



Reno Tahoe

2023 Visitor Profile

Research Overview, Objectives, and Methodology	3
Executive Summary	6
Profiles of Key Visitor Segments	10
Visitor Demographics	20
Origin Markets	34
Trip Details	37
Activities	50
Visitor Spending	54
Visitor Experience	59
Visitor Perceptions of Reno Tahoe	75
Travel Planning	79

Research Overview, Objectives, and Methodology

Research Overview & Objectives

This report presents the findings of a study of visitors to Reno Tahoe in 2023. This research was conducted by Future Partners on behalf of Visit Reno Tahoe in support of the organization's objectives to track and understand visitor behavior in the region, ultimately furthering the positive impact of tourism to the Reno Tahoe community.



Methodology

This survey-based research was designed to generate insights into Reno Tahoe visitors, including:

- Detailed trip characteristics, including reasons for visiting Reno Tahoe, length of stay, and lodging type
- Activities & attractions visited in Reno Tahoe
- Evaluation of Reno Tahoe's destination attributes
- Detailed Reno Tahoe visitor spending estimates
- Trip planning windows
- Visitor satisfaction
- Visitor demographics

Working with Visit Reno Tahoe, an online survey was developed by Future Partners and sent to a nationally representative of traveling adults ages 21 and older. Respondents were screened for recent visitation to the Reno Tahoe region. The final sample includes 548 completed surveys from Reno Tahoe visitors in 2023. The data was collected on an ongoing basis between January 2023 and January 2024.

Comparisons to a previous study in 2022 are noted where relevant.



Executive Summary

Executive Summary: 2023 Reno Tahoe Visitor Profile

Married, Employed, College-Educated, Millennial, Diverse

The majority of Reno Tahoe visitors are married, employed, and college-educated. The average household income among visitors is \$97,039. Millennial age visitors comprise the largest share of visitors (34%). BIPOC-identifying represent 27% of visitors, while nearly one-in-ten visitors identifies as LGBTQ+.

Over Half of Visitors are from California

52% of visitors are from California. Other top visitor markets by state are within the West, including Nevada, Texas, Arizona, Utah and Oregon. Las Vegas, the San Francisco Bay Area and Sacramento are the top origin markets by metro area.

A Vacation Destination

70% of visitors to Reno Tahoe say their primary trip purpose is vacation/leisure, and business and convention visitors (7%) often extend for leisure. Another 14% primarily come to visit friends and/or relatives. Special events and festivals specifically drive 4% of visitors.

Over One-Third of Travel Parties Have Children

The average travel party size to Reno Tahoe is 2.8 people. Over 70% of visitors are traveling with their significant other, one-third with their own children under age 18. 16% of Reno Tahoe visitors have their pet accompany them on their trip.

Overnight Visitors Stay More than 3 Nights on Average

Visitors who stay in vacation rentals have the longest average lengths of stay in Reno Tahoe at 4.3 nights. Casino hotel guests stay 3.5 nights on average and non-gaming hotel guests stay slightly longer at 3.8 average nights. VFR visitors typically stay 3.4 nights. Reno Tahoe visitors begin planning their trips 1.2 months out on average.

Casino Hotels are the Most Popular Accommodations

55% of Reno Tahoe visitors stay in gaming/casino hotels and another 20% stay in non-gaming hotels. 15% of visitors are hosted in the private residences of local family or friends. Vacation rentals (6%) and bed & breakfasts (11%) are more popular with younger visitors, particularly Millennial-age, who are more than twice as likely to use these lodging options while in the area.

Executive Summary: 2023 Reno Tahoe Visitor Profile

A Majority of Arrivals are by Personal Vehicle

Two-thirds of Reno Tahoe visitors report they arrived in the destination in their personal vehicle. One-quarter came via air. The remainder arrived in the area via other methods including rental car (6%) and RV (1%).Visitors largely leave Reno Tahoe by the method they arrive.

Downtown, Incline Village, Sand Harbor are Top Areas of Exploration

Midtown District and Riverwalk District also draw more than a quarter of visitors, with the former even more popular with casino hotel guests and VFRs. Vacation rental visitors are the most diverse in the areas of Reno they visit on their trips.

Gaming, Lake Tahoe, & Shopping are the Most Common Activities

Nightlife and hiking are also popular visitor activities. Important shares of visitors also view public art, visit microbreweries and go to spas. In terms of the activities that most motivate visitation, gaming and Lake Tahoe are key.

The Average Visitor Spends \$223 Per Day In-Market

The greatest visitor expenditures are on restaurants and lodging, followed by gambling and shopping. Driven by restaurant spending, Mindful Moms and Ambitious Adventurers have the highest daily trip party spending; vacation rental visitors spend the most on lodging.

Nearly 80% are Highly Satisfied with their Overall Trip Experience

Visitors are largely satisfied with the quality of accommodations (72%), hospitality and service (72%) and activities (71%). Visitors are less satisfied with the value they received for the money (61%) and their interactions with locals (63%). Nearly half report experiencing an in-destination issue on their trip, mainly traffic and panhandling.

A Majority Say they are Likely to Return & Recommend

While business and event visitors are less sure of their return to the area, 79% of leisure visitors and 85% of VFRs say they are likely to come back to Reno Tahoe. In addition, 71% of visitors said they are likely to recommend the Reno Tahoe region to friends and/or family.

Executive Summary: 2023 Reno Tahoe Visitor Profile

Visitors most agree that Reno Tahoe has a vibrant and fun atmosphere; least agree it is a fusion of sophistication and edginess

Five statements on the Reno Tahoe brand were presented to visitors, who rated their agreement with them on a five-point scale. Nearly three quarters of visitors agreed or strongly agreed that Reno Tahoe has a vibrant and fun atmosphere, while about two-thirds agreed it is a place where you can live life to the fullest and has a spirit of independence. Over half agree Reno Tahoe celebrates individuality and the unconventional. However, just 46% agree it is a fusion of sophistication and edginess.

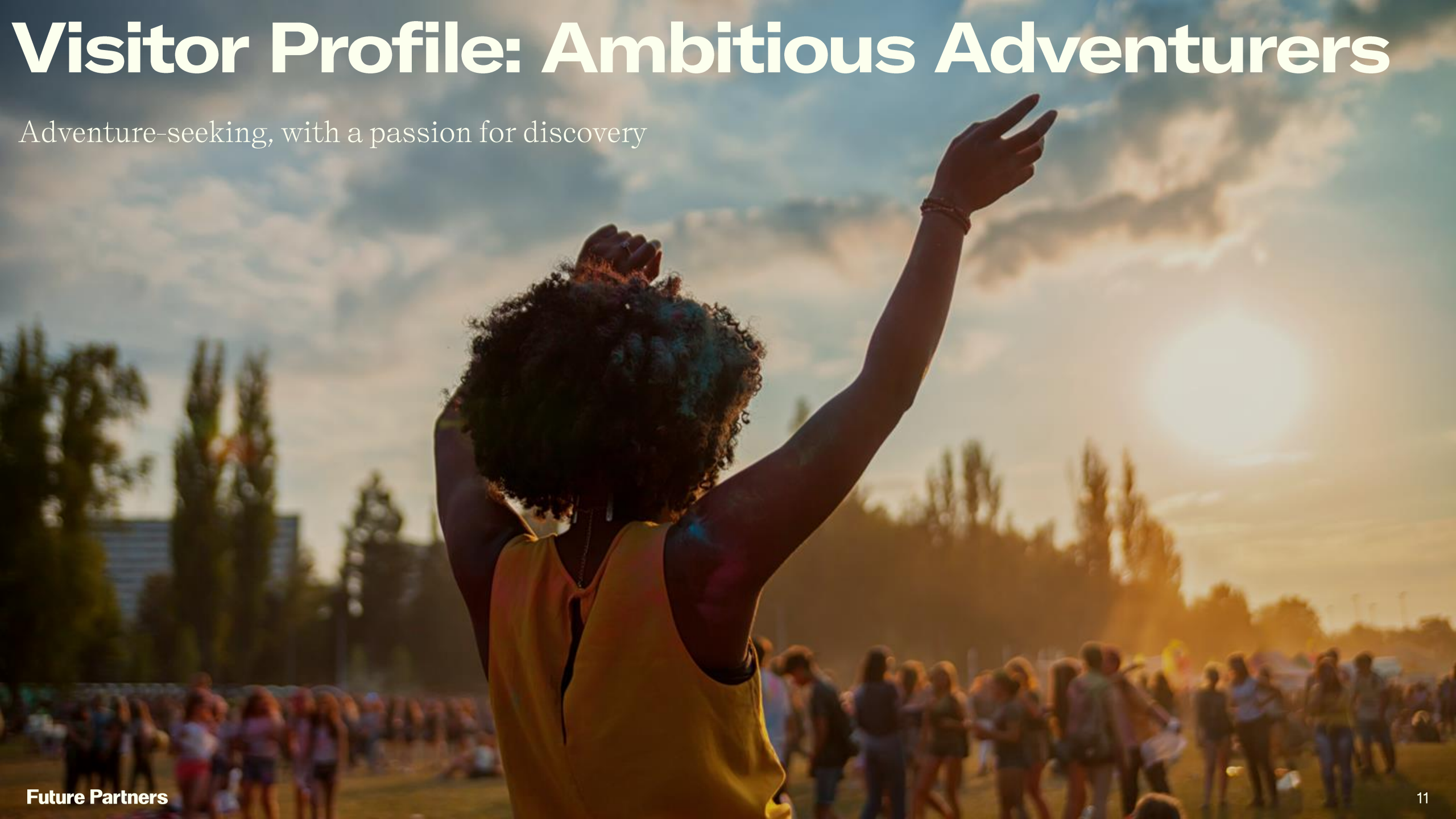
Reno Tahoe is rated highest by its visitors for its gaming, outdoor recreation, family-friendly activities, winter sports, and water activities

Survey respondents were asked how much they agreed Reno Tahoe delivered on certain destination attributes. The chart at right shows the percent of Reno Tahoe visitors who agree Reno Tahoe The majority of visitors rate the destination highly for nearly all attributes tested. Note however that variety of museums and art galleries, performing arts, professional sporting events, golf and retail shopping all under perform other attributes. In addition, despite shopping, spas and microbreweries being among the most common trip activities, these destination attributes are not amongst the most highly rated by visitors.

Profiles of Key Visitor Segments

Visitor Profile: Ambitious Adventurers

Adventure-seeking, with a passion for discovery



Ambitious Adventurers in Reno Tahoe



**Top Rated
Reno Tahoe
Attributes:**

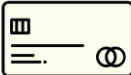
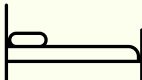
- 1. Gaming**
- 2. Family
Activities**
- 3. Good Value
for \$**

**Satisfied
with Overall
Trip:
95%**

**Likely to
Return:
87%**

**Likely to
Recommend:
92%**

Ambitious Adventurers in Reno Tahoe

<div>Travel Party</div> <div></div> <div>3.0</div>	<div>Nights in Market</div> <div></div> <div>4.0</div>	<div>Visitor Spend Per Person</div> <div></div> <div>\$1,430</div>	<div>Top Lodging</div> <div></div> <div>Casino Hotel (60%) Other Hotel (23%)</div>
<div>Planning Window</div> <div></div> <div>1.4 months</div>	<div>Top Areas Visited</div> <div></div> <div>Downtown (75%) Riverwalk (61%) Incline Village (59%)</div>	<div>Top Activities</div> <div></div> <div>Lake Tahoe (64%) Shopping (59%) Gambling (58%) Nightclub (57%) Hiking (37%) Spa (31%)</div>	<div>Method of Arrival</div> <div></div> <div>Airplane (51%)</div>

Visitor Profile: Cultured Creatives

Curious and culture-seeking



Cultured Creatives in Reno Tahoe



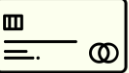
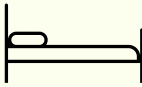




**Top Rated
Reno Tahoe
Attributes:**
1. Outdoor Rec
2. Family
Activities
3. Gaming

**Satisfied
with Overall
Trip:
88%**

**Likely to
Return:
82%**

**Likely to
Recommend:
82%**

Cultured Creatives in Reno Tahoe

<div>Travel Party</div> <div></div> <div>2.9</div>	<div>Nights in Market</div> <div></div> <div>3.2</div>	<div>Visitor Spend Per Person</div> <div></div> <div>\$936</div>	<div>Top Lodging</div> <div></div> <div>Casino Hotel (66%) Other Hotel (16%)</div>
<div>Planning Window</div> <div></div> <div>1.2 months</div>	<div>Top Areas Visited</div> <div></div> <div>Downtown (68%) Incline Village (56%) Sand Harbor (46%)</div>	<div>Top Activities</div> <div></div> <div>Lake Tahoe (58%) Shopping (55%) Gambling (50%) Nightclub (43%) Hiking (37%) Public Art (30%)</div>	<div>Method of Arrival</div> <div></div> <div>Own Car (55%)</div>

Visitor Profile: Mindful Moms

Quality time, family memories, wellness



Mindful Moms in Reno Tahoe

**Top Rated
Reno Tahoe
Attributes:**
1. Family
Activities
2. Gaming
3. Outdoor Rec

**Satisfied
with Overall
Trip:
86%**

**Likely to
Return:
83%**

**Likely to
Recommend:
83%**

Mindful Moms in Reno Tahoe

Travel Party 

3.7

Nights in Market 

3.3

Visitor Spend Per Person 

\$798

Top Lodging 

Casino Hotel (57%)
B&B (20%)

Planning Window 

1.2 months

Top Areas Visited 

Downtown (69%)
Riverwalk (48%)
Incline Village (45%)

Top Activities 

Shopping (52%)
Gambling (46%)
Lake Tahoe (42%)
Nightclub (40%)
Public Art (26%)
Spa (24%)

Method of Arrival 

Own Car (50%)

Visitor Demographics

This section presents a demographic profile of visitors to Reno Tahoe during 2023.

Differences between relevant marketable segments are noted in the tables on the right of the page.



Reno Tahoe Visitors 2023: Demographic Summary

A photograph of a man and a young child in winter clothing standing in a snowy environment. The man is wearing a dark blue knit beanie, glasses, and a brown puffer jacket. The child is wearing a pink knit beanie and a light-colored puffer jacket. They are both looking towards the right. Overlaid on the right side of the image are four circular callouts with white dashed lines connecting them. The callouts contain demographic statistics for Reno Tahoe visitors in 2023.

**45 years
old on
average**

**\$97,039
household
income**

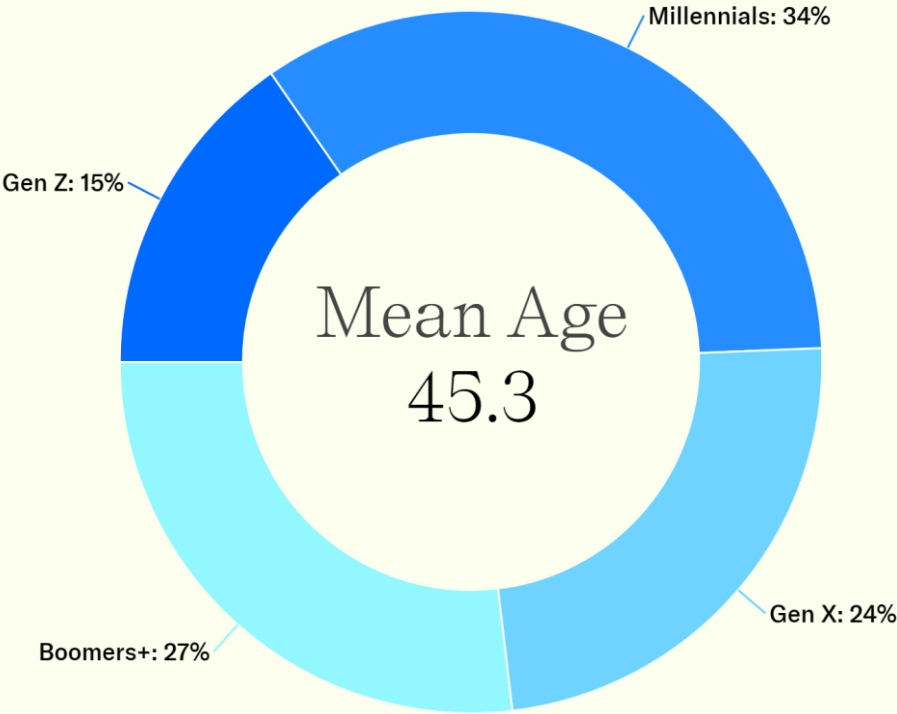
**40%
children in
household**

**27%
BIPOC**

Millennials are the most represented generation amongst Reno Tahoe visitors at 34%

Millennial age visitors comprised the largest share of Reno Tahoe visitors in 2023 (34%), followed by Boomers (27%), Gen X (24%) then Gen Z (15%). In fact, 57% of vacation rental visitors and 51% of non-gaming hotel visitors are Millennial age. The mean age across all visitors is 45.3 years.

Age & Generation



Detail by Lodging Type

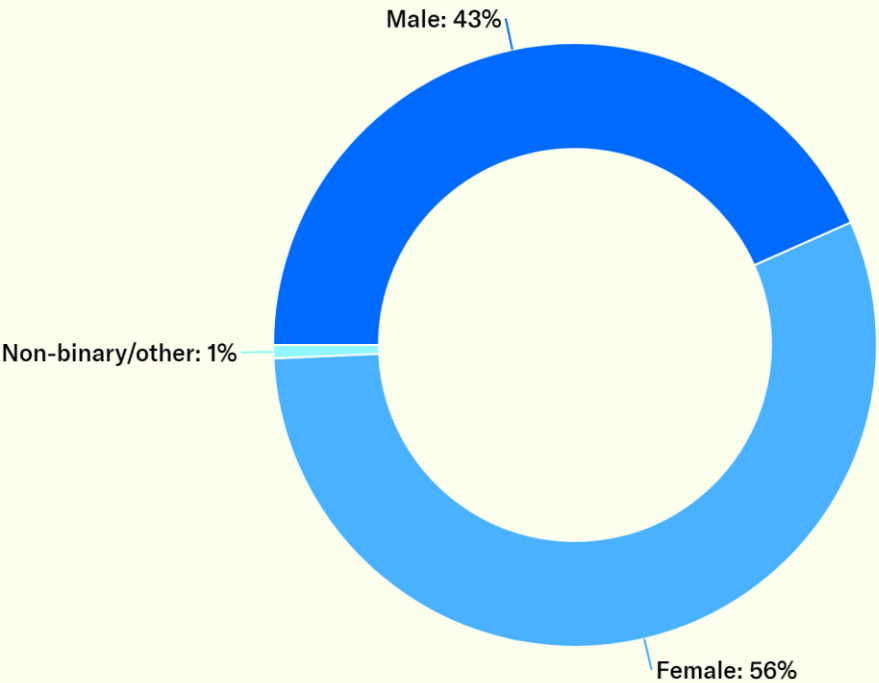
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Gen Z	15%	15%	8%	17%	27%
Millennials	34%	32%	51%	57%	24%
Gen X	24%	30%	15%	17%	24%
Boomers+	27%	23%	26%	10%	25%
Mean	45.3	45.0	45.0	38.9	43.9
Base	548	247	174	135	59

Question: How old are you?
Base: Total visitors. 548 completed surveys.

While Reno Tahoe casino/hotel visitors have an average gender split, vacation rental visitors skew male and VFR skew female

While visitors who stayed in casino resorts or other hotels had average gender splits, those who stayed in vacation rentals skewed male (56%) and VFR visitors skewed female (71%).

Gender



Detail by Lodging Type

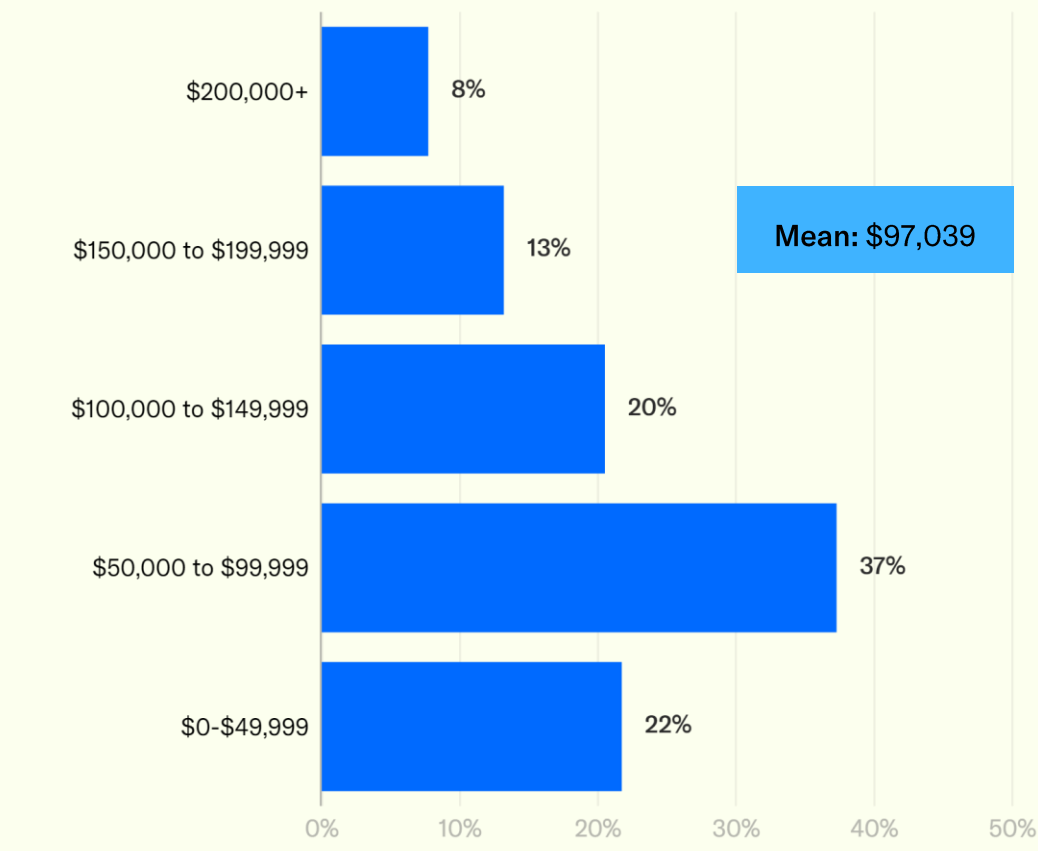
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Male	43%	45%	45%	56%	29%
Female	56%	53%	55%	44%	71%
Non-binary/other	1%	1%	0%	0%	0%
Base	547	246	174	135	59

Question: Are you...? Select one.
Base: Total visitors. 547 completed surveys.

Reno Tahoe visitors have average annual household incomes of \$97,039, with non-gaming hotel and vacation rental visitors skewing higher

Reno Tahoe visitors who stayed in non-gaming hotels and/or vacation rentals during their trips report average annual household incomes much higher than the overall average amongst visitors at \$112,783 and \$116,372, respectively.

Annual Household Income



Detail by Lodging Type

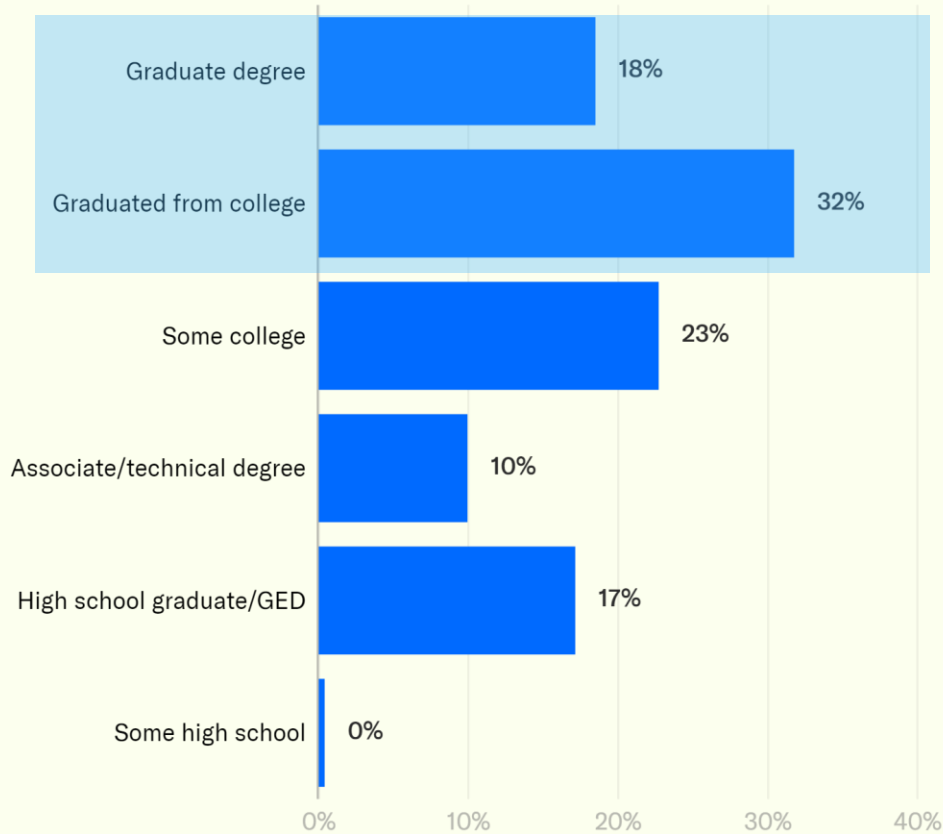
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
\$200,000+	8%	7%	10%	7%	6%
\$150,000 to \$199,999	13%	15%	21%	15%	11%
\$100,000 to \$149,999	20%	22%	23%	41%	14%
\$50,000 to \$99,999	37%	35%	33%	31%	26%
\$0-\$49,999	22%	21%	14%	6%	43%
Mean	\$97,039	\$98,942	\$112,783	\$116,372	\$78,921
Base	540	243	173	134	59

Question: What is your combined household income in U.S. dollars? Select one.
Base: Total visitors. 540 completed surveys.

Half of Reno Tahoe visitors have college degrees

Commensurate with household income levels, those staying in hotels and vacation rentals have the greatest levels of formal education.

Highest Education Level



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Graduate degree	18%	16%	26%	28%	10%
Graduated from college	32%	37%	41%	41%	19%
Some college	23%	17%	18%	13%	32%
Associate/technical degree	10%	10%	2%	7%	9%
High school graduate/GED	17%	19%	13%	11%	29%
Some high school	0%	1%	0%	0%	0%
Base	548	247	174	135	59

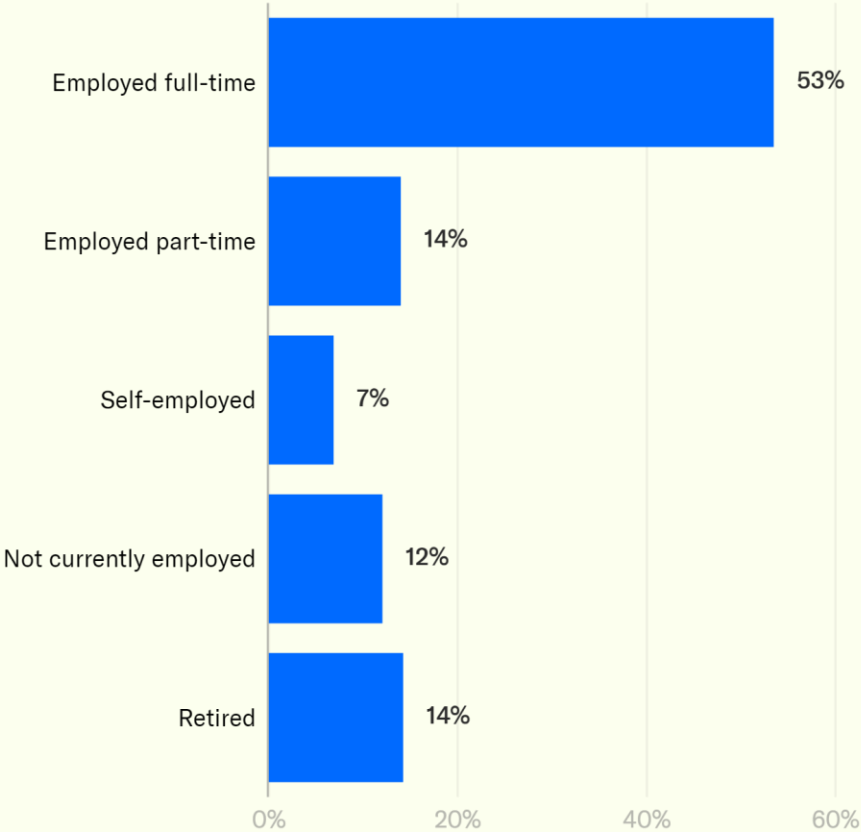
Question: What is your highest education level? Select one.

Base: Total visitors. 548 completed surveys.

A majority of Reno Tahoe visitors are employed full-time

Over 60% of Reno Tahoe visitors who stay in casino resorts, other non-gaming hotels and/or vacation rentals are employed full-time. VFR visitors are likelier than other visitors to be retired or not currently employed.

Employment



Detail by Lodging Type

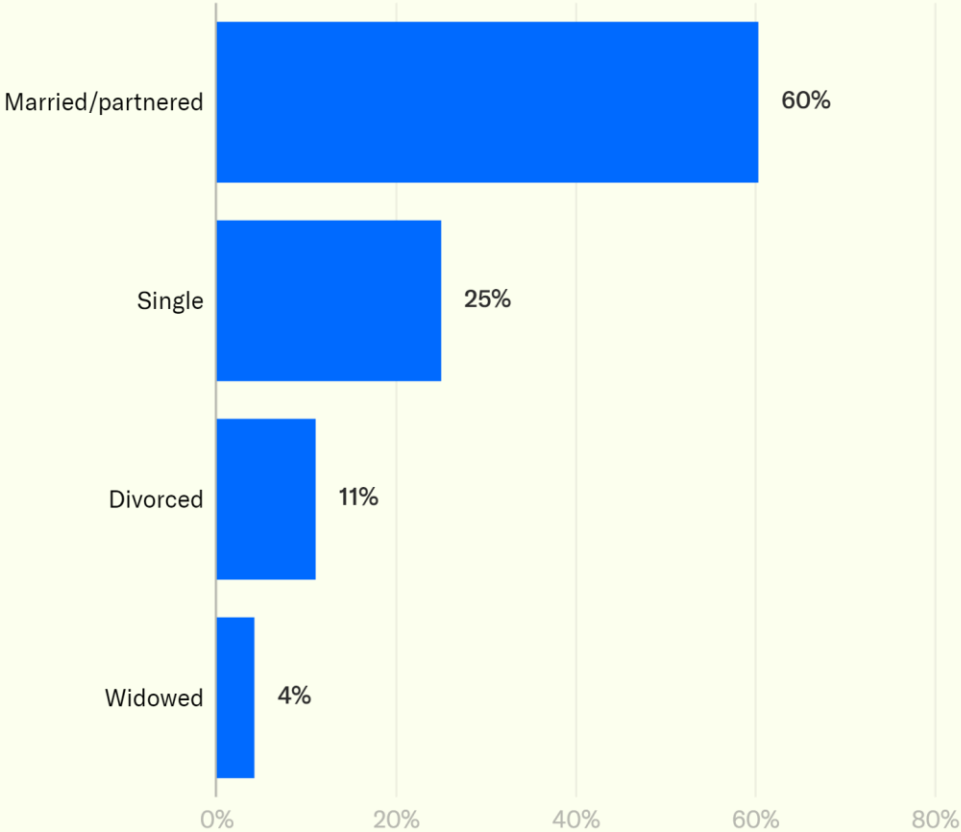
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Employed full-time	53%	62%	64%	71%	42%
Employed part-time	14%	7%	14%	3%	12%
Self-employed	7%	8%	6%	14%	9%
Not currently employed	12%	9%	6%	4%	15%
Retired	14%	14%	10%	7%	22%
Base	542	243	173	134	59

Question: What is your employment status? Select one.
Base: Total visitors. 542 completed surveys.

60% of Reno Tahoe visitors are married or partnered

Visitors who are not currently married or partnered are likelier to stay in casino hotels and/or with friends/relatives during their Reno Tahoe trips.

Marital Status



Detail by Lodging Type

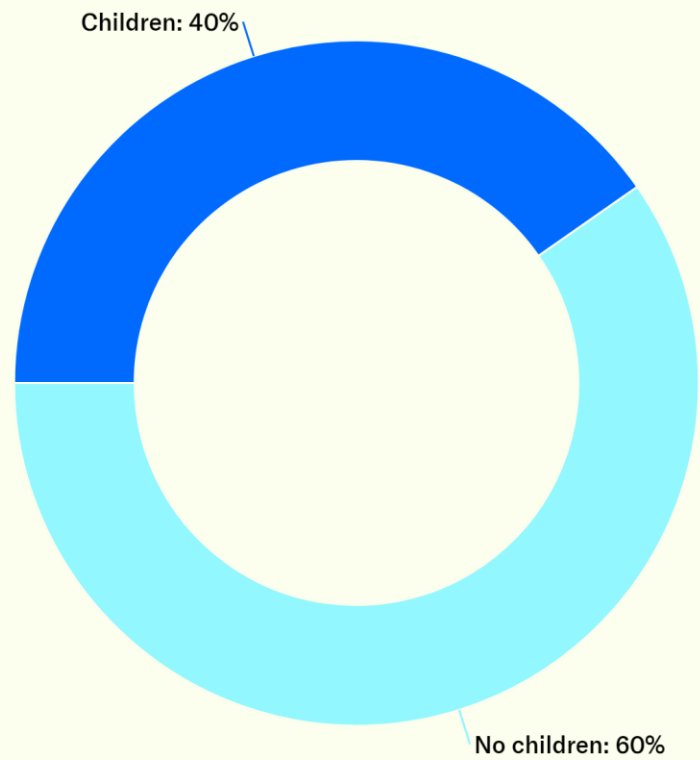
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Married/partnered	60%	65%	73%	70%	50%
Single	25%	25%	22%	25%	32%
Divorced	11%	5%	5%	2%	12%
Widowed	4%	5%	0%	2%	6%
Base	548	247	174	135	59

Question: What is your current marital status? Select one.
Base: Total visitors. 548 completed surveys.

40% of visitors have children in their household

While less than half of visitors who stay in casino properties, hotels and with friends/relatives have children under age 18, fully two-thirds of Reno Tahoe visitors who stayed in vacation rentals on their trips have children in their household.

Children in Household



Detail by Lodging Type

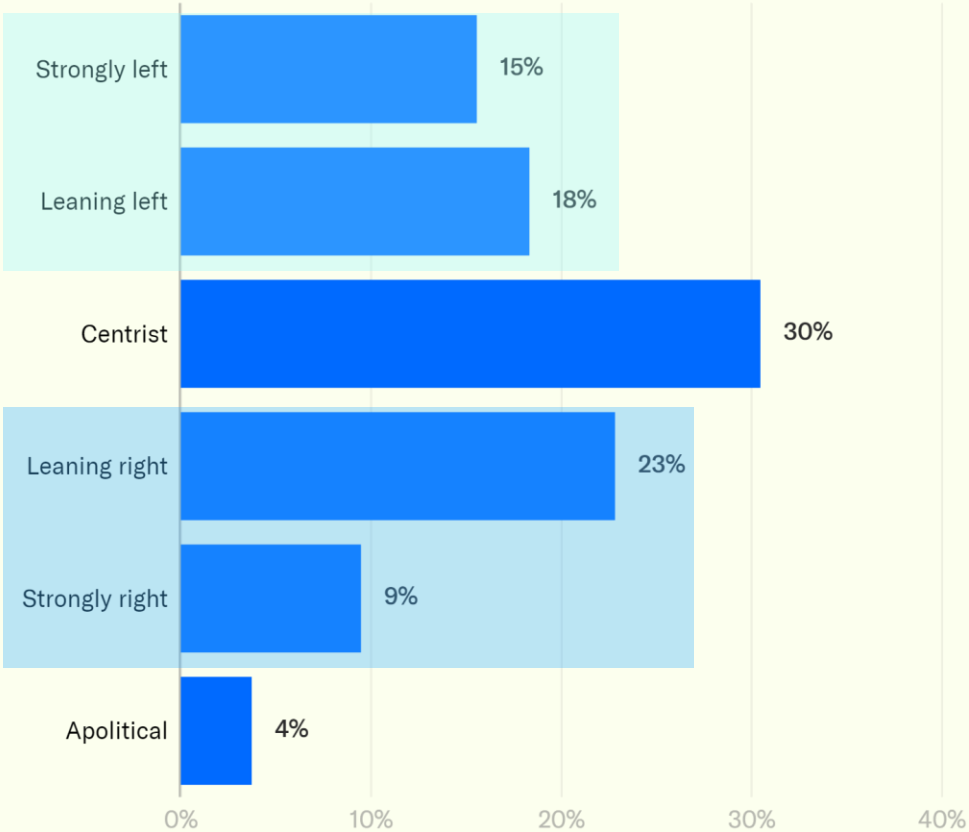
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Children under 18	40%	47%	49%	66%	28%
No children under 18	60%	53%	51%	34%	72%
Base	548	247	174	135	59

Question: Do you have children under 18 living in your household? Select one.
Base: Total visitors. 548 completed surveys.

There is a balance of political perspectives among Reno Tahoe visitors

One in three identify as strongly or leaning left, only a percentage point below identify on the right side of the spectrum, and 3 in 10 identify as centrist, the most common choice.

Political Perspective



Detail by Generation

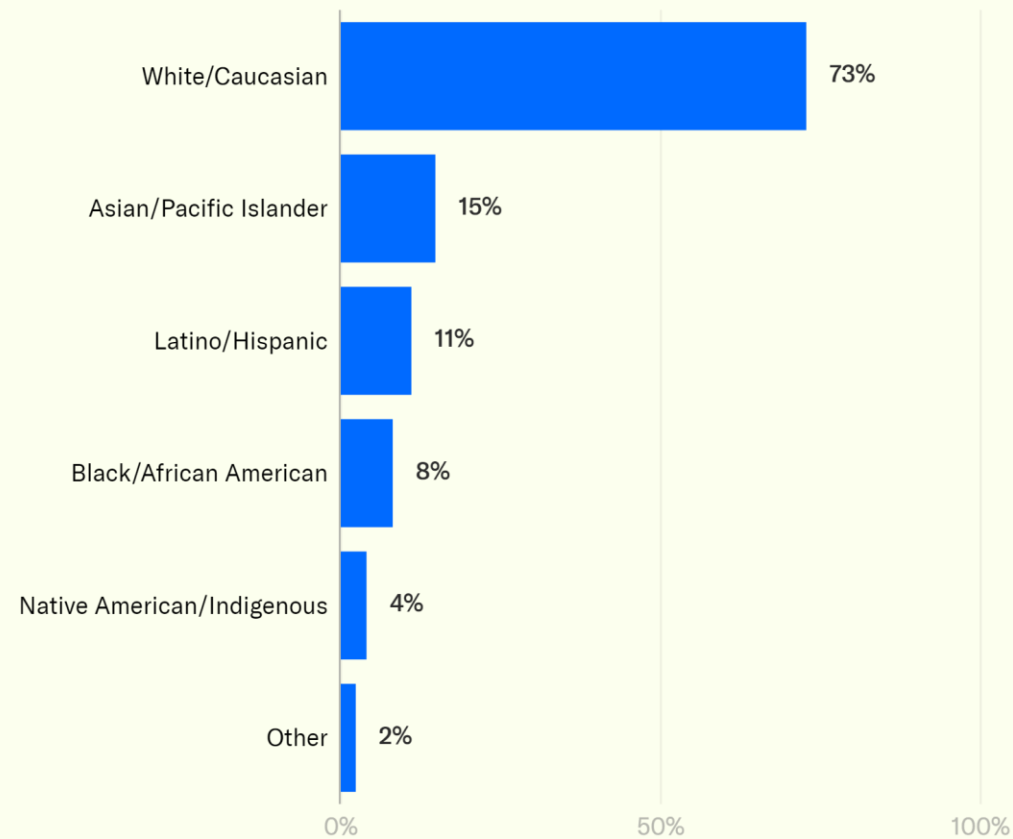
	Total	Gen Z	Millennials	Gen X	Boomers+
Strongly left	15%	17%	16%	12%	16%
Leaning left	18%	14%	16%	22%	20%
Centrist	30%	46%	30%	23%	29%
Leaning right	23%	16%	22%	21%	29%
Strongly right	9%	5%	10%	16%	5%
Apolitical	4%	2%	5%	6%	1%
Base	492	47	249	106	90

Question: Which best describes your political perspective?
Base: Total visitors. 492 completed surveys.

BIPOC-identifying represent 27% of Reno Tahoe visitors

There is the most racial diversity among those staying in casino hotels, with 15% of these visitors identifying as Latino/Hispanic, 12% as Asian/Pacific-Islander and 9% Black/African-American.

Ethnicity



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
White/Caucasian	73%	67%	81%	81%	78%
Asian/Pacific Islander	15%	12%	8%	13%	6%
Latino/Hispanic	11%	15%	5%	8%	12%
Black/African American	8%	9%	9%	4%	11%
Native American/Indigenous	4%	2%	0%	1%	0%
Other	2%	4%	0%	1%	3%
Base	548	247	174	135	59

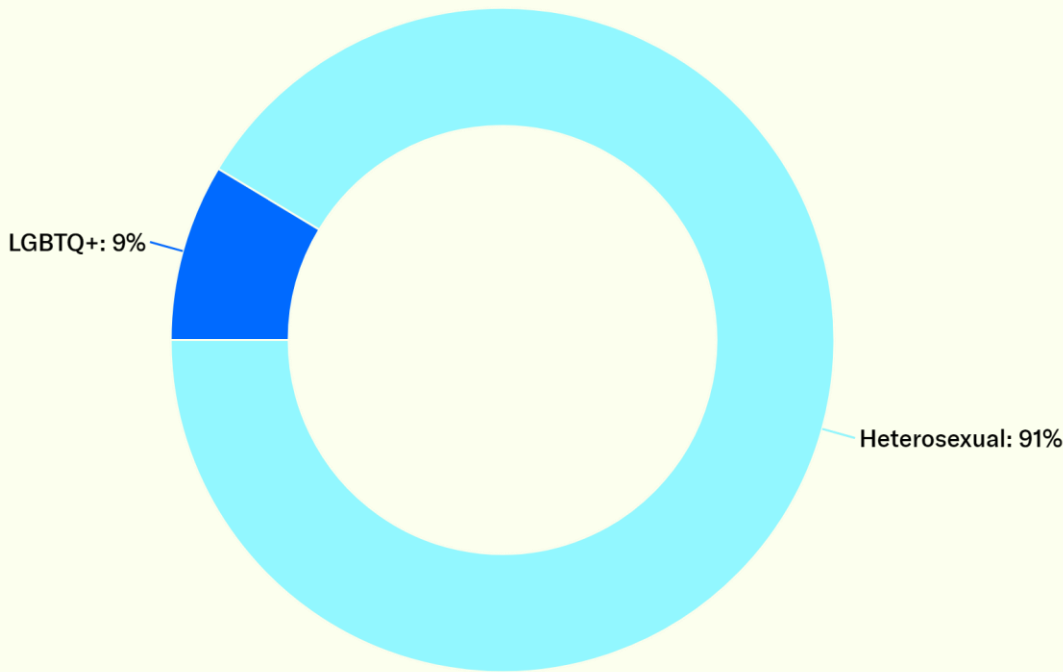
Question: What is your racial/ethnic background? Select all that apply.

Base: Total visitors. 548 completed surveys.

Nearly one-in-ten visitors identifies as LGBTQ+

Reno Tahoe visitors that identify as LGBTQ+ are likeliest to stay in non-gaming hotels and vacation rentals on their trips.

Orientation



Detail by Lodging Type

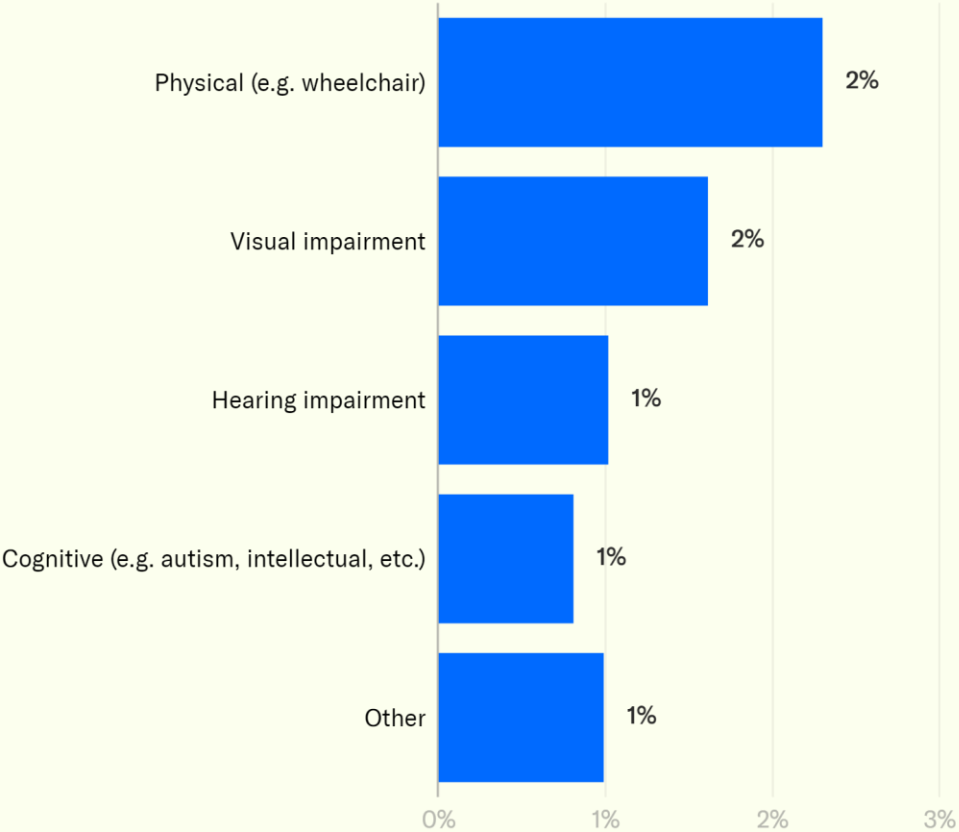
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
LGBTQ+	9%	6%	8%	10%	6%
Heterosexual	91%	94%	92%	90%	94%
Base	537	245	173	134	53

Question: Do you consider yourself to be LGBTQ+? Select one.
Base: Total visitors. 537 completed surveys.

6% of Reno Tahoe visitors report having accessibility needs

Physical and visual impairments are the most commonly reported needs.

Accessibility Needs



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Physical (e.g. wheelchair)	2%	3%	2%	3%	4%
Visual impairment	2%	4%	4%	1%	0%
Hearing impairment	1%	2%	2%	0%	0%
Cognitive (e.g. autism, intellectual, etc.)	1%	1%	0%	1%	0%
Other	1%	2%	0%	1%	0%
Base	548	247	174	135	59

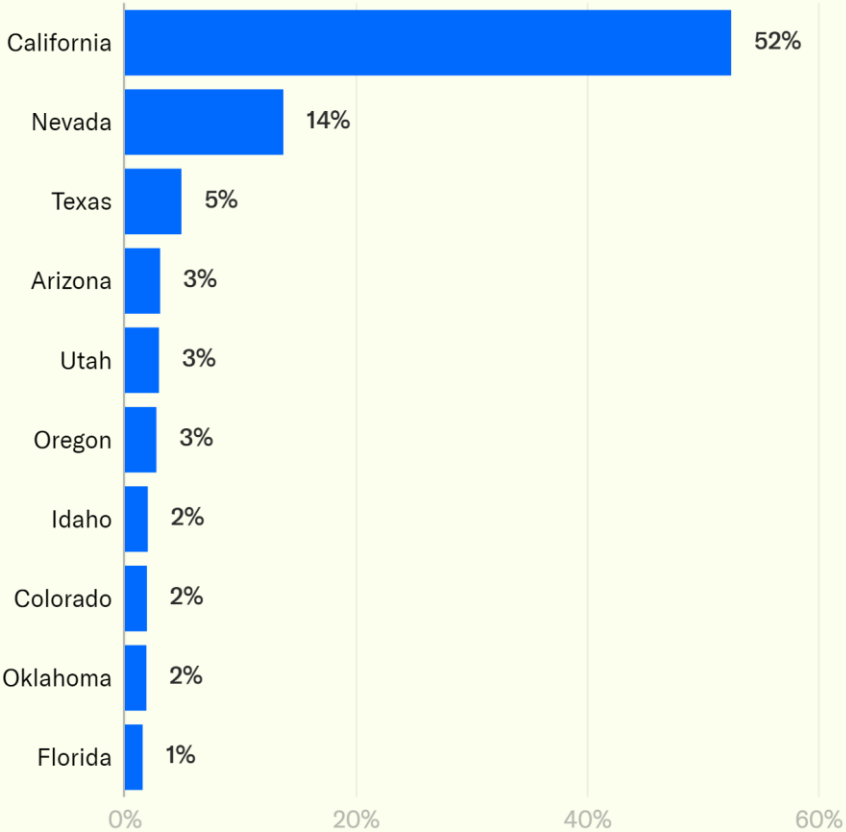
Question: Which of the following best describes the condition? Select all that apply.
Base: Recent Visitor (2023) visitors.548 completed surveys.

Visitor Origin Markets

Over half of Reno Tahoe visitors are from California

52% of visitors are from California. Other top visitor markets by state are within the West, including Nevada, Texas, Arizona, Utah and Oregon. As expected, there is more geographic diversity amongst business travelers, although California, Nevada, Texas and Arizona remain top feeder markets.

Visitor Origin State—Top 10



Detail by Trip Purpose

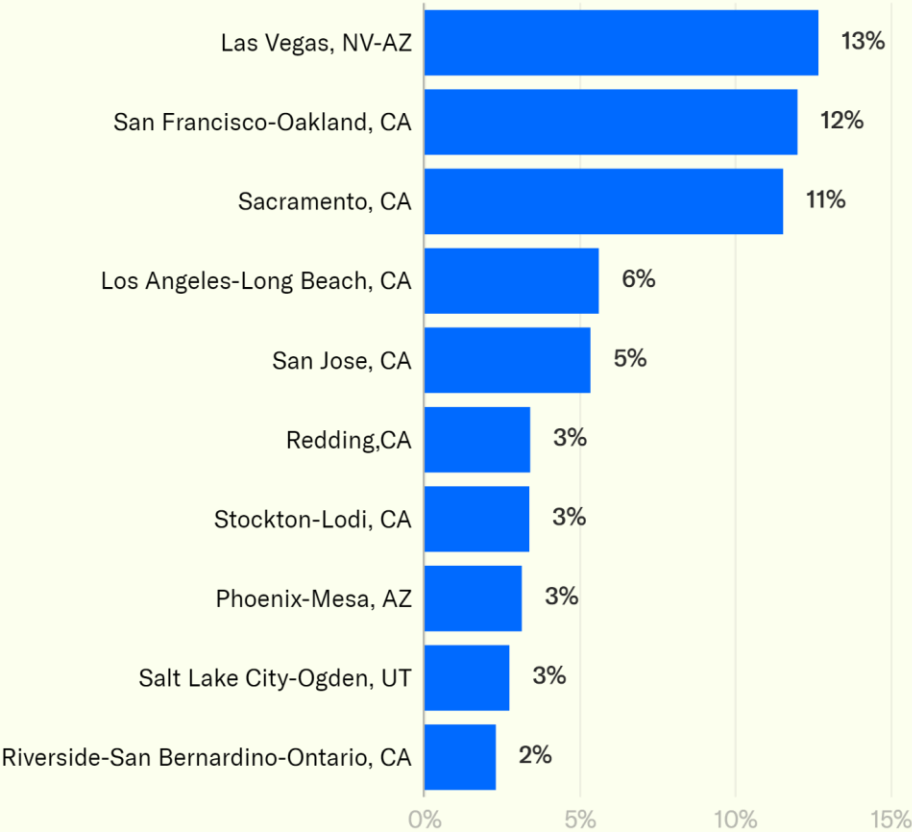
	Total	Leisure	Visit Friends/Relativ	Business	Event/Festival
California	52%	53%	53%	38%	53%
Nevada	14%	13%	16%	18%	14%
Texas	5%	5%	4%	8%	8%
Arizona	3%	3%	1%	3%	3%
Utah	3%	1%	3%	0%	7%
Oregon	3%	2%	4%	0%	9%
Idaho	2%	1%	7%	0%	0%
Colorado	2%	2%	3%	0%	0%
Oklahoma	2%	2%	0%	0%	0%
Florida	1%	1%	4%	0%	0%
Base	543	403	62	37	23

Question: What is your five-digit zip code?
Base: Total visitors. 543 completed surveys.

Las Vegas, the San Francisco Bay Area and Sacramento are the top origin markets by metro area

Visitation to Reno Tahoe is driven by the most populous areas in Northern California and in-state.

Visitor Origin Market by DMA—Top 10



Detail by Trip Purpose

	Total	Leisure	Visit Friends/Relativ	Business	Event/Festival
Las Vegas, NV-AZ	13%	12%	18%	20%	14%
San Francisco-Oakland, CA	12%	12%	21%	7%	13%
Sacramento, CA	11%	11%	17%	1%	6%
Los Angeles-Long Beach, CA	6%	6%	1%	2%	15%
San Jose, CA	5%	6%	4%	12%	0%
Redding,CA	3%	2%	7%	0%	0%
Stockton-Lodi, CA	3%	4%	3%	0%	5%
Phoenix-Mesa, AZ	3%	4%	0%	4%	3%
Salt Lake City-Ogden, UT	3%	1%	0%	0%	7%
Riverside-San Bernardino-Ontario, CA	2%	1%	7%	9%	6%
Base	484	365	50	33	20

Question: What is your five-digit zip code?
Base: Total visitors. 484 completed surveys.

Trip Details

This section presents findings on Reno Tahoe visitors' trip behaviors.

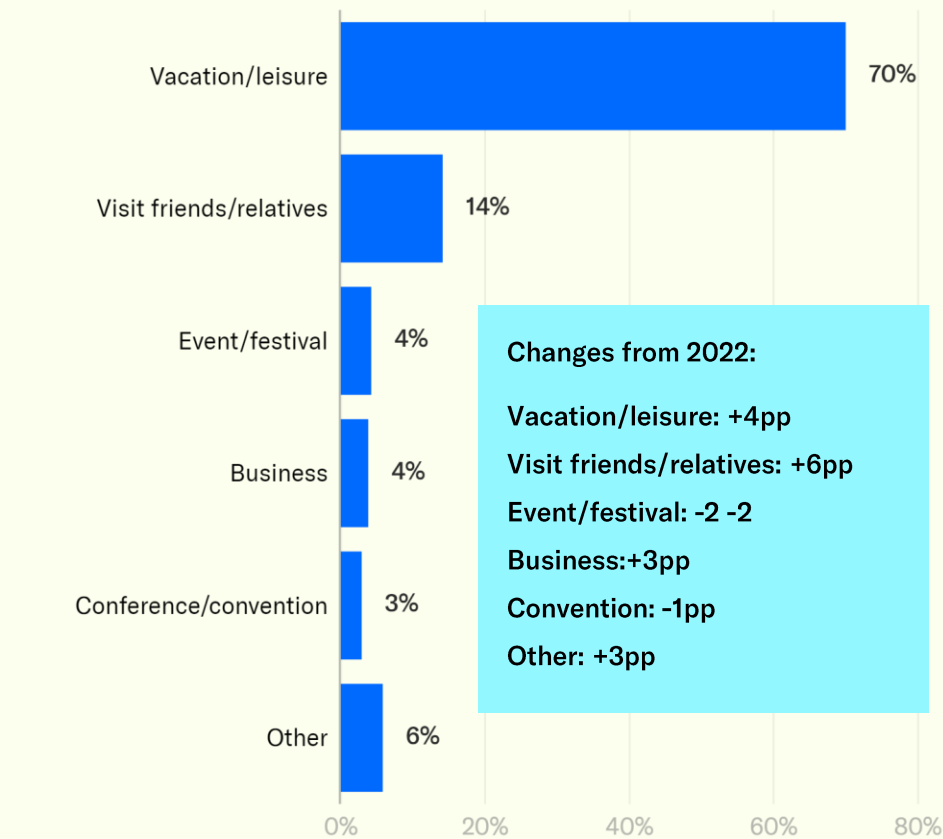
Differences between relevant segments are noted in the tables presented on the right side of the page.



Vacations are the primary purpose for the majority of trips to Reno Tahoe

70% of visitors to Reno Tahoe say their primary trip purpose is vacation/leisure. Another 14% primarily come to visit friends and/or relatives. Special events and festivals specifically drive 4% of visitors. Business and convention travelers represent 7% of visitors.

Primary Purpose of Trip



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Vacation/leisure	70%	74%	77%	83%	24%
Visit friends/relatives	14%	8%	4%	6%	68%
Event/festival	4%	6%	5%	3%	4%
Business	4%	5%	7%	2%	0%
Conference/convention	3%	4%	4%	4%	0%
Other	6%	2%	4%	2%	5%
Base	548	247	174	135	59

Question: What was the primary purpose of your last visit to Reno Tahoe?
Base: Total visitors. 548 completed surveys.

Business travelers to Reno Tahoe often extend their trips for leisure

Over half of business travelers to Reno Tahoe extend their trips to accommodate leisure activities. *Note: As this finding is based on a small sample size it should only be taken as informational rather than directional

Business Trip Extension

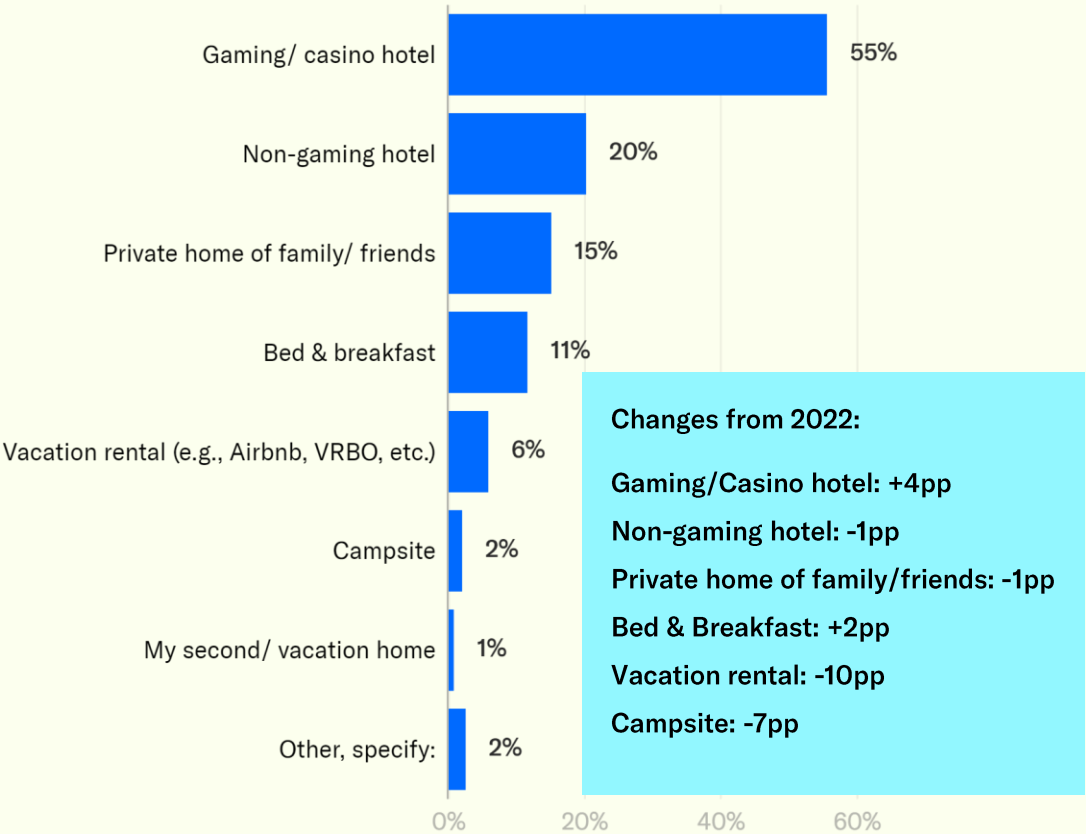


Question: Did you extend your trip to Reno Tahoe for leisure purposes?
Base: Total business visitors. 37 completed surveys.

Over half of Reno Tahoe visitors stay in casino hotels. Vacation rental and B&B usage is driven by younger visitors

Overall, 55% of Reno Tahoe visitors stay in gaming/casino hotels and another 20% stay in non-gaming hotels. 15% of visitors are hosted in the private residences of local family or friends. Vacation rentals (6%) and bed & breakfasts (11%) are more popular with younger visitors, particularly Millennial-age, who are more than twice as likely to use these lodging options in the area.

Accommodation Type



Detail by Generation

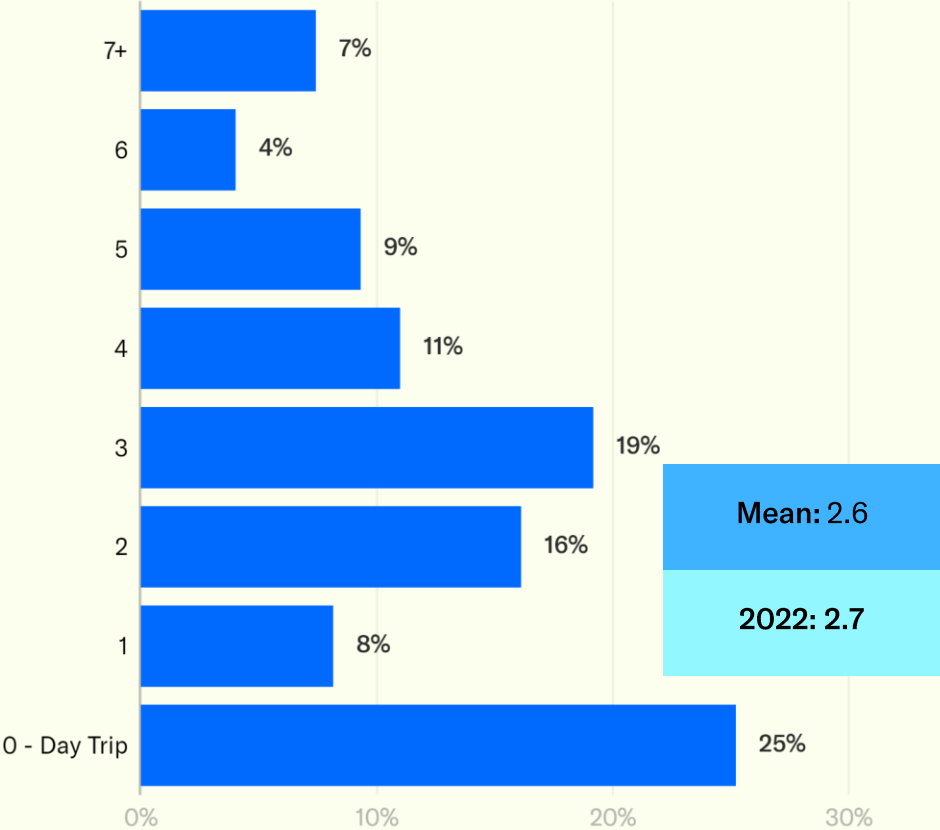
	Total	Gen Z	Millennials	Gen X	Boomers+
Gaming/ casino hotel	55%	57%	52%	63%	51%
Non-gaming hotel	20%	5%	26%	15%	26%
Private home of family/ friends	15%	29%	10%	14%	15%
Bed & breakfast	11%	13%	22%	2%	6%
Vacation rental (e.g., Airbnb, VRBO, etc.)	6%	7%	9%	4%	2%
Campsite	2%	3%	2%	1%	2%
My second/ vacation home	1%	1%	0%	1%	1%
Other, specify:	2%	0%	1%	5%	3%
Base	524	52	258	114	100

Question: What type of lodging did you use on your last trip to Reno Tahoe? Select all that apply.
Base: Total visitors. 524 completed surveys.

Overnight visitors to Reno Tahoe stay more than 3-nights on average

Visitors who stay in vacation rentals have the longest average lengths of stay in Reno Tahoe at 4.3 nights. Casino hotel guests stay 3.5 nights on average and non-gaming hotel guests stay slightly longer at 3.8 average nights. VFR visitors typically stay 3.4 nights. 25% of visitors are day-trippers to Reno Tahoe. The average length of stay across all visitors in 2.6 nights.

Trip Length in Nights



Detail by Lodging Type

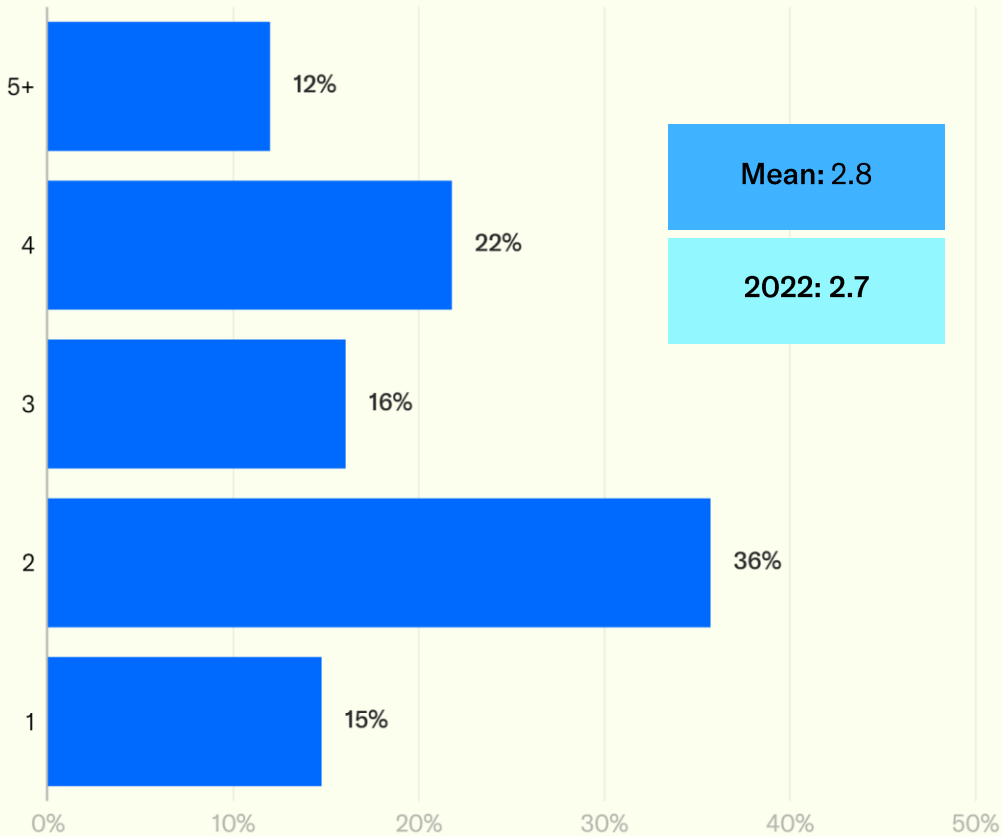
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
7+	7%	10%	9%	13%	6%
6	4%	5%	8%	14%	8%
5	9%	12%	17%	12%	11%
4	11%	12%	17%	21%	14%
3	19%	25%	25%	30%	29%
2	16%	26%	11%	8%	20%
1	8%	10%	11%	2%	12%
0 - Day Trip	25%	0%	0%	0%	0%
Mean (Nights)	2.6	3.5	3.8	4.3	3.4
Base	526	239	164	124	56

Question: How many nights did you stay in Reno Tahoe on your last trip?
Base: Total visitors. 526 completed surveys.

The average travel party size to Reno Tahoe is 2.8 people

Visitors who stay in vacation rentals have the largest average travel party size at 3.3 people. The average travel party of casino hotel guests is comprised of 2.8 people, while those staying in non-gaming hotels are typically in parties of 2.9. The average VFR travel party is 2.9 people. 15% of visitors are traveling solo.

Travel Party Size



Detail by Lodging Type

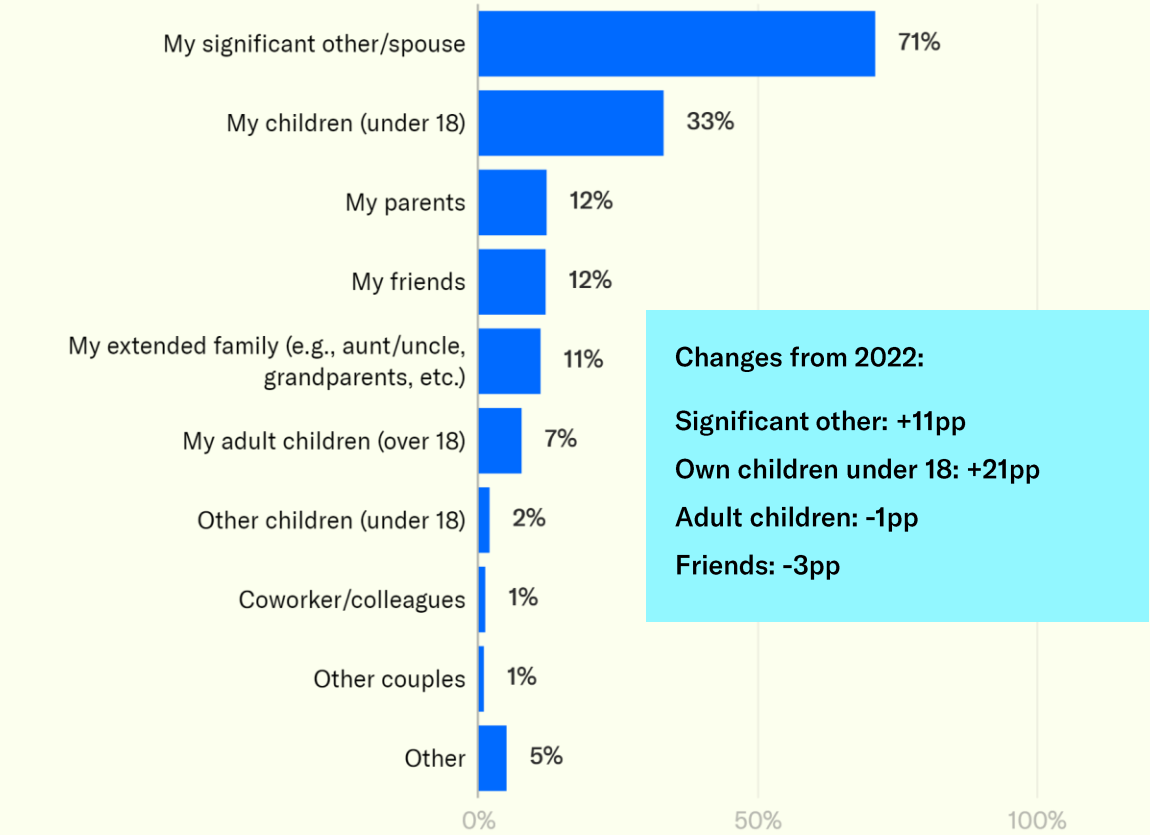
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
5+	12%	8%	9%	15%	15%
4	22%	20%	29%	29%	20%
3	16%	20%	16%	23%	24%
2	36%	44%	34%	26%	22%
1	15%	8%	12%	7%	19%
Mean	2.8	2.8	2.9	3.3	2.9
Base	530	241	170	126	56

Question: Including yourself, how many people were in your immediate travel party on your last trip to Reno Tahoe?
Base: Total visitors. 530 completed surveys.

Over 70% of visitors are traveling with their significant other, one-third with their minor children

Millennial-age visitors are the likeliest to be traveling with their young children (54%). GenZ visitors are the likeliest to be traveling with their parents (33%) and extended family (37%), and the least likely to be traveling with a significant other (47%). GenX age visitors are the likeliest to be traveling with friends (19%) and/or their adult children (15%). Boomer-age visitors are the likeliest to be traveling with other couples. In addition, those that stay in vacation rentals typically have more diverse travel party composition, with more types of family members and friends.

Travel Party Composition



Detail by Generation

	Total	Gen Z	Millennials	Gen X	Boomers+
My significant other/spouse	71%	47%	76%	76%	74%
My children (under 18)	33%	15%	54%	41%	1%
My parents	12%	33%	14%	6%	0%
My friends	12%	14%	10%	19%	6%
My extended family (e.g., aunt/uncle, grandparents, etc.)	11%	37%	7%	3%	6%
My adult children (over 18)	7%	0%	3%	15%	12%
Other children (under 18)	2%	2%	2%	0%	3%
Coworker/colleagues	1%	0%	2%	0%	0%
Other couples	1%	0%	0%	0%	3%
Other	5%	2%	4%	0%	14%
Base	491	50	251	108	82

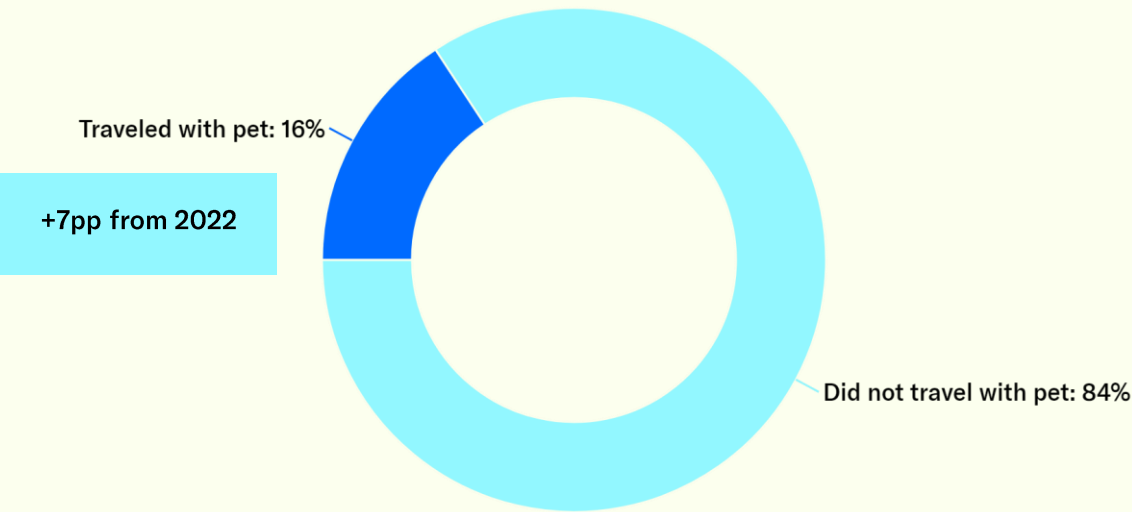
Question: Who did you travel with on your last visit to the Reno Tahoe region? Select all that apply.

Base: Total visitors. 491 completed surveys.

16% of Reno Tahoe visitors have their pet accompany them on their trip

About a quarter of visitors who stayed in vacation rentals on their Reno Tahoe trip brought their pet with them. Just over one-in-five hotel visitors also said they traveled with their pet.

Traveled with a Pet



Detail by Lodging Type

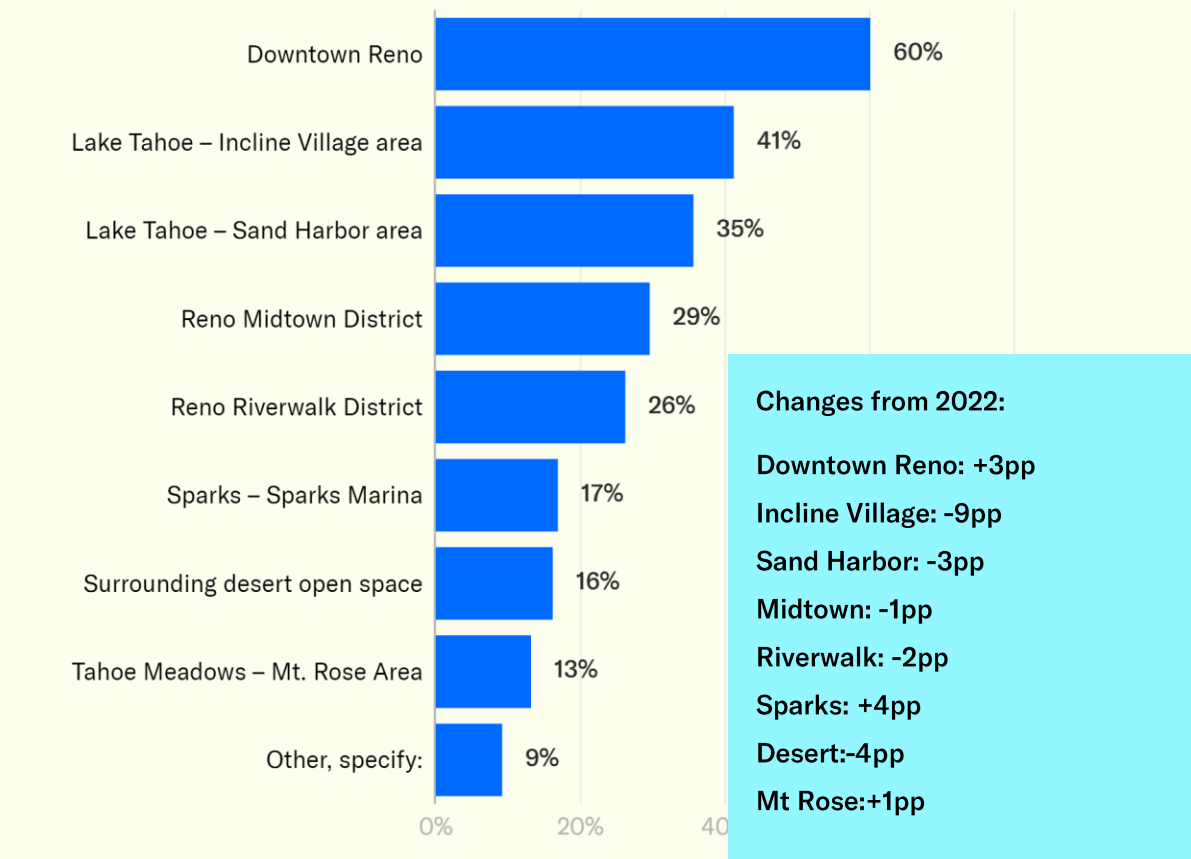
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Traveled with pet	16%	14%	21%	24%	25%
Did not travel with pet	84%	86%	79%	76%	75%
Base	548	247	174	135	59

Question: Did you travel with a pet on your last visit to the Reno Tahoe region?
Base: Total visitors. 548 completed surveys.

Downtown Reno, Incline Village and the Sand Harbor area are most popular with visitors

Reno Midtown District and Reno Riverwalk District also draw more than a quarter of visitors, with the former even more popular with casino hotel guests and VFRs. Vacation rental visitors are the most diverse in the areas of Reno they visit on their trips.

Reno Tahoe Areas Visited



Detail by Lodging Type

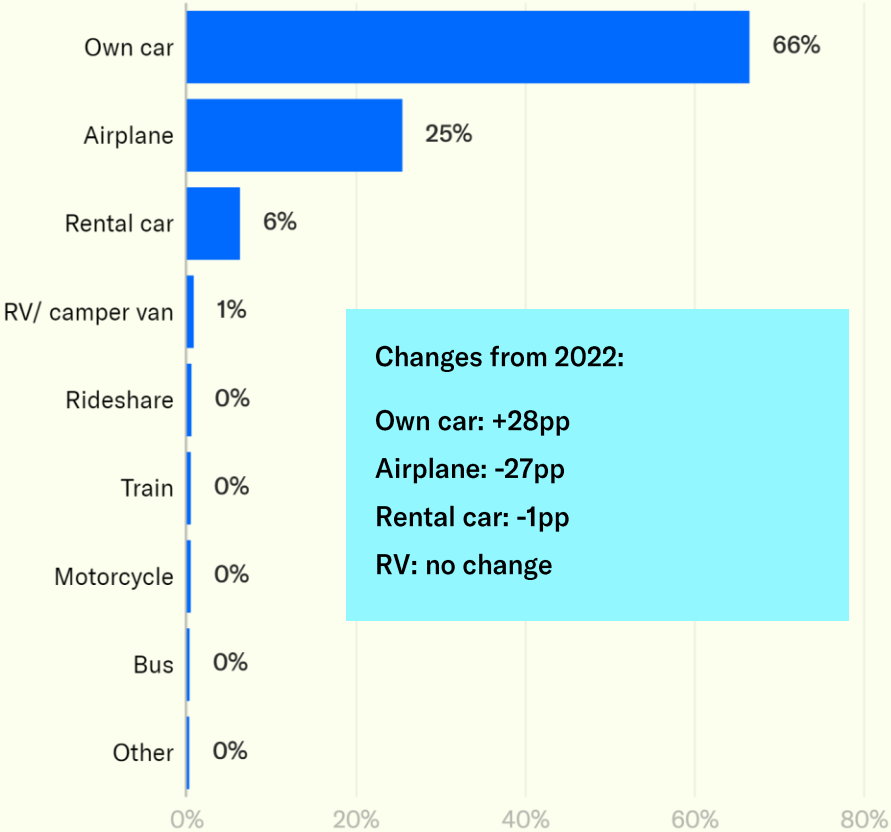
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Downtown Reno	60%	73%	68%	47%	55%
Lake Tahoe – Incline Village area	41%	43%	51%	57%	30%
Lake Tahoe – Sand Harbor area	35%	36%	42%	48%	32%
Reno Midtown District	29%	37%	26%	33%	36%
Reno Riverwalk District	26%	33%	33%	34%	22%
Sparks – Sparks Marina	17%	21%	20%	26%	28%
Surrounding desert open space	16%	16%	21%	14%	21%
Tahoe Meadows – Mt. Rose Area	13%	17%	21%	28%	10%
Other, specify:	9%	3%	3%	1%	16%
Base	548	247	174	135	59

Question: Did you visit any of the following areas on your last trip to the Reno Tahoe region? Select all that apply.
Base: Total visitors. 548 completed surveys.

While the majority of visitors arrive in their personal vehicles, a quarter arrive by airplane

Two-thirds of Reno Tahoe visitors report they arrived in the destination in their personal vehicle. One-quarter came via air. The remainder arrived in the area via other methods including rental car (6%) and RV (1%).

Arrival Transportation



Detail by Lodging Type

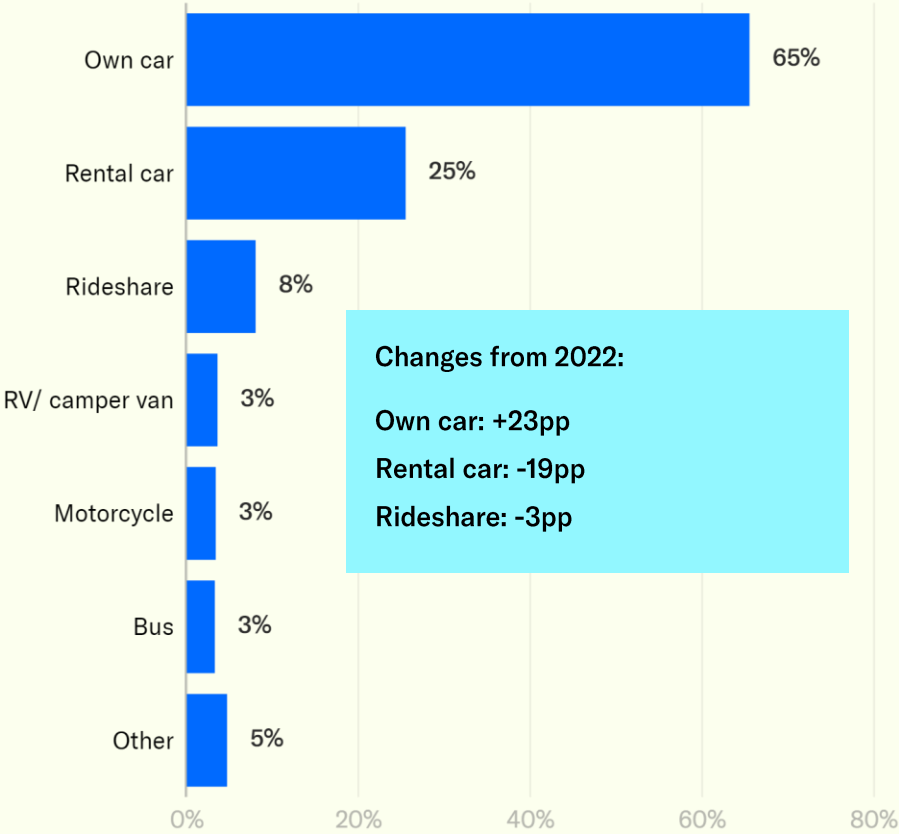
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Own car	66%	58%	40%	47%	72%
Airplane	25%	32%	45%	42%	18%
Rental car	6%	7%	12%	9%	5%
RV/ camper van	1%	1%	1%	0%	1%
Rideshare	0%	1%	0%	0%	1%
Train	0%	1%	1%	2%	0%
Motorcycle	0%	0%	1%	1%	0%
Bus	0%	0%	0%	0%	2%
Other	0%	0%	0%	0%	1%
Base	491	227	159	126	48

Question: On your last trip, what type of transportation did you use to arrive to the Reno Tahoe region?
Base: Total visitors. 491 completed surveys.

25% of visitors use a rental car for in-market transportation; 8% use rideshare services

While the majority of visitors continue to use their personal vehicles to transport themselves around the Reno Tahoe region during their trips, there is also important usage of other transportation methods. Visitors who stay in vacation rental are likeliest to use rental cars, rideshares and buses during their trip.

In-Destination Transportation



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Own car	65%	59%	43%	51%	71%
Rental car	25%	28%	43%	44%	12%
Rideshare	8%	11%	9%	11%	2%
RV/ camper van	3%	4%	7%	4%	0%
Motorcycle	3%	3%	5%	4%	2%
Bus	3%	3%	3%	8%	2%
Other	5%	4%	2%	2%	13%
Base	548	247	174	135	59

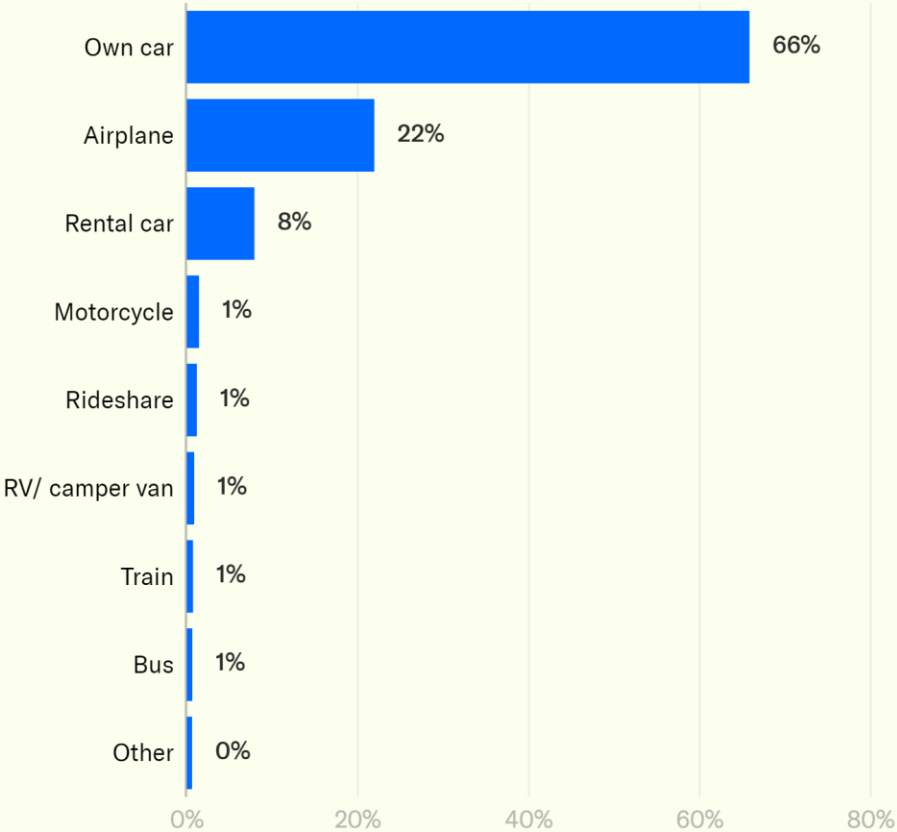
Question: On your last trip, what types of transportation did you use to travel within the Reno Tahoe region?

Base: Total visitors. 548 completed surveys.

Visitors largely leave Reno Tahoe by the method they arrive

However, there is a slight increase in usage of rental cars and other transportation methods outside of personal cars and airlines.

Departure Transportation



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Own car	66%	58%	38%	48%	72%
Airplane	22%	26%	38%	30%	18%
Rental car	8%	10%	11%	18%	5%
Motorcycle	1%	2%	5%	1%	0%
Rideshare	1%	1%	3%	2%	1%
RV/ camper van	1%	1%	2%	0%	1%
Train	1%	1%	2%	0%	0%
Bus	1%	1%	1%	1%	2%
Other	0%	1%	0%	0%	1%
Base	548	247	174	135	59

Question: On your last trip, what type of transportation did you use to depart from the Reno Tahoe region?
Base: Total visitors. 548 completed surveys.

Activities

This section presents findings on Reno Tahoe visitors' activities while they were in-market, as well as the activities that motivated their trip.



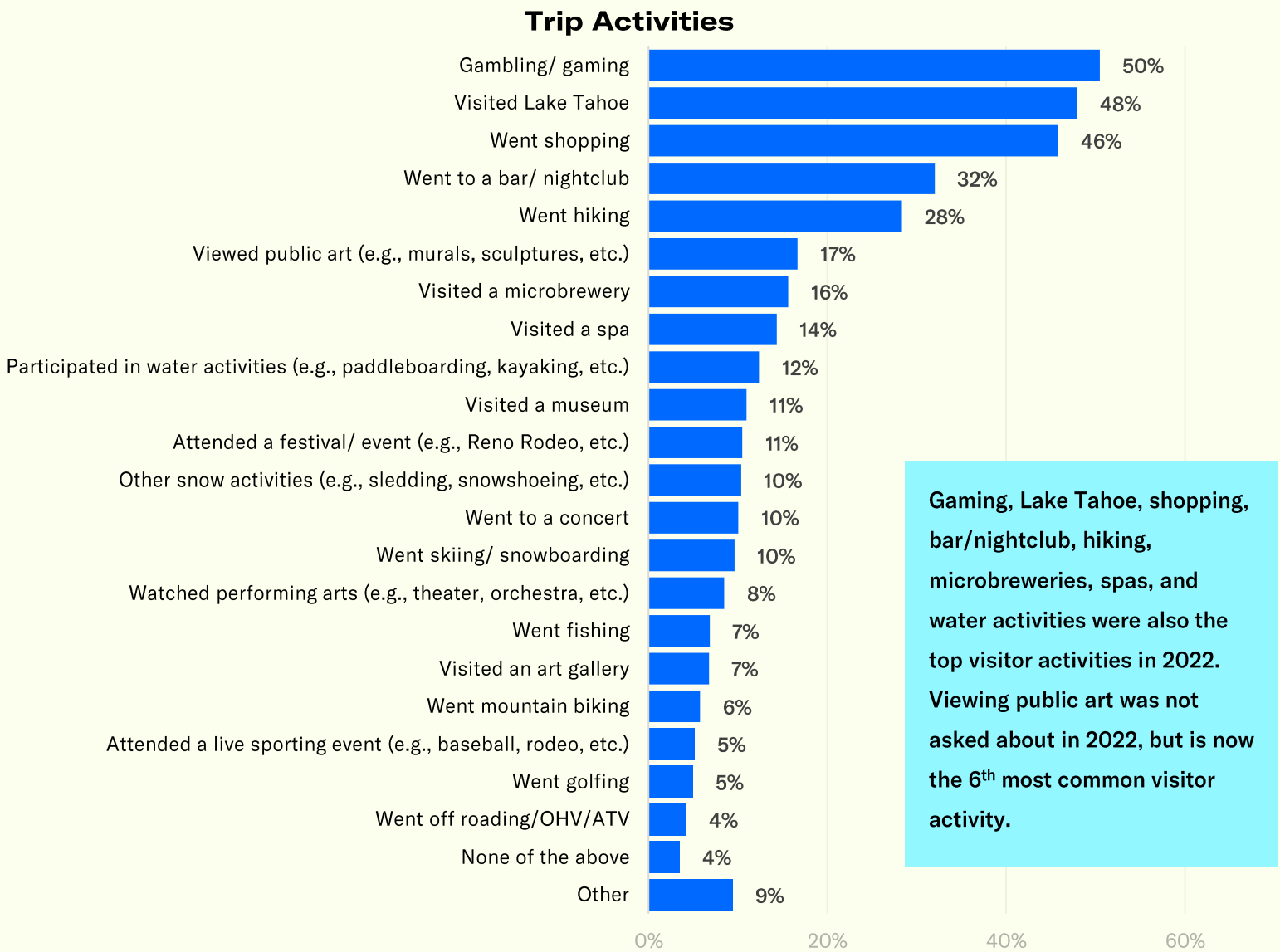
The top visitor activities include gaming, visiting Lake Tahoe and shopping

Nightlife and hiking are also popular visitor activities. Important shares of visitors also view public art, visit microbreweries and go to spas.

Key Differences between Visitor Segments:

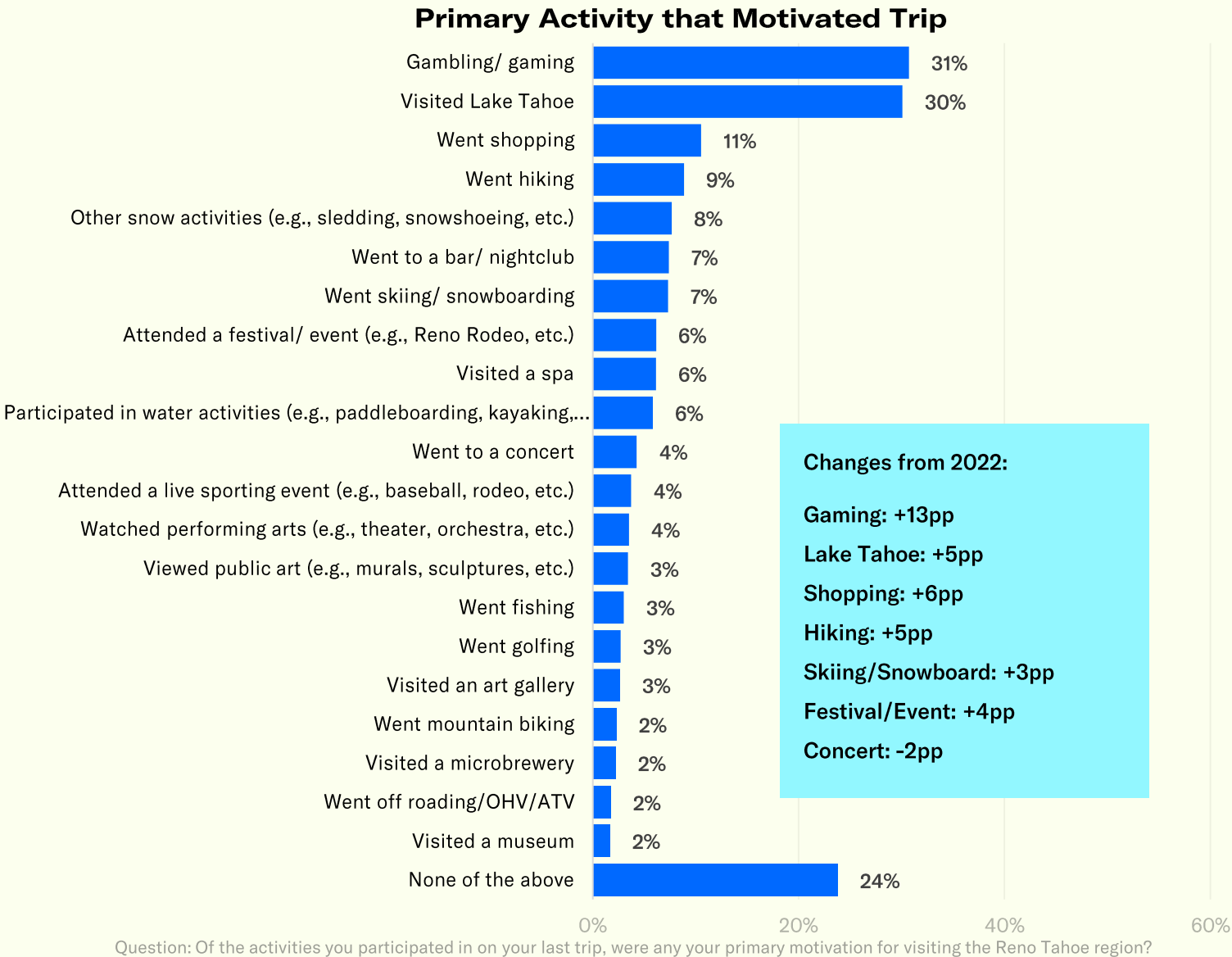
Leisure visitors are much likelier to visit Lake Tahoe and participate in water, snow and other outdoor recreation activities during their trip, whereas VFRs are likeliest to go shopping. Those with children in their travel party are the among the likeliest to go skiing, participate in water sports and visit museums.

As expected, Cultured Creatives are the likeliest to view public art, watch performing arts and visit art galleries. Ambitious Adventurers are likeliest to visit Lake Tahoe, go skiing/snowboarding, go to bars/nightclubs, mountain biking, attend festivals and sporting events, and visit a spa.



Gaming and Lake Tahoe are the primary motivators of visitation

In addition to reporting the activities they partook in on their Reno Tahoe trip, recent visitors were also asked if any of those activities served as primary motivation for visiting the Reno Tahoe region. Nearly one-third of recent visitors say that gaming and/or visiting Lake Tahoe were indeed primary motivators for their visit. About one-in-ten visitors say shopping, hiking and skiing/other snow activities were prime motivations for visiting.



Visitor Spending

This section presents estimates of detailed in-market spending by Reno Tahoe visitors during their trips.

Spending is shown by total trip per travel party, as well as daily per-person.



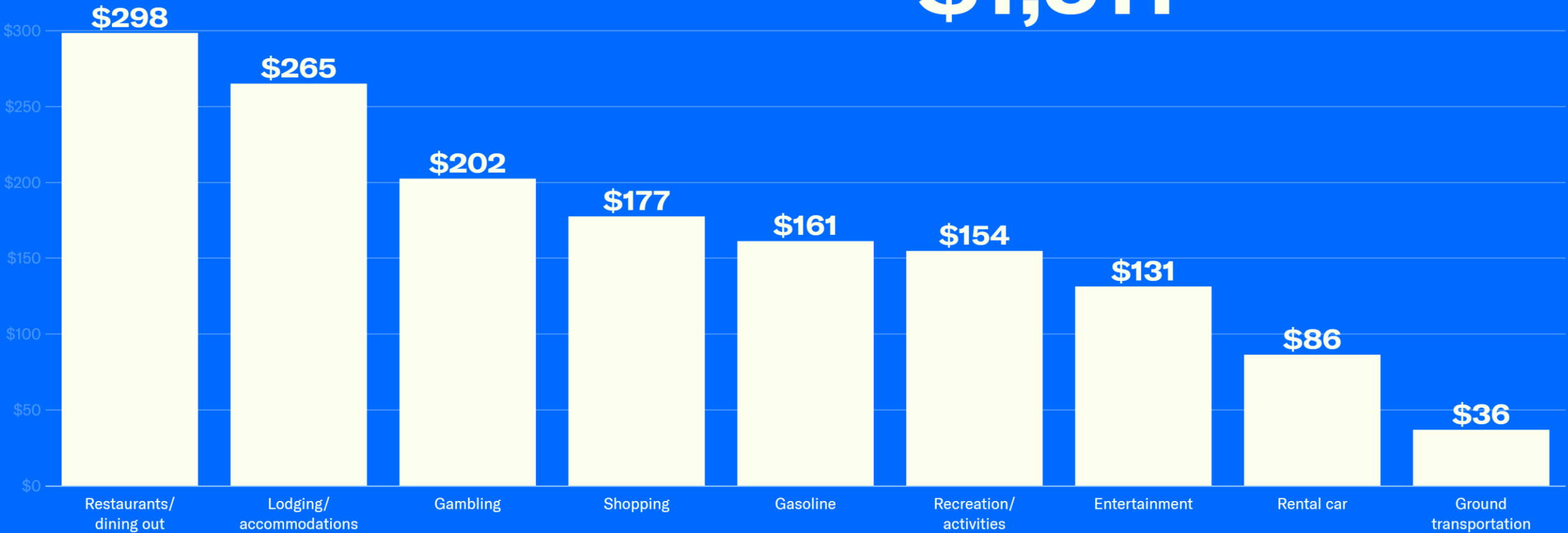
The typical visitor party spends \$1,511 in Reno Tahoe on their trip

Each person in the travel party represents \$589 in trip spending. The greatest visitor expenditures are on restaurants and lodging, followed by gambling and shopping.

Trip Spend per Party by Category

Average People Covered by Spend 2.6
Average Length of Stay 2.6

Total Average Spend
\$1,511



Question: On your last trip, approximately how much did you spend PER DAY in each of the following categories:

Base: Total visitors. 496 completed surveys.

The average visitor to Reno Tahoe represents \$223 in daily in-market spending

Taken down to a daily, per person level, every Reno Tahoe visitor spends an average of \$223 in-market each day on their trip.



Question: On your last trip, approximately how much did you spend PER DAY in each of the following categories:
Base: Total visitors. 496 completed surveys.

Driven by restaurant spending, Mindful Moms and Ambitious Adventurers have the highest daily trip party spending; vacation rental visitors spend the most on lodging

	Total	Leisure	VFR	Business/ Convention	Hotel	Private Home Friends/Family	Vacation Rental	Cultured Creative	Mindful Mom	Ambitious Adventurer	Children in Travel Party
Restaurants/ dining out	112.8	124.6	83.9	108.2	132.2	84.8	131.1	130.4	141.3	143.5	128.4
Lodging/ accommodations	100.2	113.6	59.2	71.2	156.6	22.6	171.3	134.9	102.4	151.7	115.9
Gambling	76.5	89.9	44.3	49.5	94.7	36.8	76.1	72.2	102.9	116.1	74.5
Shopping	67.1	71.3	72.3	74.0	86.2	77.1	106.6	105.1	121.5	129.5	102.5
Gasoline	60.9	64.2	52.6	40.6	64.2	44.4	72.6	74.6	66.5	70.9	66.5
Recreation/ activities	58.4	70.3	31.6	48.2	70.8	34.0	124.0	83.3	106.0	120.0	95.5
Entertainment	49.6	61.2	16.1	36.4	63.9	25.1	105.7	86.8	88.1	111.9	83.6
Rental car	32.5	35.4	26.1	36.2	48.5	11.3	53.3	56.7	69.9	78.5	63.5
Ground transportation (e.g., parking, ride share, etc.)	13.8	16.3	8.3	11.9	18.8	7.7	36.2	28.8	39.6	41.3	27.8
Total	\$572	\$647	\$394	\$476	\$736	\$344	\$877	\$773	\$838	\$963	\$758

Visitor Experience

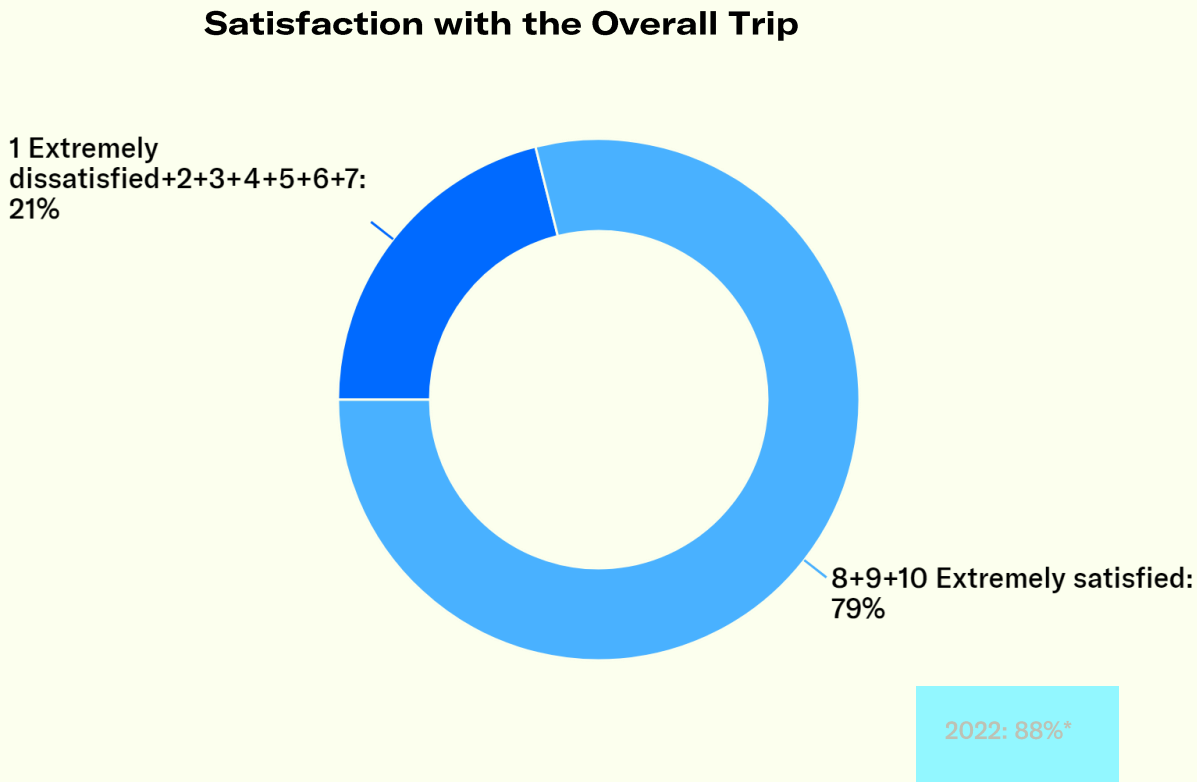
This section presents findings on Reno Tahoe visitors' assessment of their trip experience, including their satisfaction with various aspects of the experience and their likelihood to return and recommend the destination.

Differences between relevant segments are noted in the tables presented on the right side of the page. Asterisks designate when a question was asked differently compared to 2022.



Nearly 80% of visitors report high satisfaction with their overall trip experience

Recent Reno Tahoe visitors were asked to rate their level of satisfaction with aspects of their trip using a 10-point scale from “1—Extremely Dissatisfied” to “10—Extremely Satisfied.” Regarding their satisfaction with their overall trip to the region, 79% of visitors report high levels of satisfaction (8,9, or 10). About one-in-five visitors (21%) rated their satisfaction as a 7 or lower, with 8% who were in the 1-4 range.

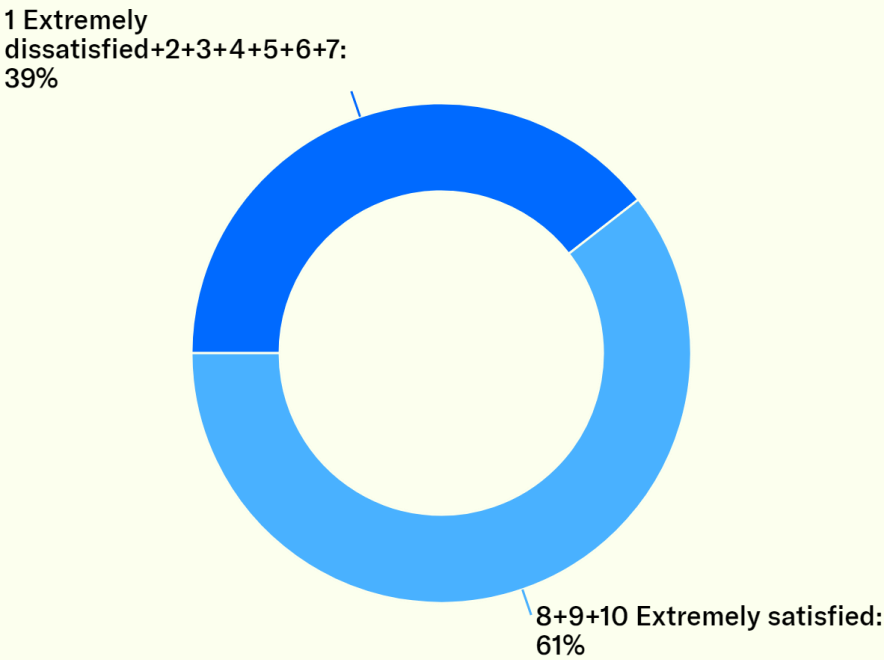


Question: On your last trip to Reno Tahoe, how satisfied are you with... Overall trip
Base: Total visitors. 548 completed surveys.

Reno Tahoe visitors are less satisfied with the value they received for the financial investment they made in their trip

In contrast to their overall trip experience, just 61% of recent Reno Tahoe visitors reportt high levels of satisfaction with the value they perceived they received for the money they spent in Reno Tahoe. Meanwhile, 7% rated their (dis)satisfaction in the 1-4 range.

Satisfaction with the Value for Money



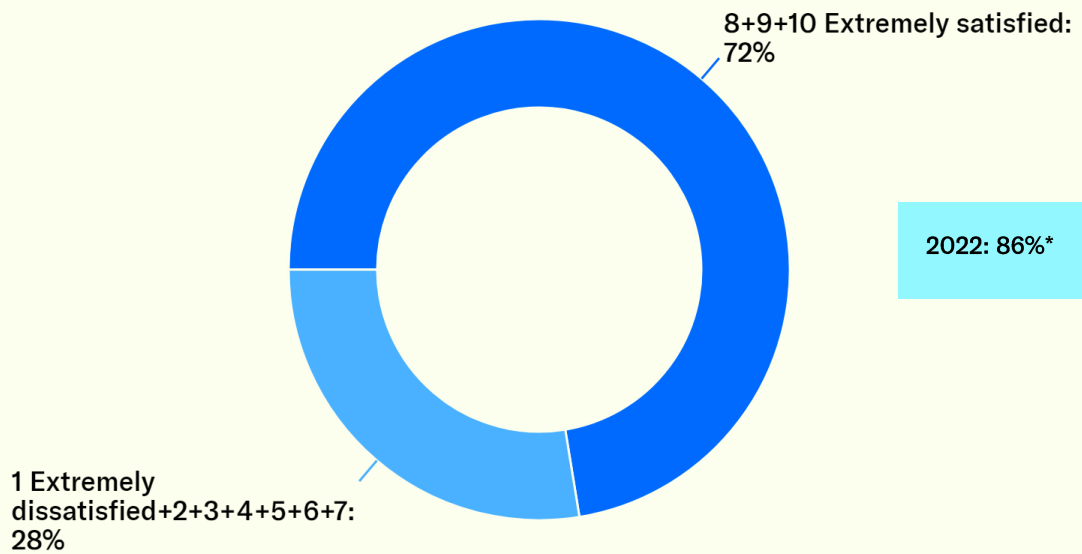
Not asked in 2022

Question: On your last trip to Reno Tahoe, how satisfied are you with... Value for money
Base: Total visitors. 548 completed surveys.

More than 70% of visitors are highly satisfied with the quality of accommodations in Reno Tahoe

In total, 72% of Reno Tahoe visitors rate their satisfaction with the quality of the destination’s accommodations an 8 or higher on a 10-point scale. 6% rated their (dis)satisfaction in the 1-4 range.

Satisfaction with the Quality of Accommodations

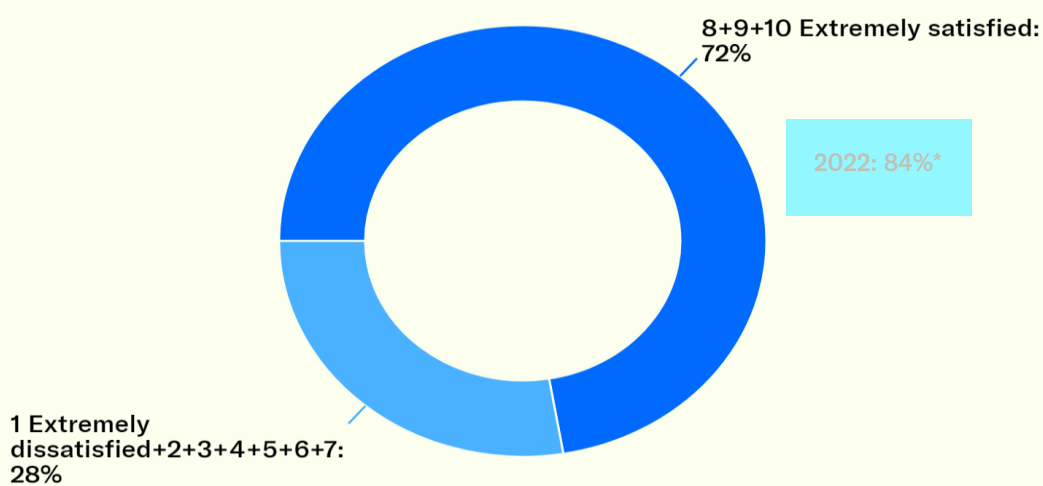


Question: On your last trip to Reno Tahoe, how satisfied are you with... Quality of Accommodations
Base: Total overnight visitors. 524 completed surveys.

Visitors are similarly satisfied with the hospitality and service they receive on their Reno Tahoe trips (72%)

In their assessment of the hospitality and service they received during their trip, 72% of visitors report high levels of satisfaction (8,9, or 10). The remainder (28%) rated their satisfaction as a 7 or lower, with 7% who were in the 1-4 range.

Satisfaction with Hospitality and Service

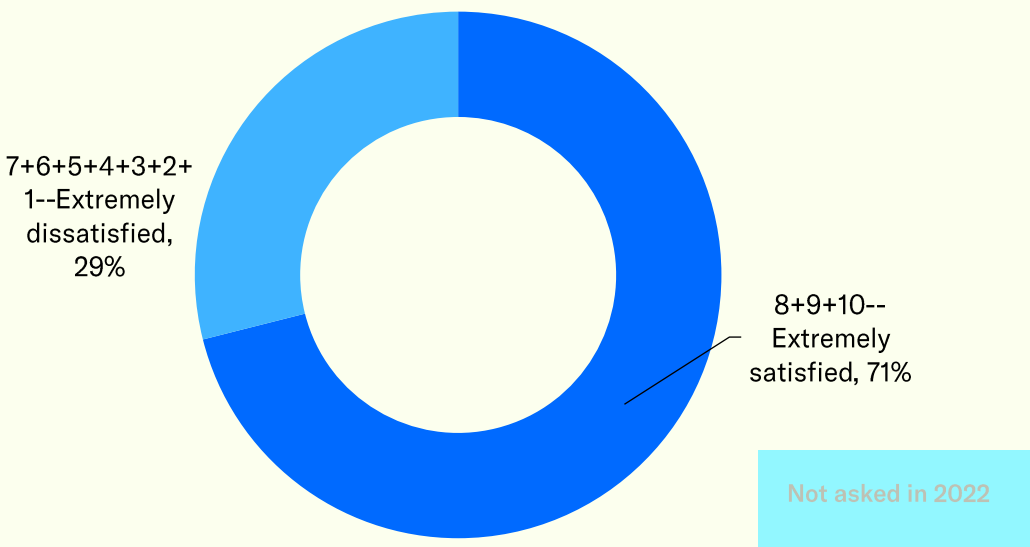


Question: On your last trip to Reno Tahoe, how satisfied are you with... Hospitality and service
Base: Total visitors. 548 completed surveys.

71% of Reno Tahoe visitor are highly satisfied with the available activities

In total, 71% of Reno Tahoe visitors rate their satisfaction with the destination’s activities an 8 or higher on a 10-point scale. 6% rated their (dis)satisfaction in the 1-4 range.

Satisfaction with Activities

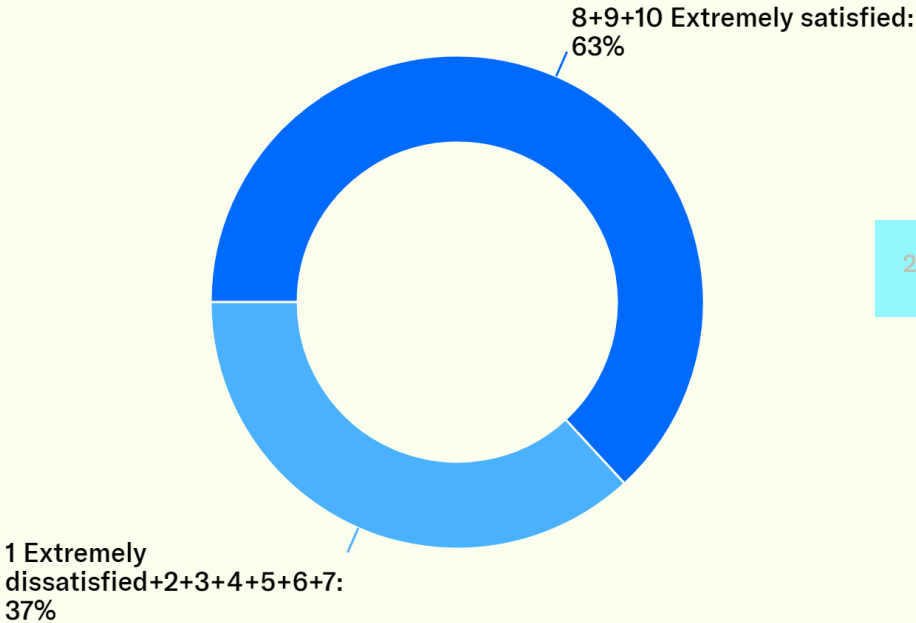


Question: On your last trip to Reno Tahoe, how satisfied are you with... Activities
Base: Total visitors. 548 completed surveys.

Visitors are less satisfied with their interactions with locals

Unlike other elements of their trip experience, just 63% of recent Reno Tahoe visitors reportt high levels of satisfaction with their interactions with locals. The remainder (37%) rated their satisfaction as a 7 or lower, with 7% who were in the 1-4 range.

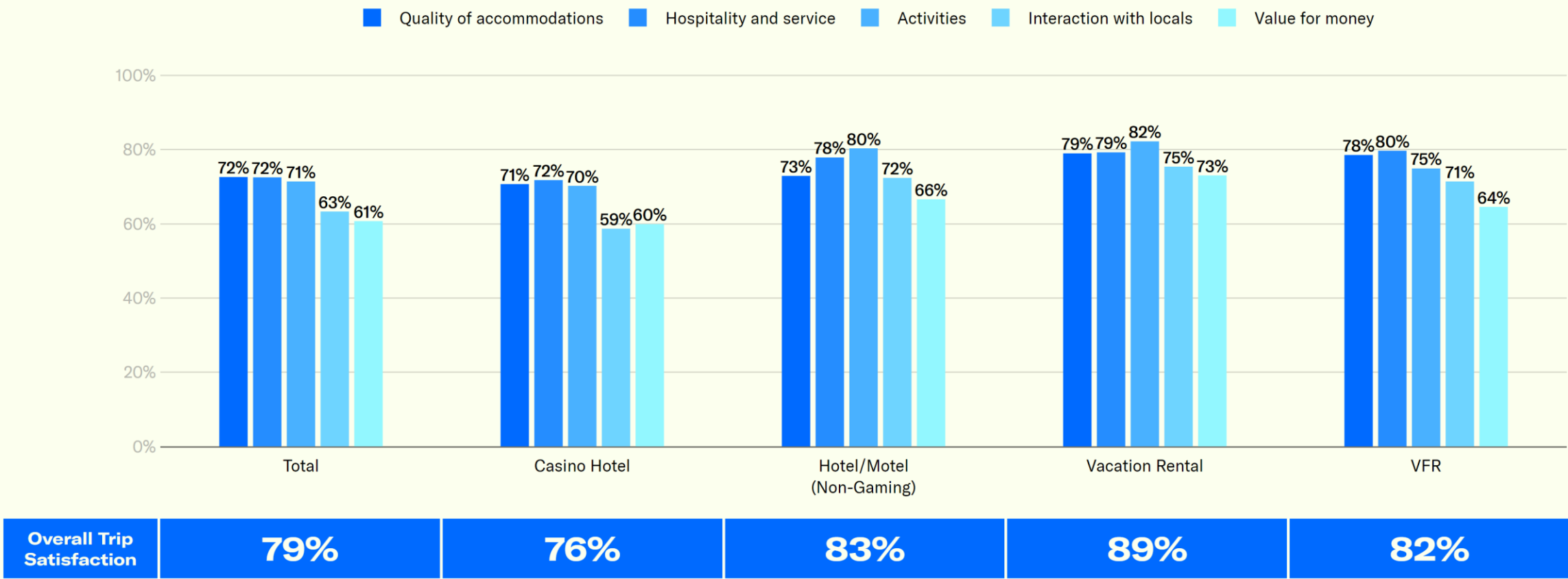
Satisfaction with Interactions with Locals



Question: On your last trip to Reno Tahoe, how satisfied are you with... Interactions with locals
Base: Total visitors. 548 completed surveys.

Casino hotels visitors exhibit the least satisfaction, driven by interactions with locals and value for the money. Vacation rental visitors have the highest satisfaction rates, due to area activities

Trip Satisfaction Summary—Detail by Lodging Type
(Top 3 Box Satisfaction - % rating "8", "9" or "10 - Extremely satisfied")

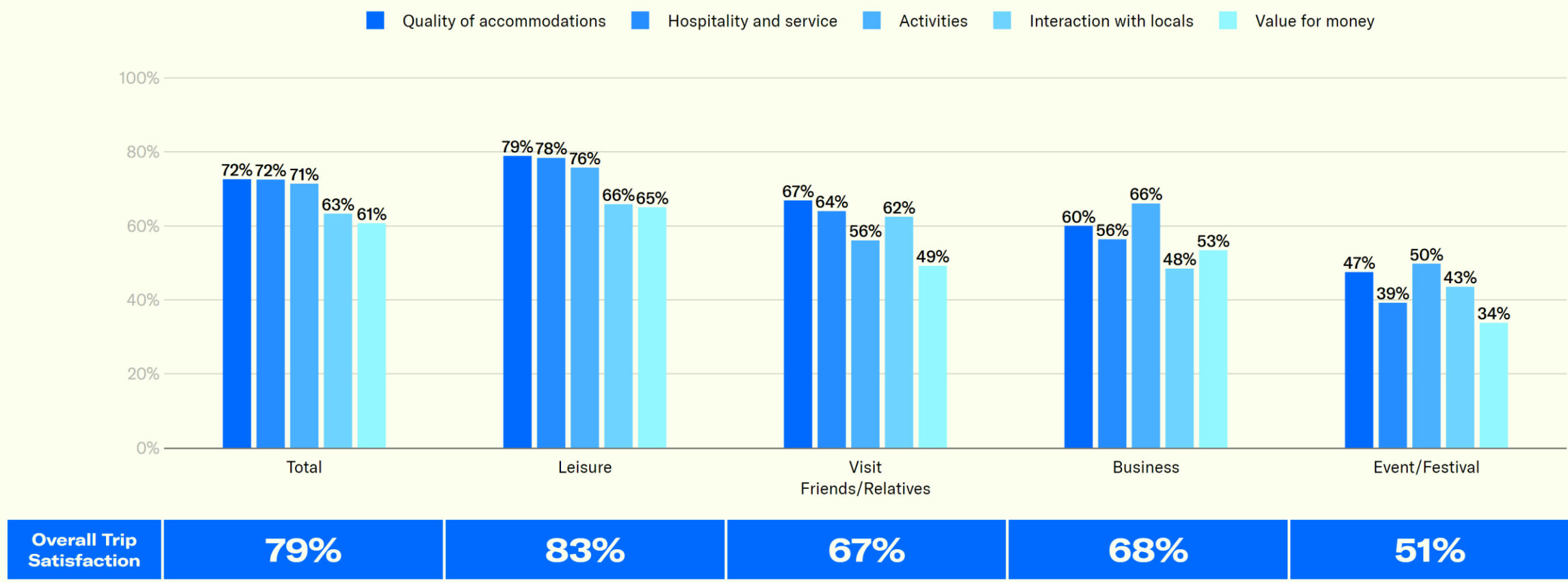


Question: Of the activities you participated in on your last trip, were any your primary motivation for visiting the Reno Tahoe region?
Base: Total visitors. 548 completed surveys.

Leisure visitors have high rates of satisfaction, business and event travelers less so

Business travelers have particularly lower satisfaction levels with their interactions with locals, while those that came specifically for an event and, interestingly, VFRs, have lower satisfaction levels with value for the money.

Trip Satisfaction Summary—Detail by Trip Purpose
(Top 3 Box Satisfaction - % rating "8", "9" or "10 - Extremely satisfied")



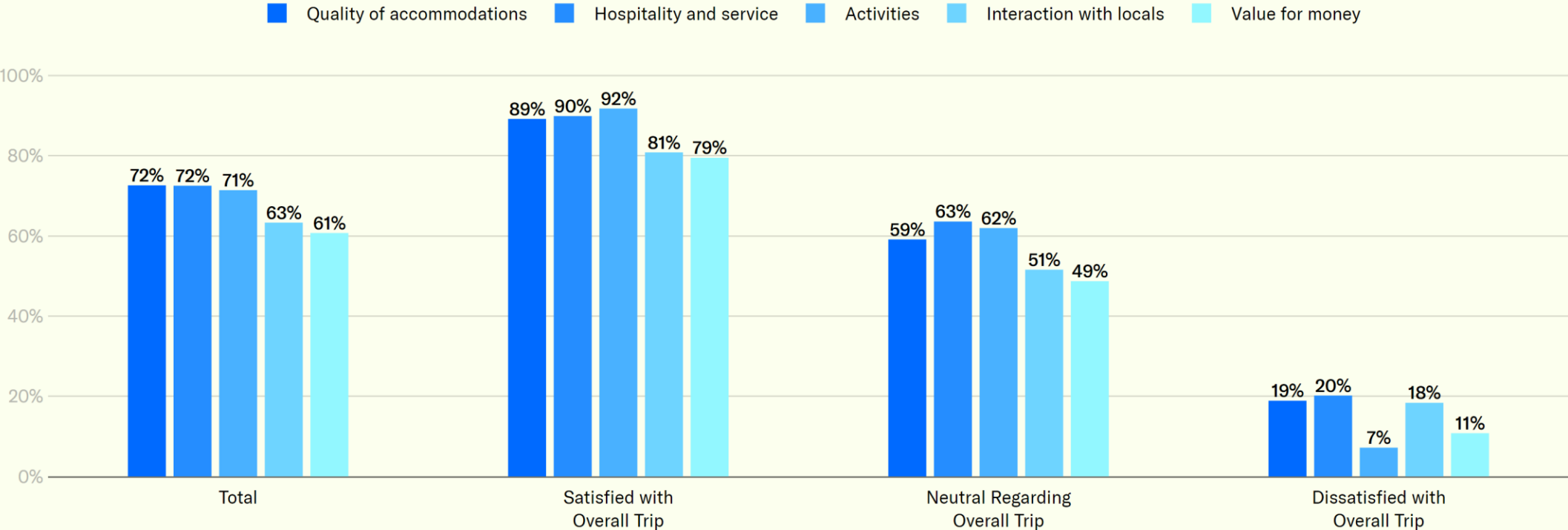
Question: Of the activities you participated in on your last trip, were any your primary motivation for visiting the Reno Tahoe region?
Base: Total visitors. 548 completed surveys.

Those highly dissatisfied with their overall trip have the least satisfaction with activities and the value for the money

Dissatisfied visitors engaged in less activities overall (18% participated in none of the 21 activities tested in the survey). At \$851 average trip spend (primarily on lodging and gas), they also spent less than the average visitor.

Trip Satisfaction by Summary—Detail by Overall Satisfaction Level

(Top 3 Box Satisfaction - % rating "8", "9" or "10 - Extremely satisfied")



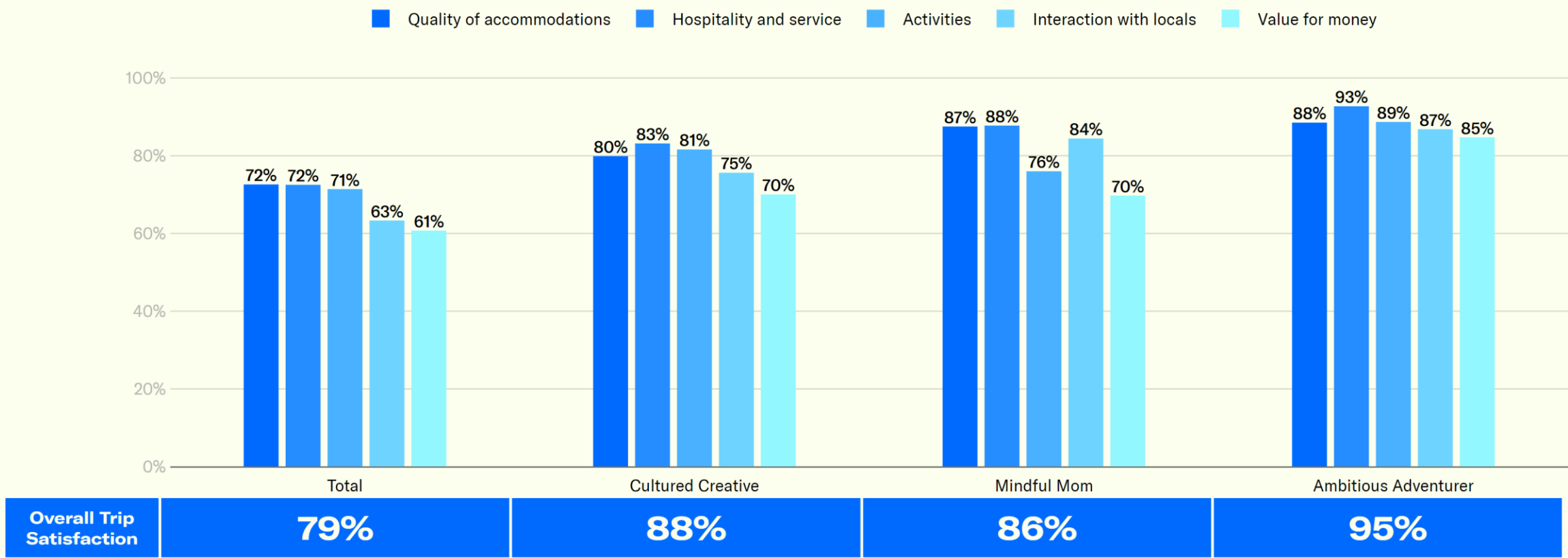
Question: Of the activities you participated in on your last trip, were any your primary motivation for visiting the Reno Tahoe region?

Base: Total visitors. 548 completed surveys.

Ambitious Adventurers are almost universally satisfied with their Reno Tahoe trips, Mindful Moms relatively less

95% of Reno Tahoe visitors who fit the Ambitious Adventurer profile highly rate their overall satisfaction with their Reno Tahoe trip. In comparison, 86% of Mindful Moms rate their trip satisfaction highly. Mindful Moms engage in fewer activities during their trip; the top activity Mindful Moms did on their trips was shopping, compared to visiting Lake Tahoe for the other segments.

Trip Satisfaction by Target Segments
(Top 3 Box Satisfaction - % rating "8", "9" or "10 - Extremely satisfied")



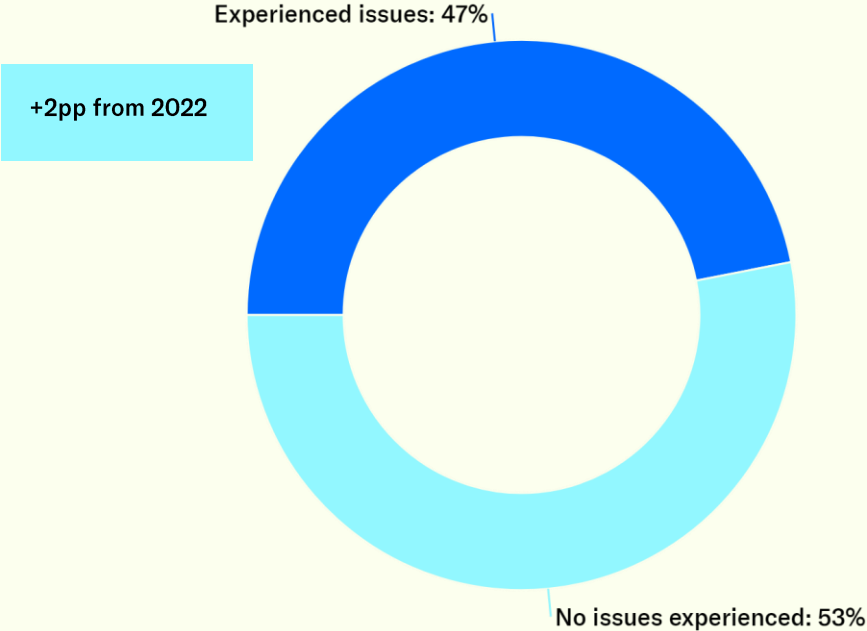
Question: Of the activities you participated in on your last trip, were any your primary motivation for visiting the Reno Tahoe region?

Base: Total visitors. 548 completed surveys.

Nearly half of visitors report experiencing an in-destination issue on their trip

Those that stayed in casino hotels were likelier to experience in-destination issues (57%, +9pp); vacation rental visitors were the least likely.

Experienced In-Destination Issues



Detail by Lodging Type

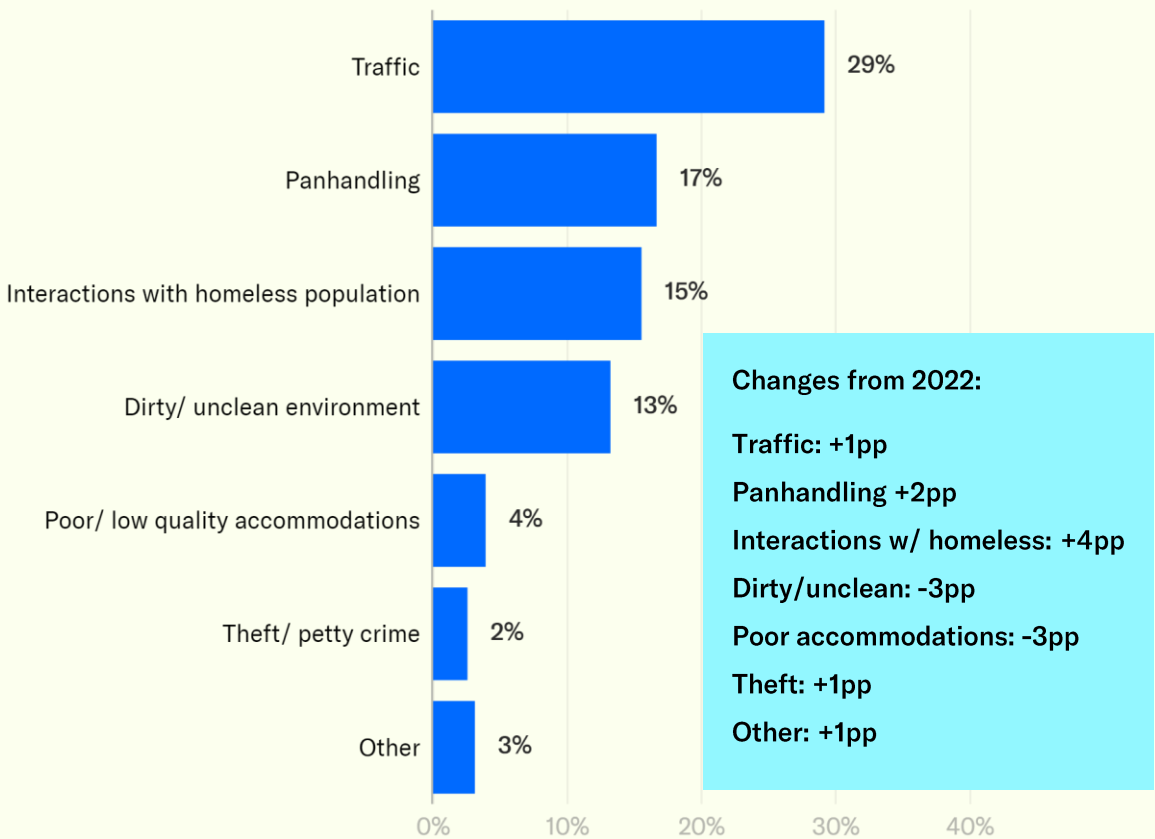
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Experienced in-destination issues	47%	57%	44%	42%	49%
Did not experience in-destination issues	53%	43%	56%	58%	51%
Base	548	247	174	135	59

Question: Did you experience any of the following on your most recent trip to the Reno Tahoe region? Select all that apply.
Base: Total visitors, 548 completed surveys.

Traffic, followed by panhandling and homeless, are the top issues visitors experience on their trips

There is also some experience with unclean environments, low quality accommodations and theft.

In-Destination Issues Experienced by Visitors



Detail by Lodging Type

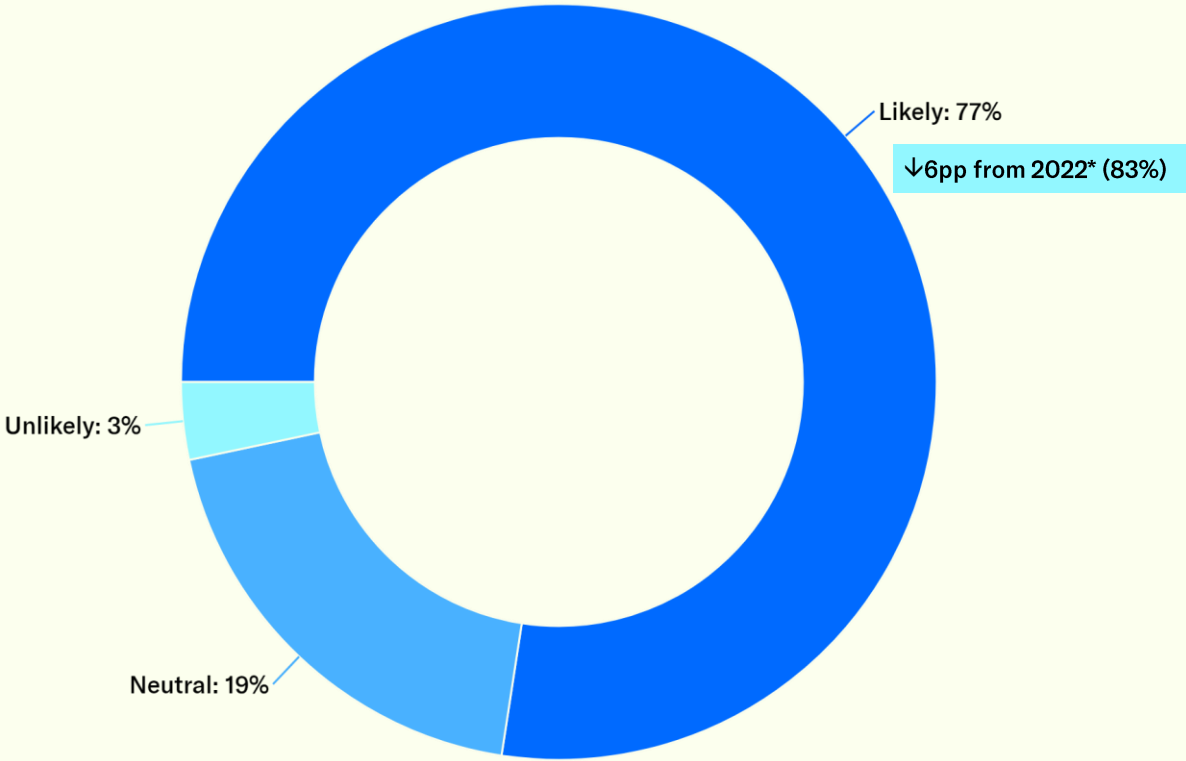
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Traffic	29%	34%	20%	27%	30%
Panhandling	17%	22%	13%	12%	18%
Interactions with homeless population	15%	21%	19%	19%	9%
Dirty/ unclean environment	13%	18%	16%	6%	16%
Poor/ low quality accommodations	4%	8%	3%	6%	0%
Theft/ petty crime	2%	4%	6%	2%	0%
Other	3%	3%	3%	0%	0%
Base	548	247	174	135	59

Question: Did you experience any of the following on your most recent trip to the Reno Tahoe region? Select all that apply.
Base: Total visitors.548 completed surveys.

Nearly 80% of leisure visitors are likely to return to Reno Tahoe

While business and event visitors are less sure of their return to the area, 79% of leisure visitors and 85% of VFRs say they are likely to come back to Reno Tahoe.

Likelihood to Return



Detail by Trip Purpose

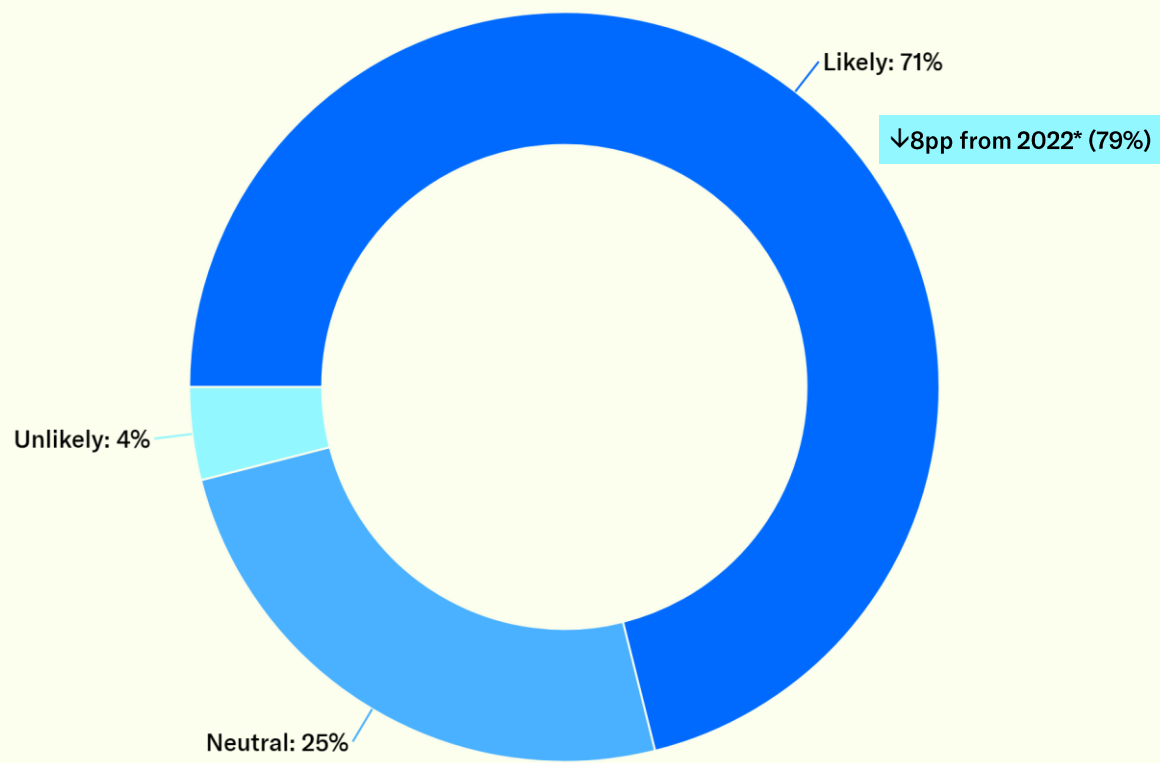
	Total	Leisure	Visit Friends/Relativ	Business	Event/Festival
Likely	77%	79%	85%	64%	39%
Neutral	19%	19%	11%	29%	39%
Unlikely	3%	2%	4%	6%	21%
Base	548	406	64	37	23

Question: How likely are you to return to the Reno Tahoe region in the future?
Base: Total visitors. 548 completed surveys.

More than 70% of visitors are likely to recommend Reno Tahoe to others

In total, 71% of visitors said they are likely to recommend the Reno Tahoe region to friends and/or family. Fully three-quarters of leisure visitors say they will recommend Reno Tahoe. Other visitor types are relatively less likely to.

Likelihood to Recommend



Detail by Trip Purpose

	Total	Leisure	Visit Friends/Relativ	Business	Event/Festival
Likely	71%	75%	67%	61%	36%
Neutral	25%	23%	27%	31%	40%
Unlikely	4%	2%	6%	8%	24%
Base	548	406	64	37	23

Question: How likely are you to recommend the Reno Tahoe region as a place to visit to friends/family?
Base: Total visitors. 548 completed surveys.

Visitor Perceptions of Reno Tahoe

This section presents findings on Reno Tahoe visitors' assessment of the Reno Tahoe destination brand based on their experiences.

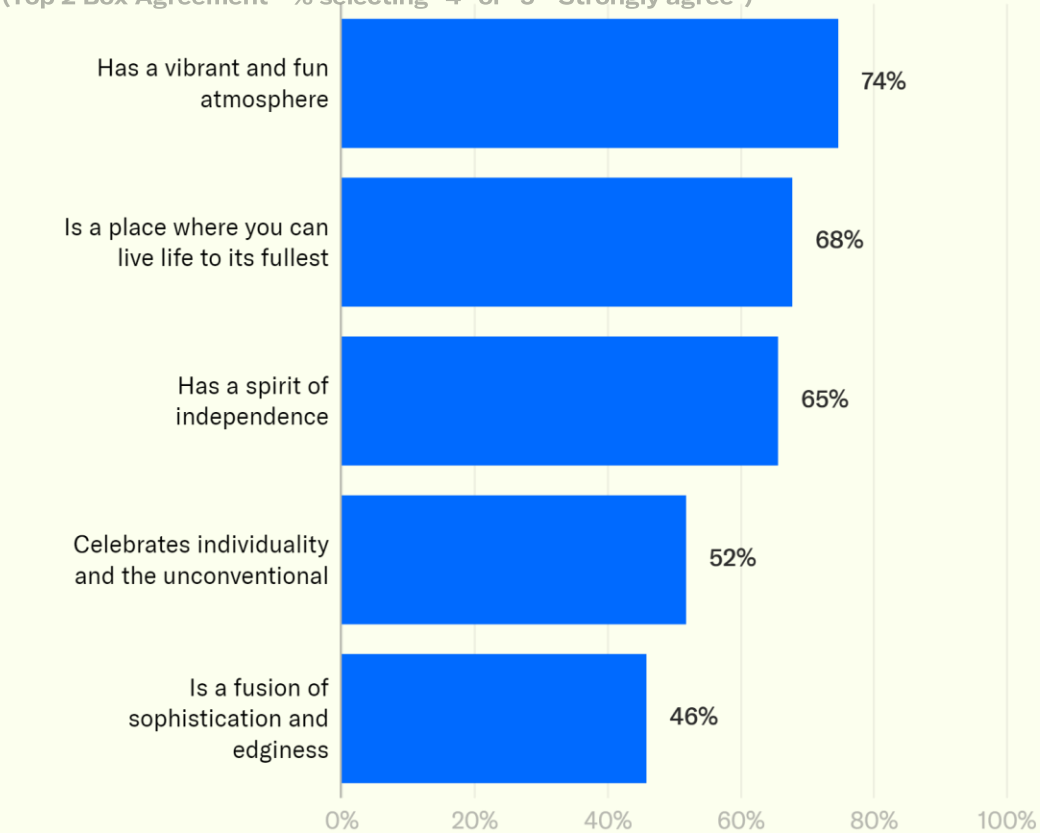


Visitors most agree that Reno Tahoe has a vibrant and fun atmosphere; agree least that it is a fusion of sophistication and edginess

Five statements on the Reno Tahoe brand were presented to visitors, who rated their agreement with them on a five-point scale. Nearly three quarters of visitors agreed or strongly agreed that Reno Tahoe has a vibrant and fun atmosphere, while about two-thirds agreed it is a place where you can live life to the fullest and has a spirit of independence. Over half agree Reno Tahoe celebrates individuality and the unconventional. However, just 46% agree it is a fusion of sophistication and edginess. VFR visitors are the least likely to agree with the brand statements overall.

Brand Descriptor Ratings

(Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")



Detail by Advertising Awareness

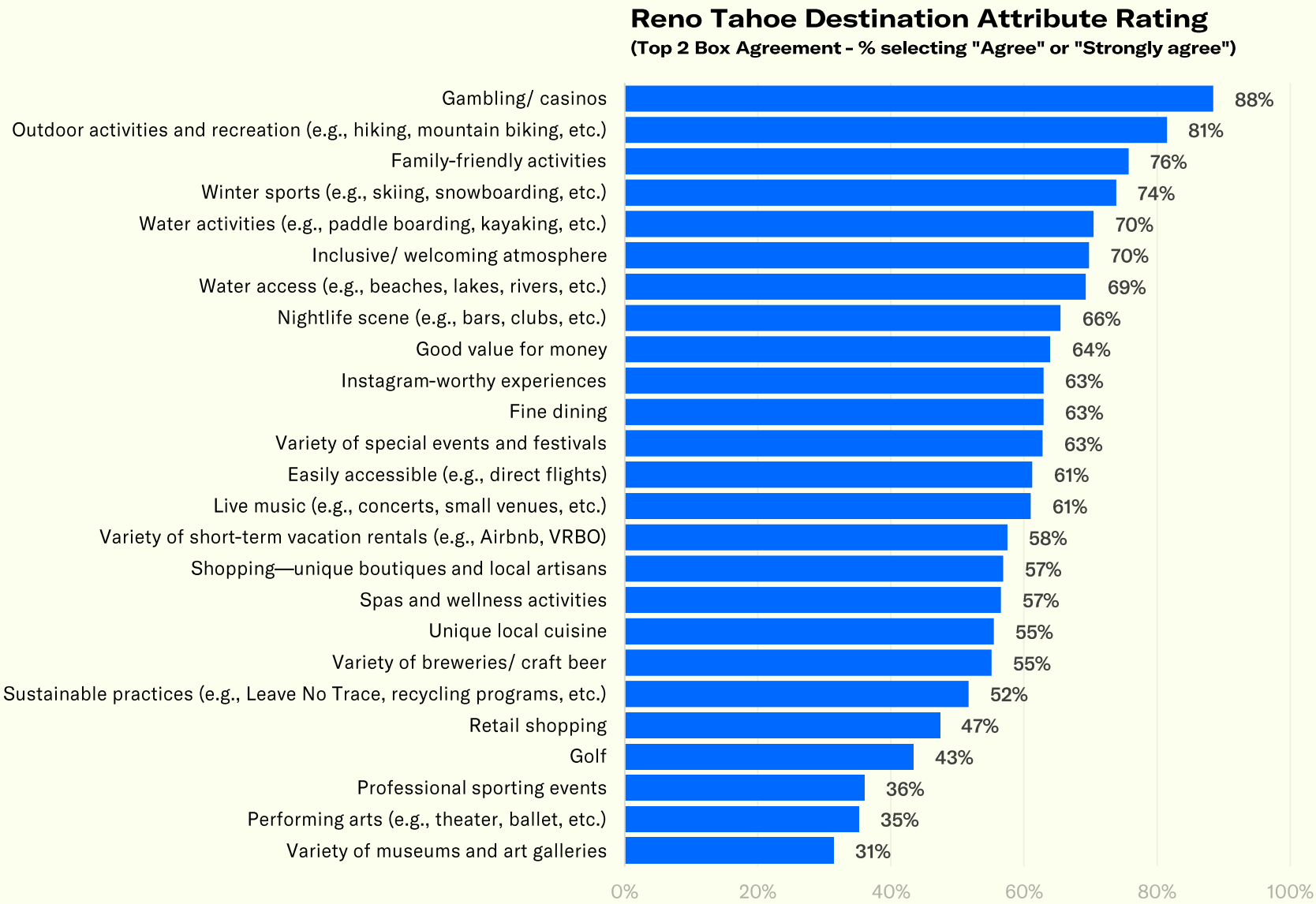
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Has a vibrant and fun atmosphere	74%	75%	74%	80%	74%
Is a place where you can live life to its fullest	68%	69%	68%	82%	69%
Has a spirit of independence	65%	68%	71%	78%	69%
Celebrates individuality and the unconventional	52%	54%	52%	72%	58%
Is a fusion of sophistication and edginess	46%	49%	56%	69%	31%
Base	548	247	174	135	59

Question: For each option below, please select how much you agree or disagree that it describes Reno Tahoe, whether you have been before or not.

Base: Total respondents. 548 completed surveys.

Reno Tahoe is rated highest by its visitors for its gaming, outdoor recreation, family-friendly activities, winter sports and water activities

Survey respondents were asked how much they agreed Reno Tahoe delivered on certain destination attributes. The chart at right shows the percent of Reno Tahoe visitors who agree Reno Tahoe. The majority of visitors rate the destination highly for nearly all attributes tested. Note however that variety of museums and art galleries, performing arts, professional sporting events, golf and retail shopping all under perform other attributes. In addition, despite shopping, spas and microbreweries being among the most common trip activities, these destination attributes are not amongst the most highly rated by visitors.

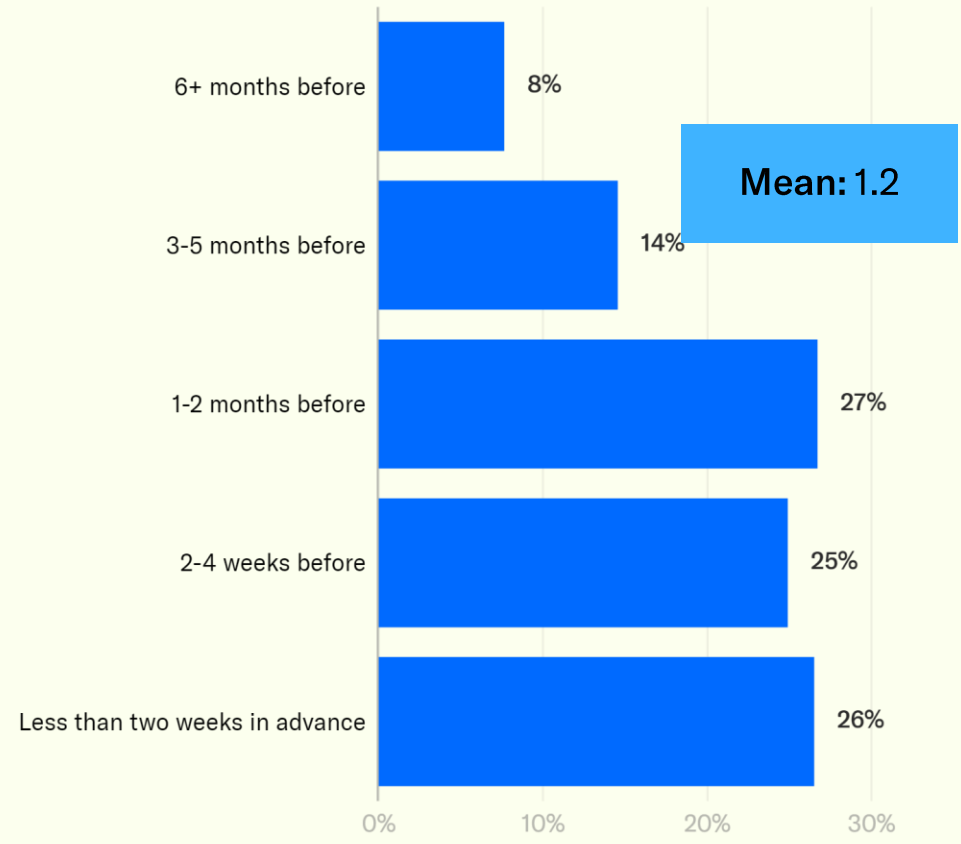


Travel Planning

Reno Tahoe visitors begin planning their trips 1.2 months out on average

When asked how far in advance they began planning their trips, the typical visitor reported 1.2 months in advance, with the vast majority under 2 months. Leisure and business travelers can be more spontaneous relative to VFR and event visitors.

Planning Window



Detail by Trip Type

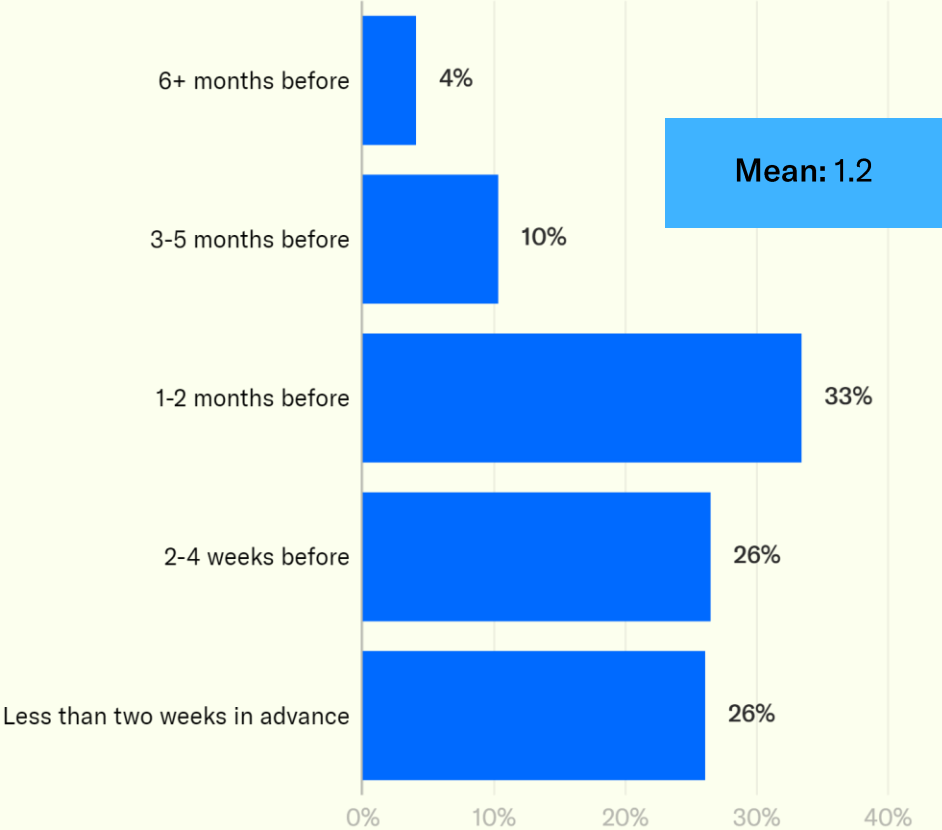
	Total	Leisure	Visit Friends/Relativ	Business	Event/Festival
6+ months before	8%	5%	14%	3%	8%
3-5 months before	14%	16%	10%	18%	9%
1-2 months before	27%	28%	25%	17%	41%
2-4 weeks before	25%	24%	39%	27%	26%
Less than two weeks in advance	26%	27%	11%	35%	16%
Mean (Months)	1.2	1.2	1.2	1.1	1.2
Base	507	379	59	34	20

Question: How far in advance did you begin planning and booking your last trip to Reno Tahoe?
Base: Total visitors. 461 completed surveys.

Reno Tahoe visitors tend to begin booking at the start of their trip planning process

Reno Tahoe visitors report they made bookings for their trip 1.2 months prior to arrival—a similar window to when they began planning their trip.

Booking Window



Detail by Trip Type

	Total	Leisure	Visit Friends/Relativ	Business	Event/Festival
6+ months before	4%	3%	8%	0%	3%
3-5 months before	10%	9%	11%	19%	15%
1-2 months before	33%	34%	19%	35%	48%
2-4 weeks before	26%	25%	45%	25%	21%
Less than two weeks in advance	26%	29%	16%	21%	13%
Mean (Months)	1.2	1.2	1.2	1.1	1.2
Base	507	379	59	34	20

Question: How far in advance did you begin planning and booking your last trip to Reno Tahoe?
Base: Total visitors, 461 completed surveys.



Further Insights

See the Visit Reno Tahoe Destination Research Dashboard for further insights into visitors, brand performance, advertising performance, and resident sentiment.

We're a creative insights firm shaping strategies that capture hearts, minds, and *market share*.

Future Partners