

Future Partners



Visit Reno Tahoe

Resident Sentiment

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Research Overview & Objectives

Research Overview & Objectives

This report presents the findings of a longitudinal study of Washoe County residents conducted by Future Partners on behalf of the Reno Sparks Convention and Visitors Authority. The primary objective of this research is to understand Washoe County residents' perceptions of tourism and the impact on their quality of life. The study measures :

- Perceptions of tourism among Washoe County residents
- Perceptions of the economic, jobs, community and personal impact of tourism
- Quality of life as a result of tourism

The study was fielded monthly between July – December 2023 to adults age 18+ who live in Washoe County. A total of 476 respondents were collected via a sample panel provider and owned audience email collection. Results were weighted to county demographics.



Topline Findings

A young girl with blonde hair, wearing a brown jacket, is sitting on the hood of a dark-colored car. She is looking out over a vast, hazy landscape under a warm, golden sunset sky. The text is overlaid on the image in a large, white, sans-serif font.

Washoe County residents are both happy and proud to live in Nevada, while being optimistic about the future.

Most residents say tourism is important to the future of Washoe County; however, there is room to improve impact at the local level.

Residents who work in tourism are much more positive about the quality of life Washoe County offers, as well as their outlook for the future.

Key Insights

1. Washoe County residents are happy.

Seven in ten Washoe County residents (70%) are happy to live in Nevada, while six in ten (63%) say they expect their personal quality of life to increase in the year ahead.

2. Positive perceptions of Washoe County are driven by outdoors and trail access.

Easy access to the outdoors, coupled with plentiful sidewalks, bike lanes, and foot trails, are Washoe County’s best assets. Consequently, nearly three quarters of residents say they can always find something to do in their free time (74%). Other positive quality-of-life assets include plentiful access to healthcare and being business-friendly.

3. Concerns about cost of living, housing access, and climate risk should be monitored.

Six in ten residents say Washoe County is at risk for climate-related issues, such as wildfires (59%). A very small percentage of residents also believe there is a variety of housing stock available for all income levels (23%) and that the cost of living is affordable (22%). These concerns should be monitored, as they play a critical role in the quality-of-life satisfaction for residents.

4. Washoe County residents recognize the importance of the local tourism industry.

Seven in ten residents agree that tourism is very important to Washoe County’s economy (68%). Other perceived benefits include the support of local festivals, arts and cultural experiences, and sporting events (70%), as well as new dining, entertainment, and shopping amenities (60%). Half of residents also recognize that increased visitor spending results in more funding for community services (52%).

Despite these benefits, less than half of locals say that tourism results in a better quality of life for them and their families (47%). As such, there is opportunity to better communicate the direct and indirect positive impacts of tourism on the local community to increase overall sentiment and engagement.

5. Tourism employees have less positive perceptions about the broader impact of tourism but are generally happier overall.

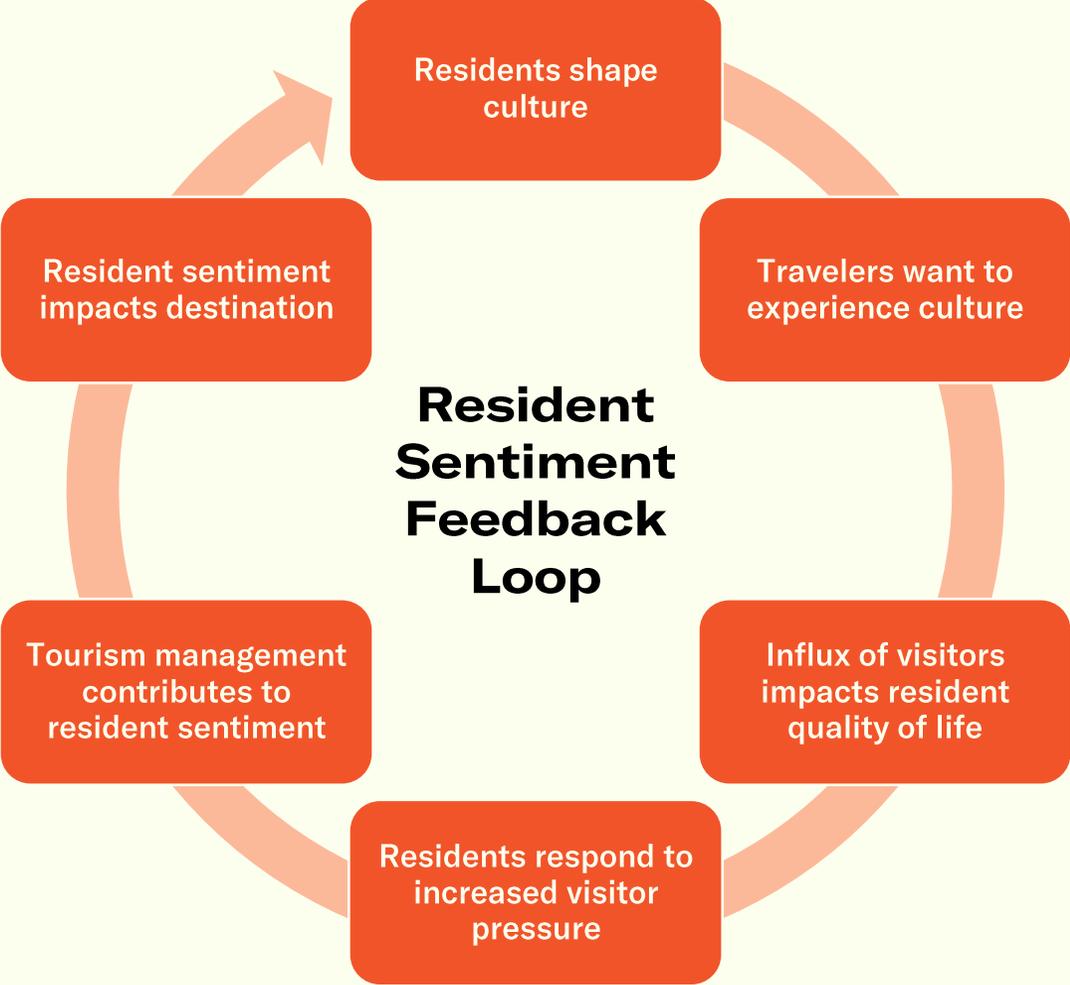
Just over one in ten Washoe County residents either work for – or own – a business that supports the tourism industry (15%). Tourism workers’ personal quality of life is improving, and they are optimistic for the future. Interestingly, tourism workers have more negative about the economic and community impacts of tourism on Washoe County compared to residents in general.

Why Quality of Life Matters

Resident sentiment about the tourism industry does not exist in a vacuum. Often times external factors that are impacted by tourism have a significantly greater influence on how residents perceive the tourism industry.

It is important to understand the influence of these factors on residents' tourism sentiment. Residents deeply influence the culture of a destination, which drives the desire to visit by travelers. There exists a feedback loop, where an increase in visitors who want to experience said culture may end up creating pressure for locals, subsequently driving concerns about housing access, cost of living, traffic, crowding, and more. If not properly managed, this sentiment may cause long term impacts, and ultimately change the culture that made the destination what it is.

As a result, it is critical to monitor tourism sentiment as it relates to quality-of-life measures. Destinations have the opportunity to guide the impacts of tourism on communities, while taking into account residents' perspectives and preserving what makes the destination unique.



Washoe County Residents Takeaways

Washoe County Residents

Life in Washoe County.

**11%
LGBTQ+**

**15%
accessibility
needs in
household**

**23%
BIPOC**

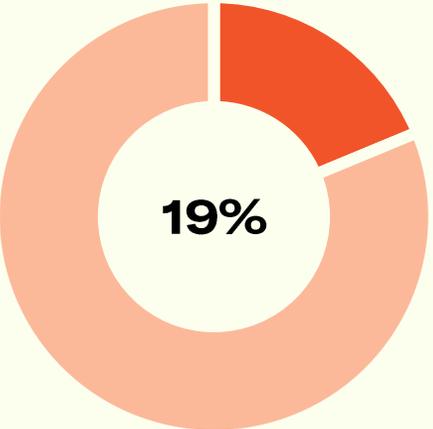
**29%
have
children**

**59%
employed**

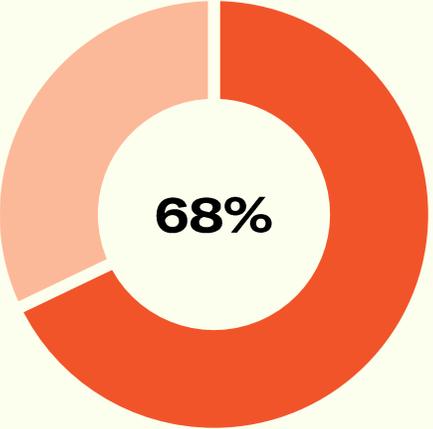
**\$72,500
average
household
income**

**47 years
old on
average**

Washoe Residents *At a Glance*



Born in Washoe County

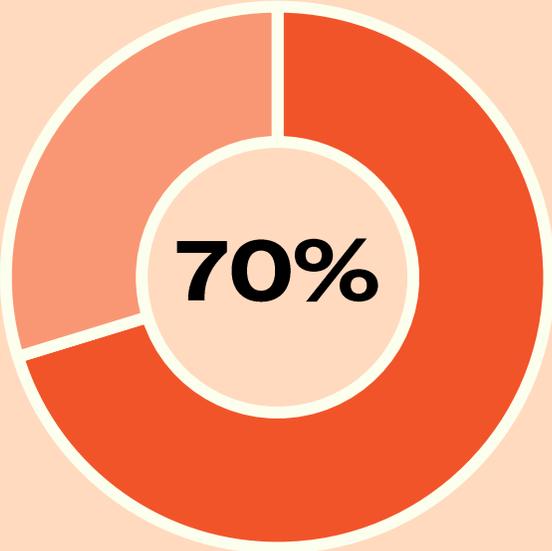


Long-term resident (six or more years)

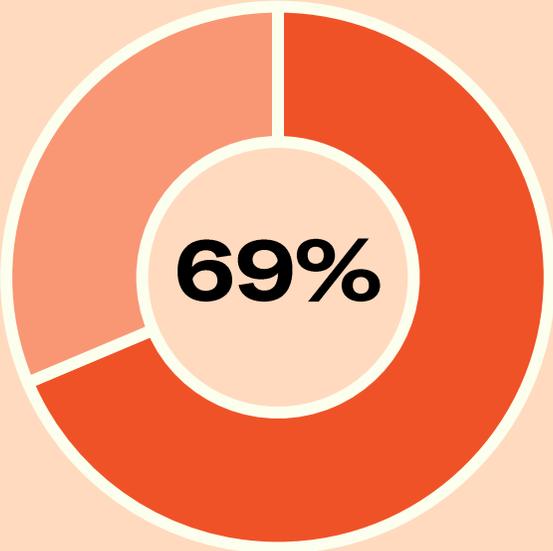
Quality of Life	Washoe County residents are positive about their current quality of life and optimistic for the future. Concerns about cost of living and housing are top of mind for residents.
Washoe Assets	Outdoor recreation and access to trails tops of the list of Washoe County's assets according to residents. Other key benefits include festivals and events, as well as restaurants and dining.
Tourism Sentiment	Most residents recognize the importance of tourism for Washoe County, both from an economic and community development perspective. They are less positive about the impact on local jobs.
Employment	One third of residents are currently employed or have been employed in businesses serving visitors. Four in ten employees are highly satisfied working in the industry.

Washoe residents are generally happy and proud to live in Nevada

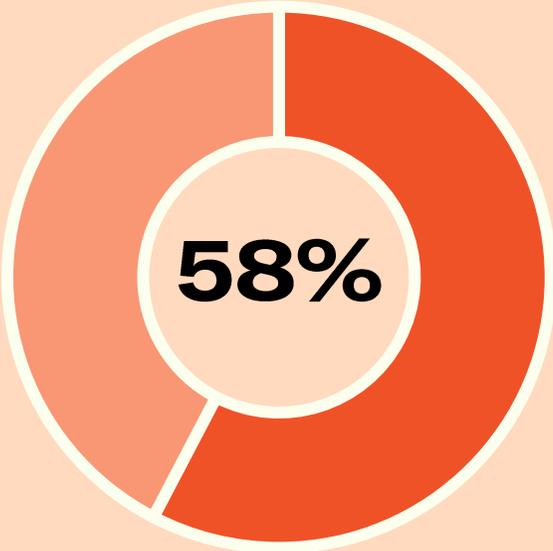
Happy to Live in Nevada



Proud to Live in Nevada



Feel Personal Responsibility to Represent Nevada Well



Washoe residents express a positive outlook on their quality of life and experience of their natural environment but have concerns about the perceived increase in cost of living



Quality of Life is Improving

Nearly half of residents (45%) say their quality of life has improved compared to one year ago, outpacing those who said it has declined as well as those who said it remained the same. For the small percentage who said their quality of life decreased, key factors included cost of living increases and health concerns.



Access to the Outdoors and Trails are Washoe's Strongest Assets

Nearly all residents agree that Washoe County offers great outdoor access (89%). A smaller but sizable percentage also say the county has plentiful sidewalks, bike lanes, and foot trails (68%).



Climate Risk, Safety, Cost, and Housing are Major Concerns

Six in ten residents say Washoe County is at risk of climate-related disasters like wildfires (59%). Other areas of concern include safety: only four in ten say Washoe County is safe (44%), while less than one quarter say there's a variety of housing available for different income levels (23%). In fact, most (57%) of the County's residents disagree that the cost of living is affordable.

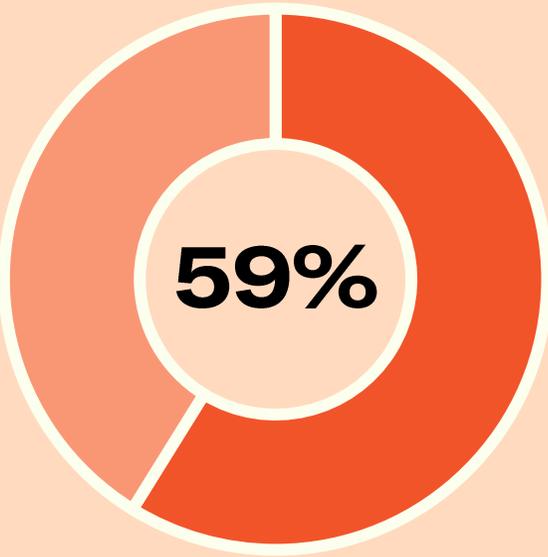


Residents are Optimistic about their Future

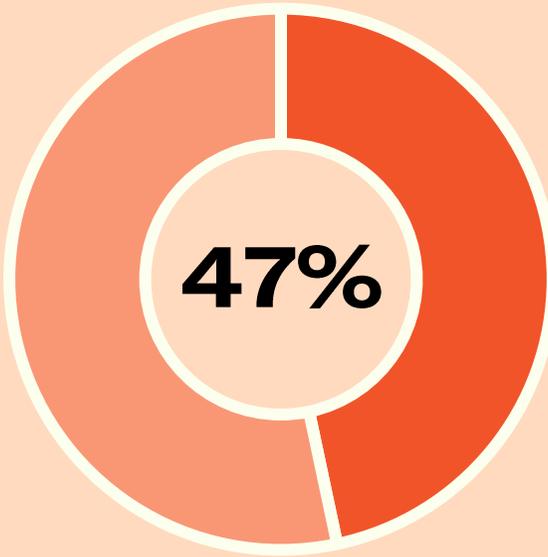
More than six in ten Washoe County residents say they expect their personal quality of life to improve in the next year (63%), showing a high level of optimism for the future. They also perceive high economic potential: 53% agree that the county is business-friendly.

Most Washoe residents have a positive overall perception of tourism in the county and believe it is important to the county's future

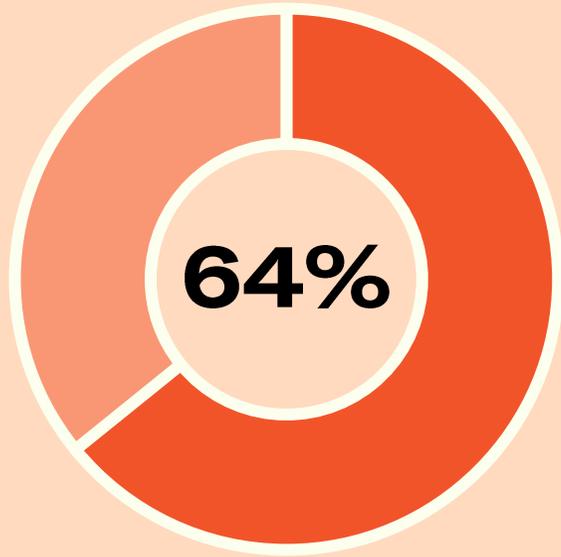
Positive Perception of Washoe County Tourism



Tourism Results in a Better Quality of Life for Me



Tourism is Important to Washoe County's Future



Residents believe that tourism benefits their communities economically and enables aspects of local culture to thrive

Economic Impact



Residents recognize the importance of tourism in Nevada & Washoe County but are more skeptical about impact on individuals' financial lives.

More than three-quarters of residents agree that tourism is very important to Nevada's economy (76%), while a slightly smaller but still sizeable percentage agree tourism is important to Washoe County's economy (68%).

A much smaller proportion of residents say that tourism has a direct impact on their economic situation – only 38 percent agree it reduces their taxes, while 46 percent disagree that it decreases their cost of living.

Jobs Impact



There is room to improve perceptions of availability and financial appeal of jobs in Washoe County's tourism industry.

Fewer than four in ten residents agree that Washoe County has ample jobs available in the tourism industry (38%). A similar percentage also say it is easy to get a job in tourism year-round (36%). Residents are more likely to disagree (36%) than agree (22%) that tourism jobs pay well.

Community Impact



Residents are aware that tourism helps establish and support amenities and services in their community.

Seven in ten residents agree that tourism supports festivals, arts and cultural experience, and sporting events in the local area (70%), while 60 percent say it creates new dining, entertainment, and shopping amenities. Around of half of residents believe that tourism results in more funding for community services (52%) as well as environmental improvement projects (45%).

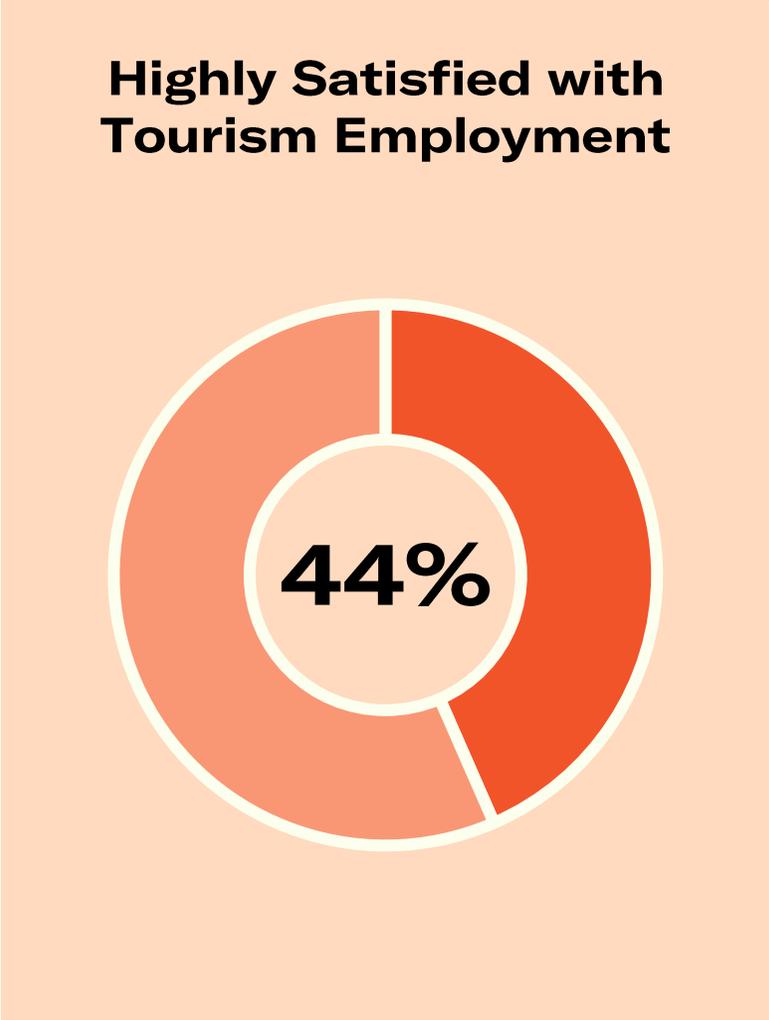
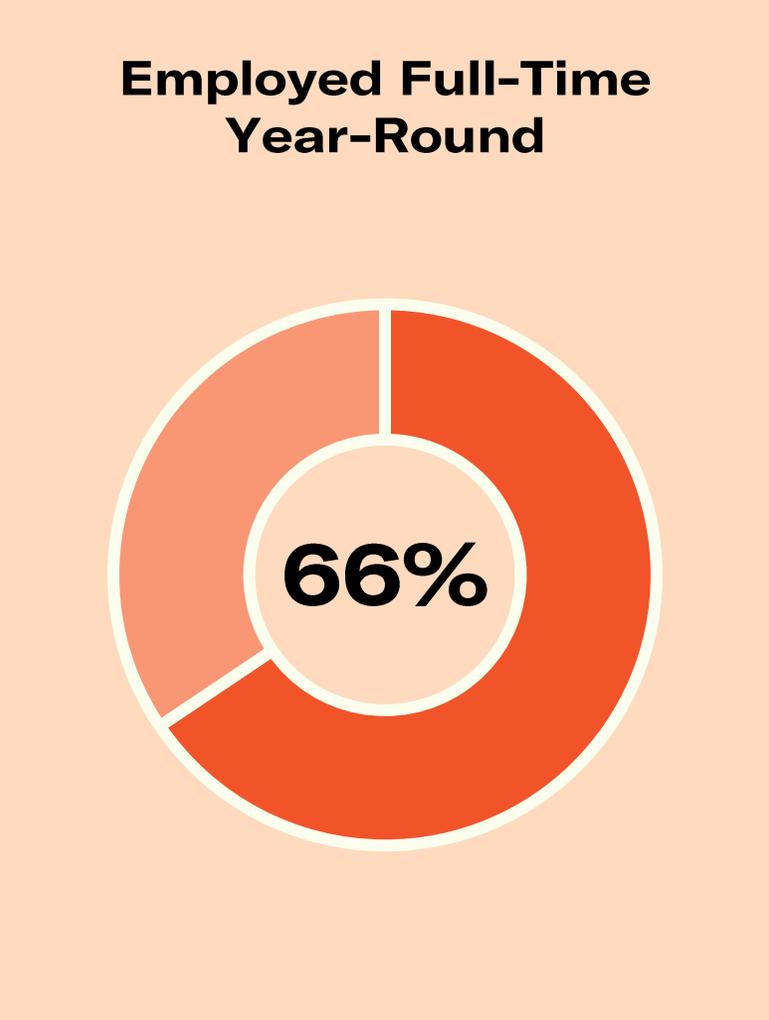
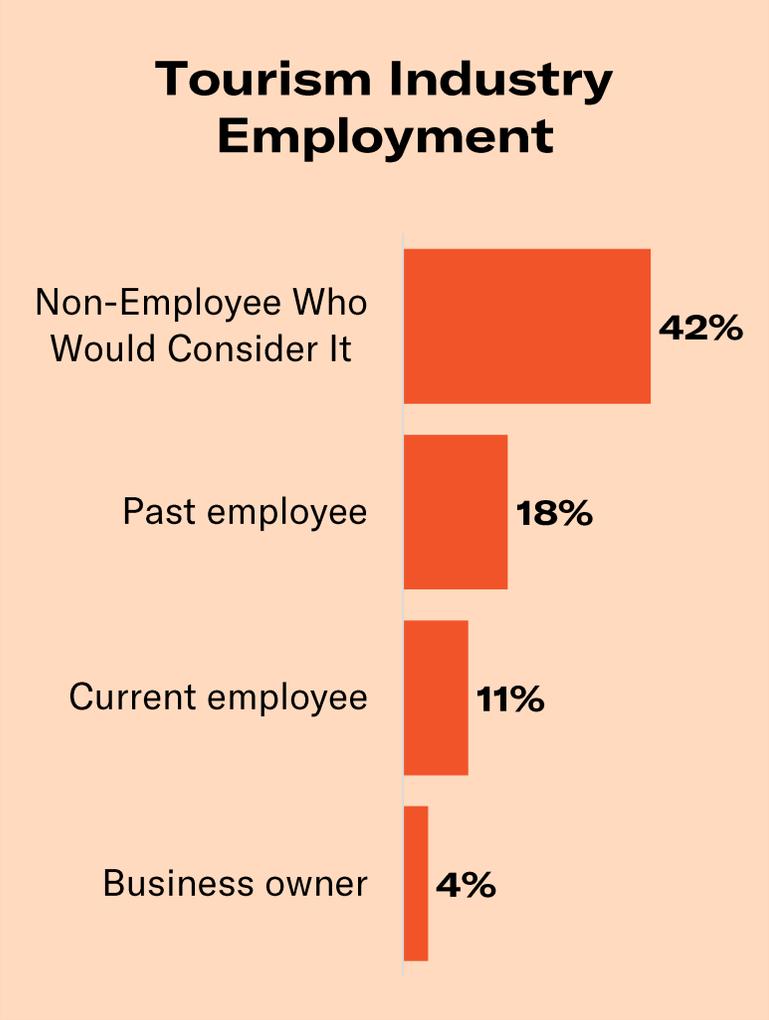
Personal Impact



On a personal level, the biggest strife for Washoe County residents is the perceived traffic and crowding caused by visitors.

For two thirds of residents, the traffic caused by visitors is a concern (64%), Fortunately, however, only a small portion of residents blame tourists for key issues, such as littering (35%) and safety concerns (28%). Many residents (43%) frequently visit tourism businesses themselves.

3 in 10 Washoe residents have some vocational connection to tourism, mostly as past employees; less than 1 in 20 surveyed owned businesses related to tourism



Tourism Workers

Owens a business or is employed by a business that supports Washoe County's tourism industry.

**13%
LGBTQ+**

**18%
accessibility
needs in
household**

**30%
BIPOC**

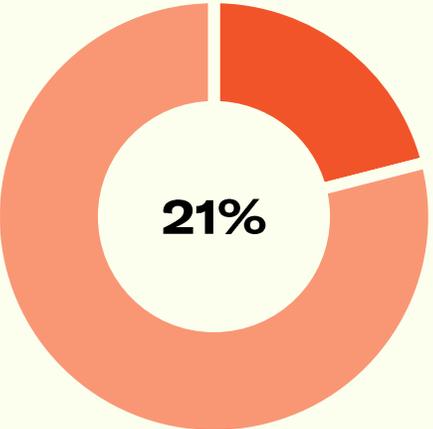
**46%
have
children**

**100%
employed**

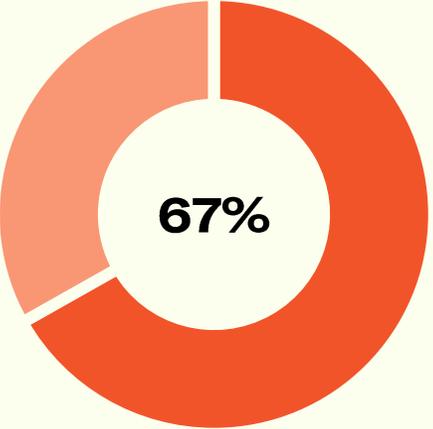
**\$71,000
average
household
income**

**42 years
old on
average**

Washoe Tourism Workers *At a Glance*



Born in Washoe County

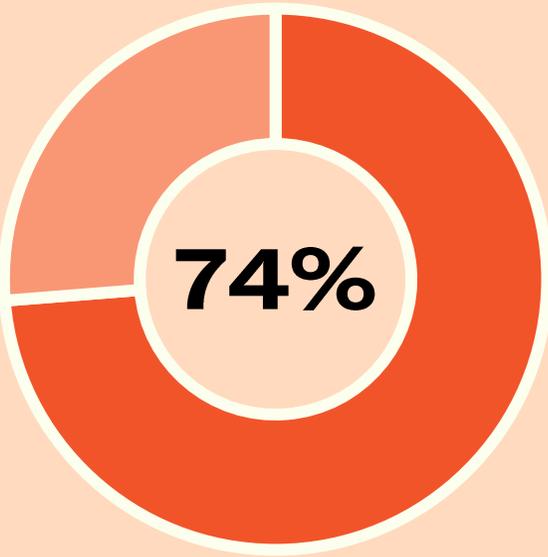


Long term resident (six or more years)

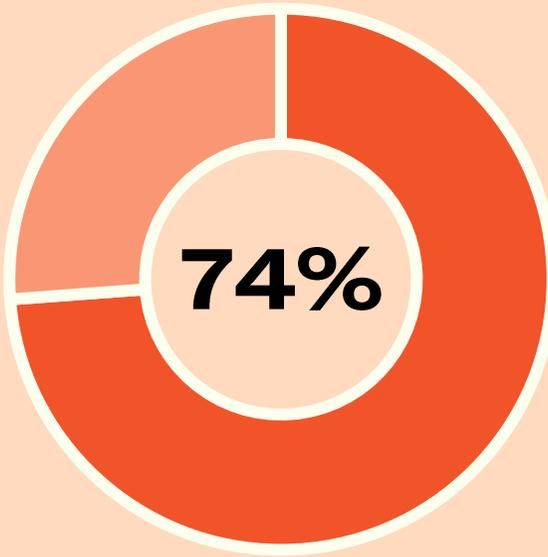
Quality of Life	Tourism workers are very positive about both their current and future quality of life. While climate crises, cost of living, and housing are key concerns, they are less pessimistic than non-industry workers.
Washoe Assets	Outdoor recreation and access to trails tops of the list of Washoe County's assets according to tourism workers. Other key benefits include being business-friendly and having ample jobs available.
Tourism Sentiment	While tourism workers recognize the importance of tourism for the future of Washoe County, they are less positive about the impact from an economic and community perspective. This is balanced by a more positive perspective of tourism's impact on jobs.

Most Washoe tourism workers are happy and proud to live in Nevada, but interestingly are less likely than other residents to feel responsible for representing the state well*

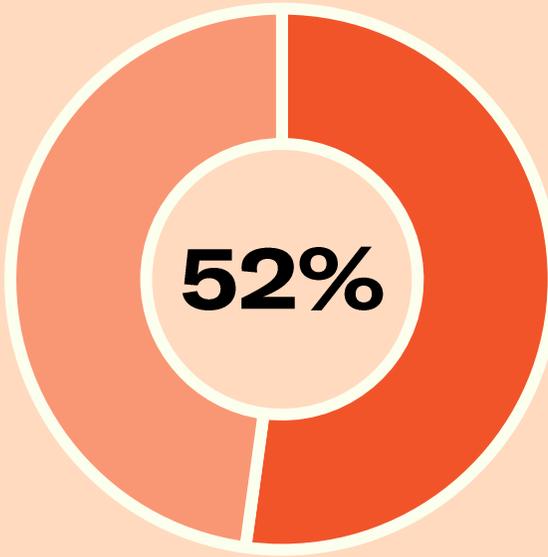
Happy to Live in Nevada



Proud to Live in Nevada



Feel Personal Responsibility to Represent Nevada Well



*vs. 59% of non-tourism employees

Most Washoe tourism workers express an upward trend in their quality of life, better perceptions of Washoe's assets, and lower levels of concern compared to other residents



Current Quality of Life is Better

Tourism workers are much more positive about their current quality of life. More than half (55%) say their quality of life has improved compared to one year ago, a full +13 percentage points higher than those who do not work in tourism.



Access to the Outdoors and Trails are Washoe's Strongest Assets

Nearly all tourism workers agree that Washoe County offers great outdoor access (88%) and plentiful sidewalks, bike lanes, and foot trails (78%). They are also much more likely to say that Washoe County is business-friendly (+15 points) and has many jobs available (+14 points) compared to non-tourism workers.



Climate Risk, Cost, and Housing are Major Concerns

Most tourism workers say Washoe County is at risk from climate-related disasters (54%), though this is a lower rate than other residents (60%). Cost of living is another concern – just one quarter say it is affordable (25%). Similarly, only one-third say there is housing available for all income levels (33%), though again, this represents a higher share than found among other residents (21%).

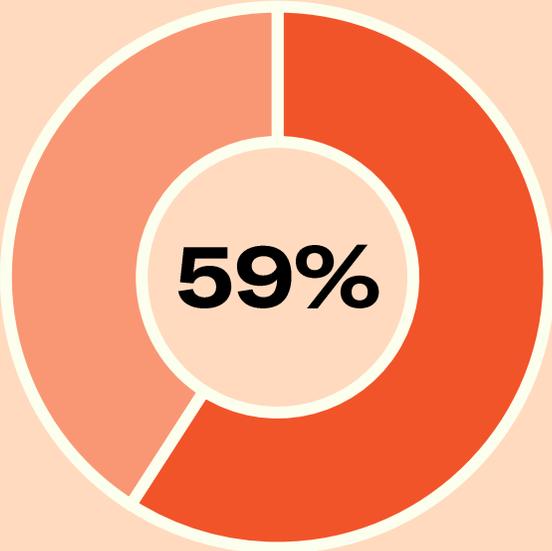


Tourism Workers are Very Optimistic about their Future

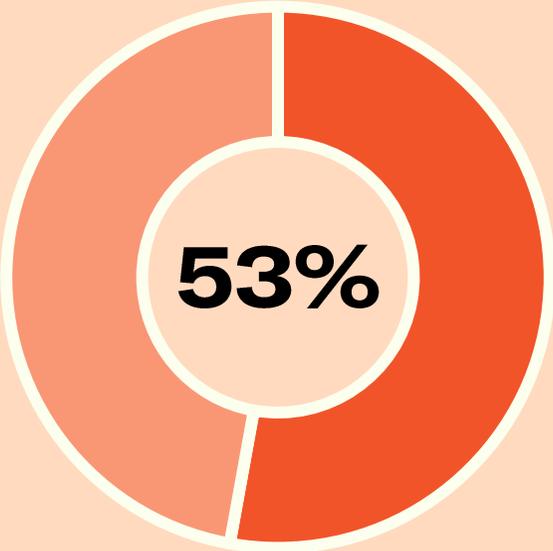
Nearly three quarters of tourism workers (72%) say they expect their personal quality of life to improve in the next year, showing very high rates of optimism for the future, especially compared to other residents – 61% of whom express the same sentiment.

Washoe County tourism workers generally have positive perceptions of the tourism industry, believe it results in better quality of life, and agree it is important for the county's future

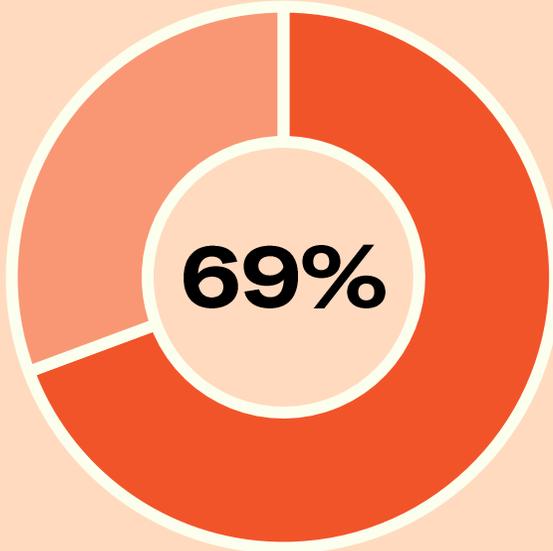
Positive Perception of Washoe County Tourism



Tourism Results in Better Quality of Life for Me



Tourism is Important to Washoe County's Future



Washoe tourism workers have less positive perceptions of the broader impacts of the industry than other residents, but better perceptions of the aspects they are more intimate with

Economic Impact



Although tourism workers are less positive about the economic impact of tourism, they recognize it is critical to Washoe County's future.

Nearly three quarters of tourism workers agree that tourism is very important to Nevada's economy (72%), below those who do not currently work in tourism (-5 points). A slightly smaller but still sizeable percentage agree tourism is important to Washoe County's economy (67%).

A greater proportion of workers say that tourism is important to Washoe County's future (69%, +6 points higher than non-industry workers).

Jobs Impact



Tourism workers have much more positive perceptions of tourism-related jobs compared to those who do not currently work in the industry.

They are more likely to say that there are ample job opportunities (45%, +8 points) and that it is easy to get a job year-round in Washoe County (46%, +11 points). There is still room for improvement of jobs perceptions, however, especially in regards to pay. Just one third say tourism jobs typically pay well (34%).

Community Impact



Tourism workers are generally less positive than others about the community impact of tourism.

While six in ten workers agree that tourism supports festivals, arts and cultural experiences, and sporting events in the local area (62%), this falls below non-industry workers (-9 points). Tourism workers are also less positive about tourism providing more funding for community services (45%, -8 points). They also are more likely to say that tourists bring crowds and traffic to their local area (72%, +9 points).

Personal Impact



Despite community concerns, tourism workers have more positive sentiment about the personal impact of tourism on their lives.

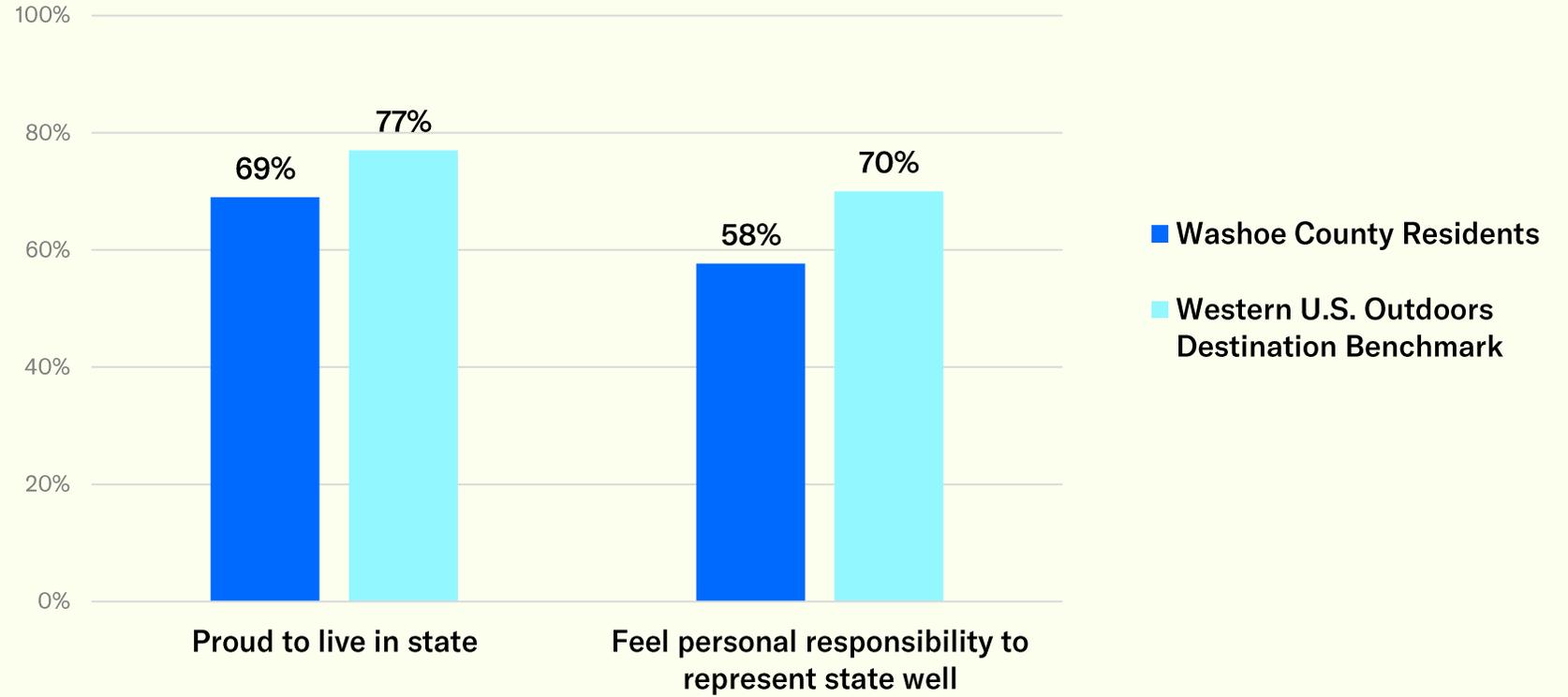
Six in ten say they often frequent tourism businesses, a full +17 points higher than non-tourism employees. They are also more inclined to say they like having tourists in their area (39%, +7 points).

Resident Sentiment KPI Benchmarks

Quality of Life

There is room to improve Washoe County residents' perceptions around quality of life as compared to other western U.S. outdoor-focused destinations. In particular, pride living in their home state, as well as feeling a personal responsibility to represent the state well, both have room for growth in relation to key competitors.

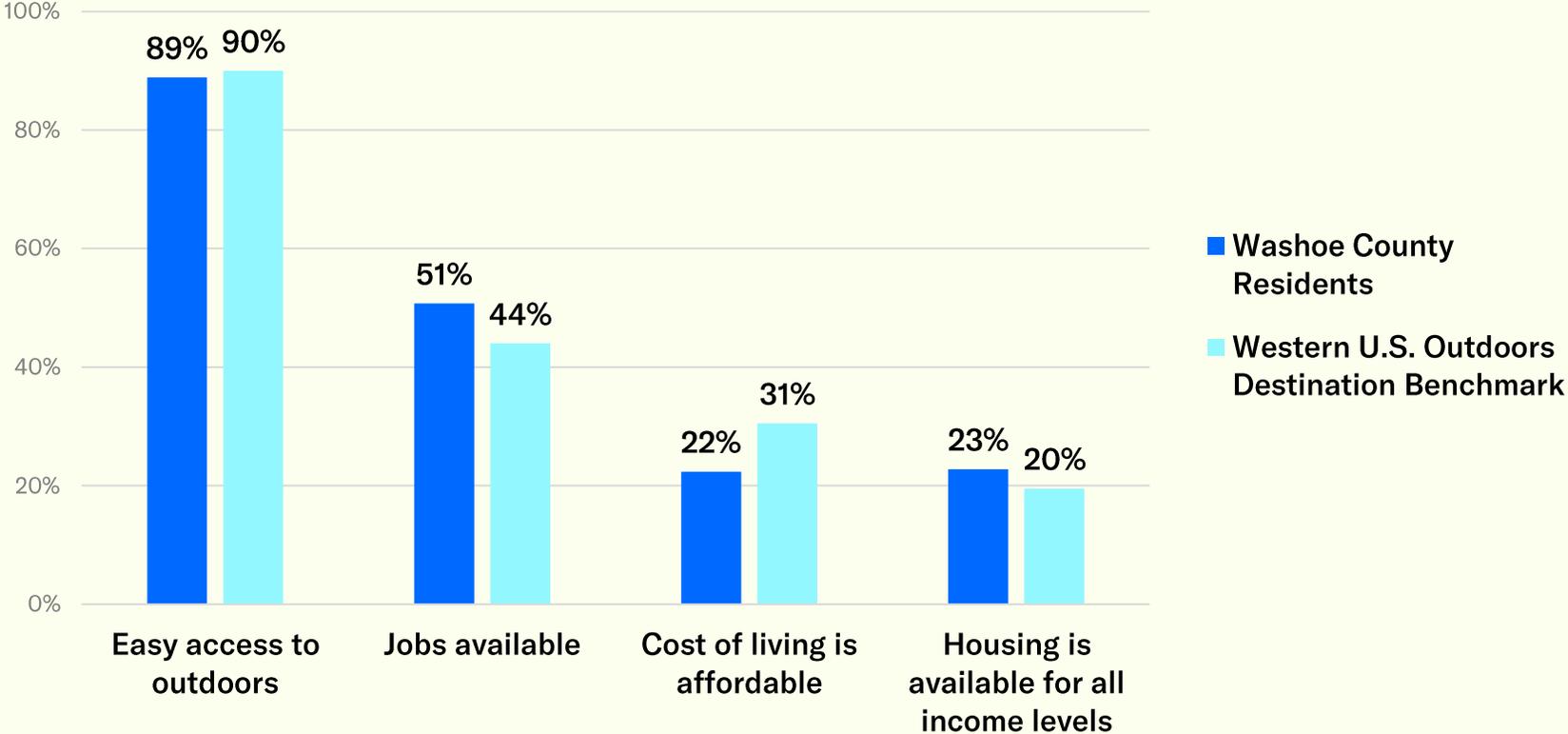
Quality of Life Key Performance Indicators



Regional Assets

In terms of regional assets, Washoe County is aligned with key competitors for easy access to the outdoors. Washoe County also outpaces competitors on perceptions of jobs and housing availability. Washoe County residents, however, have lower perceptions on affordability.

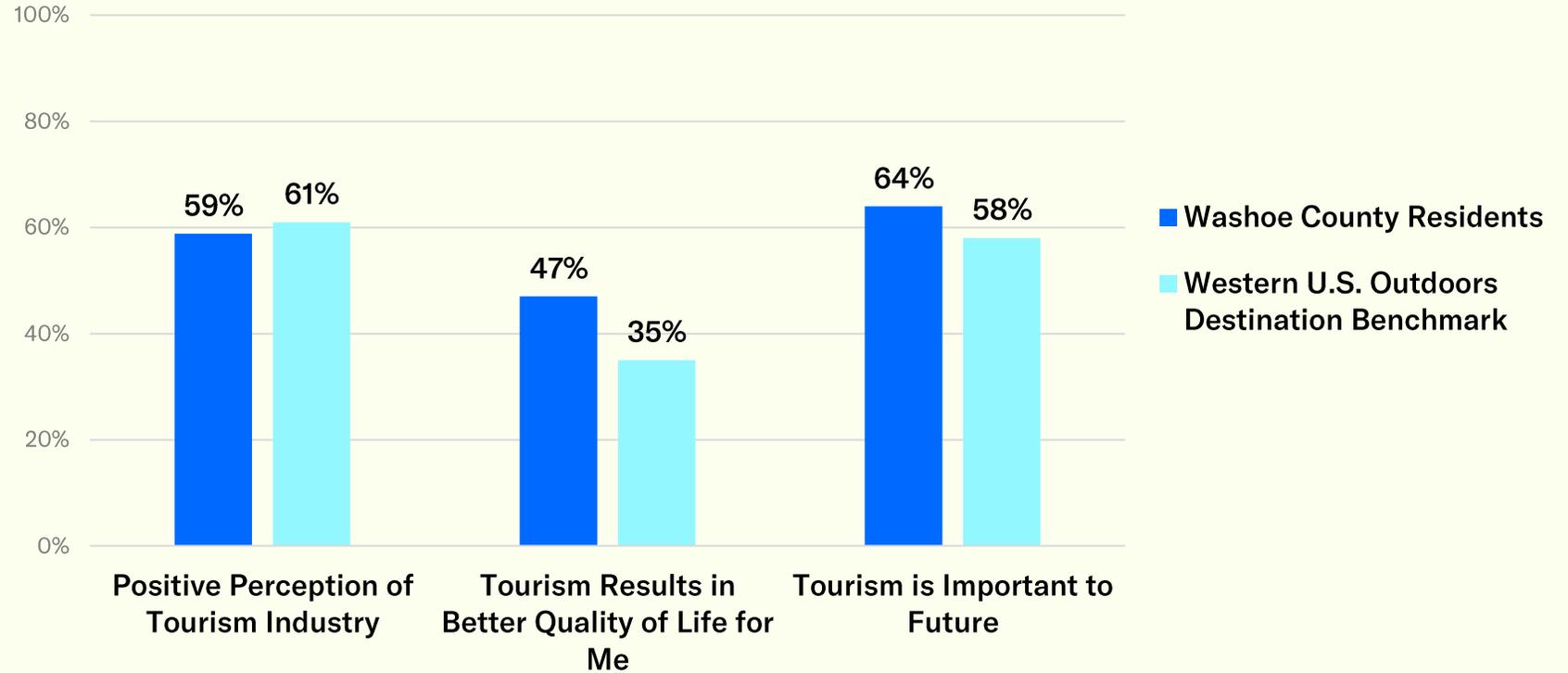
Regional Assets Key Performance Indicators



Tourism Sentiment

In relation to key competitors, Washoe County residents are more likely to say that tourism is important to the future of their area and that tourism results in a better quality of life for themselves and their family. At the same time, however, there is room to improve positive perceptions of Washoe County's tourism industry, which falls slightly behind the benchmark.

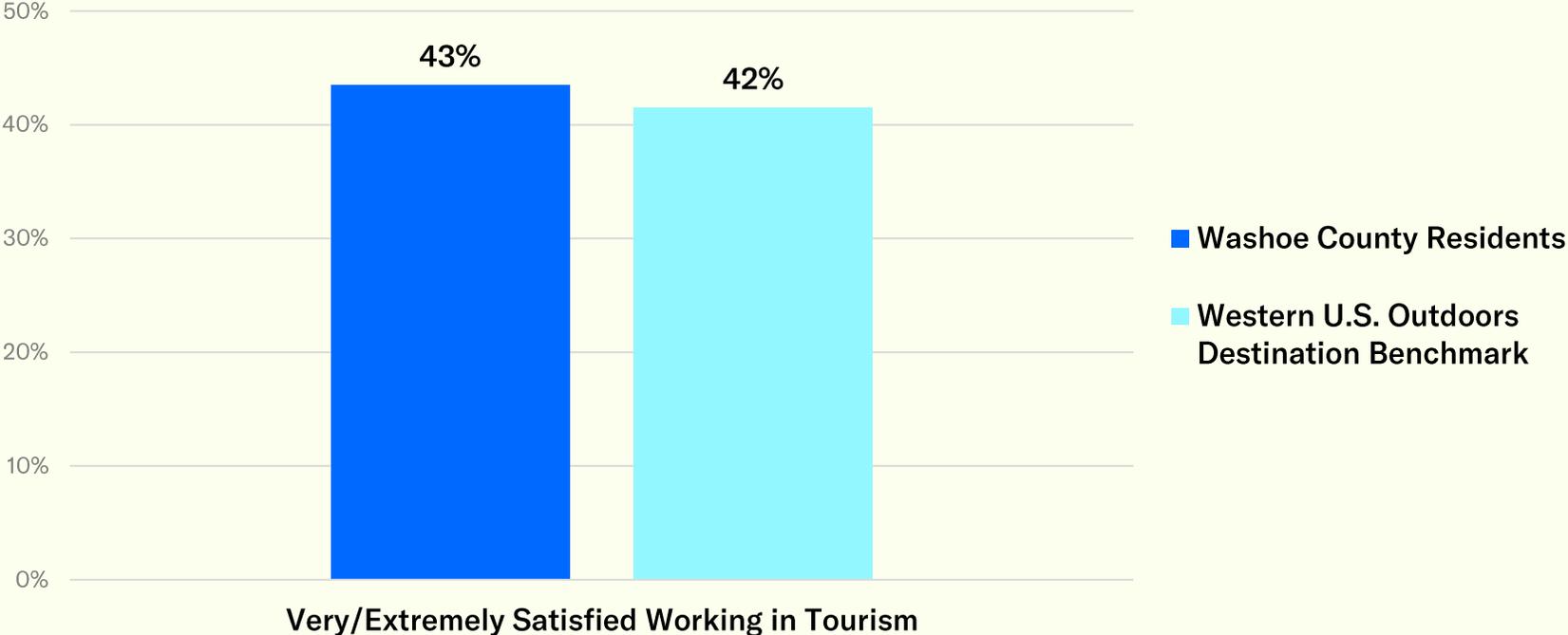
Tourism Sentiment Key Performance Indicators



Tourism Employment Satisfaction

Those who work in tourism or own a business that serves the tourism industry are slightly more satisfied in Washoe County, outpacing other key competitors.

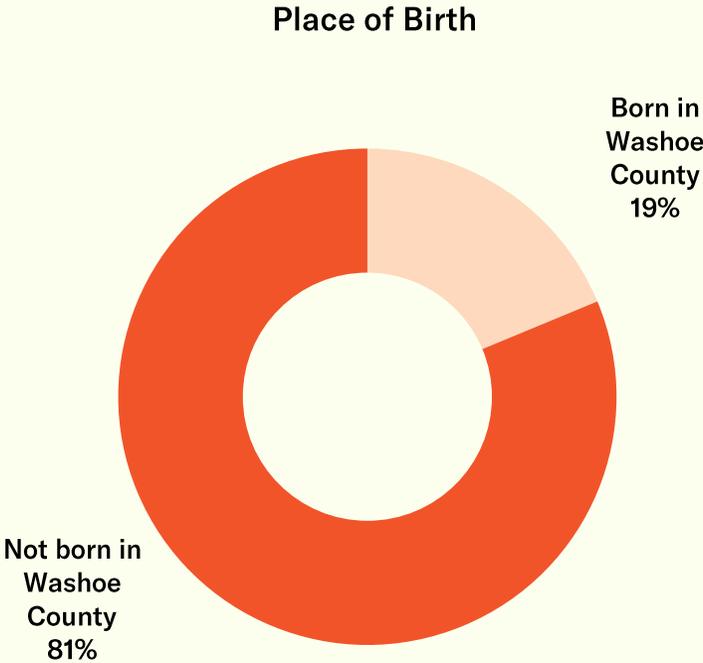
Tourism Employment Satisfaction Key Performance Indicator



Detailed Findings: Life in Washoe County

Place of Birth

Just one in five residents were born in Washoe County (19%); most are transplants (81%).



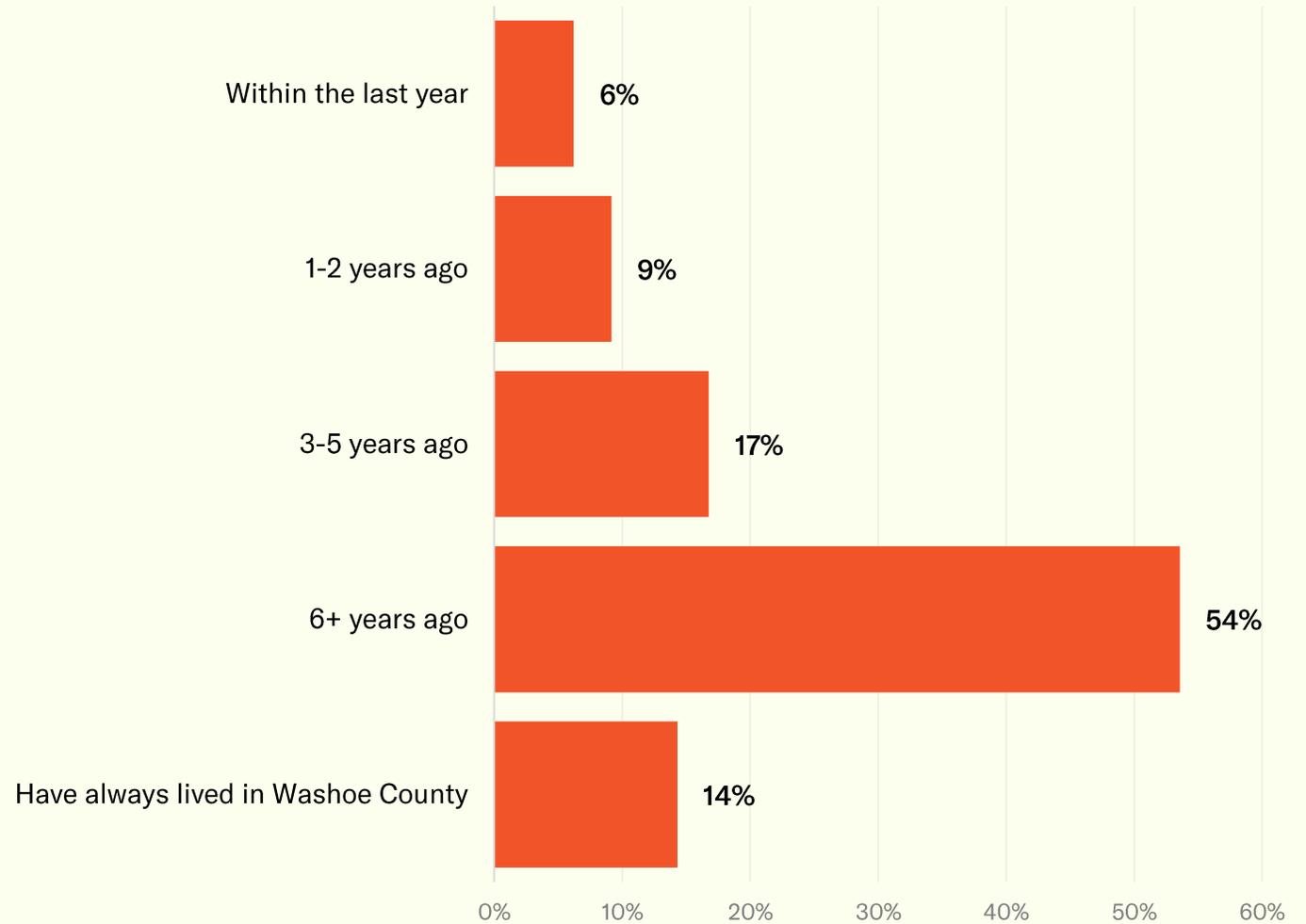
	County	Gen Z	Millennial	Gen X	Boomers+	Works in Tourism	Does Not Work in Tourism
Born in Washoe County	19%	29%	30%	16%	7%	21%	18%
Not Born in Washoe County	81%	71%	70%	84%	93%	79%	82%

Question: Were you born in Washoe County?
 Base: Total. 476 completed surveys.

Time in Washoe County

Most residents have lived long term in Washoe County, with two thirds have lived there six years or longer (68%). Just over one in 7 moved to Washoe County within the last two years (15%).

Timing of Relocation to Washoe County



Question: How long ago did you move to Washoe County?

Base: Total. 476 completed surveys.

Time in Washoe County by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Works in Tourism	Does Not Work in Tourism
Have always lived in Washoe County	14%	23%	22%	11%	6%	16%	14%
6+ years ago	54%	21%	44%	57%	74%	50%	54%
3-5 years ago	17%	22%	18%	21%	10%	12%	18%
1-2 years ago	9%	20%	8%	5%	8%	12%	9%
Within the last year	6%	14%	7%	6%	2%	9%	6%

Question: How long ago did you move to Washoe County?

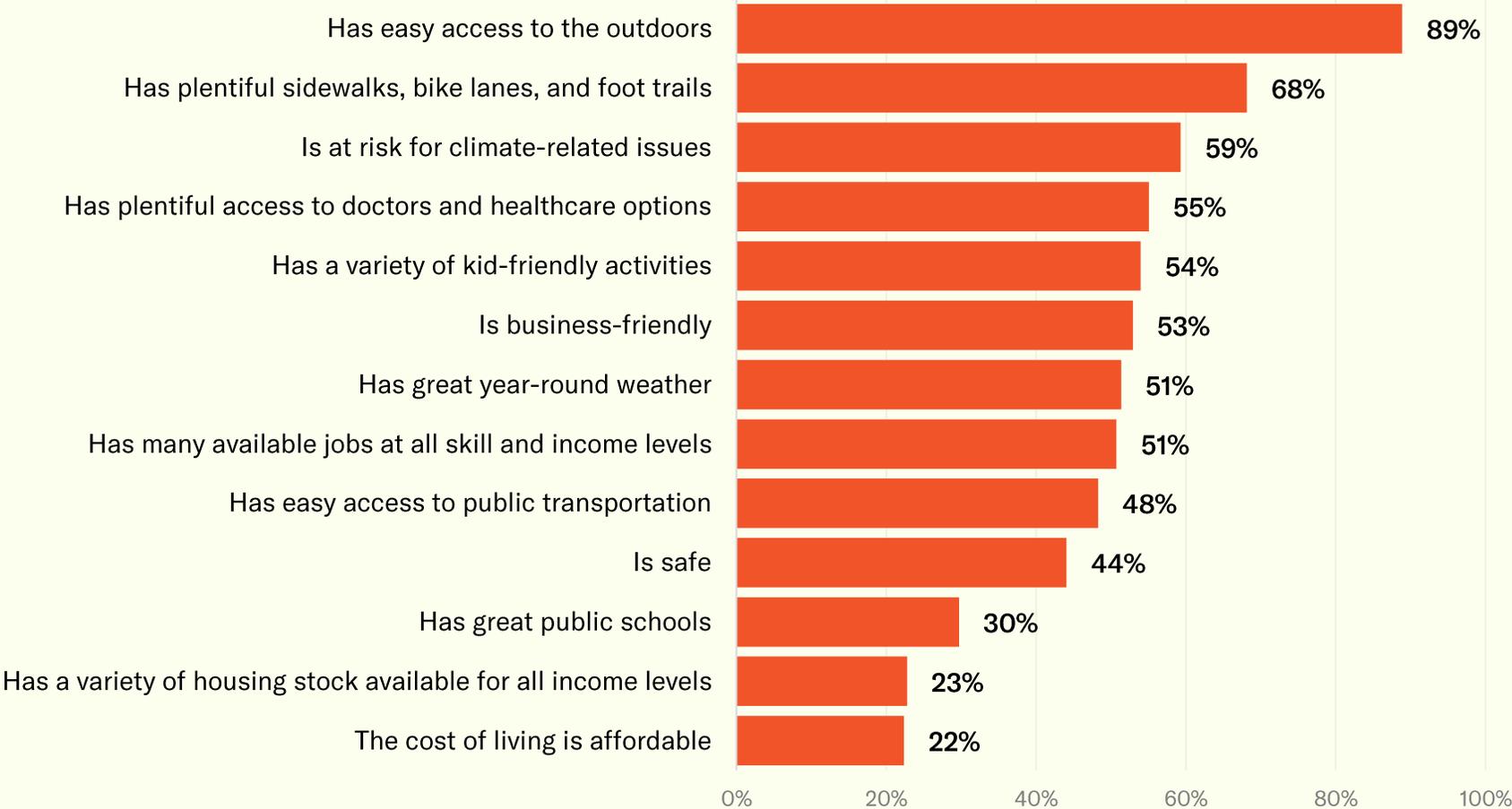
Base: Total. 476 completed surveys.

Washoe County Assets

Nearly all residents agree that Washoe County offers easy access to the outdoors (89%), while seven in ten agree there are plentiful sidewalks, bike lanes, and foot trails (68%). Other key assets include plentiful access to doctors and healthcare (55%), kid-friendly activities (54%), business-friendly (53%), great year-round weather (51%), and jobs available (51%).

At the same time, however, six in ten Washoe County residents are concerned about climate change related issues in the area, such as wildfires (59% agreement). Other areas of concern include safety, public schools, housing stock, and cost of living.

Washoe County Assets (Agreement with Statements)



Question: Please rate how much you agree or disagree with the following statements as it relates to Washoe County.
 Base: Total. 476 completed surveys.

Washoe County Assets by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Works in Tourism	Does Not Work in Tourism
Has easy access to the outdoors	89%	88%	86%	87%	92%	88%	89%
Has plentiful sidewalks, bike lanes, and foot trails	68%	78%	69%	65%	65%	77%	66%
Is at risk for climate-related issues (e.g., wildfires, flooding, etc.)	59%	51%	56%	64%	62%	54%	60%
Has plentiful access to doctors and healthcare options	55%	59%	57%	47%	58%	57%	55%
Has a variety of kid-friendly activities	54%	51%	54%	55%	55%	60%	53%
Is business-friendly (e.g., investment options, tax incentives, etc.)	53%	38%	46%	68%	54%	65%	51%
Has great year-round weather	51%	38%	47%	53%	60%	58%	50%
Has many available jobs at all skill and income levels	51%	47%	56%	47%	51%	62%	49%
Has easy access to public transportation	48%	62%	55%	45%	40%	49%	48%
Is safe	44%	41%	47%	46%	42%	49%	43%
Has great public schools	30%	39%	34%	27%	25%	35%	29%
Has a variety of housing stock available for all income levels	23%	40%	24%	18%	17%	33%	21%
The cost of living is affordable	22%	28%	17%	19%	26%	25%	22%

Question: Please rate how much you agree or disagree with the following statements as it relates to Washoe County. % agreeing.

Base: Total. 476 completed surveys.

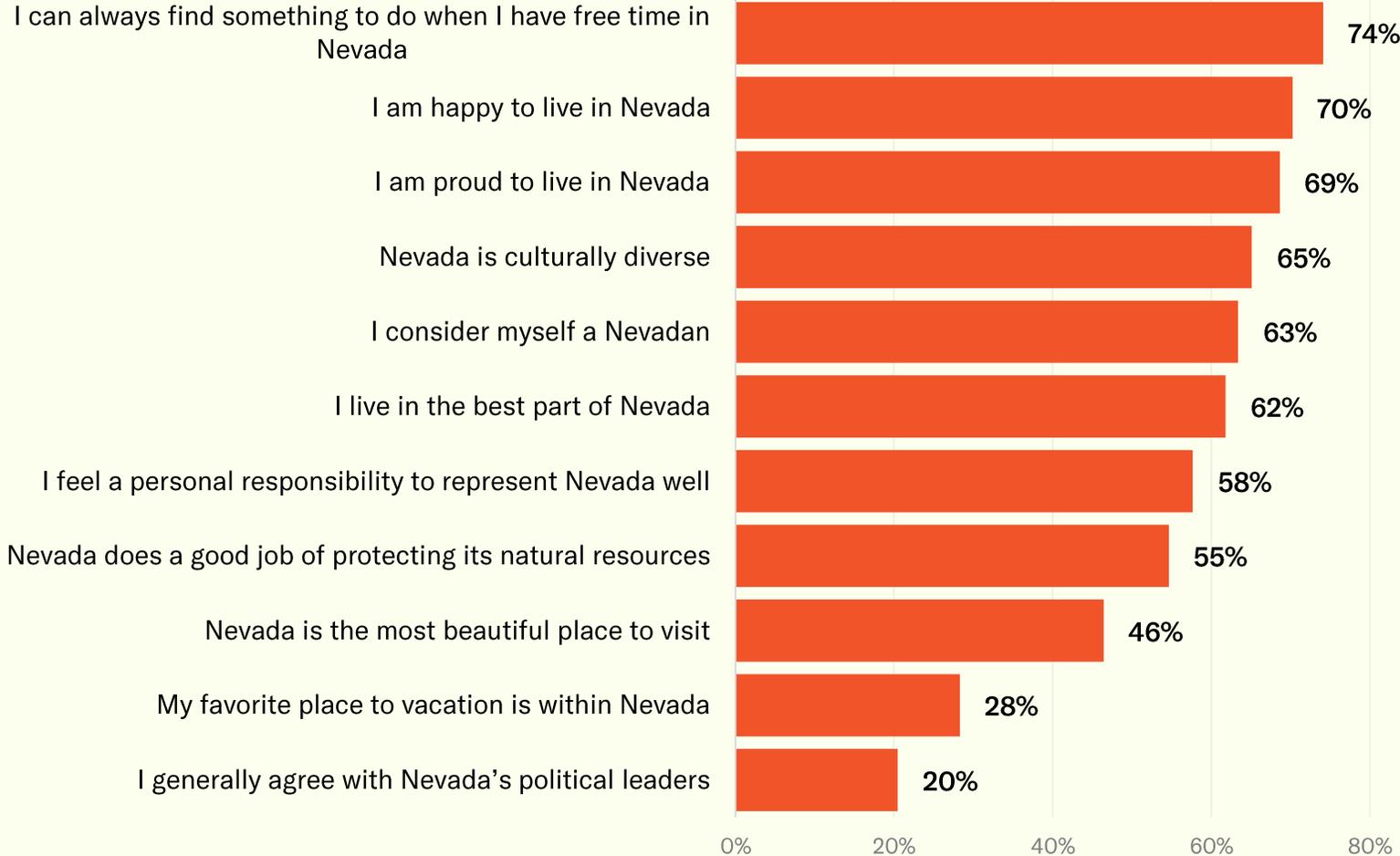
Life in Washoe County Sentiment

Most residents are positive about their experience living in Washoe County, agreeing that they can always find something to do in their free time (74%). Seven in ten are happy to live in Nevada (70%) and/or proud to live in Nevada (69%).

Washoe County residents are less likely to endorse personal leisure travel and visitation sentiments regarding their home state, with less than half agreeing that Nevada is the most beautiful place to visit (46%) and that it is their favorite place to vacation (28%).

Just a small percentage say they agree with Nevada’s political leaders (20%).

Life in Washoe County Sentiment (Agreement with Statements)



Question: Please rate your level of agreement with the following statements.
 Base: Total. 476 completed surveys.

Life in Washoe County Sentiment by Segment

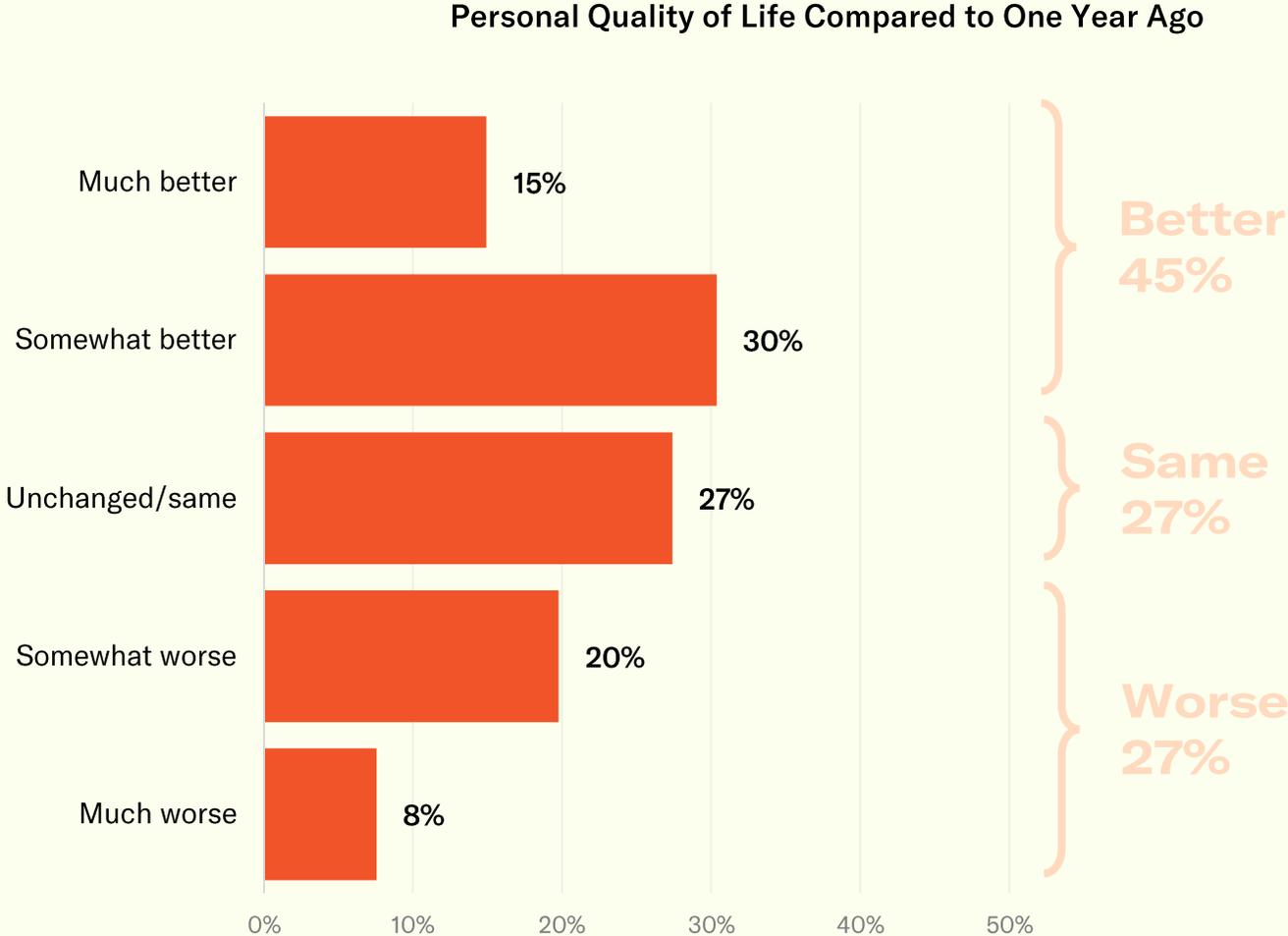
	County	Gen Z	Millennial	Gen X	Boomers+	Works in Tourism	Does Not Work in Tourism
I can always find something to do when I have free time in Nevada	74%	56%	70%	76%	84%	77%	74%
I am happy to live in Nevada	70%	49%	68%	69%	82%	74%	70%
I am proud to live in Nevada	69%	50%	68%	70%	77%	74%	68%
Nevada is culturally diverse	65%	59%	58%	65%	73%	63%	65%
I consider myself a Nevadan	63%	45%	66%	62%	71%	60%	64%
I live in the best part of Nevada	62%	52%	56%	60%	72%	59%	62%
I feel a personal responsibility to represent Nevada well	58%	35%	50%	64%	70%	52%	59%
Nevada does a good job of protecting its natural resources	55%	48%	51%	52%	62%	59%	54%
Nevada is the most beautiful place to visit	46%	22%	46%	44%	60%	41%	47%
My favorite place to vacation is within Nevada	28%	17%	26%	31%	33%	37%	27%
I generally agree with Nevada's political leaders	20%	27%	18%	22%	18%	31%	19%

Question: Please rate your level of agreement with the following statements. % agreeing.

Base: Total. 476 completed surveys.

Quality of Life Compared to One Year Ago

Fewer than half, but a still substantial share (45%), of Washoe County residents say their personal quality of life has improved compared to one year ago while a smaller percentage say they are worse off (27%). Just over one quarter say their quality of life remains unchanged compared to one year ago (27%).



Question: Compared to one year ago, how would you rate your personal quality of life?
Base: Total. 476 completed surveys.

Quality of Life Compared to One Year Ago by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Works in Tourism	Does Not Work in Tourism
Top 2 Box	45%	75.2%	57.5%	38.3%	27.0%	54.9%	43.6%
Much better	15%	25.7%	20.2%	12.3%	7.7%	28.9%	12.5%
Somewhat better	30%	49.5%	37.4%	25.9%	19.3%	25.9%	31.2%
Unchanged/same	27%	16.3%	20.3%	26.6%	38.5%	14.8%	29.6%
Somewhat worse	20%	8.5%	14.8%	19.6%	28.9%	20.6%	19.6%
Much worse	8%	0.0%	7.4%	15.6%	5.6%	9.7%	7.2%
Bottom 2 Box	27%	8.5%	22.2%	35.1%	34.5%	30.4%	26.8%

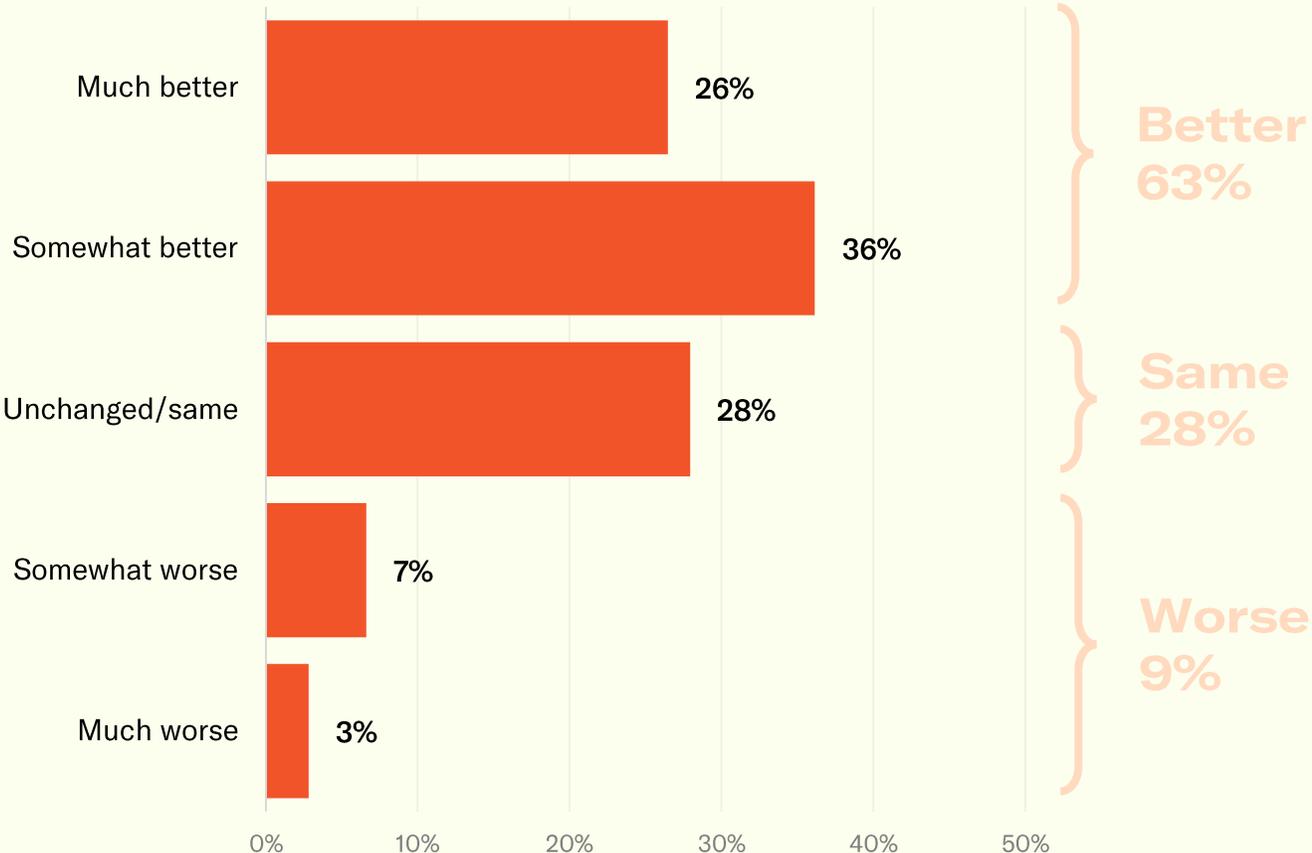
Question: Compared to one year ago, how would you rate your personal quality of life?

Base: Total. 476 completed surveys.

Quality of Life One Year Ahead

Washoe County residents are optimistic about their future quality of life compared to their perception of its change in the past year: Six in ten Washoe County residents are expecting their quality of life to improve in the next year (63%), while one quarter expect it to remain the same (28%). Fewer than one in ten say they expect their quality of life to worsen (9%).

Expectation of Change in Personal Quality of Life Looking One Year Ahead



Question: Thinking one year ahead, how do you expect your personal quality of life to change?
Base: Total. 476 completed surveys.

Quality of Life One Year Ahead by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Works in Tourism	Does Not Work in Tourism
Top 2 box	63%	87%	76%	65%	39%	72%	61%
Much better	26%	43%	39%	24%	11%	42%	24%
Somewhat better	36%	44%	37%	41%	28%	30%	37%
Unchanged/same	28%	13%	20%	23%	45%	19%	30%
Somewhat worse	7%	0%	3%	4%	14%	5%	7%
Much worse	3%	0%	2%	8%	2%	4%	3%
Bottom 2 box	9%	0%	5%	12%	16%	9%	9%

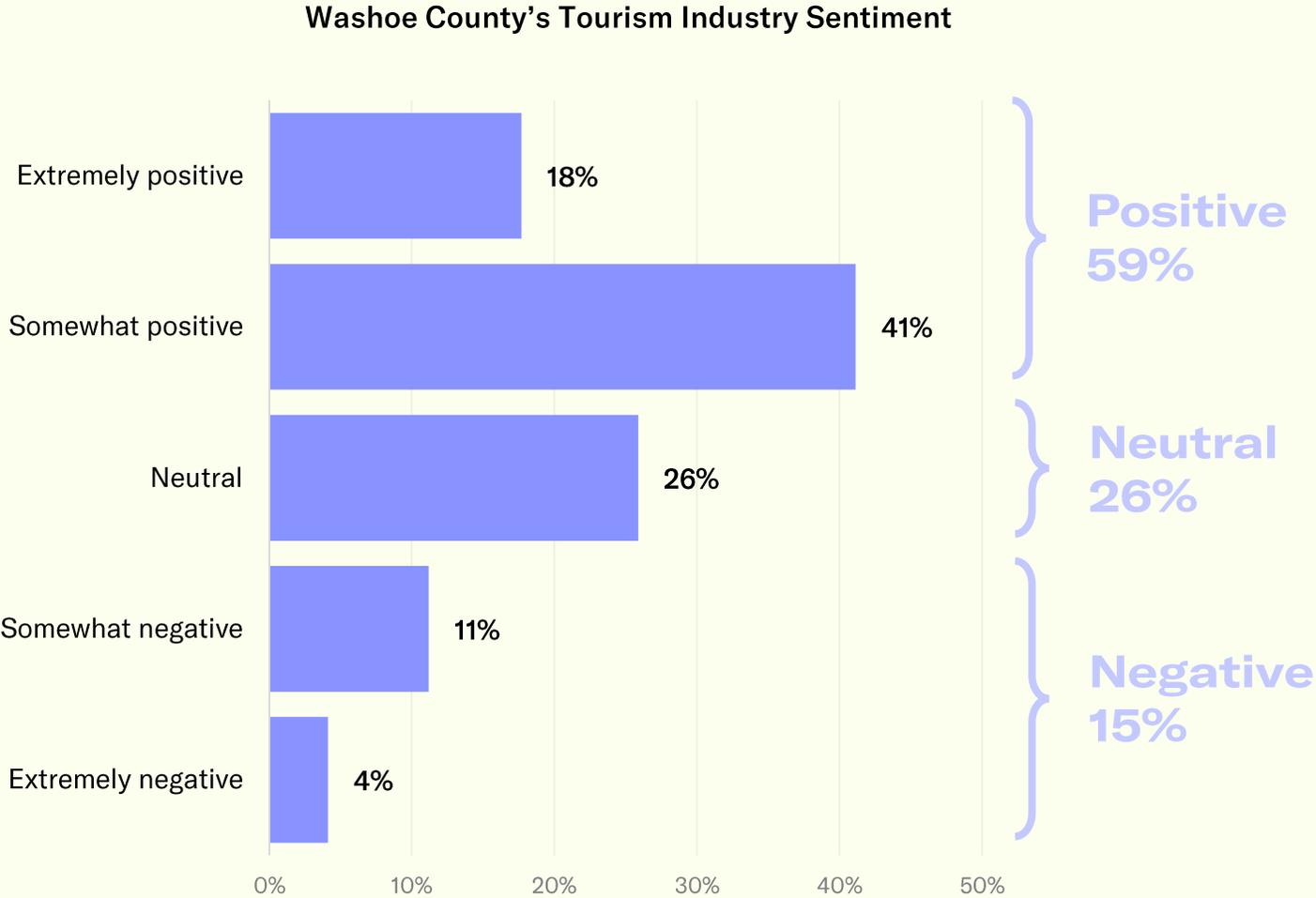
Question: Thinking one year ahead, how do you expect your personal quality of life to change?

Base: Total. 476 completed surveys.

Detailed Findings: Tourism Sentiment

Washoe County Tourism Sentiment

Six in ten Washoe County residents have positive perceptions about the region’s tourism industry (59%). A much smaller percentage hold negative perceptions about tourism (15%).



Question: In general, what are your overall perceptions of Washoe County’s tourism industry?

Base: Total. 476 completed surveys.

Washoe County Tourism Sentiment by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
Top 2 Box	59%	50%	58%	56%	65%	59%	59%
Extremely positive	18%	13%	16%	16%	23%	21%	17%
Somewhat positive	41%	37%	42%	41%	43%	38%	42%
Neutral	26%	40%	33%	22%	17%	23%	26%
Somewhat negative	11%	9%	7%	15%	12%	11%	11%
Extremely negative	4%	2%	2%	6%	6%	7%	4%
Bottom 2 Box	15%	11%	9%	21%	18%	18%	15%

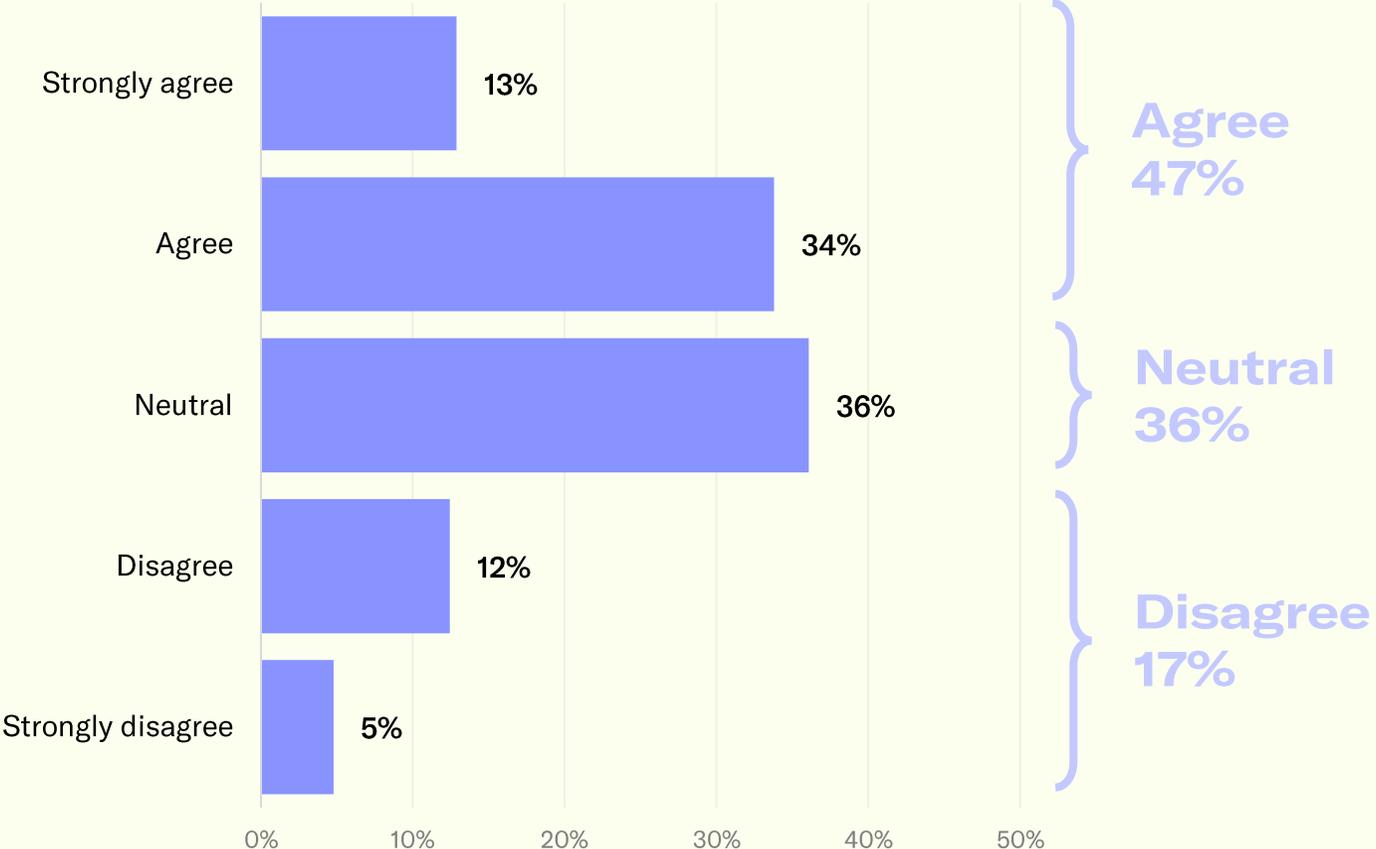
Question: In general, what are your overall perceptions of Washoe County’s tourism industry? % selecting “somewhat positive” or “extremely positive”

Base: Total. 476 completed surveys.

Impact of Washoe County Tourism on Quality of Life

Nearly half of Washoe County residents agree that the tourism industry results in a better quality of life for them and their families (47%). Less than one in five disagree with this statement (17%).

Agreement that
“Washoe County’s Tourism Industry Results in a Better Quality of Life for Me and My Family”



Question: Please rate how much you agree or disagree with the following statement: Overall, Washoe County’s tourism industry results in a better quality of life for me and my family.

Base: Total. 476 completed surveys.

Impact of Washoe County Tourism on Quality of Life by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
Top 2 Box	78%	65%	78%	81%	80%	82%	78%
Strongly agree	70%	56%	69%	74%	74%	77%	69%
Agree	71%	65%	72%	73%	71%	76%	70%
Neutral	69%	55%	68%	71%	72%	76%	67%
Disagree	45%	40%	45%	48%	44%	57%	43%
Strongly disagree	42%	43%	46%	42%	39%	53%	41%
Bottom 2 Box	16%	24%	15%	12%	17%	23%	15%

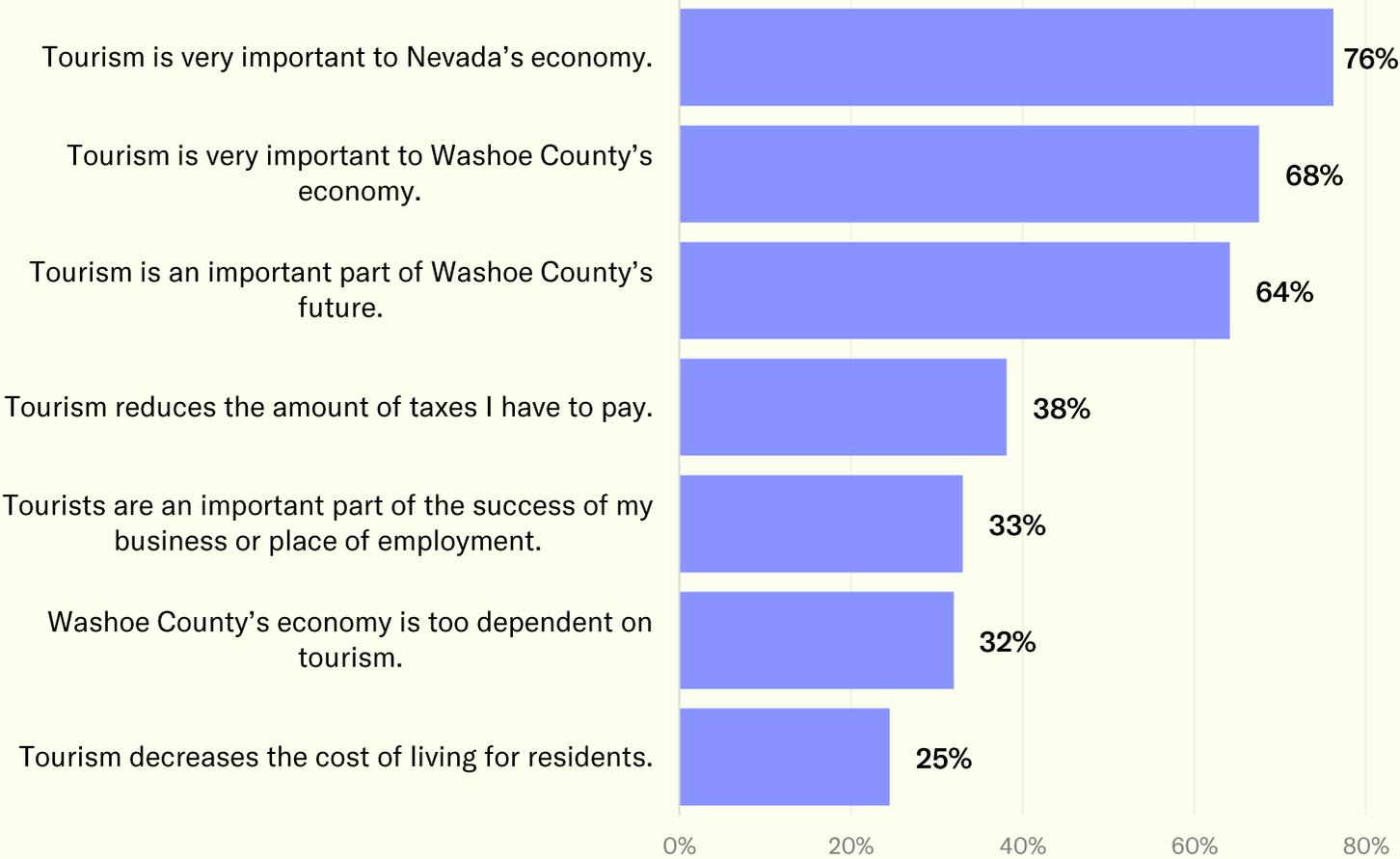
Question: Please rate how much you agree or disagree with the following statement: Overall, Washoe County’s tourism industry results in a better quality of life for me and my family. % agreeing.

Base: Total. 476 completed surveys.

Economic Impact Sentiment

Three-quarters of Washoe County residents agree that tourism is very important to Nevada’s economy (76%), while a slightly smaller percentage agree that tourism is very important to Washoe County’s economy (68%). Two-thirds of residents also agree that tourism is an important part of Washoe County’s future (64%).

Economic Impact of Tourism (Agreement with Statements)



Question: Thinking about tourism and its impact on the economy, please rate how much you agree with the following statements.
Base: Total. 476 completed surveys.

Economic Impact Sentiment by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
Tourism is very important to Nevada’s economy.	76%	51%	77%	83%	83%	72%	77%
Tourism is very important to Washoe County’s economy.	68%	34%	67%	72%	81%	67%	68%
Tourism is an important part of Washoe County’s future.	64%	41%	65%	71%	69%	69%	63%
Tourism reduces the amount of taxes I have to pay.	38%	26%	39%	33%	47%	31%	39%
Tourists are an important part of the success of my business or place of employment.	33%	35%	30%	45%	26%	60%	28%
Washoe County’s economy is too dependent on tourism.	32%	18%	40%	34%	32%	34%	32%
Tourism decreases the cost of living for residents.	25%	20%	21%	23%	30%	24%	25%

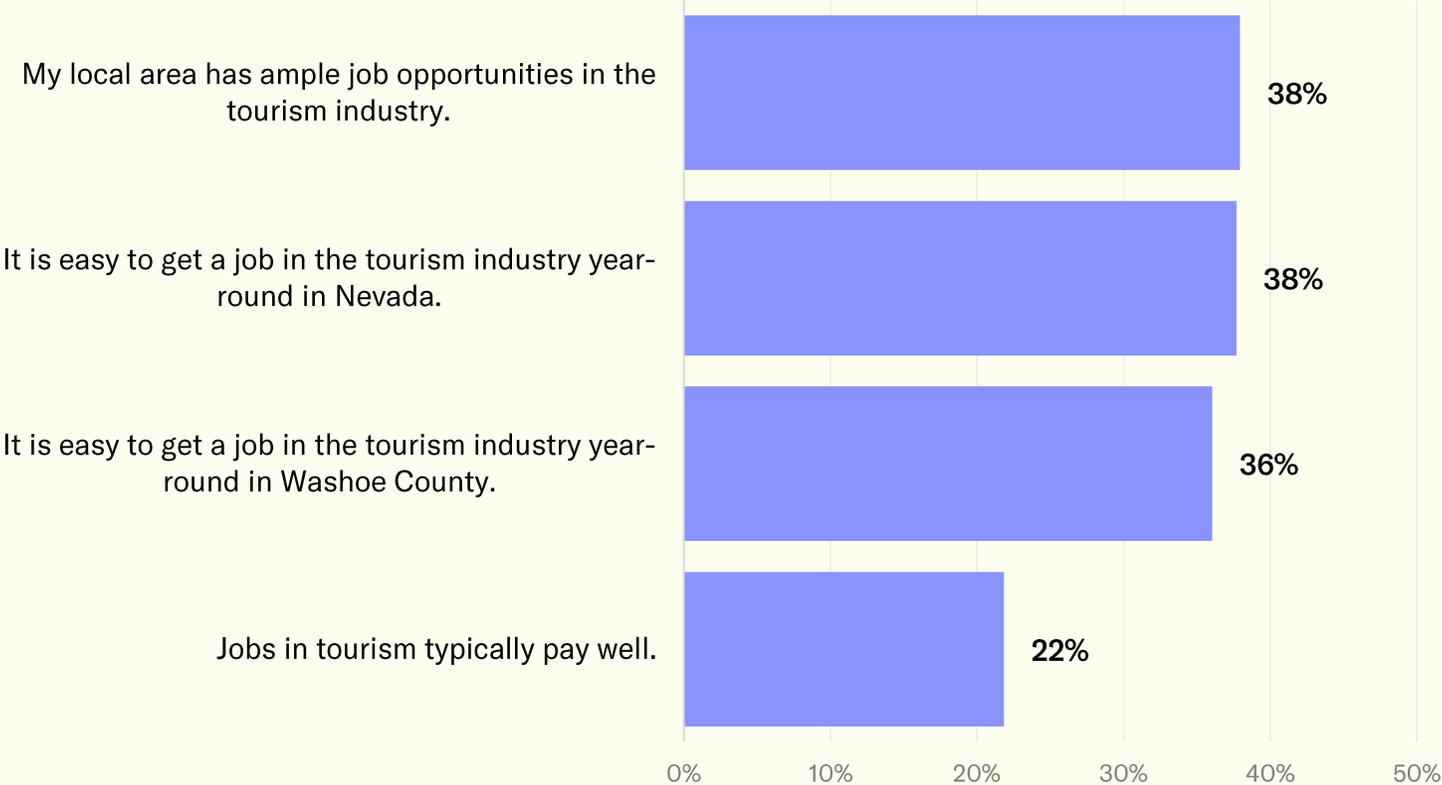
Question: Thinking about tourism and its impact on the economy, please rate how much you agree with the following statements. % agreeing.

Base: Total. 476 completed surveys.

Jobs Impact Sentiment

Just over one-third of Washoe County residents agree that there are ample jobs within the tourism industry both locally and statewide (38%), while 36 percent say that it is easy to get a job in tourism year-round.

Impact of Tourism on Jobs (Agreement with Statements)



Question: Thinking about tourism and its impact on jobs, please rate how much you agree with the following statements.

Base: Total. 476 completed surveys.

Jobs Impact Sentiment by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
My local area has ample job opportunities in the tourism industry.	38%	37%	35%	36%	42%	45%	37%
It is easy to get a job in the tourism industry year-round in Nevada.	38%	31%	37%	40%	40%	45%	36%
It is easy to get a job in the tourism industry year-round in Washoe County.	36%	31%	36%	34%	40%	46%	34%
Jobs in tourism typically pay well.	22%	28%	24%	15%	22%	34%	20%

Question: Thinking about tourism and its impact on jobs, please rate how much you agree with the following statements. % agreeing.

Base: Total. 476 completed surveys.

Community Impact Sentiment

Around seven in ten Washoe County residents are concerned about housing prices in the area (72%) and the traffic and crowding visitors bring to their community (64%). At the same time, however, a similarly high percentage are also aware the tourism helps support festivals, arts, culture, and sporting events in the area (70%), and six in ten residents agree that tourism creates new dining, entertainment, and shopping amenities (60%).

Community Impact of Tourism (Agreement with Statements)



Question: Thinking about tourism and its impact on the community, please rate how much you agree with the following statements.

Base: Total. 476 completed surveys.

Community Impact Sentiment by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
I'm worried about housing prices in my local area	72%	57%	77%	78%	71%	69%	72%
Tourism helps support festivals, arts and culture experiences, and sporting events in local area.	70%	51%	70%	69%	79%	62%	71%
Tourists bring crowds and traffic to my community.	64%	51%	68%	64%	68%	72%	63%
Tourism helps create new dining, entertainment, and shopping amenities in my local area.	60%	49%	63%	60%	63%	59%	60%
Increased visitor spending will result in more funding for community services.	52%	42%	54%	52%	55%	45%	53%
Tourism is an important source of funding for environmental improvement projects.	45%	29%	52%	42%	49%	48%	44%
More tourism in Washoe County would benefit its residents.	44%	28%	39%	51%	49%	47%	43%
Tourists drive up in-state travel costs for residents.	36%	38%	46%	35%	26%	33%	36%
Tourists are responsible for most of the littering in my area.	35%	35%	35%	38%	34%	35%	35%
Local employees in the tourism industry don't receive strong support from their management.	32%	27%	35%	34%	32%	30%	33%
Tourism negatively impacts Nevada's natural resources.	31%	40%	33%	33%	25%	27%	32%
Tourists treat Washoe County with respect.	31%	29%	31%	26%	34%	36%	30%
Tourists treat my community with respect.	30%	34%	33%	21%	31%	29%	30%
Tourists make my community less safe.	28%	35%	30%	28%	24%	31%	28%
I am worried about the impact tourism has on our community culture.	28%	38%	31%	25%	23%	29%	28%
Local employees in the tourism industry aren't treated well by customers.	24%	32%	33%	24%	15%	23%	25%

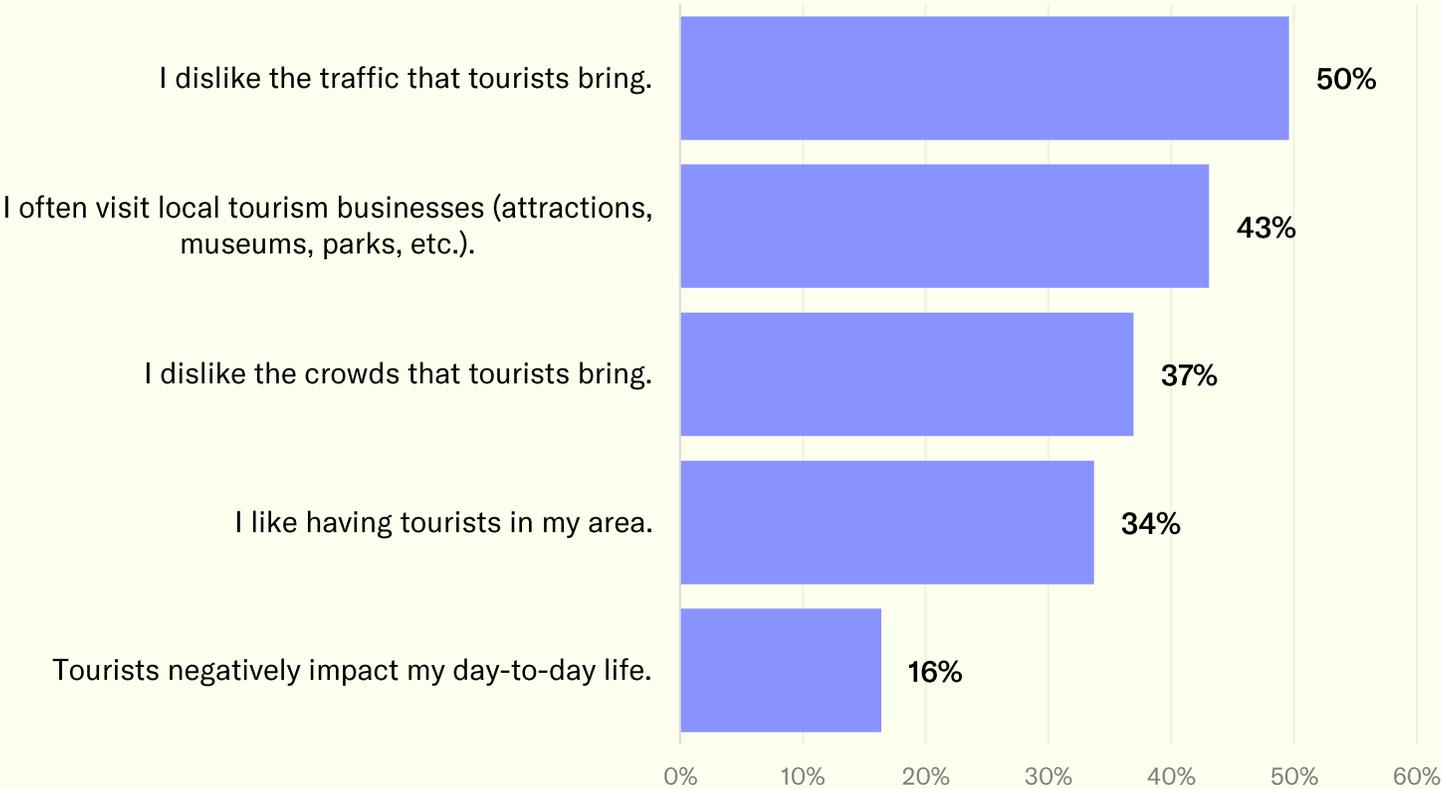
Question: Thinking about tourism and its impact on the community, please rate how much you agree with the following statements. % agreeing.

Base: Total. 476 completed surveys.

Personal Impact Sentiment

Half of Washoe County residents dislike the traffic that visitors create (50%), while a little over one-third say they dislike the crowds (37%). At the same time, four in ten residents also acknowledge that they often visit local tourism spots themselves (43%).

Personal Impact of Tourism (Agreement with Statements)



Question: Thinking about tourism and its impact on you personally, please rate how much you agree with the following statements.

Base: Total. 476 completed surveys.

Personal Impact Sentiment by Segment

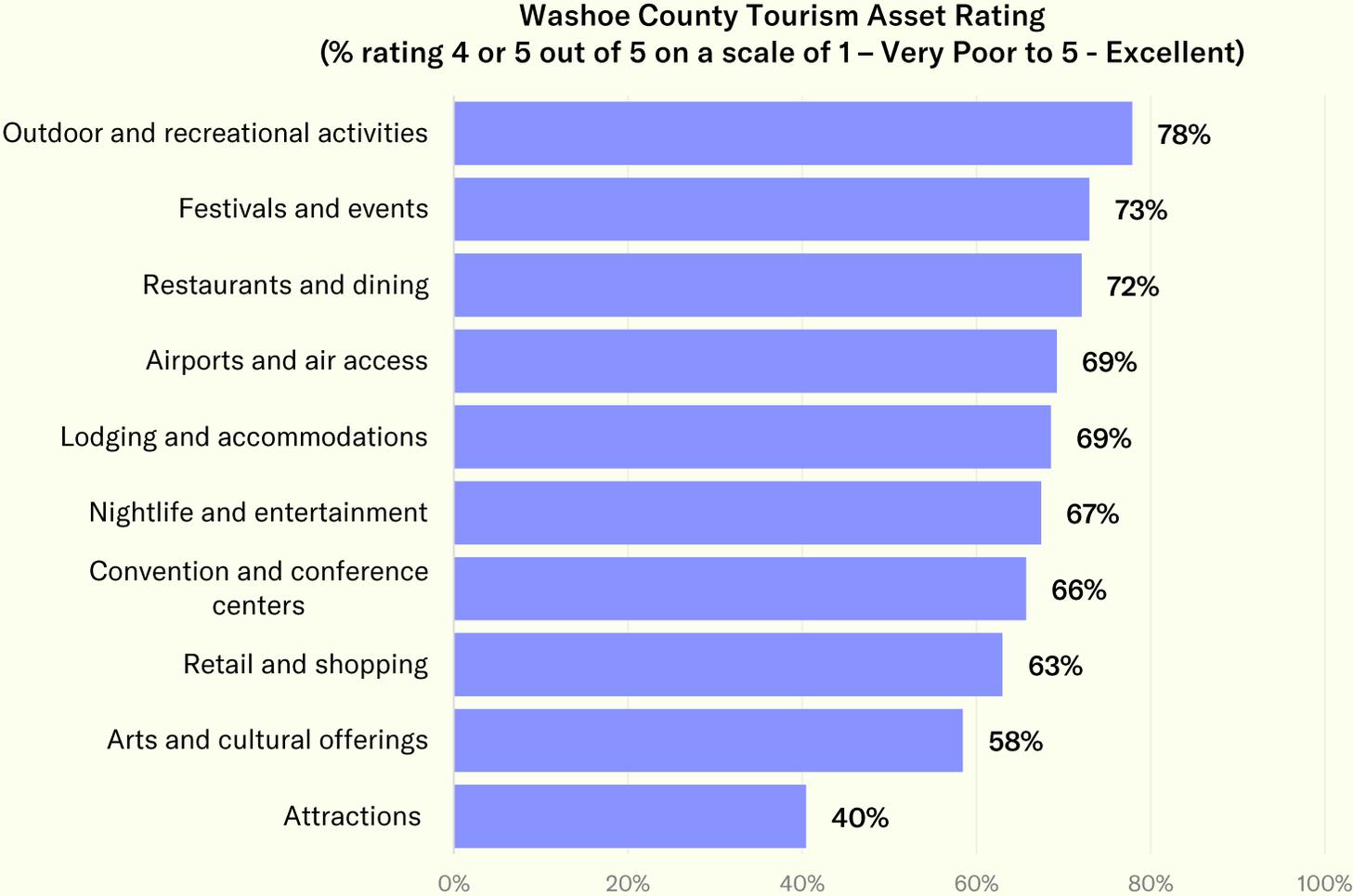
	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
I dislike the traffic that tourists bring.	50%	43%	57%	50%	47%	41%	51%
I often visit local tourism businesses (attractions, museums, parks, etc.).	43%	34%	47%	44%	44%	57%	41%
I dislike the crowds that tourists bring.	37%	40%	41%	40%	31%	27%	39%
I like having tourists in my area.	34%	25%	40%	26%	39%	39%	33%
Tourists negatively impact my day-to-day life.	16%	25%	17%	17%	11%	15%	17%

Question: Thinking about tourism and its impact on you personally, please rate how much you agree with the following statements. % agreeing.

Base: Total. 476 completed surveys.

Washoe County Tourism Asset Rating

Overall, Washoe County residents recognize that the outdoors and recreational activities are their biggest tourism asset (78%), followed by festivals and events (73%), as well as restaurants and dining (72%).



Question: To the best of your knowledge, please rate the quality of Washoe County’s tourism offerings.
Base: Total. 476 completed surveys.

Washoe County Tourism Asset Rating by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
Outdoor and recreational activities	78%	72%	76%	76%	83%	78%	78%
Festivals and events	73%	61%	71%	71%	81%	74%	73%
Restaurants and dining	72%	71%	79%	63%	74%	73%	72%
Airports and air access	69%	52%	70%	68%	77%	65%	70%
Lodging and accommodations	69%	60%	69%	68%	73%	72%	68%
Nightlife and entertainment	67%	62%	74%	52%	76%	68%	67%
Convention and conference centers	66%	60%	66%	63%	70%	71%	65%
Retail and shopping	63%	65%	63%	53%	69%	62%	63%
Arts and cultural offerings (e.g., museums, art galleries, performances, etc.)	58%	48%	62%	49%	67%	62%	58%
Attractions (e.g., theme parks, zoos, etc.)	40%	48%	41%	32%	43%	44%	40%

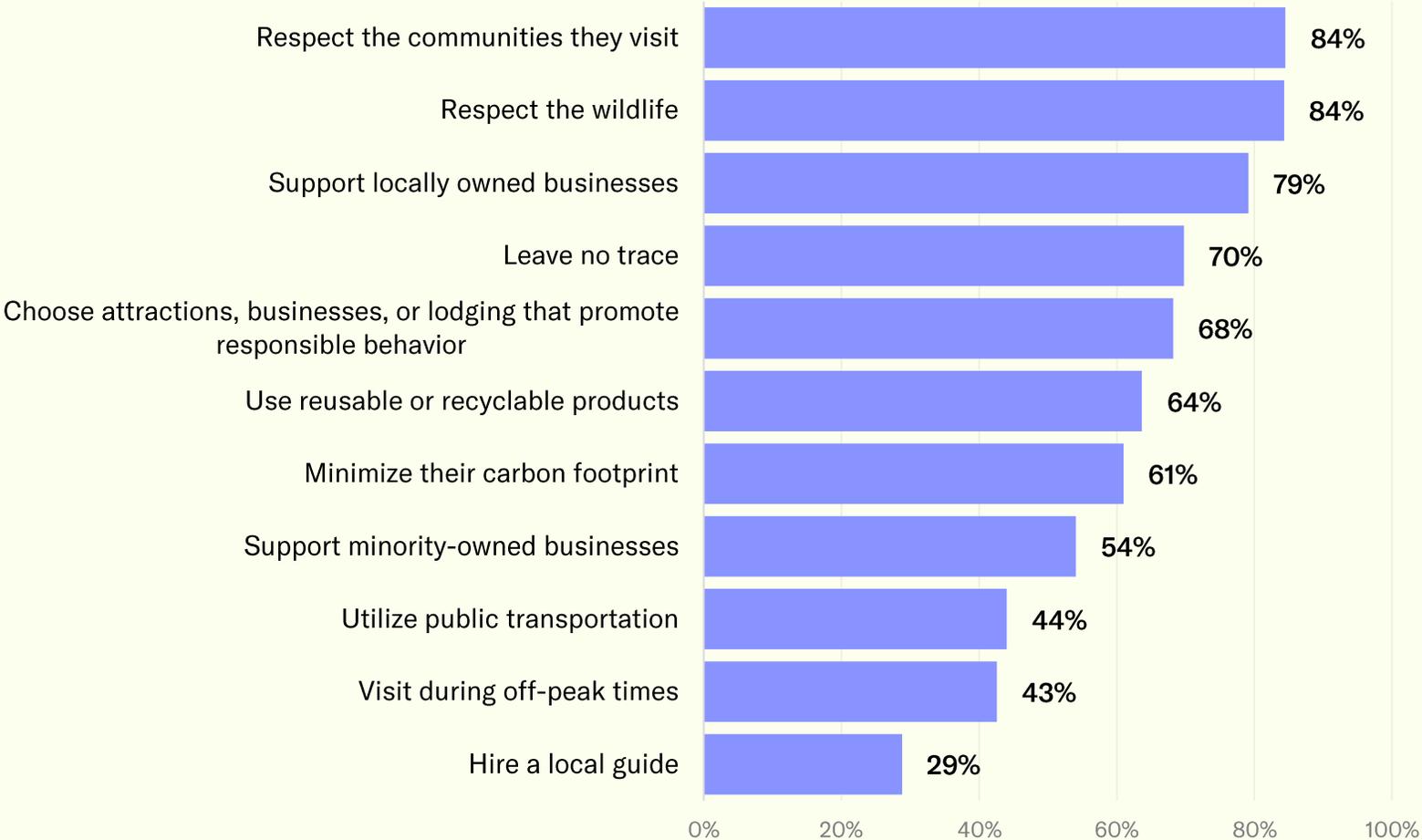
Question: To the best of your knowledge, please rate the quality of Washoe County’s tourism offerings. % rating 4 or 5 on a scale of 1 – Very Poor to 5 – Excellent.

Base: Total. 476 completed surveys.

Importance of Visitor Actions

A vast majority of residents agree that it is important for visitors to respect wildlife (84%) and respect the communities they visit (84%). Similarly high proportions also agree that it is important visitors support locally owned businesses (79%) and/or leave no trace (70%).

Importance of Visitor Actions
(% Rating Highly Important, i.e. 4 or 5 on a scale of 1 – Not at all important to 5 – Extremely Important)



Question: In your opinion, how important is it that visitors to Washoe County...
Base: Total. 476 completed surveys.

Importance of Visitor Actions by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
Respect the communities they visit	84%	69%	87%	87%	88%	82%	85%
Respect the wildlife	84%	75%	83%	86%	89%	76%	86%
Support locally owned businesses	79%	63%	83%	80%	83%	75%	80%
Leave no trace	70%	60%	67%	73%	74%	58%	72%
Choose attractions, businesses, or lodging that promote responsible behavior	68%	65%	66%	64%	75%	65%	69%
Use reusable or recyclable products	64%	58%	63%	60%	69%	57%	65%
Minimize their carbon footprint	61%	63%	64%	61%	58%	60%	61%
Support minority-owned businesses	54%	54%	60%	55%	49%	53%	54%
Utilize public transportation	44%	58%	52%	39%	35%	51%	43%
Visit during off-peak times	43%	49%	46%	47%	34%	50%	41%
Hire a local guide	29%	35%	36%	26%	23%	35%	28%

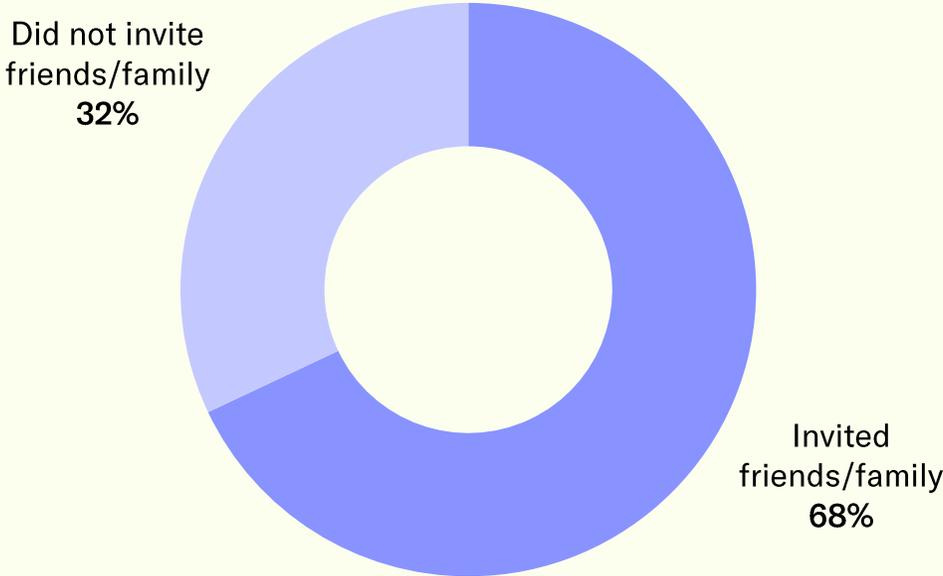
Question: In your opinion, how important is it that visitors to Washoe County... % rating 4 or 5 on a scale of 1 – Not at all important to 5 – extremely important.

Base: Total. 476 completed surveys.

Inviting Out-of-State Friends/Family to Visit

Nearly seven in ten residents invited out-of-state friends and family to visit them in Washoe County in the past year, with lower rates among the Gen Z age cohort and higher rates among the Boomers+ age cohort.

Invited Friends/Family to Visit Past 12 Months



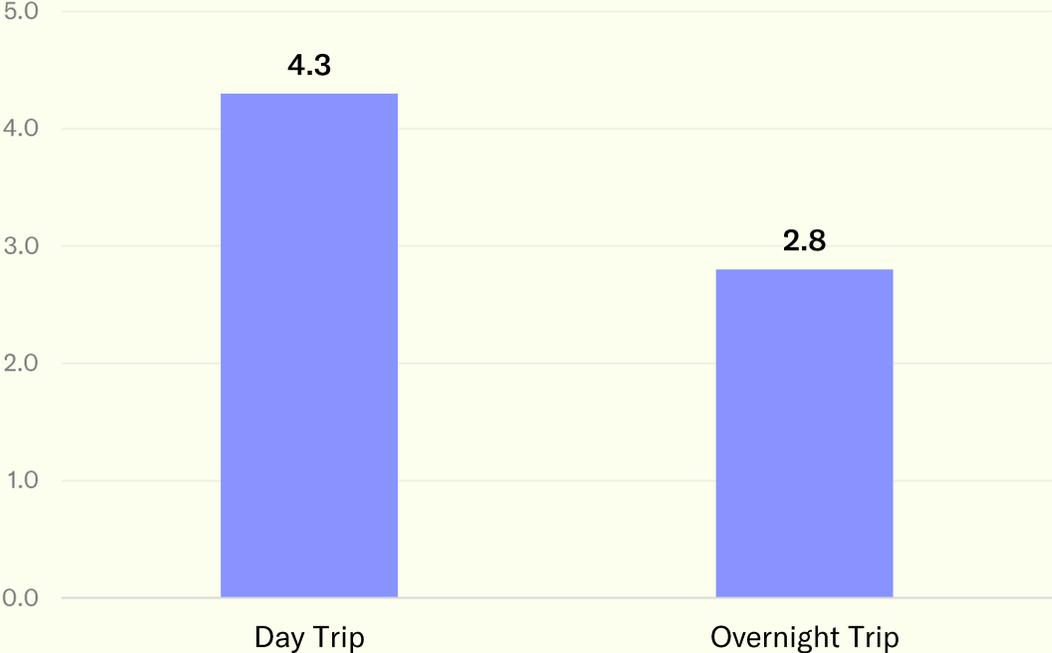
	Invited friends/family	Did not invite friends/family
County	68%	32%
Gen Z	58%	42%
Millennials	68%	32%
Gen X	64%	36%
Boomers +	76%	24%
Tourism Employee	74%	26%
Non-Tourism Employee	67%	33%

Question: Have you invited out-of-state friends and/or family to visit you in the past 12 months?
 Base: Total. 476 completed surveys.

Past-Year Trips within Washoe County

On average, residents have taken 4.3 day trips and 2.8 overnight trips within Washoe County in the past year.

Average Past-Year Trips within Washoe County

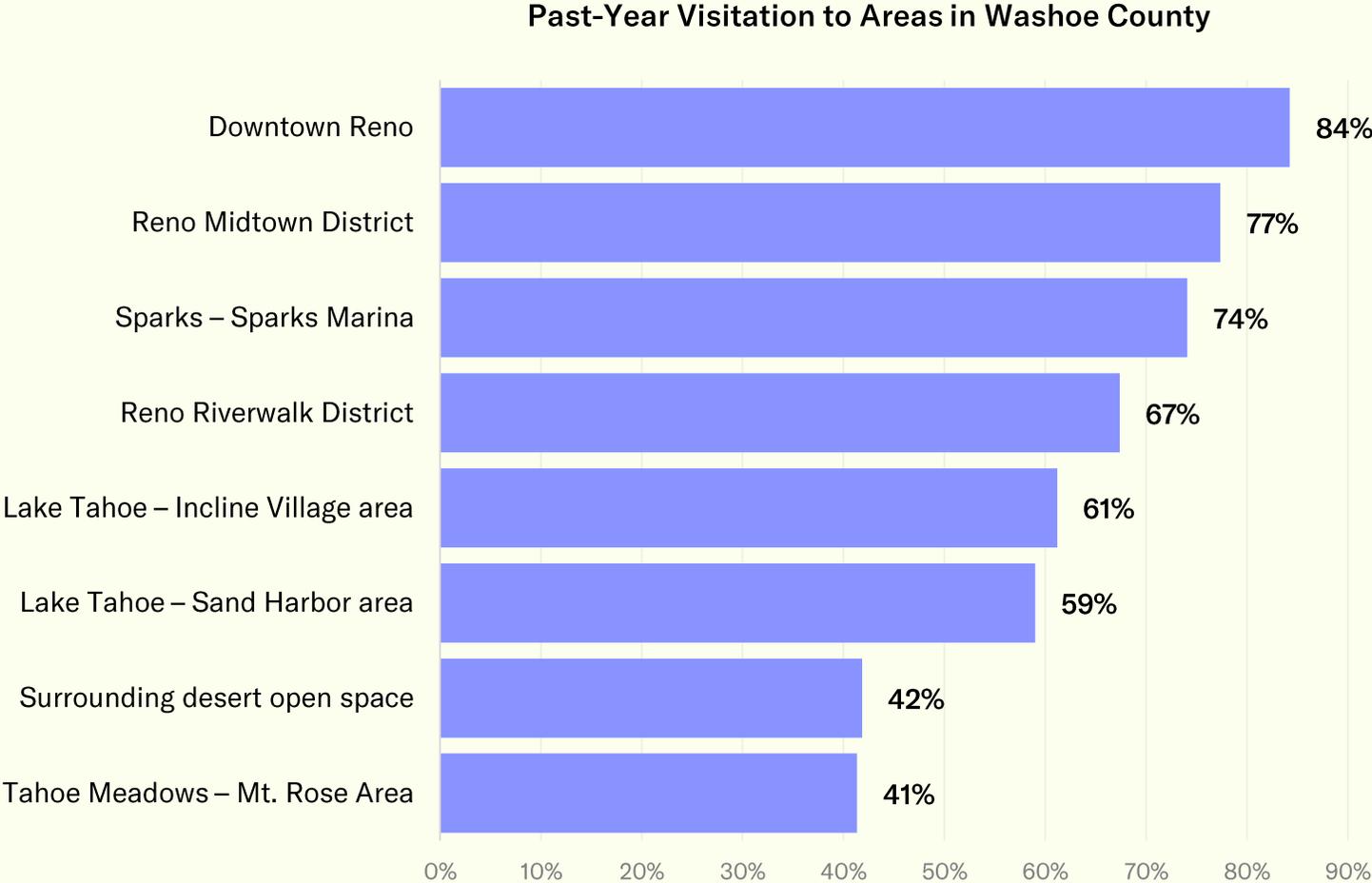


	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
Average # of day trips within Washoe County	4.3	3.3	4.6	4.5	4.4	4.5	4.3
Average # of overnight trips within Washoe County	2.8	3.0	3.5	2.8	2.1	3.3	2.7

Question: How many trips have you taken within Washoe County in the past 12 months?
 Base: Total. 476 completed surveys.

Areas Visited within Washoe County

A vast majority of Washoe County residents have been to downtown Reno in the past year (84%), while three-quarters visited Midtown (77%) and/or the Sparks Marina (74%).



Question: Did you visit any of the following areas in the past 12 months?
Base: Total. 476 completed surveys.

Areas Visited within Washoe County by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
Downtown Reno	84%	86%	94%	79%	77%	81%	85%
Reno Midtown District	77%	69%	85%	77%	74%	81%	77%
Sparks – Sparks Marina	74%	70%	80%	77%	66%	80%	73%
Reno Riverwalk District	67%	65%	83%	55%	62%	67%	67%
Lake Tahoe – Incline Village area	61%	73%	58%	59%	60%	63%	61%
Lake Tahoe – Sand Harbor area	59%	66%	62%	60%	50%	63%	58%
Surrounding desert open space	42%	29%	36%	52%	47%	45%	41%
Tahoe Meadows – Mt. Rose Area	41%	46%	43%	37%	41%	47%	40%

Question: Did you visit any of the following areas in the past 12 months? % visiting area in the past year.

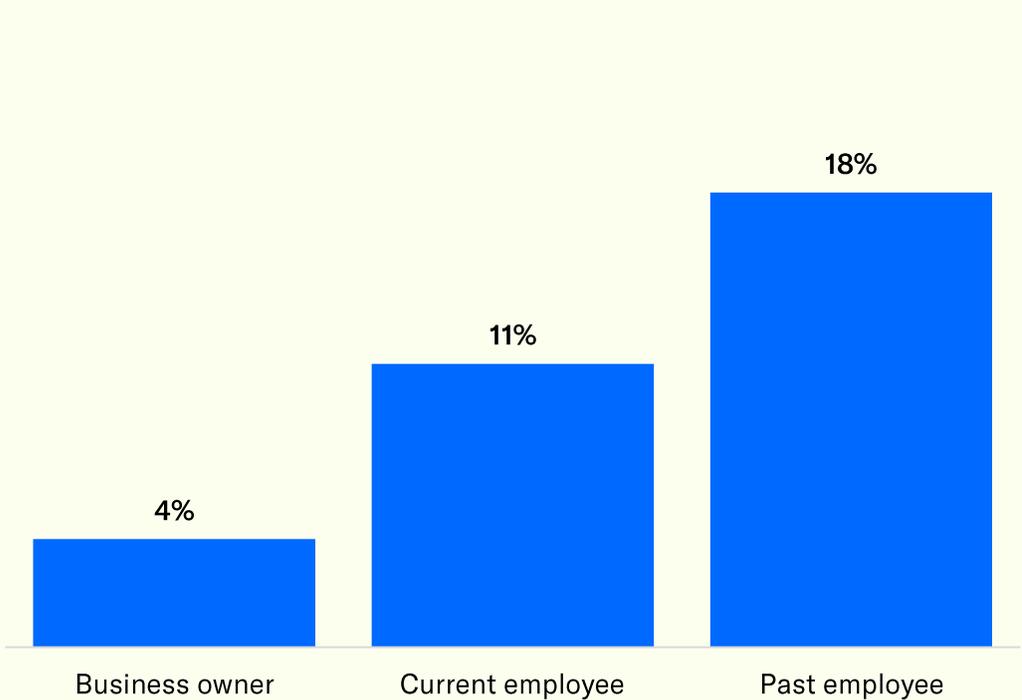
Base: Total. 476 completed surveys.

Detailed Findings: Tourism Employment

Tourism Industry Employment

Just four percent of Washoe County residents currently own a business that serves the tourism industry, while 11 percent work in a tourism-related business. An additional one in five residents have previously worked in tourism.

Washoe County Tourism Industry Employment

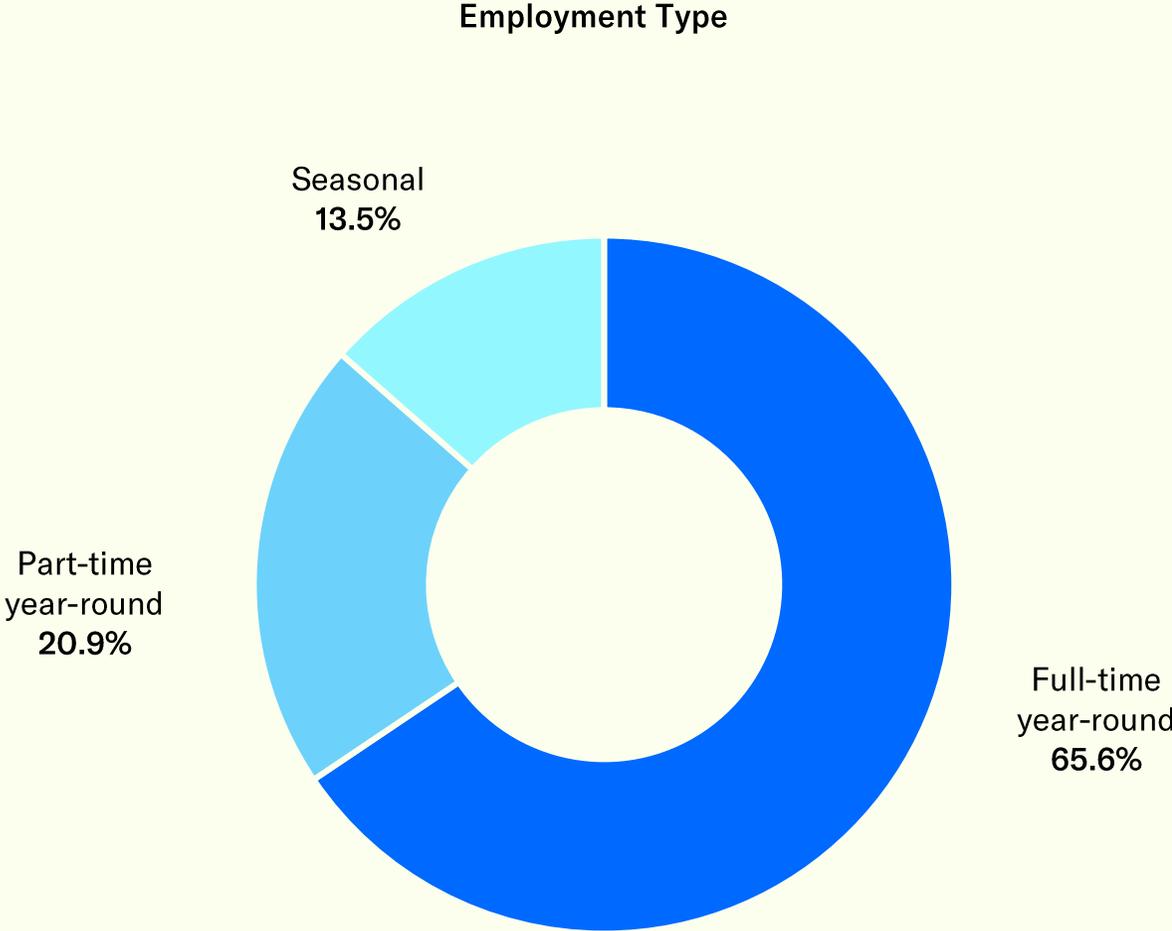


	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
Business owner	4%	7%	5%	8%	0%	29%	0%
Current employee	11%	14%	14%	9%	9%	100%	0%
Past employee	18%	13%	18%	19%	19%	-	18%

Question: Do you own a business that serves Washoe County’s tourism industry?
 Base: Total. 476 completed surveys.

Employment Type

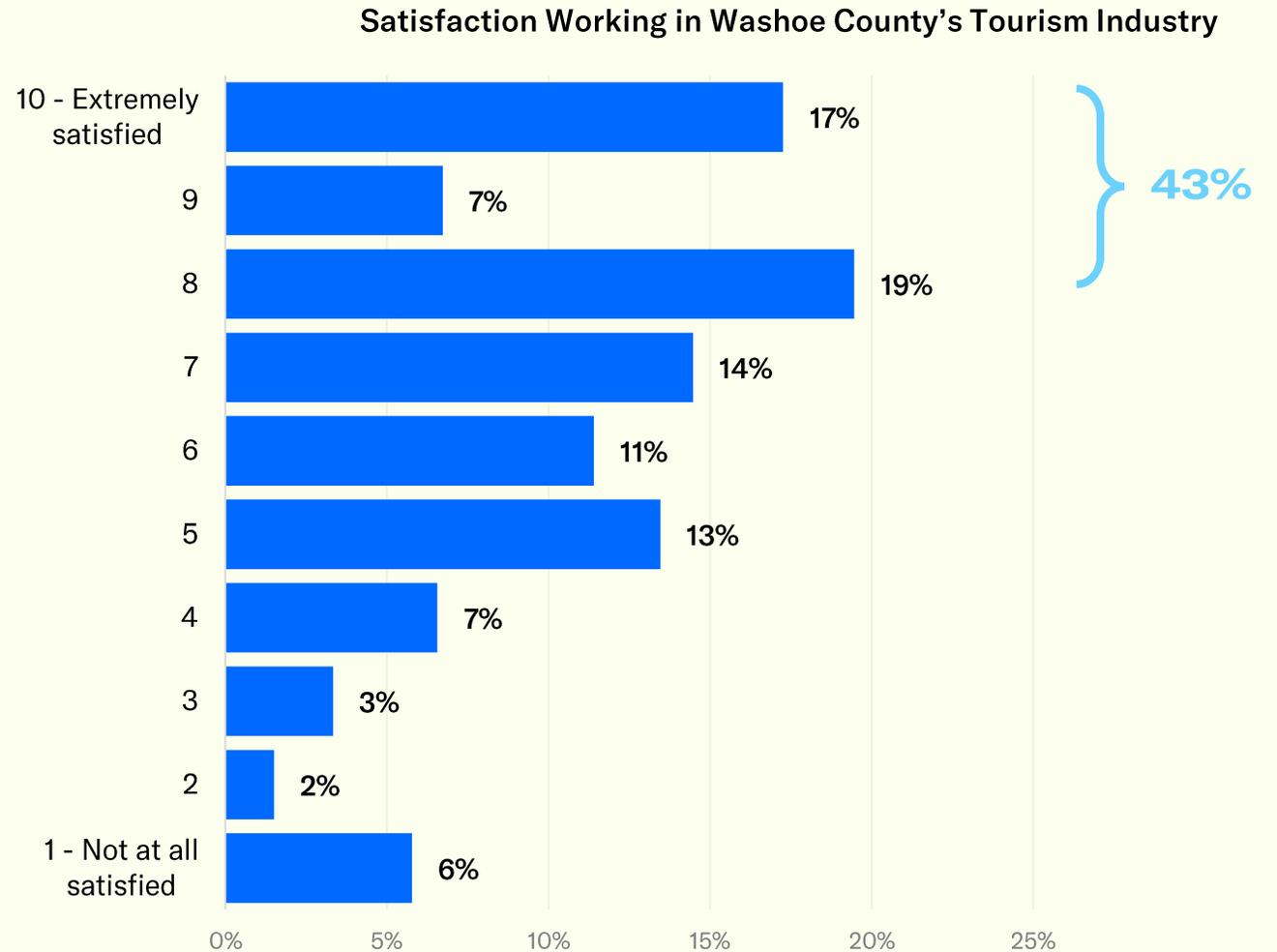
Of those who currently work in the tourism industry, two-thirds are year-round full-time employees (66%), while 21 percent are part-time and 14 percent seasonal.



Question: Are you currently employed...?
Base: Current employees. 52 completed surveys.

Satisfaction Working in Washoe County's Tourism Industry

Overall, four in ten current and past Washoe County tourism workers are highly satisfied working in the tourism industry (43%).



Question: How would you rate your overall satisfaction with working in Washoe County's tourism industry?

Base: Business owners, current employees, and past employees. 148 completed surveys.

Satisfaction Working in Washoe County’s Tourism Industry by Segment

	County	Gen Z	Millennial	Gen X	Boomers+	Tourism Employee	Not Tourism Employee
Top 3 (8 to 10)	43%	20%	41%	31%	68%	37%	50%
10 - Extremely satisfied	17%	10%	16%	18%	22%	18%	16%
9	7%	0%	3%	4%	16%	7%	7%
8	19%	10%	22%	9%	30%	12%	26%
7	14%	28%	16%	9%	11%	20%	9%
6	11%	0%	17%	19%	6%	12%	11%
5	13%	18%	13%	19%	6%	20%	7%
4	7%	13%	4%	8%	4%	8%	5%
3	3%	5%	1%	6%	2%	0%	7%
2	2%	0%	0%	3%	2%	0%	3%
1 - Not at all satisfied	6%	15%	7%	5%	0%	2%	9%
Bottom 3 box	11%	20%	9%	14%	5%	2%	19%

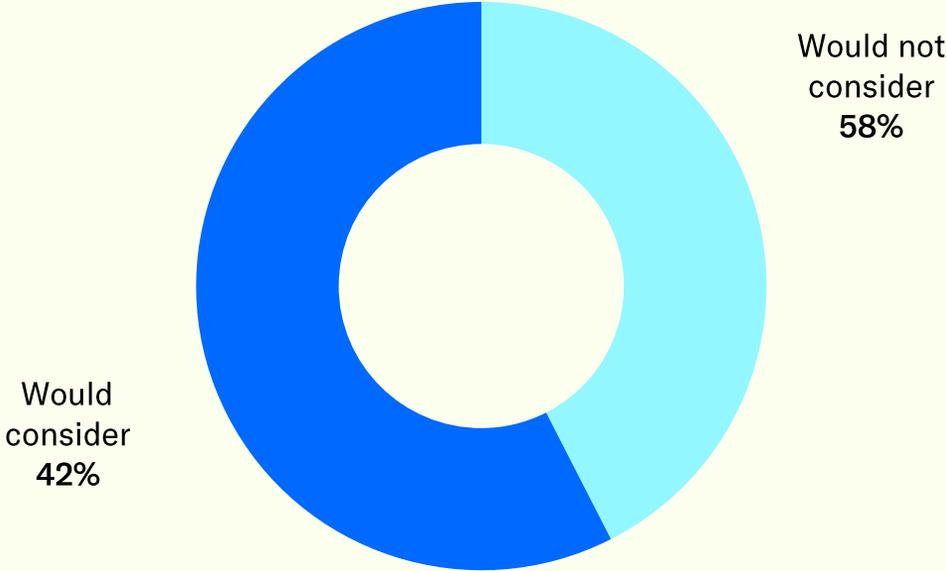
Question: How would you rate your overall satisfaction with working in Washoe County’s tourism industry?

Base: Business owners, current employees, and past employees. 148 completed surveys.

Future Employment Consideration

Of those who do not currently work in the tourism industry, four in ten would consider working in tourism in the future (42%). Looking closer at age cohorts, most Millennials (just over half, 52%) would consider working in the industry in the future.

Future Tourism Employment Consideration



	County	Gen Z	Millennial	Gen X	Boomers+
Would consider	42%	41%	52%	42%	37%
Would not consider	58%	59%	48%	58%	63%

Question: Would you ever consider working in Washoe County’s tourism industry in the future?
 Base: Not currently employed or owns business in tourism industry. 402 completed surveys.

Future Partners