

Reno Tahoe Brand Tracking Surveys
SF Bay Area, Los Angeles, Seattle

Summary of Results
May 2018

Reno-Sparks Convention and Visitors Authority

Reno Tahoe Brand Tracking Surveys Overview

- ▶ Regular tracking surveys in three markets – the Bay Area, Los Angeles, and Seattle
- ▶ Surveyed population: Adults who take overnight trips; oversamples of those targeted by ad campaign
- ▶ Survey topics: Key brand metrics, including brand & ad awareness, destination ratings, intent to visit, key destination attributes, and visitation



Brand Survey Program Sample Strategy

- ▶ Surveys administered to a random sample of qualifying participants in a web panel in each of the three targeted markets.
- ▶ Within each targeted market, a minimum number of interviews were conducted with the **Advertising Target** population, to allow for tracking of key metrics within the Ad Target.
 - ▶ *Advertising Target definition: Age 25-49, household income \$75,000+, agree with at least one of the following statements: I strive to achieve a high social status; I like to live a life that impresses others; I enjoy being the center of attention; Risk taking is exciting to me.*
- ▶ Results weighted within each targeted market to reflect overall market demographics.
- ▶ Sample sizes and margins of error are similar to the April '17 baseline survey and October '17 tracking survey.

April 2018 Wave	Total Responses	Overall Margin of Error	Responses within Ad Target	Margin of Error within Ad Target
Bay Area Market	988	± 3.5%	303	± 5.6%
Los Angeles Market	925	± 4.0%	224	± 6.5%
Seattle Market	451	± 4.9%	134	± 8.5%

April 2018 Key Findings

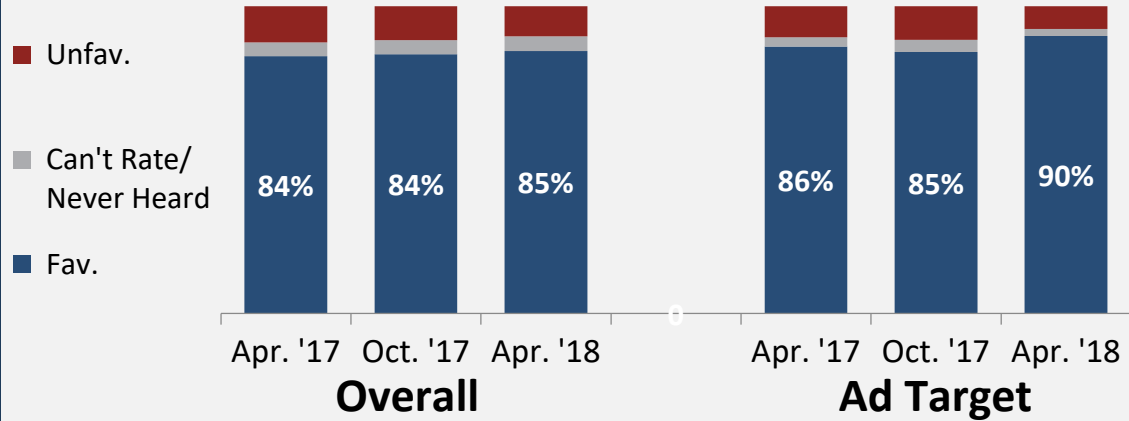
- ▶ Key indicators of Reno Tahoe destination brand strength remain strong across the three markets, including destination brand rating, desire and intent to visit, and attribute associations.
 - These measures are particularly strong among those who have engaged with the destination or the campaign.
- ▶ Advertising awareness is up across all markets, both with the Ad Target and general populations.
- ▶ Measures of campaign effectiveness continue to be strong, including ad diagnostics indicators, stated actions based on advertising exposure, and relationship of ad awareness and intent to visit.

Note: Changes Over Time

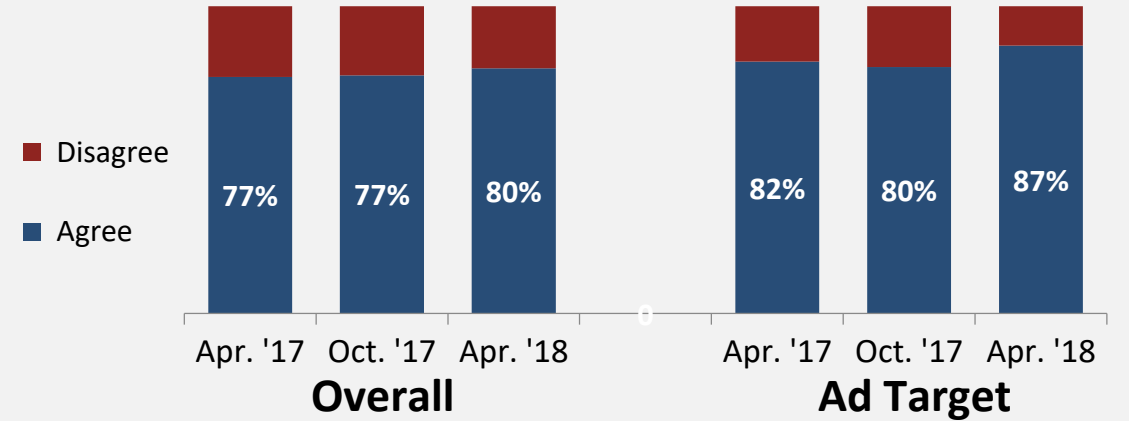
- ▶ A primary goal of this research program is to measure change in key brand metrics from survey to survey.
- ▶ To determine what changes between this research and the previous wave are statistically significant, we used a confidence interval overlap strategy using the 95% confidence level.
- ▶ For non-binary variables, top-2 box was used to evaluate significance of changes.
- ▶ Where we found a change over time (October 2017 to April 2018) outside of the overlap in confidence intervals, meaning a change that is statistically significant, the April 2018 data point is marked with a **red asterisk (*)**.

Key Metrics Dashboard – Bay Area

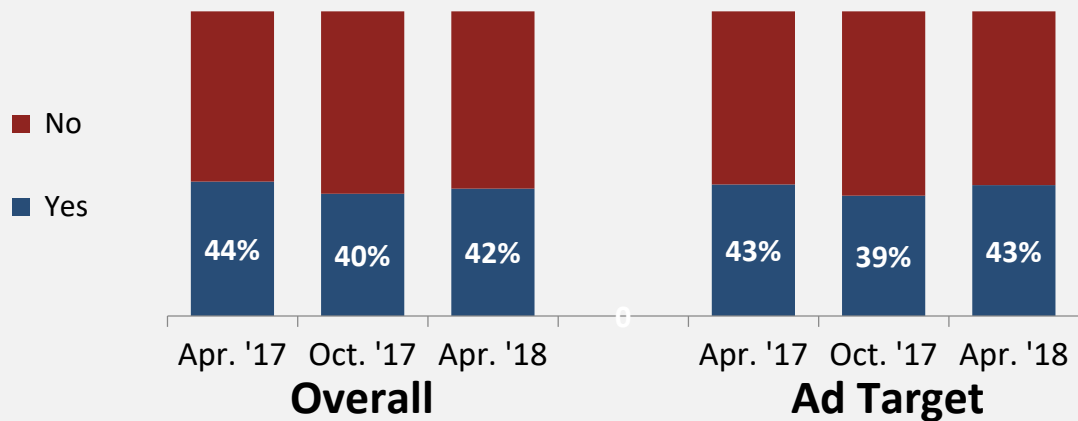
Reno Tahoe Brand Rating



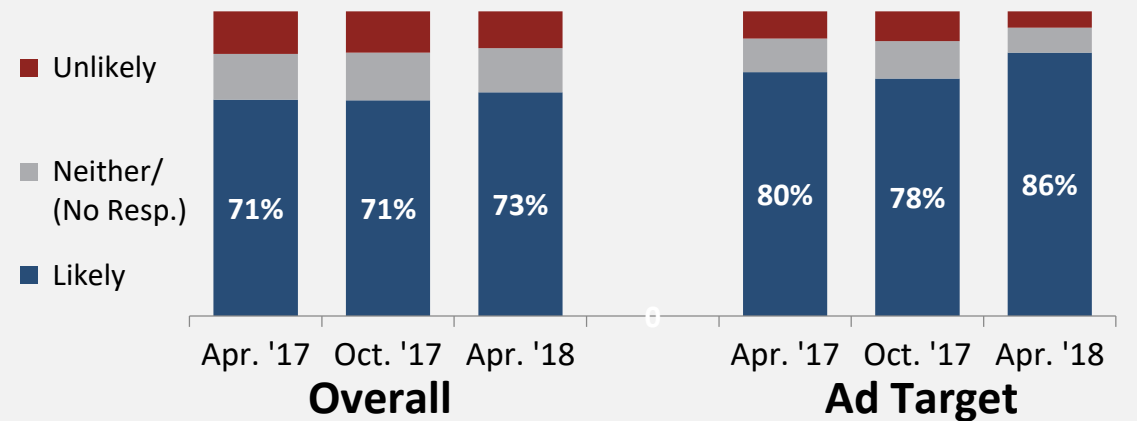
Want to Visit Reno Tahoe



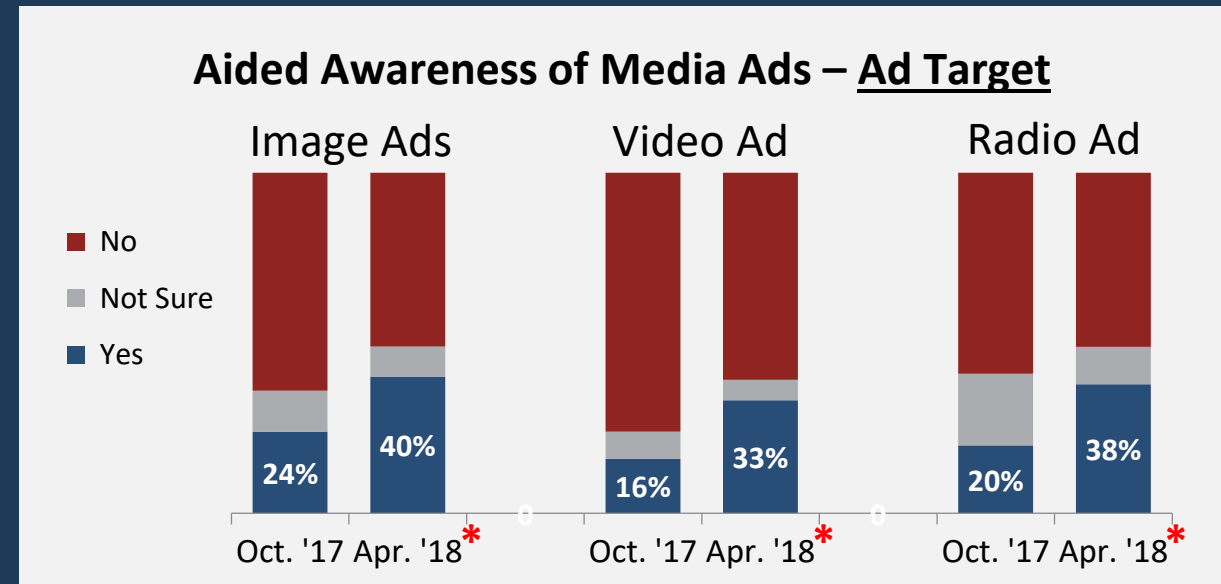
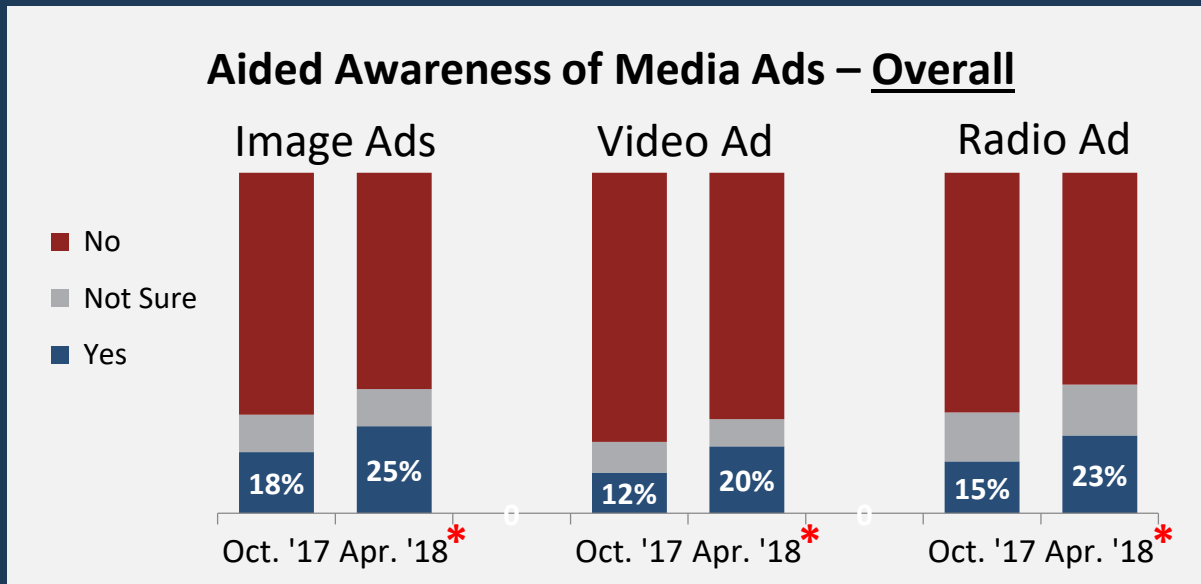
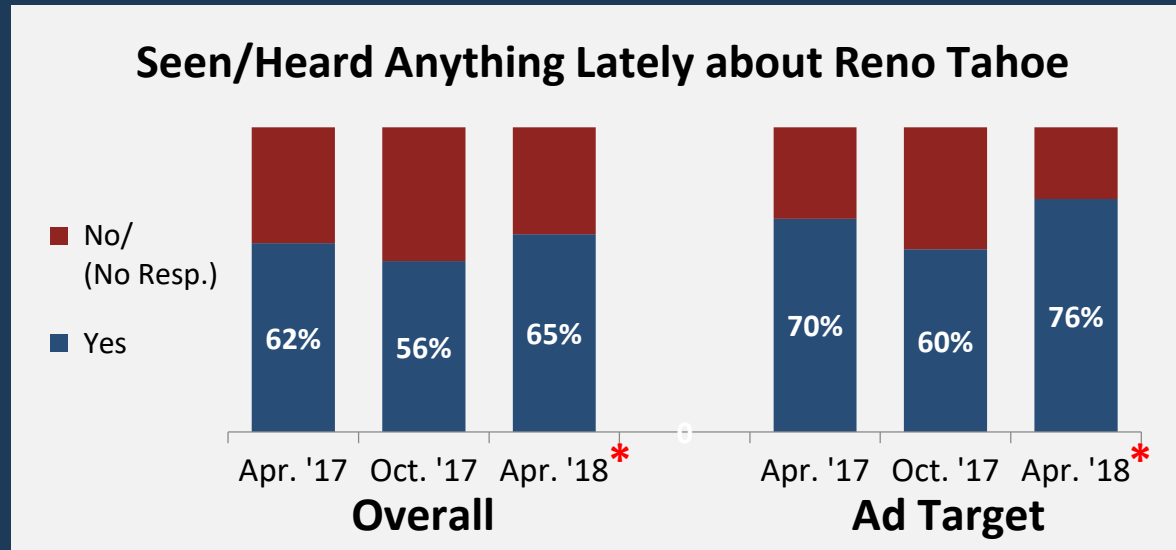
Overnight in Reno Tahoe in Last 5 Years



Likely to Visit Reno Tahoe in Next 2 Years

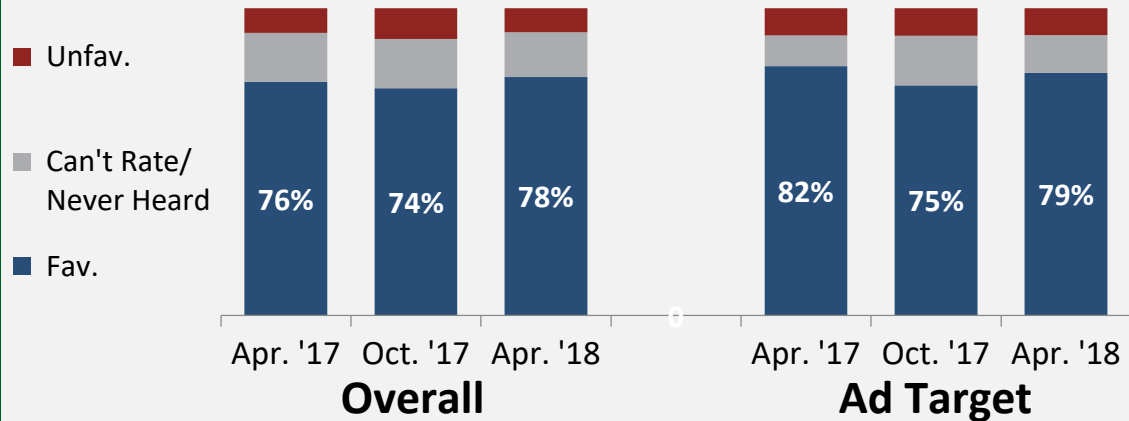


Awareness Dashboard – Bay Area

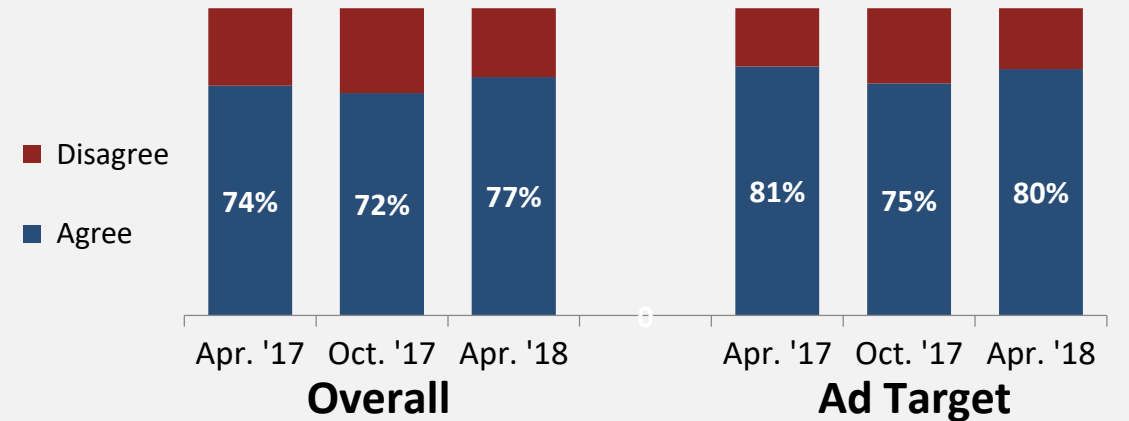


Key Metrics Dashboard – LA

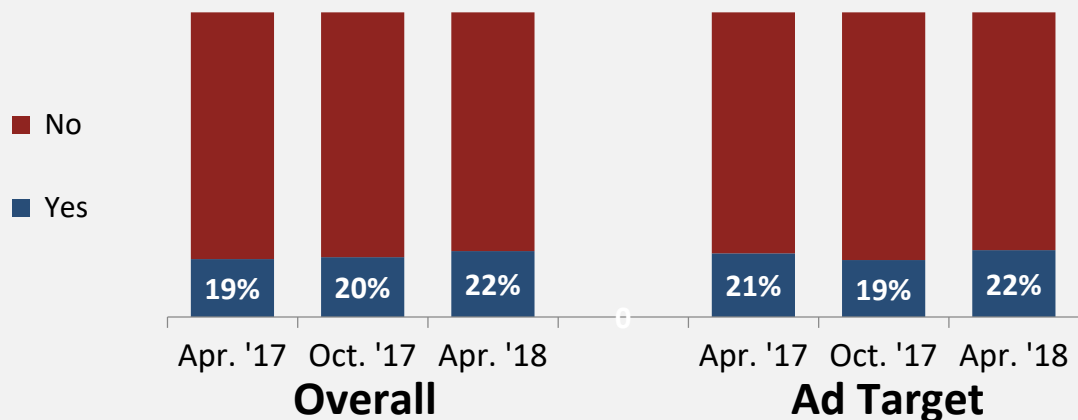
Reno Tahoe Brand Rating



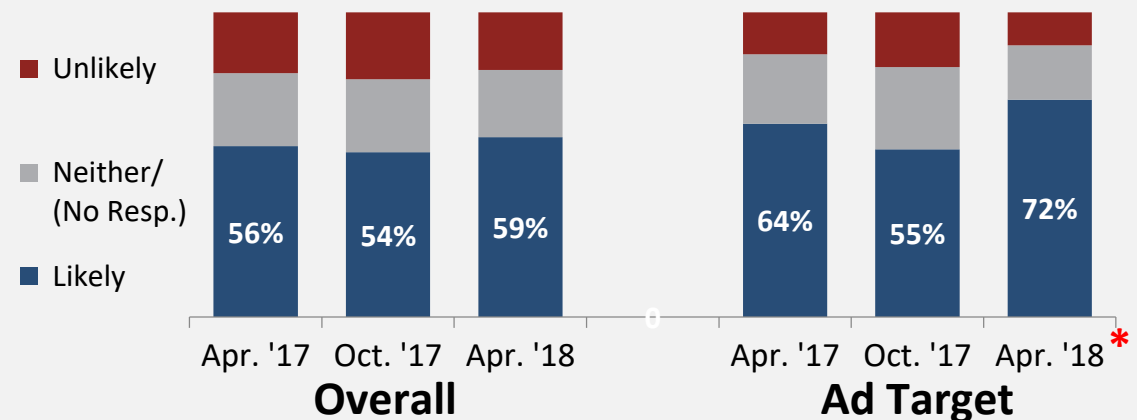
Want to Visit Reno Tahoe



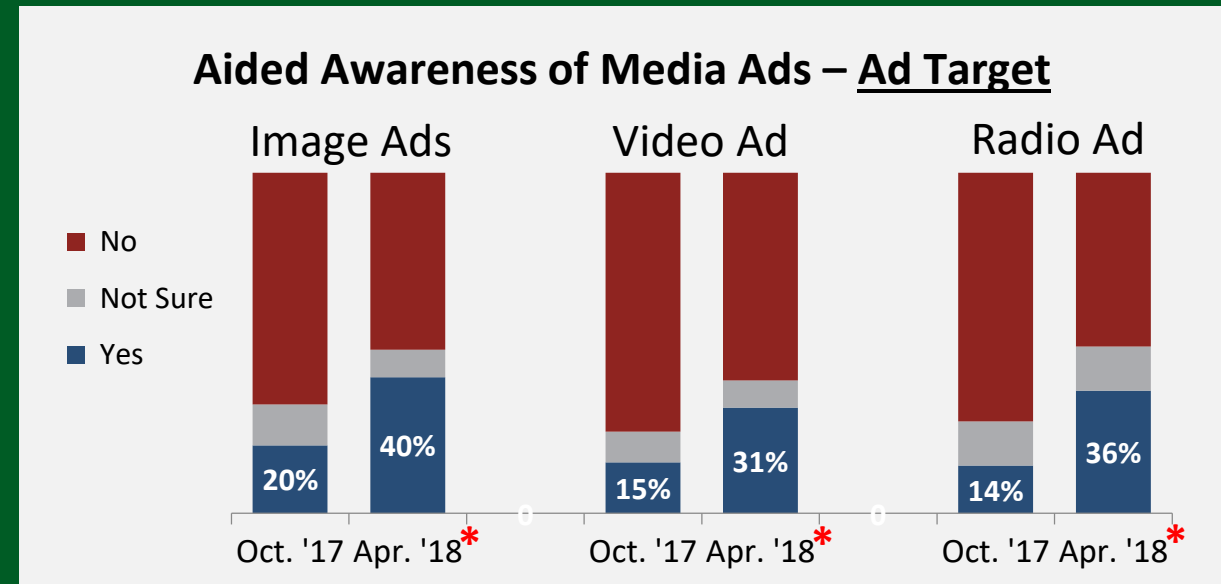
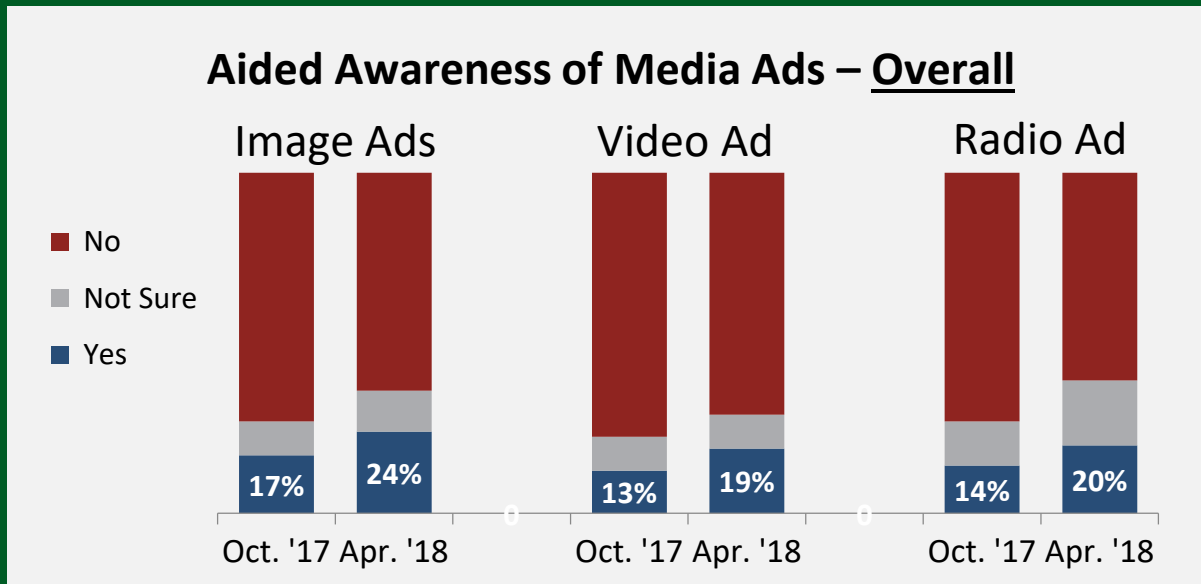
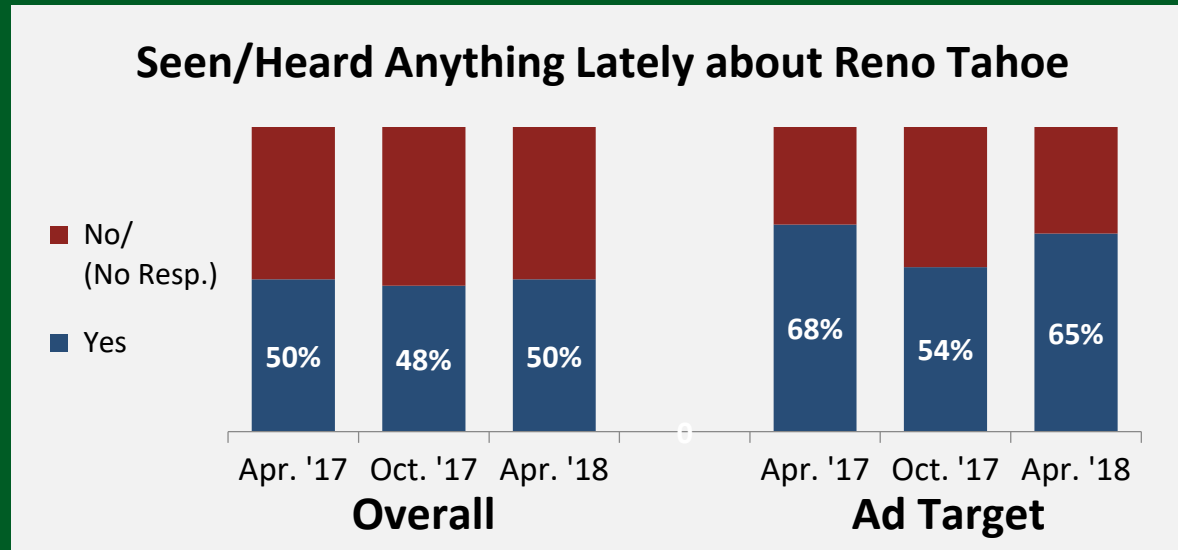
Overnight in Reno Tahoe in Last 5 Years



Likely to Visit Reno Tahoe in Next 2 Years

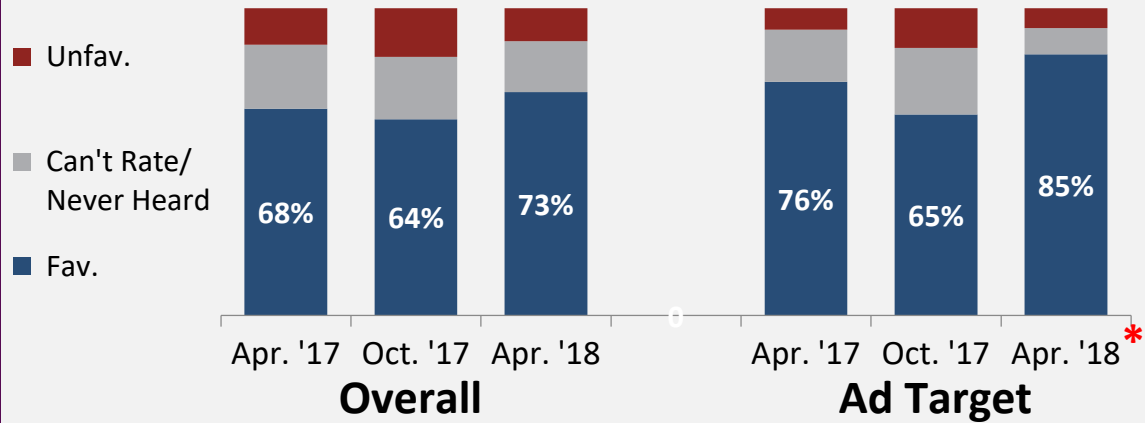


Awareness Dashboard – LA

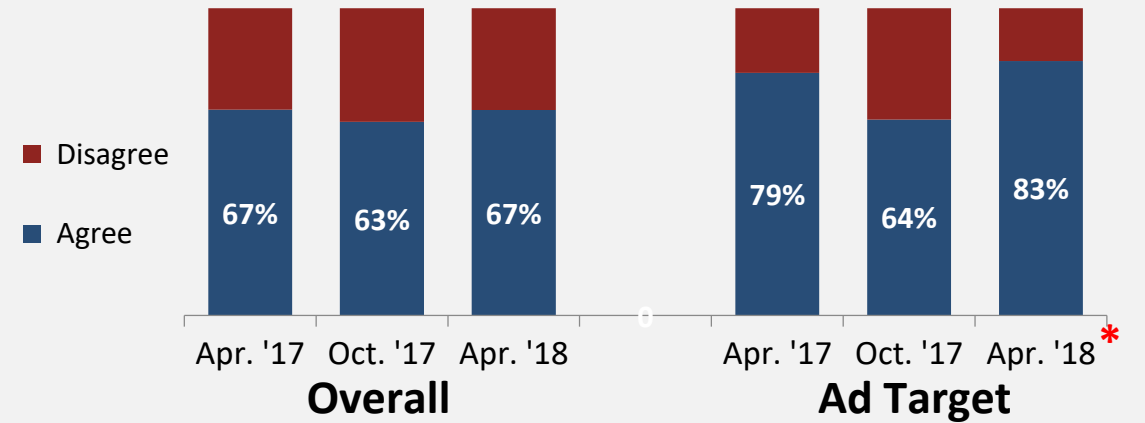


Key Metrics Dashboard – Seattle

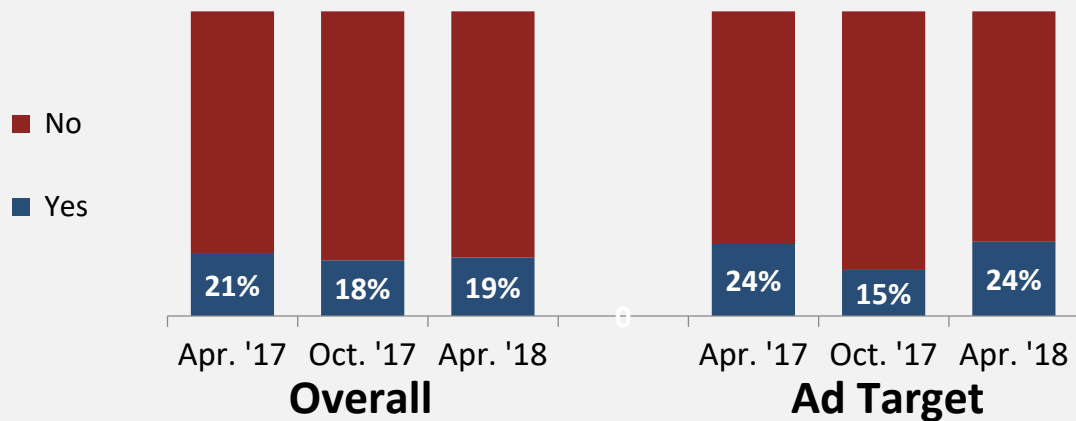
Reno Tahoe Brand Rating



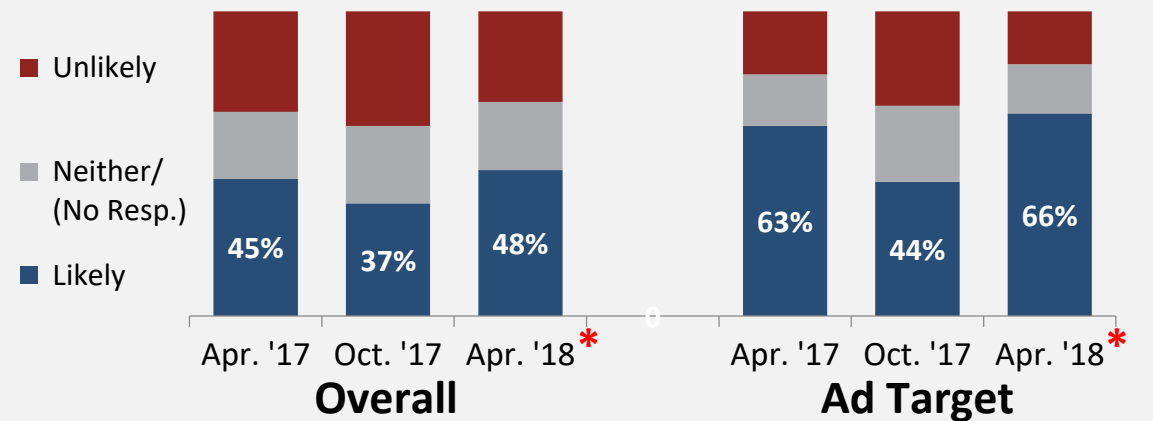
Want to Visit Reno Tahoe



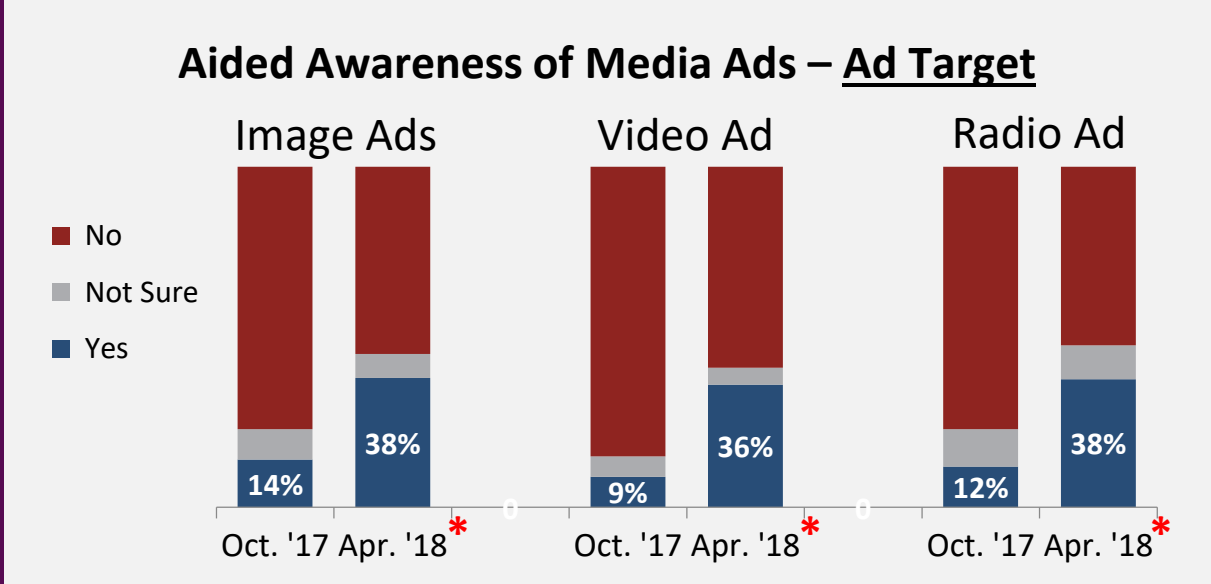
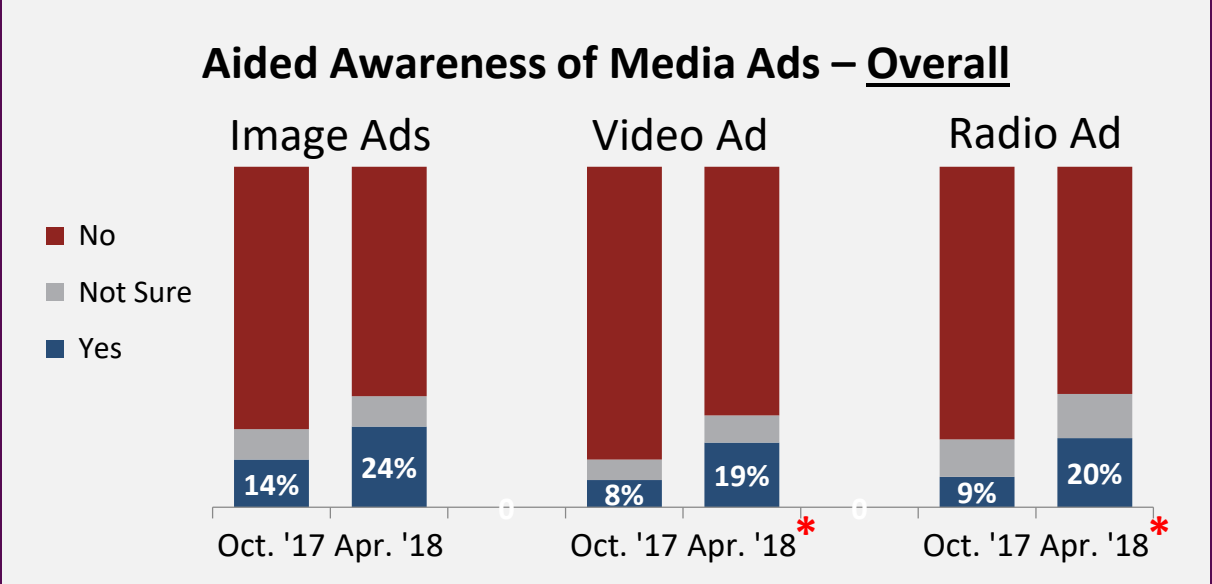
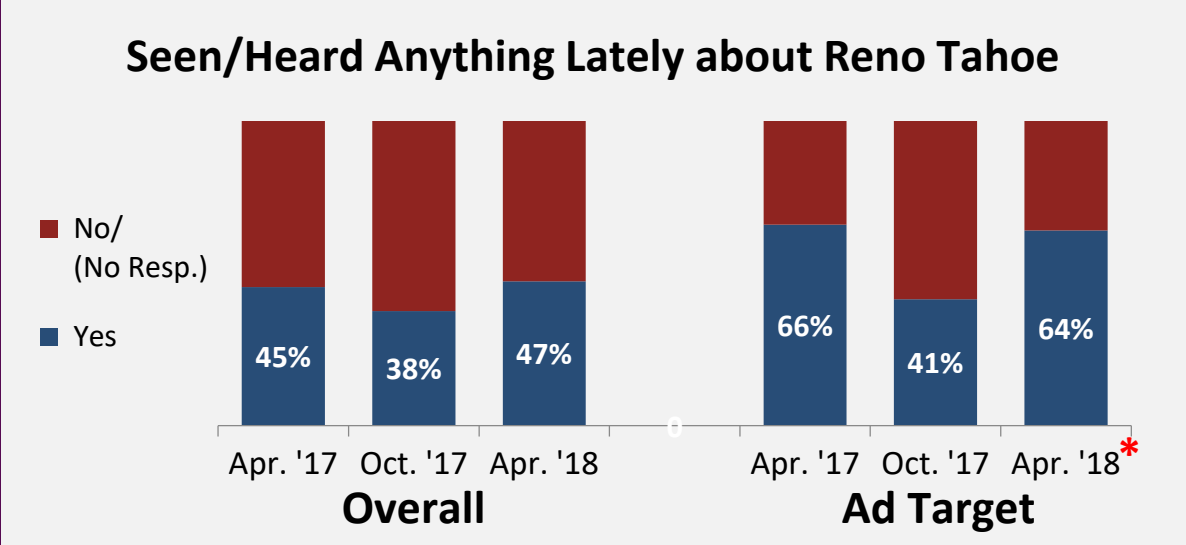
Overnight in Reno Tahoe in Last 5 Years



Likely to Visit Reno Tahoe in Next 2 Years



Awareness Dashboard – Seattle



Key Sample Differences: Gamers

- ▶ While the demographics of the overall and Ad Target populations have remained largely similar survey to survey, in October 2017 there was a decrease in the percentage of gamers in all three markets – among overall respondents and Ad Target groups alike.
- ▶ In this wave, the percentage of gamers among overall respondents returned to April 2017 levels in the Bay Area, and settled in between April '17 and October '17 levels in LA and Seattle. Among Ad Targets, the percentage of gamers increased to their highest point yet in the Bay Area and LA, and returned nearly to April '17 levels in Seattle.
- ▶ Gamers are significantly higher than non-gamers on most key Reno Tahoe metrics, including brand and advertising awareness, brand rating, desire to visit, and intent to visit.

		Overall			Ad Target		
		Apr. '17	Oct. '17	Apr. '18	Apr. '17	Oct. '17	Apr. '18
Bay Area	% Gamers	53%	39%	54%*	66%	51%	72%*
	% Non-Gamers	47%	61%	46%*	34%	49%	28%*
LA	% Gamers	64%	56%	59%	74%	60%	77%*
	% Non-Gamers	36%	44%	41%	26%	40%	23%*
Seattle	% Gamers	53%	42%	49%	73%	45%	69%*
	% Non-Gamers	47%	58%	51%	27%	55%	31%*



Getaway Destinations

Getaway Destinations: Key Findings

- ▶ Hawaii and Las Vegas are in the top three top-of-mind getaways for residents of all markets, for both summer and winter, including among our Ad Target populations.
- ▶ Lake Tahoe is also in the top three for Bay Area residents, but is farther down the list in Los Angeles and Seattle.
- ▶ In LA, local beach destinations are significant summer mentions, while winter mentions include ski destinations like Big Bear and Mammoth.
- ▶ Seattle residents see California as a destination year-round, with general beach mentions high for summer getaways.

Top of Mind Getaways – Bay Area

Lake Tahoe and Reno continue to be top-of-mind getaways for Bay Area travelers, particularly for the winter.

Bay Area – Top of Mind Summer Getaways

Thinking about getaways or short leisure trips you might take <u>in the summer</u> , what specific destinations come to mind?						
	Overall			Ad Target		
	Apr. '17	Oct. '17	Apr. '18	Apr. '17	Oct. '17	Apr. '18
Hawaii	15%	18%	16%	19%	19%	22%
Las Vegas	10%	6%	11%	10%	11%	9%
Lake Tahoe	9%	11%	11%	7%	7%	12%
Los Angeles	7%	8%	10%	7%	10%	9%
San Diego	6%	7%	8%	4%	9%	9%
Beach	6%	4%	6%	7%	4%	7%
Disney	6%	4%	6%	5%	6%	9%
Reno	2%	2%	4%	3%	2%	2%

Bay Area – Top of Mind Winter Getaways

And what about getaways or short leisure trips you might take <u>in the winter</u> , what specific destinations come to mind?						
	Overall			Ad Target		
	Apr. '17	Oct. '17	Apr. '18	Apr. '17	Oct. '17	Apr. '18
Lake Tahoe	24%	31%	29%	24%	39%	33%
Hawaii	12%	14%	10%	9%	14%	9%
Las Vegas	7%	6%	8%	5%	7%	7%
San Diego	4%	5%	5%	2%	5%	4%
Los Angeles	4%	6%	4%	2%	6%	2%
Florida	3%	3%	4%	5%	3%	4%
Colorado	4%	3%	4%	7%	3%	7%
California	2%	4%	4%	1%	1%	3%
New York	4%	3%	4%	7%	4%	5%
Reno	5%	5%	4%	3%	7%	3%

Top of Mind Getaways – Los Angeles

Lake Tahoe mentions as a winter getaway are slightly down among Ad Targets in Los Angeles, possibly reflecting seasonal variation.

Los Angeles – Top of Mind Summer Getaways

Thinking about getaways or short leisure trips you might take <u>in the summer</u> , what specific destinations come to mind?						
	Overall			Ad Target		
	Apr. '17	Oct. '17	Apr. '18	Apr. '17	Oct. '17	Apr. '18
Las Vegas	16%	11%	16%	12%	11%	15%
Hawaii	10%	16%	14%	10%	22%	17%
San Diego	12%	11%	13%	11%	13%	12%
Mexico	9%	9%	9%	10%	10%	9%
San Francisco	7%	8%	8%	7%	8%	10%
Beach	5%	7%	6%	5%	6%	6%
Santa Barbara	5%	9%	6%	4%	11%	6%
Lake Tahoe	1%	2%	2%	0%	3%	2%
Reno	0%	0%	0%	-	0%	-

Los Angeles – Top of Mind Winter Getaways

And what about getaways or short leisure trips you might take <u>in the winter</u> , what specific destinations come to mind?						
	Overall			Ad Target		
	Apr. '17	Oct. '17	Apr. '18	Apr. '17	Oct. '17	Apr. '18
Las Vegas	10%	13%	11%	5%	10%	7%
Big Bear	9%	12%	10%	9%	17%	11%
Hawaii	6%	13%	9%	6%	14%	11%
San Diego	8%	7%	6%	5%	10%	4%
Palm Springs	5%	5%	6%	3%	5%	3%
Colorado	4%	4%	5%	3%	4%	7%
Mammoth	4%	6%	5%	5%	10%	8%
New York	5%	5%	5%	9%	6%	8%
Lake Tahoe	4%	6%	5%	4%	11%	5%
Reno	0%	0%	1%	-	1%	2%

Multiple responses were accepted to Q12 & 13.

Top of Mind Getaways – Seattle

Neither Reno nor Lake Tahoe are currently top-of-mind getaway destinations among travelers in Seattle.

Seattle – Top of Mind Summer Getaways

Thinking about getaways or short leisure trips you might take <u>in the summer</u> , what specific destinations come to mind?						
	Overall			Ad Target		
	Apr. '17	Oct. '17	Apr. '18	Apr. '17	Oct. '17	Apr. '18
Beach	9%	7%	10%	4%	11%	8%
Las Vegas	8%	4%	10%	6%	3%	10%
Hawaii	8%	10%	9%	6%	9%	10%
Vancouver	9%	6%	7%	8%	9%	5%
California	9%	13%	7%	9%	14%	8%
Washington	5%	8%	7%	3%	9%	6%
Oregon	7%	7%	6%	4%	9%	4%
National Parks	4%	5%	6%	2%	9%	2%
Lake Tahoe	0%	1%	0%	-	-	-
Reno	1%	1%	0%	-	-	-

Seattle – Top of Mind Winter Getaways

And what about getaways or short leisure trips you might take <u>in the winter</u> , what specific destinations come to mind?						
	Overall			Ad Target		
	Apr. '17	Oct. '17	Apr. '18	Apr. '17	Oct. '17	Apr. '18
Hawaii	15%	25%	12%	8%	26%	14%
Las Vegas	5%	5%	8%	4%	3%	7%
California	9%	8%	6%	7%	4%	8%
Mexico	6%	10%	5%	5%	13%	4%
Leavenworth	5%	6%	5%	5%	6%	4%
Florida	5%	6%	5%	3%	4%	5%
Arizona	7%	6%	5%	5%	5%	3%
Lake Tahoe	1%	2%	1%	1%	2%	-
Reno	1%	0%	0%	1%	0%	-



Reno Tahoe Brand Awareness

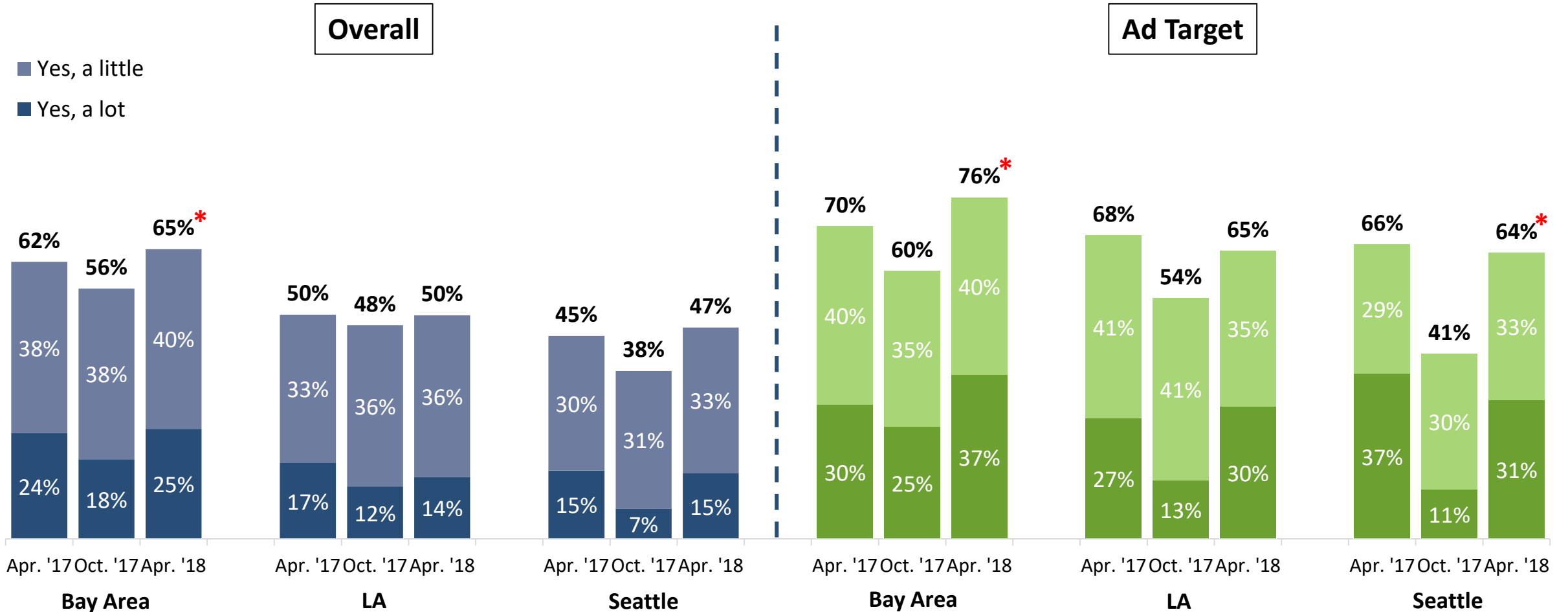
Brand Awareness: Key Findings

- ▶ Reno Tahoe destination brand awareness has risen in the Bay Area (in the overall population and in the Ad Target market), as well as in the Seattle Ad Target market. Awareness in Los Angeles has remained consistent.
- ▶ Snow and winter mentions are more prominent in the Bay Area than in LA and Seattle.
- ▶ Online and word-of-mouth continue to be key awareness drivers.

Seen or Heard about Reno Tahoe

Awareness of Reno Tahoe in the Ad Target is up in the Bay Area and Los Angeles, similar to last spring. Those in the Ad Target are more likely to have heard something about Reno Tahoe lately.

Have you seen or heard anything lately about Reno Tahoe?



What Have You Heard about Reno Tahoe Lately?



Ski and snow mentions are the most prominent in unaided Reno Tahoe awareness.

(Responses Among Those Who Have Heard Something About Reno Tahoe)



Q16. What have you seen or heard about Reno Tahoe lately?
(Showing responses from all three markets combined.)

Word Cloud only displays data for April 2018.

18-6777; 18-6778; 18-6779 RSCVA Brand Tracking Surveys – Spring 2018 | 21

What Have You Heard about Reno Tahoe Lately?

Seattle and LA residents who heard something about Reno Tahoe are most likely to mention ads or Reno Tahoe as a tourist destination. At the end of the ski season in April, Bay Area residents are more likely to report hearing something about Reno Tahoe as a winter destination and snow coverage.

(Responses Among Those Who Have Heard Something About Reno Tahoe)

What have you seen or heard about Reno Tahoe lately?	Bay Area			Los Angeles			Seattle		
	Apr. '17 (n=683)	Oct. '17 (n=497)	Apr. '18 (n=645)	Apr. '17 (n=420)	Oct. '17 (n=404)	Apr. '18 (n=463)	Apr. '17 (n=240)	Oct. '17 (n=188)	Apr. '18 (n=213)
Good winter destination/for winter activities (skiing, etc.)	16%	8%	13%	9%	10%	14%	7%	6%	8%
Saw/Heard ads	14%	17%	12%	11%	15%	12%	10%	15%	16%
Casinos	11%	11%	12%	11%	12%	10%	6%	8%	7%
About the snow coverage	18%	8%	10%	6%	2%	5%	2%	1%	2%
Tourist destination/Good place to visit	9%	6%	7%	9%	15%	13%	14%	15%	14%
Saw it on TV	-	1%	5%	-	1%	5%	-	2%	6%
Concert/Show/Entertainment	5%	6%	5%	1%	3%	2%	2%	-	0%
Heard from friends/family who went there	4%	4%	4%	4%	5%	6%	5%	6%	6%
Soft Positive (Good, like it, wonderful, etc.)	1%	1%	4%	5%	1%	5%	9%	1%	3%
Weather info	2%	3%	3%	1%	2%	1%	1%	1%	2%
New hotels/Good accommodations	3%	6%	3%	3%	4%	2%	3%	4%	1%
Saw pictures/Read about it online	1%	2%	3%	1%	2%	3%	3%	4%	4%
Fun/Adventurous	3%	2%	3%	3%	4%	2%	3%	3%	3%
Beautiful landscape	4%	3%	3%	7%	7%	8%	6%	3%	5%

Multiple responses were accepted to Q16.

Where Have You Heard about Reno Tahoe?

Internet, TV, and friends/family continue to be the most common places to see or hear something about Reno Tahoe.

(Responses Among Those Who Have Heard/Seen Something About Reno Tahoe Lately)

And where have you seen or heard about Reno Tahoe recently?	Bay Area (n=645)	LA (n=463)	Seattle (n=213)
Internet/On the web	40%	35%	36%
TV	38%	27%	35%
Friend/Family	35%	31%	30%
Social media like Facebook/Twitter	26%	25%	27%
Radio	17%	16%	27%
Billboards	15%	16%	21%
Newspaper	13%	9%	11%
Magazine	10%	19%	18%

Multiple responses were accepted to Q17. Table only displays data for April 2018.



Advertising Effectiveness

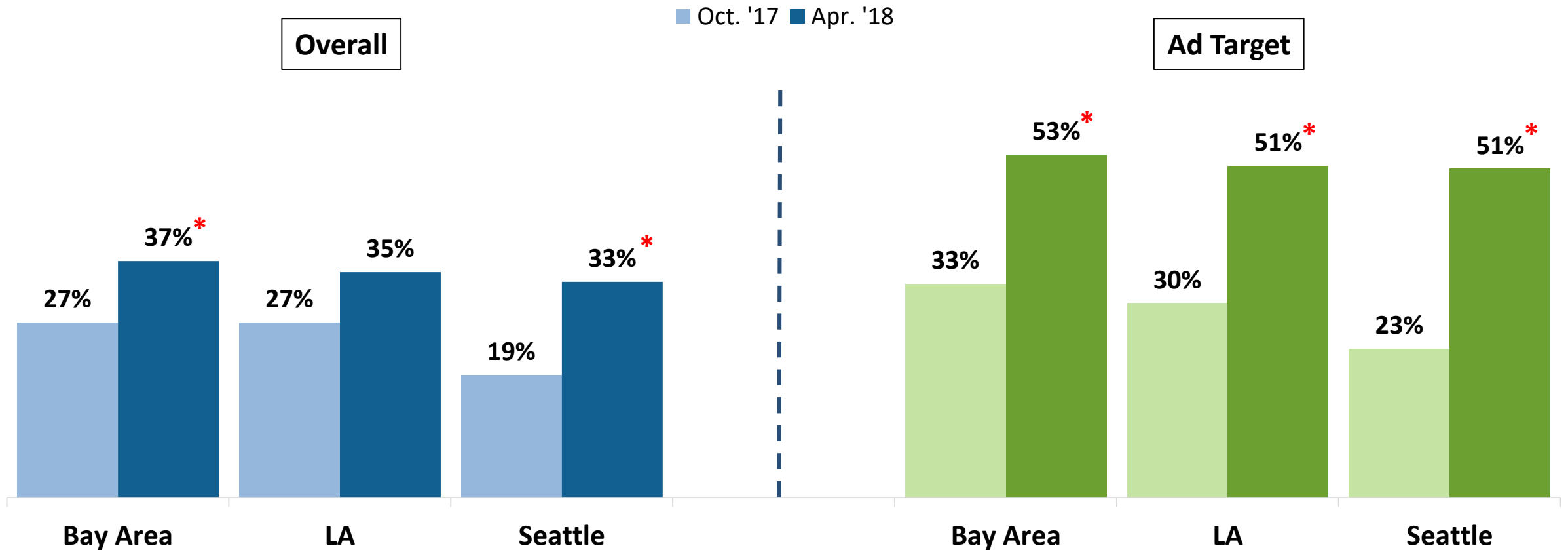
Advertising Effectiveness: Key Findings

- ▶ Ad recall is up in the Ad Target population in all markets.
- ▶ The ads characterize Reno Tahoe as a fun, active, outdoors destination.
- ▶ Four-in-five in the Ad Target population who recall the ads report taking an action in response.
- ▶ Hearing or seeing an ad was most likely to make Bay Area and LA Ad Target populations consider taking a trip, while Seattleites were more likely to have their trip decision confirmed or their trip lengthened by ad exposure.
- ▶ Ad diagnostics remain strong, especially with the Ad Targets.

Aided Ad Recall: Summary

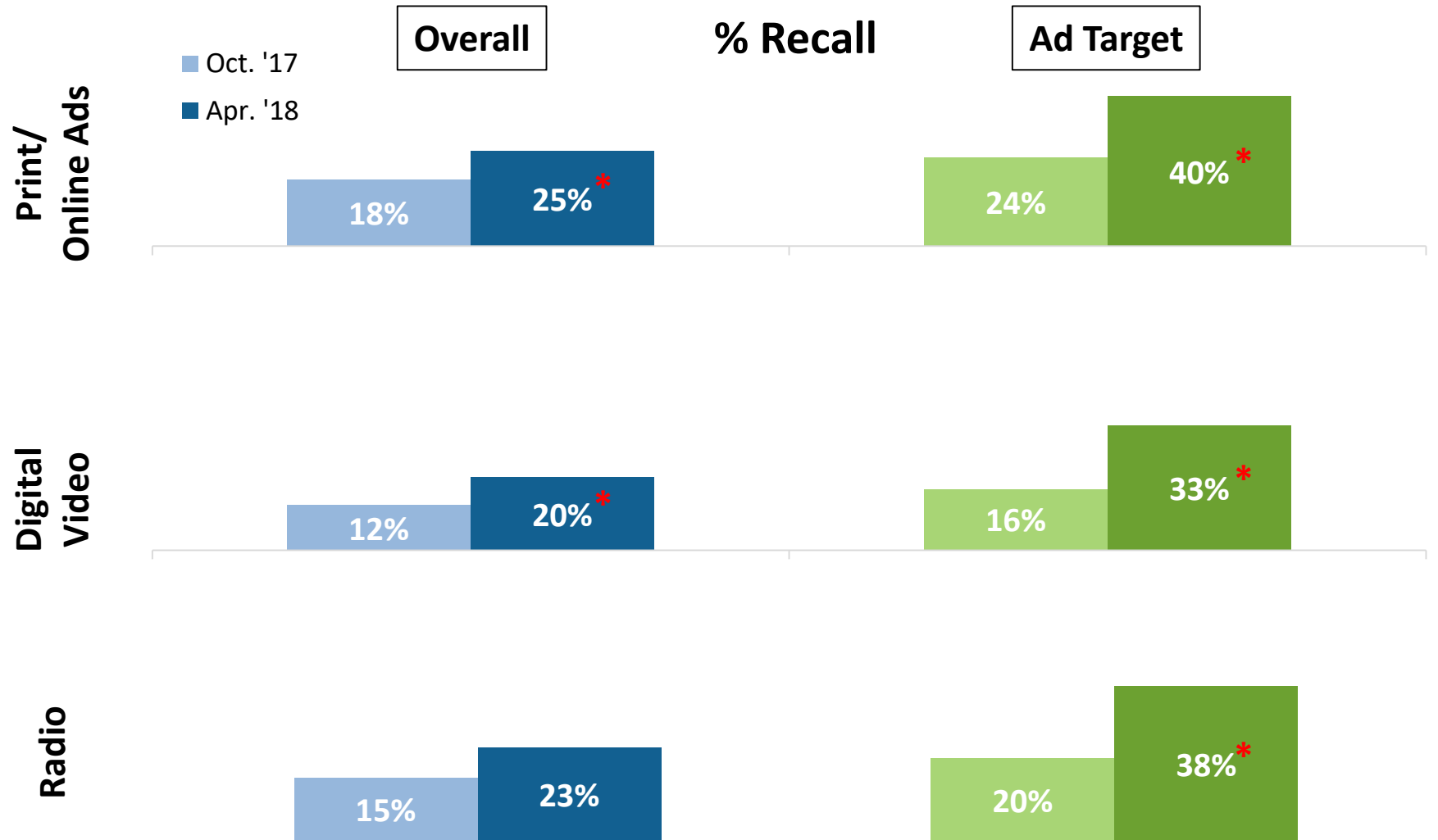
Ad awareness has increased in all three markets, particularly among the advertising target populations.

% Who Recall At Least One Ad (Print, Digital Video, or Radio)



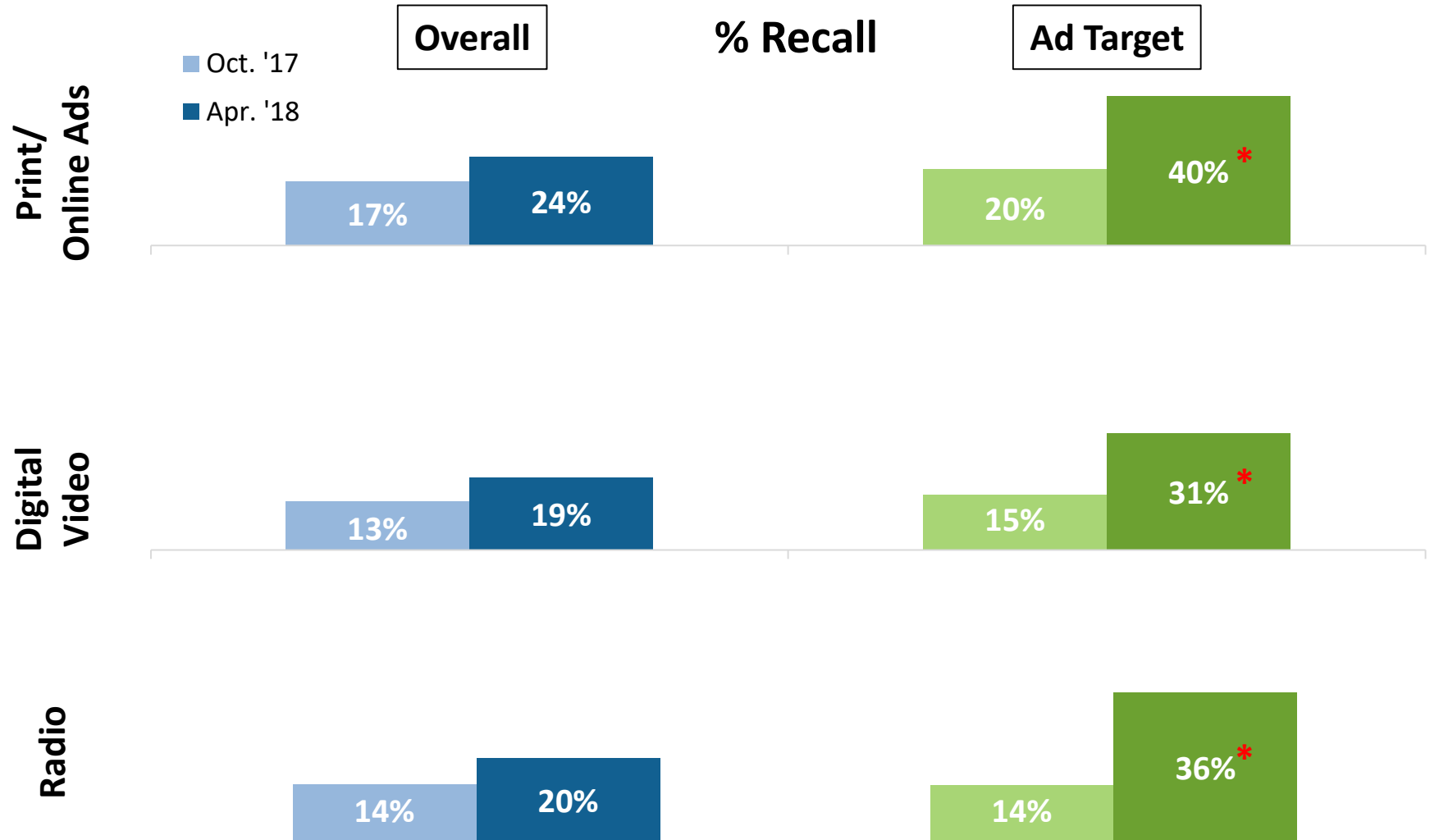
Aided Ad Recall – Bay Area

In the Bay Area, 4 in 10 among the Ad Target say they have seen the print/online ads.



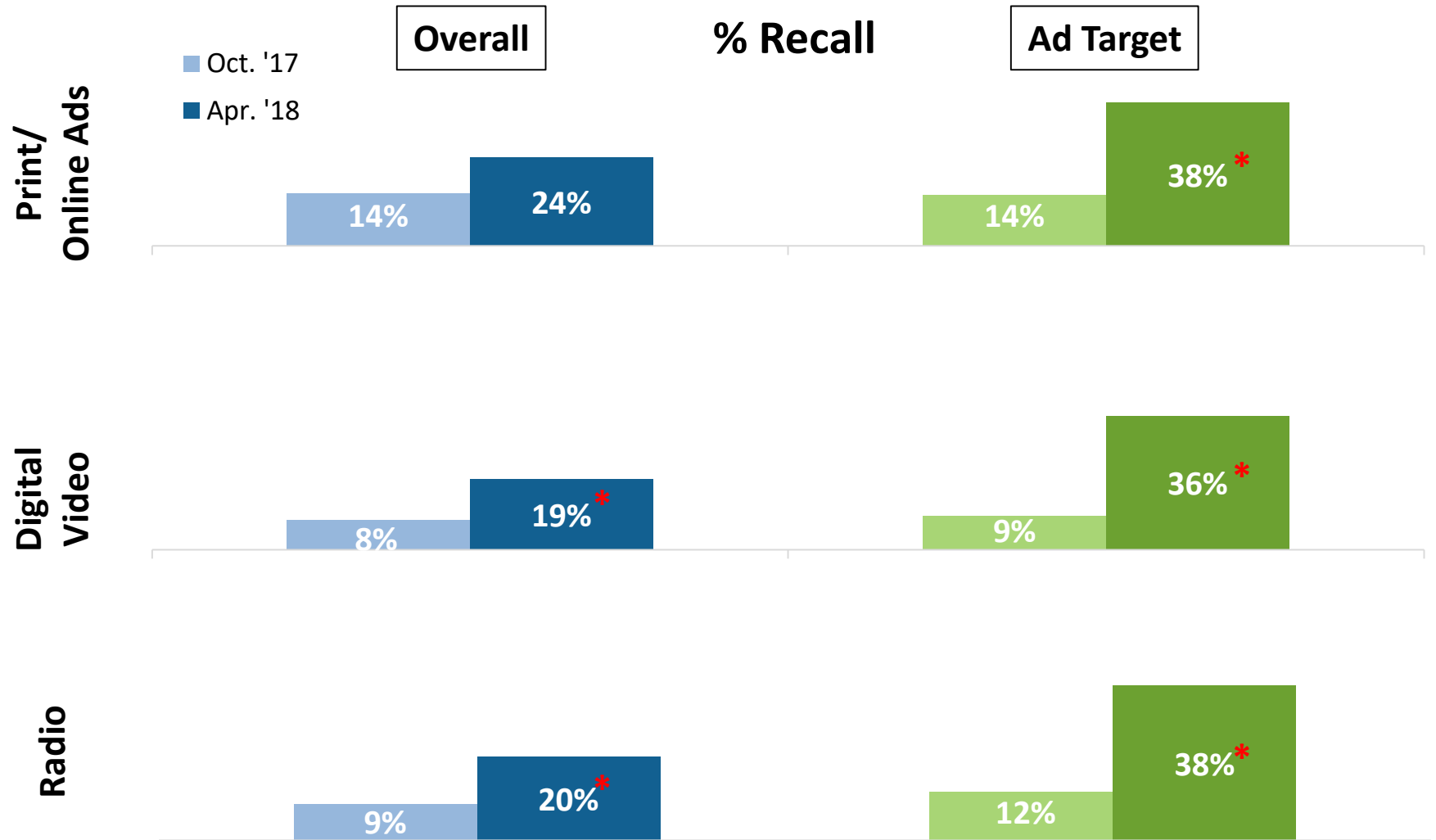
Aided Ad Recall – Los Angeles

Recall of each ad type has doubled since October among the Ad Target in the Los Angeles area.



Aided Ad Recall – Seattle

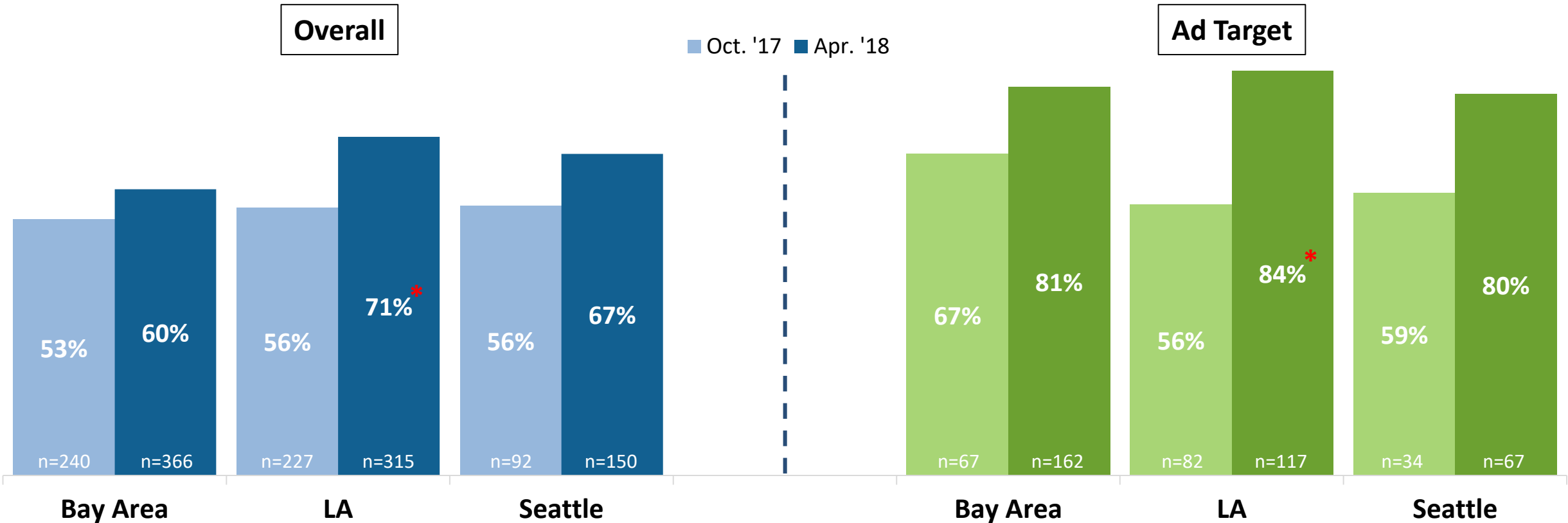
Radio ad recall has more than tripled and digital video ad recall has quadrupled among the Ad Target in the Seattle area.



Actions Taken After Seeing Ads: Summary

Most who recall seeing ads took at least one action, with a significant increase in LA over the October 2017 survey. In all three markets, a larger share of the Ad Target took at least one action compared to the overall population.

**% Who Took An Action as a Result of Advertising
(Among Those Who Recall Seeing/Hearing an Ad)**

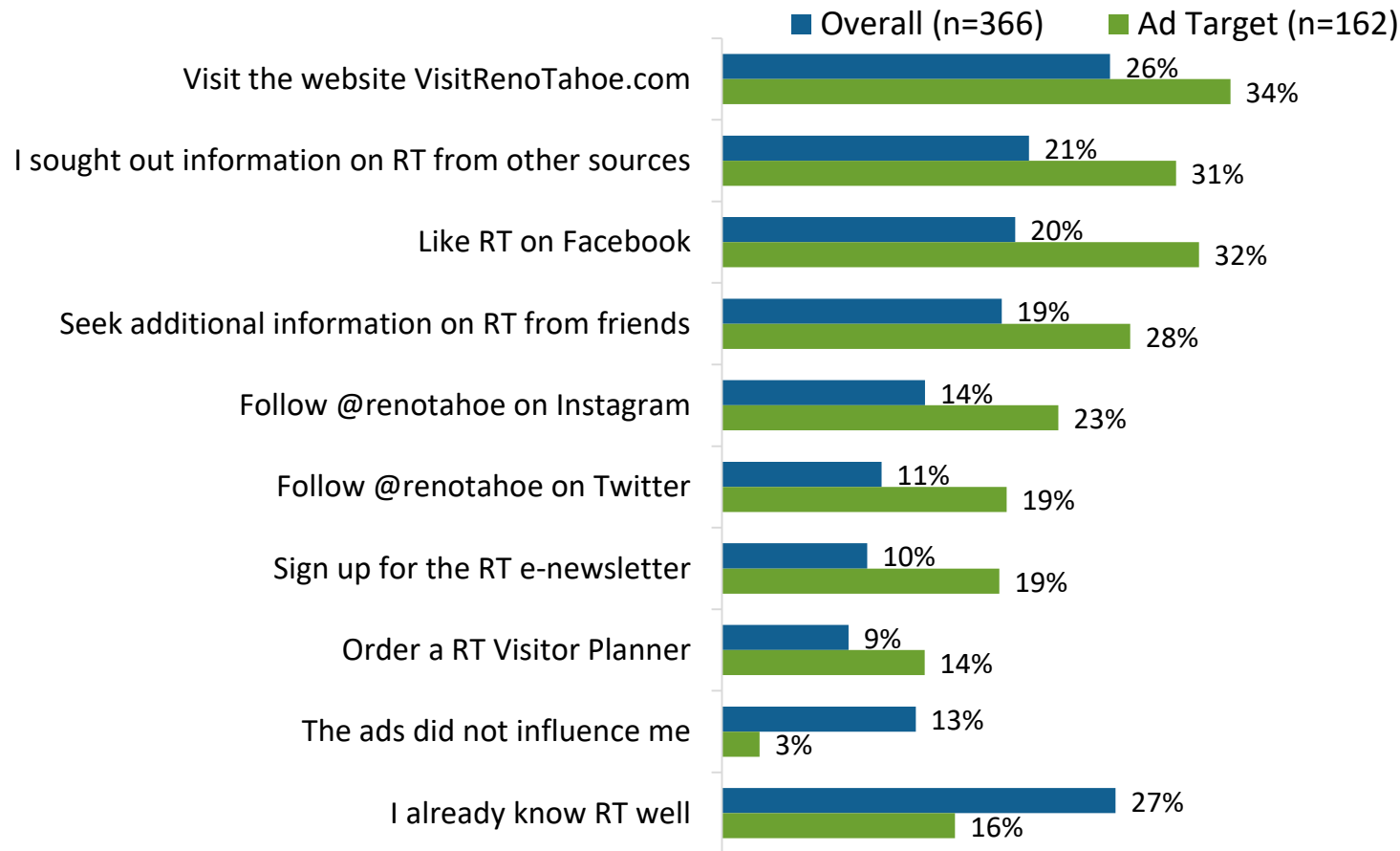


Q65. Has the advertising you have seen regarding Reno Tahoe over the last few months made you do any of the following? Please check all that apply.

Actions Taken After Seeing Ads – Bay Area

The Bay Area Ad Target population takes a variety of actions after seeing ads, including visiting the website, seeking additional information, and engaging on social media.

(Among Those Who Recall Seeing/Hearing an Ad)



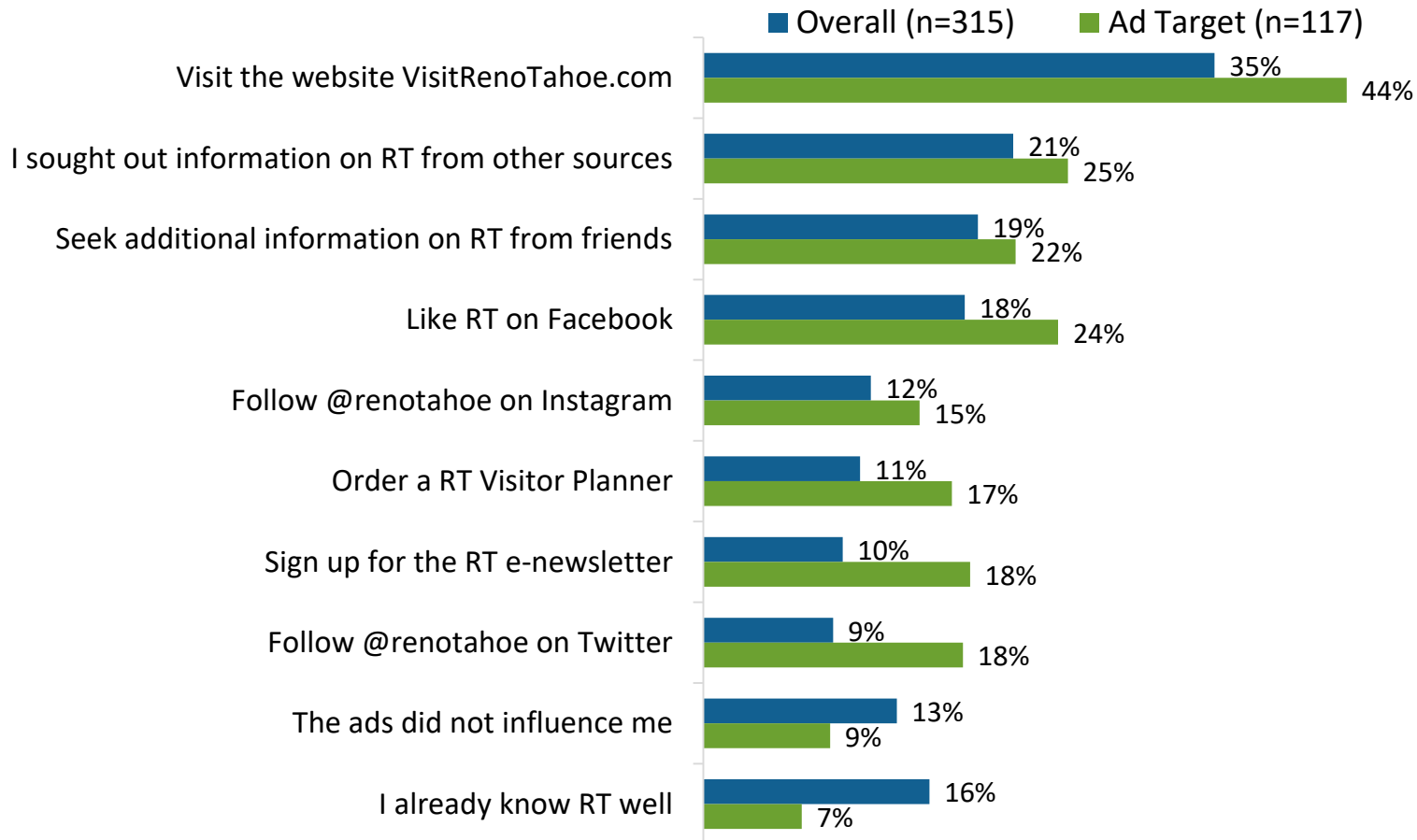
81% of the Bay Area Ad Target who have seen or heard ads report taking an action.

Q65. Has the advertising you have seen regarding Reno Tahoe over the last few months made you do any of the following? *Please check all that apply.*

Actions Taken After Seeing Ads – Los Angeles

The Ad Target in LA is most likely to visit the website after seeing the ads.

(Among Those Who Recall Seeing/Hearing an Ad)



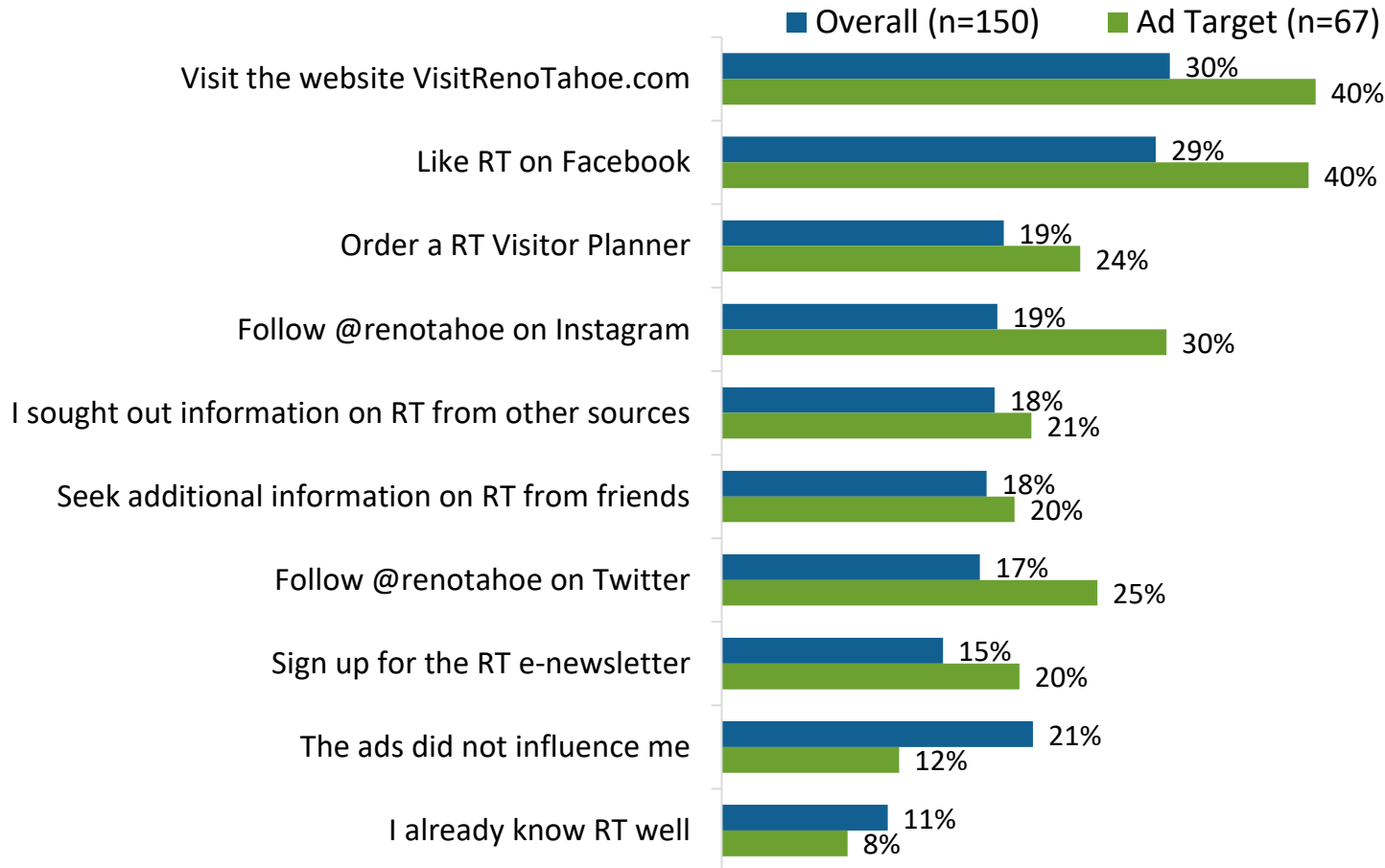
84% of the LA Ad Target who have seen or heard ads report taking an action.

Q65. Has the advertising you have seen regarding Reno Tahoe over the last few months made you do any of the following? Please check all that apply.

Actions Taken After Seeing Ads – Seattle

Website and social media interactions are most common with the Seattle Ad Target after seeing the ads.

(Among Those Who Recall Seeing/Hearing an Ad)



80% of the Seattle Ad Target who have seen or heard ads report taking an action.

Q65. Has the advertising you have seen regarding Reno Tahoe over the last few months made you do any of the following? *Please check all that apply.*

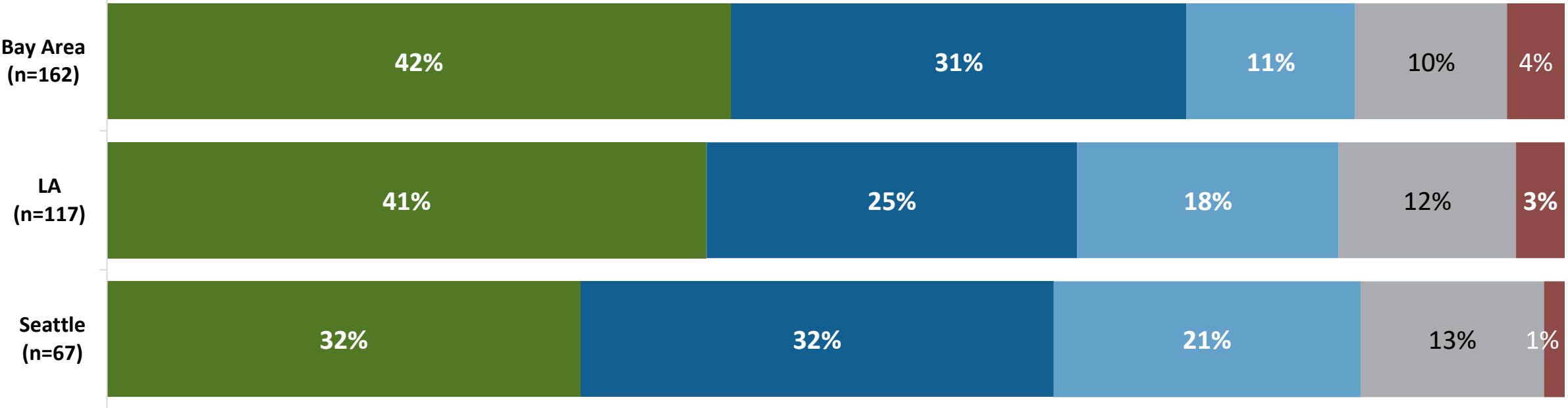
Advertising Impact on Travel Plans: Summary



For the nearer markets of the Bay Area and LA among the Ad Target, seeing or hearing ads was most likely to lead to consideration of a trip, while the Seattle Ad Target was more likely to confirm a visit decision they already made, or lengthen an already-planned stay.

(Among Ad Target Who Recall Seeing/Hearing an Ad)

- Convinced me to consider taking a trip to Reno Tahoe
- Confirmed the decision I had already made to visit Reno Tahoe
- Caused me to lengthen my stay or visit additional Reno Tahoe attractions/areas
- Did not have any impact on my travel plans
- Helped me decide Reno Tahoe is not a destination I would like to visit

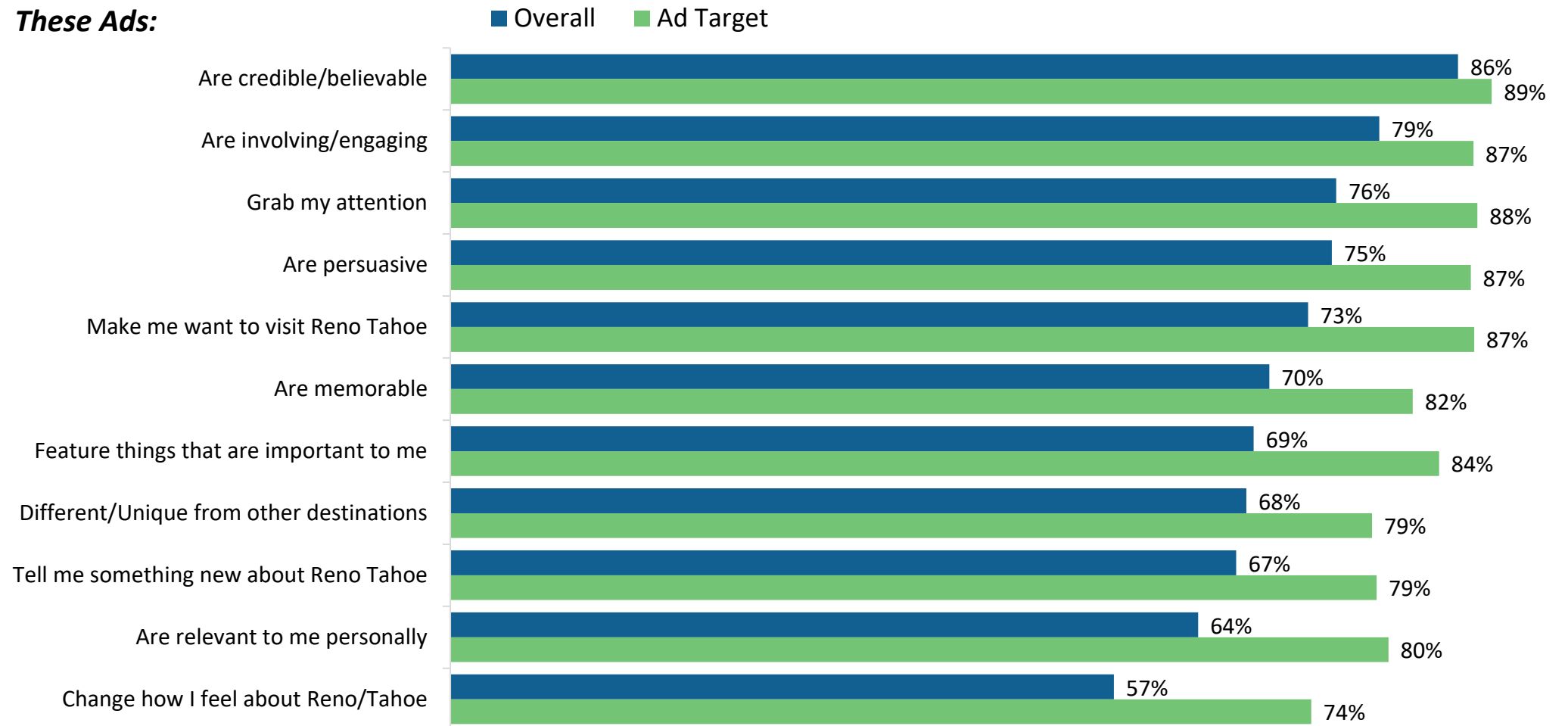


Q66. How has the advertising you have seen regarding Reno Tahoe over the last few months affected your travel plans?

Reno Tahoe Ad Diagnostics – Bay Area

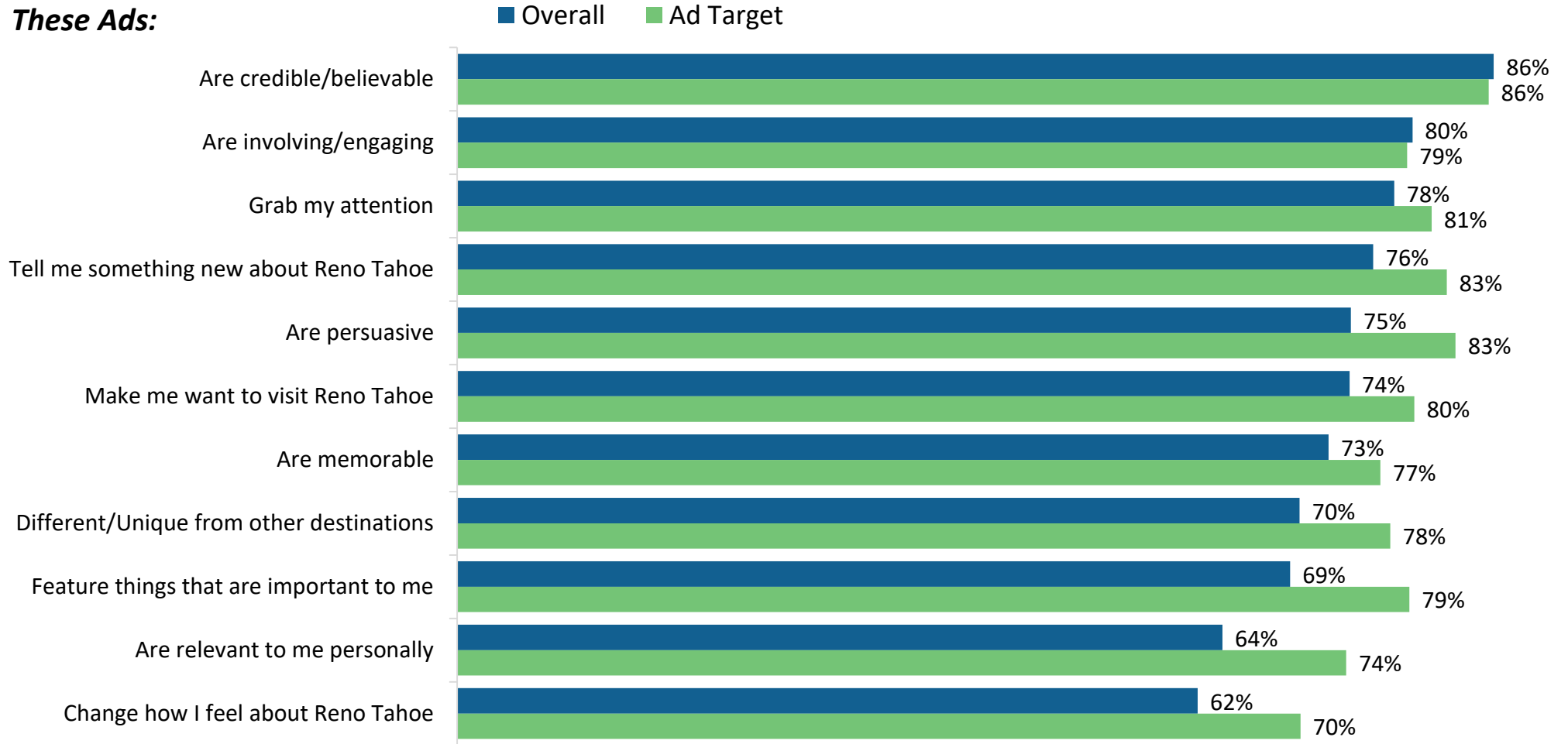
The ads are viewed positively in the Bay Area, especially among the Ad Target.

These Ads:



Reno Tahoe Ad Diagnostics – Los Angeles

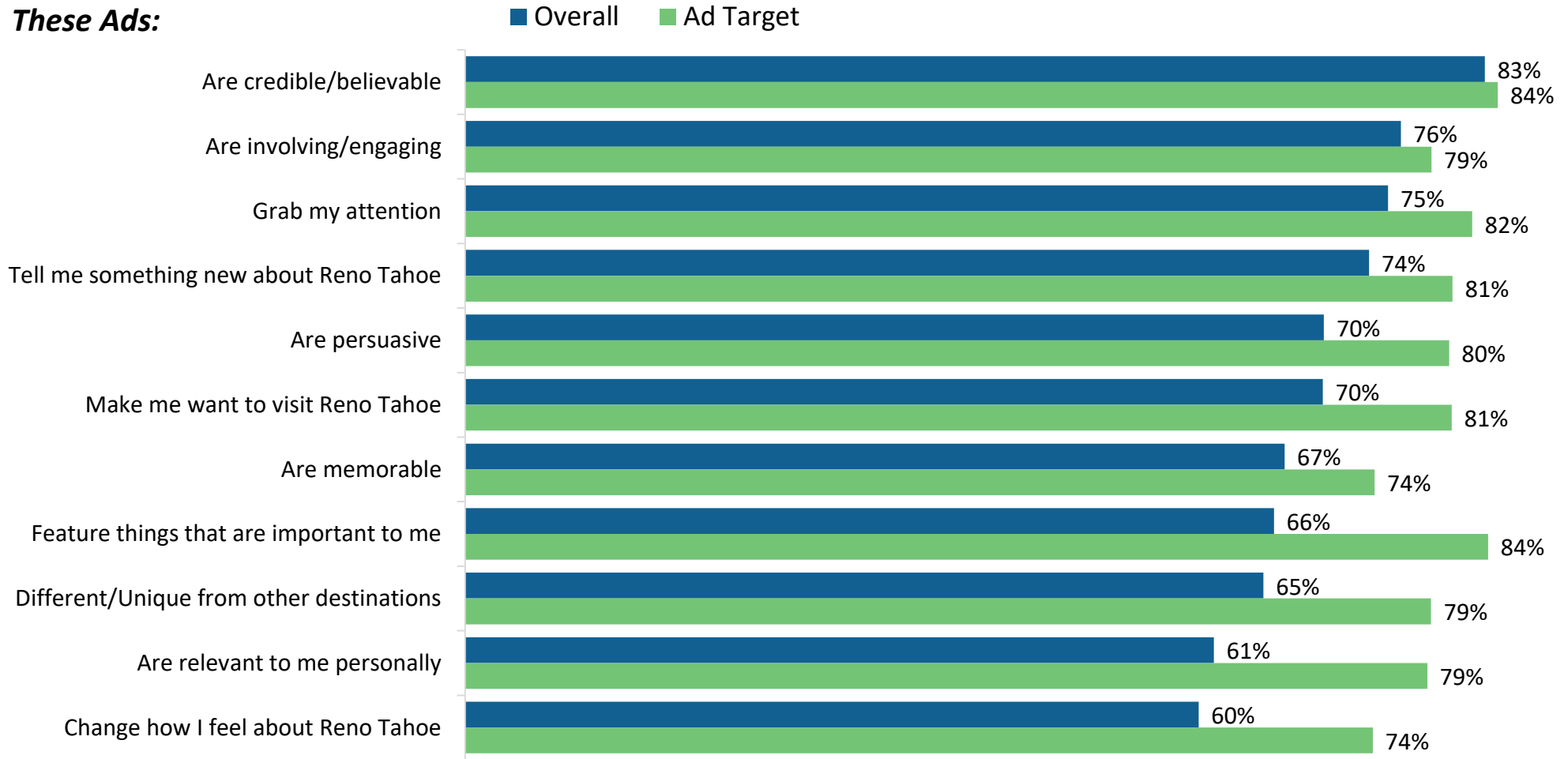
There is relatively little difference in ad ratings between the entire market and the Ad Target in the LA area.



Q54-64. For each of the following statements, please indicate how much you agree or disagree that it describes the ads you just saw and heard.

Reno Tahoe Ad Diagnostics – Seattle

In the Seattle area, ad ratings are especially strong among the Ad Target. Over 8 in 10 among the Seattle Ad Target say the ads feature things that are important to them, are credible/believable, and grab their attention.



Q54-64. For each of the following statements, please indicate how much you agree or disagree that it describes the ads you just saw and heard.



Destination Brand Rating

Destination Brand Rating: Key Findings

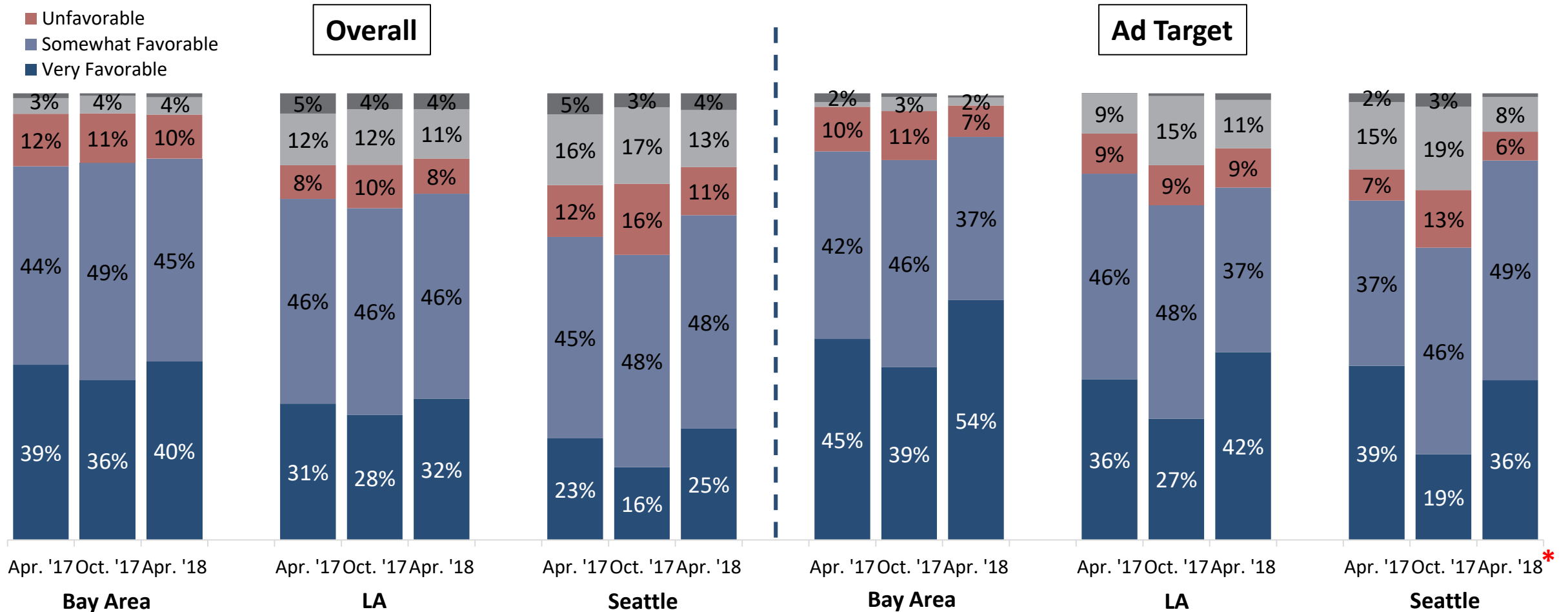
- ▶ Reno Tahoe's destination brand rating remains strong across all markets, especially among the Ad Target and with recent visitors.
- ▶ People who recall seeing an ad recently, or hearing something about Reno Tahoe recently, also have a more positive view of Reno Tahoe.
- ▶ Outdoors, beauty, and fun are key components of the Reno Tahoe brand image.
- ▶ Ratings of Reno/Sparks and the Incline area specifically remain strong as well, with a small increase in the Reno/Sparks rating in the Bay Area.

Reno Tahoe as a Travel Destination

Reno Tahoe continues to have a strong destination brand rating, with some strengthening in the Seattle market Ad Target in particular.

- Never heard of it
- Heard of it but cannot rate it
- Unfavorable
- Somewhat Favorable
- Very Favorable

Please rate your opinion of Reno Tahoe as a travel destination.



Reno Tahoe as a Travel Destination – Recent Visitors

Reno Tahoe's brand rating continues to be stronger among recent visitors.

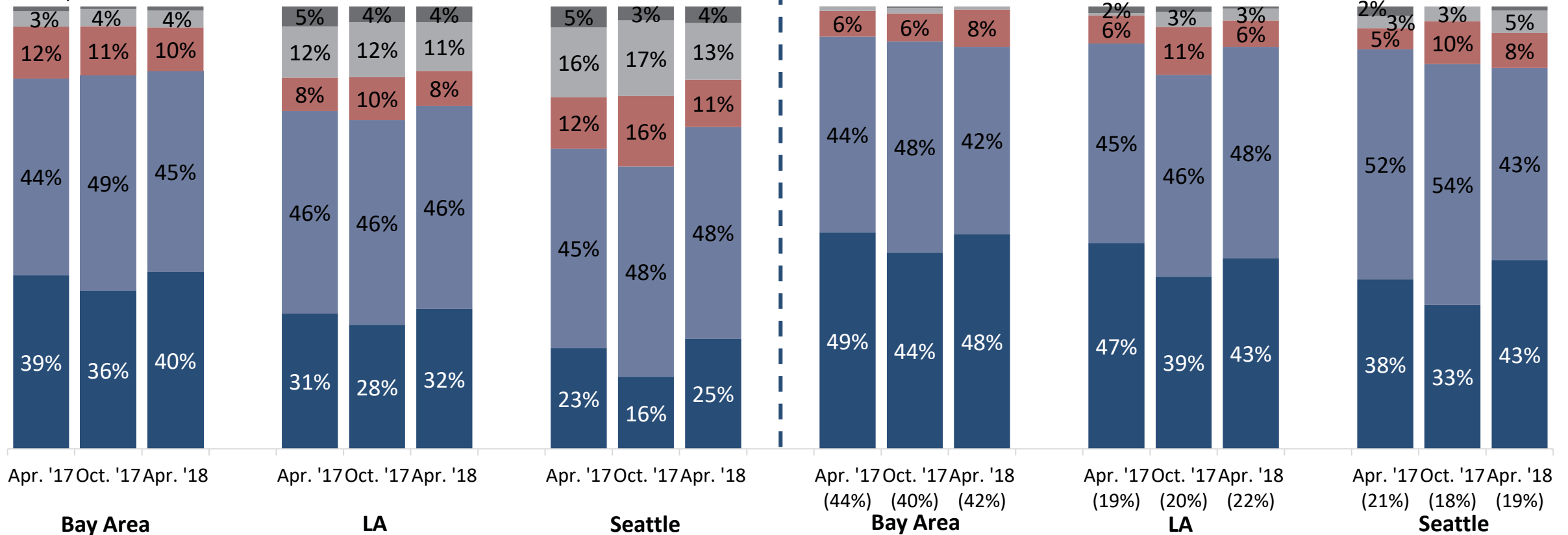
- Never heard of it
- Heard of it but cannot rate it
- Unfavorable
- Somewhat Favorable
- Very Favorable

Please rate your opinion of Reno Tahoe as a travel destination.

Overall

Recent Visitors

(Stayed overnight in last 5 years)



Reno Tahoe as a Travel Destination – Heard About Lately

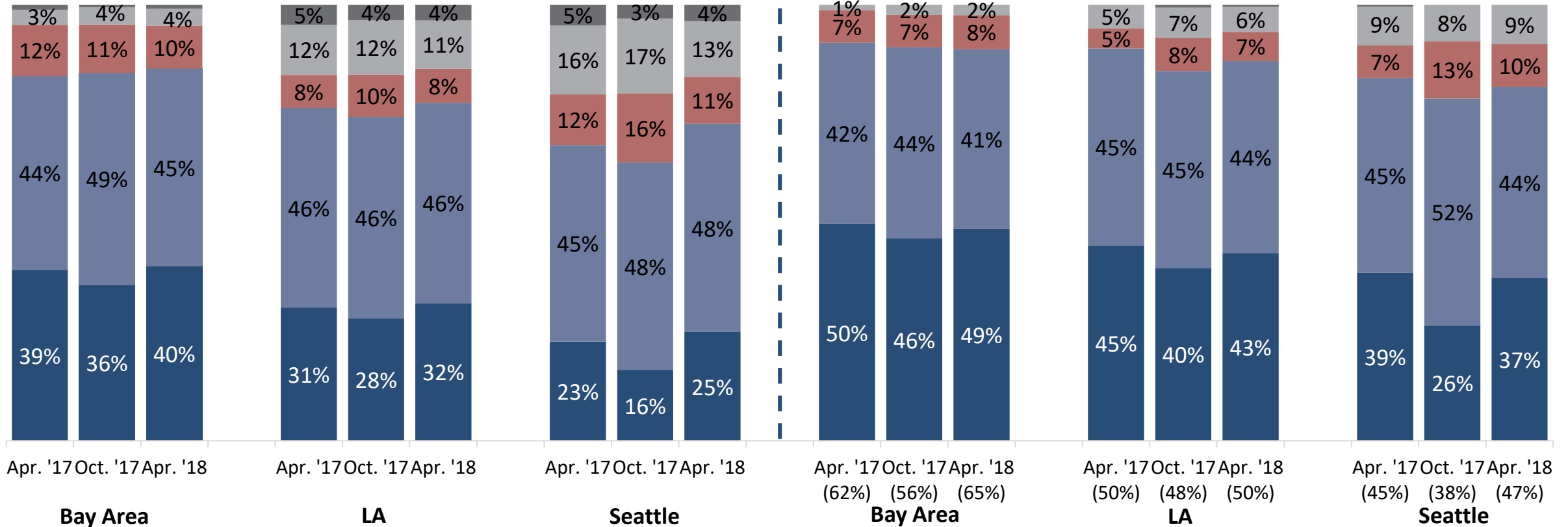
Those who recall hearing something about Reno Tahoe recently have more positive opinions of the destination.

- Never heard of it
- Heard of it but cannot rate it
- Unfavorable
- Somewhat Favorable
- Very Favorable

Please rate your opinion of Reno Tahoe as a travel destination.

Overall

Seen/Heard about Reno Tahoe Lately

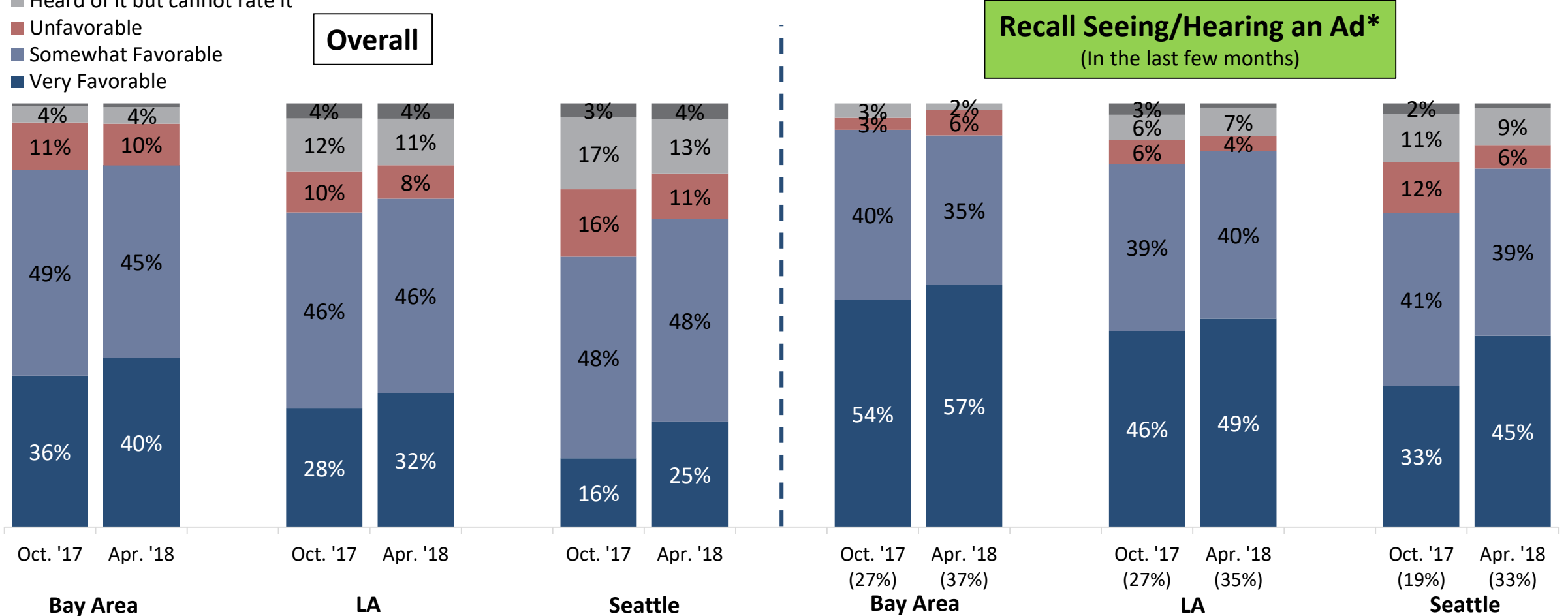


Reno Tahoe as a Travel Destination – Recall Ad

Those who recall seeing or hearing an advertisement in the last few months hold a highly favorable views of Reno Tahoe as a travel destination.

- Never heard of it
- Heard of it but cannot rate it
- Unfavorable
- Somewhat Favorable
- Very Favorable

Please rate your opinion of Reno Tahoe as a travel destination.



*Questions 50-52 (Aided Ad Awareness) were not asked in April 2017.

Reno Tahoe Personality Characteristics

“Active,” “lively,” and “free-spirited” are top Reno Tahoe personality traits.

Thinking about the Reno Tahoe travel destination as if it were a person, which characteristics best reflect its personality?	Bay Area	Los Angeles	Seattle
Active	51%	45%	46%
Lively	43%	39%	37%
Free-spirited	35%	38%	29%
Western	26%	24%	33%
Spontaneous	24%	23%	20%
Old	18%	15%	17%
Rough around the edges	16%	13%	18%
Magnetic	12%	12%	9%
Offbeat	10%	12%	13%
Ambitious	10%	11%	10%
Has swagger	10%	8%	11%
Tacky	10%	6%	10%
Dirty/run down	8%	6%	8%
Gritty	7%	8%	9%
Boring/dull	7%	5%	7%

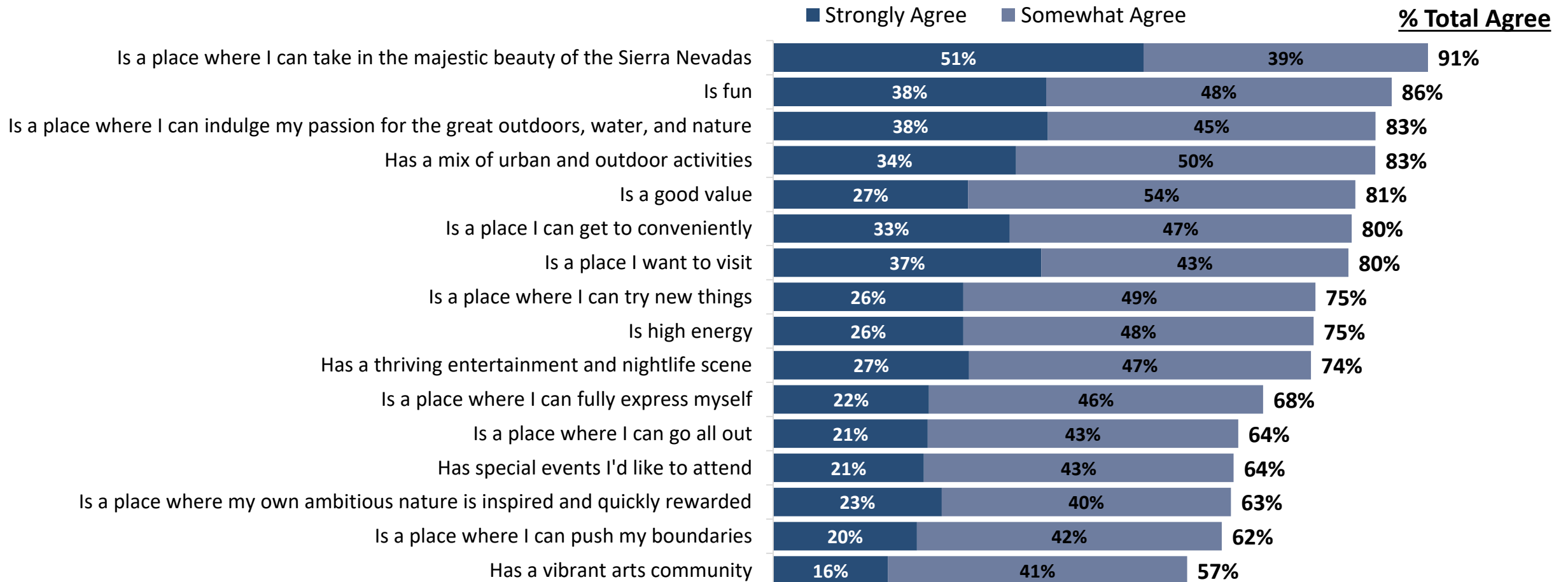
Q18. Thinking about the Reno Tahoe travel destination as if it were a person, which characteristics best reflect its personality? Please check all that apply.

*Multiple responses were accepted to Q18. Table only displays data for April 2018.
18-6777; 18-6778; 18-6779 RSCVA Brand Tracking Surveys – Spring 2018 | 45*

Reno Tahoe Brand Attributes – Bay Area

The Reno Tahoe attributes that receive the most intense ratings in the Bay Area are about nature, the outdoors, and fun.

How much do you agree or disagree that each describes Reno Tahoe?

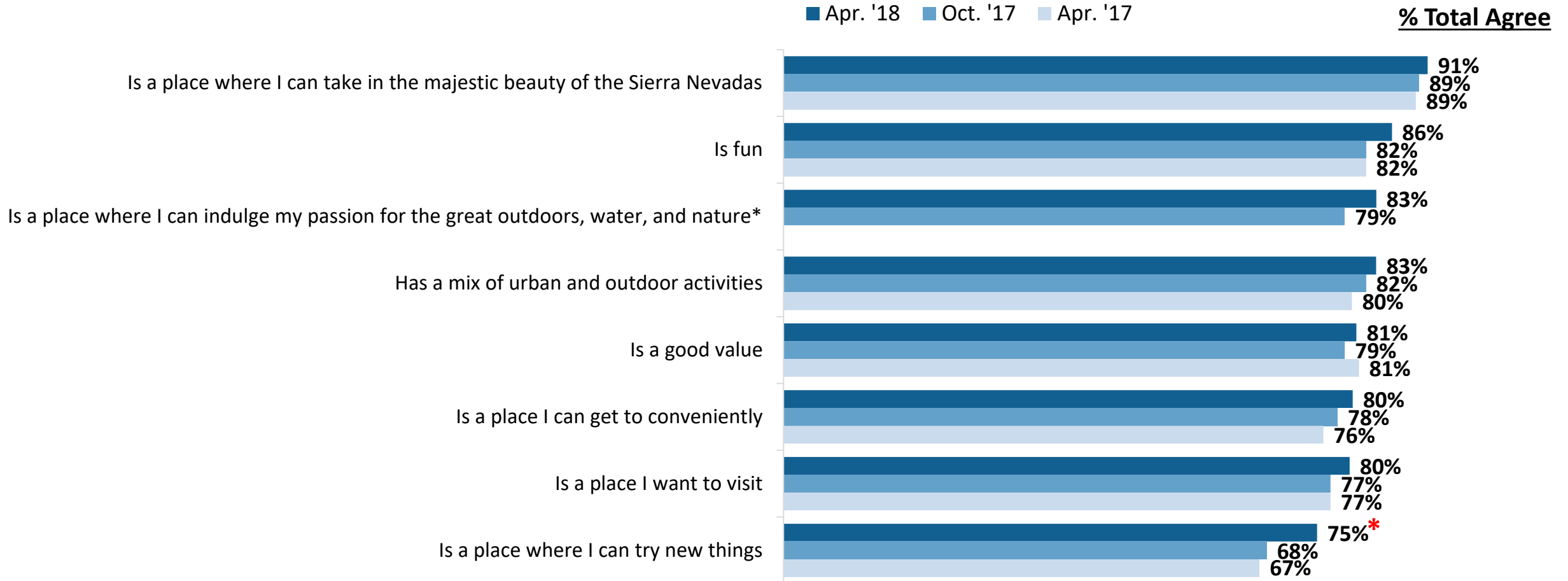


Q19-34. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

Reno Tahoe Brand Attributes – Bay Area

Many Reno Tahoe attributes are rated strongly in the Bay Area. There has been a statistically significant increase in “Is a place where I can try new things.”

How much do you agree or disagree that each describes Reno Tahoe?



Q19-34. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

(*was not asked in Apr. '17)

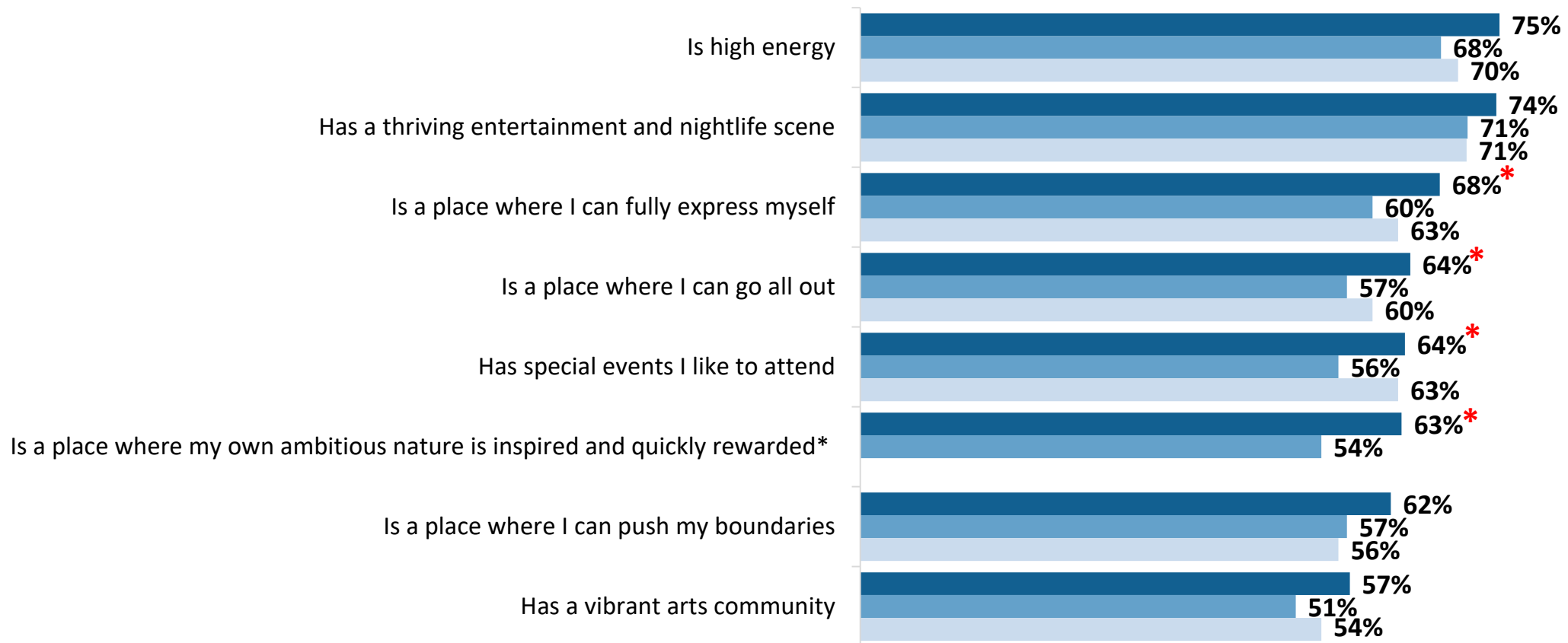
Reno Tahoe Brand Attributes – Bay Area (cont.)

There may be seasonal variation in “special event” ratings in the Bay Area market.

How much do you agree or disagree that each describes Reno Tahoe?

■ Apr. '18 ■ Oct. '17 ■ Apr. '17

% Total Agree



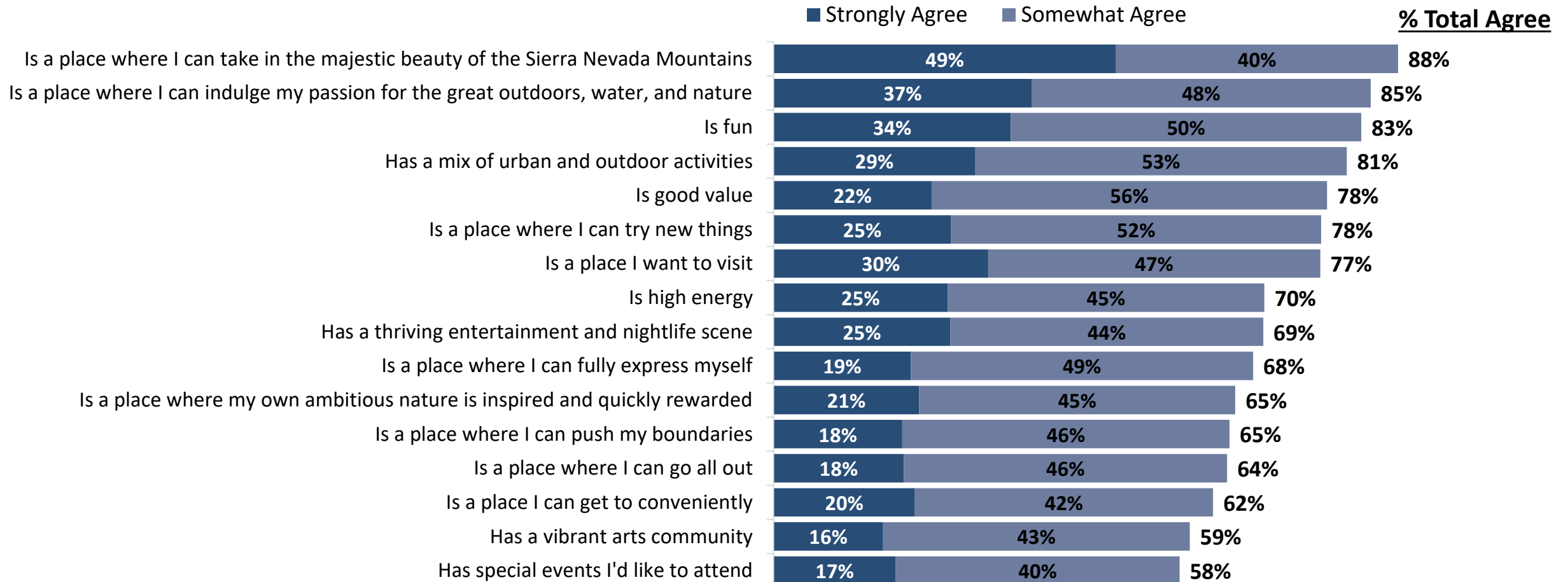
Q19-34. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

(*was not asked in Apr. '17)

Reno Tahoe Brand Attributes – LA

In the LA market, the strongest Reno Tahoe brand attributes are about nature and fun.

How much do you agree or disagree that each describes Reno Tahoe?

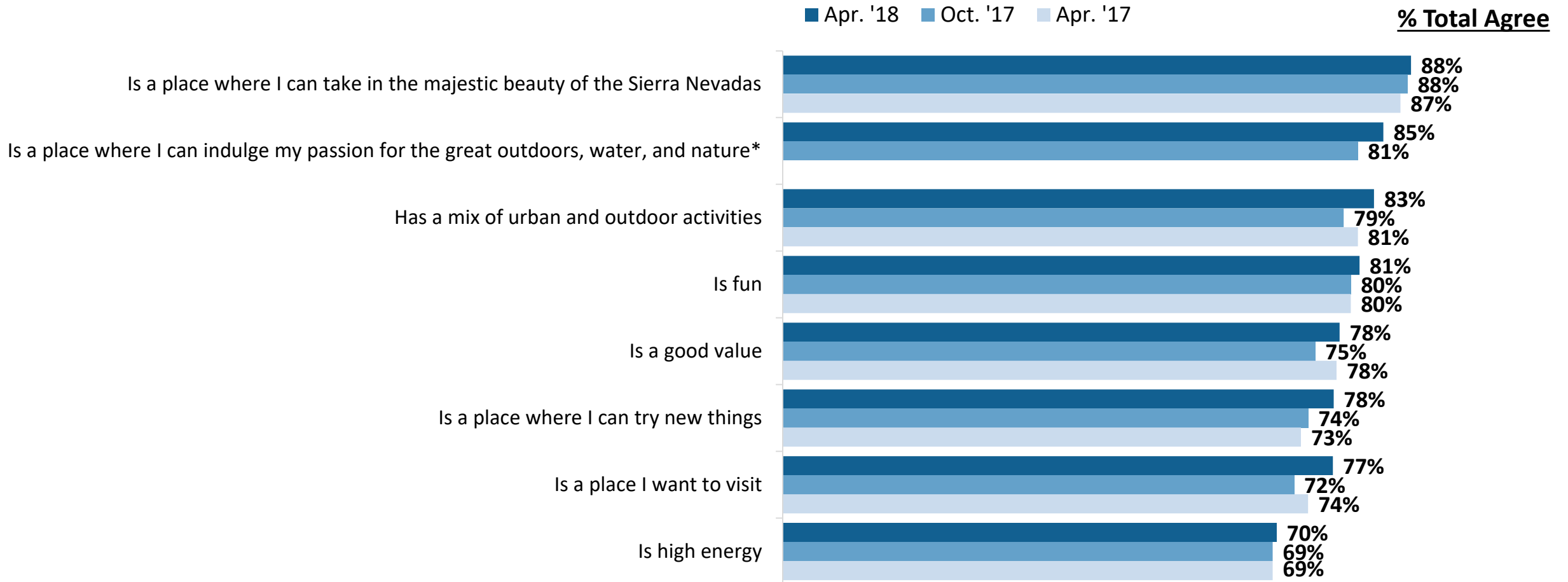


Q19-34. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

Reno Tahoe Brand Attributes – LA

Many top attribute ratings have remained consistent in the LA market.

How much do you agree or disagree that each describes Reno Tahoe?



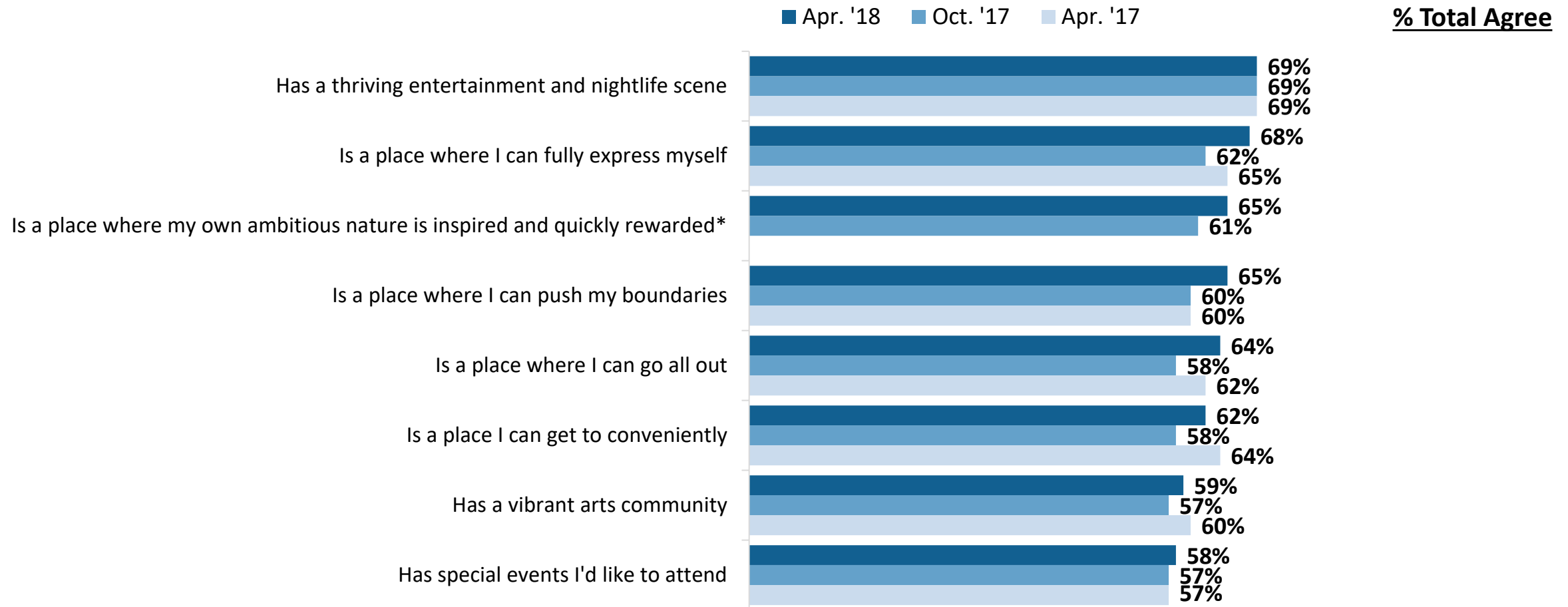
Q19-34. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

(*was not asked in Apr. '17)

Reno Tahoe Brand Attributes – LA (cont.)

In the LA market, just under two thirds agree that Reno Tahoe is a place where their own ambitious nature is inspired and quickly rewarded.

How much do you agree or disagree that each describes Reno Tahoe?



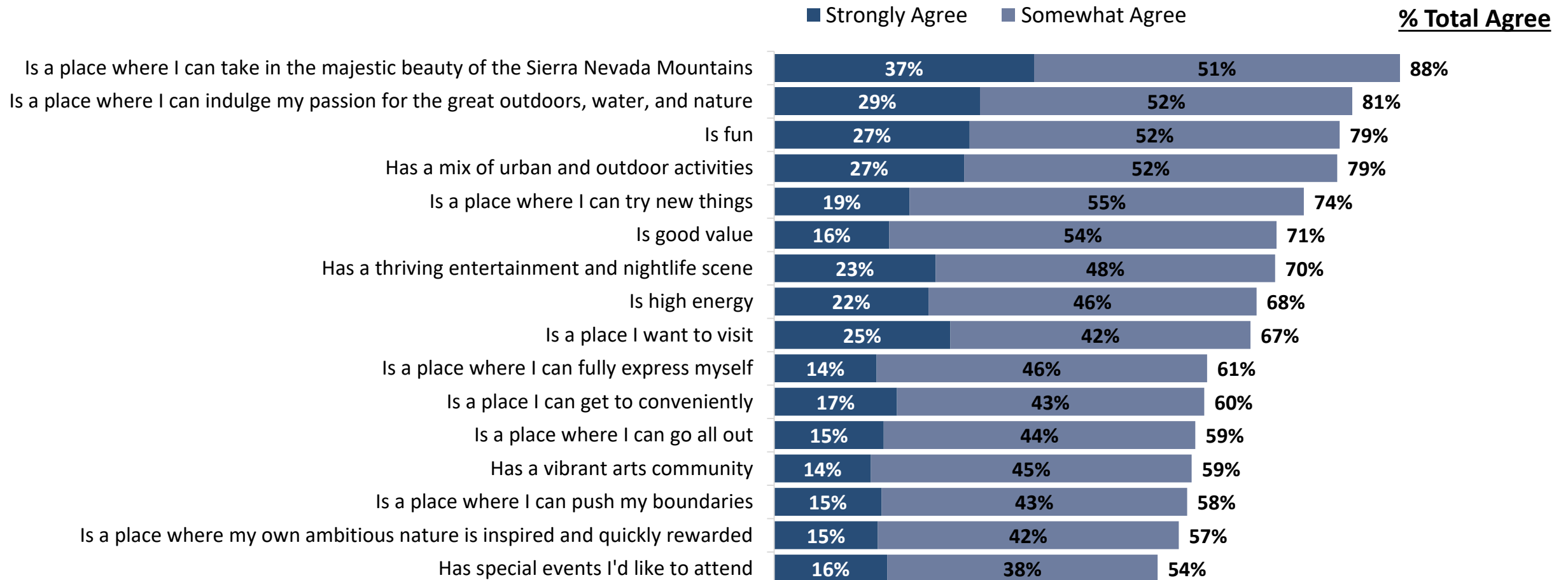
Q19-34. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

(*was not asked in Apr. '17)

Reno Tahoe Brand Attributes – Seattle

Few Reno Tahoe brand attributes receive much intensity in the Seattle market.

How much do you agree or disagree that each describes Reno Tahoe?

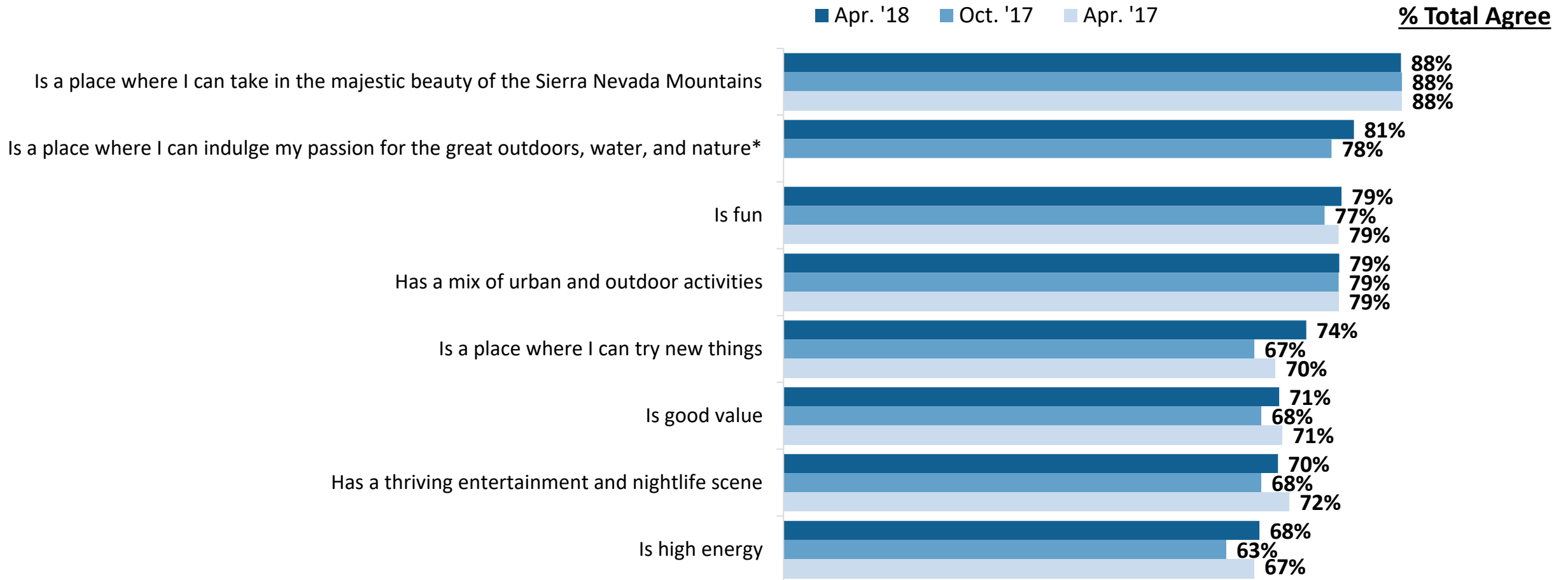


Q19-34. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

Reno Tahoe Brand Attributes – Seattle

In the Seattle market, top Reno Tahoe brand attributes continue to be about nature, the outdoors, and fun.

How much do you agree or disagree that each describes Reno Tahoe?



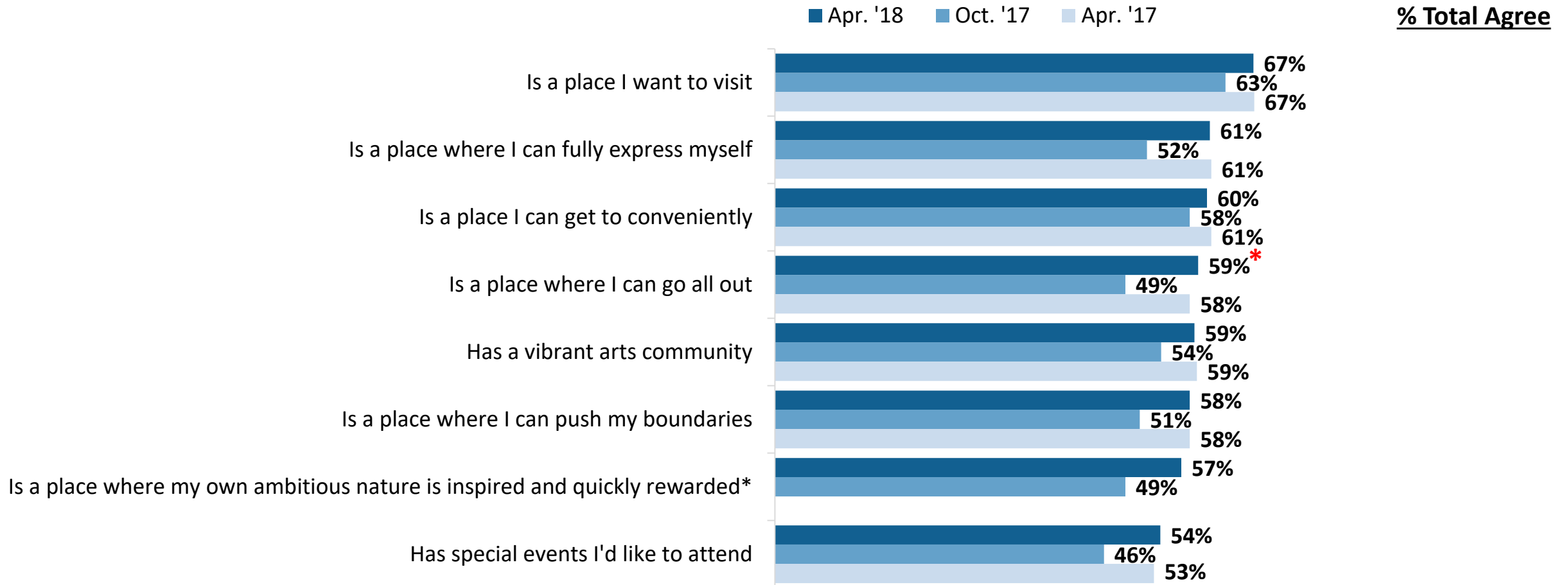
Q19-34. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

(*was not asked in Apr. '17)

Reno Tahoe Brand Attributes – Seattle (cont.)

“Has special events I’d like to attend” continues to be Reno Tahoe’s weakest attribute in the Seattle market.

How much do you agree or disagree that each describes Reno Tahoe?



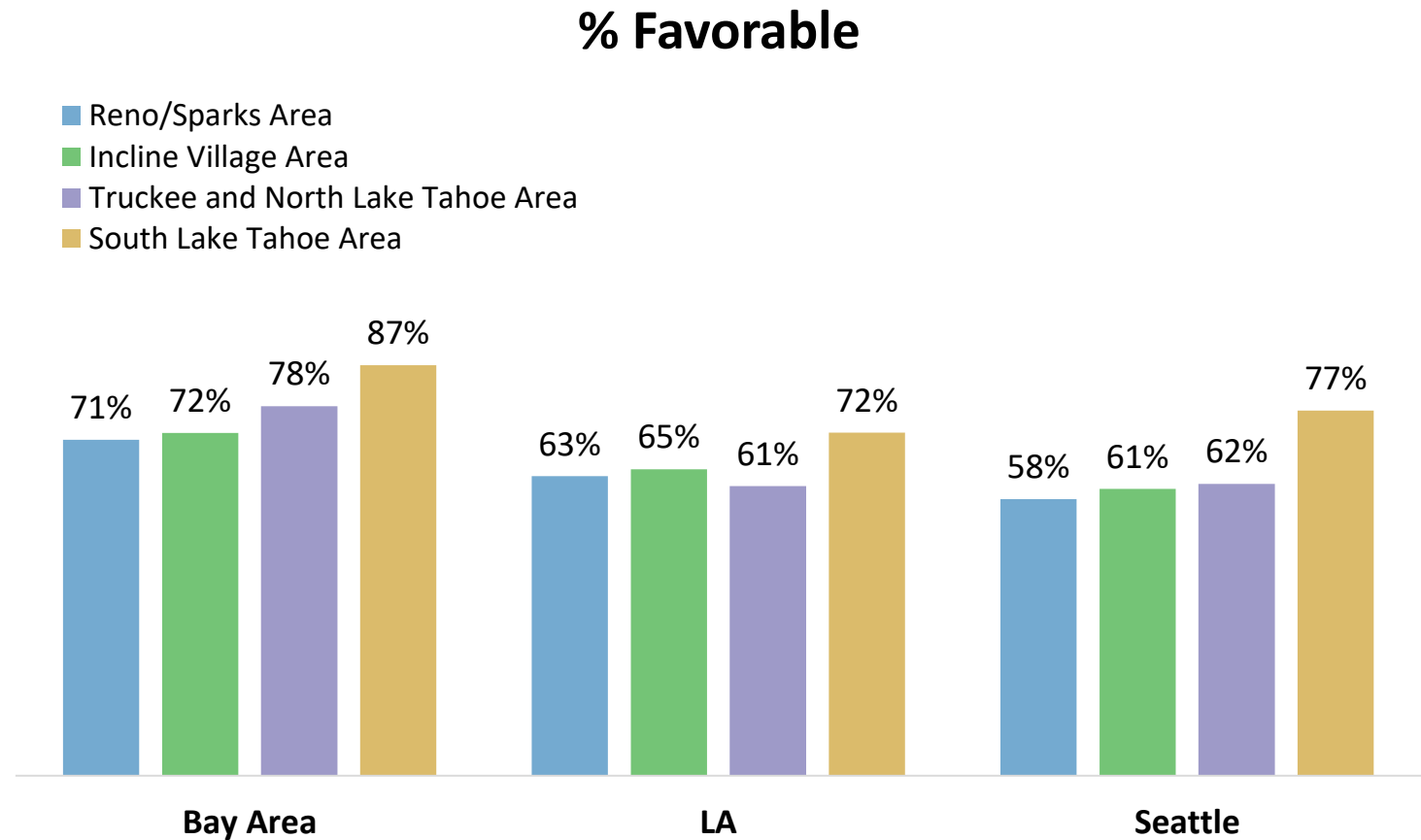
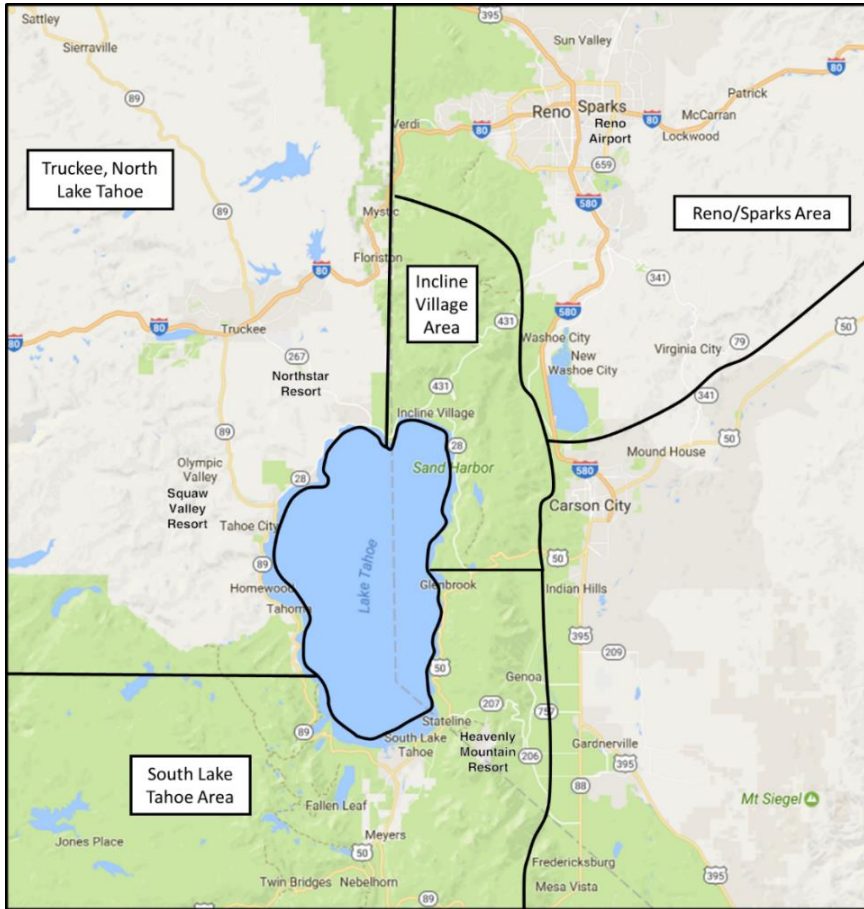
Q19-34. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

(*was not asked in Apr. '17)

Lake Tahoe Area Travel Destination Ratings

When looking at specific parts of the area, South Lake Tahoe has the strongest destination brand rating in all markets.

Respondents were shown the map below and asked to give a rating of each labeled travel destination.

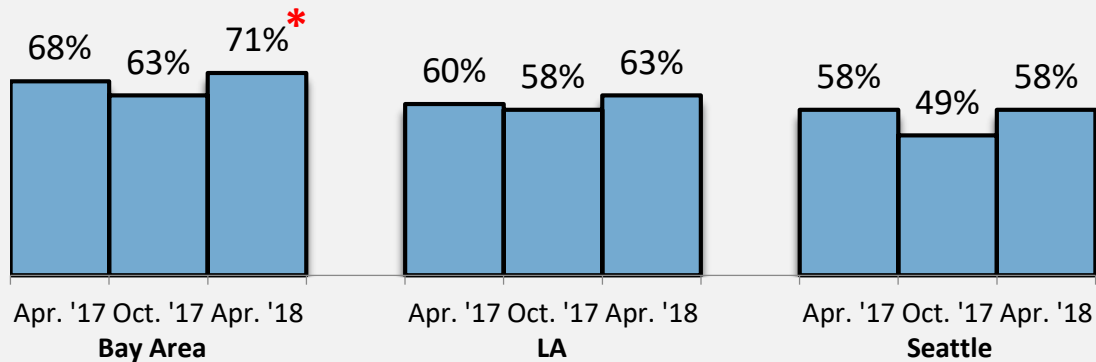


Data only displayed for April 2018.

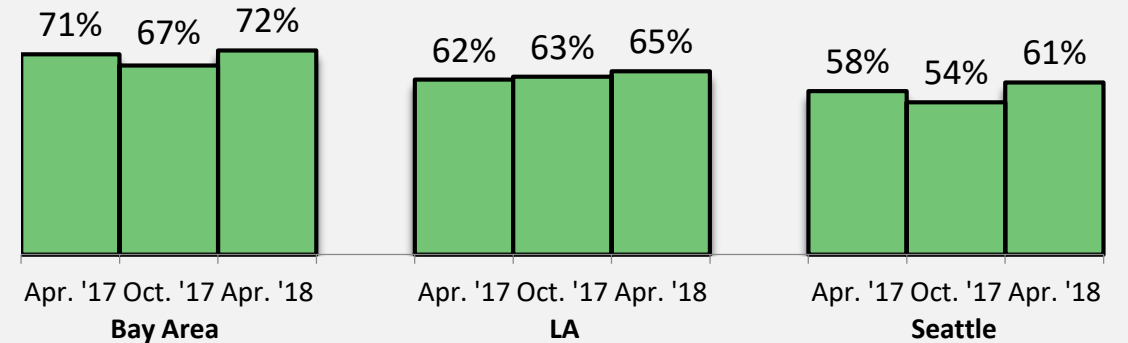
Lake Tahoe Area Travel Destination Ratings Over Time

Destination ratings for the individual parts of the Tahoe area remain mostly consistent, with a modest increase in positive rating for Reno/Sparks in the Bay Area.

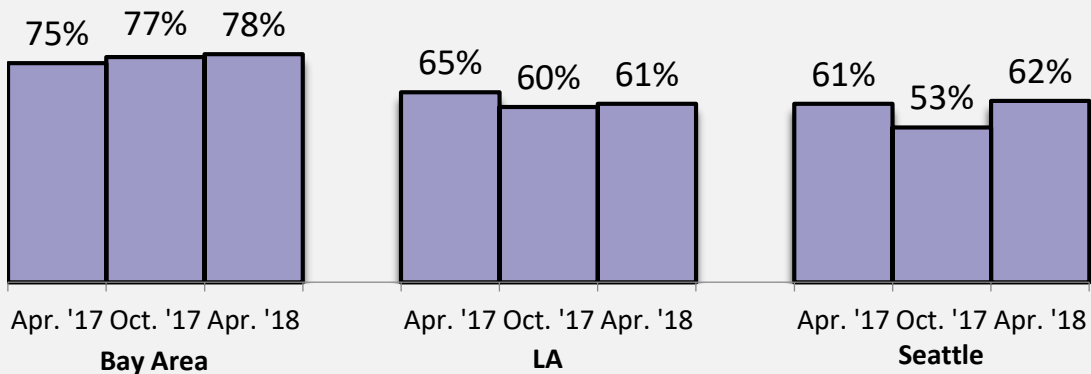
Reno Sparks Area Favorability (% Fav)



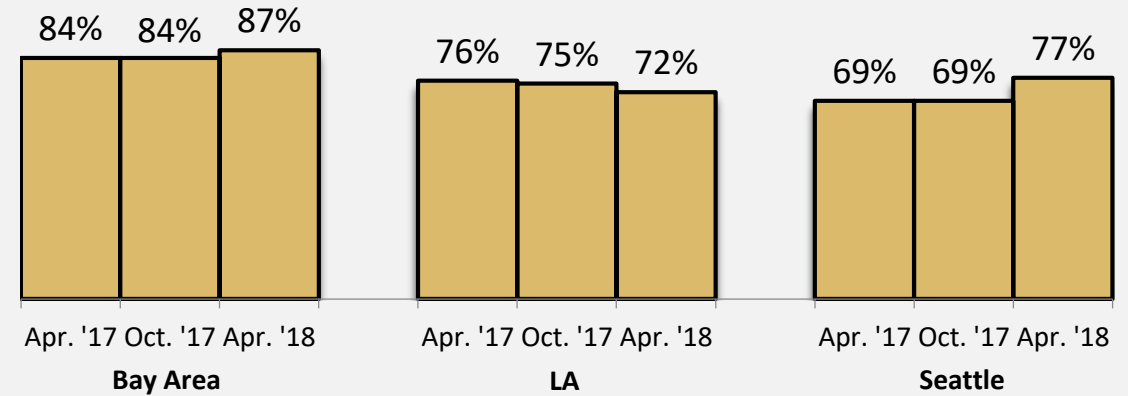
Incline Village Area Favorability (% Fav)



Truckee & North Lake Tahoe Favorability (% Fav)



South Lake Tahoe Area Favorability (% Fav)





**Desire to Visit, Intent to Visit,
and Past Visitation**

Desire, Intent, & Past Visitation: Key Findings

- ▶ Those in the Ad Target population continue to report a strong desire and intent to visit Reno Tahoe.
- ▶ Similarly, those who recall ads are much more likely to have both desire and intent to visit Reno Tahoe.
- ▶ Past 5 year visitation remains steady in all markets, with Seattle residents more likely to have visited the Reno/Sparks area than any other part of the Lake Tahoe region.
- ▶ While the Bay Area has the largest proportion of potential repeat visitors, two-in-five from LA can be identified as potential new visitors, along with one-in-three in the Seattle area.

Desire to Visit Reno Tahoe

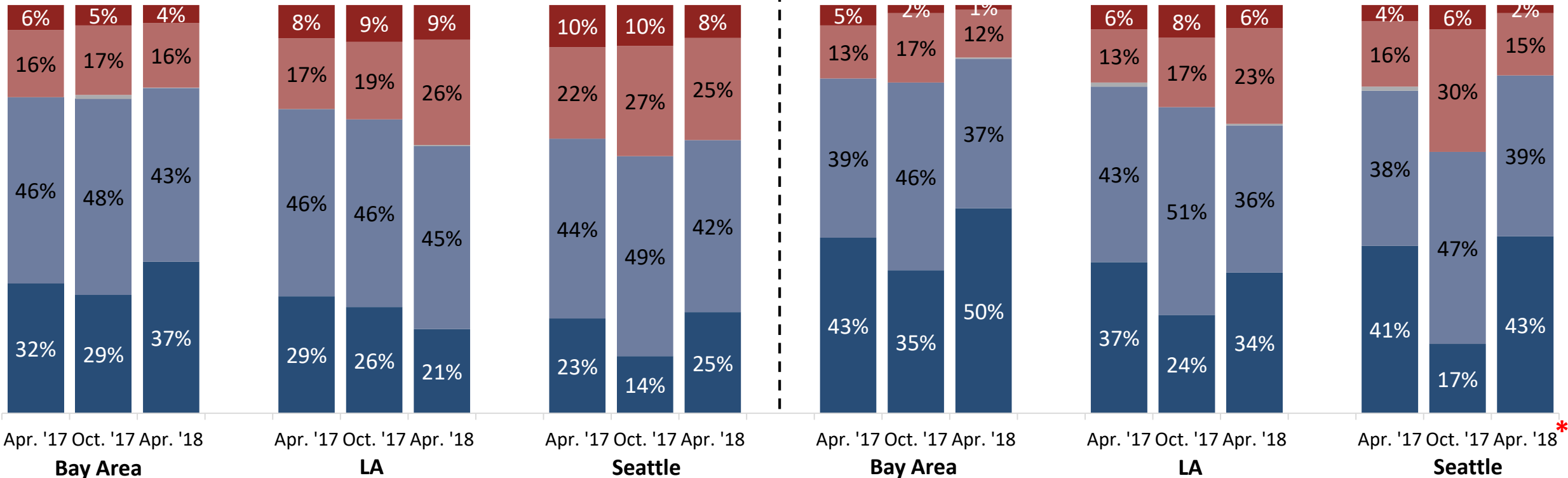
Those in the Ad Target continue to report a stronger desire to visit Reno Tahoe than the general population, across all three markets.

- Strongly Disagree
- Somewhat Disagree
- (No Response)
- Somewhat Agree
- Strongly Agree

Overall

Agree/Disagree: Reno Tahoe is a place I want to visit.

Ad Target



Q19. For each of the following statements, please indicate how much you agree or disagree that it describes Reno Tahoe.

Stated Intent to Visit Reno Tahoe

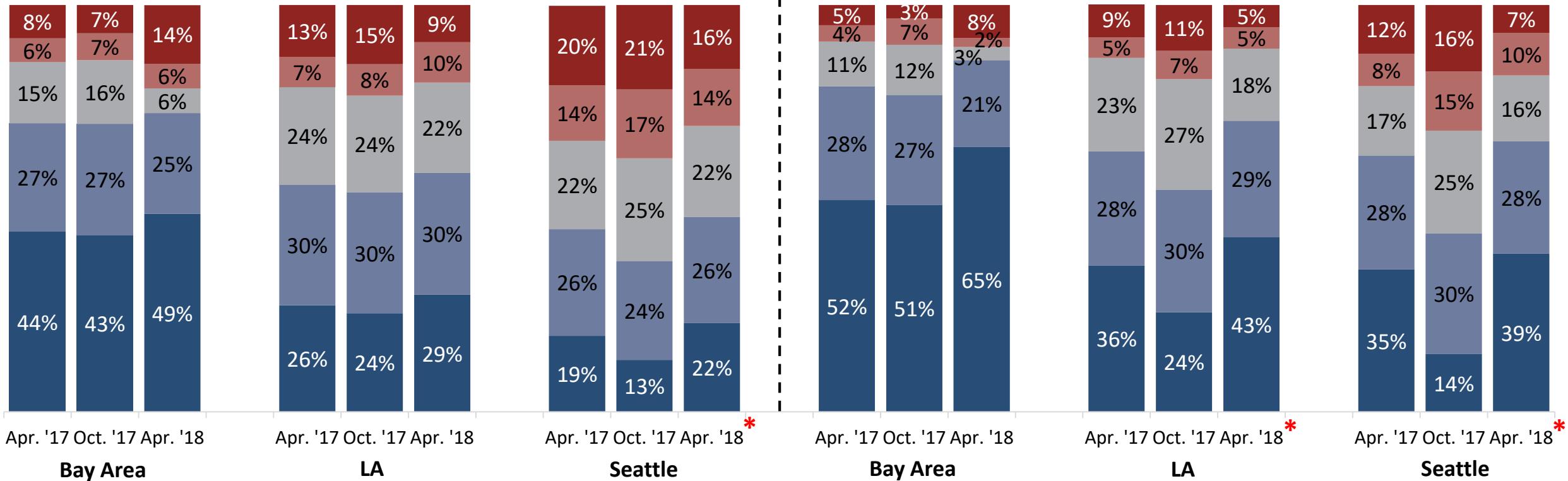
Stated intent to visit Reno Tahoe is up in Seattle, as well as in the LA Ad Target population.

- Very Unlikely
- Somewhat Unlikely
- Neither Likely Nor Unlikely
- Somewhat Likely
- Very Likely

Overall

How likely are you to visit Reno Tahoe in the next two years?

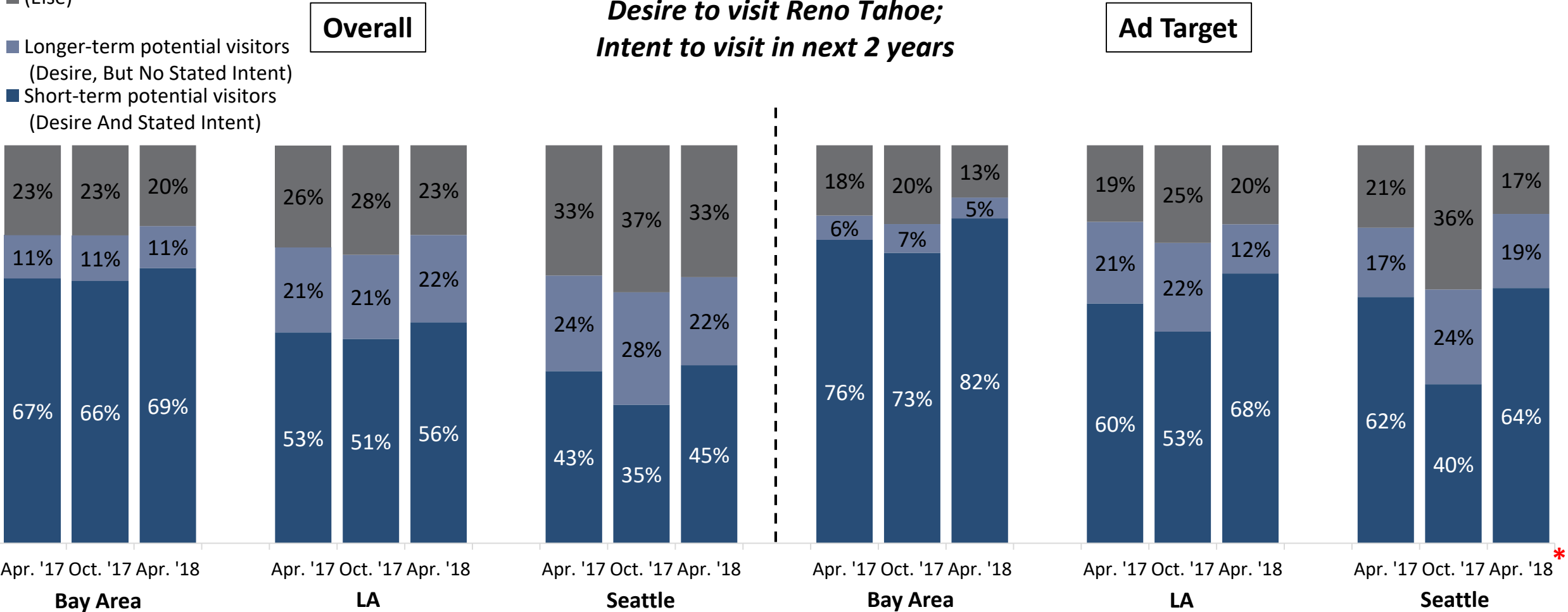
Ad Target



Desire and Stated Intent to Visit Segmentation

In all three markets, members of the Ad Target are more likely to be short-term or longer-term potential visitors than the overall population.

- (Else)
- Longer-term potential visitors (Desire, But No Stated Intent)
- Short-term potential visitors (Desire And Stated Intent)



Desire and Stated Intent to Visit Segmentation

In all three markets, those who recall seeing or hearing ads recently continue to be more likely to be short-term visitors than the general population.

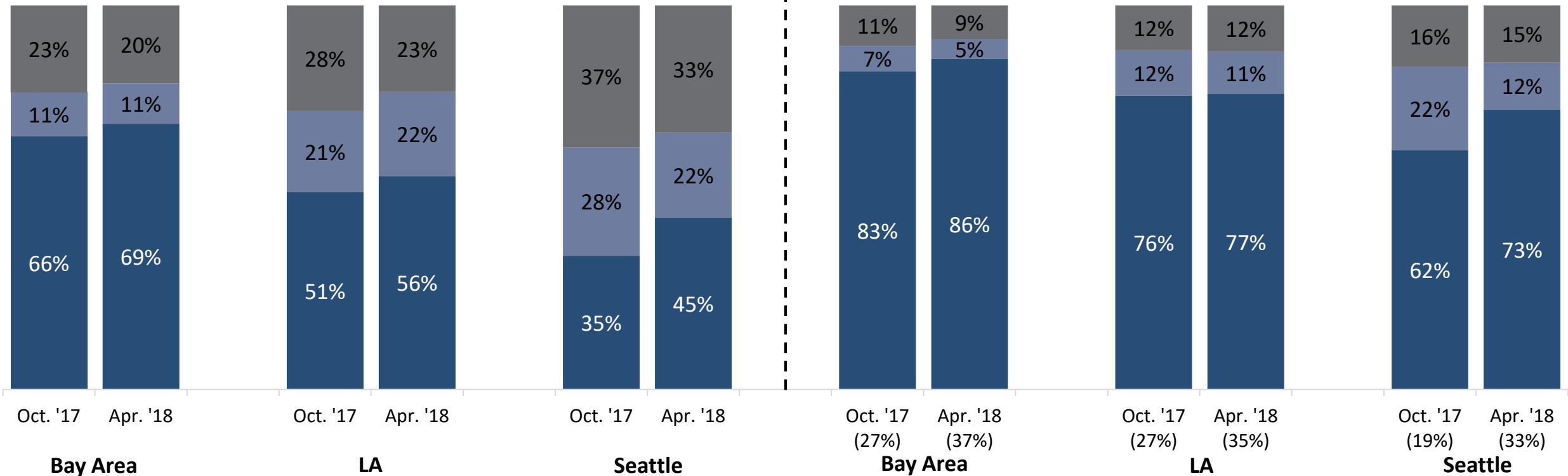
- (Else)
- Longer-term potential visitors (Desire, But No Stated Intent)
- Short-term potential visitors (Desire And Stated Intent)

Overall

***Desire to visit Reno Tahoe;
Intent to visit in next 2 years***

Recall Seeing/Hearing an Ad*
(In the last few months)

**Questions 50-52 (Aided Ad Awareness) were not asked in April 2017.*



Reasons Why Not Likely to Visit

Among those who are unlikely to visit Reno Tahoe in the next two years, most say they don't like it or prefer other places.

"I've always had the impression that it's kind of a tacky, low-rent vacation spot."
-59 year-old white man; Bay Area

"As a family with young children it's not on the top of my list for child friendly vacations"
-33 year-old white woman; Seattle

"I have a stronger preference for Las Vegas and they offer similar amenities."
-50 year-old white man; Seattle

"It doesn't seem like the type of place I would visit since I'm not an outdoors person."
-26 year-old African American woman, LA

And what would you say is the main reason you are not likely to visit Reno Tahoe in the next two years? Be as specific as possible.	Bay Area (n=121)	LA (n=177)	Seattle (n=134)
Don't like it/Not appealing	35%	23%	27%
Prefer other places	26%	37%	33%
Activities aren't interesting	22%	14%	21%
Too far	13%	16%	6%
Been there before	13%	7%	15%
Don't know enough about it	6%	10%	5%
Expensive/Don't want to spend money here	5%	4%	4%
Busy/Don't have time	2%	3%	3%
Don't have anyone to go with	0%	3%	3%
Can't travel a lot	0%	2%	1%
Too old	0%	2%	3%

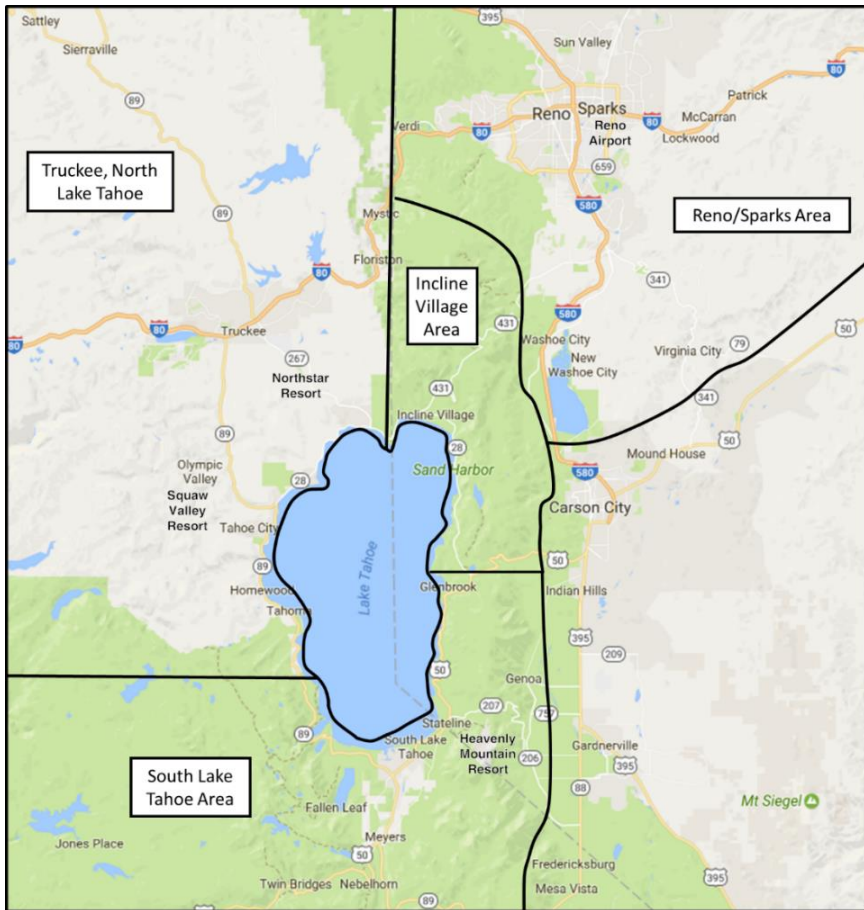
Q36. What would you say is the main reason you are not likely to visit Reno Tahoe in the next two years? Be as specific as possible.

Q36 was asked for the first time in April '18. Multiple responses were accepted.

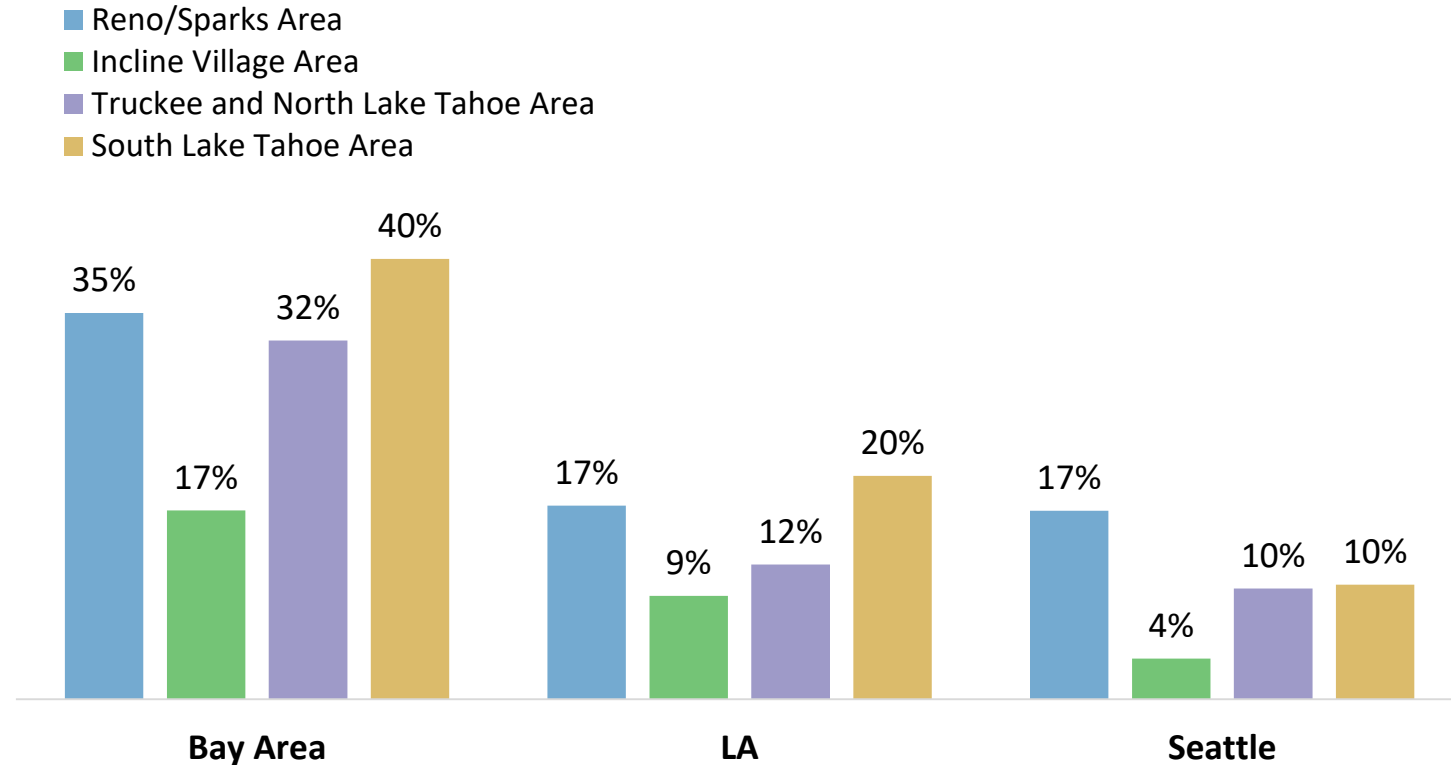
Reno-Lake Tahoe Area Past Visitation

More Seattle area residents visited Reno/Sparks than any other part of the Lake Tahoe region, while South Lake Tahoe was the most frequently visited by Bay Area and LA visitors.

Respondents were shown the map below and asked to select regions they have visited.



% Visited Last 5 Years



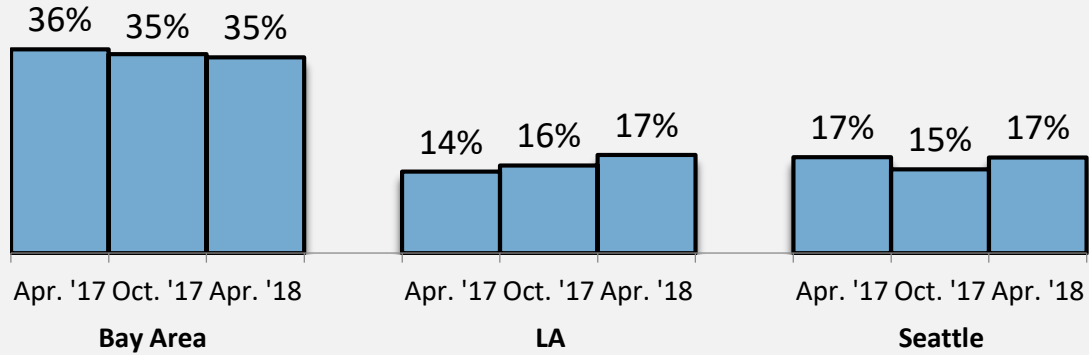
Q45-46. In the past five years, how many nights would you say you have spent in the following areas? If you aren't sure, please just give your best guess.

Data only displayed for April 2018.

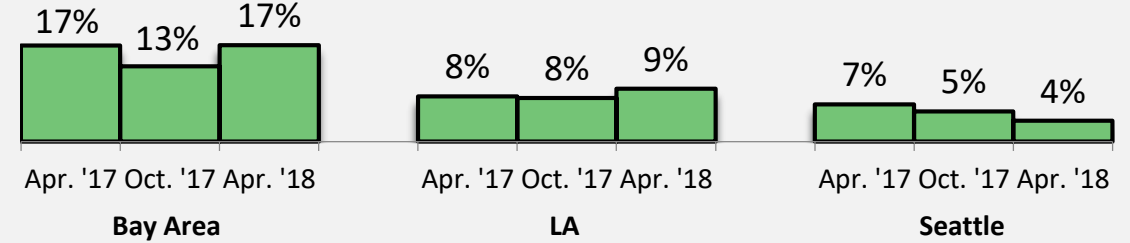
Reno-Lake Tahoe Area Past Visitation Over Time

Self-reported visitation to the Reno-Lake Tahoe area has been consistent over time.

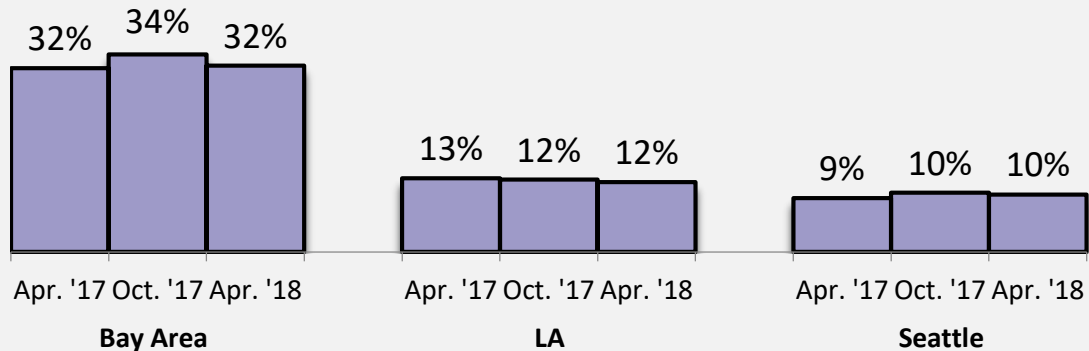
Reno Sparks Area (% Visited in Last 5 Years)



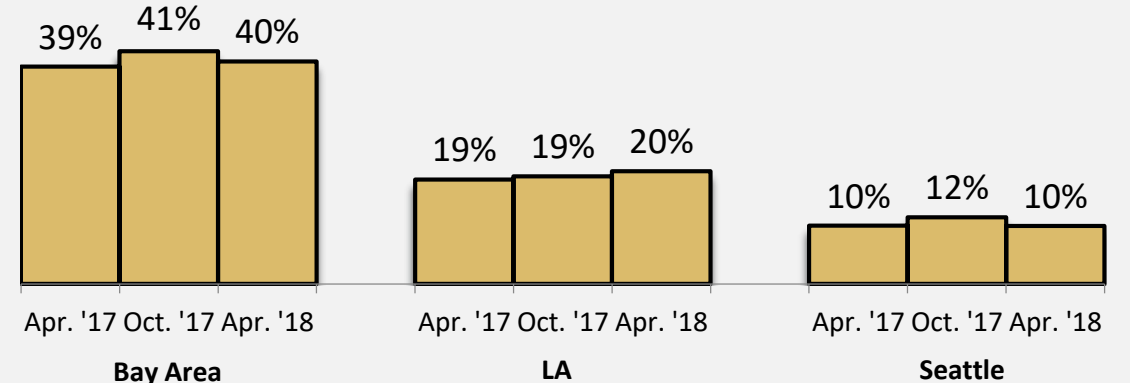
Incline Village Area (% Visited in Last 5 Years)



Truckee/North Lake Tahoe (% Visited in Last 5 Years)



South Lake Tahoe Area (% Visited in Last 5 Years)



Q45-46. In the past five years, how many nights would you say you have spent in the following areas? If you aren't sure, please just give your best guess.

Lake Tahoe Area Past Visitation

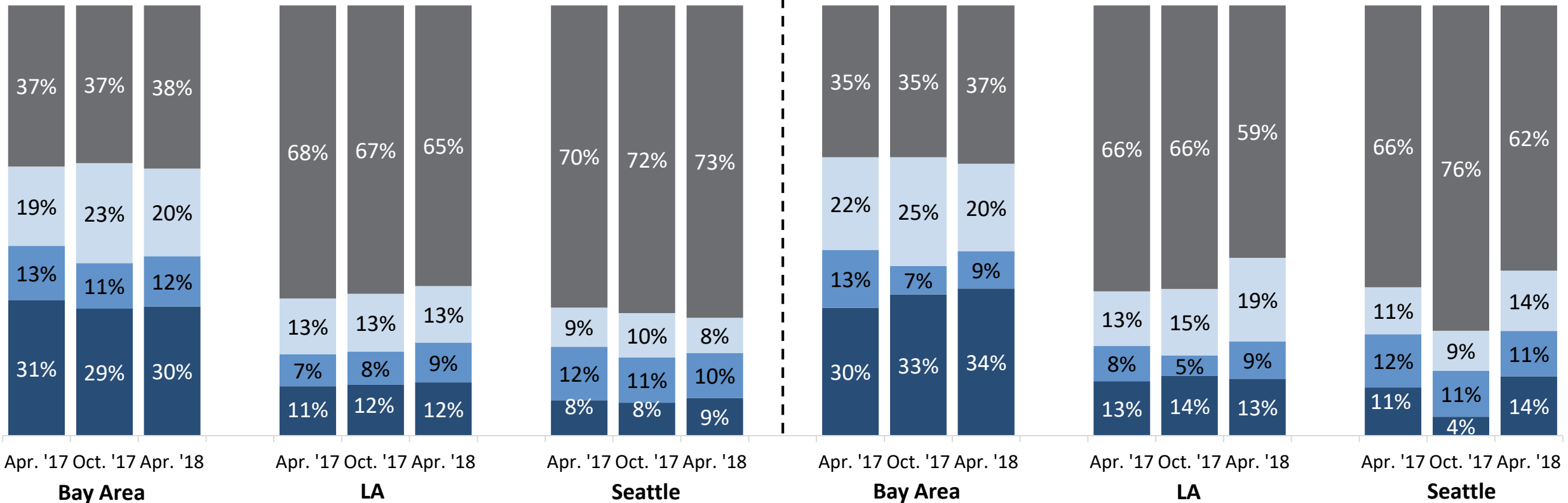
Most Bay Area residents have visited at least one part of Lake Tahoe in the last 5 years.

- Have not visited either
- Other Lake Tahoe Only
- Reno Tahoe Only
- Reno Tahoe AND Other Lake Tahoe

Overall

Visitation in the past 5 years

Ad Target

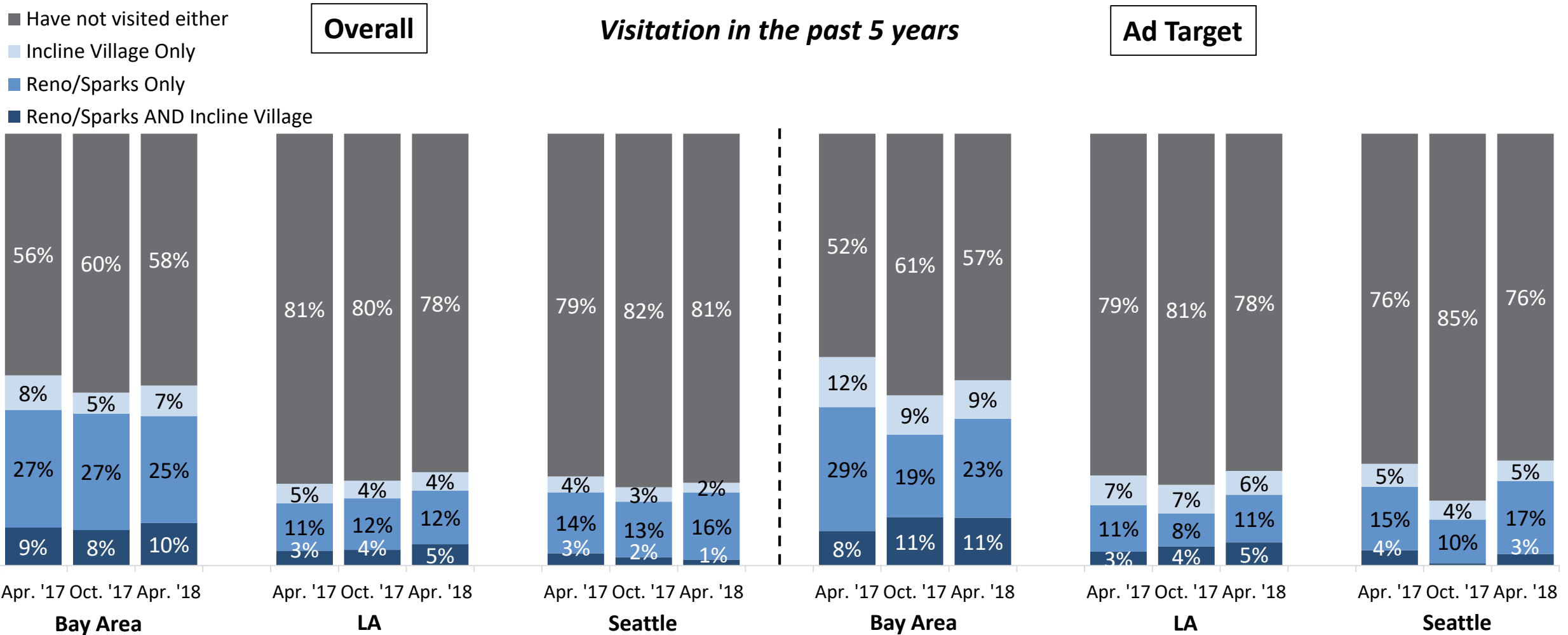


Q45-46. In the past five years, how many nights would you say you have spent in the following areas? If you aren't sure, please just give your best guess.

Reno Tahoe Past Visitation

In all three markets, there is no significant difference in past Reno Tahoe visitation between the overall population and the Ad Target.

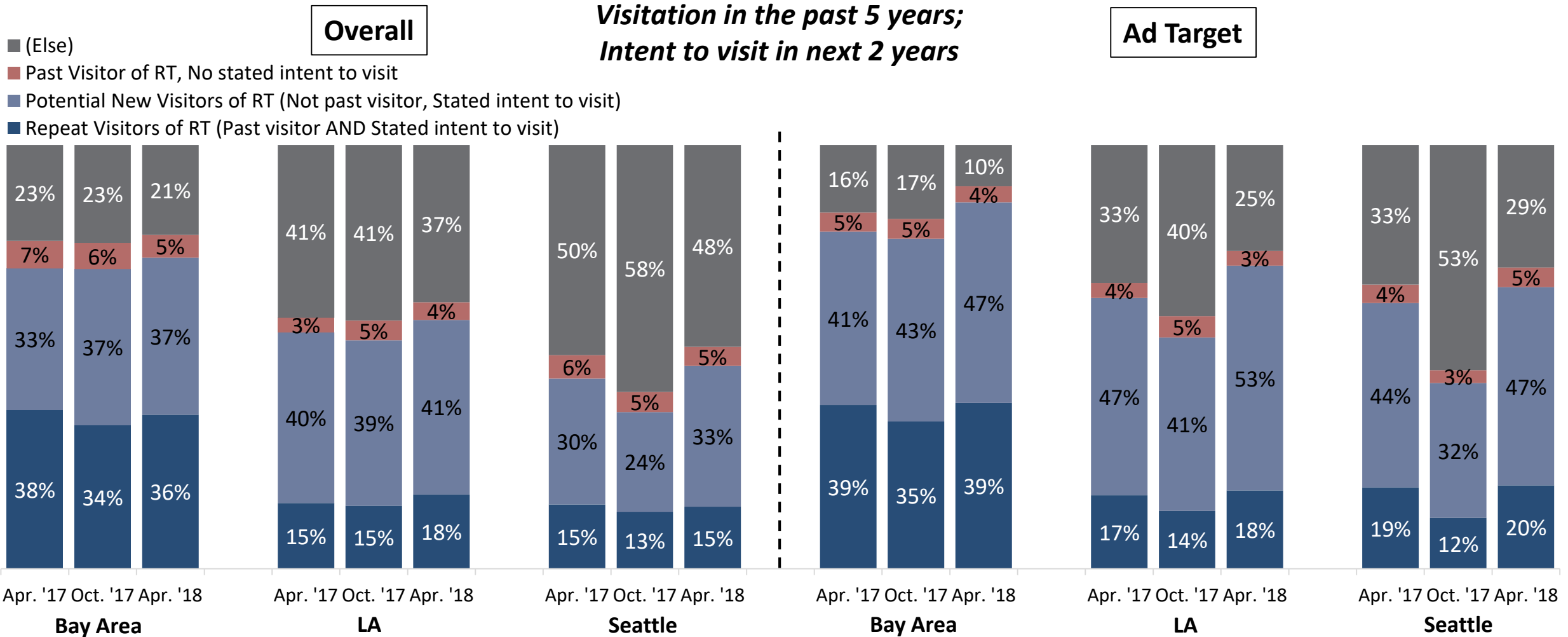
- Have not visited either
- Incline Village Only
- Reno/Sparks Only
- Reno/Sparks AND Incline Village



Q45-46. In the past five years, how many nights would you say you have spent in the following areas? If you aren't sure, please just give your best guess.

Reno Tahoe Visitation & Intent to Visit Segmentation

About half of the Ad Target are potential new visitors across all three markets.





**Conclusions &
Next Steps**

Conclusions

- ▶ Key indicators of Reno Tahoe's destination brand strength continue to be strong across all markets.
 - Potential for improvement for brand strength indicators is limited given current levels, but we do see some modest increases in the Ad Target populations for desire and intent to visit Reno Tahoe in Seattle and LA.
- ▶ Awareness of the advertising campaign has climbed in all three markets, both with the Ad Target and general populations. The campaign continues to resonate with Ad Target consumers based on diagnostic indicators and stated actions.
- ▶ Coinciding increases in advertising awareness and intent to visit among Ad Target populations is a good indicator that the campaign is having the desired impact.



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