



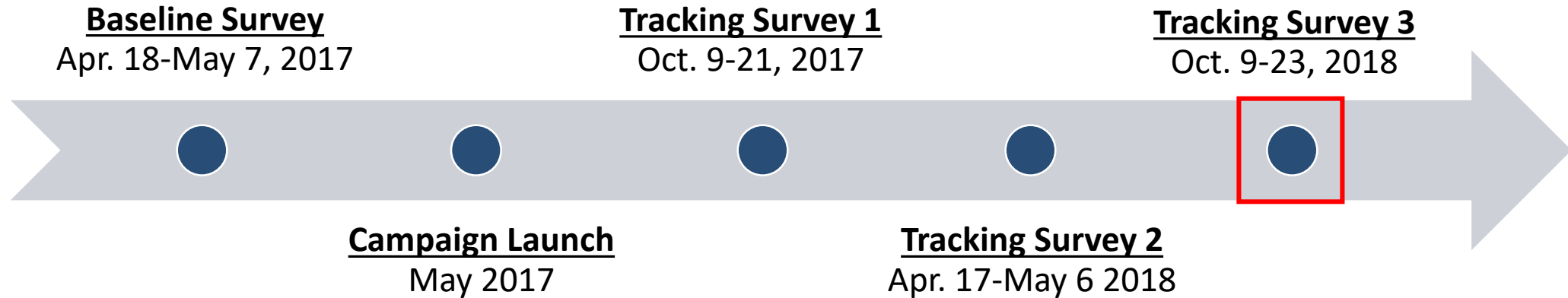
Reno Tahoe Brand Tracking Surveys
San Francisco Bay Area, Los Angeles, & Seattle Markets

Executive Summary Presentation
Board of Directors – January 24, 2019

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 3	Overall Responses	Overall Margin of Error	Responses within Ad Target	Margin of Error within Ad Target
Bay Area Market	1026	± 3.5%	313	± 5.5%
Los Angeles Market	868	± 4.0%	277	± 5.9%
Seattle Market	498	± 4.9%	111	± 9.3%

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

Key Findings

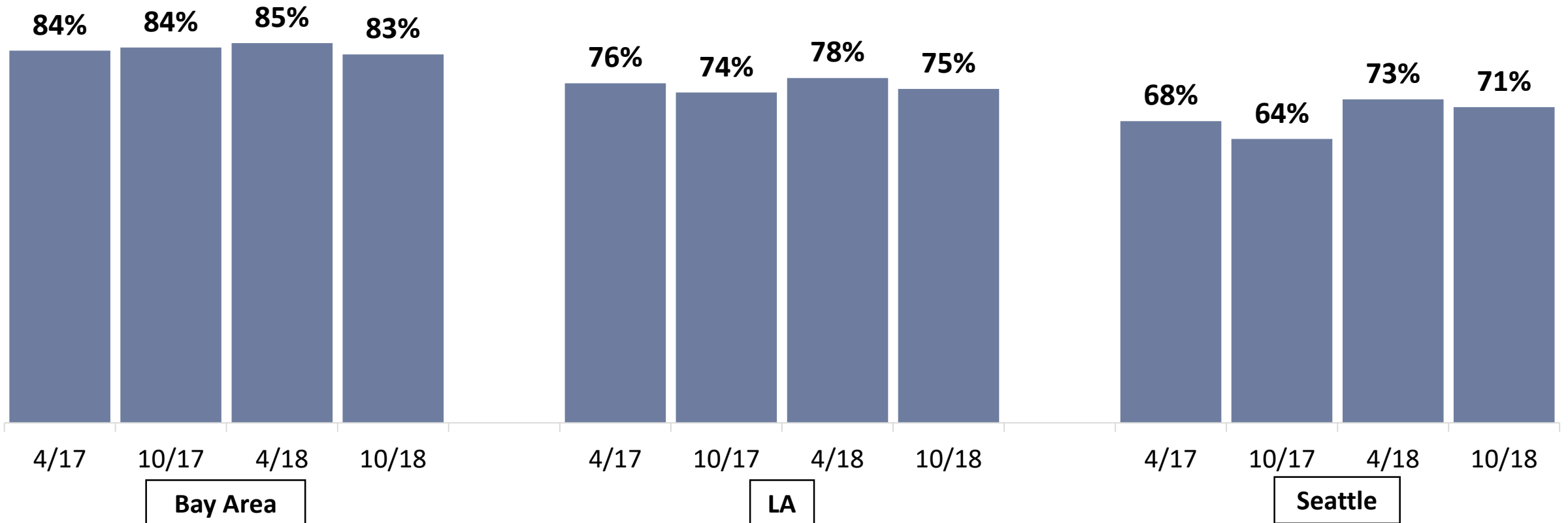
- ▶ The Reno Tahoe destination brand rating, desire and intent to visit, and attribute associations remain strong in all three markets.
- ▶ In the Bay Area market, a seasonal pattern in Reno Tahoe awareness is beginning to emerge, where awareness is somewhat higher in the spring than in the fall.
 - Seasonality in Reno brand metrics was also evident in past research conducted for RSCVA in the Bay Area.
- ▶ Outdoors, beauty, and fun continue to be the strongest aspects of the Reno Tahoe brand.
- ▶ Measures of campaign effectiveness continue to be strong, even with some changes to the ad content shown in this survey wave.

Reno Tahoe Brand Rating

Reno Tahoe has a consistently strong destination brand rating in all markets surveyed.

% Who Report a Favorable Opinion of Reno Tahoe as a Travel Destination

■ Overall Population

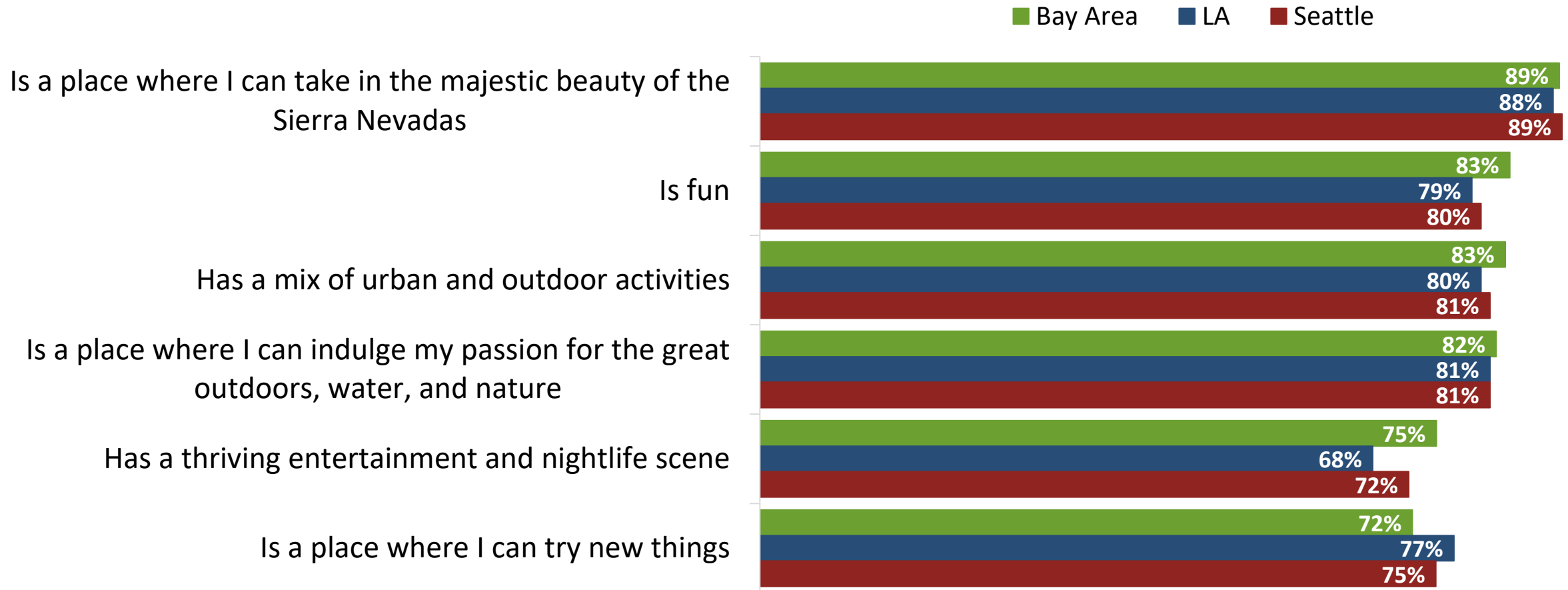


Q14. Please rate your opinion of Reno Tahoe as a travel destination.

Top Brand Attributes

Across all markets, Reno Tahoe is viewed as a fun destination for both outdoor activities and an urban experience.

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

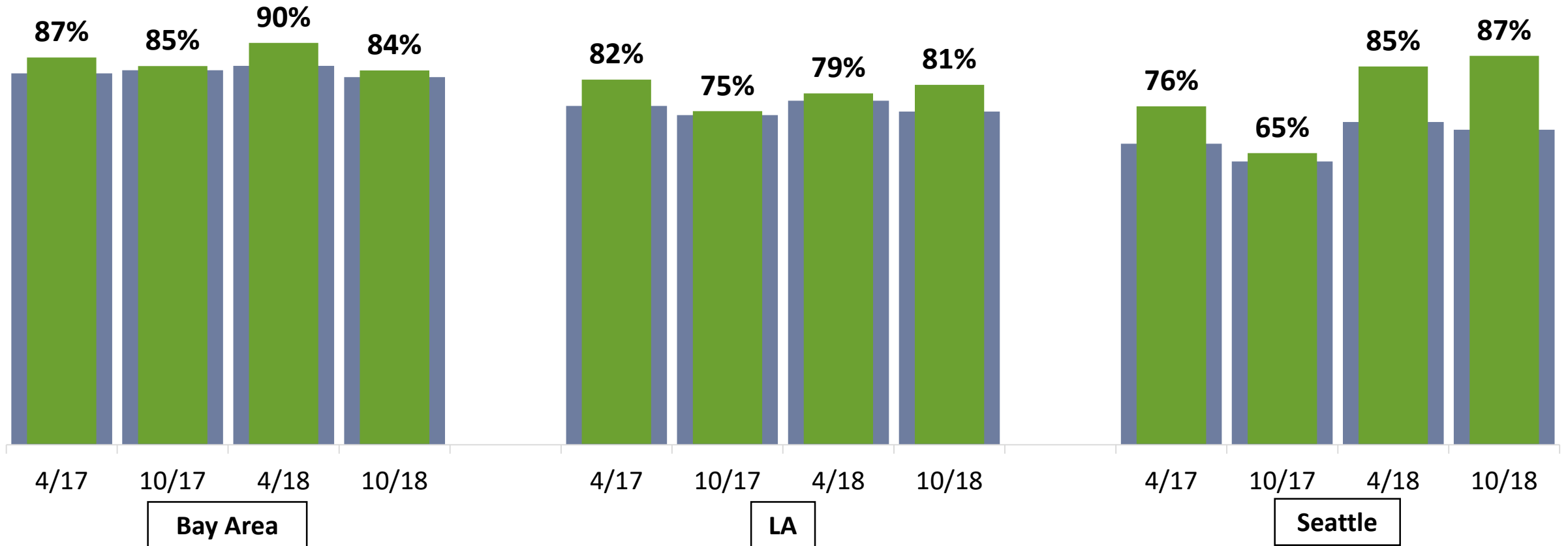


Brand Rating – Ad Target

The brand rating is stronger with the target in each market, particularly in Seattle.

% Who Report a Favorable Opinion of Reno Tahoe as a Travel Destination

■ Ad Target
■ Overall Population

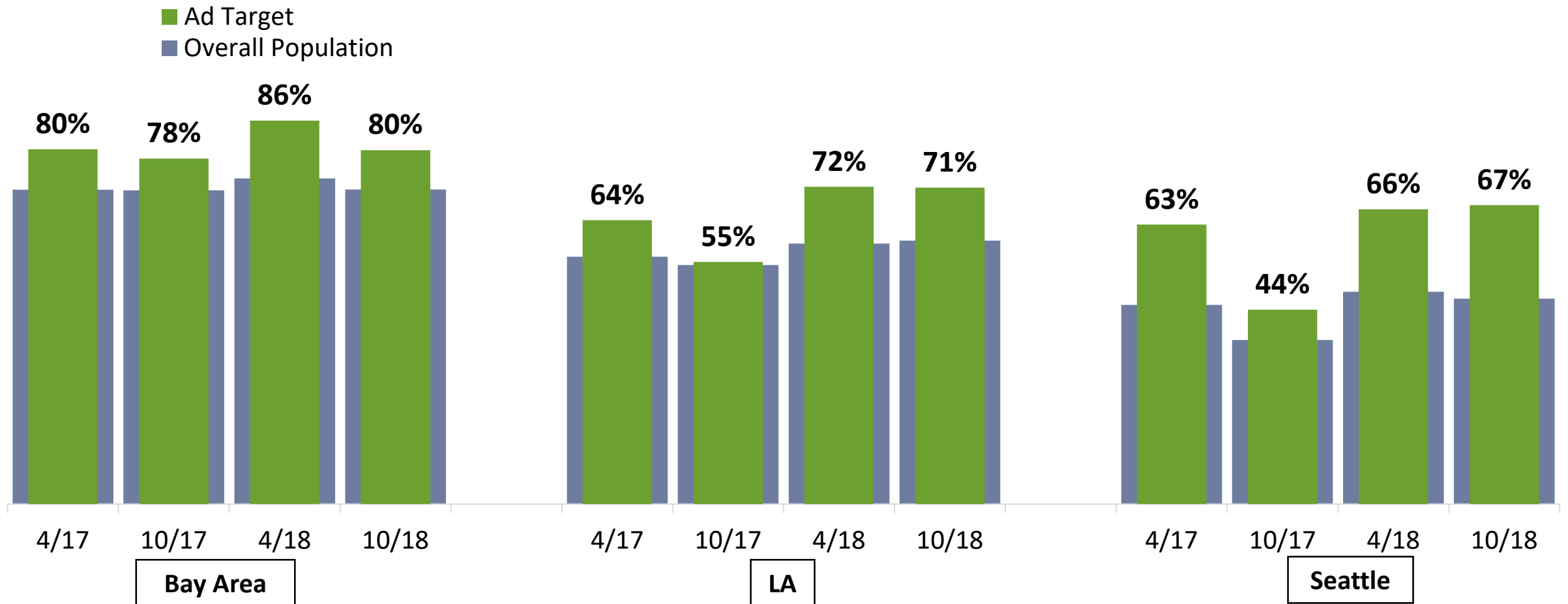


Q14. Please rate your opinion of Reno Tahoe as a travel destination.

Intent to Visit – Ad Target

Last April's gains in stated intent to visit Reno Tahoe have been maintained in the Seattle and target populations.

% Likely to Visit in the Next Two Years



Past Visitation & Intent to Visit

Over half of the target in LA and Seattle are potential new visitors, while the Bay Area's target is split between repeat and new visitors.

Among Ad Target

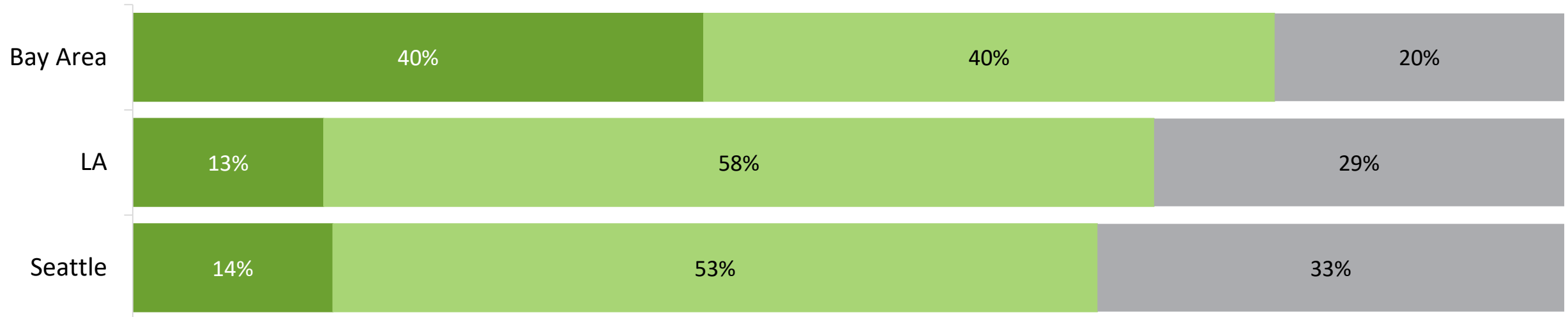
Likely Repeat Visitors
Past visitor, Stated intent to visit

Potential New Visitors
Not Past visitor, Stated intent to visit

■ Likely Repeat Visitors

■ Potential New Visitors

■ Else



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.

A different set of ads was used in earlier surveys.



Main Theme of the Ads – Combined Responses

With the new visual and video ads, mentions of “fun” dominate responses; “outdoor” and “active” were less frequently cited than in previous studies with earlier creative.

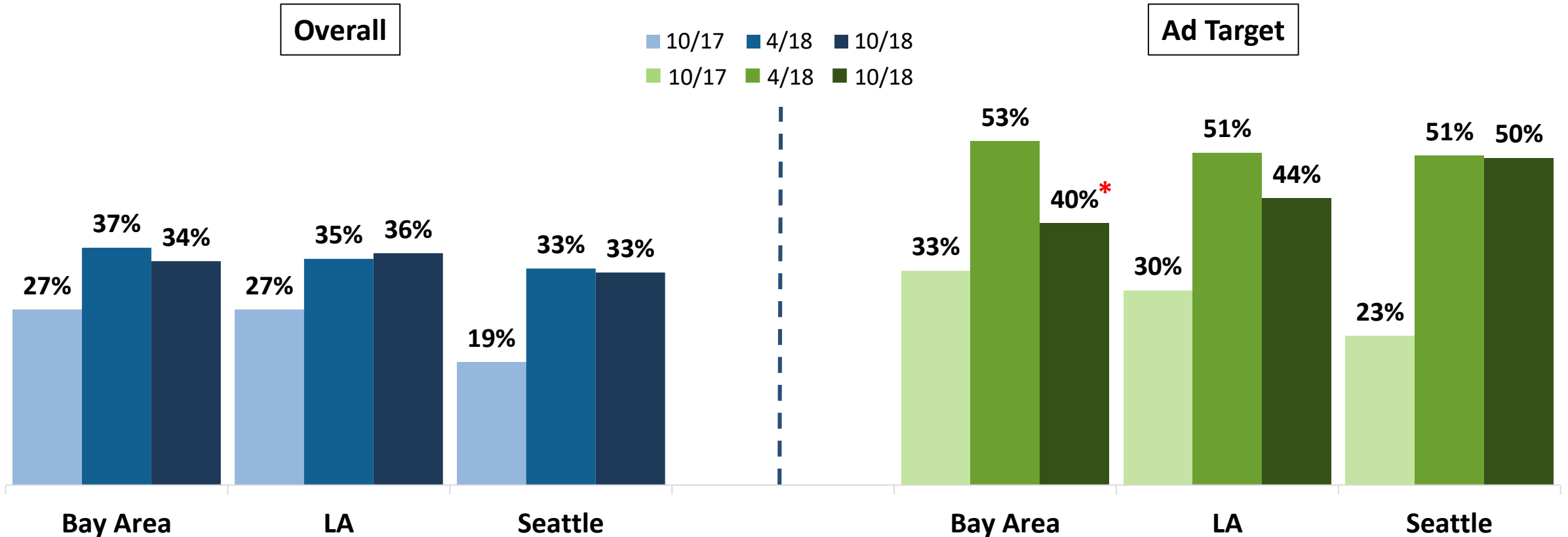


Word Cloud only displays data for October 2018.

Aided Ad Recall: Summary

Aided ad recall is consistently higher with the target across all markets, but is lower in the Bay Area than what was measured in April with earlier creative..

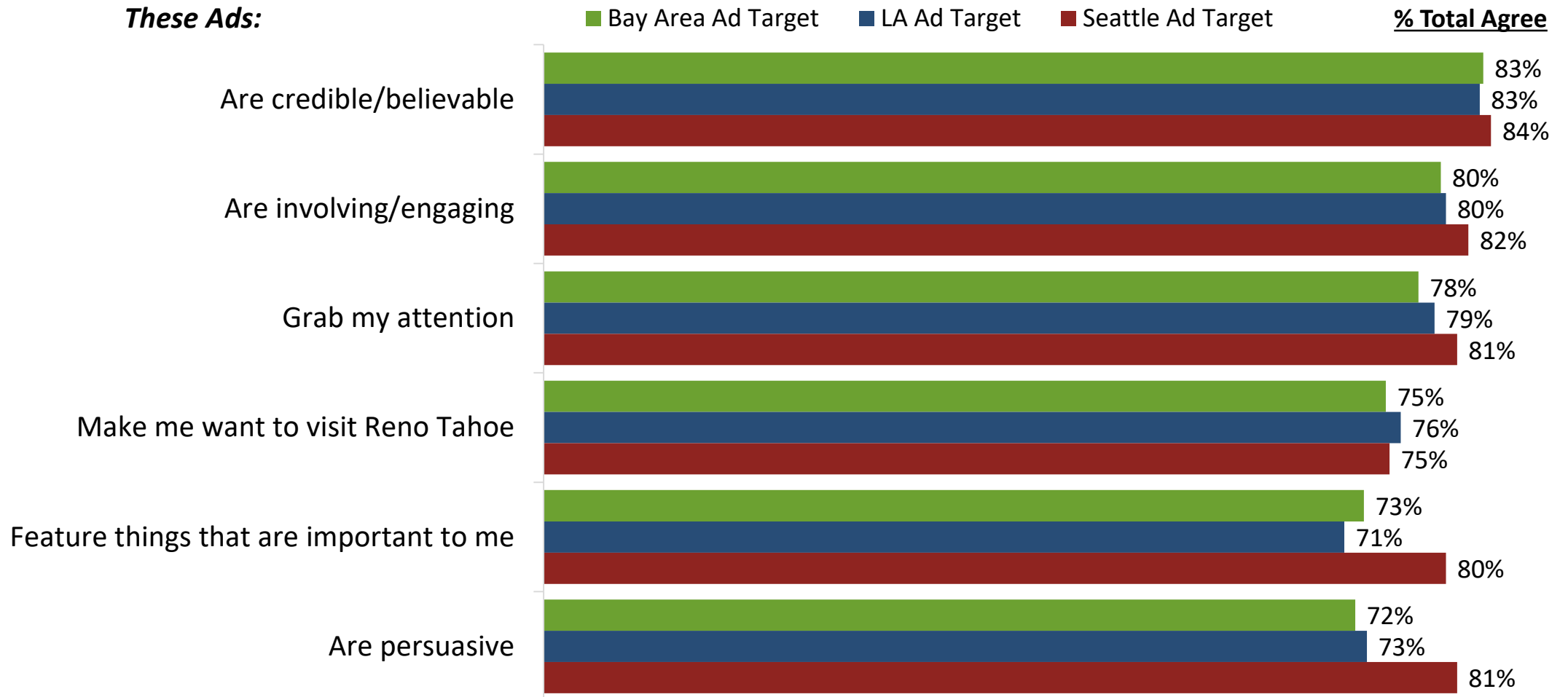
% Who Recall At Least One Ad (Print, Digital Video, or Radio)



*Different print and digital video ads were tested in the October 2017 and April 2018 surveys.
18-6911; 18-6912; 18-6913 RSCVA Brand Tracking Surveys – Fall 2018 | 11*

Top Ad Diagnostics – Ad Target

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



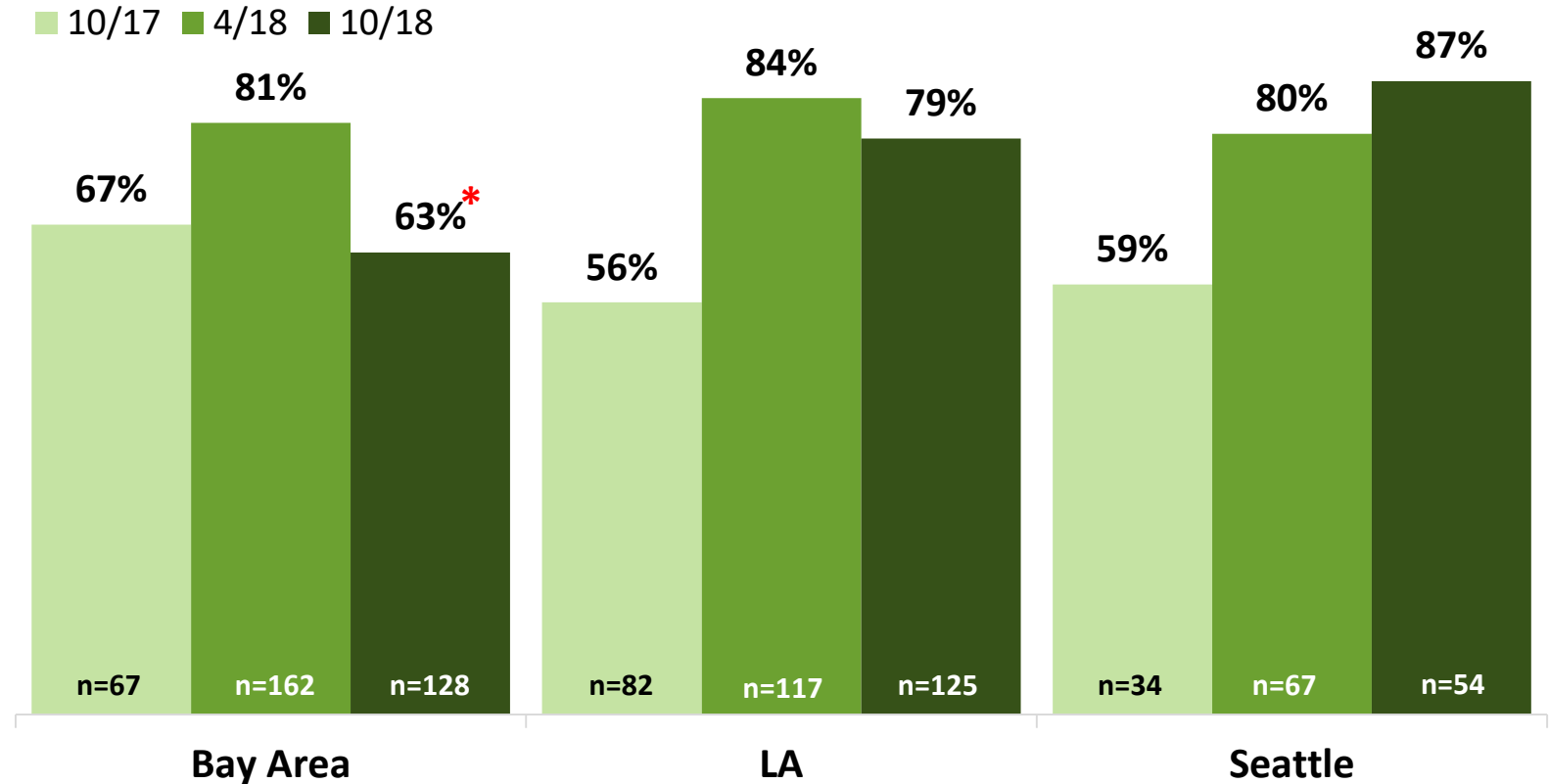
Q54-64. For each of the following statements, please indicate how much you agree or disagree that it describes the ads you just saw and heard.

Actions Taken After Seeing Ads

Among those in the Ad Target, respondents in LA and Seattle are more likely to report taking an action as a result of advertising than those in the Bay Area.

% Who Took an Action as a Result of Advertising (Among Ad Targets Who Recall 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.

October 2018 Brand Research Conclusions

- ▶ Sustained brand presence has led to gains in Reno Tahoe brand metrics that have been maintained, especially in markets where Reno Tahoe is less well-known.
- ▶ A seasonal pattern in awareness and other key brand metrics is emerging, particularly in the Bay Area, where a similar seasonal pattern was observed in prior brand research.
- ▶ The ads continue to connect with their intended target.



Sara LaBatt

sara@emcresearch.com

510.550.8924

Eric Cameron

eric@emcresearch.com

510.550.8934

Ben Richter

ben@emcresearch.com

202.686.5903