

Bay Area Core Market Survey *Executive Summary*



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Reno-Sparks Convention and
Visitors Authority

Prepared for:

**Reno-Sparks Convention
& Visitors Authority Board of
Directors**

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Methodology

- ▶ Telephone & Web panel survey of Bay Area residents aged 21 and up
- ▶ 1011 interviews (811 web and 200 phone)
- ▶ Overall margin of error ± 3.1 percentage points
- ▶ Conducted August 13-27, 2012
- ▶ Web panel used primarily, supplemented with phone to provide adequate age and ethnic representation.
- ▶ Previous surveys in August 2010 and February 2011 with same methodology

As with any opinion research, the release of selected figures from this report without the analysis that explains their meaning would be damaging to EMC. Therefore, EMC reserves the right to correct any misleading release of this data in any medium through the release of correct data or analysis.

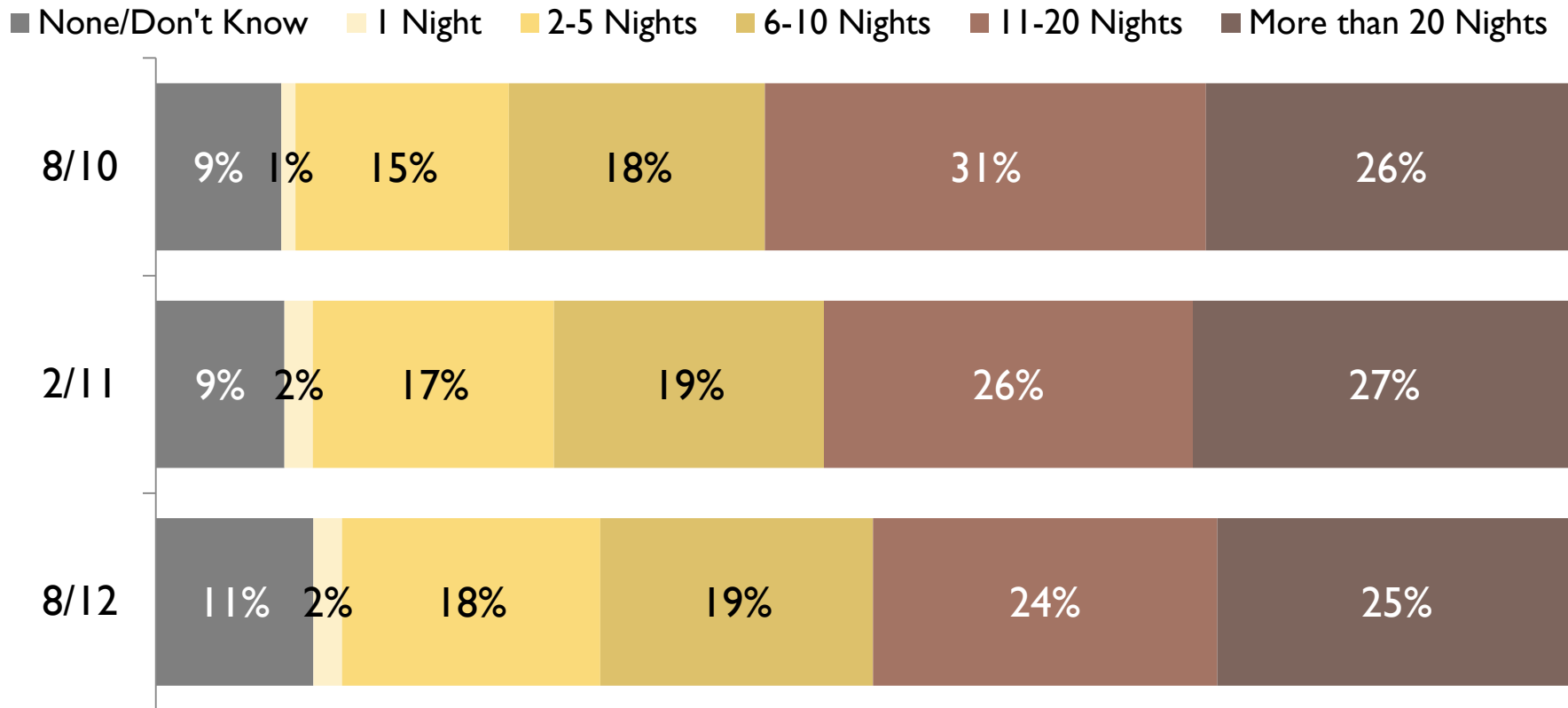
Please note that due to rounding, percentages may not add up to exactly 100%

Conclusions

- ▶ Awareness and opinions of the Reno area have remained consistently positive, despite fluctuations in media spending.
- ▶ There are slight increases in the brand rating among the target audience – an indication that advertising is reaching the correct demographic.
- ▶ Overall nights of leisure travel is down compared to previous years, but Reno is well-positioned as a getaway destination for Bay Area visitors when travel starts to increase.
- ▶ Inconsistent ad spending, messaging and tracking makes it difficult to analyze the impact of the most recent campaign but brand attributes have remained consistently strong despite fluctuations in spending and messaging.

There is a slight trend showing fewer nights spent on personal travel over the last few years

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



Lake Tahoe continues to be the most commonly mentioned getaway location

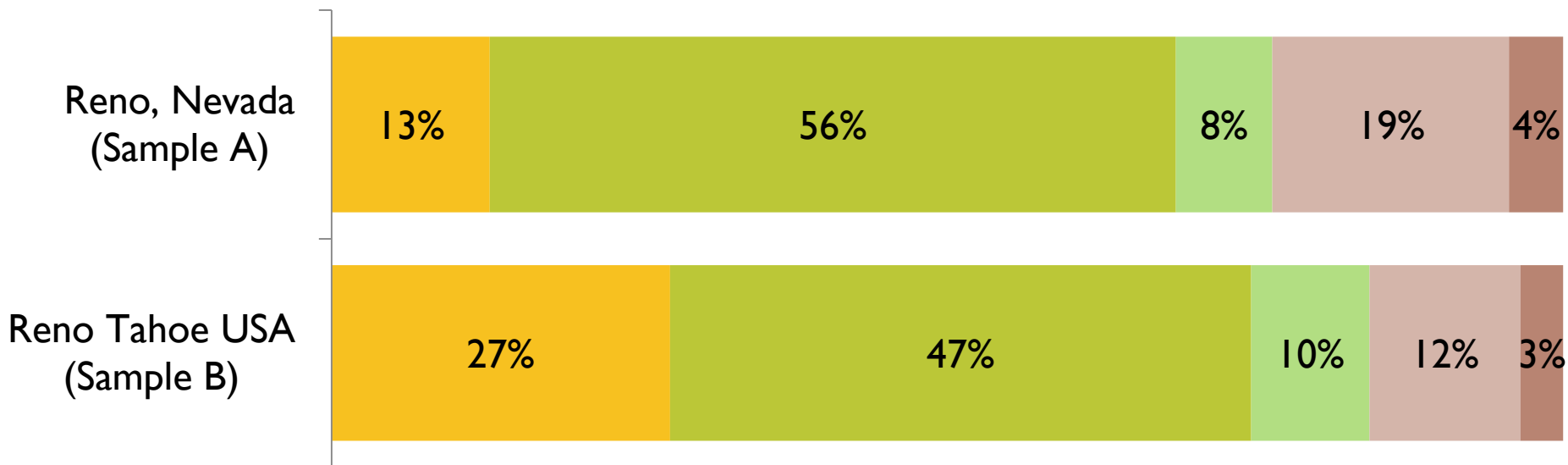
*When you think about getaways or short trips, what places come to mind? (Q4)
(Most frequently mentioned. All responses included)*

		<u>8/10</u>	<u>2/11</u>	<u>8/12</u>
1	Lake Tahoe	27%	29%	23%
2	Las Vegas	20%	19%	20%
3	Monterey	20%	18%	15%
4	Napa/Napa Valley	19%	15%	15%
5	Los Angeles	10%	11%	12%
6	Hawaii	12%	11%	10%
7	San Francisco	10%	11%	10%
8	Reno	8%	8%	8%
9	Santa Cruz	7%	6%	8%
10	San Diego	9%	6%	8%

Reno Tahoe USA is a very positive brand in the Bay Area

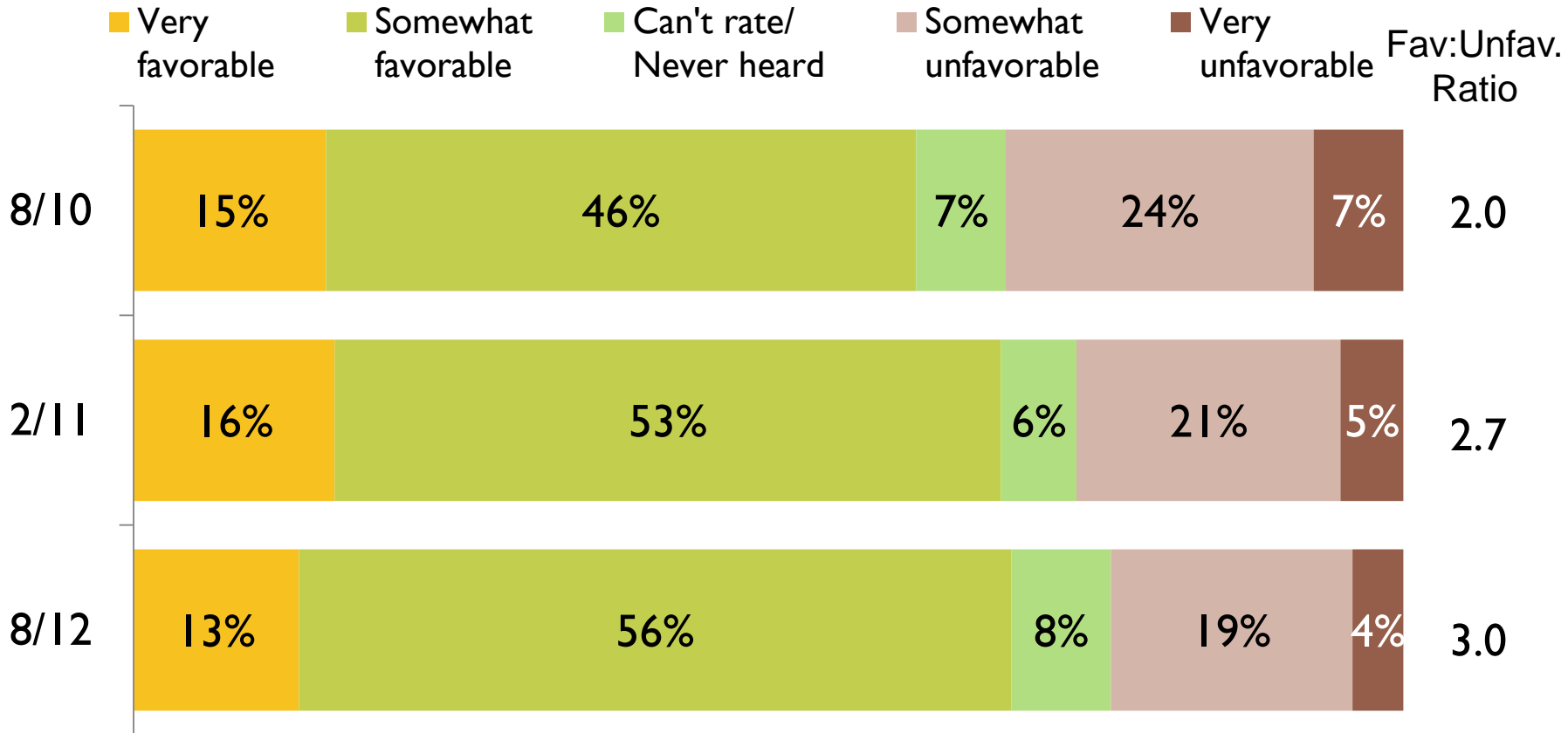
Please rate your opinion of...(Q5 & Q6)

Very Favorable Somewhat Favorable Can't rate/ Never heard Somewhat Unfavorable Very Unfavorable



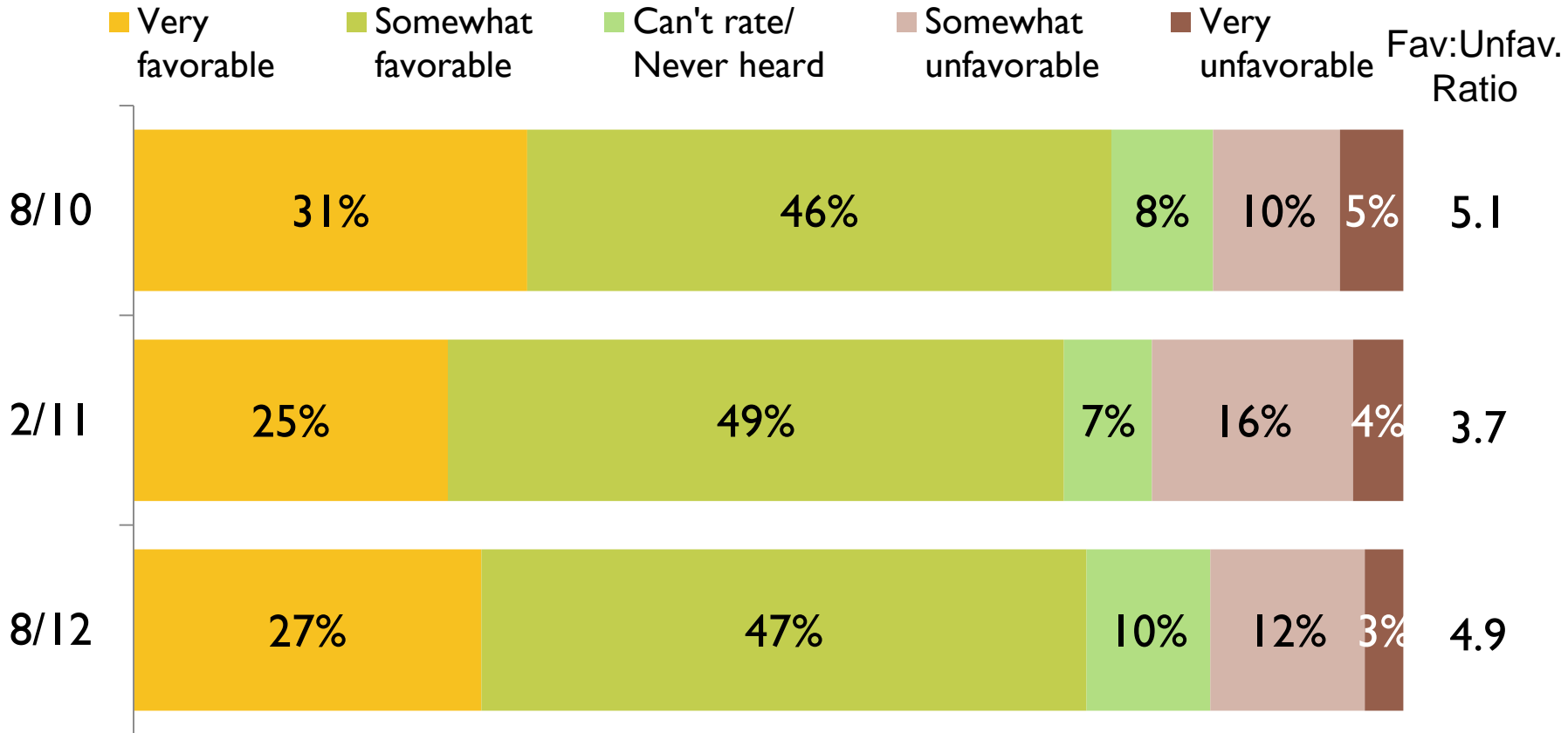
Reno's favorable to unfavorable ratio continues to increase slightly

Please rate your opinion of **Reno, NV**



Ratings of the Reno Tahoe, USA brand are fairly consistent with 2011 and continue to be positive

Please rate your opinion of **Reno Tahoe, USA**

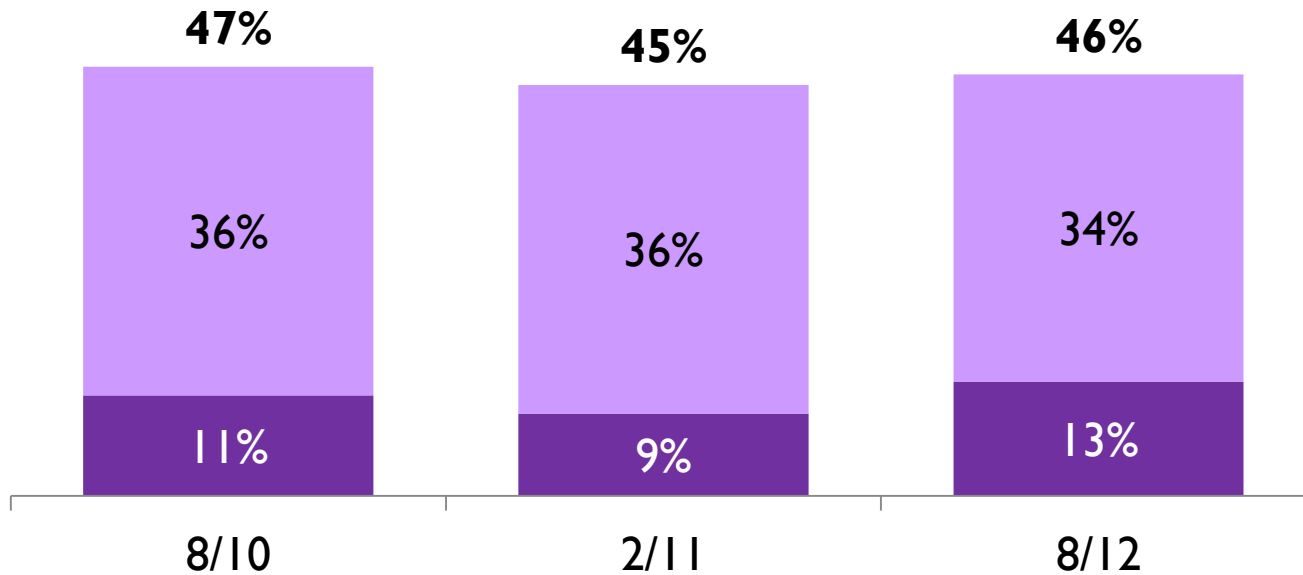


Awareness of Reno remains fairly constant

Have you heard or read anything lately about Reno? (Q7)

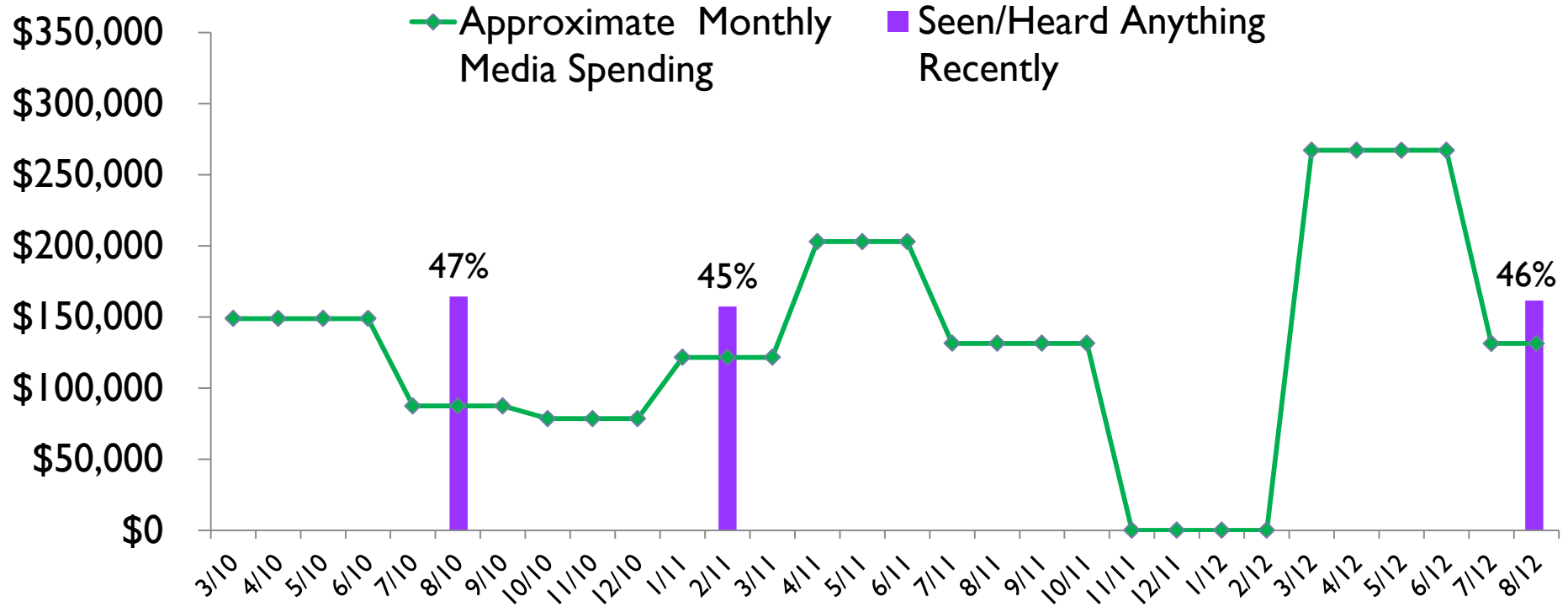
■ Yes, heard a lot

■ Yes, heard a little



Monthly media spending has fluctuated

Have you heard or read anything lately about Reno? (Q7)



Total Media Spending

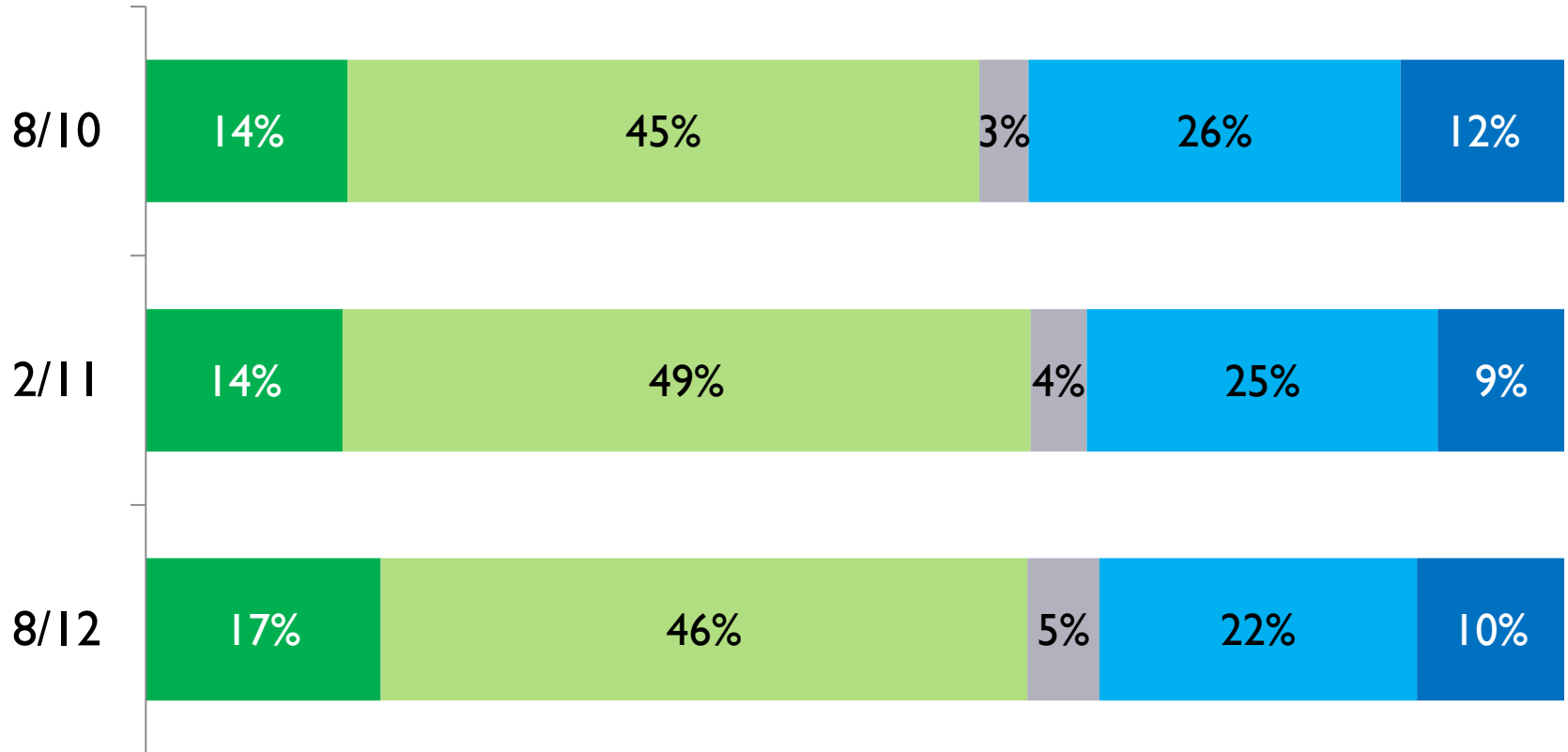
March- June 2010: \$595,208	July-Sept. 2010: \$262,204	Oct.-Dec. 2010: \$235,315	Jan.-March 2011: \$364,554	April-June 2011: \$608,800	July-Oct. 2011: \$524,570	Nov. 2011- Feb. 2012 : \$0	March 12, 2012- June 24, 2012 : \$1,068,318	July-Oct. 2012 : \$525,570
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Interest in visiting Reno has remained constant, although intensity is up slightly

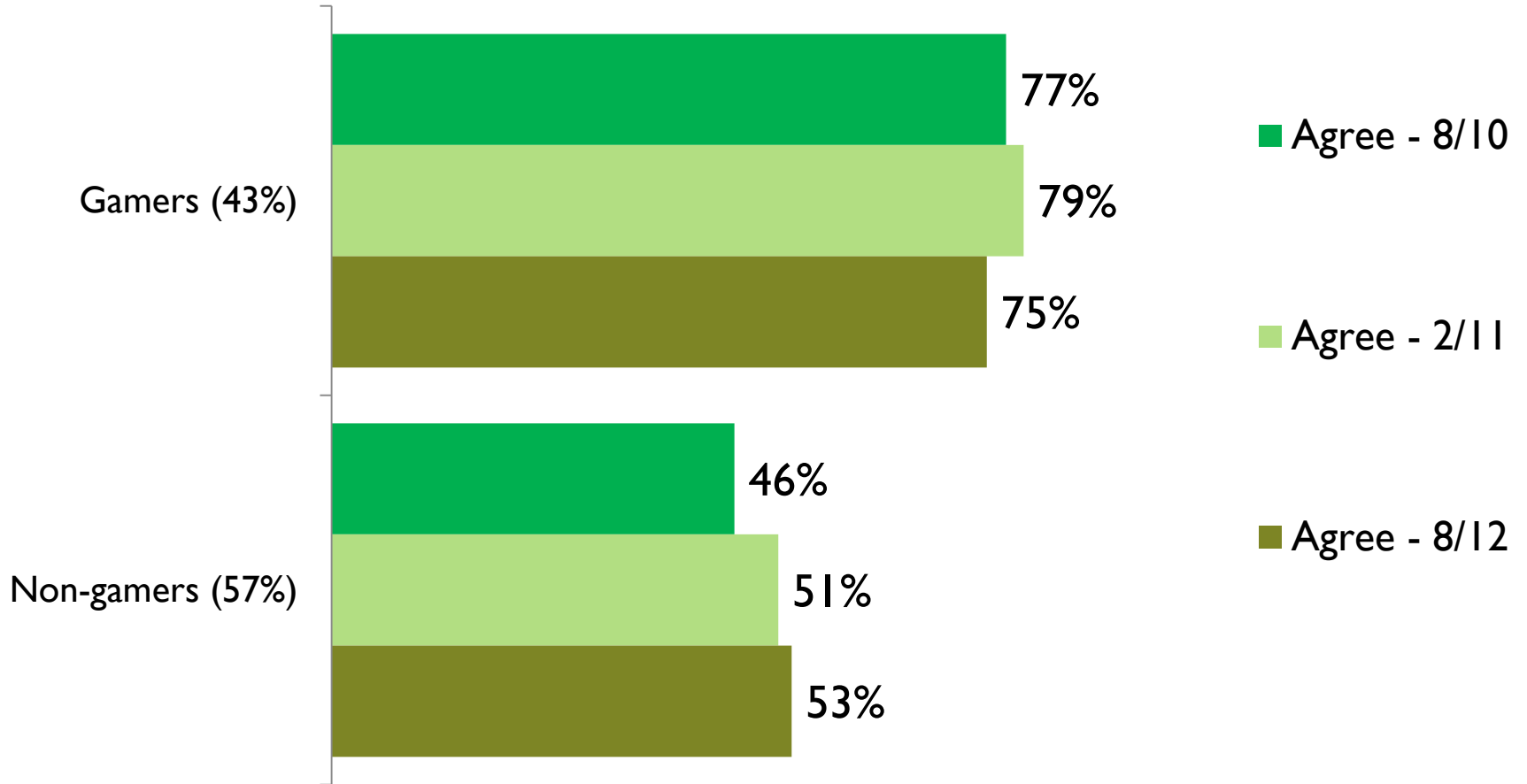
Do you agree or disagree: Reno is a place I want to visit? (Q10)

■ Strongly Agree ■ Somewhat Agree ■ Don't Know ■ Somewhat Disagree ■ Strongly Disagree



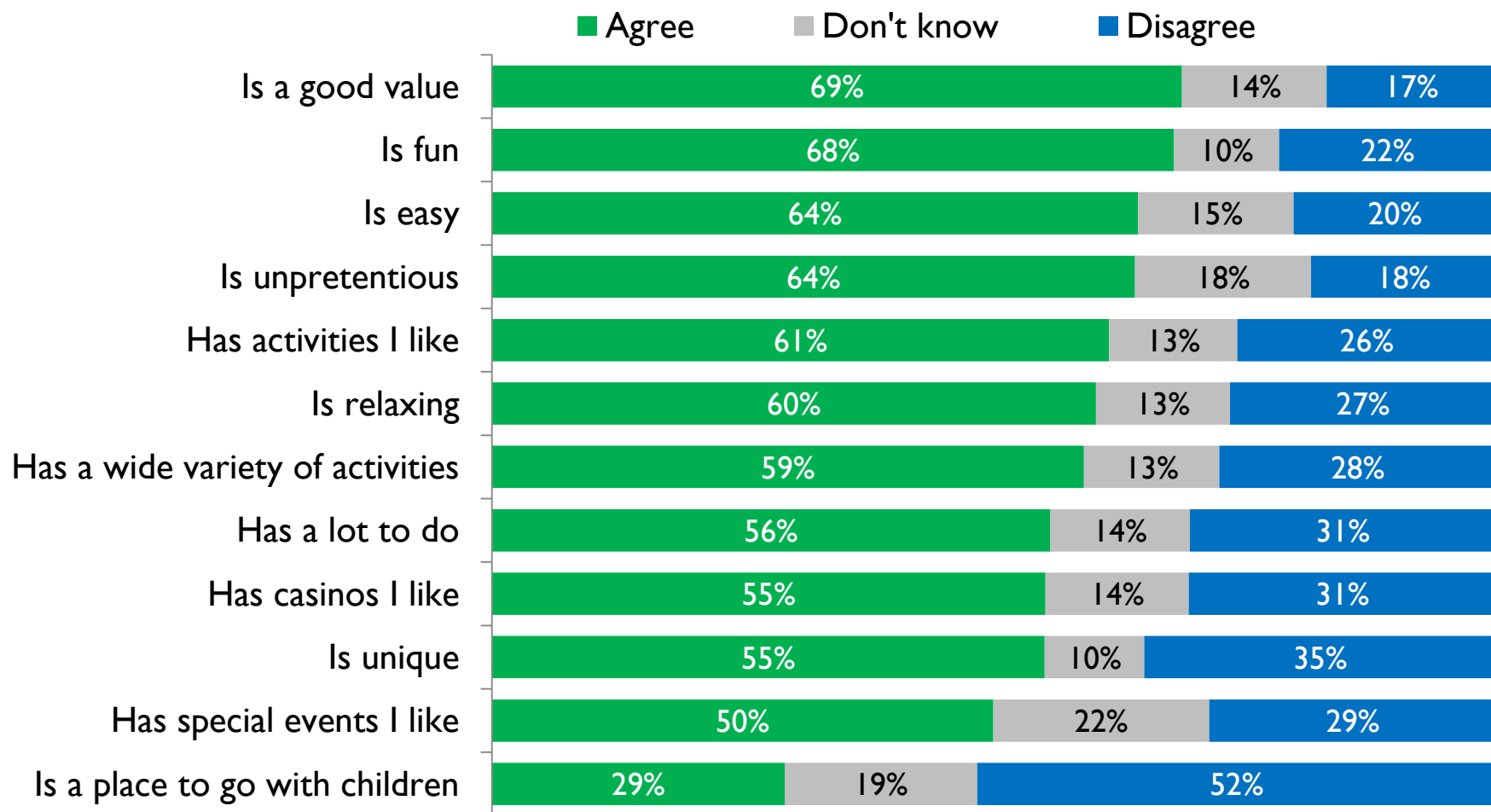
More non-gamers agree that Reno is a place they want to visit

% Agree: Reno is a place I want to visit (Q10)



Over two thirds agree that Reno is a good value and is fun

Do you agree or disagree: Reno... (Q11-Q22)

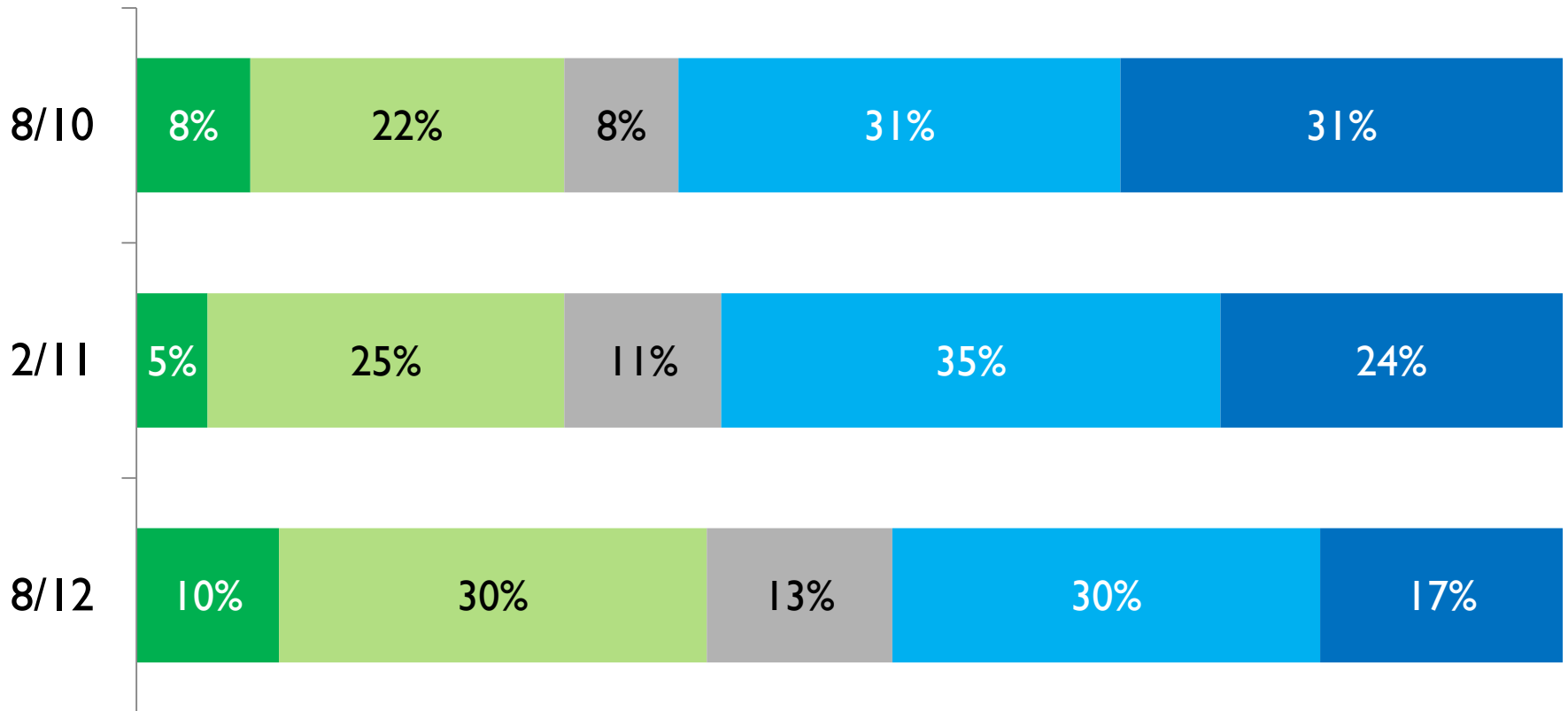


Attitudes among parents have changed about bringing kids

Do you agree or disagree: Reno is a place to go with children? (Q16)

PARENTS (n=259)

Strongly Agree Somewhat Agree Don't Know Somewhat Disagree Strongly Disagree

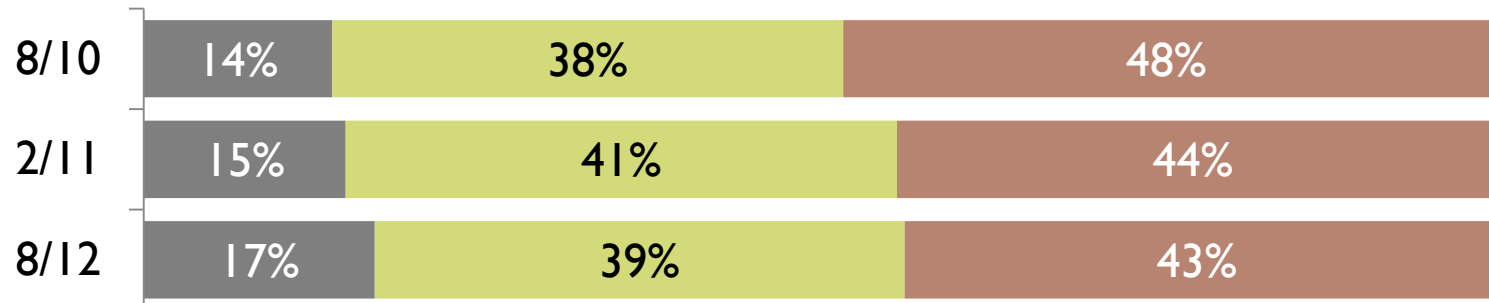


One third report having visited Reno in the last 2 years, no change from previous studies

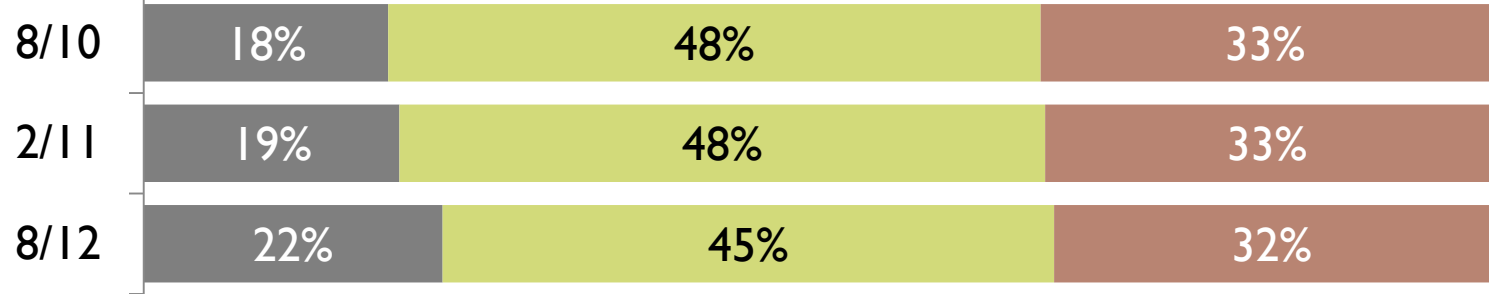
Have you visited Lake Tahoe as an adult? (Q23)
Have you visited Reno as an adult? (Q24)

■ Never visited as an adult ■ Visited as adult 2+ yrs ago ■ Visited in last 2 years

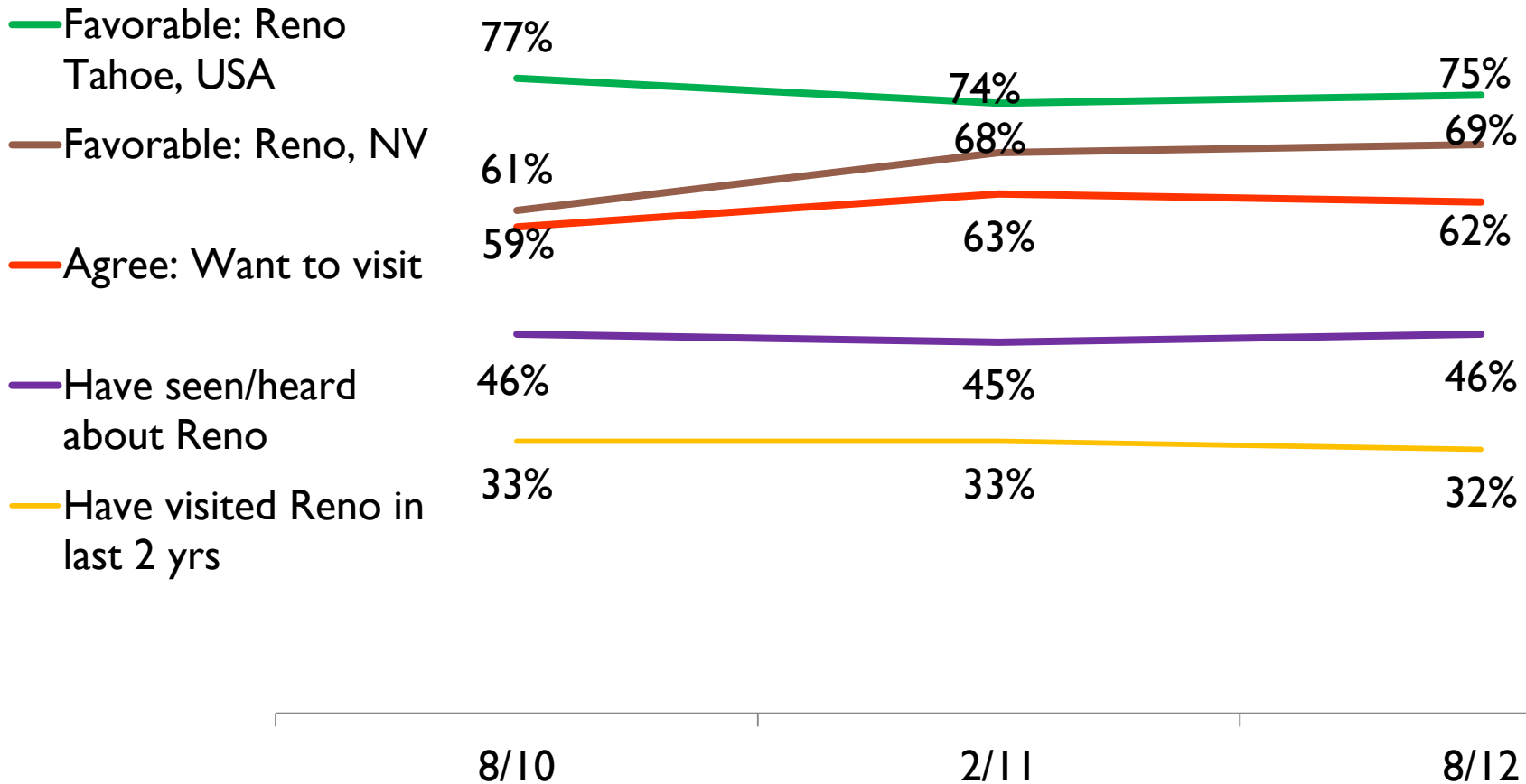
Lake Tahoe



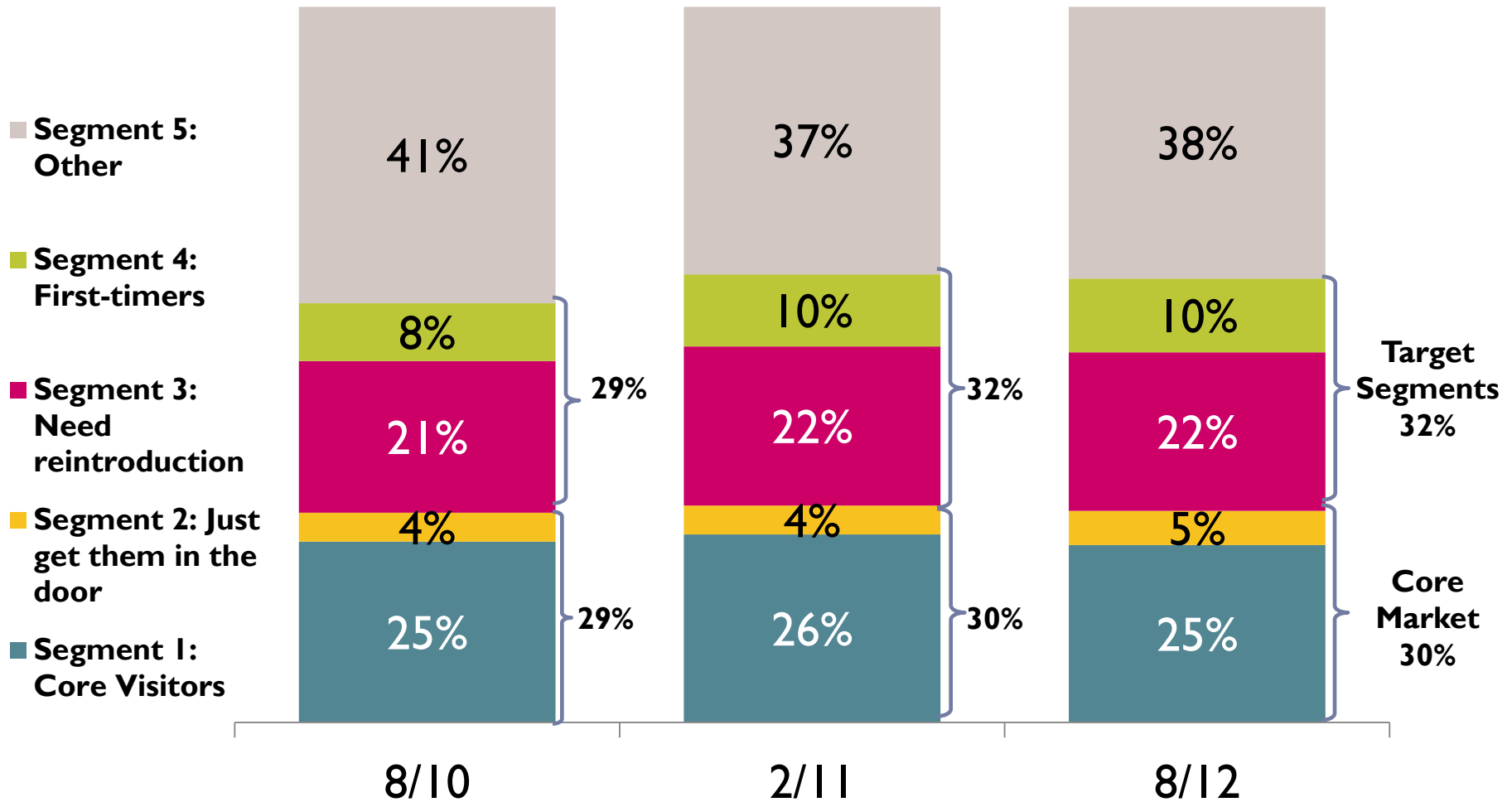
Reno



Key Reno indicators have not changed significantly since February 2011

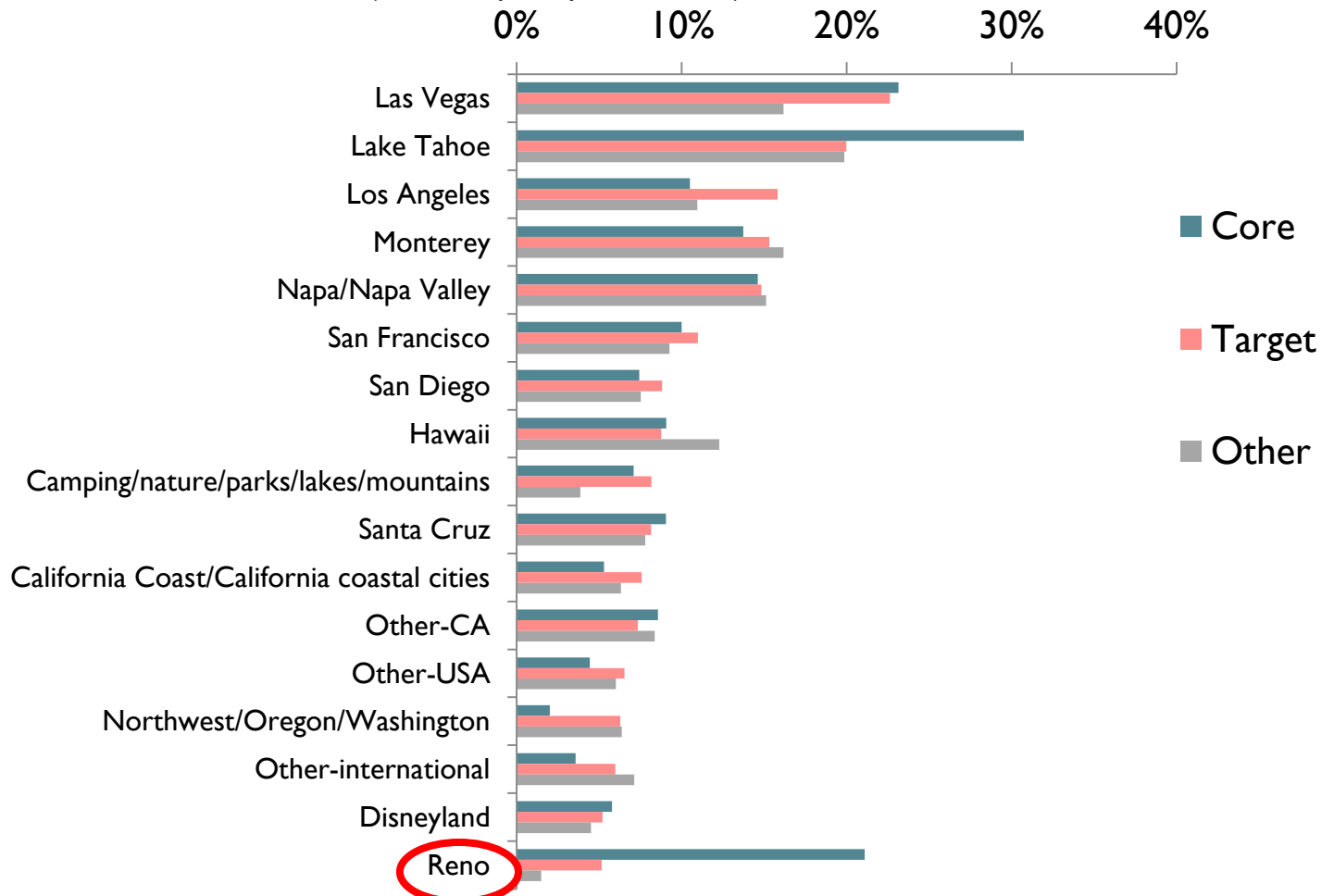


Core Market Survey Tracking: Reno Targeting Segmentation



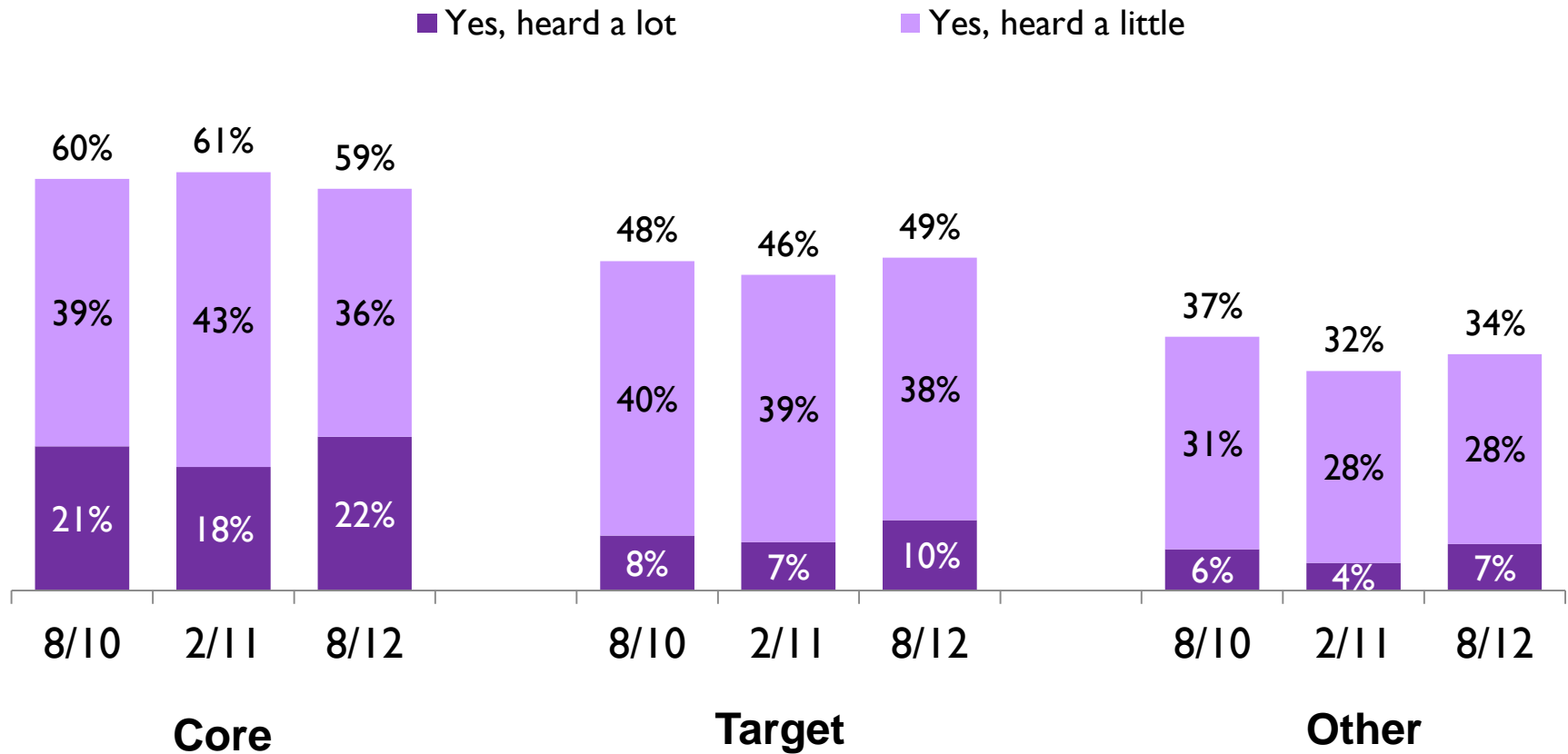
Las Vegas is currently the top getaway mention among the target segments; only 5% currently mention Reno

When you think about getaways or short trips, what places come to mind? (Q4)
 (Most frequently mentioned.)



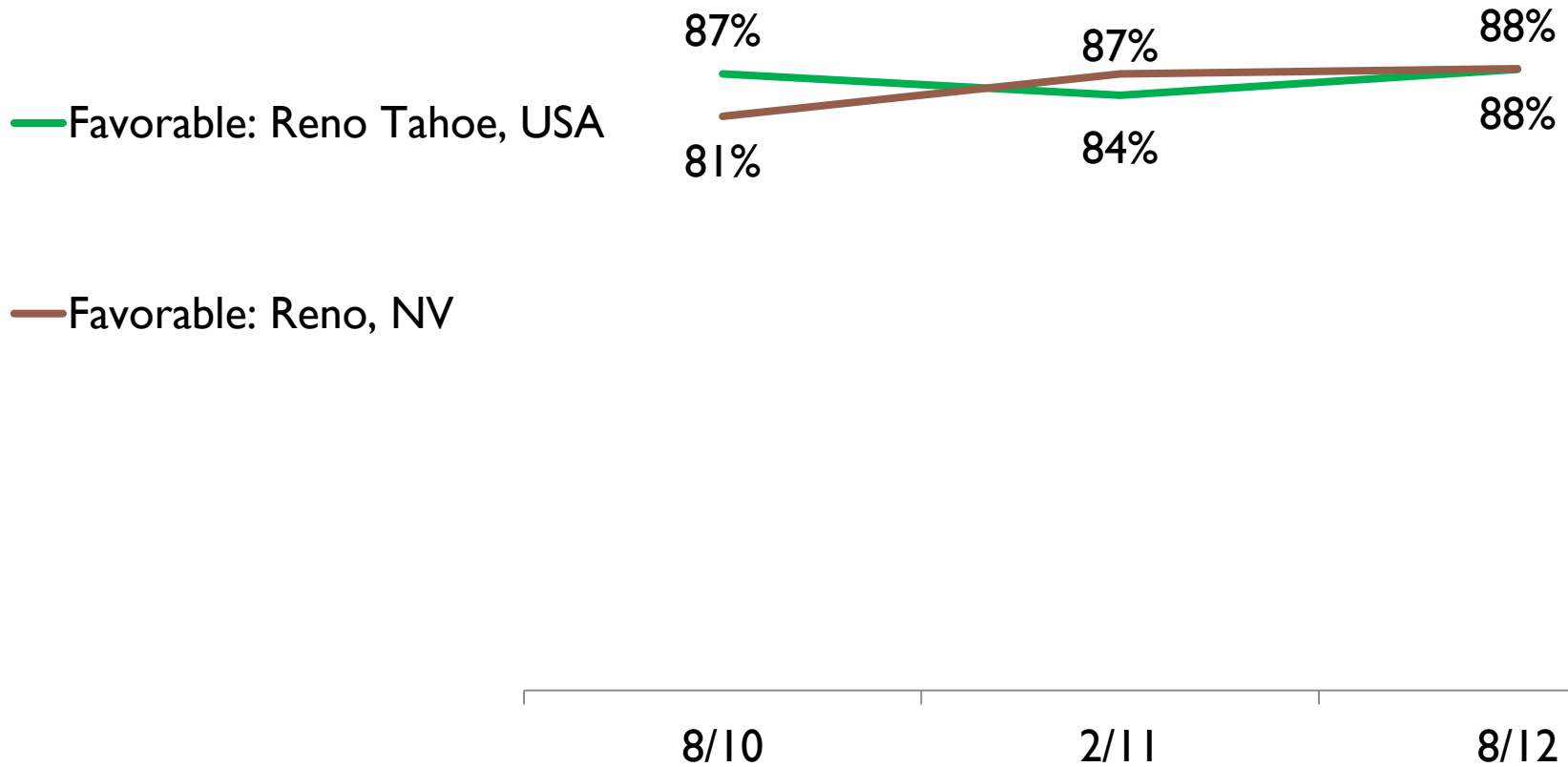
More among the target segments report hearing a lot about Reno recently

Have you heard or read anything lately about Reno? (Q7)



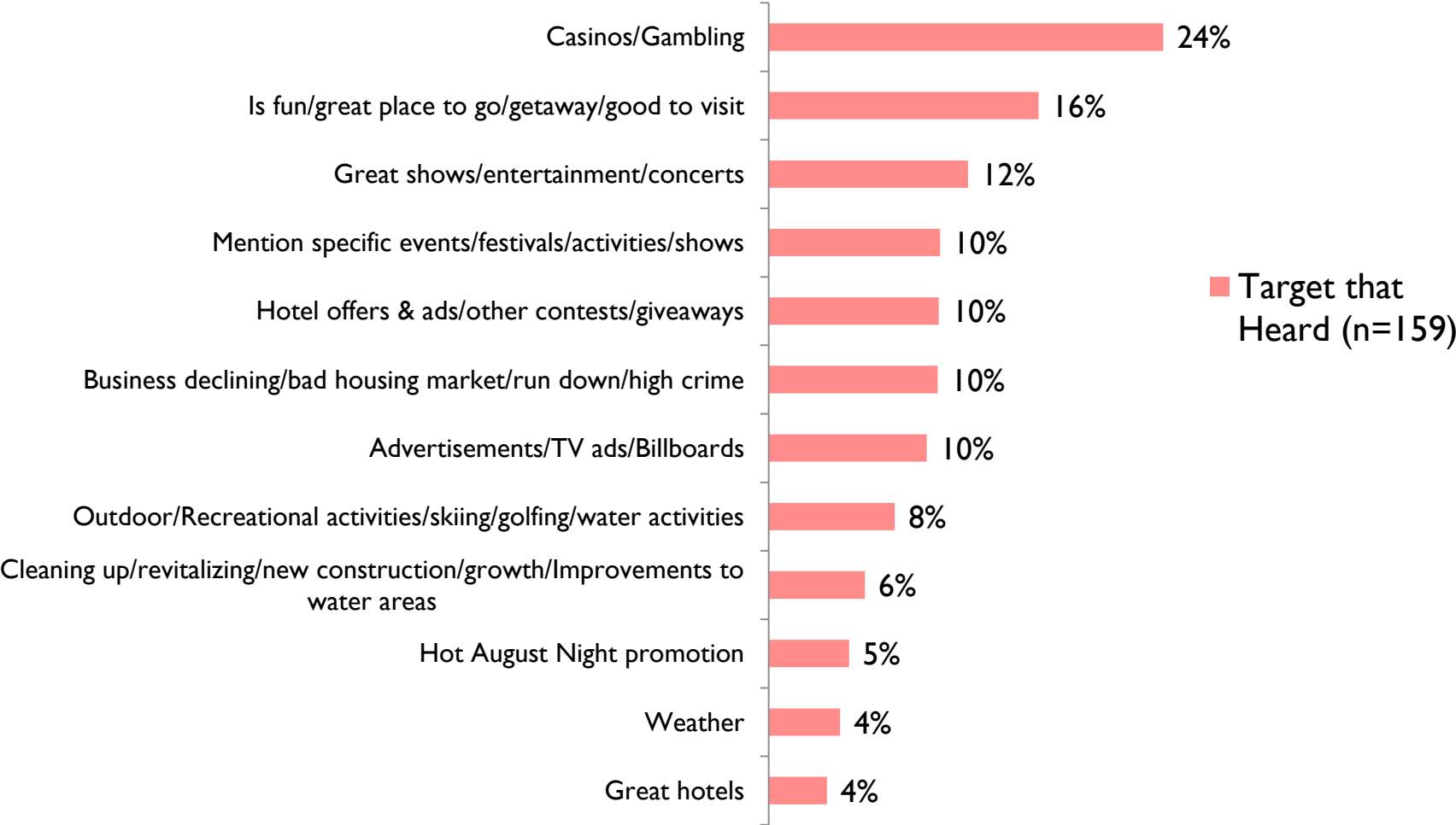
Favorable ratings of Reno have increased among the target segments since 2010, and ratings for Reno and Reno Tahoe, USA are now identical in the target

Among Target Segments (n=329)



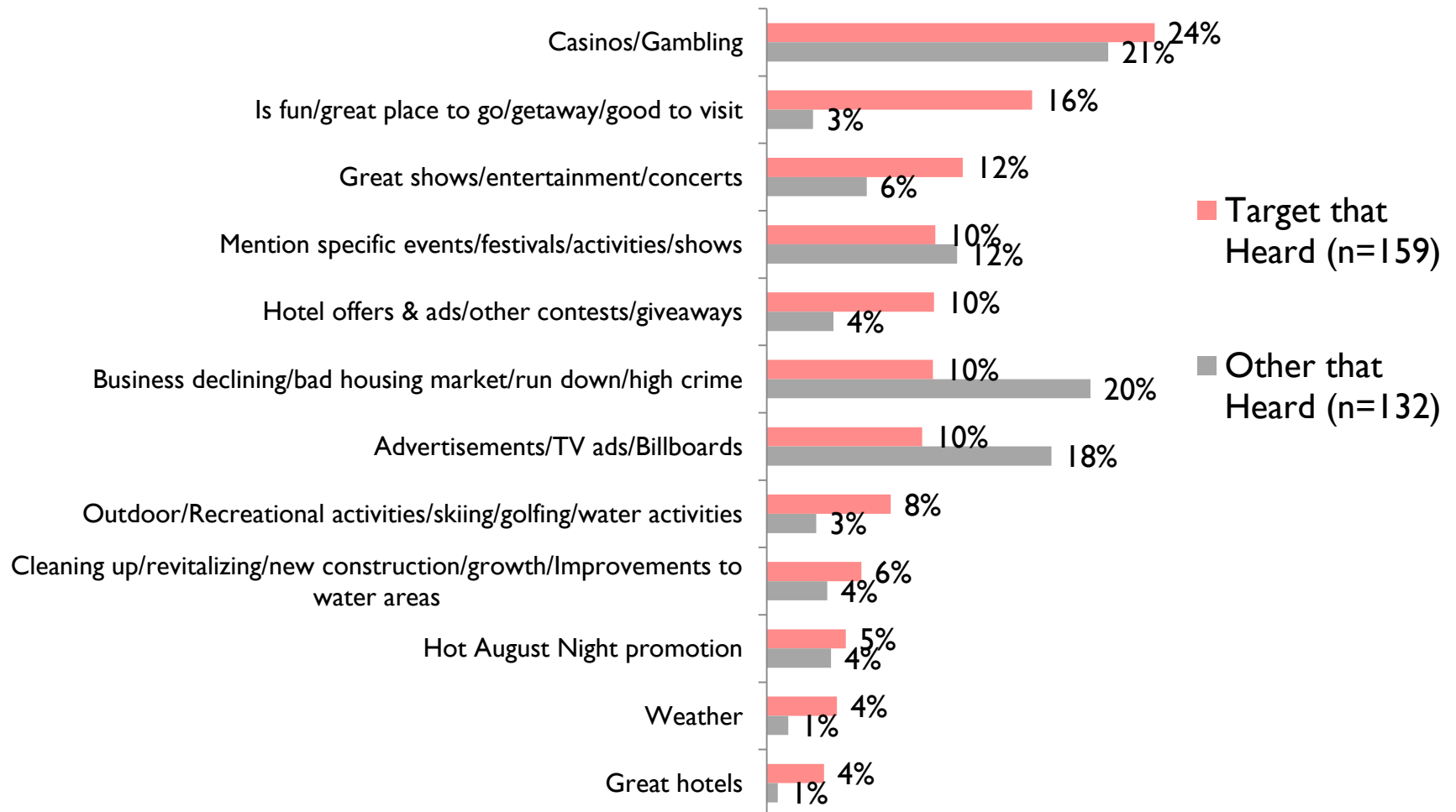
Target group members that have heard something about Reno are most likely to mention casinos/gambling, that Reno is fun, and that Reno has great entertainment

HEARD ABOUT RENO (n=467)



The “Other” segment is more likely to report hearing negative information and generic advertisements

HEARD ABOUT RENO (n=467)



Next Steps

- ▶ Additional analysis as need to help with targeting for marketing.
- ▶ Re-establish tracking every six months – August and February