

# 2023 North Lake Tahoe Community Investment Priorities

*Highlights of a Community Survey Conducted January 14-29, 2023*



OPINION  
RESEARCH  
& STRATEGY



NORTH TAHOE  
**NTCA**  
COMMUNITY ALLIANCE

## Introduction of Subject Matter Experts

- ✓ The team of Lew Edwards Group (LEG) and FM3 Research (FM3) has served our Community Alliance and Placer County for years:
- ✓ LEG/FM3 was the team retained by North Lake Tahoe Resort Association and the County to assist with the Measure A reauthorizations in 2011 & 2012
- ✓ Together, this team has enacted local funding for many jurisdictions like ours, and executed outstanding public opinion research and community outreach programs to assess public viewpoints and engage stakeholders



# Project Objectives

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In a dynamic communications and quality of life setting, our team was asked to conduct a statistically valid public opinion research study to:

Identify the public's priorities for funding within the North Lake Tahoe footprint

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Understand how the community views current program investments, and ranks future needs

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With COVID receding to an endemic way of life, understand how tourism and the state of the local economy are currently viewed

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# Survey Specifics and Methodology

|                                 |  |
|---------------------------------|--|
| <b>Dates</b>                    | January 14-29, 2023  |
| <b>Survey Type</b>              | Dual-mode Resident Survey  |
| <b>Research Population</b>      | Adult North Lake Tahoe Residents   |
| <b>Total Interviews</b>         | 400  |
| <b>Margin of Sampling Error</b> | (Full Sample) $\pm 4.9\%$ at the 95% Confidence Level  |
| <b>Contact Methods</b>          |  Telephone Calls  Email Invitations  Text Invitations |
| <b>Data Collection Modes</b>    |  Telephone Interviews  Online Interviews   |

*(Note: Not All Results Will Sum to 100% Due to Rounding)*

# Presentation Contents

| Section                                 | Description  |
|---|--|
| Impressions of Life in North Lake Tahoe | <ul style="list-style-type: none"><li>• General views of life in North Lake Tahoe</li><li>• The impact of tourism.</li></ul>   |
| Views on Publicly Funded Projects       | <ul style="list-style-type: none"><li>• Views on recently implemented pilot programs</li><li>• Thoughts on how to prioritize future public investment</li><li>• Confronting tradeoffs between select priorities.</li></ul> |
| Conclusions                             |  |

# A Note about Comparisons to Prior Surveys

This survey was of residents, including voters and non-voters, alike.

All of the prior surveys were conducted among voters.

Consequently, comparisons should take that population difference into account.

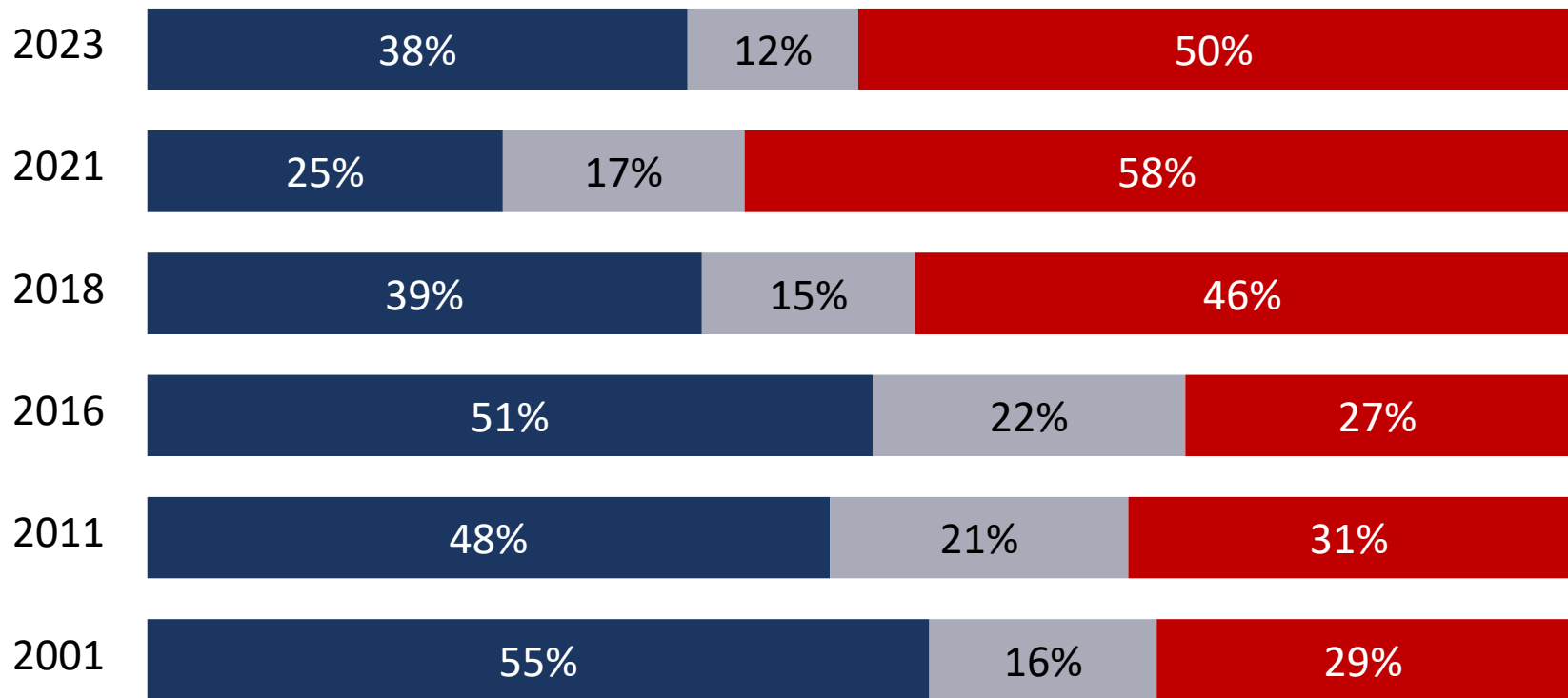


# **Impressions of Life in North Lake Tahoe**

# General attitudes about the region more closely resemble 2018 than the more pessimistic 2021.

*Thinking about the way things are going in the North Lake Tahoe area right now, would you say they are going in the right direction, or are they on the wrong track?*

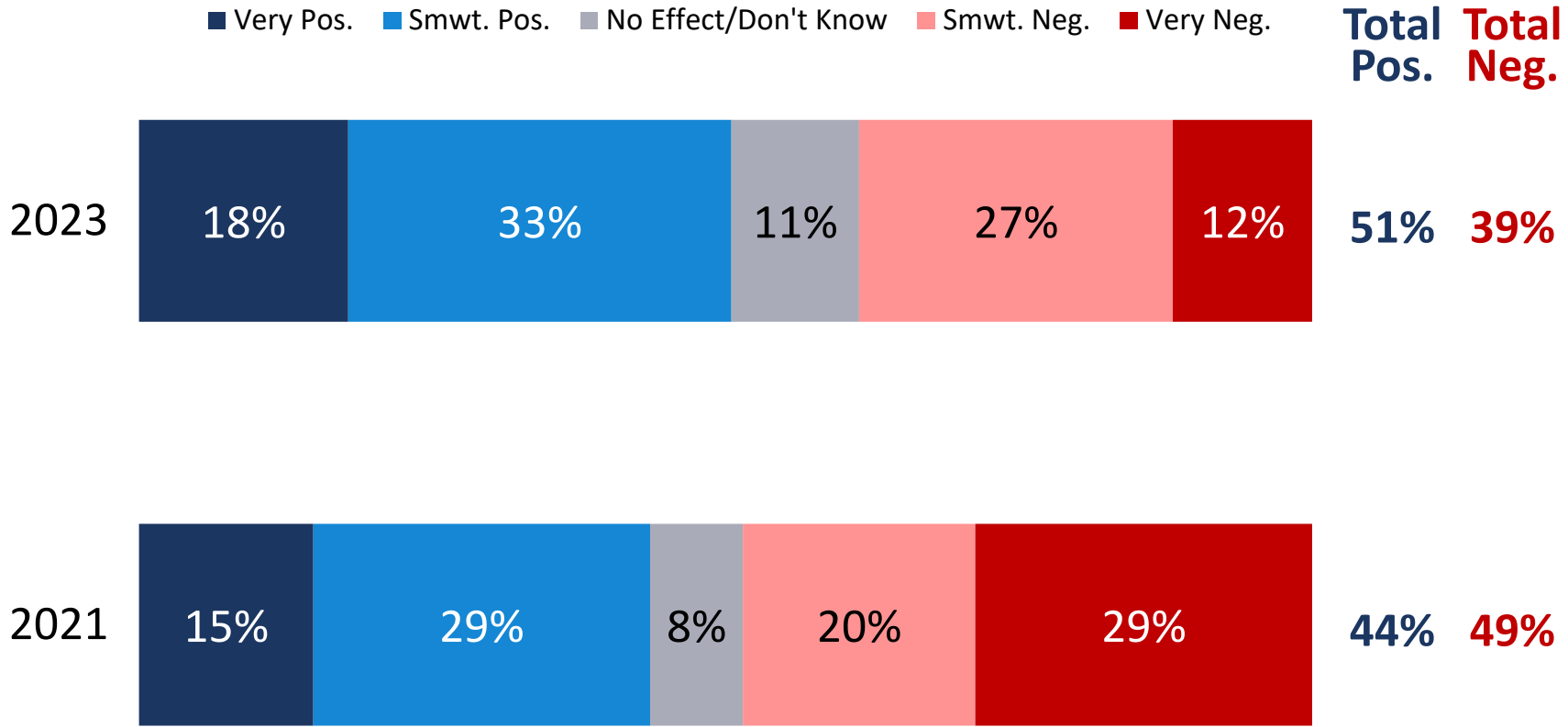
■ Right Direction ■ Don't Know ■ Wrong Track





# Residents in 2023 feel better about the quality-of-life impacts of tourism than voters did in 2021.

*The Impact of Tourism on the overall quality of life*

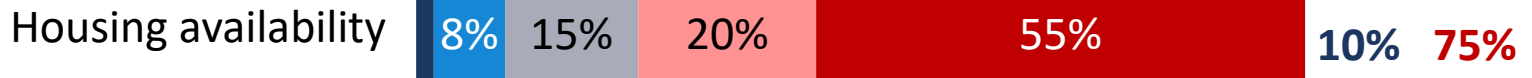


Q: I am going to read you a list of different aspects of life in North Lake Tahoe. Please tell me whether you feel that (SPLIT SAMPLE A: tourism) (SPLIT SAMPLE B: the tourism industry) has a positive effect, no effect, or a negative effect on that aspect of life in the County. Tracking Comparisons are Not Direct Due to Surveying a Different Population in Previous Surveys; Different Wording Used in Previous Survey

# The local impacts of tourism are seen as varied.

I am going to read you a list of different aspects of life in North Lake Tahoe. Please tell me whether you feel that **(SPLIT SAMPLE A: tourism)** **(SPLIT SAMPLE B: the tourism industry)** has a positive effect, no effect, or a negative effect on that aspect of life in the County.

■ Very Pos.
■ Smwt. Pos.
■ No Effect/Don't Know
■ Smwt. Neg.
■ Very Neg.
Total Pos.
Total Neg.



# Residents don't significantly distinguish between the impacts of "tourism" and the "tourism industry."

| Aspect of Life                    | Tourism        |                | The Tourism Industry |                |
|-----------------------------------|----------------|----------------|----------------------|----------------|
|                                   | Total Positive | Total Negative | Total Positive       | Total Negative |
| The local economy                 | 68%            | 21%            | 67%                  | 21%            |
| The overall quality of life       | 51%            | 39%            | 57%                  | 34%            |
| Natural areas and the environment | 42%            | 47%            | 43%                  | 41%            |
| Housing costs                     | 16%            | 76%            | 15%                  | 77%            |
| Traffic congestion                | 12%            | 78%            | 15%                  | 80%            |
| Housing availability              | 11%            | 76%            | 10%                  | 74%            |

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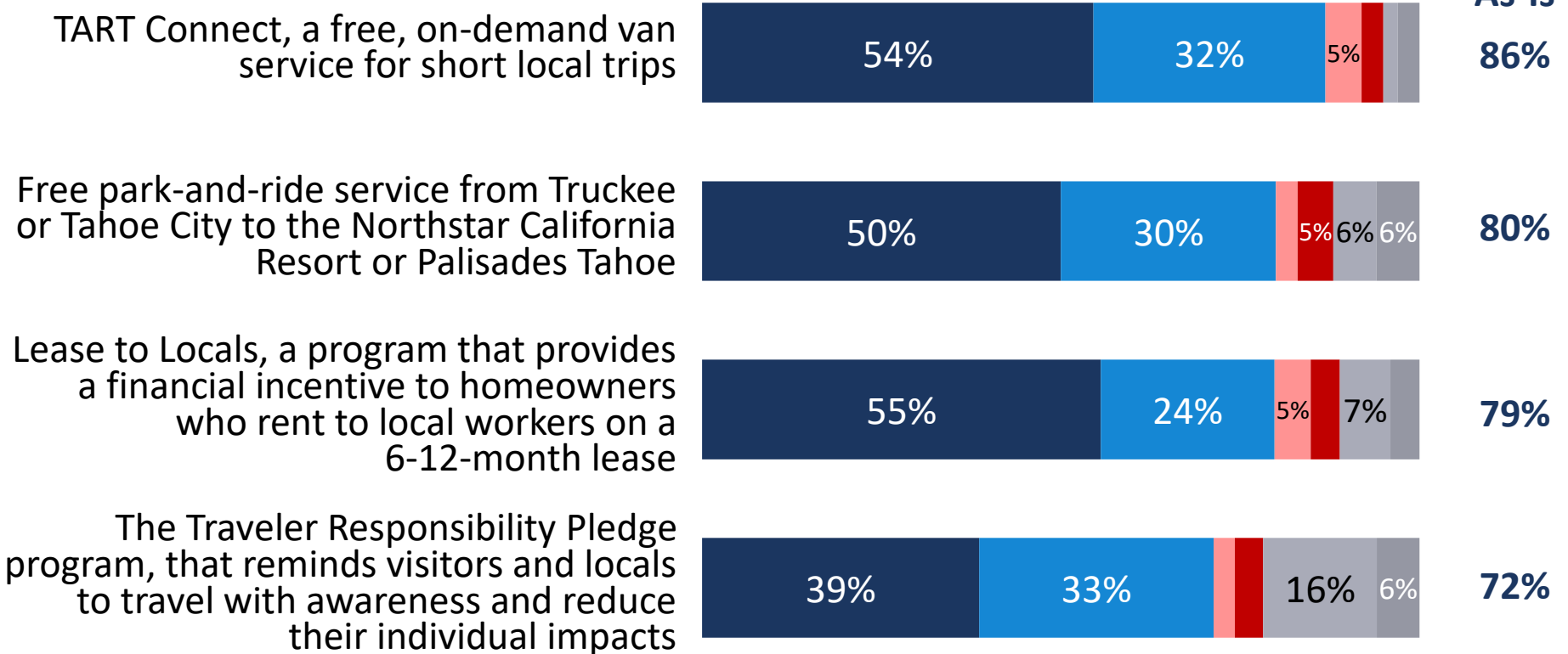
# **Views on Publicly Funded Projects**

# Roughly half of residents want to see TART Connect, park-and-ride, and Lease to Locals program expanded.

*I am going to read you a list of several more recently implemented pilot programs. Please tell me if you feel that program should be either continued and expanded, continued as-is, continued but scaled back, or not continued.*

■ Cont. and Expand. ■ Cont. As-Is ■ Cont. but Scaled Back ■ Not Cont. ■ Not Heard of ■ No Opin.

**Cont. and Expand./As-Is**

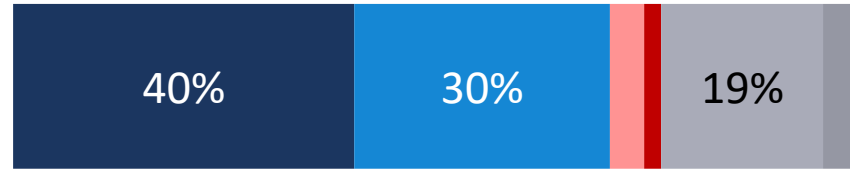


# Half would also want the Workforce Housing Preservation Program expanded.

■ Cont. and Expand. ■ Cont. As-Is ■ Cont. but Scaled Back ■ Not Cont. ■ Not Heard of ■ No Opin.

**Cont. and Expand./ As-Is**

The “Take Care Tahoe” Campaign, a program to educate about environmental stewardship in the Tahoe area



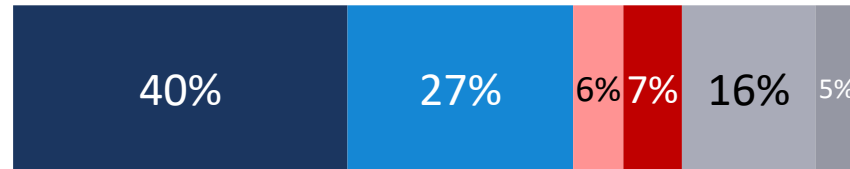
**70%**

The Workforce Housing Preservation Program, that pays a portion of a homebuyer’s expenses in exchange for a deed restriction that the property can only be occupied by local workers



**69%**

Programs that place ambassadors at popular recreations sites on the weekends during the summer to interact with tourists and encourage them to act responsibly



**67%**

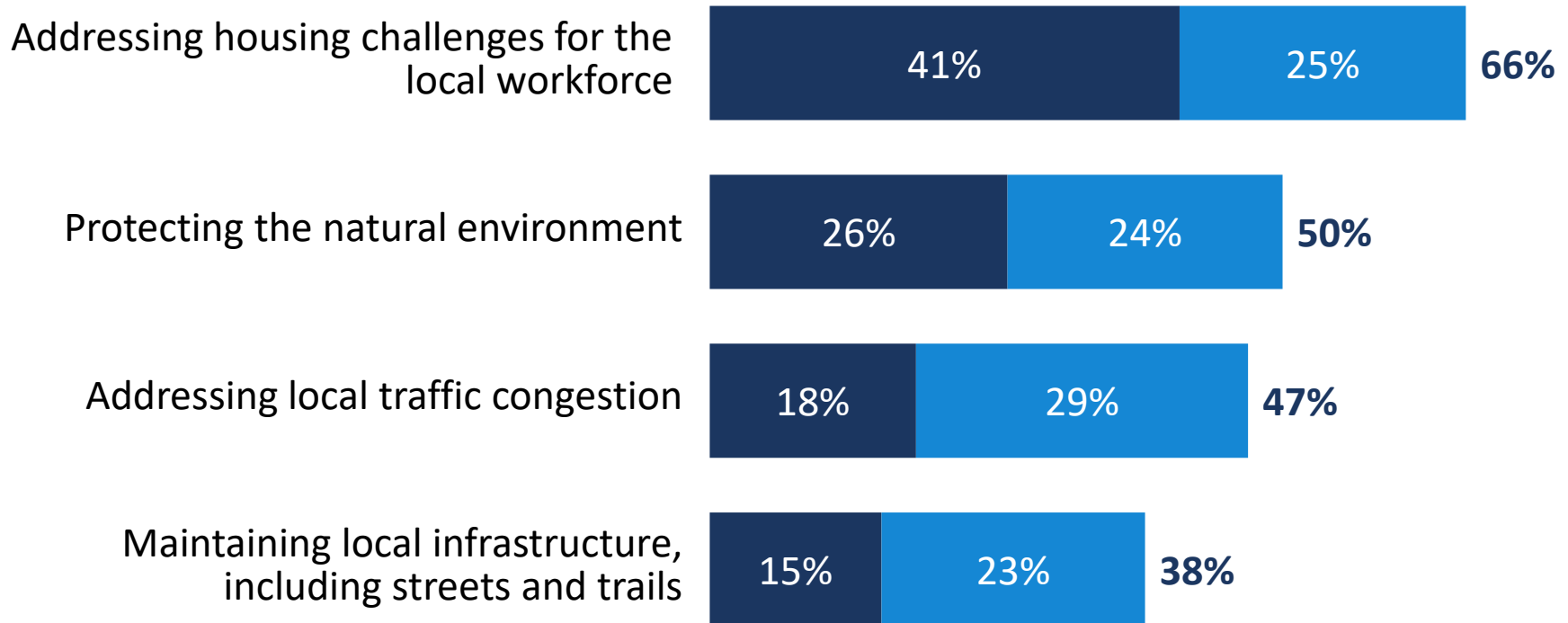
Note: Residents don’t want to see any of these pilot programs scaled back or discontinued.

Q. I am going to read you a list of several more recently implemented pilot programs. Please tell me if you feel that program should be either continued and expanded, continued as-is, continued but scaled back, or not continued.

# At the macro-level, residents feel that addressing workforce housing should be a top priority.

*I would like for you to think about future public investment that could benefit the North Lake Tahoe community. With this in mind, please consider the following different broad categories of public investment and tell me which you feel should be the highest priority and the 2<sup>nd</sup>-highest priority for future investment.*

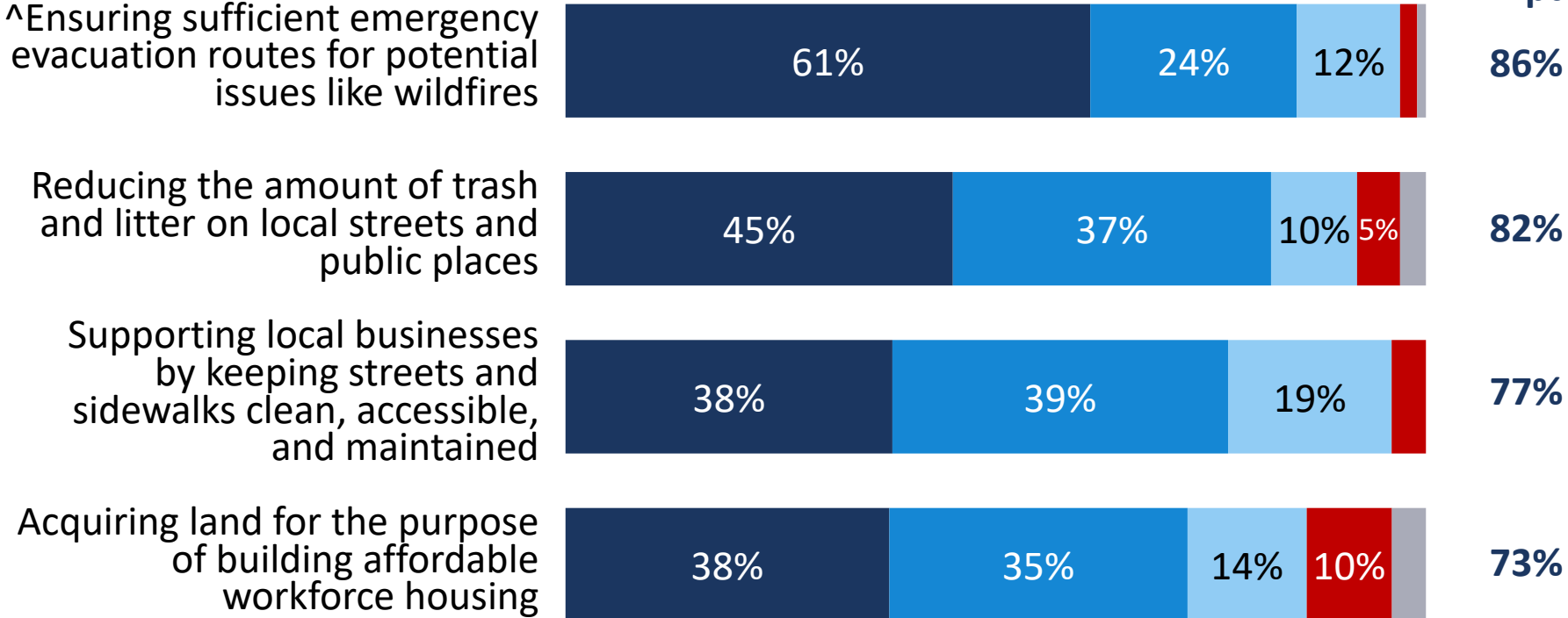
■ Highest Priority    ■ 2nd Highest Priority



# Investments to ensure emergency evacuation are a top priority, followed by keeping public places clean and workforce housing.

*I am going to read you a list of more specific public investment categories that could benefit the North Lake Tahoe community. Please tell me how important investing in each category is to you personally, either extremely important, very important, somewhat important, or not too important.*

■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know **Ext./Very Impt.**

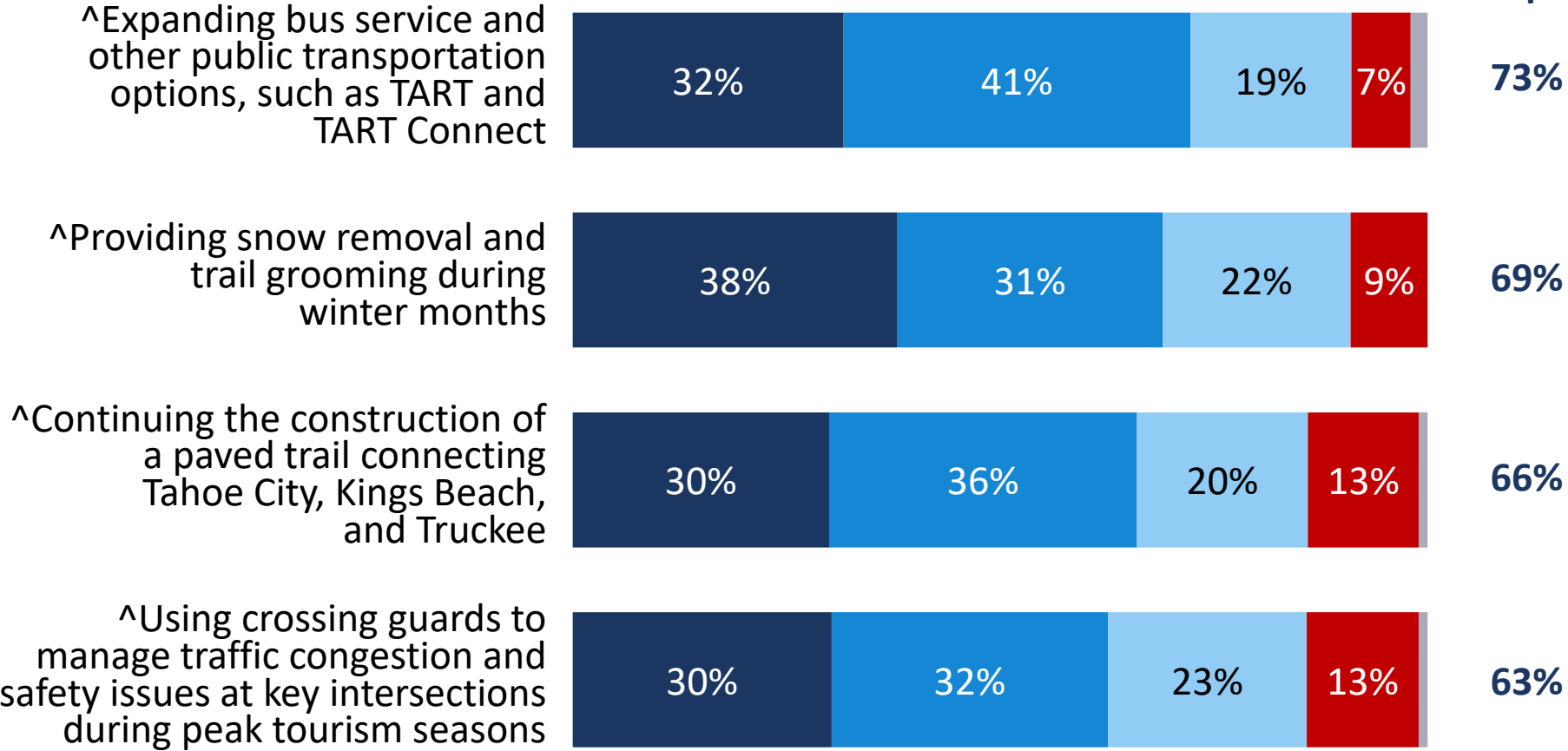




# Many also expressed some intensity around snow removal and trail grooming.

■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know

**Ext./Very Impt.**



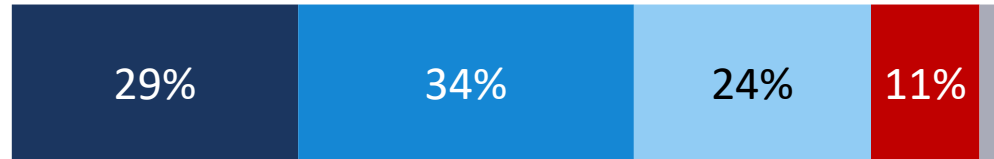
Q. I am going to read you a list of more specific public investment categories that could benefit the North Lake Tahoe community. Please tell me how important investing in each category is to you personally, either extremely important, very important, somewhat important, or not too important.

^Not Part of Split Sample

# Different parking solutions were seen as important, but with somewhat less intensity.

■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know

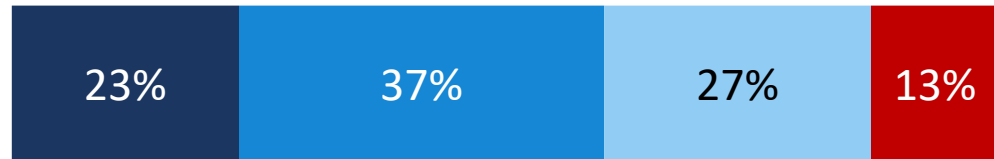
^Using stops signs and other traffic calming measures in neighborhoods where cut-through traffic is a problem



Ext./Very Impt.

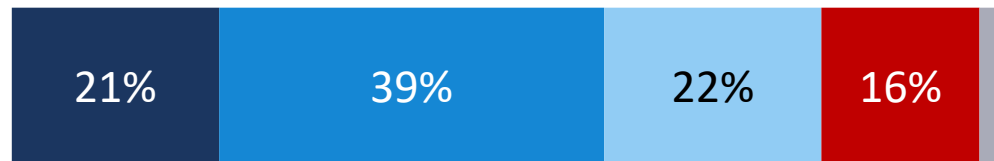
63%

Limiting the ability of visitors to park in residential neighborhoods



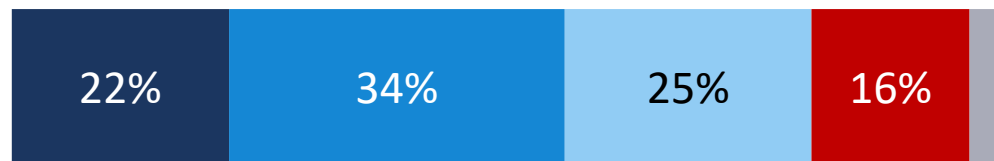
60%

Expanding visitor parking capacity in designated locations to reduce parking impacts in residential neighborhoods



60%

Creating a residential parking permit system for neighborhoods near visitor destinations



56%

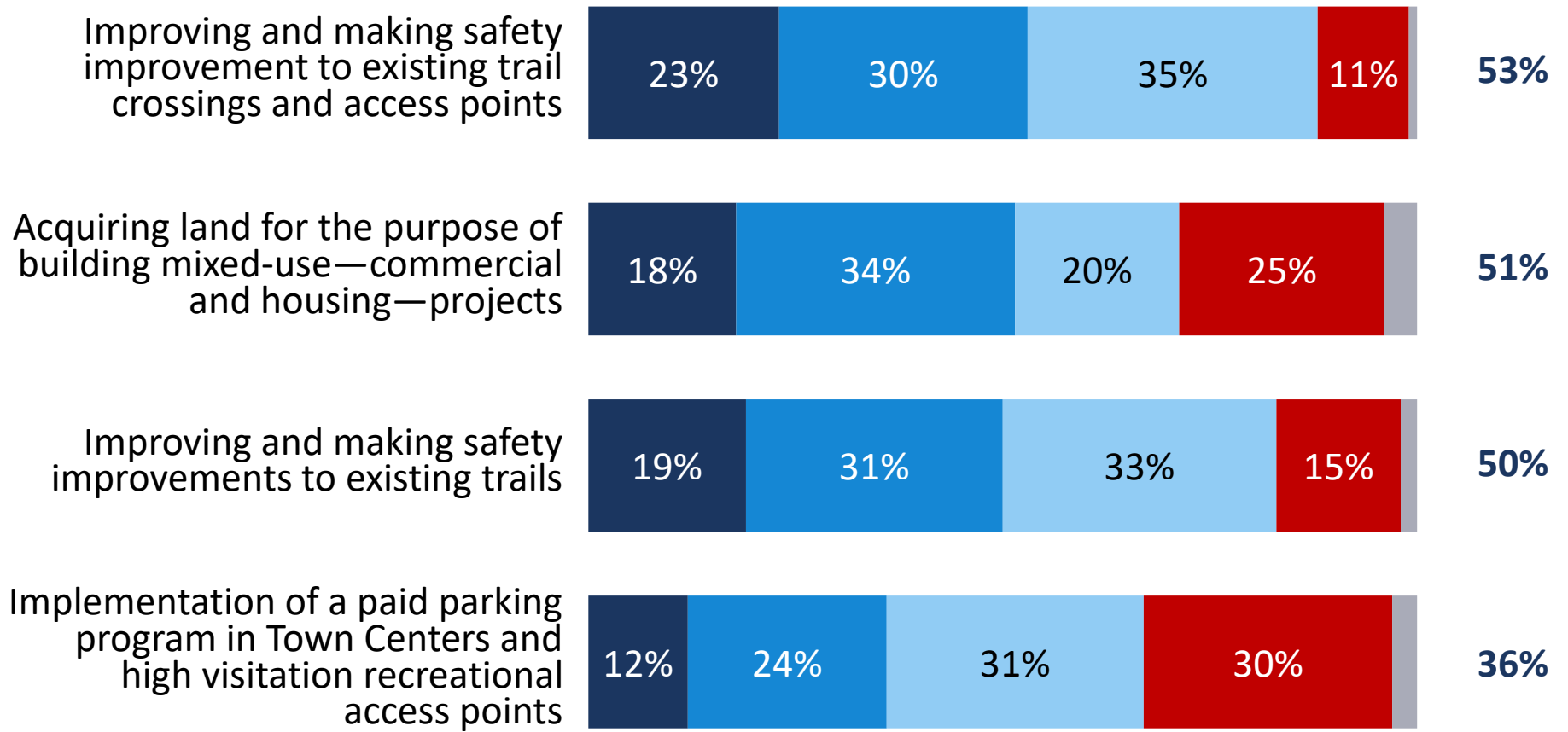
Q. I am going to read you a list of more specific public investment categories that could benefit the North Lake Tahoe community. Please tell me how important investing in each category is to you personally, either extremely important, very important, somewhat important, or not too important.

^Not Part of Split Sample

# Acquiring land for mixed-use development and a paid parking program were seen as less important.

■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know

**Ext./Very Impt.**



# By nearly a two-to-one ratio, respondents preferred that investments benefit residents year-round.

*I would like for you to consider several pairs of statements related to these topics.  
Please pick the one that comes closest to your personal opinion.*

I think we should prioritize project and programs that benefit local residents year round

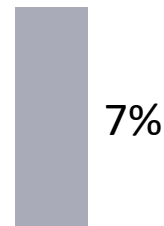


**OR**

I think we should prioritize projects and programs that address challenges of peak tourism seasons

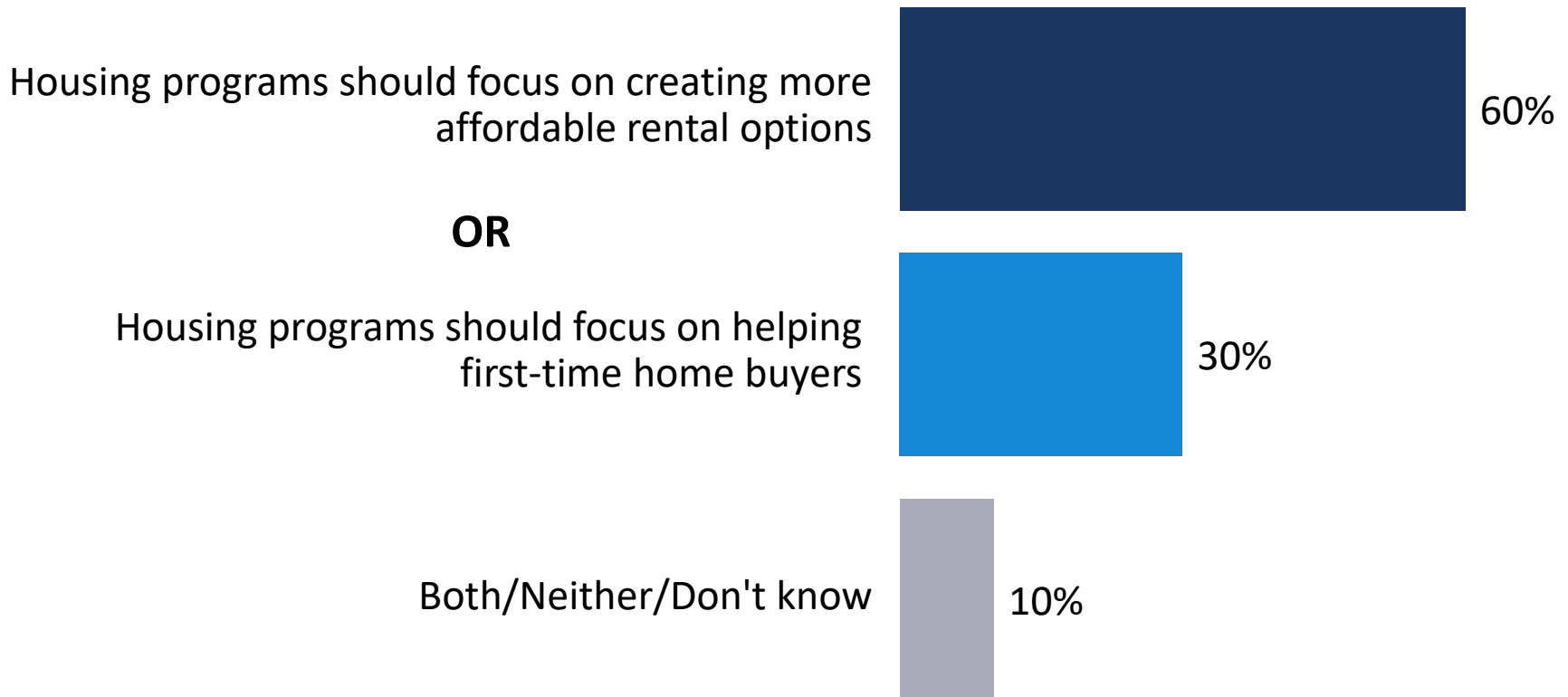


Both/Neither/Don't know



# A similar ratio prefer programs that help renters over those that help first-time home buyers.

*I would like for you to consider several pairs of statements related to these topics.  
Please pick the one that comes closest to your personal opinion.*



# Residents are evenly divided as to whether the area has reached its tourism capacity.

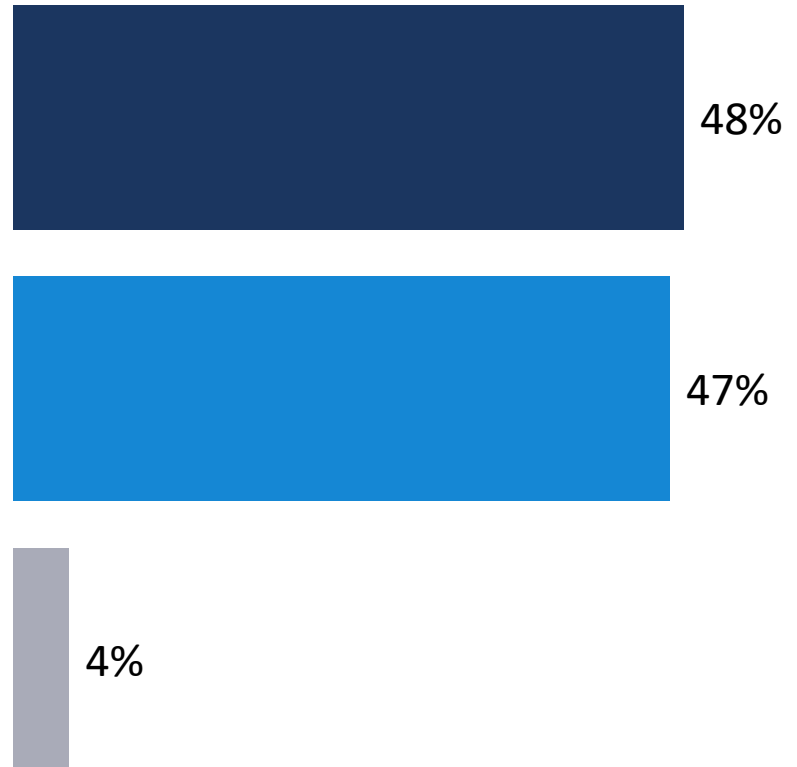
*I would like for you to consider several pairs of statements related to these topics.  
Please pick the one that comes closest to your personal opinion.*

We have already reached our capacity for handling out-of-town visitors and we shouldn't do anything that attracts more of them during peak seasons

**OR**

Tourism is the cornerstone industry of our community, so we should create programs that both educate visitors on how to reduce their impacts and help enhance the quality of life of local residents, such as Take Care Tahoe and the Traveler Responsibility Pledge

Both/Neither/Don't know





# Conclusions

# Key Takeaways

- The impact of tourism on the area are highly variable:
  - On one hand, there is broad agreement that it helps the local economy, but also has negative impacts on traffic and housing.
  - Views on the impact tourism has on the natural environment are more ambivalent.
- The existing pilot programs that spend local dollars to positively impact the local quality of life and to mitigate the impacts of tourism are all seen as good, and residents would like to see them continued (and in some cases, expanded).
- In terms of future investment areas, residents appear to prioritize housing over other broad categories (and help for renters over homebuyers), though they also definitely would like to see investments into programs that help ensure safe evacuation during emergencies



# Recommended Engagement/Outreach Messaging

- North Lake Tahoe has weathered COVID, maintaining our quality of life and local economy.
- While our tourist economy is foundational to our region's long-term fiscal sustainability, projects and programs that benefit local residents and businesses year-round should continue to be prioritized.
- In a recent independent survey, the community has prioritized the following needs:
  - ✓ Creating more affordable rental housing choices
  - ✓ Expanding emergency evacuation routes for potential issues like wildfires
  - ✓ Addressing traffic congestion
  - ✓ Maintaining or expanding pilot programs such as Lease to Locals, the Workforce Housing Preservation Program, TART Connect, and free park-and-ride services

# QUESTIONS & COMMENTS



For more information,  
contact:



**Curt Below, COO**

[Curt@FM3research.com](mailto:Curt@FM3research.com)



**Catherine Lew, President**

[Catherine@lewedwardsgroup.com](mailto:Catherine@lewedwardsgroup.com)