

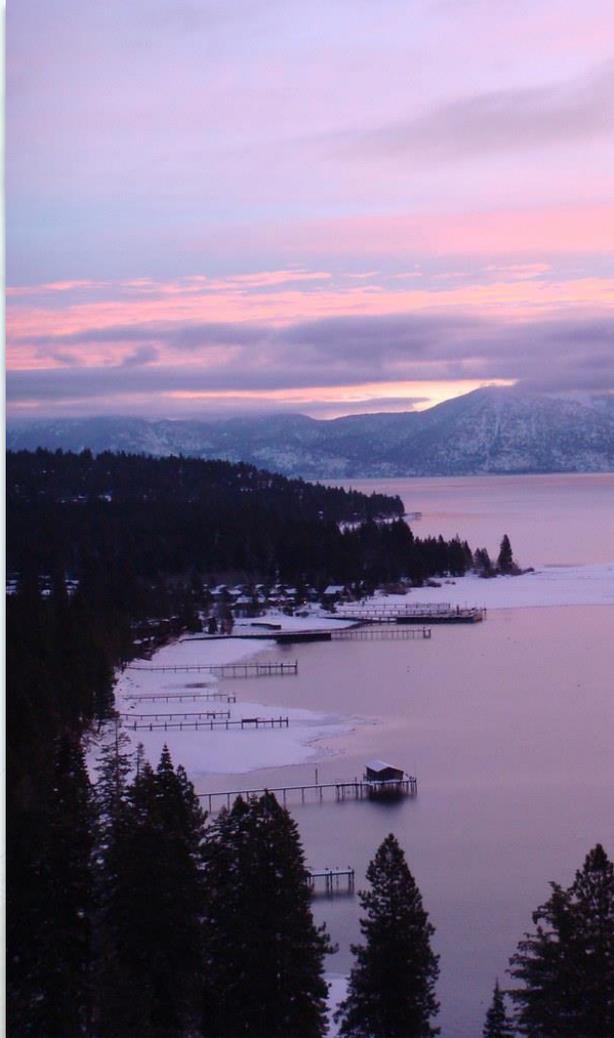


Domestic Visitor Profile

South Tahoe - Lake Tahoe Visitors Authority

*Tahoe
South*

Summary



Demographics

- Lake Tahoe attracts millennial travelers, with more than four-in-ten (41%) visitors to the area 25-39 years old.
- More adult centric, the majority of Lake Tahoe's visitors do not have children under age 18 living in their household (61%); and more than one-fifth (22%) of those with children under 18 in their household, traveled to the area without their children.
- Travelers visiting Lake Tahoe tend to have a greater household income than overall U.S. domestic visitors, with 39% of Lake Tahoe's visitors reporting an income of \$100,000 or more, compared to 32% of U.S. visitors.
- Admired by a diverse set of travelers, Lake Tahoe attracts a more ethnically diverse set of visitors compared to the overall U.S. domestic travel market; Asians/Pacific Islanders are strongly represented making up 17% of visitors to the area.

Geographic Origin

- Proximity influences where visitors travel from and travel to. For Lake Tahoe, Western states represent two-thirds (66%) of its visitor volume, with California alone accounting for 54% of total volume to the area.

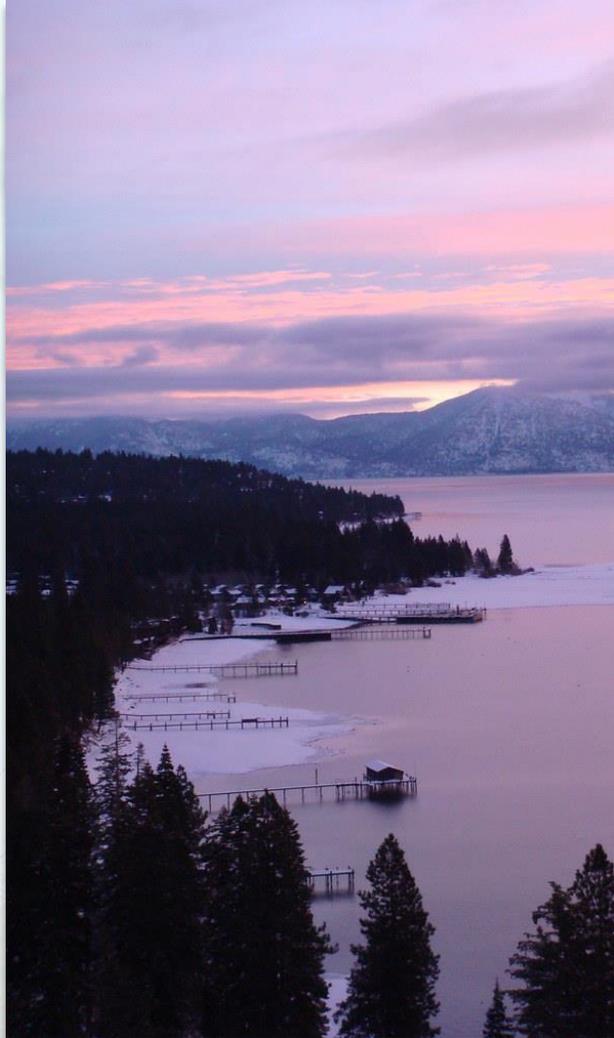
Visitor Type

- Majority of Lake Tahoe visitors choose to stay overnight (84%) to enjoy more of what the destination has to offer.
- Overnight visitors stay an average of 3.6 nights in the destination, taking advantage of Tahoe's vast offerings.

Visitor Behavior

- Most travelers choose to share the experiences Lake Tahoe offers with their significant other or spouse (62%).
- Travelers love visiting Tahoe time-after-time, with 72% of visitors having visited 3+ times before in the last five years

Summary



Travel Planning

- Lake Tahoe travelers plan their trips close to departure with one-third (32%) deciding to visit less than 2 weeks before their trip and 22% deciding 2-3 weeks out.
- Travelers to the area come prepared, with over two-thirds (69%) turning to offline sources and three in five (60%) leveraging online sources, when planning the perfect vacation; only 17% of visitors to the area make no plans before their trip.
- Travelers visiting Lake Tahoe, most often rely on advice from friends and relatives (32%) and their own experience (29%) for planning their trip.
- Other planning sources frequently used by Lake Tahoe visitors are search engines (27%), the destination website (19%), travel provider websites (14%), and social networks (14%).

Travel Characteristics

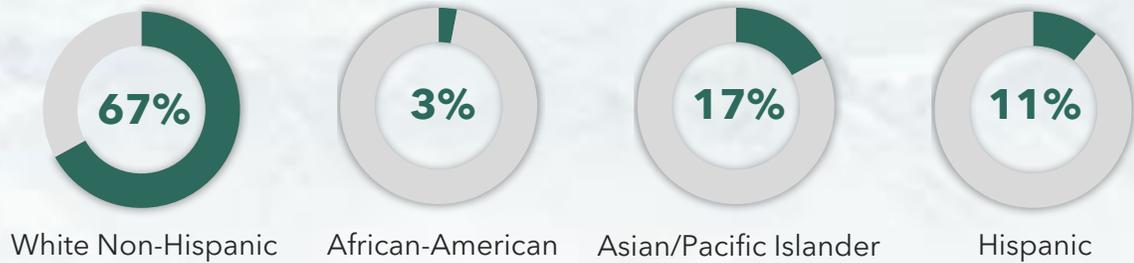
- Secluded in the Sierra Nevada's, 77% of travelers drive their own vehicle to Lake Tahoe, while 22% arrive by plane at nearby airports and then drive in.
- Travelers primarily visit Lake Tahoe to enjoy time with friends/relatives (31%), experience the outdoors (21%), and for entertainment and sightseeing opportunities (16%).
- Lake Tahoe visitors are willing to pay for a high-quality trip, spending \$2,169 on average during their travels.

Top Activities in Destination

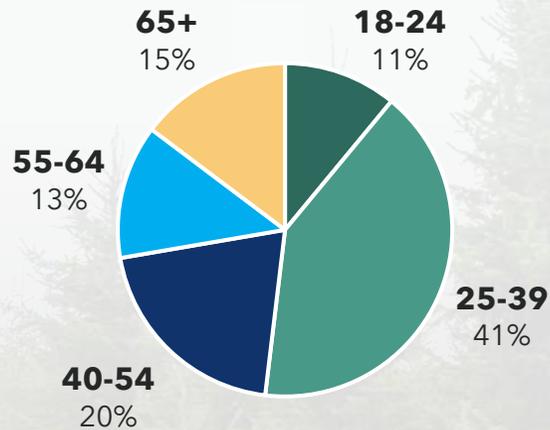
- Catering to a wide-range of travelers, Lake Tahoe visitors are most drawn to the area's entertainment, outdoor/nature, adventure, and art/culinary activities.
- Boasting a range of unique offerings, Lake Tahoe travelers enjoy the casinos and gaming, going to the beach, visiting loved ones, and unique historic sites the most

Demographics

Ethnicity of Lake Tahoe Visitors



Age of Lake Tahoe Visitors

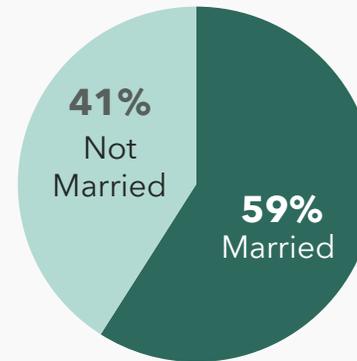


Average Age of Lake Tahoe Visitors

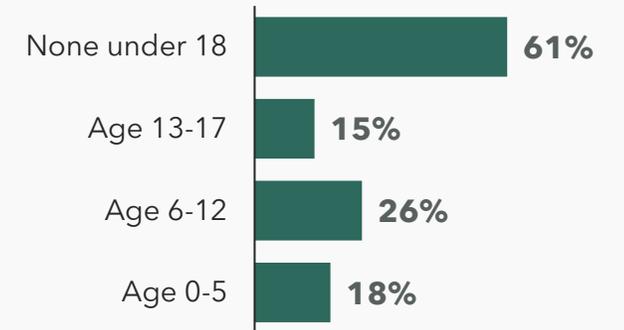
43.0
Years Old

Household Composition of Lake Tahoe Visitors

Marital Status



Children in Household



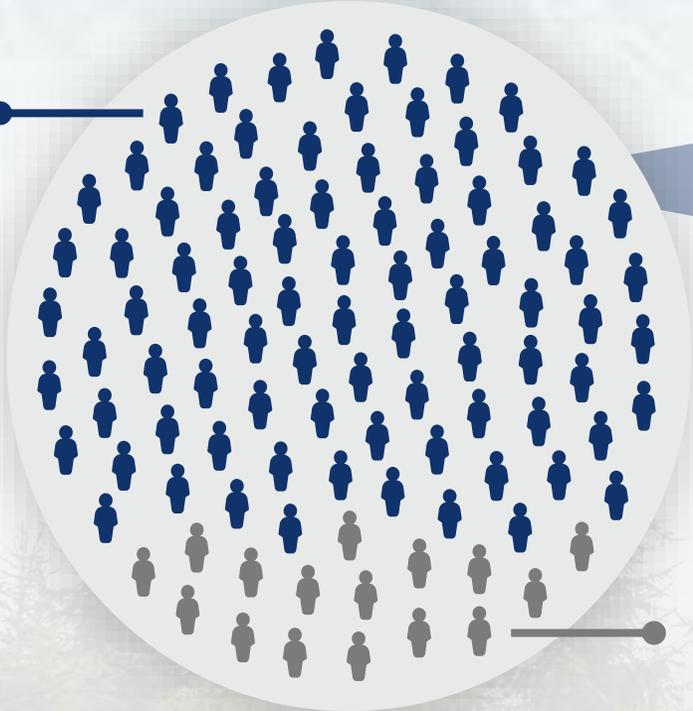
Household Income



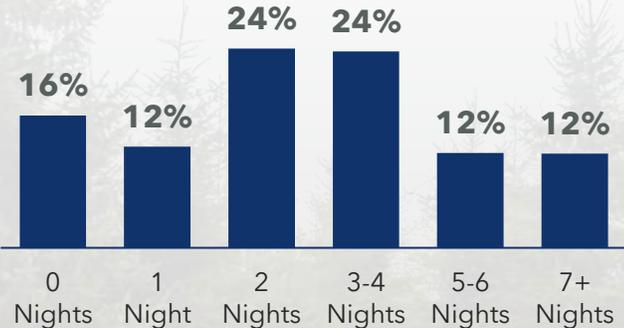
Visitor Type

Overnight travel is prominent in Lake Tahoe with over four-in-five (84%) staying for at least one night and almost half (48%) staying for three or more nights. More than half (60%) of Lake Tahoe overnight visitors originate from California while only 3% come from Nevada.

84%
Stayed
Overnight



16%
Day Visit



3.1
Average Incl 0

3.6
Average Excl 0

Visitor Behavior

Lake Tahoe travelers keep coming back for more, with 72% of visitors having visited three or more times in the last five years. In terms of future visits, leisure travel intent is strongest among travelers who live in the Western U.S., with 10% of Pacific travelers and 5% of Mountain travelers indicating a desire to visit

Travel Party Composition



	Spouse/significant other	62%
	Children	33%
	Other family members	20%
	Friend(s)	17%
	Alone	14%

TOTAL PARTY MEMBERS 3.3



30%
of household travel parties include a member(s) under the age of 18 years-old

13%

First Visit

14%

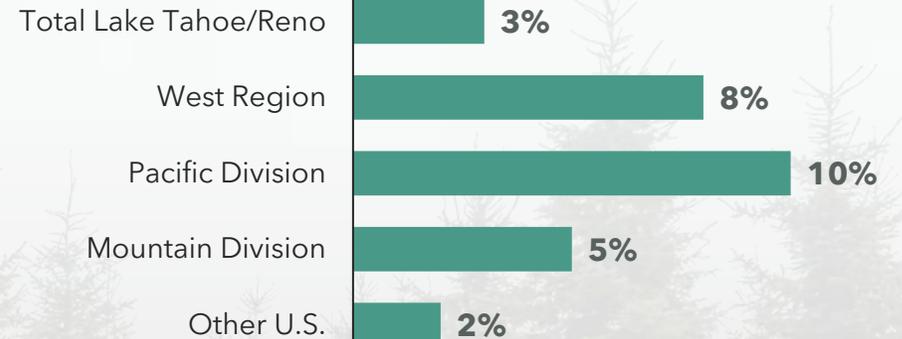
Visited 1-2 times

72%

Visited 3+ times

Repeat visitation measured as visits to Lake Tahoe over the past 5 years

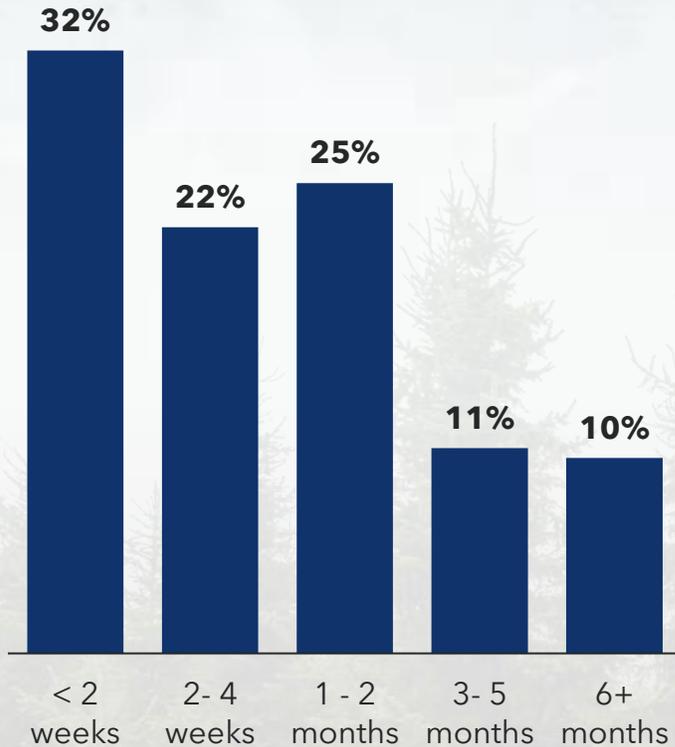
Leisure Travel Intent (Next 2 Years)



Travel Planning

Lake Tahoe travelers plan their trips close to departure with one-third (32%) deciding to visit less than 2 weeks before their trip. Visitors rely on a mix of online and offline planning sources including search engines, advice from friends/relatives, and the South Tahoe website.

Advance Decision to Visit



Offline Sources

69%

Online Sources

60%

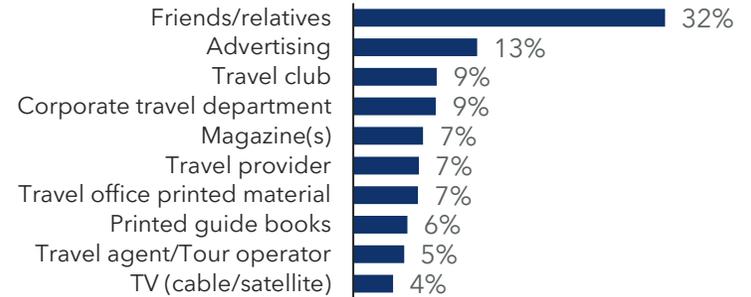
Own Experience

29%

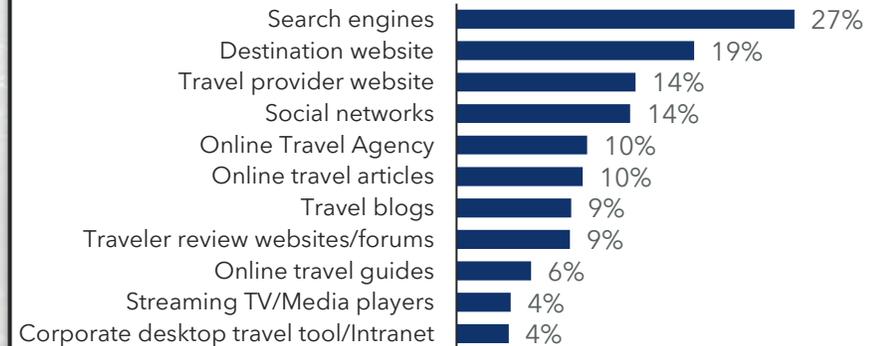
No Plans Made

17%

Offline Sources

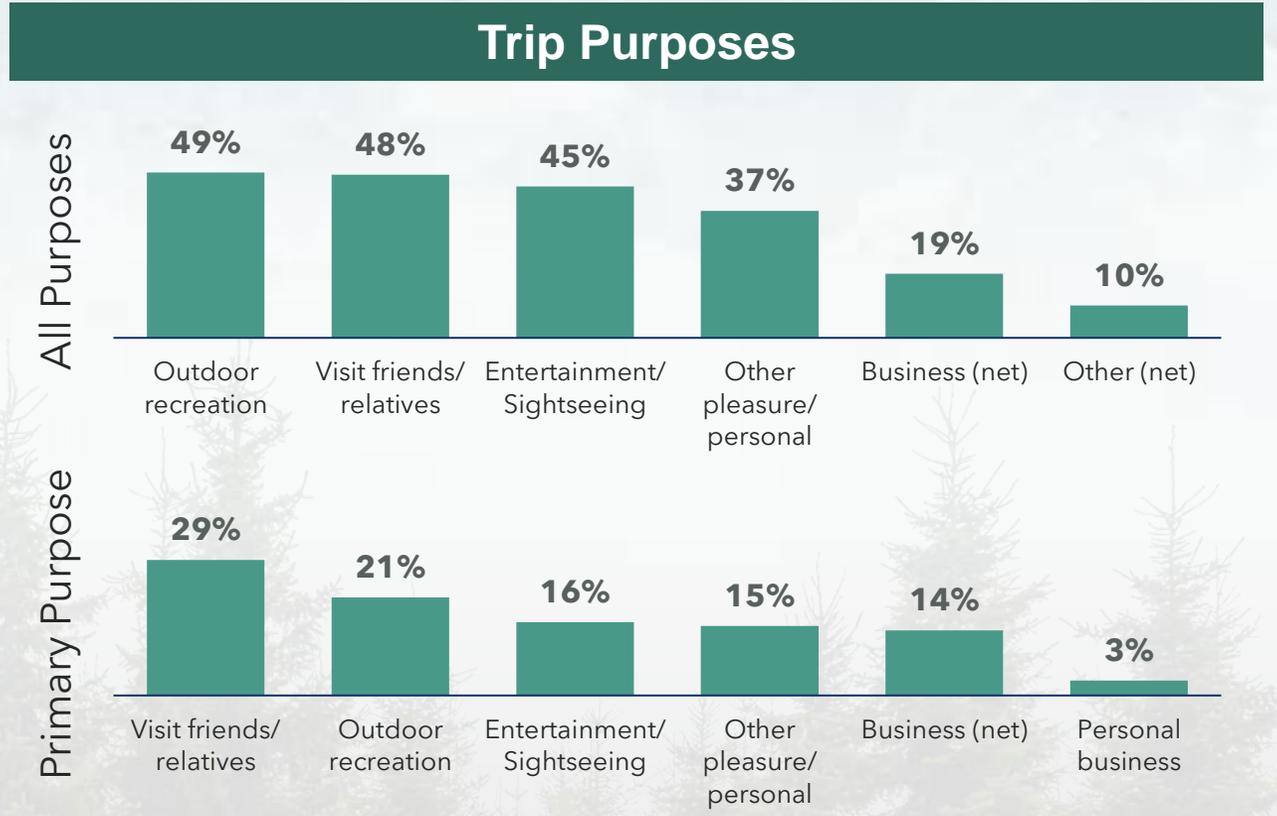
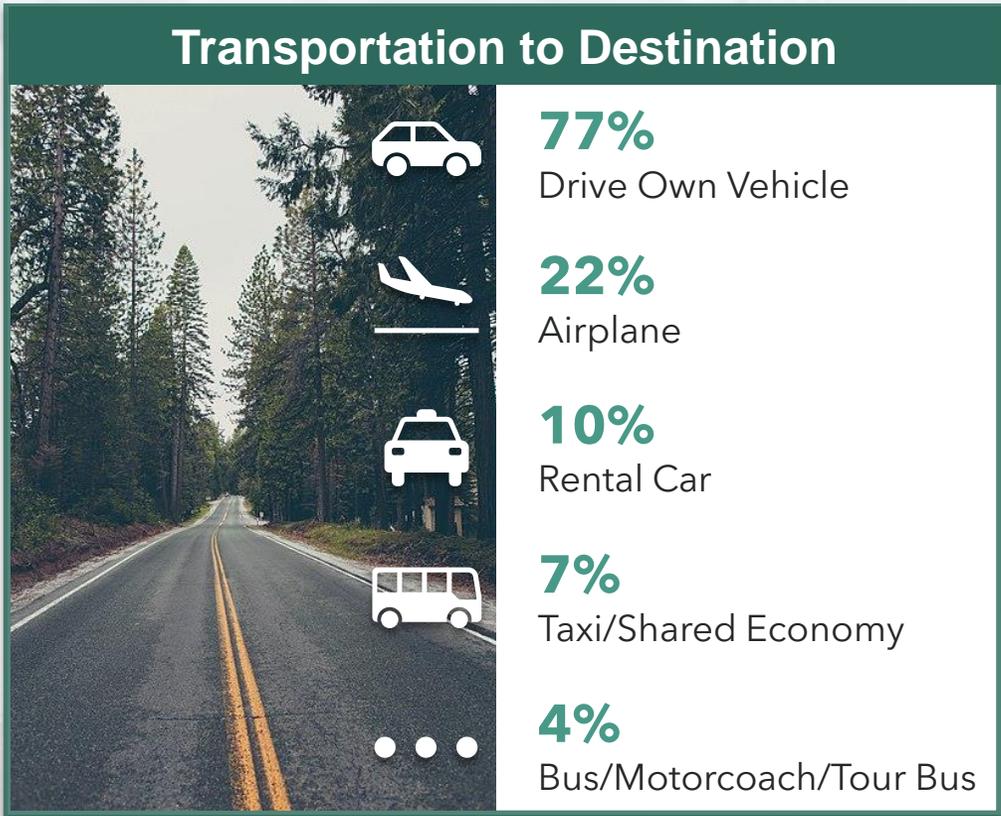


Online Sources

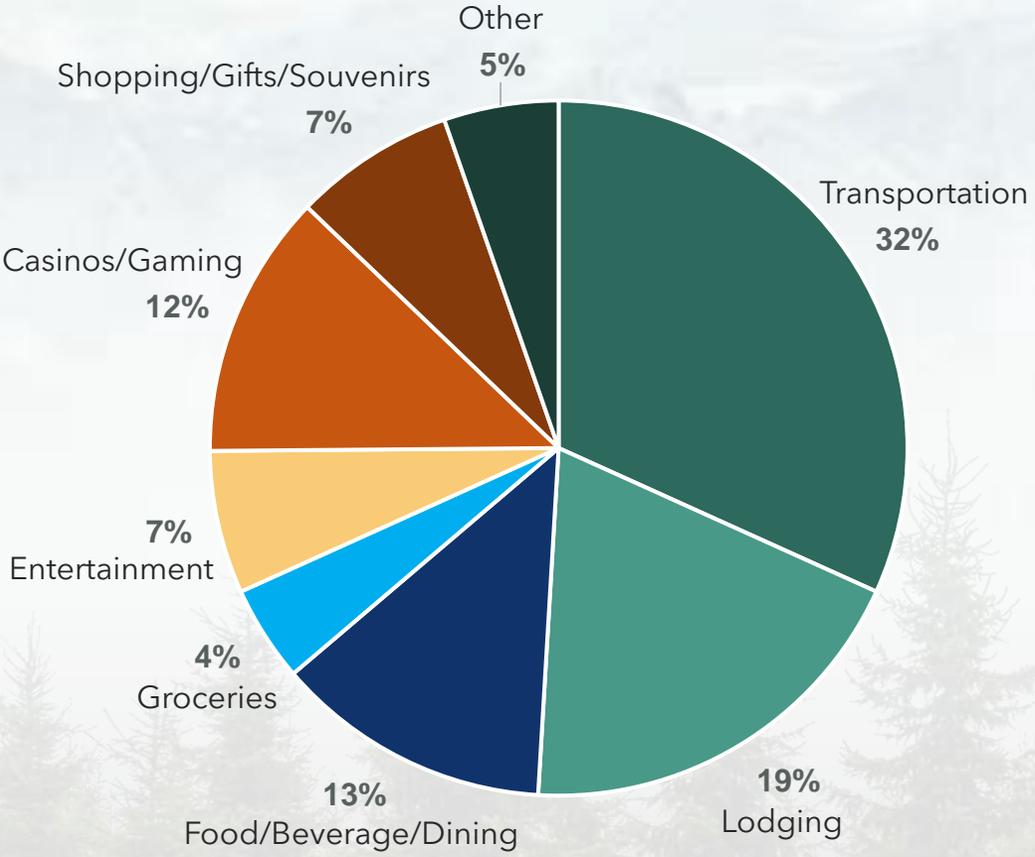


Travel Characteristics

Secluded in the Sierra Nevada mountains, 77% of travelers choose to drive their own vehicle to Lake Tahoe for their trip. Almost half of travelers indicate one of the reasons for visiting the area is to experience its abundant outdoor recreation opportunities and to enjoy time with friends/relatives.



Visitor Spend



On average, Lake Tahoe visitors spend \$2,139 on their trip to the area with transportation, lodging, casinos and gaming, and food and beverage spending representing the top categories of travel spend.

Total Spend



\$2,139
Trip Spend
(per Party per Trip)

Top Activities in Destination

Many Lake Tahoe travelers are drawn to the area’s entertainment and outdoor activities with casino/gaming, going to the beach, and visiting friends/relatives being top activities.

61%	52%	42%	40%	35%	30%	29%
Entertainment	Outdoors/Nature	Adventure	Arts & Culture	Family/Friends	Parks/Gardens	Sightseeing



	Casino/Gaming	32%
	Beach	31%
	Visiting Friends/Relatives	28%
	Historic Sites	25%
	Shopping	25%
	State/National Park/Monuments	25%
	Hiking/Backpacking/Canyoneering	24%

Methodology

TravelTrakAmerica Syndicated Research

TravelTrakAmerica is a comprehensive national travel study of U.S. households focusing on domestic travel. The syndicated study collects general information on travelers (e.g., demographics, perceptions, travel intent) and detailed information about past-month travel.



Methodology

Omnitrak sources survey respondents from a single managed panel provider to administer the monthly TravelTrakAmerica survey to a nationally representative sample of U.S. households.

Each month a variety of general information (e.g., demographics, perceptions, travel intent, etc.) is collected from more than 9,000 U.S. travelers. “Travelers” are defined as having taken one or more trip(s) more than 50 miles from home (each-way, excluding commuters) during the past 12 months.

Details about trips taken during the past-month are collected from approximately 4,000 travelers who took at least one trip in the prior month. To ensure the survey captures all destinations visited to the best of its ability, when asked where they went in a state, respondents are provided with an option to type in the destination they visited.

Thank you!

*Tahoe
South*

