

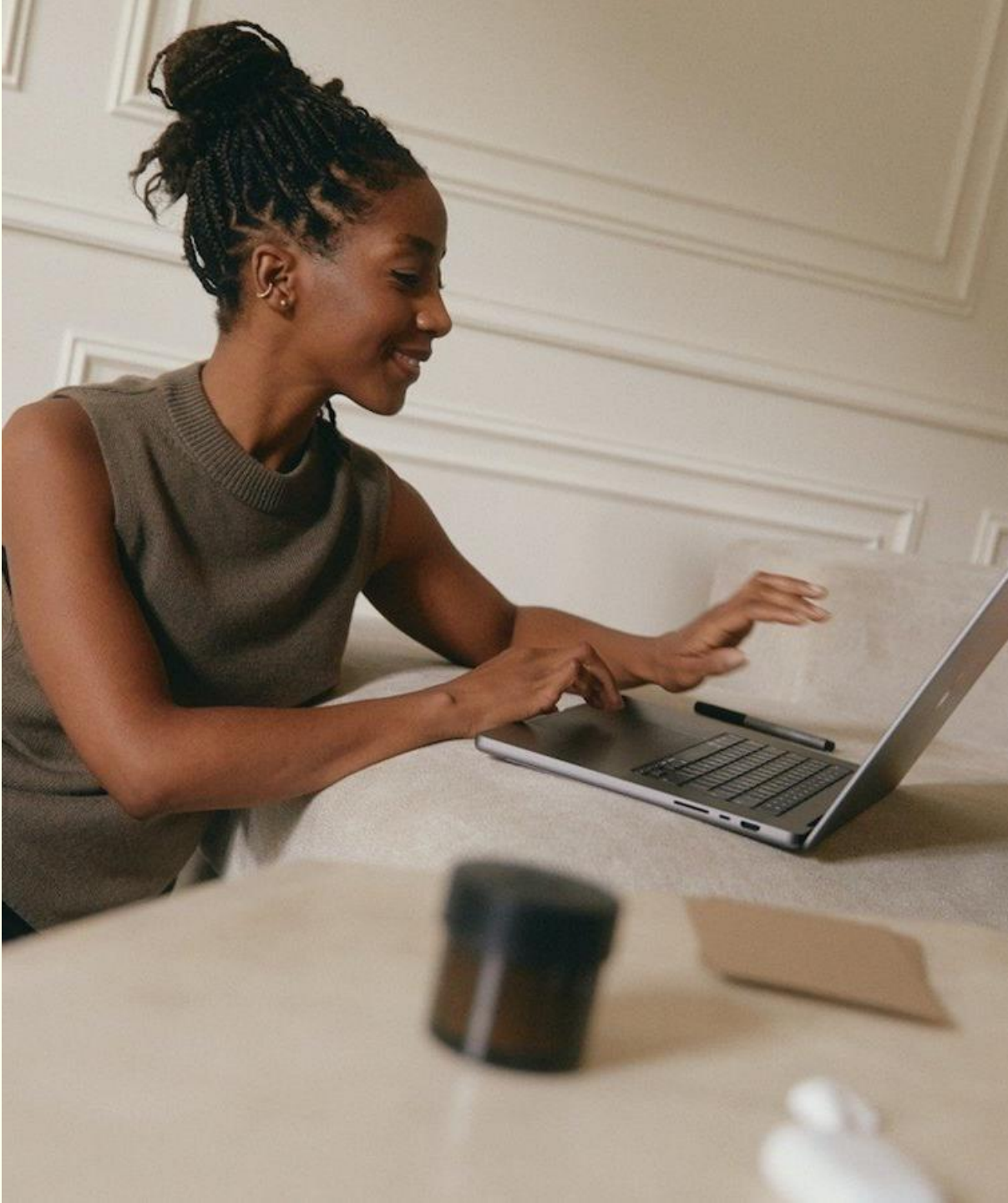
Future Partners



Reno-Sparks Convention & Visitors Authority 2024 Destination Research

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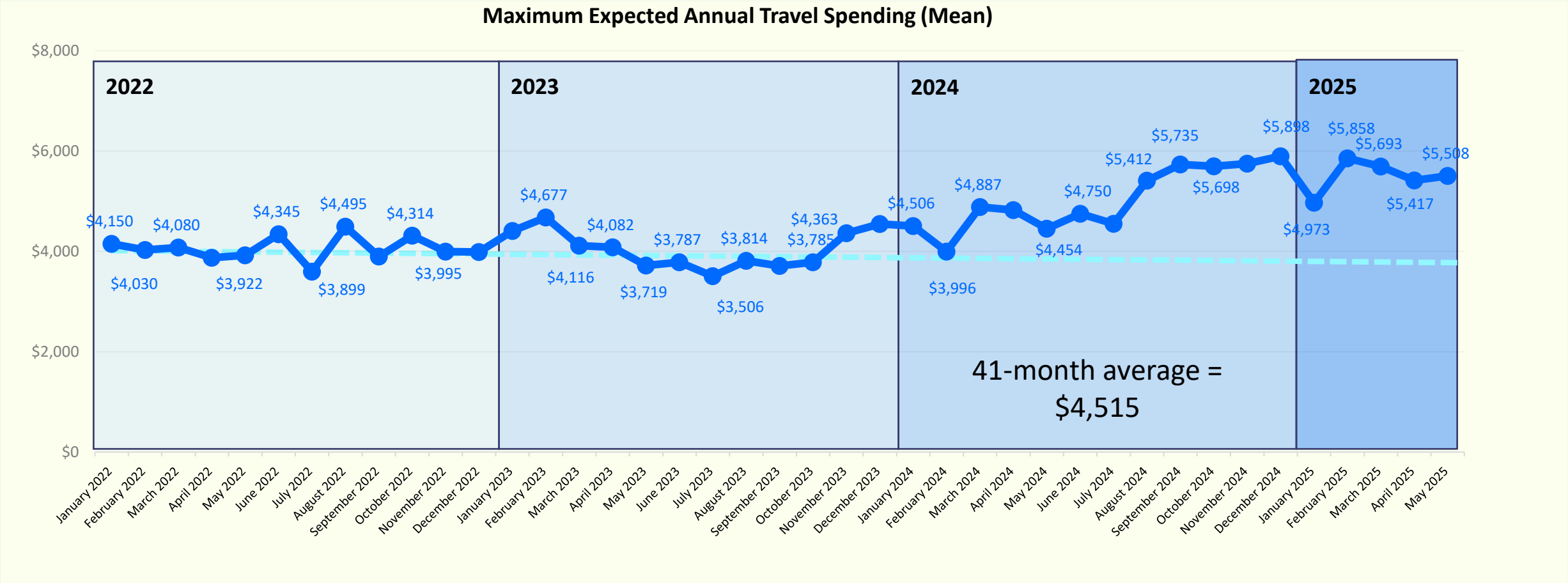




Travel Sentiment Trends

Expected travel spending has returned to 2024 levels after a dip in January 2025.

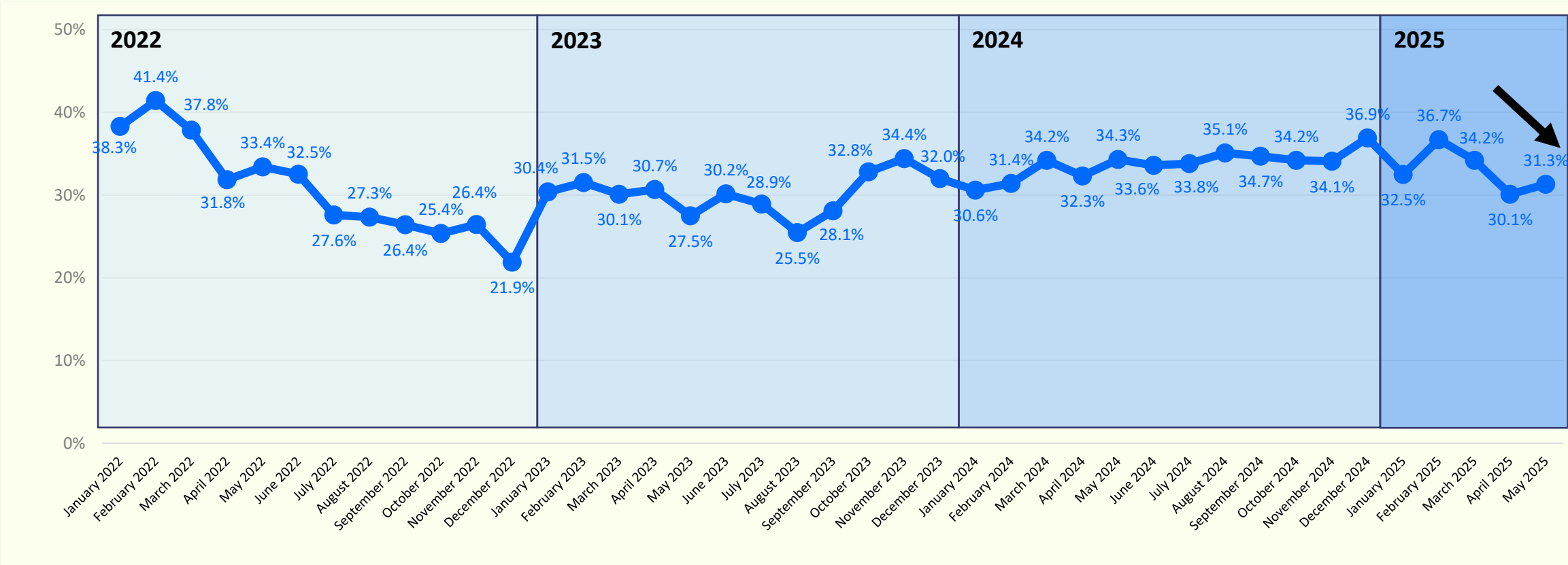
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



Confidence that now is a good time to spend on leisure travel has declined since February 2025 – though a slight uptick last month.

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?

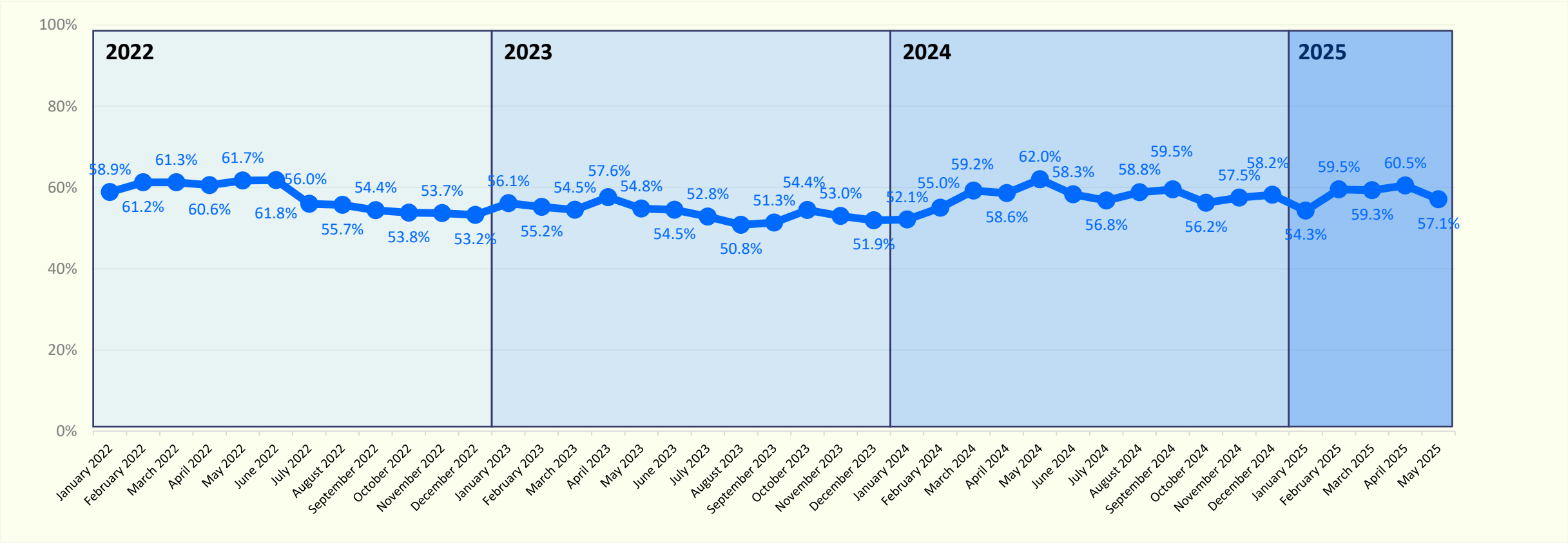
% Good time or Very good time



An increasing number of travelers report that they will make travel a budget priority in the near-term.

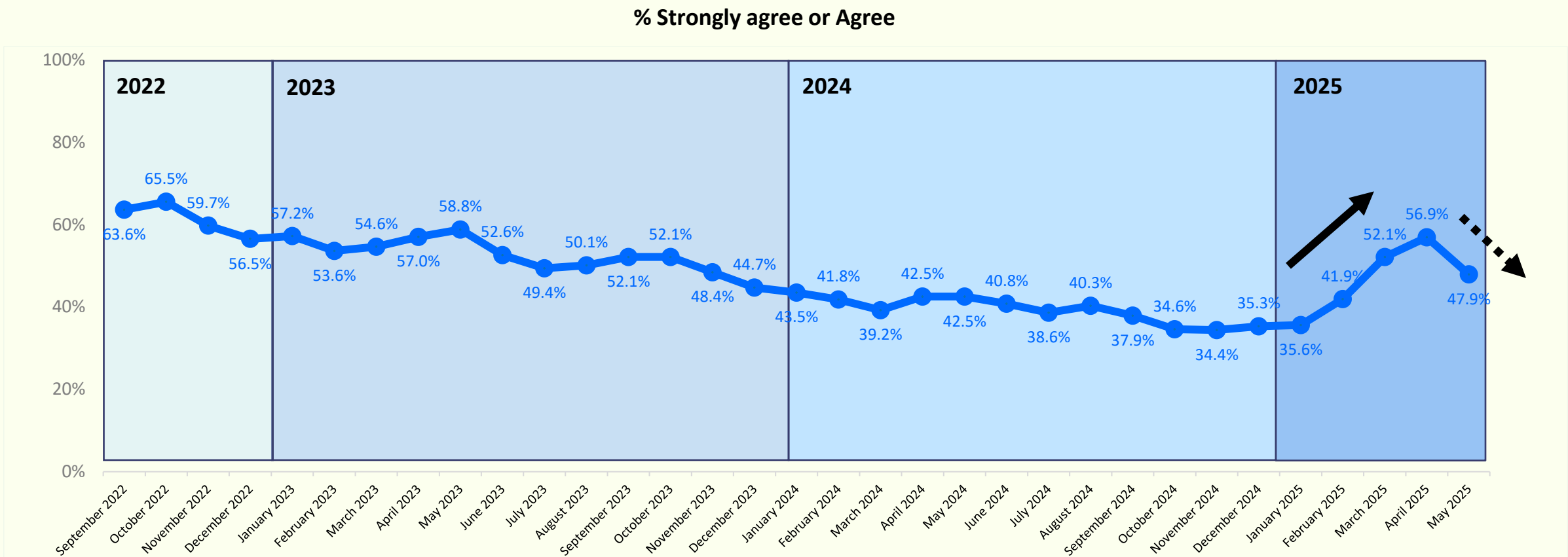
Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. Leisure travel will be a(n)...

% Extremely high priority or High priority or Somewhat high priority



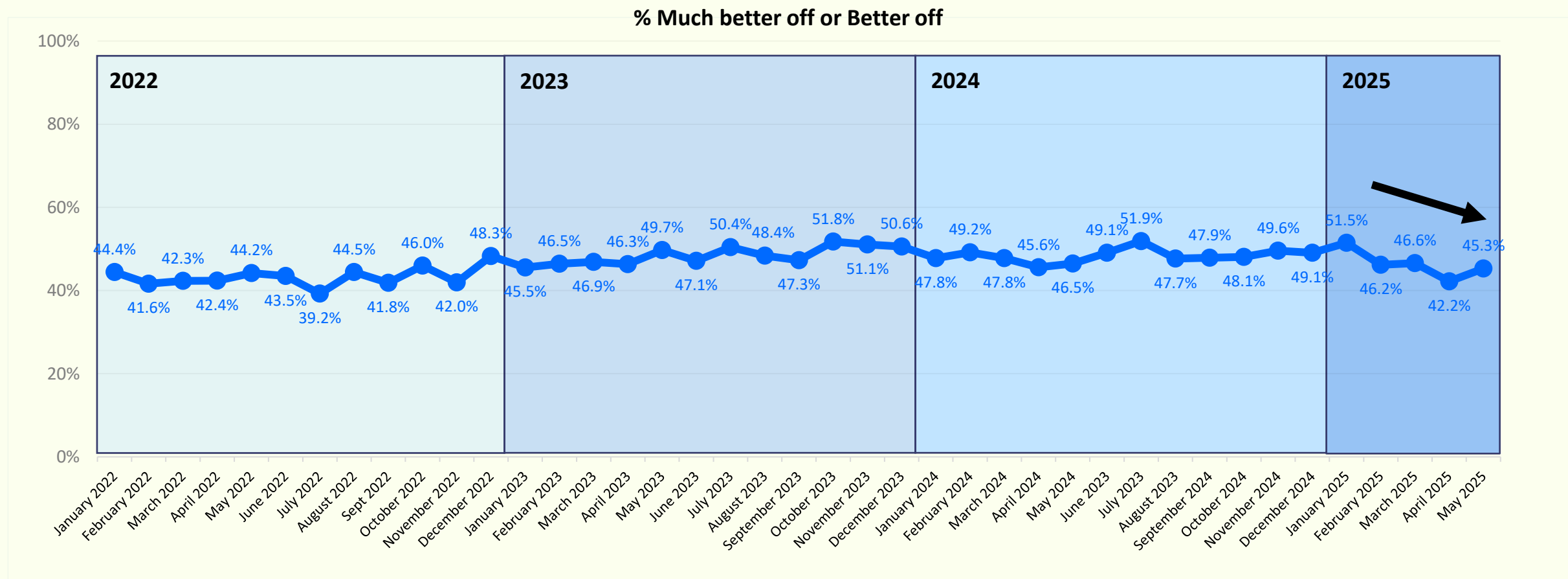
Recession fears are growing, though May 2025 indicates a possible easing of these worries.

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



Traveler confidence about their financial future has decreased over the past few months.

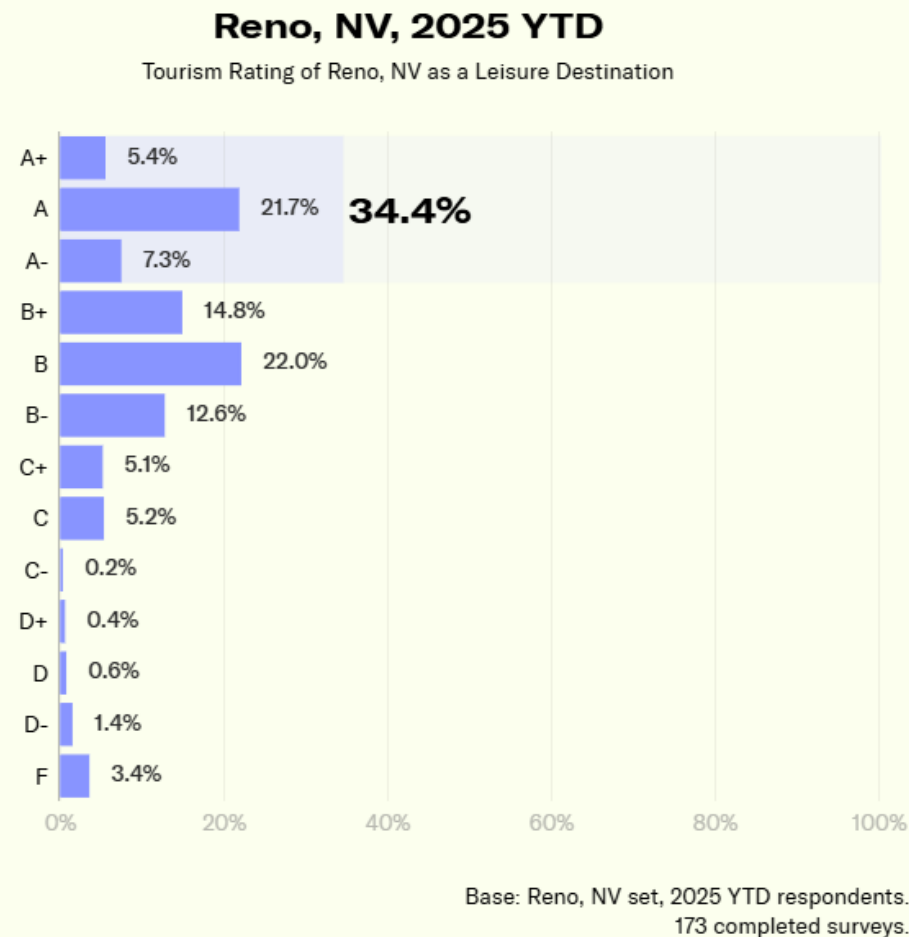
Question: LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?





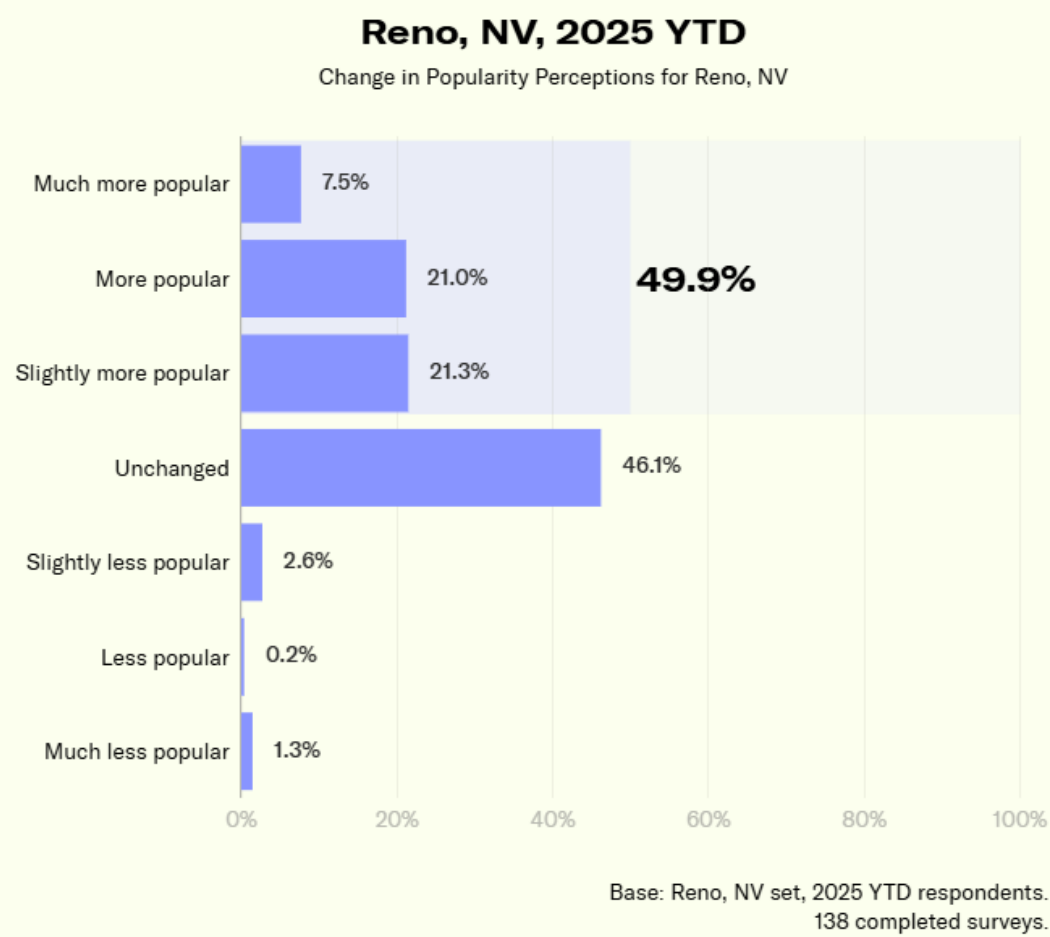
Reno Brand Health Metrics

Destination Grade



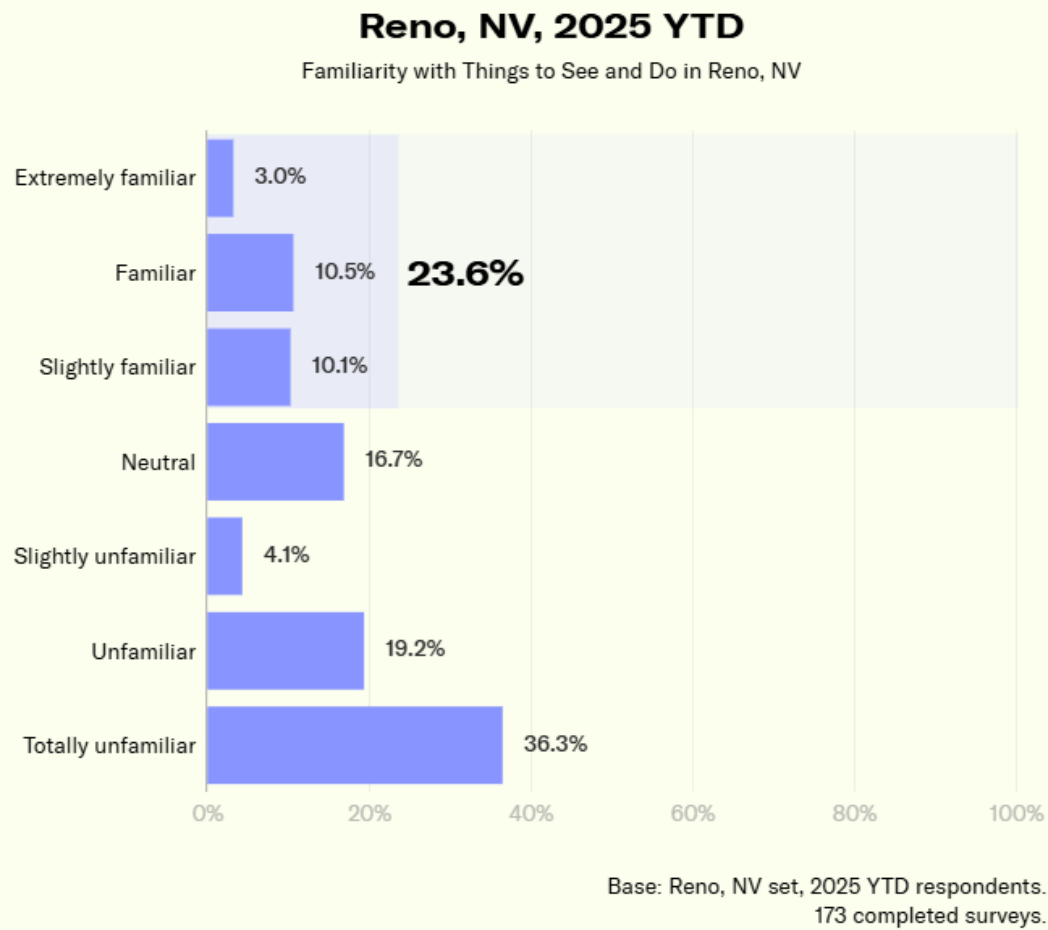
Question: Using what you already know...
If you were giving Reno, NV an OVERALL GRADE as a tourist destination, what would it be?

Change in Destination Popularity



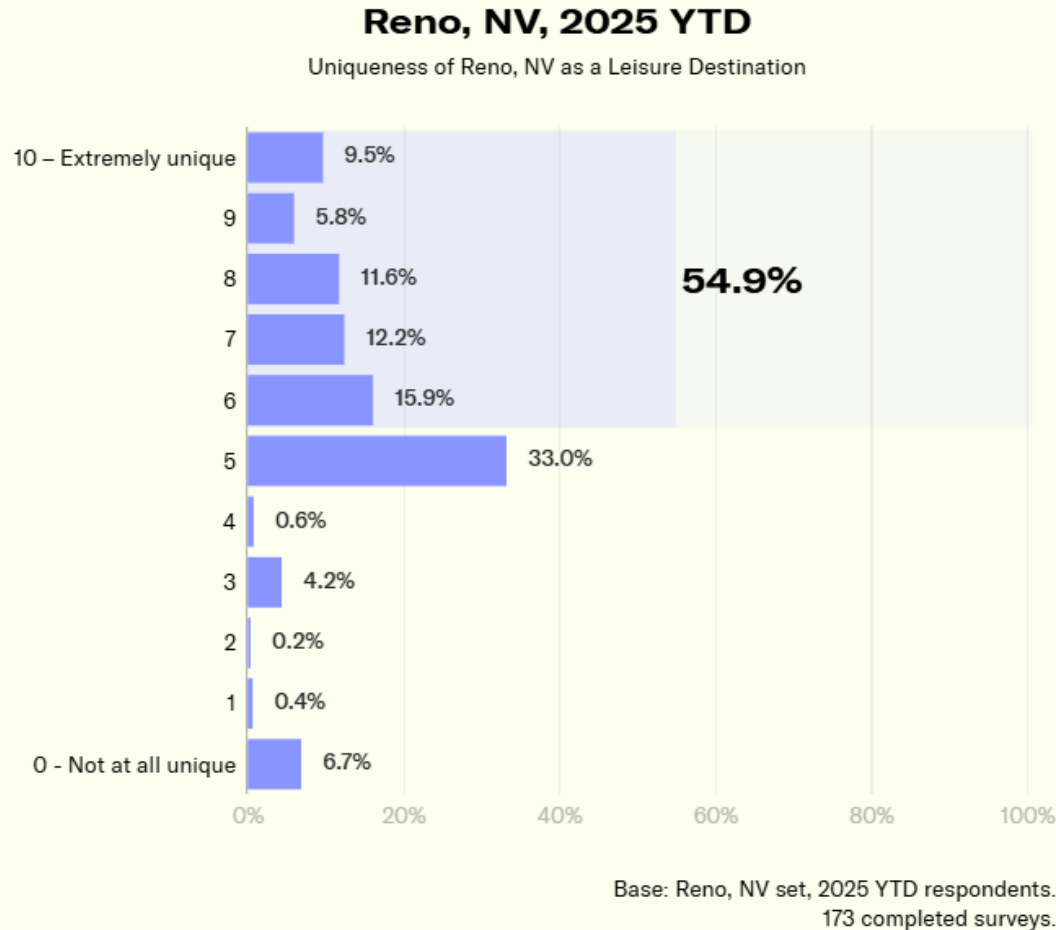
Question: In the last few years, has Reno, NV's popularity as a place to visit changed?
From what I have seen, Reno, NV is becoming _____.

Destination Familiarity



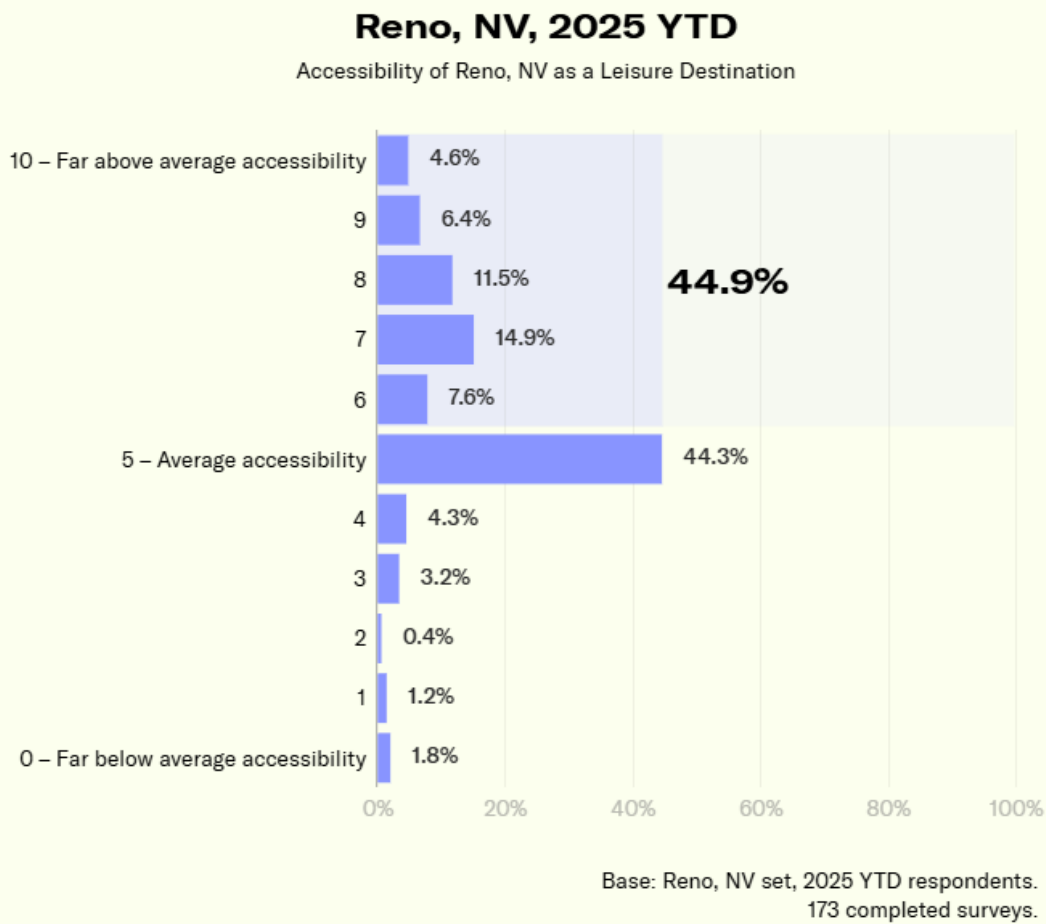
Question: How familiar are you with the things for visitors to see and do in Reno, NV?

Destination Uniqueness



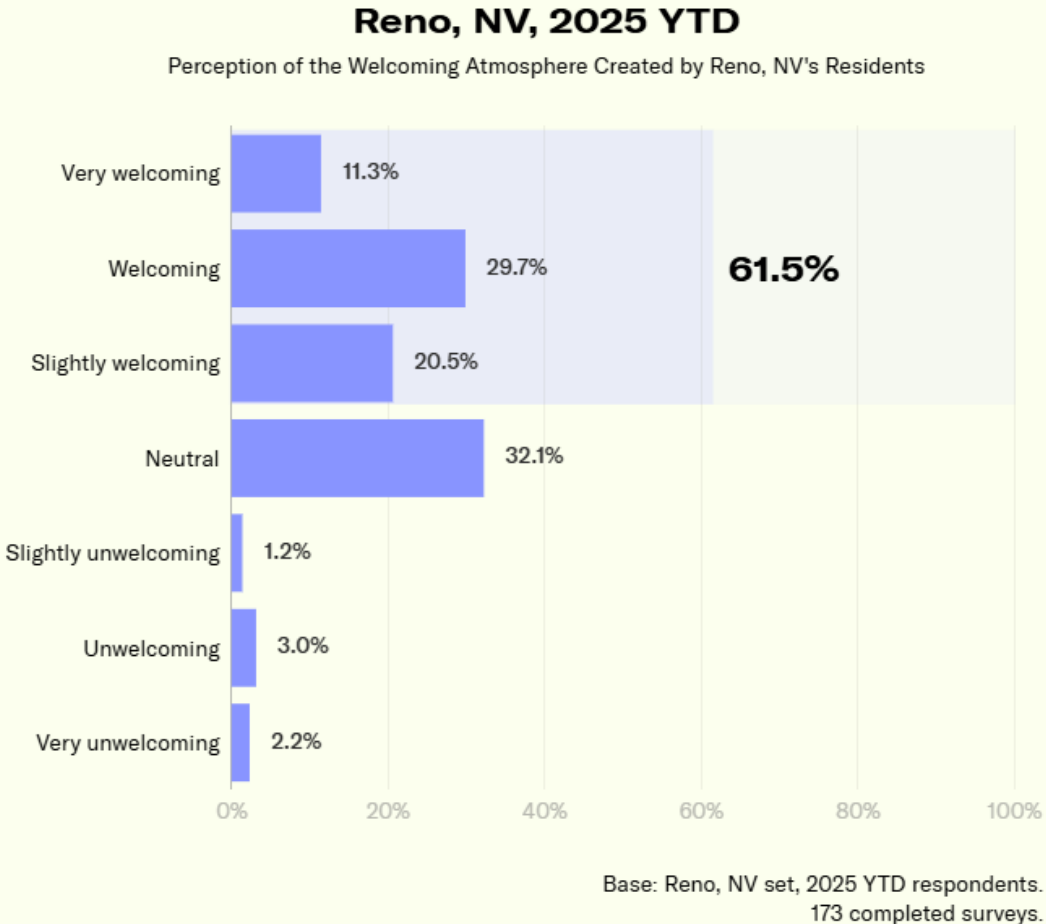
Question: Please think about the experiences a traveler can have in Reno, NV and compare that to other destinations. How unique are these experiences?

Travel Accessibility



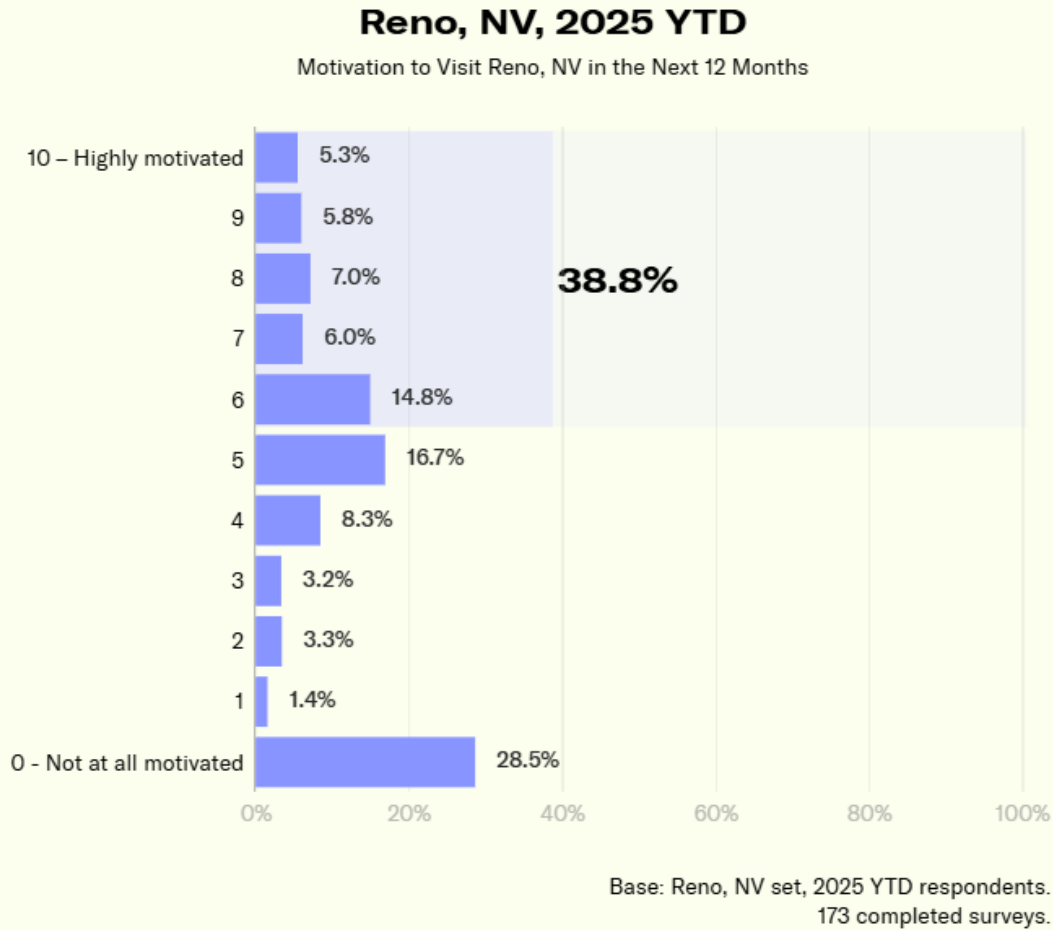
Question: Overall, how accessible do you feel the experiences in Reno, NV would be to you and the people you regularly travel with?

Welcoming Atmosphere



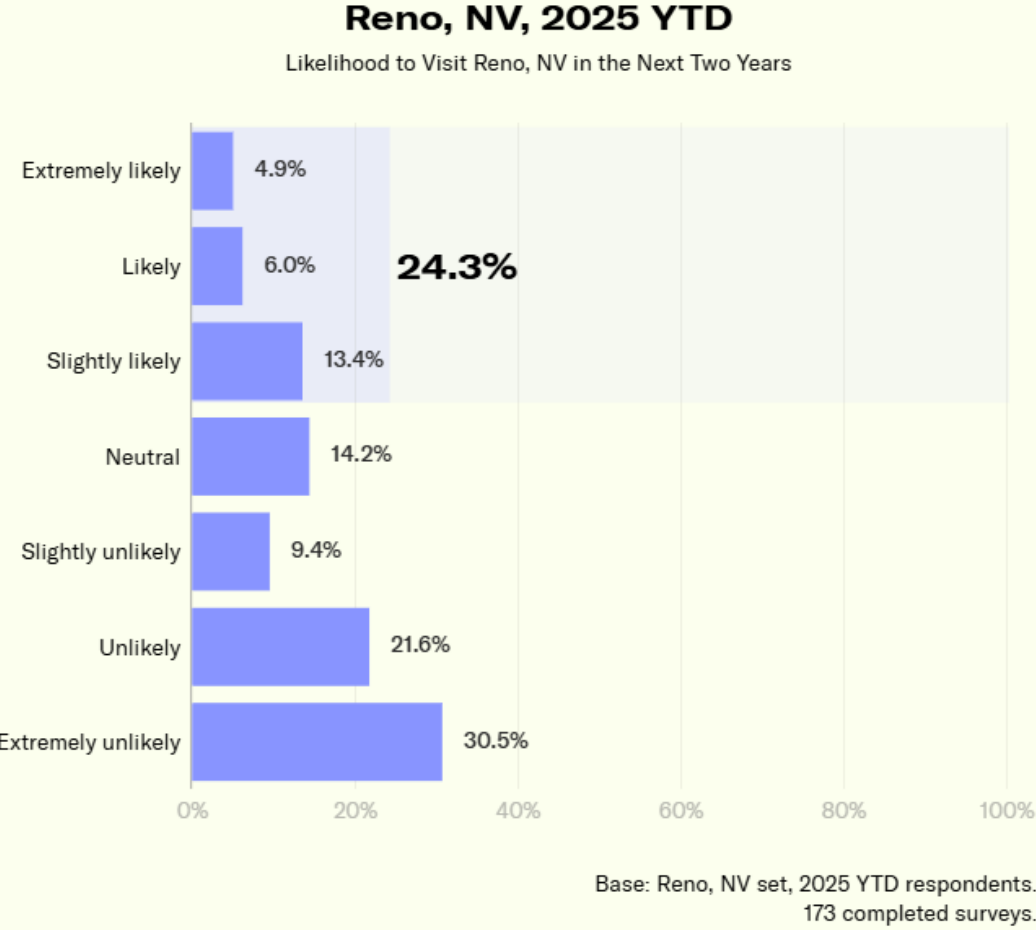
Question: Given what you know about Reno, NV, how welcoming would you expect the residents there to be to people like yourself?

Motivation to Visit



Question: How motivated are you to take a leisure trip to Reno, NV in the NEXT TWELVE (12) MONTHS?

Likelihood to Visit

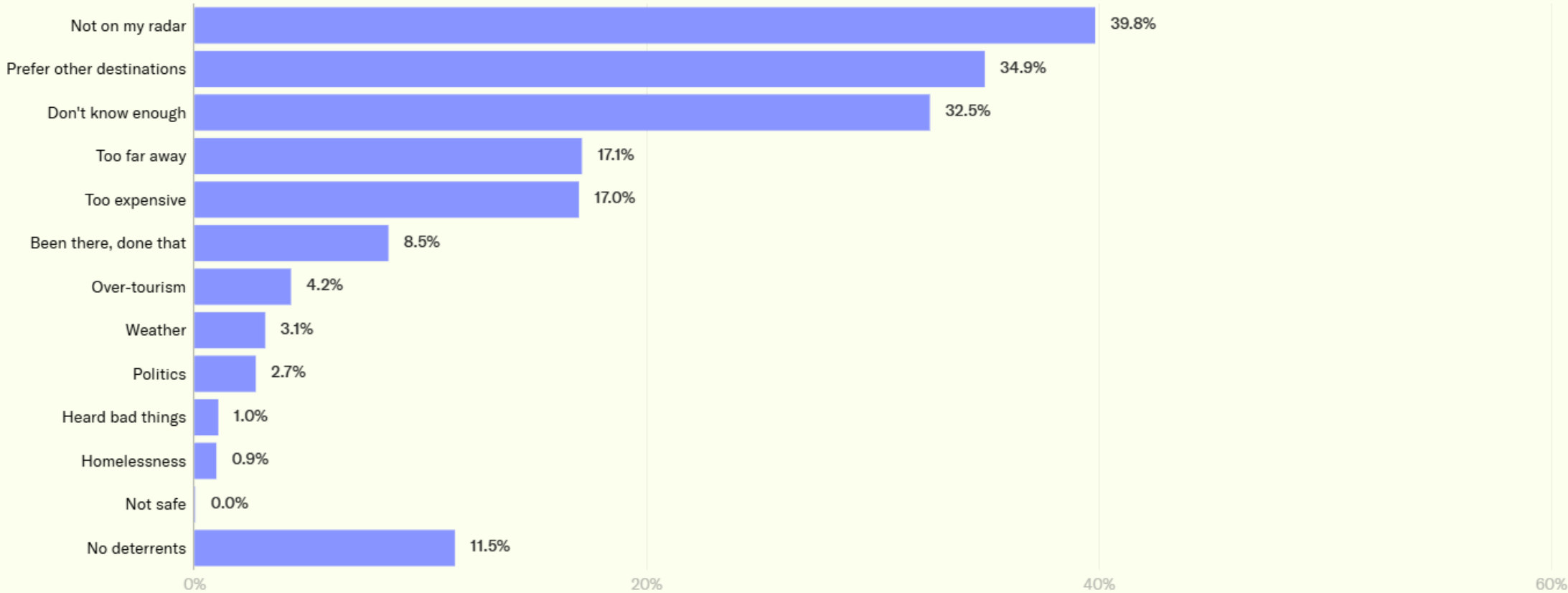


Question: How likely are you to visit Reno, NV for leisure in the NEXT TWELVE (12) MONTHS?

Destination Deterrents

Reno, NV, 2025 YTD

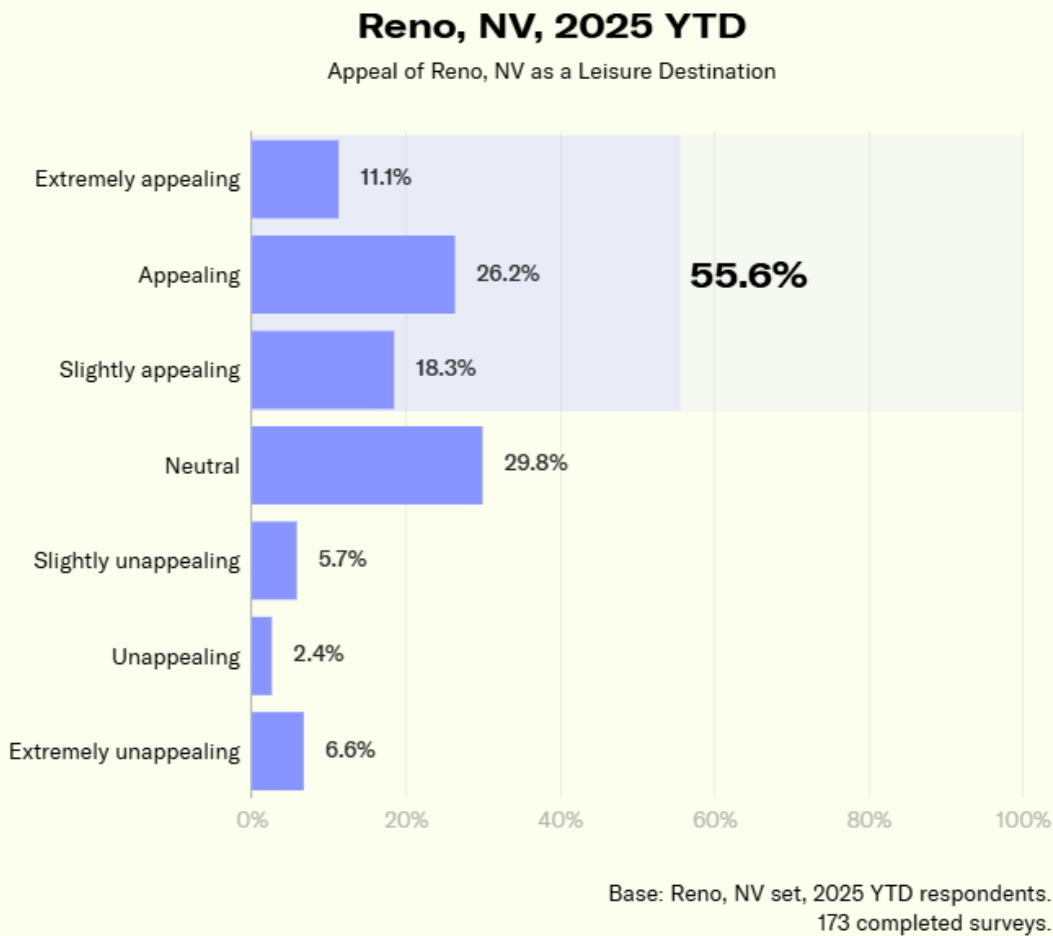
Deterrents for Traveling to Reno, NV for Respondents Unlikely To Visit in the Next Two Years



Question: Which of the following accurately describe why you said you're unlikely to visit
Reno, NV in the NEXT TWO (2) YEARS?

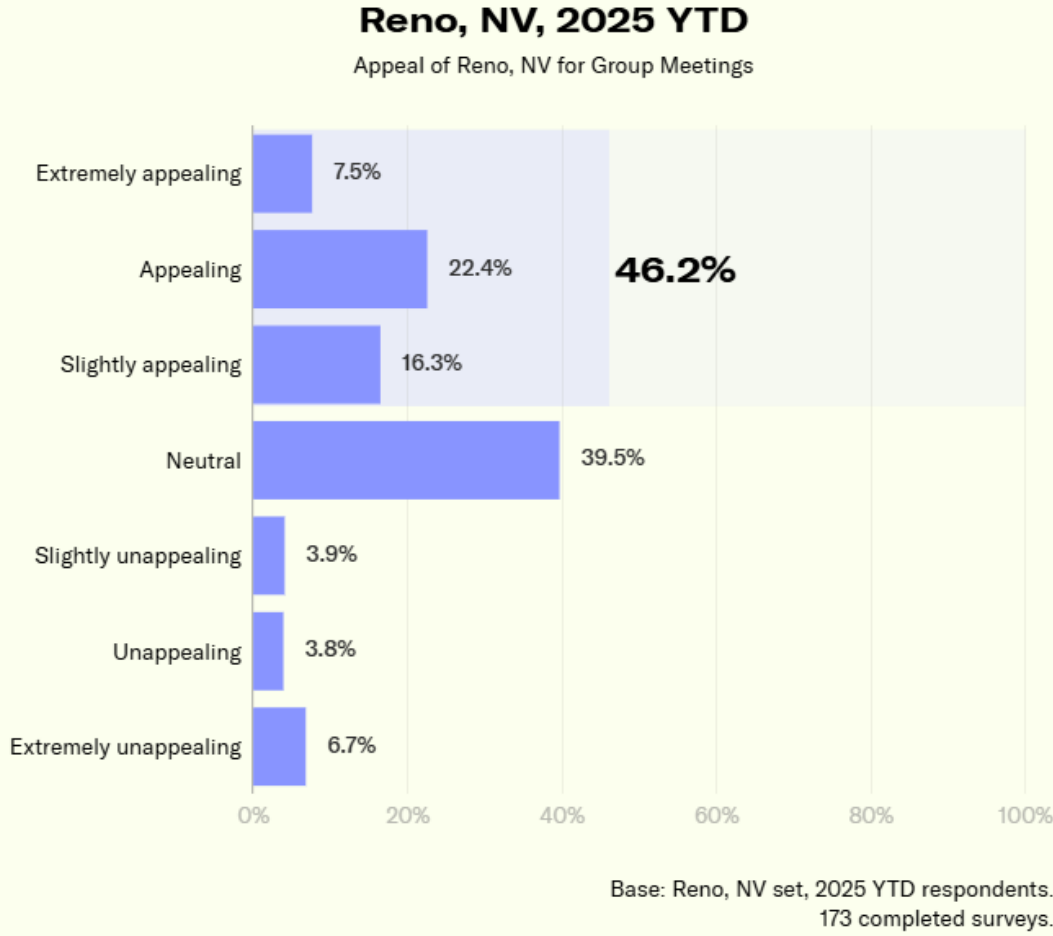
Base: Reno, NV set, 2025 YTD respondents unlikely to visit in the next two years. 111 completed surveys.

Appeal as a Place to Live



Question: Given what you currently know, how appealing is Reno, NV as A PLACE TO LIVE?

Appeal as a Meetings Destination



Question: How appealing would you find Reno, NC as a place to visit for conventions, conferences, or group meetings?



Visitor Profile

Research Overview

This report presents the findings of the Visit Reno Tahoe 2024 Destination Research Program, conducted by Future Partners on behalf of the Reno-Sparks Convention & Visitors Authority and its agency, BVK. This program is comprised on three studies, which are described in turn.

Visitor Profile

The primary objective of this research is to assess and track visitor behavior to the region.

To address this research objective, Future Partners conducted an online survey of N=600 Reno Tahoe visitors, aged 18 and older who traveled to the region in calendar year 2024.

Data was collected monthly from July – December 2024. All data presented within this report is weighted to be representative of the population of Reno Tahoe visitors using lodging type, geographic location, and generation.

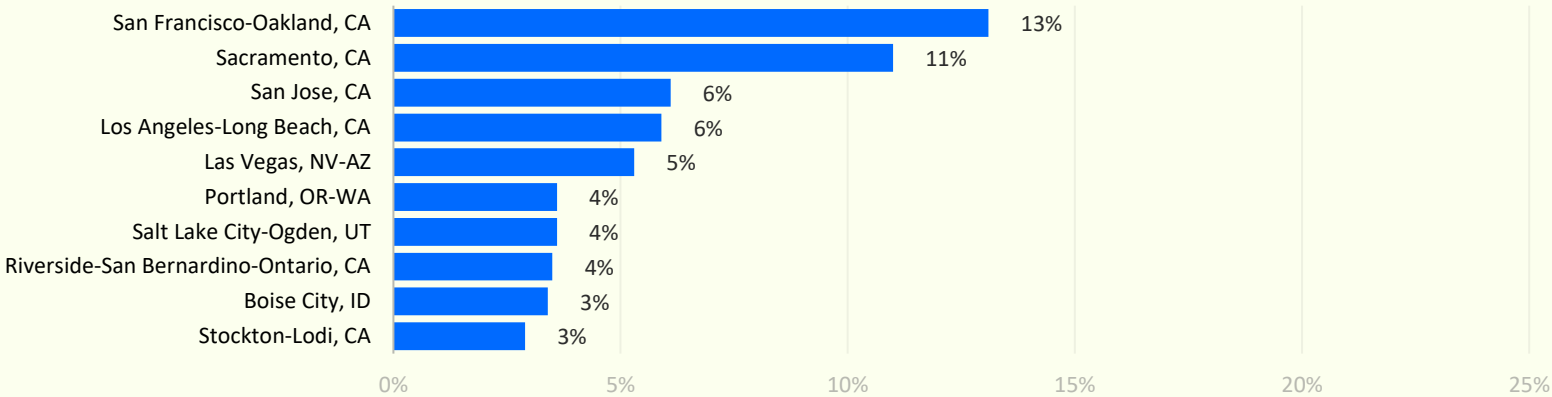


Executive Summary

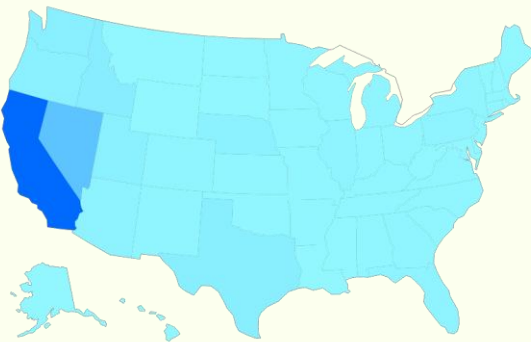
Reno Tahoe visitors predominately originated from California, with a diverse demographic profile.

Origin Markets

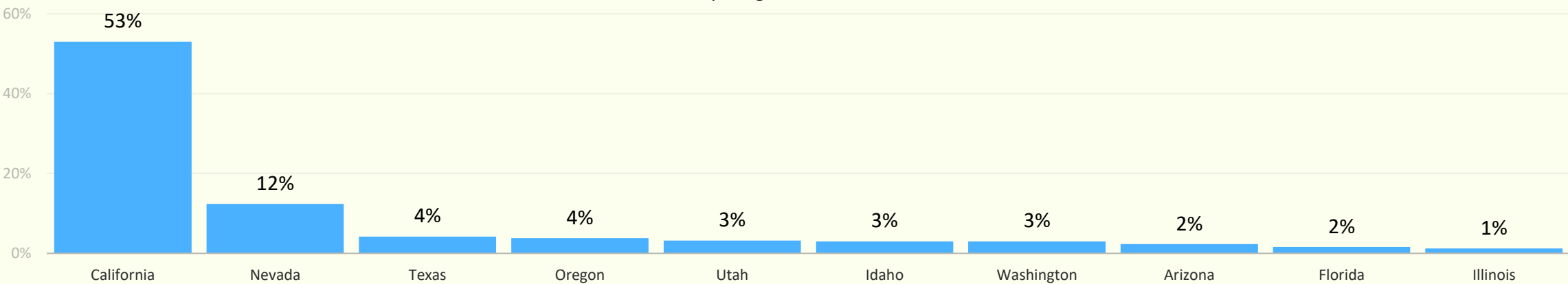
Top Origin Metros



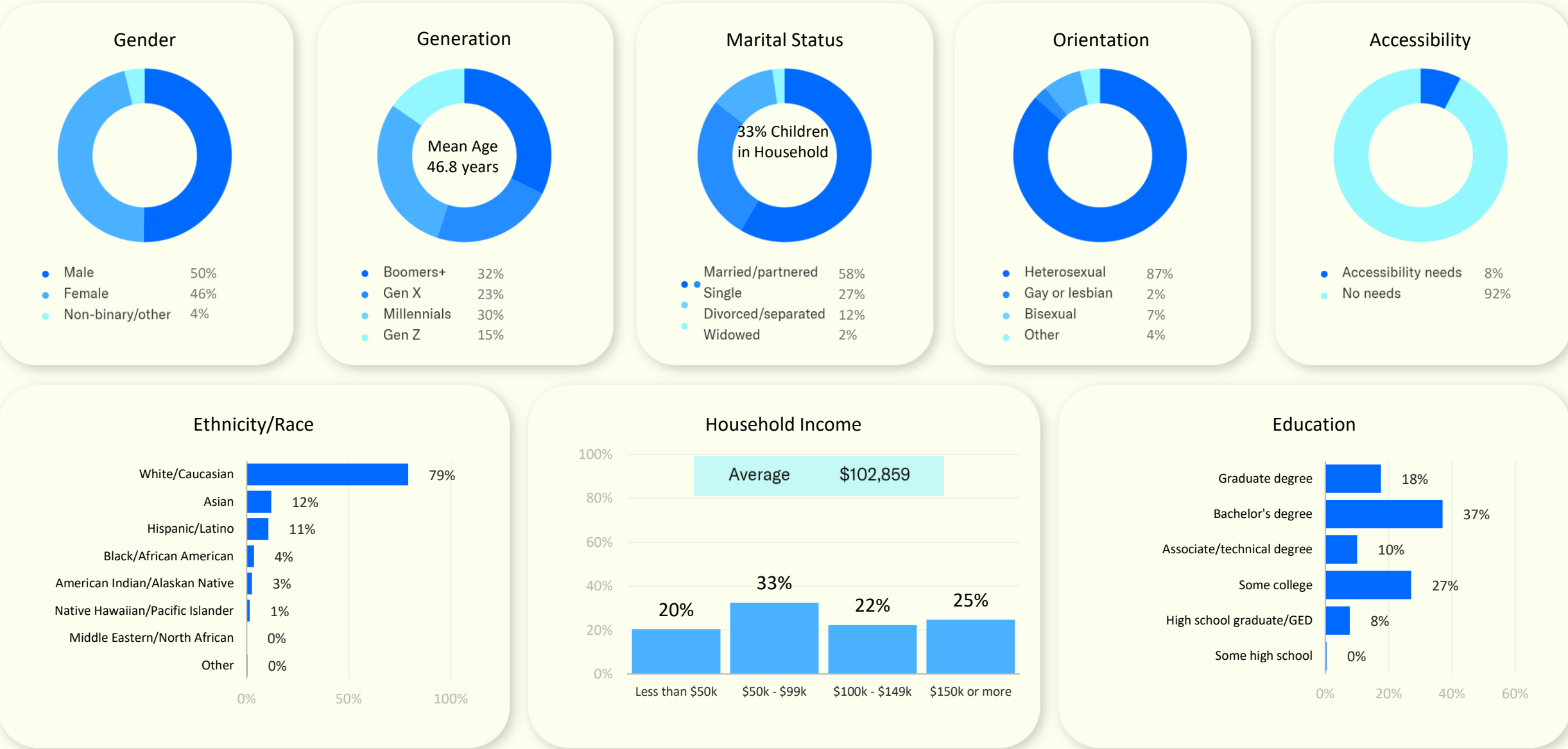
Origin Map



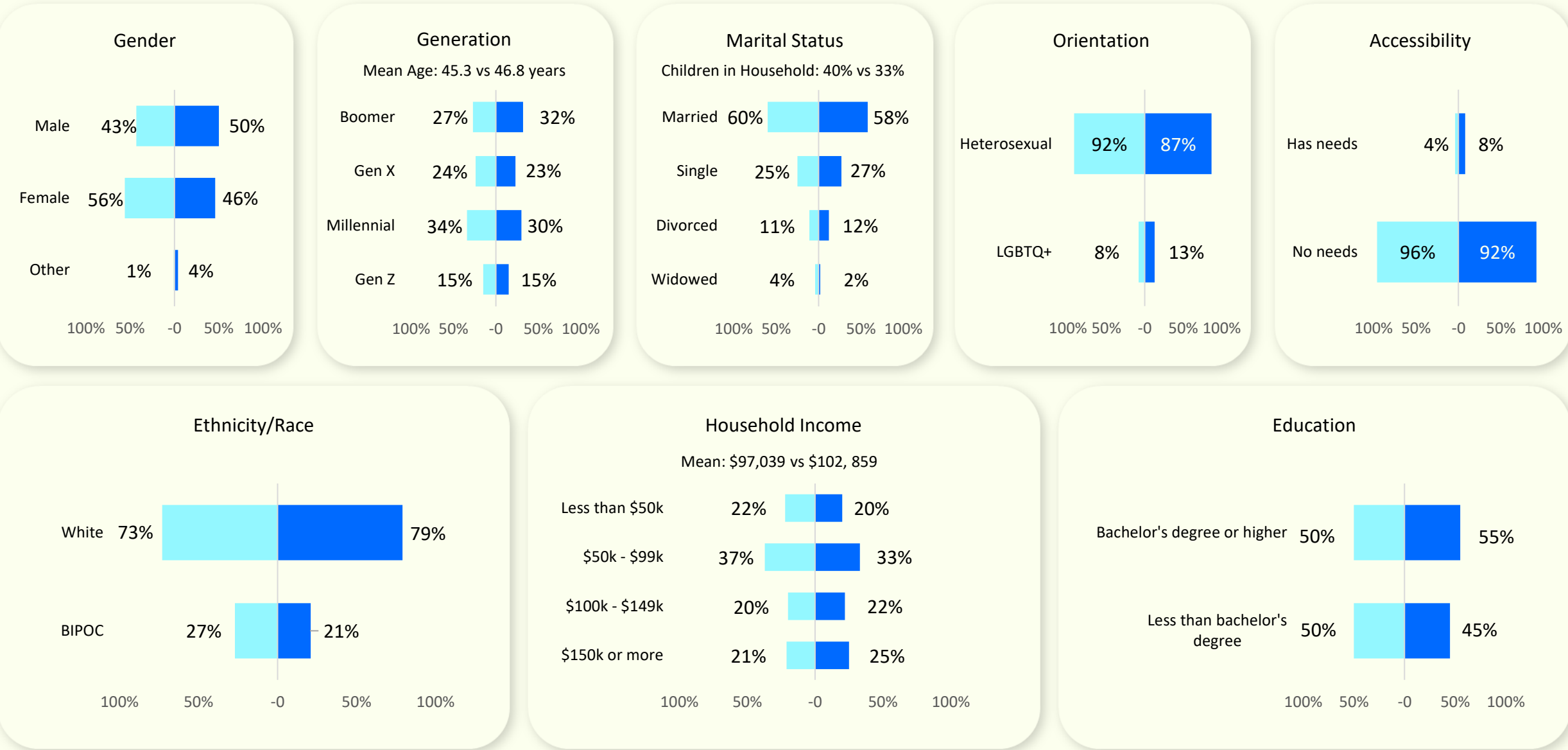
Top Origin States



Demographics



Demographics: 2023 vs 2024

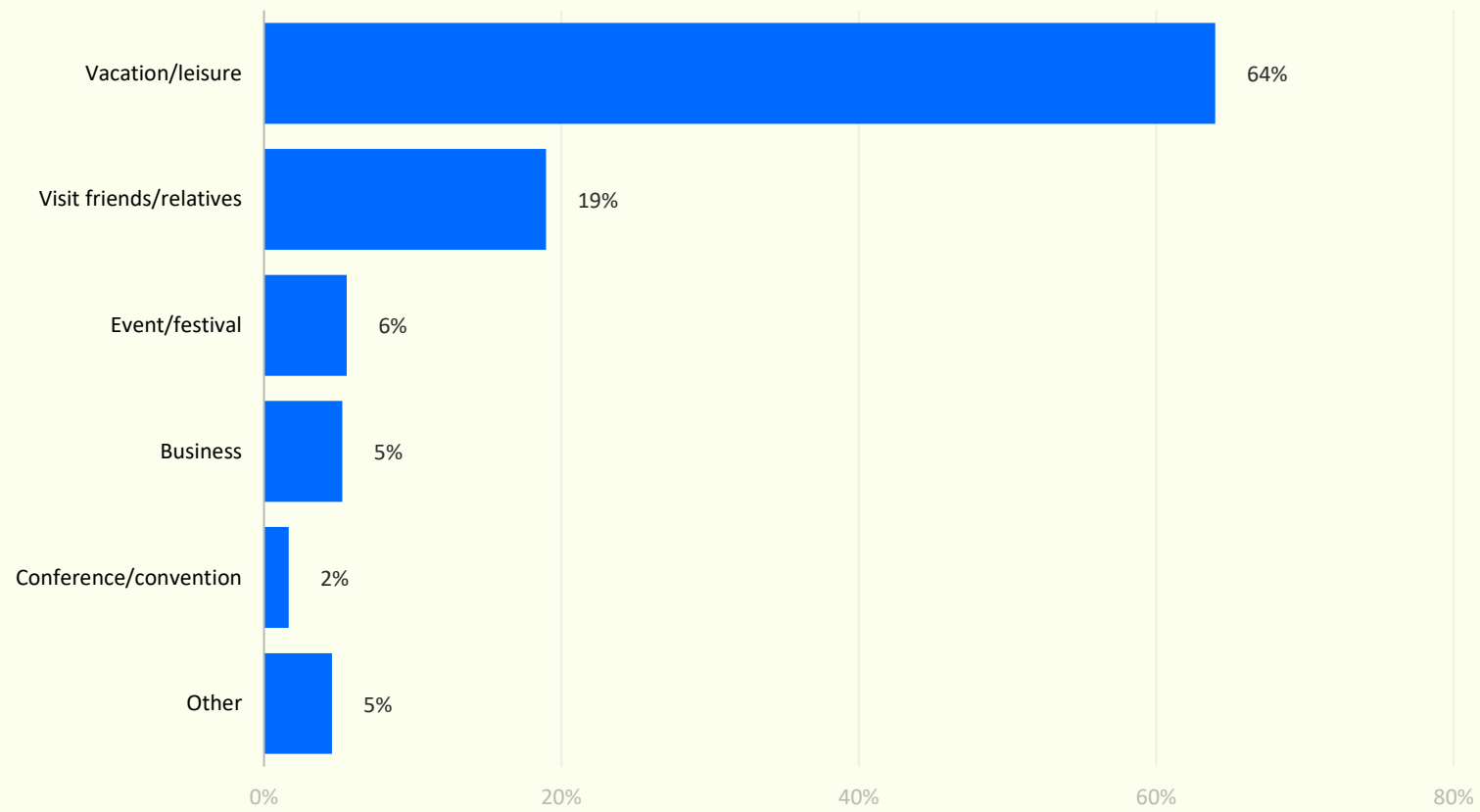


Visitors typically traveled to Reno Tahoe for leisure to enjoy the lake and to gamble.

Most visitors traveled to Reno Tahoe for vacation (64%), followed distantly by those visiting family and/or friends (19%).

A much smaller share visited the destination for a special event/festival (6%), business (6%), or a conference/convention (2%).

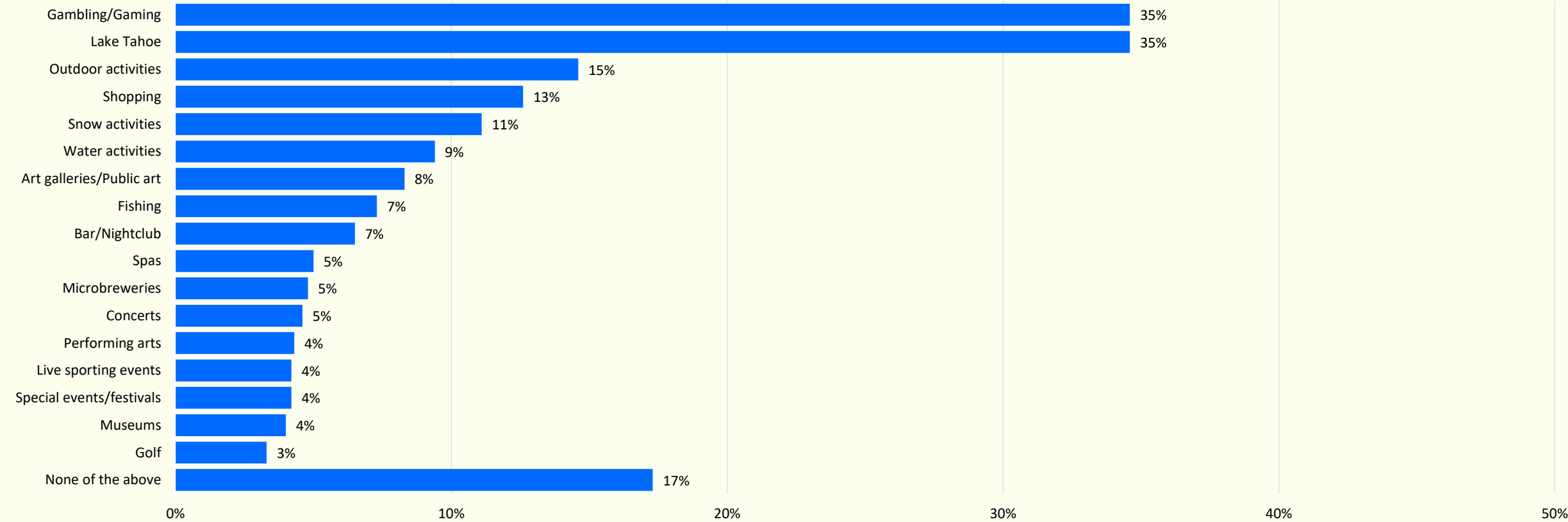
Primary Purpose of Trip



Overnight visitors were motivated to travel to Reno Tahoe to gamble (35%) and see Lake Tahoe (35%).

Outdoor activities (15%), shopping (13%), and snow activities (11%) were also motivating factors.

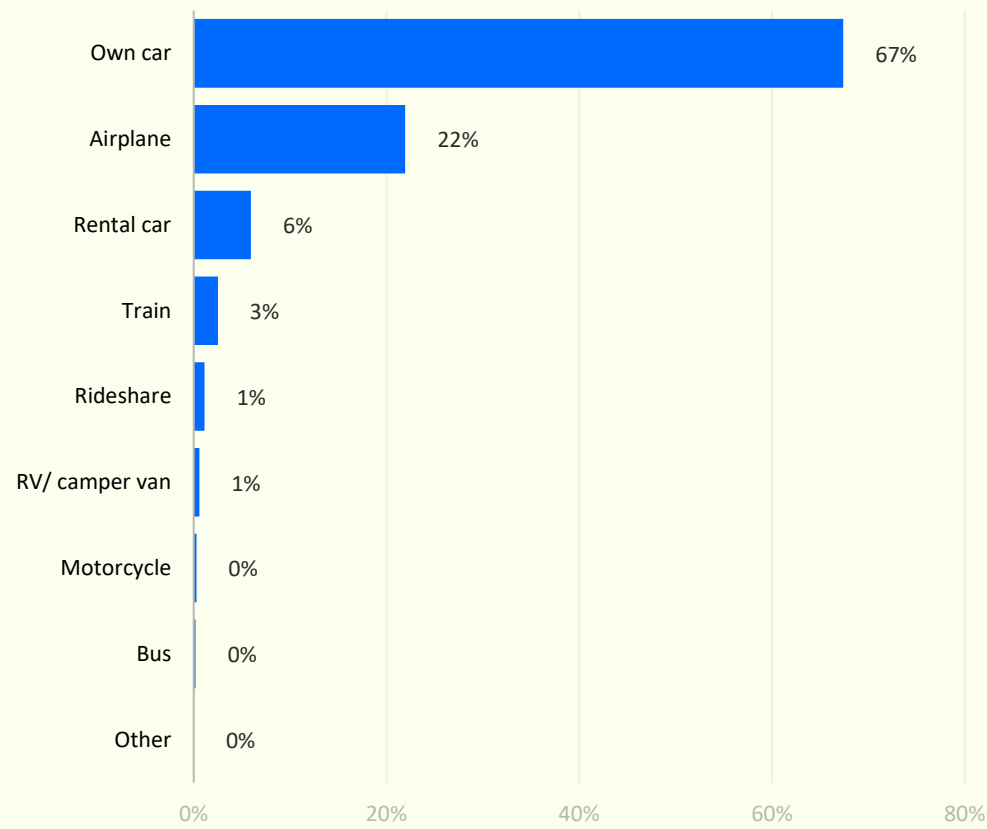
Primary Activity That Motivated Trip



Most visitors arrived in the destination using their own car (67%), though one-in-five arrived by airplane (22%).

Visitors staying in a casino hotel (59%) or non-gaming hotel (47%) were more inclined to drive their own car, while those opting for a vacation rental were more likely to fly into the area (43%).

Arrival Transportation



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental
Own car	67%	59%	47%	38%
Airplane	22%	28%	37%	43%
Rental car	6%	8%	7%	10%
Train	3%	3%	6%	6%
Rideshare	1%	0%	0%	0%
RV/ camper van	1%	0%	1%	3%
Motorcycle	0%	1%	1%	0%
Bus	0%	0%	1%	0%
Other	0%	0%	0%	0%
Base	524	208	197	157

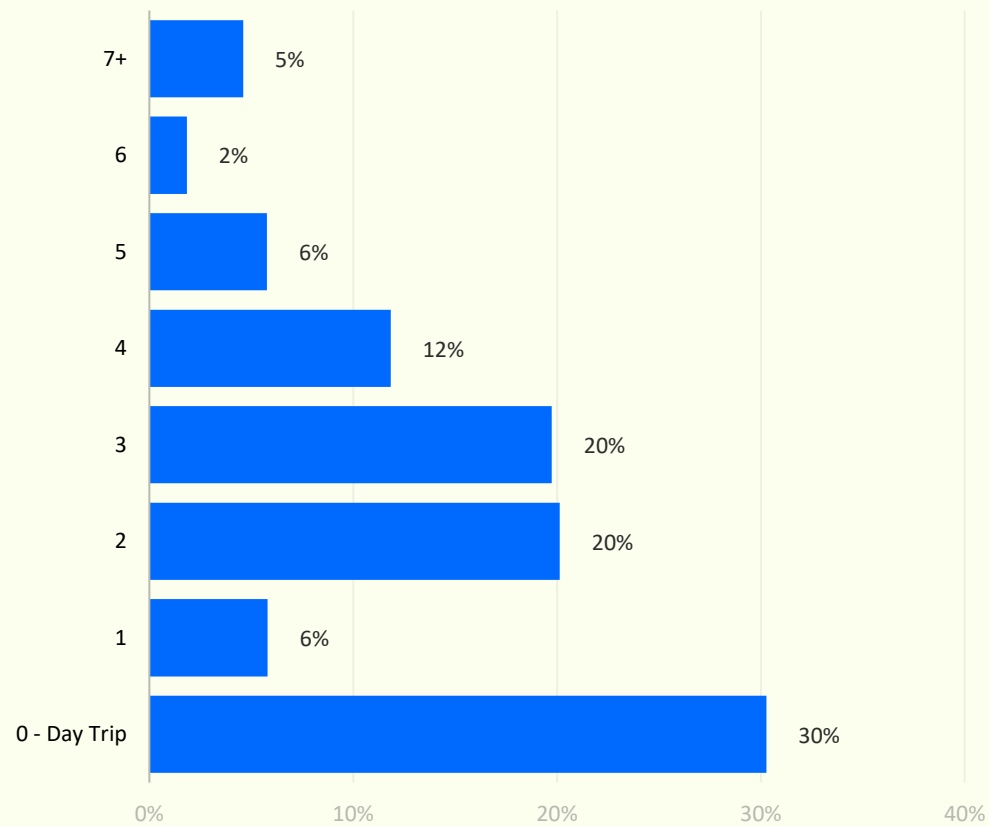
Question: On your last trip, what type of transportation did you use to arrive to the Reno Tahoe region?

Base: 2024 visitors. 524 completed surveys.

Overnight visitors stayed, on average, 3.2 nights in market.

Among visitors who stayed overnight, vacation rental guests tended to stay the longest, averaging 3.7 nights in the area.

Trip Length in Nights



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental
7+	5%	8%	6%	9%
6	2%	3%	1%	5%
5	6%	10%	8%	9%
4	12%	19%	19%	19%
3	20%	25%	31%	35%
2	20%	25%	29%	21%
1	6%	10%	6%	0%
0 - Day Trip	30%	0%	0%	0%
Mean (Nights)	2.3	3.3	3.2	3.7
Base	567	232	199	157

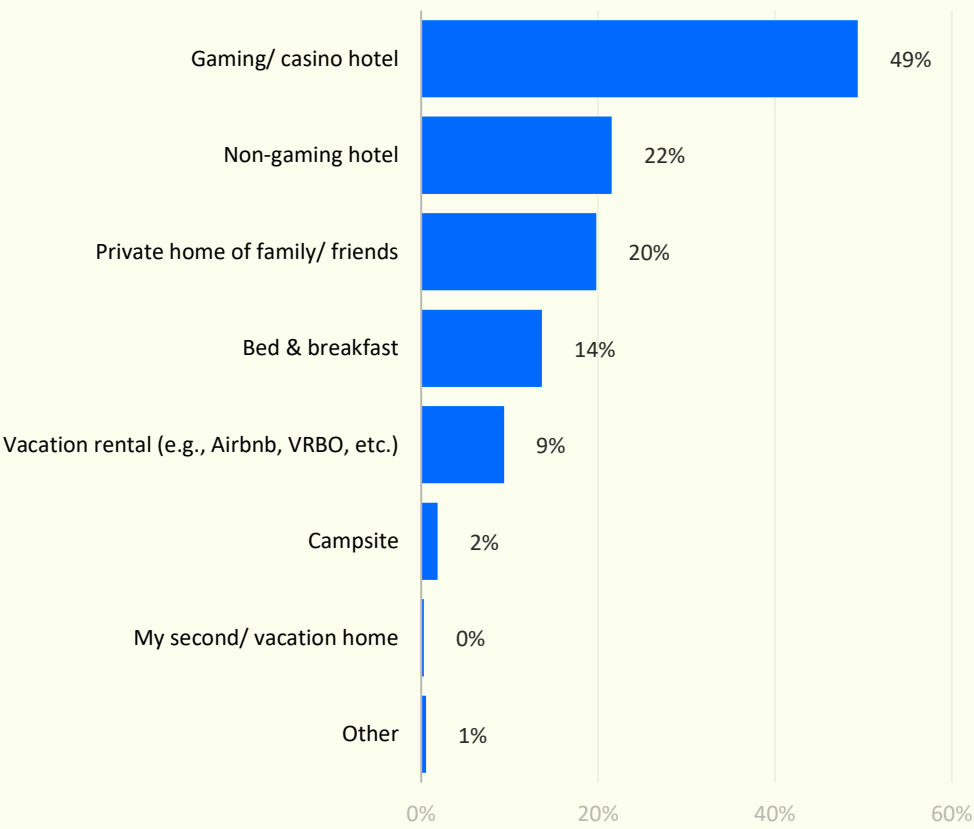
Question: How many nights did you stay in Reno Tahoe on your last trip?

Base: 2024 visitors. 567 completed surveys.

Most overnight visitors stayed in a casino hotel (49%), and more so among Baby Boomers.

One-in-five visitors stayed either in a non-gaming hotel (22%) or private home (20%). Boomers were less inclined to stay in a non-gaming casino (15%) compared to other generational groups (31% Gen Z, 22% Millennials, 24% Gen X).

Accommodation Type



Detail by Generation

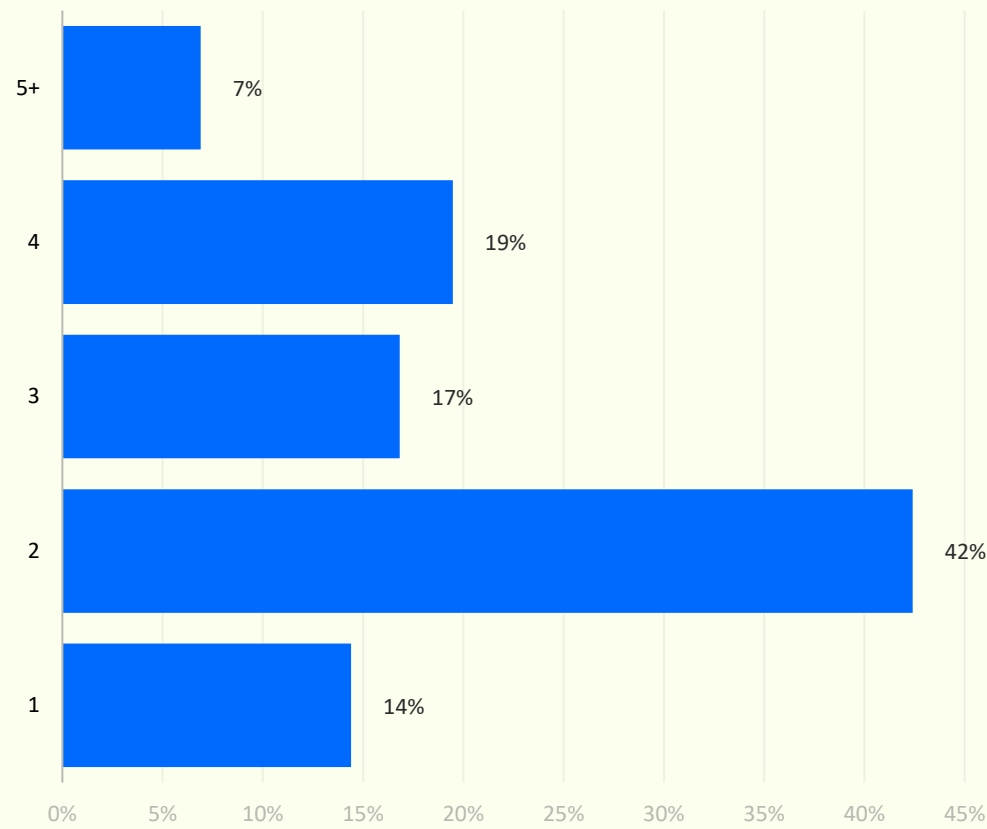
	Total	Gen Z	Millennials	Gen X	Boomers+
Gaming/ casino hotel	49%	42%	42%	51%	60%
Non-gaming hotel	22%	31%	22%	24%	15%
Private home of family/ friends	20%	9%	19%	22%	24%
Bed & breakfast	14%	22%	21%	13%	3%
Vacation rental (e.g., Airbnb, VRBO, etc.)	9%	16%	14%	8%	2%
Campsite	2%	4%	3%	1%	1%
My second/ vacation home	0%	0%	0%	0%	0%
Other	1%	1%	0%	0%	1%
Base	578	43	231	176	128

Question: What type of lodging did you use on your last trip to Reno Tahoe? Select all that apply.
Base: 2024 visitors. 578 completed surveys.

Visitors most commonly traveled with a companion (42%), with an average travel party size of 2.6 persons.

Visitors who stayed in a vacation rental typically traveled with larger parties, averaging 3.3 persons per party.

Travel Party Size



Detail by Lodging Type

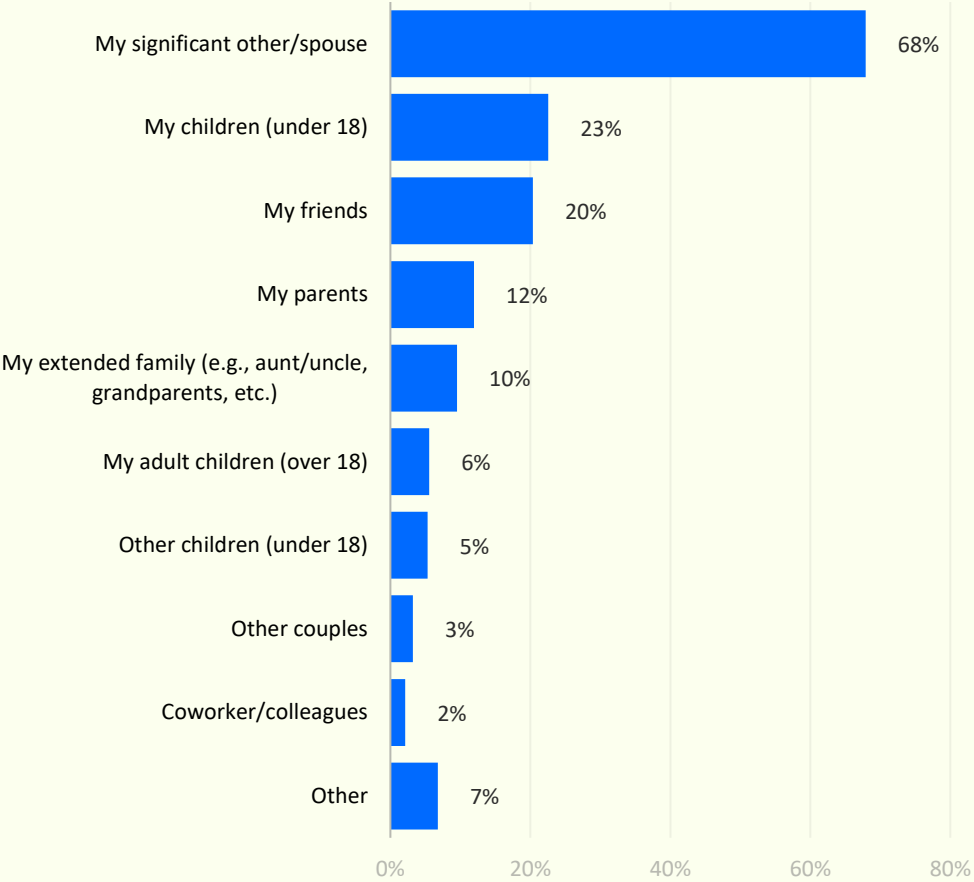
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental
5+	7%	6%	8%	16%
4	19%	21%	16%	26%
3	17%	14%	27%	27%
2	42%	47%	38%	27%
1	14%	11%	11%	4%
Mean	2.6	2.7	2.8	3.3
Base	560	227	198	154

Question: Including yourself, how many people were in your immediate travel party on your last trip to Reno Tahoe?
Base: 2024 visitors. 560 completed surveys.

A quarter of visitors traveled to the area with children under the age of 18 (23%).

Visitors staying in a vacation rental (34%) were more inclined to travel with their children compared to those staying in a non-gaming hotel (29%) or casino hotel (24%).

Travel Party Composition



Detail by Lodging Type

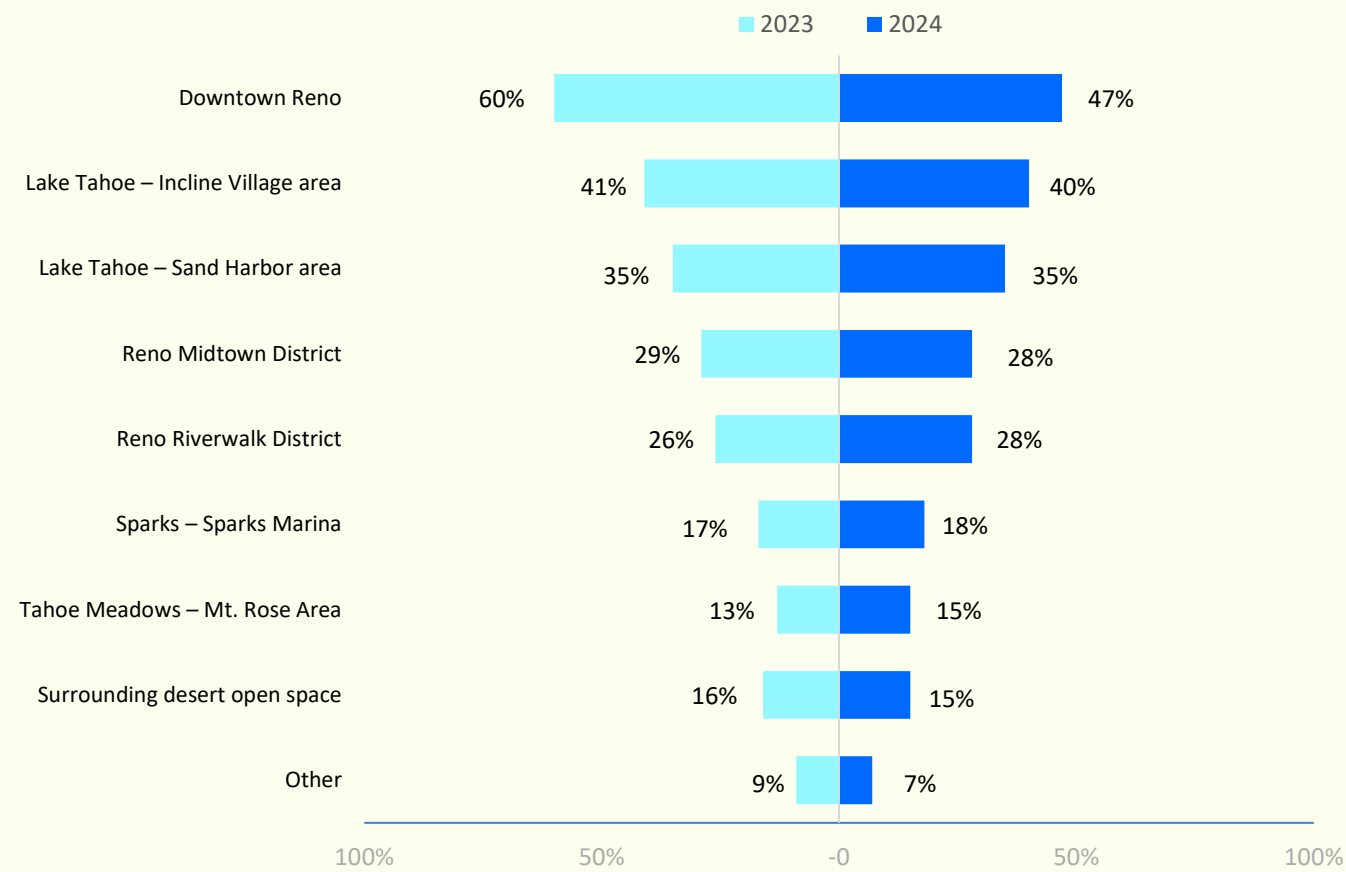
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental
My significant other/spouse	68%	67%	68%	70%
My children (under 18)	23%	24%	29%	34%
My friends	20%	22%	27%	29%
My parents	12%	9%	9%	18%
My extended family (e.g., aunt/uncle, grandparents, etc.)	10%	9%	4%	2%
My adult children (over 18)	6%	5%	5%	5%
Other children (under 18)	5%	3%	1%	2%
Other couples	3%	4%	1%	4%
Coworker/colleagues	2%	3%	6%	2%
Other	7%	1%	2%	3%
Base	524	208	197	157

Question: Who did you travel with on your last visit to the Reno Tahoe region? Select all that apply.
Base: 2024 visitors. 524 completed surveys.

Most visitors went to Downtown Reno (47%), followed by Incline Village (40%) and Sand Harbor (35%).

Visitation to specific areas remain consistent year over year, except for Downtown Reno which decreased by 13 percentage points.

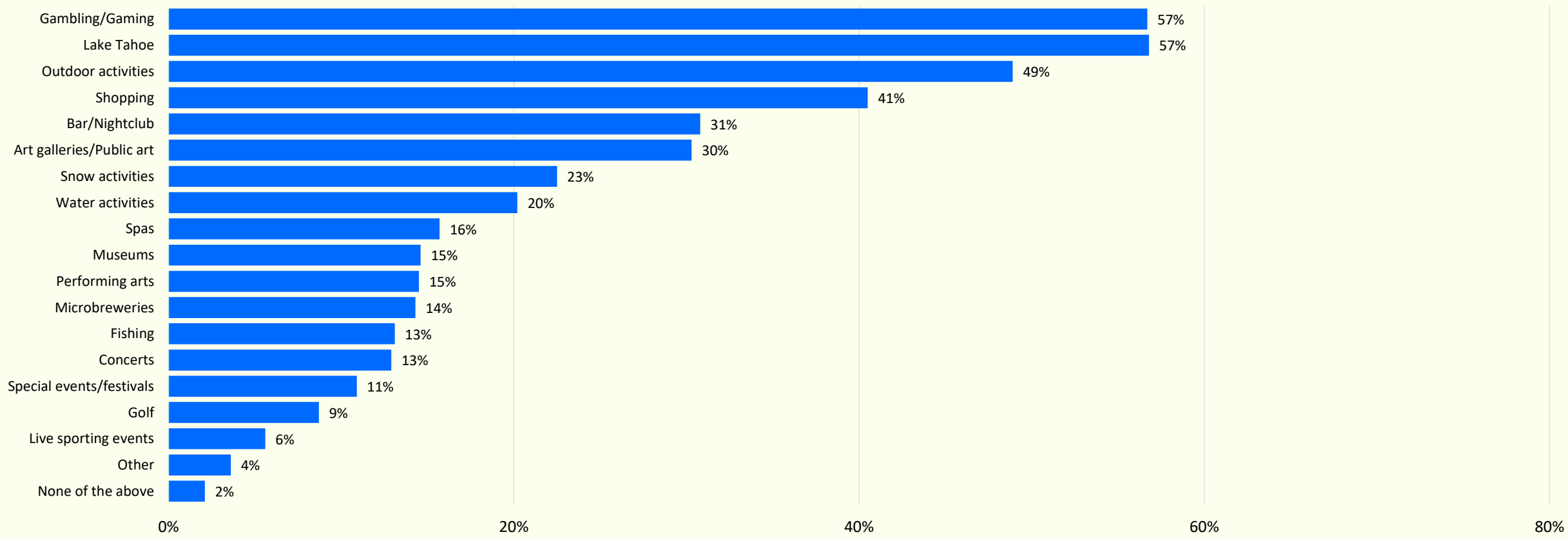
Reno Tahoe Areas Visited



The top activities in market were gambling (57%), visiting Lake Tahoe (57%), and engaging in outdoor activities (49%), which align with primary motivations to visit.

Two-in-five overnight visitors went shopping (41%). Few overnight visitors golfed (9%) or attended a live sporting event (6%).

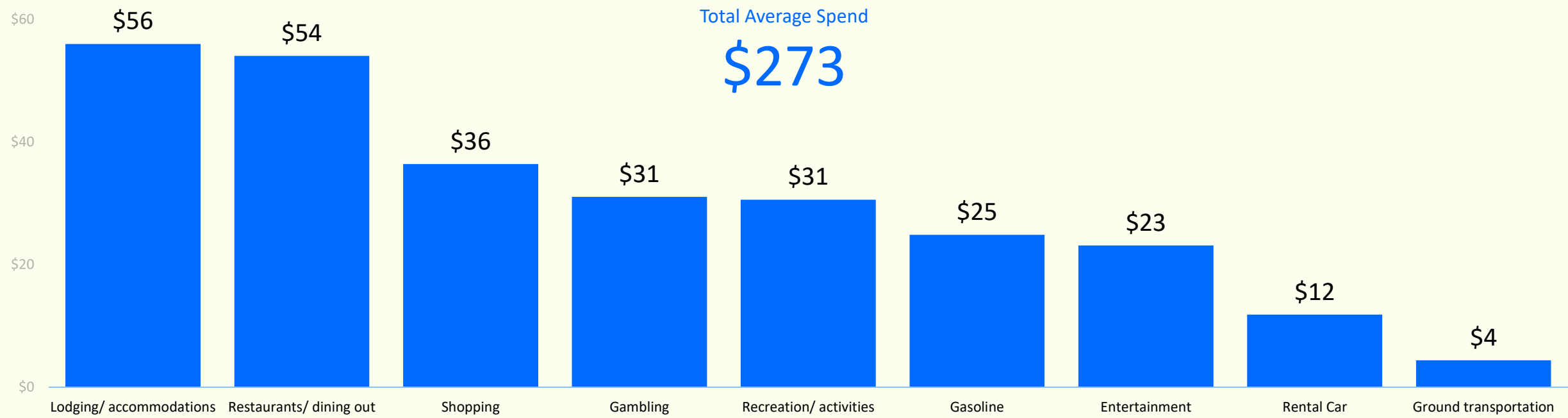
In-Destination Activities



Among overnight visitors, the average daily spend per person was \$273. That amount converts to \$654 per party per day, accounting for 2.4 persons covered.

Lodging was the largest share of in-market spending (\$56), followed closely by dining (\$54).

Daily Spend Per Party Per Category
Average People Covered by Spend = 2.4 persons
Average Length of Stay = 3.2 nights



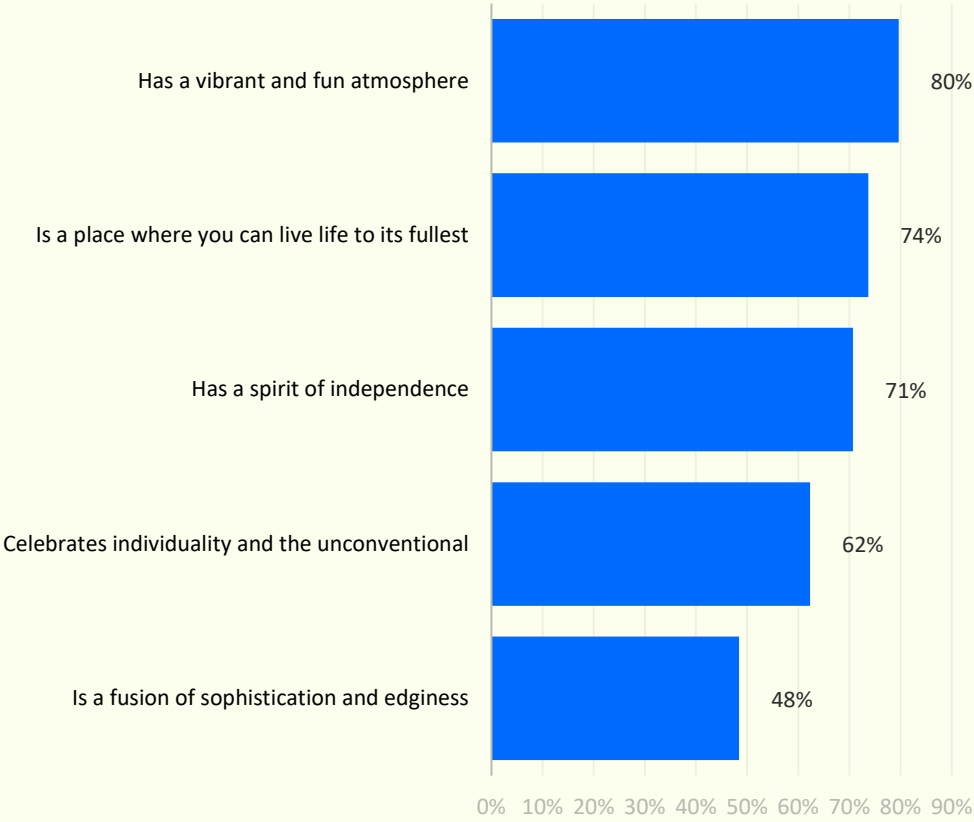
Visitors perceived Reno Tahoe as a vibrant, spirited, and outdoorsy destination.

Most visitors agreed that Reno Tahoe has a vibrant atmosphere (80%), is a place to live life to its fullest (74%), and has a spirit of independence (71%).

Visitors staying in a vacation rental rated Reno Tahoe more positively compared to guests in other accommodations.

Brand Descriptor Ratings

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



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental
Has a vibrant and fun atmosphere	80%	78%	69%	85%
Is a place where you can live life to its fullest	74%	72%	69%	88%
Has a spirit of independence	71%	72%	68%	87%
Celebrates individuality and the unconventional	62%	68%	66%	77%
Is a fusion of sophistication and edginess	48%	56%	61%	70%
Base	600	242	218	166

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

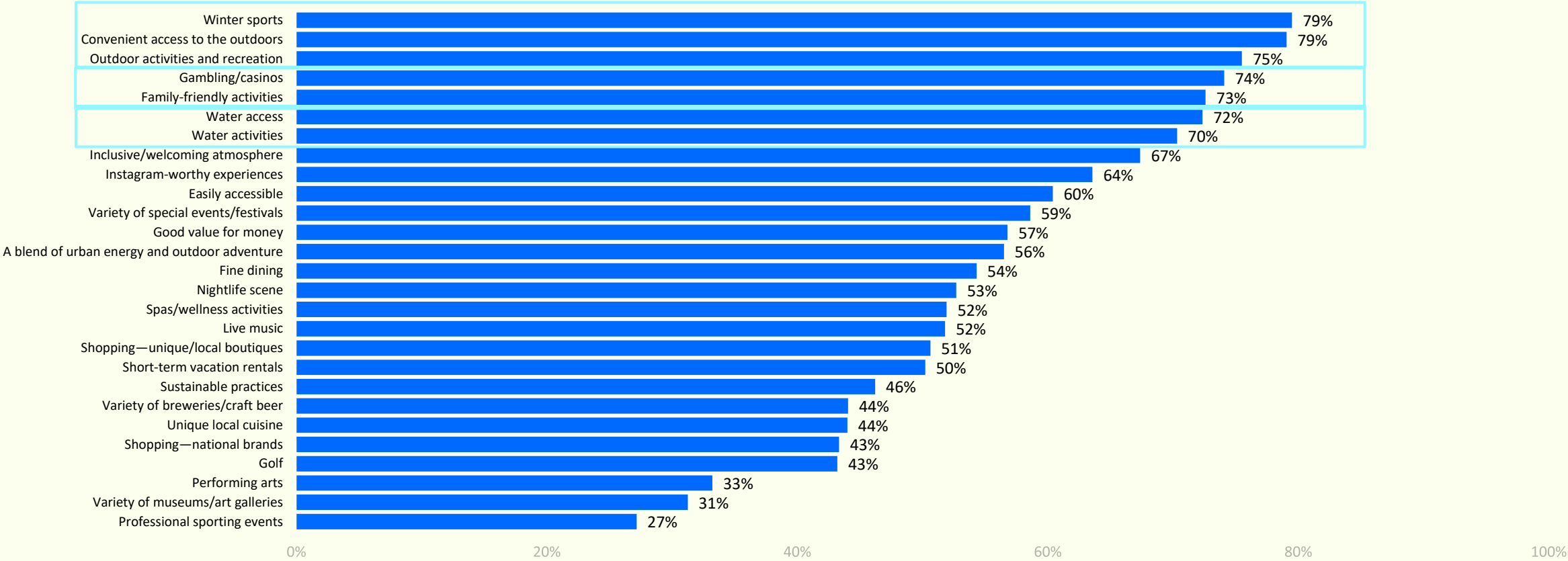
Base: 2024 respondents. 600 completed surveys.

Four-in-five visitors rated the area highly for winter sports (79%) and convenient outdoor access (79%).

Visitors reported that Reno Tahoe underperforms on performing arts (33%), variety of museums/art galleries (31%), and professional sporting events (27%).

Reno Tahoe Destination Attribute Ratings

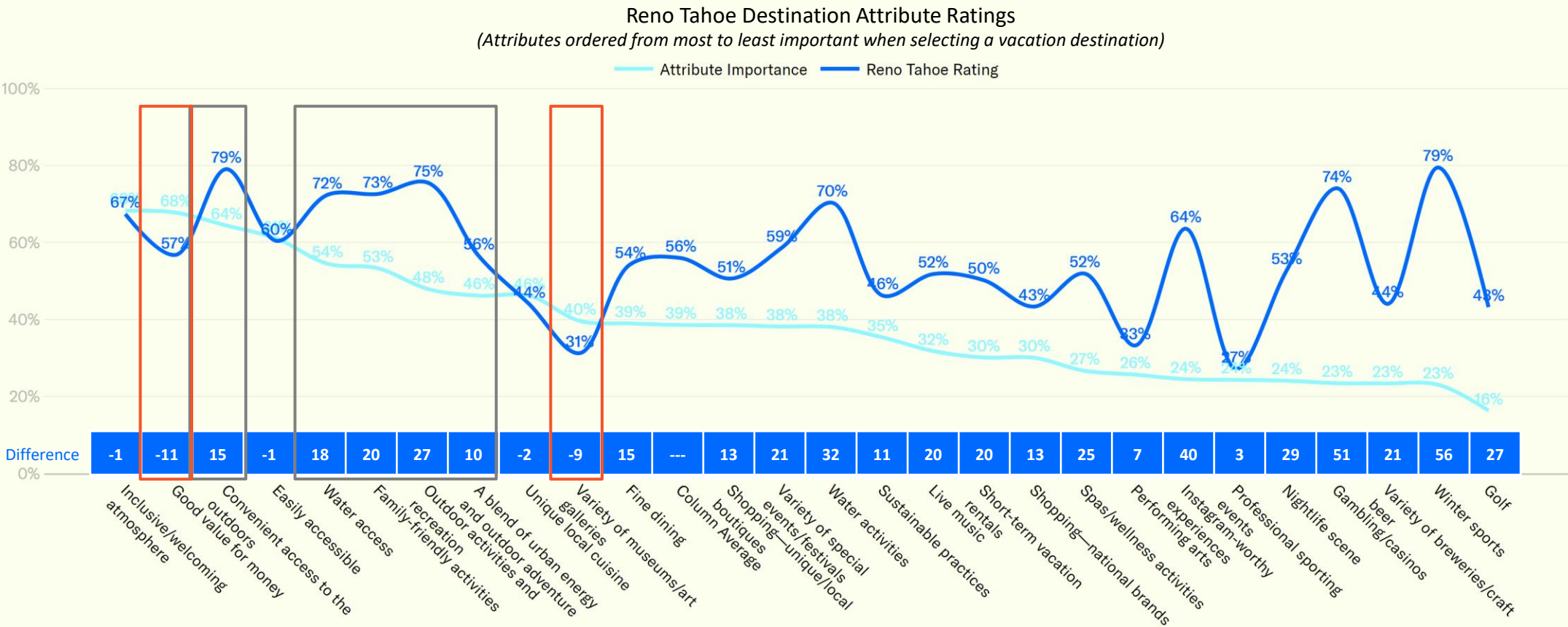
(Top 2 Box Agreement - % selecting "Agree" or "Strongly agree")



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: 2024 respondents. 600 completed surveys.

Visitors reported that Reno Tahoe overperforms on most attributes, though these tend to be less important to their destination decision.

The attributes considered most important when selecting a vacation destination and where Reno Tahoe performs well includes convenient access to the outdoors (+15 percentage points), water access (+18 pp), family-friendly activities (+20 pp), outdoor recreation (+27 pp), and a blend of urban energy and outdoor adventure (+10 pp). Reno Tahoe underperforms on just two attributes: value for the money spent (-11 pp) and variety of museums and art galleries (-9 pp).



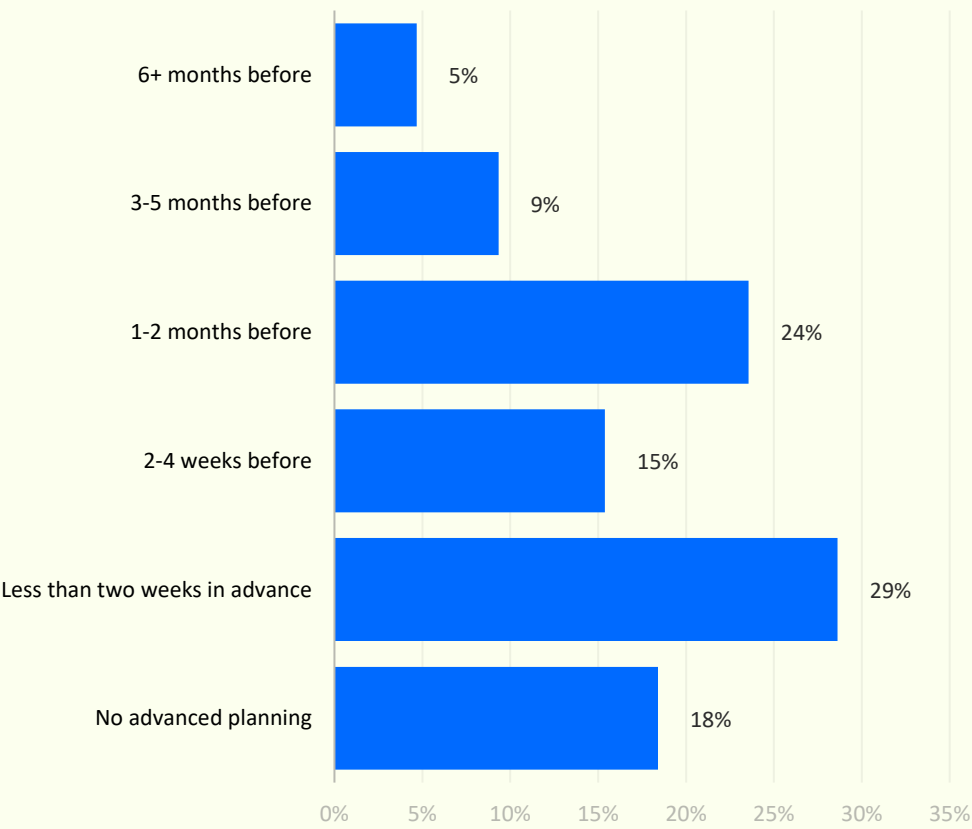
The chart maps the percent of visitors who rated each attribute as “Important” or “Very important” when selecting a vacation destination (turquoise line) against the percent who rated each attribute as “Good” or “Excellent” for Reno Tahoe (royal blue).

Visitors typically planned and booked their trip shortly before their intended arrival.

Most visitors started to plan less than two months before the trip (86%), with an average planning window of 1.2 months.

The most frequently-cited planning window was less than two weeks in advance of their arrival date (29%).

Planning Window



Detail by Lodging Type

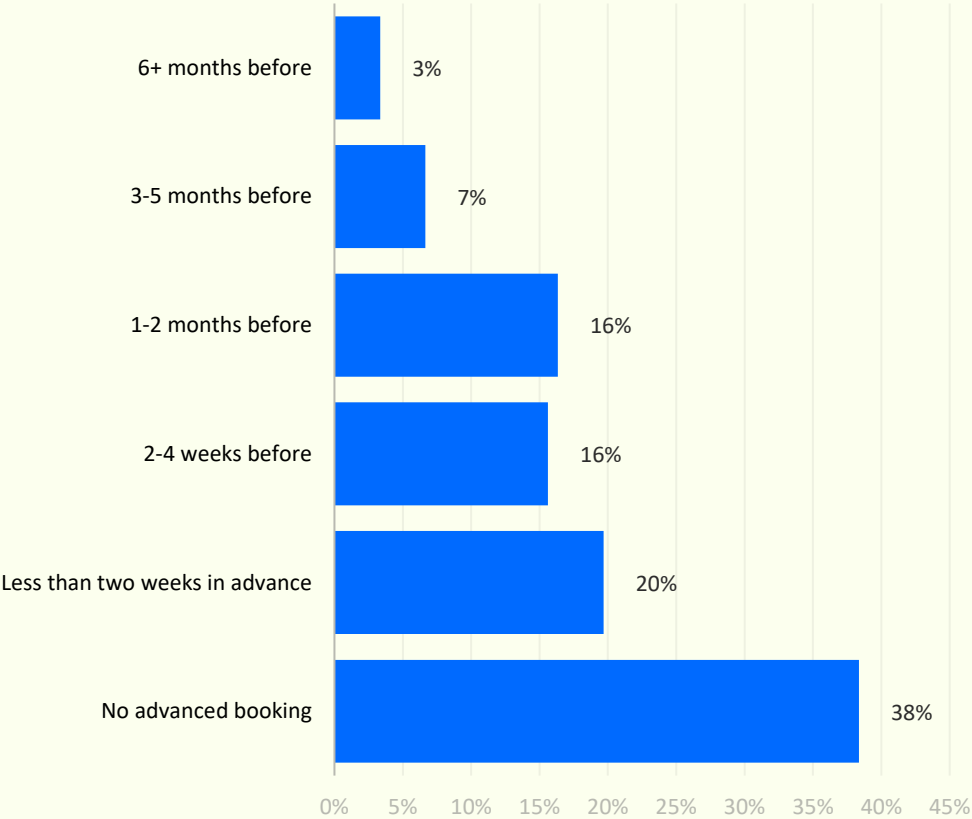
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental
6+ months before	5%	9%	4%	11%
3-5 months before	9%	12%	15%	11%
1-2 months before	24%	28%	24%	29%
2-4 weeks before	15%	24%	26%	24%
Less than two weeks in advance	29%	20%	13%	12%
No advanced planning	18%	8%	18%	13%
Mean (Months)	1.2	1.6	1.4	1.8
Base	600	242	218	166

Question: How far in advance did you begin planning and booking your last trip to Reno Tahoe?
Base: 2024 visitors. 600 completed surveys.

Visitors booked travel arrangements, on average, 0.9 months ahead of their trip.

The most frequently-cited booking window was no advanced booking (38%).

Booking Window



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental
6+ months before	3%	7%	2%	7%
3-5 months before	7%	11%	9%	10%
1-2 months before	16%	23%	24%	20%
2-4 weeks before	16%	25%	22%	26%
Less than two weeks in advance	20%	23%	28%	26%
No advanced booking	38%	11%	14%	10%
Mean (Months)	0.9	1.5	1.1	1.4
Base	600	242	218	166

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

Base: 2024 visitors. 600 completed surveys.

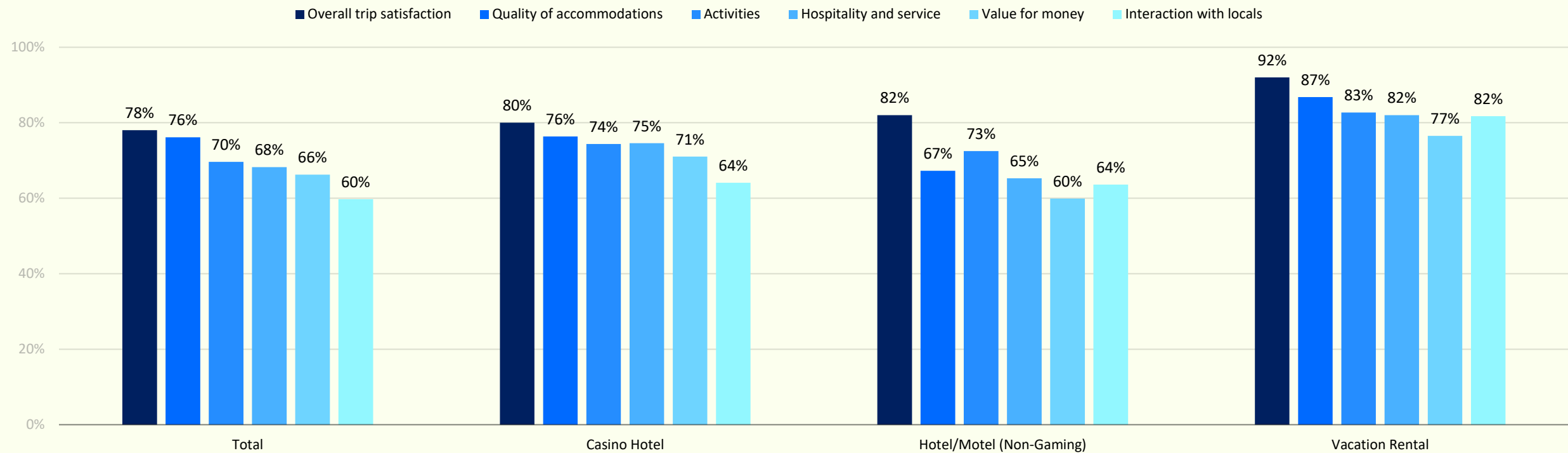
Visitors had a positive Reno Tahoe experience and are likely to return.

Most visitors reported high satisfaction with their trip experience (78%), especially those staying in a vacation rental (92%).

Visitors staying in a vacation rental typically showed the highest satisfaction levels across categories, while those staying in a non-gaming hotel reported the lowest levels.

Trip Satisfaction by Category

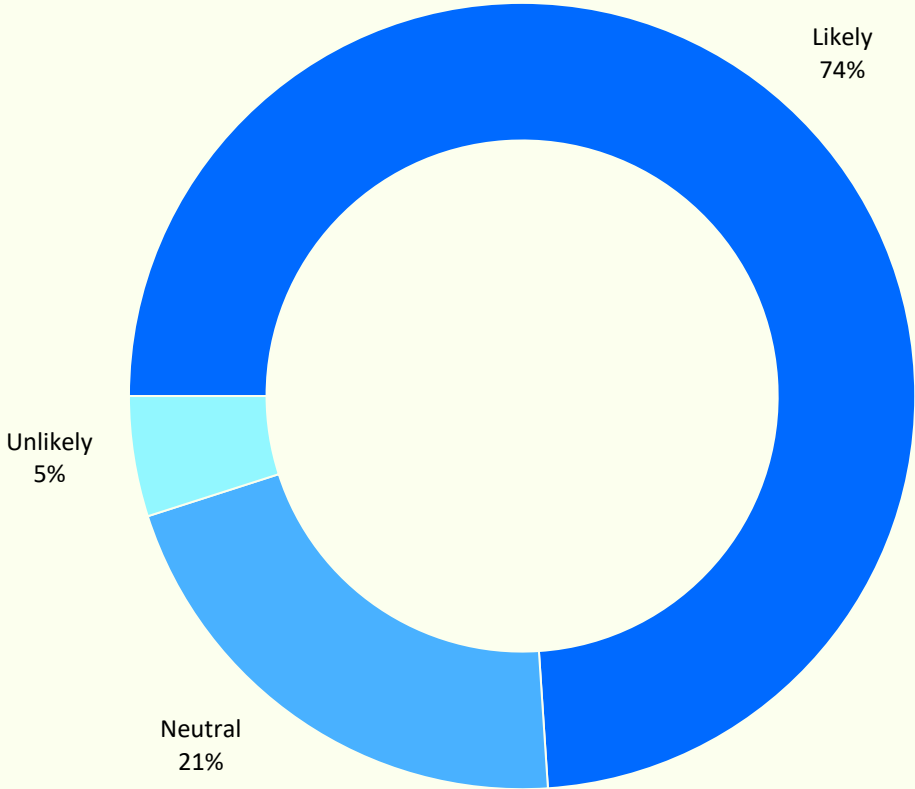
(Top 3 Box Satisfaction - % rating "8" + "9" + "10 - Extremely satisfied")



Most visitors would recommend Reno Tahoe to others as a place to visit (74%).

Visitors staying in a vacation rental (84%) were more likely to the recommend the region to others.

Likelihood to Recommend



Detail by Lodging Type

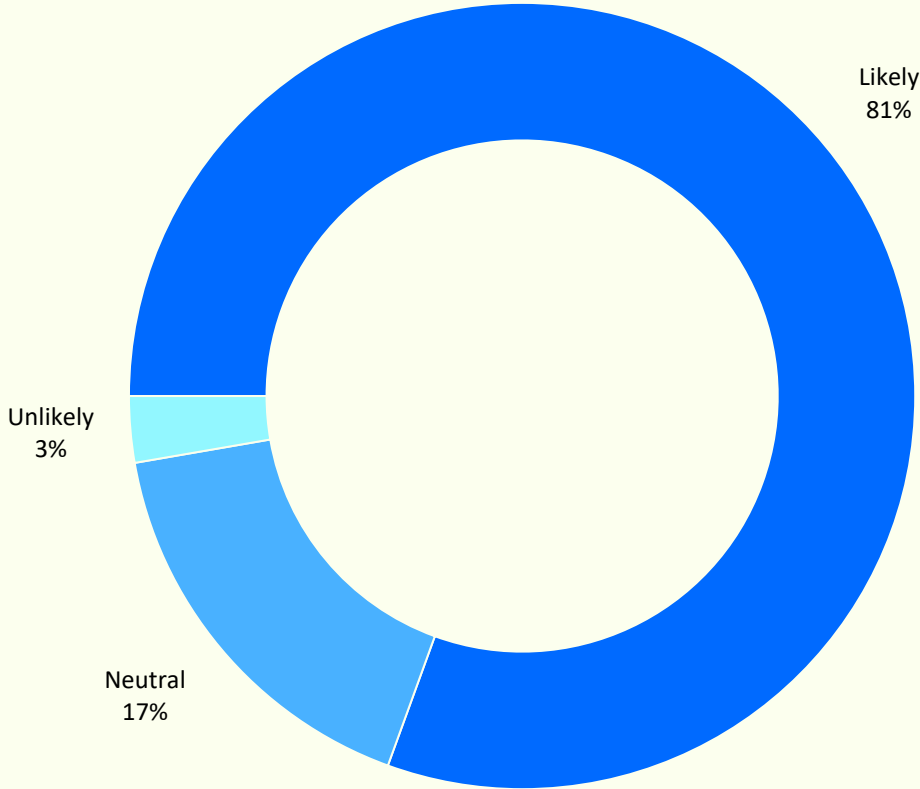
	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental
Likely	74%	75%	76%	84%
Neutral	21%	19%	21%	16%
Unlikely	5%	6%	3%	0%
Base	600	242	218	166

Question: How likely are you to recommend the Reno Tahoe region as a place to visit to friends/family?
Base: 2024 visitors. 600 completed surveys.

Four-in-five visitors said they would likely return to Reno Tahoe in the future (81%).

Visitors staying in a vacation rental (86%) were more likely to return to the region while those staying in a non-gaming hotel were less likely to return (75%).

Likelihood to Return



Detail by Lodging Type

	Total	Casino Hotel	Hotel/Motel (Non-Gaming)	Vacation Rental
Likely	81%	80%	75%	86%
Neutral	17%	15%	21%	12%
Unlikely	3%	5%	4%	2%
Base	600	242	218	166

Question: How likely are you to return to the Reno Tahoe region in the future?
Base: 2024 visitors. 600 completed surveys.



Resident Sentiment

Research Overview

Resident Sentiment

The primary objective of this research is to understand Washoe County residents' perceptions of tourism and the impact on their quality of life.

To meet this research objective, Future Partners conducted an online survey of N=400 Washoe County residents, aged 18 and older.

Data was collected monthly from July – December 2024. All data presented within this report is weighted based on county demographics.

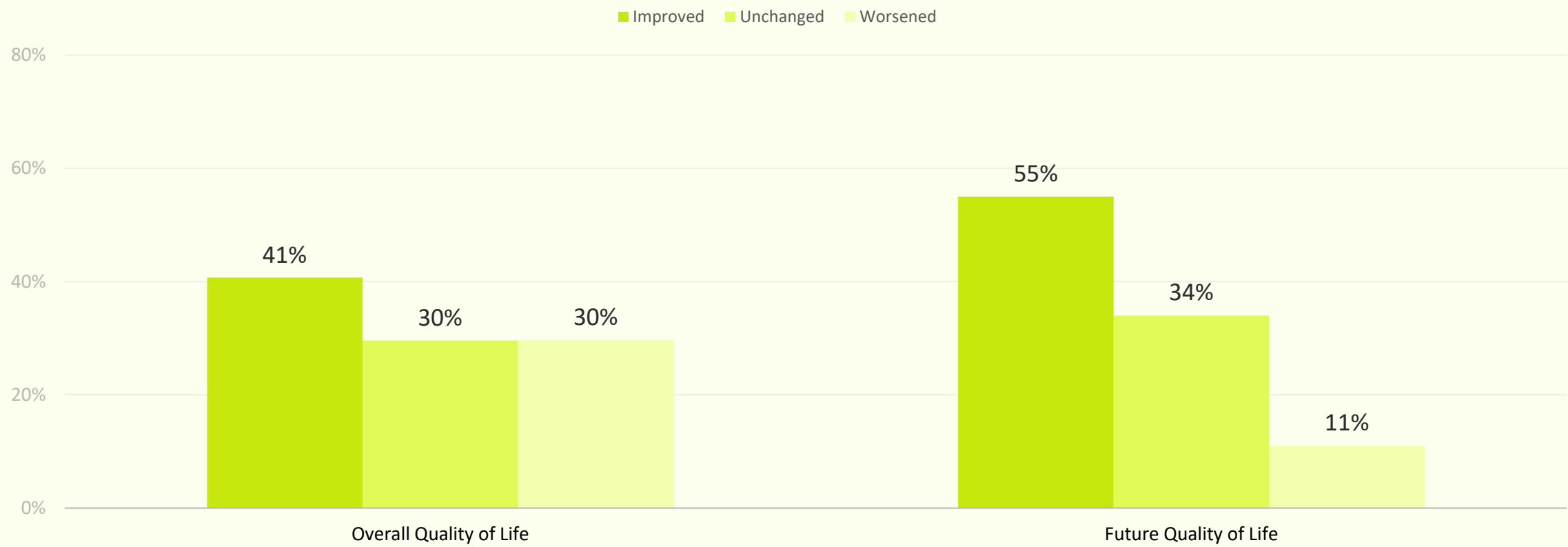


Executive Summary

Residents have positive perceptions about the local tourism industry and its impact on their personal lives.

In general, Washoe County residents feel that their quality of life has improved compared to a year ago (41%) and a larger share of residents are optimistic about their future quality of life (55%).

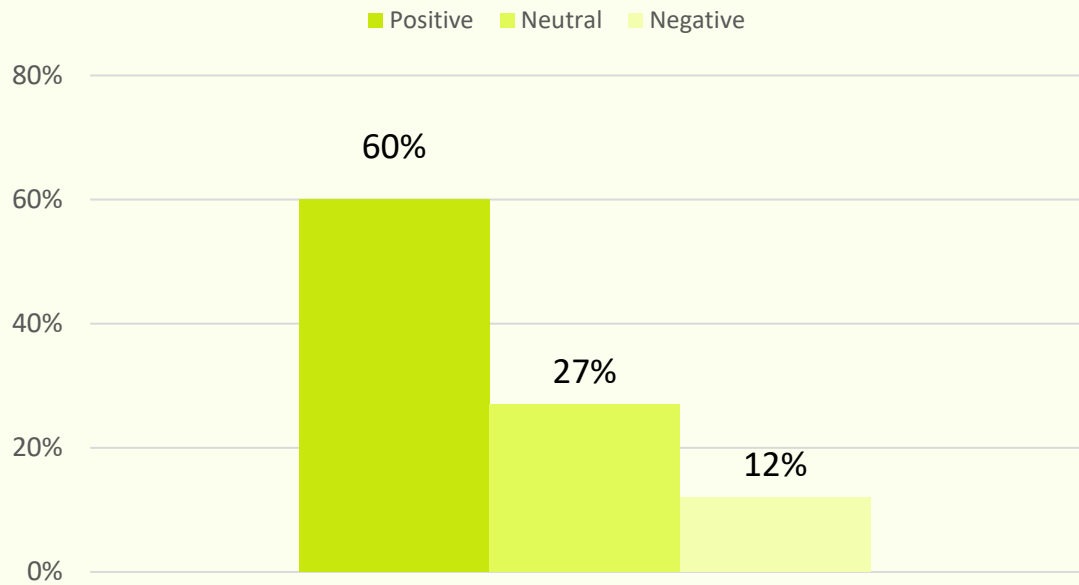
Quality of Life



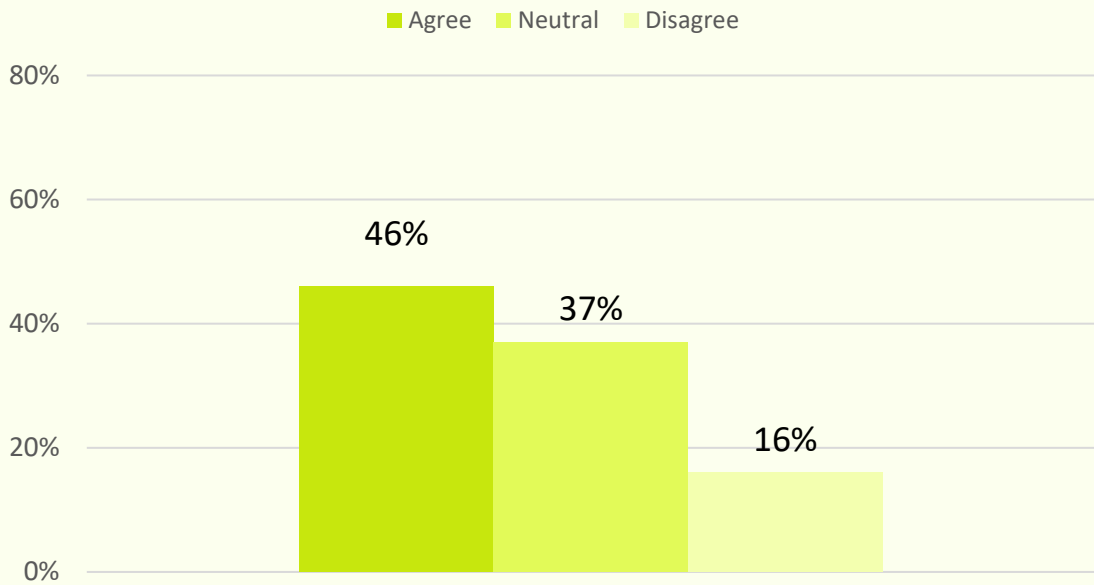
Question: Compared to one year ago, how would you rate your personal quality of life? | Thinking one year ahead, how do you expect your personal quality of life to change?

Residents have positive perceptions about Washoe County’s tourism industry (60%) and agree that it results in a better quality of life (46%).

Perceptions of Washoe County’s Tourism Industry



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

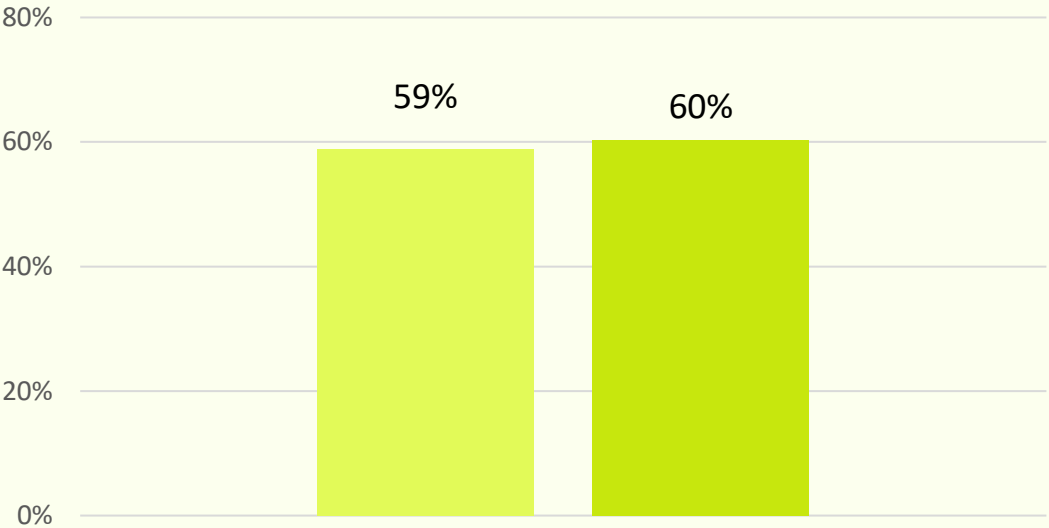


Question: In general, what are your overall perceptions of Nevada’s / Washoe County’s tourism industry? | Please rate how much you agree or disagree with the following statement: *Overall, Nevada’s / Washoe County’s tourism industry results in a better quality of life for me and my family.*

Tourism industry sentiment has remained relatively consistent year over year.

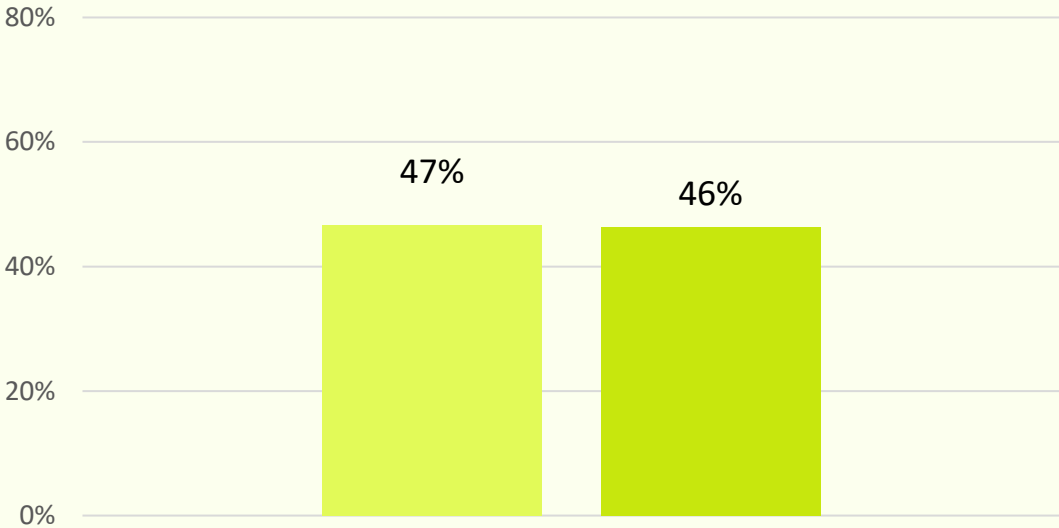
Perceptions of Washoe County’s Tourism Industry
(Top 2 Box - % selecting "4 – Somewhat positive" or "5 – Extremely positive")

2023 2024



Impact of Washoe County’s Tourism Industry on Quality of Life
(Top 2 Box - % selecting "4 – Agree" or "5 – Strongly agree")

2023 2024



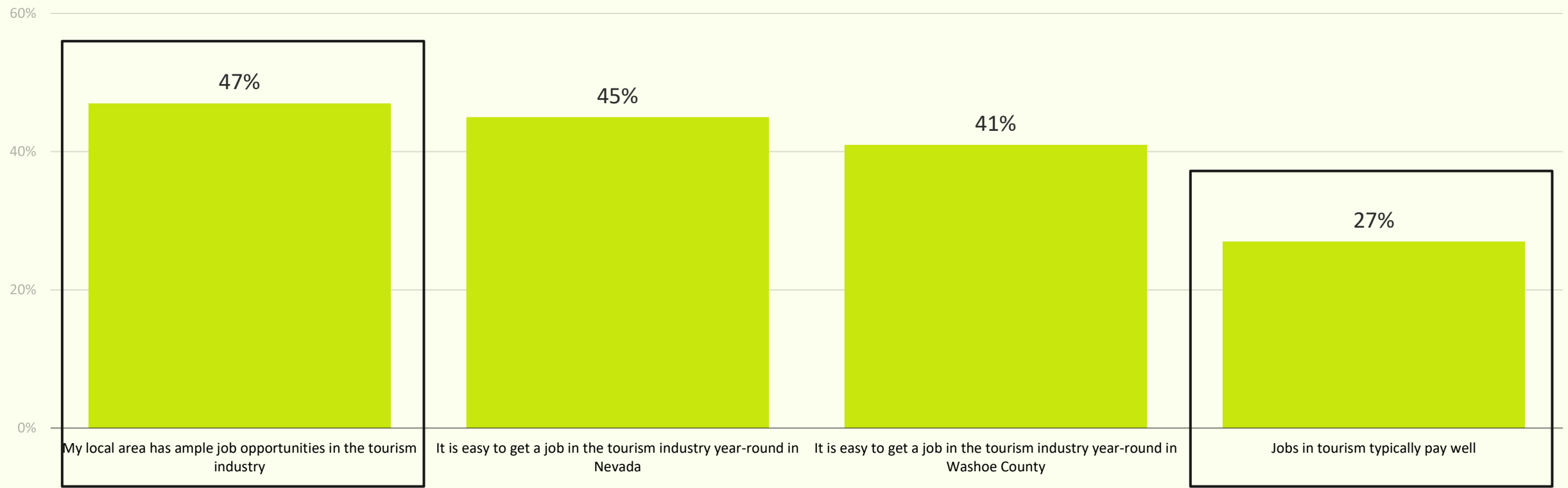
Question: In general, what are your overall perceptions of Nevada’s / Washoe County’s tourism industry? | Please rate how much you agree or disagree with the following statement: *Overall, Nevada’s / Washoe County’s tourism industry results in a better quality of life for me and my family.*

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

Residents may be hesitant to pursue tourism jobs due to the perception of low wages, despite readily-available jobs opportunities.

Approximately half of Washoe County residents agree that the local tourism industry provides ample job opportunities (47%). However, only a quarter agree that tourism jobs pay well (27%).

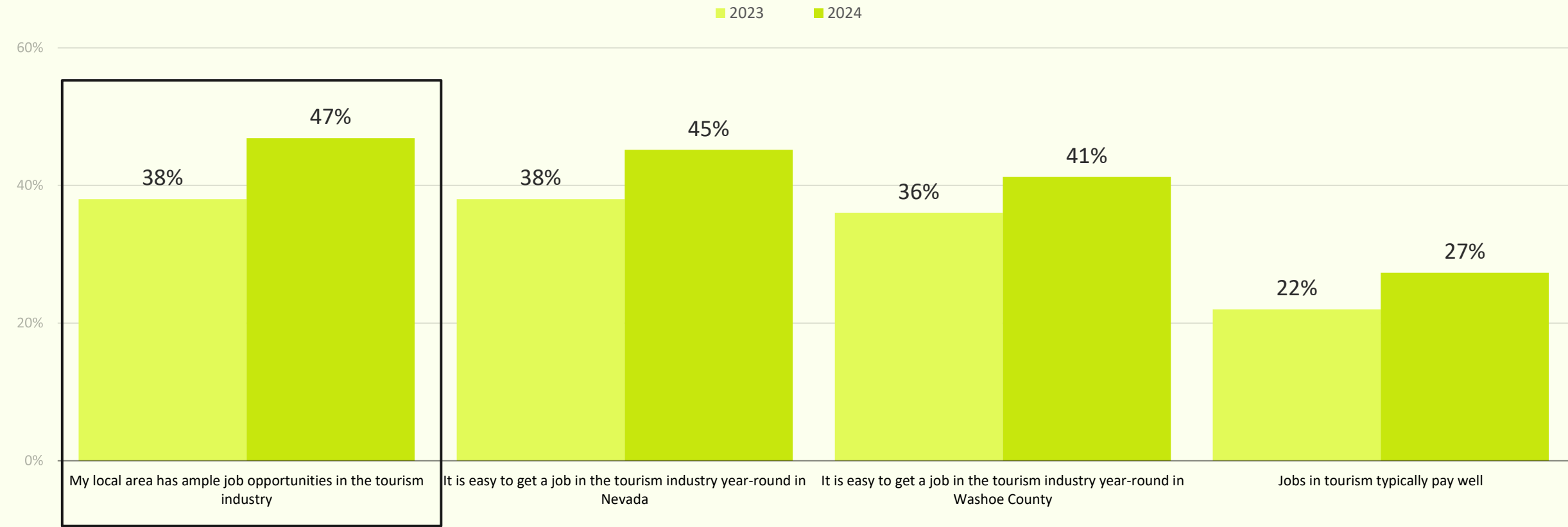
Tourism Industry Impact on Jobs
(Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")



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."

Resident perceptions about tourism’s impact on jobs has improved compared to 2023.

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.”

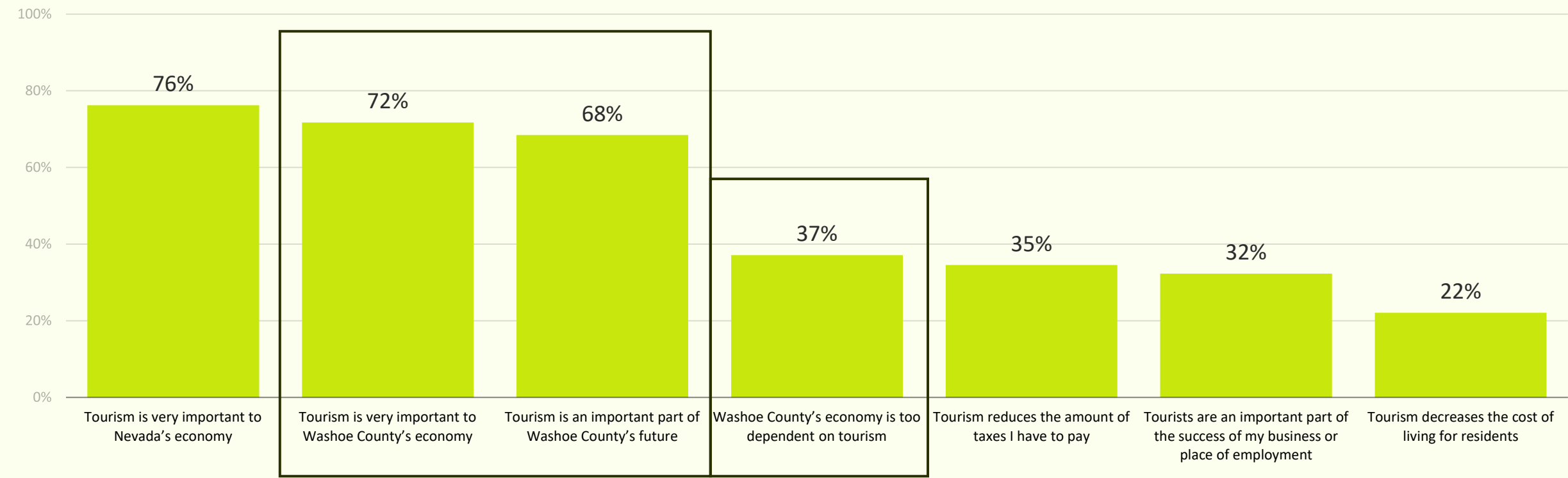
Tourism is seen as important to Washoe County's economy and the industry is considered important to Washoe County's future.

Most residents believe tourism is important to Washoe County’s economy (72%) and they 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%).

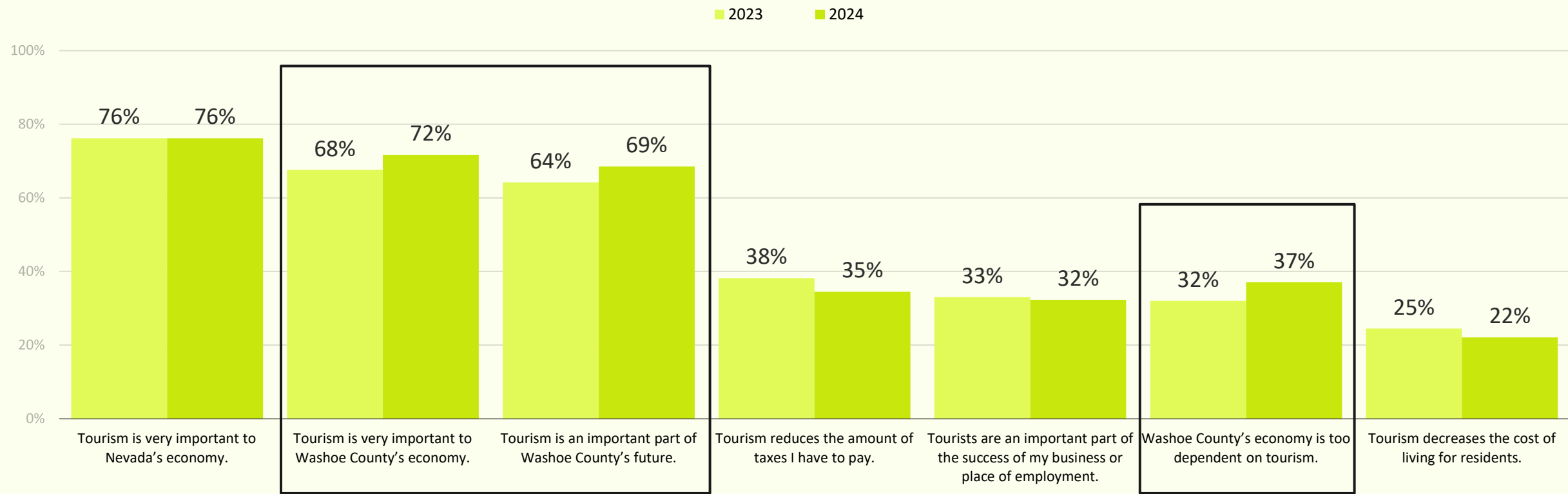
Tourism Industry Impact on Economy

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



Residents increasingly believe in the positive economic impact of tourism, yet their concerns have also grown in the past year.

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



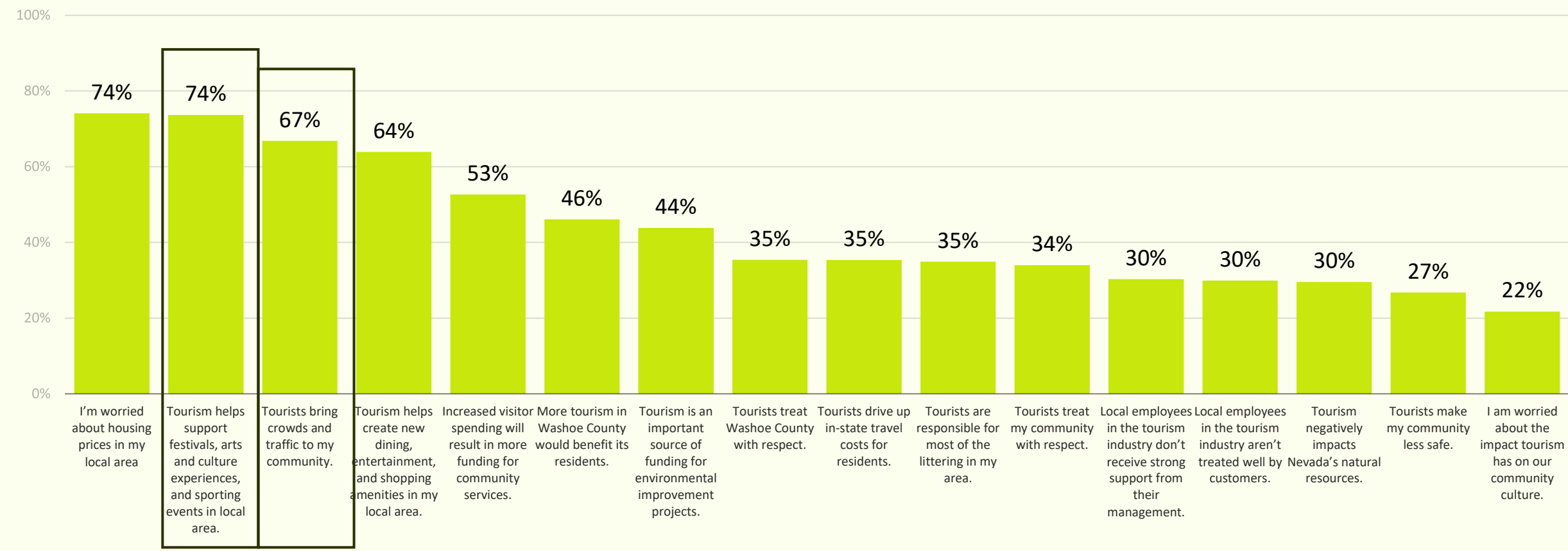
While residents express concerns about the impacts of tourism to their community, they also acknowledge the industry's many benefits.

Residents believe tourism significantly impacts the community, highlighting the need to balance conflicting perspectives.

Most Washoe County residents acknowledge tourism’s support of local festivals, sporting events, and cultural experiences (74%), yet a similar share feel that tourism causes crowds and traffic (67%).

Tourism Industry Impact on Community

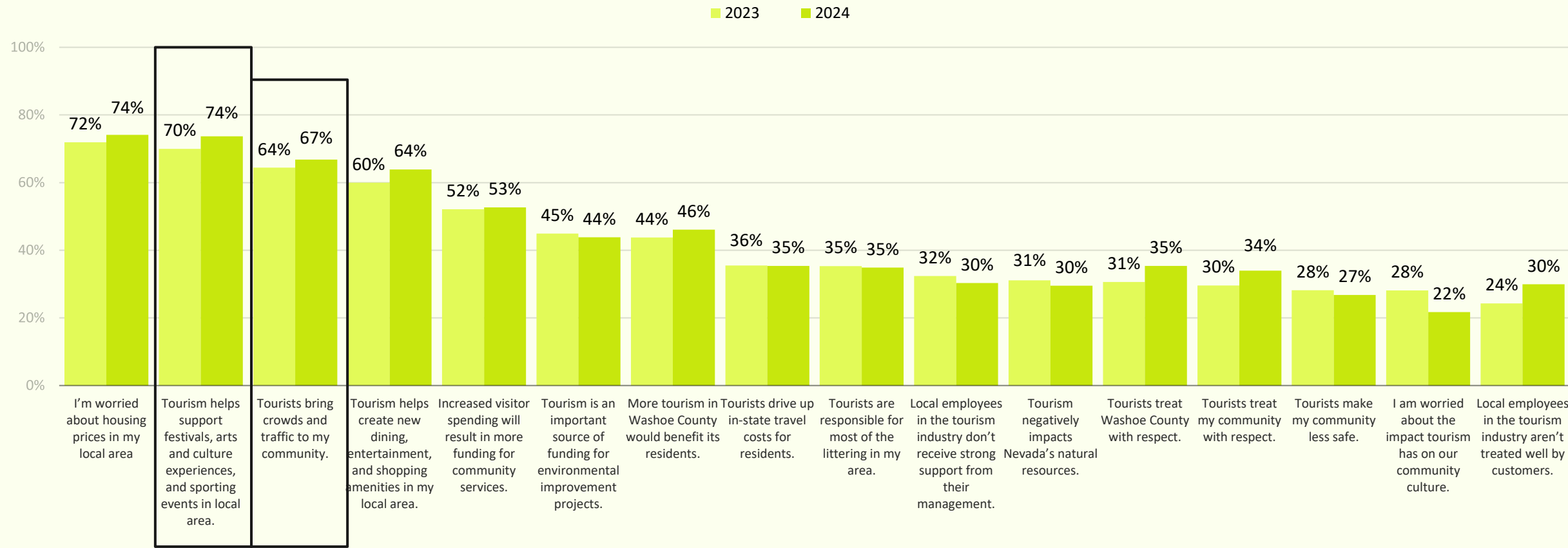
(Top 2 Box Agreement - % selecting "4" or "5 - Strongly agree")



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

Compared to 2023, residents increasingly see the benefits of tourism for the community, yet they are also more aware of the challenges it may bring.

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



Future Partners