

The Reno-Sparks Convention & Visitors Authority
Washoe County, Nevada

2003 Marketing Report

Mission Statement

To increase overnight visitation

Vision Statement

To be a premier, four-season recreation, resort and meeting destination with the added value of gaming and entertainment.



www.renolaketahoe.com

Reno-Sparks Convention & Visitors Authority

2003 MARKETING REPORT

The Reno-Sparks Convention & Visitors Authority (RSCVA), established in 1959 as the Washoe County Fair and Recreation Board, acts as a marketing organization for the county to promote convention and tourism business. It owns and operates the following facilities.

Reno-Sparks Convention Center
Northgate Golf Club
Reno-Sparks Livestock Events Center
National Bowling Stadium

** (Owned by City of Reno)

Wildcreek Golf Course
Pioneer Center for the Performing Arts
***(Managed by the Reno Performing Arts Center Association.)**

The RSCVA's revenues come primarily from: room license taxes, revenue derived from the operation of the facilities it owns and income from investments. Room license taxes provide the predominant portion of these revenues.

Board of Directors

Phil Salerno

Pete Sferrazza

Bonnie Weber

Mike Murdock

Mary Simmons

David Miller

Glenn Carano

Jackson (Jack) Fisher

Larry Harvey

Bob Cashell

Sharon Zadra

Pete Sears

Tim Maland

Representing

City of Sparks

Washoe County Commission

Washoe County Commission

Financial Industry

General Business

Motel Industry

Gaming Industry

Gaming Industry

Air Service Industry

City of Reno

City of Reno

Incline Village/Crystal Bay

Gaming Industry

2003 Annual Marketing Report

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Washoe County Population & Climate

POPULATION

	2003 Projection	2002 Census	% Change
Washoe County (all)	362,458	357,776	1.31%
Reno	195,727	187,834	4.20%
Sparks	78,435	75,255	4.23%
Incline Village/Crystal Bay	10,641	10,356	2.75%

AVERAGE TEMPERATURES

	Reno/Sparks		Lake Tahoe	
	High	Low	High	Low
Jan	55	31	49	30
Feb	50	25	44	23
Mar	60	33	50	28
Apr	57	34	45	27
May	75	46	62	36
Jun	88	55	73	43
Jul	97	62	80	49
Aug	90	58	77	50
Sep	86	51	75	46
Oct	76	43	68	41
Nov	52	30	45	28
Dec	56	29	50	25

Reno averages 1937 to 2003 (66 years), Lake Tahoe averages 1948 to 2003 (55 years),

Visitor Count

ESTIMATED VISITORS

	2003	2002	% Change
In Commercial Accommodations	4,670,866	4,718,262	-1.0%
Not in Commercial Accommodations*	194,619	196,592	-1.0%
Total Est. Washoe County Visitors	4,865,485	4,914,854	-1.0%

*Visiting friends & relatives, daytrippers, campers, etc.

ALL WASHOE COUNTY

Month	2003	2002	% Change
Jan	347,947	336,325	3%
Feb	354,545	370,683	-4%
Mar	398,343	407,667	-2%
Apr	370,365	415,236	-11%
May	408,953	409,735	0%
Jun	445,681	428,659	4%
Jul	471,764	472,611	0%
Aug	492,689	497,946	-1%
Sep	457,940	464,211	-1%
Oct	435,478	417,051	4%
Nov	347,647	353,944	-2%
Dec	334,133	340,786	-2%
Total	4,865,485	4,914,854	-1%

VISITORS' PRIMARY MODES OF TRANSPORTATION

Mode of Transportation	2003		2002		% Change
	Percent Each Mode*	Projected Visitors	Percent Each Mode	Projected Visitors	
Auto/RV/Truck	61%	2,967,946	71%	3,499,376	-15%
Air	29%	1,410,991	21%	1,007,545	40%
Train	1%	48,655	2%	83,552	16%
Motor-coach	8%	389,239	7%	324,381	20%
Total	100%	4,865,485	100%	4,914,854	-1%

*These percentages represent what visitors stated as their "primary" modes of transportation to the area in the 2003 Visitor Profile Study. Various inter-modal combinations may have been used, e.g. air/auto, train/bus, etc.

ECONOMIC IMPACT

	2003	2002	% Chg	2001	2000
1 Number of visitors to Washoe County	4,865,485	4,914,854	-1.00%	5,008,504	5,188,325
2 Non-Gaming Trip Budgets per person*	\$331	\$315	5.08%	\$296	\$296
3 Non-Gaming Impact-Direct (1x2)	\$1,610,475,535	\$1,548,179,010	4.02%	\$1,482,517,184	\$1,535,744,200
4 Economic Multiplier	1.77	1.77		1.77	1.77
5 Non-Gaming Impact-Indirect (6-3)	\$1,240,066,162	\$1,192,097,838	4.02%	\$1,141,538,232	\$1,182,523,034
6 Non-Gaming Impacts-Total (3x4)	\$2,850,541,697	\$2,740,276,848	-1.00%	\$2,624,055,416	\$2,718,267,234
7 Washoe County Total Gaming Win	\$1,010,452,000	\$1,034,789,000	-2.35%	\$1,080,732,131	\$1,140,598,865
8 Discount for Local Gaming	15%	15%		15%	15%
9 Visitor-Related Gaming Win (7-8)	\$858,884,000	\$879,570,650	-2.35%	\$918,622,311	\$969,509,035
10 Economic Multiplier	1.98	1.98		1.98	1.98
11 Gaming Impact-Indirect (12-9)	\$841,707,000	\$861,979,237	-2.35%	\$900,249,865	\$950,118,855
12 Gaming Impact-Total (9x10)	\$1,700,591,000	\$1,741,549,887	-2.35%	\$1,818,872,176	\$1,919,627,890
13 Direct Economic Effects (3+9)	\$1,611,334,419	\$1,549,058,581	4.02%	\$2,401,139,495	\$2,505,253,235
14 Indirect Economic Effects (5+11)	\$1,240,907,868	\$1,192,959,817	4.02%	\$2,041,788,097	\$2,132,641,889
TOTAL ECONOMIC IMPACTS (6+12)	\$2,852,242,288	\$2,742,018,398	4.02%	\$4,442,927,592	\$4,637,895,124

* Daily non-gaming budgets for 2001 and 2002 were derived from the 1999 Visitor Profile Study while budgets for 2002 and 2003 were obtained from the Visitor Profile Studies conducted for each respective year.

VISITOR RESEARCH
Summary of the Reno-Sparks Visitor Profile Study

	2003 n=2645	2002 n=2558	1999 n=2,523	1998 n=2,512	1997 n=2,535	1996 n=2,540	1995 n=2,570	1994 n=2,551	1993 n=2,507
Satisfaction:									
Intend to return to Reno-Sparks (75-100% chance within 2 yrs)	76%	83%	83%	82%	84%	86%	86%	84%	81%
Trip Characteristics:									
Day visitor	4%	4%	12%	11%	10%	12%	12%	9%	10%
Overnight visitors-commercial accom.	96%	96%	84%	85%	86%	84%	83%	86%	82%
Overnight visitors- friends/relatives/other	4%	4%	4%	4%	4%	4%	5%	5%	8%
Visiting primarily on business	9%	6%	7%	7%	n/a	8%	n/a	7%	5%
Visiting for convention/meeting	15%	13%	9%	7%	10%	5%	8%	7%	6%
First time visitors	22%	15%	18%	18%	20%	19%	16%	17%	16%
Avg. visits per year (First time visitors)	5	4.8	4.1	3.9	4.3	3.8	4.0	4.0	3.0
Avg. members in party	3	3.3	2.7	2.7	2.8	2.6	2.6	2.6	2.7
Traveling with persons under 21	13%	19%	9%	8%	9%	8%	8%	10%	11%
Average length of stay (nights):									
Day & overnight visitors	3	2.4	2.4	2.5	2.5	2.4	2.5	2.6	2.9
Overnight visitors only	3.1	2.5	2.8	2.8	2.8	2.7	2.9	2.9	3.2
Mean Daily Budget (per person)*:									
Gaming	\$210	\$212	\$182	\$163	\$159	\$199	\$174	\$175	\$154
Non-Gaming	\$105	\$131	\$104	\$95	\$87	\$86	\$92	\$94	\$95
Total	\$315	\$343	\$286	\$258	\$246	\$285	\$266	\$269	\$249
Other Visitor Characteristics:									
Median age (years)	56	53	54	55	54	54	51	51	50
Median family income (000)	\$63.6	\$59.6	\$56.5	\$52.3	\$51.3	\$53.4	\$47.5	\$47.6	\$43.9
Male	44%	46%	47%	49%	45%	43%	48%	46%	48%
Female	56%	54%	53%	51%	55%	57%	52%	54%	52%
Residence of Visitors									
Top U.S. Markets:									
1. California	44%	59%	51%	50%	50%	48%	47%	47%	45%
2. Washington	7%	9%	10%	10%	10%	11%	12%	13%	12%
3. Oregon	7%	7%	7%	7%	7%	9%	7%	8%	9%
4. Nevada	2%	2%	4%	4%	4%	5%	5%	4%	6%
5. Texas	3%	2%	3%	2%	2%	2%	2%	2%	3%
California Breakdown:									
Greater San Francisco Bay Area	16%	26%	21%	20%	21%	20%	19%	20%	18%
Central Valley	13%	17%	15%	14%	14%	14%	2%	12%	10%
Southern California	5%	6%	6%	7%	6%	7%	7%	6%	9%
Foreign Visitors:									
Canada	4%	4%	5%	5%	7%	8%	7%	9%	9%
All other countries	0%	1%	1%	1%	1%	1%	1%	1%	2%

*Includes non participants.

NOTE: All calculations are based on the total sample.

The complete 2003 Reno-Sparks Visitor Profile Study may be viewed on the rscva.com web-site.

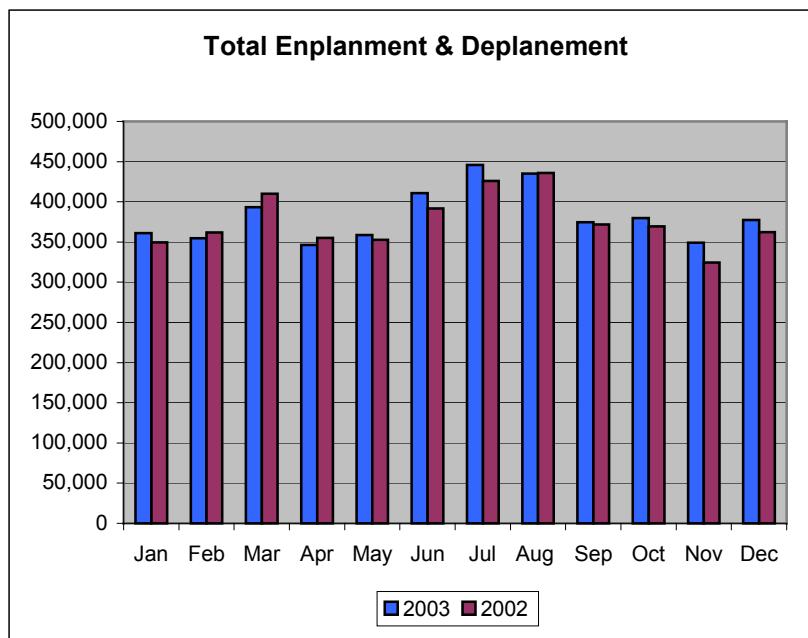
Printed copies are available for \$30.00 each. See the Acknowledgements page for contact information

Note: For consistency, total number of visitors are estimated using 1999 factors.

AIRPORT

**RENO/TAHOE INTERNATIONAL AIRPORT
TOTAL ENPLANEMENTS & DEPLANEMENTS
SCHEDULED & NONSCHEDULED FLIGHTS**

Month	2003	2002	% Chg
Jan	361,259	349,650	3.3%
Feb	354,881	361,980	-2.0%
Mar	393,118	409,842	-4.1%
Apr	346,195	354,924	-2.5%
May	358,615	352,766	1.7%
Jun	410,666	391,753	4.8%
Jul	445,829	426,135	4.6%
Aug	435,006	435,856	-0.2%
Sep	374,473	371,711	0.7%
Oct	379,620	369,302	2.8%
Nov	348,947	324,378	7.6%
Dec	377,418	362,108	4.2%
Total	4,586,027	4,510,405	1.7%



AIRPORT

**DEPLANEMENTS
SCHEDULED FLIGHTS**

Month	2003	2002	% Change
Jan	179,276	170,413	5.2%
Feb	174,349	182,176	-4.3%
Mar	191,561	199,419	-3.9%
Apr	170,441	176,209	-3.3%
May	177,531	177,714	-0.1%
Jun	202,177	195,284	3.5%
Jul	223,179	214,662	4.0%
Aug	214,851	218,529	-1.7%
Sep	182,198	183,870	-0.9%
Oct	184,522	181,749	1.5%
Nov	172,431	161,644	6.7%
Dec	195,143	187,050	4.3%
Total	2,267,659	2,248,719	0.8%

**DEPLANEMENTS
CHARTER/NONSCHEDULED
FLIGHTS**

Month	2003	2002	% Change
Jan	468	1,076	-56.5%
Feb	986	487	102.5%
Mar	903	805	12.2%
Apr	1,825	1,030	77.2%
May	1,707	974	75.3%
Jun	1,642	850	93.2%
Jul	2,099	925	126.9%
Aug	2,422	989	144.9%
Sep	1,197	834	43.5%
Oct	2,242	1,035	116.6%
Nov	2,322	924	151.3%
Dec	1,885	717	162.9%
Total	19,698	10,646	85.0%

**TOTAL DEPLANEMENTS
SCHEDULED & CHARTER FLIGHTS**

Month	2003	2002	% Change
Jan	179,744	171,489	4.8%
Feb	175,335	182,663	-4.0%
Mar	192,464	200,224	-3.9%
Apr	172,266	177,239	-2.8%
May	179,238	178,688	0.3%
Jun	203,819	196,134	3.9%
Jul	225,278	215,587	4.5%
Aug	217,273	219,518	-1.0%
Sep	183,395	184,704	-0.7%
Oct	186,764	182,784	2.2%
Nov	174,753	162,568	7.5%
Dec	197,028	187,767	4.9%
Total	2,287,357	2,259,365	1.2%

AIRPORT**DEPLANEMENTS-BY AIRLINES**

CARRIER	2003	2002	% CHANGE
ALASKA	148,615	112,115	32.6%
ALLEGIAN	18,831	663	2740.3%
AMERICA WEST	201,931	175,814	14.9%
ALOHA	15,219	N/A	N/A
AMERICAN	197,810	293,072	1.0%
CONTINENTAL	71,616	48,681	47.1%
FRONTIER	44,084	45,508	-3.1%
MESA	Closed	2,619	N/A
NATIONAL	Closed	6,138	N/A
NORTHWEST	86,901	82,084	59%
SKYWEST	91,945	103,160	-10.9%
SOUTHWEST	1,148,185	1,110,897	3.4%
UNITED	261,353	256,992	1.7%
TOTAL SCHEDULED DEPLANEMENTS	2,286,490	2,237,743	2.2%

AIR PASSENGER DISTRIBUTION

	2003		2002		YTY Change	% Change
	% Passengers	Total Passengers	% Passengers	Total Passengers		
RESIDENTS	20.7%	468,362	25.1%	564,428	-96,067	-17.0%
VISITORS	79.3%	1,799,297	74.9%	1,684,291	115,007	6.8%
VISITOR DISTRIBUTION:						
RENO/SPARKS	74.3%	1,337,539	66.0%	1,111,217	226,322	20.4%
CARSON CITY	1.4%	25,328	2.6%	43,663	-18,334	-42.0%
NO. LAKE TAHOE	7.3%	131,513	6.9%	115,706	15,807	13.7%
SOUTH LAKE TAHOE	13.3%	238,672	15.6%	261,976	-23,304	-8.9%
GARDNERVILLE/MINDEN	1.0%	18,509	0.6%	10,916	7,594	69.6%
LOYALTON/PORTOLA/SUSANVILLE	0.9%	15,587	1.8%	30,564	-14,977	-49.0%
FERNLEY/FALLON	0.8%	13,638	0.9%	15,282	-1,644	-10.8%
OUT OF AREA	1.0%	18,509	5.6%	94,966	-76,457	-80.5%
TOTAL	100.0%	1,799,297	100.0%	1,684,291	115,007	6.8%

This information is derived from Marketec Reports

HIGHWAY

AVERAGE DAILY TRAFFIC

(Two-Way)

Month	I-80 W (Verdi)			US 395 S (No. of Carson City)			US 395 N (Bordertown)		
	2003	2002	% Chg	2003	2002	% Chg	2003	2002	% Chg
Jan	25,291	24,035	5.2%	31,099	29,681	4.8%	7,304	6,714	8.8%
Feb	26,142	27,586	-5.2%	32,946	32,107	2.6%	7,641	7,946	-3.8%
Mar	26,038	25,923	0.4%	33,335	32,471	2.7%	8,133	8,071	0.8%
Apr	72,428	27,753	161.0%	33,579	33,264	0.9%	8,214	8,878	-7.5%
May	29,510	30,195	-2.3%	34,821	33,969	2.5%	9,663	9,631	0.3%
Jun	33,018	32,441	1.8%	37,702	36,086	4.5%	10,821	10,730	0.8%
Jul	34,930	34,907	0.1%	37,739	36,428	3.6%	11,382	11,409	-0.2%
Aug	37,015	36,908	0.3%	39,218	38,024	3.1%	11,480	11,268	1.9%
Sep	32,057	32,063	0.0%	37,640	36,043	4.4%	10,249	9,984	2.7%
Oct	29,169	29,139	0.1%	35,829	34,563	3.7%	9,693	9,544	1.6%
Nov	25,274	26,171	-3.4%	32,610	31,822	2.5%	8,169	8,497	-3.9%
Dec	24,660	23,403	5.4%	N/A	30,014	-100.0%	7,647	7,433	2.9%
Average	34,560	30,095	14.8%	35,391	34,264	3.3%	9,458	9,418	0.4%
Total	395,532	350,524	12.8%	386,518	404,472	-4.4%	110,396	110,105	0.3%

December 03 US 395 (No. of Carson City)=site has been removed due to the "US-395 Carson-Bypass" construction project. Average is calculated for the 1st 10 months.

INBOUND HIGHWAY TRAFFIC

Month	I-80 W (Verdi)			US 395 S (No. of Carson City)			US 395 N (Bordertown)		
	2003	2002	% Chg	2003	2002	% Chg	2003	2002	% Chg
Jan	782,607	538,725	45.3%	971,710	925,237	5.0%	212,579	220,880	-3.8%
Feb	731,988	636,901	14.9%	712,797	898,985	-20.7%	213,946	222,480	-3.8%
Mar	812,022	744,695	9.0%	1,023,130	1,000,372	2.3%	252,351	251,986	0.1%
Apr	756,173	825,434	-8.4%	1,010,206	999,571	1.1%	242,684	265,023	-8.4%
May	917,789	931,914	-1.5%	1,046,977	1,063,173	-1.5%	300,830	298,760	0.7%
Jun	992,427	982,685	1.0%	1,123,163	1,071,600	4.8%	324,985	323,269	0.5%
Jul	1,074,015	1,068,968	0.5%	1,035,504	1,100,709	-5.9%	350,499	350,863	-0.1%
Aug	1,164,693	1,152,992	1.0%	1,210,739	1,184,243	2.2%	348,771	351,678	-0.8%
Sep	955,535	968,224	-1.3%	1,127,082	1,071,911	5.1%	306,006	299,943	2.0%
Oct	900,641	892,300	0.9%	1,003,218	1,077,626	-6.9%	300,454	294,156	2.1%
Nov	727,706	792,020	-8.1%	N/A	956,040	N/A	245,187	256,546	-4.4%
Dec	760,789	724,974	4.9%	N/A	924,476	N/A	236,588	229,912	2.9%
Average	908,789	874,284	3.9%	1,026,453*	1,039,343*	-1.2%	285,311	287,904	-0.9%
Total	10,576,385	10,259,832	3.1%	10,264,526*	10,393,427*	-1.2%	3,334,880	3,365,496	-0.9%

December 03 US 395 (No. of Carson City)=site has been removed due to the "US-395 Carson-Bypass" construction project.

* Calculated for first 10 months (Jan-Oct).

TRAIN

AMTRAK CALIFORNIA ZEPHYR

Arrivals at Reno & Sparks

Month	2003	2002	%Chg
Jan	4,256	4,701	-9.5%
Feb	4,428	4,653	-4.8%
Mar	3,931	3,874	1.5%
Apr	2,504	2,188	14.4%
May	2,142	1,439	48.9%
Jun	1,893	1,482	27.7%
Jul	1,815	1,775	2.3%
Aug	1,948	1,839	5.9%
Sep	1,678	1,547	8.5%
Oct	1,987	1,683	18.1%
Nov	2,582	1,840	40.3%
Dec	3,064	2,807	9.2%
Total	32,228	29,828	8.0%

AMTRAK CALIFORNIA ZEPHYR

On/Off passengers eastbound & westbound at Reno & Sparks

Month	2003	2002	% Chg
Jan	7,684	8,076	-4.9%
Feb	7,483	8,204	-8.8%
Mar	6,661	6,506	2.4%
Apr	4,675	3,893	20.1%
May	4,177	2,820	48.1%
Jun	3,532	2,725	29.6%
Jul	3,421	3,286	4.1%
Aug	3,594	3,213	11.9%
Sep	3,286	2,529	29.9%
Oct	4,163	2,798	48.8%
Nov	4,707	3,542	32.9%
Dec	5,864	5,314	10.4%
Total	59,247	52,906	12.0%

OCCUPANCY

Hotel Occupancy All of Washoe County

Month	2003	2002	Point Change
Jan	64.8%	65.3%	-0.5
Feb	71.8%	77.4%	-5.6
Mar	72.9%	76.1%	-3.2
Apr	72.1%	78.6%	-6.5
May	77.0%	74.7%	2.3
Jun	83.0%	78.0%	5.0
Jul	83.3%	82.3%	1.0
Aug	85.3%	82.9%	2.4
Sep	80.0%	81.9%	-1.9
Oct	77.8%	75.4%	2.4
Nov	65.6%	67.3%	-1.7
Dec	61.7%	60.5%	1.2
Average	74.4%	75.0%	-0.4

Motel Occupancy All of Washoe County

Month	2003	2002	Point Change
Jan	45.3%	40.2%	5.1
Feb	49.4%	48.7%	0.7
Mar	48.5%	46.2%	2.3
Apr	48.2%	53.0%	-4.8
May	54.2%	50.9%	3.3
Jun	58.9%	54.6%	4.3
Jul	60.0%	57.8%	2.2
Aug	63.1%	62.3%	0.8
Sep	59.8%	59.9%	-0.1
Oct	55.5%	51.9%	3.6
Nov	46.5%	45.8%	0.7
Dec	45.3%	44.3%	1.0
Average	52.9%	51.3%	1.6

28 DAY OCCUPANCY All of Washoe County

Month	2003	2002	Point Change
Jan	71.3%	77.3%	-6.0
Feb	70.7%	77.4%	-6.7
Mar	74.0%	76.2%	-2.2
Apr	74.6%	75.7%	-1.1
May	75.7%	77.6%	-1.9
Jun	73.5%	81.9%	-8.4
Jul	76.1%	79.5%	-3.4
Aug	77.0%	81.0%	-4.0
Sep	77.7%	77.9%	-0.2
Oct	77.0%	72.8%	4.2
Nov	76.0%	70.3%	5.7
Dec	73.7%	69.0%	4.7
Average	74.3%	76.4%	-2.1

TOTAL HOTEL/MOTEL/28 DAY OCCUPANCY All of Washoe County

Month	2003	2002	Point Change
Jan	62.1%	62.1%	0.0
Feb	67.4%	71.6%	-4.2
Mar	67.7%	70.3%	-2.6
Apr	68.0%	73.1%	-5.1
May	71.5%	70.4%	1.1
Jun	77.3%	74.3%	3.0
Jul	77.5%	76.8%	0.7
Aug	79.2%	80.2%	-1.0
Sep	76.0%	76.6%	-0.6
Oct	73.7%	70.2%	3.5
Nov	63.9%	63.5%	0.4
Dec	59.2%	59.1%	0.1
Average	70.3%	70.7%	-0.4

Room/Unit Utilization by Visitors for 2003 - All Washoe County

Month	Hotel Room Nights		Motel Room Nights		28 Day Room Nights		Total Room Nights	
	Available	Occupied	Available	Occupied	Available	Occupied	Available	Occupied
Jan	488,434	316,549	147,994	66,595	140,806	99,256	777,234	482,400
Feb	444,738	319,200	134,409	66,719	124,324	88,532	703,471	474,451
Mar	497,842	362,973	144,119	68,176	133,455	94,094	775,416	525,243
Apr	473,772	341,769	141,000	67,410	119,520	90,159	734,292	499,338
May	488,310	370,299	144,553	78,322	132,246	98,148	765,109	546,769
Jun	483,180	401,077	139,890	82,547	128,640	97,199	751,710	580,823
Jul	488,310	406,588	145,886	86,964	133,362	101,450	767,558	595,002
Aug	488,310	416,768	145,483	91,807	136,691	101,750	770,484	610,325
Sep	487,320	389,998	135,060	80,814	130,780	101,584	753,160	572,396
Oct	492,588	383,309	136,710	75,904	133,114	102,504	762,412	561,717
Nov	477,912	313,594	134,490	62,486	124,350	94,383	736,752	470,463
Dec	501,996	298,520	142,104	63,175	135,253	99,615	779,353	461,310
Total	5,812,712	4,320,644	1,691,698	890,919	1,572,541	1,168,674	9,076,951	6,380,237

Month	RV Park Unit Nights		Condos/Timeshares Unit Nights		Total Room/Unit Nights All-Types	
	Available	Occupied	Available	Occupied	Available	Occupied
Jan	38,905	19,971	33,480	11,632	72,385	31,603
Feb	35,140	18,858	30,240	12,042	65,380	30,900
Mar	38,905	24,231	33,480	12,612	72,385	36,843
Apr	37,650	24,761	32,400	9,841	70,050	34,602
May	38,905	28,830	33,604	9,961	72,509	38,791
Jun	37,650	30,482	34,560	12,612	72,210	43,094
Jul	38,905	29,916	38,936	18,261	77,841	48,177
Aug	39,065	32,847	39,494	18,787	78,559	51,634
Sep	41,400	32,518	37,770	14,454	79,170	46,972
Oct	38,905	30,482	35,154	11,565	74,059	42,047
Nov	37,650	22,727	33,420	8,979	71,070	31,706
Dec	38,905	20,607	36,332	11,803	75,237	32,410
Total	461,985	316,230	418,870	152,549	880,855	468,779

NUMBER OF ROOMS

NUMBER OF LICENSED ROOMS/UNITS BY TYPE & LOCATION As of Dec 31, 2003

Type of Property	City of Reno	City of Sparks	Balance of County (Unincorporated)		Total Rooms	No. of Licensees
			N. Tahoe	Other*		
Hotels	12,396	2,200	716	0	15,312	24
Motels/Limited Service	3,604	794	61	161	4,620	77
RV Parks	844	256	0	155	1,255	13
Condos/Timeshares	260	161	783	8	1,212	17
28-Day Rentals (all types)	3,948	349	0	120	4,417	205
Total	21,052	3,760	1,560	444	26,816	236

* All properties in the "Other" unincorporated area lie outside the Reno city limits.

ROOM TAX, RATES, REVENUES

GROSS ROOM TAX DISTRIBUTION BY GEOGRAPHIC AREA (\$000)

	Total 2003	Total 2002	% Change
1% Nevada Lodging Tax			
5/8% RSCVA Portion	1,595	1,617	-1.4%
3/8% State Portion	957	970	-1.3%
1% National Bowling Stadium Tax	2,561	2,594	1.3%
Railroad Project	965	971	-0.6%
6% RSCVA Dedicated Tax	15,319	15,518	-1.3%
Convention Center Expansion	5,106	5,173	-1.3%
1% Local Government Tax	2,252	2,279	-1.2%
City Center Development	3,085	3,136	-1.6%
2.5% Sparks Redevelopment	406	0	N/A
Total Collections CY 2003	32,246	32,258	0.0%
Prior Year Collections	32,258	33,162	
% Change From Prior Year	0.0%	-2.7%	

GROSS ROOM TAX COLLECTIONS

Month	2003	2002	%Chg
Jan	2,054,059	1,978,659	3.7%
Feb	2,244,380	2,495,625	-11.2%
Mar	2,434,632	2,568,614	-5.5%
Apr	2,326,258	2,632,691	-13.2%
May	2,754,461	2,458,049	10.8%
Jun	2,927,661	2,906,568	0.7%
Jul	3,288,834	3,262,508	0.8%
Aug	3,879,017	3,810,491	1.8%
Sep	3,425,168	3,486,498	-1.8%
Oct	2,720,565	2,626,751	3.4%
Nov	2,112,892	2,057,841	2.6%
Dec	2,078,881	1,973,942	5.0%
Total	32,246,808	32,258,237	0.0%

NET RSCVA ROOM TAX REVENUES (6-5/8%)

Month	2003	2002	%Chg
Jan	1,092,831	1,058,209	3.2%
Feb	1,196,286	1,334,011	-11.5%
Mar	1,292,858	1,364,704	-5.6%
Apr	1,233,542	1,397,505	-13.3%
May	1,454,760	1,302,343	10.5%
Jun	1,550,331	1,535,827	0.9%
Jul	1,713,199	1,738,219	-1.5%
Aug	2,012,288	2,022,683	-0.5%
Sep	1,779,717	1,848,171	-3.8%
Oct	1,410,509	1,390,163	1.4%
Nov	1,097,826	1,090,311	0.7%
Dec	1,080,349	1,053,134	2.5%
Total	16,914,496	17,135,280	-1.3%

CASH OCCUPIED ROOM NIGHTS

All Washoe County

The following represents occupied room nights for which room tax was collected. It does not include the following which are not taxable: complimentary rooms, rooms occupied for more than 28 consecutive nights, timeshares owners/traders or occupancy in non-licensed properties.

Type	2003	2002	% Change
Hotels	3,493,412	3,542,358	-1.4%
Motels/Limited Service	629,473	648,599	-3.0%
RV Parks	99,601	112,513	-13.0%
Condos/Timeshares	114,966	128,134	-11.5%
28 Day Properties	165,793	162,829	1.8%
Total	4,503,245	4,594,433	-2.0%

TAXABLE ROOM REVENUES

(\$000)

Month	2003	2002	% Change
Jan	16,486	15,979	3.1%
Feb	18,106	20,094	-11.0%
Mar	19,239	20,235	-5.2%
Apr	18,305	21,020	-14.8%
May	21,999	19,775	10.1%
Jun	23,384	21,869	6.5%
Jul	25,529	26,319	-3.1%
Aug	30,210	30,624	-1.4%
Sep	26,917	27,921	-3.7%
Oct	21,254	20,756	2.3%
Nov	16,693	16,467	1.4%
Dec	15,967	15,904	0.4%
Total	254,089	256,963	-1.1%

Reported gross revenues adjusted for comps and other non taxable rentals.

AVERAGE DAILY ROOM RATE

(ADR)

	2003	2002	% Change
Washoe County*	\$58.93	\$58.52	0.7%
National Average**	\$83.13	\$83.70	-0.7%

*This is the cash room rate. Complimentary rooms are excluded from the calculation.

** Received source from Smith's Travel Research Data

GAMING**GAMING WIN
Washoe County (All) (\$000)**

Month	2003	2002	% Change
Jan	81,122	70,193	15.6%
Feb	74,749	77,535	-3.6%
Mar	85,316	85,504	-0.2%
Apr	77,712	87,129	-10.8%
May	93,576	92,903	0.7%
Jun	85,717	86,772	-1.2%
Jul	90,579	96,001	-5.6%
Aug	99,660	101,427	-1.7%
Sep	86,098	93,431	-7.8%
Oct	89,658	88,849	0.9%
Nov	76,525	82,581	-7.3%
Dec	69,584	72,464	-4.0%
Total	1,010,296	1,034,789	-2.4%

**GAMING WIN
Reno (\$000)**

Month	2003	2002	% Change
Jan	58,758	50,429	16.5%
Feb	54,053	56,209	-3.8%
Mar	62,788	62,816	0.0%
Apr	58,071	64,250	-9.6%
May	70,474	68,178	3.4%
Jun	63,588	63,667	-0.1%
Jul	65,815	69,807	-5.7%
Aug	72,202	74,378	-2.9%
Sep	62,942	67,676	-7.0%
Oct	65,737	65,176	0.9%
Nov	55,464	60,446	-8.2%
Dec	49,651	52,368	-5.2%
Total	739,543	755,400	-2.1%

**GAMING WIN
Sparks (\$000)**

Month	2003	2002	% Change
Jan	12,747	10,836	17.6%
Feb	12,399	12,470	-0.6%
Mar	13,308	13,674	-2.7%
Apr	12,004	13,799	-13.0%
May	13,371	14,583	-8.3%
Jun	12,193	13,356	-8.7%
Jul	13,488	13,595	-0.8%
Aug	15,340	15,025	2.1%
Sep	12,691	14,427	-12.0%
Oct	13,690	13,953	-1.9%
Nov	12,619	13,359	-5.5%
Dec	12,441	12,484	-0.3%
Total	156,291	161,561	-3.3%

**GAMING WIN
North Lake Tahoe (\$000)**

Month	2003	2002	% Change
Jan	3,438	3,791	-9.3%
Feb	2,342	2,776	-15.6%
Mar	2,507	2,780	-9.8%
Apr	1,591	2,562	-37.9%
May	2,408	2,773	-13.2%
Jun	3,211	3,185	0.8%
Jul	4,427	5,205	-14.9%
Aug	4,524	4,323	4.6%
Sep	3,746	3,841	-2.5%
Oct	2,961	2,522	17.4%
Nov	2,627	2,269	15.8%
Dec	2,583	2,404	7.4%
Total	36,365	38,431	-5.4%

COMPARATIVE GAMING PERFORMANCE – U.S.A.

Rank	Market	Revenue (\$ in Millions)
1	Las Vegas Strip, NV	\$4,759,607
2	Atlantic City, NJ	\$4,488,509
3	Chicago Area (IL, IN)	\$1,150,702
4	Tunica, MS	\$1,527,047
5	Gulf Coast, MS	\$1,174,262
6	Reno/Sparks, NV	\$895,991
7	Bossier City/Shreveport, LA	\$781,636
8	Las Vegas Downtown, NV	\$657,981
9	St. Louis Area (IL, MO)	\$733,311

NOTE: Based on publicly disclosed records

NUMBER OF CASINOS IN WASHOE COUNTY

(Non-Restricted Locations*)

Area	2003	2002
Reno	24	24
Sparks	12	11
No. Lake Tahoe	5	4
Balance of County	12	13
Total	53	52

*Locations having 16 or more slot machines only, or table only, or table games and any number of slot machines.

COMPARATIVE GAMING PERFORMANCE - NEVADA

December 2003

County	Major Cities/Areas	Win Slots	Win Games	Total Win	Revenue (\$000)	% of Total Revenue
Clark Co.	Las Vegas, Laughlin	5.6%	14.6%	7.1%	\$7,830,676	81.36%
Washoe Co.	Reno, Sparks, No. Lake Tahoe	5.0%	16.5%	6.1%	\$1,010,453	10.50%
Douglas Co.	So. Lake Tahoe only	5.9%	16.2%	7.7%	\$335,499	3.49%
Elko Co.	Elko, Wendover	5.1%	20.1%	6.0%	\$219,588	2.28%
Carson Valley	Carson City, Douglas Co. (partial)	4.7%	18.3%	5.0%	\$102,912	1.07%
Nye Co.	Pahrump, Tonopah	5.5%	6.8%	5.6%	\$44,713	0.46%
Lyon Co.	Dayton, Yerington	21.0%	21.0%	5.7%	\$26,659	0.28%
Humboldt Co.	Winnemucca	6.0%	21.3%	6.5%	\$17,028	0.18%
Churchill Co.	Fallon	4.8%	26.4%	4.9%	\$17,478	0.18%
White Pine Co.	Ely	3.2%	20.7%	3.3%	\$5,571	0.06%
Bal. Of Counties		6.3%	16.2%	6.4%	\$14,682	0.15%
Nevada-Overall		5.5%	14.8%	6.95%	\$9,625,258	100.00%

REVENUE PER DEVICE PER DAY

DECEMBER 2003

Area	Per Day	Per Day	Total Games & Slots	Number of Devices	
	Per Slots	Per Games		Slots	Games
Reno	\$80	\$860	\$940	17,584	601
Sparks	\$70	\$630	\$700	5,155	96
No. Lake Tahoe	\$60	\$520	\$580	1,145	53
Balance of County	\$70	\$800	\$870	2,389	35
Total Washoe Co.	\$280	\$2,810	\$3,090	26,273	785

CONVENTION SALES

RENO AREA CONVENTIONS HELD

Month	<u>Number Held</u>			<u>Actual Attendance</u>			<u>Actual Room Nights</u>		
	2003	2002	% Change	2003	2002	% Change	2003	2002	% Change
Jan	13	14	-7.14%	21,077	20,080	4.97%	33,857	37,410	-9.50%
Feb	22	34	-35.29%	126,324	18,455	584.50%	223,565	31,903	600.76%
Mar	31	19	63.16%	21,656	10,910	98.50%	22,276	14,311	55.66%
Apr	25	44	-43.18%	14,355	15,988	-10.21%	30,306	33,670	-9.99%
May	35	42	-16.67%	17,943	13,319	34.72%	37,801	21,693	74.25%
Jun	27	27	0.00%	76,846	16,992	352.25%	20,110	41,310	-51.32%
Jul	31	23	34.78%	20,655	16,205	27.46%	42,355	26,963	57.09%
Aug	15	24	-37.50%	7,961	9,362	-14.96%	13,865	13,990	-0.89%
Sep	24	38	-36.84%	11,191	15,664	-28.56%	19,442	26,530	-26.72%
Oct	40	49	-18.37%	28,399	29,544	-3.88%	34,160	22,253	53.51%
Nov	19	23	-17.39%	13,960	11,040	26.45%	26,356	25,222	4.50%
Dec	6	8	-25.00%	2,346	2,440	-3.85%	5,586	6,553	-14.76%
Total	288	345	-16.52%	362,713	179,999	101.51%	509,679	301,808	68.88%

CONVENTIONS BOOKED IN 2003 by RSCVA Sales Staff

	Number Booked	Expected Attendance	Expected Room Nights
2003	18	34,234	65,300
2004	3	10,871	20,735
2005	1	2,011	3,835
2006	15	136,885	36,617
2007	8	179,350	360,907
2008	13	52,150	101,074
Total	58	415,501	588,468
Prior Year	390	543,350	789,202
% Change	-85.13%	-23.53%	-25.44%

RENO-SPARKS CONVENTION CENTER

EVENT USE DAYS

By Area

Month	North	South	East	North	South	Mt.	Other	Total
	Hall	Hall	Hall	Meeting Rooms	Meeting Rooms	Rose Ballroom	Areas	
Jan	4	1	7	2	4	1	1	20
Feb	11	12	16	16	6	7	3	71
Mar	30	4	11	18	1	6	1	71
Apr	21	13	13	15	13	8	7	90
May	7	11	7	17	12	16	7	77
Jun	6	6	6	5	0	4	17	44
Jul	13	9	9	14	10	10	13	78
Aug	14	11	11	21	11	13	11	92
Sep	0	0	0	3	10	5	2	20
Oct	13	8	1	15	22	5	5	69
Nov	16	2	7	11	3	2	0	41
Dec	18	0	7	4	4	0	0	33
Total	153	77	95	141	96	77	67	706
Total Prior Yr.	37	18	10	89	30	10	9	203
% Change	24.18%	23.38%	10.53%	63.12%	31.25%	12.99%	13.43%	28.75%

EVENT USE DAYS

By Type of Event

Month	Conventions/	Public	Misc.	Spectator	Total
	Trade Shows	Shows	Meetings	Events/ Ice Hockey	
JAN	4	7	4	0	15
FEB	12	8	16	0	36
MAR	20	4	17	0	41
APR	6	3	15	6	30
MAY	3	1	20	0	24
JUN	0	14	10	3	27
JUL	3	6	6	0	15
AUG	10	4	7	6	27
SEP	4	10	9	0	23
OCT	6	29	13	0	48
NOV	14	1	4	0	19
DEC	8	1	6	0	15
TOTAL	90	88	127	15	320
TOTAL 2002 *	4	103	190	8	305
DIFFERENCE	86	-15	-63	7	15
% CHANGE	2150.00%	-14.56%	-33.16%	87.50%	4.92%

RENO-SPARKS LIVESTOCK EVENTS CENTER

RENO-SPARKS LIVESTOCK EVENTS CENTER EVENT USE DAYS - BY AREA

Month	Main Arena	Livestock Pavilion	Cutting Arena	Stalls/ Barns	Rodeo Arena	Exhibit Hall
Jan	7	5	0	0	0	10
Feb	7	7	0	0	0	3
Mar	12	11	4	0	4	9
Apr	12	11	0	0	7	7
May	17	21	14	21	1	8
Jun	23	23	23	23	24	23
Jul	19	15	7	14	11	6
Aug	12	9	12	13	14	8
Sep	14	13	9	16	16	14
Oct	17	16	16	11	14	2
Nov	10	10	7	0	0	8
Dec	7	2	0	0	0	6
Total	157	143	92	98	91	104
Prior Year	175	160	131	147	137	149
% Change	-10%	-11%	-30%	-33%	-34%	-30%

RENO-SPARKS LIVESTOCK EVENTS CENTER EVENT USE DAYS - BY TYPE OF EVENT

Month	Equine & Livestock Events	Public Shows	Sporting Events	Misc. Other	Total
Jan	1	3	7	7	18
Feb	3	5	4	0	12
Mar	12	7	3	3	25
Apr	16	9	3	0	28
May	25	6	0	2	33
Jun	24	0	0	0	24
Jul	21	4	4	2	31
Aug	3	10	3	1	17
Sep	16	4	0	2	22
Oct	16	2	0	3	21
Nov	7	6	3	2	18
Dec	2	5	7	1	15
Total	146	61	34	23	264
Prior Year	162	95	20	26	303
% Change	-9.88%	-35.79%	70.00%	-11.54%	-12.87%

NATIONAL BOWLING STADIUM

National Bowling Stadium

Event Use Days - By Area

2003 Month	Bowling Lanes	Concourse Area	Registration Area	Squad Room	Stadium Theater	Stadium Club	Total
Jan	18	3	17	12	6	3	59
Feb	5	6	3	3	14	1	32
Mar	6	2	2	2	10	4	26
Apr	30	0	30	30	6	0	96
May	31	0	31	31	7	1	101
Jun	30	0	30	30	1	0	91
Jul	14	15	14	0	0	2	45
Aug	14	14	14	0	3	1	46
Sep	2	2	2	0	2	2	10
Oct	18	18	18	0	2	0	56
Nov	5	5	5	1	1	1	18
Dec	9	9	9	6	0	2	35
Total	182	74	175	115	52	17	615

WILDCREEK GOLF COURSE
Tournament & Open Play Players

Month	Tournament Players			Open Play Players			Break-Out	2003	2002	% Change				
	2003	2002	% Change	2003	2002	% Change								
Jan	0	0	0.0%	1,165	539	116.1%	Out-of-Town Players: Tournament Players 4,107** Open Play, Winter 895 Open Play, Summer 9,271 Total Out-of-Town 14,273	4,107**	4,569**	-10.1%				
Feb	0	89	-100.0%	987	957	3.1%								
Mar	0	0	0.0%	1,755	1,198	46.5%								
Apr	179	50	258.0%	1,161	1,810	-35.9%								
May	791	892	-11.3%	2,448	1,988	23.1%								
Jun	970	1,457	-33.4%	2,580	2,321	11.2%								
Jul	1,063	845	25.8%	2,211	2,448	-9.7%								
Aug	446	502	-11.2%	2,246	2,541	-11.6%					Local Players: Tournament Players 725 Open Play, Winter 1,613 Open Play, Summer 7,182 Annual Ticket Rounds 8,681 Total Local 18,201	725	806	-10.0%
Sep	697	886	-21.3%	1,945	2,356	-17.4%								
Oct	686	654	4.9%	1,526	1,651	-7.6%								
Nov	0	0	0.0%	581	1,139	-49.0%								
Dec	0	0	0.0%	356	442	-19.5%								
Total	4,832	5,375	-10.1%	18,961	19,390	-2.2%	32,474*	31,244*	3.9%					

*Total player equals tournament players, open players and annual ticket rounds.

** Estimated to be 85% of all tournament players.

NORTHGATE GOLF CLUB
Tournament & Open Play Players

Month	Tournament Players			Open Play Players			Break-Out	2003	2002	% Change				
	2003	2002	% Change	2003	2002	% Change								
Jan	0	0	0.0%	0	236	-100.0%	Out-of-Town Players: Tournament Players 1,536** Open Play, Winter 0 Open Play, Summer 7,015 Total Out-of-Town 8,551	1,536**	2,346**	-34.5%				
Feb	0	0	0.0%	0	431	-100.0%								
Mar	0	0	0.0%	529	501	5.6%								
Apr	19	0	100.0%	597	1,175	-49.2%								
May	124	249	-50.2%	1,602	1,757	-8.8%								
Jun	478	479	-0.2%	1,929	2,169	-11.1%								
Jul	254	554	-54.2%	1,802	2,233	-19.3%					Local Players: Tournament Players 271 Open Play, Winter 0 Open Play, Summer 5,201 Annual Ticket Rounds 4,130 Total Local 9,602	271	414	-12.6%
Aug	488	683	-28.6%	1,989	2,484	-19.9%								
Sep	170	562	-69.8%	1,865	1,576	18.3%								
Oct	202	233	-13.3%	1,620	1,206	34.3%								
Nov	72	0	100.0%	283	152	86.2%								
Dec	0	0	0.0%	0	0	0.0%								
Total	1,807	2,760	-34.5%	12,216	13,920	-12.2%	18,153*	24,485*	-25.9%					

*Total player equals tournament players, open players and annual ticket rounds.

** Estimated to be 85% of all tournament players.

TEN YEAR TRENDS

Year	Estimated Visitors	Convention Attendance*	Hotel Occupancy**	Motel/Limited Service Occupancy**	Total Hotel/Motel Occupancy**
2003	4,865,485	362,713	74.6%	52.9%	70.3%
2002	4,914,854	179,999	75.2%	51.4%	70.7%
2001	5,008,504	190,124	76.9%	53.0%	70.3%
2000	5,188,325	176,926	78.4%	40.2%	71.7%
1999	5,051,101	192,816	78.1%	46.1%	71.1%
1998	5,121,693	256,285	78.3%	45.7%	71.6%
1997	5,155,649	250,184	77.8%	46.1%	71.3%
1996	5,215,010	196,707	82.3%	45.1%	73.9%
1995	4,851,269	314,137	85.1%	51.3%	76.3%
1994	4,472,506	203,389	83.5%	49.0%	74.1%

Year	Room Tax (Gross)	Licensed Room/Units (All Types)***	Gross Revenue Gaming (\$000)	Airport Passengers Total	Average Daily Highway Traffic (I-80 @Verdi)
2003	\$32,246,808	26,816	\$1,010,452	4,586,027	34,560
2002	\$32,258,237	28,136	\$1,034,789	4,510,406	30,095
2001	\$33,162,884	27,257	\$1,080,732	4,932,648	28,226
2000	\$32,803,096	27,583	\$1,140,598	5,620,246	28,386
1999	\$29,548,900	27,793	\$1,073,550	6,104,086	27,349
1998	\$23,465,500	27,573	\$1,024,626	6,782,468	25,488
1997	\$22,899,700	28,422	\$995,371	6,862,965	25,686
1996	\$21,324,000	28,085	\$975,629	6,747,173	24,604
1995	\$21,531,800	27,414	\$984,353	5,801,197	24,338
1994	\$19,597,600	25,074	\$918,327	5,336,334	23,538

*For historical purposes, attendees at major bowling tournaments are included as "conventioners". The American Bowling Congress met in Reno in 1995, 1998 and 2001. The Women's International Bowling Congress met in Reno in 1997, 2000 and 2003.

**Occupancy by visitors only. Long-term, semi-permanent occupancy is not included.

***Licensed lodging properties include: Hotels, Motels/Ltd Service, RV Parks, Condos and Timeshares, properties of any type that do mainly long-term, non-visitor business (28 days or longer) and others.

Acknowledgments

The Reno-Sparks Convention & Visitors Authority wishes to thank the following contributors to this report:

Airport Authority of Washoe County – Airport traffic data

Amtrak

Nevada Gaming Control Board – Internet report data

Nevada Department of Transportation

Western Regional Climate Center – Temperatures

U.S. Census Bureau – Population

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