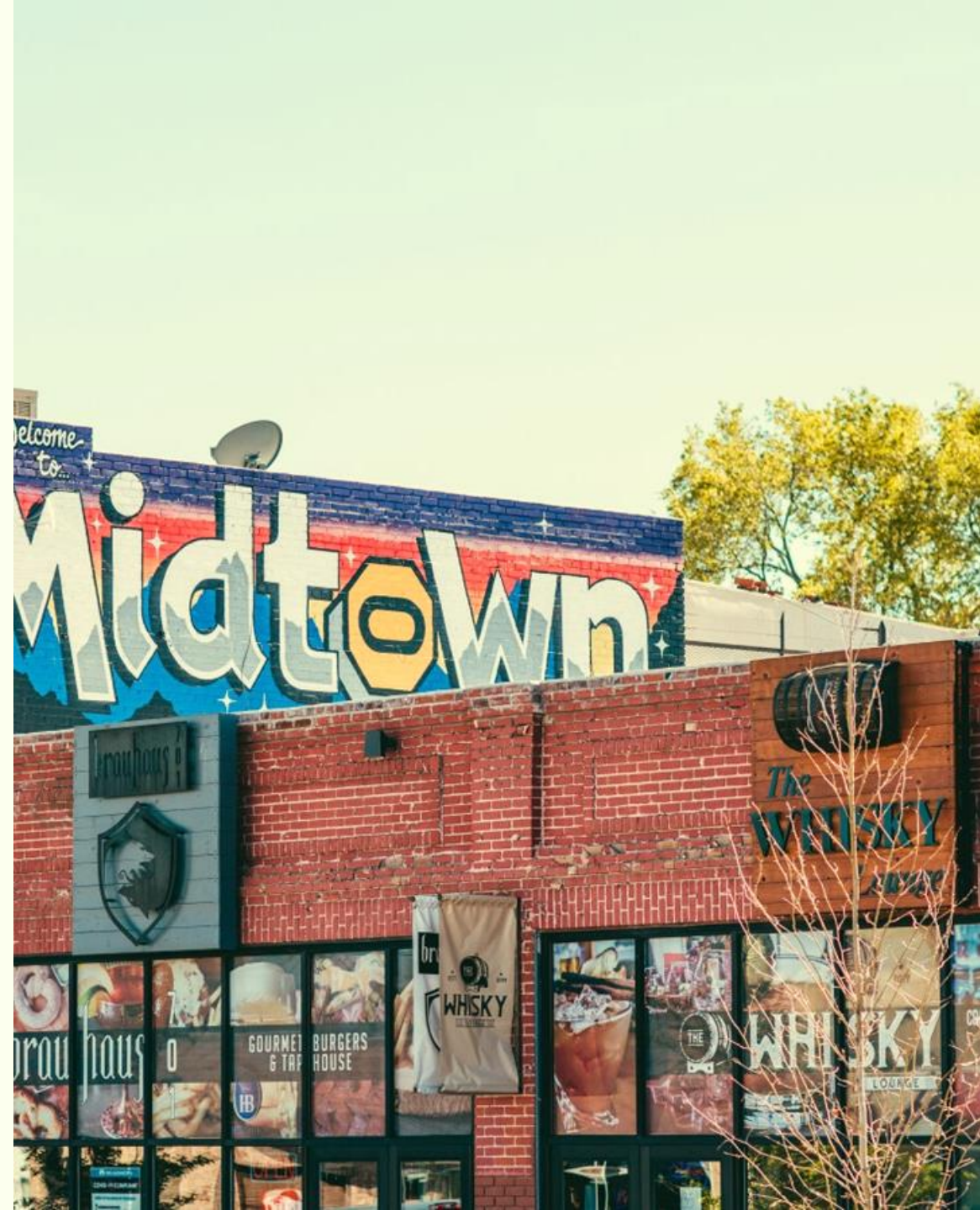




Reno-Sparks Convention & Visitors Authority Reno Tahoe 2024 Resident Sentiment

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Research Overview & Objectives

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

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 was specifically designed to explore:

- Perceptions of tourism among Washoe County residents
- Perceptions of the tourism industry's impact on the economy, jobs, community and personal life
- Quality of life as a result of tourism



Research Methodology

Future Partners conducted an online survey of N=400 Washoe County residents who are adults age 18+.

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 county demographics.



About This Report

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

- **Washoe County Residents** – all survey respondents.
- **Nevada and California Residents** – residents of these states surveyed in Future Partners' October 2024 wave of *The State of the American Traveler*.
- **Currently Working in Tourism Industry** – Washoe County residents who are currently employed by a business/company that serves Washoe County's tourism industry. Note the small sub-sample size of 61 completed surveys.
- **Not Working in Tourism Industry** - Washoe County residents who are not currently employed by a business/company that serves Washoe County's tourism industry.
- **Natives or Born in Washoe County** – Washoe County residents who were born in the County.
- **Transplants or Born Outside of Washoe County** - Washoe County residents who were born outside of the County.

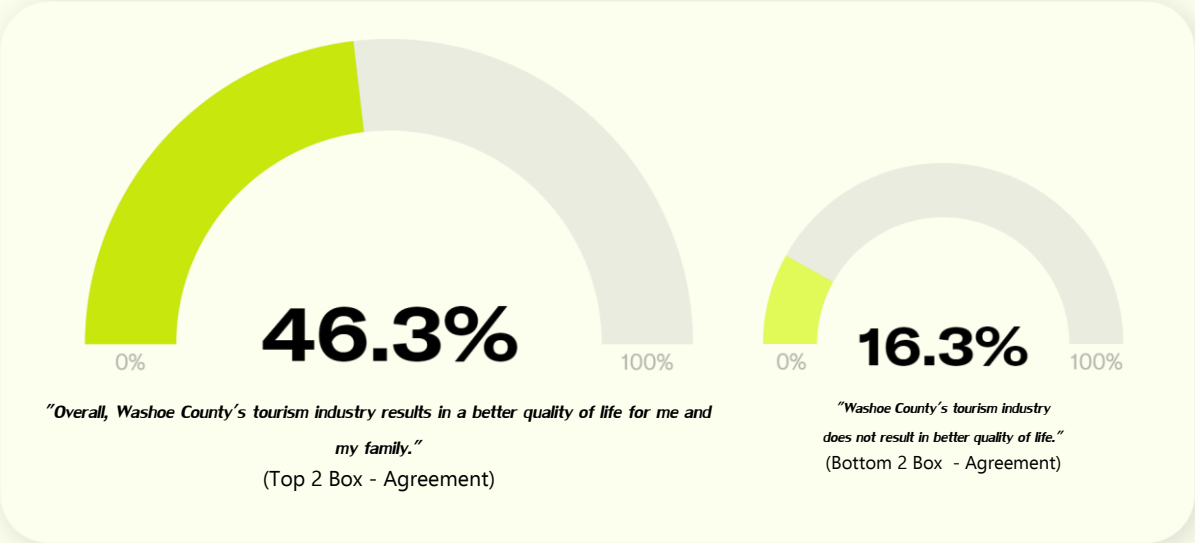
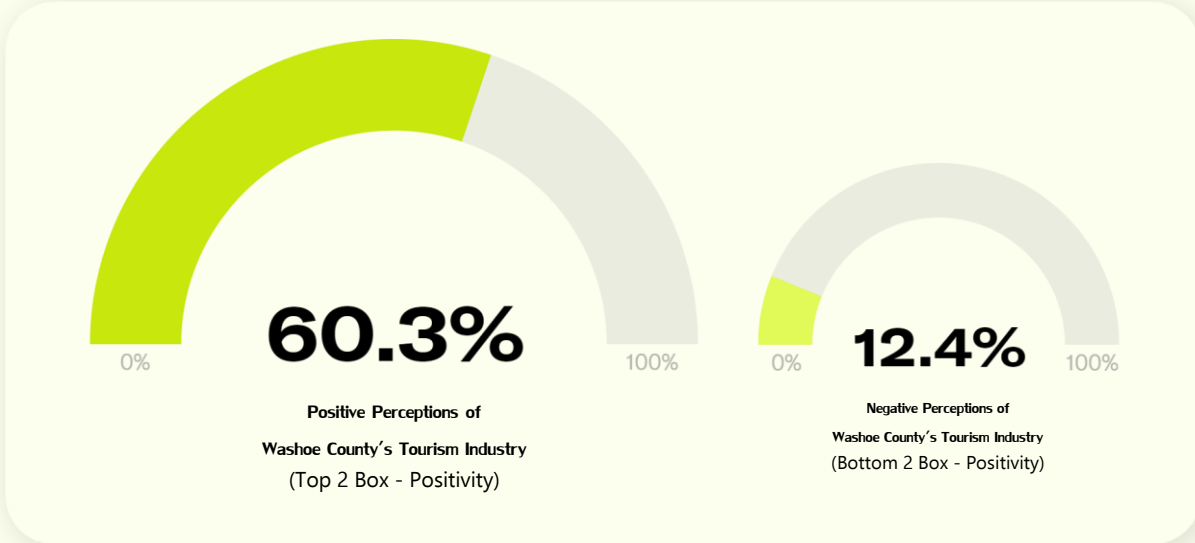
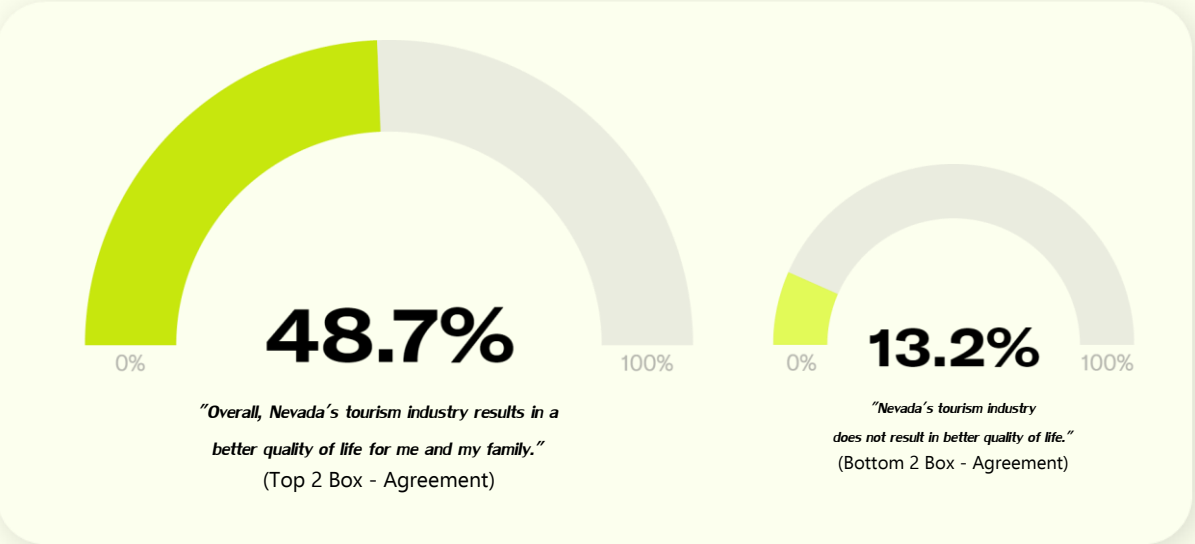
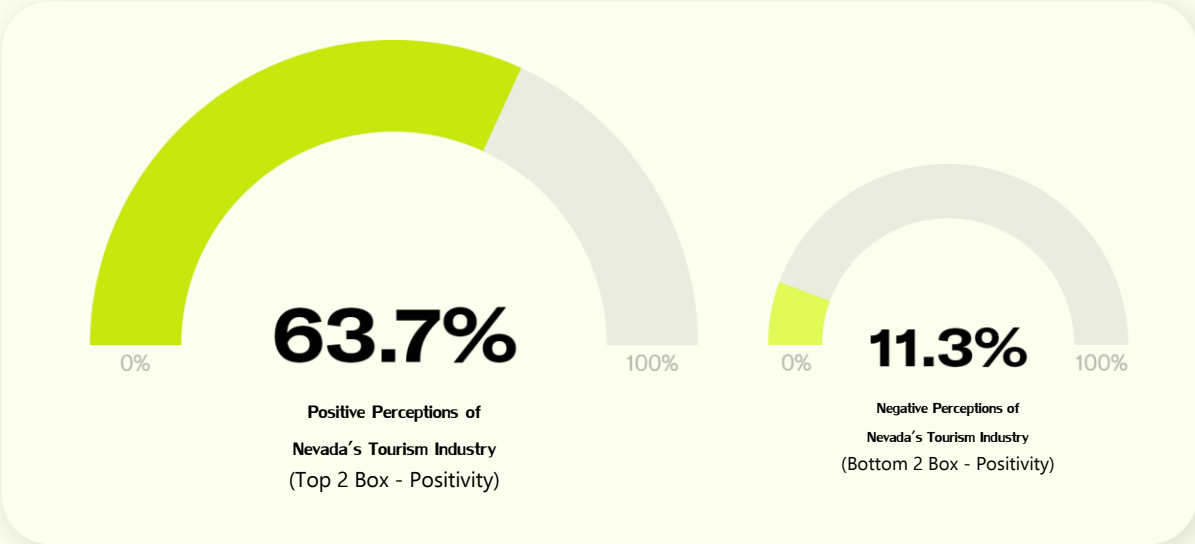


Executive Summary

Washoe County residents express pride in their home state of Nevada and are optimistic about their future quality of life.

- Two-thirds or more are happy to live in Nevada (67%), consider themselves Nevadan (67%), and are proud of living in Nevada (667%). In addition, Washoe County residents surveyed agree that they live in the best part of the state (62%). Additionally, over 70 percent say they can always find something to do in Nevada when they have free time (73%) and they agree that the state is culturally diverse (71%).
- More than half of Washoe County residents surveyed (55%) expect that their personal quality of life will improve in the next year, higher than the share of residents who feel it has improved compared to a year ago (41%).

Snapshot of Tourism Industry Perceptions



Residents have positive perceptions about both the statewide and local tourism industries and agree that they result in a better quality of life.

- About two-thirds of Washoe County residents have positive perceptions of Nevada's statewide tourism industry (64%) and 60 percent have positive perceptions of Washoe County's local tourism industry.
- Half of Washoe County residents surveyed agree that the state's tourism industry results in a better quality of life (49%). Similar to this level of agreement that the state's tourism industry results in a better quality of life, about half of residents agree that Washoe County's local tourism industry results in a better quality of life for them and their family (46%).

Positive sentiment about the tourism industry's impact on jobs has improved compared to last year.

- Approximately half of Washoe County residents agree that the local tourism industry provides ample job opportunities (47%). This is nearly 10 percentage points higher than in 2023 (38%). However, residents feel that it's easier to get a job in the tourism industry year-round statewide (45%) than locally (41%).
- About a quarter agree that tourism jobs pay well (27%), though this is also an improvement compared to last year (22%).
- Agreement with all tested statements about tourism industry jobs have improved compared to 2023.

Tourism is seen as important to the economies of both Nevada and Washoe County, and the industry is considered important to Washoe County's future.

- About three-quarters of Washoe County residents surveyed "agree" or "strongly agree" that tourism is very important to Nevada's economy and tourism is very important to Washoe County's economy.
- Over two-thirds also agree that tourism is an important part of Washoe County's future.

While residents express concerns about the impacts of tourism to their community, they also acknowledge the industry's many benefits.

- The top impacts of tourism on the community illustrate the need for balance between opposing viewpoints.
- Three-quarters of Washoe County residents worry about housing prices (74%), however the same percentage of residents acknowledges tourism's support of local experiences and events (74%).
- Similarly, residents surveyed feel that tourism causes crowds and traffic (67%), yet they also agree that tourism creates new dining, entertainment and shopping opportunities in the community (64%).

Profile of Washoe County Residents

Born in Washoe County

24%

Long-Term Resident (6+ years)

57%

"I am happy to live in Nevada"
(% who "Agree" or "Strongly agree")

67%

"I am proud to live in Nevada"
(% who "Agree" or "Strongly agree")

67%

"I feel a personal responsibility to represent Nevada well"
(% who "Agree" or "Strongly agree")

58%

Positive Perception of Washoe County Tourism

60%

"Overall, Washoe County's tourism industry results in a better quality of life for me and my family"
(% who "Agree" or "Strongly agree")

46%

"Tourism is an important part of Washoe County's Future"
(% who "Agree" or "Strongly agree")

68%

Resident Sentiment Benchmarks

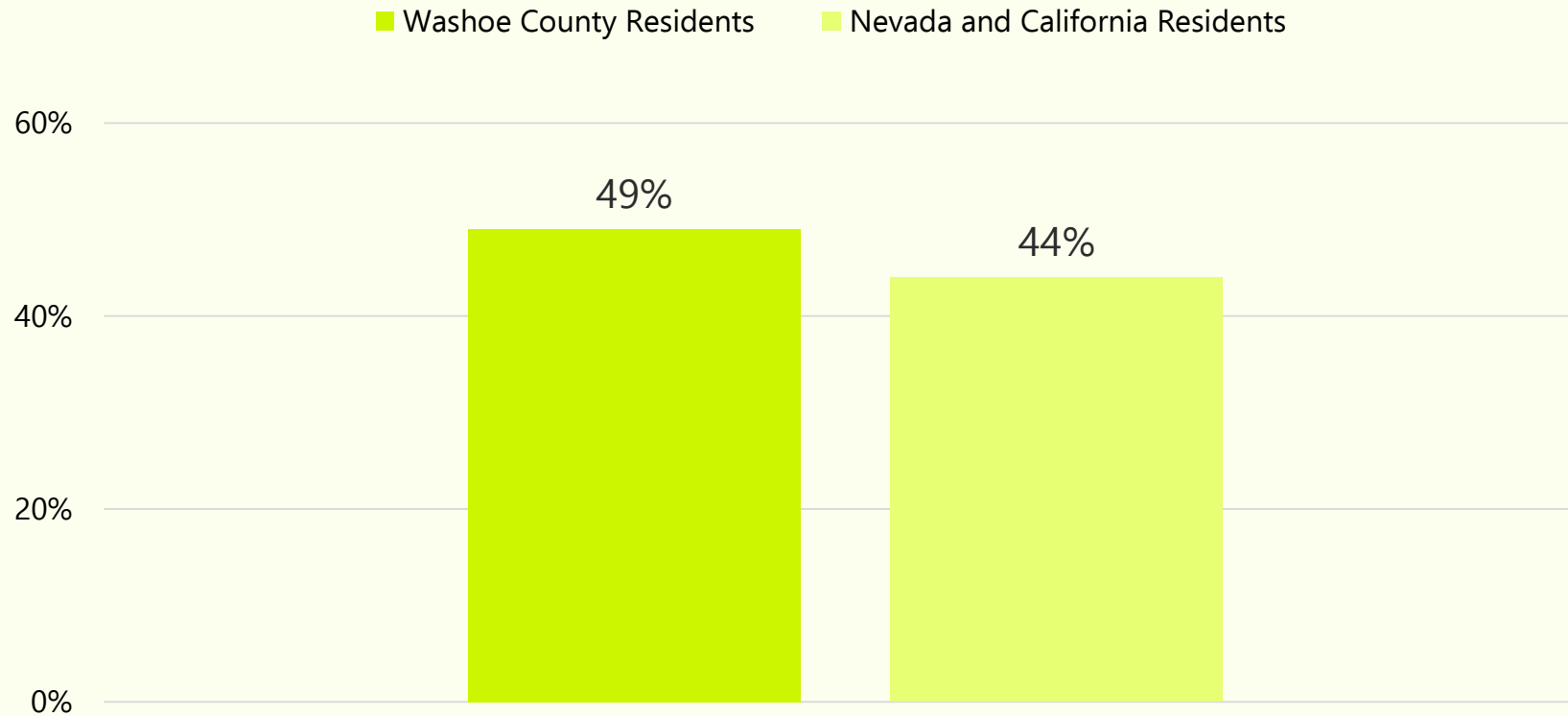
This section presents select data points from the Visit Reno Tahoe 2024 Resident Sentiment Study compared to national benchmarks from Future Partners’ *The State of the American Traveler Study*, our monthly tracking study that explores American traveler sentiment, perceptions, motivations and behaviors.

The Visit Reno Tahoe 2024 Resident Sentiment Study data within this section is based on Washoe County residents surveyed between July and December 2024, while *The State of the American Traveler* data presented within this section is based on Nevada and California residents who were surveyed in October 2024.

Washoe County residents are likelier than Nevada and California residents to agree that tourism in their community results in a better quality of life.

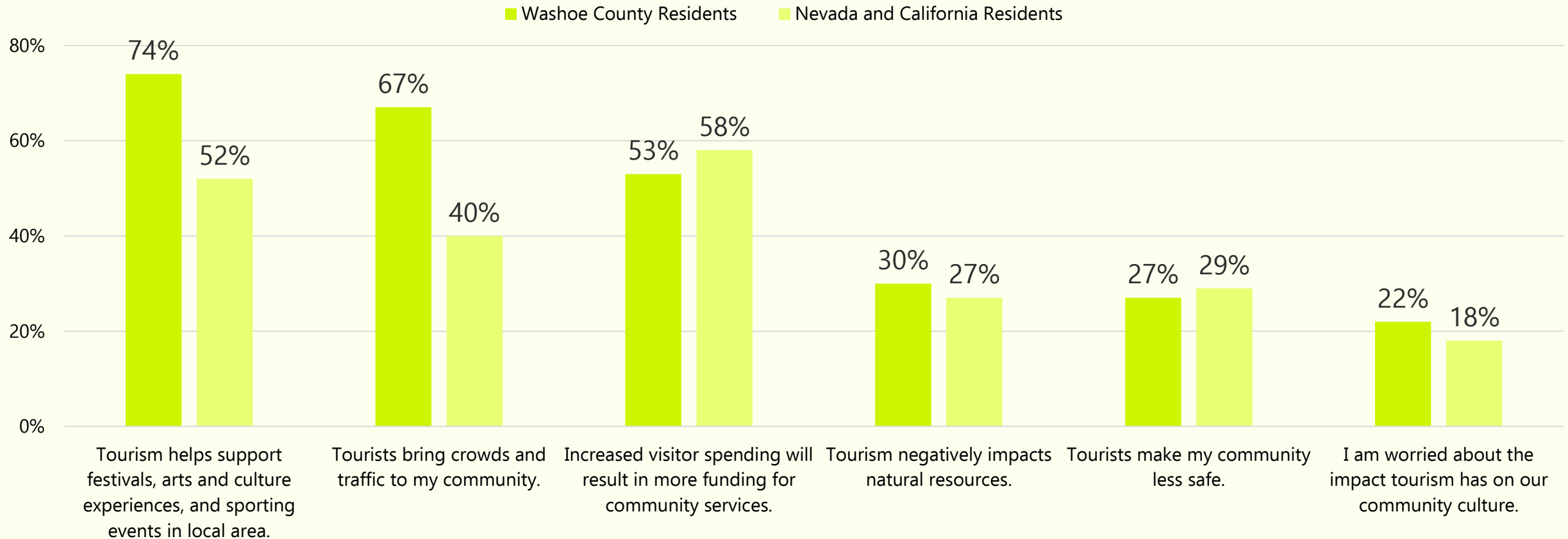
"Tourism in my community results in a better quality of life."

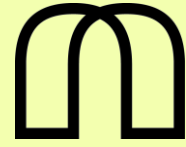
(Top 2 Box Agreement - % selecting "4" or "5 - Completely agree")



Washoe County residents are significantly more likely than Nevada and California residents to say that tourism supports festivals and events in the local area, yet it also brings crowds and traffic to their community.

Tourism Industry Impact on Community
(Top 2 Box Agreement - % selecting "4" or "5 - Completely agree")



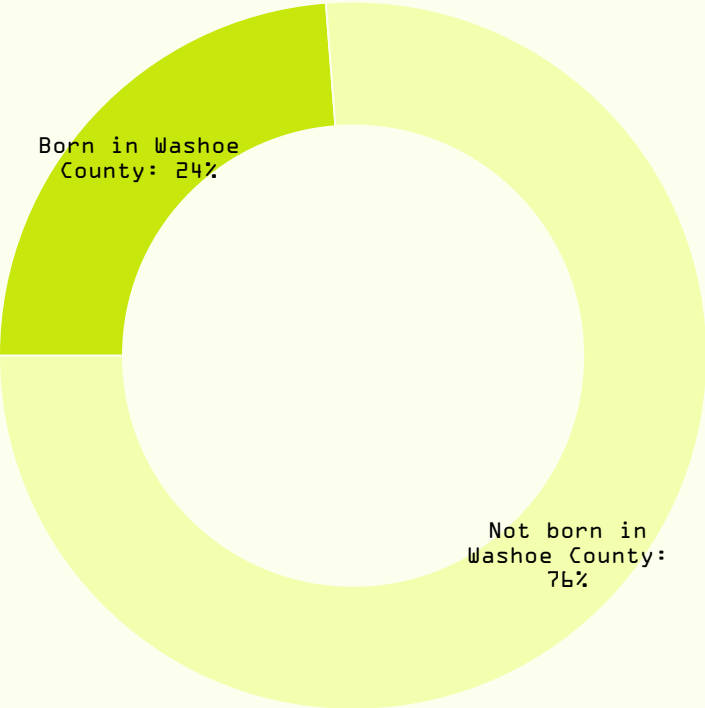


Detailed Findings: Life in Washoe County

One-quarter of Washoe County residents surveyed are native (24%).

The majority are transplants who were born outside of Washoe County (76%).

Place of Birth



Detail by Tourism Employment

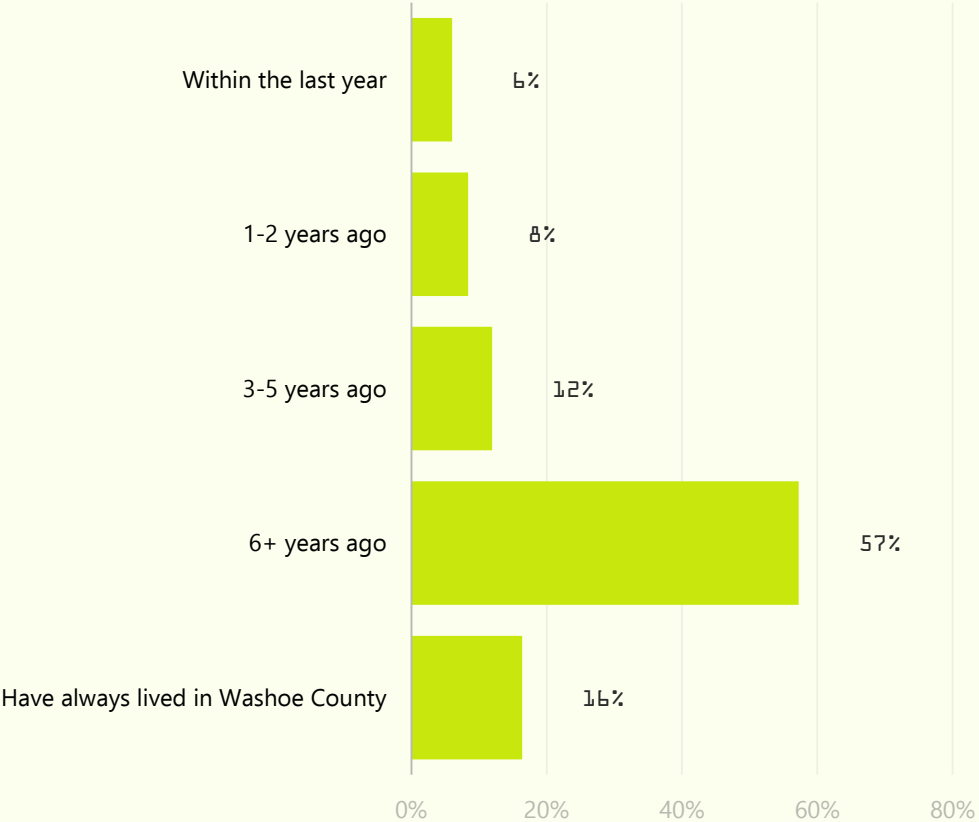
	Total	Currently Working in Tourism Industry	Not Working in Tourism Industry
Born in Washoe County	24%	31%	23%
Not born in Washoe County	76%	69%	77%
Base	400	61	339

Question: Were you born in Washoe County?
 Base: 2024 Washoe County residents. 400 completed surveys.

Well over half of residents surveyed have lived in Washoe County for at least six years (57%).

More have lived in the County all their lives (16%) than have moved to the County within the past two years (14%).

Years Lived in Washoe County



Detail by Tourism Employment

	Total	Currently Working in Tourism Industry	Not Working in Tourism Industry
Within the last year	6%	13%	5%
1-2 years ago	8%	14%	7%
3-5 years ago	12%	9%	13%
6+ years ago	57%	42%	60%
Have always lived in Washoe County	16%	23%	15%
Base	400	61	339

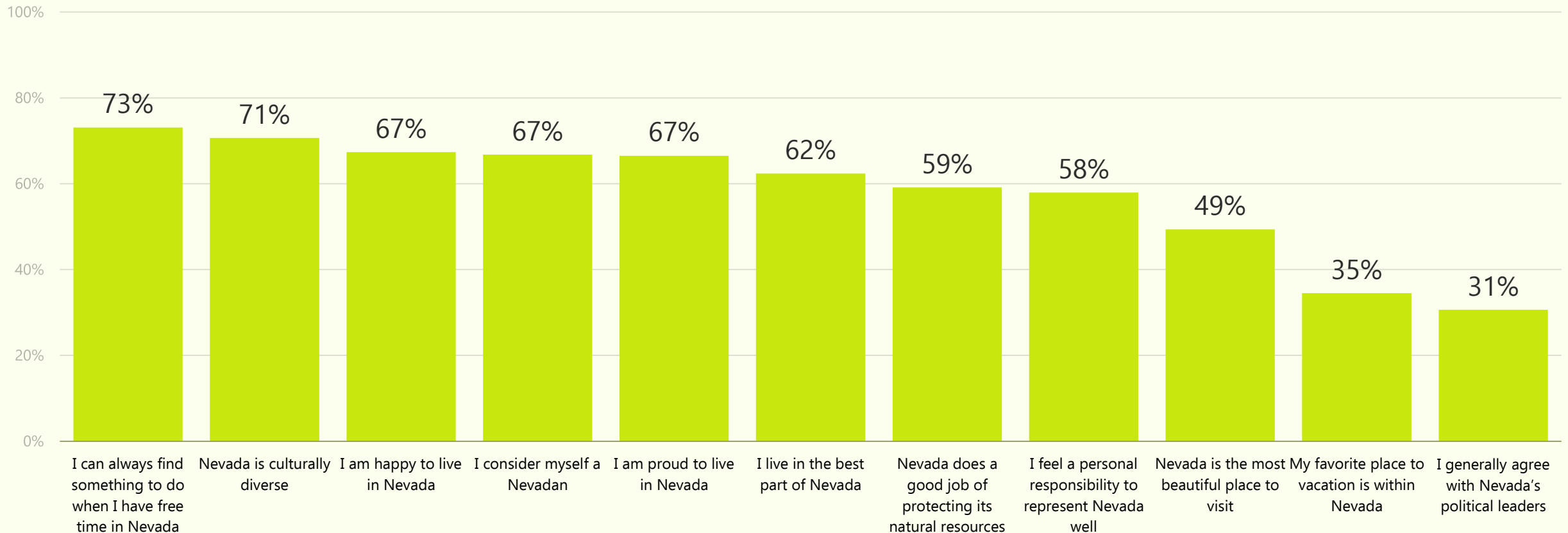
Question: How long ago did you move to Washoe County?
 Base: 2024 residents. 400 completed surveys.

Washoe County residents agree that they can always find something to do in Nevada and that the state is culturally diverse.

Over 70 percent agreed that they can always find something to do in their free time (73%) and they note the state's cultural diversity (71%). Two-thirds or more are happy to live in Nevada (67%), consider themselves Nevadan (67%), and are proud of living in Nevada (67%). In addition, Washoe County residents surveyed agree that they live in the best part of the state (62%). Meanwhile, fewer residents generally agree with Nevada's political leaders (31%).

Resident Psychographics

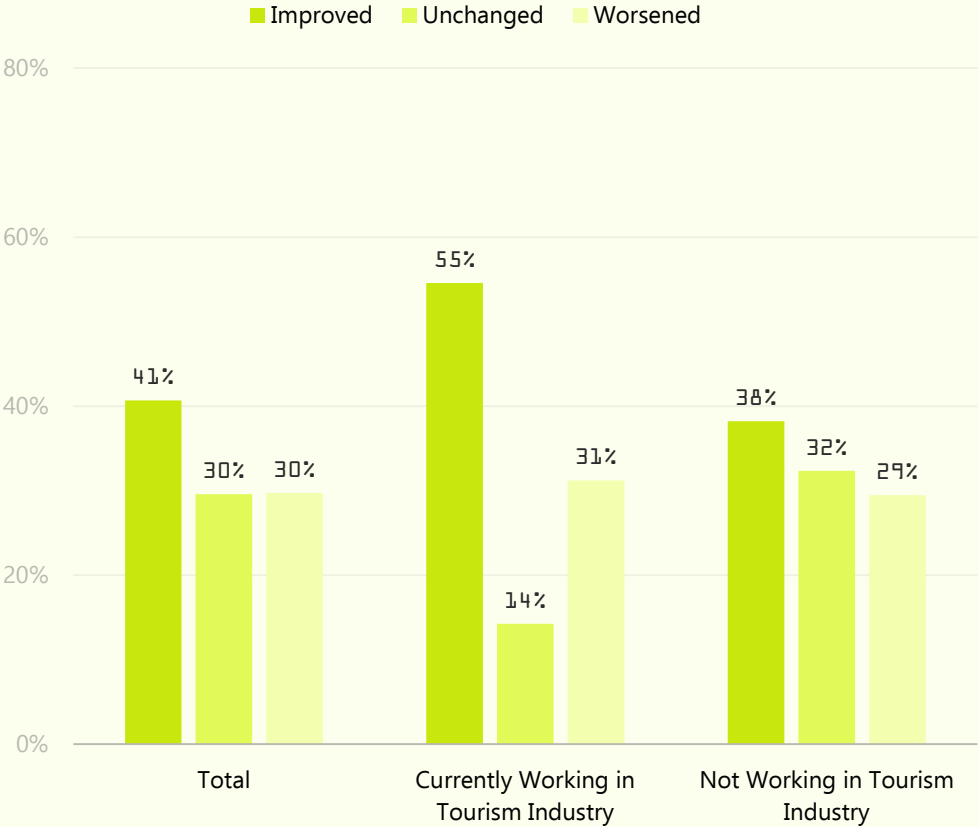
(Top 2 Box Agreement - % selecting "4" or "5 - Completely agree")



Washoe County residents feel that their quality of life has improved compared to a year ago (41%).

However, about a third feel that their personal quality of life has worsened (30%).

Overall Quality of Life



Detail by Tourism Employment

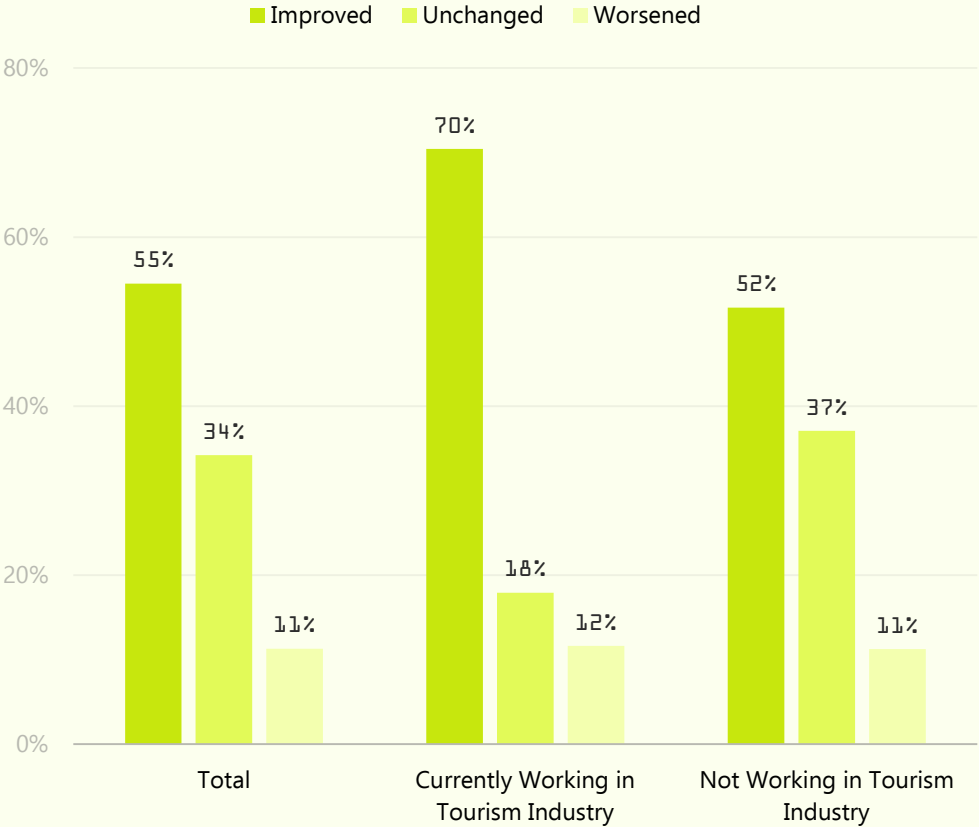
	Total	Currently Working in Tourism Industry	Not Working in Tourism Industry
Top 2 Box	41%	55%	38%
Much better	13%	13%	13%
Somewhat better	28%	41%	26%
Unchanged/same	30%	14%	32%
Somewhat worse	23%	28%	22%
Much worse	6%	3%	7%
Base	400	61	339

Question: Compared to one year ago, how would you rate your personal quality of life?
 Base: 2024 Washoe County residents. 400 completed surveys.

Washoe County residents view their future quality of life optimistically.

More than half (55%) expect that their personal quality of life will improve in the next year, higher than the share of residents who feel it has improved compared to a year ago (41%). A third expect their quality of life to remain the same (34%) while relatively few anticipate negative change (11%).

Future Quality of Life



Detail by Tourism Employment

	Total	Currently Working in Tourism Industry	Not Working in Tourism Industry
Top 2 Box	55%	70%	52%
Much better	14%	9%	15%
Somewhat better	40%	61%	36%
Unchanged/same	34%	18%	37%
Somewhat worse	10%	10%	10%
Much worse	2%	2%	2%
Base	400	61	339

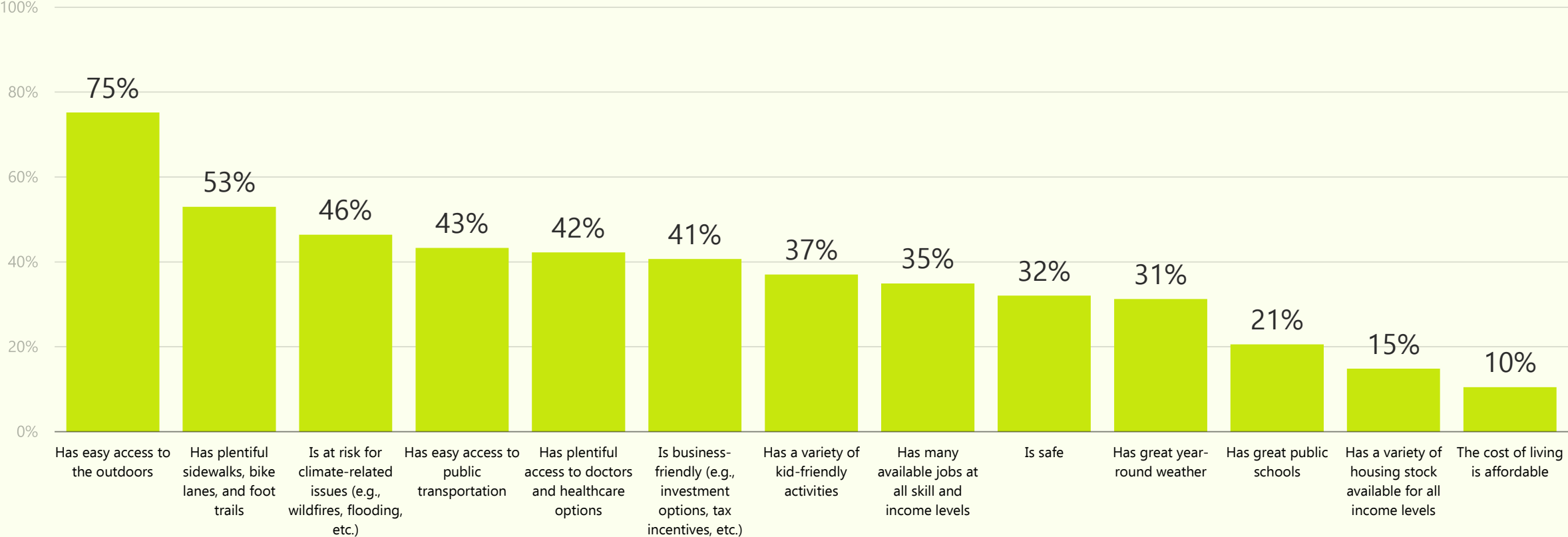
Question: Thinking one year ahead, how do you expect your personal quality of life to change?
 Base: 2024 Washoe County residents. 400 completed surveys.

The vast majority of residents agree that Washoe County has easy access to the outdoors (75%).

Plentiful sidewalks/bike lanes/foot trails (53%) are also considered an asset. Just under half agree that Washoe County offers easy public transportation (43%), plentiful healthcare options (42%), and business-friendliness (41%). However, being at risk for climate-related issues (46%) remains a top concern.

Washoe County Assets

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



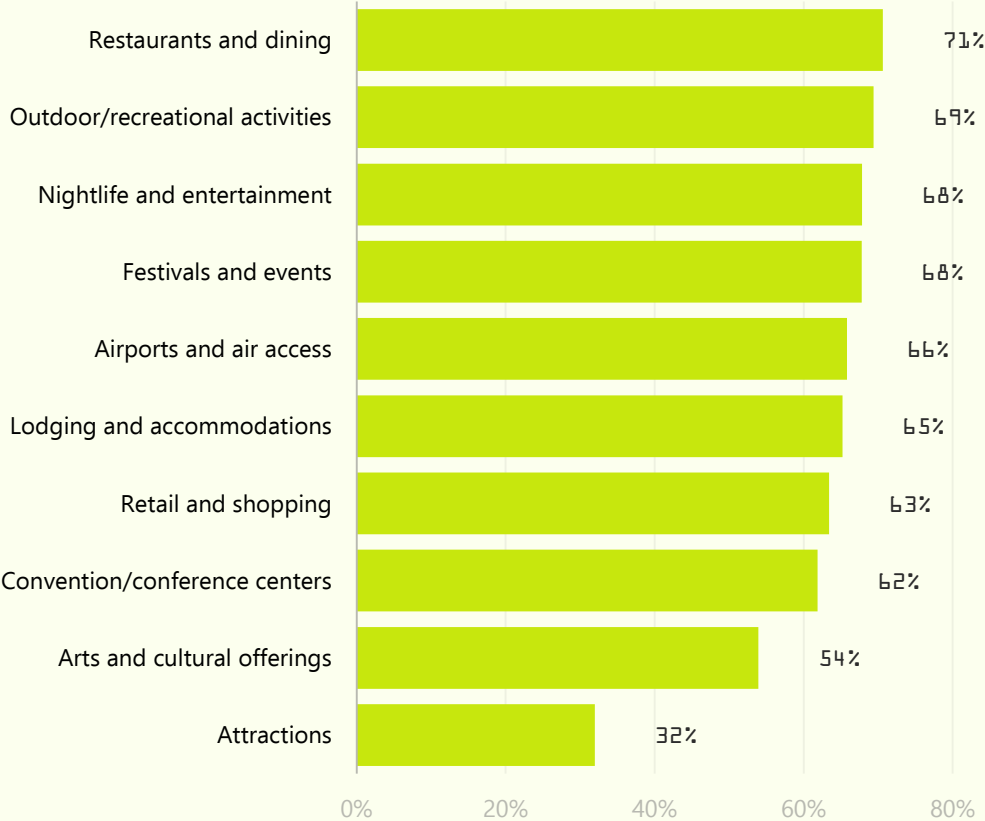
Question: Please rate how much you agree or disagree with the following statements as it relates to Washoe County.

Base: Total Washoe County residents 2024. 400 completed surveys.

Residents highly rate Washoe County’s dining, outdoor activities, entertainment and events.

Over two-thirds of all residents surveyed rated these tourism offerings “good” or “very good.” Infrastructure, including air support (66%), accommodations (65%), retail/shopping (63%), and conferencing options (62%) are also highly rated. Meanwhile, attractions are the relatively lowest rated asset at 32%.

Washoe County Assets
(Top 2 Box - % selecting "4 - Good" or "5 – Very good")



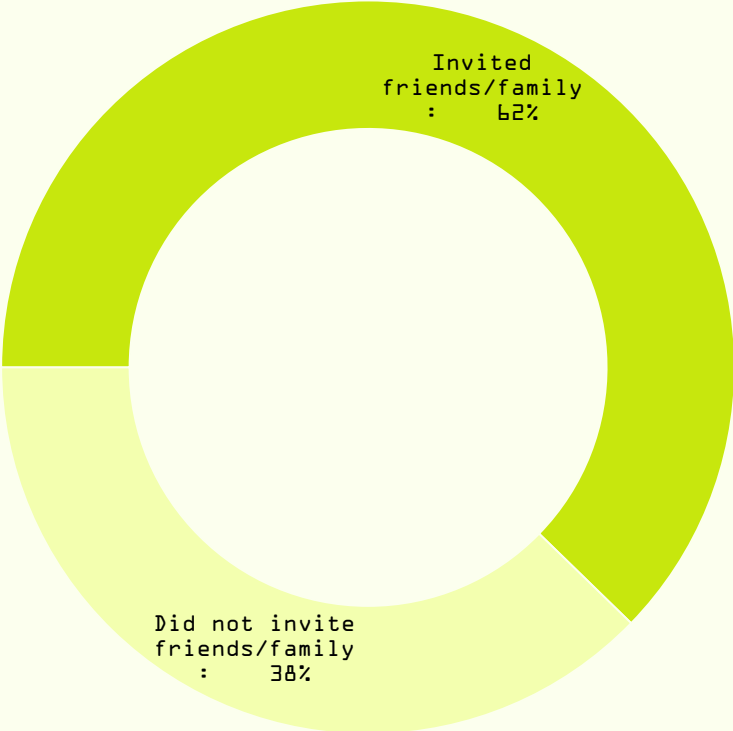
Detail by Tourism Employment

	Total	Currently Working in Tourism Industry	Not Working in Tourism Industry
Restaurants and dining	71%	53%	74%
Outdoor/recreational activities	69%	62%	71%
Nightlife and entertainment	68%	60%	69%
Festivals and events	68%	58%	69%
Airports and air access	66%	62%	67%
Lodging and accommodations	65%	53%	67%
Retail and shopping	63%	58%	64%
Convention/conference centers	62%	63%	62%
Arts and cultural offerings	54%	47%	55%
Attractions	32%	31%	32%
Base	400	61	339

Question: To the best of your knowledge, please rate the quality of Washoe County’s tourism offerings.
Base:2024 Washoe County residents. 400 completed surveys.

Nearly two-thirds of residents have invited out-of-state friends or family to visit them in the past year (62%).

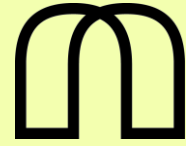
Invited Friends and Family to Visit



Detail by Tourism Employment

	Total	Currently Working in Tourism Industry	Not Working in Tourism Industry
Invited friends/family	62%	73%	60%
Did not invite friends/family	38%	27%	40%
Base	400	61	339

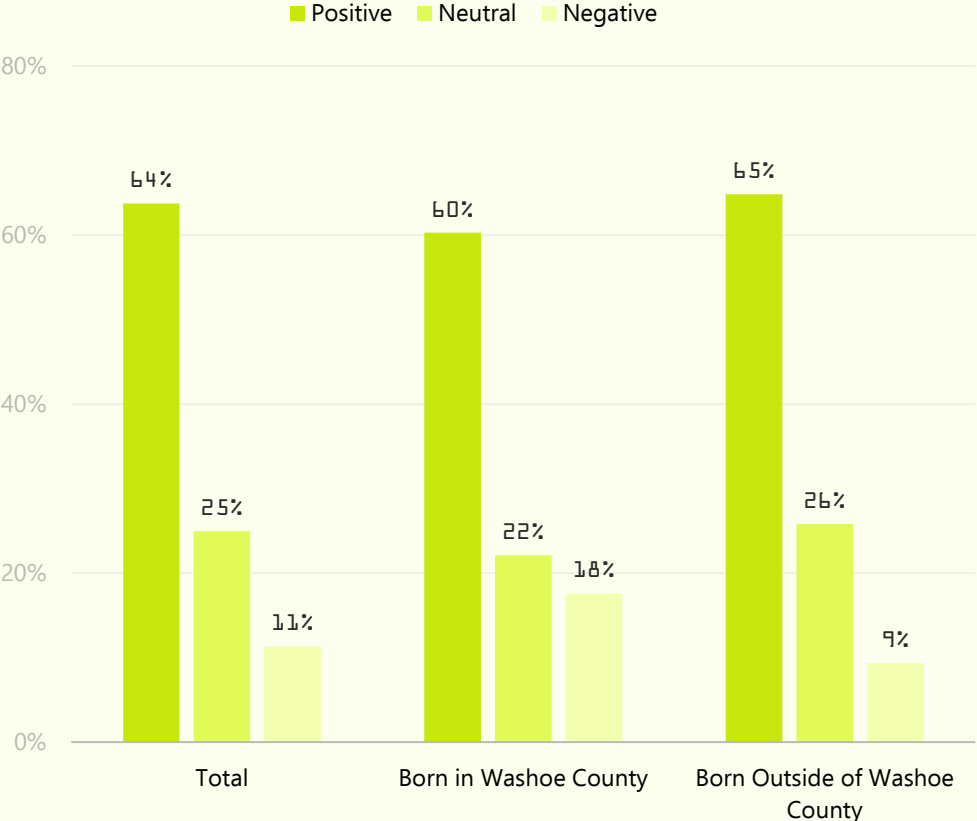
Question: Have you invited out-of-state friends and/or family to visit you in the past 12 months?
Base: 2024 Washoe County residents. 400 completed surveys.



Detailed Findings: Tourism Industry Sentiment

About two-thirds of Washoe County residents have positive perceptions of Nevada’s statewide tourism industry (64%).

Statewide Tourism Industry Perceptions



Detail by Place of Birth

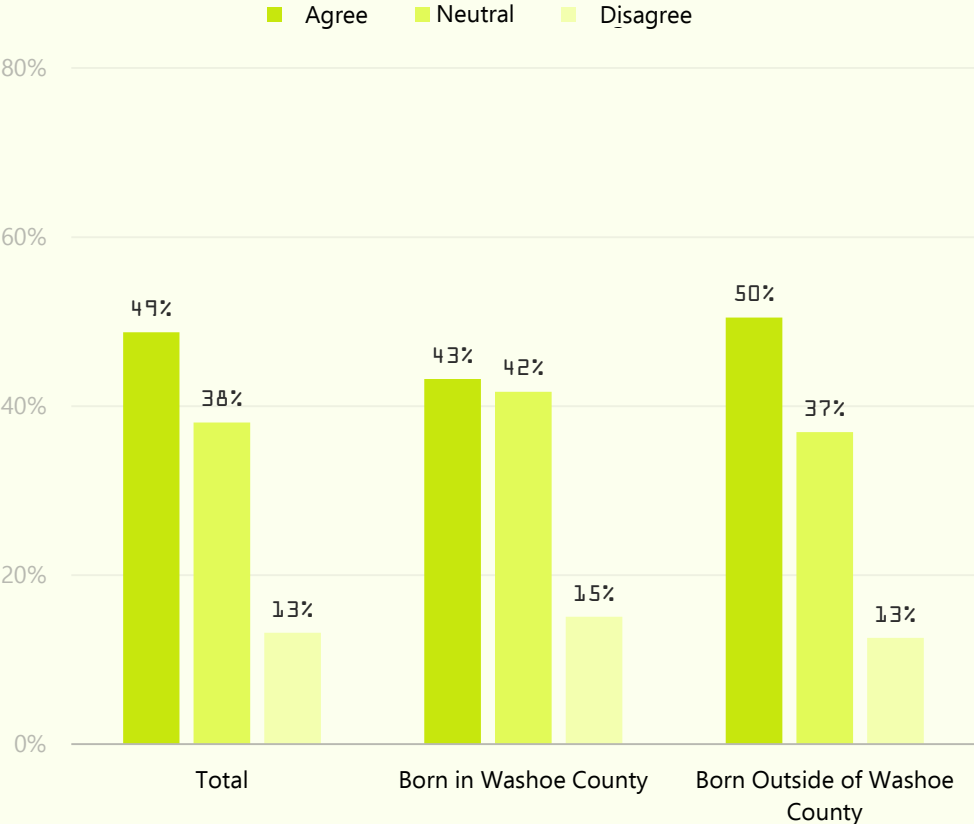
	Total	Born in Washoe County	Born Outside of Washoe County
Top 2 Box	64%	60%	65%
Extremely positive	17%	13%	18%
Somewhat positive	47%	47%	46%
Neutral	25%	22%	26%
Somewhat negative	10%	16%	8%
Extremely negative	1%	2%	1%
Base	400	97	303

Question: In general, what are your overall perceptions of Nevada’s tourism industry?
 Base: 2024 Washoe County residents. 400 completed surveys.

Half of Washoe County residents surveyed agree that the state’s tourism industry results in a better quality of life (49%).

This level of agreement is higher amongst residents born outside of the County compared to native residents (50% vs. 43%).

Statewide Tourism Impact on Quality of Life



Detail by Place of Birth

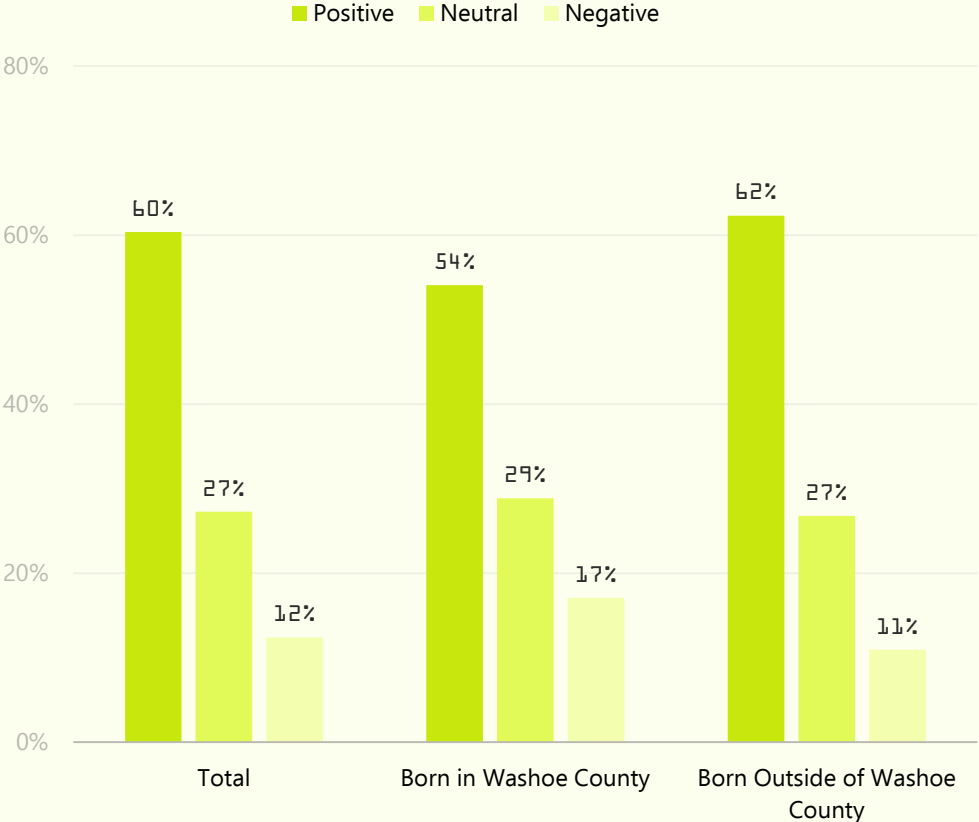
	Total	Born in Washoe County	Born Outside of Washoe County
Top 2 Box	49%	43%	50%
Strongly agree	11%	14%	10%
Agree	38%	29%	41%
Neutral	38%	42%	37%
Disagree	8%	7%	9%
Strongly disagree	5%	8%	4%
Base	400	97	303

Question: Please rate how much you agree or disagree with the following statement:
Overall, Nevada’s tourism industry results in a better quality of life for me and my family.
 Base: 2024 Washoe County residents. 400 completed surveys.

More than half of residents surveyed perceive Washoe County’s local tourism industry positively (60%).

Again, a larger share of transplants born outside of the County view the local tourism industry positively than natives (62% vs. 54%).

Community Tourism Industry Perceptions



Detail by Place of Birth

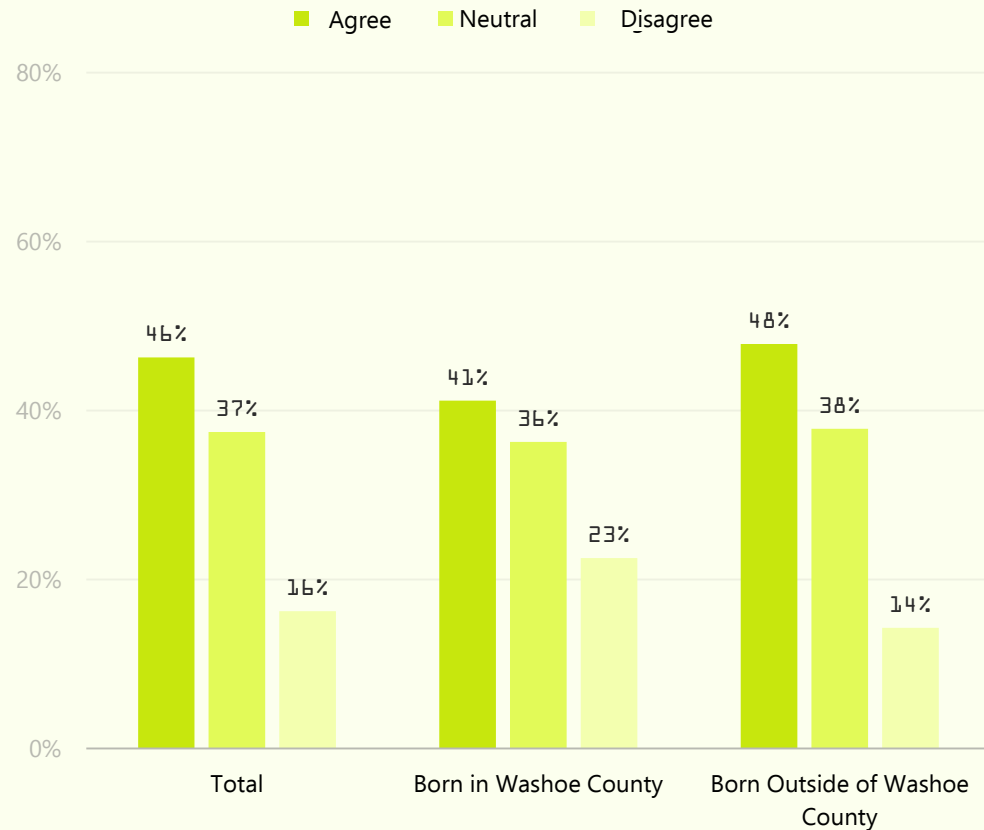
	Total	Born in Washoe County	Born Outside of Washoe County
Top 2 Box	60%	54%	62%
Extremely positive	14%	14%	14%
Somewhat positive	47%	40%	48%
Neutral	27%	29%	27%
Somewhat negative	11%	15%	10%
Extremely negative	1%	2%	1%
Base	400	97	303

Question: In general, what are your overall perceptions of Washoe County’s tourism industry?
 Base: 2024 Washoe County residents. 400 completed surveys.

Similar to the level of agreement that the state's tourism industry results in a better quality of life, about half of residents agree that Washoe County's local tourism industry results in a better quality of life for them and their family (46%).

As has been the trend, a higher percentage of transplants agree compared to native residents (48% vs. 41%).

Community Tourism Impact on Quality of Life



Detail by Place of Birth

	Total	Born in Washoe County	Born Outside of Washoe County
Top 2 Box	46%	41%	48%
Strongly agree	10%	10%	10%
Agree	36%	31%	38%
Neutral	37%	36%	38%
Disagree	12%	16%	11%
Strongly disagree	4%	6%	4%
Base	400	97	303

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.

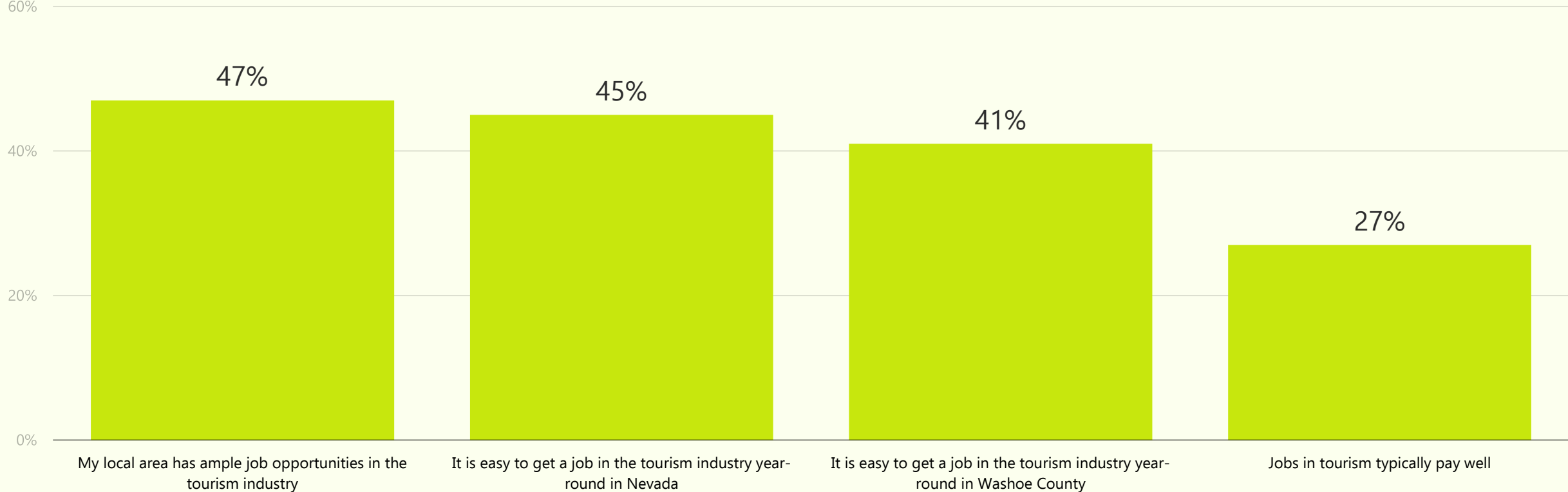
Base: 2024 Washoe County residents. 400 completed surveys.

Approximately half of Washoe County residents agree that the local tourism industry provides ample job opportunities (47%).

However, residents feel that it's easier to get a job in the tourism industry year-round statewide (45%) than locally (41%). Only a quarter agree that tourism jobs pay well (27%).

Tourism Industry Impact on Jobs

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

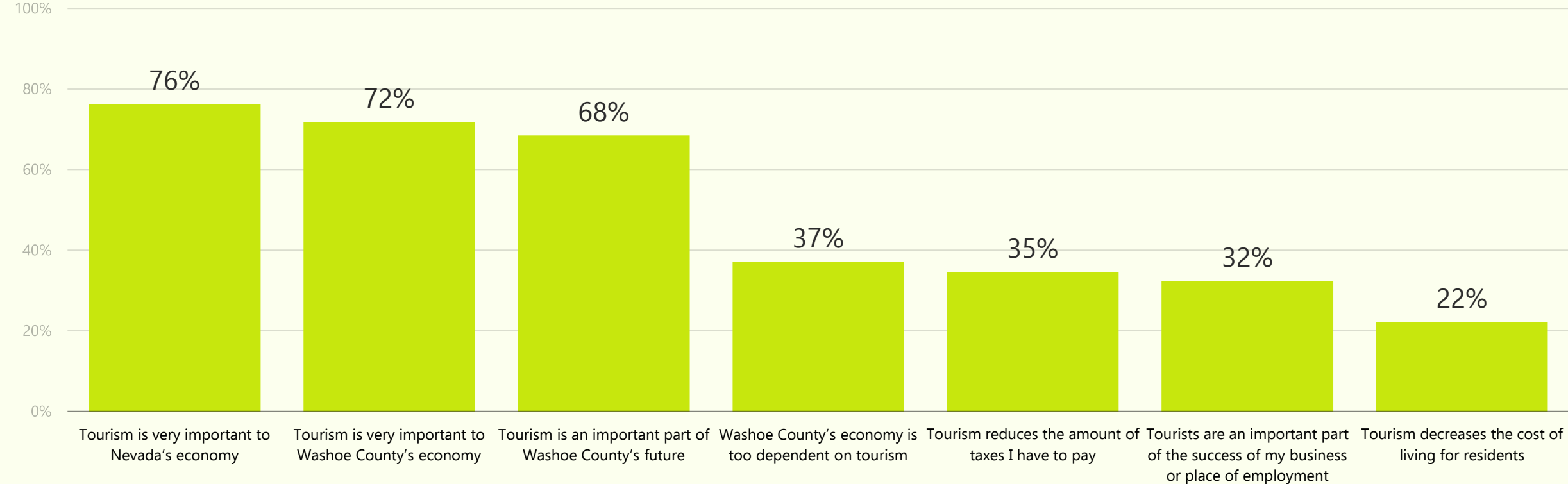


Question: Thinking about tourism and its impact on jobs, please rate how much you agree with the following statement using a five-point scale in which "1" represents "Strongly disagree" and "5" represents "Strongly agree."

Most residents surveyed believe tourism is important to the economies of both the state (76%) and the county (72%) and consider tourism important to the county's future (68%).

However, over one-third of residents feel that Washoe County's economy is too dependent on tourism (37%).

Tourism Industry Impact on Economy
(Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")



Question: Thinking about tourism and its impact on the economy, please rate how much you agree with the following statement using a using a five-point scale in which "1" represents "Strongly disagree" and "5" represents "Strongly agree."

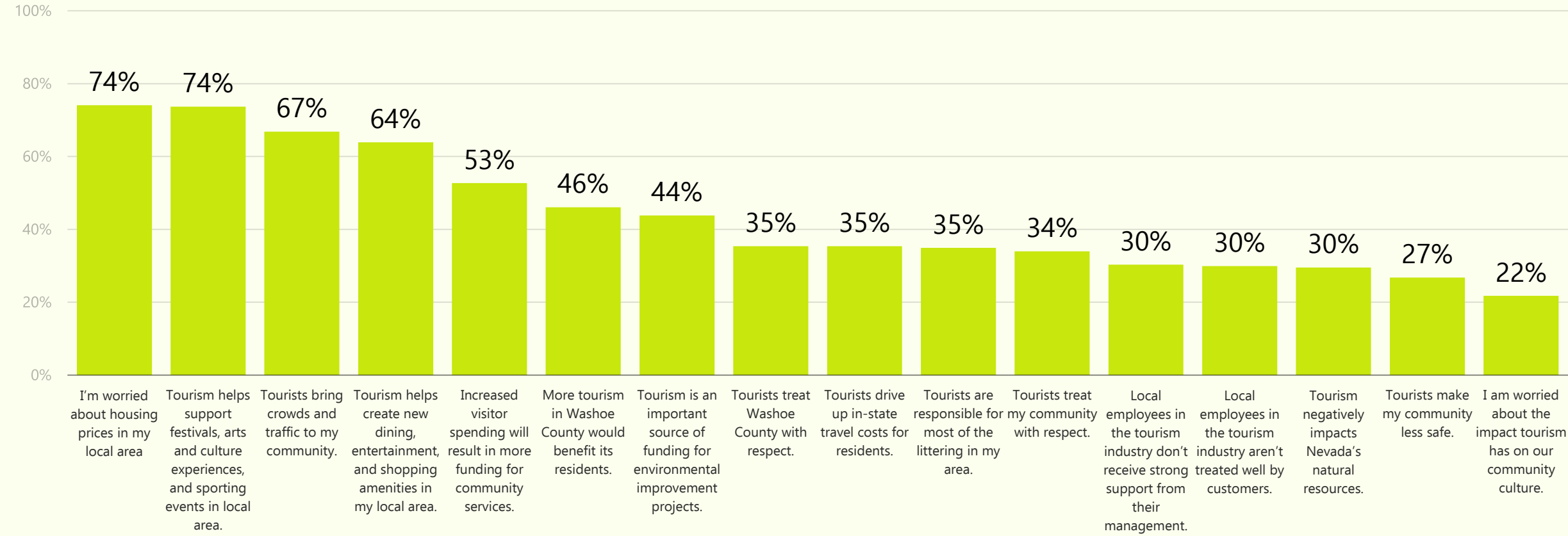
Base: Total Washoe County residents 2024. 400 completed surveys.33

The top impacts of tourism on the community illustrate the need for balance between opposing viewpoints.

Three-quarters of Washoe County residents worry about housing prices (74%), however the same percentage of residents acknowledge tourism’s support of local experiences and events (74%). Similarly, they feel that tourism causes crowds and traffic (67%), yet they also agree that tourism creates new dining, entertainment and shopping opportunities in the community (64%).

Tourism Industry Impact on Community

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

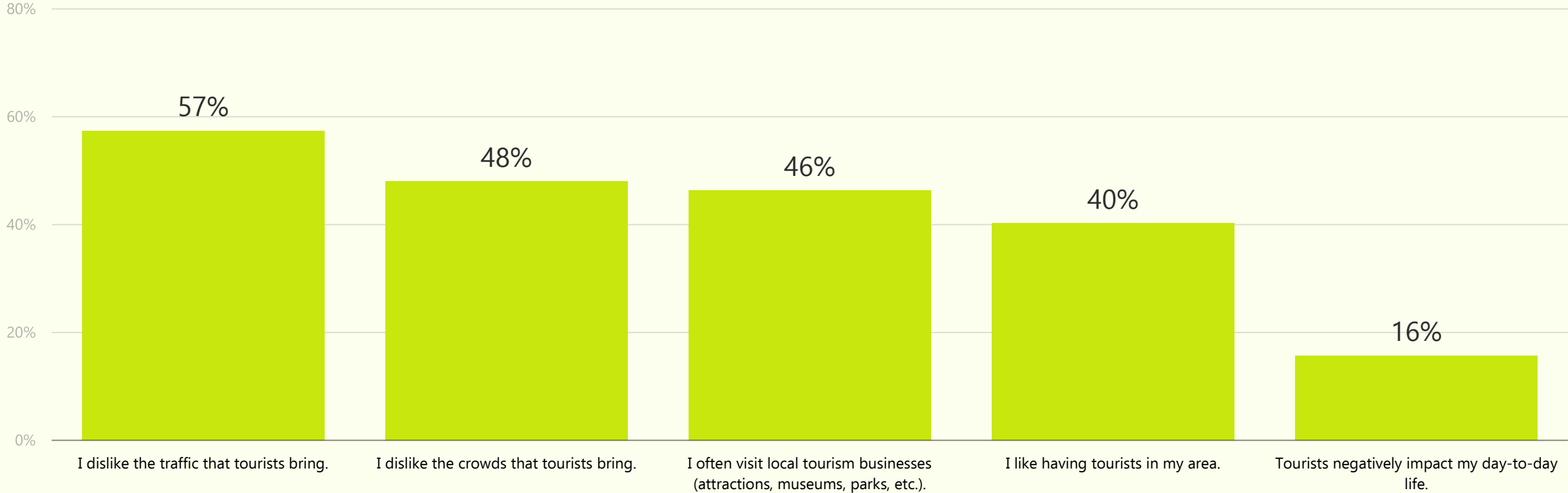


Question: Thinking about tourism and its impact on your community, please rate how much you agree with the following statement using a using a five-point scale in which "1" represents "Strongly disagree" and "5" represents "Strongly agree."

Around half of Washoe County residents dislike the traffic (57%) and crowds (48%) caused by tourism.

On the other hand, they also take advantage of the local tourism businesses (46%) and like having tourists in the area (40%). Overall, relatively few agree that tourism negatively impacts their daily life (16%).

Tourism Industry Personal Impact
(Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")



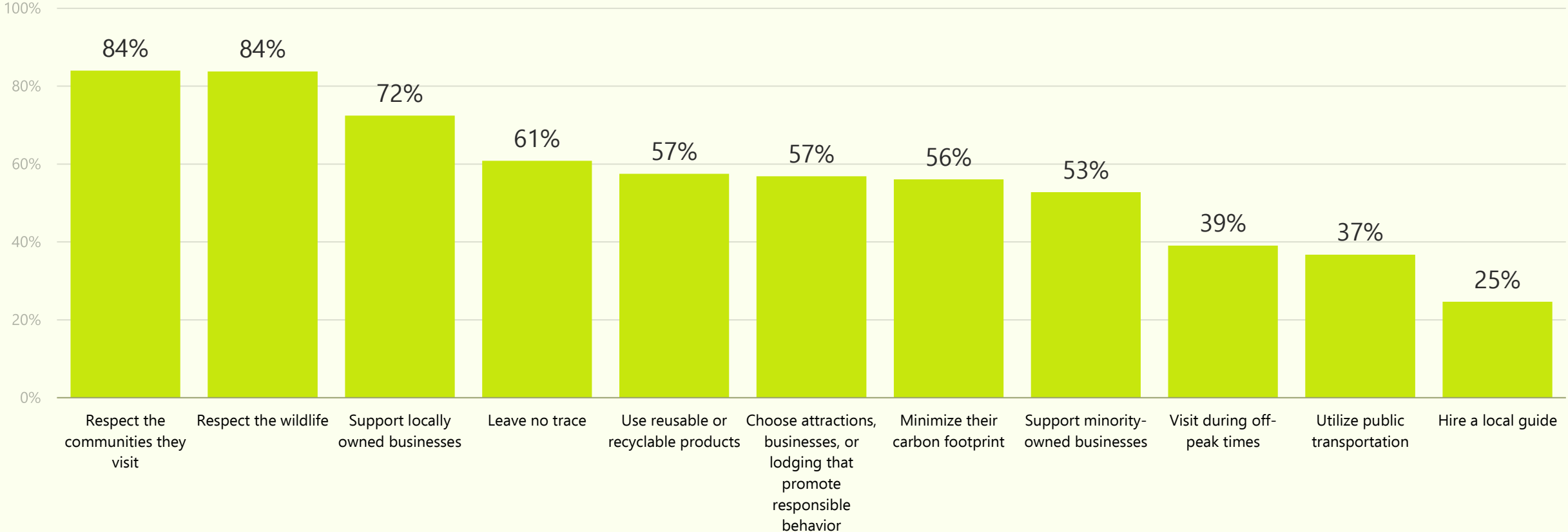
Question: Thinking about tourism and its impact on you personally, please rate how much you agree with the following statement using a using a five-point scale in which "1" represents "Strongly disagree" and "5" represents "Strongly agree."

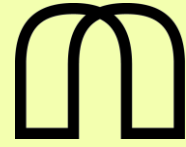
A decisive majority of residents agree that it is important for tourists be respectful of the area.

Specifically, to respect the communities they visit (84%), respect the wildlife there (84%), and leave no trace (61%). Three-quarters also agree that it's important for tourists to support locally owned businesses (72%).

Important Tourist Behaviors

(Top 2 Box Importance - % selecting "4 – Very important" or "5 – Extremely important")

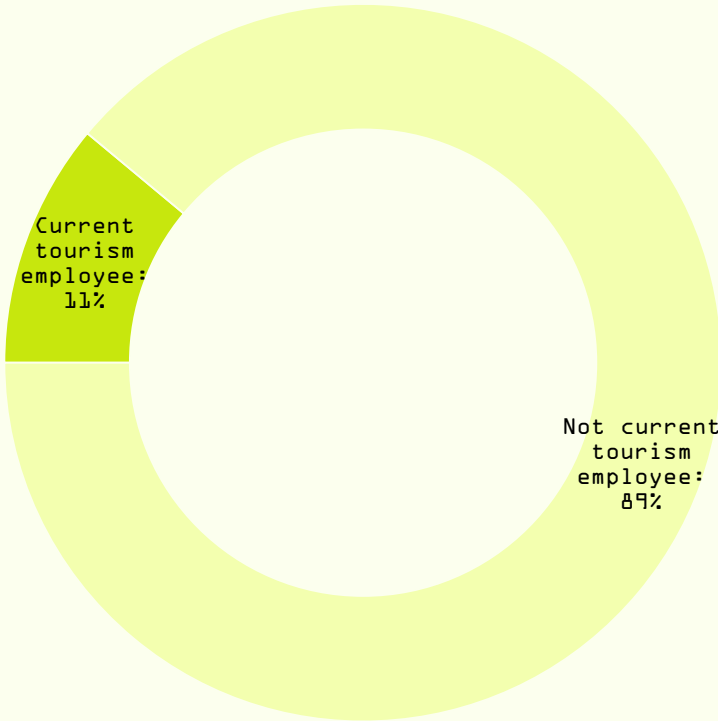




Detailed Findings: Tourism Employment

One-in-ten Washoe County employees are currently employed by a tourism industry business (11%).

Current Employment in the Tourism Industry



Detail by Place of Birth

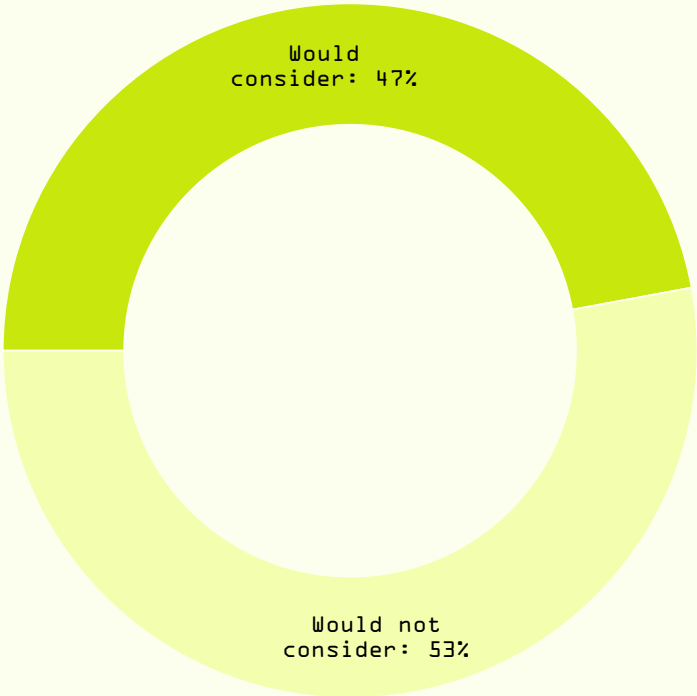
	Total	Born in Washoe County	Born Outside of Washoe County
Current tourism employee	11%	12%	11%
Not current tourism employee	89%	88%	89%
Base	380	88	292

Question: Are you currently employed by a business/company that serves Washoe County’s tourism industry?
 Base: 2024 Washoe County residents that are not tourism industry business owners. 380 completed surveys.

About half of Washoe County residents who do not currently work in tourism would consider future work in the tourism industry (47%).

Transplants are more open to tourism work (49%) than natives (40%).

Consider Employment in Tourism Industry



Detail by Place of Birth

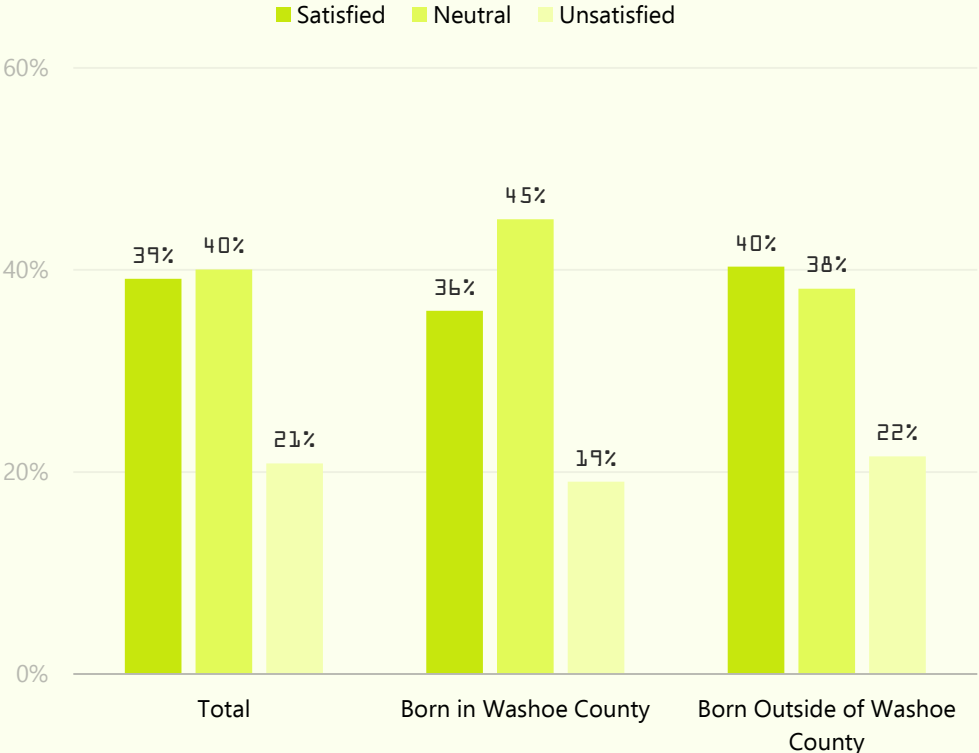
	Total	Born in Washoe County	Born Outside of Washoe County
Would consider tourism in future	47%	40%	49%
Would not consider tourism in future	53%	60%	51%
Base	339	78	261

Question: Would you ever consider working in Washoe County’s tourism industry in the future?
 Base: 2024 Washoe County residents not currently working in the tourism industry. 339 completed surveys.

There’s an even split amongst tourism employed Washoe County residents who are satisfied and neutral with working in the industry.

About 40 percent of county residents who work in the tourism industry rate their satisfaction a top-two box score (39%) or neutral (40%). Meanwhile, one-in-five report being “somewhat” or “not at all” satisfied with working in the county’s tourism industry (21%).

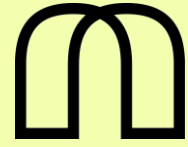
Satisfaction with Local Tourism Industry Employment



Detail by Place of Birth

	Total	Born in Washoe County	Born Outside of Washoe County
Top 2 Box	39%	36%	40%
Extremely satisfied	10%	13%	9%
Very satisfied	29%	23%	31%
Moderately satisfied	40%	45%	38%
Somewhat satisfied	15%	14%	16%
Not at all satisfied	5%	5%	5%
Base	156	43	113

Question: How would you rate your overall satisfaction with working in Washoe County’s tourism industry?
 Base:2024 Washoe County residents that work employees/business owners in the tourism industry. 156 completed surveys.



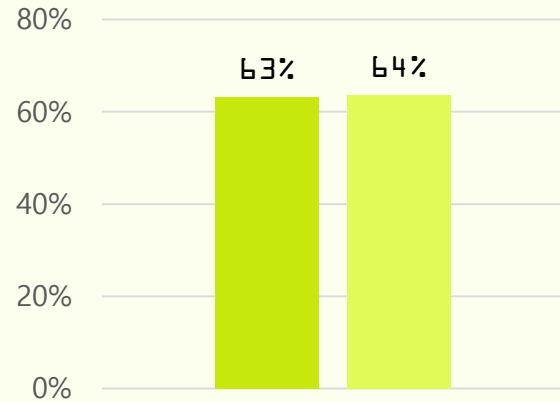
Appendix: Historical Comparison

Tourism Industry Sentiment: CY 2023 vs CY 2024

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

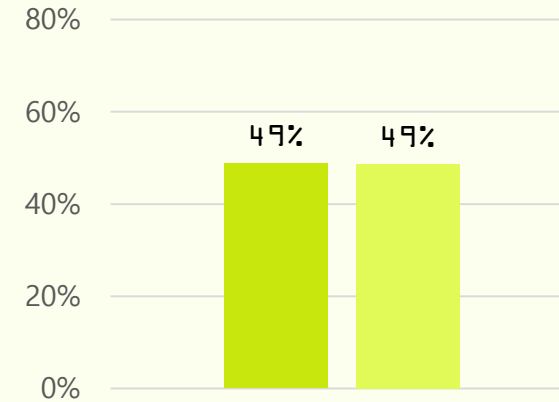
Perceptions of Nevada's Tourism Industry

(Top 2 Box - % selecting "4 – Somewhat positive" or "5 – Extremely positive")



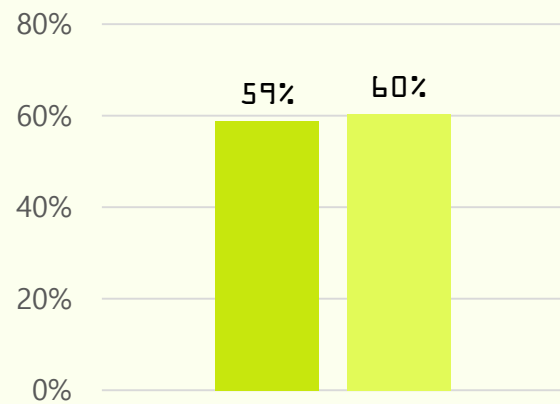
Impact of Nevada's Tourism Industry on Quality of Life

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



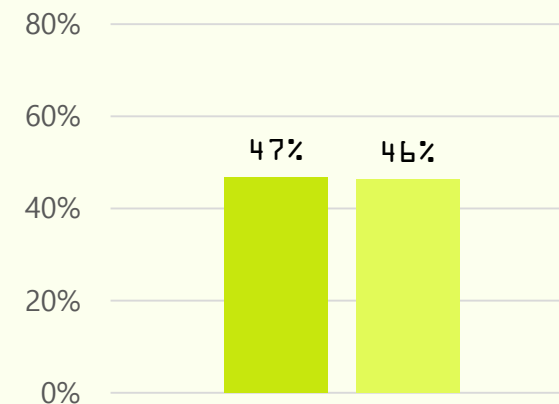
Perceptions of Washoe County's Tourism Industry

(Top 2 Box - % selecting "4 – Somewhat positive" or "5 – Extremely positive")



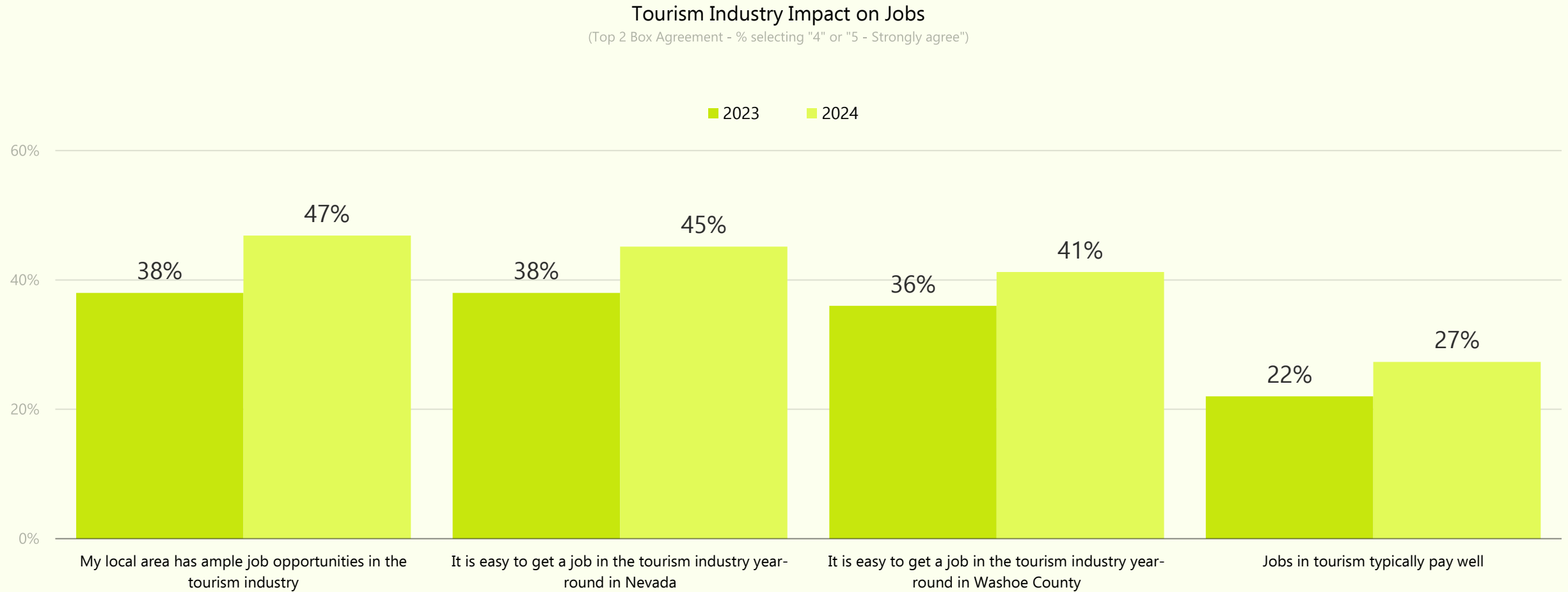
Impact of Washoe County's Tourism Industry on Quality of Life

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



Tourism Industry Sentiment: CY 2023 vs CY 2024

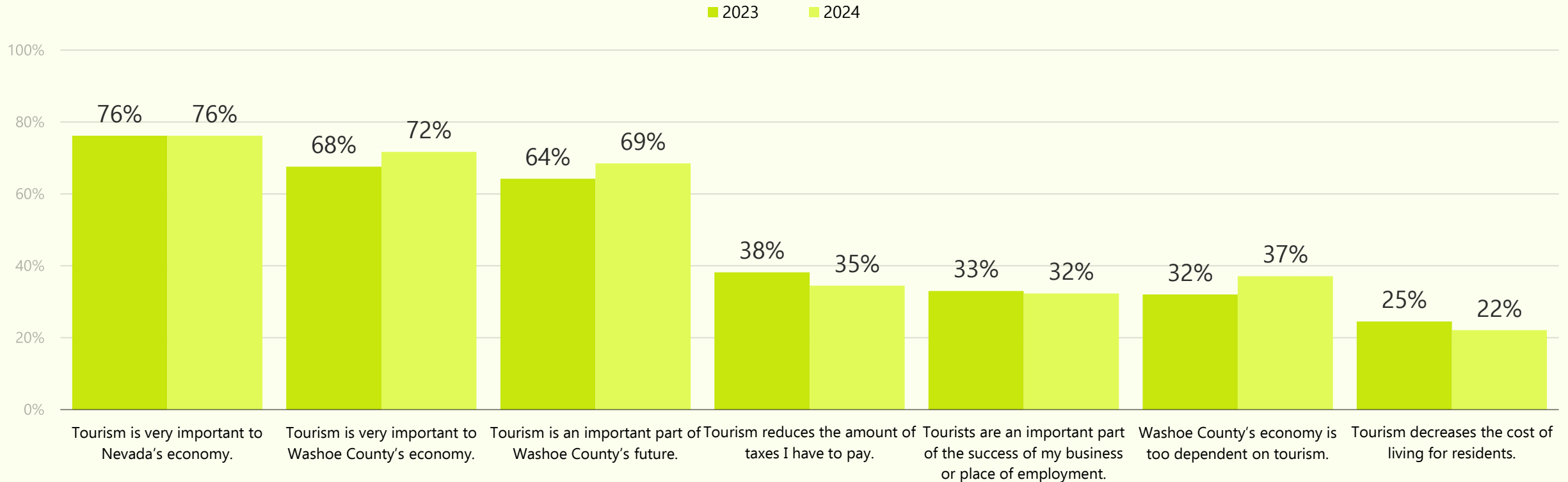
These data points should be considered informational and not directional given methodological differences in survey design and data collection.



Tourism Industry Sentiment: CY 2023 vs CY 2024

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

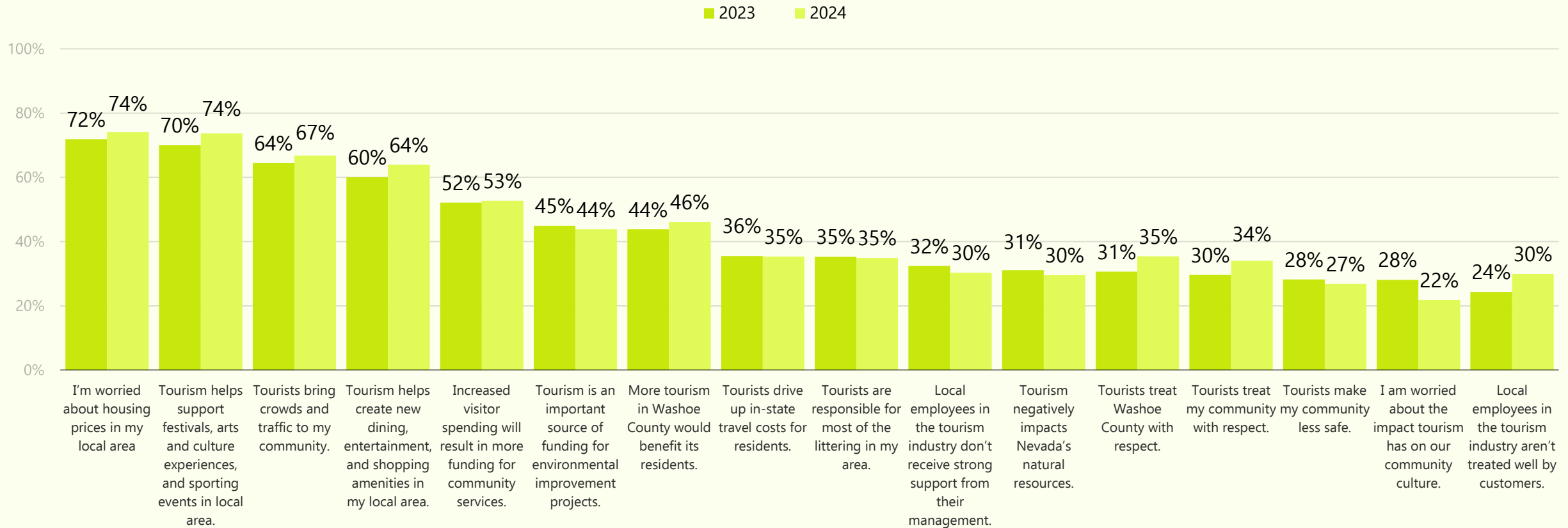
Tourism Industry Impact on Economy
(Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")



Tourism Industry Sentiment: CY 2023 vs CY 2024

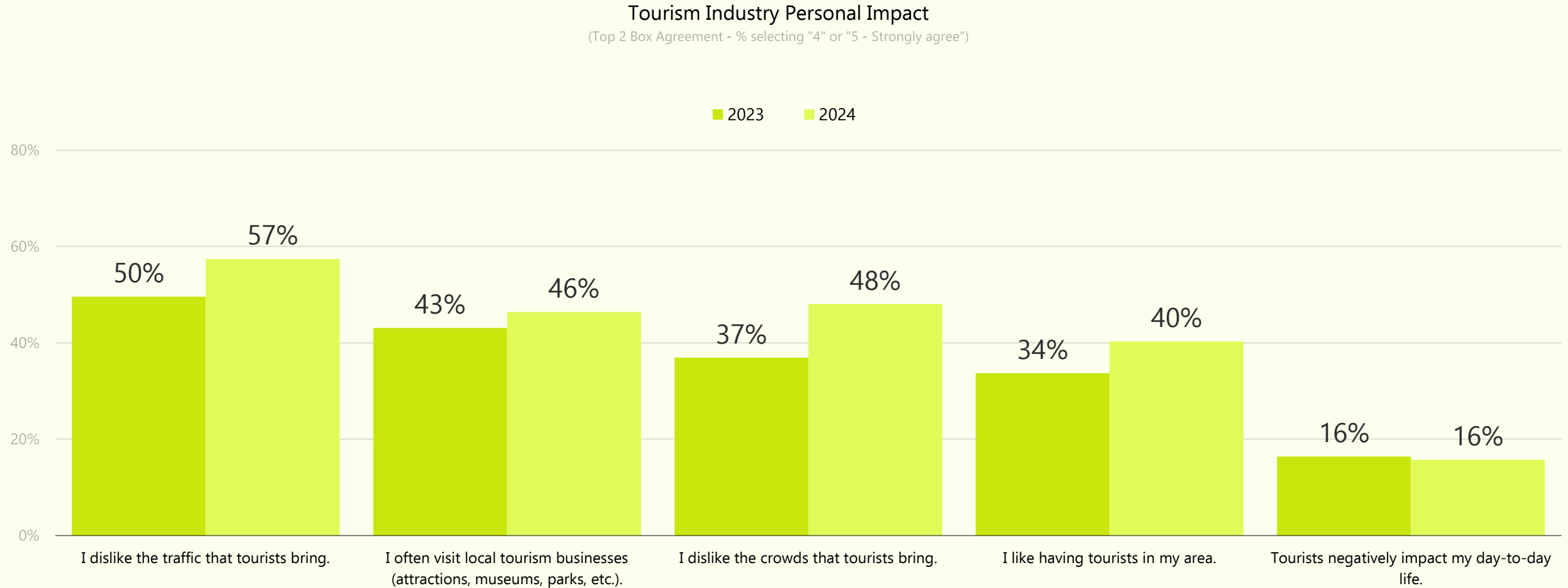
These data points should be considered informational and not directional given methodological differences in survey design and data collection.

Tourism Industry Impact on Community
 (Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")



Tourism Industry Sentiment: CY 2023 vs CY 2024

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



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Thank You!