Lauren Schlau Consulting

PROFILE OF LAKE COUNTY, CA VISITORS
for

CALIFORNIA'S
LAKE COUNTY

December 2018

December 2018

Lake County Administrative Office
255 N. Forbes Street
Lakeport, CA 95453
Attn: Michelle Scully

Dear Ms. Scully:

LSC is pleased to present the following report profiling Lake County visitors over the past three years.

Please let me know if you have any questions or would like further review of the findings.

Thank you very much for choosing LSC to provide these services to you and your associates, and I look forward to any future opportunities to assist.

Sincerely,

President

Overview

- **Study Background**
- **Summary of Key Findings**
- **Observations and Suggestions**

BACKGROUND – LAKE COUNTY CALIFORNIA

- Lake County is a bucolic region about a two hour drive north of San Francisco and Sacramento.

- While among the state's least populated counties with about 65,000 residents, Lake County's wide variety of natural and man-made features and activities make it attract to non-local visitors, making tourism an important component of the County's economy. Among its key assets are;
  - Clear Lake, the state's largest natural fresh water lake, offering many related water activities
  - Rural scenic beauty, fresh air and a range of outdoor land-based activities
  - A burgeoning winery industry of interest to visitors seeking new wines and experiences

- Lake County has experienced challenges to its natural environment including several large wildfires and varied lake quality conditions, and to its infrastructure, notably the closing of a large resort hotel.
  - Hotel tax revenue, visitor spending and tourism employment are stagnant, as shown on the next slide.

- As a result, Lake County visitors may perceive the area both positively and negatively; generally liking its natural beauty, while concerned about the challenges, often exacerbated by media.

- Given tourism's contribution to Lake County's economy and quality of life, area stakeholders seek to better understand who visitors are, what motivates them to visit, and other key information to support marketing for building and sustaining the area's tourism industry.

TOURISM SPENDING & T O TAX SLOW GROWTH; EMPLOYMENT EBBING

Exhibit 1 – Historic Lake County Visitor Impacts

Year	Direct Visitor Destination Spending (mill.)	Visitor Supported Jobs	Transient Occupancy Tax (FY)*
2017	$155.0	1,570	$1,048,600
2016	$ 157.9	1,630	$ 1,242,000
2015	$ 157.4	1,600	$ 893,000
2014	$ 154.5	1,630	$ 955,000
2011	$ 150.7	1,800	$ 819,000

* Includes incorporated cities of Lakeport and Clearlake, and County unincorporated areas

Source: California Travel Impacts by County,1992-2018 for Visit California by Dean Runyan Associates and Lake County Office of Economic Development

SUMMARY OF KEY FINDINGS -1

Research was conducted among Lake County visitors (method detailed in the Appendix), with the key findings as follows.

Residence
- 99% of total Lake County visitor * respondents are U.S. residents, and 77% are from California (with fewer than 3% from any other state).

Past & Current Visitation
- 54% of respondents actually had visited Lake County in the past two years; and they made nearly 6 visits to the area in that time.
  - Of those who had visited but prior to two years ago, 26% hadn't come since then citing a lack of time and 19% hadn't taken any trips since 2015. Few cited any specific complaints about the area.
  - Of these non-recent visitors 61% would come if offered a special promotion, and 38% would come for a special event

- Fall is the preferred season among these visitors with Summer next.

Purpose & Planning Sources
- Visitors came to Lake County mainly for vacation/pleasure trip, by 25% and 19% were visiting friends/relatives.
  - Other additional reasons included wine tasting sightseeing and outdoor (land) recreation.

- For trip planning 43% used past experience/visit, 25% family/friend referral and 24% used (any) web sources.
  - Lake County.com was the main *Internet* source used by an impressive 65%; 47% used Google search.

Main Destination, Mode of Arrival

- Lake County was the main destination for 86% of visitors.

- 97% arrived in Lake County by driving; 85% drove a personal vehicle and 11% used a rental (suggesting they flew in somewhere else and rented the vehicle).

Lake County Activities Areas & Venues Visited

- Of Lake County activities, 62% ate in area restaurants; 37% each did: outdoor land activities (e.g., hiking, biking, etc.), visited wineries, and/or sightseeing/exploring in the area.

- Of Lake County areas, 66% visited Lakeport, 46% each visited Clearlake and Kelseyville, and one-third each visited Upper Lake, Nice and Lower Lake.
  - 48% of Hotel guests visited Upper Lake and 72% of winery visitors went to Lakeport.

- As to specific area attractions/venues, 55% went to Clear Lake 26% went to Clear Lake State Park and 20% to Blue Lakes.

Satisfaction & Importance Ratings

- Visitors were highly satisfied with Lake County as a destination, with 89% extremely or very satisfied, with an overall mean rating of 4.2 (out of 5)

- They were satisfied mainly with:
  - Their activities – 62%
  - A relaxing/unhurried area - 60%
  - The friendliness of locals - 56%
  - Lack of congestion/crowds – 51%

- Ratings for the *importance* of factors when considering or visiting Lake County, the top items (well above others) were (percentage; mean):
  - Uncrowded/laid back - 80%; 4.02
  - Affordability -75%; 3.90
  - Being by the lake – 72%; 3.97

SUMMARY OF KEY FINDINGS - 4

Visitation Length

- Of *all* Lake County visitors, 88% stayed overnight thus only 12% were day visitors.

- All visitors averaged 2.9 nights in Lake County.

Lodging

- *Overnight* only Lake County visitors' stays averaged 3.2 nights
  - 46% stayed in a Lake County hotel/motel
  - 25% lodged with family/friends
  - 9% camped
  - 8% used an on-line vacation rental (e.g., Airbnb)

Visitor Group and Per-Capita Spending

- 98% of Lake County visitor groups spent here that day on their trip; 88% spent on meals out/snacks, 66% spent on groceries/personal items, 61% bought drinks/ beverages, 54% spent on local transportation and 50% spent on paid lodging.

- Each Lake County visitor *group* spent an overall average of $277 *daily,* while on a *per-capita* basis each visitor spent an average of $128 *daily* in Lake County.

Travel Group Type & Respondent Demographics

- 48% of Lake County visitor groups were couples, while 21% were traveling in a family group. Each visitor group averaged 2.0 persons.

- The median respondent age was 61

- 72% of Lake County visitors have no children in their household

- 79% of U.S. resident visitors identify as Caucasian (non-Hispanic/Latino)

- Median annual household income is $92,700

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Exhibit 2 – Spending Amount (per group/day)

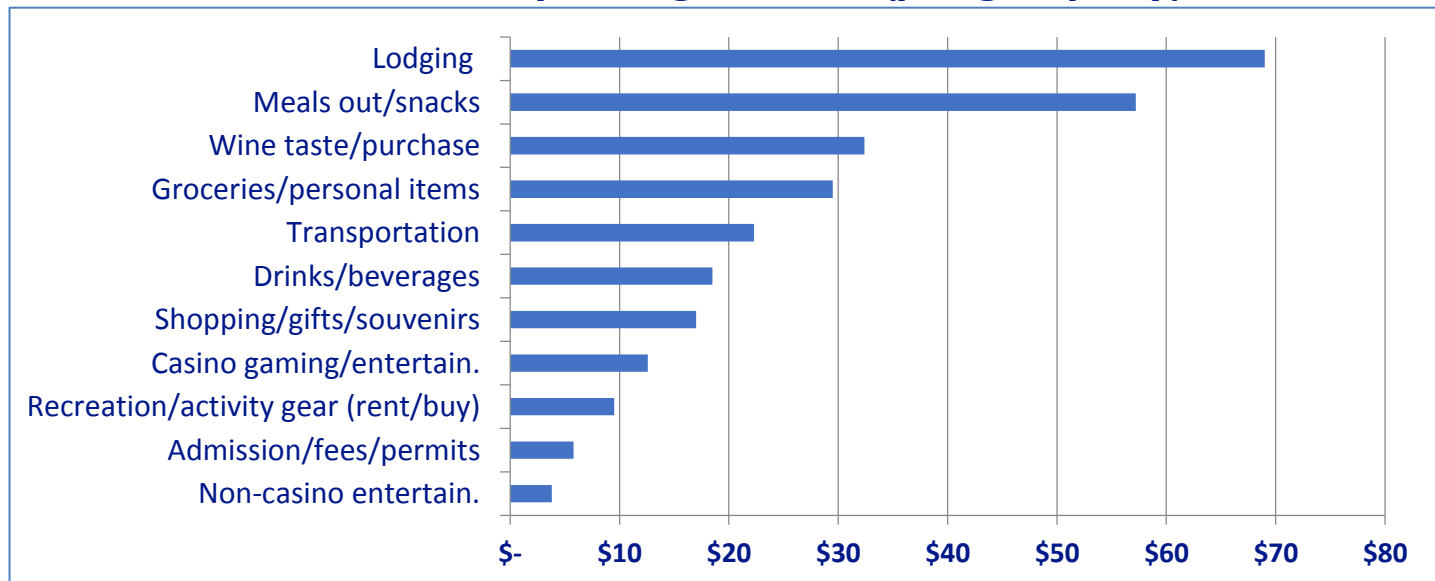**Travel Group Type & Respondent Demographics**

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Observations & Suggestions

OBSERVATIONS & SUGGESTIONS

The study goals were to produce data to help build Lake County's visitor base by identifying Lake County regular and infrequent visitors and their visit motivations. Observations and recommendations based on the research are below to apply to marketing to build tourism.

1. **Observation**: Many actual visitors come frequently; at the same time they are likely the same people.
   - ✓ **Suggestion**: to increase the share of new visitors in areas where Lake County is already known; then expand the geographic visitor base beyond Northern California.

2. **Observation**: those who have never come cited *distance* as a factor, but also didn't recall promotion, being told or knowing much about the area. This indicates *low awareness* rather than negative perceptions.
   - ✓ **Suggestion**: To raise awareness and motivate visitation the area needs to be more frequently promoted to the target audiences.

3. **Observation**: To that point, in response to what might get them to visit or revisit Lake County, 6 in 10 would respond to a *special offer/discount*, and 4 in 10 would attend a *special event*.

   ✓ **Suggestion**: On website feature 1 – 2 special events/festivals/occasions each month special events/festivals/ holidays and market each one 2 – 3 months in advance through e-mail and social media channels. Combine with incentives/packages to motivate more visitors to come more often, thereby expanding the visitor base and economic impact.

4. **Observation**: As well, attending a special event and doing outdoor (land) recreation are major reasons for coming, and secondarily wine tasting. In addition, most visitors ate in local restaurants.

   ✓ **Suggestion**: As land activities, wine tasting are complementary activities, stronger well-timed promotion, with packaged offers should appeal to a broader base.

OBSERVATIONS & SUGGESTIONS

5. **Observation**: Many visitors went to multiple Lake County locales per visit, likely related to their purpose(s).

✓ **Suggestion**: it may be effective to market Lake County as a whole; then within the overall framework, highlight each area's unique attributes and activities, including restaurants.

6. **Observation**: To track where the destination and the TID is starting it is important to collect and related data on a regular basis.

✓ **Suggestion**: Subscribe to Smith Travel Reports (STR) for hotel/motel performance data and to AIRDNA for vacation rental segment data.

7. **Observation**; Visitors reported a high median age with more couples than families visiting Lake County.

✓ **Suggestion:** Highlight activities for families, include good value and consider specific outreach to Hispanic families.

Detailed Findings

OVER HALF OF RESPONDENTS HAD VISITED LAKE COUNTY

- Half or 50% of the survey respondents were non-residents who had visited Lake County in 2016 or 2017, and 4% were visiting in 2018.

- Another 29% were non-residents who had visited before 2016.

- Nearly 17% of respondents answering the survey had never visited the area.

Table 1 – Visitation Timing

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base:	**301**	**65**	**36**	**53**	**61**	**41**	**61**	**132**	**164**
Non-resident of Lake County and visited Lake County in 2016 or 2017	49.8%	98.5%	83.3%	90.6%	96.7%	82.9%	83.6%	47.0%	51.8%
Non-resident of Lake County and visited Lake County before 2016	29.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	34.8%	25.6%
Non-resident of Lake County and considered but never visited Lake County	16.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.8%	22.0%
Non-resident of Lake County, visiting in 2018	4.3%	1.5%	16.7%	9.4%	3.3%	17.1%	16.4%	8.3%	0.6%
Other or none of the above	0.3%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.8%	0.0%

MOST FROM THE U.S.

- Virtually all the respondents, 99% are United States residents.

Table 2 – Residence Country

| | Total | Overnight Lodging | | | Activities | | | Age | |
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base:	**301**	**65**	**36**	**53**	**61**	**41**	**61**	**132**	**164**
United States	98.7%	100.0%	97.2%	96.2%	100.0%	97.6%	95.1%	98.5%	98.8%
S. Korea	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
United Kingdom (Ireland/Scotland/ Wales/England)	0.3%	0.0%	0.0%	1.9%	0.0%	2.4%	1.6%	0.8%	0.0%
Canada - Western	0.3%	0.0%	0.0%	1.9%	0.0%	0.0%	1.6%	0.0%	0.6%
Canada - Eastern	0.3%	0.0%	2.8%	0.0%	0.0%	0.0%	1.6%	0.0%	0.6%

U.S RESIDENTS MAINLY CALIFORNIANS

Table 3 – Residence State

- Among the U.S. resident respondents, 77% are from California with 7% from Illinois.

- Fewer than 3% are from any other states.

- Hotel guests were more concentrated with 88% of them from California, as were 87% of those doing outdoor land activities.

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: U.S. Resident	297	65	35	51	61	40	58	130	162
California	77.1%	87.7%	68.6%	84.3%	86.9%	80.0%	69.0%	84.6%	71.0%
Illinois	7.4%	0.0%	2.9%	0.0%	0.0%	2.5%	0.0%	0.8%	12.3%
Washington	2.4%	1.5%	5.7%	0.0%	1.6%	2.5%	3.4%	2.3%	2.5%
Nevada	2.0%	4.6%	2.9%	2.0%	3.3%	5.0%	3.4%	1.5%	2.5%
Oregon	1.7%	0.0%	0.0%	5.9%	1.6%	2.5%	5.2%	0.8%	2.5%
Hawaii	1.0%	1.5%	2.9%	0.0%	1.6%	2.5%	1.7%	0.8%	1.2%
Michigan	1.0%	0.0%	2.9%	0.0%	1.6%	0.0%	3.4%	0.8%	1.2%
Arizona	0.7%	0.0%	0.0%	3.9%	0.0%	0.0%	1.7%	0.8%	0.6%
Colorado	0.7%	0.0%	2.9%	2.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Florida	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.6%
Louisiana	0.7%	1.5%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	1.2%
Utah	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.6%
Idaho	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Kansas	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Minnesota	0.3%	1.5%	0.0%	0.0%	0.0%	0.0%	1.7%	0.8%	0.0%
New Jersey	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
New Mexico	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
New York	0.3%	1.5%	2.9%	0.0%	1.6%	0.0%	1.7%	0.8%	0.0%
North Carolina	0.3%	0.0%	2.9%	0.0%	0.0%	0.0%	1.7%	0.8%	0.0%
Ohio	0.3%	0.0%	2.9%	0.0%	0.0%	2.5%	1.7%	0.8%	0.0%
Oklahoma	0.3%	0.0%	2.9%	0.0%	1.6%	0.0%	1.7%	0.8%	0.0%
Tennessee	0.3%	0.0%	0.0%	2.0%	0.0%	0.0%	1.7%	0.8%	0.0%
Texas	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Wisconsin	0.3%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.6%

LACK OF AWARENESS MAY INHIBIT VISITATION

- Among the 17% who had never visited, 44% said it was too far from home.

- Another 36% don't recall any promotion about Lake County, 30% said no one mentioned it to them and 24% don't know enough about it, all of these responses seem to be about a lack of awareness of what Lake County offers (although they may have heard of it).
  - And while in different order, the lack of knowledge is the main reason for both age groups, those under or those over 60.

Table 4 – Why Never Visited Lake County

	Total	Age	
		<60	60+
Base: Never visited	**50**	**13**	**36**
Too far from home	44.0%	23.1%	50.0%
Never saw any ads or promotions about it	36.0%	38.5%	33.3%
No one ever told me about it	30.0%	0.0%	38.9%
Don't know enough about it	24.0%	15.4%	27.8%
I heard a little bit but not enough to motivate me to go	16.0%	30.8%	11.1%
Prefer to travel in other places	4.0%	0.0%	5.6%
Heard or read bad/negative things about it	2.0%	7.7%	0.0%
Other reason	14.0%	23.1%	11.1%

VISITORS COME TO LAKE COUNTY ABOUT TWICE A YEAR

All respondents were asked how many times they had visited Lake County in the past two years. This is discussed below and shown on the table on the next slide.

- Nearly half or 46% of all respondents had not visited Lake County in the past two years, thus 54% had visited in the past two years.

- The total respondents averaged 2.4 visits to Lake County in the past two years (those who did and did not visit).

- Respondents who had visited, averaged 5.7 visits to Lake County in the past two years. Nearly half, 49% visited 2 – 5 times and 17% had visited 6 – 10 times.

Table 5 - Visits to Lake County in Past Two Years
(all respondents and those who had visited)

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: all visitors	**301**	**65**	**36**	**53**	**61**	**41**	**61**	**132**	**164**
0/Never	45.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	44.7%	47.6%
1 time	10.0%	21.5%	2.8%	17.0%	16.4%	7.3%	16.4%	13.6%	7.3%
2-5 times	26.2%	50.8%	52.8%	56.6%	57.4%	56.1%	59.0%	22.0%	28.7%
6-10 times	9.3%	16.9%	19.4%	15.1%	19.7%	19.5%	11.5%	11.4%	7.3%
11-20 times	4.7%	7.7%	13.9%	7.5%	4.9%	9.8%	9.8%	5.3%	4.3%
21-50 times	2.7%	1.5%	8.3%	1.9%	1.6%	7.3%	3.3%	2.3%	3.0%
Mean visits (all respondents)	**2.4**	**4.0**	**8.9**	**4.2**	**3.7**	**6.4**	**4.3**	**2.4**	**2.4**
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
1 time	18.4%	21.5%	2.8%	17.0%	16.4%	7.3%	16.4%	24.7%	14.0%
2-5 times	48.5%	50.8%	52.8%	56.6%	57.4%	56.1%	59.0%	39.7%	54.7%
6-10 times	17.2%	16.9%	19.4%	15.1%	19.7%	19.5%	11.5%	20.5%	14.0%
11-20 times	8.6%	7.7%	13.9%	7.5%	4.9%	9.8%	9.8%	9.6%	8.1%
21-50 times	4.9%	1.5%	8.3%	1.9%	1.6%	7.3%	3.3%	4.1%	5.8%
51+ times	2.5%	1.5%	2.8%	1.9%	0.0%	0.0%	0.0%	1.4%	3.5%
Mean visits (visited)	**5.7**	**4.0**	**8.9**	**4.2**	**3.7**	**6.4**	**4.3**	**5.7**	**5.8**

FEW INFREQUENT PAST VISITORS CITED NEGATIVE REASONS

- Among those who had visited - but prior to two years ago - 26% said they didn't have enough time and 19% hadn't taken any trips since 2015.

- Another 11% cited poor water quality.

- Of note, far fewer cited a complaint about Lake County. Rather, reasons for not visiting were more tied to time and not traveling (anywhere).

Table 6 – Reasons for Not Visiting Lake County in Past Two Years

	Total	Age	
		<60	60+
Base: Visited prior to 2016	**88**	**46**	**42**
Not enough time to go there again	26.1%	26.1%	26.2%
Haven't taken any other trips since 2015	19.3%	26.1%	11.9%
The lake water quality was/is poor	11.4%	13.0%	9.5%
Too far from home	8.0%	6.5%	9.5%
Had bad/inferior lodging	6.8%	8.7%	4.8%
Prefer to travel in other places	5.7%	4.3%	7.1%
Area isn't great/it's rundown	4.5%	4.3%	4.8%
Too expensive/poor value	4.5%	6.5%	2.4%
Not enough to see or do	2.3%	4.3%	0.0%
Other	42.0%	39.1%	45.2%

AN OFFER OR SPECIAL EVENT WOULD ATTRACT VISITORS TO RETURN

- In response to what might get past infrequent visitors to visit or revisit Lake County, 61% of respondents indicated they would for a special offer or discount, 38% would attend a special event here, 38% would visit with family or friends and 37% said if they heard about new things to see/do here .

Table 7 – What Could Motivate a Visit to Lake County

	Total	Age	
		<60	60+
Base: Never visited/visited prior to 2016	**138**	**59**	**78**
If I got a special offer or discounts	60.9%	54.2%	65.4%
For a special event held there	38.4%	40.7%	37.2%
If friends or family wanted to go there with me	37.7%	35.6%	38.5%
If I heard about new things to see and do there	37.0%	32.2%	39.7%
If I had more time to travel	32.6%	27.1%	35.9%
If the lake water was clean/clear	29.0%	22.0%	34.6%
If Konocti Harbor Resort & Spa or similar level resort would open	28.3%	25.4%	30.8%
If I knew it was improved	12.3%	8.5%	15.4%
Nothing - would not visit there or again	0.7%	1.7%	0.0%
Other	10.9%	10.2%	11.5%

FALL MOST PREFERRED SEASON TO VISIT LAKE COUNTY

- For the Total Fall was the preferred season by 36% with 30% coming in Summer.

- For guests staying in Lake County hotels, Fall is even more visited by 42% with 3% coming in Summer, However for those staying in private residences, 47% came in Winter.

- Seasonality also varies by activity types, perhaps not surprisingly, 56% of those engaging in land activities prefer Fall while 56% of those doing water activities prefer Summer.

- And by age, 39% of younger visitors came in Summer while 42% of older visitors came in Fall.

Table 8 – Season of Visit

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Valid Base: Visited 2016-18	150	64	30	48	59	34	51	62	85
Fall (October-December)	36.0%	42.2%	20.0%	45.8%	55.9%	17.6%	39.2%	27.4%	42.4%
Summer (July-September)	30.0%	32.8%	20.0%	31.3%	25.4%	55.9%	29.4%	38.7%	22.4%
Winter (January-March)	20.0%	9.4%	46.7%	12.5%	10.2%	11.8%	15.7%	21.0%	20.0%
Spring (April-June)	14.0%	15.6%	13.3%	10.4%	8.5%	14.7%	15.7%	12.9%	15.3%

HIGH SHARE OF REPEAT VISITATION

- Of note, 87% of visitors who came to Lake County in 2016 and/or 2017 also had made prior visits.

Table 9 – Prior Visitation

| | Total | Overnight Lodging | | | Activities | | | Age | |
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Valid Base: Visited 2016-18	**150**	**64**	**30**	**48**	**59**	**34**	**51**	**62**	**85**
Also visited before 2016 (as well as 2016-18)	87.3%	92.2%	96.7%	79.2%	93.2%	88.2%	88.2%	80.6%	91.8%
First visit in 2016 or 2017	12.7%	7.8%	3.3%	20.8%	6.8%	11.8%	11.8%	19.4%	8.2%

VISITOR COME FOR VACATION SOCIAL VISIT OR A SPECIAL EVENT

- A quarter of total visitors, 25% came to Lake County for a vacation/pleasure visit, 19% came to visit friends/relatives and 17% to attend a special event here, as their main purpose.

- Of note, 26% of Hotel guests came for a special event, while not surprisingly 66% of unpaid residence guests were socializing with friends/family.

Table 10 – Main Purpose for Visit to Lake County

| | Total | Overnight Lodging | | | Activities | | | Age | |
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Vacation/pleasure/to visit	24.5%	21.5%	13.9%	35.8%	18.0%	36.6%	29.5%	31.5%	17.4%
To visit relatives/friends/personal visit	19.0%	7.7%	66.7%	5.7%	14.8%	31.7%	27.9%	24.7%	15.1%
Attend a special event/festival	17.2%	26.2%	0.0%	20.8%	31.1%	4.9%	13.1%	12.3%	20.9%
Outdoor land recreation activities	10.4%	15.4%	2.8%	9.4%	24.6%	4.9%	3.3%	8.2%	11.6%
Outdoor water recreation activities	7.4%	7.7%	0.0%	9.4%	4.9%	14.6%	4.9%	2.7%	11.6%
Visit a winery/wine tasting	4.9%	4.6%	2.8%	7.5%	1.6%	2.4%	11.5%	4.1%	5.8%
Combining business/meeting and pleasure	3.7%	7.7%	0.0%	1.9%	0.0%	0.0%	3.3%	5.5%	2.3%
Passing through to another place	3.7%	3.1%	2.8%	3.8%	3.3%	2.4%	3.3%	4.1%	3.5%
Conduct business or attend a meeting	2.5%	1.5%	2.8%	1.9%	0.0%	0.0%	0.0%	1.4%	3.5%
Sightseeing/entertainment	1.8%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	1.4%	2.3%
Casino gaming/entertainment/events	1.8%	1.5%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	3.5%
Other	3.1%	3.1%	8.3%	0.0%	1.6%	2.4%	3.3%	4.1%	2.3%

OTHER TOP REASONS INCLUDE WINE TASTING & SIGHTSEEING

Respondents also indicated their *other* purposes for their visit to Lake County.

- While 34% came for vacation/pleasure visit as their other purpose, 25% also came for vine tasting, 25% to sightsee/explore the area and 21% for outdoor recreation.

Table 11 – Other Purposes for Visit to Lake County

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Vacation/pleasure/to visit	33.7%	30.8%	44.4%	34.0%	32.8%	43.9%	41.0%	32.9%	36.0%
Visit a winery/wine tasting	25.2%	24.6%	38.9%	24.5%	26.2%	31.7%	62.3%	26.0%	24.4%
Sightseeing/entertainment	24.5%	18.5%	30.6%	22.6%	32.8%	24.4%	27.9%	24.7%	24.4%
Outdoor land recreation activities	20.9%	18.5%	33.3%	18.9%	36.1%	26.8%	27.9%	23.3%	19.8%
Outdoor water recreation activities	19.6%	18.5%	30.6%	15.1%	23.0%	53.7%	29.5%	19.2%	19.8%
Attend a special event/festival	19.0%	26.2%	27.8%	13.2%	24.6%	24.4%	27.9%	15.1%	22.1%
To visit relatives/friends/personal visit	16.0%	13.8%	36.1%	11.3%	13.1%	22.0%	19.7%	16.4%	14.0%
Passing through to another place	9.2%	6.2%	5.6%	9.4%	9.8%	7.3%	3.3%	6.8%	11.6%
Casino gaming/entertainment/events	4.9%	0.0%	8.3%	7.5%	0.0%	2.4%	8.2%	5.5%	3.5%
Conduct business or attend a meeting	3.7%	6.2%	0.0%	3.8%	0.0%	2.4%	0.0%	5.5%	2.3%
Combining business/meeting and pleasure	3.1%	4.6%	2.8%	1.9%	0.0%	2.4%	1.6%	2.7%	3.5%
Other	4.9%	7.7%	8.3%	1.9%	4.9%	4.9%	1.6%	2.7%	7.0%
No other reason/No response	8.0%	9.2%	0.0%	9.4%	9.8%	2.4%	4.9%	4.1%	9.3%

VISITORS COME FOR VARIOUS REASONS

- When adding main + other purposes for visiting Lake County, 55% came for a vacation/pleasure visit.

- Another 33% attended a special event, with 29% here for a personal visit, also 29% for outdoor land activities, and 28% to visit a winery.

- As well, 25% were sightseeing and 25% came for outdoor water recreation.

- Thus visitors' main reason was a vacation, they engaged in various activities as part of the trip.

Table 12 – All Purposes for Visit to Lake County

| | Total | Overnight Lodging | | | Activities | | | Age | |
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Vacation/pleasure/to visit	54.6%	50.8%	58.3%	62.3%	50.8%	75.6%	68.9%	60.3%	50.0%
Attend a special event/festival	32.5%	46.2%	27.8%	28.3%	50.8%	29.3%	36.1%	24.7%	38.4%
To visit relatives/friends/personal visit	29.4%	20.0%	80.6%	15.1%	24.6%	43.9%	37.7%	32.9%	25.6%
Outdoor land recreation activities	28.8%	30.8%	33.3%	26.4%	57.4%	26.8%	31.1%	30.1%	27.9%
Visit a winery/wine tasting	28.2%	27.7%	41.7%	28.3%	27.9%	34.1%	68.9%	27.4%	29.1%
Sightseeing/entertainment	25.2%	18.5%	30.6%	24.5%	32.8%	24.4%	27.9%	24.7%	25.6%
Outdoor water recreation activities	25.2%	23.1%	30.6%	24.5%	26.2%	65.9%	32.8%	21.9%	27.9%
Passing through to another place	11.0%	9.2%	8.3%	11.3%	13.1%	9.8%	4.9%	9.6%	12.8%
Casino gaming/entertainment/events	6.1%	1.5%	8.3%	7.5%	0.0%	2.4%	8.2%	5.5%	5.8%
Conduct business or attend a meeting	6.1%	7.7%	2.8%	5.7%	0.0%	2.4%	0.0%	6.8%	5.8%
Combining business/meeting and pleasure	6.1%	10.8%	2.8%	3.8%	0.0%	2.4%	4.9%	6.8%	5.8%
Other	7.4%	10.8%	16.7%	1.9%	6.6%	7.3%	4.9%	5.5%	9.3%

FOR PLANNING VISITORS USE EXPERIENCE, REFERRAL, INTERNET

- Visitors' main sources of Lake County information when planning this trip were past experience/visit, by 43%, a family/friend referral by 25% and 24% used (any) Internet sources.

- Another 20% used the LakeCounty.com website, 18% received an e-mail from a specific area hotel or venue and 12% used the Lake County visitor guide. Thus many used locally based sources to plan this visit.

Table 13 – Lake County Trip Planning Sources

| | Total | Overnight Lodging | | | Activities | | | Age | |
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Own experience/been here before	42.9%	41.5%	41.7%	50.9%	45.9%	46.3%	50.8%	27.4%	58.1%
Family member/friend	25.2%	21.5%	44.4%	17.0%	26.2%	36.6%	27.9%	21.9%	27.9%
Lake County.com visitor web site	19.6%	21.5%	22.2%	15.1%	18.0%	14.6%	23.0%	17.8%	22.1%
Direct e-mail from the area, a venue or hotel	18.4%	26.2%	8.3%	20.8%	27.9%	9.8%	21.3%	13.7%	22.1%
Lake County Visitor Guide, "Destinations"	11.7%	12.3%	8.3%	15.1%	13.1%	7.3%	16.4%	6.8%	16.3%
Visit California Internet/web site	6.1%	1.5%	5.6%	9.4%	6.6%	7.3%	4.9%	6.8%	5.8%
Visitors bureau/chamber of commerce	6.1%	7.7%	2.8%	7.5%	3.3%	0.0%	4.9%	8.2%	4.7%
General travel website like travelocity.com	4.9%	7.7%	0.0%	1.9%	3.3%	4.9%	1.6%	5.5%	3.5%
Visit California Visitor Guide	4.3%	4.6%	5.6%	3.8%	4.9%	2.4%	4.9%	4.1%	4.7%
Hotel	4.3%	7.7%	0.0%	1.9%	4.9%	0.0%	3.3%	2.7%	5.8%
Newspaper or magazine	2.5%	4.6%	0.0%	1.9%	3.3%	0.0%	0.0%	2.7%	2.3%
Any Internet/mobile/social media	2.5%	0.0%	8.3%	1.9%	1.6%	7.3%	4.9%	5.5%	0.0%
Retail Guide books/Auto Club	1.8%	1.5%	0.0%	3.8%	0.0%	2.4%	1.6%	0.0%	3.5%
Other	9.8%	6.2%	11.1%	15.1%	11.5%	2.4%	9.8%	9.6%	10.5%
None/don't recall	9.2%	12.3%	8.3%	5.7%	8.2%	14.6%	4.9%	15.1%	2.3%
DK/No response	0.6%	0.0%	0.0%	1.9%	0.0%	2.4%	0.0%	1.4%	0.0%
Used Internet sources:	**23.9%**	**26.2%**	**22.2%**	**20.8%**	**21.3%**	**24.4%**	**26.2%**	**23.3%**	**24.4%**

LAKE COUNTY WEBSITE, GOOGLE MAIN ELECTRONIC SOURCES

- Again, 24% used Internet resources for Lake County information, of which 65% used the Lake County website, by far the most used electronic source.

- Another 47% used Google search, and 21% each used Facebook or an interactive rating site (e.g., Trip Advisor, Yelp).

Table 14 – Specific Electronic/Web Sources Used for Planning

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Used web sources	**43**	**17**	**11**	**12**	**14**	**13**	**19**	**21**	**21**
Lake County website	65.1%	76.5%	63.6%	66.7%	64.3%	69.2%	63.2%	47.6%	85.7%
Google search engine	46.5%	58.8%	36.4%	41.7%	57.1%	30.8%	52.6%	47.6%	47.6%
Facebook	20.9%	11.8%	27.3%	25.0%	7.1%	38.5%	21.1%	23.8%	19.0%
Trip Advisor/interactive travel website	20.9%	23.5%	18.2%	33.3%	21.4%	15.4%	15.8%	23.8%	19.0%
Travel website, e.g. expedia, travelocity	11.6%	17.6%	0.0%	16.7%	21.4%	0.0%	5.3%	14.3%	4.8%
Visit California website	11.6%	11.8%	18.2%	16.7%	14.3%	7.7%	15.8%	9.5%	14.3%
Other search engine	9.3%	5.9%	0.0%	8.3%	0.0%	0.0%	5.3%	14.3%	4.8%
Instagram	7.0%	0.0%	9.1%	16.7%	0.0%	15.4%	15.8%	14.3%	0.0%
Mobile app	2.3%	5.9%	0.0%	0.0%	7.1%	0.0%	0.0%	4.8%	0.0%
Dogtrekker.com	2.3%	0.0%	0.0%	8.3%	7.1%	0.0%	0.0%	4.8%	0.0%
Other Internet or mobile based source	4.7%	0.0%	18.2%	0.0%	0.0%	15.4%	5.3%	9.5%	0.0%
Other social media	2.3%	5.9%	0.0%	0.0%	7.1%	0.0%	0.0%	0.0%	4.8%

- By far, Lake County was the main trip destination for 86% of respondent visitors and few were visiting other areas, and this was consistent across segments.

Table 15 – Main Destination This Trip

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Lake County	85.9%	86.2%	86.1%	83.0%	86.9%	90.2%	85.2%	90.4%	81.4%
Other Northern California areas	4.3%	6.2%	5.6%	1.9%	6.6%	2.4%	1.6%	5.5%	3.5%
Multiple areas in California	3.1%	4.6%	2.8%	3.8%	0.0%	2.4%	1.6%	2.7%	3.5%
Napa or Sonoma Counties	1.8%	1.5%	2.8%	3.8%	1.6%	2.4%	3.3%	0.0%	3.5%
Central California	1.2%	1.5%	2.8%	0.0%	1.6%	0.0%	1.6%	0.0%	2.3%
San Francisco Bay and/or East Bay areas	0.6%	0.0%	0.0%	0.0%	1.6%	0.0%	1.6%	0.0%	1.2%
Southern California	0.6%	0.0%	0.0%	1.9%	0.0%	0.0%	1.6%	0.0%	1.2%
California and/or other Western States	0.6%	0.0%	0.0%	1.9%	1.6%	0.0%	0.0%	0.0%	1.2%
USA (California plus other areas)	0.6%	0.0%	0.0%	1.9%	0.0%	2.4%	1.6%	1.4%	0.0%
All other areas (not listed above)	1.2%	0.0%	0.0%	1.9%	0.0%	0.0%	1.6%	0.0%	2.3%

ALMOST ALL DROVE TO REACH LAKE COUNTY

- Almost all visitors, 97% arrived in Lake County by driving, of which 85% drove a personal vehicle and 11% used a rental vehicle.

- Again this behavior was relatively consistent across segments and not surprising as the area has no air service.

Table 16 – Arrival Mode into Lake County

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	163	65	36	53	61	41	61	73	86
Personal vehicle	85.3%	84.6%	80.6%	83.0%	90.2%	95.1%	75.4%	82.2%	87.2%
Rental vehicle	11.0%	13.8%	13.9%	5.7%	4.9%	4.9%	19.7%	16.4%	7.0%
RV/motorhome	2.5%	0.0%	5.6%	7.5%	3.3%	0.0%	3.3%	0.0%	4.7%
Public or private bus	0.6%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	1.4%	0.0%
Other	0.6%	1.5%	0.0%	1.9%	1.6%	0.0%	1.6%	0.0%	1.2%

VISITORS LIKE TO EAT OUT, LAND ACTIVITIES, WINERIES, SIGHTSEEING HERE

- Respondents were asked to indicate in which Lake County activities they engaged, from a list of specified activities. The results are discussed below and shown in the table on the next slide.

- Over 6 in 10 or 62% were eating in area restaurants, by far the most popular activity.

- Another 37% each were doing outdoor land activities (e.g., hiking, biking, etc.), visiting wineries/tasting, or sightseeing/exploring the area.

- More than one-quarter were visiting/socializing, by 29%, 28% attended a special event, 26% shopped and 25% did outdoor water activities (boating, swimming, water skiing, etc.).

- Hotel guests were more likely to be engaged in outdoor land activities, 40%, while 61% of private unpaid lodging guests visited wineries. As well, a high 80% share of winery visitors also ate out in restaurants.

- The higher share of activities by specific segments suggest opportunities for messaging and packaging.

TABLE - ACTIVITIES

Table 17 – Activities in Lake County

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	163	65	36	53	61	41	61	73	86
Eating in restaurants	62.0%	67.7%	72.2%	58.5%	65.6%	63.4%	80.3%	60.3%	65.1%
Outdoor land activities (hiking, biking/cycling, etc.)	37.4%	49.2%	38.9%	37.7%	100.0%	36.6%	42.6%	37.0%	37.2%
Visit wineries/wine tasting	37.4%	32.3%	61.1%	45.3%	42.6%	41.5%	100.0%	35.6%	39.5%
Sightseeing/exploring the area	36.8%	36.9%	38.9%	37.7%	36.1%	41.5%	52.5%	34.2%	39.5%
Visiting/socializing	29.4%	30.8%	52.8%	24.5%	39.3%	39.0%	31.1%	28.8%	30.2%
Attend a special event/holiday event	28.2%	29.2%	30.6%	34.0%	42.6%	24.4%	36.1%	31.5%	26.7%
Shopping	26.4%	27.7%	36.1%	22.6%	23.0%	24.4%	31.1%	26.0%	27.9%
Outdoor water activities (water ski, boating, etc.)	25.2%	23.1%	41.7%	20.8%	24.6%	100.0%	27.9%	30.1%	20.9%
Visit museums/galleries/antiquing	17.8%	13.8%	33.3%	17.0%	14.8%	22.0%	26.2%	17.8%	18.6%
Fishing	14.7%	10.8%	11.1%	22.6%	13.1%	26.8%	16.4%	11.0%	17.4%
Visit historic or architectural sites	13.5%	18.5%	22.2%	9.4%	21.3%	17.1%	21.3%	17.8%	10.5%
Casino/gaming	11.7%	10.8%	13.9%	15.1%	6.6%	7.3%	16.4%	13.7%	10.5%
Conduct business, attend a meeting	11.0%	16.9%	11.1%	5.7%	6.6%	9.8%	8.2%	13.7%	9.3%
Casino/entertainment or event	11.0%	12.3%	13.9%	13.2%	4.9%	12.2%	13.1%	9.6%	11.6%
RV or tent camping	9.2%	3.1%	5.6%	24.5%	14.8%	9.8%	11.5%	5.5%	12.8%
Bird watching	8.0%	7.7%	13.9%	5.7%	9.8%	9.8%	9.8%	8.2%	8.1%
Quilt Trail	4.3%	4.6%	8.3%	3.8%	4.9%	7.3%	9.8%	4.1%	4.7%
Rock hounding	3.7%	1.5%	13.9%	3.8%	4.9%	7.3%	6.6%	4.1%	3.5%
Off-Highway Vehicle activities	1.8%	1.5%	2.8%	0.0%	1.6%	0.0%	0.0%	2.7%	1.2%
Golfing	1.2%	3.1%	0.0%	0.0%	1.6%	0.0%	1.6%	2.7%	0.0%
Other area activities	8.6%	6.2%	13.9%	9.4%	8.2%	12.2%	11.5%	9.6%	7.0%
None of the above	1.2%	0.0%	2.8%	1.9%	0.0%	0.0%	0.0%	1.4%	1.2%

STRATEGIC CONSULTING | MARKET RESEARCH

Lakeport, Clear Lake & Kelseyville Most Popular Lake County Areas

Respondents indicated the specific areas of Lake County they visited on their trip, as discussed below and shown in the table on the next slide.

- Lakeport was by far the most visited area by two-thirds or 66% of visitors, while 46% each visited Clearlake and Kelseyville.

- Around one-third each visited Upper Lake, Nice and Lower Lake.

- More Hotel guests, 48% visited Upper Lake likely due to more/better hotels in that area. Far more private lodging guests, 78%, as well as 75% of outdoor land activity doers visited Lakeport.

- As well, 72% of those visiting wineries visited Lakeport, 66% of them visited Kelseyville, and 56% went to Clearlake.

- Visitors appear to have gone to a range of locales throughout the county, likely depending on their main purpose but also for their secondary purposes.

Table 18 – Lake County Areas Visited

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-2017	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Lakeport	65.6%	69.2%	77.8%	62.3%	75.4%	58.5%	72.1%	61.6%	69.8%
Clearlake	46.0%	47.7%	52.8%	43.4%	42.6%	51.2%	55.7%	46.6%	44.2%
Kelseyville	46.0%	50.8%	55.6%	49.1%	49.2%	41.5%	65.6%	45.2%	48.8%
Upper Lake	34.4%	47.7%	30.6%	34.0%	39.3%	36.6%	37.7%	32.9%	36.0%
Nice	31.3%	30.8%	25.0%	41.5%	41.0%	22.0%	32.8%	23.3%	38.4%
Lower Lake	30.7%	33.8%	22.2%	35.8%	27.9%	24.4%	34.4%	27.4%	33.7%
Lucerne	29.4%	32.3%	25.0%	32.1%	31.1%	31.7%	26.2%	19.2%	38.4%
Clear Lake Oaks	24.5%	20.0%	19.4%	32.1%	26.2%	22.0%	27.9%	26.0%	24.4%
Middletown	24.5%	20.0%	33.3%	28.3%	19.7%	14.6%	32.8%	26.0%	23.3%
Blue Lakes	16.0%	16.9%	22.2%	11.3%	13.1%	31.7%	11.5%	16.4%	15.1%
Clear Lake Riviera areas	15.3%	12.3%	22.2%	18.9%	18.0%	14.6%	18.0%	17.8%	14.0%
Cobb	11.7%	15.4%	19.4%	7.5%	8.2%	7.3%	16.4%	15.1%	9.3%
Hidden Valley	6.7%	6.2%	16.7%	7.5%	6.6%	7.3%	13.1%	4.1%	9.3%
Anderson Springs	6.1%	7.7%	16.7%	9.4%	14.8%	7.3%	14.8%	5.5%	7.0%
Glenhaven	4.3%	4.6%	2.8%	5.7%	6.6%	7.3%	9.8%	1.4%	7.0%
Finley	3.1%	4.6%	5.6%	1.9%	6.6%	0.0%	8.2%	2.7%	3.5%
Loch Lomand	3.1%	3.1%	5.6%	5.7%	3.3%	2.4%	4.9%	2.7%	3.5%
Other Lake County area	4.3%	3.1%	5.6%	3.8%	4.9%	7.3%	6.6%	0.0%	8.1%

CLEAR LAKE, STATE PARK & BLUE LAKES MOST POPULAR VENUES

- As to specific Lake County attractions, 80% visited them, of which 55% went to Clear Lake by far the most popular, 26% went to Clear Lake State Park and 20% to Blue Lakes.

- For Hotel guests Clear Lake also was the most popular, by 63%, while 23% also went to Mt. Konocti.

- Clear Lake State Park was also popular among Other paid lodging guests (mainly campers) with 38% of them visiting that park.

Table 19 – Specific Lake County Attractions Visited

| | Total | Overnight Lodging | | | Activities | | | Age | |
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Clear Lake	54.6%	63.1%	66.7%	49.1%	62.3%	56.1%	65.6%	54.8%	52.3%
Clear Lake State Park	25.8%	18.5%	36.1%	37.7%	36.1%	34.1%	29.5%	26.0%	25.6%
Blue Lakes	19.6%	20.0%	27.8%	18.9%	18.0%	36.6%	16.4%	21.9%	18.6%
Mt Konocti	15.3%	23.1%	27.8%	11.3%	24.6%	17.1%	21.3%	16.4%	15.1%
Land and water trails	12.9%	15.4%	13.9%	18.9%	21.3%	17.1%	16.4%	15.1%	11.6%
Anderson Marsh State Historic Park	11.7%	10.8%	16.7%	18.9%	18.0%	9.8%	18.0%	8.2%	15.1%
Rodman Slough County Park	8.0%	4.6%	16.7%	9.4%	14.8%	14.6%	11.5%	5.5%	10.5%
Mendocino National Forest	5.5%	7.7%	8.3%	5.7%	4.9%	7.3%	6.6%	8.2%	3.5%
Lake Pillsbury	4.9%	1.5%	5.6%	11.3%	1.6%	7.3%	0.0%	0.0%	9.3%
Highland Springs County Park	3.1%	1.5%	13.9%	0.0%	3.3%	9.8%	6.6%	5.5%	1.2%
Harbin Hot Springs	2.5%	4.6%	5.6%	1.9%	4.9%	2.4%	3.3%	2.7%	1.2%
Cow Mountain Recreational Area	2.5%	0.0%	5.6%	1.9%	3.3%	2.4%	3.3%	4.1%	1.2%
Berryessa Snow Mountain National Monument	0.6%	1.5%	2.8%	0.0%	1.6%	2.4%	1.6%	1.4%	0.0%
Indian Valley/Walker Ridge	0.6%	0.0%	0.0%	1.9%	0.0%	0.0%	1.6%	0.0%	1.2%
None of these	20.2%	13.8%	5.6%	24.5%	13.1%	2.4%	14.8%	17.8%	23.3%

VISITORS HIGHLY SATISFIED WITH LAKE COUNTY

- Overall, visitors were highly satisfied with Lake County as a destination, with **89%** extremely or very satisfied. The percentage satisfied is consistent across segments.

- Only 3% were unsatisfied with the destination.

- The overall mean rating was 4.2 (out of 5), and the means also are consistent across segments.

Table 20 – Satisfaction with Lake County as a Destination

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Extremely satisfied	39.3%	41.5%	38.9%	47.2%	39.3%	48.8%	41.0%	39.7%	39.5%
Very satisfied	49.7%	49.2%	47.2%	41.5%	50.8%	39.0%	47.5%	49.3%	48.8%
Extremely + Very satisfied:	89.0%	90.8%	86.1%	88.7%	90.2%	87.8%	88.5%	89.0%	88.4%
Somewhat satisfied	8.0%	6.2%	8.3%	9.4%	8.2%	9.8%	9.8%	8.2%	8.1%
Somewhat unsatisfied	1.8%	1.5%	0.0%	1.9%	0.0%	2.4%	0.0%	1.4%	2.3%
Very unsatisfied	1.2%	1.5%	5.6%	0.0%	1.6%	0.0%	1.6%	1.4%	1.2%
Mean Rating	**4.2**	**4.3**	**4.1**	**4.3**	**4.3**	**4.3**	**4.3**	**4.2**	**4.2**

SATISFACTION WITH ACTIVITIES, RELAXING AREA, FRIENDLINESS

Those who rated the area as extremely or very satisfying indicated their reasons

- 61% of visitors were highly satisfied with their activities, 60% found the area relaxing/ unhurried, 56% said the locals were friendly and 51% liked the lack of congestion/crowds.
- Those doing land activities were especially satisfied with their activities, mentioned by 83%, and 45% of those who did water activities found it great for families, as did 35% of those under age 60.
- Of winery visitors, 68% also liked the slower pace and 45% liked the area's cleanliness.

Table 21 – Reasons Why Satisfied

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Satisfied with Lake County	**158**	**63**	**34**	**52**	**60**	**40**	**60**	**71**	**83**
Like the activities i/we did	61.4%	63.5%	67.6%	63.5%	83.3%	62.5%	71.7%	52.1%	68.7%
Relaxing/unhurried/slow paced	59.5%	52.4%	73.5%	65.4%	61.7%	65.0%	68.3%	66.2%	55.4%
Friendly local people	55.7%	52.4%	58.8%	67.3%	60.0%	55.0%	63.3%	50.7%	61.4%
Uncrowded/uncongested	51.3%	49.2%	55.9%	50.0%	50.0%	55.0%	53.3%	54.9%	48.2%
Good value	36.1%	38.1%	32.4%	36.5%	41.7%	37.5%	40.0%	33.8%	39.8%
Clean environment	34.2%	34.9%	38.2%	42.3%	41.7%	32.5%	45.0%	32.4%	37.3%
Fun place	31.6%	34.9%	44.1%	32.7%	41.7%	42.5%	40.0%	35.2%	30.1%
Great for families	25.3%	19.0%	44.1%	26.9%	25.0%	45.0%	30.0%	35.2%	16.9%
Lots to see and do	23.4%	20.6%	32.4%	32.7%	26.7%	32.5%	33.3%	22.5%	25.3%
Romantic/good for couples	16.5%	11.1%	17.6%	23.1%	10.0%	25.0%	21.7%	23.9%	10.8%
Dog friendly/accommodating	13.9%	1.6%	26.5%	23.1%	13.3%	22.5%	18.3%	19.7%	8.4%
Was better than I expected	13.3%	15.9%	8.8%	11.5%	16.7%	5.0%	8.3%	16.9%	9.6%
Other	13.3%	11.1%	8.8%	15.4%	10.0%	10.0%	20.0%	11.3%	15.7%

FEW DISSATISFIED

- For the very few who were dissatisfied, water quality was cited as the main reason.

Table 22 – Why Dissatisfied with Lake County

	Total
Base: Dissatisfied with Lake County	**5**
Lake water quality was poor then	60.0%
Few things to see and do	20.0%
Rundown - things not well maintained	20.0%
Parking hard to find	20.0%
Other	40.0%

Visitors rated the importance of various factors when considering or visiting Lake County. The ratings are shown for the percentage that said extremely (5) or very (4) important on the next slide, and by the average mean for each item shown on the second next slide.

- The most important item was uncrowded/laid back rated as highly important by 80% with a mean rating of 4.02, affordability was next with 75% rating it highly important and a mean of 3.90, followed by being at the lake with 72% rating it highly important and a mean of 3.97.

- These three were by far the most important aspects when visitors were considering their trip to Lake County and are potentially the points that can be highlighted for media messaging.

TABLE – IMPORTANCE (%)

Table 23 – Rating of Importance Factors for Considering or Visiting Lake County
(percentage)

Percentage saying Extremely + Very Important	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Minimum Base: Visited 2016-18	**12**	**1**	**5**	**5**	**2**	**6**	**9**	**11**	**1**
An uncrowded and laid back place	79.6%	78.5%	82.9%	86.8%	80.3%	85.0%	80.0%	83.6%	76.7%
Affordability/great value	74.7%	73.8%	80.0%	71.7%	75.4%	82.5%	75.0%	78.1%	70.9%
Being at the lake	71.6%	72.3%	74.3%	75.5%	72.1%	95.0%	73.3%	74.0%	69.8%
Land-based activities	57.4%	55.4%	65.7%	56.6%	83.6%	45.0%	60.0%	56.2%	59.3%
Excellent regional cuisine/restaurants	54.3%	53.8%	60.0%	56.6%	54.1%	60.0%	60.0%	49.3%	60.5%
A close-by weekend get-away	52.5%	47.7%	65.7%	45.3%	54.1%	65.0%	53.3%	64.4%	44.2%
Activities for the whole family to enjoy	47.2%	38.5%	63.9%	56.6%	39.3%	68.3%	47.5%	50.7%	44.2%
Water based activities	45.1%	33.8%	62.9%	47.2%	41.0%	85.0%	41.7%	49.3%	41.9%
Wineries	38.3%	27.7%	54.3%	41.5%	31.1%	30.0%	73.3%	37.0%	40.7%
A romantic get-away	37.7%	32.3%	40.0%	41.5%	32.8%	45.0%	35.0%	47.9%	30.2%
Fishing	33.3%	0.0%	40.0%	20.0%	50.0%	33.3%	33.3%	27.3%	100.0%
Casino gaming	13.0%	6.2%	11.4%	17.0%	0.0%	5.0%	11.7%	15.1%	11.6%

TABLE – IMPORTANCE (MEAN)

Table 24 – Rating of Importance Factors for Considering or Visiting Lake County
(mean ratings out of 5)

Mean rating: 5=Most important → 1=No importance	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
An uncrowded and laid back place	4.02	3.98	4.06	4.15	4.07	4.20	4.03	4.14	3.93
Being at the lake	3.97	4.00	4.11	4.02	4.00	4.73	3.98	4.01	3.95
Affordability/great value	3.90	3.85	4.03	3.92	3.89	4.08	3.83	3.96	3.84
Land-based activities	3.60	3.63	3.71	3.66	4.25	3.38	3.65	3.58	3.64
Excellent regional cuisine/restaurants	3.29	3.28	3.49	3.32	3.31	3.33	3.45	3.26	3.37
A close-by weekend get-away	3.20	3.15	3.51	2.98	3.30	3.58	3.10	3.53	2.95
Water based activities	3.11	2.77	3.63	3.19	2.89	4.25	3.07	3.26	3.01
Activities for the whole family to enjoy	3.02	2.77	3.53	3.28	2.80	3.61	2.97	3.12	2.93
A romantic get-away	2.78	2.68	2.77	3.00	2.69	2.95	2.70	3.08	2.58
Wineries	2.74	2.46	3.03	2.92	2.51	2.50	3.80	2.74	2.79
Fishing	2.50	1.00	3.00	1.80	3.50	2.83	2.56	2.27	5.00
Casino gaming	1.70	1.42	1.71	1.91	1.28	1.63	1.62	1.82	1.62

Overnight Stays and Spending

NEARLY 9 IN 10 STAYED OVERNIGHT IN LAKE COUNTY

- Overall, all visitors stayed were away for an average of 9.0 nights (all destinations on their trip).

- Of *all* Lake County visitors, 88% stayed overnight here and all stayed here an average of 2.9 nights.

- *Overnight* Lake County visitors stayed an average of 3.2 nights.
  - Lake County hotel guests stayed 2.8 nights, private unpaid lodging (VFR) guests stayed 5 nights, and other paid lodging guests stayed 3.9 nights.

Table 25 – Overnight Stays and Nights

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
% staying overnight in...									
Lake County	**87.7%**	**100.0%**	**97.2%**	**94.3%**	**95.1%**	**97.6%**	**95.1%**	**80.8%**	**93.0%**
Northern California	49.1%	44.6%	55.6%	54.7%	39.3%	41.5%	42.6%	45.2%	52.3%
All other locations/destinations	32.5%	29.2%	25.0%	52.8%	36.1%	31.7%	27.9%	24.7%	39.5%
Base: Visited 2016-2017	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Mean total nights	9.04	8.25	10.81	12.66	9.43	9.68	10.16	8.82	9.45
All other locations/destinations	3.14	2.58	2.06	5.72	3.10	2.56	3.43	2.82	3.53
Northern California	2.96	2.85	3.89	3.30	3.26	3.49	3.08	3.12	2.92
Lake County	**2.94**	**2.82**	**4.86**	**3.64**	**3.07**	**3.63**	**3.66**	**2.88**	**3.00**
Base: Overnight visitors	**150**	**65**	**35**	**50**	**58**	**40**	**58**	**64**	**82**
Total	9.83	8.25	11.11	13.42	9.91	9.93	10.69	10.06	9.91
All other locations/destinations	3.41	2.58	2.11	6.06	3.26	2.63	3.60	3.22	3.71
Northern California	3.22	2.85	4.00	3.50	3.43	3.58	3.24	3.56	3.06
Lake County	**3.19**	**2.82**	**5.00**	**3.86**	**3.22**	**3.73**	**3.84**	**3.28**	**3.15**

HOTEL/MOTEL PREFERRED LODGING FOR *ALL* VISITORS

- Overall, 88% of Lake County visitors stayed overnight and 12% were here for the day only.

- Of all visitors, 40% stayed in a Lake County hotel/motel, 22% were in a private residence 8% were camping, and of note, 7% used an on-line shared rental like Airbnb.

Table 26 – Lodging Type in Lake County – All Visitors

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Valid Base: all Lake County Visitors	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Hotel or motel	39.9%	100.0%	11.1%	5.7%	52.5%	36.6%	34.4%	37.0%	40.7%
Private home/condo of friends/family	22.1%	6.2%	100.0%	5.7%	23.0%	36.6%	36.1%	27.4%	17.4%
RV or tent campground	8.0%	0.0%	2.8%	24.5%	13.1%	9.8%	8.2%	4.1%	11.6%
Vacation rental like AirBnB, VRBO, HomeAway	6.7%	3.1%	0.0%	20.8%	4.9%	7.3%	9.8%	8.2%	5.8%
Vacation/rental home/apartment (non-AirBnB)	4.9%	0.0%	2.8%	15.1%	4.9%	2.4%	4.9%	1.4%	8.1%
Rental cabin	4.3%	0.0%	2.8%	13.2%	3.3%	4.9%	6.6%	5.5%	3.5%
Other lodging	9.2%	1.5%	0.0%	28.3%	6.6%	2.4%	11.5%	8.2%	10.5%
Did not stay overnight in Lake County; there for the day only	11.7%	0.0%	0.0%	0.0%	4.9%	4.9%	3.3%	13.7%	10.5%

HOTEL/MOTEL PREFERRED LODGING FOR OVERNIGHT VISITORS

- Of the 88% who stayed overnight, nearly half or 46% stayed in a Lake County Hotel/motel, while 25% lodged in a residence of family/friends, 9% camped and 8% used an on-line vacation rental like Airbnb.

Table 27 – Lodging Type in lake County – Overnight Visitors

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Overnight Visitors to Lake Co	143	65	35	50	58	40	58	59	80
Hotel or motel	45.5%	100.0%	11.4%	6.0%	55.2%	37.5%	36.2%	45.8%	43.8%
Private home/condo of friends/family	24.5%	6.2%	100.0%	6.0%	22.4%	37.5%	37.9%	32.2%	18.8%
RV or tent campground	9.1%	0.0%	2.9%	26.0%	13.8%	10.0%	8.6%	5.1%	12.5%
Vacation rental like AirBnB, VRBO, HomeAway	7.7%	3.1%	0.0%	22.0%	5.2%	7.5%	10.3%	10.2%	6.3%
Vacation/rental home/apartment (non-AirBnB)	5.6%	0.0%	2.9%	16.0%	5.2%	2.5%	5.2%	1.7%	8.8%
Rental cabin	4.9%	0.0%	2.9%	14.0%	3.4%	5.0%	6.9%	6.8%	3.8%
Other lodging	8.4%	1.5%	0.0%	24.0%	6.9%	2.5%	8.6%	5.1%	11.3%
Did not stay overnight in Lake County; there for the day only	2.1%	0.0%	0.0%	0.0%	1.7%	2.5%	1.7%	0.0%	3.8%

LODGING GUESTS RESERVED 8 WEEKS IN ADVANCE

- Overall 95% of Lake County overnight paid lodging guests made an advance reservation.

- These Lake County paid lodging guests reserved nearly 8 weeks on average in advance of their visit here.

- Hotel and other paid lodging guests tended to do so longer in advance again about 8 weeks versus private lodging at 5 weeks.

- Of note those over 60 reserved about twice as far in advance, nearly 10 weeks versus those under 60 at nearly 5 weeks.

Table 28 – Advance Paid Lodging Reservation Period

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Overnight hotel visitors	89	65	6	27	39	21	32	37	49
More than 12 weeks	30.3%	32.3%	16.7%	29.6%	43.6%	28.6%	50.0%	10.8%	44.9%
3-4 weeks	18.0%	15.4%	16.7%	22.2%	17.9%	14.3%	18.8%	24.3%	10.2%
2 weeks	12.4%	13.8%	0.0%	11.1%	2.6%	9.5%	9.4%	10.8%	14.3%
9-12 weeks	12.4%	10.8%	0.0%	14.8%	17.9%	9.5%	6.3%	10.8%	14.3%
1 week	11.2%	9.2%	16.7%	14.8%	7.7%	14.3%	6.3%	21.6%	4.1%
5-8 weeks	11.2%	12.3%	33.3%	7.4%	7.7%	9.5%	6.3%	10.8%	12.2%
0 (Didn't plan ahead/decided/reserved here)	4.5%	6.2%	16.7%	0.0%	2.6%	14.3%	3.1%	10.8%	0.0%
Mean number of weeks	7.6	7.7	5.4	7.6	9.7	6.7	9.5	4.7	9.7

ALMOST ALL VISITOR GROUPS SPENT IN LAKE COUNTY

- Overall 98% of Lake County visitor groups spent in the area that day on their trip.

- Nearly 88% spent on meals out/snacks, by far the highest incidence category.

- Then 66% spent on groceries /personal items, 61% bought drinks/beverages, 54% spent on local transportation and 50% spent on paid lodging.

Table 29 – Spending Incidence (percent of groups that spent)

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Meals out/snacks	87.7%	90.8%	86.1%	92.5%	91.8%	85.4%	90.2%	86.3%	90.7%
Groceries/personal items	66.3%	67.7%	61.1%	77.4%	65.6%	63.4%	68.9%	68.5%	65.1%
Drinks/beverages	61.3%	58.5%	61.1%	67.9%	60.7%	63.4%	72.1%	68.5%	57.0%
Transportation (gas, bus, parking, etc.)	54.0%	58.5%	52.8%	56.6%	62.3%	48.8%	55.7%	46.6%	62.8%
Overnight paid lodging (per night only in Lake County)	49.7%	89.2%	8.3%	49.1%	60.7%	46.3%	45.9%	45.2%	53.5%
Shopping/Gifts/Souvenirs	41.1%	41.5%	44.4%	49.1%	37.7%	36.6%	44.3%	38.4%	44.2%
Wine tasting/purchase	35.0%	32.3%	41.7%	45.3%	42.6%	31.7%	77.0%	30.1%	40.7%
Recreation/activity gear or equipment rental or purchase	16.0%	21.5%	5.6%	20.8%	29.5%	22.0%	13.1%	15.1%	17.4%
Admission/permit fees/licenses	16.0%	13.8%	19.4%	18.9%	23.0%	24.4%	14.8%	15.1%	17.4%
Casino gaming/entertainment	14.7%	13.8%	8.3%	20.8%	4.9%	9.8%	13.1%	19.2%	11.6%
Non casino entertainment	8.0%	10.8%	11.1%	7.5%	11.5%	14.6%	9.8%	8.2%	7.0%
None of these	1.8%	0.0%	5.6%	0.0%	0.0%	4.9%	1.6%	1.4%	1.2%

EACH GROUP AVERAGED $277 SPENT PER-DAY

- Overall each Lake County visitor group spent an average of $277 daily in Lake County.

- They averaged $69 for overnight lodging $57 for meals out/snacks the top two categories, as well as $32 on wine, $30 on groceries/personal items and $22 on transportation. Note spending is allocated to all visitors even if they did not spend in that category.

- Hotel guest groups spent the most averaging $339 per day, while guests in unpaid lodging spent the least, $189, with not surprisingly, more on groceries, $49 than other segments.

Table 30 – Daily Spending per Visitor *Group* in Lake County

Mean spending	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	163	65	36	53	61	41	61	73	86
Total ($)	276.8	338.9	189.4	324.9	275.9	238.8	332.1	266.8	293.3
Overnight paid lodging (night in Lake County)	69.0	118.6	9.0	70.4	74.2	56.5	72.6	58.1	80.4
Meals out/snacks	57.2	65.8	46.8	67.9	56.1	50.1	67.8	53.7	66.0
Wine tasting/purchase	32.4	32.6	28.2	44.9	34.9	19.5	79.8	30.1	36.2
Groceries/personal items	29.5	22.3	35.1	49.5	28.7	23.8	33.2	31.3	30.2
Transportation (gas, parking, etc.)	22.3	24.5	17.9	26.2	25.6	18.1	21.3	19.7	24.3
Drinks/beverages	18.5	15.9	22.2	17.7	15.6	23.0	21.9	24.7	14.4
Shopping/Gifts/Souvenirs	17.0	18.0	15.4	20.5	11.4	12.5	26.6	20.0	16.9
Casino gaming/entertainment	12.6	11.0	4.2	16.8	2.7	8.7	14.2	14.1	11.5
Recreation/activity gear or equipment rental or purchase	9.5	11.3	6.3	13.1	14.0	22.2	13.2	10.3	9.0
Admission/permit fees/licenses	5.8	4.3	4.7	7.5	10.7	4.5	5.2	5.5	6.0
Non casino entertainment	3.8	5.8	2.6	3.4	4.0	7.9	2.2	3.6	2.8

PER-CAPITA DAILY SPENDING AVERAGED $128

- Overall visitors spent for an average of 2.15 persons per group (not group size). This results in average daily spending of $128 per-capita.

- Each visitor averaged $31 in lodging spending, and $27 for meals out/snacks the top two categories.

Table 31 – Per-Capita Daily Spending in Lake County

Mean spending	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**160**	**65**	**34**	**53**	**61**	**39**	**60**	**72**	**85**
Total ($)	128.2	163.5	85.5	143.4	130.6	109.3	156.0	117.9	139.2
Overnight paid lodging (night in Lake County)	31.9	59.6	4.0	31.1	35.3	26.9	33.5	25.9	37.5
Meals out/snacks	27.2	31.9	20.6	28.7	27.5	24.2	30.0	25.3	30.6
Wine tasting/purchase	14.2	14.6	12.4	18.3	15.5	8.2	34.6	12.4	16.6
Groceries/personal items	13.4	10.5	15.5	19.5	13.2	11.1	15.6	14.0	14.5
Transportation (gas, parking, etc.)	9.8	10.9	7.6	10.8	11.2	7.4	10.2	8.5	11.6
Drinks/beverages	8.9	7.7	10.1	8.4	8.2	10.9	10.3	11.3	7.1
Shopping/Gifts/Souvenirs	8.1	8.6	6.8	9.3	5.7	5.6	12.4	9.1	8.4
Casino gaming/entertainment	5.6	5.3	1.8	7.4	1.3	4.1	6.6	6.3	5.1
Recreation/activity gear or equipment rental or purchase	4.3	5.1	2.7	5.2	6.5	10.5	6.1	4.3	4.5
Admission/permit fees/licenses	2.6	2.1	2.1	3.0	4.8	1.8	2.4	2.5	2.7
Non casino entertainment	1.8	2.8	1.1	1.5	1.9	3.7	1.0	1.6	1.3
Mean number spending for	2.15	1.97	2.44	2.23	2.00	2.10	2.08	2.25	1.98

Visitor Travel Group Composition and Demographics

HALF OF VISITORS TRAVELING AS A COUPLE

- Nearly half or 48% of Lake County visitor groups were couples, and 21% were traveling in a family group, with 15% groups of friends or co-workers, while 12% were traveling alone.

- Far more of those under age 60 were families 29% versus 14% of those over age 60, who were more likely to be couples.

Table 32 – Travel Group Type

| | Total | Overnight Lodging | | | Activities | | | Age | |
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
A couple	47.9%	50.8%	41.7%	49.1%	45.9%	41.5%	49.2%	43.8%	52.3%
A family group	20.9%	13.8%	33.3%	18.9%	18.0%	31.7%	18.0%	28.8%	14.0%
A group of friends or co-workers	14.7%	18.5%	8.3%	18.9%	24.6%	9.8%	18.0%	11.0%	17.4%
Alone	11.7%	12.3%	11.1%	7.5%	9.8%	9.8%	6.6%	9.6%	14.0%
A mixed group of family and friends	3.7%	3.1%	2.8%	5.7%	1.6%	4.9%	6.6%	5.5%	2.3%
Other	0.6%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%
DK/No response	0.6%	0.0%	2.8%	0.0%	0.0%	2.4%	1.6%	0.0%	0.0%

ALL GROUPS AVERAGED 2.0 PERSONS

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- Lake County visitor groups averaged 2.0 persons per their immediate travel party.

- Of the total about 1.5 – 2.0 persons per group were adults.

- Other paid lodging guests had the largest groups averaging 2.3 persons while the smallest groups were those under age 60, 1.4 persons and private resident guests at 1.5 persons.

Table 33 – Visitor Group Size – Number of Persons

Mean number of people per visitor group	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base: Visited 2016-18	**163**	**65**	**36**	**53**	**61**	**41**	**61**	**73**	**86**
Total	2.02	2.05	1.94	2.62	2.28	2.39	2.08	1.77	2.40
Age 0-5	0.03	0.02	0.08	0.02	0.03	0.07	0.02	0.05	0.01
Age 6-12	0.12	0.06	0.22	0.13	0.07	0.24	0.13	0.19	0.07
Age 13-18	0.15	0.20	0.25	0.09	0.13	0.17	0.07	0.18	0.13
Age 19+	1.74	1.63	1.53	2.30	1.92	2.00	1.89	1.44	2.19

MEDIAN AGE OF 61

- The overall median respondent age was 61.

- Age was slightly lower for those engaging in outdoor water activity while the oldest segment at median age of 63 was other paid lodging guests.

Table 34 – Respondent Age

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Valid Base:	296	62	35	53	59	40	60	132	164
18-29	0.7%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	1.5%	0.0%
30-39	8.4%	8.1%	20.0%	9.4%	6.8%	15.0%	11.7%	18.9%	0.0%
40-49	10.5%	12.9%	8.6%	11.3%	16.9%	17.5%	10.0%	23.5%	0.0%
50-59	25.0%	22.6%	28.6%	15.1%	22.0%	22.5%	21.7%	56.1%	0.0%
60+	55.4%	56.5%	42.9%	62.3%	54.2%	45.0%	56.7%	0.0%	100.0%
Median age:	61.0	61.3	57.0	62.6	60.7	57.3	61.3	50.6	67.3

3 IN 10 VISITOR HOUSEHOLDS HAVE CHILDREN AT HOME

- Overall 72% of Lake County visitors have no children in their household.

- For those who do, 10% have children over age 19 and 9% are age 6 -10.

Table 35 – Children in Household and Ages

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base:	301	65	36	53	61	41	61	132	164
Age 0-5	5.0%	9.2%	8.3%	1.9%	3.3%	9.8%	1.6%	10.6%	0.6%
Age 6-12	9.0%	9.2%	8.3%	5.7%	3.3%	9.8%	8.2%	17.4%	2.4%
Age 13-18	10.3%	16.9%	8.3%	9.4%	11.5%	7.3%	9.8%	18.9%	3.0%
No children in household	71.8%	70.8%	72.2%	71.7%	72.1%	65.9%	72.1%	52.3%	87.8%
Age 19+	9.6%	12.3%	5.6%	5.7%	9.8%	4.9%	3.3%	11.4%	7.9%
DK/No response	2.0%	0.0%	2.8%	7.5%	1.6%	4.9%	8.2%	3.0%	0.6%

8 IN 10 IDENTIFY AS CAUCASIAN

- Overall the vast majority, 79% of visitors (who are U.S. residents) identify as Caucasian (non-Hispanic/Latino).

- Another 5% are Asian-American, 4% are Hispanic/Latino and 3% each African-American and Native American.

- Among those under 60, 8% identify as Hispanic, twice the share as compared to the total.

Table 36 – Ethnicity/Race

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Valid Base: U.S. resident	**298**	**65**	**35**	**52**	**61**	**41**	**59**	**131**	**162**
Caucasian (non-Hispanic/Latino)	78.5%	80.0%	74.3%	75.0%	78.7%	73.2%	78.0%	76.3%	80.9%
Asian-American	4.7%	1.5%	2.9%	0.0%	3.3%	2.4%	0.0%	6.1%	3.7%
Hispanic/Latino	4.4%	9.2%	5.7%	3.8%	1.6%	4.9%	1.7%	8.4%	1.2%
African-American	3.0%	3.1%	5.7%	1.9%	3.3%	9.8%	1.7%	2.3%	3.7%
Native American	2.7%	1.5%	5.7%	1.9%	3.3%	7.3%	3.4%	3.1%	2.5%
Pacific Islander	2.3%	3.1%	5.7%	0.0%	0.0%	2.4%	1.7%	3.1%	1.9%
Other	2.3%	1.5%	0.0%	3.8%	3.3%	2.4%	0.0%	2.3%	2.5%
Prefer not to state	9.7%	10.8%	14.3%	13.5%	11.5%	12.2%	11.9%	7.6%	11.1%
DK/No response	0.7%	0.0%	2.9%	1.9%	0.0%	4.9%	3.4%	0.8%	0.0%

- Visitors reported their median annual household income at $92,700.

- The highest income was reported for visitors doing outdoor land activities, $105,300, with those under age 60 with incomes at $102,300 and guests in unpaid lodging at $100,000.

Table – Annual Household Income

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Valid Base:	254	58	34	41	54	34	52	118	134
Under $30,000	14.2%	3.4%	8.8%	2.4%	3.7%	8.8%	3.8%	6.8%	20.1%
$30,000 - $49,999	5.9%	10.3%	8.8%	7.3%	7.4%	8.8%	7.7%	8.5%	3.7%
$50,000 - $74,999	16.5%	12.1%	17.6%	24.4%	16.7%	20.6%	21.2%	14.4%	18.7%
$75,000 - $99,999	18.9%	25.9%	14.7%	22.0%	20.4%	20.6%	19.2%	19.5%	18.7%
$100,000 - $199,999	34.6%	34.5%	35.3%	39.0%	35.2%	32.4%	38.5%	36.4%	32.8%
$200,000 - $500,000	9.1%	13.8%	14.7%	2.4%	16.7%	8.8%	7.7%	12.7%	6.0%
Over $500,000	0.8%	0.0%	0.0%	2.4%	0.0%	0.0%	1.9%	1.7%	0.0%
Median income (USD):	$92,708	$98,333	$100,000	$93,056	$105,263	$89,286	$97,500	$102,326	$85,000

- 54% of total respondents were female and 46% were male, thus skewed to female.

Table 37 – Respondent Gender

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base:	301	65	36	53	61	41	61	132	164
Female	54.2%	50.8%	75.0%	50.9%	50.8%	80.5%	63.9%	62.9%	47.6%
Male	45.8%	49.2%	22.2%	50.9%	49.2%	19.5%	34.4%	37.9%	52.4%
DK/No Response	0.3%	0.0%	2.8%	0.0%	0.0%	2.4%	1.6%	0.0%	0.0%

* this represented respondents; actual visitor composition may be different.

Appendix

- Approach and Sample
- How to Read the Tables

Approach

- To obtain the data necessary to meet the study objectives an *Internet* survey of Lake County visitors was developed.
  - To increase the sample thirteen on-site intercept surveys also were conducted.

Sample
- The survey sample came from the Lake County visitor database; that is, anyone who left their e-mail on the Lake County destination website for a visitor guide, for any other requests or in any other media.

- Contacts in the database for the past 3 years (reported at 6,000 in the County of Lake office)

- Visitors received an e-mail sent by Lake County asking for their participation with a link to access the survey.

- Questions covered various aspects of their most recent trip to Lake County (in the past three years).

Sample Size
- Overall 301 people answered the survey. Of these 46% had never visited Lake County while 54% had thus the base of 163 are those who had visited in 2016, 2017 or 2018.

Reading the Report Tables

- Each table in the report has a heading, with some or all of the following columns:

	Total	Overnight Lodging			Activities			Age	
		Hotel/ Motel	Private (unpaid)	Other Lodging (paid)	Outd. Land	Outd. Water	Wine	<60	60+
Base:	**301**	**65**	**36**	**53**	**61**	**41**	**61**	**132**	**164**
0/Never	45.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	44.7%	47.6%
1 time	10.0%	21.5%	2.8%	17.0%	16.4%	7.3%	16.4%	13.6%	7.3%
2-5 times	26.2%	50.8%	52.8%	56.6%	57.4%	56.1%	59.0%	22.0%	28.7%

- The bold numbers below the header are the "base" number of respondents per group
- **Total:** Total respondent base for the study
- **Overnight Lodging**: where visitors lodged overnight –staying in a hotel or motel, private (unpaid) residence, e.g. VFR, or other paid lodging e.g., camping or vacation rental (the base was too small to show Day visitors).
- **Activity Type**: respondents indicating participating outdoor land activities, outdoor water activities or wine tasting
- **Age**: respondent reporting age as under age 60 or over age 60

- To compare segments read across columns; to view the segment characteristics read down the column.

- In the tables, statistical differences between these groups are indicated by a highlight of either purple or blue (higher/lower than average), as shown in the sample table above.

- The total visitor sample of 301 has an error factor of +/- 5.6%
- The actual visitor sample of 163 has an error factor of +/- 7.7%

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