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MEMORANDUM

To: Cheryl Surface
Park Planner, Washoe County

From: William M. Cromer
President

Subject: Survey Analysis of the November, Non-Basin, Washoe County
Lake Tahoe Visitor Survey

Date: December 23, 2014

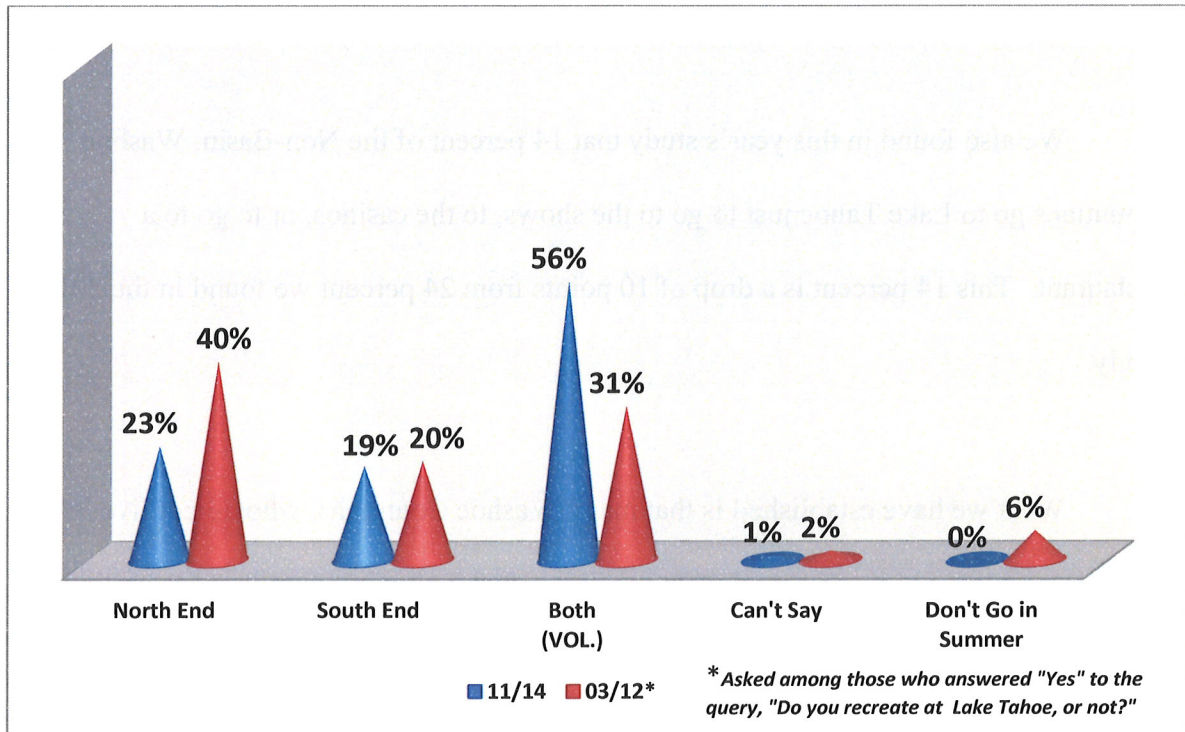
This survey of Washoe Countians who do not live in the Tahoe Basin was conducted by telephone during the evenings of November 10-12, 2014. In total, 402 interviews were completed; the sampling error is ± 5 percent at a 95 percent level of confidence, although error rate does vary according to the division of responses for each question and the resulting sample size in each cell (cross-tabulation).

To ensure a proper representation of the findings, we established quotas for each of the five commissioner districts in the County that are outside the Basin. These regional quotas were based upon the portion of voter turnout within each of the five commissioner districts and are the same ratios we used in the March, 2012 study among Non-Basin, Washoe Countians.

Back in the Spring of 2012, we found that among Non-Basin, Washoe Countians, 64 percent say they, personally, go to and recreate at Lake Tahoe. In this study, when we asked if, “you or anyone in your immediately family recreate at Lake Tahoe, or not?,” only ten percent say no. So generally speaking, it is fair to say that between two-thirds of the adult population (18+) go to Lake Tahoe and ninety percent of the families in Non-Basin, Washoe County go to the Lake to recreate. In an adult population approximating 314,000 (Non-Basin, Washoe County), that’s a lot of visitors to Tahoe. And on-average, these visitors presumably go more than just once in any given year.

Because our key point of focus was to gather attitudes toward meter parking at Lake Tahoe in this 2014 study, we terminated the ten percent who indicated they didn’t go to Lake Tahoe to recreate. In the 2012 study, only the 64 percent who said they do go to Lake Tahoe to recreate was asked which end of the Lake do they generally go to when (you) “recreate or stay overnight.” This question was repeated in this November, 2014 study. Here are the comparisons.

“THE NORTH END OR THE SOUTH END?”



This year's study did not put in the stipulation of going to Tahoe in the Summer, as the study did in 2012; thus there is no voluntary response of "Don't go in Summer," as there was in 2012.

The 56 percent who voluntarily say both is a substantial increase – an 81 percent increase to be precise.

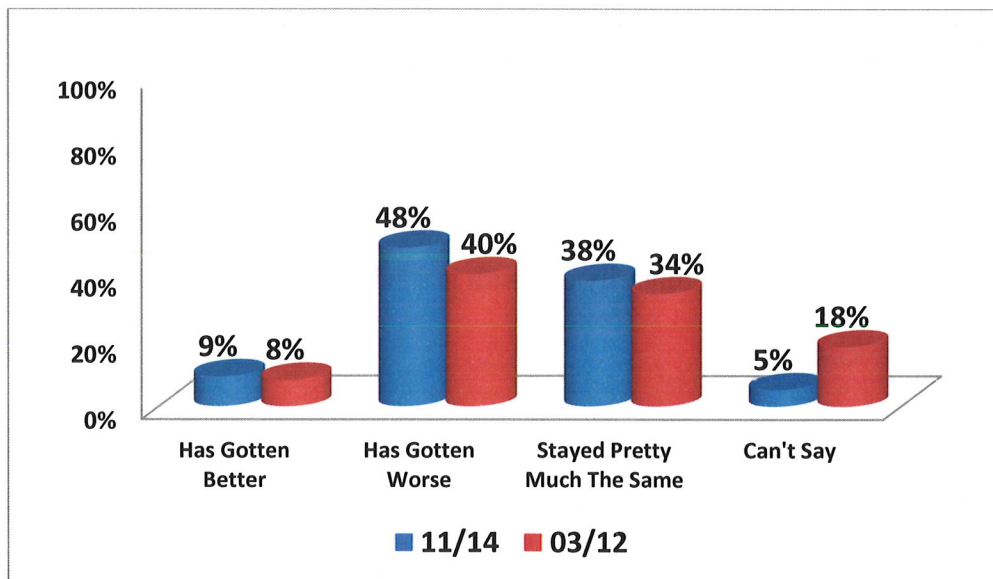
Young Men (68%) and Young Women (72%) are more prone to go to both ends. A high percentage of Men who are 55 years of age or older are prone to go to the South

End (37%) while Older Women prefer the North End (35%). But many of both, 41 percent and 52 percent respectively, also say “Both.”

We also found in this year’s study that 14 percent of the Non-Basin, Washoe Countians go to Lake Tahoe just to go to the shows, to the casinos, or to go to a restaurant. This 14 percent is a drop of 10 points from 24 percent we found in the 2012 study.

What we have established is that many Washoe Countians, who do not live in the Basin, go up there to recreate and what we find is that a growing number of them think that the transportation and traffic at Lake Tahoe has gotten worse.

“THE PUBLIC’S ATTITUDES TOWARD TRAFFIC AT LAKE TAHOE”



Population segments in which 53 percent or more say the traffic situation at Tahoe has gotten worse predominately are:

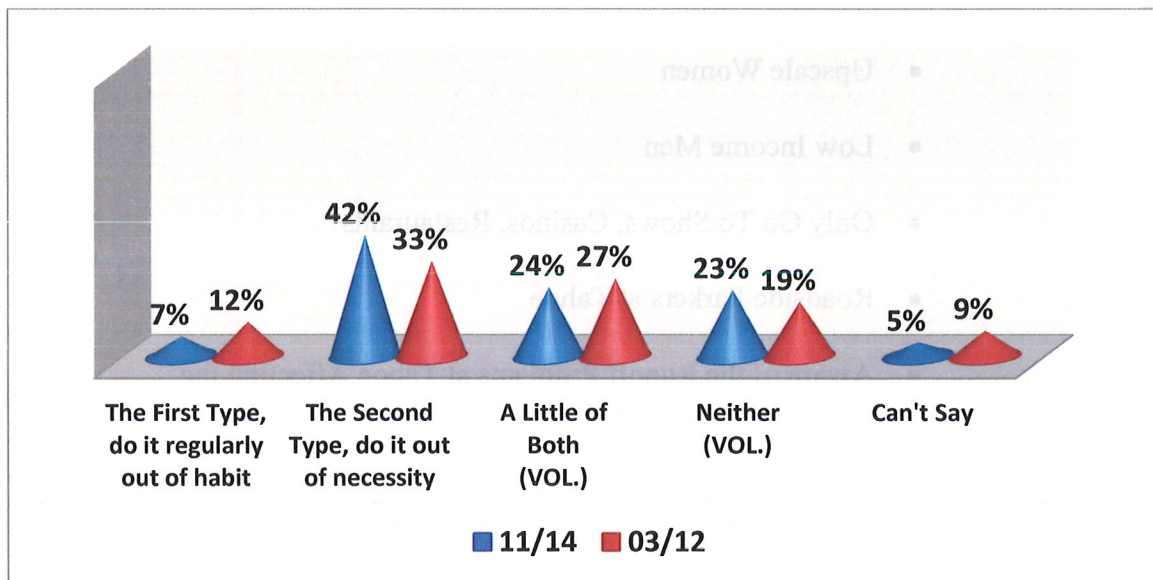
- Young Men
- Young Women
- Commissioner District #3
- Latinos
- 20+ Year Residents
- College Women
- Upscale Women
- Low Income Men
- Only Go To Shows, Casinos, Restaurants
- Roadside Parkers at Tahoe
- Aware of the Runoff Problems at Tahoe Affecting the Clarity at the Lake

We also find in this study that among the Non-Basin, Washoe Countians who go up to Lake Tahoe for other reasons than to the shows, to the casinos, or the restaurants, three-quarters (73%) have parked their vehicle alongside the roads highways in Tahoe. Today's 72 percent is essentially the same level of 73 percent we found in 2012. The difference is fewer are now doing this out of habit and more are doing it out of necessity, which no doubt contributes to why they are feeling the traffic situation has gotten worse.

ROADSIDE PARKING HABITS AT LAKE TAHOE

“Talking to others who have found themselves parking alongside the roads or highways up in Tahoe, they seem to describe themselves as one-of-two types. The first type finds themselves parking alongside the road now out of habit. It is something they’ve done so frequently over the years that it is simply second nature to them – they even kind of plan on having to do it. The other is the type that doesn’t plan on it but it happens out of necessity – they do it because it is next to impossible to find a spot in designated parking lots or areas. If you had to describe yourself as one type or the other, which one better fits your approach to roadside parking patterns up at the Lake?”

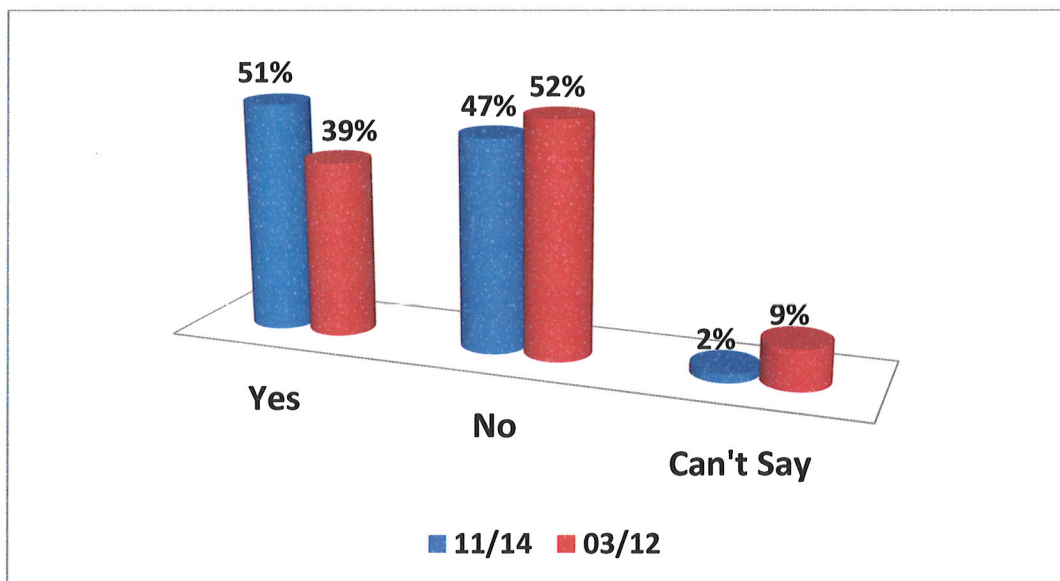
(n-346)



That’s a lot of Non-Basin, Washoe Countians clogging up the roads in the Basin, adding to the transportation stress, and compounding the transportation system run-off that diminishes the clarity of the Lake.

We also find that more and more Washoe Countians who do not live in the Basin are aware that much of the loss of clarity in the Lake is a result of the In-Basin transportation systems.

“OVER 70 PERCENT OF THE POLLUTANTS THAT ARE RUNNING-OFF INTO THE LAKE AND HINDERING LAKE CLARITY ARE DUE TO URBAN AREA RUNOFF, MUCH OF IT TRANSPORTATION SYSTEM RELATED. ARE YOU AWARE OF THIS FACT, OR NOT?”



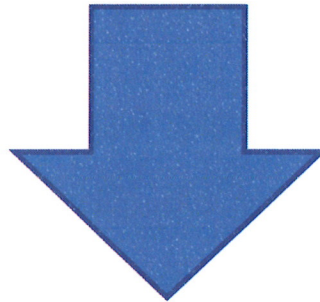
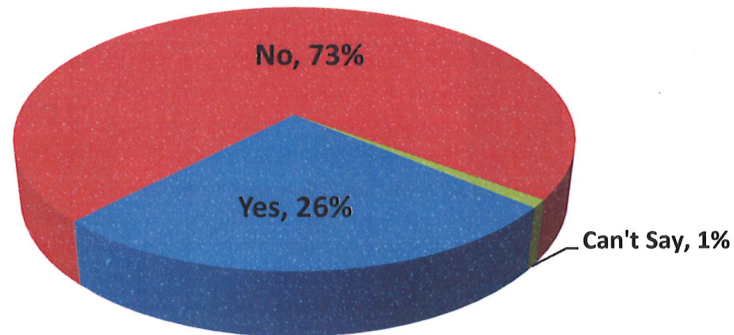
This 51 percent awareness represents a growth of 12 points or a 30 percent increase. The highest levels of awareness are among Middle-Aged Men (57%); Residents of Commissioner District #1 (60%) and Commissioner District #5 (68%); Lifelongers (65%); Latino Men (60%); Upscale Women(59%); and those who mostly go to the North End (61%) to recreate.

Looking at the background data, the timing appears to be good to introduce the idea of having parking meter kiosks at Lake Tahoe.

To begin, it is important to note that there has been minimal exposure by your constituents to parking meter kiosks in the Tahoe area. Note these findings in the graph on the next page.

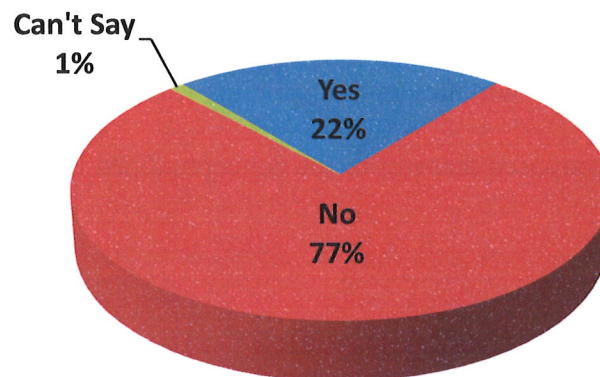
***“ARE YOU AWARE THAT IN THE RECENT PAST, PARKING
METER KIOSKS HAVE BEEN INSTALLED IN THE
TAHOE AREA, OR NOT?”***

(n = 402)

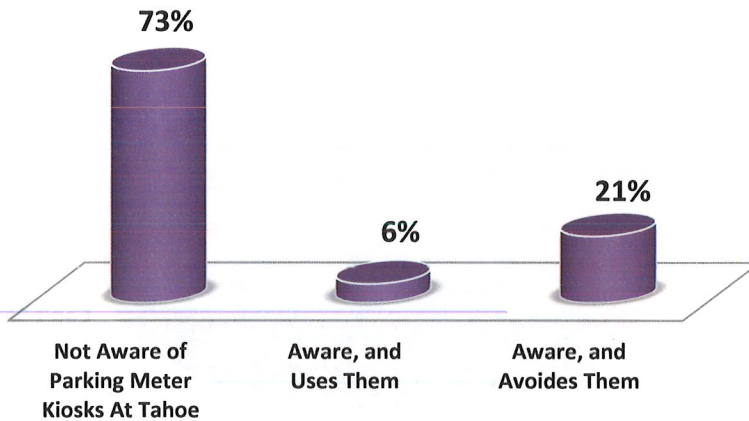


***“And, have you had a chance to park in any of these
Tahoe Area parking meter kiosks, or not?”***

(n = 106)



So, within the 18+ adult population of Non-Basin, Washoe Countians, the study indicates the following:



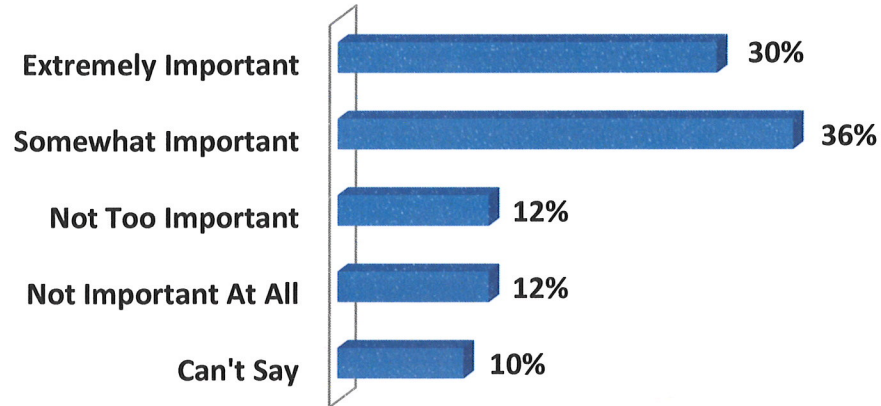
One-out-of five are Meter Avoiders. Why? Because 72 percent of the Meter Avoiders think \$2 an hour is too much; comparatively, at a much lower percentage level, 55 percent of the Meter Users feel \$2 per hour is too much.

Likewise, 65 percent of the Meter Avoiders feel \$10 per day is too much, while 43 percent of the Meter Users feel \$10 per day is too much.

But before I go farther into the depth of pricing, it is important to analyze the probes made of various proposed features of the conceptualized Lake Tahoe meter kiosks.

First is price consistency. Two-thirds (66%) say that having parking fees that are consistent all around the Lake, no matter the jurisdiction, is important.

PRICE CONSISTENCY

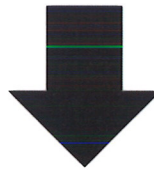
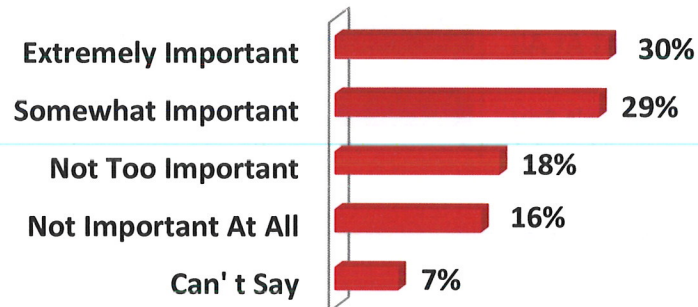


This is “extremely important” to 47 percent of the Meter Users and less “extremely important” to the Meter Avoiders (17%). Yet, even 4-out-of-7 Meter Avoiders (57%) say having price consistency is important.

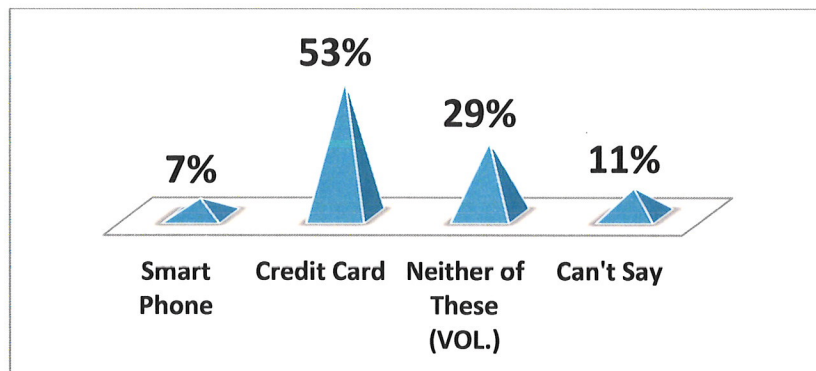
Ranking second is the ability to pay without having to use cash.

HAVING A NON-CASH PAY OPTION

“And, how important is it to you that you would be able to use either a credit card, or a smart phone to be able to pay at each meter versus having to use cash? Is this feature extremely important to you; only somewhat important to you; not too important to you; or not important at all?”



BUT WHAT IS YOUR PREFERENCE?



Three-out-of-five (59%) feel that having a non-cash option is important. Among the Meter Users, 49 percent say it is “extremely important.” And while 61 percent of the Meter Avoiders say having a Non-cash option for payment is important, just 18 percent say it is extremely important. Men (36%), much more than Women (24%), say the ability to pay by smart phone or credit card is extremely important. In Commission District #2, 42 percent also say it is extremely important.

As the reader can note from the payment method chart, by a ratio of just shy of 8:1, more prefer the credit card option over the Smart Phone. Interestingly, it is Younger Women (15%) and Older Women(12%) who say they prefer the Smart Phone to the Credit Card. Comparatively, just 6 percent of the Young Men, 7 percent of the Middle-Aged Men, 5 percent of the Older Men, and 3 percent of the Middle-Aged Women would prefer the Smart Phone.

There are, as the reader can see, about three-out-of-ten (29%) who say neither, which is a voluntarily response – quite a high percentage for a voluntary response, too.

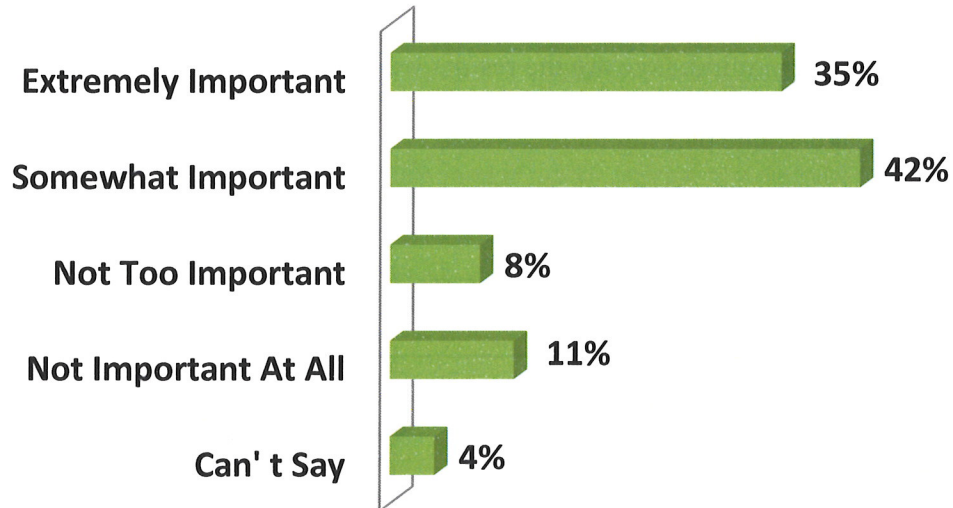
Mostly those who chose the “Neither” option are:

- Young Women (34%)
- Commissioner District #5 Residents (39%)
- 10-20 Year Washoe County Residents (37%)
- Non-College Men (35%)
- Non-College Women (34%)

- Older Latinos (37%)
- Low Income Women (33%)
- Only Shows/Casinos/Restaurants (37%)
- \$2 is Too Much (39%)
- \$10 is Too Much (37%)

The third important feature is reciprocity. We asked the question on reciprocity this way, “There is talk about making these new parking facilities reciprocal. That would mean you could pay at one parking lot for the full day, say in the morning, and go for a morning hike at one trailhead. Then, you could pull out and go to another parking lot for the beach in the afternoon. Your all-day payment would cover you all day no matter where you’d travel around the Lake – it would be reciprocal. Is having this “reciprocal” feature when it comes to parking meter paying at the Lake extremely important to you; only somewhat important; not too important; or not important at all?” Notice the results to this query on the next page.

RECIPROCAL PARKING AT LAKE TAHOE



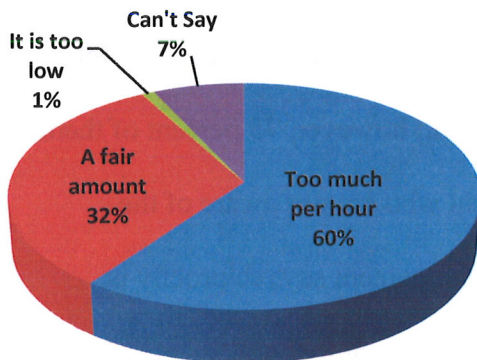
In total, over three-quarters (77%) see reciprocity as being important. Among the Meter Users, reciprocity is seen as “extremely” important by 64 percent. Among Meter Avoiders the “extremely important” response is 21 percent; however, 75 percent of them say it is an important feature. And among the 74 percent who are **not** aware of the parking meter kiosks that are in the Lake Tahoe Basin, 37 percent say reciprocity is extremely important and 46 percent say it is somewhat important to them.

Within Commissioner District #3, 41 percent feel reciprocity is extremely important and so do 49 percent in Commissioner District #4.

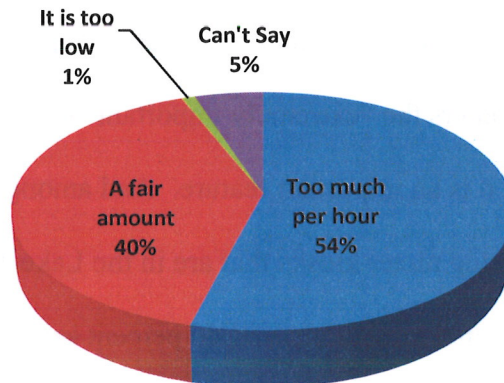
With that data in mind, here are the results we found regarding the pricing for these proposed Lake Tahoe parking meter kiosks.

ON A PER HOURLY BASIS

“At these parking kiosks in the Tahoe area, they’re charging \$2 dollars per hour, or \$10 dollars for all day parking. From your own personal perspective, how do you feel about the \$2 dollar per hour rate? Do you feel it is too much per hour; a fair amount; or do you feel it is too low?”



“Needless to say, everyone would like to park for free. If you factor in the cost of building the parking lots, the maintenance, the upkeep, the environmental needs to address the run-off as it relates to the clarity of Lake Tahoe, and the need to get more vehicles off the roads for safety reasons, how do you now feel about the \$2 dollar per hour parking rate? Do you now feel it is too much per hour; a fair amount; or it is too low?”

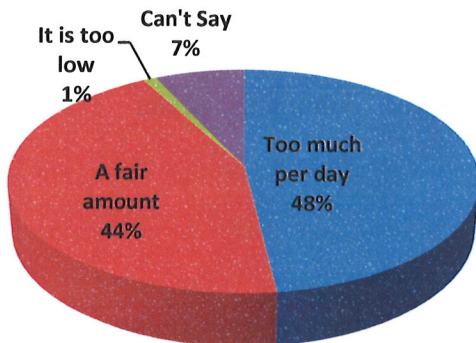


Messaging on the clarity of the Lake improves the tolerance for paying \$2 per hour. But still, a majority of 54 percent still feel this rate is too high.

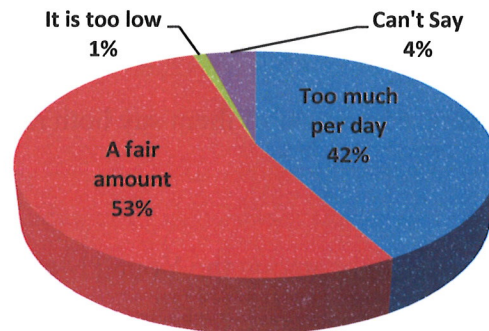
The \$10 per day basis is seen as somewhat more acceptable, but to get a majority to feel it is fair, you will need the messaging that the cost is part of an overall effort to improve the clarity of Lake Tahoe.

ON A DAILY BASIS

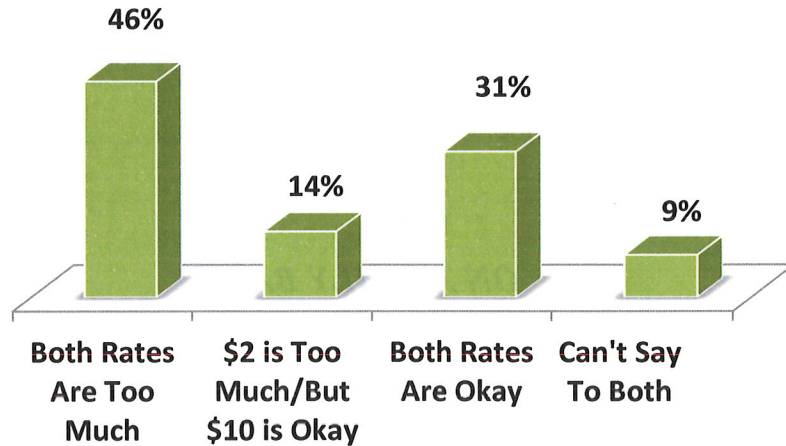
“How about the \$10 dollar per day rate? From your personal perspective, how do you feel about the \$10 dollar per day rate at these parking meter kiosks? Do you feel this daily rate is too much; a fair amount; or it is too low?”



“And considering all these environmental, safety, and financial costs for the parking lots, how do you now feel about the \$10 dollar per day cost? Do you now feel it is too much to pay per day; a fair amount; or it is too low?”



Pre the environmental message to properly build the parking metered kiosks with an eye to improving the clarity of the Lake, here is how the Non-Basin, Washoe County adult population initially view the \$2 hourly rate and the \$10 daily rate for parking.



Among Young Women, 58 percent say both rates are too much. So do 55 percent and 54 percent respectively in Commissioner District #4 and Commissioner District #5. And a majority of 52 percent of Washoe County Latinos agree. Among the Meter Avoiders, 65 percent of them say both rates are too high.

It is only among the Young Men in which a majority (54%) feel both rates are fair.

What is a fair hourly rate? We asked them in an open-end question. Eighteen percent could not give us a response and 15 percent feel the parking should be completely free – no charges at all. Among the two-thirds that did give a response, the average hourly rate they landed upon is:

\$1.49

In the aggregate, 41 percent cited less than \$2 and 26 percent chose \$2 or more, but most of that was between \$2 and \$2.50.

And as to the preferred daily rate, the average rate suggested is:

\$8.00

This \$8 even rate came from two-thirds of the Non-Basin, Washoe Countians.

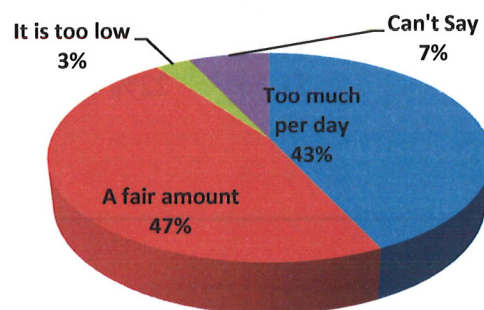
Critically, 13 percent say the parking should be free. And, 19 percent could not give us a response to the question.

***PARKING METER COST ATTITUDES BY
HOUSEHOLD INCOME AND COMMISSIONER DISTRICT***

	<i>Hourly Basis Average</i>	<i>Free</i>	<i>Daily Basis Average</i>	<i>Free</i>
Less than \$50,000 Per Year Households	\$1.74	20%	\$8.00	16%
\$50,000 Per Year or Greater Households	\$1.44	14%	\$8.40	11%
Upscale Men	\$1.56	13%	\$8.70	10%
Upscale Women	\$1.27	14%	\$8.00	12%
Low Income Men	\$1.65	10%	\$8.50	10%
Low Income Women	\$1.79	24%	\$7.50	19%
Commissioner District #1	\$1.39	15%	\$8.10	10%
Commissioner District #2	\$1.96	12%	\$8.20	10%
Commissioner District #3	\$1.52	18%	\$9.50	19%
Commissioner District #4	\$1.19	12%	\$7.50	9%
Commissioner District #5	\$1.34	22%	\$7.20	20%

Given the results we've seen in this study, we strongly feel you should consider going with an hourly rate closer to \$1.50 and a daily rate of closer to \$8.00 to gain broader level of acceptance, particularly in the first year. It is far better to get a healthy majority of adult residents buy in to this new method of parking at Tahoe than to have a minor civic uproar over what will be a jarring note to begin with. Keep in mind, just about one-of-every-eight Non-Basin, Washoe County residents feel they should be able to park for free when they go to Tahoe to recreate, and one-in-five are already avoiding the currently installed meters. It is also clear that there are some residents who likely can't afford the \$2 per hour rate and the \$10 daily rate to park at Lake Tahoe. To them, these rates are prohibitive to their ability to recreate at Lake Tahoe. To underscore that point, we have found that a sizable number of 43 percent say the \$12 per day rate to park at Sand Harbor for non-resident parking is too much.

“And this summer and last, the Nevada State Park at Sand Harbor in the North Lake Tahoe area was charging \$10 dollars per all day for resident parking and \$12 dollars per all day for non-residents. Do you feel the \$12 per all-day non-resident parking fee at Sand Harbor was too much; a fair amount; or it is too low?”



Within Commissioner District #5, 53 percent feel the Sand Harbor rate of \$12 per day for non-residents is too much. So do Non-Basin, Washoe Countians who have lived in the County all their lives.

Since the adult population base is approximately 314,000 for this study, one percent of the population equals about 3,140 adult, 18+ residents in Washoe County who do not live in the Tahoe Basin.

We have found that 27 percent, or roughly 84,780 adult residents in Non-Basin, Washoe County, find the concept of parking meter reciprocity “very appealing” as an **incentive** to go and recreate at Lake Tahoe. Chiefly, they are Young Men (33%); Middle-Aged Men (35%); Commissioner District #4 Residents (43%); 10-20 Year Residents (39%); 10 years or Less Residents (34%); College Women (33%); Low Income Men (40%); and South Enders (37%).

Reciprocity, Parking Consistency, Availability of a Non-Cash Pay Option, and Messaging on the Parking Meter Kiosks – specifically that Development and Maintenance are of critical importance to keeping Lake Tahoe Clean – are just as essential to obtaining larger public policy buy-in as is getting the price right.

