

2013 Visitor Profile Survey Final Year End Executive Summary

Prepared for
RSCVA Board Meeting
March 27, 2014



Contents

1. Background and Key Findings
2. Hearing About the Reno Area
3. Who Visited & How They Came
4. What Visitors Do
5. Returning to the Reno Area
6. Conclusions

Research Goals

- ▶ Survey a representative sample of all 2013 visitors to Washoe County in order to better understand the visitor population
- ▶ Understand visitor travel behaviors, activity participation, spending, visit satisfaction and visitor demographics
- ▶ Track against previous studies to assess changes in visitor experience
- ▶ Identify target areas for increasing visits and spending

Methodology

- ▶ Internet panel survey of Washoe County visitors age 21 and older
- ▶ Conducted early in each month capturing visitors from the prior month, February 2013 to January 2014
- ▶ Respondents reached using a nationally representative web panel screened for Washoe County visitors
- ▶ 3600 respondents screened to participate each month (2000 in Western oversample and 1600 national)
- ▶ Screener population was weighted using geography, age, and gender to achieve a representative national sample
- ▶ 2000 completed surveys for the year
 - ▶ Margin of Error: ± 2.2 percentage points
- ▶ Where applicable, results are compared to the 2011 RSCVA Visitor Profile Survey
 - ▶ $n=2,797$; MoE ± 1.9 percentage points

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

High Level Findings

- ▶ Reno visitors are a diverse group dominated by visitors from Western states.
- ▶ Reno visitors are loyal – most are repeat visitors, most give positive ratings of their visit, and most intend to return.
- ▶ Reno’s traditional visitor base of gamers remains important: this somewhat older and Western state-dominated group spends more money and returns more often.
- ▶ Reno continues to see growth in a slightly younger, more national visitor group which includes more families and visits primarily for non-gaming fun.

Other Key Trends and Tracking

- ▶ The 2013 visitor profile is largely consistent with the 2011 profile on most broad measures, including visitor demographics, visit satisfaction, and intent to return.
- ▶ Compared to the 2011 Visitor Profile Survey, 2013 visitors stayed longer, traveled in larger groups, and spent more money.
- ▶ Among California visitors, visitation from LA is now equal to visitation from the Bay Area.

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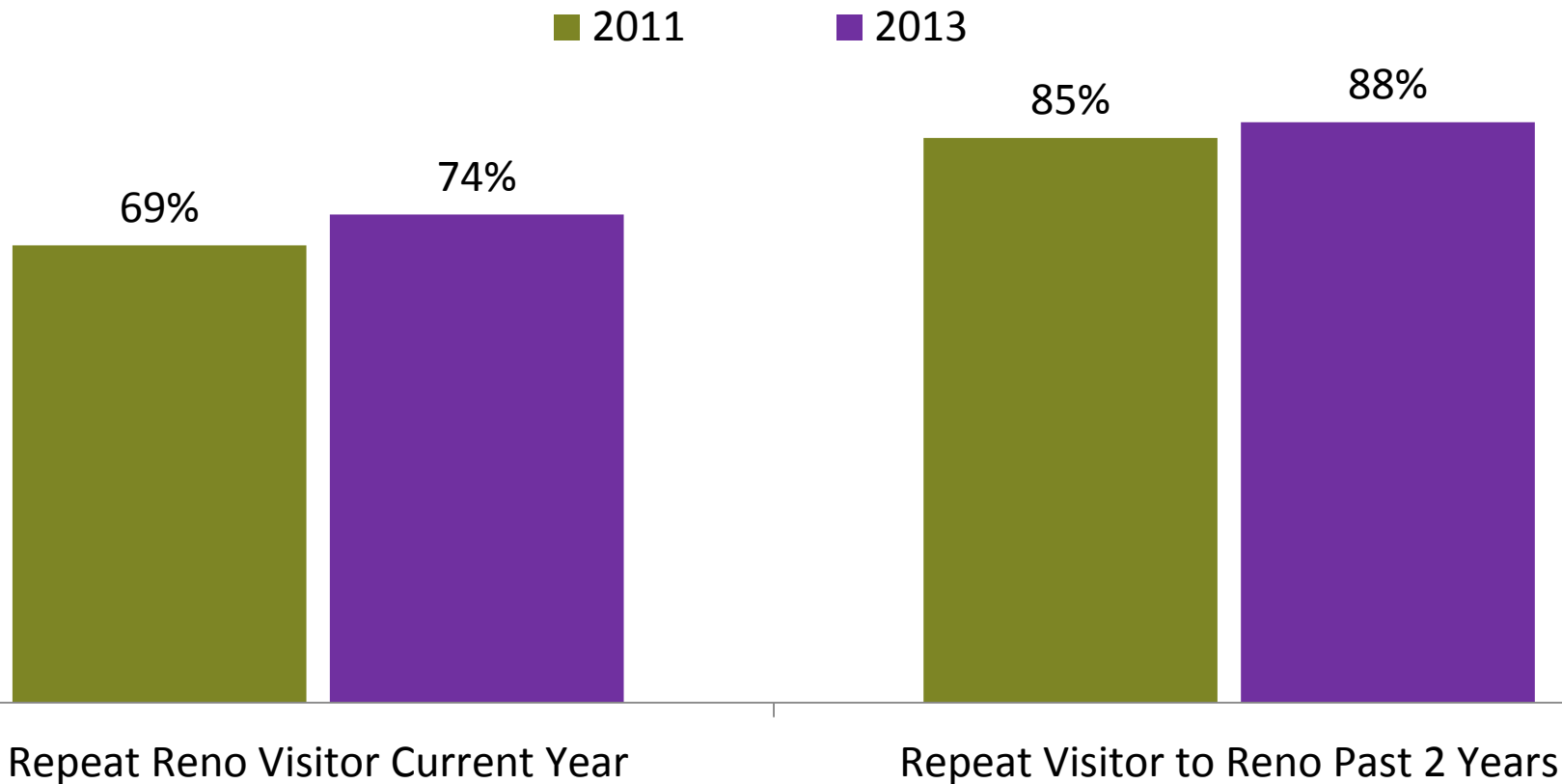
1. Background and Key Findings
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Prior Visits to Reno

Most Reno visitors say they have visited before.

Before this visit, approximately how many times had you been to the Reno area in 2013, prior to the month of visit?

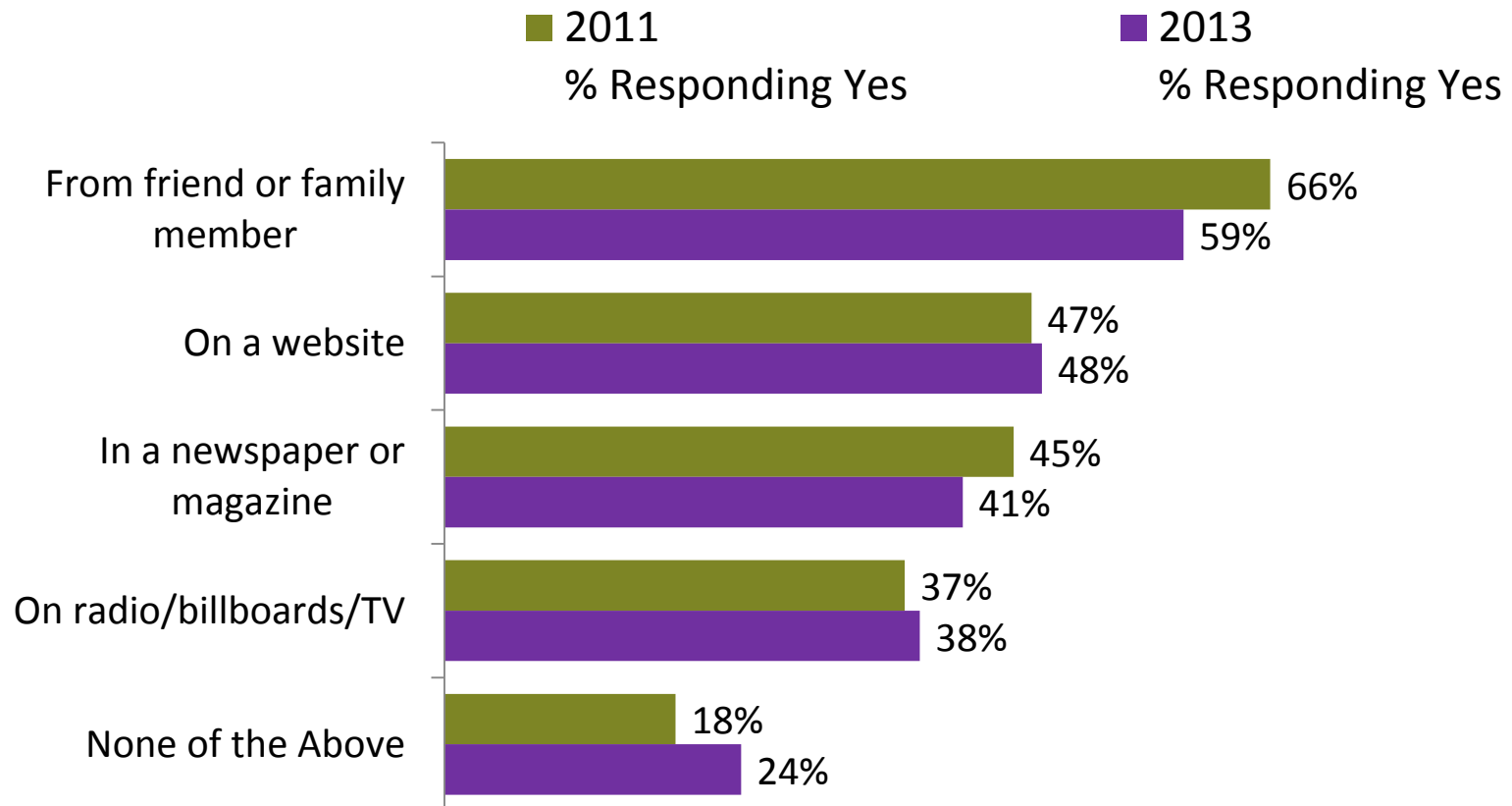
In the past two years, how many nights would you say you have spent in the Reno area?



Reno Media and Awareness

Media awareness of the destination is essentially unchanged for 2011, and word of mouth remains the top source of information.

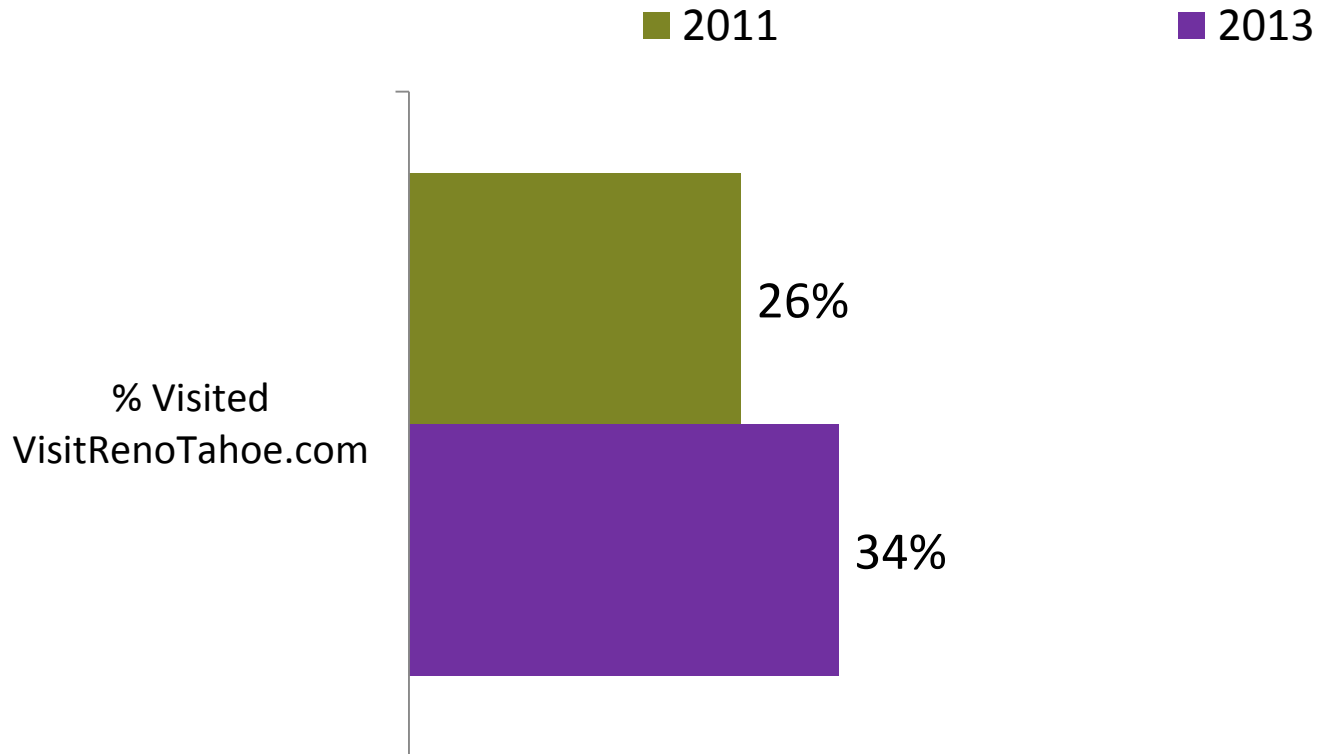
Prior to your most recent visit, had you seen or heard anything about the Reno area...



VisitRenoTahoe.com

More report visiting Reno-Tahoe's website.

Have you ever visited Reno-Tahoe's website, www.VisitRenoTahoe.com?



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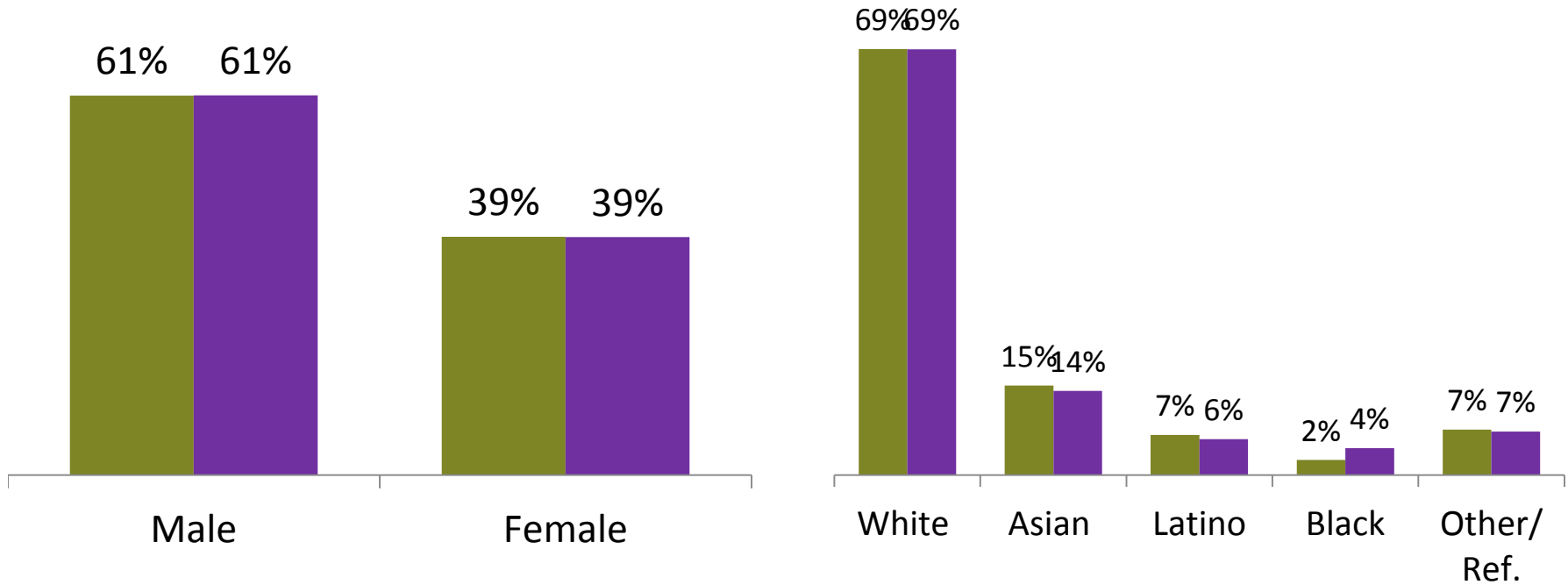
Visitor Demographics: Gender, Race

Gender and race have remained consistent with 2011 survey results.

■ 2011 ■ 2013

Income

Race



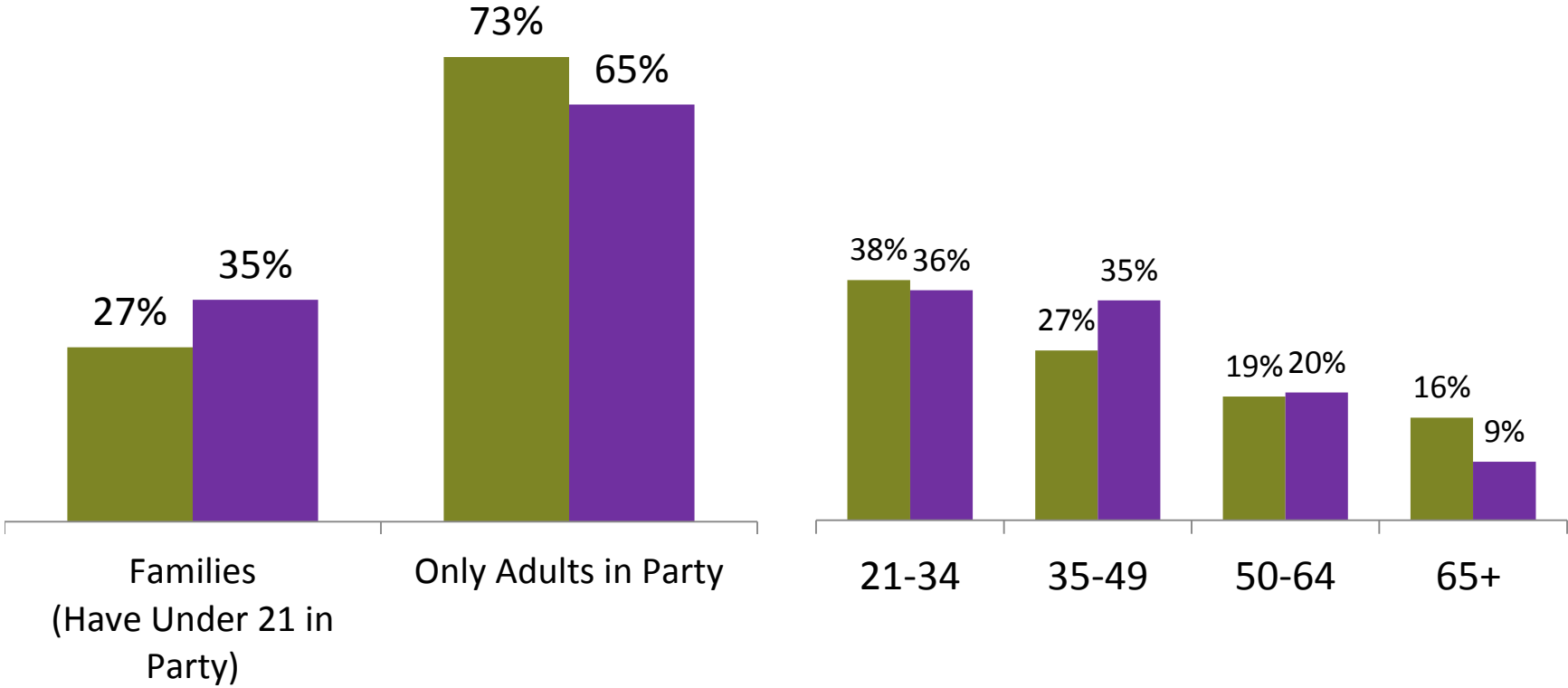
Visitor Demographics: Party Type, Age

2013 saw an increase in visitors with kids. While visitors' average age has not changed significantly since 2011, there has been an increase in the age 35-49 demographic.

■ 2011 ■ 2013

Party Type

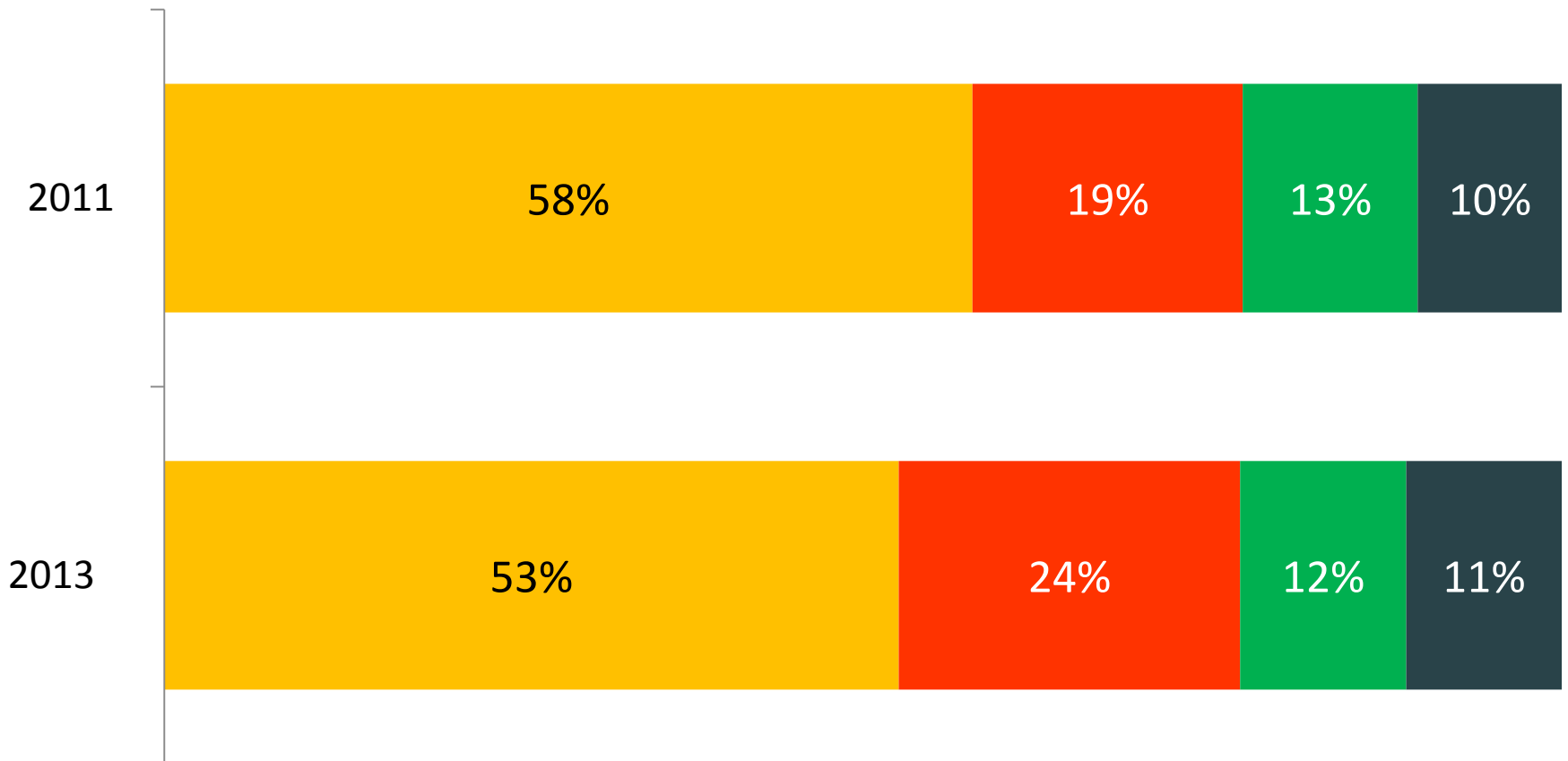
Age



Visitors by Region

Most visitors continue to be from the West. Slightly more visitors were from the South in 2013.

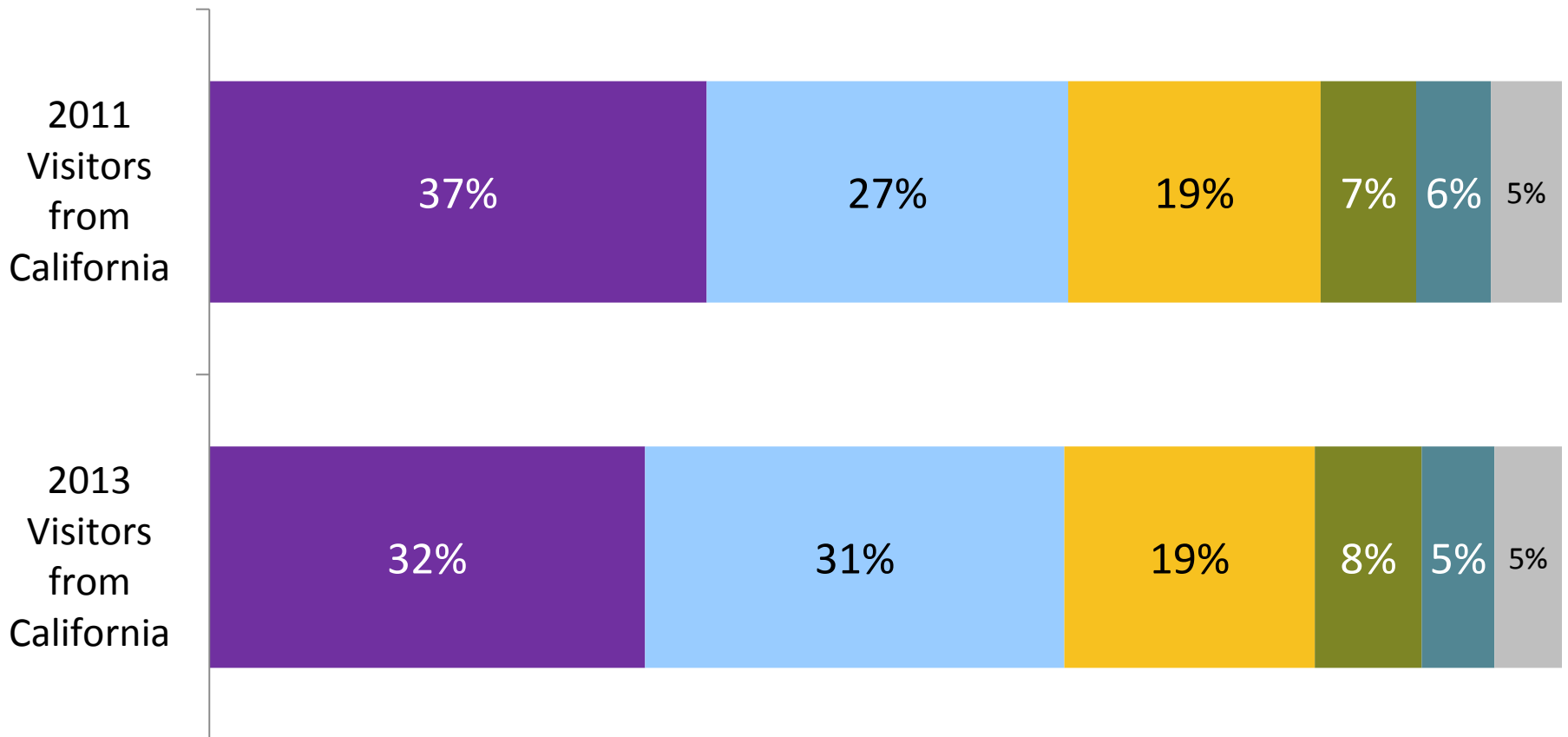
■ West ■ South ■ Midwest ■ Northeast



California Visitors

Visitation from the LA area is now equal to visitation from the Bay Area.

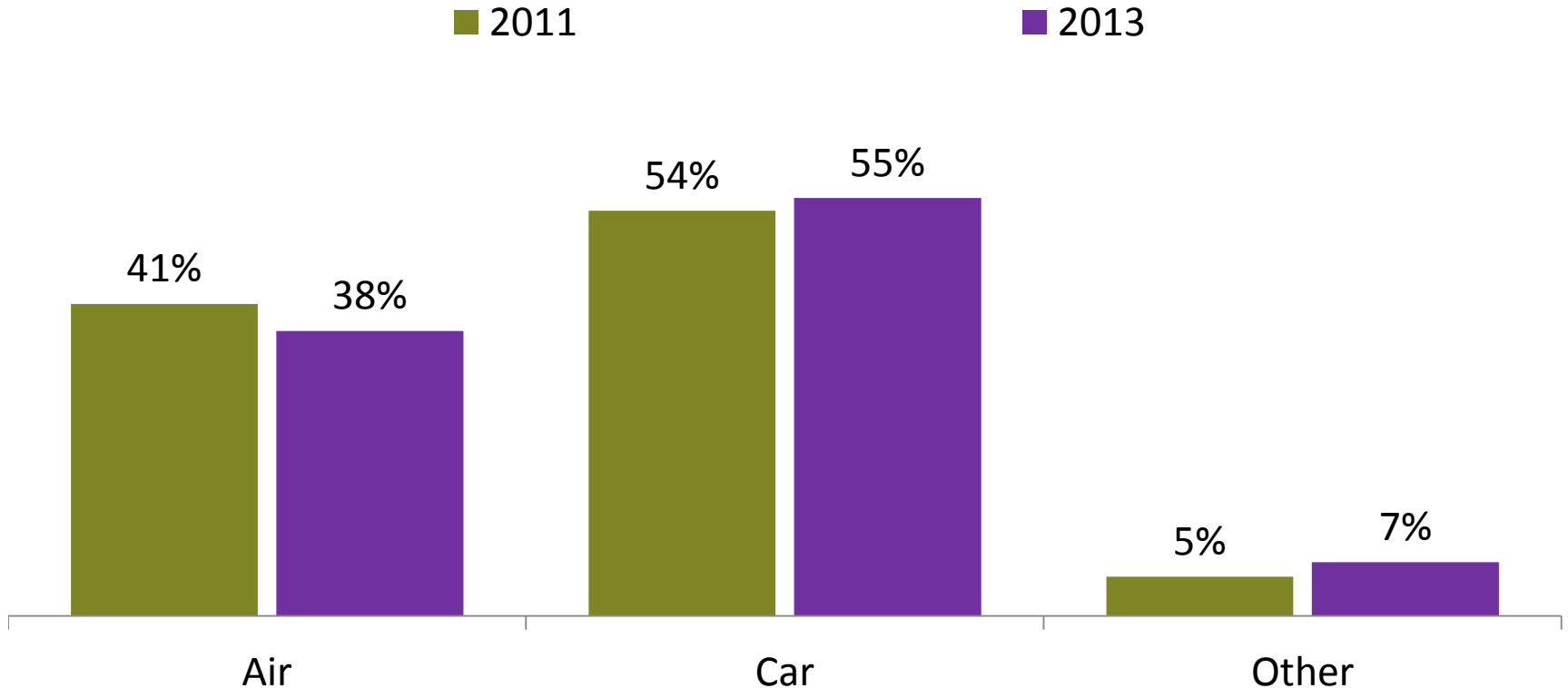
■ SF Bay Area ■ LA ■ Sacramento area ■ Central Valley ■ San Diego ■ Other



Travel Mode

Over half of visitors continue to travel to Reno by car.

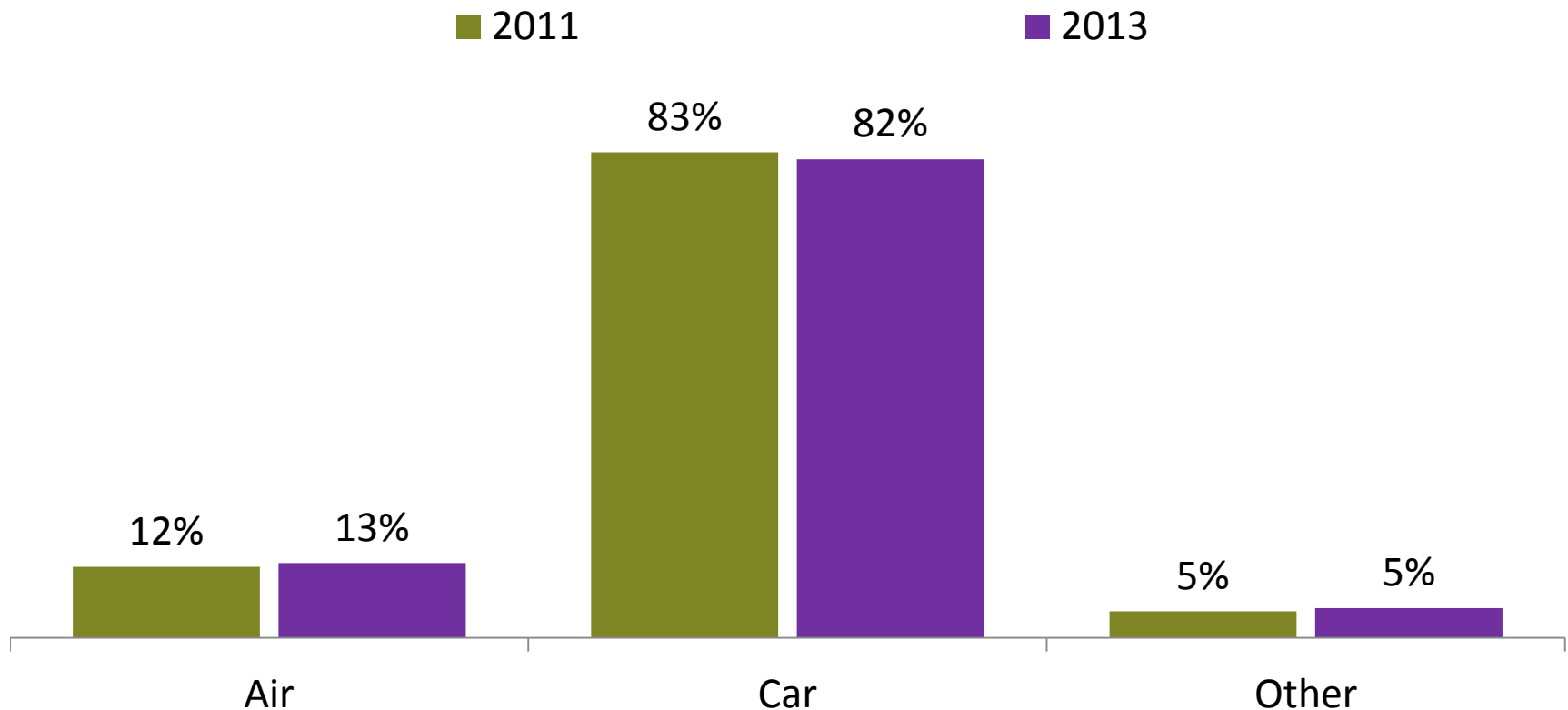
Primary Method of Travel



Detail: Travel Mode Among California Visitors

Most visitors from California continue to drive to Reno.

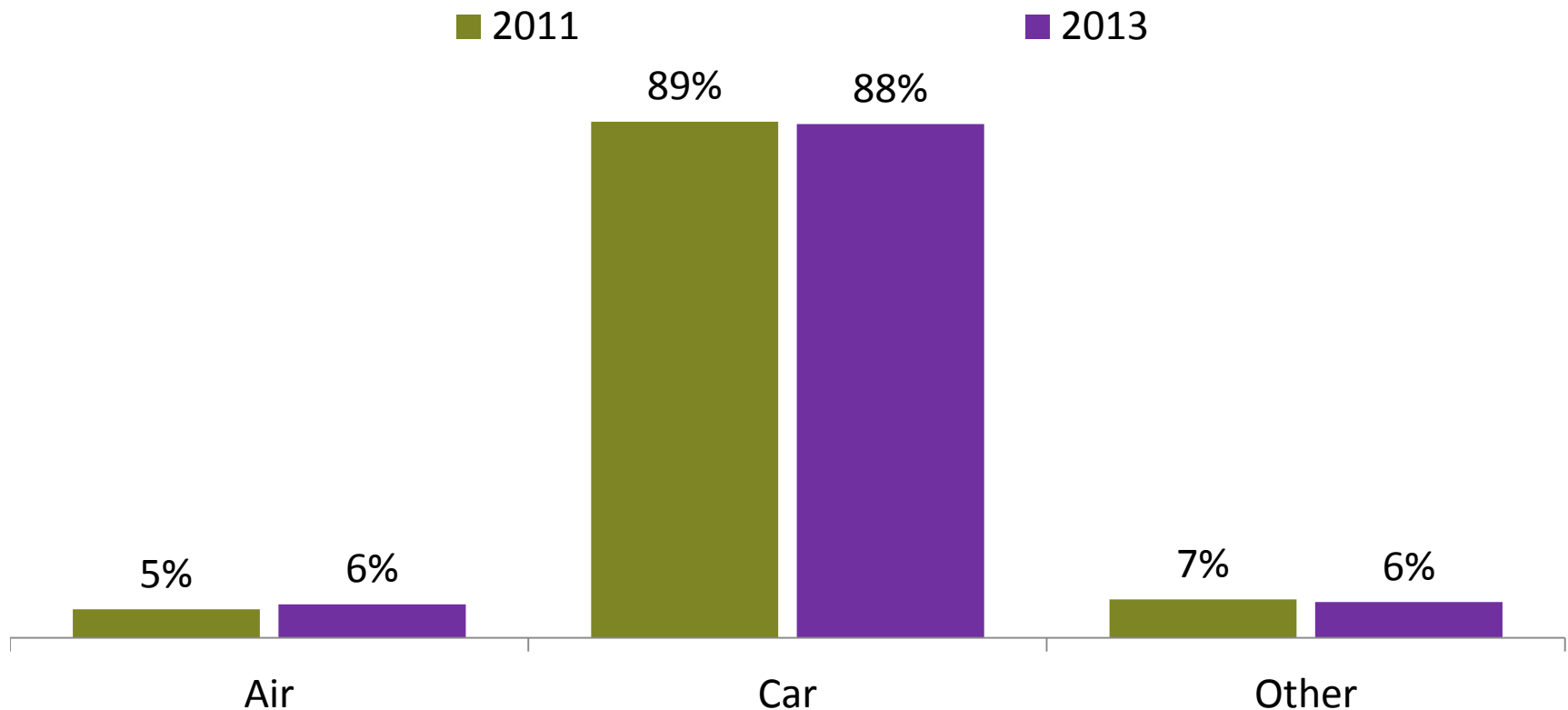
Primary Method of Travel



Detail: Travel Mode Among San Francisco Bay Area Visitors

Travel mode has not changed significantly among San Francisco Bay Area visitors.

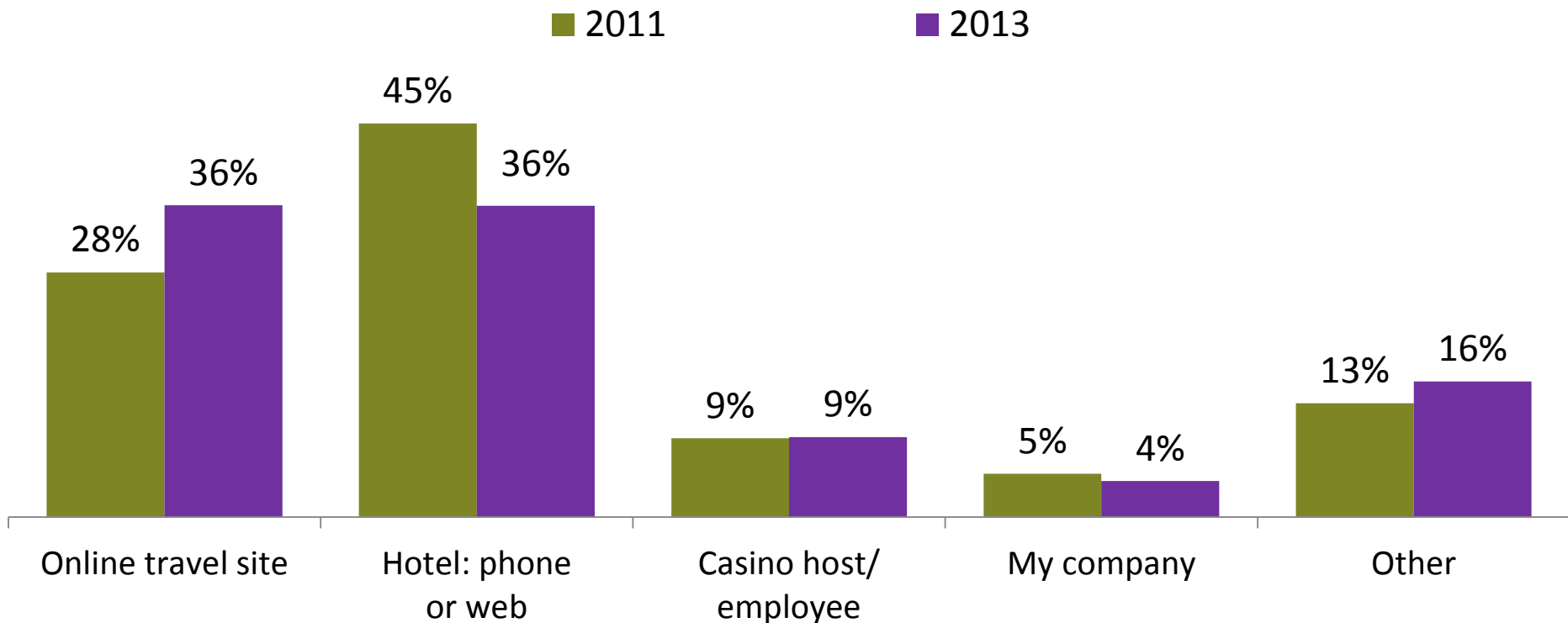
Primary Method of Travel



Lodging Reservations

Bookings through online travel sites are growing and now equal those made directly with hotels.

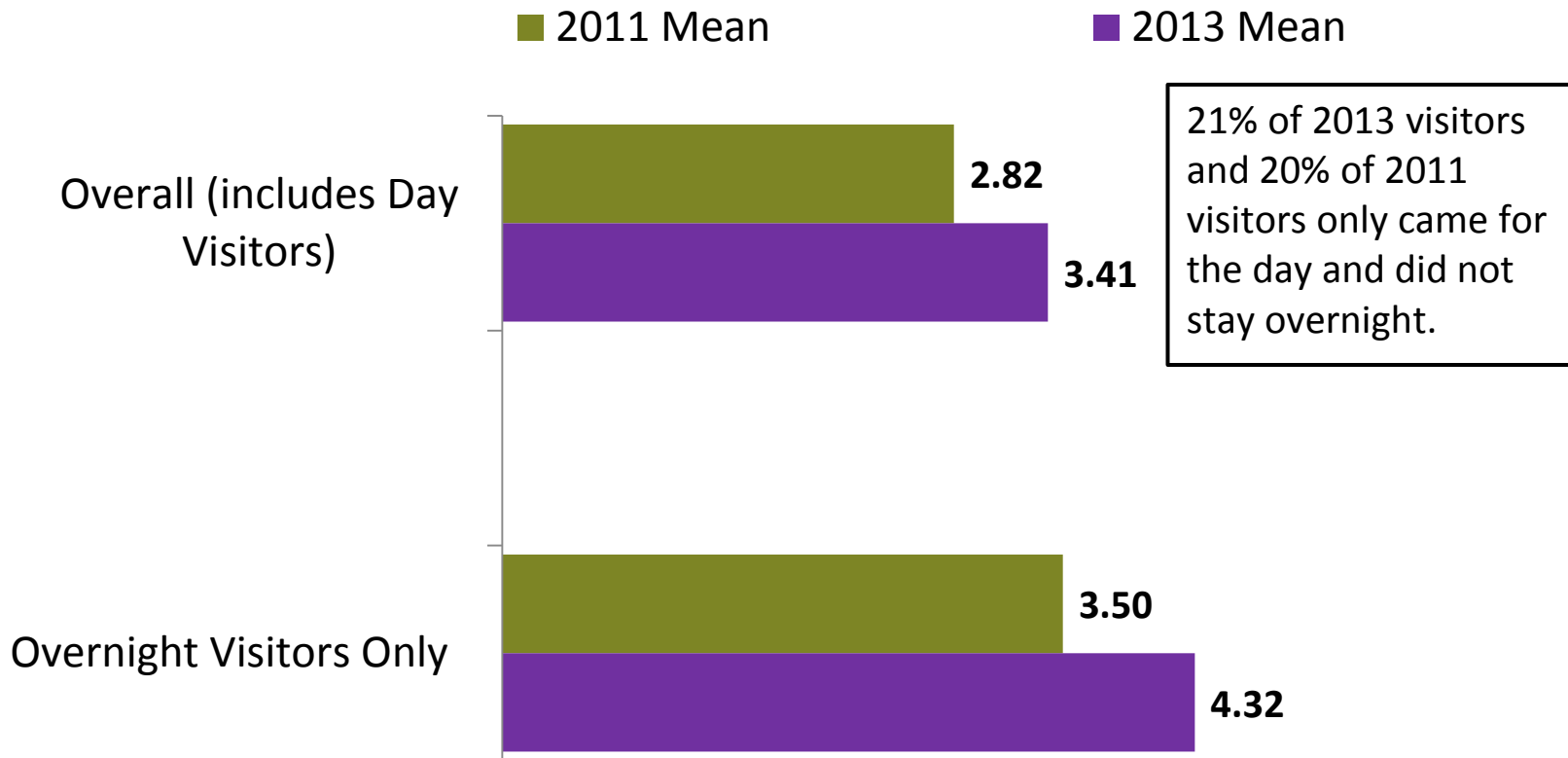
How did you make your lodging or hotel reservations?



Length of Stay

Most visitors continue to stay overnight. Average visit length has increased since 2011.

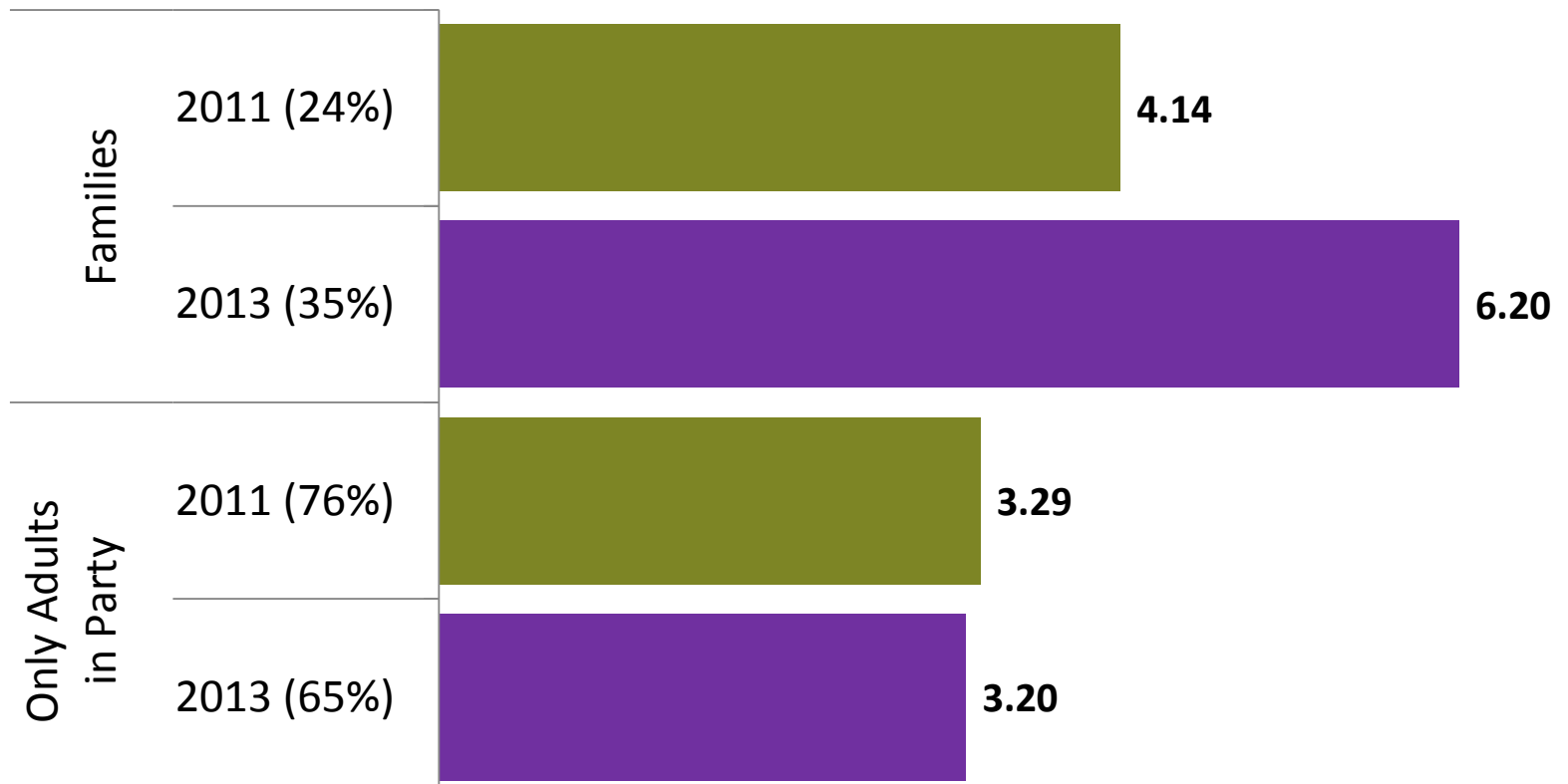
Average Length of Stay in Nights



Length of Stay by Party Type

Average visit length increased among overnight visitors with someone under 21 in their party, but is unchanged among adult-only.

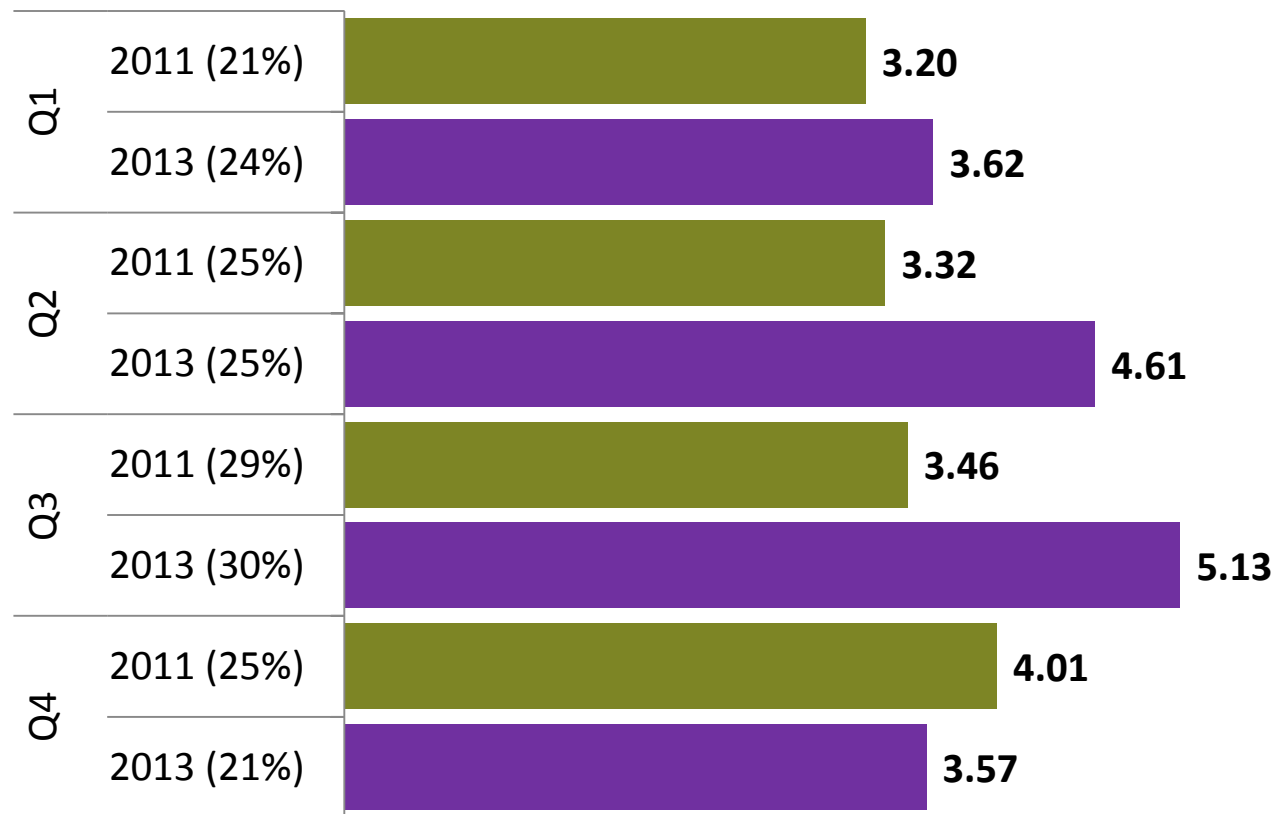
Average Length of Stay in Nights (Overnight Only)



Length of Stay by Quarter

Average visit length is longest in the summer.

Average Length of Stay in Nights (Overnight Only)



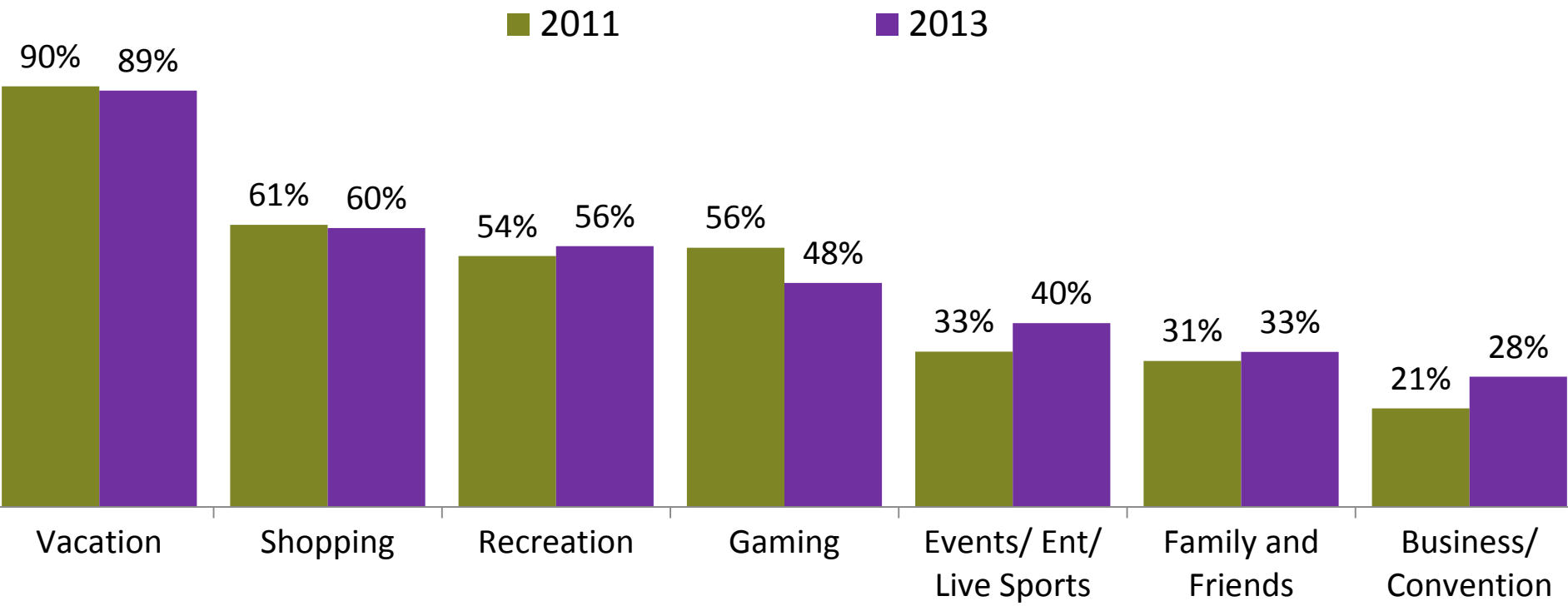
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Self-Reported Participation in All Activities During Trip

Visitors reported attending events and participating in business/convention slightly more in 2013, while self-reported gaming decreased slightly.

Groupings were created by combining responses from self-reported individual activities.



Activity Detail (recurring each month)

Gaming and resting and relaxing decreased slightly compared to 2011, but are still top activities along with shopping. More report going to the National Auto Museum.

Visitor activities: *Did you participate in any of the following activities during your most recent trip to the Reno area? (Percentage indicates how many participated in that activity. Respondents could select multiple activities.)*

Activity	2011 % participating	2013 % participating
Rest & relax	62%	53%
Sightseeing in Reno	53%	51%
Gamble	56%	48%
Shop	49%	46%
Shop at Legends/ Scheels/ Meadowood/ Summit	42%	42%
Visit Lake Tahoe	41%	37%
Visit friends or relatives	28%	28%
Hike/ Bike	23%	25%
Visit Carson City	18%	22%
National Auto Museum	14%	21%

Activity Detail (recurring each month), cont.

There is a small increase in bowlers compared with 2011.

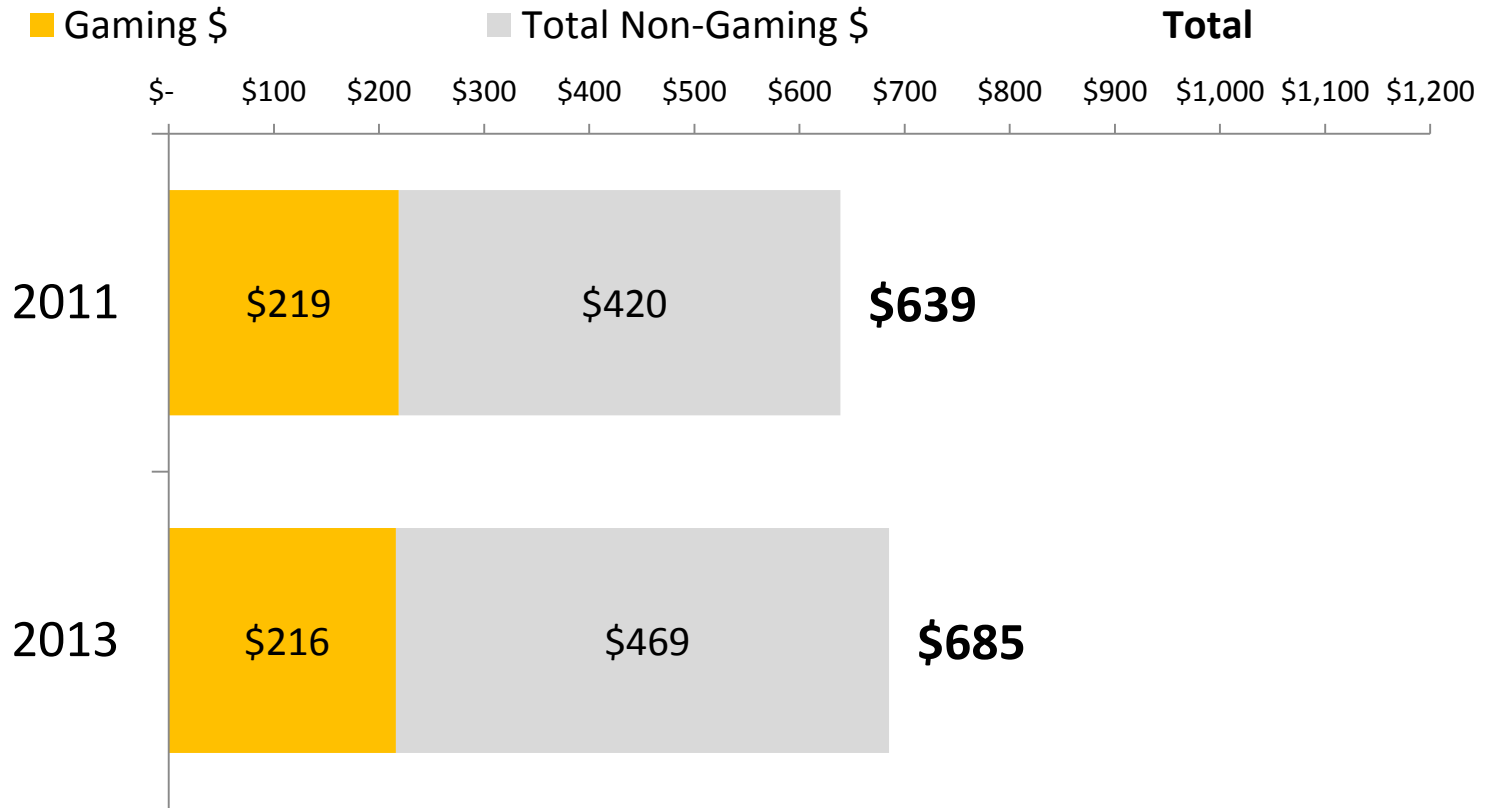
Visitor activities: *Did you participate in any of the following activities during your most recent trip to the Reno area? (Percentage indicates how many participated in that activity. Respondents could select multiple activities.)*

Activity	2011 % participating	2013 % participating
Bowl	12%	18%
Go to a spa	16%	18%
NV Museum of Art	14%	18%
Visit Sparks	13%	18%
Other Sightseeing	21%	17%
Conduct business	13%	17%
Raft/ swim/ kayak	15%	16%
Snow ski/ snowboard/ snowshoe	12%	15%
Golf	15%	15%
Visit Truckee	13%	15%
Visit Virginia City	12%	15%
Convention/trade show/ seminar/reunion	11%	13%
Other Recreation	11%	12%
Wedding/honeymoon/ friend or family event	8%	11%

Total Self-Reported Spending

Total self-reported spending increased slightly compared to 2011, especially in non-gaming categories.

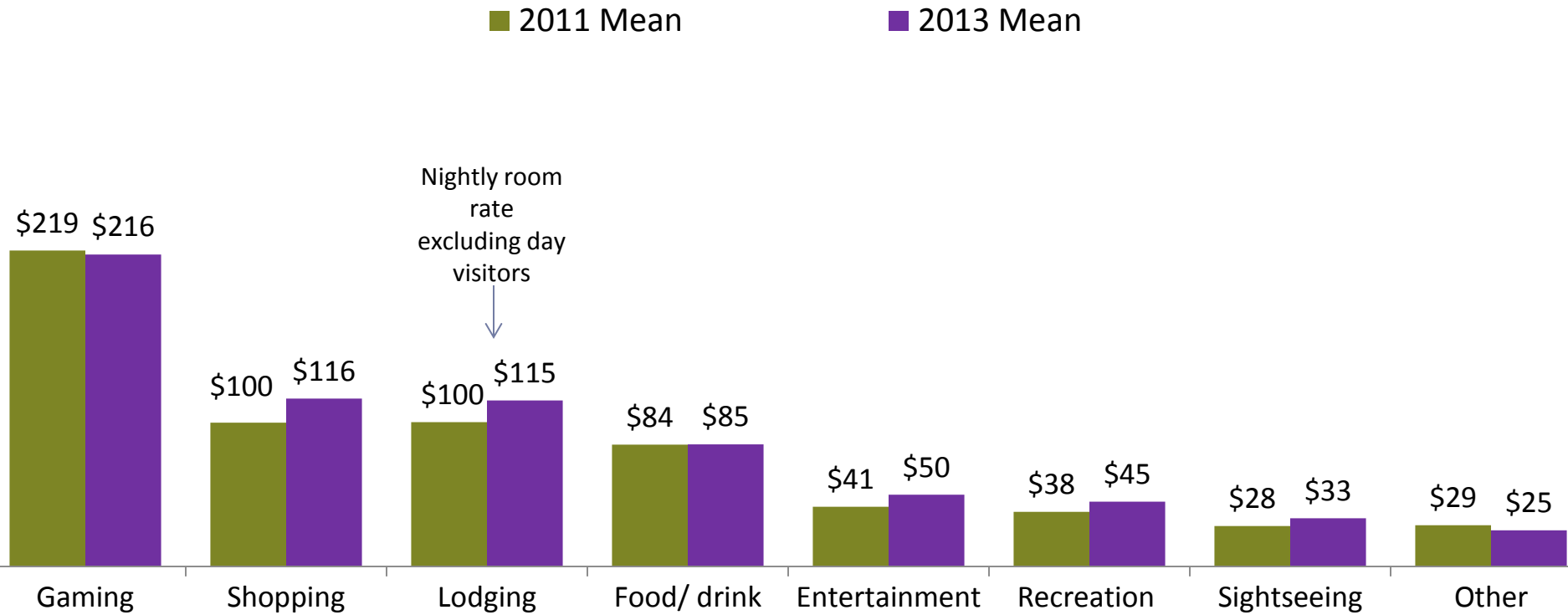
Spending: On average, how much money did you spend per person, per day for each of the categories below?
For hotel: How much did your accommodations cost per night? (excluding comped nights)



Self-Reported Spending by Category

Visitors continue to report spending the most on gaming. Average self-reported spending on lodging, shopping, entertainment and recreation increased slightly compared to 2011.

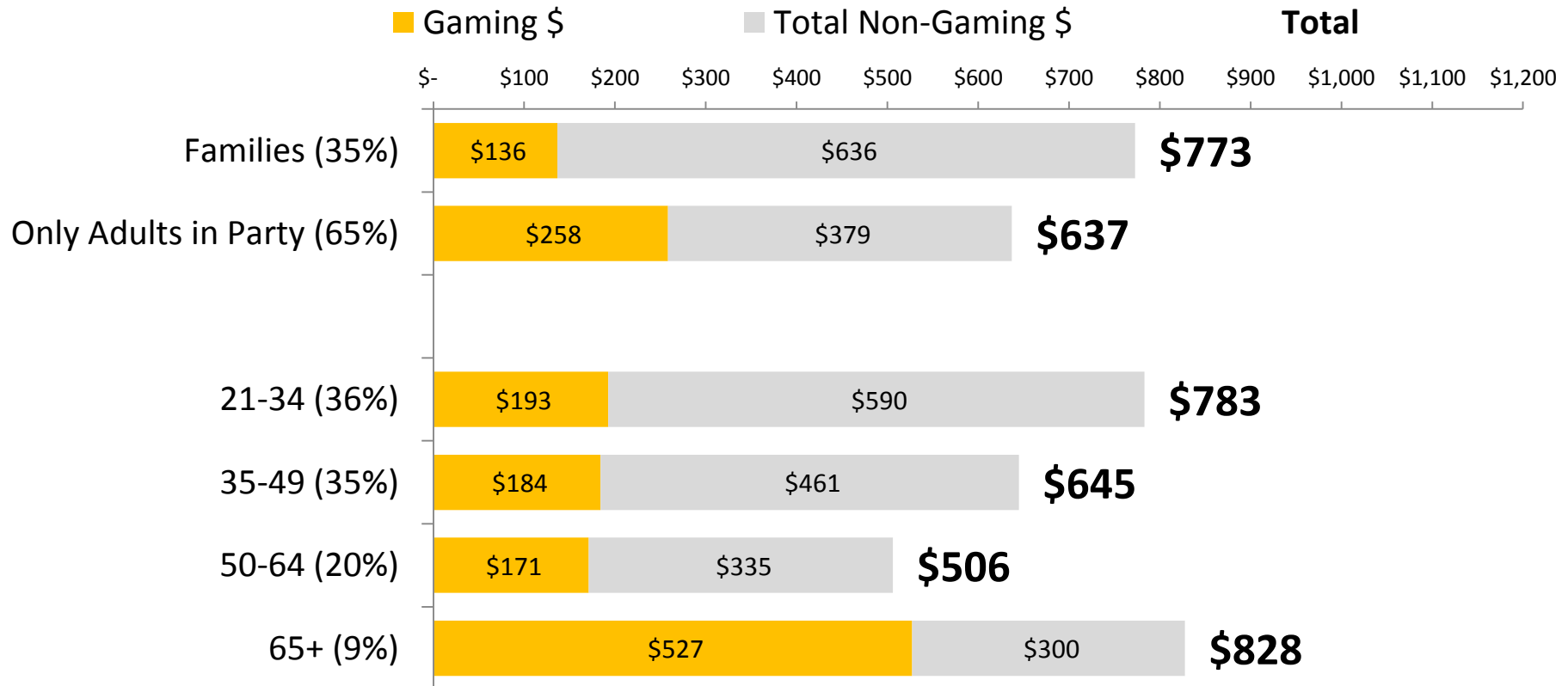
Spending: On average, how much money did you spend per person, per day for each of the categories below? (excludes outliers)
Lodging Spending: Cost of accommodations per night (excluding comped nights).



Total Self-Reported Spending by Party Type and Age

Visitors with someone under 21 in their party spent more overall. Gaming spending is significantly higher among older visitors.

Spending: On average, how much money did you spend per person, per day for each of the categories below?
For hotel: How much did your accommodations cost per night? (excluding comped nights)

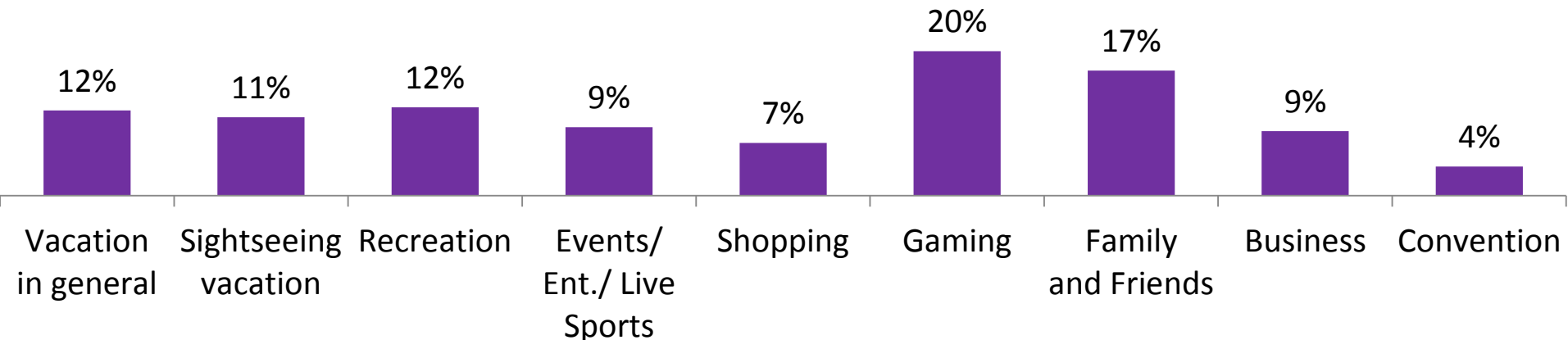


Visitor Types

Gaming and Family and Friends are the largest visitor types.

Respondents were placed into 9 profile groups by combining the primary purpose for their visit with activities and spending responses.

■ 2013 Overall

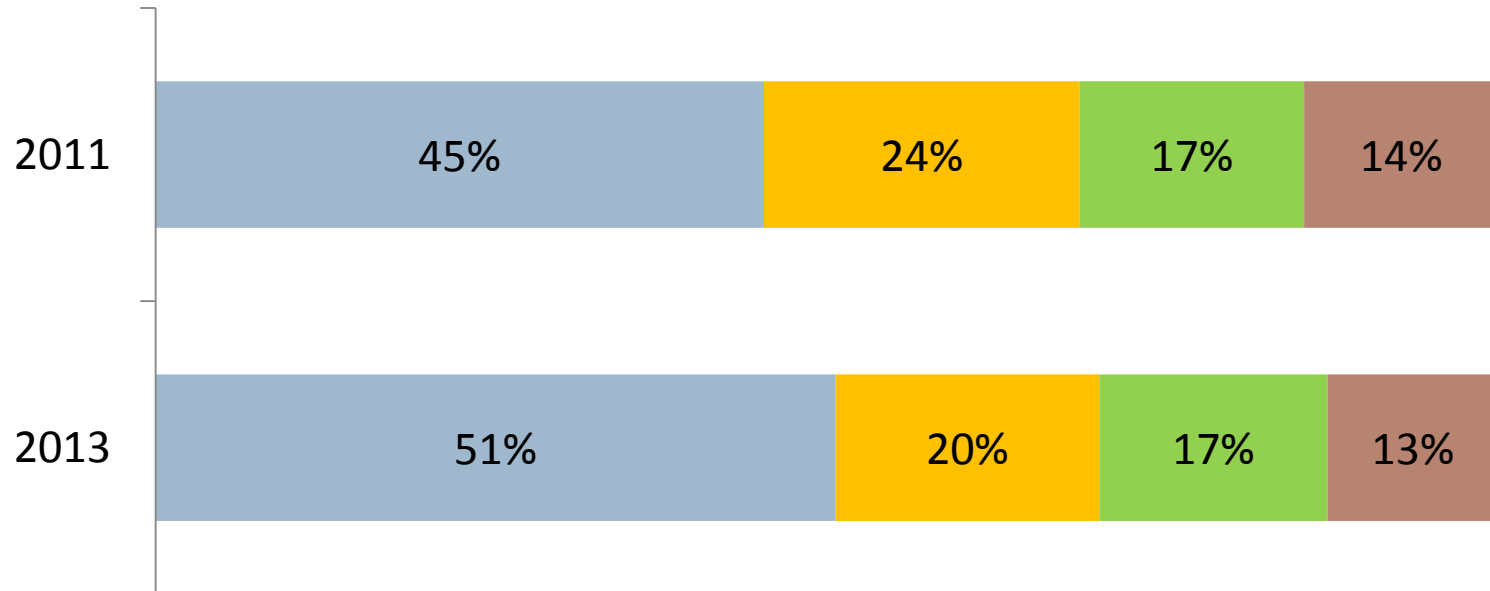


Collapsed Visitor Types

Over half visited Reno primarily for Fun , and the number of “Fun” visitors has increased compared to 2011.

The 9 profile groups were further collapsed into 4 categories.

■ Fun (Vacation/Recreation/ Entertainment/Shopping) ■ Gaming ■ Family and Friends ■ Job-Related (Business/Conventions)

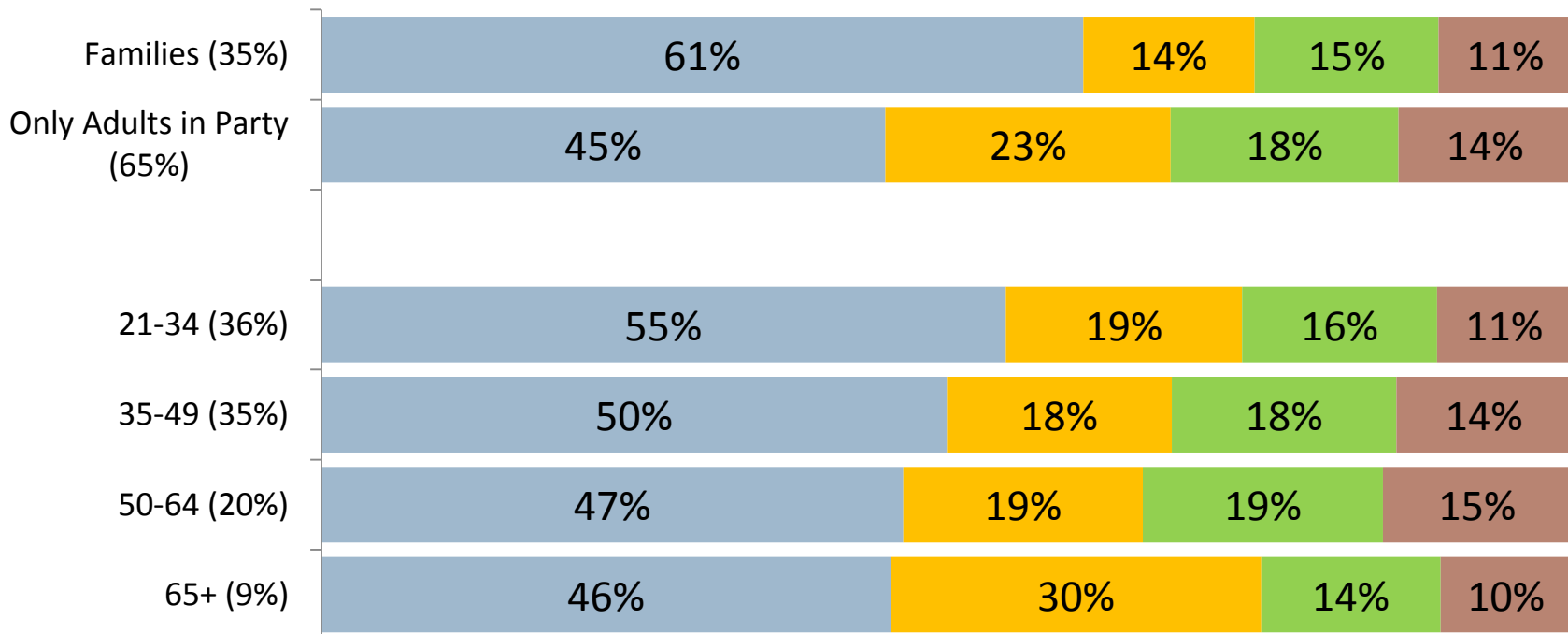


Visitor Types by Party Type & Age

61% of visitors with someone under 21 in their party were in the Fun visitor type. Younger visitors are more likely to be in the Fun visitor type.

The 9 profile groups were further collapsed into 4 categories.

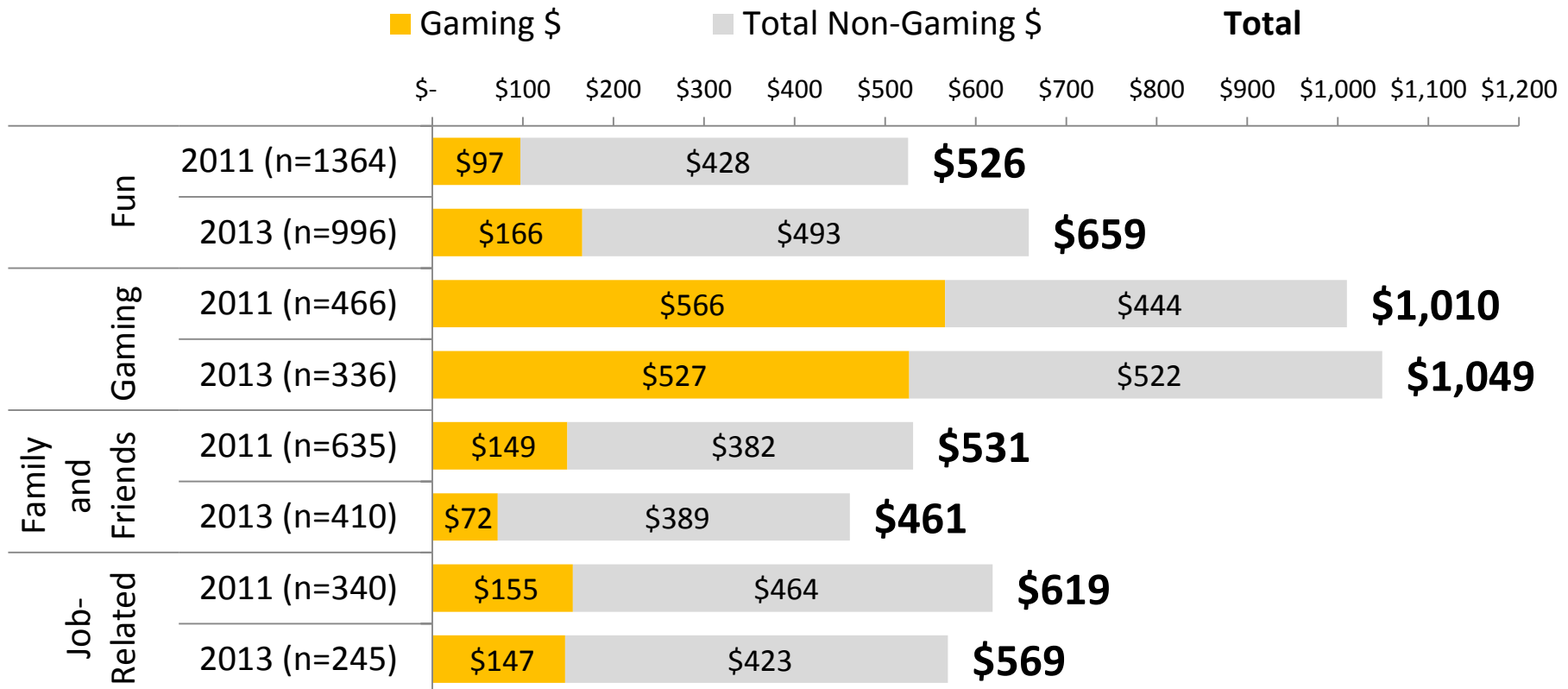
■ Fun (Vacation/Recreation/ Entertainment/Shopping) ■ Gaming ■ Family and Friends ■ Job-Related (Business/Conventions)



Total Self-Reported Spending by Visitor Type

Gamers continue to be the biggest overall spenders. There was a significant increase in self-reported spending among the “Fun” visitor type.

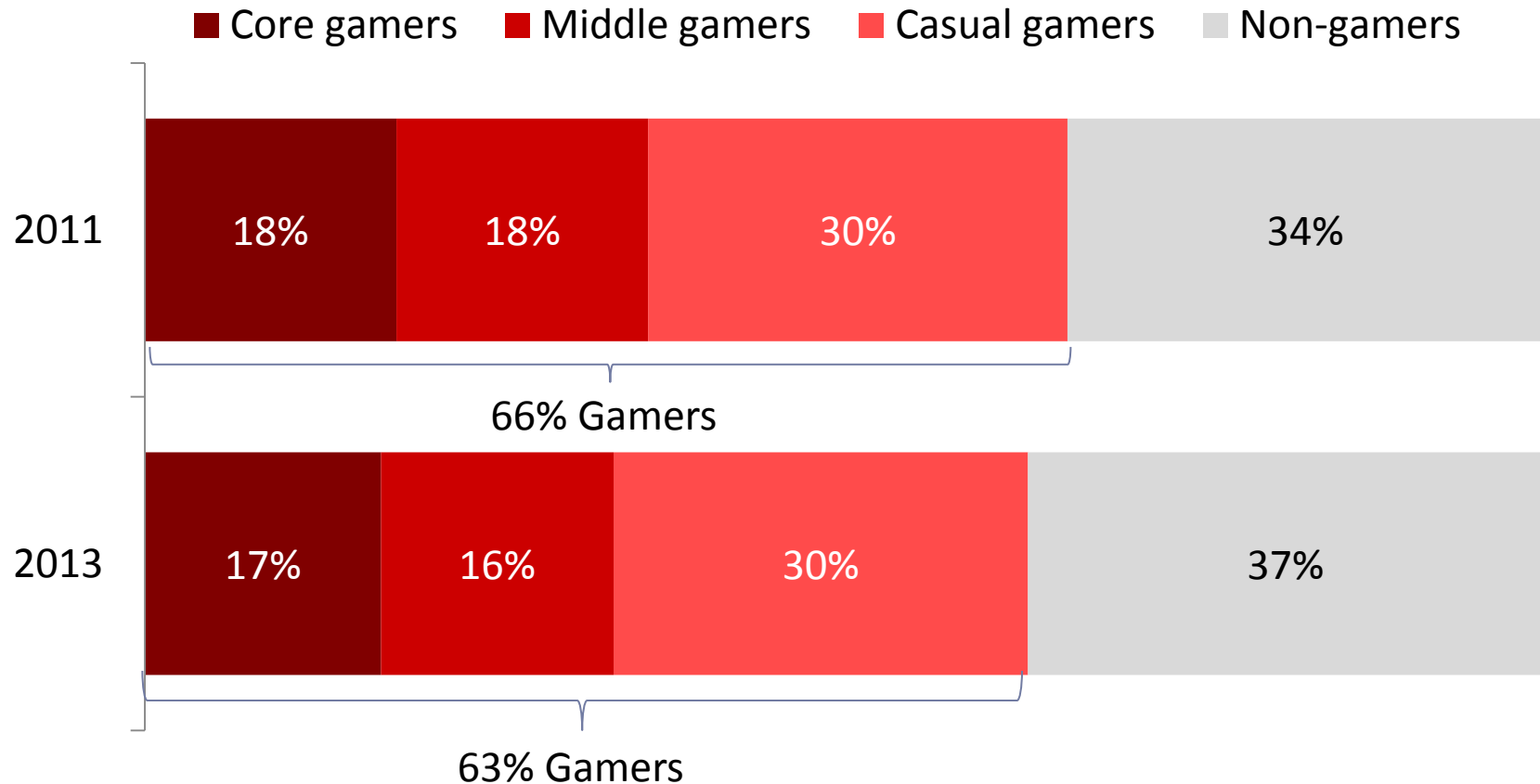
Spending: On average, how much money did you spend per person, per day for each of the categories below?
For hotel: How much did your accommodations cost per night? (excluding comped nights)



Gaming Segmentation

Most Reno visitors are gamers.

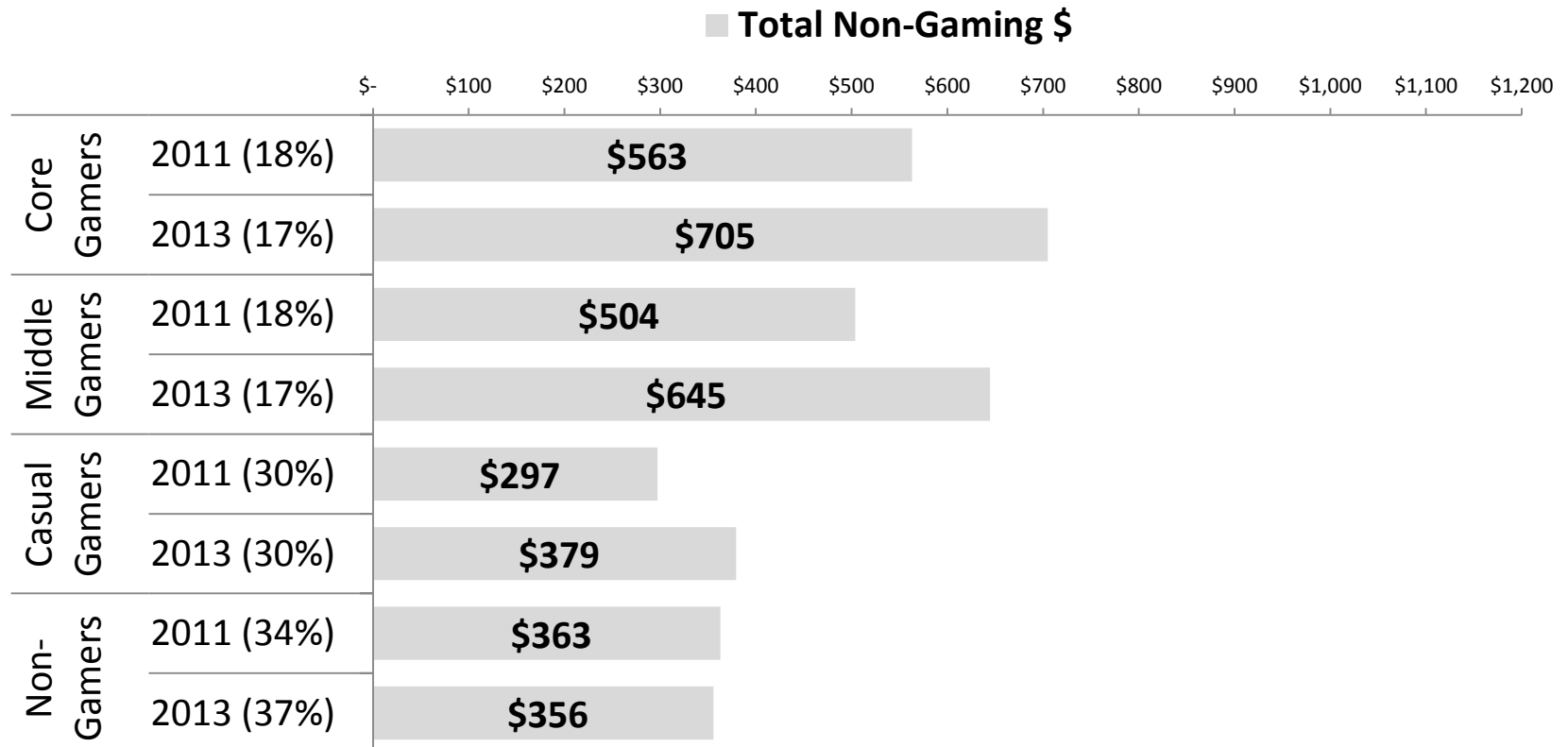
Visitors were divided into four categories based on lodging choice, spending and trip purpose.



Total Self-Reported Non-Gaming Spending by Gaming Segment

Self-reported spending increased among gamers, but stayed more consistent among non-gamers.

Spending: On average, how much money did you spend per person, per day for each of the categories below?
For hotel: How much did your accommodations cost per night? (excluding comped nights)

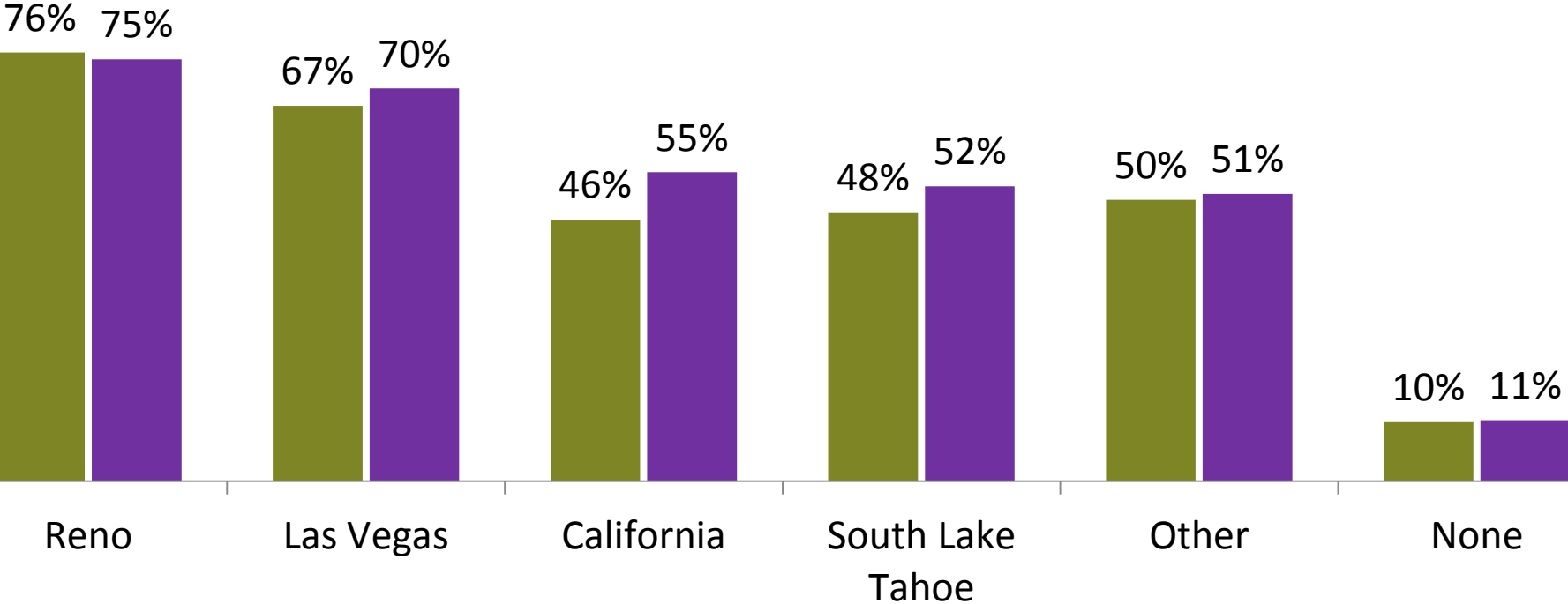


Casino Visitation in the Last Year

Self-reported visitation to Reno casinos did not change among Reno visitors, while self-reported visitation to California casinos increased slightly.

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

■ 2011 ■ 2013



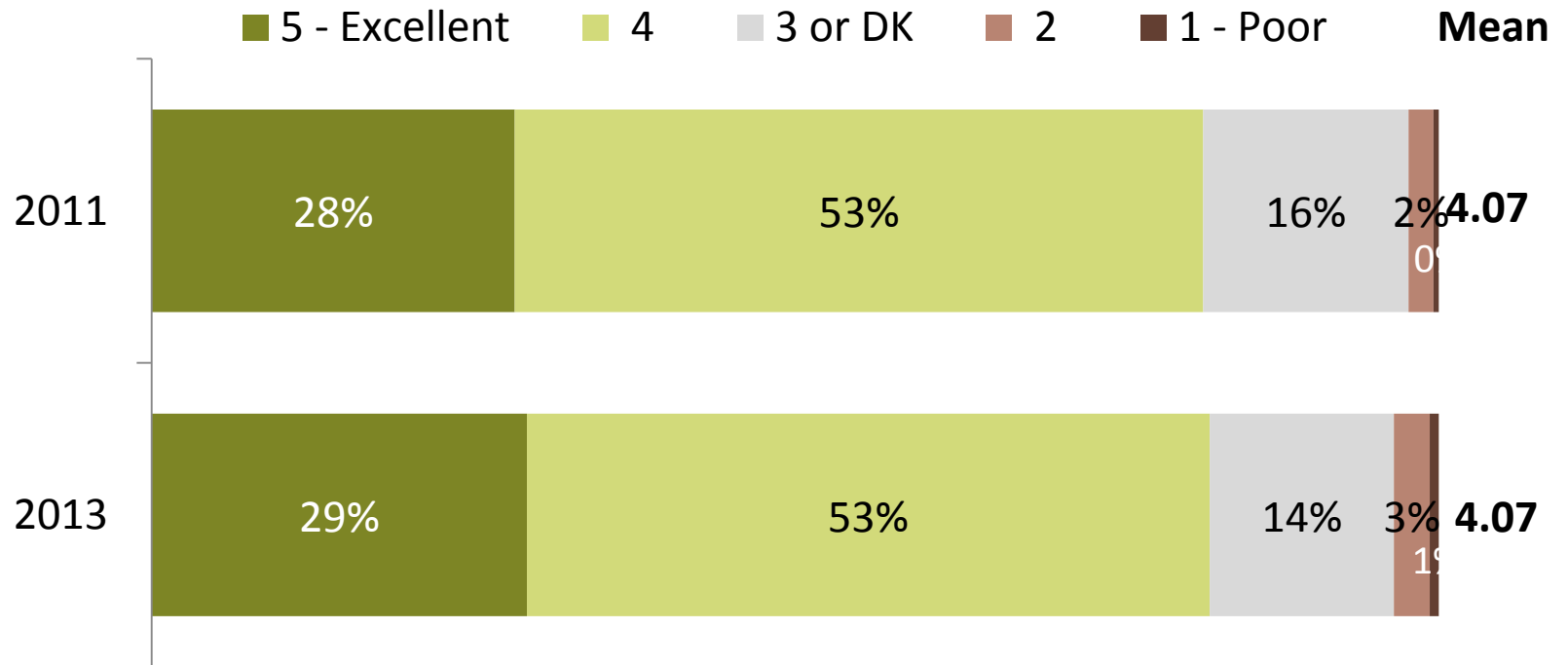
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Experience Ratings

Visitors continue to be very satisfied with their experience in the area.

On a 1-5 scale where 1 is Poor and 5 is Excellent, how would you rate your overall experience on your most recent trip to the Reno area?



What did you especially like about your experience?

If experience rating 4-5 (Good to Excellent): What did you especially like about your experience?

(Open-ended question, survey respondent types in response.)

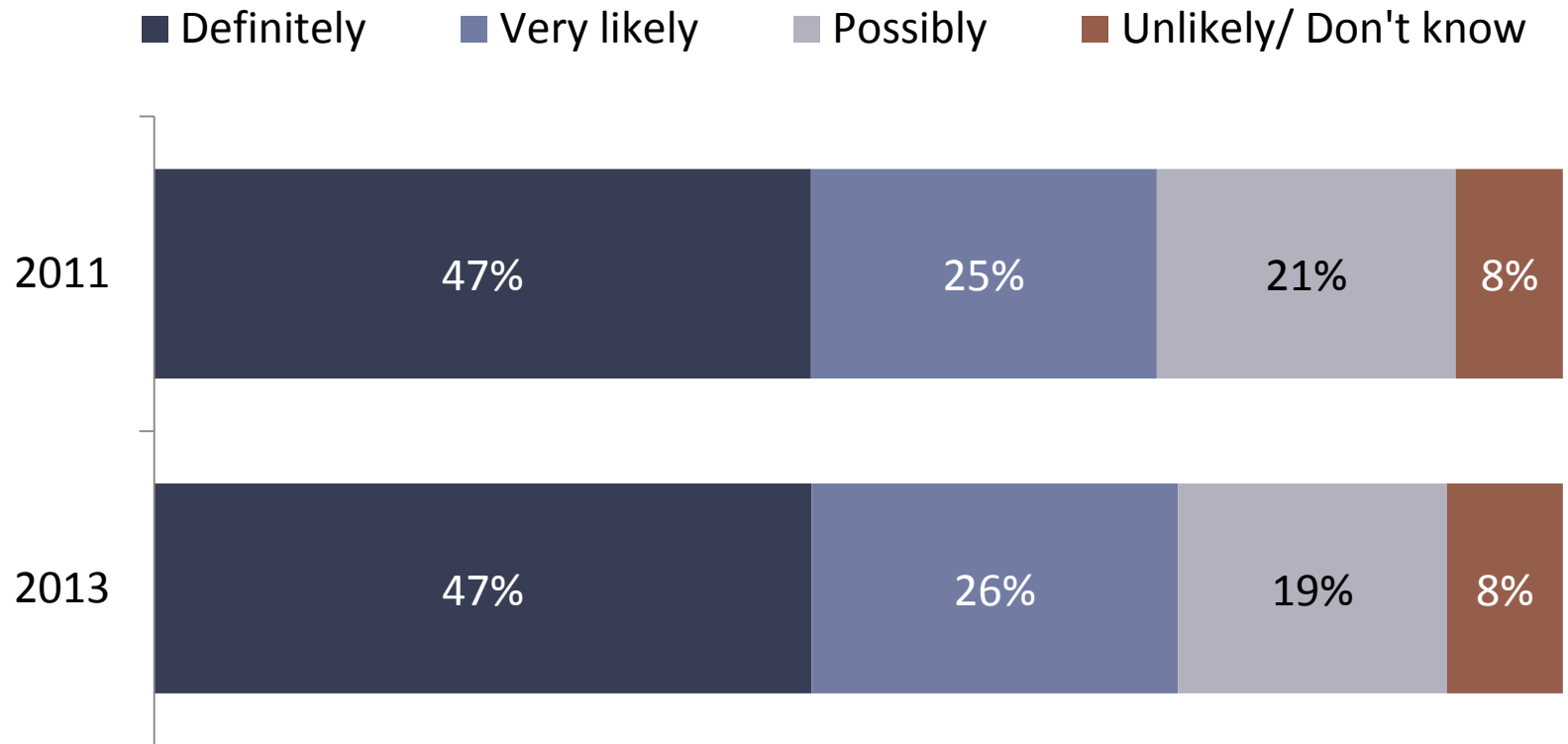


n=1637

Intent to Return

Nearly half of visitors say that they will definitely return to Reno.

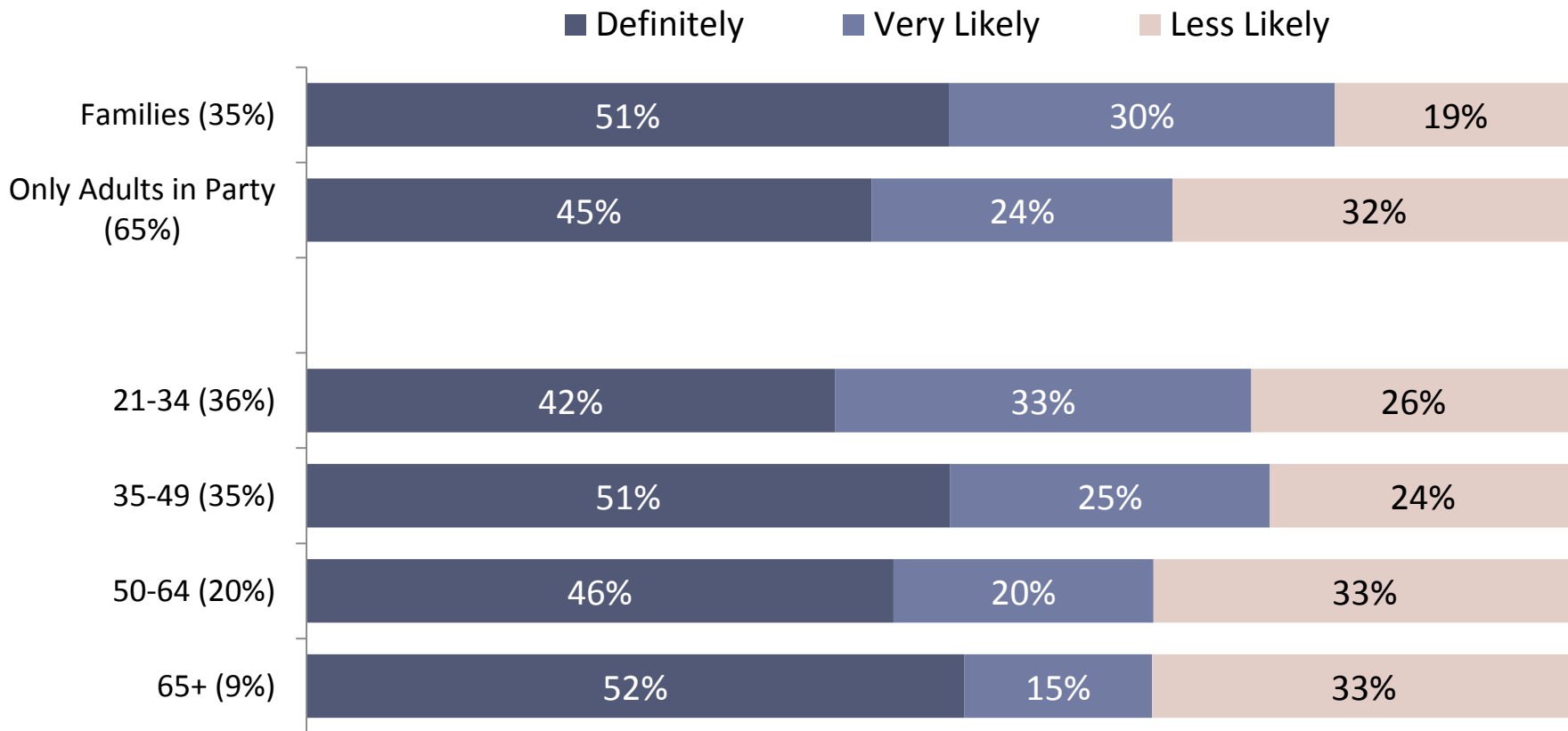
What is the likelihood that you will return to the Reno area in the next two years?



Intent to Return by Party Type and Age

Younger visitors and those who came with kids say they are likely to return.

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



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Conclusions

- ▶ The 2013 Visitor Profile Study confirms good news for the destination with a strong repeat visitor base and a slight widening of geographic reach beyond the northern California core customer.
- ▶ The survey also reveals that while gaming remains the core visitor activity, other events and activities are drawing visitors and their dollars.
- ▶ Families are identified in the data as an exciting opportunity for growth. More adults brought their children with them to the area compared with 2011. They stayed longer, spent more and left wanting to return.

Contacts



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