

RENO TAHOE

NEVADA TERRITORY VISITOR FACTS
2018 –2022



JULY 2023

NEVADA COMMISSION ON TOURISM

GOVERNOR

Joe Lombardo

LT. GOVERNOR • CHAIR

Stavros Anthony

DIRECTOR

Brenda Scolari

RESEARCH AND ANALYSIS

Kyle Shulz

Data Source: TNS Travels America / TravelTrak America

CONTACT

401 North Carson Street

Carson City, NV 89701

775.687.4322 | Fax 775.687.6779

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METHODOLOGY OVERVIEW

The 2022 Nevada Visitor Profile and Territory Profiles were compiled using data collected from the Travel Nevada Domestic Visitor Profile Survey administered monthly to qualified respondents.

Respondents are deemed qualified based on their responses to Omnitrak's monthly national TravelTrak America survey. Omnitrak has partnered with a single U.S. based managed panel provider to administer the monthly TravelTrakAmerica survey, as well as the follow-up Travel Nevada Visitor Profile Survey.

SURVEY QUALIFICATIONS

Each month, TravelTrakAmerica survey invitations are sent to a nationally representative sample of U.S. households based on the most recent U.S. census data for region, state, age, and household income.

Respondents are initially asked a series of questions (e.g., demographics, perceptions, past year travel, etc.) to determine whether they are a non-traveler or traveler. "Travelers" are defined as having taken one or more trips more than 50 miles from home (each way, excluding commuters) during the past 12 months.

Each month more than 9,000 respondents qualify as U.S. travelers. A wide variety of information (e.g., travel motivations, travel intent, vacation availability, trip timing, etc.) is collected from these travelers. Additional detailed information about trips taken during the past month is collected from approximately 4,000 travelers who took at least one trip in the prior month.

To qualify for the Travel Nevada monthly survey, respondents must have taken a leisure trip to or within Nevada during the previous month. Qualified respondents who took more than one Nevada leisure trip in the month prior are instructed to provide information about their most recent Nevada leisure trip.

WEIGHTING

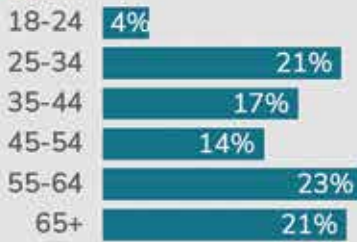
Respondents are assigned a weight based on their demographic representation among the U.S. population. The demographic weight is based on all panelists responding to the qualification questions (i.e., travelers and non-travelers).

When the demo weight is applied, results generated reflect all travel by a demographically representative sample of the U.S. population. Applying the demo weight generates results weighted to ensure the respondent sample is demographically representative of the U.S. population.

NEVADA TERRITORY QUALIFICATIONS

To ensure the survey captures all Nevada destinations visited to the best of its ability, respondents are deemed a territory visitor based on their responses to questions asking what city they visited, events attended, and specific locations/attractions visited. If a respondent answers that they have been to a county, city, area, and/or participated in an event within a territory, then they are marked as a visitor to that territory.

Age



Annual Household Income



Ethnicity



Day Trips



VISITOR SNAPSHOT

Top Origin Markets



Top Primary Purposes of Nevada Trip

- 1 Visit friends and/or relatives – 23%
- 2 Vacation – 20%
- 3 Gaming – 10%
- 4 Entertainment – 10%
- 5 Outdoor recreation – 5%

Top Travel Modes to Nevada



Average Nevada Trip Rating



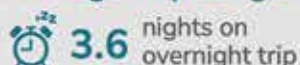
Advance Decision for Nevada Trip



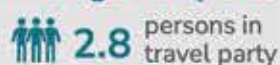
Average Likelihood to Return



Average Trip Length



Average Party Size



Average Nevada Trip Spend



Notes: percentages have been rounded; for detailed figures, see tables in following pages.
Sample size (n=271)

| QUESTION | | 2022 | 2021 | 2020 | 2019 | 2018 |
|----------|---|--------|--------|--------|--------|-------|
| 1) | What is the average non-gaming & gaming trip expenditure per overnight visitor? | \$661 | \$561 | \$449 | \$544 | \$522 |
| 2) | What is the average non-gaming & gaming <u>daily</u> expenditure per overnight visitor? | \$164* | \$143* | \$130* | \$155* | \$158 |
| 3) | What is the average travel party size? | 2.8 | 2.7 | 2.9 | 2.9 | 2.6 |
| 4) | What is the average length (nights) per overnight trip? | 3.6 | 3.5 | 3.5 | 3.4 | 4.2 |
| 5) | What percentage of visits were day trips? | 20.7% | 20.8% | 29.8% | 24.8% | 19.5% |
| 6) | What is the average rating of trip to Nevada - scale of 1 to 5? | 4.2 | 4.2 | 4.2 | 4.3 | 4.2 |
| 7) | What is the likelihood of returning to Nevada within the next two years - scale of 1 to 5? | 4.2 | 4.2 | 4.4 | 4.3 | N/A |
| 8) | What is the breakdown of advanced planning to make the decision to take a trip to this destination? | | | | | |
| | Same day | 5.2% | 9.1% | 13.2% | 3.8% | 5.4% |
| | 2-6 days | 16.5% | 20.5% | 28.9% | 16.6% | 20.5% |
| | 1-3 weeks | 25.7% | 29.5% | 21.0% | 28.0% | 23.6% |
| | 1-3 months | 34.0% | 24.1% | 21.5% | 31.6% | 29.1% |
| | 4-6 months | 10.8% | 8.0% | 8.4% | 11.5% | 10.5% |
| | More than 6 months | 7.8% | 8.7% | 7.1% | 8.5% | 10.9% |
| 9) | What was the primary source used to <u>inspire</u> travel to the destination? | | | | | |
| | Other Source | 20.3% | 21.5% | 14.0% | N/A | N/A |
| | Own Experience in Nevada | 19.8% | 24.2% | 20.2% | N/A | N/A |
| | Friends/Relatives/Other Word of Mouth | 19.1% | 14.2% | 15.6% | N/A | N/A |
| | Hotel Website | 12.6% | 6.5% | 7.4% | N/A | N/A |
| | Search Engine | 4.8% | 7.6% | 6.4% | N/A | N/A |
| 10) | What was the primary source used to <u>plan</u> travel to the destination? | | | | | |
| | Other Source | 22.3% | 21.1% | 16.6% | N/A | N/A |
| | Friends/Relatives/Other Word of Mouth | 15.8% | 14.7% | 11.3% | N/A | N/A |
| | Own Experience in Nevada | 15.6% | 21.4% | 21.4% | N/A | N/A |
| | Hotel Website | 14.3% | 11.4% | 7.6% | N/A | N/A |
| | Search Engine | 8.9% | 4.6% | 5.1% | N/A | N/A |

11) What was the primary source used to book travel to the destination?

| | | | | | |
|--|-------|-------|-------|-----|-----|
| Other Source | 20.3% | 23.1% | 20.8% | N/A | N/A |
| Own Experience in Nevada | 17.1% | 17.4% | 13.4% | N/A | N/A |
| Hotel Website | 16.3% | 19.3% | 12.2% | N/A | N/A |
| Friends/Relatives/Other Word of Mouth | 11.6% | 8.9% | 10.0% | N/A | N/A |
| Online Travel Agent (i.e. Expedia, Orbitz, etc.) | 9.0% | 9.9% | 7.5% | N/A | N/A |

12) What are the top Nevada activities and attractions experienced (entire trip)?

| | | | | | |
|---|-------|-------|-------|-------|-------|
| Dining and Restaurants | 54.1% | 48.1% | 36.3% | 34.3% | 32.9% |
| Casino-Resorts | 47.5% | 51.3% | 34.6% | 50.6% | 41.5% |
| Gaming, General | 26.1% | 26.7% | 28.2% | 20.6% | 19.2% |
| Road Trip/Scenic Drive | 25.0% | 20.6% | 18.2% | N/A | N/A |
| Visit Friends/Relatives | 22.5% | 14.1% | 14.3% | 12.6% | 12.5% |
| Family/Friends Event/Reunion | 21.9% | 20.3% | 25.9% | 12.1% | 9.6% |
| Lakes/Reservoirs | 21.7% | 16.5% | 22.1% | 9.5% | 13.4% |
| Shopping Malls & Outlets | 21.5% | 18.0% | 24.1% | N/A | N/A |
| Parks/Recreation Areas: National or State | 17.8% | 14.4% | 13.9% | 11.0% | 12.5% |
| Landscape/Open Space | 17.0% | 13.3% | 16.5% | N/A | N/A |

13) What is the likelihood of recommending Nevada as a vacation destination to friends/family?

| | | | | | |
|-------------------|-------|-------|-------|-------|-----|
| Not At All Likely | 3.0% | 2.4% | 0.7% | 0.7% | N/A |
| Not Very Likely | 5.3% | 3.1% | 7.2% | 4.9% | N/A |
| Somewhat Likely | 19.2% | 25.1% | 17.4% | 16.6% | N/A |
| Very Likely | 28.1% | 31.2% | 26.1% | 29.8% | N/A |
| Extremely Likely | 44.3% | 38.2% | 48.5% | 48.0% | N/A |

14) What are the top five primary purposes for the trip to Nevada?

| | | | | | |
|----------------------------|-------|-------|-------|-------|-------|
| Visit Friends or Relatives | 23.4% | 22.7% | 27.8% | 32.5% | 27.2% |
| Vacation | 20.3% | 20.7% | 30.7% | 19.0% | 23.6% |
| Gaming | 10.5% | 11.8% | 11.6% | 14.4% | 12.8% |
| Entertainment | 10.1% | 7.2% | 5.6% | 8.2% | 7.0% |
| Outdoor Recreation | 5.3% | 7.6% | 4.1% | 8.7% | 6.7% |

15) What are the top five metropolitan areas of origin?

| | | | | | |
|--------------------------------|-------|-------|-------|-------|-------|
| San Francisco–Oakland–San Jose | 18.1% | 14.1% | 13.2% | 17.0% | 11.8% |
| Sacramento–Stockton–Modesto | 17.0% | 16.0% | 17.7% | 16.1% | 15.3% |
| Los Angeles | 12.8% | 18.5% | 16.9% | 15.3% | 13.4% |
| Reno | 6.8% | 8.9% | 4.3% | 8.4% | 8.6% |
| Phoenix (Prescott) | 4.7% | 0.9% | 1.0% | 1.3% | 2.9% |

16) Where are the top five places visitors are staying (entire trip)?

| | | | | | |
|--------------------------------|-------|-------|-------|-------|-------|
| Casino Hotel/Motel | 43.7% | 56.8% | 40.9% | 50.5% | 53.0% |
| Friends or Relatives Residence | 26.5% | 9.5% | 20.1% | 20.3% | 14.8% |
| Non-Casino Hotel/Motel | 8.7% | 12.4% | 10.0% | 13.3% | 17.3% |
| Condo/Time Share | 7.3% | 3.2% | 7.0% | 5.3% | 9.5% |
| Sharing Economy | 7.0% | 1.5% | 4.6% | 3.8% | N/A |

17) What is the annual household income breakdown of visitors?

| | | | | | |
|-----------------------|-------|-------|-------|-------|-----|
| Under \$50,000 | 23.6% | 20.1% | 20.1% | 19.6% | N/A |
| \$50,000 - \$74,999 | 21.7% | 27.7% | 15.2% | 25.0% | N/A |
| \$75,000 - \$99,999 | 16.9% | 15.9% | 20.9% | 16.1% | N/A |
| \$100,000 - \$124,999 | 14.0% | 12.9% | 14.4% | 14.6% | N/A |
| \$125,000 - \$149,000 | 11.5% | 11.6% | 9.1% | 9.3% | N/A |
| \$150,000 or more | 12.4% | 11.9% | 20.2% | 15.5% | N/A |

18) What are the top five modes of travel to Nevada?

| | | | | | |
|---------------|-------|-------|-------|-----|-----|
| Personal Auto | 67.1% | 75.8% | 62.8% | N/A | N/A |
| Plane | 24.6% | 18.7% | 21.0% | N/A | N/A |
| Rental Auto | 14.1% | 8.9% | 14.9% | N/A | N/A |
| Train | 4.1% | 4.1% | 6.6% | N/A | N/A |
| Bus | 4.0% | 3.6% | 7.4% | N/A | N/A |

19) What are the top five modes of travel within Nevada?

| | | | | | |
|-----------------------------------|-------|-------|-------|-----|-----|
| Personal Auto | 66.8% | 74.1% | 69.8% | N/A | N/A |
| Rental Auto | 21.4% | 15.9% | 21.1% | N/A | N/A |
| Shared Economy (Uber, Lyft, etc.) | 8.6% | 10.9% | 3.3% | N/A | N/A |

| | | | | | |
|------|------|------|------|-----|-----|
| Bus | 7.0% | 5.7% | 7.5% | N/A | N/A |
| Taxi | 5.3% | 4.2% | 5.8% | N/A | N/A |

20) What is the ethnicity breakdown of visitors?

| | | | | | |
|-------------------------------|-------|-------|-------|-------|-------|
| Caucasian | 71.8% | 72.7% | 76.3% | 74.7% | 81.2% |
| Hispanic | 16.8% | 19.3% | 11.6% | 12.2% | 11.5% |
| Asian/Pacific Islander | 14.6% | 11.5% | 14.4% | 13.7% | 9.9% |
| African American | 6.0% | 5.0% | 2.3% | 5.2% | 3.8% |
| Other | 4.6% | 8.0% | 4.7% | 3.3% | 3.5% |
| American Indian, Aleut Eskimo | 1.1% | 1.5% | 1.5% | 2.3% | 1.3% |
| No Answer | 0.0% | 1.3% | 0.0% | 2.3% | 0.3% |

21) What is the age breakdown of visitors?

| | | | | | |
|-------|-------|-------|-------|-------|-------|
| 18-24 | 4.1% | 9.2% | 4.1% | 7.8% | 7.4% |
| 25-34 | 20.8% | 23.5% | 25.5% | 27.4% | 22.0% |
| 35-44 | 17.1% | 14.8% | 28.8% | 21.1% | 14.4% |
| 45-54 | 14.1% | 14.3% | 11.2% | 14.2% | 16.3% |
| 55-64 | 22.7% | 19.9% | 17.7% | 12.6% | 20.5% |
| 65-74 | 19.9% | 16.5% | 10.4% | 13.6% | 17.3% |
| 75+ | 1.4% | 1.9% | 2.2% | 3.3% | 2.2% |

| | | | | | |
|---------------------|------------|------------|------------|------------|------------|
| Sample Size: | 271 | 309 | 175 | 355 | 313 |
|---------------------|------------|------------|------------|------------|------------|

**Figures for 2019-2022 reflect overnight visitor spend per person per day, where the number of nights stayed has been converted into days by adding .75 to the number of nights. For instance, a respondent who reported staying 3 nights would be converted into staying 3.75 days. Data from prior years does not use this conversion method resulting in larger daily spending estimates.*

O R E G O N

I D A H O

U T A H

C A L I F O R N I A

A R I Z O N A

Nevada's Territories

- COWBOY COUNTRY
- INDIAN TERRITORY (ENTIRE STATE)
- LAS VEGAS TERRITORY
- NEVADA SILVER TRAILS
- PONY EXPRESS TERRITORY
- RENO-TAHOE TERRITORY

