

**Reno  
Tahoe**

# PAST & POTENTIAL VISITOR PROFILE REPORT

**2022**

Destination  Analysts





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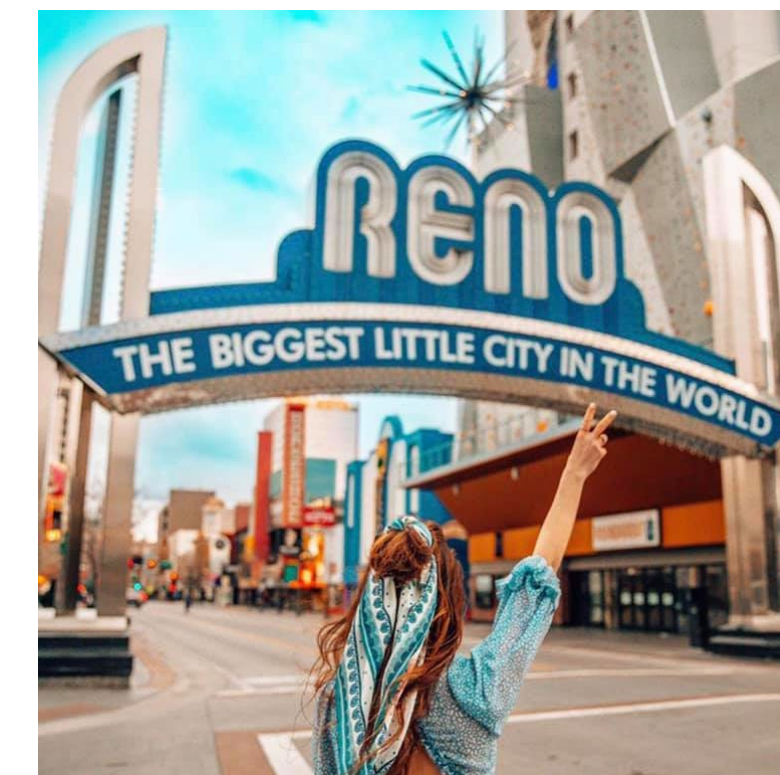
# Research Overview & Methodology

This report presents the findings of a Past and Potential Visitor Study conducted by Destination Analysts on behalf of Reno Tahoe.

The goal of the project was to understand:

- Detailed trip characteristics, including reasons for visiting Reno Tahoe, length of stay, and lodging type
- Activities & attractions visited in Reno Tahoe
- Evaluation of Reno Tahoe's destination attributes
- Detailed Reno Tahoe visitor spending estimates
- Travel planning resources used by Reno Tahoe visitors
- Visitor satisfaction
- Visitor demographics

An online survey using a nationally representative online panel targeted both past and potential Reno Tahoe visitors, ages 21 and older. The sample included 400 past 12-month Reno Tahoe visitors and 800 potential visitors (including lapsed and never visited). The data was collected between July-August 2022 and was weighted to the national population.





# Report Definitions

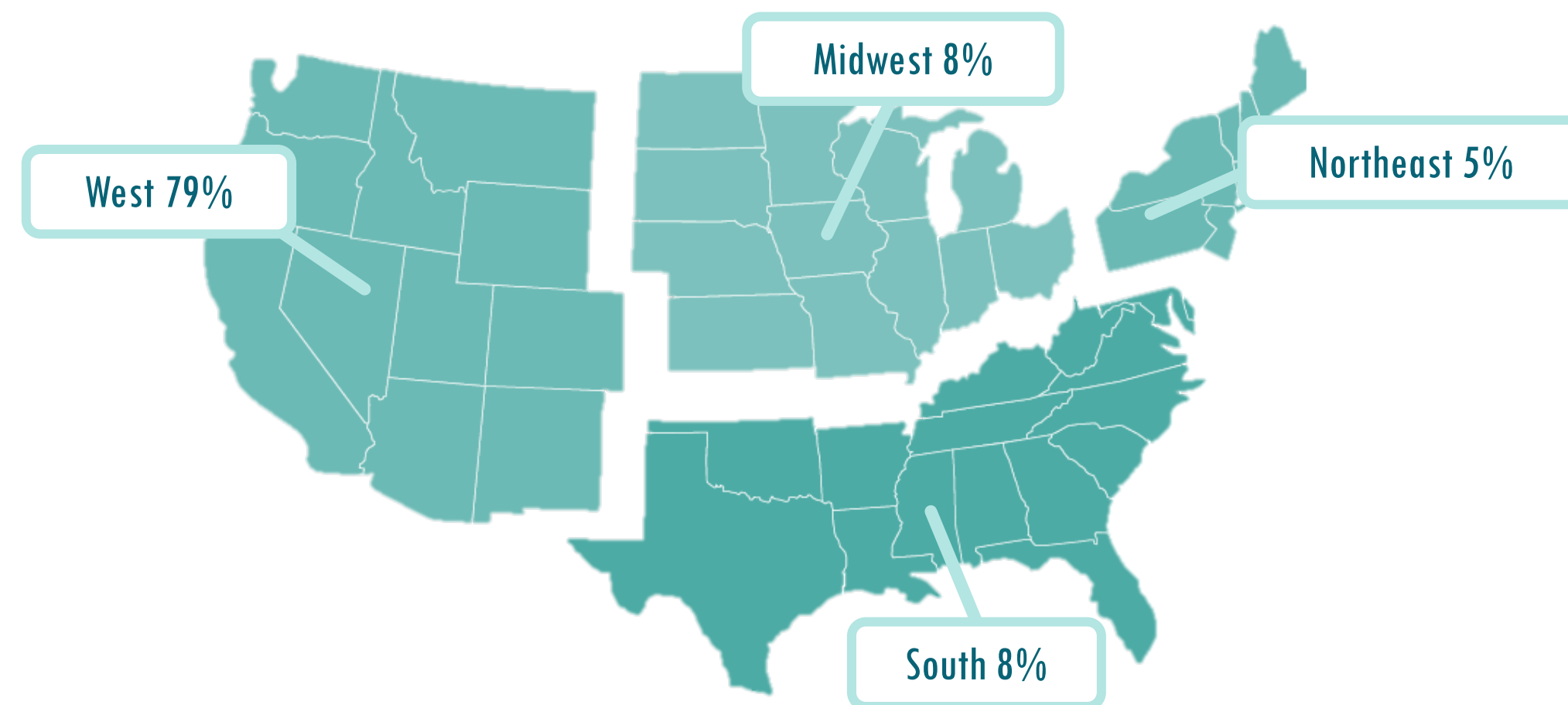
- **Total Audience** – the total sample of past and potential Reno Tahoe visitors
- **Past Visitors/Recent Visitors** – those who visited Reno Tahoe in the past 12 months, including day and overnight trips
- **Leisure Visitor** – those who visited Reno Tahoe for leisure in the past 12 months
- **VFR Visitor** – those who visited Reno Tahoe to see friends/relatives in the past 12 months
- **Lapsed Visitor** – those who have visited Reno Tahoe as an adult, but have not been in the last 12 months
- **Travel Intender** – those who are interested in visiting Reno Tahoe in the next 12 months, but have not been in the last 12 months
- **Never Visited** – those who have never visited Reno Tahoe as an adult
- **Western U.S.** – residents who reside in states west of the Rockies, including Alaska, Arizona, California, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming
- **Eastern U.S.** – residents who reside in states east of the Rockies and not listed above
- **Primary Audience** – Reno Tahoe’s target audience; psychographics include at least one active, ambitious, and progressive statement; interests include at least one outdoor activity
- **Digital Junkie** – Reno Tahoe’s audience segment, including those who watch online content, listen to streaming audio, and use social media daily
- **Intellectual Junkie** – Reno Tahoe’s audience segment, including preferences for new experiences, cultures, sustainability, and minority-owned businesses; must have college degree or higher
- **Mindful Mom** – Reno Tahoe’s audience segment, including females with children under 18 who travel to build stronger connections with family
- **Adrenaline Junkie** – Reno Tahoe’s audience segment, including preferences for being outside, being active, and exciting experiences; must be interested in at least one outdoor adventure activity
- **Gen Z/Millennial/Gen X/Boomer** – Gen Z 18-25 years old; Millennial 26-41 years old; Gen X 42-57 years old; Boomer 58+ years old

# EXECUTIVE SUMMARY

# Executive Summary

## Origin Markets

The majority of Reno Tahoe's past 12-month visitors arrived from the Western U.S. (79%), while less than one in ten came from the South (8%), Midwest (8%), or Northeast (5%). The top source state was California (54%), followed distantly by Nevada (8%), Oregon (4%), Washington (3%), and Arizona (3%). Within the major source metros, nearly one in five visitors arrived from the Bay Area, including San Francisco-Oakland (11%) and San Jose (5%). One in ten visitors came from Sacramento (11%).



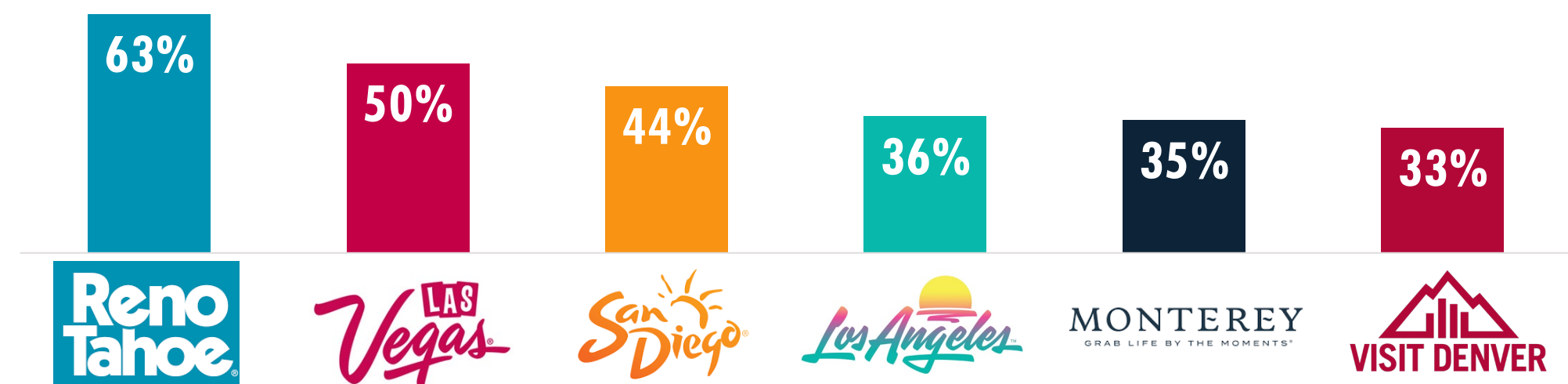
**MAJORITY OF RECENT VISITORS LIVE IN CALIFORNIA, NEVADA, & OREGON**

## Past and Planned Travel

On average, past 12-month visitors to Reno Tahoe took 3.9 overnight leisure trips at least 50 miles away from home in the past year. Nearly two-thirds of past visitors took three or more trips (63%). Among the areas visited outside of Reno Tahoe, the top destinations included Las Vegas (42%), Los Angeles (27%), San Diego (25%), Denver (23%), and/or Salt Lake City (22%).

When asked where they are interested in visiting overnight for leisure in the next 12 months, 63 percent of past 12-month Reno Tahoe visitors say they are interested in returning to the area, higher than any other competitor destination. This is followed by Las Vegas (50%), San Diego (44%), Los Angeles (36%), Monterey (35%), and Denver (33%).

**TWO-THIRDS OF RECENT VISITORS ARE INTERESTED IN RETURNING TO RENO TAHOE**



When asked where they plan to visit overnight for leisure in the next six months, recent Reno Tahoe visitors most often cite Las Vegas (31%), followed closely by Reno Tahoe (28%). A further 18 percent plan to visit San Diego in the next six months, in addition to Los Angeles (17%) and Denver (14%).



# Executive Summary

## Past 12 Month Reno Travel

On average, recent visitors to Reno Tahoe have taken 8.0 overnight trips and 2.9 day trips to the area as an adult. In the past 12 months, recent visitors took 1.2 overnight trips to Reno Tahoe and 0.7 day trips. These recent visitors stayed 4.2 days on average in the destination and 2.7 nights.

Two thirds of past 12-month visitors to Reno Tahoe cited leisure as their primary purpose of visit (66%), followed distantly by visiting friends/family (20%). Of those who stayed overnight, the most common accommodation type were gaming/casino hotels (53%). Less than one quarter of recent overnight visitors stayed in a non-gaming hotel (21%), vacation rental (16%), or private home of their friends/family (16%).

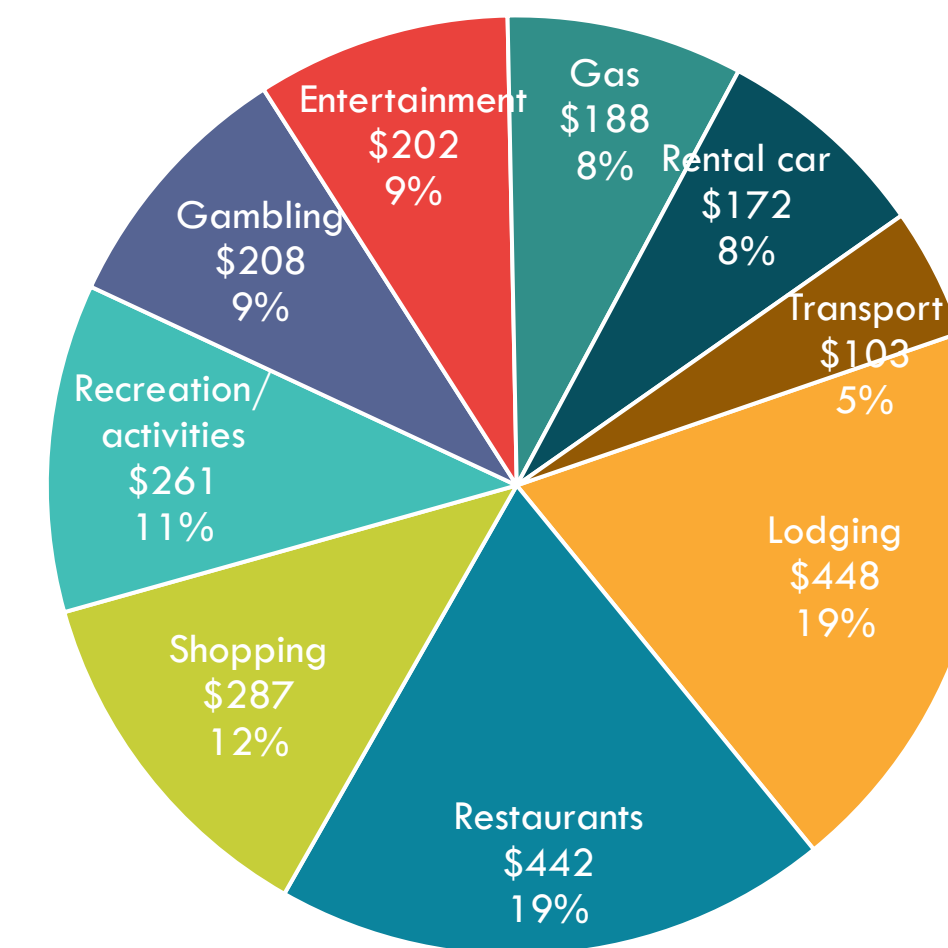
In terms of travel party, nearly half of recent visitors traveled as a pair (46%), while over one third traveled in a group of three or more (37%). On average, past 12-month visitors traveled in groups of 2.7 persons. Six in ten brought their spouse/partner on their most recent Reno Tahoe trip (60%), while 14 percent traveled with other relatives, 15 percent with friends, and 12 percent with children under 18. One in ten brought along their pet (9%).

More than half of these recent visitors arrived to the Reno Tahoe area by plane (52%), while one third arrived by personal car (38%). In-destination, four in ten visitors used a rental car (44%) or their own personal car (42%). Just one in ten used rideshare (11%).

More than half of recent visitors went to the downtown Reno area (57%), followed closely by Incline Village in Lake Tahoe (50%). Around one in three visited the Lake Tahoe Sand Harbor area (38%) and/or

Reno Midtown district (30%), while one quarter went to Reno's Riverwalk district (28%).

On average, past 12-month visitors to Reno Tahoe spent \$239 per person per day in-destination. When accounting for average length of stay and party size, the average per party per trip spend is estimated to be \$2,313. Lodging/accommodations and restaurants/dining each contributed 19 percent share of wallet, while shopping accounted for 12 percent of spend, and recreation/activities 11 percent. Recent visitors spent less than ten percent of their average trip party spend on gambling and entertainment (9% each).



**LODGING & DINING MAKE UP 40% OF RENO TAHOE TRIP SPEND**

**\$2,313**  
per party per trip

# Executive Summary

## Past 12 Month Reno Travel Continued

On their last trip to the area, seven in ten recent Reno Tahoe visitors went to Lake Tahoe (70%), while just over half gambled (54%) and/or went shopping (51%). A further 29 percent went to a bar/nightclub, while 28 percent went hiking, and 21 percent visited a microbrewery. Among those who participated in activities, Lake Tahoe was the leading travel motivator for visiting the region (25%), followed by gambling (18%).

When asked about their overall satisfaction with their last trip, 88 percent of recent Reno Tahoe visitors were very/extremely satisfied. Although still extremely high, satisfaction with quality of accommodations (86%), hospitality and service (83%), and interactions with locals (79%) fell slightly behind total trip satisfaction levels.

More than eight in ten of these recent visitors are very/extremely likely to return to Reno Tahoe in the future (83%), while 79 percent would recommend the region as a place to visit to their friends and family.

Despite high overall satisfaction levels, over four in ten had a negative experience on their last trip to Reno Tahoe (45%). The top issues included traffic (28%), unclean/dirty environment (16%), panhandling (15%), and interactions with the homeless population (11%).

**NEARLY ALL RECENT VISITORS WERE SATISFIED WITH THEIR LAST TRIP TO RENO TAHOE**



**88%**  
satisfied



**79%**  
recommend



**83%**  
return



# Executive Summary

## Travel Mindset

Nearly all past 12-month Reno Tahoe visitors (86%) say they enjoy trying new things, such as food, experiences, and activities. More than three quarters prefer experiences where they can really get a sense for the essence of a place (81%), seek out stimulating and exciting experiences when they travel (78%), and/or travel to open their mind to new cultures and experiences (76%). Seven in ten say that being outside and connecting with nature motivates them to travel (71%).

When asked what motivates them to take a vacation, 91 percent of recent visitors to Reno Tahoe say they travel to take a break from everyday life. Eight in ten travel to explore and do new things (86%), to live life to its fullest (81%), and/or to treat themselves (81%). Three quarters travel to try/learn new things (77%), to be outdoors and experience nature (77%), and/or to feel alive and energetic (77%).

## Destination Perceptions

When selecting a vacation destination, recent Reno Tahoe visitors prioritize good value for money (74%), an inclusive/welcoming atmosphere (71%), unique local cuisine (62%), water access (61%), easy accessibility by car/plane (59%), and/or outdoor activities/recreation (59%).

As a destination, Reno Tahoe ranks first among its competitive set for good value for money, an inclusive/welcoming atmosphere, and outdoor activities/recreation. Reno Tahoe ranks second for water access, just behind San Diego. Finally, among the attributes of most importance, Reno Tahoe ranks near last for unique local cuisine (ahead of Salt Lake City) and easy access (ahead of Monterey).

When considering what attributes are important to travelers when selecting a destination and Reno Tahoe's rating, there are three key attributes that emerge as an opportunity. That is, where importance is

high but Reno Tahoe's rating is low. These include unique local cuisine, easy access, and variety of museums and galleries. Six key attributes fall into Reno Tahoe's strength category, where importance is high and Reno Tahoe's rating is also high. These include good value, inclusive/welcoming, water access, outdoor activities, variety of special events/festivals, and family-friendly environment. Many key attributes are categorized as 'maintain', where Reno Tahoe's rating is again high, but importance when selecting a destination is low. These include water activities, eco-adventures, nightlife, fine dining, winter sports, gambling/casinos, spas, golf, and a variety of short-term rentals.

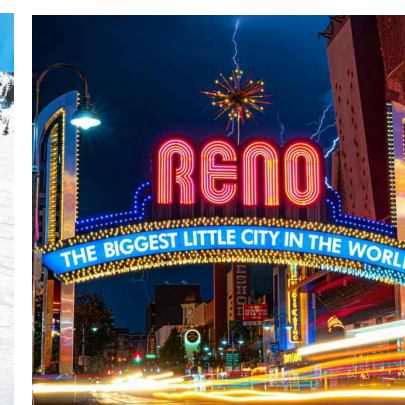
Taking importance out of the equation, Reno Tahoe owns five of the top ten attributes associated with the destination. That is, Reno Tahoe ranks higher than any competitor on these attributes, including winter sports, outdoor activities, inclusive/welcoming, good value, and variety of short-term rentals. Las Vegas pulls ahead for casinos and fine dining, while San Diego ranks first for water access, water activities, and family-friendliness.

**VISITORS ASSOCIATE RENO TAHOE WITH OUTDOOR ACTIVITIES, GAMBLING, & AN INCLUSIVE ATMOSPHERE**

**Winter Sports**  
63%



**Gambling**  
62%



**Outdoor Rec**  
59%



**Water Access**  
57%



**Inclusive & Welcoming**  
52%





# Executive Summary

## Reno Tahoe Travel Barriers

For those who are not considering another trip to Reno Tahoe in the next 12 months, the top travel barriers include having been before and wishing to try somewhere new (29%), Reno not being currently on their radar (23%), having been recently and wishing to try somewhere new (23%), and/or better value at other destinations (20%).

For recent visitors who are interested in returning to Reno in the next 12 months but not planning to visit in the next six months, the top travel barriers include wishing to go somewhere new (28%), the cost of gas being too high (23%), and/or airfares being too expensive (19%).

## Travel Planning and Media Consumption

Two thirds of past 12-month visitors to Reno Tahoe use social media at least once a day (67%), while just over half watch traditional cable TV daily (58%). Four in ten watch online content (42%), subscription services (40%), read news articles (39%), and/or watch streaming TV (38%) daily. Streaming audio and lifestyle magazines are the least utilized media sources, with 24 percent of past visitors never accessing either channel.

In terms of social media channels used, 90 percent of past year Reno Tahoe visitors access Facebook, followed by YouTube (73%), Instagram (57%), and Twitter (43%). Just three in ten use TikTok (30%).

When looking for travel inspiration, the top sources include online search (55%), word of mouth via friends/family (50%), and/or travel review websites (44%). Four in ten rely on official destination websites for travel inspiration (40%).

## Marketing Recall

Less than one in five past 12-month Reno Tahoe visitors recall seeing an ad for the destination (17%), behind Las Vegas (40%), San Diego (24%), and Los Angeles (17%). Nearly one third, however, have visited the Reno Tahoe website in the past year (29%), just behind Las Vegas (34%), and ahead of Monterey (24%), Los Angeles (22%), and San Diego (21%). One in five recent visitors have also accessed Reno Tahoe's social media channels, again behind Las Vegas (25%), but ahead of all other competitors.

FACEBOOK, YOUTUBE, & INSTAGRAM ARE THE MOST USED SOCIAL PLATFORMS

1ST



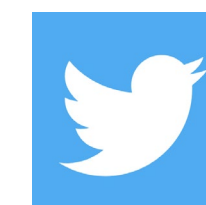
2ND



3RD



4TH





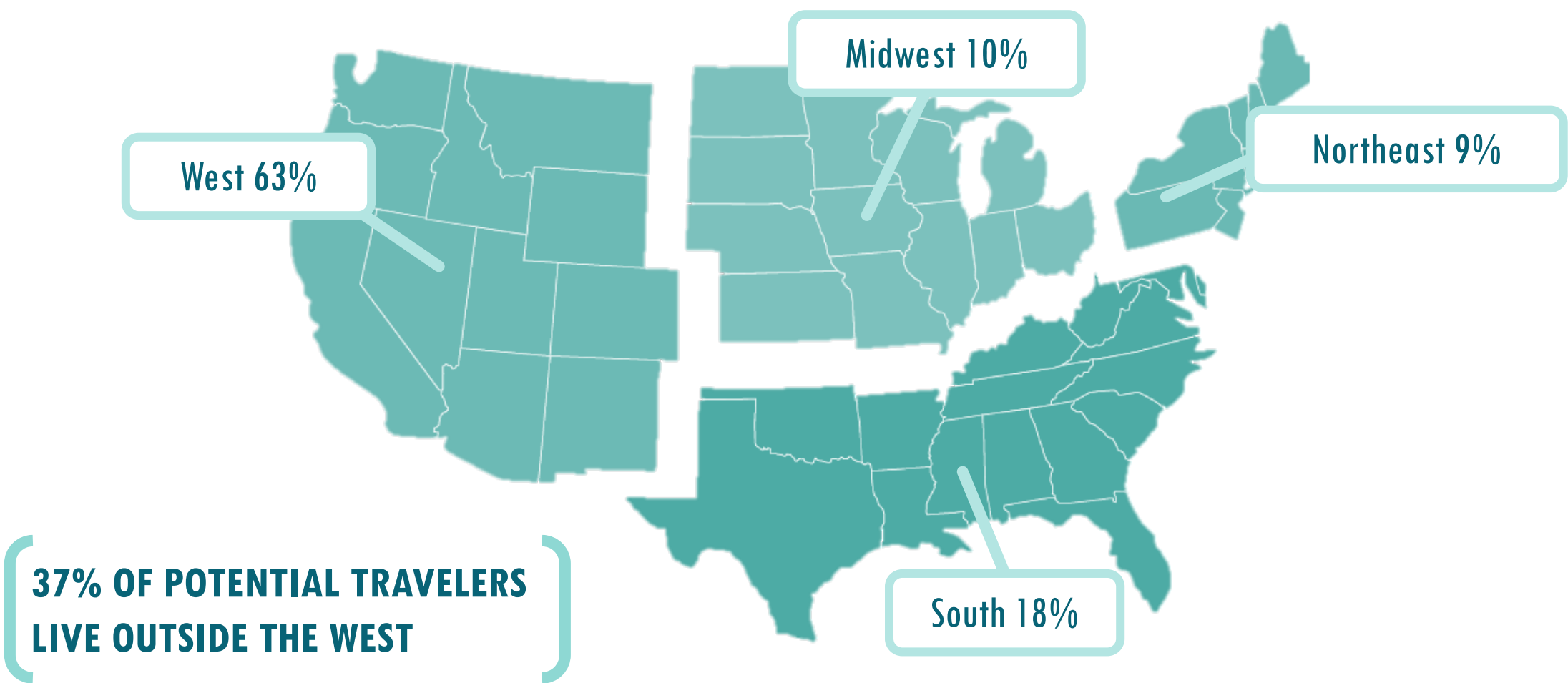
# Executive Summary

## Origin Markets

Two thirds of potential Reno Tahoe visitors reside in the Western U.S. (63%), while 18 percent live in the South, 10 percent in the Midwest, and nine percent in the Northeast. Next 12-month Travel Intenders have a higher residency rate in the Western U.S. (72%).

The top source states for potential travelers include California (28%), Arizona (8%), Washington (5%), Colorado (5%), and Oregon (5%). Travel Intenders are much more likely to live in California (36%), followed by Washington (7%), Colorado (6%), and Oregon (6%).

In terms of origin markets, potential travelers are most likely to reside in Los Angeles-Long Beach (8%), Phoenix-Mesa (6%), or San Francisco-Oakland (5%). Travel Intenders are most likely to live in Los Angeles (9%), followed by San Francisco-Oakland (7%), San Jose (6%), and Phoenix-Mesa (5%).

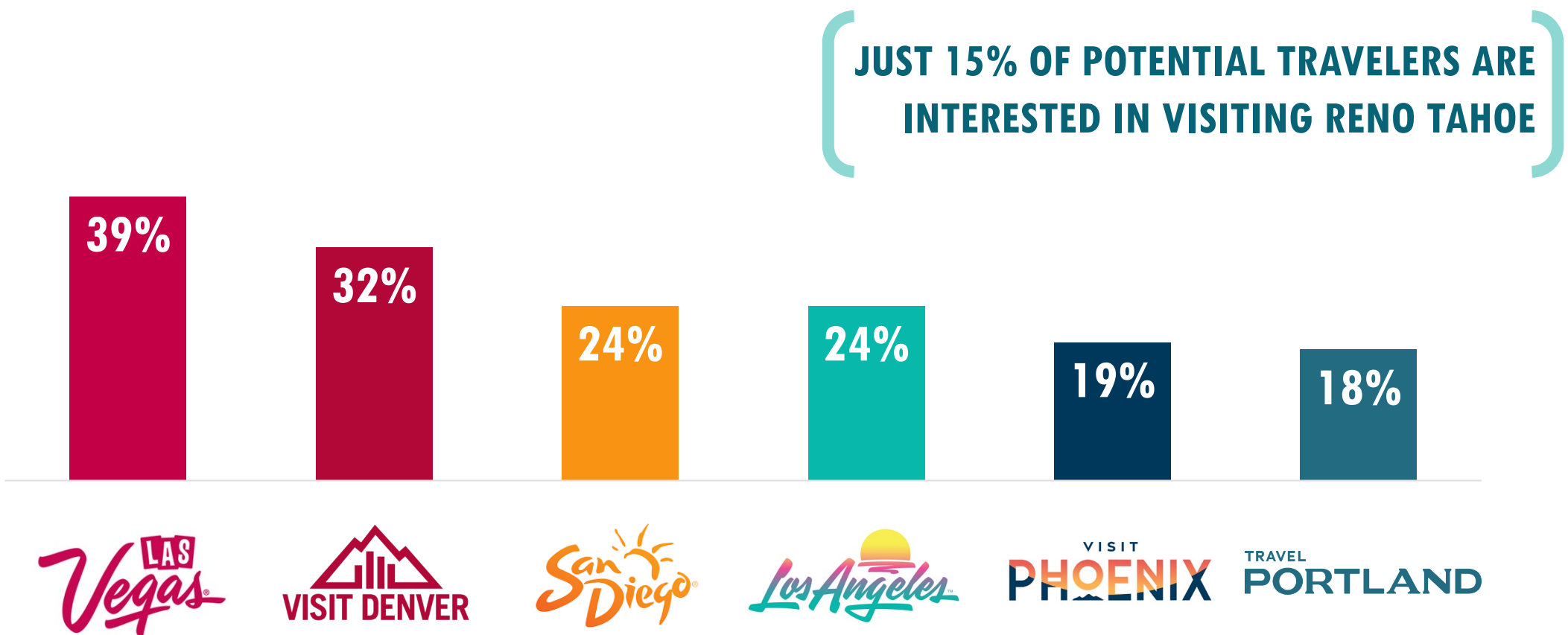


## Past and Planned Travel

On average, potential visitors to Reno Tahoe took 2.7 overnight leisure trips at least 50 miles away from home in the past year. Just over half took one to two trips (52%).

The top destinations potential travelers have visited in the past 12 months include Las Vegas (16%), Los Angeles (11%), and San Diego (9%). For those interested in visiting Reno Tahoe in the next year, past 12-month travel rates to competitors were higher, including 23 percent who visited Las Vegas, 16 percent Las Angeles, 15 percent San Diego, and 13 percent Denver.

When asked where they are interested in visiting overnight for leisure in the next 12 months, 39 percent of potential Reno Tahoe visitors say they are interested in Las Vegas (39%), Denver (32%), San Diego (24%), and/or Los Angeles (24%). Just 15 percent are interested in visiting Reno Tahoe in the next year, ahead of Salt Lake City, Monterey, and Anaheim.





# Executive Summary

## Past and Planned Travel Continued

When asked where they plan to visit overnight for leisure in the next six months, potential Reno Tahoe visitors most often cite Las Vegas (18%), Denver (9%), and Los Angeles (7%). Just two percent plan to visit Reno Tahoe in the next six months. This percentage is much higher among those already interested in visiting Reno in the next year (15%).

## Past Reno Travel

On average, lapsed visitors to Reno Tahoe have taken 3.3 overnight trips and 1.6 day trips to the area as an adult. These averages are slightly higher among those interested in visiting in the next 12 months, at 4.4 lifetime overnight trips and 2.4 lifetime day trips.

Nearly three quarters of lapsed visitors last trip to Reno Tahoe was more than five years ago (73%), while just over one in ten visited in the past three to four years (14%) or one to two years (13%).

## Destination Perceptions

When selecting a vacation destination, potential Reno Tahoe visitors prioritize good value for money (78%), an inclusive/welcoming atmosphere (66%), easy accessibility by car/plane (53%), water access (52%), and/or unique local cuisine (51%). Those who are already interested in visiting Reno Tahoe in the next year are even more likely to prioritize destinations with good value (88%), an inclusive atmosphere (80%), unique cuisine (75%), and easy access (72%).

As a destination, Reno Tahoe ranks in the middle of its competitive set in terms of the most important destination attributes. Reno Tahoe places third for good value, behind Las Vegas and Phoenix. Nearly all competitor destinations pull ahead for having a welcoming/inclusive atmosphere, except Phoenix. Similarly, all competitors rank higher for easy access, except Monterey. Reno places in the middle of its competitive set for water access, behind San Diego, Los Angeles, and Monterey. Finally, Reno ranks last for unique local cuisine among its competitive set.

GAMBLING & LAKE TAHOE ARE TOP OF MIND  
AMONG POTENTIAL TRAVELERS





# Executive Summary

## Destination Perceptions Continued

Taking importance out of the equation, Reno Tahoe does not own any of the top ten attributes associated with the destination among potential travelers. Salt Lake City pulls ahead for outdoor activities and winter sports, while San Diego ranks fist for water activities, Phoenix for golf, and Los Angeles/Las Vegas tie for short term vacation rentals. Las Vegas owns Reno Tahoe’s remaining top five attributes, including casinos/gambling, spas, fine dining, nightlife scene, and inclusive/welcoming atmosphere.

When considering what attributes are important to travelers when selecting a destination and Reno Tahoe’s rating independent of competitors, there are six key attributes that emerge as an opportunity for attracting potential travelers. These include good value, easily accessible, unique local cuisine, variety of special events/festivals, boutique/artisan shopping, and variety of museums/galleries. Five key attributes fall into Reno Tahoe’s strength category, including inclusive/welcoming, water access, family friendly, fine dining, and outdoor activities/recreation.

## Travel Mindset

Three quarters of potential Reno Tahoe visitors (74%) say they enjoy trying new things, such as food, experiences, and activities. Two thirds prefer experiences where they can really get a sense for the essence of a place (66%) and/or travel to open their mind to new cultures and experiences (65%). Six in ten say that being outside and connecting with nature and/or building strong connection with family motivates them to travel (60% each). Those who are already interested in visiting Reno in the next year are much more likely to enjoy trying new things (86%), travel to open their mind to new cultures/experiences (84%), and/or prefer experiences where they can truly get a sense for a place (79%).

When asked what motivates them to take a vacation, 84 percent of potential visitors say they travel to take a break from everyday life, for rest/relaxation (79%), to treat themselves (78%), and/or to live life to its fullest (78%). Those who are already interested in visiting Reno Tahoe in the next year are much more likely to travel as an escape from life (96%) and to live life to its fullest (91%).

Outdoor Rec

42%

Winter Sports

41%

Gambling

39%

Water Access

32%

Short Term Rentals

32%



POTENTIAL TRAVELERS ALSO ASSOCIATE RENO TAHOE WITH OUTDOOR ACTIVITIES & GAMBLING, BUT AT LOWER LEVELS



# Executive Summary

## Marketing Recall

Just four percent of potential Reno Tahoe visitors recall seeing an ad for the destination, behind nearly every competitor and in line with Monterey. Those interested in visiting in the next 12 months, however, reported a higher recall rate at nine percent. One in ten potential visitors have been to the Reno Tahoe website in the past year (10%), behind Las Vegas (23%), San Diego (14%), and Los Angeles (13%). Those interested in visiting are much more likely to have been to the official website (28%). Seven percent of potential visitors have also accessed Reno Tahoe’s social media channels, behind all competitors. This percent holds steady among Travel Intenders (7%).

## Travel Planning and Media Consumption

Two thirds of potential Reno Tahoe travelers use social media at least once a day (63%), while over half watch traditional cable TV daily (53%). Four in ten read news articles (42%), watch online content (39%), and/or watch subscription services (38%). Streaming audio, streaming TV, and lifestyle magazines are the least utilized media sources, with nearly 30 percent of potential visitors never accessing these channels. Those interested in visiting Reno Tahoe in the next year are much more likely to use social media daily (75%).

## Travel Planning and Media Consumption

In terms of social media channels used, 89 percent of potential Reno Tahoe travelers access Facebook, followed by YouTube (70%), Instagram (50%), and Pinterest (35%). Travel Intenders have an even higher Facebook usage rate, at 92 percent. Travel Intenders are also more likely to use YouTube (79%).

FACEBOOK, YOUTUBE, INSTAGRAM, & PINTEREST ARE THE MOST USED SOCIAL PLATFORMS



When looking for travel inspiration, the top sources include word of mouth via friends/family (59%), online search (47%), and/or travel review websites (36%). Less than one third rely on official destination websites for travel inspiration (31%). Travel Intenders are slightly less likely to rely on word of mouth (54%), but more likely to use online search (51%), travel review sites (48%), and friends/family via social media (49%) for travel inspiration.

## Future Reno Travel

For potential visitors who are not considering a trip to Reno Tahoe in the next 12 months, the top travel barriers include Reno not being currently on their radar (45%), the cost of airfare (25%), and the cost of gas (25%). A further one fifth say there is better value at another destination (21%), traveling to Reno takes too long (20%), and/or there are not enough activities in Reno of interest (19%).

For potential visitors who are interested in visiting Reno Tahoe in the next 12 months but not planning to visit in the next six months, the top travel barriers include the cost of gas being too high (35%), Reno not being on their radar (33%), airfare is too expensive (31%), and concerns about COVID exposure while traveling (24%).

A full-page background image showing a mountain biker in mid-air, jumping over a tree trunk in a forest. The biker is wearing a helmet, a dark long-sleeved shirt, olive green cargo pants, and a large backpack. The bike is a full-suspension mountain bike. The background is a dense forest of evergreen trees.

# TRAVELER PROFILES



# RECENT VISITORS *Who they are*

## DEMOGRAPHICS



### Gender

Female: 46%  
Male: 54%



### Marital Status

Married/partnered: 68%  
Single: 21%



### Average Age: 53.2

Gen Z: 5%  
Millennials: 21%  
Gen Xers: 30%  
Boomers or older: 44%



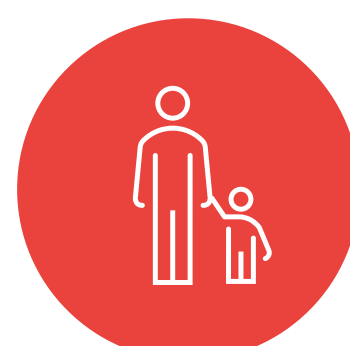
### Ethnicity

White/Caucasian: 86%  
Hispanic/Latino: 9%  
Asian/Pacific Islander: 6%  
Black/African American: 4%



### Household Income

\$94,337



### Children in Household

Under 18: 24%





# RECENT VISITORS

## Traveler Persona

### TOP TRAVEL MOTIVATORS

	Top 2 Box
To take a break from everyday life	91%
To explore and do new things	86%
To live life to its fullest	84%
To treat myself	81%
To experience other cultures	78%

### TRAVELER MINDSET

	Top 2 Box
I enjoy trying new things, such as foods, experiences, and activities	86%
I prefer experiences where I can really get a sense for the essence of a place	81%
I seek out exciting and stimulating experiences when I travel	78%
I travel to open my mind to new cultures and experiences	76%
Being outside and connecting with nature motivates me to travel	71%

### TOP TRAVEL INSPIRATION SOURCES



Online search 56%

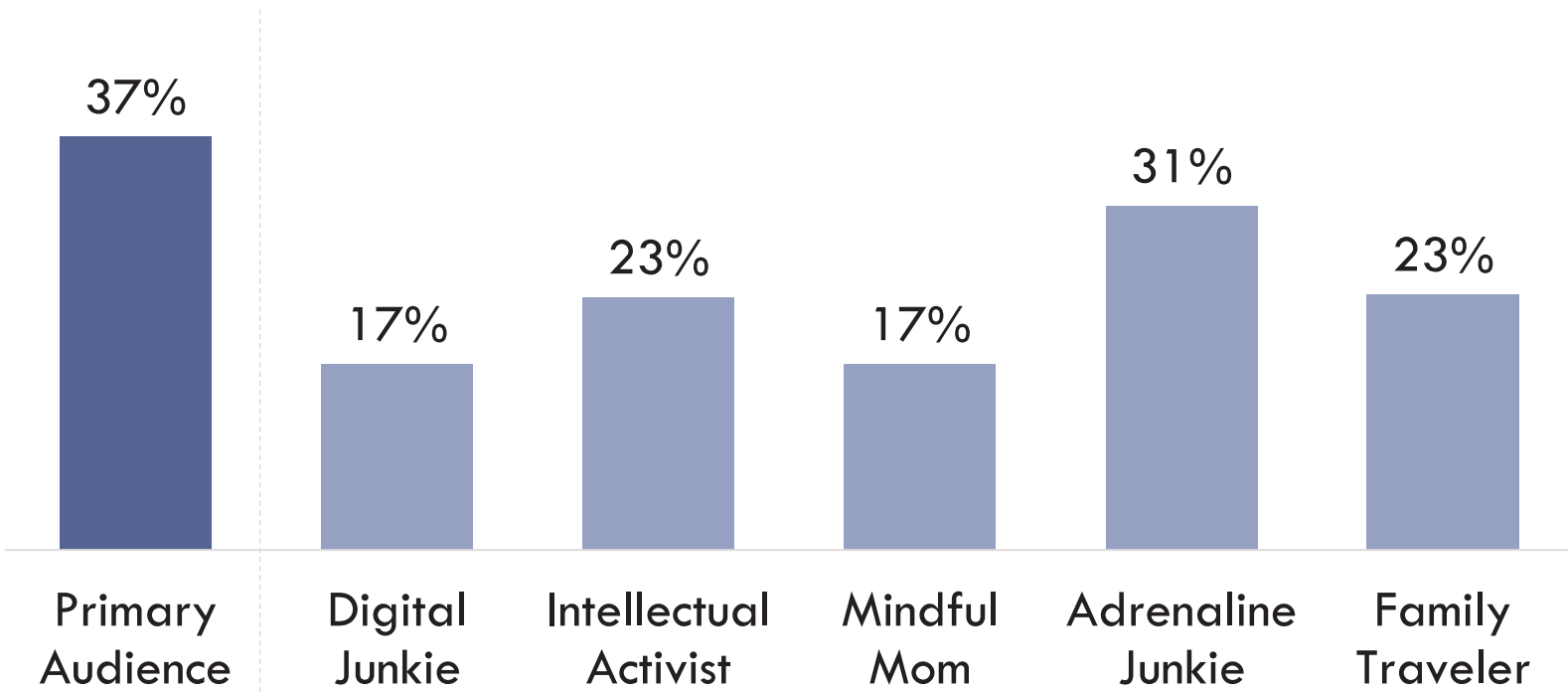


Friends/family direct contact 50%

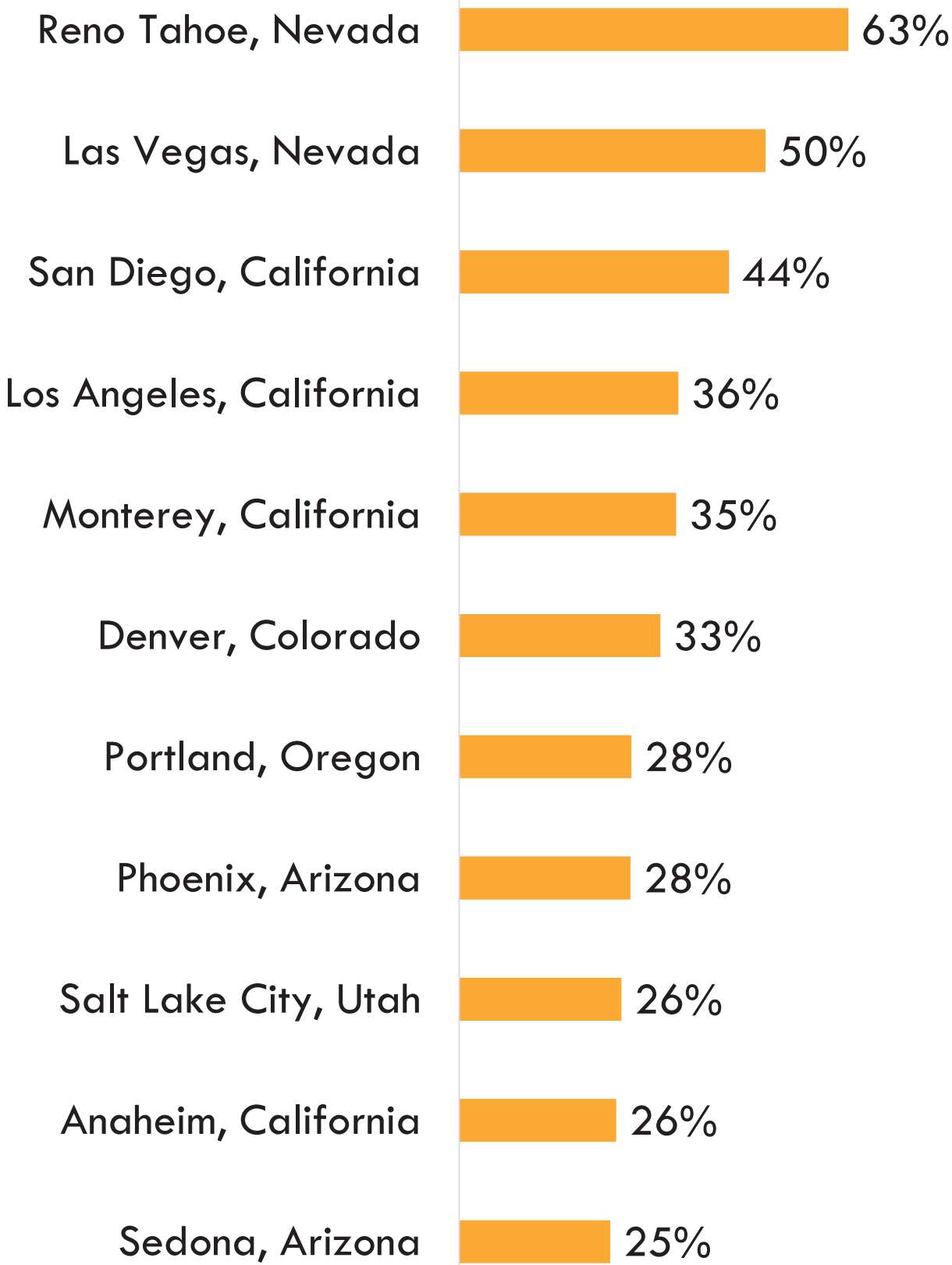


Travel review sites 44%

### TARGET AUDIENCE SEGMENTS



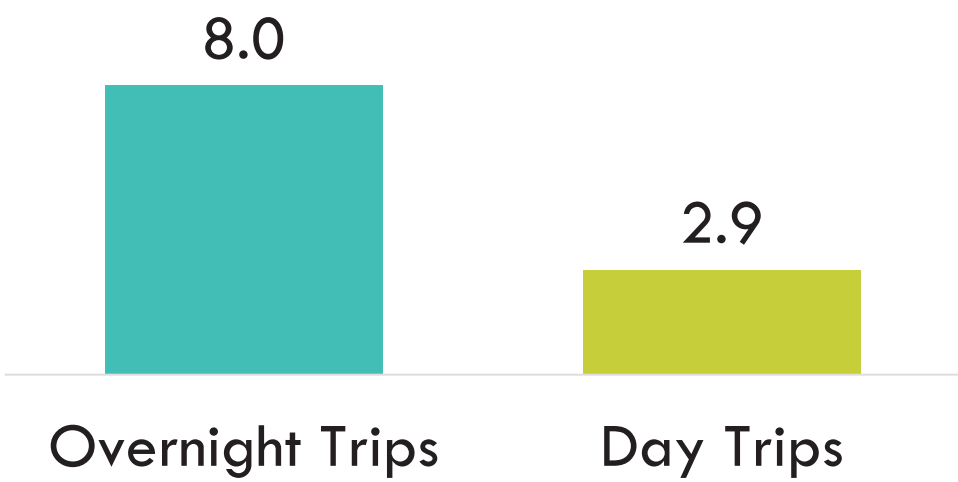
### INTERESTED VISITING NEXT 12 MONTHS



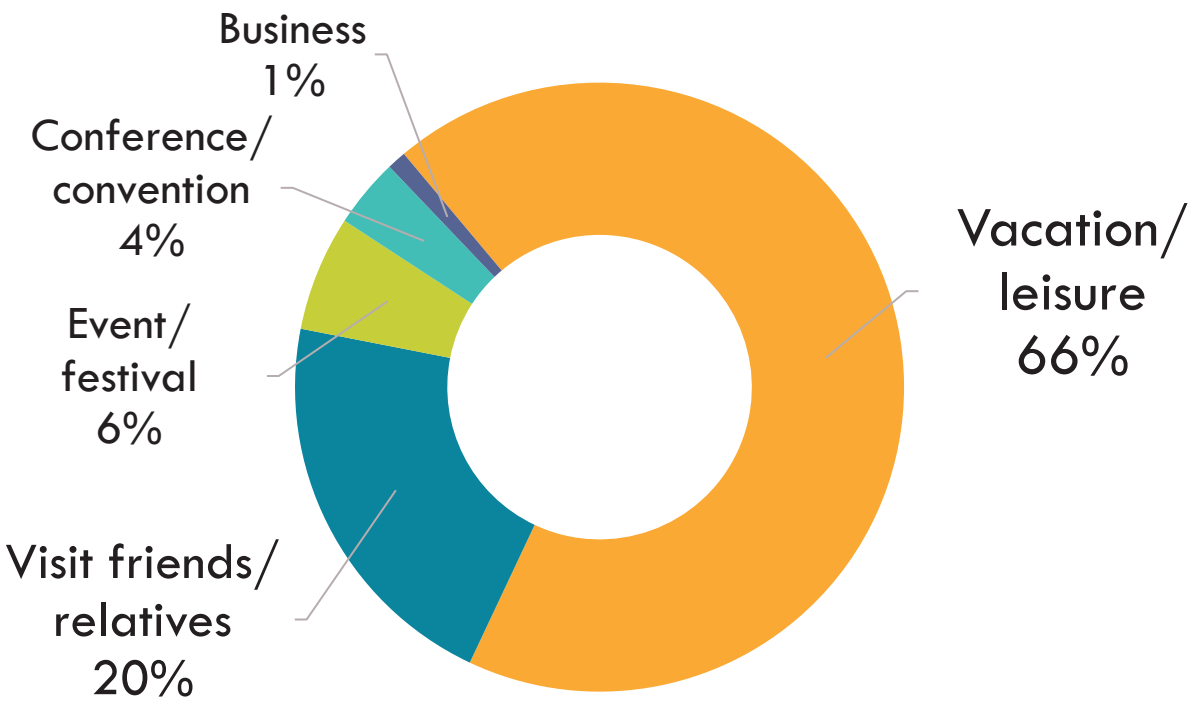


# RECENT VISITORS *Reno Tahoe Travel*

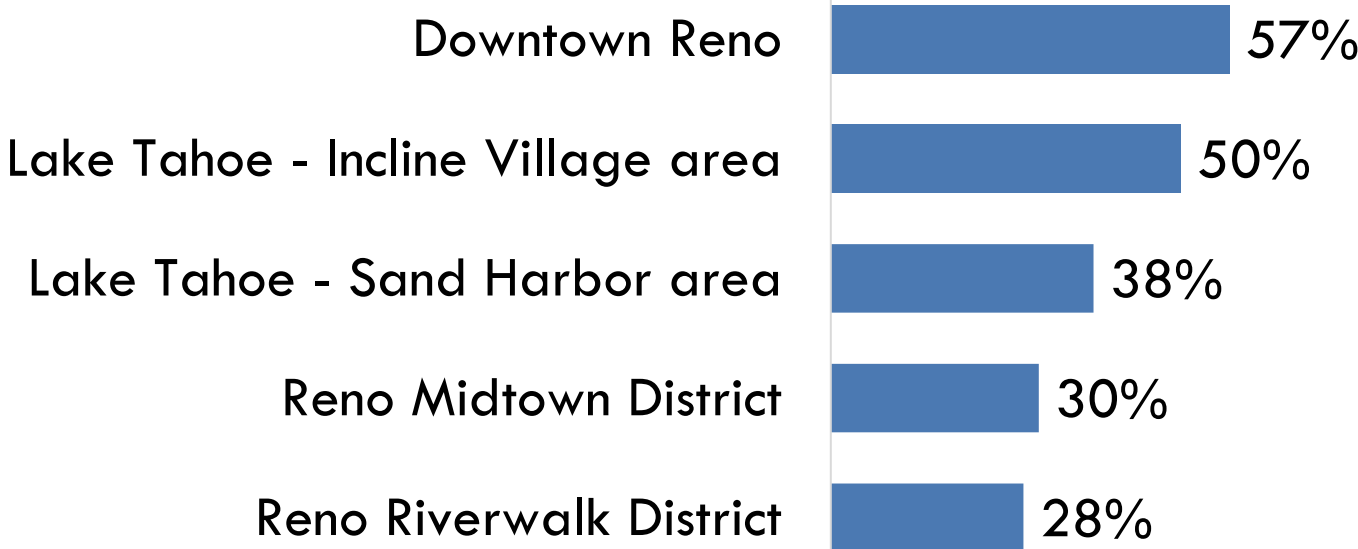
## LIFETIME RENO VISTS



## PRIMARY PURPOSE OF RENO TRIP



## RENO AREAS VISITED



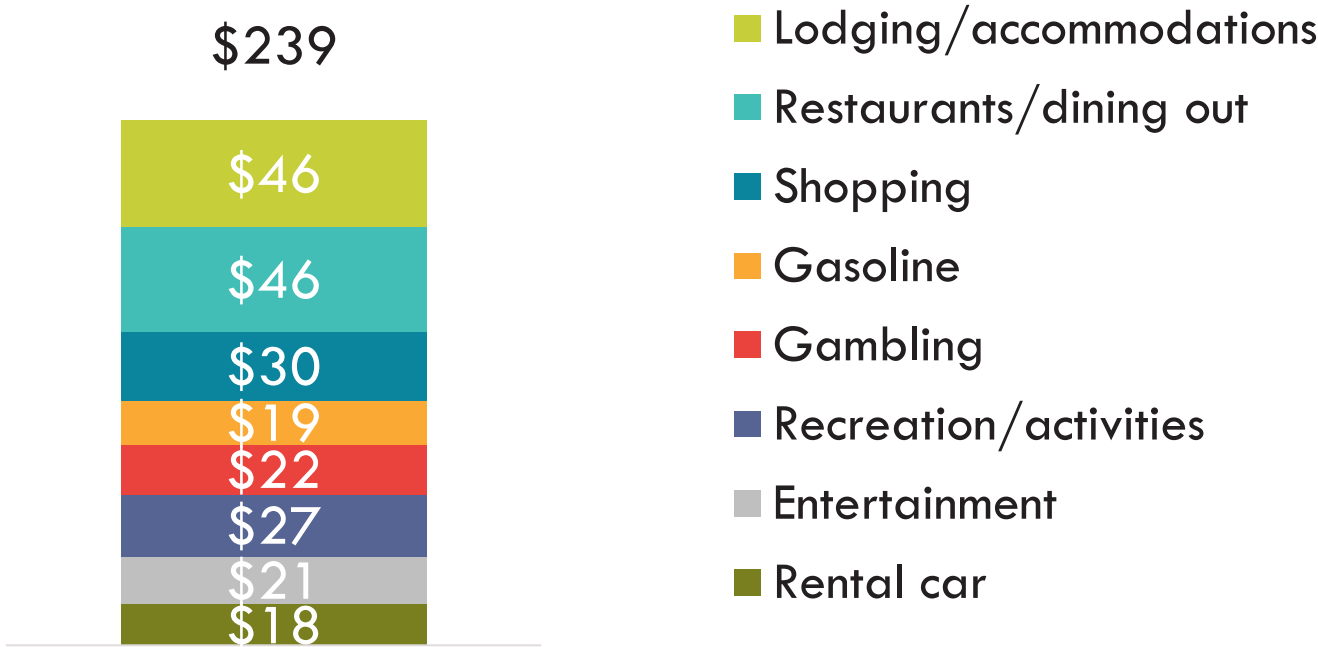
## TOP ACCOMMODATION TYPES



## TOP RENO ACTIVITIES

Visited Lake Tahoe	70%
Gambling/gaming	54%
Went shopping	51%
Went to a bar/nightclub	29%
Went hiking	28%

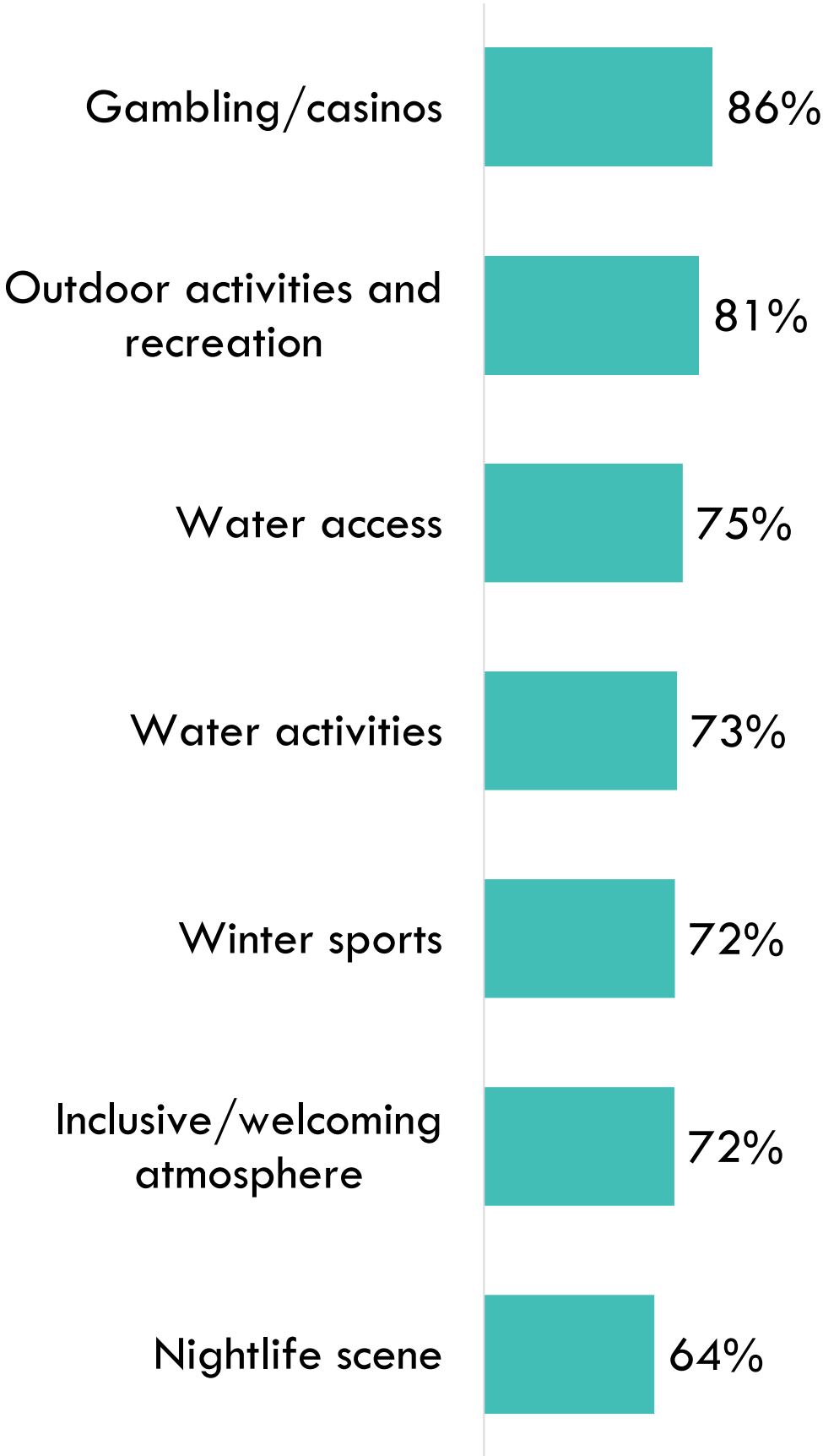
## AVERAGE DAILY SPEND PER PERSON



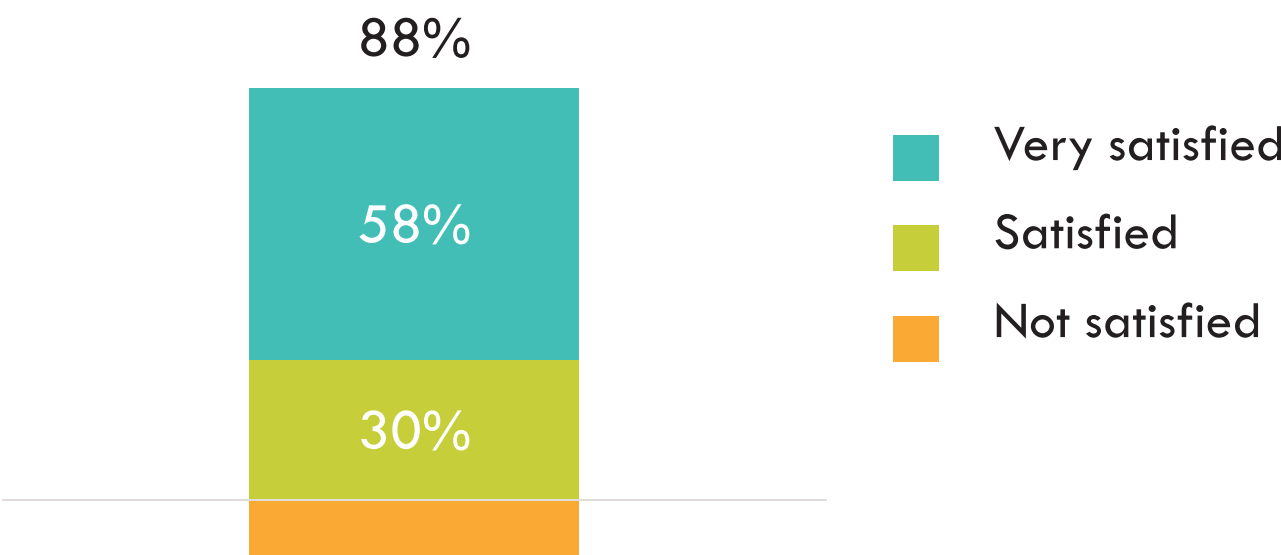


# RECENT VISITORS *Reno Tahoe Perceptions*

## RENO TOP ATTRIBUTES



## RENO SATISFACTION RATING



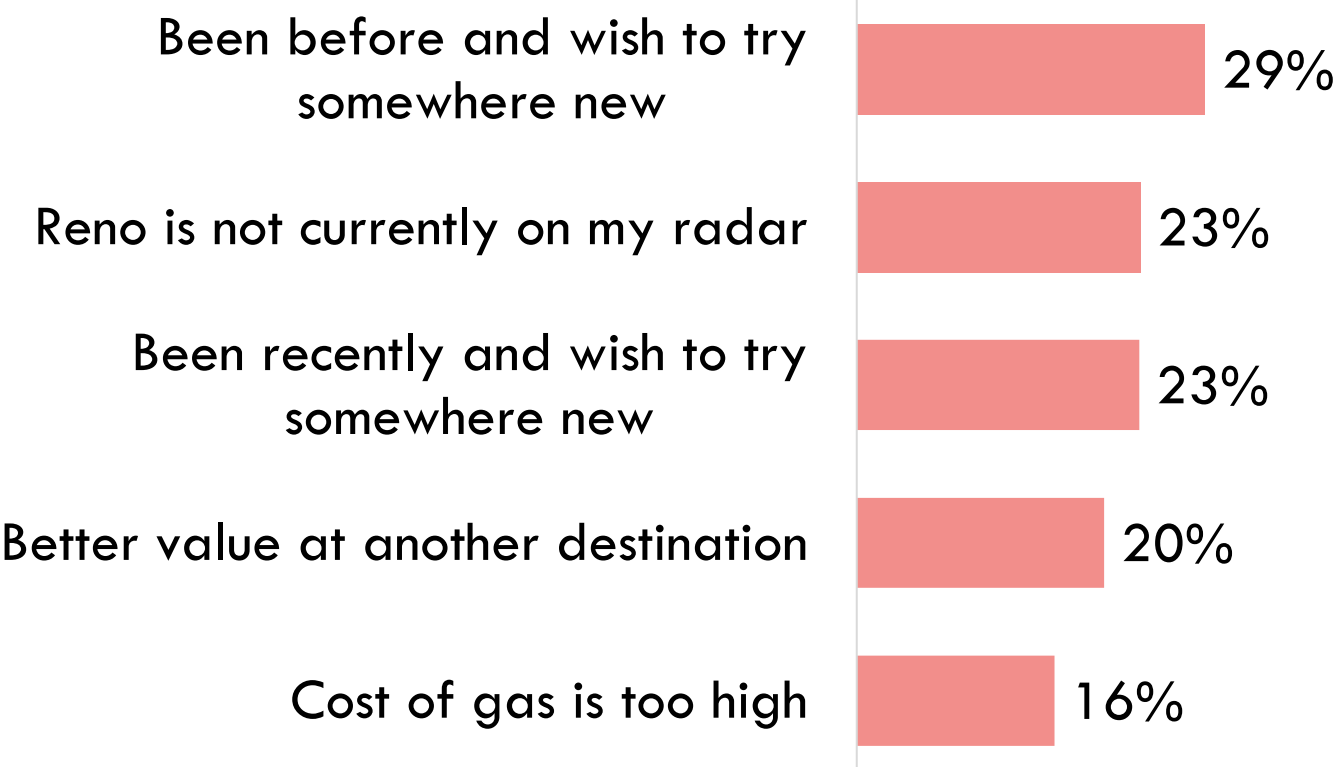
## LIKELIHOOD TO RETURN



## EXPERIENCED IN-DESTINATION ISSUES



## NEXT 12 MONTH RENO TRAVEL BARRIERS





# LAPSED VISITORS *Who they are*

## DEMOGRAPHICS



### Gender

Female: 46%  
Male: 54%



### Average Age: 53.2

Gen Z: 2%  
Millennials: 18%  
Gen Xers: 20%  
Boomers or older: 60%



### Household Income

\$81,477



### Marital Status

Married/partnered: 66%  
Single: 17%



### Ethnicity

White/Caucasian: 79%  
Asian/Pacific Islander: 9%  
Black/African American: 8%  
Hispanic/Latino: 7%



### Children in Household

Under 18: 19%





# LAPSED VISITORS

## Traveler Persona

### TOP TRAVEL MOTIVATORS

	Top 2 Box
For rest and relaxation	83%
To live life to its fullest	81%
To explore and do new things	81%
To take a break from everyday life	81%
To experience other cultures	75%

### TRAVELER MINDSET

	Top 2 Box
I enjoy trying new things, such as foods, experiences, and activities	77%
I travel to open my mind to new cultures and experiences	70%
I prefer experiences where I can really get a sense for the essence of a place	64%
Being outside and connecting with nature motivates me to travel	62%
I prefer slow travel over checking off a list	62%

### TOP TRAVEL INSPIRATION SOURCES



Friends/family  
direct contact 59%

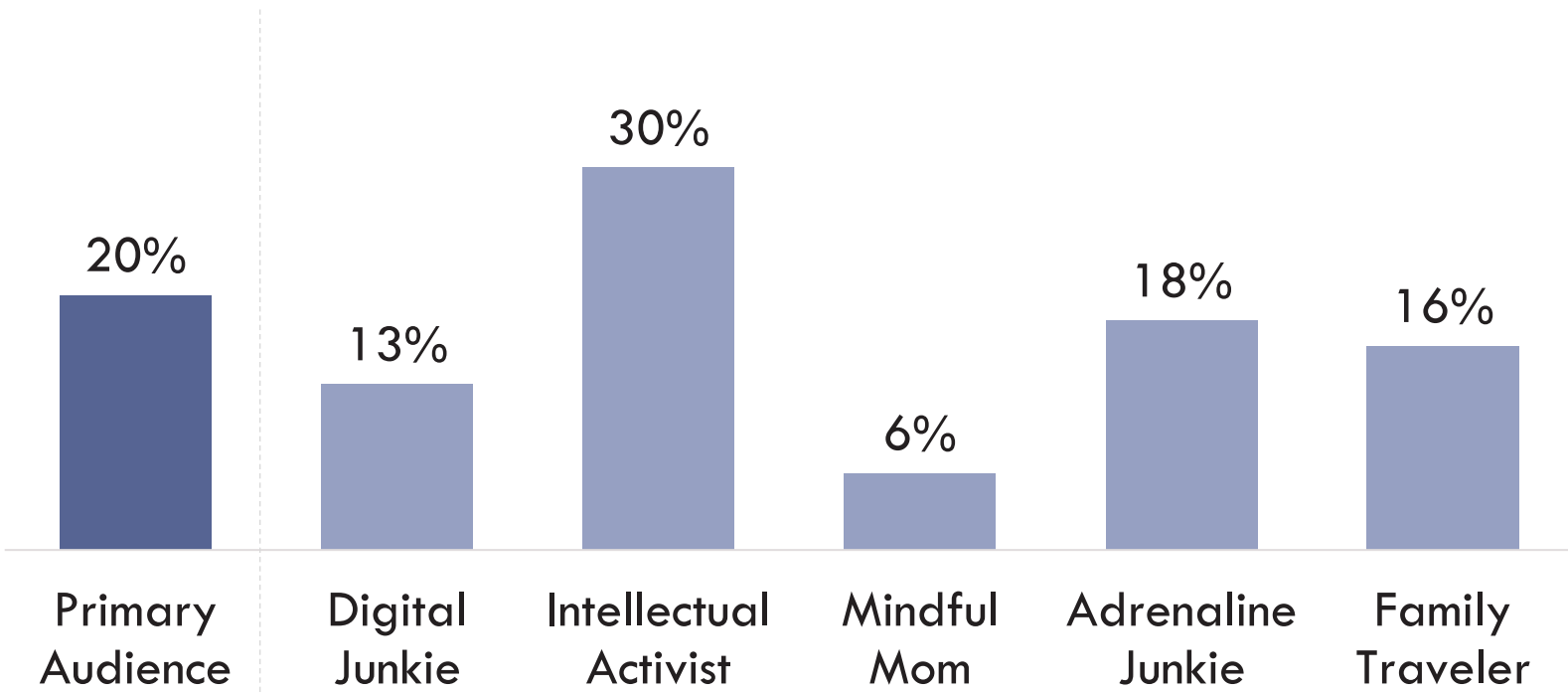


Travel review sites 43%

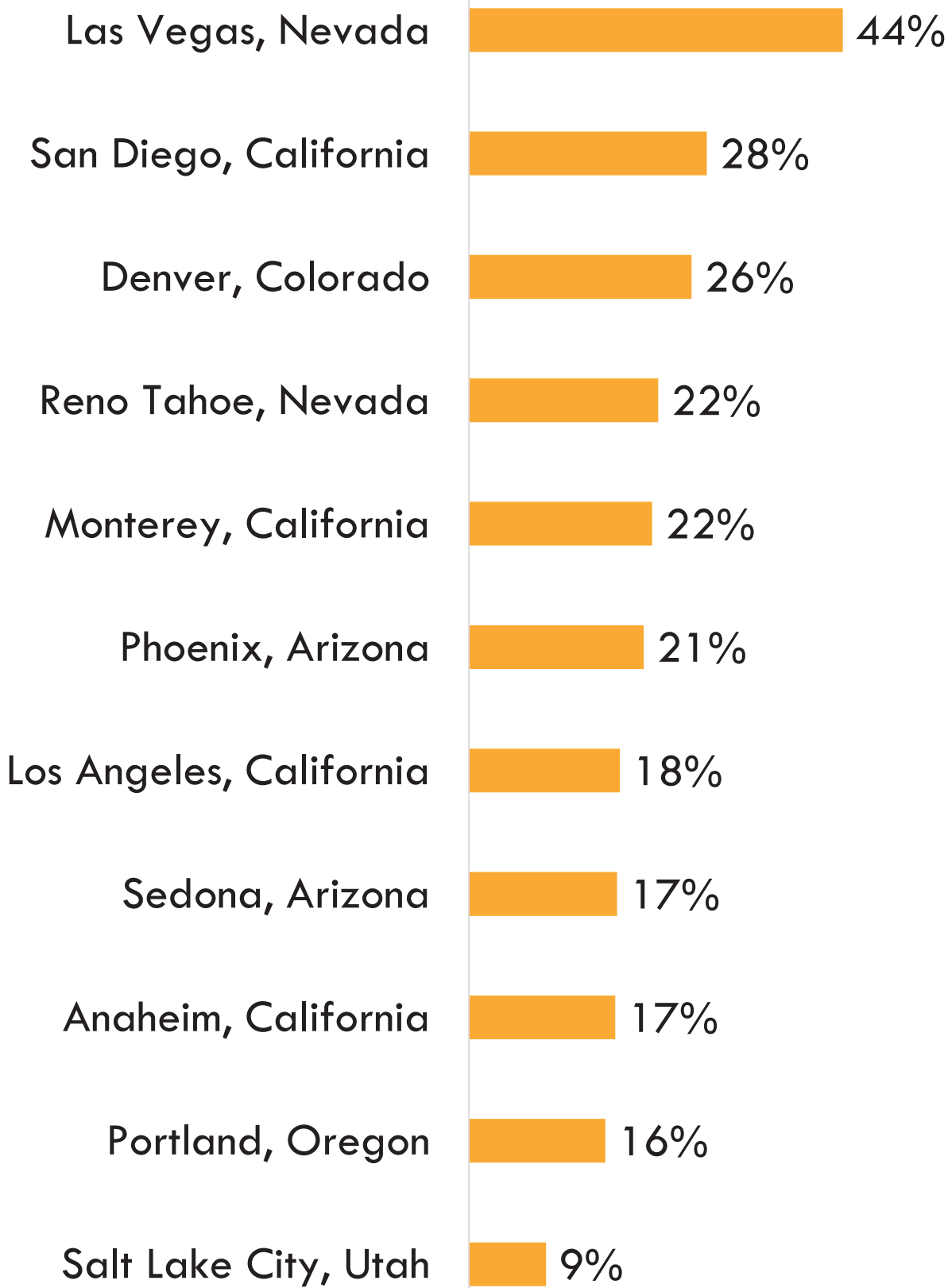


Online search 41%

### TARGET AUDIENCE SEGMENTS



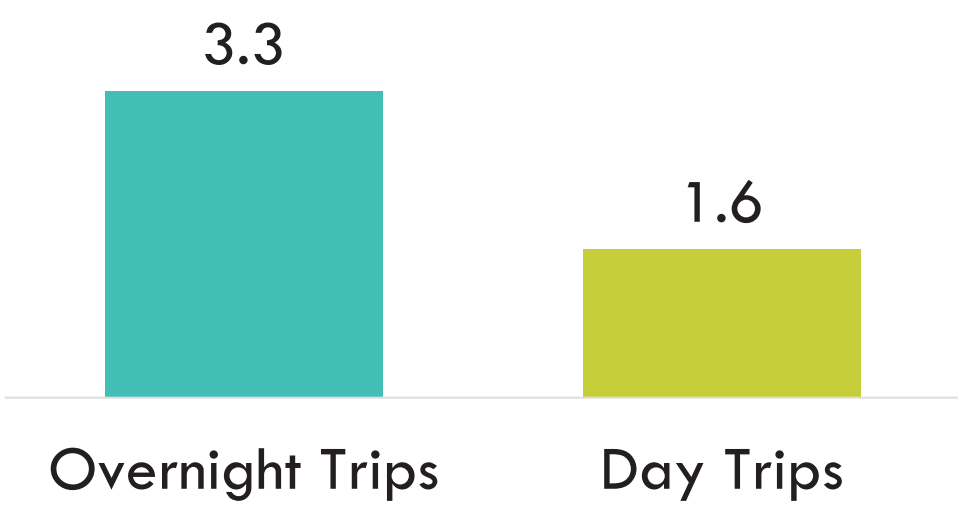
### INTERESTED VISITING NEXT 12 MONTHS



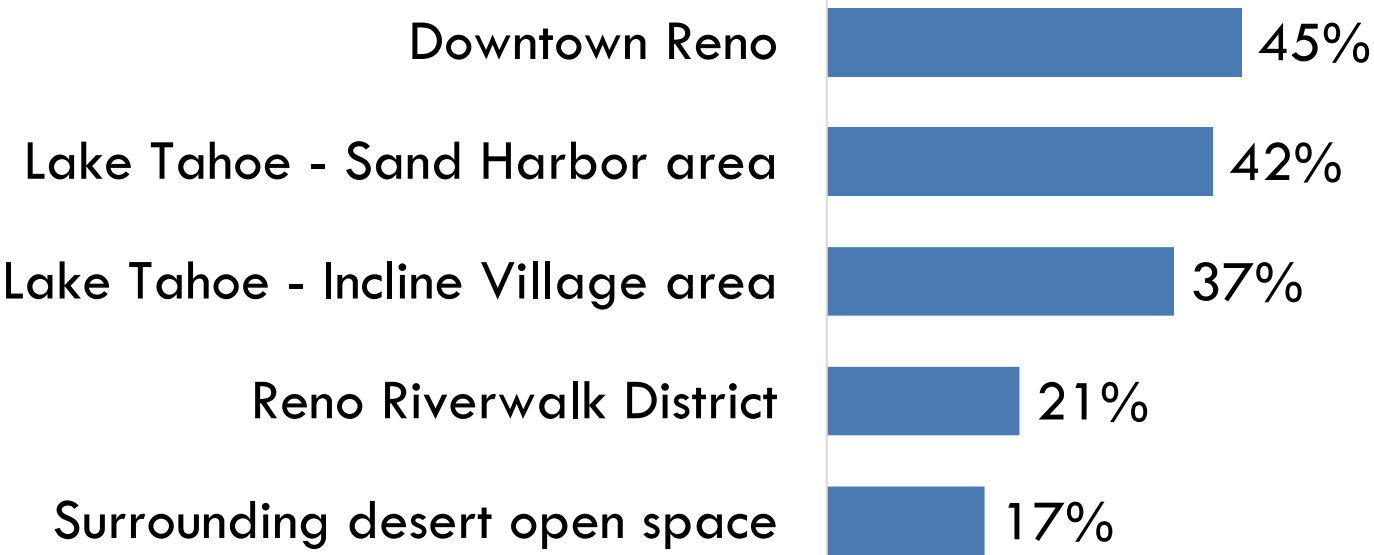


# LAPSED VISITORS *Reno Tahoe Travel*

## LIFETIME RENO VISTS



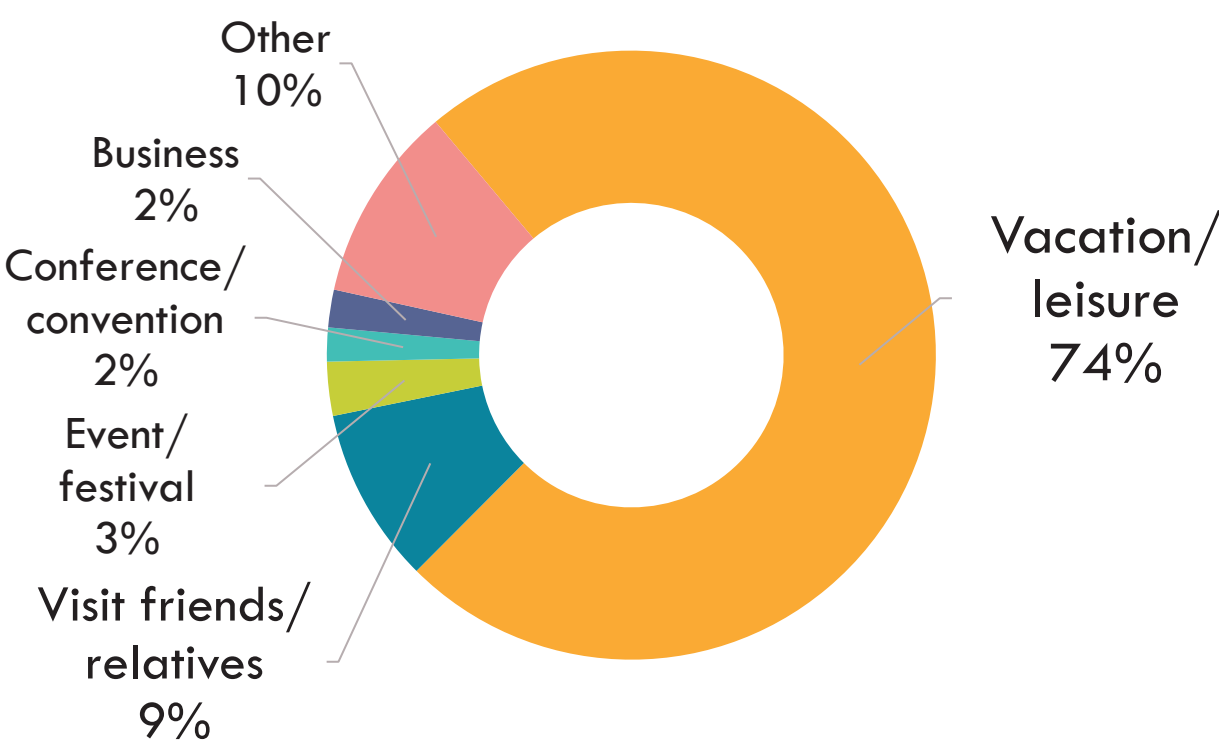
## AREAS VISITED LAST RENO TRIP



## ACTIVITIES LAST RENO TRIP

Visited Lake Tahoe	59%
Went shopping	47%
Gambling/gaming	39%
Went hiking	37%
Visited a museum	27%

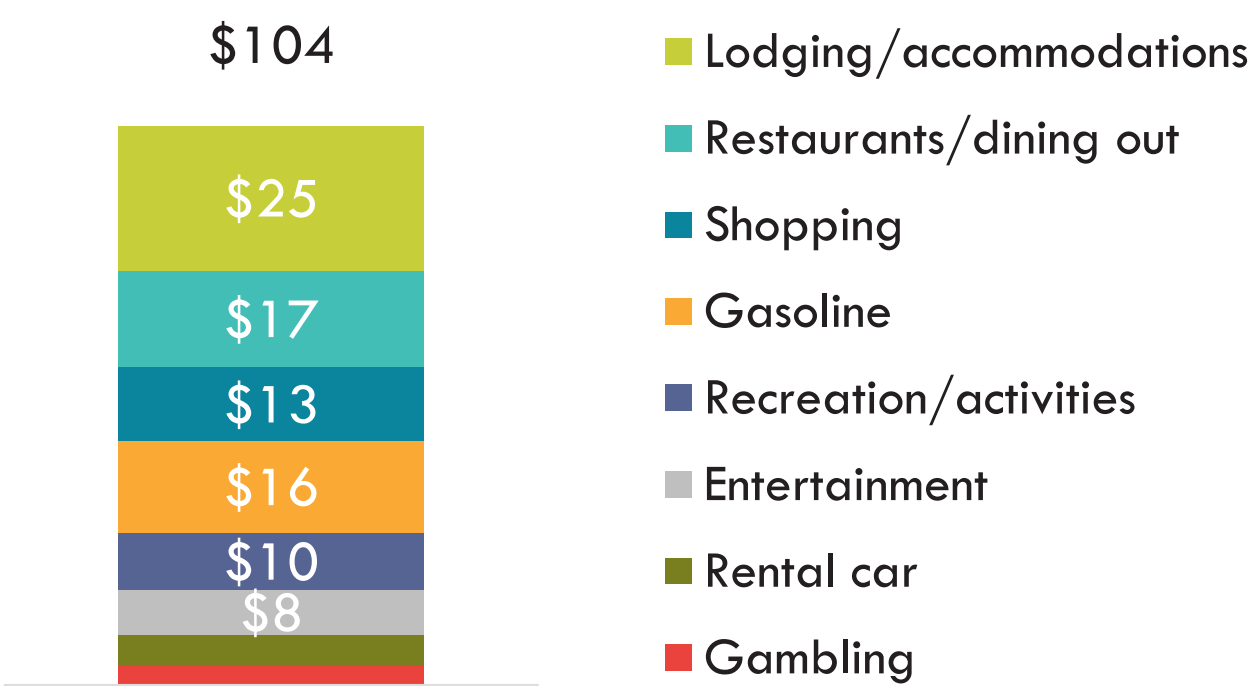
## PRIMARY PURPOSE OF LAST RENO TRIP



## ACCOMMODATION TYPES LAST RENO TRIP



## AVERAGE DAILY SPEND PER PERSON LAST RENO TRIP

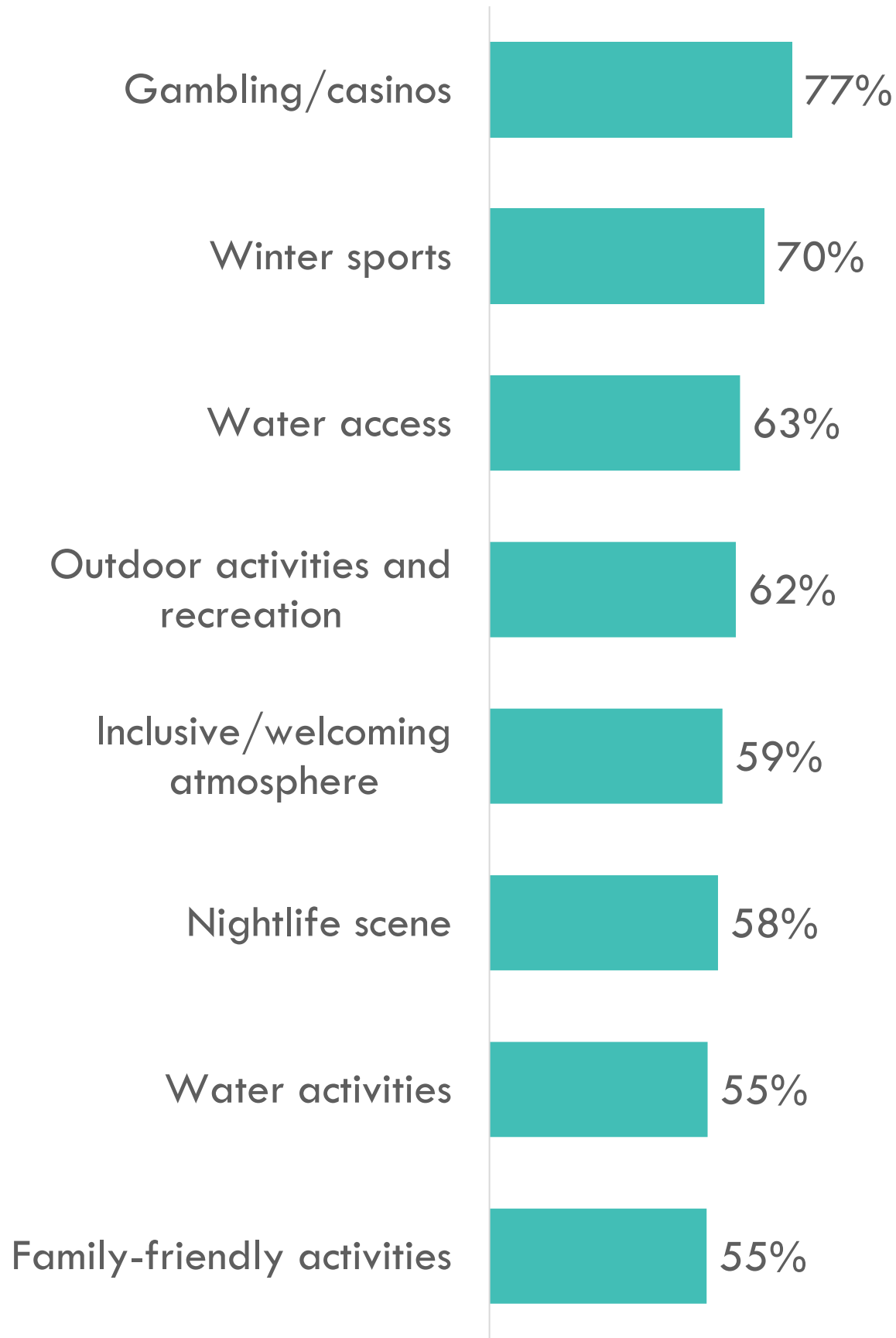




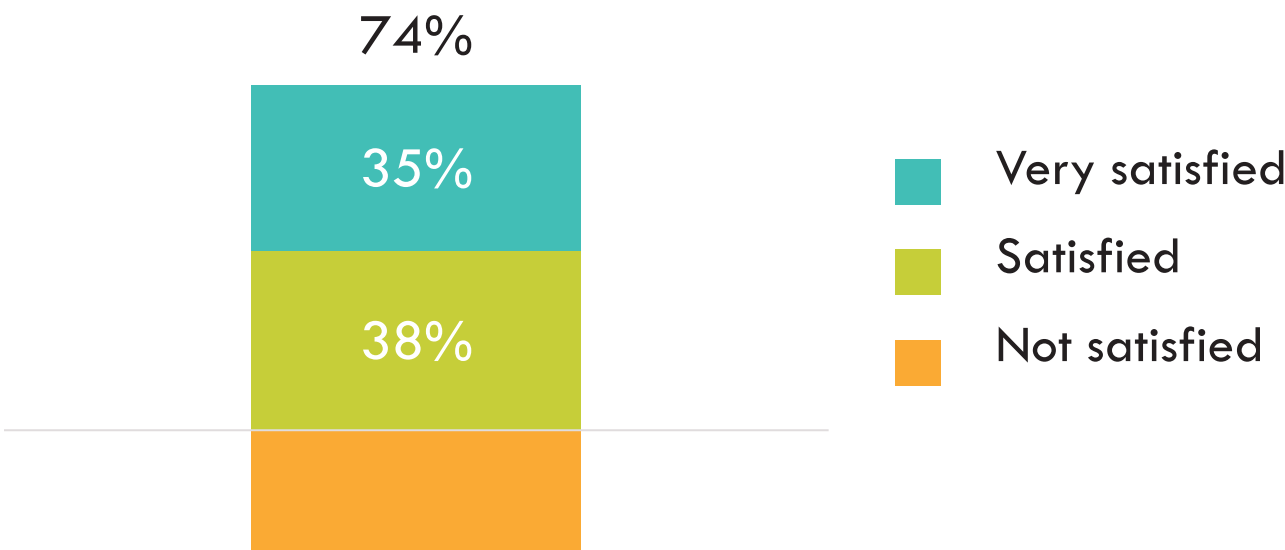
# LAPSED VISITORS

## Reno Tahoe Perceptions

### RENO TOP ATTRIBUTES



### SATISFACTION RATING LAST RENO TRIP



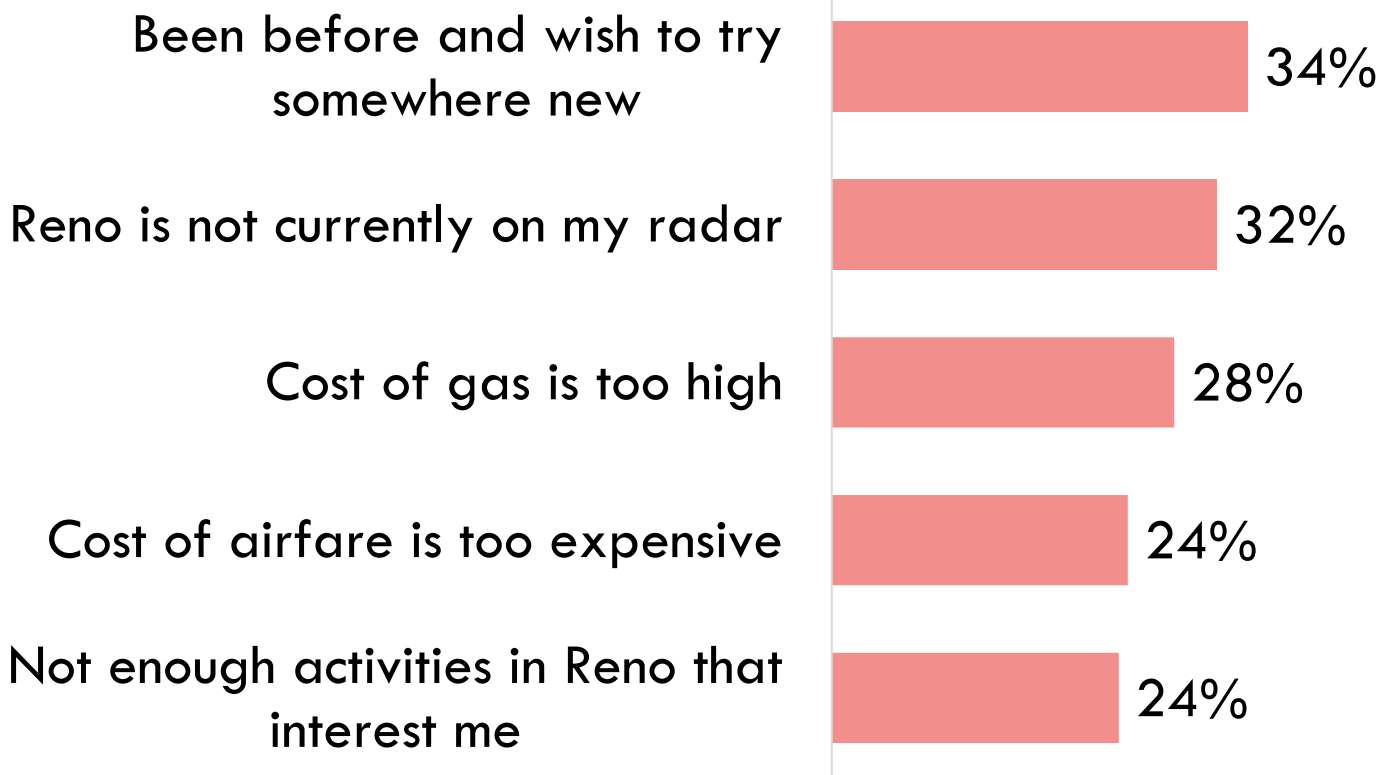
### LIKELIHOOD TO RETURN



### EXPERIENCED ISSUES LAST RENO TRIP



### NEXT 12 MONTH RENO TRAVEL BARRIERS





# TRAVEL INTENDERS *Who they are*

## DEMOGRAPHICS



### Gender

Female: 47%  
Male: 52%



### Marital Status

Married/partnered: 65%  
Single: 25%



### Average Age: 50.4

Gen Z: 1%  
Millennials: 35%  
Gen Xers: 24%  
Boomers or older: 39%



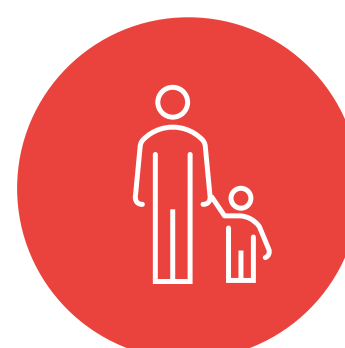
### Ethnicity

White/Caucasian: 82%  
Hispanic/Latino: 13%  
Asian/Pacific Islander: 7%  
Black/African American: 6%



### Household Income

\$84,594



### Children in Household

Under 18: 37%





# TRAVEL INTENDERS *Traveler Persona*

## TOP TRAVEL MOTIVATORS

	Top 2 Box
To take a break from everyday life	96%
To live life to its fullest	91%
To treat myself	87%
For rest and relaxation	87%
To try/learn new things	84%

## TRAVELER MINDSET

	Top 2 Box
I enjoy trying new things, such as foods, experiences, and activities	86%
I travel to open my mind to new cultures and experiences	84%
I prefer experiences where I can really get a sense for the essence of a place	79%
Building stronger connections with my family is important to why I travel	75%
I seek out exciting and stimulating experiences when I travel	75%

## TOP TRAVEL INSPIRATION SOURCES



Friends/family  
direct contact 54%

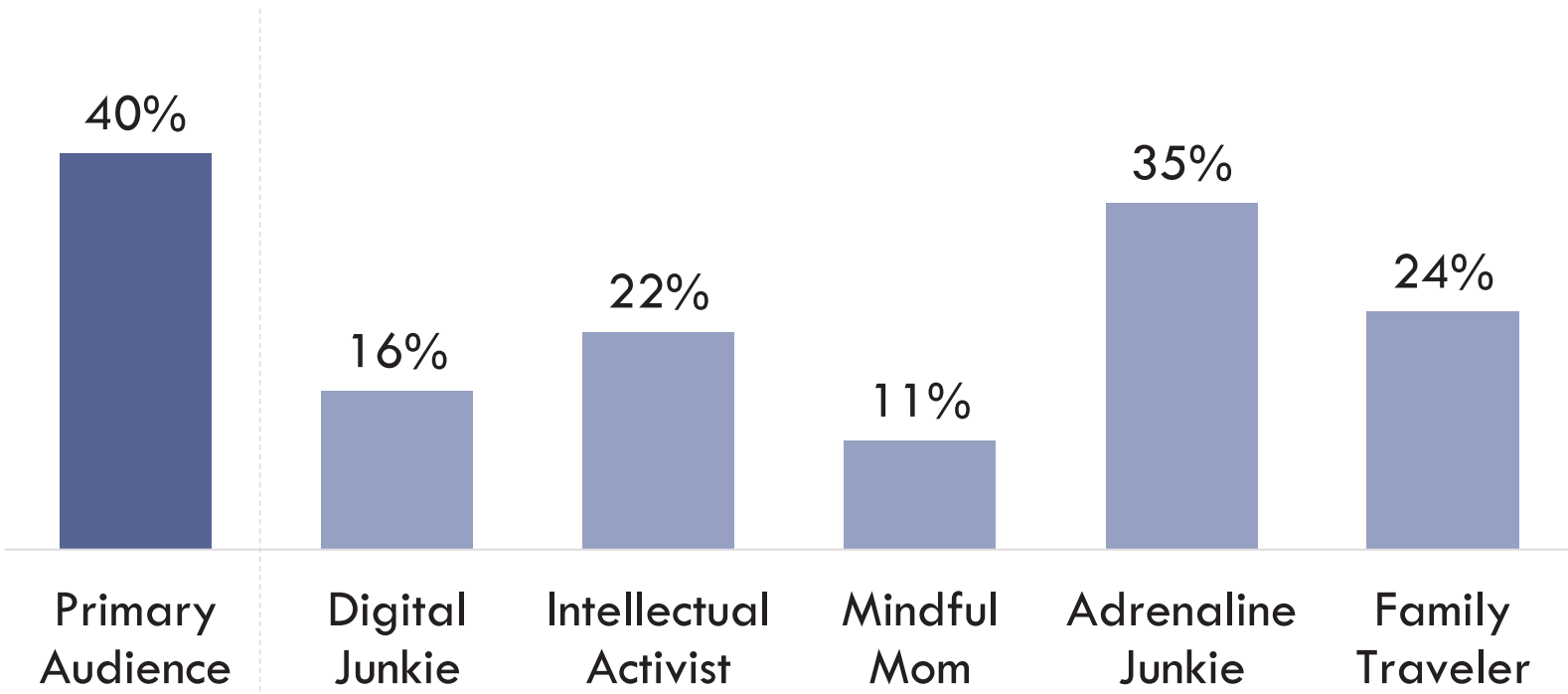


Online search 51%

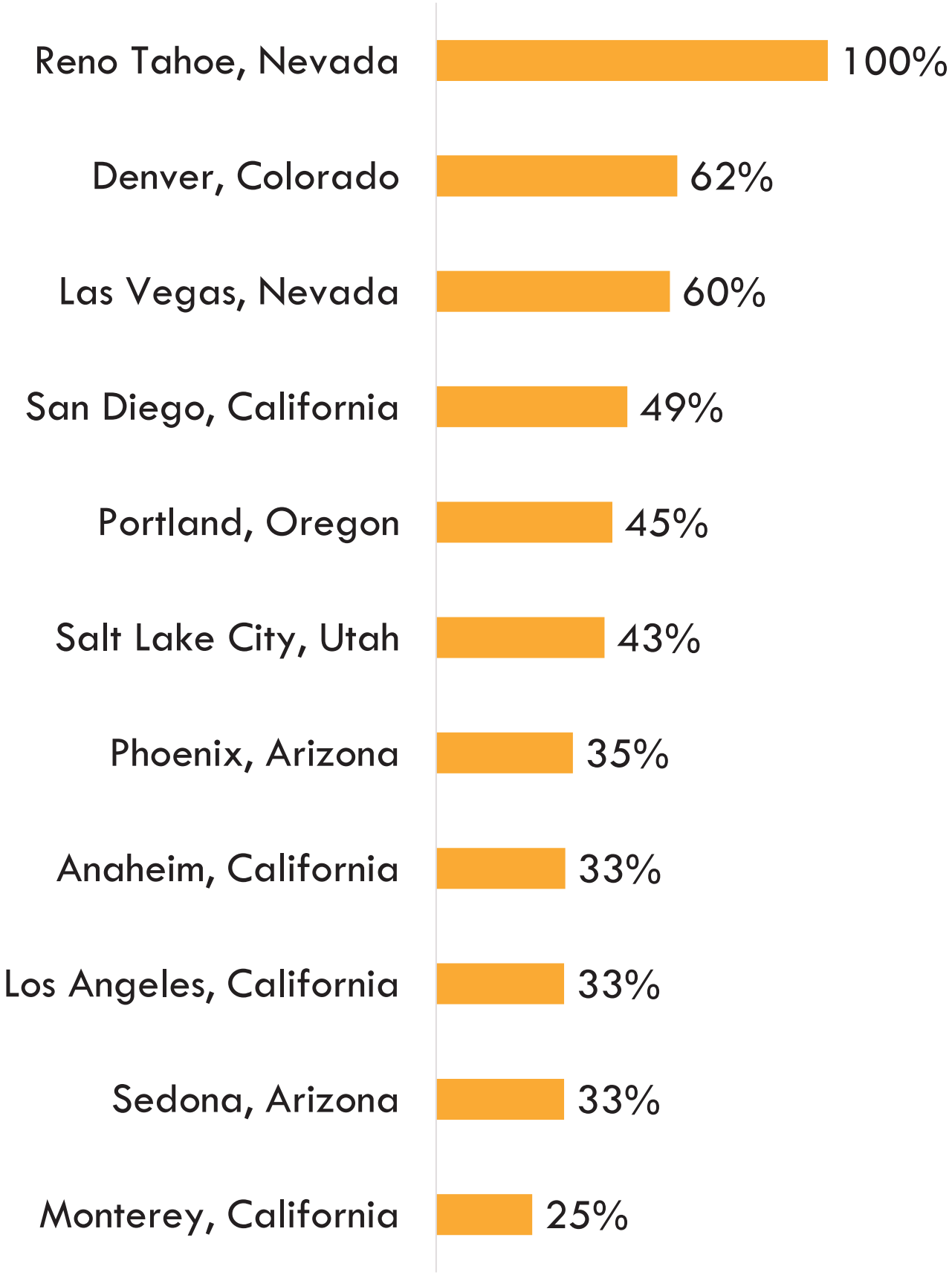


Friends/family via  
social media 49%

## TARGET AUDIENCE SEGMENTS

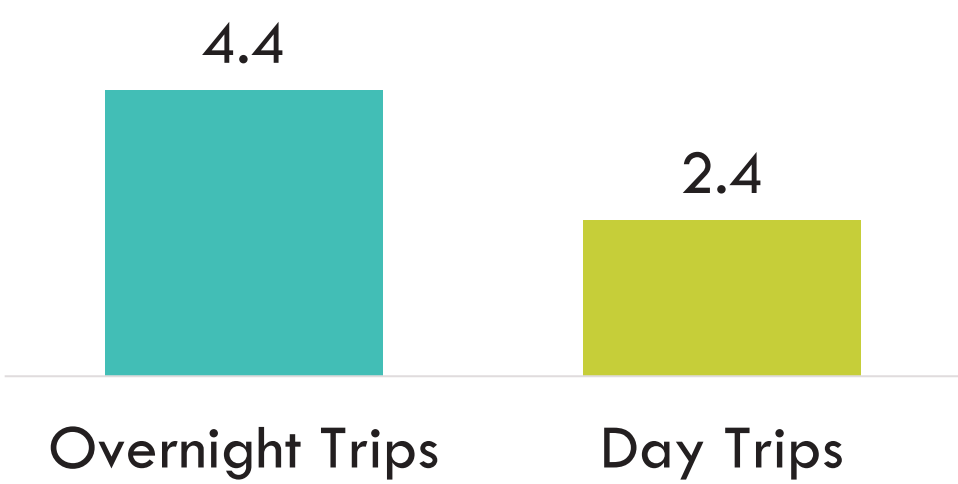


## INTERESTED VISITING NEXT 12 MONTHS

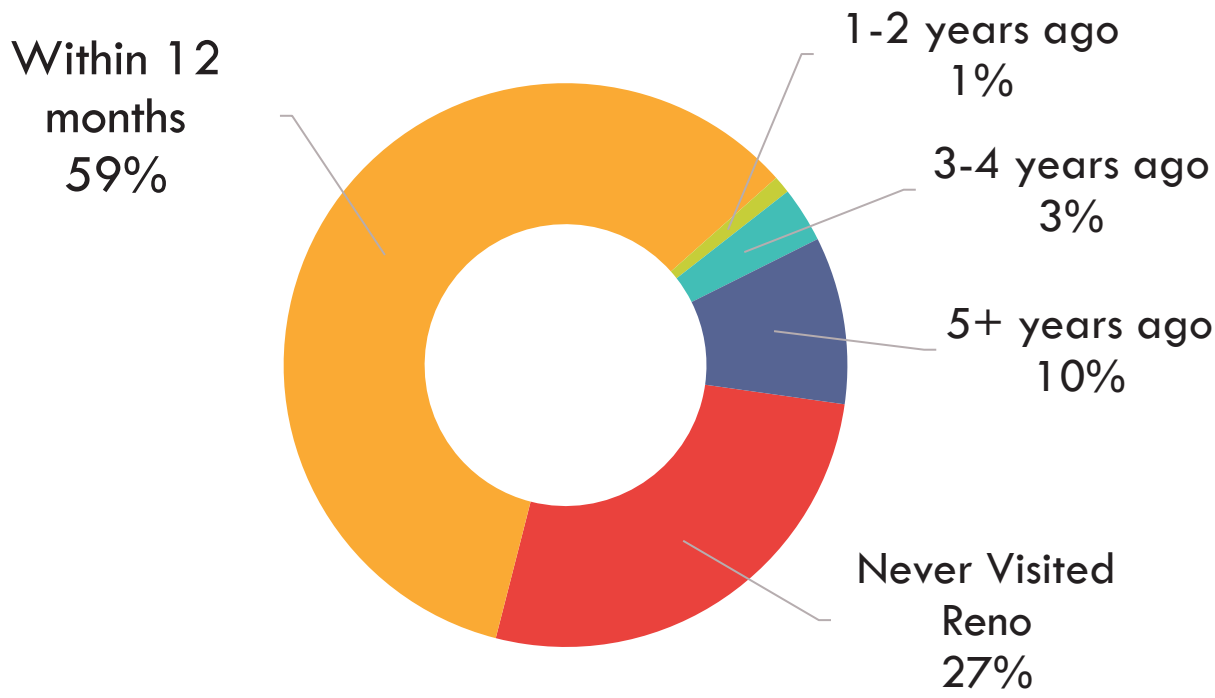


# TRAVEL INTENDERS *Reno Tahoe Travel*

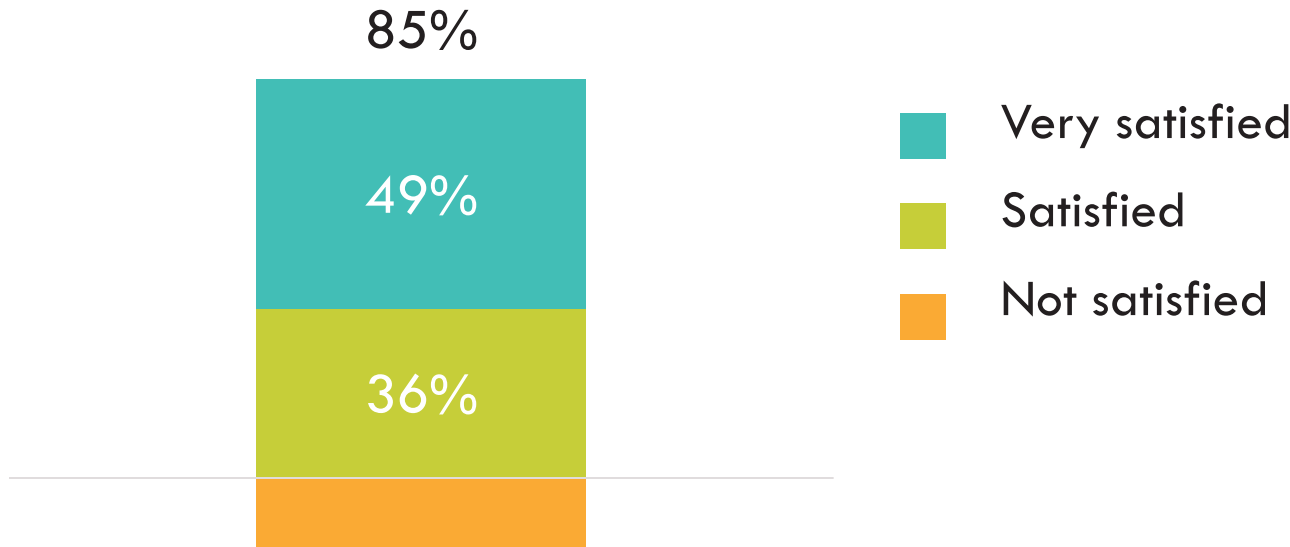
## LIFETIME RENO VISTS



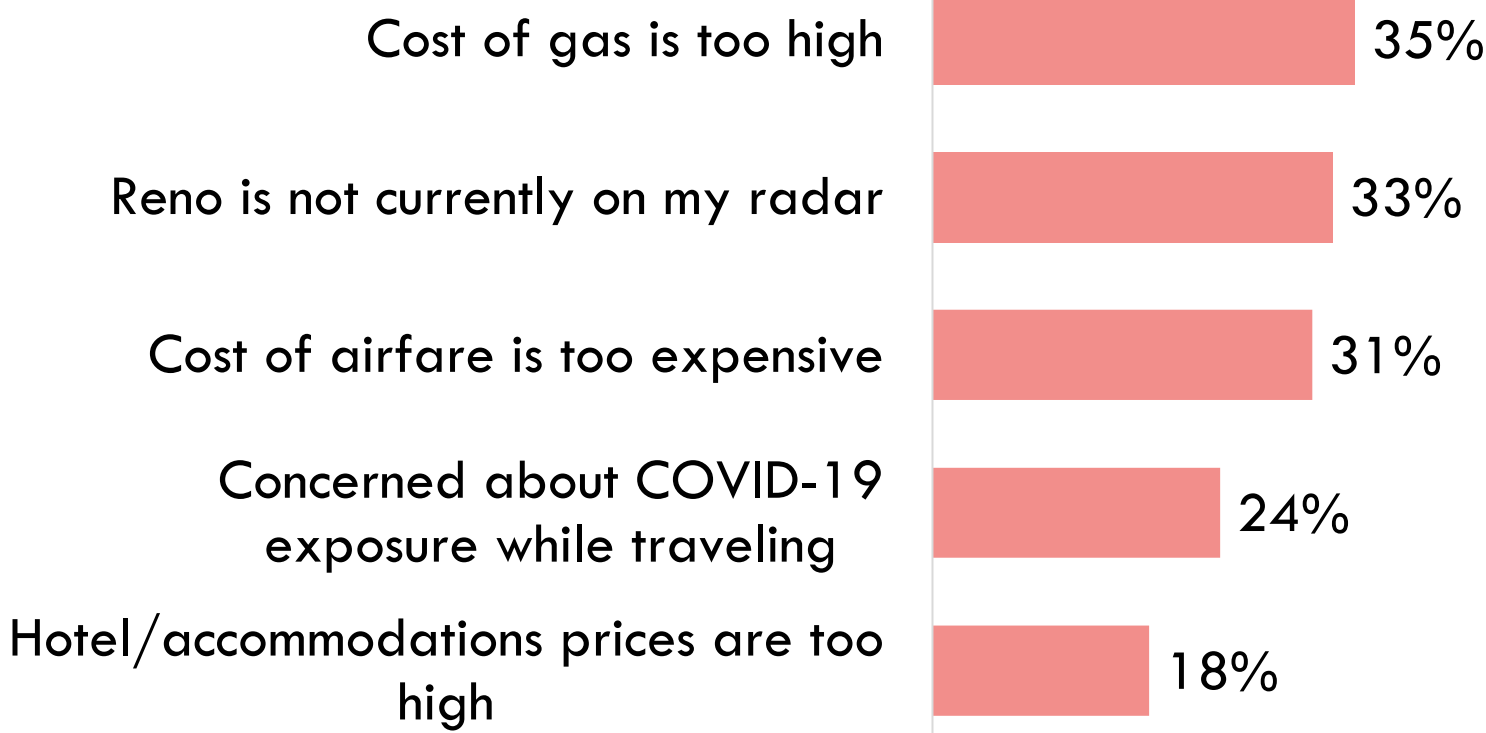
## LAST RENO TRIP



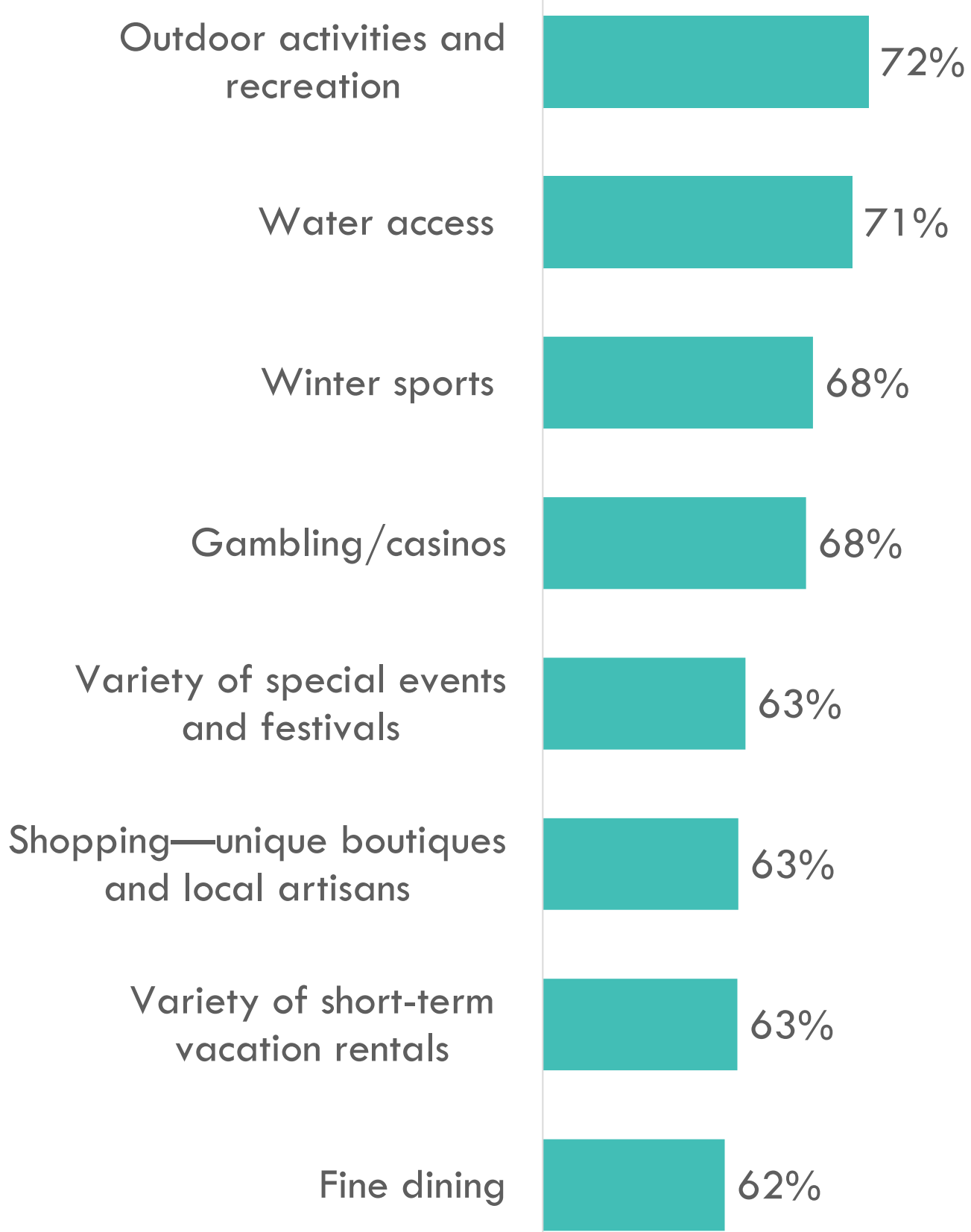
## SATISFACTION RATING LAST RENO TRIP



## NEXT 6 MONTH RENO TRAVEL BARRIERS



## TOP RENO ATTRIBUTES





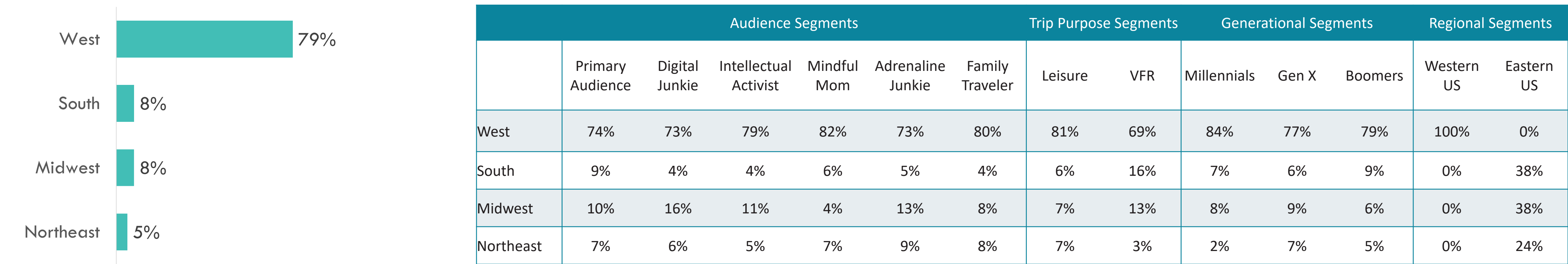
# ORIGIN SOURCES



# Origin Region

Nearly eight in ten past 12-month domestic Reno Tahoe visitors came from the Western region of the United States (79%), while one in ten live in the South or Midwest (8% each). Within the audience segments, Digital Junkie (16%) and Adrenaline Junkie (13%) visitors had a higher visitation rate from the Midwest. A higher proportion of VFR visitors also came from the South (16%) or Midwest (13%).

Figure 1: Origin Regions (Recent Visitors)



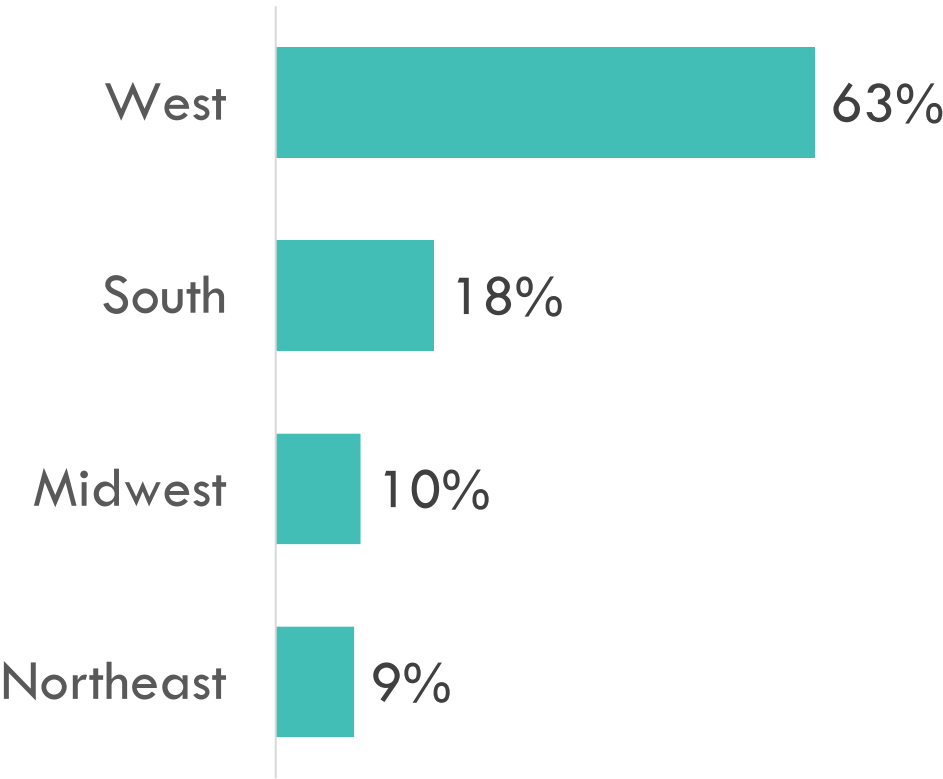
Question: What is your zip code? Base: Past 12-month Reno Tahoe visitors, 402 respondents.



# Origin Region

Nearly three quarters of potential Reno Tahoe visitors reside in the Western U.S. (63%), while 18 percent live in the South, ten percent in the Midwest, and nine percent in the Northeast. Those who are interested in visiting Reno Tahoe in the next 12 months mostly reside in the Western U.S. (72%), followed by the South (12%).

Figure 2: Origin Regions (Potential Visitors)



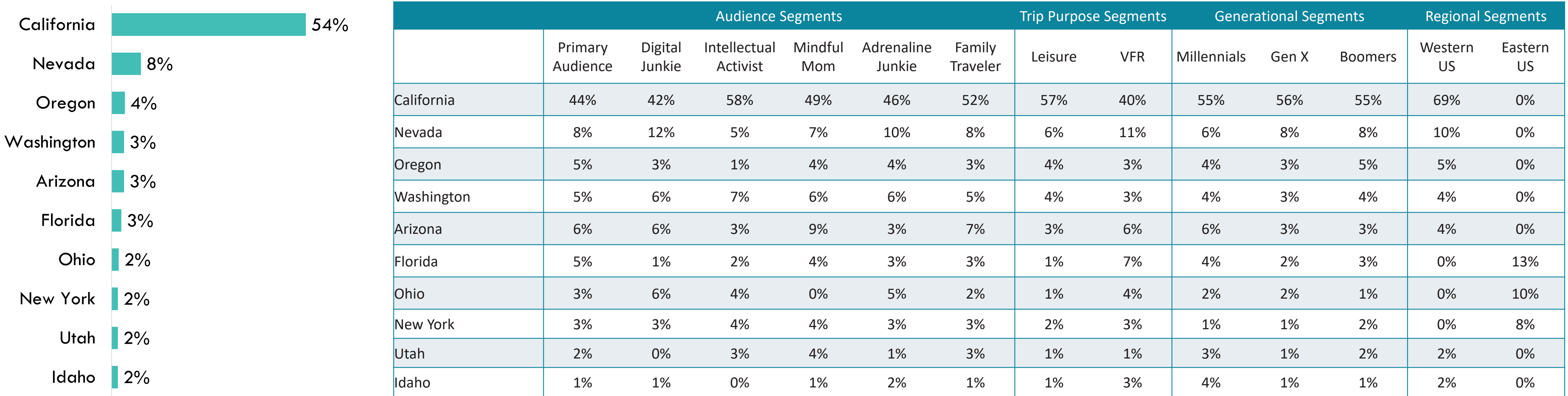
Audience Segments							Generational Segments				Reno Travel Segments		
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gen Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
West	63%	68%	67%	57%	71%	55%	62%	58%	57%	67%	85%	50%	72%
South	19%	18%	20%	23%	16%	25%	24%	23%	19%	16%	7%	25%	16%
Midwest	10%	6%	6%	11%	5%	10%	7%	9%	12%	10%	4%	13%	5%
Northeast	8%	7%	7%	9%	8%	10%	7%	10%	12%	8%	3%	13%	7%

Question: What is your zip code? Base: Not past 12-month Reno Tahoe visitors, 800 respondents.

# Top Origin States

More than half of past 12-month visitors to Reno Tahoe were from California (54%), followed distantly by Nevada (8%), Oregon (4%), Washington (3%), and Arizona (3%). VFR visitors were much more likely to visit from states outside California (60%), while Leisure visitors were slightly more likely to be from California (57%). Within the audience segments, Intellectual Activists (58%) and Family Travelers (52%) reported the highest visitation rate from California, while Digital (12%) and Adrenaline (10%) Junkies were slightly more likely to be from Nevada.

Figure 3: Top 10 Origin States (Recent Visitors)



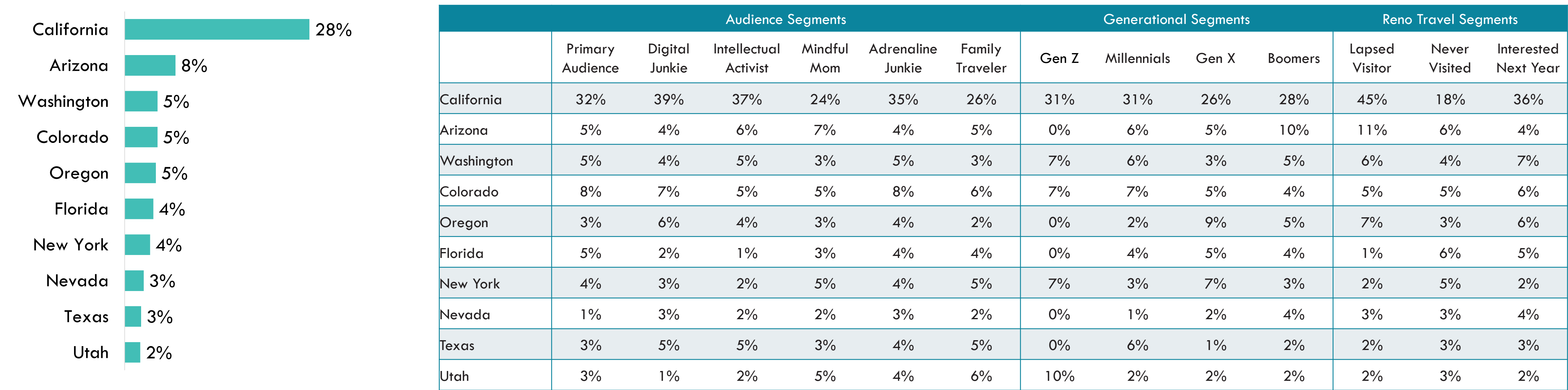
Question: What is your zip code? Base: Past 12-month Reno Tahoe visitors, 402 respondents.



# Top Origin States

Over one quarter of potential Reno Tahoe visitors are from California (28%), followed by Arizona (8%), Washington (5%), Colorado (5%), and Oregon (5%). Those who are interested in visiting Reno Tahoe in the next 12 months mostly reside in California (36%), followed distantly by Washington (7%), Colorado (6%), and Oregon (6%).

Figure 4: Top 10 Origin States (Potential Visitors)

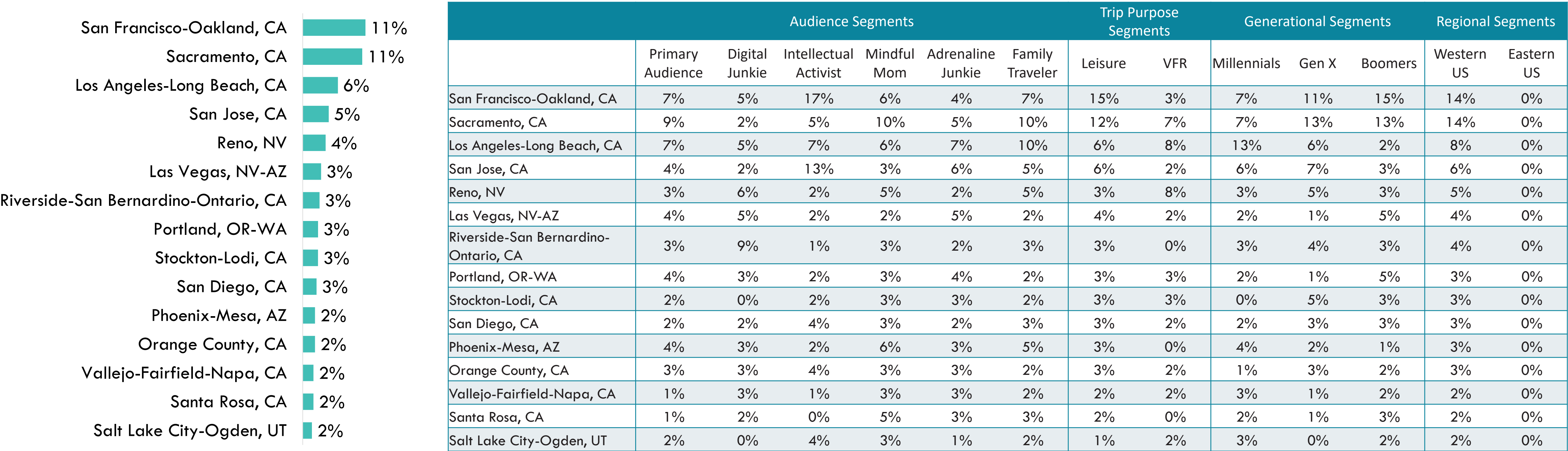


Question: What is your zip code? Base: Not past 12-month Reno Tahoe visitors, 800 respondents.

# Top Origin Markets

One in ten past 12-month visitors to Reno Tahoe were from the San Francisco-Oakland metro or Sacramento (11% each), followed by Los Angeles (6%), and San Jose (5%). Within the audience segments, Intellectual Activists were most likely to be from the Bay Area. Similarly, a higher percentage of Leisure visitors came from San Francisco-Oakland (15%).

Figure 5: Top 15 Origin Markets (Recent Visitors)



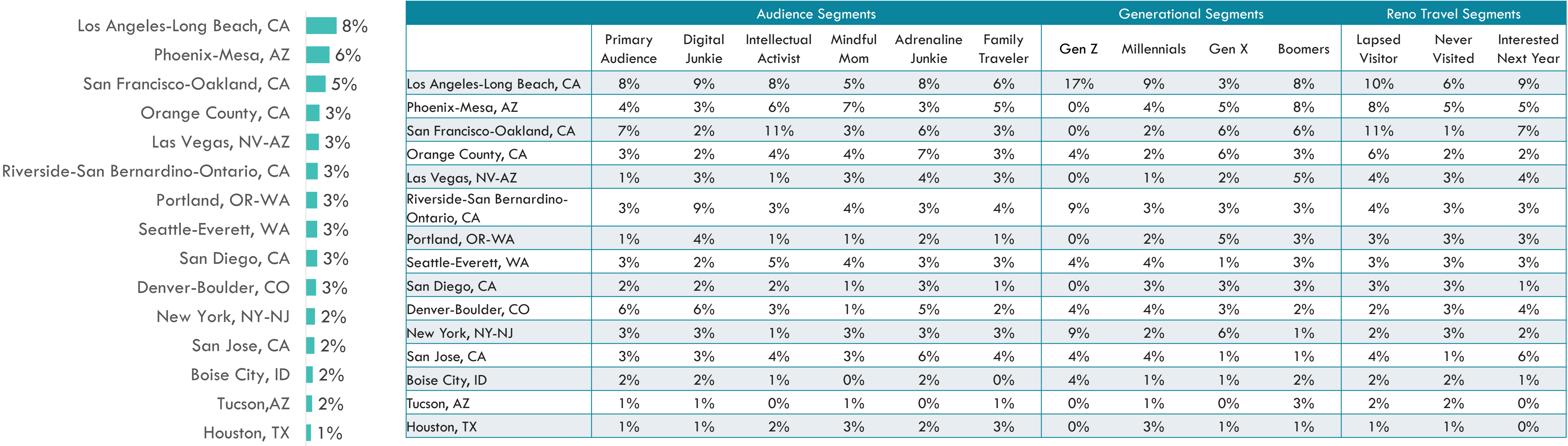
Question: What is your zip code? Base: Past 12-month Reno Tahoe visitors, 402 respondents.



# Top Origin Markets

Among potential Reno Tahoe travelers, the top origin markets include Los Angeles (8%), Phoenix (6%), and San Francisco-Oakland (5%). Those who are interested in visiting Reno Tahoe in the next 12 months are most likely to live in Los Angeles (9%), San Francisco (7%), and Phoenix-Mesa (5%).

Figure 6: Top 15 Origin Markets (Potential Visitors)



Question: What is your zip code? Base: Not past 12-month Reno Tahoe visitors, 800 respondents.



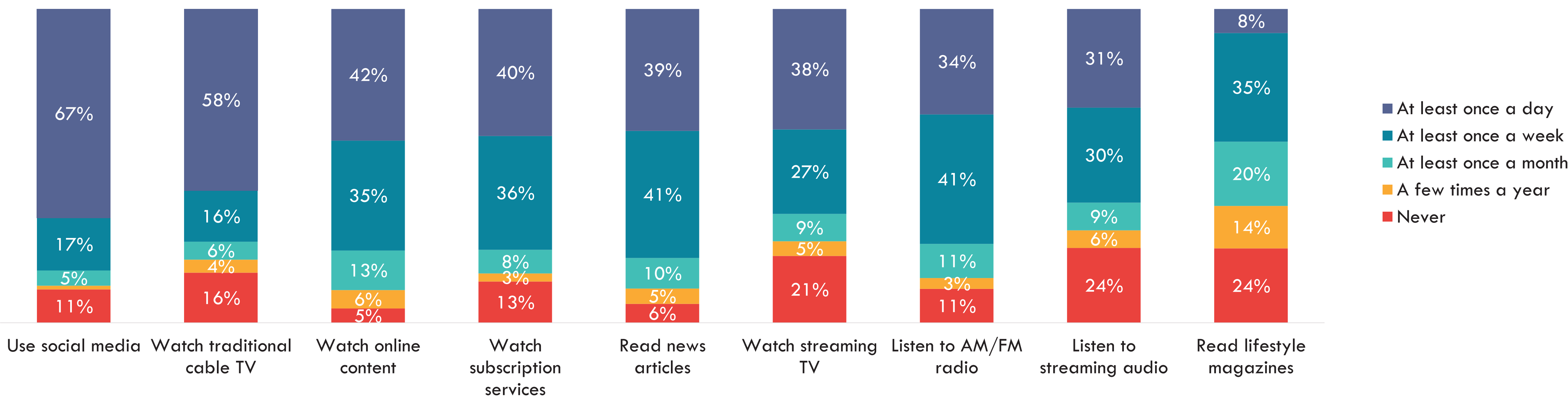


# TRAVEL PLANNING & MEDIA



**Two thirds of past 12-month Reno Tahoe visitors use social media at least once a day (67%), while 58 percent watch traditional cable TV daily.** Four in ten also watch online content (42%), watch subscription services (40%), and/or read news articles (39%) at least once a day. One quarter of past 12-month visitors never listen to streaming audio (24%) and/or read lifestyle magazines (24%). Within the audience segments, Digital (100%) and Adrenaline (82%) Junkies are most likely to use social media at least once a day, while the Primary Audience is most likely to watch traditional cable TV daily (58%).

Figure 7: Media Consumption Rates (Recent Visitors)



Question: How often do you...? Base: Past 12-month visitors, 402 respondents.

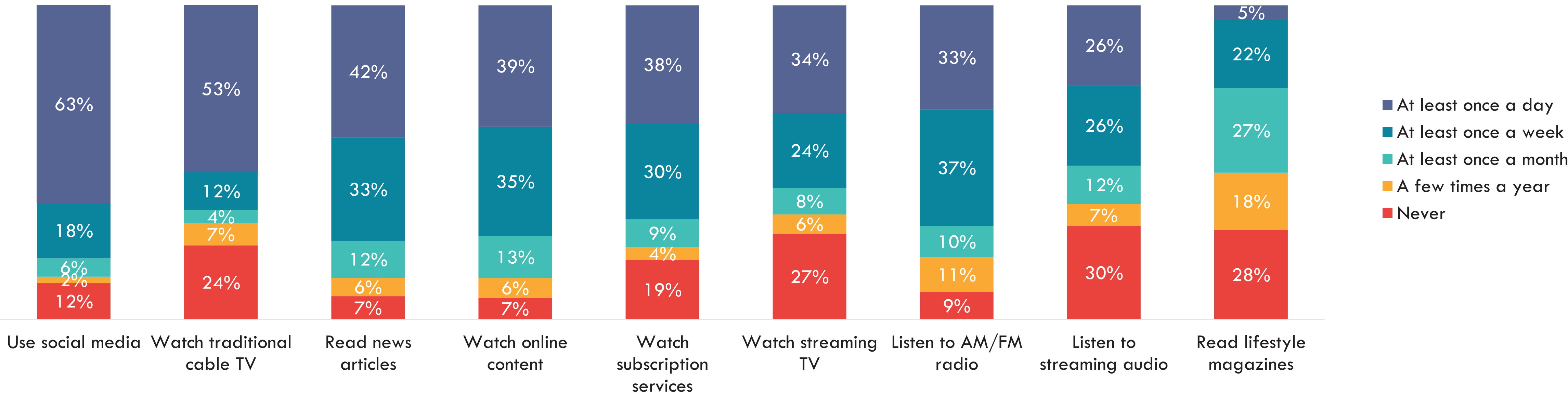
# Media Consumption by Segment

Daily Use	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Use social media (e.g., Facebook, Instagram, etc.)	74%	100%	62%	75%	82%	74%	62%	81%	78%	65%	61%	65%	68%
Watch traditional cable TV	68%	58%	59%	45%	67%	53%	59%	53%	33%	57%	73%	50%	62%
Watch online content (e.g., YouTube, etc.)	65%	100%	52%	63%	62%	63%	46%	33%	76%	36%	27%	42%	42%
Watch subscription services (e.g., Netflix, Disney+, etc.)	56%	76%	46%	66%	59%	55%	41%	37%	62%	38%	28%	44%	38%
Read news articles (print or online)	41%	42%	41%	38%	43%	45%	41%	35%	34%	36%	45%	49%	33%
Watch streaming TV (e.g., Hulu, Sling, etc.)	53%	81%	37%	56%	53%	52%	42%	30%	62%	41%	23%	42%	37%
Listen to AM/FM radio	50%	57%	39%	46%	48%	46%	37%	24%	28%	40%	30%	35%	33%
Listen to streaming audio (e.g., Spotify, etc.)	48%	100%	28%	41%	51%	44%	35%	23%	47%	32%	19%	30%	32%
Read lifestyle magazines (print or online)	11%	21%	2%	9%	9%	6%	6%	9%	8%	7%	6%	4%	10%



Nearly two thirds of potential Reno Tahoe visitors use social media at least once a day (63%), while 53 percent watch traditional cable TV daily. Four in ten also read online news articles (42%), watch online content (39%), and/or watch subscription services (38%) daily. More than one quarter of potential visitors never listen to streaming audio (30%), read lifestyle magazines (28%), and/or watch streaming TV (27%). Those interested in visiting Reno Tahoe in the next year are more likely to use Facebook (75%), watch traditional TV (57%), read news articles (50%), and/or watch online content (49%) daily.

Figure 8: Media Consumption Rates (Potential Visitors)



Question: How often do you...? Base: Not past 12-month Reno Tahoe visitors, 800 respondents.

# Media Consumption by Segment

POTENTIAL VISITORS

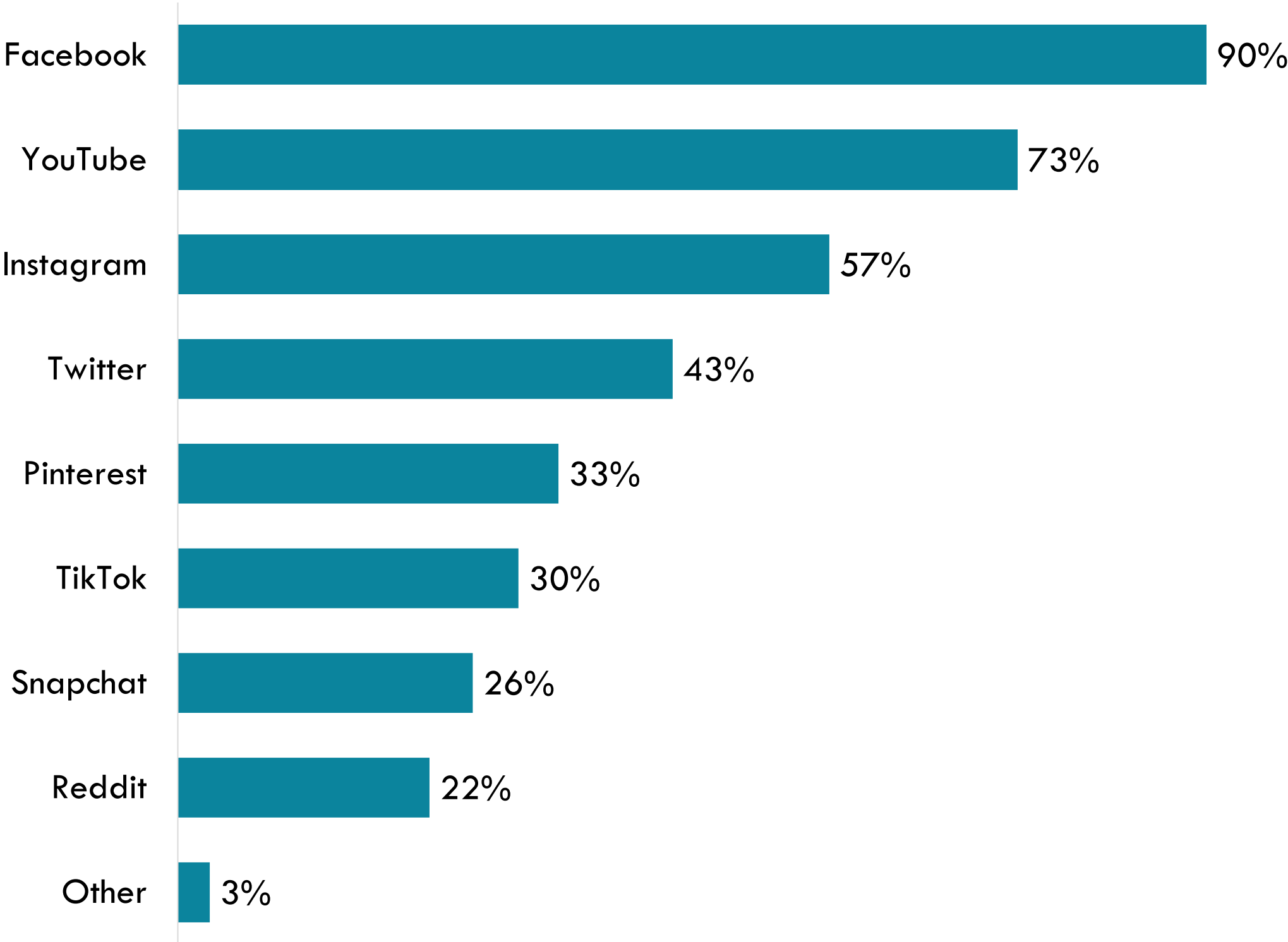
Daily Use	Audience Segments						Generational Segments				Reno Travel Segments		
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gen Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
Use social media (e.g., Facebook, Instagram, etc.)	70%	100%	61%	79%	69%	72%	85%	71%	68%	55%	56%	65%	75%
Watch traditional cable TV	44%	49%	44%	34%	48%	41%	19%	37%	53%	64%	59%	51%	57%
Read news articles (print or online)	35%	53%	40%	35%	46%	36%	18%	25%	45%	52%	62%	36%	50%
Watch online content (e.g., YouTube, etc.)	51%	100%	45%	58%	57%	60%	64%	61%	42%	24%	32%	41%	49%
Watch subscription services (e.g., Netflix, Disney+, etc.)	51%	77%	41%	53%	56%	54%	63%	53%	43%	25%	35%	38%	44%
Watch streaming TV (e.g., Hulu, Sling, etc.)	46%	70%	36%	52%	45%	49%	66%	43%	34%	27%	36%	34%	38%
Listen to AM/FM radio	37%	45%	37%	32%	44%	40%	15%	35%	37%	31%	41%	31%	37%
Listen to streaming audio (e.g., Spotify, etc.)	38%	100%	30%	27%	38%	35%	64%	46%	23%	13%	27%	25%	27%
Read lifestyle magazines (print or online)	5%	15%	5%	4%	4%	4%	1%	6%	2%	5%	7%	4%	11%



The top social media platforms used by past 12-month visitors to Reno Tahoe include Facebook (90%), YouTube (73%), and Instagram (57%). Less than half use Twitter (43%), Pinterest (33%), and/or TikTok (30%).

Within the audience segments, Adrenaline Junkies (93%), Digital Junkies (92%), and Family Travelers (91%) utilize Facebook most. YouTube is most often accessed by Digital Junkies (97%), followed by Family Travelers (93%). Mindful Moms report the highest Instagram usage (83%).

Figure 9: Social Media Platforms Used (Recent Visitors)



Question: Which social media platforms do you typically use? Base: Social media users, 371 respondents.

# Social Media Platforms by Segment

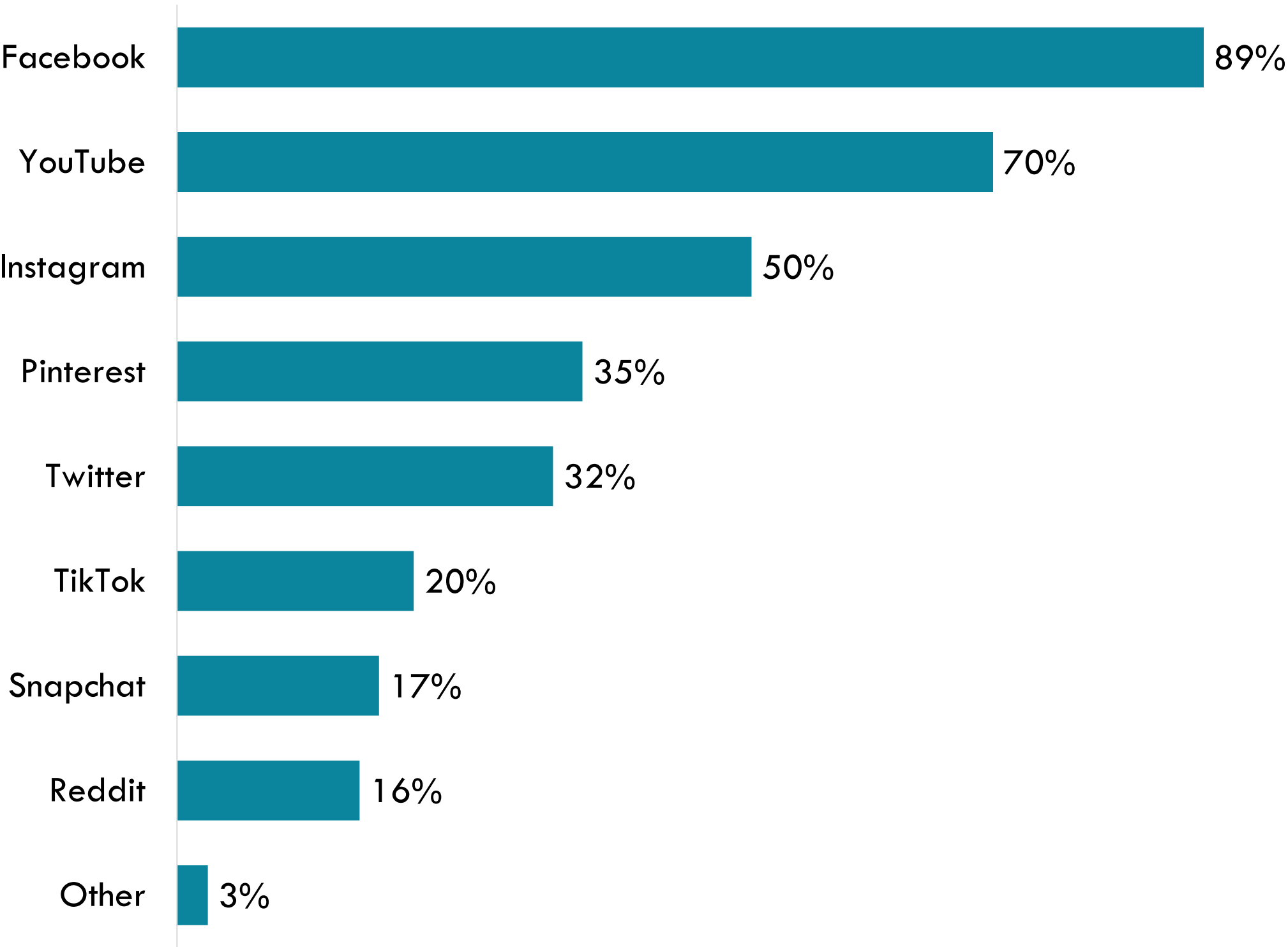
	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Facebook	90%	92%	82%	86%	93%	91%	89%	95%	88%	90%	93%	87%	91%
YouTube	84%	97%	76%	91%	91%	93%	76%	68%	84%	82%	57%	69%	75%
Instagram	76%	86%	68%	83%	72%	73%	53%	68%	80%	56%	42%	50%	61%
Twitter	57%	74%	54%	50%	57%	61%	43%	42%	54%	50%	29%	35%	48%
Pinterest	44%	53%	39%	62%	44%	52%	35%	29%	53%	25%	27%	32%	34%
TikTok	51%	59%	40%	45%	46%	45%	30%	25%	46%	34%	12%	24%	33%
Snapchat	40%	54%	35%	31%	37%	36%	26%	25%	37%	25%	12%	18%	30%
Reddit	28%	56%	24%	22%	39%	30%	25%	15%	38%	15%	13%	18%	24%
Other	1%	4%	5%	0%	1%	0%	1%	4%	1%	4%	3%	3%	3%



The top social media platforms used by potential visitors to Reno Tahoe include Facebook (89%), YouTube (70%), and Instagram (50%). One third use Pinterest (35%) and/or Twitter (32%).

Those who are interested in visiting Reno Tahoe in the next year report a higher rate of usage of Facebook (92%), YouTube (79%), Instagram (54%), and Pinterest (40%).

Figure 10: Social Media Platforms Used (Potential Visitors)



Question: Which social media platforms do you typically use? Base: Social media users, 695 respondents.

# Social Media Platforms by Segment

POTENTIAL VISITORS

	Audience Segments						Generational Segments				Reno Travel Segments		
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gen Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
Facebook	91%	84%	92%	93%	92%	93%	82%	81%	92%	92%	95%	87%	92%
YouTube	81%	96%	73%	83%	86%	84%	79%	90%	75%	54%	68%	71%	79%
Instagram	60%	70%	48%	64%	61%	65%	89%	72%	49%	32%	47%	50%	54%
Twitter	40%	43%	40%	65%	54%	53%	27%	49%	35%	27%	28%	37%	37%
Pinterest	46%	44%	38%	28%	50%	41%	63%	41%	32%	24%	31%	33%	40%
TikTok	32%	55%	22%	36%	38%	33%	57%	38%	17%	8%	14%	22%	28%
Snapchat	20%	28%	17%	30%	24%	30%	64%	32%	15%	5%	11%	19%	27%
Reddit	21%	23%	18%	17%	19%	18%	37%	31%	14%	5%	12%	17%	15%
Other	3%	4%	1%	1%	3%	1%	1%	2%	1%	4%	2%	3%	1%

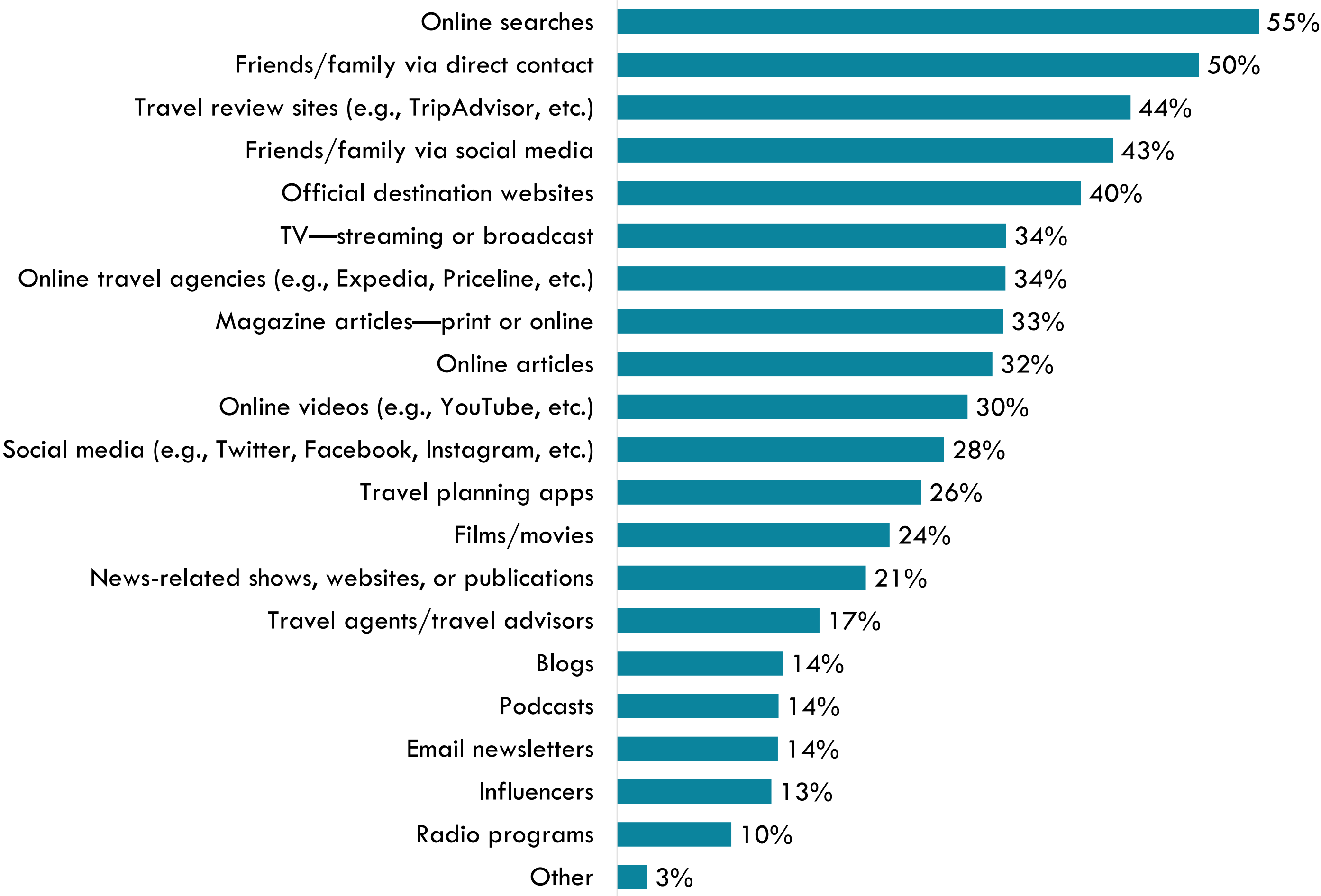


Past 12-month Reno Tahoe visitors look for travel inspiration using online search (55%), word of mouth from friends/family (50%), travel review sites (44%), friends/family via social media, and/or destination websites (40%).

Within the various audience segments, Digital (70%) and Adrenaline (66%) Junkies use online search at a higher rate than the general visitor, whereas Family Travelers are more likely to rely on word of mouth from friends/family (62%). Mindful Moms are most likely to use travel review sites (60%).

Within the generational segments, Millennials are most likely to use the social media accounts of friends/family for travel inspiration (60%), much higher than their Gen X (39%) and Boomer (30%) counterparts.

Figure 11: Travel Inspiration Sources (Recent Visitors)



Question: Where do you look for travel inspiration? Base: Past 12-month visitors, 402 respondents.

# Travel Inspiration by Segment

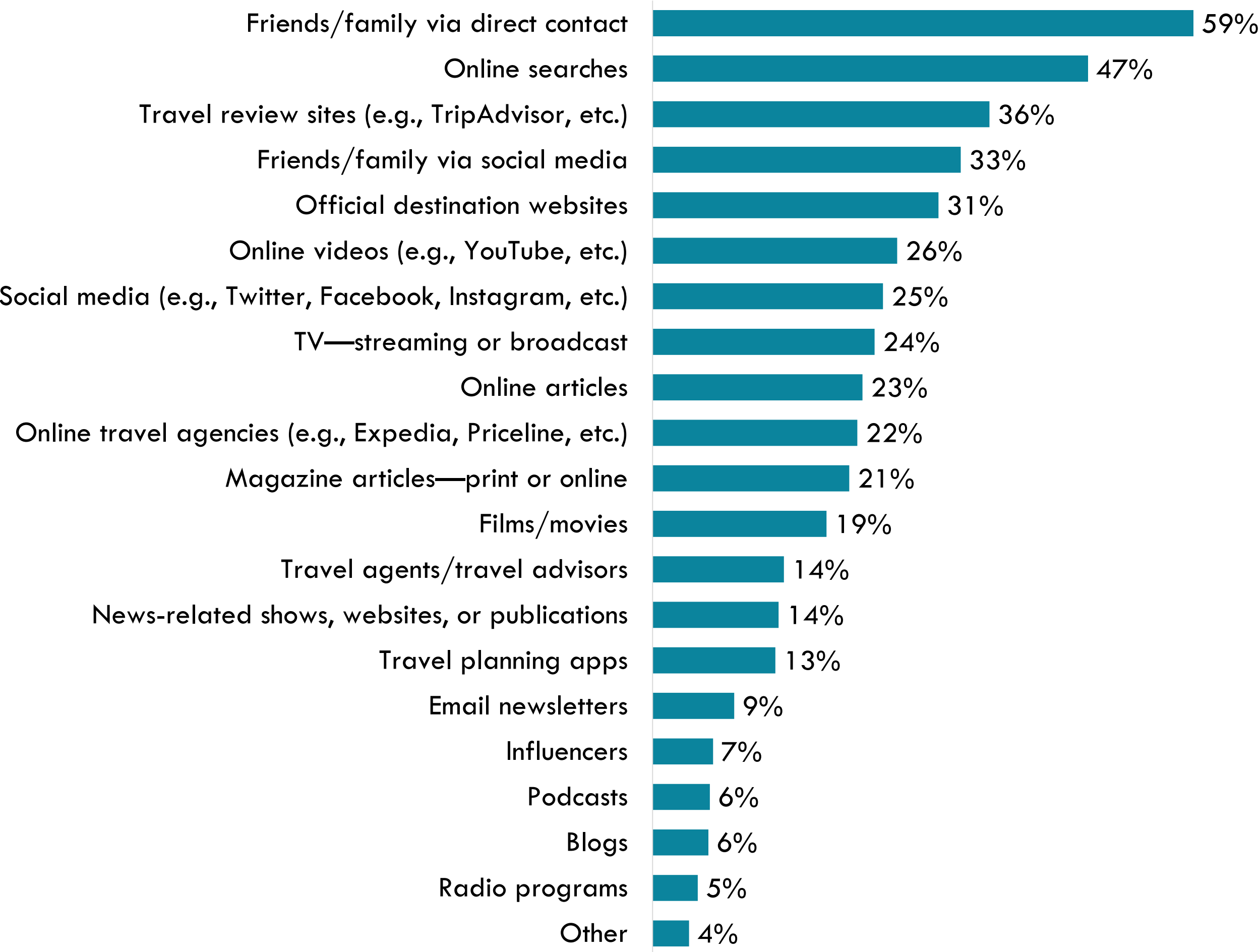
	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Online searches	59%	70%	65%	50%	66%	45%	57%	62%	60%	50%	54%	57%	54%
Friends/family via direct contact	51%	57%	41%	49%	60%	62%	54%	51%	57%	51%	48%	54%	48%
Travel review sites (e.g., TripAdvisor, etc.)	50%	54%	50%	60%	56%	50%	49%	39%	54%	43%	40%	40%	47%
Friends/family via social media	55%	75%	33%	53%	52%	54%	40%	42%	60%	39%	33%	37%	46%
Official destination websites	42%	51%	52%	30%	43%	23%	41%	49%	39%	37%	43%	34%	43%
TV—streaming or broadcast	41%	53%	32%	22%	42%	37%	38%	27%	40%	29%	28%	26%	38%
Online travel agencies (e.g., Expedia, Priceline, etc.)	39%	50%	38%	53%	47%	49%	36%	34%	41%	41%	28%	33%	34%
Magazine articles—print or online	38%	48%	26%	32%	42%	32%	37%	27%	26%	32%	38%	30%	35%
Online articles	38%	42%	34%	44%	49%	37%	31%	37%	43%	41%	20%	31%	33%
Online videos (e.g., YouTube, etc.)	42%	51%	42%	40%	45%	36%	33%	29%	46%	29%	20%	32%	30%
Social media (e.g., Twitter, Facebook, Instagram, etc.)	38%	60%	31%	46%	50%	38%	31%	28%	50%	26%	17%	33%	26%
Travel planning apps	31%	46%	27%	22%	34%	26%	33%	12%	16%	39%	22%	20%	30%
Films/movies	23%	40%	21%	16%	30%	20%	24%	27%	39%	18%	17%	22%	24%
News-related shows, websites, or publications	23%	27%	22%	20%	29%	23%	22%	26%	37%	19%	18%	20%	22%
Travel agents/travel advisors	26%	30%	16%	27%	21%	18%	21%	13%	24%	8%	17%	14%	19%
Blogs	15%	29%	7%	11%	13%	16%	15%	14%	26%	13%	9%	14%	15%
Podcasts	21%	28%	13%	11%	26%	25%	17%	12%	21%	11%	11%	10%	16%
Email newsletters	17%	32%	7%	30%	21%	19%	15%	8%	14%	13%	14%	10%	16%
Influencers	23%	43%	15%	20%	26%	13%	16%	9%	28%	9%	5%	11%	15%
Radio programs	13%	22%	11%	5%	12%	16%	12%	7%	18%	9%	5%	2%	14%
Other	1%	0%	3%	5%	0%	3%	4%	0%	2%	1%	4%	3%	3%



Potential Reno Tahoe visitors most often look for travel inspiration by word of mouth through friends/family (59%), followed by online search (47%), travel review sites (36%), and friends/family via social media (33%). Just under one in three use official destination websites for travel inspiration (31%).

Those who are interested in visiting Reno Tahoe in the next year are slightly less likely to rely on word of mouth (54%) and are more likely to use online search (51%) and travel review sites (48%).

Figure 12: Travel Inspiration Sources (Potential Visitors)



Question: Where do you look for travel inspiration? Base: Not past 12-month Reno Tahoe visitors, 800 respondents.

# Travel Inspiration by Segment

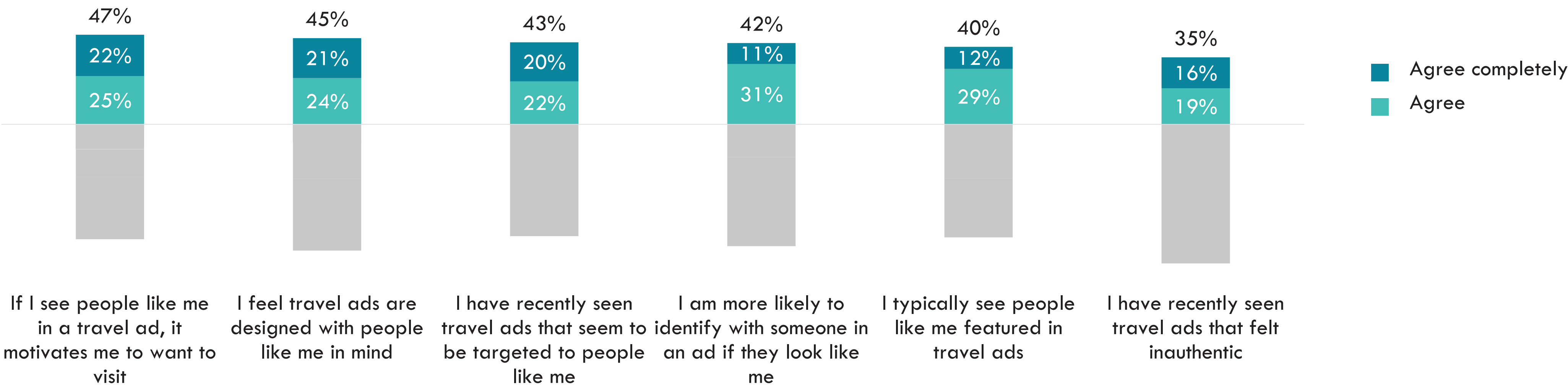
POTENTIAL VISITORS

	Audience Segments						Generational Segments				Reno Travel Segments		
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gen Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
Friends/family via direct contact	50%	70%	52%	61%	46%	55%	89%	55%	58%	58%	59%	58%	54%
Online searches	47%	52%	47%	56%	42%	48%	35%	50%	51%	45%	41%	49%	51%
Travel review sites (e.g., TripAdvisor, etc.)	40%	38%	42%	35%	39%	39%	28%	31%	37%	40%	43%	35%	48%
Friends/family via social media	35%	44%	32%	58%	33%	48%	55%	37%	39%	28%	31%	34%	49%
Official destination websites	36%	36%	25%	30%	42%	30%	12%	32%	34%	31%	33%	30%	30%
Online videos (e.g., YouTube, etc.)	40%	50%	29%	31%	47%	37%	55%	40%	26%	18%	23%	28%	40%
TV—streaming or broadcast	25%	26%	18%	17%	25%	20%	32%	29%	25%	21%	28%	23%	30%
Social media (e.g., Twitter, Facebook, Instagram, etc.)	36%	54%	27%	35%	43%	41%	50%	42%	31%	12%	20%	26%	47%
Online articles	27%	31%	29%	22%	23%	19%	24%	21%	26%	22%	24%	22%	31%
Online travel agencies (e.g., Expedia, Priceline, etc.)	33%	28%	26%	31%	34%	27%	13%	33%	21%	18%	24%	22%	40%
Magazine articles—print or online	22%	19%	20%	13%	24%	20%	0%	11%	27%	26%	32%	18%	39%
Films/movies	22%	23%	17%	25%	19%	16%	29%	26%	17%	15%	20%	18%	31%
Travel planning apps	16%	17%	14%	26%	20%	15%	1%	19%	10%	13%	15%	13%	18%
News-related shows, websites, or publications	18%	15%	16%	11%	13%	9%	3%	11%	15%	15%	18%	12%	19%
Travel agents/travel advisors	17%	16%	17%	15%	16%	13%	9%	18%	10%	15%	21%	12%	22%
Email newsletters	8%	4%	16%	8%	6%	5%	0%	5%	3%	14%	11%	8%	12%
Influencers	13%	25%	7%	9%	9%	9%	19%	15%	5%	2%	4%	7%	7%
Podcasts	11%	11%	9%	5%	14%	8%	14%	10%	4%	5%	7%	6%	14%
Blogs	12%	12%	9%	9%	9%	7%	2%	11%	5%	4%	9%	5%	10%
Radio programs	10%	7%	7%	2%	10%	4%	10%	10%	3%	3%	7%	4%	5%
Other	0%	0%	5%	0%	0%	0%	0%	1%	2%	7%	3%	4%	0%



Just under half of past 12-month Reno Tahoe visitors agree that if they see people like them in an ad, it motivates them to want to visit (47%) and/or they feel like travel ads are designed with people like them in mind (45%). Four in ten also agree that they have recently seen ads that seem to be targeted to them (43%), are more likely to identify with someone who looks like them in an ad (42%), and/or typically see people like them featured in ads (40%). One third said they have recently seen ads that felt inauthentic (35%).

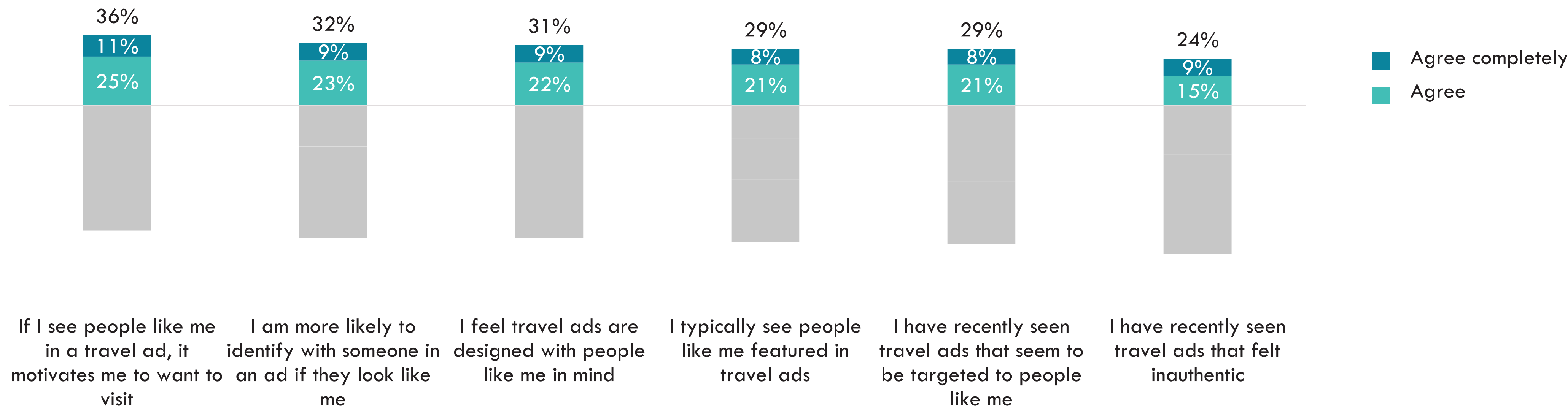
Figure 13: Representation in Advertising (Recent Visitors)



Question: Thinking about any travel advertising you have seen recently, how much do you agree or disagree with the following statements? Base: Past 12-month visitors, 402 respondents.

Around one third of potential Reno Tahoe visitors agree that if they see people like them in an ad, it motivates them to want to visit (36%), are more likely to identify with someone in an ad that looks like them (32%), and/or they feel travel ads are designed with people like them in mind (31%). Just one quarter said they have recently seen ads that felt inauthentic (24%).

Figure 14: Representation in Advertising (Potential Visitors)



Question: Thinking about any travel advertising you have seen recently, how much do you agree or disagree with the following statements? Base: Not past 12-month Reno Tahoe visitors, 800 respondents.



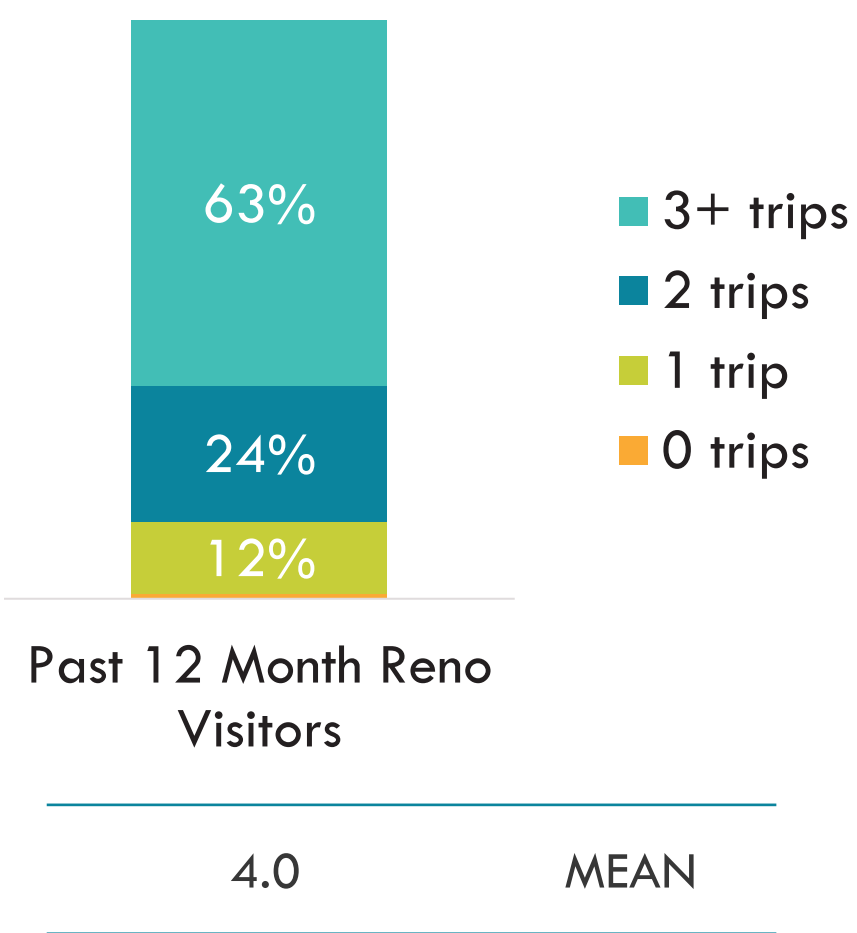
A group of four skiers are riding a chairlift up a mountain. They are wearing colorful ski gear and helmets. The chairlift is suspended by cables and has a metal frame. In the background, there is a large lake and snow-capped mountains under a cloudy sky. The foreground is filled with dense evergreen trees. The text "PAST & PLANNED TRAVEL" is overlaid in the center of the image.

# PAST & PLANNED TRAVEL

# Overnight Leisure Trips Past 12 Months

On average, past 12-month Reno Tahoe visitors took 4.0 overnight leisure trips in the past year. Digital Junkies (4.8 trips) and Millennials (4.6 trips) reported the highest average number of trips in the past 12-month period, while Family Travelers (3.7 trips) and Boomers (3.6 trips) were lowest.

Figure 15: Overnight Leisure Trips Past 12 Months (Recent Visitors)



Audience Segments							Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
3+	64%	70%	69%	67%	63%	67%	63%	57%	71%	64%	60%	62%	64%
2	24%	26%	19%	27%	27%	22%	27%	16%	27%	25%	19%	25%	23%
1	11%	4%	9%	5%	10%	10%	9%	27%	2%	11%	20%	11%	13%
0	1%	0%	2%	0%	1%	1%	1%	1%	1%	0%	1%	3%	0%
Mean	3.9	4.8	4.0	4.1	3.9	3.7	3.9	4.1	4.6	4.2	3.6	3.9	4.1

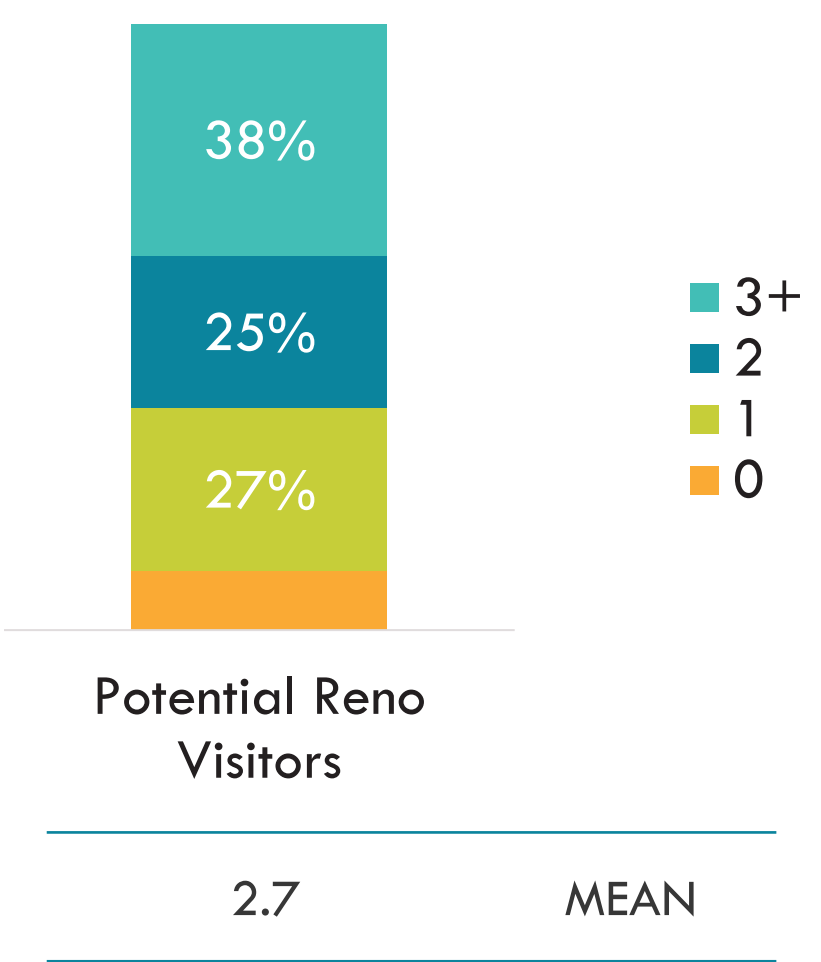
Question: How many overnight leisure trips have you taken of at least 50 miles from home in the past 12 months? Base: Past 12-month Reno visitors, 397 respondents.



# Overnight Leisure Trips Past 12 Months

On average, potential Reno Tahoe visitors took 2.7 overnight leisure trips in the past year. Those who are interested in visiting Reno Tahoe in the next 12 months have a slightly higher travel rate, at 3.0 overnight leisure trips on average in the past year.

Figure 16: Overnight Leisure Trips Past 12 Months (Potential Visitors)



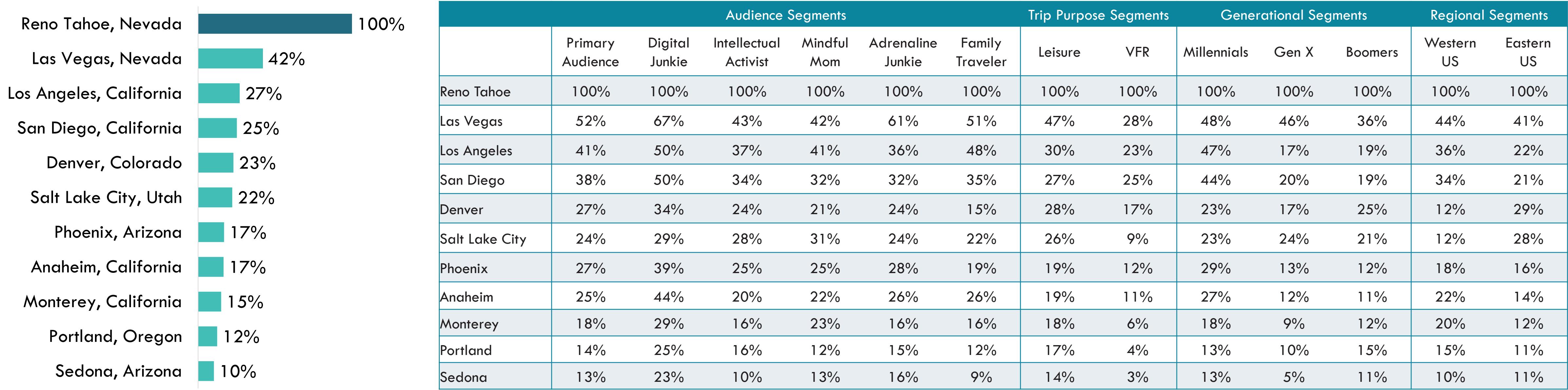
Audience Segments							Generational Segments				Regional Segments		
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gen Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
3+	45%	46%	44%	40%	56%	45%	52%	41%	33%	38%	55%	33%	49%
2	29%	30%	26%	35%	16%	34%	12%	33%	31%	19%	25%	25%	25%
1	23%	23%	22%	25%	23%	21%	34%	25%	23%	29%	15%	30%	21%
0	4%	1%	8%	0%	5%	1%	2%	1%	13%	14%	6%	11%	4%
Mean	3.0	3.3	3.3	2.9	3.5	3.2	3.3	3.0	2.5	2.7	3.8	2.4	3.0

Question: How many overnight leisure trips have you taken of at least 50 miles from home in the past 12 months? Base: Not past 12-month Reno Tahoe visitors, 789 respondents.

# Destinations Visited Past 12 Months

In addition to Reno Tahoe, past 12-month visitors also traveled to Las Vegas (42%), Los Angeles (27%), San Diego (25%), Denver (23%), and Salt Lake City (22%) in the past year. Digital Junkies were much more likely to have also visited Las Vegas (67%), Las Angeles (50%), and/or San Diego (50%). Adrenaline Junkies were also reported higher Las Vegas visitation rates (61%). For Family Travelers, the most popular destinations included Las Vegas (51%) and/or Los Angeles (48%). Within the generational segments, Millennials were much more likely to have also visited Los Angeles (47%) and San Diego (44%) compared to Gen X and Boomers.

Figure 17: Destinations Visited Past 12 Months (Recent Visitors)



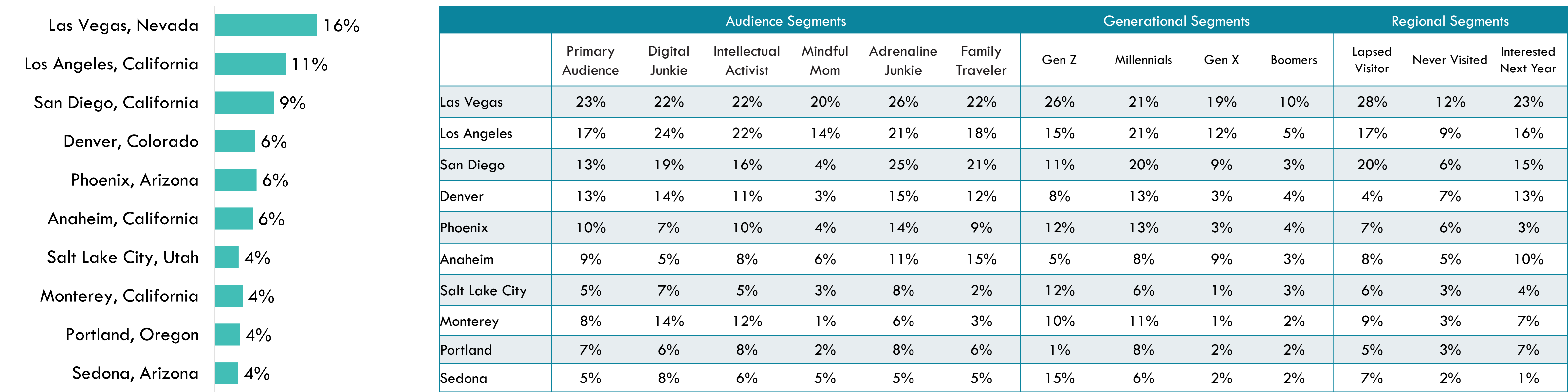
Question: Which of the following destinations have you visited in the past 12 months? Include both day and overnight trips. Base: Past 12-month Reno visitors, 402 respondents.



# Destinations Visited Past 12 Months

The top destinations potential visitors traveled to in the last 12 months included Las Vegas (16%), Los Angeles (11%), and San Diego (9%). Those who are interested in visiting Reno Tahoe in the next year report a higher visitation rate to competitors, including Las Vegas (23%), Los Angeles (16%), San Diego (15%), and Denver (13%).

Figure 18: Destinations Visited Past 12 Months (Potential Visitors)

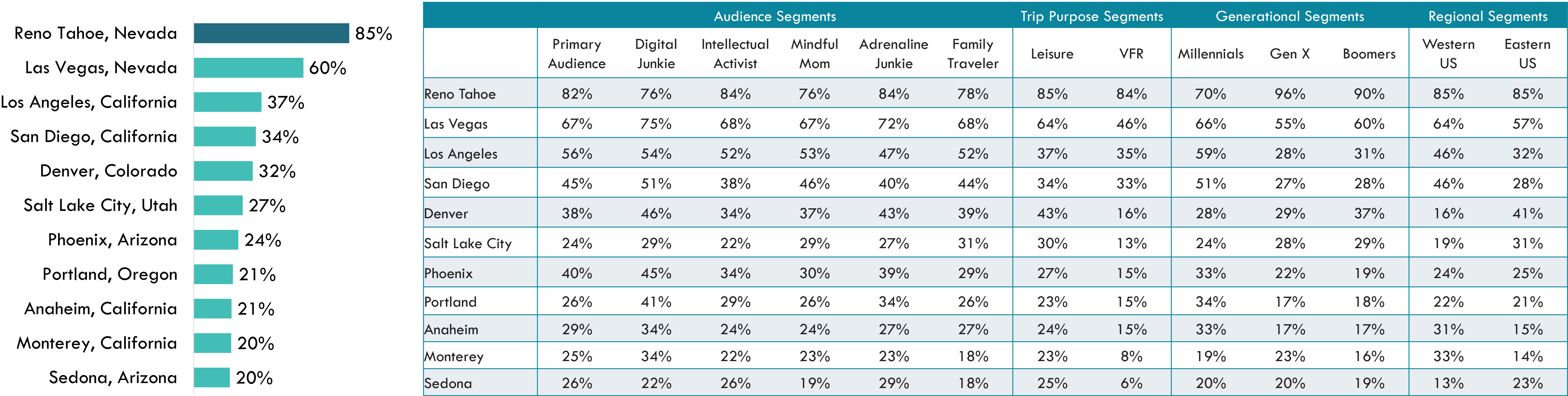


Question: Which of the following destinations have you visited in the past 12 months? Include both day and overnight trips. Base: Not past 12-month Reno visitors, 800 respondents.

# Destinations Visited for Overnight Leisure Past 5 Years

Of those who visited Reno Tahoe in the past 12 months (for a day or overnight trip, including any trip purpose), 85 percent had previously stayed in the area overnight for leisure in the past five years. This was followed by Las Vegas (60%). Around one third have also visited L.A. (37%), San Diego (34%), and Denver (32%) overnight for leisure in the past five years. Gen X (96%) and Boomers (90%) report the highest past five year overnight leisure visitation rates to Reno Tahoe.

Figure 19: Destinations Visited for Overnight Leisure Past Five Years (Recent Visitors)



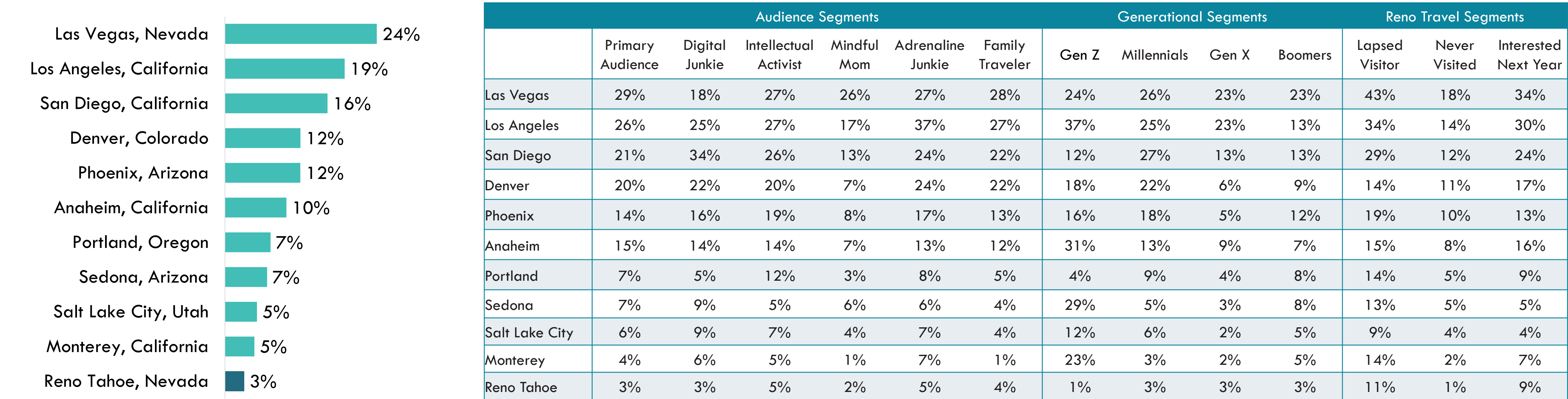
Question: Which of the following destinations have you visited overnight for leisure in the past five years? Base: Past 12-month Reno visitors, 402 respondents.



# Destinations Visited for Overnight Leisure Past 5 Years

Among potential Reno Tahoe visitors, 24 percent have visited Las Vegas overnight for leisure in the past five years, followed by Los Angeles (19%), San Diego (16%), Denver (12%), and Phoenix (12%). Those who are interested in visiting Reno Tahoe in the next year are more likely to have visited major competitors in the past five years, including Las Vegas (34%), Los Angeles (30%), and San Diego (24%).

Figure 20: Destinations Visited for Overnight Leisure Past Five Years (Potential Visitors)



Question: Which of the following destinations have you visited overnight for leisure in the past five years? Base: Not past 12-month Reno visitors, 800 respondents.

# Top of Mind Destinations Next 5 Years

When asked what are the top five destinations recent Reno Tahoe travelers most want to visit in the next five years, Las Vegas, Hawaii, and New York rise to the top. This is followed closely by San Diego, Mexico, Florida, Lake Tahoe, and Reno. Many recent Reno Tahoe visitors are interested in long haul destinations, including Alaska, London, Italy, and Paris.

Figure 20a: Top of Mind Destinations Interested in Visiting Next Five Years (Recent Visitors)



Question: Which of the following destinations are you interested in visiting overnight for leisure in the next 12 months? Base: Past 12-month Reno visitors, 402 respondents.



# Top of Mind Destinations Next 5 Years

When asked what are the top five destinations potential travelers most want to visit in the next five years, Hawaii, Florida, Las Vegas, and New York rise to the top. This is followed by San Diego, Mexico, and California. A smaller but sizeable percentage are interested in long haul destinations, including Italy, Greece, Japan, Paris, Australia, and Alaska.

Figure 20b: Top of Mind Destinations Interested in Visiting Next Five Years (Potential Visitors)

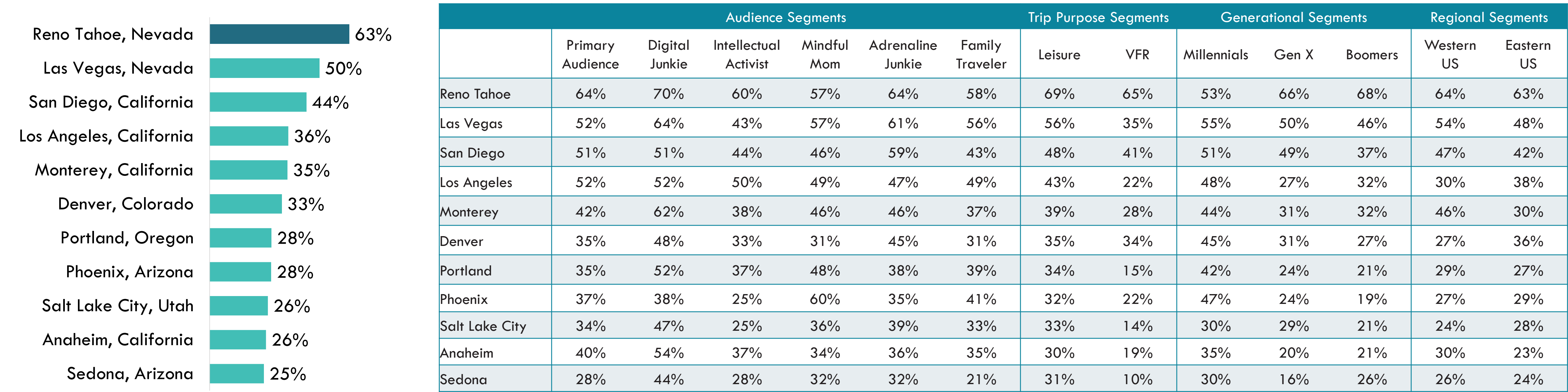


Question: What are the top five destinations you most want to visit in the next two years? Base: Base: Not past 12-month Reno visitors, 800 respondents.

# Interested in Visiting for Overnight Leisure Next 12 Months

Nearly two thirds of recent Reno Tahoe visitors are also interested in visiting Reno overnight for leisure in the next year. This is followed by Las Vegas (50%), San Diego (44%), Los Angeles (36%), and Monterey (35%). Within the audience segments, Digital (70%) and Adrenaline (64%) Junkies are most interested in an overnight leisure Reno Tahoe trip in the next 12 months. Within the generational segments, Boomers (68%) and Gen X (66%) are much more interested in visiting Reno Tahoe overnight for leisure in the year ahead compared to Millennials (53%). Interest in Reno Tahoe among the past 12-month Western and Eastern U.S. visitors is relatively evenly split, at 63-64 percent.

Figure 21: Interested in Visiting for Overnight Leisure Next 12 Months (Recent Visitors)



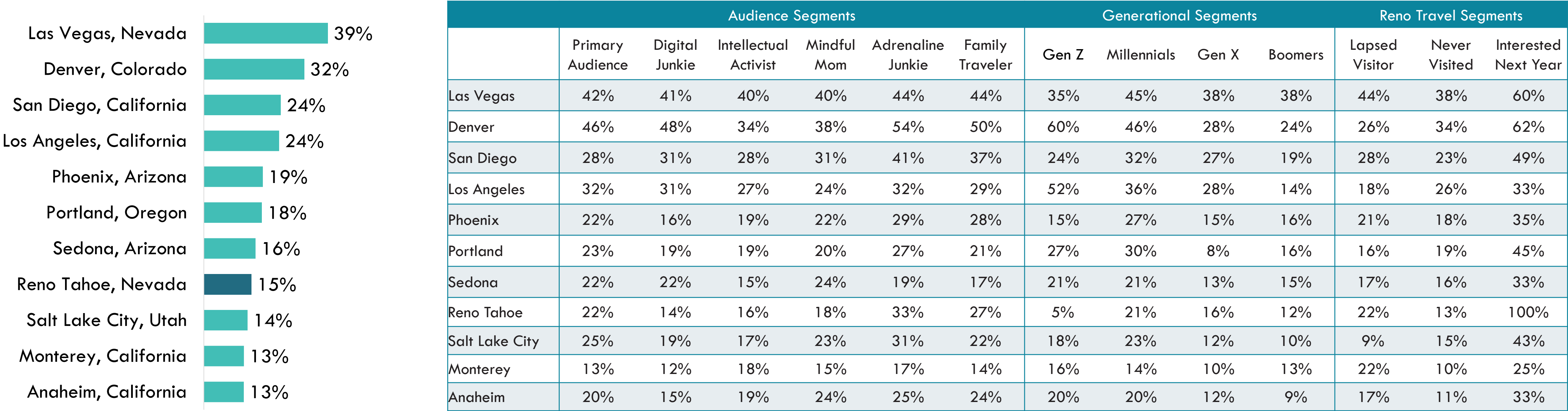
Question: Which of the following destinations are you interested in visiting overnight for leisure in the next 12 months? Base: Past 12-month Reno visitors, 402 respondents.



# Interested in Visiting for Overnight Leisure Next 12 Months

Among potential Reno Tahoe travelers, four in ten are interested in visiting Las Vegas overnight for leisure in the next 12 months (39%), followed by Denver (32%), San Diego (24%), and Los Angeles (24%). Those who are interested in visiting Reno Tahoe also expressed high levels of interest in Denver (62%), Las Vegas (60%), and San Diego (49%).

Figure 22: Interested in Visiting for Overnight Leisure Next 12 Months (Potential Visitors)

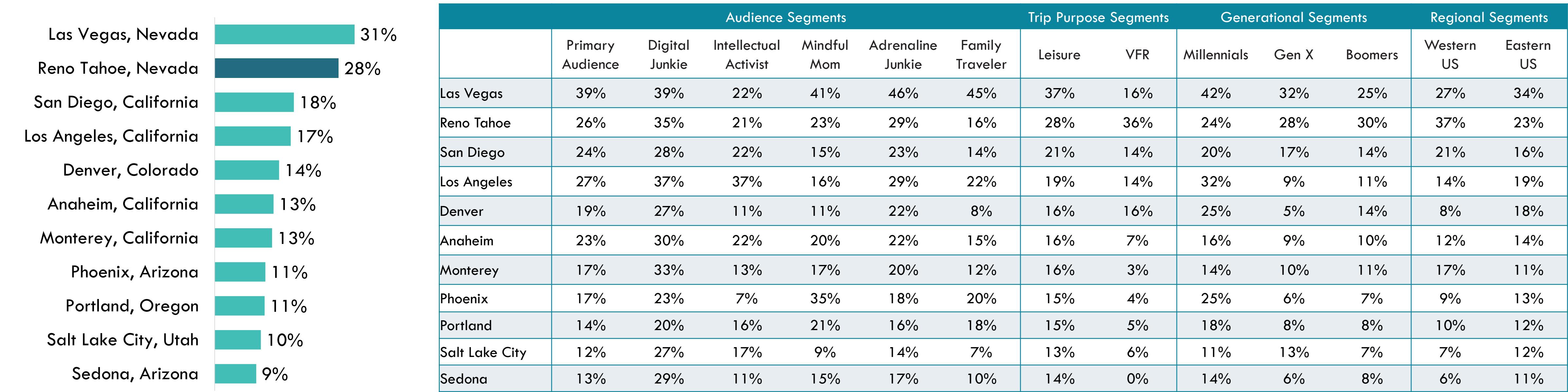


Question: Which of the following destinations are you interested in visiting overnight for leisure in the next 12 months? Base: Not past 12-month Reno visitors, 800 respondents.

# Interested in Visiting for Overnight Leisure Next 6 Months

More than one quarter of past 12-month Reno Tahoe visitors are planning to return in the next six months (28%). This is slightly behind Las Vegas (31%) and ahead of every other competitor. Within the audience segments, Digital (35%) and Adrenaline (29%) Junkies are most likely to visit Reno Tahoe trip in the next six months. Within the generational segments, Boomers (30%) report the highest travel intent, followed by Gen X (28%). Western U.S. residents are much more likely to visit in the next six months (37%) compared to Eastern U.S. (23%).

Figure 23: Interested in Visiting for Overnight Leisure Next 6 Months (Recent Visitors)



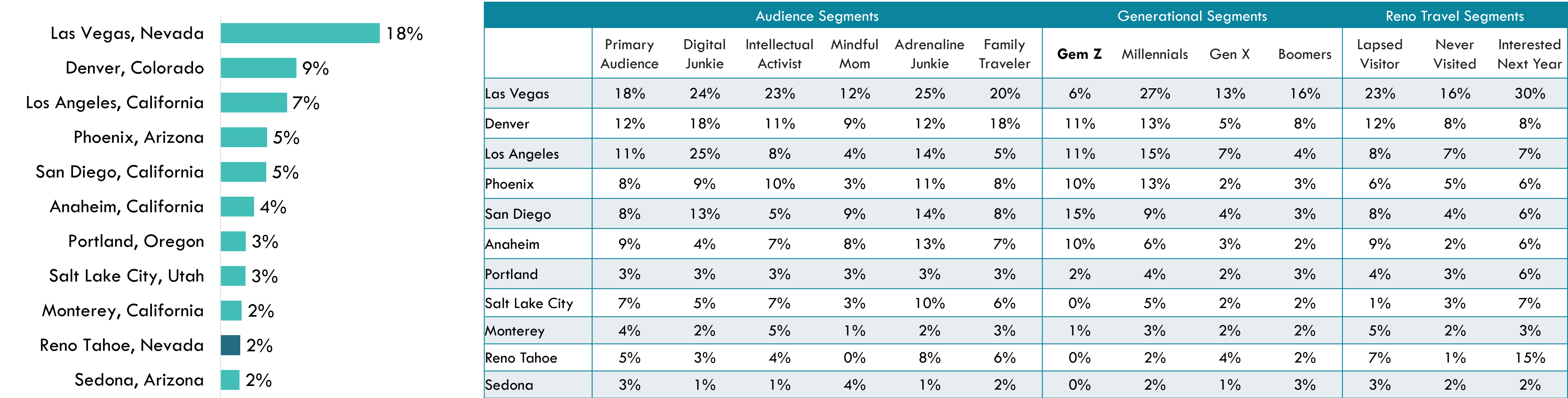
Question: Which of the following destinations are you interested in visiting overnight for leisure in the next 12 months? Base: Past 12-month Reno visitors, 402 respondents.



# Interested in Visiting for Overnight Leisure Next 6 Months

Just two percent of potential travelers are planning to visit Reno Tahoe in the next six months. This percentage is much higher among those who are already interested in visiting the destination, at 15 percent.

Figure 24: Interested in Visiting for Overnight Leisure Next 6 Months (Potential Visitors)



Question: Which of the following destinations are you planning to visit overnight for leisure in the next 6 months? Base: Not past 12-month Reno visitors, 800 respondents.



# TRAVELER MINDSET





Over eight in ten past 12-month Reno Tahoe visitors say they enjoy trying new things such as food/experiences/activities (86%) and/or prefer experiences where they can really get a sense for the essence of a place (81%). More than seven in ten also agree that they seek out exciting and stimulating experiences when they travel (78%), travel to open their mind to new cultures and experiences (76%), and/or being outside and connecting with nature motivates them to travel (71%).

This mindset rates even higher among Reno Tahoe’s Primary audience, with 97 percent preferring experiences where they can really get a sense of a place, 96 percent seeking out exciting and stimulating experiences, 95 percent traveling to open their mind to new cultures/experiences, and 93 percent enjoying trying new things.

Figure 25: Personal Statement Agreement—Top 2 Box (Recent Visitors)



Question: How much do each of the following statements describe you? Base: Past 12-month Reno visitors, 402 respondents.

# Personal Travel Statements by Segment

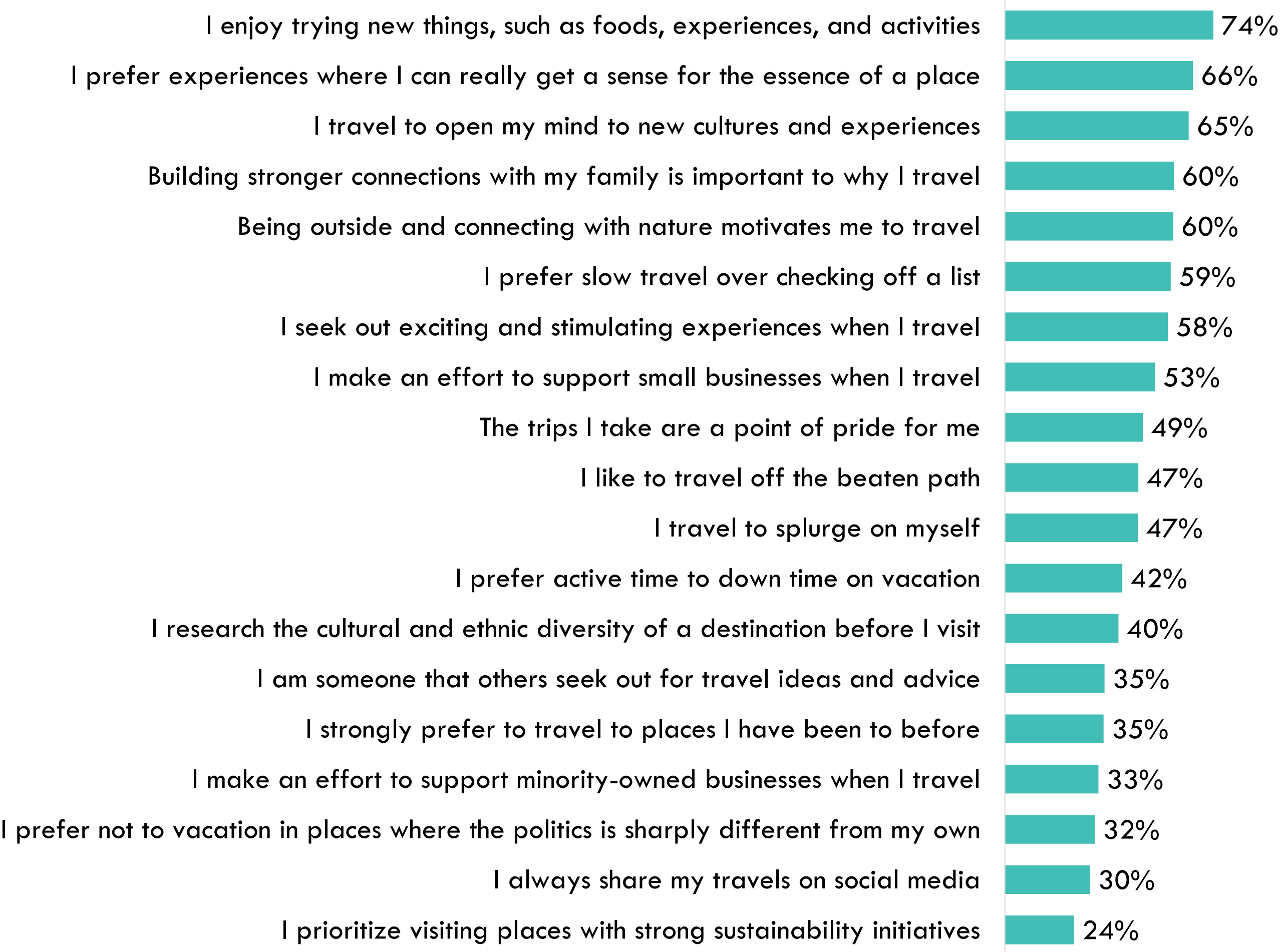
	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
Top 2 Box	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
I enjoy trying new things, such as foods, experiences, and activities	93%	92%	84%	90%	94%	90%	91%	68%	84%	90%	85%	84%	87%
I prefer experiences where I can really get a sense for the essence of a place	97%	92%	91%	86%	97%	90%	86%	77%	87%	82%	77%	74%	85%
I seek out exciting and stimulating experiences when I travel	96%	94%	89%	91%	100%	89%	81%	73%	87%	76%	73%	71%	81%
I travel to open my mind to new cultures and experiences	95%	93%	92%	89%	89%	87%	81%	65%	84%	75%	73%	71%	79%
Being outside and connecting with nature motivates me to travel	88%	92%	86%	86%	100%	90%	76%	65%	86%	73%	64%	69%	72%
I make an effort to support small businesses when I travel	93%	84%	88%	76%	84%	84%	66%	67%	73%	69%	56%	60%	67%
Building stronger connections with my family is important to why I travel	85%	81%	70%	100%	82%	100%	66%	61%	77%	73%	52%	60%	67%
I like to travel off the beaten path	84%	79%	79%	71%	84%	74%	66%	71%	69%	70%	59%	59%	67%
The trips I take are a point of pride for me	82%	86%	78%	78%	88%	76%	63%	66%	78%	72%	45%	55%	64%
I research the cultural and ethnic diversity of a destination before I visit	84%	85%	87%	79%	80%	80%	61%	58%	71%	58%	51%	50%	64%
I prefer slow travel over checking off a list	62%	63%	68%	52%	63%	43%	55%	68%	56%	55%	61%	54%	61%
I travel to splurge on myself	72%	83%	72%	71%	71%	72%	62%	51%	68%	59%	49%	55%	59%
I prefer active time to down time on vacation	78%	89%	70%	66%	100%	77%	61%	52%	75%	55%	49%	50%	62%
I am someone that others seek out for travel ideas and advice	76%	86%	67%	77%	79%	72%	56%	41%	63%	58%	39%	44%	57%
I always share my travels on social media	59%	74%	44%	62%	64%	64%	45%	36%	55%	45%	29%	38%	44%
I make an effort to support minority-owned businesses when I travel	82%	71%	66%	60%	61%	52%	38%	43%	50%	32%	35%	41%	37%
I strongly prefer to travel to places I have been to before	56%	60%	39%	47%	50%	44%	40%	29%	45%	41%	31%	36%	39%
I prioritize visiting places with strong sustainability initiatives	78%	59%	56%	69%	56%	66%	38%	23%	54%	33%	26%	31%	37%
I prefer not to vacation in places where the politics is sharply different from my own	35%	29%	44%	38%	31%	44%	25%	37%	25%	25%	25%	28%	26%



Three quarters of potential Reno Tahoe visitors say they enjoy trying new things (74%), while two thirds prefer experiences where they can get a sense of a place (66%) and/or travel to open their mind to new cultures/experiences (65%). A further six in ten say that building connections with family is important to why they travel and/or being outside and connecting with nature motivates them to travel (60% each).

Those who are interested in visiting Reno Tahoe in the next year are more likely to enjoy trying new things (86%), travel to open their mind to new experiences/cultures (84%) and prefer experiences where they can get a sense of the essence of a place (79%). Travel Intenders are also more likely to travel to build stronger connections with their family and/or travel to be outside and connect with nature (75% each).

Figure 26: Personal Statement Agreement—Top 2 Box (Potential Visitors)



Question: How much do each of the following statements describe you? Base: Not past 12-month Reno visitors, 800 respondents.

# Personal Travel Statements by Segment

POTENTIAL VISITORS

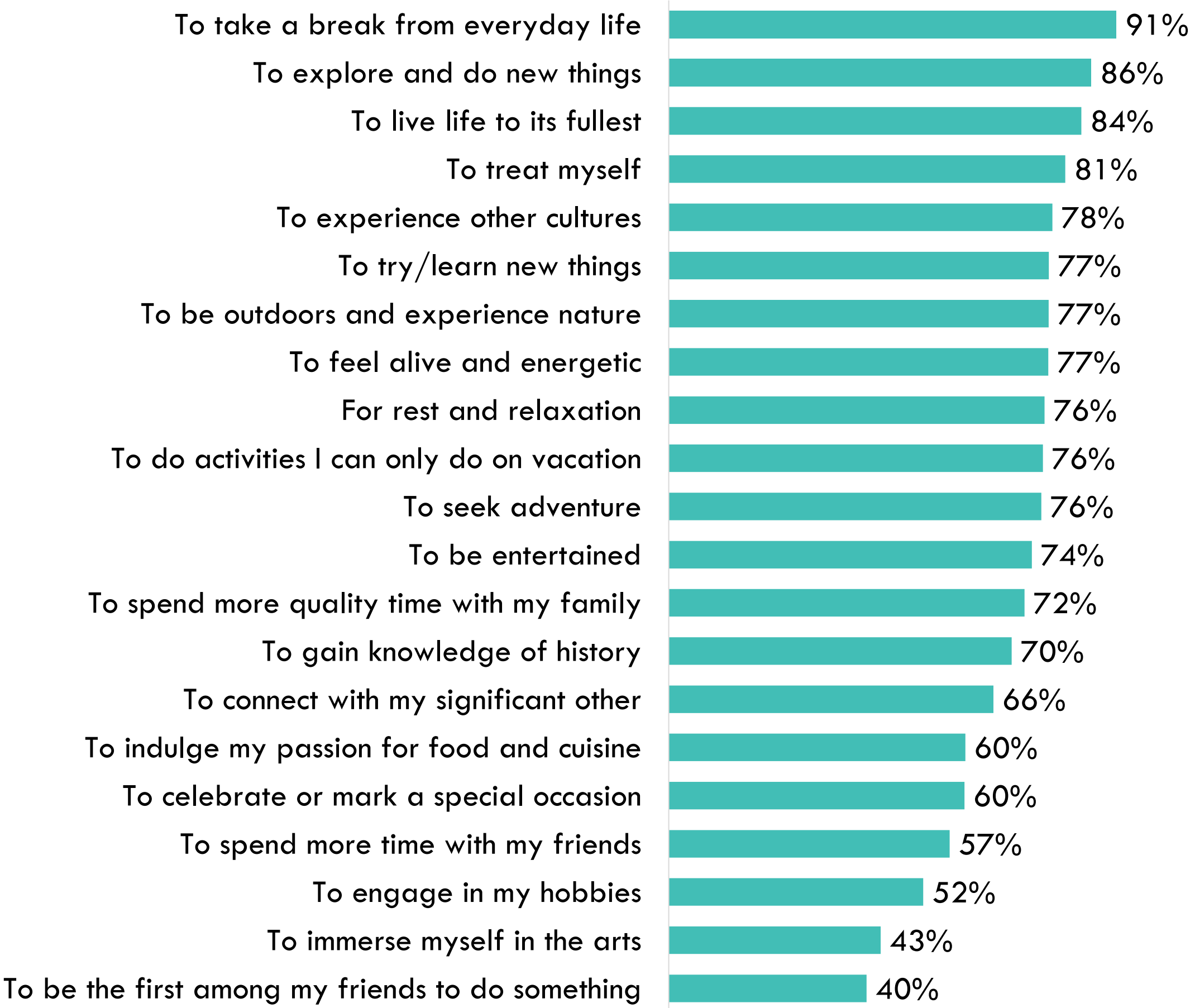
Top 2 Box	Audience Segments						Generational Segments				Reno Travel Segments		
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gem Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
I enjoy trying new things, such as foods, experiences, and activities	92%	89%	83%	82%	93%	85%	85%	84%	73%	68%	77%	73%	86%
I prefer experiences where I can really get a sense for the essence of a place	83%	72%	82%	75%	82%	75%	87%	73%	65%	63%	64%	67%	79%
I travel to open my mind to new cultures and experiences	89%	80%	79%	75%	82%	78%	80%	77%	69%	55%	70%	63%	84%
Building stronger connections with my family is important to why I travel	74%	65%	67%	100%	71%	100%	37%	65%	62%	58%	60%	60%	75%
Being outside and connecting with nature motivates me to travel	89%	71%	74%	66%	100%	73%	45%	71%	62%	54%	62%	59%	75%
I prefer slow travel over checking off a list	69%	55%	61%	61%	61%	56%	49%	47%	71%	60%	62%	58%	53%
I seek out exciting and stimulating experiences when I travel	89%	63%	64%	69%	100%	67%	57%	73%	65%	47%	59%	57%	75%
I make an effort to support small businesses when I travel	82%	68%	61%	71%	74%	61%	61%	52%	57%	51%	52%	54%	56%
The trips I take are a point of pride for me	69%	68%	66%	55%	69%	62%	72%	60%	48%	42%	55%	47%	61%
I like to travel off the beaten path	71%	53%	53%	57%	73%	56%	36%	50%	61%	40%	57%	44%	54%
I travel to splurge on myself	66%	61%	57%	55%	62%	55%	39%	58%	50%	40%	45%	48%	68%
I prefer active time to down time on vacation	60%	50%	51%	53%	100%	61%	50%	58%	45%	31%	42%	41%	62%
I research the cultural and ethnic diversity of a destination before I visit	69%	54%	66%	45%	65%	54%	52%	53%	45%	30%	41%	40%	46%
I am someone that others seek out for travel ideas and advice	60%	53%	50%	54%	55%	54%	56%	49%	44%	22%	35%	35%	50%
I strongly prefer to travel to places I have been to before	43%	30%	37%	29%	36%	28%	42%	37%	38%	32%	34%	35%	34%
I make an effort to support minority-owned businesses when I travel	79%	58%	54%	47%	55%	45%	31%	47%	36%	25%	35%	33%	33%
I prefer not to vacation in places where the politics is sharply different from my own	40%	41%	53%	26%	33%	30%	33%	37%	27%	31%	31%	32%	40%
I always share my travels on social media	54%	65%	50%	47%	52%	50%	53%	49%	31%	18%	30%	30%	42%
I prioritize visiting places with strong sustainability initiatives	63%	28%	53%	41%	52%	44%	10%	41%	29%	15%	23%	25%	38%



More than nine in ten past 12-month Reno Tahoe visitors say they travel to take a break from everyday life (91%), while 86 percent travel to explore and do new things, 84 percent to live life to its fullest, and 81 percent to treat themselves. A further three quarters travel to experience other cultures (78%), to try/learn new things (77%), to be outdoors (77%), to feel alive/energetic (77%), for rest/relaxation (76%), to do activities they can only do on vacation (76%), and to seek adventure (76%).

Among the top travel motivators, Reno Tahoe’s Primary past visitor audience reports an even stronger agreement level, with more than nine in ten traveling to take a break from life (98%), to explore/do new things (94%), to experience other cultures (94%), to be outdoors (93%), and to seek adventure (93%).

Figure 27: Travel Motivators Agreement—Top 2 Box (Recent Visitors)



Question: Why do you travel ? Base: Past 12-month Reno visitors, 402 respondents.

# Travel Motivators by Segment

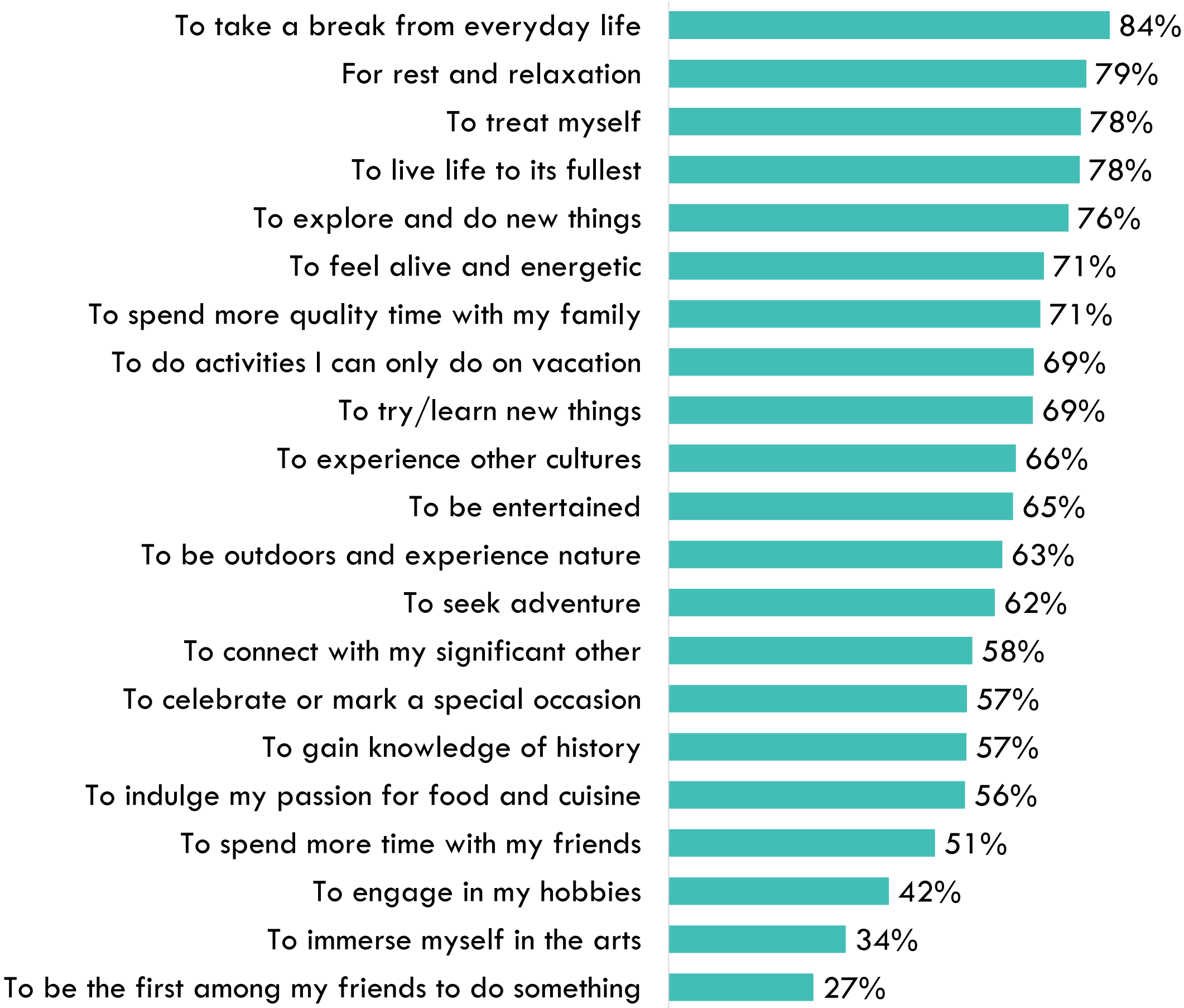
Top 2 Box	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
To take a break from everyday life	98%	95%	97%	94%	96%	97%	92%	88%	94%	89%	91%	93%	90%
To explore and do new things	94%	96%	94%	85%	100%	92%	91%	80%	90%	83%	86%	88%	85%
To live life to its fullest	92%	96%	89%	85%	98%	88%	86%	85%	85%	83%	84%	86%	83%
To treat myself	85%	89%	75%	84%	82%	80%	83%	70%	89%	77%	78%	80%	81%
To experience other cultures	94%	92%	92%	82%	90%	84%	82%	71%	87%	69%	80%	74%	80%
To try/learn new things	91%	92%	90%	87%	94%	93%	85%	64%	86%	77%	73%	76%	78%
To be outdoors and experience nature	93%	91%	88%	76%	96%	86%	76%	82%	80%	81%	73%	74%	79%
To feel alive and energetic	91%	92%	82%	80%	97%	89%	81%	76%	88%	78%	72%	77%	77%
For rest and relaxation	86%	87%	84%	90%	88%	83%	83%	71%	83%	78%	73%	82%	74%
To do activities I can only do on vacation	89%	85%	84%	88%	94%	92%	84%	62%	86%	81%	66%	76%	76%
To seek adventure	93%	93%	85%	81%	98%	89%	80%	66%	88%	82%	64%	73%	77%
To be entertained	89%	89%	80%	85%	84%	82%	80%	58%	82%	73%	70%	71%	76%
To spend more quality time with my family	82%	87%	79%	95%	83%	97%	77%	69%	76%	77%	65%	70%	74%
To gain knowledge of history	86%	84%	82%	71%	86%	72%	74%	63%	69%	74%	67%	67%	71%
To connect with my significant other	81%	83%	70%	84%	82%	89%	71%	56%	73%	73%	58%	67%	66%
To indulge my passion for food and cuisine	85%	87%	70%	74%	77%	75%	66%	45%	80%	55%	53%	58%	62%
To celebrate or mark a special occasion	78%	93%	60%	73%	76%	71%	60%	64%	71%	61%	52%	60%	60%
To spend more time with my friends	77%	82%	66%	78%	76%	82%	61%	49%	67%	64%	45%	50%	61%
To engage in my hobbies	73%	82%	58%	77%	76%	73%	57%	33%	72%	60%	35%	49%	53%
To immerse myself in the arts	70%	73%	55%	69%	63%	68%	46%	31%	67%	52%	24%	41%	44%
To be the first among my friends to do something	68%	76%	54%	71%	67%	65%	42%	29%	56%	47%	23%	30%	46%



Eight in ten potential Reno Tahoe visitors say they travel to take a break from everyday life (84%), while 79 percent travel for rest/relaxation, 78 percent to treat themselves, and 78 percent to live life to its fullest. More than seven in ten travel to explore/do new things (78%), to feel alive/energetic (71%), and to spend quality time with family (71%).

Those who are interested in visiting Reno Tahoe in the next 12 months are more likely to travel to take a break from everyday life (96%), to live life to its fullest (91%), for rest/relaxation (87%), and/or to treat themselves (87%).

Figure 28: Travel Motivators Agreement—Top 2 Box (Potential Visitors)



Question: Why do you travel ? Base: Not past 12-month Reno visitors, 800 respondents.

# Travel Motivators by Segment

POTENTIAL VISITORS

Top 2 Box	Audience Segments						Generational Segments				Reno Travel Segments		
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gem Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
To take a break from everyday life	91%	90%	87%	97%	95%	97%	92%	92%	88%	76%	81%	85%	96%
For rest and relaxation	84%	79%	82%	89%	81%	85%	87%	80%	85%	76%	83%	78%	87%
To treat myself	91%	91%	83%	88%	89%	87%	91%	88%	73%	75%	75%	79%	87%
To live life to its fullest	94%	88%	85%	92%	98%	88%	80%	86%	79%	73%	81%	77%	91%
To explore and do new things	91%	90%	84%	88%	92%	82%	94%	87%	82%	66%	81%	74%	81%
To feel alive and energetic	94%	90%	77%	80%	95%	81%	89%	84%	73%	63%	72%	71%	81%
To spend more quality time with my family	80%	79%	74%	95%	82%	91%	70%	68%	78%	68%	73%	70%	79%
To do activities I can only do on vacation	80%	74%	73%	78%	78%	81%	74%	76%	70%	65%	68%	70%	81%
To try/learn new things	92%	86%	83%	82%	90%	85%	86%	84%	70%	60%	73%	68%	84%
To experience other cultures	89%	84%	77%	73%	91%	77%	60%	73%	71%	61%	75%	63%	79%
To be entertained	78%	80%	63%	63%	77%	62%	91%	76%	75%	53%	65%	66%	71%
To be outdoors and experience nature	90%	86%	74%	79%	94%	77%	66%	73%	66%	57%	67%	62%	75%
To seek adventure	89%	74%	74%	77%	90%	80%	80%	80%	70%	47%	63%	62%	77%
To connect with my significant other	67%	57%	57%	84%	76%	82%	41%	68%	68%	49%	59%	57%	64%
To celebrate or mark a special occasion	76%	71%	78%	70%	75%	74%	87%	70%	59%	46%	61%	55%	71%
To gain knowledge of history	79%	60%	69%	72%	81%	73%	48%	65%	56%	53%	67%	54%	65%
To indulge my passion for food and cuisine	78%	67%	66%	72%	74%	66%	59%	71%	57%	48%	52%	57%	68%
To spend more time with my friends	66%	60%	55%	48%	62%	51%	66%	60%	53%	43%	57%	49%	56%
To engage in my hobbies	71%	62%	56%	52%	75%	55%	57%	68%	42%	27%	43%	42%	55%
To immerse myself in the arts	59%	50%	54%	54%	51%	52%	38%	54%	40%	20%	37%	33%	43%
To be the first among my friends to do something	48%	37%	41%	35%	53%	50%	42%	48%	31%	14%	29%	27%	51%



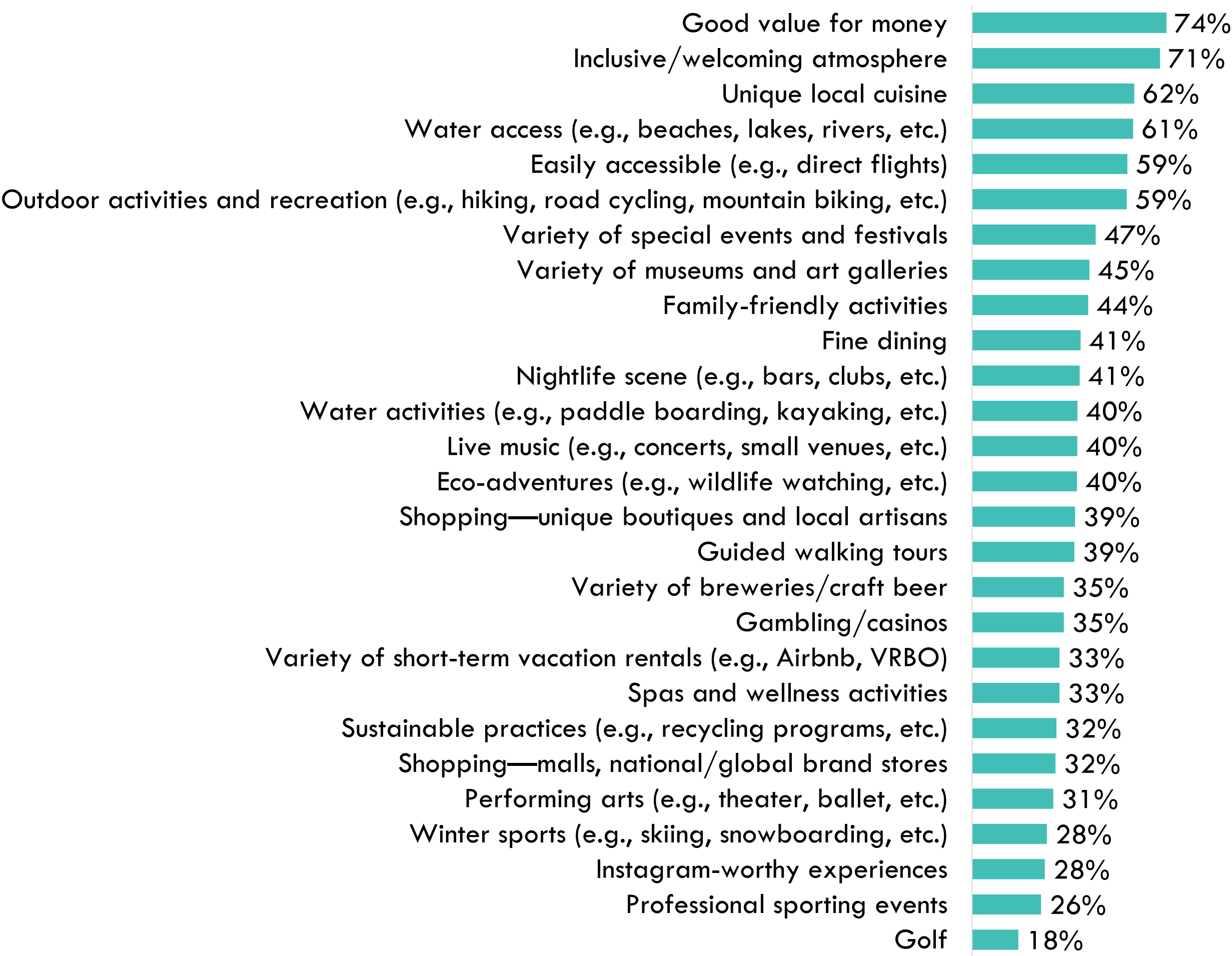
# DESTINATION PERCEPTIONS

A woman with blonde hair, wearing a tan baseball cap, a dark t-shirt, and grey waders, is standing in a river. She is holding a fishing rod with both hands, and a fishing line is visible extending from the rod. She is smiling and looking towards the camera. The background is a blurred riverbank with green foliage and a wooden structure. The text "DESTINATION PERCEPTIONS" is overlaid in white, bold, sans-serif font across the middle of the image.

More than seven in ten past 12-month visitors to Reno Tahoe say good value for money (74%) and an inclusive/welcoming atmosphere are very/extremely important when selecting a vacation destination. This is followed by unique local cuisine (62%), water access (61%), easily accessible (59%), and outdoor activities (59%).

Within the past 12-month visitor audience segments, Digital Junkies (90%) and Intellectual Activists (83%) both rate inclusive/welcoming atmosphere as the most important attribute when selecting a vacation destination. For Mindful Moms (84%) and Family Travelers (88%), good value is of top importance. For Adrenaline Junkies, outdoor activities/recreation is the most important destination attribute (85%).

Figure 29: Destination Attribute Importance—Top 2 Box (Recent Visitors)



Question: How important are the following to you when selecting a vacation destination? Base: Past 12-month Reno visitors, 402 respondents.



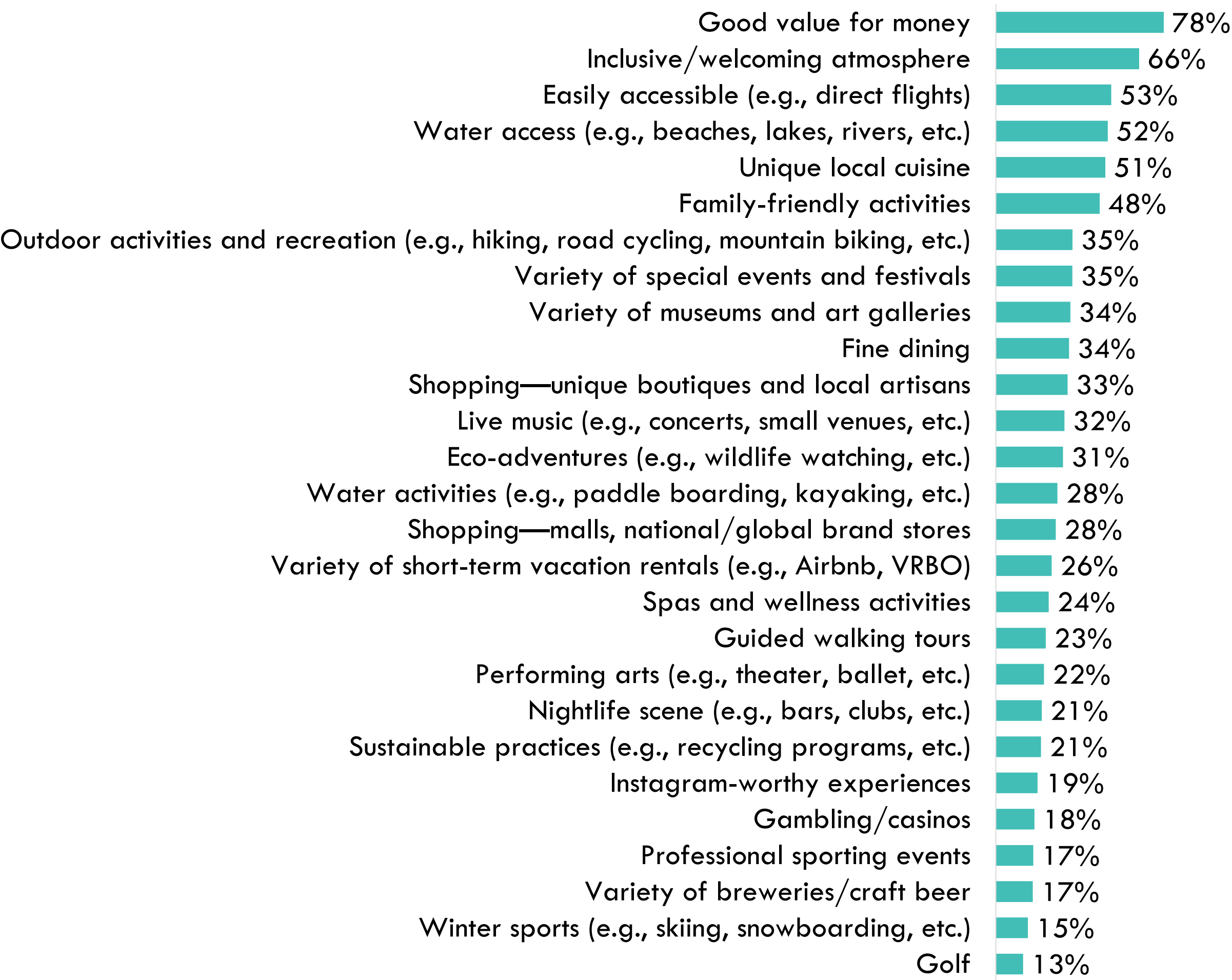
# Destination Attribute Importance by Segment

Top 2 Box	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Good value for money	84%	86%	81%	84%	83%	88%	78%	59%	89%	59%	75%	77%	72%
Inclusive/welcoming atmosphere	88%	90%	83%	81%	84%	79%	72%	68%	82%	65%	71%	68%	73%
Unique local cuisine	84%	89%	69%	79%	81%	79%	65%	51%	83%	67%	46%	56%	64%
Water access (e.g., beaches, lakes, rivers, etc.)	78%	84%	76%	76%	77%	73%	65%	50%	76%	43%	65%	60%	62%
Easily accessible (e.g., direct flights)	74%	80%	67%	69%	73%	66%	63%	54%	62%	52%	61%	54%	61%
Outdoor activities and recreation (e.g., hiking, road cycling, mountain biking)	82%	84%	65%	74%	85%	82%	65%	52%	75%	68%	43%	50%	63%
Variety of special events and festivals	70%	82%	66%	71%	70%	70%	54%	34%	57%	43%	42%	35%	53%
Variety of museums and art galleries	66%	66%	64%	55%	71%	60%	49%	37%	51%	49%	34%	35%	50%
Family-friendly activities	68%	78%	45%	89%	63%	84%	48%	32%	60%	43%	33%	47%	42%
Fine dining	60%	71%	52%	54%	63%	59%	48%	32%	62%	38%	29%	35%	45%
Nightlife scene (e.g., bars, clubs, etc.)	60%	73%	44%	55%	59%	57%	44%	32%	55%	35%	33%	25%	49%
Water activities (e.g., paddle boarding, kayaking, etc.)	61%	59%	40%	56%	61%	57%	45%	29%	53%	45%	29%	33%	44%
Live music (e.g., concerts, small venues, etc.)	62%	79%	42%	60%	63%	58%	45%	25%	57%	43%	24%	26%	47%
Eco-adventures (e.g., wildlife watching, etc.)	70%	75%	53%	55%	61%	65%	45%	27%	64%	34%	30%	44%	38%
Shopping—unique boutiques and local artisans	59%	75%	47%	70%	64%	61%	42%	35%	59%	36%	27%	35%	41%
Guided walking tours	59%	70%	46%	58%	56%	58%	47%	26%	45%	41%	30%	32%	42%
Variety of breweries/craft beer	57%	71%	40%	48%	61%	57%	41%	30%	55%	32%	23%	25%	40%
Gambling/casinos	55%	61%	39%	56%	54%	54%	40%	23%	41%	30%	30%	32%	36%
Variety of short-term vacation rentals (e.g., Airbnb, VRBO)	54%	76%	47%	69%	56%	59%	37%	27%	49%	35%	19%	27%	36%
Spas and wellness activities	60%	72%	42%	67%	51%	62%	40%	17%	51%	30%	23%	22%	39%
Sustainable practices (e.g., recycling programs, etc.)	60%	59%	51%	51%	56%	53%	34%	33%	47%	31%	22%	24%	36%
Shopping—malls, national/global brand stores	50%	63%	36%	62%	49%	53%	36%	24%	51%	28%	20%	27%	34%
Performing arts (e.g., theater, ballet, etc.)	53%	57%	43%	51%	54%	54%	36%	20%	41%	36%	18%	24%	35%
Winter sports (e.g., skiing, snowboarding, etc.)	50%	56%	39%	53%	47%	50%	37%	10%	42%	30%	19%	18%	34%
Instagram-worthy experiences	47%	63%	35%	56%	46%	56%	33%	18%	50%	24%	14%	23%	30%
Professional sporting events	43%	64%	23%	49%	43%	44%	30%	22%	41%	26%	15%	20%	29%
Golf	36%	42%	17%	23%	28%	26%	18%	13%	27%	13%	13%	14%	20%

More than three quarters of potential Reno Tahoe visitors say good value for money (75%) is very/extremely important when selecting a vacation destination, followed by inclusive/welcoming atmosphere (66%). Around half of potential visitors also look for easily accessible destinations (53%), water access (52%), unique local cuisine (51%), and family-friendly activities (48%).

For those who are interested in visiting Reno Tahoe in the next year, good value for money (88%), inclusive/welcoming atmosphere (80%), and family-friendly activities (75%) are the top attributes looked for in a destination. Seven in ten are also more likely to look for destinations that are easily accessible (72%) and/or have water access (71%).

Figure 30: Destination Attribute Importance—Top 2 Box (Potential Visitors)



Question: How much do each of the following statements describe you? Base: Not past 12-month Reno visitors, 800 respondents.



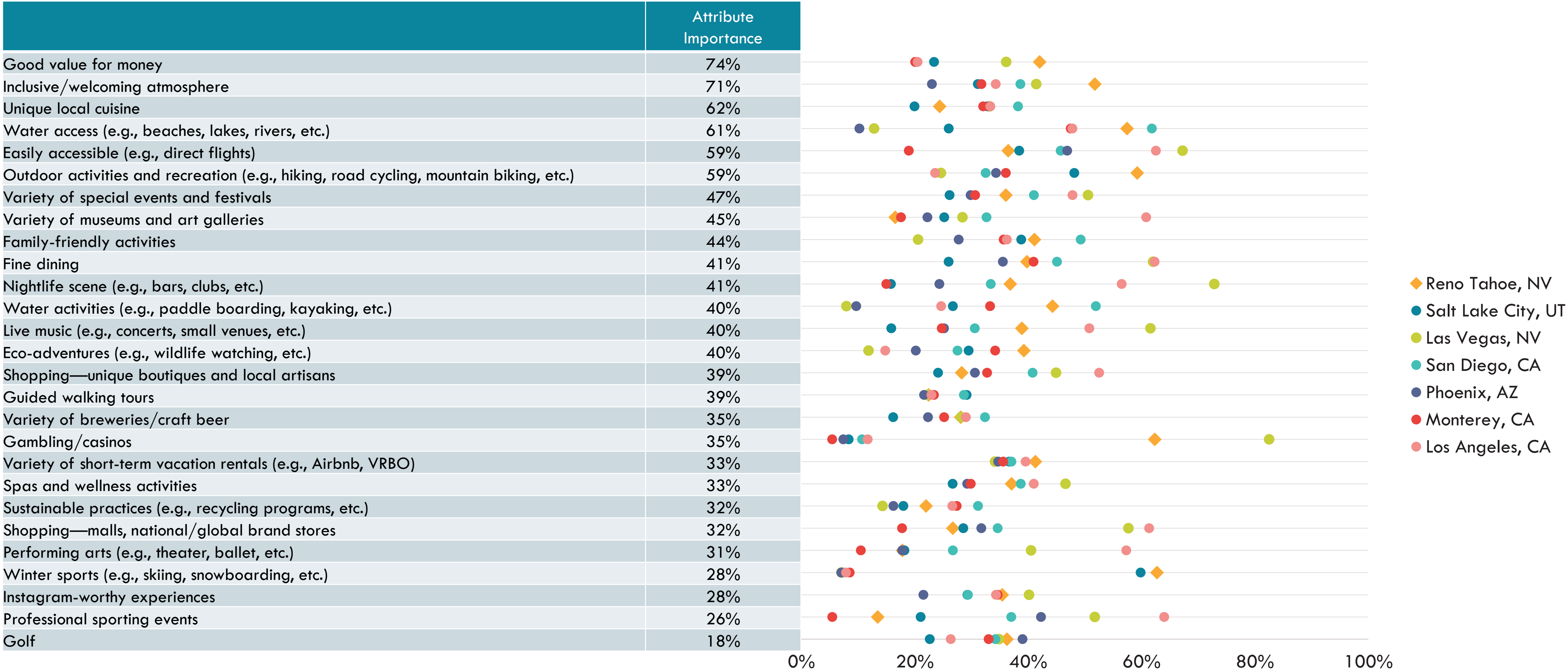
# Destination Attribute Importance by Segment

POTENTIAL VISITORS

	Audience Segments						Generational Segments				Reno Travel Segments		
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gem Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
Good value for money	85%	84%	77%	84%	84%	84%	89%	79%	79%	76%	71%	80%	88%
Inclusive/welcoming atmosphere	82%	82%	79%	77%	82%	83%	75%	72%	70%	61%	63%	67%	80%
Easily accessible (e.g., direct flights)	57%	57%	59%	55%	66%	59%	51%	60%	51%	51%	51%	54%	72%
Water access (e.g., beaches, lakes, rivers, etc.)	71%	70%	58%	65%	76%	70%	61%	64%	56%	43%	48%	53%	71%
Unique local cuisine	70%	55%	55%	58%	71%	58%	52%	56%	52%	47%	49%	51%	75%
Family-friendly activities	68%	59%	60%	77%	67%	82%	51%	56%	58%	39%	48%	48%	52%
Outdoor activities and recreation (e.g., hiking, road cycling, mountain biking)	66%	49%	46%	60%	79%	62%	44%	54%	43%	22%	35%	36%	63%
Variety of special events and festivals	57%	34%	46%	41%	63%	49%	43%	45%	39%	28%	43%	33%	55%
Variety of museums and art galleries	55%	39%	56%	41%	55%	38%	29%	39%	39%	30%	39%	33%	49%
Fine dining	58%	57%	55%	29%	50%	48%	23%	47%	35%	27%	39%	32%	48%
Shopping—unique boutiques and local artisans	48%	34%	44%	30%	55%	38%	72%	37%	28%	30%	34%	33%	50%
Live music (e.g., concerts, small venues, etc.)	56%	57%	50%	33%	54%	49%	17%	51%	35%	21%	32%	32%	44%
Eco-adventures (e.g., wildlife watching, etc.)	57%	48%	40%	50%	56%	42%	58%	40%	31%	24%	29%	32%	48%
Water activities (e.g., paddle boarding, kayaking, etc.)	49%	32%	33%	44%	58%	51%	33%	39%	45%	15%	24%	30%	40%
Shopping—malls, national/global brand stores	40%	25%	39%	28%	54%	41%	49%	38%	26%	21%	26%	28%	40%
Variety of short-term vacation rentals (e.g., Airbnb, VRBO)	47%	53%	38%	39%	48%	33%	57%	47%	24%	13%	17%	29%	28%
Spas and wellness activities	45%	38%	34%	39%	46%	44%	29%	47%	24%	13%	27%	24%	37%
Guided walking tours	35%	27%	42%	35%	36%	29%	25%	28%	26%	19%	25%	22%	27%
Performing arts (e.g., theater, ballet, etc.)	43%	23%	40%	27%	41%	32%	20%	37%	17%	17%	20%	23%	35%
Nightlife scene (e.g., bars, clubs, etc.)	43%	39%	37%	18%	46%	31%	30%	41%	21%	11%	20%	22%	33%
Sustainable practices (e.g., recycling programs, etc.)	47%	21%	43%	28%	45%	37%	13%	29%	24%	16%	18%	22%	31%
Instagram-worthy experiences	36%	28%	28%	27%	39%	37%	36%	37%	21%	8%	19%	19%	38%
Gambling/casinos	26%	18%	21%	16%	28%	23%	29%	30%	13%	13%	22%	17%	25%
Professional sporting events	33%	27%	30%	15%	40%	30%	17%	31%	20%	9%	19%	17%	31%
Variety of breweries/craft beer	40%	30%	30%	15%	44%	23%	18%	33%	14%	10%	23%	15%	27%
Winter sports (e.g., skiing, snowboarding, etc.)	34%	23%	26%	15%	35%	29%	37%	31%	17%	3%	14%	15%	23%
Golf	28%	17%	20%	7%	25%	16%	7%	21%	12%	9%	16%	12%	19%

Among past 12-month Reno Tahoe visitors, good value, inclusive/welcoming atmosphere, unique local cuisine, water access, and easily accessible rank among the top attributes looked for in a leisure destination. Reno Tahoe places first for good value and inclusive/welcoming atmosphere, ahead of any competitor. Reno Tahoe ranks second for water access, behind San Diego. Reno Tahoe places second to last for unique local cuisine (ahead of Salt Lake) and for easy access (ahead of Monterey).

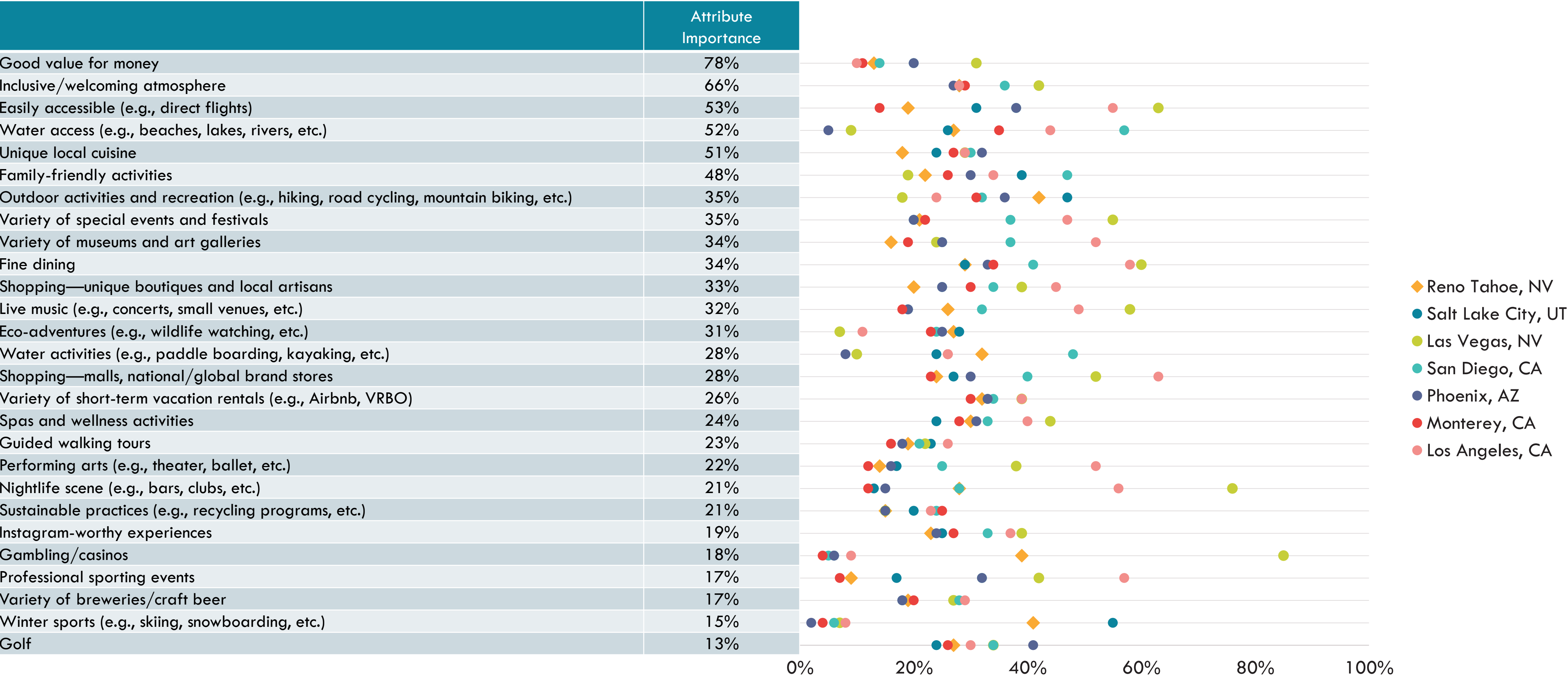
Figure 31: Competitor Attribute Rating (Recent Visitors)





Among potential Reno Tahoe visitors, good value, inclusive/welcoming atmosphere, easy access, water access and unique local cuisine rank among the top attributes looked for in a destination. Reno Tahoe lags behind key competitors for each attributes tested ranking second for outdoor activities (behind Salt Lake City), winter sports (behind Salt Lake City), gambling (behind Las Vegas), and water activities (behind San Diego). For this group, Reno Tahoe ranks near last for inclusive/welcoming atmosphere and golf.

Figure 32: Competitor Attribute Rating (Potential Visitors)



# Reno Tahoe Top Mind Associations

When thinking about Reno Tahoe as a destination, the first words that come to mind for past 12-month visitors include Lake Tahoe, gambling, and casinos. Many recent visitors travelers also associate Reno Tahoe with skiing, beauty, mountains, lakes, and activities.

Figure 33a: Reno Tahoe Top of Mind Associations (Recent Visitors)



Question: Thinking about Reno Tahoe as a travel destination, what first comes to mind? Base: Past 12-month Reno visitors, 402 respondents.



### Figure 33b: Reno Tahoe Top of Mind Associations (Potential Visitors)



Destination  Analysts

# Reno Tahoe's Top Destination Attributes

Past 12-month Reno Tahoe visitors most often associate the destination with winter sports, gambling/casinos, outdoor activities, water access, and an inclusive/welcoming atmosphere. Within its competitive set, Reno owns five of its top ten attributes. Las Vegas pulls ahead for gambling/casinos and fine dining, while San Diego ranks first for water access/activities and being family-friendly.

Figure 34: Reno's Top Destination Attributes vs Competitors (Recent Visitors)

	Reno Tahoe, NV	Salt Lake City, UT	Las Vegas, NV	San Diego, CA	Phoenix, AZ	Monterey, CA	Los Angeles, CA
1 Winter sports (e.g., skiing, snowboarding, etc.)	63%	60%	7%	7%	7%	9%	8%
2 Gambling/casinos	62%	8%	83%	11%	7%	5%	12%
3 Outdoor activities and recreation (e.g., hiking, road cycling, mountain biking, etc.)	59%	48%	25%	33%	34%	36%	24%
4 Water access (e.g., beaches, lakes, rivers, etc.)	57%	26%	13%	62%	10%	48%	48%
5 Inclusive/welcoming atmosphere	52%	31%	41%	39%	23%	32%	34%
6 Water activities (e.g., paddle boarding, kayaking, etc.)	44%	27%	8%	52%	10%	33%	25%
7 Good value for money	42%	23%	36%	20%	20%	20%	21%
8 Variety of short-term vacation rentals (e.g., Airbnb, VRBO)	41%	37%	34%	37%	35%	36%	40%
9 Family-friendly activities	41%	39%	21%	49%	28%	36%	36%
10 Fine dining	40%	26%	62%	45%	36%	41%	62%

Question: For each attribute below, please select the destination(s) that most closely reflect that attribute, whether you have been before or not.? Base: Past 12-month Reno visitors, 402 respondents.



# Reno Tahoe's Top Destination Attributes

**Potential Reno Tahoe visitors most often associate the destination with outdoor activities, winter sports, and gambling/casinos.** Within its competitive set, Reno Tahoe does not own any of its top ten attributes. Salt Lake City is more often associated with outdoor activities and winter sports, San Diego owns water activities, and Phoenix ranks highest for golf. Los Angeles and Las Vegas tie for short-term rentals. Las Vegas owns gambling, spas, fine dining, nightlife, and inclusive/welcoming atmosphere.

Figure 35: Reno’s Top Destination Attributes vs Competitors (Potential Visitors)

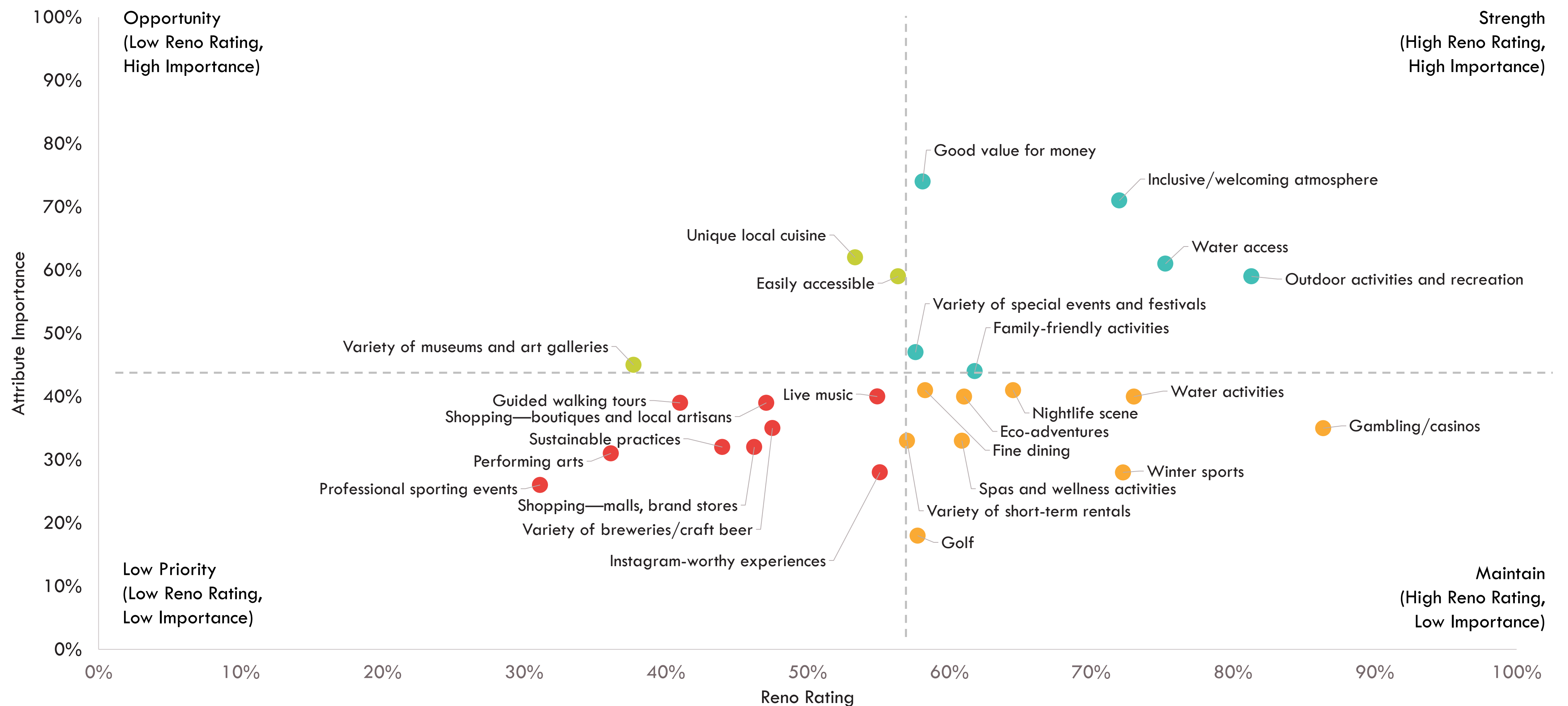
	Reno Tahoe, NV	Salt Lake City, UT	Las Vegas, NV	San Diego, CA	Phoenix, AZ	Monterey, CA	Los Angeles, CA
1 Outdoor activities and recreation (e.g., hiking, road cycling, mountain biking, etc.)	42%	47%	18%	32%	36%	31%	24%
2 Winter sports (e.g., skiing, snowboarding, etc.)	41%	55%	7%	6%	2%	4%	8%
3 Gambling/casinos	39%	6%	85%	5%	6%	4%	9%
4 Water activities (e.g., paddle boarding, kayaking, etc.)	32%	24%	10%	48%	8%	26%	26%
5 Variety of short-term vacation rentals (e.g., Airbnb, VRBO)	32%	33%	39%	34%	33%	30%	39%
6 Spas and wellness activities	30%	24%	44%	33%	31%	28%	40%
7 Fine dining	29%	29%	60%	41%	33%	34%	58%
8 Nightlife scene (e.g., bars, clubs, etc.)	28%	13%	76%	28%	15%	12%	56%
9 Inclusive/welcoming atmosphere	28%	28%	42%	36%	27%	29%	28%
10 Golf	27%	24%	34%	34%	41%	26%	30%

Question: For each attribute below, please select the destination(s) that most closely reflect that attribute, whether you have been before or not.? Base: Past 12-month Not past 12-month Reno visitors, 800 respondents.

# Destination Attribute Importance vs Rating

When measuring Reno Tahoe’s destination attribute perceptions against importance rating, six key attributes fall into the strength category among past 12-month visitors, including good value, inclusive/welcoming, water access, outdoor activities, variety of special events/festivals, and family-friendly activities. Just three attributes are considered opportunities – unique local cuisine, variety of museums and galleries, and easily accessible.

Figure 36: Destination Attribute Importance vs Reno Rating (Recent Visitors)

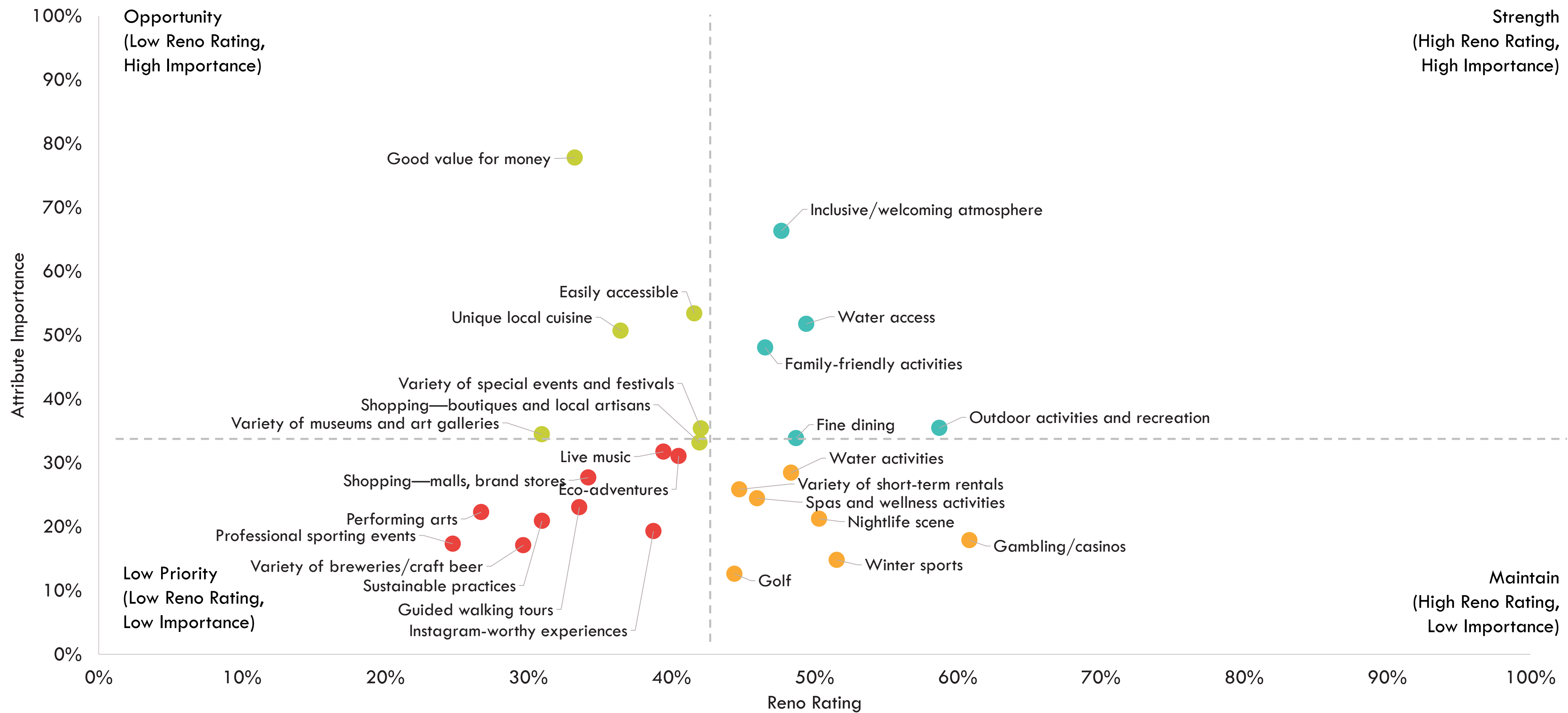




# Destination Attribute Importance vs Rating

Among potential Reno Tahoe visitors, five key attributes fall into the strength category, including inclusive/welcoming, water access, outdoor activities, family-friendly activities, and fine dining. Six attributes are considered opportunities – good value, unique local cuisine, easily accessible, variety of museums/galleries, variety of special events/festivals, and boutique/local artisan shopping.

Figure 37: Destination Attribute Importance vs Reno Rating (Potential Visitors)



# Reno Tahoe Destination Attribute Need Gap

When assessing the delta between a destination attribute’s importance rating and Reno Tahoe’s performance, there are only a few opportunities to bridge the gap among past 12-month visitors. These include easily accessible (-3 points), variety of museums/galleries (-7 points), unique local cuisine (-8 points), and good value (-16 points). Reno Tahoe over indexes on every other destination attribute, where the destination’s rating outperforms the attribute’s importance when selecting a vacation destination.

Figure 38: Reno Tahoe Recent Visitor Perceptions vs Importance (Recent Visitors)

	Reno Tahoe Rating	Importance Rating	Category	Need Gap
Easily accessible (e.g., direct flights)	56%	59%	Opportunity	-3%
Variety of museums and art galleries	38%	45%	Opportunity	-7%
Unique local cuisine	53%	62%	Opportunity	-8%
Outdoor activities and recreation (e.g., hiking, road cycling, mountain biking, etc.)	81%	59%	Strength	23%
Family-friendly activities	62%	44%	Strength	18%
Water access (e.g., beaches, lakes, rivers, etc.)	75%	61%	Strength	14%
Variety of special events and festivals	58%	47%	Strength	11%
Inclusive/welcoming atmosphere	72%	71%	Strength	1%
Good value for money	58%	74%	Strength	-16%
Gambling/casinos	86%	35%	Maintain	52%
Winter sports (e.g., skiing, snowboarding, etc.)	72%	28%	Maintain	44%
Golf	58%	18%	Maintain	40%
Water activities (e.g., paddle boarding, kayaking, etc.)	73%	40%	Maintain	33%
Spas and wellness activities	61%	33%	Maintain	28%
Variety of short-term vacation rentals (e.g., Airbnb, VRBO)	57%	33%	Maintain	24%
Nightlife scene (e.g., bars, clubs, etc.)	64%	41%	Maintain	24%
Eco-adventures (e.g., wildlife watching, etc.)	61%	40%	Maintain	21%
Fine dining	58%	41%	Maintain	17%
Instagram-worthy experiences	55%	28%	Low Priority	28%
Live music (e.g., concerts, small venues, etc.)	55%	40%	Low Priority	15%
Shopping—malls, national/global brand stores	46%	32%	Low Priority	15%
Variety of breweries/craft beer	48%	35%	Low Priority	13%
Sustainable practices (e.g., recycling programs, etc.)	44%	32%	Low Priority	12%
Shopping—unique boutiques and local artisans	47%	39%	Low Priority	8%
Performing arts (e.g., theater, ballet, etc.)	36%	31%	Low Priority	5%
Professional sporting events	31%	26%	Low Priority	5%
Guided walking tours	41%	39%	Low Priority	2%

# Reno Tahoe Destination Attribute Need Gap

There are more opportunities to bridge the importance-rating gap among potential travelers. These include good value (-45 points), inclusive/welcoming atmosphere (-18 points), unique local cuisine (-15 points), easily accessible (-11 points), and variety of museums and galleries (-3 points).

Figure 39: Reno Tahoe Potential Visitor Perceptions vs Importance (Potential Visitors)

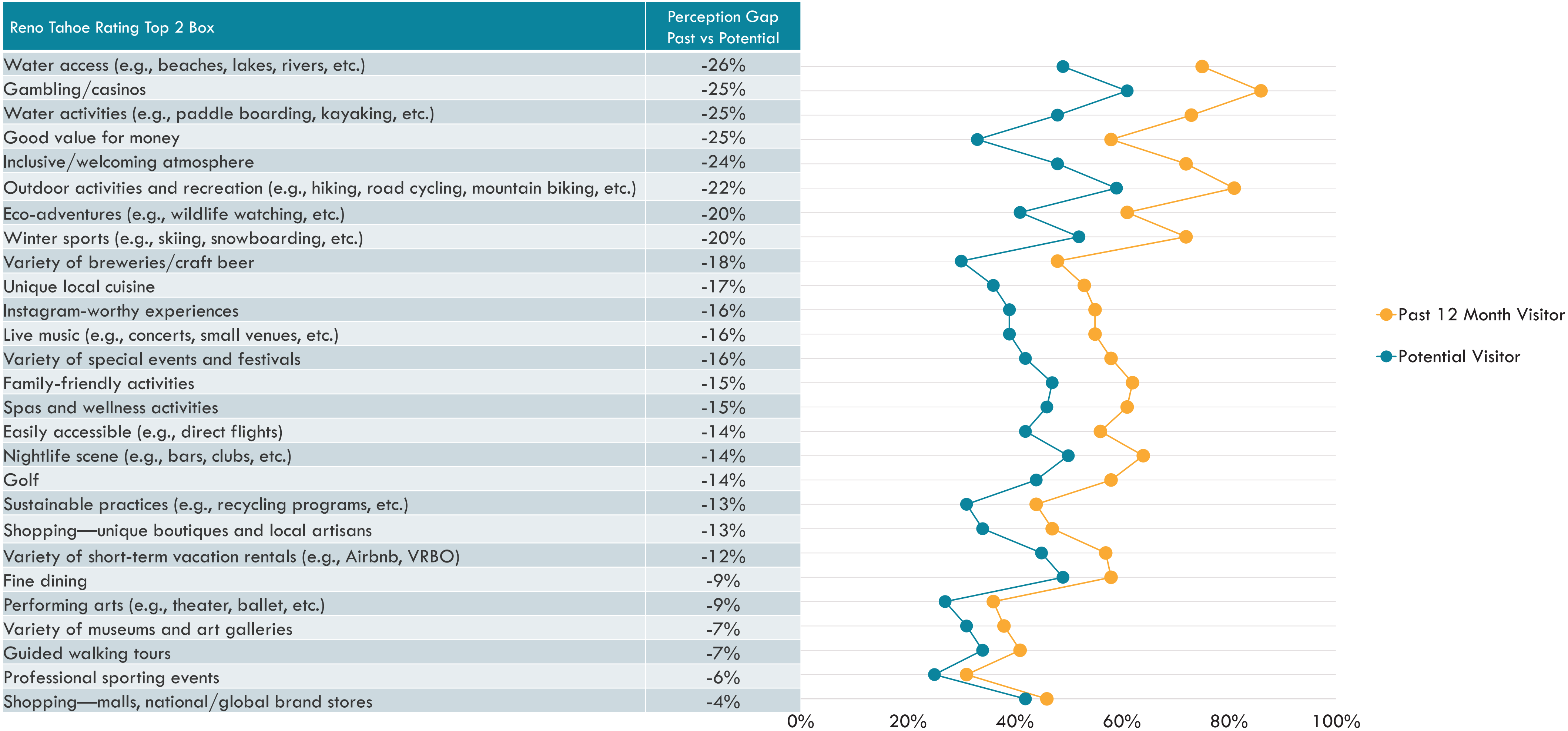
	Reno Tahoe Rating	Importance Rating	Category	Need Gap
Shopping—boutiques and local artisans	42%	33%	Opportunity	9%
Variety of special events and festivals	42%	35%	Opportunity	7%
Variety of museums and art galleries	31%	34%	Opportunity	-3%
Easily accessible	42%	53%	Opportunity	-11%
Unique local cuisine	36%	51%	Opportunity	-15%
Good value for money	33%	78%	Opportunity	-45%
Outdoor activities and recreation	59%	35%	Strength	24%
Fine dining	49%	34%	Strength	15%
Family-friendly activities	47%	48%	Strength	-1%
Water access	49%	52%	Strength	-3%
Inclusive/welcoming atmosphere	48%	66%	Strength	-18%
Gambling/casinos	61%	18%	Maintain	43%
Winter sports	52%	15%	Maintain	37%
Golf	44%	13%	Maintain	31%
Nightlife scene	50%	21%	Maintain	29%
Spas and wellness activities	46%	24%	Maintain	22%
Water activities	48%	28%	Maintain	20%
Variety of short-term rentals	45%	26%	Maintain	19%
Instagram-worthy experiences	39%	19%	Low Priority	20%
Variety of breweries/craft beer	30%	17%	Low Priority	13%
Guided walking tours	34%	23%	Low Priority	11%
Sustainable practices	31%	21%	Low Priority	10%
Eco-adventures	41%	31%	Low Priority	10%
Professional sporting events	25%	17%	Low Priority	8%
Live music	39%	32%	Low Priority	7%
Shopping—malls, brand stores	34%	28%	Low Priority	6%
Performing arts	27%	22%	Low Priority	5%



# Reno Tahoe Perception Gap

**There is a clear destination perception gap between past and potential Reno Tahoe visitors.** Past 12-month visitors are much more likely to rate Reno Tahoe higher on many destination attributes compared to potential visitors. The largest gaps emerge for water access (26 points), gambling/casinos (25 points), water activities (25 points), good value (25 points) and welcoming atmosphere (24 points).

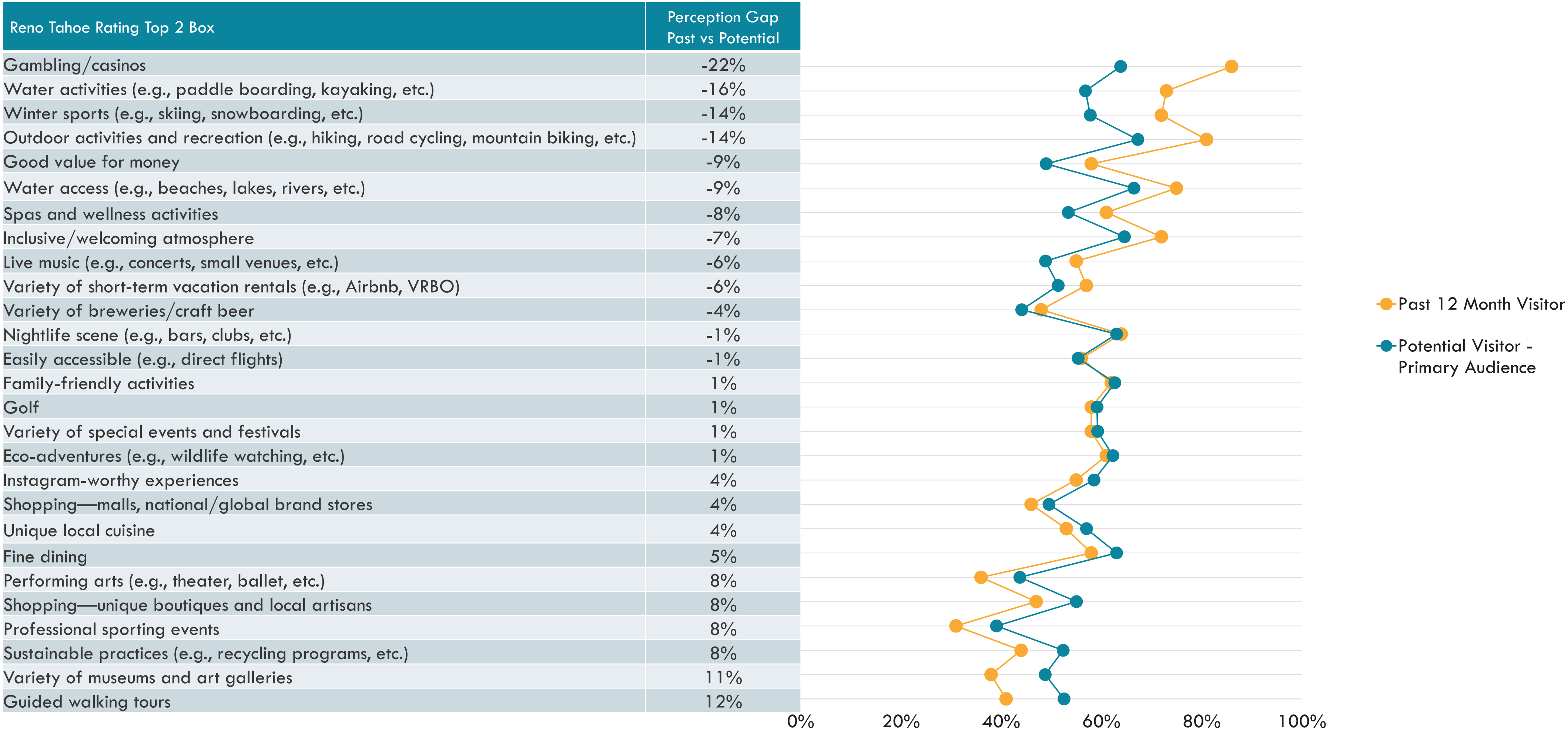
Figure 40: Reno Tahoe Perceptions (Recent vs Potential Visitors)



# Reno Tahoe Perception Gap

**Reno Tahoe’s destination perception gap shrinks when comparing past 12-month visitors and potential visitors in the Primary Audience.** In fact, Primary Audience potential travelers rate Reno Tahoe higher on some attributes compared to past 12-month visitors. The largest gaps exist for gambling (22 points), water activities (16 points), winter sports (14 points), and outdoor activities (14 points).

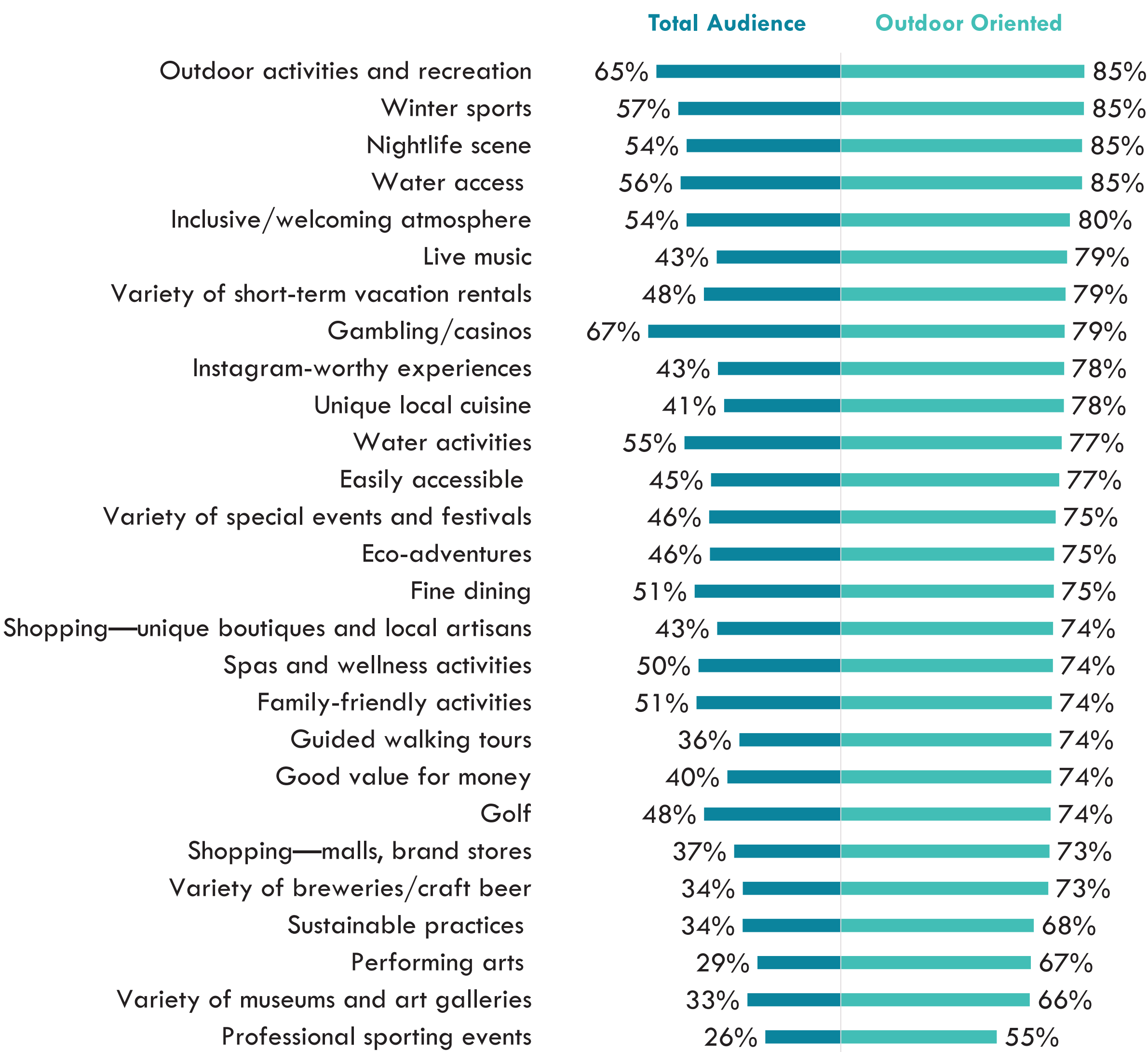
**Figure 41: Reno Tahoe Perceptions (Recent vs Primary Audience Potential Visitors)**



# Unique Value Proposition – Outdoor Centric

Among travelers that prioritize outdoor activities (including water and winter sports) when selecting a vacation destination, perceptions of Reno Tahoe are notably stronger compared to the general travel audience. In fact, the top-rated attributes for Reno Tahoe among the Outdoor oriented audience includes outdoor activities (85%), winter sports (85%), and water access (85%). Perceptions of Reno Tahoe on each key attribute is notably higher compared to the general traveler population.

Figure 42: Reno Tahoe Destination Attribute Rating

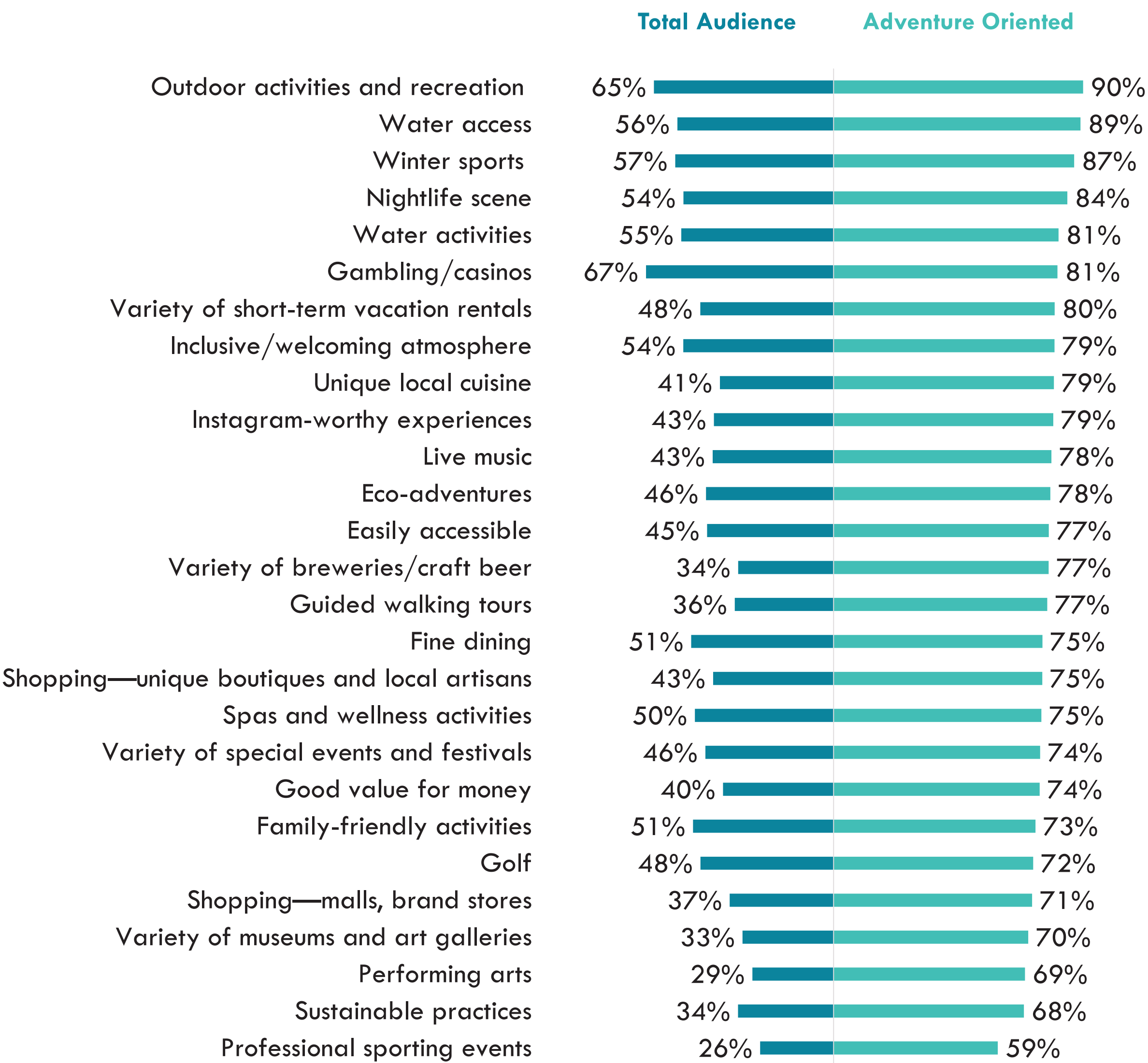




# Unique Value Proposition – Adventure Hub

Among travelers that prioritize adventure hubs when selecting a vacation destination, perceptions of Reno Tahoe are notably stronger compared to the general travel audience. In fact, the top-rated attributes for Reno Tahoe among the Adventure oriented audience include outdoor activities (90%), water access (89%), and winter sports (87%). Perceptions of Reno Tahoe on each key attribute is notably higher compared to the general traveler population.

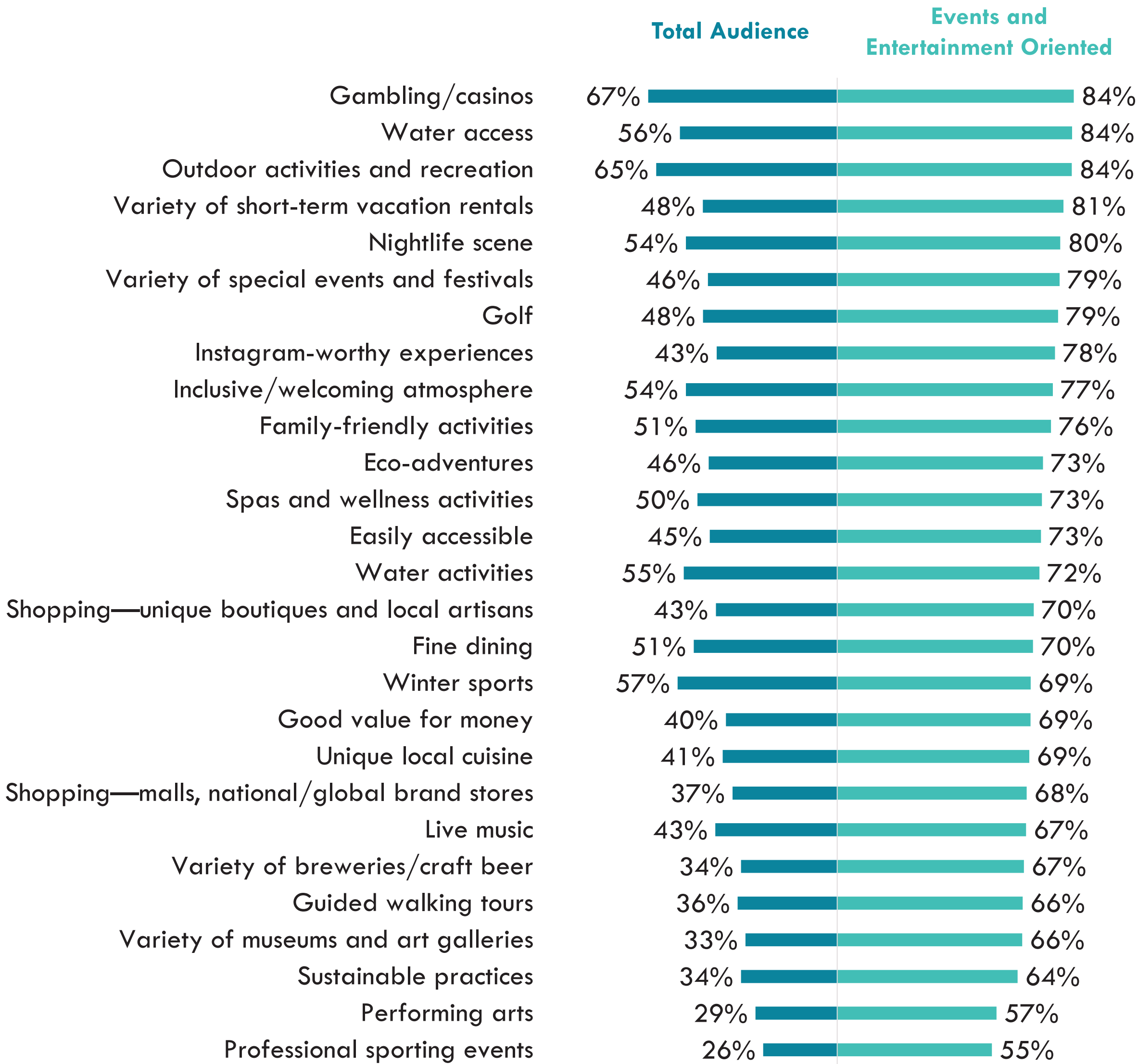
Figure 43: Reno Tahoe Destination Attribute Rating



# Unique Value Proposition – Events and Entertainment

Among travelers that prioritize events and entertainment when selecting a vacation destination, perceptions of Reno Tahoe are generally stronger compared to the general travel audience. The top-rated attributes for Reno Tahoe among the Events and Entertainment oriented audience include gambling/casinos (84%), water access (84%), outdoor activities (84%), variety of short-term rentals (81%), nightlife (80%), variety of events/festivals (79%), and golf (79%). Perceptions of Reno Tahoe on each key attribute is higher compared to the general traveler population.

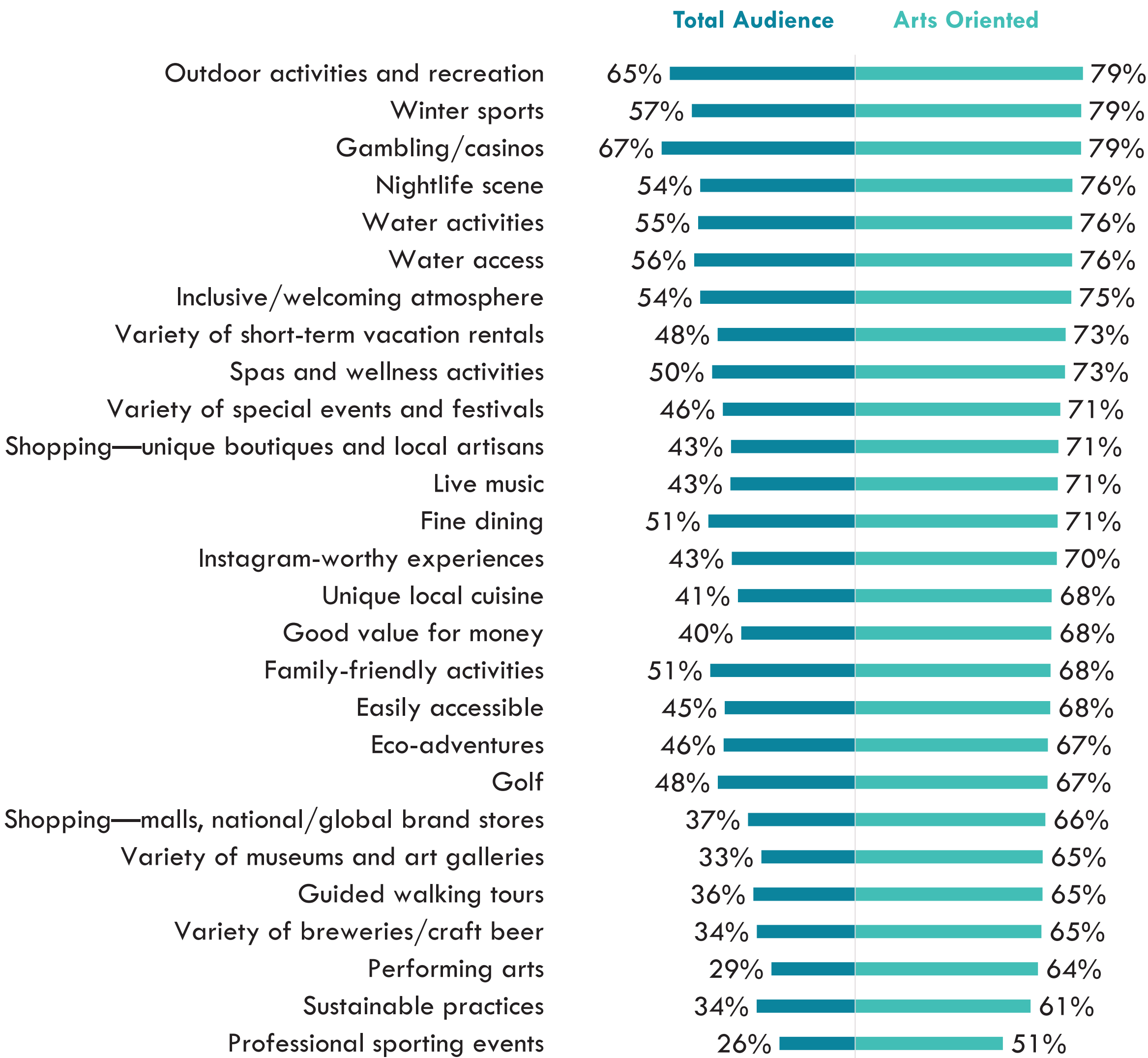
Figure 44: Reno Tahoe Destination Attribute Rating



# Unique Value Proposition – Arts Scene

Among travelers that prioritize the arts when selecting a vacation destination, perceptions of Reno Tahoe are somewhat stronger compared to the general travel audience. The top-rated attributes for Reno Tahoe among the Arts oriented audience include outdoor activities (79%), winter sports (79%), and gambling (79%). Two thirds rate Reno Tahoe as having a variety of museums and galleries (65%), +32 points higher than the general travel audience. Similarly, 64 percent perceive Reno Tahoe as having a strong performing arts scene, +35 points higher than the average traveler.

Figure 45: Reno Tahoe Destination Attribute Rating

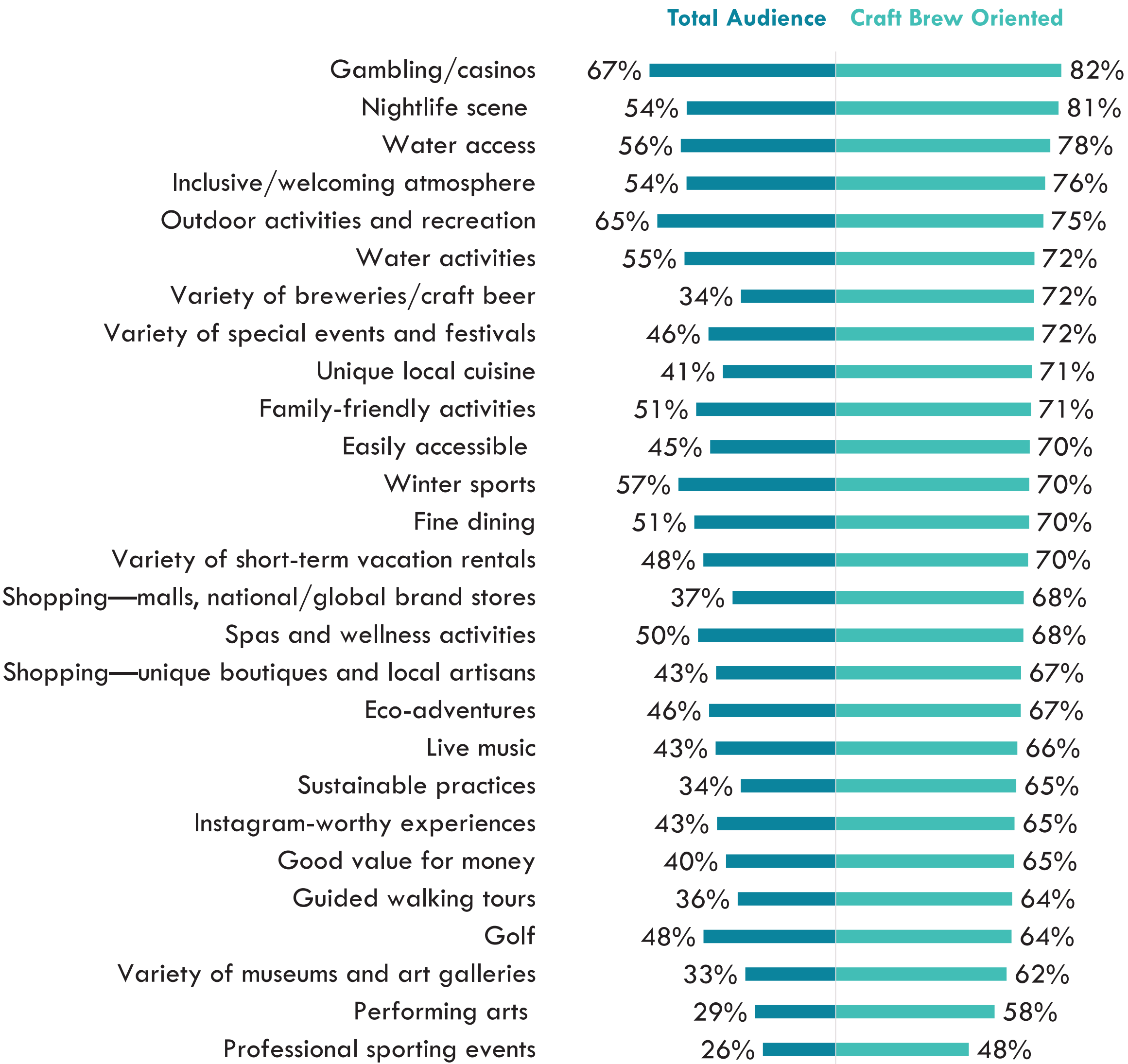




# Unique Value Proposition – Craft Breweries

Among travelers that prioritize craft breweries when selecting a vacation destination, perceptions of Reno Tahoe are somewhat stronger compared to the general travel audience. The top-rated attributes for Reno Tahoe among the Craft Brew oriented audience include gambling/casinos (82%), nightlife (81%), water access (78%), and an inclusive/welcoming atmosphere (76%). More than double the Craft Brew oriented audience rates Reno Tahoe highly for variety of breweries/craft beer compared to the general traveler (72% vs 34%).

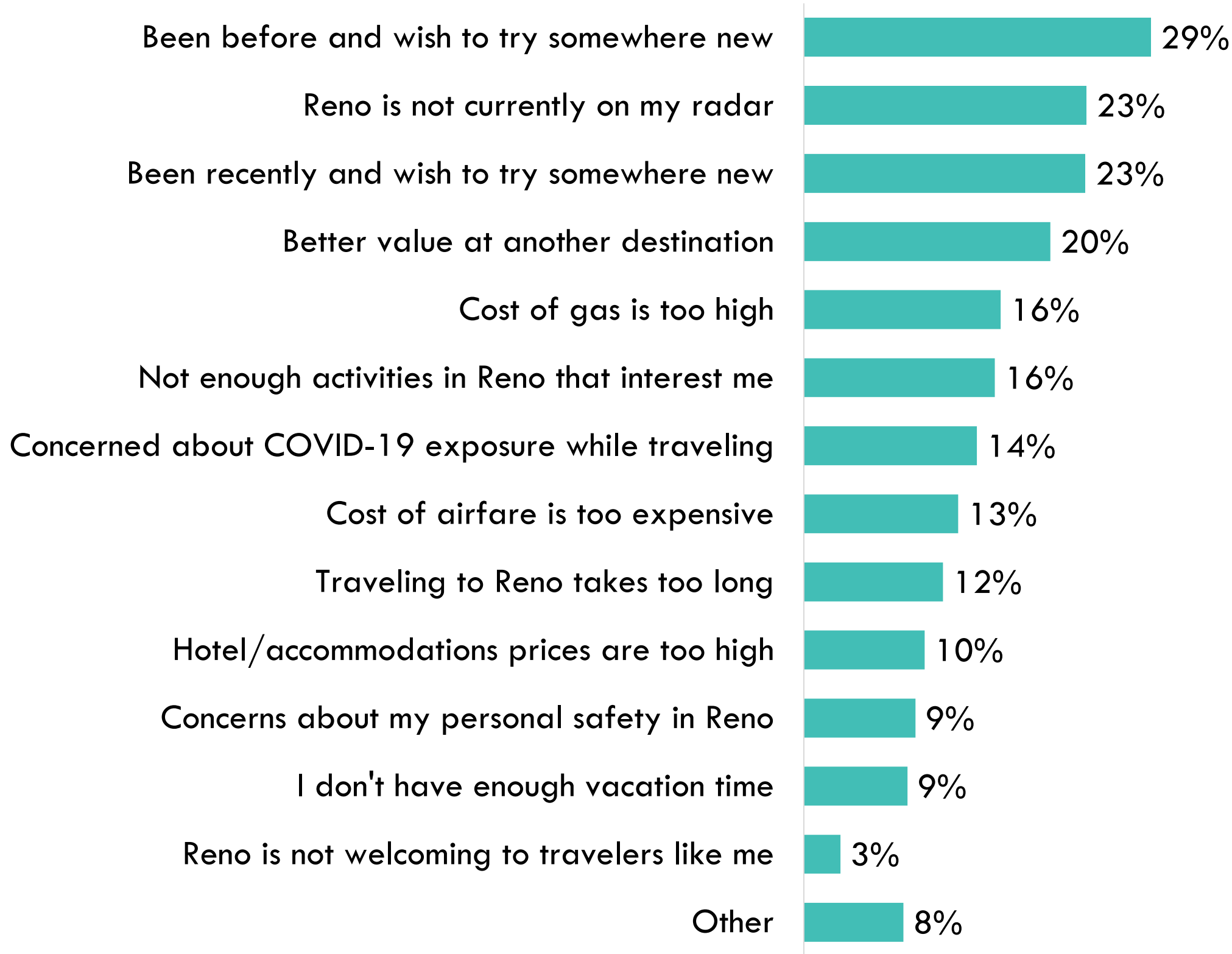
Figure 46: Reno Tahoe Destination Attribute Rating



# Reno Tahoe Next 12 Month Travel Barriers

For recent visitors to Reno Tahoe who are not considering a return to the destination in the next 12 months, the top travel barriers include having been before and wishing to try somewhere new (29%), Reno not being on their radar (23%), having been recently and wishing to try somewhere new (23%), and better value at other destinations (20%). Just under one fifth say the cost of gas is too high and/or that there are not enough activities of interest (16% each).

Figure 47: Reno Tahoe Next 12 Month Travel Barriers (Recent Visitors)



Question: Earlier you said you were not interested in visiting Reno in the next 12 months. What are the reasons for not considering a trip to Reno at this time? Base: Past 12-month Reno visitors, 402 respondents.

# Reno Tahoe Next 12 Month Travel Barriers by Segment

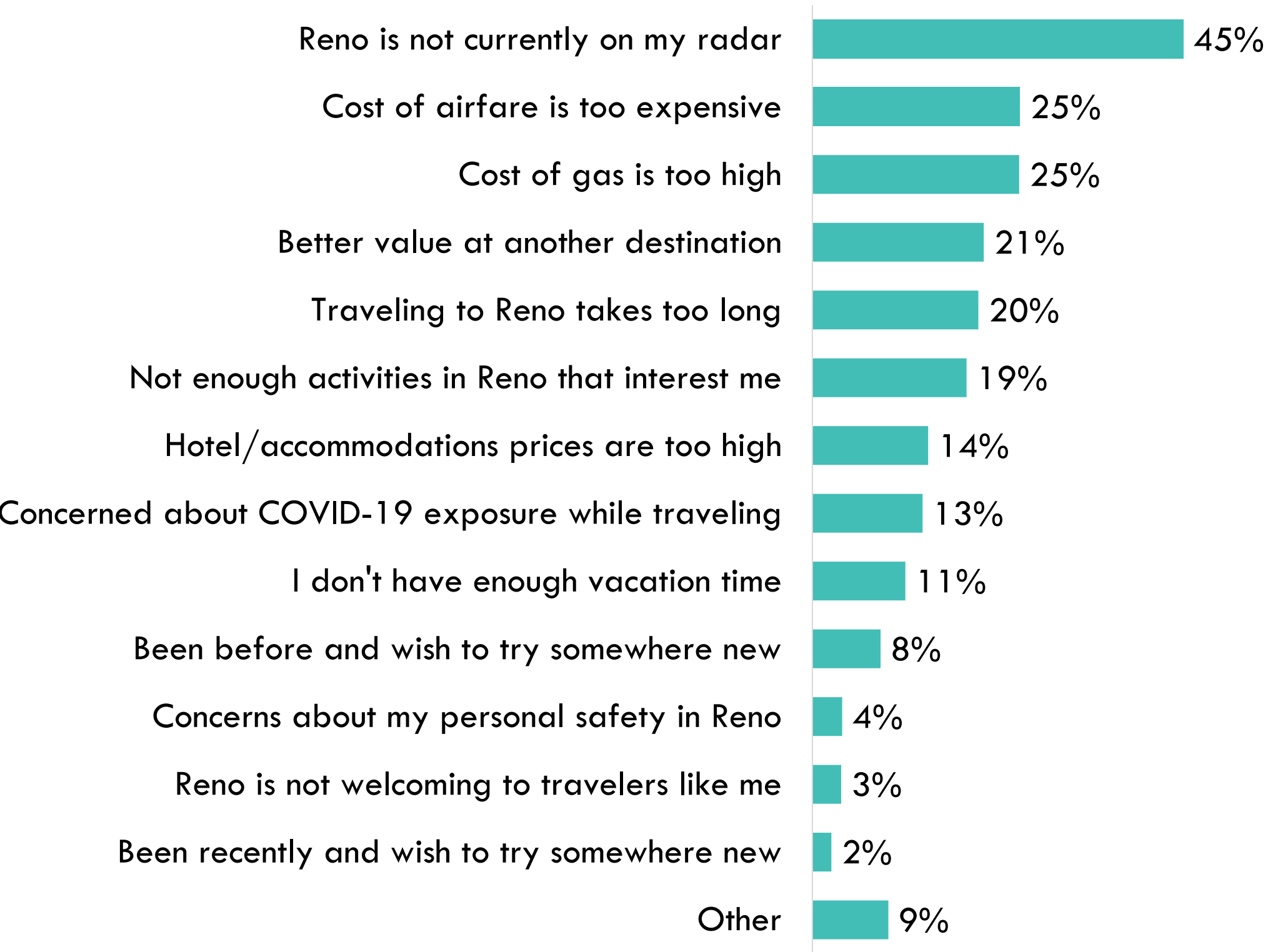
	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Been before and wish to try somewhere new	27%	26%	38%	36%	41%	44%	40%	28%	27%	41%	23%	32%	27%
Reno is not currently on my radar	19%	25%	31%	18%	31%	18%	32%	9%	12%	19%	32%	27%	22%
Been recently and wish to try somewhere new	19%	18%	27%	18%	14%	15%	25%	17%	17%	13%	30%	31%	19%
Better value at another destination	16%	8%	15%	3%	5%	5%	7%	16%	10%	30%	26%	17%	22%
Cost of gas is too high	18%	26%	8%	20%	16%	18%	19%	18%	22%	17%	13%	33%	7%
Not enough activities in Reno that interest me	14%	21%	16%	3%	17%	2%	9%	3%	2%	3%	32%	8%	20%
Concerned about COVID-19 exposure while traveling	26%	11%	31%	20%	17%	30%	18%	8%	26%	7%	10%	22%	10%
Cost of airfare is too expensive	16%	8%	17%	15%	9%	24%	13%	16%	19%	15%	9%	14%	12%
Traveling to Reno takes too long	12%	0%	7%	12%	12%	8%	12%	24%	18%	8%	12%	8%	13%
Hotel/accommodations prices are too high	14%	2%	22%	15%	11%	8%	13%	4%	10%	2%	16%	13%	8%
Concerns about my personal safety in Reno	11%	9%	16%	4%	5%	15%	9%	19%	10%	12%	1%	7%	10%
I don't have enough vacation time	7%	23%	2%	17%	13%	17%	12%	8%	9%	9%	4%	15%	5%
Reno is not welcoming to travelers like me	0%	1%	1%	0%	1%	0%	0%	14%	1%	9%	1%	3%	3%
Other	4%	12%	6%	15%	8%	8%	9%	3%	6%	6%	13%	7%	9%



# Reno Tahoe Next 12 Month Travel Barriers

For potential travelers who are not considering a visit to Reno Tahoe in the next 12 months, the top travel barriers include Reno not being on their radar (45%), the cost of airfare (25%), and the cost of gas (25%). Around one in five say there is better value at other destinations (21%), that it takes too long to get to Reno (20%), and that Reno does not have enough activities of interest (19%).

Figure 48: Reno Tahoe Next 12 Month Travel Barriers (Potential Visitors)



Question: Earlier you said you were not interested in visiting Reno in the next 12 months. What are the reasons for not considering a trip to Reno at this time? Base: Not past 12-month Reno visitors, 800 respondents.

# Reno Tahoe Next 12 Month Travel Barriers by Segment

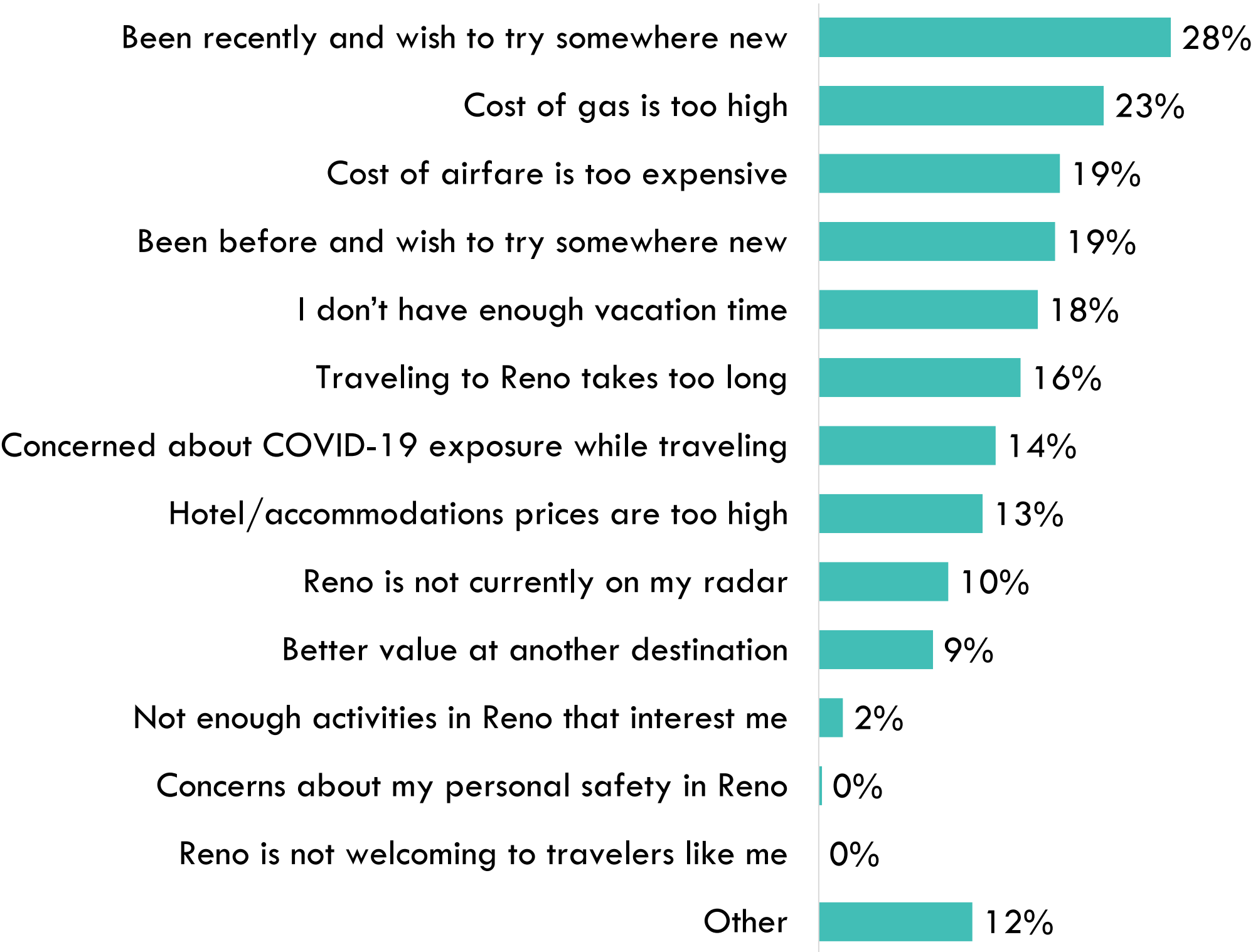
POTENTIAL VISITORS

	Audience Segments						Generational Segments				Reno Travel Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gem Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited
Reno is not currently on my radar	33%	35%	34%	34%	36%	36%	37%	35%	47%	49%	32%	48%
Cost of gas is too high	22%	20%	17%	32%	21%	26%	22%	18%	23%	29%	28%	24%
Cost of airfare is too expensive	26%	20%	24%	26%	22%	30%	31%	25%	21%	26%	24%	25%
Better value at another destination	14%	10%	20%	16%	19%	18%	13%	5%	24%	27%	18%	21%
Traveling to Reno takes too long	20%	14%	19%	12%	14%	14%	25%	15%	19%	23%	19%	20%
Not enough activities in Reno that interest me	25%	18%	26%	9%	22%	14%	22%	20%	20%	17%	24%	17%
Hotel/accommodations prices are too high	17%	6%	17%	5%	9%	3%	24%	10%	14%	15%	14%	14%
Concerned about COVID-19 exposure while traveling	12%	2%	16%	9%	8%	6%	13%	7%	15%	16%	12%	14%
Been before and wish to try somewhere new	7%	14%	9%	6%	15%	5%	13%	3%	5%	12%	34%	1%
I don't have enough vacation time	16%	28%	13%	18%	17%	16%	42%	22%	12%	3%	3%	14%
Been recently and wish to try somewhere new	5%	8%	5%	3%	2%	2%	3%	6%	2%	1%	4%	2%
Concerns about my personal safety in Reno	4%	2%	5%	5%	6%	3%	10%	5%	4%	3%	4%	3%
Reno is not welcoming to travelers like me	3%	1%	7%	1%	5%	4%	0%	5%	0%	4%	4%	3%
Other	5%	7%	8%	9%	6%	5%	5%	13%	7%	9%	6%	10%

# Reno Tahoe Next 6 Month Travel Barriers

For recent visitors to Reno Tahoe that are considering a return to the destination but not planning to visit in the next six months, the top travel barriers include having been recently and wishing to try somewhere new (28%), the cost of gas being too high (23%), and the cost of airfare being too expensive (19%). Just under one in five have been before and wish to try somewhere new (19%) or do not have enough vacation time to visit (18%).

Figure 49: Reno Tahoe Next Six Month Travel Barriers (Recent Visitors)



Question: Earlier you said you were interested in visiting Reno in the next 12 months, but not planning to travel in the next six months. What are the reasons for not planning a trip to Reno at this time? Base: Past 12-month Reno visitors, 402 respondents.



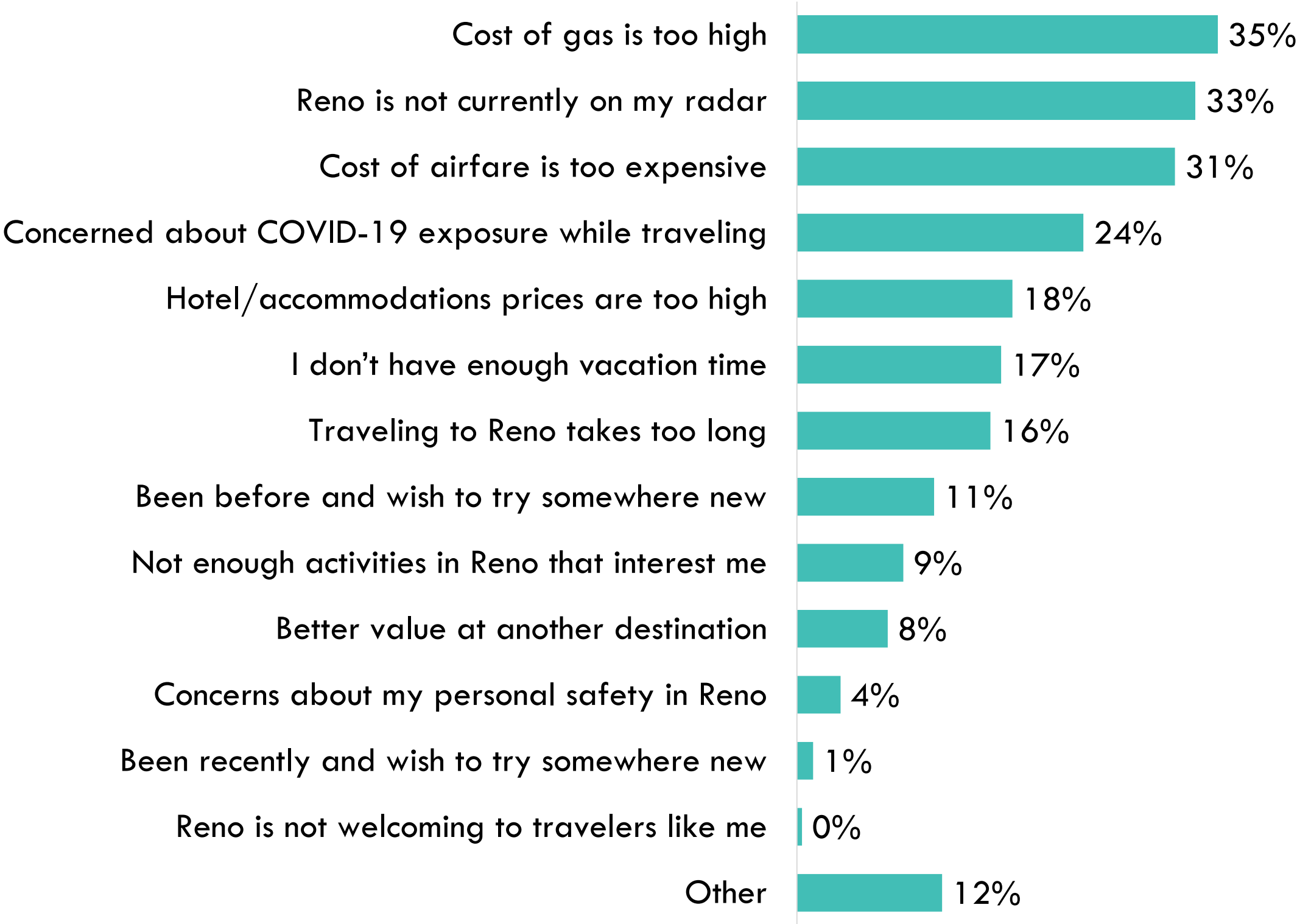
# Reno Tahoe Next 6 Month Travel Barriers by Segment

	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Been recently and wish to try somewhere new	14%	27%	33%	32%	26%	26%	34%	15%	44%	10%	31%	26%	29%
Cost of gas is too high	25%	14%	14%	19%	25%	27%	20%	37%	20%	23%	25%	47%	14%
Cost of airfare is too expensive	14%	1%	7%	40%	12%	18%	16%	29%	8%	27%	19%	3%	25%
Been before and wish to try somewhere new	7%	32%	20%	6%	22%	24%	24%	3%	37%	4%	24%	22%	18%
I don't have enough vacation time	25%	22%	17%	33%	29%	32%	22%	1%	7%	38%	9%	11%	20%
Traveling to Reno takes too long	10%	15%	12%	0%	9%	9%	16%	19%	21%	6%	22%	11%	18%
Concerned about COVID-19 exposure while traveling	12%	27%	4%	7%	7%	3%	13%	20%	4%	12%	20%	14%	14%
Hotel/accommodations prices are too high	3%	3%	6%	5%	4%	4%	13%	1%	7%	8%	19%	15%	13%
Reno is not currently on my radar	4%	0%	5%	7%	4%	7%	12%	1%	10%	16%	7%	20%	7%
Better value at another destination	1%	1%	4%	0%	3%	2%	12%	2%	4%	12%	10%	8%	10%
Not enough activities in Reno that interest me	1%	4%	1%	0%	1%	0%	2%	3%	1%	2%	1%	7%	0%
Concerns about my personal safety in Reno	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	1%	1%	0%
Reno is not welcoming to travelers like me	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	13%	0%	20%	0%	9%	0%	7%	25%	1%	13%	16%	6%	15%

# Reno Tahoe Next 12 Month Travel Barriers

For potential travelers who are considering a trip to Reno Tahoe but not planning to visit in the next six months, the top barriers include the cost of gas (35%), the price of airfare (31%), and Reno not being on their radar (33%). Around one quarter are concerned about COVID exposure while traveling (24%).

Figure 50: Reno Tahoe Next Six Month Travel Barriers (Potential Visitors)



Question: Earlier you said you were interested in visiting Reno in the next 12 months, but not planning to travel in the next six months. What are the reasons for not planning a trip to Reno at this time? Base: Not past 12-month Reno visitors, 800 respondents.

# Reno Tahoe Next 12 Month Travel Barriers by Segment

POTENTIAL VISITORS

	Audience Segments						Generational Segments				Reno Travel Segments		
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gem Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
Cost of gas is too high	37%	65%	36%	40%	36%	28%	100%	35%	39%	31%	34%	35%	35%
Cost of airfare is too expensive	34%	32%	57%	2%	38%	28%	0%	37%	21%	33%	13%	38%	31%
Reno is not currently on my radar	22%	41%	36%	19%	30%	20%	0%	34%	40%	29%	36%	32%	33%
Concerned about COVID-19 exposure while traveling	21%	21%	23%	16%	19%	7%	0%	23%	9%	33%	22%	25%	24%
I don't have enough vacation time	14%	56%	20%	54%	17%	24%	0%	19%	34%	6%	9%	20%	17%
Traveling to Reno takes too long	8%	18%	4%	25%	0%	13%	0%	10%	19%	21%	9%	19%	16%
Hotel/accommodations prices are too high	11%	12%	4%	17%	14%	17%	100%	11%	25%	17%	18%	18%	18%
Been before and wish to try somewhere new	12%	4%	11%	0%	11%	15%	0%	21%	3%	7%	15%	10%	11%
Been recently and wish to try somewhere new	0%	3%	0%	0%	1%	1%	0%	0%	0%	3%	5%	0%	1%
Better value at another destination	9%	21%	4%	14%	18%	8%	0%	1%	15%	10%	6%	8%	8%
Not enough activities in Reno that interest me	5%	31%	17%	16%	6%	7%	0%	10%	22%	1%	4%	11%	9%
Concerns about my personal safety in Reno	7%	0%	0%	0%	4%	0%	0%	3%	0%	6%	1%	5%	4%
Reno is not welcoming to travelers like me	0%	0%	2%	0%	0%	1%	0%	1%	0%	0%	2%	0%	0%
Other	7%	0%	0%	15%	7%	7%	0%	6%	7%	21%	24%	7%	12%



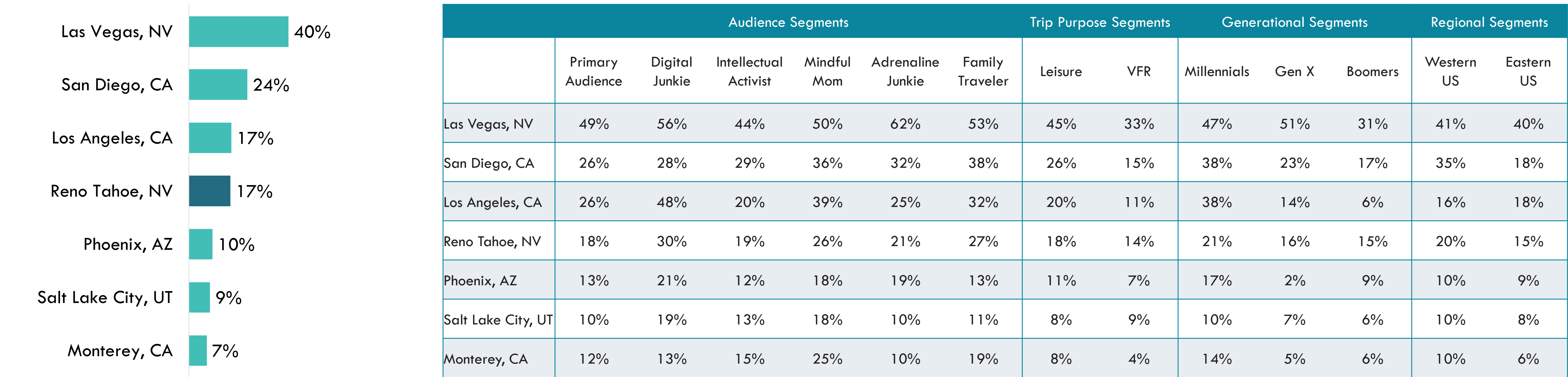
# MARKETING RECALL



# Unaided Advertising Recall (Past 12 Months)

One fifth of past 12-month Reno Tahoe visitors recall seeing an ad for the destination unaided. Unaided recall for major competitor destinations was higher, including Las Vegas (40%), San Diego (24%), and Los Angeles (17%). Within the various segments, Reno Tahoe unaided ad recall was highest among Digital Junkies (30%), Family Travelers (27%), and Mindful Moms (26%).

Figure 51: Past Year Unaided Advertising Recall (Recent Visitors)

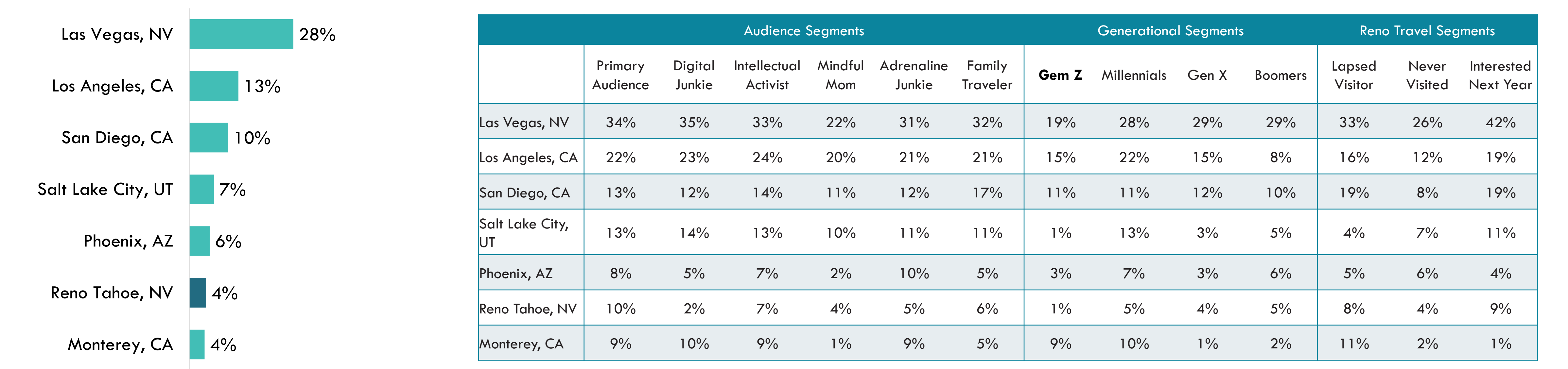


Question: Do you recall seeing advertising (such as online ads, billboards, magazine ads, TV commercials, or sponsored social media posts) for any of the following destinations in the past 12 months? Base: Past 12-month Reno visitors, 402 respondents.

# Unaided Advertising Recall (Past 12 Months)

Less than one in ten potential Reno Tahoe visitors recalled seeing an ad unaided for the destination in the past year (4%). Ad recall for major destinations was much higher, including Las Vegas (28%), Los Angeles (13%), and San Diego (10%). Unaided ad recall for both Salt Lake City (7%) and Phoenix (6%) was also higher than Reno. Among those interested in visiting in the next year, ad recall was higher at nine percent.

Figure 52: Past Year Unaided Advertising Recall (Potential Visitors)

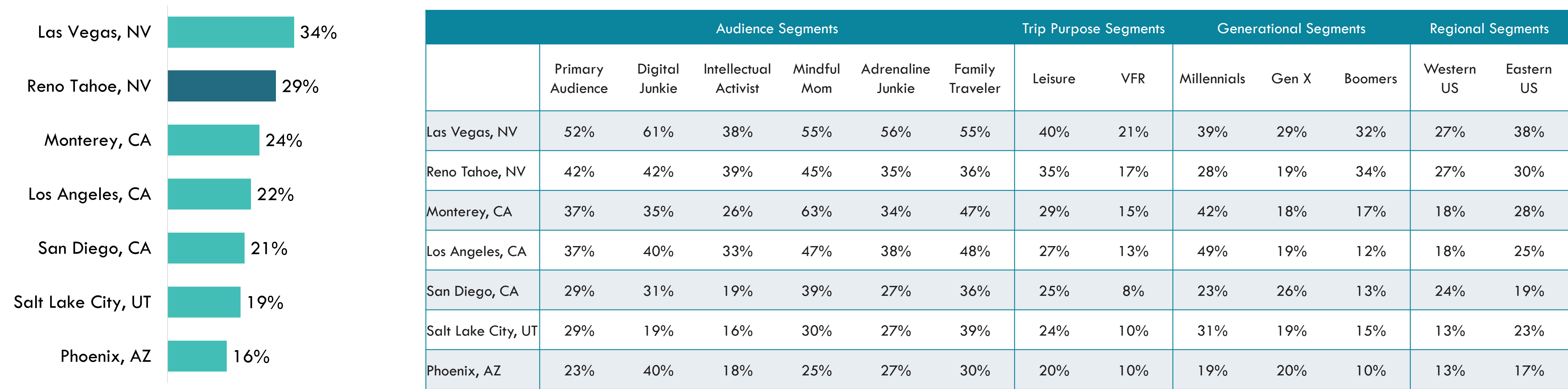


Question: Do you recall seeing advertising (such as online ads, billboards, magazine ads, TV commercials, or sponsored social media posts) for any of the following destinations in the past 12 months? Base: Not past 12-month Reno visitors, 800 respondents.



Nearly one third of past 12-month Reno Tahoe visitors went to the official destination website in the past year (29%), just behind Las Vegas (34%) and ahead of every other competitor. Reno Tahoe website usage was highest among Mindful Moms (45%), the Primary Audience (42%), and Digital Junkies (42%).

Figure 53: Past Year Destination Website Usage (Recent Visitors)

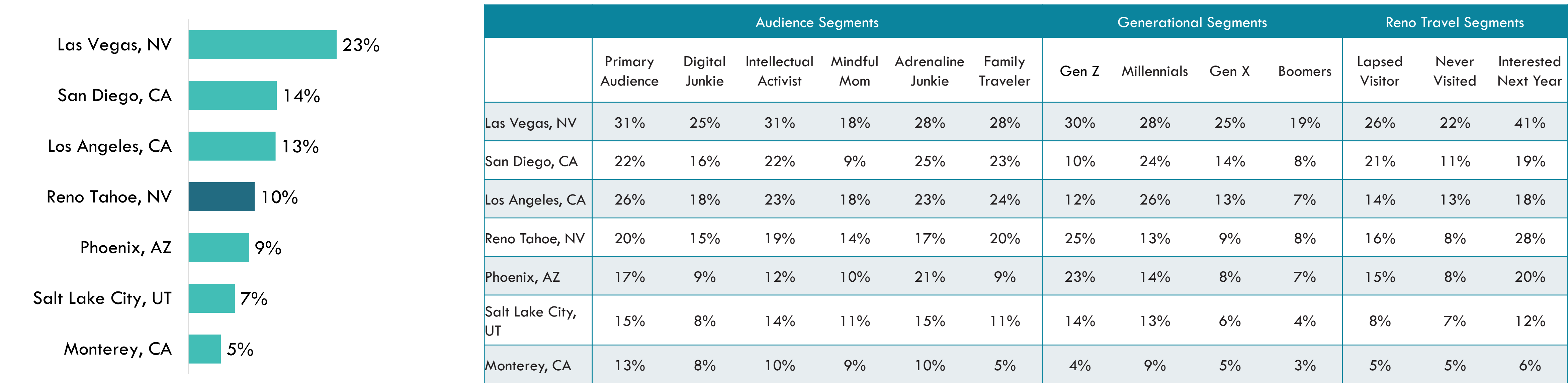


Question: Have you visited the official destination website and/or social media channels for the following destinations in the past 12 months? Base: Past 12-month Reno visitors, 402 respondents.

# Owned Media Recall – Website

One in ten potential travelers visited the official Reno Tahoe destination website in the past year. This is behind Las Vegas (23%), San Diego (14%), and Los Angeles (13%). Use of Reno Tahoe’s official website was higher among those interested in visiting in the next 12 months, at 28 percent.

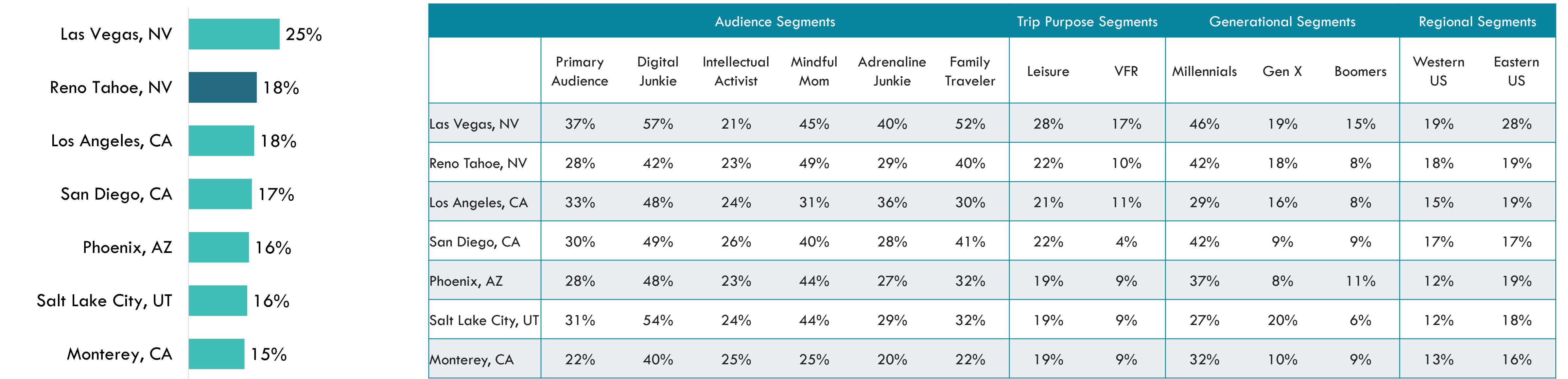
Figure 54: Past Year Destination Website Usage (Potential Visitors)



Question: Have you visited the official destination website and/or social media channels for the following destinations in the past 12 months? Base: Not past 12-month Reno visitors, 800 respondents.

Nearly one fifth of past 12-month Reno Tahoe visitors went to the destination’s official social channels (18%), just behind Las Vegas (25%) and ahead of every other competitor. Reno Tahoe social channel usage was highest among Mindful Moms (49%), Millennials (42%), and Digital Junkies (42%).

Figure 55: Past Year Destination Social Channel Usage (Recent Visitors)

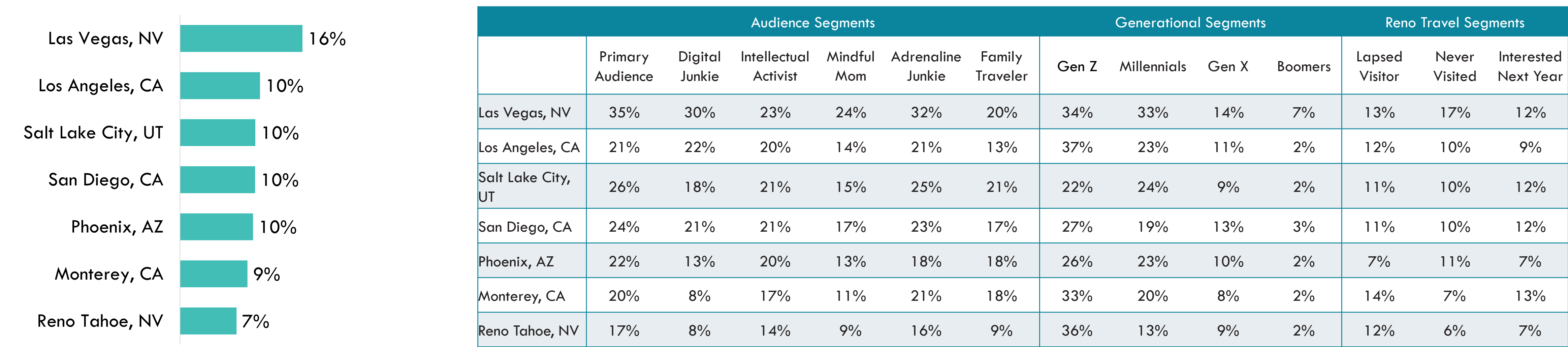


Question: Have you visited the official destination website and/or social media channels for the following destinations in the past 12 months? Base: Past 12-month Reno visitors, 402 respondents.



Less than one in ten potential travelers visited the official Reno Tahoe destination social channels (7%), the lowest of any competitor. Reno Tahoe social channel usage was comparable among those interested in visiting in the next 12 months.

Figure 56: Past Year Destination Social Channel Usage (Potential Visitors)



Question: Have you visited the official destination website and/or social media channels for the following destinations in the past 12 months? Base: Not past 12-month Reno visitors, 800 respondents.

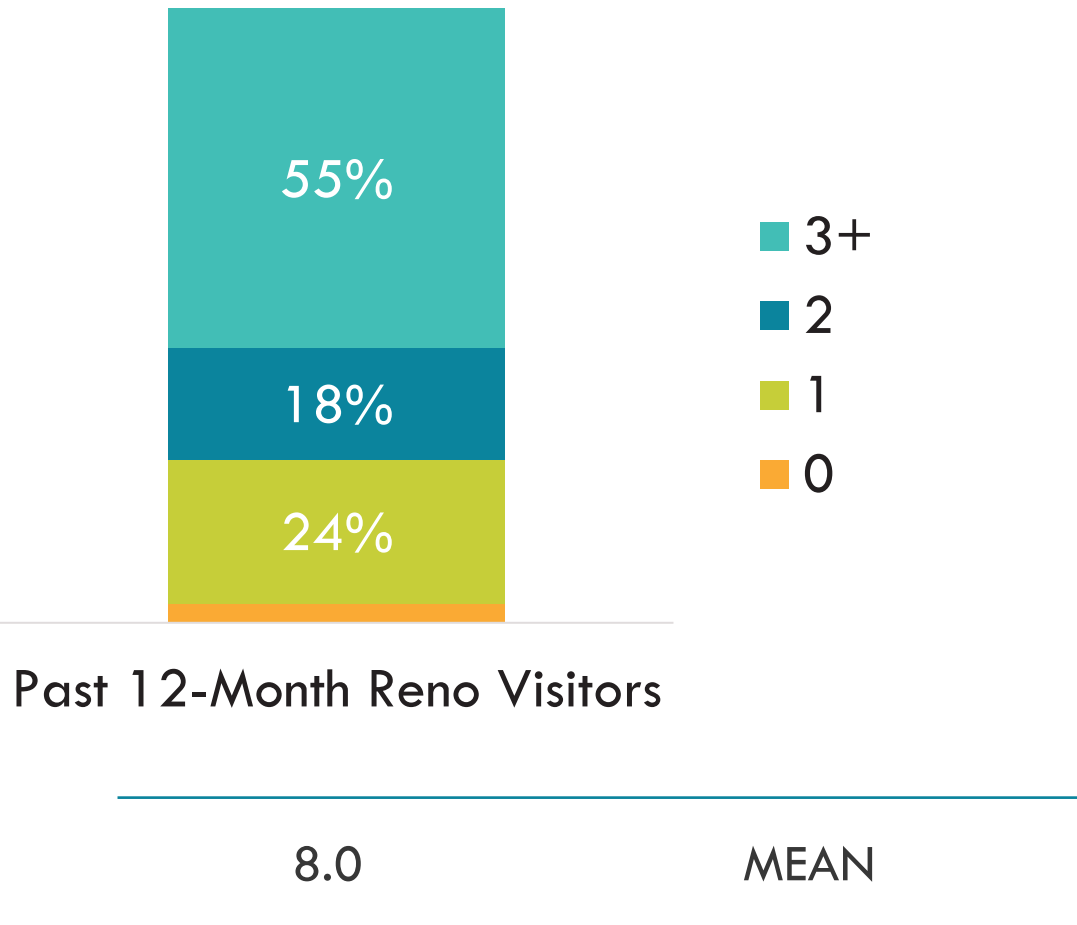
A wide-angle photograph of a hot air balloon festival. The sky is filled with numerous hot air balloons of various colors and patterns, including stripes, polka dots, and solid colors. Some balloons have text on them, such as "WELLS FARGO" and "FISH". The balloons are scattered across the frame, with some closer to the ground and others higher up. In the foreground, a large crowd of people is gathered in a grassy field, watching the event. The background shows a range of mountains under a clear blue sky. The text "RENO TAHOE TRIP DETAILS" is overlaid in the center of the image in a white, sans-serif font.

# RENO TAHOE TRIP DETAILS

# Lifetime Overnight Trips to Reno Tahoe

On average, past 12-month visitors to Reno Tahoe have visited the destination 8.0 times overnight as an adult. Lifetime overnight trips to Reno Tahoe is highest among Western U.S. visitors (13.4 trips) and lowest among Millennials (4.2 trips).

Figure 57: Lifetime Overnight Trips to Reno Tahoe (Recent Visitors)



	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
3+	54%	51%	56%	42%	50%	43%	58%	56%	47%	57%	63%	71%	47%
2	25%	23%	29%	27%	22%	30%	18%	28%	31%	16%	15%	14%	20%
1	20%	21%	13%	30%	24%	26%	21%	13%	22%	27%	19%	11%	30%
0	1%	6%	2%	1%	4%	1%	3%	3%	0%	1%	3%	4%	3%
Mean	6.4	5.1	6.7	4.9	5.3	4.4	8.4	7.6	4.2	7.4	11.0	13.4	5.2

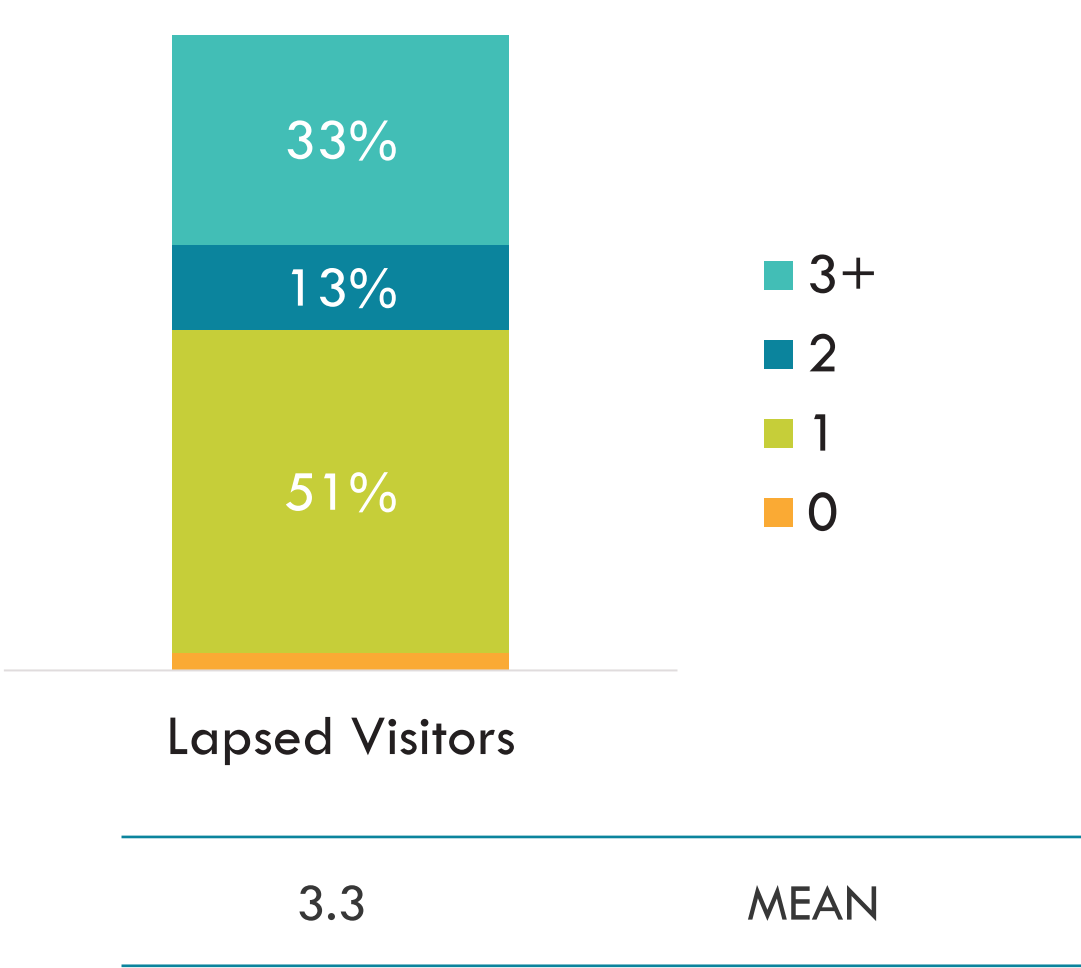
Question: Approximately how many overnight trips have you taken to the Reno Tahoe region as an adult (that is, after age 18)? Base: Past 12-month Reno visitors, 386 respondents.



# Lifetime Overnight Trips to Reno Tahoe

On average, lapsed visitors to Reno Tahoe have visited the destination 3.3 times overnight as an adult. Lifetime overnight trips to Reno Tahoe is highest among those interested in visiting in the next year (4.4 trips).

Figure 58: Lifetime Overnight Trips to Reno Tahoe (Lapsed Visitors)



	Audience Segments						Generational Segments			Reno Travel Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	*Mindful Mom	Adrenaline Junkie	Family Traveler	Millennials	Gen X	Boomers	Lapsed Visitor	Interested Next Year
3+	35%	34%	30%	58%	31%	29%	22%	36%	33%	33%	36%
2	25%	7%	17%	12%	17%	18%	27%	12%	10%	13%	16%
1	39%	47%	52%	30%	52%	53%	51%	51%	52%	51%	48%
0	1%	12%	1%	0%	1%	0%	0%	1%	4%	3%	0%
Mean	3.4	2.5	3.1	3.3	2.7	2.3	2.3	3.2	3.6	3.3	4.4

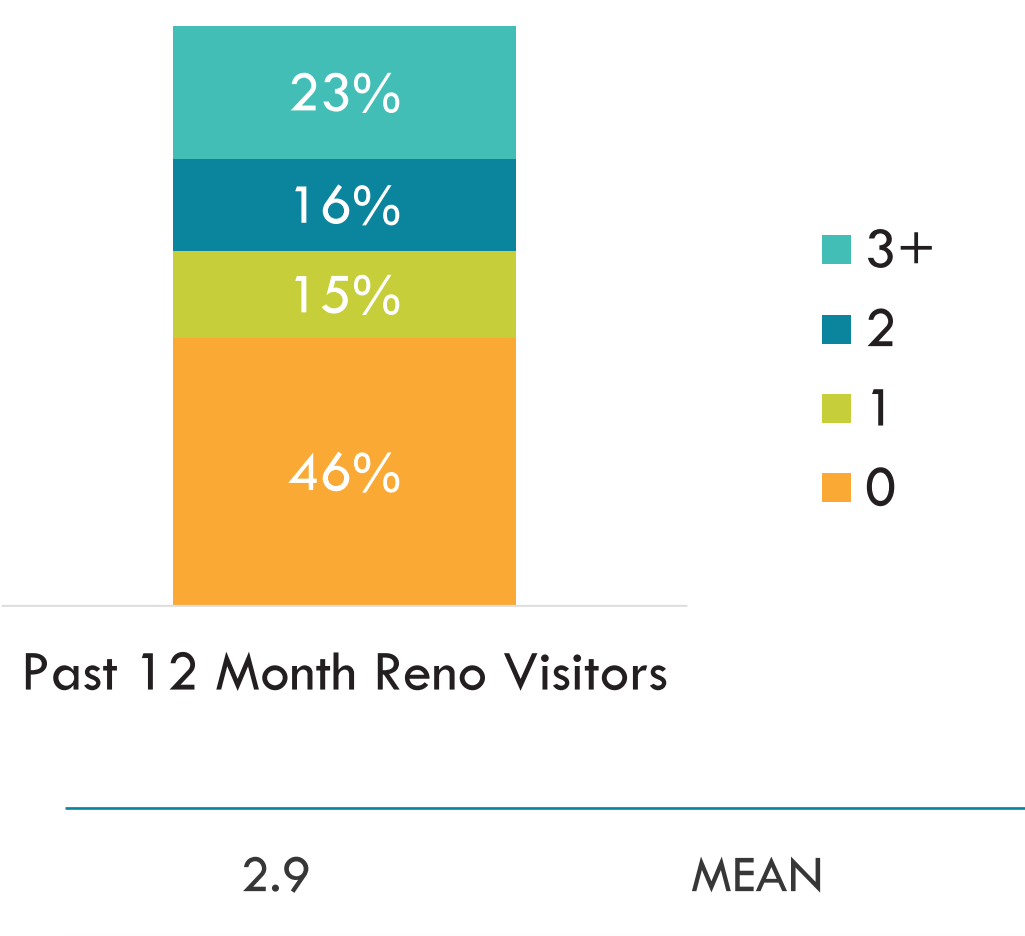
\* Small Sample Size

Question: Approximately how many overnight trips have you taken to the Reno Tahoe region as an adult (that is, after age 18)? Base: Lapsed Reno visitors, 295 respondents.

# Lifetime Day Trips to Reno Tahoe

On average, past 12-month visitors have taken 2.9 day trips to Reno Tahoe as an adult. Lifetime day trips to Reno Tahoe is highest among Western U.S. visitors (5.8 trips) and lowest among Eastern U.S. visitors (1.5 trips).

Figure 59: Lifetime Day Trips to Reno Tahoe (Recent Visitors)



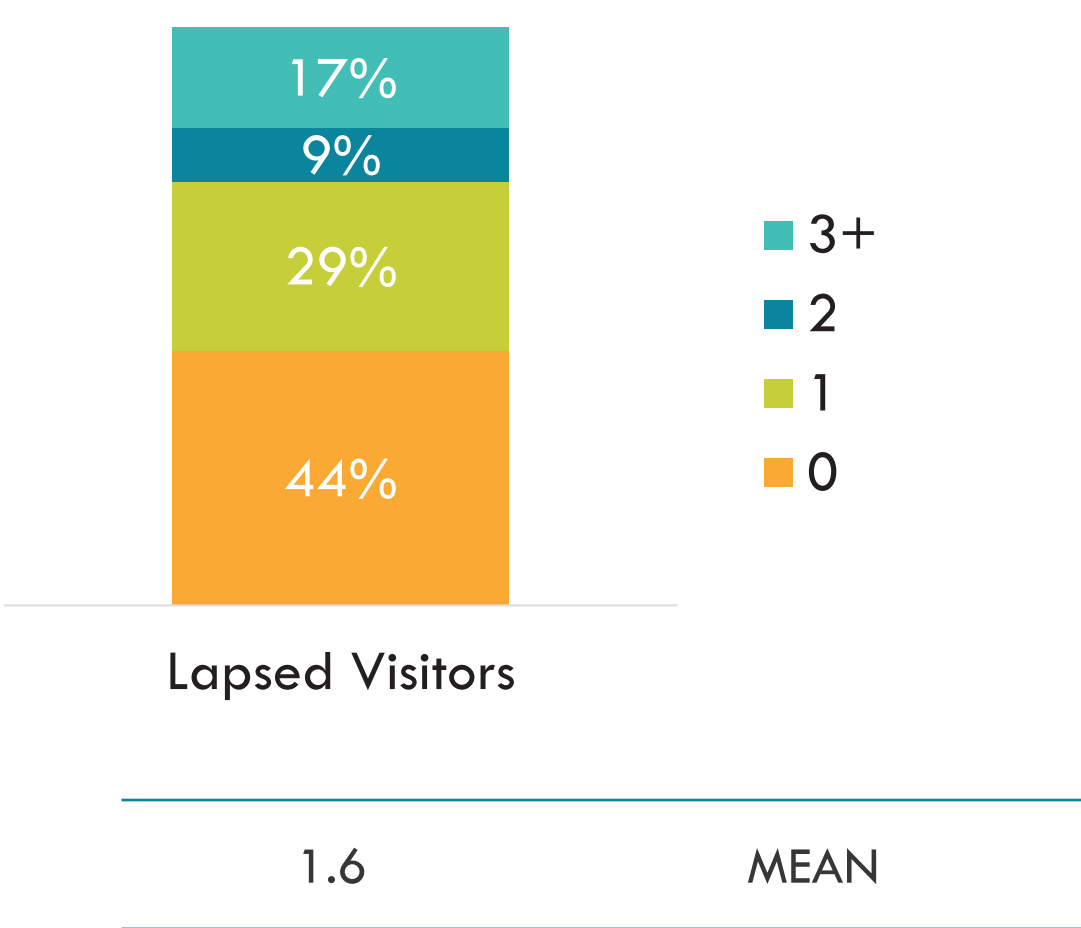
Audience Segments							Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
3+	26%	27%	19%	31%	30%	34%	25%	20%	32%	26%	18%	40%	14%
2	26%	28%	26%	18%	27%	17%	17%	22%	34%	9%	13%	10%	19%
1	18%	25%	18%	25%	16%	21%	14%	13%	19%	9%	13%	13%	16%
0	29%	20%	37%	26%	27%	28%	44%	45%	15%	56%	56%	37%	51%
Mean	3.2	3.1	2.2	3.5	3.3	3.2	2.8	2.6	3.9	2.7	2.7	5.8	1.5

Question: Approximately how many day trips have you taken to the Reno Tahoe region as an adult (that is, after age 18)? Base: Past 12-month Reno visitors, 384 respondents.

# Lifetime Day Trips to Reno Tahoe

On average, lapsed visitors have taken 1.6 day trips to Reno Tahoe as an adult. Lifetime day trips to Reno Tahoe is highest among Gen X (2.2 trips) and lowest among Boomers (1.3 trips).

Figure 60: Lifetime Day Trips to Reno Tahoe (Lapsed Visitors)



	Audience Segments						Generational Segments			Reno Travel Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	*Mindful Mom	Adrenaline Junkie	Family Traveler	Millennials	Gen X	Boomers	Lapsed Visitor	Interested Next Year
3+	23%	21%	16%	42%	24%	19%	20%	27%	12%	17%	23%
2	11%	11%	9%	8%	21%	20%	13%	9%	8%	9%	17%
1	25%	49%	33%	26%	20%	51%	38%	42%	23%	29%	37%
0	41%	19%	42%	24%	35%	10%	29%	23%	57%	44%	23%
Mean	2.1	2.0	1.6	3.1	1.8	2.1	1.7	2.2	1.3	1.6	2.4

\* Small Sample Size

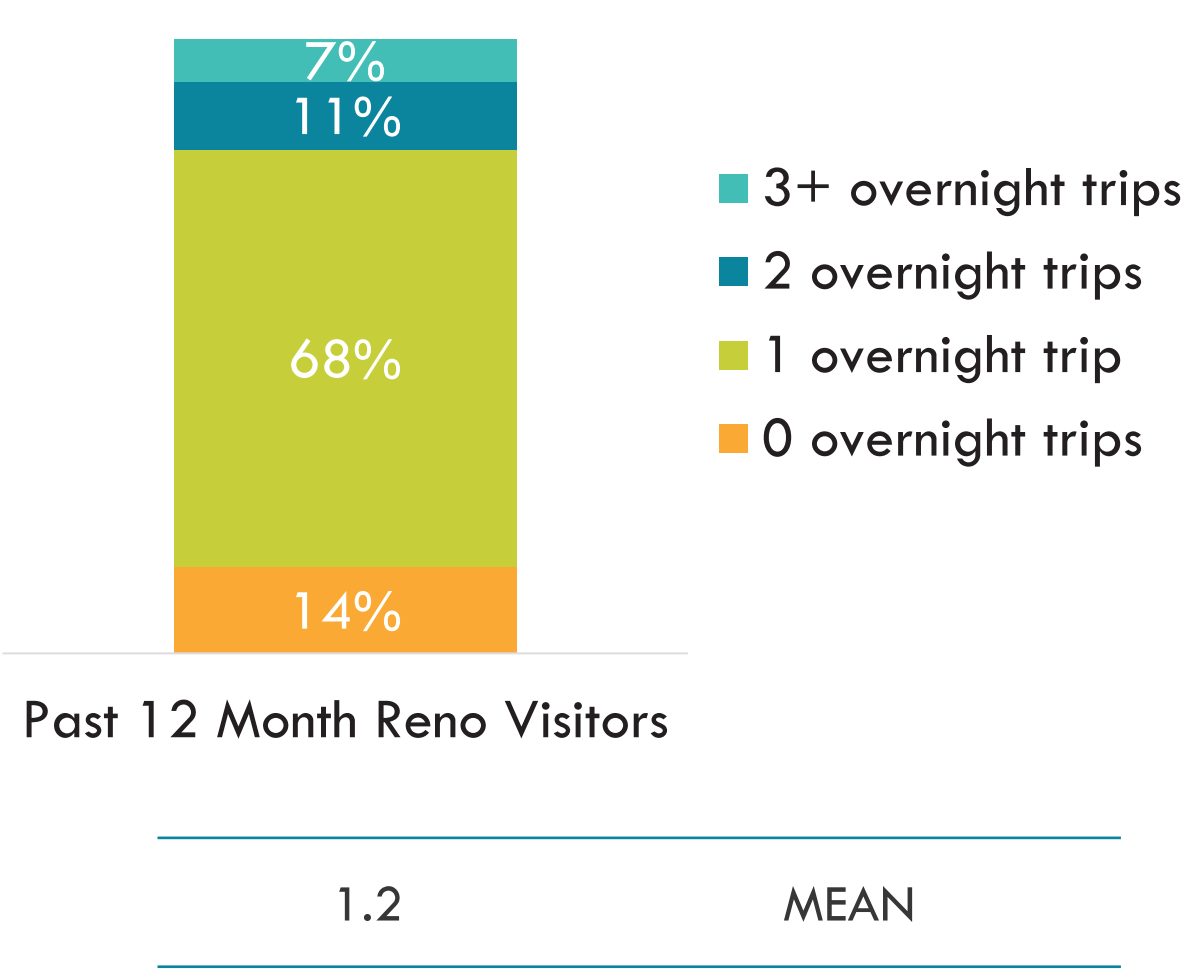
Question: Approximately how many overnight trips have you taken to the Reno Tahoe region as an adult (that is, after age 18)? Base: Lapsed Reno visitors, 295 respondents.



# Past 12 Month Overnight Trips to Reno Tahoe

**Past 12-month visitors to Reno Tahoe took on average 1.2 overnight trips to the area in the last year.** Western U.S. residents reported slightly higher repeat visitation, with 1.6 overnight trips on average, followed by the VFR segment (1.5 overnight trips).

Figure 61: Past 12 Month Overnight Trips to Reno Tahoe (Recent Visitors)



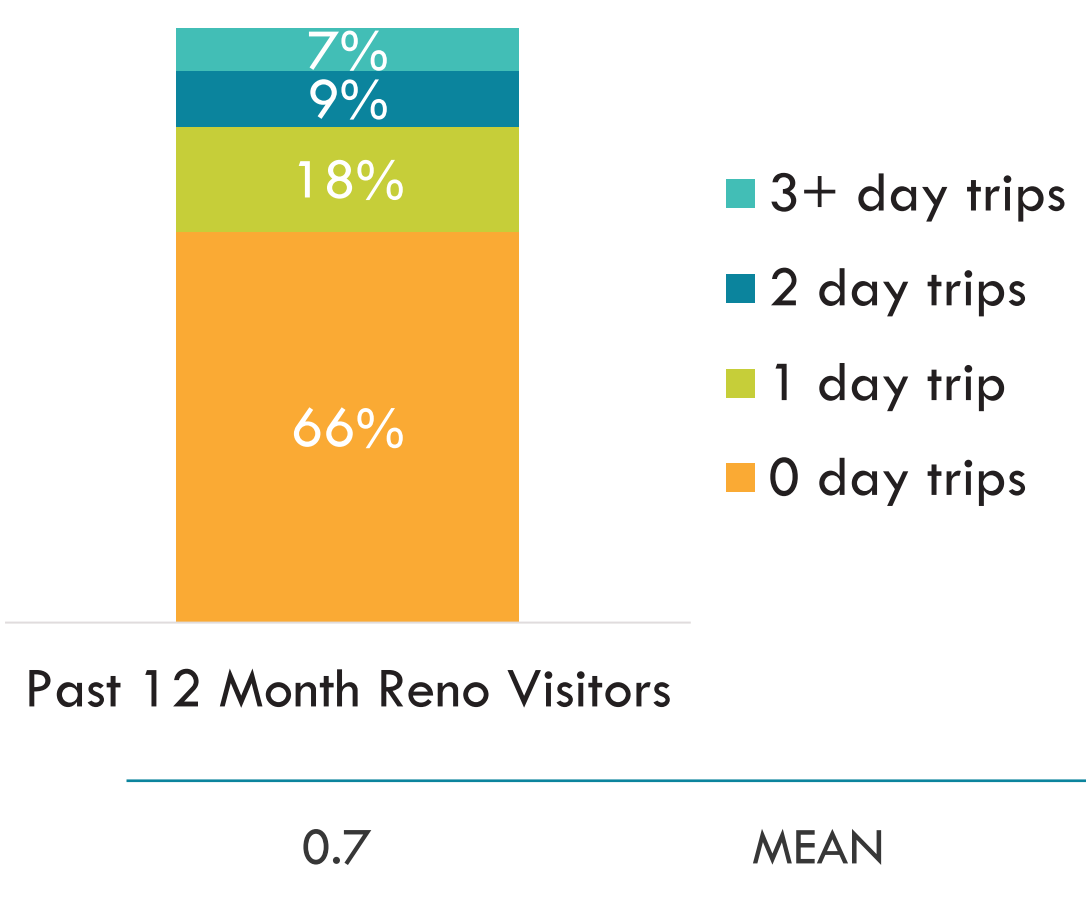
	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
3+	6%	8%	4%	7%	7%	5%	4%	19%	12%	8%	4%	13%	4%
2	14%	21%	8%	14%	11%	9%	13%	5%	12%	13%	11%	13%	10%
1	70%	60%	76%	75%	68%	80%	69%	58%	63%	75%	68%	60%	72%
0	10%	11%	12%	5%	14%	6%	14%	18%	13%	5%	18%	14%	14%
Mean	1.2	1.4	1.2	1.3	1.2	1.2	1.1	1.5	1.4	1.4	1.1	1.6	1.1

Question: How many overnight trips have you taken to the Reno Tahoe region in the past 12 months? Base: Past 12-month Reno visitors, 402 respondents.

# Past 12 Month Day Trips to Reno Tahoe

These recent Reno Tahoe visitors took on average 0.7 day trips to the area. Millennials (1.2 day trips) and Digital Junkies (1.1 trips) reported a slightly higher number of day trips to the region.

Figure 62: Past 12 Month Day Trips to Reno Tahoe (Recent Visitors)



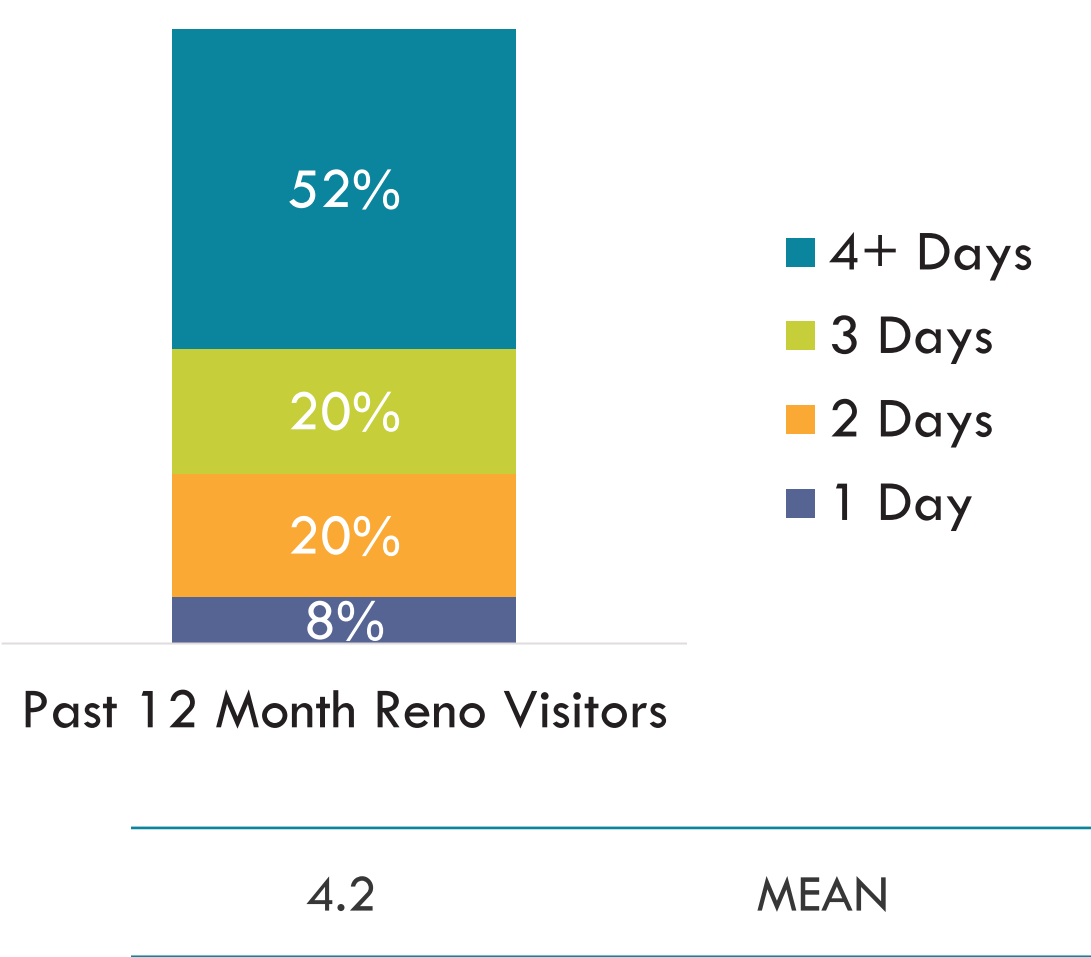
Audience Segments							Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
3+	10%	9%	7%	7%	9%	15%	7%	10%	13%	9%	3%	11%	5%
2	17%	20%	12%	8%	16%	7%	11%	7%	15%	5%	11%	9%	10%
1	22%	30%	19%	36%	23%	25%	17%	17%	26%	8%	16%	22%	16%
0	51%	41%	63%	50%	52%	53%	65%	66%	46%	77%	70%	58%	70%
Mean	1.0	1.1	0.7	1.0	0.9	1.0	0.6	0.8	1.2	0.5	0.6	1.0	0.5

Question: How many day trips have you taken to the Reno Tahoe region in the past 12 months? Base: Past 12-month Reno visitors, 402 respondents.

# Length of Stay - Days

On average, past 12-month visitors to Reno Tahoe stayed 4.2 days in-market on their last trip. Average length of stay was highest among the VFR segment (5.1 days), followed by Boomers (4.7 days), and Eastern U.S. visitors (4.5 days).

Figure 63: Average Length of Stay—Days (Recent Visitors)



	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
4+	57%	48%	47%	47%	48%	45%	49%	66%	31%	53%	63%	39%	59%
3	17%	17%	21%	12%	24%	12%	20%	17%	25%	19%	18%	29%	16%
2	20%	30%	27%	26%	20%	26%	23%	13%	33%	22%	12%	22%	19%
1	6%	5%	6%	15%	8%	16%	9%	5%	11%	6%	6%	10%	6%
Mean	4.1	4.0	3.8	3.7	3.9	3.5	4.0	5.1	3.2	4.3	4.7	3.6	4.5

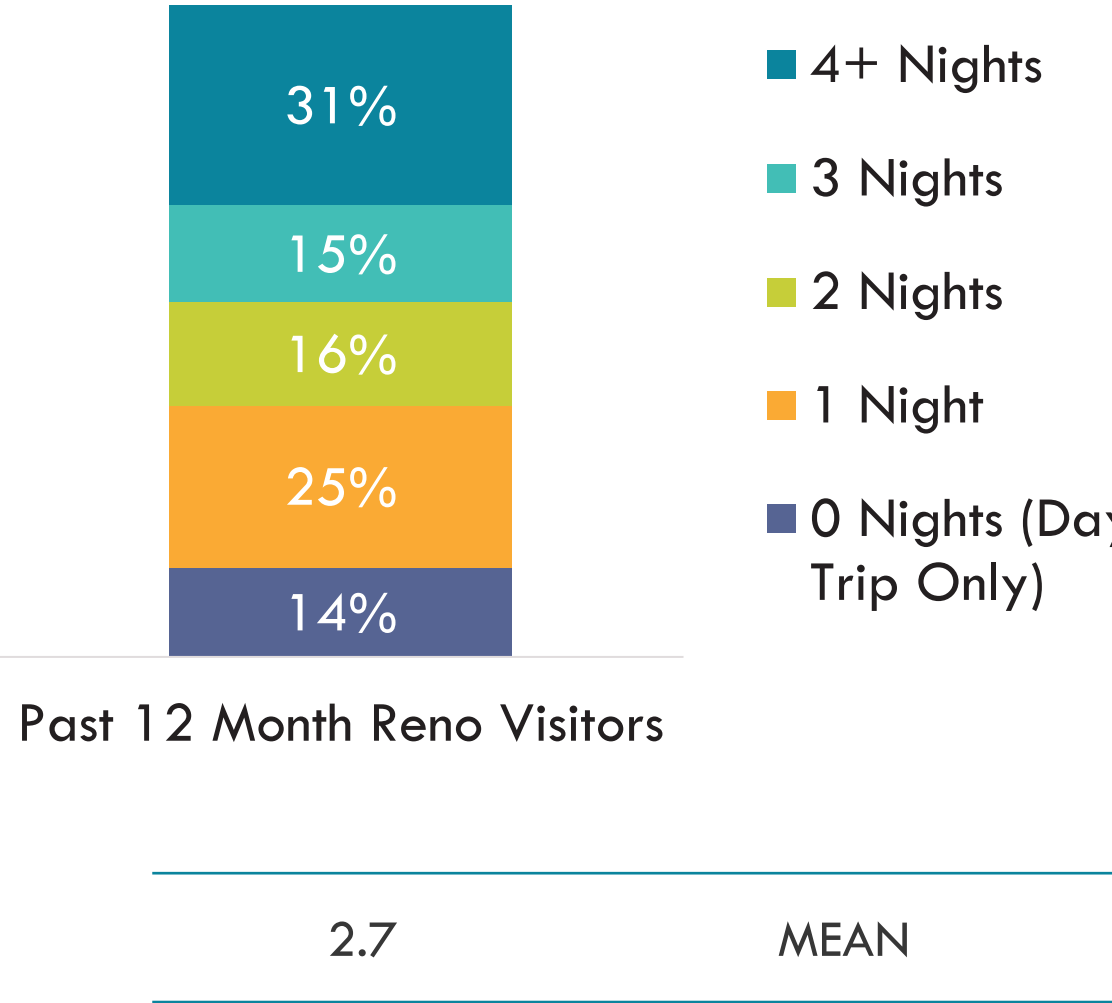
Question:: On your last trip, how many days and nights did you spend in the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.



# Length of Stay - Nights

On average, past 12-month visitors to Reno Tahoe stayed 2.7 nights on their last trip. Average length of stay was highest among the VFR segment (3.5 nights), followed by Boomers (3.3 nights), and Eastern U.S. visitors (3.1 nights).

Figure 64: Average Length of Stay—Nights (Recent Visitors)



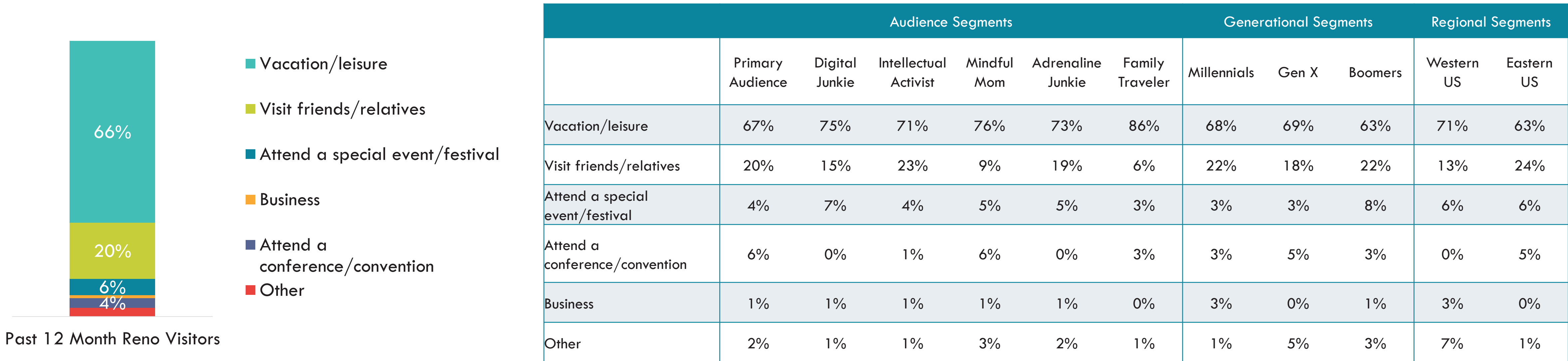
Audience Segments							Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
4+	26%	23%	20%	20%	27%	17%	29%	45%	10%	29%	43%	19%	37%
3	22%	19%	15%	24%	18%	20%	16%	14%	17%	18%	12%	10%	18%
2	15%	14%	27%	12%	13%	16%	12%	18%	17%	10%	20%	20%	14%
1	25%	37%	24%	17%	33%	22%	29%	13%	35%	32%	12%	33%	20%
0	13%	7%	14%	26%	10%	24%	15%	10%	21%	11%	12%	18%	12%
Mean	2.5	2.6	2.3	2.3	2.4	2.0	2.6	3.5	1.8	2.6	3.3	2.1	3.1

Question: : On your last trip, how many days and nights did you spend in the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.

# Primary Purpose of Trip

Two thirds of past 12-month Reno Tahoe visitors visited the area for leisure purposes (66%), while 20 percent were visiting friends/family in the region. Less than one in ten visited to attend a special event/festival (6%), attend a conference/convention (4%), or for business (1%). Family Travelers (86%), Mindful Moms (76%), and Digital Junkies (75%) were more likely to be visiting for leisure purposes.

Figure 65: Primary Purpose of Trip (Recent Visitors)

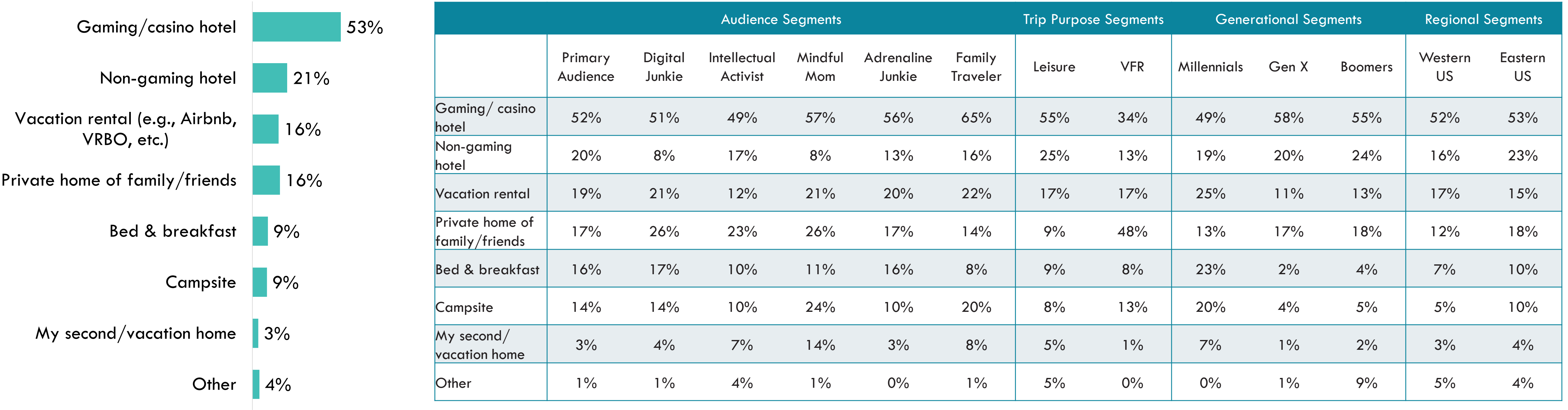


Question: What was the primary purpose of your last visit to the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.

# Accommodation Type

Of those who visited Reno Tahoe overnight in the past 12 months, the most common lodging type included gaming/casino hotels (53%), followed distantly by non-gaming hotels (21%). Less than one fifth stayed in a vacation rental (16%), private home of family/friends (16%), a bed and breakfast (9%), or campsite (3%).

Figure 66: Accommodation Type (Recent Overnight Visitors)



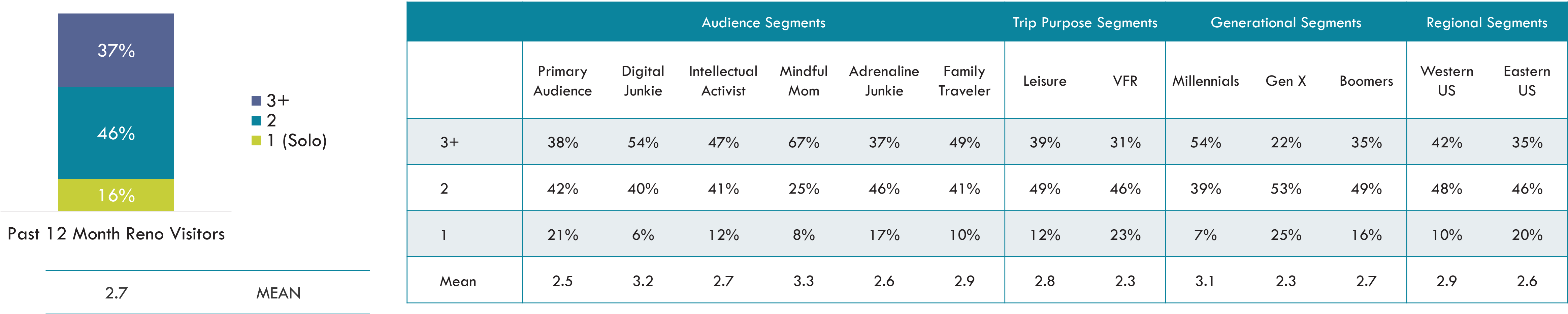
Question: What type of lodging/accommodations did you stay in on your last overnight trip to the Reno Tahoe region? Base: Past 12-month overnight Reno visitors, 319 respondents.



# Travel Party Size

**On average, past 12-month visitors to Reno Tahoe traveled in a party of 2.7 people.** Just under half traveled as a pair (46%), while one third traveled in a group of three or more (37%). Average party size was greatest among Mindful Mom (3.3) and Digital Junkie (3.2) visitors.

Figure 67: Travel Party Size (Recent Visitors)

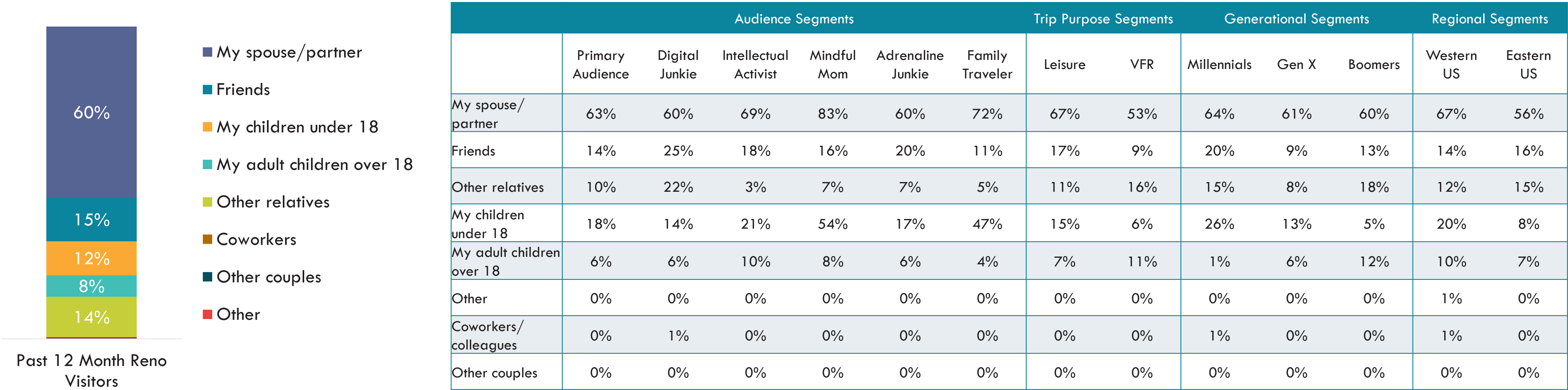


Question: Including yourself, how many people were in your travel party on your last visit to the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.

# Travel Party Composition

Six in ten recent visitors traveled to the area with their spouse/partner on their last trip (60%), while 15 percent visited Reno Tahoe with friends, 14 percent with other relatives, and 12 percent with children under the age of 18. Mindful Moms (54%) and Family Travelers (47%) were most likely to visit with children, while Digital Junkies were most likely to visit with friends (25%).

Figure 68: Travel Party Composition (Recent Visitors)

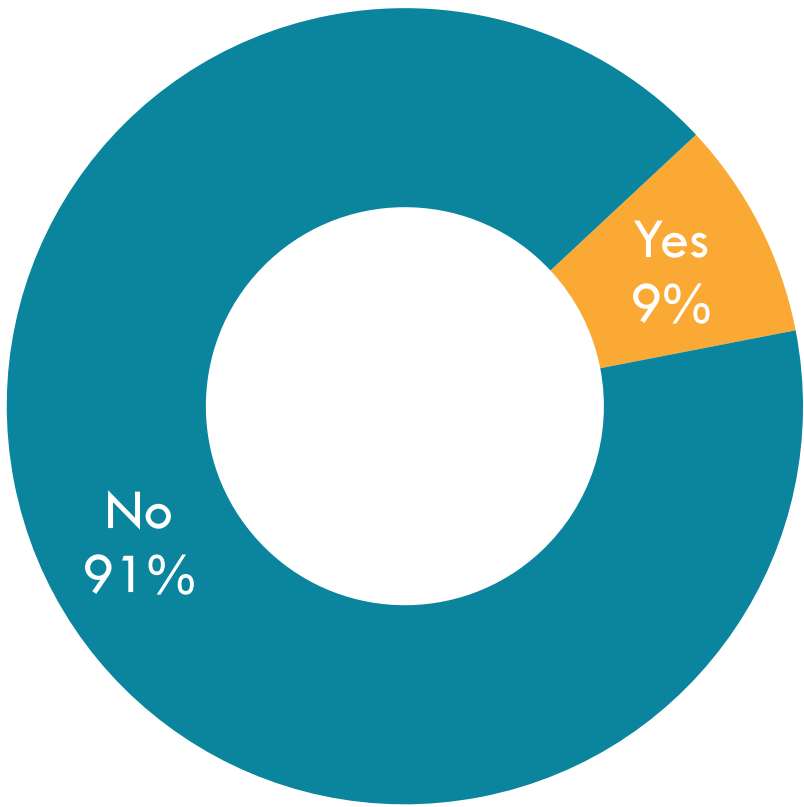


Question: Who did you travel with on your last visit to the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.

# Traveled with Pet

Less than one in ten past 12-month visitors to Reno Tahoe visited with a pet (9%). This percentage was highest among Western U.S. (13%) and Digital Junkie (12%) visitors.

Figure 69: Traveled with Pet (Recent Visitors)



	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Yes	6%	12%	7%	5%	8%	5%	10%	4%	10%	9%	6%	13%	7%
No	94%	88%	93%	95%	92%	95%	90%	96%	90%	91%	94%	87%	93%

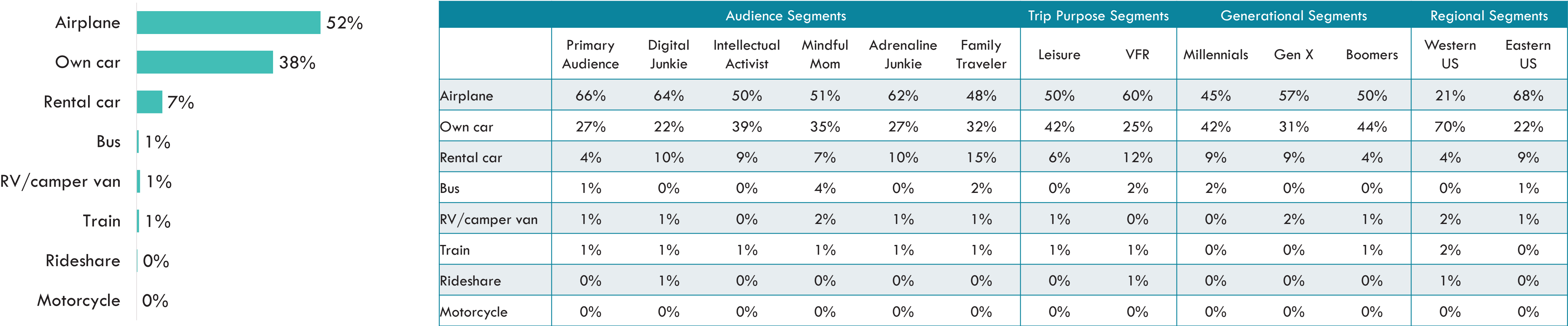
Question: Did you travel with a pet on your last visit to the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.



# Arrival Transportation

Over half of past 12-month visitors arrived in Reno Tahoe via airplane (52%), while 38 percent arrived via their own car, and seven percent by rental car. Eastern U.S. visitors were much more likely to arrive via plane (68%) compared to Western U.S. visitors (21%).

Figure 70: Arrival Transportation Recent Visitors

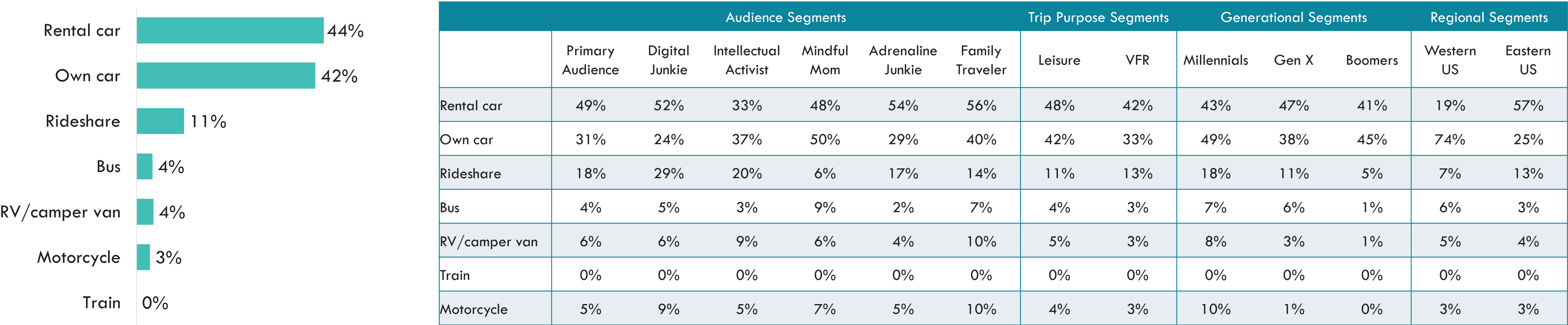


Question: On your last trip, what types of transportation did you use to arrive, travel within, and depart the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.

# In-Destination Transportation

**Just under half of past 12-month visitors used a rental car (44%) or their own car (42%) in-destination on their last trip to Reno Tahoe.** Just over one in ten used a rideshare service (11%). Rental car usage was highest among Eastern U.S. visitors (57%), while own car usage was highest among Western U.S. visitors (74%).

Figure 71: In-Destination Transportation Recent Visitors

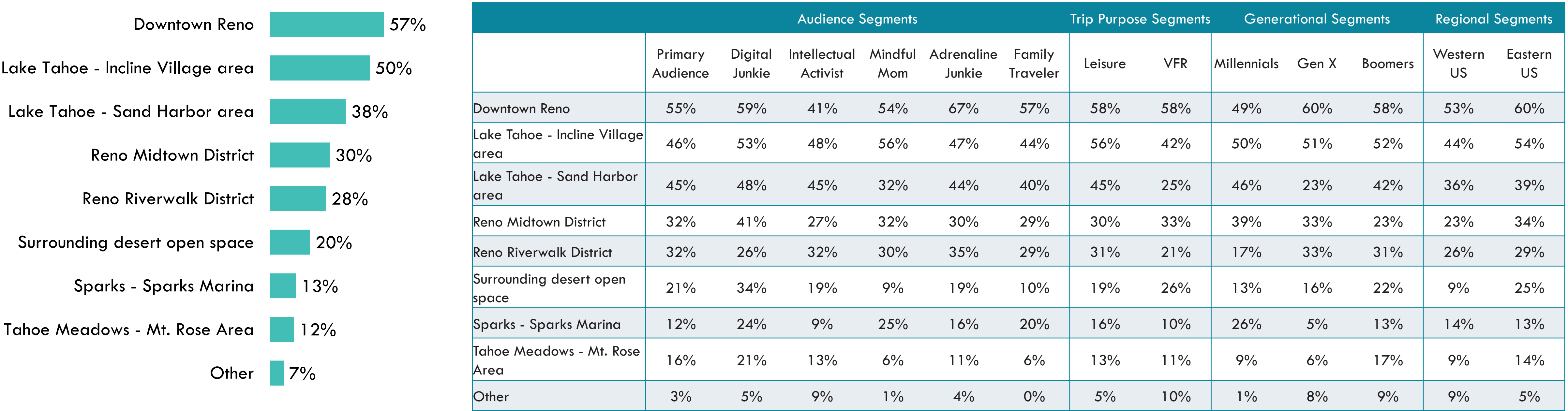


Question: On your last trip, what types of transportation did you use to arrive, travel within, and depart the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.

# Reno Tahoe Areas Visited

Over half of past 12-month Reno Tahoe travelers visited downtown Reno on their last trip (57%), followed by Lake Tahoe-Incline Village (50%), and Lake Tahoe-Sand Harbor (38%). Over one quarter went to Reno’s Midtown District (30%) and/or Riverwalk District (28%). A smaller percentage visited the surrounding desert open space (20%), Sparks (13%), and/or Tahoe Meadows (12%).

Figure 72: Reno Tahoe Areas Visited (Recent Visitors)



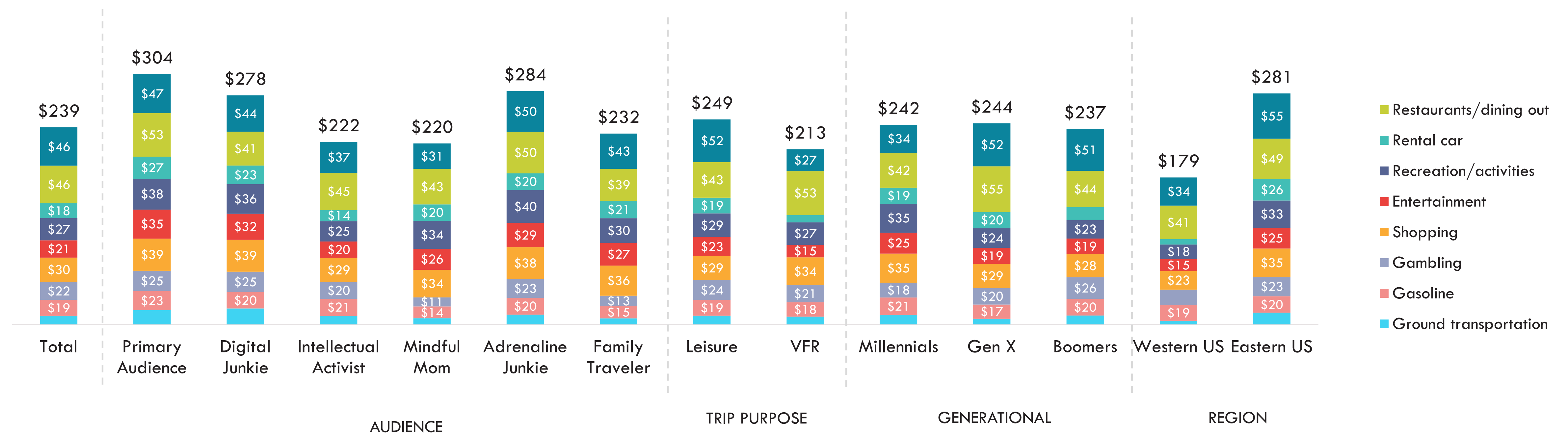
Question: Did you visit any of the following areas on your last trip to the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.



# Average Daily Spend Per Person

On average, recent visitors spent **\$239 per person per day in-destination**. This was highest among the Primary Audience (\$304), Eastern U.S. visitors (\$281), Adrenaline Junkies (\$284), and Digital Junkies (\$278). Average daily personal spend was lowest among Western U.S. visitors (\$179).

Figure 73: Average Daily Spend Per Person (Recent Visitors)

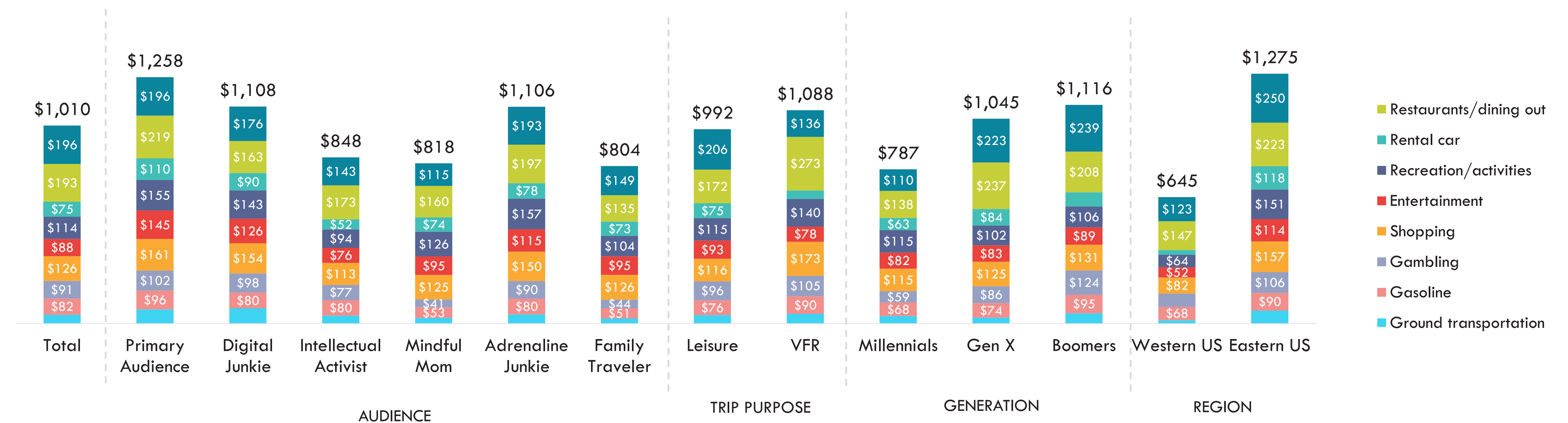


Question: On your last trip, approximately how much did you spend PER DAY in the Reno Tahoe region on each of the following categories? Base: All past 12-month Reno visitors, 402 respondents.

# Average Trip Spend Per Person

When accounting for average length of stay, recent visitors spent an average of \$1,010 per person per trip in-destination. This was highest among Eastern U.S. visitors (\$1,275) and the Primary Audience (\$1,258). Per person per trip spend was lowest among Western U.S. visitors (\$645).

Figure 74: Average Trip Spend Per Person (Recent Visitors)

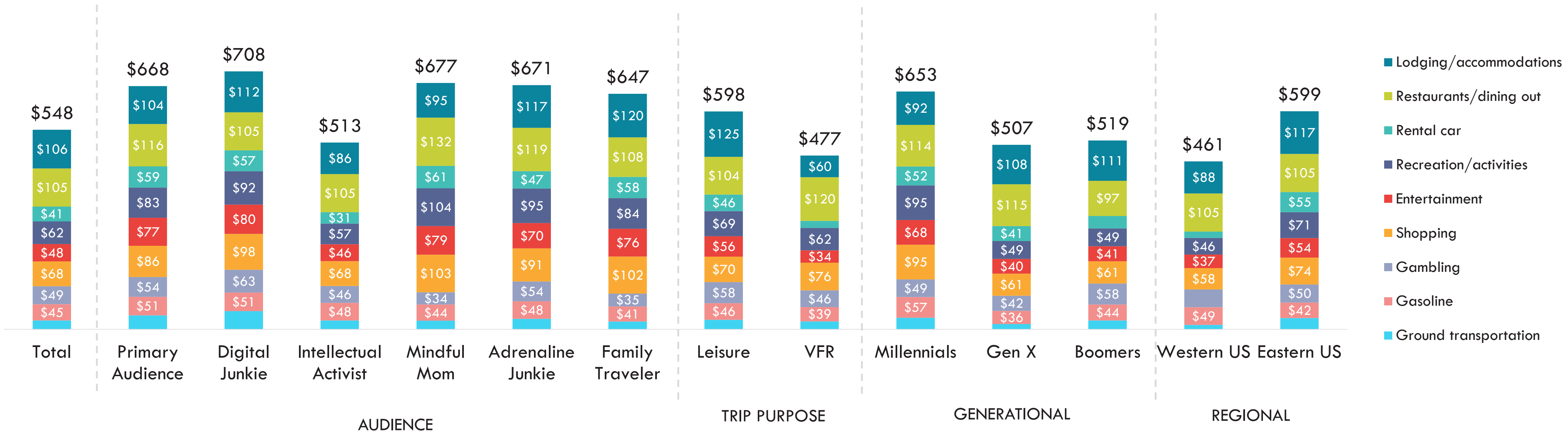


Question: On your last trip, approximately how much did you spend PER DAY in the Reno Tahoe region on each of the following categories? Base: All past 12-month Reno visitors, 402 respondents.

# Average Daily Spend Per Party

When accounting for party size, past 12-month visitors to Reno Tahoe spent an average of **\$548 per party per day in-destination**. This was highest among Digital Junkies (\$708) and Mindful Moms (\$677). Daily party spend was lowest among VFR (\$477) and Western U.S. visitors (\$461).

Figure 75: Average Daily Spend Per Party (Recent Visitors)



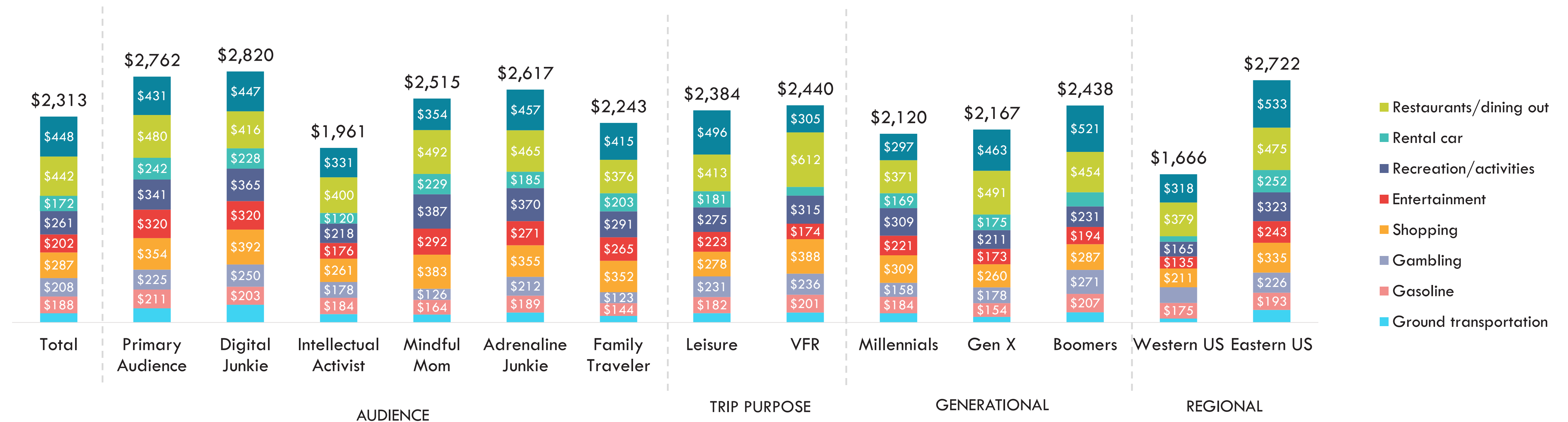
Question: On your last trip, approximately how much did you spend PER DAY in the Reno Tahoe region on each of the following categories? Base: All past 12-month Reno visitors, 402 respondents.



# Average Trip Spend Per Party

When accounting for party size and average length of stay, past 12-month visitors to Reno Tahoe spent \$2,313 per party per trip in-market. This was highest among Digital Junkies (\$2,820), the Primary Audience (\$2,762), and Eastern U.S. visitors (\$2,722). Lodging/accommodations and restaurants/dining each accounted for 19 percent share of wallet, while 12 percent of travel spend went to shopping, 11 percent to recreation/activities, and nine percent to gambling.

Figure 76: Average Trip Spend Per Party (Recent Visitors)



Question: On your last trip, approximately how much did you spend PER DAY in the Reno Tahoe region on each of the following categories? Base: All past 12-month Reno visitors, 402 respondents.

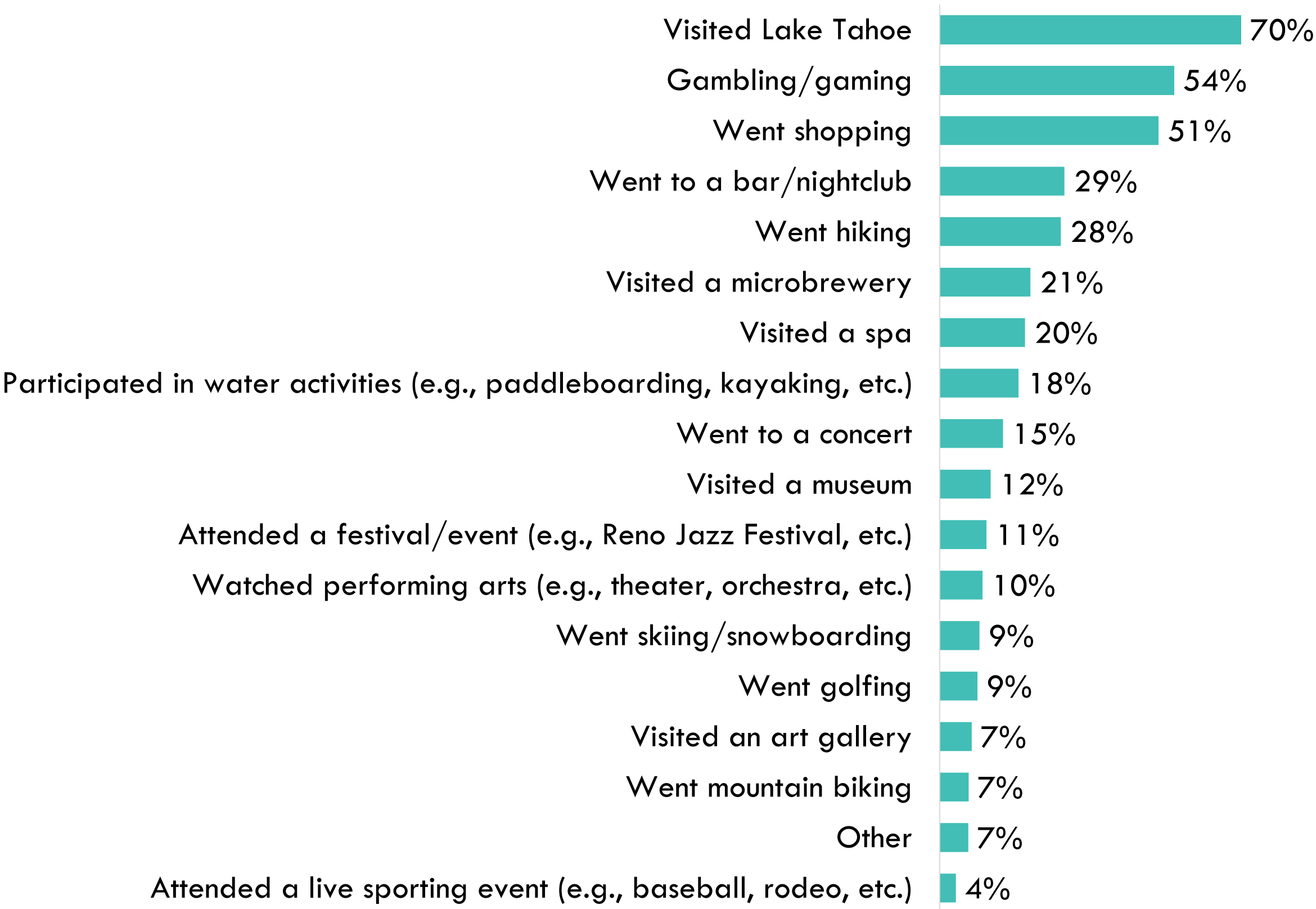
# RENO TAHOE VISITOR ACTIVITIES



Seven in ten past 12-month visitors to Reno Tahoe visited Lake Tahoe (70%), while 54 percent gambled, and 51 percent went shopping. Over one quarter went to a bar/nightclub (29%) and/or went hiking (28%). Around one in five visited a microbrewery (21%), visited a spa (20%), and/or participated in water activities (18%). One in ten attended a festival/event (11%).

Those who visited Reno Tahoe for leisure (75%), Boomers (75%), and Eastern U.S. visitors (75%) were most likely to visit Lake Tahoe on their last trip to Reno. Boomers (68%), Leisure visitors (57%), and Western U.S. visitors (57%) reported the highest gambling rates. Digital Junkies (71%) were the most likely to go shopping.

Figure 77: In-Destination Activities (Recent Visitors)



Question: What type of the following activities did you participate in on your last trip to the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.



# In-Destination Activities by Segment

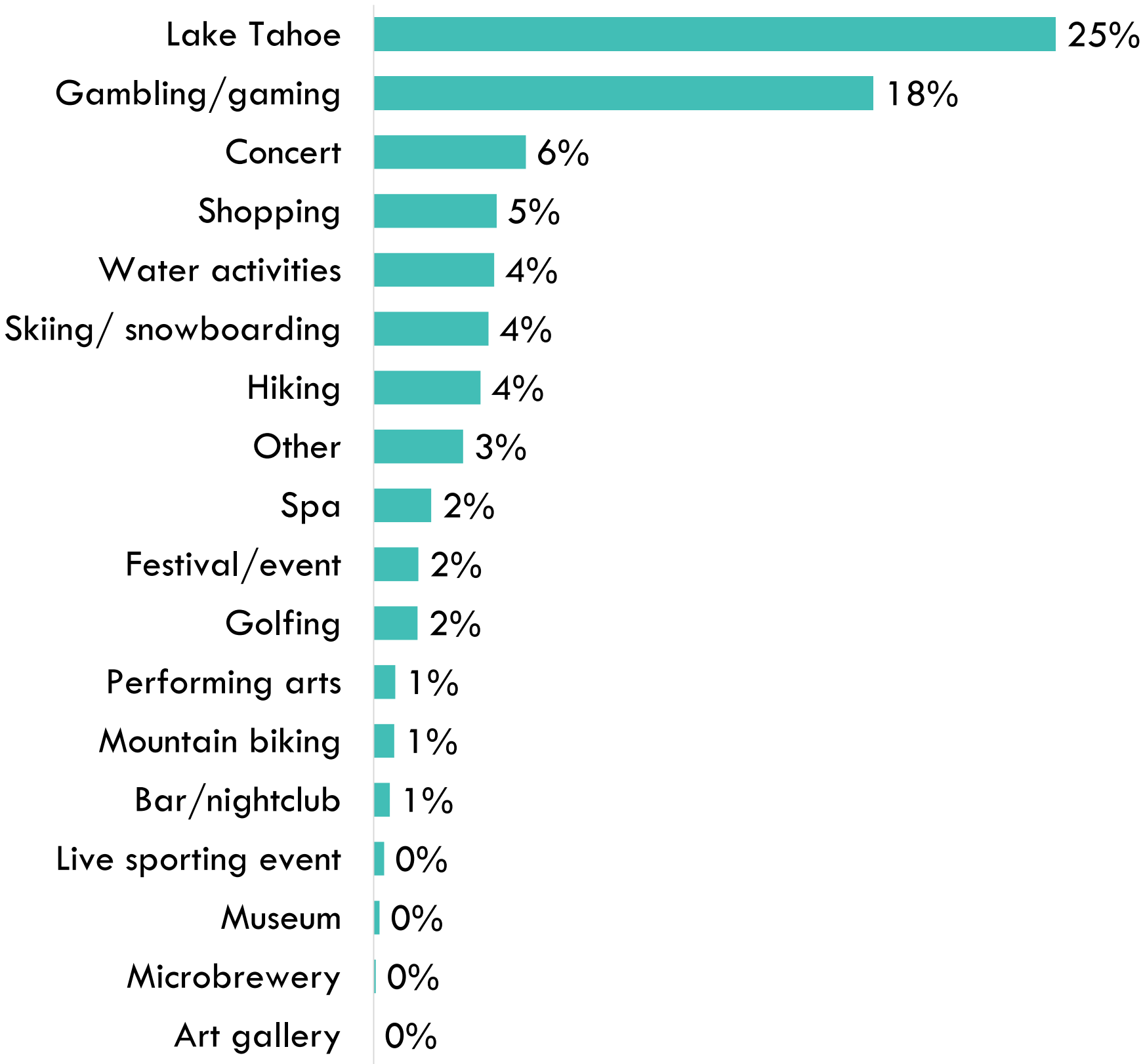
	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Visited Lake Tahoe	68%	71%	73%	65%	73%	67%	75%	70%	61%	74%	75%	59%	75%
Gambling/gaming	48%	54%	47%	49%	55%	50%	57%	44%	44%	45%	68%	57%	53%
Went shopping	61%	72%	54%	63%	64%	58%	52%	61%	55%	44%	49%	44%	54%
Went to a bar/nightclub	30%	39%	20%	17%	34%	13%	26%	29%	34%	19%	29%	22%	32%
Went hiking	31%	30%	37%	21%	35%	25%	28%	42%	34%	35%	22%	31%	26%
Visited a microbrewery	24%	15%	12%	23%	33%	26%	23%	23%	28%	19%	20%	13%	25%
Visited a spa	31%	18%	18%	31%	28%	36%	23%	9%	28%	15%	17%	11%	24%
Participated in water activities (e.g., paddleboarding, kayaking, etc.)	23%	39%	18%	18%	27%	13%	21%	16%	24%	19%	13%	15%	20%
Went to a concert	17%	14%	6%	22%	25%	20%	14%	9%	15%	22%	9%	9%	18%
Visited a museum	20%	21%	23%	11%	19%	8%	10%	20%	15%	8%	12%	10%	13%
Attended a festival/event (e.g., Reno Jazz Festival, etc.)	15%	17%	15%	9%	11%	8%	11%	11%	6%	6%	15%	7%	13%
Watched performing arts (e.g., theater, orchestra, etc.)	13%	22%	11%	3%	15%	13%	11%	1%	12%	7%	8%	5%	13%
Went skiing/snowboarding	15%	18%	13%	9%	11%	11%	12%	2%	16%	2%	10%	6%	11%
Went golfing	15%	25%	12%	13%	18%	17%	11%	1%	16%	2%	7%	6%	10%
Visited an art gallery	15%	23%	11%	14%	15%	9%	6%	9%	13%	6%	4%	4%	9%
Went mountain biking	11%	15%	7%	4%	12%	12%	8%	7%	18%	4%	1%	8%	6%
Other	1%	1%	7%	2%	5%	7%	5%	7%	1%	6%	11%	7%	6%
Attended a live sporting event (e.g., baseball, rodeo, etc.)	5%	13%	1%	1%	6%	2%	3%	3%	8%	1%	3%	3%	4%

# Primary Motivation for Visiting

Among past 12-month visitors that participated in specific activities, 25 percent said that Lake Tahoe was their primary motivation for visiting Reno Tahoe, followed by gambling (18%).

Lake Tahoe as a primary motivator to visit was highest among Millennials (34%) and Leisure visitors (31%). Gambling as a primary motivator was highest among Intellectual Activists (24%), Adrenaline Junkies (24%), and Family Travelers (24%).

Figure 78: Primary Motivation for Visiting (Recent Visitors)



Question: Of the activities you participated in on your last trip, were any your primary motivation for visiting the Reno Tahoe region? Base: Past 12-month Reno visitors, 392 respondents.

# Primary Motivation by Segment

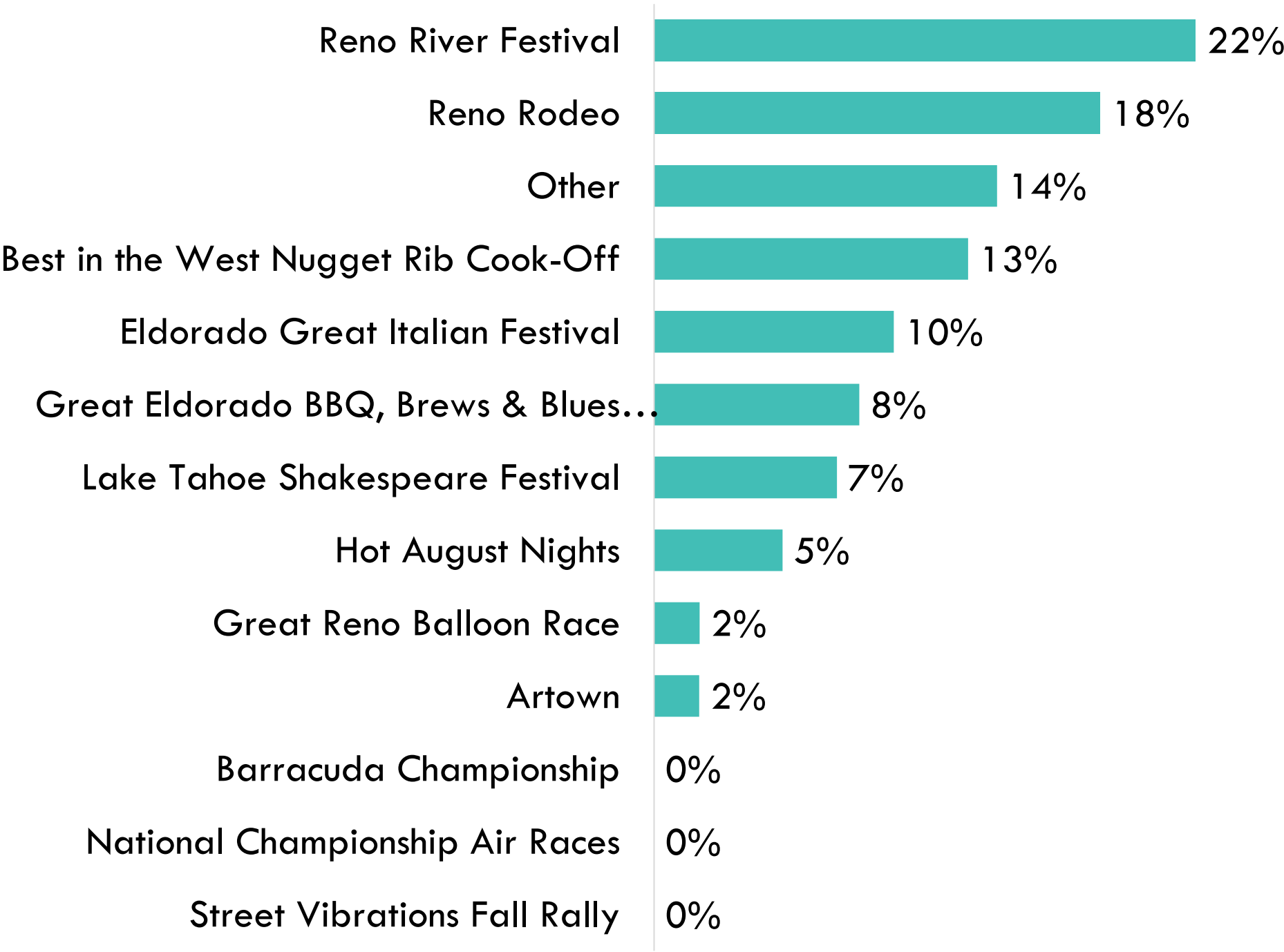
	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Lake Tahoe	25%	27%	25%	23%	24%	23%	31%	18%	34%	26%	23%	28%	24%
Gambling/gaming	23%	23%	24%	13%	24%	24%	23%	10%	18%	18%	21%	23%	16%
Concert	7%	2%	4%	21%	9%	12%	5%	1%	6%	12%	2%	5%	6%
Shopping	5%	9%	2%	8%	2%	6%	6%	4%	5%	5%	3%	3%	5%
Water activities	7%	10%	5%	5%	7%	3%	5%	4%	7%	5%	1%	2%	6%
Skiing/ snowboarding	5%	0%	5%	2%	3%	1%	5%	2%	2%	1%	8%	3%	5%
Hiking	3%	1%	6%	6%	7%	6%	3%	8%	6%	8%	1%	5%	3%
Other	1%	0%	1%	1%	1%	1%	2%	1%	1%	1%	6%	5%	2%
Spa	5%	4%	5%	1%	2%	4%	2%	0%	6%	0%	0%	1%	2%
Festival/event	3%	3%	4%	6%	3%	3%	1%	2%	2%	1%	2%	2%	1%
Golfing	2%	8%	1%	0%	4%	0%	2%	0%	1%	0%	3%	1%	2%
Performing arts	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	1%
Mountain biking	1%	0%	1%	0%	0%	1%	1%	0%	1%	0%	0%	1%	1%
Bar/nightclub	1%	2%	0%	1%	1%	1%	1%	0%	2%	0%	0%	2%	0%
Live sporting event	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	1%	1%	0%
Museum	1%	1%	1%	2%	1%	1%	0%	0%	1%	0%	0%	1%	0%
Microbrewery	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Art gallery	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%



# Festivals/Events Attended

Nearly one quarter of those who visited Reno Tahoe in the past 12 months and attended an event/festival went to the Reno River Festival (22%), followed by the Rodeo (18%), Best in the West Nugget Rib Cook Off (13%), and Eldorado Great Italian Festival (10%).

Figure 79: Festivals/Events Attended (Recent Visitors)



Question: What festival/event did you attend in Reno Tahoe on your last visit? Base: Past 12-month Reno festival/event attendees, 36 respondents.

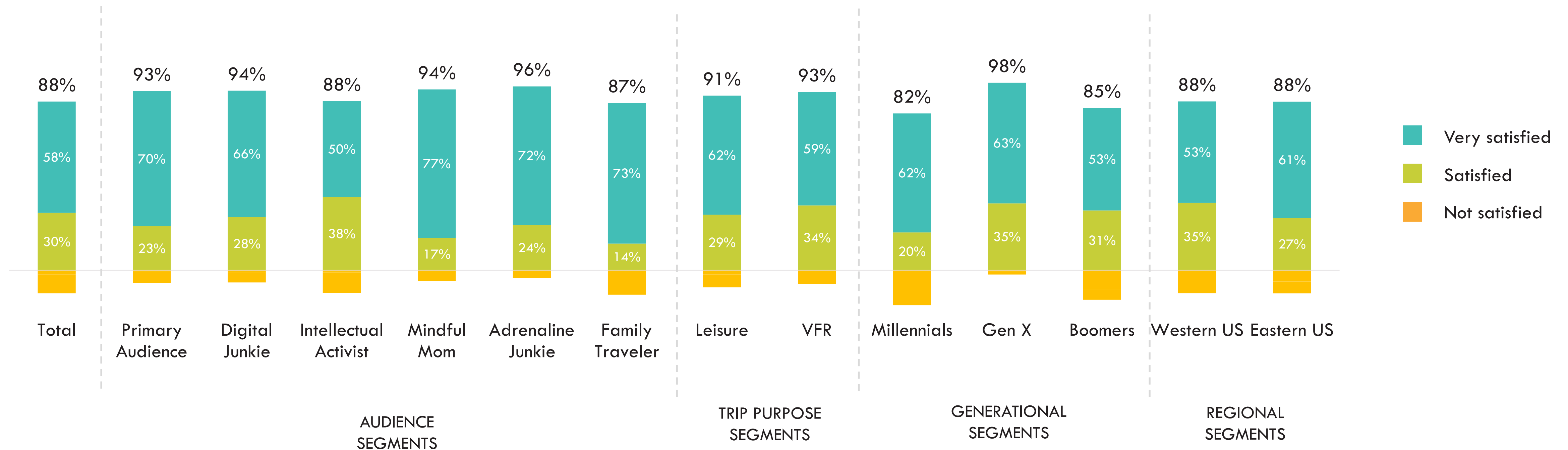
# RENO TAHOE VISITOR EXPERIENCE

A scenic view of a paved bike path in Reno, Tahoe. In the foreground, a cyclist wearing a grey tank top, dark shorts, and a helmet is riding a red bicycle away from the camera. The path is bordered by a wooden fence on the left and a steep, rocky cliff on the right. In the background, there are snow-capped mountains under a blue sky with scattered clouds. The text "RENO TAHOE VISITOR EXPERIENCE" is overlaid in white capital letters across the center of the image.

# Overall Trip Satisfaction

**Nearly all recent visitors to Reno Tahoe were satisfied with their overall trip (88%).** Satisfaction levels were highest among Gen X (98%), Adrenaline Junkies (96%), Mindful Moms (94%), and Digital Junkies (94%). While still high, satisfaction was slightly lower among Millennials (82%).

**Figure 80: Overall Trip Satisfaction (Recent Visitors)**



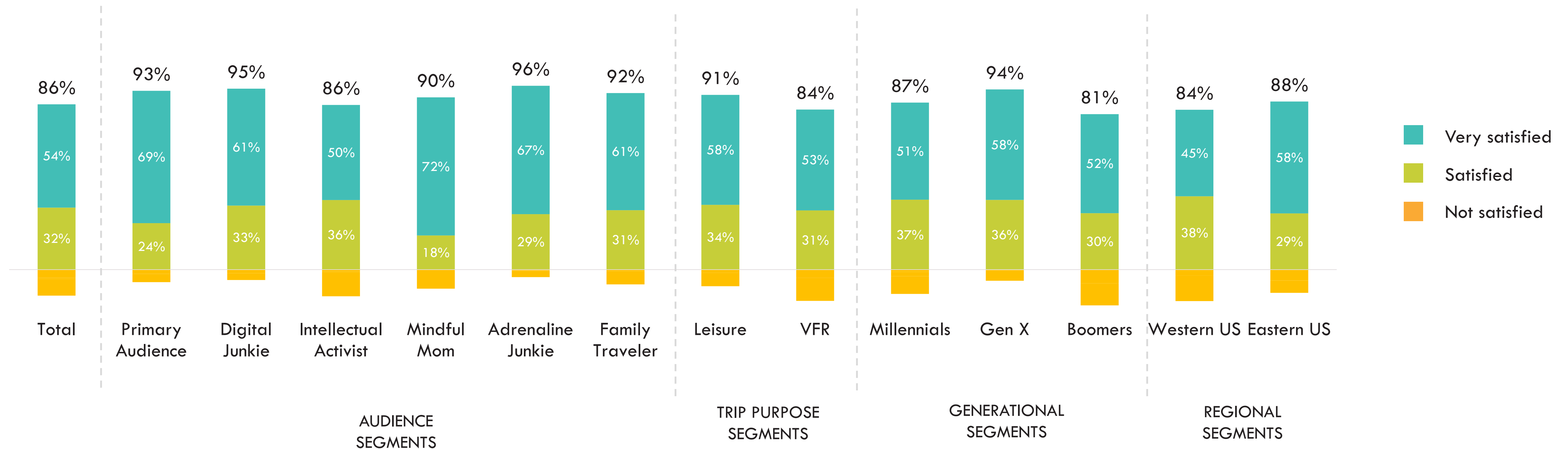
Question: How satisfied are you with your overall visitor experience on your last trip to the Reno Tahoe Region? Base: Past 12-month Reno visitors, 402 respondents.



# Lodging Quality Satisfaction

Nearly all past 12-month visitors were satisfied with the lodging quality on their last trip to Reno Tahoe (86%). Satisfaction levels were highest among Adrenaline Junkies (96%), Digital Junkies (95%), and Gen X (94%). While still high, satisfaction with lodging was slightly lower among Boomers (81%).

Figure 81: Lodging Quality Satisfaction (Recent Visitors)

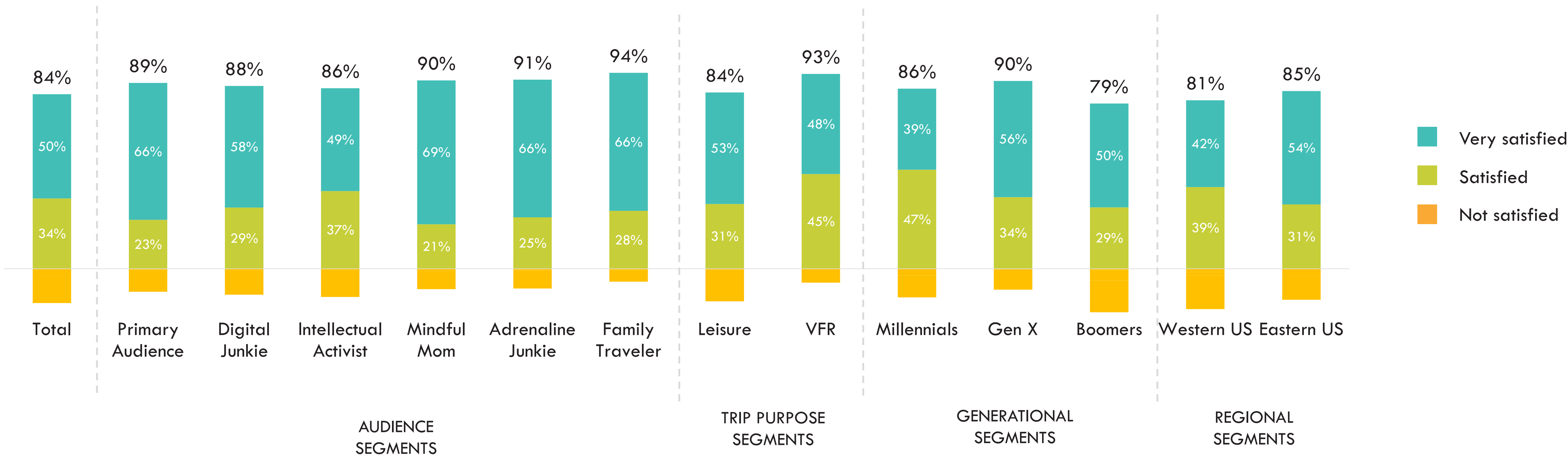


Question: How satisfied are you with the quality of your accommodations on your last trip to the Reno Tahoe Region? Base: Past 12-month Reno visitors, 402 respondents.

# Hospitality and Service Satisfaction

Nearly all past 12-month visitors were satisfied with the hospitality and service on their last trip to Reno Tahoe (84%). Satisfaction levels were highest among Family Travelers (94%) and VFR (93%). Hospitality and service satisfaction was slightly lower among Boomers (79%).

Figure 82: Hospitality & Service Satisfaction (Recent Visitors)

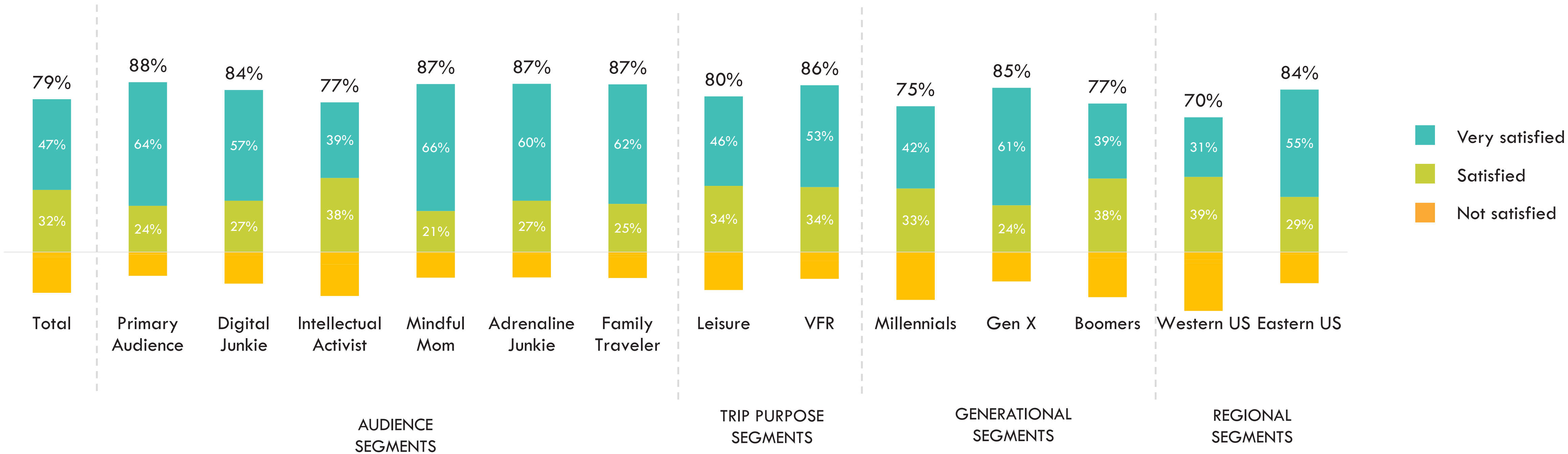


Question: How satisfied are you with the hospitality on your last trip to the Reno Tahoe Region? Base: Past 12-month Reno visitors, 402 respondents.

# Satisfaction with Interactions with Locals

More than three quarters of recent visitors were satisfied with their interactions with Reno Tahoe locals (79%). Satisfaction levels were highest among the Primary Audience (88%) and lower among Western U.S. visitors (70%).

Figure 83: Satisfaction with Interactions with Locals (Recent Visitors)



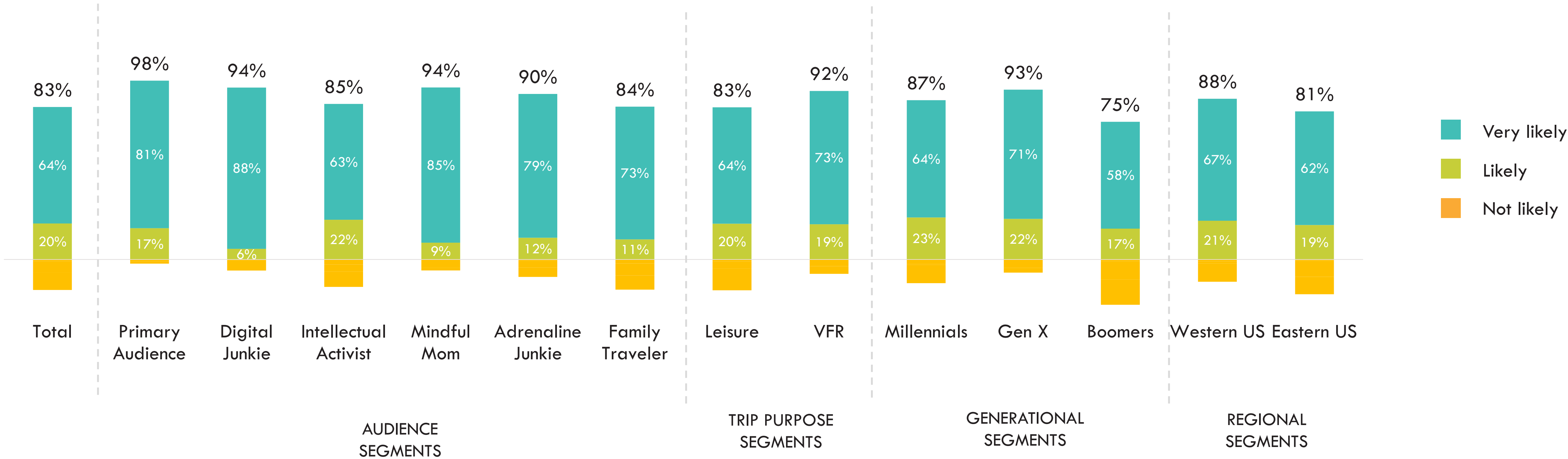
Question: How satisfied are you with the interactions with locals on your last trip to the Reno Tahoe Region? Base: Past 12-month Reno visitors, 402 respondents.



# Likelihood to Return

In line with their high satisfaction ratings, eight in ten recent visitors say they are likely to return to Reno Tahoe in the future (83%). This sentiment was highest among the Primary Audience (98%) and lowest amongst Boomers (75%).

Figure 84: Likelihood to Return (Recent Visitors)

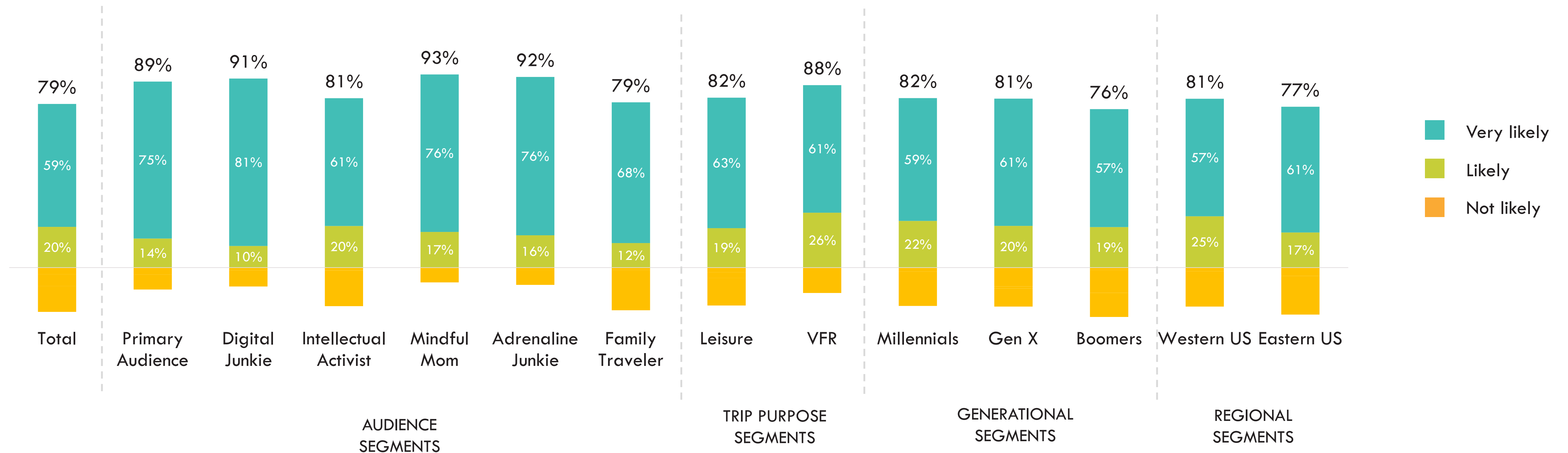


Question: How likely are you to return to the Reno Tahoe region in the future? Base: Past 12-month Reno visitors, 402 respondents.

# Likelihood to Recommend

**Just under eight in ten past 12-month Reno Tahoe visitors say they are likely to recommend the destination to friends and family (79%).** This sentiment was highest among Mindful Moms (93%) and Adrenaline Junkies (92%), and lowest among Boomers (76%).

**Figure 85: Likelihood to Recommend Reno Tahoe to Friends/Family (Recent Visitors)**

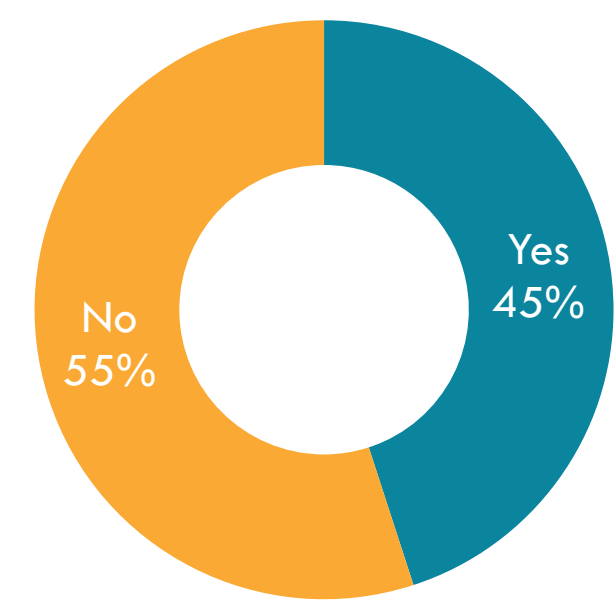


Question: How likely are you to recommend the Reno Tahoe region as a place to visit to friends/family? Base: Past 12-month Reno visitors, 402 respondents.

# Experienced In-Destination Issues

Nearly half of past 12-month visitors to Reno Tahoe experienced some type of in-destination issue (45%). This percentage was highest among Western U.S. visitors (51%) and Digital Junkies (50%).

Figure 86: Experienced In-Destination Issues (Recent Visitors)



	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
Yes	41%	50%	41%	40%	38%	44%	42%	43%	42%	40%	48%	51%	42%
No	59%	50%	59%	60%	62%	56%	58%	57%	58%	60%	52%	49%	58%

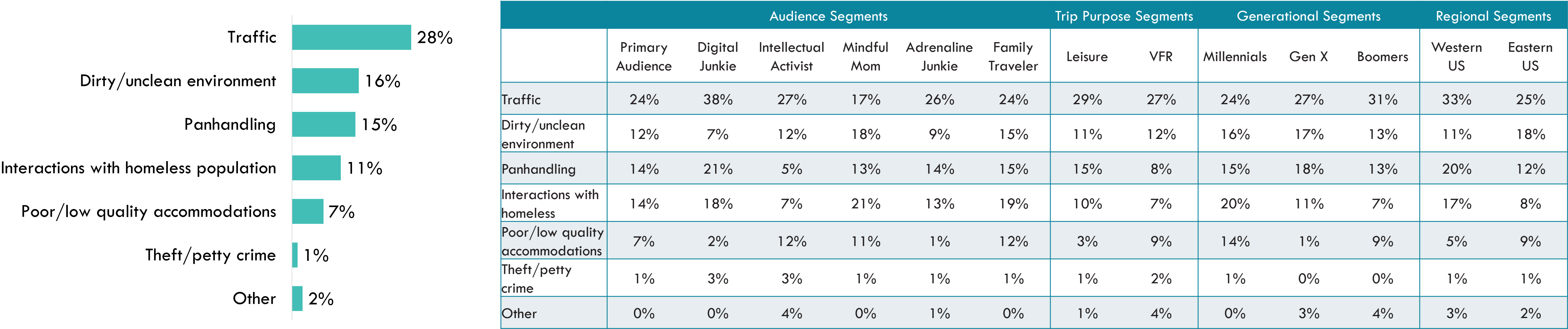
Question: Did you experience any of the following on your most recent trip to the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.



# Specific In-Destination Issues Experienced

The most common negative experience among recent visitors was traffic (28%), followed by dirty/unclean environment (16%) and panhandling (15%). Digital Junkies (38%) and Western U.S. visitors (33%) were most likely to experience traffic issues, while Mindful Moms (18%) and Eastern U.S. visitors (18%) were most concerned about the unclean environment.

Figure 87: Specific In-Destination Issues Experienced (Recent Visitors)



Question: Did you experience any of the following on your most recent trip to the Reno Tahoe region? Base: Past 12-month Reno visitors, 402 respondents.



# DEMOGRAPHICS

A full-page photograph of two runners in a forest. A woman in a red jacket and black leggings is running towards the camera in the foreground. A man in a dark jacket and shorts is running behind her to the right. The forest is filled with tall, thin trees, and the sun is shining brightly through the canopy, creating a lens flare effect. The ground is a dirt path with some rocks.



# Demographics

RECENT VISITORS

	Total	Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Past 12 Month Visitors	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
n=	402	149	67	91	67	124	92	267	70	104	108	175	318	84
Gender														
Female	46%	48%	51%	59%	100%	41%	55%	42%	59%	54%	41%	44%	48%	44%
Male	54%	52%	49%	41%	0%	59%	45%	58%	41%	46%	59%	56%	52%	56%
Non-binary	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Age														
Boomers	44%	37%	24%	43%	7%	30%	12%	42%	47%	0%	0%	100%	45%	44%
Gen X	30%	24%	23%	19%	33%	32%	36%	31%	26%	0%	100%	0%	25%	32%
Millennials	21%	32%	36%	35%	54%	30%	49%	22%	23%	100%	0%	0%	27%	18%
Gen Z	5%	7%	16%	3%	5%	8%	3%	5%	4%	0%	0%	0%	3%	6%
Mean	53.2	49.1	43.8	51.7	41.1	47.6	43.6	53.0	53.4	34.9	50.1	67.5	52.9	53.4
Marital Status														
Married or partnered	68%	74%	56%	76%	89%	69%	92%	70%	68%	67%	74%	70%	67%	68%
Single	21%	21%	39%	19%	6%	27%	5%	24%	15%	27%	22%	11%	21%	21%
Divorced or widowed	11%	5%	5%	5%	5%	4%	3%	6%	17%	5%	4%	19%	11%	10%
Children in Household														
Under 18	24%	38%	32%	34%	100%	37%	100%	31%	7%	54%	27%	9%	30%	21%
Household Income														
\$200,000+	6%	4%	3%	9%	6%	7%	4%	7%	4%	3%	10%	5%	8%	4%
\$150,000-\$199,999	13%	13%	8%	4%	14%	12%	13%	12%	13%	16%	14%	12%	8%	15%
\$100,000-\$149,999	20%	24%	20%	38%	20%	17%	25%	25%	8%	22%	15%	21%	23%	19%
\$50,000-\$99,999	40%	47%	52%	39%	45%	49%	48%	37%	50%	50%	36%	41%	42%	39%
\$0-\$49,999	21%	13%	16%	10%	15%	15%	10%	19%	24%	10%	25%	21%	19%	22%
Mean	\$94,337	\$98,284	\$89,402	\$103,709	\$99,553	\$97,307	\$100,796	\$98,147	\$84,922	\$100,003	\$96,235	\$92,951	\$95,295	\$93,825



# Demographics

RECENT VISITORS

Total		Audience Segments						Trip Purpose Segments		Generational Segments			Regional Segments	
	Past 12 Month Visitors	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Leisure	VFR	Millennials	Gen X	Boomers	Western US	Eastern US
n=	402	149	67	91	67	124	92	267	70	104	108	175	318	84
Race														
White/ Caucasian	86%	83%	76%	78%	84%	78%	77%	84%	87%	81%	82%	94%	80%	89%
Asian, Native Hawaiian, or Pacific Islander	6%	8%	6%	10%	10%	8%	8%	6%	7%	13%	5%	3%	12%	3%
African American/ Black	4%	5%	10%	8%	1%	5%	1%	4%	2%	3%	4%	0%	3%	4%
Native American, Aleut, or Native Alaskan	2%	2%	3%	3%	4%	2%	5%	2%	3%	3%	0%	2%	2%	1%
Other	3%	2%	5%	1%	1%	6%	9%	4%	1%	1%	8%	1%	3%	3%
Ethnicity														
Hispanic/ Latino	9%	9%	15%	10%	11%	11%	16%	8%	7%	15%	9%	5%	12%	7%
Employment														
Full time	50%	57%	53%	64%	55%	62%	73%	51%	39%	71%	72%	30%	52%	50%
Part time	11%	15%	13%	9%	19%	17%	12%	12%	12%	13%	9%	7%	11%	10%
Unemployed	6%	8%	10%	4%	20%	6%	11%	7%	3%	14%	9%	1%	8%	5%
Student	2%	2%	9%	0%	4%	4%	2%	1%	2%	2%	0%	0%	2%	2%
Retired	31%	18%	15%	23%	2%	12%	1%	28%	44%	0%	9%	62%	26%	33%
Political Status														
Strongly left	12%	17%	12%	24%	22%	13%	12%	10%	26%	10%	18%	8%	8%	15%
Leaning left	15%	14%	12%	22%	7%	7%	6%	17%	17%	10%	6%	24%	20%	12%
Centrist	35%	31%	41%	26%	30%	34%	36%	39%	8%	36%	41%	32%	36%	35%
Leaning right	22%	20%	22%	13%	31%	29%	28%	19%	38%	31%	27%	16%	18%	25%
Strongly right	12%	15%	6%	12%	6%	13%	14%	12%	11%	10%	5%	19%	11%	12%
Apolitical	3%	3%	6%	2%	4%	3%	4%	3%	0%	3%	4%	1%	6%	1%
Orientation														
LGBTQ+	7%	11%	7%	6%	14%	8%	9%	4%	11%	10%	1%	8%	4%	8%
Accessibility														
Requires special assistance	4%	3%	1%	0%	14%	0%	8%	2%	4%	7%	5%	3%	6%	4%
Physical (e.g., wheelchair)	3%	1%	1%	0%	7%	0%	4%	1%	2%	3%	5%	3%	5%	2%
Hearing impairment	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Cognitive (e.g., autism)	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	1%	0%
Visual impairment	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%

# Demographics

POTENTIAL VISITORS

	Total	Audience Segments						Generational Segments				Reno Travel Segments		
	Not Past 12 Month Visitors	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gen Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
n=	800	198	98	189	91	134	125	29	173	173	425	295	505	137
Gender														
Female	54%	51%	57%	52%	100%	46%	53%	48%	54%	54%	54%	46%	56%	47%
Male	46%	49%	43%	48%	0%	54%	47%	38%	46%	46%	46%	54%	43%	52%
Non-binary	1%	0%	0%	0%	0%	0%	0%	14%	0%	0%	0%	0%	1%	1%
Age														
Boomers	49%	29%	18%	41%	5%	23%	11%	0%	0%	0%	100%	60%	45%	39%
Gen X	23%	23%	18%	19%	39%	22%	38%	0%	0%	100%	0%	20%	23%	24%
Millennials	25%	45%	53%	38%	55%	51%	50%	0%	100%	0%	0%	18%	27%	35%
Gen Z	4%	3%	11%	2%	2%	5%	1%	100%	0%	0%	0%	2%	4%	1%
Mean	54.0	46.8	40.2	51.6	42.0	44.7	44.2	22.7	34.7	49.7	68.5	59.1	52.5	50.4
Marital Status														
Married or partnered	59%	58%	43%	62%	73%	64%	83%	27%	52%	64%	63%	66%	57%	63%
Single	24%	30%	49%	24%	14%	27%	11%	73%	43%	24%	11%	17%	26%	24%
Divorced or widowed	16%	13%	8%	14%	12%	9%	7%	0%	4%	12%	26%	16%	16%	12%
Children in Household														
Under 18	23%	35%	33%	29%	100%	43%	100%	6%	45%	37%	5%	19%	24%	37%
Household Income														
\$200,000+	5%	3%	7%	3%	2%	3%	2%	14%	6%	4%	3%	4%	5%	3%
\$150,000-\$199,999	5%	4%	3%	8%	11%	7%	8%	1%	6%	6%	5%	7%	5%	7%
\$100,000-\$149,999	16%	17%	6%	17%	17%	19%	30%	13%	14%	19%	15%	21%	14%	26%
\$50,000-\$99,999	40%	43%	54%	51%	48%	36%	47%	29%	43%	34%	42%	36%	41%	34%
\$0-\$49,999	35%	32%	29%	21%	22%	35%	13%	44%	31%	37%	35%	32%	35%	30%
Mean	\$76,726	\$76,038	\$75,379	\$84,352	\$86,173	\$77,440	\$93,899	\$77,433	\$80,325	\$77,477	\$74,471	\$81,477	\$75,290	\$84,594

# Demographics

POTENTIAL VISITORS

	Total	Audience Segments						Generational Segments				Reno Travel Segments		
	Not Past 12 Month Visitors	Primary Audience	Digital Junkie	Intellectual Activist	Mindful Mom	Adrenaline Junkie	Family Traveler	Gen Z	Millennials	Gen X	Boomers	Lapsed Visitor	Never Visited	Interested Next Year
n=	800	198	98	189	91	134	125	29	173	173	425	295	505	137
Race														
White/ Caucasian	83%	77%	76%	74%	77%	82%	80%	64%	72%	79%	92%	79%	85%	82%
Asian, Native Hawaiian, or Pacific Islander	8%	10%	14%	15%	4%	10%	8%	29%	10%	8%	5%	9%	7%	7%
African American/ Black	6%	7%	7%	8%	13%	5%	9%	7%	14%	7%	1%	8%	5%	6%
Native American, Aleut, or Native Alaskan	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%
Other	3%	6%	3%	2%	6%	3%	3%	0%	4%	6%	1%	4%	2%	5%
Ethnicity														
Hispanic/ Latino	8%	13%	19%	8%	13%	15%	8%	7%	13%	12%	4%	7%	8%	13%
Employment														
Full time	39%	63%	59%	60%	57%	61%	69%	22%	69%	58%	17%	30%	42%	61%
Part time	12%	8%	10%	7%	16%	11%	11%	18%	13%	11%	11%	12%	12%	7%
Unemployed	11%	9%	8%	5%	17%	10%	9%	21%	15%	20%	4%	5%	13%	7%
Student	2%	1%	11%	0%	0%	3%	0%	39%	3%	0%	0%	2%	2%	1%
Retired	36%	19%	12%	28%	9%	15%	11%	0%	1%	11%	68%	51%	32%	24%
Political Status														
Strongly left	13%	15%	9%	17%	13%	7%	8%	26%	14%	10%	12%	11%	13%	6%
Leaning left	18%	16%	27%	20%	15%	12%	12%	14%	21%	16%	19%	18%	19%	20%
Centrist	31%	30%	33%	31%	44%	44%	45%	52%	35%	36%	26%	31%	31%	25%
Leaning right	15%	14%	15%	16%	13%	16%	16%	3%	12%	12%	18%	19%	14%	18%
Strongly right	20%	18%	10%	12%	10%	17%	16%	0%	11%	20%	25%	20%	20%	23%
Apolitical	3%	7%	6%	5%	4%	3%	3%	5%	6%	6%	1%	2%	4%	8%
Orientation														
LGBTQ+	8%	11%	16%	12%	6%	5%	4%	36%	11%	4%	6%	6%	8%	10%
Accessibility														
Requires special assistance	8%	8%	12%	10%	5%	5%	3%	18%	8%	7%	8%	7%	9%	6%
Physical (e.g., wheelchair)	4%	2%	3%	2%	0%	4%	0%	1%	1%	4%	7%	3%	5%	5%
Hearing impairment	1%	0%	0%	2%	0%	1%	0%	12%	0%	1%	1%	1%	1%	2%
Cognitive (e.g., autism)	1%	3%	2%	3%	5%	0%	3%	0%	3%	2%	0%	3%	1%	1%
Visual impairment	1%	0%	0%	1%	0%	0%	0%	12%	0%	1%	0%	0%	1%	1%
Other	2%	3%	7%	3%	0%	1%	0%	4%	5%	2%	0%	1%	3%	1%