



Bay Area Awareness Survey *Summary Presentation*

*RSCVA Board of Directors Meeting
September 25, 2014*



Reno-Sparks Convention and
Visitors Authority

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Project Overview

- ▶ Analyze opinions of Reno as a getaway destination of adults age 21+ in the Bay Area DMA
- ▶ Examine knowledge of Reno Tahoe USA media campaign and attraction in visiting
- ▶ Assess and track Reno brand attributes
- ▶ Track adjustments of opinions or attitudes over time

Methodology: 1,000 interviews with Bay Area adults aged 21 and up conducted twice a year, in February and August (margin of error \pm 3.1 percentage points). August 2014 survey conducted 100% online; prior surveys were conducted 80% online and 20% by telephone.

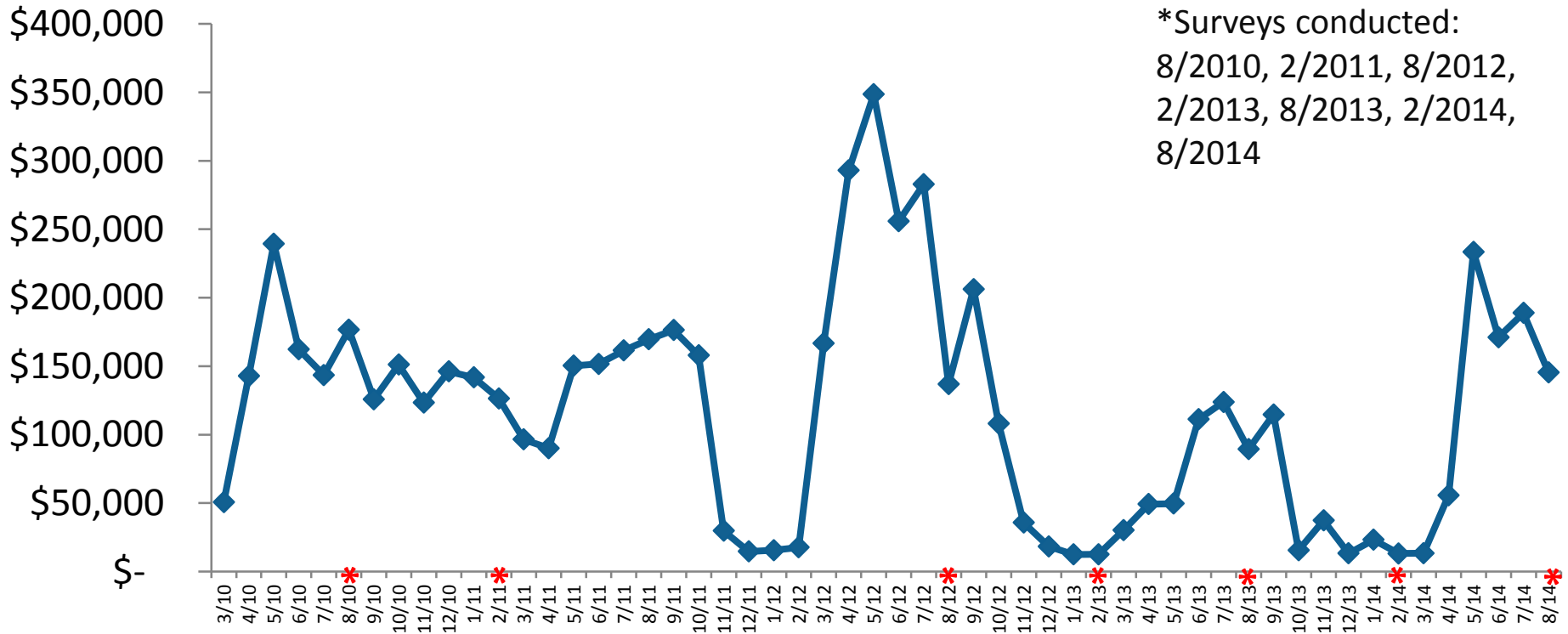
Key Findings

- ▶ Reno's awareness, brand rating, and desire to visit have gone up following a period of increased media spending.
 - This follows a pattern observed in earlier surveys that followed media spend increases.
- ▶ In particular, attributes related to events and activities are seeing a sustained increase in their association with Reno, on top of the usual summer seasonal awareness increase.
- ▶ Both traditional and “new” media are significant sources of Reno information; social media is a rising category with positive impact.
- ▶ While self-reported visitation to Reno has not changed significantly, mention of Reno as a top-of-mind getaway destination are up.
- ▶ A sustained media campaign with a combination of traditional and peer-to-peer avenues is likely to help Reno maintain gains in brand and desire to visit.
 - Recent increases in awareness among identified core and target markets indicate that current media targeting strategies are making impacts where they should.

The RSCVA's Monthly Media Spending

Media spending has increased in recent months.

◆ Approximate Monthly Media Spending

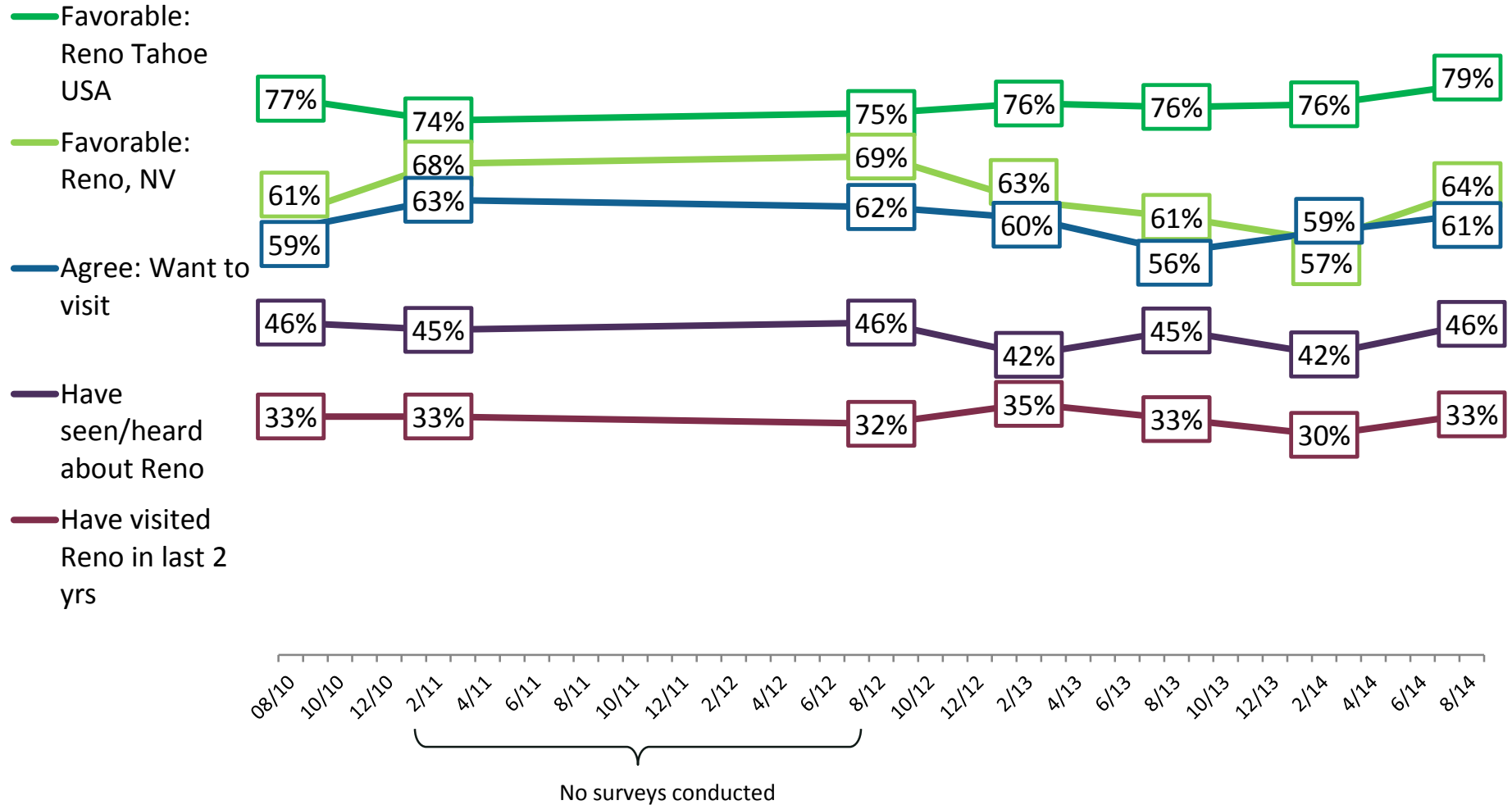


Monthly media spending information provided by the RSCVA



Key Reno Indicators

Awareness, brand rating, and interest in visiting have moved up with the recent increase in media spending.



Please rate your opinion of Reno, Nevada (Q6), Reno Tahoe USA (Q7); Rate your agreement: Reno is a place I want to visit. (Q11); Have you heard or read anything lately about Reno? (Q8); Have you visited Reno as an adult? (Q25)

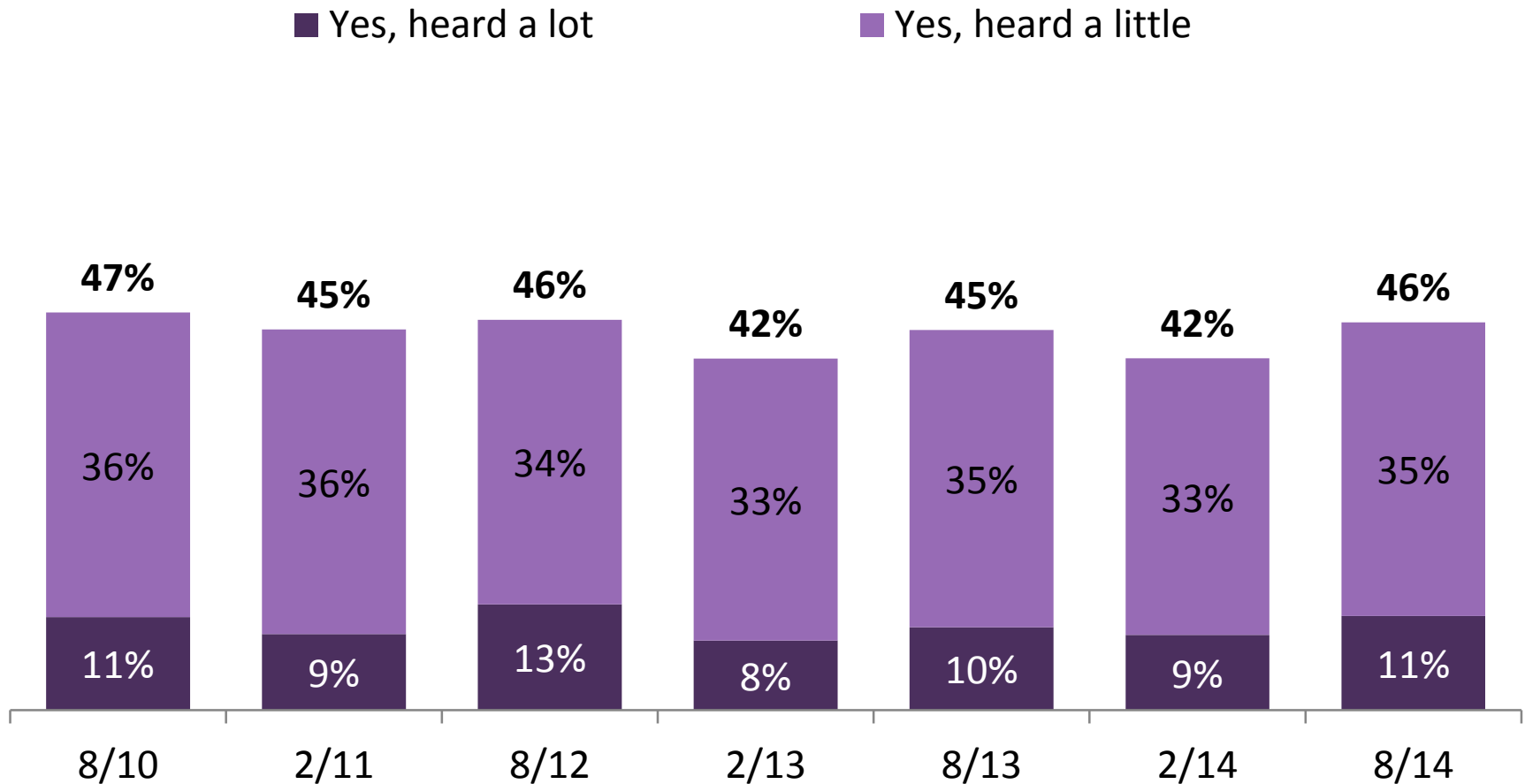




Awareness & Brand Strength

Awareness of Reno

Just under half recall hearing something about Reno lately.

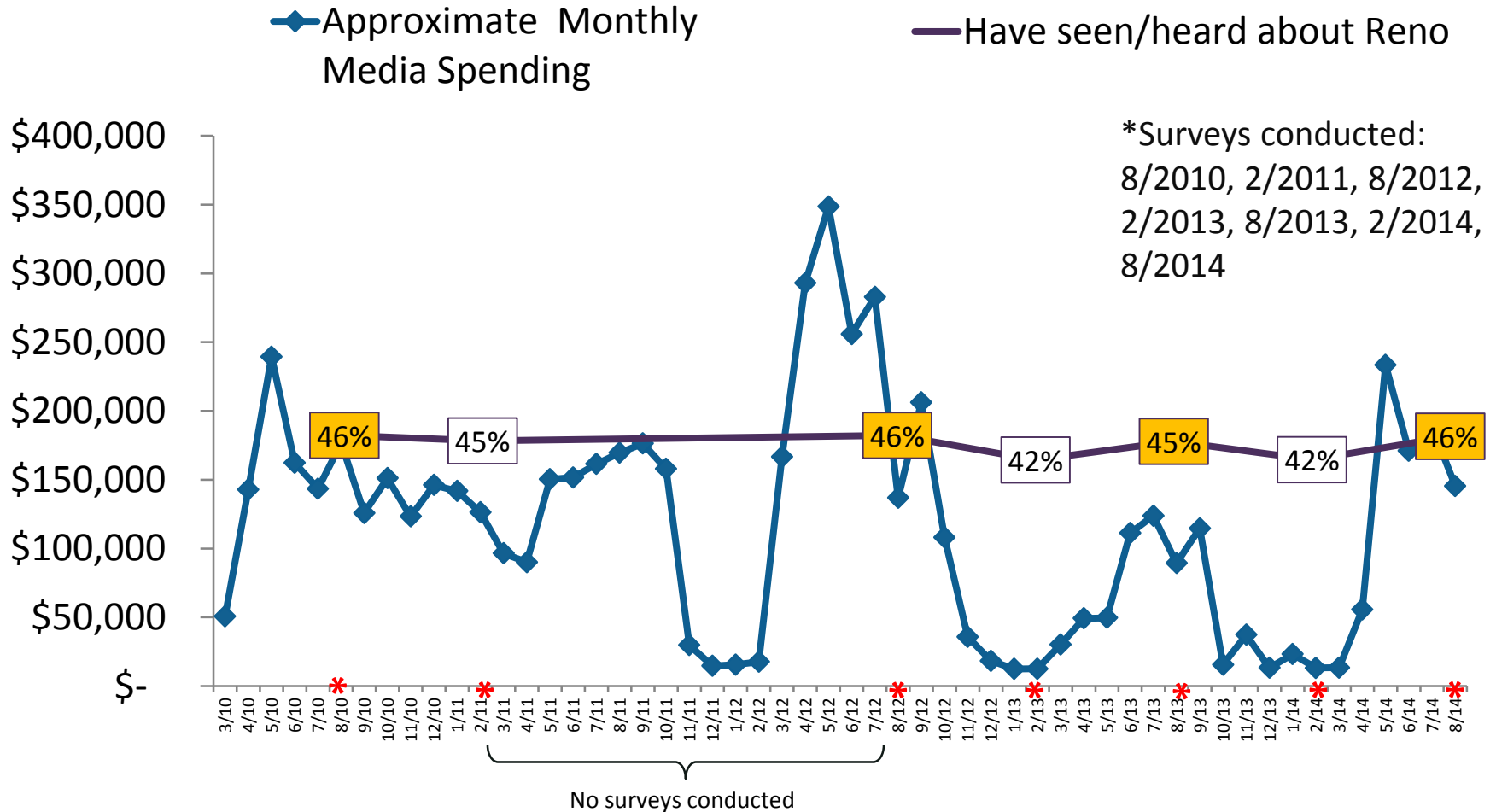


Have you heard or read anything lately about Reno? (Q8)



The RSCVA's Monthly Media Spending & Awareness

Both awareness and media spending are higher during the summer months.



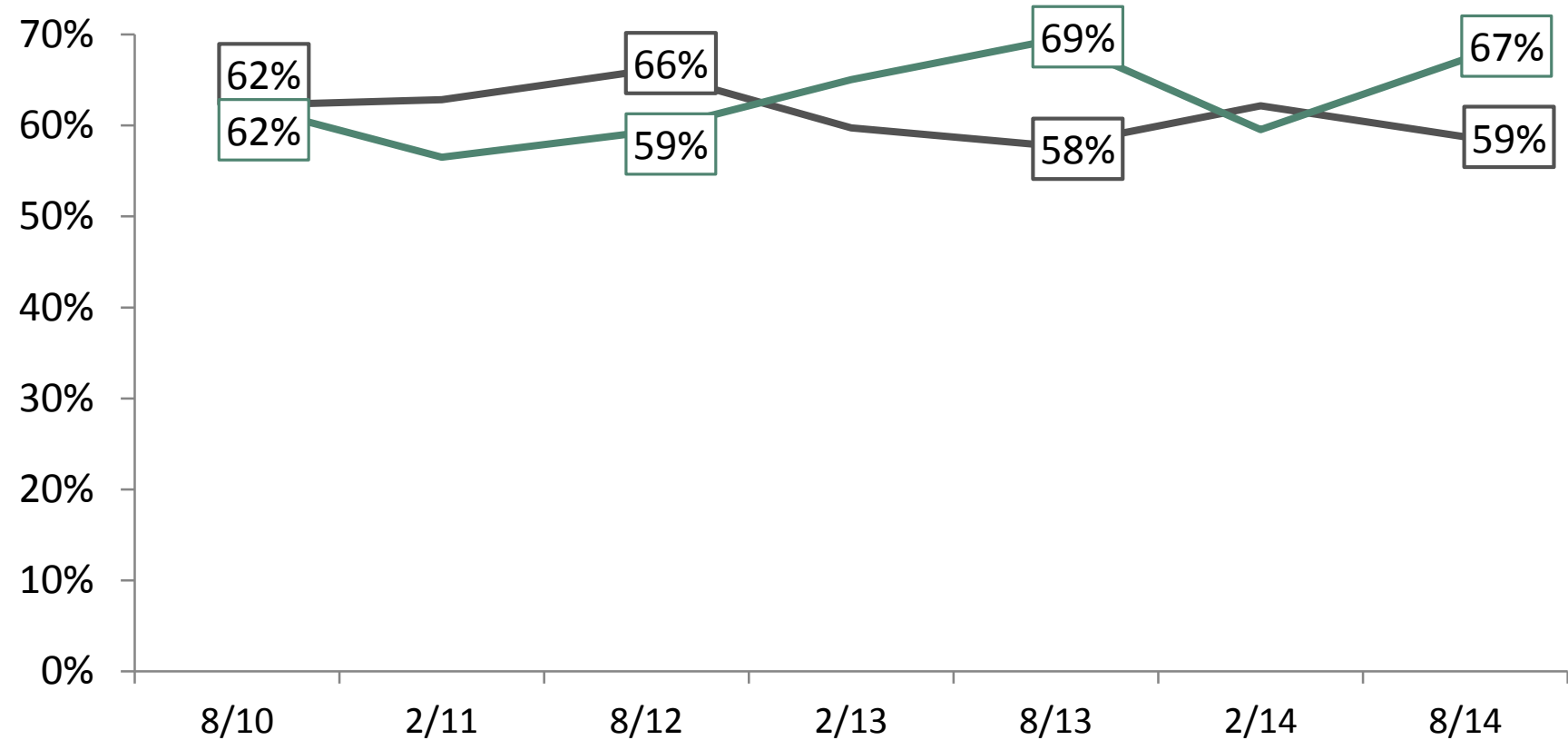
Monthly media spending information provided by the RSCVA



Information Sources

Both traditional and new media are significant sources of information about Reno.

- Traditional Media (TV, Radio, Newspaper, Magazine, Billboards)
- Internet/Social Media/Word of Mouth

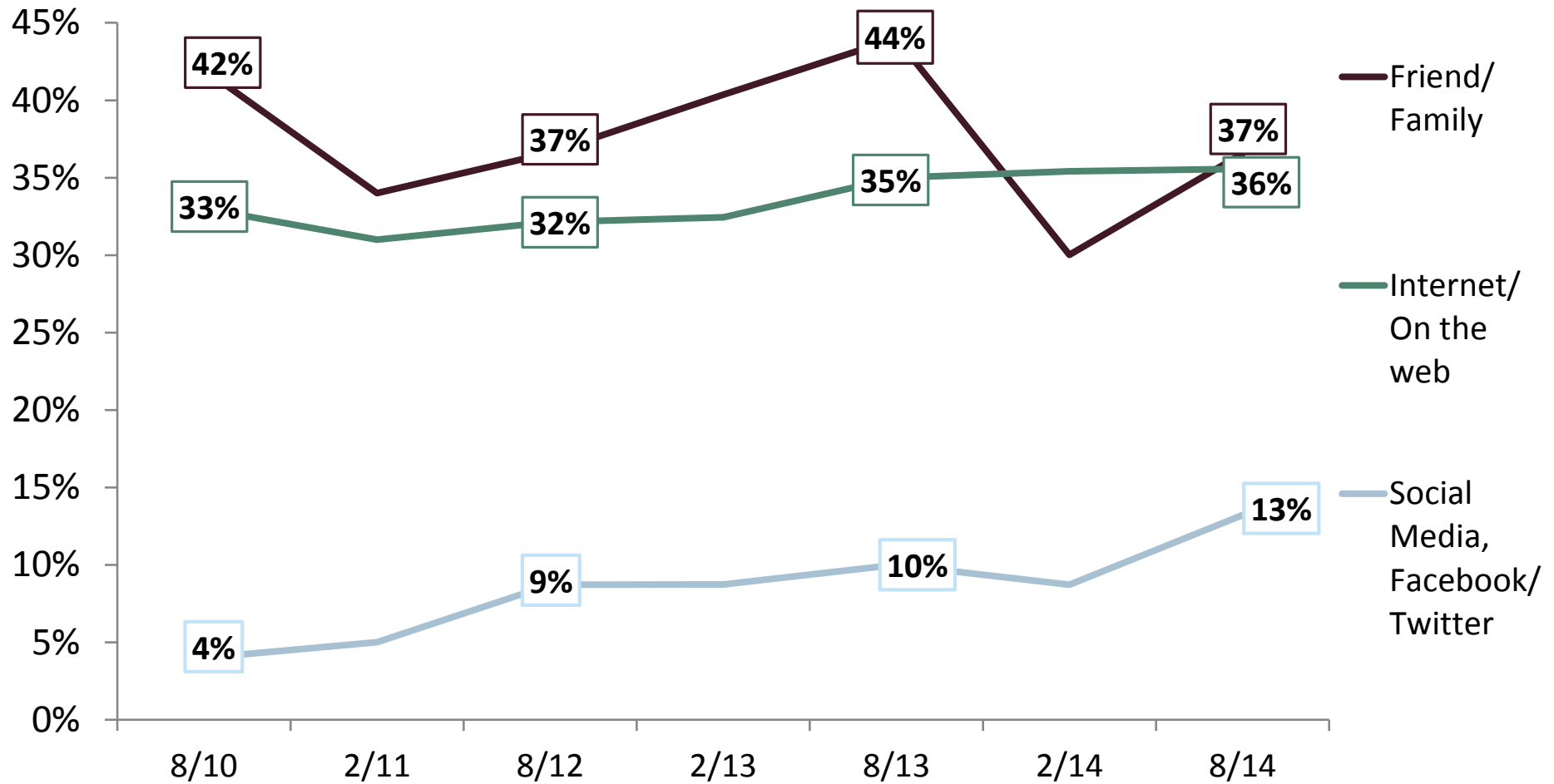


And where have you heard or read about Reno lately? (Q10) (*If heard' n=459*)



Information Sources: Internet/Social Media/Word of Mouth

Word-of-mouth awareness is returning to previous levels. Social media recall is on the rise.

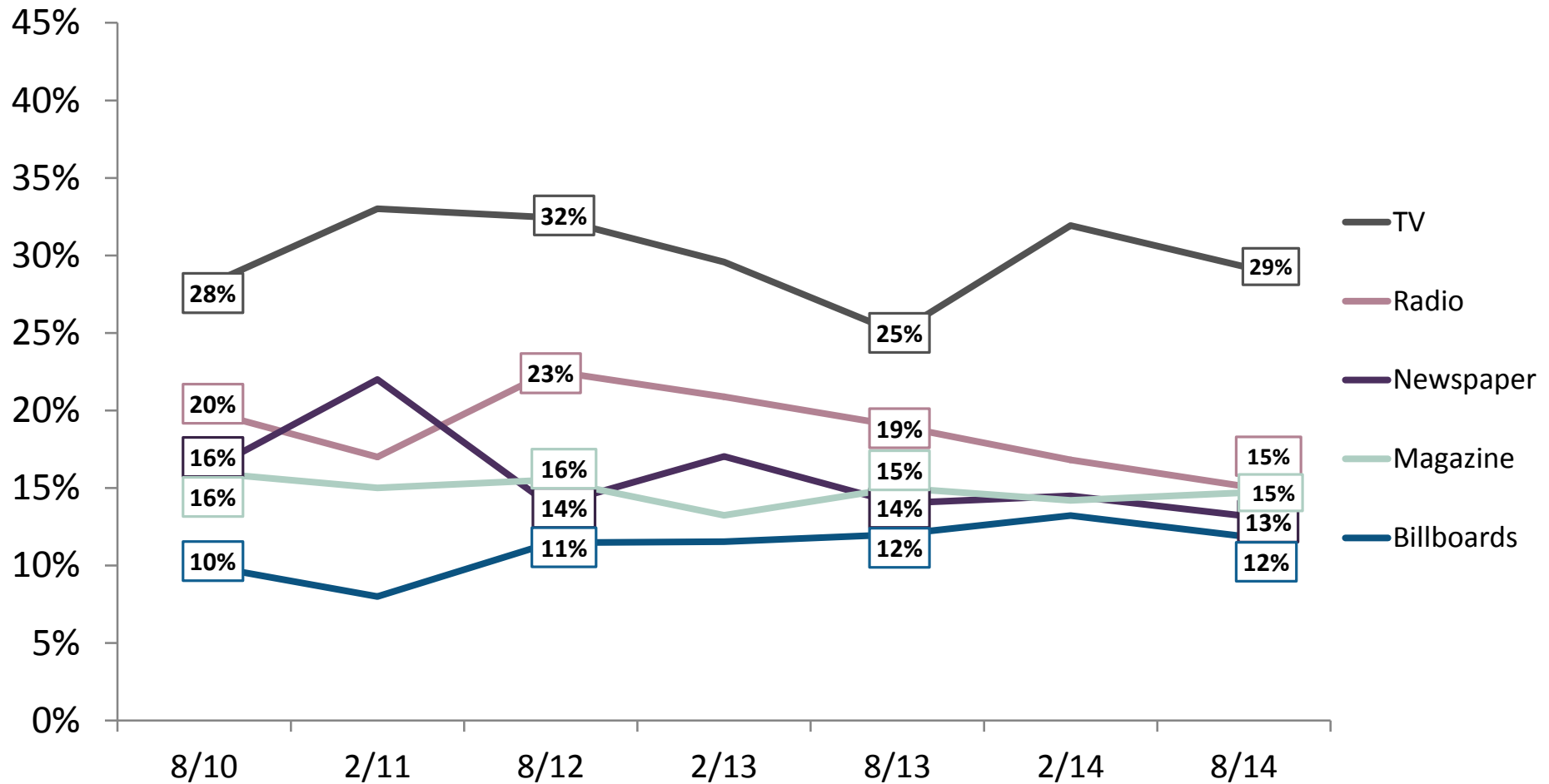


And where have you heard or read about Reno lately? (Q10) (*'If heard' n=459*)



Information Sources: Traditional Media

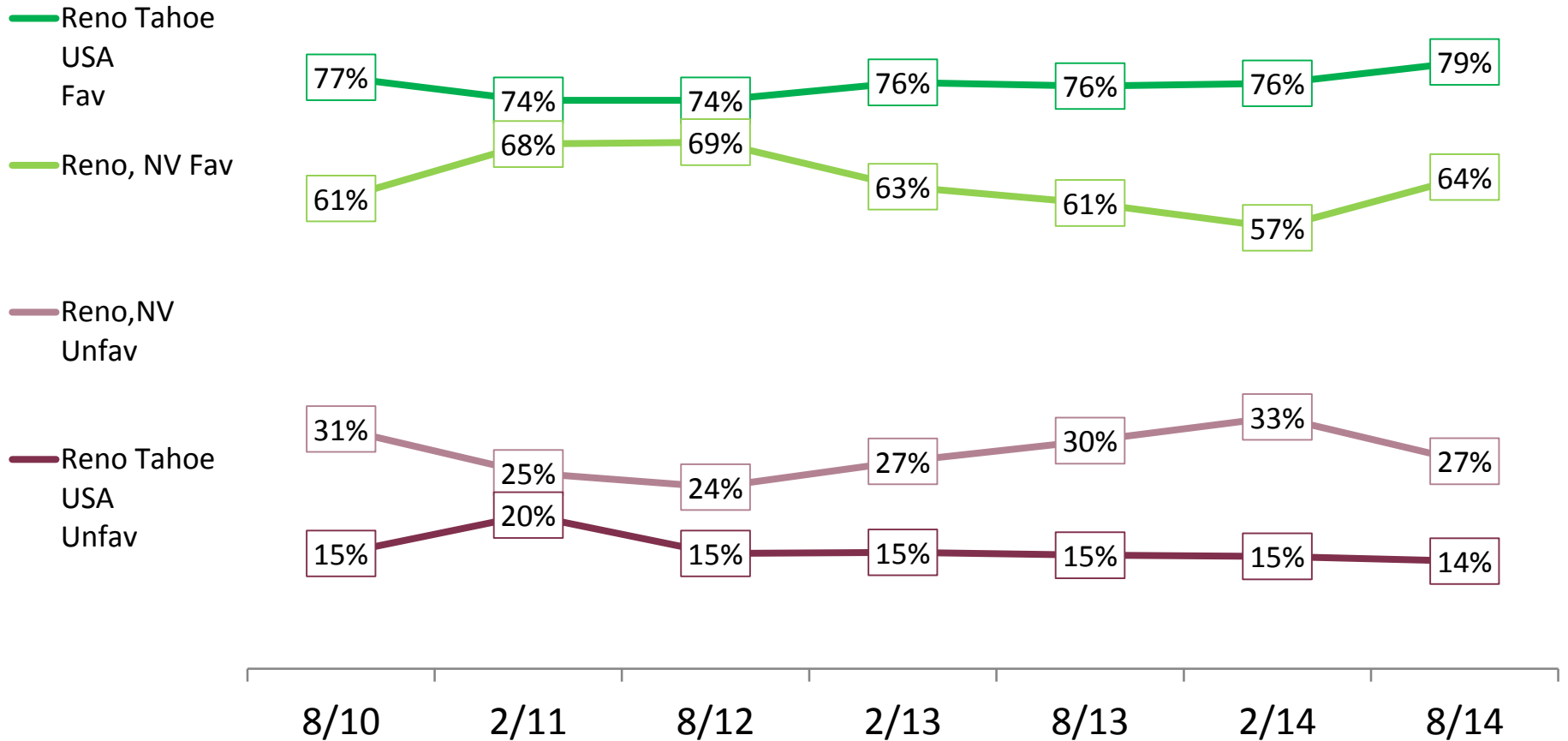
Radio is continuing its downward trend, and there has been little change in other traditional media sources.



And where have you heard or read about Reno lately? (Q10) (*'If heard' n=459*)

Reno, NV and Reno Tahoe USA Brand Ratings Over Time

The Reno, NV brand is more volatile compared to the Reno Tahoe USA brand.



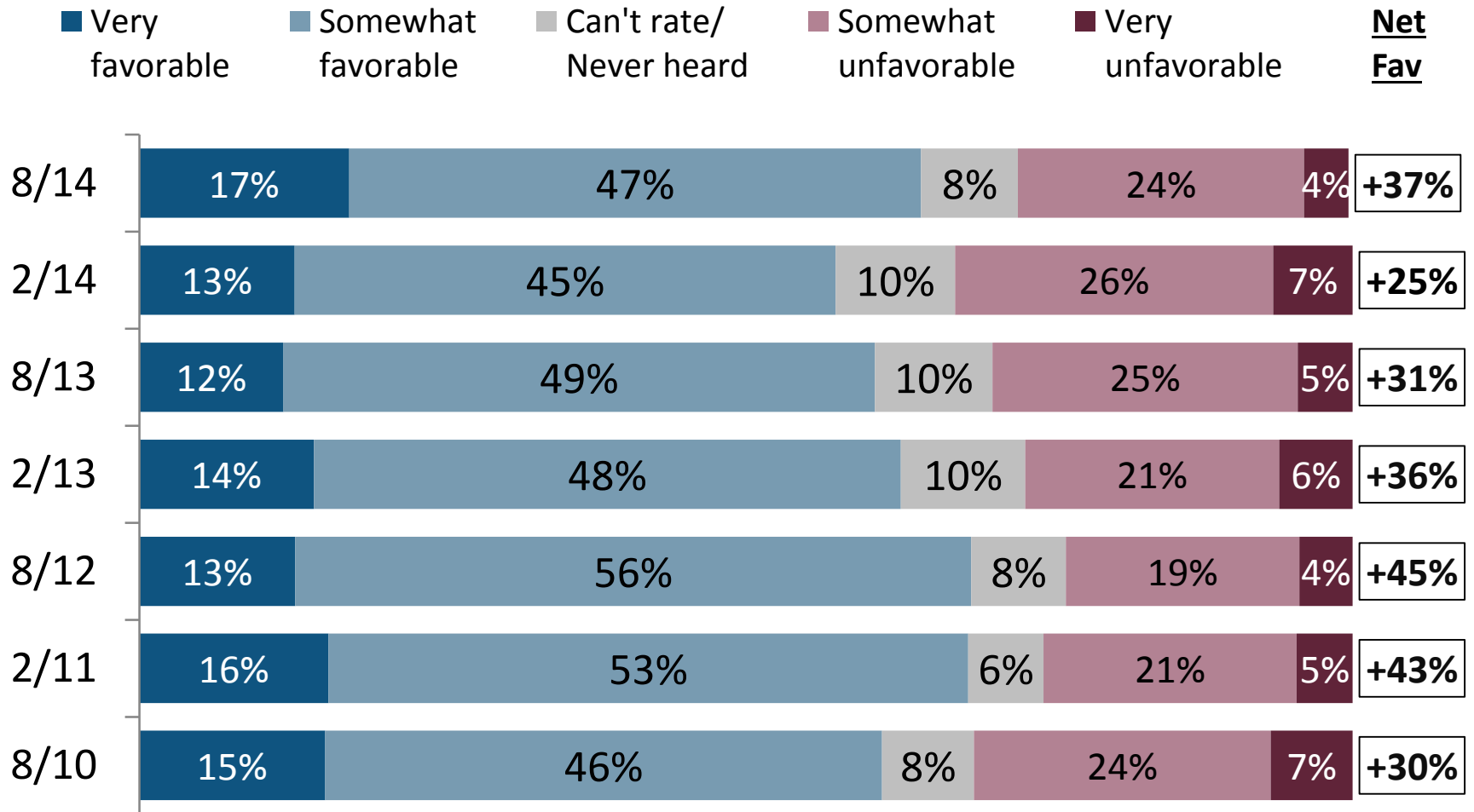
Please rate your opinion of **Reno, NV** (Q6)

Please rate your opinion of **Reno Tahoe USA** (Q7)



Reno, NV Brand Rating Over Time

Reno's brand rating in the Bay Area has halted its downward trend.



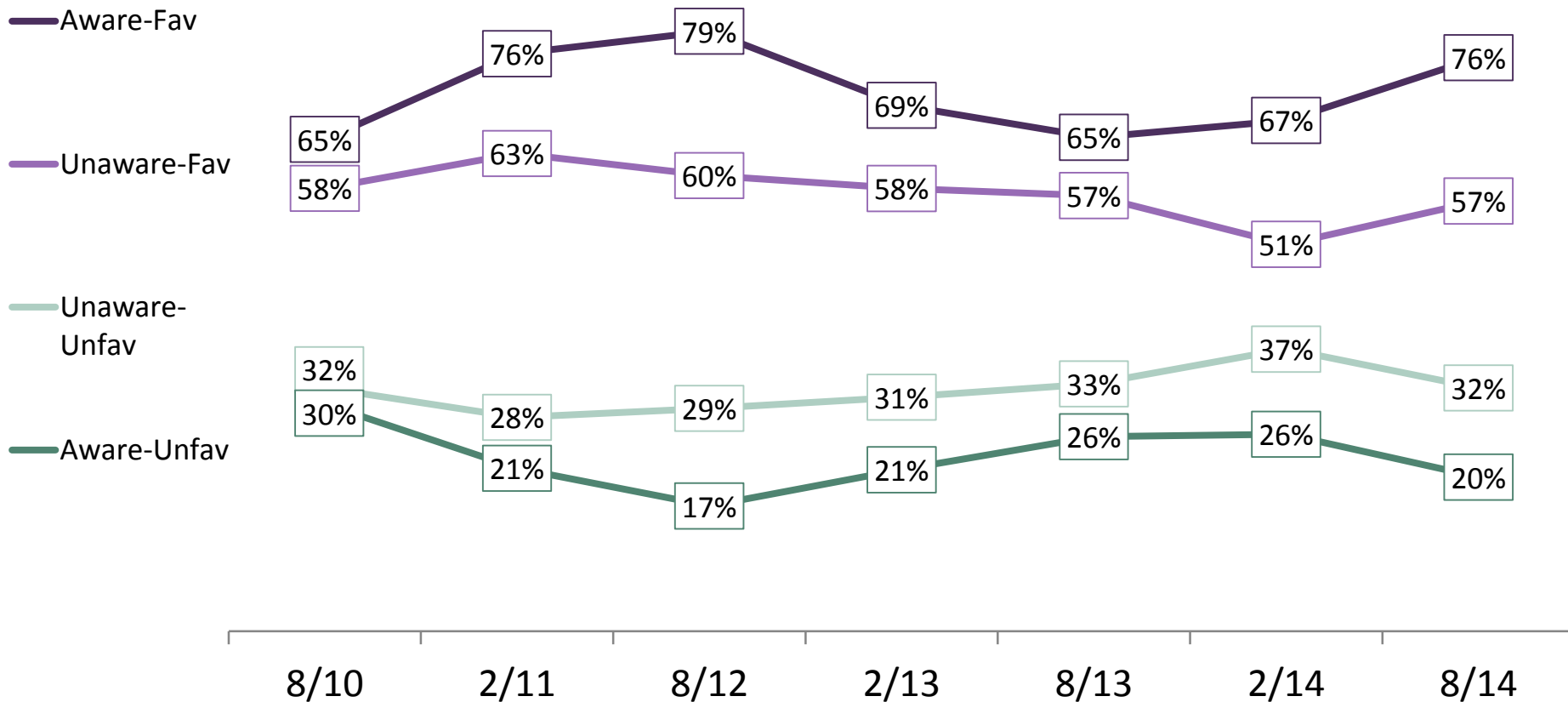
Please rate your opinion of **Reno, NV** (Q6)

Net Favorable refers to the difference between the total Favorable and total Unfavorable rating.



Reno, NV Brand Rating by Awareness

Reno's brand continues to be stronger among people who have heard something about Reno recently.

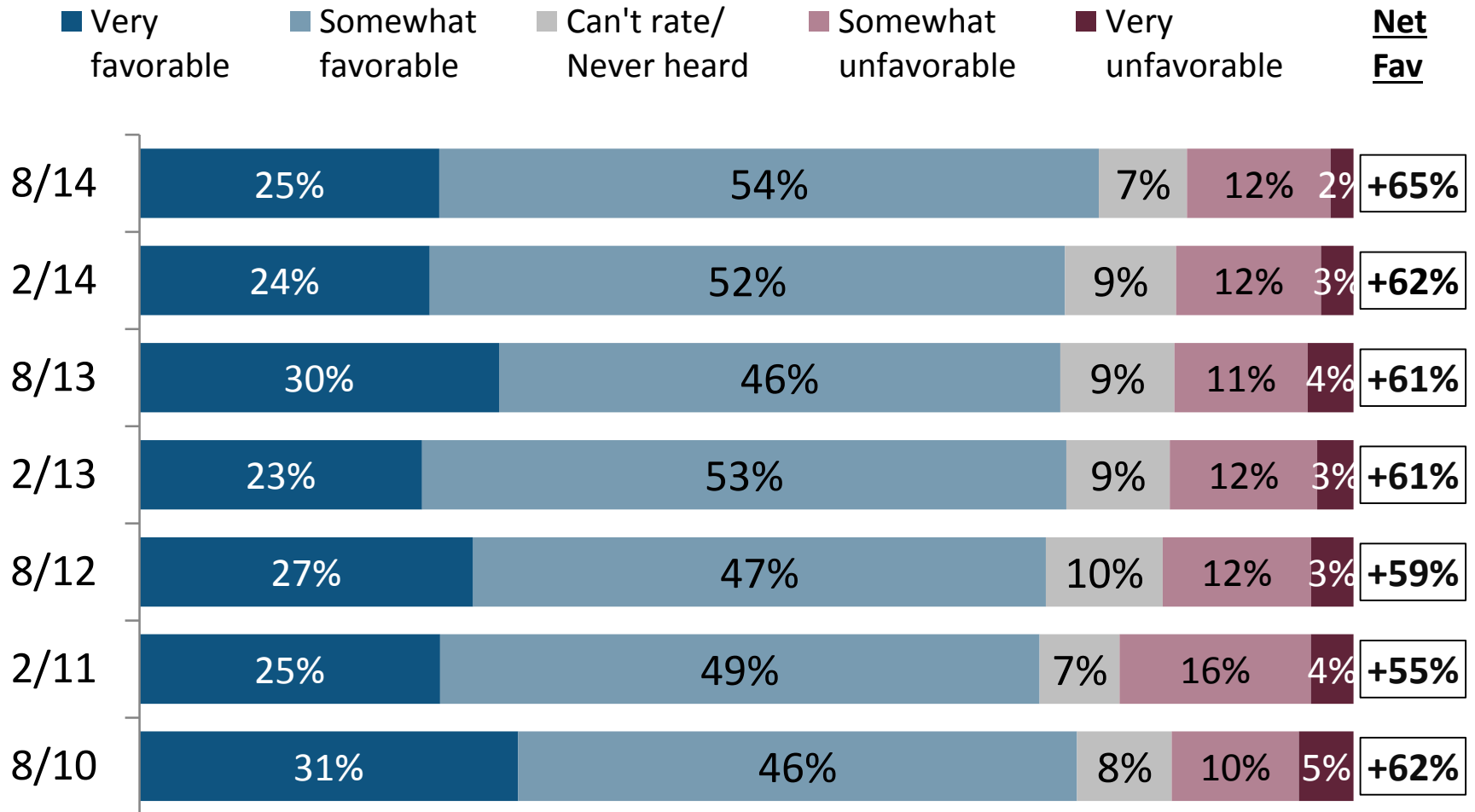


Please rate your opinion of **Reno, NV** (Q6)
Have you heard or read anything lately about Reno? (Q8)



Reno Tahoe USA Rating Over Time

Reno Tahoe USA's brand remains consistently strong.



Please rate your opinion of **Reno Tahoe USA** (Q7)

Net Favorable refers to the difference between the total Favorable and total Unfavorable rating.

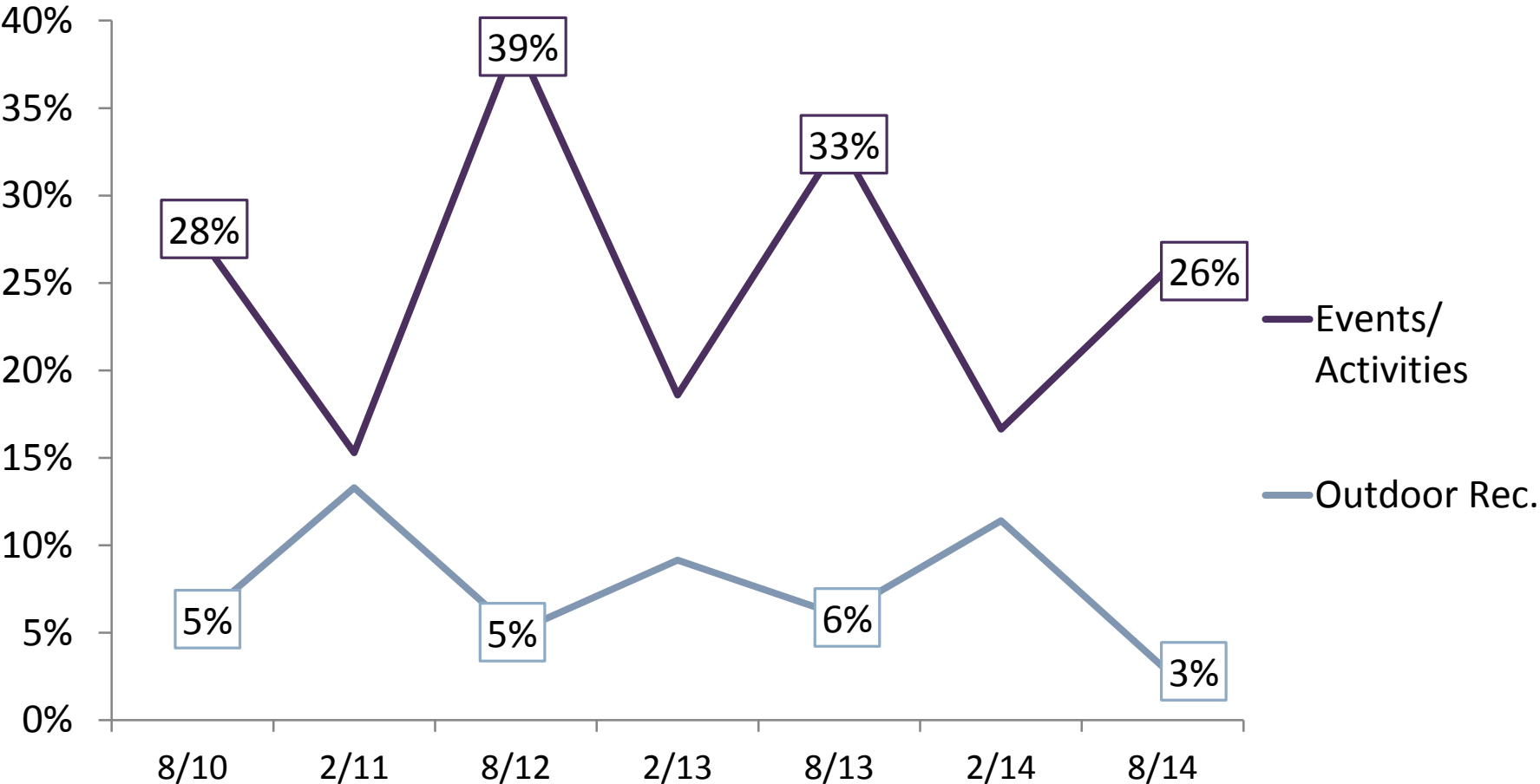




Reno Brand Attributes

Top of Mind Mentions Over Time

Event/activity mentions continue to jump in the summer.

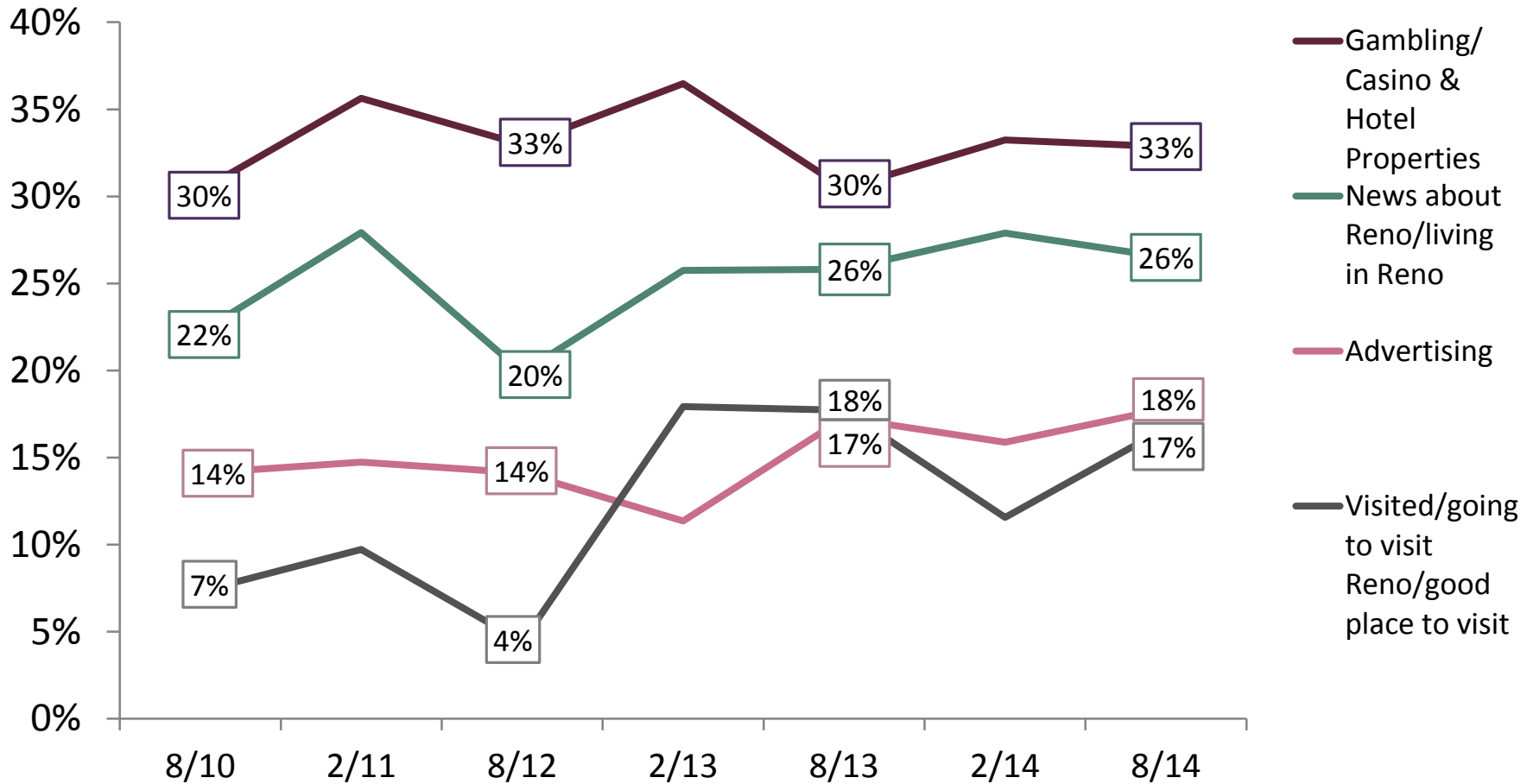


What have you heard or read about Reno lately? (Q9)
IF HEARD (n=459)



Top of Mind Mentions Over Time, Continued

Mentions of Reno as a place to visit have been gradually trending upwards over the last 4 years.



What have you heard or read about Reno lately? (Q9)

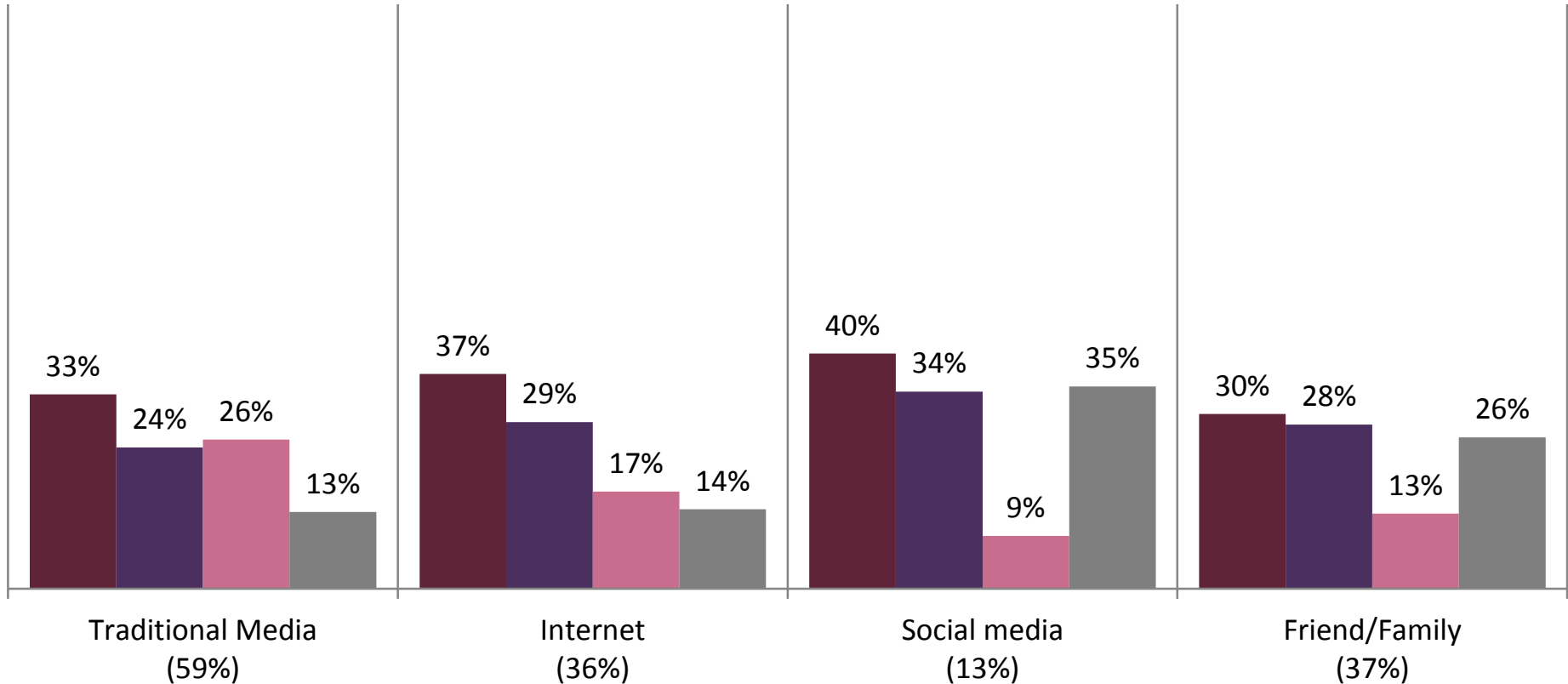
IF HEARD (n=459)



Top of Mind Mentions by Information Source

People who heard something about Reno through social media are most likely to mention events/activities and that Reno is a good getaway.

■ Gambling/Casino & Hotel Properties
 ■ Events/Activities
 ■ Advertising
 ■ Visited/going to visit Reno/ good place to visit



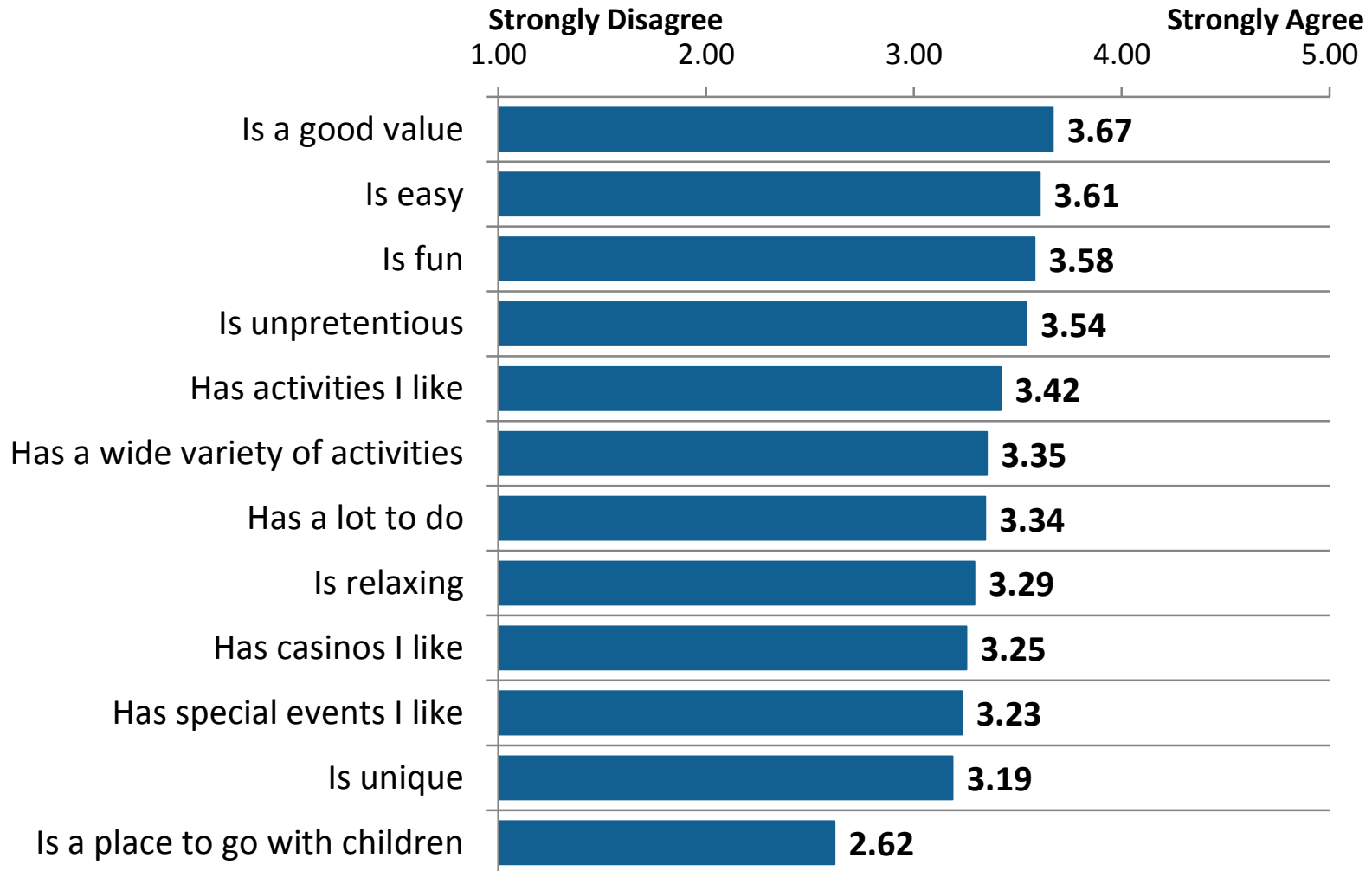
What have you heard or read about Reno lately? (Q9)

IF HEARD (n=459)



Reno Brand Attributes

Reno is a good value that is easy, fun, and unpretentious.



Rate your agreement with the following statements: Reno... (Q12-23)



Reno Brand Attributes by Information Source

Reno's attribute ratings are highest among people who heard about Reno on social media.

■ Traditional Media (59%)
 ■ Internet (36%)
 ■ Social Media (13%)
 ■ Friends/Family (37%)

Strongly Disagree Strongly Agree
 1.00 2.00 3.00 4.00 5.00



Rate your agreement with the following statements: Reno... (Q12-23)

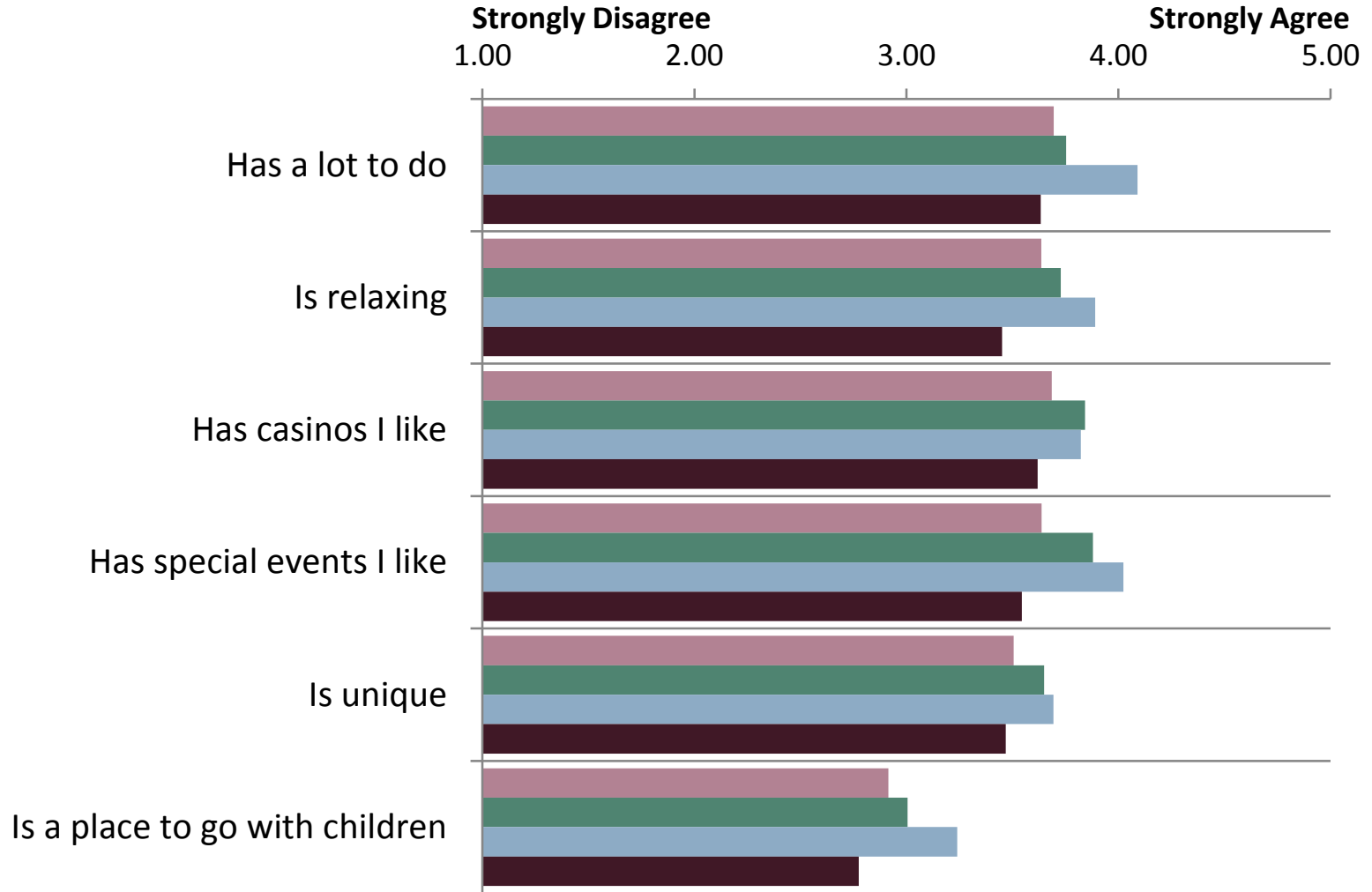
IF HEARD (n=459)



Reno Brand Attributes by Information Source, Cont.

Reno's attribute ratings are highest among people who heard about Reno on social media.

■ Traditional Media (59%)
 ■ Internet (36%)
 ■ Social Media (13%)
 ■ Friends/Family (37%)



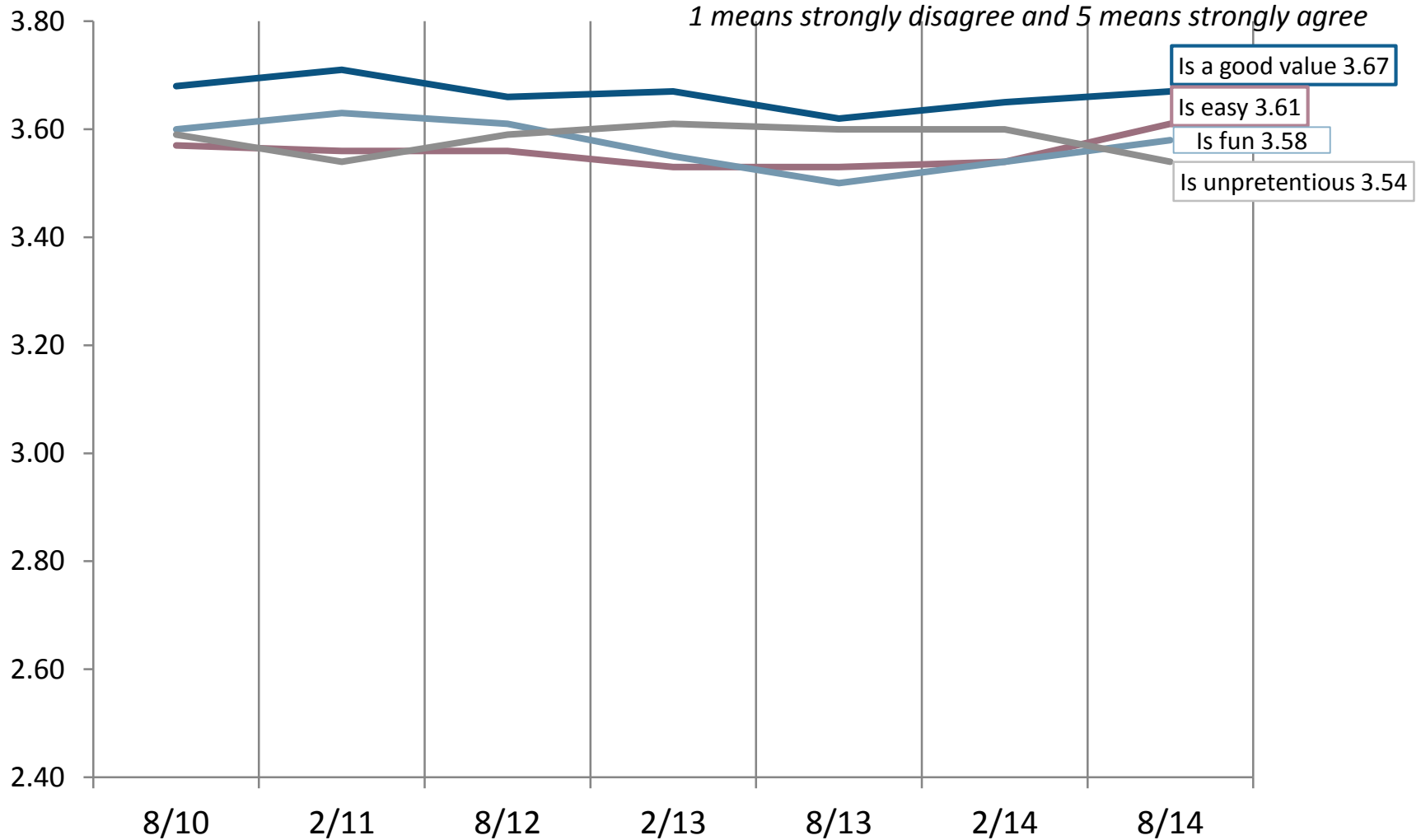
Rate your agreement with the following statements: Reno... (Q12-23)

IF HEARD (n=459)



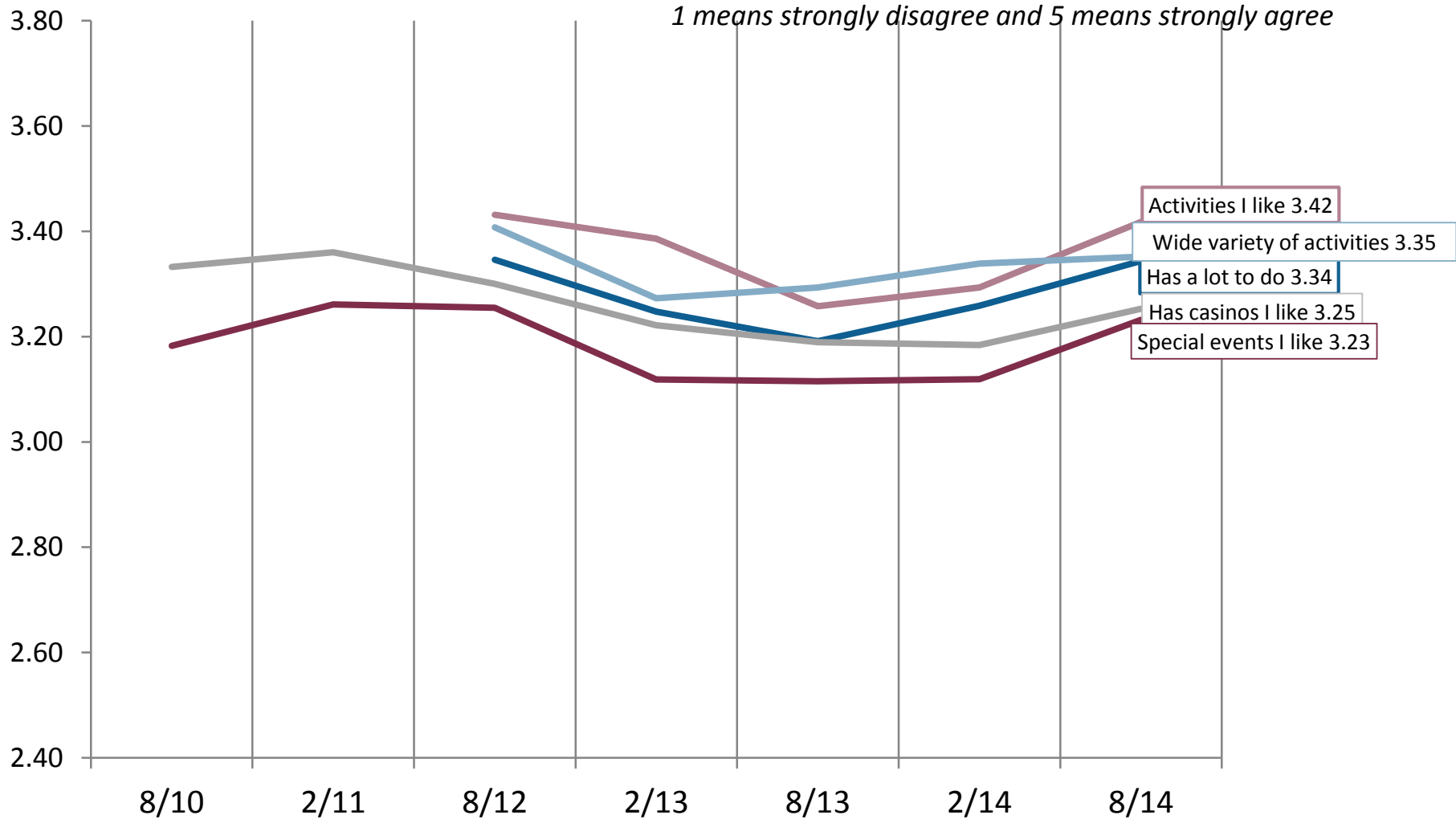
Reno Brand Attributes Over Time

Reno's top attributes remain consistent.



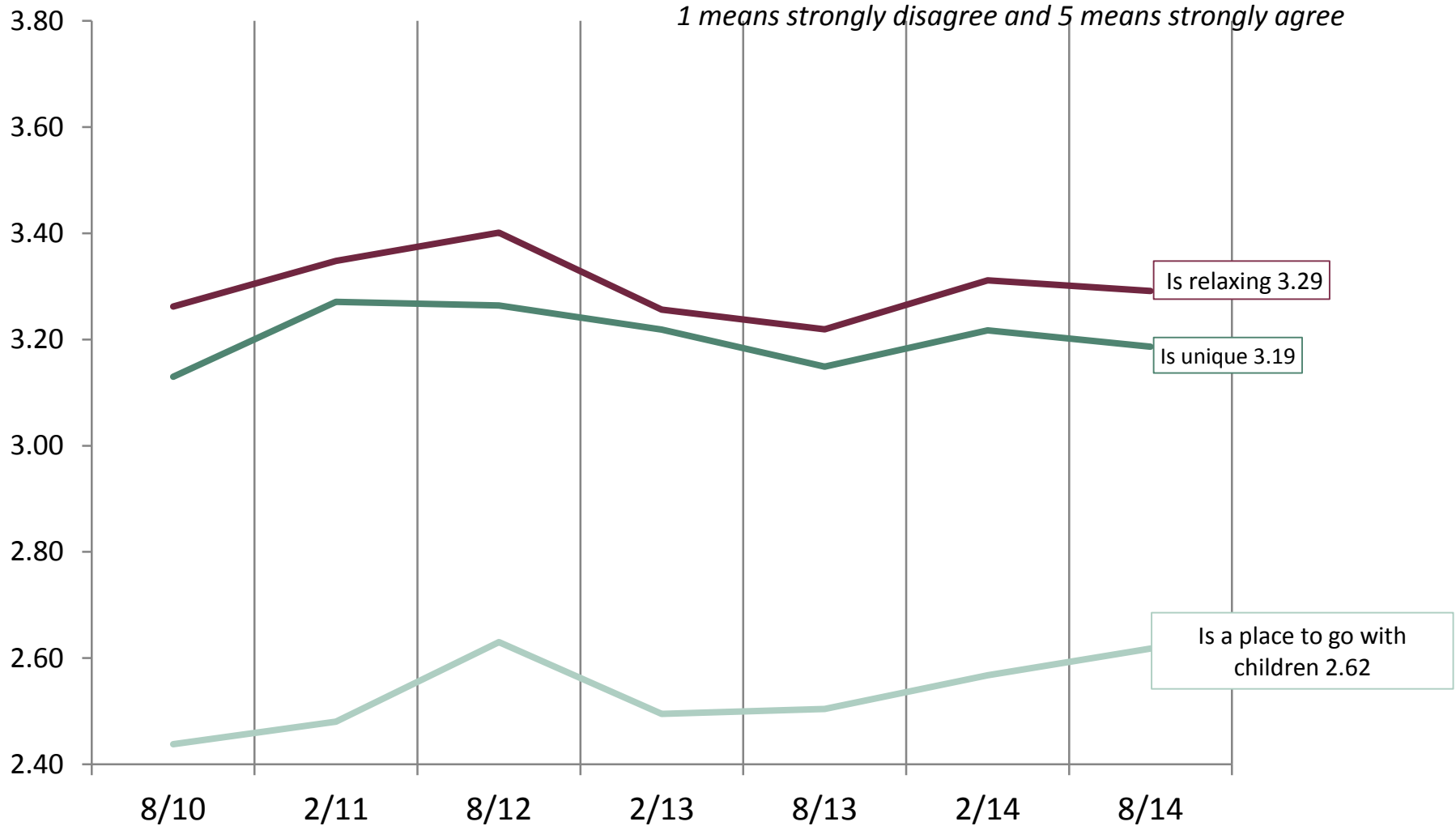
Reno Brand Attributes Over Time, Continued

Attributes about activities are on the rise.



Reno Brand Attributes Over Time, Continued

"Is a place to go with children" is gradually trending upwards.

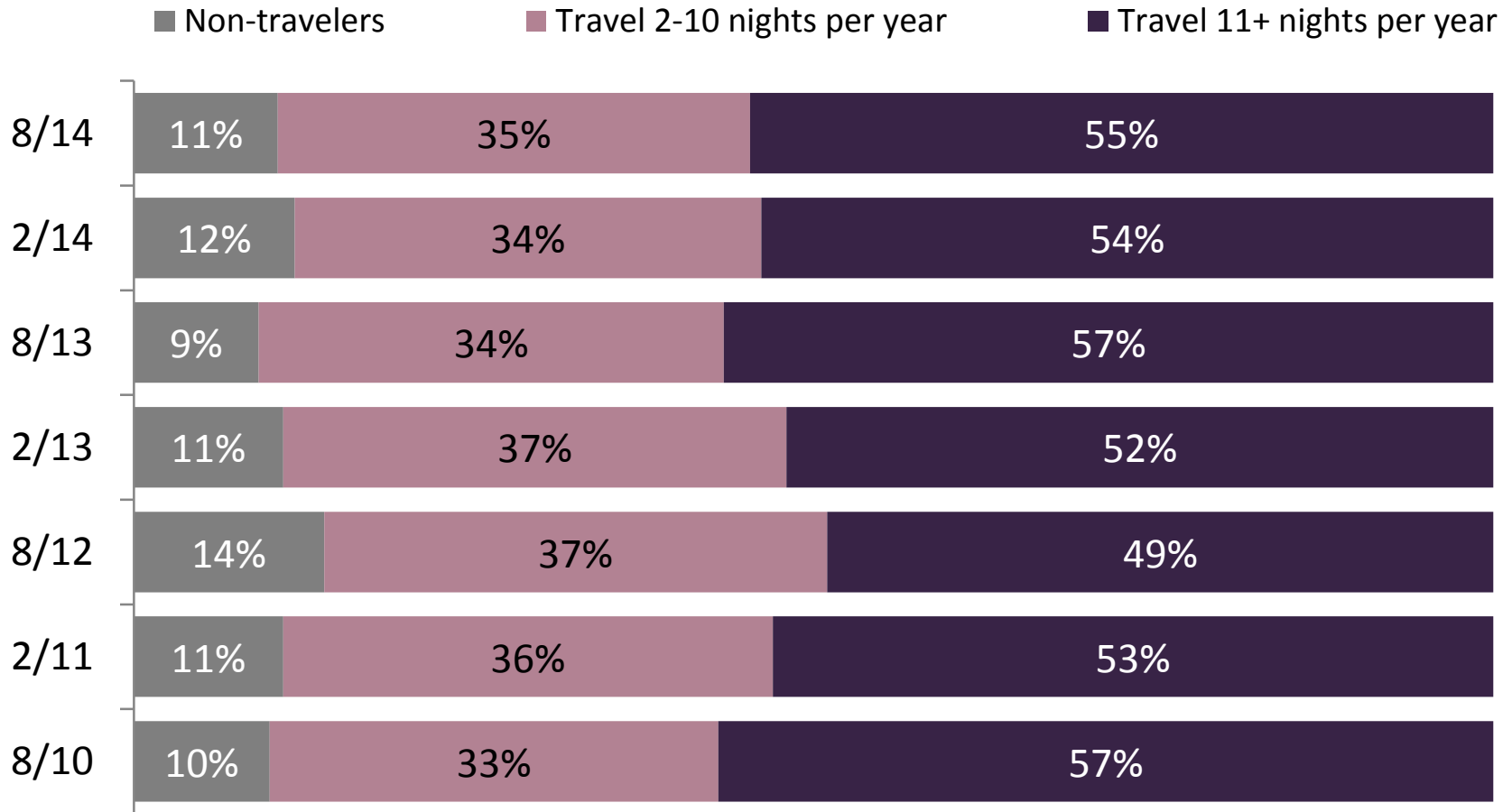




Travel Patterns & Desire to Visit

Self-Reported Personal Travel - Total Travel Days

Most Bay Area residents report traveling at least two nights for leisure in the last year.



About how many nights did you spend away from home on personal (non-business) travel in the last 12 months? (Q29)

Top of Mind Getaway Destinations

Reno is ninth on the list of top of mind getaway destinations, up from 11th.

Rank		<u>8/10</u>	<u>2/11</u>	<u>8/12</u>	<u>2/13</u>	<u>8/13</u>	<u>2/14</u>	<u>8/14</u>
1	Lake Tahoe	27%	29%	23%	24%	25%	24%	25%
2	Las Vegas	20%	19%	20%	21%	18%	18%	21%
3	Monterey	20%	18%	15%	17%	17%	15%	18%
4	Los Angeles	10%	11%	12%	16%	14%	14%	17%
5	Napa/Napa Valley	19%	15%	15%	15%	16%	16%	16%
6	California coast/ California coastal cities	11%	8%	6%	6%	11%	11%	14%
7	San Francisco	10%	11%	10%	8%	9%	9%	12%
8	San Diego	9%	6%	8%	9%	10%	10%	12%
9	Reno*	8% (12 th)	8% (10 th)	8% (8 th)	8% (8 th)	8% (11 th)	7% (11 th)	11% (9 th)
10	Hawaii	12%	11%	10%	12%	11%	13%	9%

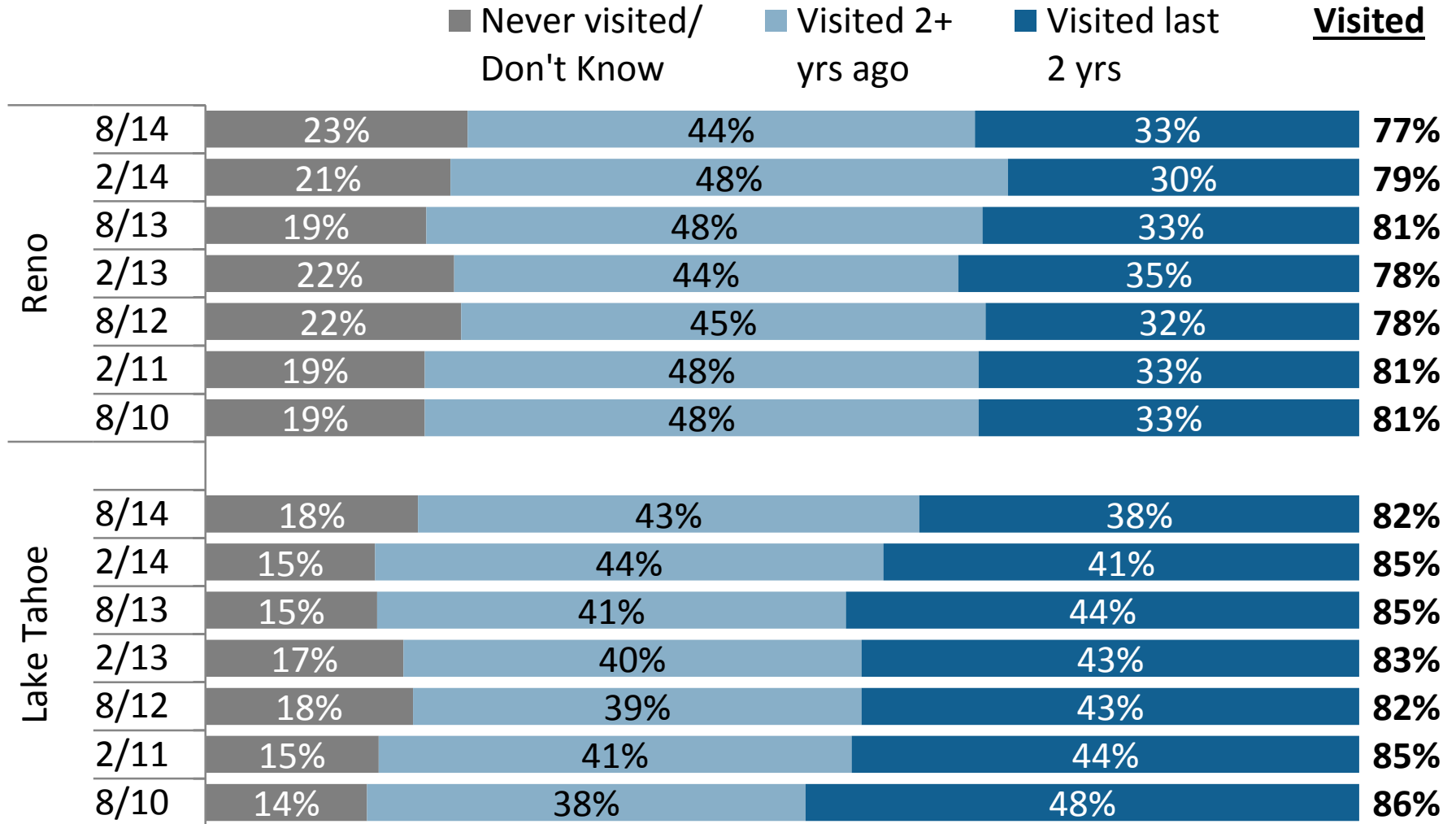
*Ranking in parentheses

*When you think about getaways or short trips, what places come to mind?
(Q5) (Most frequently mentioned. All responses included)*



Reno & Tahoe Visits

About a third have been to Reno in the last two years. While Lake Tahoe maintains higher visitation than Reno, recent Lake Tahoe visitation has declined.



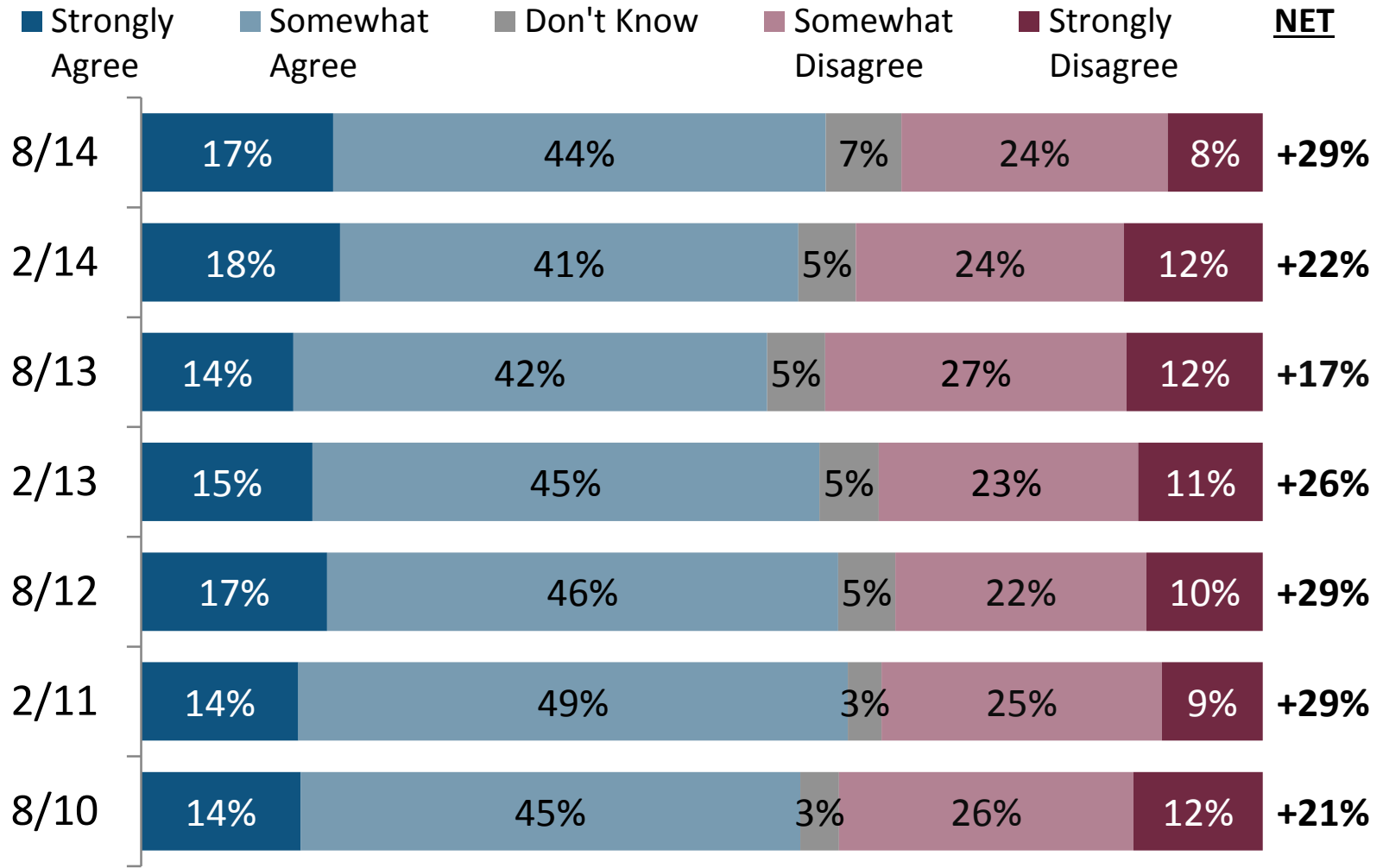
Have you visited Lake Tahoe as an adult? (Q24)

Have you visited Reno as an adult? (Q25)



Desire to Visit Attribute Over Time

Desire to visit Reno is showing a sustained increase since last summer.

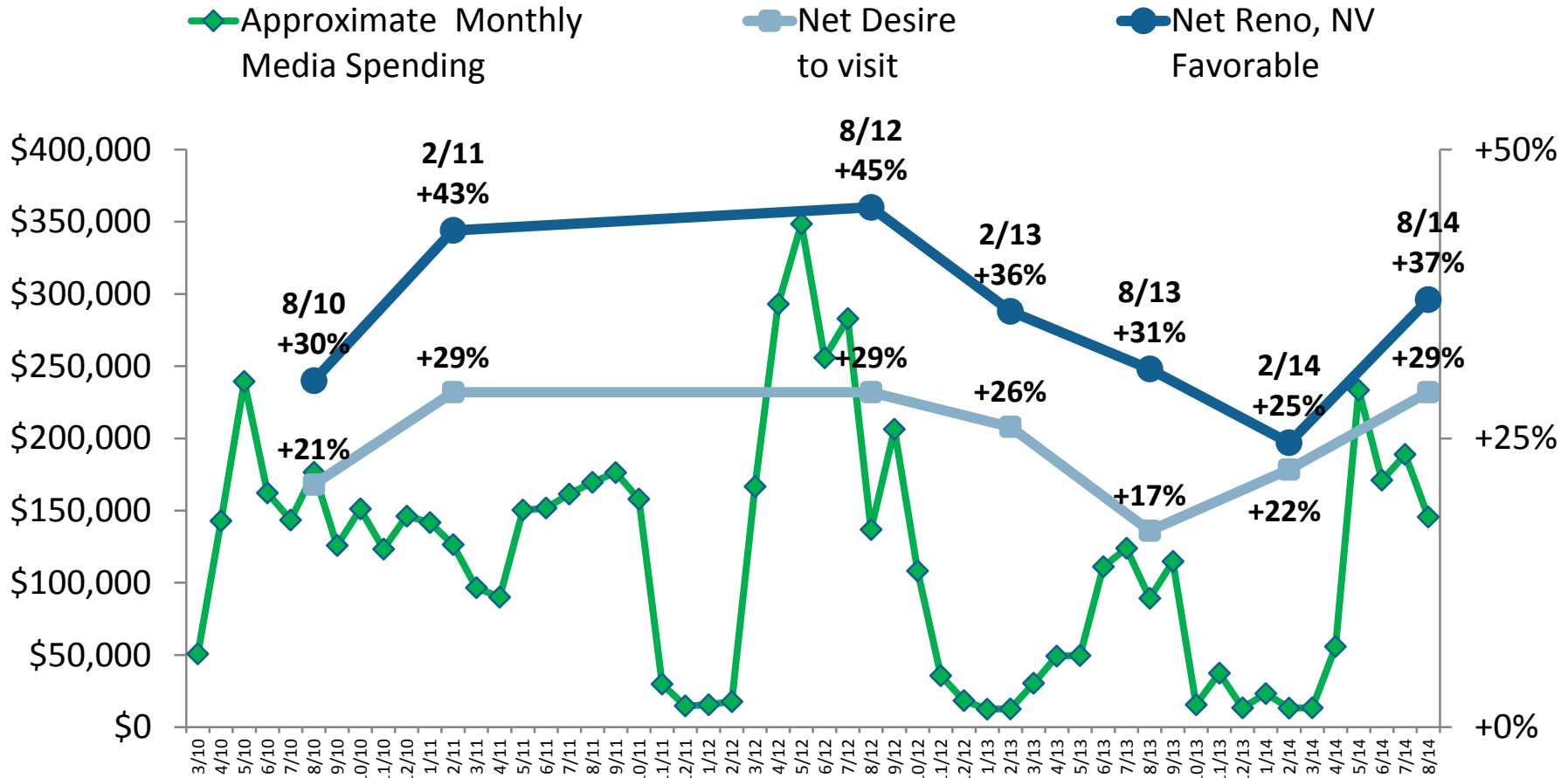


Do you agree or disagree: Reno is a place I want to visit? (Q11)



Media Spending vs. Net Favorable and Net Desire to Visit

Spending works: brand rating and desire to visit go up when advertising spending increases.



Monthly media spending information provided by the RSCVA

Net Desire to visit refers to the difference between the total percentage that agree and the total percentage that disagree that they want to visit Reno.

Net Favorable refers to the difference between the total Favorable and total Unfavorable rating.





Segmentation

Target Segmentation Definition

Segment V: **Other**

Segment IV: **First-Timers**

- *Strongly* agrees that Reno is a place they want to visit
- Never visited Reno as an adult

Segment III: **Needs Reintroduction**

- *Somewhat* agrees that Reno is a place they want to visit
- Visited Reno more than two years ago

Segment II: **Just get them in the door**

- *Strongly* agrees that Reno is a place they want to visit
- Visited Reno more than two years ago

Segment I: **Core Visitors**

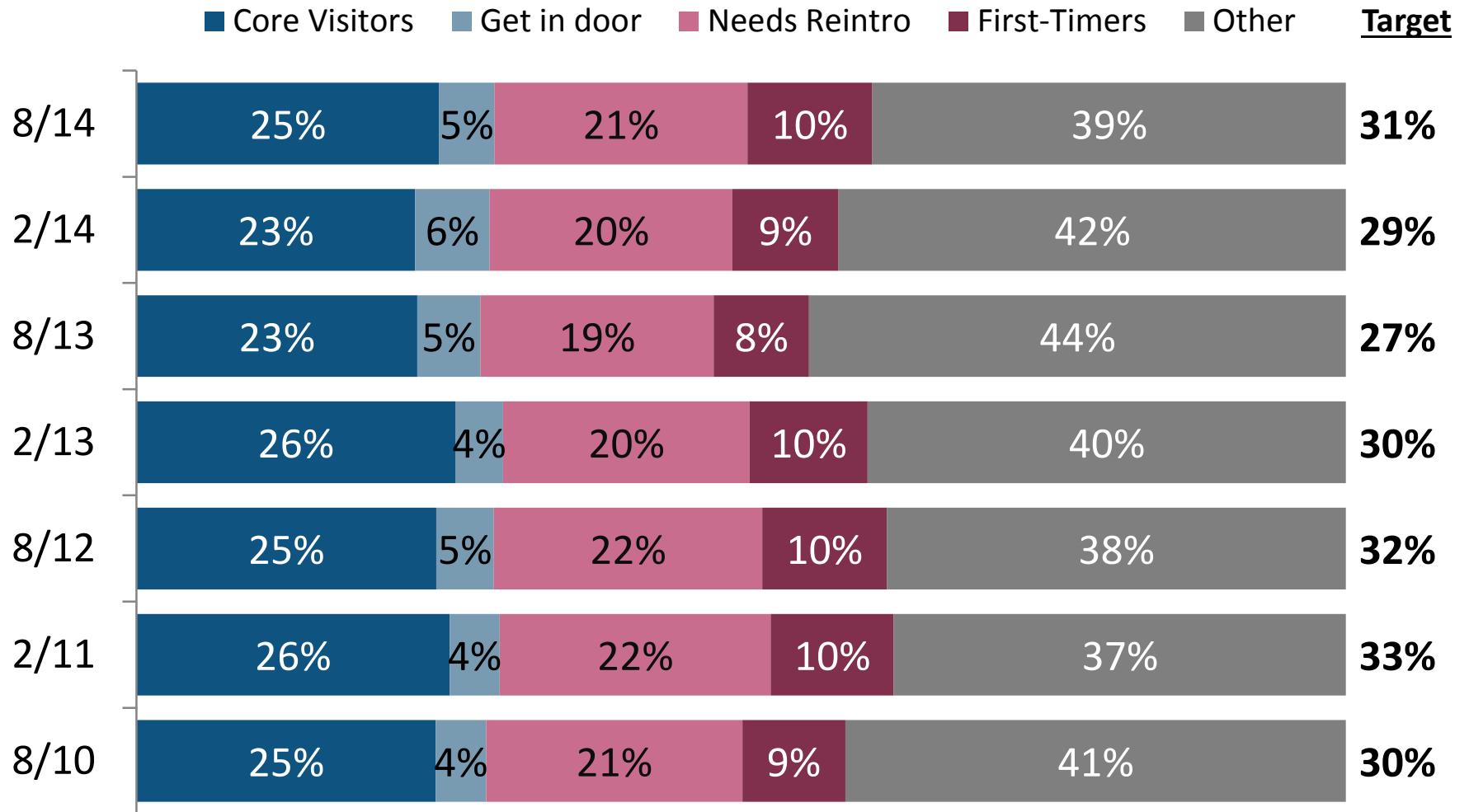
- Agreed that Reno is a place they want to visit
- Has visited Reno in the last 2 years



**Target
Segments
(III-IV)**

Target Segmentation Over Time

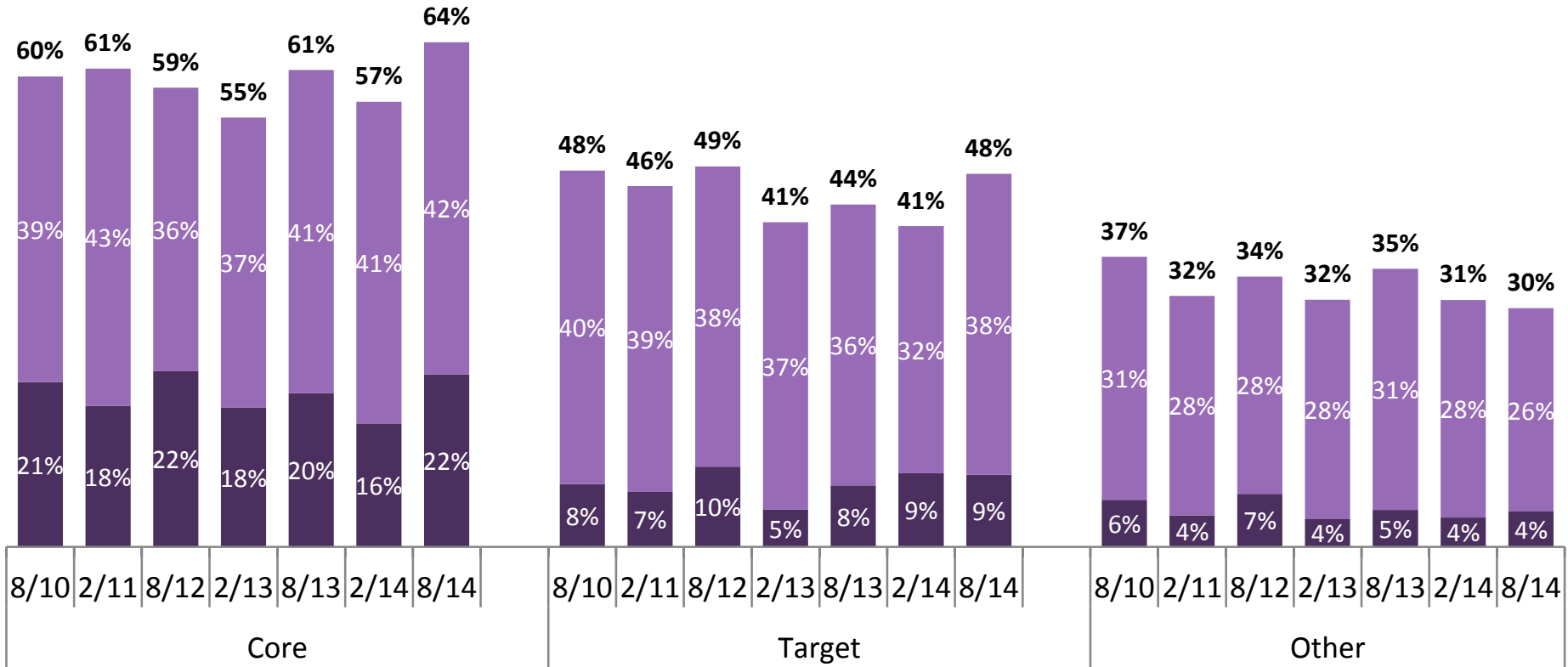
The size of the target has been growing after reaching its lowest level last year.



Awareness By Target Segment

Advertising appears to be targeted effectively; awareness in increasing among core and target audiences.

■ Yes, heard a lot ■ Yes, heard a little



Have you heard or read anything lately about Reno? (Q8)



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