



Reno Tahoe

Brand Health & Ad Effectiveness

Table of Contents

Research Overview & Objectives	<u>3</u>
About This Report	<u>5</u>
Executive Summary	<u>6</u>
Target Audience Profile	<u>13</u>
Detailed Findings on Brand Health	<u>21</u>
Travel Decision Motivators	<u>22</u>
Past & Planned Travel to Reno Tahoe	<u>26</u>
Perceptions of Reno Tahoe	<u>32</u>
Reno Tahoe's Competitive Position	<u>43</u>
Detailed Findings on Ad Effectiveness	<u>51</u>
Advertising Awareness	<u>52</u>
Direct Impact of Paid Advertising	<u>59</u>
Indirect Impact of Marketing	<u>64</u>
Appendix	<u>71</u>



Research Overview & Objectives

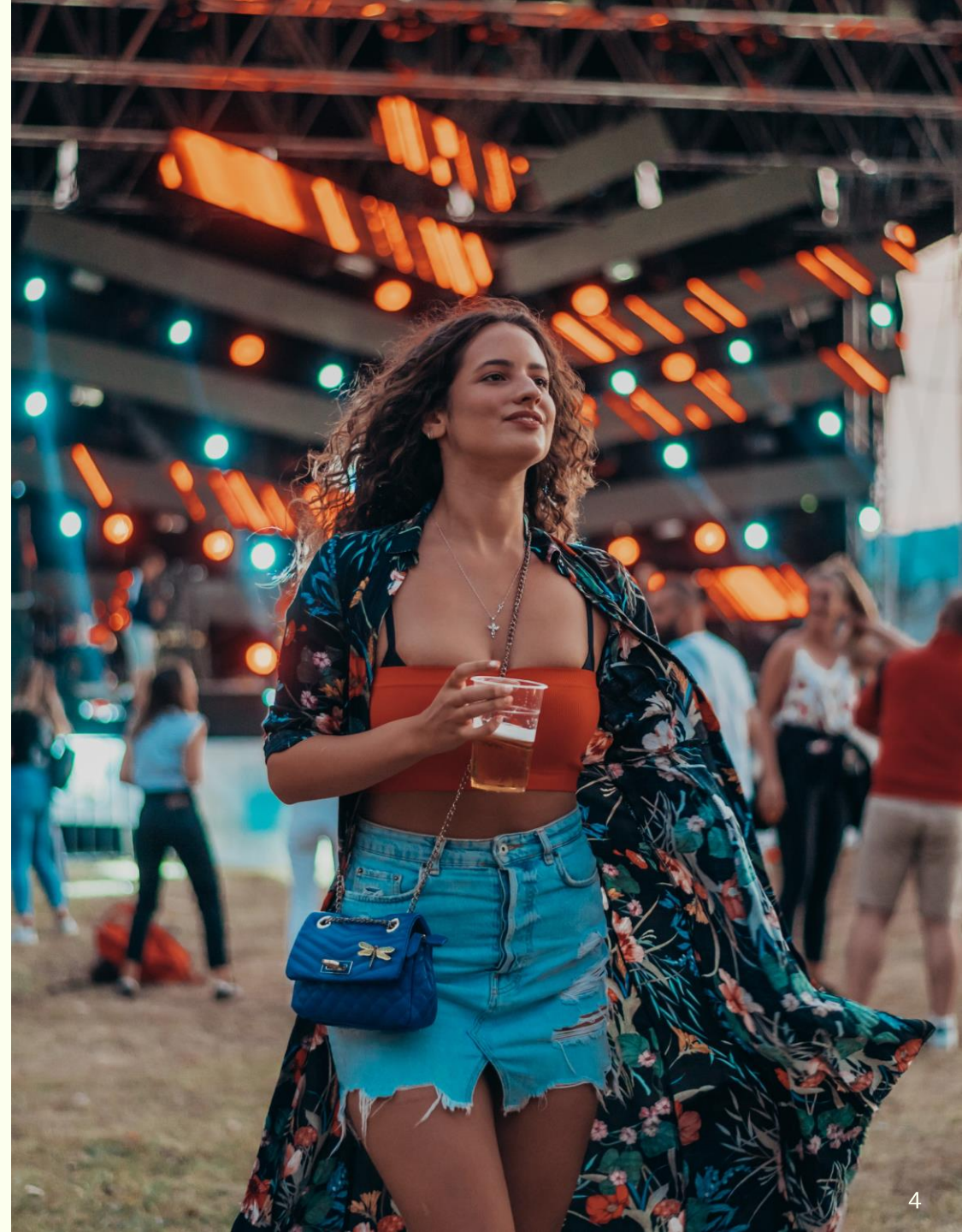
Research Overview & Objectives

Reno Tahoe sought to understand perceptions of its brand as well as gauge the effectiveness and impact of its current marketing campaign. To achieve this, Future Partners developed a research study to provide critical insights into Reno Tahoe's target audience, including:

- Understanding motivations and travel attitudes among Reno Tahoe's target audience
- Understanding recent and future travel intentions
- Evaluating Reno Tahoe's brand attributes and brand health performance
- Assessing Reno Tahoe's competitive position
- Gauging marketing recall and aided advertising awareness
- Interpreting the influence of advertising on brand perceptions and travel behavior
- Identifying how to guide future destination marketing and management efforts

The study was fielded between July and December 2023 to U.S. travelers aged 25 to 54 with a household income greater than \$100,000. A total of 1,829 survey responses were collected via online survey, with data weighted as necessary.

If interested in any further analysis, please contact your Future Partners Research Director.



About This Report: Segment Definitions

This report analyzes data from the overall target traveler audience (also referred to as “Total”, “Target audience”, and “Target travelers”) along with key segments of interest to Reno Tahoe's marketing strategy. These groups include varying experiences, perspectives, and exposure to Reno Tahoe & its brand, as well as distinct persona types. Examining these segments can help Reno Tahoe understand to better attract new visitors and encourage return visits. The segments and their technical definitions are detailed below.

- **Cultured Creative** – Travelers who:

- **Strongly identify** with: “I prefer experiences where I can really get a sense for the essence and culture of a place” AND “I travel to open my mind to new cultures and experiences” AND “I enjoy trying new things such as foods, experiences, and activities.”
- Are **motivated to travel** to: “immerse myself in the arts” AND “explore new things.”
- **Prioritize**: “winter sports” OR “outdoor activities and recreation” OR “variety of museums/art galleries” OR “variety of special events/festivals” as destination attributes when selecting where to vacation.

- **Mindful Mom** – Travelers who:

- **Identify** as women AND **have** children under 18 in their household.
- Are **motivated to travel** to: “spend more quality time with my family.”
- **Prioritize**: “family friendly activities” AND 1 of: “spas/wellness activities” OR “outdoor activities and recreation” OR “shopping – unique boutiques/local artisans” OR “variety of museums/art galleries.”

- **Ambitious Adventurer** – Travelers who:

- **Strongly identify** with: “I prioritize visiting places with strong sustainability initiatives” AND “I prefer active time to down time on vacation” AND “I seek out exciting and stimulating experiences when I travel.”
- Are **motivated to travel** to: “feel alive and energetic” AND “seek adventure.”
- **Prioritize**: 1 of: “winter sports” OR “outdoor activities and recreation” OR “water activities” AND 1 of: “variety of museums/art galleries” OR “fine dining.”

- **Recent Visitor** – Travelers who visited Reno Tahoe in 2023.

- **Lapsed Visitor** – Travelers who have visited Reno Tahoe, but before 2023.

- **Never Visited** – Travelers who have never visited Reno Tahoe.

For Ad Effectiveness Sections Only

- **IMC Aware** – Travelers who have, in the past 12 months, encountered or engaged with Reno Tahoe’s brand through an “integrated marketing campaign”, including owned (website or social media accounts), earned (news stories, articles, or blogs – not sponsored), and paid media (ads, sponsored social media content, sponsored articles, etc.).

- **IMC Unaware** – Travelers who have not experienced the above in the past 12 months.

- **Paid Aware** – Travelers who have seen advertisements, sponsored social media posts, billboards, and/or sponsored articles paid for by Reno Tahoe in the past six months.

- **Paid Unaware** – Travelers who have not seen paid promotional materials from Reno Tahoe in the past six months.

Executive Summary

Reno Tahoe's brand remains successful among the target audience. Interest in visiting the destination is higher than key competitors, with opportunity for growth.

Two in five target travelers are interested in visiting Reno Tahoe in the next two years, placing it above Phoenix and Salt Lake City. However, only one in five reported plans to do so in the next 12 months.

Half of those not interested in visiting Reno Tahoe in the next two years cite the destination not being on their radar as a reason. The same barrier is most common among those interested but not planning to visit in the next year, presenting an opportunity to increase awareness with the target audience.

Reno Tahoe excels in delivering on its core strengths – outdoor recreation and gaming, which also emerge as the top-of-mind associations among the target audience.

Not only are these two its top-rated attributes, but competitive position analysis also shows Reno Tahoe besting most rivals in target travelers' perceptions in these regards.

However, there is ground to cover before Reno Tahoe can call itself the premier destination for these qualities – it falls at second place for each of these attributes. Salt Lake City comes out on top for outdoor recreation and winter sports, while San Diego surpasses Reno Tahoe in water activities.

Still, Reno Tahoe has room to grow in its goal of being seen as an events epicenter, as well as in perceptions of some highly prioritized attributes.

Event enthusiasts don't view Reno Tahoe as a top events destination: only 64.5% of those prioritizing it when selecting destinations agree that it delivers on special events and festivals, placing it outside Reno Tahoe's top ten strengths (at #11) as perceived by this group.

Further, in the minds of its target audience, Reno Tahoe underdelivers on good value for money and being easily accessible, which are the 1st and 3rd most prioritized attributes.

Reno Tahoe's target audience and outdoor enthusiasts do not yet fully appreciate the destination's après offerings, including nightlife, fine dining, live music, and breweries.

There is potential for improvement as Reno Tahoe continues to reinforce its position as the ultimate urban basecamp for the target audience and outdoor adventurers. Agreement that Reno Tahoe delivers on various après attributes is lower for them (47-53% among the target audience, 55-63% among Reno Tahoe outdoor enthusiasts) compared to those who appreciate the destination's non-outdoor offerings (71-75%), showing potential and opportunity for growth.

Prioritizers of outdoor recreation share similarly lukewarm perceptions of the destination's nighttime offerings (55-62% agreeing that Reno Tahoe delivers).

Reno Tahoe's advertising efforts are successful at converting interest into action, with even greater reach achievable by fully leveraging unpaid channels.

One in five target travelers saw a paid ad for Reno Tahoe in 2023. Nearly one third of those who saw the ads said they booked a trip as a result.

Promotion through earned coverage and owned channels, such as the website, social media, and YouTube, significantly boosts reach. Awareness of Reno Tahoe's advertising efforts nearly doubles from 20% of the Paid Aware target audience to 37% when integrating unpaid marketing. Increases are even larger among key segments.

As expected, Reno Tahoe's integrated marketing is linked to better visitor outcomes than paid ads alone and correlates with improved perceptions of Reno Tahoe.

Recent visitor data reveals a link between engagement with Reno Tahoe's IMC and the key visitor metrics of length of stay and average daily spend. This correlation significantly outperforms that seen with paid advertising exposure alone. Reno Tahoe's website, Facebook, and Instagram channels appear particularly effective within the IMC mix, since recent visitors are most likely to have engaged with those channels in the previous year.

Furthermore, exposure to Reno Tahoe's IMC is linked to expanded traveler perceptions of its offerings, unveiling its versatility as a destination. IMC Aware travelers agreed that the destination delivers on all attributes at far higher rates (15- to 43-point gaps) than IMC Unaware travelers for attributes beyond its core strengths, including value for money, showcasing IMC's potential to enrich perceptions toward a more well-rounded and appealing destination image.

Target Audience Profile

This section presents an overview of Reno Tahoe's target audience, defined as travelers aged 25 to 54 with a household income greater than \$100,000.

The profile includes:

- Demographic characteristics
- Approach to travel
- Past and planned travel
- Relationship with Reno Tahoe as a destination (i.e., interest, likelihood to visit, barriers to visiting, and associations)
- Awareness & impact of Reno Tahoe's marketing

Note: Future Partners has also created an addendum to this report that includes this profile and profiles for the three persona types: Cultured Creatives, Mindful Moms, and Ambitious Adventurers.



Target Audience Demographic Characteristics

**42 years
old on
average**

**\$150,000
average
household
income**

**81%
married**

**62%
have
children**

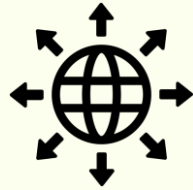
**26%
BIPOC**

**6%
LGBTQ+**

**6%
Accessibility
Needs**

Target Audience

Approach to Travel



Expansion

Target travelers enjoy trying new things, like foods, experiences, and activities. They tend to seek out exciting and stimulating experiences when traveling, are motivated in travel to explore new things and live life to its fullest.



Escape

For Reno Tahoe's target audience, travel is about taking a break from everyday life. Target travelers want to feel alive and energetic while on vacation. A major component of escape is rest & relaxation, as well as treating themselves.



Connection

Spending time with family and making memories is very important to target travelers. They specifically travel to spend more quality time with their family and to connect with their significant other.

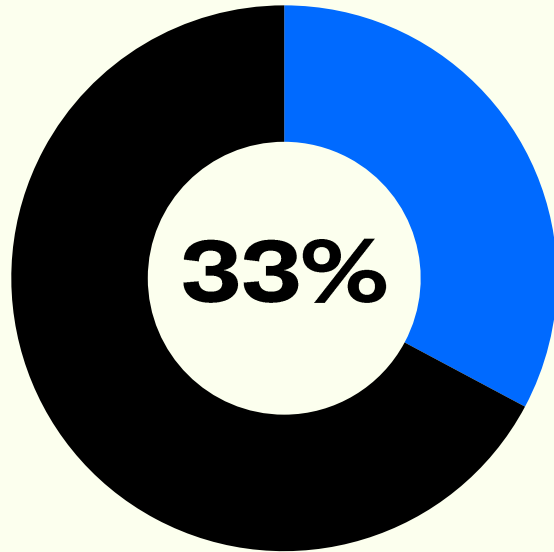


Immersion

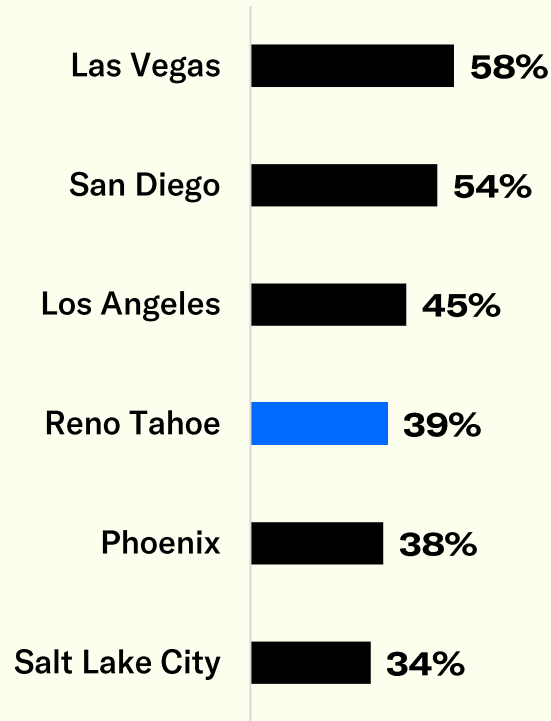
The target audience travels to open their minds to new experiences and cultures, be outside and reconnect with nature, and have experiences where they can get a sense for the essence and culture of a place.

Past & Future Travel Behavior

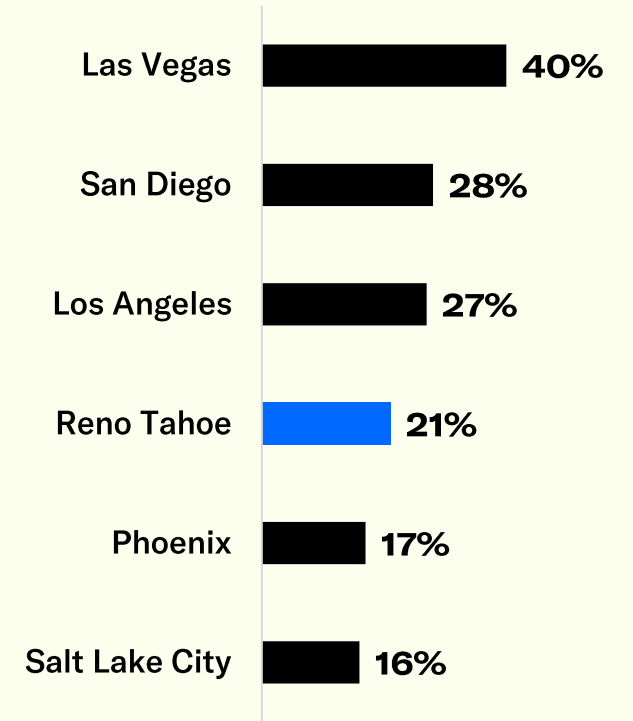
**% Who Have Visited
Reno Tahoe as an
Adult**



**Cities They Are
Interested in Visiting in
the Next Two Years**



**Cities They Are Planning
to Visit in the Next 12
Months**



Relationship with Reno Tahoe



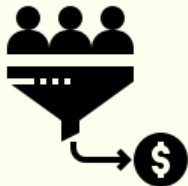
Destination Attraction has Room for Growth

Four in ten target travelers (39%) are interested in visiting Reno Tahoe in the next two years, falling behind major competitors like Las Vegas (58%), San Diego (53%), and Los Angeles (45%).



Outdoors & Gaming are Top Identifiers

The target audience believes Reno Tahoe delivers on outdoor activities and recreation, gambling/casinos, water access/activities, and winter sports. They also see the destination as being family-friendly and offering Instagram-worthy experiences.



Opportunity Exists to Convert Desire into Visitation

Just over one in five target travelers say they plan to visit Reno Tahoe in the next 12 months (21%). The delta between desire and intent to visit is just 18 percentage points – an achievable target for influencing conversion.





Lack of Awareness is a Key Barrier

For those not interested in visiting Reno Tahoe, the top barrier is that the destination is not on their radar (31%). Compared to other attributes, Reno Tahoe lags in perceptions that it offers good value and easy access, suggesting opportunities to boost awareness by highlighting convenience factors like accessible travel options and the destination's value proposition.

Reaching the Target Traveler

1









Daily Media Consumption

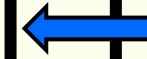
	Use social media	80%
	Watch video content on streaming platforms	62%
	Read news articles	49%
	Watch online content	52%
	Watch traditional TV	47%
	Listen to streaming audio	47%
	Listen to AM/FM radio	37%
	Read lifestyle magazines	13%



2

Social Media Channels

	Facebook	86%
	YouTube	75%
	Instagram	71%
	X/Twitter	46%
	TikTok	39%
	Pinterest	38%
	Reddit	30%
	Snapchat	29%



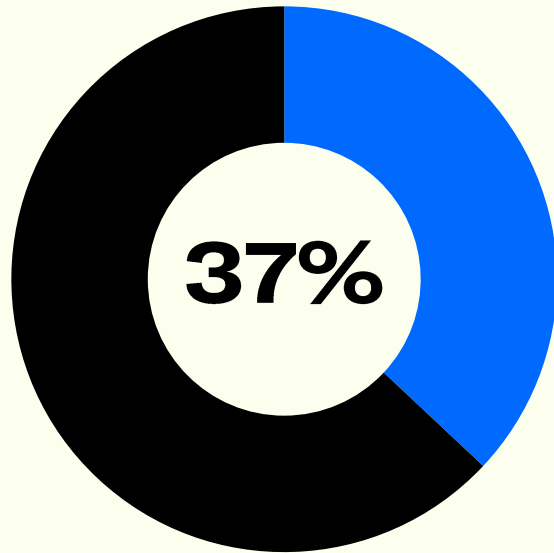
3

Top Travel Inspiration

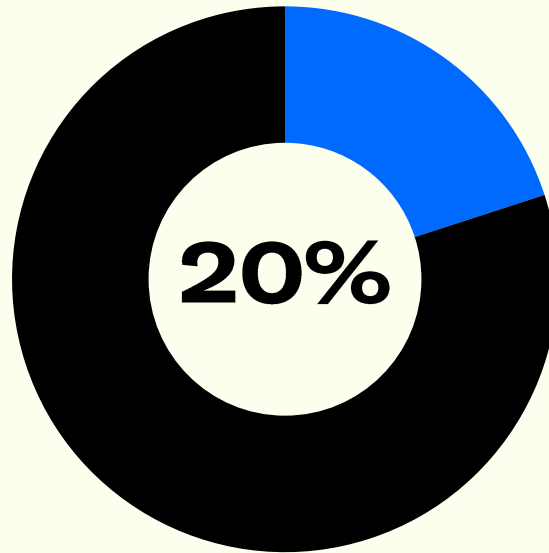
Online searches	49%
Friends/family via direct contact	47%
Travel review sites	38%
Social media	38%
Friends/family via social media	36%
Online videos	33%
Online travel agencies	28%

Marketing Awareness & Impact

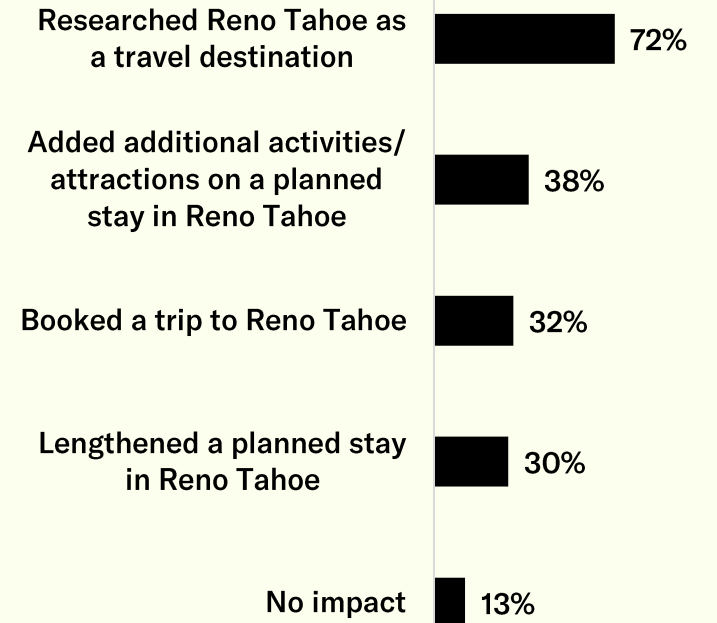
Past-12-Month Integrated Marketing Campaign Awareness



Past-6-Month Paid Media Awareness



Actions Taken After Seeing Ad





Detailed Findings on Brand Health

Detailed Findings: Travel Decision Motivators

Enjoying trying new things and spending time, making memories with family are top travel attitudes

In terms of travel attitudes, target travelers most often say they enjoy trying new things like foods, experiences, and activities while traveling (88%) and that spending time with family and making memories is important to why they travel (85%). Three in four target travelers travel to open their minds to new experiences and cultures (75%), seek out exciting and stimulating experiences when traveling (74%), and prefer experiences where they can really get a sense for the essence of a place (72%). Overall, the results reveal a target audience seeking expansion and immersion in their travels, while holding value for cherished family moments.

Travel Attitudes (Top 2 Box)
 (% Selecting “4” or “5 – Describes Me Perfectly”)

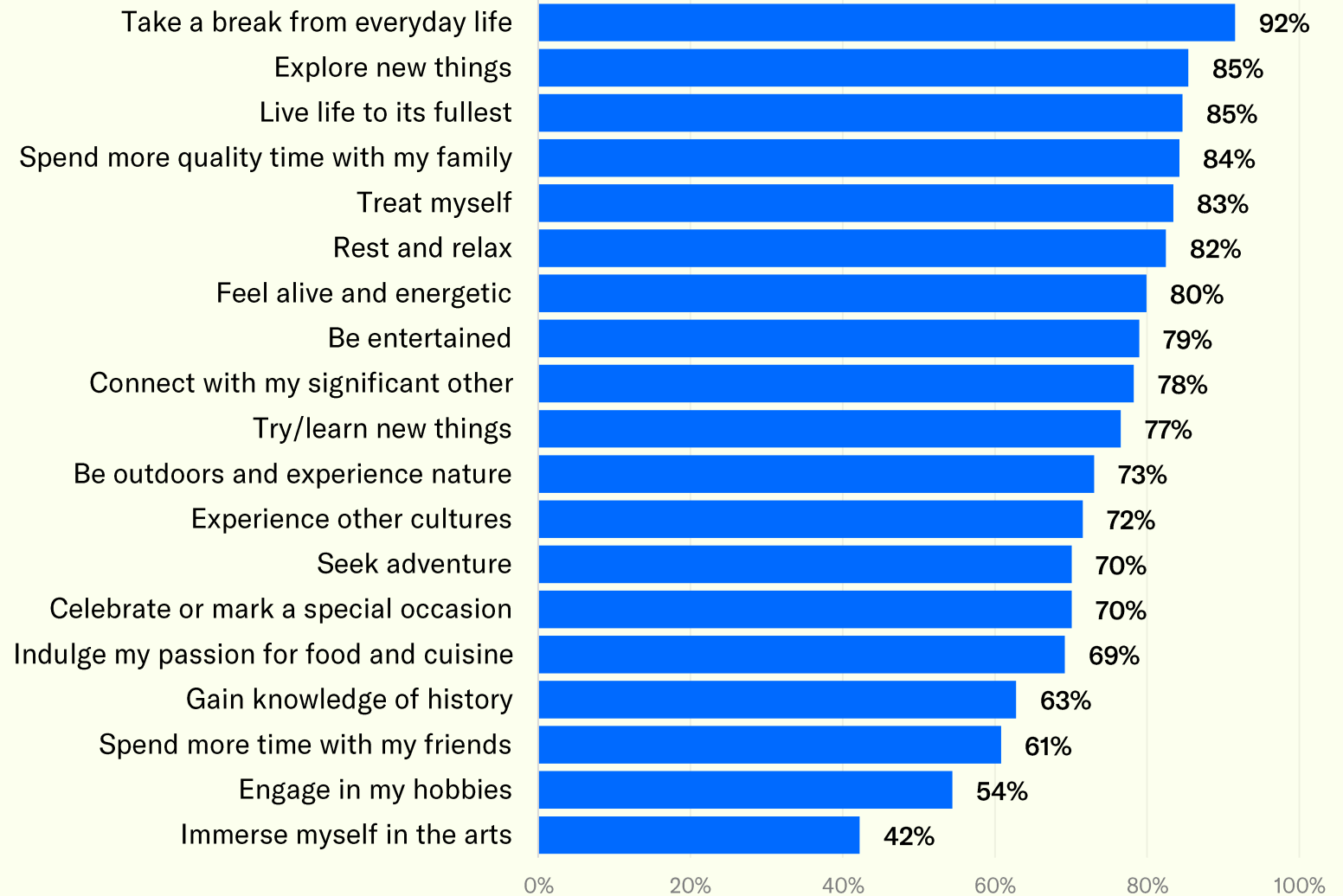


Question: How much do each of the following statements describe you?
 Base: Total target audience. 1,829 completed surveys.

An overwhelming majority of target travelers are motivated to travel to escape from everyday life

Top travel motivators for target travelers include taking a break from everyday life (92%), exploring new things (85%), living life to its fullest (85%), and spending more quality time with family (84%).

Travel Motivators (Top 2 Box)
(% Selecting “4” or “5 – Describes Me Perfectly”)

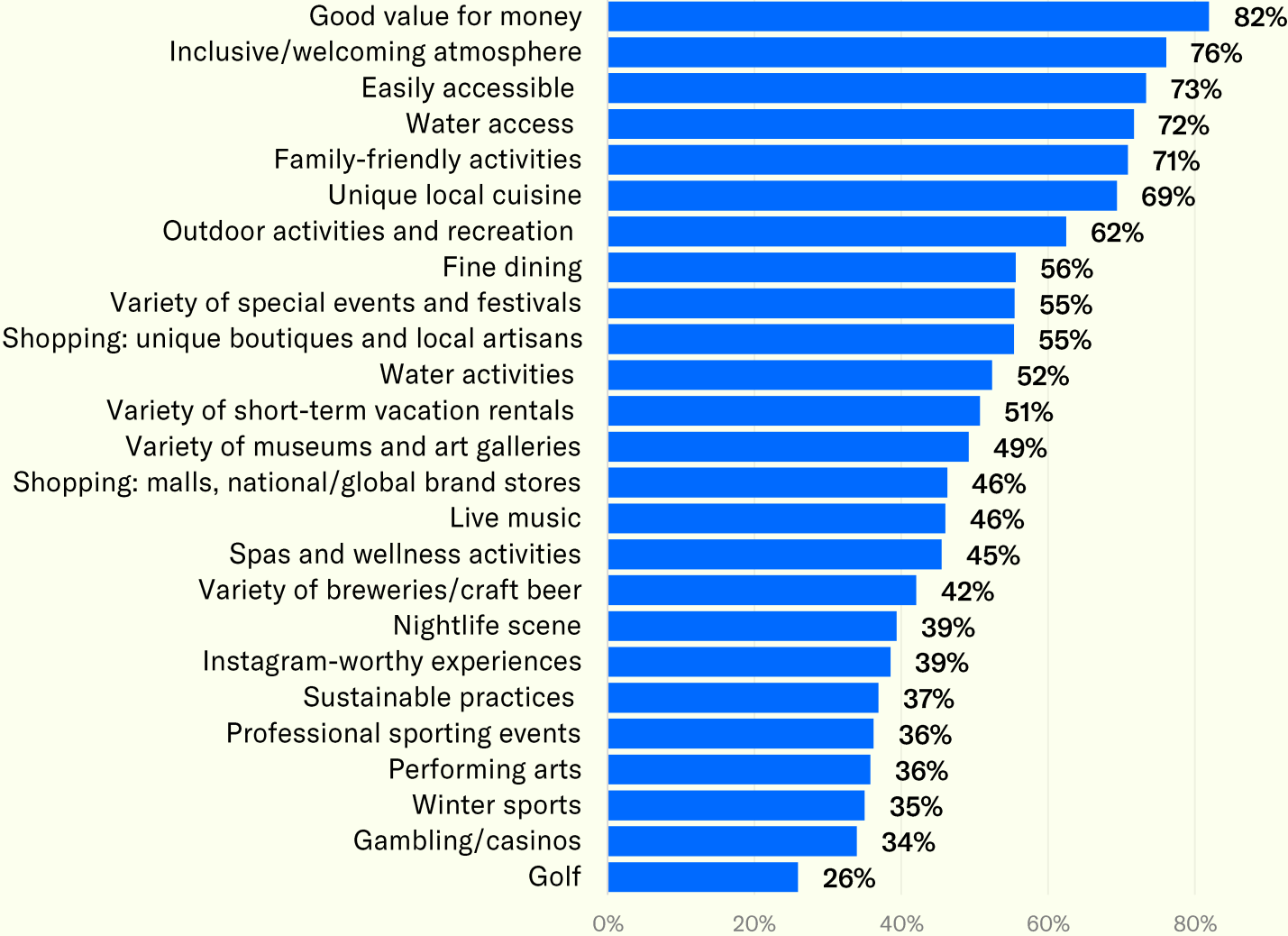


Question: Why do you travel? I travel to...
Base: Total target audience. 1,829 completed surveys.

When selecting a vacation destination, good value for money is most prioritized, followed by an inclusive/welcoming atmosphere

The top attribute that target travelers look for when selecting a destination is good value for money (82%). This is followed by an inclusive/welcoming atmosphere (76%), easy access (73%), water access (72%), family-friendly activities (71%), and unique local cuisine (69%). The least prioritized destination attributes are Golf, with just over a quarter (26%) of target travelers noting it as an important factor in their destination selection, followed by gambling/casinos and winter sports, which are prioritized by just over one-third of target travelers.

Destination Attribute Importance (Top 2 Box)
 (% Selecting “4” or “5 – Extremely important”)



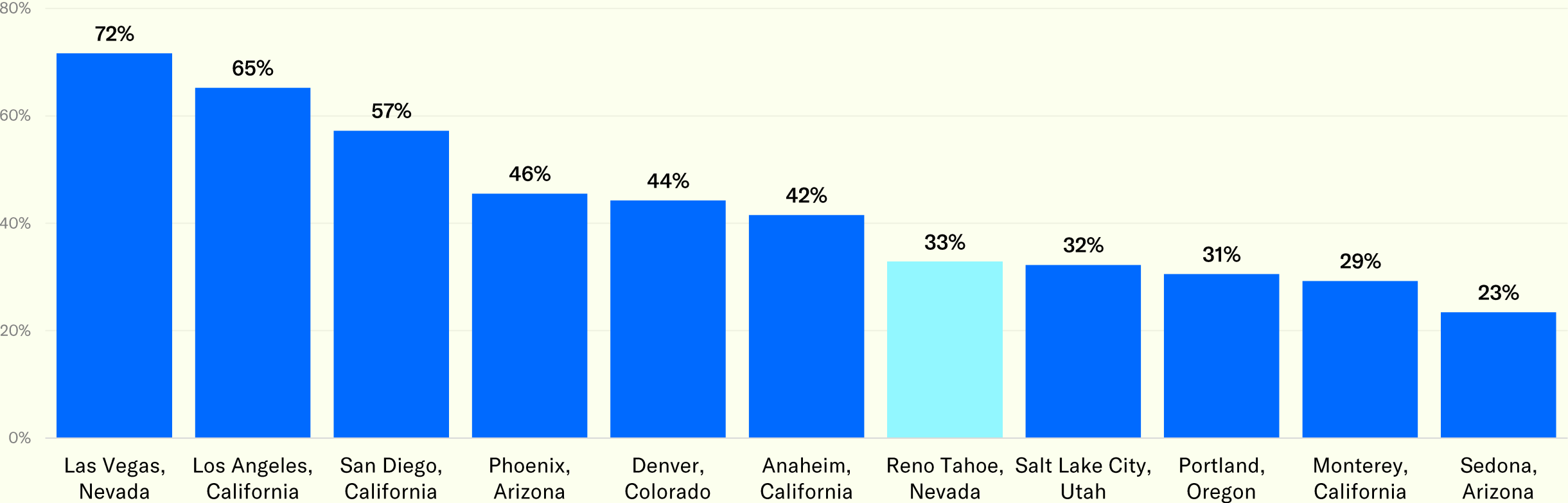
Question: How important are the following to you when selecting a vacation destination?
 Base: Total target audience. 1,829 completed surveys.

Detailed Findings: Past & Planned Travel to Reno Tahoe

One-third of target travelers have visited Reno Tahoe as an adult

Las Vegas (72%) and Los Angeles (65%) are the destinations target travelers have most frequently visited as adults, followed by San Diego (57%). A smaller group has visited Phoenix (46%), Denver (44%), and Anaheim (42%). Meanwhile, Salt Lake City and Portland are on par with Reno Tahoe, each having been visited by roughly one-third of the target audience (32% and 31%, respectively). Sedona was the least visited, with less than a quarter (23%) of target travelers having visited as adults.

Destinations Visited as an Adult
(% Indicating They Have Visited Destination as an Adult)

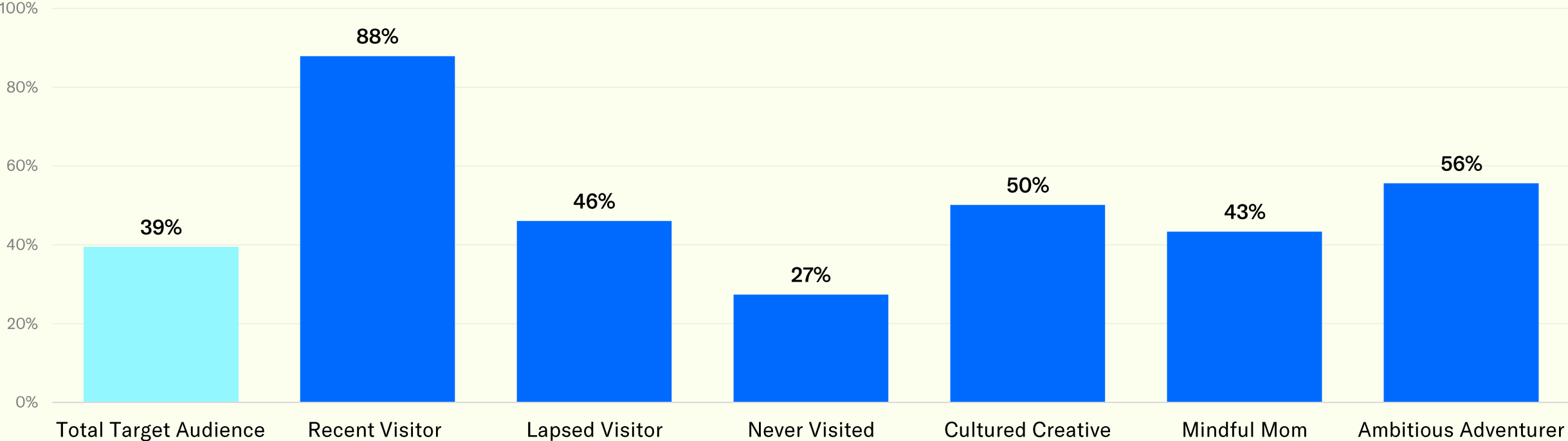


Question: Which of the following destinations have you visited as an adult (that is, after age 18)?
Base: Total target audience. 1,829 completed surveys.

About 4 in 10 target travelers report interest in visiting Reno Tahoe in the next two years

Recent visitors are enthusiastic about returning, with interest in revisiting at more than double the rate of the overall target audience (88%). This suggests they have formed a strong connection with the destination and could potentially become destination champions. Conversely, those who have never visited show the least interest in visiting in the next two years. However, a notable 27% are open to the idea, presenting an opportunity for conversion. Among persona-based segments, Ambitious Adventurers are most eager to visit Reno Tahoe in the next two years (56%), while Mindful Moms express the least interest (43%), though their interest level still slightly exceeds the average traveler.

Interest in Visiting Reno Tahoe in the Next 2 Years
(% Selecting Reno Tahoe, Nevada)

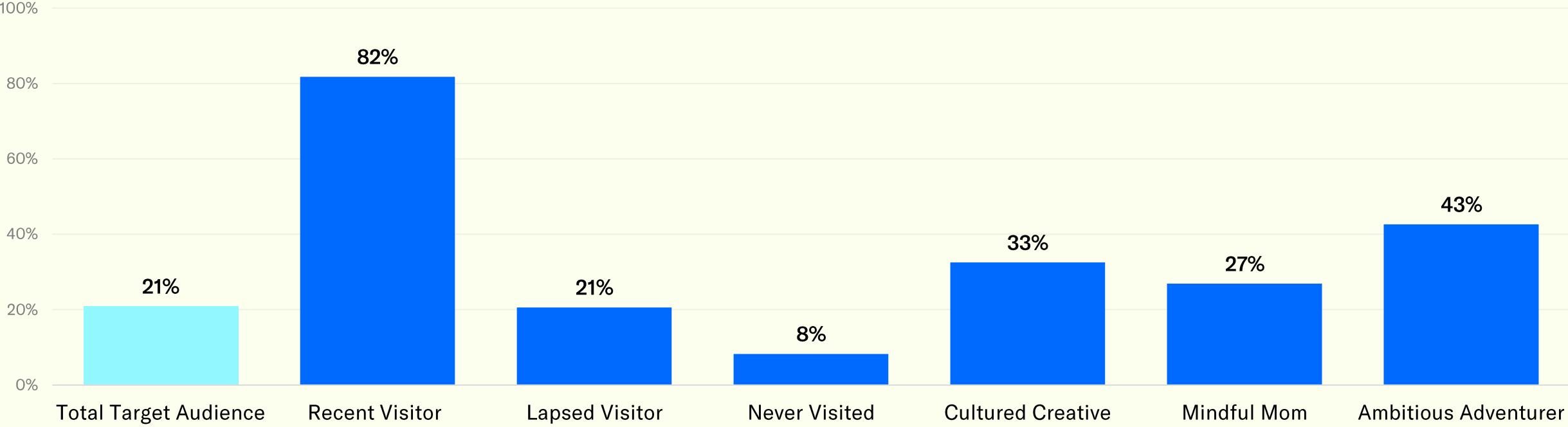


Question: Which of the following destinations are you interested in visiting in the next two years? Select all that apply. – Reno Tahoe, NV
Base: Total target audience. 1,829 completed surveys.

Intent to visit Reno Tahoe in the next year is 18 points lower than interest in visiting within two years, highlighting a significant opportunity to convert intrigue into bookings

Just over one in five target travelers are planning to visit Reno Tahoe in the next 12 months (21%). Recent visitors overwhelmingly intend to return (82%), highlighting their affinity for Reno Tahoe. However, lapsed visitors and the overall target audience share a similar, less-enthusiastic interest level (21%). This suggests a potential divide between frequent visitors with strong loyalty, and those who view Reno Tahoe as an occasional destination. Among persona types, Ambitious Adventurers (43%) and Cultured Creatives (33%) show the strongest intent to visit in the next year. Mindful Moms express the least interest (27%), though still exceeding the overall average.

Intent to Visit Reno Tahoe in the Next 12 Months
(% Selecting Reno Tahoe, Nevada)



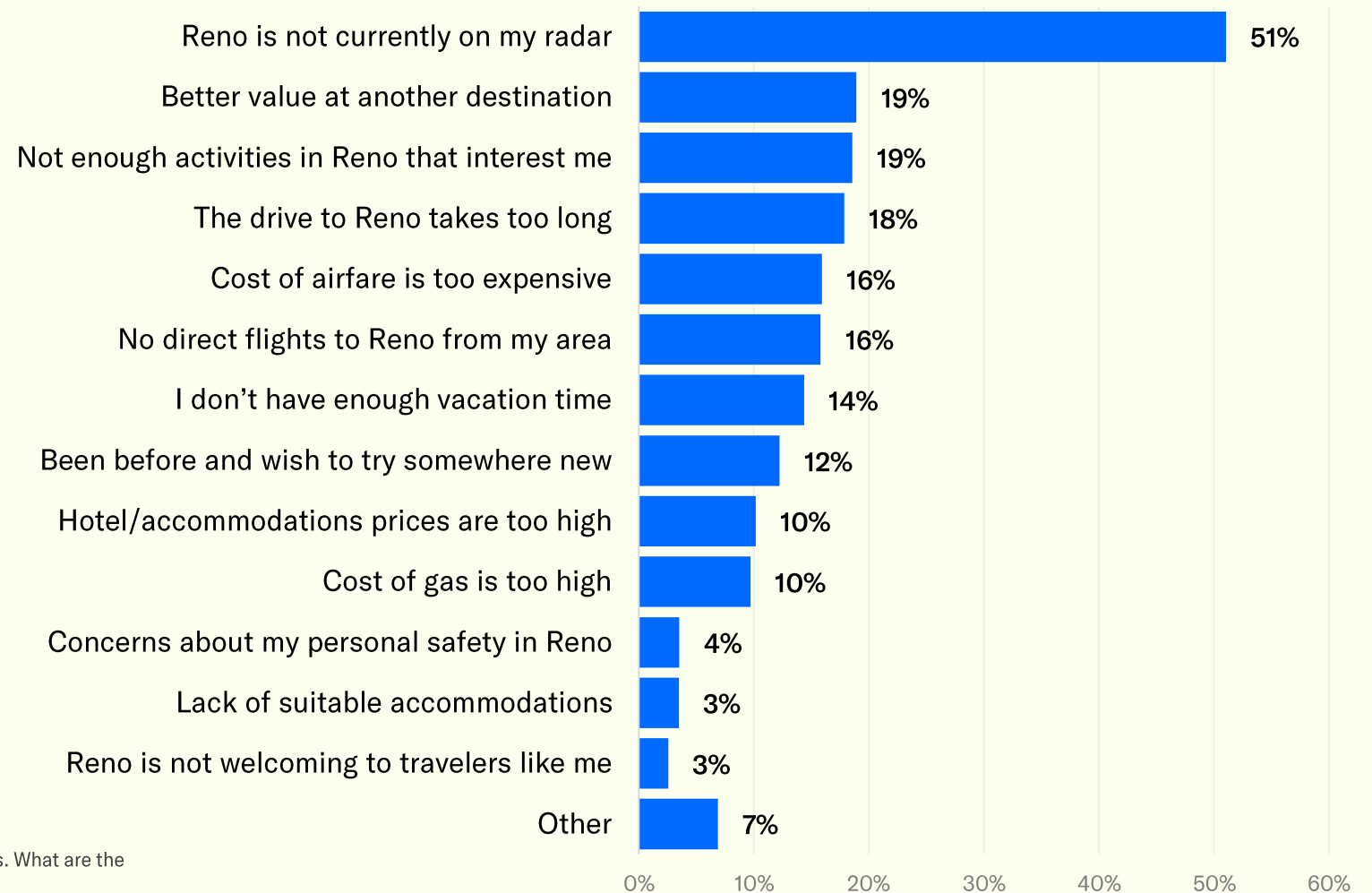
Question: Which of the following destinations are you planning to visit in the next 12 months? Select all that apply. – Reno Tahoe, NV
Base: Total target audience. 1,829 completed surveys.

Not being on their radar was one of the main reasons cited by target travelers who were not interested in visiting in the next two years

Of those who said they are not interested in visiting Reno Tahoe in the next two years, the top barrier is simply that Reno is not on their radar, emerging as a reason for a slight majority – but a majority nonetheless – of these target travelers (51%). This is followed distantly by better value at another destination (19%), not enough activities of interest (19%), the drive taking too long (18%), airfare being too expensive (16%), and no direct flights to Reno (16%).

Reasons Why Target Travelers Aren't Interested in Visiting Reno Tahoe in the Next 2 Years

(% Selecting as a Reason)



Question: Earlier you said you were not interested in visiting Reno Tahoe in the next 24 months. What are the reasons for not considering a trip to Reno Tahoe at this time?

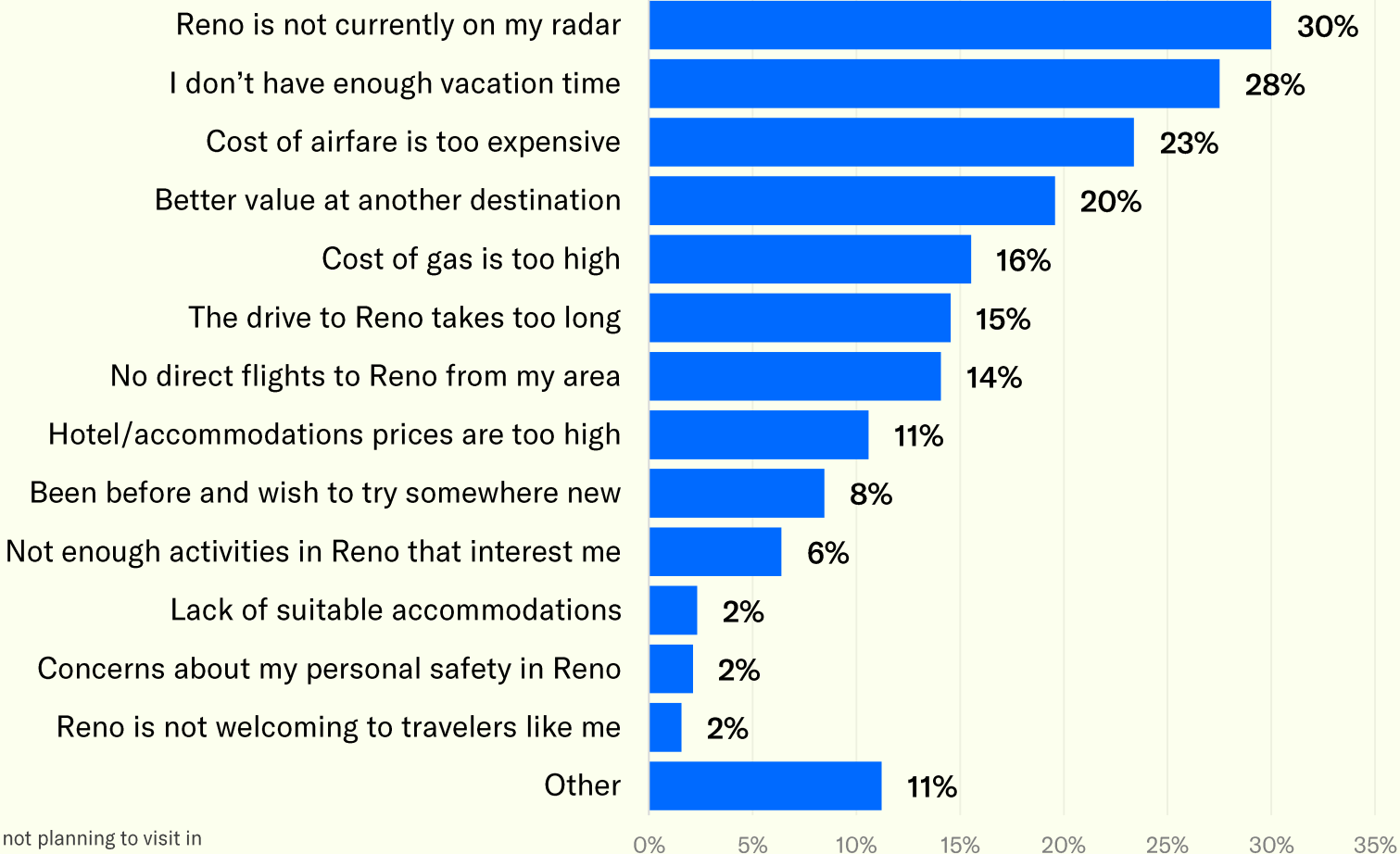
Base: Target audience not interested in visiting Reno Tahoe in the next two years. 1,095 completed surveys.

Those who are interested in visiting Reno Tahoe in the next 2 years but don't plan to visit in the next year most often cite Reno not being top-of-mind or a lack of vacation time

Intriguingly, even among those who are interested in visiting Reno Tahoe but not planning a trip in the next 12 months, the top barrier is Reno not being on their radar (30%), despite their expressed interest. The next most frequently selected barrier for a next-year trip was not having enough vacation time (28%), followed by airfare being too expensive (23%).

This finding suggests that Reno Tahoe's current marketing efforts may not be effectively converting latent interest into active consideration. Fortunately, negative perceptions are not a source of friction: Potential visitors very rarely cite a lack of activities that interest them (6%) or concerns about the destination being unsafe or unwelcoming (2% each).

Visitation Barriers for Target Travelers Who Are Interested in Visiting but Not Planning to in the Next 12 Months
(% Selecting Reason)



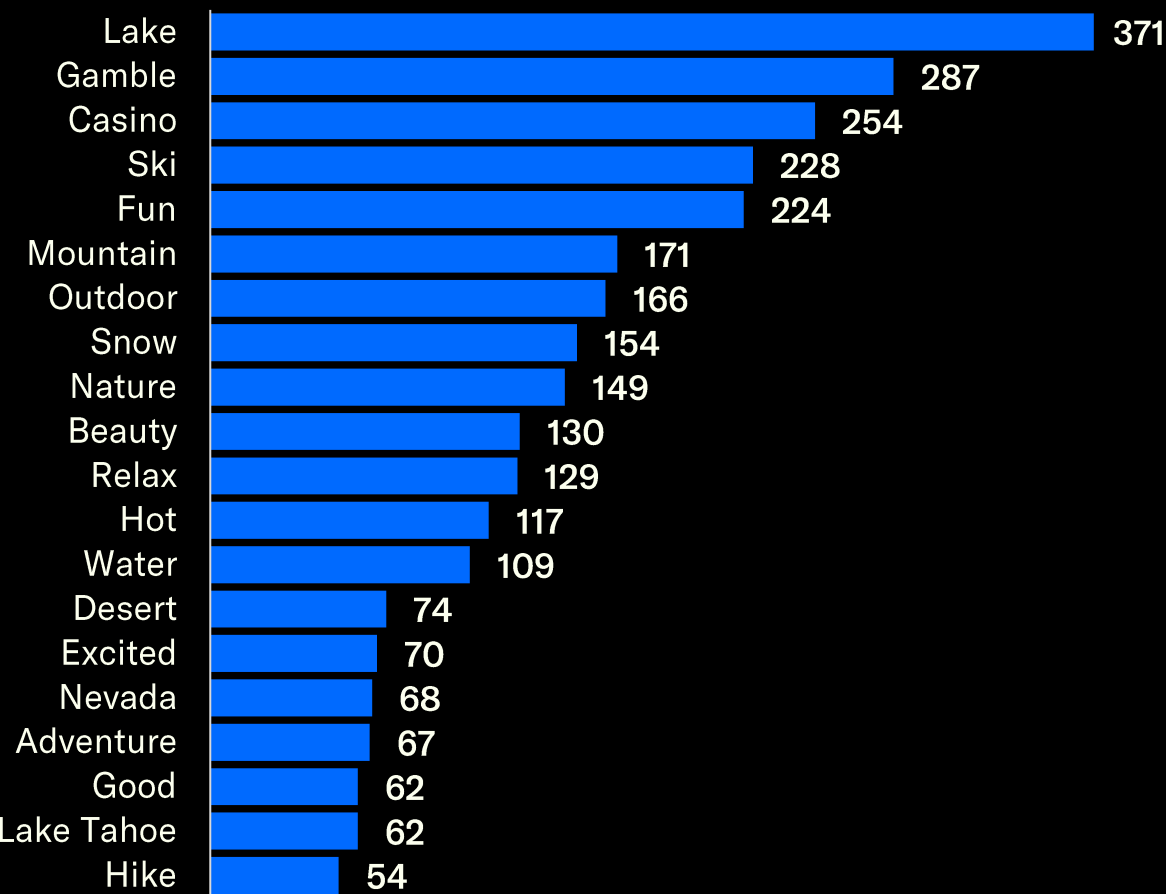
Question: Earlier you said you were interested in visiting Reno Tahoe in the next 24 months, but not planning to visit in the next 12 months. What are the reasons for considering but not planning a trip to Reno Tahoe at this time?
Base: Target audience interested but not planning to visit Reno Tahoe in the next 12 months. 358 completed surveys.

Detailed Findings: Perceptions of Reno Tahoe

When asked open-endedly, target travelers most commonly associate Reno Tahoe with the lake, gaming, skiing, and fun.

The Top 50 Words the Target Audience Associates with Reno Tahoe*
(size of word represents relative frequency)

Top 20 Words Associated with Reno Tahoe with Counts



Question: Thinking about Reno Tahoe as a vacation destination, what are the first three words that come to mind?

*Beauty includes “beautiful” and “beauty”; “Lake” and “Lake Tahoe” were counted separately

Outdoor activities and recreation and gambling/casinos are the destination attributes most commonly associated with Reno Tahoe

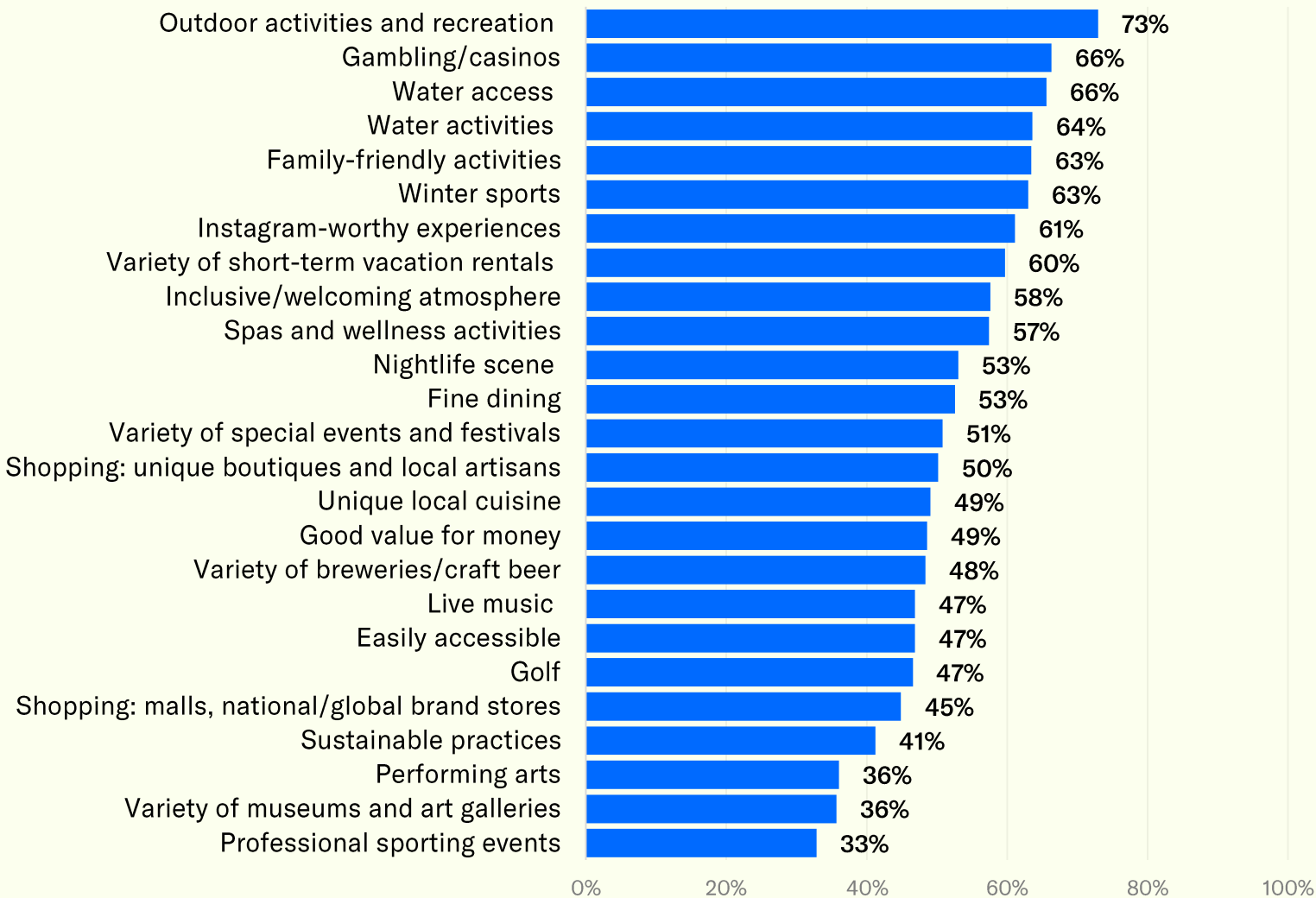
Reno Tahoe is heavily associated with outdoor recreation, with nearly 3 in 4 target travelers (73%) agreeing that the destination delivers on that attribute. Outdoor rec is perceived as a strength both in and of itself as a category but also in terms of related attributes such as water access (66%), water activities (64%), and winter sports (63%).

Travelers also perceive Reno Tahoe as delivering well on its gaming scene, with a strong 66% agreement, making it the destination's second most appreciated attribute.

Reno Tahoe's cultural elements like performing arts and variety of museums and art galleries are viewed as relatively lacking, with only 36 percent of target travelers agreeing that Reno Tahoe delivers on those aspects.

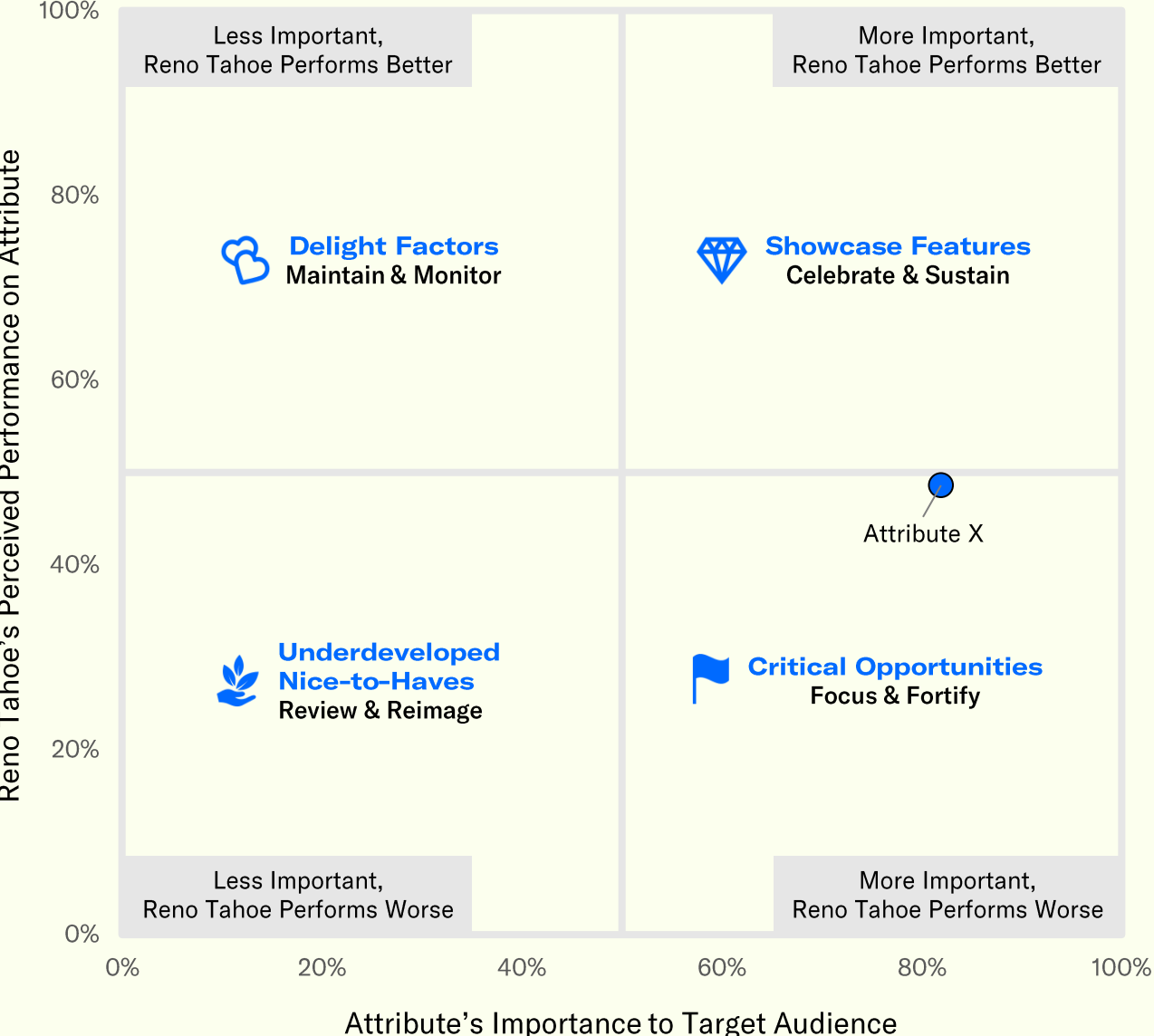
Reno Tahoe Destination Attribute Perceptions (Top 2 Box)

(% Agreeing that Reno Tahoe Delivers on Attribute)



Question: For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not.
 Base: Target audience. 1,829 completed surveys.

The 2x2 Reno Tahoe Attribute Analysis Chart: What It Is and How to Read It



What It Is & How to Read It

In general, a **2x2 Destination Attribute Analysis Chart** displays how important different destination attributes are to a destination’s target audience and how well a destination is perceived to deliver on those attributes. In the slide after next, we present Reno Tahoe’s Attribute Analysis Chart. Guidance on interpreting below:

- **Attribute’s Importance to Target Audience (horizontal “x” axis):**
This axis shows the percentage of your target audience who rated the attribute as "very" or "extremely" important when selecting a vacation destination.
- **Reno Tahoe's Perceived Performance on Attribute (vertical “y” axis):**
This axis shows the percentage of your target audience who agreed (selected 4/5 on a scale of 1 - strongly disagree to 5 - strongly agree) that Reno Tahoe delivers on that attribute.

For example, Attribute X to the chart on the left is “very” or “extremely” important to roughly 80 percent of the audience. Reno Tahoe is perceived to deliver on Attribute X by slightly less than 50 percent of the target audience.

The quadrant delineators are set at **median values**. The vertical line dividing left from right falls at the median importance score across all attributes surveyed. The horizontal line dividing above from below falls at the median performance score for Reno Tahoe across all attributes. Therefore, quadrant placement indicates whether Reno Tahoe is performing above or below its general standard on an attribute and whether that attribute is generally considered more or less important by your target audience. In that sense, the chart doesn't provide absolute rankings compared to competitor destinations but rather highlights **relative** strengths and weaknesses.

The 2x2 Reno Tahoe Attribute Analysis Chart: What to Do With It



What to Do With It

The chart can be used to identify which attributes are:

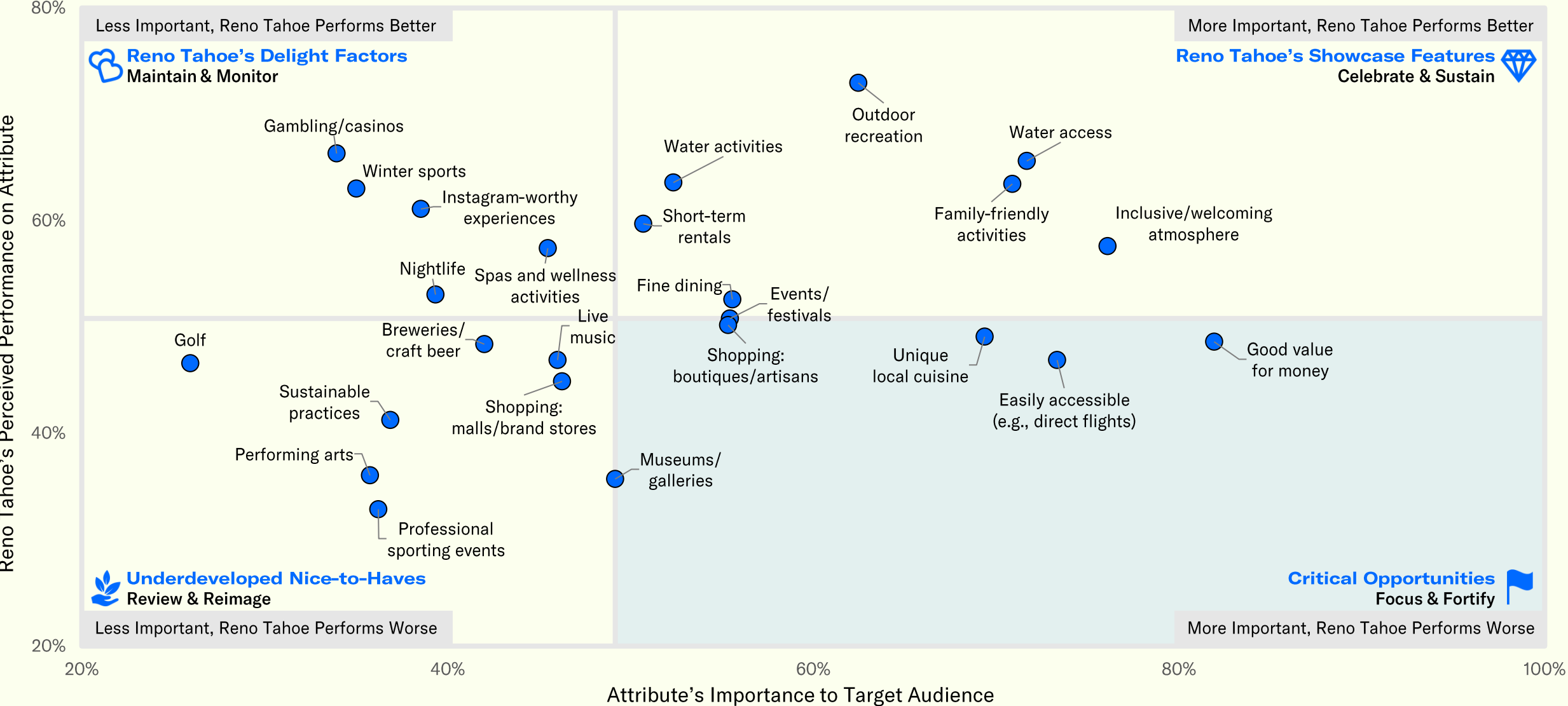
- **Showcase Features** (Higher Performance, High Importance): These are attributes Reno Tahoe is delivering on that are very important to your target audience. These are **strengths** to preserve, leverage, and promote!
- **Critical Opportunities** (High Importance, Low Performance): These are attributes that your target audience considers important, but Reno Tahoe is not currently perceived as delivering well on. These areas are prime opportunities for improvement and might be a good **focus** for improvement efforts.
- **Delight Factors** (Low Importance, High Performance): These are attributes that may not be the most critical for your target audience, but Reno Tahoe performs well on them. You can consider maintaining or monitoring these.
- **Underdeveloped Nice-to-Haves** (Low Importance, Low Performance): These attributes are not seen as very important, and Reno Tahoe is not perceived as strong in these areas. They could be improved to become more attractive to some visitors but are not a top priority. Still, it is important to be aware of them. Where relevant, consider addressing messaging around them if it is low-hanging fruit, but this should not detract from focusing on the critical opportunities.

By understanding how Reno Tahoe is perceived to deliver on attributes that matter to your target audience, you can make data-driven decisions about where to invest resources to improve your destination's appeal and its competitive positioning.

Reno Tahoe Attribute Analysis

Importance to Target Audience vs. Perceptions of Reno Tahoe's Delivery

Reno Tahoe delivers on many destination attributes that matter, such as **outdoor recreation** and **inclusive/welcoming atmosphere**. The most critical **opportunity area** is **value for money**; others include being easily accessible and unique local cuisine.



Base: Reno Tahoe's Target Audience. 1,829 completed surveys.

Reno Tahoe excels in delivering on its core strengths – outdoor recreation and gaming – but event experiences resonate less strongly with their most likely audience

The typical events enthusiast may not be perceiving Reno Tahoe as a top destination for them right now. Reno Tahoe excels in delivering on its core strengths of outdoor activities and gaming for their respective audiences (79% and 80% agreement, see tables). However, event enthusiasts don't view Reno Tahoe as a top events destination: Only 64.5% agree that it delivers on special events and festivals, placing it outside Reno Tahoe's top ten strengths (at #11) as perceived by this group. In fact, they are more likely to perceive San Diego or Las Vegas as delivering on that attribute (data not shown).

Top 10 Reno Tahoe Attributes among Outdoor Rec Prioritizers
(% Agreeing that Reno Tahoe Delivers)

Rank	Attribute	%
1	Outdoor activities and recreation	79%
2	Water access	71%
3	Family-friendly activities	71%
4	Water activities	70%
5	Gambling/casinos	70%
6	Winter sports	68%
7	Variety of short-term vacation rentals	68%
8	Instagram-worthy experiences	68%
9	Inclusive/welcoming atmosphere	67%
10	Spas and wellness activities	65%

Top 10 Reno Tahoe Attributes among Gaming Prioritizers
(% Agreeing that Reno Tahoe Delivers)

Rank	Attribute	%
1	Gambling/casinos	80%
2	Outdoor activities and recreation	79%
3	Family-friendly activities	79%
4	Spas and wellness activities	78%
5	Inclusive/welcoming atmosphere	78%
6	Variety of short-term vacation rentals	78%
7	Water access	77%
8	Winter sports	76%
9	Nightlife scene	76%
10	Water activities	75%

Top 11 Reno Tahoe Attributes among Events & Festival Prioritizers
(% Agreeing that Reno Tahoe Delivers)

Rank	Attribute	%
1	Outdoor activities and recreation	79%
2	Family-friendly activities	75%
3	Gambling/casinos	72%
4	Water access	72%
5	Variety of short-term vacation rentals	72%
6	Instagram-worthy experiences	71%
7	Water activities	70%
8	Inclusive/welcoming atmosphere	70%
9	Spas and wellness activities	69%
10	Winter sports	68%
11	Variety of special events and festivals	64%

Reno Tahoe's arts scene is linked to positive event perceptions

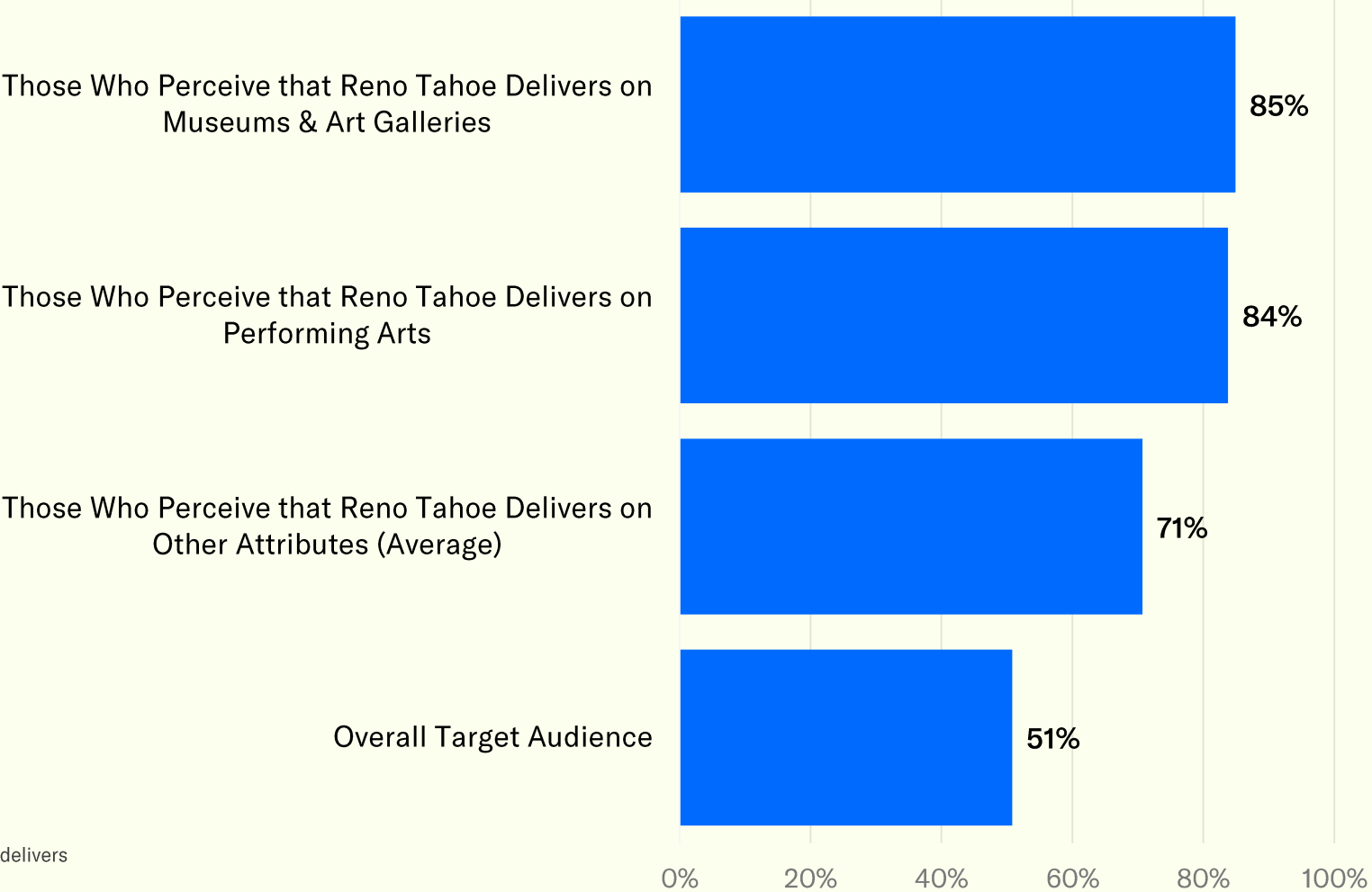
Those who appreciate Reno Tahoe's variety of museums and art galleries and its performing arts are significantly more likely to view its events and festivals favorably:

- 84% perceive Reno Tahoe's events positively, compared to 51 percent of the general target audience (a 33-point gap).
- This positive view is also stronger than those who appreciate other Reno Tahoe attributes (71%) by a noticeable 13-point margin.

This finding highlights a potential correlation between Reno Tahoe's arts scene and positive event perceptions. Further research is needed to determine the relationship between these perceptions, exploring the motivations and preferences of visitors who appreciate Reno Tahoe's cultural offerings. This could provide more nuanced insights enabling better-targeted event promotion and development.

Perception of Reno Tahoe's Performance on Delivering a Variety of Special Events & Festivals

(% Agreeing that Reno Tahoe Delivers)

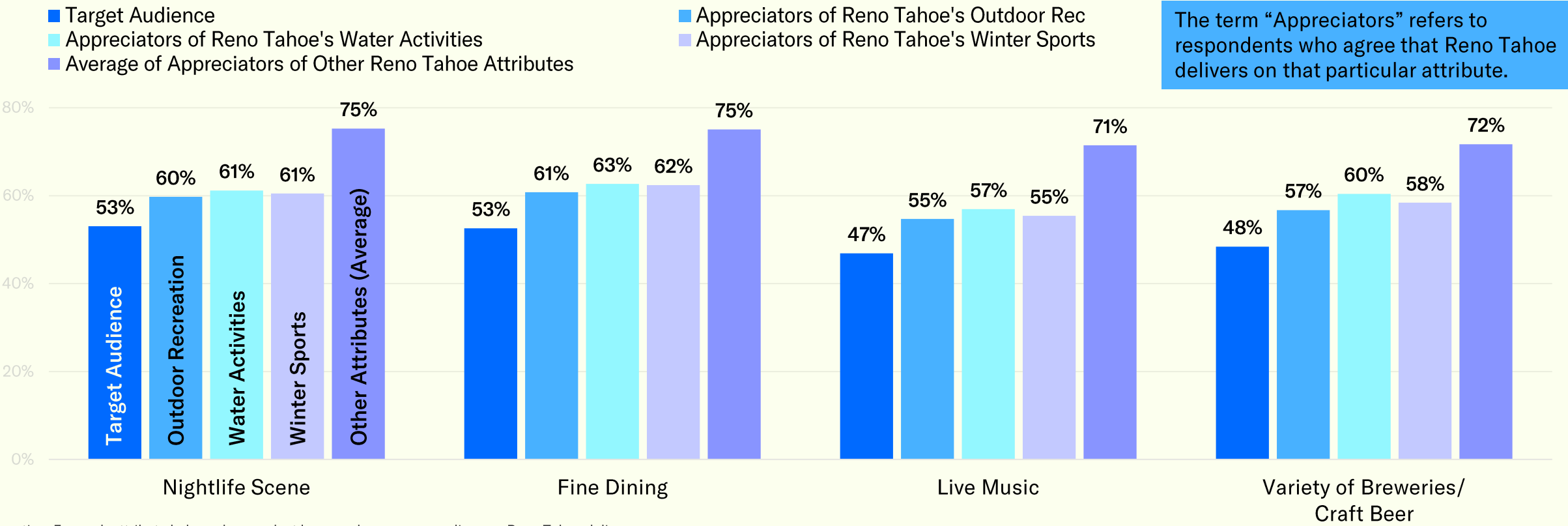


Question: For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not. – Variety of special events and festivals
Base: Reno Tahoe's Target Audience. 1,829 completed surveys.

Reno Tahoe’s target audience and outdoor enthusiasts do not yet fully appreciate the destination’s après offerings

There is potential for improvement as Reno Tahoe continues to reinforce its position as the ultimate urban basecamp to the target audience and outdoor adventurers. Agreement that Reno Tahoe delivers on various après attributes is higher among those who appreciate the destination’s non-outdoor offerings, showing potential and opportunity for growth.

Agreement that Reno Tahoe Delivers Destination Après Attributes Among Different Groups (% of each group agreeing that Reno Tahoe delivers on the attribute)




The term “Appreciators” refers to respondents who agree that Reno Tahoe delivers on that particular attribute.

Question: For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not.
 Base: Reno Tahoe’s Target Audience: 1,829 completed surveys.
 Outdoor Rec Appreciators: 1,340. Water Activities Appreciators: 1,169. Winter Sports Appreciators: 1,166.

Those who perceive Reno Tahoe as a strong outdoor activity hub acknowledge the strength of its après attributes at a higher rate than the overall target audience, but much less than those who appreciate other attributes of the destination. More details on the next slide.

Reno Tahoe “Après Attribute” Perception Correlations*

Attribute Being Rated 

This table presents Reno Tahoe ratings on attributes associated with nightlife or the “après” (post-activity, traditionally skiing) component of an urban basecamp image. The listed attributes with percentages in parentheses (e.g., “Golf (75%)” highlighted as an example) represent target travelers who indicated agreement that Reno Tahoe delivers that attribute. So, in the case of Golf (75%), this indicates that among those who perceive Reno Tahoe as delivering on Golf, 75 percent of them agree that Reno Tahoe delivers on nightlife scene.

Outdoor activities are highlighted in blue, dark blue for outdoor recreation.

*Note – These are not technically statistical correlations, but they are indicative of the overlap between those who view different attributes of Reno Tahoe favorably and those who view Reno Tahoe favorably in terms of “urban basecamp” attributes.

Nightlife Scene Ratings	Fine Dining Ratings	Live Music (Ratings)	Breweries/Craft Beer Ratings
Nightlife scene (100%)	Fine dining (100%)	Live music (100%)	Breweries/craft beer (100%)
Pro sporting events (85%)	Performing arts (82%)	Performing arts (85%)	Museums/galleries (81%)
Performing arts (85%)	Museums/galleries (81%)	Museums/galleries (82%)	Performing arts (80%)
Museums/galleries (84%)	Pro sporting events (80%)	Pro sporting events (81%)	Pro sporting events (80%)
Live music (81%)	Unique local cuisine (79%)	Malls/brand stores (76%)	Sustainable practices (78%)
Malls/brand stores (80%)	Live music (78%)	Special events/festivals (74%)	Malls/brand stores (75%)
Boutiques/artisans (78%)	Sustainable practices (78%)	Sustainable practices (74%)	Unique local cuisine (74%)
Unique local cuisine (76%)	Malls/brand stores (77%)	Easily accessible (73%)	Live music (73%)
Breweries/craft beer (76%)	Boutiques/artisans (77%)	Unique local cuisine (73%)	Boutiques/artisans (73%)
Special events/festivals (75%)	Special events/festivals (76%)	Boutiques/artisans (72%)	Special events/festivals (72%)
Fine dining (75%)	Breweries/craft beer (75%)	Nightlife scene (72%)	Easily accessible (70%)
Golf (75%)	Easily accessible (75%)	Breweries/craft beer (71%)	Good value for money (70%)
Easily accessible (75%)	Nightlife scene (74%)	Fine dining (70%)	Nightlife scene (69%)
Sustainable practices (73%)	Spas/wellness activities (74%)	Golf (70%)	Golf (69%)
Good value for money (73%)	Golf (74%)	Good value for money (69%)	Fine dining (69%)
Spas/wellness activities (71%)	Good value for money (72%)	Spas/wellness activities (66%)	Spas/wellness activities (67%)
Inclusive/welcoming (69%)	Inclusive/welcoming (70%)	Inclusive/welcoming (66%)	Inclusive/welcoming (66%)
Short-term rentals (67%)	Short-term rentals (69%)	Short-term rentals (63%)	Short-term rentals (65%)
Gambling/casinos (66%)	IG-worthy experiences (68%)	Family-friendly (61%)	Family-friendly (64%)
IG-worthy experiences (65%)	Family-friendly (67%)	IG-worthy experiences (61%)	IG-worthy experiences (64%)
Family-friendly (64%)	Water access (63%)	Water activities (57%)	Water activities (60%)
Water activities (61%)	Water activities (63%)	Gambling/casinos (57%)	Water access (59%)
Water access (61%)	Winter sports (62%)	Water access (57%)	Winter sports (58%)
Winter sports (61%)	Gambling/casinos (62%)	Winter sports (55%)	Gambling/casinos (57%)
Outdoor recreation (60%)	Outdoor recreation (61%)	Outdoor recreation (55%)	Outdoor recreation (57%)
Target Audience (53%)	Target Audience (53%)	Target Audience (47%)	Target Audience (48%)

Question: For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not. Base: Target audience. 1,829 completed surveys. “IG” means Instagram.

Reno Tahoe’s “vibrant and fun atmosphere” is the brand sentiment that rings true most, in general and across segments of interest

The brand identifier that resonates most after that is spirit of independence, trailing the fun atmosphere by 5 points (58%) for the whole audience, but following more closely among Recent Visitors, Ambitious Adventurers, and Cultured Creatives. Lapsed Visitors report the biggest gap between Reno’s vibrant and fun atmosphere (64%) and spirit of independence (56%) while those who’ve never visited are least likely to agree that Reno Tahoe has a vibrant atmosphere, spirit of independence, or allows you to live life to its fullest. Among groups, Ambitious Adventurers agree most with all brand sentiments, from rates of 80% (sophistication & edginess) to nearly 9 in 10 (88%; vibrant atmosphere).

Brand Sentiment Resonance:
 (% of Group Agreeing that each Statement Describes Reno Tahoe by Segment)

Reno Tahoe...	Target Audience	Recent Visitor	Lapsed Visitor	Never Visited	Ambitious Adventurer	Cultured Creative	Mindful Mom
Has a vibrant and fun atmosphere	63%	84%	64%	59%	88%	81%	69%
Has a spirit of independence	58%	82%	56%	53%	86%	79%	64%
Is a place where you can live life to its fullest	57%	78%	57%	53%	85%	75%	64%
Celebrates individuality and the unconventional	50%	74%	44%	46%	84%	72%	60%
Is a fusion of sophistication and edginess	47%	74%	41%	42%	80%	71%	56%

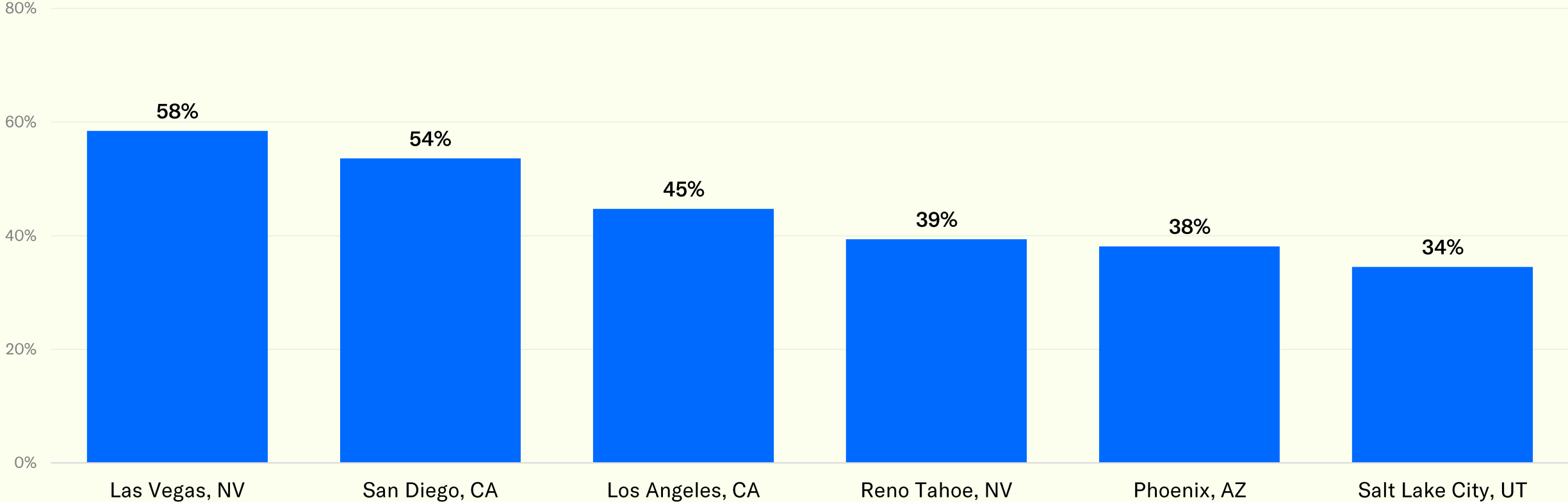
Question: For each option below, please select how much you agree or disagree that it describes Reno Tahoe, whether you have been before or not.
 Base: Target Audience. 1,829 completed surveys. Ambitious Adventurer: 380 completed surveys. Cultured Creative: 572 completed surveys. Mindful Mom: 394 completed surveys.

Detailed Findings: Reno Tahoe's Competitive Position

Reno Tahoe holds mid-tier appeal among competitors

Interest in visiting Reno Tahoe in the next two years (39%) mirrors that of Phoenix (38%), demonstrating mid-tier appeal within the competitive set. However, Reno Tahoe trails major destinations like Las Vegas (58%), San Diego (54%), and Los Angeles (45%). While outpacing Salt Lake City (34%), Reno Tahoe has room to enhance its attractiveness and boost its position among travelers' choices.

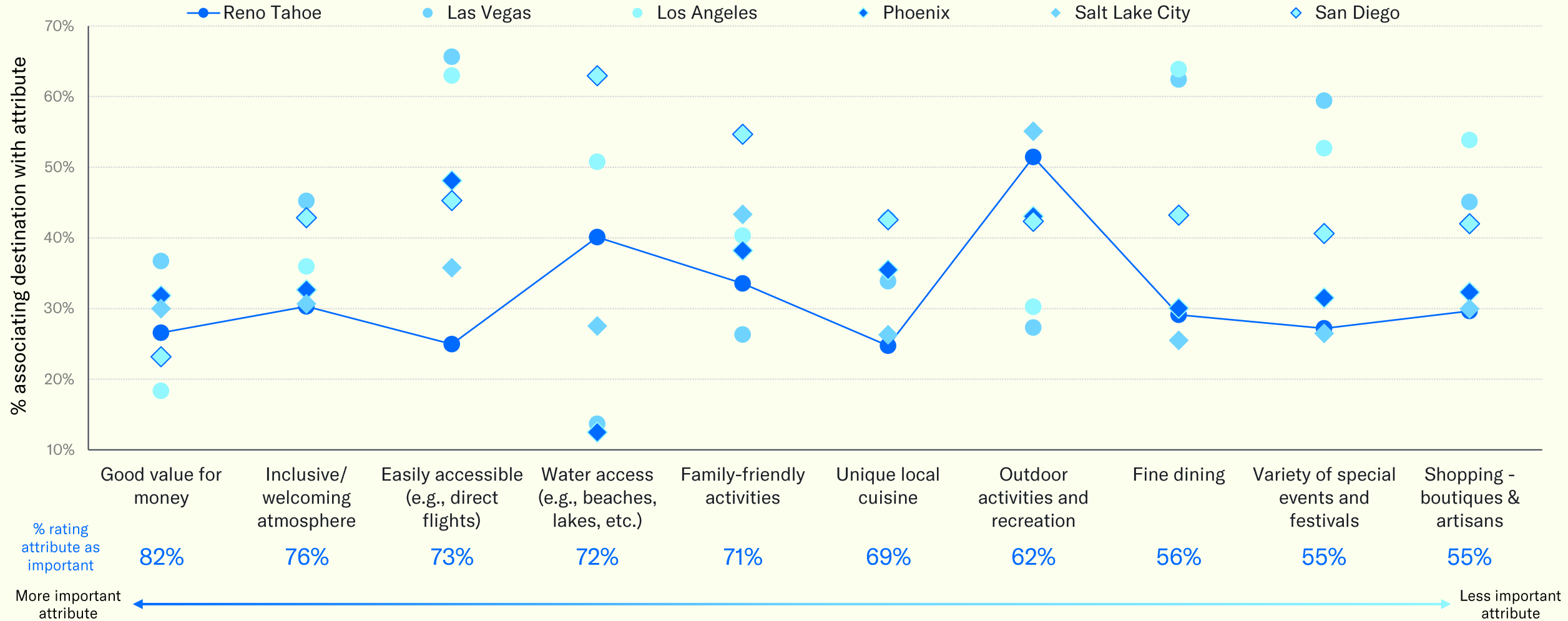
Interest in Visiting Reno Tahoe and Competitors in the Next Two Years
(% Selecting Each Destination)



Question: Which of the following destinations are you interested in visiting in the next two years?
Base: Total target audience. 1,829 completed surveys.

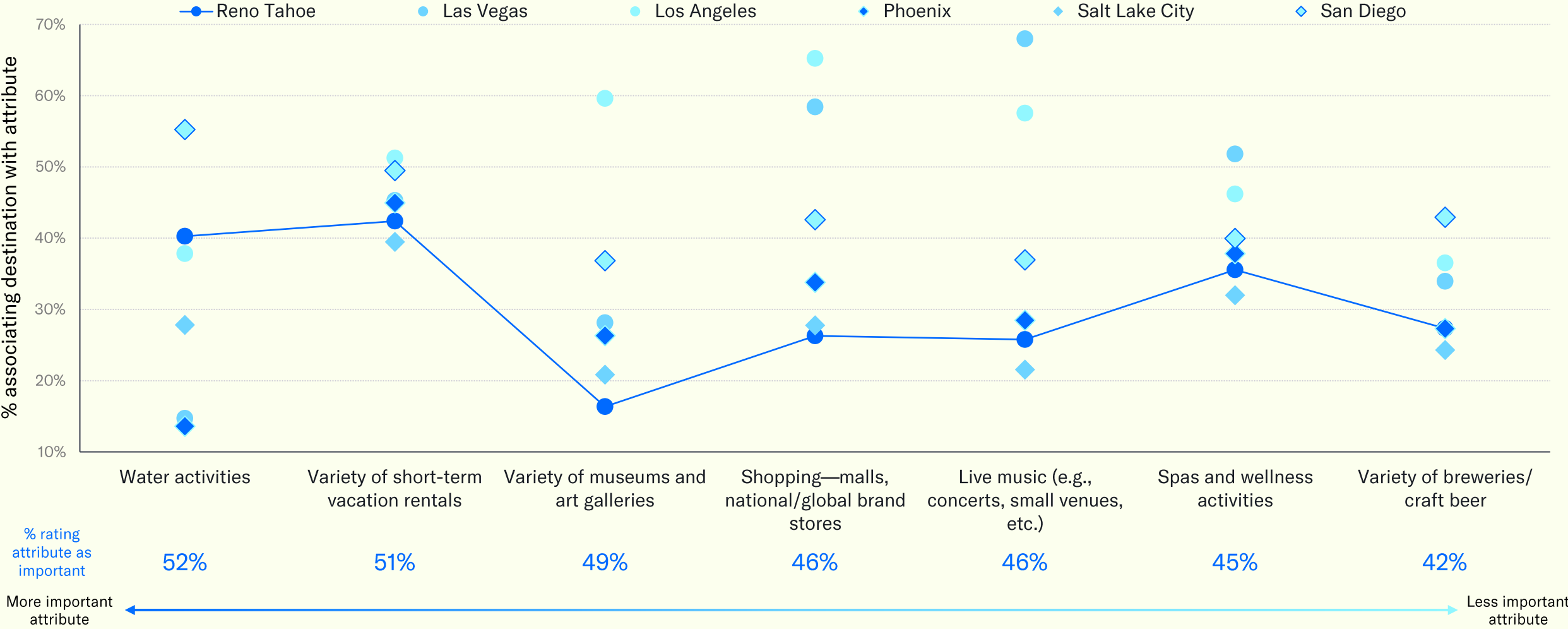
Reno Tahoe's relative strengths among competitors are outdoor activities and recreation and water access; opportunities include travel accessibility and unique local cuisine

Competitive Standing on Top 10 Most Important Destination Attributes

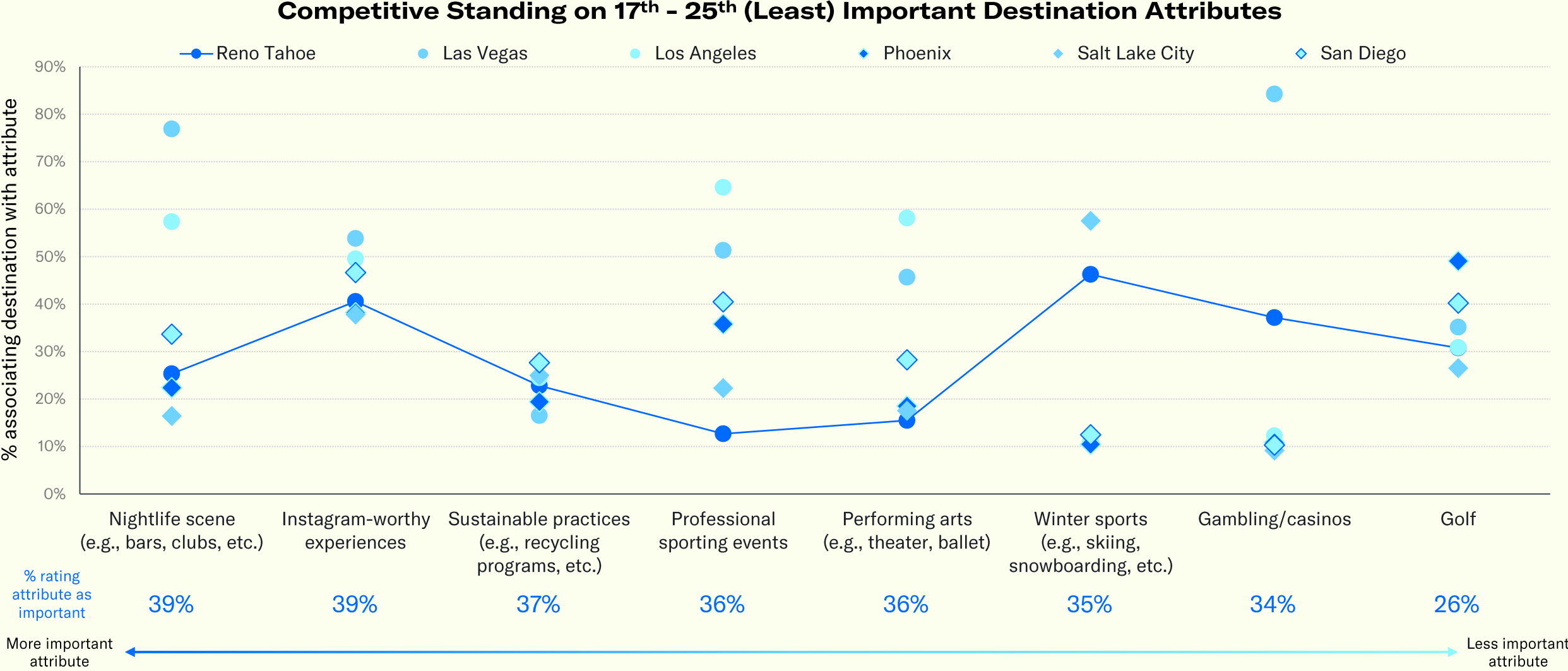


Among the destination attributes that fall in the middle in terms of importance, Reno Tahoe ranks high amidst competitors in water activities, surpassed only by San Diego

Competitive Standing on 11th - 16th Most Important Destination Attributes



Among destination attributes that are important to smaller shares of travelers and thus are “least important,” Reno Tahoe excels in winter sports and in gambling, where it lags behind only Vegas



Destination Attribute Rating by Competitors among Target Travelers

This table presents competitive position information from the previous three charts in a table format.

Note that the attributes are listed in order of importance to the target audience.

Importance refers to the percent of the target audience who rated the attribute as highly important to them when selecting a vacation destination (i.e., rated as a 4 or 5 on a scale of 1 (not at all important) to 5 (extremely important)).

More important



Less important

Attribute	Reno Tahoe	Las Vegas	Los Angeles	Phoenix	Salt Lake City	San Diego
Good value for money	26.6%	36.7%	18.3%	31.8%	30.0%	23.2%
Inclusive/ welcoming atmosphere	30.3%	45.2%	36.0%	32.6%	30.7%	42.9%
Easily accessible (e.g., direct flights)	25.0%	65.6%	63.0%	48.1%	35.8%	45.3%
Water access (e.g., beaches, lakes, rivers, etc.)	40.1%	13.7%	50.8%	12.5%	27.5%	63.0%
Family-friendly activities	33.6%	26.3%	40.3%	38.2%	43.3%	54.7%
Unique local cuisine	24.7%	33.9%	42.7%	35.5%	26.3%	42.6%
Outdoor activities and recreation	51.4%	27.3%	30.2%	43.1%	55.1%	42.3%
Fine dining	29.1%	62.4%	63.9%	30.0%	25.5%	43.2%
Variety of special events and festivals	27.2%	59.4%	52.7%	31.5%	26.5%	40.6%
Shopping—unique boutiques and local artisans	29.6%	45.1%	53.9%	32.3%	29.9%	42.0%
Water activities (e.g., paddle boarding, kayaking)	40.3%	14.7%	37.8%	13.6%	27.8%	55.2%
Variety of short-term vacation rentals	42.4%	45.3%	51.2%	44.9%	39.5%	49.5%
Variety of museums and art galleries	16.3%	28.1%	59.6%	26.3%	20.8%	36.8%
Shopping—malls, national/global brand stores	26.3%	58.4%	65.2%	33.8%	27.8%	42.6%
Live music (e.g., concerts, small venues, etc.)	25.8%	68.0%	57.6%	28.5%	21.5%	36.9%
Spas and wellness activities	35.6%	51.8%	46.2%	37.8%	32.0%	40.0%
Variety of breweries/ craft beer	27.3%	33.9%	36.5%	27.3%	24.3%	42.9%
Nightlife scene (e.g., bars, clubs, etc.)	25.3%	76.9%	57.4%	22.4%	16.4%	33.7%
Instagram-worthy experiences	40.6%	53.8%	49.5%	38.2%	37.8%	46.6%
Sustainable practices (e.g., Leave No Trace)	22.8%	16.5%	24.5%	19.4%	25.0%	27.7%
Professional sporting events	12.7%	51.3%	64.6%	35.8%	22.3%	40.5%
Performing arts (e.g., theater, ballet, etc.)	15.5%	45.7%	58.1%	18.5%	17.5%	28.3%
Winter sports (e.g., skiing, snowboarding, etc.)	46.2%	10.9%	10.7%	10.5%	57.5%	12.5%
Gambling/casinos	37.2%	84.3%	12.3%	10.8%	9.2%	10.3%
Golf	30.8%	35.2%	30.9%	49.1%	26.5%	40.2%

Reno Tahoe is a silver medalist in its core strengths, rated above most of its competitors in outdoor activities and gaming

Among Reno Tahoe’s top comparative strengths (that is, attributes it was most frequently selected as reflecting within the context of a competitor set), the destination does not rank as #1 in its competitor set in any. However, it stands in 2nd place in its key strengths: outdoor activities and recreation (51% selecting Reno Tahoe after #1 Salt Lake City 55%), winter sports (46% Reno Tahoe, 58% SLC), water activities (40% Reno Tahoe, 55% San Diego), and gambling/casinos (37% Reno Tahoe, 84% Las Vegas).

Reno Tahoe’s Top 10 Attributes, as Selected in the Context of a Competitor Set

(% Selecting the Column City as Reflecting the Row Attribute; Highlighted Cells Indicate the Highest Percentage/Top-Rated Destination for Each Attribute)

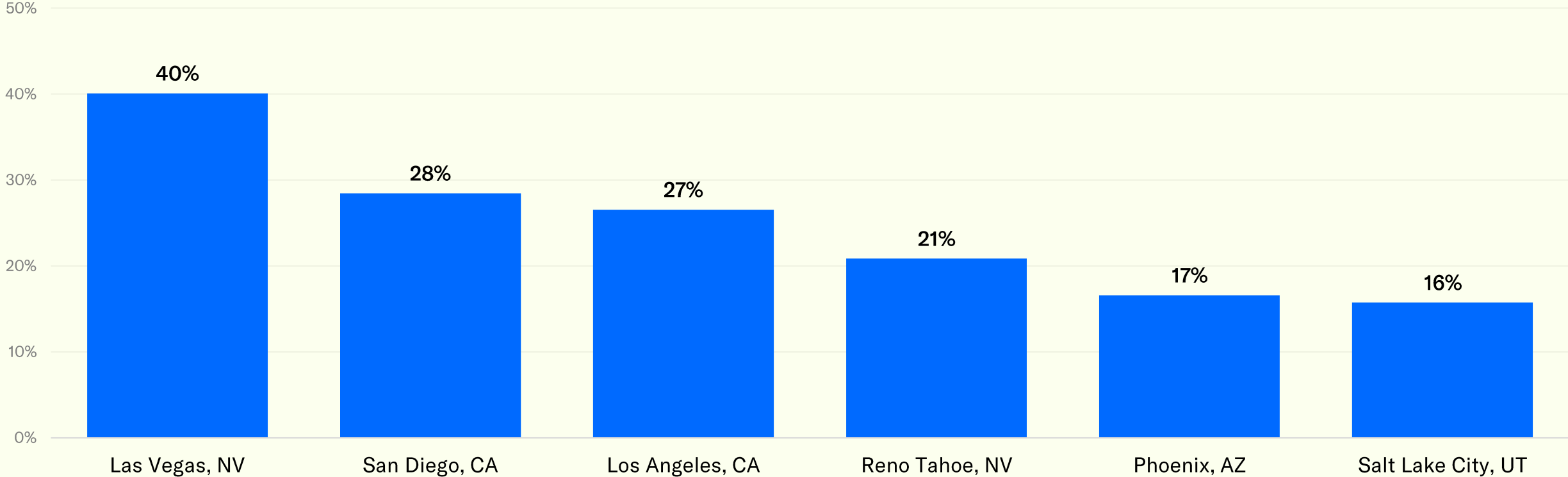
Rank among Reno Tahoe Attributes	Attribute	Reno Tahoe (Rank among competitors)	San Diego	Phoenix	Las Vegas	Salt Lake City	Los Angeles
1	Outdoor activities and recreation	51% (2 nd)	42%	43%	27%	55%	30%
2	Winter sports	46% (2 nd)	12%	10%	11%	58%	11%
3	Variety of short-term vacation rentals	42% (5 th)	49%	45%	45%	39%	51%
4	Instagram-worthy experiences	41% (4 th)	47%	38%	54%	38%	50%
5	Water activities	40% (2 nd)	55%	14%	15%	28%	38%
6	Water access	40% (3 rd)	63%	12%	14%	28%	51%
7	Gambling/casinos	37% (2 nd)	10%	11%	84%	9%	12%
8	Spas and wellness activities	36% (5 th)	40%	38%	52%	32%	46%
9	Family-friendly activities	34% (5 th)	55%	38%	26%	43%	40%
10	Golf	31% (4 th)	40%	49%	35%	27%	31%

Question: For each attribute below, please select which destination(s) most closely reflects the attribute, whether you have been before or not. Table shows % selecting the column destination as reflecting the row attribute.. Base: Target audience. 1,829 completed surveys.

Reno Tahoe outpaces key rivals in near-term travel intent among its target audience, with room to grow

Reno Tahoe demonstrates competitive strength, surpassing Phoenix (17 percent of travelers selecting) and Salt Lake City (16%) in the target audience's 12-month travel plans. While it trails top destinations Las Vegas (40%), San Diego (28%), and Los Angeles (27%), it still holds an advantage over those two key competitors. This suggests an opportunity to capture a larger share of imminent travel decisions, closing the gap with the major cities.

Intent to Visit Reno Tahoe and Competitors in the Next 12 Months
(% Selecting Each Destination)



Question: Which of the following destinations are you planning to visit in the next 12 months? Select all that apply.
Base: Total target audience. 1,829 completed surveys.



Detailed Findings on Ad Effectiveness

Detailed Findings: Advertising Awareness

Advertising Awareness and Efficacy: Segment Definitions

In these final three sections of the report, we will use terminology to easily describe segmentations by which we will present data in order to illuminate the effectiveness of advertising and marketing efforts.

IMC Aware – Travelers who have, in the past twelve months, encountered or engaged with Reno Tahoe’s brand through an “integrated marketing campaign”, including owned (website or social media accounts), earned (news stories, articles, or blogs – not sponsored), and paid media (ads, sponsored social media content, sponsored articles, etc.).

IMC Unaware – Travelers who have not experienced the above in the past twelve months.

Paid Aware – Travelers who have seen advertisements, sponsored social media posts, billboards, and/or sponsored articles paid for by Reno Tahoe in the past six months.

Paid Unaware – Travelers who have not seen paid promotional materials from Reno Tahoe in the past six months.

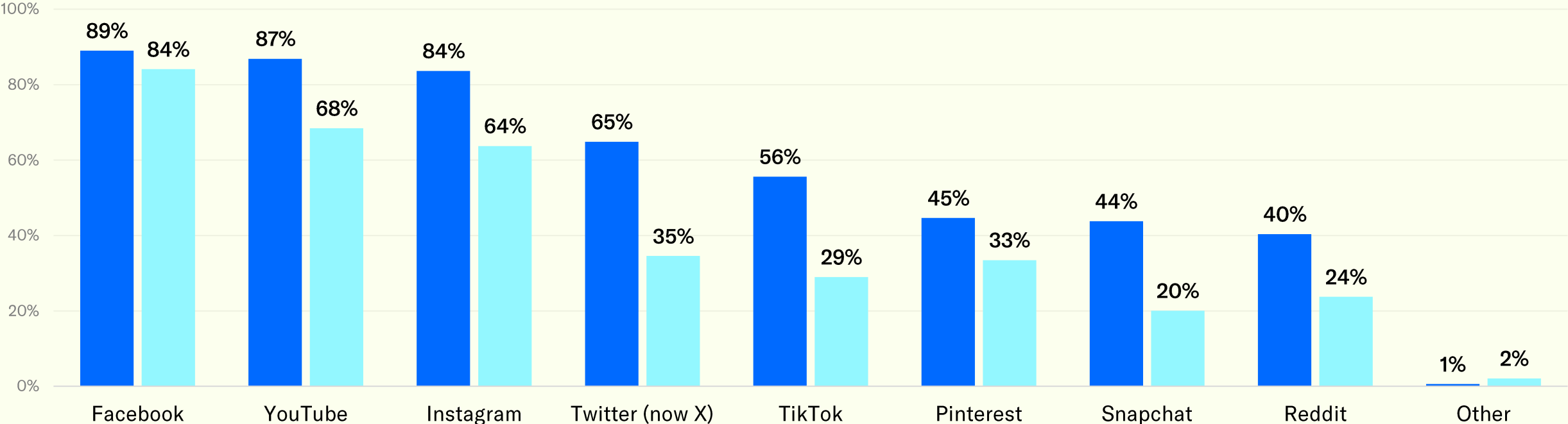


Target travelers who have seen any of Reno Tahoe’s Integrated Marketing Campaign use all social media platforms at a higher rate than others, especially X/Twitter and TikTok

With the exception of Facebook, there are significant discrepancies in usage of different social media platforms between target travelers who had previously seen any of Reno Tahoe’s IMC content, and those who had not. The gaps are largest for X/Twitter, which 2 in 3 (65%) IMC aware travelers use compared to only about 1 in 3 (35%) of those who have not, and TikTok, where the usage rate among IMC aware travelers is, similarly, nearly double that seen among ICM unaware travelers (56% vs. 29%, respectively).

Social Media Platform Usage

■ IMC Aware ■ IMC Unaware

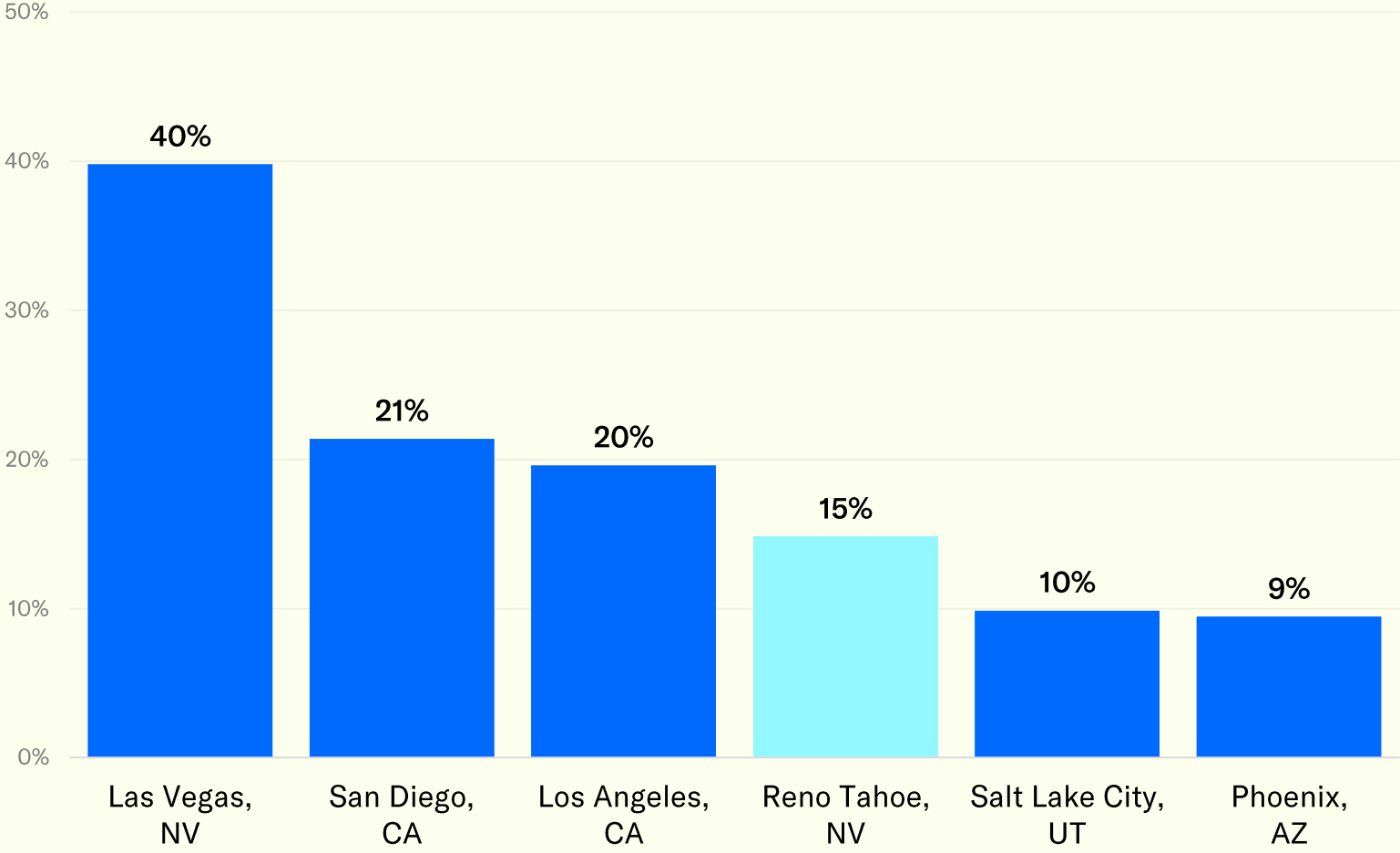


Question: Which social media platforms do you typically use? Select all that apply. Columns represent percent of group indicating that they typically use the channel.
Base: IMC Aware: Respondents who had come across Reno Tahoe’s Integrated Marketing Campaign prior to survey and who use social media: 649 completed surveys.
IMC Unaware: Respondents who had NOT come across Reno Tahoe’s Integrated Marketing Campaign prior to survey and who use social media: 1,119 completed surveys.

Reno Tahoe advertisements leave a positive impression, and there is an opportunity to further expand campaign reach

About 1 in 7 (15%) target travelers recall seeing any Reno Tahoe advertisements in the past 12 months, outpacing Salt Lake City (10%) and major metropolis Phoenix (9%). Still, Reno Tahoe's ad visibility significantly lags behind that of Las Vegas (40%), which maintains double the share of recall relative to the next leading competitor, San Diego (21%). This suggests a need to increase Reno Tahoe's marketing reach to gain a competitive share of attention.

Unaided Advertising Recall by Destination
(% Recalling Seeing Ads for Each Destination)



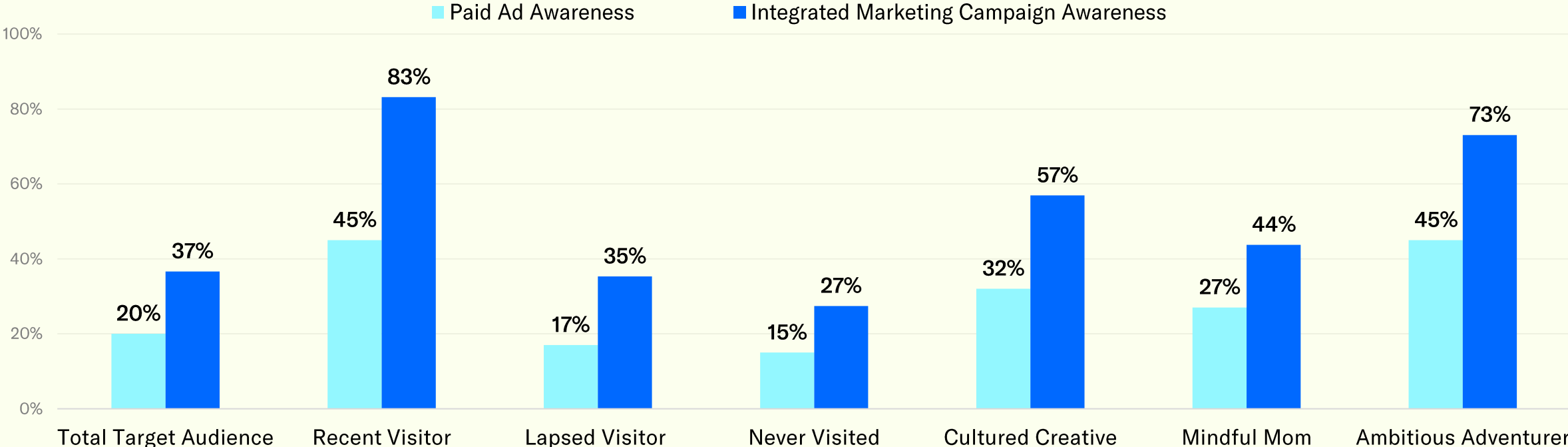
Question: In the past 12 months, do you recall seeing any advertisements for any of the following destinations?
Base: Target audience. 1,829 completed surveys.

Reno Tahoe’s integrated marketing campaign content significantly boosts reach

The reach of Reno Tahoe's integrated marketing campaign (IMC) significantly exceeds that of paid advertising alone: While 1 in 5 target travelers have seen paid media, an additional 17 percent have encountered owned and earned media. Importantly, the additional reach is especially pronounced among recent visitors, with 83% having engaged with IMC content in the past year vs. 45% who have seen paid ads in the past six months. While paid media remains effective at reaching key segments (seen by 45% of Ambitious Adventurers and 32% of Cultured Creatives), IMC significantly strengthens engagement across the board, suggesting that a well-rounded marketing strategy combining paid and owned/earned media is crucial for maximizing visibility and engagement.

Marketing Content Exposure – Paid Media vs. Integrated Marketing Campaign

(% Indicating Having Seen Paid Promotional Content [Paid Ads] or Having Seen or Interacted with Owned, Earned, or Paid Promotional Content for Reno Tahoe [Integrated Marketing Campaign])

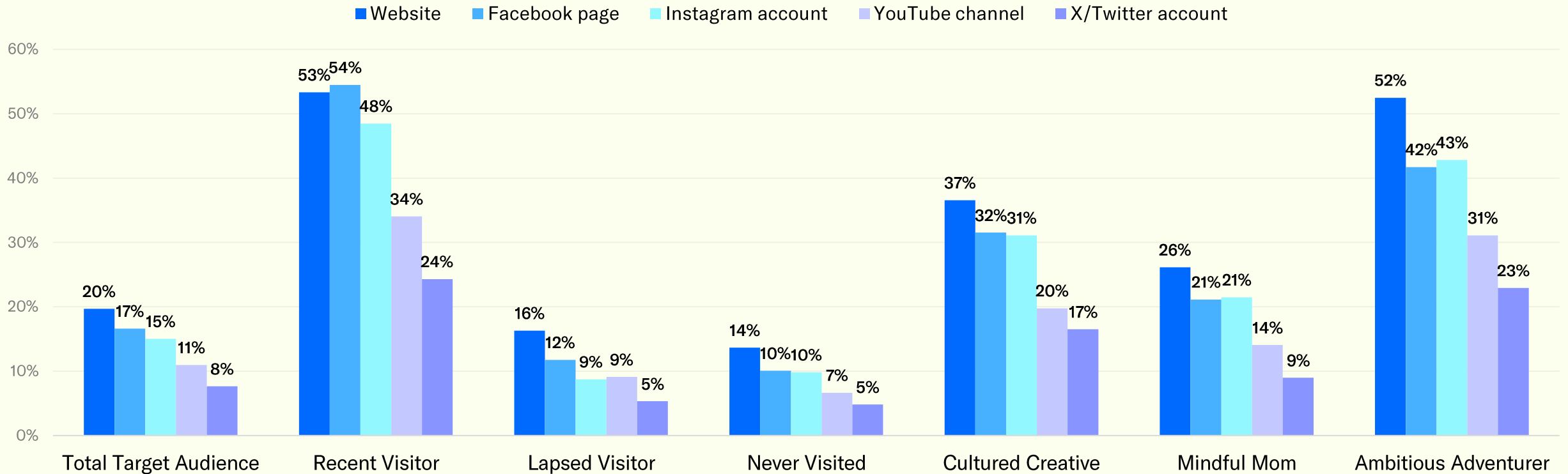


Questions: **PaidAdRecall:** Have you seen these or similar ads, sponsored social media posts, billboards, and/or articles for Reno Tahoe in the past 6 months? **EarnedRecall:** In the past 12 months, do you recall seeing any news stories, articles, or blogs about travel to Reno Tahoe? **OwnedRecall:** In the past 12 months, have you visited any of the following? Select all that apply. (Reno Tahoe Website, Facebook, etc. Owned Channels).
 Base: Target audience. 1,829 completed surveys.

One in five target travelers has visited Reno Tahoe's website in the past year, making it the most commonly frequented owned channel, followed by Facebook and then Instagram

Ambitious Adventurers have engaged most with Reno Tahoe's owned channels, with over half having visited the website and 4 in 10 either encountering or actively visiting its Facebook or Instagram. This segment also exhibits high non-paid ad recall (reporting a 28% disparity between IMC and Paid), stronger interest, and greater intent to visit. These findings coalesce to suggest that social media is effective in inspiring potential travelers, especially among Ambitious Adventurers and, to a lesser extent, Cultured Creatives. The high past-year contact among recent visitors also shows that social media is effectively being leveraged to maintain a connection with past visitors.

Reno Tahoe Owned Channel Awareness

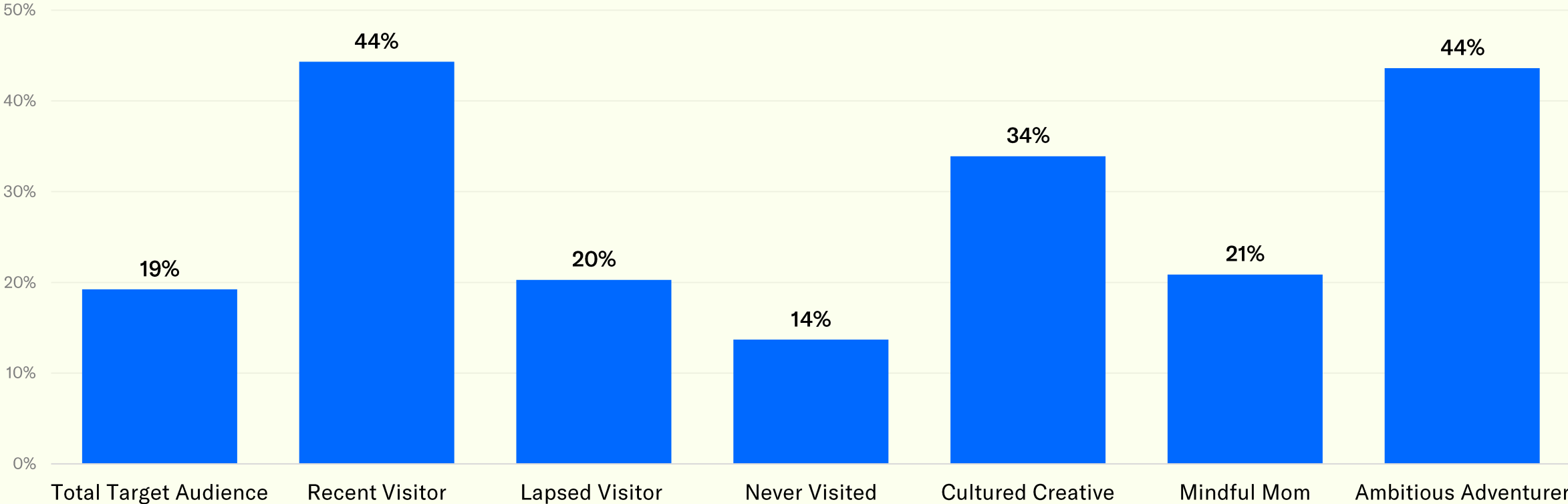


Question: In the past 12 months, have you seen/been to any of the following? Columns represent percent selecting.
 Base: Target audience. 1,829 completed surveys.

Earned media generates buzz for Reno Tahoe, with room to inspire more coverage

Earned media coverage significantly boosts awareness of Reno Tahoe, especially among recent visitors (44%) and the Ambitious Adventurer segment (44%). This positive coverage extends to other segments, including Cultured Creatives (34%) and Mindful Moms (21%). While overall target audience recall remains at 19%, these higher rates among recent visitors, and key personas suggest that earned media plays a role in fostering engagement and positive perceptions of Reno Tahoe.

Reno Tahoe Earned Media Awareness



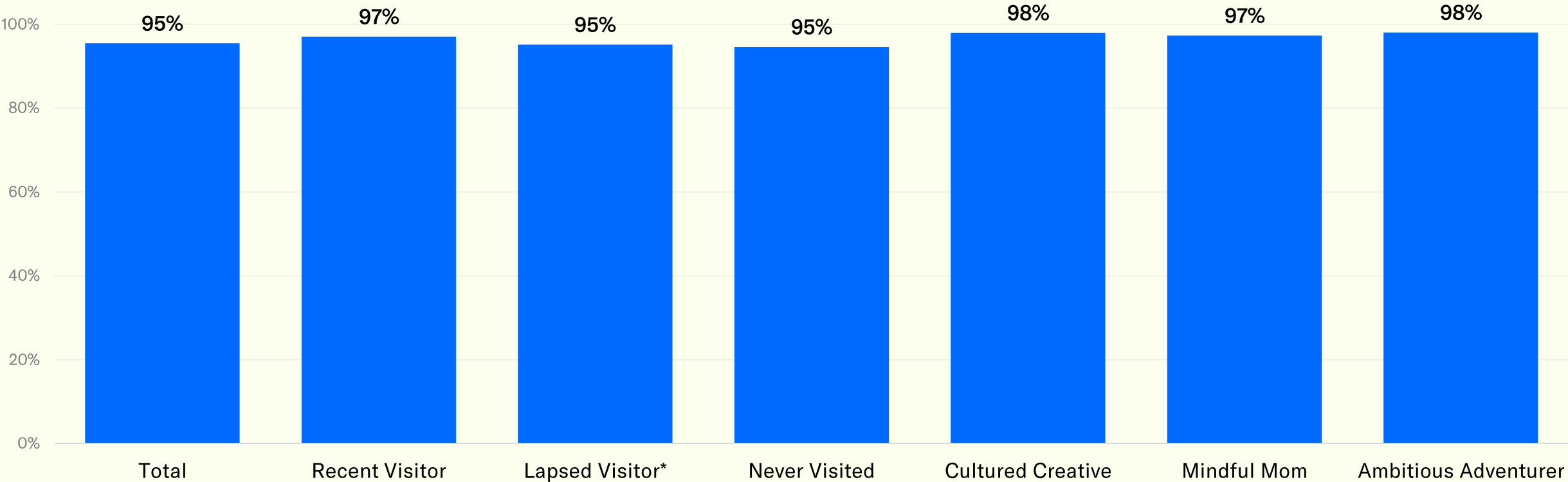
Question: In the past 12 months, do you recall seeing any news stories, articles, or blogs about travel to Reno Tahoe? Columns represent percent responding “yes.”
Base: Target audience. 1,829 completed surveys.

Detailed Findings: Direct Impact of Paid Advertising

Reno Tahoe’s paid ads were effective in portraying Reno Tahoe as an enjoyable leisure destination

Nearly all paid media aware travelers surveyed reported that the Reno-Tahoe ads were “somewhat” or “very” effective in communicating the destination as a place they would enjoy visiting for leisure (95%), with the Cultured Creative (98%) and Ambitious Adventurer (98%) segments reporting the relatively highest efficacy.

Effectiveness of Reno Tahoe’s Paid Advertisements (Top 2 Box)
(% Selecting “Somewhat Effective” or “very effective”)



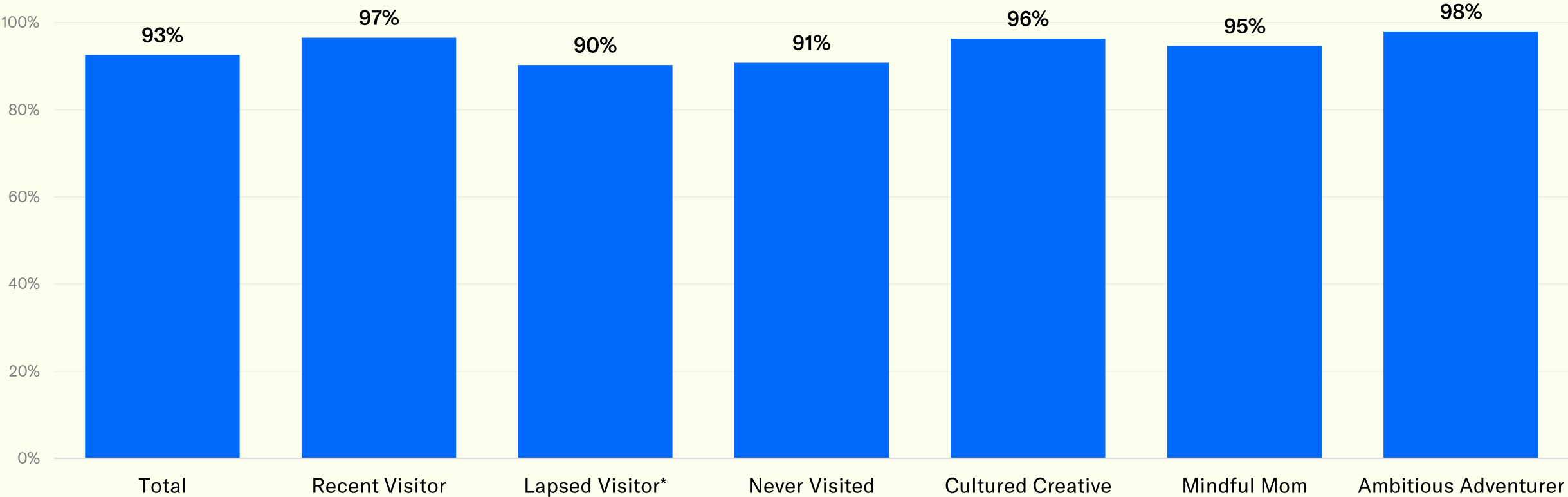
Question: How effective were the ads in portraying Reno Tahoe as a place you would enjoy visiting for leisure?
Base: Paid media aware, 370 completed surveys.
* Sample size <100

The ad campaign was well-liked

In total, 93 percent of paid media aware travelers said that they “somewhat” or “very much” liked the ads. Amongst the segments, recent visitors (97%) and Ambitious Adventurers (98%) were most likely to report liking the ads.

Likeability of Reno Tahoe’s Paid Advertisements

(% Selecting “Liked Somewhat” or “Liked Very Much”)



Question: How much did you like or dislike these ads? Columns represent percent selecting “liked somewhat” or “liked very much.”

Base: Paid media aware, 370 completed surveys.

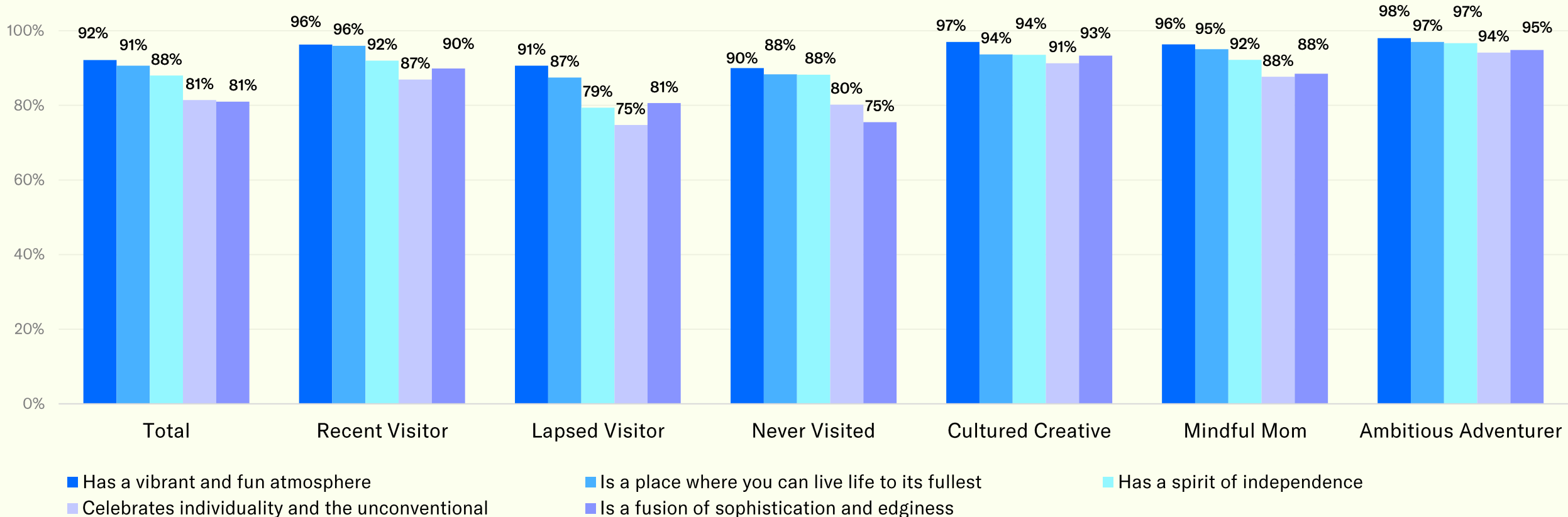
*Sample size <100

The ad campaign successfully depicts Reno Tahoe as a destination with a fun atmosphere and where one can “live life to its fullest”

Nine-in-ten travelers agreed that the ads portrayed Reno Tahoe as a place that “has a vibrant and fun atmosphere” and where one can “live life to its fullest.” Though still high at 81 percent, there was relatively less agreement that the ad campaign “celebrates individuality” and “is a fusion of sophistication and edginess.”

Advertising’s Successful Portrayal of Reno Tahoe’s Brand Attributes (Top 2 Box)

(% Selecting “4” or “5 – Strongly agree”)

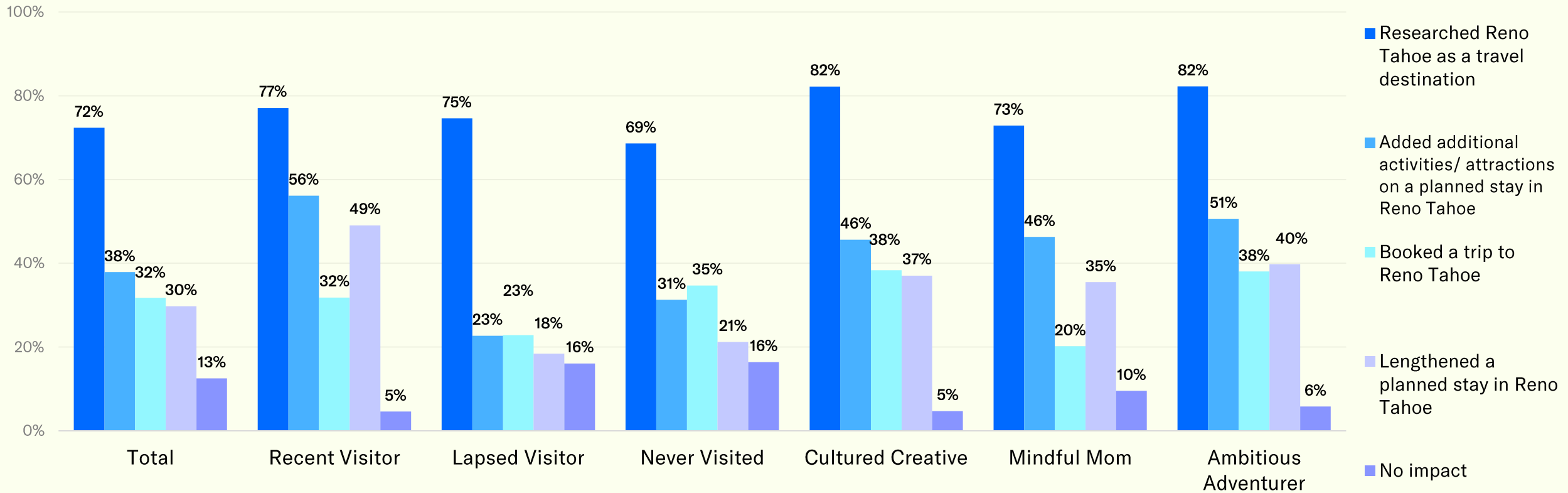


Question: In your opinion, did the ads portray Reno Tahoe as a place that...?
 Base: Paid media aware, 370 completed surveys.

A large majority of travelers researched Reno Tahoe after being exposed to the ad campaign, while 1 in 3 booked a trip

Approximately three-quarters of paid media aware travelers researched the destination after they saw an ad for Reno Tahoe (72%). The Cultured Creative (82%) and Ambitious Adventurer (82%) were the likeliest to take this action after being exposed. Meanwhile, few respondents reported that the ads they viewed had no impact (13%).

Action Taken After Seeing a Reno Tahoe Ad
(% Selecting Action)



Question: Which of the following did you do after seeing an ad for Reno Tahoe?
Base: Paid media aware, 370 completed surveys.

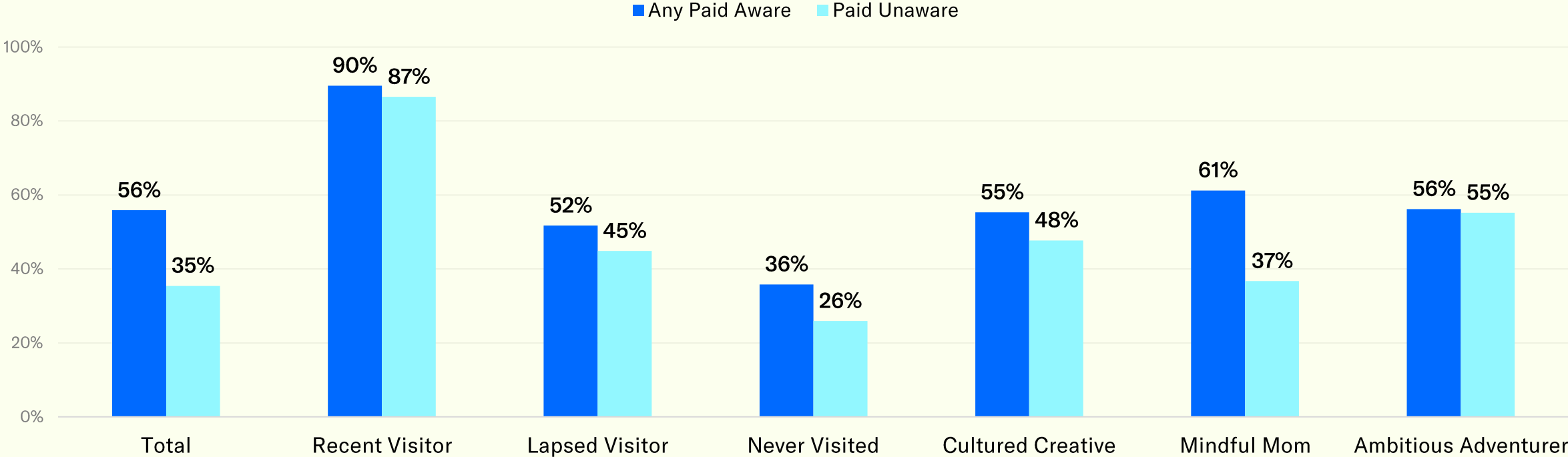
Detailed Findings: Indirect Impact of Marketing

Including Comparisons of Paid vs. Unpaid
Destination Promotion

Exposure to Reno Tahoe’s paid ads is linked to increased interest in visiting among several groups

Paid advertising may be effective in promoting Reno Tahoe as a desirable destination. While not linked to differences for recent visitors or ambitious adventurers, among lapsed visitors, ad exposure correlates with a 7-point higher interest in returning. The trend continues with those who have never visited, where ad-awareness is related to a 10-point increase in travel interest. The effect is most dramatic among Mindful Moms, among whom 6 in 10 who saw advertisements in the past 6 months are interested in visiting Reno Tahoe, compared to just over one-third (37%) of those who did not encounter the destination’s paid media.

Interest in Visiting Reno Tahoe in the Next 2 Years, by past-6-month Paid Media Exposure
(% Selecting Reno Tahoe, Nevada)

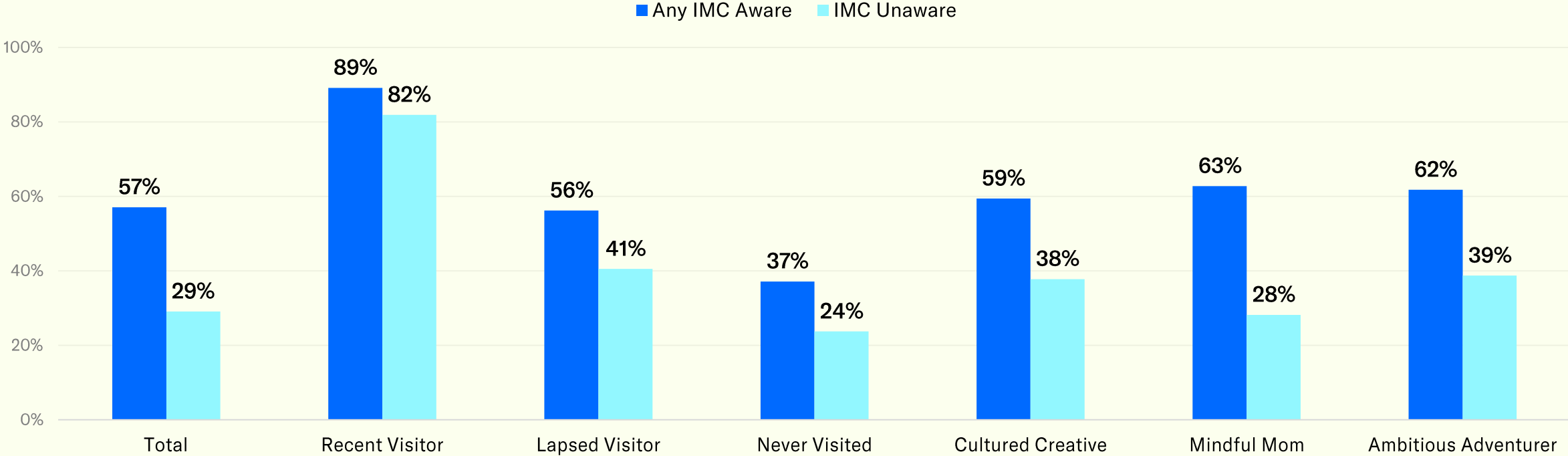


Question: Which of the following destinations are you interested in visiting in the next two years? – Reno Tahoe, NV
Base: Total. 1,829 completed surveys.

Engagement with Reno Tahoe’s IMC strongly correlates with increased interest in visiting, outpacing paid media alone

Reno Tahoe's IMC exposure shows a strong correlation with increased interest, particularly among Ambitious Adventurers. This segment exhibits a substantial 23-point increase in interest (from 40% to 63%) with IMC exposure, significantly outpacing the minimal 1-point increase seen with paid ads. Overall, IMC awareness is associated with a strong, roughly 30-point increase in interest among the target audience, basically doubling the rate of interest. This notably exceeds the 20-point increase seen with paid ad exposure, suggesting the potential for more efficient targeting and greater impact when utilizing IMC strategies versus focusing on higher-cost paid advertising channels.

Interest in Visiting Reno Tahoe in the Next 2 Years, by past-12-month IMC Engagement
 (% Selecting Reno Tahoe, Nevada)



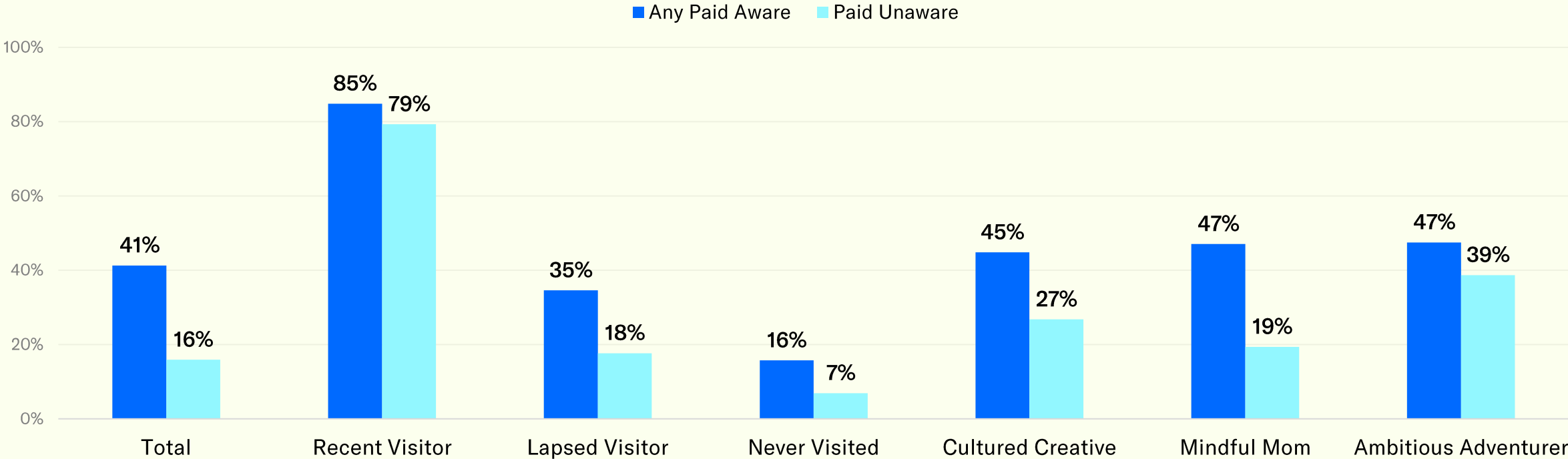
Question: Which of the following destinations are you interested in visiting in the next two years? – Reno Tahoe, NV
 Base: Total. 1,829 completed surveys.

Paid ad exposure correlates to increased intent to visit Reno Tahoe

The data illustrates a strong correlation between paid media exposure and intent to visit Reno Tahoe in the following year. Four in ten target travelers exposed to paid ads have plans to visit, a substantial increase over those not reached by paid media (16%). The highest bump among key segments is seen among Mindful Moms (28 points). However, it's essential to acknowledge that those who have seen paid ads may also engage with Reno Tahoe's unpaid media presence, which complicates attributing any outcomes solely to paid media influence. Still, 32% of those exposed to paid media reported booking a trip to Reno Tahoe after seeing an ad, a fact supporting the effectiveness of paid media in motivating potential visitors, but the entwined nature of media consumption means one should be cautious in attributing visit intent to paid media alone.

Planning to Visit Reno Tahoe in the Next 12 Months, by past-6-month Paid Media Exposure

(% Selecting Reno Tahoe, Nevada)

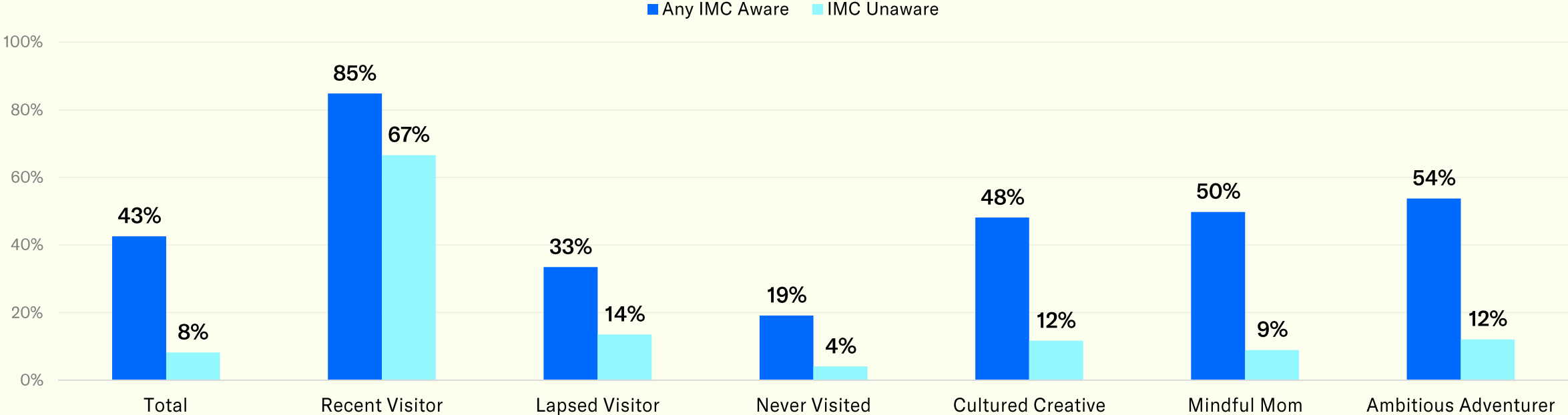


Question: Which of the following destinations are you planning to visit in the next 12 months? – Reno Tahoe, NV
Base: Total. 1,829 completed surveys.

IMC engagement is linked to even larger increases in travel intent, suggesting the integrated campaign including owned and earned channels is most impactful

Overall, IMC awareness is related to a 35-point increase, a quadrupling effect, in plans to visit in the next year. While recent visitors display a high revisit intent regardless of paid ad awareness (85% vs. 79%, see previous slide), the absence of all IMC components notably reduces intent to 67%. This trend is more pronounced in Ambitious Adventurers, among whom intent plummets from 39% for those aware of paid ads to just 12% for those who have encountered neither paid nor unpaid media. The findings suggest that, while paid media is important, a mix of earned and owned media apparently contributes heavily to converting interest into action.

Planning to Visit Reno Tahoe in the Next 12 Months, by past-12-month IMC Engagement
(% Selecting Reno Tahoe, Nevada)



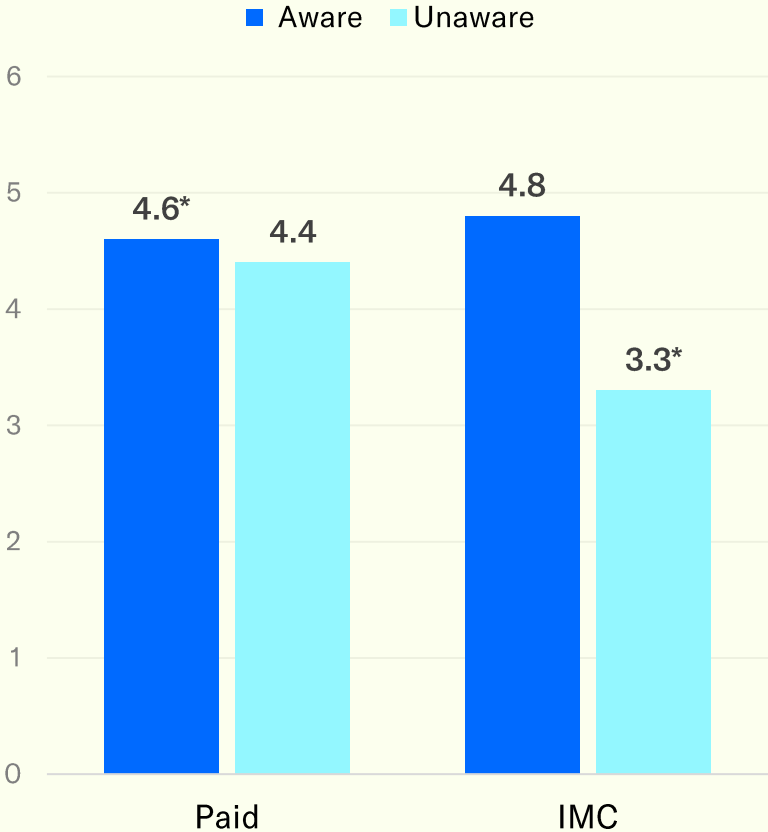
Question: Which of the following destinations are you planning to visit in the next 12 months? – Reno Tahoe, NV
Base: Total. 1,829 completed surveys.

Integrated marketing campaign awareness correlates with longer stays and higher spend

Recent visitors who had engaged with or come across integrated marketing content in the past 12 months stayed in Reno Tahoe longer (4.8 days on average) than those who had not come across IMC content (3.3 days on average). This gap of 1.5 days was larger than that seen between those who had or hadn't seen Reno Tahoe's paid ads within the past 6 months, which was small at 0.2 days. A significant amount of the paid unaware visitors, though not seeing paid promotional content, had seen or engaged with earned or owned media, underscoring the potential for IMC to outperform paid media on its own and adding more evidence that owned channels may be a more effective conduit for marketing efforts.

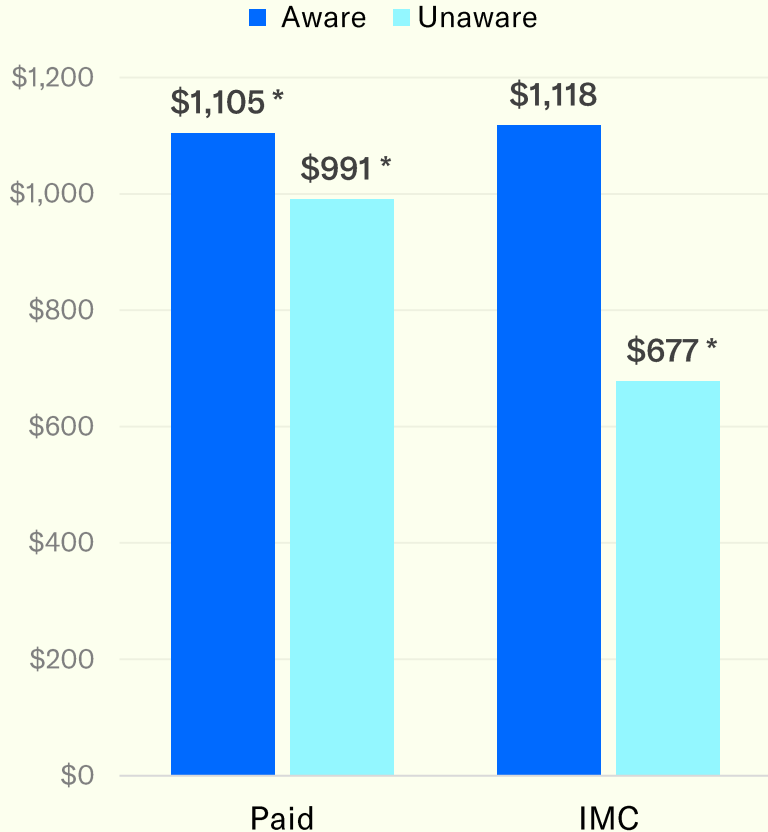
A similar trend is seen in average spend, with IMC aware visitors spending similar amounts as paid aware visitors, but IMC unaware visitors spending far less than paid unaware visitors. Paid awareness was associated with an 11% boost in daily spend (from \$991 to \$1,105) while IMC awareness was associated with a 65% boost in daily spend (\$677 to \$1,118). All in all, results suggest that additional earned and owned media make a larger difference in the most critical outcomes than paid media on its own.

Average Length of Stay
(Number of Nights)



Question: How many nights did you stay in Reno Tahoe on your last trip?
Base: Recently traveled to Reno Tahoe, 223 completed surveys.
*sample size <100; Paid Aware: 96 respondents, IMC Unaware: 40 respondents.

Average Spend Per Day



Question: On your last trip, approximately how much did you spend PER DAY in the Reno Tahoe region on each of the following categories...
Base: Recently traveled to Reno Tahoe, 164 completed surveys.
*sample size <100; Paid Aware: 69 respondents; Paid Unaware: 95 respondents; IMC Unaware: 35 respondents

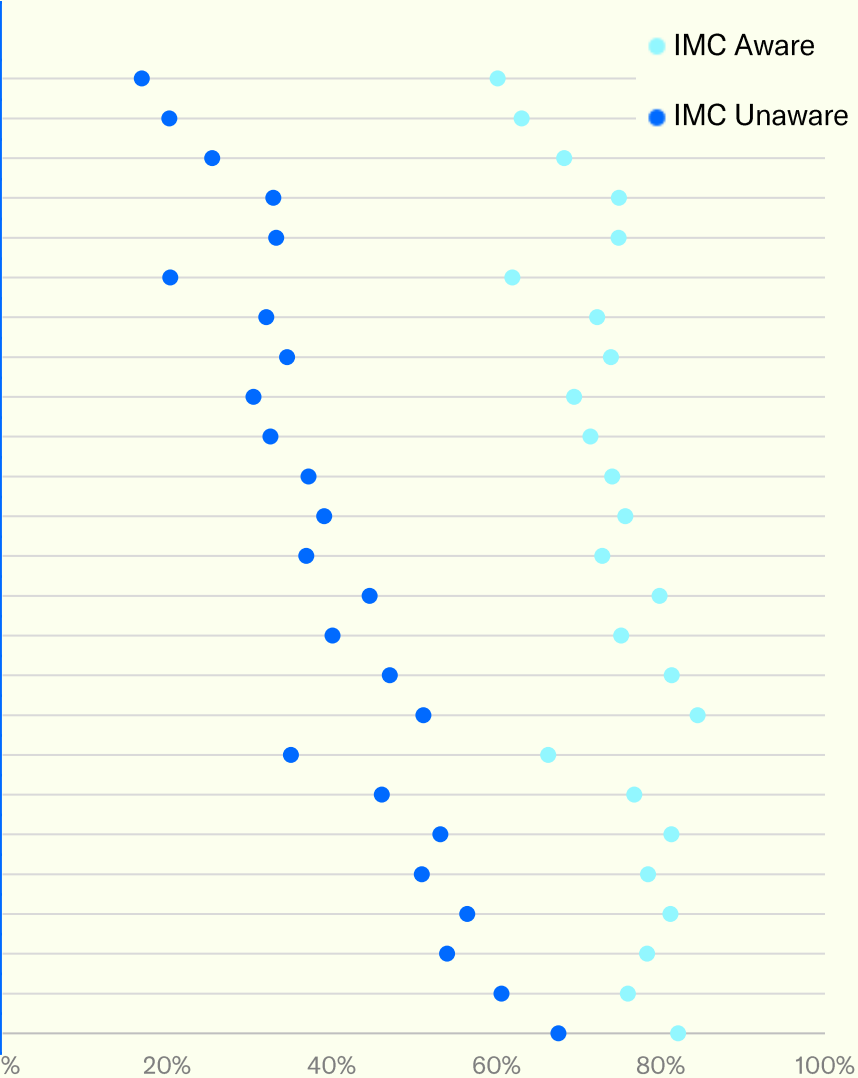
Exposure to Reno Tahoe’s IMC is linked to expanded traveler perceptions of its offerings, unveiling its versatility as a destination

Reno Tahoe's integrated marketing campaign appears to be associated with a broader, more positive perception of the destination's attributes. Those who have seen IMC content report significantly more positive views of Reno Tahoe across diverse attributes.

Most notable are the gains in non-traditional strengths, including value for money (42 percentage point gap), breweries/craft beer (42-point gap), live music (40-point gap), and family-friendly activities (33-point gap). For these attributes, Reno Tahoe is seen as strong by 75 percent or more IMC aware travelers vs. half or fewer IMC unaware travelers. Furthermore, value for money is the [most commonly prioritized](#) attribute and a critical opportunity area for Reno Tahoe, according to an [attribute analysis](#).

All in all, the results suggest that integrated marketing plays a role in broadening how potential visitors perceive Reno Tahoe, moving beyond its core strengths to a more well-rounded destination image.

Destination Attributes	Gap
Professional sporting events	43%
Performing arts	43%
Sustainable practices	43%
Variety of breweries/craft beer	42%
Good value for money	42%
Variety of museums and art galleries	42%
Live music	40%
Unique local cuisine	39%
Shopping: malls, national/global brand stores	39%
Easily accessible	39%
Variety of special events and festivals	37%
Fine dining	37%
Shopping: unique boutiques/local artisans	36%
Inclusive/welcoming atmosphere	35%
Nightlife scene	35%
Variety of short-term vacation rentals	34%
Family-friendly activities	33%
Golf	31%
Spas and wellness activities	31%
Water activities	28%
Instagram-worthy experiences	28%
Water access	25%
Winter sports	24%
Gambling/casinos	15%
Outdoor activities and recreation	15%



Question: For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not. Dot placement indicates percent of each group agreeing that Reno Tahoe delivers on the attribute).
 Base: Target Audience, 1,829 completed surveys. IMC Aware: 658 completed surveys. IMC Unaware: 1,171 completed surveys.

Appendix

Travel Attitudes by Segment

Travel-Related Attitude	Total	Recent Visitor	Lapsed Visitor	Never Visited	Cultured Creative	Mindful Mom	Ambitious Adventurer
I enjoy trying new things, such as foods, experiences, and activities	88%	91%	92%	86%	100%	93%	98%
Spending time with my family and making memories is important to why I travel	85%	87%	83%	85%	90%	100%	94%
I travel to open my mind to new cultures and experiences	75%	82%	78%	72%	100%	82%	96%
I seek out exciting and stimulating experiences when I travel	74%	88%	75%	71%	93%	80%	100%
Being outside and reconnecting with nature motivates me to travel	72%	87%	71%	70%	91%	77%	97%
I prefer experiences where I can really get a sense for the essence and culture of a place	70%	81%	71%	67%	100%	77%	96%
I travel to splurge on myself	64%	77%	59%	62%	79%	69%	84%
I make an effort to support small businesses when I travel	60%	73%	57%	58%	85%	70%	91%
I prefer active time to down time on vacation	55%	80%	55%	50%	76%	61%	100%
I like to travel off the beaten path	55%	71%	56%	51%	78%	61%	86%
I make an effort to support minority-owned businesses when I travel	41%	66%	37%	37%	72%	55%	83%
I prioritize visiting places with strong sustainability initiatives	39%	66%	37%	34%	70%	46%	100%
Base N	1,829	232	395	1,202	572	394	380

Question: How much do each of the following statements describe you?
 Table shows percent of group who selected "4" or "5 – Describes me perfectly"

Travel Motivators by Segment

Motivator: I travel to...	Total	Recent Visitor	Lapsed Visitor	Never Visited	Cultured Creative	Mindful Mom	Ambitious Adventurer
Take a break from everyday life	92%	90%	93%	91%	95%	97%	97%
Explore new things	85%	89%	84%	85%	100%	93%	98%
Live life to its fullest	85%	88%	84%	84%	95%	94%	97%
Spend more quality time with my family	84%	87%	82%	84%	89%	100%	94%
Treat myself	83%	89%	85%	82%	94%	86%	96%
Rest and relax	82%	85%	82%	82%	89%	86%	92%
Feel alive and energetic	80%	89%	83%	77%	96%	88%	100%
Be entertained	79%	85%	76%	78%	93%	85%	95%
Connect with my significant other	78%	83%	79%	77%	87%	87%	93%
Try/learn new things	77%	88%	78%	74%	96%	83%	97%
Be outdoors and experience nature	73%	83%	76%	70%	88%	78%	97%
Experience other cultures	72%	82%	73%	69%	97%	79%	95%
Seek adventure	70%	84%	71%	67%	91%	78%	100%
Celebrate or mark a special occasion	70%	80%	68%	69%	84%	78%	89%
Indulge my passion for food and cuisine	69%	79%	73%	66%	92%	80%	95%
Gain knowledge of history	63%	72%	63%	61%	89%	67%	91%
Spend more time with my friends	61%	80%	59%	57%	81%	72%	90%
Engage in my hobbies	54%	77%	51%	50%	83%	62%	89%
Immerse myself in the arts	42%	65%	37%	39%	100%	54%	81%
Base N	1,829	232	395	1,202	572	394	380

Question: Why do you travel? I travel to...

Table shows percent of group who selected "4" or "5 - Describes me perfectly"

Destination Attribute Importance by Segment

[Click to Return to Overall Audience Chart](#)

Attribute	Total	Recent Visitor	Lapsed Visitor	Never Visited	Cultured Creative	Mindful Mom	Ambitious Adventurer
Good value for money	82%	89%	78%	82%	88%	90%	93%
Inclusive/ welcoming atmosphere	76%	87%	70%	75%	91%	85%	94%
Easily accessible (e.g., direct flights)	73%	81%	74%	72%	87%	79%	91%
Water access (e.g., beaches, lakes, rivers, etc.)	72%	81%	71%	70%	87%	84%	91%
Family-friendly activities	71%	84%	65%	70%	82%	100%	92%
Unique local cuisine	69%	82%	69%	67%	92%	78%	91%
Outdoor activities and recreation (e.g., hiking, mountain biking, etc.)	62%	79%	63%	59%	80%	68%	91%
Fine dining	56%	78%	52%	52%	81%	65%	92%
Variety of special events and festivals	55%	76%	52%	52%	81%	70%	89%
Shopping—unique boutiques and local artisans	55%	82%	48%	52%	83%	79%	89%
Water activities (e.g., paddle boarding, kayaking, etc.)	52%	78%	51%	47%	74%	63%	86%
Variety of short-term vacation rentals (e.g., Airbnb, VRBO)	51%	73%	46%	48%	72%	64%	86%
Variety of museums and art galleries	49%	65%	49%	46%	83%	63%	86%
Shopping—malls, national/global brand stores	46%	73%	40%	43%	68%	60%	82%
Live music (e.g., concerts, small venues, etc.)	46%	73%	46%	40%	72%	57%	83%
Spas and wellness activities	45%	74%	42%	41%	70%	61%	82%
Variety of breweries/ craft beer	42%	70%	36%	38%	67%	46%	82%
Nightlife scene (e.g., bars, clubs, etc.)	39%	71%	40%	32%	64%	43%	80%
Instagram-worthy experiences	39%	70%	35%	33%	65%	50%	80%
Sustainable practices (e.g., Leave No Trace, recycling programs, etc.)	37%	65%	33%	32%	66%	47%	83%
Professional sporting events	36%	61%	29%	33%	58%	38%	73%
Performing arts (e.g., theater, ballet, etc.)	36%	61%	29%	32%	71%	47%	73%
Winter sports (e.g., skiing, snowboarding, etc.)	35%	71%	35%	27%	61%	42%	78%
Gambling/casinos	34%	71%	32%	27%	56%	37%	73%
Golf	26%	53%	25%	20%	48%	27%	62%
Base N	1,829	232	395	1,202	572	394	380

Reno Tahoe Destination Attribute Perceptions by Segment

[Click to Return to Overall Audience Chart](#)

Attribute	Total	Recent Visitor	Lapsed Visitor	Never Visited	Cultured Creative	Mindful Mom	Ambitious Adventurer
Outdoor activities and recreation (e.g., hiking, mountain biking, etc.)	73%	88%	76%	69%	83%	78%	85%
Gambling/casinos	66%	86%	76%	60%	77%	68%	83%
Water access (e.g., beaches, lakes, rivers, etc.)	66%	85%	70%	60%	79%	70%	84%
Water activities (e.g., paddle boarding, kayaking, etc.)	64%	83%	69%	58%	77%	68%	81%
Family-friendly activities	63%	83%	61%	60%	80%	73%	88%
Winter sports (e.g., skiing, snowboarding, etc.)	63%	83%	74%	56%	75%	62%	80%
Instagram-worthy experiences	61%	77%	62%	57%	78%	72%	84%
Variety of short-term vacation rentals (e.g., Airbnb, VRBO)	60%	79%	63%	55%	77%	69%	88%
Inclusive/ welcoming atmosphere	58%	82%	57%	53%	75%	68%	85%
Spas and wellness activities	57%	74%	55%	55%	76%	67%	83%
Nightlife scene (e.g., bars, clubs, etc.)	53%	79%	52%	48%	74%	61%	82%
Fine dining	53%	76%	51%	48%	70%	59%	81%
Variety of special events and festivals	51%	77%	45%	47%	72%	58%	79%
Shopping—unique boutiques and local artisans	50%	75%	43%	47%	72%	64%	83%
Unique local cuisine	49%	78%	38%	46%	71%	61%	83%
Good value for money	49%	83%	47%	42%	73%	56%	86%
Variety of breweries/ craft beer	48%	80%	43%	43%	70%	59%	81%
Live music (e.g., concerts, small venues, etc.)	47%	73%	42%	43%	71%	60%	81%
Easily accessible (e.g., direct flights)	47%	77%	46%	41%	71%	56%	81%
Golf	47%	68%	43%	43%	64%	50%	75%
Shopping—malls, national/global brand stores	45%	75%	37%	41%	70%	53%	82%
Sustainable practices (e.g., Leave No Trace, recycling programs)	41%	72%	38%	36%	65%	48%	77%
Performing arts (e.g., theater, ballet, etc.)	36%	64%	29%	32%	59%	43%	74%
Variety of museums and art galleries	36%	63%	29%	32%	60%	43%	72%
Professional sporting events	33%	65%	26%	28%	57%	41%	71%

Question: For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not. Base: Target audience. 1,829 completed surveys.

Reno Tahoe Travel Interest Barriers by Segment

Barrier	Total	Recent Visitor*	Lapsed Visitor	Never Visited	Cultured Creative	Mindful Mom	Ambitious Adventurer
Reno is not currently on my radar	51%	-	39%	55%	38%	49%	28%
Better value at another destination	19%	-	23%	18%	21%	17%	22%
Not enough activities in Reno that interest me	19%	-	24%	17%	14%	13%	9%
The drive to Reno takes too long	18%	-	20%	18%	20%	16%	15%
Cost of airfare is too expensive	16%	-	10%	17%	16%	16%	11%
No direct flights to Reno from my area	16%	-	14%	16%	16%	14%	17%
I don't have enough vacation time	14%	-	12%	15%	15%	14%	18%
Been before and wish to try somewhere new	12%	-	35%	7%	14%	9%	19%
Hotel/accommodations prices are too high	10%	-	10%	10%	9%	10%	11%
Cost of gas is too high	10%	-	9%	10%	14%	8%	13%
Concerns about my personal safety in Reno	4%	-	3%	3%	8%	4%	10%
Lack of suitable accommodations	3%	-	5%	3%	7%	4%	9%
Reno is not welcoming to travelers like me	3%	-	2%	3%	4%	4%	8%
Other	7%	-	7%	7%	8%	10%	7%
Base N	1095	27	213	855	291	213	168

Question: Earlier you said you were not interested in visiting Reno Tahoe in the next 24 months. What are the reasons for not considering a trip to Reno Tahoe at this time?

Base: Target audience not interested in visiting Reno Tahoe in the next two years. 1,095 completed surveys.

*sample size <100 & below 30, therefore is not being reported.

Reno Tahoe Travel Intent Barriers by Segment

Barrier	Total	Recent Visitor**	Lapsed Visitor*	Never Visited	Cultured Creative	Mindful Mom*	Ambitious Adventurer*
Reno is not currently on my radar	30%	-	27%	32%	30%	22%	24%
I don't have enough vacation time	28%	-	25%	28%	27%	24%	27%
Cost of airfare is too expensive	23%	-	22%	26%	16%	26%	20%
Better value at another destination	20%	-	15%	22%	17%	6%	14%
Cost of gas is too high	16%	-	13%	17%	17%	20%	16%
The drive to Reno takes too long	15%	-	22%	12%	15%	18%	17%
No direct flights to Reno from my area	14%	-	9%	16%	9%	11%	16%
Hotel/accommodations prices are too high	11%	-	9%	12%	5%	6%	8%
Been before and wish to try somewhere new	8%	-	21%	3%	11%	4%	16%
Not enough activities in Reno that interest me	6%	-	9%	5%	3%	4%	9%
Lack of suitable accommodations	2%	-	3%	2%	1%	0%	3%
Concerns about my personal safety in Reno	2%	-	3%	2%	1%	0%	4%
Reno is not welcoming to travelers like me	2%	-	2%	2%	1%	0%	0%
Other	11%	-	10%	10%	9%	20%	4%
Base N	358	16	98	244	105	68	56

Question: Earlier you said you were interested in visiting Reno Tahoe in the next 24 months, but not planning to visit in the next 12 months. What are the reasons for considering but not planning a trip to Reno Tahoe at this time?

Base: Target audience interested but not planning Reno Tahoe next 12 months. 358 completed surveys.

*sample size <100; **Recent Visitor sample <30, therefore is not being reported.

Destinations Visited as an Adult by Segment

	Total	Recent Visitor	Lapsed Visitor	Never Visited	Cultured Creative	Mindful Mom	Ambitious Adventurer
Las Vegas, Nevada	72%	91%	90%	62%	76%	71%	79%
Los Angeles, California	65%	82%	86%	56%	73%	63%	77%
San Diego, California	57%	79%	80%	46%	63%	54%	67%
Phoenix, Arizona	46%	65%	64%	36%	51%	42%	56%
Denver, Colorado	44%	62%	59%	36%	47%	38%	50%
Anaheim, California	42%	60%	68%	30%	46%	40%	49%
Reno Tahoe, Nevada	33%	100%	100%	0%	39%	31%	50%
Salt Lake City, Utah	32%	61%	46%	22%	40%	34%	47%
Portland, Oregon	31%	52%	50%	21%	36%	24%	34%
Monterey, California	29%	60%	52%	16%	36%	30%	40%
Sedona, Arizona	23%	38%	34%	17%	29%	22%	27%
Base N	1,829	232	395	1,202	572	394	380

Question: Which of the following destinations have you visited as an adult (that is, after age 18)?
 Table shows percent of group who selected the destination, indicating they have visited as an adult.

Reno Tahoe's Competitive Standing in Terms of Interest by Segment

Target segments exhibit similar rankings of destinations in terms of interest to the overall target audience with two notable exceptions: recent visitors, the vast majority of whom are interested in Reno Tahoe (88%), even more so than they are in visiting Las Vegas (82%); and visitors who have never visited Reno Tahoe, among whom Phoenix and Salt Lake City rank higher than Reno Tahoe.

Destination	Total	Recent Visitor	Lapsed Visitor	Never Visited	Cultured Creative	Mindful Mom	Ambitious Adventurer
Las Vegas, NV	58%	82%	62%	53%	67%	58%	74%
San Diego, CA	54%	62%	57%	51%	61%	56%	65%
Los Angeles, CA	45%	65%	46%	40%	61%	46%	68%
Reno Tahoe, NV	39%	88%	46%	27%	50%	43%	56%
Phoenix, AZ	38%	45%	39%	36%	50%	40%	50%
Salt Lake City, UT	34%	47%	34%	32%	46%	35%	50%
Base N	1,829	232	395	1,202	572	394	380

Question: Which of the following destinations are you interested in visiting in the next two years?
 Table shows percent of the column group who indicated that they are interested in visiting the row destination.

Reno Tahoe Competitive Standing in Terms of Imminent (Next-12-Month) Travel Intent by Segment

Competitive rankings for near-term travel intent align with overall interest patterns. Recent Reno Tahoe visitors demonstrate a significantly higher intent to revisit than to visit any competitor destination, including Vegas (by 16 points). And, just as with interest, those who have never visited Reno Tahoe show greater intent to visit Phoenix and Salt Lake City. Interestingly, for recent visitors, the smallest gap between interest and plans is for Reno Tahoe (6 points: 88% interested, 82% planning). This suggests they have stronger resolve to follow through on their interest in Reno Tahoe, highlighting the destination's ability to foster visitor loyalty. Underscoring this point, the 6-point gap is smallest compared to *any* other gap found among any target segment; the next largest gap is a 13-point difference between interest and intent, for Lapsed Visitors with Vegas.

Destination	Total	Recent Visitor	Lapsed Visitor	Never Visited	Cultured Creative	Mindful Mom	Ambitious Adventurer
Las Vegas, NV	40%	66%	49%	32%	53%	39%	60%
San Diego, CA	28%	45%	35%	23%	41%	33%	46%
Los Angeles, CA	27%	48%	29%	21%	42%	30%	51%
Reno Tahoe, NV	21%	82%	21%	8%	33%	27%	43%
Phoenix, AZ	17%	26%	20%	14%	27%	20%	30%
Salt Lake City, UT	16%	32%	13%	13%	26%	17%	33%
Base N	1,829	232	395	1,202	572	394	380

Question: Which of the following destinations are you planning to visit in the next 12 months? Select all that apply.
 Table shows percent of the column group who indicated that they are planning to visit the row destination in the next 12 months.

Unaided Advertising Recall by Segment

Recent visitors to Reno Tahoe were most likely of all groups to have seen advertisements for Reno Tahoe as well as all competitor destinations.

Destination	Total	Recent Visitor	Lapsed Visitor	Never Visited	Cultured Creative	Mindful Mom	Ambitious Adventurer
Las Vegas, NV	40%	56%	44%	35%	47%	41%	51%
San Diego, CA	21%	35%	29%	16%	29%	24%	33%
Los Angeles, CA	20%	34%	20%	16%	29%	23%	38%
Reno Tahoe, NV	15%	49%	15%	8%	26%	18%	34%
Salt Lake City, UT	10%	18%	8%	9%	17%	11%	19%
Phoenix, AZ	9%	14%	7%	9%	15%	9%	20%

Question: In the past 12 months, do you recall seeing any advertisements for any of the following destinations?
 Table shows percent of the column group who indicated that they recalled seeing advertisements for the row destination.

Future Partners