



***Reno Tahoe 2019 Visitor Profile Survey
Executive Summary Report
January – December 2019
Reno-Sparks Convention and Visitors Authority***

- ▶ Monthly surveys of prior-month Washoe County visitors age 21 and older
- ▶ Survey respondents selected at random from a national web panel of adult residents
- ▶ 3,600 respondents screened nationally to participate each month:
 - 1,600 screened monthly across all of US and Western Canada
 - Additional 2,000 screened monthly in Western region: Alaska, Arizona, California, Colorado Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming, and Alberta and British Columbia, Canada
- ▶ Respondents to screeners weighted to reflect actual population distribution for geography, age, and gender
- ▶ Total of 43,354 respondents screened for 2019 survey; 2,139 visited Washoe County and responded to full survey
- ▶ When applicable, 2019 results are compared to the 2011, 2013, and 2015 RSCVA Visitor Profile Surveys of identical methodology

Summary of Findings

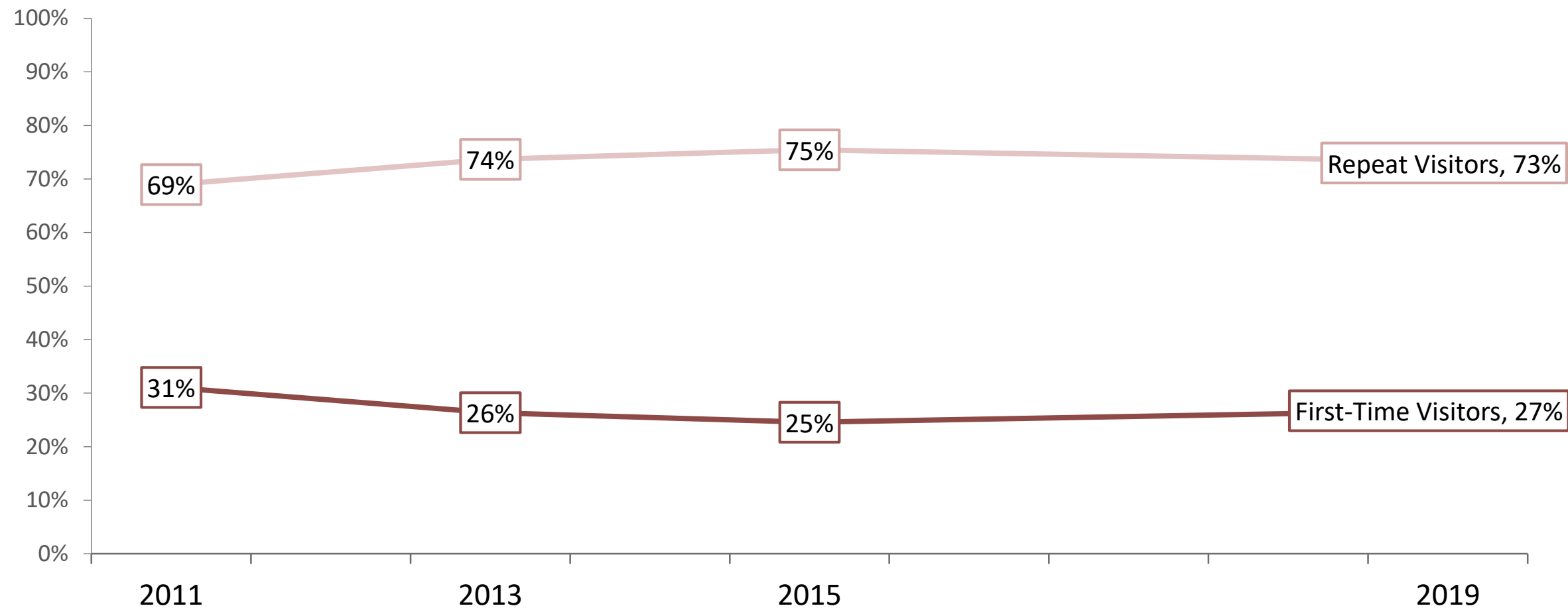
- ▶ Three quarters of Reno area visitors have visited before. For visitors, Reno is fun, a good value, and convenient, as well as a place where they can indulge in nature, arts, and entertainment.
- ▶ Reno's visitors are increasingly younger and bringing their families, and most are gaming while they visit, at least casually.
- ▶ California continues to figure prominently in Reno visitation, with Los Angeles area residents making up an increasing share of visitors.
- ▶ Most visitors to the area stay overnight, with increasing numbers staying in commercial non-gaming properties. Bookings are increasingly made through online aggregators, and less often directly with a property.
- ▶ Three quarters of visitors said they attended an event or sporting event while visiting, with the wine walk, pub crawl, and Aces and 1868 FC games among the most mentioned.
- ▶ Most visitors report satisfaction with their visit, and more than half said they would definitely return for another visit.



Awareness and Media:
*How and what do visitors
hear about Reno?*

Past Visitation

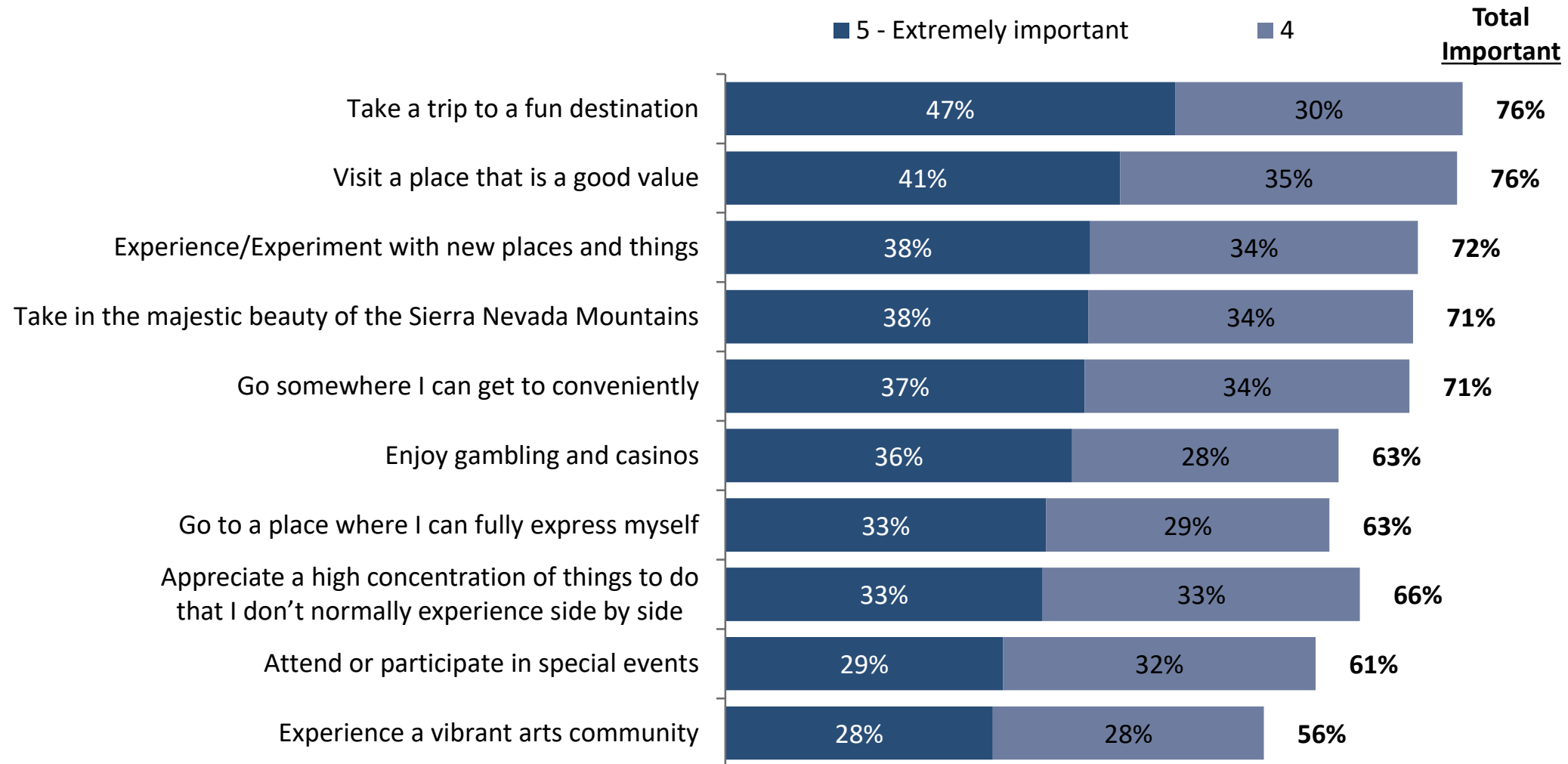
Three quarters of visitors are repeat visitors to the Reno area.



Q2. Before this visit, approximately how many times had you been to the Reno area in 2019, prior to (INSERT MONTH OF VISIT)?*

Key Motivators for Visiting

Visiting a “fun destination” and a “place that is a good value” are top drivers for visiting Reno.



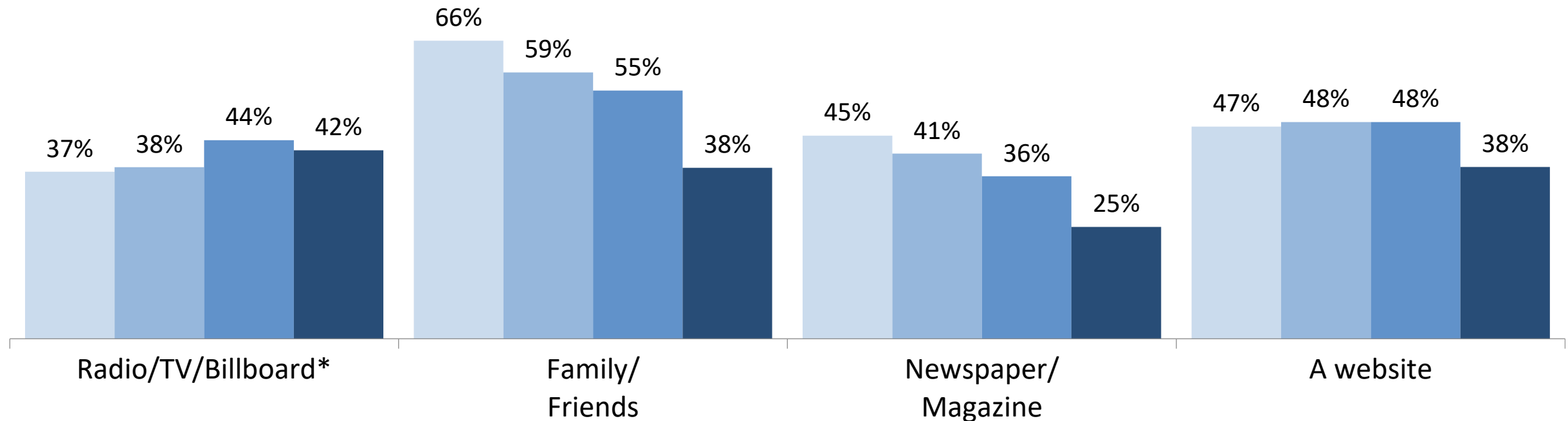
Q27-43. Using the scale below, please indicate how important each of the following was in deciding to visit the Reno area.

Reno Media Awareness Sources

While fewer say they are hearing about Reno from family and friends or through traditional print media, a consistent two in five visitors recall other paid campaign channels.

Responses are out of 71% of visitors who heard something about Reno before their trip.

2011 2013 2015 2019

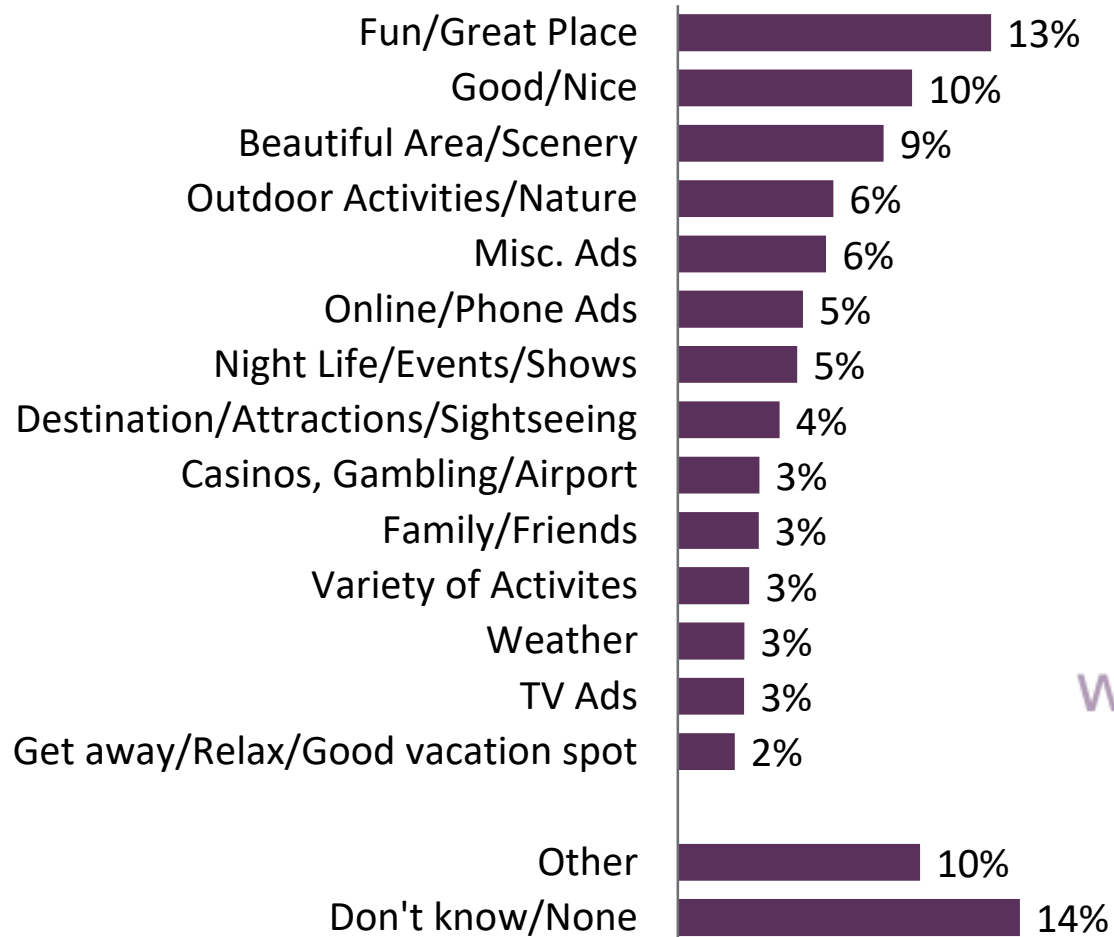


Q55. Where did you hear/see something about Reno Tahoe?

*Radio, TV, and Billboard combined for tracking.

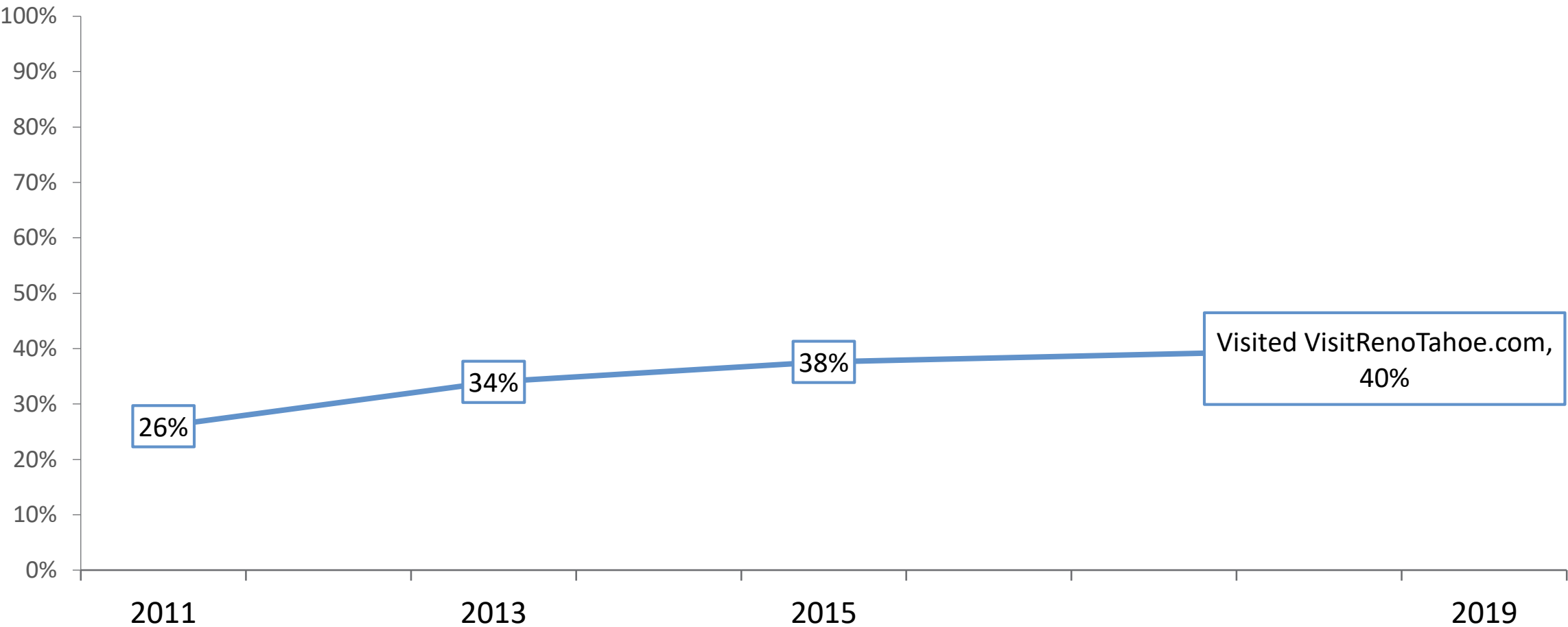
Reno Content Recall

Of those who had heard or seen something about Reno, most make positive comments about the area generally, or the outdoor activities and natural scenery.



VisitRenoTahoe Website Visitation

Visitation to the VisitRenoTahoe website continues to grow.



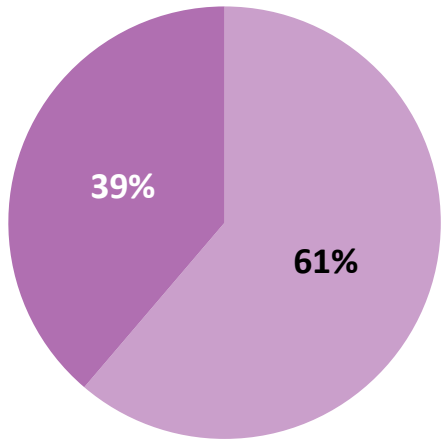


Visitor Demographics and Trip Details: *Who visits Reno?*

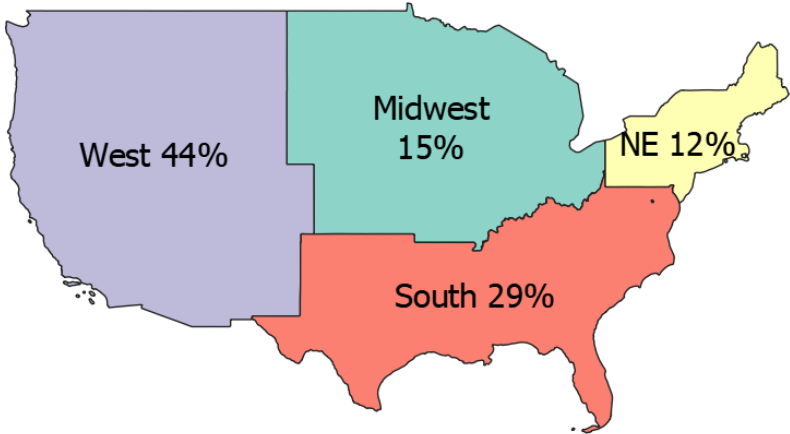
2019 Visitor Demographics

Gender

- Male
- Female

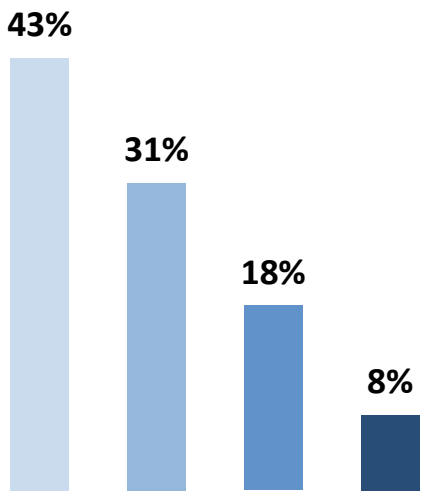


42% Traveling with kids
58% Traveling without kids



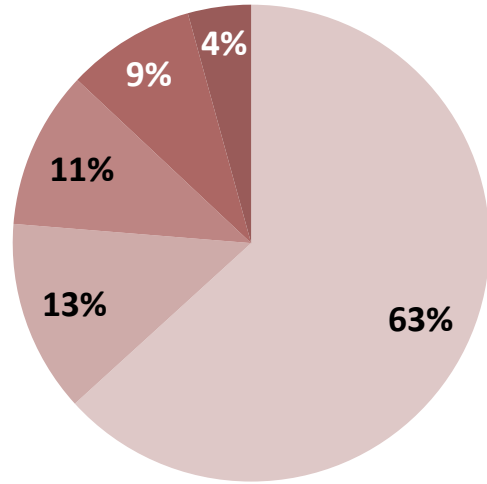
Age

- 21-34
- 35-49
- 50-64
- 65+



Ethnicity

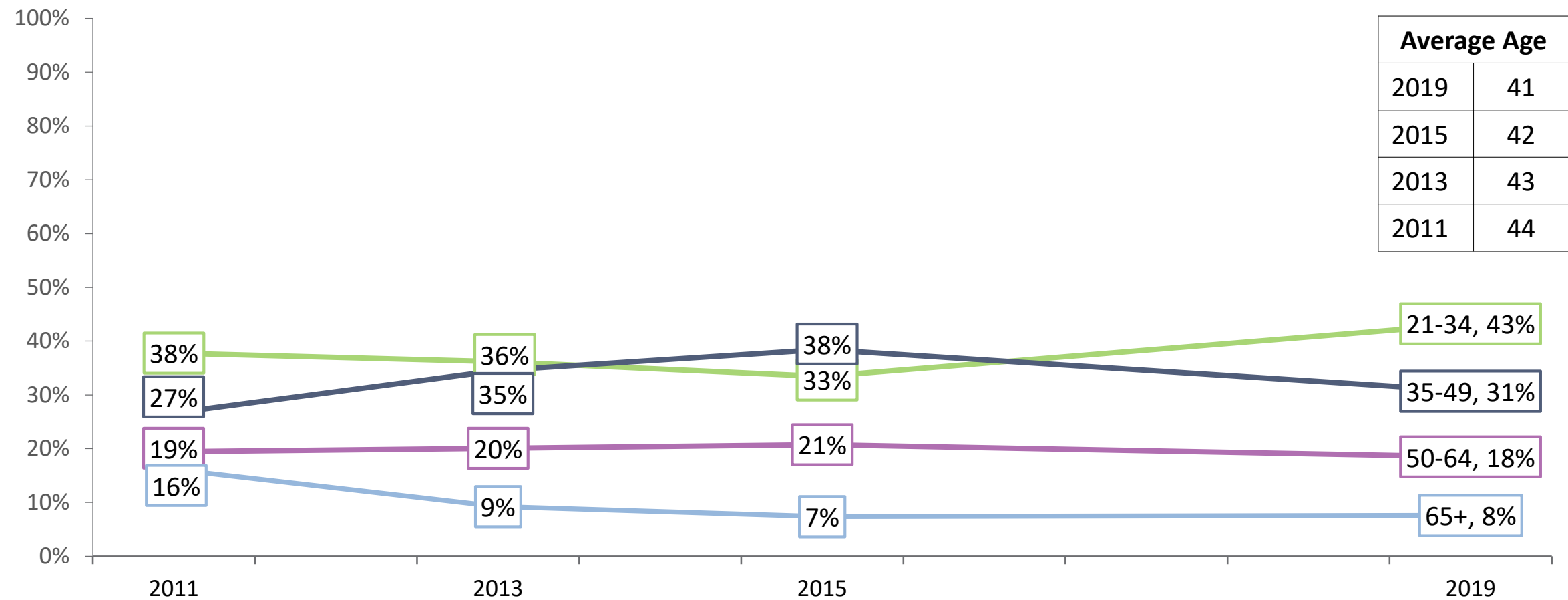
- White
- African American
- Asian
- Latino
- Other/Prefer not to respond



6% LGBTQIA
91% Straight
3% Prefer not to respond

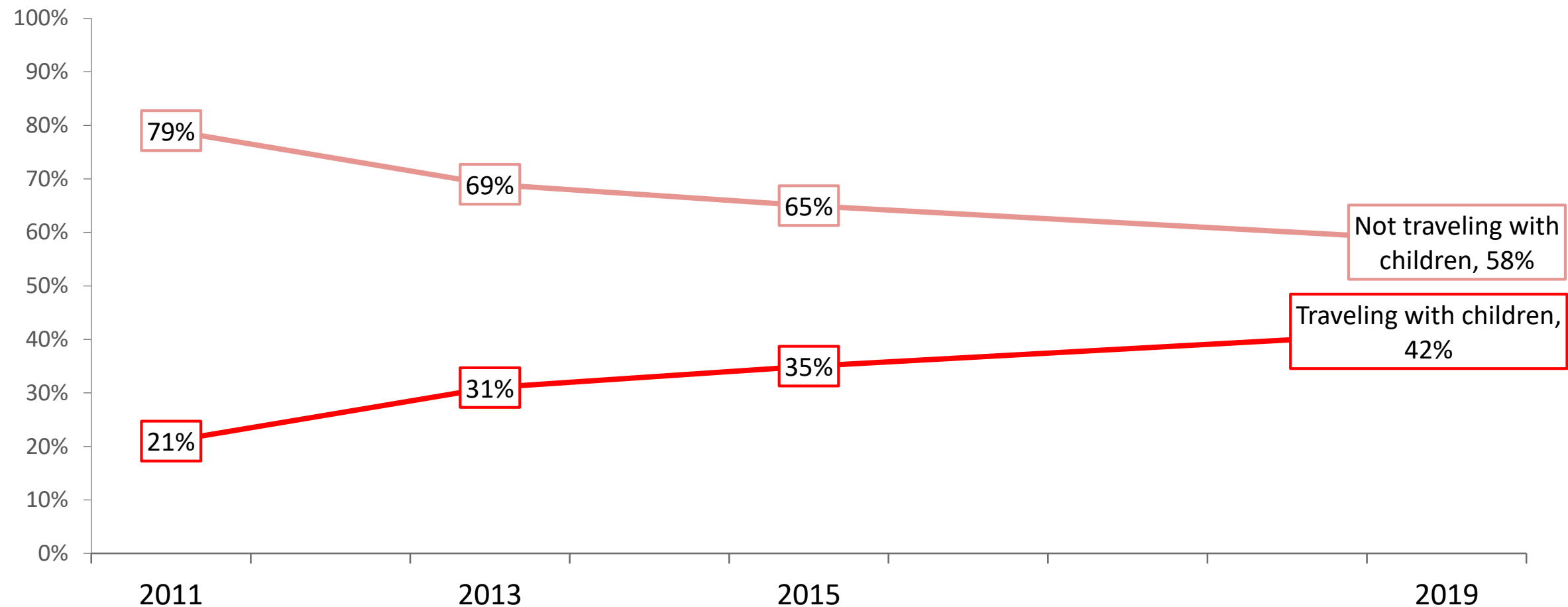
Visitor Age

The average age continues to decrease, with an increase in Millennial visitors.



Visitors Traveling with Children

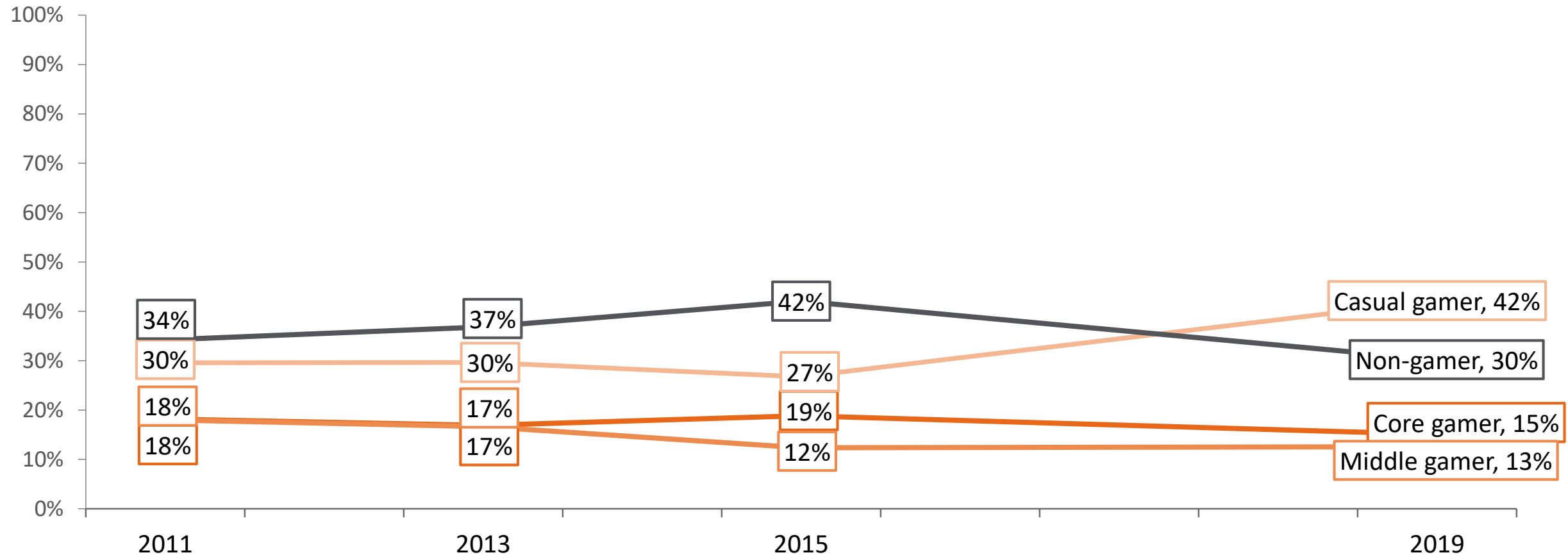
More Reno visitors are traveling with children than in previous years.



The definition of “Traveling with children” is those who had someone in their party under 21, and they are either over 30 or report having children.

Gaming

There are more casual gamers and fewer non-gamers overall, though the amount of core and middle gamers remains relatively similar over the years.



Core Gamer: Gamer + either rated gaming as extremely important and spent more than \$200 on gaming, stayed overnight in a gaming hotel and spent more than \$250 on gaming, or spent more than \$1,000 on gaming.

Middle Gamer: Gamer + not a core gamer and either spent more than \$150 on gaming or stayed in a gaming hotel and spent more than \$100 on gaming.

Casual Gamer: Gamer + not a core or middle gamer and either spent money on gaming or reported participating in gaming.

Visitors by Home State

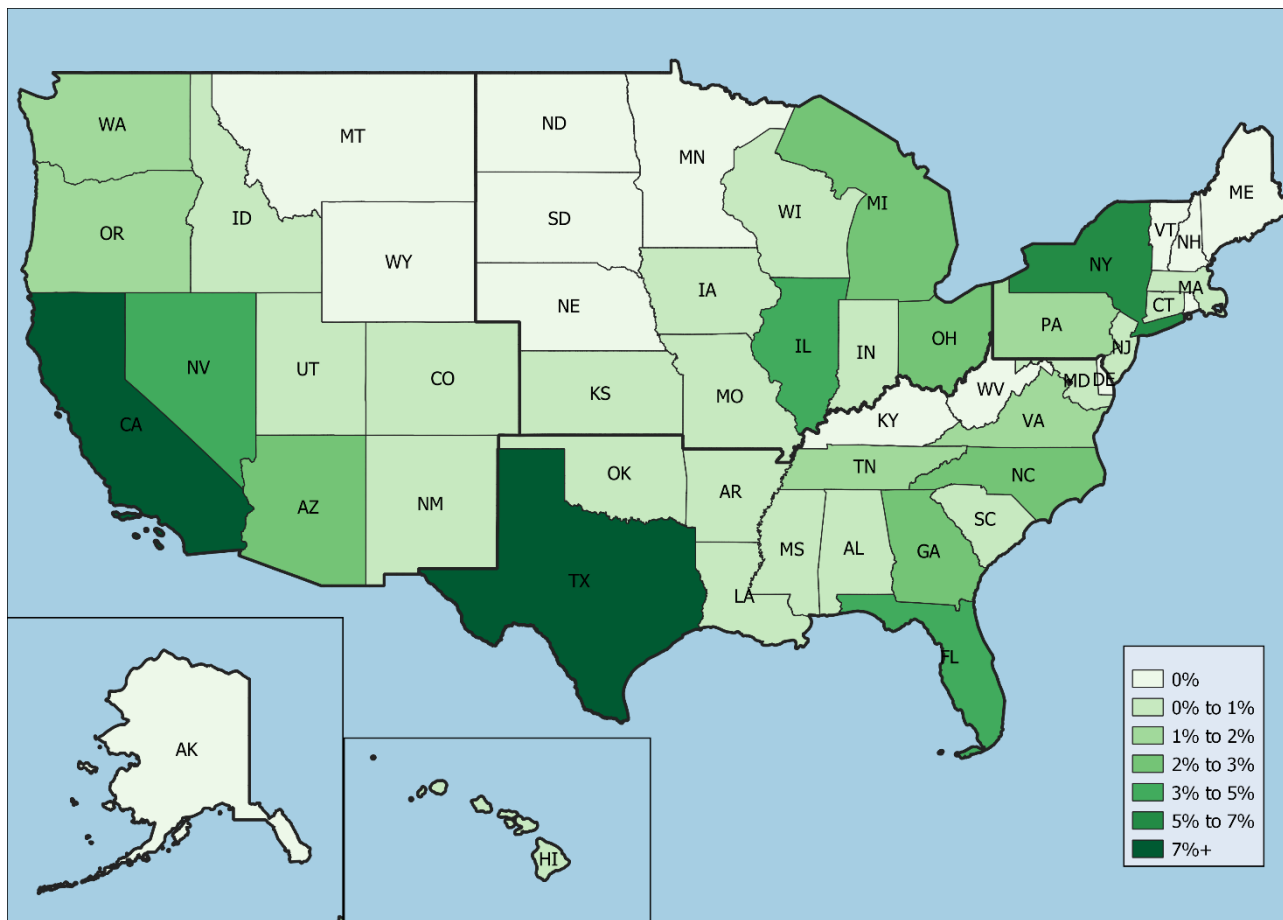
A plurality of visitors to Washoe County are from California.

Visitors by Region

West 44%
South 29%
Midwest 15%
Northeast 12%

Top States by % of Visitors

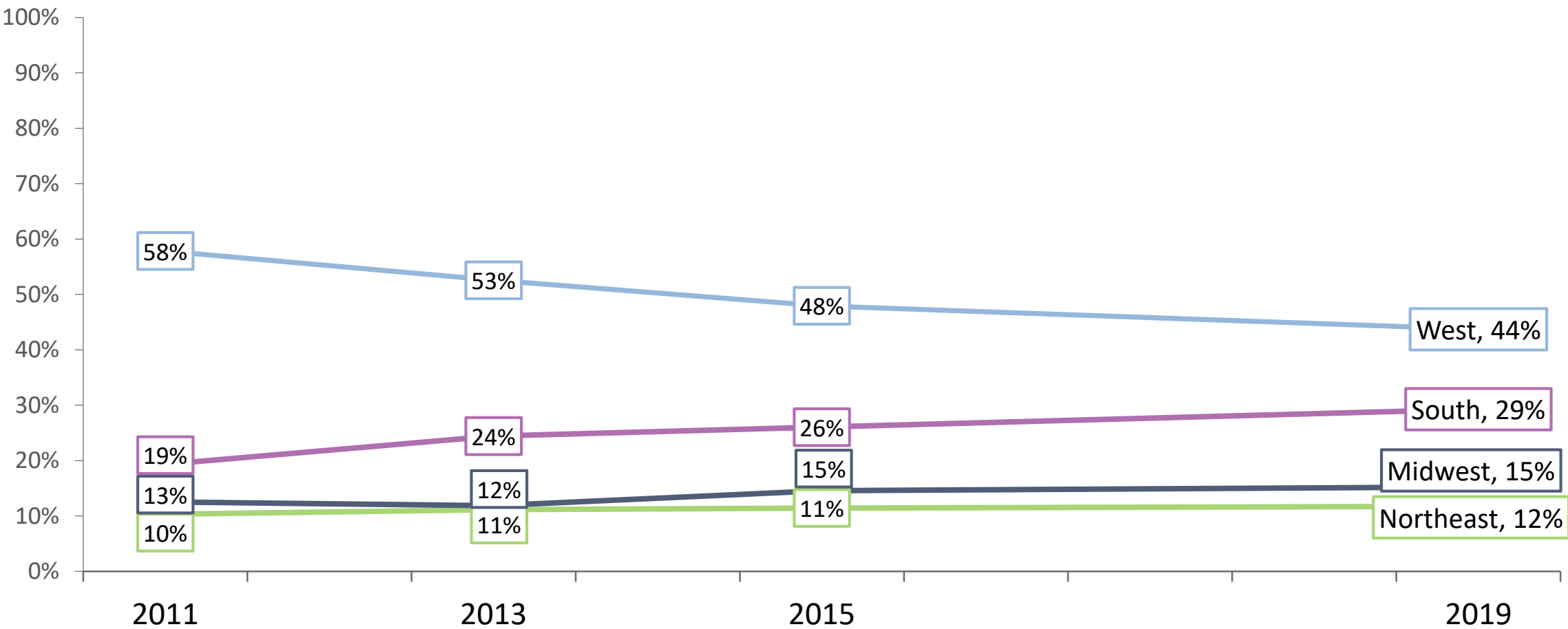
California 27%
Texas 7%
New York 6%
Florida 5%
Illinois 5%
Nevada 4%



Note: Western Region also includes Alberta and British Columbia, Canada

Visitor Origin Over Time

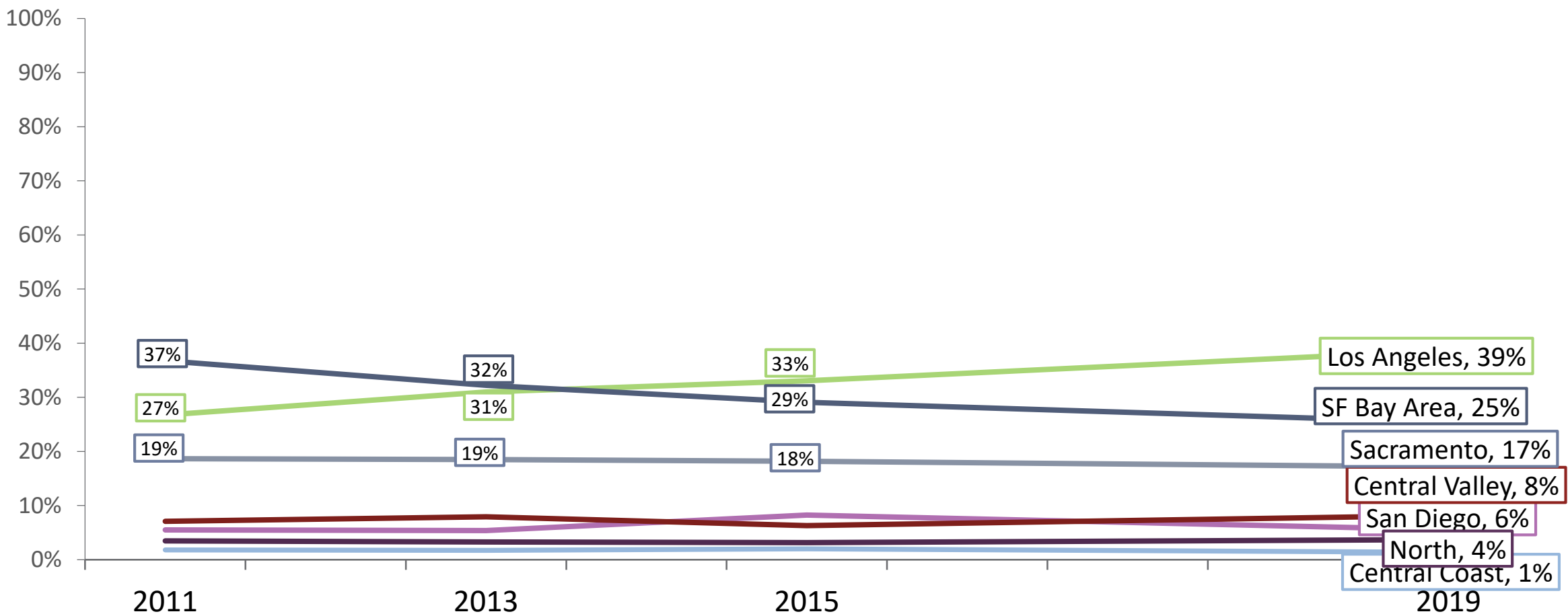
A plurality of visitors continue to be from the Western region of the United States, though that proportion has dropped since 2011 with an increase of visitors from other regions.



QD. What state or province do you live in?
Note: Western Region also includes Alberta and British Columbia, Canada

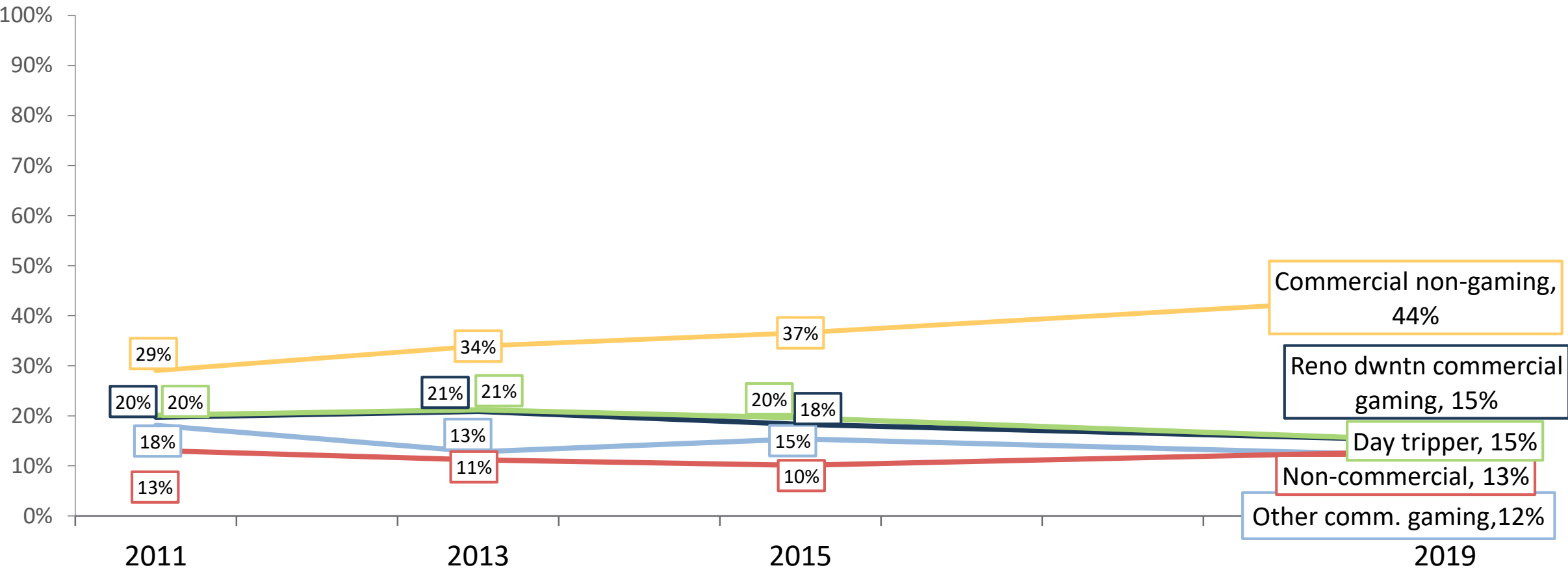
California Visitor Origin Over Time

A plurality of California visitors come from the Los Angeles area, followed by the Bay and Sacramento Areas.



Visitor Lodging

More visitors continue to stay at non-gaming commercial hotels in Reno compared to other lodging options.



Q8. Where were your accommodations during this trip to the Reno area?
“Commercial non-gaming” includes non-gaming hotels, motels, and rentals/timeshares
“Other commercial gaming” includes Reno suburban, Sparks, and Lake Tahoe gaming hotels
“Non-commercial” includes friends/family and other

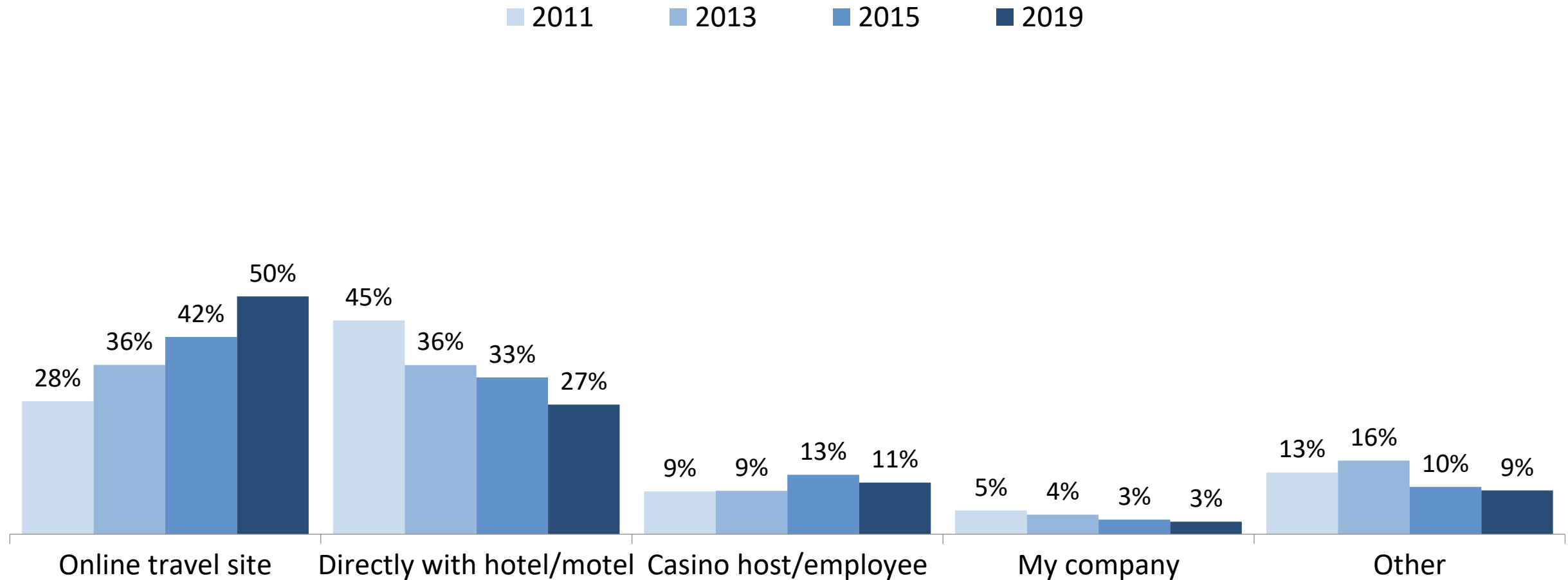
Visitor Origin by Lodging Type

Day trippers are most likely to come from the Sacramento area, while Los Angeles Area residents are most likely to stay in non-gaming commercial properties.

Group	2019 Overall	Commercial non-gaming (44%)	Commercial Reno downtown gaming (15%)	Other commercial gaming (12%)	Non-commercial (family/friends) (13%)	Day tripper (15%)
Northeast	12%	14%	6%	10%	12%	12%
Midwest	15%	17%	17%	8%	11%	17%
South	29%	34%	18%	26%	34%	27%
West	44%	35%	59%	56%	43%	45%
California Visitors						
<i>Los Angeles</i>	39%	53%	32%	26%	42%	28%
<i>SF Bay Area</i>	25%	22%	32%	32%	22%	19%
<i>San Diego</i>	6%	7%	3%	4%	6%	7%
<i>Central Coast</i>	1%	2%	0%	1%	1%	1%
<i>Central Valley</i>	8%	7%	12%	9%	8%	4%
<i>Northern CA</i>	4%	2%	4%	6%	1%	7%
<i>Sacramento</i>	17%	7%	17%	21%	19%	35%

Lodging Reservation

Over time, more and more reservations are made through online travel sites, and fewer directly with the property.

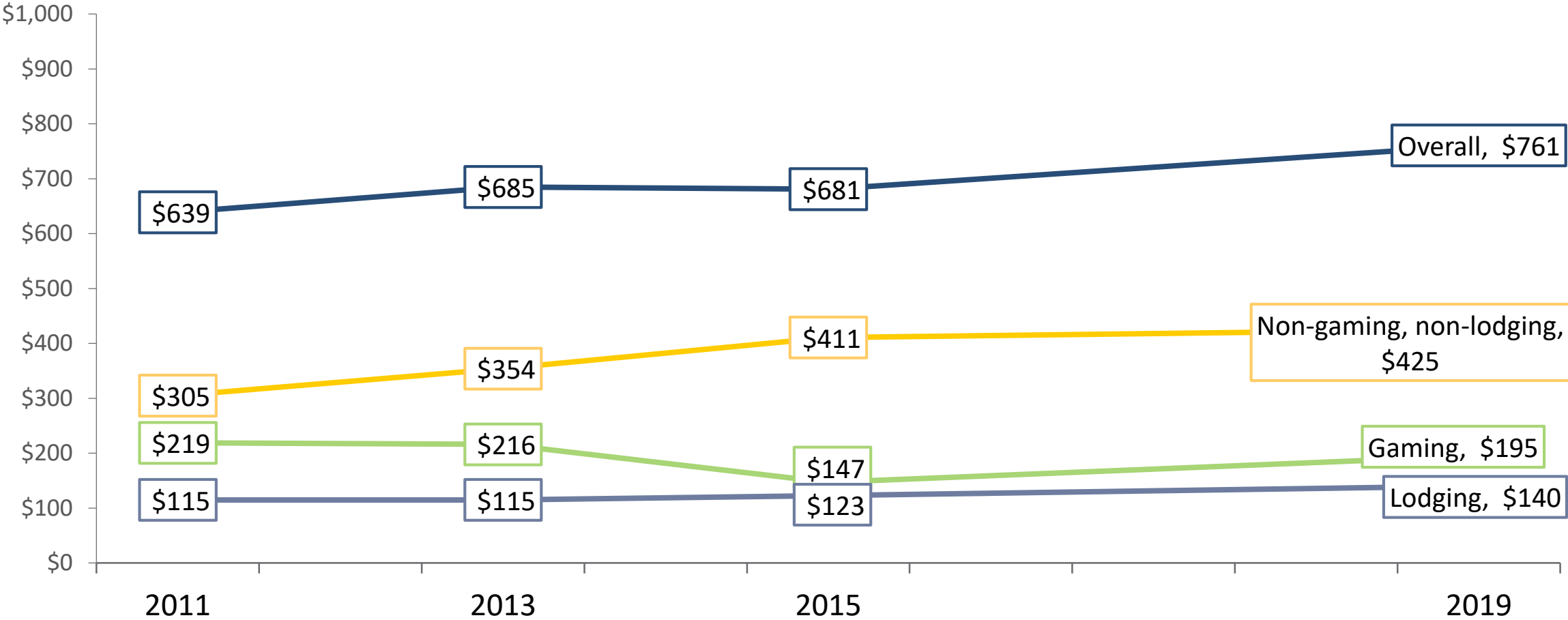




Spend and Activities:
What do visitors do in Reno?

Total Self-Reported Spending

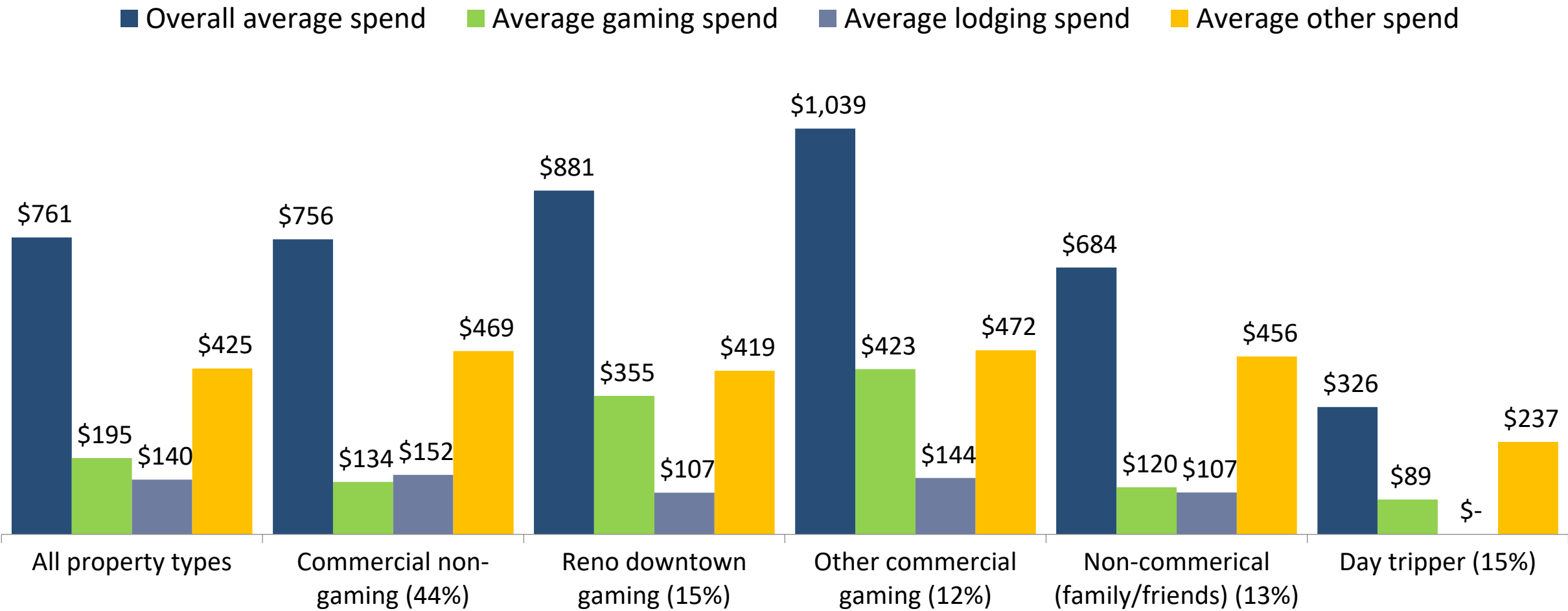
Self-reported spending has risen since 2015, both in the gaming and non-gaming categories.



Q44. 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?

Spending by Lodging Type

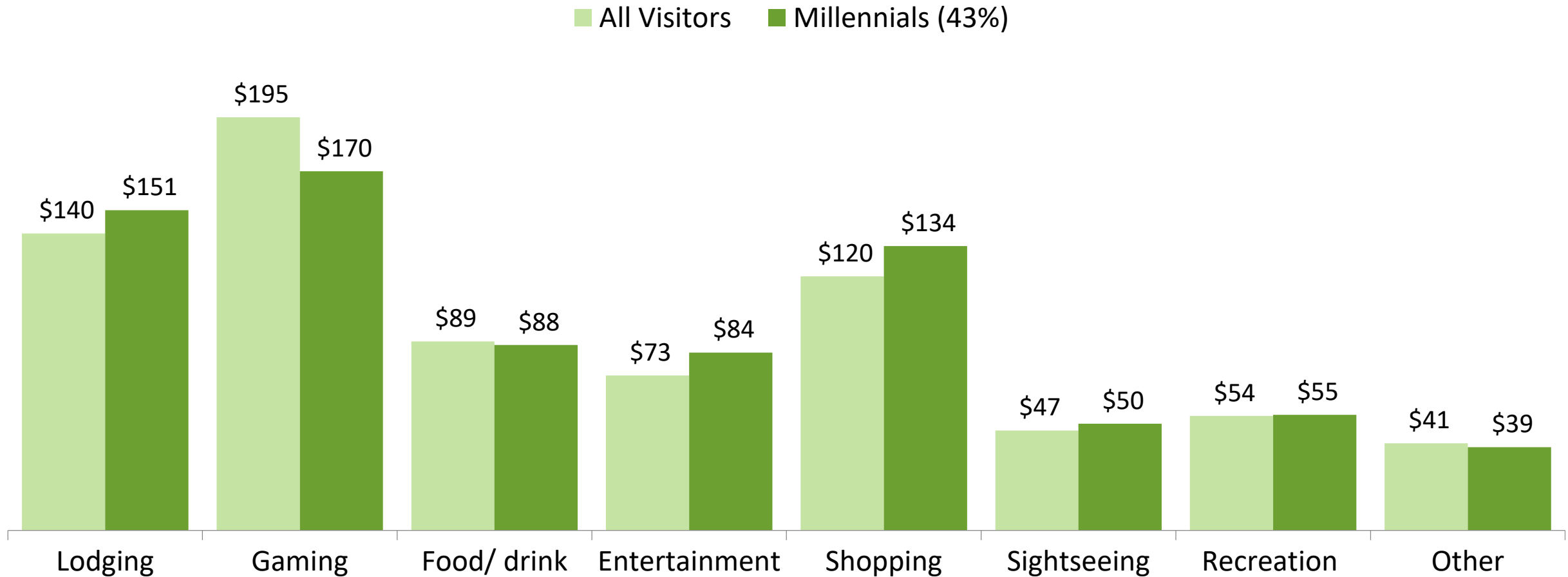
Those staying at gaming hotels report an overall higher spend.



Q44. 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?

Breakout: Millennial Spend

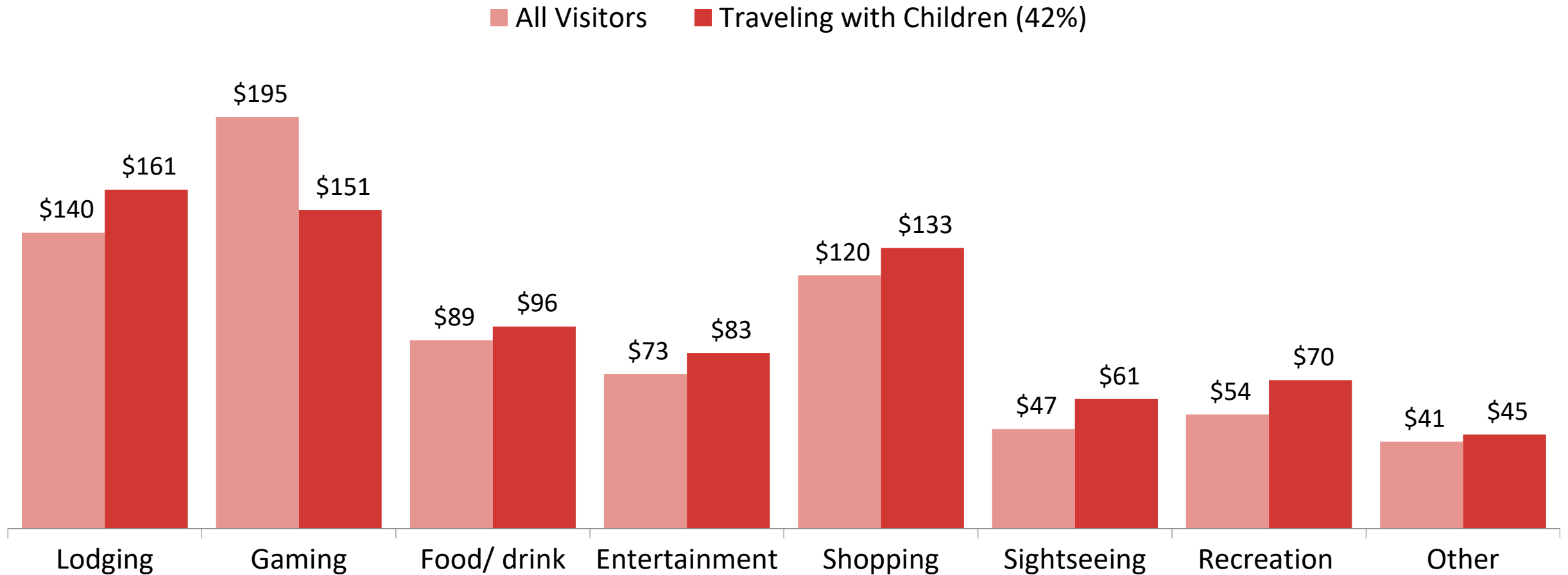
On average, millennials spend more on lodging, shopping, and entertainment, and less on gaming.



Q44. 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?

Breakout: Family Spend

Families spend more on lodging and recreation, and less on gaming.

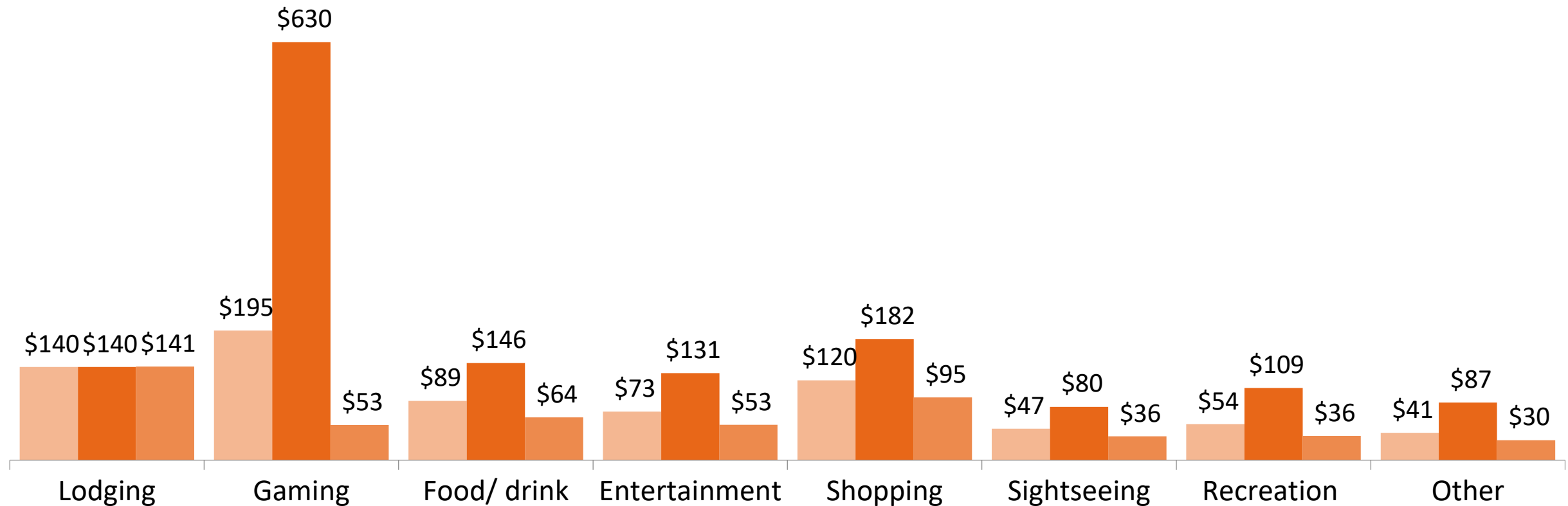


Q44. Thinking about your typical 24-hour day in the Reno area, on average, about how much money did you spend per person, per day for each of the categories below?

Breakout: Gamer Spend

Core and middle gamers spend more in nearly all categories, while casual gamers tend to spend the least.

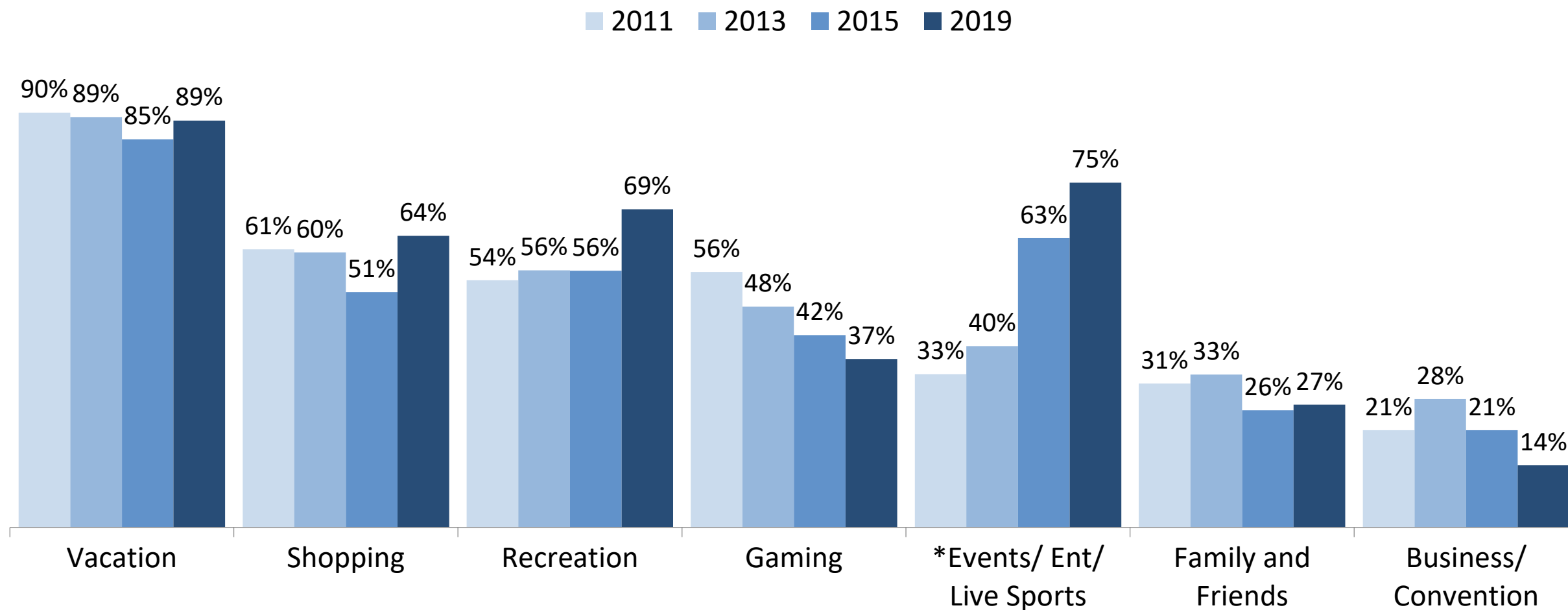
■ All Visitors ■ Core + Middle Gamers (28%) ■ Casual Gamers (42%)



Q44. 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 Participation in Activities

More report attending events, entertainment, and live sports in 2019, as well as shopping and recreation. Self-reported participation in gaming activities continues to decline.



Q22-26. Did you attend/participate in any of the following activities during your most recent trip to the Reno area?

*Questions about attendance at specific events were added starting in 2015

Top 2019 Special Events by Quarter

The Aces, 1868FC, Wine Walks, and Pub Crawls are consistent attractions for visitors.

Special Event	Q1 2019
Reno Wine Walk	10%
Reno Pub Crawl	6%
Reno 1868 FC Soccer Game	5%
Safari Club International (Jan Only)	3%
The Sheep Show (Feb Only)	3%
Rocky Mountain Oyster Fry (Mar Only)	2%

Special Event	Q2 2019
Reno Aces Baseball Game	11%
Reno Wine Walk	10%
Reno Pub Crawl	6%
Reno Rodeo/PRCA Xtreme Bull (June Only)	6%
Reno 1868 FC Soccer Game	5%
The Great Eldorado BBQ, Brews and Blues (June Only)	3%

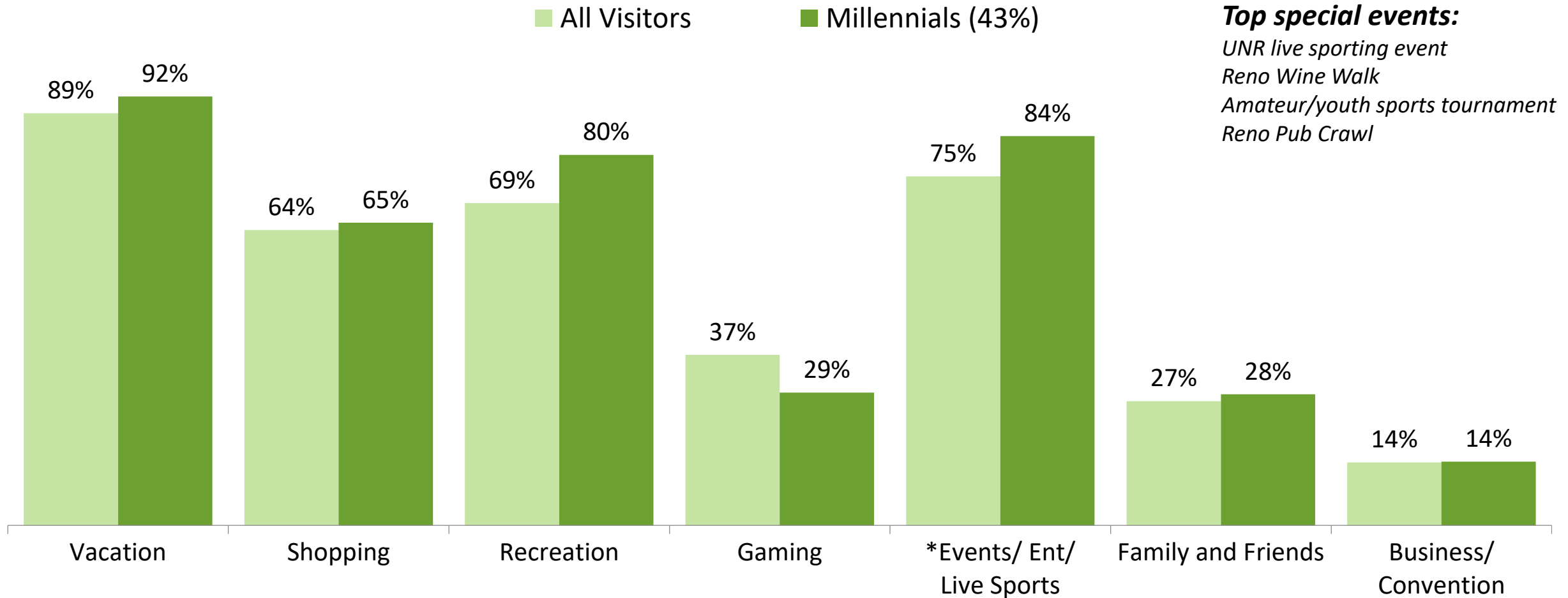
Special Event	Q3 2019
Reno Aces Baseball Game	13%
Reno Wine Walk	7%
Reno 1868 FC Soccer Game	6%
Reno Pub Crawl	5%
Hot August Nights (Aug Only)	3%
Lake Tahoe Shakespeare Festival (Aug Only)	2%

Special Event	Q4 2019
Reno Wine Walk	11%
Reno Pub Crawl	7%
Reno Aces Baseball Game	7%
Reno 1868 FC Soccer Game	5%
Reno Pop Culture Con (Nov Only)	3%
Zombie Crawl (Oct Only)	3%

Q23. Did you attend or participate in any of the following activities during your most recent trip to the Reno area?

Breakout: Millennial Activities

Millennials are more likely to engage in recreation and live entertainment and events.

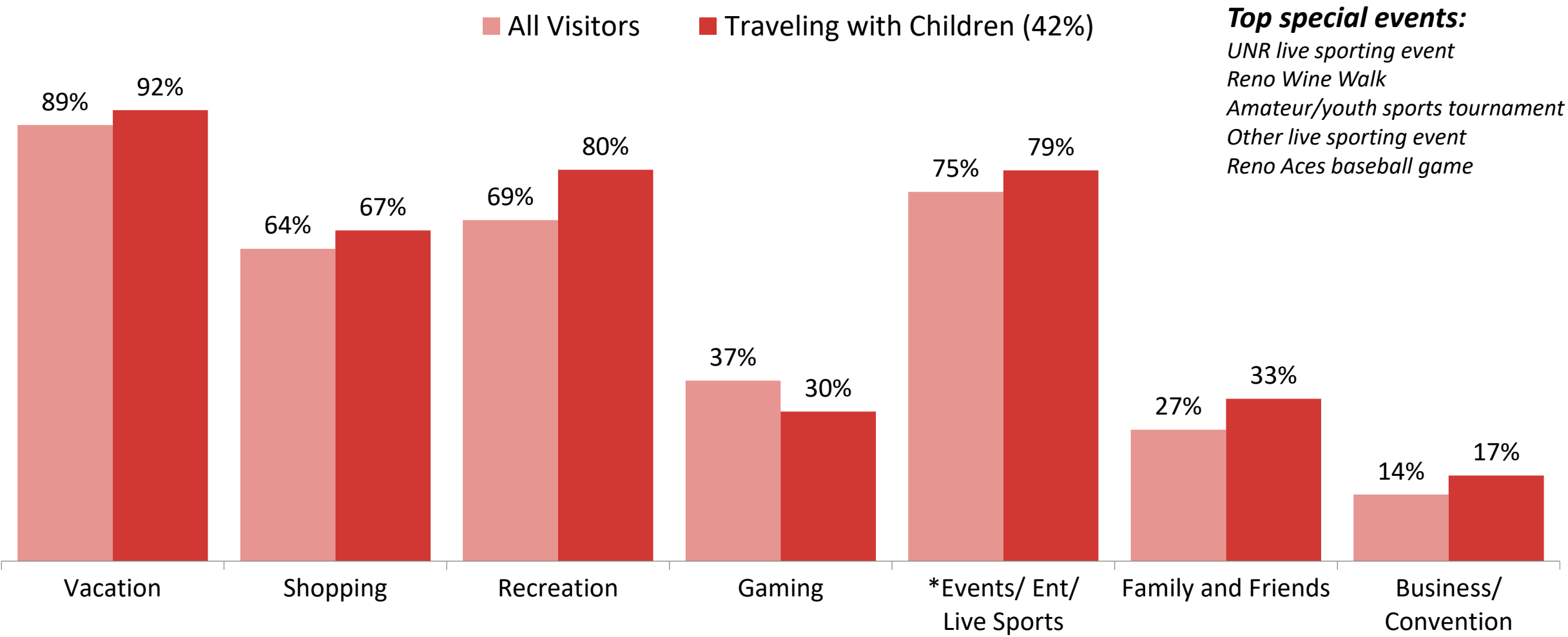


Q22-26. Did you attend/participate in any of the following activities during your most recent trip to the Reno area?

*Events/Ent/Live Sports questioning changed from 2013 to 2015

Breakout: Family Activities

Families visiting Reno tend to participate in more recreation activities.



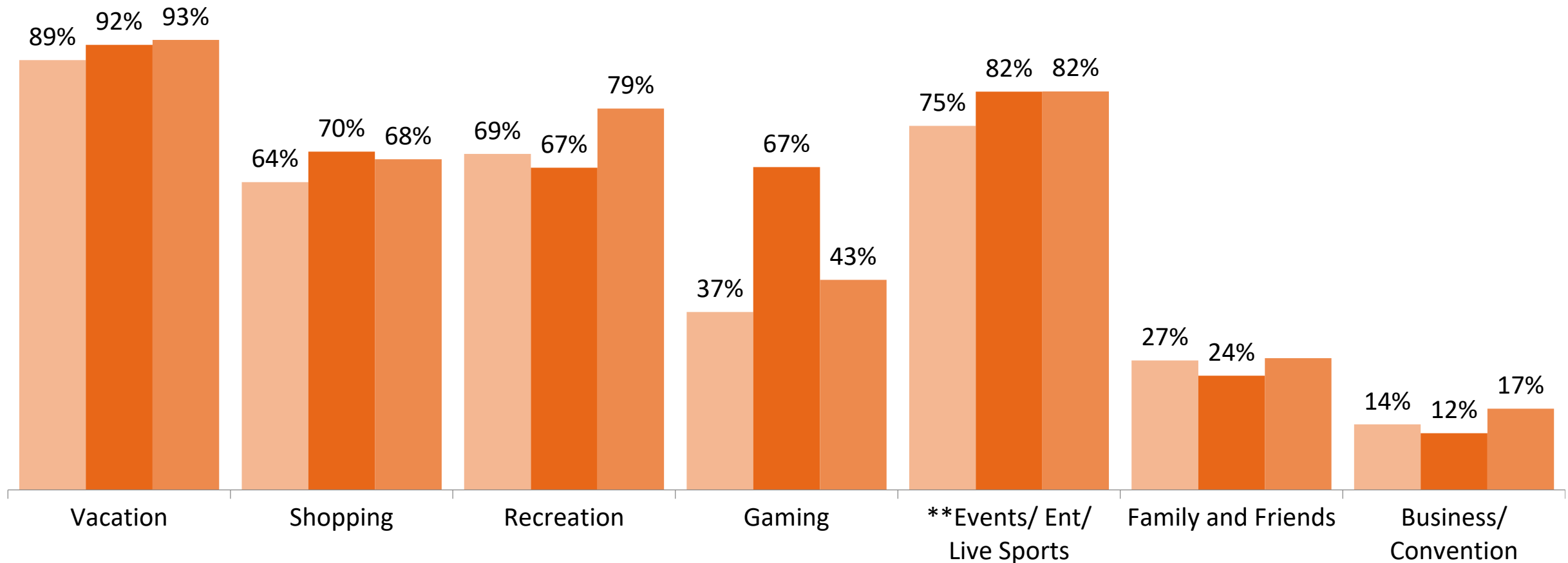
Q22-26. Did you attend/participate in any of the following activities during your most recent trip to the Reno area?

*Events/Ent/Live Sports questioning changed from 2013 to 2015

Participation in Activities Among Gamers

Core gamers participate in activities other than gaming at a similar rate as visitors overall.

■ All Visitors ■ Core + Middle Gamers (28%) ■ Casual Gamers (42%)



Q22-26. Did you attend/participate in any of the following activities during your most recent trip to the Reno area?

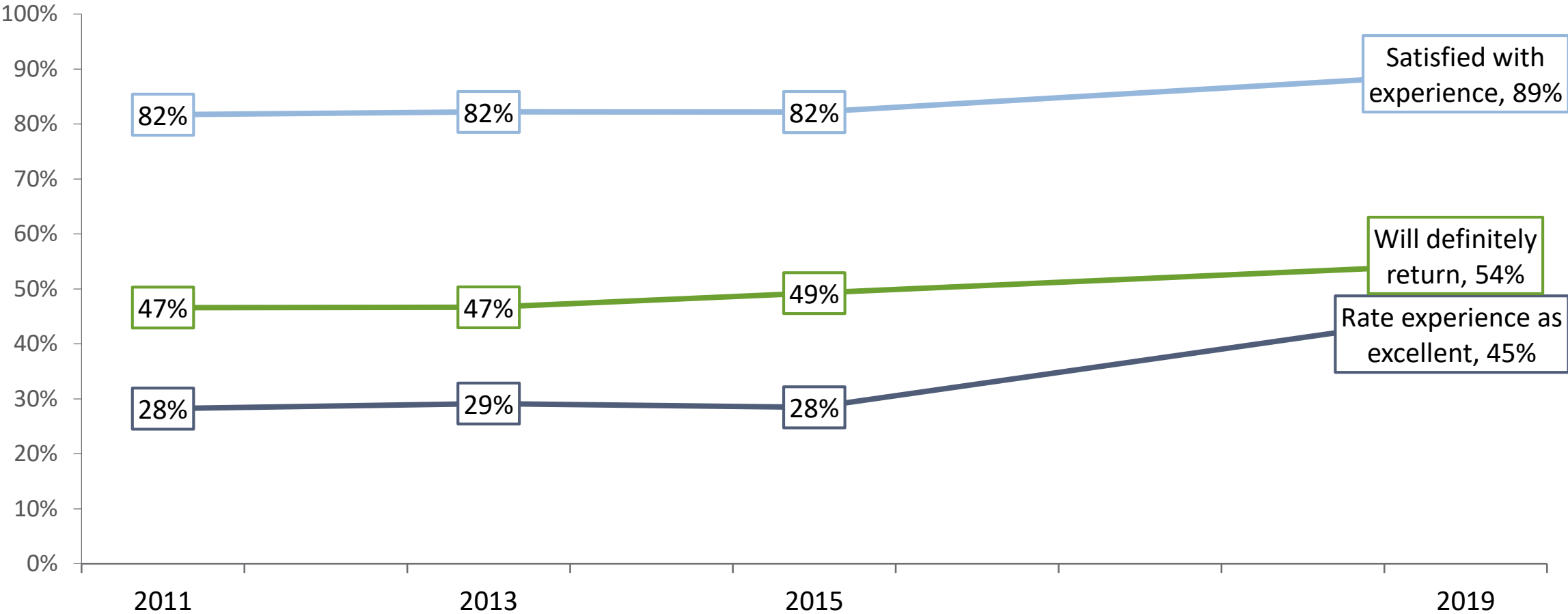
*Questions about attendance at specific events were added starting in 2015



**Visitor Satisfaction and
Intent to Return:**
*Do visitors enjoy Reno and
will they come back?*

Returning to Reno and Experience Rating

Nearly all Reno visitors continue to be satisfied with their visit, and more than half say they will definitely return. The proportion of visitors who rate their experience as excellent has increased significantly.

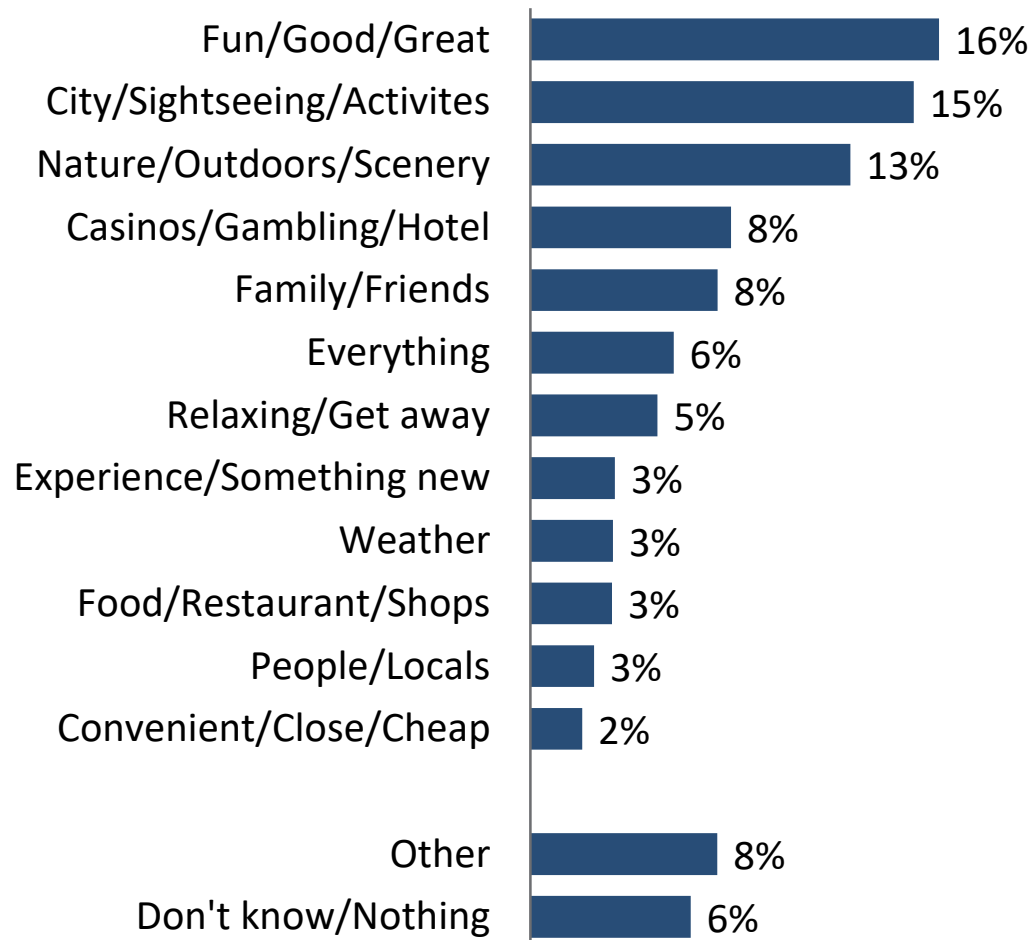


Q45. On the following scale, how would you rate your overall experience on your most recent trip to the Reno area?

Q48. What is the likelihood that you will return to the Reno area in the next two years?

Positive Experiences in Reno

Those who had a positive experience comment that it is a fun location, and about the city, sightseeing and activities offered.



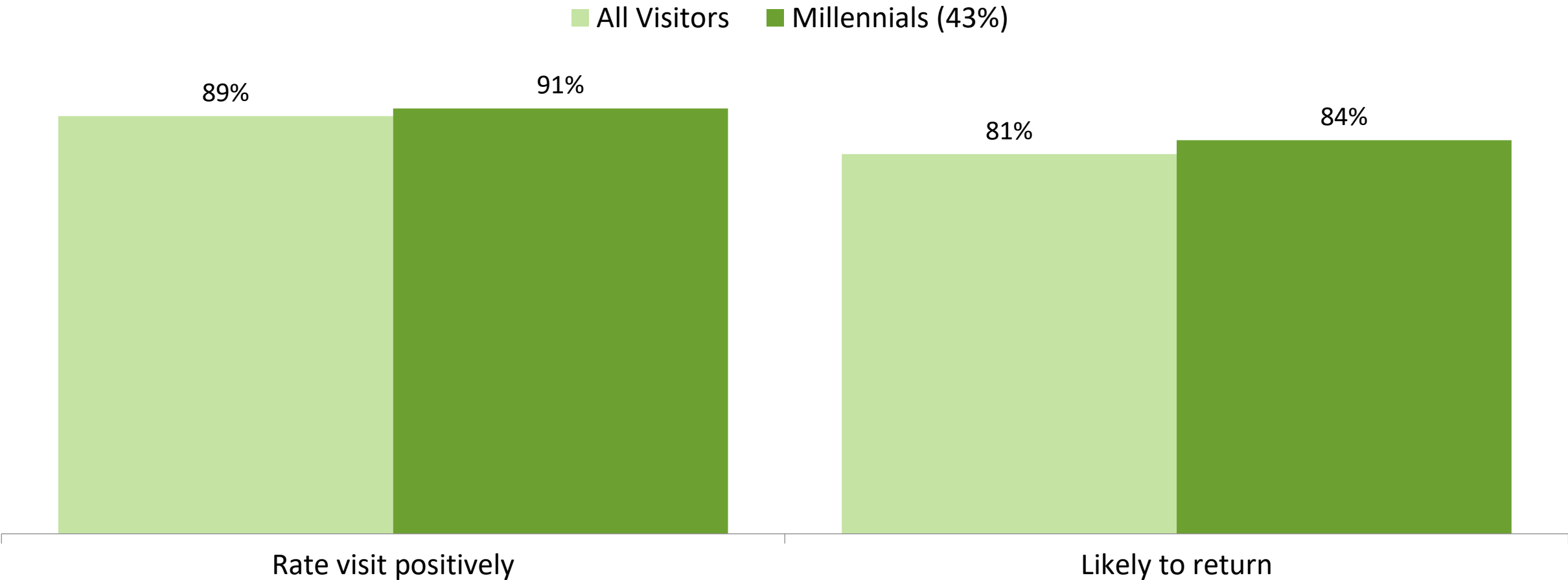
Reason	Percentage
Dislike the area/Nothing to do/Passing Through	13%
Too crowded/Traffic	9%
Casinos/Hotel/Shops	7%
People/Homeless/Dirty/Run down	6%
Long drive/Far away/inconvenient	4%
Weather	3%
Cost	3%
Other	14%
Don't know/Nothing	41%

Word cloud content: expensive, people, dirty place, dislike, bore, drive, work, passing, kind, hot, casino, weather, better, gamble, food, old, tahoe, traffic, hotel, activity, smoke, crowd, experience, walk, work, passing, kind, hot, casino, weather, better, gamble, food, old, tahoe, traffic, hotel, activity, smoke, crowd, experience, walk



Breakout: Millennial Visit Ratings

Millennials have similar ratings and intent to return to Reno as visitors overall.

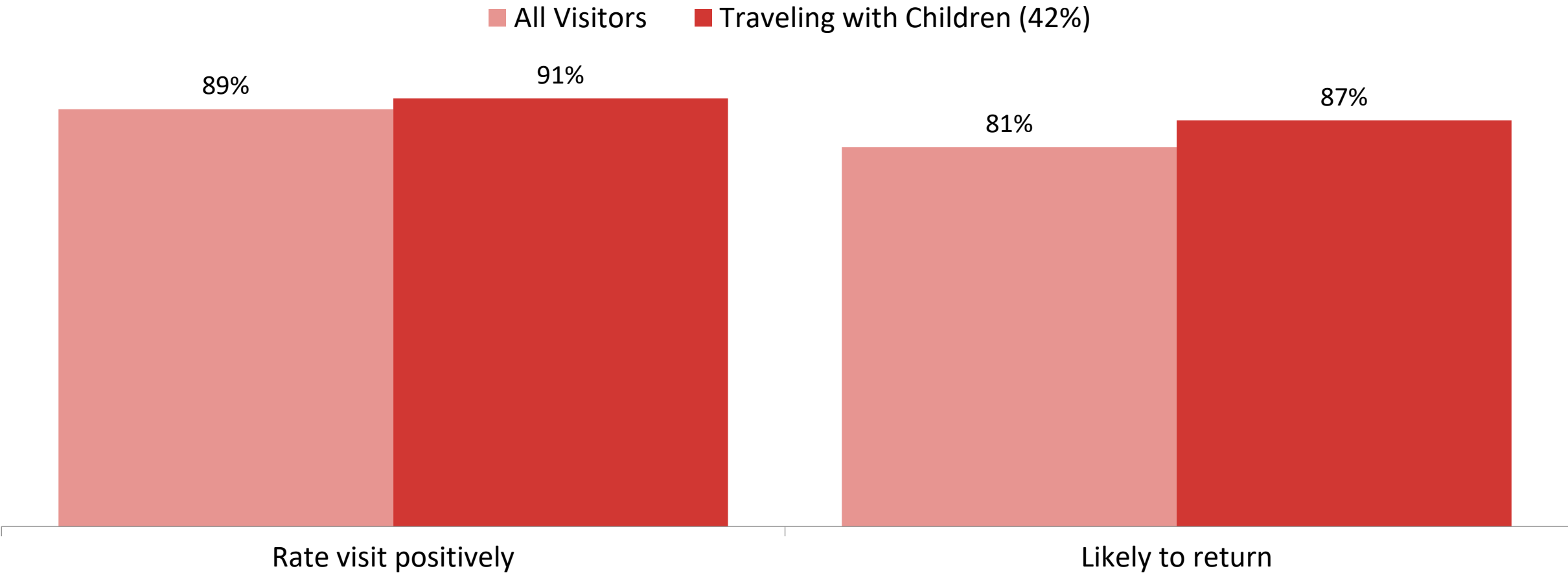


Q45. On the following scale, how would you rate your overall experience on your most recent trip to the Reno area?

Q48. What is the likelihood that you will return to the Reno area in the next two years?

Breakout: Family Visit Ratings

Families also give Reno strong ratings, and nearly all say they are likely to return.

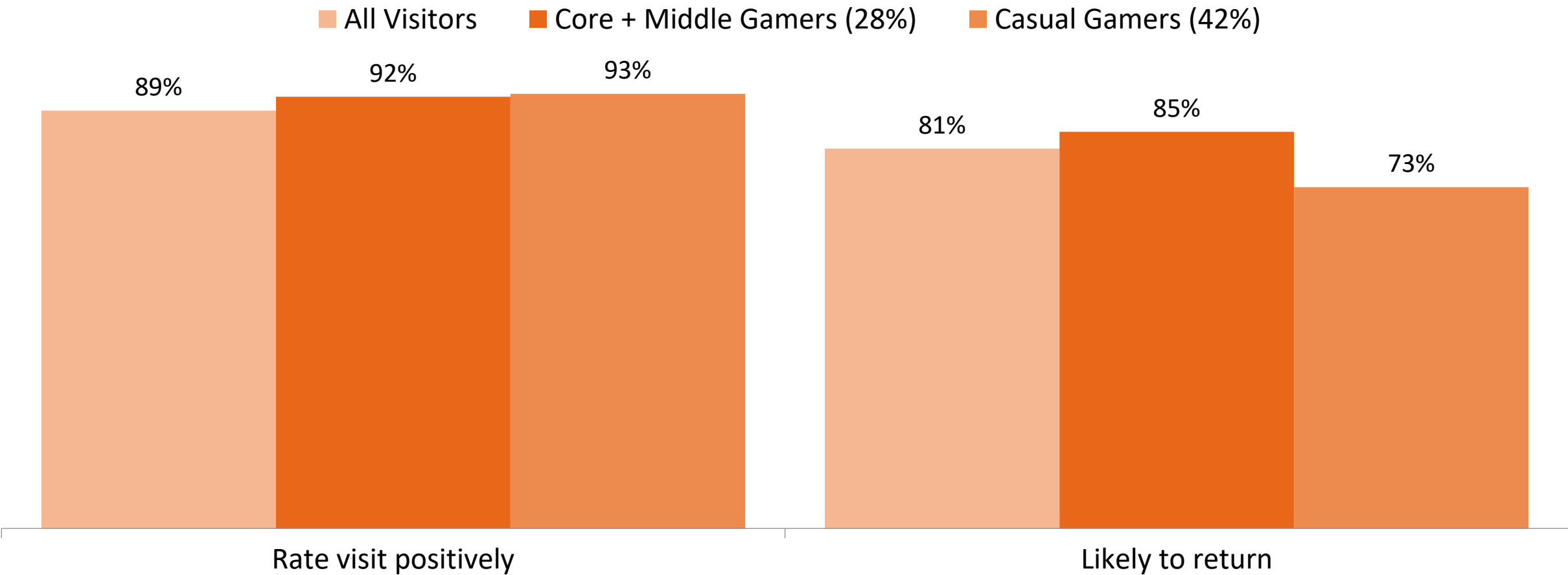


Q45. On the following scale, how would you rate your overall experience on your most recent trip to the Reno area?

Q48. What is the likelihood that you will return to the Reno area in the next two years?

Breakout: Gamer Visit Ratings

Gamers tend to have a more positive experience and are more likely to return to Reno than non-gamers.



Q45. On the following scale, how would you rate your overall experience on your most recent trip to the Reno area?
Q48. What is the likelihood that you will return to the Reno area in the next two years?



Sara LaBatt

sara@emcresearch.com

510.550.8924

Mallory Thayer

mallory@emcresearch.com

614.827.9676

Jonathan Lee

jonathanl@emcresearch.com

510.550.8921