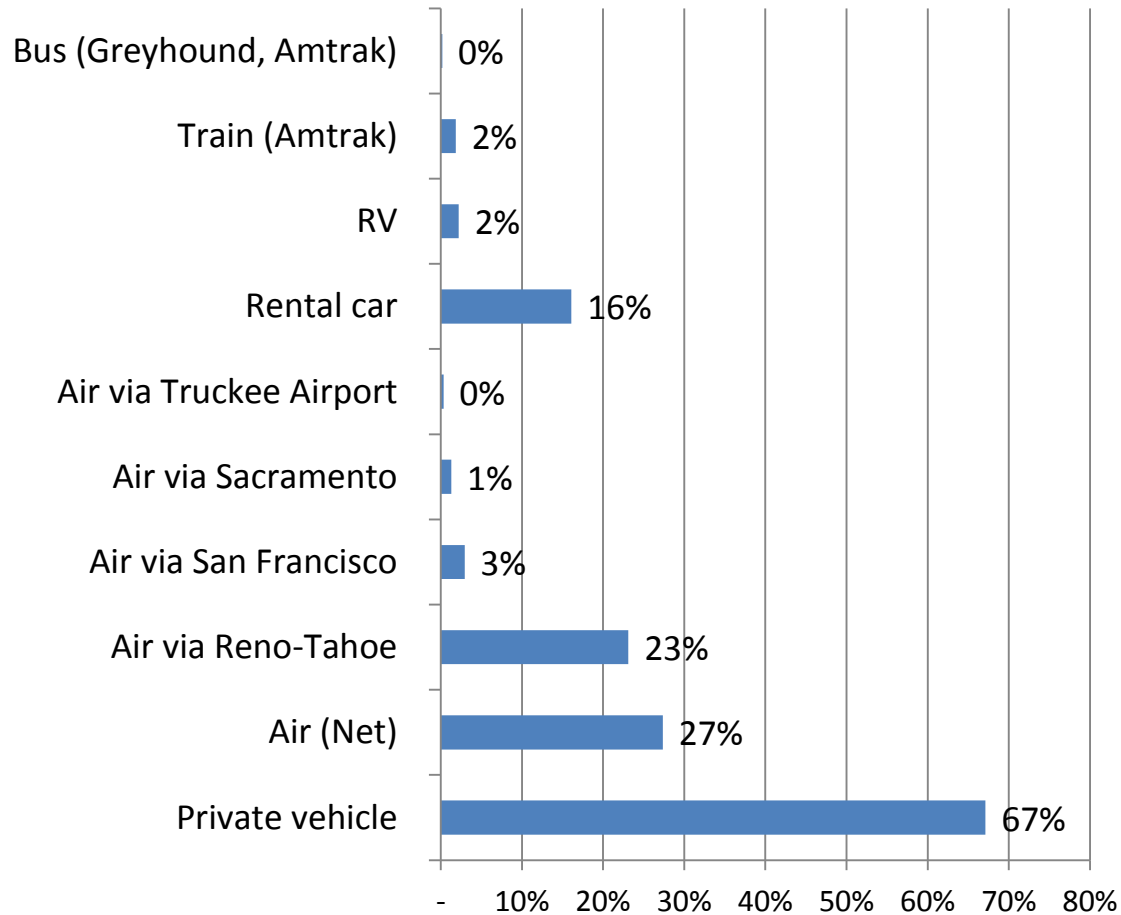
Type of Lodging



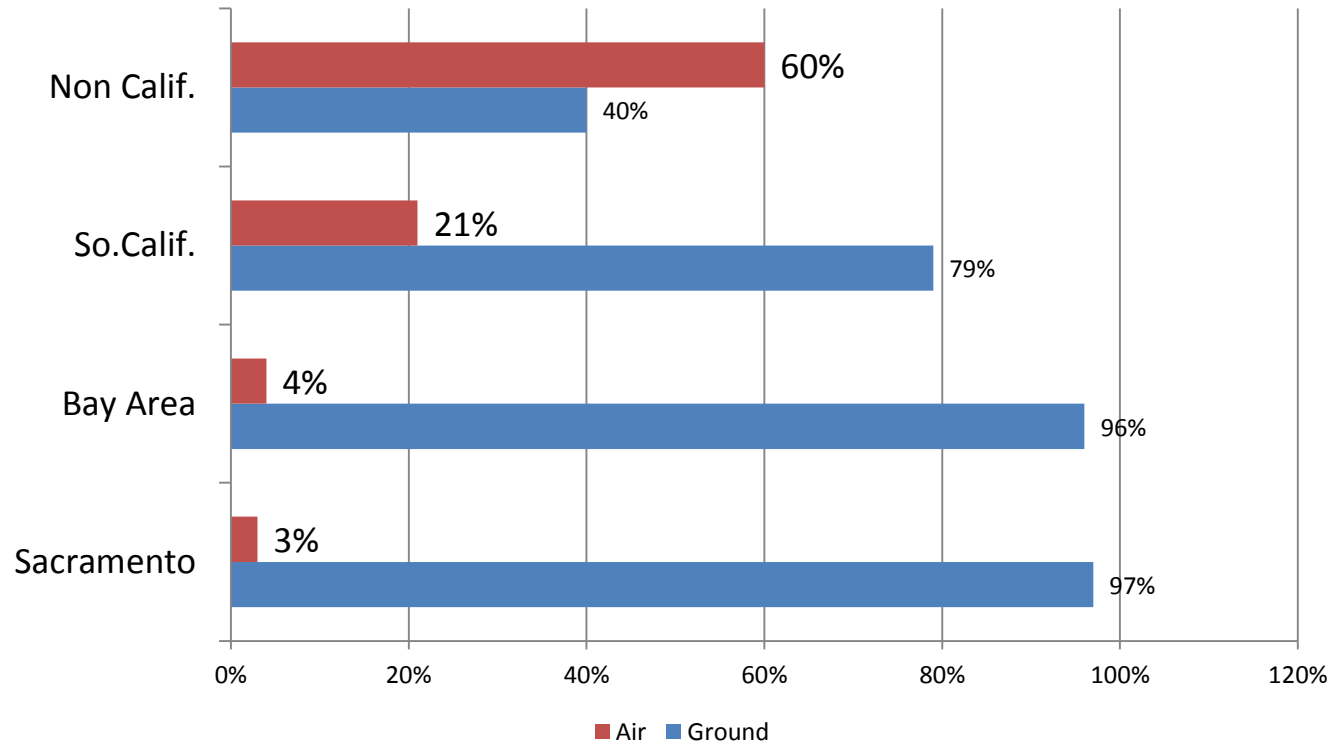
Places Visited on this Trip



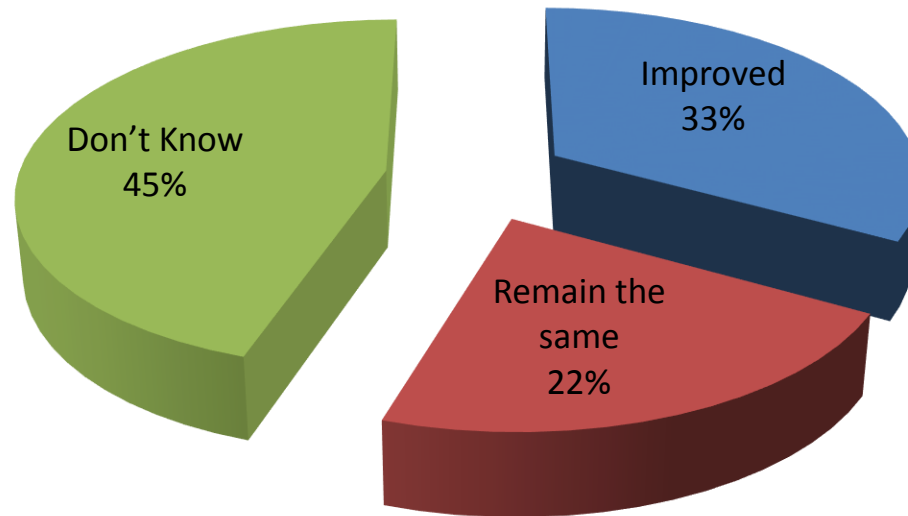
Primary Method of Travel to the Area



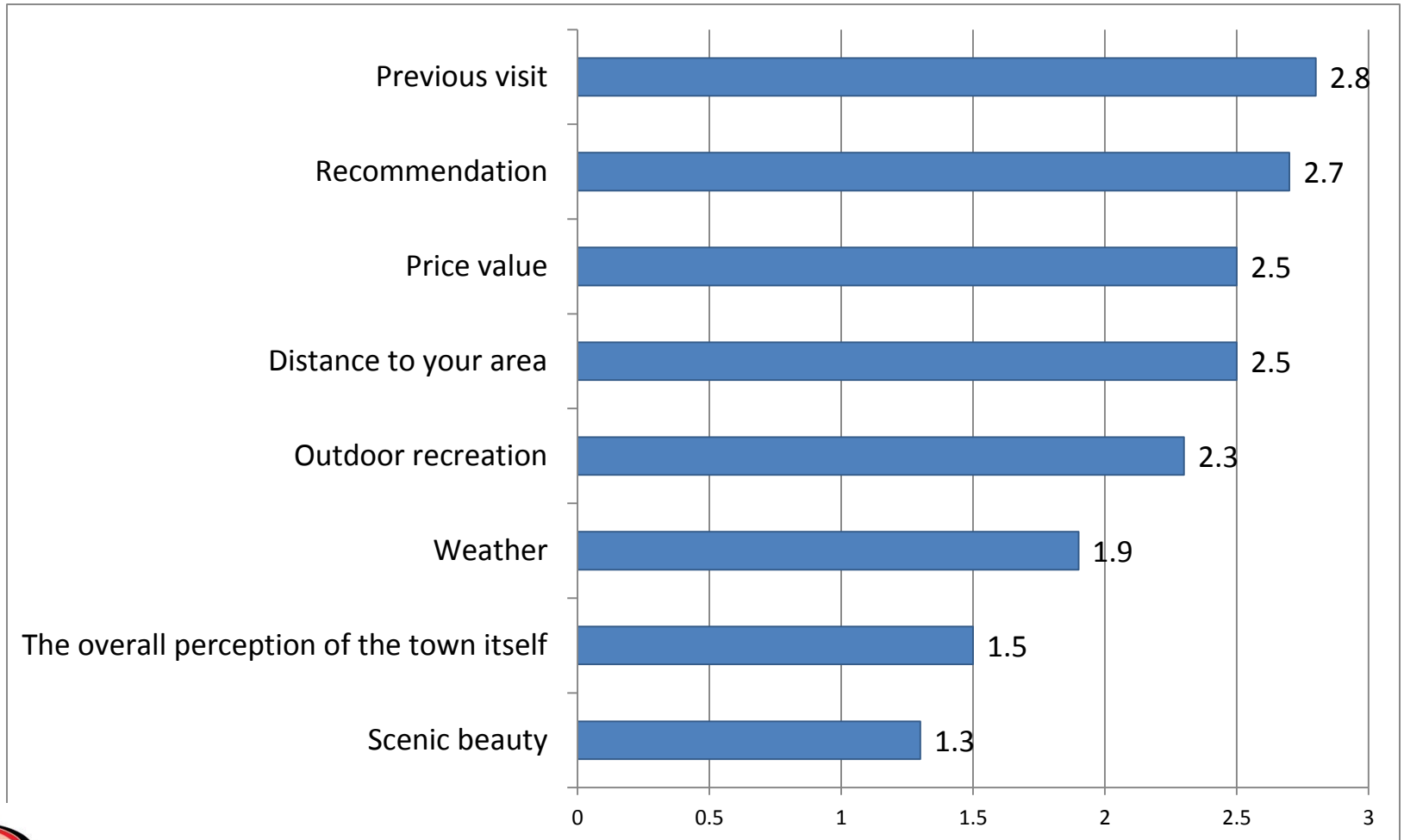
Method of Travel by Market



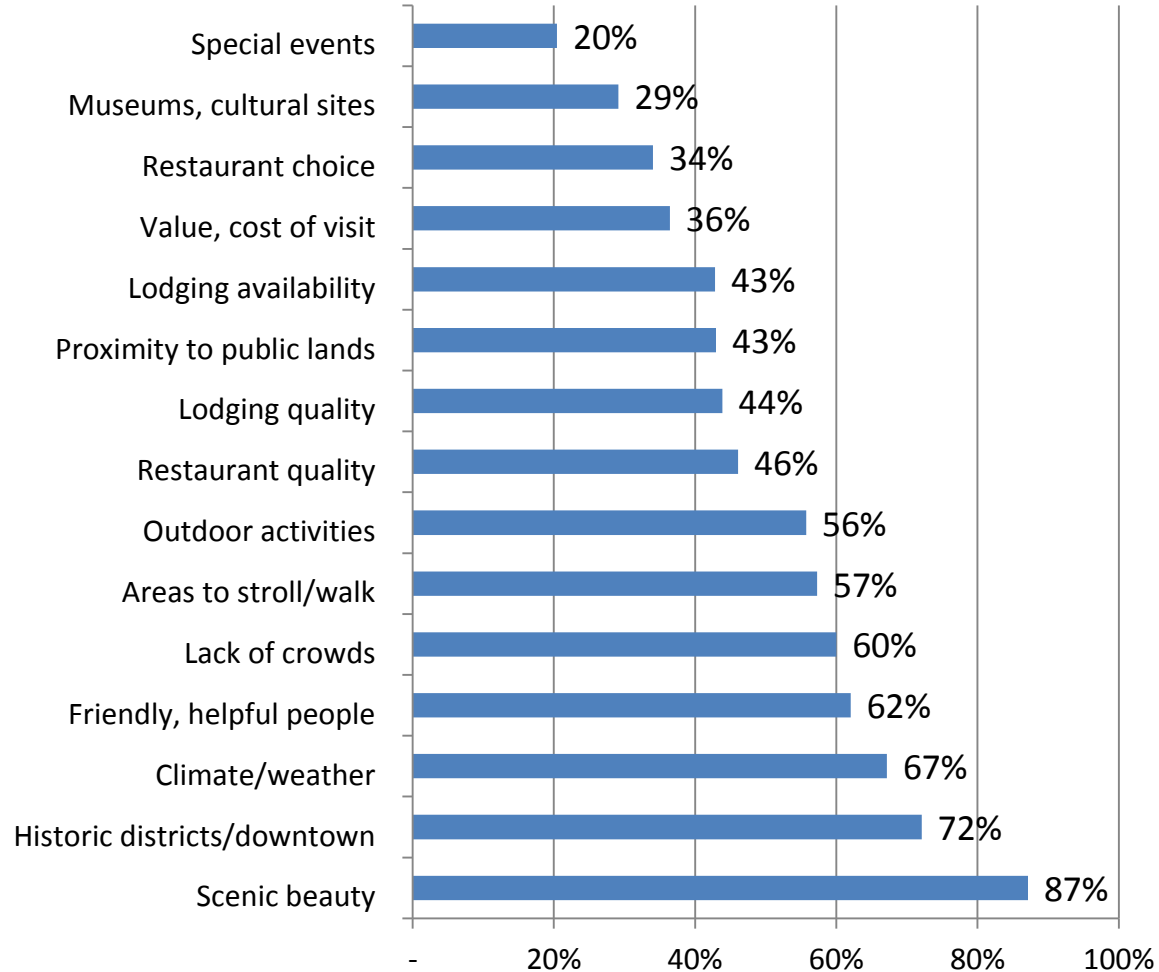
Perception of Truckee (Repeat visitors)



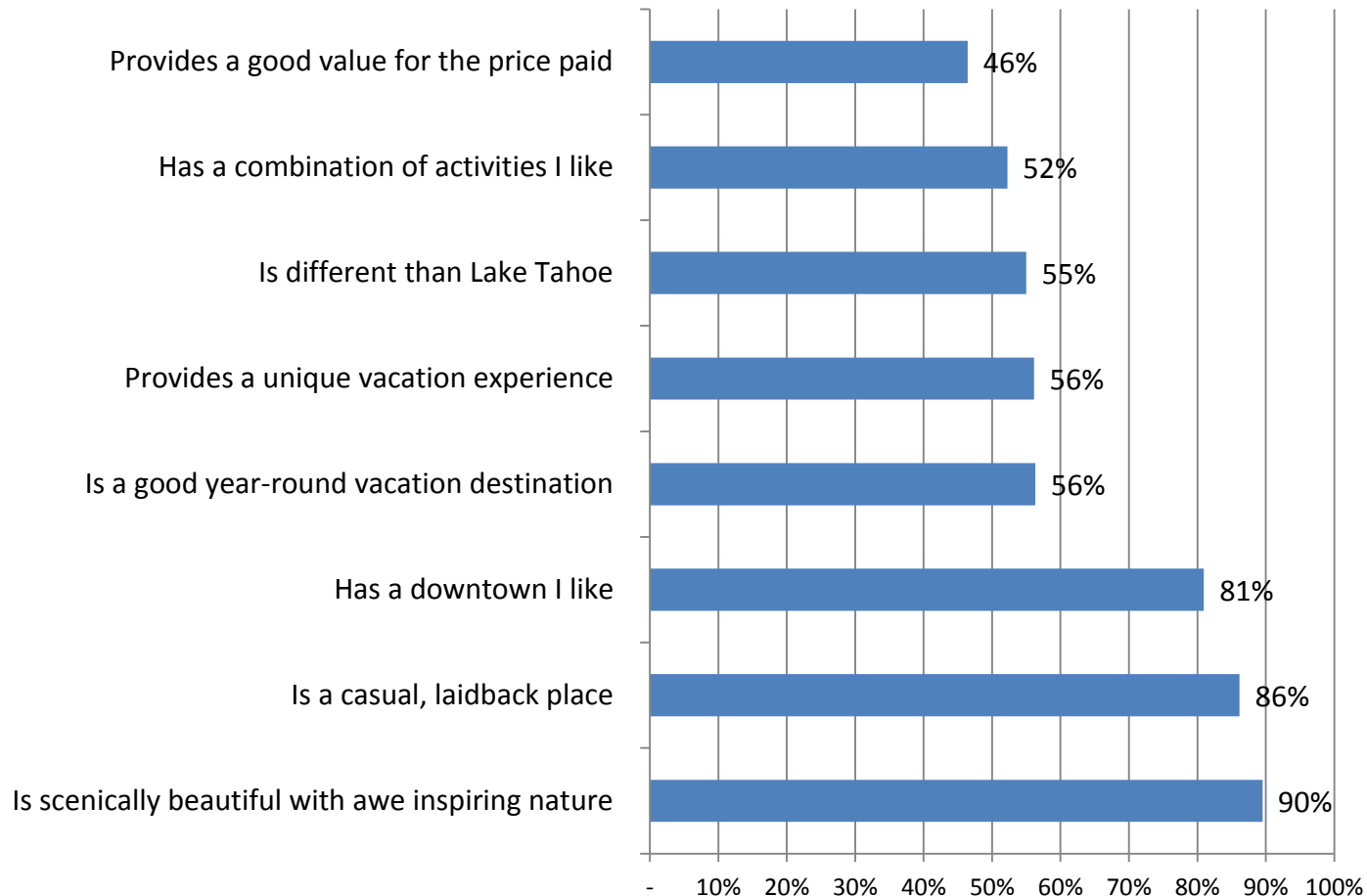
Destination Attribute Importance



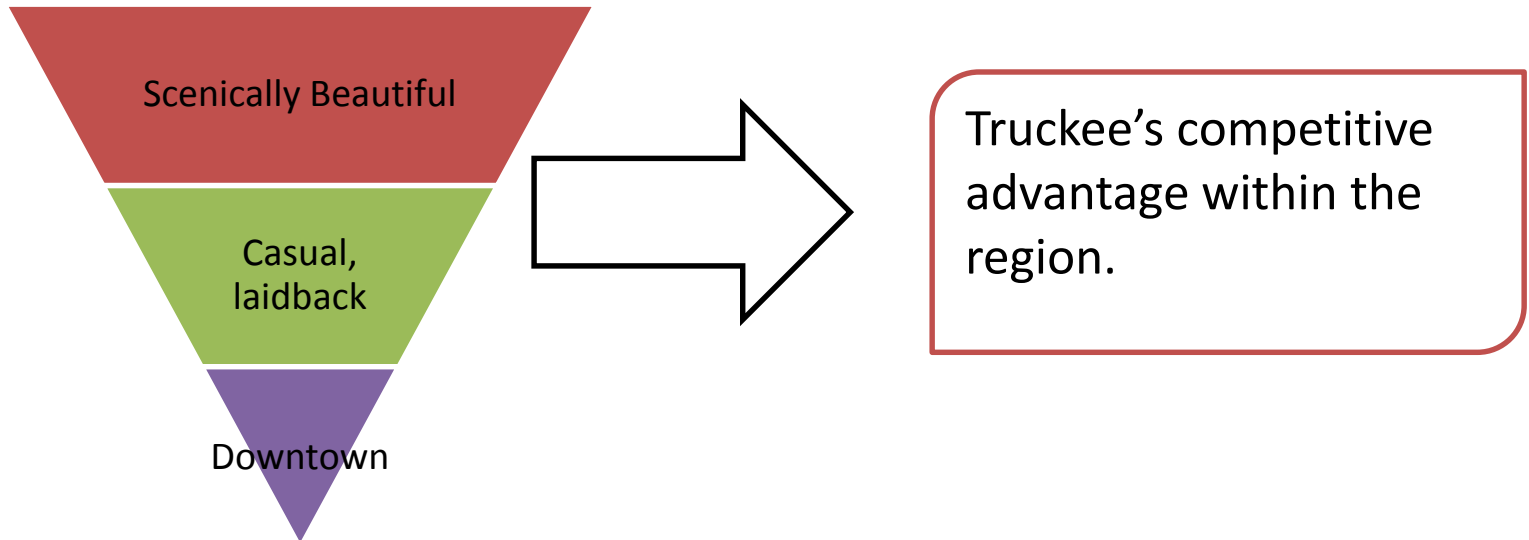
Attribute Rating



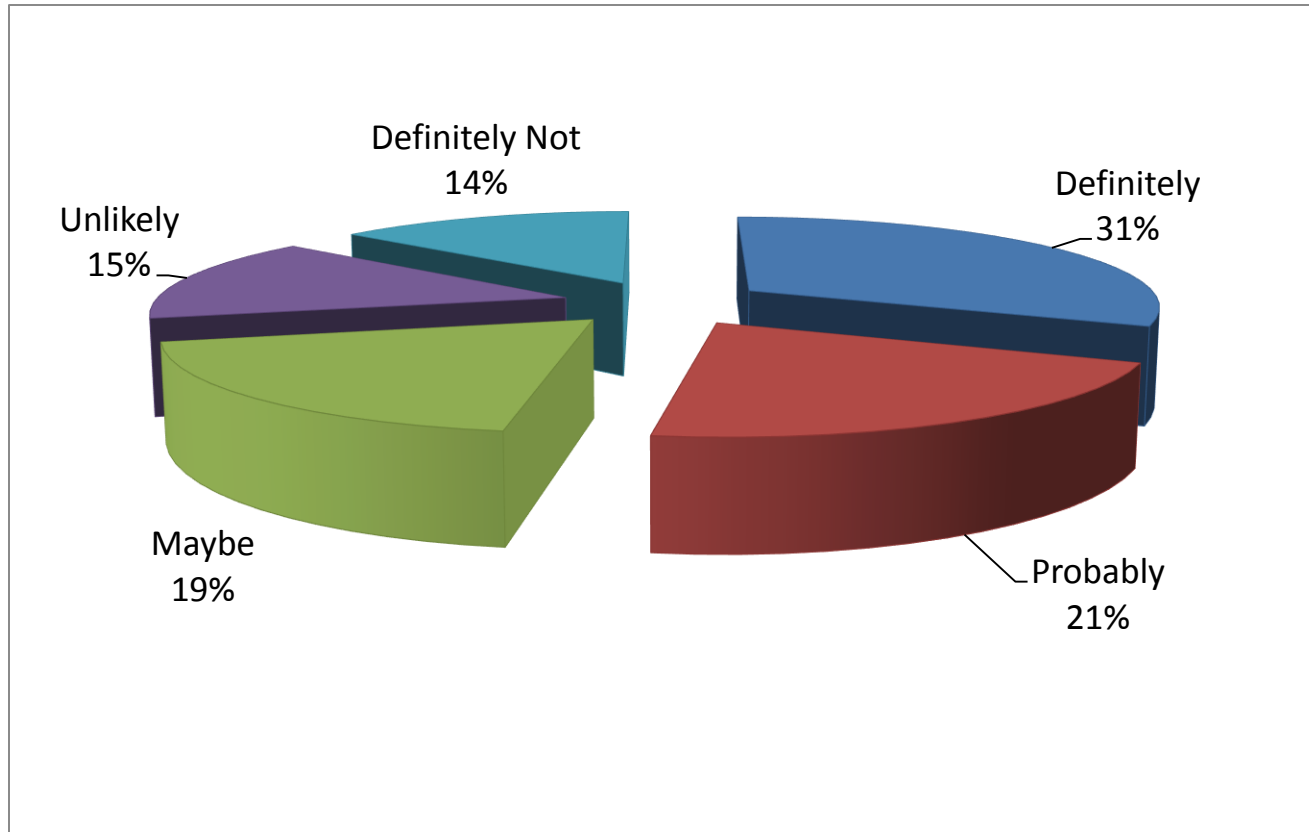
Perception/Agreement Statements



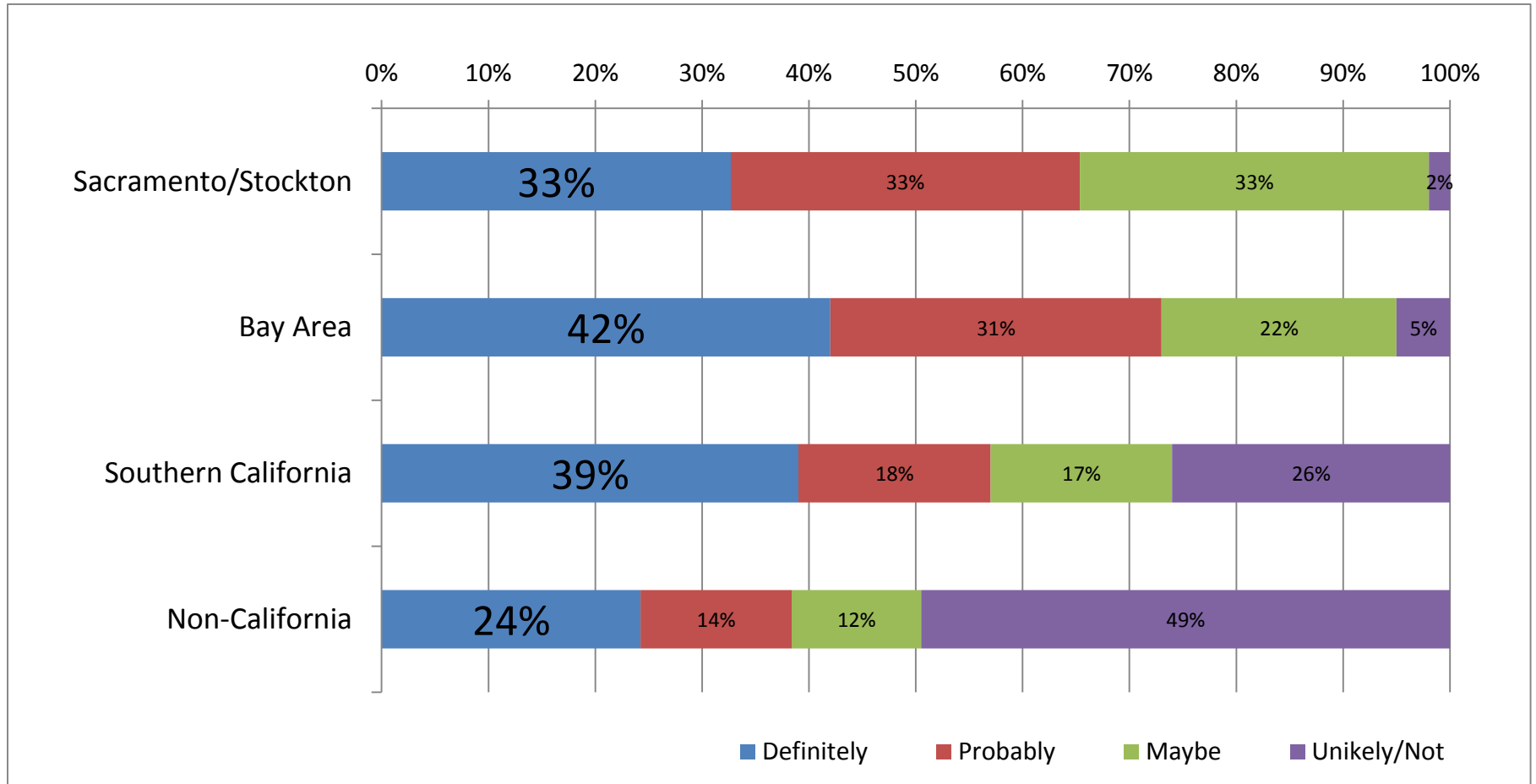
These are key elements that can be used to help build a competitive advantage for Truckee when competing for visitors.



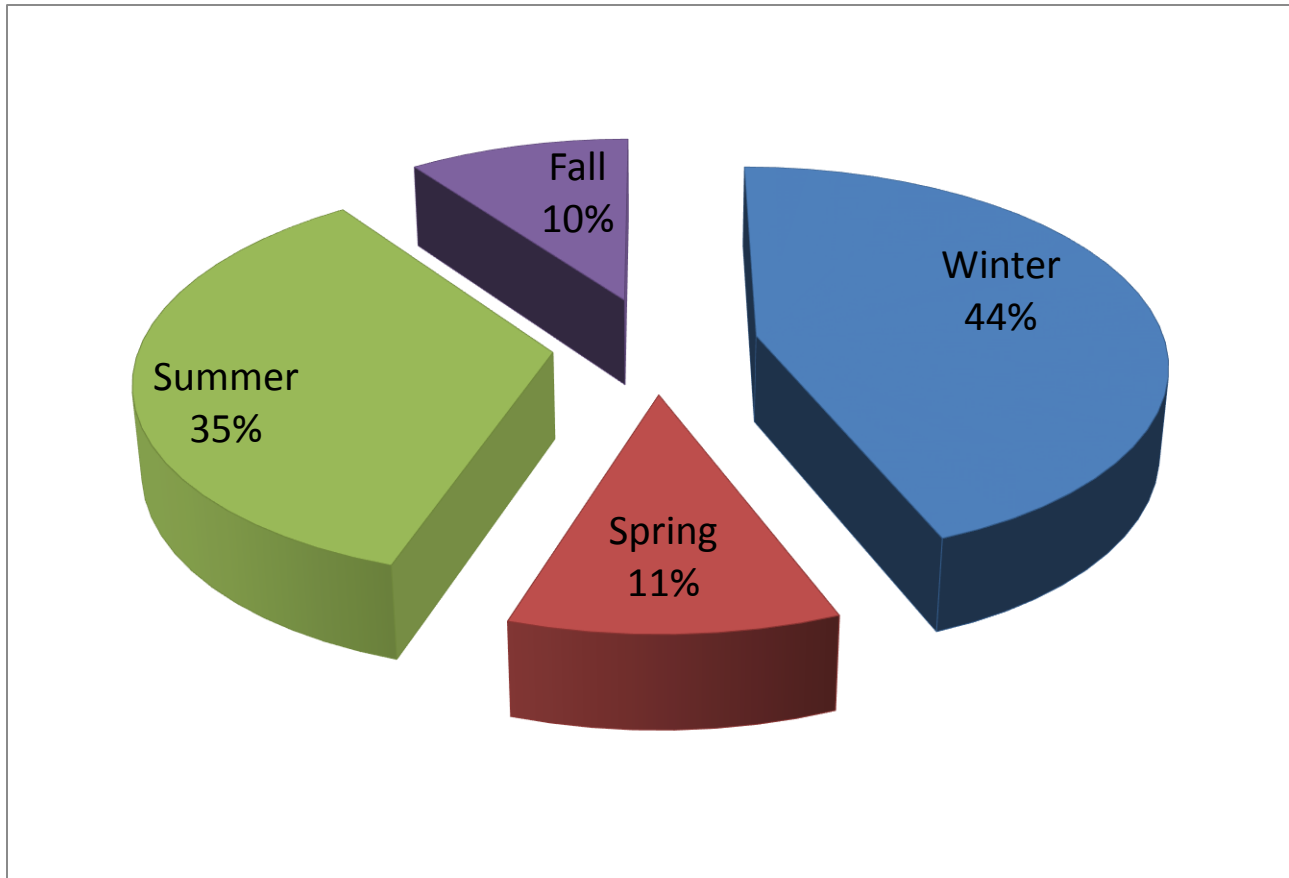
Likelihood your will return to Truckee Within 12 Months



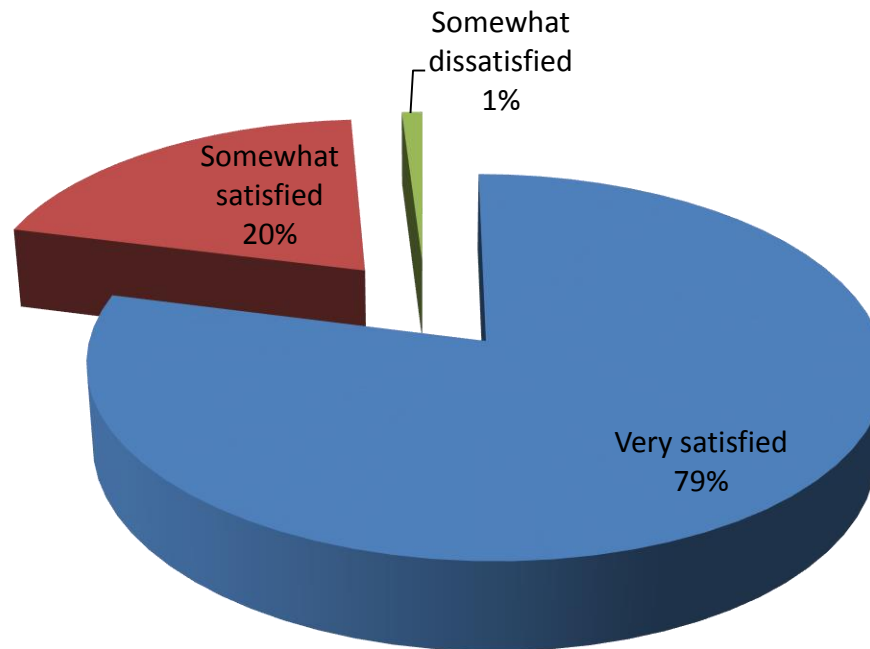
Likelihood your will return to Truckee Within 12 Months by Market



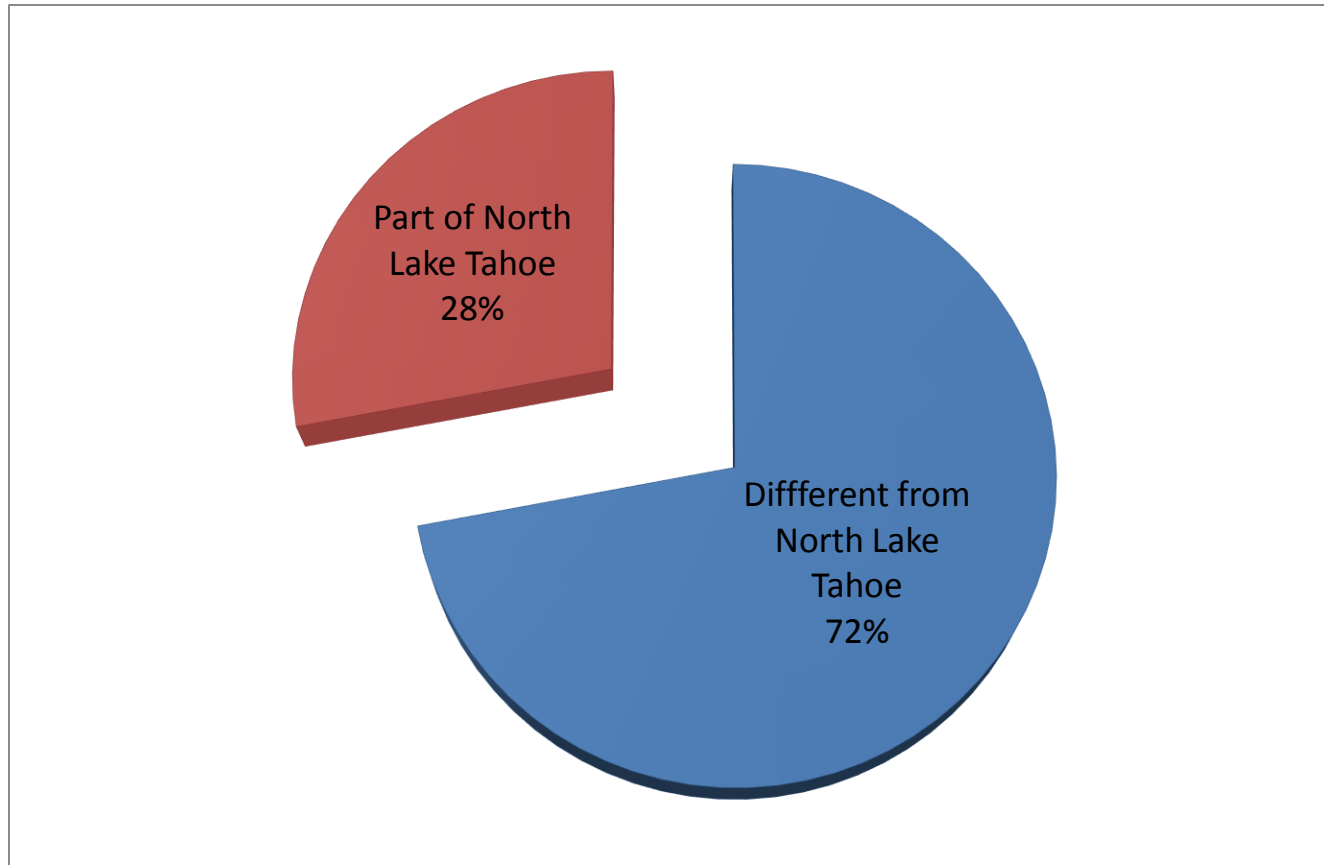
Season Most Likely To Visit



Trip Satisfaction



Perception of Truckee as Part of NLT



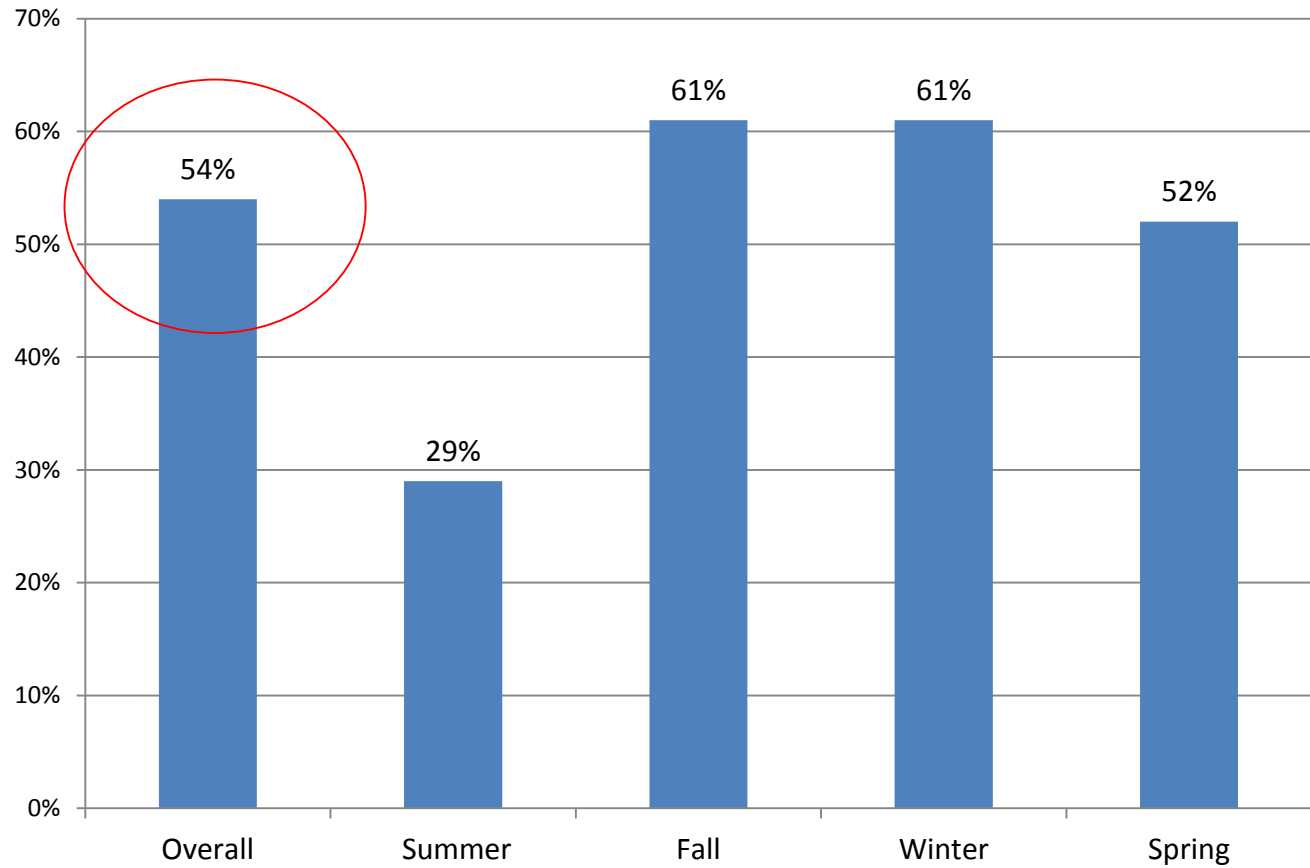
Net Promoter Score

- Promoters are those who respond with a score of 9 or 10 and are considered loyal enthusiasts. Detractors are those who respond with a score of 0 to 6 - unhappy customers. Scores of 7 and 8 are ignored. Net promoter score is calculated by subtracting the percentage of customers who are detractors from the percentage of customers who are promoters.*

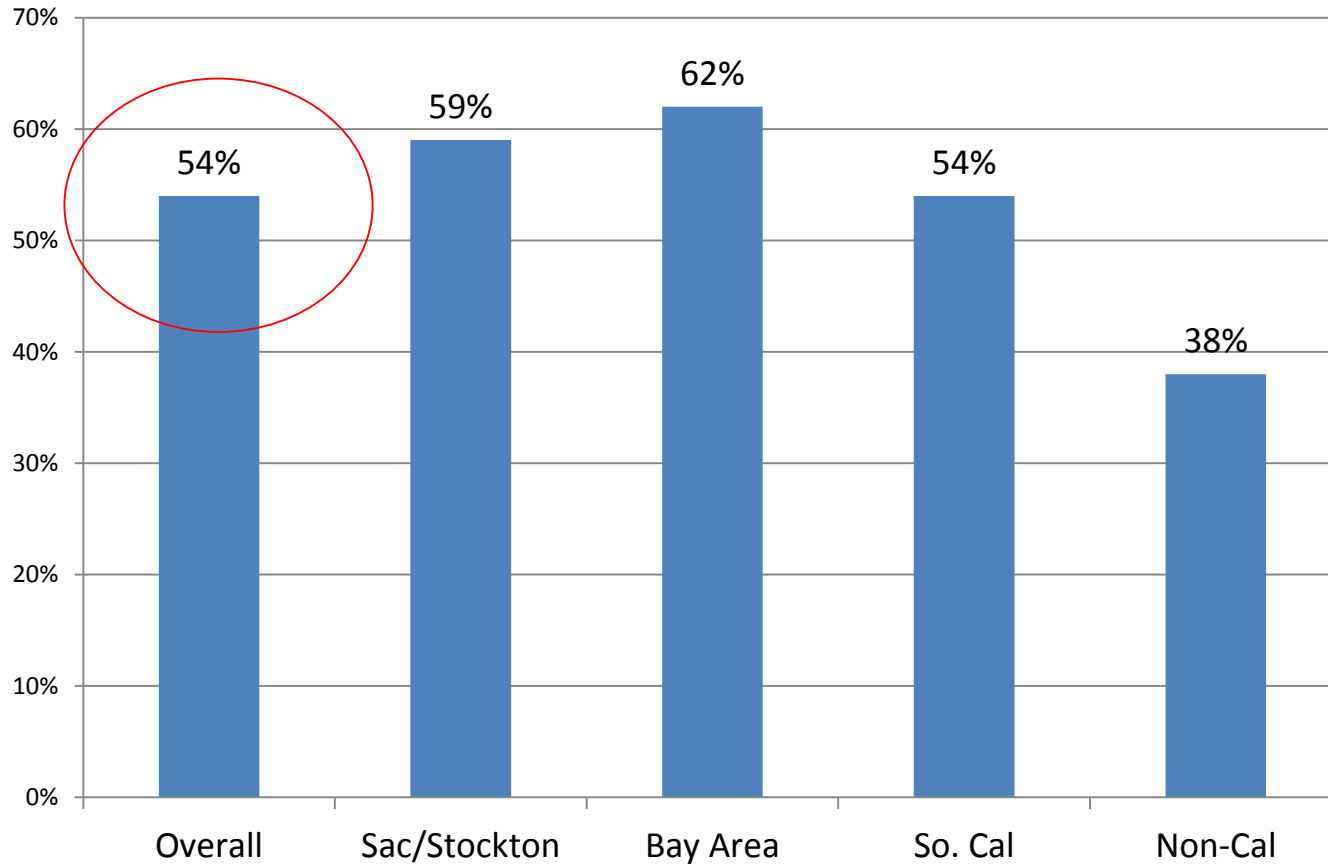
Why your Net Promoter Score is Important

- Relative measure of how strong your product experience is with your customer base.
- States of Change
 - Does your score go up over time/ Comp Set go down
 - Does your score go down over time/ Comp Set go down
 - Does your score go up over time/ Comp Set go up
 - Does your score go down over time/ Comp Set go up

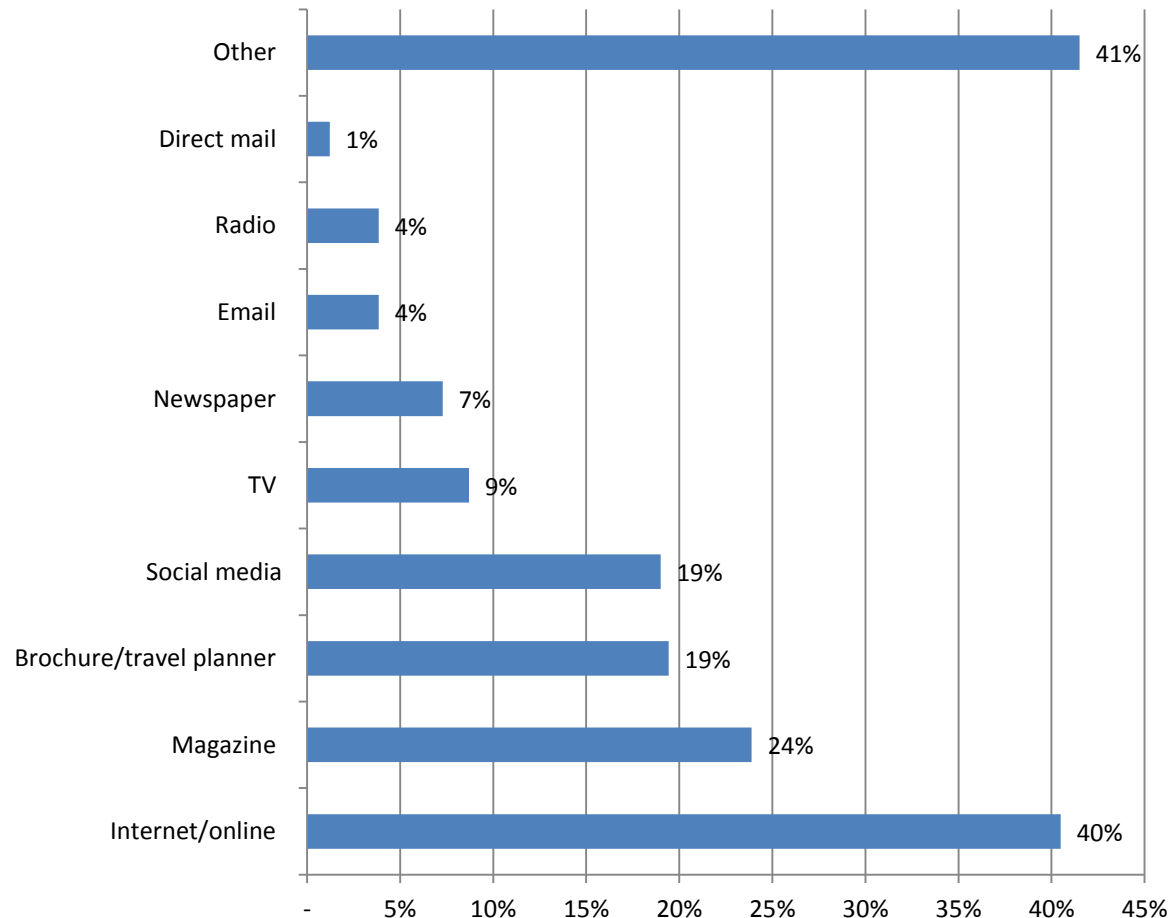
Net Promoter Score



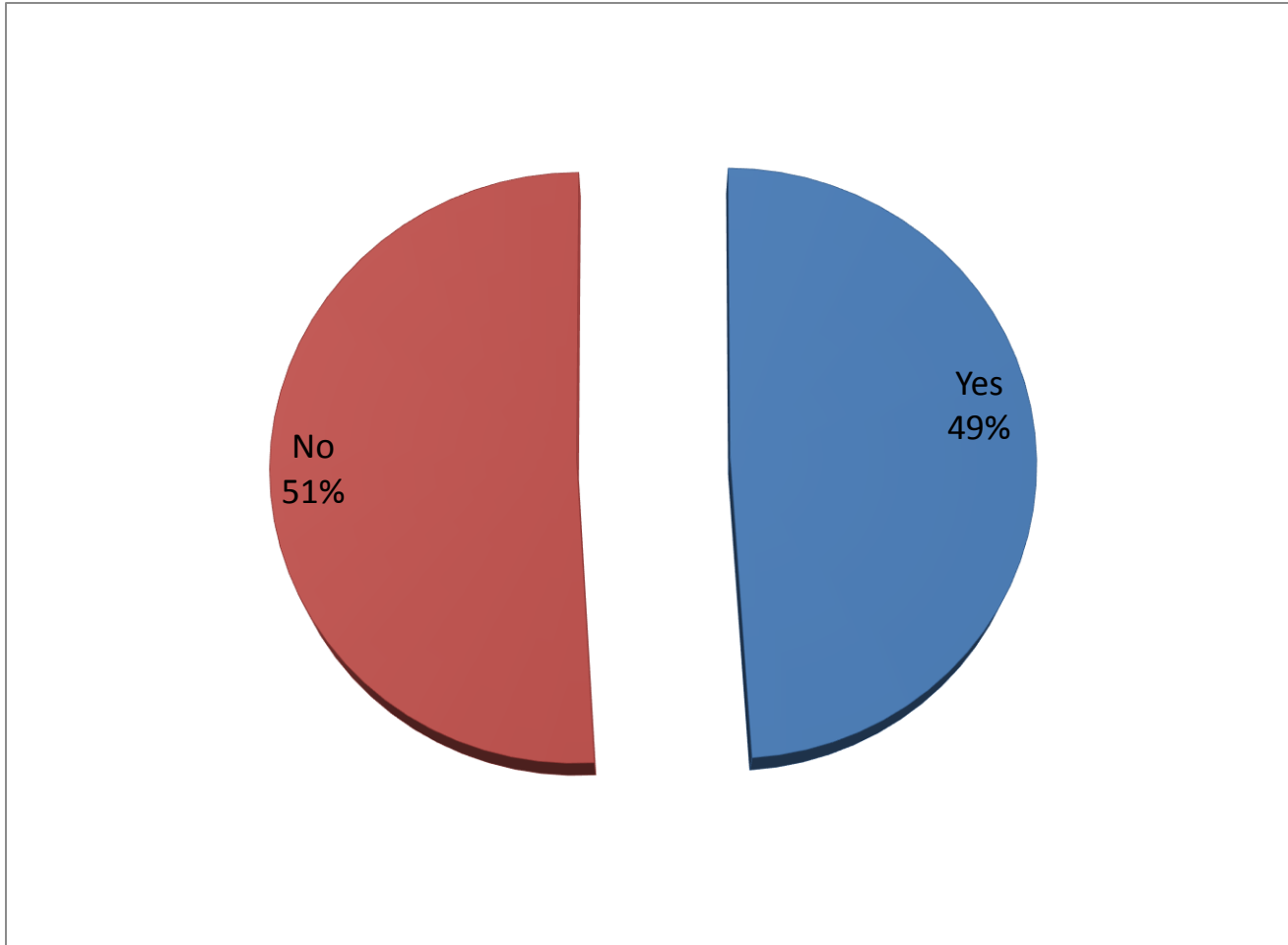
Net Promoter Score



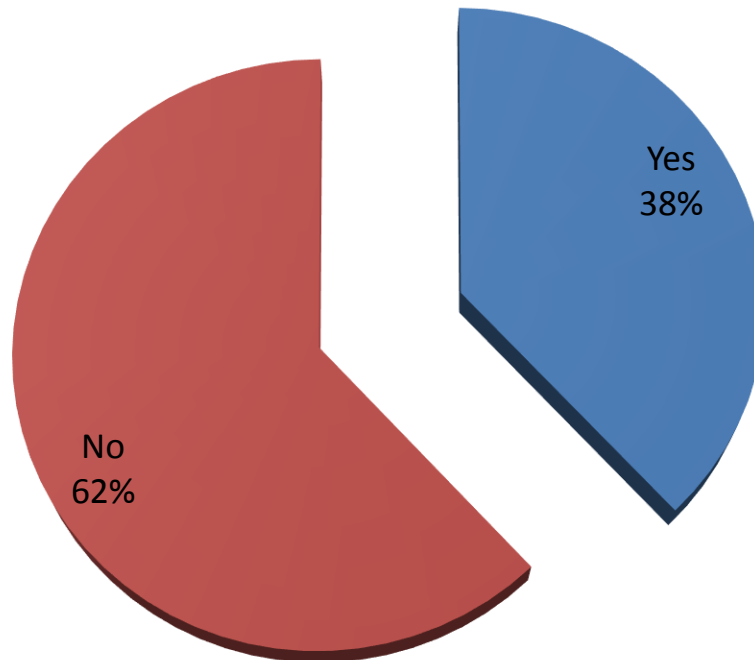
Seen or heard of Truckee in any of the following



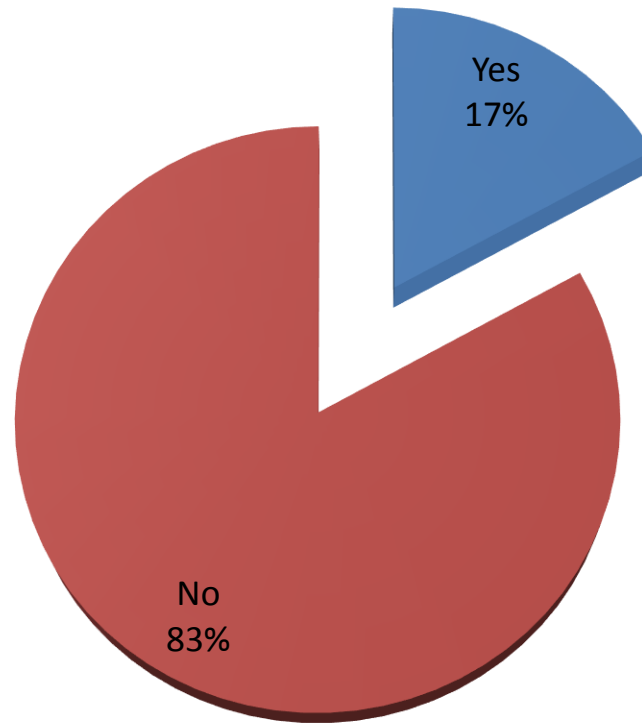
Did advertising Influence your decision to visit



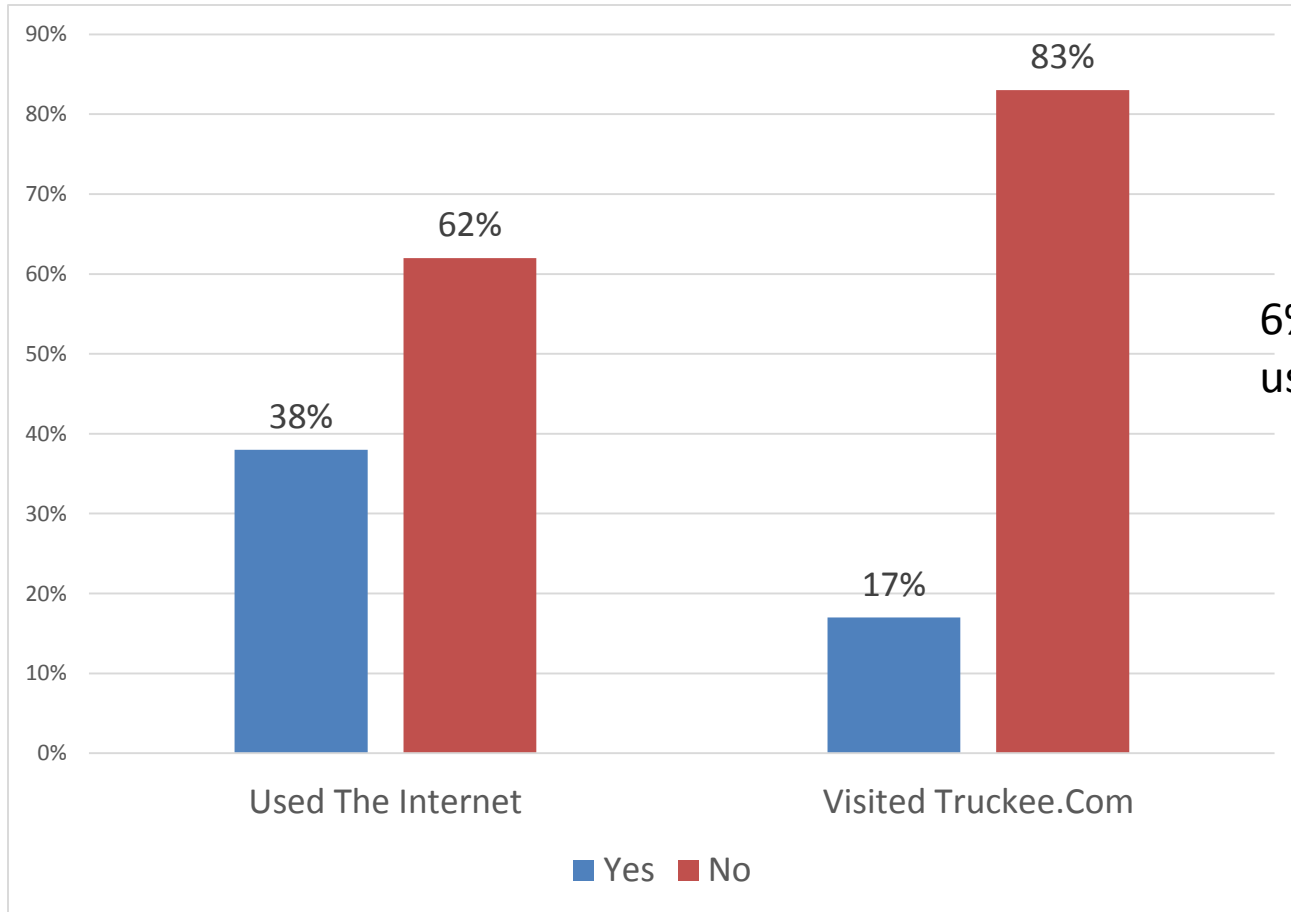
Use of Internet to plan or purchase any part of this trip



Use of Truckee.com



Use of Truckee.com



6% of visitors used truckee.com



Visitor Spending

	Number of People	Per person/Day Spending	Length of Stay	Travel Spending
Hotel	106,636	\$250	2	\$53,318,000
Fractional	45,618	\$393	2.6	\$46,612,472
Condo/Rental home	62,308	\$120	3.9	\$29,160,144
Second Home	31,154	\$437	3	\$40,842,894
Camping/RV	19,994	\$42	2.3	\$1,931,420
Friends and Families	43,987	\$265	2.4	\$27,975,732
Day Visitors	306,579	\$193	1	\$59,169,747
Other	25,590	\$241	2.3	\$14,184,537
Total	641,866			\$273,194,947

Insights

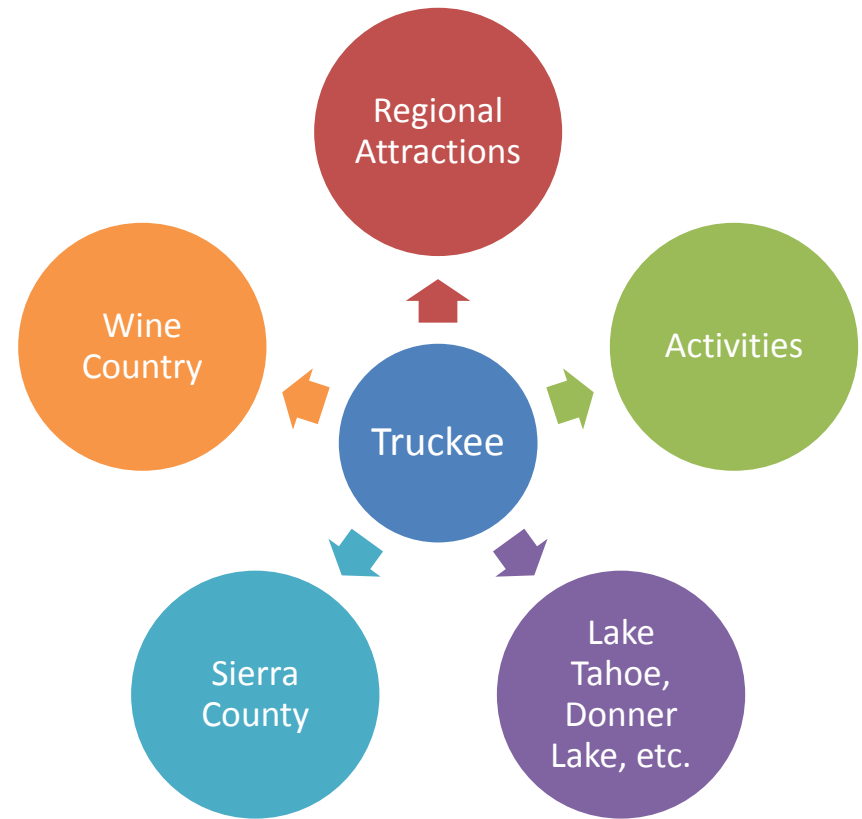
- **Visitor demand beyond winter sports**
 - What if these low natural snowfalls represent, in essence, “the new normal”? What if over a ten year period a significant number of years result in low natural snowfall? How will Truckee, and the greater Lake Tahoe area for that matter, manage its tourism based economy under this kind of change?

Insights

- **Truckee as a destination**
- For many within the destination Truckee has been viewed as part of a greater North Shore, and to a large extent that is true. It is also clear from the research that visitors view Truckee as a distinct and separate location within the greater region. This of course has a number of implications.

Insights

- **Truckee as a visitor hub**
- Position Truckee as a visitor hub for overnight stay, from which visitors can participate in a variety of activities and/or visit other places.



Insight

- **Truckee as an improving destination experience**
 - One of the key benefits that Truckee possesses over South Lake Tahoe, North Lake Tahoe, and Incline Village is its location outside the Tahoe basin. That location has allowed Truckee to improve the infrastructure and resulting tourism experience at a faster rate than those locations within the basin.

Insight

- **Vacation rental home segment surprises.**
 - Destinations lose sight of the impact that rental vacation homes can provide in the area's lodging inventory. The data indicates that those that use this lodging product provide a strong economic impact. This is important as new products like Airbnb and others provide new distribution channels for homeowners to make their property available to a wider network of potential visitors.