



Global Trends in Sustainable Tourism

Case Study: Visit Lake Tahoe

Presenters

Cathy Ritter, Founder of Better Destinations
Trustee, The Travel Foundation

Carol Chaplin, President & CEO Lake Tahoe Visitors Authority



Go West
SUMMIT

Rethinking Tourism

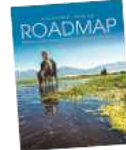
A presentation for Go West

 **Better**
Destinations LLC

February 26, 2024

A Different Perspective

- Founded Better Destinations in 2021 to provide expert resources to destinations, especially relating to sustainable and regenerative tourism and destination development.
- Draw upon nearly a decade of experience as state tourism director for both Colorado and Illinois.
- Led creation of the Colorado Tourism Roadmap in 2017 -- often credited with inspiring a national movement toward sustainable tourism.
- Serve as a Trustee of the Travel Foundation.



'ARE YOU COLO-READY?' DESTINATION STEWARDSHIP PLAN



Since March 15, 2017, the Colorado Tourism Office (CTO) has been guided by the Colorado Tourism Roadmap, which spells out a strategic plan for the state's tourism industry. The Roadmap's **STEWARDSHIP** Pillar aims to **Protect the integrity of Colorado resources through sustainable tourism** via the following objectives:



Town of Vail



Tahoe Regional Planning Authority



Destination Missoula



Hawai'i Tourism Authority



Grand County/Moab UT



Travel Nevada



**The pressures are
mounting.**



Overtourism is expected to hit all-time highs in 2024. International arrivals are on track to exceed all prior recorded levels.

Source: WTO



Skift Take:

Tourism boards embracing a “locals first” approach post-pandemic is here to stay, as is the imperative of having residents’ input on tourism management to ensure the industry’s future success. That’s because locals will become increasingly engaged in the future of their home, just as travelers will continue to seek sustainable, inclusive options.

**Places around
the globe are
responding.**



In 2024, Venice will charge day-trippers 5 euros to enter the city on 30 peak tourism days.



Greece is collecting a climate resilience levy of 1 to 4 euros a night from May to October. Proceeds will help pay for recovery from wildfires and floods.



Amsterdam's tourism goals focus on making the city more livable for locals and enjoyable for travelers.



In Colorado, up to 90% of lodging taxes now can be spent for purposes other than tourism promotion.



Japan is creating tourist-only shuttles and adding transit infrastructure to address traffic jams in cities and on Mt. Fuji.



A Strategic Road Map for the NEXT Generation of Destination Organizations

August 7, 2023







DESTINATION
NEXT



DESTINATIONS
INTERNATIONAL



NextFactor

KPI	Current	Future
Economic impact of tourism	1	1
Overnight visitation	2	3
Stakeholder support and business development	3	10
Room nights generated	4	8
Number of visitors/delegates	5	5
Visitor satisfaction	6	2 
Marketing ROI	7	4 
Member/partner satisfaction	8	6 
Social media metrics	9	13
Community benefits and social impacts	10	9
Leads/referrals to business	11	12
Hotel performance metrics	12	14
Resident sentiment	13	7 
Earned media metrics	14	16
Equity, diversity, and inclusion	15	11
Long-term/legacy impacts from events	16	17
Conversion metrics	17	15
Environmental stewardship impacts	18	18
Air service	19	19
Event bid success ratio	20	20
Member satisfaction	21	

MESSAGE FROM ICELANDIC TOURIST BOARD

OutHorse your email.

EMAIL REPLY:

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Inspired by
Iceland



0:17 / 0:54



**A shift:
Destinations are moving
from building tourism to
building support for tourism.**

A Range of Planning Approaches



Destination Master Plan: Identifies strategies to attract and serve visitors, enhance a destination's image as a dynamic place to visit, and build organizational strength.



Destination Development Plan: Focuses on enhancing experiences or infrastructure to attract visitors, generate economic impact, and build capacity of organization and partners.



Destination Management Plan: Identifies destination-led strategies to create quality visitor experiences and manage visitor impacts, often in partnership with other key stakeholders.



Destination Stewardship Plan: With a 'community-first,' regenerative mindset, supports shaping a thriving tourism economy that addresses local priorities and improves unique assets.



DESTINATION DEVELOPMENT

Park City is planning ahead for the 2034 Olympics.

DESTINATION MANAGEMENT

Moab is undertaking a Sustainable Tourism, Economic Diversification, Asset-Based Community Development Strategic Plan.



**DESTINATION
STEWARDSHIP**

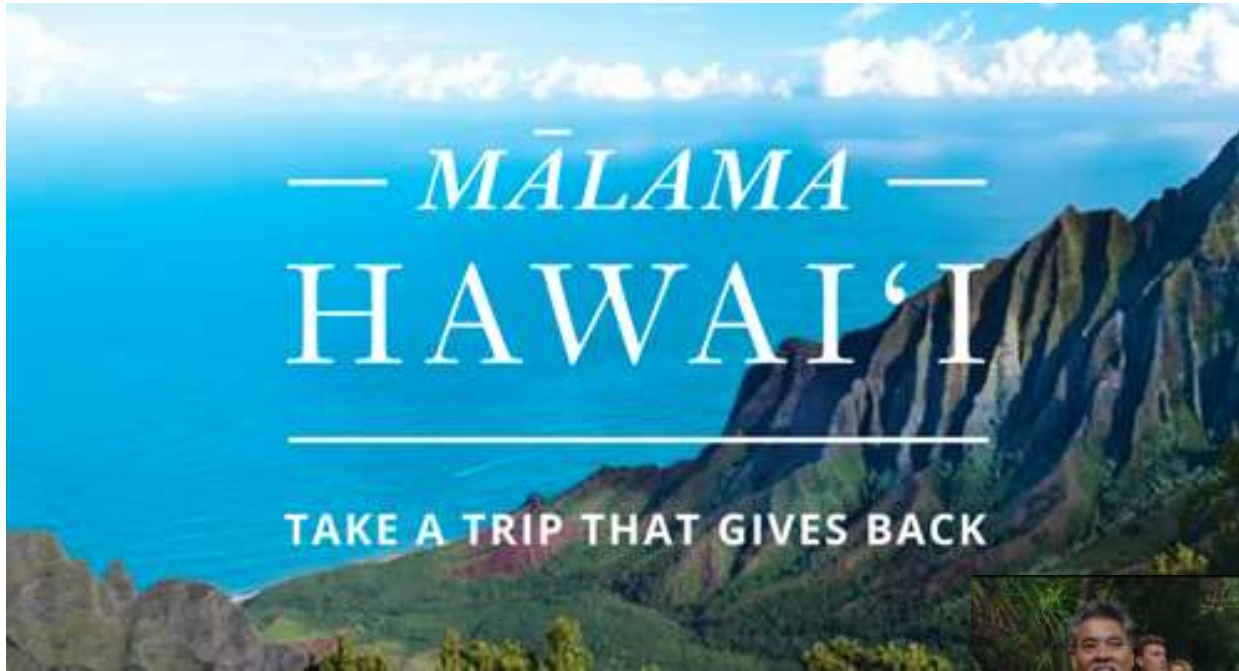
**Missoula is pioneering a new philosophy
of tourism management.**



**DESTINATION
STEWARDSHIP**

**Lake Tahoe is fostering a tourism
economy that gives back.**

Hawai'i Tourism Authority now pinning its future on outcomes of a Governance Study.



An aerial night photograph of a mountain town, likely Vail, Colorado. The town is nestled in a valley, with its buildings illuminated by warm yellow and orange lights. In the foreground, a large building is decorated with vibrant, multi-colored light displays. A highway with light trails from passing vehicles runs through the lower right. The background features steep, snow-covered mountains under a twilight sky with soft purple and pink hues.

**In its new Roadmap, Vail embraced
'Community-Positive' Tourism.**

**What kind of
destination do you
want to be?**

The High-Value Traveler

- It's not always about generating the highest Return on Investment.
- Define 'High-Value' by what's important to your destination.
 - 'Drivers of dispersion'
 - The low-impact traveler
 - Diverse traveler audiences, including people of all abilities



The 'Good Travel' Initiative

- Focuses on certifying travel products instead of travel destinations.
- Targets rising global demand for certified sustainable travel experiences.



The Good Travel Initiative

- Certified products may include:
 - Transportation
 - Lodging
 - Restaurants and drinking establishments
 - Activities and excursions
- These can be packaged into a trip offering low-impact transportation, sustainable dining, eco-friendly lodging, and nature-focused activities, promoting more responsible/sustainable tourism.
- Green Destinations is seeking partners in the U.S.



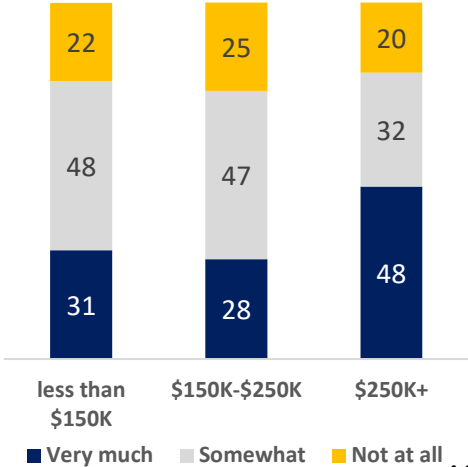
The Good Travel Initiative

- Helps destinations make existing travel products more sustainable and make more reliable claims toward their customers.
- Creates new sustainable travel opportunities by bringing new players and initiatives into the supply chain.
- Develops and links low-impact, low-carbon approaches, devices, software, vehicles, etc.
- Brings together suppliers, destinations, strategic partners, national tourism boards, online travel agencies and others.



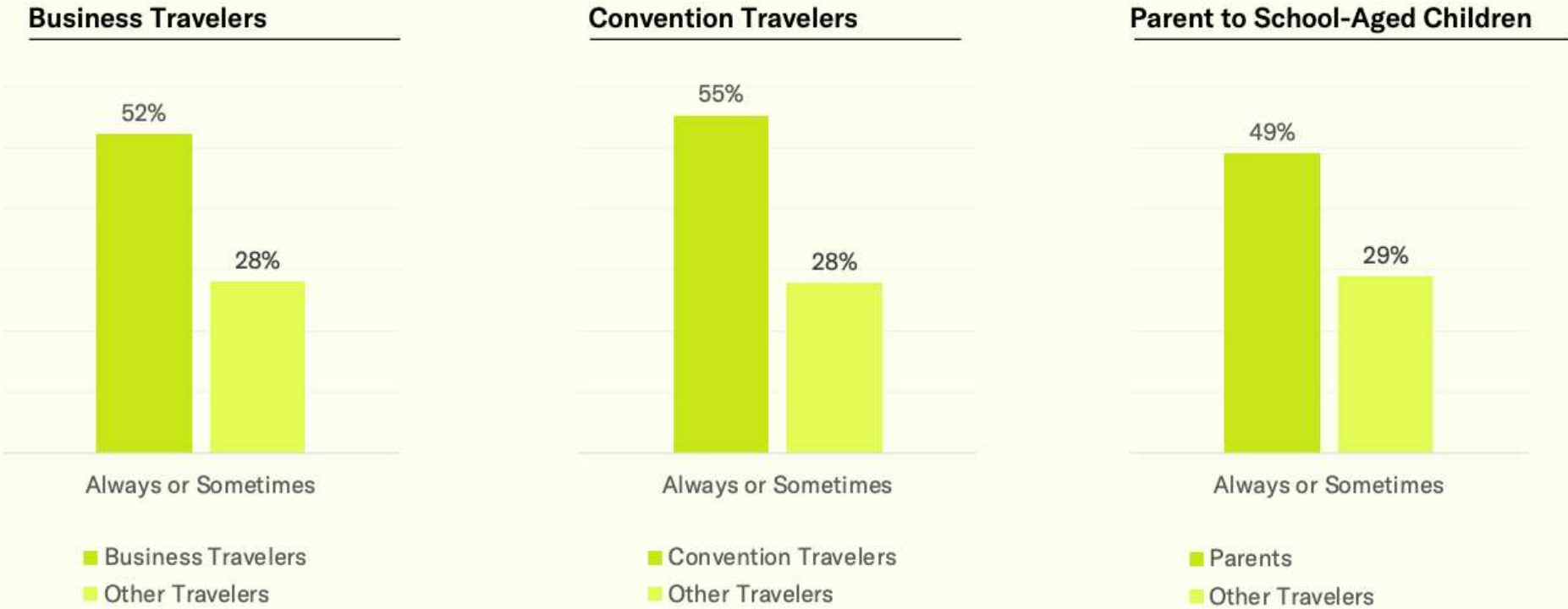


Importance of a Destination's
Commitment to Sustainability in
Choosing a Place to Visit



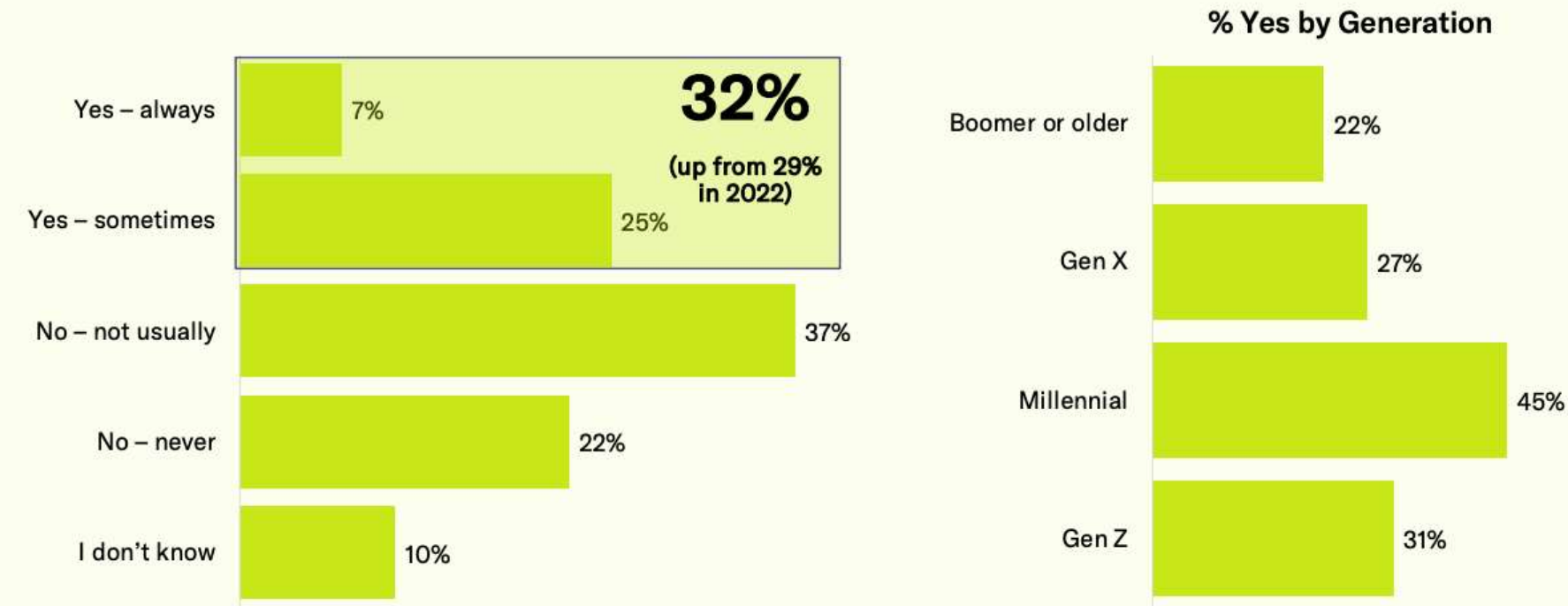
May 2022

Hotel Green Programs: Who is Willing to Pay More?

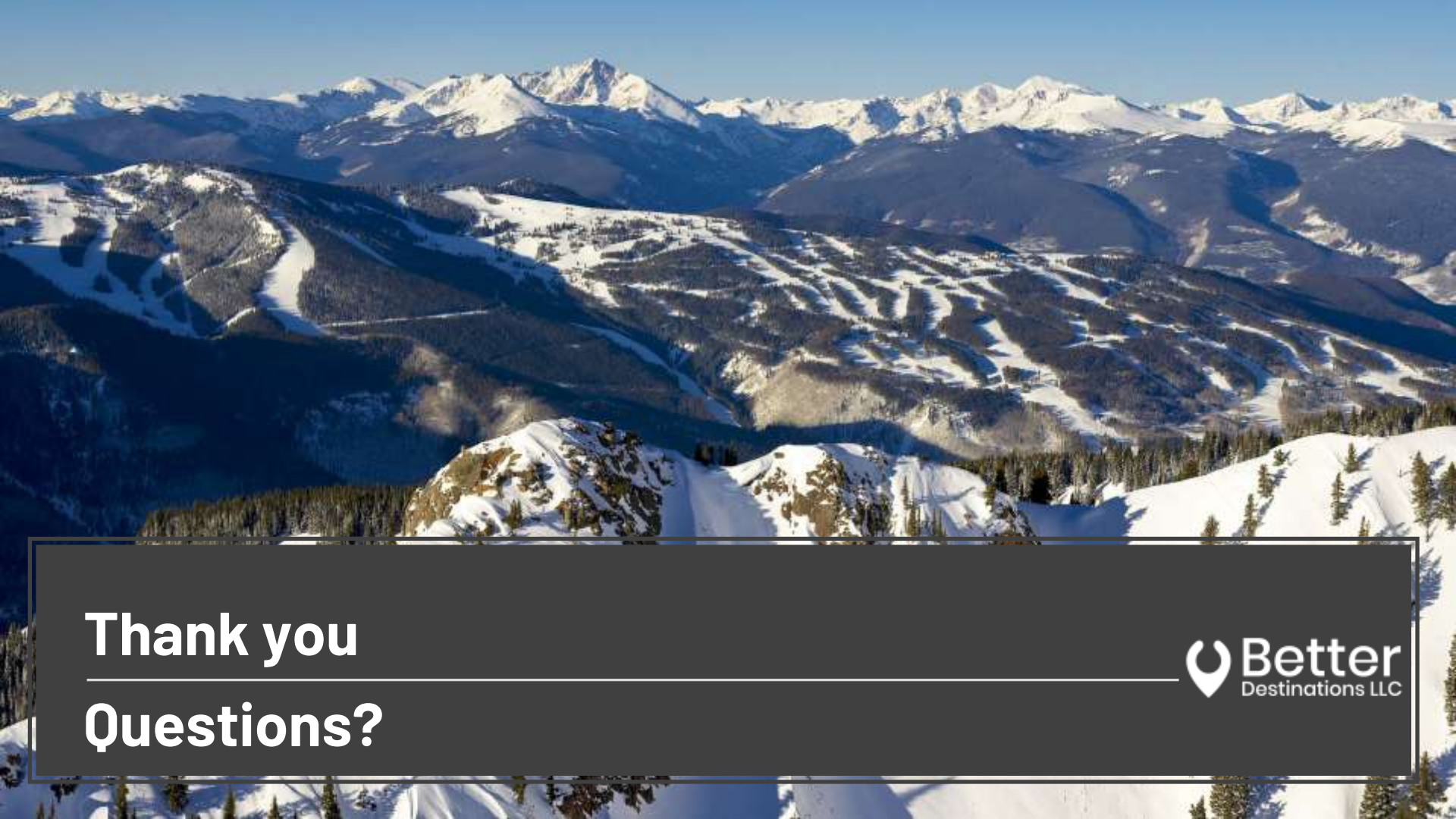


Question: How often would you pay slightly more (e.g., max. 10%) for staying at a hotel that has a strong "green" program/certification?

Americans are also Increasingly Prioritizing Stays in Hotels with Green Initiatives, Particularly Millennials



Question: When traveling, do you make it a priority to stay in hotels that have “green” programs and certifications?



Thank you

Questions?





Case Study: Visit Lake Tahoe

Presenter

Carol Chaplin, President & CEO Lake Tahoe Visitors Authority



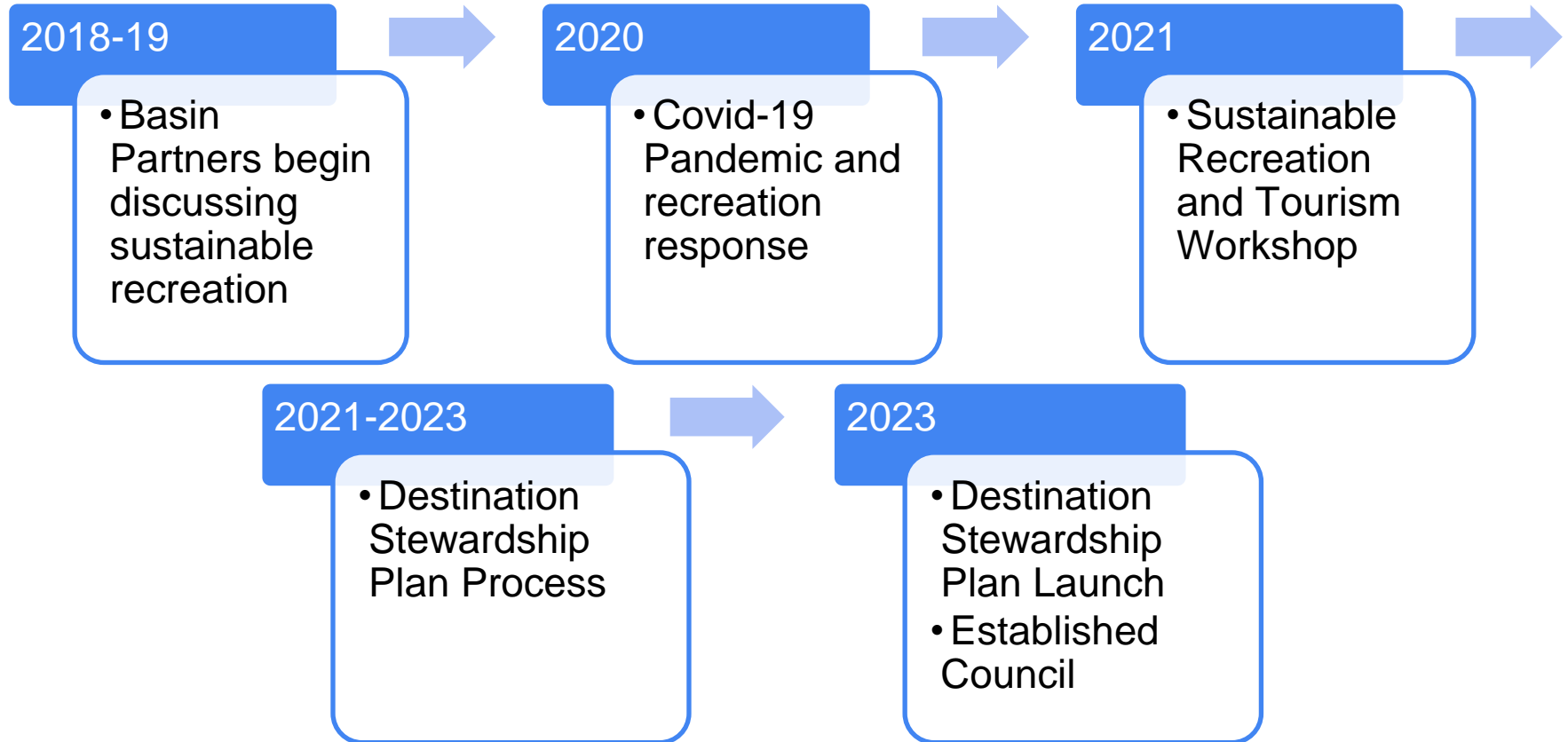
“The Lake Tahoe region experienced an influx of visitors seeking release from pandemic restrictions in outdoor spaces. At the same time, a national migration from cities to mountain and resort communities drove Tahoe property values and housing costs well beyond levels that most local salaries could afford. The force of this phenomenon turned housing and labor shortages into crises. **Traffic congestion, parking transgressions, environmental impacts and litter on beaches and trails,** in addition to long lines for restaurants and **disrespectful behaviors,** pushed local unhappiness to a tipping point.”

Lake Tahoe Stewardship Plan,
06.19.2023

We Have Issues



Moving Toward Destination Stewardship





TAHOE PROSPERITY CENTER



TAHOE CHAMBER

Additionally, nearly 200 stakeholders on monthly recreation calls including law enforcement, private businesses, and community groups.

**FOSTER A TOURISM
ECONOMY THAT
GIVES BACK**

**TURN A SHARED
VISION INTO A
SHARED ACTION**

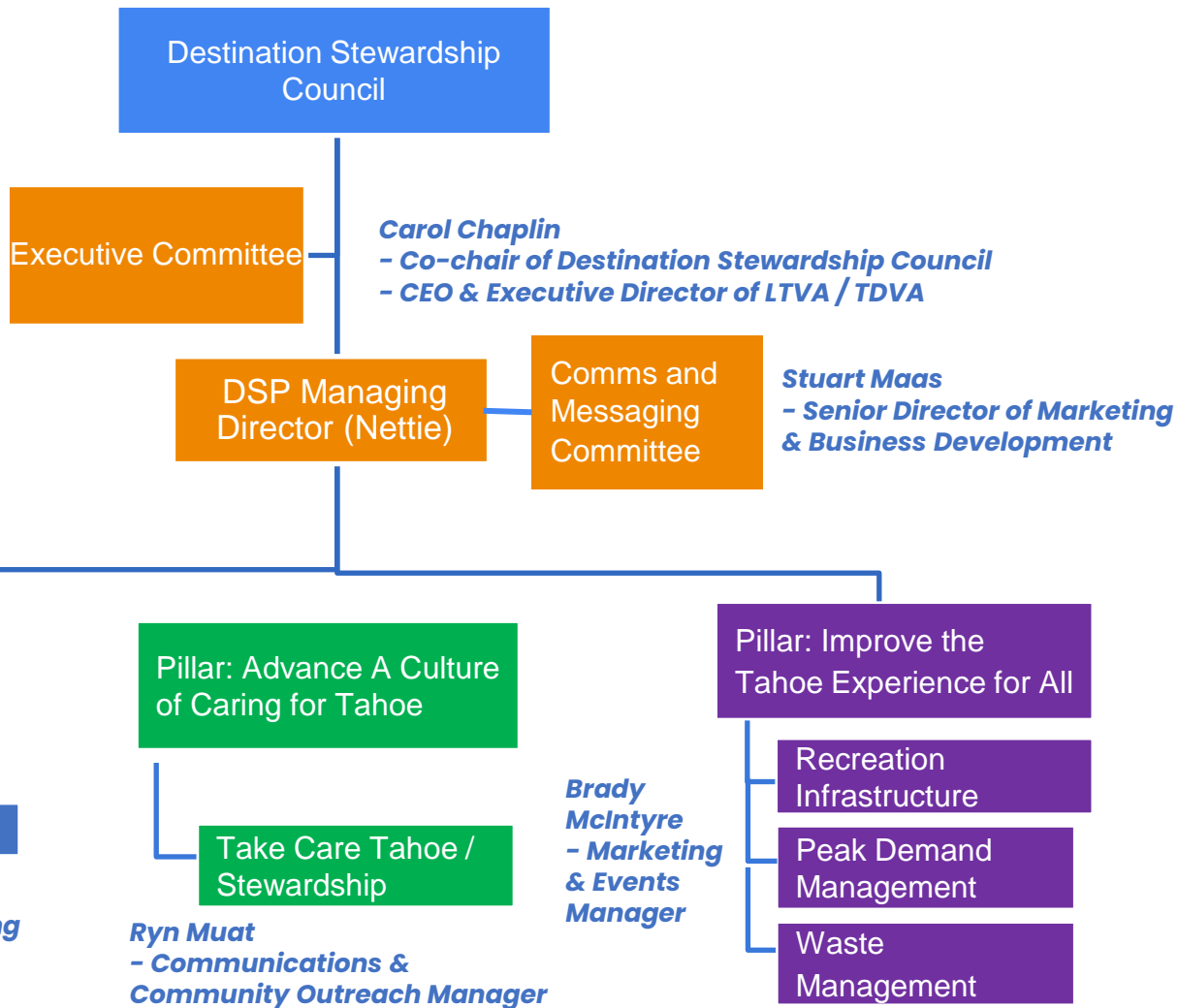
SHARED VISION

A cherished place,
welcoming to all, where
people, communities, and
nature benefit from a
thriving tourism and outdoor
recreation economy.

**IMPROVE THE
TAHOE EXPERIENCE
FOR ALL**

**ADVANCE A
CULTURE OF CARING
FOR TAHOE**

Structure and Proposed Action Teams



Action
Teams
(5)

LTVA Strategic Plan

- Align with the Destination Stewardship Plan
- Adaptable
- Resilient
- Incorporate involvement and support of the tourism industry and community
- Message must include enjoying Lake Tahoe but taking care
- Attract visitors whose values align with resident and destination values
- Traditional focus on volume may shift to consider visitor travel spending yield while monitoring resident perspectives and disruption.
- Recognizes potential impact of the Event Center including small tourism-related businesses.

Lake Tahoe Visitors Authority
**Organizational
Strategic Plan**
2023



Planning and Strategy for
a New Tourism Marketplace

Visit
lake tahoe

LTVA Vision

In 10 years, we will be considered to be in the top 10% of DMO's known for leading sustainable tourism while continuing to fulfill our mission to market the Lake Tahoe "South Shore" as a unique year-round Destination to the global marketplace to favorably impact the Lake Tahoe "South Shore" Destination economy through overnight stays and tourism spending.



LTVA Vision, Principles, and Mission

LTVA Vision

In 10 years, we will be considered to be in the top 10% of Destination Management Organizations known for leading sustainable tourism around the world, all while continuing to fulfill our organizational mission to market the Lake Tahoe "South Shore" Destination of Lake Tahoe as a unique year-round Destination to the global marketplace to favorably impact the Lake Tahoe "South Shore" Destination economy through overnight stays and tourism spending.

Guiding Principles

Lake First
Everything starts and ends with the lake. You brought us all here. It makes us truly special and different from other Destinations and brings people back together year after year. It fills our hearts and fuels our good times, community, and economy, so we always consider the lake and everything we do.

Tahoe Trail Blazers
Suppose we want to be in the top 10% of DMOs regarding sustainable tourism and be considered the rock of Lake Tahoe tourism. In that case, we must be innovative, inventive, creative, and courageous in our thinking and actions to lead the way.

In Balance
Whether it's on the lake, on the trail, or the slopes, or in our brand and the way we do business, balance everything we have to balance how we promote our unique Destination experiences, be it indoor, dash, outdoor, or days left right all while balancing our interests in our economy, environment, and community.

Be Communicative
Like our lake, we want to be crystal clear in our communication so everyone knows what our brand stands for, our vision, where we stand on issues, what visitors can expect, and how we recommend they experience Tahoe. As a brand representing many interests, clarity helps collaborate and provide unity.

Alpine Passion
We care deeply about this place but are also here for a good time. We love the lake, love to play, and love what we do. We're here to share this place with the world and show them its beauty and playful, fun-loving spirit.

lake tahoe

LTVA Scenarios

Scenario 1: The Growth Scenario

Grow the economy to attract more visitors, increasing visitor volume while keeping the mix of visitors unchanged.

Scenario # 2: The Higher Yield Scenario

Focus on driving higher revenues from visitors, potentially at the expense of fewer visitors. Targets visitors who yield higher returns for the economy

Scenario #3: The Values-Based Scenario

Attract visitors based on similar values to residents, potentially reducing conflicts between visitors and residents. Designed to create a tourism economy that aligns with the priorities and values of the community.

LTVA Scenarios

Scenario #4: The South Shore Scenario

Based on input, a fourth scenario was developed: “The South Shore Scenario,” which combines the three original scenarios and embraces an emphasis on managing tourism, balancing tourism with community needs and protecting the environment.

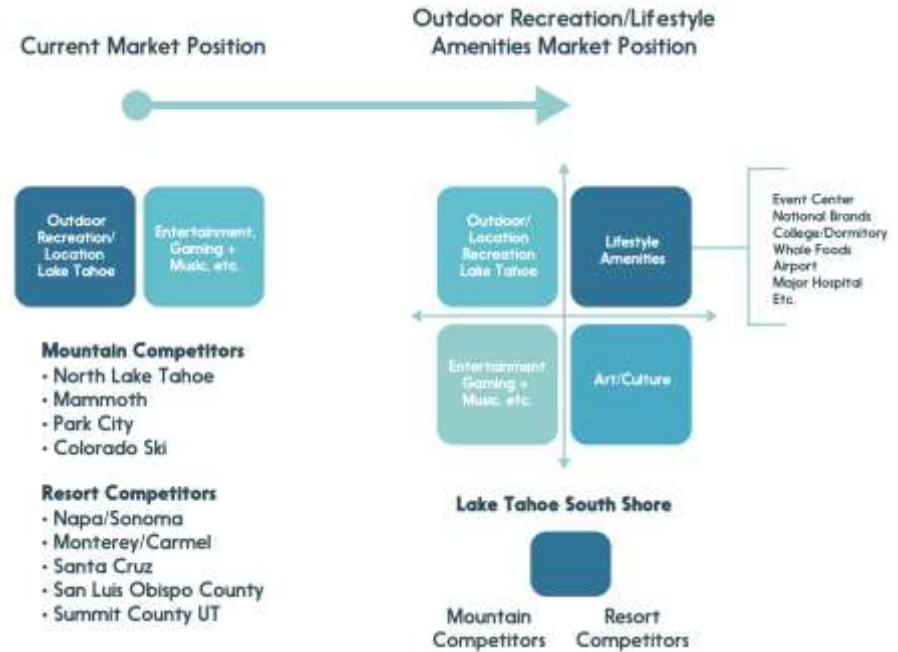
Below is a forecast for potential revenues and visitor days based on Scenario 4. The scenario forecast includes projections for revenue, visitor days (1 visitor for three days equals three visitor Days) and Yield Per Visitor and can guide efforts to implement this scenario.

The South Shore Scenario Forecast

Scenario 4	2018	2019	2020	2021	2022	2023	2024	2025	Chg (2022 to 2025)	Annual Forecast
Revenue	\$2,739,000,000	\$2,702,000,000	\$1,762,000,000	\$2,300,000,000	\$2,558,000,000	\$2,680,000,000	\$2,802,000,000	\$2,985,000,000	\$427,000,000	5.6%
Visitor Days	12,657,000	12,814,000	8,787,000	10,739,000	10,851,000	10,919,000	10,968,000	11,137,000	286,000	0.9%
Yield	\$216	\$211	\$201	\$214	\$236	\$245	\$255	\$268	\$32	3.4%

The Strategy in Action

- Increase the value of tourism while benefiting the local communities and environment
- Promote the south shore as a unique travel destination: indoor/outdoor recreation and a combination of lifestyle amenities not expected and unavailable to the competitive set.
- Support a culture of innovation and creativity
- Develop partnerships and alignments



Examples of the Vision and Strategy in Action:

Rules to Lake By™

Protect the Awe
Be Kind By Nature
Let's Leave Less
Park with Heart
Enjoy Tahoe Time





Protect the Awe

Let's look out for the Lake.

Lake Tahoe is mother nature showing off at her best—it's awe and then some. To keep it that way, let's look out for the lake, the mountains, the trails and the trees, the critters and all the people here, too. Let's go big, but let's land lightly—because spots like this are hard to come by.



Be Kind By Nature

Live with kindness each day, in every way.

Make kindness your compass. Whether you're here for a weekend or a lifetime, we're all here for the same reasons. Care for those around you, treat everyone with respect and show some love in the South Shore.



Let's Leave Less

Let's pick up after ourselves and our pets.

In leaving less, we lighten our impact on the lake. So let's pick up our trash, let's clean up after our pets and let's look out for what our neighbors may have left behind, too. When we leave less, we leave more for future generations to enjoy.



Park with Heart

Park properly and share the space.

To park with heart is to park where we're supposed to park, rather than where we wish we could. It's about sharing our spaces so we can all make the most of them. If that means walking a bit further, there are worse places to take a hike.



Enjoy Tahoe Time

Practicing patience enriches everyone's experience.

It's one thing to be out for a rush, but another to be in one. So, when you're here, be on Tahoe Time. That means savor, don't sprint. Go get after it on our slopes, shores and summits—but practice patience everywhere else.

Lake Tahoe Visitors Authority as a Leader

- Lake Link Funding
- Take Care Billboards and Committee
- “Rules To Lake By” Consumer Messaging
- Ambassador and Park Ranger Programs
- Blue Crew Member
- City of SLT Water Bottle Ban
- Tourism Cares Destination Partnership
- Meaningful Travel Map



Tahoe Blue Event Center

- First Full Operating Year with off-peak & diverse events
- 7 Confirmed Conferences September – November
- Strong Repeat Business
- Tahoe Knight Monsters playing October 2024
- Potential for Major College Sporting Event
- Additional Youth Sports Events
- Projecting Strong Concert Line-Up
- Hitting Our Event Days Capacity
- FY24 (Opening September 1, 2023 – June 30, 2024):
 - 78 Events
 - 129 Event Days
 - \$351,176 projected in Public Transportation Revenue
- Annual Economic Impact \$60m.
- Assisting with \$5 Billion in South Shore Reinvestment





Awe and then Some®

Thank You!

