2006 RENO-SPARKS VISITOR PROFILE STUDY

PREPARED FOR
RENO-SPARKS CONVENTION & VISITOR AUTHORITY

Study Conducted and Reported by

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EXECUTIVE SUMMARY

PURPOSE

The objective of the Reno-Sparks Visitor Profile Study is to determine the origin, methods of travel, visitation patterns, types of lodging, perceptions, spending budgets, lifestyle activities, intent to return, and demographics of adult visitors to the Reno-Sparks area. The surveys are conducted on an ongoing basis and the data is summarized quarterly to identify patterns and trends over time. The annual report documents visitor profile trends over the past five years.

METHODOLOGY

The objective of the Reno-Sparks Visitor Profile Study is to determine the origin, methods of travel, visitation patterns, type of lodging, perceptions, spending budgets, lifestyle activities, intent to return, and demographics of adult visitors to the Reno-Sparks area. The surveys are conducted on an ongoing basis and the data is summarized quarterly to identify patterns and trends over time. The annual report documents visitor profile trends over the past five years.

In 2006, InfoSearch International, a Reno based market research company, conducted 2,396 telephone interviews of individuals who visited the Reno-Sparks area and lived at least 100 miles away.

Potential respondents were intercepted at area hotel-casinos and asked if they would participate in a survey after their visit to the Reno-Sparks area; these visitors were then interviewed on the telephone after they returned home.

SUMMARY OF FINDINGS

Number of Visitors and Size of Traveling Party:

It is estimated that 5,180,692 people visited the area in 2006, slightly down from 5,266,405 in 2005. The percentage of visitors who traveled alone decreased from 18% in 2005 to 14% in 2006; at the same time, the percentage of visitors in parties with three or more adults remained about 34%. Consistent over the past three years, about 13% of visiting parties traveled with children under the age of 21.

Market Origin and Method of Travel:

In 2006, California continued to be the major feeder market to the Reno-Sparks area, accounting for 46% of visitors, down from 51% in 2005. Another 15% of visitors reside in Washington and Oregon. Canada continued to grow as a feeder market, accounting for 7% of visitors in 2006, up from 4% in 2003. Three out of five visitors (57%) traveled by personal vehicle to the area, down from 60% last year, consistent with the drop in percentage of visitors from neighboring California.

Visitation and Lodging:

In 2006, one out of five (20%) respondents were first-time visitors (a first-time visitor is defined as someone who has not visited the area within 5 years); 80% were repeat visitors. Nearly all visitors (97%) stayed overnight; the percentage of day visitors (from 100 or more miles away) remained stable at 3%. The mean number of nights overnight visitors spent in Reno-Sparks was 3.3, up slightly from 3.2 in 2005. In general, visitors who stayed less than 3 nights were more likely to return within 12 months. The primary method of making reservations was through either the hotel or motel's direct reservation service (39%) or via internet (23%); only 4% used a travel agent. The average lead time for reservations was about one month (32 days). Overall, 22% of guests received complimentary rooms in 2006, up from 18% in 2005.

Visitor Activities:

The main reason given for visiting the Reno-Sparks area, in 2006, was for a getaway/vacation, cited by 32% of visitors. Visitors with higher household incomes were more likely to visit primarily for business than were those with lower household incomes; conversely, visitors with lower household incomes were more likely to visit primarily for friends and family than were those with household incomes of $100,000 or more. Although only 14% visited <u>primarily</u> for gaming; 91% indicated gaming while they were there. Visitors also enjoyed shopping (55%), sightseeing (40%) and attending a live show (34%). Overall, 20% of visitors to the Reno-Sparks area visited Lake Tahoe;

34% of first-time visitors went to Lake Tahoe, compared to just 15% of repeat visitors. Reno-Sparks visitors with high household incomes ($100,000 or higher) were more likely to visit Tahoe during their visit. Additionally, Nevadans were more likely to visit Lake Tahoe while in Reno-Sparks than were visitors from other key markets.

Visitor Spending:

Trip spending increased in 2006 compared to 2005. The per capita spending budget for the trip was $1,058 in 2006, up from $1000 in 2005 and $955 in 2004. In 2006, about 55% (or $584) of the trip budget was for gaming, 13% for food and drinks, 13% for lodging, 12% for gifts/shopping, and 6% for entertainment, sightseeing, recreation, and special events (combined).

Convention Attendance:

In 2006, convention attendance was at 18%, up from 15% last year and the same attendance percentage experienced in 2004. About 82% of conventioneers indicated gaming while in Reno-Sparks, compared to 91% of all respondents; the conventioneers who did do some gaming had a much lower gaming budget ($499 per trip and $151 per day) than average ($584 per trip and $215 per day). Visitors with high household incomes ($100,000 or higher) were more likely to attend a convention while visiting Reno-Sparks than were visitors with household incomes less than $100,000.

Gaming Destinations:

In 2006, visitors made an average of 3.8 trips to the Reno-Sparks area in the last 12 months. Seven out of ten respondents (72%) reported visiting at least one other gaming destination other than Reno-Sparks in the 12 months preceding their visit to Reno-Sparks. A total of 38% of all gaming trips made by visitors were to the Reno-Sparks area and another 16% were to Indian Casinos (in California and other states); about 11% of gaming trips made by the Reno-Sparks visitors were to Las Vegas. The top three Indian Casinos visited most often by Reno-Sparks visitors were all in the nearby northern California area: Thunder Valley, Cache Creek, and Jackson Rancheria.

Media Use and Marketing:

Nearly four out of five (79%) visitors had internet access in 2006. The majority of internet users (91%), 72% of all respondents, had personal email addresses. Also, about 35% of internet users, 27% of all respondents, had visited www.VisitRenoTahoe.com; of whom three out of four (77%) discovered the website through search engines, such as Google, Yahoo, or MSN. About one out of sixteen (6%) respondents expressed interest in receiving updates and information from the RSCVA through text messaging on cell phones. One out of seven (15%) visitors said they were familiar with the Reno-Tahoe slogan, of whom 1% recognized the slogan as "America's Adventure Place."

Visitor Satisfaction:

On a five-point scale, 45% of visitors rated their overall trip enjoyment as a "5" (excellent) and 39% rated it as a "4" in 2006. Half (52%) of returning visitors said the Reno-Sparks area had improved, 25% reported it had remained the same, 14% indicated the area had declined, and 9% didn't know. Repeat visitors who rated their level of enjoyment a "4" or "5" were more likely to report the area had improved since they had been coming. About 77% of visitors reported that they were either definitely or very likely to return to the area within the next two years, down slightly from 80% last year. Visitors who rated their enjoyment level a "4" or "5" were more likely to definitely return than those who rated it a 1-3. The main reasons given for being unlikely to return to the area within two years were having other plans (13%), financial reasons (11%), no time (10%), too far (7%) and visiting only for business (7%).

Visitor Demographics:

In 2006, the median age of adult visitors to the Reno-Sparks area was 56 years, back to the median age found in 2003. Visitors younger than 40 were more likely to visit Reno-Sparks primarily for business than were older visitors. Nearly three out of four (72%) visitors were married. About 40% of visitors from the San Francisco Bay Area, as well as about half the visitors from Oregon (48%) and Canada (55%), were retired. The median family income was $69,200, up from last year's income of $64,600.

OVERVIEW OF FINDINGS

Highlights of the Visitor Profile Study – 5 Year Comparison

	2002	2003	2004	2005	2006
N=	2,558	2,645	2,405	2,367	2,369
RETURN TO AREA					
Intend to Return to Reno-Sparks	83%	76%	73%	80%	77%
(75%-100% Chance Within 2 Years)					
TRIP CHARACTERISTICS					
Day Visitors	4%	4%	3%	3%	3%
Overnight Visitors	96%	96%	97%	97%	97%
Visiting Primarily for Business	6%	9%	9%	9%	12%
Attended a Convention/Meeting	13%	15%	18%	15%	18%
First-Time Visitors	14%	22%	20%	21%	20%
Average Visits per Year (Exclude 1st Time Visitors)	4.8	5.0	4.1	4.8	4.4
Average Members in Party	3.3	3.0	3.2	2.9	3.1
Traveling with Persons Under 21	19%	13%	13%	13%	13%
Average Length of Stay (All)	2.4	3.0	3.1	3.1	3.2
Average Length of Stay (Overnight Visitors Only)	2.5	3.1	3.2	3.2	3.3
Visit Tahoe	20%	26%	22%	20%	19%
MODE OF TRAVEL					
Private Vehicle	70%	60%	55%	60%	57%
Air	21%	29%	35%	29%	32%
Bus	6%	8%	6%	8%	6%
RV	1%	1%	1%	1%	1%
Train	1%	1%	1%	2%	2%
DAILY BUDGET					
Gaming Budget (Daily)	$212	$210	$212	$227	$215
Non-Gaming Budget (Daily)	$131	$105	$126	$151	$151
Total	$343	$315	$338	$378	$366
GENDER OF RESPONDENTS					
Male	46%	44%	47%	45%	49%
Female	55%	53%	56%	54%	51%
AGE AND INCOME					
Median Age (Years)	54	56	55	57	56
Median Family Income (000)	$59.6	$63.6	$63.3	$64.6	$69.2
FAMILY/MARITAL STATUS					
Single	13%	11%	13%	13%	15%
Married	75%	75%	73%	75%	72%
Children at Home	39%	37%	36%	34%	36%
Children No Longer at Home	61%	63%	64%	66%	64%
RESIDENCE OF VISITORS					
California	59%	44%	43%	51%	46%
Washington	9%	7%	7%	8%	8%
Oregon	9%	7%	7%	8%	7%
Canada	4%	4%	6%	6%	7%
Nevada	2%	2%	3%	3%	2%
All Other States	19%	36%	34%	25%	30%
CALIFORNIA BREAKDOWN					
San Francisco Bay Area	27%	17%	16%	20%	18%
Central Valley	17%	13%	13%	16%	14%
Other Northern California	10%	9%	9%	9%	9%
Southern California	6%	5%	5%	6%	6%

Highlights of the Visitor Profile Study - Four-Year Comparison by Quarter

	2003				2004				2005				2006			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
N =	446	752	748	699	594	600	614	597	565	600	600	602	599	600	598	599
RETURN TO AREA																
Intend to Return to Reno-Sparks (75-100% Chance within 2 Years)	85%	69%	73%	81%	75%	62%	77%	80%	80%	75%	79%	84%	78%	77%	70%	82%
TRIP CHARACTERISTICS																
Day Visitors (100+ Miles Away)	0%	4%	4%	4%	3%	4%	4%	3%	0%	5%	3%	2%	2%	4%	3%	2%
Overnight Visitors (100+ Miles	100%	96%	96%	96%	97%	96%	96%	97%	97%	95%	97%	98%	98%	96%	97%	98%
Visiting Primarily for Business	15%	6%	6%	10%	12%	6%	5%	12%	10%	8%	7%	10%	12%	9%	11%	15%
Attended a Convention/Meeting	13%	5%	10%	8%	14%	7%	13%	7%	9%	7%	6%	5%	17%	18%	14%	22%
First-Time Visitors	13%	22%	29%	23%	21%	23%	17%	18%	20%	23%	22%	19%	20%	22%	21%	17%
Average Visits Per Year*	5.7	3.3	3.3	4.5	3.7	2.9	3.5	4.1	4.3	4.0	4.2	4.5	5.0	3.8	4.4	4.5
Average Members in Party	2.9	3.5	3.2	2.8	3.1	3.4	3.4	3.0	2.9	2.8	2.7	3.1	2.9	3.2	3.0	3.0
Traveling with Persons Under 21	14%	14%	15%	9%	11%	17%	12%	13%	13%	12%	13%	14%	13%	15%	10%	12%
Avg. Length of Stay (All)	2.7	3.1	3.2	3.0	3.4	3.1	2.9	3.1	3.1	3.1	3.2	2.9	3.2	3.3	3.1	3.2
Avg. Length of Stay (Overnight)	2.8	3.2	3.3	3.2	3.5	3.3	3.0	3.2	3.2	3.3	3.3	3.0	3.2	3.4	3.2	3.3
Visit Tahoe	23%	28%	33%	19%	20%	24%	24%	19%	14%	21%	25%	19%	16%	23%	22%	14%
MODE OF TRAVEL																
Private Vehicle	73%	57%	62%	49%	48%	54%	64%	55%	50%	62%	67%	62%	59%	63%	55%	53%
Air	23%	32%	29%	31%	40%	38%	28%	35%	36%	28%	24%	26%	29%	29%	33%	35%
Bus	1%	6%	6%	16%	7%	6%	3%	8%	10%	7%	4%	10%	7%	3%	7%	6%
RV	1%	3%	1%	1%	2%	1%	1%	0%	1%	1%	2%	0%	1%	1%	2%	2%
Train	1%	1%	0%	1%	3%	0%	0%	2%	4%	1%	0%	1%	2%	1%	1%	3%
DAILY BUDGET																
Gaming Budget (Daily)	$227	$195	$211	$210	$256	$192	$193	$209	$240	$236	$201	$231	$180	$224	$220	$236
Non-Gaming Budget (Daily)	$79	$82	$79	$64	$79	$101	$101	$100	$90	$104	$115	$111	$154	$170	$140	$139
Total	$306	$277	$290	$274	$336	$293	$294	$310	$330	$339	$316	$342	$334	$364	$360	$375
GENDER OF RESPONDENTS																
Male	56%	40%	37%	41%	47%	43%	46%	52%	48%	44%	42%	46%	54%	51%	42%	49%
Female	44%	60%	63%	59%	53%	56%	54%	48%	52%	56%	58%	54%	46%	49%	58%	51%
AGE AND INCOME																
Median Age (Years)	53	56	55	58	56	56	55	54	55	58	57	56	56	57	57	53
Median Family Income (000)	$71.1	$56.4	$61.1	$58.7	$62.2	$62.0	$66.1	$63.0	$65.3	$62.4	$65.0	$65.6	$71.8	$70.6	$68.2	$67.4
FAMILY/MARITAL STATUS																
Single	9%	12%	12%	13%	18%	14%	11%	10%	14%	11%	12%	14%	15%	13%	12%	15%
Married	73%	75%	75%	78%	65%	72%	77%	79%	74%	78%	73%	74%	72%	75%	73%	69%
Children at Home	31%	41%	37%	40%	36%	35%	36%	35%	36%	33%	29%	37%	35%	36%	35%	40%
Children No Longer at Home	69%	59%	63%	60%	64%	65%	64%	65%	64%	67%	71%	63%	65%	64%	65%	60%
RESIDENCE OF VISITORS																
California	52%	40%	42%	41%	34%	37%	54%	46%	49%	50%	51%	53%	47%	50%	40%	48%
Washington	3%	7%	7%	9%	7%	6%	9%	8%	8%	8%	9%	6%	8%	9%	7%	6%
Oregon	7%	8%	6%	7%	7%	6%	8%	5%	7%	8%	8%	7%	7%	6%	7%	8%
Canada	1%	3%	3%	8%	9%	6%	4%	4%	7%	5%	3%	8%	8%	4%	7%	8%
Nevada	3%	2%	2%	2%	3%	2%	3%	4%	3%	2%	2%	4%	4%	3%	1%	2%
All Others	33%	39%	40%	33%	40%	43%	23%	33%	27%	27%	27%	23%	26%	29%	38%	28%
CALIFORNIA BREAKDOWN																
San Francisco Bay Area	22%	16%	17%	13%	10%	14%	21%	17%	22%	18%	19%	19%	18%	20%	17%	19%
Central Valley	15%	13%	14%	13%	10%	10%	20%	12%	13%	17%	17%	17%	13%	16%	13%	13%
Other Northern California	11%	7%	7%	11%	11%	9%	8%	9%	11%	9%	9%	8%	10%	6%	6%	9%
Southern California	5%	5%	4%	4%	4%	5%	5%	5%	6%	6%	7%	6%	7%	7%	5%	7%

DETAILED FINDINGS

FIGURE 1: ESTIMATED NUMBER OF VISITORS

In 2006, it was estimated that more than 5 million people visited Washoe County, including Reno, Sparks, and northeast Lake Tahoe. Visitation was down about 1.6% from 2005, driven primarily by a decline in overnight commercial lodgers.

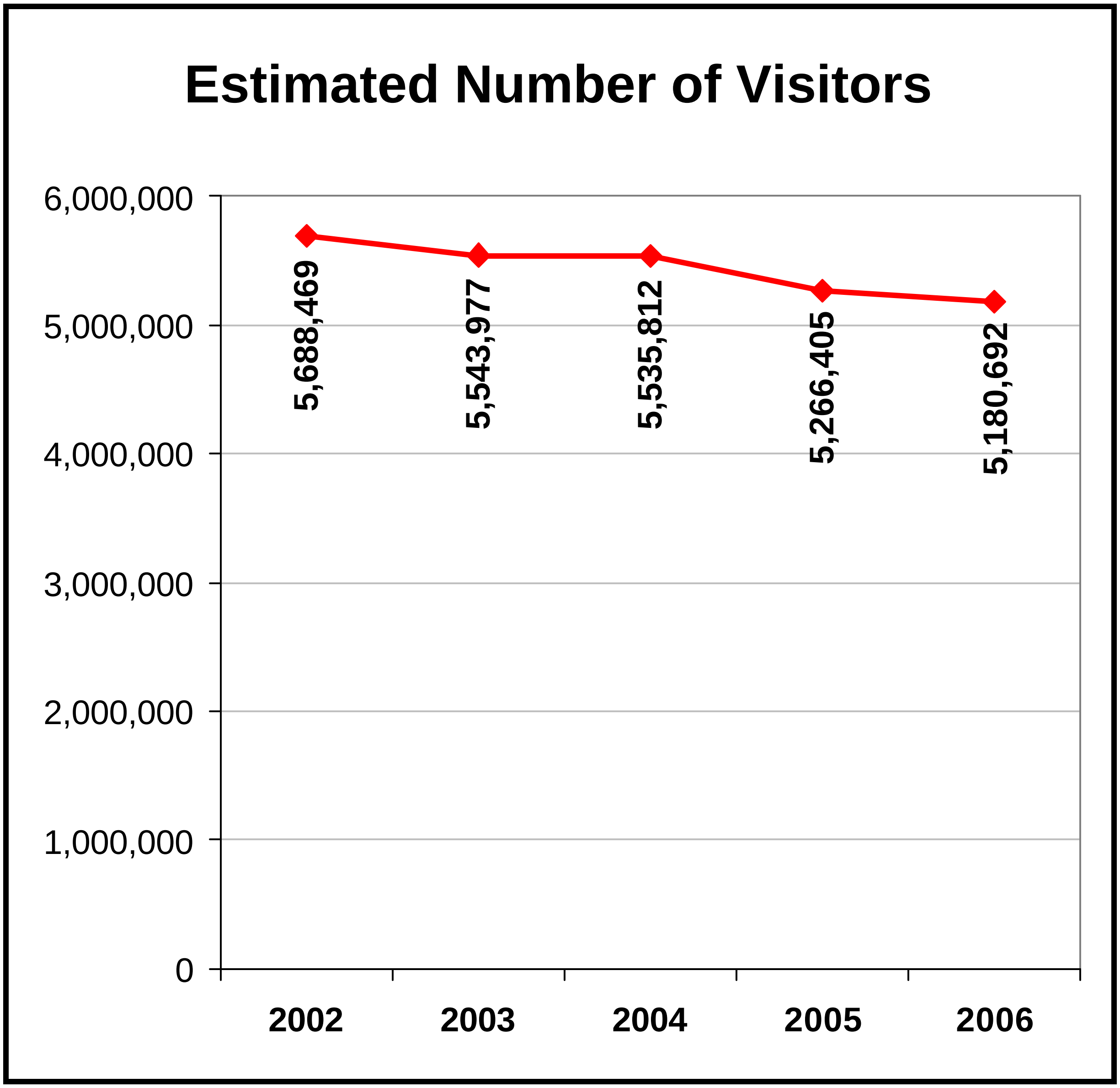
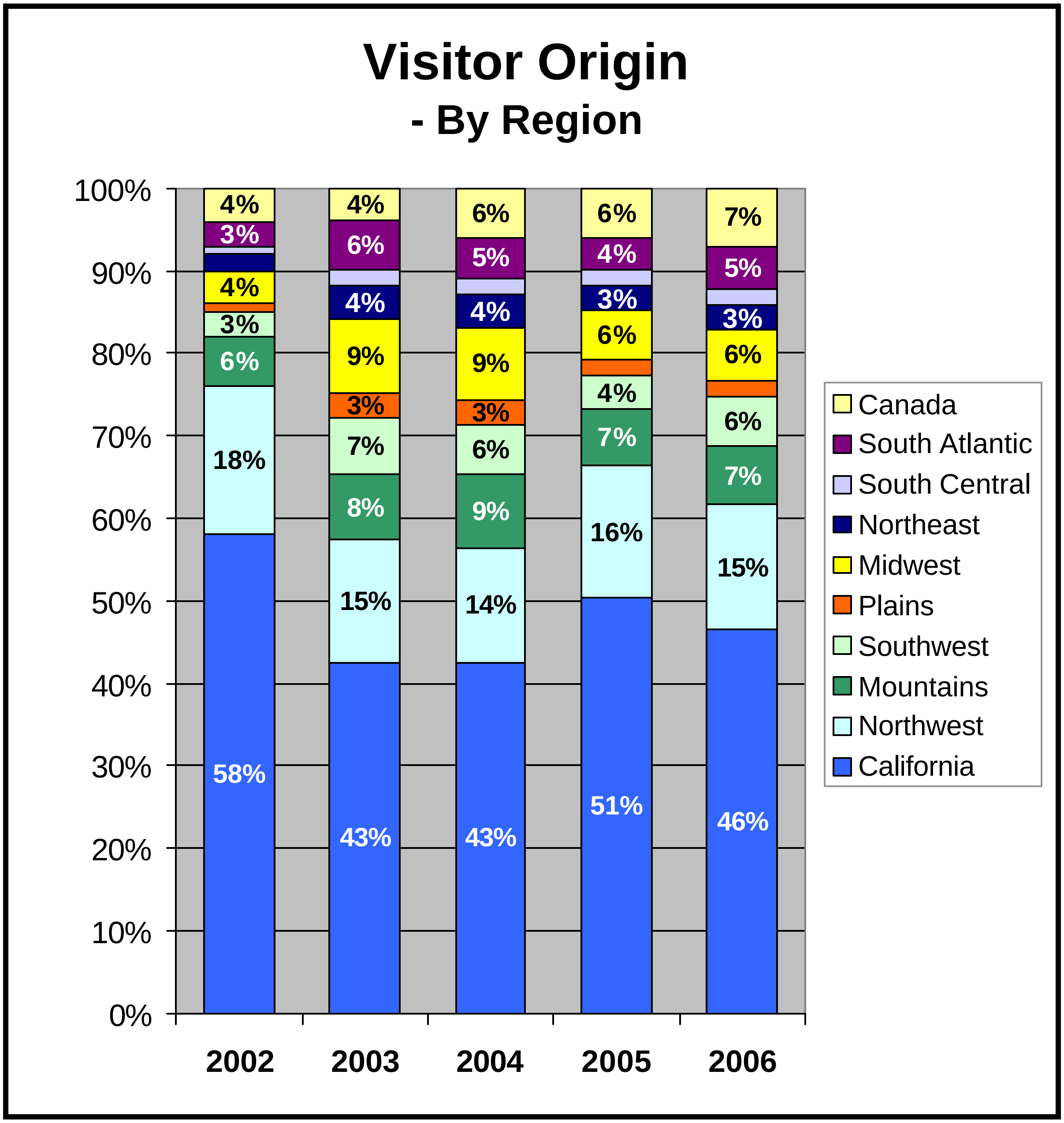


FIGURE 2: VISITOR ORIGIN

As expected, in 2006, California (46%) continued to be the major feeder market to the Reno-Sparks area. Nearly three out of four (74%) Reno-Sparks visitors came from the West and Mountain regions. Canada continued to grow as a feeder market to the Reno-Sparks area, up to 7% in 2006, from 4% in 2004. Visitor origin from other key markets – Oregon, Washington, and Nevada – remained stable.



* The values for percentages 2% or less are not shown.

FIGURE 3: VISITOR ORIGIN – California Markets

From the California market, the San Francisco Bay Area and Central Valley continued to be major feeder markets to the Reno-Sparks area in 2006.

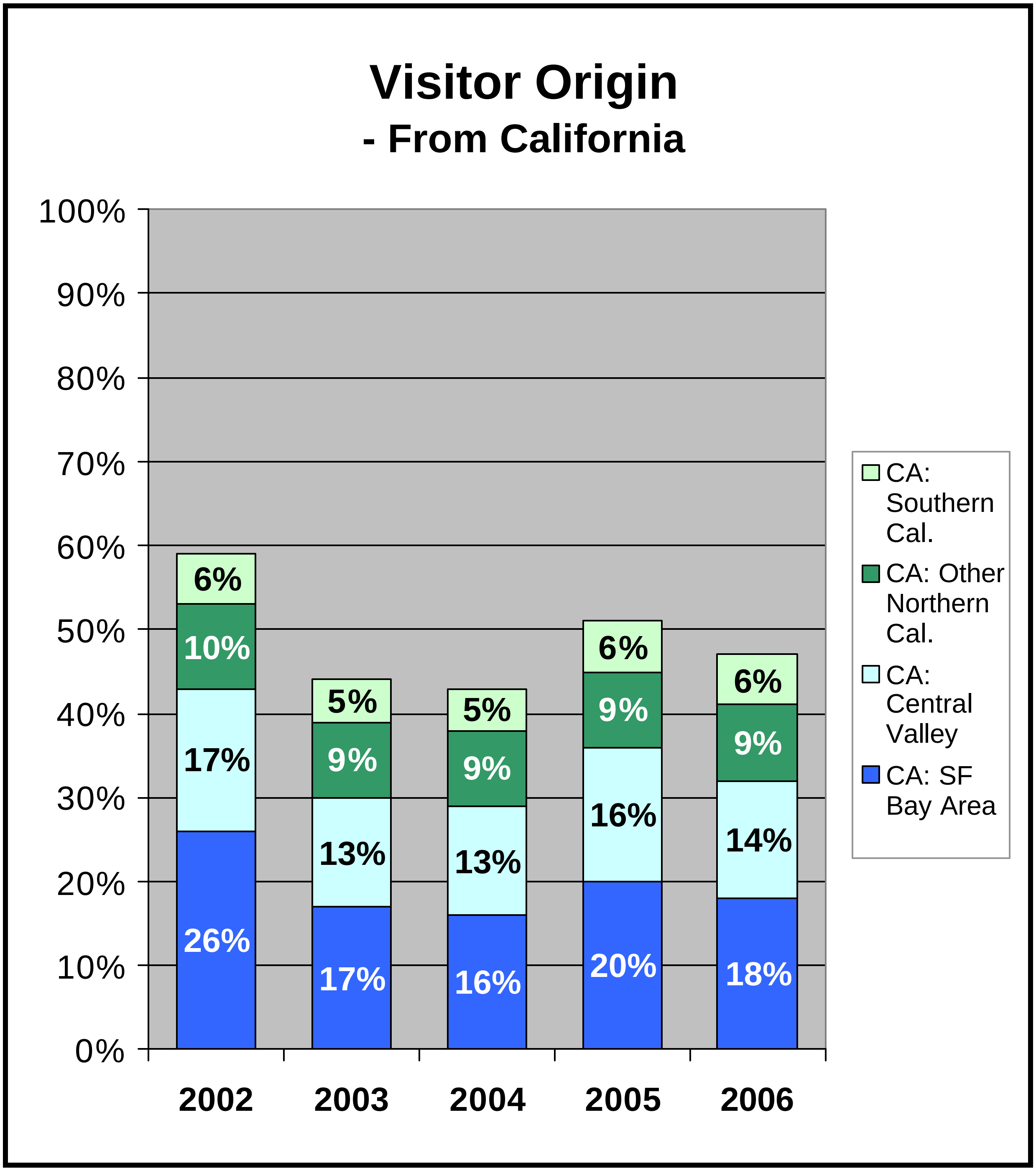
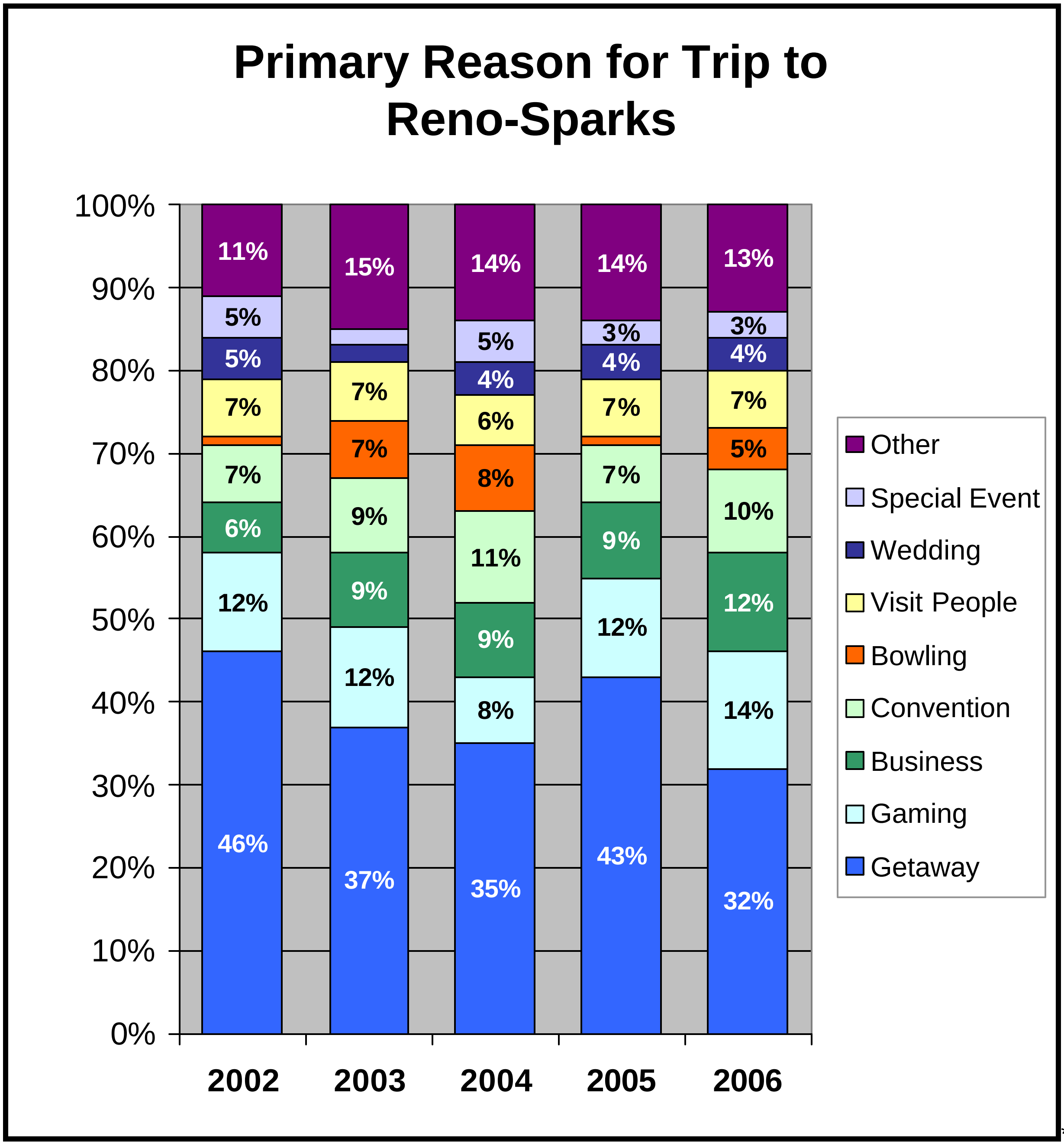


FIGURE 4: PRIMARY REASON FOR VISIT

Getaways/vacations remained the most popular primary reason for visiting Reno-Sparks in 2006. Compared to 2005, business, conventions, and bowling increased as principal reasons for visiting.



*The values for percentages 2% or less are not shown.

FIGURE 5: OVERNIGHT VISITORS IN RENO-SPARKS

In 2006, nearly all visitors (97%) from 100 or more miles away reported staying overnight in the Reno-Sparks area.

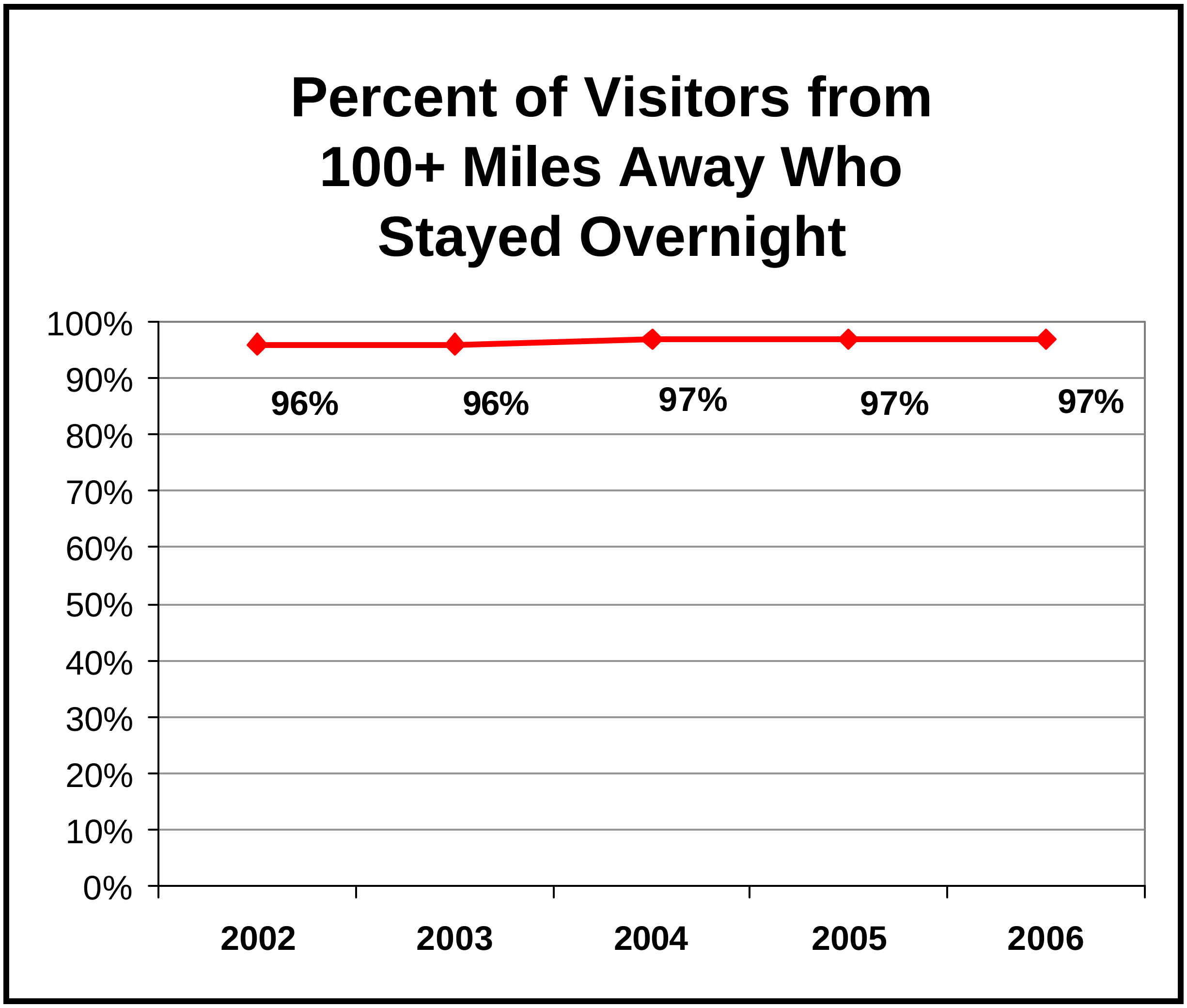


FIGURE 6: NUMBER OF NIGHTS IN RENO-SPARKS

In 2006, visitors who stayed overnight spent an average of 3.3 nights in Reno-Sparks, up slightly from 3.2 in 2005.

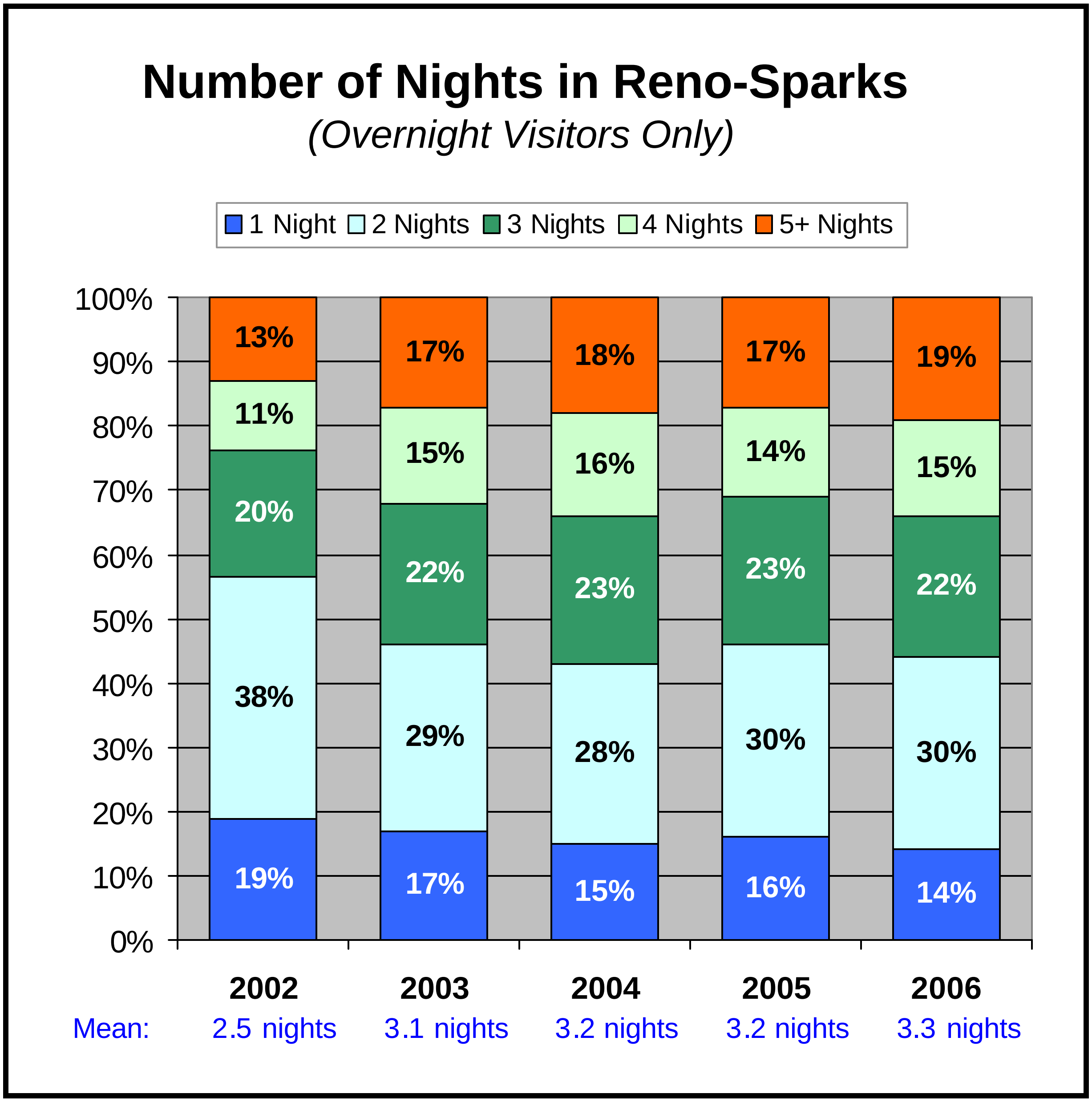
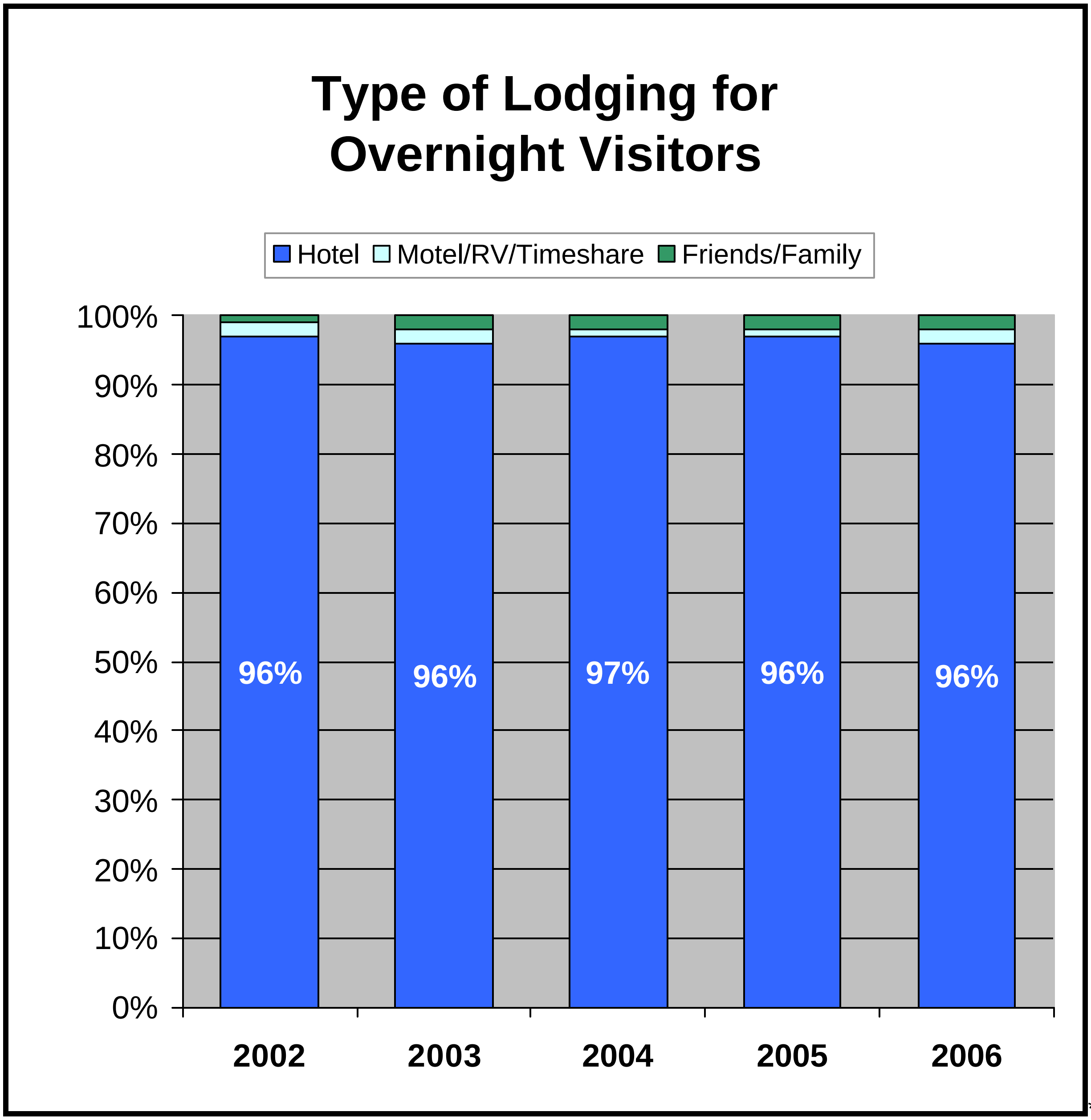


FIGURE 7: TYPE OF ACCOMMODATIONS

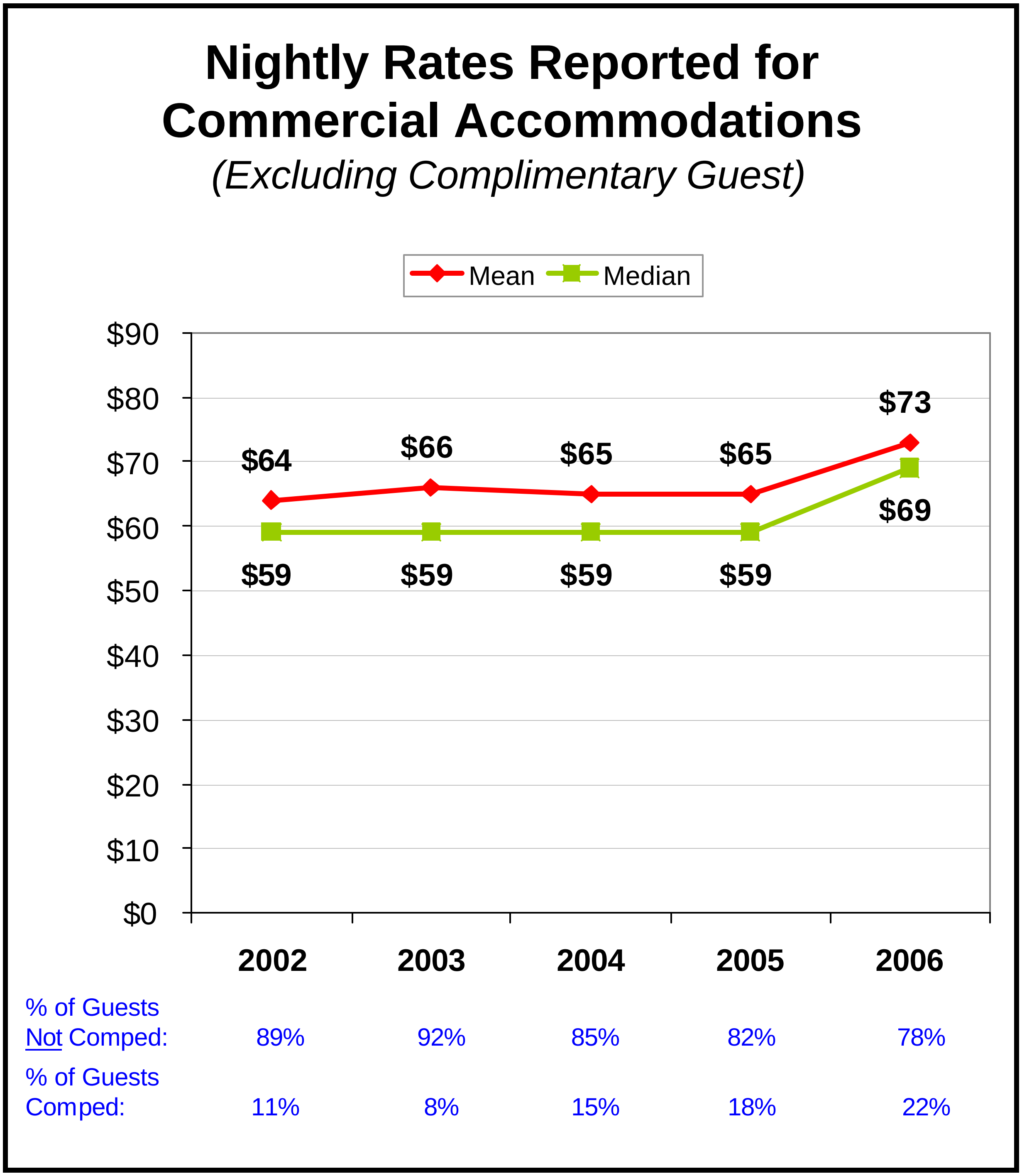
Consistently, the majority of visitors stayed at a hotel in Reno-Sparks; since potential respondents were intercepted at local hotel-casinos, the methodology for this study captures primarily the hotel guest market.



*The values for percentages 2% or less are not shown.

FIGURE 8: NIGHTLY ROOM RATES

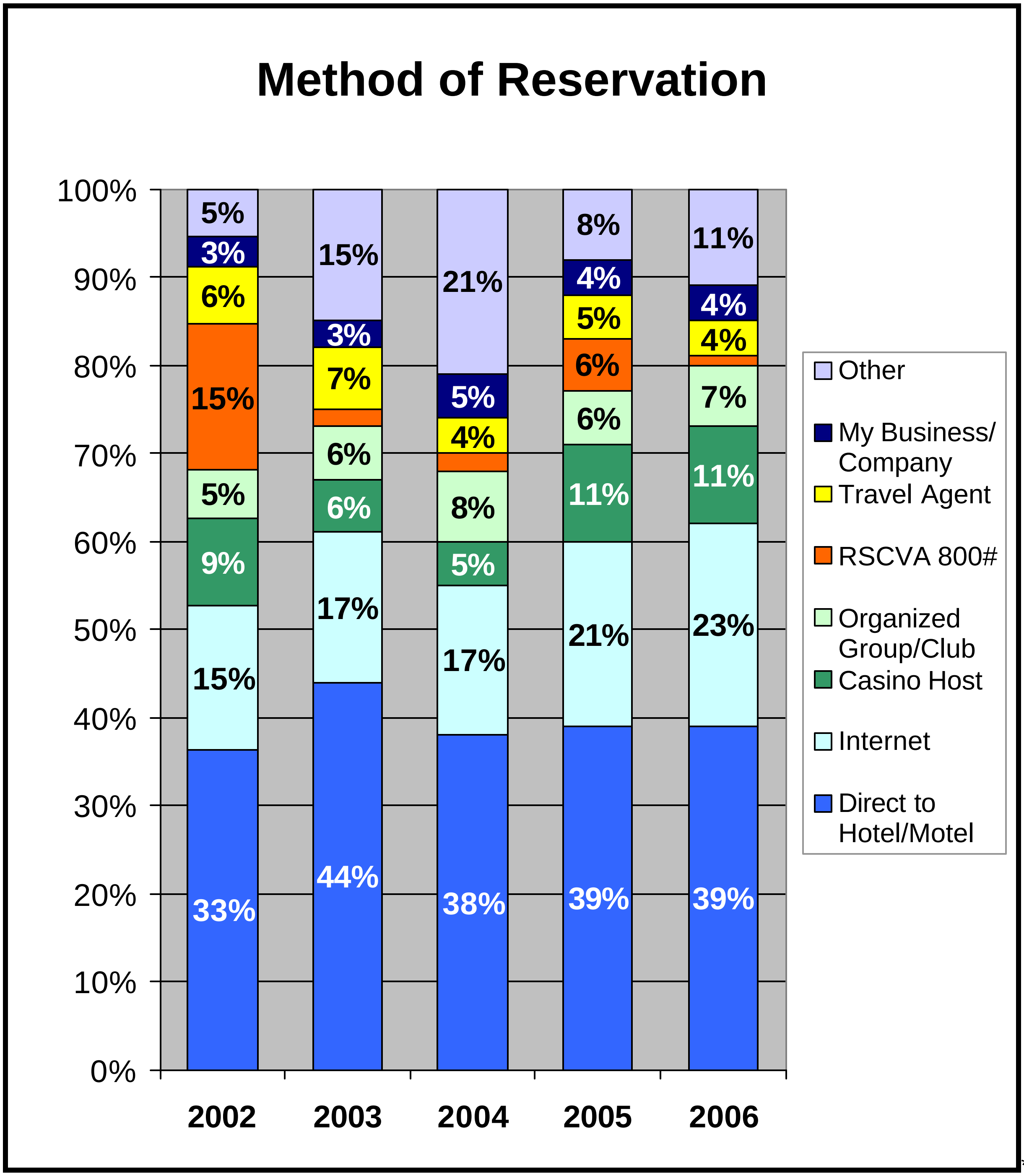
On average (mean), reported nightly room rates increased to $73 in 2006, up from $65 in 2005.



*Due to Reno-Sparks hotel rate increases in 2006, higher reported room rates were included in the averages than were in past years.

FIGURE 9: METHOD OF MAKING RESERVATION

Making reservations directly through a hotel or motel remained the main method for booking lodging reservations in 2006. The percent of visitors who used the internet to make reservations increased to 23% in 2006, from 21% in 2005 and 17% in 2004.

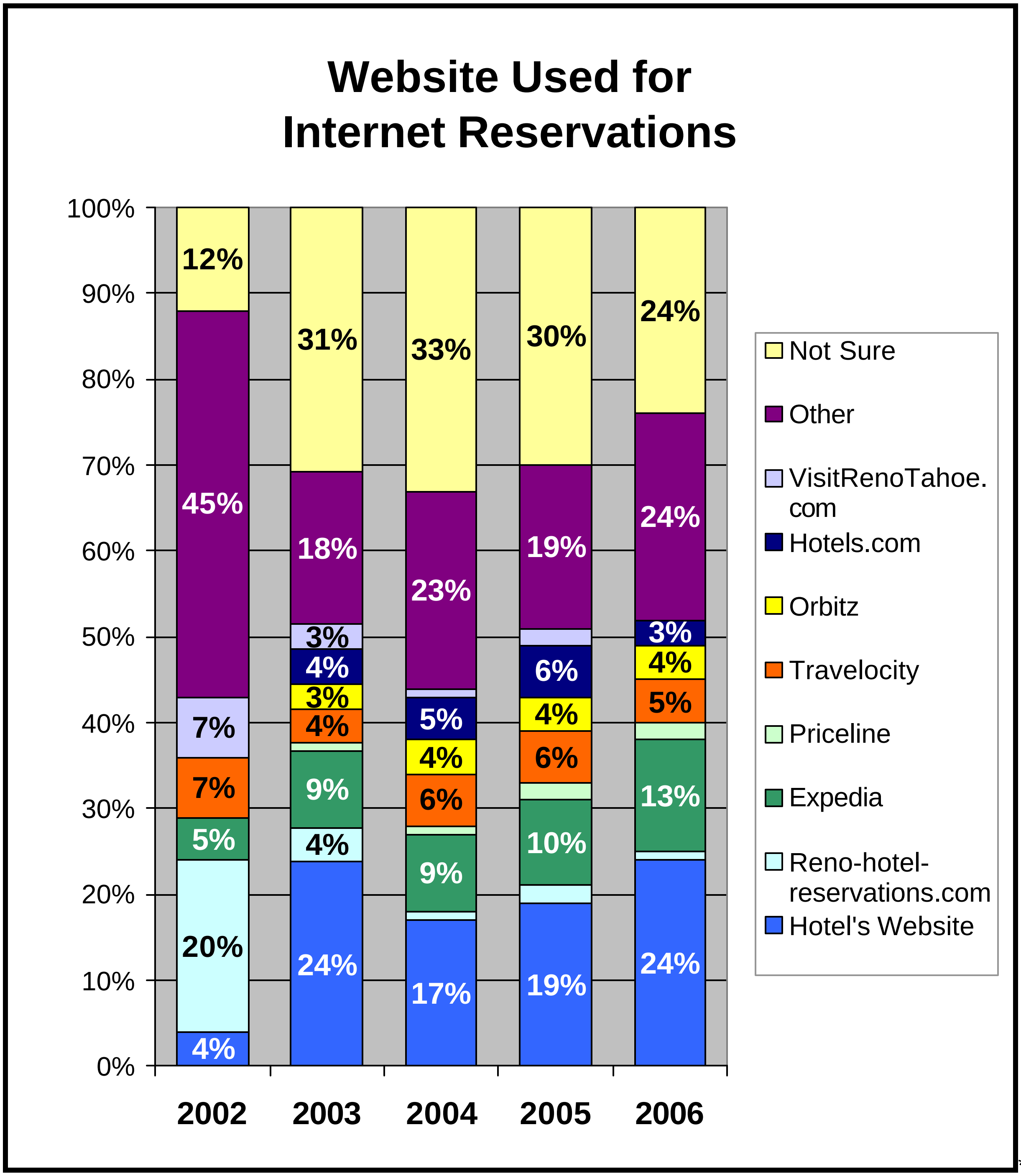


*

The values for percentages 2% or less are not shown.

FIGURE 10: INTERNET RESERVATIONS

In 2006, hotel websites remained the main internet sites used to make reservations, followed by Expedia.com. Nearly one out of four (24%) visitors who booked online were not sure which website they used to book their reservations.



*

The values for percentages 2% or less are not shown.

FIGURE 11: RESERVATION LEAD TIME – By Quarter

On average, in 2006, visitors booked their reservations in Reno-Sparks 3 to 4 weeks in advance. Looking by quarter, visitors who stayed in Reno-Sparks during the 2nd quarter (April - June) booked further in advance (4 to 5 weeks) than the average for 2006.

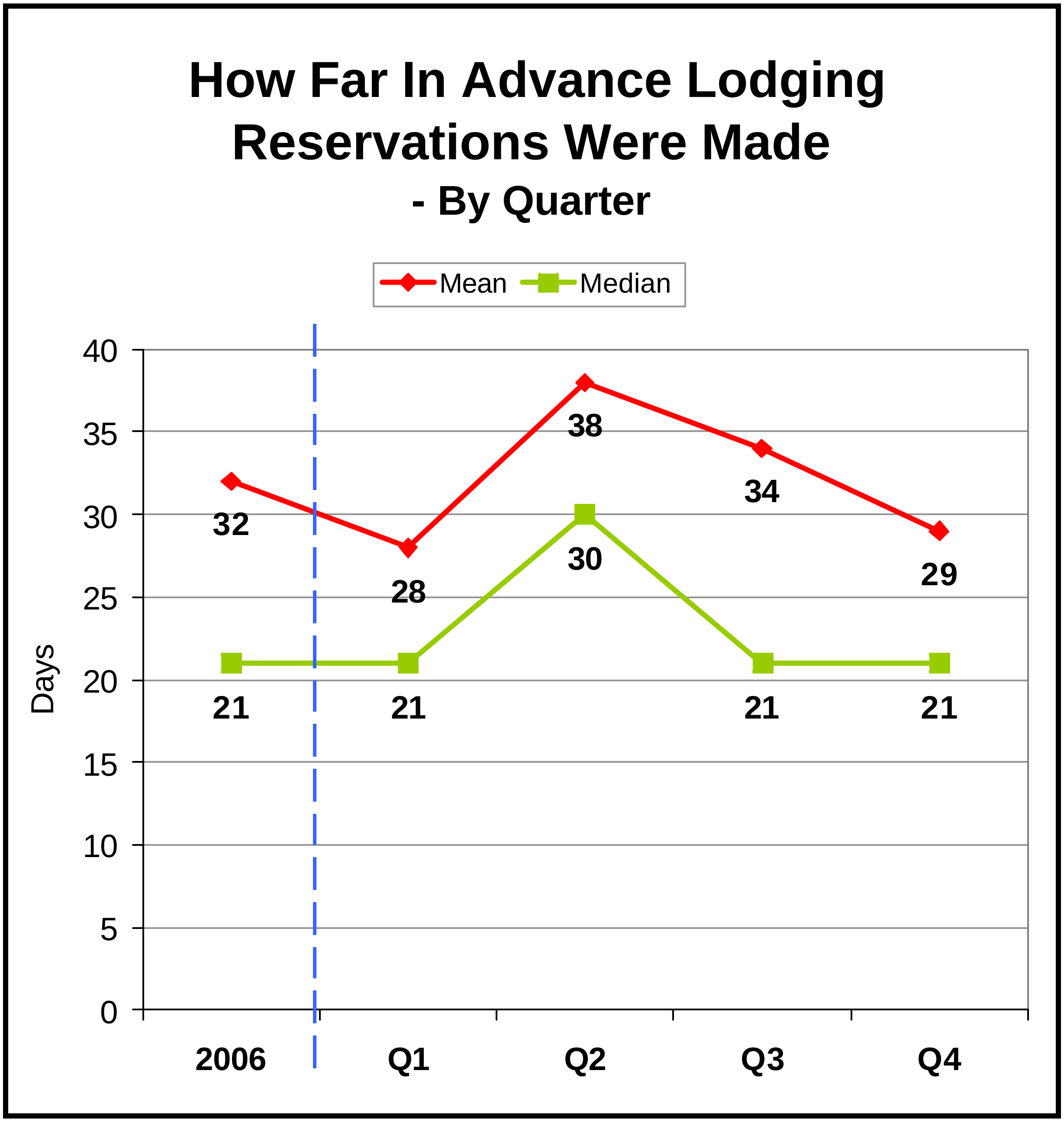


FIGURE 12: NUMBER OF PEOPLE IN PARTY

On average (mean), the total party size remained approximately 3 people in 2006; adults, 21 years or older, comprised the majority of the party size.

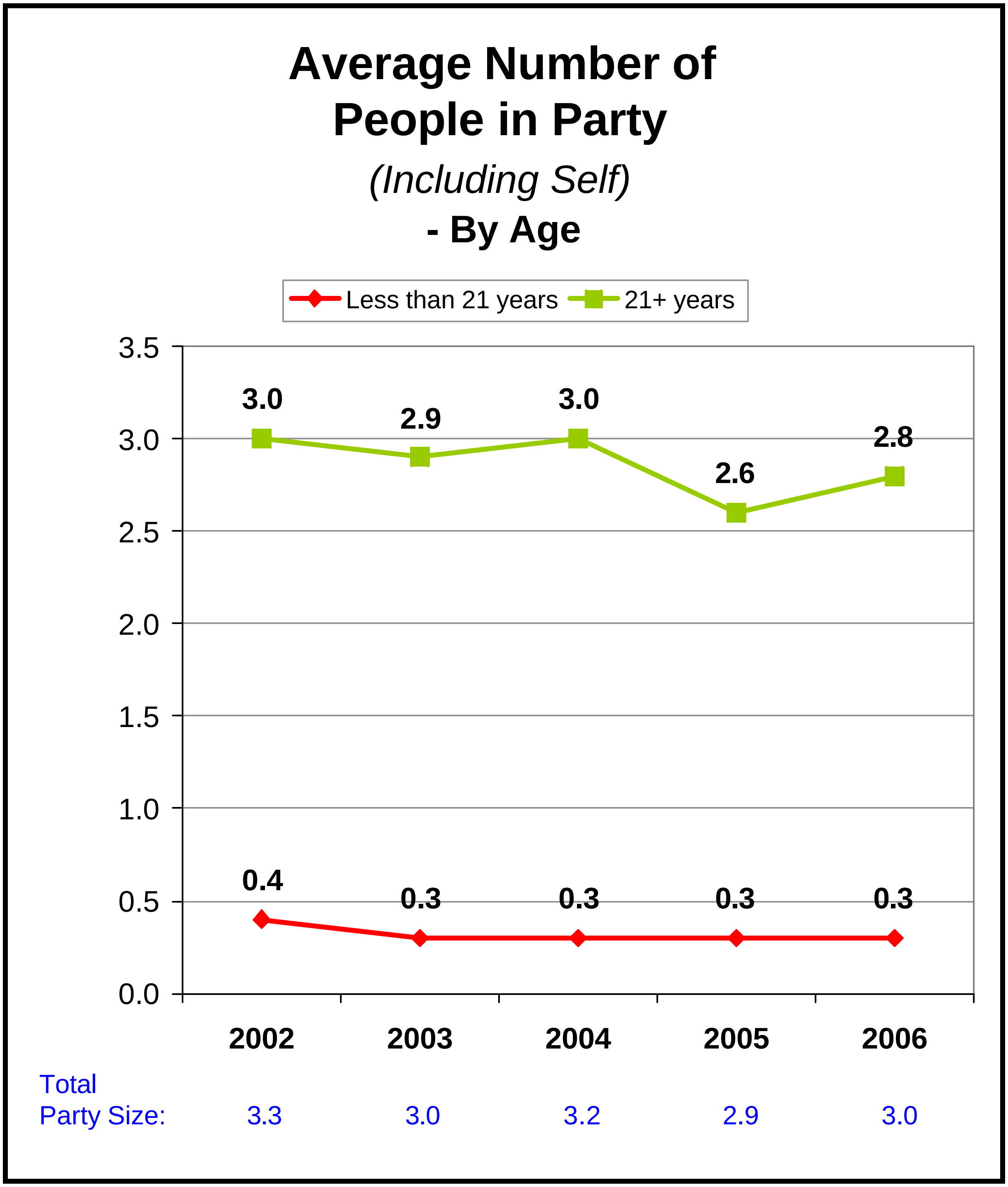


FIGURE 13: NUMBER OF PEOPLE IN ROOM

The average (mean) number of people that stayed in a hotel room remained 2 people per room in 2006.

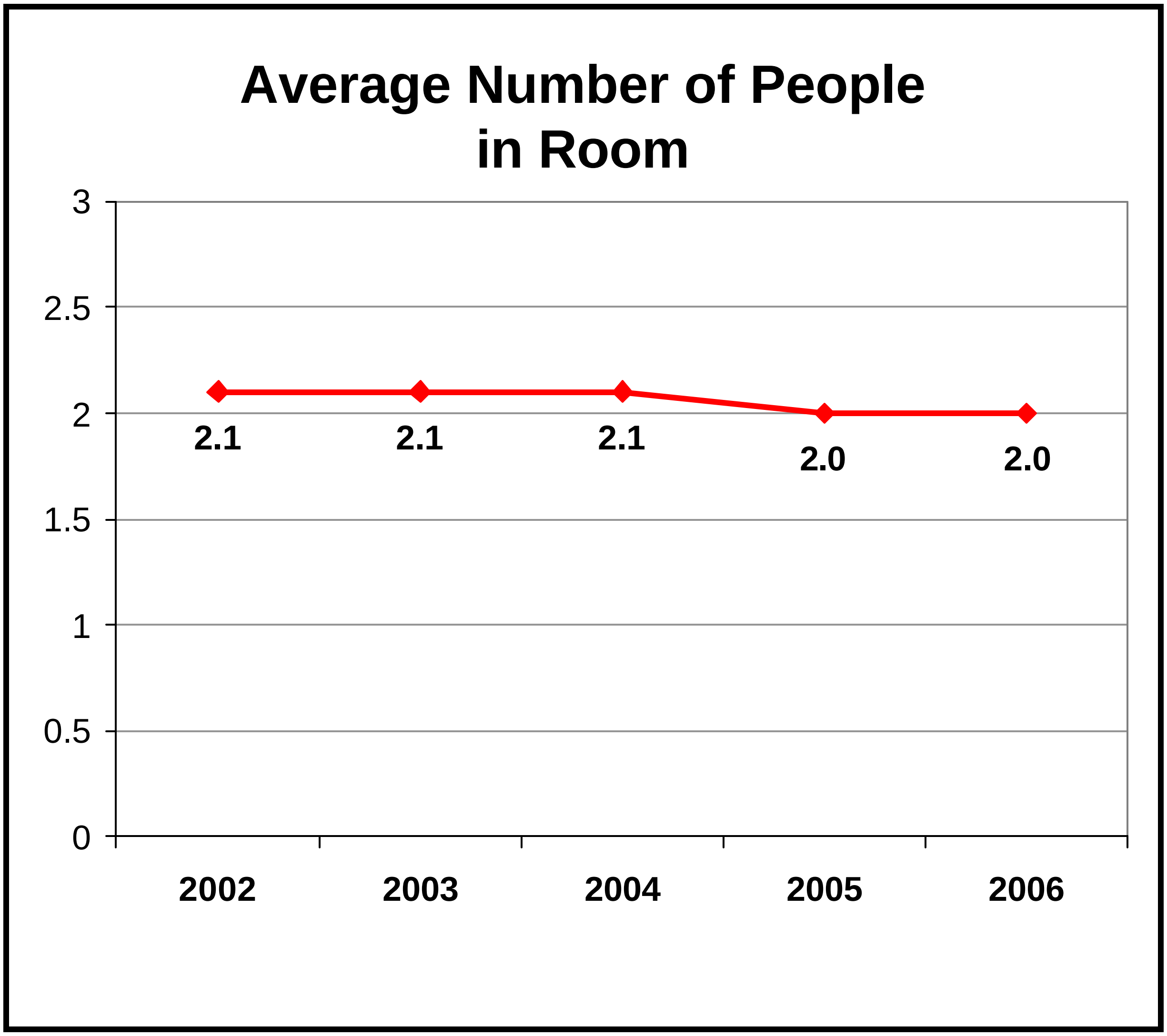


FIGURE 14: PRIMARY METHOD OF TRAVEL

In 2006, private vehicle (57%) remained the primary method of travel to Reno-Sparks. About 32% arrived by air.

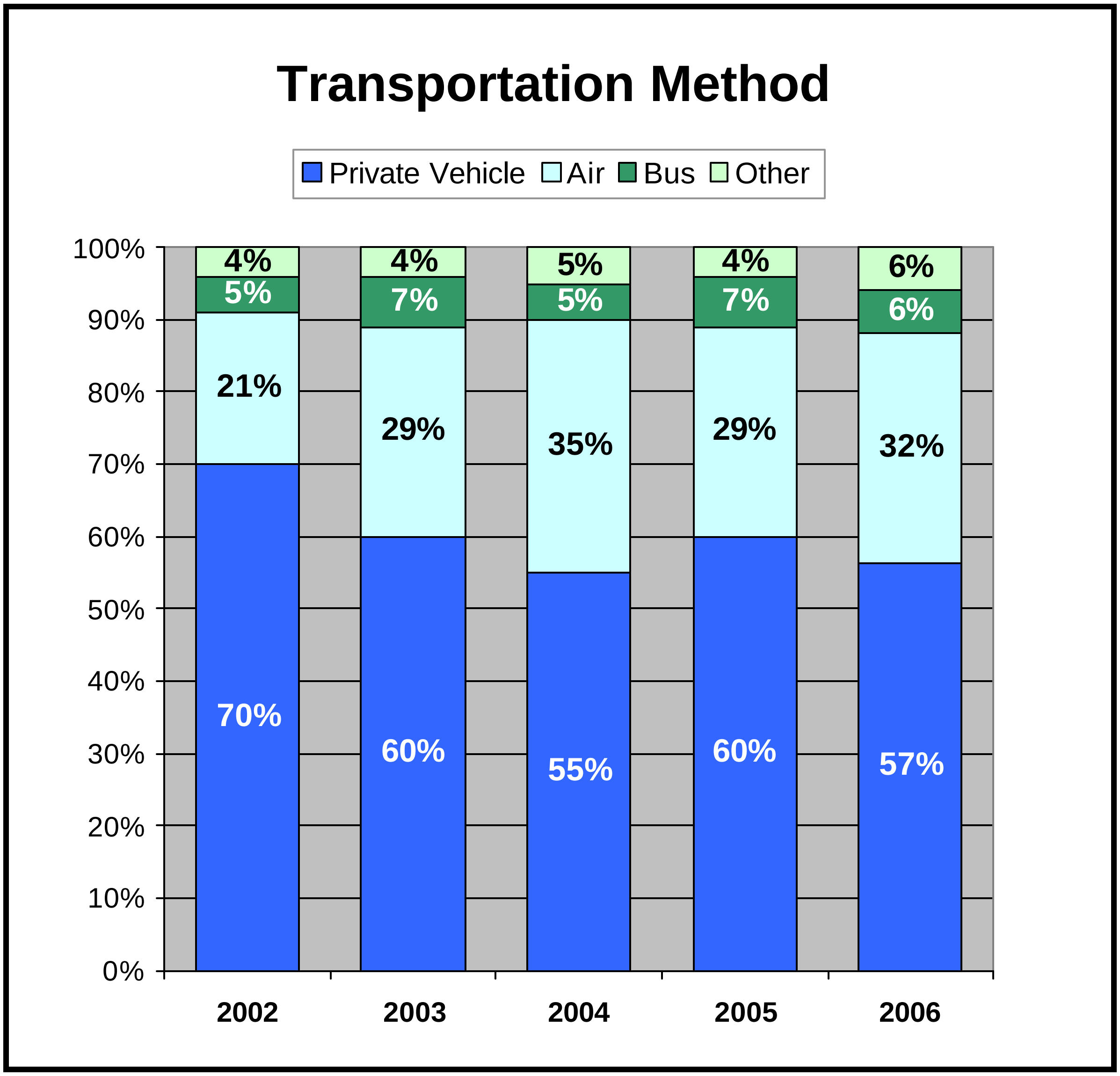
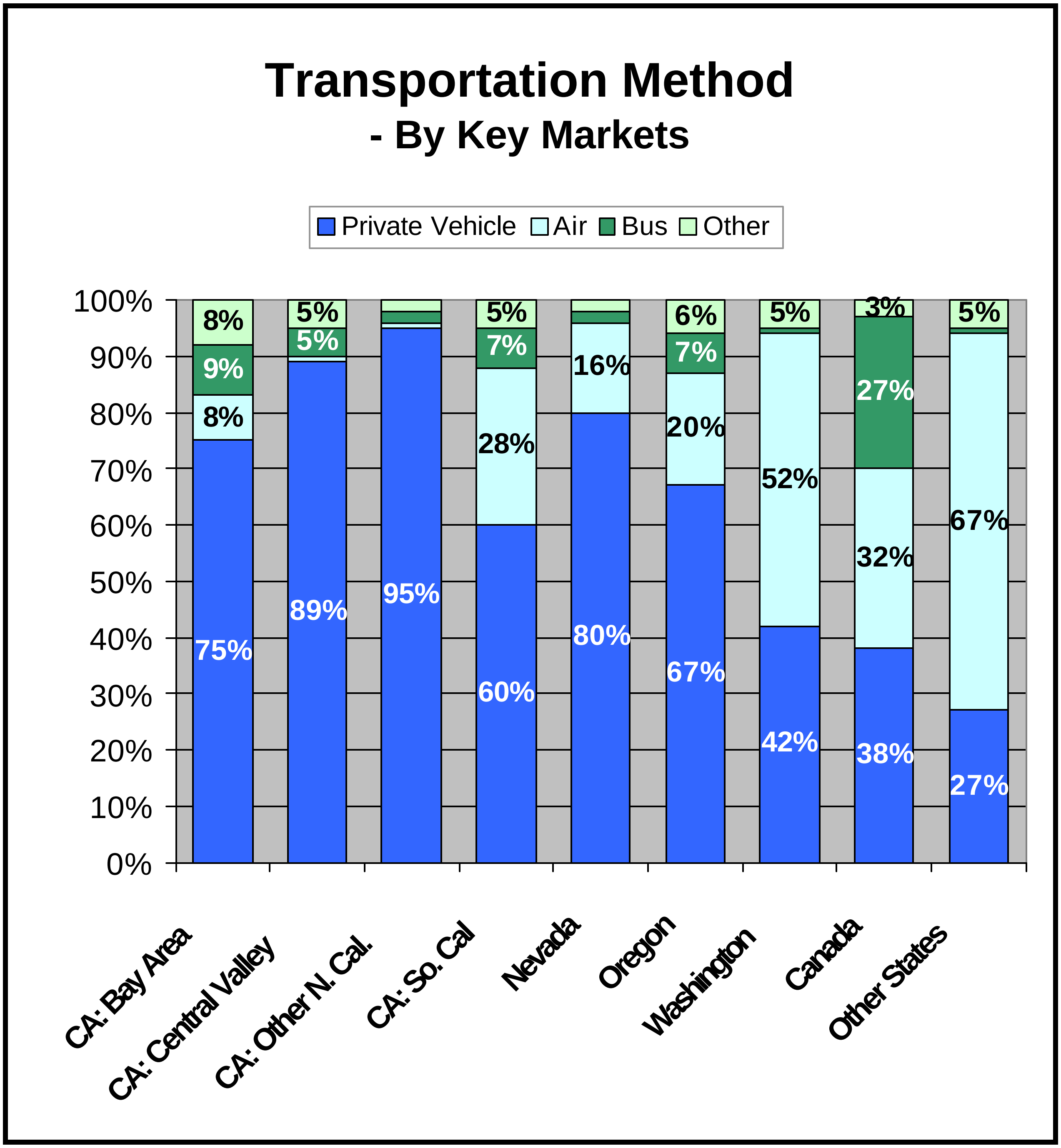


FIGURE 15: PRIMARY METHOD OF TRAVEL – By Key Markets

As would be expected, the primary means of travel varied by origin in key markets – private vehicle was the primary method for over 75% of visitors coming from the California Bay Area, the Central Valley, other Northern California areas, and Nevada; while airplane was the primary method for over half (52%) of visitors from Washington, one-third (32%) from Canada and 28% from Southern California.



* The values for percentages 2% or less are not shown.

FIGURE 16: NUMBER OF PREVIOUS VISITS

In 2006, four out of five (80%) Reno-Sparks visitors had been to the area one or more times in the past 5 years, not including the current trip.

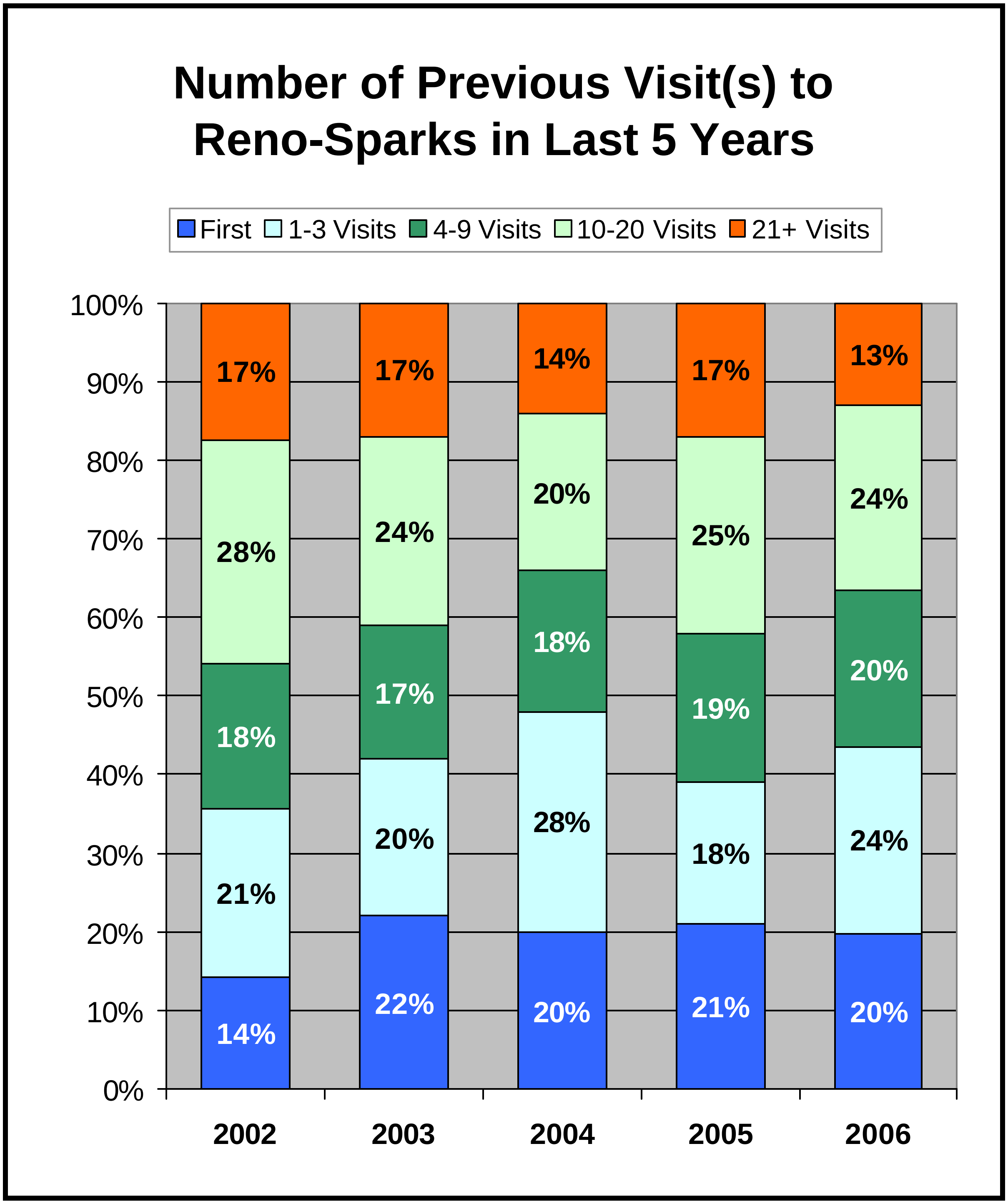
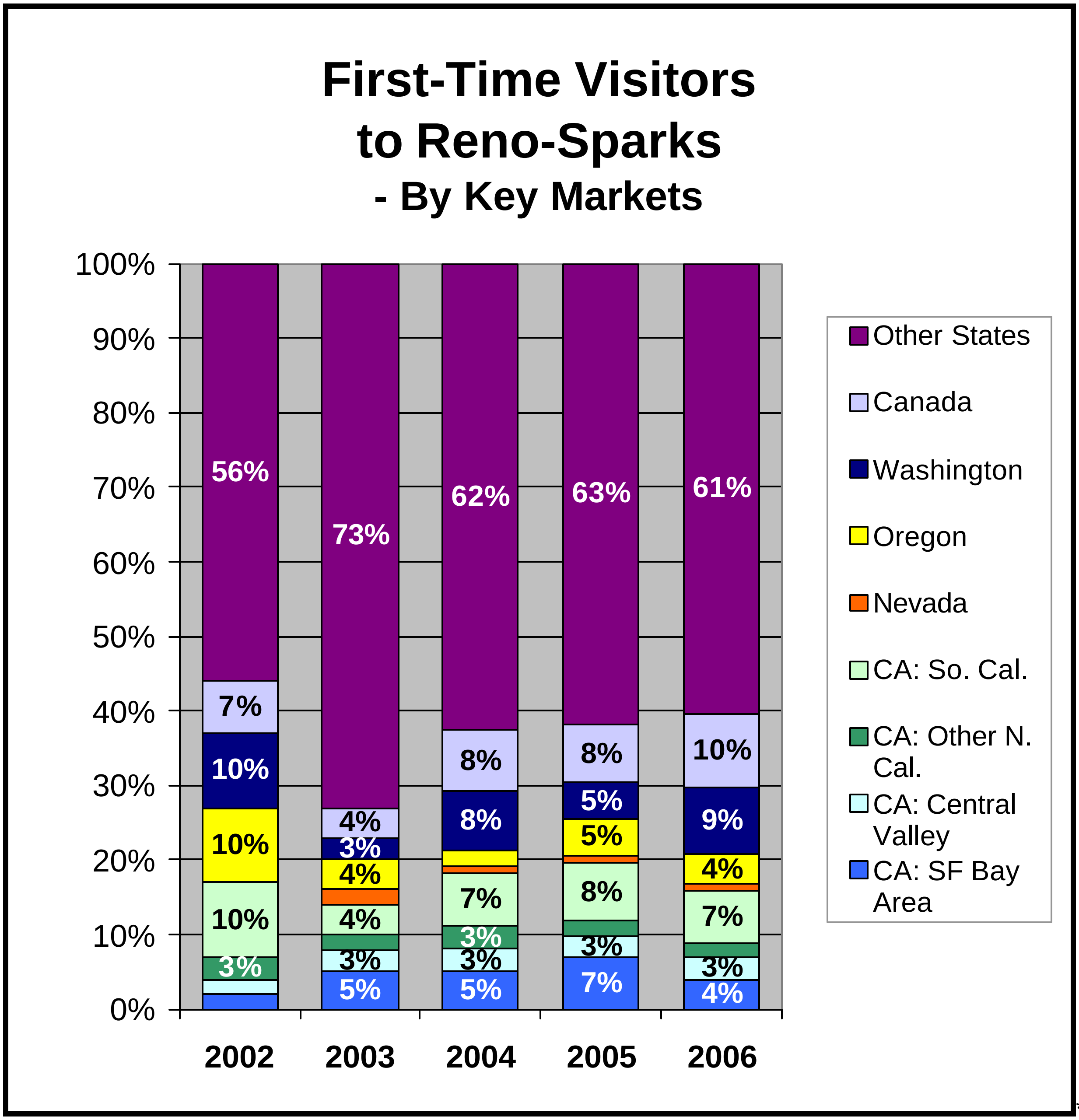


FIGURE 17: FIRST TIME VISITORS TO RENO-SPARKS – By Key Markets

In general, over half the first-time visitors (someone who has not visited Reno-Sparks within 5 years) came from states other than key markets. In 2006, the percent of first-time visitors from Washington increased to 9%, up from 5% in 2005. Among the key markets, Southern California (7%) and Canada (10%) continued to be large contributors of first-time visitors.



*

The values for percentages 2% or less are not shown.

FIGURE 18: VISITATION TO LAKE TAHOE

One out of five (19%) visitors reported going to Lake Tahoe during their trip to Reno-Sparks in 2006; this is in line with the visitation in previous years.

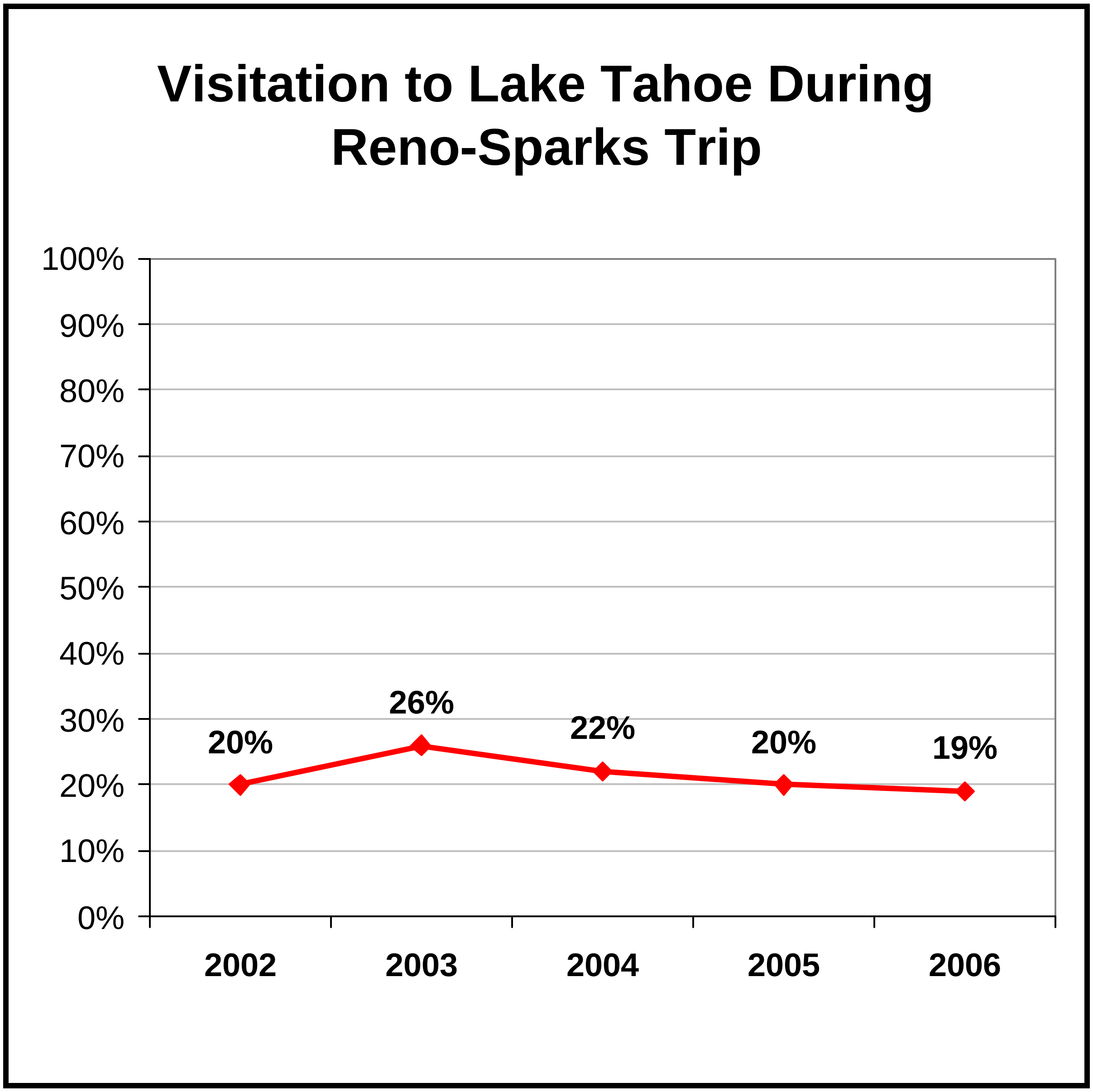


FIGURE 19: VISTATION TO LAKE TAHOE – By Quarter

In 2006, a higher percentage of visitors, who went to Lake Tahoe as part of their trip to Reno-Sparks, visited Tahoe during the spring and summer months (Q2 and Q3) than in the winter and fall months (Q1 and Q4).

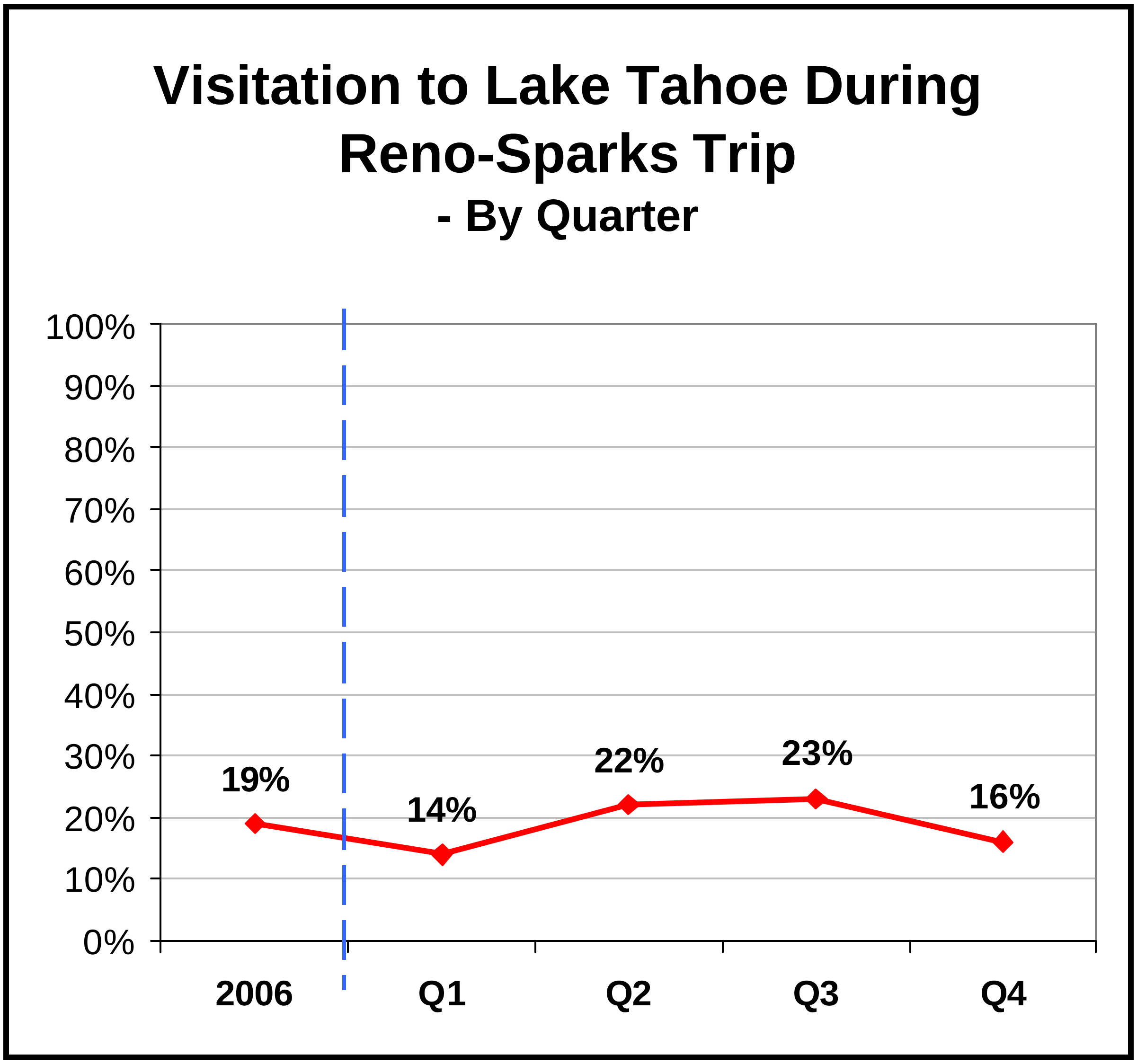


FIGURE 20: VISITATION TO LAKE TAHOE – By Key Markets

In 2006, over one-third (36%) of visitors from states other than the key markets went to Lake Tahoe during their trip to Reno-Sparks.

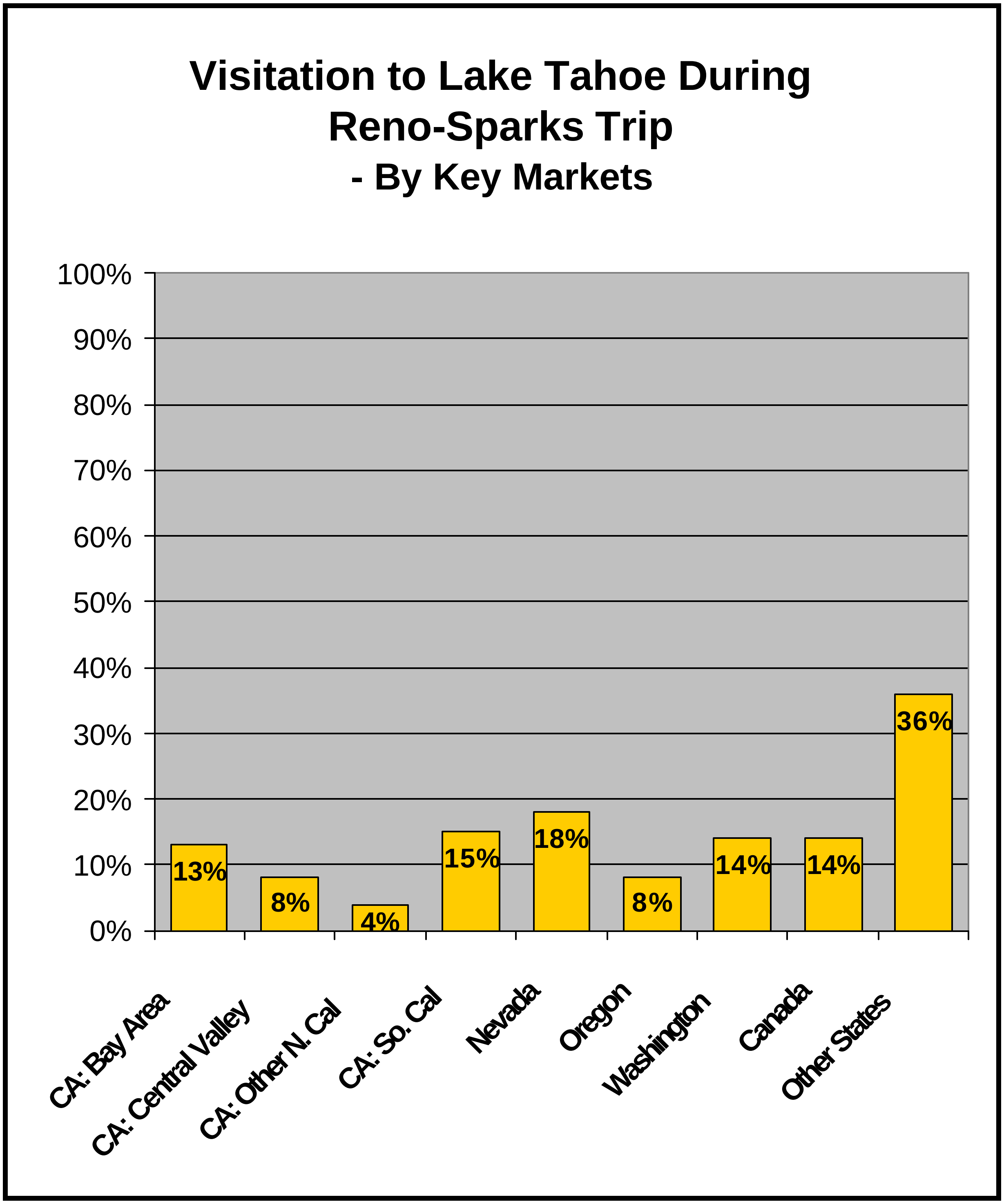


FIGURE 21: ACTIVITY PARTICIPATION WHILE IN RENO-SPARKS

In 2006, gaming (91%), getting away/vacationing (79%), shopping (55%), sightseeing (40%) and going to shows (34%) were the top five activities in which visitors participated while in Reno-Sparks.

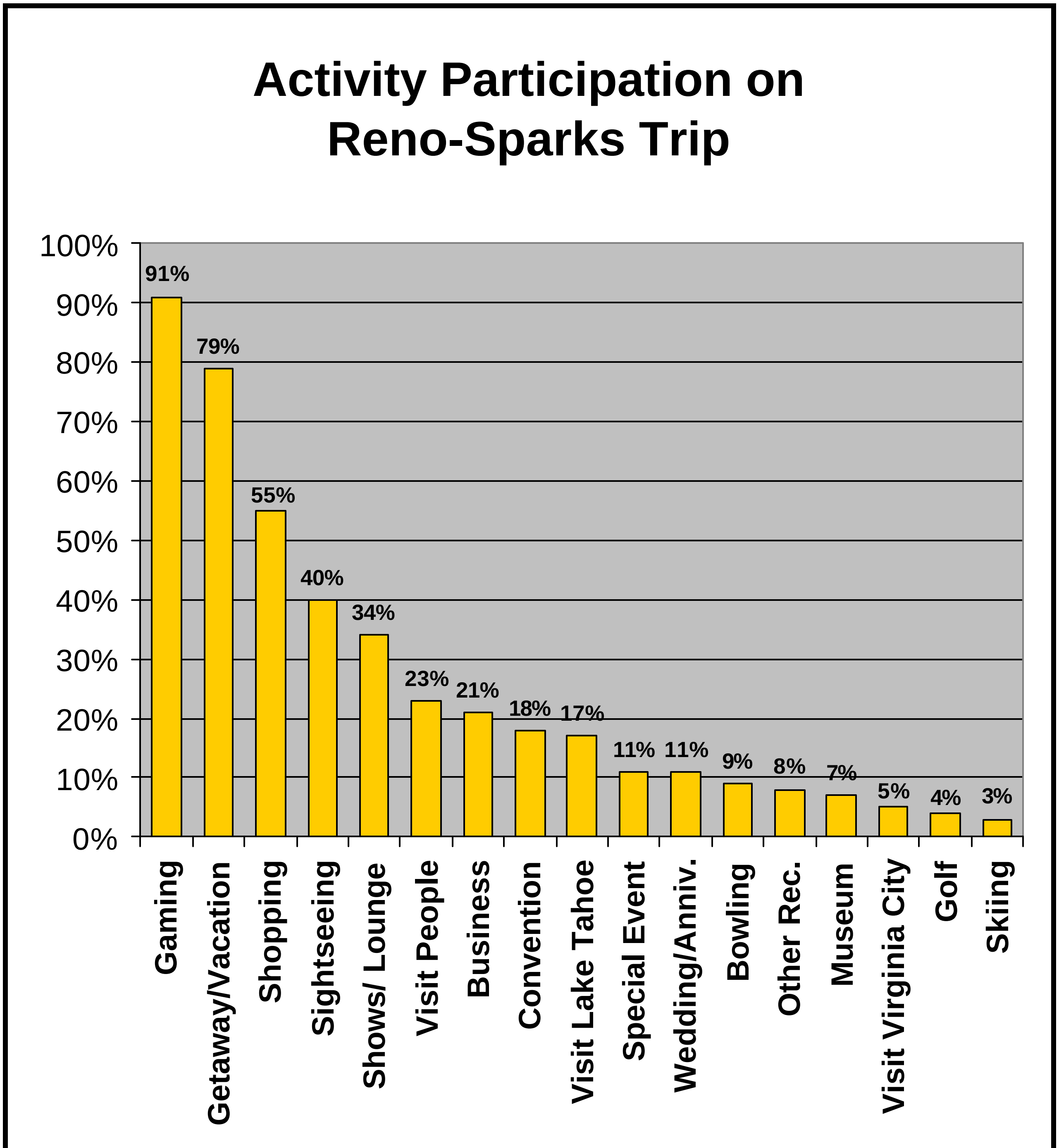


FIGURE 22: CONVENTIONS

In 2006, convention attendance returned to 2004 levels: 18% of visitors reported attending a convention.

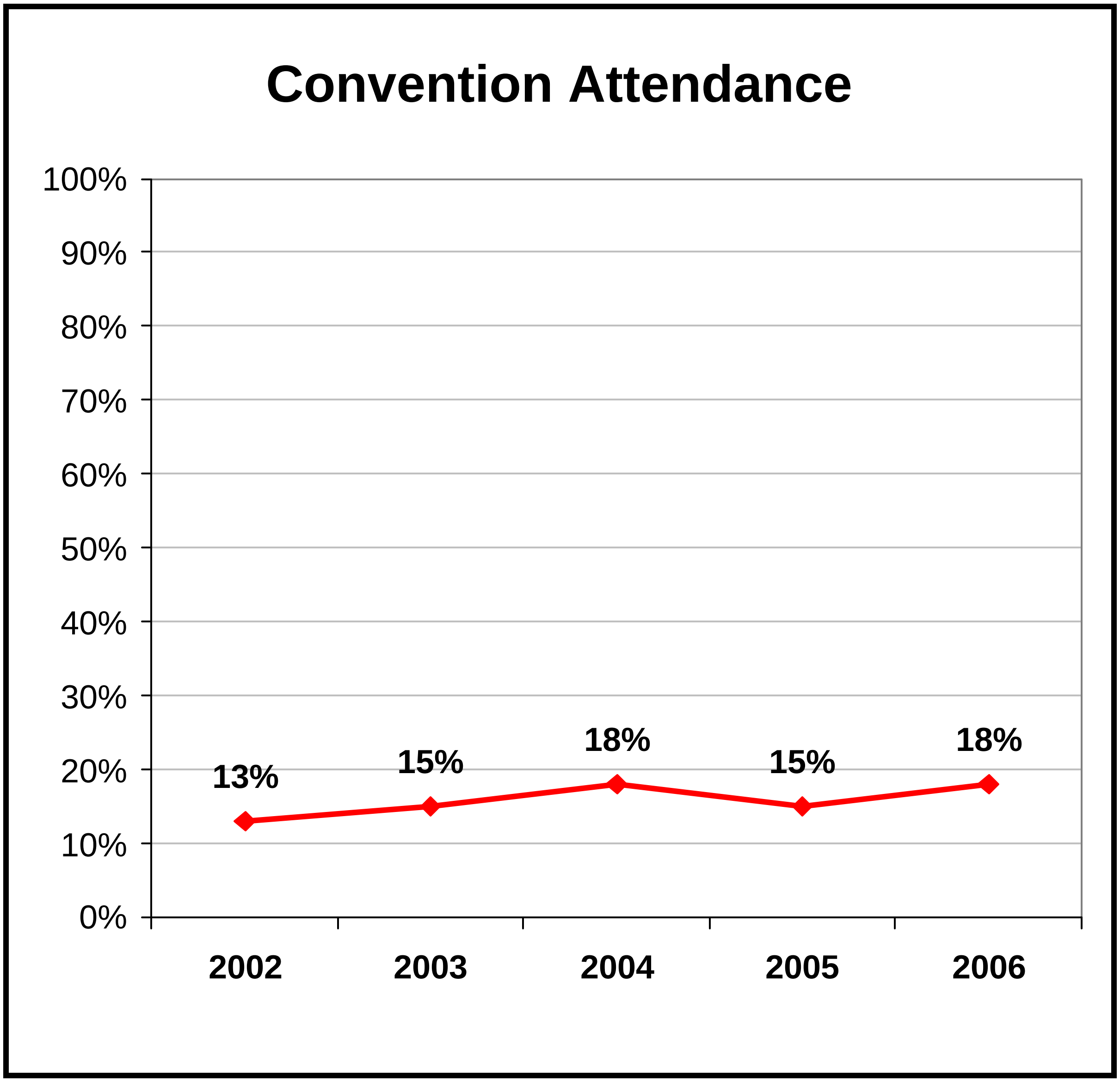


FIGURE 23: PER CAPITA TRIP SPENDING

Per capita spending per trip continued to steadily increase; in 2006, total spending per trip increased to $1,058, up from $1,000 in 2005 and $955 in 2004. Lodging and shopping contributed to the increase.

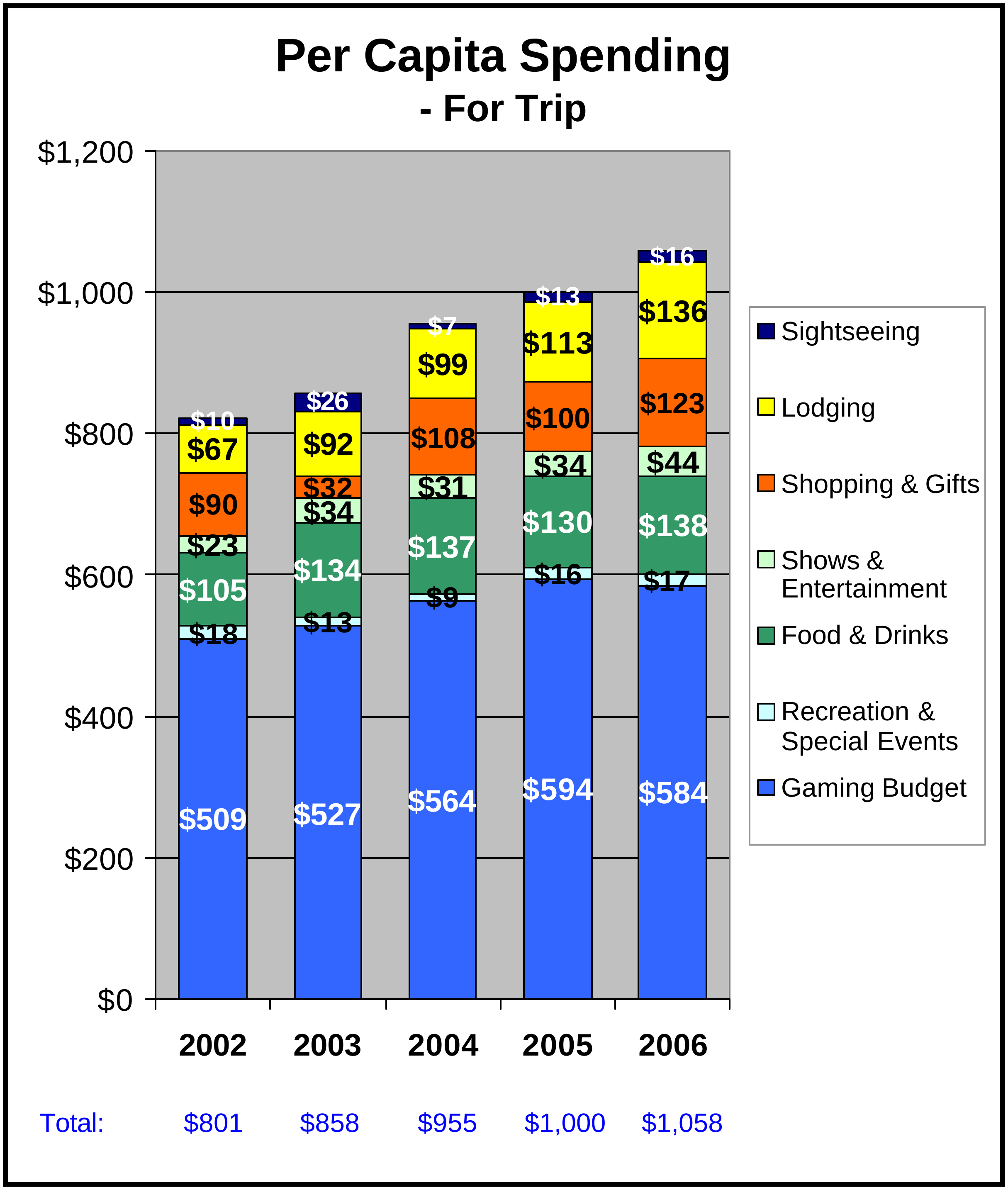


FIGURE 24: PER CAPITA DAILY SPENDING

Per capita spending per day decreased slightly from $378 in 2005 to $366 in 2006, although it remained higher than the daily averages in 2004. Two factors contributed to the finding that while per capita spending per trip increased, the per capita spending per day decreased slightly: (1) the average length of stay increased from 3.1 to 3.2; (2) per capita figures were calculated on an individual rather than aggregate basis and visitors who stayed longer tended to spend more per day, on average. The decline in spending per day is primarily attributable to a decrease in the daily gaming budget.

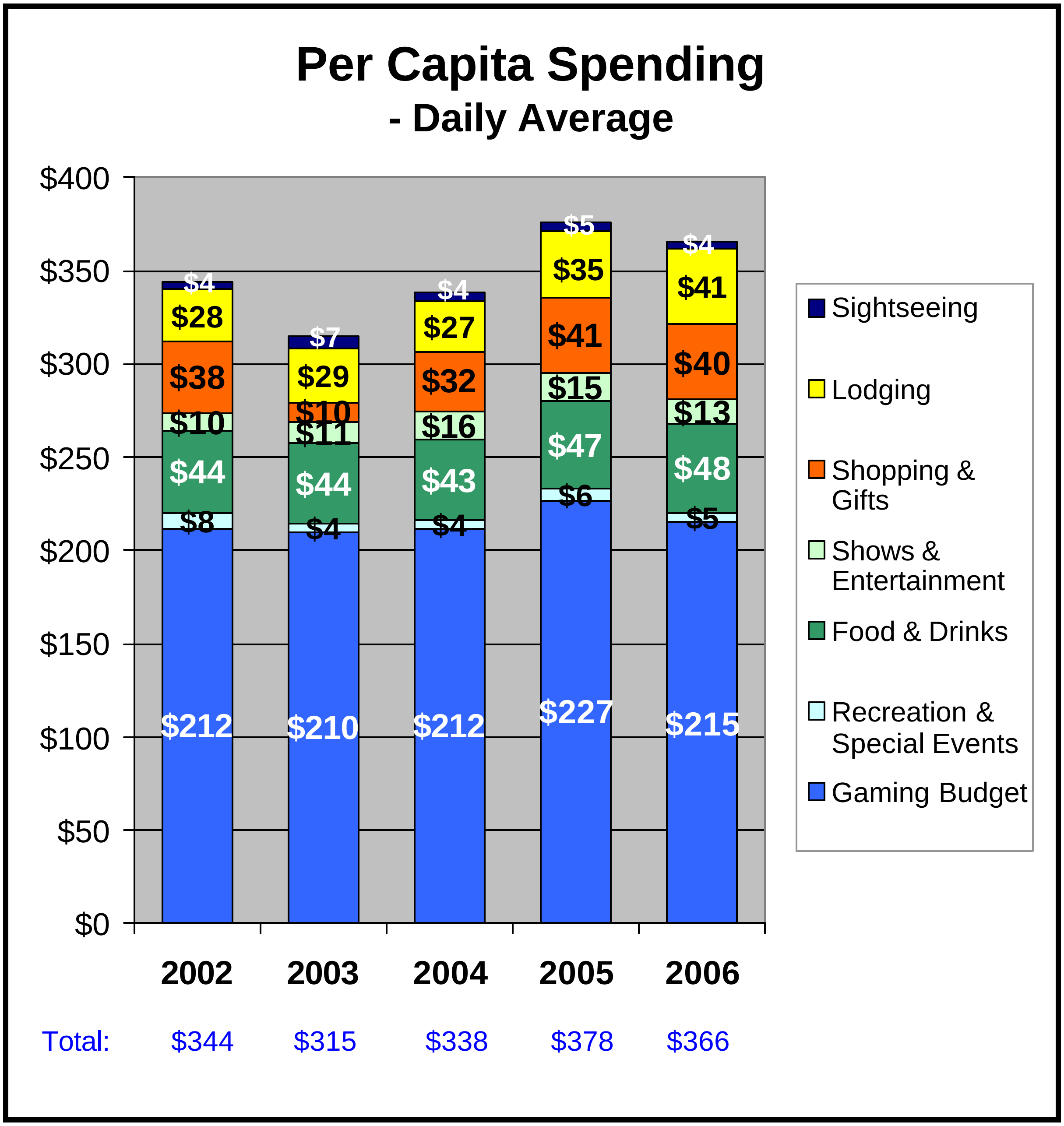


FIGURE 25: ENJOYMENT OF TRIP

In 2006, the average (mean) level of enjoyment of the trip to Reno-Sparks on a 5-point scale, where 5 is the excellent, remained high with a 4.2 rating.

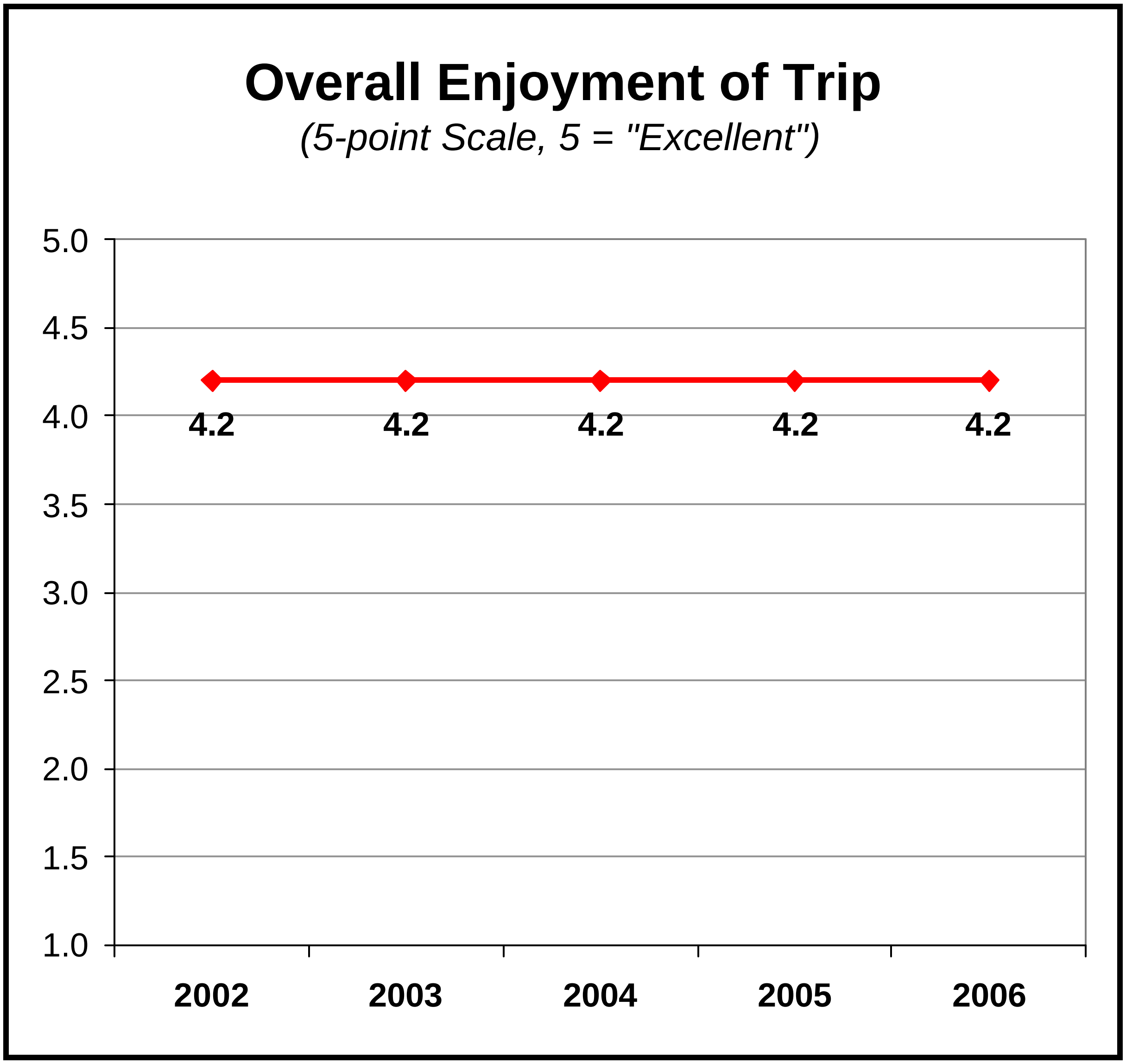


FIGURE 26: ENJOYMENT OF TRIP – By Key Markets

For visitors from key markets, origin did not differentiate trip enjoyment; for all key markets, in 2006, the enjoyment level between 4.1 and 4.3.

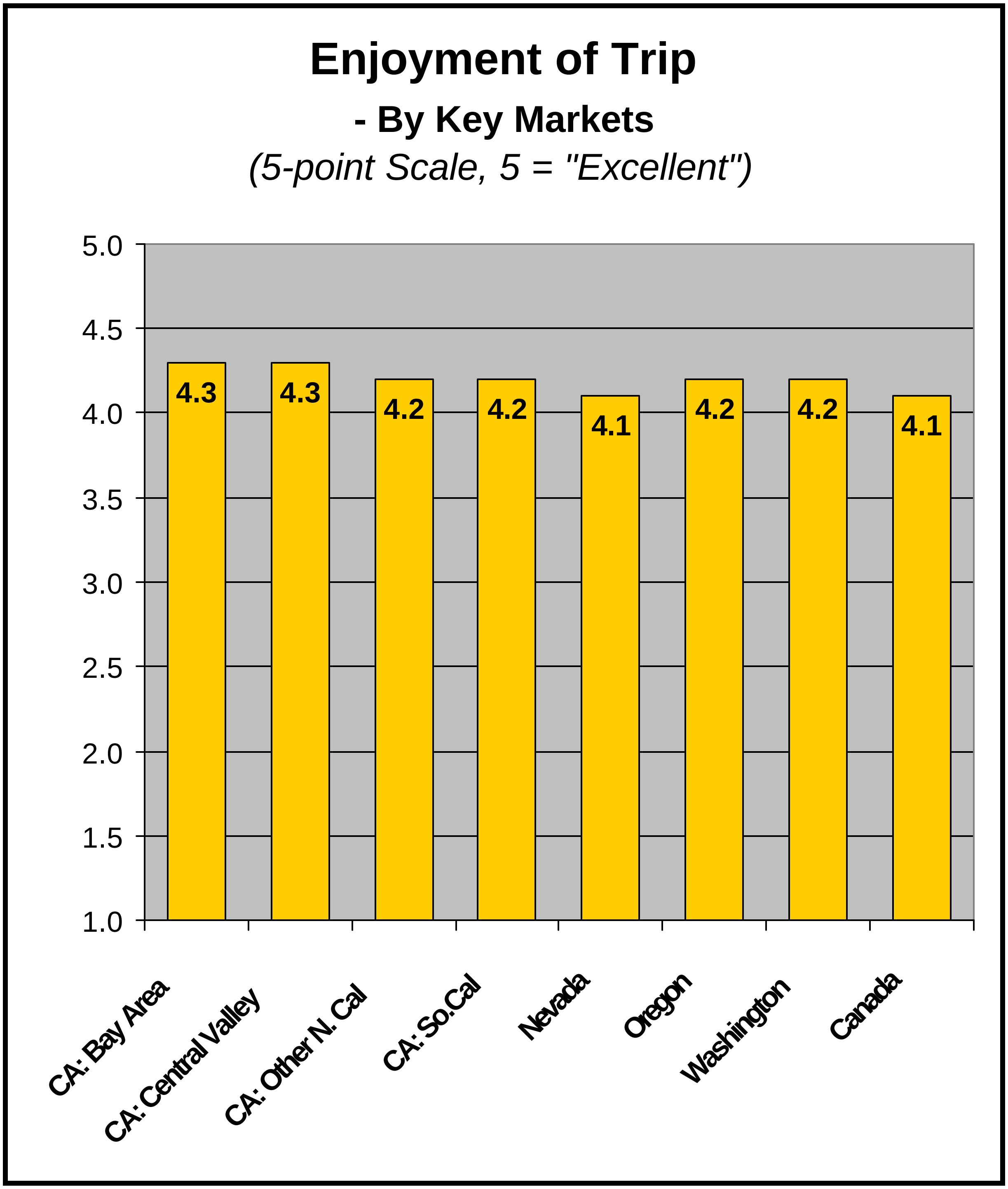
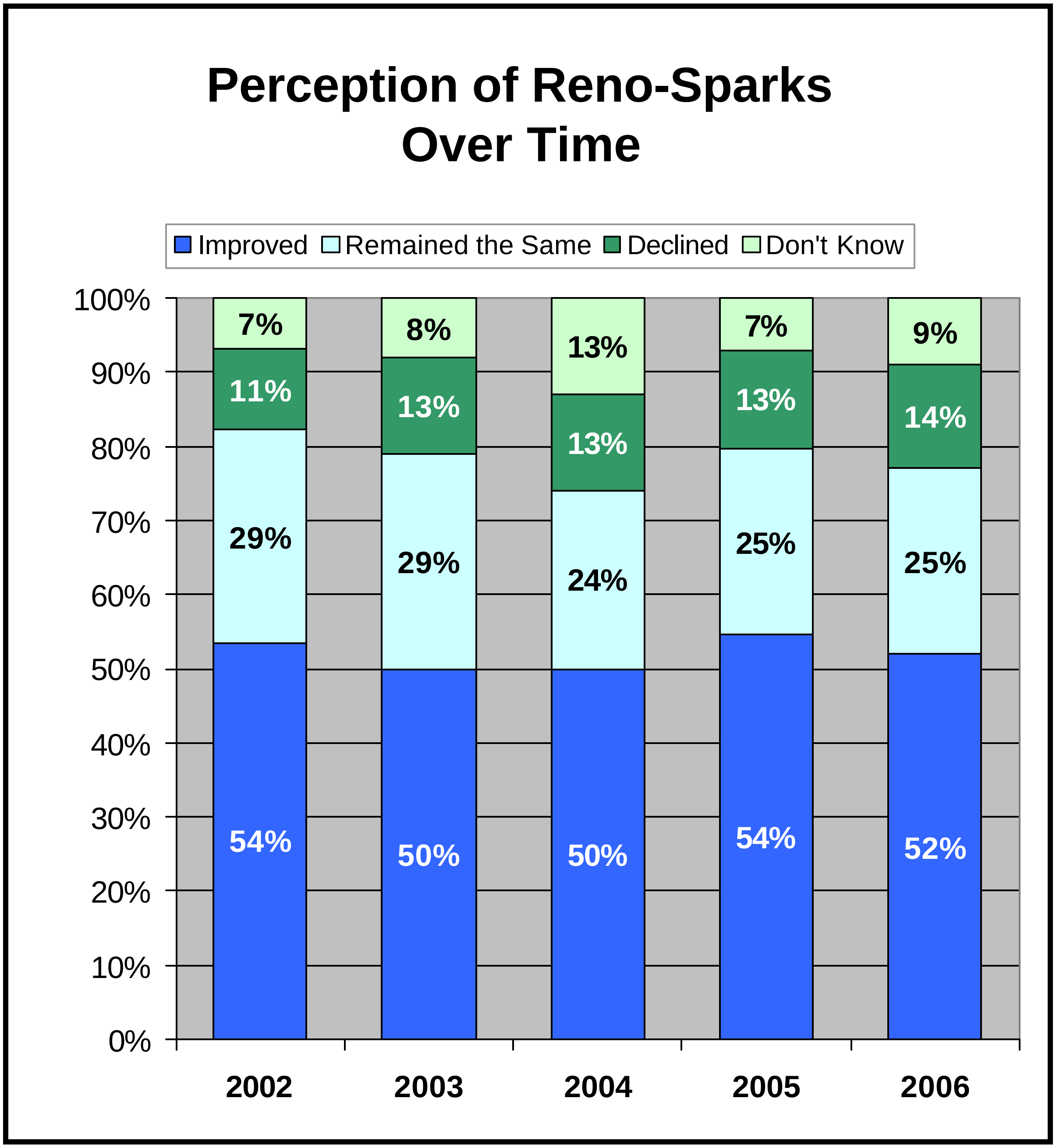


FIGURE 27: PERCEPTION OF RENO-SPARKS

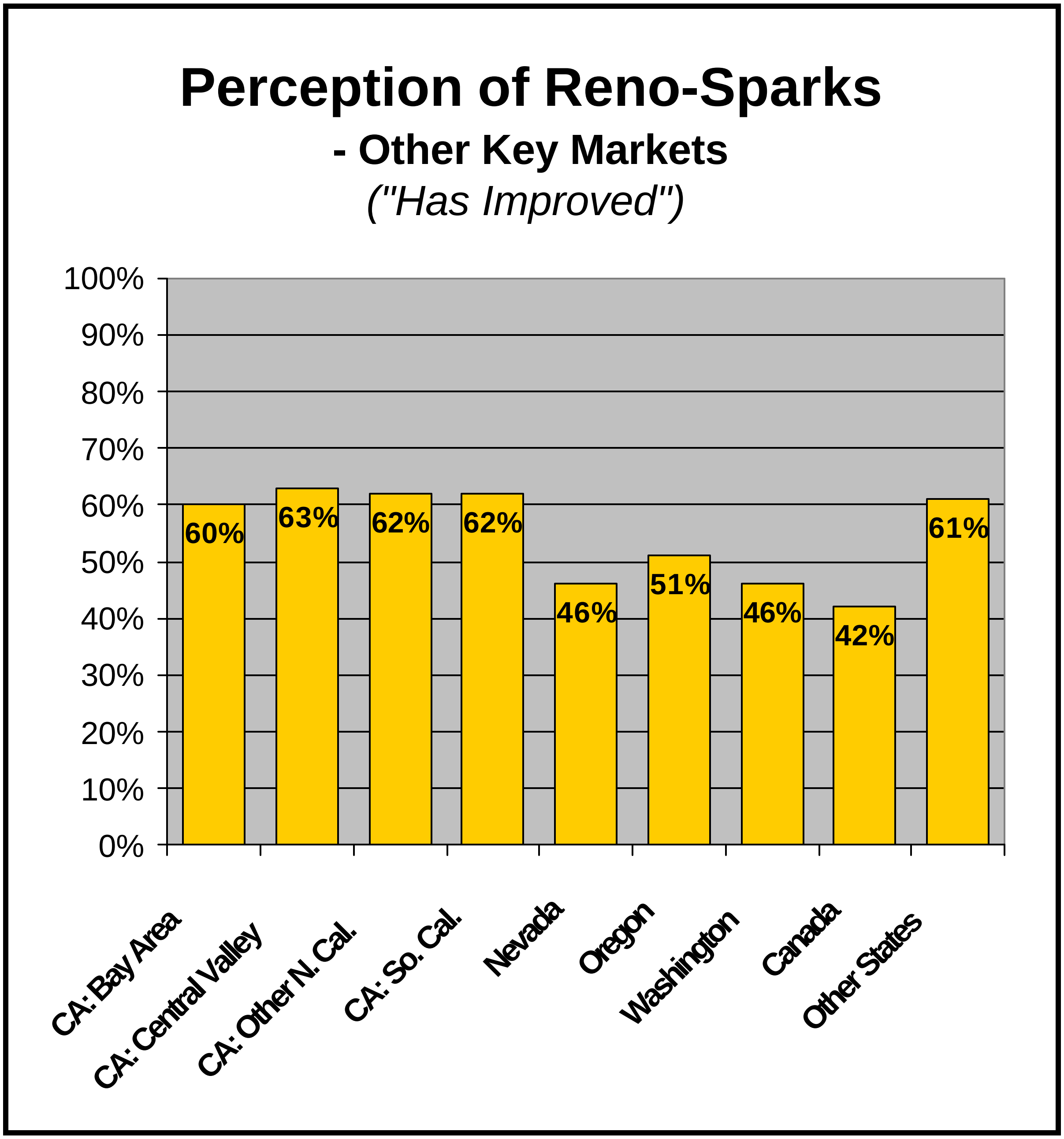
Overall, in 2006, the perception of Reno-Sparks over time remained stable with over half (52%) reporting the area had improved since they had been visiting the area.



* Only repeat visitors were asked about their perception of Reno-Sparks over time.

FIGURE 28: PERCEPTION OF RENO-SPARKS – By Key Markets

In 2006, about three out of five Californians indicated the Reno-Sparks area had improved since they had been visiting. There were no significant differences between California regions. About half (51%) of visitors from Oregon reported the area had improved and nearly half of Nevadans (46%) and visitors from Washington (46%) considered the area to have improved.



* Only repeat visitors were asked about their perception of Reno-Sparks over time.

FIGURE 29: INTENT TO RETURN WITHIN 2 YEARS

As is typical, more repeat visitors (65%) indicated they will definitely return in the next two years than did first-time visitors (17%).

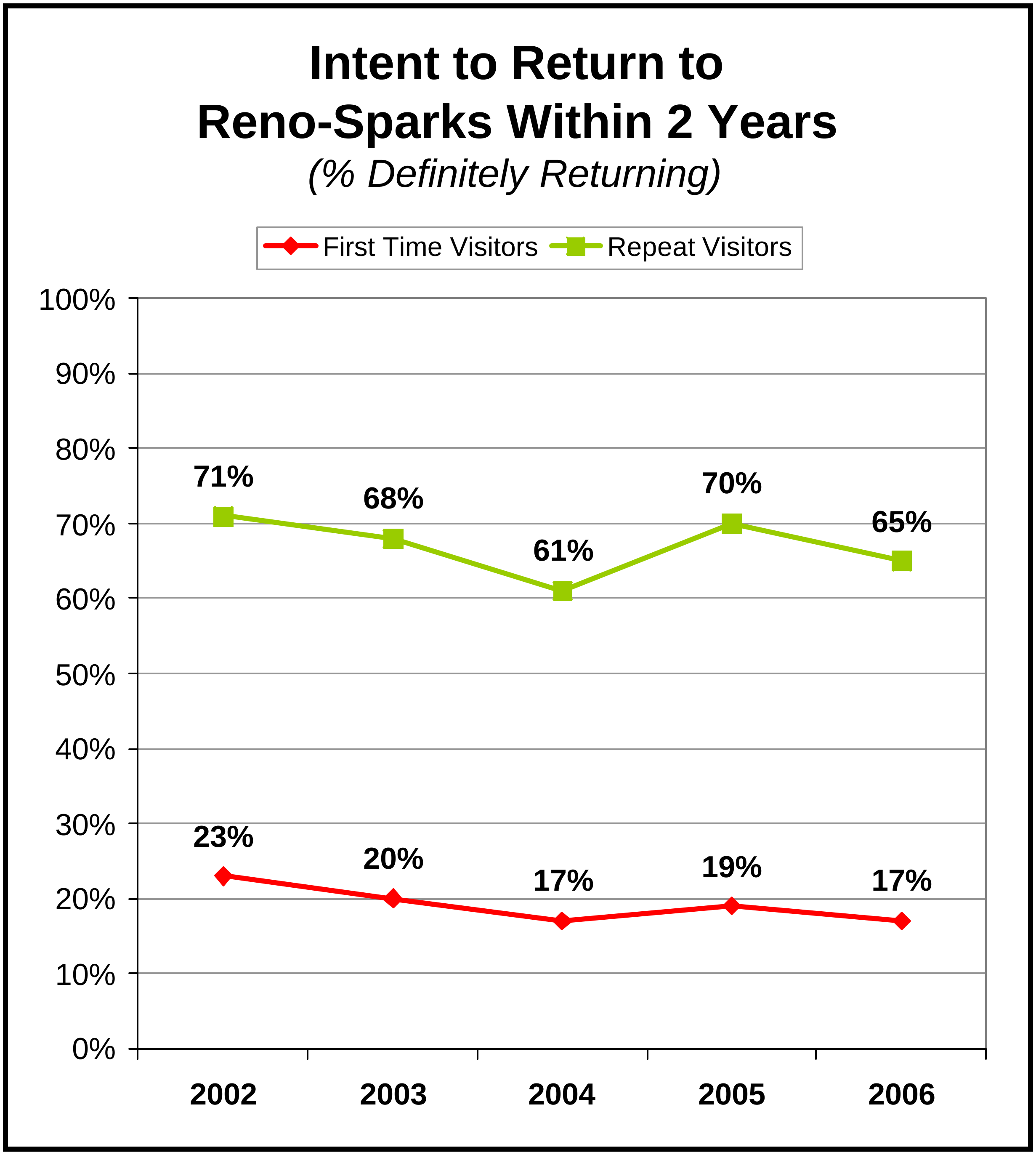


FIGURE 30: INTENT TO RETURN WITHIN 1 YEAR

In 2006, the intent to return to Reno-Sparks in the next 12 months remained stable with 58% of repeat visitors and 10% of first-time visitors indicating they will definitely return.

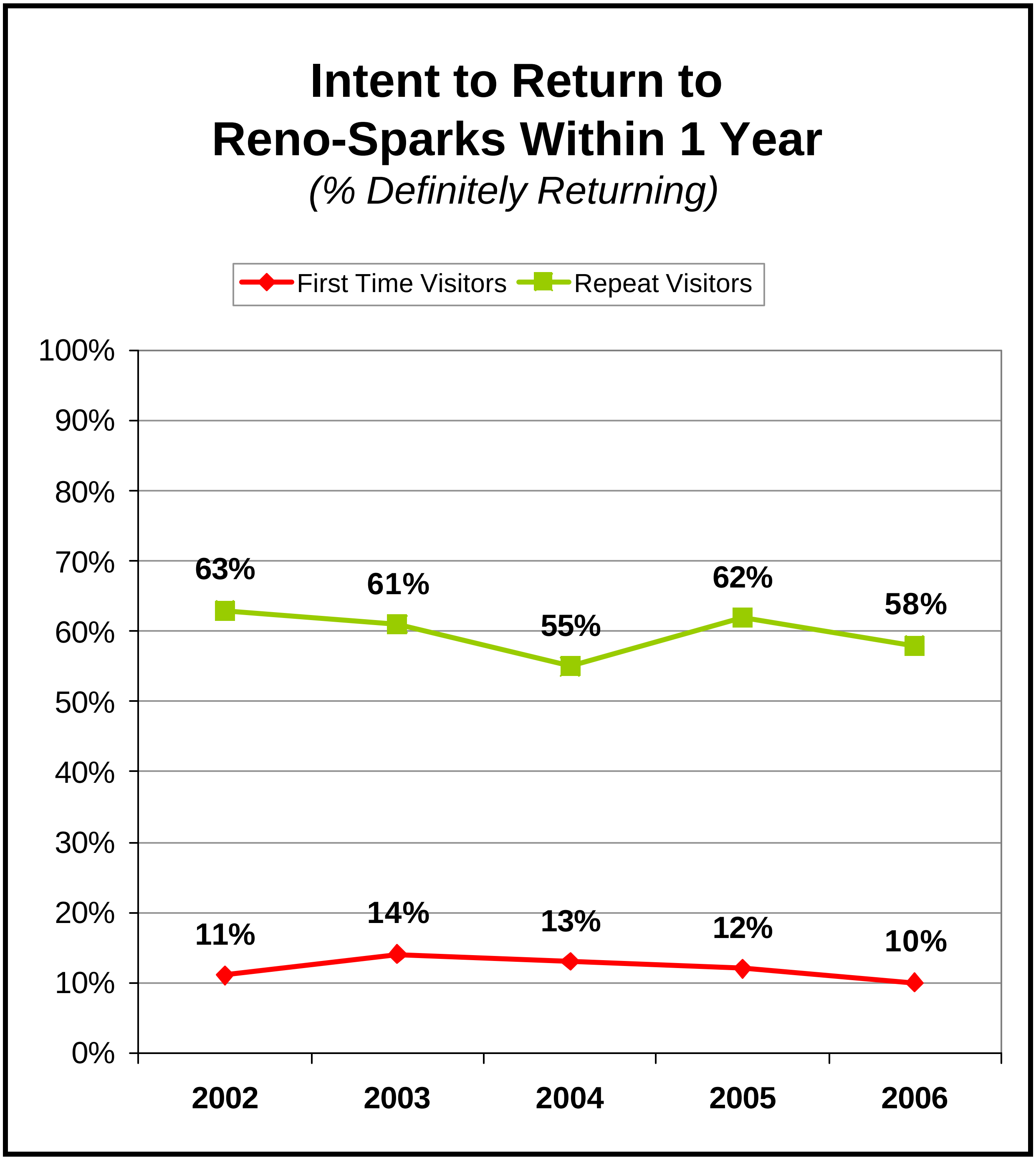


FIGURE 31: INTENT TO RETURN WITHIN 1 YEAR – By Key Markets

Visitors who live closer to Reno-Sparks (i.e., Bay Area, Central Valley, Nevada, other Northern California) were more likely than those from other key markets that were further away (i.e. Southern California, Washington, Canada) to report they would definitely return within the next year.

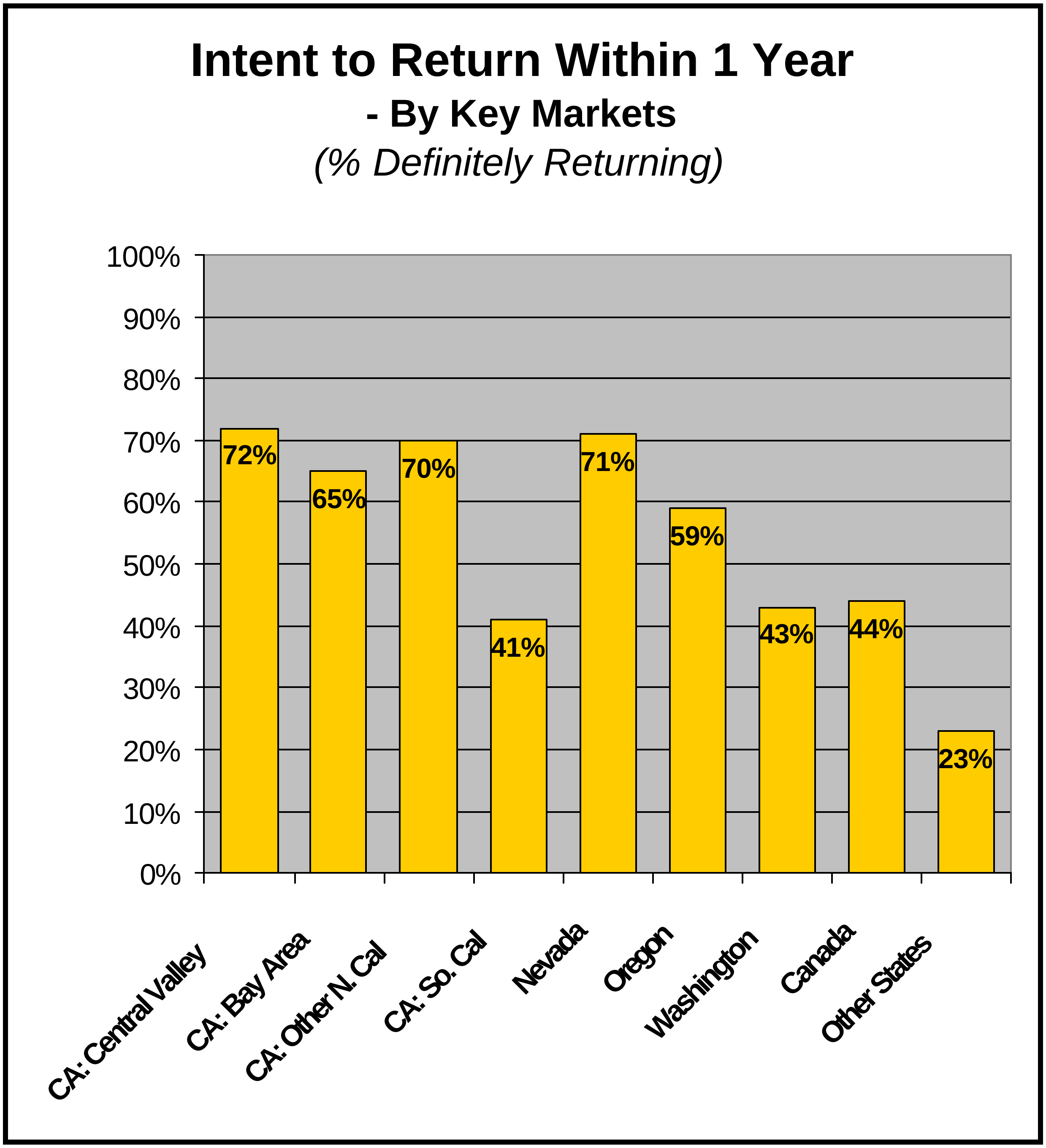


FIGURE 32: PRINCIPAL REASON FOR NOT RETURNING

Other plans, no time, and financial reasons remained the top three primary reasons in 2006 for not returning to Reno-Sparks in the next 12 months.

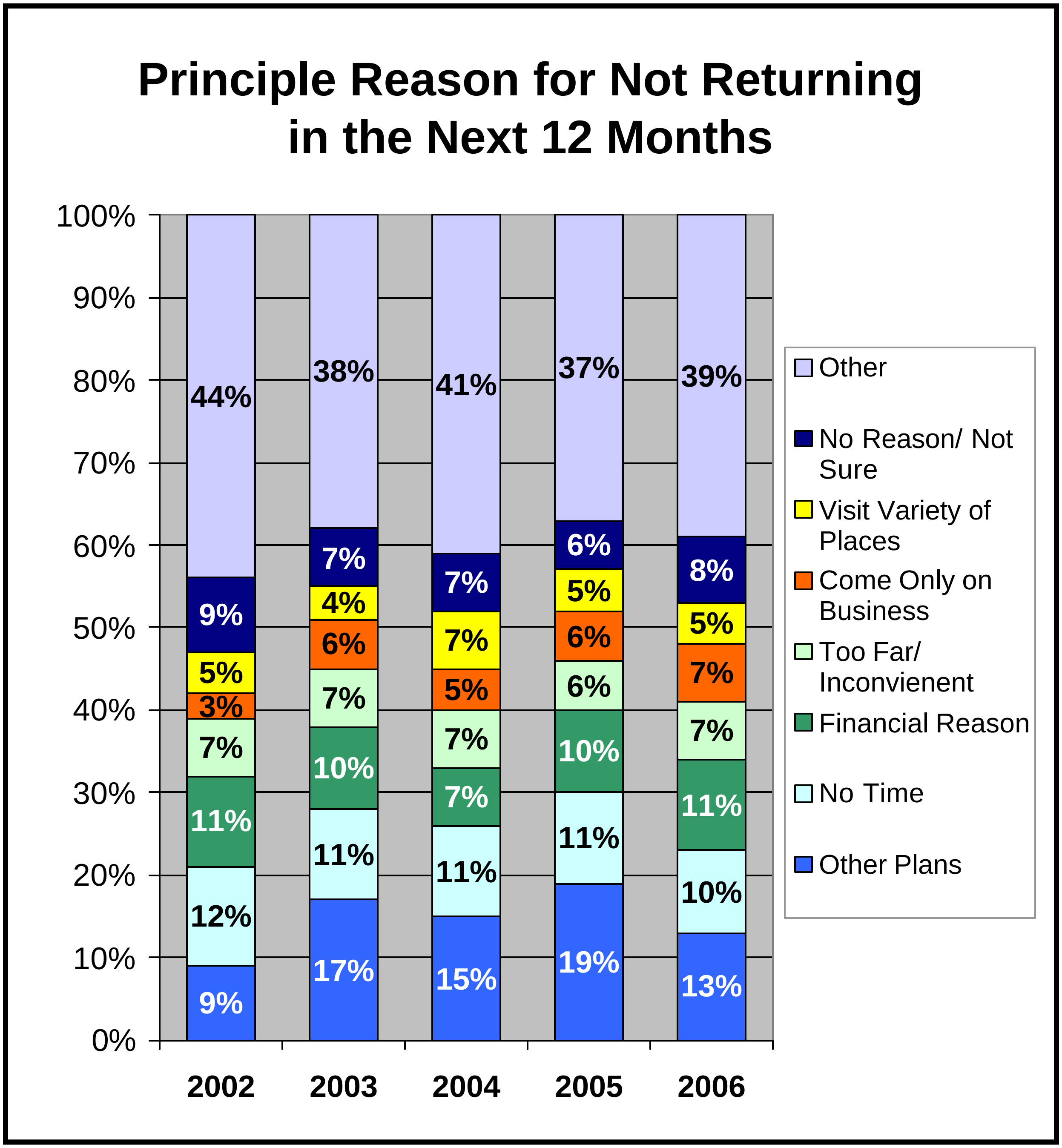


FIGURE 33: ENCOURAGE MORE VISITS

The top three categories in which visitors indicated factors that could encourage more visits to Reno-Sparks were gaming packages and comps (15%), activities (13%), and lodging (12%).

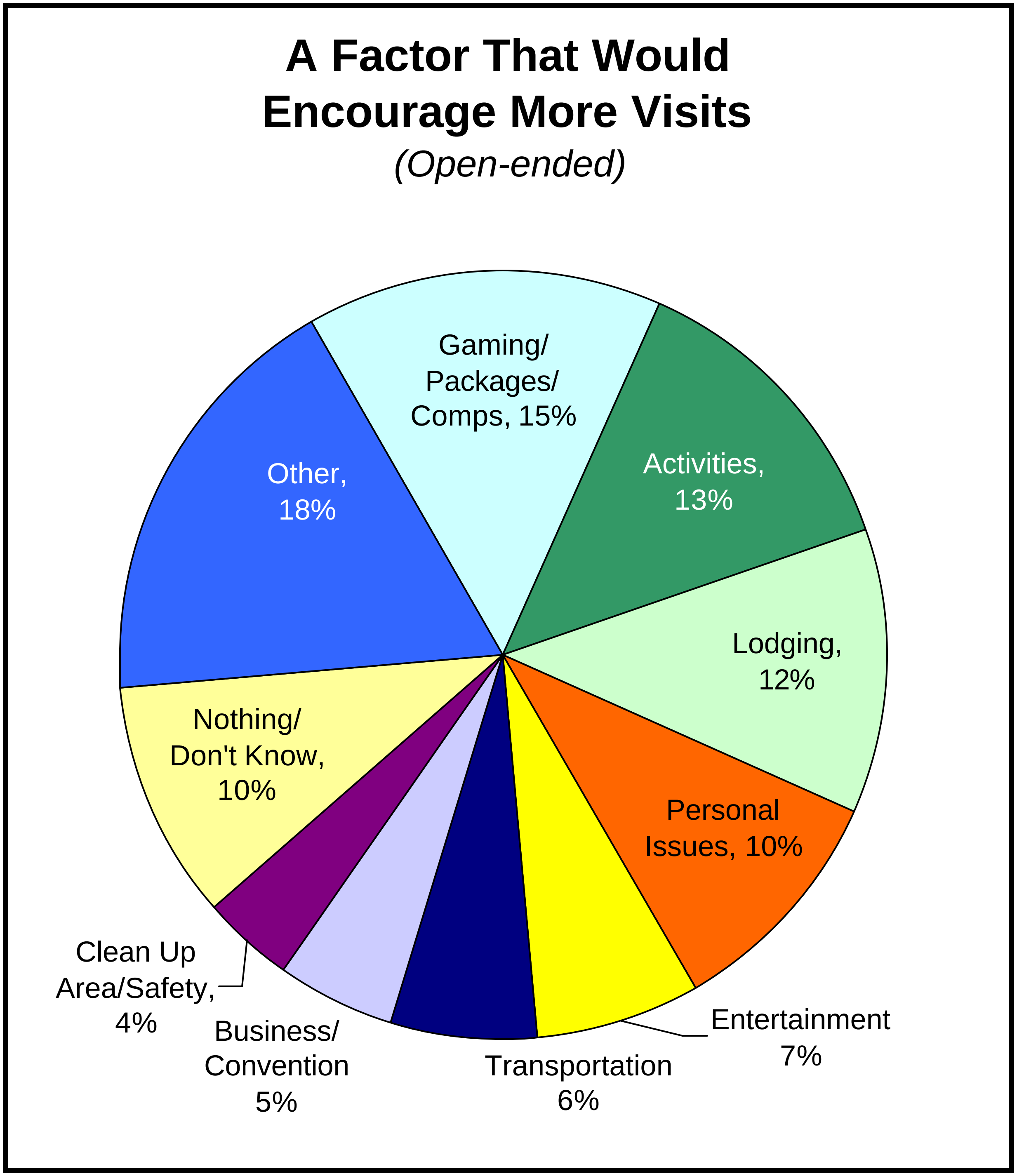


FIGURE 34: TRIPS TO OTHER GAMING DESTINATIONS

In 2006, a total of 38% of all gaming trips made by visitors were to the Reno-Sparks area, another 12% were to California Indian Casinos, and 11% were to Las Vegas.

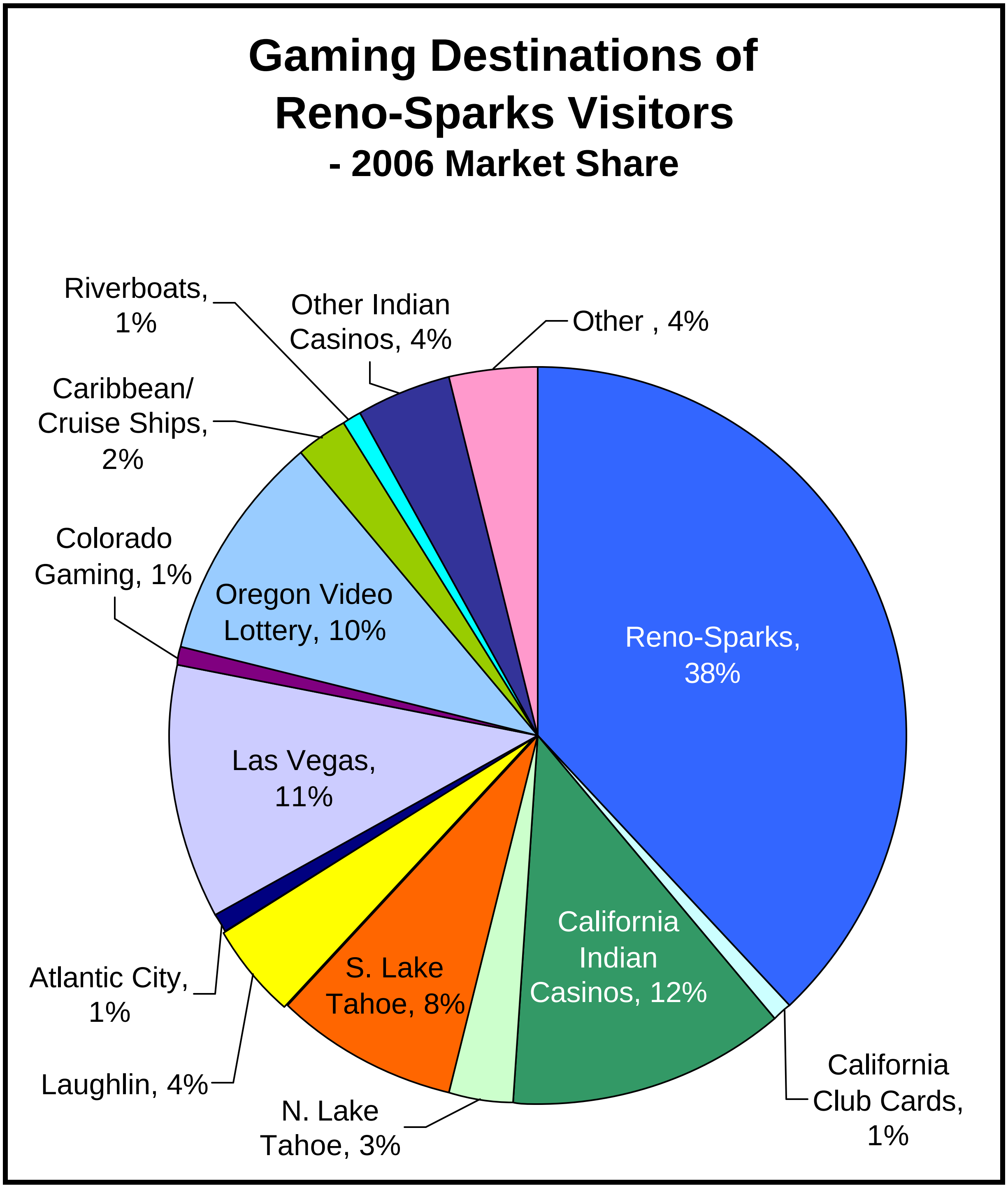
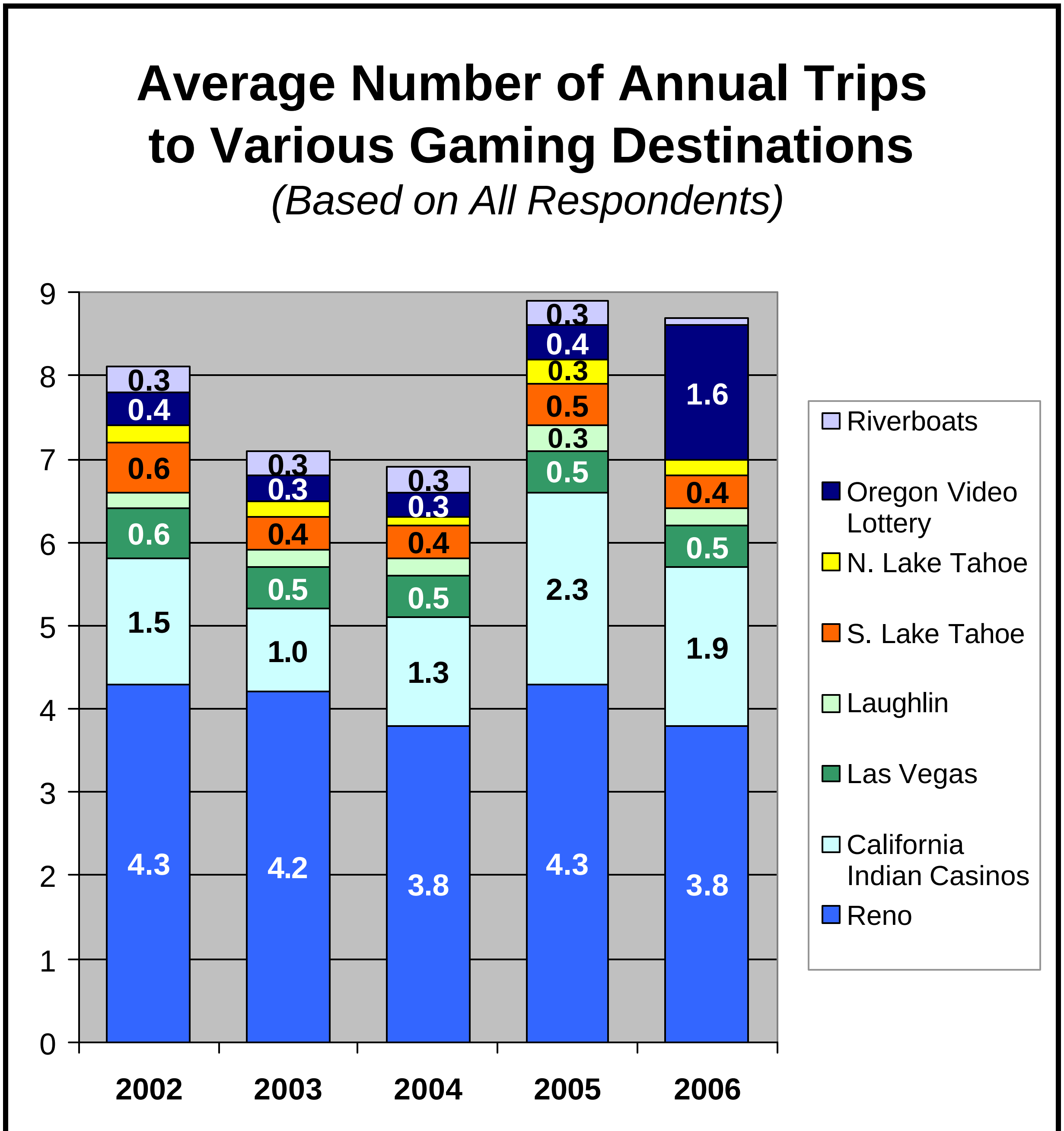


FIGURE 35: TRIPS PER YEAR TO GAMING DESTINATIONS

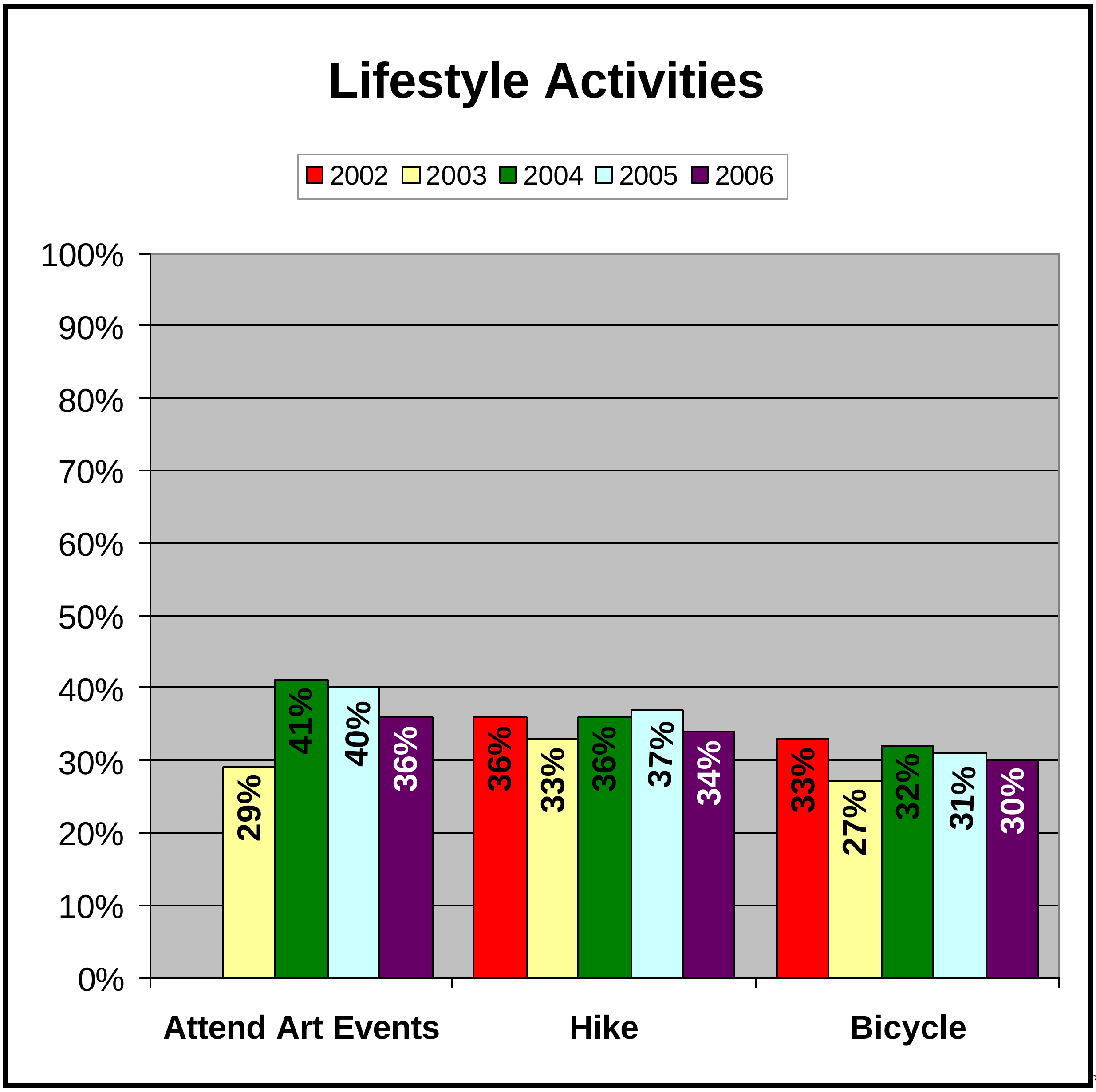
On average, in 2006, Reno-Sparks visitors took more trips per year to Reno than other gaming destinations. California Indian casinos remained the second most popular gaming destination on an average annual trip basis. The average times per year that visitors played Oregon video lottery increased to 1.6 in 2006, up from 0.4 in 2005.



*Respondents averaged less than 0.2 gaming trips to Colorado, Caribbean/Cruise Ships, Atlantic City, Other Indian Casinos, and California Club Cards

FIGURE 36: LIFESTYLE ACTIVITIES – Arts, Hike, Bike

In 2006, about one third of Reno-Sparks visitors indicated attending art events (36%), hiking (34%), and cycling (30%) as part of their lifestyle activities.



*The question was not asked for attending art events in 2002.

FIGURE 37: LIFESTYLE ACTIVITIES – Golf and Bowl

Participation in golf (29%) and bowling (28%) as lifestyle activities remained near 30%.

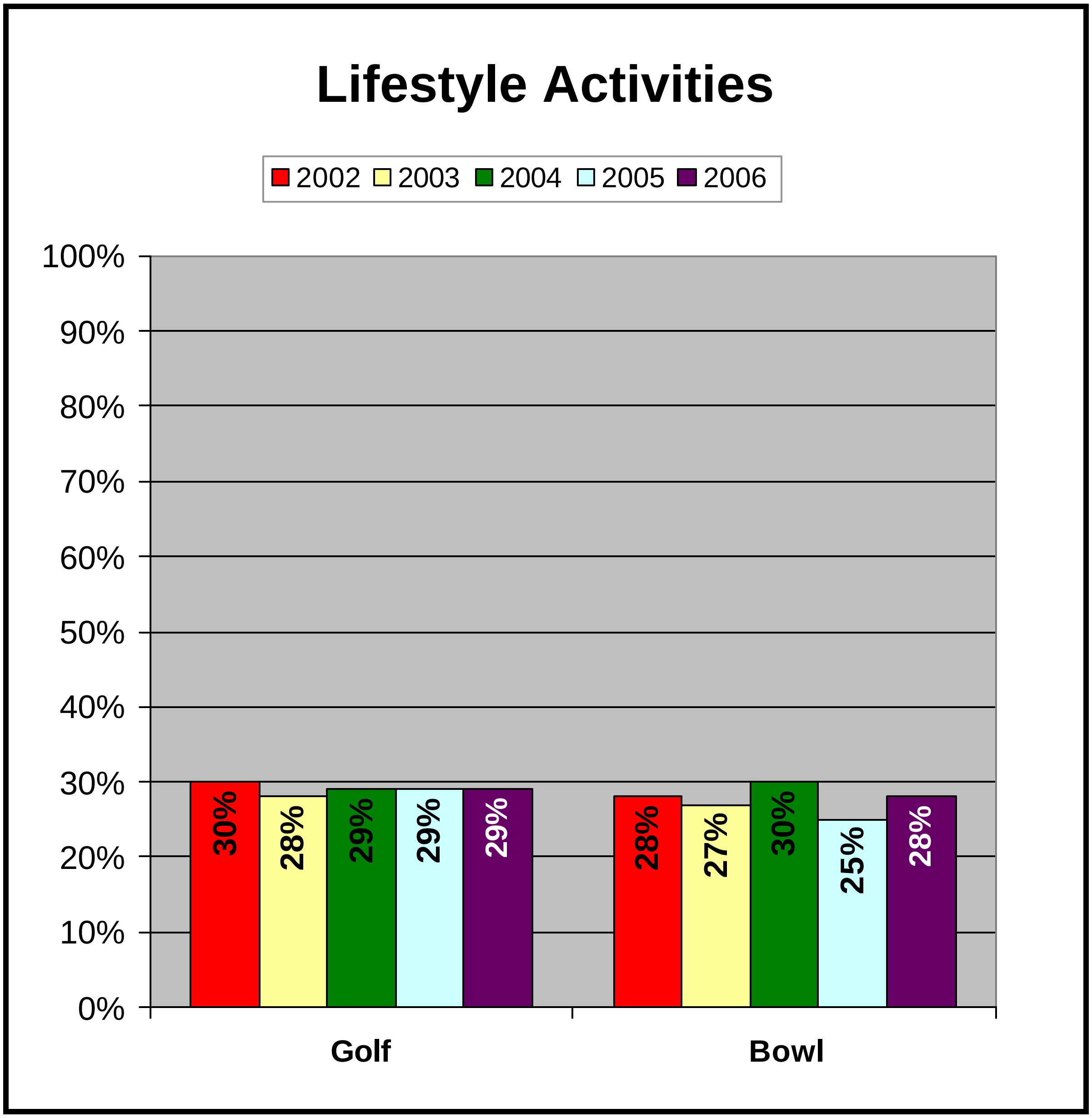


FIGURE 38: INTERNET USAGE

In 2006, nearly four out of five (79%) visitors had internet access. The majority of internet users (91%), 72% of all respondents, had personal email addresses. Also, about 35% of internet users, 27% of all respondents, had visited www.VisitRenoTahoe.com. More than three out of four (77%) visitors who had visited the VisitRenoTahoe.com website discovered it through search engines.

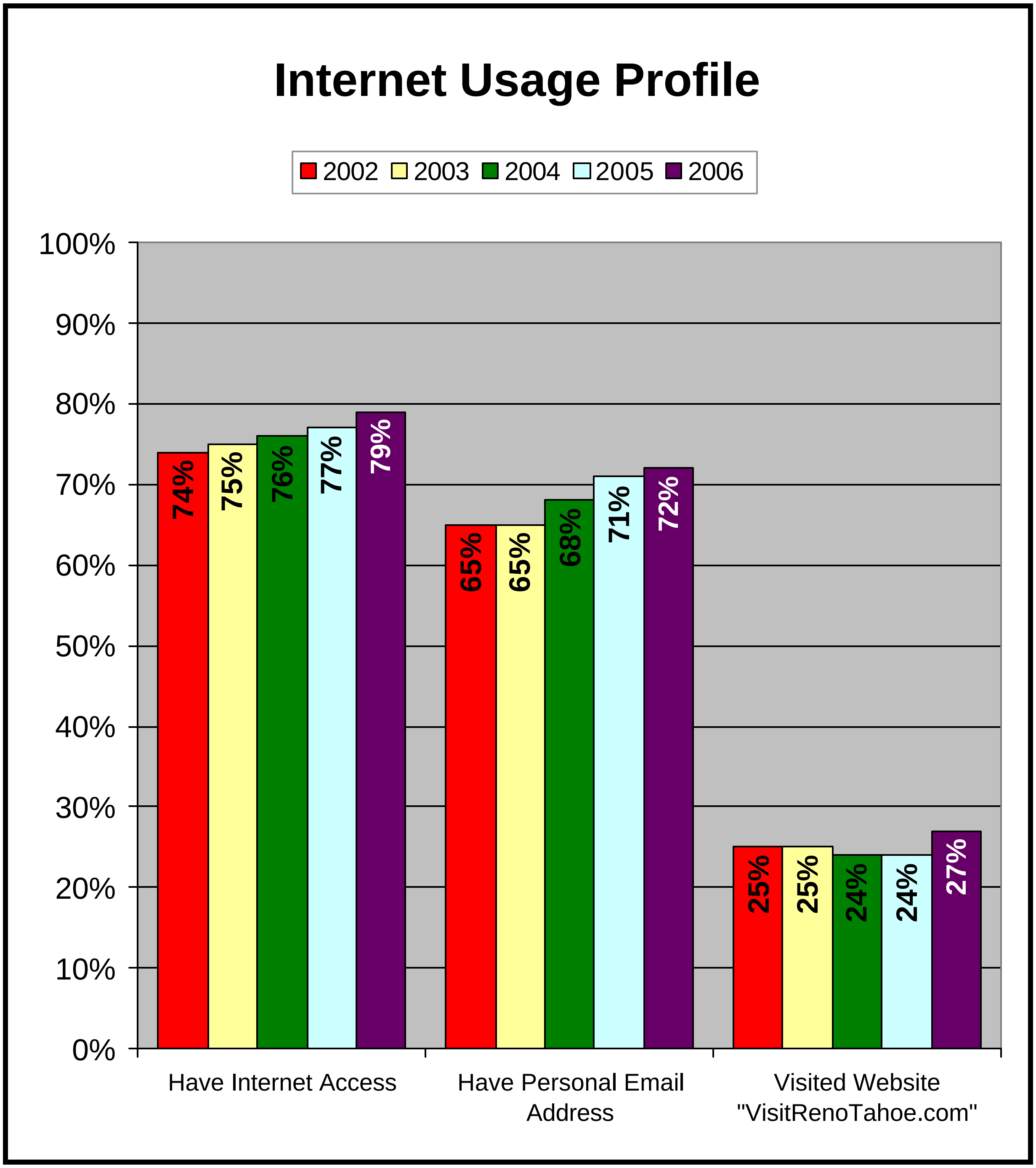


FIGURE 39: TRAVEL INFORMATION SERVICES FROM RSCVA

As expected, receiving travel information or updates through text messaging on cell phones had limited appeal; 6% indicated they were interested in the service – providing a good baseline for continuing research in this area.

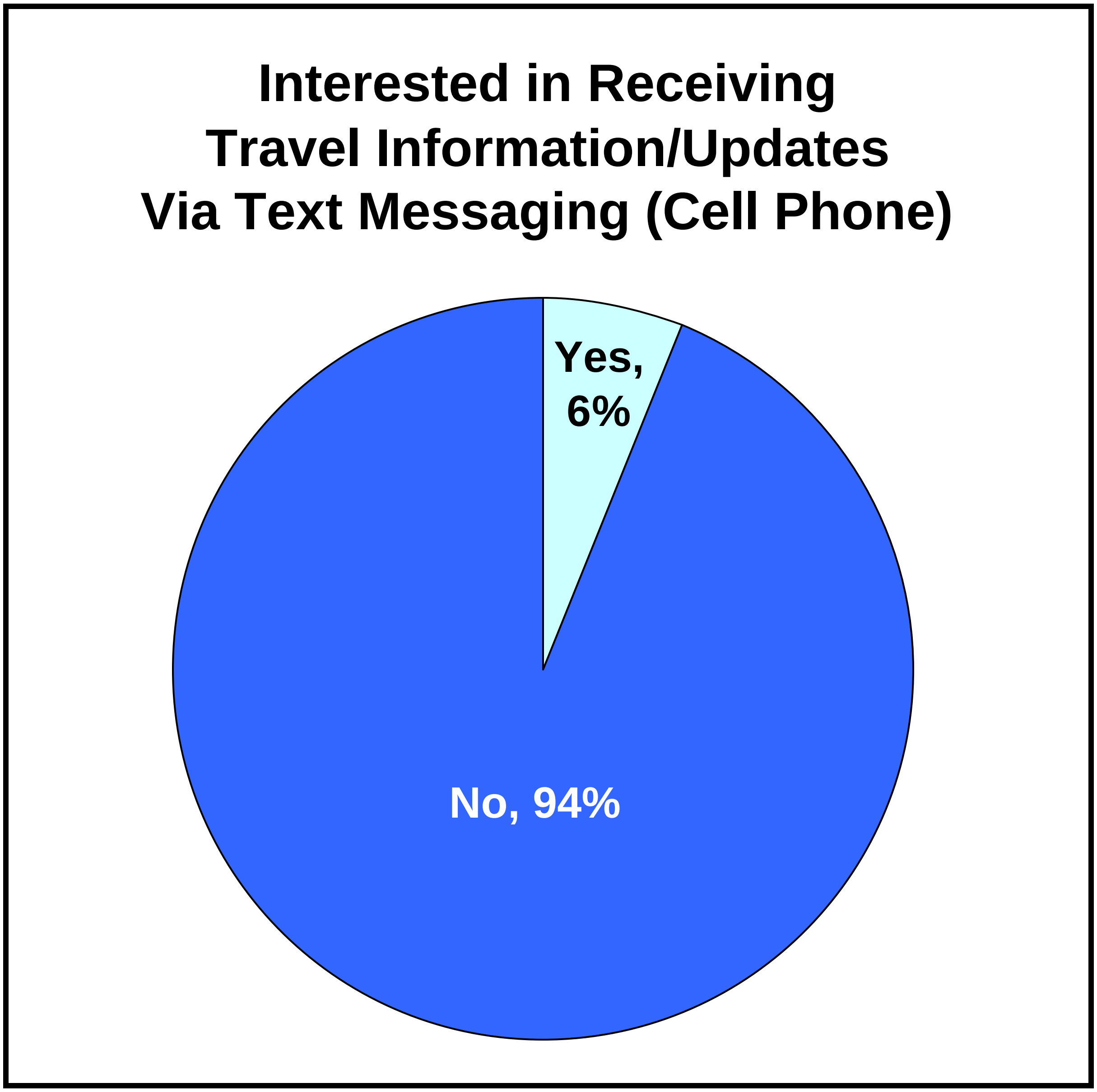
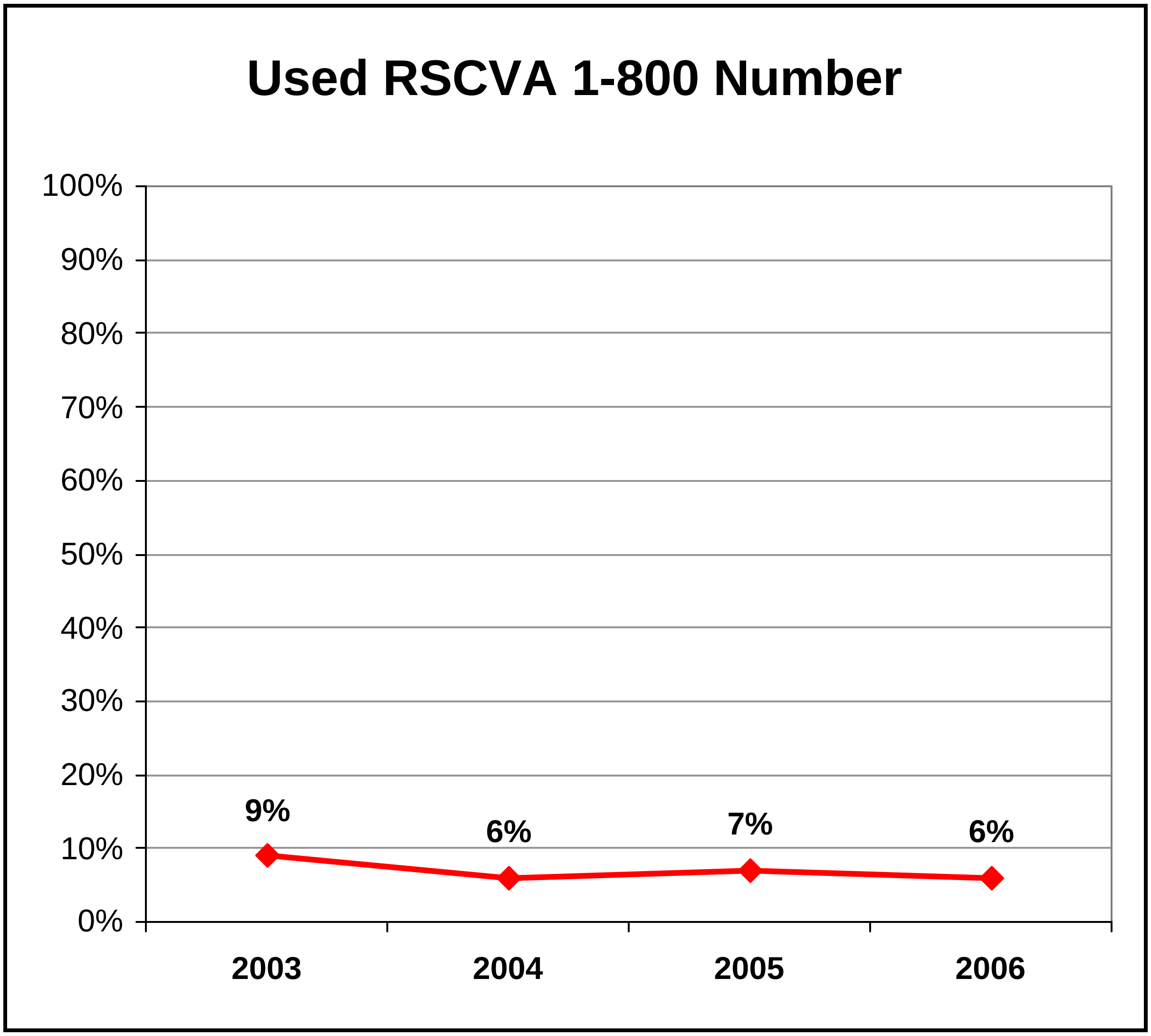


FIGURE 40: AWARENESS OF RSCVA'S TOLL FREE NUMBER

In 2006, one out of five (21%) visitors were aware of the RSCVA 800 Number. About 31% of visitors who were aware of the number, 6% of all respondents, used it.



*The question was not asked in 2002.

FIGURE 41: SLOGAN FAMILIARITY

In 2006, more than one out of seven (15%) visitors reported they were familiar with the Reno-Tahoe slogan. Of the visitors who were familiar, 1% indicated the slogan was "America's Adventure Place."

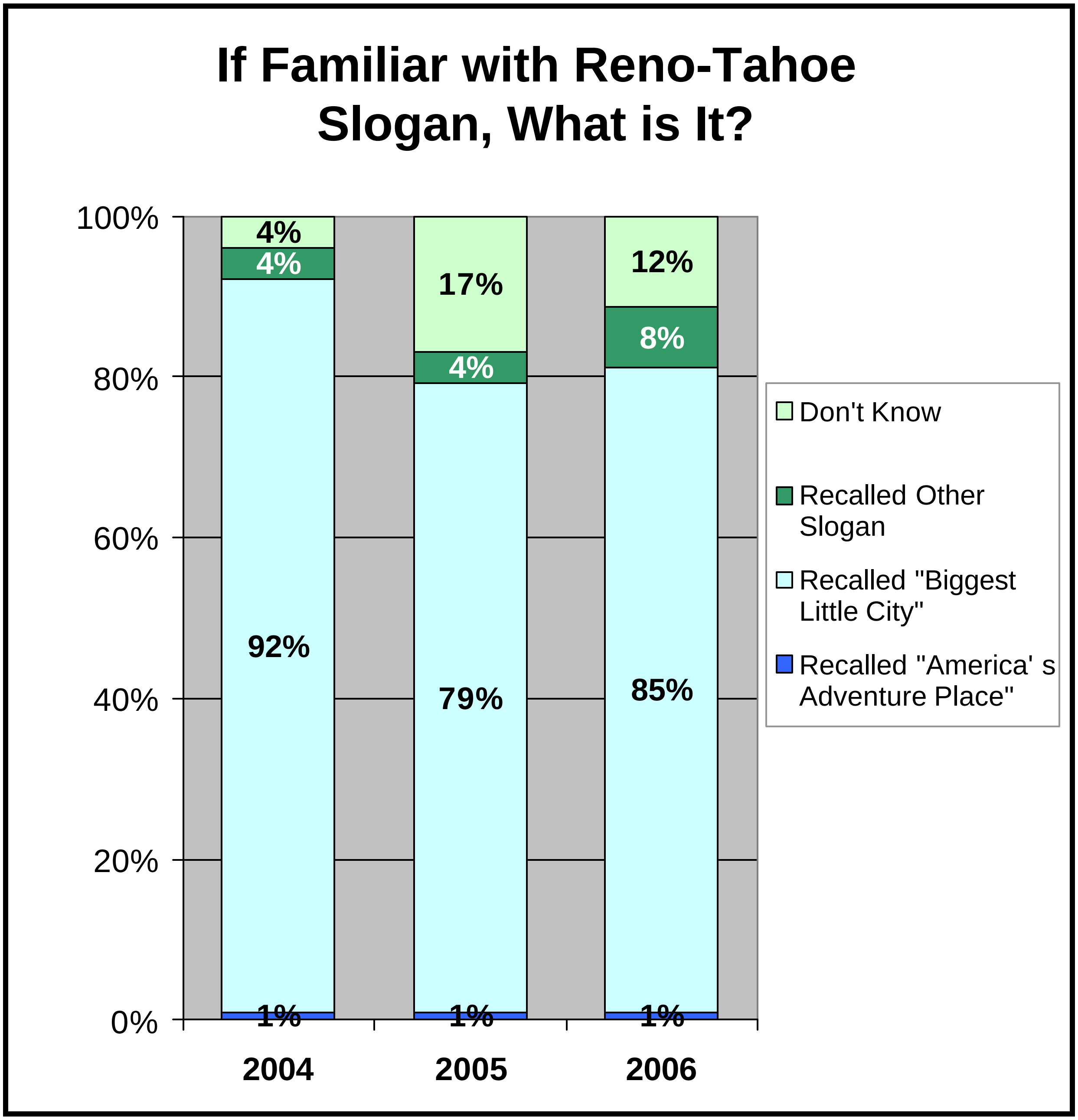
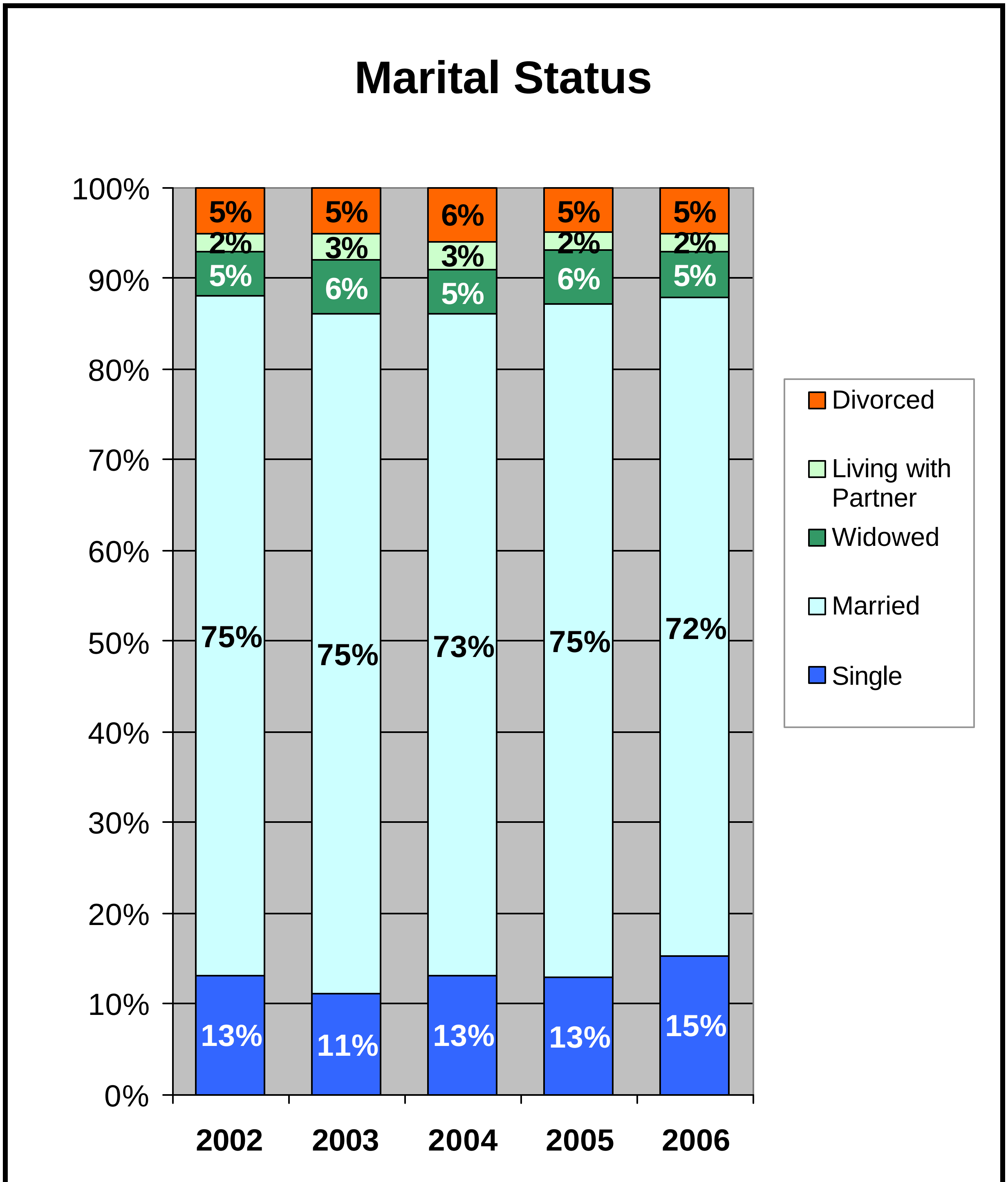


FIGURE 42: DEMOGRAPHICS – Marital Status



*

The values for percentages 2% or less are not shown.

FIGURE 43: DEMOGRAPHICS – Children

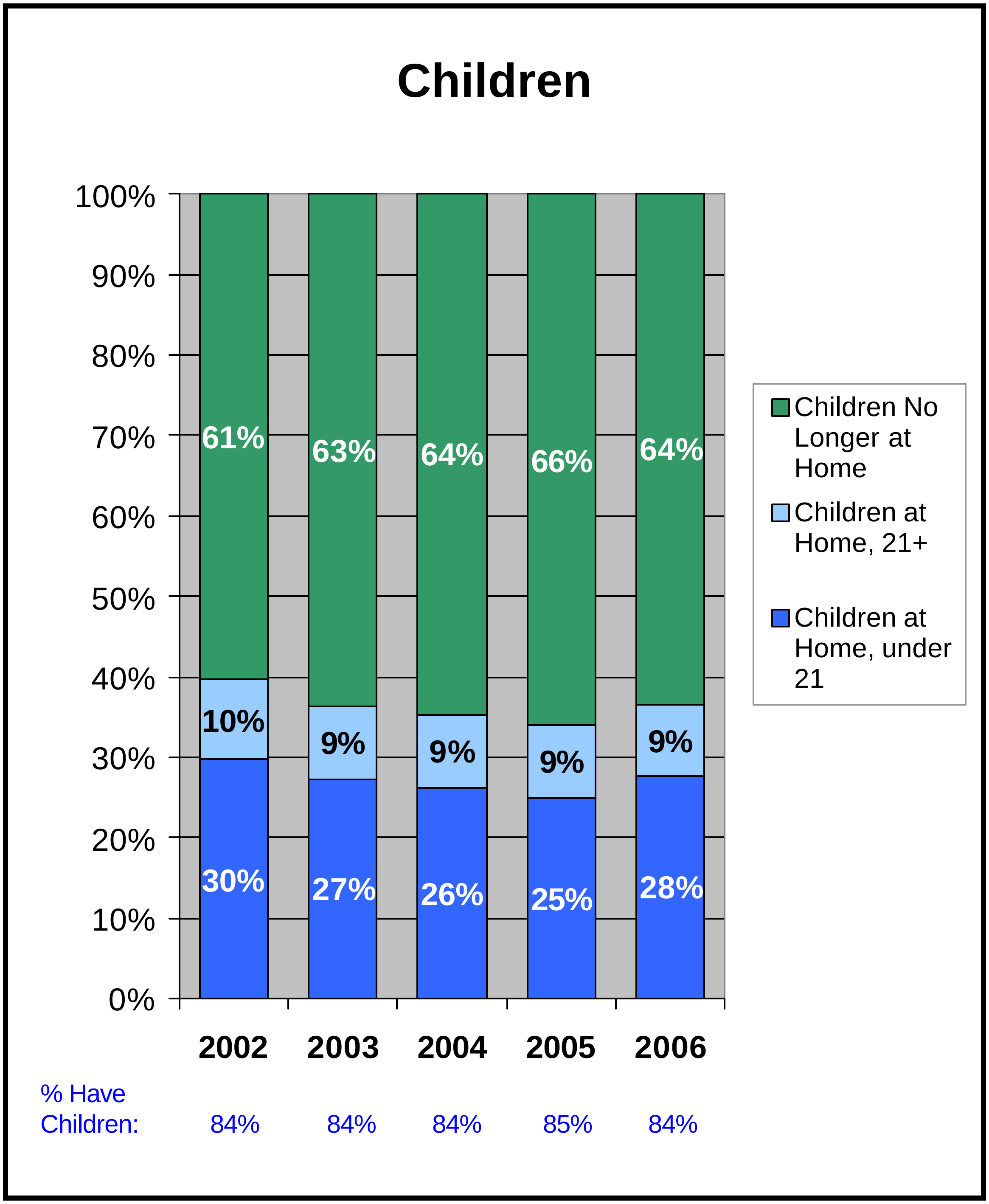


FIGURE 44: DEMOGRAPHICS – Age

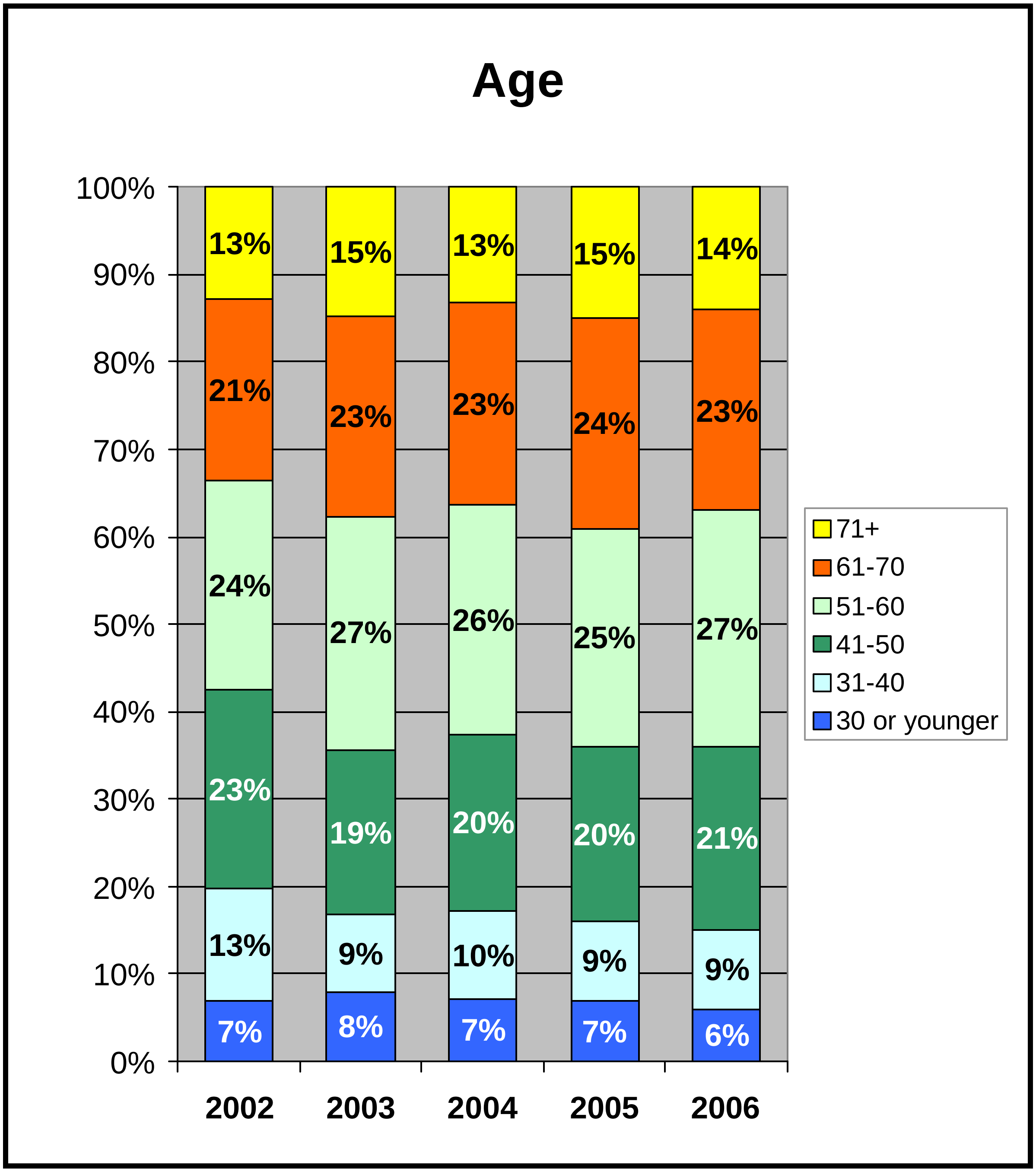


FIGURE 45: DEMOGRAPHICS – Gender of Respondents

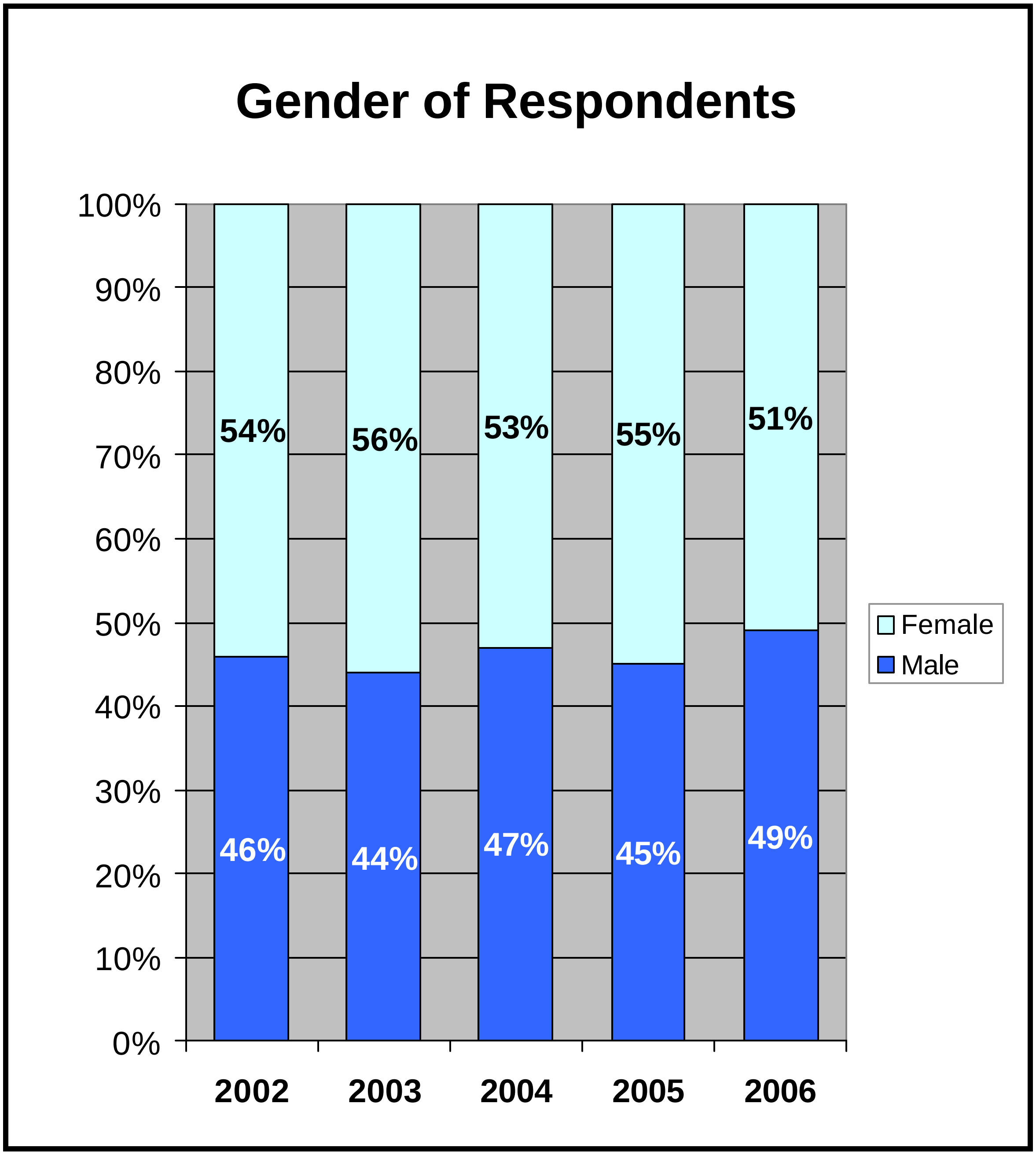
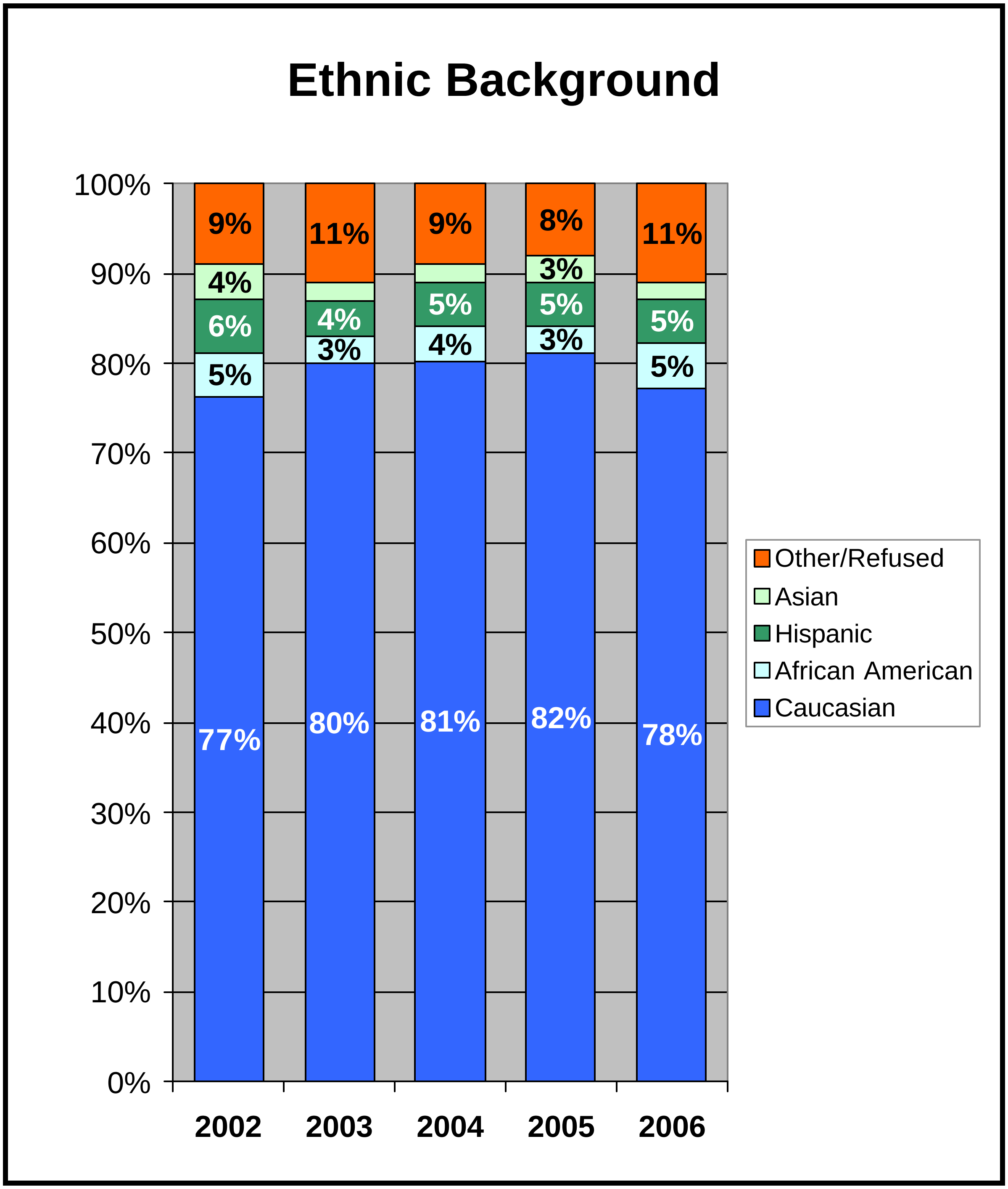


FIGURE 46: DEMOGRAPHICS – Ethnicity



* The values for percentages 2% or less are not shown.

FIGURE 47: DEMOGRAPHICS – Employment Status

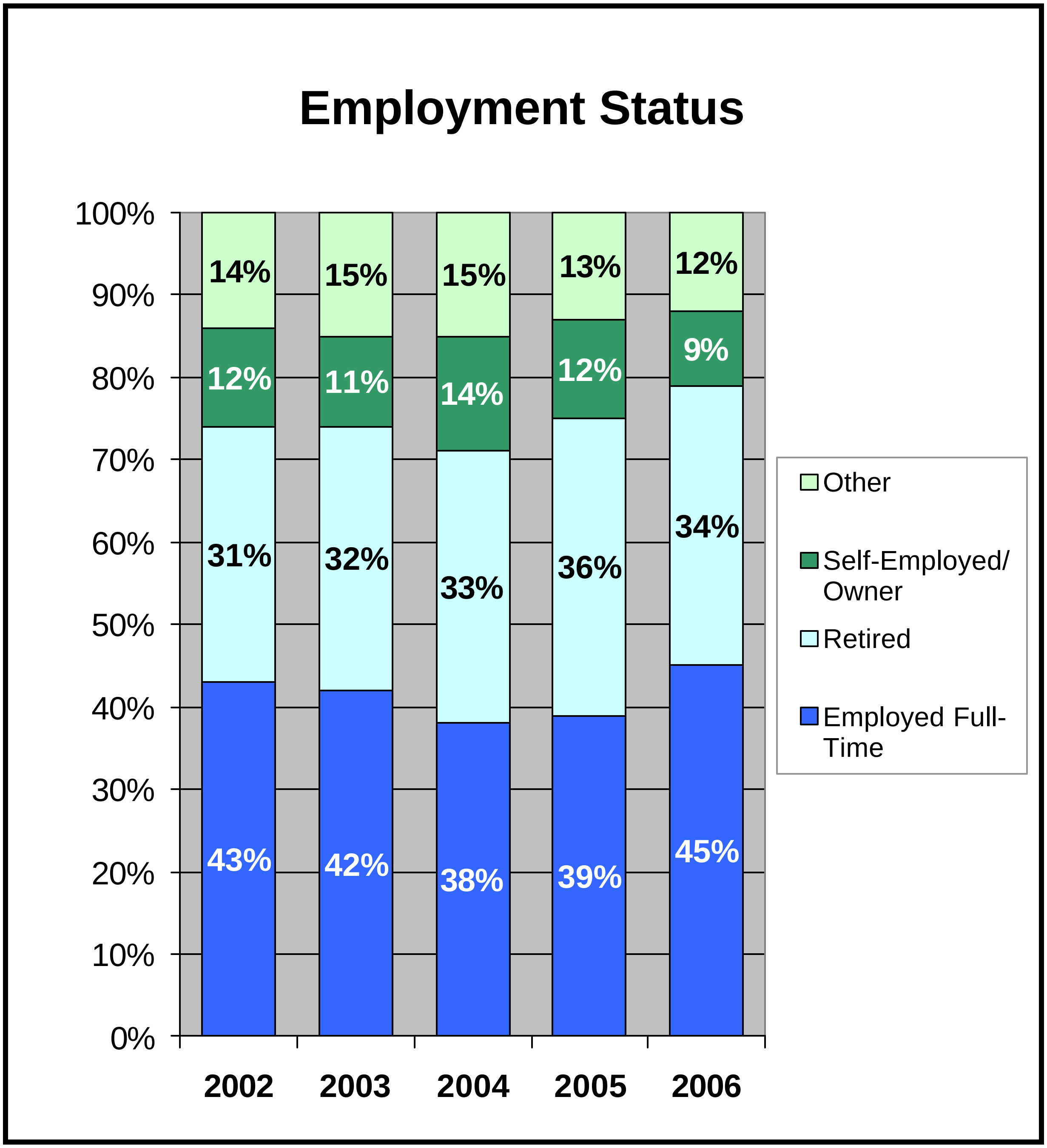


FIGURE 48: DEMOGRAPHICS – Household Income