



Reno-Sparks Convention & Visitors Authority Reno Tahoe 2024 Brand Health & Advertising Tracking

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Research Overview & Objectives

This report presents the findings of the Visit Reno Tahoe 2024 Brand Health and Ad Tracking Study, conducted on behalf of the Reno-Sparks Convention & Visitors Authority and its agency, BVK, by the independent tourism market research firm Future Partners.

With an overarching goal of understanding perceptions of the Reno Tahoe destination brand, as well as gauging the effectiveness and impact of the current marketing campaign, Future Partners designed this study to support the following objectives:

- Understand motivations and travel attitudes among Reno Tahoe's target audience
- Understand recent and future travel intentions
- Evaluate Reno Tahoe's brand attributes and brand health performance
- Assess Reno Tahoe's competitive position
- Gauge marketing recall and aided advertising awareness



Research Methodology

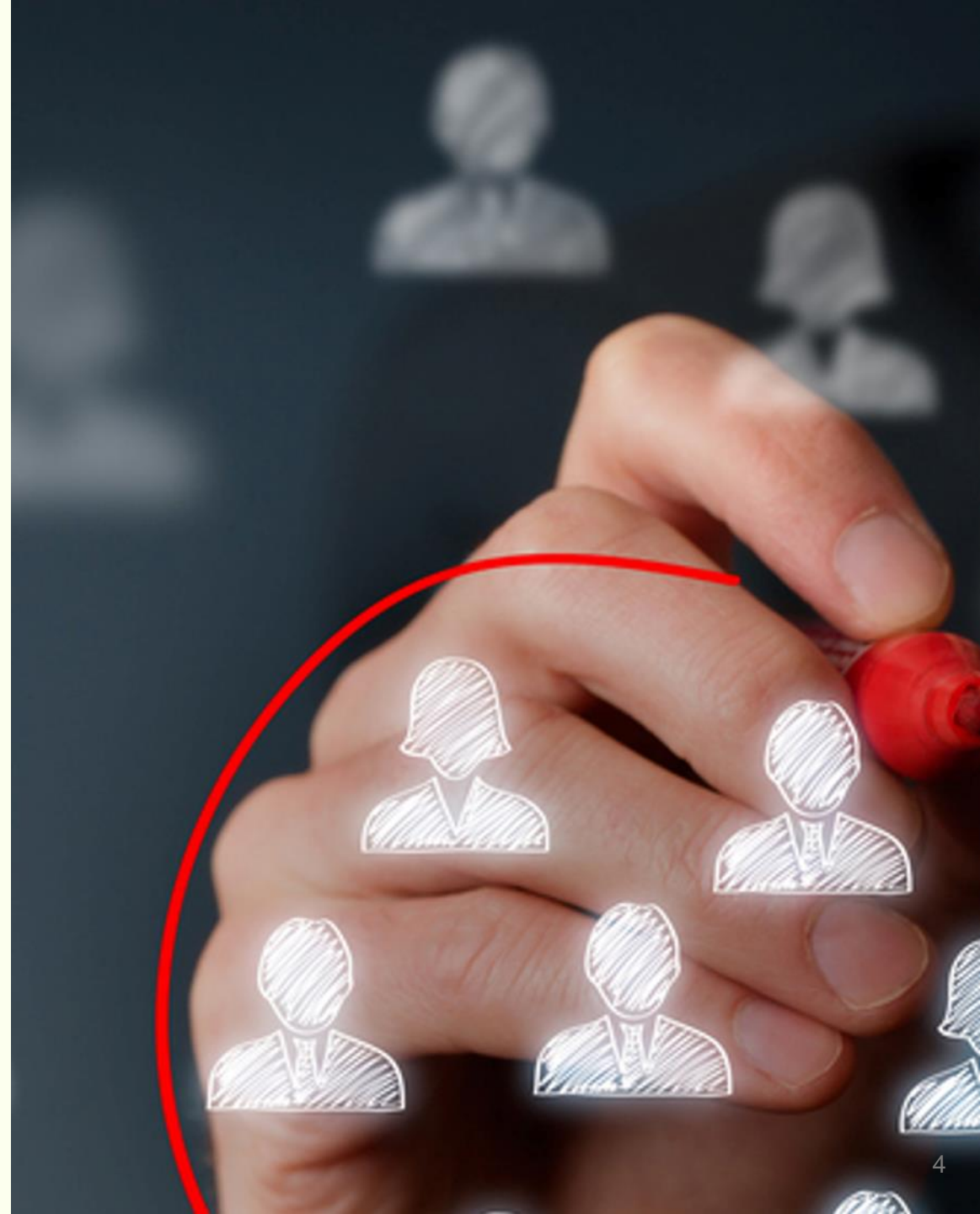
Future Partners conducted an online survey of N=1,600 target travelers who meet the following sample qualification criteria:

- Adults age 25-54
- Annual household income of \$100K+
- Travelers who typically take at least one overnight vacation per year of at least 50 miles or more away from home
- Reside in the United States:
 - Western United States
 - Texas
 - Rest of the United States

The survey was fielded through Future Partners' trusted panel provider, Prodege, with data collection ongoing from July - December 2024.

All quantitative data presented within this report is

weighted based on geographic populations of the markets studied and on gender.



About This Report

The following terms used within this report are defined as follows:

- **Target Travelers or Target Audience** - all survey respondents.
- **Target Segments or Target Marketing Segments** - the three traveler segments targeted by RSCVA's marketing: Cultured Creative, Dynamic Parents and Ambitious Adventurer
- **Cultured Creative** - target travelers who prefer experiences where they can get a sense for the culture of a place, travel for and enjoy new experiences, and are motivated to travel by the arts, exploration and personal hobbies.
- **Dynamic Parents** - target travelers who are married/partnered, have children under 18 and are college educated. They are motivated to travel by spending quality time with family, engaging in personal hobbies and feeling alive and energetic.
- **Ambitious Adventurer** - target travelers who prefer active time to down time on vacation and seek exciting, stimulating experiences while traveling.
- **IMC (Integrated Marketing Campaign)** - RSCVA's marketing that consists of paid media, earned media and owned channels.
- **Paid Aware** - target travelers who recalled ads, sponsored social media posts, billboards, and/or sponsored articles paid for by Reno-Tahoe in the past six months.



Executive Summary

While interest in visiting Reno Tahoe outpaces interest in similarly sized destinations, there's an opportunity to close the gap between interest in visiting and actual plans to visit.

- One-third of target travelers express interest in visiting Reno Tahoe in the next two years. Amongst a total competitive set of seven destinations, Reno Tahoe ranks fifth for interest in visiting in the next two years, however, the competitors that exceed Reno Tahoe represent much larger populated areas; Reno Tahoe leads among more comparably sized destinations such as Mammoth Lakes and Park City.
- While interest in visiting Reno Tahoe is at 34 percent, only 14 percent report that they plan to visit in the next 12 months. Marketing that highlights the attributes that are most important to selecting destinations—value and a welcoming atmosphere—could potentially close the 20-percentage point gap between level of interest and plans to visit.

Reno Tahoe moves the needle towards more outdoor-oriented destination attributes.

- Presented with a set list of destination attributes, target travelers were asked to rate their level of agreement with Reno Tahoe's delivery of each attribute. Target travelers associate Reno Tahoe with the outdoors, in particular convenient access and outdoor recreation. Convenient access to the outdoors (73%) and outdoor activities and recreation (71%) were Reno Tahoe's highest rated destination attributes.
- Furthermore, two-thirds agree that Reno Tahoe delivers on water access (65%), winter sports (63%) and water activities (62%).
- While outdoor activities and recreation remains a leading attribute (and was the top-rated attribute in 2023), several other outdoor and family-oriented attributes (water access, winter sports, water activities, family-friendly activities, and Instagram-worthy experiences) surpass last year's second place attribute of gambling/casinos, suggesting the broadening of the Reno Tahoe destination brand.

Reno Tahoe succeeds in communicating the destination's intended brand, especially its vibrant and fun atmosphere.

- Presented with a set list of brand attributes and statements, target travelers were asked to rate their level of agreement with each statement as a description of Reno Tahoe. The majority of target travelers—70 percent—agree or strongly agree that the statement “Has a vibrant and fun atmosphere” describes Reno Tahoe. This is closely followed by “A place where you can live life to its fullest” (65%) and “Has a spirit of independence” (64%), each agreed upon by two-thirds of all target travelers.
- About half or more describe Reno Tahoe as a place that “Celebrates individuality and the unconventional” (54%) and is a place that fuses “Sophistication and edginess” (50%).

Reno Tahoe's paid advertising campaign is effective in both depicting the destination as an enjoyable place and strengthening brand perceptions.

- Nearly all paid media aware travelers really liked the ads "somewhat" or "very much" (96%) and stated that the paid ads effectively portray Reno Tahoe as a place travelers would enjoy visiting for leisure (94%).
- In turn, after exposure to the ad campaign, perceptions of all five brand attribute statements tested improved amongst paid aware target travelers. Nine-in-ten paid aware travelers agree that the ads show Reno Tahoe as vibrant and fun (92%), has a spirit of independence (91%), and is a place to live life to its fullest (90%). Though there is relatively less agreement with individuality (87%) and the fusion of sophistication and edginess (86%), the campaign strongly portrays these attributes of Reno Tahoe, with 86 percent or more who agreed that these attributes are communicated.

Reno Tahoe's paid advertising efforts motivate positive action.









- One-in-five (21%) target travelers recalled a paid ad for Reno Tahoe. As a result, nine-in-ten of these paid aware target travelers took at least one positive action (91%).
- Amongst paid aware target travelers, about three-quarters researched Reno Tahoe after exposure to an ad (71%). Further, and importantly, one-third reported that they booked a trip after seeing an ad (32%). Other actions included adding activities to a planned trip (45%) and/or lengthening a planned stay (25%).

Exposure to Reno Tahoe's paid ad campaign correlates to higher levels of interest and intended visitation.









- Nearly half of paid ad aware travelers reported interest in visiting Reno Tahoe in the next two years (48%), compared to 30 percent for paid unaware travelers.
- Similar to the higher level of interest, paid aware target travelers are significantly more likely to have a trip planned to Reno Tahoe in the next year. More than twice as many paid aware travelers than paid unaware travelers reported that they are planning to visit Reno Tahoe in the next 12 months (26% vs. 11%).

Target Audience Profile

Target Audience Demographic Profile

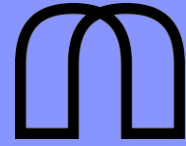
<div></div> <div>Gender Identity</div> <div><div>Female (50%)</div><div>Male (50%)</div></div>	<div></div> <div>Average Age</div> <div>42.1 years</div>	<div></div> <div>Ethnic Background</div> <div><div>White/Caucasian (79%)</div><div>Asian (12%)</div><div>Hispanic/Latino (10%)</div><div>Black/African American (6%)</div></div>	<div></div> <div>Employed Full-Time</div> <div>81%</div>
<div></div> <div>Marital Status</div> <div><div>Married/Partnered (79%)</div><div>Single (16%)</div></div>	<div></div> <div>Has Children Under 18</div> <div>61%</div>	<div></div> <div>Bachelor's Degree or Higher</div> <div>80%</div>	<div></div> <div>Household Income</div> <div>\$154,292</div>

Target Audience Travel Behaviors

 <div>Visited Reno Tahoe as An Adult</div> <div>26%</div>	 <div>Interested in Visiting Reno Tahoe in the Next 2 Years</div> <div>34%</div>	 <div>Plans to Visit Reno Tahoe in the Next 12 Months</div> <div>14%</div>	 <div>Top Travel Motivators</div> <div>Take a break from everyday life (86%)</div> <div>Spend more quality time with family (81%)</div>
 <div>Top Attributes Important to Destination Selection</div> <div>Good value for money (75%)</div> <div>Inclusive/welcoming atmosphere (70%)</div>	 <div>Media Consumed Daily</div> <div>Social media (81%)</div> <div>Video content on TV/movie streaming platforms (63%)</div>	 <div>Social Media Typically Used</div> <div>Facebook (86%)</div> <div>YouTube (77%)</div> <div>Instagram (73%)</div>	 <div>Travel Inspiration Sources</div> <div>Online searches (49%)</div> <div>Friends/family via direct contact (46%)</div> <div>Social media (40%)</div>



Reno Tahoe Brand Health

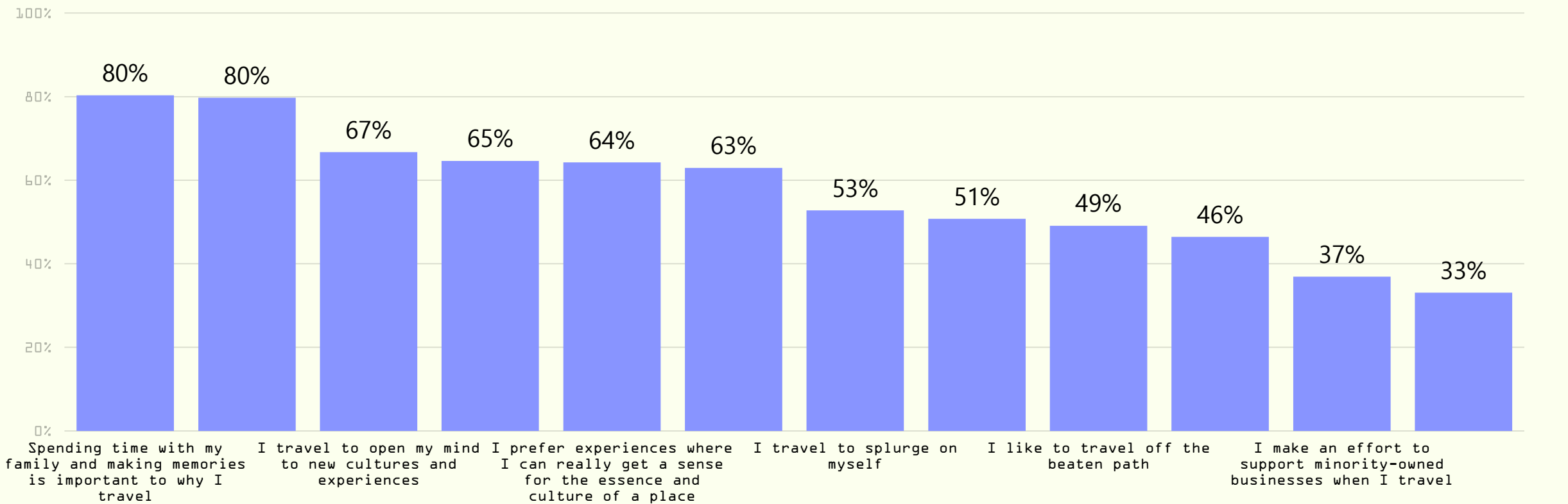


Detailed Findings: Travel Decision Motivators

Spending time with family and trying new things are the top attitudes amongst target travelers.

At least four-in-five target travelers agree that making memories while traveling and having new experiences describe them. Two-in-three agree that they travel to expose themselves to new cultures/experiences (66.7%), enjoy exciting travel experiences (64.6%), prefer experiences in which they can truly get a sense of the place (64.3%), and that being in nature motivates them to travel (62.9%). As in 2023, the target audience surveyed seeks to broaden their day-to-day experiences while valuing cherished family moments.

Traveler Psychographics
(Top 2 Box Agreement - % selecting "4" or "5 - Describes me perfectly")

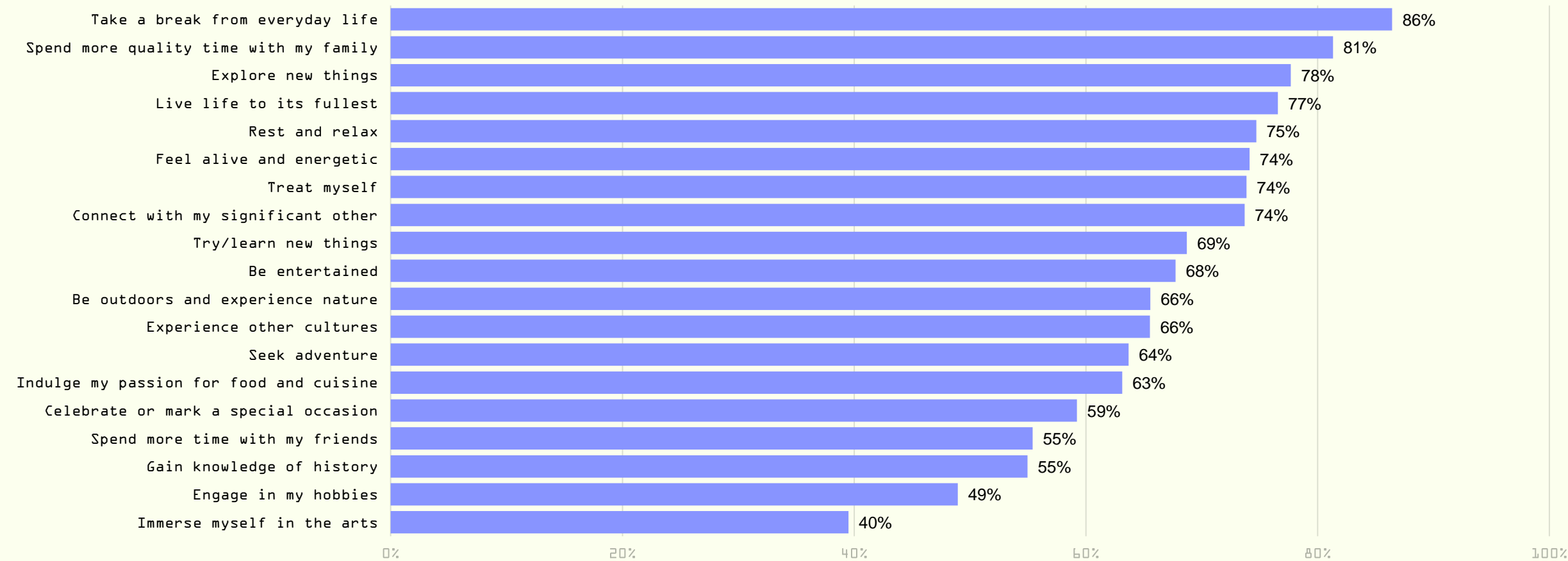


Common motivators for traveling are to take a break from daily life and spend quality time with family.

Meanwhile, three-quarters of target audience travelers are motivated to travel to explore new things (78%), live life to its fullest (77%), rest/relax (75%), feel alive/energetic (74%), treat themselves (74%), and/or to connect with their significant other (74%).

Travel Motivators

(Top 2 Box Agreement - % selecting "4" or "5 - Describes me perfectly")

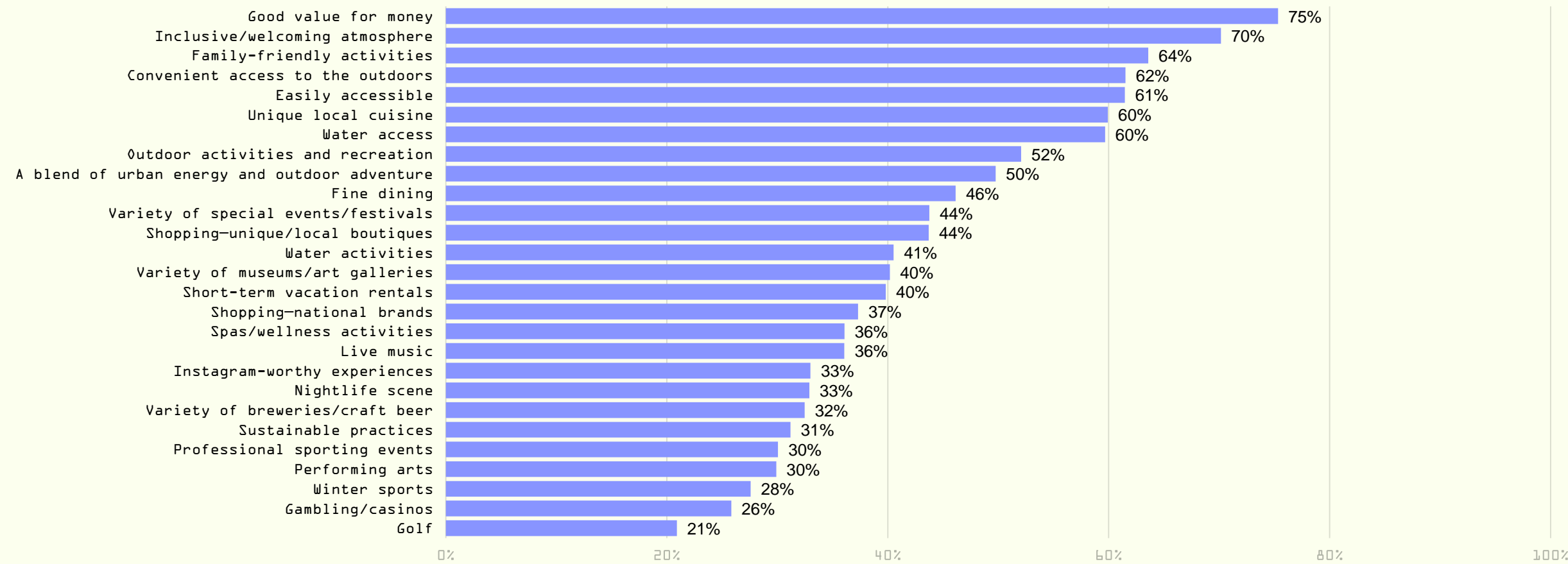


Good value and a welcoming atmosphere are the most important attributes in selecting leisure destinations.

Approximately two-in-three target travelers report that family-friendly activities (64%), convenient access to the outdoors (62%), ease of access (61%), local food (60%), and water access (60%) are “important” or “very important” to when they select a vacation destination. On the other hand, golf (21%), gaming (26%), and winter sports (28%) are relatively less important attributes in destination selection.

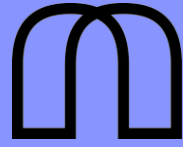
Attribute Importance in Destination Selection

(Top 2 Box Importance - % selecting "Important" or "Very important")



Question: How important are the following to you when selecting a vacation destination?

Base: Total respondents 2024. 1,600 completed surveys.

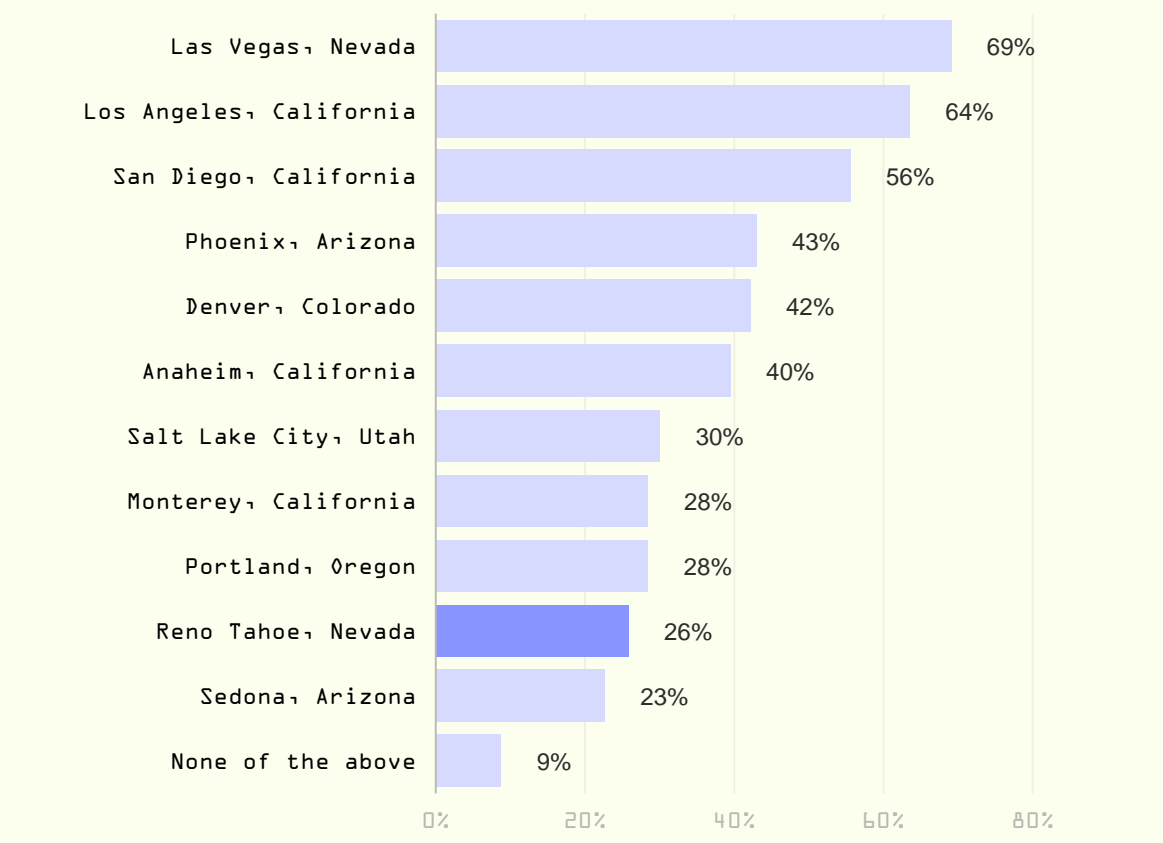


Detailed Findings: Reno Tahoe's Competitive Situation

Over one-quarter of target travelers have visited Reno Tahoe as an adult.

Las Vegas ranks as the leading competitor (69%), followed by Los Angeles (64%) and San Diego (56%) in California. Amongst the target marketing segments, past visitation to Reno Tahoe as an adult is slightly higher than the average target traveler: Cultured Creative (28%), Dynamic Parents (26%), and Ambitious Adventurer (28%).

Destinations Visited as Adult



Detail by Target Segments

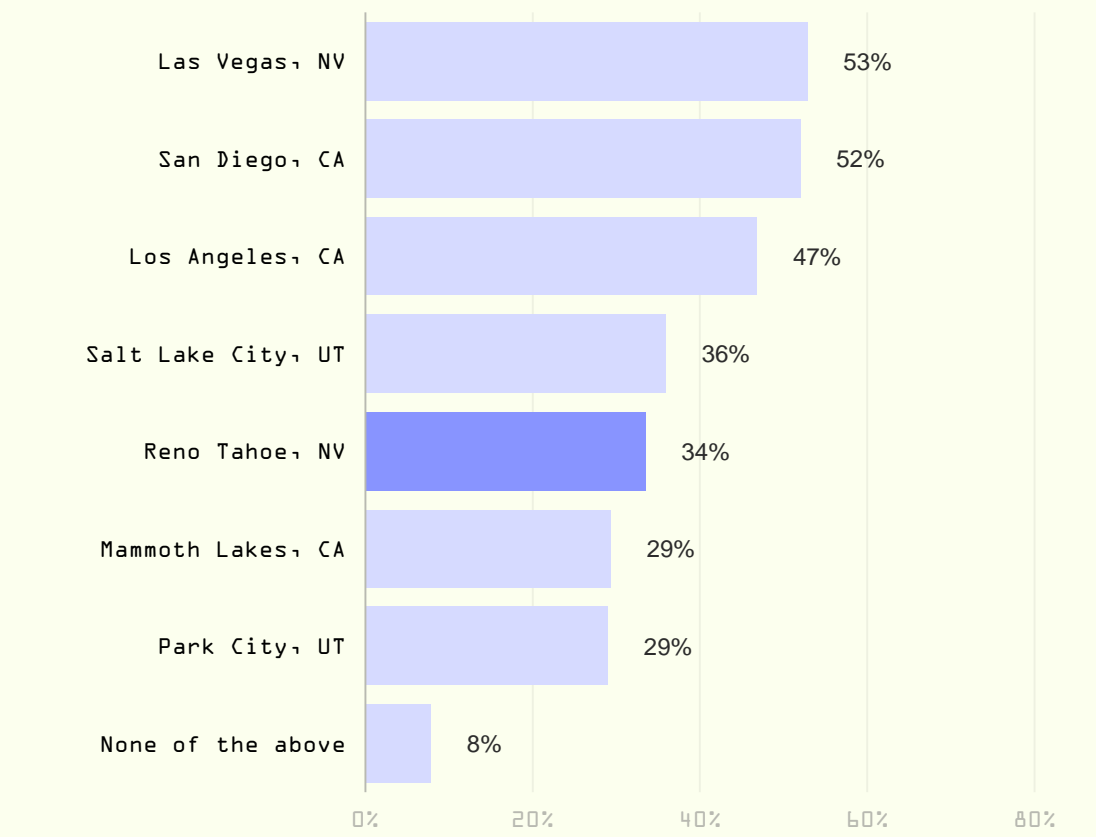
	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Las Vegas, Nevada	69%	67%	67%	69%
Los Angeles, California	64%	74%	79%	71%
San Diego, California	56%	63%	63%	63%
Phoenix, Arizona	43%	46%	45%	49%
Denver, Colorado	42%	48%	47%	48%
Anaheim, California	40%	36%	40%	42%
Salt Lake City, Utah	30%	36%	40%	40%
Monterey, California	28%	36%	42%	38%
Portland, Oregon	28%	28%	26%	33%
Reno Tahoe, Nevada	26%	28%	26%	28%
Sedona, Arizona	23%	22%	24%	26%
None of the above	9%	3%	1%	2%
Base	1,600	273	270	227

Question: Which of the following destinations have you visited as an adult (that is, after age 18)? Select all that apply.
Base: 2024 respondents who completed surveys.

One-third of target travelers express interest in visiting Reno Tahoe in the next two years.

Amongst a total competitive set of seven destinations, Reno Tahoe ranks fifth for interest in visiting in the next two years. However, eagerness to visit increases to significantly above average for each target segment, led by Ambitious Adventurers (46%), followed by Dynamic Parents (45%) and Cultured Creatives (42%). In addition, the competitors that exceed Reno Tahoe represent much larger populated areas; Reno Tahoe leads among more comparably sized destinations such as Mammoth Lakes and Park City.

Destinations Interested in Visiting in the Next Two Years



Detail by Target Segments

	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Las Vegas, NV	53%	68%	64%	64%
San Diego, CA	52%	66%	64%	65%
Los Angeles, CA	47%	66%	64%	66%
Salt Lake City, UT	36%	55%	53%	61%
Reno Tahoe, NV	34%	42%	45%	46%
Mammoth Lakes, CA	29%	44%	49%	50%
Park City, UT	29%	44%	47%	45%
None of the above	8%	1%	1%	0%

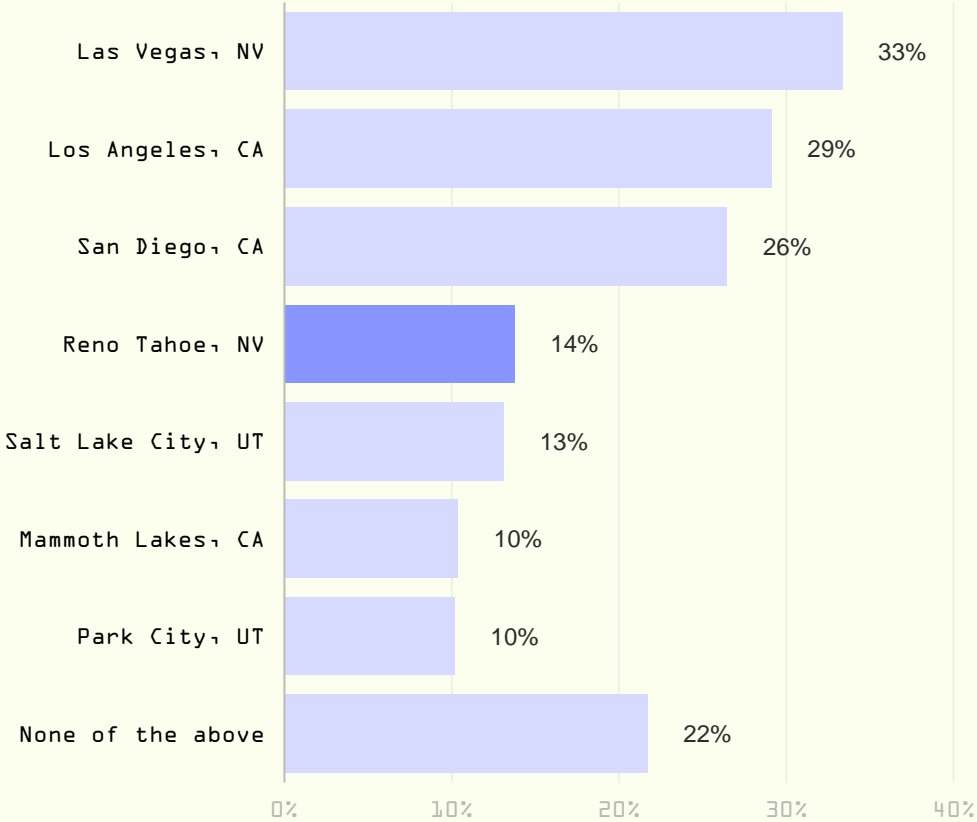
Base	1,600	273	270	227
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Question: Which of the following destinations are you interested in visiting in the next two years? Select all that apply.
Base: 2024 respondents, 1,600 completed surveys.

About 15 percent of target travelers intend to visit Reno Tahoe in the next year, suggesting an opportunity to convert interested travelers into actual visitors.

While interest in visiting Reno Tahoe is at 34 percent, only 14 percent report that they plan to visit in the next 12 months. Marketing that highlights the attributes that are most important to selecting destinations—value and a welcoming atmosphere—could potentially close the 20-percentage point gap between level of interest and plans to visit.

Destinations Planning to Visit in the Next 12 Months



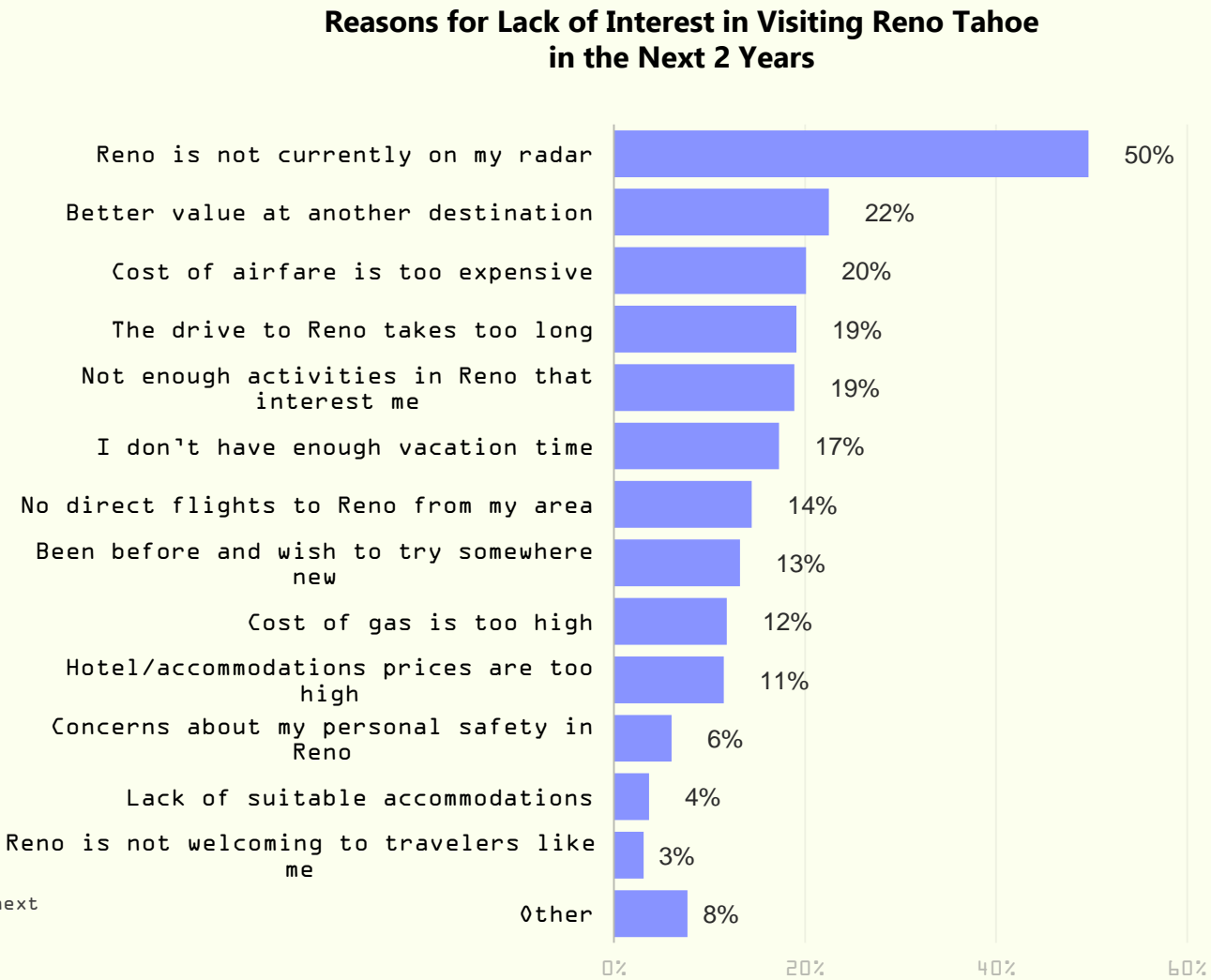
Detail by Target Segments

	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Las Vegas, NV	33%	52%	47%	49%
Los Angeles, CA	29%	52%	50%	53%
San Diego, CA	26%	49%	47%	53%
Reno Tahoe, NV	14%	23%	26%	28%
Salt Lake City, UT	13%	31%	30%	35%
Mammoth Lakes, CA	10%	27%	24%	29%
Park City, UT	10%	25%	26%	25%
None of the above	22%	3%	3%	3%
Base	1,600	273	270	227

Question: Which of the following destinations are you planning to visit in the next 12 months? Select all that apply. BASE: 2024 Respondents: 1,600 completed surveys.

Amongst those who reported that they are not interested in visiting Reno Tahoe in the next two years, the top reason is that the destination is simply not on their radar.

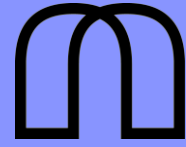
This suggests an opportunity to educate travelers about Reno Tahoe’s assets to potentially get the destination on their radar. Other reasons for the lack of interest in visiting Reno Tahoe in the next two years include better value in other destinations (22%), airfare is too expensive (20%), the drive is too long (19%) and the lack of activities that are interesting to these travelers (19%), each selected by approximately one-in-five travelers.



Question: Earlier you said you were not interested in visiting Reno Tahoe in the next 24 months. What are the reasons for not considering a trip to Reno Tahoe at this time?

Base: Target audience not interested in visiting Reno Tahoe in the next two years.

2,016 completed surveys.



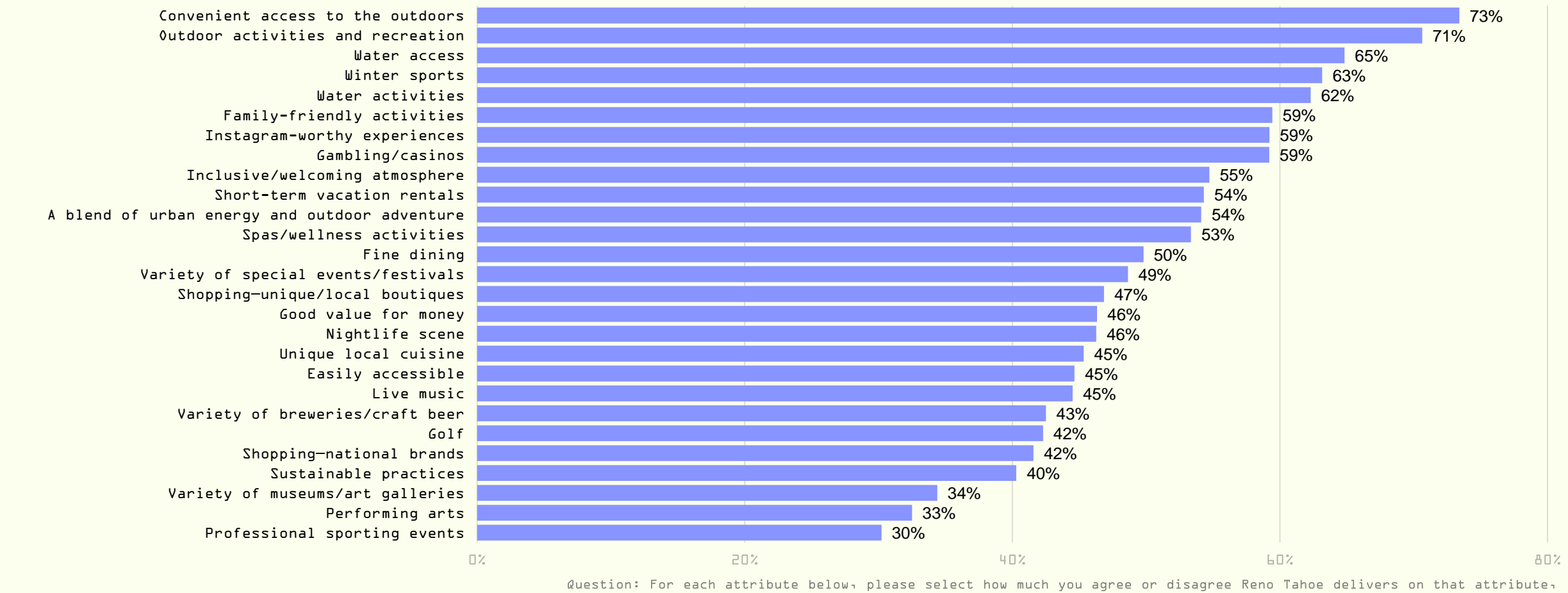
Detailed Findings: Perceptions of Reno Tahoe

Target travelers associate Reno Tahoe with the outdoors, in particular convenient access and outdoor recreation.

Furthermore, two-thirds agree that Reno Tahoe delivers on water access (65%), winter sports (63%) and water activities (62%). In total, 59 percent agree that the destination delivers on gambling/casinos.

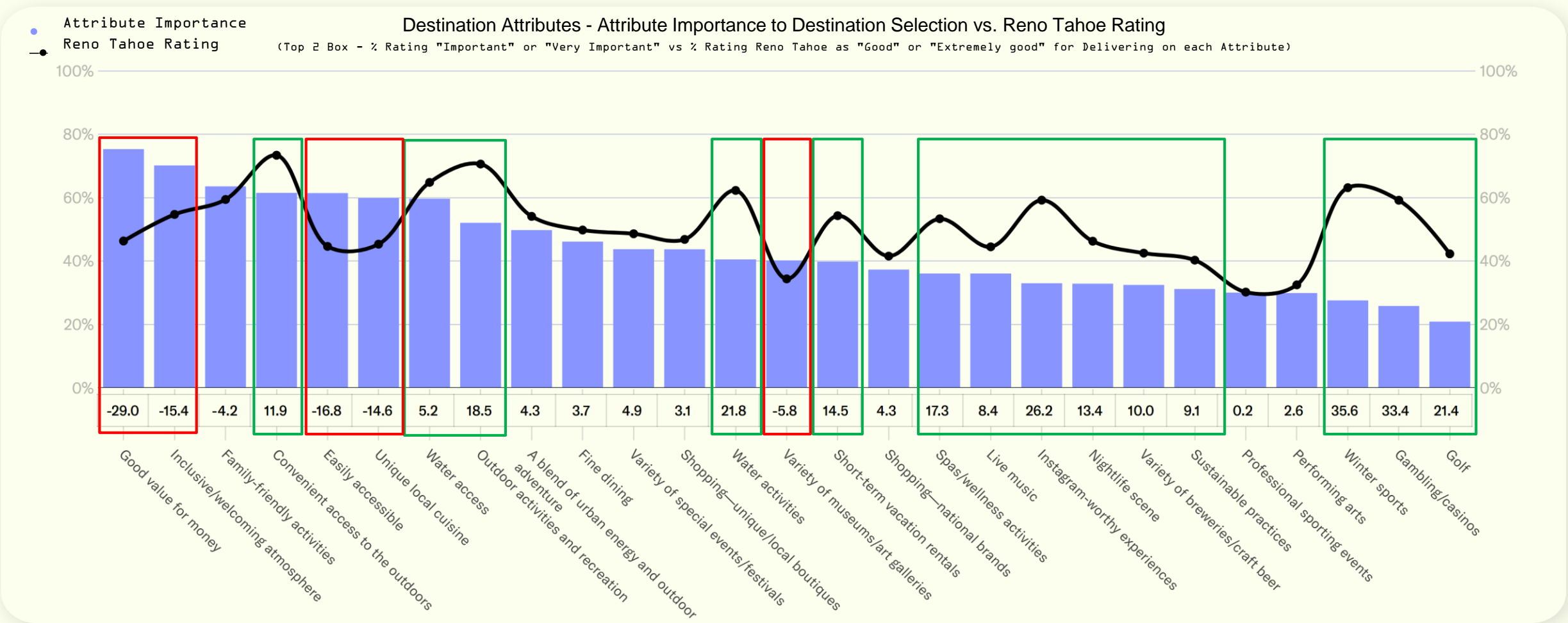
Reno Tahoe Destination Attribute Rating

(Top 2 Box Agreement - % selecting "Agree" or "Strongly agree")



Although Reno Tahoe underperforms for the attributes that are most important to destination selection—value for money and a welcoming atmosphere—the destination performs well for many other attributes.

The chart below maps the percent of leisure travelers who rate each attribute as “Important” or “Very important” in planning an overnight leisure trip (vertical bars) against the percent who rate each attribute as “Very good” or “Excellent” for Reno Tahoe (black line). Reno Tahoe excels on many attributes, such as convenient access to outdoors, water access, outdoor activities/recreation, water activities and short-term vacation rentals (green boxes). Reno Tahoe performs on par for eight attributes (within 5 percentage points) for family-friendly, a blend of urban and outdoors, fine dining, events/festivals, unique shopping, national brand shopping, pro sports, and performing arts. Meanwhile Reno Tahoe underperforms on value, inclusive/welcoming, accessibility, unique cuisine, and museums/art galleries (red boxes).

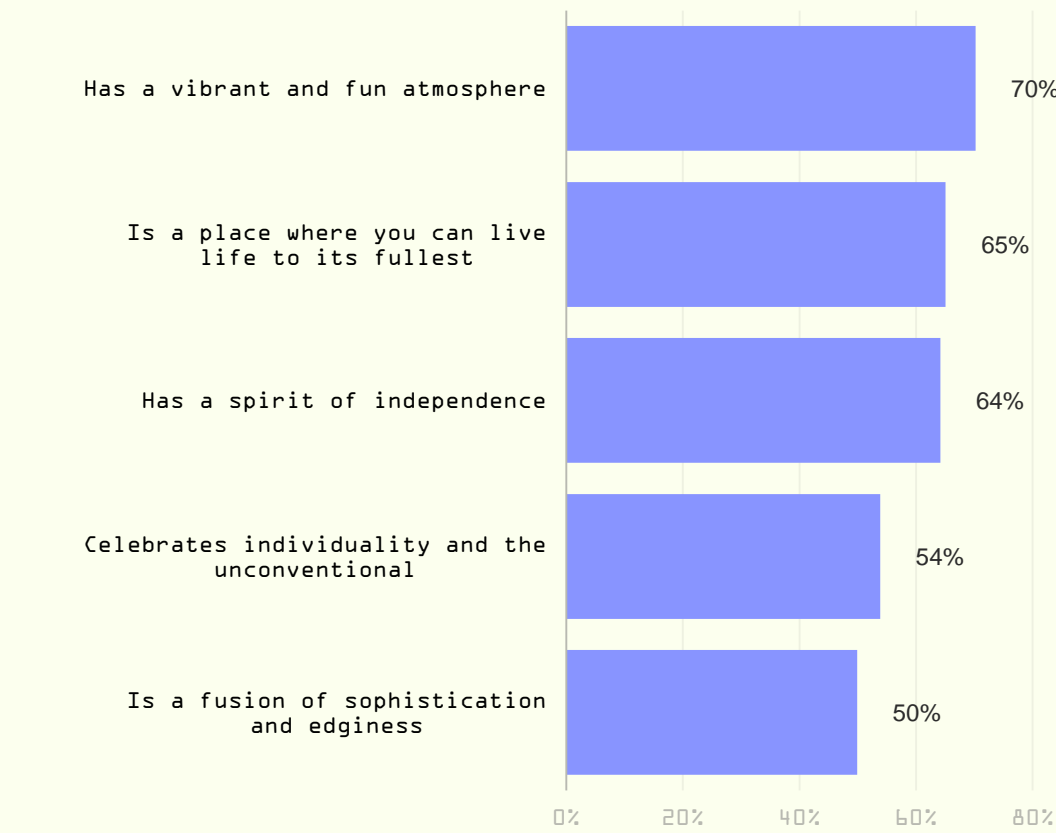


Reno Tahoe’s “vibrant and fun atmosphere” resonates with the majority of target travelers.

A majority also agree that Reno Tahoe is a place where you can live life to its fullest (65%) and has a spirit of independence (64%). About half or more describe Reno Tahoe as a place that celebrates individuality (54%) and is a place that fuses sophistication and edginess (50%).

Brand Descriptor Ratings

(Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")

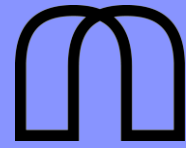


Detail by Target Segments

	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Has a vibrant and fun atmosphere	70%	89%	89%	88%
Is a place where you can live life to its fullest	65%	91%	88%	93%
Has a spirit of independence	64%	92%	89%	89%
Celebrates individuality and the unconventional	54%	86%	84%	90%
Is a fusion of sophistication and edginess	50%	83%	83%	83%
Base	1,600	273	270	227

Question: For each option below, please select how much you agree or disagree that it describes Reno Tahoe, whether you have been before or not.

Base: 2024 respondents. 1,600 completed surveys.

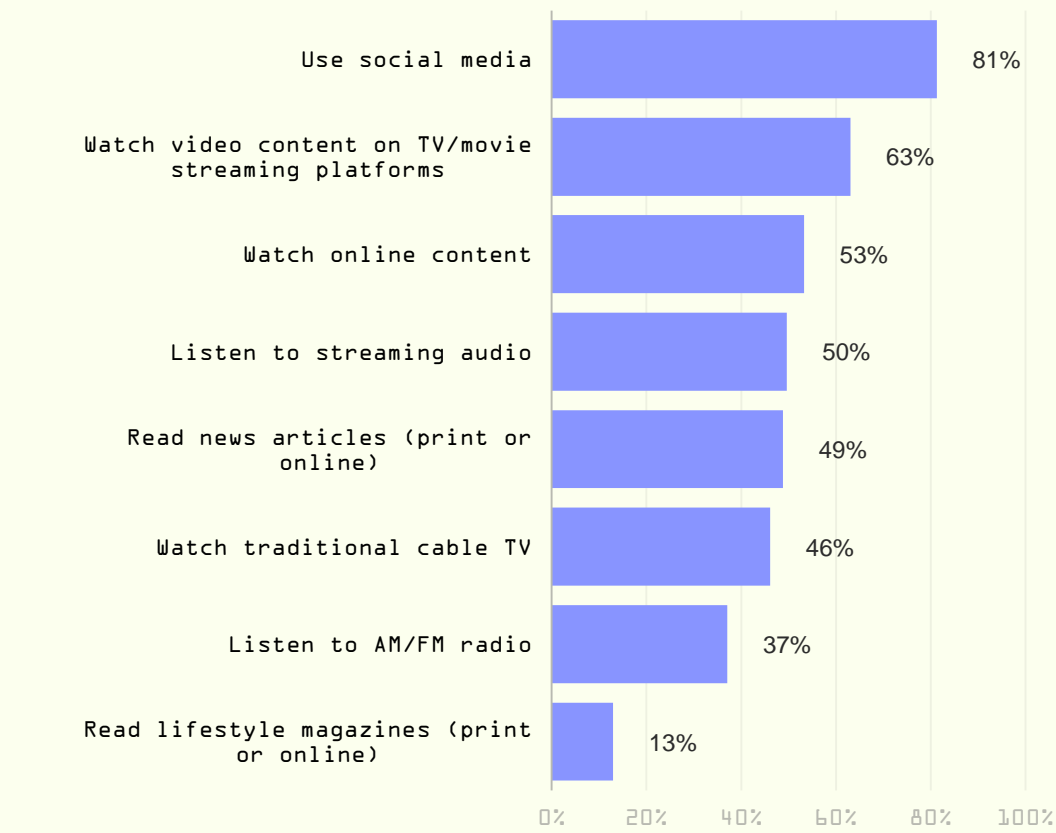


Detailed Findings: Reaching Reno Tahoe's Target Audience

The target traveler audience consumes social media and video content via streaming platforms daily.

Approximately half of target travelers view online content (53%), listen to streaming radio (50%), read news (49%) and/or watch traditional cable (46%) on a daily basis. Cultured Creatives, Dynamic Parents and Ambitious Adventurers are significantly more likely than the average traveler surveyed to consume the tested media sources daily. Of these target segments, Cultured Creatives tend to consume media more than the other two segments.

Daily Media Consumption



Detail by Target Segments

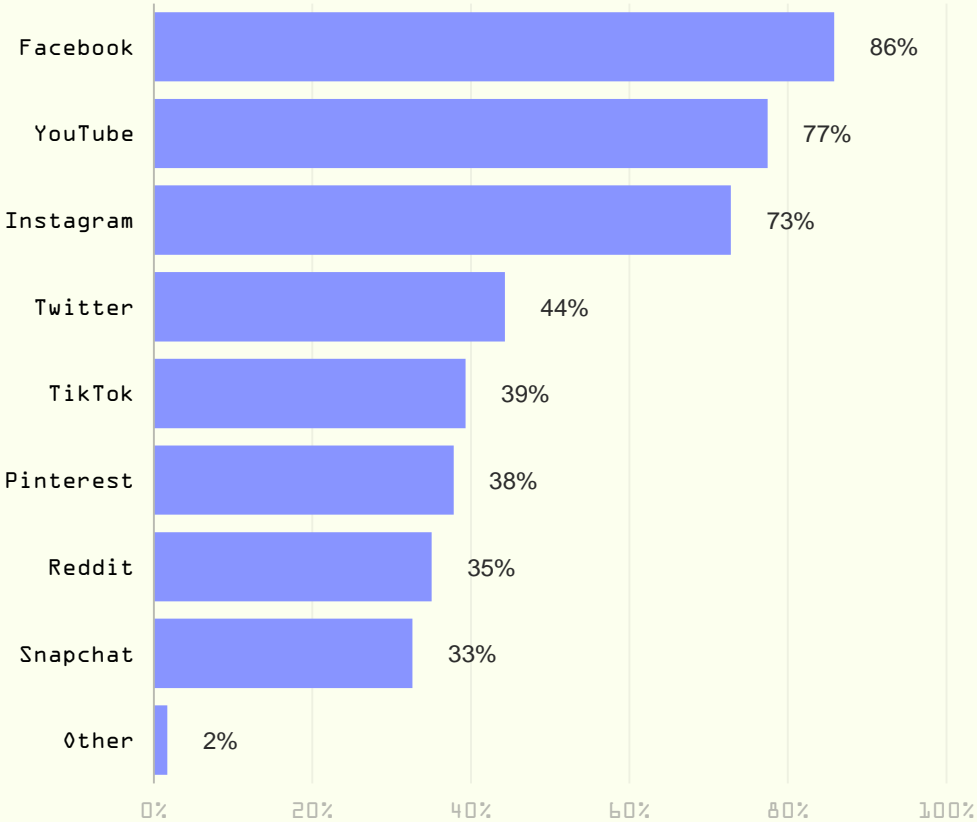
	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Use social media	81%	91%	87%	90%
Watch video content on TV/movie streaming platforms	63%	79%	75%	77%
Watch online content	53%	82%	74%	77%
Listen to streaming audio	50%	73%	68%	70%
Read news articles (print or online)	49%	58%	52%	53%
Watch traditional cable TV	46%	75%	70%	71%
Listen to AM/FM radio	37%	52%	44%	49%
Read lifestyle magazines (print or online)	13%	40%	33%	40%
Base	1,600	273	270	227

Question: How often do you...?
Base: 2024 respondents. 1,600 completed surveys.

Facebook, YouTube and Instagram are the top social media platforms typically used amongst target travelers.

Three-quarters or more cited usage of these social platforms. Meanwhile, about 45 percent typically use Twitter and 40 percent use TikTok. As the trend that has been seen so far, target segments are significantly more likely to use social, with Cultured Creatives being the most likely.

Social Media Platform Usage



Detail by Target Segments

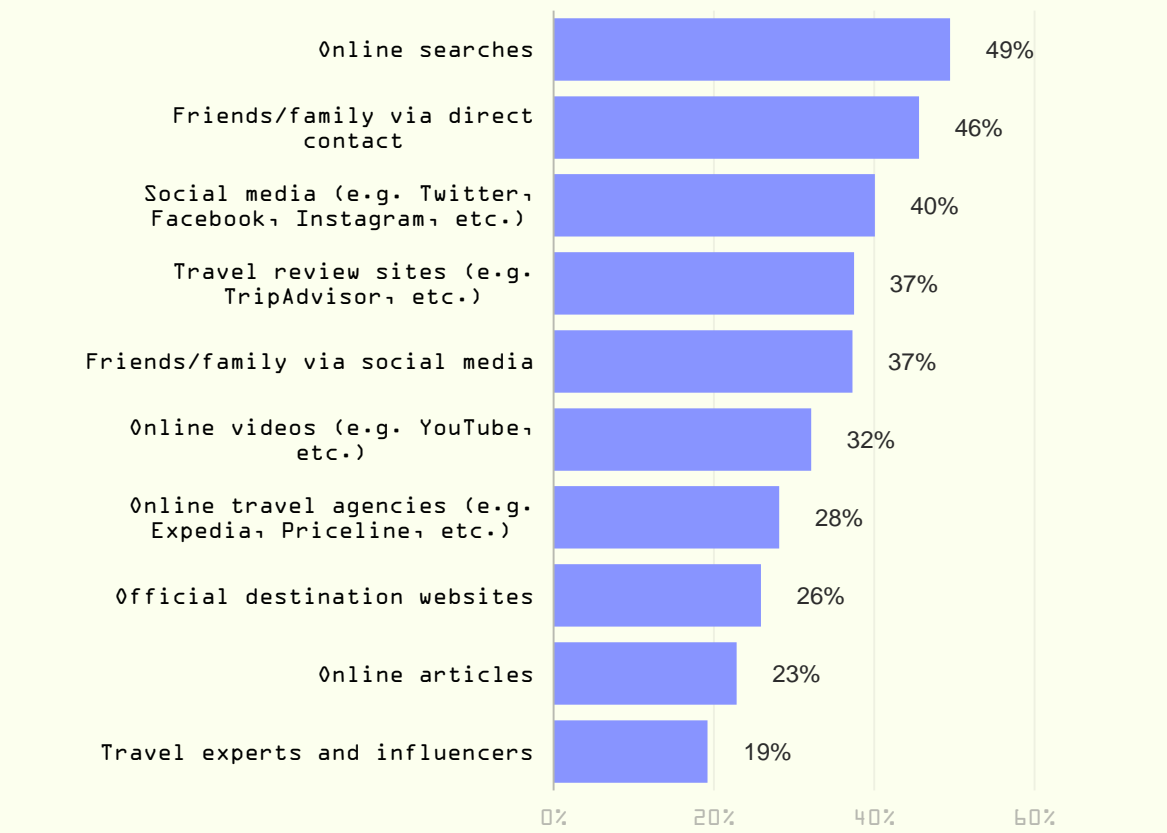
	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Facebook	86%	91%	90%	87%
YouTube	77%	95%	93%	90%
Instagram	73%	92%	93%	88%
Twitter	44%	76%	75%	73%
TikTok	39%	65%	62%	66%
Pinterest	38%	48%	53%	51%
Reddit	35%	47%	51%	49%
Snapchat	33%	62%	61%	59%
Other	2%	0%	1%	1%
Base	1,540	270	268	226

Question: Which social media platforms do you typically use? Select all that apply.
Base: 2024 social media users. 1,540 completed surveys.

Online searches and word-of-mouth through direct contact are the top sources of travel inspiration.

One-in-four typically use official destination websites to choose a vacation destination (26%). In general, all target segments are more likely to use the tested travel inspiration sources compared to the average traveler surveyed. Of the target segments, Cultured Creatives are the most likely to turn to word-of-mouth from friends/family on social media (40%) and least likely to access official destination websites for travel inspiration (27%), though still higher than the average target traveler surveyed.

Top 10 Travel Inspiration Sources



Detail by Target Segments

	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Online searches	49%	53%	52%	49%
Friends/family via direct contact	46%	37%	35%	31%
Social media (e.g. Twitter, Facebook, Instagram, etc.)	40%	54%	52%	53%
Travel review sites (e.g. TripAdvisor, etc.)	37%	44%	49%	46%
Friends/family via social media	37%	40%	37%	35%
Online videos (e.g. YouTube, etc.)	32%	47%	47%	43%
Online travel agencies (e.g. Expedia, Priceline, etc.)	28%	41%	41%	41%
Official destination websites	26%	27%	32%	32%
Online articles	23%	28%	26%	26%
Travel experts and influencers	19%	34%	35%	35%
Base	1,600	273	270	227

Question: Where do you look for travel inspiration? That is, what sources do you typically use for choosing a vacation destination? Select all that apply.

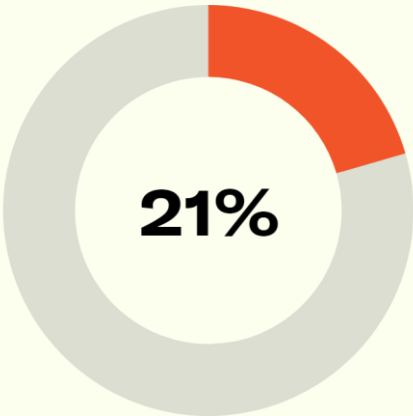
Base: 2024 respondents. 1,600 completed surveys.



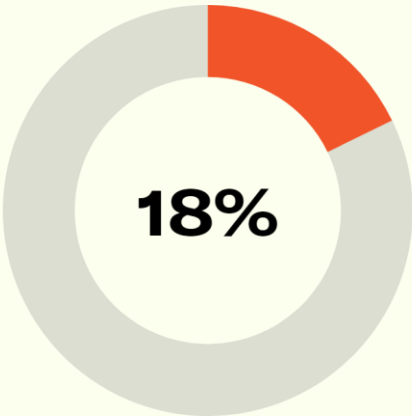
Advertising Tracking

Snapshot of Media Recall

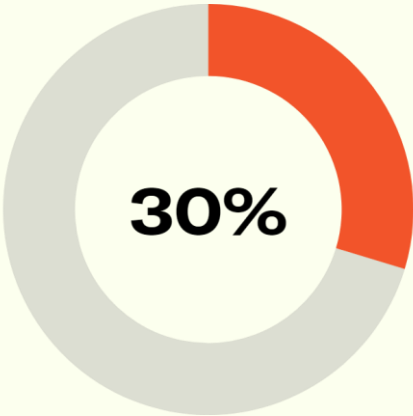
Advertising Recall (Past 12 Months)



Earned Recall (Past 12 Months)

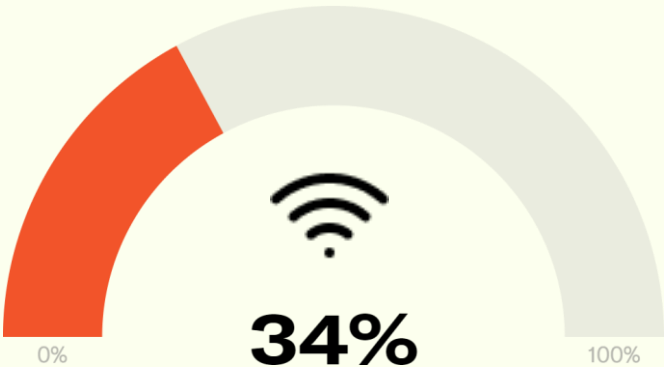
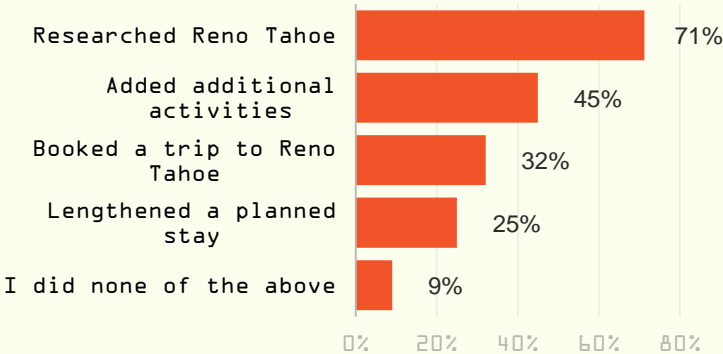


Owned Recall (Past 12 Months)



Actions Taken Due to Advertisement Awareness

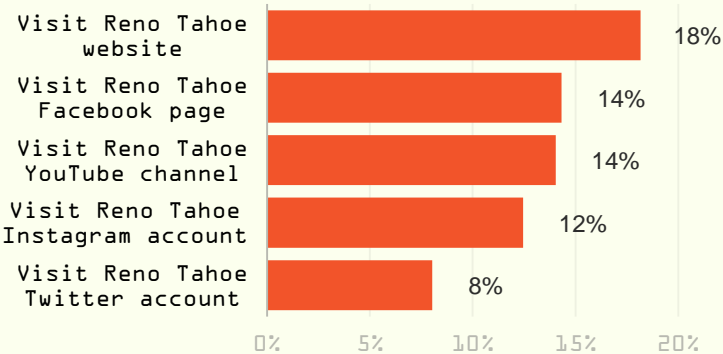
(% Selecting "Yes" to Recalling Reno Tahoe Advertisements)



(% Recalling Paid, Earned or Owned Recall for Reno Tahoe)

Owned Recall Channels

(% Reporting Using Reno Tahoe's Owned Channels)



Snapshot of Media Recall

- Overall, one-in-five target travelers recalls seeing a paid media ad for Reno Tahoe in the past six months (21%).
- About one-in-five target travelers also recall news stories, articles or blogs about travel to Reno Tahoe in the past year (18%).
- About a third of target travelers have visited at least one of Visit Reno Tahoe's owned channels in the past year (30%).
- The vast majority of paid aware travelers took a positive action after exposure to a Reno Tahoe ad (91.0%). About three-quarters of paid aware travelers researched Reno Tahoe after exposure to an ad (71%). Further, and importantly, one-third reported that they booked a trip after seeing an ad (32%). Other actions included adding activities to a planned trip (45%) and/or lengthening a planned stay (25%).
- **A third of target travelers (34%) are identified as IMC (Integrated Marketing Campaign) Aware, having recalled paid, earned and/or owned Reno Tahoe marketing.**
- The official Visit Reno Tahoe website is the most visited owned channel (18%).



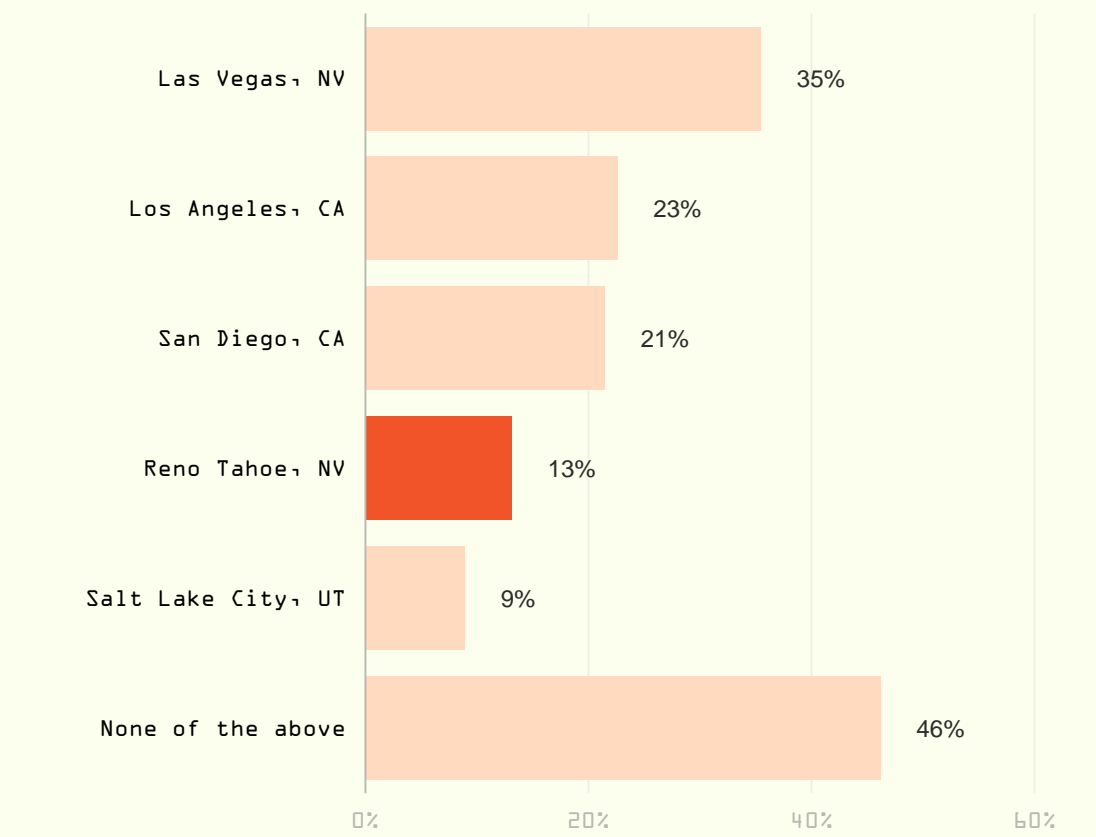
Detailed Findings: Advertising Awareness

Findings within this Advertising Awareness section are based on all target travelers surveyed, reflected in the chart on each page. The data tables on each page within this section present the findings based on Reno Tahoe’s three target segments: Cultured Creative, Dynamic Parents and Ambitious Adventurer.

Amongst a competitive set of destinations, Reno Tahoe ranks fourth for ad recall (13%), highlighting an opportunity to expand campaign reach.

However, Reno Tahoe is much more competitive on unaided ad awareness among the target segments. One-third or more of Cultured Creatives (33%), Dynamic Parents (38%) and Ambitious Adventurers (37%) recall seeing ads for Reno Tahoe in the past 12 months.

Competitor Advertising



Detail by Target Segments

	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Las Vegas, NV	35%	37%	40%	43%
Los Angeles, CA	23%	41%	45%	44%
San Diego, CA	21%	33%	38%	33%
Reno Tahoe, NV	13%	33%	38%	37%
Salt Lake City, UT	9%	21%	22%	24%
None of the above	46%	29%	22%	24%
Base	1,600	273	270	227

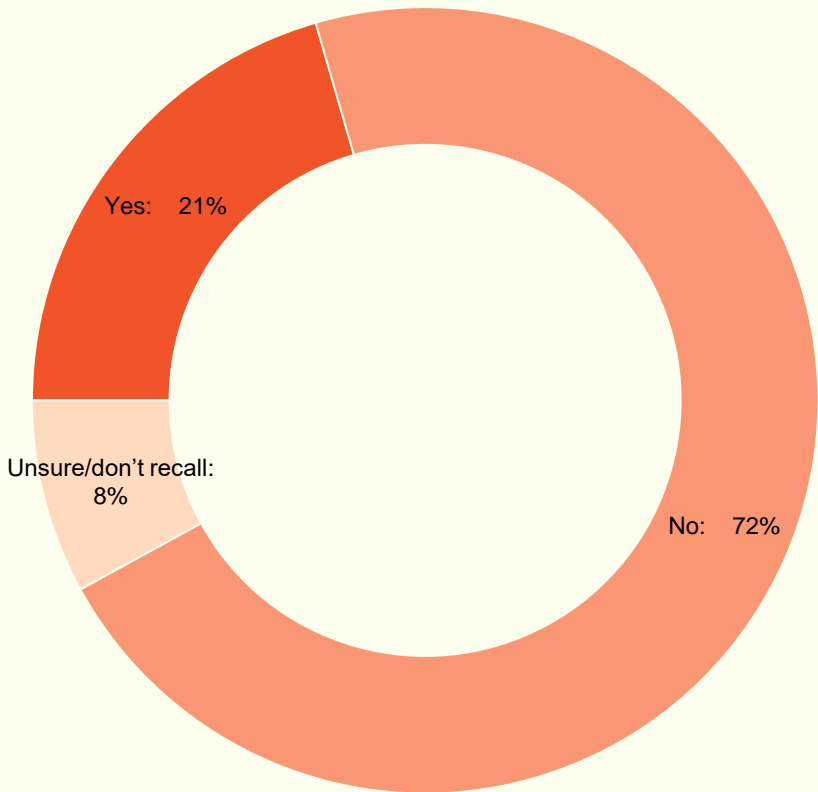
Question: In the past 12 months, do you recall seeing any advertisements for any of the following destinations? Select all that apply.

Base: 2024 respondents. 1,600 completed surveys.

Overall, one-in-five target travelers recalls seeing a paid media ad for Reno Tahoe in the past six months (21%).

Presented with ads from the Reno Tahoe campaign, target travelers were asked if they saw the ads in the past 6 months. While one-in-five of the target audience recalls the ads, this recall more than doubles amongst the target segments: Cultured Creatives (51%), Dynamic Parents (57%), and Ambitious Adventurers (56%).

Reno Tahoe Paid Media Awareness



Detail by Target Segments

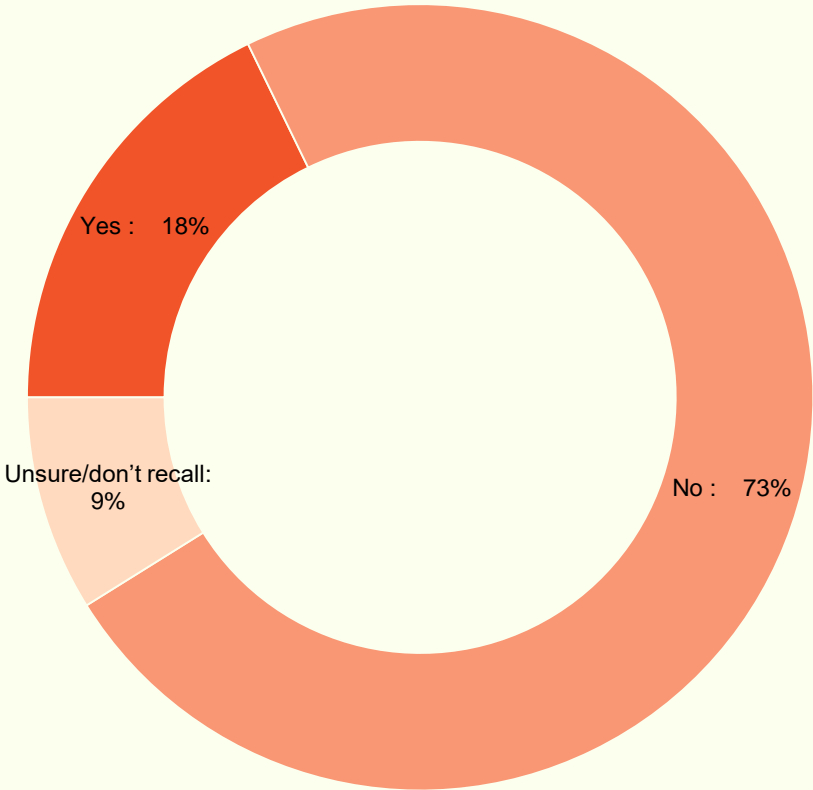
	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Yes	21%	51%	57%	56%
No	72%	44%	41%	41%
Unsure/don't recall	8%	5%	2%	3%
Base	1,600	273	270	227

Question: Have you seen these or similar ads, sponsored social media posts, billboards, and/or articles for Reno Tahoe in the past 6 months?
Base: 2024 respondents. 1,600 completed surveys.

One-in-five target travelers recall news stories, articles or blogs about travel to Reno Tahoe in the past year (18%).

As with paid advertising recall and use of Visit Reno Tahoe’s owned channels, the target segments report significantly higher levels of earned media recall for Reno Tahoe.

Reno Tahoe Earned Media Awareness



Detail by Target Segments

	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Yes	18%	46%	51%	51%
No	73%	47%	44%	42%
Unsure/don't recall	9%	7%	5%	7%
Base	1,600	273	270	227

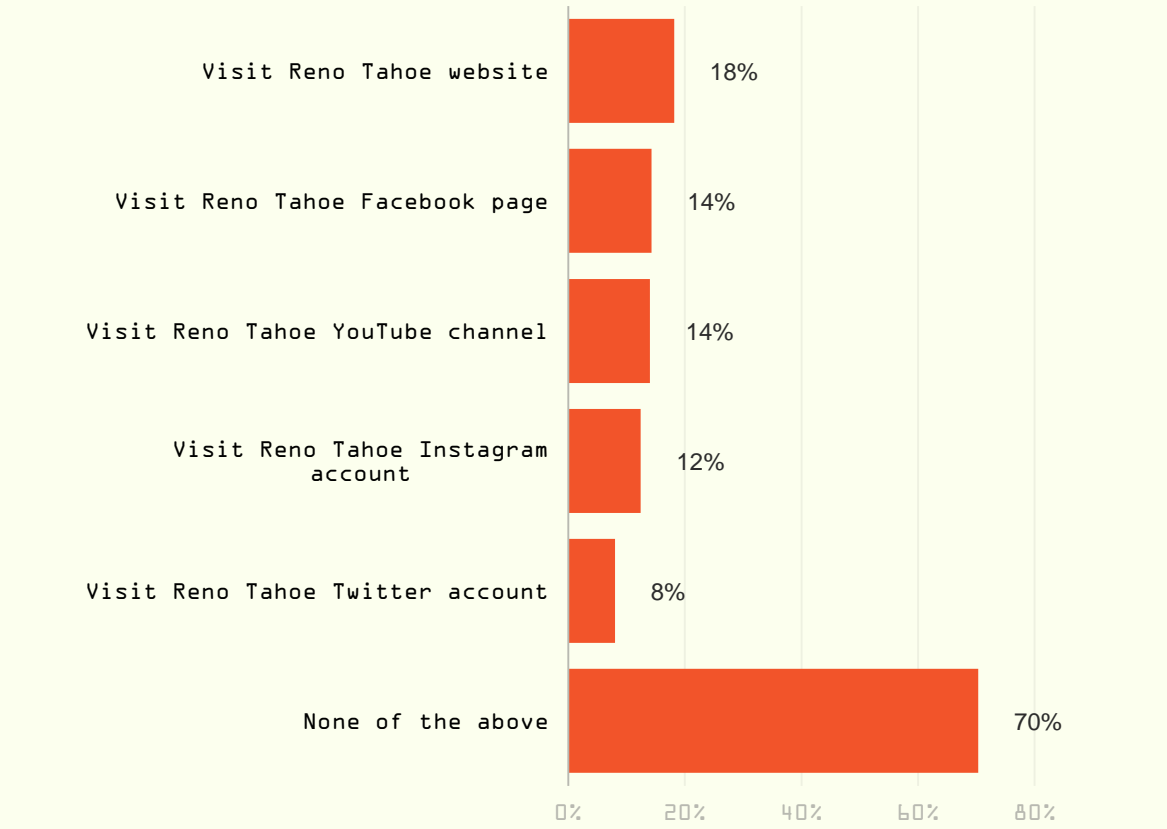
Question: In the past 12 months, do you recall seeing any news stories, articles, or blogs about travel to Reno Tahoe?

Base: 2024 respondents. 1,600 completed surveys.

About a third of target travelers have visited at least one of Visit Reno Tahoe’s owned channels in the past year (30%).

The official Visit Reno Tahoe website is the most visited owned channel (18%). Amongst the target segments, Ambitious Adventurers are the likeliest to have used the official website (53%) and official YouTube channel (50%) in the past 12 months.

Reno Tahoe Owned Channel Awareness



Detail by Target Segments

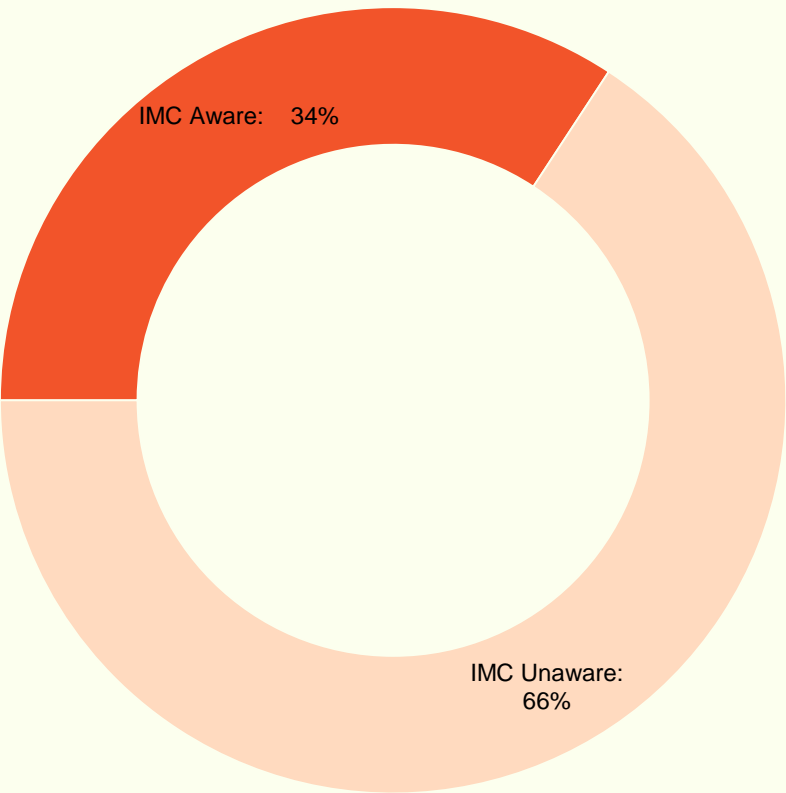
	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Visit Reno Tahoe website	18%	46%	50%	53%
Visit Reno Tahoe Facebook page	14%	42%	48%	42%
Visit Reno Tahoe YouTube channel	14%	46%	46%	50%
Visit Reno Tahoe Instagram account	12%	37%	42%	40%
Visit Reno Tahoe Twitter account	8%	30%	31%	30%
None of the above	70%	26%	24%	21%
Base	1,600	273	270	227

Question: In the past 12 months, have you visited any of the following? Select all that apply. respondents. 1,600 completed surveys.

A third of target travelers (34%) are aware of Reno Tahoe’s integrated marketing campaign, having recalled paid, earned and/or owned Reno Tahoe marketing.

As noted for each element of the IMC (paid, earned and owned), the target segments demonstrate higher levels of awareness compared to the average target Traveler surveyed: Cultured Creatives (78%), Dynamic Parents (79%), and Ambitious Adventurers (81%).

Integrated Marketing Campaign (IMC) Awareness
(Paid Media Aware, Owned Channel Aware, or Earned Media Aware)



Detail by Target Segments

	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
IMC Aware	34%	78%	79%	81%
IMC Unaware	66%	22%	21%	19%
Base	1,600	273	270	227

Question 1: Have you seen these or similar ads, sponsored social media posts, billboards, and/or articles for Reno Tahoe in the past 6 months?

Question 2: In the past 12 months, do you recall seeing any news stories, articles, or blogs about traveling to Reno Tahoe?

Question 3: In the past 12 months, have you visited any of the following? Select all that apply.

Base: 1,600 respondents. 1,600 completed surveys.



Detailed Findings: Paid Advertising Impact

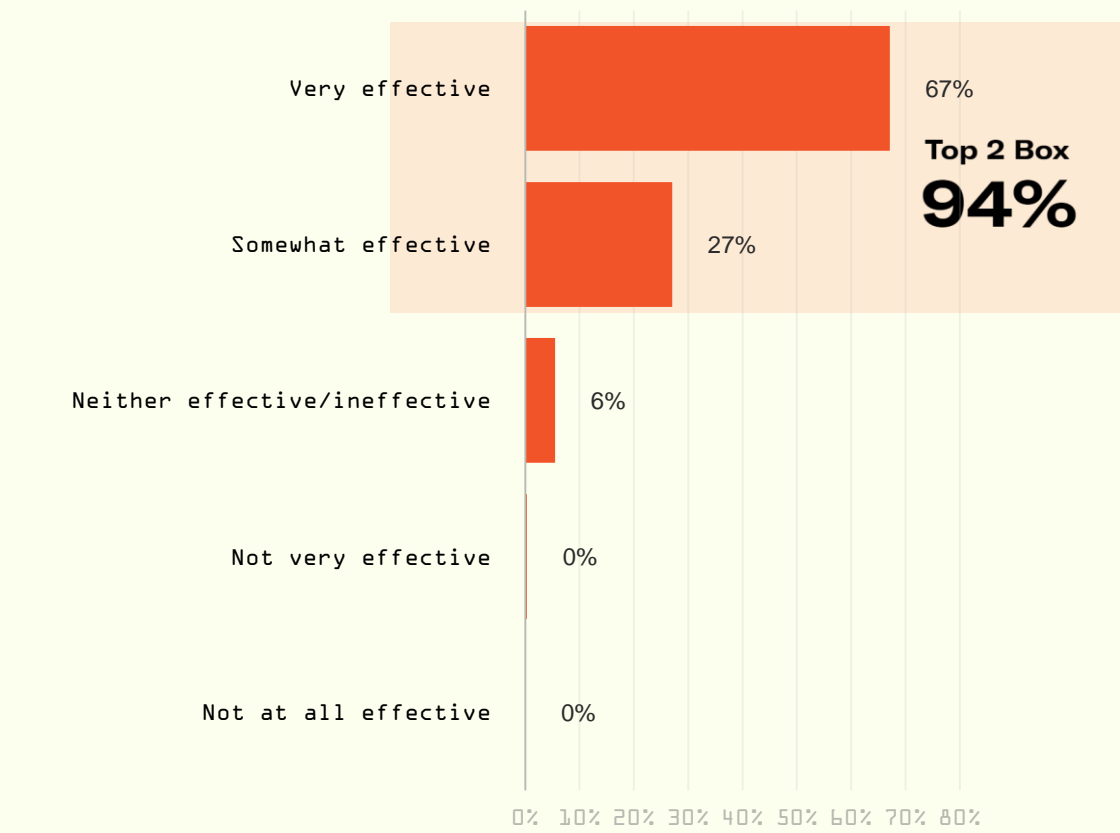
Findings within this Paid Advertising Impact section are based on all Paid Aware survey respondents, or travelers who reported having recalled advertisements, sponsored social media posts, billboards, and/or sponsored articles paid for by Reno Tahoe in the past six months.



Reno Tahoe’s paid ads effectively portray Reno Tahoe as a place target travelers would enjoy visiting for leisure.

Nearly all paid media aware travelers considered the ads “somewhat” or “very” effective in communicating the destination as a place they would enjoy visiting (94.2%). Target segments were even more likely than the average paid aware traveler to consider the ads effective: Cultured Creatives (967%), Dynamic Parents (98%), and Ambitious Adventurers (98%).

Effectiveness of Reno Tahoe’s Paid Ads



Detail by Target Segments

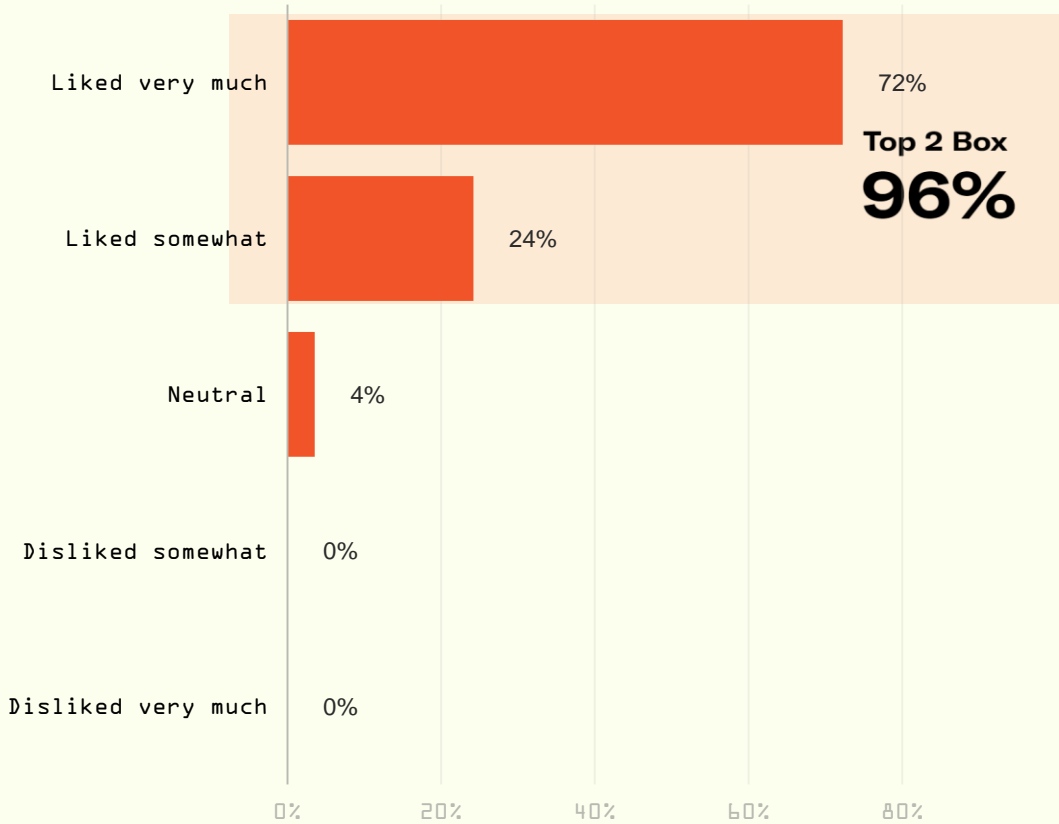
	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Top 2 Box	94%	97%	98%	98%
Very effective	67%	81%	77%	84%
Somewhat effective	27%	16%	21%	14%
Neither effective/ineffective	6%	3%	2%	2%
Not very effective	0%	0%	0%	0%
Not at all effective	0%	0%	0%	0%
Base	343	140	154	128

Question: How effective were the ads in portraying Reno Tahoe as a place you would enjoy visiting for leisure?
Base: Paid aware respondents. 343 completed surveys.

The Reno Tahoe ad campaign was well-liked amongst paid ad aware travelers.

Nearly all paid media aware travelers liked the ads “somewhat” or “very much” (96%). Approaching universality, even more of those in each of the target segments agreed: Cultured Creatives (98%), Dynamic Parents (99%), and Ambitious Adventurers (99%).

Reno Tahoe Ad Likeability



Detail by Target Segments

	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Top 2 Box	96%	98%	99%	99%
Liked very much	72%	84%	84%	87%
Liked somewhat	24%	14%	15%	12%
Neutral	4%	2%	1%	1%
Disliked somewhat	0%	0%	0%	0%
Disliked very much	0%	0%	0%	0%
Base	343	140	154	128

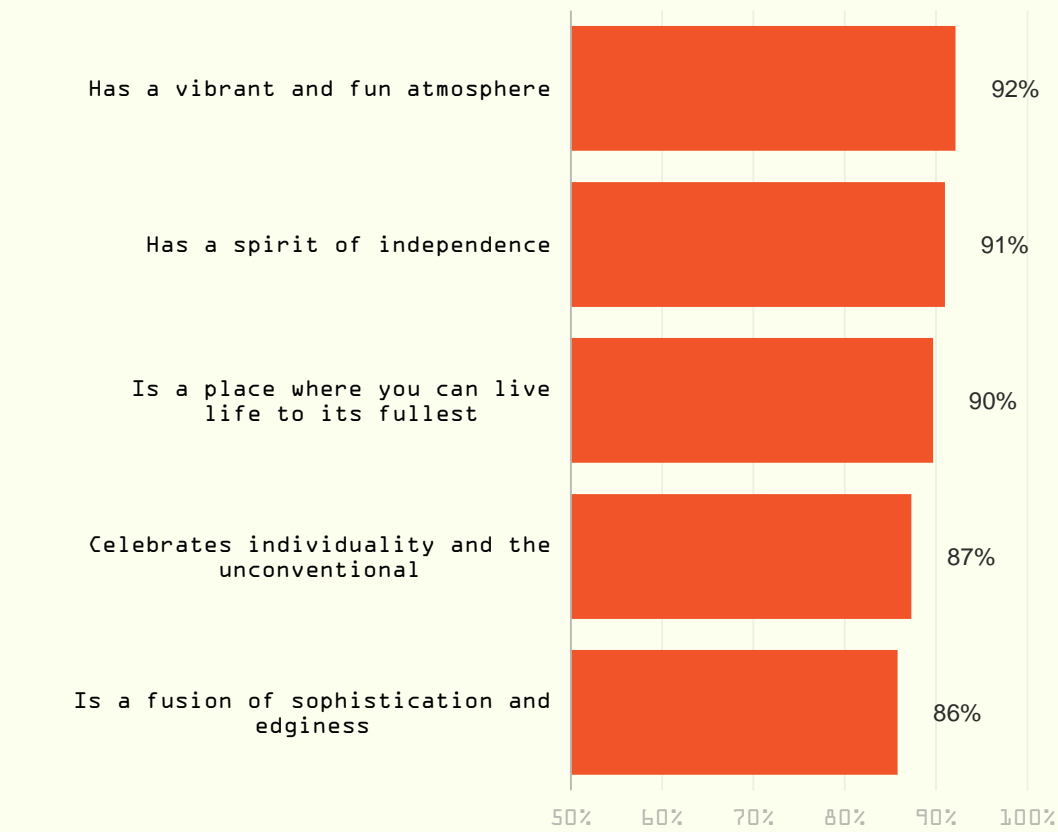
Question: How much did you like or dislike these ads?
Base: Paid Aware 2024 respondents. 343 completed surveys.

The ad campaign successfully depicts Reno Tahoe on tested brand attributes.

Nine-in-ten paid aware travelers agree that the ads show Reno Tahoe as vibrant and fun (92%), has a spirit of independence (91%), and is a place to live life to its fullest (90%). Though there is relatively less agreement with individuality (87%) and the fusion of sophistication and edginess (86%), the campaign strongly portrays these attributes of Reno Tahoe, with 86 percent or more who agreed that these attributes are communicated. As has been the trend, the target segments approach 100 percent for the top three brand attributes portrayed by the campaign.

Ad Impact on Brand Attributes

(Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")



Detail by Target Segments

	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Has a vibrant and fun atmosphere	92%	98%	97%	97%
Has a spirit of independence	91%	97%	97%	96%
Is a place where you can live life to its fullest	90%	97%	93%	97%
Celebrates individuality and the unconventional	87%	92%	90%	93%
Is a fusion of sophistication and edginess	86%	92%	90%	93%

Base	343	140	154	128
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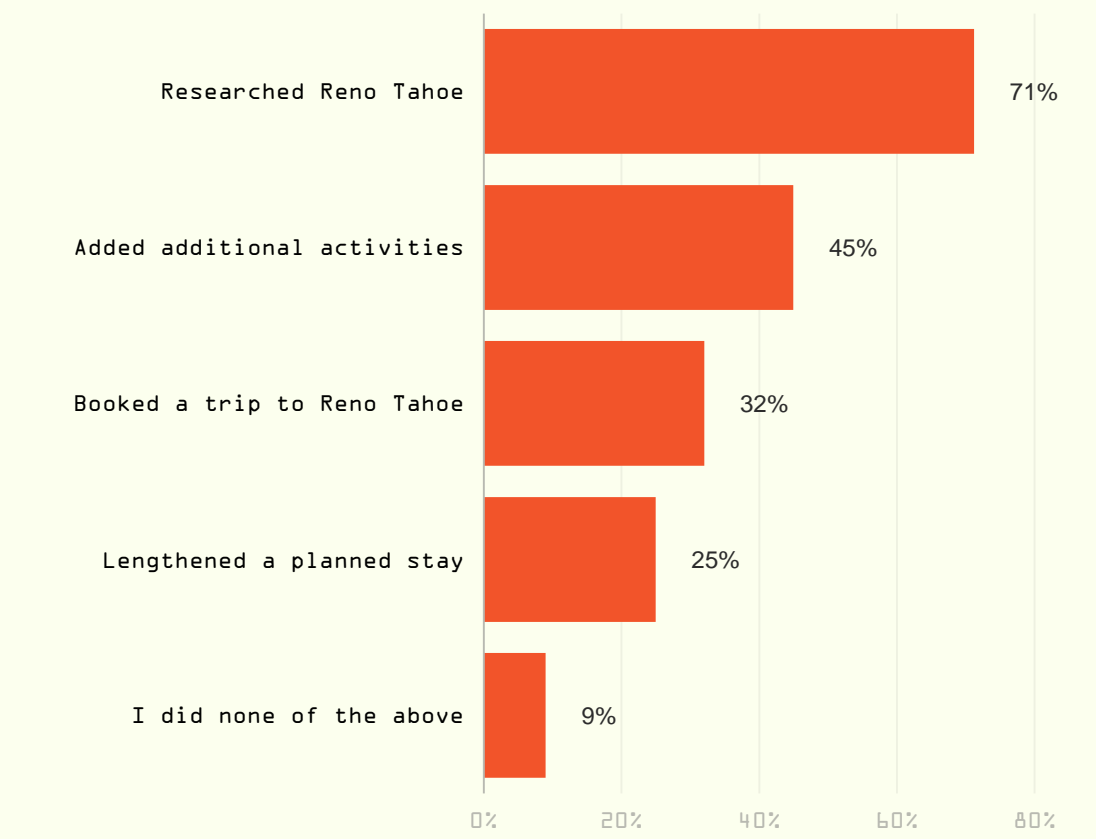
Question: In your opinion, did the ads portray Reno Tahoe as a place that...?

Base: Paid Aware 2024 respondents. 343 completed surveys.

The vast majority of paid aware travelers took a positive action after exposure to a Reno Tahoe ad (91.0%).

About three-quarters of paid aware travelers researched Reno Tahoe after exposure to an ad (71%). Further, and importantly, one-third reported that they booked a trip after seeing an ad (32%). Other actions included adding activities to a planned trip (45%) and/or lengthening a planned stay (25%). Nearly all target segments took an action after seeing a Reno Tahoe ad.

Action Taken After Seeing a Reno Tahoe Ad



Detail by Target Segments

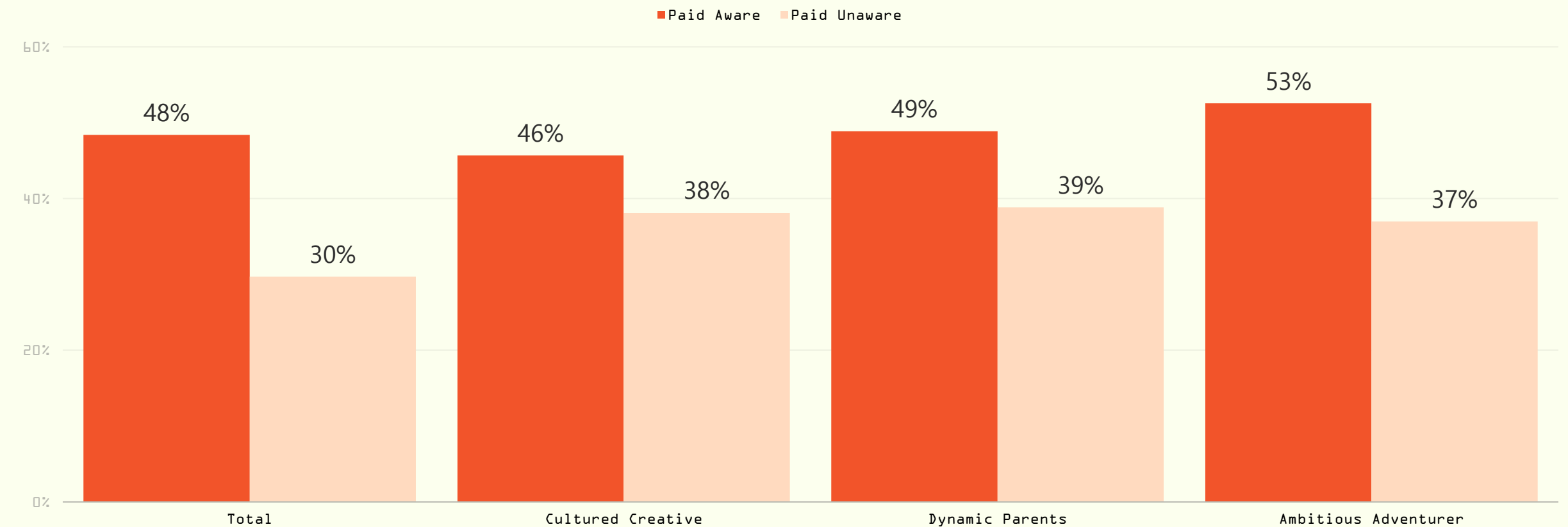
	Total	Cultured Creative	Dynamic Parents	Ambitious Adventurer
Researched Reno Tahoe	71%	81%	79%	80%
Added additional activities	45%	59%	59%	58%
Booked a trip to Reno Tahoe	32%	46%	46%	46%
Lengthened a planned stay	25%	35%	32%	30%
I did none of the above	9%	4%	3%	4%
Base	343	140	154	128

Question: Which of the following did you do after seeing an ad for Reno Tahoe?
Base: Paid Aware 2024 respondents. 343 completed surveys.

Exposure to Reno Tahoe’s paid ad campaign correlates to a higher level of interest in visiting the destination.

Nearly half of paid ad aware travelers reported interest in visiting Reno Tahoe in the next two years (48%), compared to 30 percent for paid unaware travelers. Interest is also higher amongst each target segment’s paid aware and paid unaware sub-segments, yet the deltas are smaller than for all target travelers.

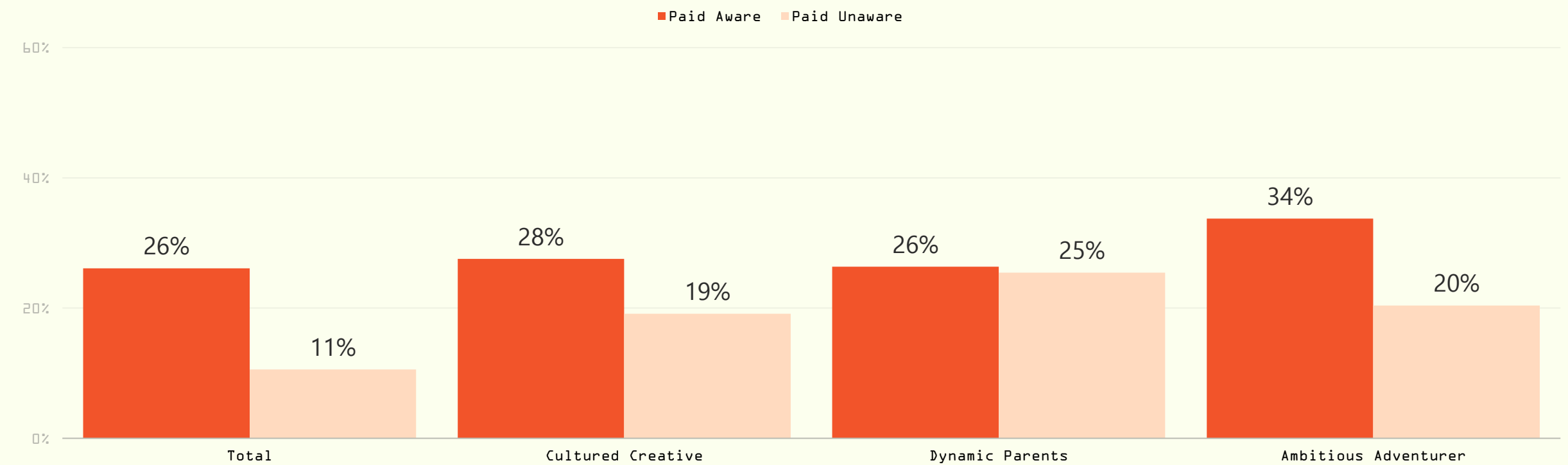
Ad Impact on Travel Interest Next Two Years by Target Segments



Similar to the higher level of interest, paid aware target travelers are significantly more likely to have a trip planned to Reno Tahoe in the next year.

More than twice as many paid aware travelers than paid unaware travelers reported that they are planning to visit Reno Tahoe in the next 12 months (26% vs. 11%). Aligning with the trend seen for target segments, planned visitation is even higher than the typical target traveler, although the deltas between the paid aware and paid unaware sub-samples within each segment are smaller than for all target travelers.

Ad Impact on Plans to Visit Next 12 Months by Target Segments



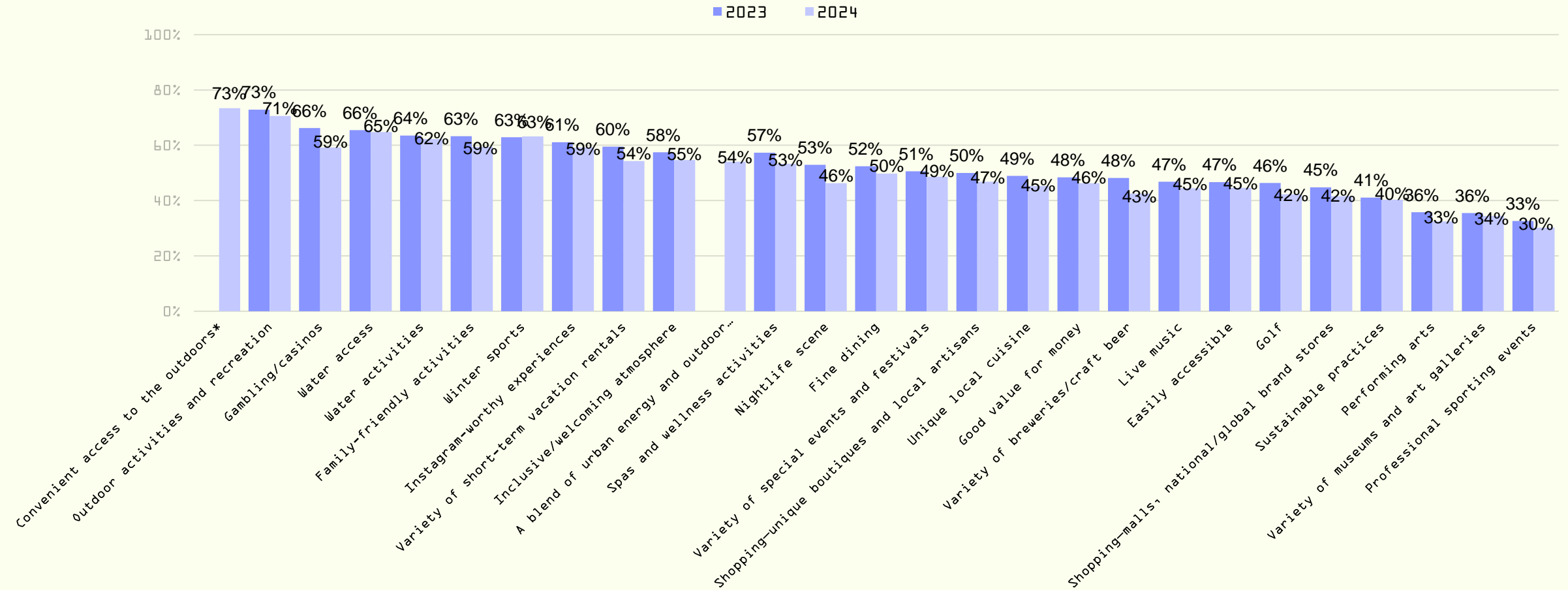
Appendix: Historical Comparison



Brand Health: CY 2023 vs CY 2024

These data points should be considered informational and not directional given methodological differences in survey design and data collection.

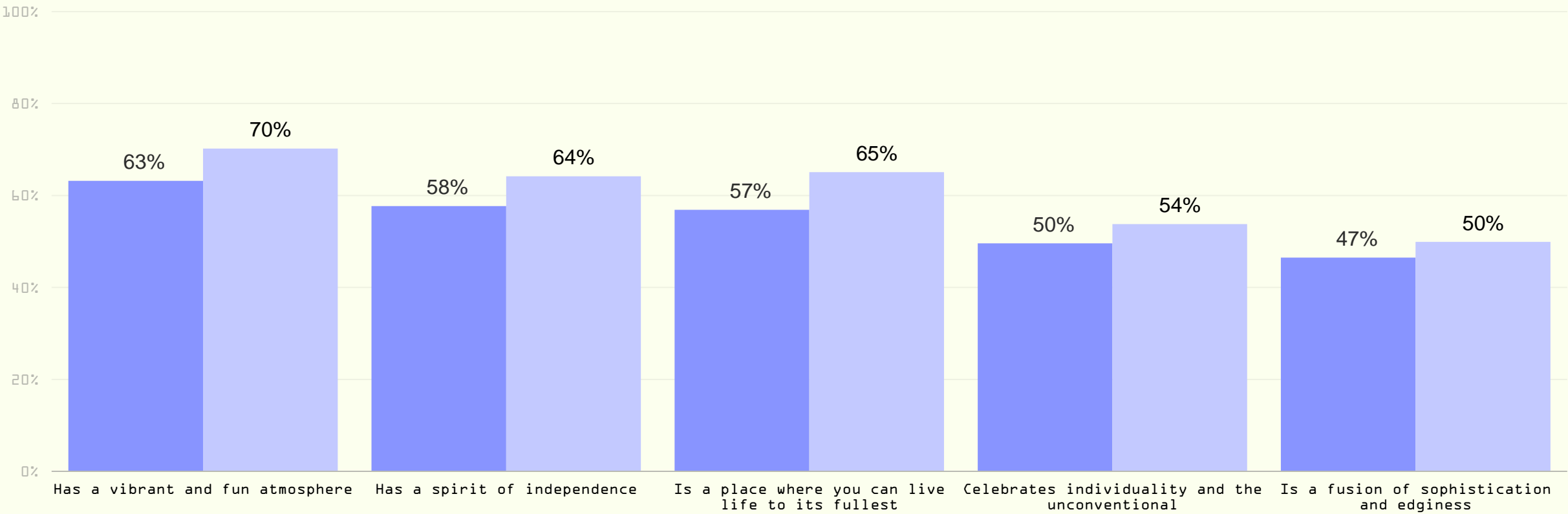
Reno Tahoe Destination Attribute Ratings
(Top 2 Box Agreement - % selecting "Agree" or "Strongly agree")



Brand Health: CY 2023 vs CY 2024

These data points should be considered informational and not directional given methodological differences in survey design and data collection.

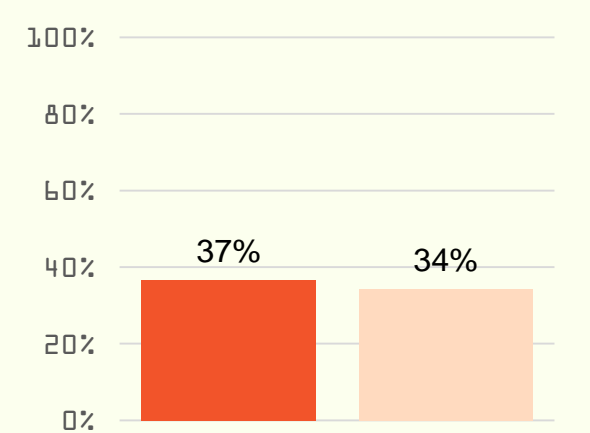
Brand Descriptor Ratings
(Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")



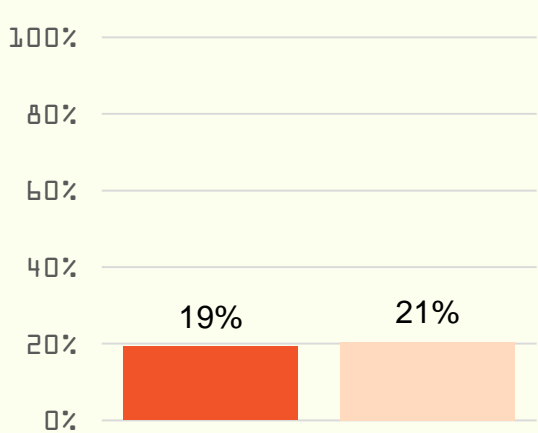
Ad Tracking: CY 2023 vs CY 2024

These data points should be considered informational and not directional given methodological differences in survey design and data collection.

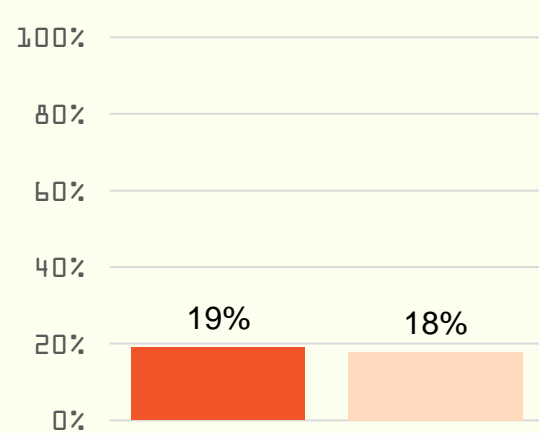
IMC Recall
(% who recall seeing paid, earned, or owned ads)



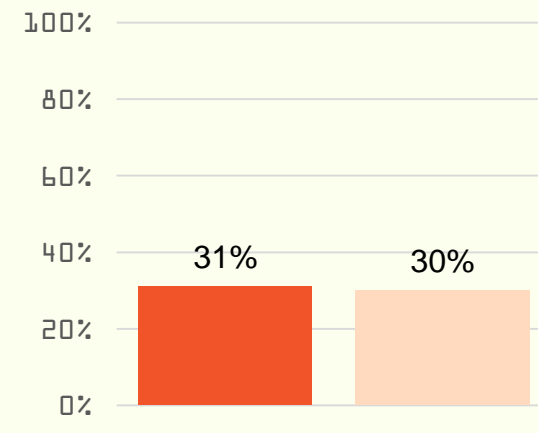
Paid Recall
(past 12 months)



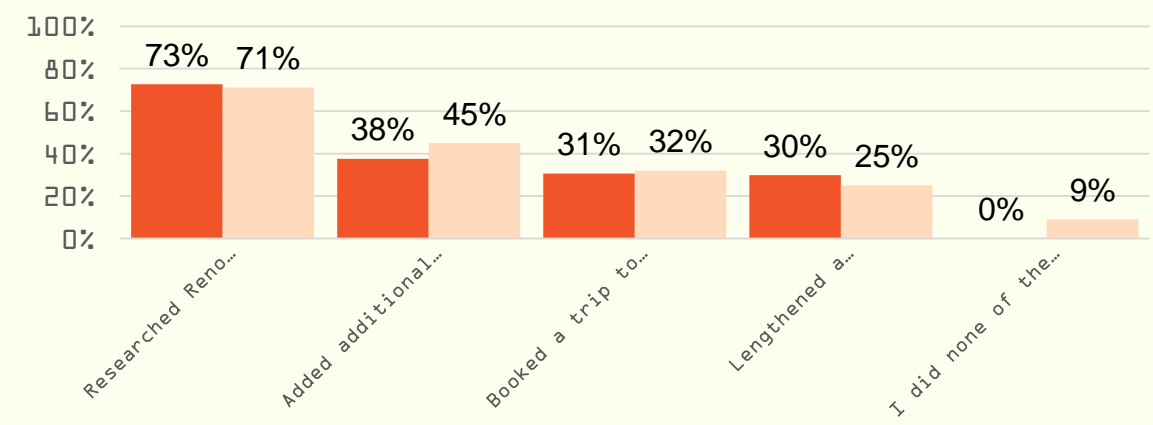
Earned Recall
(past 12 months)



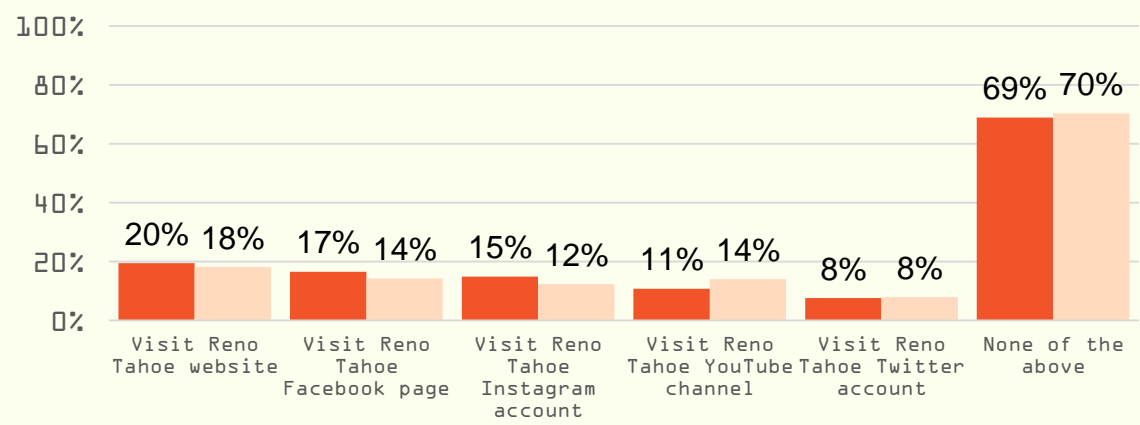
Owned Recall
(past 12 months)



Actions Taken
(among those who recall seeing paid ads)



Owned Recall Channels
(among those who recall seeing owned ads)



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Thank You!