

MARKET  
& OPINION  
RESEARCH  
SERVICES



Reno-Sparks Convention and  
Visitors Authority

## 2015 Visitor Profile Survey *Summary Presentation*

*Conducted for RSCVA  
January 2015 – February 2016*

# Contents

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- 1) **Methodology, Key Findings**
- 2) Key Demographics
- 3) Visitor Satisfaction and Intent to Return
- 4) Activities and Spend
- 5) Trip and Accommodation Planning
- 6) Focus on Gamers
- 7) Focus on Families
- 8) Focus on Millennials
- 9) Focus on Infrequent Visitors

# Methodology

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- ▶ Internet panel survey of Washoe County visitors age 21 and older
- ▶ Conducted early in each month to capture visitors from the prior month
- ▶ Respondents reached using a nationally representative web panel screened for Washoe County visitors
- ▶ 3,600 respondents screened to participate each month (2,000 in Western oversample and 1,600 national)
- ▶ Screener data weighted using geography, age, and gender to achieve a representative national sample
- ▶ When applicable, 2015 results are compared to the 2011 and 2013 RSCVA Visitor Profile Surveys

# 2015 Key Findings

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- ▶ The demographics of Reno visitors are shifting, with more ethnic and geographic diversity, growing shares of 35 to 64 year olds, and more family travelers. Bay Area residents are a shrinking share of Reno visitors.
- ▶ Self-reported visitation continues to be highest in the third quarter of the year.
- ▶ While visitor satisfaction and intent to return remain strong and consistent with previous years, seniors and retirees report slightly lower satisfaction ratings than other groups.
- ▶ Reno visitors partake in a variety of local activities, including sightseeing, shopping, gaming, and events.
- ▶ Self-reported spend is up, with a decreasing share attributed to gaming.

# Contents

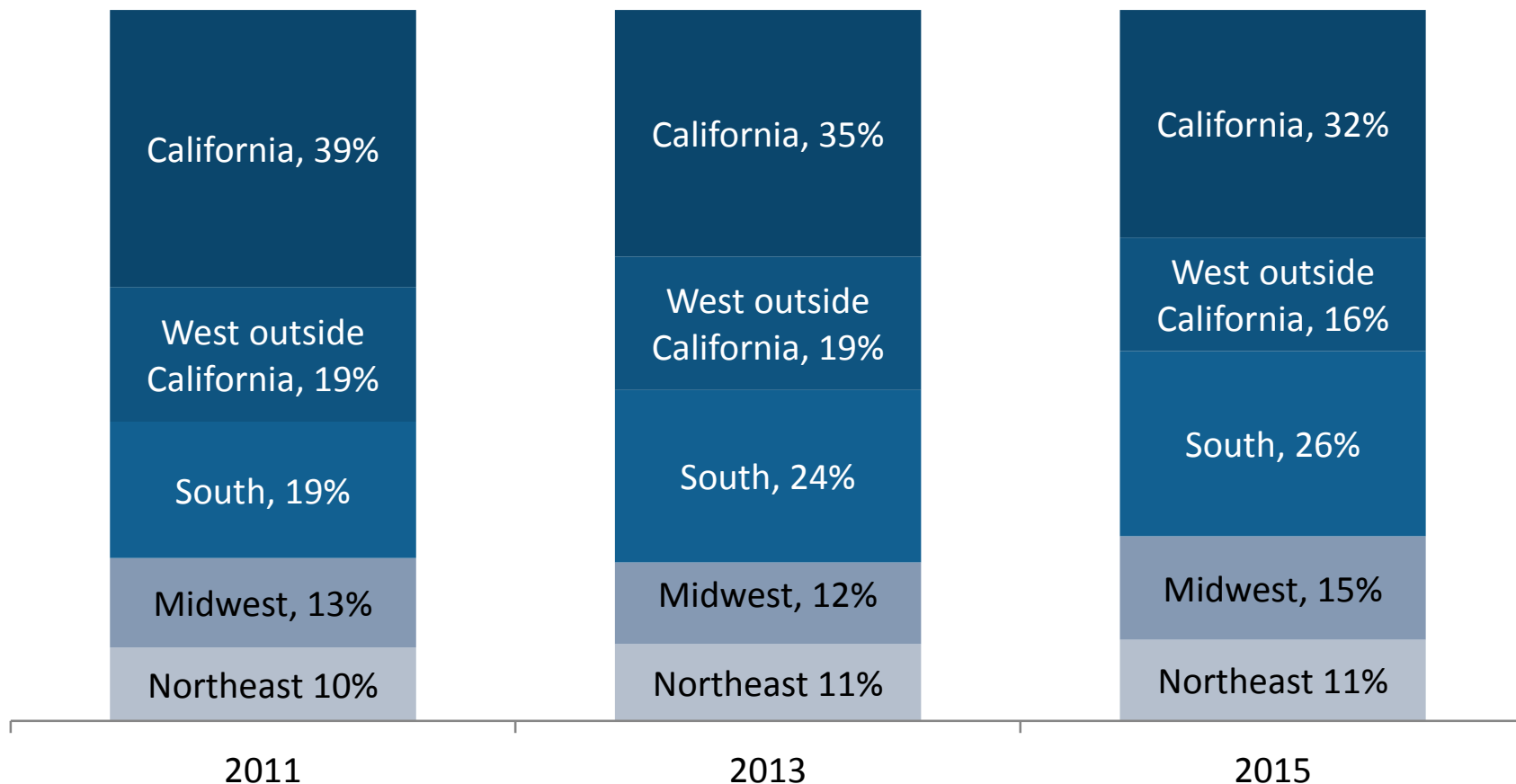
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- 2) Key Demographics**
- 3) Visitor Satisfaction and Intent to Return
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# Visitor Share by Origin State Over Time

*Californians made up just over three in ten Reno visitors in 2015, a declining share as compared with 2013 and 2011.*



# Share of Visitors by State

*Visitors in the South mostly come from Texas and Florida.*

	Northeast (11%)		Midwest (15%)		South (26%)		West (47%)
NY	5%	IL	4%	TX	7%	CA	32%
PA	3%	OH	3%	FL	5%	NV	3%
MA	2%	MI	2%	GA	3%	AZ	3%
NJ	1%	IN	2%	MD	2%	WA	2%
CT	1%	MN	1%	NC	1%	OR	1%
RI	0%	IA	1%	AL	1%	CO	1%
ME	0%	MO	1%	SC	1%	UT	1%
NH	0%	KS	0%	VA	1%	NM	1%
VT	0%	WI	0%	AR	1%	ID	1%
		NE	0%	KY	1%	HI	1%
		SD	0%	TN	1%	AK	0%
		ND	0%	OK	1%	MT	0%
				DE	0%	WY	0%
				DC	0%		
				LA	0%		
				MS	0%		
				WV	0%		

# California Visitors Over Time

*The share of visitors from the Bay Area is trending downward.*

	% Share of Visitors to Reno		
	2011	2013	2015
Los Angeles	10%	11%	10%
<b>SF Bay Area</b>	<b>14%</b>	<b>11%</b>	<b>9%</b>
Sacramento	7%	6%	6%
San Diego	2%	2%	3%
Central Valley	3%	3%	2%
Central Coast	1%	1%	1%
North	1%	1%	1%

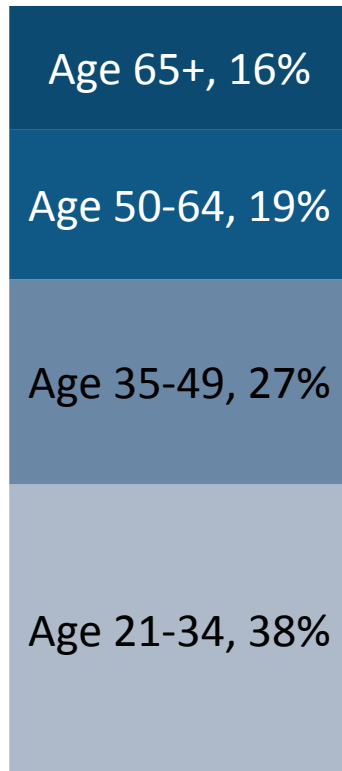
*Percentages in this table represent the total share of visitors to Reno, NV.  
(Total number of visitors from region) ÷ (Total number of visitors to Reno)*



# Visitor Share by Age Over Time

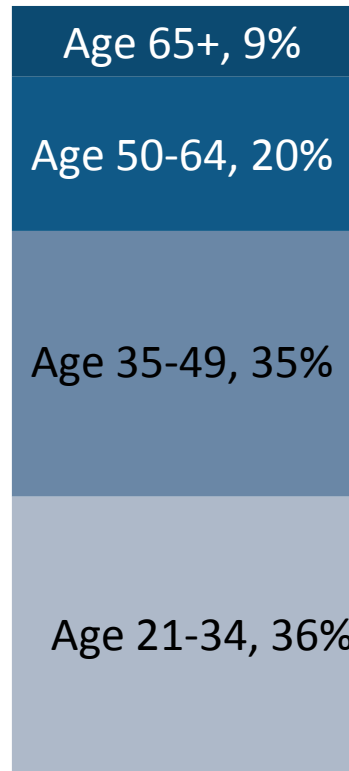
*Seniors and millennials make up a declining share of Reno visitors, while the overall mean visitor age remains in the low 40s.*

**Mean age 2011:**  
**44**



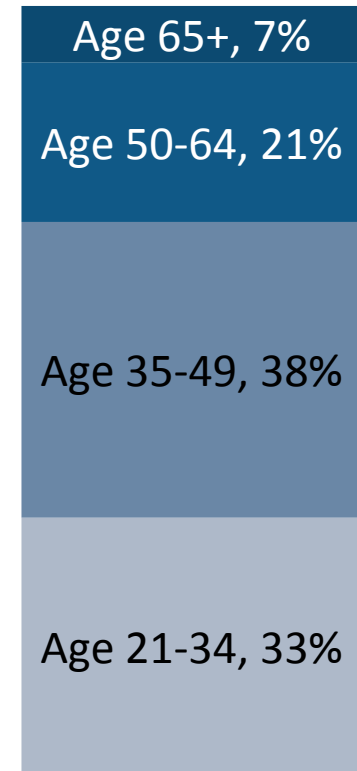
2011

**Mean age 2013:**  
**43**



2013

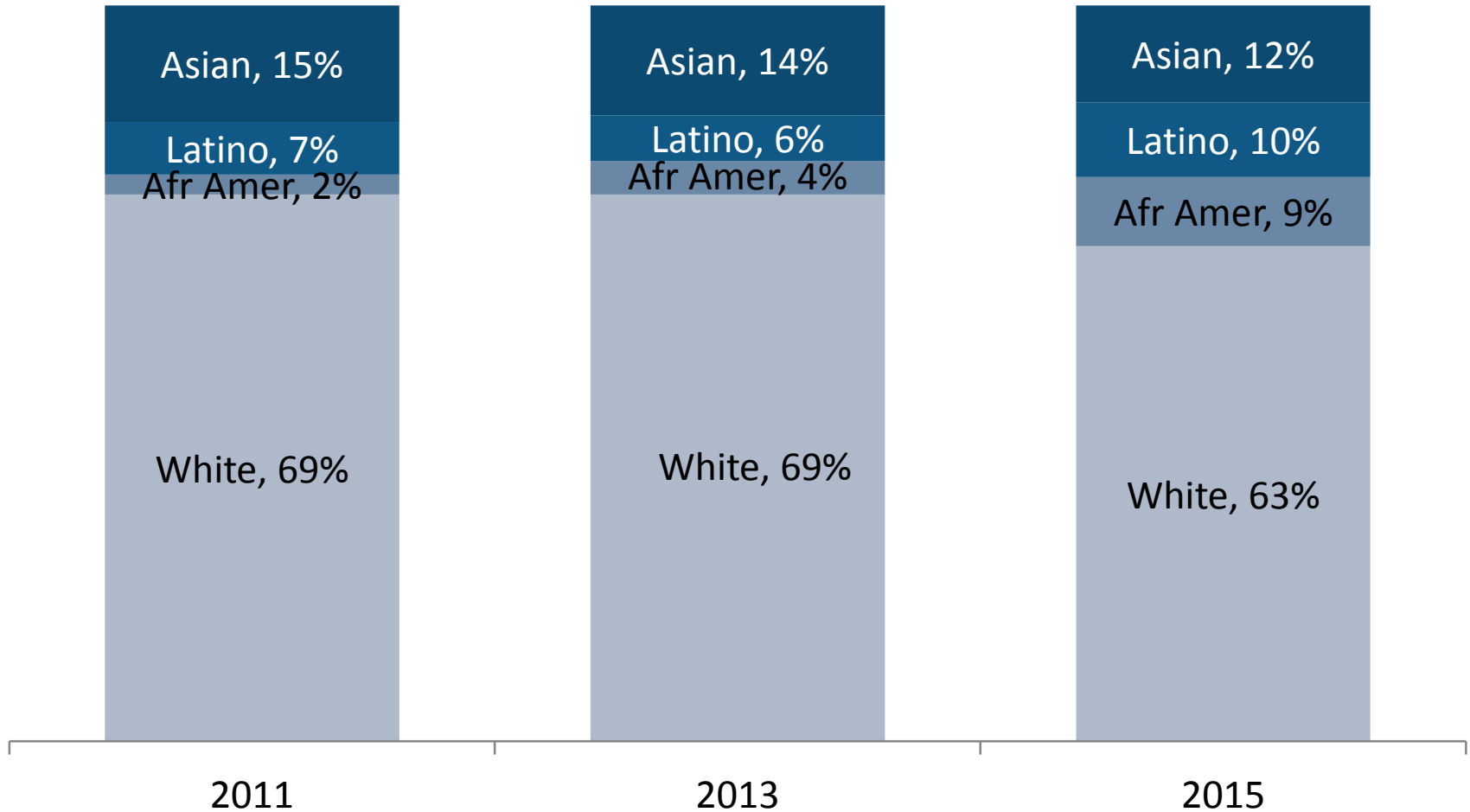
**Mean age 2015:**  
**42**



2015

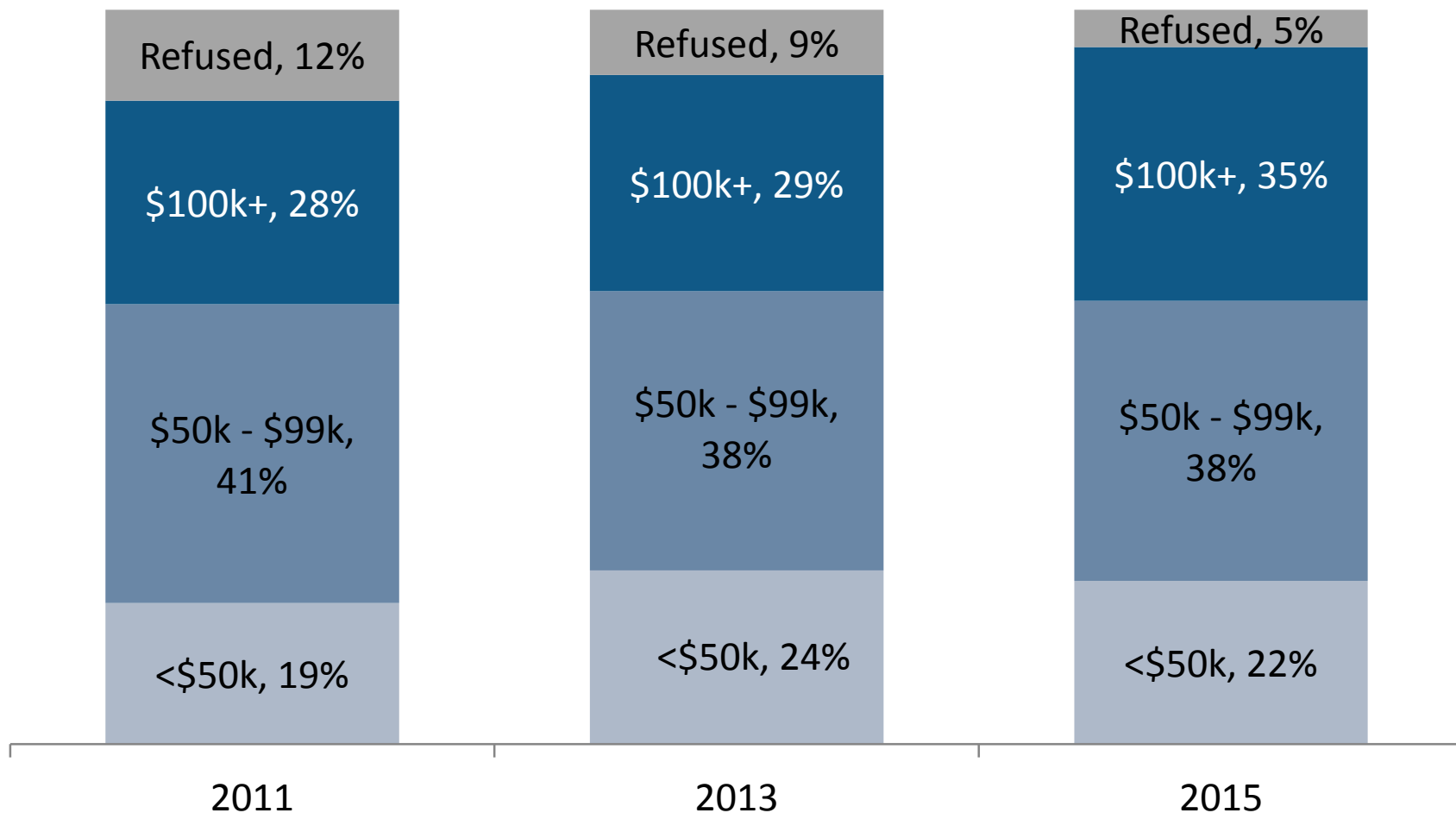
# Visitor Share by Ethnicity Over Time

*Reno is seeing a greater diversity of visitors than in prior years.*



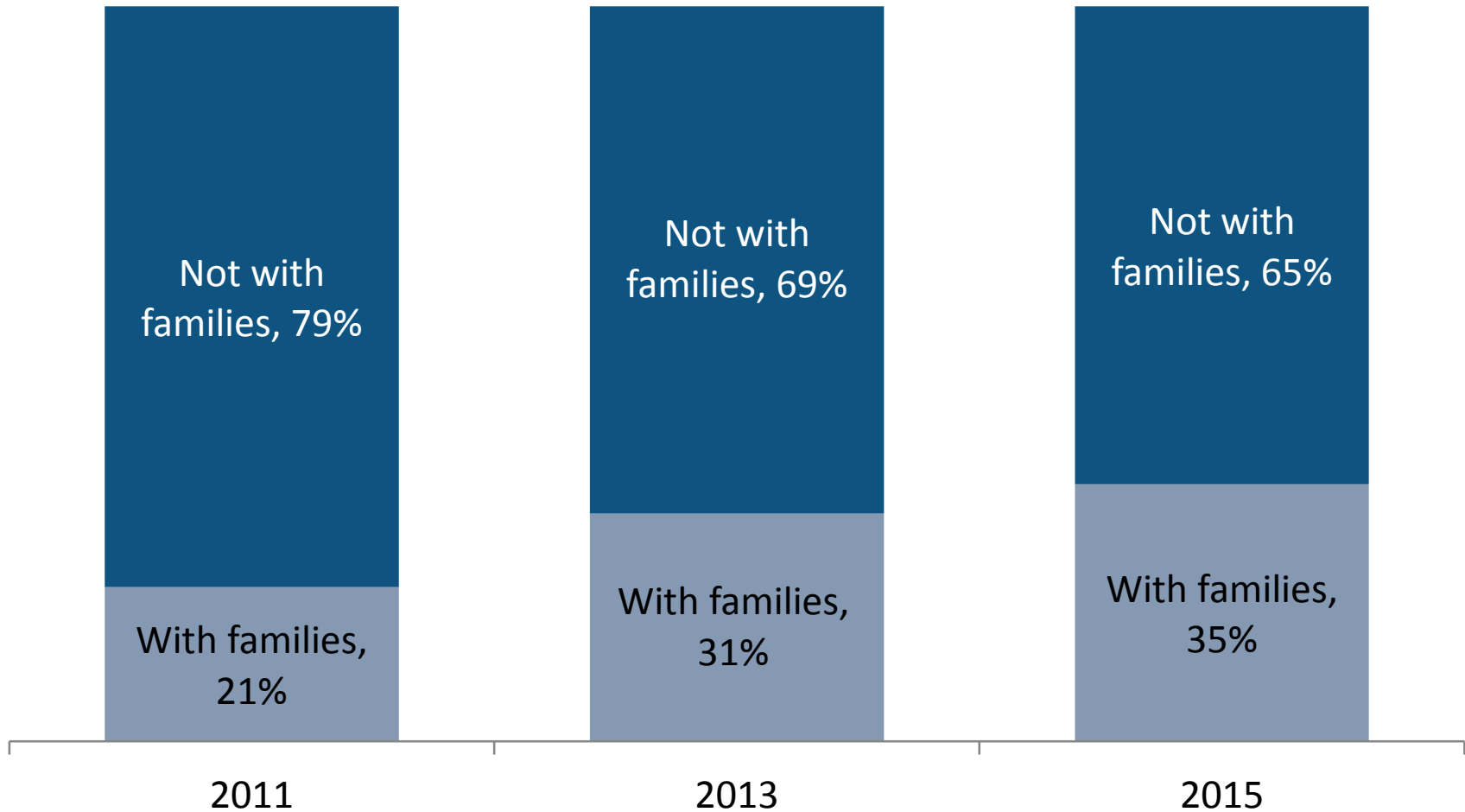
# Visitor Share by Income Over Time

*Visitors whose household income is over \$100k is growing.*



# Visitor Share by Family Presence Over Time

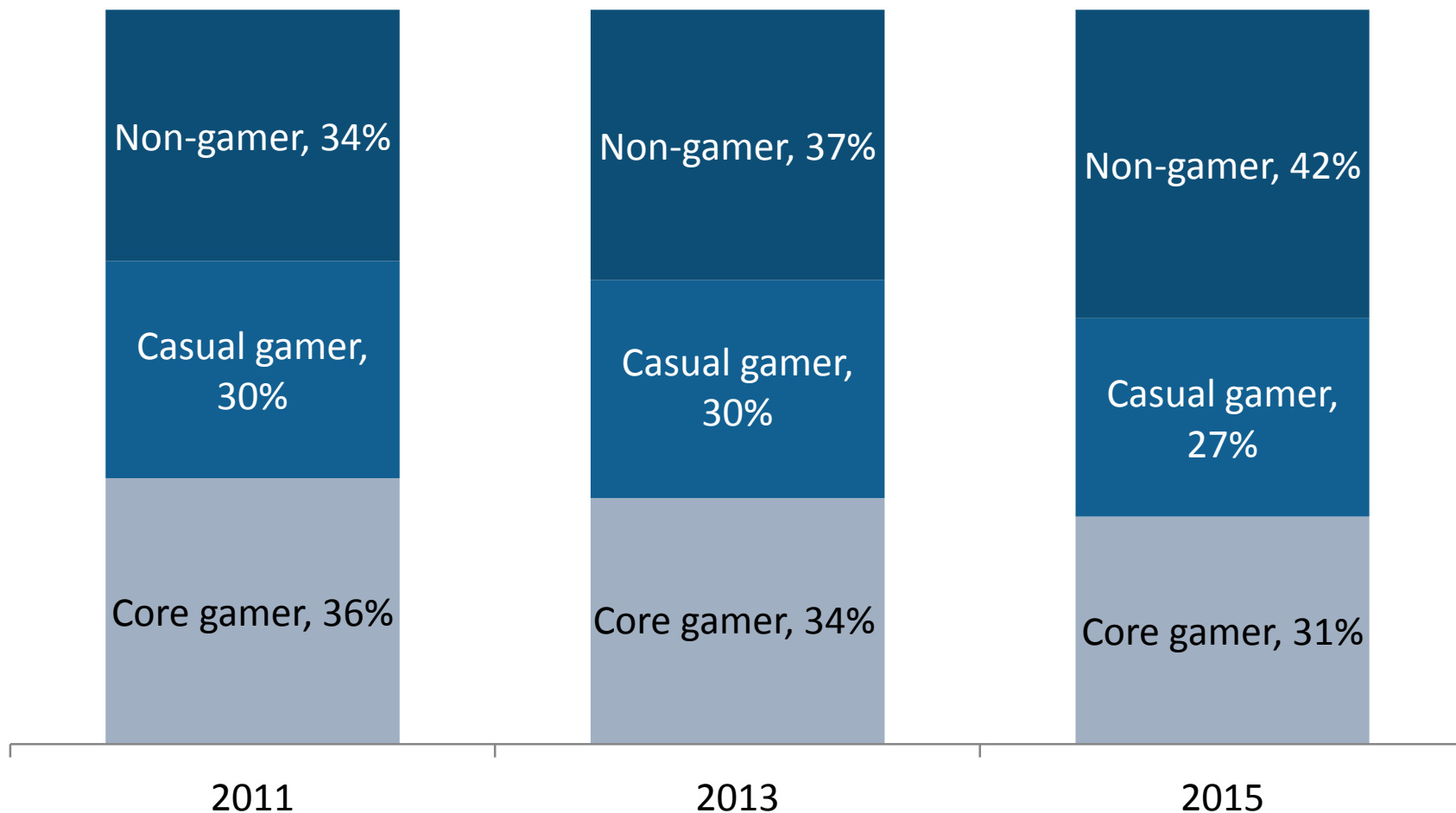
*A greater percentage of Reno visitors come in family groups than in prior years.*



*"With Families" either have children and report having someone under 21 in their travel party OR are over 30 and report having someone under 21 in their travel party.*

# Visitor Share by Gaming Over Time

*The share of visitors who report not gaming continues to grow.*

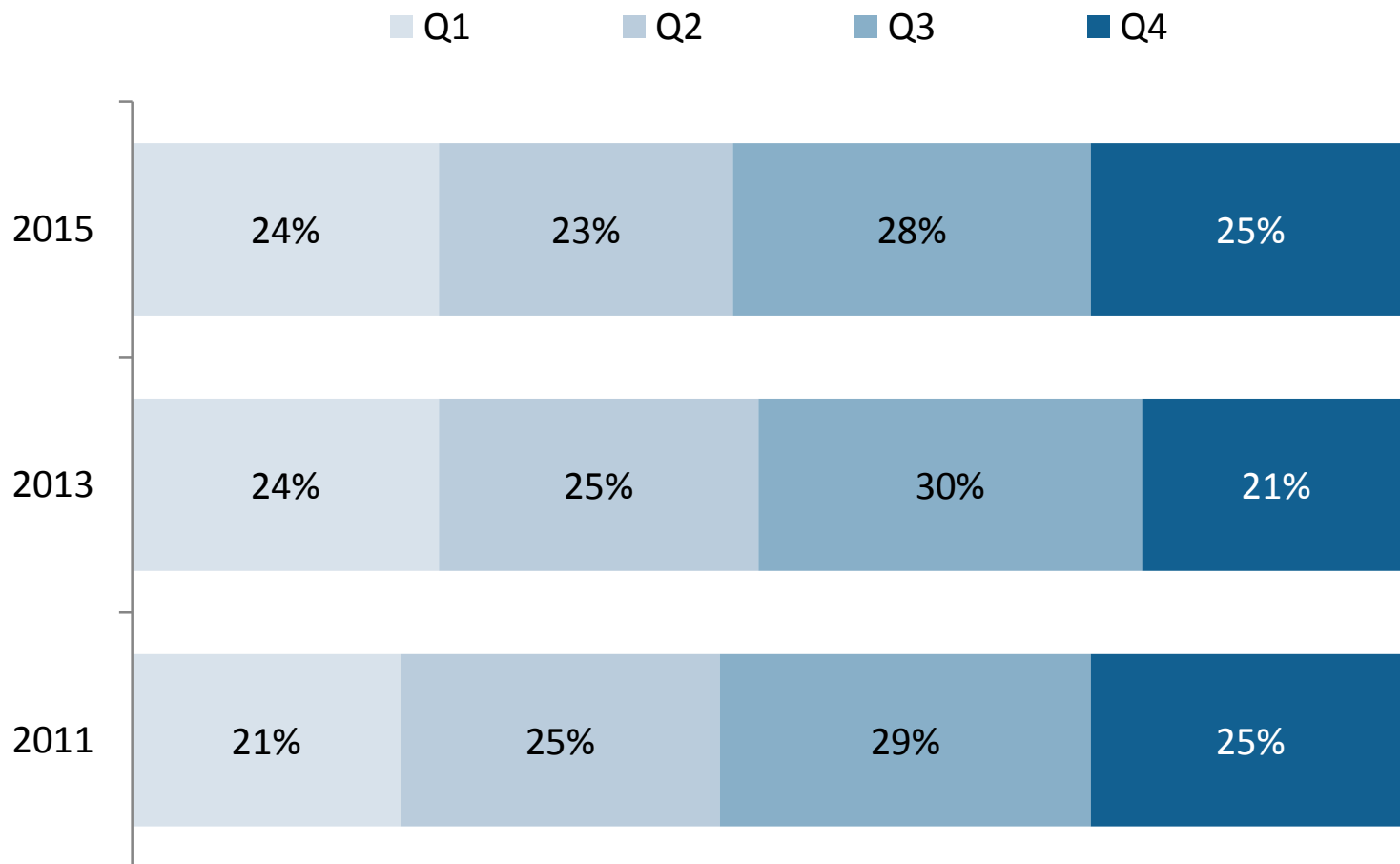


*"Core Gamer" spent \$100+ on gaming OR [stayed in a gaming property AND spent more than \$50 on gaming]*

*"Casual Gamer" spent \$1-\$99 on gaming OR [stayed at gaming property AND spent less than \$50 on gaming]*

# Share of Visitors by Quarter

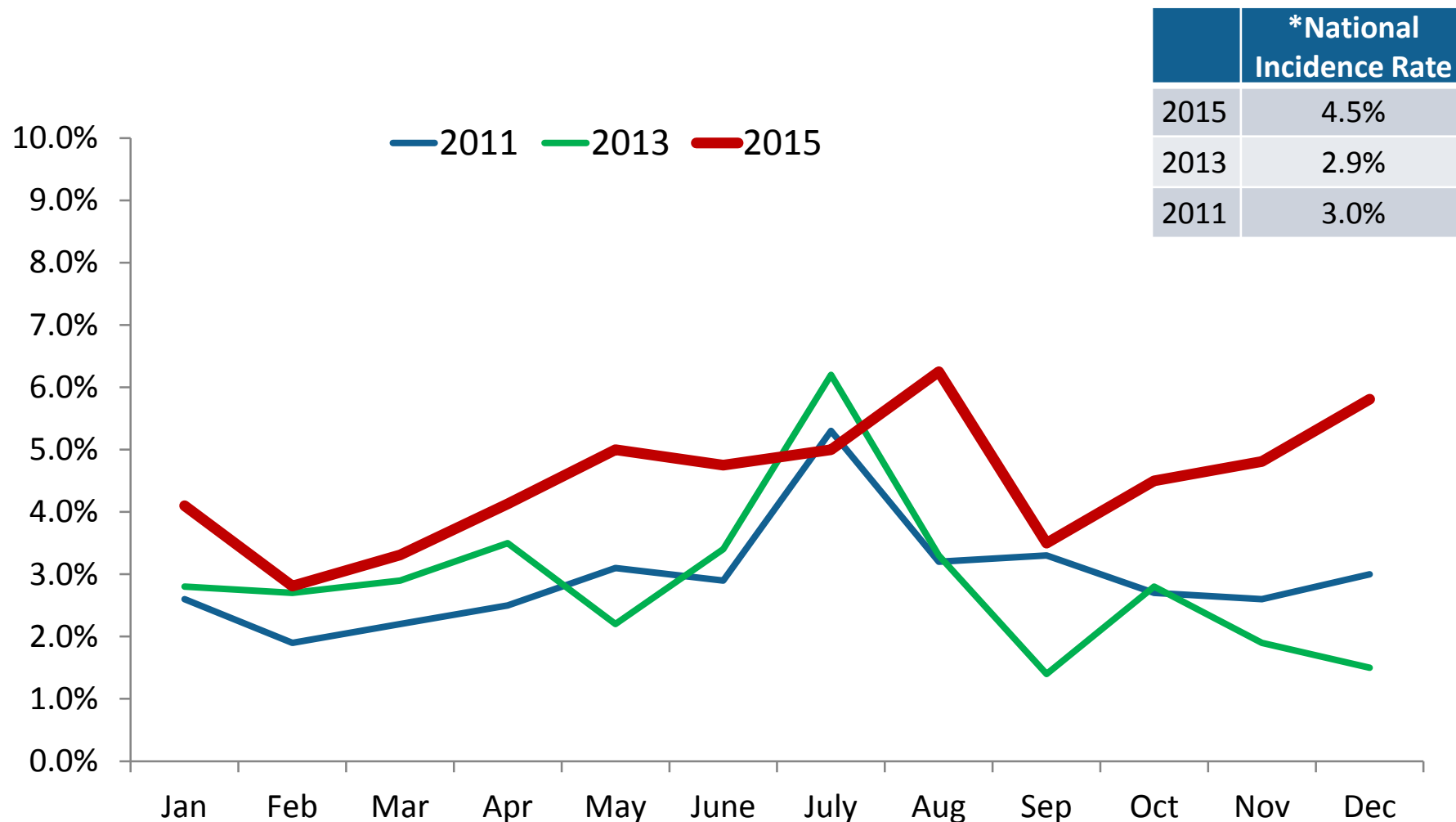
*More than half of Reno's visitors come in the second half of the year, with nearly three in ten visiting in the third quarter.*





# Visitation Trends – National Panel Sample

*Self-reported visitation has peaked in the summer each year studied.*

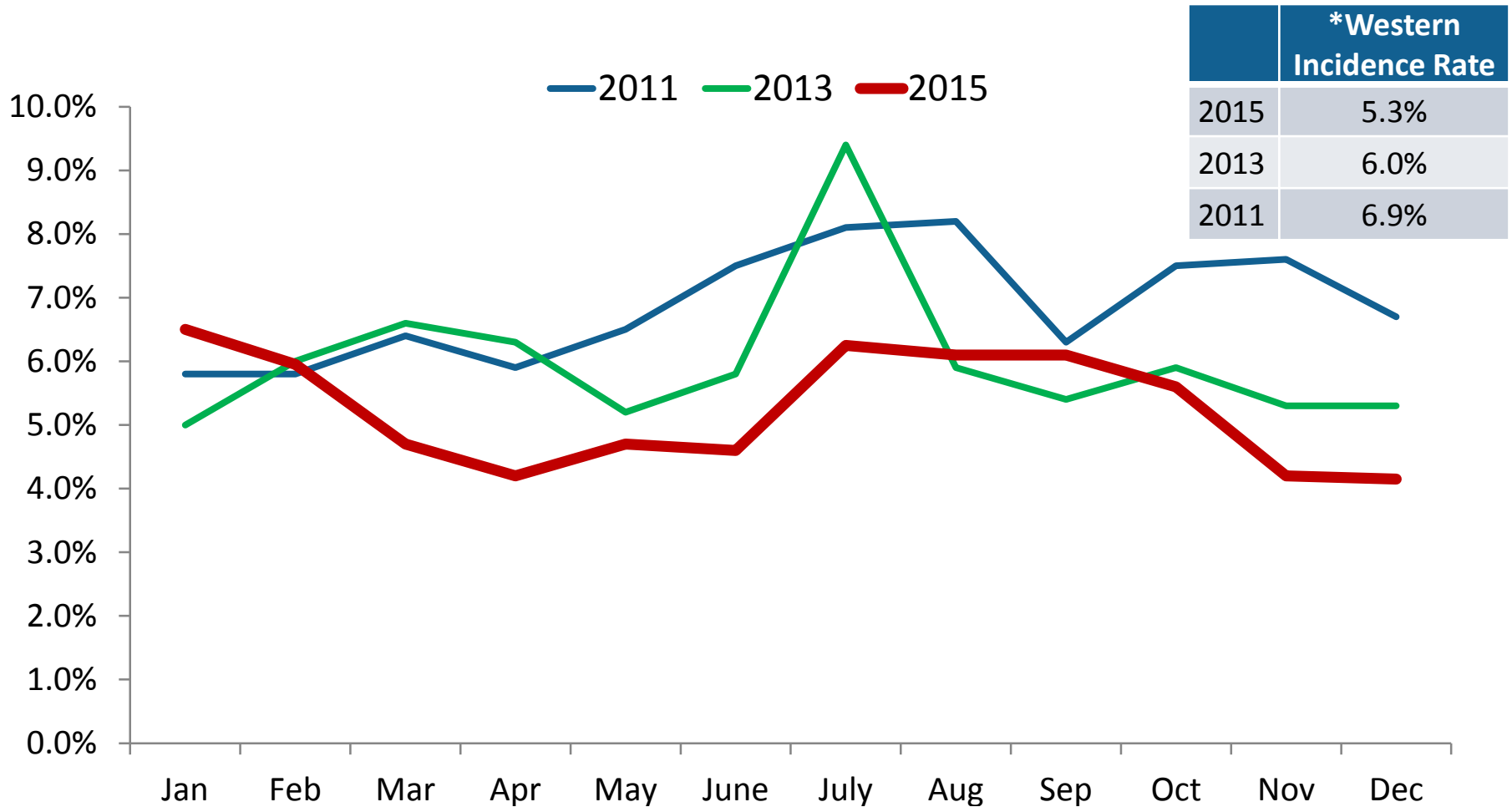


Each month, 1,600 nationally representative panel members are asked whether they visited Washoe County.

**\*Incidence = (# of respondents who report visiting Reno in the last year) ÷ (Total number sampled)**

# Visitation Trends – Western Panel Oversample

*Visitation from Western states rose in the summer as it has in prior years, but the rise was spread over the entire third quarter instead of concentrated as in 2013.*



Each month, an oversample of 2,000 Western state panel members is asked whether they visited Washoe County.

**\*Incidence = (# of respondents who report visiting Reno in the last year) ÷ (Total number sampled)**

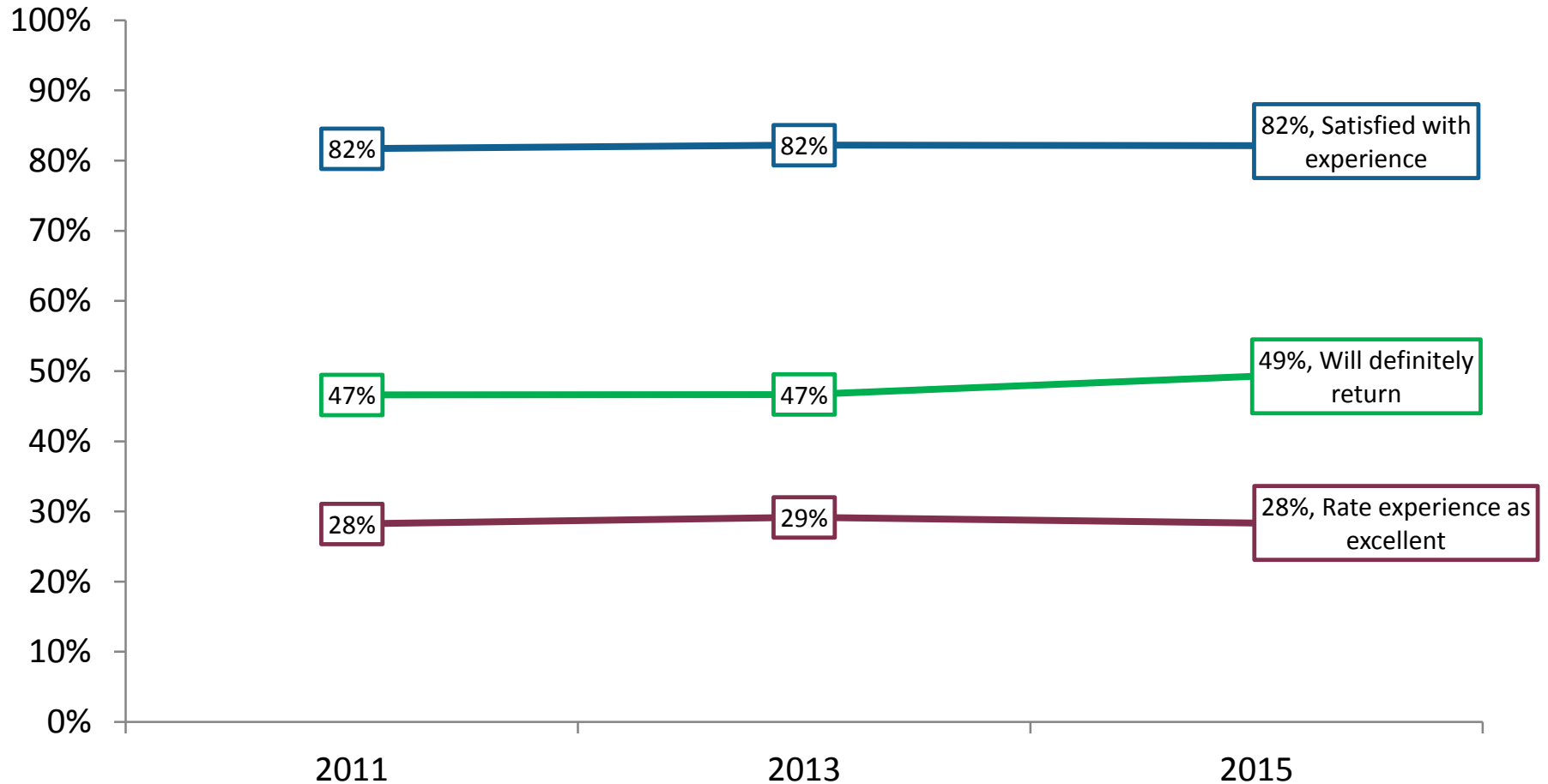
# Contents

---

- 1) Methodology, Key Findings
- 2) Key Demographics
- 3) Visitor Satisfaction and Intent to Return**
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# Returning to Reno and Experience Rating Over Time

*Four in five Reno visitors were satisfied with their visit, and half say they will definitely return in the next two years.*



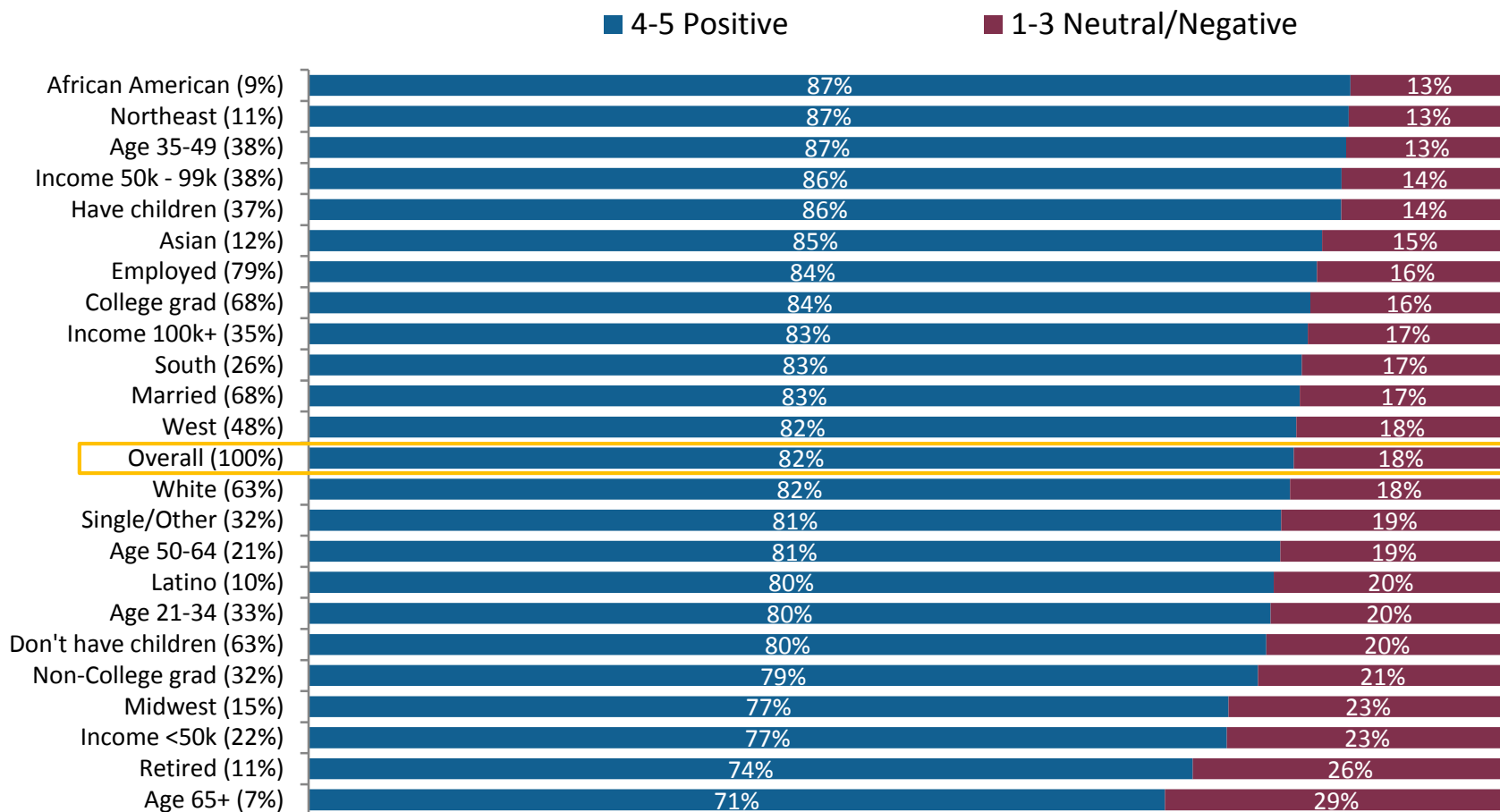
Q27. On the following scale, how would you rate your overall experience on your most recent trip to the Reno area?

Q30. What is the likelihood that you will return to the Reno area in the next two years?

# Experience Rating by Demographics

*While all subgroups report a generally positive experience with Reno, seniors and retirees gave the lowest ratings of their experience.*

***How would you rate your overall experience on your most recent trip to The Reno Area?***

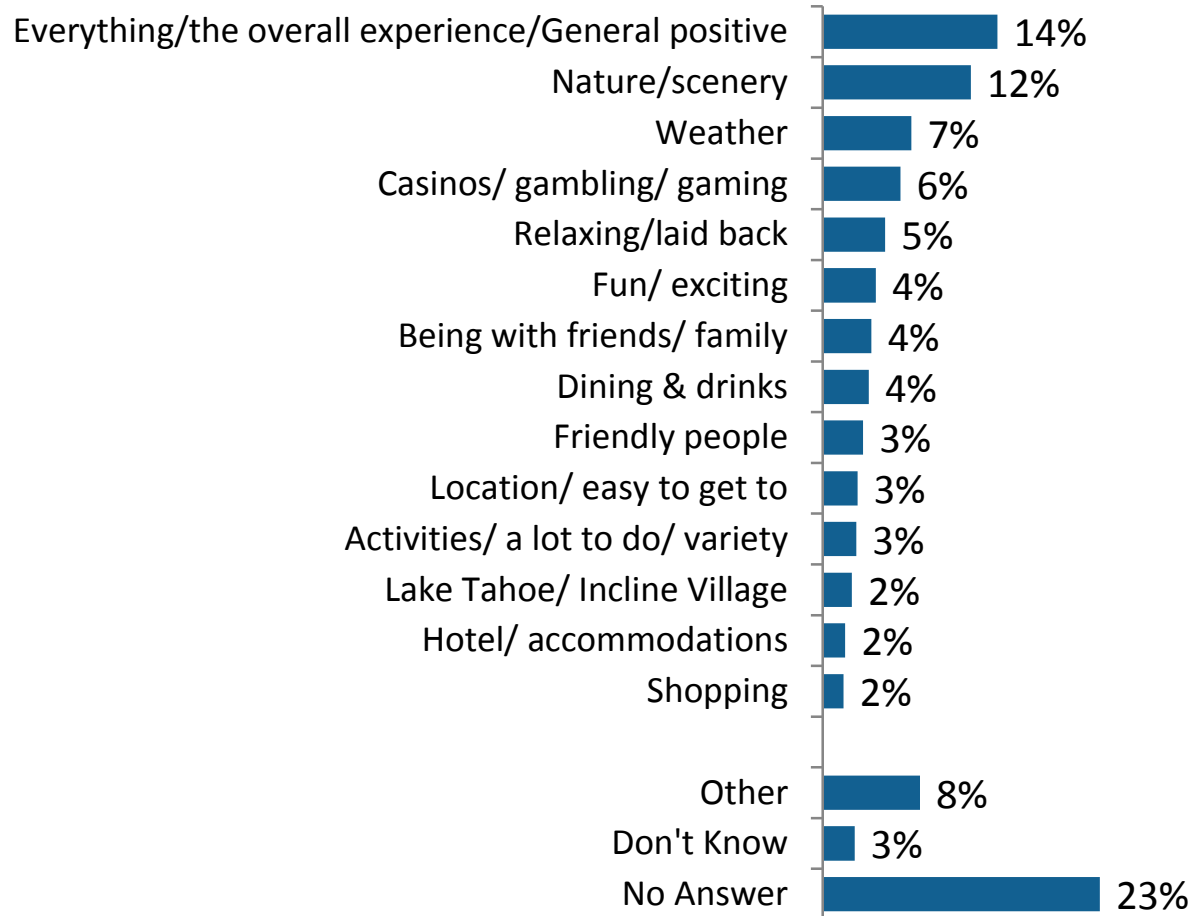


Q27. On the following scale, how would you rate your overall experience on your most recent trip to the Reno area?

# Positive Experiences in Reno

*Outdoor experiences are memorable for visitors, such as nature, scenery and the weather.*

## ***What did you like about your experience (in Reno)? 1,745n***

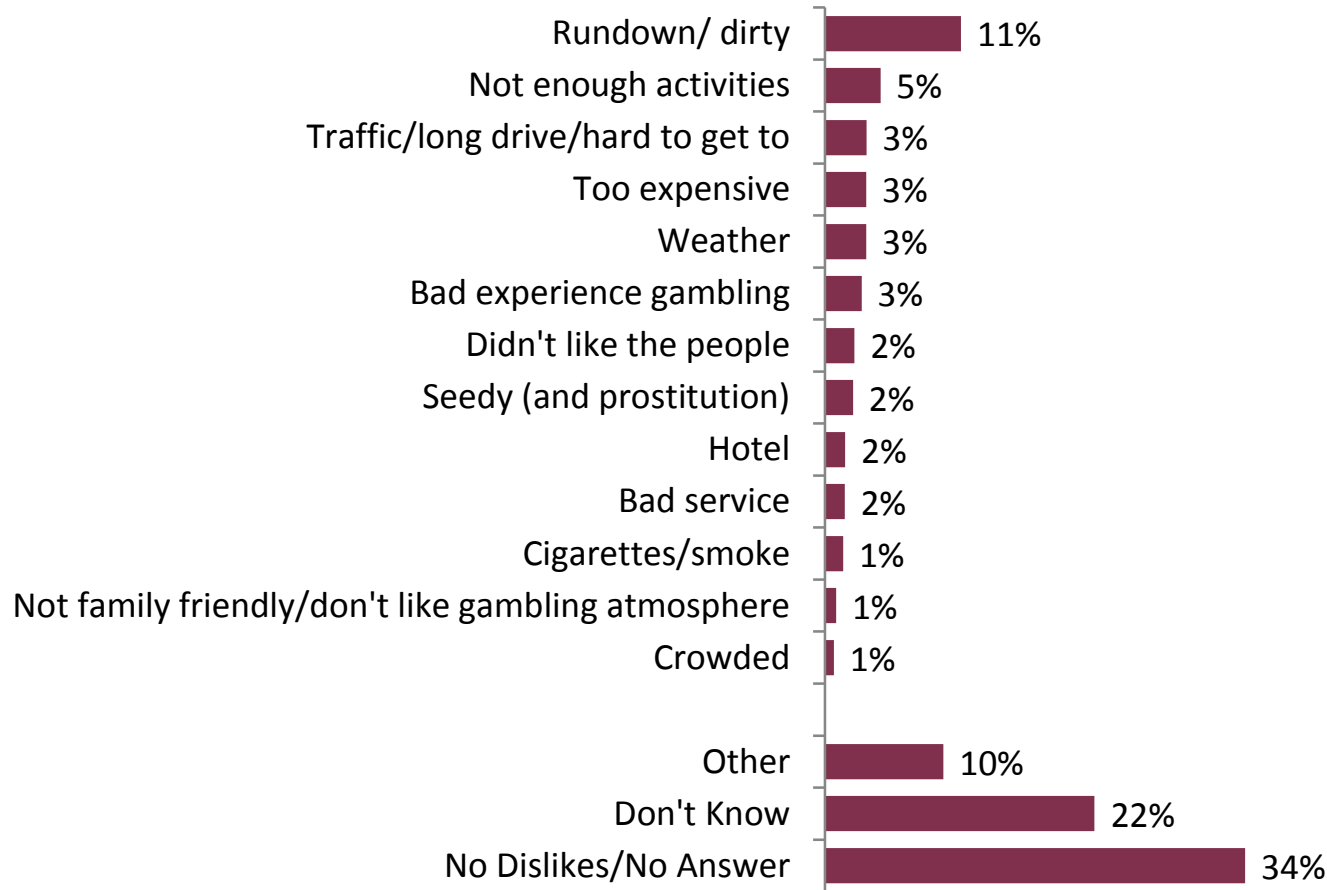




# Negative Experiences in Reno

*While one-third could not specifically say anything they did not like about Reno, one in ten felt it was run down or dirty.*

## ***What did you dislike about your experience (in Reno)? 379n***



# Contents

---

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# Self-Reported Participation: Top Activities

*Activities are diverse and similar to previous years.*

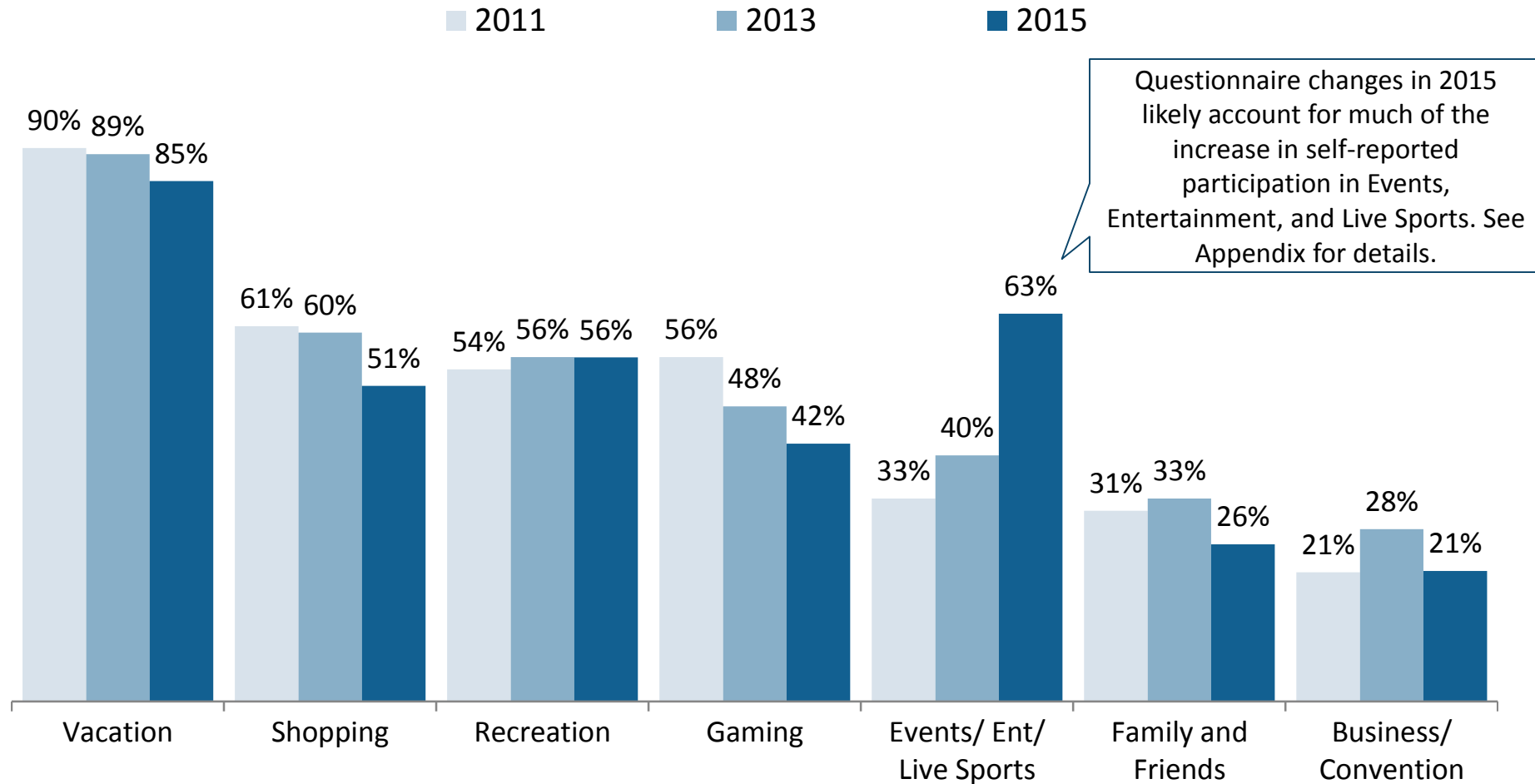
Activity	2011	2013	2015
Rest and relax	62	53	48
Gamble	55	48	42
Shop	49	46	38
Sightseeing in Reno	53	51	37
Sightseeing in Lake Tahoe	41	37	34
Shop at Legends Shopping Center, Scheels Sporting Goods, Cabela's, Meadowood Mall, Summit Mall, or somewhere else	42	42	34
Hike or bicycle	23	25	22
Visit friends or relatives	28	28	21
*Nightclub	-	-	21
Bowl	12	18	18
Sightseeing in Carson City	18	22	18
Go to a spa	16	18	17
Golf	15	15	17
Go to the National Automobile Museum	14	21	17
Go to the Nevada Museum of Art	14	18	17
Conduct business	13	17	15

***\*Nightclub was a new activity added in 2015***

Q20-24. Did you participate in any of the following activities during your most recent trip to the Reno area?

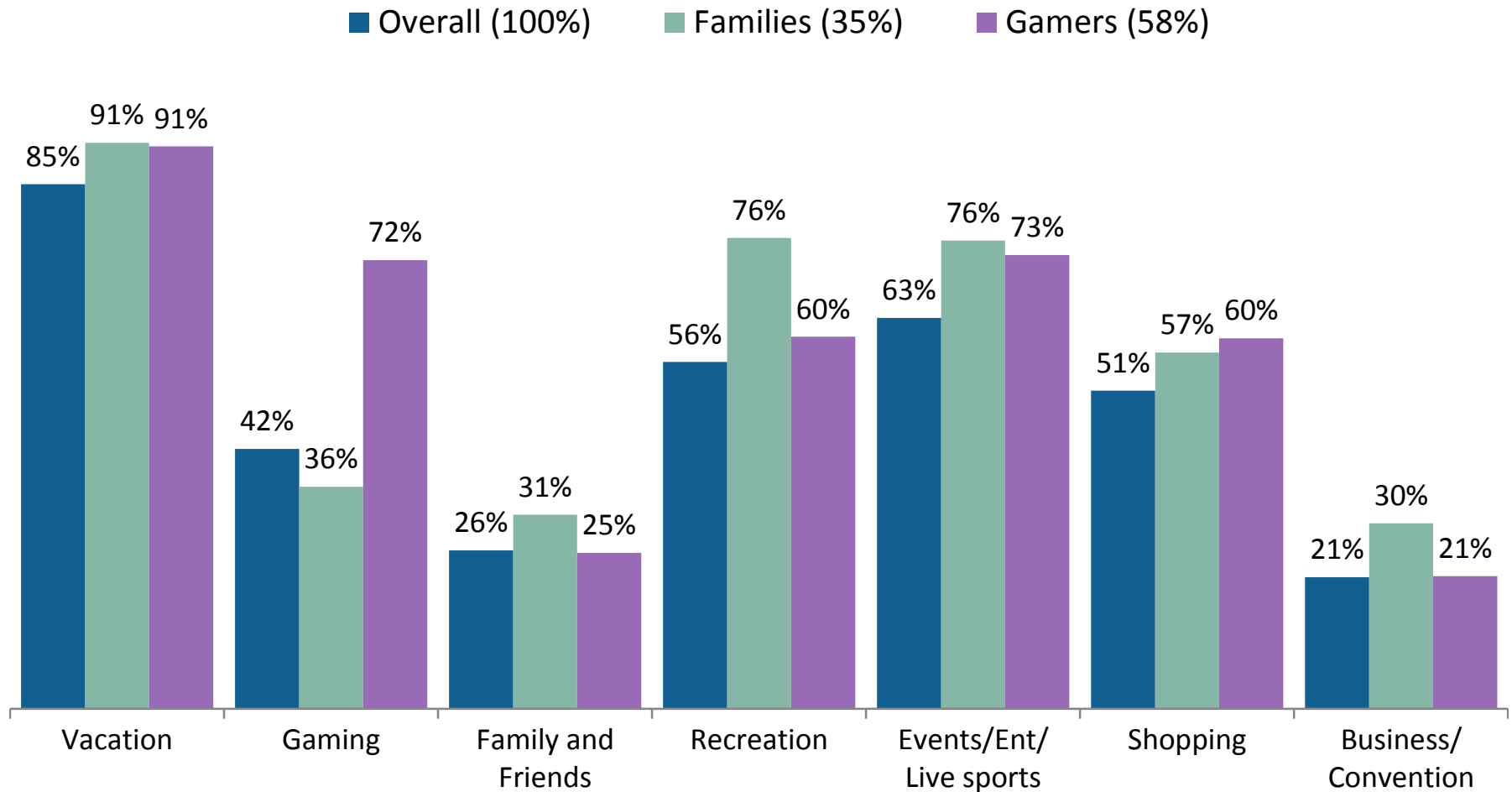
# Self-Reported Participation Categories

*Self-reported gaming continues to decrease.*



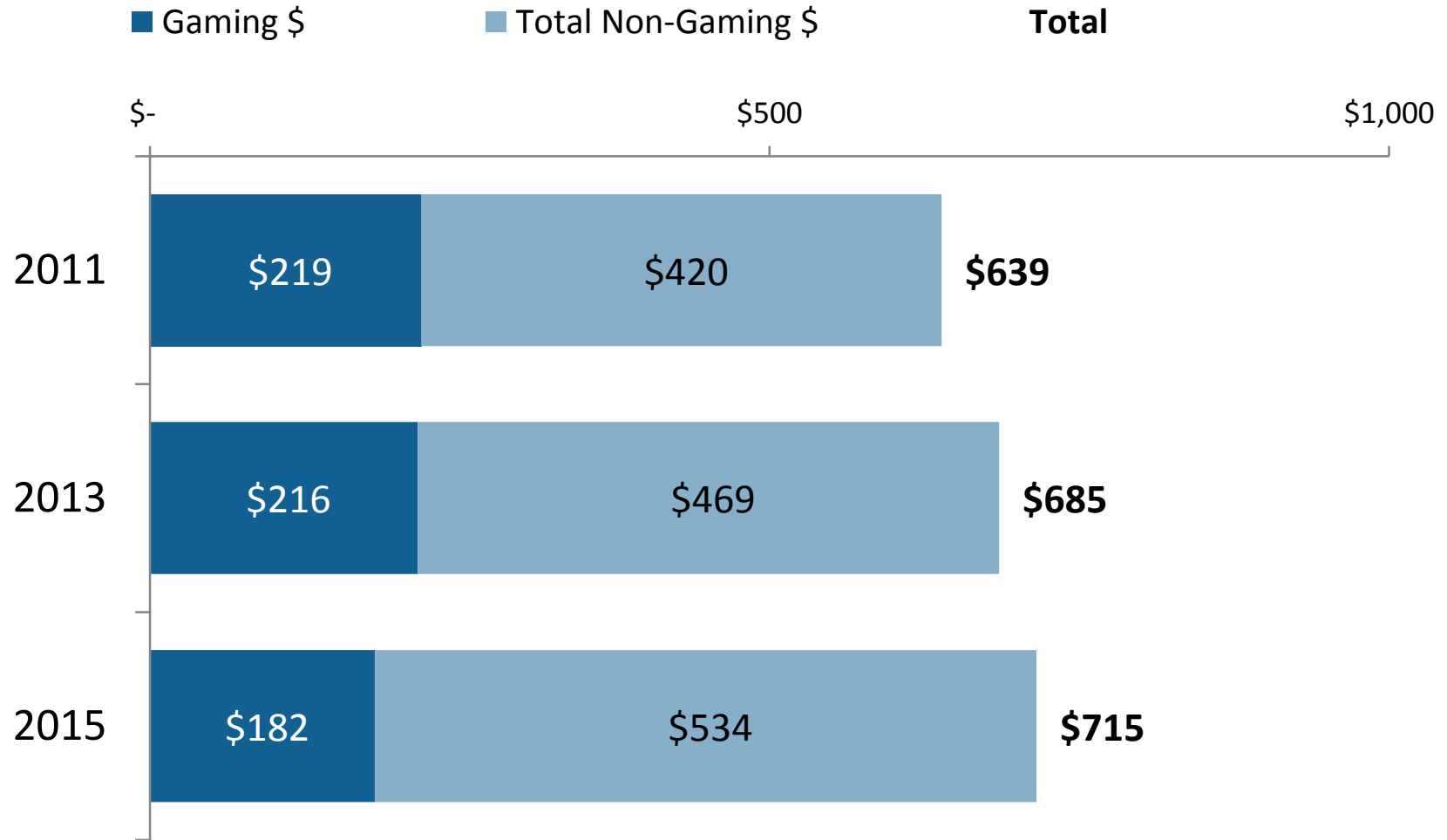
# Self Reported Participation Categories Among Key Demographics

*Families take part in many recreational activities and Gamers take part in many shopping activities.*



# Total Self-Reported Spending

*While self-reported visitor spending continues to rise, they are reporting lower spending on gaming than in past years.*

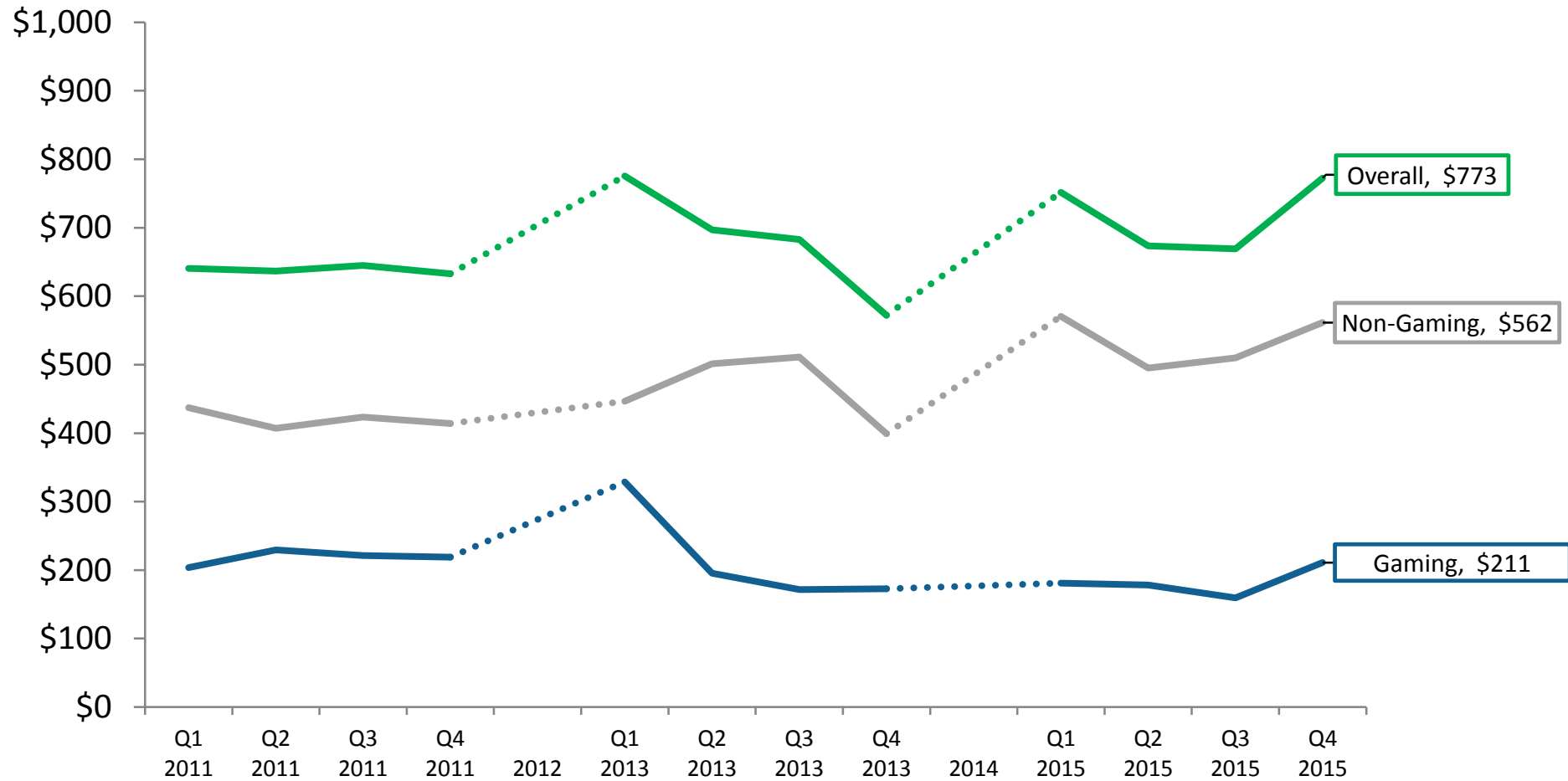


Q26. Thinking about your typical 24-hour day in the Reno area, on average, about how much money did you spend per person, per day for each of the categories below?



# Total Self-Reported Spending by Quarter

*Spending in 2015 increased towards the end of the year for both gaming and other activities.*

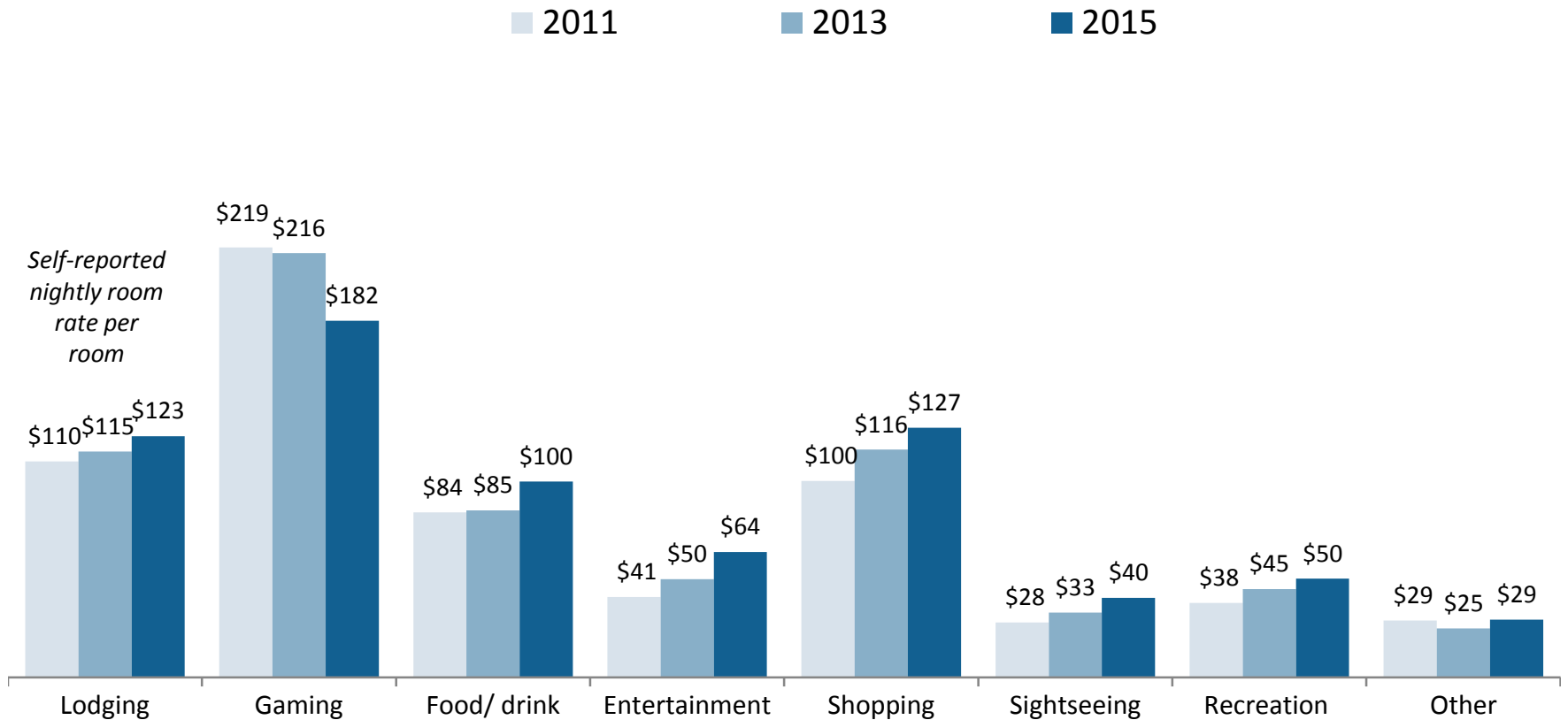


Q26. Thinking about your typical 24-hour day in the Reno area, on average, about how much money did you spend per person, per day for each of the categories below?

# Self-Reported Spending by Category Over Time

*Gaming continues to have the highest average self-reported spend, but the number is dropping while reports of spending in most other categories is growing.*

***On average, how much money did you spend per person, per day for each of the categories below?***



Q12. How much did your accommodations cost per night?

Q26. Thinking about your typical 24-hour day in the Reno area, on average, about how much money did you spend per person, per day for each of the categories below?

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---

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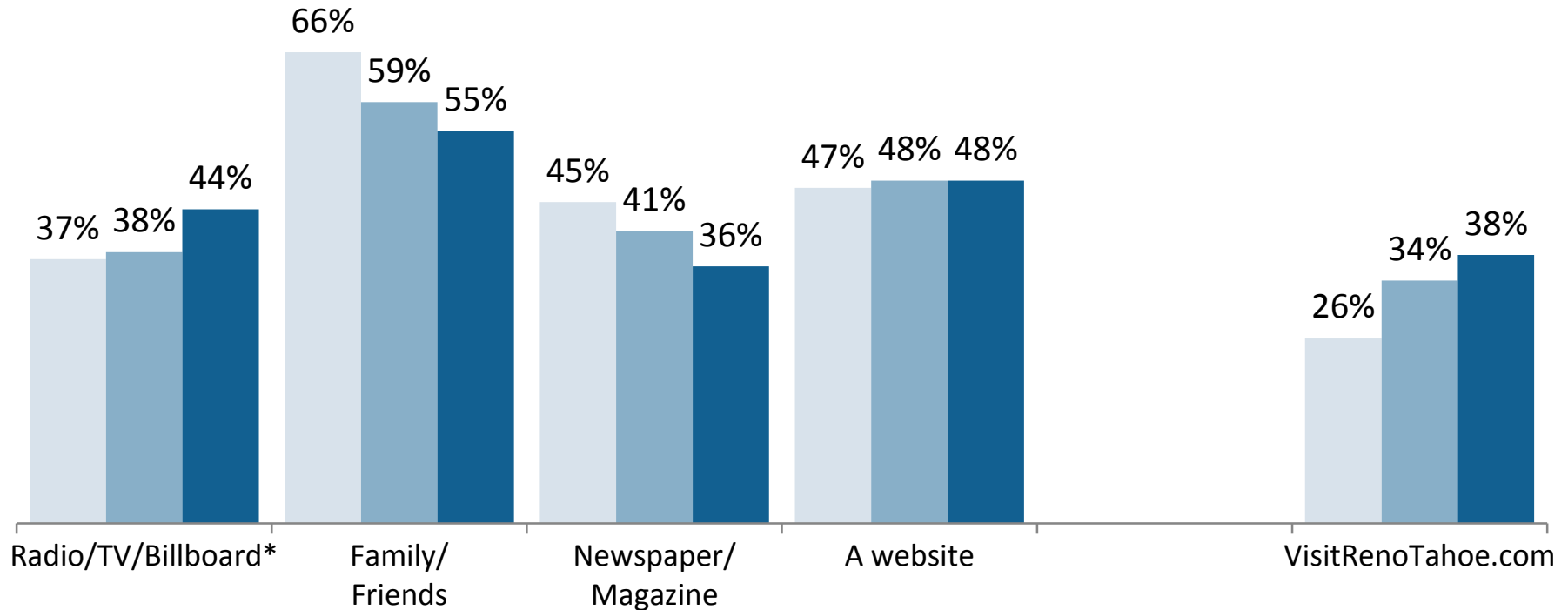
# Reno Media Awareness

*Use of VisitRenoTahoe.com continues to increase.*

**Q33. Prior to your most recent visit, had you seen or heard anything about the Reno area...**

**Q32. Have you ever visited Reno-Tahoe's website, [www.VisitRenoTahoe.com](http://www.VisitRenoTahoe.com)?**

■ 2011      ■ 2013      ■ 2015



Q33. Prior to your most recent visit, had you seen or heard anything about the Reno area...

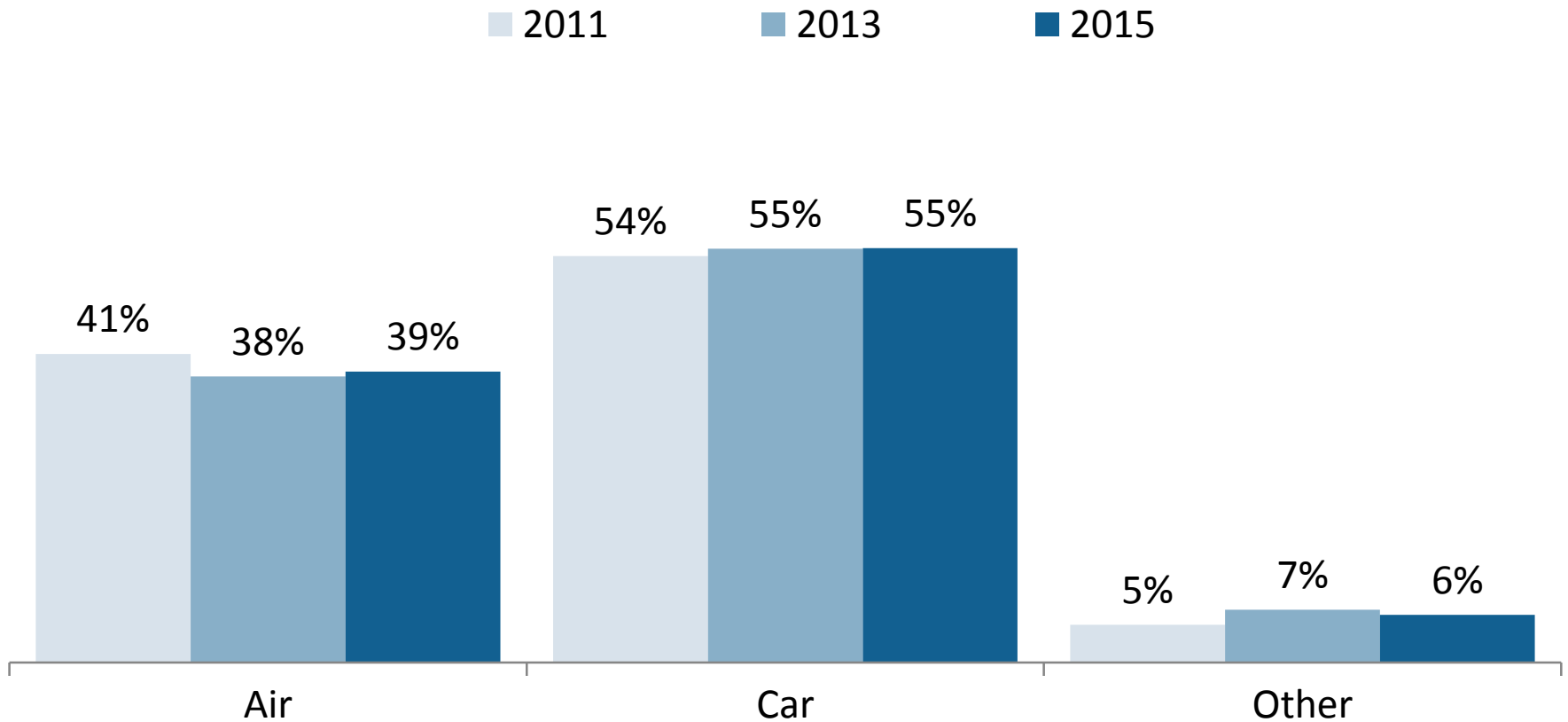
Q32. Have you ever visited Reno-Tahoe's website, [www.VisitRenoTahoe.com](http://www.VisitRenoTahoe.com)?

\*In 2015 "Radio or TV" was asked separately from "Billboard". In this chart those categories are combined for tracking. "Radio or TV": 34%, "Billboard": 31% (responses overlap)

# Travel Mode

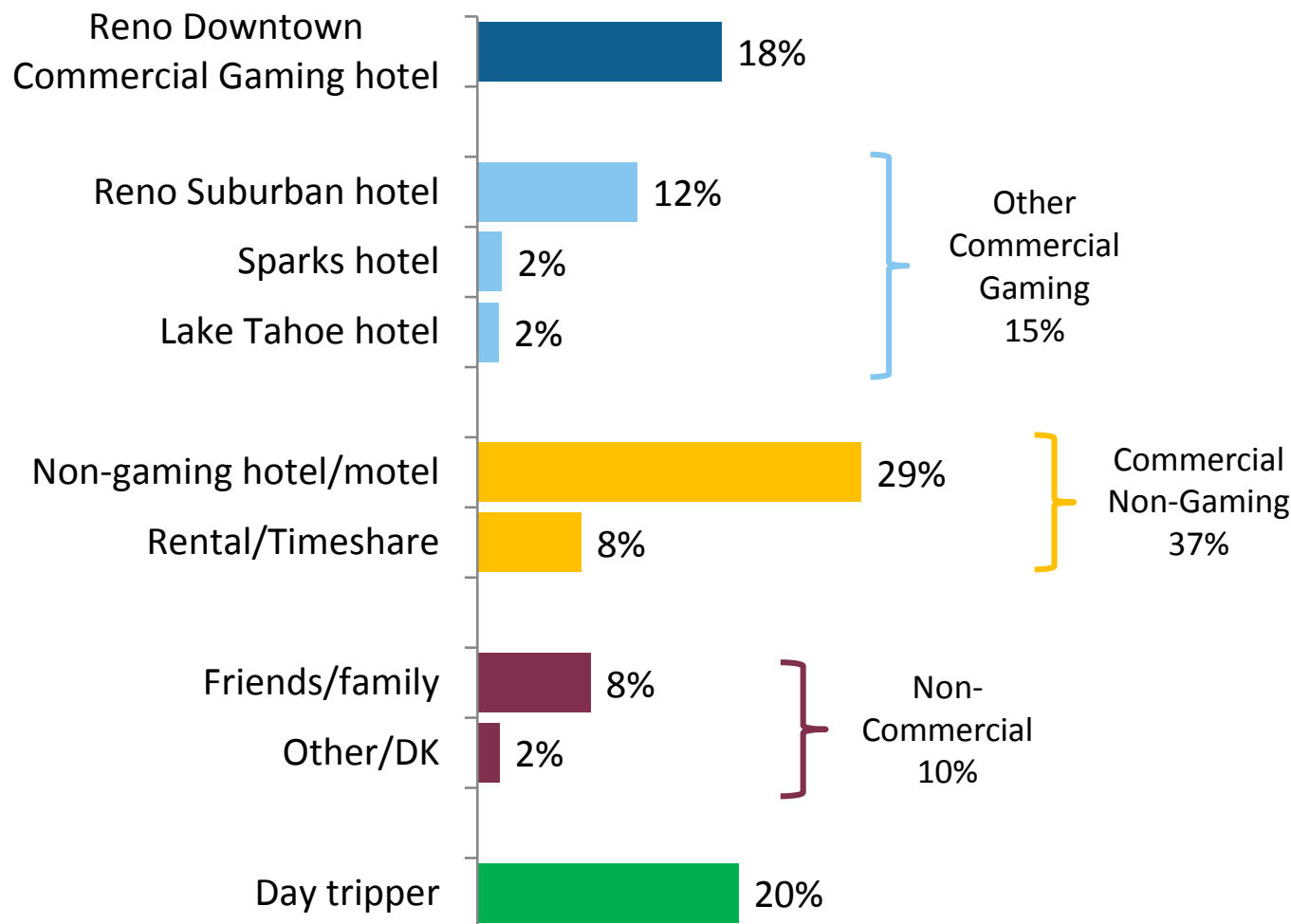
*A majority of Reno visitors came to the area by car.*

***What was your primary method of travel to the Reno area?***



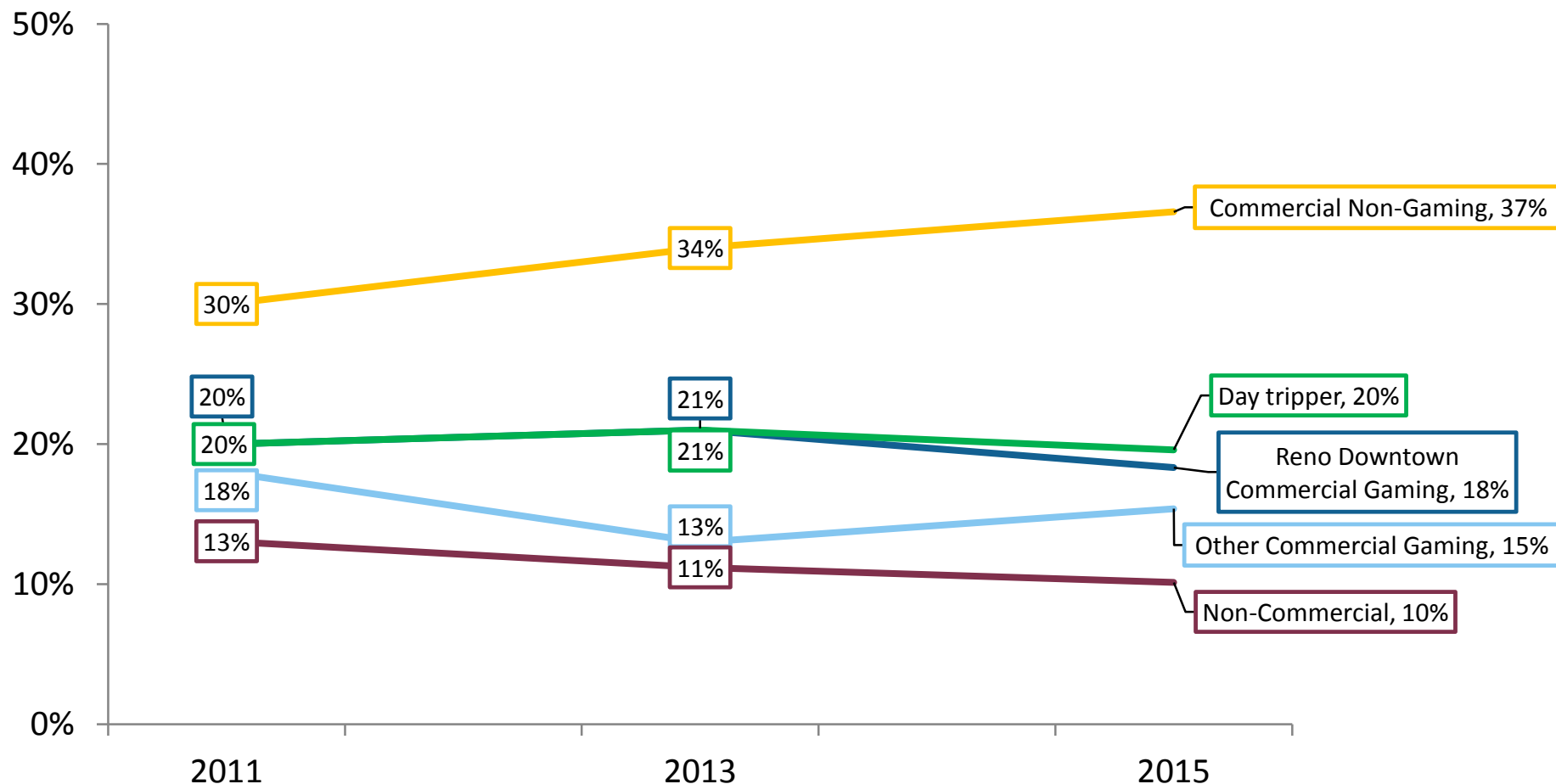
# Overnight Accommodations

*Commercial non-gaming accommodations make up more than a third of all accommodations.*



# Overnight Accommodations Over Time

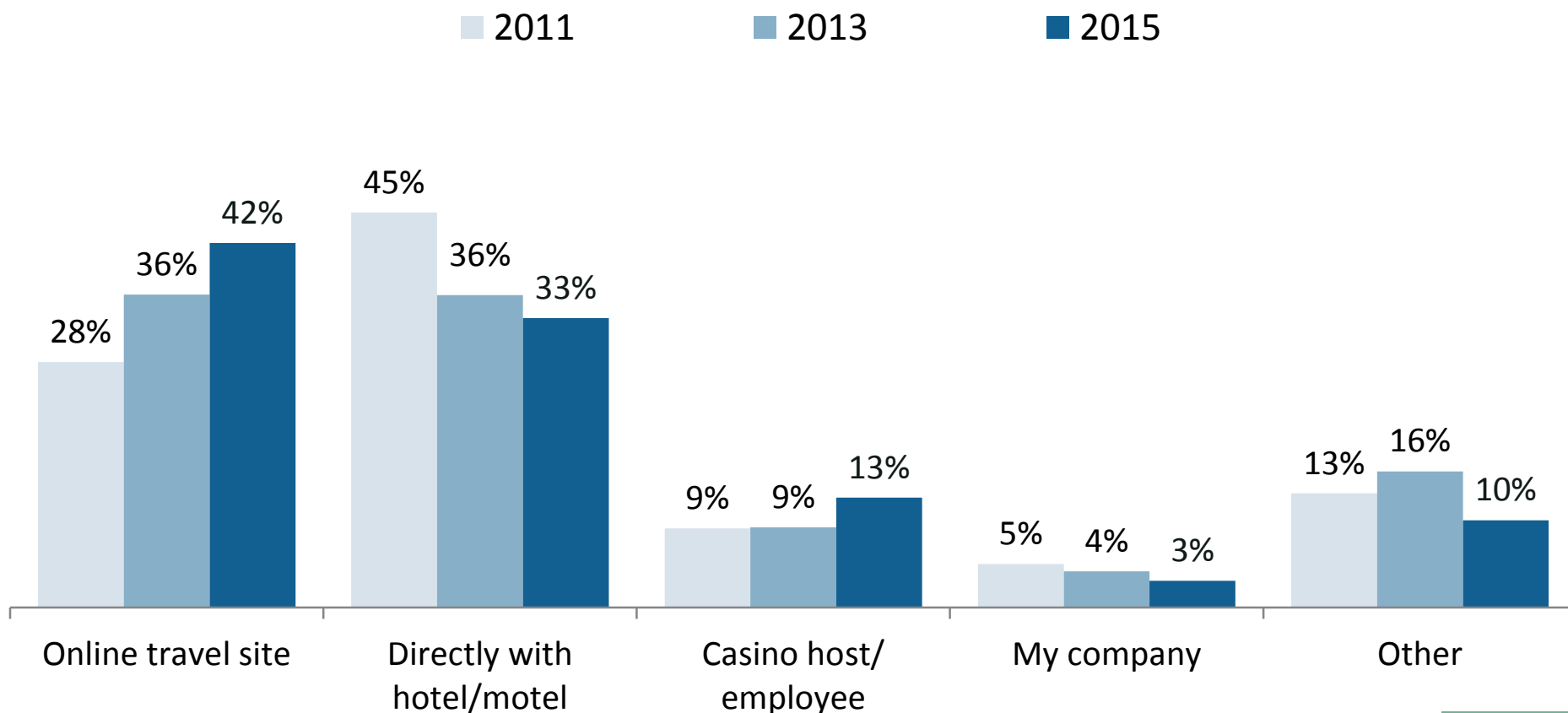
*Commercial non-gaming accommodations make up a growing share of stays.*



# Lodging Reservation

*A smaller share of visitors are making lodging reservations directly with the property than in years past.*

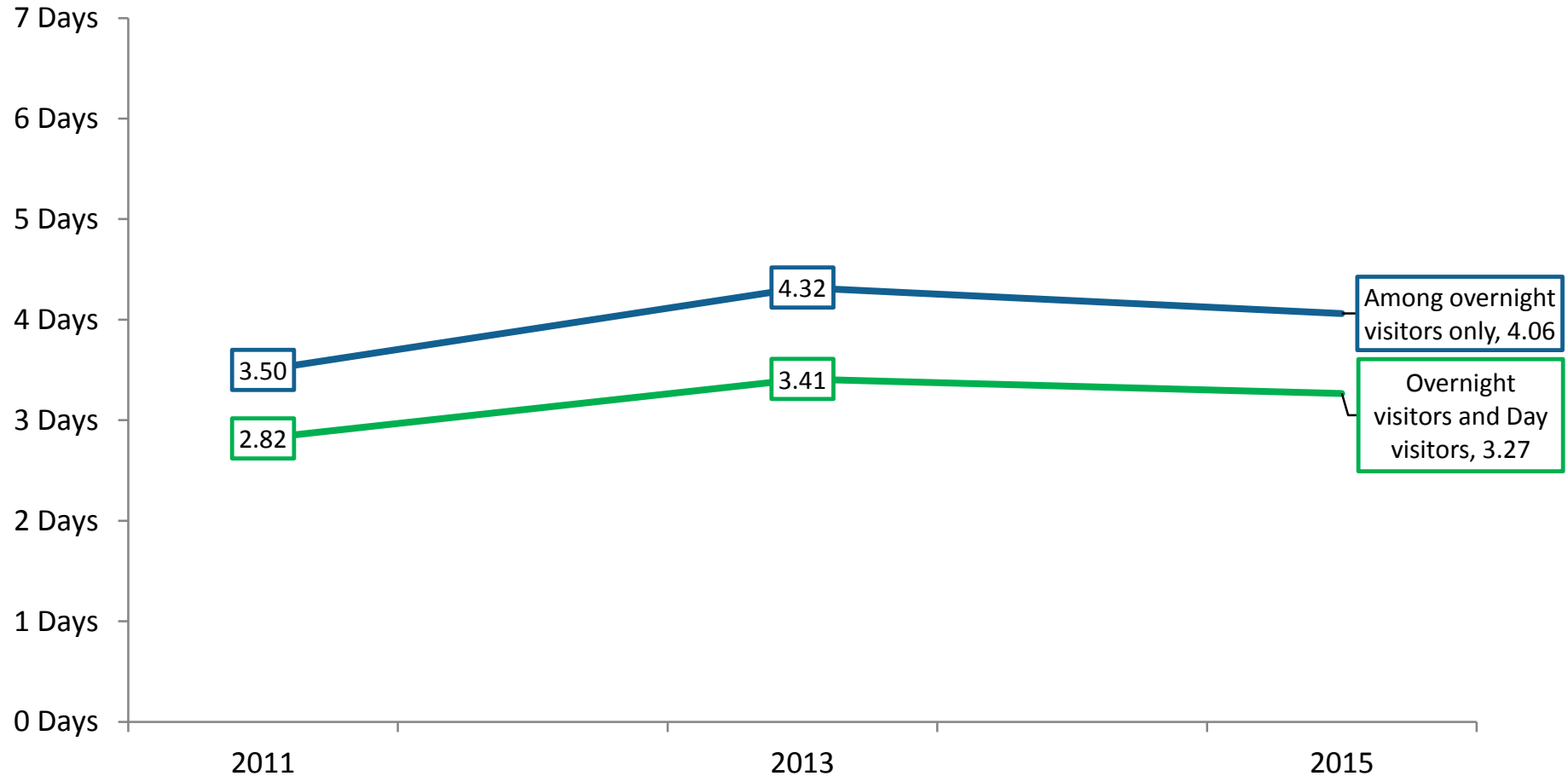
***How did you make your lodging or hotel reservations?***





# Average Length of Stay

*Average visit length is consistent with 2013.*

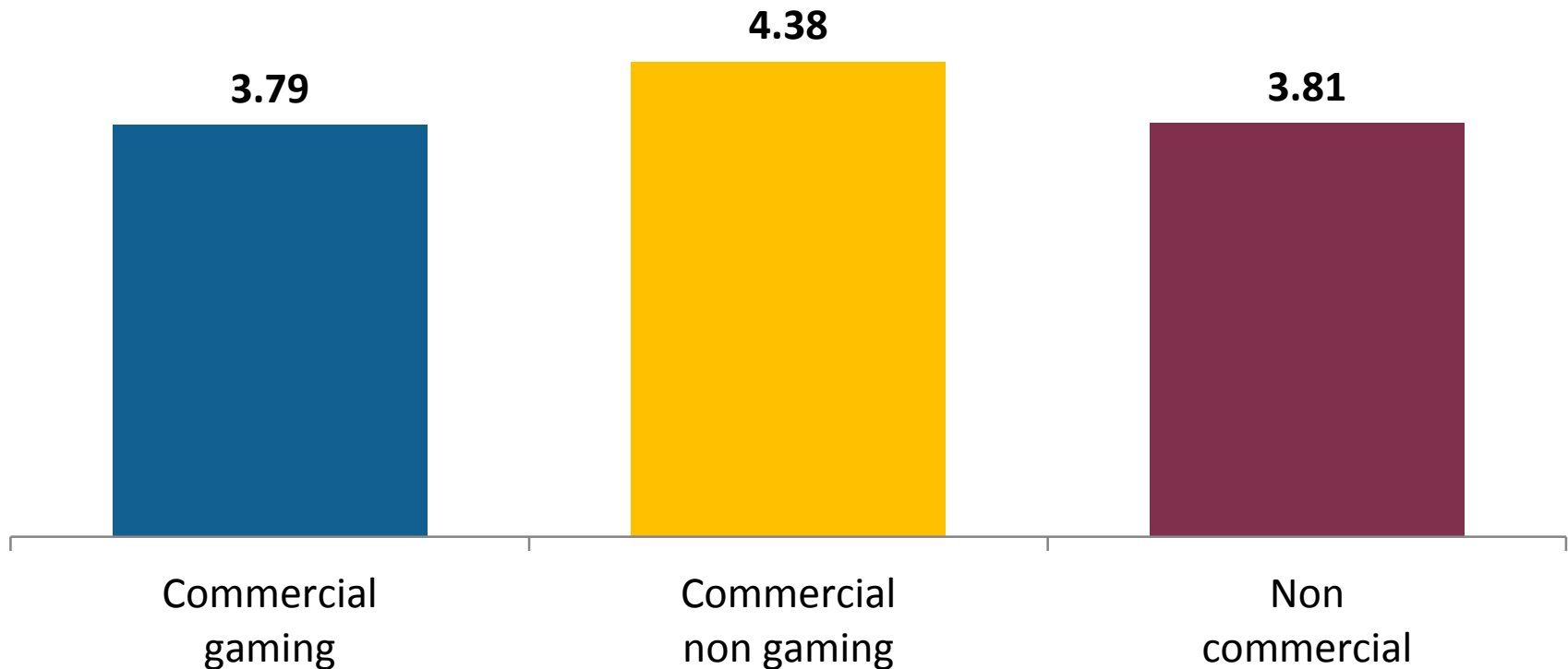


Q7. How many nights did you spend in the Reno area on your most recent trip? Please indicate the number of nights you spent in a hotel or other accommodations, not the number of days you spent in the area.

# Average Length of Stay among Property Type

*Respondents that stay in a gaming property report spending nearly four nights in Reno.*

## *Average nights stayed in Reno*

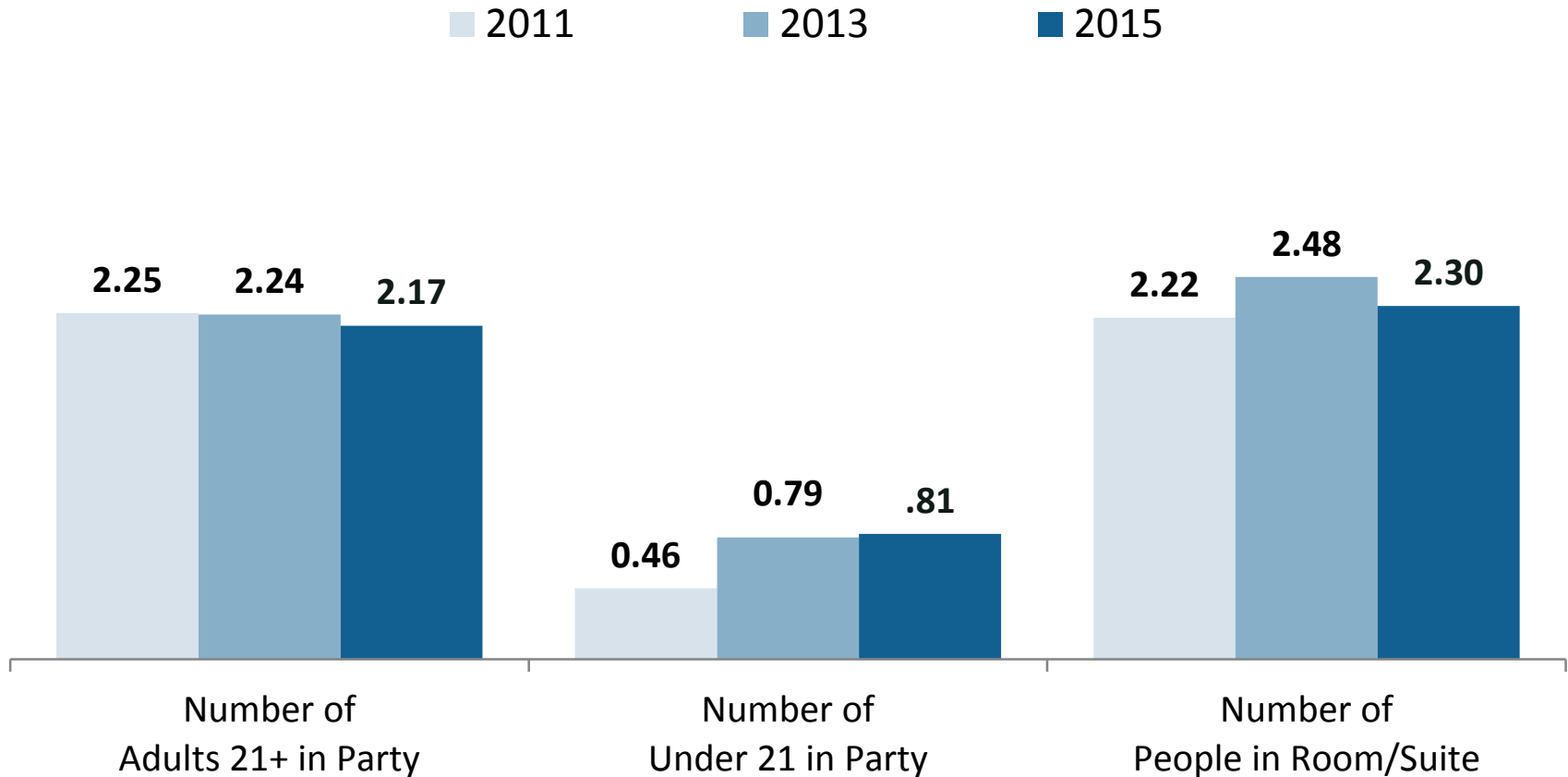


Q9. Where did you stay?

Q7. How many nights did you spend in the Reno area on your most recent trip? Please indicate the number of nights you spent in a hotel or other accommodations, not the number of days you spent in the area.

# Party Size

*Party size has not changed significantly since 2013.*



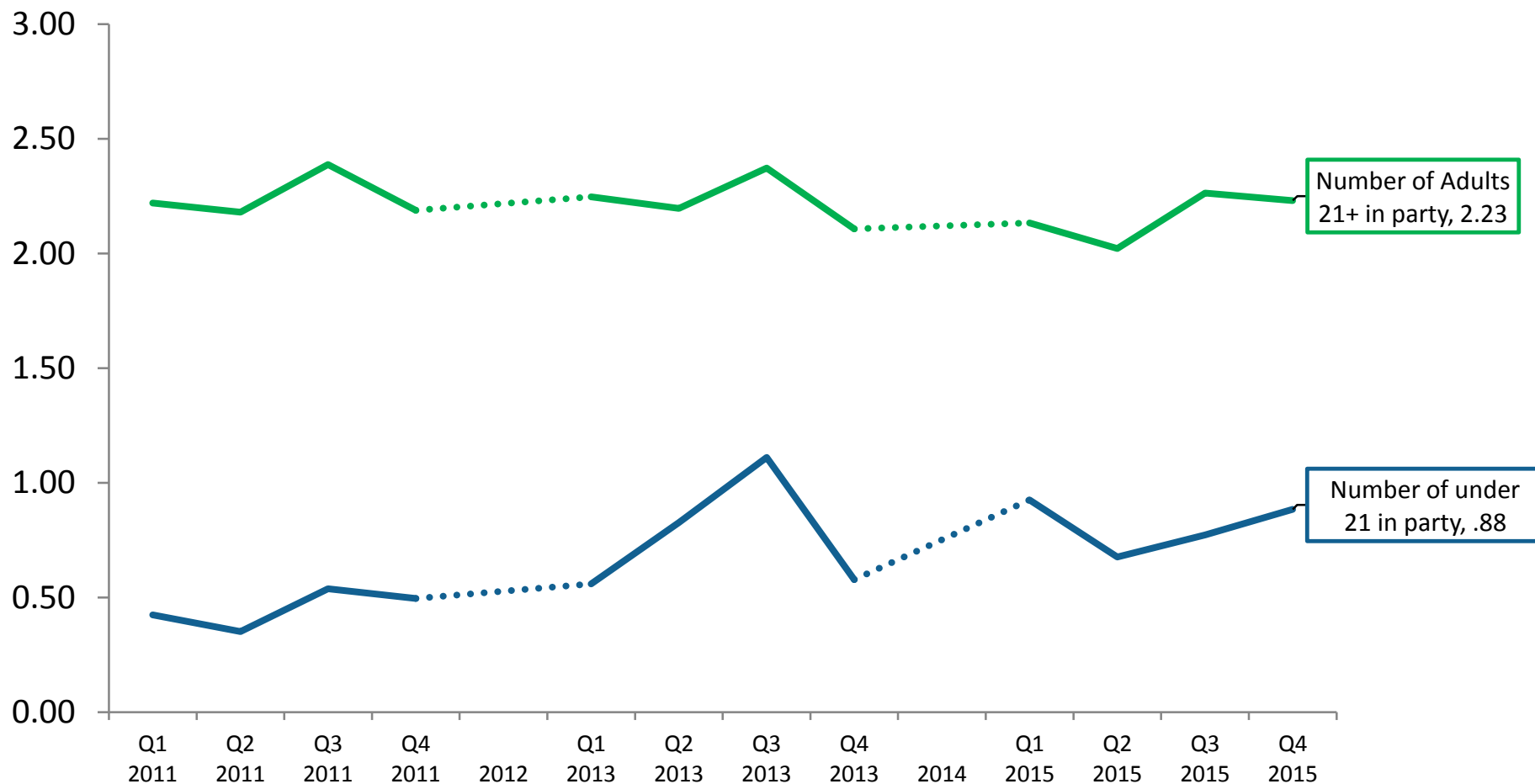
Q17. Including yourself if over 21, how many adults **age 21 or over** were with you in your immediate party?

Q18. Including yourself if under 21, how many persons **under age 21** were with you in your immediate party?

Q19. **(IF Q4=1 overnight visitor and Q8=not 3, not Friends or family)** Including yourself, how many people stayed in your room or suite?

# Party Size by Quarter

*Party size peaks during the summer months.*



Q17. Including yourself if over 21, how many adults age 21 or over were with you in your immediate party?

Q18. Including yourself if under 21, how many persons under age 21 were with you in your immediate party?

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---

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- 7) Focus on Families
- 8) Focus on Millennials
- 9) Focus on Infrequent Visitors

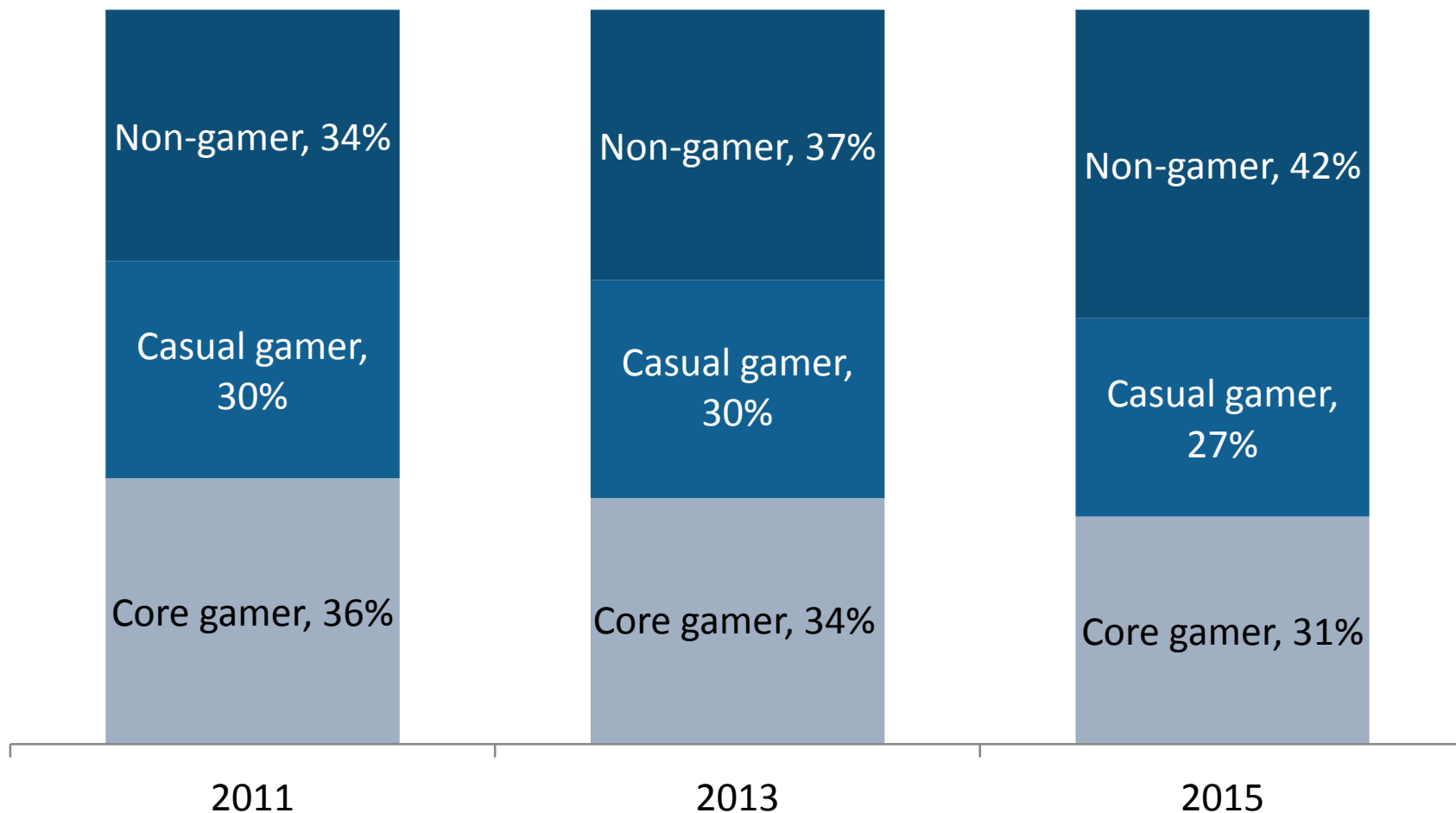
# Focus on Gamers

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- ▶ A greater share of Reno visitors did not report spending money on gaming in 2015 as compared with prior years. However, they are more likely to report general casino visitation over the last year.
- ▶ Gamers make up 58% of visitors to Reno, with about half of those considered serious gamers, and the other half more casual gamers.
- ▶ Gamers report higher spend and participation in both gaming and non-gaming activities, compared with overall visitors.

# Visitor Share by Gaming Over Time

*The share of visitors who report not gaming continues to grow.*

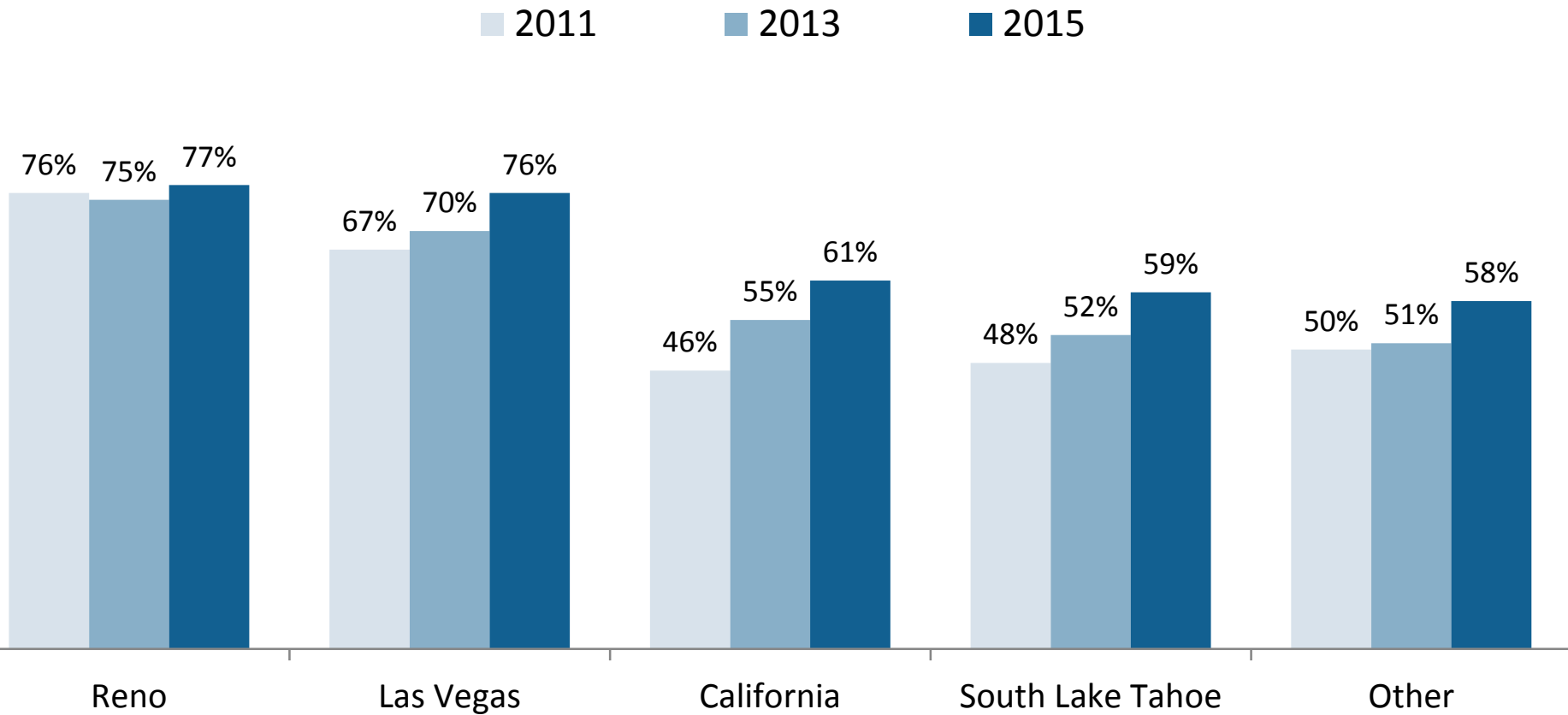


*"Core Gamer" spent \$100+ on gaming OR [stayed in a gaming property AND spent more than \$50 on gaming]*

*"Casual Gamer" spent \$1-\$99 on gaming OR [stayed at gaming property AND spent less than \$50 on gaming]*

# Casino Visitation in the Last Year

*Compared to previous years, more respondents report visiting casinos in Reno as well as other gaming locations.*



Q31. In the last 12 months, about how often would you say you have visited casinos in the following locations?



# Gamer Groups

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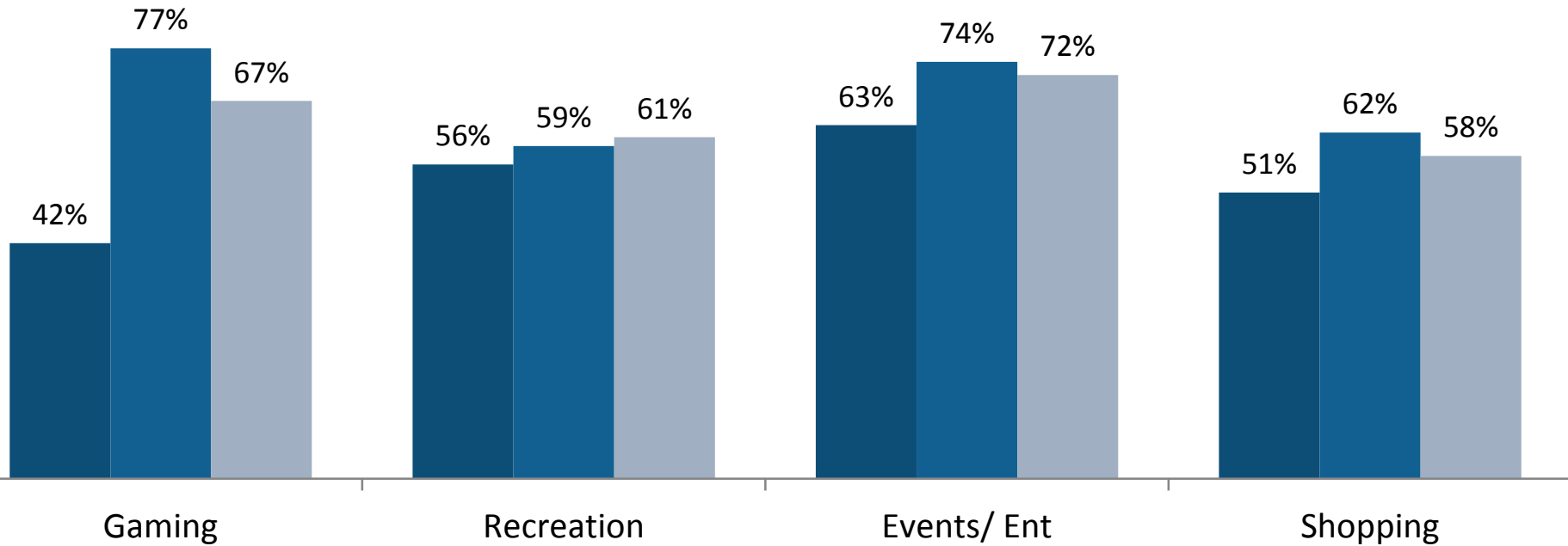
*Gamers were split into Core gamers and Casual Gamers.*

Gamer (58%)		Core gamer (31%)	Casual gamers (27%)
Reports gaming as an activity or spent any amount of money on gaming.		Spent more than \$100 on gaming OR stayed in a gaming property and spent more than \$50 gaming.	Spent less than \$100 on gaming but more than \$0 dollars OR stayed at gaming property and spent less than \$50 gaming.

# Activities Among Gamer Categories

*While gamers are much more likely to report engaging gaming on their most recent trip, they are also more likely to report engaging in other activities as well.*

■ All Visitors   ■ Core Gamer (31%)   ■ Casual Gamer (27%)

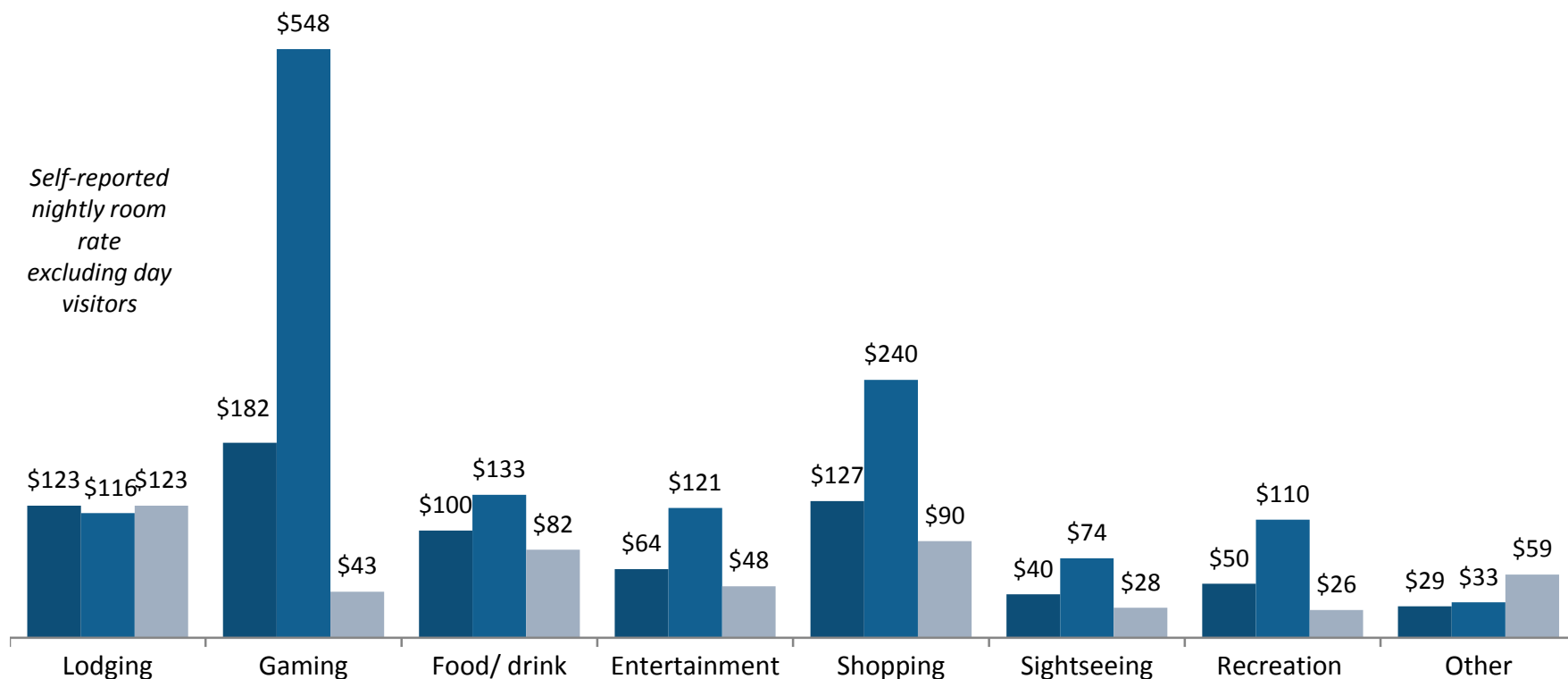


# Spend Among Gamer Categories

*Core gamers report spending more on most things than casual gamers or visitors overall.*

***On average, how much money did you spend per person, per day for each of the categories below?***

■ All Visitors ■ Core Gamer (31%) ■ Casual Gamer (27%)

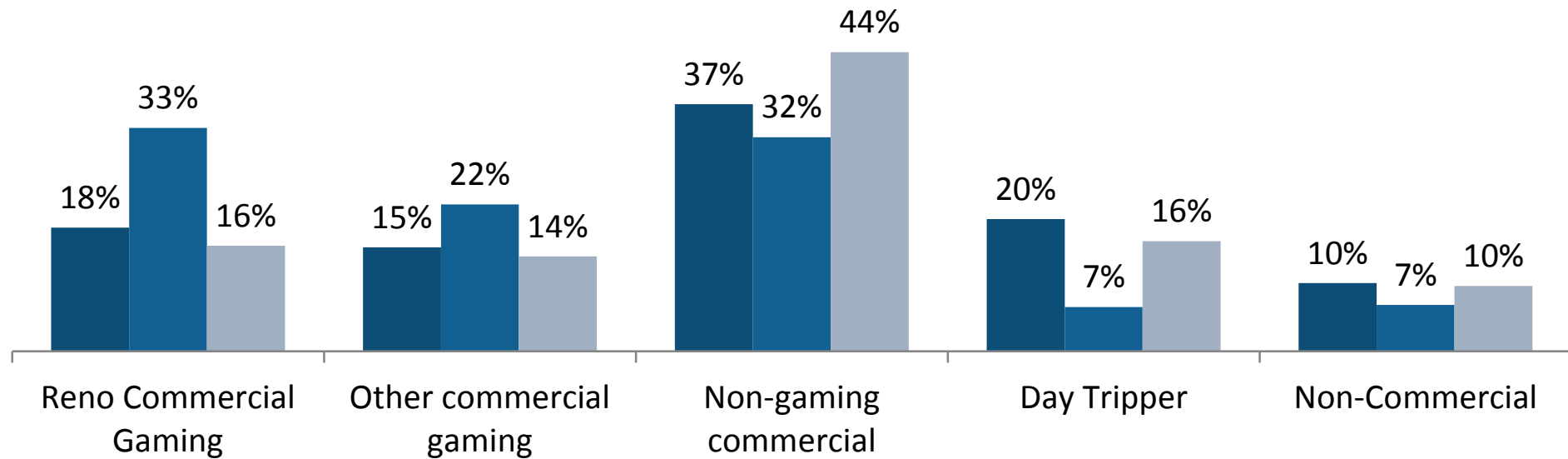


Q26. Thinking about your typical 24-hour day in the Reno area, on average, about how much money did you spend per person, per day for each of the categories below?

# Core Gamers and Casual Gamers Accommodations

*Core gamers are more likely to stay in gaming properties.*

■ All Visitors   ■ Core Gamer (31%)   ■ Casual Gamer (27%)



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---

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- 9) Focus on Infrequent Visitors

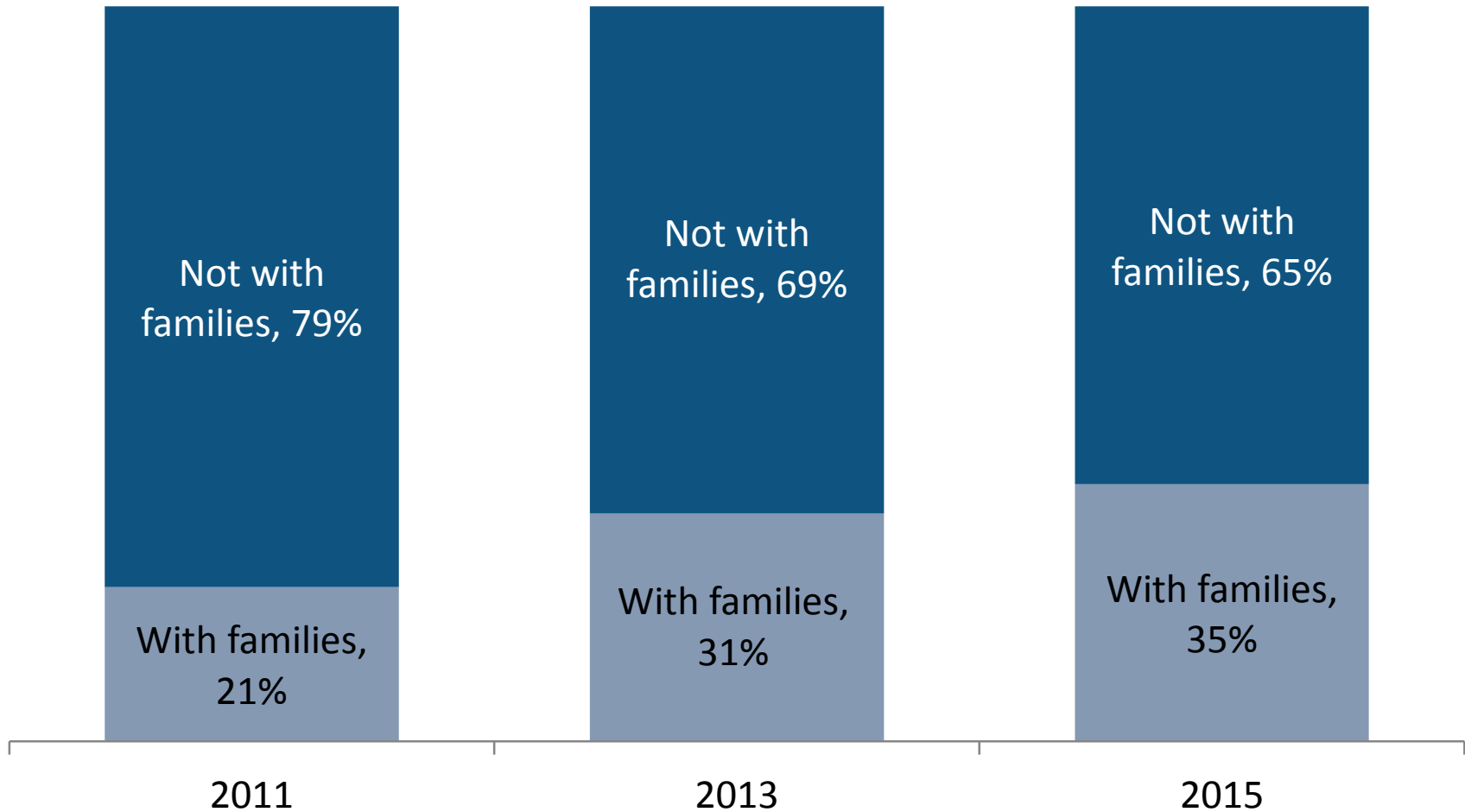
# Focus on Families

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- ▶ 35% of Reno visitors report visiting with a family, meaning an adult visitor who is traveling with a minor.
- ▶ Families are more likely to spend 4 or more nights in Reno on their trip than other visitors.
- ▶ Families spend more money in all different categories of activities and are very likely to take part in recreational activities and events.
- ▶ Families are more likely to visit [VisitRenoTahoe.com](http://VisitRenoTahoe.com).

# Visitor Share by Family Presence Over Time

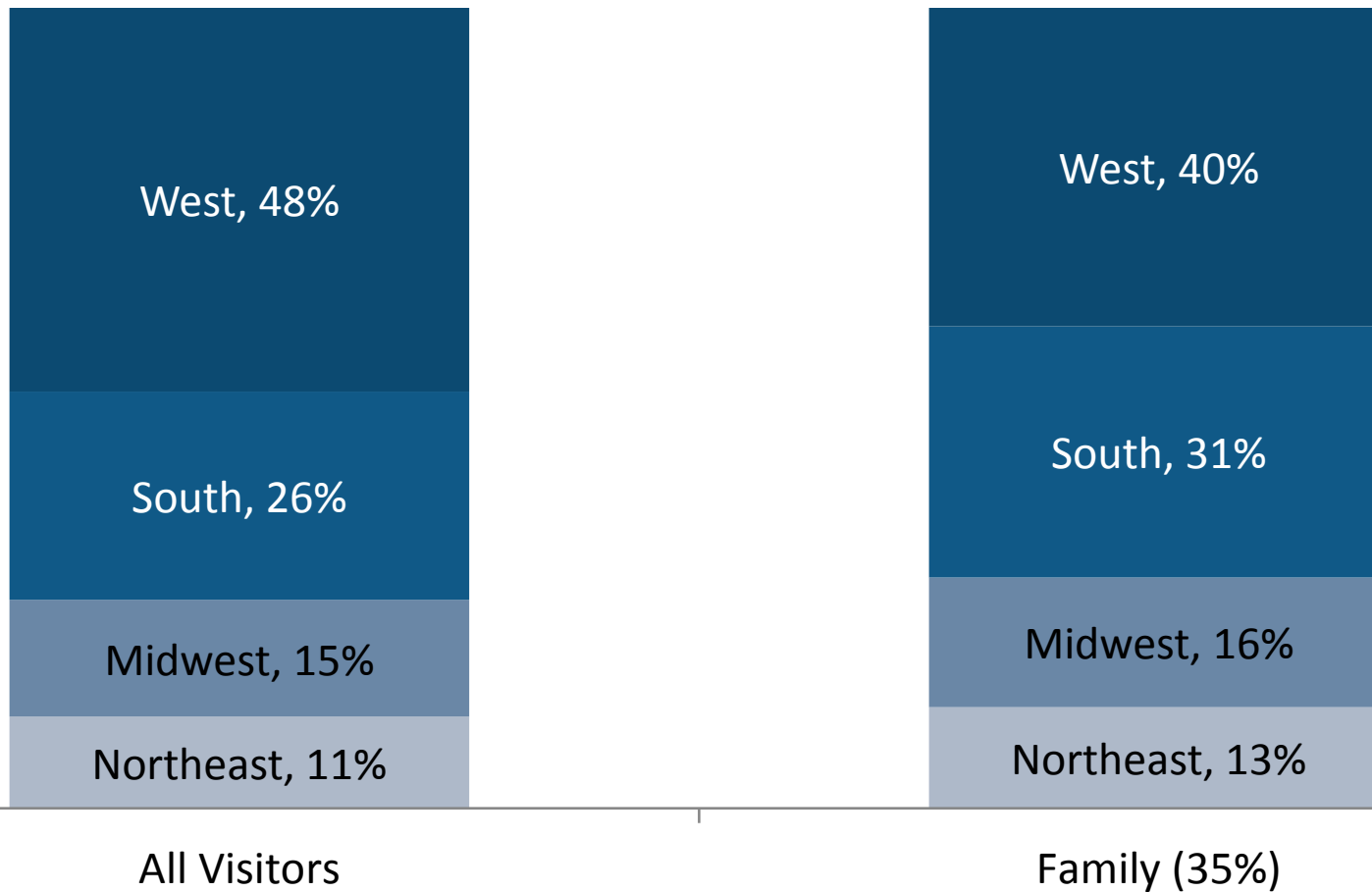
*A greater percentage of Reno visitors come in family groups than in prior years.*



*"With Families" either have children and report having someone under 21 in their travel party OR are over 30 and report having someone under 21 in their travel party.*

# Family Visitors: Origin State

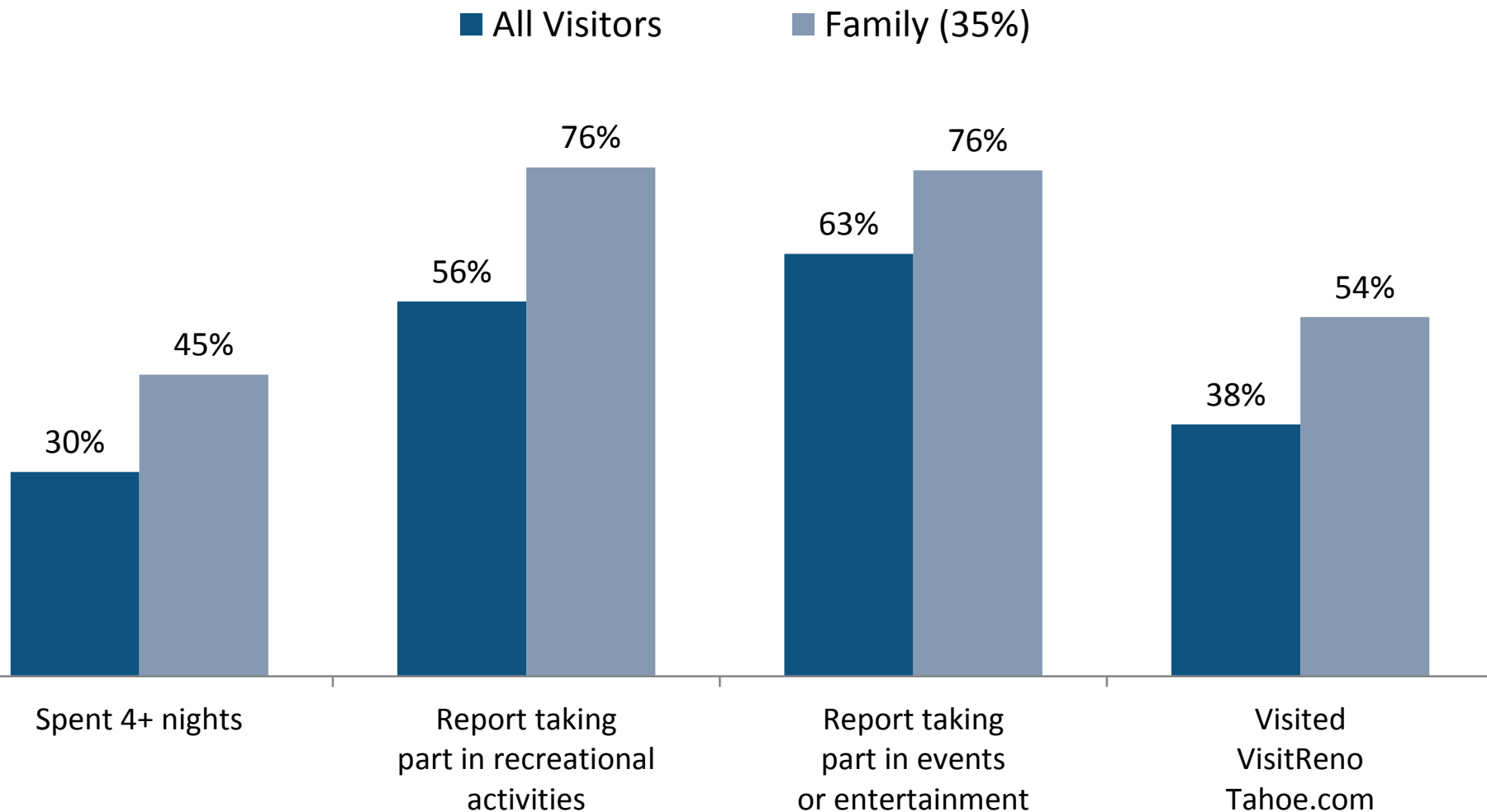
*Those who visit with children are more likely to come from outside the Western states.*





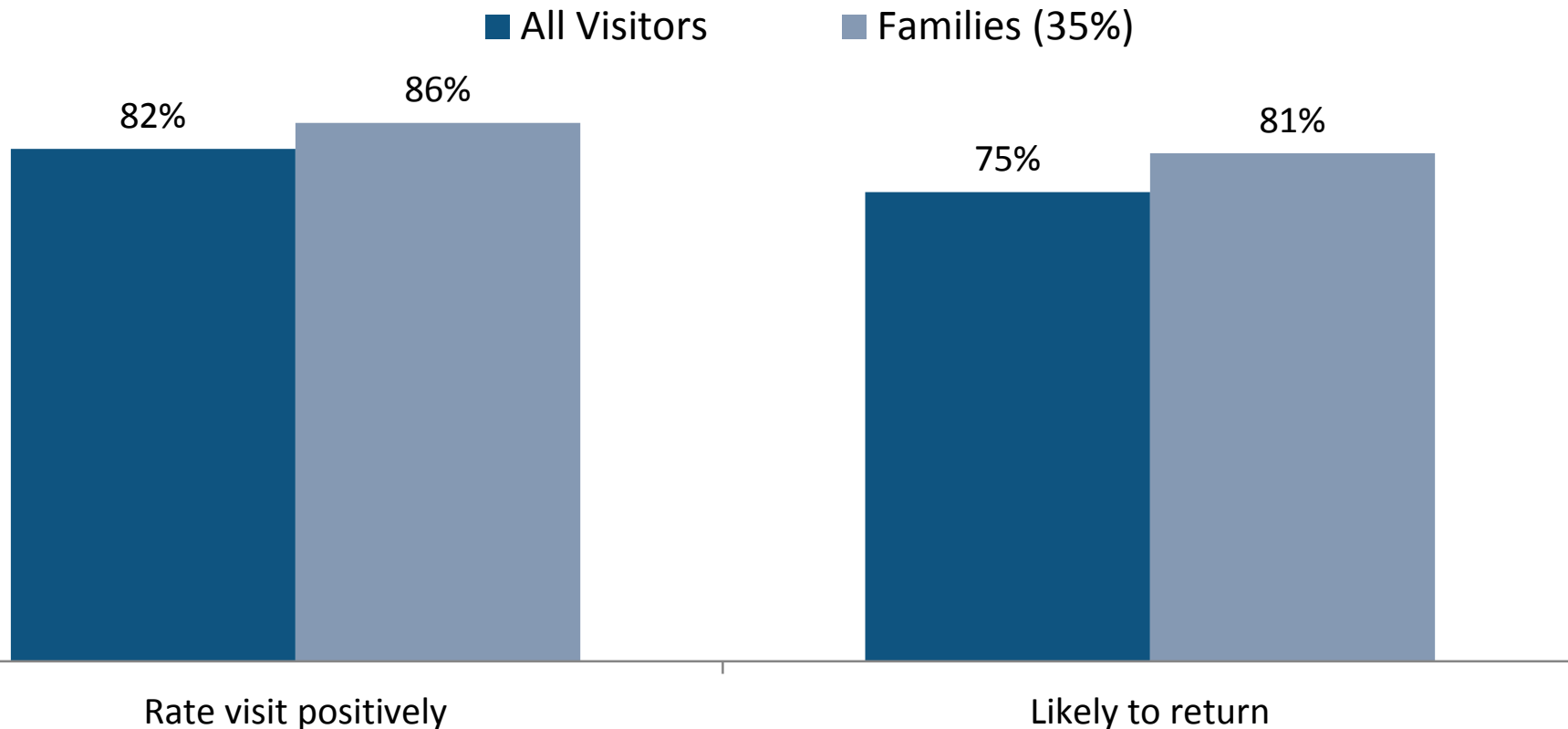
# Family Visit Details

*Those who visit with children are more likely to report participating in recreational activities and attend events. They also tend to stay more nights, and visit the website.*



# Family Visitors: Visit Satisfaction

*Those who visited with families were highly satisfied with their visit, and most believe they will return.*



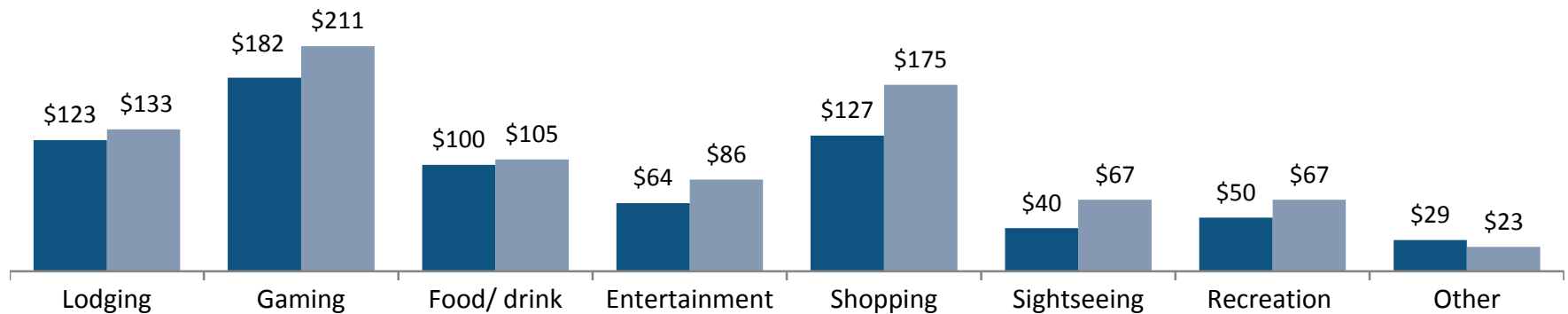
# Spend Among Family Visitors

*Those who visit with families report spending more per person in most all categories.*

***On average, how much money did you spend per person, per day for each of the categories below?***

■ All Visitors      ■ Family (35%)

*Self-reported  
nightly room  
rate  
excluding day  
visitors*

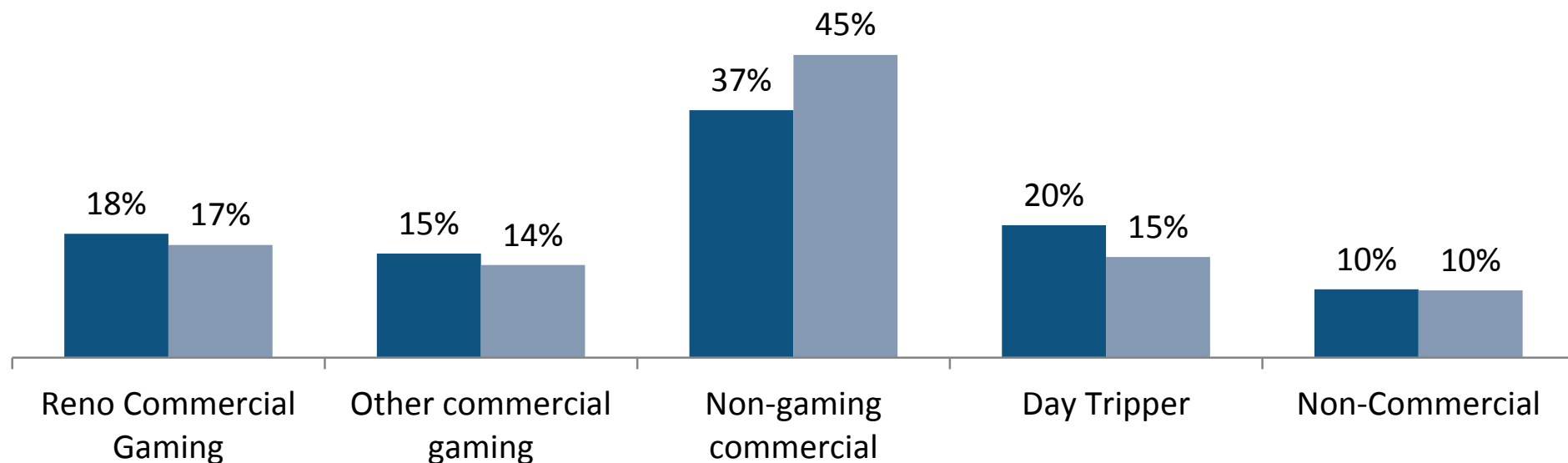


Q26. Thinking about your typical 24-hour day in the Reno area, on average, about how much money did you spend per person, per day for each of the categories below?

# Family Visitor Accommodations

*Family accommodations are similar to other visitors accommodation.*

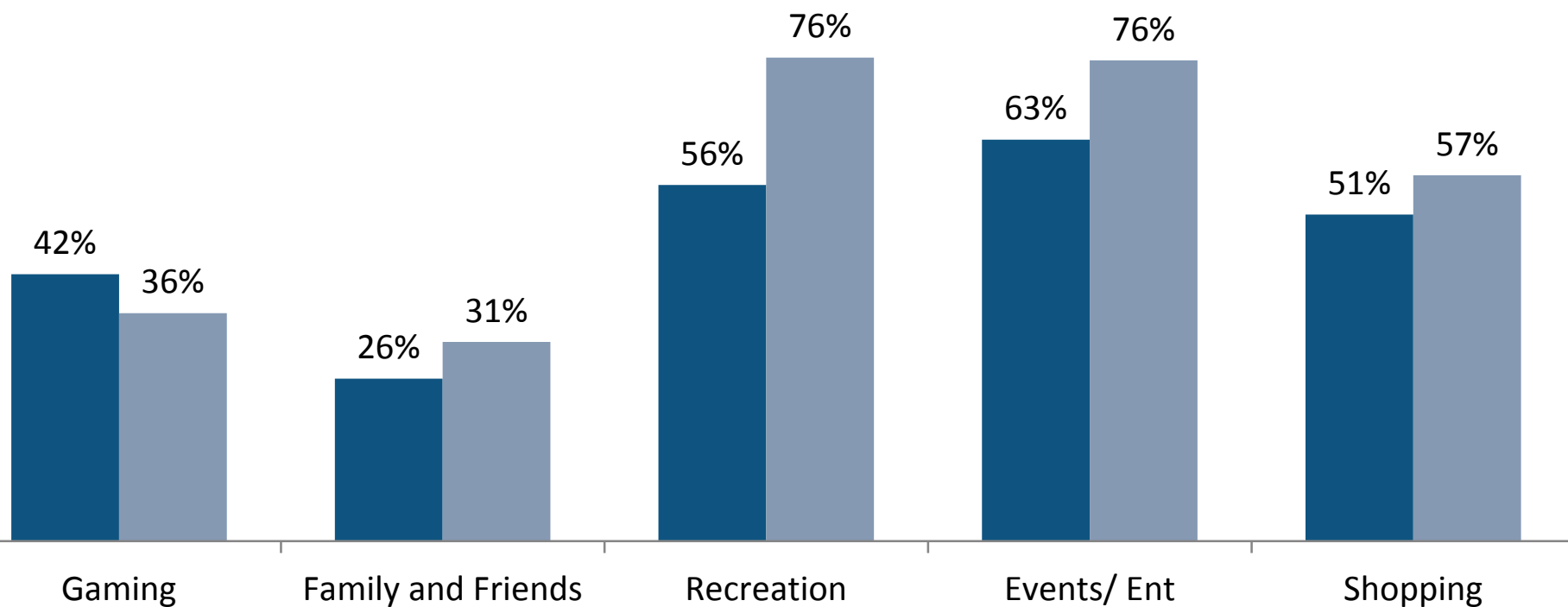
■ All Visitors      ■ Family (35%)



# Family Visitor Activities

*Family visitors are significantly more likely to participate in recreational activities, as well as attend events.*

■ All Visitors      ■ Family (35%)



# Contents

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- 1) Methodology, Key Findings
- 2) Key Demographics
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- 4) Activities and Spend
- 5) Trip and Accommodation Planning
- 6) Focus on Gamers
- 7) Focus on Families
- 8) **Focus on Millennials**
- 9) Focus on Infrequent Visitors

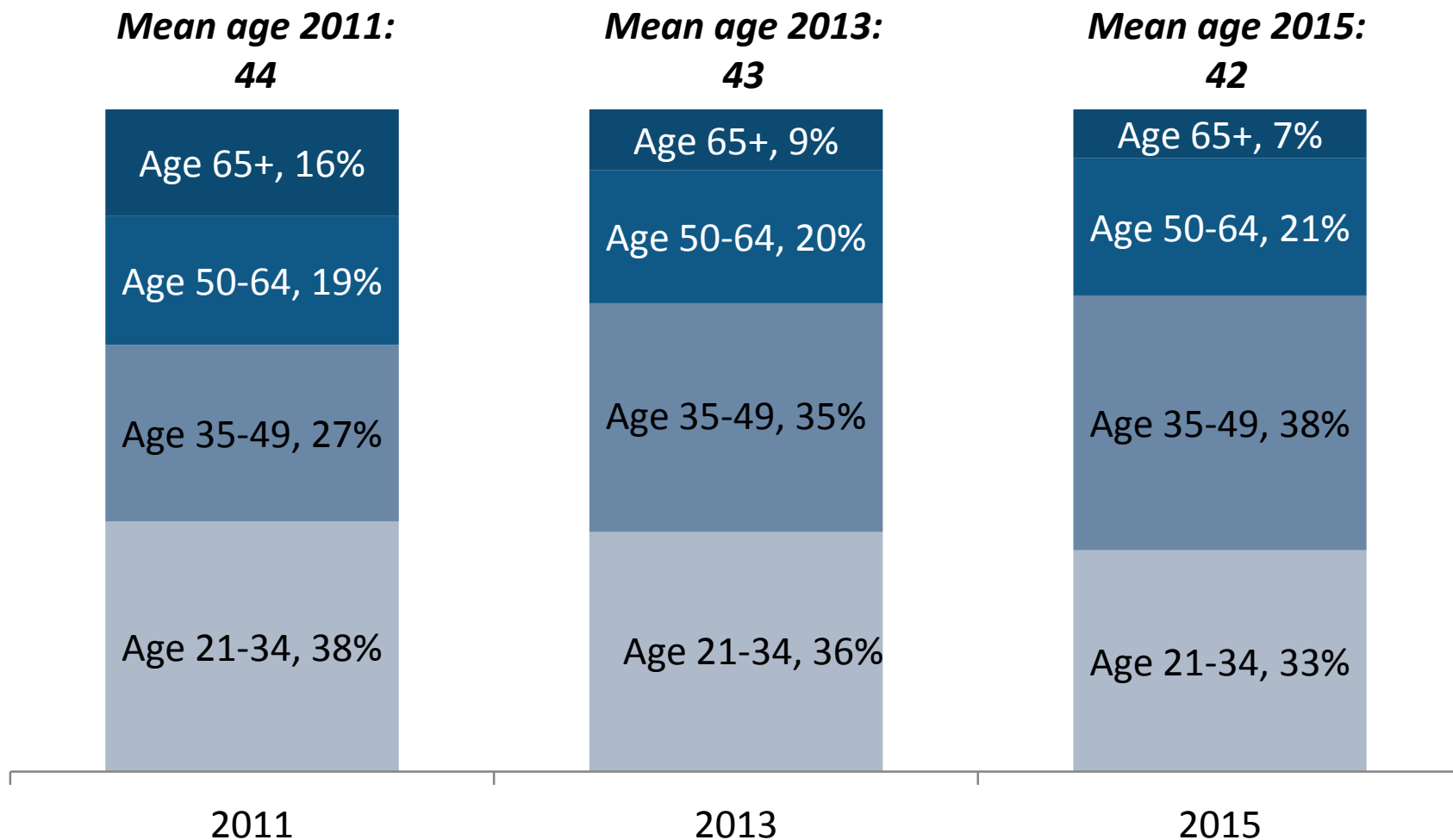
# Focus on Millennials

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- ▶ Millennials (age 21-34) made up 33% of Reno visitors in 2015.
- ▶ Millennials are just as pleased with their visit experience as all visitors.
- ▶ While millennials make similar lodging choices as visitors overall, they report higher average lodging spend.
- ▶ Millennials report participating more in recreational activities and events compared to other visitors, and are less likely to report gaming as an activity.

# Visitor Share by Age Over Time

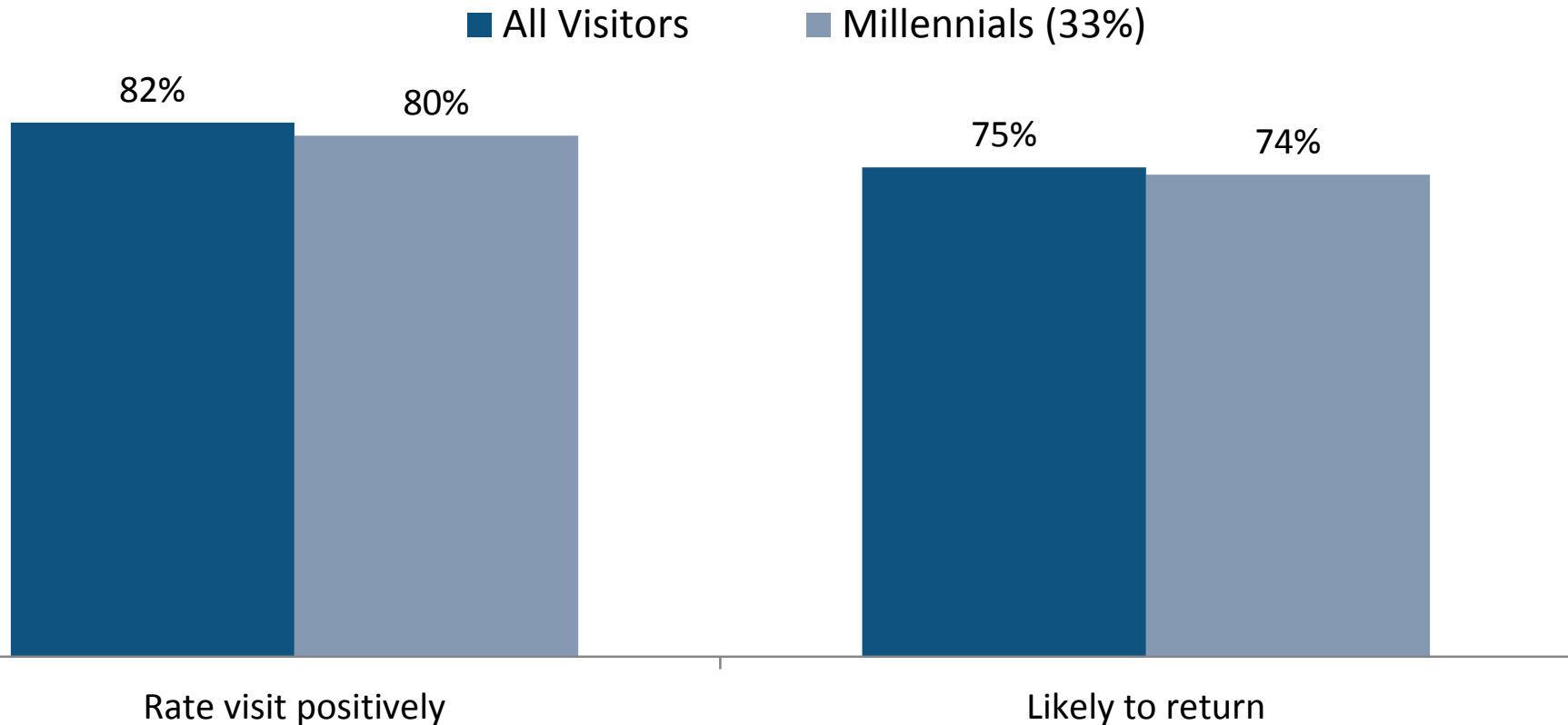
*Seniors and millennials make up a declining share of Reno visitors, while the overall mean visitor age remains in the low 40s.*





# Millennials: Visit Satisfaction

*Millennial satisfaction and intent to return mirrors that of all visitors.*



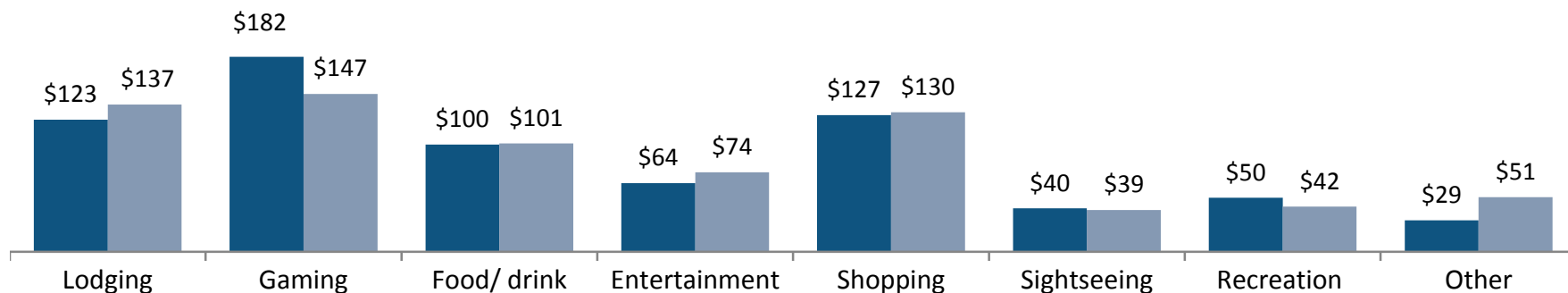
# Spend Among Millennials

*Millennials report spending more on lodging and less on gaming than visitors overall.*

***On average, how much money did you spend per person, per day for each of the categories below?***

■ All Visitors      ■ Millennials (33%)

*Self-reported  
nightly room  
rate  
excluding day  
visitors*

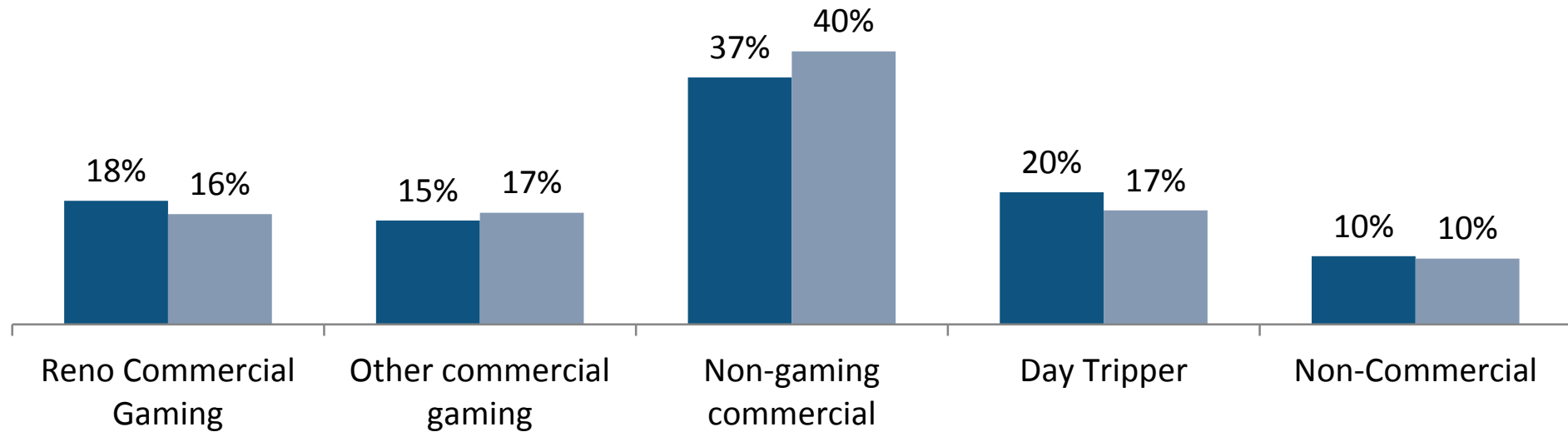


Q26. Thinking about your typical 24-hour day in the Reno area, on average, about how much money did you spend per person, per day for each of the categories below?

# Millennial Visitor Accommodations

*Millennials and other visitors share lodging practices.*

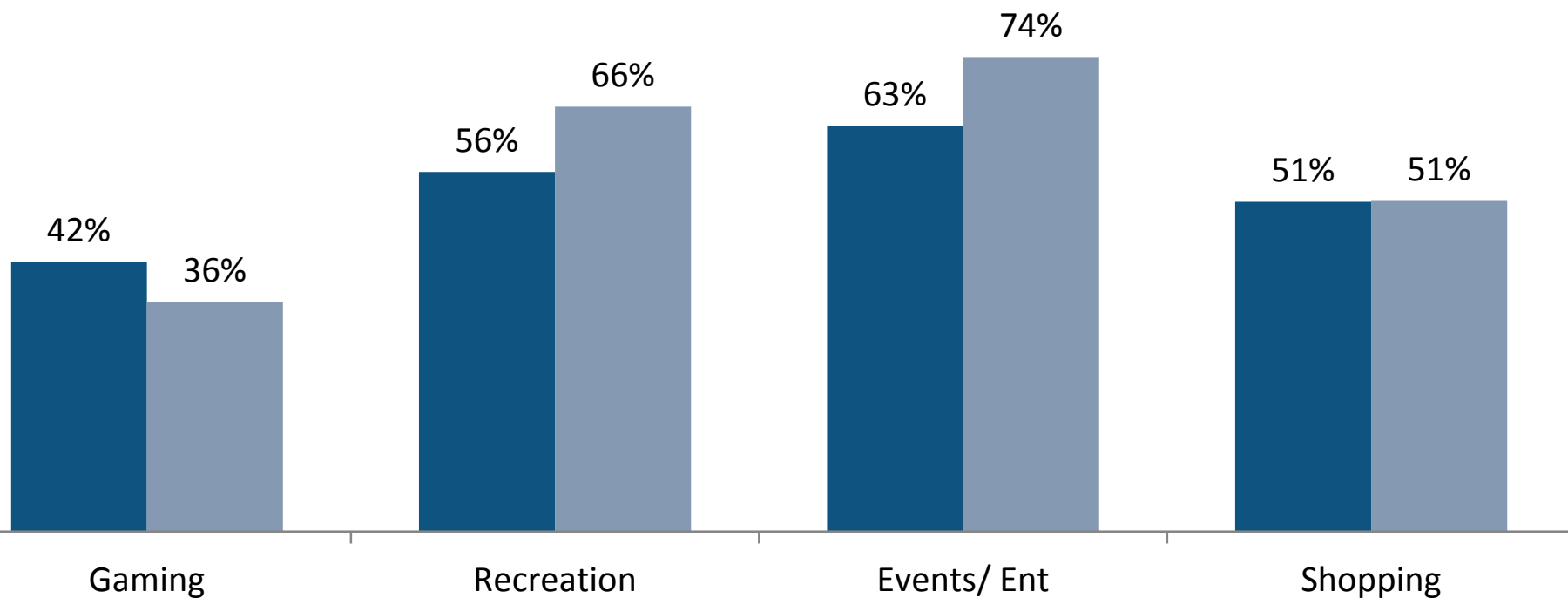
■ All Visitors    ■ Millennials (33%)



# Millennial Visitor Activities

*Millennials report participating more in recreational activities and events or entertainment, and less in gaming activities.*

■ All Visitors ■ Millennials (33%)



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- 9) **Focus on Infrequent Visitors**

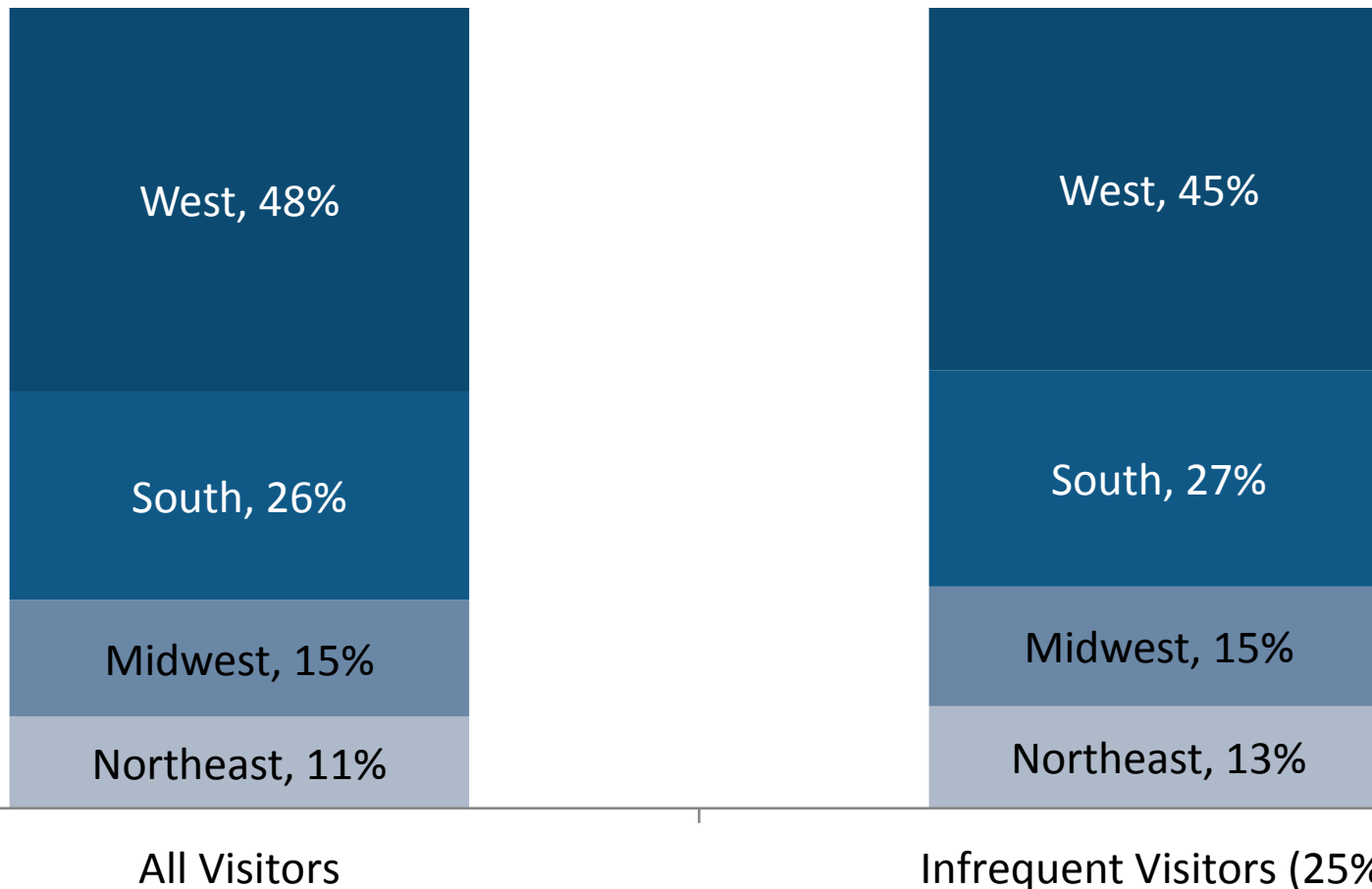
# Focus on Infrequent Visitors

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- ▶ Infrequent visitors, or those who have only spent one or less nights in the past two years, make up 25% of 2015 visitors to Reno.
- ▶ Fewer infrequent visitors come from Western states than come from other areas.
- ▶ A little more than half of infrequent visitors believe they will return to Reno in the next two years.
- ▶ Infrequent visitors report spending less in most categories.

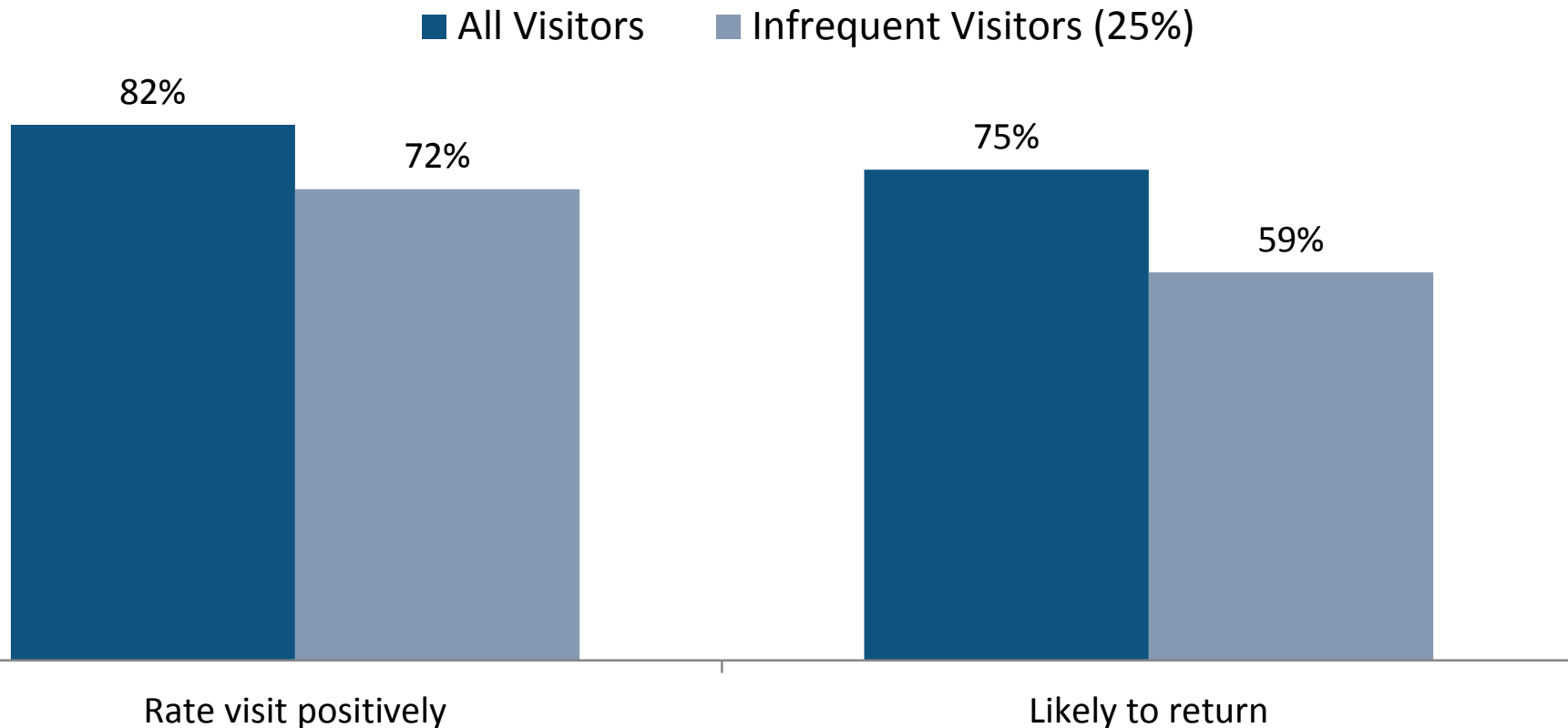
# Infrequent Visitors: Origin State

*Infrequent visitors are more likely to come from outside of the West.*



# Infrequent Visitors: Visit Satisfaction

*While infrequent visitors are highly satisfied with their visit, only a little more than half believe they will return in the next two years.*





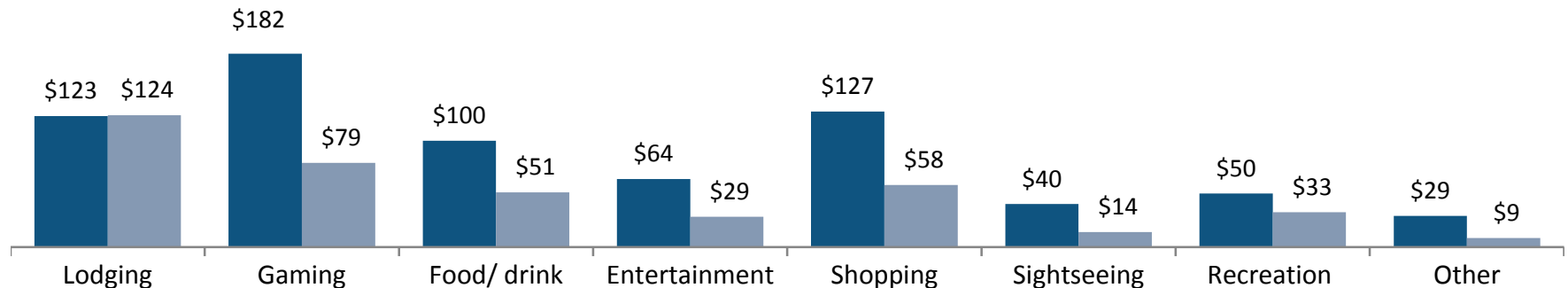
# Spend Among Infrequent Visitors

*While infrequent visitors report about the same lodging spend as other visitors, they spend less in all other categories.*

***On average, how much money did you spend per person, per day for each of the categories below?***

■ All Visitors      ■ Infrequent Visitors (25%)

*Self-reported  
nightly room  
rate  
excluding day  
visitors*

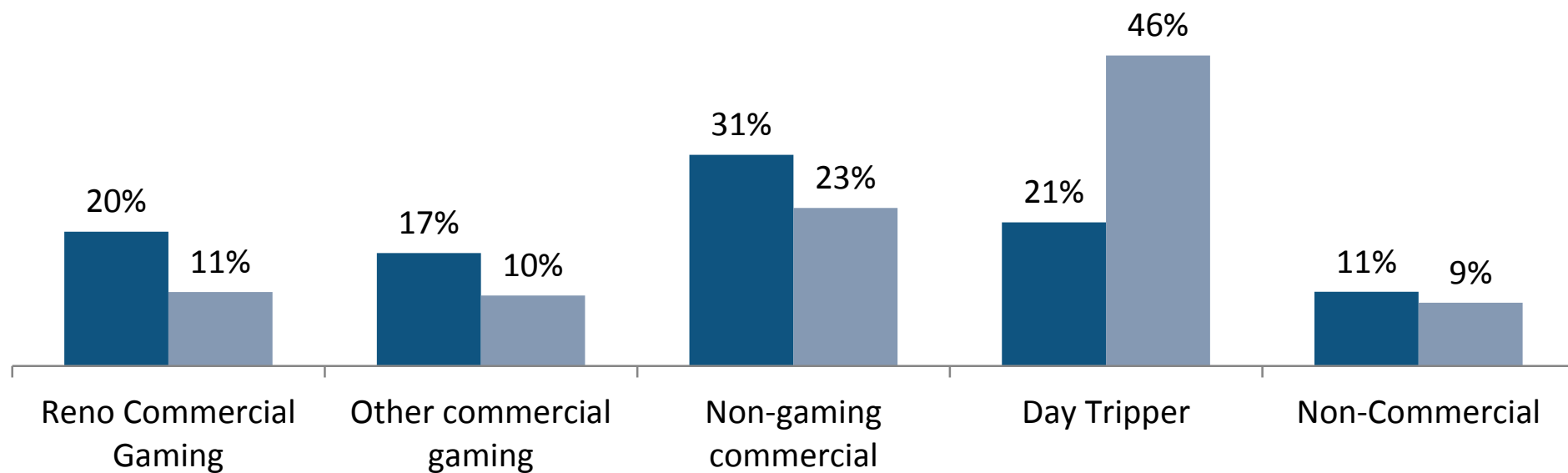


Q26. Thinking about your typical 24-hour day in the Reno area, on average, about how much money did you spend per person, per day for each of the categories below?

# Infrequent Visitor Accommodations

*Those who visit less frequently are more likely to be day trippers.*

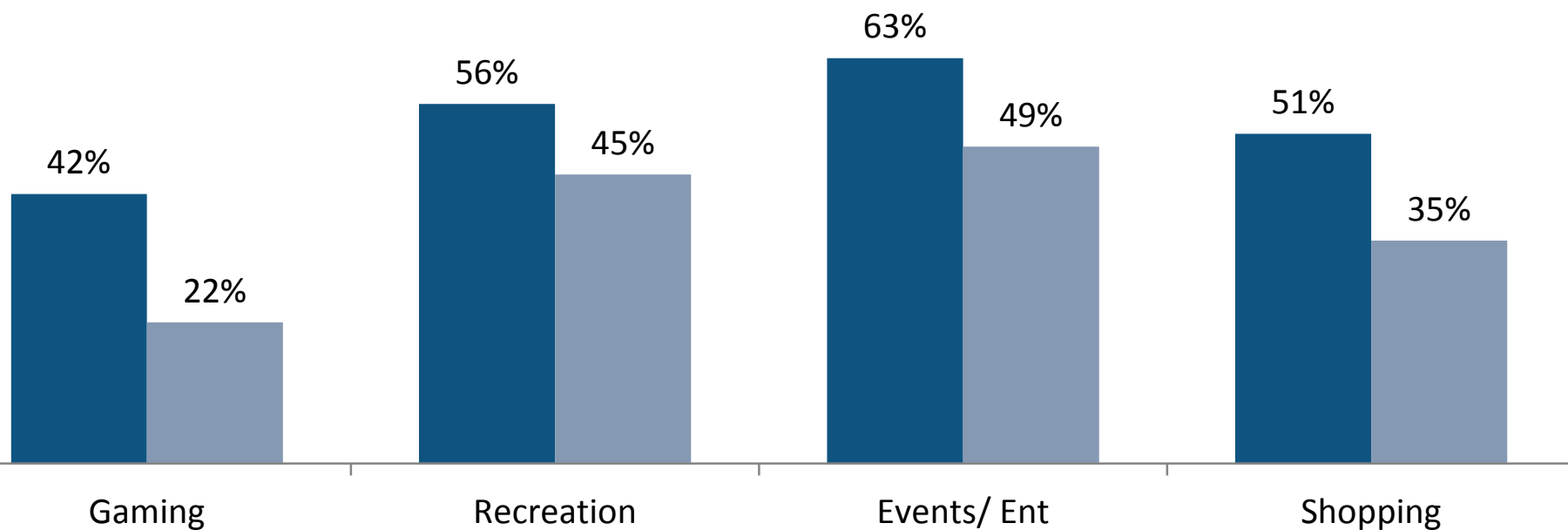
■ All Visitors    ■ Infrequent Visitors (25%)



# Infrequent Visitor Activities

*Infrequent visitors report less participation in all activities compared to visitors overall.*

■ All Visitors    ■ Infrequent Visitors (25%)



# Contacts

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# Appendix

# 2015 – Activity Question Changes

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## 2013

Did you attend or participate in any of the following activities during your most recent trip to the Reno area?  
(Check the box next to each activity you participated in.)

(CHECKBOXES)  
(RANDOMIZE)

1. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
2. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
3. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
4. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
5. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
6. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
7. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
8. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
9. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
10. (INSERT EVENT / ACTIVITIY / ATTRACTION; CHANGE MONTHLY)
11. See other live entertainment (Please Specify)
12. None of the above

*In 2015, questionnaire changes included creating broader categories for events, entertainment, and live sports. By creating broader categories, data can be managed and tracked more efficiently.*

## 2015

Did you attend or participate in any of the following Activities during your most recent trip to the Reno area?  
(Check the box next to each activity you participated in.)

(CHECKBOXES)  
(RANDOMIZE 1-4, RANDOMIZE 6-16)

1. University of Nevada-Reno live sporting event
2. Reno Aces Baseball Game (**DISPLAY DURING SEASON**)
3. (INSERT SPORTING EVENT; CHANGE MONTHLY)
4. (INSERT SPORTING EVENT; CHANGE MONTHLY)
5. Other live sporting event
6. USBC Tournament (**DISPLAY DURING TOURNAMENTS**)
7. Amateur sports tournament
8. Reno Beer Crawl
9. Downtown Reno Wine Walk
10. Live concert
11. Live comedy show
12. Live magic show
13. Live play or musical
14. Nightclub
15. (INSERT EVENT/ACTIVITY/ATTRACTION; CHANGE MONTHLY)
16. (INSERT EVENT/ACTIVITY/ATTRACTION; CHANGE MONTHLY)
17. Other live entertainment at a casino
18. Other live entertainment (please specify)
19. None of the above