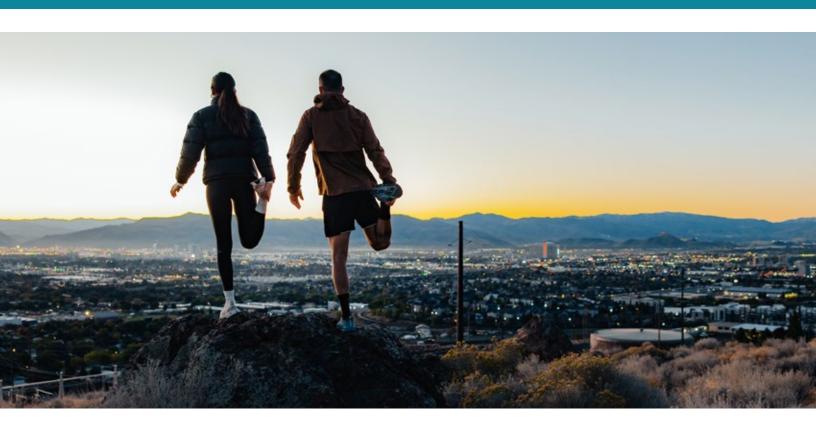


# Visit Reno Tahoe Annual Plan 2025 2026





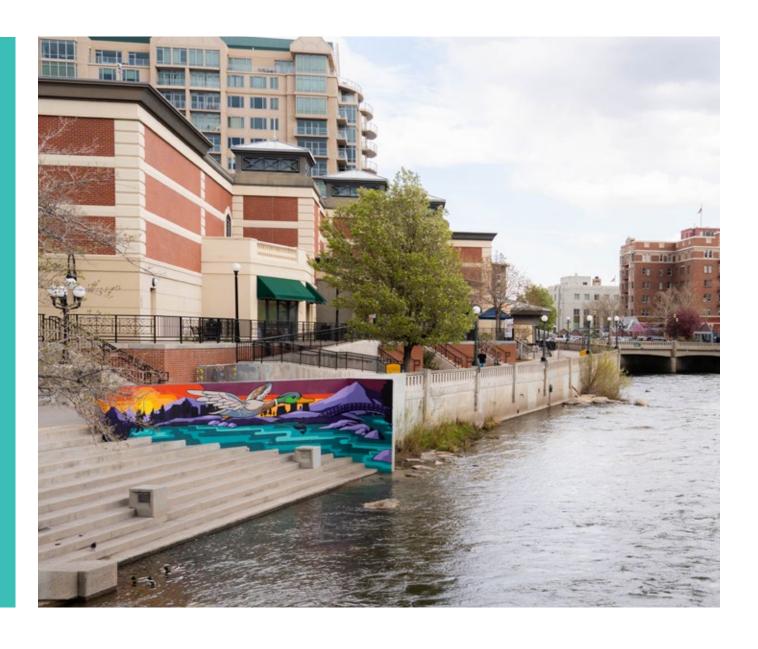


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Visit Reno Tahoe exists for the sole purpose of sustaining and strengthening the Northern Nevada economy by generating overnight visitation to Washoe County lodging properties. For those of us fortunate enough to represent our home and this great destination, it is our privilege and responsibility to invite millions of travelers to experience the endless possibilities of Reno, Sparks, Lake Tahoe, Pyramid Lake, and the Sierra Nevada. And it is our role not only to inspire visitation, but to ensure that we are delivering on promised experiences, enhancing economic opportunities, and nurturing the Reno Tahoe customer of the future.

Tourism does not happen in a vacuum. Encouraging travelers to choose your destination requires thoughtful promotion. Delivering on sales efforts, pursuing large groups, and driving innovative marketing campaigns in a highly competitive space takes expertise. Success in travel hinges on passionate people who get the job done, but is largely impacted by an array of variables outside of one's direct control: outdoor amenities, hotel rooms, restaurants, retail, weather, and transportation, just to name a few.

These considerations are all part of the booking journey and the effort to inspire someone to visit Reno Tahoe just once, but our goals for sustained, repeat visitation are much bigger than that. Visit Reno Tahoe's mission to support the sustainable development of our communities demands partnership and collaboration, and we are focused on actions that will help us meet that promise.

Visit Reno Tahoe is committed to activating entertainment venues, welcoming visitors and residents to a modern, inviting urban landscape. We are working to build and support new and existing events that bring people together for unforgettable experiences. We are educating visitors about their role in maintaining our natural resources, and we are encouraging everyone to treat Northern Nevada as if it were their home.

This plan is a call for community collaboration. Visit Reno Tahoe is dedicated to engaging community partners in service to our visitors, and to being a champion for improving the quality of life for our friends and neighbors. Success is only possible through the continued partnership of our many regional stakeholders. We have the people. We have the product. And we are forever grateful to be a part of this wonderful destination, so supportive and so in love with what it means to live in Reno Tahoe.

Mike Larragueta President and CEO Visit Reno Tahoe

## MISSION

# Attract overnight visitors to Reno Tahoe while supporting the sustainable growth of our communities.

#### **VALUES**

# **Collaboration**

We seek out internal and external perspectives, emphasizing an inclusive approach.

# Integrity

We always keep our word and do the right thing.

# **Transparency**

We share information to create open and honest communication.

# **Ambition**

We put in the hard work to enhance the quality of life for visitors and all Northern Nevada residents.

# **People**

We invest in the diverse experience and expertise of individuals who positively impact the communities we serve.



## PURPOSE

Each year Visit Reno Tahoe develops and publishes an integrated annual plan that outlines the goals, strategies and tactics that work in unison to deliver on our strategic vision. The individual strategies and tactics within the plan are measured, optimized and reported to the Board of Directors on an ongoing basis.

#### STATE OF THE INDUSTRY

# International Uncertainty Shifting Focus to Domestic Travel

**53%**Of Americans plan to travel in Summer 2025.
-Deloitte

3.1

Million travelers were screened at U.S. security checkpoints, June 22, 2025. The most ever in a single day.

-TSA

79%
Of America's highest earners are planning leisure travel in 2025.
-MMGY

Despite global international arrivals fully recovering and surpassing 2019 figures for the first time since the pandemic in 2024, legislation, economic uncertainty, and shifting international sentiments have recently changed the outlook for travel and tourism going forward in 2025. What was originally projected to be a strong year for travel following the continued trend of recovery, has now been hindered by the aforementioned obstacles. Heightened uncertainty has led to declining forecasts for travel that especially impact international inbound travel to North America and domestic travel.

The effects of recent economic policy are already visible in the industry, with Canadian travel to the US by land and air down 38.2%, and 24.2%, respectively in May 2025. Noticeable declines such as this forced a change in Tourism Economics' international arrivals forecast, originally expected to increase 9% year-over-year, international arrivals are expected to now fall 8% compared to 2024. This forecasted annual decline is primarily driven by a 20% decline in inbound arrivals from Canada and a 3% decline from overseas arrivals.

Despite the macro-economic and industry specific headwinds, resiliency can be found in domestic travel for the upcoming summer season. According to Deloitte's annual Summer Travel Survey, 53% of Americans plan to travel during summer 2025, the highest percentage of positive respondents since the pandemic. Macro-economic factors are still being felt, however, as the majority of positive respondents planned on making changes toward shortening length of stay, and downgrading accommodations to ensure affordability. A similar study by Future Partners revealed that 60% of respondents in April claimed leisure travel over the next three months was a priority for them, despite the same survey finding respondents have less confidence in their household finances.







The latest industry-wide data signals mixed results across various tourism sectors. US hotel performance year-over-year remained flat, with occupancy declining less than one percent to 65.3%, and ADR and RevPAR both climbing less than one percent to \$163 and \$104 respectively. National figures convey the trend of normalizing demand patterns and fading growth rates that propelled the industry to a speedy recovery following the pandemic. TSA throughput in May was down 1.7% year-over-year, though still 6.2% above 2019 levels. For calendar year 2025 through May, national TSA throughput was less than one percent below 2024 levels, despite the headwinds facing travel in 2025. June TSA data show initial signs of promise, recording the single busiest day in the agency's history on June 22nd, screening nearly 3.1 million passengers.

The latest macro-economic data provides some positive outlooks despite uncertainty still clouding travelers' inflation expectations and economic outlook. June's job report exceeded expectations, adding over 147,000 non-farm jobs and lowering the unemployment rate to 4.1%. Inflation rose slightly in May to 2.4%, down from 3.3% compared to the same period last year. The increases, primarily seen in the price of groceries, were slightly offset by declining fuel prices, which often proves to be a tailwind for leisure demand. Inflation expectations remain high due to the aforementioned obstacles and administrative policy, though consumer sentiment in June improved for the first time in six months.

According to the most recent MMGY Portrait of the American Traveler (Q2 2025), intent for leisure travel has been highly affected across all income brackets nationwide. Approximately 79% of the highest earners (\$250k+ households) are planning leisure travel in the next six months, down from 91% in the previous quarter, while only 39% of survey respondents in the lowest income bracket (\$<50k households) have plans to travel, down from 56% in the previous quarter. Such marked changes from just the beginning of the year further reveal the uncertainty travelers and consumers are facing.

As evidenced by both industry performance and traveler sentiment, the travel and tourism industry has begun to show signs of easing compared to the growth rates driven by "pent-up" demand in recent years. Additional obstacles in 2025 have come in the form of macro-economic headwinds that have casted uncertainty on the industry outlook going forward. While the upcoming summer travel season is showing signs of variable and wavering demand, indicators are still strong for growth in the travel and tourism sector through the coming years.

## **Key Findings from the 2024 Past and Potential Visitor Profile Study**

#### WHO: We're Attracting a Higher-Quality Visitor



## BOOMER AND MILLENNIAL AUDIENCES CONTINUE TO SHOW STRONG ENGAGEMENT

**Data Point:** The average age of the Reno Tahoe visitor is 46.8, which remains consistent to 2023.

**Action:** Our messaging continues to resonate with Millennials and Boomers alike – two audiences with both disposable income and strong travel intent. Continue targeted messaging to Millennials to further capture market share in this key growth demographic.



#### NOTABLE INCREASE IN HOUSEHOLD INCOME

**Data Point:** The average household income for the Reno Tahoe visitor increased to \$102,859 in 2024, compared to \$97,039 in 2023.

**Action:** Campaigns are successfully attracting a higher-earning visitor who is more likely to stay longer and spend more.

Continue to target travelers with a household income above \$100K.



#### A MORE INCLUSIVE VISITOR BASE

Data Point: 21% of our visitors identify as BIPOC, and 1 in 10 of visitors identify as LGBTQ+.

**Action:** Prioritize showcasing diverse voices to foster a destination brand that reflects a wide range of perspectives.



#### A SHIFT IN FAMILY TRAVEL

**Data Point:** One in four traveled to Reno Tahoe with their children in 2024 compared to one in three in 2023.

**Action:** Maintain strategic balance, support family offerings while investing in emerging high-value segments.

WHAT: Gaming, Arts, Outdoors, Events and Festivals, and Valuable Experiences



#### OUTDOORS GAINING SHARE AS A PRIMARY DRIVER

**Data Point:** Visitors were motivated to travel to Reno Tahoe primarily by gaming and outdoors activities, including Lake Tahoe.

**Action:** Visitors increasingly associate Reno Tahoe with outdoor adventure. Continue reinforcing outdoor narratives, while maintaining visibility for gaming to retain this legacy draw.



#### PERCEPTIONS OF VALUE HOLD STEADY

**Data Point:** While value is a top decision driver, just two-thirds of 2024 visitors felt they received good value for their money in Reno Tahoe, similar to the level witnessed in 2023.

**Action:** Value perception remains positive but has room to grow. Elevate the desiation's uniqueness by showcasing authentic, only-in-Reno Tahoe experiences and diversity of the destination.



#### **EVENT AND FESTIVALS PRESENT A GROWTH OPPORTUNITY**

**Data Point:** Events, festivals and professional sporting events are valued by visitors but have significant room for growth as core destination attributes, with 59% and 27% of recent visitors rating Reno Tahoe highly on these attributes, respectively. Only 9% of 2024 visitors attended an event or festival, and 6% attended a live sporting event.

**Action:** Expand promotional efforts around iconic events and festivals to build equity and awareness to increase visitor participation.

HOW: Spontaneous Planning, Higher Spend, and Elevated Satisfaction



#### **VISITORS ARE SPENDING MORE**

**Data Point:** Daily spend was \$224 in 2023 and \$273 among overnight visitors in 2024.

**Action:** Target marketing towards travelers with greater discretionary income and longer potential length of stay.



#### **SHORT PLANNING WINDOW**

**Data Point:** 86% of Reno Tahoe visitors plan their trip less than two months before they arrive.

**Action:** Spontaneity is a key behavior among our target audiences. Capitalize on this short booking window with conversion-focused messaging and short-lead campaigns.



#### BRAND MESSAGING IS RESONATING

**Data Point:** 80% describe Reno Tahoe as vibrant and fun (up from 74% in 2023); 74% say it's a place to "live life to the fullest".

**Action:** The No Limits platform continues to shape strong, aspirational brand perceptions. Maintain and evolve the current brand voice to build on this momentum.



#### HIGH TRIP SATISFACTION AND RETURN INTENT

Data Point: 8 in 10 report satisfaction and likelihood to return.

**Action:** Destination development efforts, loyalty and positive word-of-mouth have had a positive effect on the visitor experience. Consider increased emphasis on repeat visitors using a CRM messaging strategy given their propensity to return



#### INCREASE AIR LIFT

**Data Point:** 73% of visitors in 2024 arrived via car, compared to 22% by plane.

**Action:** Air travelers remain a high-value audience. Prioritize air service markets development and campaigns that entice visitors from further away who will stay longer and spend more.

# **Taxable Room Revenue - Washoe County**

	Actual		Budget
Month	FY 23-24	FY 24-25	FY 25-26
July	\$53,454,177	\$49,457,885	\$47,209,398
August	\$53,576,718	\$55,845,967	\$50,917,421
September	\$54,934,713	\$43,216,655	\$40,603,665
October	\$34,630,171	\$36,554,764	\$34,707,512
November	\$26,799,571	\$26,026,566	\$24,766,410
December	\$30,148,834	\$30,807,312	\$29,317,235
January	\$27,128,665	\$31,041,768	\$30,155,594
February	\$31,231,814	\$30,142,129	\$29,001,800
March	\$31,513,251	\$32,609,477	\$31,186,021
April	\$39,797,914	\$41,883,438	\$39,373,092
May	\$35,914,540	\$37,859,614	\$37,189,860
June	\$46,450,359	\$43,899,284	\$47,237,454
Totals	\$465,580,729	\$459,344,860	\$441,665,462

# **Taxable Room Revenue - All Market Segments**

FY 23-24

**-1.3%**Taxable Room Revenue from FY 2023-2024

**Budget FY 25-26** 



FY 24-25

# **Cash Occupied Room Nights - Washoe County**

	Actual		Budget
Month	FY 23-24	FY 24-25	FY 25-26
July	328,661	314,421	306,709
August	315,116	331,510	319,864
September	324,722	293,103	287,296
October	262,219	271,762	267,906
November	213,812	206,826	204,851
December	222,944	226,440	221,431
January	203,817	221,931	222,129
February	221,899	214,736	213,794
March	240,671	248,498	241,810
April	256,080	267,013	266,703
May	254,372	263,887	265,881
June	312,180	293,836	319,912
Totals	3,156,493	3,153,963	3,138,287

# **Cash Occupied Room Nights - All Market Segments**

-0.1%
Cash Occupied Room
Nights from FY 2023-2024



# **Average Daily Rate - Washoe County**

	Actual		Budget
Month	FY 23-24	FY 24-25	FY 25-26
July	\$162.64	\$157.30	\$153.92
August	\$170.02	\$168.46	\$159.18
September	\$169.17	\$147.45	\$141.33
October	\$132.07	\$134.51	\$129.55
November	\$125.34	\$125.84	\$120.90
December	\$135.23	\$136.05	\$132.40
January	\$133.10	\$139.87	\$135.76
February	\$140.75	\$140.37	\$135.65
March	\$130.94	\$131.23	\$128.97
April	\$155.41	\$156.86	\$147.63
May	\$141.19	\$143.47	\$139.87
June	\$148.79	\$149.40	\$147.66
Average	\$147.50	\$145.64	\$140.73

# **Average Daily Rate - All Market Segments**

**-1.3%**Average Cash Rates from FY 2023-2024



### BACKGROUND

The Visit Reno Tahoe senior staff and the Board of Directors recently completed a comprehensive, three-year strategic plan, outlining new organizational goals and actionable initiatives. In its inaugural year, this plan reinforces Visit Reno Tahoe's intent to coordinate with partner organizations supporting the ongoing development of Washoe County and the State of Nevada as leading tourism destinations. Recognizing a shared vision for success that is embraced beyond tourism, the plan pushes for positive change and development that benefits all.







## **Key Trends & Implications:**

- Major private investments are poised to add capacity and elevate the destination.
- A new generation of travelers remote workers, digital nomads, and bleisure (business + leisure) visitors – seek destinations that blend work, play, and purpose. They prioritize experiences, connectivity, wellness, and authenticity over traditional packaged tourism.
- Travel has skewed toward domestic and drive-market visitors, with increased migration from California bringing more visitors and business relocations.
- Local, state, and federal economic uncertainty may limit revenue growth and visitor spend.
- Environmental awareness is reshaping tourism behavior. Travelers prioritize eco-conscious destinations, healthy experiences, and wellness integrations.
- The presentation of "downtown" is crucial to initial visitor impressions, brand equity, and convention appeal.
- Tech-savvy travelers rely on digital planning tools, Al-powered recommendations, and personalization.
- Stakeholders want to build on Reno Tahoe's heritage like events such as Reno Rodeo, Hot August Nights, Great Reno Balloon Race – not constantly reinvent.

Armed with this new strategic framework, the 25/26 Annual Business Plan sets in motion specific strategies and tactics aimed at advancing the outlined initiatives. Find a complete version of the Visit Reno Tahoe Fiscal Year 25/26 - 27/28 Strategic Plan at RSCVA.com.



**ANNUAL PLAN INITIATIVES & TACTICS** 

# FY25/26 goals have been strategically bucketed into four pillars



**Urban Core Revitalization** 



**Visitor** Access



**Venue Activation** & Event Attraction



Organization
Sustainability &
Performance



# **#1 Urban Core Revitalization**

Be a strong advocate to make a difference in our urban centers creating vibrant spaces for visitors and the community to live, work, and play.

#### **What Success Will Look Like:**

- Community collaboration to make strides in improving the Downtown District and Truckee River corridor.
- Clean, vibrant Reno & Sparks downtowns that integrate the river as a central feature, offering recreational and aesthetic value.
- An urban core that provides a mix of outdoor activities, gaming, dining, and cultural experiences for a memorable quest experience.

#### **Our Role:**

**Drive** use of the Reno Events Center and National Bowling Stadium for events.

**Advocate** for transformation projects with regional partners.

**Support** visitation by marketing assets, providing parking solutions, and elevating the Visitor Center experience.

# **#1: Urban Core Revitalization**

INITIATIVES	TACTICS	ACTIONS	
Advocate for an activated, vibrant downtown	Support more events in the downtown core Engage with associations doing the work in downtown	Identify and support at least six key events in the greater downtown area, defining creative needs and generating assets  Quarterly meetings with various community stakeholders, e.g. City of Reno, City of Sparks, Downtown Reno Partnership, Riverwalk District, MidTown District, 39 North, Reno Brewery District	
Fully utilize the river as a tourism asset	Advocate for river infrastructure improvements  Prioritize promoting the river as a key asset of our region	Partner with local organizations to educate visitors on improvements, such as RTC's progress on the Arlington Bridges project and its impact on future events  Develop and promote a digital Truckee River Guide, including walkability and urban river experiences	
Make it easier for visitors to experience Reno Tahoe	Develop a parking solution at the National Bowling Stadium  Activate Greater Nevada Field as a promotion platform  Drive traffic to the Reno Tahoe Visitor Center  Activate public spaces for events	Activate public parking at the NBS garage to support events and attractions in downtown  Connect visitors to Visit Reno Tahoe planning resources through onsite promotional campaigns at Greater Nevada Field  Develop a minimum of two marketing activations to drive traffic to the Visitor Center, and incorporate Visitor Center promotions throughout venues  Develop and install signage at major events and festivals within the urban core	



# #2 Venue Activation & Event Attraction

Reno Tahoe is known for hosting diverse events, including concerts and major festivals, to maximize visitor engagement.

#### **What Success Will Look Like:**

- Modern, upgraded venues that attract high-profile events.
- Venues are fully utilized, balancing midweek and seasonal lulls.
- Pursuing opportunities to drive new festivals, concerts, and events throughout the region.

#### **Our Role:**

**Drive** event bookings in all Visit Reno Tahoe venues & throughout the destination.

**Advocate** for infrastructure improvements near events venues.

# **#2: Venue Activation & Event Attraction**

INITIATIVES	TACTICS	ACTIONS
Enhance RSLEC venue attractiveness through facility updates	Execute capital improvements with State budget  Maintain and occupy venue through concentrated event attraction	Engage the State of Nevada to contract and complete improvements, including grandstand repair, utility vehicles, trailers, tractors, forklift, restroom remodel, and more  Book 30 livestock and equine events
Activate REC with concerts and other events	Consistently bring events and entertainment to support the venue and surrounding businesses  Secure 15 concerts  Maintain and improve the venue through capital expenditures	Host 35 events  Lead the booking of six at-risk concerts  Procure new lighting and sound system, staging, pipe and drape, VIP bar in suite concourse, furniture for dressing room
Maintain & moderately expand RSCC track and convention business	Leverage existing event production momentum by contracting local and national meetings & tradeshows, while actively integrating events secured by the venue sales team into the production pipeline  Improve Food & Beverage experience  Maintain and improve the venue through capital expenditures	Host 235 events  Work closely with F&B provider to monitor menus and quality, analyze customer reviews, increase communication, and regularly review revenue and budgets  Improve Wi-Fi, purchase bleachers and track equipment, replace skylights and 500-ton chiller, upgrade digital display assets, install electronic key system and new carpet for ballroom

# **#2: Venue Activation & Event Attraction**

INITIATIVES	TACTICS	ACTIONS
Creatively activate the National Bowling Stadium	Maximize venue production, considering USBC Open Championships  Activate Kingpin Club, Theater and Stadium Club, find additional revenue streams  Maintain and improve the venue through capital expenditures	Host 70 events  Create packaging to promote and book 30 events incorporating the Kingpin Club, Theater and Stadium Club, lease the "museum" space  Install new carpet in the theater and renovate Stadium Club
Attract regional events in our target categories – arts & culture, food & beverage, sports, and music	Establish new events attracting overnight visitation  Build upon successful events	Launch two festivals and execute a running race series  Secure Banana Ball event in an effort to attract annual productions





# **#3 Visitor Access**

# Visitors have easy access to local attractions and venues throughout Reno Tahoe

#### **What Success Will Look Like:**

- Maintained and enhanced air lift, with a focus on routes from regional hubs.
- Walkable spaces in heavily trafficked areas.
- Increased options for visitors to practice sustainable travel in the region.

## **Our Role:**

**Support** partnerships in air service development with legacy carriers.

**Advocate** for increased shared transportation ridership, using our marketing reach.

**Advocate** for tourism infrastructure in high-traffic areas.

# **#3: Visitor Access**

INITIATIVES	TACTICS	ACTIONS
Support air service development	Focus marketing resources  Engage regional stakeholders  Take a targeted approach to RTX programming	Maintain Air Service Development Fund, launch a campaign aimed at attracting and/or maintaining air service  Work with RTAA, RASC and regional part- ners to promote Reno-Tahoe International Airport directly to airline representatives  Host a minimum of one FAM incorporating air service decision-makers
Enable sustainable access to and from the Lake	Increase awareness, and ridership, of transportation options to and around Lake Tahoe	Utilize newsletters, digital marketing and public relations programming to promote the North Lake Tahoe Express, as well as various, seasonal rideshare activations, such as the Emerald Bay Shuttle project
Be the voice of the visitor in getting around the community	Brand activations at Reno-Tahoe International Airport Identify needs in the visitor transportation experience	Enhance the sense of arrival by immediately introducing visitors to Reno Tahoe through co-branded RTAA promotions and signage, guiding travelers to online resources related to events, activities, attractions and lodging  Work with RTC to relay the visitor experience, identifying relevant solutions to better serve the Reno Tahoe visitor of the future



# #4 Organization Sustainability & Performance

Visit Reno Tahoe is known for operational excellence, transparency, and community leadership.

#### What Success Will Look Like:

- A cohesive team culture, avoiding overextension of staff.
- Team stays focused on core mission activities without distraction.
- Regional stakeholders are actively engaged and bought into the success of the region.
- Maintained fiscal stewardship of public funds.

#### **Our Role:**

**Drive** development, capabilities, and satisfaction of Visit Reno Tahoe staff.

**Drive** responsible financial programming.

**Convene** and engage regional stakeholders in contributing to the success of the region.

# **#4: Organization Sustainability & Performance**

INITIATIVES	TACTICS	ACTIONS
Support employee engagement	Implement New Employee Orientation program  Develop an employee information/human resources communication program	Develop NEO, coordinating leadership appearances/interaction, conducting employee surveys and adapting content  Publish a quarterly newsletter, addressing personnel-specific topics, such as benefits and policy
Advance organizational capabilities	Launch an internal Learning Management System Update and implement harassment training program	Develop LMS and ensure appropriate employees receive necessary training  Ensure that 100% of current employees attend harassment prevention training, and that new employees receive training in a timely manner

# **Performance Scorecard**

KPI	FY25	FY26 TARGET	FY27 TARGET	FY28 TARGET
Cash Room Nights	3,153,963	3,138,287	3,232,435	3,329,408
Taxable Room Revenue	\$459,344,860	\$441,665,462	\$454,665,462	\$468,562,887
Average Daily Rate	\$145.64	\$140.43	\$144.64	\$148.98
Direct Visitor Spend (Calendar Year)	\$3.35 Billion	+3%	+3%	+3%
Group Room Nights	284,563	282,523	290,999	299,729
Tourism Room Nights	696,699	687,223	700,967	714,986
Number of Events at Venues	405	415	430	449
Venues Client Satisfaction	91.7%	92%	92.5%	93%
Enhanced Engaged Website Sessions	707,436	733,080	755,072	777,724
Paid Media Engagement Rate	17.1%	10%	10%	10%
Earned Media Placements	275	215	225	235
Community Engagement Activities	48	30	35	40
Resident Favorability of Tourism	60%	63%	65%	67%
Training Completed	100%	100%	100%	100%
Employee Satisfaction Rate	96%	96%	96%	96%
Workplace Happiness Metrics Response Rate	75%	75%	80%	80%

# Board Members

Hillary Schieve, Chair

**Cortney Young, Vice Chair** 

**Stephen Ascuaga, Secretary/Treasurer** 

**Alexis Hill, Board Member** 

**Charlene Bybee, Board Member** 

**Greg Long, Board Member** 

Glenn Carano, Board Member

John East, Board Member

**Eddie Ableser, Board Member** 







