

March 2019

RENO-SPARKS CONVENTION & VISITORS AUTHORITY (RSCVA)

Las Vegas Market Potential Study

Final Report



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STUDY OVERVIEW

Background

- + In developing a new geographic targeting model, the RSCVA in conjunction with BVK, identified Las Vegas as a possible target market. However, the RSCVA has a hypothesis that residents of Las Vegas primarily visit Reno Tahoe for business and/or to visit their children enrolled in UNR.
- + As such, in order to determine the viability of Las Vegas as a leisure target market, the RSCVA wishes to explore the question: Why do travelers from Las Vegas visit the Reno Tahoe area? And how many leisure visitors are likely to come from the Las Vegas DMA?
- + Prior to undertaking primary research to answer this question, **bvk** completed a brief run in MRI among residents of the Las Vegas DMA, cross-tabulated with their reasons for visitation. That data run revealed very little evidence of business travel. However, the base size is small, and Reno Tahoe visitation is only related to gambling within the MRI framework.
- + Therefore, a quantitative online survey of residents within the Las Vegas DMA was recommended.

Research Objectives

To determine whether Las Vegas is a viable target market for Reno Tahoe, by way of:

- + Measuring strategic intention metrics (favorability, likelihood to visit, likelihood to recommend, website visitation)
- + Profiling residents of Las Vegas who recently traveled to the Reno Tahoe area on:
 - Purpose of their visit (leisure, business, “bleisure”, visiting family/friends, visiting UNR-enrolled children, etc.)
 - Attractions/sites visited
 - Length of stay
 - Type of accommodations utilized
 - Travel group (self, couple, family with kids, etc.)
 - Demographics
 - Psychographics
- + Utilizing the above data to generate a volumetric estimation of likely leisure visitors to Reno Tahoe from the Las Vegas DMA, including those within Reno Tahoe’s media target audience

Sampling & Methodology

- + This study was conducted online—a total of 808 individuals completed the survey.
- + Sample was sourced via Dynata, the leading online consumer panel in the U.S., as well as through a Facebook ad promoted via the RSCVA’s account, and an email invitation sent to the RSCVA’s newsletter/inquirer database.
- + Respondents were screened to:
 - Be aged 21 or older
 - Reside in the Las Vegas DMA
 - Be a household travel decision-maker
 - Have taken a vacation or leisure trip in the last 12 months
- + Respondents were further screened to fit into the following key segments:
 - Ambition Media Target:
 - Ages 25-49
 - Household Income of \$75,000+
 - Agree with a minimum of one of four ambition value statements (aligned to MRI)
 - General Traveler Population:
 - All other qualified respondents
- + Data were collected between February 18th, 2019 through March 4th, 2019.
- + Best efforts were made to achieve a demographically representative sample.
- + General Traveler Population data were weighted by age and household income to match population demographics of residents in the Las Vegas DMA.

Respondent Profile: Segments and Visitation

| | Respondents n = 808 | |
|-----------------------------|------------------------|---------|
| Ambition Media Target | 16.5% | n = 133 |
| Recent Visitors | 53.4% | n = 71 |
| Lapsed Visitors | 19.5% | n = 26* |
| Prospects | 27.1% | n = 36 |
| General Traveler Population | 83.5% | n = 675 |
| Recent Visitors | 41.1% | n = 332 |
| Lapsed Visitors | 29.7% | n = 240 |
| Prospects | 29.2% | n = 236 |

**Caution: sample sizes under n = 30 are not statistically reliable.*

- + A total of 808 individuals completed the survey. Unweighted sample composition and sample sizes by segment, visitor status, and visitor status within the Ambition Media target are shown in the table above.
- + Ambition Media target incidence in this study is corroborated by the incidence of this segment in MRI (15.7%).



EXECUTIVE SUMMARY & CONCLUSIONS



Las Vegas Is a Viable Media Market

Past Visitation to Reno Tahoe Is Strong

- + The majority of Las Vegas travelers have visited Reno Tahoe, with nearly seven in ten Las Vegas travelers (68%) having ever visited Reno Tahoe. Of those who have ever visited, about six in 10 are recent visitors.
 - Within the Ambition Media Target, nearly three-fourths have ever visited—and, three-fourths of those who have ever visited are recent visitors.

Leisure Reasons Drive Majority of Visitation, Not Business or Visiting Children at College

- + When asked for the main reason they went on their most recent trip to Reno Tahoe, over half of visitors from Las Vegas (52%) cite a purpose related to going on a vacation or getaway trip.
 - Regardless of segment, visitor status (recent or lapsed), or respondent source, 40-57% of each group offer a reason related to going on a vacation or getaway trip as the main reason for visiting Reno Tahoe.
 - Notably, only 13% of visitors say they were traveling for businesses, and only 3% say they were visiting their children who are enrolled in college in the area.
 - Visiting friends or relatives is the main reason for about two in ten visitors.



Las Vegas Is a Viable Media Market (cont.)

Past Visitors to Reno Tahoe Stay in Paid Accommodations & Stay an Average of 3.2 Nights

- + Nine in ten visitors stayed overnight on their most recent trip to Reno Tahoe, staying an average of 3.2 nights.
- + The majority of visitors (65%) stayed in paid accommodations—a hotel, motel, casino hotel, or inn.
- + Visitors from Las Vegas are most likely to travel to Reno Tahoe by car (69%); just over one-fourth (26%) travel to Reno Tahoe by air.
- + While in Reno Tahoe, visitors from Las Vegas are more likely to participate in outdoor activities (46%), gamble (39%), and shop (38%) than they are to participate in any other activities.



Las Vegas Is a Viable Media Market (cont.)

Favorability of Reno Tahoe Is High

- + Las Vegas travelers have a highly favorable opinion of Reno Tahoe, with more than eight in ten (83%) having a very or somewhat favorable opinion.
 - Both the Ambition Media Target and the General Traveler Population have favorable opinions of Reno Tahoe, with between eight and nine in ten travelers rating it as very or somewhat favorable in both segments.
 - Reno Tahoe visitors are significantly more likely to rate their opinion as favorable as compared to prospects, with 95% of recent visitors and 84% of lapsed visitors rating it as very or somewhat favorable. That said, 64% of prospects rate the destination as favorable, even though they have never been there.
 - Prospects who are likely to visit Reno Tahoe have a more favorable opinion of Reno Tahoe as compared to prospects who are neutral or unlikely to visit: 83% of prospects who are likely to visit have a favorable opinion.

Likelihood to Visit Reno Tahoe in the Next Two Years Is Strong

- + Two-thirds of Las Vegas travelers say they are very or somewhat likely to visit Reno Tahoe in the next two years.
 - Travelers within the Ambition Media Target are significantly more likely to visit Reno Tahoe in the next two years, with 78% of the Ambition Media Target saying they are likely as compared to 64% of the General Traveler Population.
 - Recent visitors are the group most likely to visit the Reno Tahoe area in the next two years, with 84% of recent visitors, 49% of lapsed visitors, and 57% of prospects saying they are likely to visit.



Las Vegas Is a Viable Media Market (cont.)

Trip Satisfaction Is High

- + More than eight in ten visitors (81%) rate their experience in Reno Tahoe as a 5 or 4 (with 5 being “excellent”). Notably, only 4% rate their experience a 2 or 1.
 - Regardless of segment, visitor status, or respondent source, between 75% and 97% of visitors rate their experience as a 5 or 4.
- + When asked why they rated their experience in Reno Tahoe as a 5 or 4, visitors most often say it is because of the beauty or nature (31%), they enjoyed their trip or had a lot of fun there (23%), they think Reno Tahoe is a great area or they love Reno Tahoe (11%), there is a variety of activities to do there (9%), they spent time with family and friends (8%), there were outdoor activities (8%), or they enjoyed the weather (8%).

Advocacy Is Strong

- + Nearly two-thirds of Las Vegas travelers (63%) are likely to recommend Reno Tahoe to other people, rating their likelihood as a 7, 8, 9 or 10.
 - Those within the Ambition Media Target are significantly more likely to recommend Reno Tahoe, with 71% rating their likelihood to recommend a 7, 8, 9, or 10, as compared to 61% in the General Traveler Population.
 - Additionally, recent visitors are significantly more likely to recommend Reno Tahoe as compared to lapsed visitors or prospects, with 82% of visitors, 65% of lapsed visitors, and 37% of prospects saying they are likely to recommend it.



Las Vegas Is a Viable Media Market (cont.)

Visitation to Reno Sparks Leads the Sub-Regions

- + While the South Lake Tahoe area is the sub-region Las Vegas travelers are most likely to have a favorable opinion of, Reno/Sparks is actually the area most likely to be visited, and is visited by nearly six in ten visitors (58%).
 - + Almost half of visitors (49%) have visited the South Lake Tahoe area, nearly three in ten (29%) visited the Incline Village area, and one-fourth visited the Truckee and North Lake Tahoe area.
 - Reno/Sparks is the most visited sub-region, regardless of visitor status, segment, or respondent source.



Las Vegas Is a Viable Media Market (cont.)

- + In the table below are volumetric visitation estimates based on metrics of past visitation and likelihood to visit in this study. Due to the variety of factors that influence visitation, survey data cannot accurately predict visitation volume. These numbers are being presented purely for the sake of discussion.
- + Self-reported likelihood does not reliably predict visitation, as respondents tend to over-report how likely they are to visit a destination. Using industry best practices, likelihood to visit top 2 box scores have been adjusted to arrive at more realistic visitation estimates.

| | | Study % | Adjustment | Adjusted % | Projected Las Vegas Market Traveling Population 18+ |
|---------------------------|---|---|---|---------------|---|
| Overall | Total Traveling Population | | | - | 1,003,968 |
| | Have Ever Visited | 67.8% | | - | 680,754 |
| | Recent Visitor | 41.3% | | - | 414,639 |
| | Lapsed Visitor | 26.5% | | - | 266,052 |
| | Prospect | 32.2% | | - | 323,278 |
| | Likelihood to Visit (<i>adjusted % X projected households/population</i>) | | | | |
| | Recent Visitors Likely to Visit | 84.3% | 10% taken off the top box, 33% taken off the second box | 69.4% | 287,888 |
| | Lapsed Visitors Likely to Visit | 49.2% | 25% taken off the top box, 50% taken off the second box | 28.9% | 76,822 |
| | Prospects Likely to Visit | 56.5% | 50% taken off the top box, 66% taken off the second box | 22.0% | 70,968 |
| Ambition Media Target | Total Traveling Ambition Media Target | | | - | 165,655 |
| | Have Ever Visited | 72.9% | | - | 120,805 |
| | Recent Visitor | 53.4% | | - | 88,418 |
| | Lapsed Visitor* | 19.6% | | - | 32,387 |
| | Prospect | 27.1% | | - | 44,850 |
| | Likelihood to Visit (<i>adjusted % X projected households/population</i>) | | | | |
| | Recent Visitors Likely to Visit | 90.1% | 10% taken off the top box, 33% taken off the second box | 74.6% | 65,915 |
| | Lapsed Visitors Likely to Visit* | 57.7% | 25% taken off the top box, 50% taken off the second box | 34.6% | 11,207 |
| Prospects Likely to Visit | 69.4% | 50% taken off the top box, 66% taken off the second box | 26.9% | 12,044 | |

*Caution: Lapsed visitor calculations based on a sample size of n=26. sample sizes under n = 30 are not statistically reliable, and should be used with caution. Traveling population base sizes were sourced from MRI.



DETAILED FINDINGS

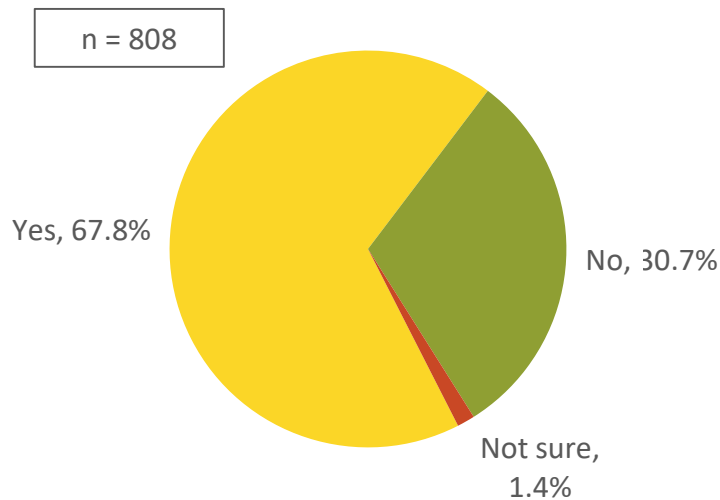


DESTINATION METRICS

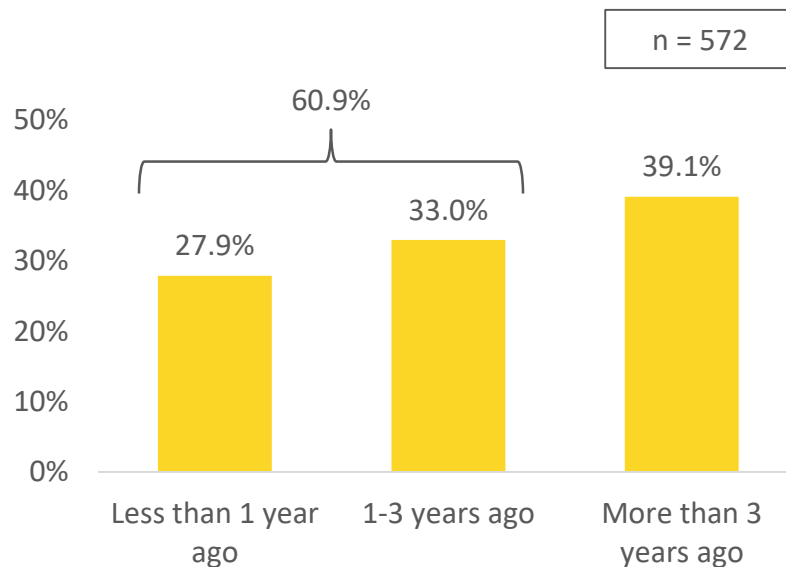


Visitation

Have Ever Visited Reno Tahoe



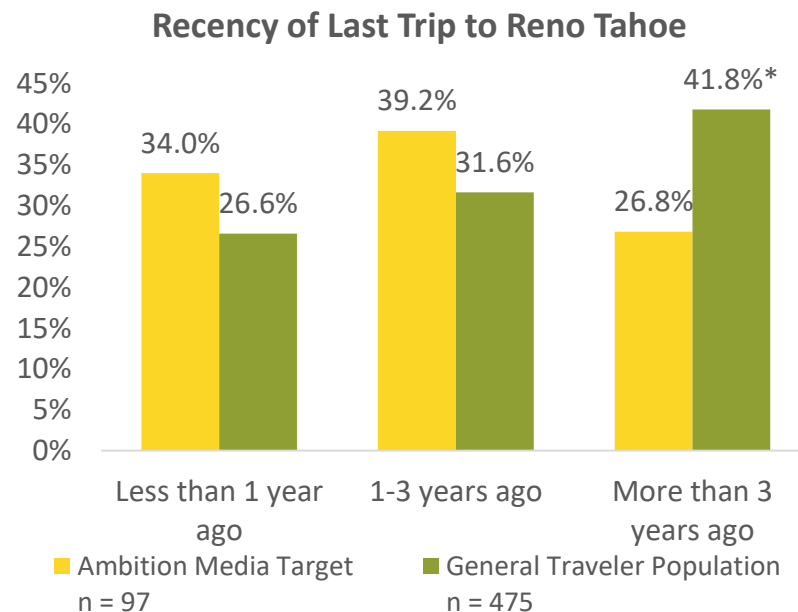
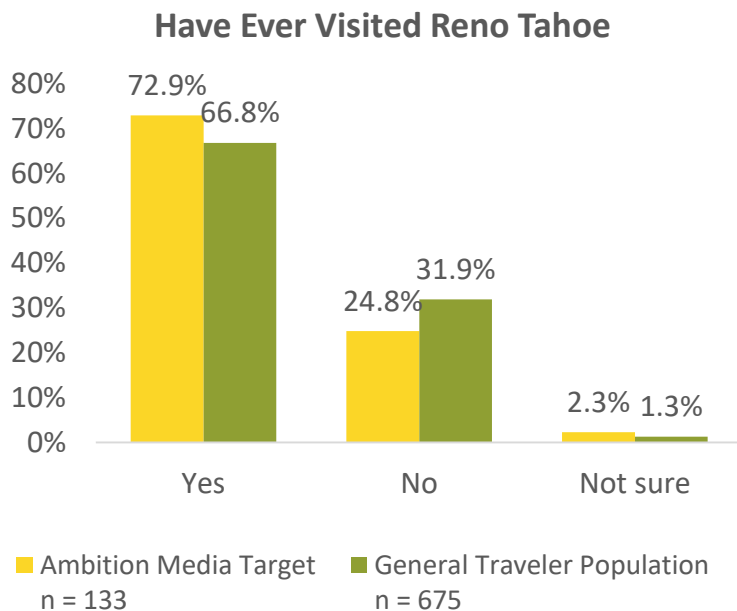
Recency of Last Trip to Reno Tahoe



Over two-thirds (68%) of Las Vegas travelers have visited Reno Tahoe. Of those who have ever visited, over six in ten (61%) are recent visitors, visiting within the last three years.



Visitation (by Segment)

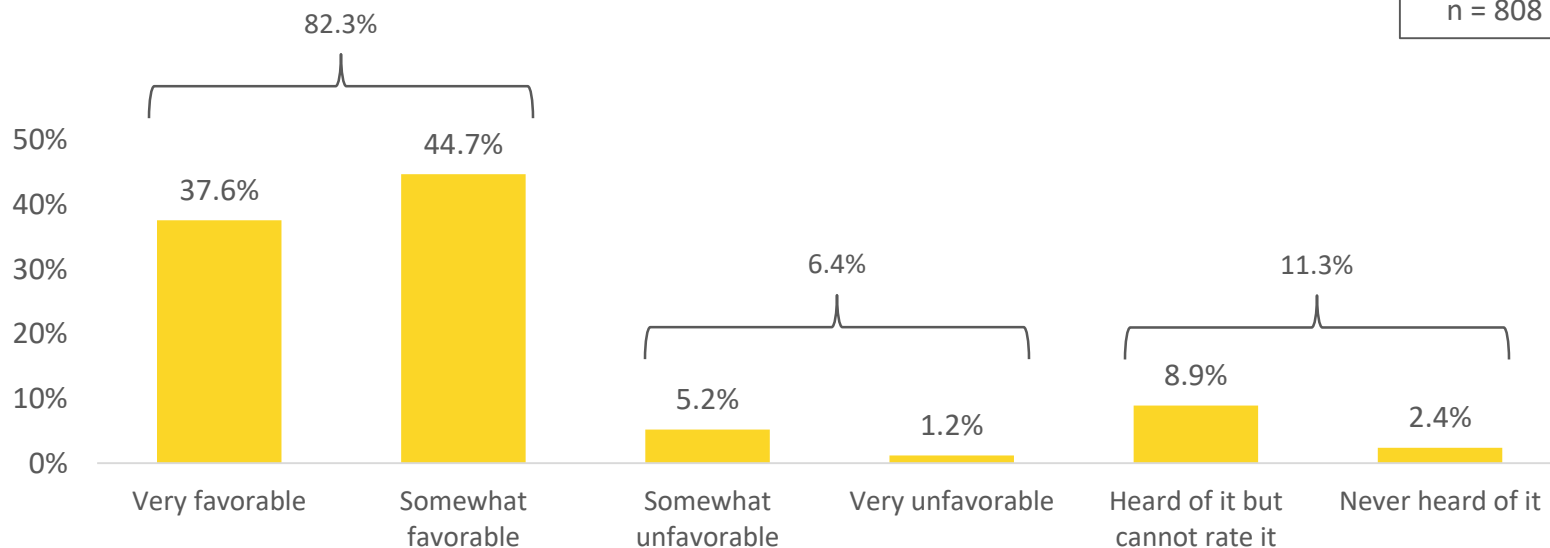


Nearly three-fourths (73%) of the Ambition Media Target and two-thirds of the General Traveler Population (67%) have ever visited Reno Tahoe. Of those who have ever visited, nearly three-fourths (73%) of the Ambition Media Target and nearly six in ten (58%) in the General Traveler Population are recent visitors.



Favorability of Reno Tahoe

n = 808



Las Vegas travelers have a very favorable opinion of Reno Tahoe as a vacation destination. Over eight in ten (82%) have a very or somewhat favorable opinion. Very few (6%) have an unfavorable opinion. Only one in ten (11%) say they have heard of it but cannot rate it, or they have never heard of it.



Favorability of Reno Tahoe (by Segment)

| | Total Las Vegas Travelers n = 808 | Ambition Media Target n = 133 A | General Traveler Population n = 675 B |
|--------------------------------|--------------------------------------|---------------------------------------|---|
| NET Favorable | 82.3% | 88.0% | 81.2% |
| Very favorable | 37.6% | 42.1% | 36.7% |
| Somewhat favorable | 44.7% | 45.9% | 44.5% |
| NET Unfavorable | 6.4% | 7.5% | 6.1% |
| Somewhat unfavorable | 5.2% | 6.8% | 4.9% |
| Very unfavorable | 1.2% | .8% | 1.3% |
| NET Can't Rate It | 11.3% | 4.5% | 12.7% A |
| Heard of it but cannot rate it | 8.9% | 3.0% | 10.1% A |
| Never heard of it | 2.4% | 1.5% | 2.6% |

Overall, travelers within the Ambition Media Target and General Traveler Population have highly favorable opinions of Reno Tahoe, with eight in ten (81%) in the General Traveler Population and nearly nine in ten (88%) in the Ambition Media Target rating it as somewhat or very favorable. Those within the General Traveler Population are more likely than those in the Ambition Media Target to say they cannot rate it, specifically that they have heard of it but cannot rate it.



Favorability of Reno Tahoe (by Visitor Status)

| | Total Las Vegas Travelers n = 808 | Recent Visitors n = 332 A | Lapsed Visitors n = 240 B | Prospects n = 236 C |
|--------------------------------|--------------------------------------|---------------------------------|---------------------------------|---------------------------|
| NET Favorable | 82.3% | 95.3% BC | 84.7% C | 63.6% |
| Very favorable | 37.6% | 55.3% BC | 31.6% C | 19.8% |
| Somewhat favorable | 44.7% | 40.0% | 53.1% A | 43.8% |
| NET Unfavorable | 6.4% | 4.1% | 10.5% A | 5.9% |
| Somewhat unfavorable | 5.2% | 3.9% | 8.1% A | 4.5% |
| Very unfavorable | 1.2% | .2% | 2.5% A | 1.4% |
| NET Can't Rate It | 11.3% | .6% | 4.8% A | 30.6% AB |
| Heard of it but cannot rate it | 8.9% | .6% | 3.5% A | 24.2% AB |
| Never heard of it | 2.4% | .0% | 1.3% | 6.4% AB |

Regardless of visitor status, Las Vegas travelers have a favorable opinion of Reno Tahoe. Over eight in ten (85%) lapsed visitors and over nine in ten (95%) recent visitors have a favorable opinion. Nearly two-thirds (64%) of prospects have a favorable opinion, even though they have never been there. All visitors to Reno Tahoe (both recent and lapsed) are more likely to have a favorable opinion, particularly a very favorable opinion, as compared to prospects. Not surprisingly, prospects are more likely than visitors (both recent and lapsed) to say they cannot rate it.



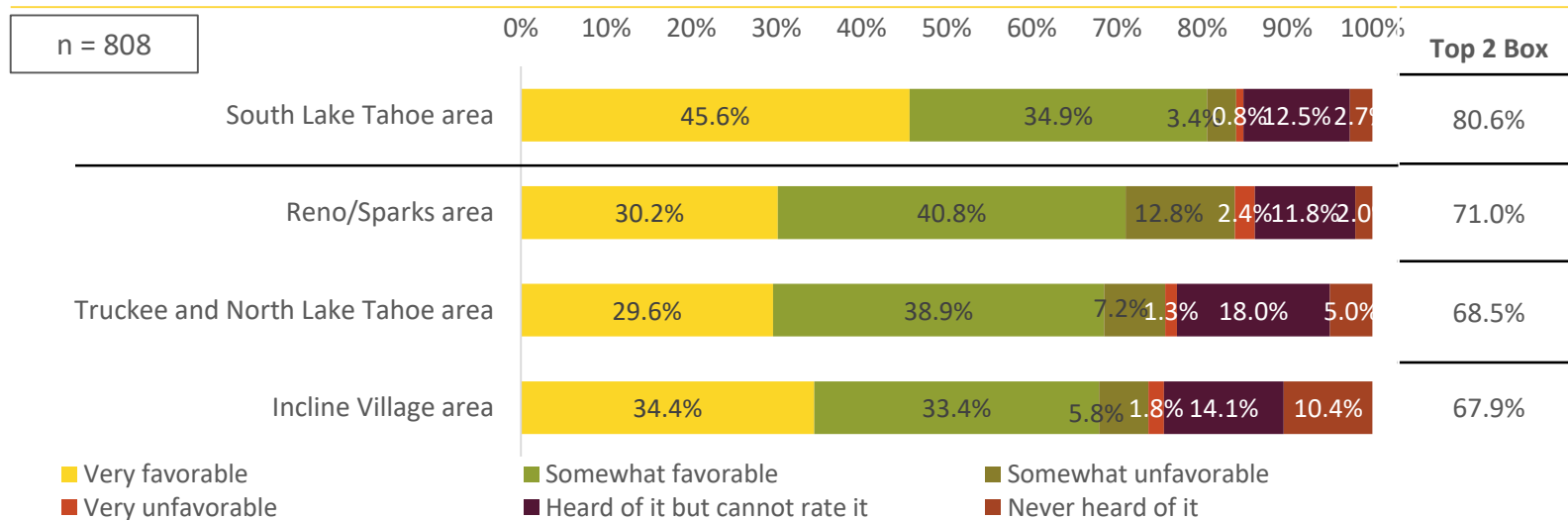
Favorability of Reno Tahoe by Likelihood to Visit (Among Prospects)

| | Total Prospects n = 236 | Very or Somewhat Likely to Visit n = 127 A | Neither Likely nor Unlikely to Visit n = 64 B | Very or Somewhat Unlikely to Visit n = 45 C |
|--------------------------------|----------------------------|---|--|--|
| NET Favorable | 63.6% | 83.1% BC | 44.3% | 29.5% |
| Very favorable | 19.8% | 33.2% BC | 2.4% | 2.2% |
| Somewhat favorable | 43.8% | 49.8% C | 41.9% | 27.3% |
| NET Unfavorable | 5.9% | 1.3% | 9.1% A | 15.6% A |
| Somewhat unfavorable | 4.5% | .7% | 8.6% A | 10.6% A |
| Very unfavorable | 1.4% | .7% | .5% | 5.0% |
| NET Can't Rate It | 30.6% | 15.6% | 46.6% A | 55.0% A |
| Heard of it but cannot rate it | 24.2% | 14.3% | 32.4% A | 43.6% A |
| Never heard of it | 6.4% | 1.3% | 14.2% A | 11.4% A |

Not surprisingly, prospects who say they are likely to visit Reno Tahoe have a significantly higher opinion of Reno Tahoe than those who are neutral or are unlikely to visit.



Favorability of Sub-Regions



The South Lake Tahoe area is the sub-region Las Vegas travelers are most likely to have a favorable opinion of, with eight in ten (81%) rating it as very or somewhat favorable, followed by the Reno/Sparks area, with seven in ten (71%) rating it as favorable. About two-thirds of Las Vegas travelers rate their opinion of the Truckee and North Lake Tahoe area (69%) and the Incline Village area (68%) as very or somewhat favorable.



Favorability of Sub-Regions (by Segment and Visitor Status)

| <i>Top 2 Box: Very or Somewhat Favorable</i> | Total Las Vegas Travelers n = 808 | Ambition Media Target n = 133 A | General Traveler Population n = 675 B | Recent Visitors n = 332 C | Lapsed Visitors n = 240 D | Prospects n = 236 E |
|--|--------------------------------------|---------------------------------------|---|---------------------------------|---------------------------------|---------------------------|
| South Lake Tahoe area | 80.6% | 80.5% | 80.6% | 92.2% DE | 81.5% E | 64.9% |
| Reno/Sparks area | 71.0% | 76.7% | 69.9% | 83.8% DE | 73.1% E | 52.9% |
| Truckee and North Lake Tahoe area | 68.5% | 75.2% | 67.2% | 80.0% DE | 68.9% E | 53.4% |
| Incline Village area | 67.9% | 71.4% | 67.2% | 78.9% DE | 68.3% E | 53.4% |

Between seven and eight in ten Ambition Media Target travelers rate each area as favorable, while between six and eight in ten of those in the General Traveler Population rate each area as favorable. Recent visitors are more likely than lapsed visitors and prospects to rate each area as very or somewhat favorable. Additionally, lapsed visitors are more likely than prospects to rate each area as favorable.



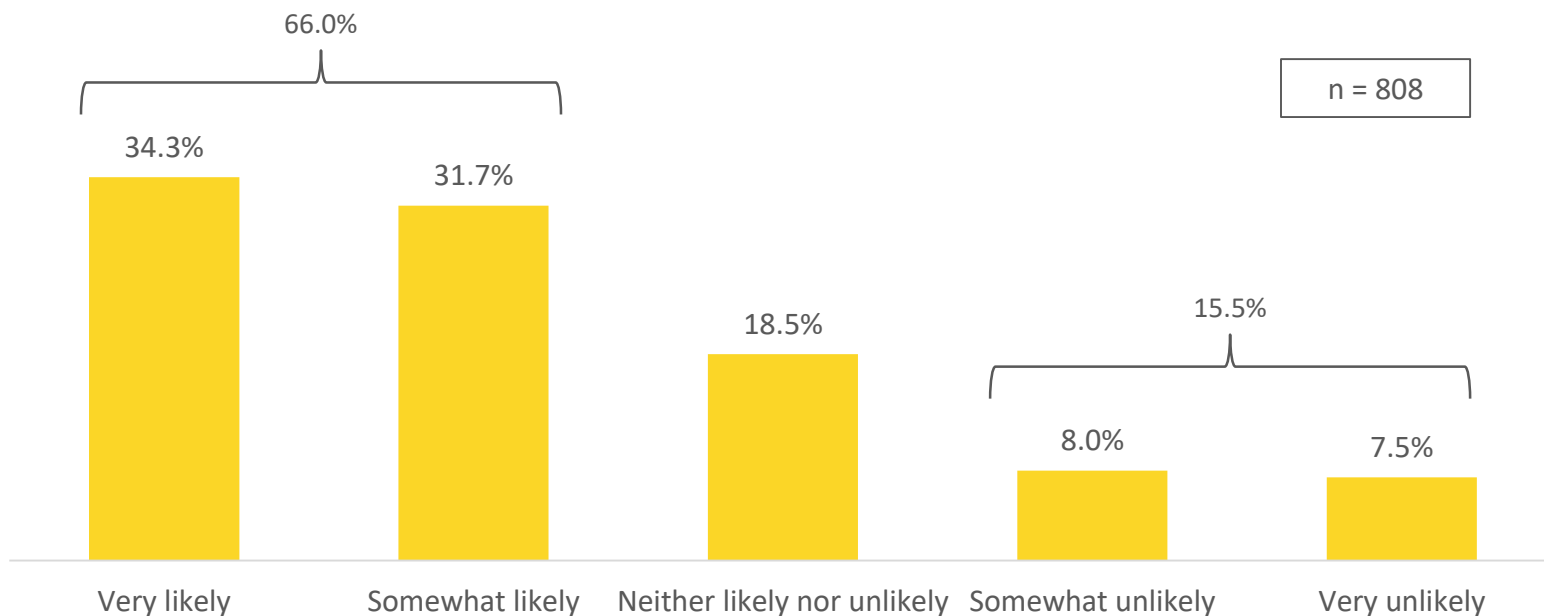
Favorability of Sub-Regions by Likelihood to Visit (Among Prospects)

| <i>Top 2 Box: Very or Somewhat Favorable</i> | Total Prospects n = 236 | Very or Somewhat Likely to Visit n = 127 A | Neither Likely nor Unlikely to Visit n = 64 B | Very or Somewhat Unlikely to Visit n = 45 C |
|--|----------------------------|--|---|---|
| South Lake Tahoe area | 64.9% | 78.0% BC | 55.0% | 37.6% |
| Truckee and North Lake Tahoe area | 53.4% | 71.5% BC | 39.5% C | 16.0% |
| Incline Village area | 53.4% | 66.4% BC | 43.0% | 26.6% |
| Reno/Sparks area | 52.9% | 68.9% BC | 45.0% C | 13.2% |

Overall, prospects who say they are likely to visit Reno Tahoe have a favorable opinion of all of the regions, and are significantly more likely to have a favorable opinion of all regions as compared to the prospects who say they are neutral or unlikely to visit Reno Tahoe.



Likelihood to Visit Reno Tahoe



Two-thirds of Las Vegas travelers say they are very or somewhat likely to visit Reno Tahoe in the next two years. Only 16% say they are unlikely to visit.



Likelihood to Visit Reno Tahoe (by Segment)

| | Total Las Vegas Travelers n = 808 | Ambition Media Target n = 133 A | General Traveler Population n = 675 B |
|--|--------------------------------------|---------------------------------------|---|
| Top 2 Box (Selected very or somewhat likely) | 66.0% | 78.2% B | 63.6% |
| Very likely | 34.3% | 43.6% B | 32.4% |
| Somewhat likely | 31.7% | 34.6% | 31.2% |
| Neither likely nor unlikely | 18.5% | 12.8% | 19.6% |
| Bottom 2 Box (Selected very or somewhat unlikely) | 15.5% | 9.0% | 16.8% A |
| Somewhat unlikely | 8.0% | 3.8% | 8.9% A |
| Very unlikely | 7.5% | 5.3% | 7.9% |

Regardless of segment, Las Vegas travelers are likely to visit Reno Tahoe. Travelers within the Ambition Media Target are significantly more likely to visit, with nearly eight in ten (78%) saying they are somewhat or very likely to visit compared to two-thirds (64%) of those in the General Traveler Population.



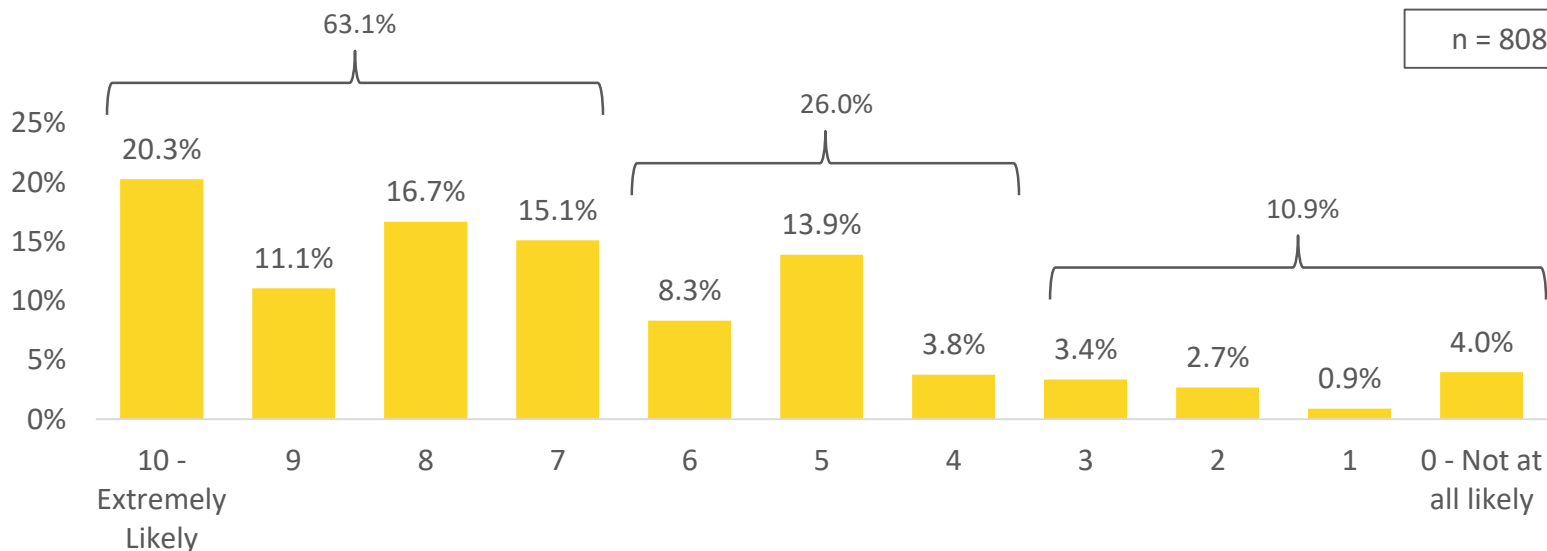
Likelihood to Visit Reno Tahoe (by Visitor Status)

| | Total Las Vegas Travelers n = 808 | Recent Visitors n = 332 A | Lapsed Visitors n = 240 B | Prospects n = 236 C |
|--|--------------------------------------|---------------------------------|---------------------------------|---------------------------|
| Top 2 Box (Selected very or somewhat likely) | 66.0% | 84.3% BC | 49.2% | 56.5% |
| Very likely | 34.3% | 56.7% BC | 18.3% | 18.7% |
| Somewhat likely | 31.7% | 27.6% | 30.9% | 37.8% A |
| Neither likely nor unlikely | 18.5% | 9.3% | 23.7% A | 26.0% A |
| Bottom 2 Box (Selected very or somewhat unlikely) | 15.5% | 6.4% | 27.1% AC | 17.6% A |
| Somewhat unlikely | 8.0% | 3.0% | 16.0% AC | 8.0% A |
| Very unlikely | 7.5% | 3.5% | 11.1% A | 9.5% A |

Not surprisingly, recent visitors are significantly more likely to visit Reno Tahoe in the next two years than lapsed visitors and prospects, with over eight in ten (84%) recent visitors and between four and five in ten lapsed visitors and prospects saying they are likely to visit.



Likelihood to Recommend Reno Tahoe



Nearly two-thirds (63%) of Las Vegas travelers rate their likelihood to recommend Reno Tahoe to other people as a 7, 8, 9, or 10. Notably, one in five travelers rate their likelihood as a 10. Just over one-fourth (26%) are somewhere in the middle, rating their likelihood to recommend a 4, 5 or 6. Only 11% of travelers say they are not likely to recommend Reno Tahoe.



Likelihood to Recommend Reno Tahoe (by Segment)

| | Total Las Vegas Travelers n = 808 | Ambition Media Target n = 133 A | General Traveler Population n = 675 B |
|---|--------------------------------------|---------------------------------------|---|
| Top 4 Box (Rated Likelihood a 7, 8 9 or 10 – Extremely Likely) | 63.1% | 71.4% B | 61.4% |
| Middle 3 Box (Rated Likelihood a 4, 5 or 6) | 26.0% | 18.1% | 27.5% A |
| Bottom 4 Box (Rated Likelihood a 0 – Not at All Likely, 1, 2, or 3) | 10.9% | 10.5% | 11.0% |

Regardless of segment, Las Vegas travelers have a high likelihood to recommend Reno Tahoe to other people. Travelers in the Ambition Media Target are more likely than those in the General Traveler Population to recommend Reno Tahoe, with seven in ten (71%) in the Ambition Media Target likely to recommend Reno Tahoe (rating their likelihood a 7, 8, 9 or 10) compared to six in ten (61%) of those in the General Traveler Population.



Likelihood to Recommend Reno Tahoe (by Visitor Status)

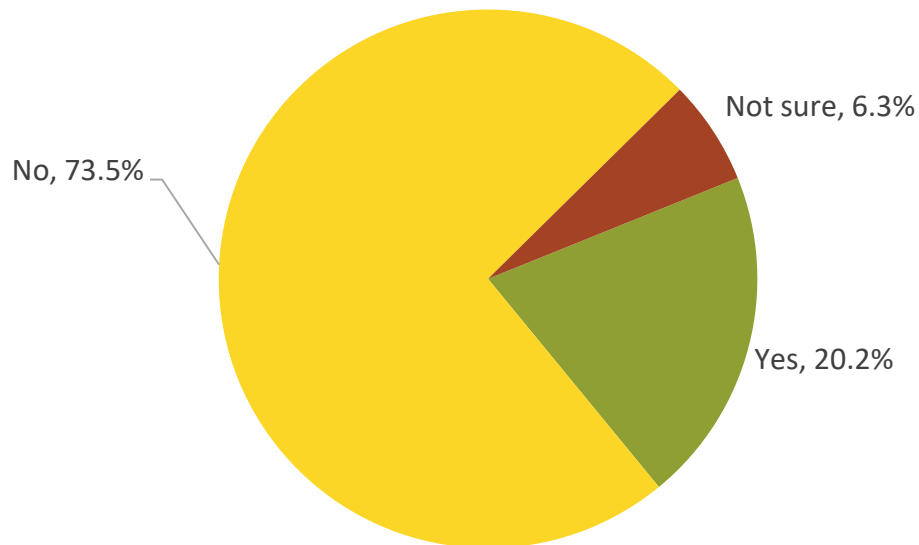
| | Total Las Vegas Travelers n = 808 | Recent Visitors n = 332 A | Lapsed Visitors n = 240 B | Prospects n = 236 C |
|---|--------------------------------------|---------------------------------|---------------------------------|---------------------------|
| Top 4 Box (Rated Likelihood a 7, 8 9 or 10 – Extremely Likely) | 63.1% | 81.9% BC | 65.3% C | 37.1% |
| Middle 3 Box (Rated Likelihood a 4, 5 or 6) | 26.0% | 14.1% | 19.9% | 46.2% AB |
| Bottom 4 Box (Rated Likelihood a 0 – Not at All Likely, 1, 2, or 3) | 10.9% | 4.0% | 14.8% A | 16.7% A |

Recent visitors are the most likely to say they are likely to recommend Reno Tahoe to other people, with 82% rating their likelihood as a 7, 8, 9 or 10.



Website Visitation

n = 808



Nearly three-fourths (74%) of Las Vegas travelers have not visited Reno Tahoe's website, while two in ten travelers have, and 6% are not sure.



Website Visitation (by Visitor Status and Segment)

| | Total Las Vegas Travelers n = 808 | Ambition Media Target n = 133 A | General Traveler Population n = 675 B | Recent Visitors n = 332 C | Lapsed Visitors n = 240 D | Prospects n = 236 E |
|----------|--------------------------------------|---------------------------------------|---|---------------------------------|---------------------------------|---------------------------|
| Yes | 20.2% | 35.3% B | 17.2% | 33.7% DE | 5.9% | 14.6% D |
| No | 73.5% | 60.2% | 76.2% A | 57.0% | 87.4% C | 83.3% C |
| Not sure | 6.3% | 4.5% | 6.6% | 9.3% E | 6.7% E | 2.0% |

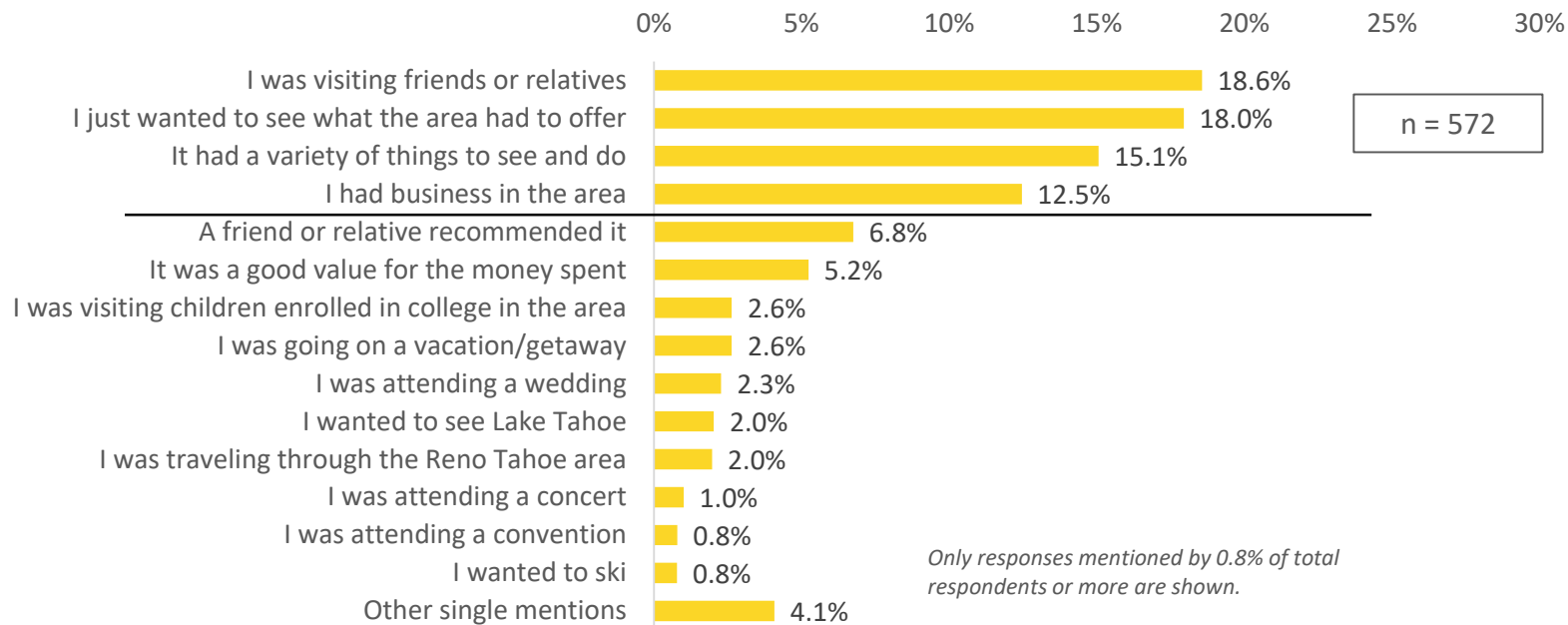
Travelers within the Ambition Media Target are more likely than those in the General Traveler Population to have visited Reno Tahoe’s website. Lapsed visitors are the least likely to have visited the website as compared to recent visitors and prospects.



RECENT TRIP TO RENO TAHOE



Main Reason for Visiting



When asked of the main reason for visiting Reno Tahoe on their most recent trip there, visitors say they were visiting friends or relatives (19%), they just wanted to see what the area had to offer (18%), it had a variety of things to see and do (15%), and they had business in the area (13%). All of these reasons are significantly more likely than the rest, and are statistically equally likely to be the main reason. Notably, only 13% said they were traveling for business and 3% were visiting their children enrolled in college.



Main Reason for Visiting (Cont.)

| | n=572 |
|---|-------|
| NET Vacation/Getaway Trip | 52.4% |
| I just wanted to see what the area had to offer | 18.0% |
| It had a variety of things to see and do | 15.1% |
| A friend or relative recommended it | 6.8% |
| It was a good value for the money spent | 5.2% |
| I was going on a vacation/getaway | 2.6% |
| I wanted to see Lake Tahoe | 2.0% |
| Other Vacation/Getaway Trip mentions | 2.7% |
| <hr/> | |
| I was visiting friends or relatives | 18.6% |
| I had business in the area | 12.5% |
| I was visiting children enrolled in college in the area | 2.6% |
| I was attending a wedding | 2.3% |
| I was traveling through the Reno Tahoe area | 2.0% |
| I was attending a concert | 1.0% |
| I was attending a convention | .8% |

Only responses mentioned by 0.8% of total respondents or more are shown.

When looking at this another way, over half of visitors (52%) say their main reason for visiting Reno Tahoe was related to going on a vacation or getaway trip.



Main Reason for Visiting (by Segment)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Ambition Media Target n = 97 A | General Traveler Population n = 475 B |
|---|---|---|--|
| I was visiting friends or relatives | 18.6% | 14.4% | 19.5% |
| I just wanted to see what the area had to offer | 18.0% | 10.3% | 19.6% A |
| It had a variety of things to see and do | 15.1% | 19.6% | 14.1% |
| I had business in the area | 12.5% | 13.4% | 12.3% |
| A friend or relative recommended it | 6.8% | 9.3% | 6.2% |
| It was a good value for the money spent | 5.2% | 3.1% | 5.7% |
| Other single mentions | 4.1% | 5.2% | 3.8% |
| I was visiting children enrolled in college in the area | 2.6% | 6.2% B | 1.9% |
| I was going on a vacation/getaway | 2.6% | 2.1% | 2.8% |
| I was attending a wedding | 2.3% | 5.2% B | 1.7% |
| I wanted to see Lake Tahoe | 2.0% | 3.1% | 1.8% |
| I was traveling through the Reno Tahoe area | 2.0% | 1.0% | 2.2% |
| I was attending a concert | 1.0% | 1.0% | 1.0% |

Only responses mentioned by 1.0% of total respondents or more are shown.

While the top reasons for visiting remain consistent for visitors in both segments, visitors in the General Traveler Population are more likely to say they just wanted to see what the area had to offer, whereas those in the Ambition Media Target are statistically more likely to say they were visiting children enrolled in college in the area (6%), or that they were attending a wedding in Reno Tahoe (5%).



Main Reason for Visiting (by Segment, cont.)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Ambition Media Target n = 97 A | General Traveler Population n = 475 B |
|---|---|--------------------------------------|---|
| NET Vacation/Getaway Trip | 52.4% | 51.5% | 52.5% |
| I just wanted to see what the area had to offer | 18.0% | 10.3% | 19.6% A |
| It had a variety of things to see and do | 15.1% | 19.6% | 14.1% |
| A friend or relative recommended it | 6.8% | 9.3% | 6.2% |
| It was a good value for the money spent | 5.2% | 3.1% | 5.7% |
| I was going on a vacation/getaway | 2.6% | 2.1% | 2.8% |
| I wanted to see Lake Tahoe | 2.0% | 3.1% | 1.8% |
| Other Vacation/Getaway Trip mentions | 2.7% | 4.1% | 2.4% |
| I was visiting friends or relatives | 18.6% | 14.4% | 19.5% |
| I had business in the area | 12.5% | 13.4% | 12.3% |
| I was visiting children enrolled in college in the area | 2.6% | 6.2% B | 1.9% |
| I was attending a wedding | 2.3% | 5.2% B | 1.7% |
| I was traveling through the Reno Tahoe area | 2.0% | 1.0% | 2.2% |
| I was attending a concert | 1.0% | 1.0% | 1.0% |

Only responses mentioned by 1.0% of total respondents or more are shown.

Going on a vacation or taking a leisure getaway is the top reason for which both Ambition Media Target and General Traveler Population visitors came to the Reno Tahoe area, cited by just over half of each.



Main Reason for Visiting (by Visitor Status)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Recent Visitors n = 332 A | Lapsed Visitors n = 240 B |
|---|---|---------------------------------|---------------------------------|
| NET Vacation/Getaway Trip | 52.4% | 49.2% | 57.3% |
| I just wanted to see what the area had to offer | 18.0% | 14.9% | 22.7% A |
| It had a variety of things to see and do | 15.1% | 15.8% | 13.9% |
| A friend or relative recommended it | 6.8% | 6.3% | 7.5% |
| It was a good value for the money spent | 5.2% | 6.3% | 3.5% |
| I was going on a vacation/getaway | 2.6% | 2.0% | 3.6% |
| I wanted to see Lake Tahoe | 2.0% | 1.6% | 2.7% |
| Other Vacation/Getaway Trip mentions | 2.7% | 2.3% | 3.4% |
| I was visiting friends or relatives | 18.6% | 19.8% | 16.6% |
| I had business in the area | 12.5% | 13.6% | 10.6% |
| I was visiting children enrolled in college in the area | 2.6% | 3.5% | 1.2% |
| I was attending a wedding | 2.3% | 2.5% | 1.9% |
| I was traveling through the Reno Tahoe area | 2.0% | 1.1% | 3.4% A |
| I was attending a concert | 1.0% | 1.1% | .9% |

Only responses mentioned by 1.0% of total respondents or more are shown.

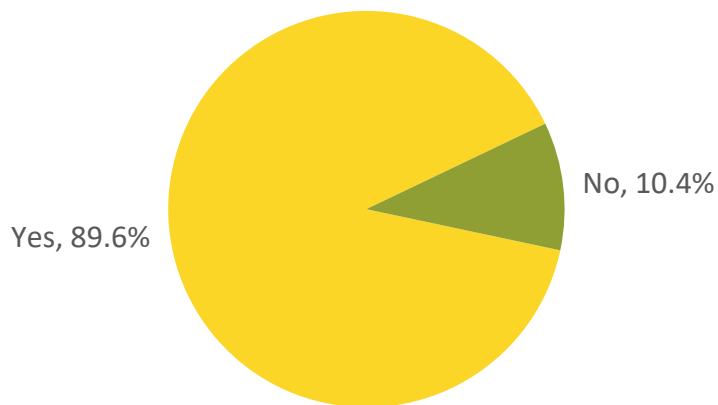
For both recent and lapsed visitors, going on a vacation or getaway is the top reason for why they visited the Reno Tahoe area, with nearly half (49%) of recent visitors and nearly six in ten (57%) lapsed visitors saying they visited for this reason.



Overnight Stay in Reno Tahoe

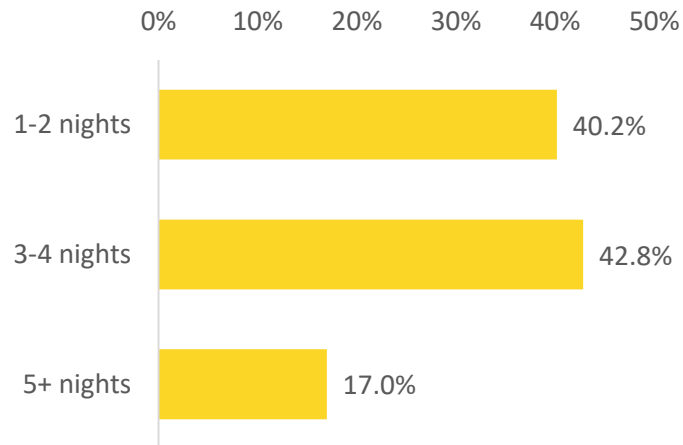
n = 572

Stayed Overnight in Reno Tahoe Area



n = 517

Length of Stay

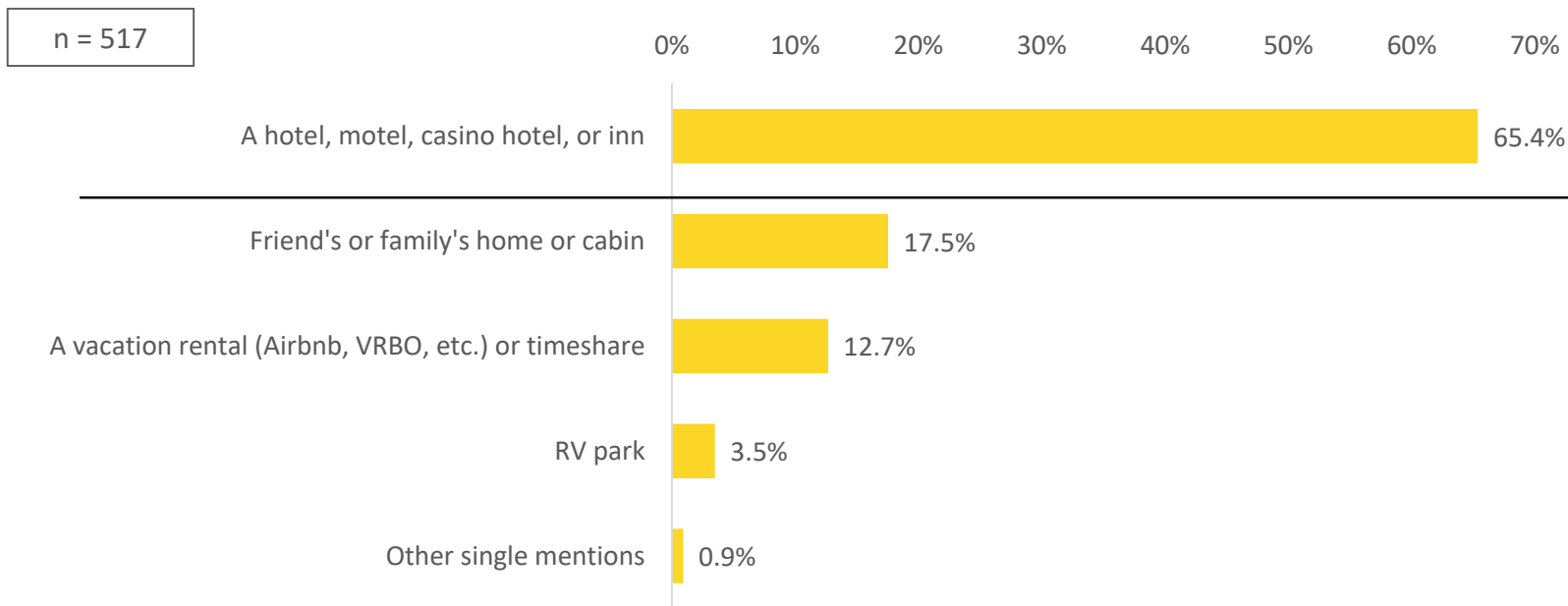


Average Length of Stay: 3.2 nights

Nine in 10 visitors stayed overnight in the Reno Tahoe area on their most recent trip. Of those who did, 4 in 10 stayed between one and two nights, and just over four in ten (43%) stayed between three and four nights. Nearly 2 in 10 (17%) say they stayed in the Reno Tahoe area for five nights or more.



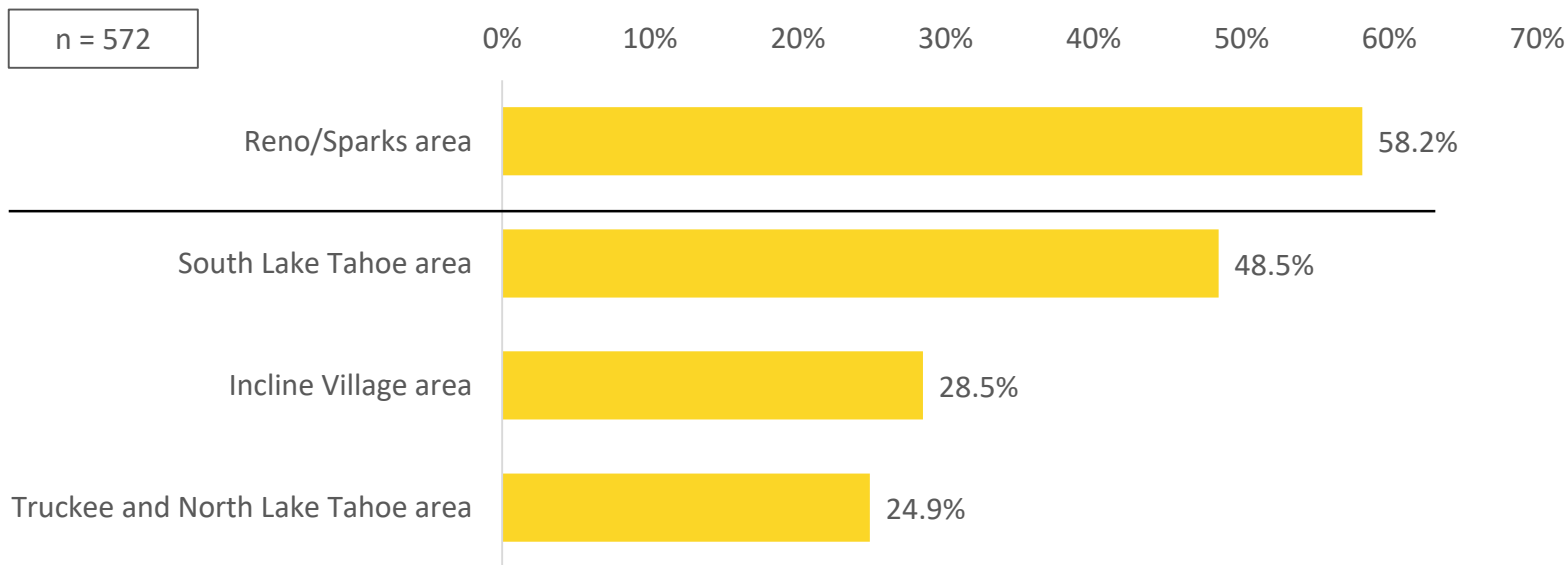
Accommodations Utilized



Nearly two-thirds (65%) of visitors stayed in paid accommodations—a hotel, motel, casino hotel, or inn on their most recent trip to Reno Tahoe. About 2 in 10 (18%) stayed at a friend’s or family’s home or cabin, 13% stayed in a vacation rental or timeshare, and 4% stayed in an RV park.



Sub-Regions Visited



Nearly six in ten (58%) visitors visited the Reno/Sparks area on their most recent trip, and this area is more likely to be visited than any of the other areas. About half (49%) of visitors visited the South Lake Tahoe area, about three in ten (29%) visited the Incline Village area, and one-fourth visited the Truckee and North Lake Tahoe area.



Sub-Regions Visited (by Segment)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Ambition Media Target n = 97 A | General Traveler Population n = 475 B |
|-----------------------------------|---|--------------------------------------|---|
| Reno/Sparks area | 58.2% | 49.5% | 60.1% |
| South Lake Tahoe area | 48.5% | 49.5% | 48.2% |
| Incline Village area | 28.5% | 31.9% | 27.7% |
| Truckee and North Lake Tahoe area | 24.9% | 27.8% | 24.2% |

Reno/Sparks and South Lake Tahoe are the top visited sub-regions, regardless of segment. Half of visitors within the Ambition Media Target visited the Reno/Sparks area and the South Lake Tahoe area on their last trip to Reno Tahoe. Within the General Traveler Population, six in ten visitors visited the Reno/Sparks area, and almost half of visitors (48%) visited the South Lake Tahoe area.



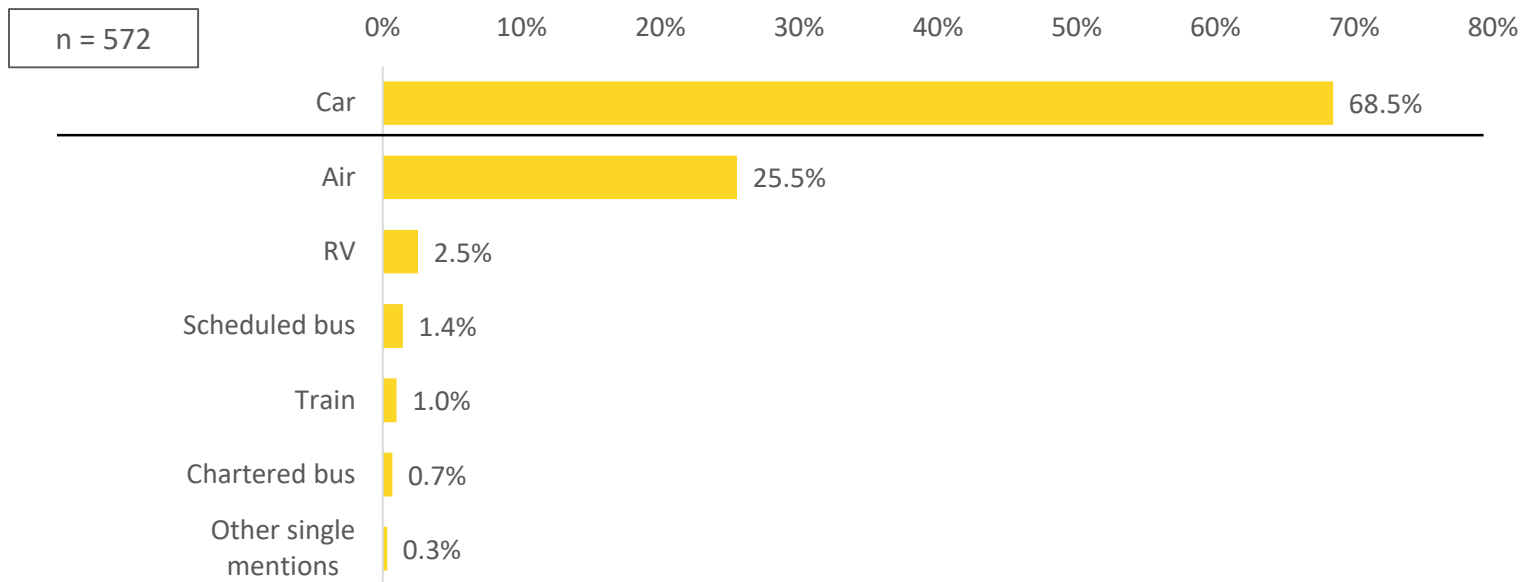
Sub-Regions Visited (by Visitor Status)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Recent Visitors n = 332 A | Lapsed Visitors n = 240 B |
|-----------------------------------|---|---------------------------------|---------------------------------|
| Reno/Sparks area | 58.2% | 61.5% | 53.0% |
| South Lake Tahoe area | 48.5% | 49.7% | 46.5% |
| Incline Village area | 28.5% | 28.8% | 27.9% |
| Truckee and North Lake Tahoe area | 24.9% | 24.5% | 25.5% |

Regardless of visitor status, Reno/Sparks and South Lake Tahoe are the top visited sub-regions. Over five in ten (53%) lapsed visitors and more than six in ten (62%) recent visitors visited the Reno/Sparks area on their most recent trip. Nearly half (47%) of lapsed visitors and half of recent visitors visited the South Lake Tahoe area.



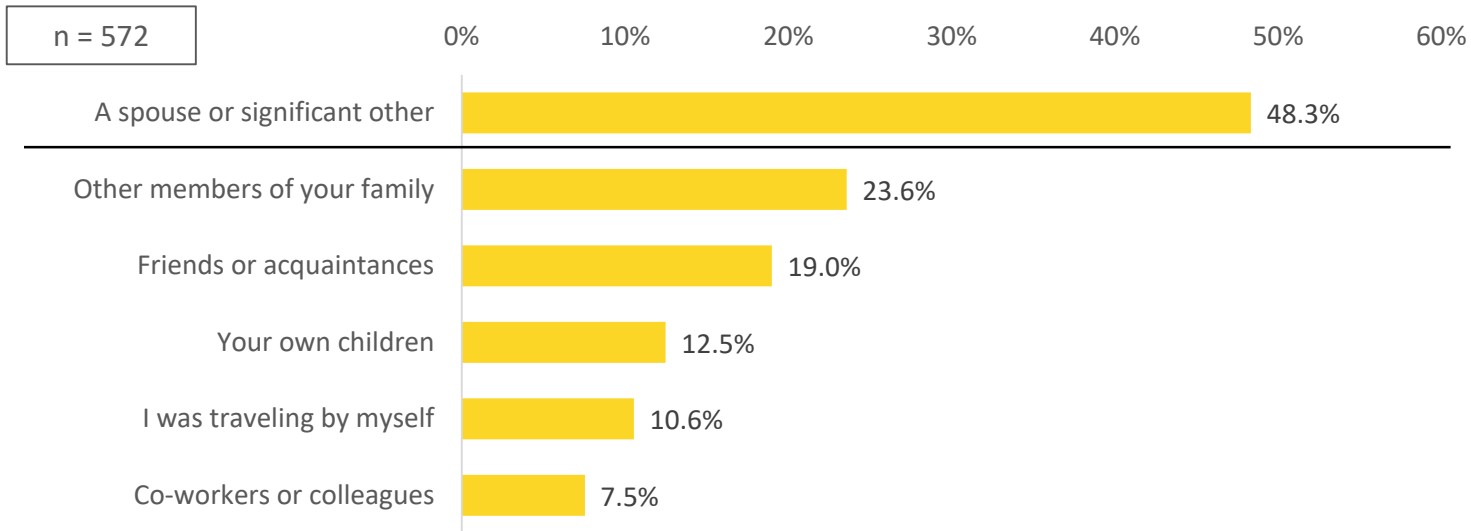
Primary Method of Travel



Nearly seven in ten (69%) visitors' primary method of travel to the Reno Tahoe area was by car. About one-fourth (26%) of Las Vegas travelers traveled by air, and less than 3% each traveled by RV, scheduled bus, train, or chartered bus.



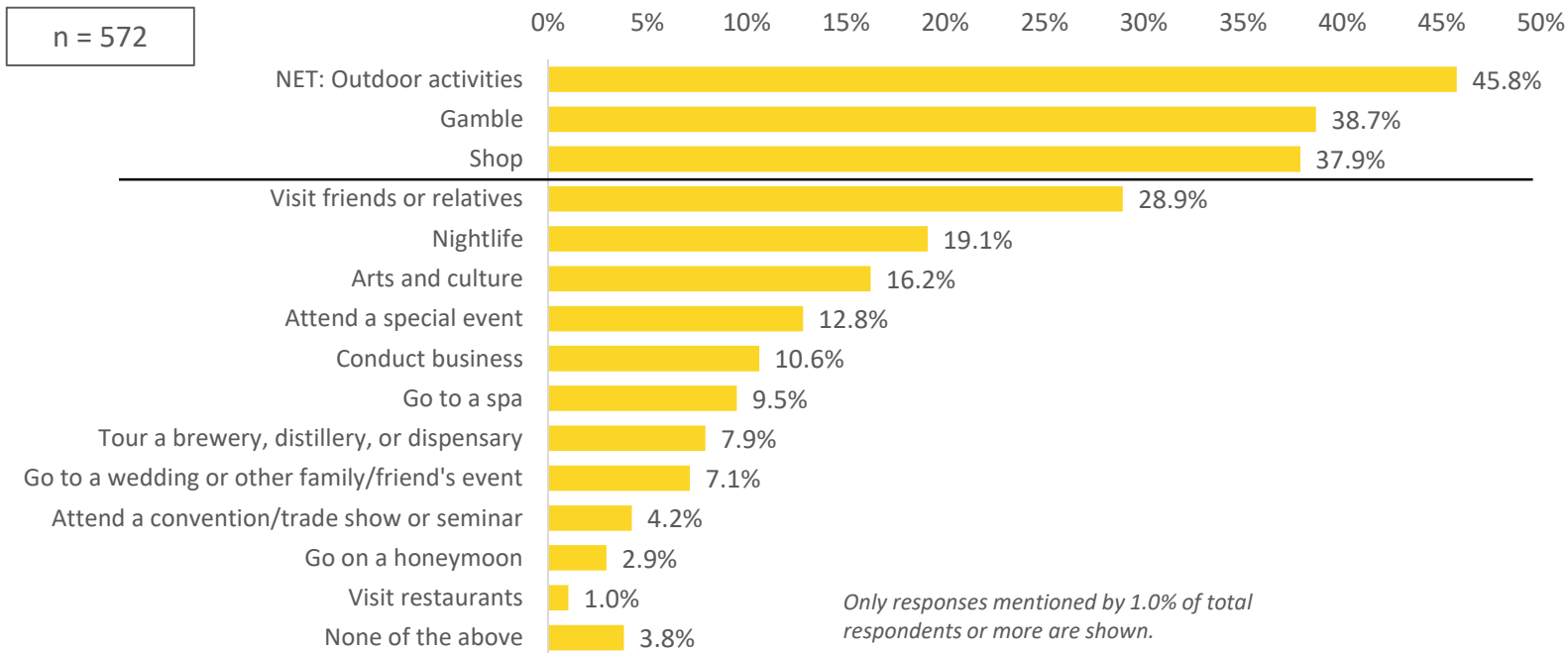
Travel Party



Nearly half (48%) of visitors traveled with their spouse or significant other on their most recent trip to Reno Tahoe. About one-fourth (24%) traveled with other members of their family. Between one and two in 10 traveled with friends or acquaintances or their own children. About one in 10 traveled by themselves, and less than one in 10 traveled with co-workers or colleagues.



Activities on Recent Trip



Nearly half (46%) of visitors participated in outdoor activities, nearly four in ten (39%) participated in gambling, and nearly four in ten (38%) participated in shopping while on their most recent trip to Reno Tahoe. These activities are participated in significantly more than the rest, and are statistically at parity in terms of participation.



Activities on Recent Trip (by Segment)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Ambition Media Target n = 97 A | General Traveler Population n = 475 B |
|--|---|---|--|
| NET: Outdoor activities | 45.8% | 45.4% | 45.9% |
| Gamble | 38.7% | 24.7% | 41.7% A |
| Shop | 37.0% | 36.1% | 38.3% |
| Visit friends or relatives | 28.9% | 27.8% | 29.2% |
| Nightlife | 19.1% | 19.6% | 19.0% |
| Arts and culture | 16.2% | 20.6% | 15.3% |
| Attend a special event | 12.8% | 18.5% | 11.6% |
| Conduct business | 10.6% | 11.3% | 10.5% |
| Go to a spa | 9.5% | 18.6% B | 7.5% |
| Tour a brewery, distillery, or dispensary | 7.9% | 13.4% B | 6.7% |
| Go to a wedding or other family/friend's event | 7.1% | 13.4% B | 5.8% |
| Attend a convention/trade show or seminar | 4.2% | 5.1% | 4.0% |
| Go on a honeymoon | 2.9% | 6.2% B | 2.2% |
| Visit restaurants | 1.0% | 1.0% | 1.0% |

Only responses mentioned by 1.0% of total respondents or more are shown.

Regardless of segment, outdoor activities and shopping are the top activities. Visitors within the General Traveler Population are more likely to gamble while on a trip to the Reno Tahoe area as compared to those in the Ambition Media Target. Visitors within the Ambition Media Target are more likely to go to a spa, tour a brewery, distillery, or dispensary, go to a wedding or other family or friend's event, or go on a honeymoon while visiting Reno Tahoe.



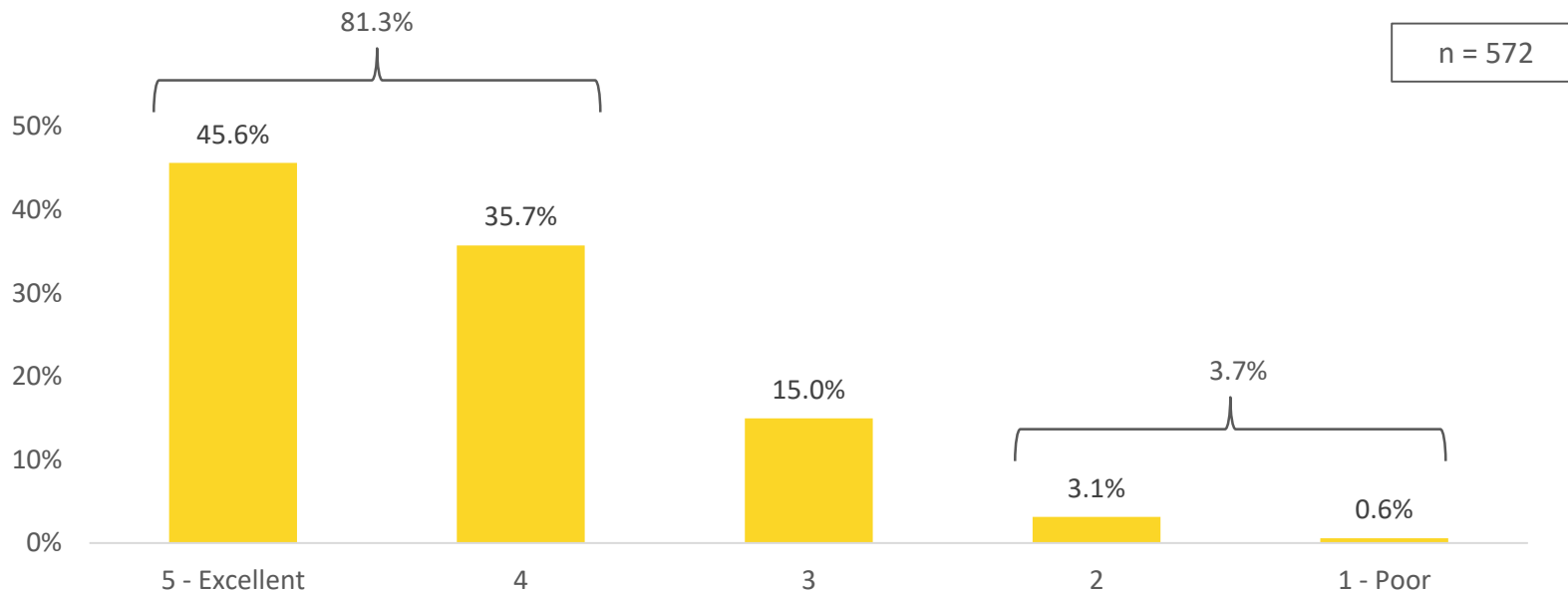
Special Events Attended

| <i>Coded Verbatim Response</i> | Visitors Who Attended a Special Event n=60 |
|----------------------------------|--|
| A wedding | 14.8% |
| NET: Sporting Event | 12.4% |
| A bowling tournament/convention | 4.6% |
| A baseball/softball tournament | 4.0% |
| Other sporting event | 3.9% |
| NET: Festival | 11.7% |
| Lake Tahoe Shakespeare Festival | 4.3% |
| A festival in general | 4.1% |
| A food festival/event | 3.4% |
| A concert | 11.6% |
| NET: Party | 8.9% |
| A party | 6.1% |
| A birthday party | 2.8% |
| A high school/college graduation | 8.0% |
| A slot tournament | 3.4% |
| A convention | 3.2% |
| Reno Air Races | 2.3% |
| Hot August Nights | 2.3% |
| A cultural event | 1.7% |
| Other single mentions | 20.3% |

- + For those that attended a special event on their trip to the Reno Tahoe area, weddings, sporting events, festivals, concerts, parties, or graduations were the most frequently mentioned.



Rating of Experience in Reno Tahoe



Over eight in ten (81%) visitors rate their experience on their most recent trip to Reno Tahoe as a 5 or 4.



Rating of Experience in Reno Tahoe (by Segment)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Ambition Media Target n = 97 A | General Traveler Population n = 475 B |
|---|---|--------------------------------------|---|
| Top 2 Box (Selected a 5 or 4) | 81.3% | 86.6% | 80.2% |
| 5 – Excellent | 45.6% | 58.8% B | 42.8% |
| 4 | 35.7% | 27.8% | 37.4% |
| 3 | 15.0% | 12.4% | 15.5% |
| Bottom 2 Box (Selected a 2 or 1) | 3.7% | 1.0% | 4.3% |
| 2 | 3.1% | 1.0% | 3.6% |
| 1 – Poor | .6% | .0% | .7% |

Both Ambition Media Target visitors and those in the General Traveler Population have high ratings of their experience in Reno Tahoe, with between eight and nine in ten visitors rating their experience a 5 or 4 in both segments; however, those in the Ambition Media Target are more likely to rate their experience a 5.



Rating of Experience in Reno Tahoe (by Visitor Status)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Recent Visitors n = 332 A | Lapsed Visitors n = 240 B |
|---|--|---------------------------------|---------------------------------|
| Top 2 Box (Selected a 5 or 4) | 81.3% | 85.4% B | 75.0% |
| 5 – Excellent | 45.6% | 51.5% B | 36.5% |
| 4 | 35.7% | 33.9% | 38.5% |
| 3 | 15.0% | 12.4% | 19.0% A |
| Bottom 2 Box (Selected a 2 or 1) | 3.7% | 2.2% | 6.0% A |
| 2 | 3.1% | 2.0% | 4.9% |
| 1 - Poor | .6% | .2% | 1.1% |

While both recent and lapsed visitors have high ratings of their experience in Reno Tahoe, with three-fourths of lapsed visitors and more than eight in ten (85%) recent visitors rating it a 5 or 4, recent visitors are more likely to rate their experience a 5 or 4, whereas lapsed visitors are more likely to rate their experience a 3, 2 or 1.



Reason for High Rating of Reno Tahoe

| <i>Coded Verbatim Response</i> | <i>(n=463)</i> |
|---|----------------|
| NET: Beauty/Nature | 30.6% |
| Reno Tahoe has beautiful scenery | 24.7% |
| I enjoyed the nature/outdoors in Reno Tahoe | 4.2% |
| Lake Tahoe is beautiful | 3.7% |
| NET: Enjoyed Trip | 23.1% |
| I enjoyed my time in Reno Tahoe | 11.9% |
| I had a lot of fun in Reno Tahoe | 9.8% |
| Other Enjoyed Trip mentions | 2.7% |
| NET: Favorable Opinion of Reno Tahoe | 10.7% |
| Reno Tahoe is a great area | 5.4% |
| I love Reno Tahoe | 5.3% |
| NET: Variety of Activities | 9.4% |
| Reno Tahoe has a lot of different things to do | 9.3% |
| NET: Time Spent With Family and Friends | 8.4% |
| I enjoyed spending time with my family in Reno Tahoe | 6.0% |
| I enjoyed spending time with my friends in Reno Tahoe | 3.7% |
| NET: Outdoor Activities | 8.2% |
| Reno Tahoe has great outdoor activities | 6.3% |

| <i>Coded Verbatim Response</i> | <i>(n=463)</i> |
|---|----------------|
| NET: Enjoyed the Weather | 7.9% |
| Reno Tahoe has great weather | 6.6% |
| Reno Tahoe has good food/restaurants | 7.8% |
| NET: Vibe/Personality | 7.8% |
| Reno Tahoe was laidback/relaxing | 4.6% |
| Other Vibe/Personality mentions | 3.4% |
| I liked my hotel/accommodations in Reno Tahoe | 6.2% |
| NET: Reno Tahoe Locals | 5.0% |
| Reno Tahoe has friendly locals | 4.7% |
| I enjoyed gambling in Reno Tahoe | 2.4% |
| NET: My Experience in Reno Tahoe Could Have Been Better | 3.7% |
| My trip to Reno Tahoe was good but not the best trip I've been on | 2.4% |
| Reno Tahoe is clean/has clean air | 2.8% |
| I enjoyed the events I attended in Reno Tahoe | 2.3% |
| Reno Tahoe is a nice getaway from where I live | 2.3% |
| NET: Value/Affordability | 2.3% |
| Other single mentions | 7.4% |

Only responses mentioned by 2.3% of total respondents or more are shown.

When asked why they rated their experience in Reno Tahoe as a 5 or 4, visitors say it is because of the beauty or nature (31%), they enjoyed their trip or had a lot of fun there (23%), they think Reno Tahoe is a great area or they love Reno Tahoe (11%), there is a variety of activities to do there (9%), they spent time with family and friends (8%), there were outdoor activities (8%), or they enjoyed the weather (8%), among others.



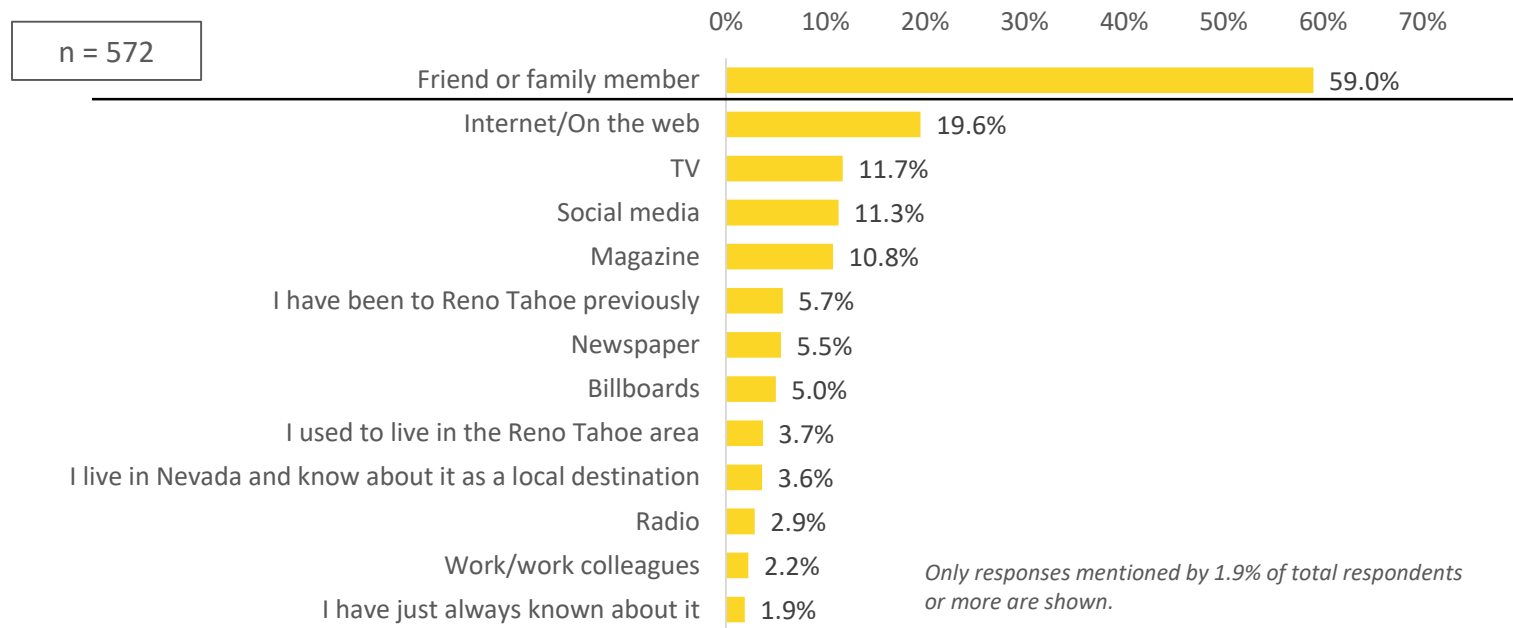
Reason for Low Rating of Reno Tahoe

| <i>Coded Verbatim Response</i> | No. of Mentions |
|--|------------------------|
| Reno Tahoe has limited things to do/is boring | n = 4 |
| I did not feel safe in Reno Tahoe/Reno Tahoe has a crime problem | n = 4 |
| Reno Tahoe is old/outdated | n = 3 |
| Reno Tahoe has trash/garbage issues | n = 3 |
| Reno Tahoe did not impress me | n = 3 |
| Reno Tahoe is hard to navigate/has too much traffic | n = 2 |
| Other single mentions | n = 7 |

For the very few (4%) visitors who rated their Reno Tahoe experience a 2 or 1, they said it is because the area has limited things to do, it is old or outdated, they did not feel safe there or feel it has a crime problem, it has issues with trash or garbage, it did not impress them, or that it is hard to navigate or has too much traffic.



How They Heard About Reno Tahoe



When asked how they heard about the Reno Tahoe area, visitors are most likely to say through a friend or family member (59%). Other frequently mentioned ways include via the internet (20%), TV (12%), social media (11%), or a magazine (11%).



How They Heard About Reno Tahoe (by Segment)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Ambition Media Target n = 97 A | General Traveler Population n = 475 B |
|---|---|--------------------------------------|---|
| Friend or family member | 59.0% | 60.8% | 58.6% |
| Internet/On the web | 19.6% | 20.6% | 19.3% |
| TV | 11.7% | 16.5% | 10.7% |
| Social media | 11.3% | 26.8% B | 8.0% |
| Magazine | 10.8% | 14.4% | 10.0% |
| I have been to Reno Tahoe previously | 5.7% | 4.1% | 6.0% |
| Newspaper | 5.5% | 8.2% | 4.9% |
| Billboards | 5.0% | 12.4% B | 3.4% |
| I used to live in the Reno Tahoe area | 3.7% | 2.1% | 4.1% |
| I live in Nevada and know about it as a local destination | 3.6% | 1.0% | 4.2% |
| Radio | 2.9% | 9.3% B | 1.5% |
| Work/work colleagues | 2.2% | .0% | 2.7% |
| I have just always known about it | 1.9% | .0% | 2.3% |

Only responses mentioned by 1.9% of total respondents or more are shown.

While a friend or family member remains the top way visitors heard about Reno Tahoe across both segments, visitors in the Ambition Media Target are more likely than those in the General Traveler Population to say they heard about it through social media, billboards, and the radio.



How They Heard About Reno Tahoe (by Visitor Status)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Recent Visitors n = 332 A | Lapsed Visitors n = 240 B |
|---|---|---------------------------------|---------------------------------|
| Friend or family member | 59.0% | 54.6% | 65.9% A |
| Internet/On the web | 19.6% | 23.6% B | 13.3% |
| TV | 11.7% | 14.6% B | 7.3% |
| Social media | 11.3% | 15.5% B | 4.7% |
| Magazine | 10.8% | 13.0% B | 7.3% |
| I have been to Reno Tahoe previously | 5.7% | 8.1% B | 2.0% |
| Newspaper | 5.5% | 7.1% B | 3.0% |
| Billboards | 5.0% | 6.4% | 2.9% |
| I used to live in the Reno Tahoe area | 3.7% | 5.3% B | 1.2% |
| I live in Nevada and know about it as a local destination | 3.6% | 2.9% | 4.8% |
| Radio | 2.9% | 4.3% B | .8% |
| Work/work colleagues | 2.2% | 2.3% | 2.2% |
| I have just always known about it | 1.9% | 2.3% | 1.2% |

Only responses mentioned by 1.9% of total respondents or more are shown.

While a friend or family member remains the top way visitors heard about the Reno Tahoe area, regardless of visitor status, lapsed visitors are more likely to have heard about it this way as compared to recent visitors. Recent visitors are more likely to say they heard about Reno Tahoe from all of the following sources: the internet, TV, social media, magazines, having been to Reno Tahoe previously, newspapers, having lived in the Reno Tahoe area previously, and via radio.



DEMOGRAPHICS AND PSYCHOGRAPHICS



Demographics: Segment and Visitor Status

| | | Total Las Vegas Travelers n = 808 | Segment | | Visitor Status | | |
|-------------------|---------------------------|--------------------------------------|---------------------------------------|---|---------------------------------|---------------------------------|---------------------------|
| | | | Ambition Media Target n = 133 A | General Traveler Population n = 675 B | Recent Visitors n = 332 C | Lapsed Visitors n = 240 D | Prospects n = 236 E |
| Age | 21-39 | 39.9% | 63.9% B | 23.0% | 40.6% D | 27.3% | 49.5% D |
| | 40-59 | 35.9% | 36.1% | 29.6% | 37.4% | 34.0% | 35.7% |
| | 60 or older | 24.1% | 0.0% | 47.4% A | 22.0% E | 38.8% CE | 14.8% |
| HHI Income | Less than \$50,000 | 35.8% | 0.0% | 33.0% A | 29.0% | 32.2% | 47.4% CD |
| | \$50,000-\$99,999 | 34.5% | 41.4% | 39.6% | 31.2% | 36.6% | 37.0% |
| | \$100,000 or more | 26.1% | 58.6% B | 22.2% | 34.9% DE | 26.5% E | 14.6% |
| Marital Status | Married | 51.3% | 61.7% B | 49.2% | 55.3% E | 53.4% | 44.4% |
| | Single | 23.9% | 22.6% | 24.1% | 20.9% | 21.8% | 29.4% C |
| | Divorced | 10.0% | 3.8% | 11.3% A | 9.0% | 8.1% | 12.9% |
| | In a domestic partnership | 9.6% | 10.5% | 9.4% | 10.5% | 9.2% | 8.7% |
| | Widowed | 3.5% | 0.0% | 4.2% A | 3.5% | 4.4% | 2.7% |
| Gender | Male | 39.1% | 37.6% | 39.4% | 45.9% E | 37.0% | 32.0% |
| | Female | 60.8% | 61.7% | 60.6% | 54.1% | 63.0% | 67.6% C |
| Employment Status | Employed | 58.6% | 85.0% B | 53.4% | 62.6% D | 50.9% | 59.7% |
| | Retired | 23.1% | 3.0% | 27.0% A | 21.9% | 33.5% CE | 16.0% |
| | Homemaker | 8.1% | 9.0% | 7.9% | 7.1% | 4.6% | 12.4% D |
| | Unemployed | 5.3% | 2.3% | 5.9% | 2.9% | 5.5% | 8.2% C |
| | Student | 2.7% | .0% | 3.3% A | 4.1% E | 3.2% | .6% |
| | Disabled | 1.0% | .0% | 1.2% | .0% | 1.0% | 2.3% C |

Only responses mentioned by 1.0% of total respondents or more are shown.

Demographics: Segment and Visitor Status (cont.)

| | | Total Las Vegas Travelers n = 808 | Segment | | Visitor Status | | |
|----------------------|---------------------------------------|--------------------------------------|---------------------------------------|---|---------------------------------|---------------------------------|---------------------------|
| | | | Ambition Media Target n = 133 A | General Traveler Population n = 675 B | Recent Visitors n = 332 C | Lapsed Visitors n = 240 D | Prospects n = 236 E |
| Ethnicity | Hispanic/Latino | 10.8% | 10.5% | 10.9% | 7.7% | 9.7% | 15.7% C |
| | Not Hispanic/Latino | 87.5% | 88.7% | 87.3% | 89.5% | 89.7% | 83.2% |
| Race | White/Caucasian | 75.8% | 69.9% | 77.0% | 79.1% E | 77.8% | 70.1% |
| | Asian | 7.6% | 15.8% B | 5.9% | 6.9% | 10.0% | 6.5% |
| | Black/African American | 7.0% | 5.3% | 7.3% | 4.7% | 2.1% | 14.0% CD |
| | Bi-racial/Multi-racial | 3.2% | 6.8% B | 2.5% | 1.3% | 4.5% C | 4.7% C |
| | Native American | 1.3% | .0% | 1.5% | 2.7% DE | .0% | .4% |
| Presence of Children | Yes | 30.6% | 48.9% B | 27.0% | 35.8% D | 19.8% | 32.7% D |
| | No | 69.0% | 51.1% | 72.5% A | 63.6% | 80.2% CE | 66.7% |
| Education | Less than high school | 6.4% | 3.8% | 6.9% | 5.8% | 4.3% | 8.7% |
| | Graduated high school | 9.2% | 3.0% | 10.5% A | 9.8% | 7.2% | 10.1% |
| | Technical/Vocational | 6.9% | 5.3% | 7.3% | 5.1% | 5.6% | 10.4% C |
| | Some college | 23.3% | 13.5% | 25.3% A | 19.6% | 23.9% | 27.7% C |
| | Graduated college | 35.9% | 42.1% | 34.6% | 37.2% | 37.6% | 32.8% |
| | Graduate/Professional/Masters/PhD/MBA | 18.3% | 22.3% B | 15.5% | 22.4% E | 21.4% E | 10.3% |
| LGBTQ | Yes | 10.5% | 15.8% B | 9.4% | 11.7% | 9.1% | 10.0% |
| | No | 86.4% | 82.0% | 87.3% | 84.1% | 88.2% | 87.8% |

Only responses mentioned by 1.0% of total respondents or more are shown.



Psychographics: Segment and Visitor Status

| | | | Segment | | Visitor Status | | |
|---------------------------------|--|-------|--------------------------------------|---------------------------------------|---|---------------------------------|---------------------------------|
| | | | Total Las Vegas Travelers n = 808 | Ambition Media Target n = 133 A | General Traveler Population n = 675 B | Recent Visitors n = 332 C | Lapsed Visitors n = 240 D |
| Ambition Statements (Top 2 Box) | Risk taking is exciting to me | 54.5% | 82.0% B | 49.1% | 62.5% D | 40.9% | 55.5% D |
| | I strive to achieve a high social status | 34.7% | 60.9% B | 29.5% | 43.9% DE | 24.2% | 31.4% |
| | I like to live a life that impresses others | 34.1% | 60.9% B | 28.8% | 42.0% D | 21.2% | 34.5% D |
| | I enjoy being the center of attention | 32.1% | 50.4% B | 28.4% | 39.4% DE | 22.8% | 30.2% |
| Travel Statements (Top 2 Box) | When I find a vacation spot I like, I go back whenever I can | 90.2% | 89.5% | 90.4% | 90.5% | 88.2% | 91.6% |
| | When I learn about a great vacation, I typically recommend it to people I know | 90.8% | 94.7% | 90.0% | 93.8% D | 86.2% | 90.7% |
| | I frequently choose active vacations with lots to do | 78.9% | 82.7% | 78.1% | 85.7% DE | 72.6% | 75.4% |
| | Planning a vacation is just as fun as the trip itself | 75.0% | 77.4% | 74.5% | 78.4% | 72.9% | 72.2% |
| | I'd rather take a few weekend vacations than one long vacation | 62.6% | 72.2% B | 60.8% | 68.5% DE | 58.9% | 58.2% |

Only responses mentioned by 1.0% of total respondents or more are shown.



Demographics: Likelihood to Visit (Among Prospects)

| | | <i>Likelihood to Visit Among Prospects</i> | | | |
|----------------------|---------------------------|--|---|--|--|
| | | Total Prospects n = 236 | Very or Somewhat Likely to Visit n = 127 A | Neither Likely nor Unlikely to Visit n = 64 B | Very or Somewhat Unlikely to Visit n = 45 C |
| Age | 21-39 | 49.5% | 53.3% | 48.5% | 38.4% |
| | 40-59 | 35.7% | 36.0% | 34.1% | 37.1% |
| | 60 or older | 14.8% | 10.7% | 17.4% | 24.4% A |
| HHI Income | Less than \$50,000 | 47.4% | 45.8% | 48.6% | 50.8% |
| | \$50,000-\$99,999 | 37.0% | 38.7% | 34.9% | 34.5% |
| | \$100,000 or more | 14.6% | 15.1% | 15.5% | 10.1% |
| Marital Status | Married | 44.4% | 47.5% | 40.7% | 39.7% |
| | Single | 29.4% | 29.5% | 29.5% | 29.1% |
| | Divorced | 12.9% | 9.3% | 14.3% | 22.5% A |
| | In a domestic partnership | 8.7% | 10.8% | 8.4% | 2.2% |
| | Widowed | 2.7% | 1.6% | 4.2% | 4.3% |
| Gender | Male | 32.0% | 35.9% C | 32.3% | 19.2% |
| | Female | 67.6% | 64.1% | 67.7% | 79.7% |
| Employment Status | Employed | 59.7% | 62.3% | 57.5% | 54.8% |
| | Retired | 16.0% | 12.2% | 17.7% | 25.7% A |
| | Homemaker | 12.4% | 16.7% | 5.4% | 8.6% |
| | Unemployed | 8.2% | 7.0% | 9.1% | 10.9% |
| | Disabled | 2.3% | .7% | 7.4% A | .0% |

Only responses mentioned by 1.1% of total respondents or more are shown.



Demographics: Likelihood to Visit (Among Prospects, cont.)

| | | Likelihood to Visit Among Prospects | | | |
|----------------------|---------------------------------------|--|--|---|---|
| | | Total Prospects n = 236 | Very or Somewhat Likely to Visit n = 127 A | Neither Likely nor Unlikely to Visit n = 64 B | Very or Somewhat Unlikely to Visit n = 45 C |
| Ethnicity | Hispanic/Latino | 15.7% | 16.3% | 15.5% | 14.1% |
| | Not Hispanic/Latino | 83.2% | 83.7% | 81.9% | 83.7% |
| Race | White/Caucasian | 70.1% | 68.3% | 72.8% | 71.6% |
| | Black/African American | 14.0% | 14.7% | 9.9% | 17.5% |
| | Asian | 6.5% | 5.6% | 9.7% | 4.4% |
| | Bi-racial/Multi-racial | 4.7% | 4.4% | 5.5% | 4.4% |
| Presence of Children | Yes | 32.7% | 38.2% C | 31.5% | 16.7% |
| | No | 66.7% | 61.8% | 68.5% | 79.7% |
| Education | Less than high school | 8.7% | 9.5% | 5.1% | 11.7% |
| | Graduated high school | 10.1% | 9.9% | 14.2% | 4.8% |
| | Technical/Vocational | 10.4% | 9.5% | 6.4% | 19.0% |
| | Some college | 27.7% | 30.8% | 27.8% | 17.7% |
| | Graduated college | 32.8% | 30.2% | 39.1% | 31.6% |
| | Graduate/Professional/Masters/PhD/MBA | 10.3% | 10.2% | 7.3% | 15.2% |
| LGBTQ | Yes | 10.0% | 9.6% | 8.9% | 12.8% |
| | No | 87.8% | 88.5% | 88.1% | 85.0% |

Only responses mentioned by 1.3% of total respondents or more are shown.



Psychographics and Segments: Likelihood to Visit (Among Prospects)

| | | Likelihood to Visit Among Prospects | | | |
|------------------------------------|--|--|--|---|---|
| | | Total Prospects n = 236 | Very or Somewhat Likely to Visit n = 127 A | Neither Likely nor Unlikely to Visit n = 64 B | Very or Somewhat Unlikely to Visit n = 45 C |
| Segment | Ambition Media Target | 13.9% | 17.1% | 7.4% | 13.2% |
| | General Traveling Population | 86.1% | 82.9% | 92.6% | 86.8% |
| Ambition Statements (Top 2 Box) | Risk taking is exciting to me | 55.5% | 60.1% | 52.4% | 45.3% |
| | I strive to achieve a high social status | 31.4% | 38.8% C | 24.3% | 17.9% |
| | I like to live a life that impresses others | 34.5% | 40.8% | 28.2% | 23.9% |
| | I enjoy being the center of attention | 30.2% | 32.5% C | 38.1% C | 11.1% |
| Travel Statements (Top 2 Box) | When I find a vacation spot I like, I go back whenever I can | 91.6% | 96.3% C | 88.1% | 81.9% |
| | When I learn about a great vacation, I typically recommend it to people I know | 90.7% | 96.5% BC | 87.1% | 77.4% |
| | I frequently choose active vacations with lots to do | 75.4% | 80.1% C | 76.5% | 58.8% |
| | Planning a vacation is just as fun as the trip itself | 72.2% | 74.4% | 68.7% | 70.4% |
| | I'd rather take a few weekend vacations than one long vacation | 58.2% | 66.7% BC | 49.6% | 43.3% |

Only responses mentioned by 1.0% of total respondents or more are shown.



Demographics: Source

| | | Source | | | |
|----------------------|---------------------------|--------------------------------------|-----------------------|----------------------------|------------------------------|
| | | Total Las Vegas Travelers n = 808 | Panel n = 732 A | Facebook Ad n = 34 B | Database List n = 42 C |
| Age | 21-39 | 39.9% | 40.9% | 35.7% | 27.5% |
| | 40-59 | 35.9% | 34.7% | 38.8% | 53.9% A |
| | 60 or older | 24.1% | 24.4% | 25.5% | 18.6% |
| HHI Income | Less than \$50,000 | 35.8% | 35.9% | 44.7% | 26.9% |
| | \$50,000-\$99,999 | 34.5% | 34.5% | 33.1% | 35.4% |
| | \$100,000 or more | 26.1% | 26.4% | 16.8% | 28.6% |
| Marital Status | Married | 51.3% | 51.6% | 39.6% | 55.0% |
| | Single | 23.9% | 24.4% | 20.6% | 17.2% |
| | Divorced | 10.0% | 9.7% | 11.6% | 13.6% |
| | In a domestic partnership | 9.6% | 8.9% | 17.6% | 14.2% |
| | Widowed | 3.5% | 3.4% | 10.5% AC | .0% |
| Gender | Male | 39.1% | 37.8% | 44.6% | 55.0% A |
| | Female | 60.8% | 62.0% C | 55.4% | 45.0% |
| Employment Status | Employed | 58.6% | 57.7% | 67.5% | 66.9% |
| | Retired | 23.1% | 23.6% | 21.4% | 15.7% |
| | Homemaker | 8.1% | 7.9% | 11.0% | 10.3% |
| | Unemployed | 5.3% | 5.9% | .0% | .0% |
| | Student | 2.7% | 2.8% | .0% | 4.0% |
| | Disabled | 1.0% | 1.1% | .0% | .0% |

Only responses mentioned by 1.0% of total respondents or more are shown.



Demographics: Source (cont.)

| | | Visitor Status | | | |
|----------------------|---------------------------------------|--|--------------------------------|-------------------------------------|---------------------------------------|
| | | Total Las Vegas Travelers n = 808 | Panel n = 732 A | Facebook Ad n = 34 B | Database List n = 42 C |
| Ethnicity | Hispanic/Latino | 10.8% | 11.1% | 13.4% | 4.1% |
| | Not Hispanic/Latino | 87.5% | 87.6% | 86.6% | 86.4% |
| Race | White/Caucasian | 75.8% | 75.9% | 89.2% C | 64.7% |
| | Asian | 7.6% | 7.8% | .0% | 9.3% |
| | Black/African American | 7.0% | 7.4% | 4.2% | 2.2% |
| | Bi-racial/Multi-racial | 3.2% | 3.1% | 1.7% | 5.9% |
| | Native American | 1.3% | 1.3% | .0% | 2.2% |
| Presence of Children | Yes | 30.6% | 31.2% | 22.8% | 26.4% |
| | No | 69.0% | 68.3% | 77.2% | 73.6% |
| Education | Less than high school | 6.4% | 5.8% | 13.2% | 9.8% |
| | Graduated high school | 9.2% | 9.3% C | 18.5% C | 1.5% |
| | Technical/Vocational | 6.9% | 7.4% | 2.9% | 3.1% |
| | Some college | 23.3% | 23.7% | 21.7% | 19.5% |
| | Graduated college | 35.9% | 36.6% | 22.2% | 34.0% |
| | Graduate/Professional/Masters/PhD/MBA | 18.3% | 17.2% | 21.5% | 32.1% A |
| LGBTQ | Yes | 10.5% | 9.8% | 9.6% | 22.4% A |
| | No | 86.4% | 87.4% | 77.2% | 76.2% |

Only responses mentioned by 1.0% of total respondents or more are shown.



APPENDIX



Main Reason for Visiting (by Visitor Status)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Recent Visitors n = 332 A | Lapsed Visitors n = 240 B |
|---|---|---------------------------------|---------------------------------|
| I was visiting friends or relatives | 18.6% | 19.8% | 16.6% |
| I just wanted to see what the area had to offer | 18.0% | 14.9% | 22.7% A |
| It had a variety of things to see and do | 15.1% | 15.8% | 13.9% |
| I had business in the area | 12.5% | 13.6% | 10.6% |
| A friend or relative recommended it | 6.8% | 6.3% | 7.5% |
| It was a good value for the money spent | 5.2% | 6.3% | 3.5% |
| Other single mentions | 4.1% | 3.5% | 4.9% |
| I was visiting children enrolled in college in the area | 2.6% | 3.5% | 1.2% |
| I was going on a vacation/getaway | 2.6% | 2.0% | 3.6% |
| I was attending a wedding | 2.3% | 2.5% | 1.9% |
| I wanted to see Lake Tahoe | 2.0% | 1.6% | 2.7% |
| I was traveling through the Reno Tahoe area | 2.0% | 1.1% | 3.4% A |
| I was attending a concert | 1.0% | 1.1% | .9% |

Only responses mentioned by 1.0% of total respondents or more are shown.

While the top reasons for visiting remain consistent for both recent and lapsed visitors, lapsed visitors are more likely to say they just wanted to see what the area had to offer or that they were traveling through the Reno Tahoe area, as compared to recent visitors.



Activities on Recent Trip (by Visitor Status)

| | Total Reno Tahoe Visitors from Las Vegas n = 572 | Recent Visitors n = 332 A | Lapsed Visitors n = 240 B |
|--|---|---------------------------------|---------------------------------|
| NET: Outdoor activities | 45.8% | 47.1% | 43.7% |
| Gamble | 38.7% | 39.5% | 37.5% |
| Shop | 37.9% | 43.7% B | 28.9% |
| Visit friends or relatives | 28.9% | 34.1% B | 20.9% |
| Nightlife | 19.1% | 22.8% B | 13.4% |
| Arts and culture | 16.2% | 20.2% B | 10.0% |
| Attend a special event | 12.8% | 14.4% | 10.4% |
| Conduct business | 10.6% | 13.4% B | 6.3% |
| Go to a spa | 9.5% | 12.9% B | 4.2% |
| Tour a brewery, distillery, or dispensary | 7.9% | 12.8% B | .4% |
| Go to a wedding or other family/friend's event | 7.1% | 7.8% | 6.1% |
| Attend a convention/trade show or seminar | 4.2% | 5.3% | 2.6% |
| Go on a honeymoon | 2.9% | 3.8% | 1.5% |
| Visit restaurants | 1.0% | .9% | 1.3% |

Only responses mentioned by 1.0% of total respondents or more are shown.

While outdoor activities, gambling, and shopping remain the top activities for both recent and lapsed visitors, recent visitors are more likely to have shopped, visited friends or relatives, participated in nightlife activities, participated in arts or culture activities, conducted business, gone to a spa, or toured a brewery, distillery, or dispensary.