LAS VEGAS VISITOR PROFILE STUDY 2014

LAS VEGAS CONVENTION AND VISITORS AUTHORITY glsresearch

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LAS VEGAS VISITOR PROFILE

Calendar Year 2014

Annual Report

Prepared for:

Las Vegas Convention And Visitors Authority

By:

GLS Research

ACKNOWLEDGMENTS

The Las Vegas Convention and Visitors Authority and GLS Research extend thanks to the Las Vegas community for their cooperation on this research project. Special appreciation is noted for cooperation and assistance received from the hotel, motel, and casino industry. Appreciation is also extended to the interviewers and Las Vegas visitors, without whose dedicated cooperation this study could not have been completed.

VISITOR PROFILE STUDY

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EXECUTIVE SUMMARY

The Las Vegas Visitor Profile Study is reported annually to provide an ongoing assessment of the Las Vegas visitor and trends in visitor behavior over time, based on ongoing intercept surveys of travelers to Las Vegas.

This report presents the findings from in-person interviews GLS Research collected as follows: 3,600 each from January 1, 2010 to December 31, 2010, January 1, 2011 to December 31, 2011, January 1, 2012 to December 31, 2012; January 1, 2013 to December 31 2013, and January 1, 2014 to December 31, 2014. Approximately 300 interviews were conducted per month in 2010, 2011, 2012, 2013, and 2014.

This report presents the results of calendar year 2014, as well as the four previous years (2010, 2011, 2012, and 2013). Statistically significant differences in the behavior, attitudes, and opinions of visitors from year to year are pointed out in the text of the report. Throughout this report, if data is not presented for all five years, it is because the question was not asked for all five years.

When we note that a difference between subgroups on a particular measure is “significant” or “statistically significant,” we mean that there is a 95% or better chance that the difference is the result of true differences between the subgroup populations and is not due to sampling error alone. When we note that a difference between subgroups is “not significant” or “not statistically significant,” we mean that there is less than a 95% chance that the difference is the result of true differences between the subgroups.

In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2014. These questions will be rotated back into the questionnaire in Calendar Year 2015 and subsequently asked every other year. These questions are noted in the text accompanying the figures in the body of this report.

This section presents the research highlights. The findings are presented in detail beginning on page 12.

EXECUTIVE SUMMARY

REASONS FOR VISITING

Nearly one in five (19%) 2014 visitors to Las Vegas indicated they were first-time visitors to Las Vegas, up from 2011 – 2013 results. Forty-seven percent (47%) of all visitors said their primary reason for visiting Las Vegas this trip was vacation or pleasure, up significantly from 41% last year. Twelve percent (12%) said they came primarily to gamble, down from last year, but up from 2010 – 2012 readings. Eleven percent (11%) were visiting friends or relatives. Among repeat visitors, 42% came for vacation or pleasure, up from 37% last year, 14% came to gamble (down from last year, but up from 2010 – 2012), and 11% came to visit friends and relatives. The majority of first-time visitors continue to come primarily for vacation or pleasure (69%). Eight percent (8%) of first-time visitors said they were visiting friends and relatives, down from 2012 and last year. Among all visitors, the average number of visits over the past five years was 5.7 (down from 6.4 last year). Among all visitors, the average number of visits in the past year was 1.6, down from 1.7 in 2013.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2010	2011	2012	2013	2014
Proportion of visitors who were first-time visitors	18%	16%	16%	15%	19%
Proportion of visitors whose primary purpose for current trip was vacation or pleasure	51%	50%	47%	41%	47%
Proportion of visitors whose primary purpose for current trip was to gamble	9%	7%	8%	15%	12%
Proportion of visitors whose primary purpose for current trip was to visit friends and relatives	11%	13%	14%	12%	11%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	47%	46%	43%	37%	42%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	10%	8%	9%	17%	14%
Proportion of repeat visitors whose primary purpose for current trip was to visit friends and relatives	12%	15%	14%	12%	11%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	69%	70%	66%	64%	68%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	1%	1%	1%	4%	4%
Proportion of first-time visitors whose primary purpose for current trip was to visit friends and relatives	8%	7%	14%	13%	8%
Average number of visits in past five years	5.9	6.2	5.8	6.4	5.7
Average number of visits in past year	1.7	1.7	1.6	1.7	1.6

EXECUTIVE SUMMARY

TRAVEL PLANNING

Fifty-eight percent (58%) of visitors in 2014 arrived via ground transportation and 42% arrived by air. Forty-seven percent (47%) of visitors said they used their own vehicles while traveling around Las Vegas. Thirty-two percent (32%) reported taking a taxi (up from 2010 – 2013), while 55% volunteered that they walked while in Las Vegas (also up from 2010 – 2013).

The proportion of visitors who reported using a travel agent to plan their current trip to Las Vegas was 16% in 2014, up from 2010 – 2012. Visitors were asked if they used the Internet to plan their current trip to Las Vegas, and over two-thirds (68%) said they had done so, a significant increase over 2010 – 2013. Of these visitors, 62% said they booked their accommodations online (down significantly from 2010 – 2012), while 44% said they used the Internet to book their transportation (down from 2010 – 2012). Fifty-four percent (54%) said they found information online that influenced their choice of accommodations, up from 51% last year.

The proportion of visitors who said they visited Downtown Las Vegas was 36%, up significantly from 30% last year.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2010	2011	2012	2013	2014
Proportion of visitors who traveled to Las Vegas by ground transportation (automobile/bus/RV)	59%	56%	57%	58%	58%
Proportion of visitors who traveled to Las Vegas by air	41%	44%	43%	42%	42%
Proportion of visitors who used their own vehicle when traveling around Las Vegas	48%	49%	47%	50%	47%
Proportion of visitors who reported walking when traveling around Las Vegas	28%	25%	48%	52%	55%
Proportion of visitors who used taxis when traveling around Las Vegas	23%	24%	29%	27%	32%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Las Vegas	12%	13%	13%	15%	16%
Proportion who used the Internet to plan trip	53%	55%	60%	64%	68%
Proportion of visitors who used the Internet to book accommodations in Las Vegas	67%	69%	66%	59%	62%
Proportion of visitors who used the Internet to book transportation to Las Vegas	56%	54%	47%	41%	44%
Proportion of visitors who used the Internet and said it influenced their choice in accommodations	52%	52%	54%	51%	54%
Proportion of visitors who visited Downtown Las Vegas on their current trip	45%	34%	36%	30%	36%

EXECUTIVE SUMMARY

TRIP CHARACTERISTICS AND EXPENDITURES

The average party size in 2014 was 2.4 persons, up from 2011. Ten percent (10%) of visitors had children under the age of 21 in their immediate party, the same as last year. Virtually all visitors (99.6%) stayed overnight.

Visitors in 2014 stayed an average of 3.2 nights and 4.2 days in Las Vegas, down from 2010 and 2011. Among overnighters, 96% stayed in a hotel or motel, with an average of 2.1 room occupants. One-third (33%) of visitors staying in a hotel or motel paid a regular room rate, up from 2010 – 2011. Eighteen percent (18%) purchased a package trip, up from 14% in 2012 and 13% last year. The average cost of such a package in 2014 was $815.14, not significantly different from last year.

Over the course of their entire stay in Las Vegas, visitors spent an average of $281.88 for food and drink (similar to last year) and $68.83 for local transportation (up from past years). Visitors spent an average of $149.77 for shopping (up from 2010 and 2011), $47.56 for shows (up from $38.45 last year), and $14.49 for sightseeing (up from past years).

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2010	2011	2012	2013	2014
Average number of adults in immediate party	2.4	2.3	2.4	2.4	2.4
Proportion of visitors with persons under 21 in their immediate party	7%	10%	11%	10%	10%
Proportion of visitors who stayed overnight	99.3%	99.8%	99.7%	99.8%	99.6%
Days stayed (average)	4.6	4.7	4.3	4.3	4.2
Nights stayed (average)	3.6	3.7	3.3	3.3	3.2
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	95%	95%	96%	96%	96%
Number of room occupants (average — hotel/motel only)	2.0	2.1	2.1	2.2	2.1
Lodging expenditures (average per night — non-package and non-comp)	$79.64	$84.04	$93.13	$83.62	$86.55
Proportion of visitors who paid a regular room rate	23%	18%	32%	32%	33%
Proportion of visitors who bought a package or travel group trip	16%	18%	14%	13%	18%
Average cost of package per person (among package/tour group visitors)	$651.02	$757.83	$743.65	$868.24	$815.14
Average trip expenditures for food and drink	$256.82	$274.69	$265.11	$278.95	$281.88
Average trip expenditures for local transportation	$62.87	$64.25	$57.77	$59.68	$68.83
Average trip expenditures for shopping	$122.80	$129.34	$149.29	$140.90	$149.77
Average trip expenditures for shows	$49.28	$47.52	$42.89	$38.45	$47.56
Average trip expenditures for sightseeing	$7.21	$10.24	$9.63	$9.29	$14.49

EXECUTIVE SUMMARY

GAMING BEHAVIOR AND BUDGETS

Seventy-one percent (71%) of 2014 visitors said they gambled while in Las Vegas, the same as last year, but down significantly from 80% in 2010 and 77% in 2011. Gamblers spent an average of 2.6 hours per day gambling, down significantly from 2.9 hours each in 2010, 2011, and last year. The average gaming budget in 2014 was $530.11, similar to last year but up significantly from $466.20 in 2010 and $447.63 in 2011. Twenty-four percent (24%) of visitors said they would be *more* likely to visit Las Vegas even with the wider gambling choices available to them, the same as last year's results.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2010	2011	2012	2013	2014
Proportion who gambled while visiting Las Vegas	80%	77%	72%	71%	71%
Average number of hours per day spent gambling (among those who gambled)	2.9	2.9	2.6	2.9	2.6
Average trip gambling budget (among those who gambled)	$466.20	$447.63	$484.70	$529.57	$530.11
Proportion who said they would be “more likely” to visit Las Vegas even with more places to gamble outside Las Vegas	35%	27%	25%	24%	24%

EXECUTIVE SUMMARY

ENTERTAINMENT

Sixty-five percent (65%) of visitors attended shows during their current stay, down from 72% last year. Among those who saw a show in Las Vegas, 77% went to a lounge act, down significantly from 87% last year. Seventeen percent (17%) of visitors who saw shows saw a big-name headliner, up from 2012 – 2013. One in ten (10%) of these visitors attended comedy shows, up from 8% last year. Nineteen percent (19%) of all visitors said they had been to other paid attractions in Las Vegas, up from 13% in 2012 and 15% last year.

SUMMARY TABLE OF ENTERTAINMENT ACTIVITIES

	2010	2011	2012	2013	2014
Proportion who attended any shows during their current stay in Las Vegas	68%	60%	65%	72%	65%
Proportion who attended lounge acts (among those who attended shows)	66%	73%	78%	87%	77%
Proportion who attended big-name headliner performances (among those who attended shows)	18%	17%	14%	13%	17%
Proportion who attended comedy shows (among those who attended shows)	17%	11%	11%	8%	10%
Proportion who went to other paid attractions in Las Vegas	20%	18%	13%	15%	19%

ATTITUDINAL INFORMATION

Ninety-six percent (96%) of visitors reported being “very satisfied” with their trip to Las Vegas, up significantly from 2010 – 2013 readings.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2010	2011	2012	2013	2014
Proportion who were “very satisfied” with their current trip to Las Vegas	94%	92%	94%	89%	96%
Proportion who were “somewhat satisfied” with their current trip to Las Vegas	5%	7%	5%	10%	4%

EXECUTIVE SUMMARY

VISITOR DEMOGRAPHICS

Visitors in 2014 were likely to be married (80%, up from 77% in 2011 and 75% in 2012), earning $40,000 or more (85%, down significantly from 88% last year), and employed (64%, down from 69% in 2012 and 67% last year). Twenty percent (20%) were retired, the same as last year. The proportion of visitors who were 40 years old or older was 57% (down from 2010 – 2011), and the average age was 45.2 (down significantly from 2010 – 2011). Just under one-half (48%) were college graduates, down significantly from 52% in 2012 and 51% last year. More than one-half (53%) of visitors were from the western United States (consistent with past results), with the bulk of them coming from California (33%, the same as in 2012 and 2013). Nineteen percent (19%) of visitors were from foreign countries, up significantly from 16% in 2011.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2010	2011	2012	2013	2014
Proportion of visitors who were married	79%	77%	75%	79%	80%
Proportion of visitors with a household income of $40,000 or more	81%	87%	84%	88%	85%
Proportion of visitors who were employed	66%	66%	69%	67%	64%
Proportion of visitors who were retired	27%	25%	19%	20%	20%
Proportion of visitors who were 40 years old or older	71%	70%	58%	58%	57%
Average age	49.2	49.0	44.8	45.8	45.2
Proportion of visitors with a college diploma	48%	50%	52%	51%	48%
Proportion of visitors from the West	54%	55%	54%	52%	53%
Proportion of visitors from California	30%	31%	33%	33%	33%
Proportion of visitors from a foreign country	18%	16%	17%	20%	19%

EXECUTIVE SUMMARY

SUMMARY OF ECONOMIC IMPACT FACTORS

The following table summarizes the various factors included throughout this report related to the economic impact of Las Vegas visitors in 2014.

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2010	2011	2012	2013	2014
Days stayed (average)	4.6	4.7	4.3	4.3	4.2
Nights stayed (average)	3.6	3.7	3.3	3.3	3.2
Proportion of visitors who stayed overnight	99.3%	99.8%	99.7%	99.8%	99.6%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	95%	95%	96%	96%	96%
Lodging expenditures (average per night — non-package and non-comp)	$79.64	$84.04	$93.13	$83.62	$86.55
Proportion of visitors who bought a package or travel group trip	16%	18%	14%	13%	18%
Average cost of package per person (among package/tour group visitors)	$651.02	$757.83	$743.65	$868.24	$815.14
Number of room occupants (average)	2.0	2.1	2.1	2.2	2.1
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Average trip expenditures for shopping	$122.80	$129.34	$149.29	$140.90	$149.77
Average trip expenditures for shows	$49.28	$47.52	$42.89	$38.45	$47.56
Average trip expenditures for sightseeing	$7.21	$10.24	$9.63	$9.29	$14.49
Proportion who gambled while visiting Las Vegas	80%	77%	72%	71%	71%
Average trip gambling budget (among those who gambled)	$466.20	$447.63	$484.70	$529.57	$530.11

INTRODUCTION

The Las Vegas Visitor Profile Study is reported annually to provide an ongoing assessment of the Las Vegas visitor and trends in visitor behavior over time, based on ongoing intercept surveys of travelers to Las Vegas.

More specifically, the Las Vegas Visitor Profile aims:

- To provide a profile of Las Vegas visitors in terms of socio-demographic and behavioral characteristics.
- To monitor trends in visitor behavior and visitor characteristics.
- To supply detailed information on the vacation and gaming habits of different visitor groups, particularly gaming and non-gaming expenditures.
- To allow the identification of market segments and potential target markets.
- To provide a basis for calculating the economic impact of different visitor groups.
- To determine visitor satisfaction levels.

In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2014. These questions will be rotated back into the questionnaire in Calendar Year 2015 and subsequently asked every other year. These questions are noted in the text accompanying the figures in the body of this report.

METHODOLOGY

In-person interviews were conducted with 3,600 randomly selected visitors. Three-hundred (300) interviews were conducted each month for 12 months from January through December 2014 (From 2005 – 2010, GLS Research, in consultation with the LVCVA, used a sampling plan based on marketing seasons. The goal was to obtain a sufficient number of interviews by marketing season to permit comparisons across seasons). Qualified survey respondents were visitors to Las Vegas (excluding residents of Clark County, Nevada) who were at least 21 years of age. In addition, only visitors who planned to leave Las Vegas within 24 hours were asked to complete the survey.

The results of the Las Vegas Visitor Profile have been weighted to more accurately reflect actual visitors to Las Vegas in terms of mode of transportation, lodging location, and month of visit. Specifically, the mode of transportation weight is derived from a compilation of data provided by the LVCVA, McCarran International Airport, and the Nevada Department of Transportation. The lodging location weight is derived from geographic area specific occupancy rates from independent surveys conducted by the LVCVA. The month of visit weight is derived from monthly room nights occupied data, also from independent surveys conducted by the LVCVA as part of their ongoing room occupancy audit.

Visitors were intercepted in the vicinity of Las Vegas casinos, hotels, motels, and RV parks. To assure a random selection of visitors, different locations were utilized on each interviewing day, and interviewing was conducted at different times of the day. Upon completion of the interview, visitors were given souvenirs as “thank you’s”. Verification procedures were conducted throughout the project to assure accurate and valid interviewing.

Beginning with the 2012 Visitor Profile, apparent shifts in certain results may partially be attributed to subtle changes in the sampling methodology. Enhancing the current methodology allowed for an updated mix of survey locations with new outdoor sites added to the current indoor locations at area hotels and motels. Additionally, the age range of surveyors was broadened to help achieve as representative a sample as possible. Looking ahead, continued monitoring of the survey collection processes will identify any shifts with the data and determine if they are a result of methodological changes or reflective of actual changes in the visitor characteristics.

Interviews were edited for completeness and accuracy, and entered into a computerized database for analysis. The information was then analyzed using statistical software packages available to GLS Research. The questionnaire administered to visitors is appended to this report in the form of aggregate results.

Throughout this report, bar charts are used to illustrate the data. The data presented in these charts are based on the total sample of respondents for 2014 and the preceding years, unless otherwise specified. In charts using proportions, those proportions may not add to 100% because of rounding or because multiple responses were permitted.

When we note that a difference between subgroups on a particular measure is “significant” or “statistically significant,” we mean that there is a 95% or better chance that the difference is the result of true differences between the subgroup populations and is not due to sampling error alone. When we note that a difference between subgroups is “not significant” or “not statistically significant,” we mean that there is less than a 95% chance that the difference is the result of true differences between the subgroups.

This report presents the results of the 2014 study, as well as for the previous four calendar years (2010, 2011, 2012, and 2013). Statistically significant differences in the behavior, attitudes, and opinions of visitors from year to year are pointed out in the text of the report. Throughout this report, if data are not presented for all years, it is because the question was not asked in every year.

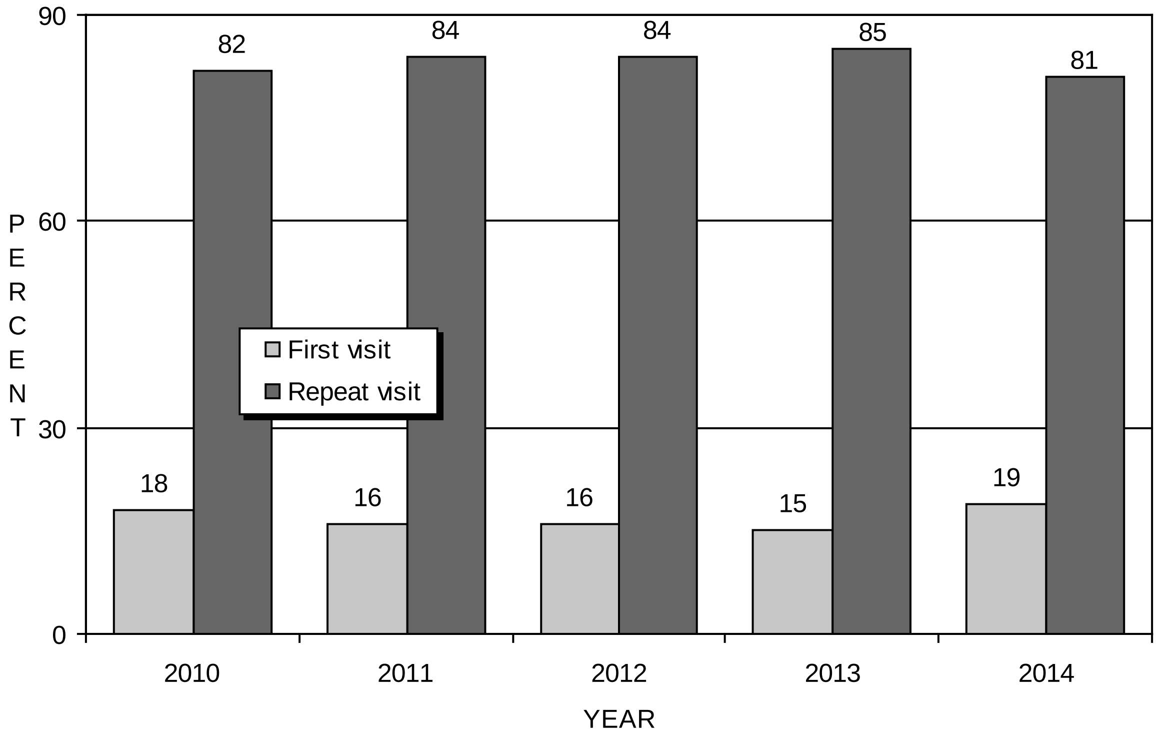
In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2014. These questions will be rotated back into the questionnaire in Calendar Year 2015 and subsequently asked every other year. These questions are noted in the text accompanying the figures in the body of this report.

Details on the findings and conclusions of the survey are presented in the following sections of this report.

SUMMARY OF FINDINGS

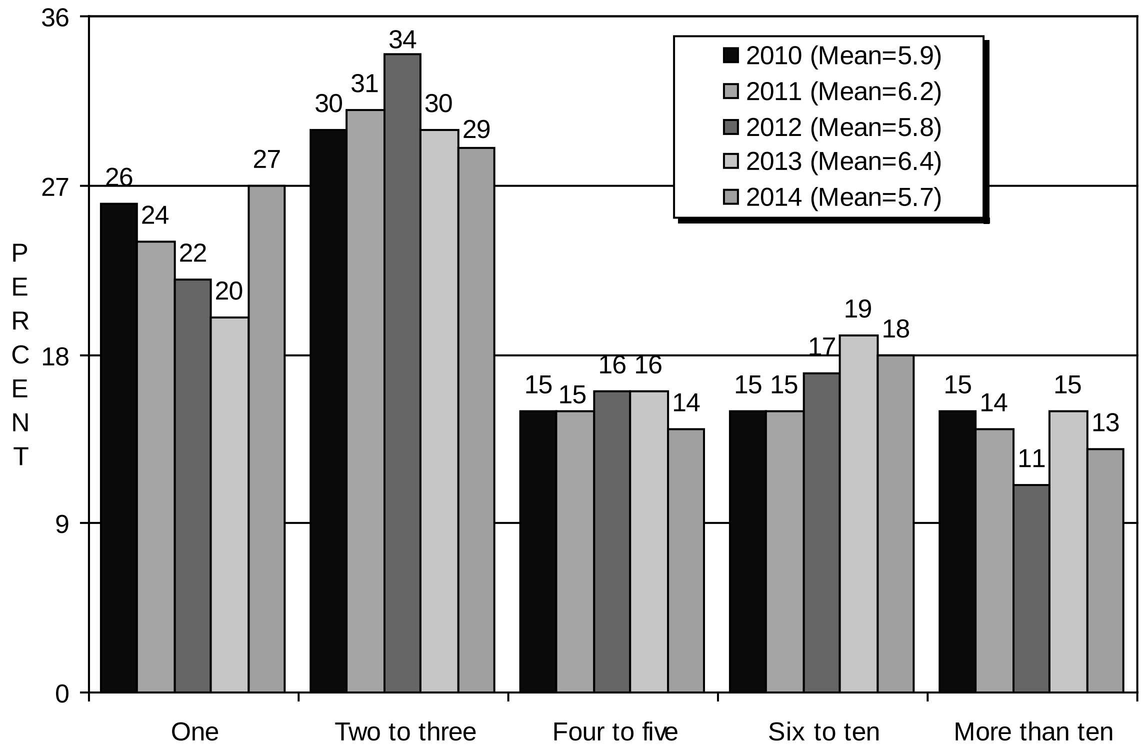
REASONS FOR VISITING

FIGURE 1
First Visit Vs. Repeat Visit



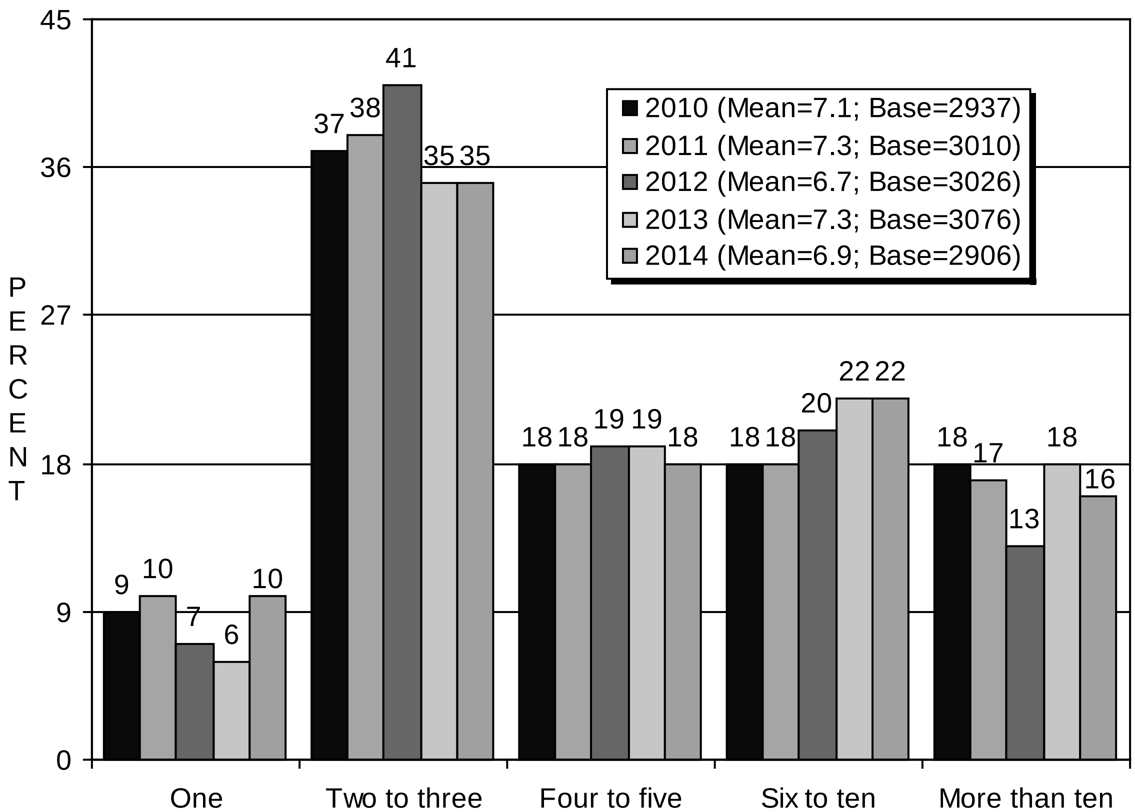
Nineteen percent (19%) of 2014 visitors indicated they were first-time visitors to Las Vegas, up significantly from 16% each in 2011 and 2012 and 15% in 2013 (Figure 1). Eighty-one percent (81%) were repeat visitors, down from 84% each in 2011 and 2012, and 85% last year.

FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



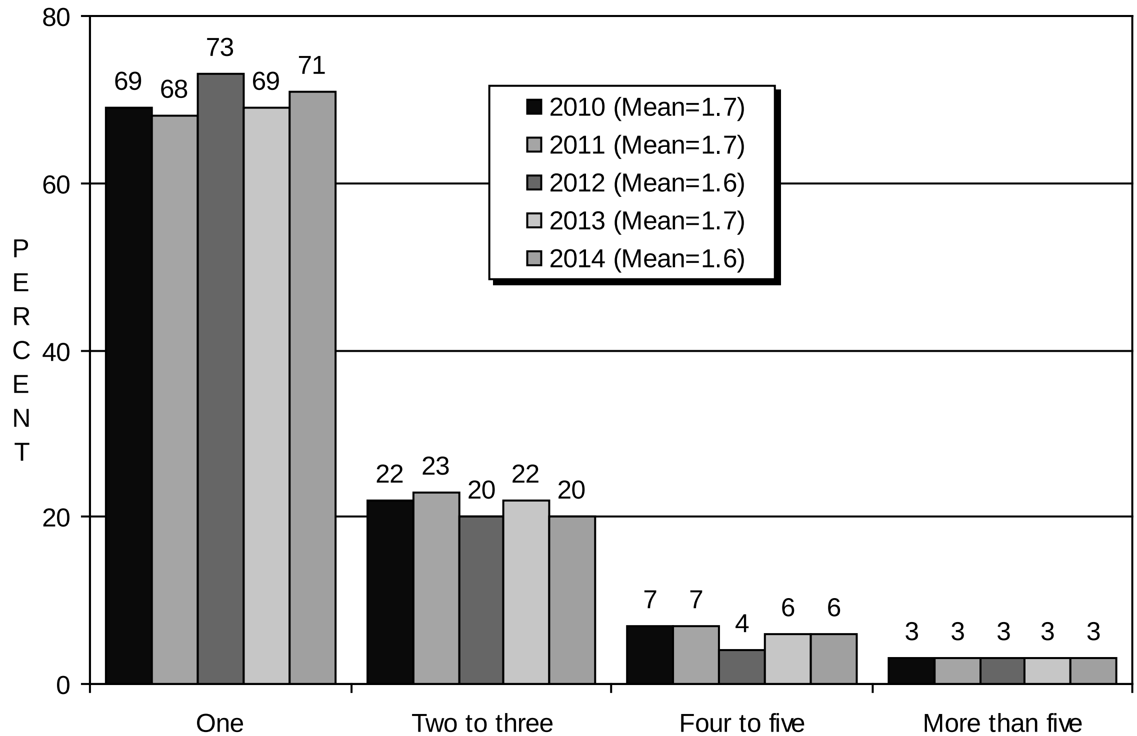
Among all visitors, the average number of visits to Las Vegas over the past five years was 5.7, down significantly from 6.2 in 2011 and 6.4 in 2013 (Figure 2). Twenty-seven percent (27%) of visitors said they visited Las Vegas only once in the past five years (up significantly from 24% in 2011, 22% in 2012, and 20% last year), while 29% visited two to three times (down from 31% in 2011 and 34% in 2012). Eighteen percent (18%) visited six to 10 times in the past five years (up from 15% each in 2010 and 2011), while 13% said they visited more than 10 times (down from 15% each in 2010 and last year).

FIGURE 3
Frequency Of Visits In Past Five Years
(Among Repeat Visitors)



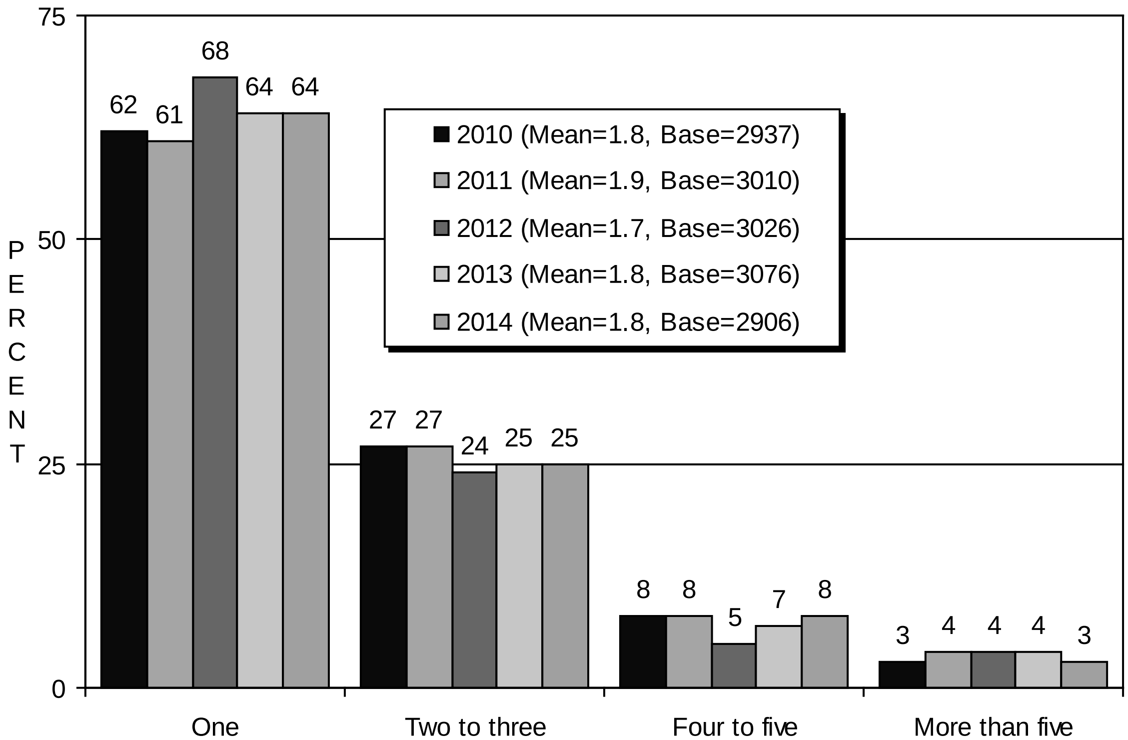
In 2014, repeat visitors reported making an average of 6.9 visits to Las Vegas in the past five years, down from 7.3 each in 2011 and 2013 (Figure 3). Ten percent (10%) of repeat visitors said they visited Las Vegas only once in the past five years (up from 7% in 2012, and 6% last year), while 35% visited two to three times (down from 41% in 2012). Twenty-two percent (22%) visited six to 10 times in the past five years (up from 18% each in 2010 and 2011), while 16% said they visited more than 10 times (up from 13% in 2012 but down from 18% each in 2010 and last year).

FIGURE 4
Frequency Of Visits In Past Year
(Among All Visitors)



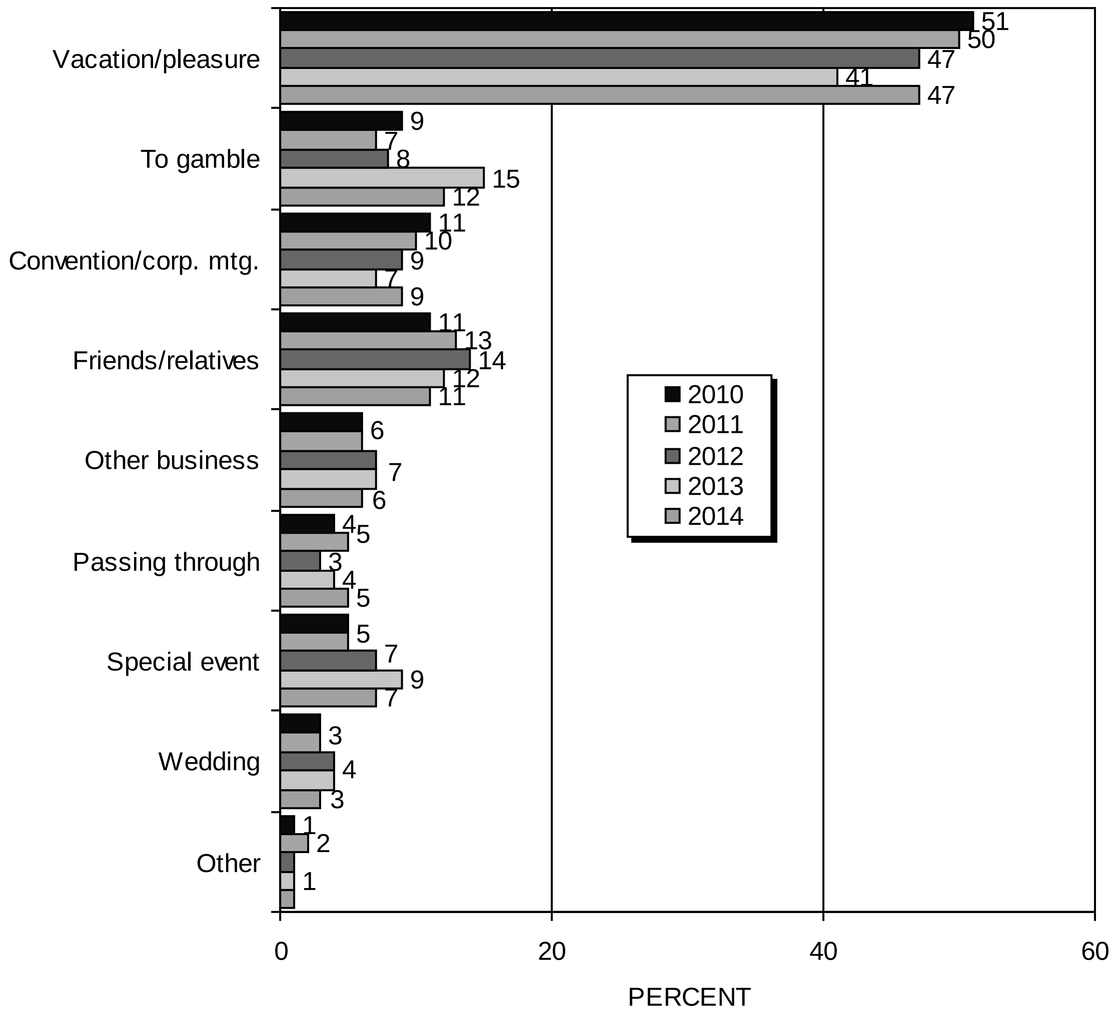
Among all visitors, the average number of visits to Las Vegas in the past 12 months was 1.6, down from 1.7 each in 2010, 2011, and last year (Figure 4). Seventy-one percent (71%) of visitors reported visiting just once in the past year (up from 69% each in 2010 and 2013 and 68% in 2011), while 20% visited two to three times (down from 23% in 2011), 6% visited four to five times (up from 4% in 2012), and 3% visited more than five times.

FIGURE 5
Frequency Of Visits In Past Year
(Among Repeat Visitors)



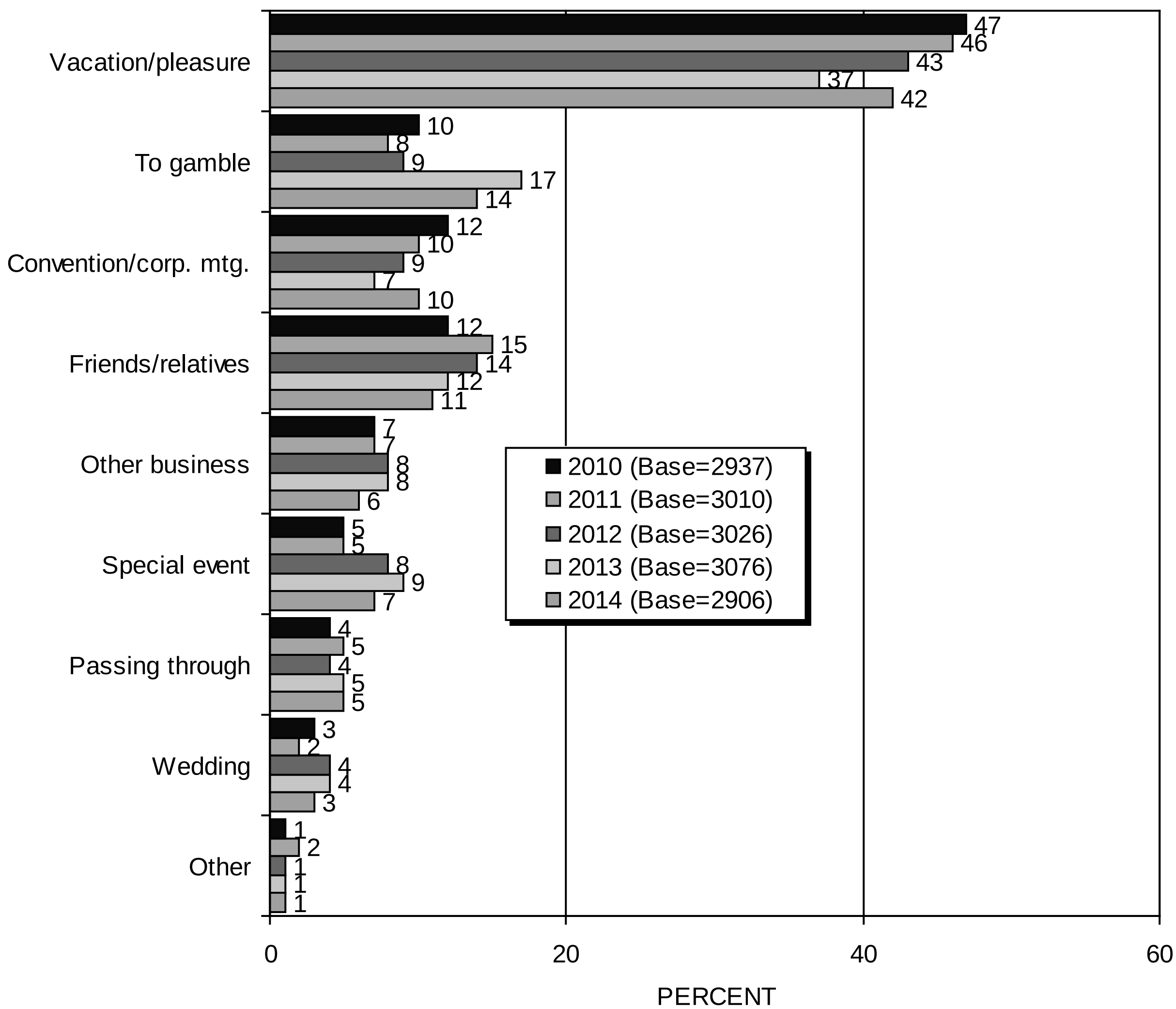
Among repeat visitors, the average number of visits to Las Vegas during the past year was 1.8, down from 1.9 in 2011 (Figure 5). Sixty-four percent (64%) of repeat visitors reported visiting just once in the past year (up significantly from 61% in 2011 but down from 68% in 2012), while 25% visited two to three times, 8% visited four to five times (up from 5% in 2012), and 3% visited more than five times.

FIGURE 6
Primary Purpose Of Current Visit
(Among All Visitors)



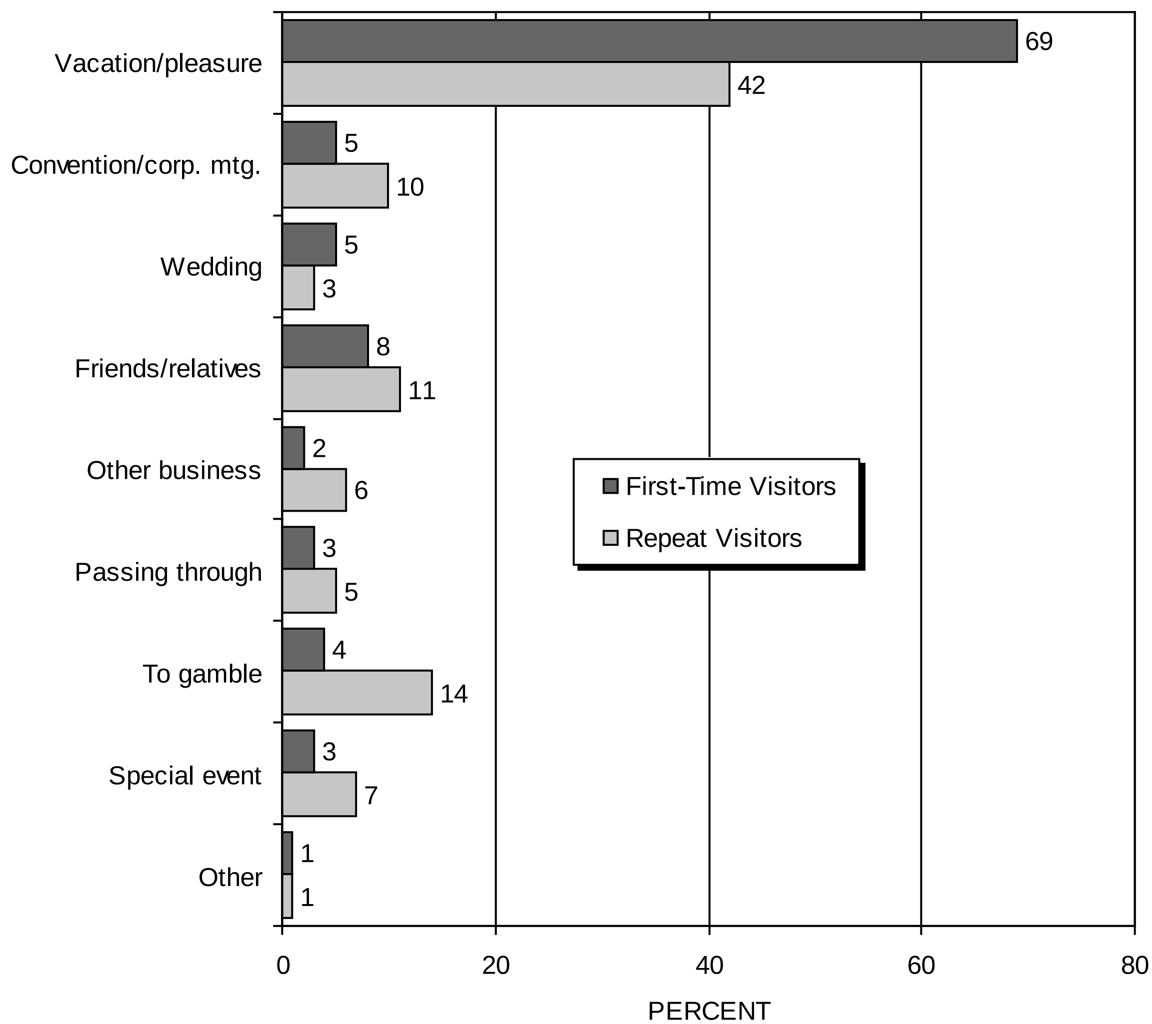
When asked about the primary purpose of their current visit to Las Vegas, 47% of all visitors mentioned vacation or pleasure, down significantly from 51% in 2010, and 50% in 2011, but up from 41% last year (Figure 6). Twelve percent (12%) said they were in Las Vegas primarily to gamble, up significantly from 2010 – 2012 readings, but down from 15% last year. Nine percent (9%) were in Las Vegas to attend a convention, trade show, or corporate meeting (down from 11% in 2010, but up from 7% last year), while 6% were in town on other business (down from 7% each in 2012 and 2013). Eleven percent (11%) were visiting friends or relatives, down from 13% in 2011, and 14% in 2012. Seven percent (7%) said they were in town for a special event (up significantly from 5% each in 2010 and 2011, but down from 9% last year), while 3% said they came for a wedding (down from 4% each in 2012 and 2013).

FIGURE 7
Primary Purpose Of Current Visit
(Among Repeat Visitors)



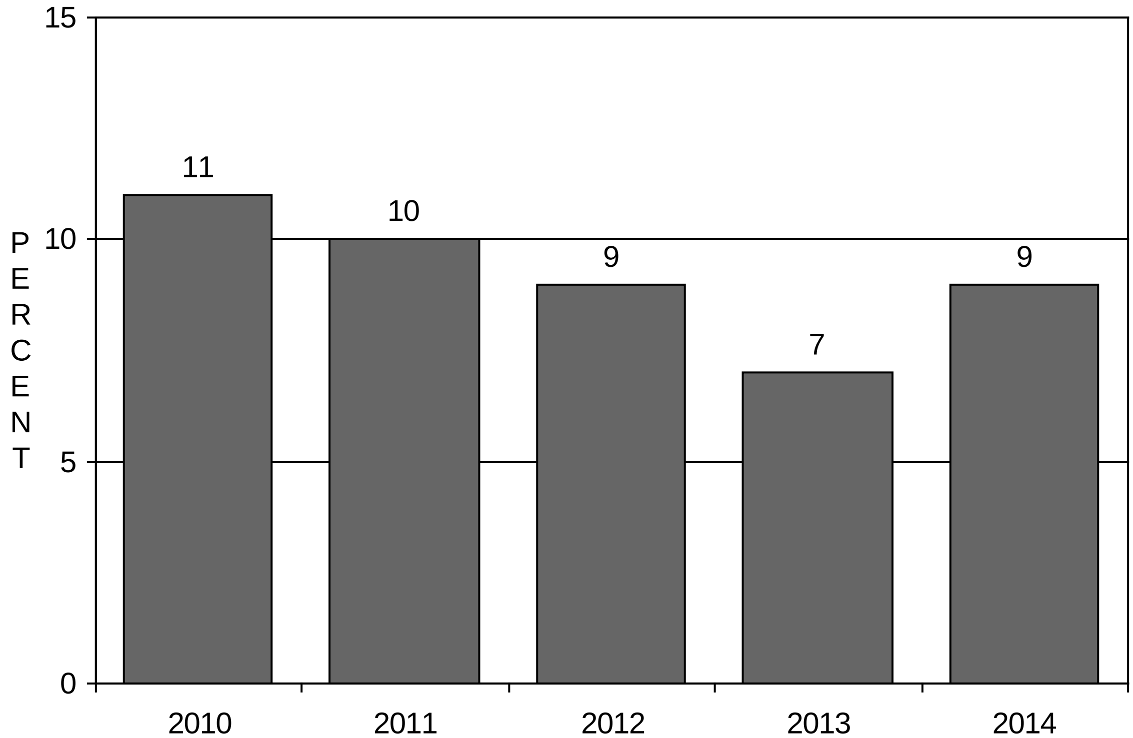
The proportion of repeat visitors who said the primary purpose of their current visit to Las Vegas was vacation or pleasure was 42%, down significantly from 47% in 2010, and 46% in 2011, but up from 37% last year (Figure 7). Fourteen percent (14%) said they were in Las Vegas primarily to gamble, up from 10% in 2010, 8% in 2011, and 9% in 2012, but down from 17% last year. Ten percent (10%) were in Las Vegas to attend a convention, trade show, or corporate meeting (up from 7% in 2013), while 6% were in town on other business (down from 8% each in 2012 and 2013). Eleven percent (11%) were visiting friends or relatives, down from 15% in 2011, and 14% in 2012. Seven percent (7%) said they were in town for a special event (up significantly from 5% each in 2010 and 2011, but down from 9% last year), while 3% came for a wedding (down from 4% each in 2012 and 2013).

FIGURE 8
Primary Purpose Of Current Visit
(First-Time Versus Repeat Visitors — 2014)



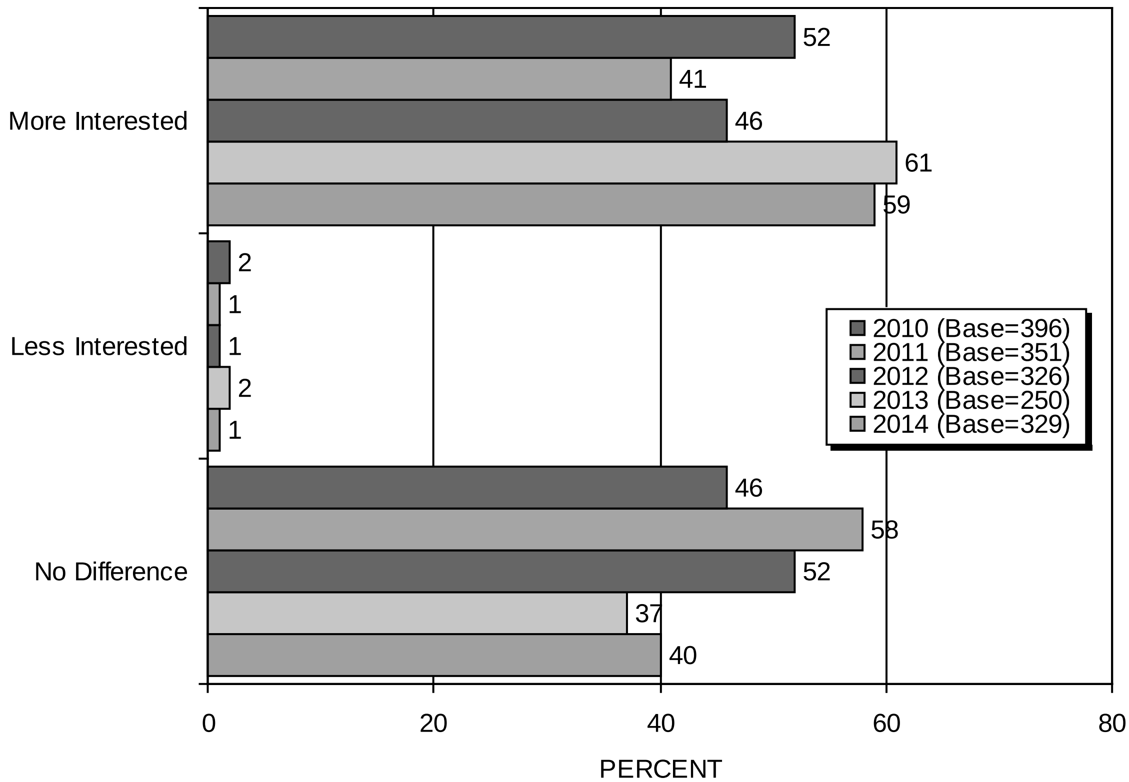
The primary purpose for the current visit among both first-time and repeat visitors is presented in Figure 8. First-time visitors were significantly more likely than repeat visitors to say they were visiting Las Vegas primarily for vacation or pleasure (69% vs. 42%). Repeat visitors were more likely than first-time visitors to say that their current trip to Las Vegas was to gamble (14% vs. 4%), to attend a special event (7% vs. 3%), or for business purposes other than a convention or corporate meeting (6% vs. 2%).

FIGURE 9
Conventions/Trade Shows/Corporate Meetings



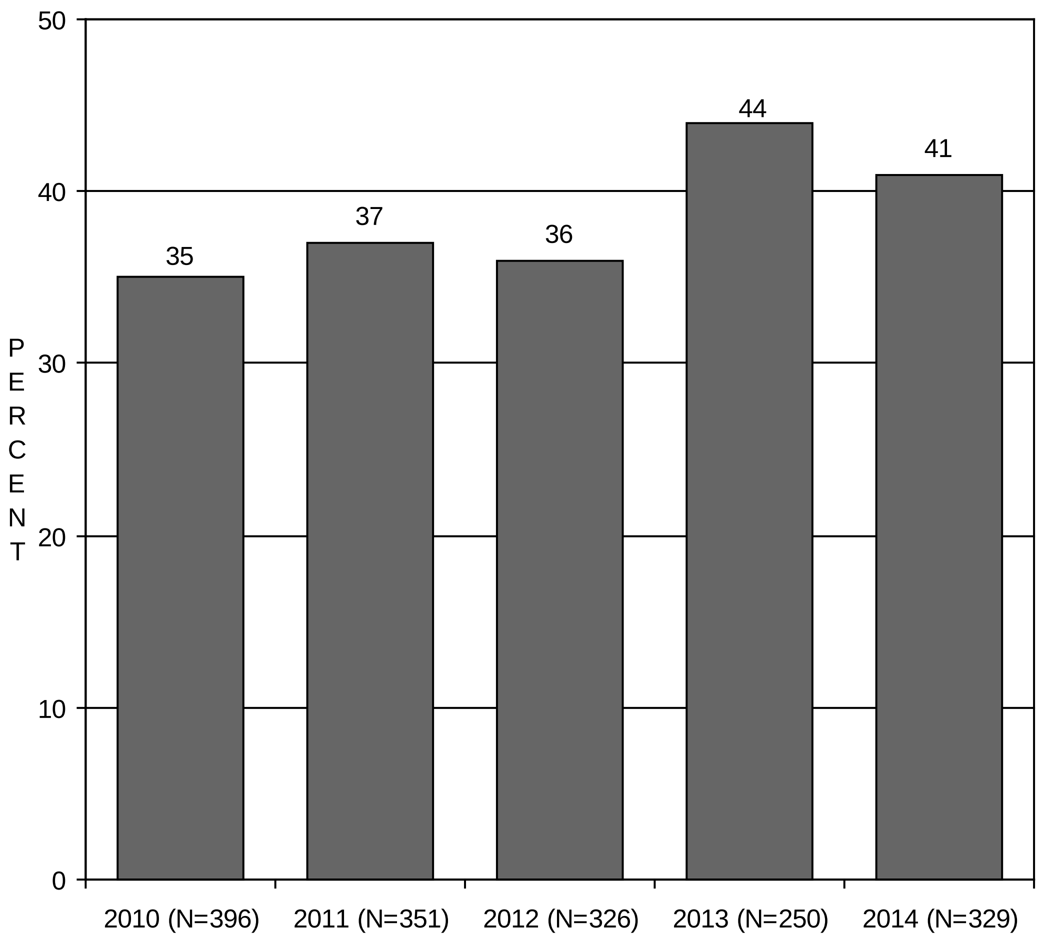
Visitors were asked if they had attended a convention, trade show, or corporate meeting while in Las Vegas (Figure 9). Nine percent (9%) said they had, down significantly from 11% in 2010, but up from 7% last year.

FIGURE 10
Interest In Attending Conventions, Trade Shows, Or
Corporate Meetings In Las Vegas
(Among Visitors Who Attended A Convention,
Trade Show, Or Corporate Meeting)



Convention visitors were asked if holding a convention in Las Vegas made them more or less interested in attending the convention — or if it made no difference (Figure 10). In 2014, 59% said having the convention in Las Vegas made them more interested in attending (up significantly from 41% in 2011 and 46% in 2012), while 40% said it made no difference (down from 58% in 2011 and 52% in 2012). One percent (1%) said it made them less interested.

FIGURE 11
Whether Brought Someone Else Who Did Not Attend
Conventions, Trade Shows, Or Corporate Meetings In Las Vegas*
(Among Visitors Who Attended A Convention, Trade Show, Or Corporate Meeting)

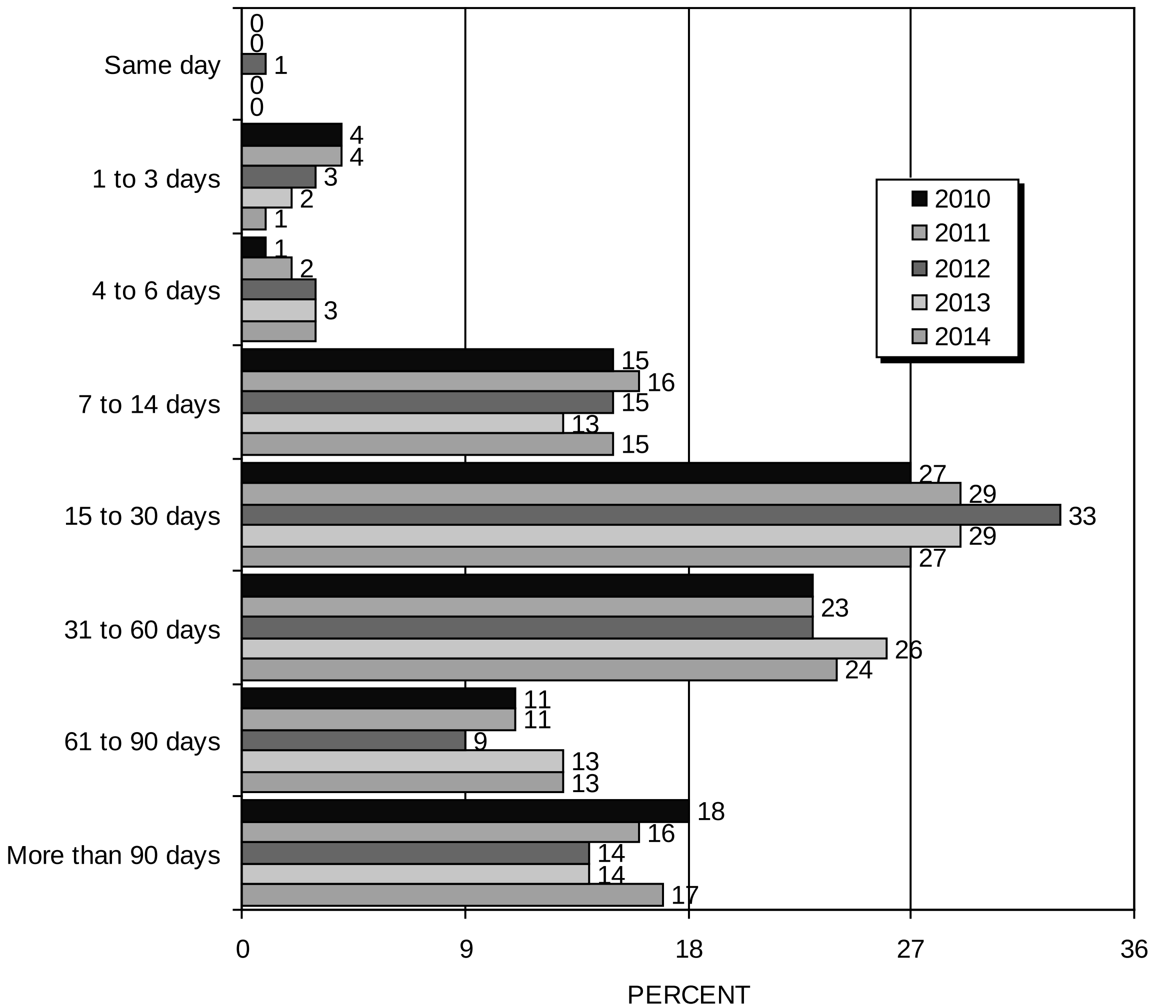


Convention visitors were asked if they had brought a spouse, family member, or friend who was not attending or working at the convention, trade show, or corporate meeting with them. Forty-one percent (41%) of convention visitors in 2014 said they had, not significantly different from past results (Figure 11).

* Only "yes" responses are reported in this chart.

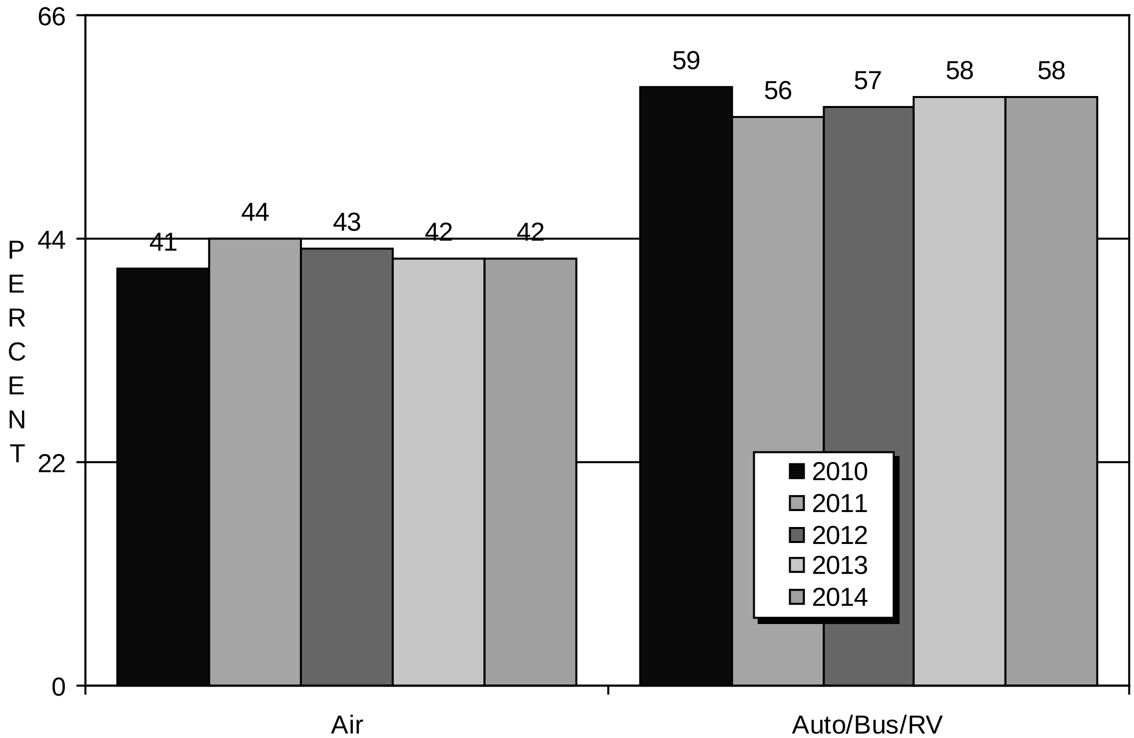
TRAVEL PLANNING

FIGURE 12
Advance Travel Planning



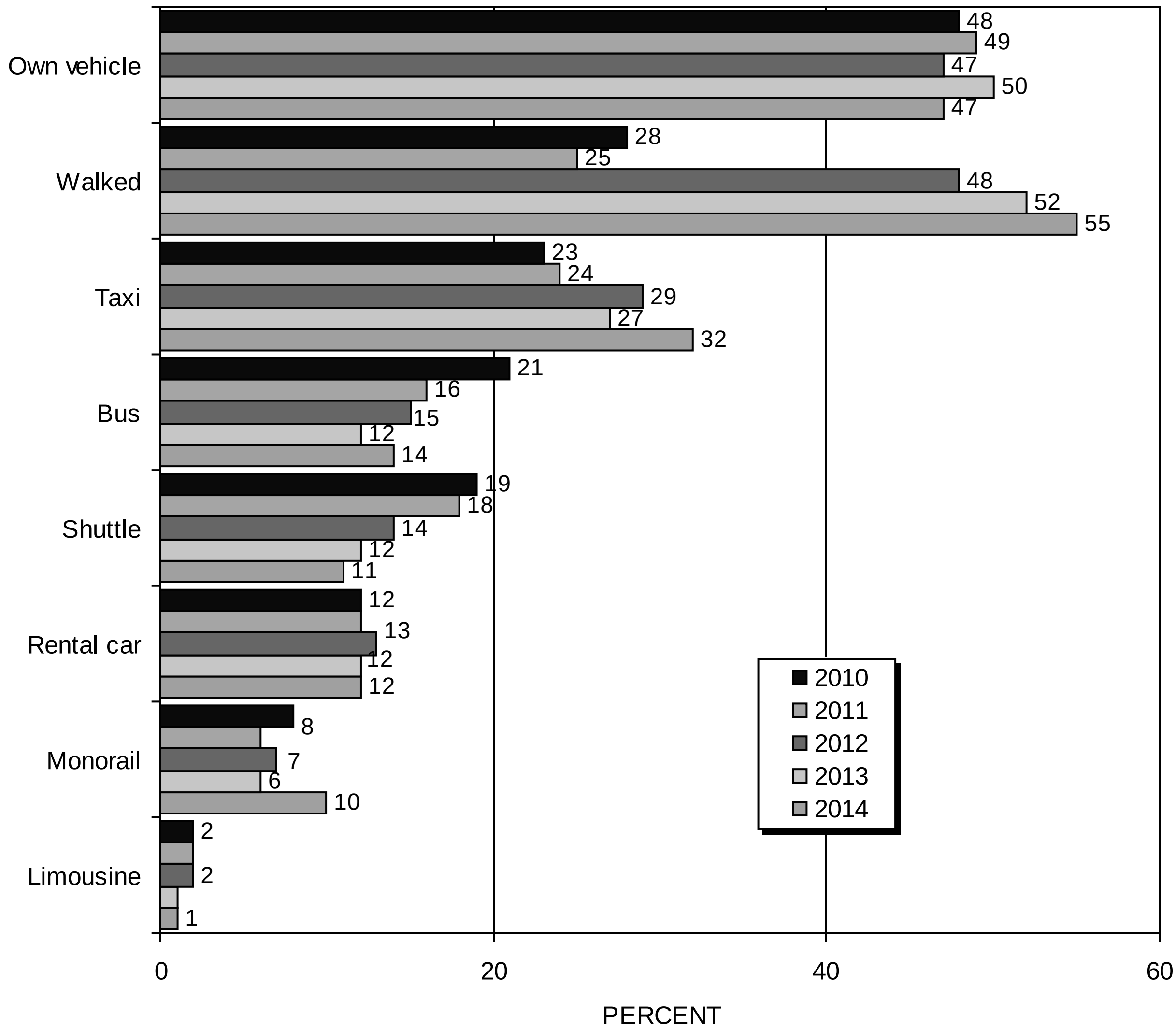
Travel planning varied broadly — from same-day planning to planning more than 90 days in advance. Fifty-four percent (54%) of visitors in 2014 planned their trip to Las Vegas more than one month in advance (Figure 12), up significantly from 50% in 2011 and 46% in 2012. Forty-two percent (42%) planned their trip from one week to one month in advance, down from 45% in 2011 and 48% in 2012. The remaining 4% planned their trip less than a week in advance, down from 5% in 2010 and 2013, 6% in 2011, and 7% in 2012.

FIGURE 13
Transportation To Las Vegas



Forty-two percent (42%) of visitors to Las Vegas in 2014 arrived by air, while 58% arrived by ground transportation, results similar to past years (Figure 13).

FIGURE 14
Local Transportation*



Forty-seven percent (47%) of visitors said that they used their own vehicle when traveling around Las Vegas, down significantly from 50% in 2013 (Figure 14). Fifty-five percent (55%) volunteered that they walked while in Las Vegas, up from prior years. Thirty-two percent (32%) reported taking a taxi, up from 2010 – 2013 results, while 14% reported taking a bus (down from 21% in 2010 and 16% in 2011, but up from 12% last year), 11% used a hotel shuttle (down significantly from 2010 - 2012), and 12% reported using a rental car. Ten percent (10%) reported using the Monorail, up significantly from 2010 – 2013 results.

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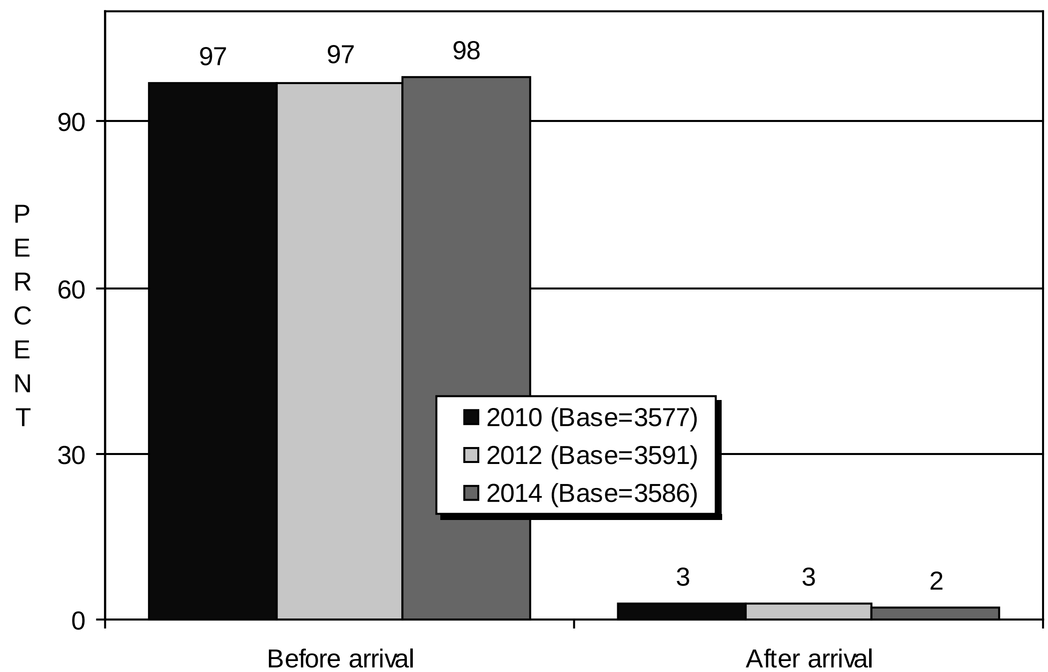
* Multiple responses to this question were permitted.

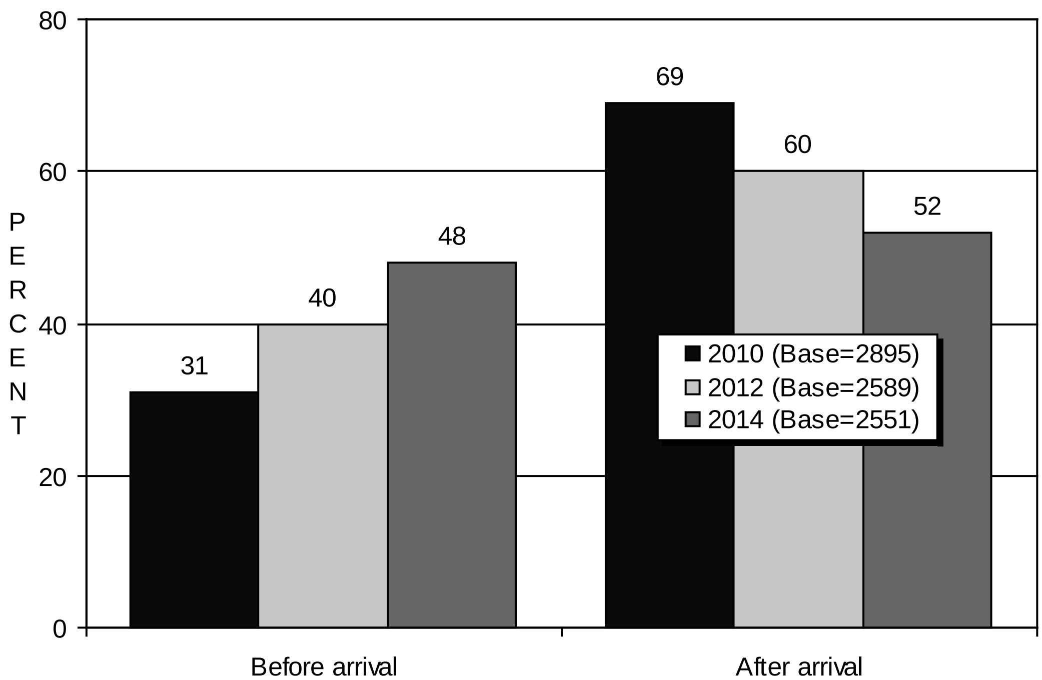
FIGURE 15
When Decided Where To Stay*
(Among Those Who Stayed Overnight – Asked Every Other Year)



Most visitors decided where to stay before leaving home (98%, up from 97% each in 2010 and 2012) (Figure 15).

* This question is asked every other year and was not asked in 2011 or 2013.

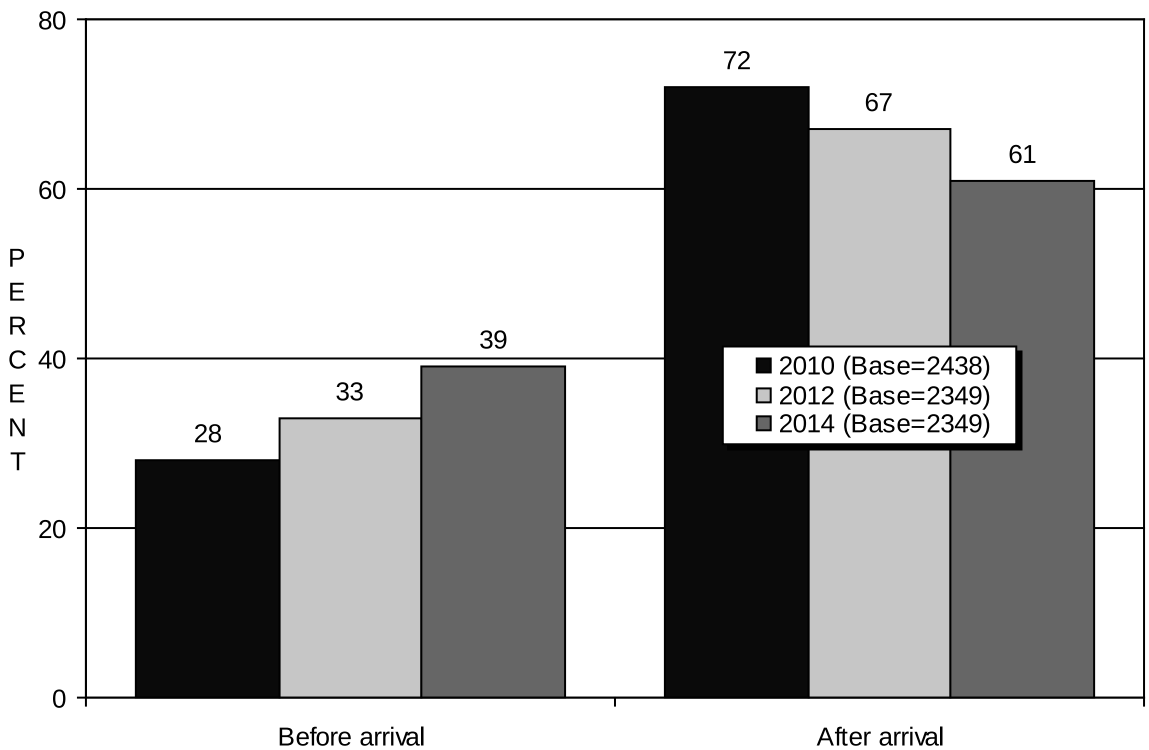
FIGURE 16
When Decided Where To Gamble*
(Among Those Who Gambled – Asked Every Other Year)



Just over one-half (52%) of visitors decided where to gamble after arriving in Las Vegas, down significantly from 69% in 2010 and 60% in 2012 (Figure 16). Forty-eight percent (48%) of visitors decided where to gamble before leaving home, up from 31% in 2010 and 40% in 2012.

* This question is asked every other year and was not asked in 2011 or 2013.

FIGURE 17
When Decided Which Shows To See*
(Among Those Who Saw Shows – Asked Every Other Year)



Six in ten (61%) visitors in 2014 decided which shows to see after arrival, down from 72% in 2010 and 67% in 2012, while 39% decided before leaving home, up from 28% in 2010 and 33% in 2012 (Figure 17).

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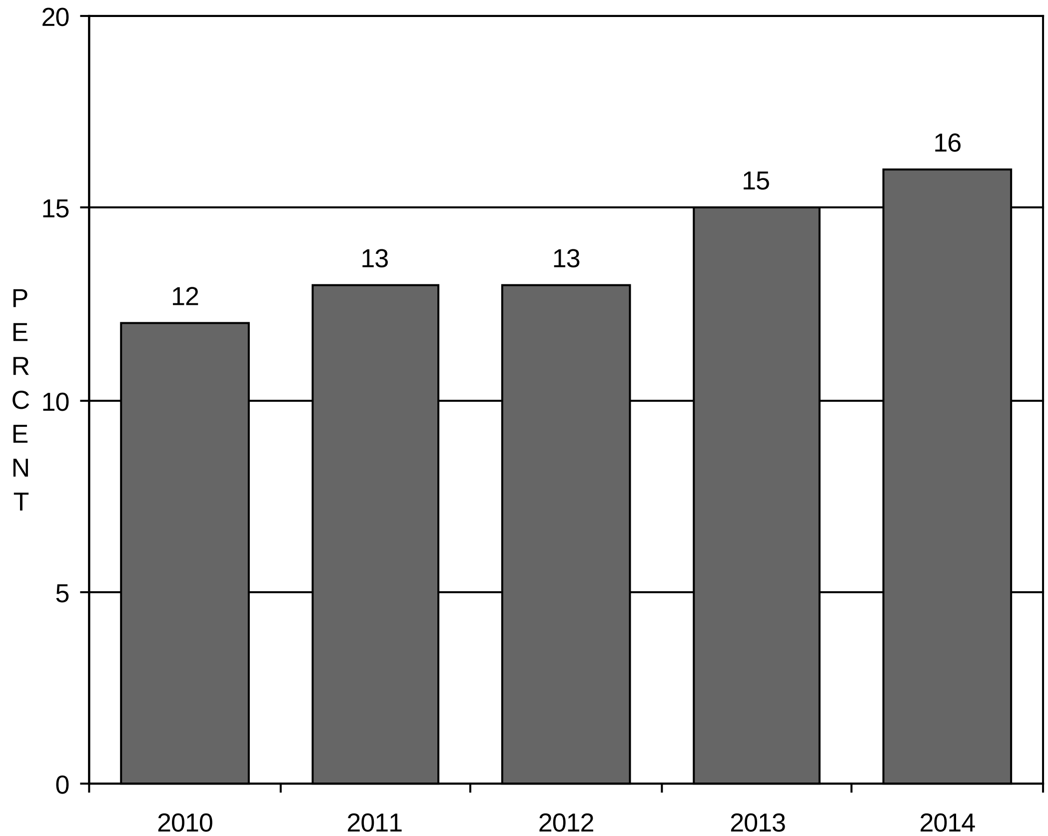
* This question is asked every other year and was not asked in 2011 or 2013.

FIGURE 18
Travel Agent Assistance*



Sixteen percent (16%) of visitors reported using a travel agent to plan their trip to Las Vegas, up from 12% in 2010 and 13% each in 2011 and 2012 (Figure 18).

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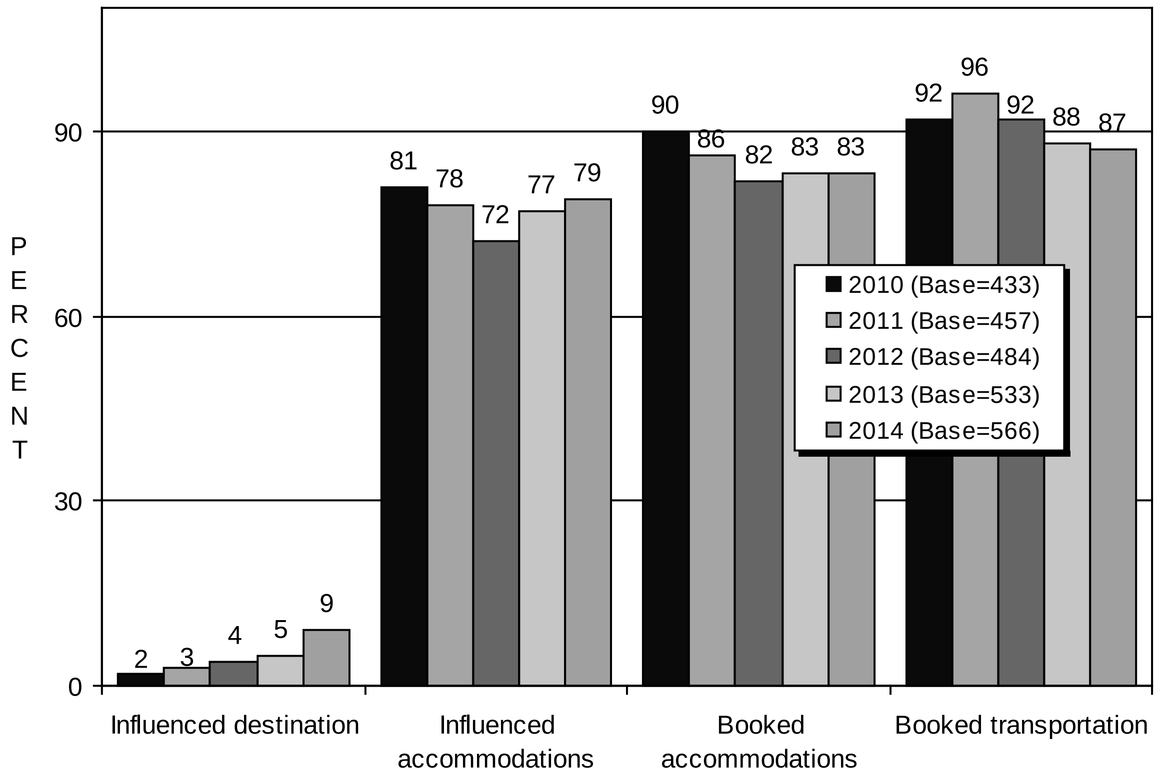
* Only "yes" responses are reported in this chart.

FIGURE 19
Travel Agent Influence And Use*
(Among Those Who Used A Travel Agent)



Among those visitors who used a travel agent to plan their trip to Las Vegas (Figure 19), 83% said the travel agent booked their accommodations (down significantly from 90% in 2010), while 87% said the travel agent booked their transportation (down significantly from 92% each in 2010 and 2012, and 96% in 2011).

Seventy-nine percent (79%) of these visitors said their travel agent influenced their choice of accommodations in Las Vegas (up from 72% in 2012), while 9% said the travel agent influenced their choice of destination (up from 2010 – 2013 results).

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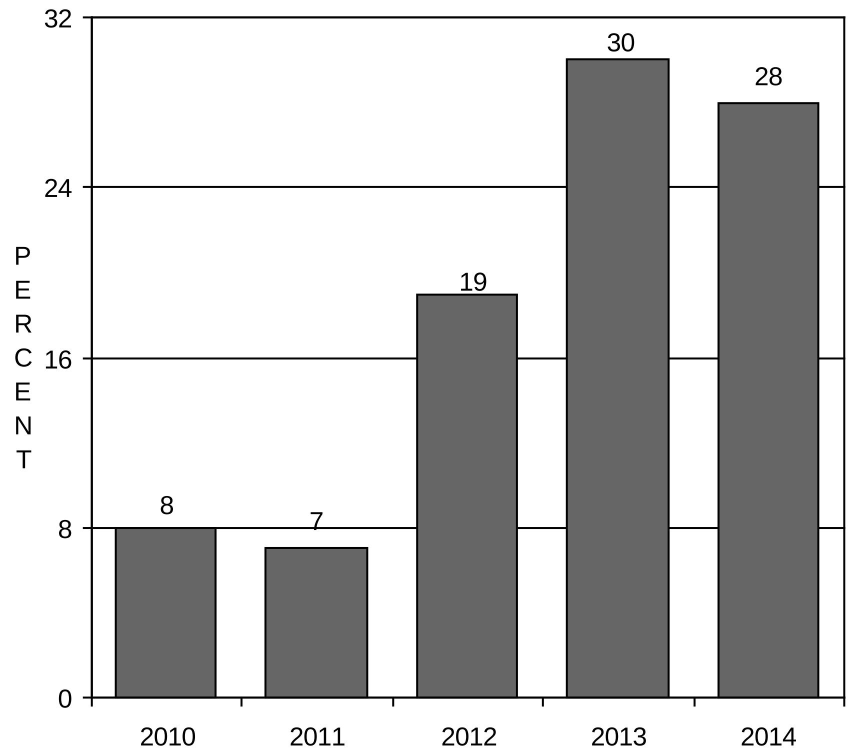
* Only “yes” responses are reported in this chart.

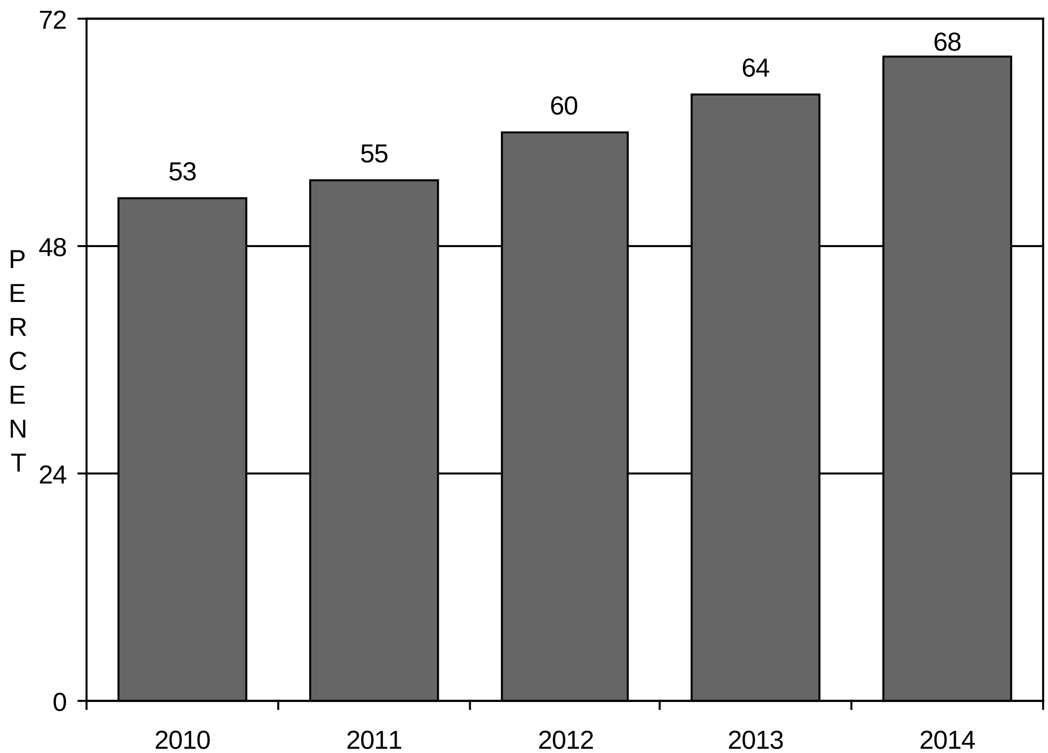
FIGURE 20
Whether Used Social Media Web Sites To Plan Trip*



Visitors were asked if they had used any social media web sites, such as Facebook, Twitter, or others, to help in planning their trip to Las Vegas. In 2014, 28% of visitors said they had, up significantly from 8% in 2010, 7% in 2011, and 19% in 2012, but down from 30% last year (Figure 20).

* Only "yes" responses are reported in this chart.

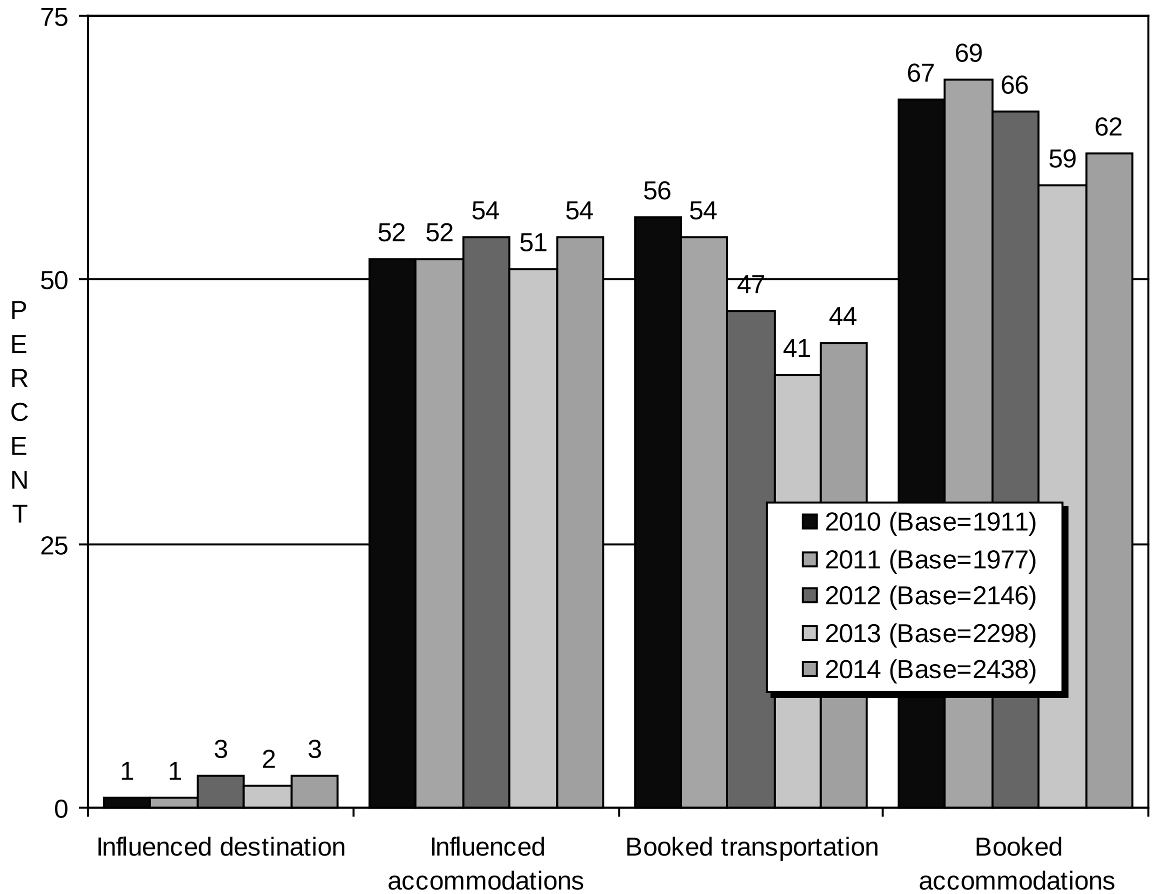
FIGURE 21
Whether Used The Internet To Plan Trip*



Visitors were asked if they used the Internet to plan their trip, and 68% said yes, up significantly from 53% in 2010, 55% in 2011, 60% in 2012, and 64% last year (Figure 21).

* Only “yes” responses are reported in this chart.

FIGURE 22
Internet Influence And Use*
(Among Those Who Used The Internet To Plan Trip)



Among visitors who used the Internet to plan their trip to Las Vegas, 44% said they booked their transportation online, down significantly from 2010 – 2012 results (Figure 22). Sixty-two percent (62%) said they booked their accommodations online, also down significantly from 2010 – 2012 results. Just over one-half (54%) said the Internet influenced their choice of accommodations, up from 51% last year. Three percent (3%) said the Internet influenced their decision to visit Las Vegas, up from 1% each in 2010 and 2011 and 2% last year.

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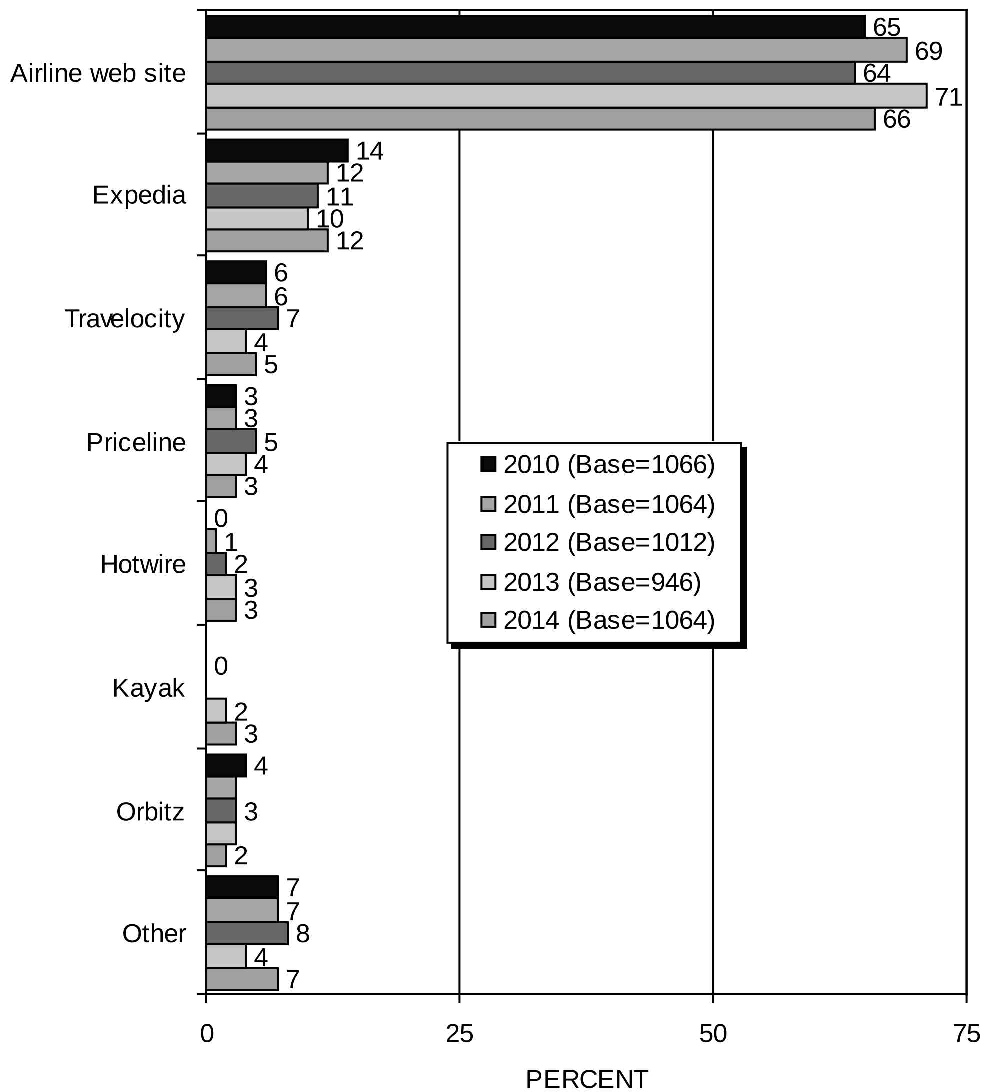
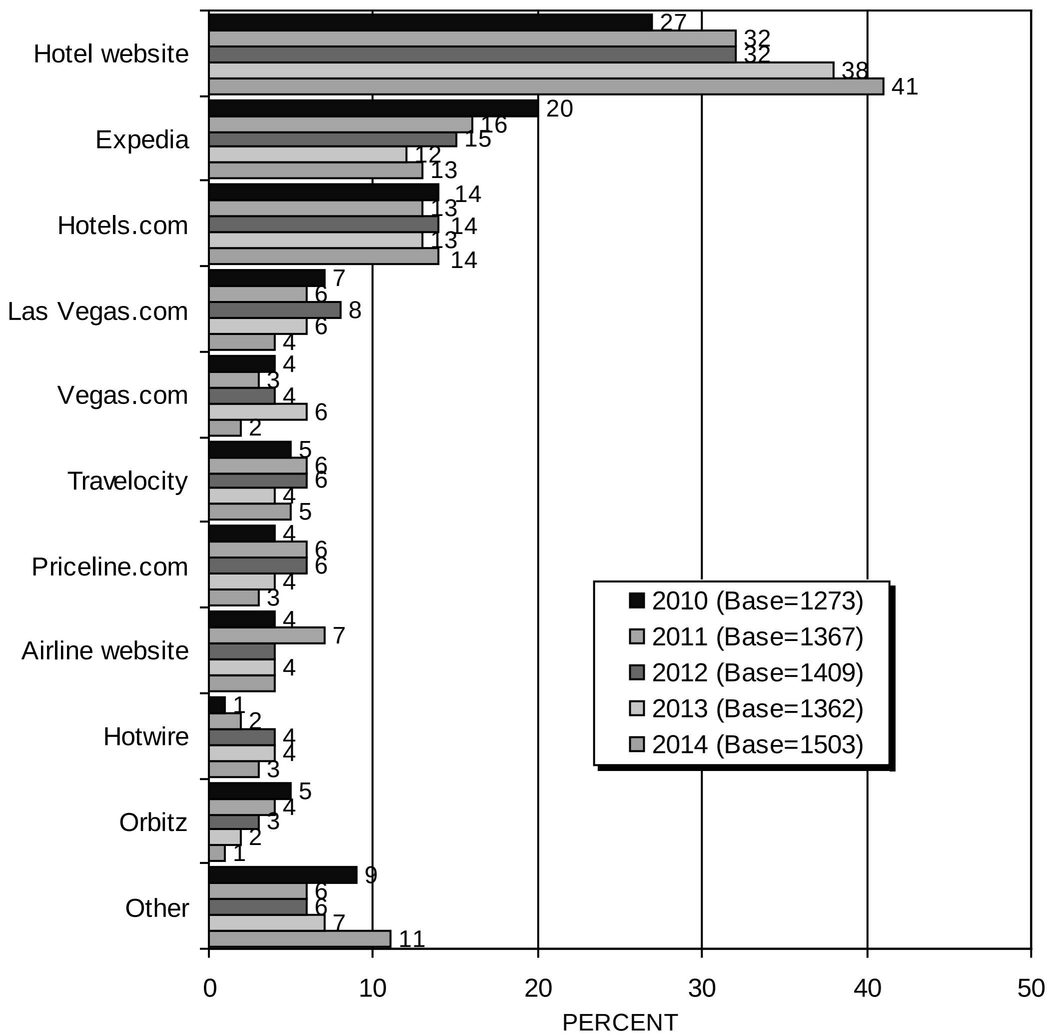
* Only "yes" responses are reported in this chart.

FIGURE 23
Website Used To Book Transportation
(Among Those Who Booked Their
Transportation To Las Vegas Online)



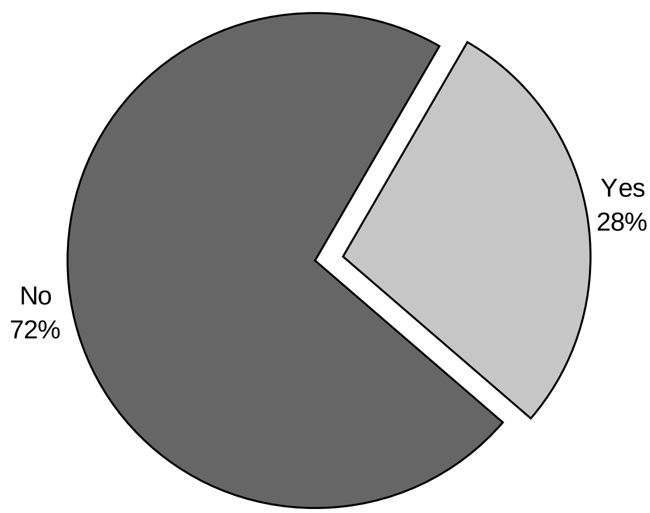
Among those who booked their transportation to Las Vegas online, two-thirds (66%) said they used an airline website, down significantly from 71% last year (Figure 23). Twelve percent (12%) said they used Expedia, down significantly from 14% in 2010. Five percent (5%) used Travelocity (down from 7% in 2012), 3% each used Priceline (down from 5% in 2012), Hotwire (up from 2010 – 2011 readings) or Kayak, and 2% used Orbitz (down from 4% in 2010).

FIGURE 24
Website Used To Book Accommodations
(Among Those Who Booked Their
Accommodations In Las Vegas Online)



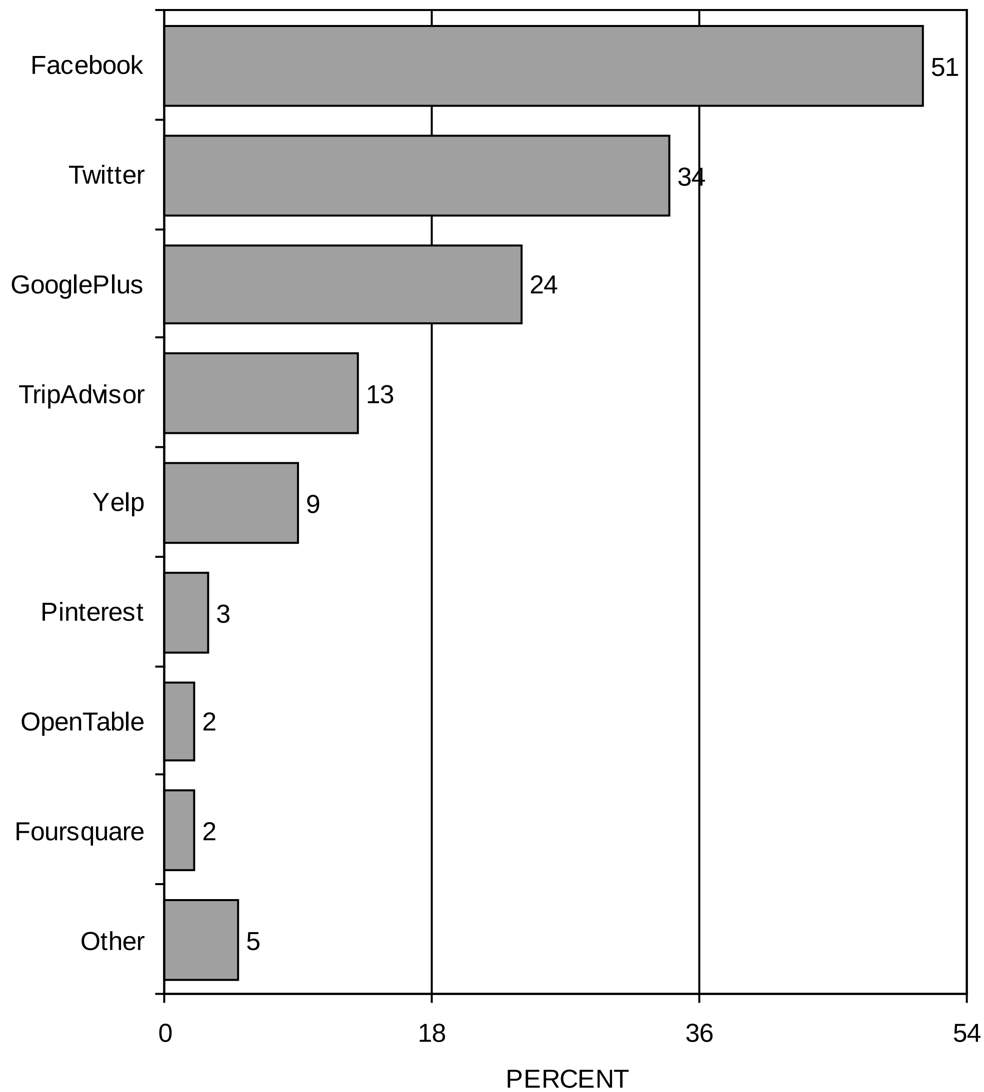
Among those who booked their accommodations online for their current trip to Las Vegas, 41% said they used a hotel website, up from 27% in 2010, and 32% each in 2011 and 2012 (Figure 24). Fourteen percent (14%) used Hotels.com, while 13% used Expedia (down significantly from 20% in 2010, and 16% in 2011). Five percent (5%) used Travelocity, 4% each used LasVegas.com (down significantly from 7% in 2010 and 8% in 2012) or an airline website (down from 7% in 2011), 3% each used Hotwire.com (up from 1% in 2010), or Priceline.com (down from 6% each in 2011 and 2012), while the remaining visitors used a variety of other websites.

FIGURE 25
Whether Used Social Media Apps Or Web Sites To Plan Activities During Their Stay In Las Vegas



Beginning in 2014, visitors were asked if they used any social media web sites, such as Facebook, Twitter, or others during their visit to plan their activities in Las Vegas. Twenty-eight percent (28%) of visitors said they had (Figure 25).

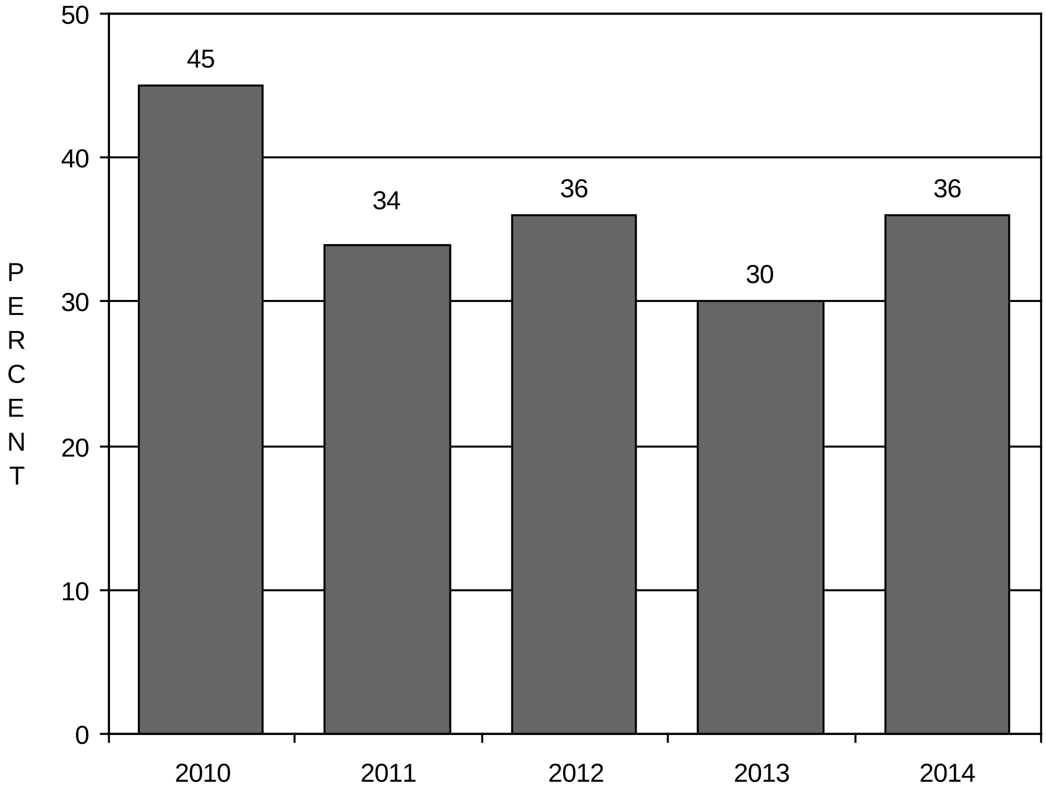
FIGURE 26
Social Media Apps Or Websites Used To Plan Activities In Las Vegas
(Among Those Who Used Social Media Apps Or Websites To Plan
Their Activities While In Las Vegas)



(Base=1004)

Among those who used social media websites during their visit to plan their activities in Las Vegas, just over one-half (51%) said they used Facebook (Figure 26). About one-third (34%) said they used Twitter, 24% used GooglePlus, 13% used TripAdvisor, 9% used Yelp, 3% Pinterest, and 2% each used Foursquare and OpenTable.

FIGURE 27
Whether Visited Downtown Las Vegas*



Thirty-six percent (36%) of visitors said they had visited Downtown Las Vegas on their current trip, down significantly from 45% in 2010, but up from 34% in 2011 and 30% last year (Figure 27).

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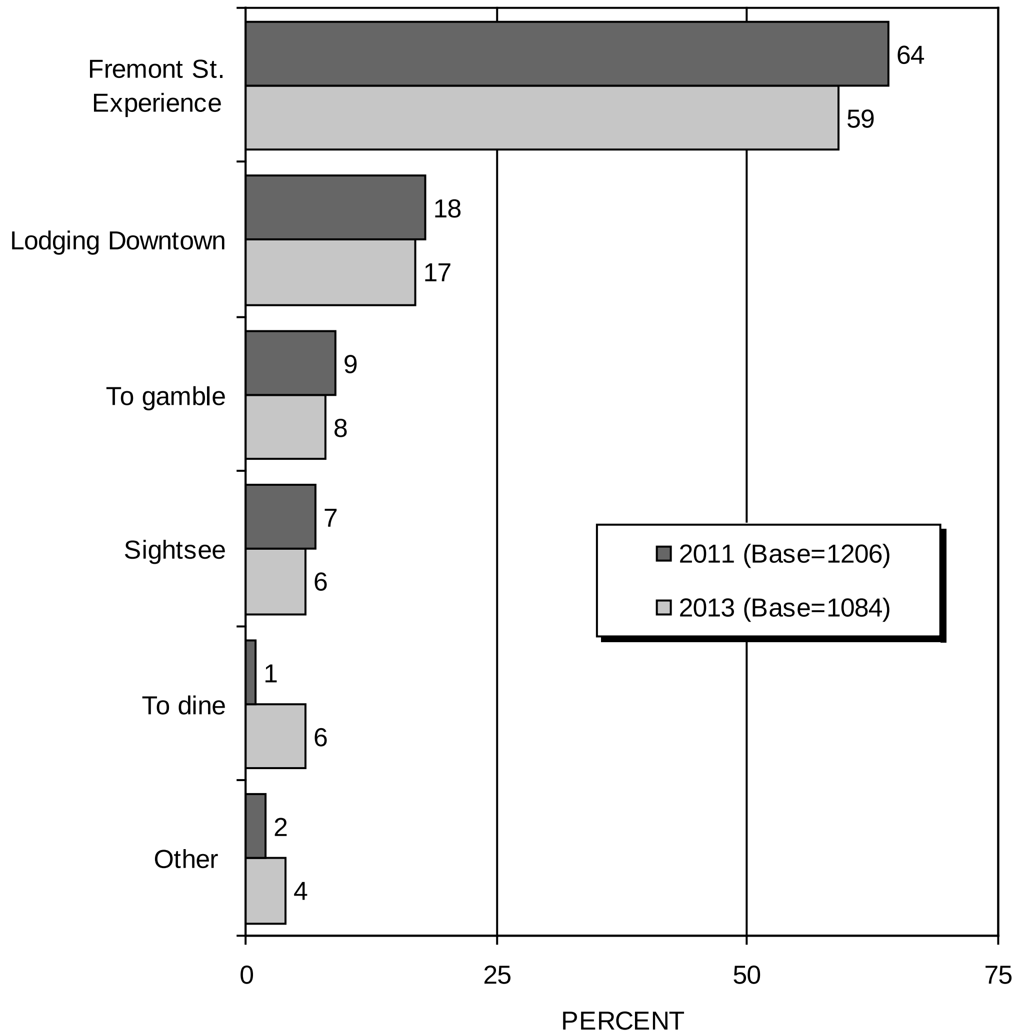
* Only “yes” responses are reported in this chart.

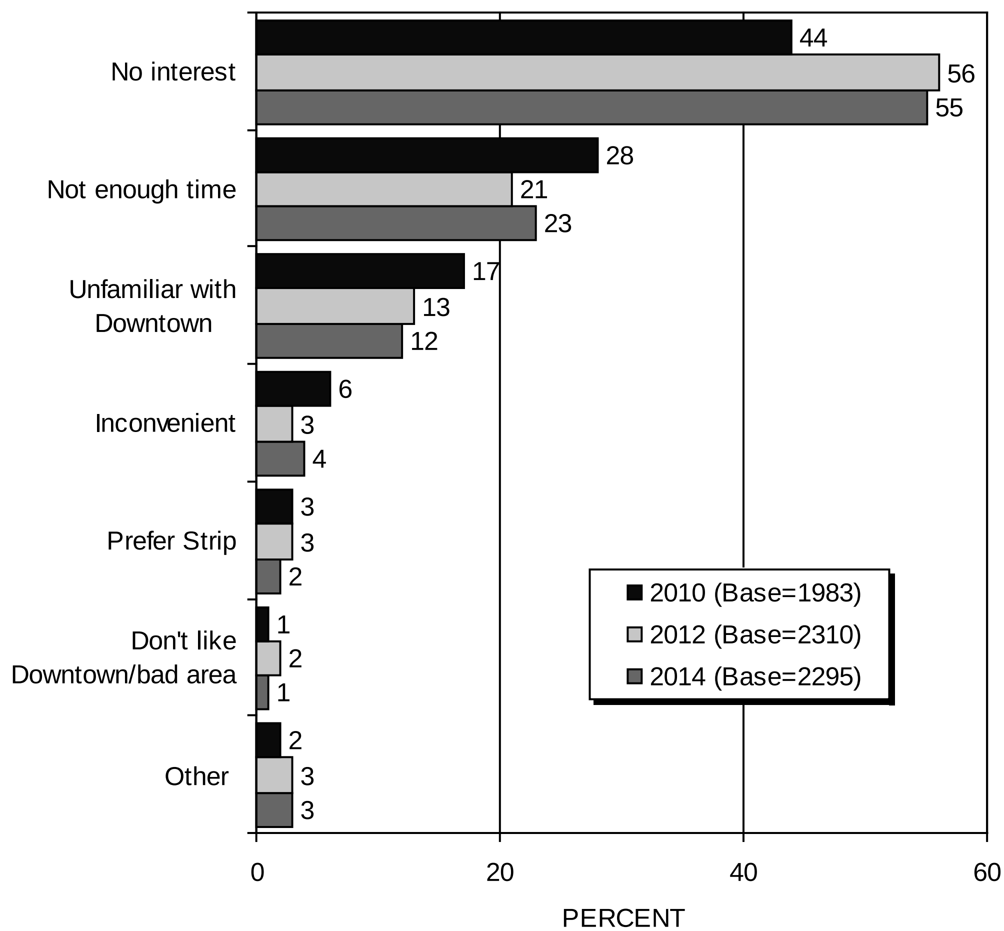
FIGURE 28
Main Reason For Visiting Downtown Las Vegas*
(Among Those Who Visited Downtown — Asked Every Other Year)



Visitors who visited Downtown Las Vegas on their current trip were asked the primary reason why they had done so (Figure 28). Nearly six in ten (59%) said it was to see the Fremont Street Experience. Seventeen percent (17%) said they were lodging Downtown, 8% said they went Downtown primarily to gamble, and 6% said they visited Downtown primarily to sightsee. The number who said they visited Downtown to dine was 6% (up significantly from 1% in 2011).

* This question is asked every other year and was not asked in 2010, 2012, or 2014.

FIGURE 29
Main Reason For Not Visiting Downtown Las Vegas*
(Among Those Who Did Not Visit Downtown —
Asked Every Other Year)



Visitors who had not visited Downtown Las Vegas on their current trip were asked the primary reason why they had not done so (Figure 29). More than one-half (55%) said it was because they were not interested in Downtown, up from 44% in 2010. Twenty-three percent (23%) said it was because they did not have enough time (down from 28% in 2010), while 12% said they were unfamiliar with Downtown (down from 17% in 2010). Four percent (4%) said they did not go Downtown because it was inconvenient (down from 6% in 2010), and 2% said they prefer the Strip area.

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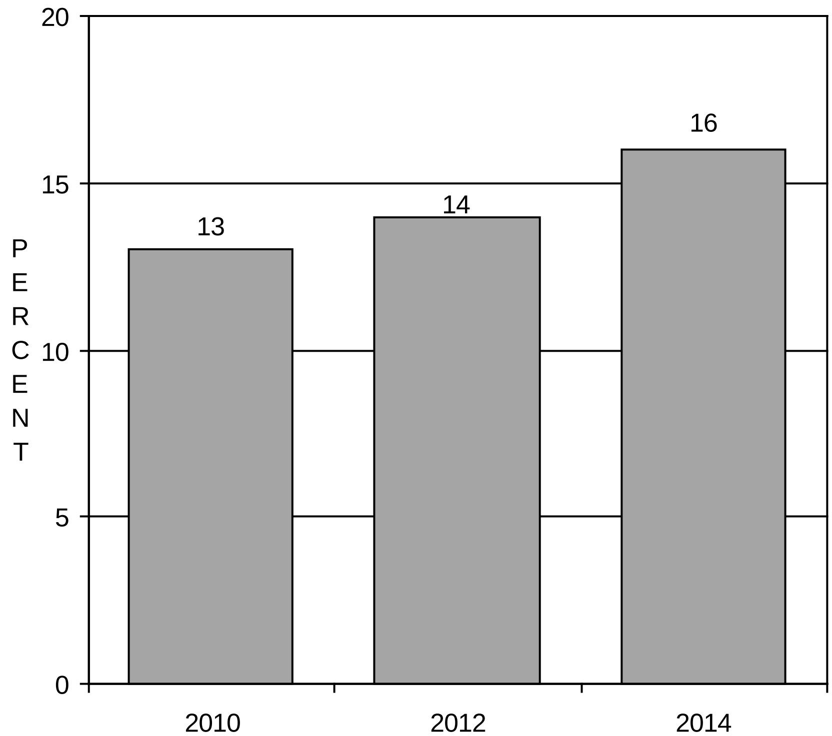
* This question is asked every other year and was not asked in 2011 or 2013.

FIGURE 30
Visits To Nearby Places*
(Asked Every Other Year)

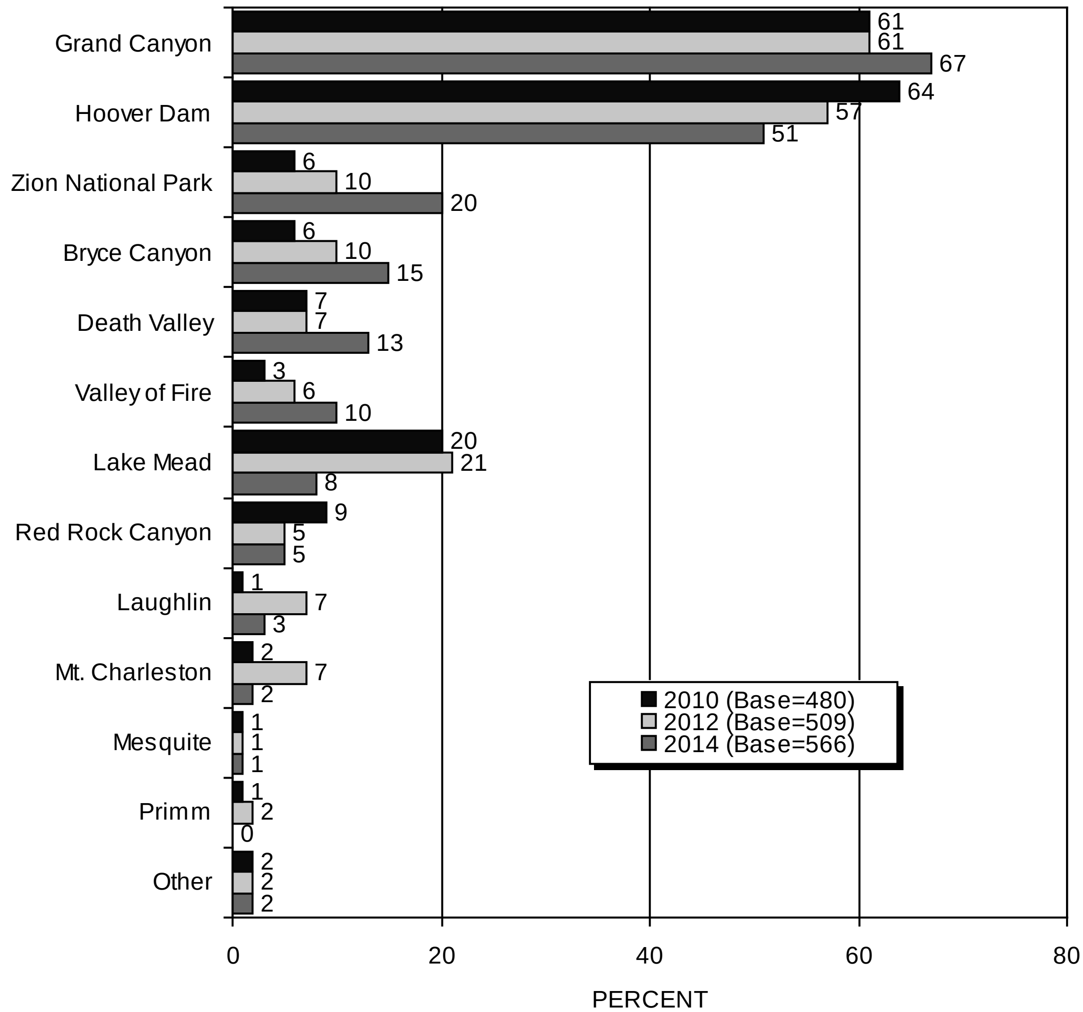


Visitors were asked if they visited any nearby places before or after their trip to Las Vegas (Figure 30) and 16% said they had, up from 13% in 2010.

* Only "yes" responses are reported in this chart.

This question is asked every other year and was not asked in 2011 or 2013.

FIGURE 31
Other Nearby Places Visited*
(Among Those Who Planned to Visit Other Places – Asked Every Other Year)



Visitors were asked what other nearby destinations they had visited, or planned to visit (Figure 31). In 2014, visitors were most likely to say the Grand Canyon (67%), Hoover Dam (51%, down from 64% in 2010), and Zion National Park (20%, up from 6% in 2010 and 10% in 2012). Fifteen percent (15%) said Bryce Canyon (up from 6% in 2010 and 10% in 2012), while 13% said Death Valley (up from 7% each in 2010 and 2012), and 10% mentioned Valley of Fire (up from 3% in 2010 and 6% in 2012). Eight percent (8%) visited Lake Mead (down from 20% in 2010 and 21% in 2012), 5% visited Red Rock, 3% Laughlin (down from 7% in 2012), and 2% Mt. Charleston (down from 7% in 2012).

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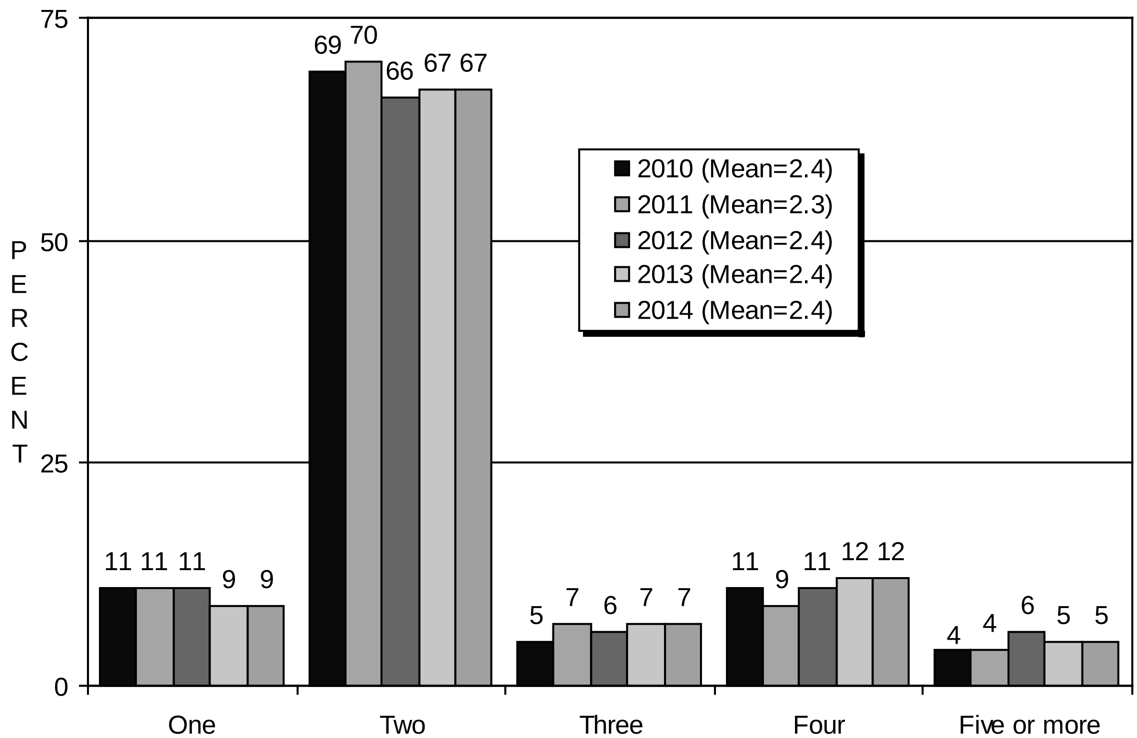
* Multiple responses were permitted.

This question is asked every other year and was not asked in 2011 or 2013.

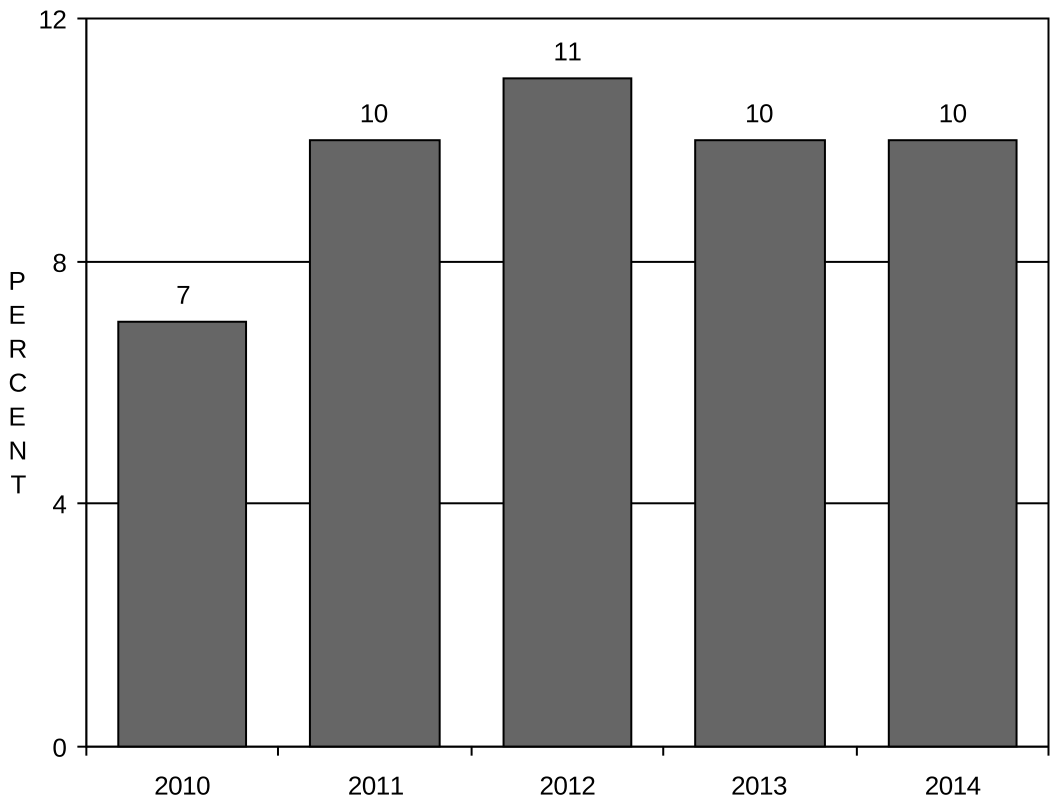
TRIP CHARACTERISTICS AND EXPENDITURES

FIGURE 32
Adults In Immediate Party



Two-thirds (67%) of visitors traveled in parties of two, not significantly different from past results (Figure 32). Seven percent (7%) said they were in a party of three (up from 5% in 2010), while 12% were in a party of four (up from 9% in 2011), and 5% were in a party of five or more (down from 6% in 2012). Nine percent (9%) of visitors traveled alone, down from 11% each from 2010 – 2012. The average party size in 2014 was 2.4 persons, up significantly from 2.3 in 2011.

FIGURE 33
Whether Had Persons In Immediate Party Under Age 21*
(Among All Visitors)



We asked visitors whether they had any people under the age of 21 traveling with them in their immediate party (Figure 33). Ten percent (10%) said they did, up significantly from 7% in 2010.

* Only "yes" responses are reported in this chart.

FIGURE 34
Nights Stayed*

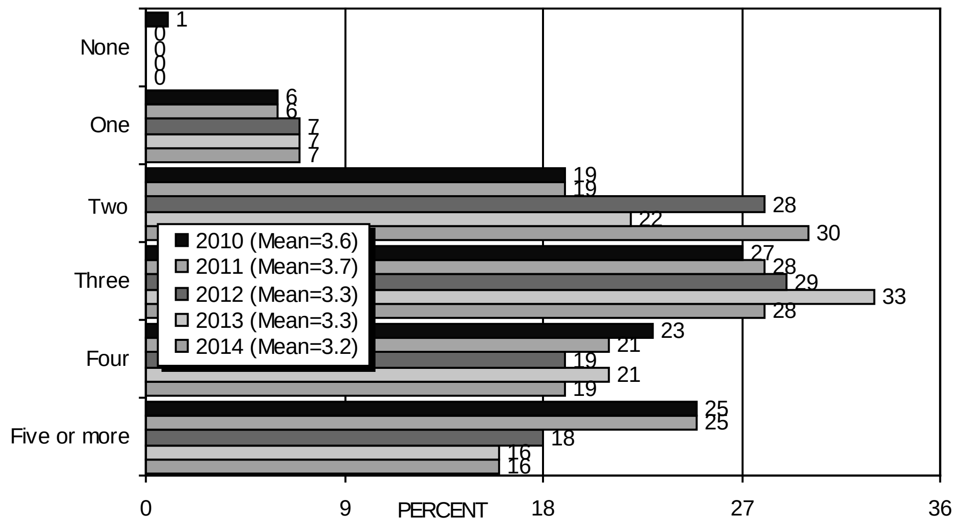
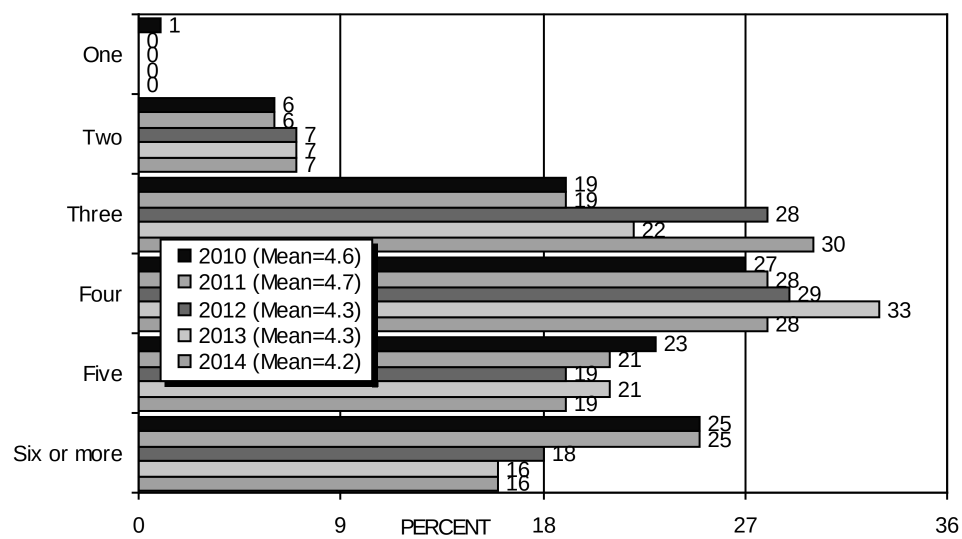


FIGURE 35
Days Stayed



In 2014, visitors stayed an average of 3.2 nights and 4.2 days in Las Vegas — down significantly from 3.6 nights and 4.6 days in 2010, and 3.7 nights and 4.7 days in 2011 (Figures 34 and 35).

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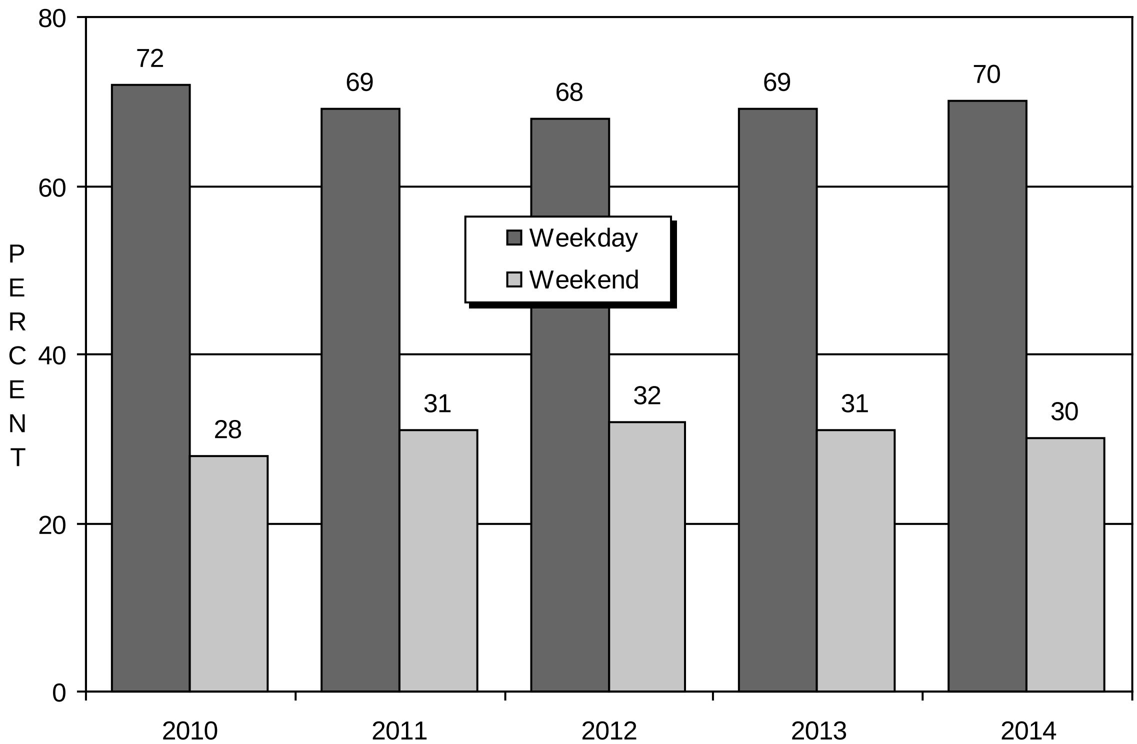
* Some changes in 2012 and 2013 data results may in part be due to updated methodology.

FIGURE 36
Weekend Versus Weekday Arrival*



Thirty percent (30%) of visitors arrived in Las Vegas on a weekend (down significantly from 32% in 2012), while 70% arrived on a weekday (up from 68% in 2012) (Figure 36).

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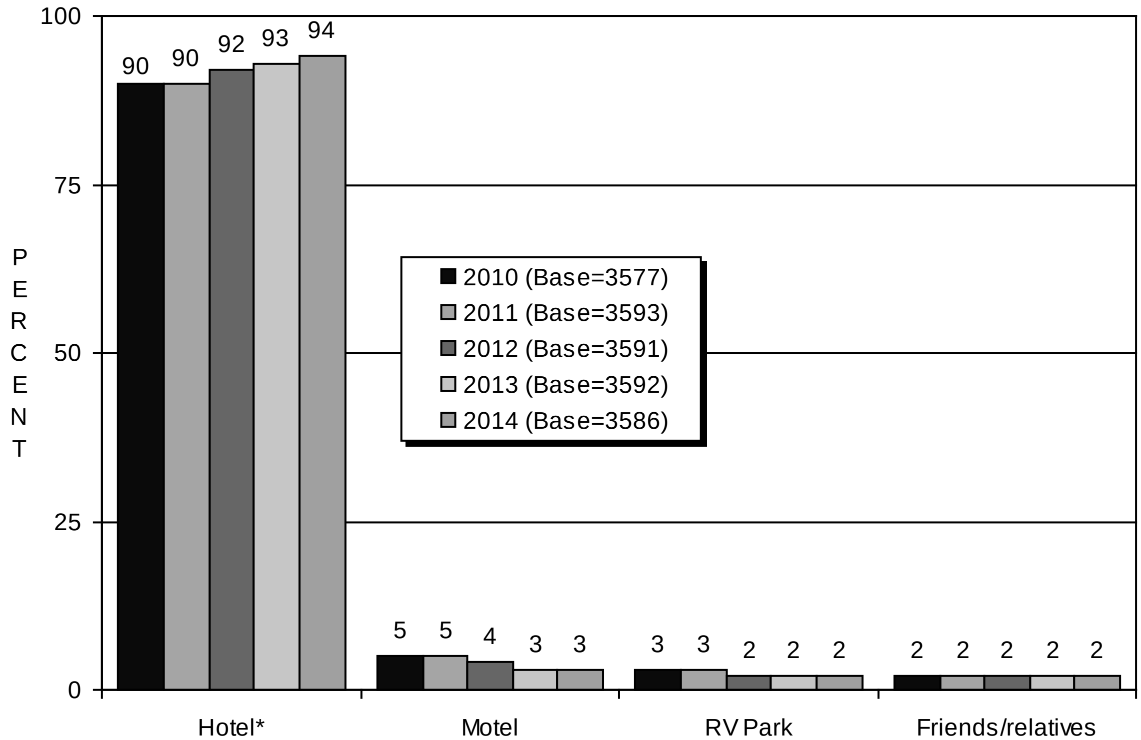
* *Weekday* is defined as Sunday through Thursday. *Weekend* is defined as Friday and Saturday.

FIGURE 37
Type Of Lodging
(Among Those Who Stayed Overnight)



Among visitors who stayed in Las Vegas overnight, 94% stayed in a hotel (up from 90% each in 2010 and 2011 and 92% in 2012), while 3% stayed in a motel (down from 5% each in 2010 and 2011 and 4% in 2012). Two percent (2%) stayed in an RV park (down from 3% each in 2010 and 2011), and the remaining 2% stayed with friends or relatives (Figure 37).

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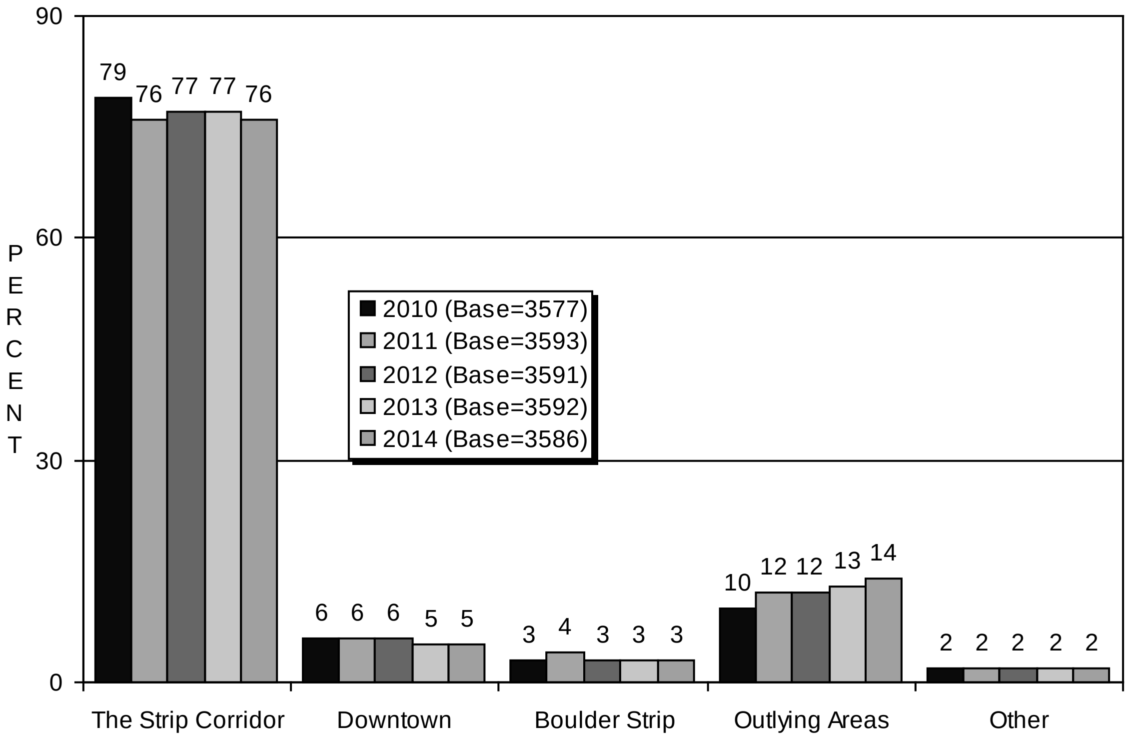
* Includes respondents who stayed in a time share.

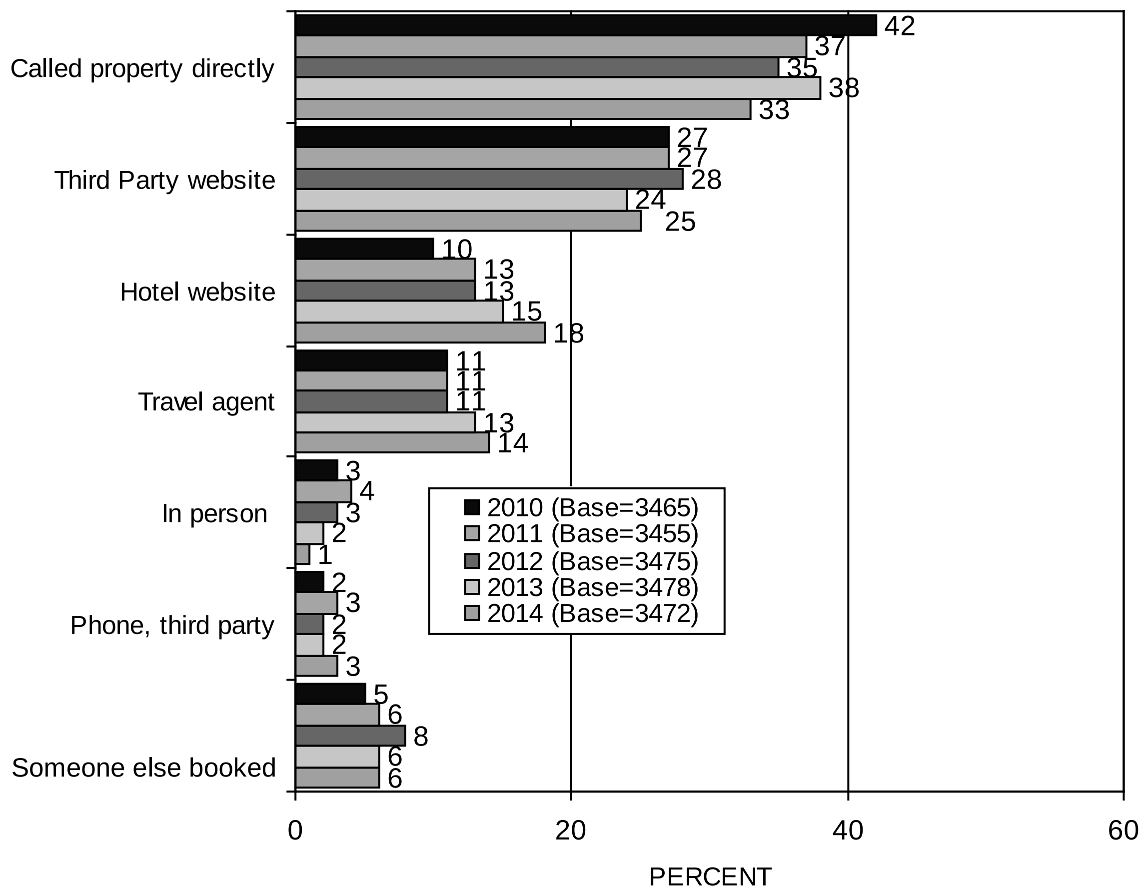
FIGURE 38
Location Of Lodging
(Among Those Who Stayed Overnight)



In terms of lodging location (among those who stayed overnight), 76% stayed in a property on the Strip Corridor*, 5% stayed Downtown, and 3% stayed on the Boulder Strip. Fourteen percent (14%) stayed in outlying parts of Las Vegas (up from 10% in 2010), and 2% stayed in other areas (Figure 38).

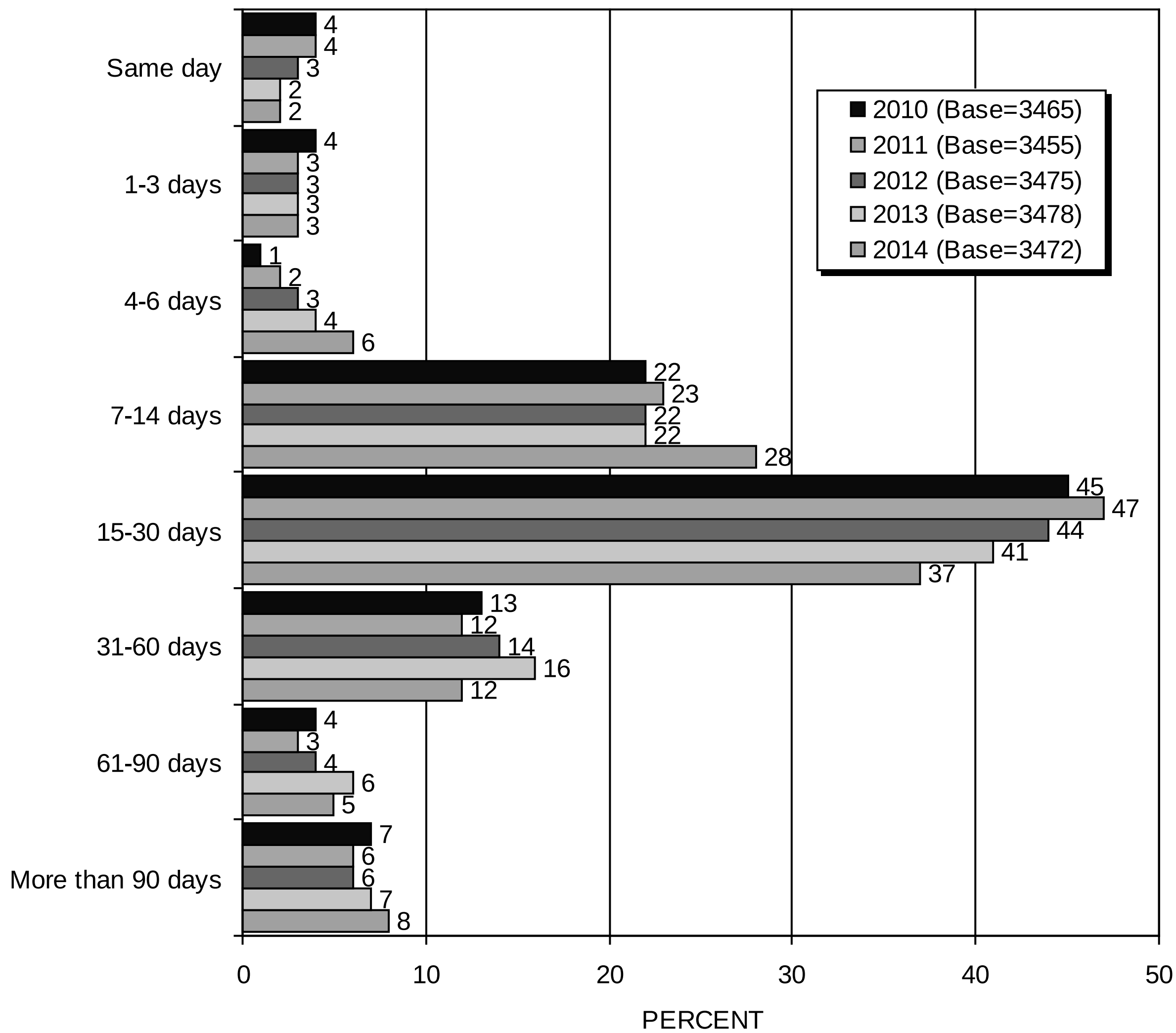
* The Strip Corridor includes properties located directly on Las Vegas Boulevard South, as well as properties near the Strip, between Valley View Road and Paradise Road.

FIGURE 39
How Booked Accommodations In Las Vegas
(Among Those Who Stayed In A Hotel/Motel/RV Park)



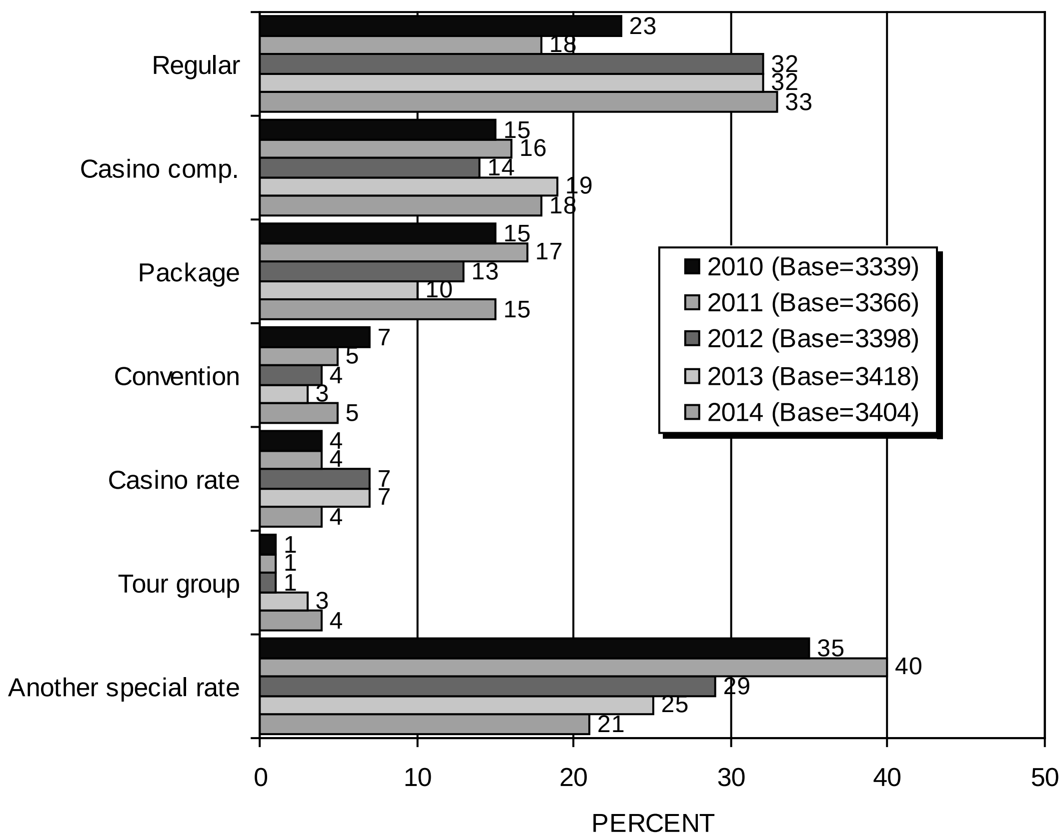
Visitors who stayed at a hotel, motel, or RV park were asked how they booked their accommodations in Las Vegas (Figure 39). In 2014, 43% overall aid they used a website. One-quarter (25%) said they used a third party website, while 18% said they used a hotel website (up significantly from 2010 – 2013 results). One-third (33%) said they called the hotel, motel, or RV park directly (down significantly from past results). Fourteen percent (14%) said they booked through a travel agent, up from 11% each from 2010 – 2012. Three percent said they booked by phone through a third party (but not a travel agent), up from 2% each in 2010, 2012, and 2013, and 1% said they booked in person (down from prior years).

FIGURE 40
Advance Booking Of Accommodations
(Among Those Who Stayed In A Hotel/Motel/RV Park)



We asked those staying in a hotel, motel, or RV park how far in advance they had booked their accommodations (Figure 40). Sixty-five percent (65%) of these visitors booked one week to one month in advance, down from 67% in 2010, and 70% in 2011. Twenty-five percent (25%) booked more than a month in advance, up significantly from 21% in 2011, but down from 29% last year. Eleven percent (11%) reported making their reservations less than one week before arrival, up from 9% each in 2010, 2011, and last year.

FIGURE 41
Type Of Room Rates
(Among Those Staying In A Hotel Or Motel)



Visitors staying in a hotel or motel were shown a card describing various room rates* and were asked which type of room rate they had received (Figure 41). One-third (33%) of these visitors said they paid a regular room rate, up from 23% in 2010, and 18% in 2011. Eighteen percent (18%) received a casino complimentary rate (up from 15% in 2010, 16% in 2011, and 14% in 2012), while 4% paid a casino rate (down from 7% each 2012 and 2013). Fifteen percent (15%) of visitors paid a package rate (up significantly from 10% last year), while 4% received a tour group rate (up significantly from 1% each from 2010 – 2012). Five percent (5%) paid a convention rate (down from 7% in 2010, but up from 3% last year). The remaining 21% paid some other kind of special rate, down significantly from 2010 – 2013 readings.

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* For an exact description of the room rates as presented to respondents, see "Card A" at the end of the aggregate results in the appendix to this report.

FIGURE 42
2014 Room Rate By Booking Method

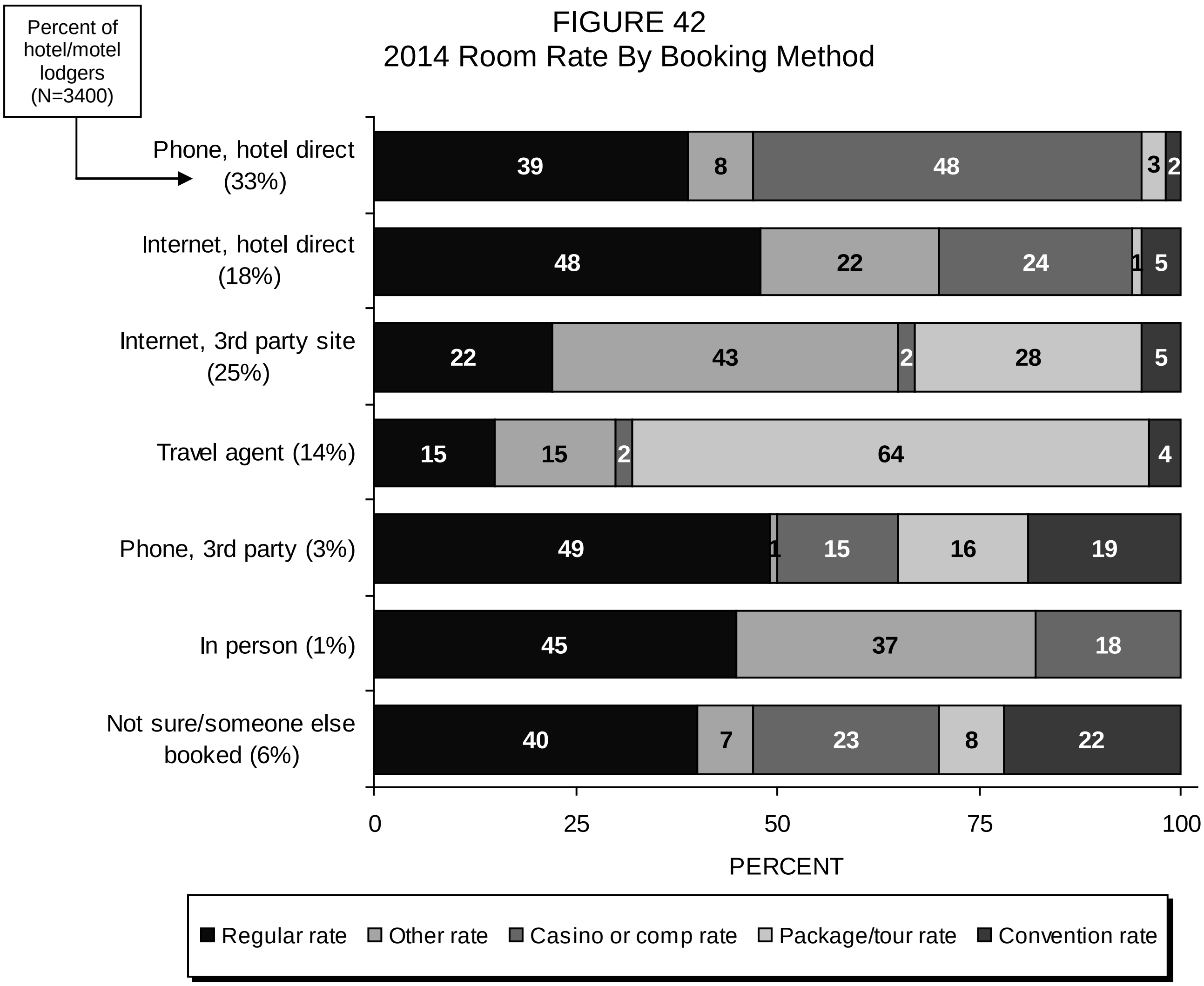
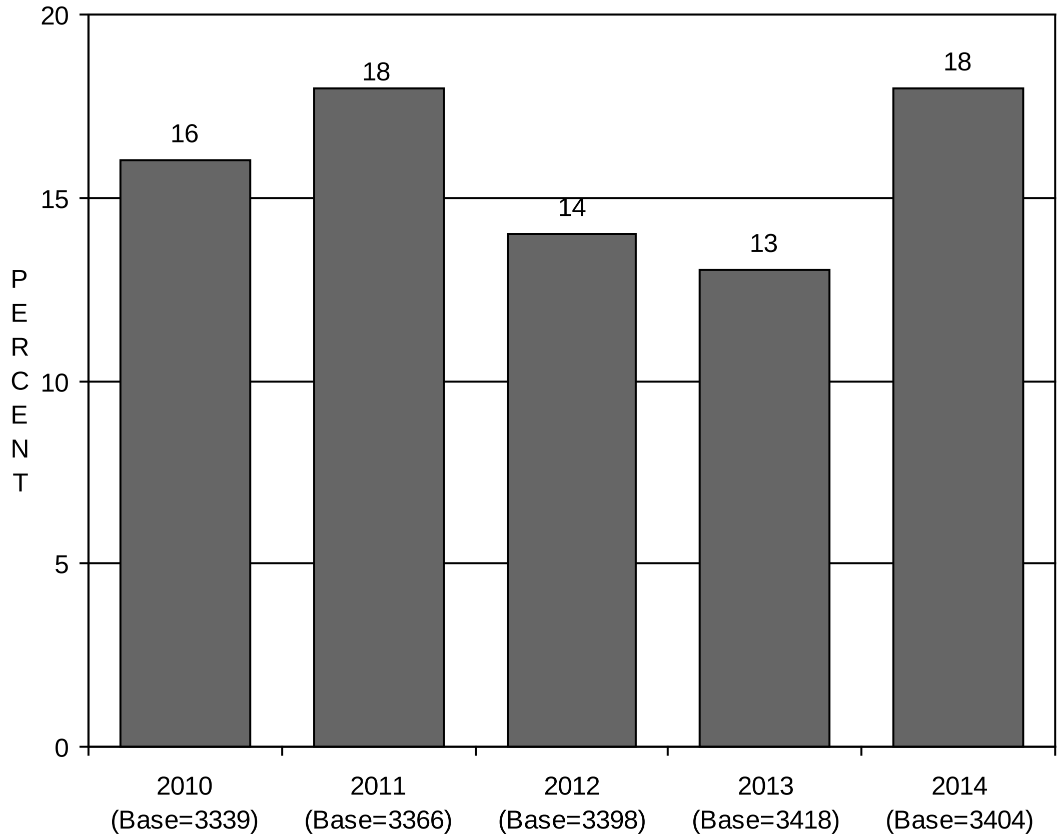


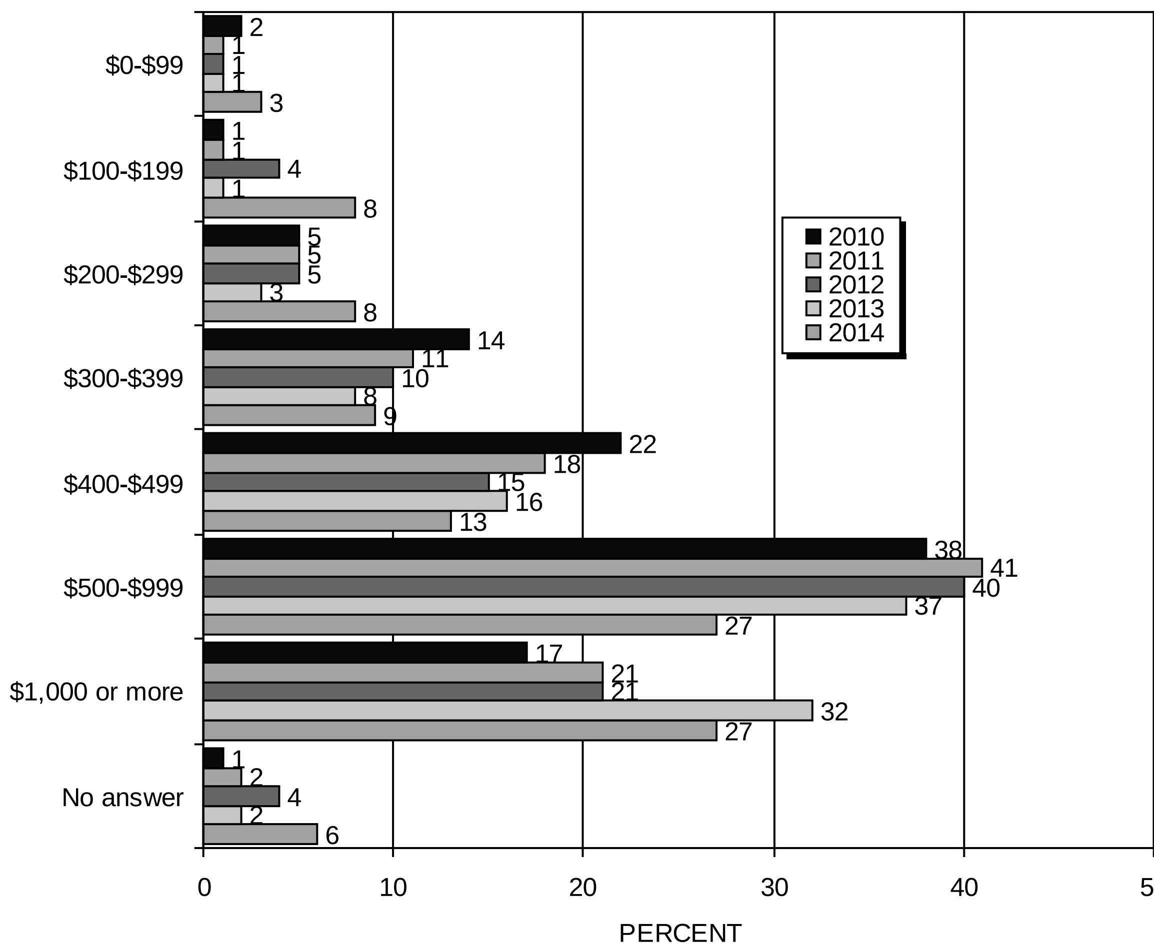
Figure 42 shows the room rate category by the booking method for 2014 among those staying in a hotel or motel. Of those who called the hotel directly, just under one-half (48%) received a casino or casino complimentary rate, while 39% received a regular rate, and 8% received a special rate. Of those who booked their room on the Internet through a third-party site, 43% received a special room rate, 28% received a package rate, and 22% received a regular rate. Among those who booked directly on a hotel website, 48% received a regular room rate, 22% received a special rate, and 24% received a casino or casino complimentary rate. More than six in ten (64%) of those who booked through a travel agent received a package rate, while 15% each received a regular rate or a special rate. Among those who booked in person, 45% received a regular rate, 37% received a special rate, and 18% received a casino or casino complimentary rate. Among those who booked through a third party by phone, 49% received a regular rate, 19% received a convention rate, 16% received a package rate, while 15% received a casino or casino complimentary rate.

FIGURE 43
Package Purchasers
(Among Those Staying In A Hotel Or Motel)



Eighteen percent (18%) of visitors purchased a package deal or were part of a tour group, up significantly from 16% in 2010, 14% in 2012, and 13% last year. (Figure 43).

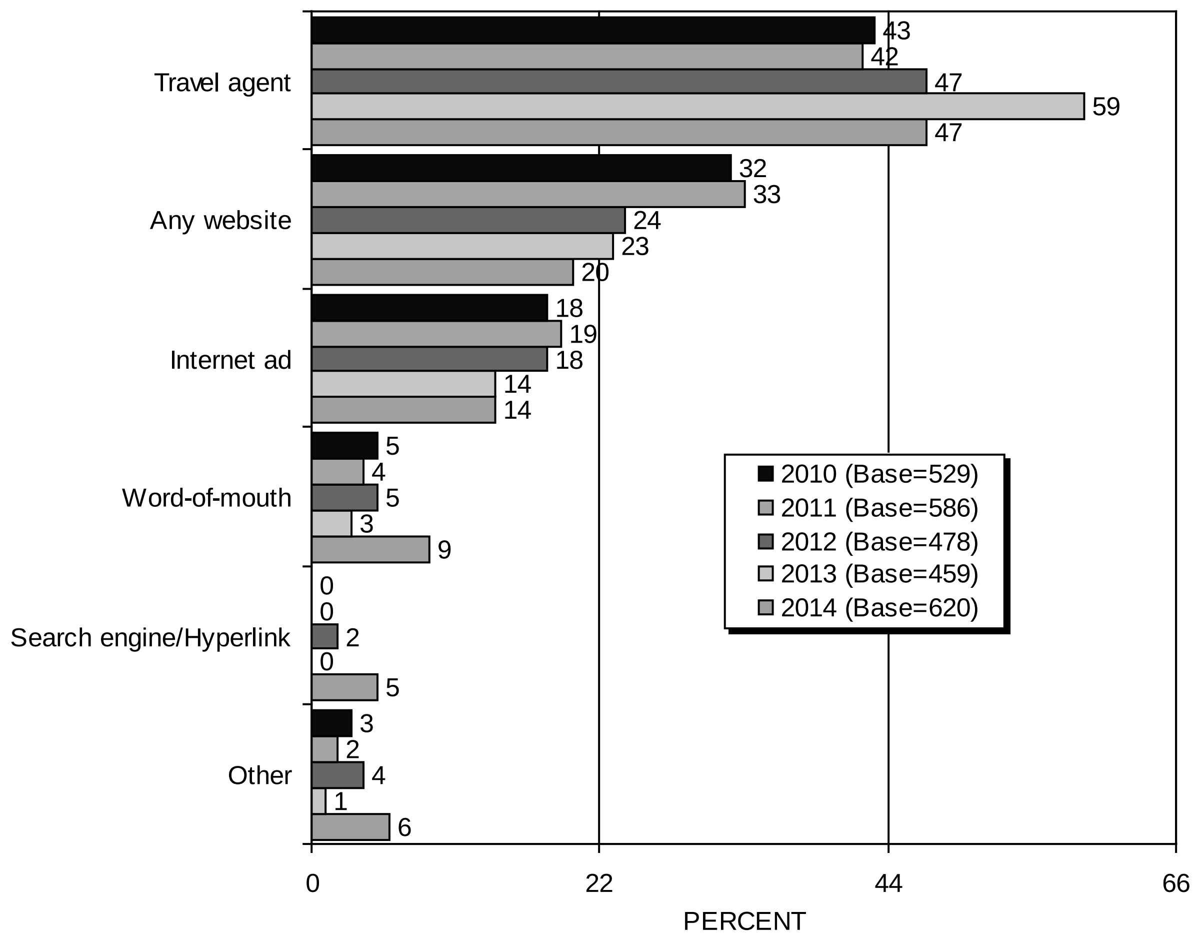
FIGURE 44
Cost Of Package Per Person
(Among Those Who Bought A Package)



Means: 2010=$651.02; 2011=$757.83; 2012=$743.65; 2013=$868.24; 2014=$815.14
Base Sizes: 2010=529; 2011=586; 2012=478; 2013=459; 2014=620

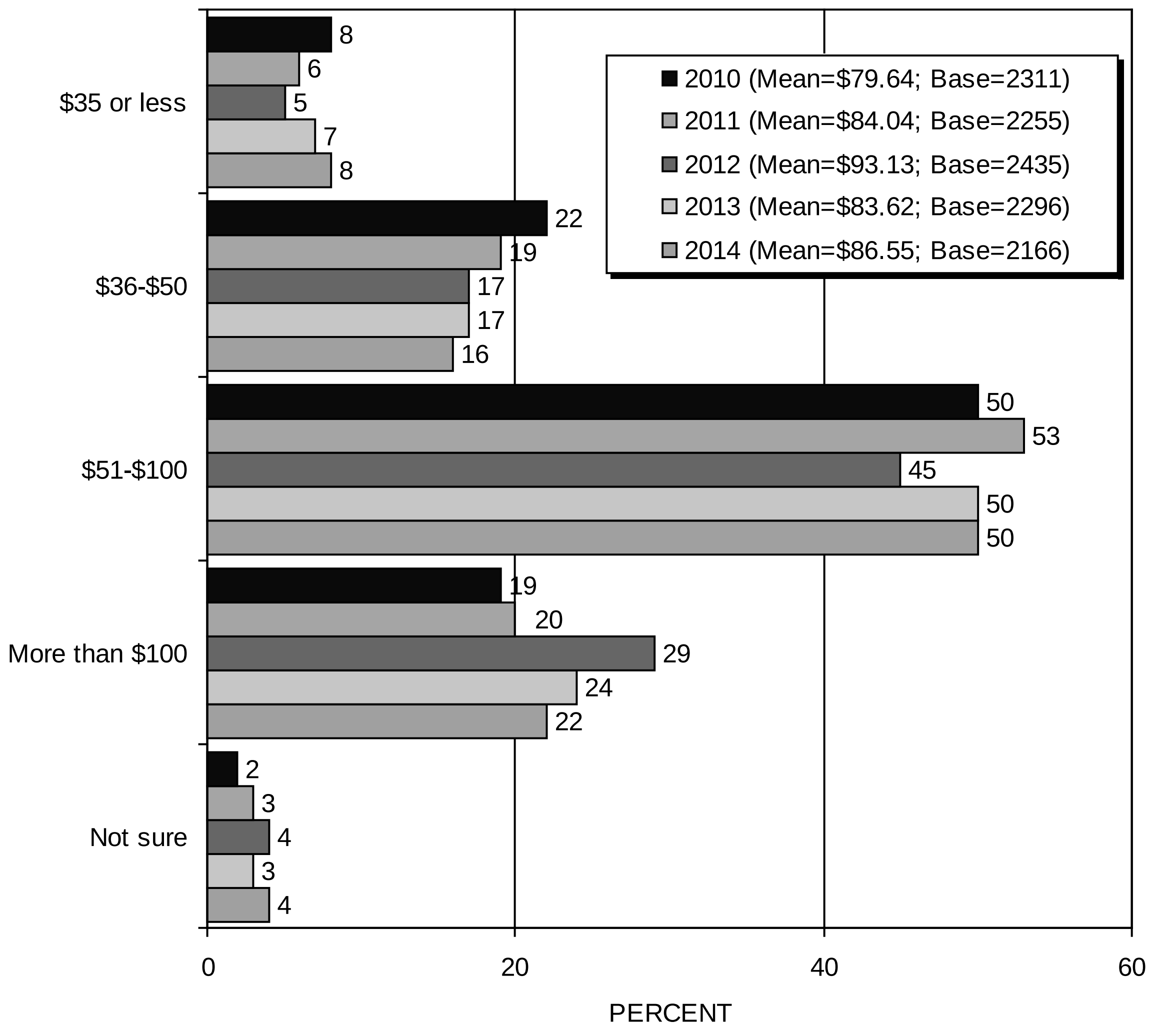
We asked those who had purchased a hotel, airline, or a tour/travel group package how much their packages cost per person (Figure 44). The average cost of such a package in 2014 was $815.14, up significantly from $651.02 in 2010, and $743.65 in 2012.

FIGURE 45
Where First Heard About The Package
(Among Those Who Bought A Package)



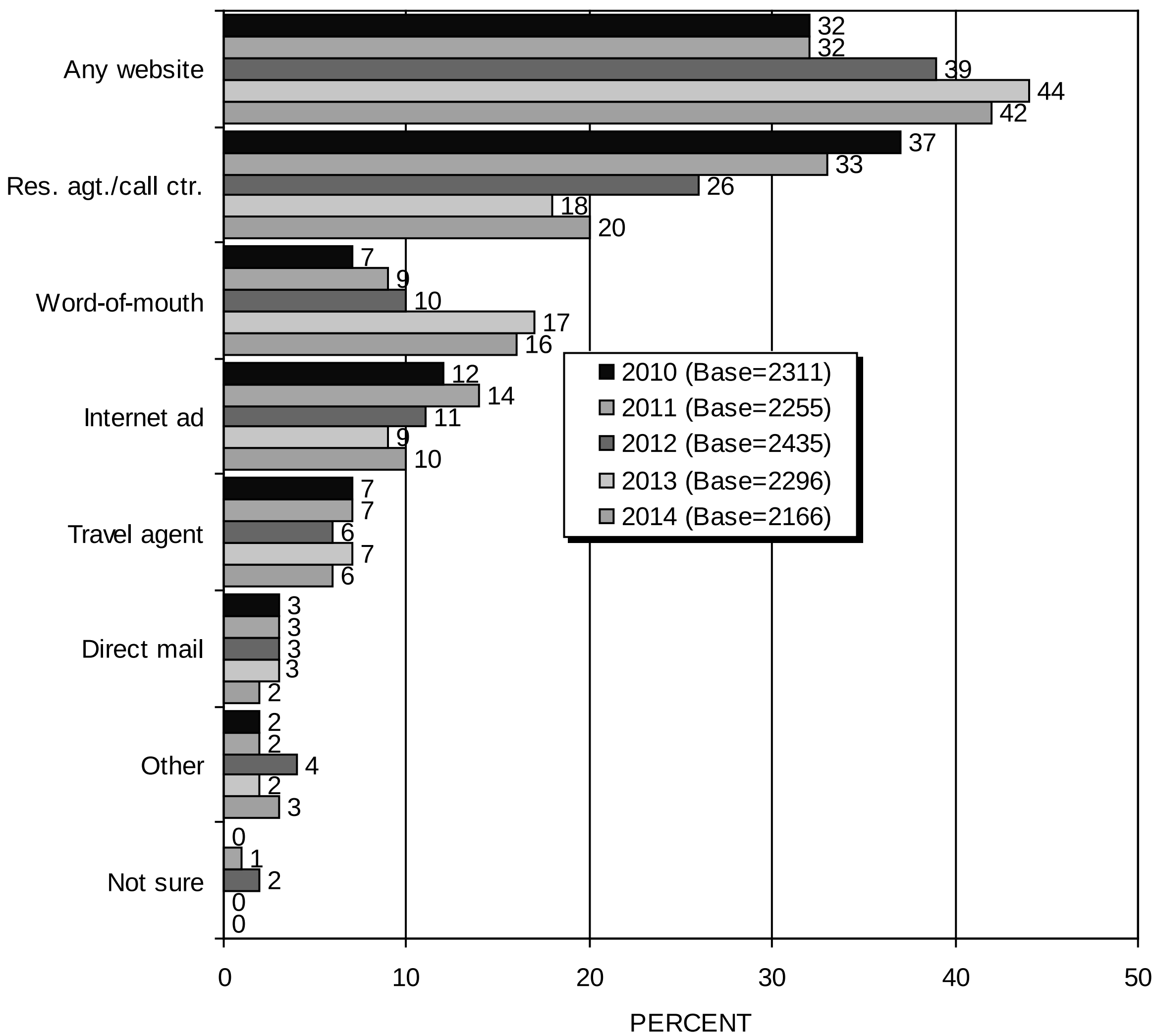
Package purchasers were asked where they first heard about the package they bought (Figure 45), and nearly one-half (47%) said it was from a travel agent, down significantly from 59% last year. Twenty percent (20%) mentioned a website (down from 32% in 2010 and 33% in 2011), while 14% said an Internet ad (down from 19% in 2011), 9% said through word of mouth (up from 2010 – 2013 results), and 5% said it was through a search engine result or a hyperlink, also up from 2010 – 2013 results.

FIGURE 46
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel Or Motel/Non-Package and Non-Comp)



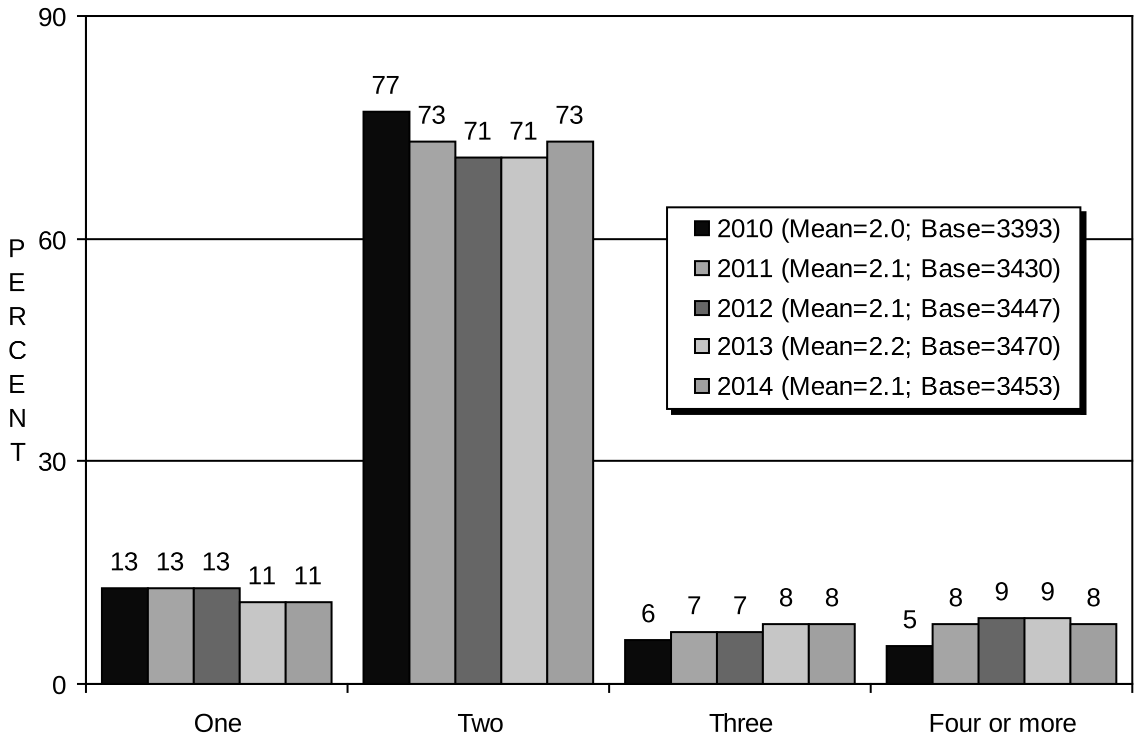
We looked at lodging expenditures among those who did *not* purchase travel packages and were not comped for their stay (Figure 46). One-half (50%) of these non-package visitors paid between $51 and $100 per night for their room, up from 45% in 2012. Twenty-two percent (22%) paid more than $100 per night, down from 29% in 2012, but up from 19% in 2010. Sixteen percent (16%) paid between $36 and $50 (down from 22% in 2010 and 19% in 2011), while 8% paid $35 or less (up from 6% in 2011 and 5% in 2012). The average daily room rate for non-package visitors in 2014 was $86.55, down from $93.13 in 2012, but up from $79.64 in 2010.

FIGURE 47
How First Found Out About Room Rate
(Among Those Staying In A Hotel Or Motel/Non-Package)



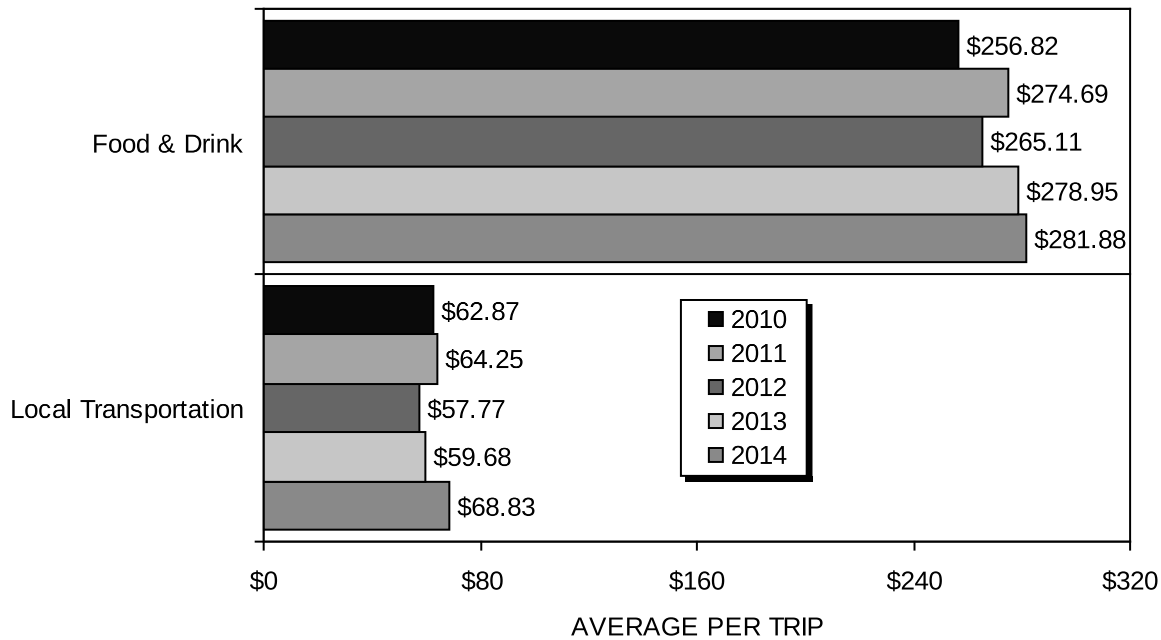
Non-package hotel or motel lodgers were asked how they first found out about the room rate they paid (Figure 47). More than four in ten (42%) mentioned a website, up significantly from 32% each in 2010 and 2011, and 39% in 2012. Twenty percent (20%) said it was through a reservation agent or call center, down significantly from 37% in 2010, 33% in 2011, and 26% in 2012. Sixteen percent (16%) mentioned word-of-mouth (up from 7% in 2010, 9% in 2011, and 10% in 2012), while 10% mentioned an Internet ad (down from 12% in 2010 and 14% in 2011), 6% mentioned a travel agent, and 2% mentioned direct mail.

FIGURE 48
Number Of Room Occupants
(Among Those Staying In A Hotel Or Motel)



As in past years, the majority of visitors who stayed in a hotel or motel (73%, down significantly from 77% in 2010, but up from 71% each in 2012 and 2013) said two people stayed in their room (Figure 48). Eleven percent (11%) said they were lodging alone (down from 13% each from 2010 – 2012), 8% said three people stayed in their room (up from 6% in 2010), while 8% said four or more people stayed in their room (up from 5% in 2010, but down from 9% each in 2012 and last year). The mean (average) number of room occupants was 2.1, up from 2.0 in 2010.

FIGURE 49
Average Trip Expenditures On Food & Drink —
And On Local Transportation*
(Including Visitors Who Spent Nothing In That Category)



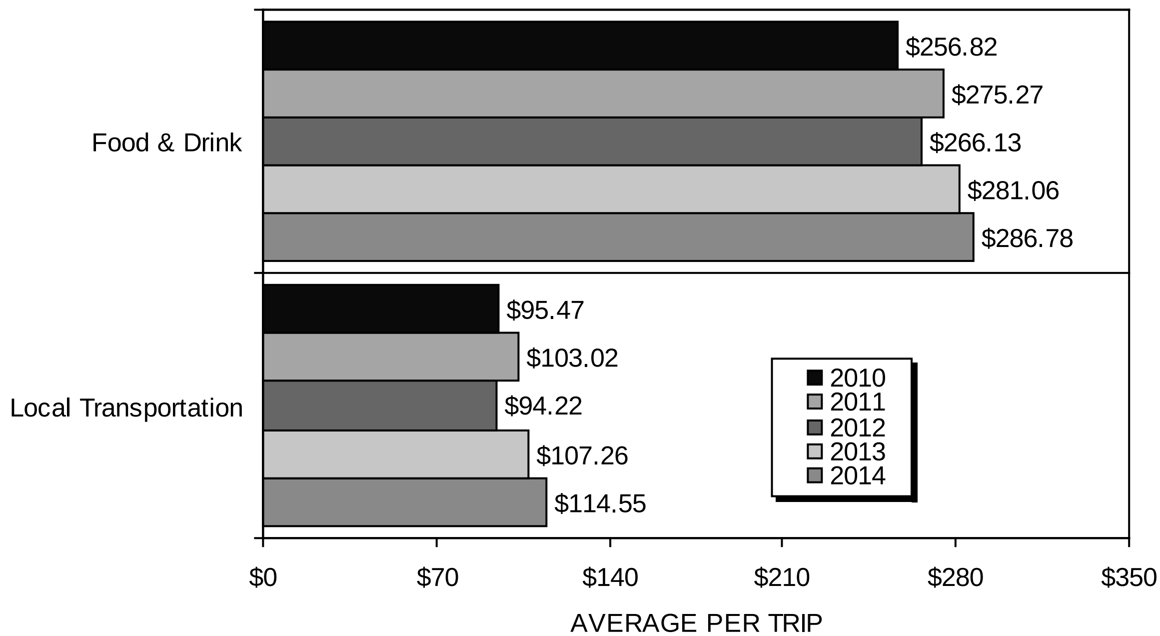
We asked all visitors about their daily expenditures on food and drink and on local transportation.

Figure 49 shows the average *trip* expenditures on food and drink and on local transportation *including visitors who said they spent nothing in that category*. The average expenditure on food and drink in 2014 was $281.88, up significantly from $256.82 in 2010, and $265.11 in 2012.

The average transportation expenditure for 2014 was $68.83, up significantly from $62.87 in 2010, $57.77 in 2012, and $59.68 last year.

* Trip expenditures are calculated by multiplying respondents' estimated daily expenditures by the number of days they had spent in Las Vegas on their most recent trip.

FIGURE 50
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Among Those Who Spent Money In That Category*)



Among visitors who actually spent money in these categories, the average trip expenditure on food and drink in 2014 was $286.78, up significantly from $256.82 in 2010, $275.27 in 2011, and $266.13 in 2012 (Figure 50). The average trip expenditure on local transportation for 2014 was $114.55, up significantly from $95.47 in 2010, $103.02 in 2011, $94.22 in 2012, and $107.26 last year.

† Percentages of respondents who spent money in each category are shown in the following table:

	2010	2011	2012	2013	2014
Food and Drink					
Base size	(3601)	(3592)	(3588)	(3573)	(3538)
Proportion of total	100.0%	99.8%	99.6%	99.2%	98.3%
Local Transportation					
Base size	(2372)	(2246)	(2209)	(2004)	(2164)
Proportion of total	66%	62%	61%	56%	60%

FIGURE 51
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Including Visitors Who Spent Nothing In That Category)

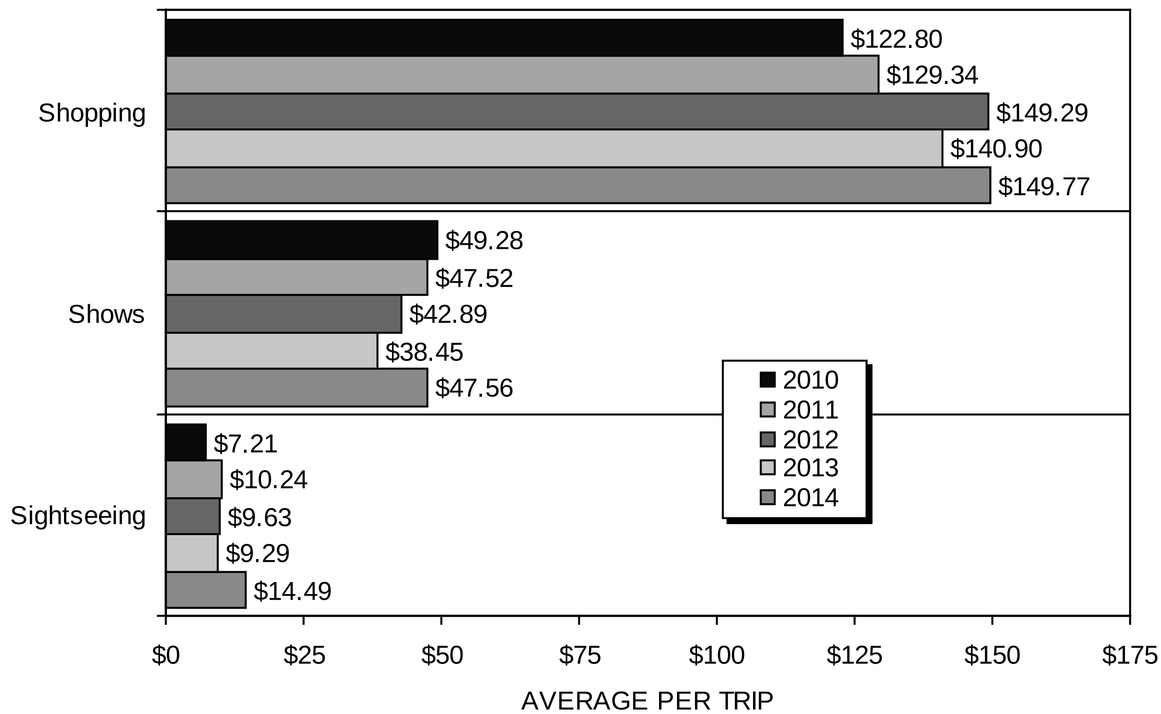
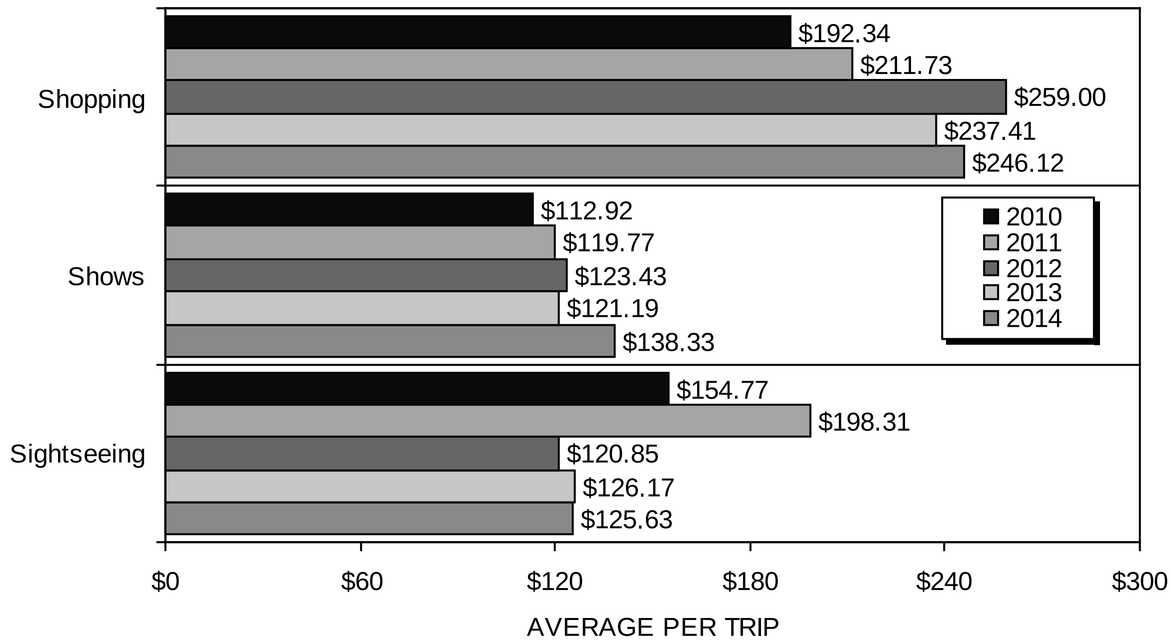


Figure 51 shows average expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas — *including visitors who said they spent nothing* in these categories. The average trip expenditure on shopping was $149.77, up significantly from $122.80 in 2010 and $129.34 in 2011. The average expenditure on shows was $47.56, up from $38.45 last year. The average expenditure on sightseeing was $14.49, up from 2010 – 2013 results.

FIGURE 52
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Among Those Who Spent Money In That Category*)



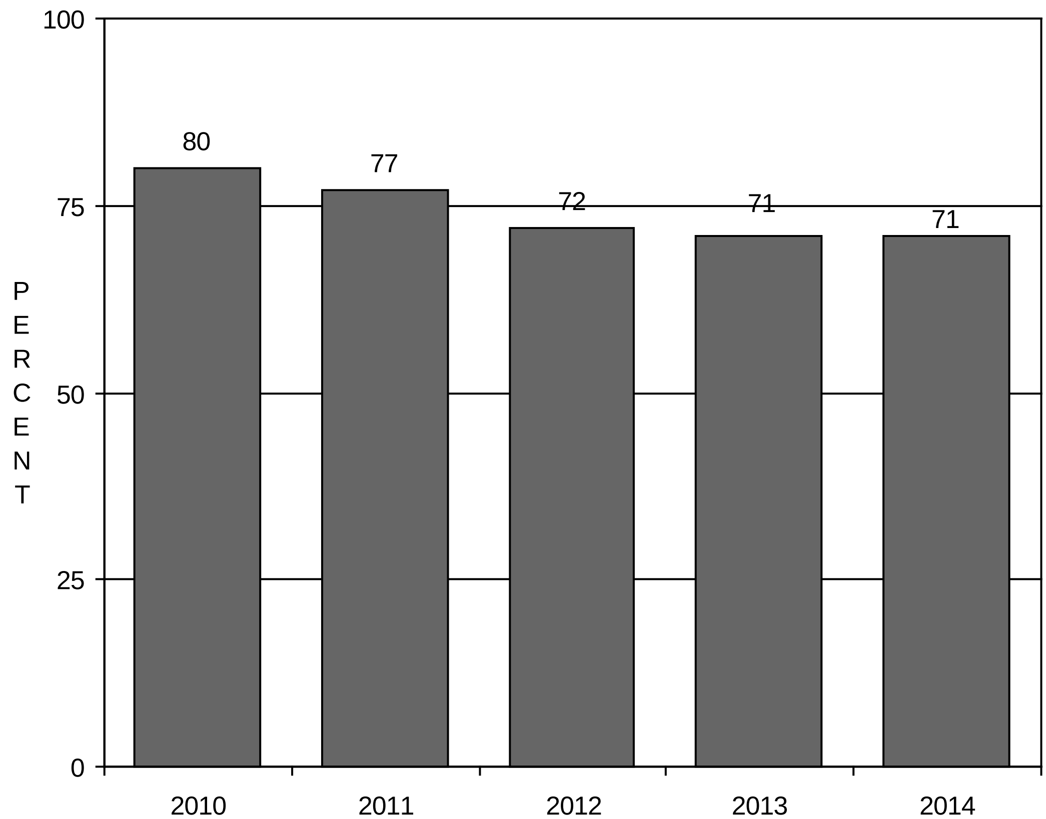
Among spending visitors, the average trip shopping expenditure was $246.12, up significantly from $192.34 in 2010, and $211.73 in 2011 (Figure 52). The average trip total spent on shows was $138.33, up from $112.92 in 2010, $119.77 in 2011, $123.43 in 2012, and $121.19 last year. The sightseeing total was $125.63, down significantly from $154.77 in 2010 and $198.31 in 2011.

† Percentages of respondents who spent money in each category are shown in the following table:

	2010	2011	2012	2013	2014
Shopping					
Base size	(2302)	(2201)	(2077)	(2138)	(2192)
Proportion of total	64%	61%	58%	59%	61%
Shows					
Base size	(1573)	(1429)	(1255)	(1143)	(1240)
Proportion of total	44%	40%	35%	32%	35%
Sightseeing					
Base size	(168)	(186)	(287)	(266)	(417)
Proportion of total	5%	5%	8%	7%	12%

GAMING BEHAVIOR AND BUDGETS

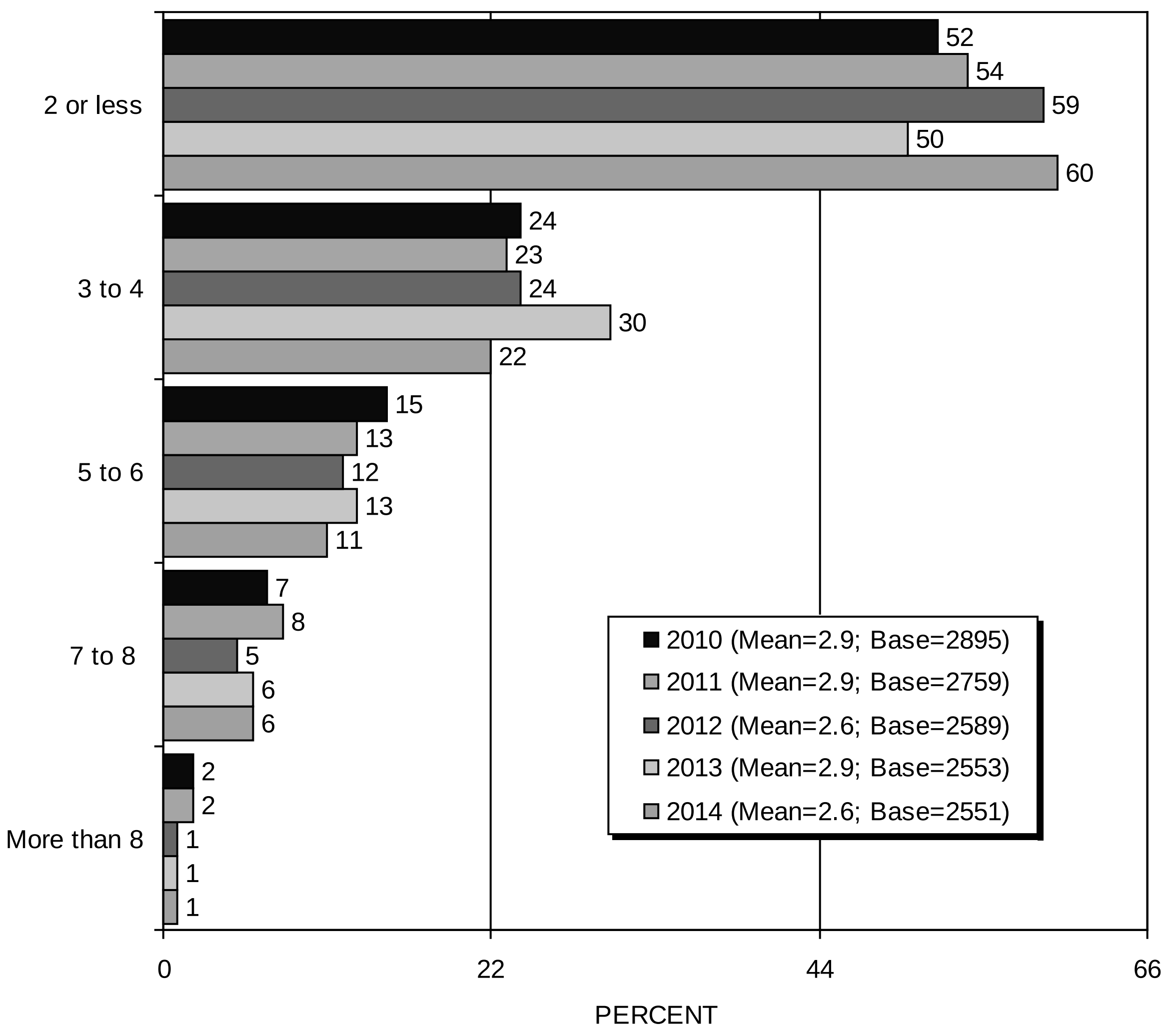
FIGURE 53
Whether Gambled While In Las Vegas*



Seventy-one percent (71%) of all visitors said they gambled while in Las Vegas, the same as last year, but down significantly from 80% in 2010, and 77% in 2011 (Figure 53).

* Only "yes" responses are reported in this chart.

FIGURE 54
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



Among those who gambled while in Las Vegas, six in ten (60%) gambled for two hours or less, up significantly from 52% in 2010, 54% in 2011 and 50% last year (Figure 54). Twenty-two percent (22%) gambled for three to four hours, down significantly from 30% last year. Seven percent (7%) gambled seven or more hours (down from 9% in 2010 and 10% in 2011). The average amount of time spent gambling per day was 2.6 hours, down significantly from 2.9 hours each in 2010, 2011, and last year.

FIGURE 55
Number Of Casinos Visited*

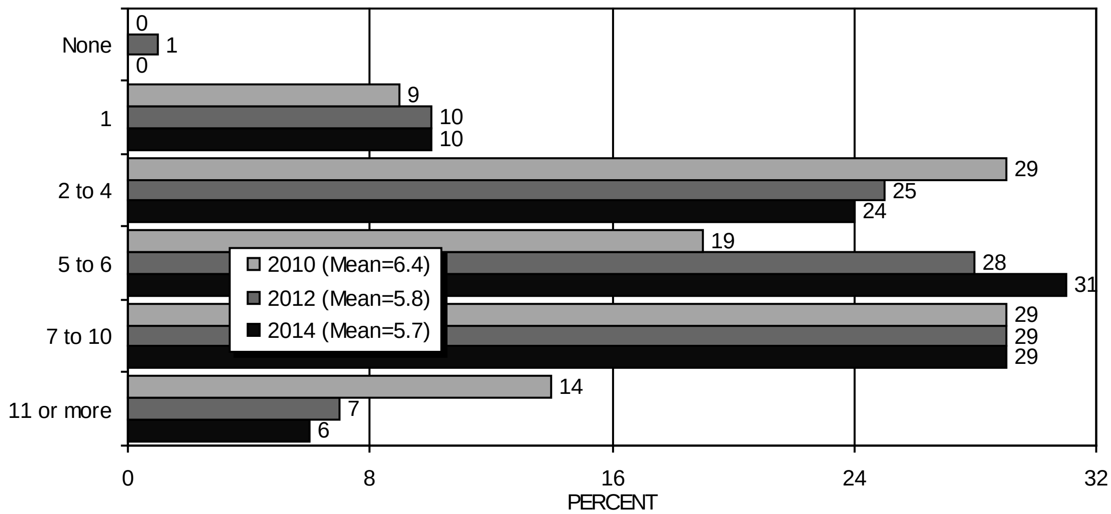
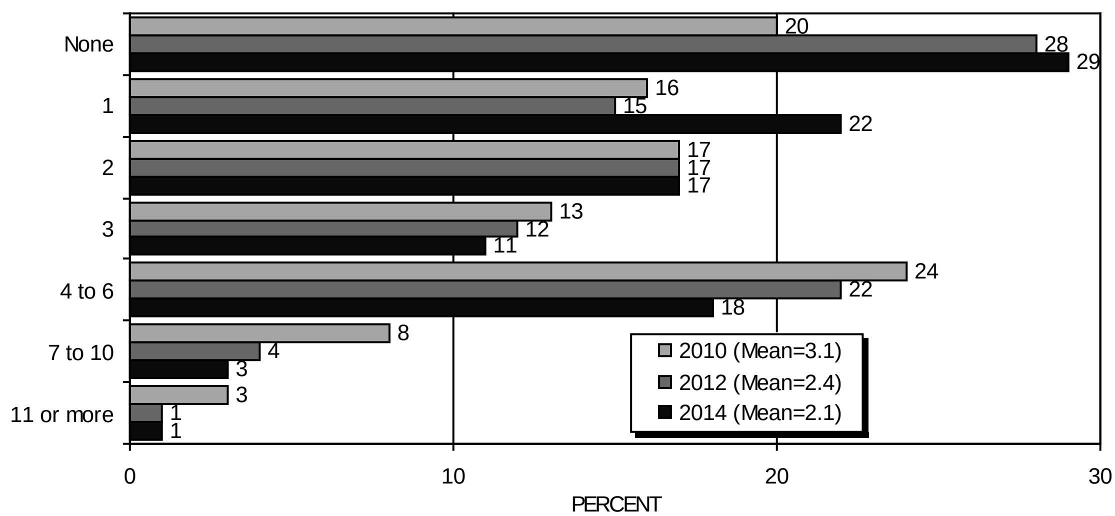


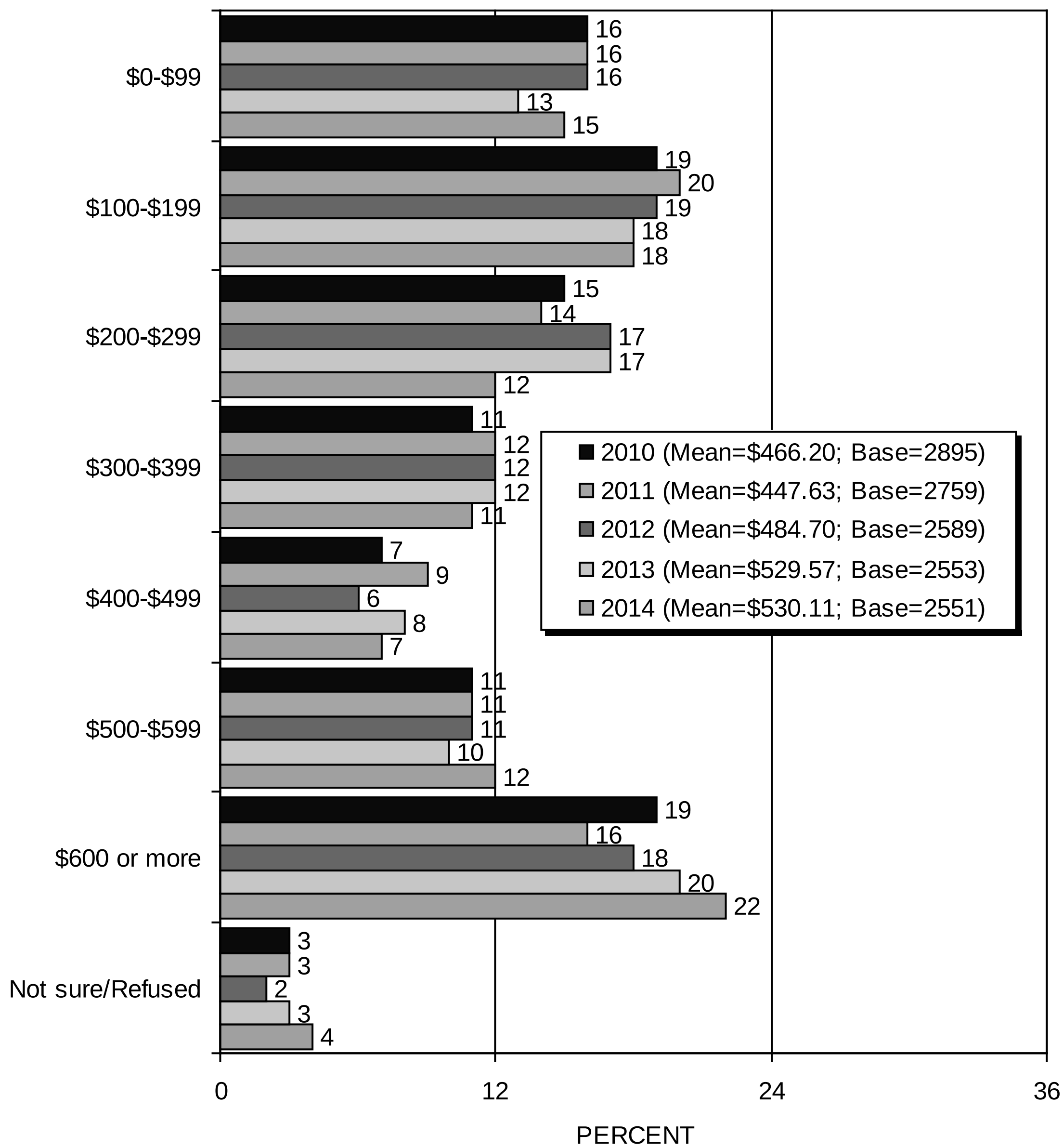
FIGURE 56
Number Of Casinos Where Gambled*



All visitors to Las Vegas were asked how many casinos they had visited, and in how many of those casinos they had gambled. The average number of casinos visited in 2014 was 5.7 (down significantly from 6.4 in 2010), and the number of casinos at which visitors gambled was 2.1 (down from 3.1 in 2010 and 2.4 in 2012) (Figures 55 and 56).

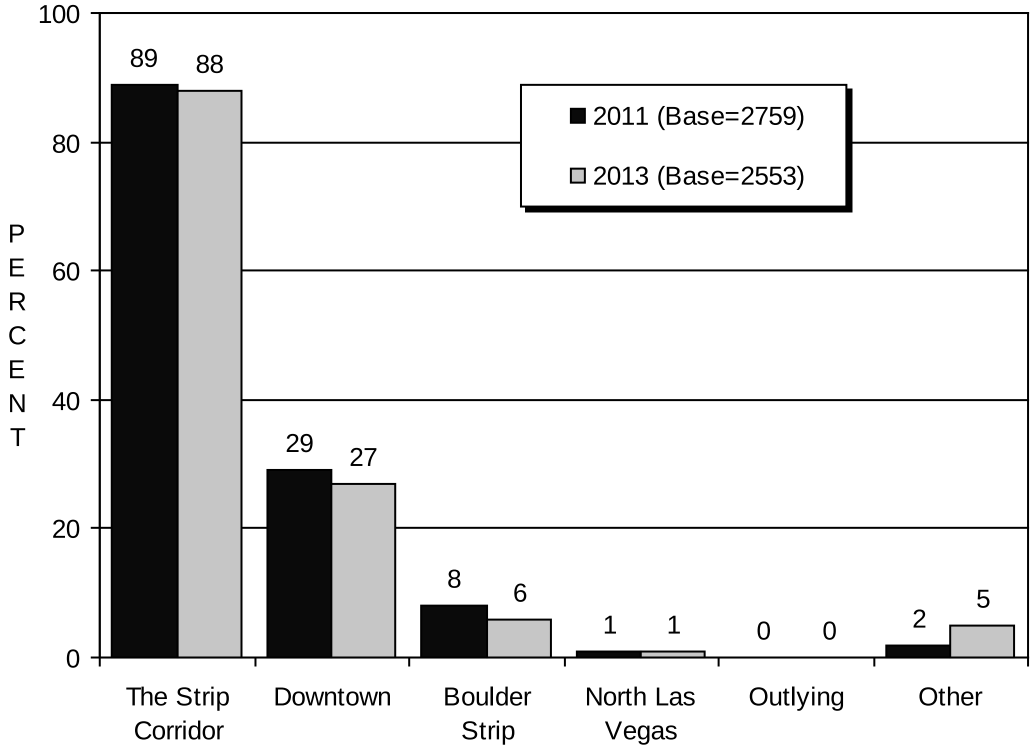
* These questions are asked every other year and were not asked in 2011 or 2013.

FIGURE 57
Trip Gambling Budget
(Among Those Who Gambled)



Among those who gambled in 2014, the average gambling budget was $530.11, up significantly from $466.20 in 2010 and $447.63 in 2011 (Figure 57).

FIGURE 58
Where Visitors Gambled*
(Among Those Who Gambled – Asked Every Other Year)



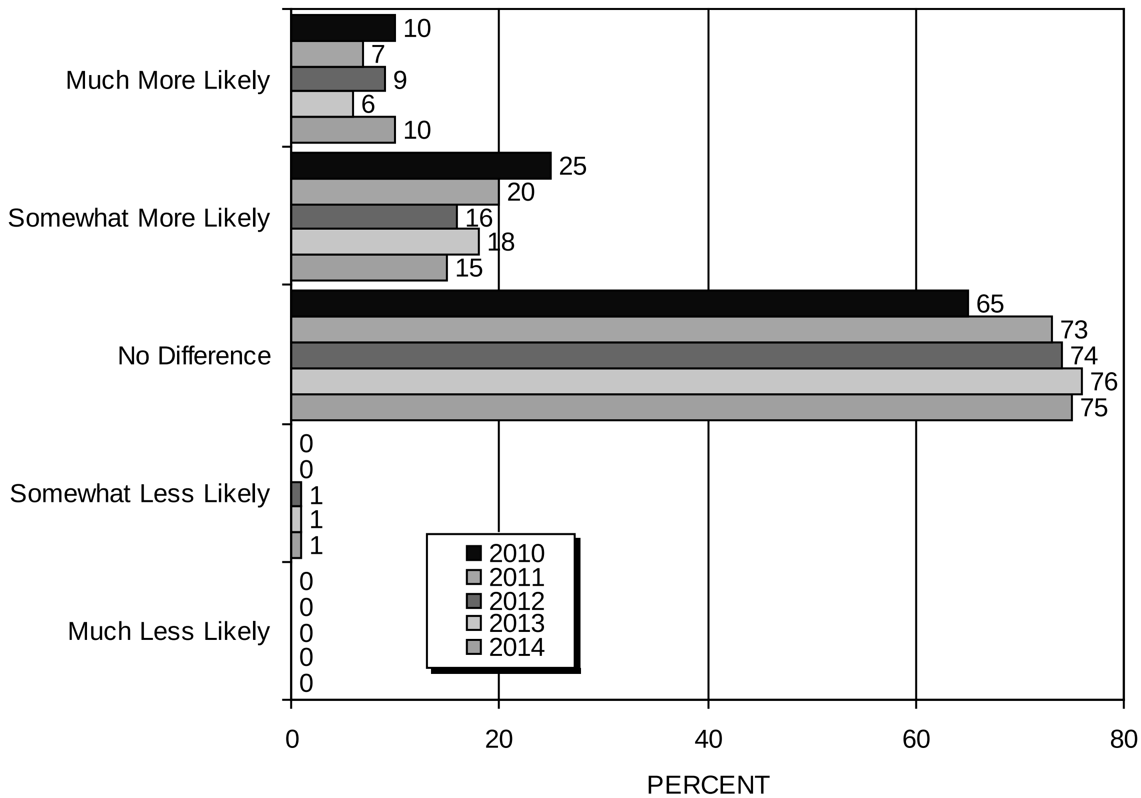
Most visitors (88%) gambled on the Strip Corridor† (Figure 58). Twenty-seven percent (27%) said they gambled Downtown, 6% gambled in the Boulder Strip area (down from 8% in 2011), 1% in North Las Vegas, and less than 1% in outlying areas.

* This question is asked every other year and was not asked in 2010, 2012, or 2014.

Multiple responses to this question were permitted.

† The Strip Corridor includes properties located directly on Las Vegas Boulevard South and between Valley View Road and Paradise Road.

FIGURE 59
Likelihood Of Visiting Las Vegas With
More Places To Gamble Outside Las Vegas



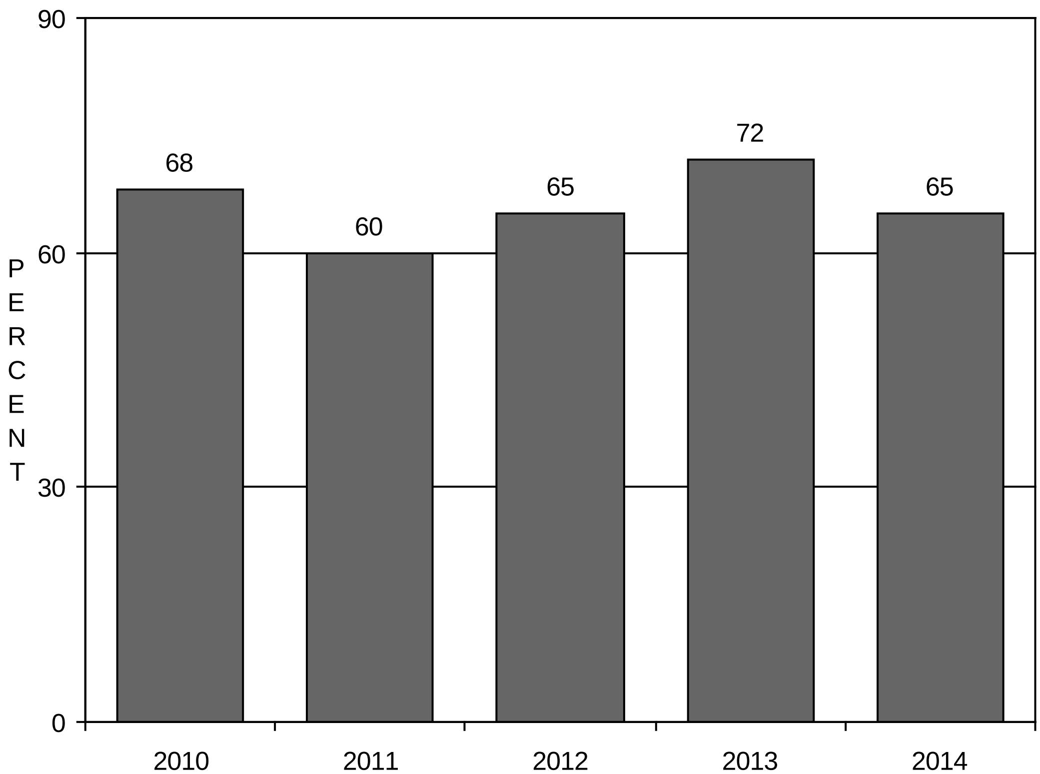
All visitors to Las Vegas were asked the following:

> "Now that there are more places to gamble outside of Las Vegas, do you feel you are more likely or less likely to visit Las Vegas, or does it not make a difference in your decision to visit Las Vegas?"

One-quarter (25%) said they were either somewhat or much *more* likely to visit Las Vegas, down significantly 35% in 2010, and 27% in 2011. Three-quarters (75%) said that having other places to gamble made no difference in their decision to visit Las Vegas, up significantly from 65% in 2010 (Figure 59). One percent (1%) said they were *less* likely to visit Las Vegas.

ENTERTAINMENT

FIGURE 60
Entertainment Attendance*



Sixty-five percent (65%) of visitors attended shows during their stay, up from 60% in 2011, but down significantly from 72% last year (Figure 60).

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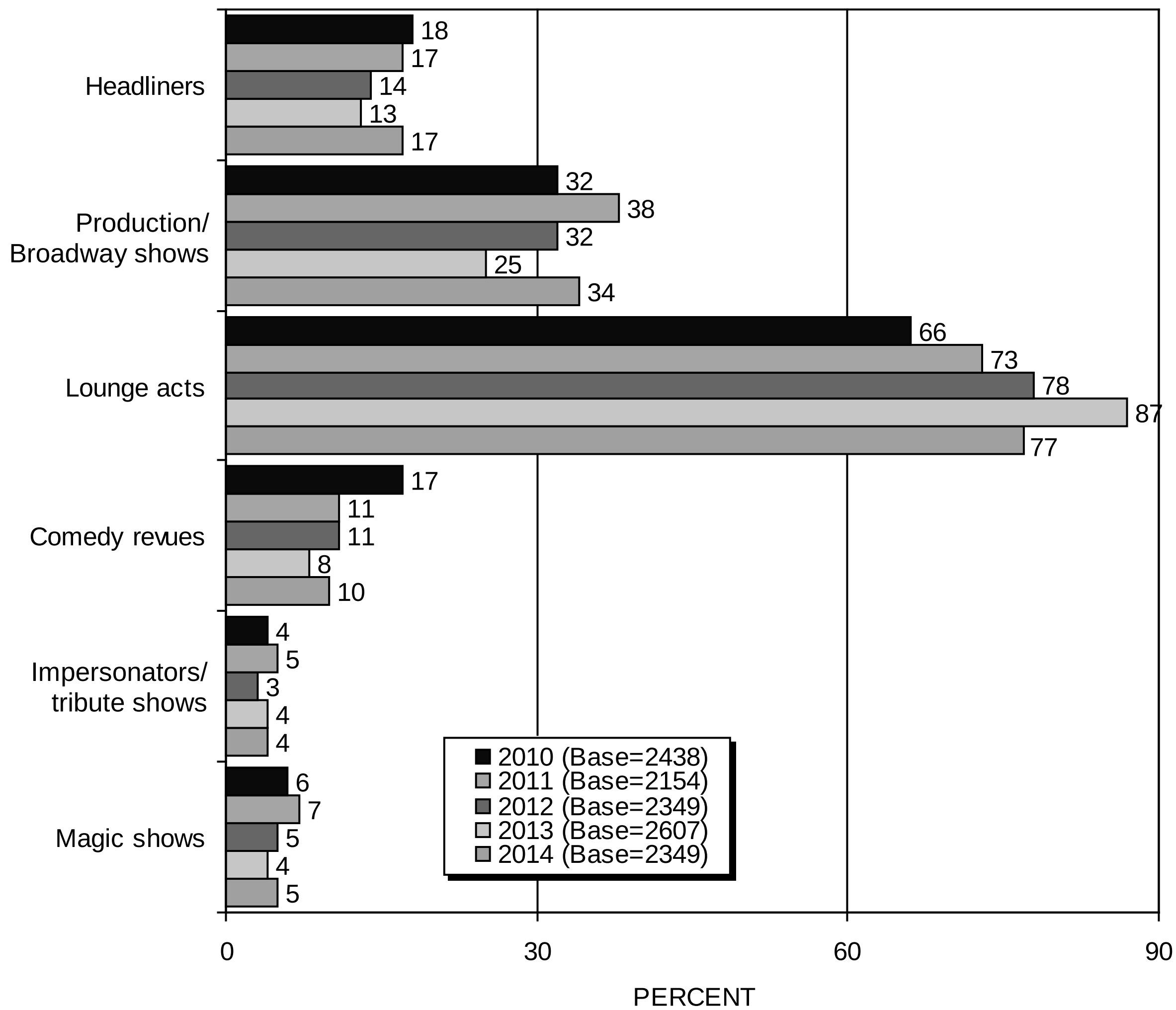
* NOTE: Only “yes” responses are reported in this chart.

FIGURE 61
Types Of Entertainment*
(Among Those Who Attended Some Form Of Entertainment)



In 2014, 77% of visitors who saw a show in Las Vegas went to a lounge act, up significantly from 66% in 2010 and 73% in 2011, but down from 87% last year (Figure 61). Thirty-four percent (34%) went to a production or Broadway-type show, down from 38% in 2011, but up from 25% last year. Seventeen percent (17%) saw a headliner (up from 14% in 2012 and 13% in 2013), 10% saw a comedy show (down from 17% in 2010, but up from 8% last year), 5% saw a magic show (down from 7% in 2011), and 4% saw an impersonator/tribute show.

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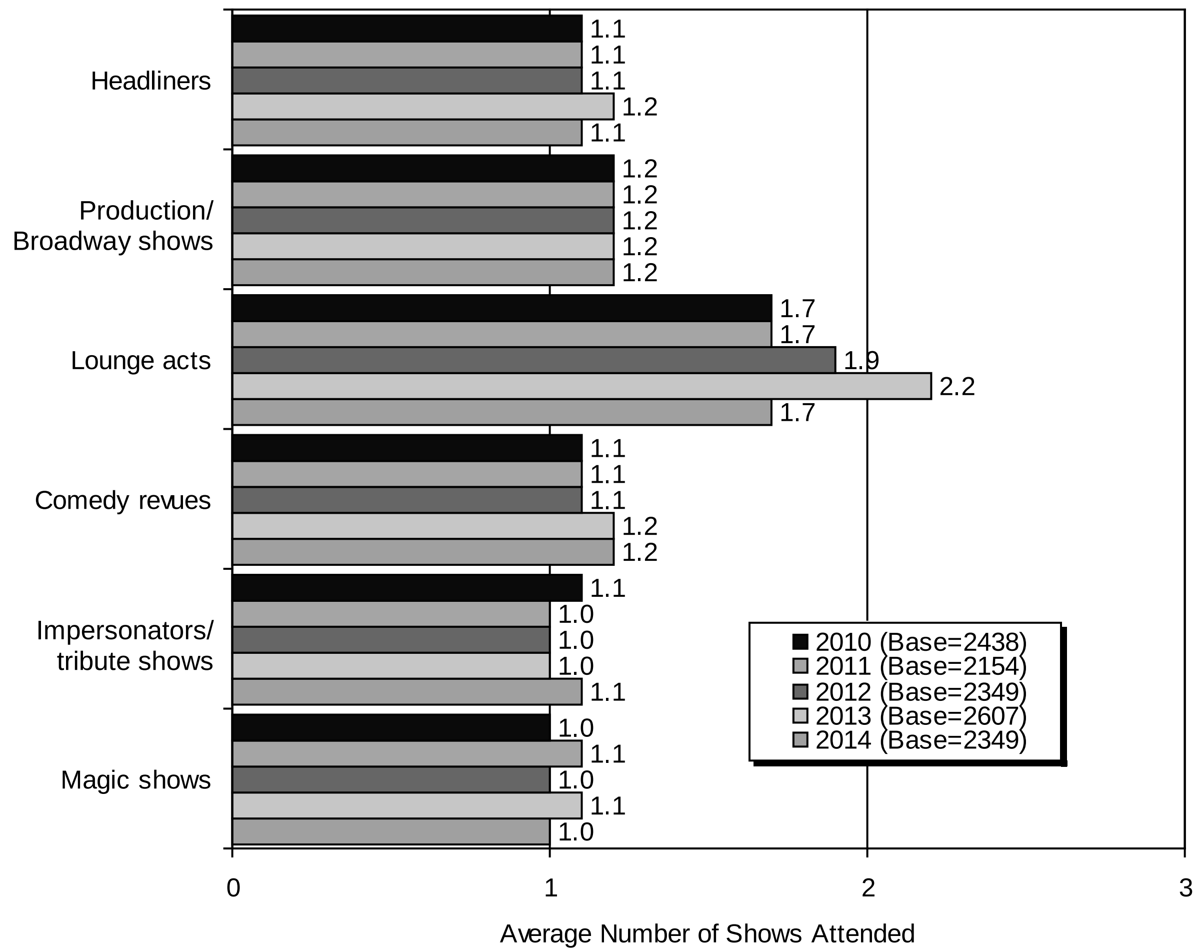
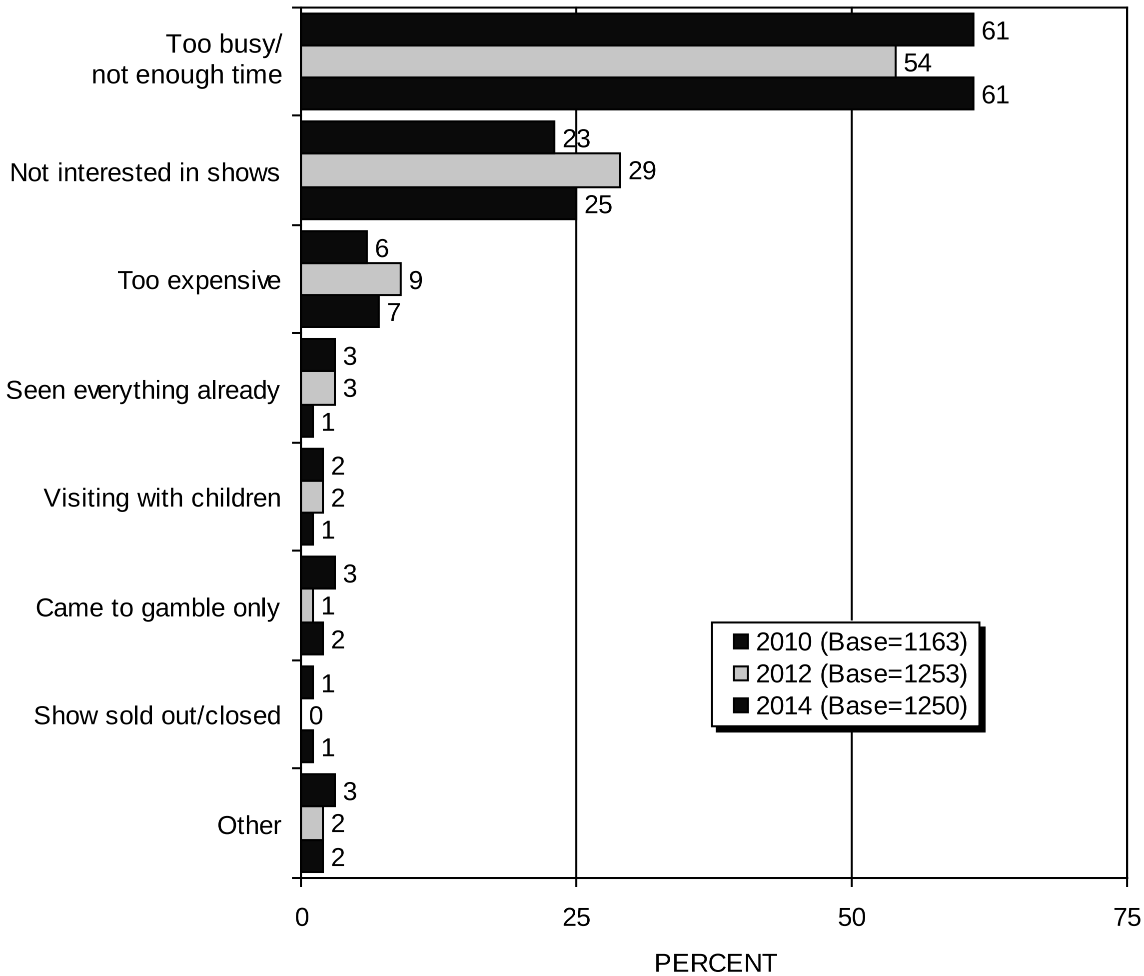
* Multiple responses were permitted.

FIGURE 62
Average Number Of Shows Attended
(Among Those Who Attended Some Form Of Entertainment)



Visitors who saw shows were asked how many shows of each type they saw (Figure 62). The average number of shows attended was highest for visitors who saw lounge acts (1.7, down significantly from 1.9 in 2012, and 2.2 last year). Visitors saw an average of 1.2 production and Broadway-type shows, 1.1 headliners, 1.2 comedy revues, 1.1 impersonators/tribute shows, and 1.0 magic shows.

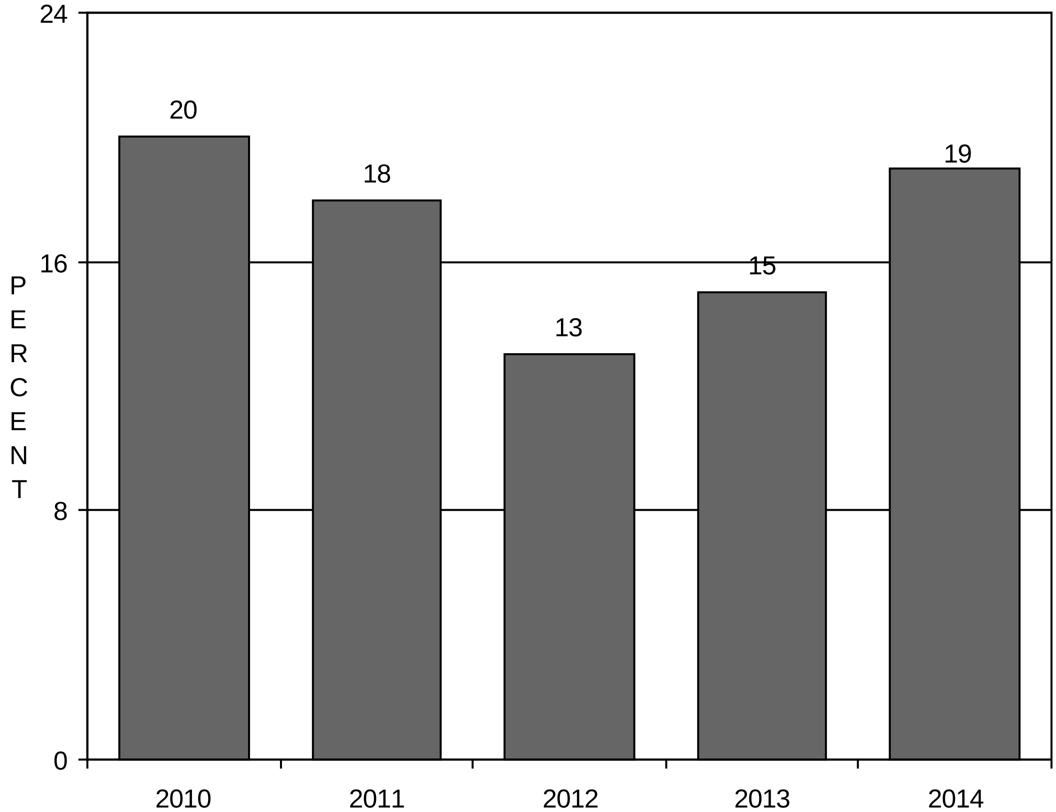
FIGURE 63
Main Reason For Not Attending Any Shows*
(Among Those Who Attended No Shows – Asked Every Other Year)



Visitors who did not attend any shows while in Las Vegas were asked why (Figure 63). Sixty-one percent (61%, up from 54% in 2012) said it was because they were too busy. One-quarter (25%) said they were not interested in shows (down from 29% in 2012), while 7% said the shows are too expensive (down from 9% in 2012), 2% said they came to Las Vegas only to gamble, and 1% each said they had already seen all the shows (down from 3% each in 2010 and 2012), they were visiting with children (down from 2% each in 2010 and 2012), or that shows were sold out or closed.

* This question is asked every other year and was not asked in 2011 or 2013.

FIGURE 64
Whether Has Been To Other Paid Attractions*



We asked all visitors if they had been to other Las Vegas attractions for which they had to pay, such as the theme parks, water parks, or roller coasters (Figure 64). Nineteen percent (19%) said yes, up from 13% in 2012, and 15% last year.

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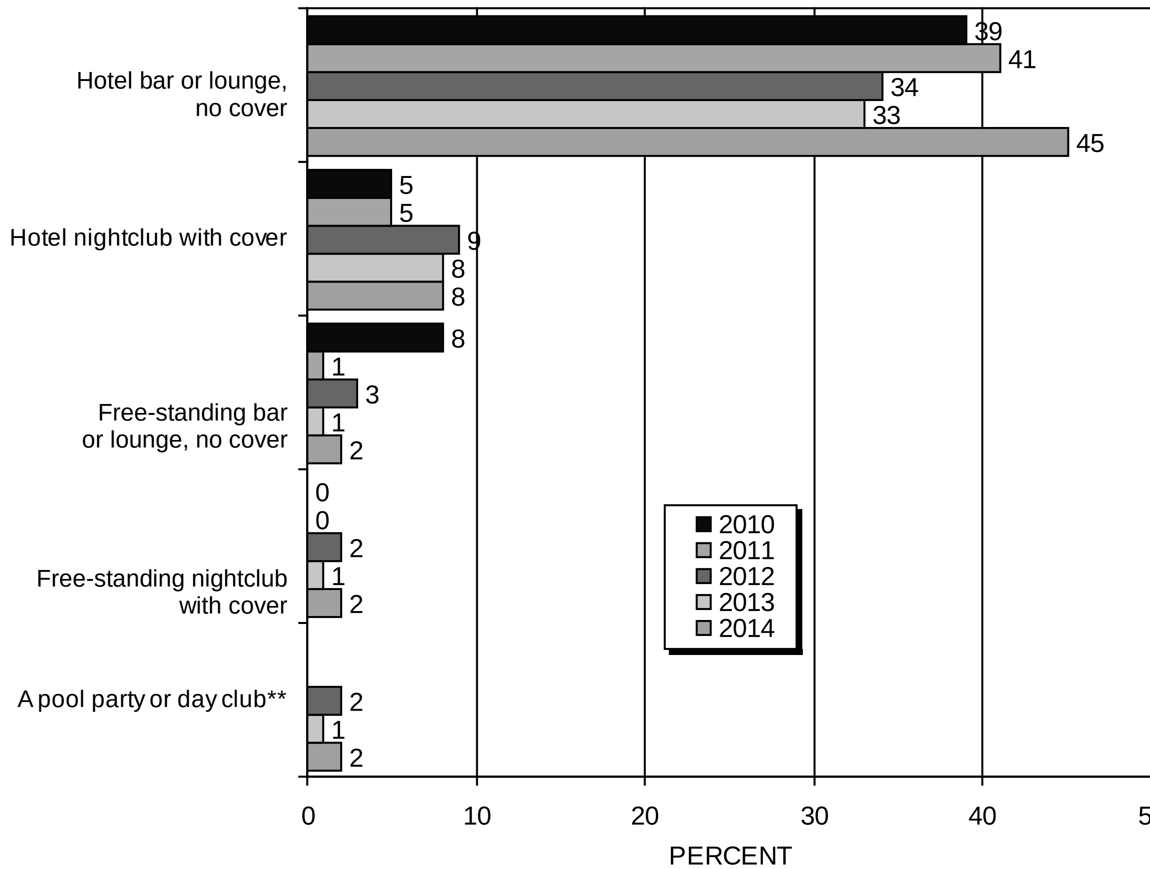
* Only "yes" responses are reported in this chart.

FIGURE 65
Whether Has Been To Nightclubs, Bars, and Lounges*

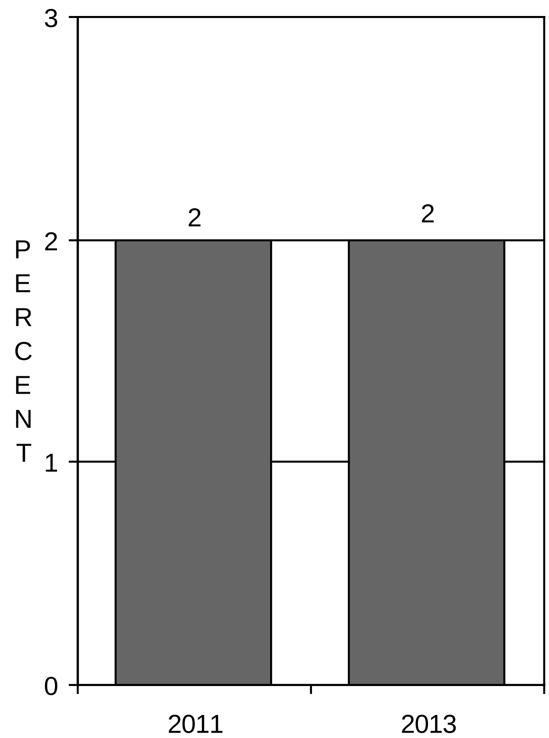


We asked visitors if they visited nightclubs, bars, or lounges while in Las Vegas (Figure 65). Forty-five percent (45%) of visitors said they had been to a no-cover hotel bar or lounge, up significantly from 2010 – 2013 results. Eight percent (8%) had been to a hotel nightclub that charged a cover fee, up from 5% each in 2010 and 2011. Two percent (2%) had been to a no-cover free-standing bar or lounge (down from 8% in 2010 and 3% in 2012, but up from 1% each in 2011 and 2013), and another 2% had been to a free-standing nightclub that charged a cover fee (up from less than 1% each in 2010 and 2011 and 1% last year). Beginning in 2012, visitors were also asked if they had visited a pool party or day club, and 2% said they had in 2014, up from 1% last year.

* Only “yes” responses are reported in this chart.

** Pool party option added in 2012.

FIGURE 66
Whether Played Golf*



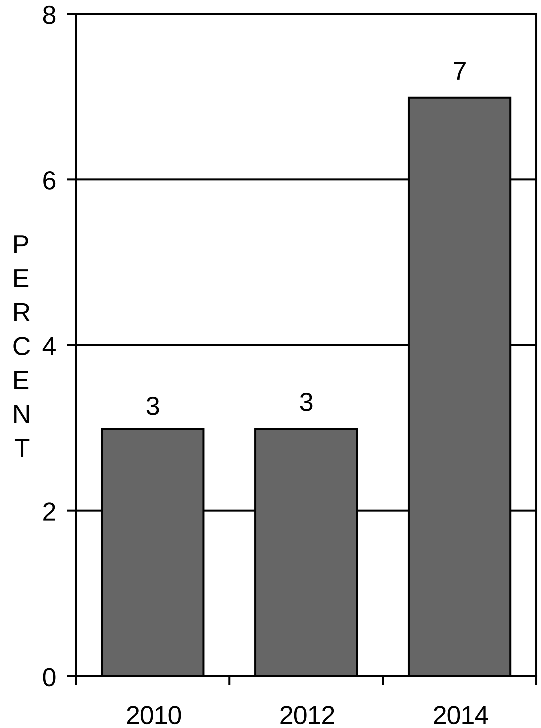
The proportion who said they had played golf during their 2013 visit to Las Vegas was 2% (Figure 66).

---

* This question is asked every other year and was not asked in 2010, 2012, or 2014.

Only "yes" responses are reported in this chart.

FIGURE 67
Whether Visited A Spa*



Visitors were asked if they had visited a spa during this trip to Las Vegas. In 2014, 7% said they had, up from 3% each in 2010 and 2012 (Figure 67).

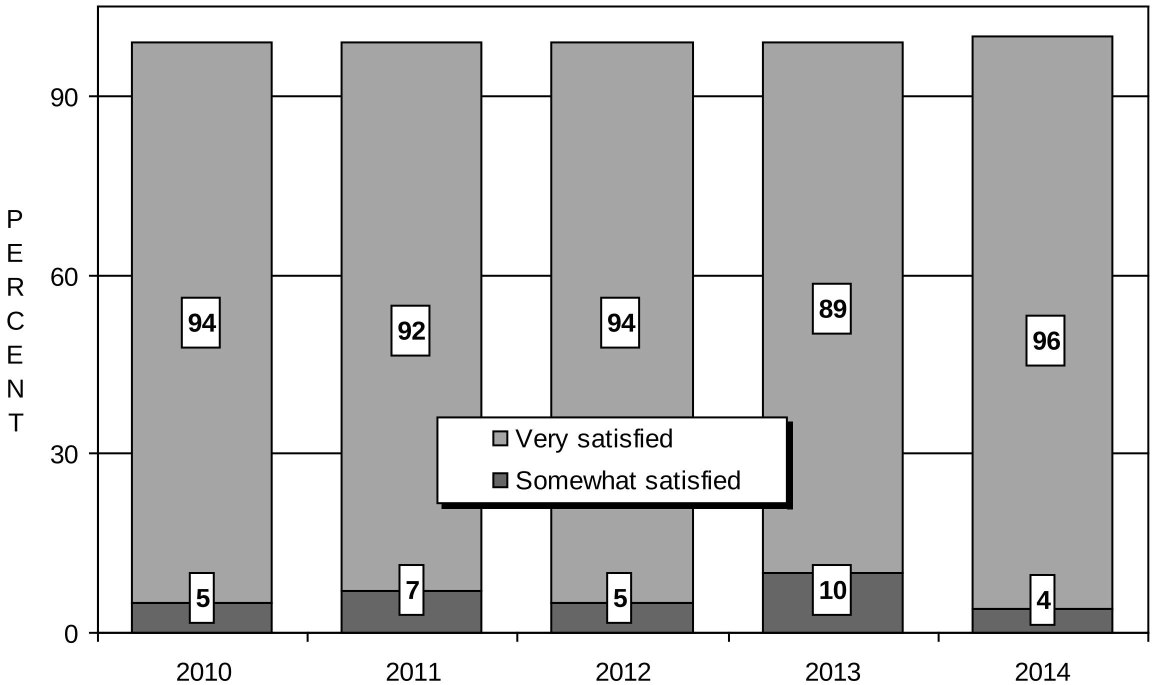
---

* This question is asked every other year and was not asked in 2011 or 2013.

Only “yes” responses are reported in this chart.

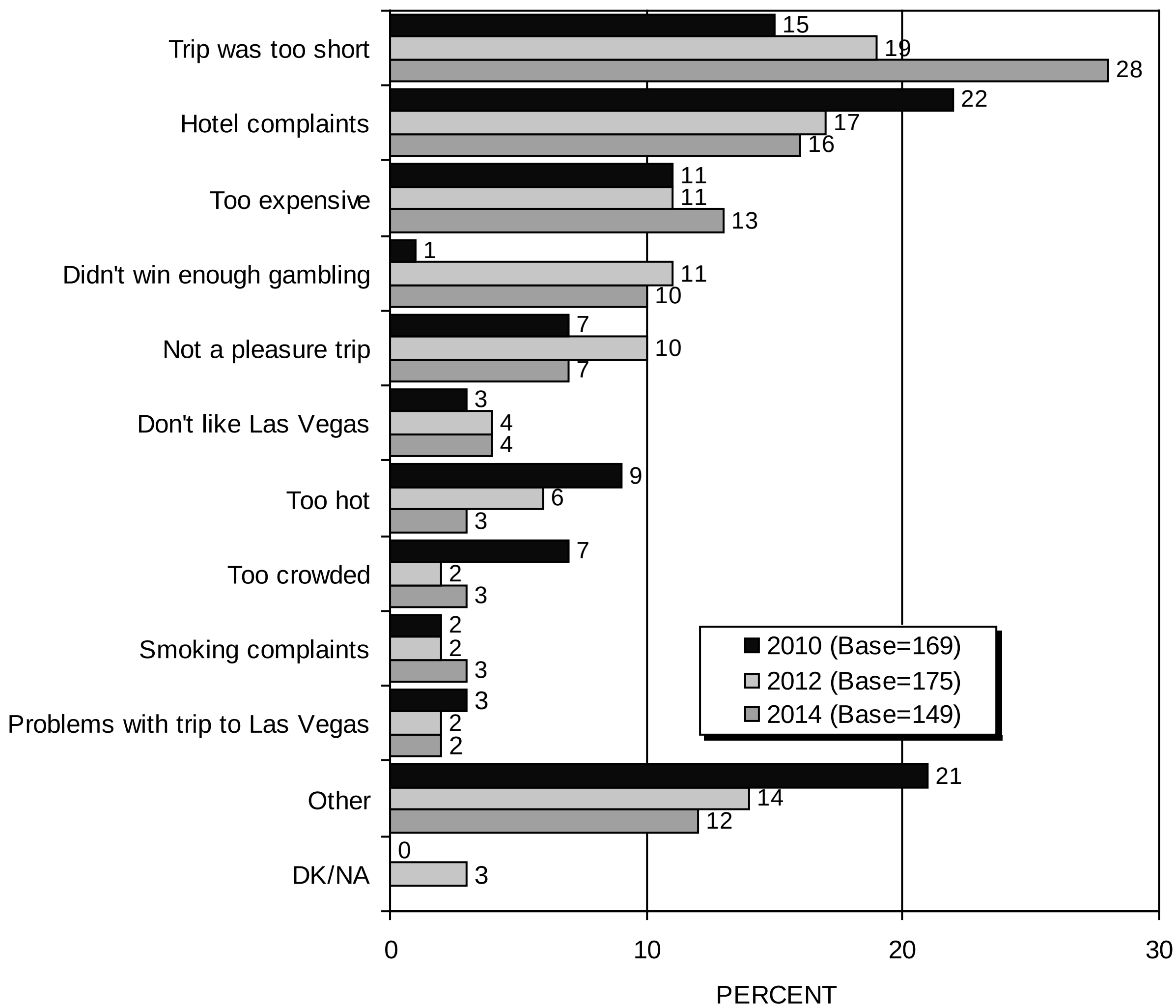
ATTITUDINAL INFORMATION

FIGURE 68
Satisfaction With Visit



Ninety-six percent (96%) of visitors said they were "very" satisfied with their visit to Las Vegas in 2014 (up significantly from 94% each in 2010, and 2012, 92% in 2011, and 89% last year), while 4% were "somewhat" satisfied (down from 7% in 2011 and 10% in 2013) (Figure 68).

FIGURE 69
Why Not Completely Satisfied With Visit*
(Among Those Who Were "Somewhat" Satisfied – Asked Every Other Year)



Visitors who were not completely satisfied with their visit were asked to volunteer why (Figure 69). Twenty-eight percent (28%) said their trip was too short (up from 15% in 2010), while 16% had complaints about their hotel. Among other reasons given were that they think Las Vegas is too expensive (13%), that they didn't win enough gambling (10%, up from 1% in 2010), that it was a business trip and not a pleasure trip (7%), or that they simply don't like Las Vegas (4%). Three percent (3%) each said Las Vegas was too hot, too crowded (down from 7% in 2010), or had smoking complaints.

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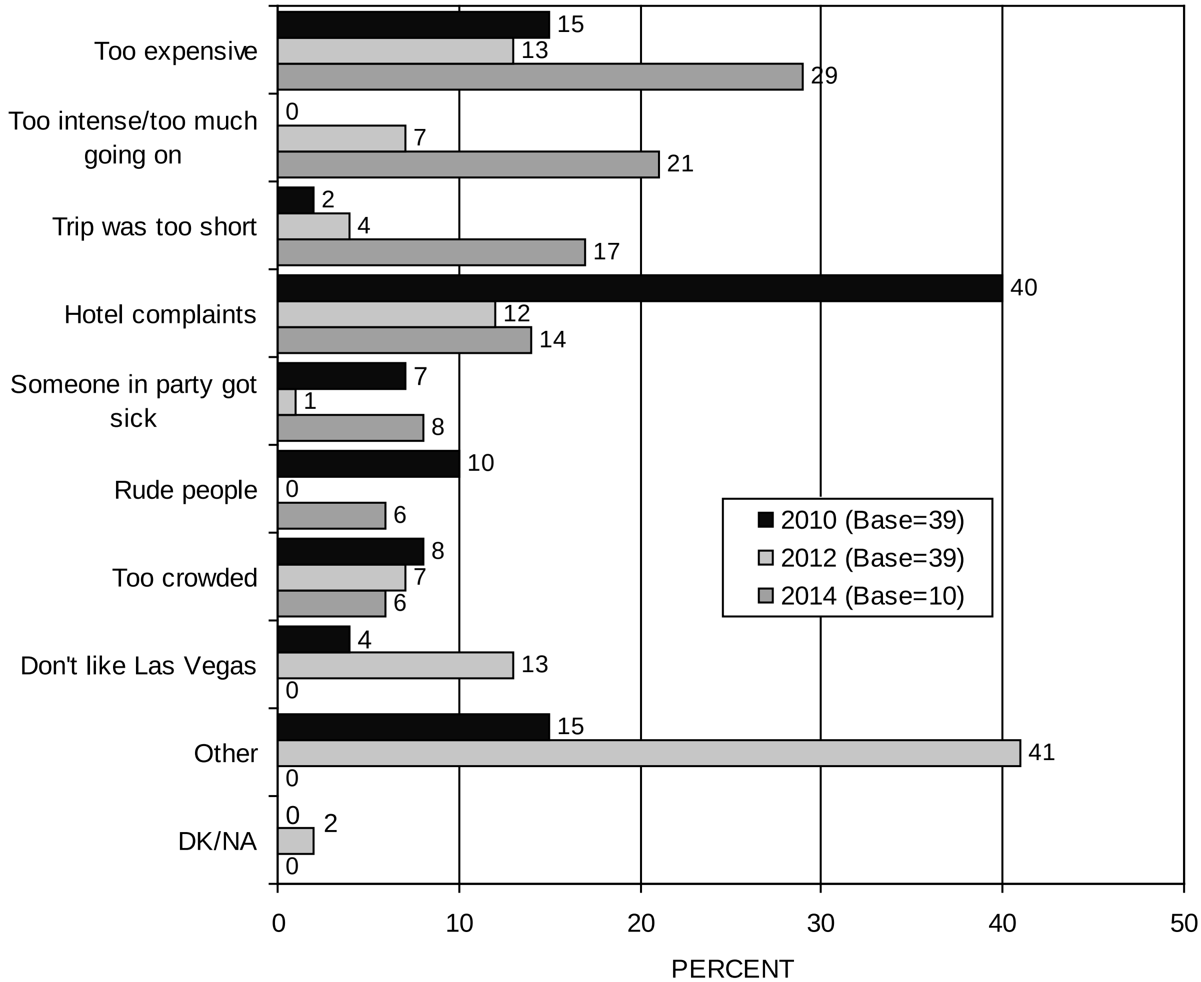
* This question is asked every other year and was not asked in 2011 or 2013.

FIGURE 70
Why Dissatisfied With Visit*
(Among Those Who Were Dissatisfied – Asked Every Other Year)



Very few visitors said they were dissatisfied with their visit to Las Vegas. These few dissatisfied visitors were asked to volunteer why they were not satisfied with their visit (Figure 70). Among the ten visitors who gave this response in 2014, The most frequently mentioned reasons for being dissatisfied were that they think Las Vegas is too expensive (3 respondents), that Las Vegas is too intense or that their trip was too short (2 respondents each)..

* This question is now asked every other year and was not asked in 2011 or 2013.

Note very small base size for 2014.

FIGURE 71
Likelihood of Returning to Las Vegas For A Vacation Trip In The Future*

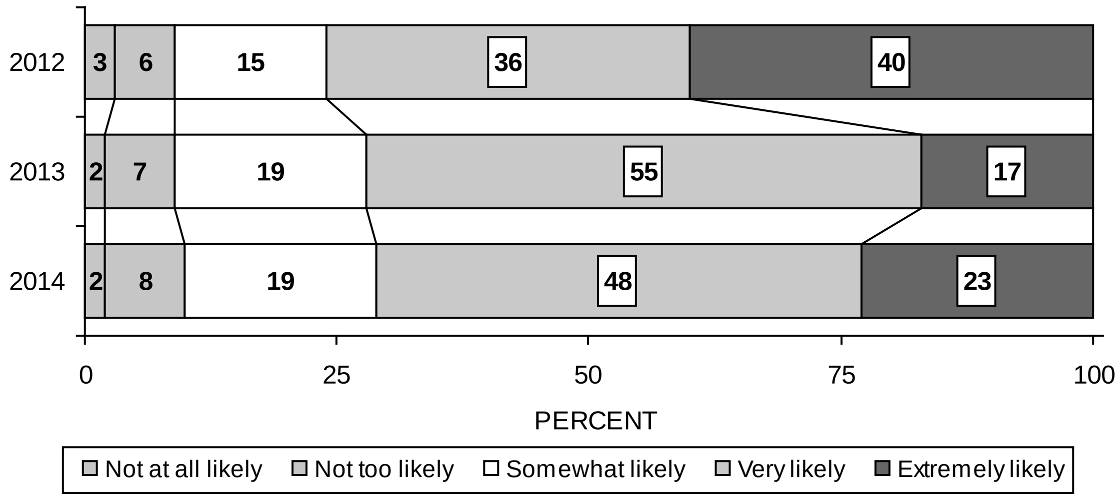
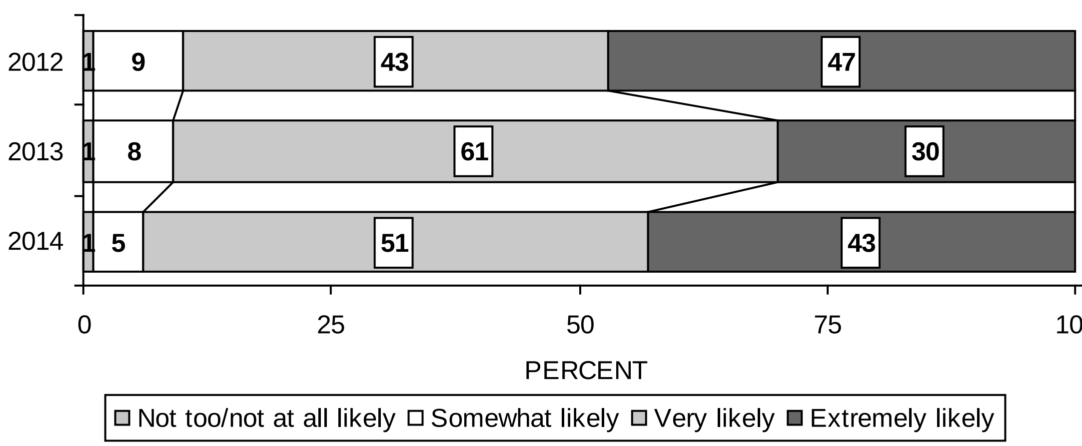


FIGURE 72
Likelihood of Recommending Las Vegas As A Vacation Destination*



Visitors were asked how likely they are to return to Las Vegas in the future for a vacation or pleasure trip (Figure 71). In 2014 71% said they were “extremely” or “very” likely to return to Las Vegas, down from 76% in 2012, while 19% said they were “somewhat” likely to return, up from 15% in 2012. Visitors were also asked how likely they are to recommend Las Vegas to others as a vacation destination (Figure 72). Forty-three percent (43%) said they were “extremely” likely to recommend Las Vegas (down from 47% in 2012, but up from 30% last year), while 51% said they were “very” likely (up from 43% in 2012 but down from 61% last year).

---

* This question was added in 2012.

VISITOR DEMOGRAPHICS

As Figures 73 and 74 show, visitors in 2014 were likely to be married (80%, up from 77% in 2011 and 75% in 2012), earning $40,000 or more (85%, up from 82% in 2010, but down from 88% last year), and employed (64%, down from 66% each in 2010 and in 2011, 69% in 2012, and 67% last year). Twenty percent (20%) were retired (down from 2010 – 2011). The proportion of visitors who were 40 years old or older was 57% (down from 71% in 2010 and 70% in 2012), and the average age was 45.2 (down significantly from 49.2 in 2010 and 49.0 in 2011).

FIGURE 73
VISITOR DEMOGRAPHICS

	2010	2011	2012	2013	2014
GENDER					
Male	50%	51%	51%	50%	49%
Female	50	49	49	50	51
MARITAL STATUS					
Married	79	77	75	79	80
Single	14	15	18	15	14
Separated/Divorced	5	5	5	4	4
Widowed	2	3	2	2	2
EMPLOYMENT					
Employed	66	66	69	67	64
Unemployed	2	1	2	5	3
Student	3	3	5	2	3
Retired	27	25	19	20	20
Homemaker	3	4	5	6	11
EDUCATION					
High school or less	23	20	15	13	11
Some college	24	25	28	31	37
College graduate	48	50	52	51	48
Trade/vocational school	5	5	5	5	4
AGE					
21 to 29	10	12	19	15	17
30 to 39	19	18	24	27	27
40 to 49	23	22	21	19	20
50 to 59	19	19	16	15	14
60 to 64	9	9	6	9	8
65 or older	20	20	15	15	15
MEAN	49.2	49.0	44.8	45.8	45.2
BASE	(3601)	(3600)	(3602)	(3600)	(3599)

More than one-half (53%) of visitors were from the western United States, with the bulk of them coming from California (33%, up from 30% in 2010 and 31% in 2011) (Figure 73). Nineteen percent (19%) of visitors were from foreign countries, up significantly from 16% in 2011.

FIGURE 74

VISITOR DEMOGRAPHICS

	2010	2011	2012	2013	2014
ETHNICITY					
White	86%	86%	75%	73%	77%
African American/Black	5	4	5	5	4
Asian/Asian American	3	3	9	12	10
Hispanic/Latino	6	7	8	8	8
Other	1	1	3	2	1
HOUSEHOLD INCOME					
Less than $20,000	1	1	3	1	1
$20,000 to $39,999	7	3	6	5	6
$40,000 to $59,999	17	14	17	25	26
$60,000 to $79,999	24	24	26	28	27
$80,000 to $99,999	16	17	15	16	17
$100,000 or more	24	32	26	19	15
Not sure/no answer	10	10	7	6	7
VISITOR ORIGIN					
U.S.A.	82	84	83	80	81
Eastern states*	6	6	7	6	7
Southern states†	11	12	11	12	12
Midwestern states‡	12	11	11	10	9
Western states§	54	55	54	52	53
California	30	31	33	33	33
Southern California	26	26	26	26	27
Northern California	4	5	7	7	6
Arizona	7	9	6	6	6
Other Western states	16	15	15	13	14
Foreign	18	16	17	20	19
BASE	(3601)	(3600)	(3602)	(3600)	(3599)

* Eastern states: Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.

† Southern states: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.

‡ Midwestern states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

§ Western states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada (excluding Clark County), New Mexico, Oregon, Utah, Washington, and Wyoming.

APPENDIX:

Aggregate Results for Calendar Year 2014

RESPONDENT ID# ____ ____ ____ ____

INTERVIEW DATE: ___ ___/___ ___/___ ___

INTERVIEW LOCATION CODE ____ ____ ____ ____

TIME STARTED (USE 24-HOUR CLOCK)
____ ____:____ ____

TIME ENDED (USE 24-HOUR CLOCK)
____ ____:____ ____

INTERVIEW LENGTH ____ ____ MIN.

INTERVIEWER ID # ____ ____

RESPONDENT GENDER (BY OBSERVATION)

MALE 49%
FEMALE 51

Hello. I'm ________________ from GLS Research, a national marketing research firm. We are conducting a survey of visitors for the Las Vegas Convention and Visitors Authority. All answers are kept strictly confidential.

1. Are you a visitor to Las Vegas, or are you a resident of Clark County?

VISITOR..................	**ASK Q2**
RESIDENT .... NOT SURE/DK......... REFUSED/NA	**TERMINATE**

2. We are supposed to interview people who are 21 years old or older. Are you 21 years old or older?

YES..........................	**ASK Q3**
NO........................... NOT SURE/DK......... REFUSED/NA	**TERMINATE**

3. Will you be leaving Las Vegas within the next 24 hours?

YES..........................	**ASK Q5**
NO........................... NOT SURE/DK......... REFUSED/NA	**TERMINATE**

4. Have you been interviewed like this in Las Vegas at any other time in the past 12 months?

YES....................	**TERMINATE**
NO......................	**ASK Q5**

5. Is this your first visit to Las Vegas, or have you visited before?

FIRST VISIT 19%	**SKIP TO Q8 ON PAGE 2**
VISITED BEFORE............81	**ASK Q6**

6. Including this trip, how many times have you visited Las Vegas in the *past 5 years*? **(RECORD NUMBER BELOW AS 2 DIGITS. IF RESPONDENT SAYS "1," CONFIRM THAT THIS IS <u>NOT</u> THE RESPONDENT'S FIRST VISIT.)**

1 ....27%
2-3...29
4-5...14
6-10...18
OVER 10...13
<u>5.7</u> MEAN
<u>3.0</u> MEDIAN

7. Including this trip, how many times have you visited Las Vegas in the *past 12 months*? **(RECORD NUMBER BELOW AS 2 DIGITS.)**

1 ....71%
2-3..20
4-5..6
6 OR MORE...................................3
<u>1.6</u> MEAN
<u>1.0</u> MEDIAN

8. **(ASK OF ALL RESPONDENTS.)** What was the *primary purpose* of *THIS* trip to Las Vegas?

- TO ATTEND OR WORK AT A CONVENTION/TRADE SHOW 8%
- TO ATTEND A CORPORATE MEETING 1
- TO GAMBLE 12
- INCENTIVE TRAVEL PROGRAM 0
- VACATION/PLEASURE 47
- VISIT FRIENDS/RELATIVES 11
- TO ATTEND A SPECIAL EVENT 7
- TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT 0%
- OTHER BUSINESS PURPOSES 6
- JUST PASSING THROUGH 5
- WEDDING/TO GET MARRIED 3
- SOME OTHER REASON 1
- NOT SURE/DK 0
- REFUSED/NA 0

9. While in Las Vegas, did you attend or work at a convention, trade show, or corporate meeting?

- YES 9%
- NO 91
- NOT SURE/DK 0
- REFUSED/NA 0

10. Were you MORE or LESS interested in attending this convention, trade show, or corporate meeting because it was held in Las Vegas, or did it make NO DIFFERENCE to you that it was held in Las Vegas? (N=329)

- MORE INTERESTED 59%
- LESS INTERESTED 1
- NO DIFFERENCE 40
- NOT SURE/DK 0
- REFUSED/NA 0

11. Did you bring a spouse, family member, or friend with you who did NOT attend or work at a convention, trade show, or corporate meeting? (N=329)

- YES 41%
- NO 58
- DK/NA 0

12. Did you travel to Las Vegas by...

- Air 42%
- Bus (NET) 5
  - (IF "YES" ASK, "Do you mean...":)
  - Regularly scheduled bus service like Greyhound 1
  - Or a chartered or escorted bus service or bus tour 4
- Automobile 50
- Truck 1
- Motorcycle 0
- Recreational Vehicle (RV) 2

13. Which of the following kinds of transportation have you used during your visit? **(READ LIST. ACCEPT MULTIPLE RESPONSES.)**

A.	Your own vehicle	47%
B.	Rental car	12
C.	Limousine	1
D.	Bus	14
E.	Hotel/motel shuttle	11
H	Monorail	10
G.	Taxi	32
	WALKED	55
	OTHER	2

14. How far in advance did you plan this trip to Las Vegas? **(ASK AS OPEN END.)**

SAME DAY	0%
1-3 DAYS BEFORE	1
4-6 DAYS BEFORE	3
7-14 DAYS BEFORE	15
15-30 DAYS BEFORE	27
31-60 DAYS BEFORE	24
61-90 DAYS BEFORE	13
MORE THAN 90 DAYS BEFORE	17
NOT SURE/DK	0
REFUSED/NA	0

15. Did a travel agency assist you in planning your trip?

YES	16%	**ASK Q16**
NO	84	**SKIP TO Q17**
NOT SURE/DK	0	
REFUSED/NA	0	

16. Did the travel agent... **(READ LIST)** (N=566)

Influence your decision to visit Las Vegas?	9%
Influence your choice of accommodations?	79
"Book" your accommodations?	83
"Book" your transportation?	87

17. Did you use the Internet in planning your trip to Las Vegas?

YES	68%	**ASK Q18**
NO	32	**SKIP TO Q20**
NOT SURE/DK	0	
REFUSED/NA	0	

18. Did you use the Internet to book your transportation to Las Vegas?(N=2438)

YES	44%	**ASK Q19**
NO	56	**SKIP TO Q20**
NOT SURE/DK	0	
REFUSED/NA	0	

19. Which website did you use to book your transportation? **(ASK AS AN OPEN END. ACCEPT ONLY ONE RESPONSE).**

(N=1064)

a.	AOL (AMERICA ONLINE)	0%
b.	CHEAPTICKETS	1
c.	EXPEDIA.COM	12
d.	HOTWIRE.COM	3
e.	MAPQUEST.COM	0
f.	ORBITZ	2
g.	PRICELINE.COM	3
h.	TRAVEL.COM	1
i.	TRAVELOCITY	5
j.	YAHOO	0
k.	KAYAK.COM	3
l.	AIRLINE WEBSITE (ANY)	66
m.	OTHER	5
n.	NOT SURE/DK	0

(ASK ONLY OF THOSE WHO SAID "YES" IN Q17.)

20. Did you find information on the Internet that... **(READ LIST)**

(N=2438)

a.	Influenced your decision to visit Las Vegas?	3%
b.	Influenced your choice of accommodations?	54

INTERVIEWER!

IF YOU ARE CONDUCTING THE INTERVIEW AT A *DOWNTOWN* LOCATION, CIRCLE "YES" (1) IN Q21. IF YOU ARE *NOT* DOWNTOWN, READ THE FOLLOWING TO RESPONDENT *BEFORE Q21*:

"There are two *main* areas where hotels, motels, and casinos are located in Las Vegas. One area is referred to as The Strip. The Strip includes all the properties on or near Las Vegas Boulevard. The other area is referred to as Downtown Las Vegas. Downtown includes all the properties on or near Fremont Street."

POINT OUT THE "DOWNTOWN" AND "STRIP" AREAS ON THE MAP AS YOU READ THE ABOVE EXPLANATION. IF IT HELPS THE RESPONDENT, ALSO POINT OUT WHERE ON THE MAP YOU ARE CURRENTLY LOCATED.

21. While in Las Vegas, have you visited the Downtown area? **(POINT OUT THE DOWNTOWN AREA ON THE MAP.)**

YES 36%	**SKIP TO Q23**
NO 64	**ASK Q22**
NOT SURE/DK..................0 REFUSED/NA...................0	**SKIP TO Q23**

22. **(ASK ONLY IF "NO" IN Q21.)** Is there any particular reason why you did not visit Downtown Las Vegas? (N=2295)

NOT ENOUGH TIME	23%
UNFAMILIAR WITH DOWNTOWN	12
DON'T LIKE DOWNTOWN; IT'S A BAD AREA	1
ONLY INTERESTED IN/ PREFER THE STRIP.	2
NOT INTERESTED (GENERAL); DIDN'T WANT TO; NO REASON TO; SEEN IT ALREADY	55
INCONVENIENT; OUT OF THE WAY	4
HAVE CHILDREN; DIDN'T WANT TO TAKE CHILDREN THERE	2
PREFER ANOTHER AREA (NOT THE STRIP)	0
OTHER (SPECIFY):	1
NOT SURE/DON'T KNOW	0
REFUSED/NO ANSWER	0

23. On this trip to Las Vegas, where did you lodge? **(ASK AS OPEN END. ACCEPT ONLY *ONE* RESPONSE. CIRCLE CODE NUMBER. <u>INTERVIEWER</u>: A "LODGING" IS ANY PLACE THE RESPONDENT *SLEPT* OVERNIGHT. SOME PEOPLE COME TO LAS VEGAS AT NIGHT JUST TO GAMBLE THROUGH THE NIGHT AND LEAVE THE NEXT DAY. THESE PEOPLE DID NOT "LODGE" ANYWHERE.)**

<u>TYPE OF LODGING</u>
(ALL RESPONDENTS)

HOTEL	93%
MOTEL	3
RV PARK	2
FRIENDS/RELATIVES	2
DAYTRIP/NO LODGING	0

<u>TYPE OF LODGING</u>
(AMONG THOSE WHO STAYED OVERNIGHT)

(N=3586)

HOTEL	94%
MOTEL	3
RV PARK	2
FRIENDS/RELATIVES	2

<u>LOCATION OF LODGING</u>
(ALL RESPONDENTS)

STRIP CORRIDOR	76%
ON THE STRIP	59
JUST OFF THE STRIP	17
DOWNTOWN	5
BOULDER STRIP	3
OUTLYING AREAS	14
OTHER	2

<u>LOCATION OF LODGING</u>
(AMONG THOSE WHO STAYED OVERNIGHT) (N=3586)

STRIP CORRIDOR	76%
ON THE STRIP	60
JUST OFF THE STRIP	17
DOWNTOWN	5
BOULDER STRIP	3
OUTLYING AREAS	14
OTHER	2

24. At what point in your planning did you decide where you would stay? (N=3586)

BEFORE LEAVING HOME ..96%

WHILE EN ROUTE TO LAS VEGAS............................2

AFTER ARRIVAL...................2

NOT SURE/DK 0

REFUSED/NA........................0

25. Which of the following **[SHOW CARD]** best describes how you, or someone in your party, booked your accommodations in Las Vegas? **(ACCEPT ONLY ONE RESPONSE.)**

(N=3472)

Booked by phone, calling the hotel, motel, or RV park directly.........33% Booked through a travel agent (either in person or by phone) ......14 Booked by phone but not by calling the hotel directly and not through a travel agent 3	**SKIP TO Q27**
Booked through a website on the Internet using a desktop or laptop computer.............31 Booked through a website on the Internet using a smartphone.........8 Booked through a website on the Internet using a tablet...................4	**ASK Q26**
Booked in person at the hotel, motel, or RV park.................................1 The trip was a gift, prize, or incentive, so the accommodations were booked for you........2 Not sure because someone else in your party booked the hotel and you don't know how they did it ....4 OTHER (SPECIFY:)........0 REFUSED/NA 0	**SKIP TO Q27**

26. Which website did you use to book your accommodations? **(ASK AS AN OPEN END. ACCEPT ONLY ONE RESPONSE).**

(N=1503)

a. HOTEL WEBSITE (ANY).............41%
b. HOTELS.COM 14
c. EXPEDIA.COM 13
d. LAS VEGAS.COM 4
e. TRAVELOCITY 5
f. AIRLINE WEBSITE........................ 4
g. ORBITZ... 1
h. PRICELINE.COM........................... 3
i. VEGAS.COM 2
j. KAYAK.COM................................. 2
k. HOTWIRE..................................... 3
l. OTHER 8
m. NOT SURE/DK 0

27. How far in advance did you make your reservations for your (hotel room/motel room/RV park space) for this trip to Las Vegas? **(ASK AS OPEN END.)** (N=3472)

SAME DAY...............................2%

1-3 DAYS BEFORE 3

4-6 DAYS BEFORE 6

7-14 DAYS BEFORE 28

15-30 DAYS BEFORE 37

31-60 DAYS BEFORE 12

61-90 DAYS BEFORE 5

MORE THAN 90 DAYS BEFORE........................8

NOT SURE/DK.........................0

REFUSED/NA 0

28. Including yourself, how many people stayed in your room? (N=3453)

ONE....................................11%
TWO....................................73
THREE..................................8
FOUR...................................6
FIVE...................................2
SIX OR MORE............................0
REFUSED/NA.............................0
2.1 MEAN
2.0 MEDIAN

29. Which of the following rate categories best describes your room rate? **(SHOW CARD. ACCEPT ONLY ONE RESPONSE.)** (N=3404)

HOTEL/TRANSPORTATION PACKAGE DEAL.......11% HOTEL/AMENITIES PACKAGE DEAL.......3 TOUR/ TRAVEL GROUP.......4	**ASK Q30**
CONVENTION GROUP/ COMPANY MEETING.......5 CASINO RATE.......4 REGULAR FULL-PRICE ROOM RATE.......33	**SKIP TO Q32**
CASINO COMPLIMENTARY.......18	**SKIP TO Q34**
ANOTHER RATE.......21	**SKIP TO Q32**

30. What was the total PER PERSON cost of your package? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS.)** (N=620)

$0-$99.................................3%
$100-$199..............................8
$200-$299..............................8
$300-$399..............................9
$400-$499..............................13
$500-$999..............................27
$1000 OR MORE..........................27
NOT SURE/REFUSED.......................6
$815.14 MEAN
$550.00 MEDIAN

31. Where did you first hear about this package? **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=620)

NEWSPAPER..............................0%
TELEVISION.............................0
TRAVEL AGENT...........................47
WORD OF MOUTH..........................9
OFFER RECEIVED IN THE MAIL.............1
E-MAIL OFFER...........................1
INTERNET AD............................14
ANY WEBSITE............................20
RESERVATION AGENT/ CALL CENTER.........2
SEARCH ENGINE/ HYPERLINK...............5
OTHER..................................1
NOT SURE/NO ANSWER.....................0

PACKAGE VISITORS SKIP TO Q34

32. **(ASK ONLY OF NON-PACKAGE VISITORS)** By the time you leave Las Vegas, how much will you have spent, *on average per night*, on your hotel or motel room? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)** (N=2166)

$0-$35.................................8%
$36-$50................................16
$51-$100...............................50
$101 OR MORE...........................22
NOT SURE/REFUSED.......................4
$86.55 MEAN
$80.00 MEDIAN

33. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=2166)

NEWSPAPER	0%
TELEVISION	0
RADIO	0
TRAVEL AGENT	6
WORD-OF-MOUTH	16
OFFER RECEIVED IN THE MAIL	2
BROCHURE	1
E-MAIL OFFER	2
INTERNET AD (POP-UP OR BANNER AD)	10
ANY WEBSITE	42
OUTDOOR BILLBOARD	0
RESERVATION AGENT/ CALL CENTER	20
OTHER	0
NOT SURE/DK	0

34. **(ASK OF ALL RESPONDENTS.)** Including yourself, how many *adults* 21 years old or older are in your *IMMEDIATE* party (such as a spouse or friends who are traveling with you)?

1	9%
2	67
3	7
4	12
5 OR MORE	5

2.4 MEAN
2.0 MEDIAN

35. Are there any people *under the age of 21* in your *IMMEDIATE* party?

YES	10%
NO	90

36. By the time you leave, how many nights will you have stayed in Las Vegas? (WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)

0	0%
1	7
2	30
3	28
4	19
5 OR MORE	16

3.2 MEAN
3.0 MEDIAN

37. By the time you leave, how many *days* will you have been in Las Vegas?

1	0%
2	7
3	30
4	28
5	19
6 OR MORE	16

4.2 MEAN
4.0 MEDIAN

38. On what day of the week did you arrive in Las Vegas?

SUNDAY	14%
MONDAY	14
TUESDAY	14
WEDNESDAY	14
THURSDAY	15
FRIDAY	17
SATURDAY	13

39. During your stay in Las Vegas, how many casinos or casino-hotel properties did you visit? If you are staying at a casino-hotel, please include it in your count.

0	0%
1	10
2	7
3	7
4	9
5	15
6	16
7 TO 10	29
MORE THAN 10	6

5.7 MEAN
6.0 MEDIAN

40. At how many of these casinos or casino-hotel properties did you gamble?

0	29%
1	22
2	17
3	11
4	9
5	5
6	4
7 TO 10	3
MORE THAN 10	1

2.1 MEAN
1.0 MEDIAN

41. Have you gambled during this visit to Las Vegas?

YES 71%	**ASK Q42**
NO 29	**SKIP TO Q45**

42. At what point in your planning did you decide where you would gamble? (N=2551)

BEFORE LEAVING HOME 45%

WHILE EN ROUTE TO LAS VEGAS................................ 3

AFTER ARRIVAL...................... 52

NOT SURE/DK 0

REFUSED/NA............................. 0

43. On average, how many hours *PER DAY* did you spend gambling? **(IF GREATER THAN 12, CLARIFY BY ASKING:** "Do you mean that you spent on average **[FILL IN NUMBER OF HOURS]** hours gambling *every day you were here*?" (N=2551)

2 OR LESS.......................... 60%
- LESS THAN 1 HOUR....... 17
- ONE HOUR 21
- TWO HOURS 23

3 TO 4.................................. 22
5 TO 6.................................. 11
7 TO 8.................................... 6
9 TO 10.................................. 1
MORE THAN 10.................... 0

<u>2.6</u> MEAN
<u>3.0</u> MEDIAN

44. Not including travel, food, or lodging, how much money did you budget for gambling on this trip? Include only your own, personal, gambling budget and not the gambling budgets of others who may have been with you. (N=2551)

$0-$99.. 15%
$100-$199.. 18
$200-$299.. 12
$300-$399.. 11
$400-$499.. 7
$500-$599.. 12
$600 OR MORE................................ 22
NOT SURE/REFUSED 4

<u>$530.11</u> MEAN
<u>$300.00</u> MEDIAN

45. **(ASK OF EVERYONE.)**
Now that there are more places to gamble outside of Las Vegas, do you feel you are MORE LIKELY or LESS LIKELY to visit Las Vegas, or does it make NO DIFFERENCE in your decision to visit Las Vegas? **(IF MORE OR LESS LIKELY, ASK:)** Is that MUCH (more/less likely) or SOMEWHAT (more/less likely)?

5 -MUCH MORE LIKELY 10%
4 -SOMEWHAT MORE LIKELY...... 15
3 -NO DIFFERENCE 75
2 -SOMEWHAT LESS LIKELY 1
1 -MUCH LESS LIKELY.................... 0
NOT SURE/DK................................. 0
REFUSED/NA 0

<u>3.3</u> MEAN
<u>3.0</u> MEDIAN

46. Which of the following types of entertainment have you seen during this trip to Las Vegas? **(START WITH ITEM CHECKED AND CONTINUE UNTIL ALL ITEMS ARE ASKED. ASK BUT DO NOT ROTATE "OTHER". ACCEPT MULTIPLE RESPONSES.)**

47. **(ASK FOR EVERY "YES" IN Q46.)** And how many **(INSERT EACH TYPE MENTIONED IN Q43)** have you seen during this trip? **(RECORD TWO-DIGIT NUMBER IN APPROPRIATE BLANKS.)**

	Q46				Q47	
	YES	NO	DK	NA	MEAN	
A. Big-name headliner performers in Las Vegas for a special concert (for example, Garth Brooks, Elton John, David Copperfield, Jay Leno, The Eagles, etc.)	11%	89%	0%	0%	1.1	(N=392)
B. Broadway/production shows	22	78	0	0	1.2	(N=805)
C. Comedy shows or revues (for example, Improv, Comedy Stop, etc.)	6	94	0	0	1.2	(N=229)
D. Lounge acts or other kinds of free entertainment provided at a location other than the "main" show room	50	50	0	0	1.7	(N=1812)

48. **(INTERVIEWER: IF RESPONDENT HAS NOT SEEN ANY SHOWS, CIRCLE "YES" HERE.)**

YES (HAS *NOT* SEEN ANY SHOWS)	NO (HAS SEEN SHOWS)
35%	65%

49. At what point in your planning did you decide which shows you would see? (N=2349)

- BEFORE LEAVING HOME 37%
- WHILE EN ROUTE TO LAS VEGAS 2
- AFTER ARRIVAL 61
- NOT SURE/DK 0
- REFUSED/NA 0

50. **(ASK THOSE WHO DID NOT GO TO SHOWS:)** What was the *main* reason you didn't go to *any* shows, revues, or acts during your stay in Las Vegas? **(ACCEPT ONLY ONE RESPONSE.)** (N=1250)

- TOO BUSY/NO TIME 61%
- NOT INTERESTED 25
- CAME TO GAMBLE 2
- ALREADY SAW SHOWS 1
- TOO EXPENSIVE 7
- HAVE CHILDREN WITH US 1
- SHOWS SOLD OUT OR CLOSED 1
- OTHER 2

51. On this trip to Las Vegas, have you been to other Las Vegas attractions for which you have to pay — for example, the Mandalay Bay Shark Reef, the Stratosphere Observation Tower and Rides, New York New York "Manhattan Express" rollercoaster, etc.?

- YES 19%
- NO 81
- NOT SURE/DK 0
- REFUSED/NA 0

52. On this trip, will you (or did you) visit... **(READ LIST. ACCEPT MULTIPLE RESPONSES.)**

- A. A nightclub in a hotel with a cover charge? 8%
- B. A free-standing nightclub with a cover charge? 2
- C. A bar or lounge in a hotel without a cover charge? 45
- D. Any free-standing bar or lounge without a cover charge? 2
- E. A pool party or day club? 2

53. Will you (or did you) visit other areas of Nevada or the surrounding area (for example, the Grand Canyon and Death Valley), either before or after this visit to Las Vegas?

- YES 17%
- NO 83

54. **(ASK THOSE WHO VISITED NEARBY PLACES:)** On this trip, will you (or did you) visit... **(READ LIST. ACCEPT MULTIPLE RESPONSES.)** (N=619)

Hoover Dam	46%
Grand Canyon	61
Lake Mead	7
Laughlin	3
Zion National Park	18
Death Valley	12
Bryce Canyon	14
Red Rock Canyon	4
Primm. NV	0
Mt. Charleston/Lee Canyon	2
Valley of Fire	9
Mesquite, NV	1
All other responses	2

55. Did you visit a spa while in Las Vegas? By spa we mean a place that typically offers hair, skin, and body care, facials, massage, manicures, pedicures, etc.?

YES	7%
NO	93

56. During your current visit to Las Vegas, did you – or will you – participate in any wellness-related activities, such as hiking, mountain climbing, cycling, fitness walking, jogging, yoga, or meditation?

YES	7%
NO	93

57. By the time you leave Las Vegas, how much will you have spent *ON AVERAGE PER DAY* for...

a. Food and drink. Please include only your own, personal expenses and not those of your entire party. **(ROUND TO THE NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

$281.88 MEAN (INCLUDING $0)
$286.78 MEAN (EXCLUDING $0)

b. Local transportation (for example, car rental, taxi, limo, gas). Please include all your daily transportation expenses. **(ROUND TO THE NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

$68.83 MEAN (INCLUDING $0)
$114.55 MEAN (EXCLUDING $0)

58. By the time you leave Las Vegas, how much will you have spent on each of the following items *IN TOTAL FOR YOUR ENTIRE TRIP*? Please include only your own, personal expenses and not those of your entire party. **(READ EACH ITEM. ROUND TO THE NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

A. Shopping (gifts, clothing, personal items)	$149.77	MEAN (INCLUDING $0)
	$246.12	MEAN (EXCLUDING $0)
B. Shows/entertainment (not including gambling)	$47.56	MEAN (INCLUDING $0)
	$138.33	MEAN (EXCLUDING $0)
C. Sightseeing	$14.49	MEAN (INCLUDING $0)
	$125.63	MEAN (EXCLUDING $0)
X. Other	$5.97	MEAN (INCLUDING $0)
	$281.13	MEAN (EXCLUDING $0)

Just a few more questions on your impressions of Las Vegas in general…

59. Overall, how satisfied were you with your visit to Las Vegas? Were you... (READ LIST.)

Very satisfied	96%
Somewhat satisfied	4
Somewhat dissatisfied	0
Very dissatisfied	0
DO NOT READ	
NOT SURE/DK	0
REFUSED/NA	0

60. **(ASK OF THOSE WHO WERE "SOMEWHAT" SATISFIED:)** You just said you were *somewhat* satisfied with your overall experience in Las Vegas. What is the *MAIN* reason that keeps you from saying you were *very* satisfied? (N=149)

Hotel complaints	16%
Trip was too short	28
Too expensive	13
Too hot	3
Bad weather (other than heat)	1
Here for business, not pleasure/ not enough free time	7
Too crowded	3
Too hard to get around	1
Don't like Las Vegas	4
Problems with trip to Las Vegas	2
Smoking complaints	3
Gambling complaints	10
Other	10
Don't Know/No Answer	0

61. **(ASK OF THOSE WHO WERE DISSATISFIED:)** What is the *MAIN* reason you were dissatisfied with your overall experience in Las Vegas? **(ACCEPT ONLY ONE RESPONSE.)** (N=10)

Hotel complaints	14%
Too expensive	29
Too intense/too much going on	21
Too crowded	6
Someone in party got sick	8
Rude/unfriendly people	6
Trip was too short	17
Other	0
Don't Know/No Answer	0

Now I'd like to ask you a few final questions for statistical purposes.

62. Are you currently... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)**

Employed	64%	**ASK Q62**
Unemployed	3	**SKIP TO Q63**
Student	3	
Retired	20	
Homemaker	11	
DO NOT READ		
REFUSED/NA	0	**SKIP TO Q63**

63. What is your occupation? **(SPECIFY OCCUPATION, NOT TITLE OR COMPANY NAME. "SELF EMPLOYED" IS NOT AN ACCEPTABLE RESPONSE. PROBE FOR THE TYPE OF WORK DONE.)** (N=2292)

Professional/technical	29%
Managers/proprietors	17
Sales/clerical	27
Craft workers	8
Service workers	19
Laborers (non-agricultural)	0
Agricultural	0

64. What was the last grade or year of school that you completed? **(DO NOT READ LIST.)**

GRADE SCHOOL OR SOME HIGH SCHOOL 0%
HIGH SCHOOL DIPLOMA (FINISHED GRADE 12) 11
SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE) 37
GRADUATED COLLEGE 40
GRADUATE SCHOOL (MASTER'S OR PH.D.) 8
TECHNICAL, VOCATIONAL, OR TRADE SCHOOL 4
REFUSED/NA 0

65. What is your marital status? Are you... **(READ FIRST 4 ITEMS IN LIST.)**

Married 80%
Single 14
Separated or divorced 4
Widowed 2
REFUSED/NA 0

66. What country do you live in?

USA 81%	**ASK Q66**
FOREIGN 19	**SKIP TO Q67**

67. What is your zip code, please?
REGION FROM ZIP CODE

EAST 7%
SOUTH 12
MIDWEST 9
WEST 53
CALIFORNIA 33
NORTHERN CA. 6
SOUTHERN CA. 27
ARIZONA 6
OTHER WEST 14
FOREIGN VISITORS 19

68. **(ETHNICITY BY OBSERVATION. IF UNSURE, ASK:)** Most people think of themselves as belonging to a particular ethnic or racial group. What ethnic or racial group are you a member of? (**ASK ONLY IF NECESSARY:** Are you white, Black or African American, Asian or Asian American, Hispanic or Latino — or of some other ethnic or racial background?)

WHITE 77%
BLACK OR AFRICAN AMERICAN 4
ASIAN OR ASIAN AMERICAN 10
HISPANIC/LATINO 8
NATIVE AMERICAN, MIXED RACE, OTHER 1

69. What is your age, please? **(RECORD IT EXACTLY *AND CIRCLE APPROPRIATE CATEGORY BELOW*.)**

45.2 MEAN
43.0 MEDIAN

Which of the following categories does your age fall into? **(READ LIST.)**

21 to 29 .... 17%
30 to 39 27
40 to 49 20
50 to 59 14
60 to 64 8
65 and older 15
REFUSED/NA 0

70. Please tell me which one of these categories includes your total household income before taxes last year. **(SHOW INCOME CARD.)** Include your own income and that of any member of your household who is living with you.

A. Less than $20,000 .... 1%
B. $20,000 to $29,999 2
C. $30,000 to $39,999 5
D. $40,000 to $49,999 11
E. $50,000 to $59,999 15
F. $60,000 to $69,999 16
G. $70,000 to $79,999 11
H. $80,000 to $89,999 13
I. $90,000 to $99,999 4
J. $100,000 to $149,999 14
K. $150,000 or more 1
NOT SURE/NO ANSWER 7

CARD A

HOTEL/MOTEL RATES

1. **HOTEL/TRANSPORTATION PACKAGE DEAL**
   One price that includes your hotel room ***and*** airfare or bus transportation to Las Vegas. The package may or may not also include other items such as shows or meals.

2. **HOTEL/AMENITIES PACKAGE DEAL (NO TRANSPORTATION INCLUDED)**
   One price that includes your hotel room ***and*** other items such as shows, meals, or other amenities, but ***does not*** include airfare or bus transportation to Las Vegas.

3. **TOUR/TRAVEL GROUP**
   You are traveling as part of a tour or travel group. The tour/travel group package price includes room ***and*** airfare or bus transportation to Las Vegas. The package may or may not also include other items such as shows or meals.

4. **CONVENTION GROUP/COMPANY MEETING**
   Arranged through an employer or convention.

5. **CASINO RATE**
   Special reduced rate arranged through a casino host or casino employee.

6. **REGULAR FULL-PRICE ROOM RATE**
   Full price, no discounts.

7. **CASINO COMPLIMENTARY**
   Room is free of charge.

8. **ANOTHER RATE**
   Any other special room rate not shown above.

INCOME CATEGORIES

A. Less than $20,000

B. $20,000 to $29,999

C. $30,000 to $39,999

D. $40,000 to $49,999

E. $50,000 to $59,999

F. $60,000 to $69,999

G. $70,000 to $79,999

H. $80,000 to $89,999

I. $90,000 to $99,999

J. $100,000 to $109,999

K. $110,000 to $119,999

L. $120,000 to $129,999

M. $130,000 to $139,999

N. $140,000 to $149,999

O. $150,000 or more

Las Vegas Convention and Visitors Authority
3150 Paradise Road, Las Vegas, NV 89109-9096
LasVegas.com

For additional research publications and statistics, visit LVCVA.com.