

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

Executive Summary Presentation
Board of Directors - July 26, 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



Tracking Survey 2	Overall 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%

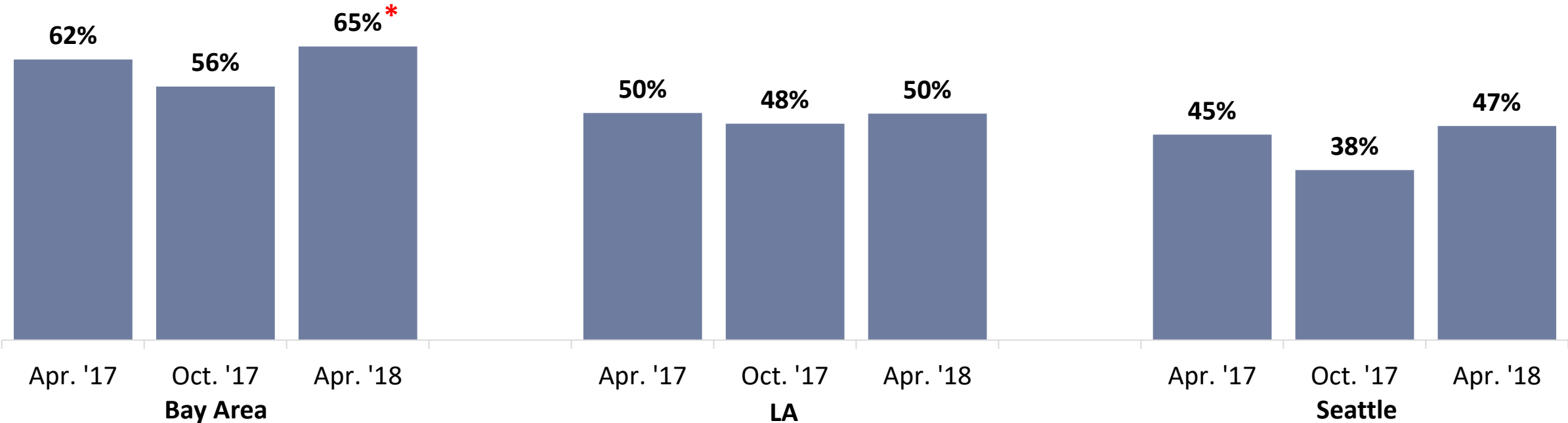
Note: Statistically significant changes over time marked with a red asterisk (*)

Seen or Heard about Reno Tahoe

Awareness of Reno Tahoe continues to be highest in the Bay Area.

% Who have seen or heard anything lately about Reno Tahoe

■ Overall Population



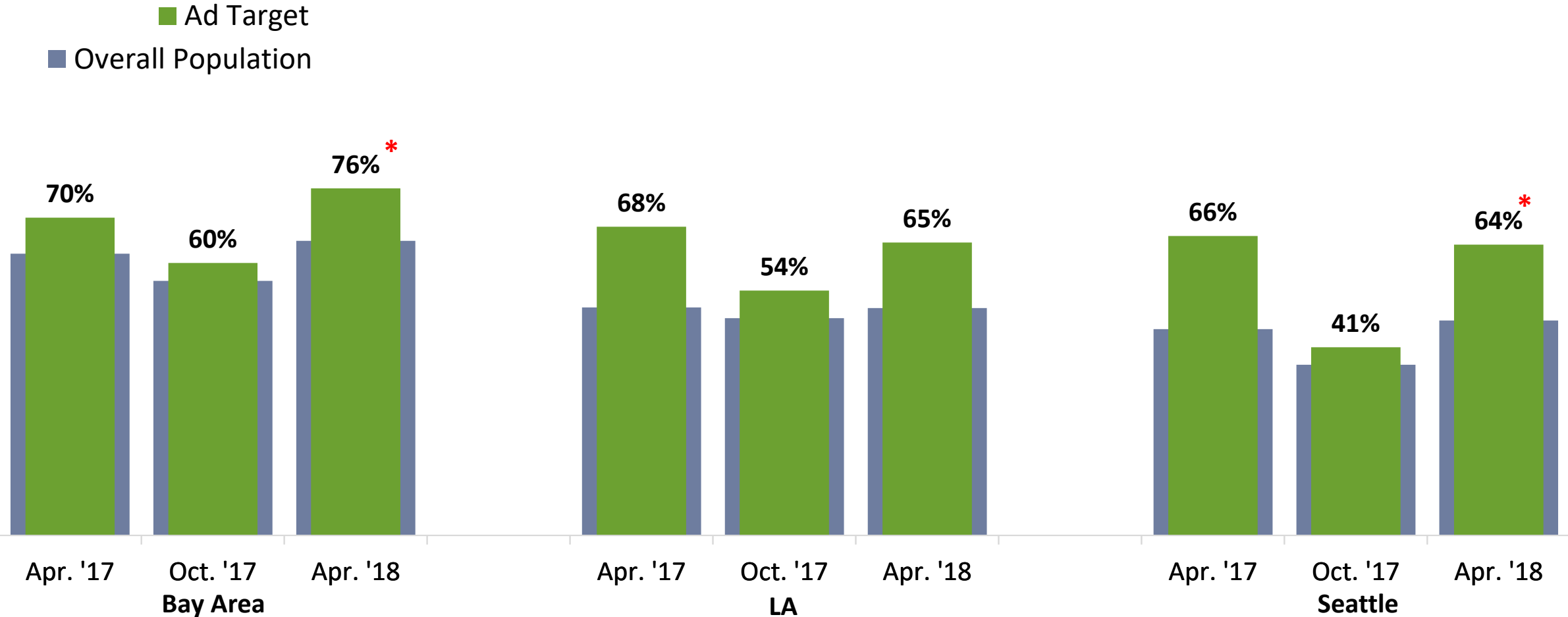
Q15. Have you seen or heard anything about Reno Tahoe lately?

Seen or Heard about Reno Tahoe – Ad Target



Those in the advertising target populations are more likely to have heard something about Reno Tahoe recently.

% Who have seen or heard anything lately about Reno Tahoe



Q15. Have you seen or heard anything about Reno Tahoe lately?

Campaign Elements Shown in Survey

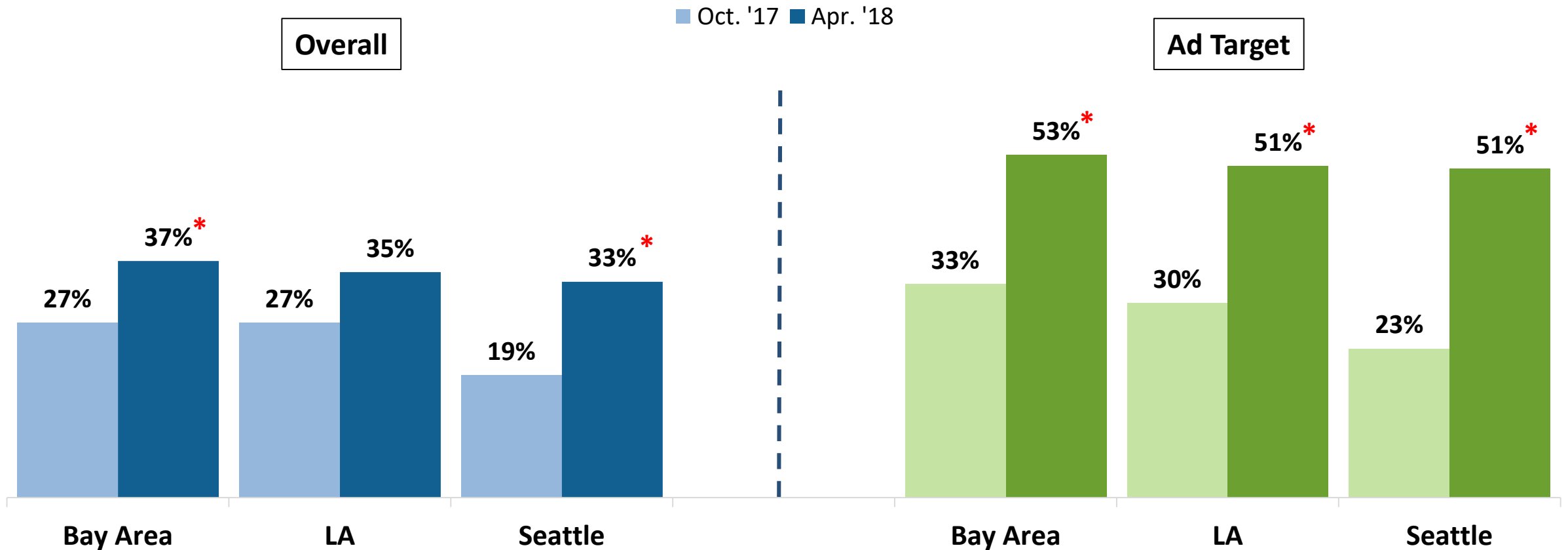
To measure aided awareness of the new ad campaign, respondents were presented with the ad images, a video ad, and a radio ad.



Aided Ad Recall

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)



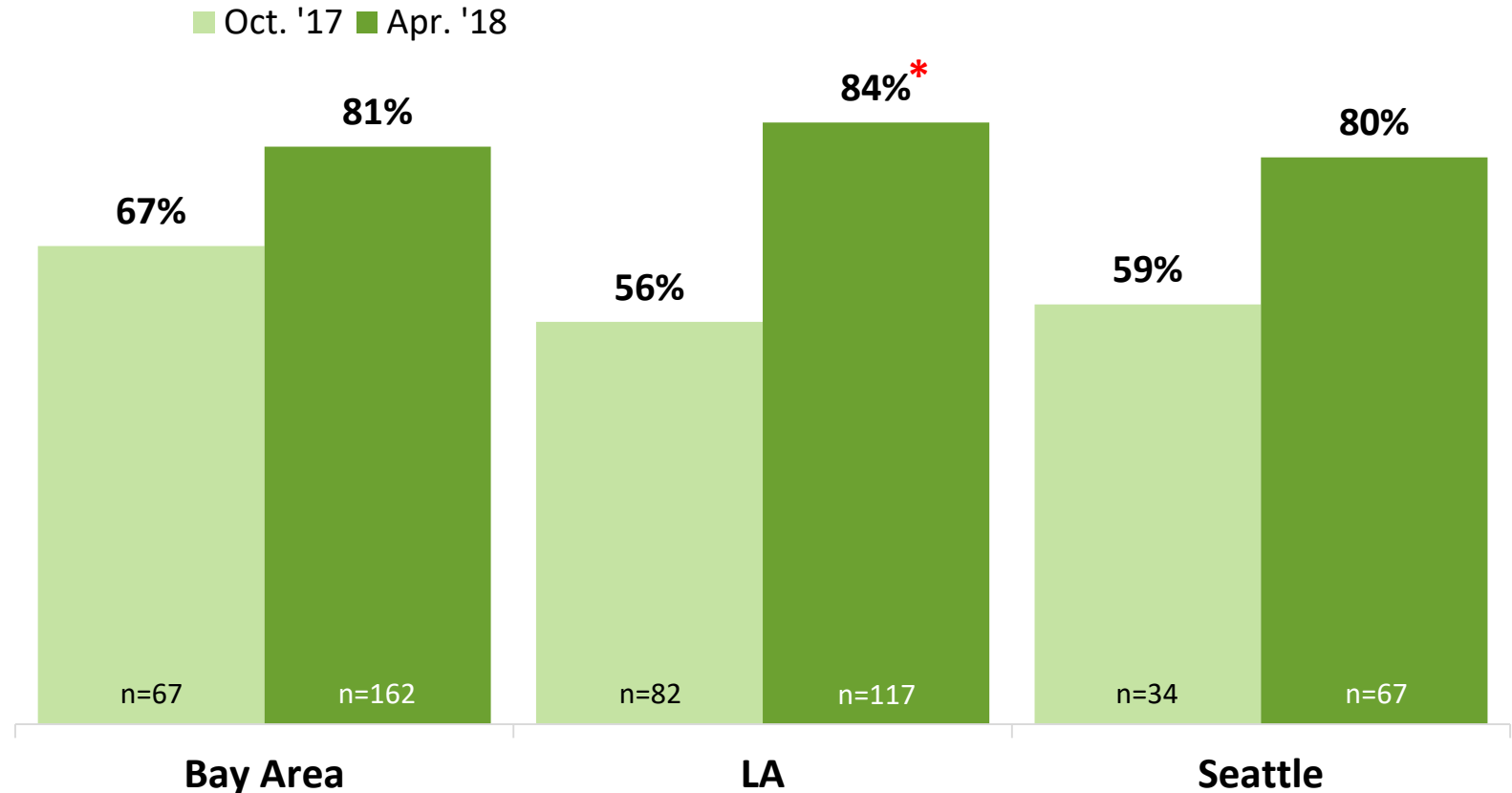
Actions Taken After Seeing Ads

Most who recall seeing ads report taking at least one action, with a significant increase in LA over the October 2017 survey.

% Who Took An Action as a Result of Advertising

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

- Reported doing one or more of the following:
- Visited VisitRenoTahoe.com
 - Ordered a Visitor Planner
 - Signed up for e-newsletter
 - “Liked” on Facebook
 - Followed on Twitter
 - Followed on Instagram
 - Sought out more information about Reno Tahoe



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.

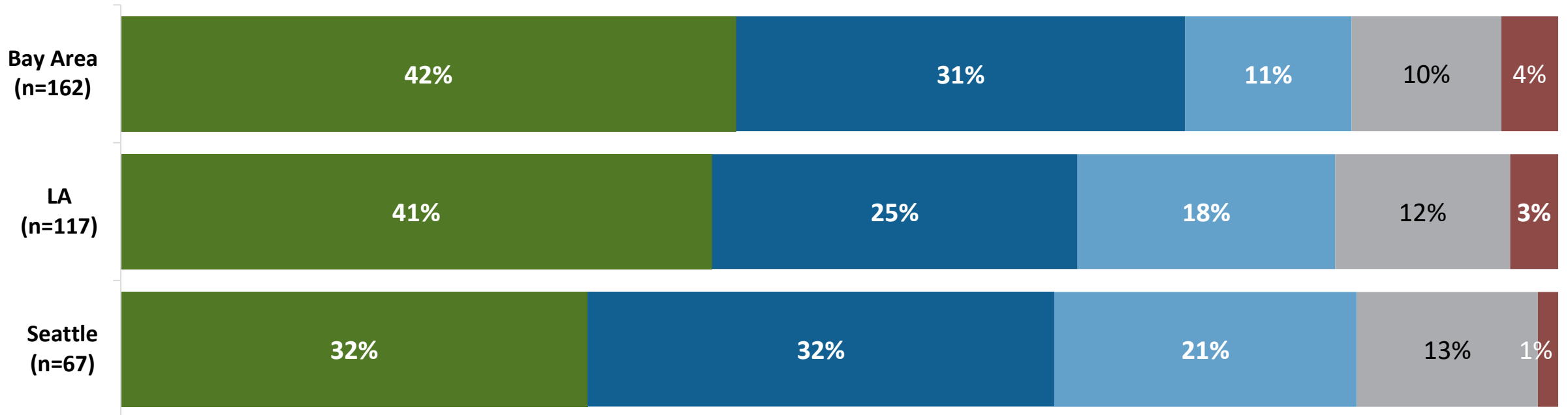
Advertising Impact on Travel Plans

Advertisements are driving changes in travel plans in the Ad Target population.

How Advertising Impacted Travel Plans in the Ad Target

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

- Convinced me to consider a trip
- Confirmed decision already made to visit
- Caused me to lengthen stay/visit additional areas
- No impact
- Helped decide not to visit

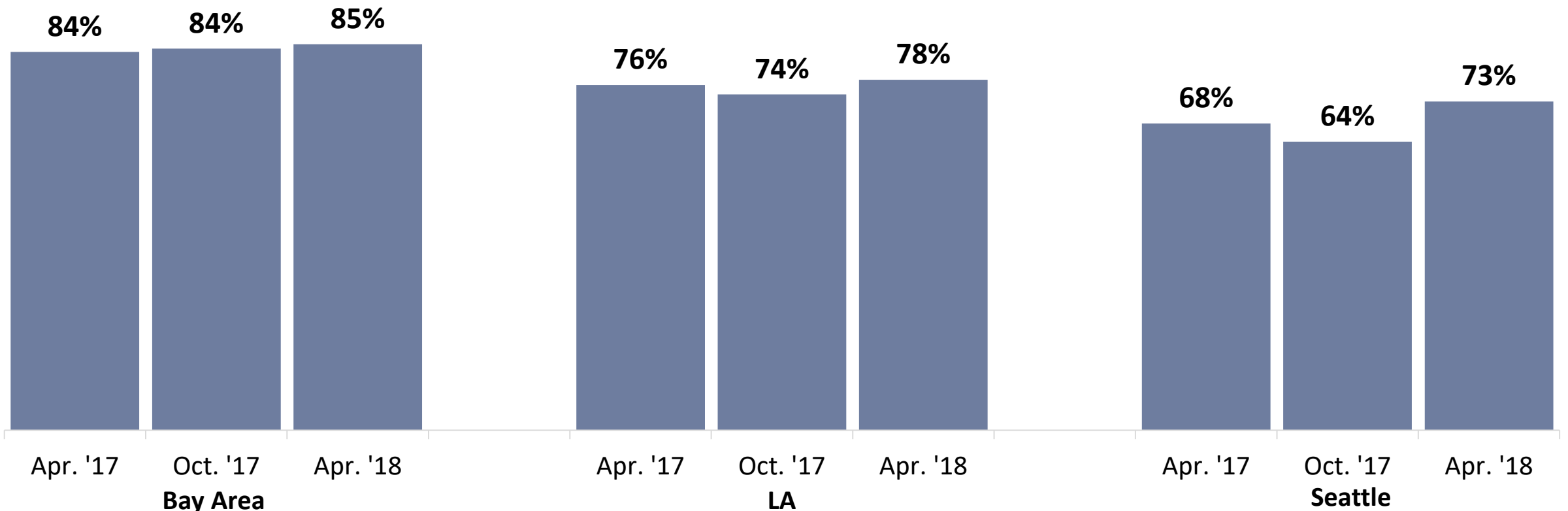


Favorable Opinion of Reno Tahoe

Reno Tahoe continues to have a strong destination brand rating in all markets.

% who report a favorable opinion of Reno Tahoe as a travel destination

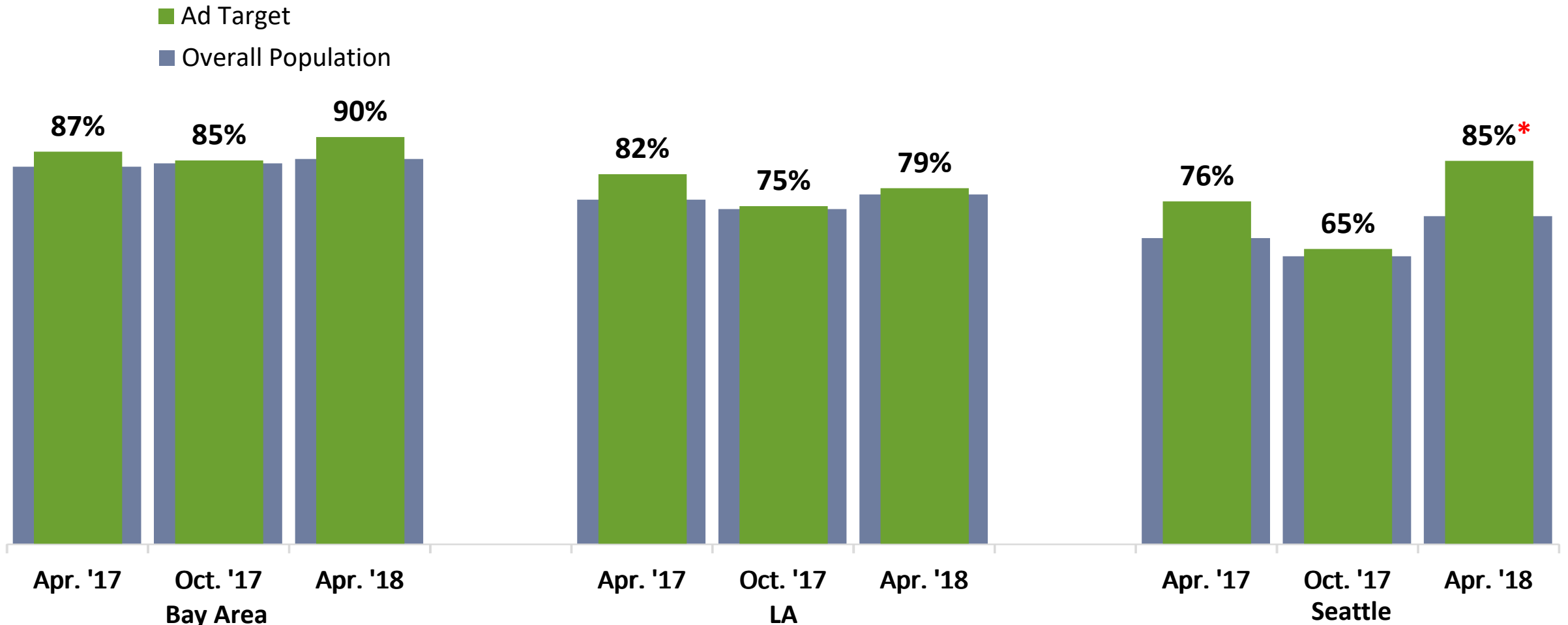
■ Overall Population



Favorable Opinion of Reno Tahoe – Ad Target

The Reno Tahoe brand rating has strengthened in the Seattle market advertising target.

% who report a favorable opinion of Reno Tahoe as a travel destination



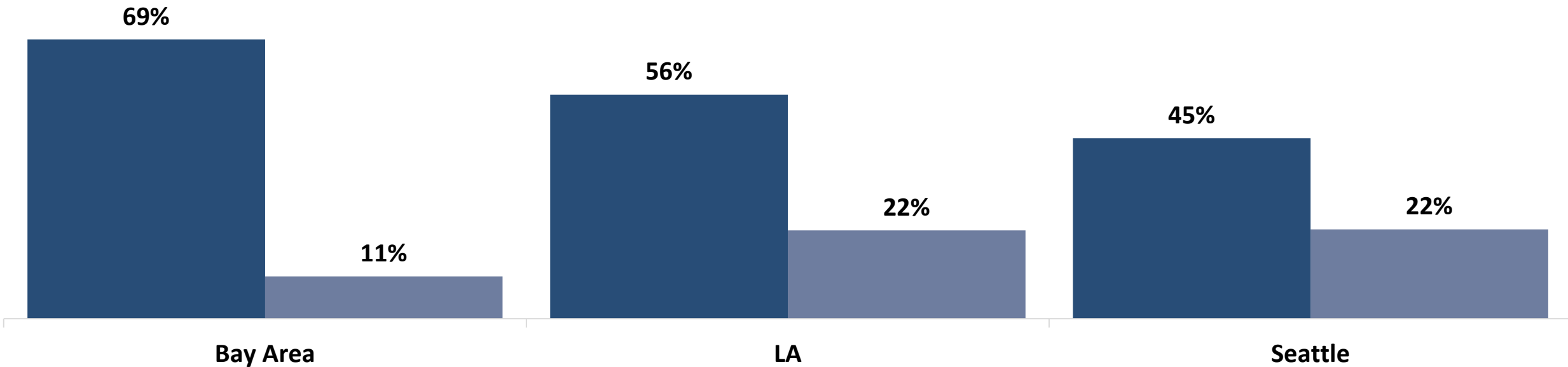
Q14. Please rate your opinion of Reno Tahoe as a travel destination.

Potential Visitors

Bay Area residents are more likely to be short-term rather than longer-term potential visitors, compared to LA and Seattle residents.

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

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

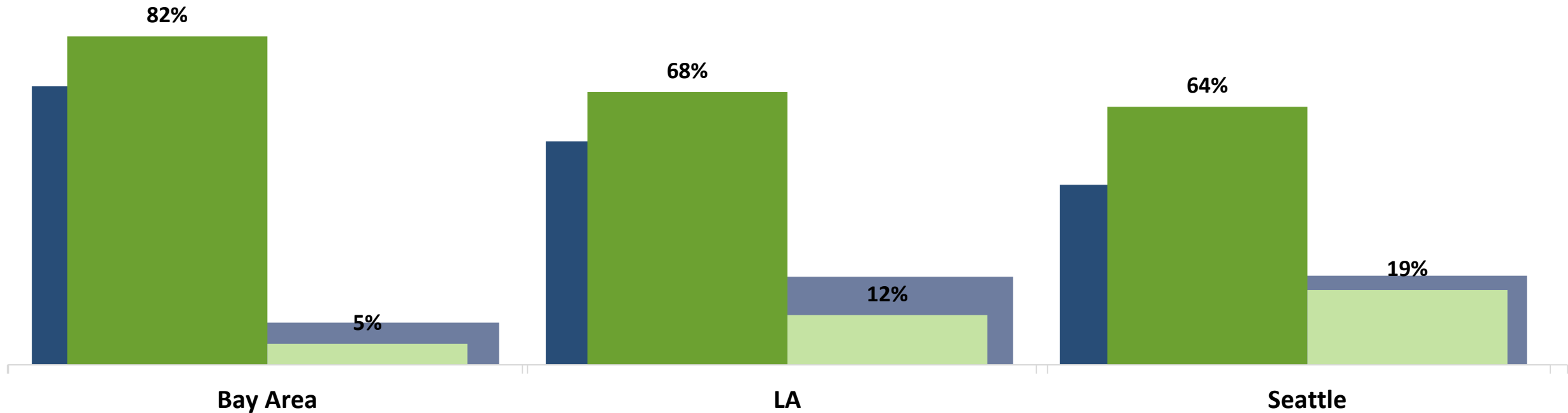


Potential Visitors – Ad Target

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

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

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



Conclusions

- ▶ Key brand and ad metrics have improved across all markets, particularly among target populations.
- ▶ Ad penetration is high with target populations, demonstrating targeting effectiveness.
- ▶ Those who have been exposed to the ads respond favorably to them, with four in five in each market reporting taking an action in response.



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