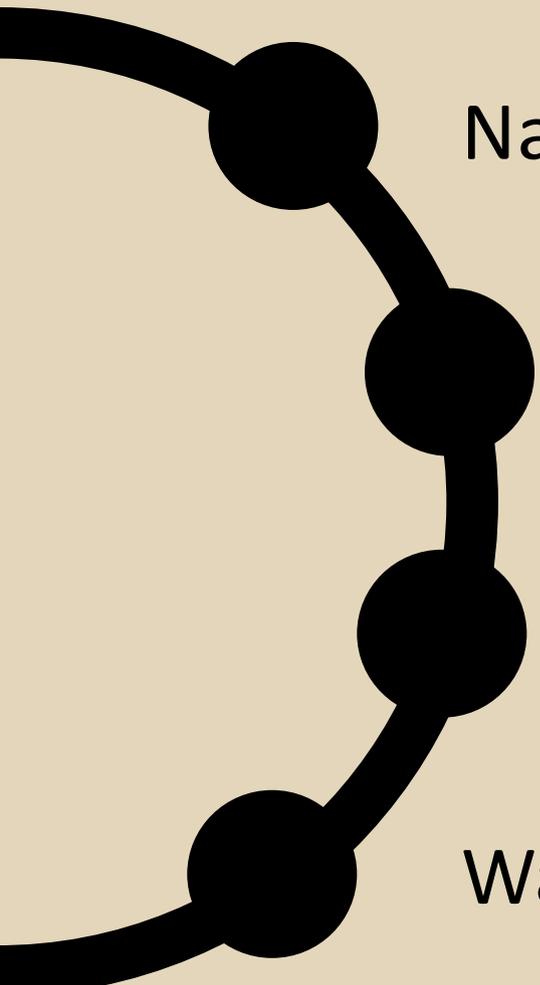




Visit Reno Tahoe
Destination Research
2025

Today's Agenda



National Traveler Trends

Reno Tahoe Visitor Profile

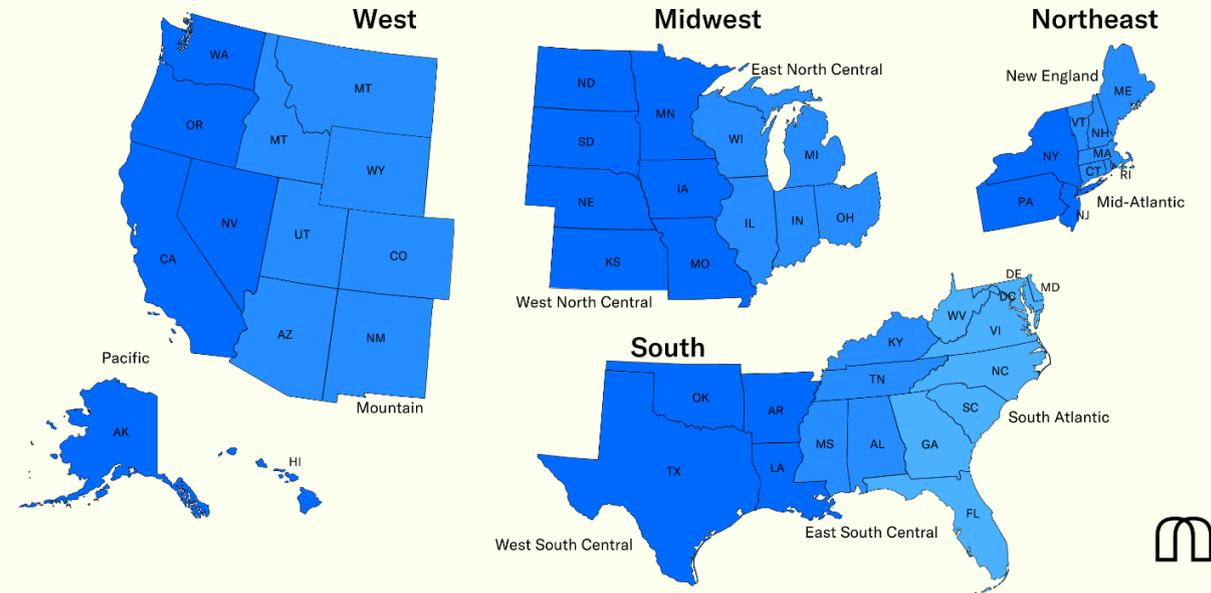
Reno Tahoe Brand & Ad Tracking

Washoe County Resident Sentiment

The State of the American Traveler

- Monthly tracking survey
- Tracks traveler sentiment to generate insights into domestic travel trends
- Survey collected: [February 2026](#)
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.55%
- Representative sample of adult American travelers in each of the four U.S. regions
- Data is weighted to reflect the actual population of each region

United States Census Regions and Divisions

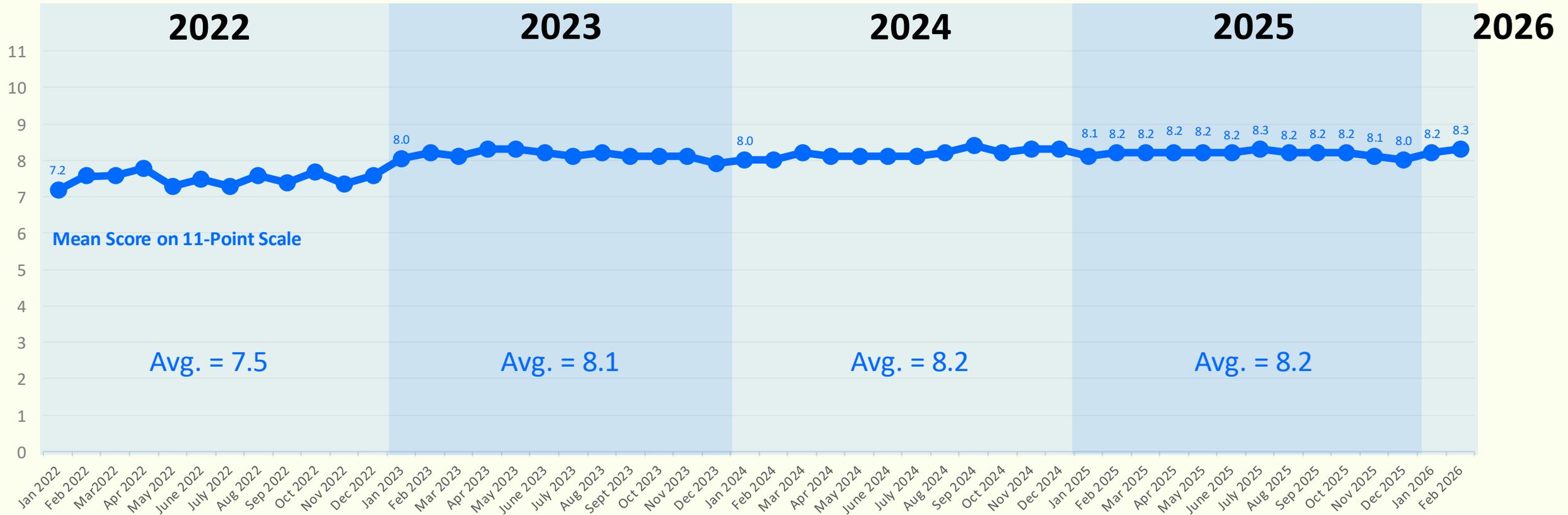


Travel Sentiment



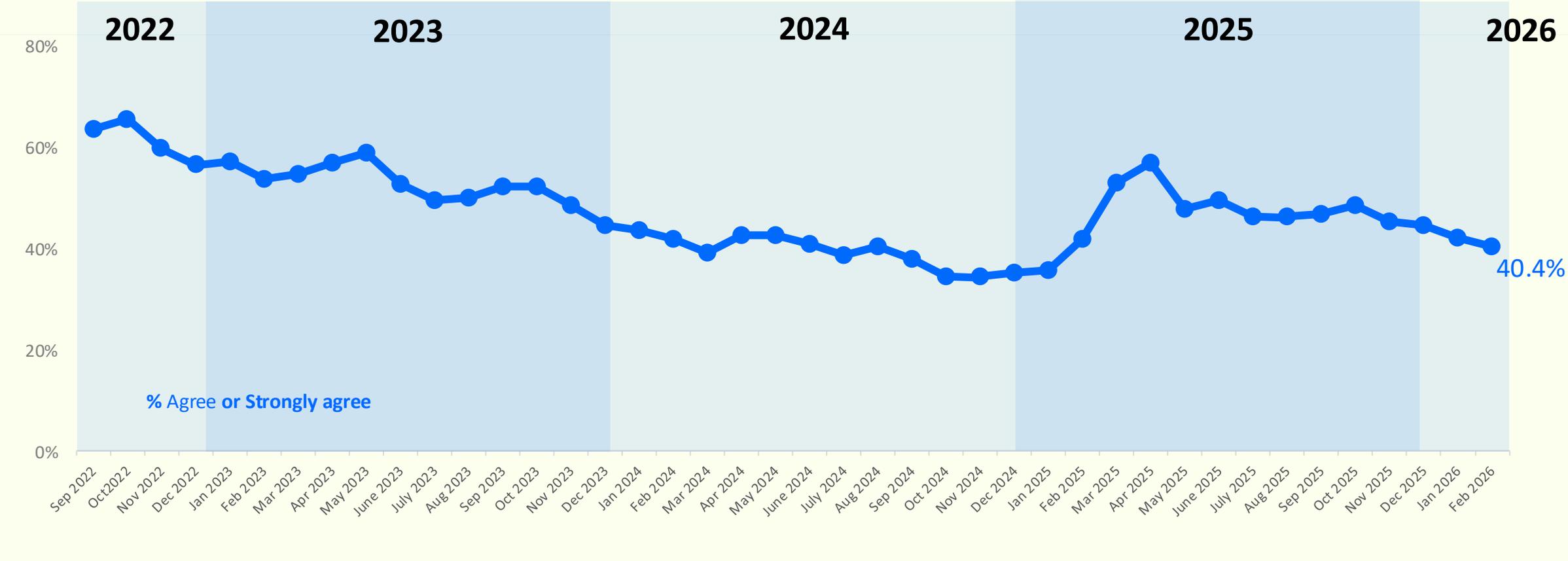
Leisure Travel Enthusiasm Continues to Hold Steady

Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



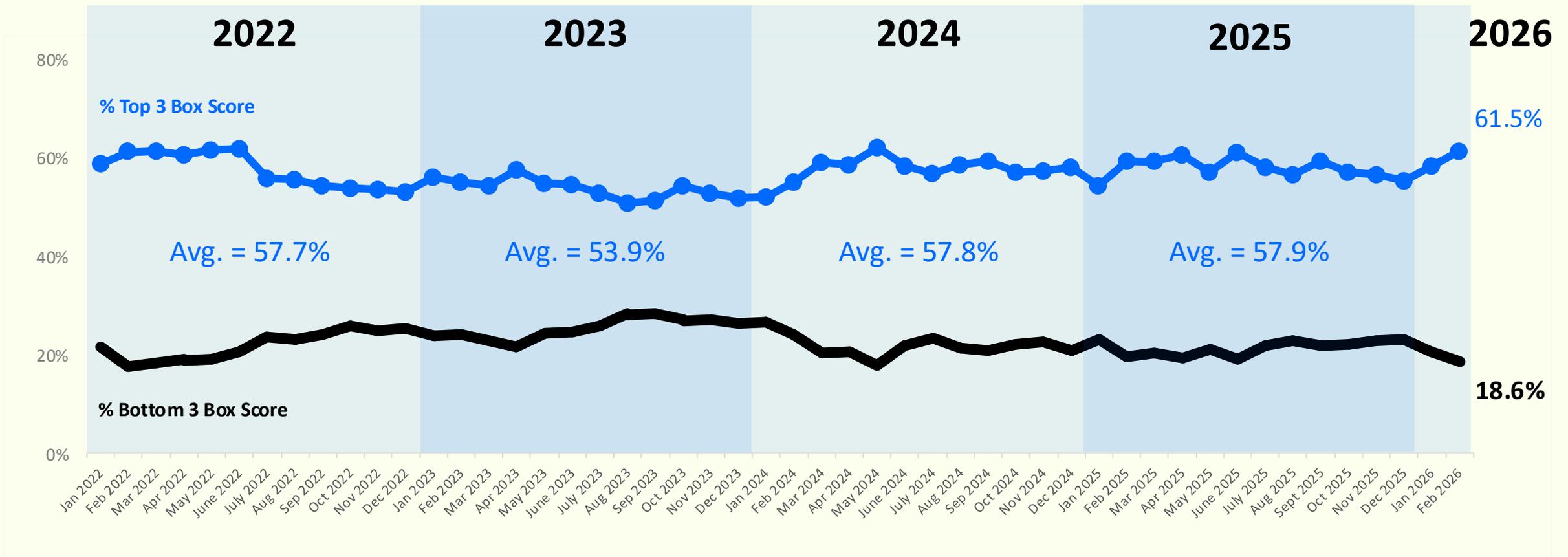
Caution Still in the Air: Recession Fears Increased Then Eased in 2025

Statement Agreement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



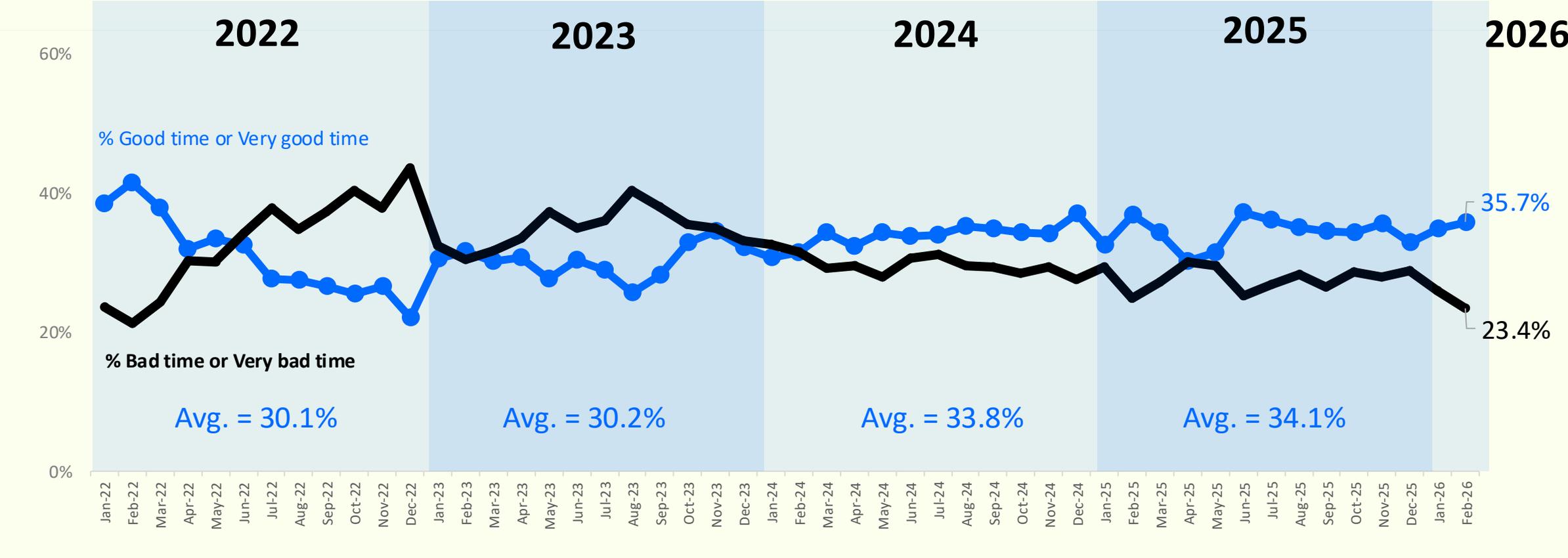
Priority Check: Leisure Travel Remains High on the List

Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



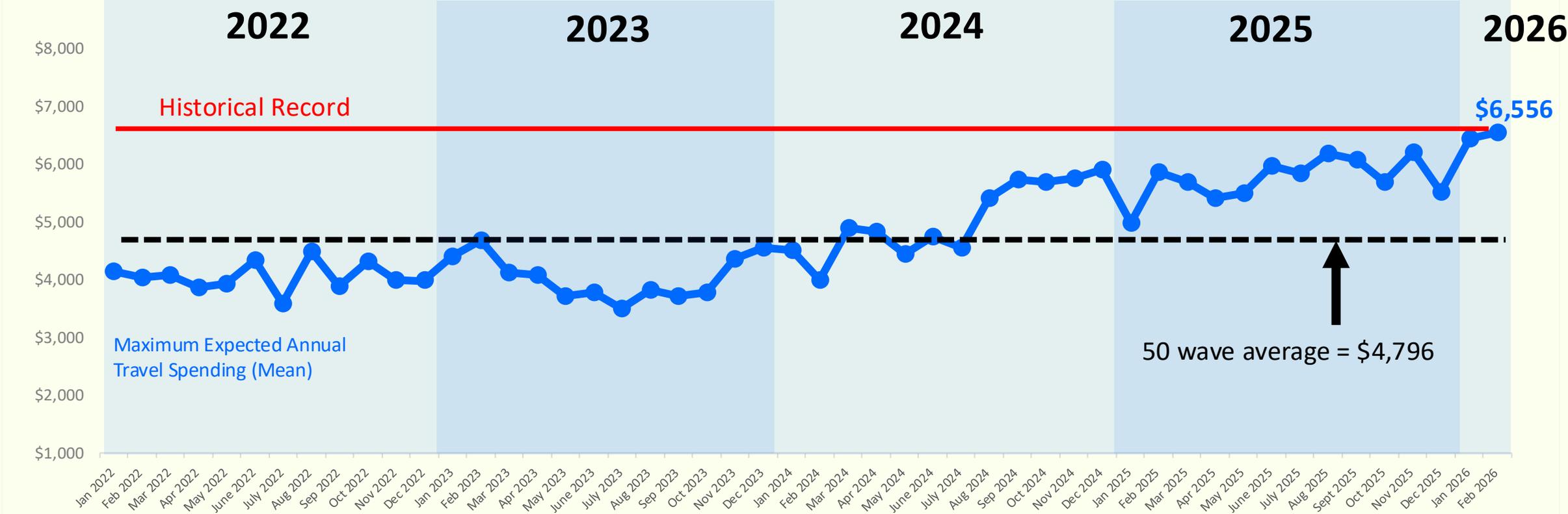
Cautious Green Light: More Say “Good Time” Than “Bad Time” to Spend on Travel

Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



Americans Are Increasingly Keeping the Travel Door Wide Open on Spending

Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



2025 Key Takeaways

- **Travel momentum is strong:** Leisure travel excitement averages 8.2 (out of 11) and three-in-five travelers rank leisure travel a high near term priority (58%).
- **Spending is a priority, but travelers remain cautious:** Max budget increased and today it's at a record high (\$6,556 in February 2026), yet only one third of travelers said it's a good time to spend (34%).
- **Optimism with economic uncertainty:** Recession concern has eased but stays elevated (40%).

Reno Tahoe Brand Metrics



Brand Equity Index Summary

Year

2025

Destination Type

Cities

Destination

Reno, NV

Competitive Set

Denver, CO, Las Vegas, NV, Portland, OR and San Francisco, CA

Future Partners Destination Brand Equity Index is made up of the following six key elements, which are considered as the important components of a brand's equity. These factors are then utilized to calculate a destination's index score on a 100-pt scale.

Awareness

The extent to which travelers are familiar with a destination as a viable place to visit.



Reputation

The overall appeal and perceived quality of the destination among travelers.



Differentiation

How unique and distinct the destination's visitation experience is compared to others.



Energy/Momentum

The perception of how much the destination's popularity has increased/decreased recently.



Relevance

The likelihood that a consumer will consider visiting the destination in the next few years.



Loyalty

The degree to which consumers have visited the destination in the past.



49.7

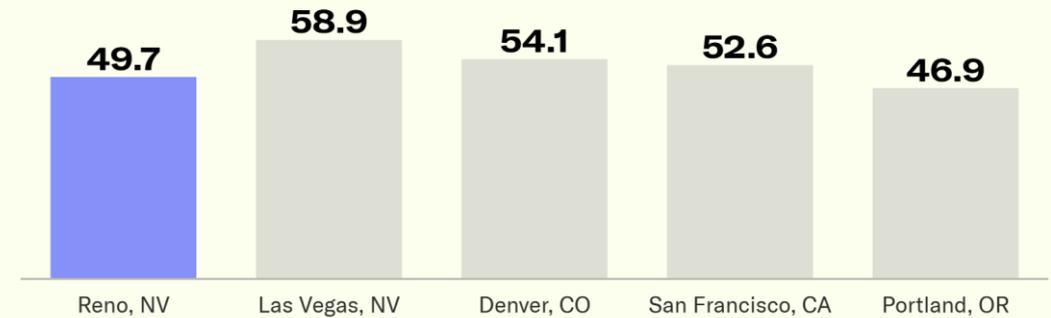
Reno, NV

(-0.3pts YOY)

Competitor Rankings

(Index Ratings - Reno, NV vs. Top Ranking Competitive Set)

Average: 52.4



*Barometer values indicate how each destination performs relative to the selected competitive set, with 50 representing average performance.

Destination Familiarity



Year

2025

Destination Type

Cities

Destination

Reno, NV

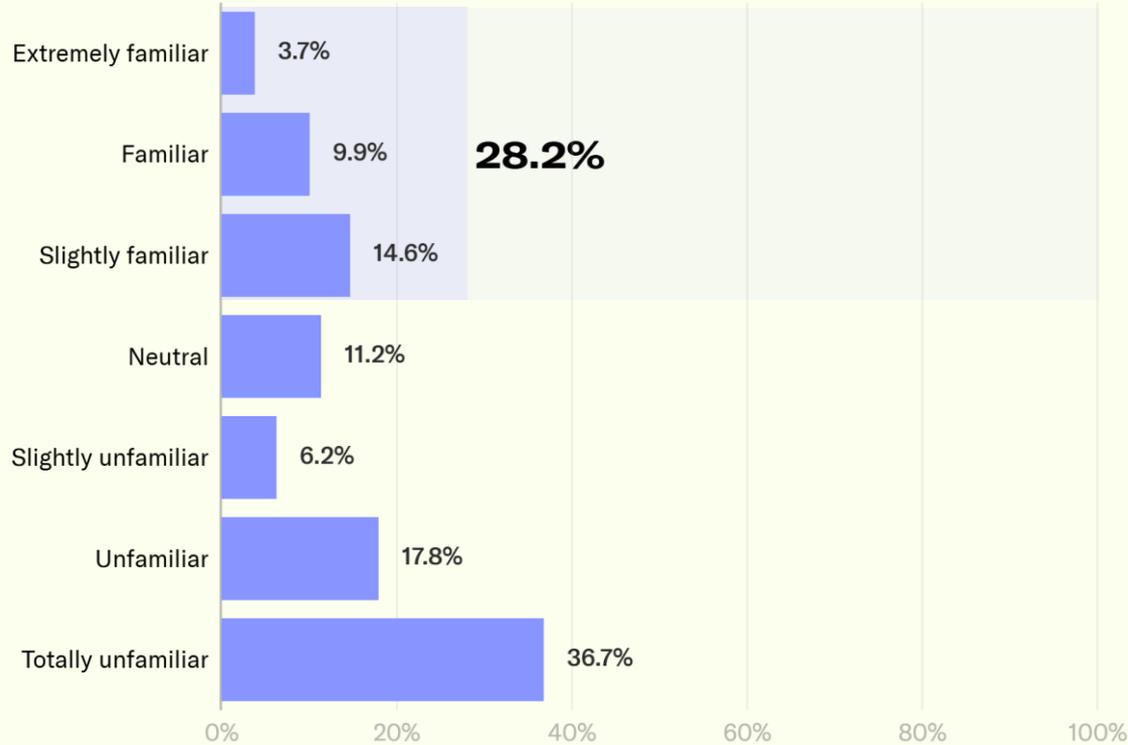
Competitive Set

Denver, CO, Las Vegas, NV, Portland, OR and San Francisco, CA

Reno, NV, 2025



Familiarity with Things to See and Do in Reno, NV



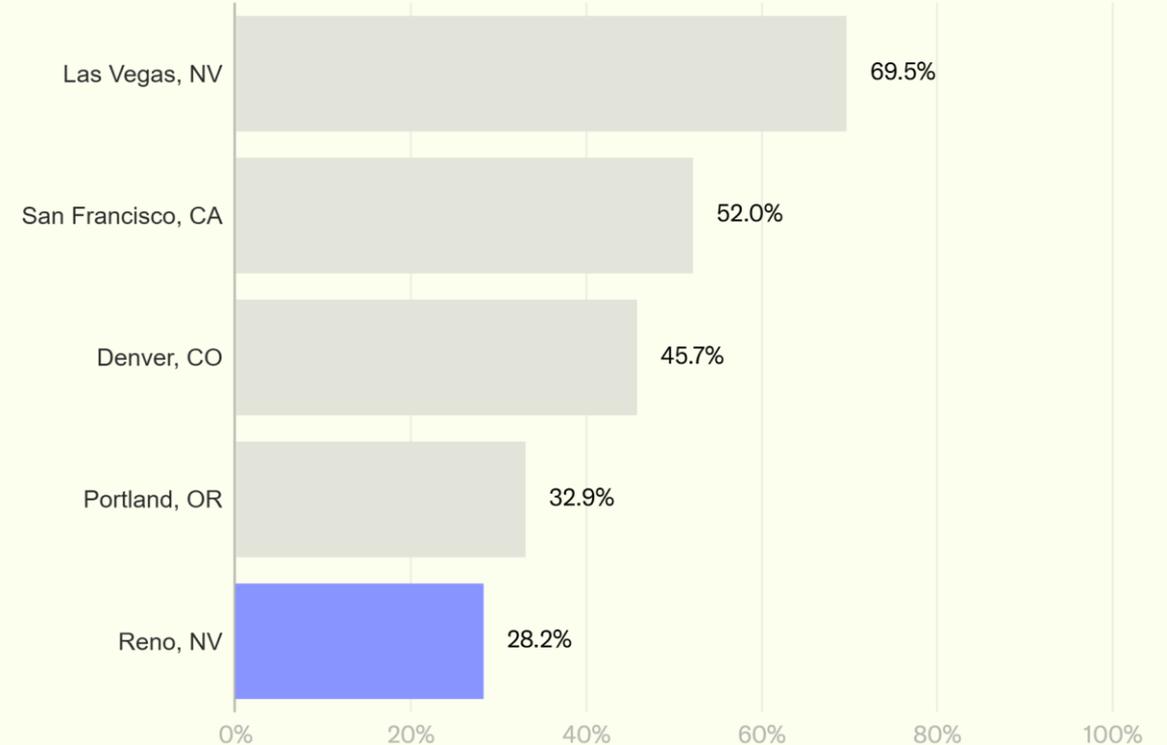
Base: Reno, NV set, 2025 respondents.
673 completed surveys.

Cities Ranked, 2025



(Top 3 Box - % Rating "Slightly familiar" or "Extremely familiar" for Each Destination)

Average 45.7%



Base: Competitive set, 2025 respondents.
3,430 completed surveys.

Appeal as a Place to Visit



Year

2025

Destination Type

Cities

Destination

Reno, NV

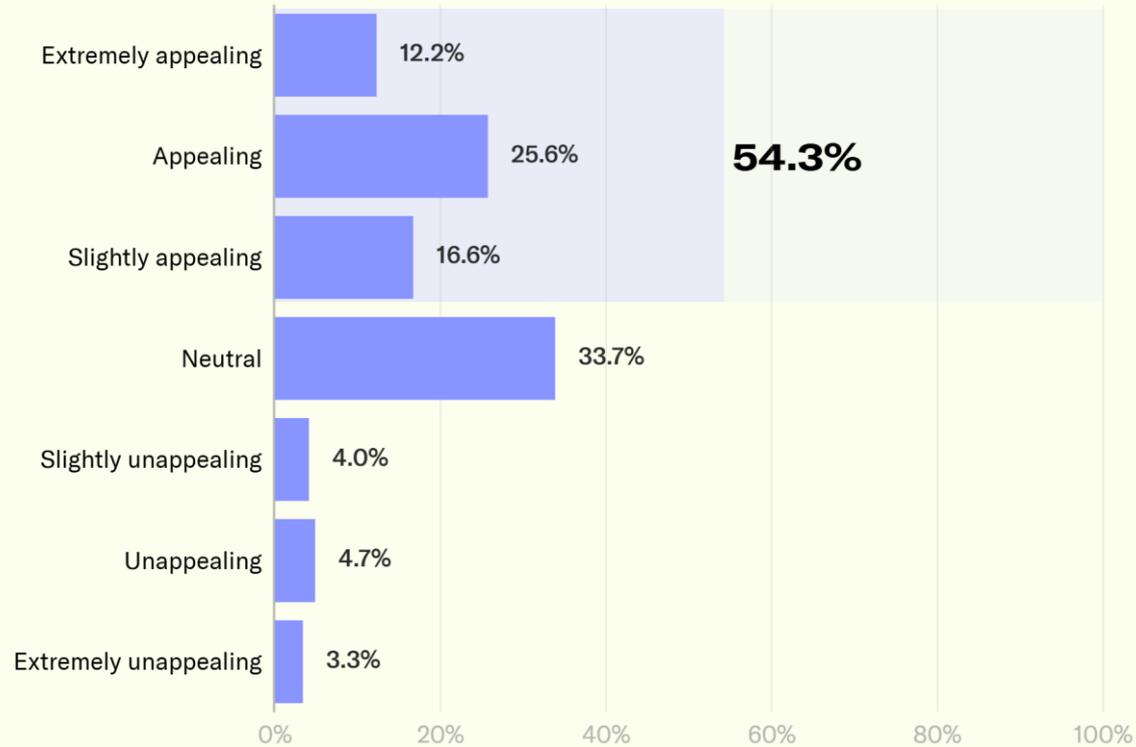
Competitive Set

Denver, CO, Las Vegas, NV, Portland, OR and San Francisco, CA

Reno, NV, 2025



Appeal of Reno, NV as a Leisure Destination



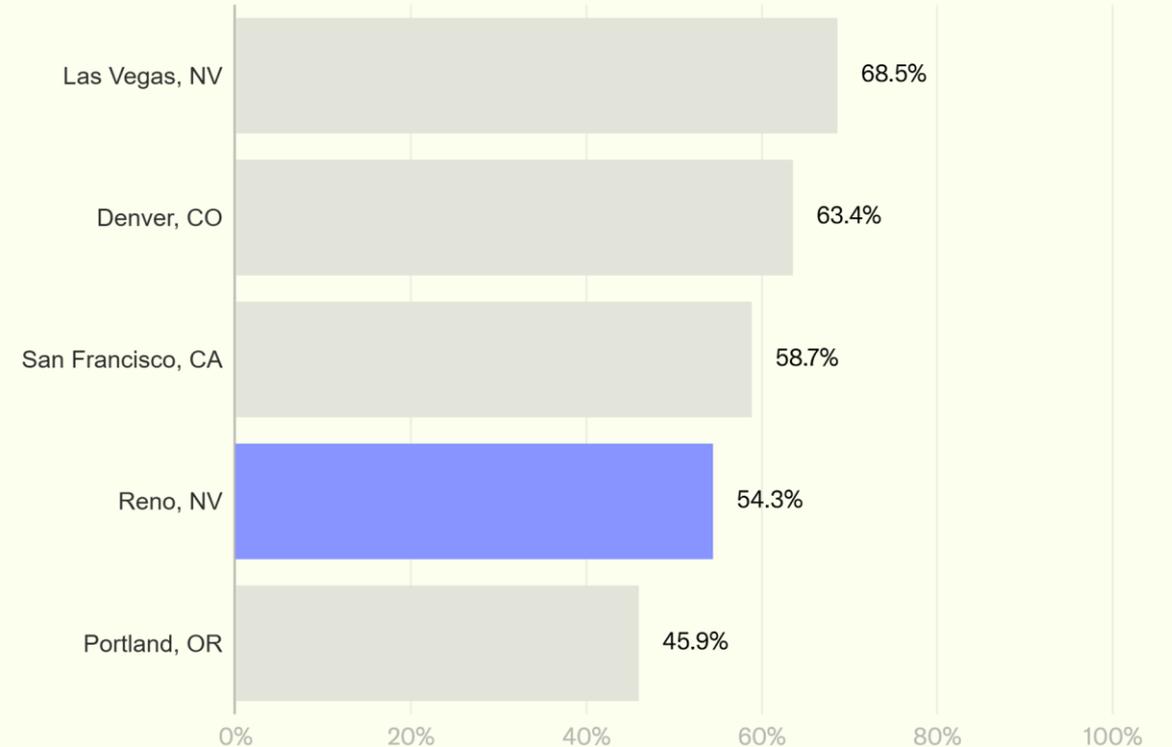
Base: Reno, NV set, 2025 respondents.
673 completed surveys.

Cities Ranked, 2025



(Top 3 Box - % Rating "Slightly Appealing" or "Extremely Appealing" for Each Destination)

Average 58.2%



Base: Competitive set, 2025 respondents.
3,430 completed surveys.

Destination Uniqueness

Year
2025

Destination Type
Cities

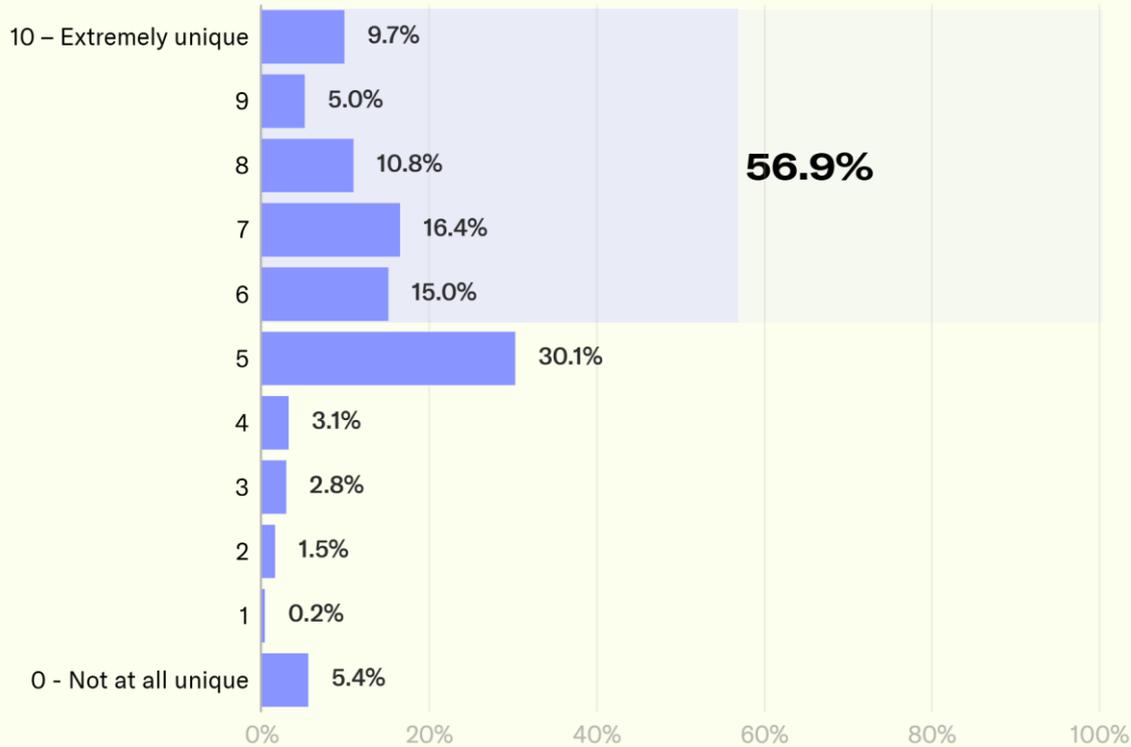
Destination
Reno, NV

Competitive Set
Denver, CO, Las Vegas, NV, Portland, OR and San Francisco, CA

Reno, NV, 2025



Uniqueness of Reno, NV as a Leisure Destination



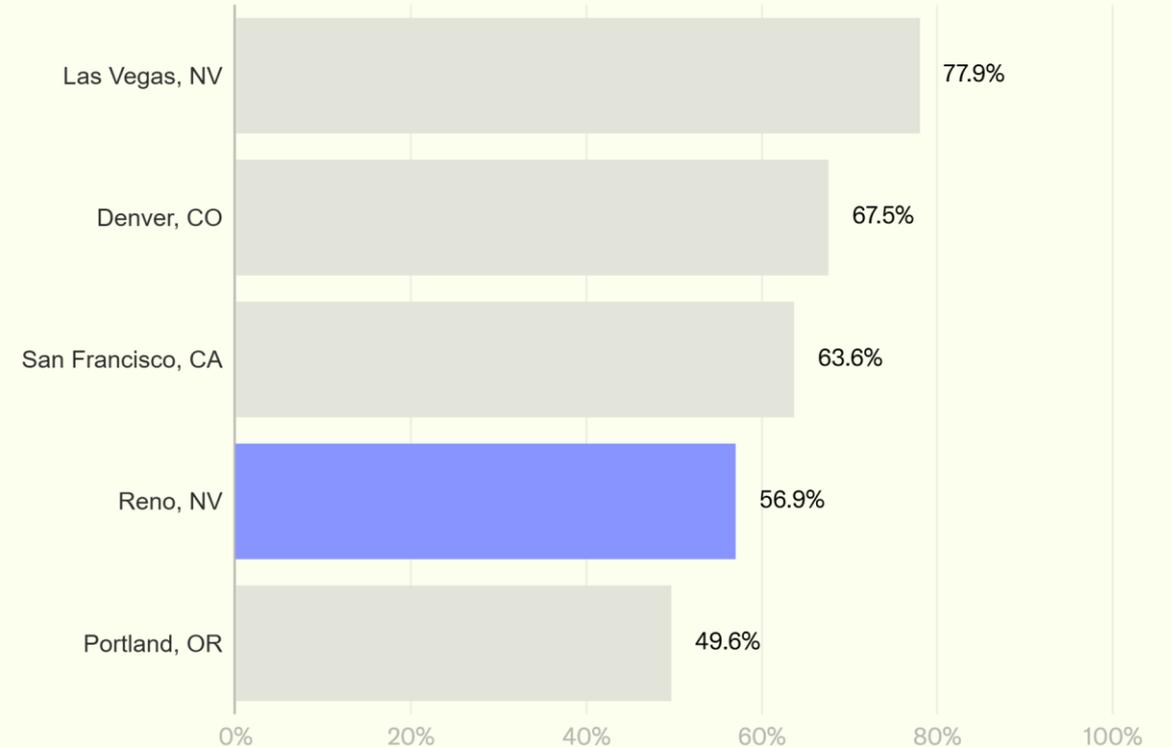
Base: Reno, NV set, 2025 respondents.
673 completed surveys.

Cities Ranked, 2025



(Positive Rating - % Selecting "6" - "10 - Extremely unique" for Each Destination)

Average 63.1%



Base: Competitive set, 2025 respondents.
3,430 completed surveys.

Question: Please think about the experiences a traveler can have in Reno, NV and compare that to other destinations.
HOW UNIQUE these experiences are. The experiences a visitor can have there are _____.

Change in Destination Popularity



Year
2025

Destination Type
Cities

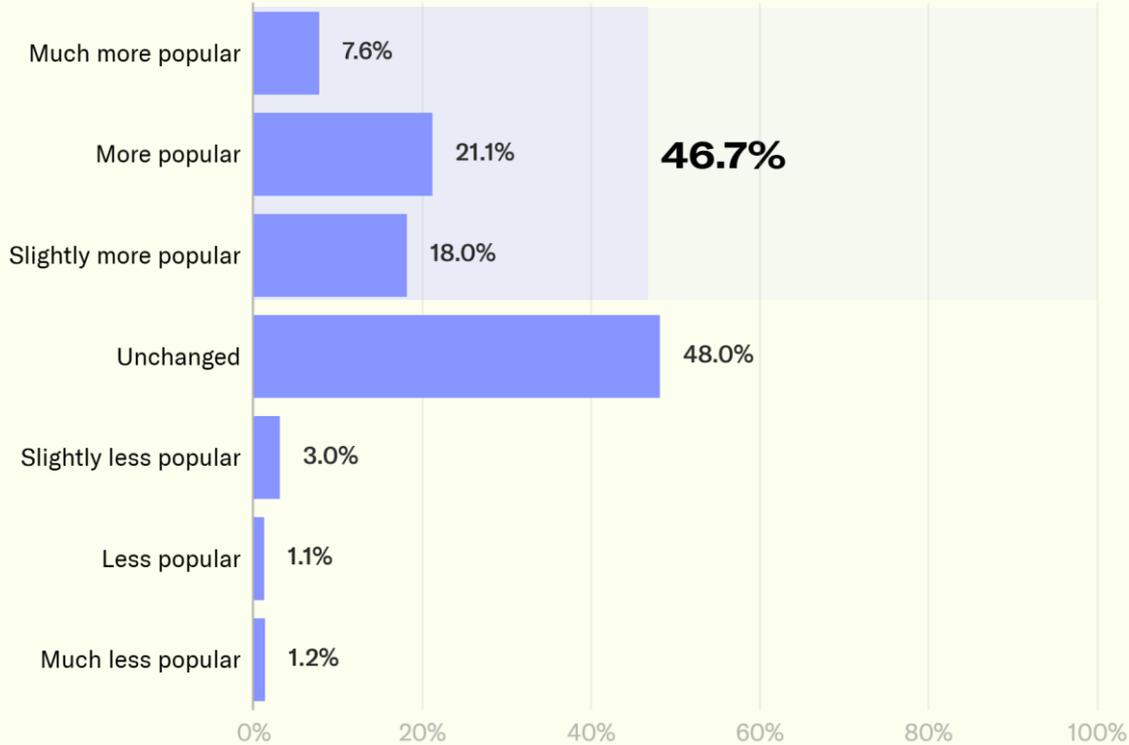
Destination
Reno, NV

Competitive Set
Denver, CO, Las Vegas, NV, Portland, OR and San Francisco, CA

Reno, NV, 2025



Change in Popularity Perceptions for Reno, NV

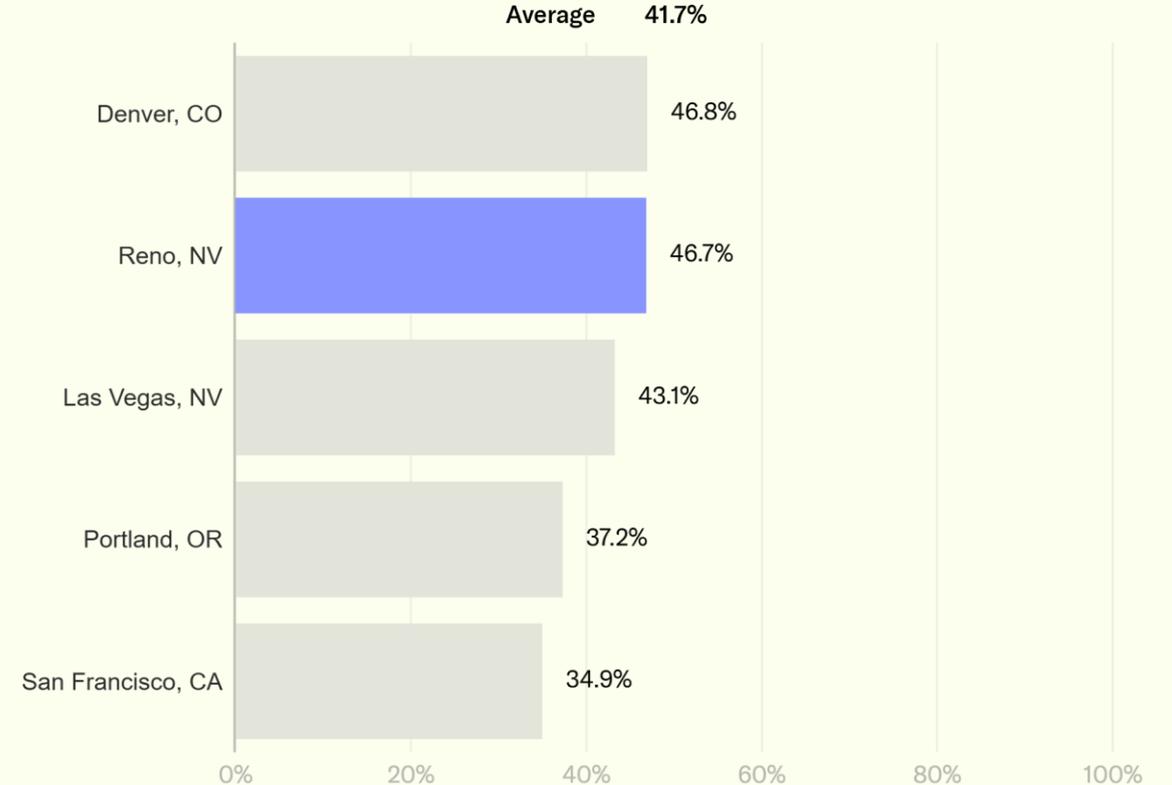


Base: Reno, NV set, 2025 respondents.
540 completed surveys.

Cities Ranked, 2025



(Top 3 Box - % Rating "Slightly More Popular" to "Much More Popular" for Each Destination)



Base: Competitive set, 2025 respondents.
3,088 completed surveys.

Question: In the last few years, has Reno, NV's popularity as a place to visit changed? (Select one to complete the sentence)
From what I have seen, Reno, NV is becoming _____.

Likelihood to Visit



Year

2025

Destination Type

Cities

Destination

Reno, NV

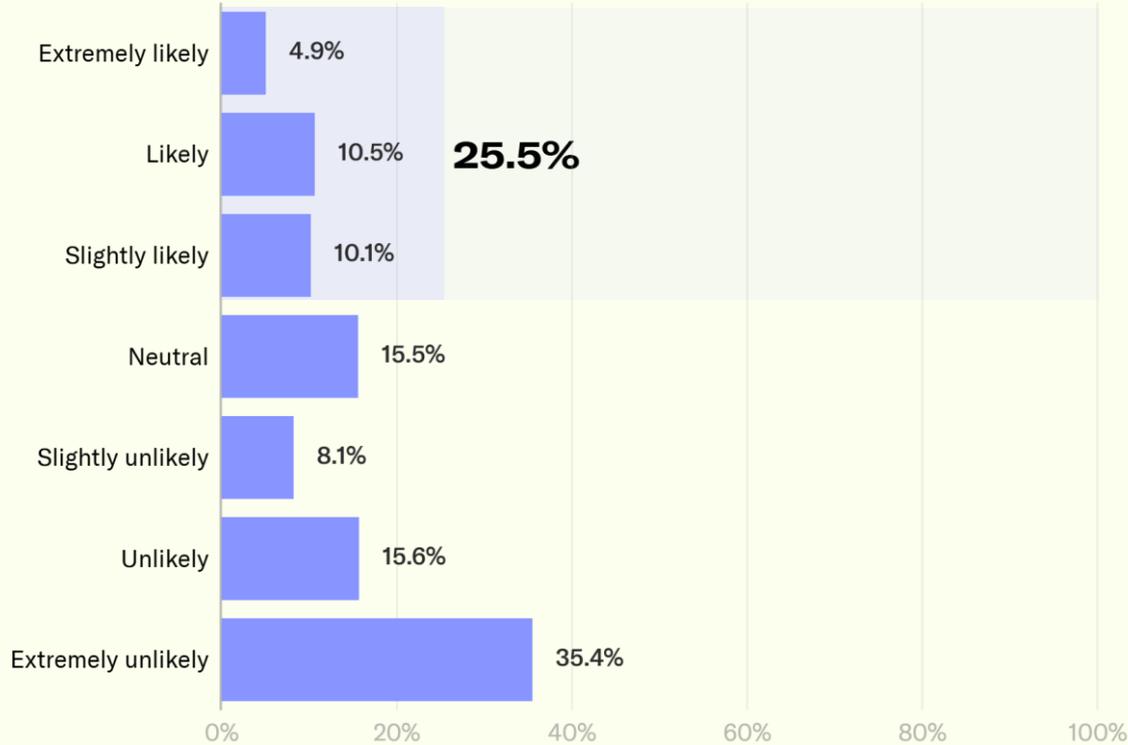
Competitive Set

Denver, CO, Las Vegas, NV, Portland, OR and San Francisco, CA

Reno, NV, 2025



Likelihood to Visit Reno, NV in the Next Two Years



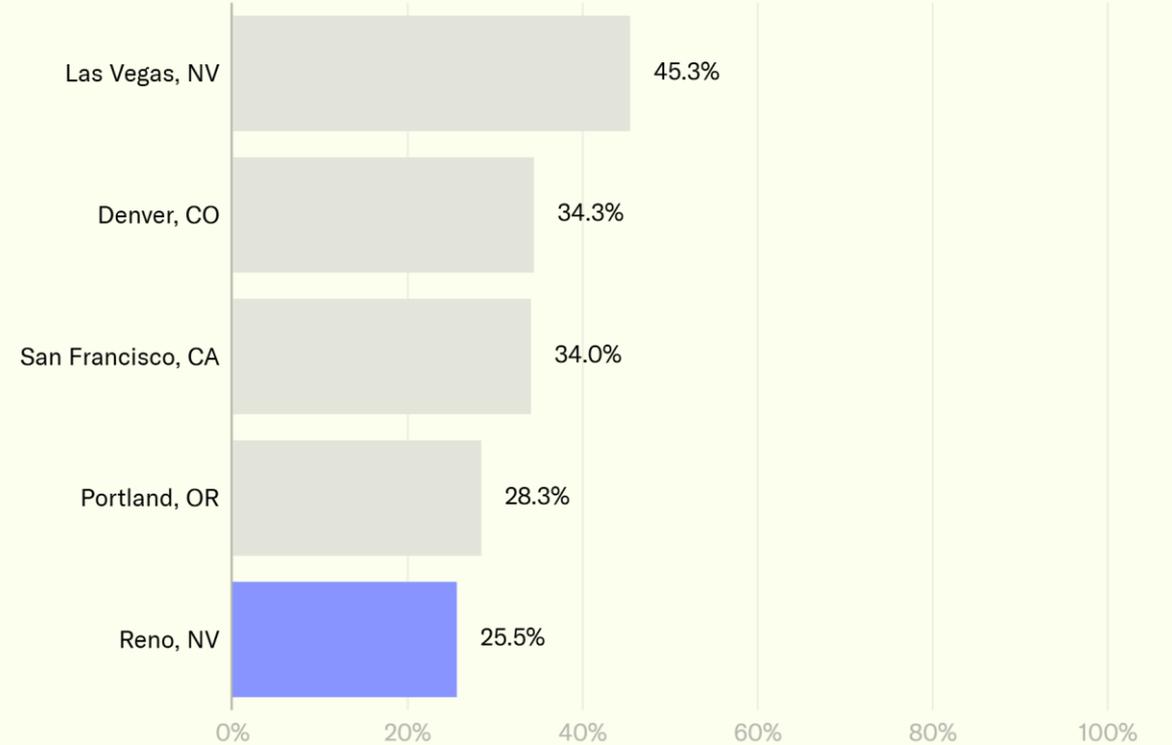
Base: Reno, NV set, 2025 respondents.
673 completed surveys.

Cities Ranked, 2025



(Top 3 Box - % Rating "Slightly likely" to "Extremely likely" to Visit Each Destination)

Average 33.5%



Base: Competitive set, 2025 respondents.
3,430 completed surveys.

Recent Visitation (Past Two Years)

Year
2025

Destination Type
Cities

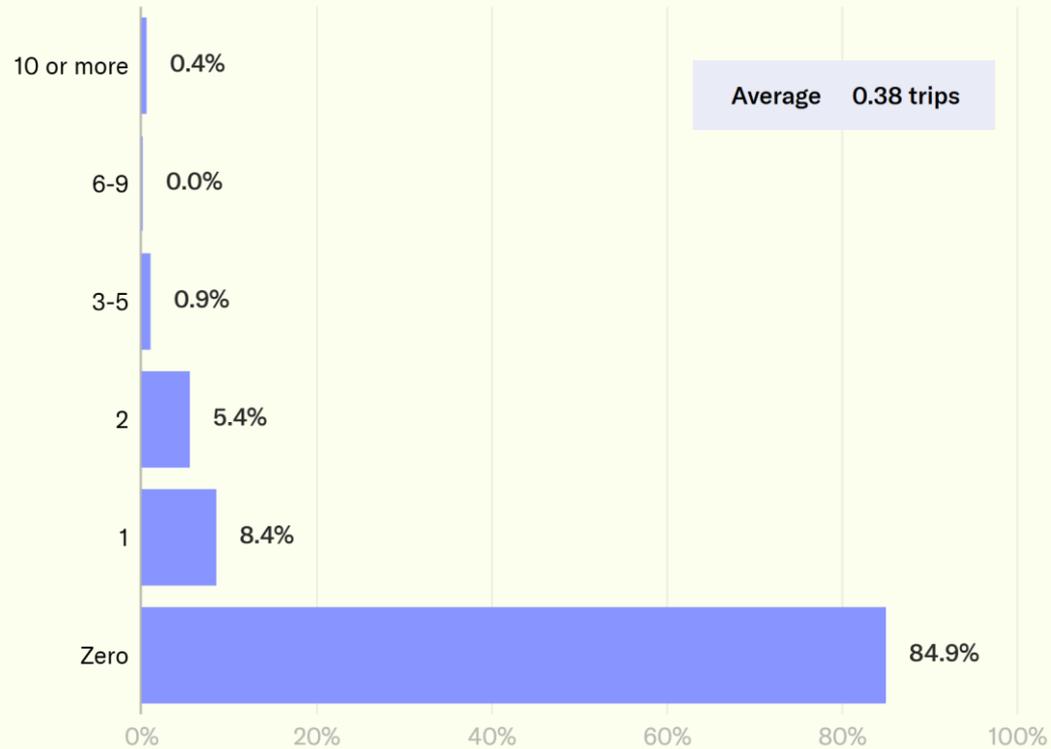
Destination
Reno, NV

Competitive Set
Denver, CO, Las Vegas, NV, Portland, OR and San Francisco, CA

Reno, NV, 2025



Visitation to Reno, NV in the Past Two Years

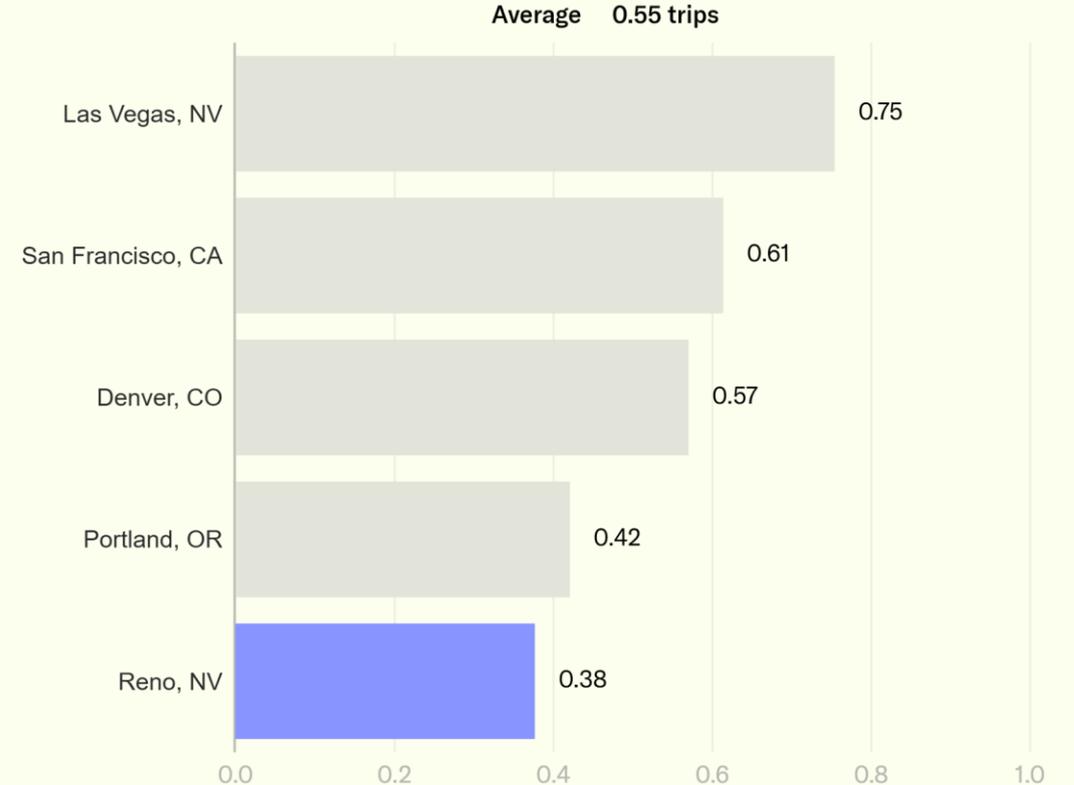


Base: Reno, NV set, 2025 respondents.
673 completed surveys.

Cities Ranked, 2025



(Average Number of Trips per Destination in the Past Two Years)



Base: Competitive set, 2025 respondents.
3,430 completed surveys.



Visit Reno Tahoe Visitor Profile 2025

Research Objectives & Methodology

This report presents findings from the 2025 Visit Reno Tahoe Visitor Profile Study, conducted on behalf of the Reno-Sparks Convention & Visitors Authority (RSCVA) by Future Partners.

The primary objective of this research is to profile visitors and track visitor behavior to the region. Specifically, this research examines:

- Trip characteristics (trip purpose, length of stay, and lodging type)
- Activities and attractions visited in Reno Tahoe
- In-market spending
- Reno Tahoe's destination attributes
- Trip planning windows
- Visitor satisfaction
- Visitor demographics and origin markets

Future Partners conducted an online survey of N=600 Reno Tahoe visitors aged 18 and older who traveled to the region in calendar year 2025. The survey was fielded through a trusted panel provider from May 2025 – January 2026. All quantitative data presented within this report is weighted to be representative of the population of Reno Tahoe visitors using lodging type and origin markets.

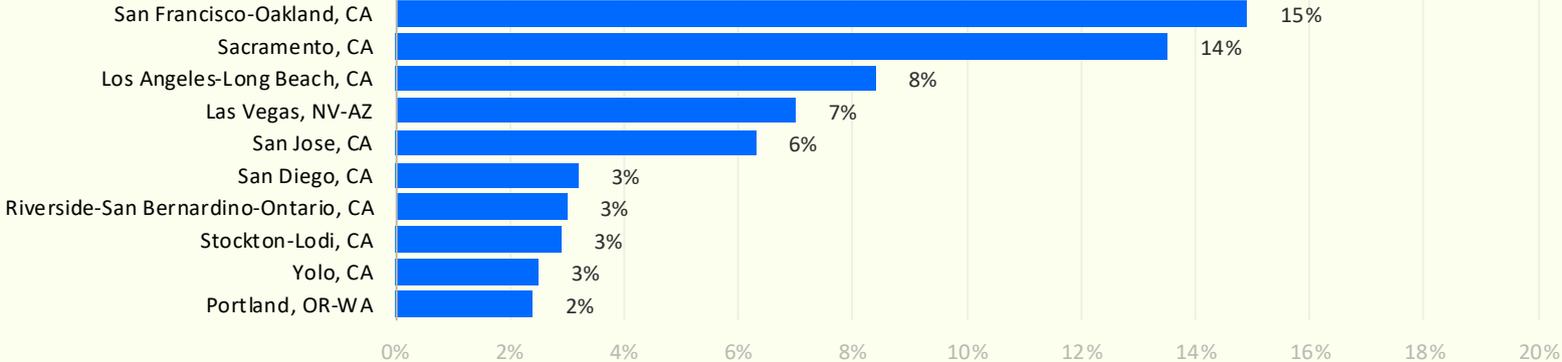


Executive Summary

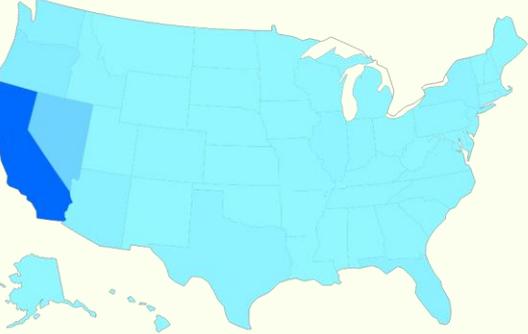
Reno Tahoe's visitor base is anchored in regional drive markets, with meaningful airlift upside tied to paid lodging.

Origin Markets

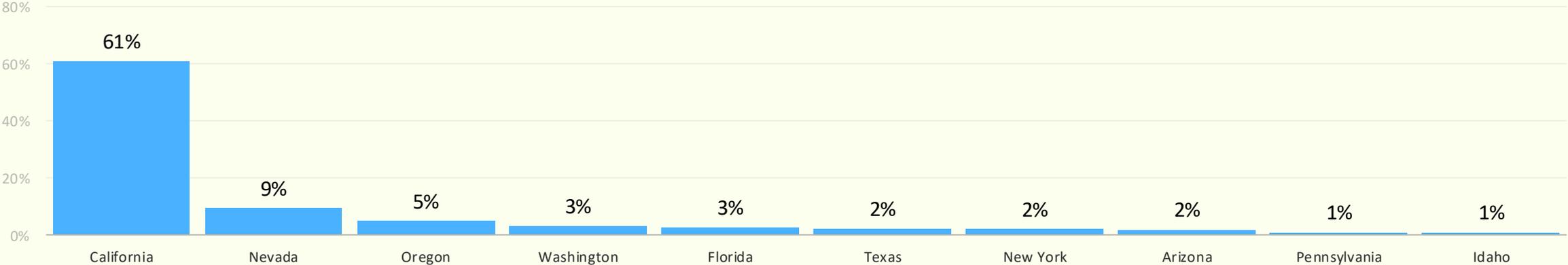
Top 10 Origin Metros



Origin Map



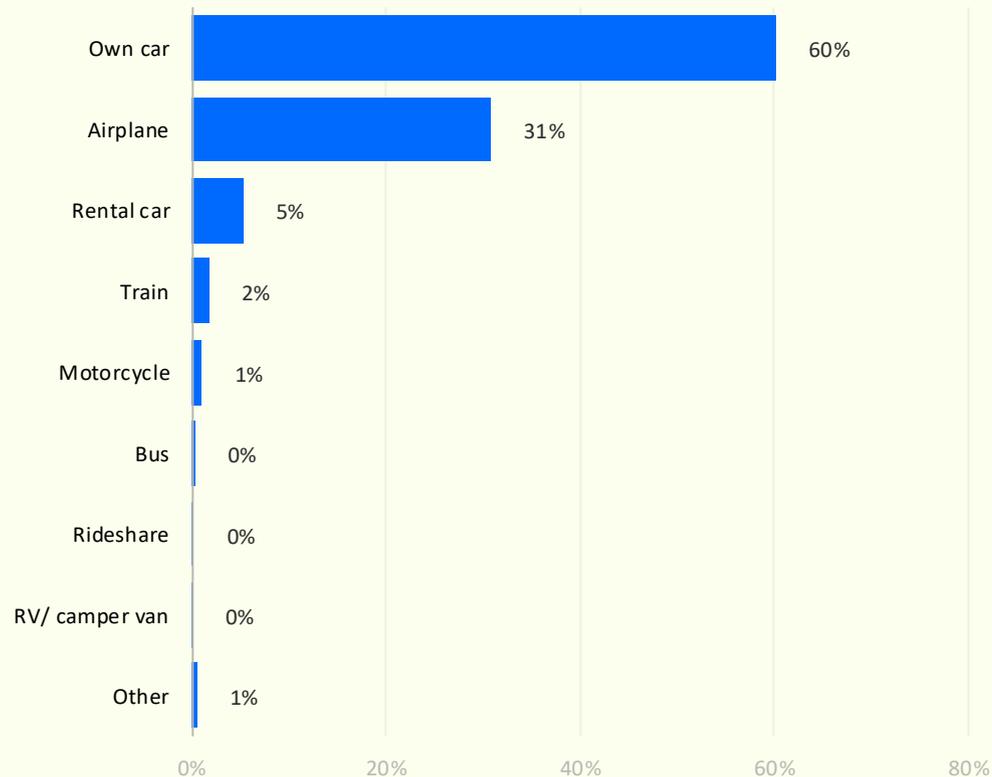
Top 10 Origin States



Most overnight visitors arrived in the destination using their own car (60%), though almost one third arrived by airplane (31%).

Visitors staying in a vacation rental were more likely to fly into the area (47% vs 31% total).

Arrival Transportation



Detail by Lodging Type

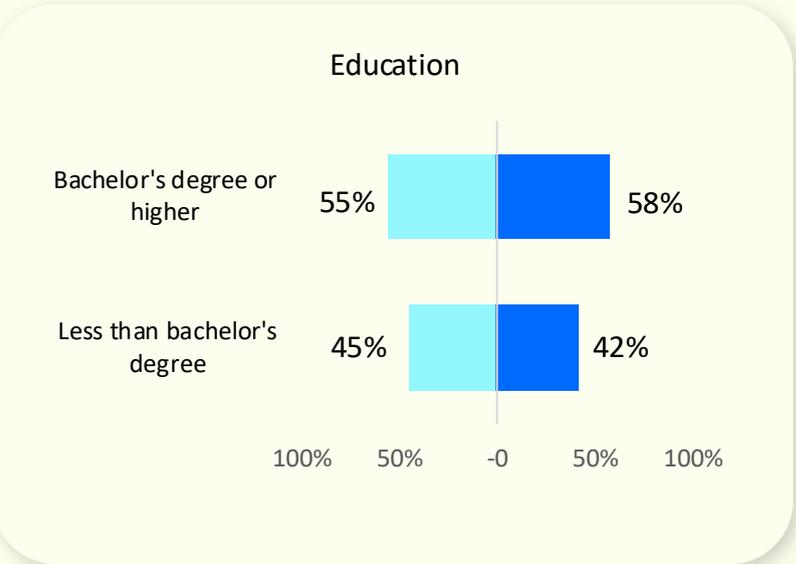
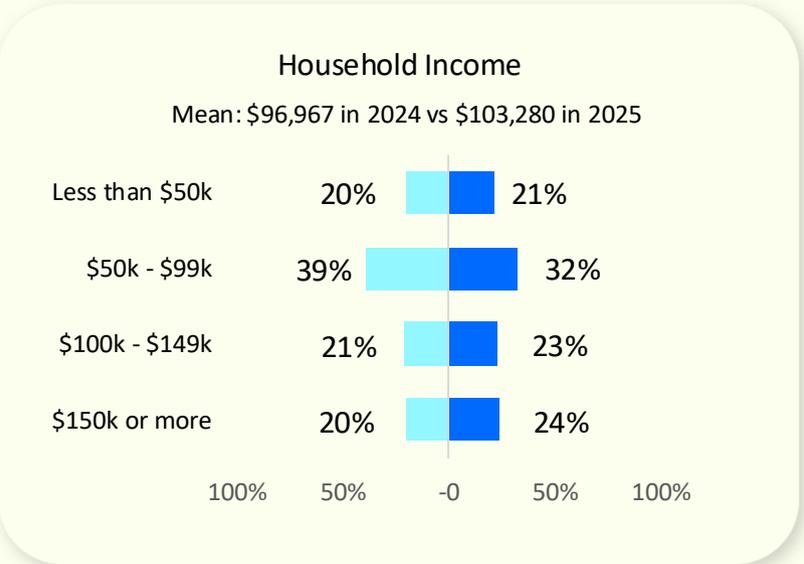
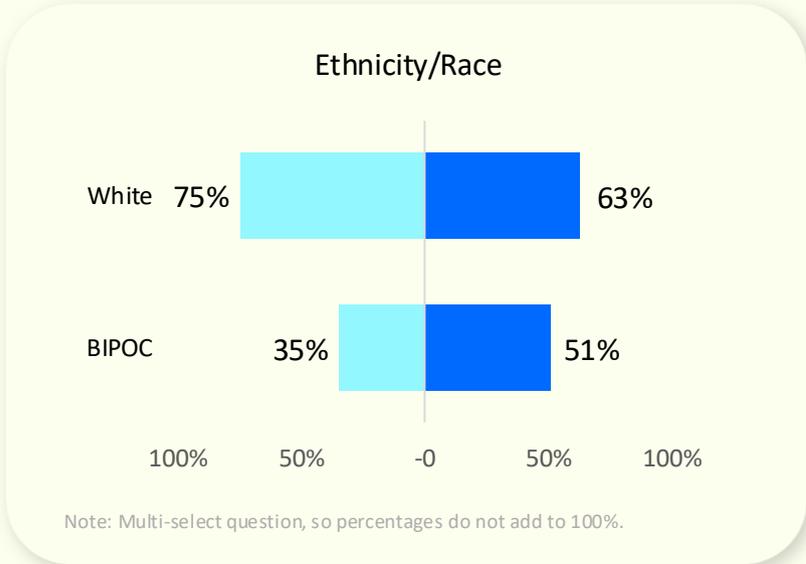
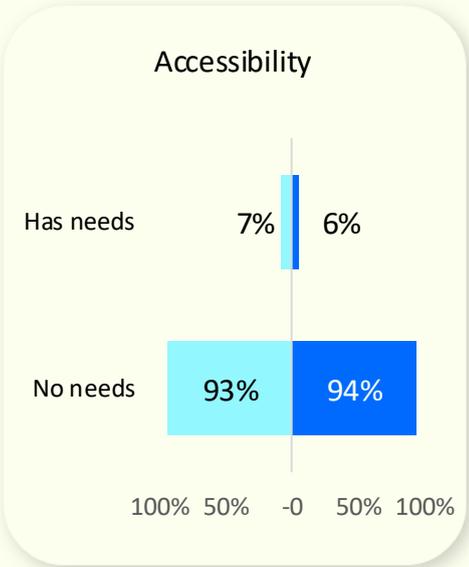
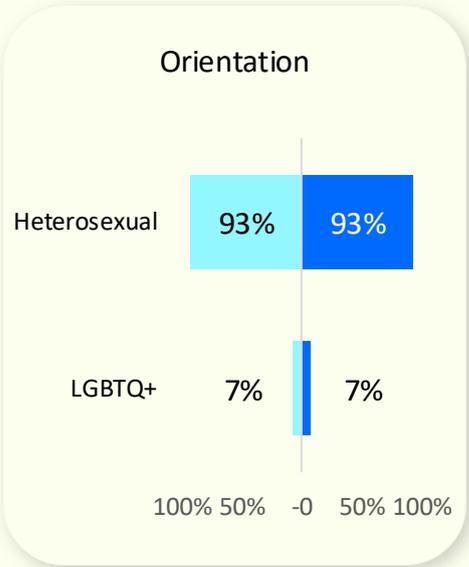
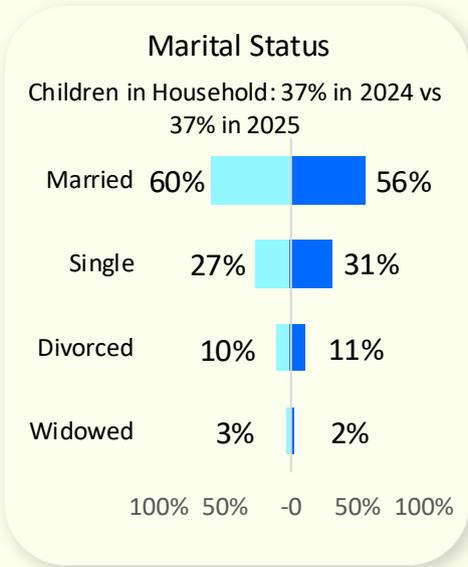
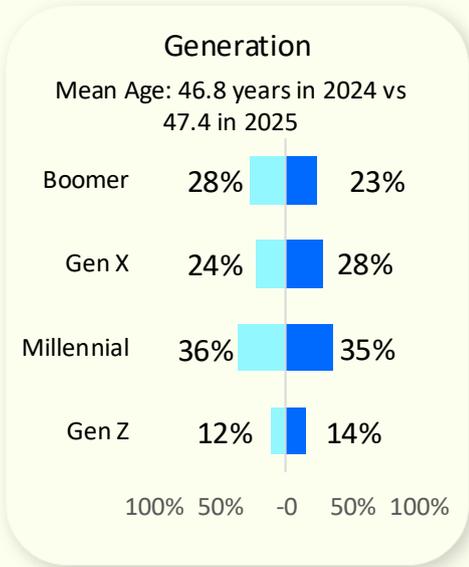
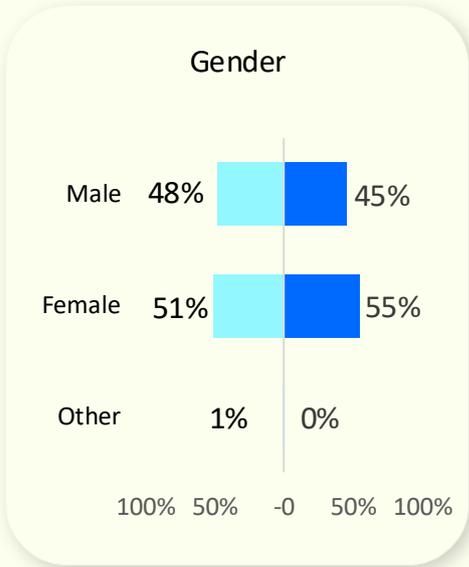
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Own car	60%	62%	53%	38%	66%
Airplane	31%	30%	34%	47%	23%
Rental car	5%	5%	8%	7%	1%
Train	2%	1%	3%	3%	4%
Motorcycle	1%	0%	0%	2%	5%
Bus	0%	0%	0%	2%	0%
Rideshare	0%	0%	1%	0%	0%
RV/ camper van	0%	0%	0%	1%	0%
Other	1%	1%	0%	0%	0%
Base	501	230	161	164	87

Question: On your last trip, what type of transportation did you use to arrive to the Reno Tahoe region?

Base: 2025 overnight visitors. 571 completed surveys.

Note: Blue shading indicates segments that over index on the item compared to total, while red shading indicates segments that under index.

Demographics: 2024 vs 2025

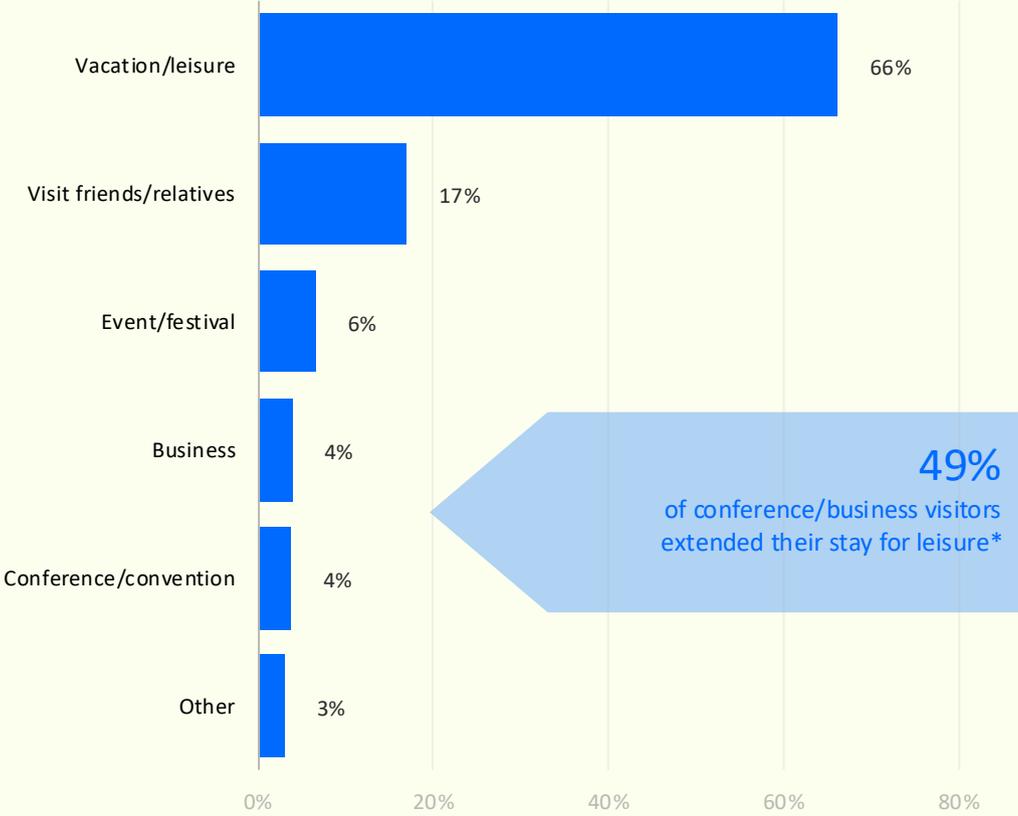


Leisure dominates the funnel, with smaller business and convention segments offering directional signals.

Most overnight visitors traveled to Reno Tahoe for vacation (66%), followed distantly by those visiting friends or family (17%).

Overnight visitors staying in paid lodging were more likely to visit the area for vacation (82% vacation rental vs 66% total, 74% casino hotel, 73% non-gaming hotel). Overnight visitors staying in a private home were more likely to travel to the area to see their friends and relatives (61% vs 17%).

Primary Trip Purpose



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Vacation/leisure	66%	74%	73%	82%	21%
Visit friends/relatives	17%	9%	8%	7%	61%
Event/festival	6%	7%	7%	6%	3%
Business	4%	3%	5%	2%	8%
Conference/convention	4%	4%	4%	3%	5%
Other	3%	3%	3%	1%	2%
Base	571	260	184	173	95

Question: What was the primary purpose of your last visit to Reno Tahoe? | Did you extend your trip to Reno Tahoe for leisure purposes?

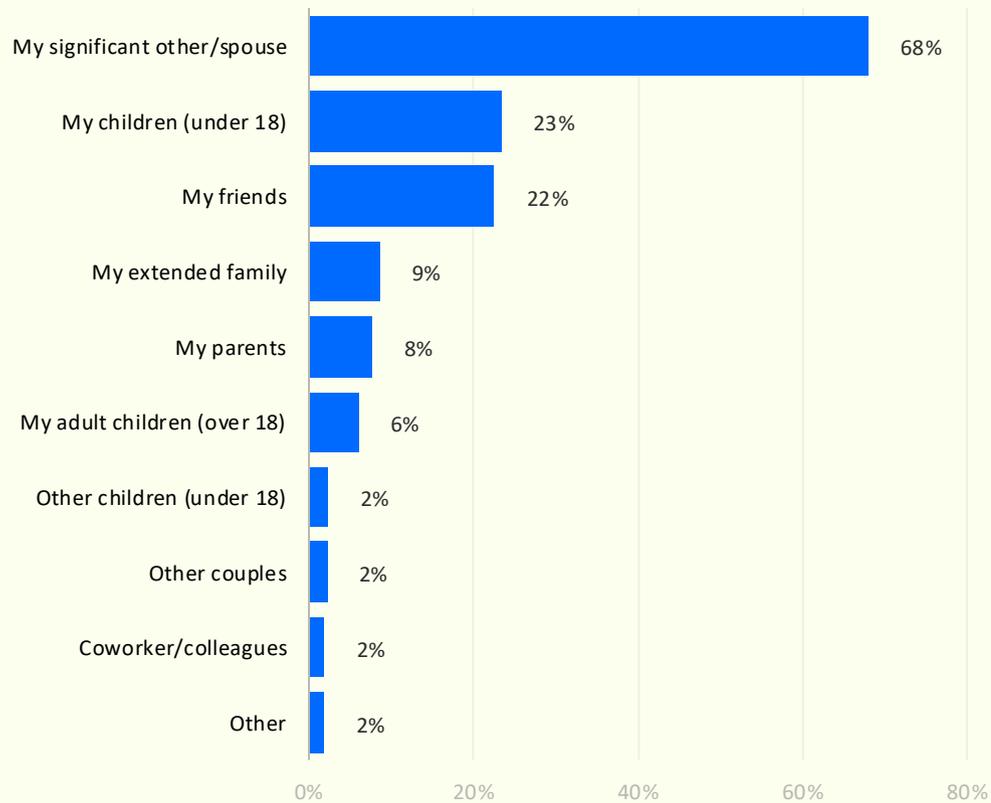
Base: 2025 overnight visitors. 571 completed surveys. Conference/Business segment has small base n < 100; bleisure results should be considered directional.

Note: Blue shading indicates segments that over index on the item compared to total, while red shading indicates segments that under index.

A quarter of overnight visitors (25%) traveled to Reno Tahoe with children under the age of 18.

Overnight visitors staying in a vacation rental were more inclined to travel with their children (43% vs 23% total).

Travel Party Composition



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
My significant other/spouse	68%	63%	71%	78%	64%
My children (under 18)	23%	22%	26%	43%	24%
My friends	22%	26%	17%	24%	28%
My extended family (e.g., aunt/uncle, grandparents, etc.)	9%	9%	7%	12%	13%
My parents	8%	8%	10%	12%	10%
My adult children (over 18)	6%	4%	11%	8%	6%
Other children (under 18)	2%	0%	4%	4%	7%
Other couples	2%	1%	0%	1%	8%
Coworker/colleagues	2%	2%	3%	1%	0%
Other	2%	2%	1%	2%	1%
Base	501	230	161	164	87

Question: Who did you travel with on your last visit to the Reno Tahoe region? Select all that apply.

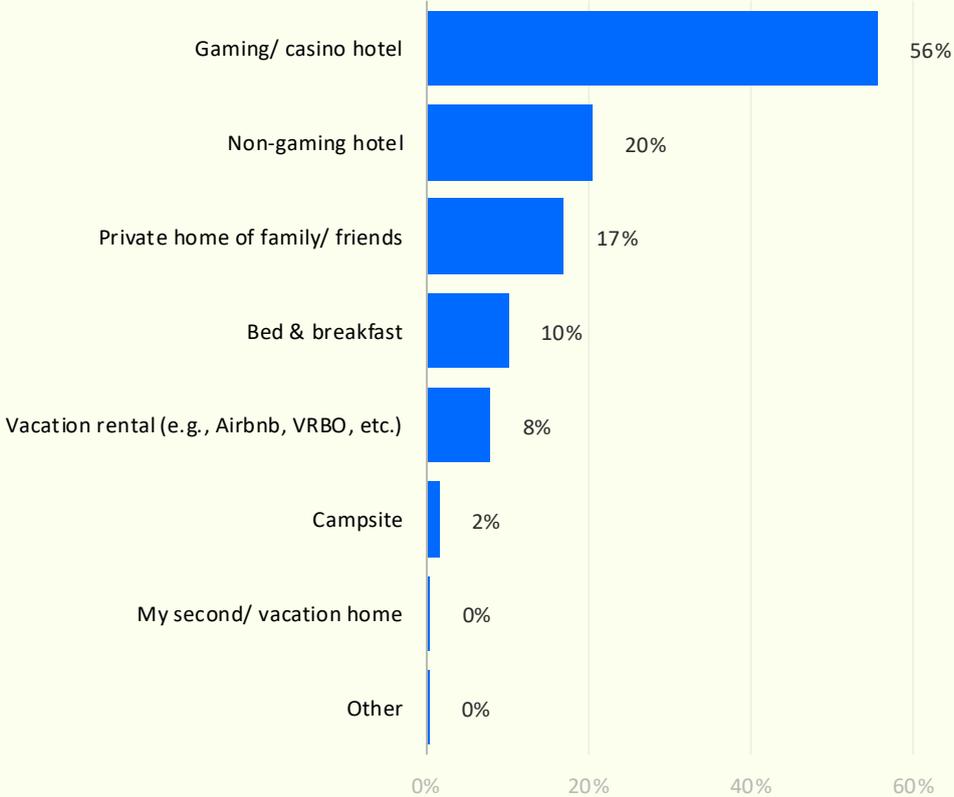
Base: 2025 overnight visitors. 501 completed surveys.

Note: Blue shading indicates segments that over index on the item compared to total, while red shading indicates segments that under index.

Overnight visitors typically stayed in a casino hotel (56%), with fewer staying at a non-gaming hotel (20%) or private home (17%).

Gen Z overnight visitors were more likely to stay in vacation rentals (15% vs 8% Total), whereas Boomer overnight visitors were less likely to do so(3%).

Accommodation Type



Detail by Generation

	Total	Gen Z	Millennials	Gen X	Boomers+
Gaming/ casino hotel	56%	51%	54%	58%	58%
Non-gaming hotel	20%	18%	25%	18%	19%
Private home of family/ friends	17%	27%	13%	18%	15%
Bed & breakfast	10%	17%	13%	9%	3%
Vacation rental (e.g., Airbnb, VRBO, etc.)	8%	15%	10%	5%	3%
Campsite	2%	1%	2%	2%	1%
My second/ vacation home	0%	2%	0%	0%	0%
Other	0%	0%	0%	0%	1%
Base	571	89	177	161	144

Question: What type of lodging did you use on your last trip to Reno Tahoe? Select all that apply.

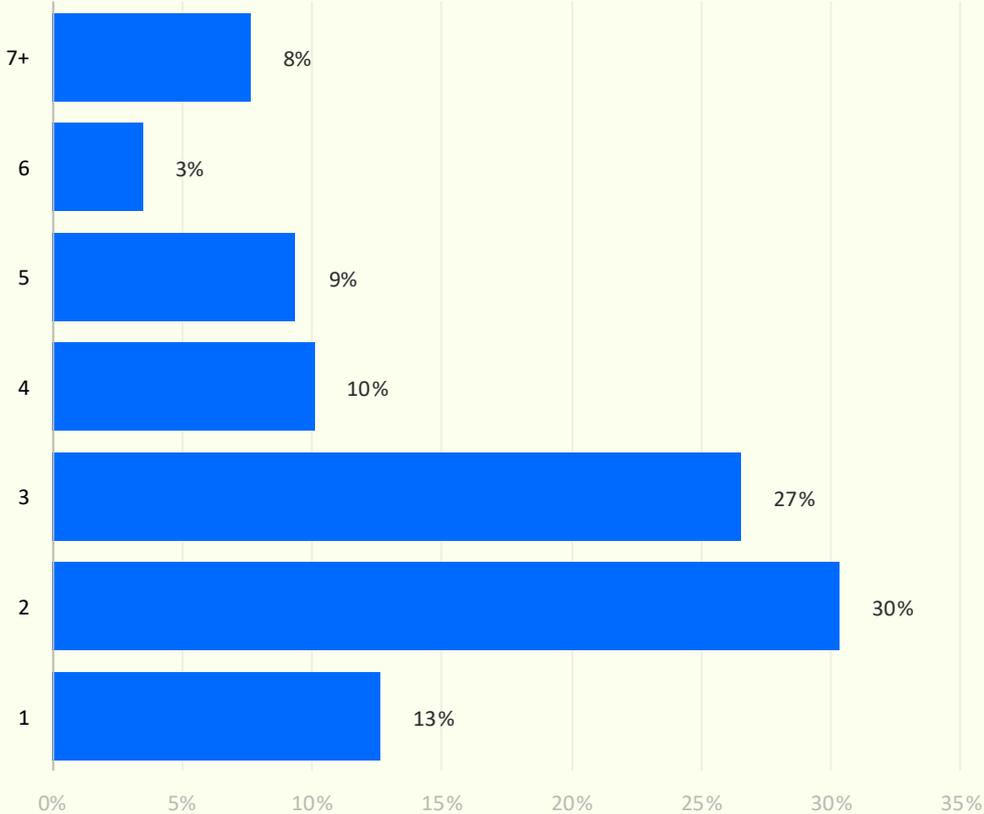
Base: 2025 overnight visitors. 571 completed surveys.

Note: Blue shading indicates segments that over index on the item compared to total, while red shading indicates segments that under index.

Overnight visitors stayed, on average, 3.3 nights in market.

Average length of stay has stayed remarkably consistent year over year – 3.4 nights in 2023 and 3.7 in 2024. Among overnight visitors, those staying in vacation rentals tended to stay longer – averaging 4.4 nights compared to 3.3 nights overall.

Trip Length in Nights



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
7+	8%	6%	6%	11%	14%
6	3%	2%	5%	10%	8%
5	9%	10%	10%	24%	7%
4	10%	11%	8%	20%	6%
3	27%	29%	24%	19%	26%
2	30%	30%	35%	13%	26%
1	13%	12%	11%	3%	14%
Mean (Nights)	3.3	3.1	3.2	4.4	3.9
Base	560	255	178	167	90

Question: How many nights did you stay in Reno Tahoe on your last trip?

Base: 2025 overnight visitors. 560 completed surveys.

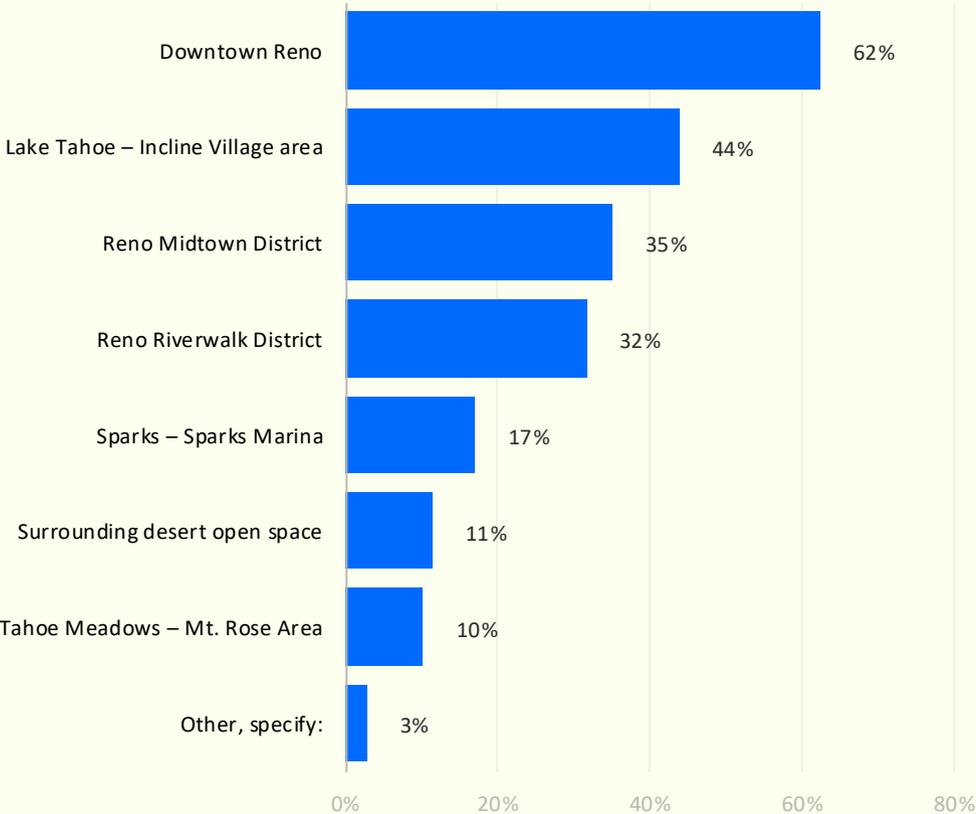
Note: Blue shading indicates segments that over index on the item compared to total, while red shading indicates segments that under index.

Downtown Reno regained momentum in 2025, while the broader place-mix remains stable.

Most overnight visitors went to Downtown Reno (62%), followed by Incline Village (44%), Midtown (35%), and the Riverwalk (32%).

Overnight visitors staying in a non-gaming hotel were more likely to visit Incline Village (57% vs 44% total), while those staying in a vacation rental were more likely to visit Mt. Rose (27% vs 10%).

Reno Tahoe Areas Visited



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental	VFR
Downtown Reno	62%	69%	50%	49%	65%
Lake Tahoe – Incline Village area	44%	38%	57%	59%	35%
Reno Midtown District	35%	38%	30%	39%	37%
Reno Riverwalk District	32%	30%	36%	40%	35%
Sparks – Sparks Marina	17%	19%	19%	23%	19%
Surrounding desert open space	11%	11%	13%	19%	12%
Tahoe Meadows – Mt. Rose Area	10%	8%	14%	27%	16%
Other, specify:	3%	3%	4%	0%	0%
Base	571	260	184	173	95

Question: Did you visit any of the following areas on your last trip to the Reno Tahoe region? Select all that apply.

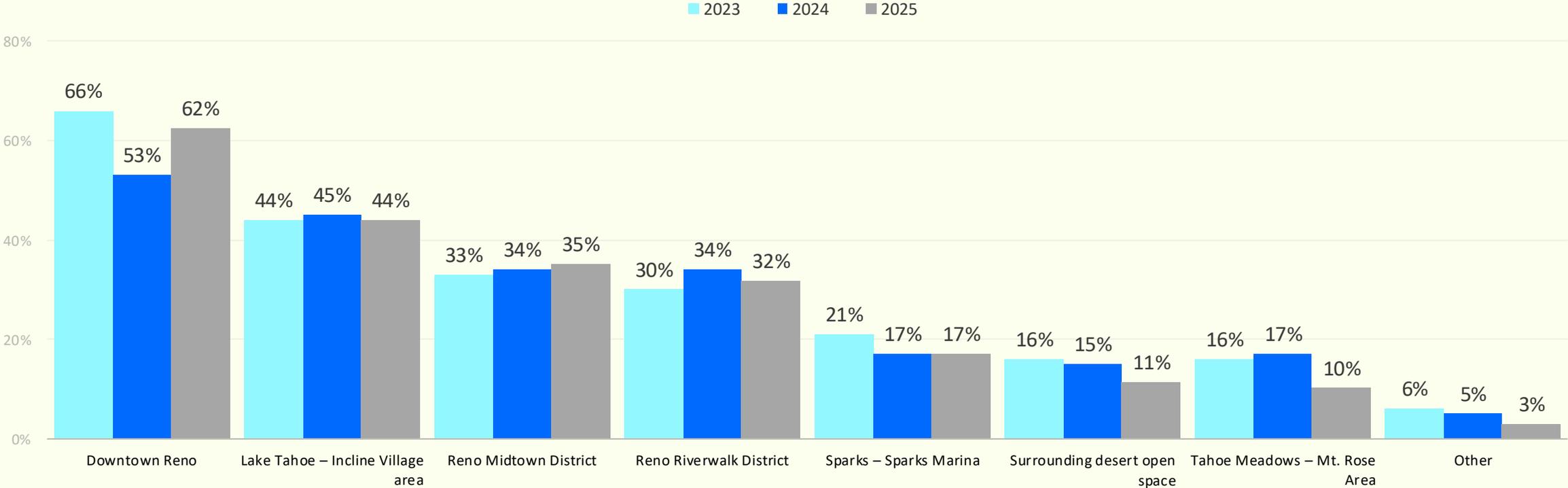
Base: 2025 overnight visitors. 571 completed surveys.

Note: Blue shading indicates segments that over index on the item compared to total, while red shading indicates segments that under index.

Downtown Reno rebounds in 2025, while secondary areas remain largely steady year over year.

Downtown Reno visitation rises in 2025 (+9 percentage points vs 2024), returning close to 2023 levels and signaling renewed strength in the core visitor hub. Secondary areas show relatively stable visitation across years, with only modest shifts suggesting the broader mix of places visitors include in their trip is holding steady.

Reno Tahoe Areas Visited Over Time



Question: Did you visit any of the following areas on your last trip to the Reno Tahoe region? Select all that apply.

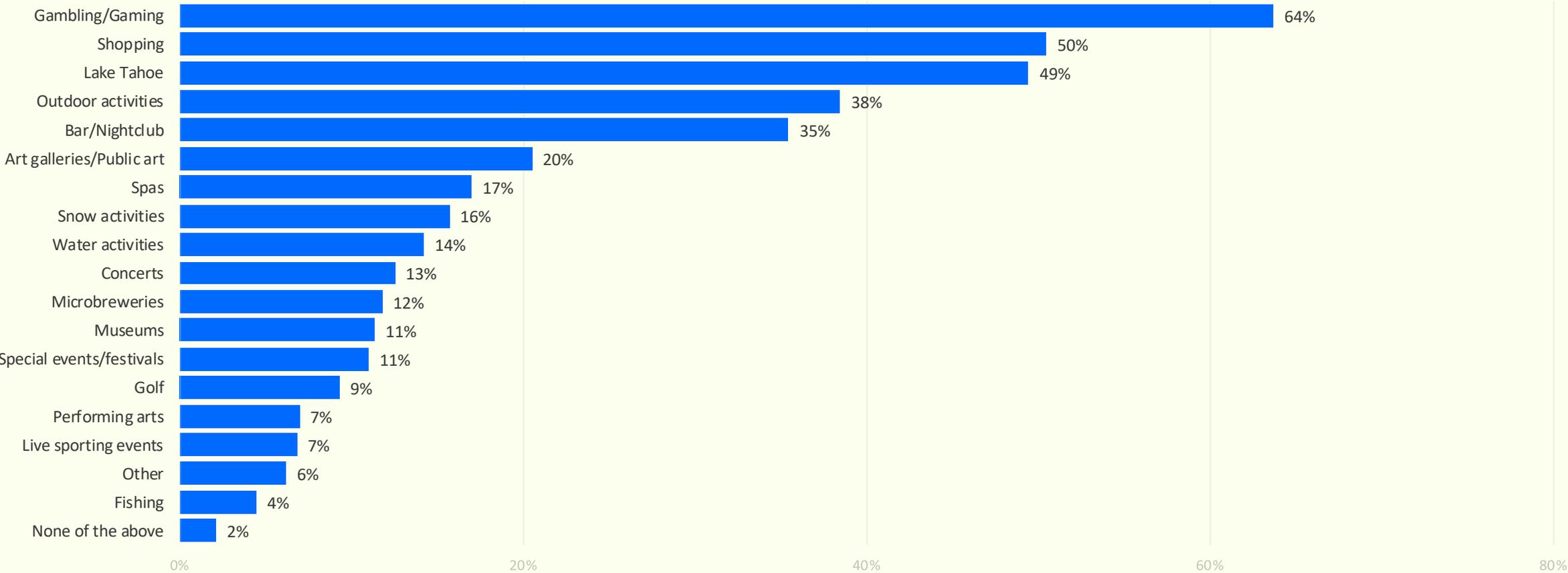
Base: Total overnight visitors. 1,673 completed surveys.

Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

Gaming participation strengthens alongside a broad activity mix.

The top activities in market were gambling (64%), shopping (50%), and visiting Lake Tahoe (49%), followed by outdoor activities (38%) and nightlife (35%).

In-Destination Activities



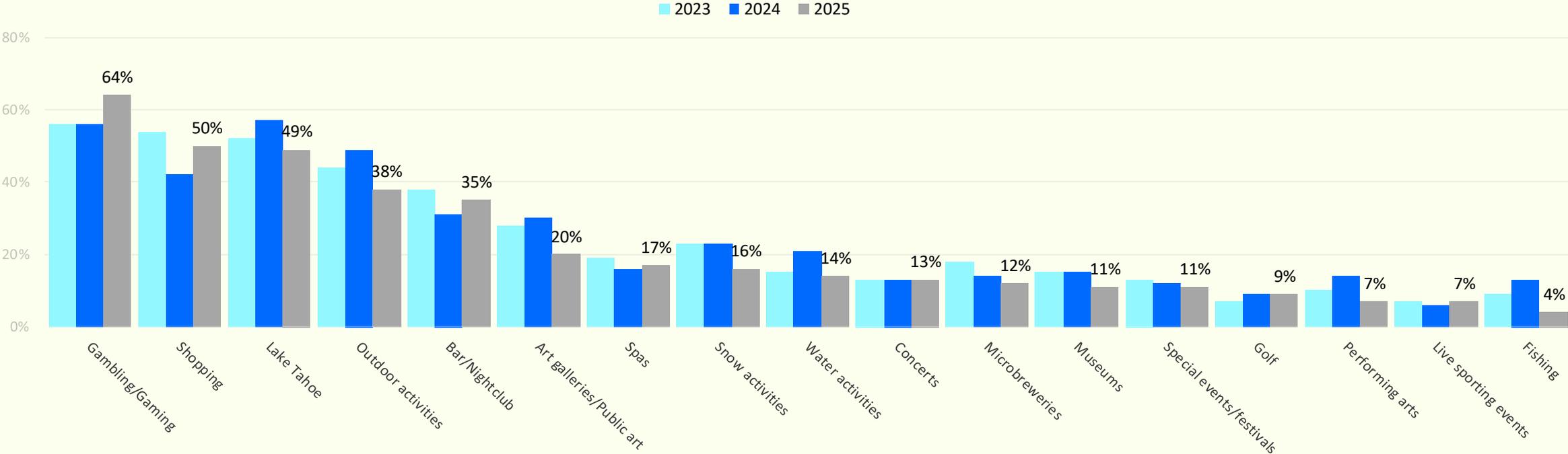
Question: What type of the following activities did you participate in on your last trip to the Reno Tahoe region? Select all that apply.

Base: 2025 overnight visitors. 571 completed surveys.

Gaming strengthens in 2025, while outdoor, events, and cultural participation provides a steady base.

Gaming rises in 2025 (+8 percentage points vs 2024), reinforcing one the destination’s key trip drivers and creating a larger pool of visitors who can be encouraged to add on other experiences. While participation in outdoor activities, events, and cultural attractions eases compared to 2024, these experiences continue to attract a meaningful share of visitors – indicating they remain a consistent part of the trip mix and can be grown through targeted signature moments such as festivals, limited-time exhibits, and other marquee programming.

In-Destination Activities Over Time



Question: What type of the following activities did you participate in on your last trip to the Reno Tahoe region? Select all that apply.
 Base: Total overnight visitors. 1,673 completed surveys.

Visitor value is rising in actual spend, but “value for the money” is the biggest strategic perception gap.

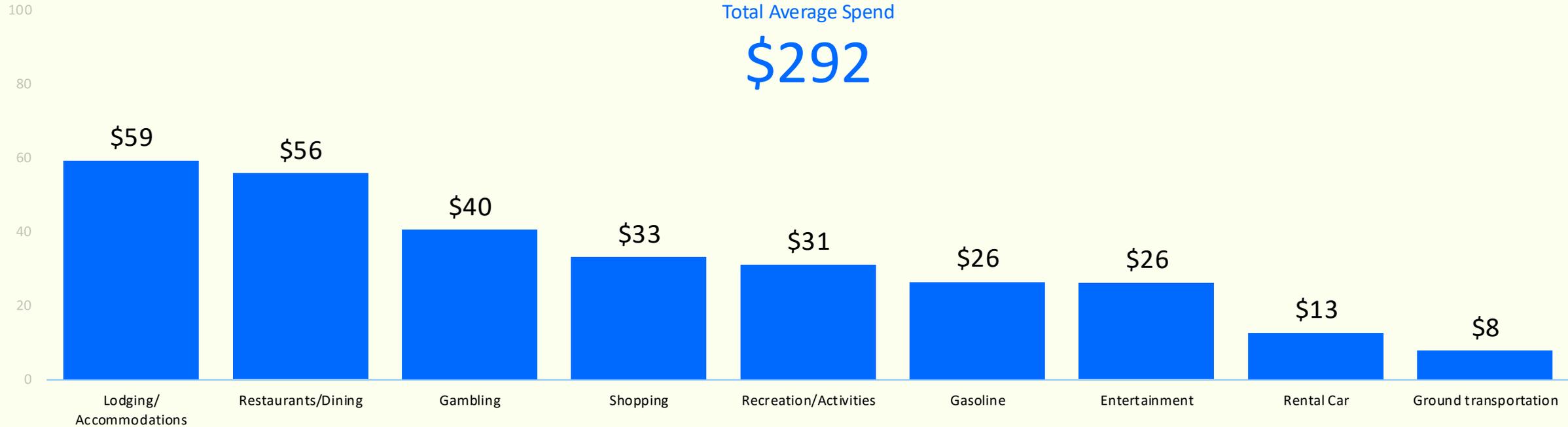
Among overnight visitors, the average daily spend per person was \$292. That amount converts to \$672 per party per day, accounting for 2.3 persons covered.

Lodging was the largest share of in-market spending (\$59), followed closely by dining (\$56).

Daily Spend per Person by Category

Average People Covered by Spend = 2.3 persons

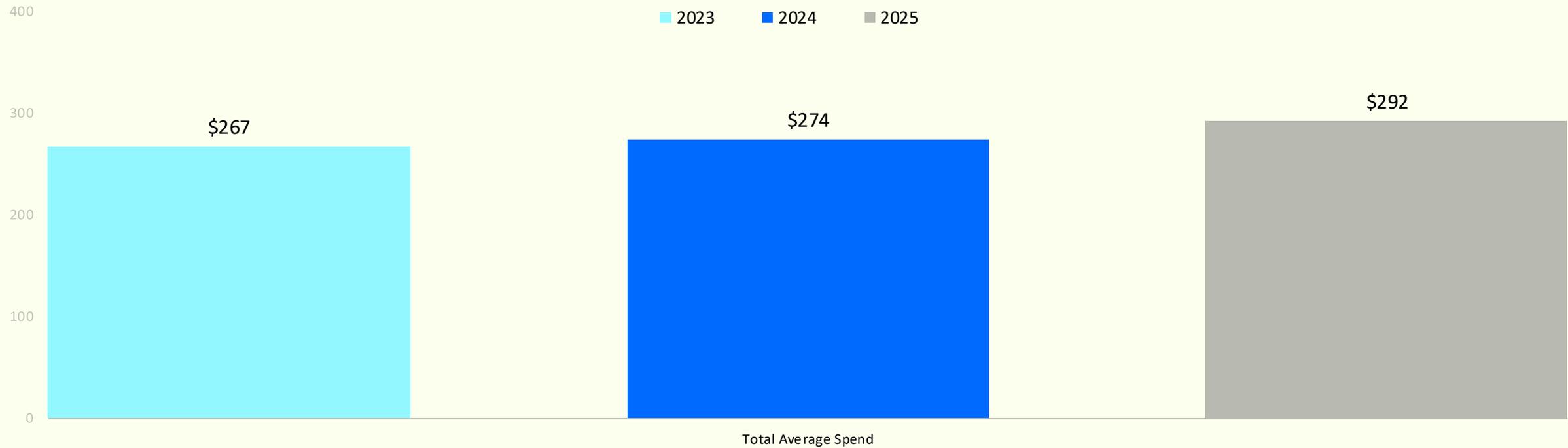
Average Length of Stay = 3.3 nights



Daily visitor spend reaches a three-year high in 2025, signaling increased visitor value and stronger in-destination conversion.

Average total daily spend per person has climbed steadily from \$267 in 2023 to \$274 in 2024, and up again to \$292 in 2025. Importantly, the 2025 increase appears broad-based across spending categories, rather than driven by a one-time spike in a single line item – suggesting visitors are spending more consistently throughout the day across multiple parts of the local economy.

Daily Spend per Person Over Time

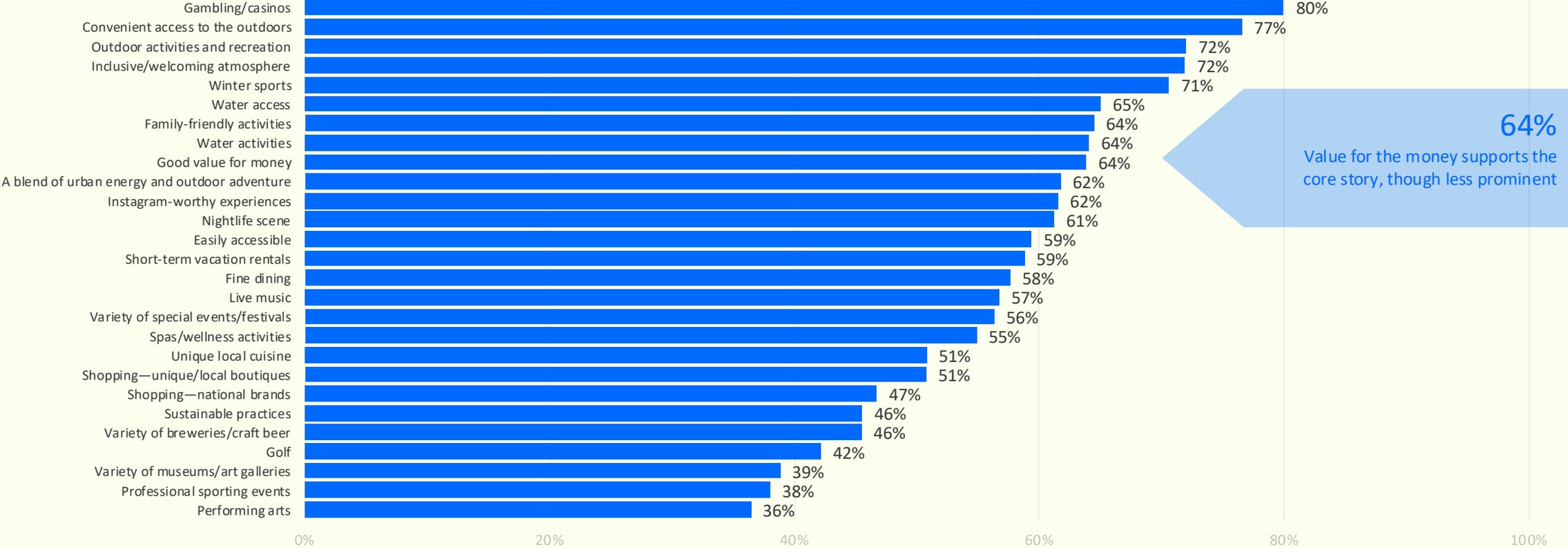


Question: On your last trip, approximately how much did you spend PER DAY in each of the following categories?
Base: Total overnight visitors. 1,216 completed surveys.

Overnight visitors strongly associate Reno Tahoe with gaming and the outdoors, aligning with the destination’s long-standing vision.

Gaming is the top attribute overnight visitors associate with the destination (80%), standing out clearly above the rest. A strong outdoor cluster follows, led by convenient access to the outdoors (77%), outdoor activities and recreation (72%), and winter sports (71%) – reinforcing the destination’s outdoor identity. Water-related attributes (65% access; 64% activities) sit a bit lower – suggesting Lake Tahoe is part of the destination’s appeal, but not as central to the overall brand perception.

Reno Tahoe Attribute Performance
 (% selecting agree + strongly agree)



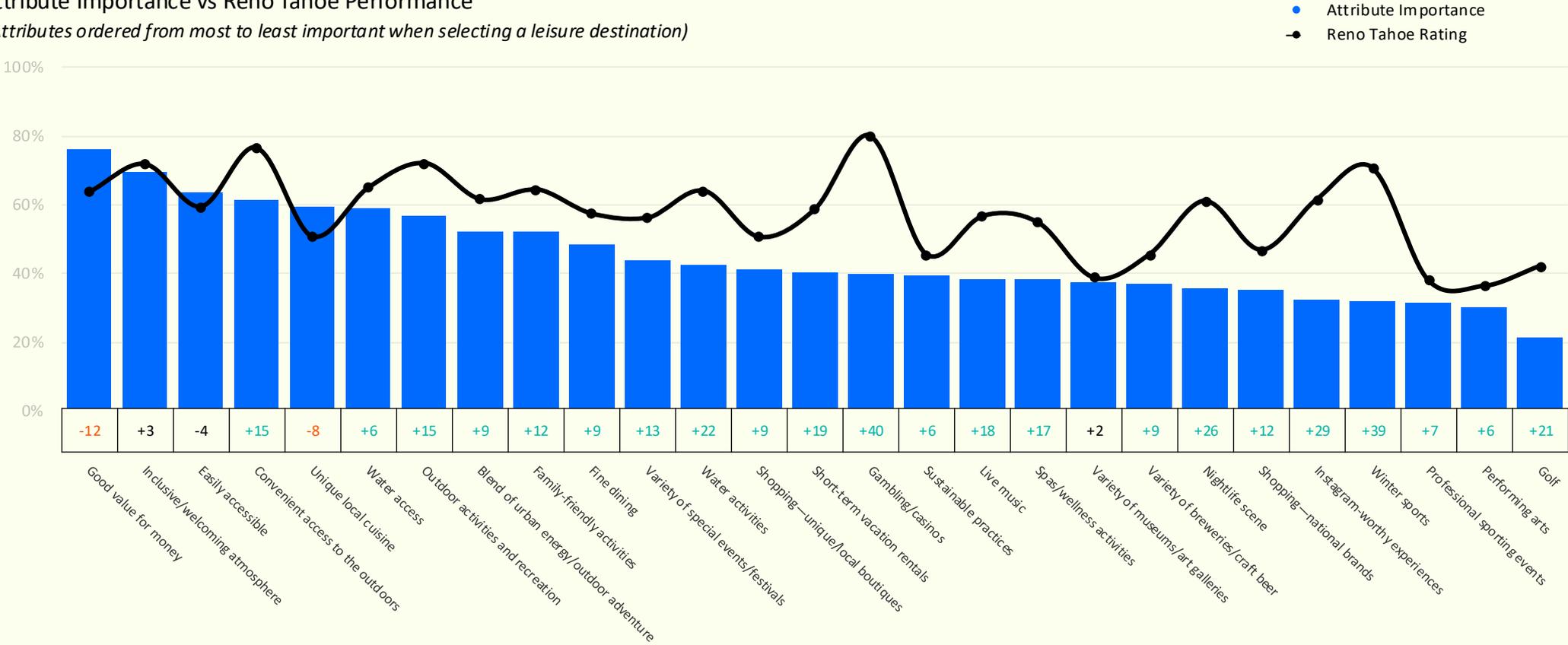
Question: For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not.

Base: 2025 overnight respondents. 571 completed surveys.

Reno Tahoe overperforms on most destination attributes but needs to strengthen perceptions of value.

Reno Tahoe excels on many destination attributes, especially those core to its brand: gaming (+40 percentage points), winter sports (+39pp), water activities (+22pp), special outdoor recreation (+15pp), events/festivals (+13pp), and performing arts (+6pp) to name a few. Yet it underperforms on the main attribute that drives destination choice: good value for the money (-12pp).

Attribute Importance vs Reno Tahoe Performance
 (Attributes ordered from most to least important when selecting a leisure destination)



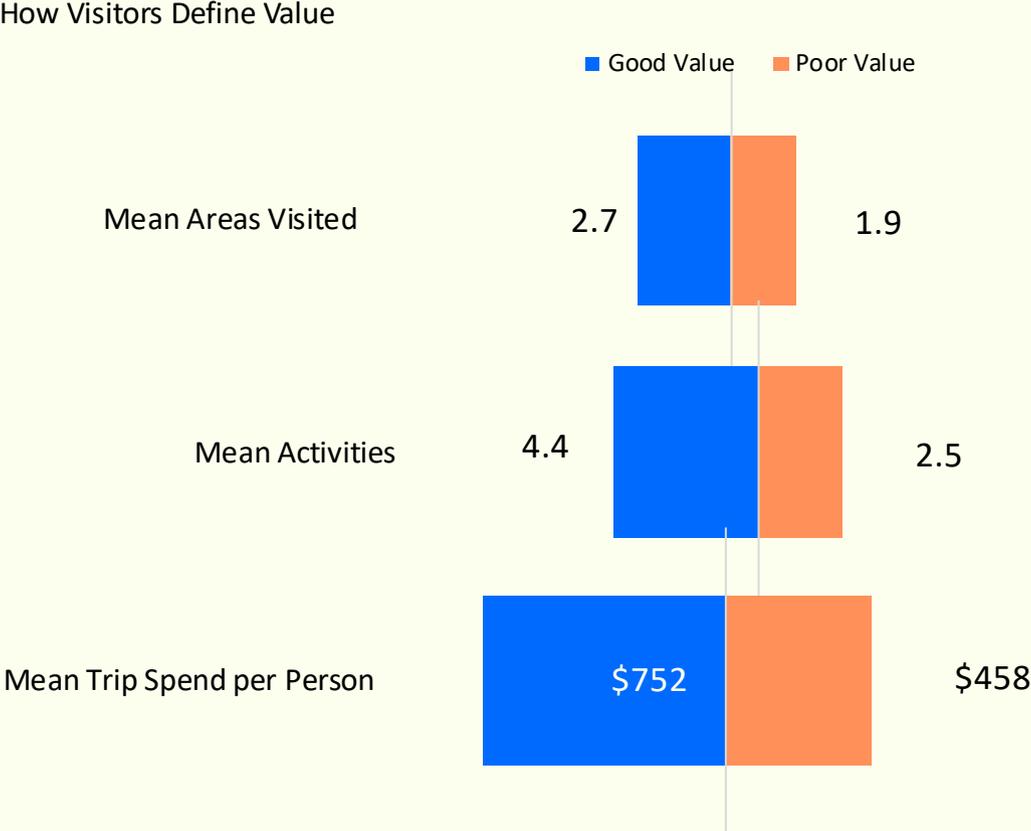
The chart maps the percent of travelers who rated each attribute as “Important” or “Very Important” when selecting a leisure destination (blue bars) against the percent who rated each attribute as “Agree” or “Strongly Agree” for Reno Tahoe (black line). Differences are evaluated using a chi-squared test of proportions. Deltas greater than 5 percentage points (item-dependent) are considered statistically significant at the 95% confidence level. The green and red text indicates attributes where Reno Tahoe over and under indexes, respectively.

Question: How important are the following to you when selecting a vacation destination? | For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not.

Base: 2025 overnight visitors. 571 completed surveys.

Overnight visitors who do more in Reno Tahoe are more likely to see the destination as good value for the money.

Overnight visitors who explore more of the destination (2.7 vs 1.9 areas visited), participate in more activities (4.4 vs 2.5), and therefore spend more overall (\$752 trip spend per person vs \$458) are more likely to view Reno Tahoe as good value for the money (vs poor value).



Question: You rated Reno Tahoe's "good value for the money" as [good/poor]. Which of the following contributed to your rating? Select all that apply.

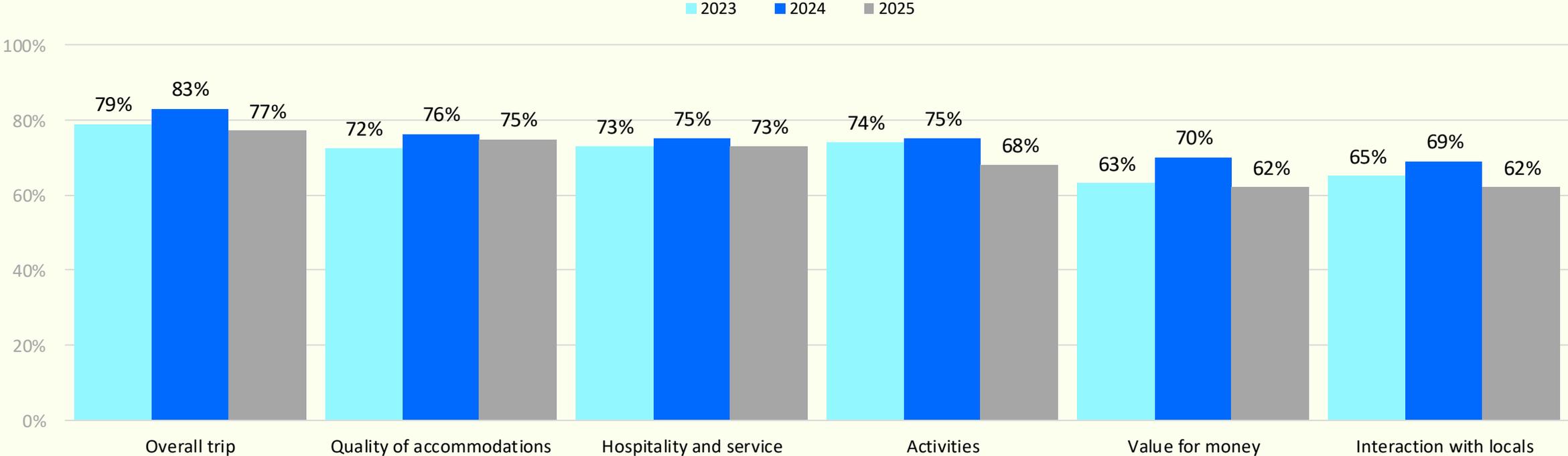
Base: 2025 overnight visitors who rated Reno Tahoe as good value or poor value. 437 completed surveys. Poor value segment has small base n < 100; results should be considered directional.

Satisfaction and advocacy remain strong, but softening is concentrated in value – posing a risk if left unaddressed.

Overall trip satisfaction softens, but accommodations remains a bright spot.

Visitor satisfaction has softened over time (-6 percentage points vs 2024), but ratings for Accommodations hold steady (-1pp). Activities (-7pp) and value (-8pp) declined the most, suggesting they are key contributors to the softening.

Trip Satisfaction Over Time
 (% showing 8 + 9 + 10 - extremely satisfied)



Question: On your most recent trip to Reno Tahoe, how satisfied are you with...?

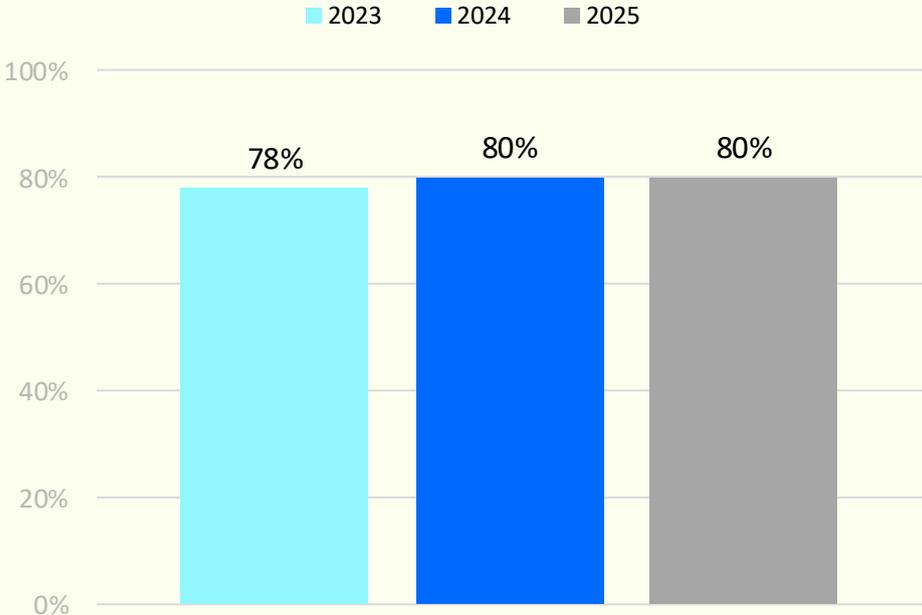
Base: Total overnight visitors. 1,673 completed surveys.

Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

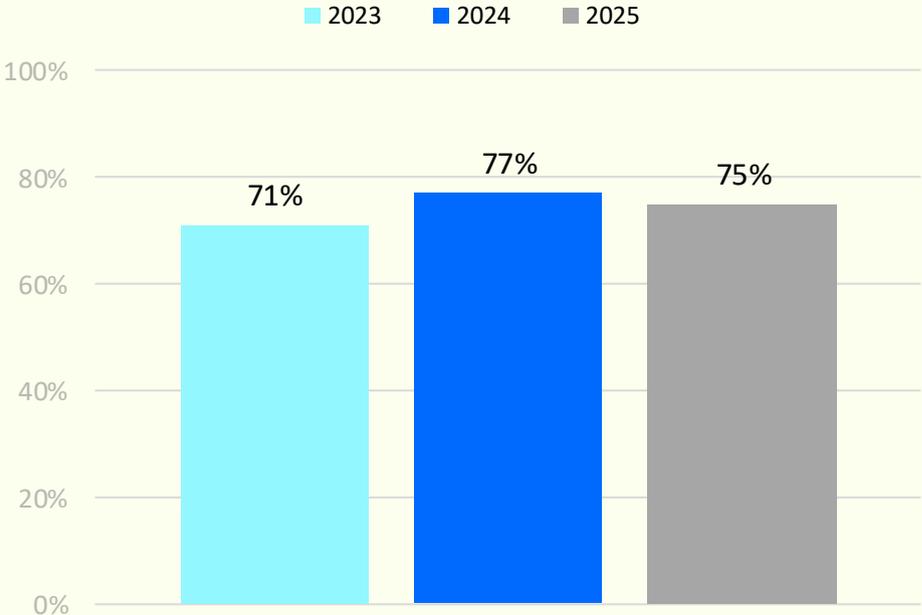
Advocacy is holding firm, as both metrics remain consistently high year over year.

Loyalty (0 percentage points vs 2024) and word-of-mouth recommendation (-2pp) remain strong and stable over time. The 2025 softening appears incremental rather than a meaningful downturn.

Likelihood to Return Over Time
(% showing 8 + 9 + 10 - extremely likely)



Likelihood to Recommend Over Time
(% showing 8 + 9 + 10 - extremely likely)



Question: How likely are you to return to the Reno Tahoe region in the future? | How likely are you to recommend the Reno Tahoe region as a place to visit to friends/family?

Base: Total overnight visitors. 1,673 completed surveys

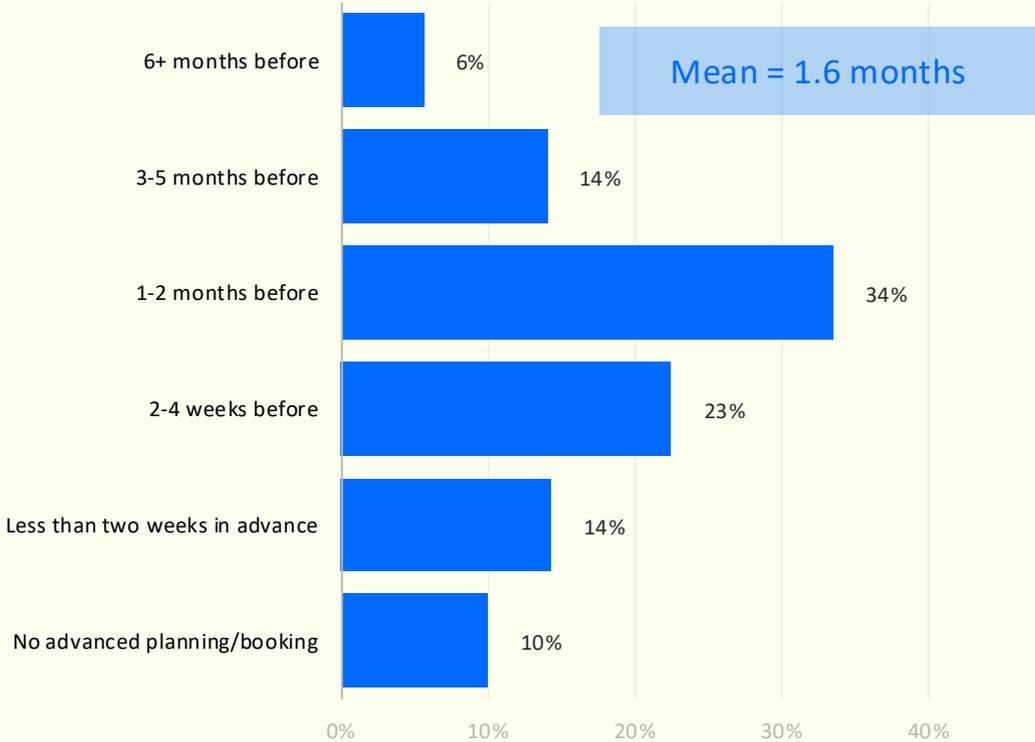
Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

**Trip planning is highly compressed,
creating strong opportunity to convert
demand efficiently.**

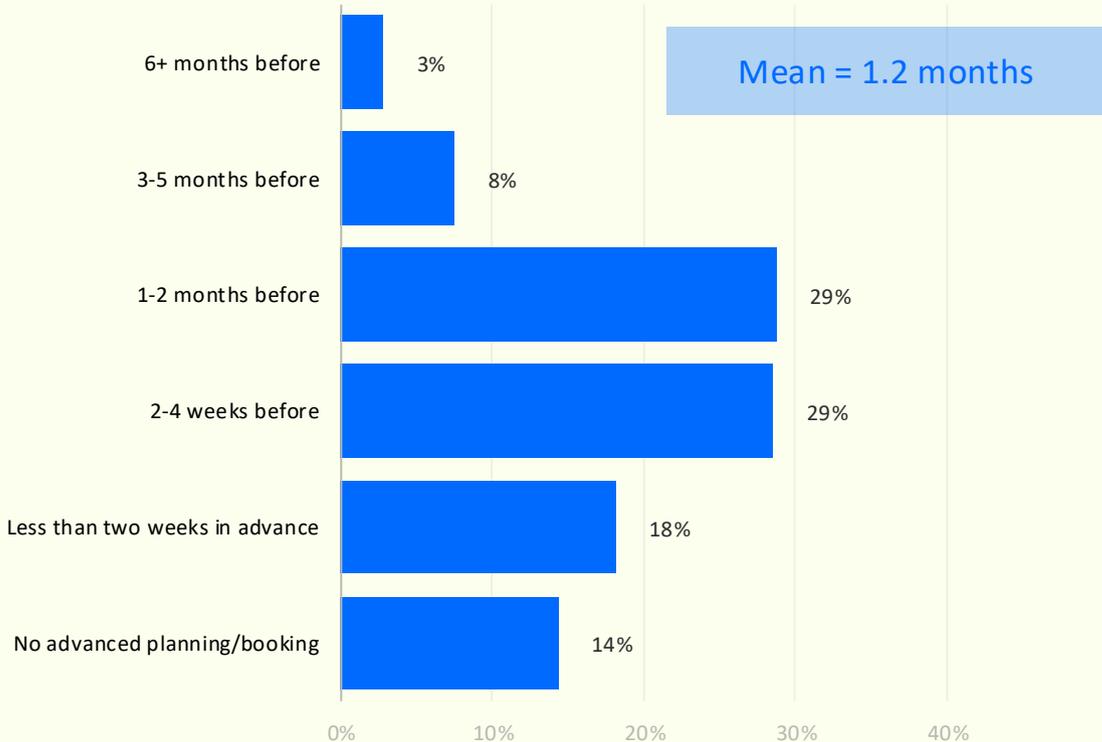
Short planning creates a clear opportunity to influence decisions near travel and convert that interest into booked experiences and paid stays.

Most overnight visitors begin planning less than two months out (81%), with an average planning window of 1.6 months. Bookings occur even closer – 1.2 months on average – with one third booking less than two weeks in advance or making no advanced bookings (32%).

Planning Window



Booking Window



Question: How far in advance did you begin planning and booking your last trip to Reno Tahoe?

Base: 2025 overnight visitors. 571 completed surveys.



Visit Reno Tahoe Brand Health & Ad Tracking 2025

Research Objectives & Methodology

This report presents findings from the 2025 Visit Reno Tahoe Brand Health & Ad Tracking Study, conducted on behalf of the Reno-Sparks Convention & Visitors Authority (RSCVA) by Future Partners.

The study is designed to strengthen understanding of the Reno Tahoe destination brand and evaluate the effectiveness of the current marketing campaign. Specifically, the research supports the following objectives:

- Understand travel attitudes, recent travel behavior, and future travel intentions
- Evaluate Reno Tahoe's brand attributes and brand health performance
- Assess Reno Tahoe's competitive position in the marketplace
- Measure marketing recall and aided advertising awareness

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+
- Takes at least one overnight leisure trip per year of at least 50 miles or more away from home

The survey was fielded through a trusted panel provider from November – December 2025. All quantitative data presented within this report is weighted based on the populations of the markets studied.



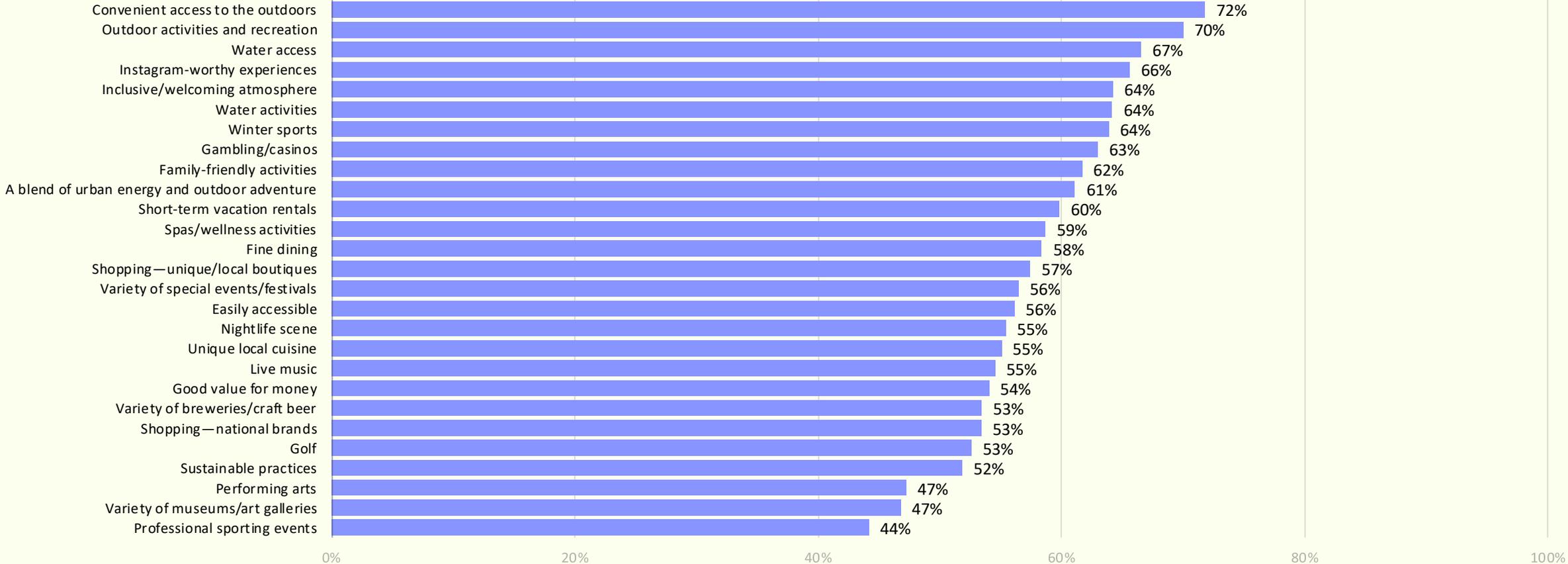
Executive Summary

Brand equity is strongest where Reno Tahoe is already known – the outdoors – the risk is underperformance on decision-driving attributes.

Reno Tahoe is most strongly associated with its outdoor-forward identity, reinforcing alignment with the destination’s vision.

Over seven-in-ten target travelers cite convenient access to the outdoors (72%) and outdoor recreation (70%) as the destination’s top attributes, followed by water access (67%), water activities (64%), and winter sports (64%). The destination also performs well on experiential appeal, with strong ratings for Instagram-worthy experiences (66%) and an inclusive, welcoming atmosphere (64%).

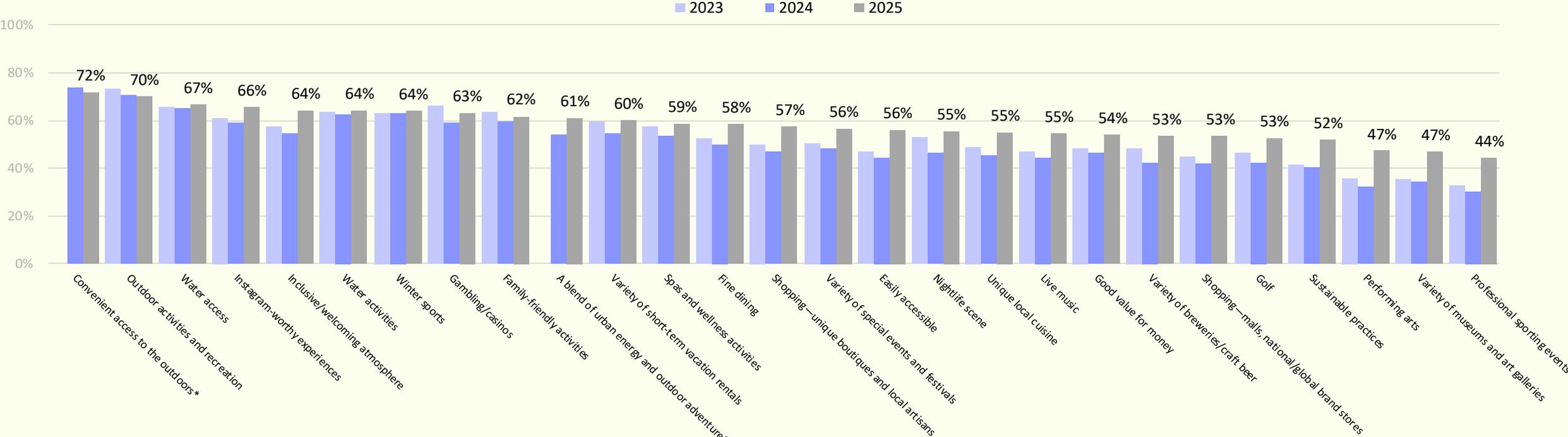
Reno Tahoe Attribute Performance
 (% selecting agree + strongly agree)



Reno Tahoe’s outdoor strength remains steady, while “urban experience” attributes show the biggest lifts.

Reno Tahoe consistently scores high on outdoor-oriented attributes: convenient outdoor access (-2 percentage points from 2024), outdoor recreation (-1pp), water access (+2pp), water activities (+2pp), and winter sports (+1pp). Mid- to lower-tier attributes also show clear lifts compared to prior years, led by value and culture: blend of urban energy and outdoor adventure (+7pp), fine dining (+9pp), special events/festivals (+8pp), nightlife (+9pp), unique local cuisine (+10pp), live music (+10pp), good value for money (+8pp), performing arts (+15pp), museums/galleries (+12pp), and sporting events (+14pp).

Reno Tahoe Attribute Performance Over Time
(% selecting agree + strongly agree)



Question: For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not.

Base: 2025 respondents. 1,600 completed surveys.

*Note: Attribute not asked in 2023. Due to methodological changes between 2023 and 2024, shifts should be considered directional.

Reno Tahoe overperforms on core brand attributes but needs to strengthen perceptions of value, accessibility, and cultural depth.

Reno Tahoe excels on many destination attributes, especially those core to its brand: gaming (+26 percentage points), winter sports (+23pp), golf (+18pp), water activities (+15pp), outdoor recreation (+13pp), access to the outdoors (+6pp), performing arts (+5pp), and variety of festivals/events (+4pp). Yet it underperforms on the attributes that drive destination choice: good value (-22pp), accessibility (-11pp), unique cuisine (-9pp), family-friendly activities (-7pp), and a welcoming atmosphere (-7pp).

Attribute Importance vs Reno Tahoe Performance
 (Attributes ordered from most to least important when selecting a leisure destination)



The chart maps the percent of travelers who rated each attribute as “Important” or “Very Important” when selecting a leisure destination (purple bars) against the percent who rated each attribute as “Agree” or “Strongly Agree” for Reno Tahoe (black line). Differences are evaluated using a chi-squared test of proportions. Deltas greater than 3 percentage points (item-dependent) are considered statistically significant at the 95% confidence level. The green and red text indicates attributes where Reno Tahoe over and under indexes, respectively.

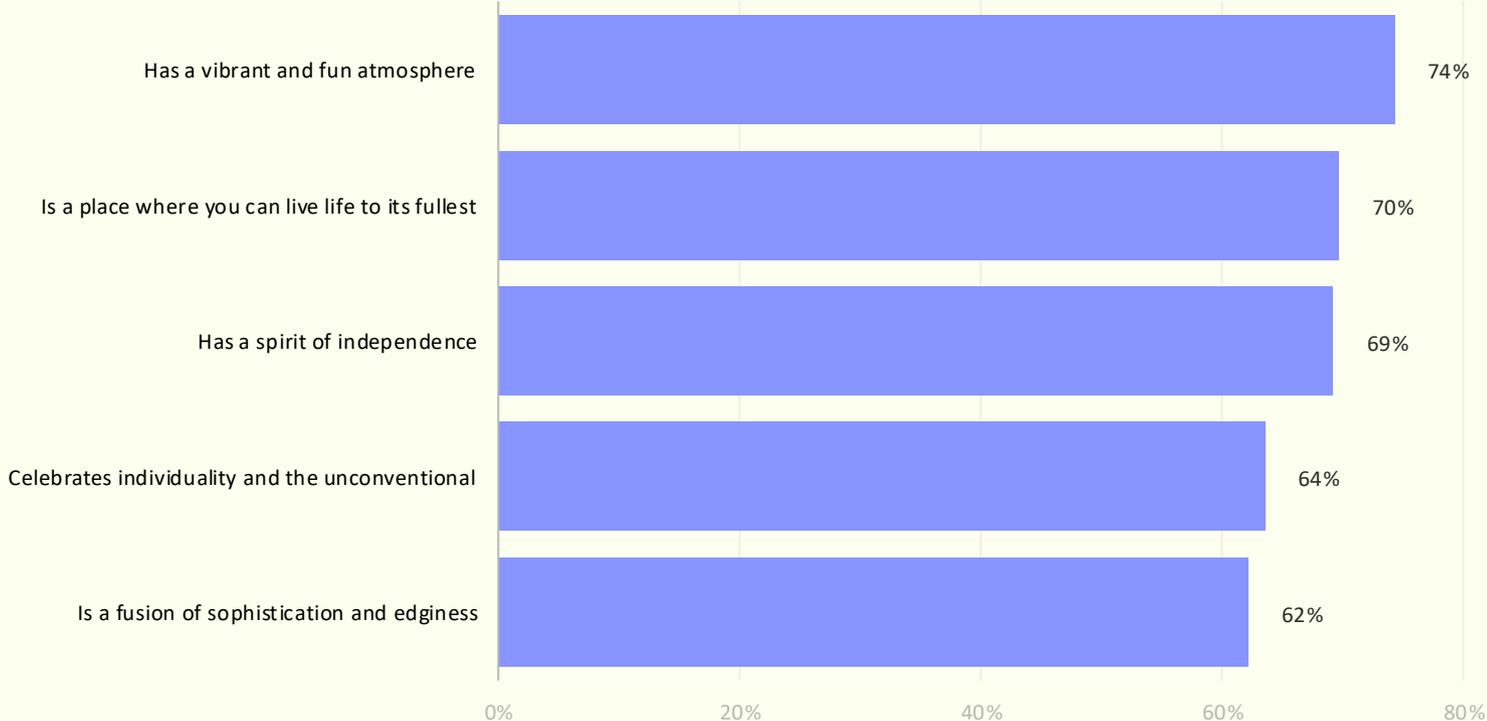
Question: How important are the following to you when selecting a vacation destination? | For each attribute below, please select how much you agree or disagree Reno Tahoe delivers on that attribute, whether you have been before or not.

**Reno Tahoe's vibe is strengthening –
and becoming increasingly
differentiated.**

Reno Tahoe’s “vibrant and fun atmosphere” resonates with most target travelers (74%).

Approximately seven-in-ten also says it’s a place where you can live life to the fullest (70%) and that it has a spirit of independence (69%), while slightly smaller shares agree the destination celebrates individuality (64%) and represents a fusion of sophistication and edginess (62%).

Brand Attribute Performance
(% selecting agree + strongly agree)



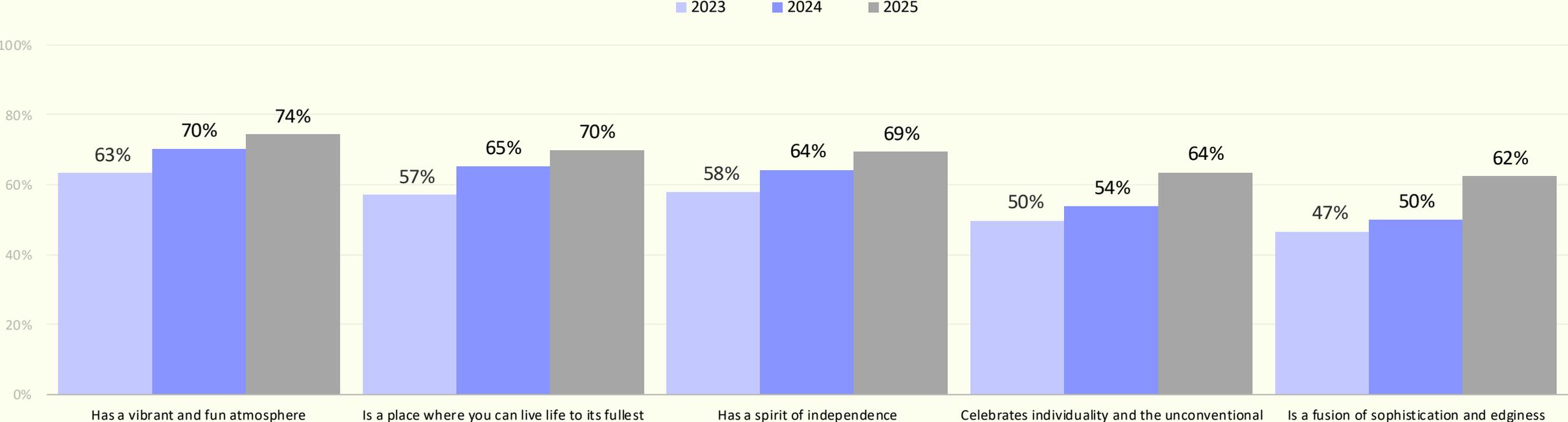
Question: For each option below, please select how much you agree or disagree that it describes Reno Tahoe, whether you have been before or not.

Base: 2025 respondents. 1,600 completed surveys.

Reno Tahoe’s brand associations deepen across the board, with the biggest lifts in individuality and edgy sophistication.

Reno Tahoe’s brand perceptions are gaining momentum across the board year over year, indicating that the destination’s vibe is landing more clearly with target travelers. The largest increases include celebrating individuality and the unconventional (+10 percentage points vs 2024) and fusion of sophistication and edginess (+12pts) – perceptions that can help differentiate Reno Tahoe from its competitive set.

Brand Attribute Performance Over Time
 (% selecting agree + strongly agree)



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: 2025 respondents. 1,600 completed surveys.

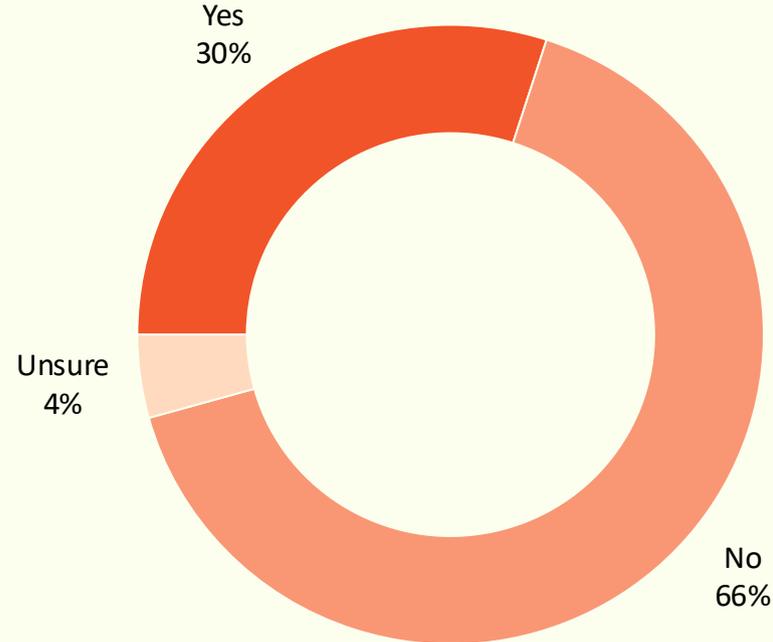
Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

Paid media is breaking through –
reaching a record high – and driving
action.

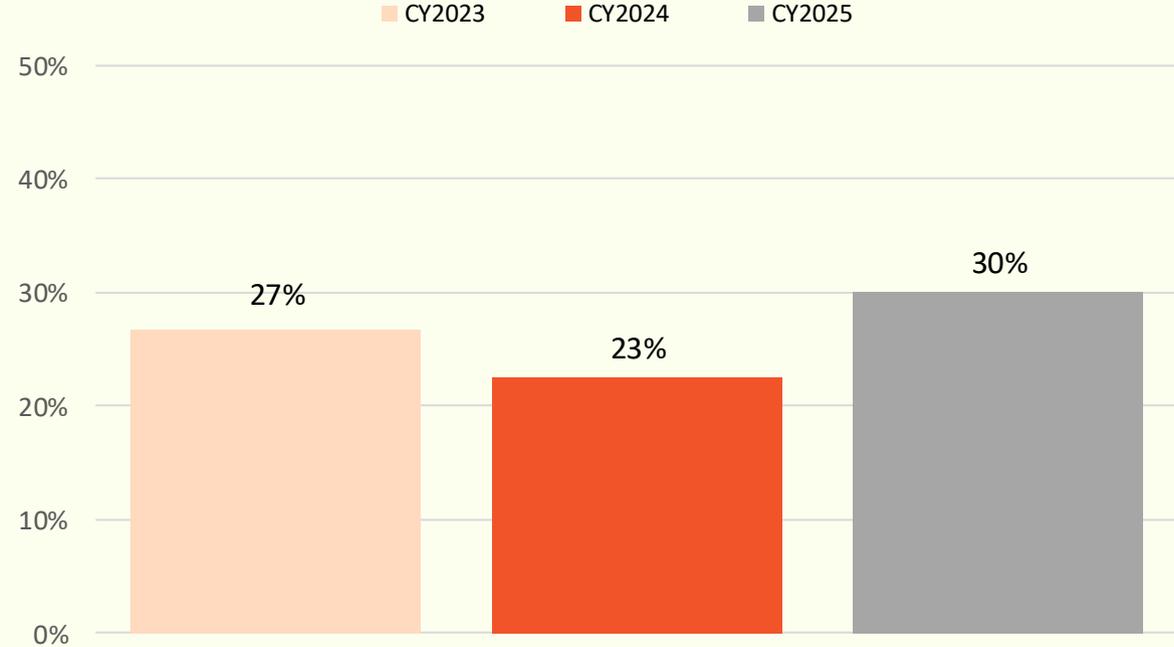
About one third of target travelers (30%) recall seeing paid advertising for Reno Tahoe in the past six months, reaching a new high in 2025.

Target travelers were shown a series of paid ads and asked whether they had seen those or similar ads in the past six months. Aided recall improved to 30 percent, up 7 percentage points since 2024.

Reno Tahoe Paid Media Recall



Reno Tahoe Paid Media Recall Over Time



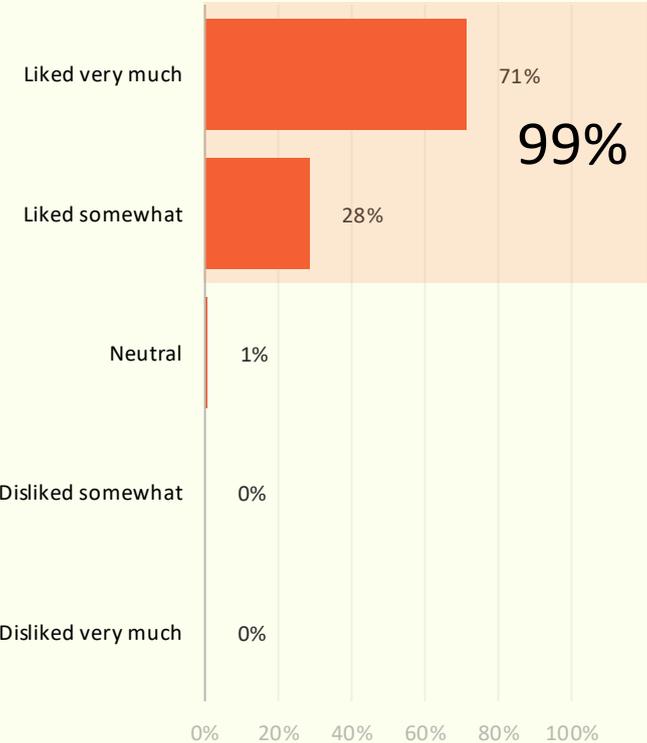
Question: Have you seen these or similar ads, sponsored social media posts, billboards, and/or articles for Reno Tahoe in the past 6 months?

Base: 2025 respondents. 554 completed surveys. Total respondents. 3,118 completed surveys.
Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

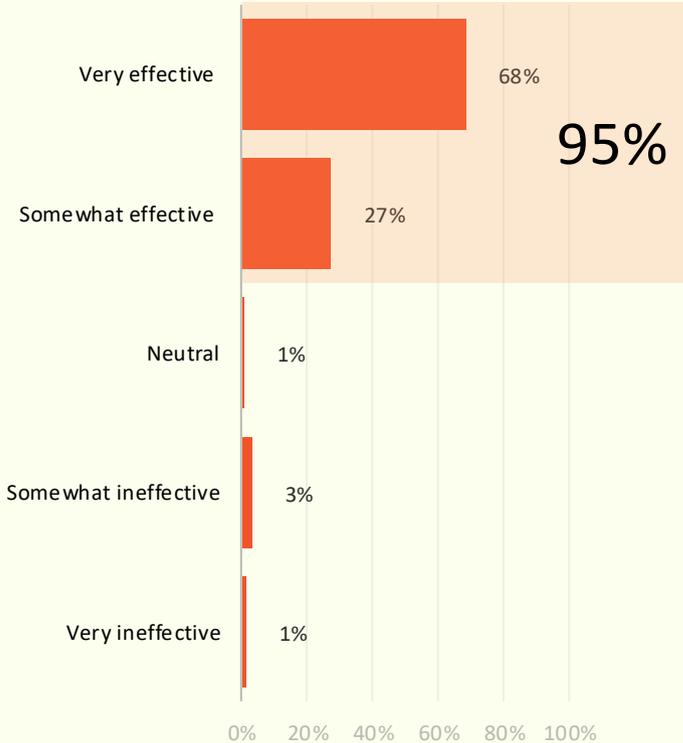
Reno Tahoe ads are landing strongly and driving meaningful trip-planning behavior among paid-aware travelers.

Ad likeability is overwhelmingly positive, as most paid aware travelers rate the ads favorably (99%) and agree they effectively portray Reno Tahoe as a place they would enjoy visiting for leisure (95%). More importantly, the campaign is moving travelers beyond awareness into action, as most engaged in one positive action post exposure (96%).

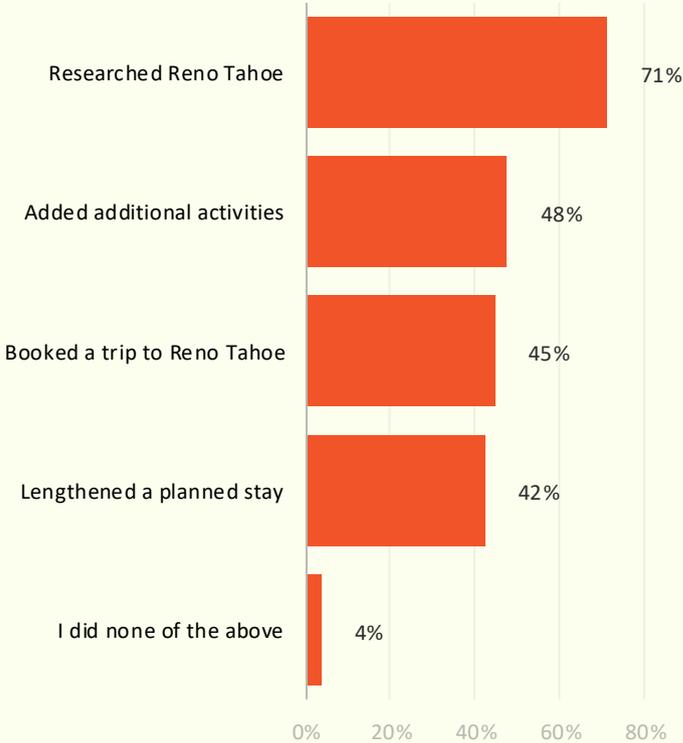
Ad Likeability



Ad Effectiveness



Actions Taken After Seeing Ad



Question: How much did you like or dislike these ads? | How effective were the ads in portraying Reno Tahoe as a place you would enjoy visiting for leisure? | Which of the following did you do after seeing an ad for Reno Tahoe?

Base: 2025 paid aware respondents. 166 completed surveys.

A woman with long blonde hair, wearing a black tank top, blue shorts, and a blue and grey baseball cap, is walking on a dirt path in a desert landscape. She is smiling and looking towards the sun, which is low on the horizon, creating a warm, golden glow. The background features rolling hills and sparse desert vegetation.

**Visit Reno Tahoe
Resident Sentiment 2025**

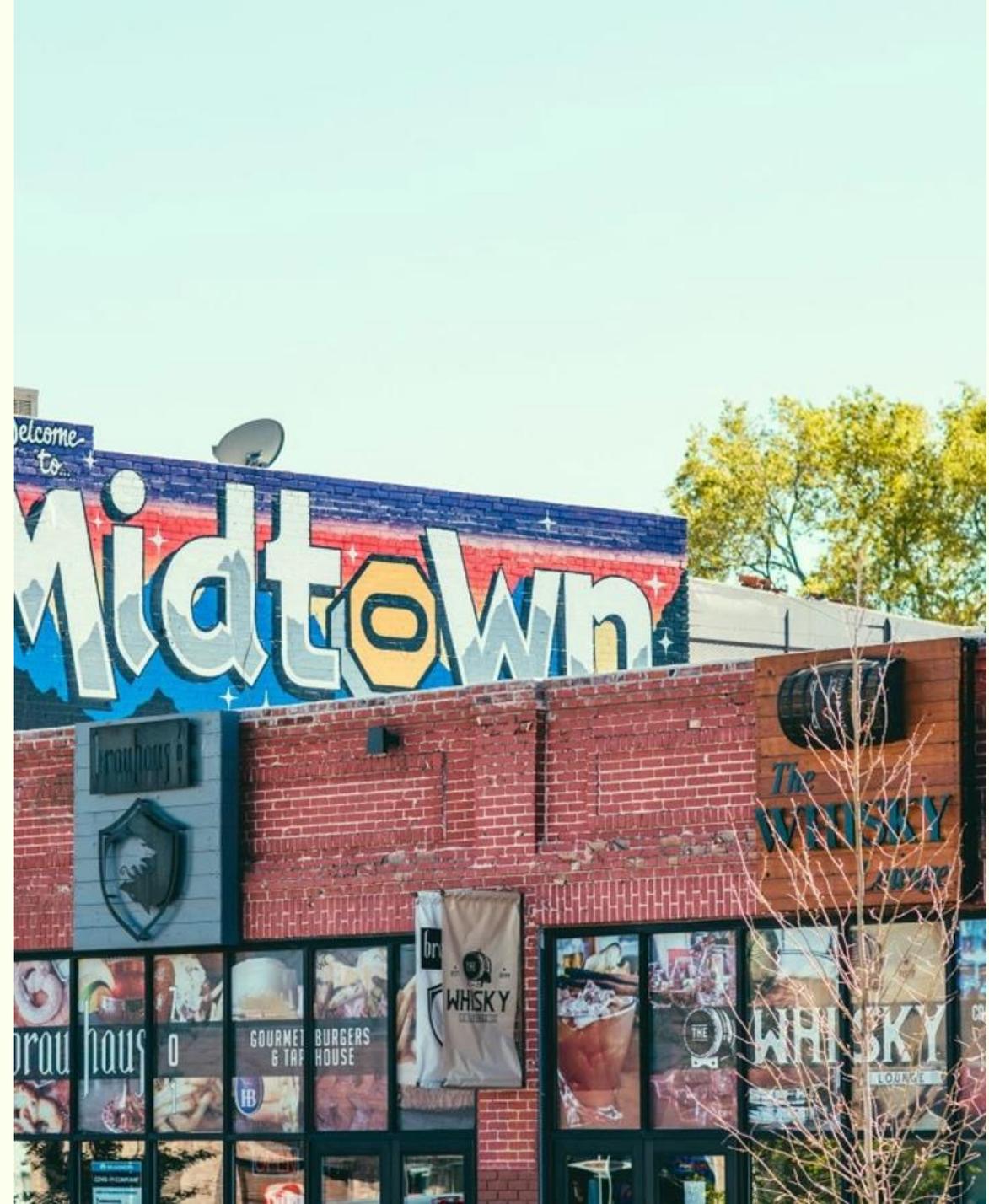
Research Objectives & Methodology

This report presents findings from the 2025 Visit Reno Tahoe Resident Sentiment Study, conducted on behalf of the Reno-Sparks Convention & Visitors Authority (RSCVA) by Future Partners.

The primary objective of this research is to understand how Washoe County residents perceive tourism – and how they believe tourism influences quality of life. Specifically, the research examines:

- Resident perceptions of tourism in Washoe County
- Tourism’s perceived role in shaping overall quality of life
- Perceived impacts of tourism on the economy, workforce, and community

Future Partners conducted an online survey of N=400 Washoe County residents who are adults age 18 and older. The survey was fielded through a trusted panel provider from May 2025 – January 2026. All quantitative data presented within this report is weighted based on county demographics.



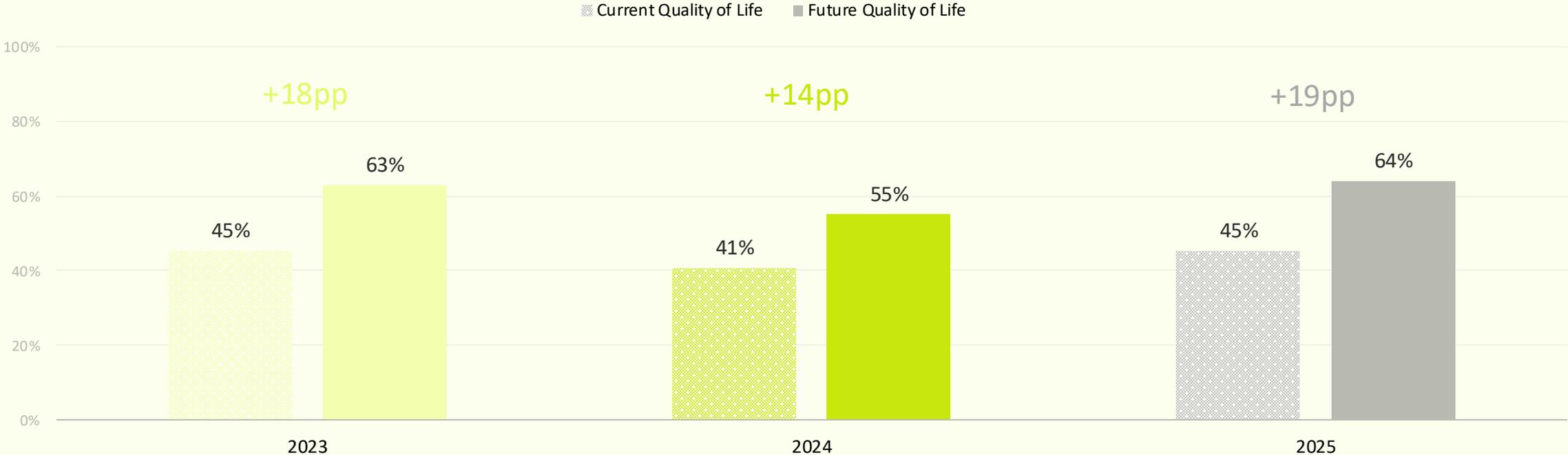
Executive Summary

Residents are broadly optimistic about life in Washoe County.

Washoe County residents remain consistently optimistic – and that optimism gap is strongest in 2025 (+19 percentage points).

In every survey year, more residents expect their quality of life to improve in the next year than say it's improved since the prior year. This optimism gap suggests residents feel better about what's ahead than what they've recently experienced.

Quality of Life Over Time
(% somewhat better + much better)



Question: Compared to one year ago, how would you rate your personal quality of life? | Thinking one year ahead, how do you expect your personal quality of life to change?

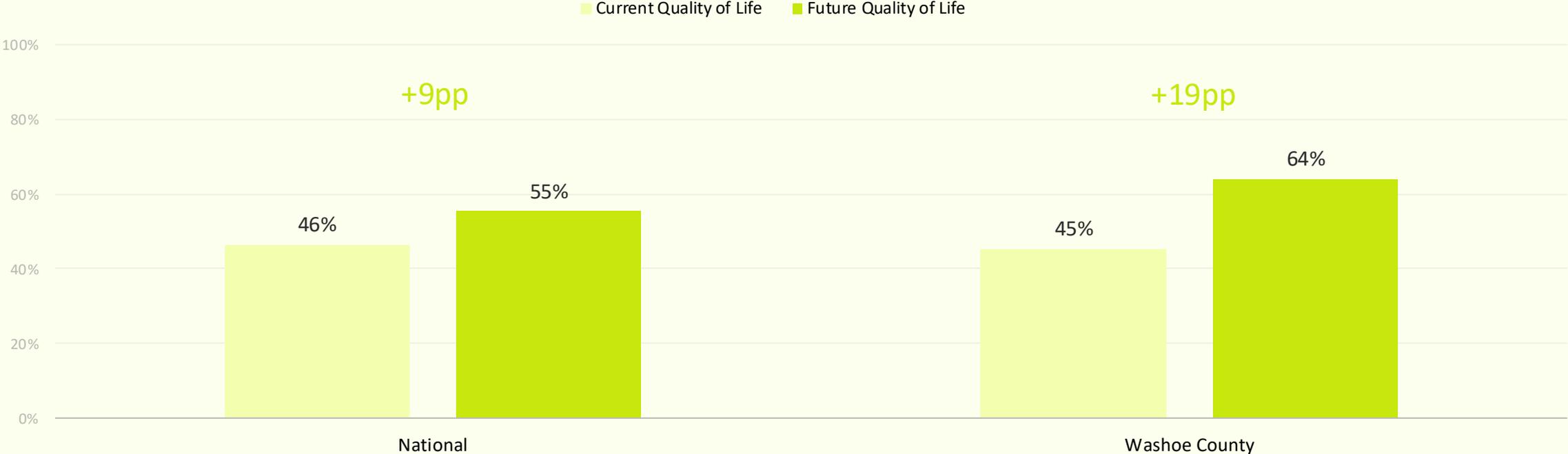
Base: Total Washoe County residents. 1,276 completed surveys.

Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

Washoe County residents have a more positive outlook on their quality of life compared to the average American traveler.

Washoe County residents show a larger optimism gap than the average American traveler (+19 percentage points vs +9pp): they are confident that their future looks meaningfully better than what they've recently experienced – and more strongly than people do nationally.

Quality of Life: National Benchmark
(% somewhat better + much better)



Question: Compared to one year ago, how would you rate your personal quality of life? | Thinking one year ahead, how do you expect your personal quality of life to change?

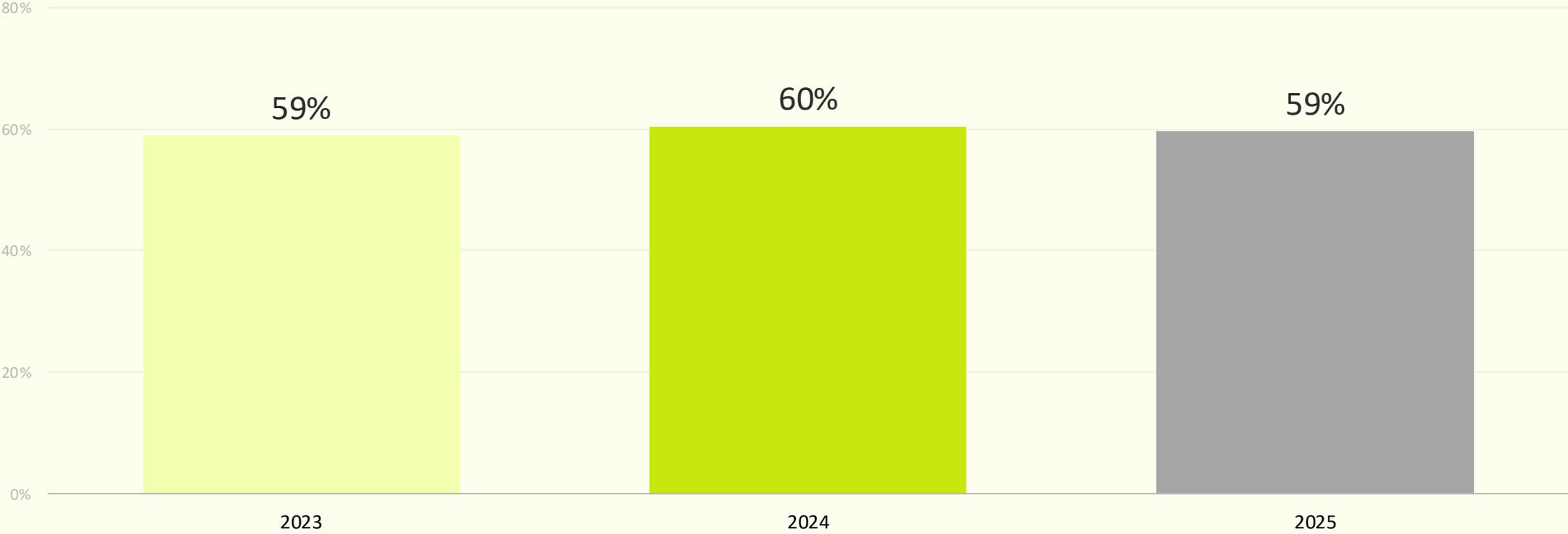
Base: 2025 Washoe County residents. 400 completed surveys. June 2025 American travelers. 1,988 completed surveys.

Residents hold positive perceptions about Washoe County's tourism industry.

Washoe County’s local tourism industry remains strong and stable over time.

Residents consistently rate the local tourism industry as positive (59% on average).

Local Tourism Industry Perceptions Over Time
(% selecting somewhat positive + extremely positive)



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

Base: Total Washoe County residents. 1,276 completed surveys.

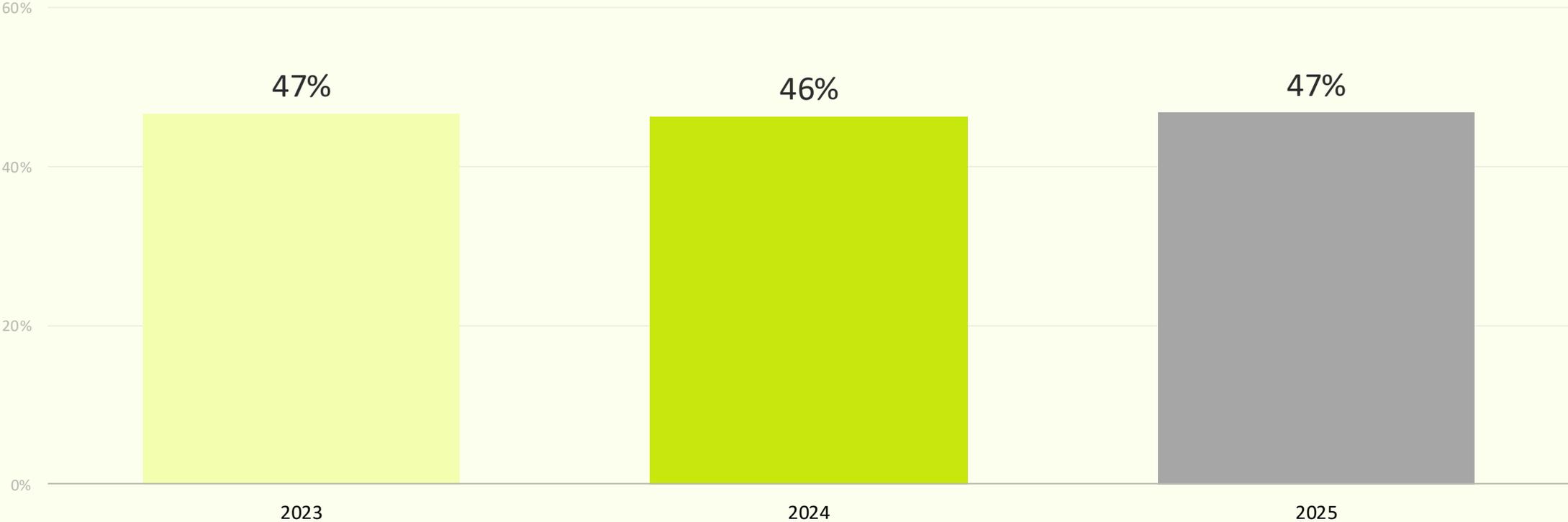
Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

The perception that Washoe County’s tourism results in a better quality of life has been strong and stable over the years.

Residents consistently say the local tourism industry results in a better quality of life for them and their family (47% on average).

Local Tourism Impact on Quality of Life Over Time

(% selecting agree + strongly agree)



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

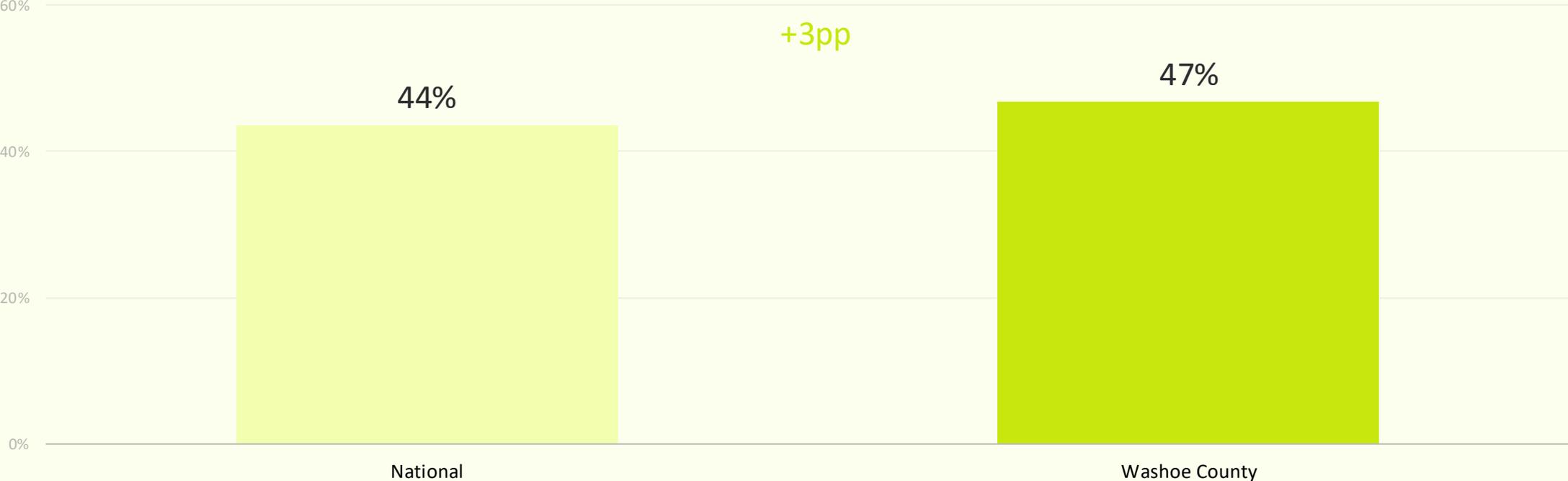
Base: Total Washoe County residents. 1,276 completed surveys.

Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

Washoe County residents view tourism’s impact on their quality of life more favorably than the average American traveler.

Residents are more likely to agree that their tourism industry results in a better quality of life for them and their families compared to the national sample (+3 percentage points).

Local Tourism Impact on Quality of Life: National Benchmark
(% selecting agree + strongly agree)



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: 2025 Washoe County residents. 400 completed surveys. June 2025 American travelers. 1,988 completed surveys.

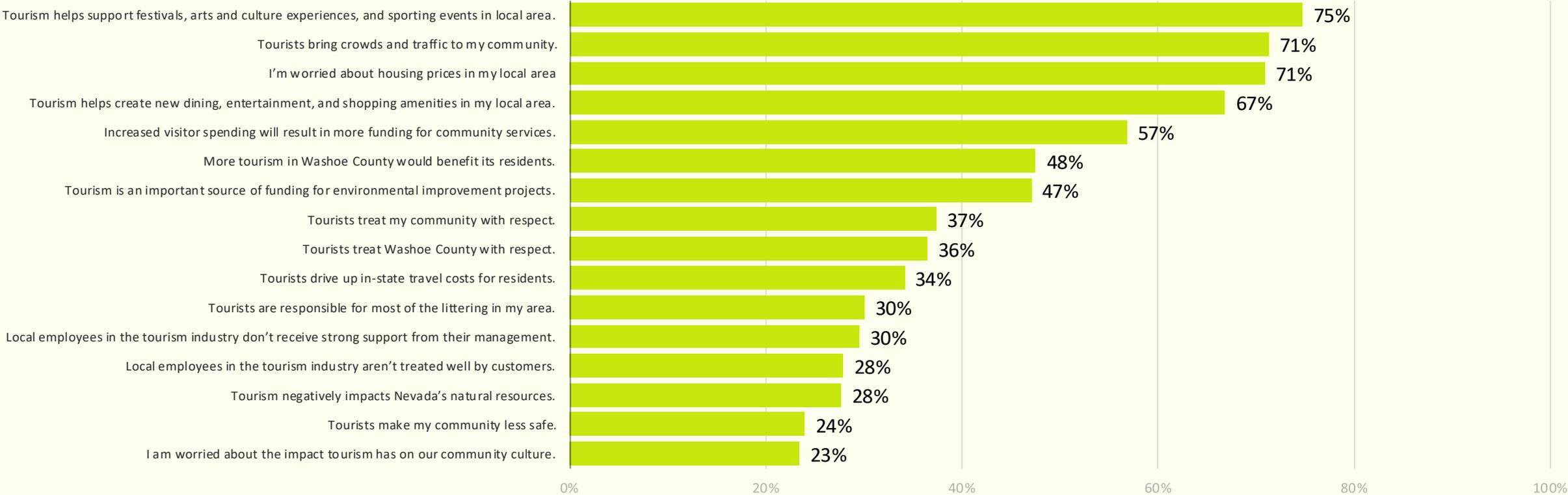
Support for tourism is real and benefited – though crowds and traffic are major friction points.

The top impacts of tourism on the community illustrate resident awareness of both its benefits and friction points.

Importantly, residents recognize that tourism helps support arts, culture, and events in the local area (75%). However, the next two leading impacts represent areas of concern: crowds/traffic (71%) and housing prices (71%).

Tourism Industry Impact on Community

(% selecting agree + strongly agree)



Question: Thinking about tourism and its impact on your community, 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."

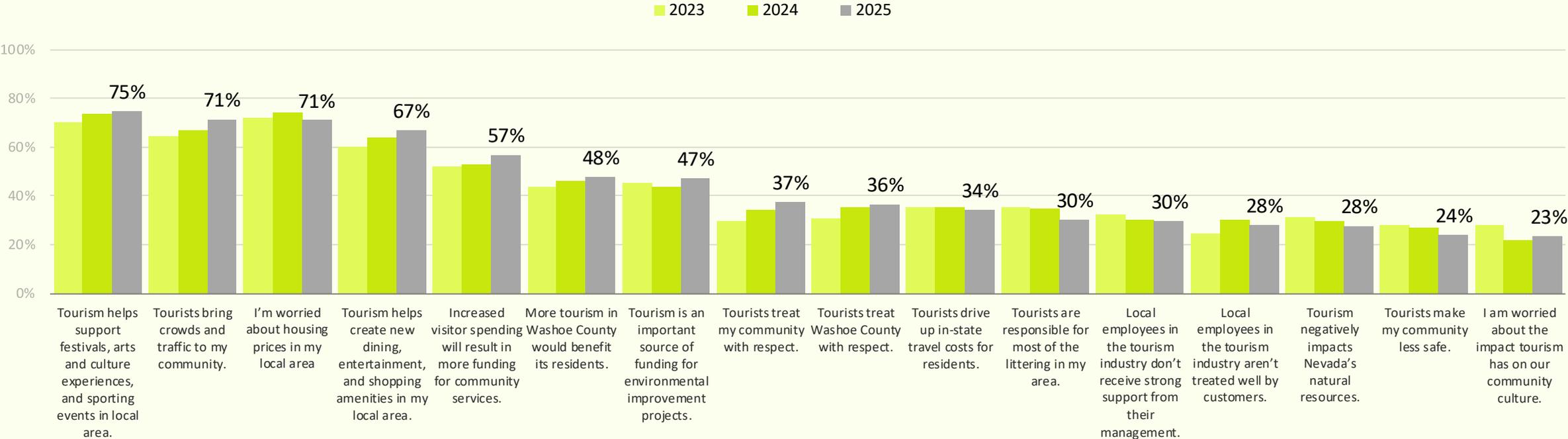
Base: 2025 Washoe County residents. 400 completed surveys.

Perceptions about tourism’s impact on the local community have been improving – though crowds and traffic are the key watchout.

Over time, residents increasingly recognize tourism’s benefits to the community, for example how it supports arts, culture, and events (+5 percentage points vs 2023), creates dining, entertainment, and shopping options (+7pp), and results in more funding for community services (+5pp). At the same time, they report fewer negative impacts overall, but concerns about crowds and traffic have continued to rise (+7pp).

Tourism Industry Impact on Community Over Time

(% selecting agree + strongly agree)



Question: Thinking about tourism and its impact on your community, 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.”

Base: Total Washoe County residents. 1,276 completed surveys.

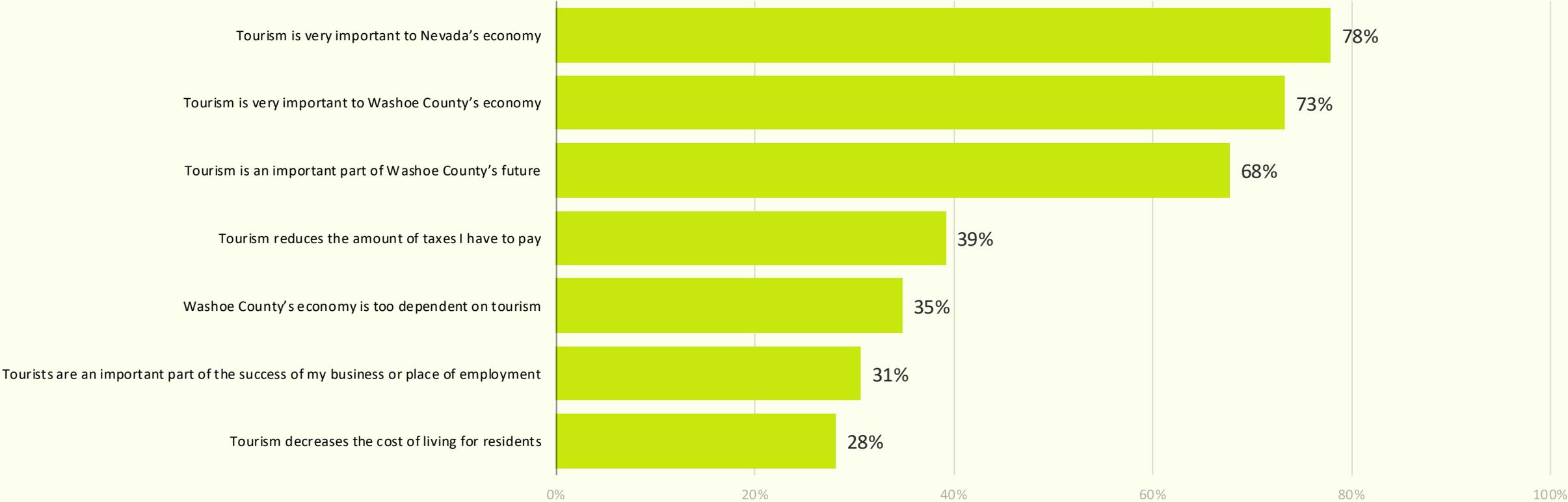
Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

Tourism is essential for the county's economy – though residents don't experience the personal cost relief.

Most residents believe that tourism benefits the state’s economy (78%), the county’s economy (73%), and the county’s future economy (68%).

Tourism Industry Impact on Economy

(% selecting agree + strongly agree)



Question: Thinking about tourism and its impact on the economy, 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.”

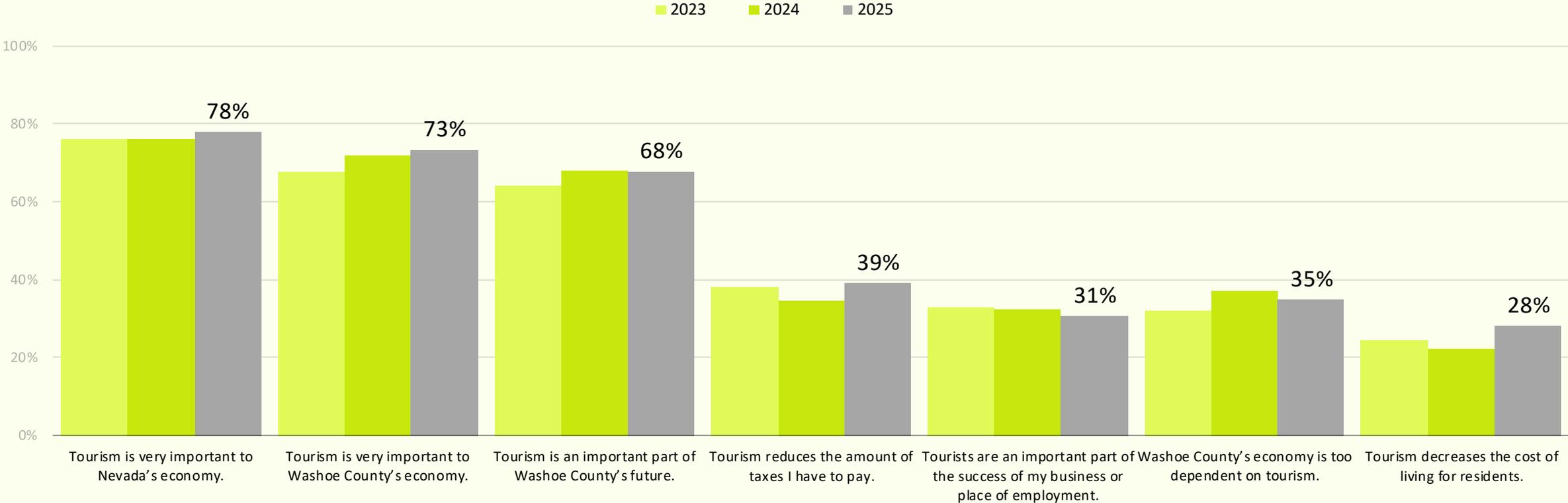
Base: 2025 Washoe County residents. 400 completed surveys.

The perception that tourism is important to the state and local economics has been strong and consistent over the years.

Around one third of residents consistently worry that Washoe County is too dependent on tourism (35% on average).

Tourism Industry Impact on Economy Over Time

(% selecting agree + strongly agree)



Question: Thinking about tourism and its impact on the economy, 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."

Base: Total Washoe County residents. 1,276 completed surveys.

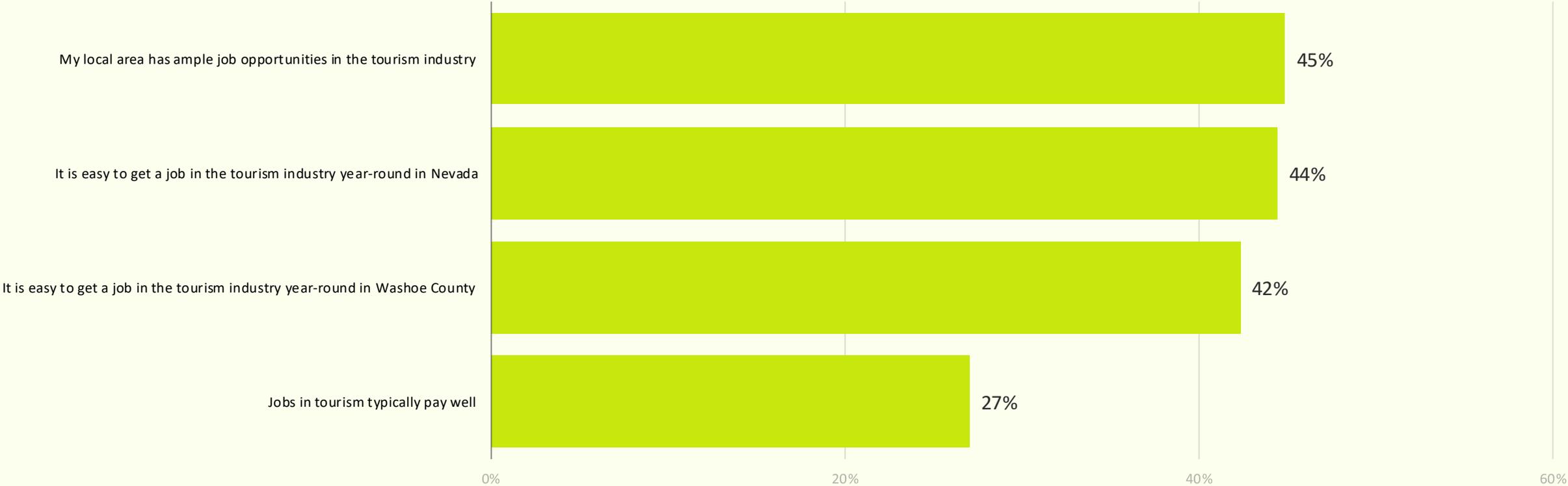
Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

Tourism is well-positioned as a meaningful workforce lever – closing the pay perception gap is the key unlock.

Nearly half of Washoe County residents agree that local tourism provides ample job opportunities (45%) and it's easy to secure a tourism job statewide (44%) and locally (42%).

Tourism Industry Impact on Jobs

(% selecting agree + strongly agree)



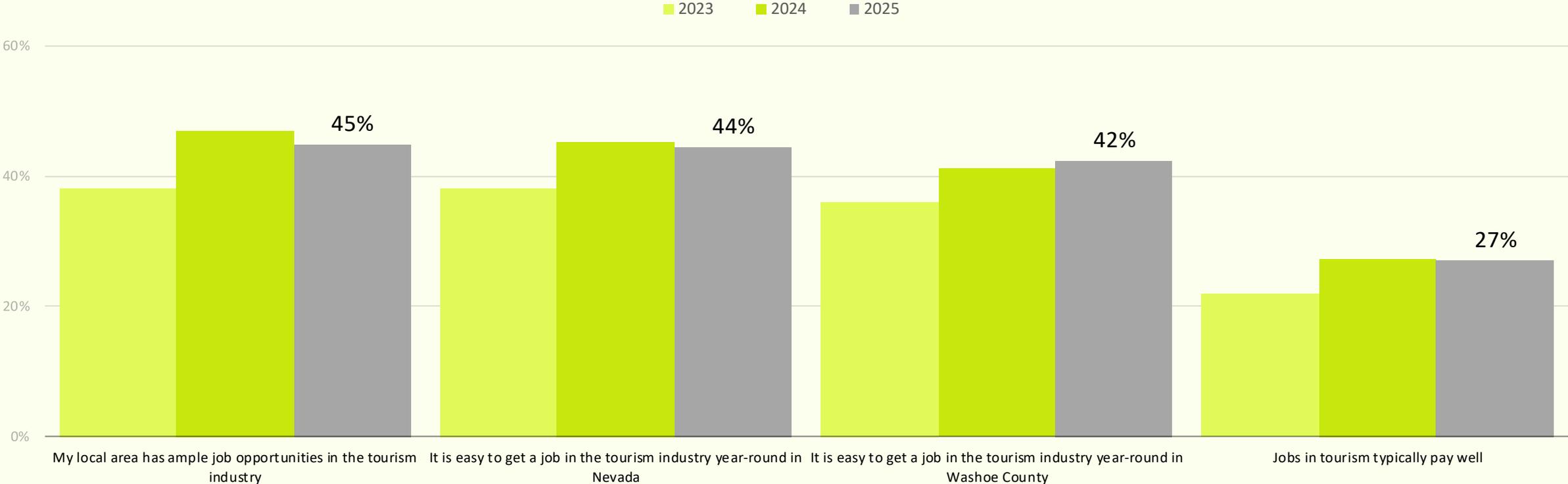
Question: Thinking about tourism and its impact on jobs, please rate how much you agree with the following statement using a five-point scale in which "1" represents "Strongly disagree" and "5" represents "Strongly agree."

Base: 2025 Washoe County residents. 400 completed surveys.

Washoe County residents confirm the stronger employment outlook they observed in 2024.

Tourism Industry Impact on Jobs Over Time

(% selecting agree + 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."

Base: Total Washoe County residents. 1,276 completed surveys.

Note: Due to methodological changes between 2023 and 2024, shifts should be considered directional.

Washoe County residents are more supportive of tourism than the average American traveler – but crowds and traffic are a bigger pain point.

Residents are more likely to recognize tourism’s economic value compared to the national sample (+20 percentage points), but they feel the day-to-day friction more acutely – especially crowds and traffic (+21pp). Concerns about broader harms (+5pp environment, +4pp safety, and +4pp culture) appear secondary by comparison. This suggests tourism is welcomed in Washoe County, but maintaining support depends on visibly managing crowding and navigability.

Tourism Industry Impact: National Benchmark

(% selecting agree + strongly agree)



Question: Thinking about tourism and its impact on your community, 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.”

Base: 2025 Washoe County residents. 400 completed surveys. June 2025 American travelers. 1,988 completed surveys.

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