

2011 Visitor Profile Survey

Prepared for
RSCVA – February 23, 2012
Executive Summary for RSCVA Board of Directors



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Research goals

- Survey a representative sample of all 2011 visitors to Washoe County in order to better understand the visitor population
- Establish and track quantitative measures including: travel behaviors, activity participation, spending, visit satisfaction and visitor demographics
- Segment visitor market into groups to better understand core visitors and target visitors

Methodology

- Internet panel survey of Washoe County visitors age 21 and older
- Total annual responses: 2,797
- Conducted early in each month capturing visitors from the prior month
- Respondents reached using a nationally representative web panel screened for Washoe County visitors
- Margin of error ± 1.9 percentage points
- Screener population was weighted using geography, age, and gender to achieve a representative national sample, then respondent population was weighted by age to correct for web panel bias
- Comparison data for previous studies is shown if available and appropriate for comparison.

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

Key Findings

- Visitors to the area are overwhelmingly satisfied with their trip and plan to return to the area again.
- Visitors are coming from all over the country. While Californians, especially those from the Bay Area, continue to make up the core travelers to the area, the region is seeing a high percentage of visitors from the Midwest, the South and the Northeast. The area is also getting a significant number of visitors from the population-heavy Southern California region.
- The area's visitor population base is also demographically diverse by age and ethnicity. The older, core gaming customer continues to make up a significant percentage of visitors, but there are also many young people, couples in their 30s and 40s, families bringing children, and the area is seeing a significant percentage of Asian and Latino visitors as well.

Key Findings, continued

- The area's investment in events and visitor activities is paying off. The majority of visitors report that they spent at least some time gambling, but there is a wide variety of other activities that visitors report as their reason for coming or for what they did while in the area including: shopping at The Summit, attending Aces games, going to the Rib Cook-off, and seeing a show.
- Visitors coming to the region for shopping are an especially strong target for future growth. Shopping customers report very high satisfaction with their visit and report high levels of spending on shopping, lodging, dining, entertainment and gaming.

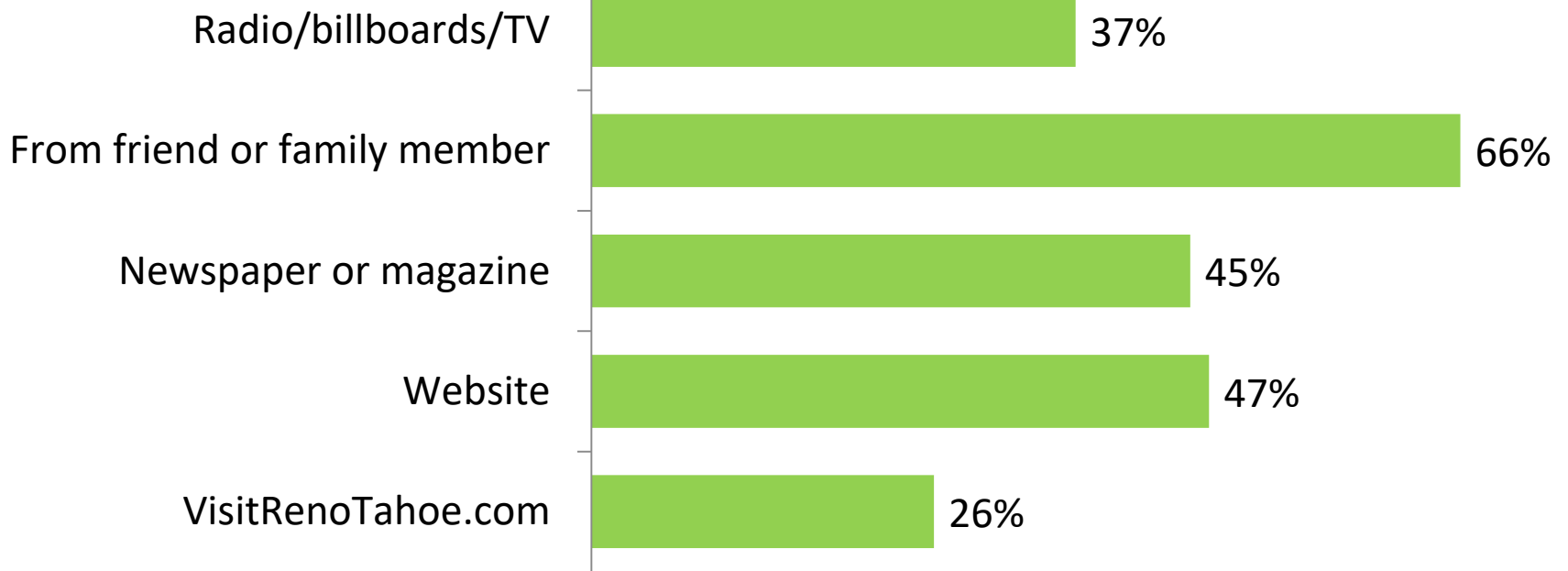


Visit Details

Reno media and awareness

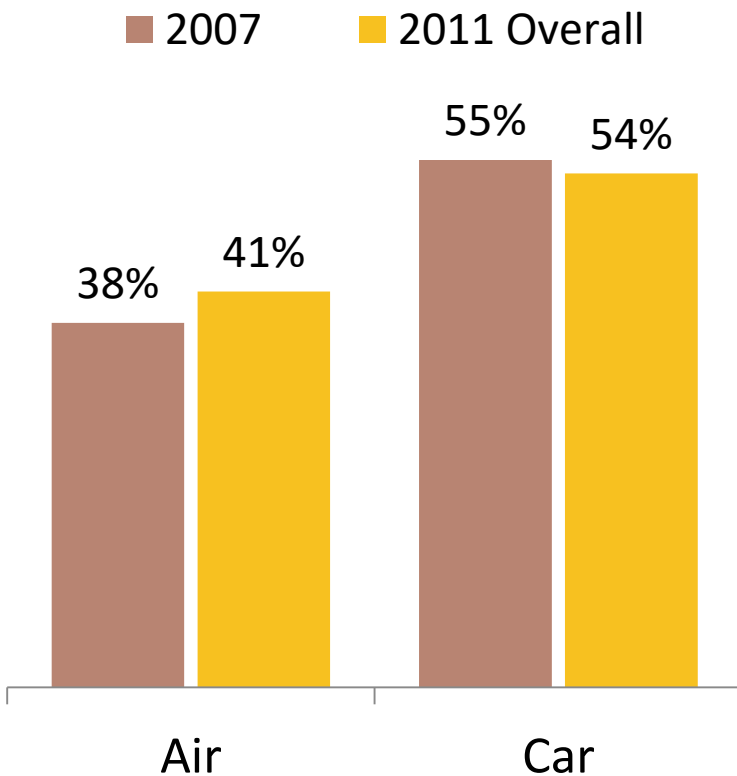
More than 2/3 of visitors discussed Reno with family and friends; More than 1/3 saw billboards/TV or heard radio about Reno before their visit; 1 in 4 have visited the RSCVA web site.

***Reno media and awareness:** Prior to your most recent visit, had you seen or heard anything about the Reno area? Have you ever visited Reno-Tahoe's website, www.VisitRenoTahoe.com?*

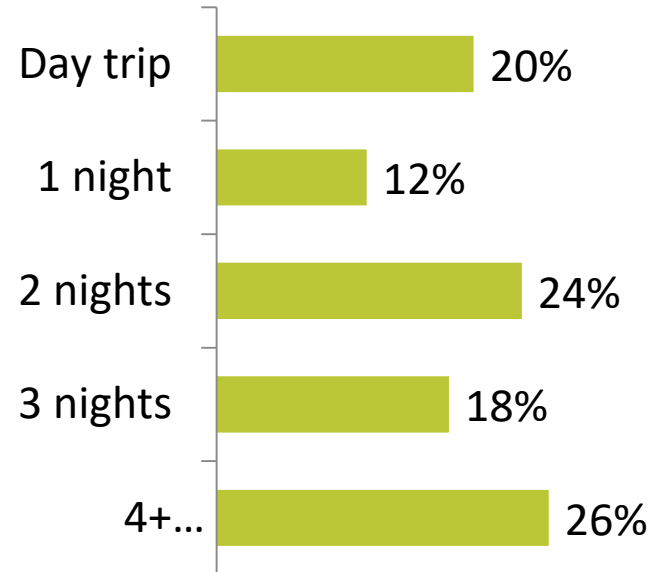


Travel mode and length of stay

Primary Method of Travel



Length of Stay in Nights

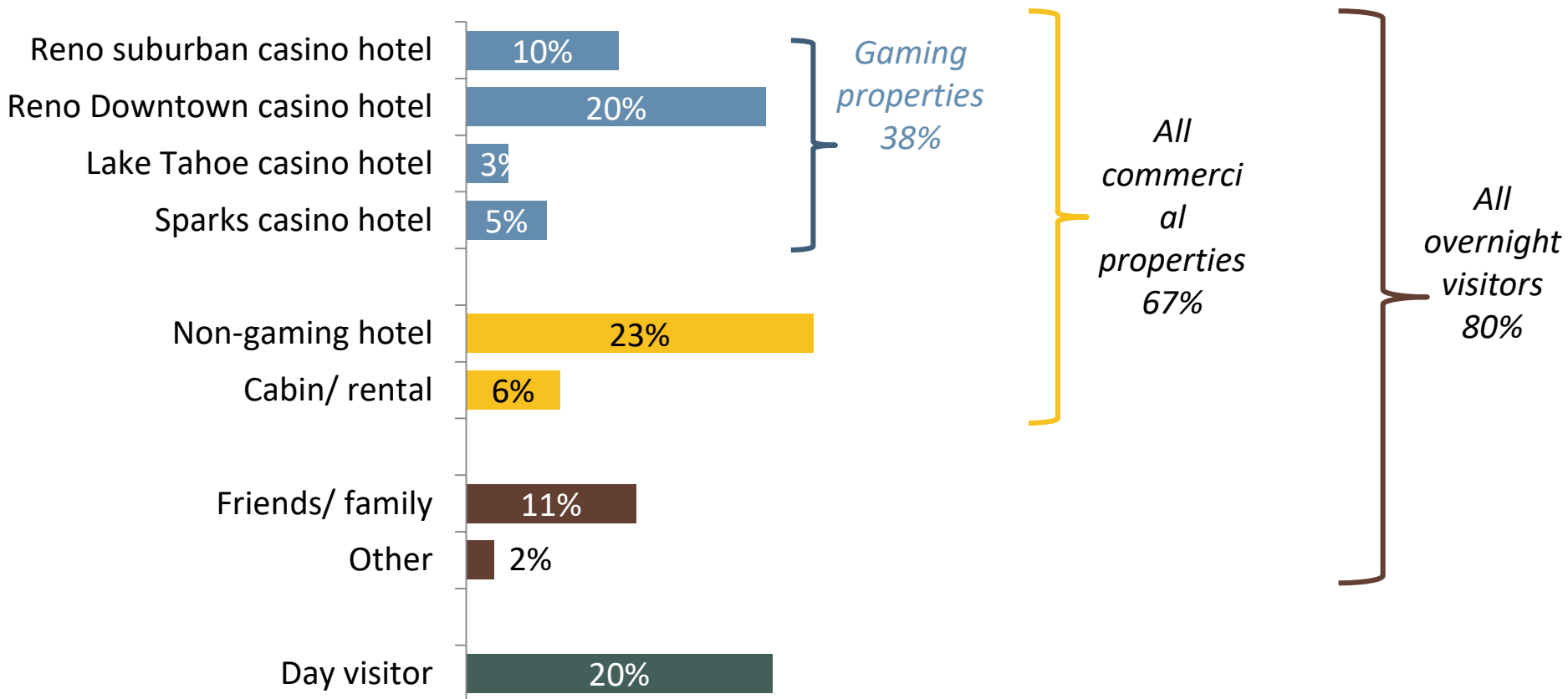


Average length of stay in nights

Overall (incl. day visitors)	2.82
Overnight visitors only	3.50
Overnight gaming property	3.15
Overnight commercial property	3.77
2007 overnight visitors only	3.3

Overnight accommodations

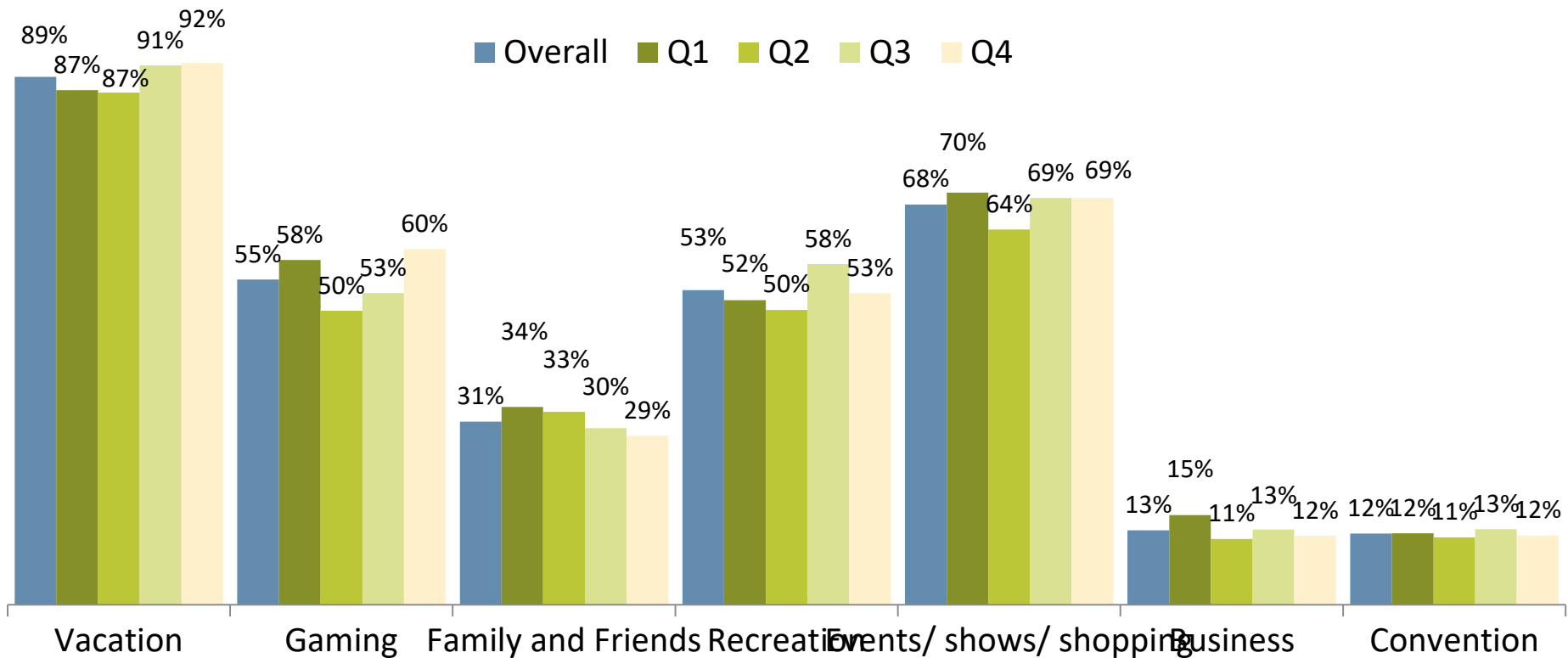
80% of visitors stayed overnight, 68% stayed at commercial properties, and 38% stayed at gaming properties.



Visitor Activities and Spending

Participation in all activities during trip

Visitor activities: Did you participate in any of the following activities during your most recent trip to the Reno area? (Multiple responses accepted, responses grouped into categories)



Activity detail

Visitor activities: Did you participate in any of the following activities during your most recent trip to the Reno area?
 (Respondents may select multiple activities, percentages do not add to 100%)

Activity	Overall	Q1	Q2	Q3	Q4
Rest & relax	62%	61%	62%	66%	58%
Gamble	55%	58%	50%	53%	60%
Shop	49%	51%	46%	49%	50%
Shopping at Legends/ Scheels/ Meadowood/ Summit	42%	46%	40%	43%	40%
Visit friends or relatives	28%	31%	29%	27%	26%
Hike/Bike	23%	17%	21%	29%	24%
Go to a spa	17%	16%	16%	18%	14%
Golf	15%	11%	16%	21%	11%
Raft/Swim/Kayak	15%	9%	15%	23%	9%
Bowl	12%	15%	15%	10%	11%
Ski/ Snowboard/ Snowshoe	12%	20%	9%	7%	13%
Wedding/ honeymoon friend or family event	8%	8%	10%	8%	7%
Other sports activities	11%	10%	10%	12%	12%

Activity detail

Visitor activities: *Did you participate in any of the following activities during your most recent trip to the Reno area?
(Respondents may select multiple activities, percentages do not add to 100%)*

Activity	Overall	Q1	Q2	Q3	Q4
Visit Reno	53%	46%	50%	57%	56%
Visit Lake Tahoe	41%	41%	38%	43%	42%
Total – specific special event/ convention*	18%	11%	12%	24%	22%
Total – specific shows/ entertainment/ live sports*	23%	26%	27%	23%	18%
Other sightseeing	21%	23%	18%	20%	22%
Visit Carson City	18%	17%	20%	19%	17%
National Auto Museum	14%	15%	14%	15%	13%
Nevada Museum of Art	14%	14%	14%	16%	11%
Conduct business	13%	11%	12%	16%	13%
Visit Truckee	13%	11%	12%	16%	12%
Visit Sparks	13%	15%	11%	13%	12%
Visit Virginia City	12%	13%	8%	14%	12%
Convention/trade show/ seminar/reunion	11%	8%	11%	12%	11%

** See next page for specific events selected*

Top individual events/entertainment/sports

Visitor activities: *Did you participate in any of the following activities during your most recent trip to the Reno area?
(Respondents may select multiple activities, percentages do not add to 100%)*

Survey listed 10-12 specific events/shows/conventions each month; top responses shown below.

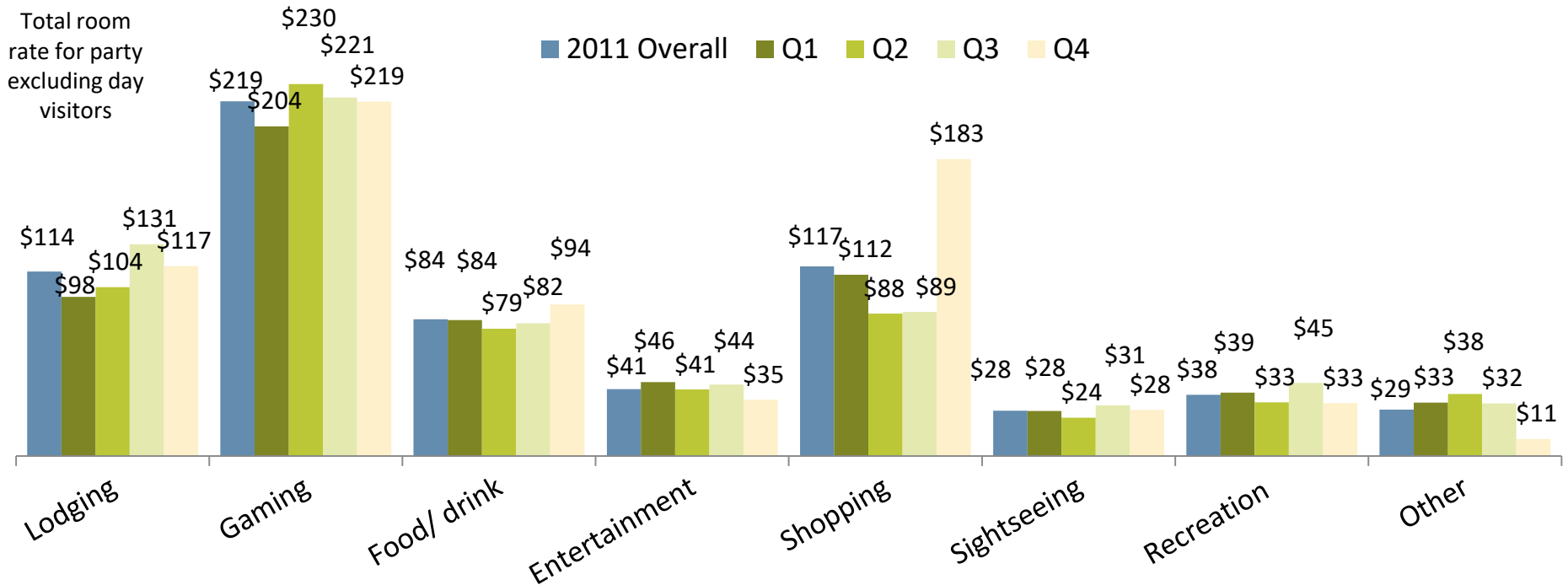
Activity	# of respondents	% of respondents
Reno Aces baseball game	97	5%
Illuminaire	71	3%
Star Spangled Sparks Fireworks or any other local fireworks show	49	2%
Hot August Nights	49	2%
USBC Open Championships	47	2%
Reno Beer Crawl	42	2%
Hairspray	41	2%
Bighorn Basketball	37	2%
Nugget Best in the West Rib Cook-off	35	2%
Buddy, the Buddy Holly Story	34	2%
Artown	33	2%

Spending by category for 2011 quarters

Spending on gaming topped all categories; spending on recreation fluctuated seasonally.

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

(Hotel Spending: Cost of accommodations per night (excluding comped nights).

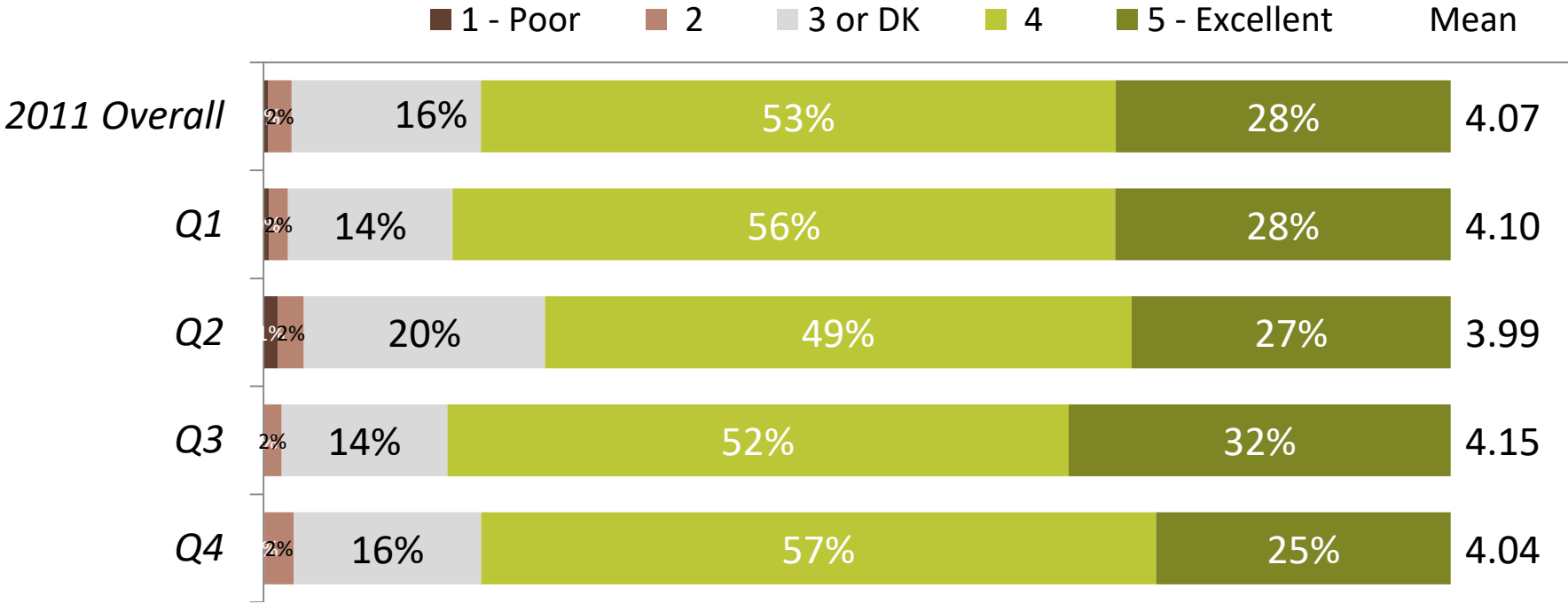


Visit Satisfaction and Intent to Return

Experience ratings

Visitor satisfaction is high, with more than 3 in 4 rating their trip a 4 or 5 on a 1-5 scale.

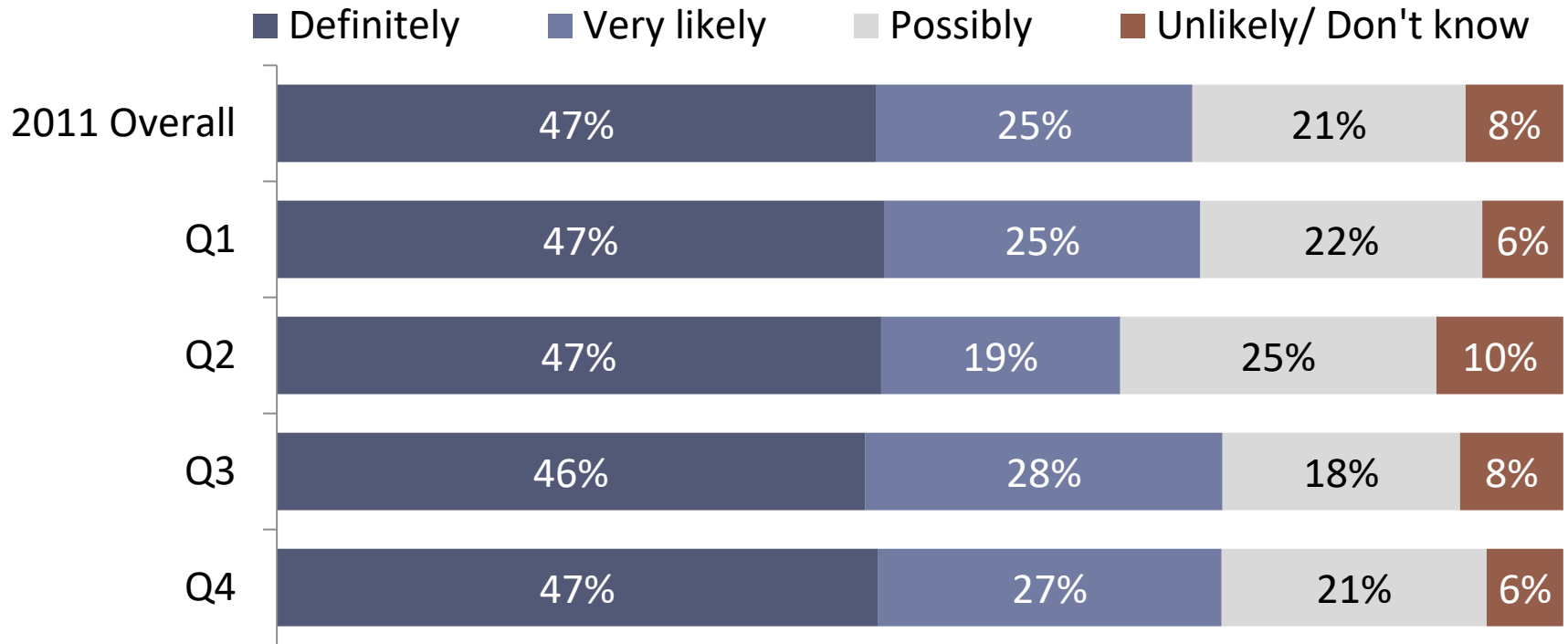
On a 1-5 scale where 1 is Poor and 5 is Excellent, how would you rate your overall experience on your most recent trip to the Reno area?



Intent to return

47% of Washoe County visitors say they will “definitely” return.

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

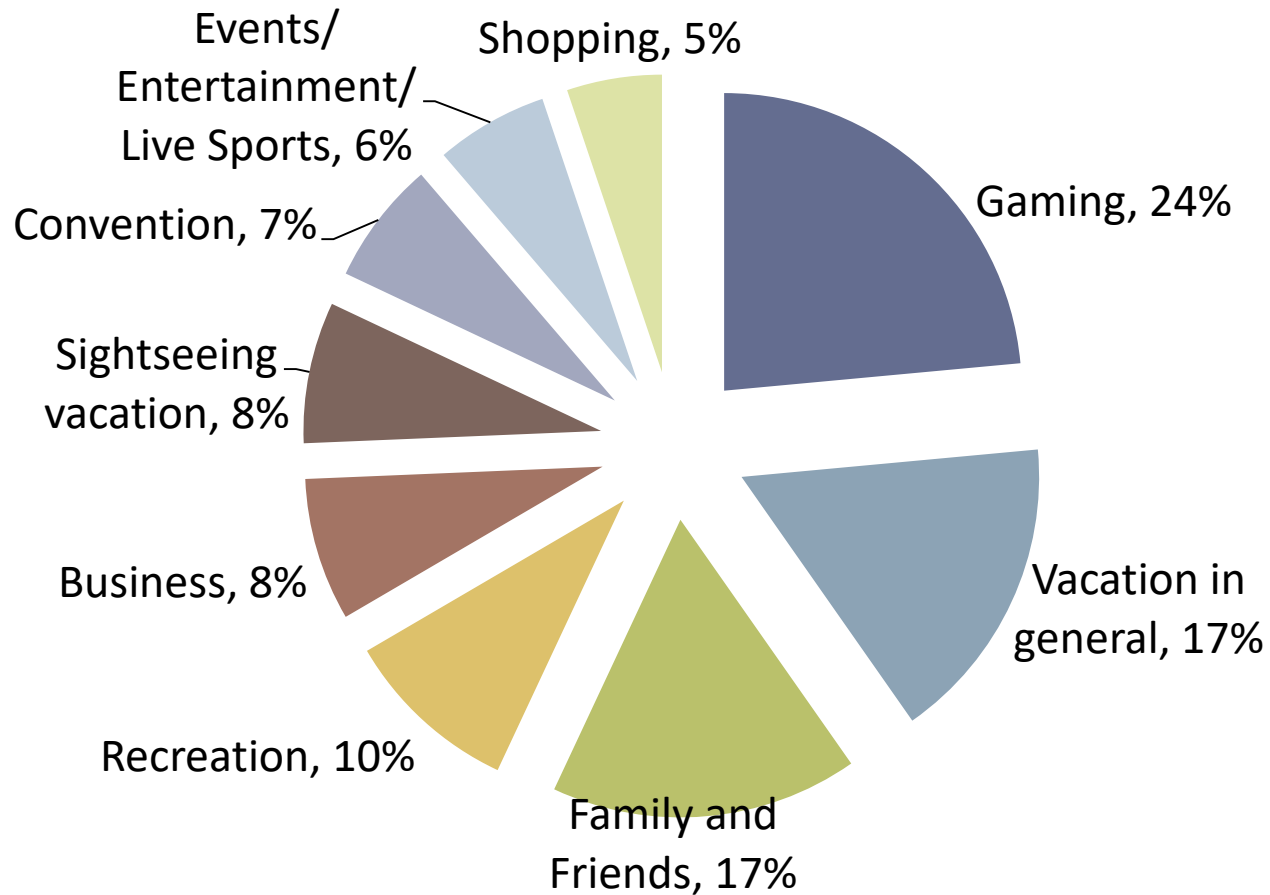




Visitor Types

Visitor Type segmentation

Respondents were placed into 8 profile groups by combining the primary purpose for their visit with activities and spending responses.



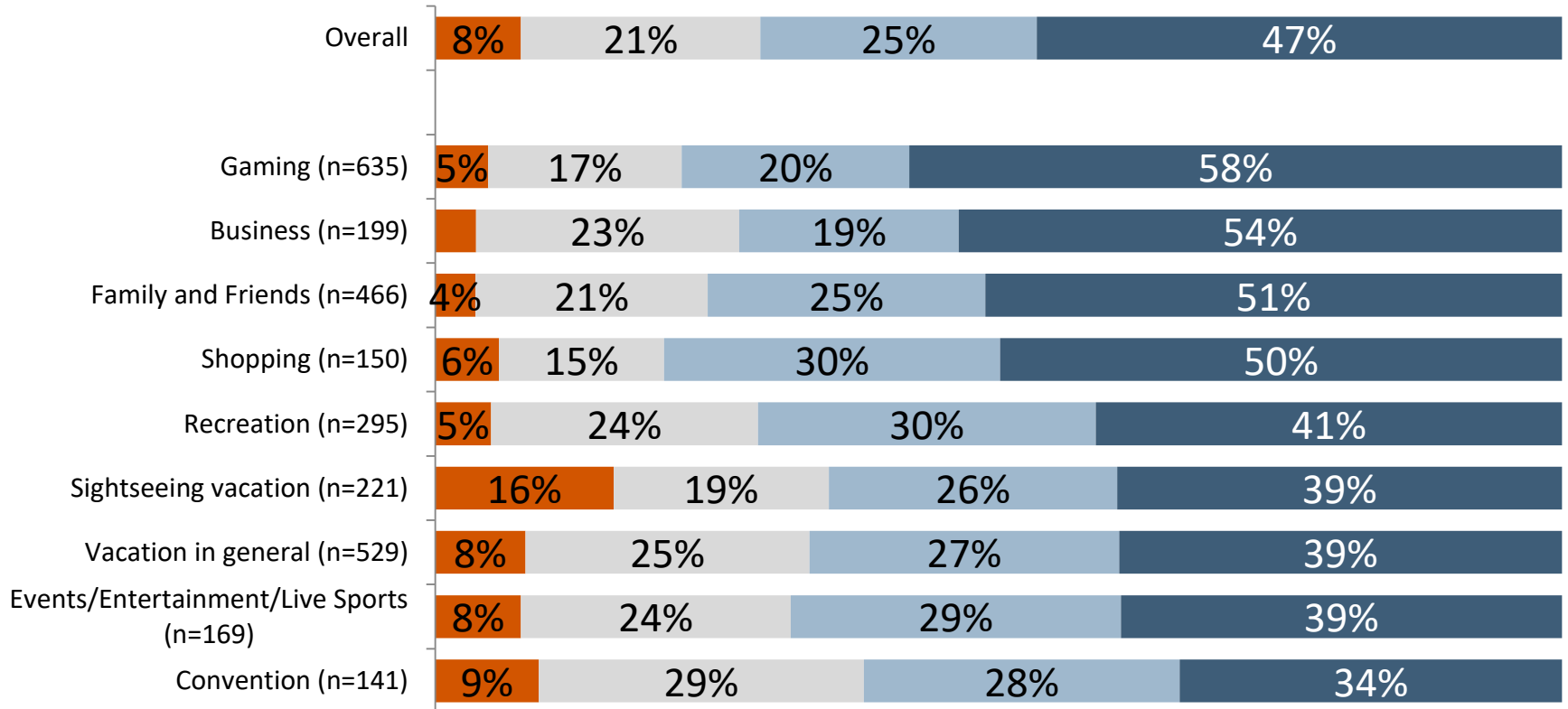
Intent to return by visitor type

Return visits:

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

■ Unlikely/ Don't know
 ■ Possibly
 ■ Very likely
 ■ Definitely

VISITOR TYPE



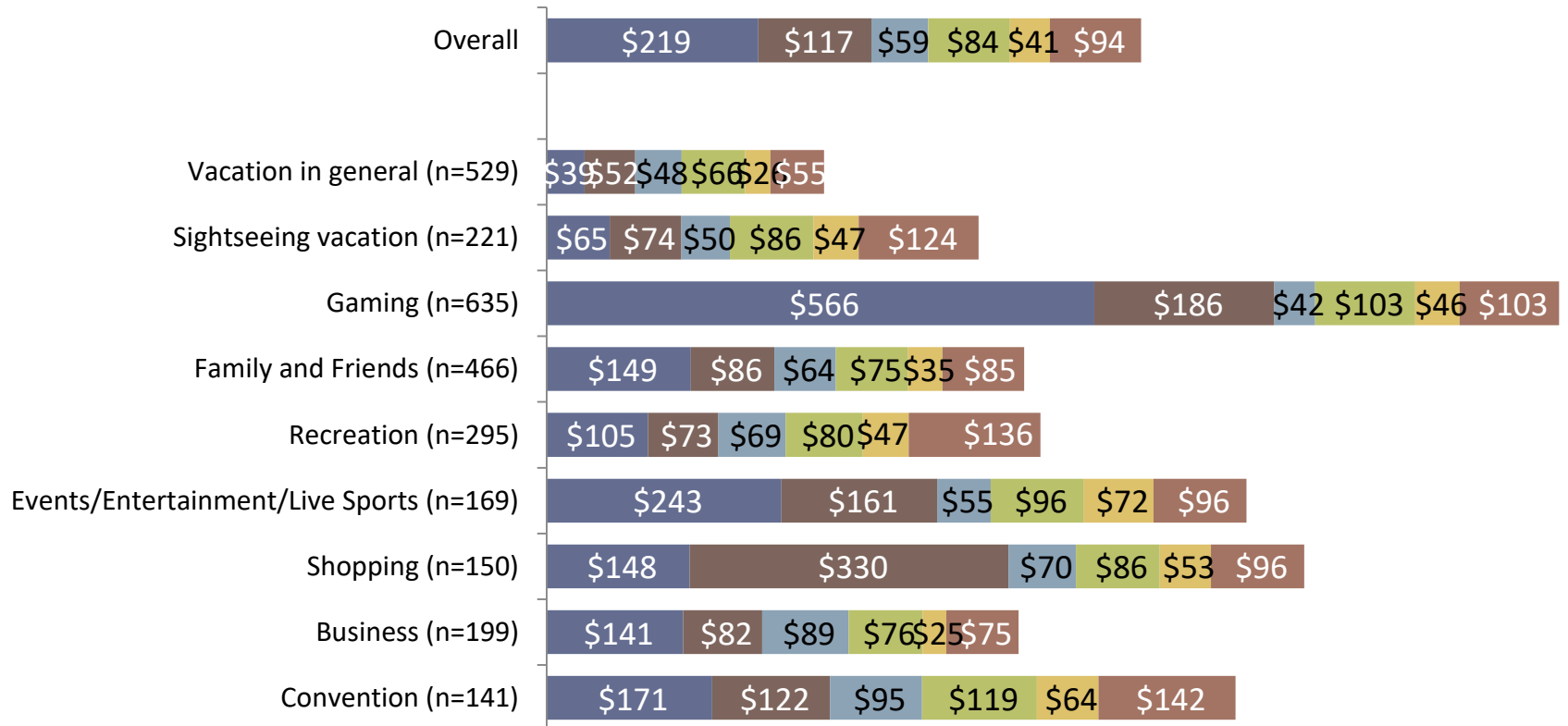
Spending by visitor type

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 \$ ■ Shopping \$ ■ Lodging rate \$ ■ Food/drink \$ ■ Entertainment \$ ■ Other \$

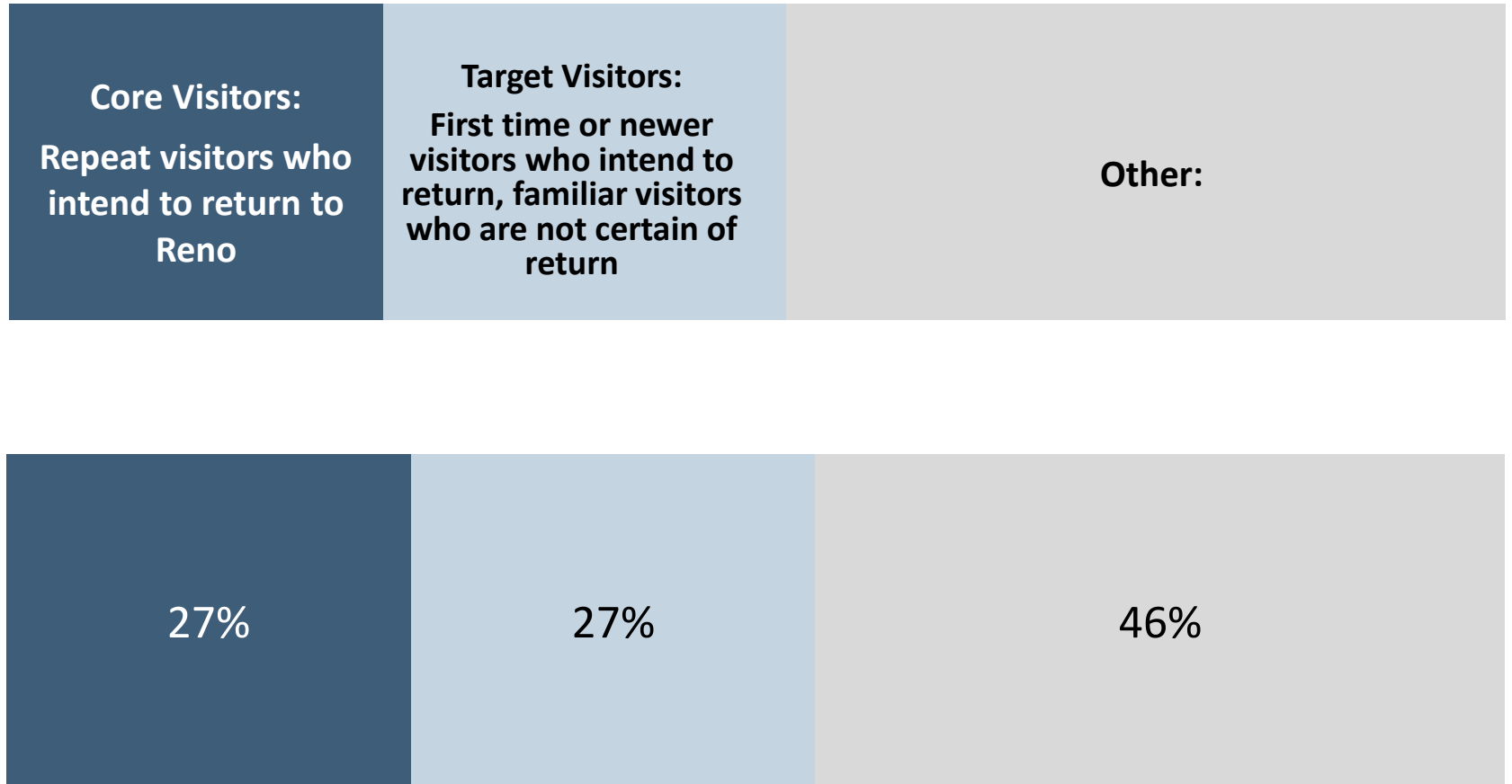
VISITOR TYPE



Core Visitors and Target Visitors

Visitor segmentation

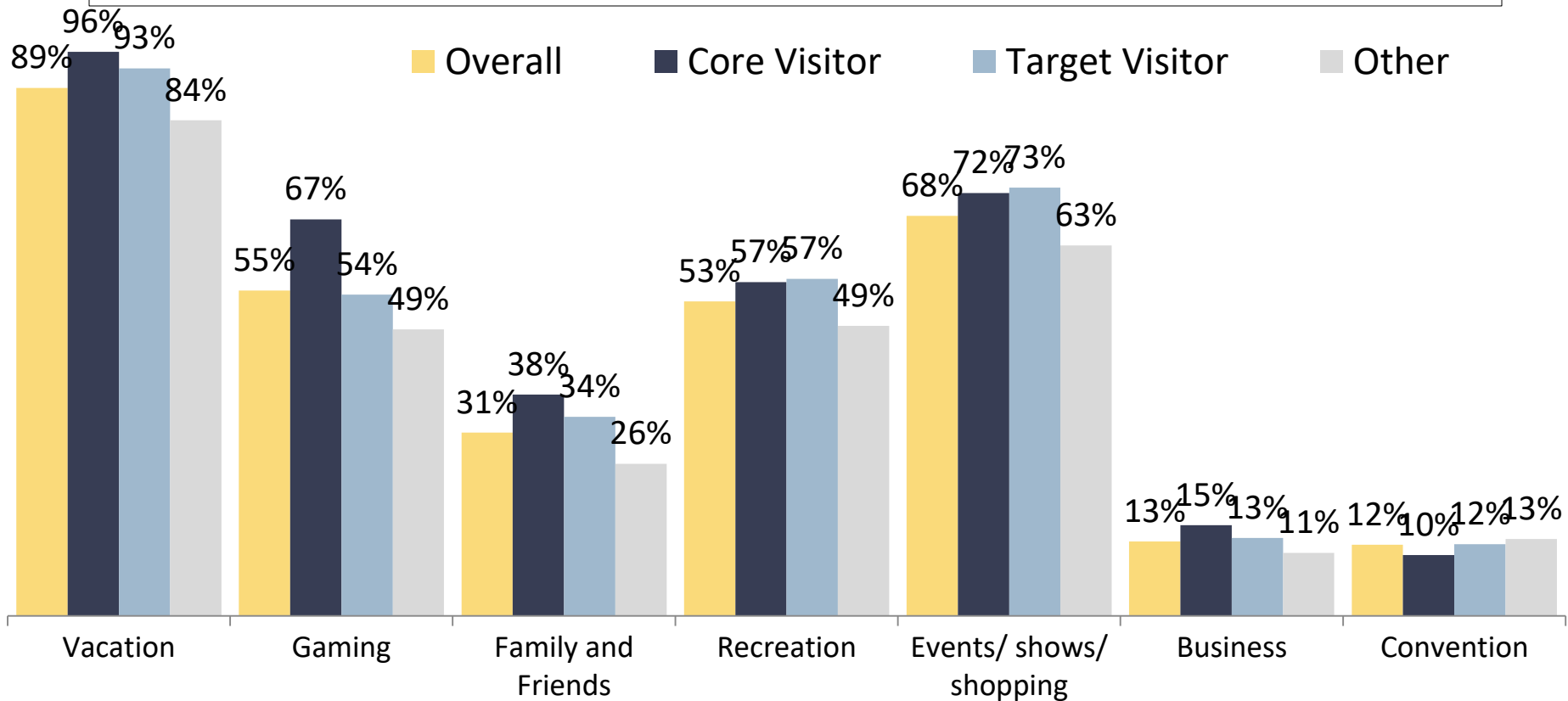
Voters were divided into three categories:



Activity participation by Visitor Segments

Core visitors are more likely to take part in a variety of activities

Visitor activities: Did you participate in any of the following activities during your most recent trip to the Reno area? (Responses grouped into categories)



Target visitor events and activities

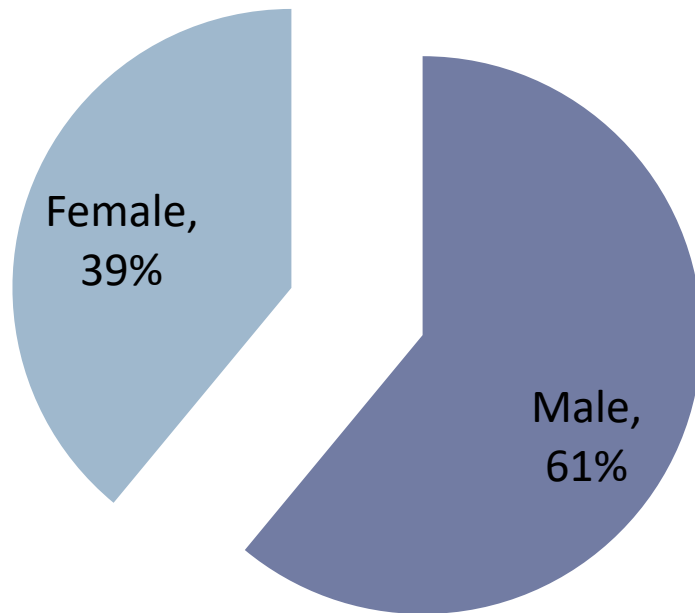
Top activities		Top events
Rest & relax		Reno Aces baseball game
Gamble		Illuminaire
Visit Reno		Bighorn Basketball
Shop		Casino Halloween Party
Visit Lake Tahoe		USBC Open Championships
Shop at Legends/ Scheels/ Meadowood/ Summit		Hairspray
Visit friends or relatives		Buddy, the Buddy Holly Story
Hike/ Bike		Downtown Reno Wine Walk
Visit Carson City		Reno Rodeo
Go to a spa		Artown



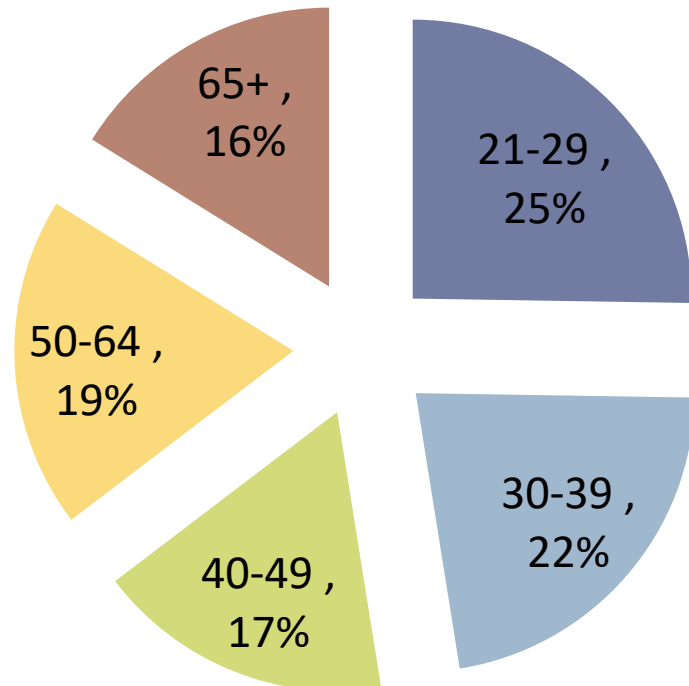
Visitor Demographics

Visitor sample demographics: Gender, Age

Gender

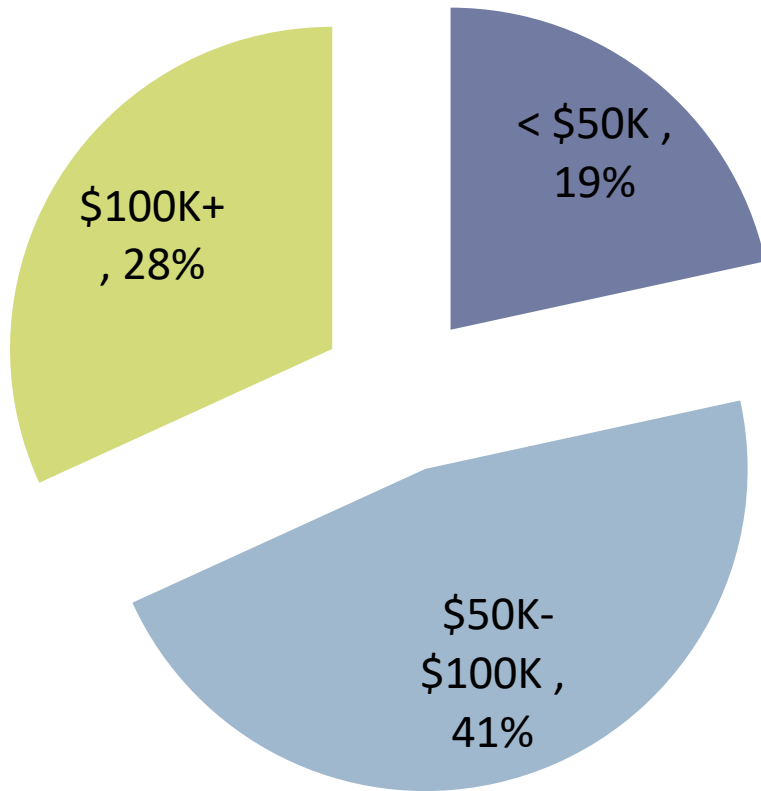


Average Age: 44

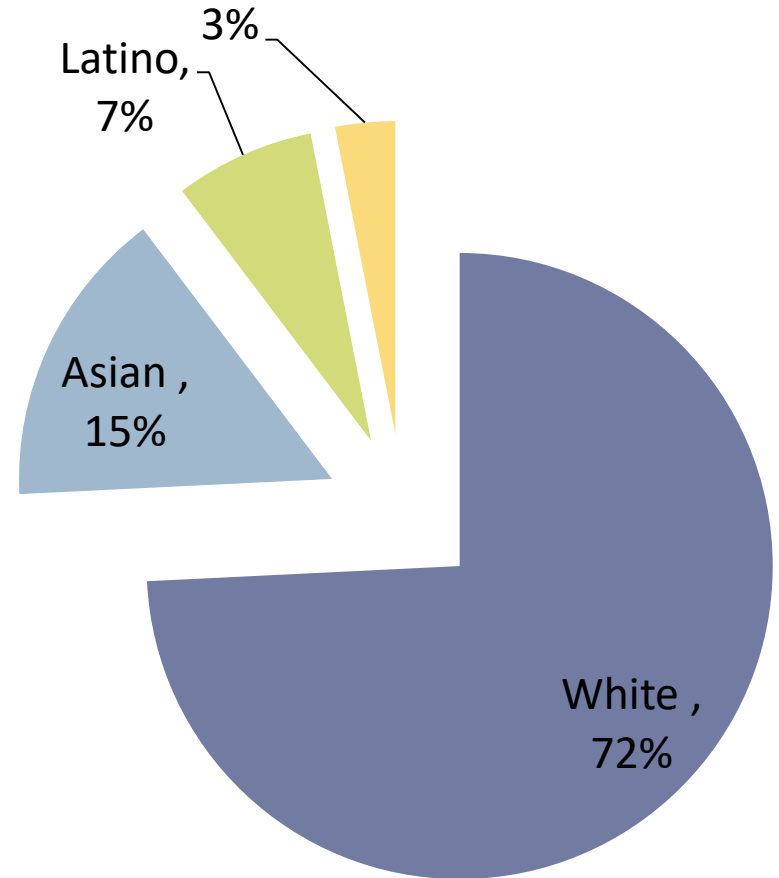


Visitor sample demographics: Income, Race

Income



Race



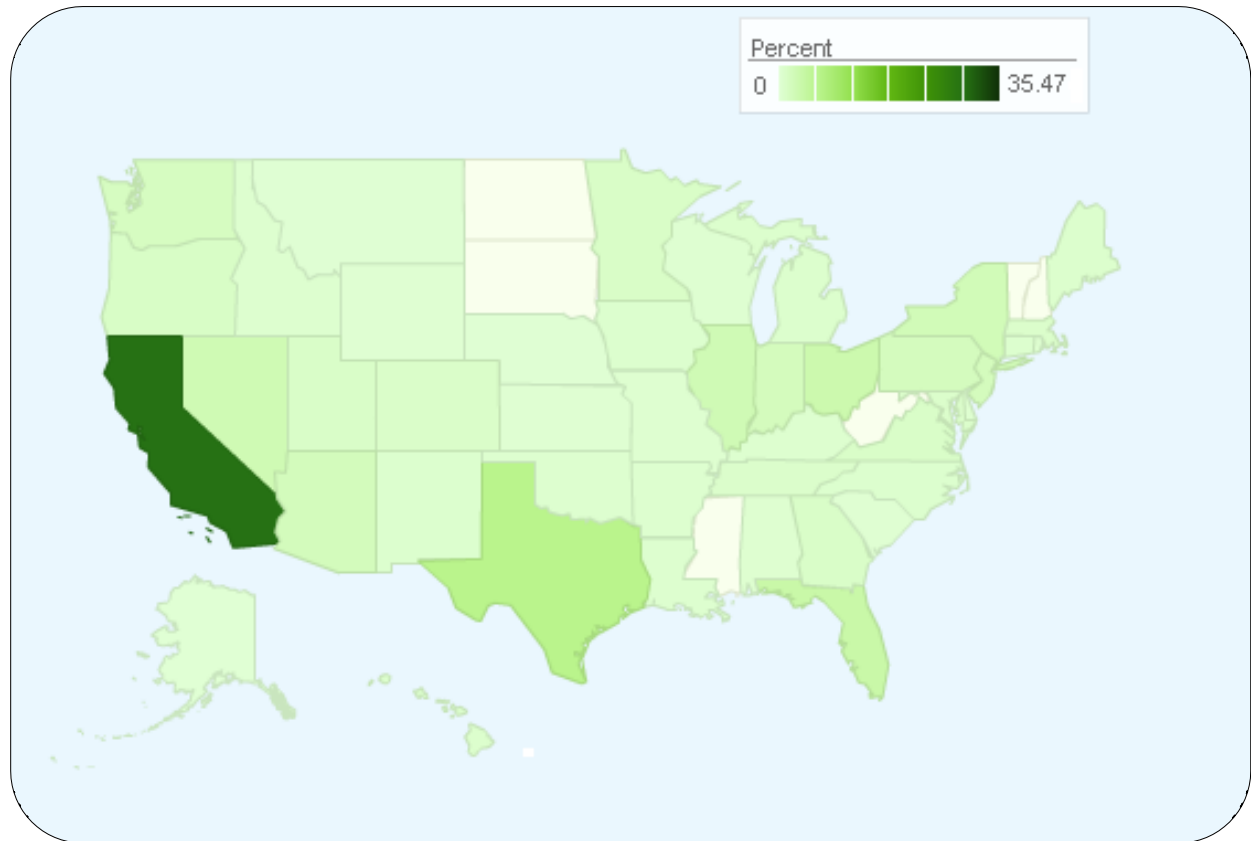
Visitors by home state

Visitors by Region

- West 58%
- Midwest 12%
- South 19%
- Northeast 11%
- Western Canada 2%

Top States by % of Visitors

- California 39.1%
- Texas 5.1%
- Florida 4.3%
- Nevada 4.1%
- New York 3.7%
- Illinois 3.0%
- Arizona 2.9%
- Ohio 2.8%
- New Jersey 2.6%
- Washington 2.5%



California visitors

Region of California

- San Francisco Bay Area 36.8%
- Los Angeles Area 26.7%
- Sacramento Area 18.6%
- Central Valley 7.1%
- San Diego Area 5.5%
- North 3.5%
- Central Coast 1.8%





Discussion