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Suite 400
San Francisco, CA 94107
Telephone: (415) 974-6620
Facsimile: (415) 947-0260
www.glsresearch.com

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Las Vegas

LAS VEGAS VISITOR PROFILE

Calendar Year 2018

Airline Visitor Version

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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TABLE OF CONTENTS

	<u>Page</u>
EXECUTIVE SUMMARY	1
INTRODUCTION	4
METHODOLOGY	5
SUMMARY OF FINDINGS	7
Reasons For Visiting	7
Travel Planning	16
Trip Characteristics And Expenditures	34
Gaming Behavior And Budgets	52
Entertainment.....	58
Attitudinal Information	65
VISITOR DEMOGRAPHICS	67

TABLE OF FIGURES

	<u>Page</u>
<u>REASONS FOR VISITING</u>	
FIGURE 1: First Visit Vs. Repeat Visit	7
FIGURE 2: Frequency Of Visits In Past Year	8
FIGURE 3: Frequency Of Visits In Past Year (Repeat Visitors)	9
FIGURE 4: Primary Purpose Of Current Visit	10
FIGURE 5: Primary Purpose Of Current Visit (Repeat Visitors)	11
FIGURE 6: Primary Purpose Of Current Visit (First-Time-Visitors)	12
FIGURE 7: Conventions/Trade Shows/Association/Corporate Meetings	13
FIGURE 8: Interest In Attending Conventions, Trade Shows, Association, Or Corporate Meetings In Las Vegas	14
FIGURE 9: Whether Brought Someone Else Who Did Not Attend Conventions, Trade Shows, Association, Or Corporate Meetings In Las Vegas.....	15
<u>TRAVEL PLANNING</u>	
FIGURE 10: Advance Travel Planning	16
FIGURE 11: Local Transportation	17
FIGURE 12: When Decided Where To Stay	18
FIGURE 13: When Decided Where To Gamble	19
FIGURE 14: When Decided Which Shows To See	20
FIGURE 15: Travel Agent Assistance.....	21
FIGURE 16: Travel Agent Influence And Use	22
FIGURE 17: Tools Used In Planning Trip To Las Vegas	23
FIGURE 18: Social Media And Travel Review Apps Used In Planning Trip To Las Vegas	24
FIGURE 19: How Booked Flight To Las Vegas	25
FIGURE 20: Web Site Used To Book Transportation.....	26
FIGURE 21: Web Site Used To Book Accommodations	27
FIGURE 22: Social Media And Travel Review Apps Used During Current Trip To Las Vegas	28
FIGURE 23: Whether Visited Downtown Las Vegas	29
FIGURE 24: Main Reason For Visiting Downtown Las Vegas	30
FIGURE 25: Main Reason For Not Visiting Downtown Las Vegas	31
FIGURE 26: Visits To Nearby Places	32
FIGURE 27: Other Nearby Places Visited.....	33
<u>TRIP CHARACTERISTICS AND EXPENDITURES</u>	
FIGURE 28: Adults In Immediate Party	34
FIGURE 29: Whether Has Persons In Party Under Age 21	35

TABLE OF FIGURES

(continued/2)

	<u>Page</u>
FIGURE 30: Nights Stayed.....	36
FIGURE 31: Days Stayed.....	36
FIGURE 32: Day Of Arrival.....	37
FIGURE 33: Type Of Lodging.....	38
FIGURE 34: Location Of Lodging.....	39
FIGURE 35: How Booked Accommodations In Las Vegas.....	40
FIGURE 36: Advance Booking Of Accommodations.....	41
FIGURE 37: Type Of Room Rates	42
FIGURE 38: Package Purchasers.....	43
FIGURE 39: Cost of Package Per Person	44
FIGURE 40: Lodging Expenditures — Average Per Night.....	45
FIGURE 41: How First Found Out About Room Rate	46
FIGURE 42: Number Of Room Occupants.....	47
FIGURE 43: Average Trip Expenditures On Food & Drink — And On Local Transportation (Including Visitors Who Spent Nothing)	48
FIGURE 44: Average Trip Expenditures On Food & Drink — And On Local Transportation (Among Spenders)	49
FIGURE 45: Average Trip Expenditures On Shopping, Shows, and Sightseeing (Including Visitors Who Spent Nothing)	50
FIGURE 46: Average Trip Expenditures On Shopping, Shows, and Sightseeing (Among Spenders)	51
 <u>GAMING BEHAVIOR AND BUDGETS</u>	
FIGURE 47: Whether Gambled While In Las Vegas.....	52
FIGURE 48: Hours Of Gambling — Average Per Day	53
FIGURE 49: Number Of Casinos Visited	54
FIGURE 50: Number Of Casinos Where Gambled	55
FIGURE 51: Trip Gambling Budget	56
FIGURE 52: Where Visitors Gambled	57
 <u>ENTERTAINMENT</u>	
FIGURE 53: Attended A Show.....	58
FIGURE 54: Types Of Entertainment	59
FIGURE 55: Average Number Of Shows Attended.....	60
FIGURE 56: Main Reason For Not Attending Any Shows	61
FIGURE 57: Whether Has Been To Other Paid Attractions	62
FIGURE 58: Whether Has Been To Nightclubs, Bars, And Lounges.....	63
FIGURE 59: Whether Visited A Spa	64

TABLE OF FIGURES
(continued/3)

	<u>Page</u>
<u>ATTITUDINAL INFORMATION</u>	
FIGURE 60: Satisfaction With Visit	65
FIGURE 61: Why Not Completely Satisfied With Visit.....	66
<u>VISITOR DEMOGRAPHICS</u>	
FIGURE 62: Visitor Demographics	68
FIGURE 63: Visitor Demographics	69

EXECUTIVE SUMMARY

The Las Vegas Visitor Profile Study is conducted monthly and reported annually to provide an ongoing assessment of the Las Vegas visitor and trends in visitor behavior over time.

This report presents the findings from the 3,600 personal interviews conducted by GLS Research throughout calendar year 2018.

The focus of this report is an analysis of airline visitors compared to those who arrived by ground transportation. These two subgroups are defined as including visitors who arrived by:

- **AIRLINE** — those who arrived in Las Vegas by regularly scheduled, charter, or private airline — 48% of all visitors.
- **GROUND TRANSPORTATION** — those who arrived in Las Vegas by automobile, RV, truck, motorcycle, or bus — 52% of all visitors.

This section presents the research highlights. The findings are presented in detail beginning on page 7.

AIRLINE VISITORS

Were more likely than those who arrived by ground transportation to have:

- Been making their first visit to Las Vegas (22%).
- Visited primarily for vacation or pleasure (54%) or for a convention, trade show or corporate meeting (13%).
- Planned their trip to Las Vegas more than two months in advance (61%).
- Used many forms of local transportation, including a taxi (50%), a ride-sharing service (37%), the monorail (22%), a hotel/motel shuttle (17%), and/or ridden a bus (31%).
- Used websites (62%), social media (47%), or a travel agent (15%) to plan their trip.
- Visited Downtown Las Vegas (50%).
- Lodged in a hotel (91%) and on the Strip Corridor* (86%).
- Booked their accommodations through a third party website (33%) or through a travel agent (16%).
- Received a package (25%) or convention rate (10%) for their room.
- Stayed longer in Las Vegas (4.0 nights).
- Gambled while in Las Vegas (81%) and budgeted more on average (\$634.21) for gambling.
- Seen a show during their visit (70%).

During their visit to Las Vegas airline visitors spent an average of:

- \$402.51 on food and drink.
- \$196.05 on shopping.
- \$68.97 on shows and entertainment.

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

THOSE WHO ARRIVED IN LAS VEGAS BY GROUND TRANSPORTATION

Were more likely than airline visitors to have:

- Visited Las Vegas before (86%).
- Visited Las Vegas more frequently in the past 12 months (average of 1.6 visits).
- Visited Las Vegas primarily to visit friends or relatives (20%), to gamble, or for business purposes other than a convention or corporate meeting (9% each).
- Booked their accommodations less than one month in advance (54%).
- Lodged in outlying areas (18%).
- Booked their accommodations by calling the property directly (24%) or in person (8%).
- More people staying in their room (2.1).
- People under 21 in their party (8%).
- Received a regular room rate (44%), a casino complimentary rate (15%), or another special rate (25%).
- Been to a free-standing bar or lounge with no cover charge (21%).

During their visit to Las Vegas those visitors who arrived by ground transportation spent an average of:

- \$235.46 on food and drink.
- \$116.97 on shopping.
- \$32.49 on shows and entertainment.

INTRODUCTION

The Las Vegas Visitor Profile Study is conducted monthly, and reported annually, to provide an ongoing assessment of the Las Vegas visitor and trends in visitor behavior over time.

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.

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 2018. 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 at the McCarran International Airport. 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.

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.

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 2018, 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 for a particular measure is larger (or smaller) we mean that there is a 95% or better chance that the difference is the result of a true difference between the subgroups and is not due to sampling error alone. This is a commonly accepted standard for statistical

significance testing in market and public opinion research. We do not note any subgroup differences that do not meet this standard for statistical significance.

This report presents the results of the 2018 study. Statistically significant differences in the behavior, attitudes, and opinions of visitors who arrived in Las Vegas by air and those who arrived by ground transportation are pointed out in the text of the report.

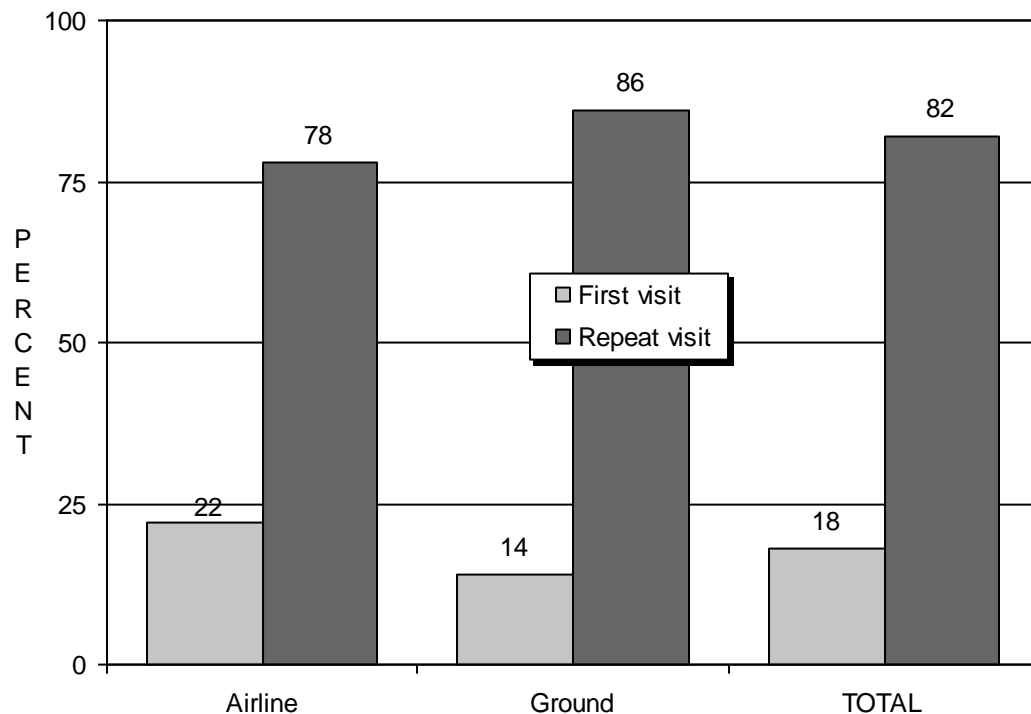
In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2018. These questions will be rotated back into the questionnaire in Calendar Year 2019 and subsequently asked every other year. These questions are noted in 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

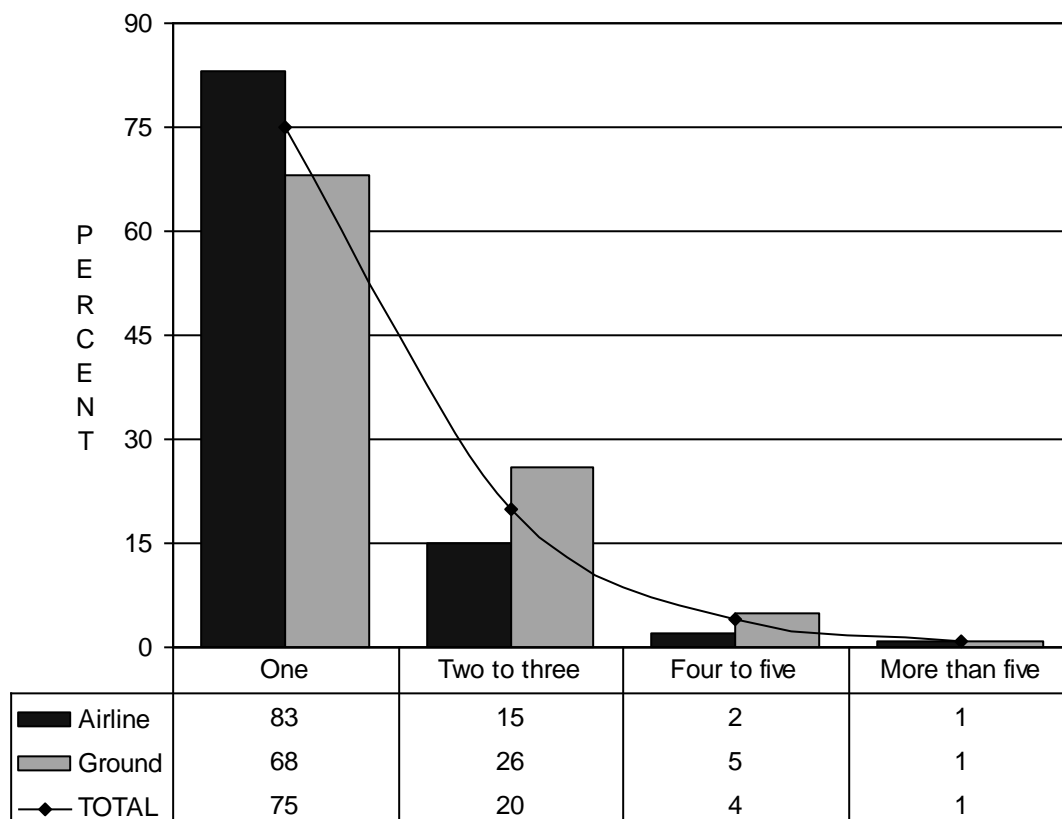
REASONS FOR VISITING

FIGURE 1
First Visit Vs. Repeat Visit



Eighteen percent (18%) of visitors were first-time visitors to Las Vegas and 82% were repeat visitors. Airline visitors were more likely to be making their first trip to Las Vegas (22%) than those who arrived by ground transportation (14%).

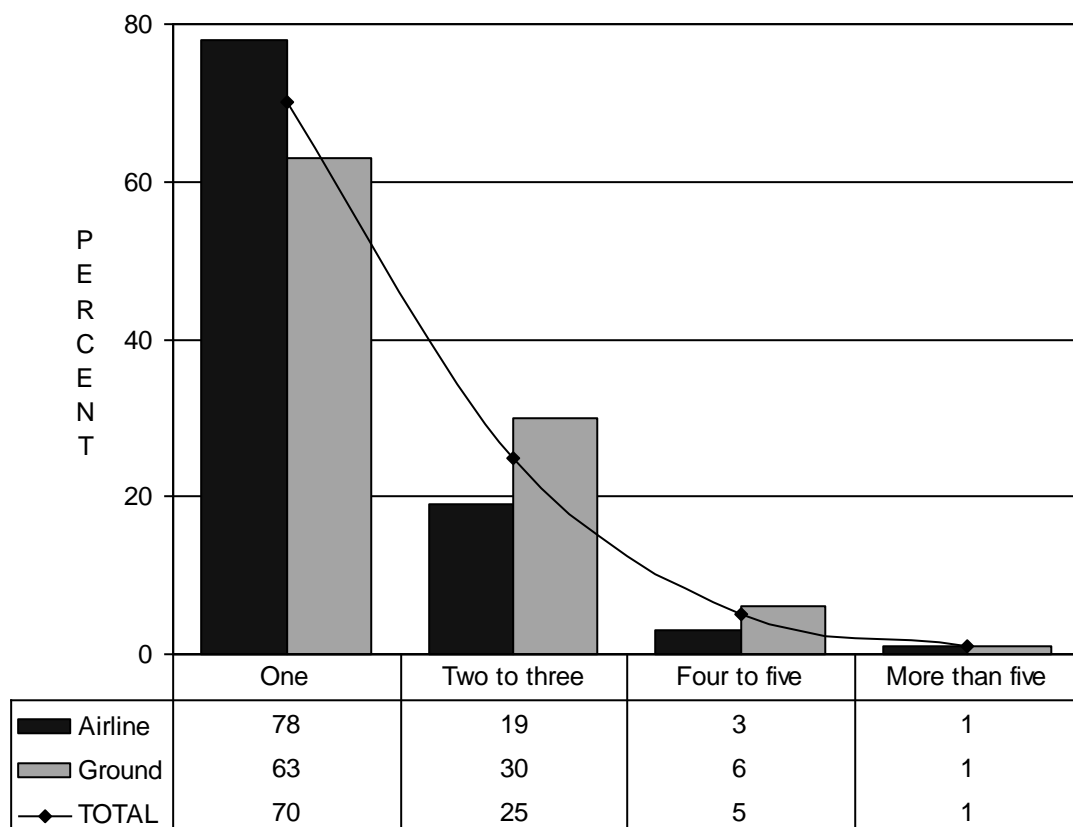
FIGURE 2
Frequency Of Visits In Past Year
(Among All Visitors)



(Means: Airline=1.3, Ground=1.6, TOTAL=1.5)

Airline visitors (83%) were more likely than those who traveled to Las Vegas by ground transportation (68%) to have visited only once in the past year. The average number of visits over the past year was higher for those who arrived by ground transportation (1.6) than it was for airline visitors (1.3).

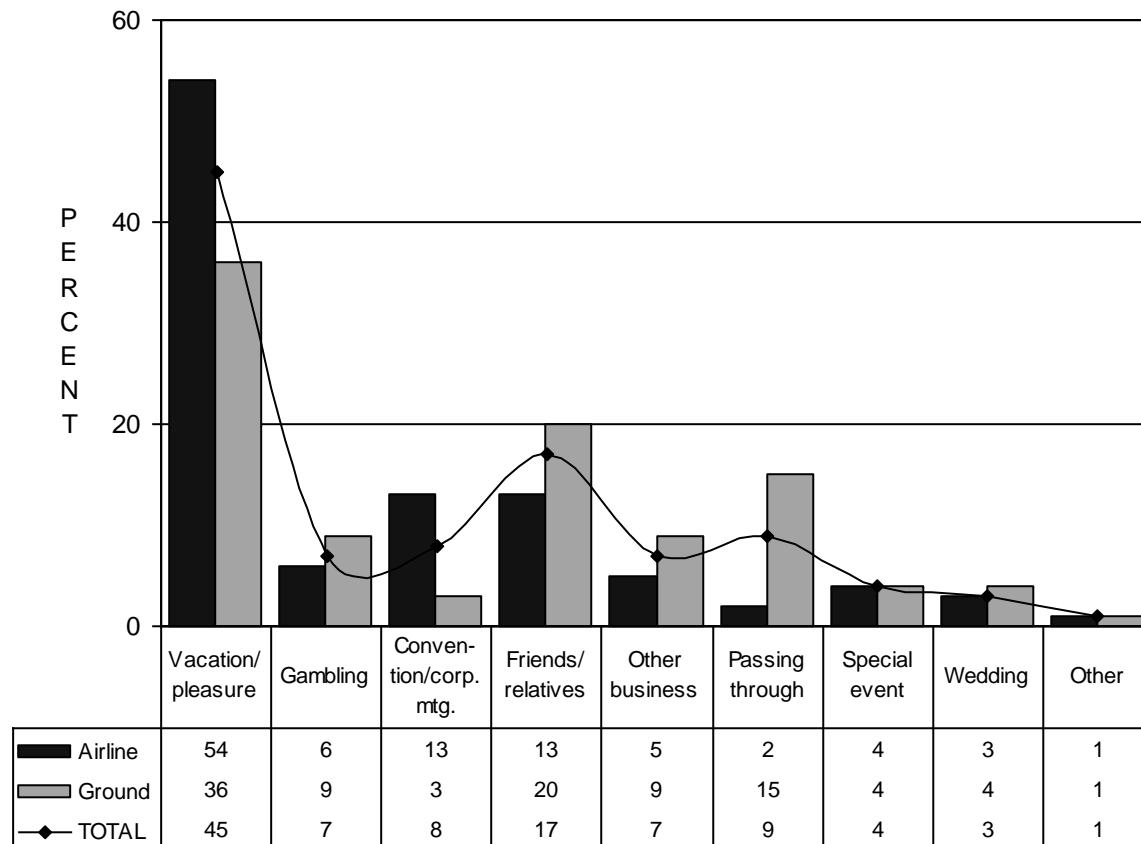
FIGURE 3
Frequency Of Visits In Past Year
(Among Repeat Visitors)



(Base Sizes: Airline=1339, Ground=1624, TOTAL=2963)
(Means: Airline=1.4, Ground=1.7, TOTAL=1.6)

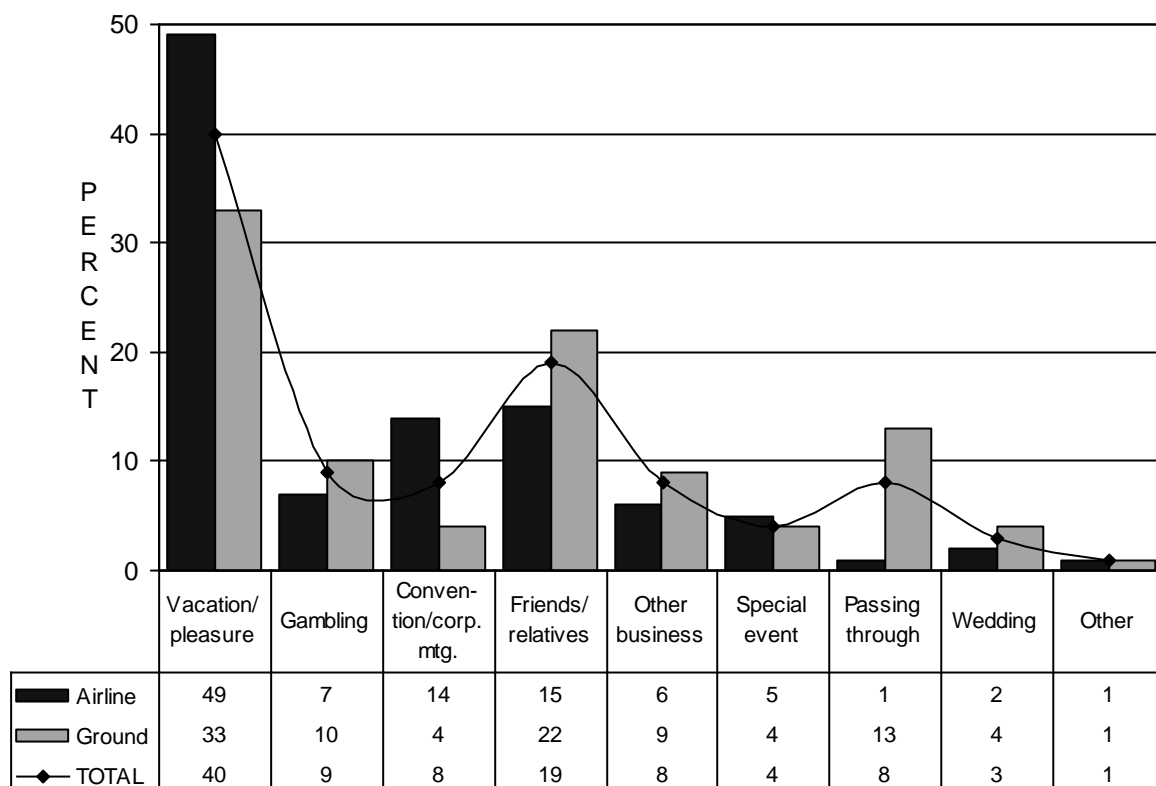
Among visitors who had visited Las Vegas before, airline visitors (78%) were more likely than those who traveled to Las Vegas by ground transportation (63%) to have visited only once in the past year. The average number of visits was higher for those visitors who arrived by ground transportation (1.7) than it was for airline visitors (1.4).

FIGURE 4
Primary Purpose Of Current Visit
(Among All Visitors)



Looking at the primary purpose of the current visit among all visitors, airline visitors (54%) were more likely than those who arrived by ground transportation (36%) to say the primary purpose of their current trip was for vacation or pleasure. Airline visitors were also more likely than those who arrived by other means to say that the primary purpose of their current trip was to attend a convention or corporate meeting (13% vs. 3%). Visitors who arrived by ground transportation were more likely than airline visitors to say they visited Las Vegas primarily to visit friends or relatives (20% vs. 13%), to gamble (9% vs. 6%), for business purposes other than a convention or corporate meeting (9% vs. 5%), or to say they were just passing through Las Vegas (15% vs. 2%).

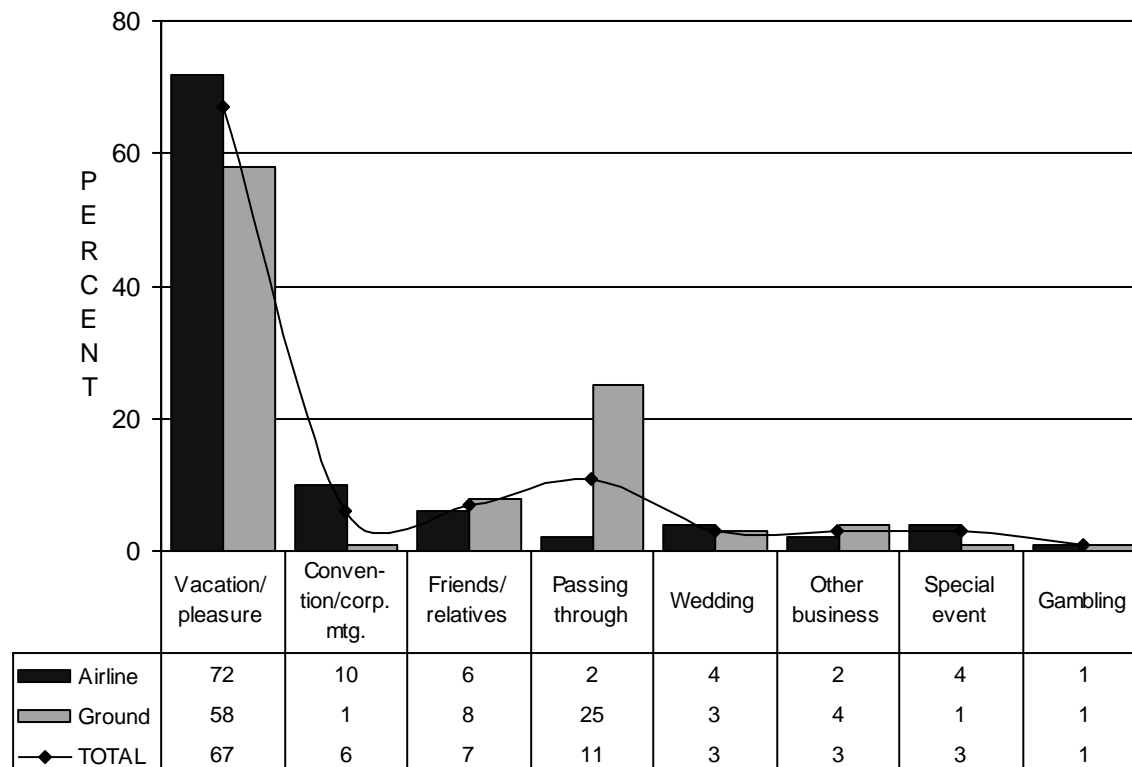
FIGURE 5
Primary Purpose Of Current Visit
(Among Repeat Visitors)



(Base Sizes: Airline=1339, Ground=1624, TOTAL=2963)

Looking only at those visitors who had been to Las Vegas before, airline visitors (49%) were more likely than those who arrived by other means (33%) to say they were visiting for vacation or pleasure. Airline visitors (14%) were also more likely than those who arrived by other means (4%) to say their current visit had been primarily to attend a convention or corporate meeting. Visitors who arrived by ground transportation were more likely than airline visitors to say their current visit had been to visit friends or relatives (22% vs. 15%), to gamble (10% vs. 7%), for business purposes other than a convention or corporate meeting (9% vs. 6%), to attend a wedding or get married (4% vs. 2%), or to say they were just passing through Las Vegas (13% vs. 1%).

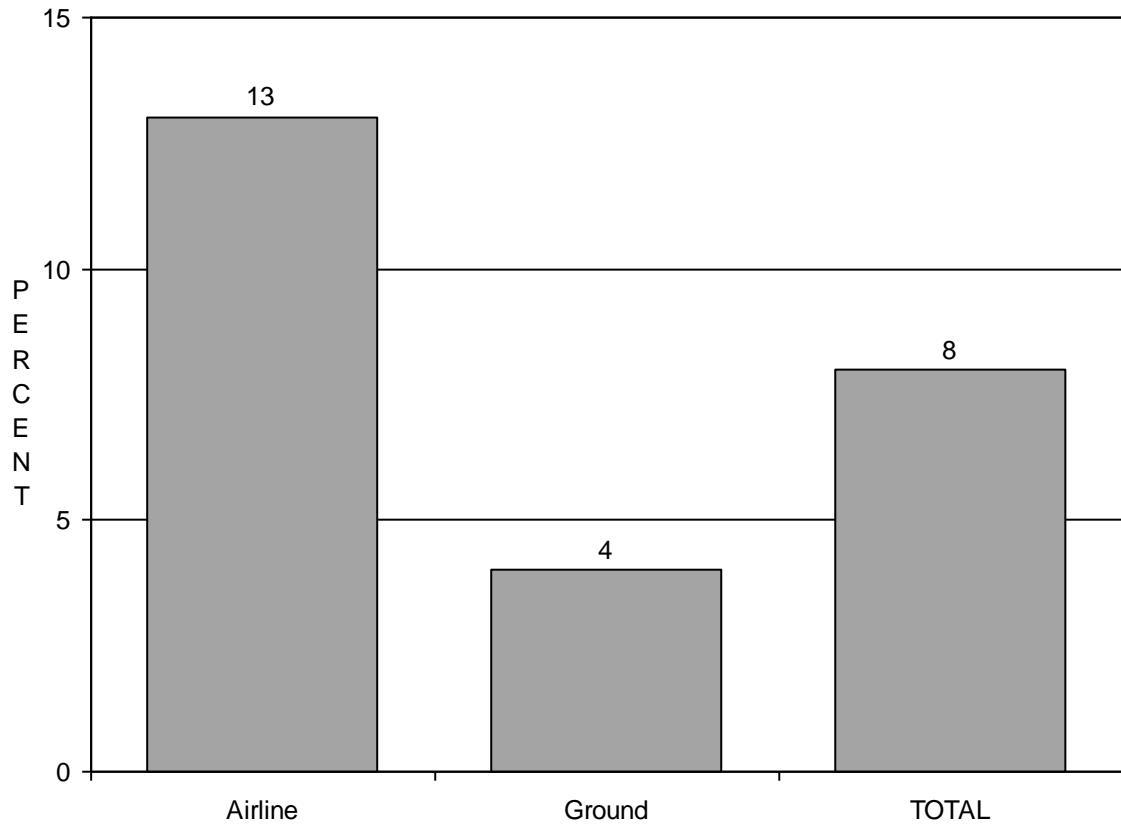
FIGURE 6
Primary Purpose Of Current Visit
(Among First-Time Visitors)



(Base Sizes: Airline=374, Ground=261, TOTAL=636)

We also looked at the purpose of the current visit among visitors who were making their first trip to Las Vegas. Two-thirds (67%) of first-time visitors said they were visiting for vacation or pleasure. Airline visitors were more likely than those who arrived by ground transportation to say their current visit was for vacation or pleasure (72% vs. 58%), that they were visiting for a convention or corporate meeting (10% vs. 1%), or for a special event (4% vs. 1%). Visitors who arrived by ground transportation were more likely than airline visitors to say they were just passing through Las Vegas (25% vs. 2%).

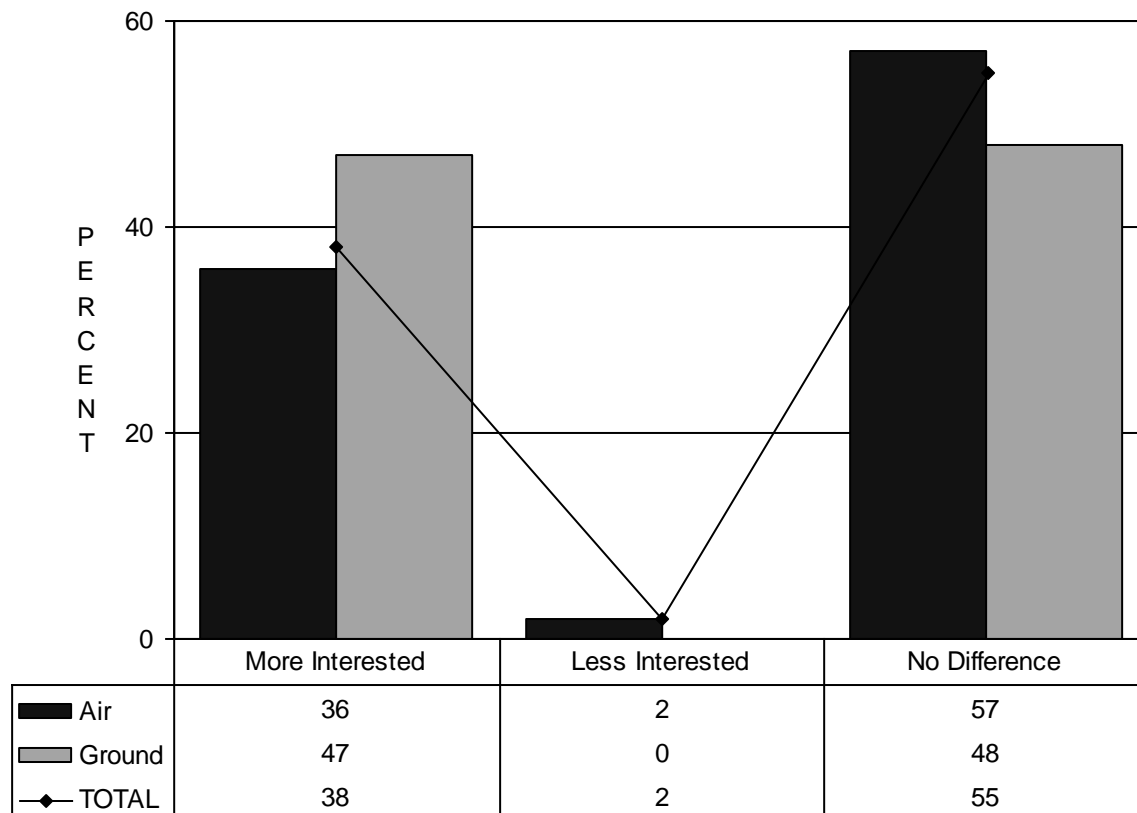
FIGURE 7
Conventions/Trade Shows/Association/Corporate Meetings



Only "yes" responses are reported in this figure.

Respondents were asked if they had attended a convention, trade show, corporate meeting or association while they were in Las Vegas. Airline visitors (13%) were more likely than those who arrived by ground transportation (4%) to say they had.

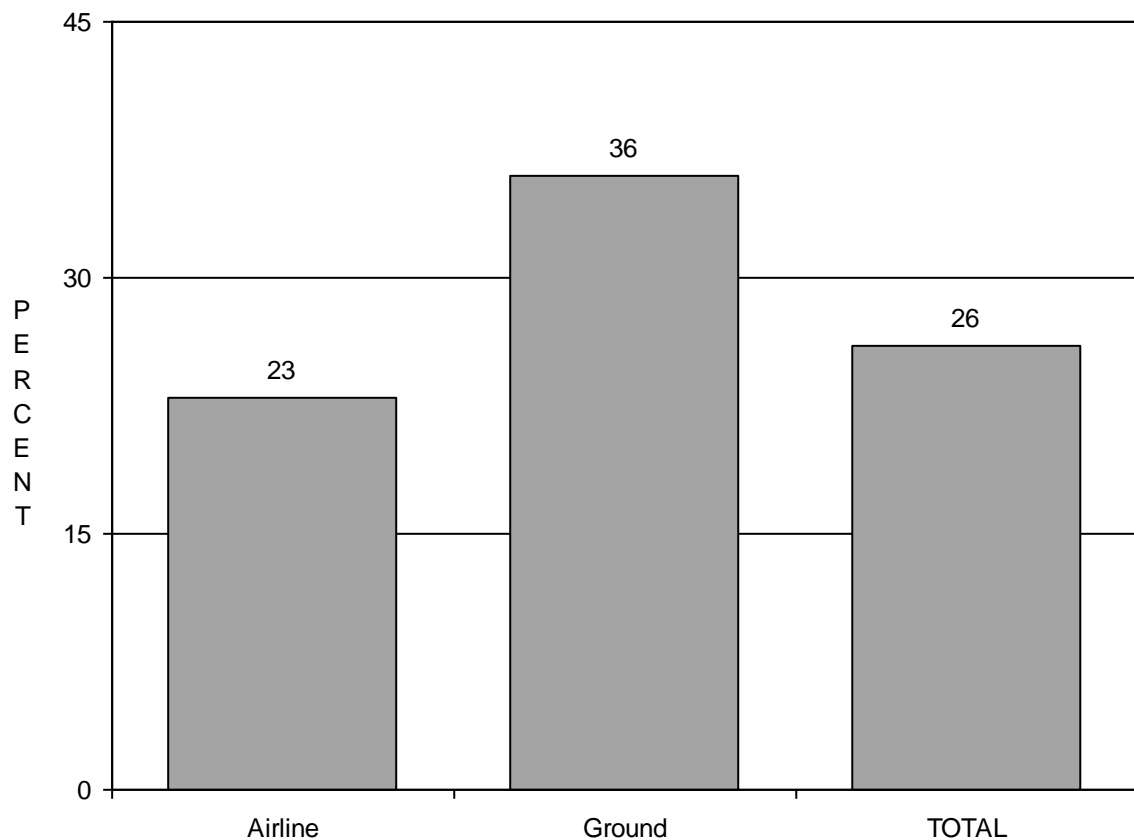
FIGURE 8
Interest In Attending Conventions, Trade Shows, Association Or Corporate Meetings In Las Vegas
(Among Visitors Who Attended A Convention, Trade Show, Association, Or Corporate Meeting)



(Base Sizes: Air=224, Ground=71, TOTAL=295)

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. Thirty-eight percent (38%) said having the convention in Las Vegas made them more interested in attending while 55% said it made no difference and 2% said it made them less interested in attending.

FIGURE 9
Whether Brought Someone Else Who Did Not Attend Conventions,
Trade Shows, Association, Or Corporate Meetings In Las Vegas
(Among Visitors Who Attended A Convention,
Trade Show, Association, Or Corporate Meeting)



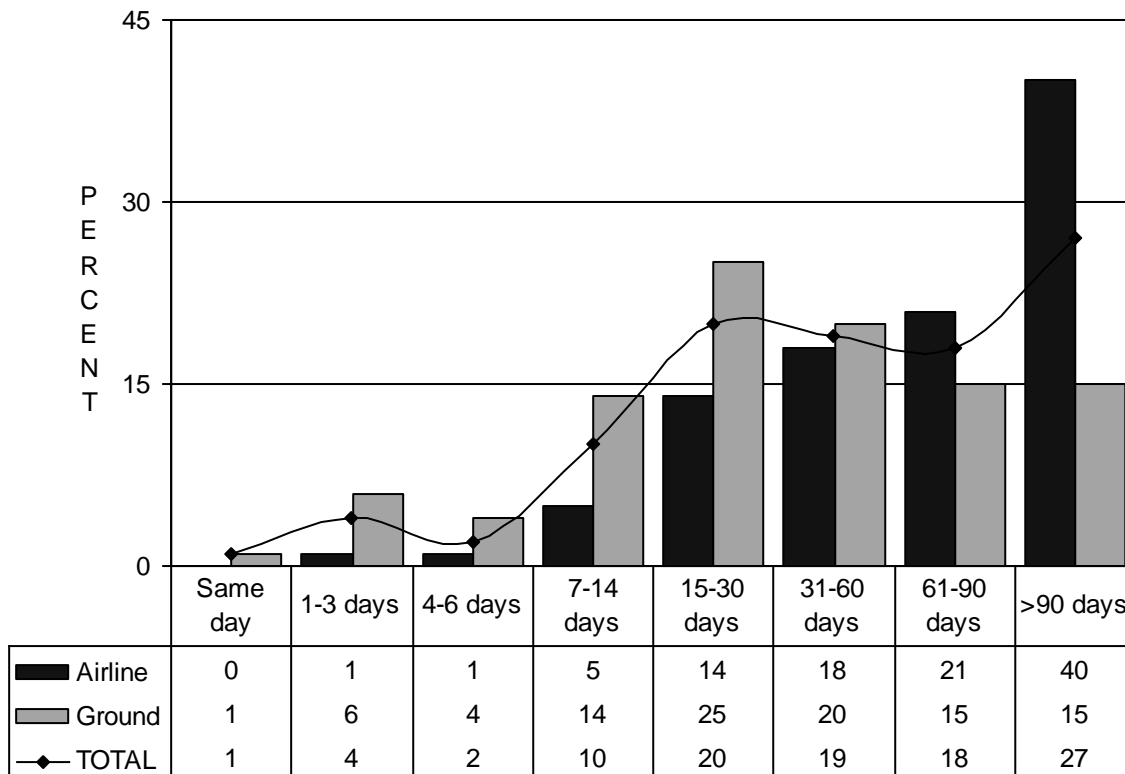
(Base Sizes: Air=224, Ground=71, TOTAL=295)

Only "yes" responses are reported in this figure.

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, and 26% said they had.

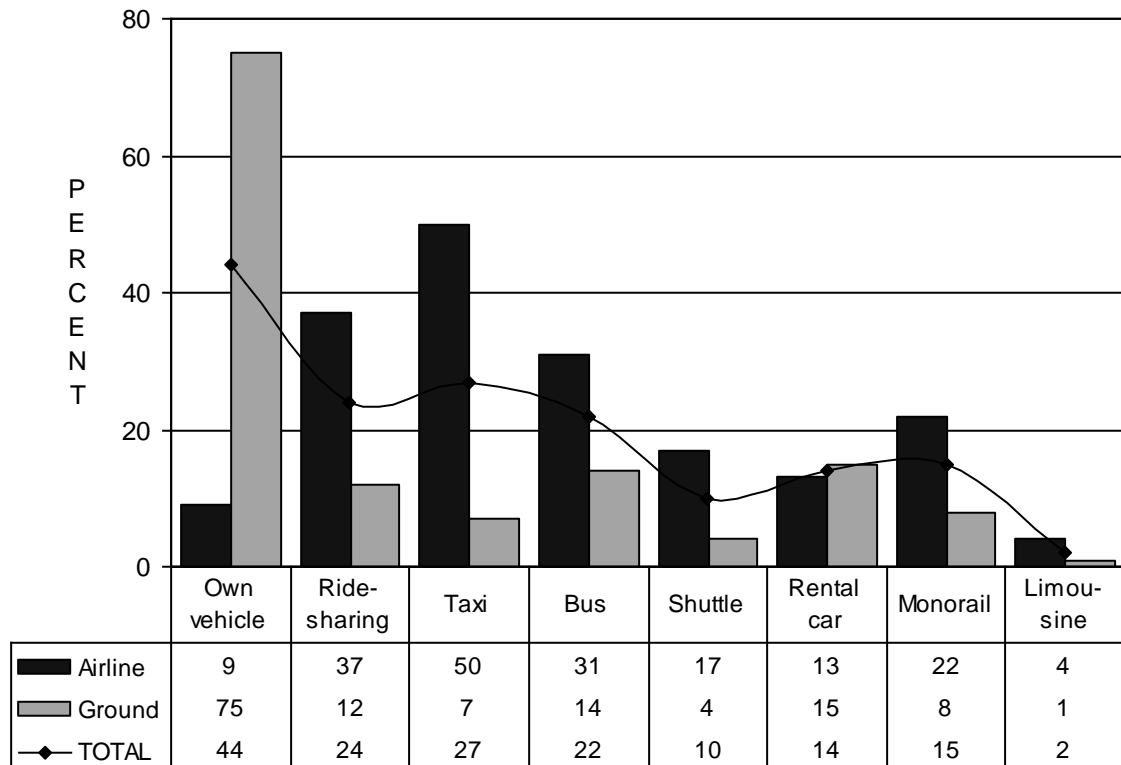
TRAVEL PLANNING

FIGURE 10
Advance Travel Planning



Airline visitors tended to plan their trip farther in advance than did visitors who arrived in Las Vegas by ground transportation. For example, 61% of airline visitors planned their trip more than two months in advance, compared to 30% of those who arrived by ground transportation.

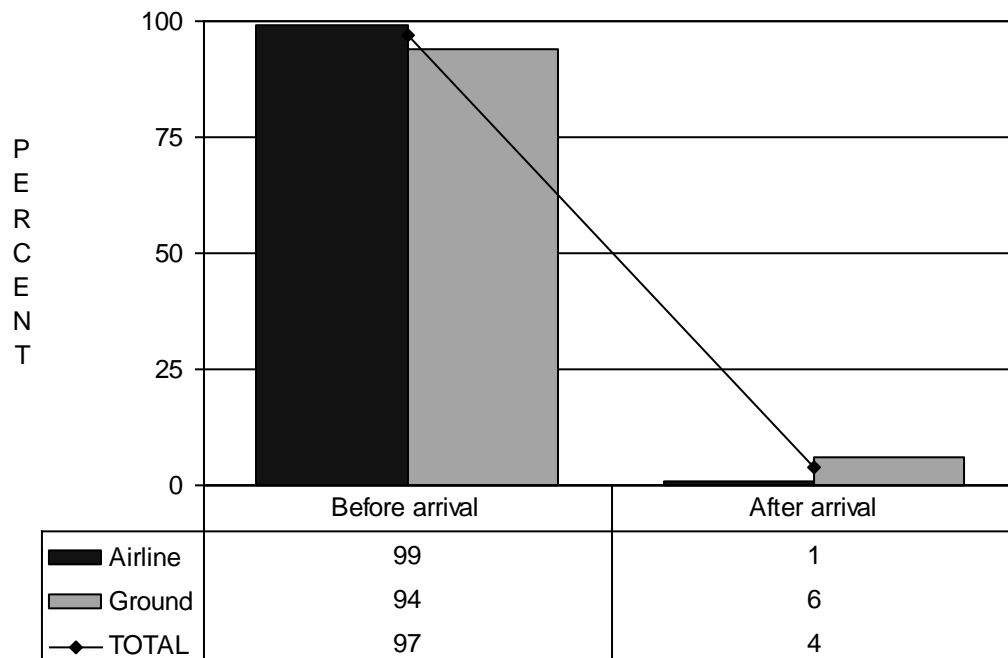
FIGURE 11
Local Transportation



Multiple responses permitted

As might be expected, airline visitors were much more likely than those who arrived in Las Vegas by ground transportation to use a variety of local transportation options to get around Las Vegas during their visit, including taxis (50% vs. 7%), a ride-sharing service (37% vs. 12%), hotel and motel shuttles (17% vs. 4%), buses (31% vs. 14%), the Monorail (22% vs. 8%), and limousines (4% vs. 1%). Also as expected, those visitors who arrived by ground transportation were much more likely than airline visitors to say they used their own vehicle (75% vs. 9%).

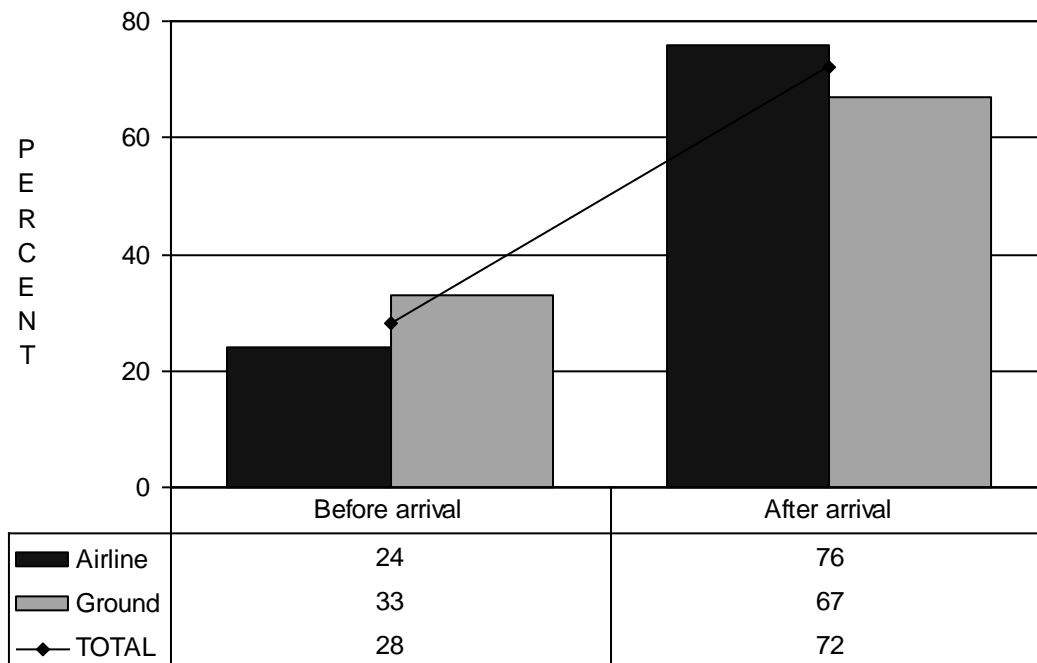
FIGURE 12
When Decided Where To Stay
(Among Those Who Stayed Overnight)



(Base Sizes: Air=1711, Ground=1873, TOTAL=3584)

The vast majority of visitors (97%) decided where to stay before arriving in Las Vegas. Airline visitors (99%) were more likely than those who arrived by ground transportation (94%) to have decided where to stay before arriving in Las Vegas.

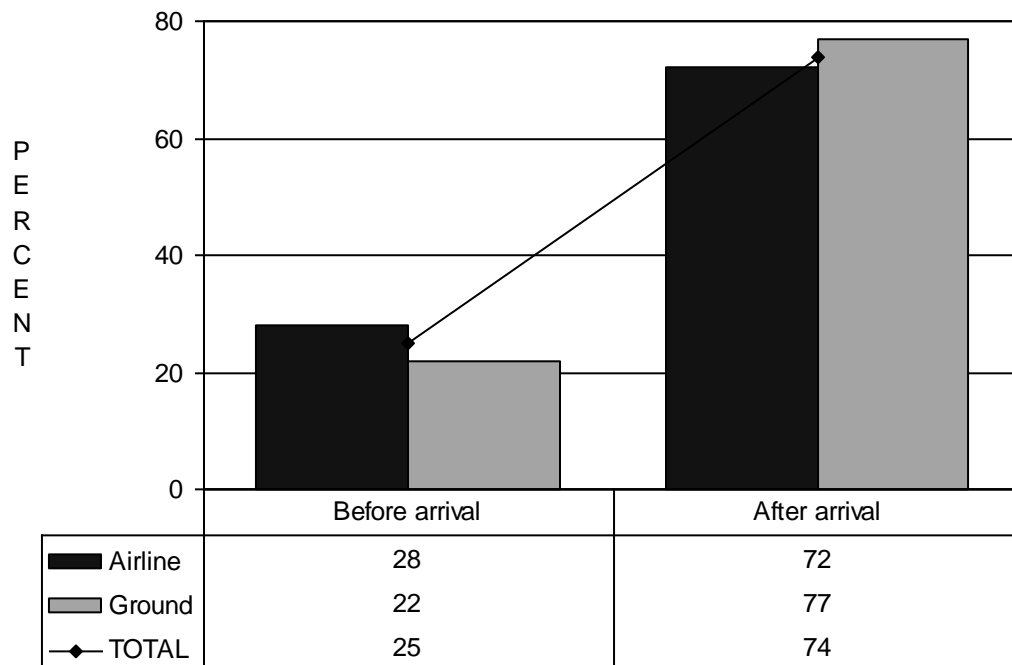
FIGURE 13
When Decided Where To Gamble
(Among Those Who Gambled)



(Base Sizes: Air=1386, Ground=1294, TOTAL=2679)

Nearly three-quarters (72%) of all visitors decided where to gamble after arriving in Las Vegas. Airline visitors (76%) were more likely than those who arrived by ground transportation (67%) to say they decided where to gamble after their arrival.

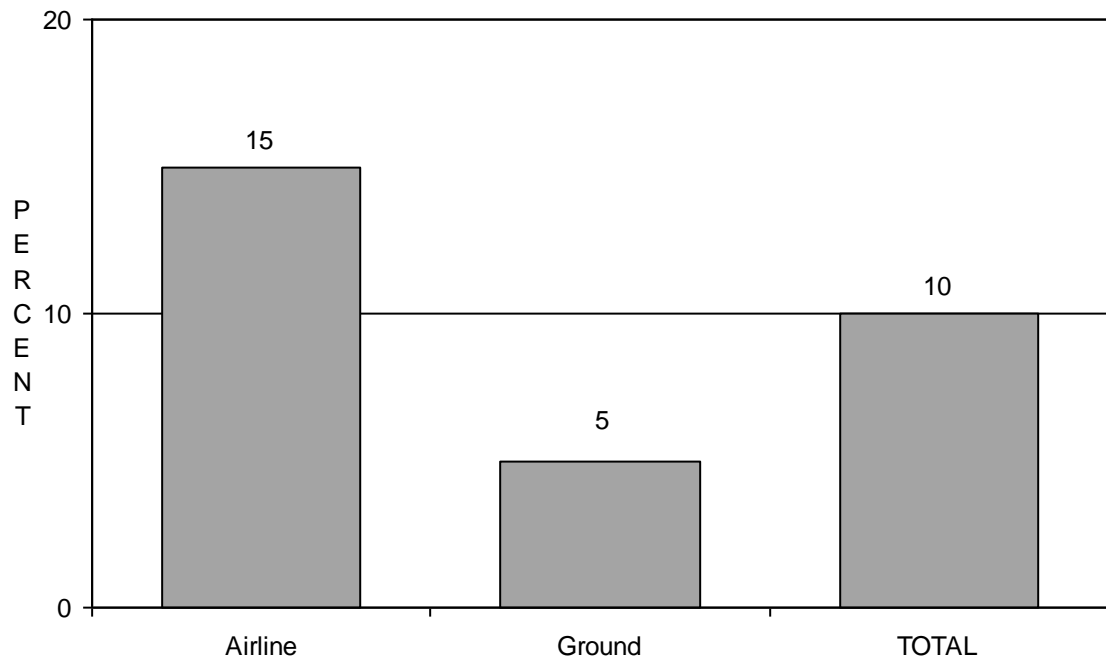
FIGURE 14
When Decided Which Shows To See
(Among Those Who Saw Shows)



(Base Sizes: Air=1199, Ground=896, TOTAL=2096)

Three-quarters (74%) of visitors decided which shows to see after arrival. Those visitors who arrived by ground transportation (77%) were more likely than airline visitors (72%) to say they decided which shows to see after arriving in Las Vegas.

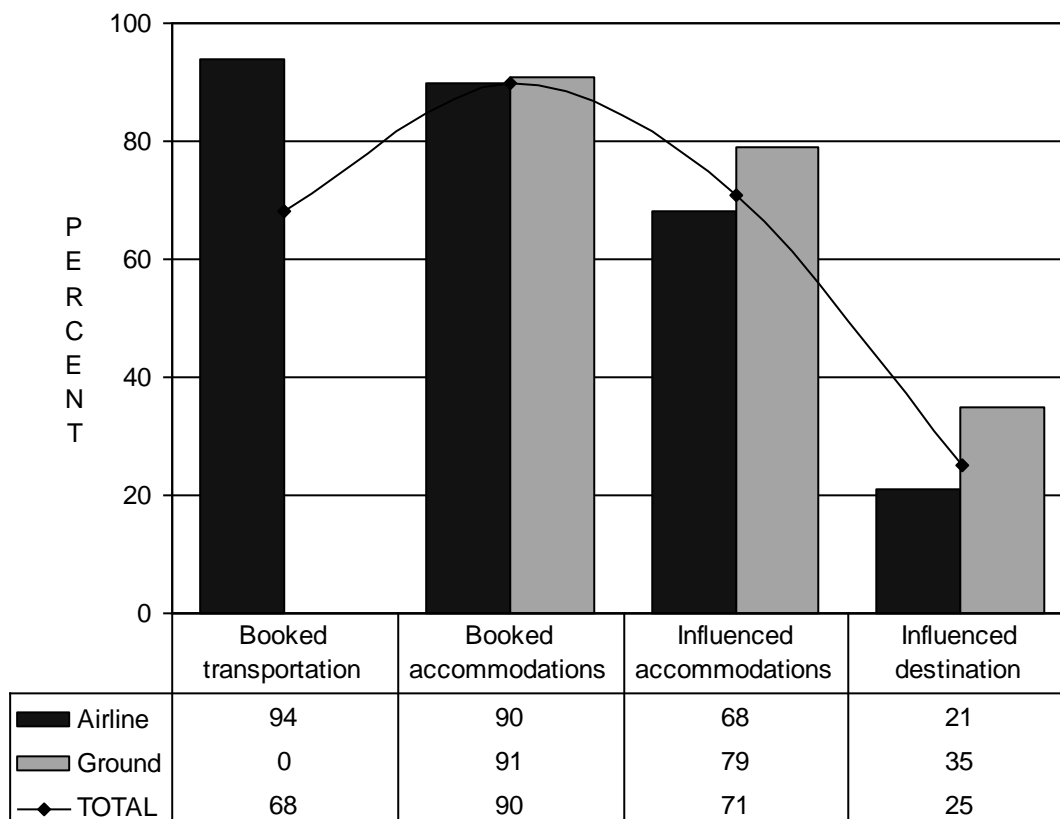
FIGURE 15
Travel Agent Assistance



Only "yes" responses are reported in this figure.

Ten percent (10%) of visitors to Las Vegas said they used a travel agent to help plan their trip. Airline visitors (15%) were more likely than those who traveled by ground transportation (5%) to have used the assistance of a travel agent to plan their trip to Las Vegas.

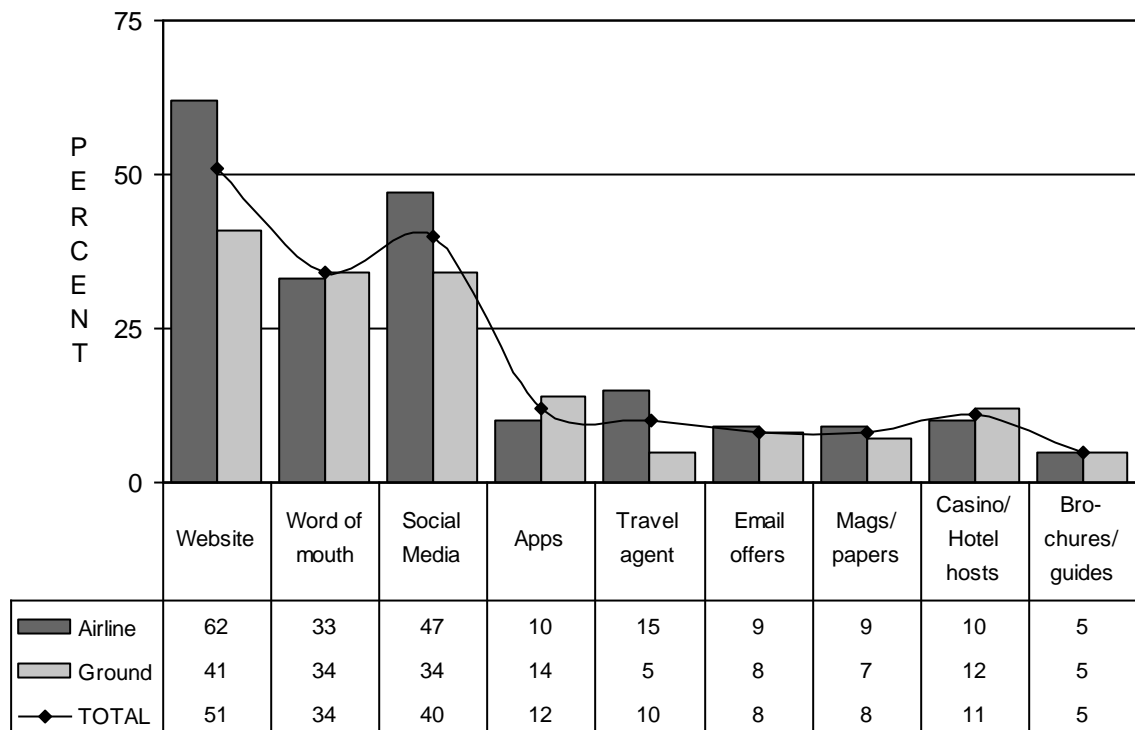
FIGURE 16
Travel Agent Influence And Use
(Among Those Who Used A Travel Agent)



Multiple responses permitted
(Base Sizes: Airline=263, Ground=101, TOTAL=364)

Among visitors who used a travel agent, 68% said the travel agent booked their transportation, 90% said the travel agent booked their accommodations, and 71% said the travel agent influenced their choice of accommodations. Airline visitors were more likely than those who arrived by ground transportation to say the agent booked their transportation to Las Vegas (94% vs. 0%).

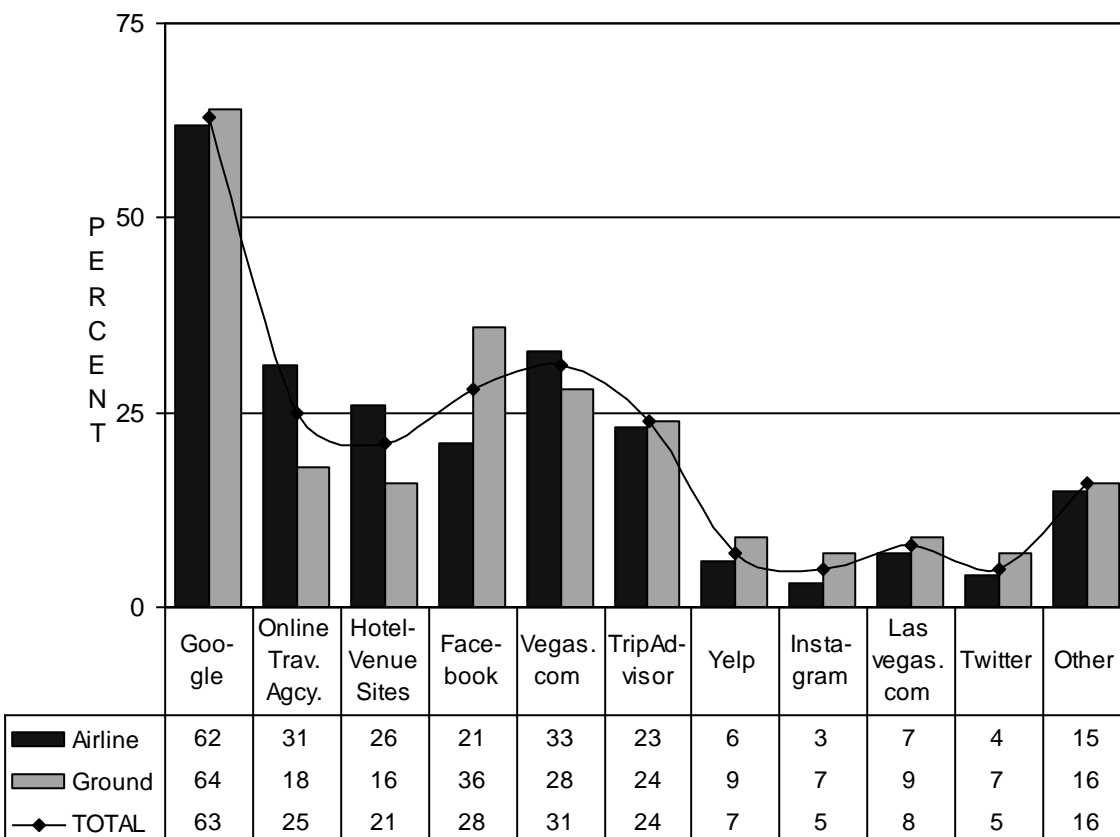
FIGURE 17
Tools Used In Planning Trip To Las Vegas



Multiple responses permitted

Visitors were asked what tools they used to plan their trip to Las Vegas. Over one-half (58%) of visitors said they used some type of online tool, either a website (51%), social media (40%), or an app (12%), while one-third (34%) said they relied on word of mouth. Airline visitors were more likely than those who arrived by ground transportation to say they had used a website (62% vs. 41%), social media (47% vs. 34%), a travel agent (15% vs. 5%), or magazines or newspapers (9% vs. 7%) in planning their trip. Those visitors who arrived by ground transportation were more likely than airline visitors to say they had used apps (14% vs. 10%).

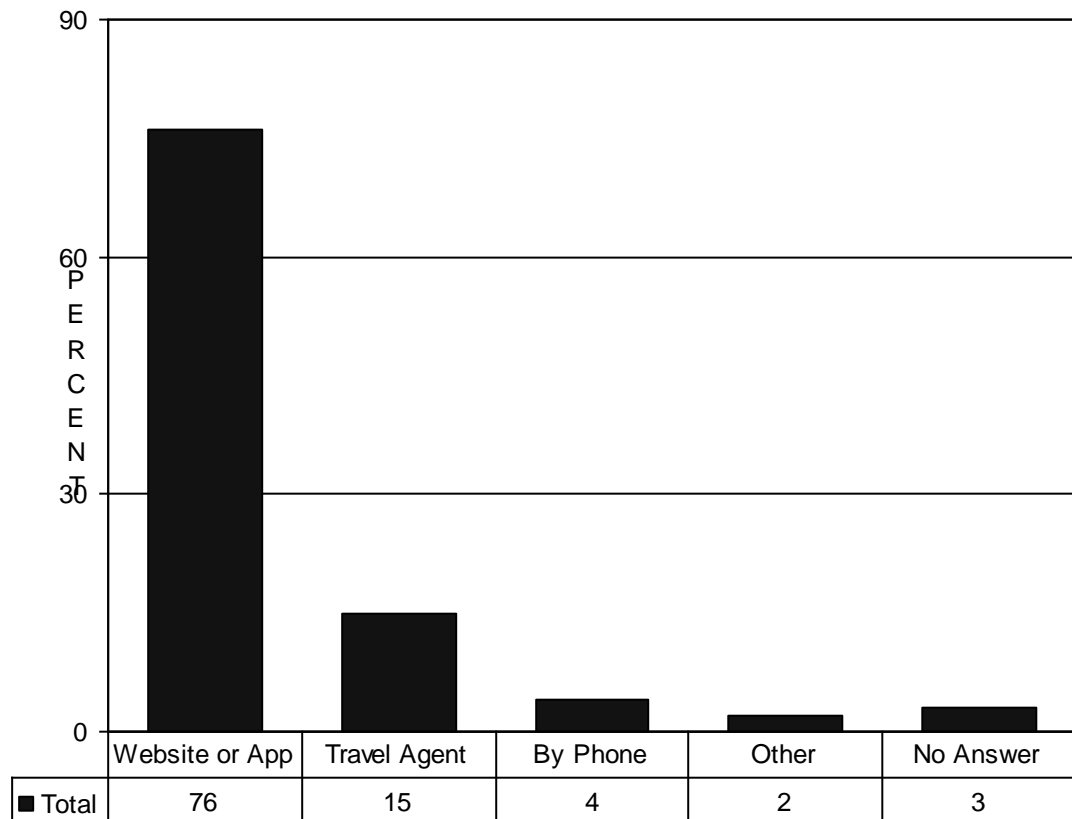
FIGURE 18
Social Media And Travel Review Apps Used In Planning Trip To Las Vegas



Multiple responses permitted
(Base Sizes: Airline=1153, Ground=944, TOTAL=2097)

Visitors who said they used a website, social media, or apps in planning their trip (58% of all visitors) were asked which social media or travel review apps they used. Nearly two-thirds (63%) said they used Google, while about three in ten (31%) used Vegas.com, and about one in four (25%) said they consulted reviews at online travel agencies or used Facebook (28%). Airline visitors were more likely to have consulted reviews at online travel agencies (31% vs. 18%) or hotel or show venue sites (26% vs. 16%), or to have used Vegas.com (33% vs. 28%), while those who arrived by ground transportation were more likely to say that they used Facebook (36% vs. 21%), Yelp (9% vs. 6%) or Instagram (7% vs. 3%).

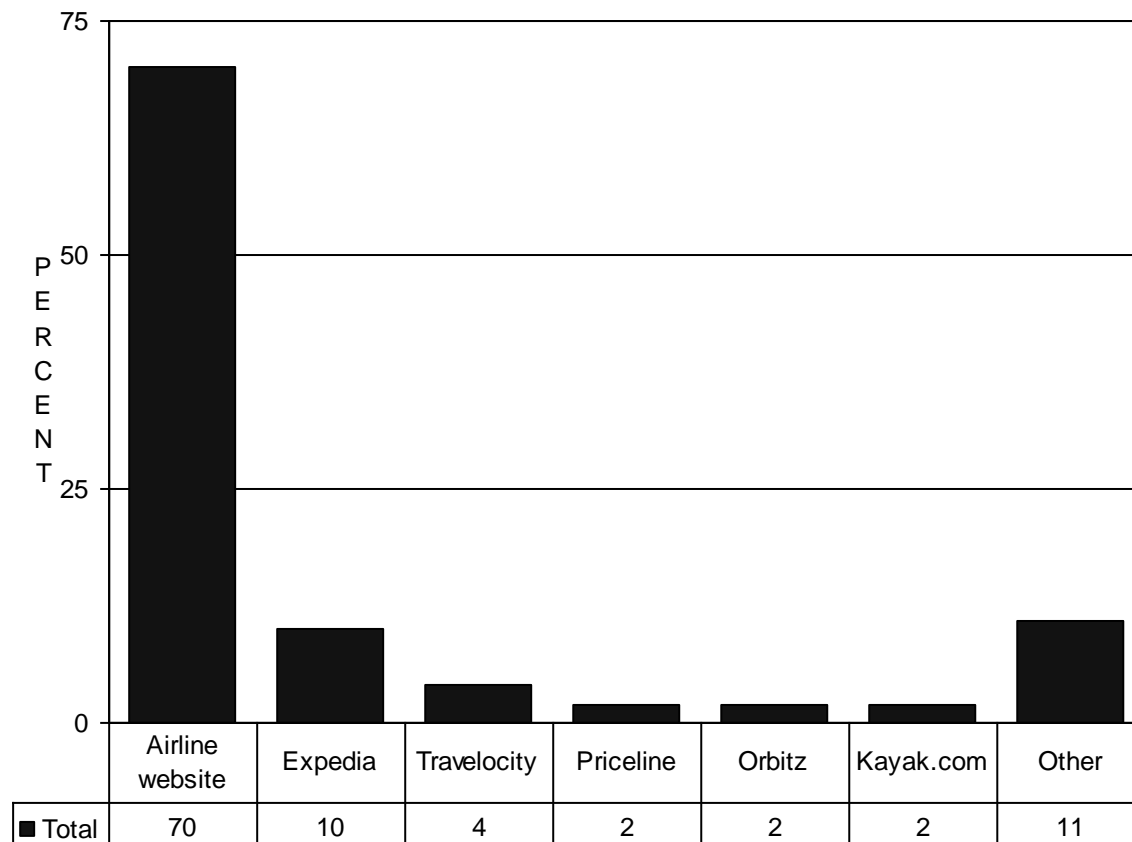
FIGURE 19
How Booked Flight To Las Vegas



(Base Sizes: Airline=1714, TOTAL=1714)

Airline visitors were asked how they booked their flight to Las Vegas. In 2018 over three-quarters (76%) said they booked their flight using a website or an app. About one in seven (15%) said they used a travel agent, and 4% said that they booked their flight by phone.

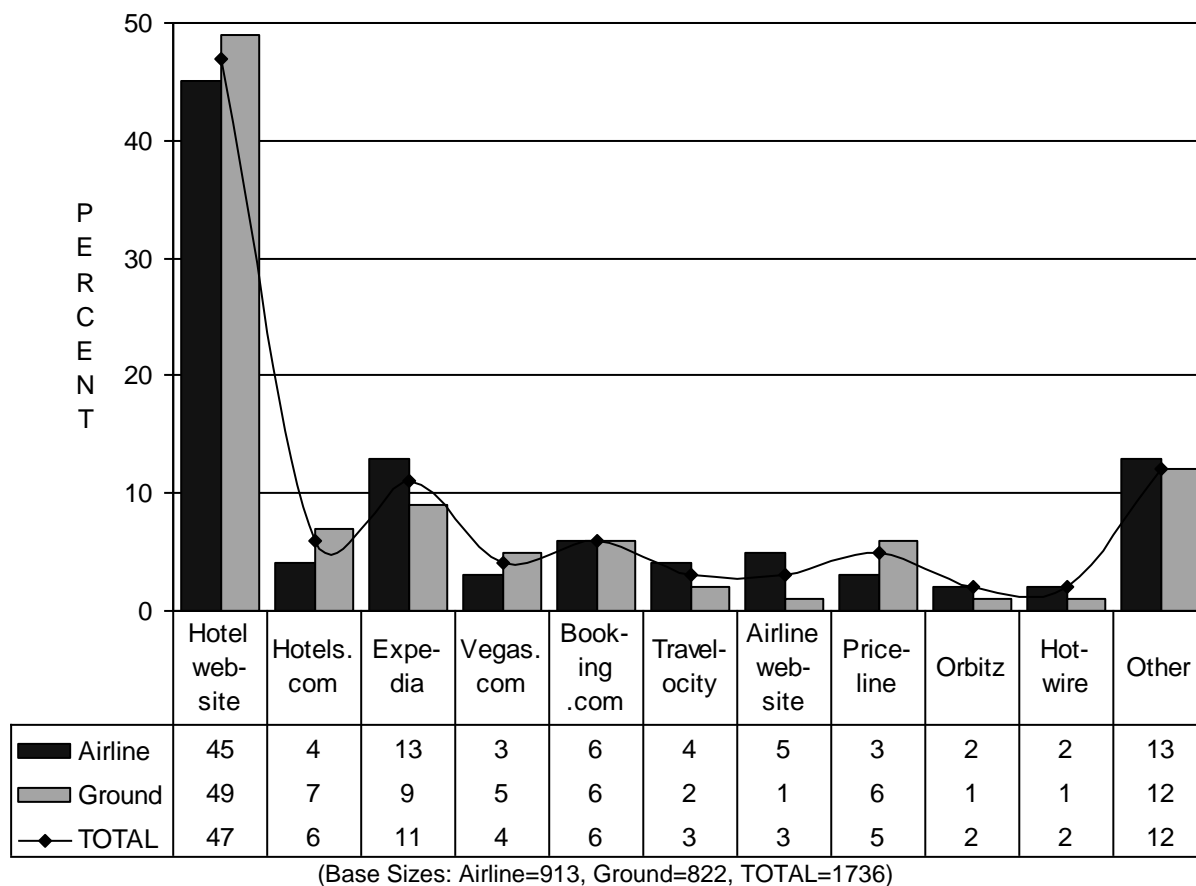
FIGURE 20
Website Used To Book Flight
(Among Those Who Booked Their
Flight To Las Vegas Online)



(Base Sizes: Airline=1309, TOTAL=1309)

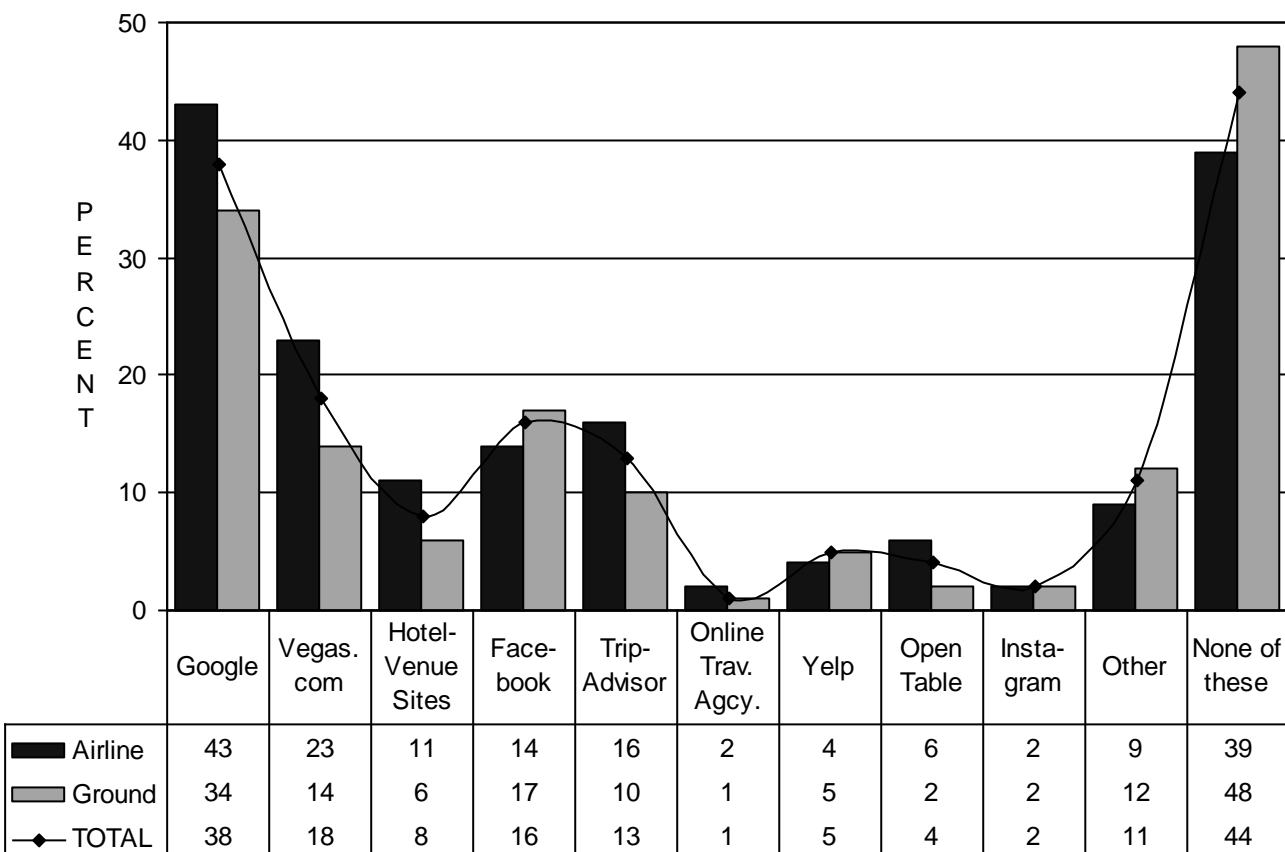
Among those airline visitors who said they used a website or app to book their flight to Las Vegas, seven in ten (70%) used an airline website. Ten percent (10%) used Expedia, while 4% used Travelocity.

FIGURE 21
Website Used To Book Accommodations
 (Among Those Who Booked Their
 Accommodations In Las Vegas Online)



Visitors who booked their accommodations online were most likely to say they had used a hotel website (47%), followed by Expedia.com (11%). Those visitors who arrived by ground transportation were more likely than airline visitors to say they used Hotels.com (7% vs. 4%), Priceline (6% vs. 3%), or Vegas.com (5% vs. 3%). Not surprisingly, airline visitors were more likely than those who arrived by ground transportation to say they used an airline website (5% vs. 1%). Airline visitors (13%) were also more likely to have used Expedia than those who arrived by ground transportation (9%).

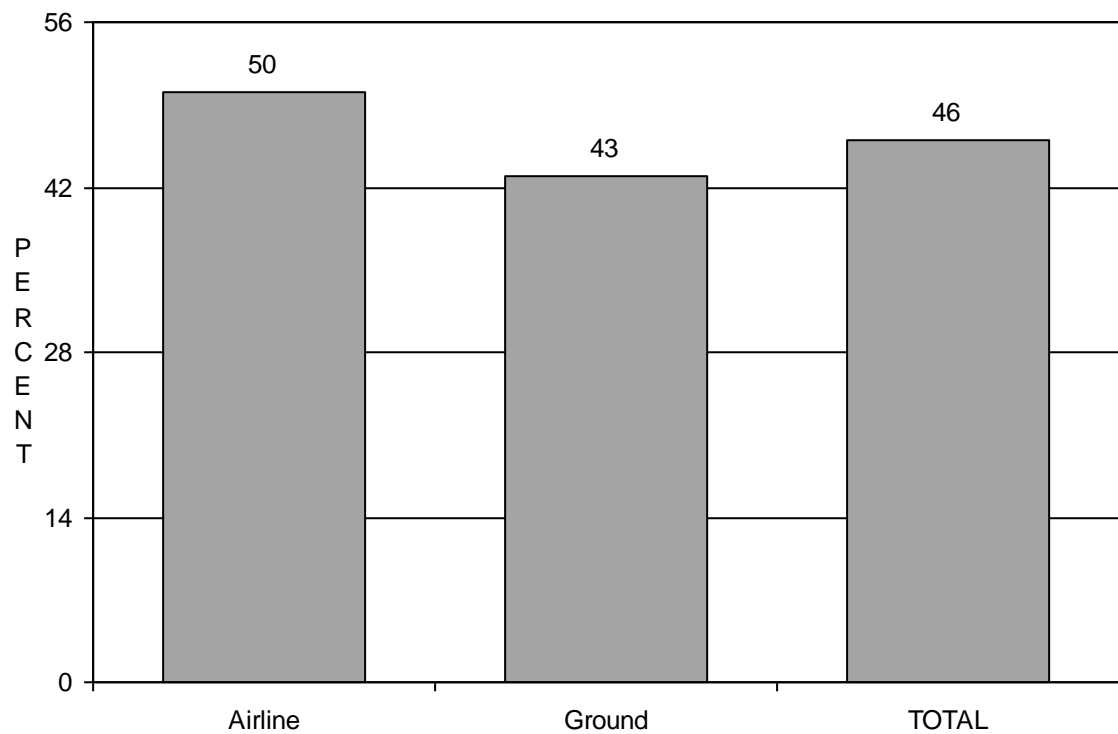
FIGURE 22
Social Media And Travel Review Apps Used During Current Trip To Las Vegas



Multiple responses permitted

Visitors were asked which, if any, social media and travel review apps they used during their trip to Las Vegas. Over one-third (38%) mentioned Google. Over four in ten visitors (44%) said that they did not use social media apps or sites to plan their activities. Airline visitors were more likely than those who arrived by ground to use a variety of sites to plan their activities, including Google (43% vs. 34%), Vegas.com (23% vs. 14%), TripAdvisor (16% vs. 10%), hotel or show venue sites (11% vs. 6%) and OpenTable (6% vs. 2%). Those visitors who arrived by ground transportation were more likely than airline visitors to say that they used Facebook (17% vs. 14%). Those visitors who arrived by ground transportation were also more likely than airline visitors to say that they did not use any social media apps or websites to plan their activities (48% vs. 39%).

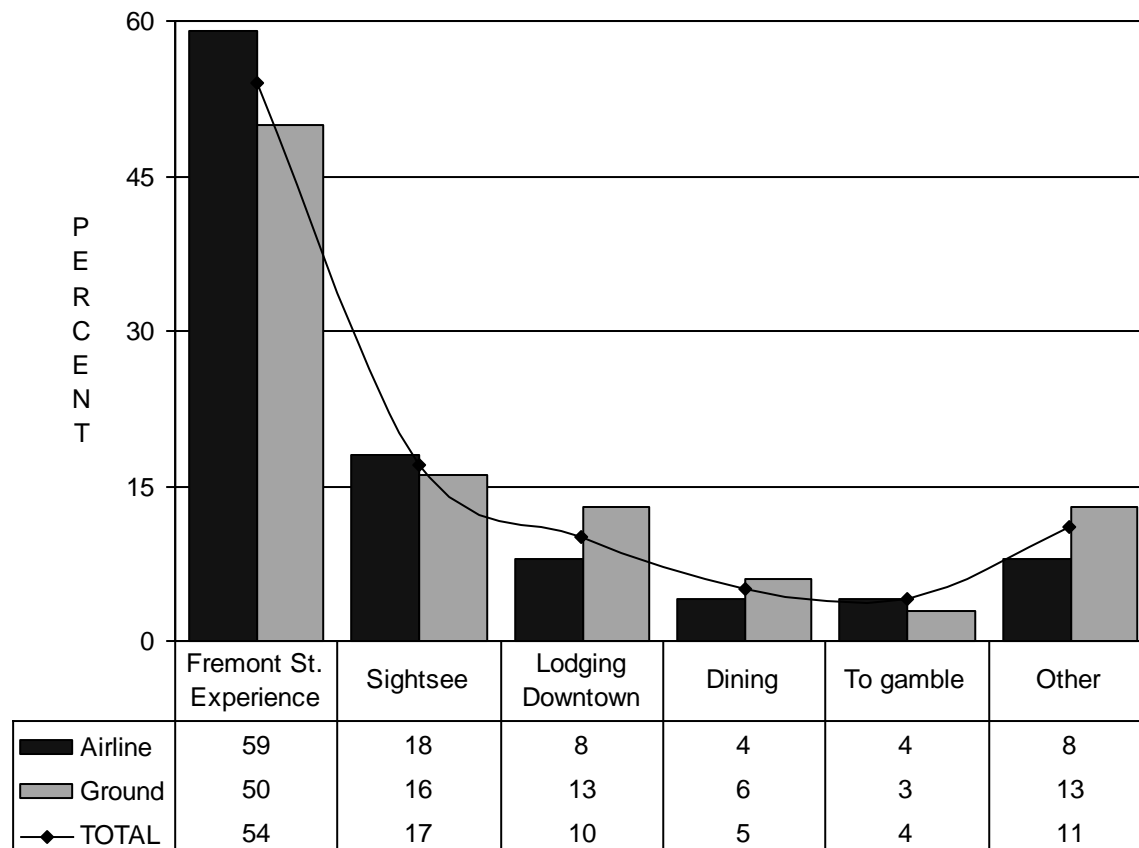
FIGURE 23
Whether Visited Downtown Las Vegas



Only "yes" responses are reported in this figure.

Forty-six percent (46%) of all visitors said they visited Downtown Las Vegas. Airline visitors (50%) were more likely than those visitors who arrived by ground transportation (43%) to have visited Downtown during their trip.

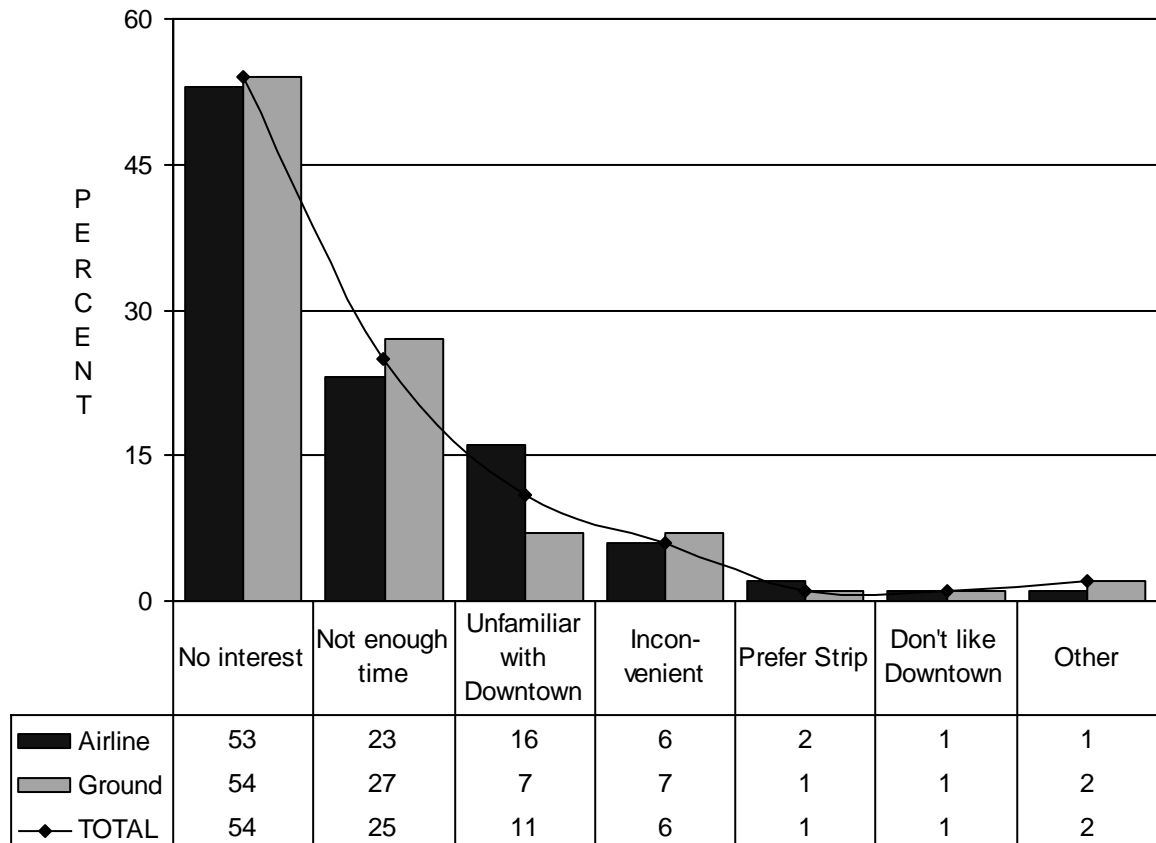
FIGURE 24
Main Reason For Visiting Downtown Las Vegas
(Among Those Who Visited Downtown)



(Base Sizes: Airline=856, Ground=804, TOTAL=1661)

Respondents who had visited Downtown Las Vegas were asked the primary reason why they had done so. Over one-half (54%) of all visitors said the Fremont Street Experience was their main reason for visiting Downtown. Those visitors who arrived by ground transportation were more likely than airline visitors to say they were visiting Downtown because they were lodging Downtown (13% vs. 8%), while airline visitors were more likely than those who arrived by other means to say they were visiting Downtown for the Fremont Street Experience (59% vs. 50%).

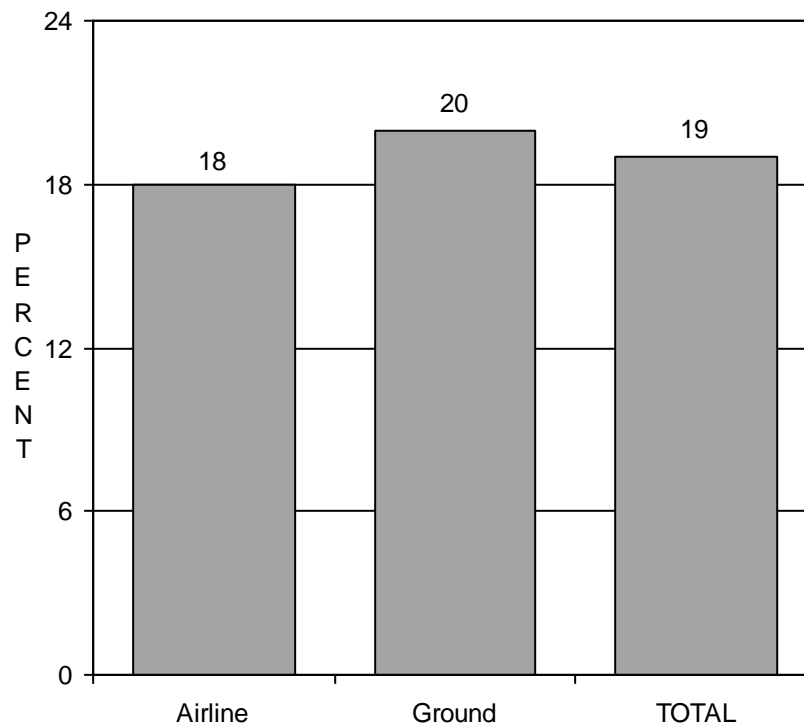
FIGURE 25
Main Reason For Not Visiting Downtown Las Vegas
(Among Those Who Did Not Visit Downtown)



(Base Sizes: Air=856, Ground=1081, TOTAL=1937)

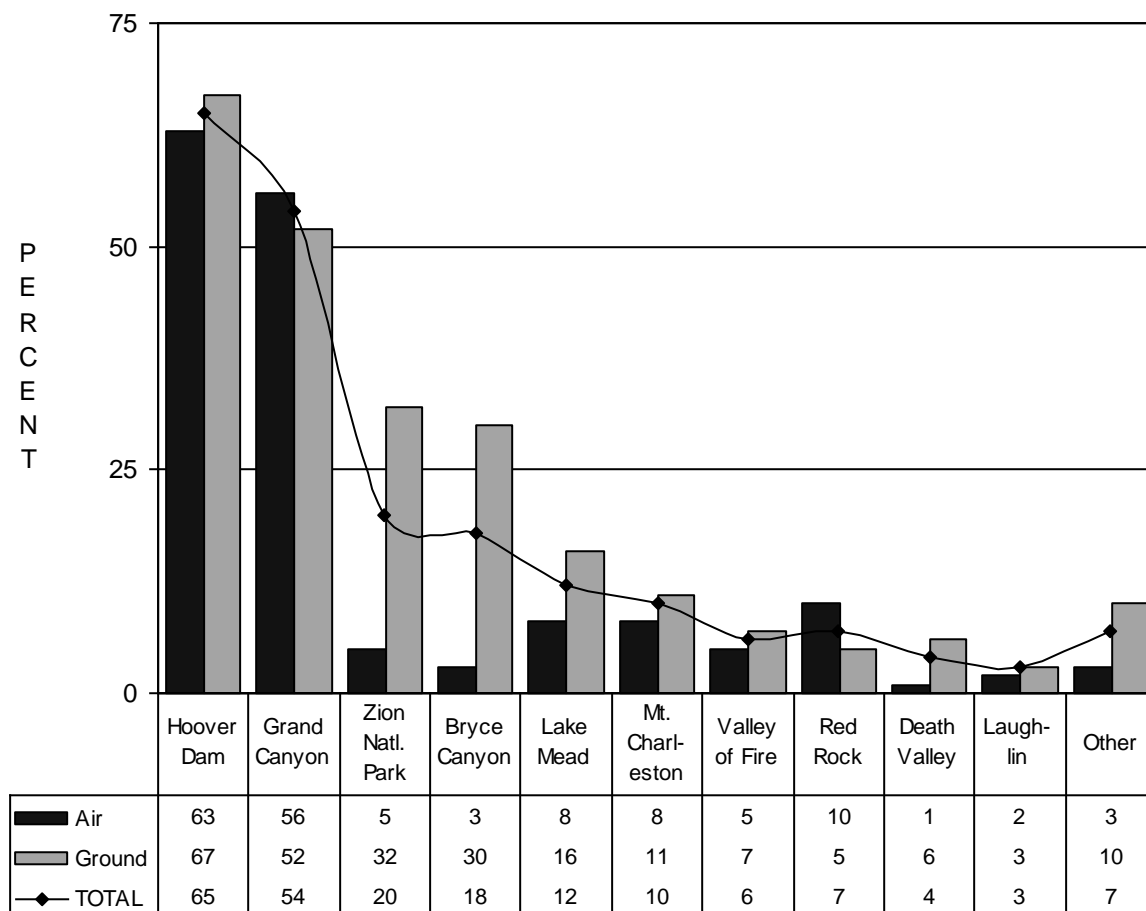
Visitors who did not visit Downtown were asked to volunteer why. Over one-half of them said that they had no interest or reason to go downtown (54%), while one-quarter said there was not enough time (25%). Airline visitors were more likely than those who arrived by ground transportation to say they were unfamiliar with Downtown (16% vs. 7%).

FIGURE 26
Visits To Nearby Places



Visitors were asked if they visited any nearby places before or after their trip to Las Vegas and about one in five (19%) said they had. There were no differences between airline visitors and those who arrived by ground transportation on this measure.

FIGURE 27
Other Nearby Places Visited
 (Among Those Who Visited Or Planned To Visit Other Places)

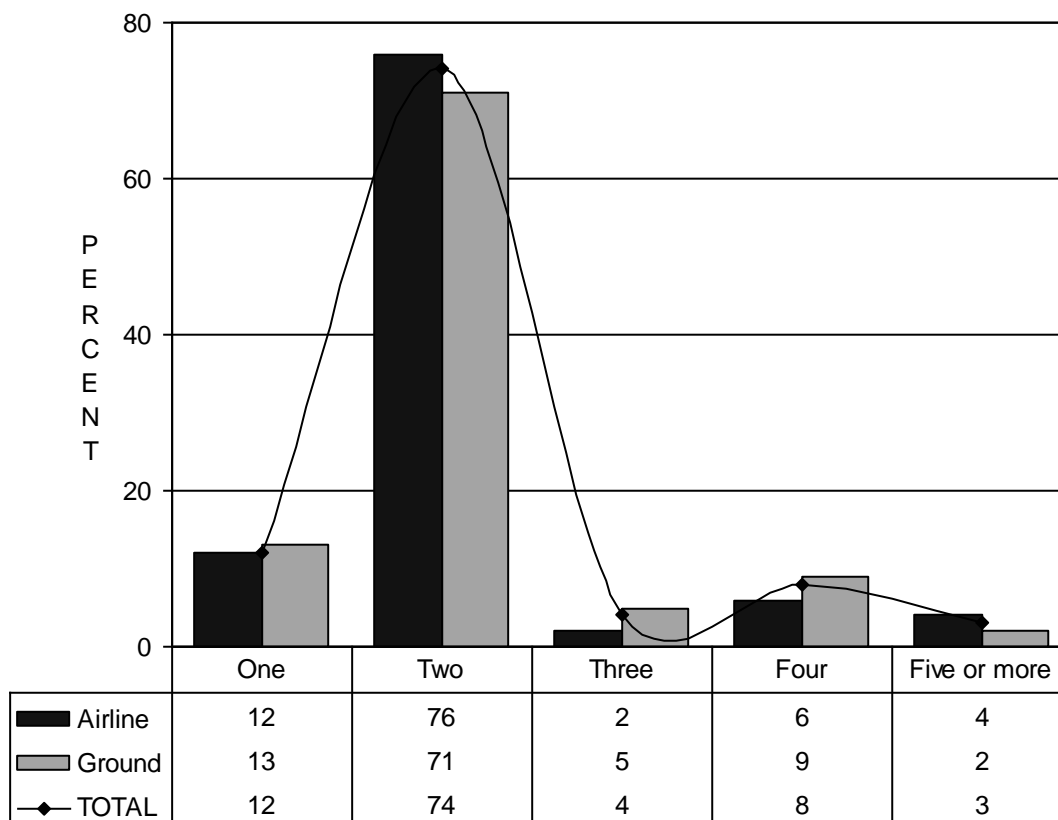


(Base Sizes: Air=315, Ground=378, TOTAL=694)

Visitors were asked what other nearby destinations they had visited, or planned to visit. Overall, Hoover Dam (65%) and the Grand Canyon (54%) were the most visited destinations. Those visitors who arrived by ground transportation were more likely than airline visitors to have visited Zion National Park (32% vs. 5%), Bryce Canyon (30% vs. 3%), Lake Mead (16% vs. 8%), and Death Valley (6% vs. 1%). Airline visitors were more likely than those who arrived by ground transportation to have visited Red Rock (10% vs. 5%).

TRIP CHARACTERISTICS AND EXPENDITURES

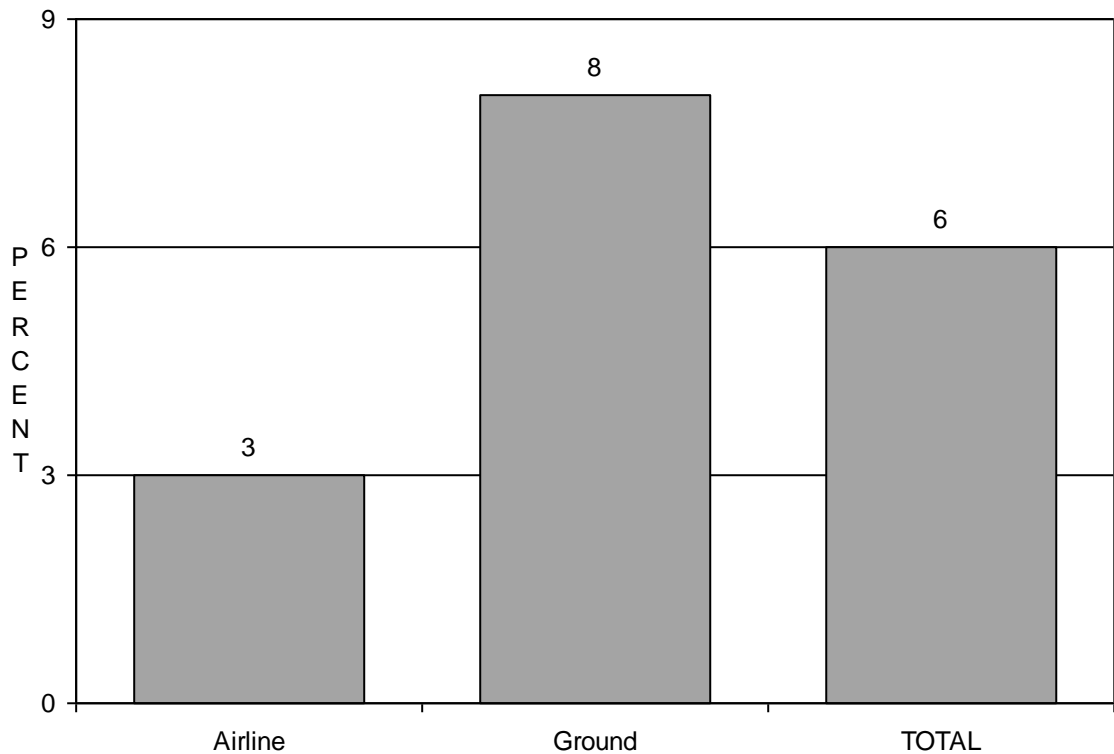
FIGURE 28
Adults In Immediate Party



(Means: Airline=2.2, Ground=2.2, TOTAL=2.2)

The majority of all visitors (74%) traveled in parties of two. The average party size was 2.2 people. Those visitors who arrived by ground transportation were more likely than airline visitors to say there were three or four (14% vs. 8%) adults in their party. Airline visitors were more likely than those who arrived by ground transportation to say that there were two (76% vs. 71%) or five or more (4% vs. 2%) adults in their party.

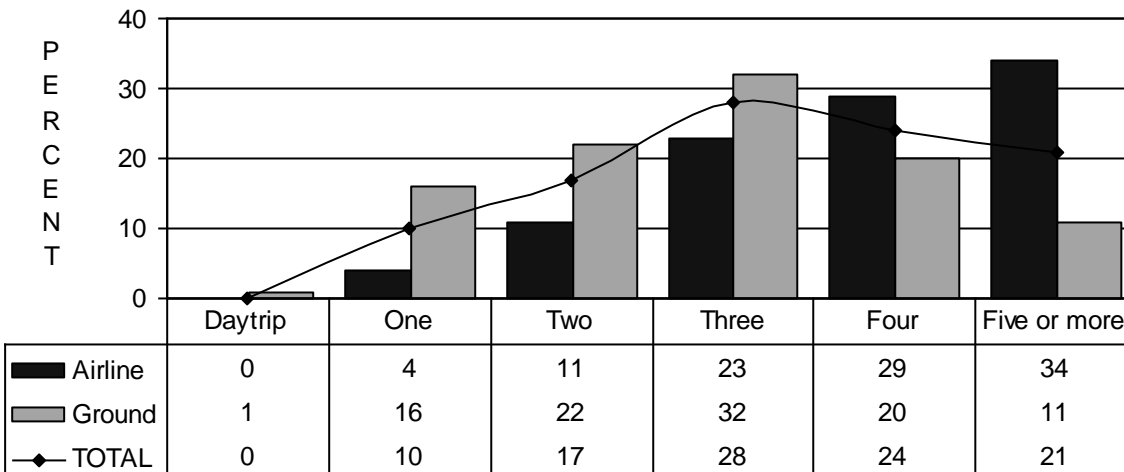
FIGURE 29
Whether Has Persons In Immediate Party Under Age 21
(Among All Visitors)



Only "yes" responses are reported in this figure.

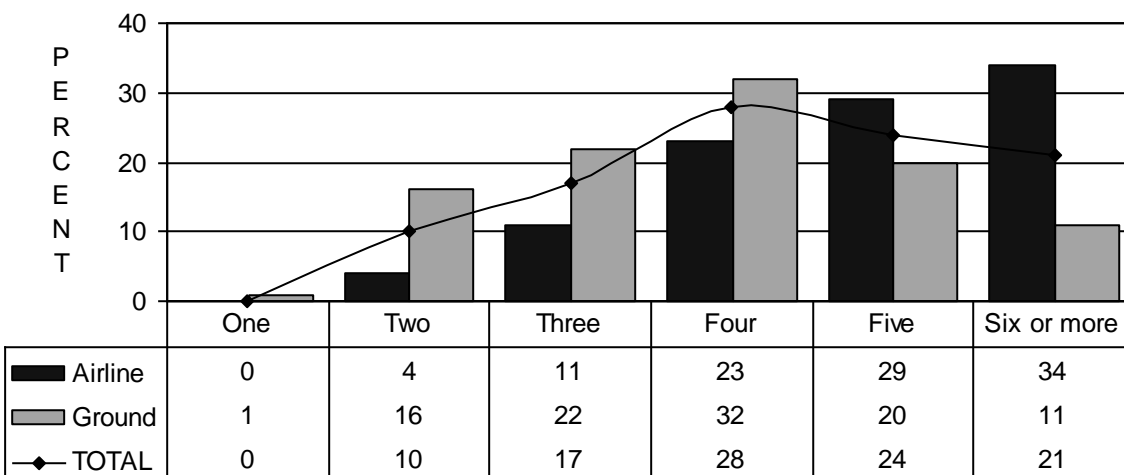
Six percent (6%) of visitors said they were traveling with people under the age of 21 in their party. Airline visitors (3%) were less likely than visitors who arrived by ground transportation (8%) to say there were people under the age of 21 in their party.

FIGURE 30
Nights Stayed



(Means: Airline=4.0, Ground=2.9, TOTAL=3.4)

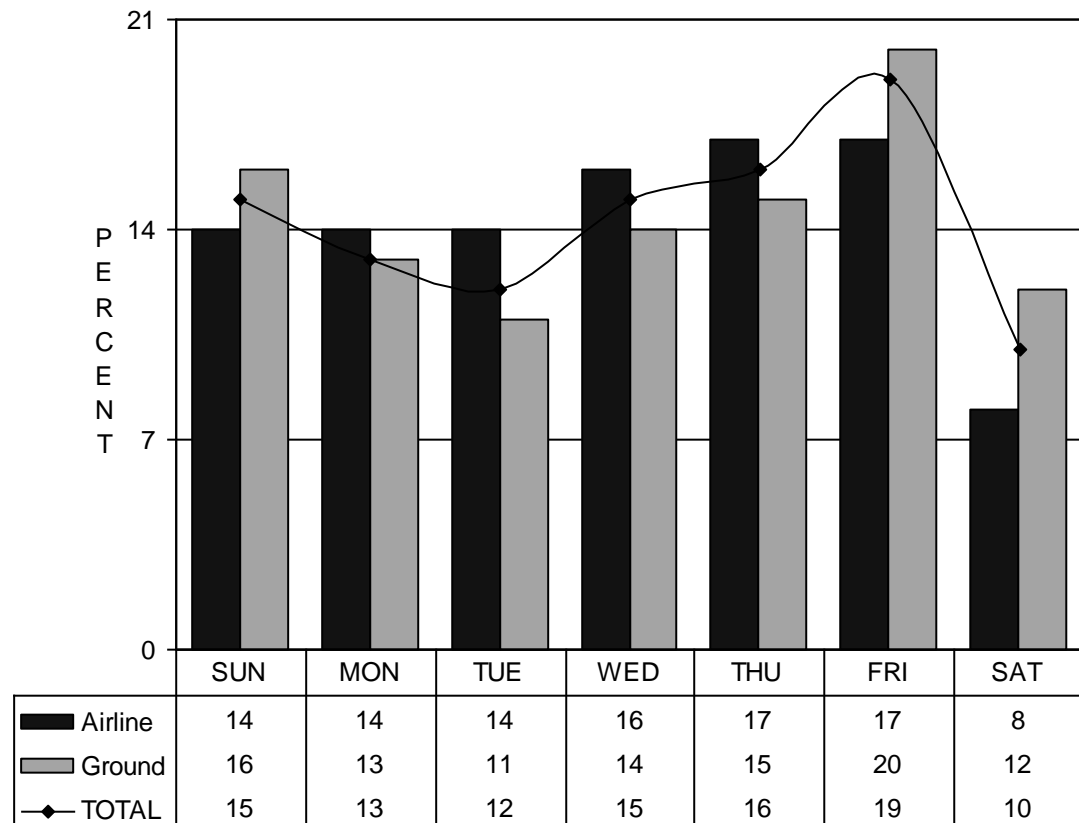
FIGURE 31
Days Stayed



(Means: Airline=5.0, Ground=3.9, TOTAL=4.4)

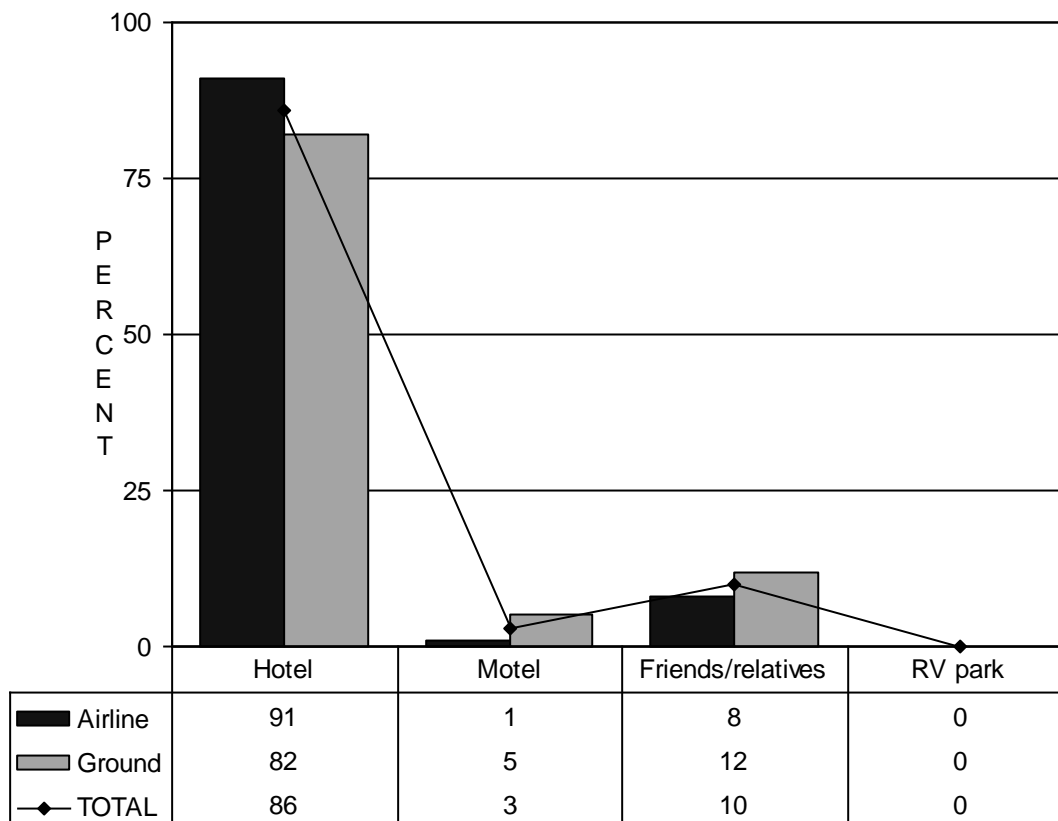
Airline visitors stayed longer in Las Vegas, an average of 4.0 nights and 5.0 days, compared to those who arrived by ground transportation (2.9 nights and 3.9 days).

FIGURE 32
Day Of Arrival



All respondents were asked on what day of the week they arrived in Las Vegas. Visitors were most likely to arrive on a Friday (19%). Those visitors who arrived by ground transportation were more likely than airline visitors to arrive on a weekend (32% vs. 25%), while airline visitors were more likely to arrive on a Tuesday (14% vs. 11%).

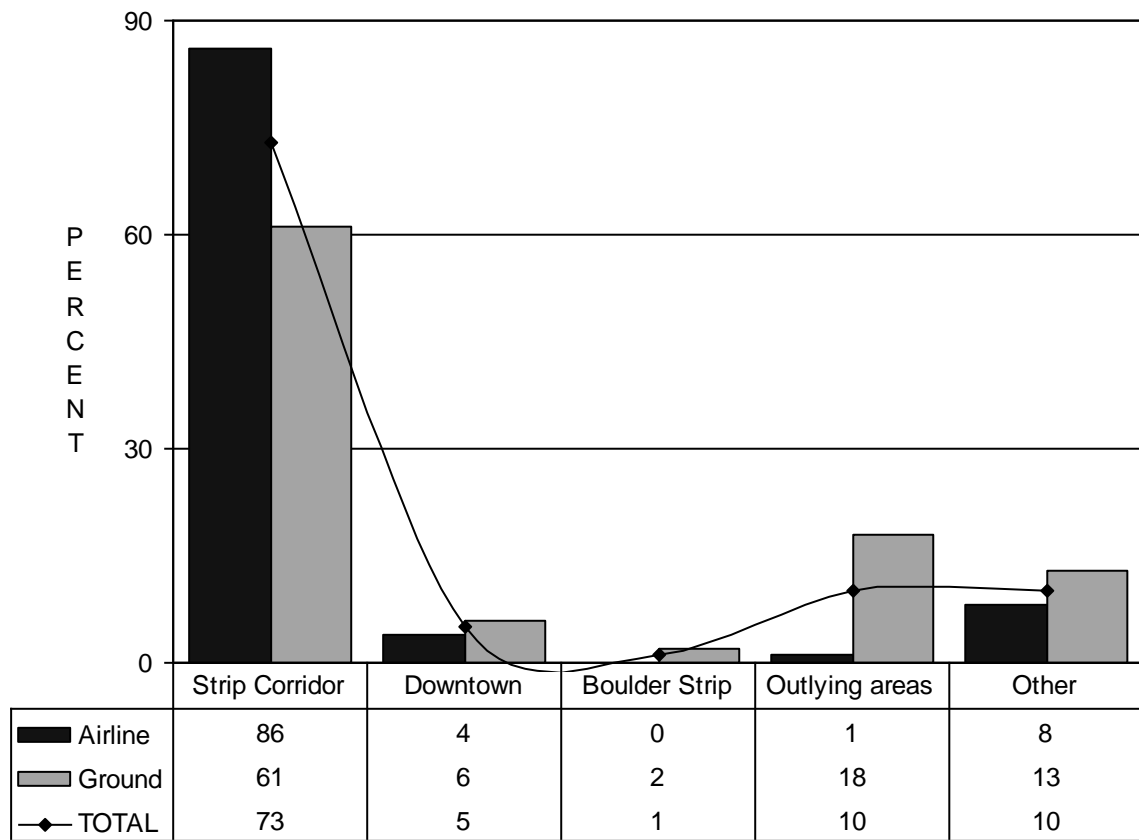
FIGURE 33
Type Of Lodging
(Among Those Who Stayed Overnight)



(Base Sizes: Airline=1711, Ground=1873, TOTAL=3584)

Airline visitors (91%) were more likely than those who arrived by ground transportation (82%) to have stayed in a hotel and less likely than those who arrived by ground transportation to have stayed in a motel (1% vs. 5%) or with friends or relatives (8% vs. 12%).

FIGURE 34
Location Of Lodging
(Among Those Who Stayed Overnight)

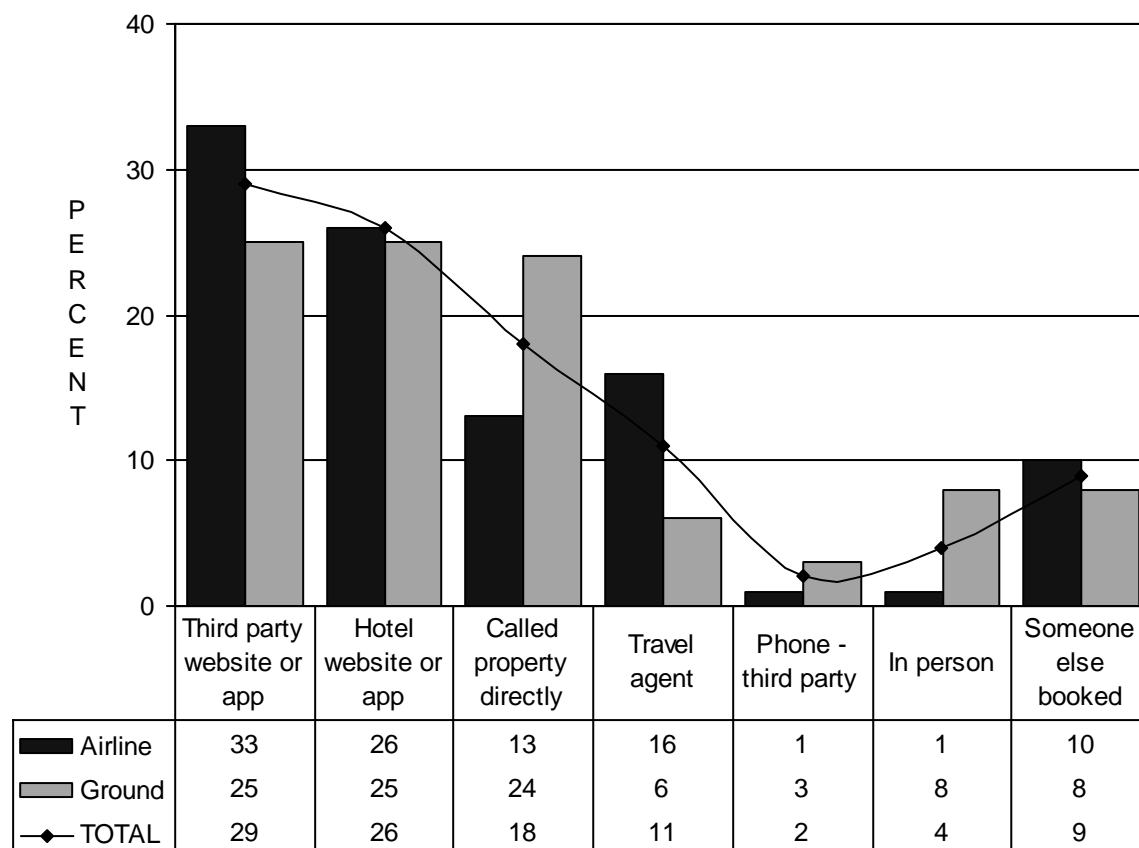


(Base Sizes: Airline=1711, Ground=1873, TOTAL=3584)

In terms of lodging location, airline visitors (86%) were more likely than those who arrived by ground transportation (61%) to stay at a property on the Strip Corridor*. Those visitors who arrived by ground transportation were more likely than airline visitors to say they stayed on the Boulder Strip (2% vs. less than 1%) or in outlying areas (18% vs. 1%).

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

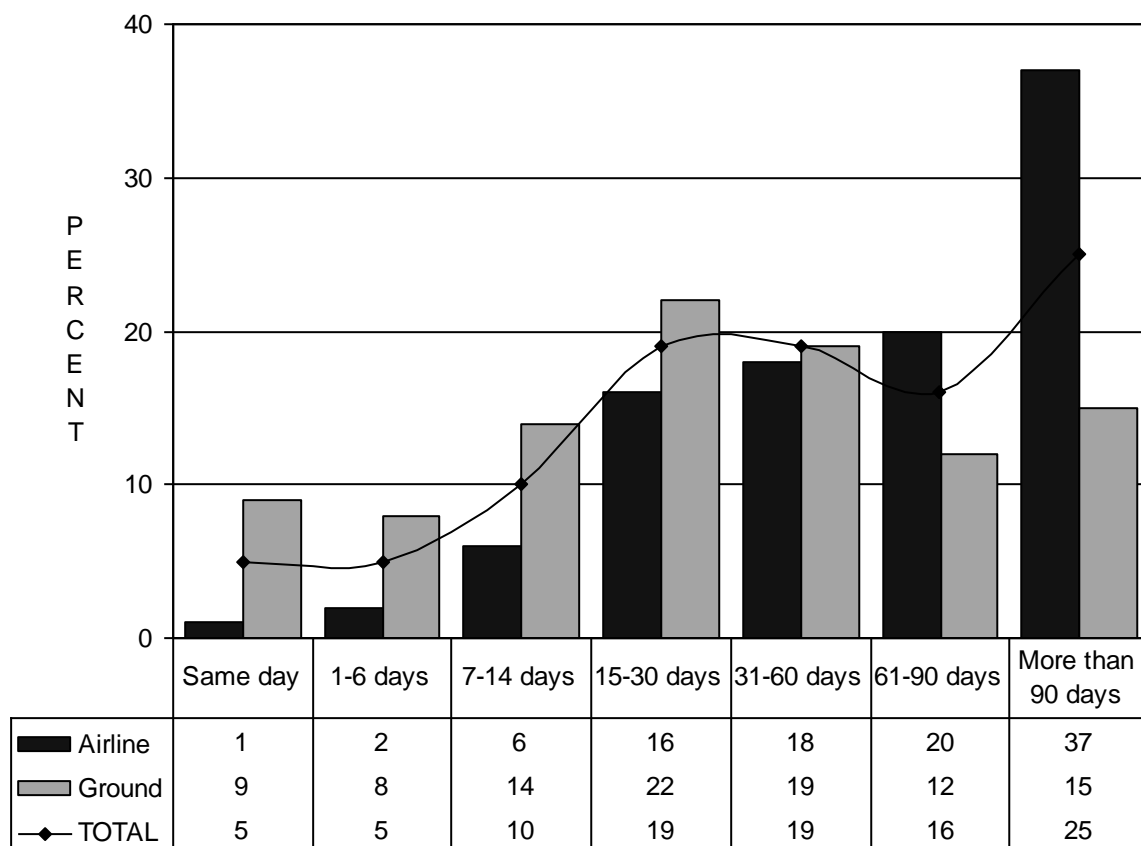
FIGURE 35
How Booked Accommodations In Las Vegas
(Among Those Who Stayed In A Hotel/Motel/RV Park)



(Base Sizes: Airline=1545, Ground=1626, TOTAL=3171)

Visitors who stayed at a hotel, motel or in an RV park were asked how they, or someone in their party, booked their accommodations in Las Vegas for their most recent trip. Airline visitors were more likely than those who arrived by ground transportation to say they had booked their accommodations through a third party website (33% vs. 25%) or through a travel agent (16% vs. 6%). Those visitors who arrived by ground transportation were more likely than airline visitors to say they booked their accommodations by calling the property directly (24% vs. 13%), by phone through a third party (3% vs. 1%), or in person (8% vs. 1%).

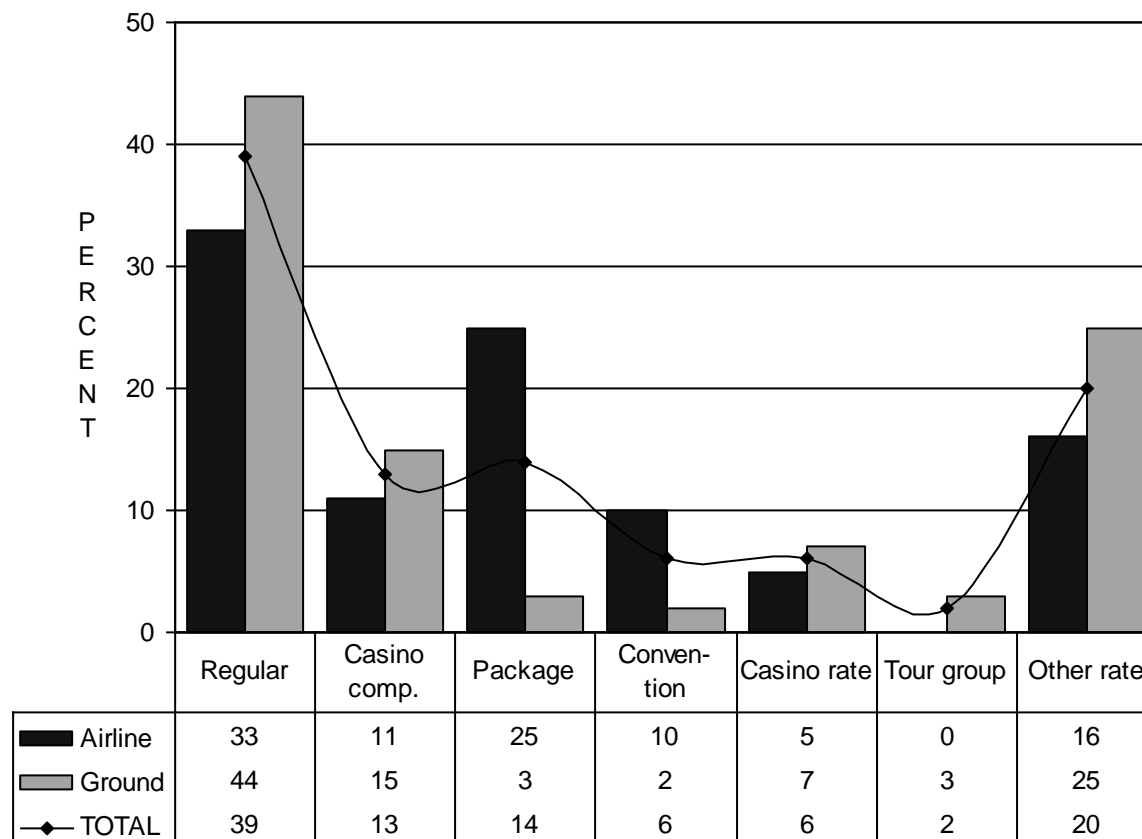
FIGURE 36
Advance Booking Of Accommodations
 (Among Those Who Stayed In A Hotel/Motel/RV Park)



(Base Sizes: Airline=1545, Ground=1626, TOTAL=3171)

Airline visitors booked their accommodations further in advance than those who arrived by ground transportation. For example, 37% of airline visitors booked their accommodations more than 90 days in advance compared to 15% of those who arrived by ground transportation. Visitors who arrived by ground transportation were more likely than airline visitors to have booked their accommodations a month or less before their arrival (53% vs. 25%).

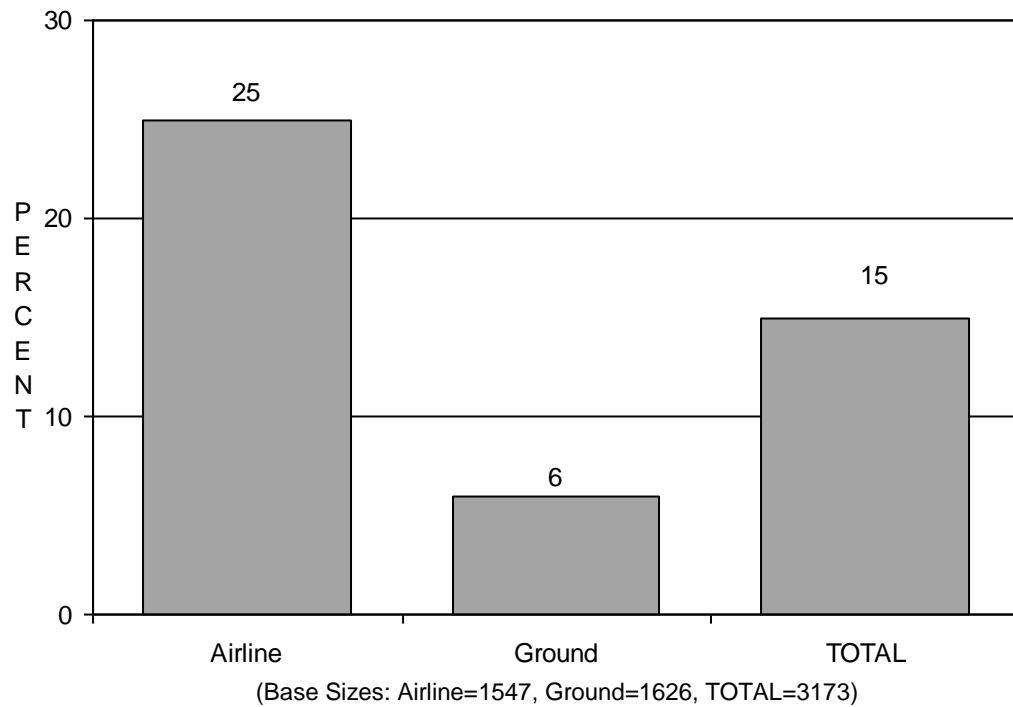
FIGURE 37
Type Of Room Rates
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Airline=1547, Ground=1626, TOTAL=3173)

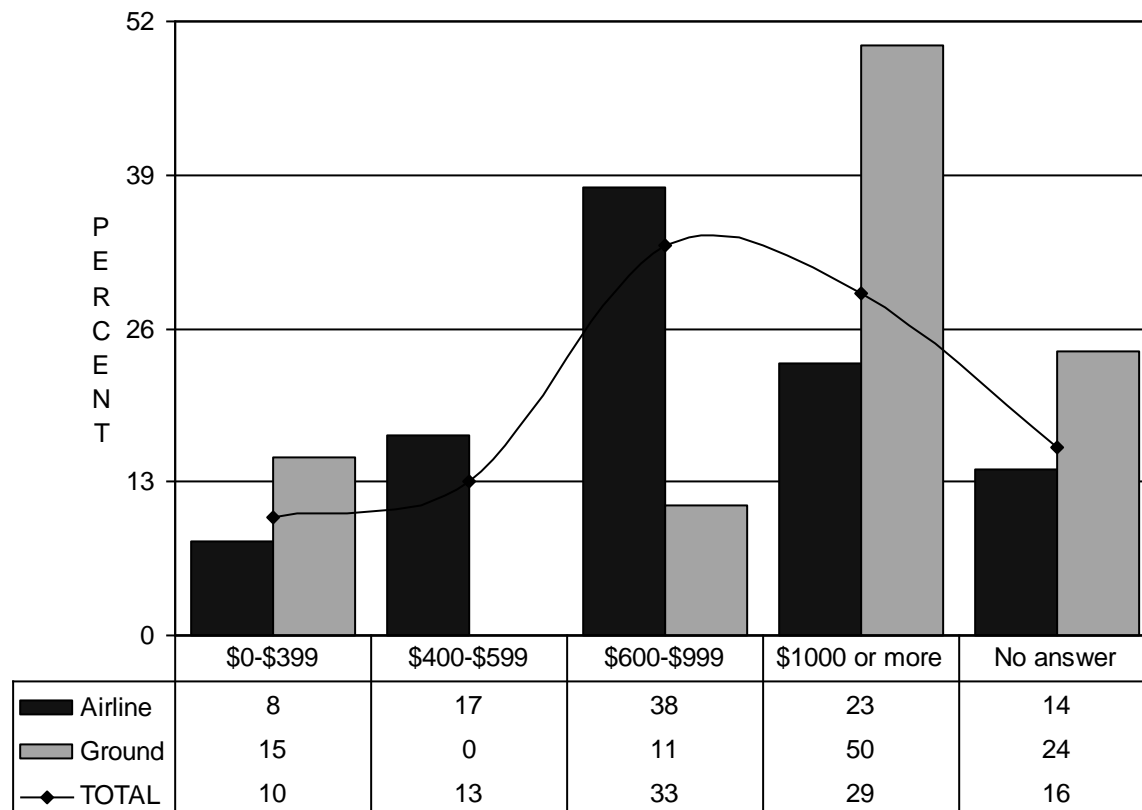
Looking at the type of room rates received by hotel/motel lodgers, visitors who arrived by ground transportation were more likely than airline visitors to have paid a regular room rate (44% vs. 33%), a casino complimentary rate (15% vs. 11%), or a tour group rate (3% vs. less than 1%). As might be expected, airline visitors were more likely than those who arrived by ground transportation to say their accommodations were part of a package deal (25% vs. 3%). Airline visitors were also more likely than those who arrived by ground transportation to say they paid a convention rate (10% vs. 2%).

FIGURE 38
Package Purchasers
(Among Those Staying In A Hotel Or Motel)



Airline visitors were more likely than those who arrived by ground transportation to be visiting Las Vegas as part of a tour group or package deal (25% vs. 6%).

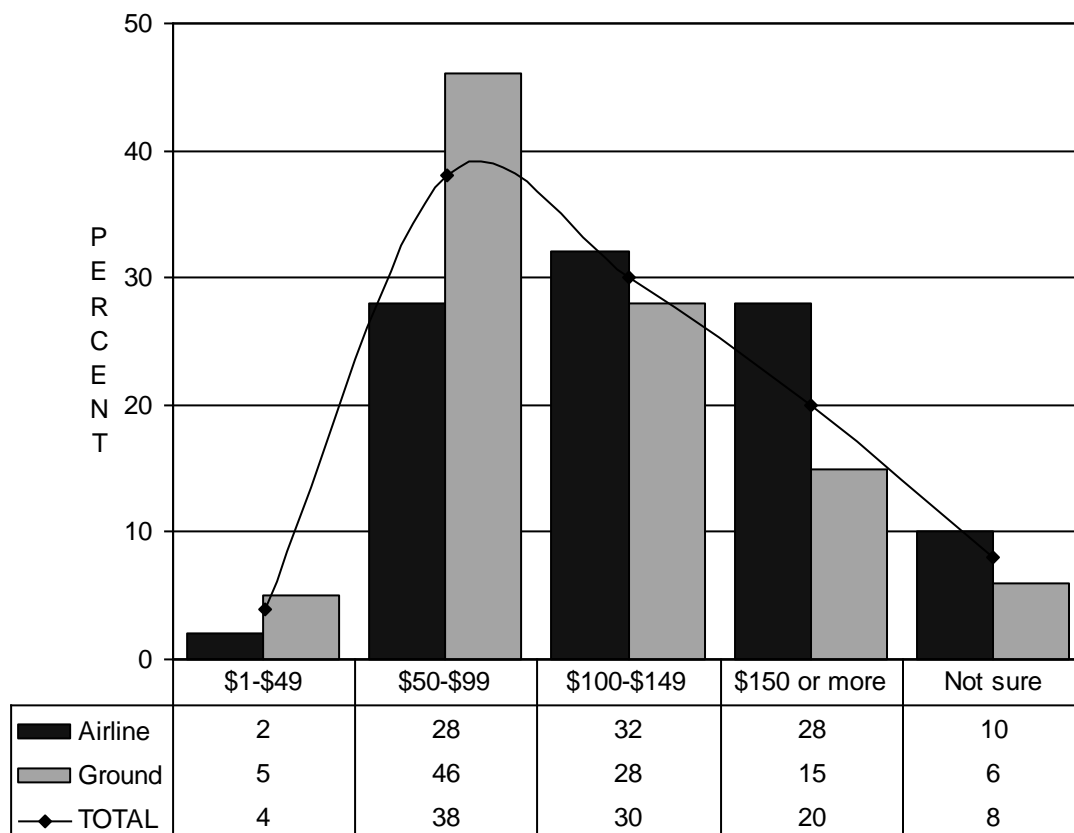
FIGURE 39
Cost Of Package Per Person
(Among Those Who Bought A Package)



(Base Sizes: Airline=388, Ground=100, TOTAL=487)
(Mean: Airline=\$834.50, Ground=\$1,248.98, TOTAL=\$910.99)

We asked those visitors who purchased either a hotel or a tour/travel group package how much their package cost per person. The average package cost was \$910.99. Airline visitors (\$834.50) paid less for their package than those who traveled to Las Vegas by other means (\$1,248.98).

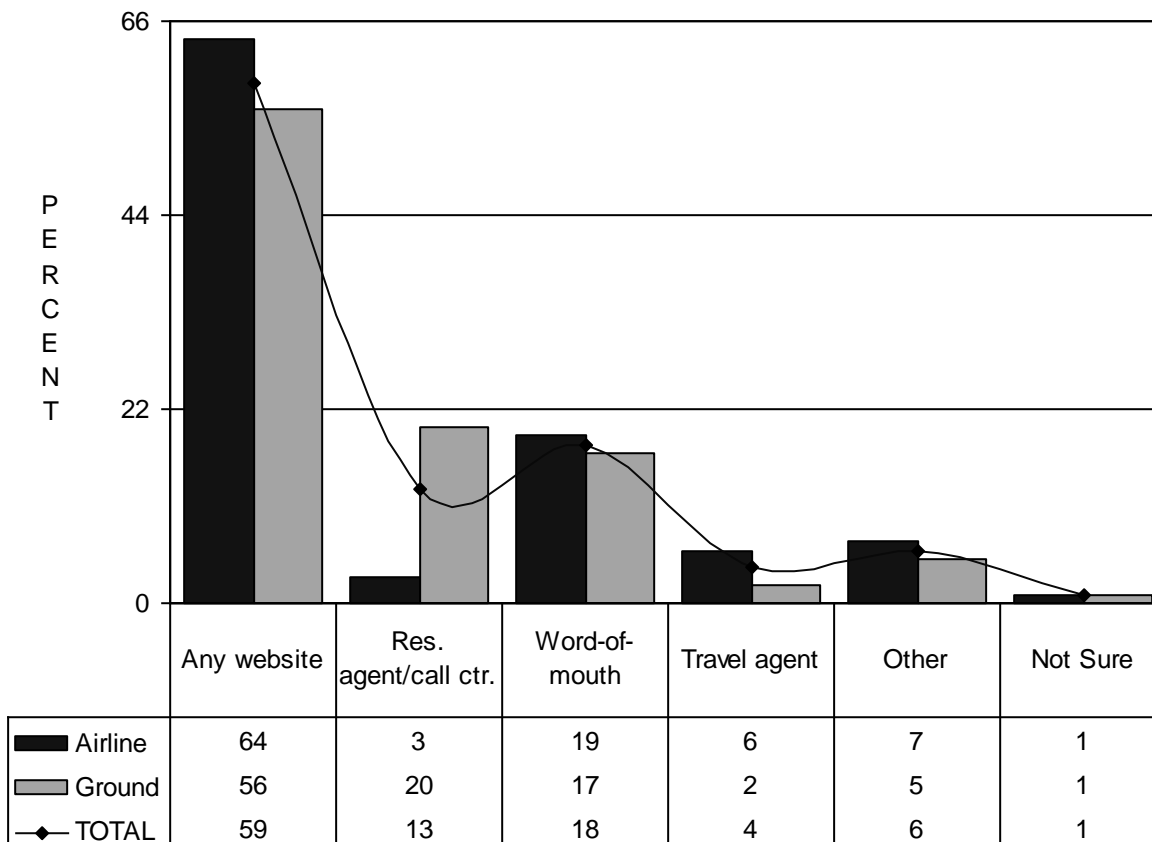
FIGURE 40
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel Or Motel/Non-Package And Non-Comp)



(Base Sizes: Airline=985, Ground=1280, TOTAL=2265)
(Means: Airline=\$128.60, Ground=\$102.64, TOTAL=\$113.66)

We looked at lodging expenditures among visitors whose room was not part of a travel package and who were not comped for their stay. Airline visitors paid more for lodging per night (average of \$128.60) than those who arrived by ground transportation (\$102.64).

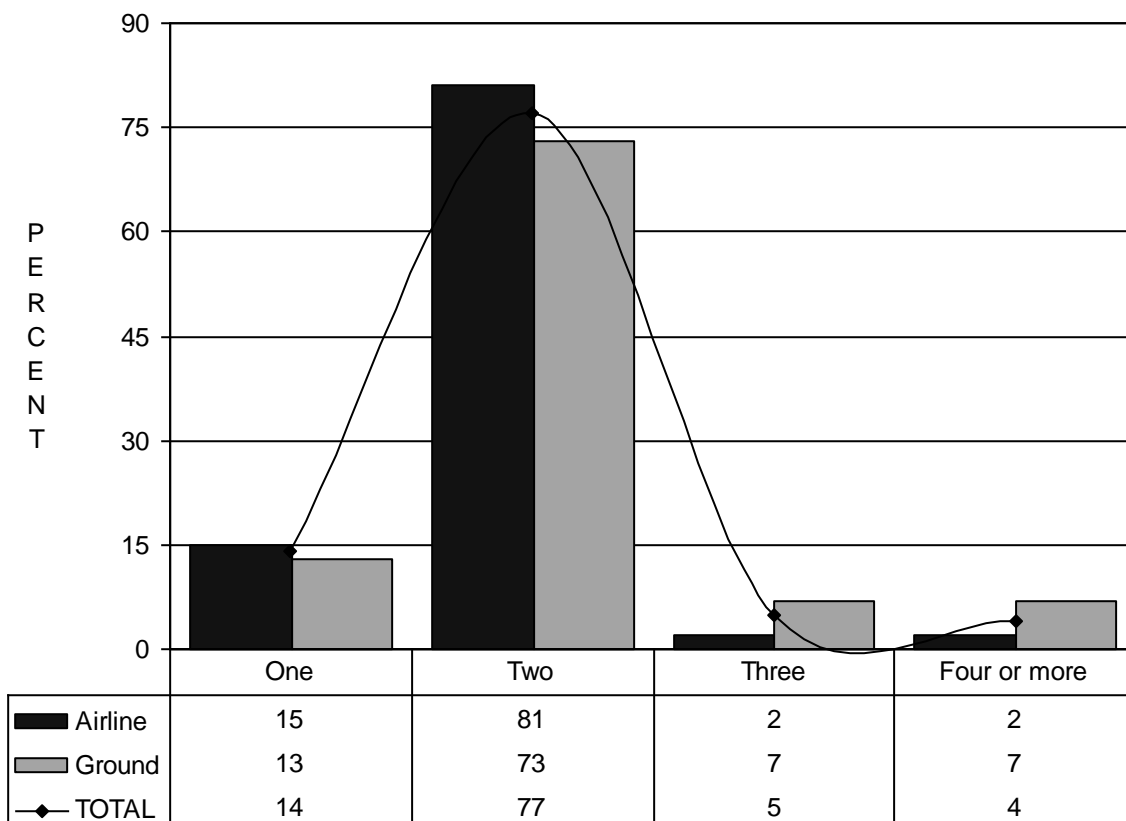
FIGURE 41
How First Found Out About Room Rate
(Among Those Staying In A Hotel Or Motel/Non-Package)



(Base Sizes: Airline=985, Ground=1280, TOTAL=2265)

Visitors were asked how they first found out about the room rate they paid. Overall, 59% of visitors first heard about their rate on a website and 18% through word of mouth. Those visitors who arrived by ground transportation were more likely than airline visitors to say they first found out about the rate through a reservation agent (20% vs. 3%). Airline visitors were more likely than those who arrived by other means to say they initially found out about their room rate through a website (64% vs. 56%) or through a travel agent (6% vs. 2%).

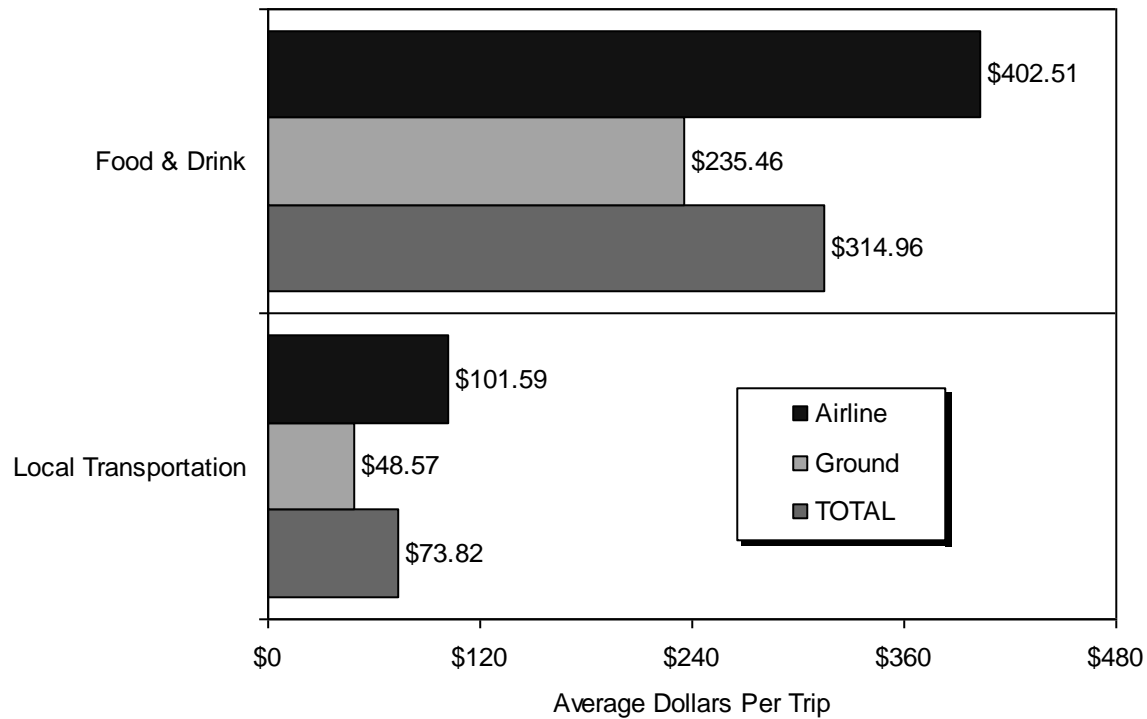
FIGURE 42
Number Of Room Occupants
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Airline=1580, Ground=1640, TOTAL=3220)
(Means: Airline=1.9, Ground=2.1, TOTAL=2.0)

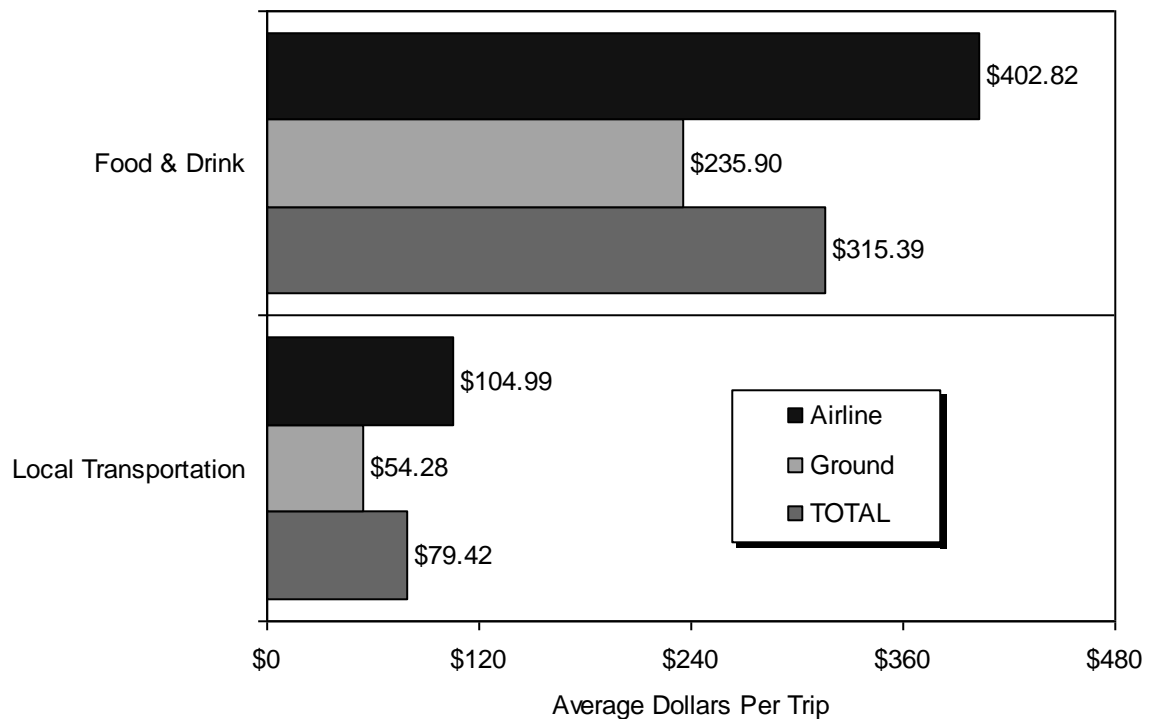
Looking only at visitors who stayed in a hotel or motel, airline visitors were more likely than those who arrived by ground transportation to say that two (81% vs. 73%) people stayed in their room. Those visitors who arrived by ground transportation were more likely than airline visitors to say three or more people stayed in their room (14% vs. 4%). The average number of room occupants was greater for those visitors who arrived by ground transportation (average of 2.1 room occupants) than for airline visitors (1.9).

FIGURE 43
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Including Visitors Who Spent Nothing In That Category)



The average trip expenditure for food and drink was higher for airline visitors (\$402.51) than for those who arrived by ground transportation (\$235.46). Similarly, the average trip expenditure for local transportation was greater for airline visitors (\$101.59) than for those who arrived by ground transportation (\$48.57).

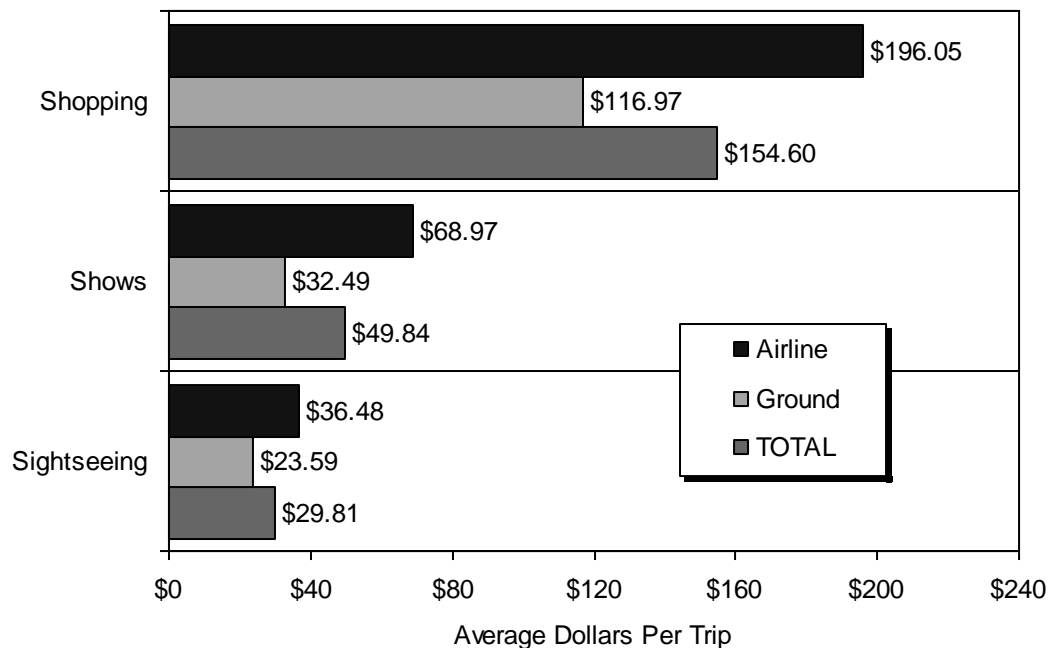
FIGURE 44
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Among Spenders)



(Base Sizes, Food & Drink: Airline=1712, Ground=1882, TOTAL=3594)
(Base Sizes, Local Transportation: Airline=1658, Ground =1687, TOTAL=3346)

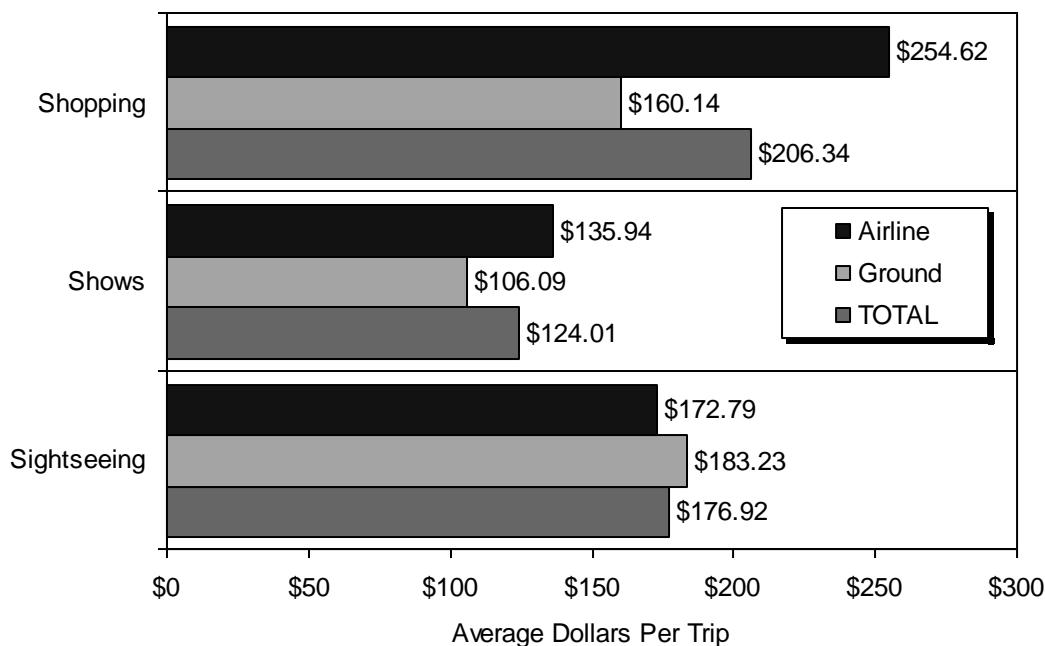
Looking only at *visitors who actually spent money* in these categories, airline visitors on average spent more on food and drink (\$402.82) and local transportation (\$104.99) than those who arrived by ground transportation (\$235.90 for food and drink and \$54.28 for local transportation).

FIGURE 45
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Including Visitors Who Spent Nothing In That Category)



This figure shows average per trip expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas, including visitors who said they spent nothing in these categories. Airline visitors spent more than those who arrived by ground transportation in all three categories. Specifically, airline visitors spent an average of \$196.05 on shopping, \$68.97 on shows and \$36.48 on sightseeing. Among visitors who arrived by ground transportation, the average totals spent were \$116.97 on shopping, \$32.49 on shows and \$23.59 on sightseeing.

FIGURE 46
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Among Spenders)

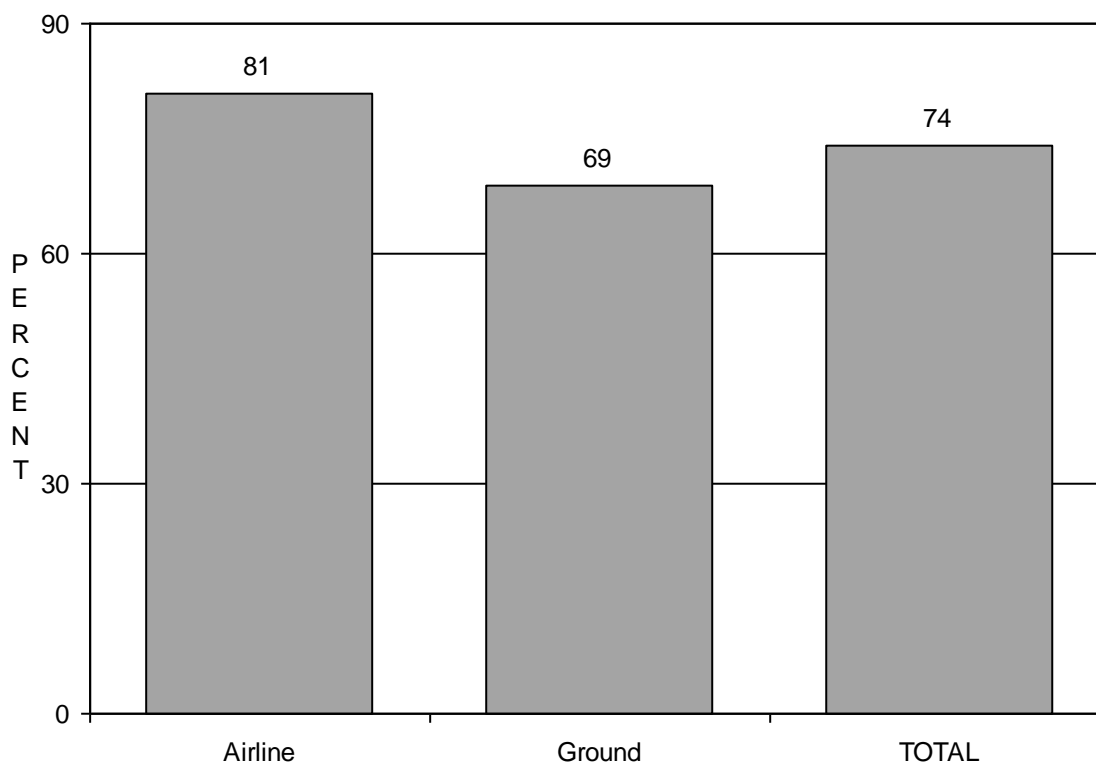


(Base Sizes, Shopping: Airline=1320, Ground=1377, TOTAL=2697)
 (Base Sizes, Shows: Airline=873, Ground=581, TOTAL=1454)
 (Base Sizes, Sightseeing: Airline=369, Ground=295, TOTAL=663)

Among visitors who spent money in these categories, airline visitors spent more on average than those who arrived by ground transportation on shopping and shows. Specifically, airline visitors spent an average of \$254.62 for shopping and, \$135.94 on shows, while visitors who arrived by ground transportation spent an average of \$160.14 for shopping and \$106.09 on shows. The average amount among spending visitors on sightseeing was \$176.92, with no difference between the two segments.

GAMING BEHAVIOR AND BUDGETS

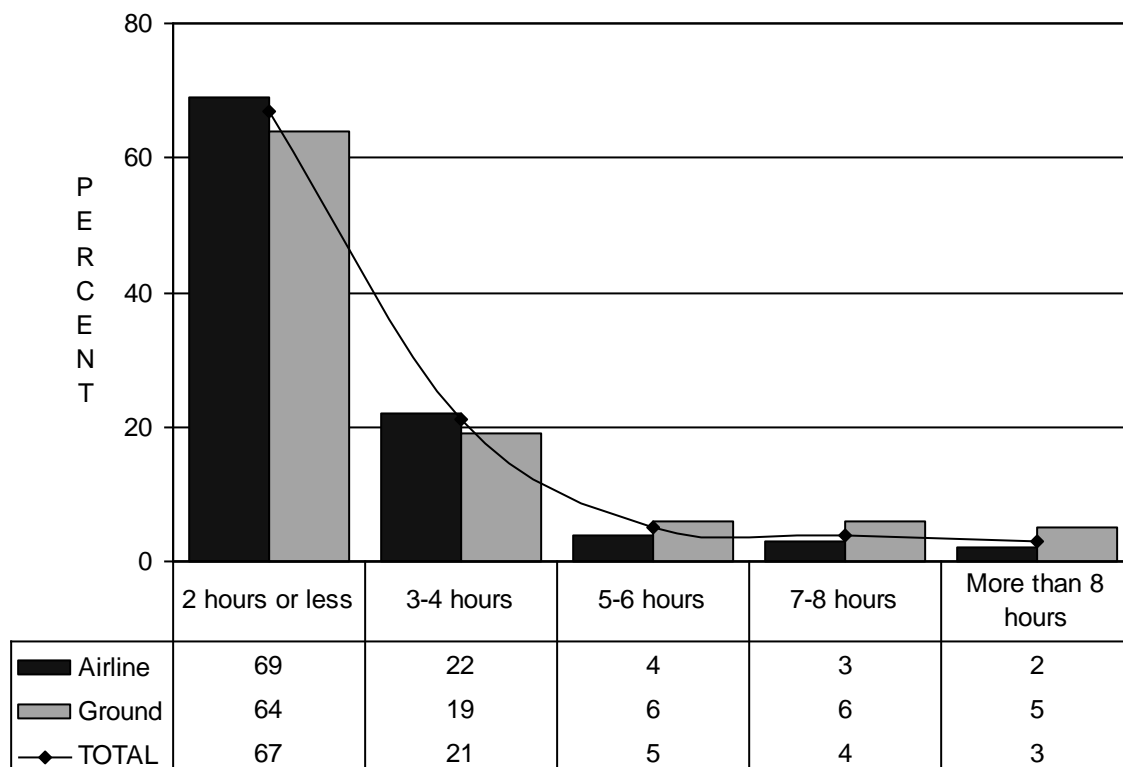
FIGURE 47
Whether Gambled While In Las Vegas



Only "yes" responses are reported in this figure.

Seventy-four percent (74%) of all Las Vegas visitors gambled while in Las Vegas. Airline visitors (81%) were more likely to have gambled than those who arrived by ground transportation (69%).

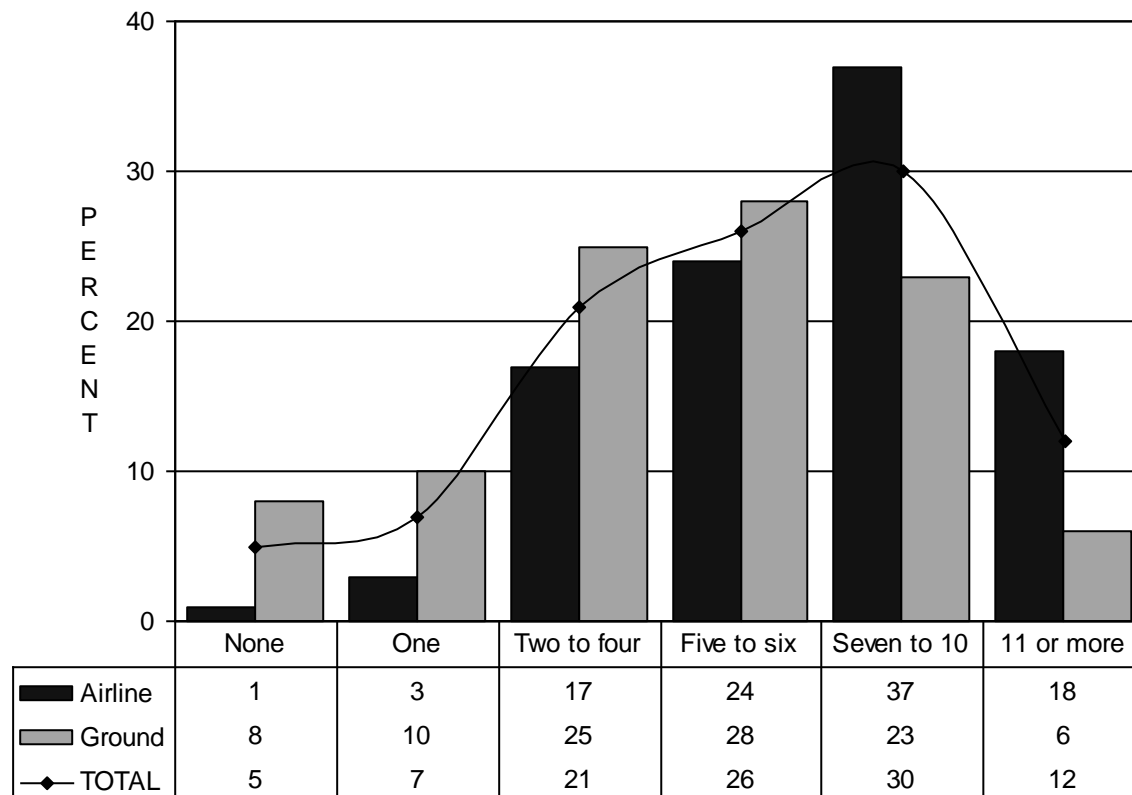
FIGURE 48
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



(Base Sizes: Airline=1386, Ground=1294, TOTAL=2679)
(Means: Airline=2.0, Ground=2.5, TOTAL=2.2)

Among those visitors who gambled while in Las Vegas, the average number of hours spent gambling per day was 2.2. Those visitors who arrived by ground transportation (mean of 2.5 hours) averaged more time gambling per day than airline visitors (2.0 hours).

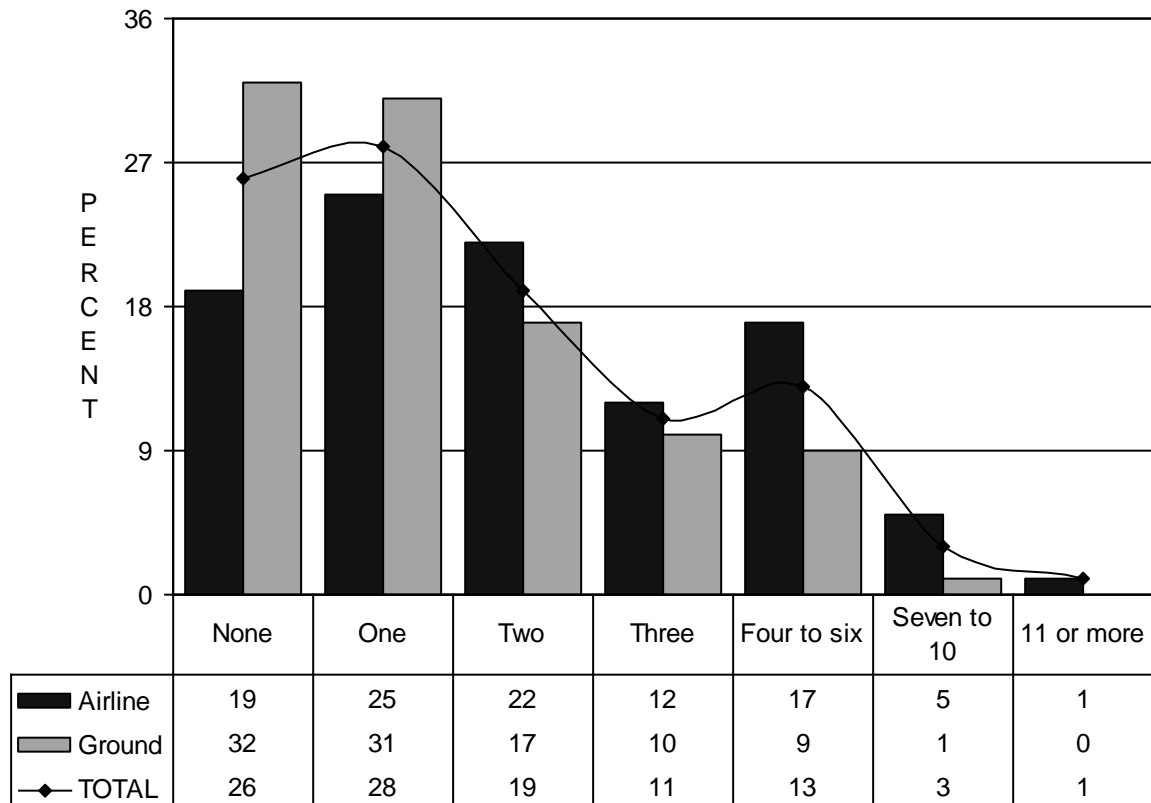
FIGURE 49
Number Of Casinos Visited



(Means: Air=7.6, Ground=5.2, TOTAL=6.4)

All visitors to Las Vegas were asked how many casinos they had visited on their current trip. Airline visitors visited more casinos on average (7.6) than those who arrived by ground transportation (5.2).

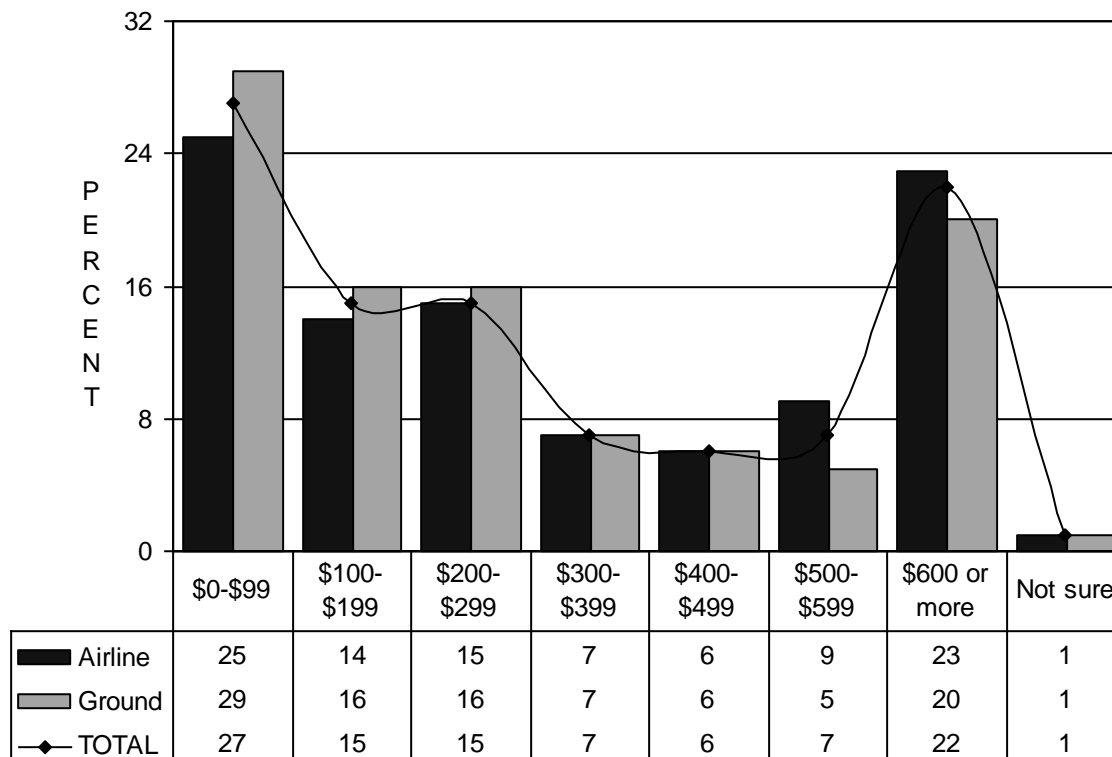
FIGURE 50
Number Of Casinos Where Gambled



(Means: Air=2.4, Ground=1.5, TOTAL=1.9)

All visitors to Las Vegas were asked in how many casinos they had gambled on their current trip. Airline visitors gambled in more casinos on average (2.4) than those who arrived by ground transportation (1.5).

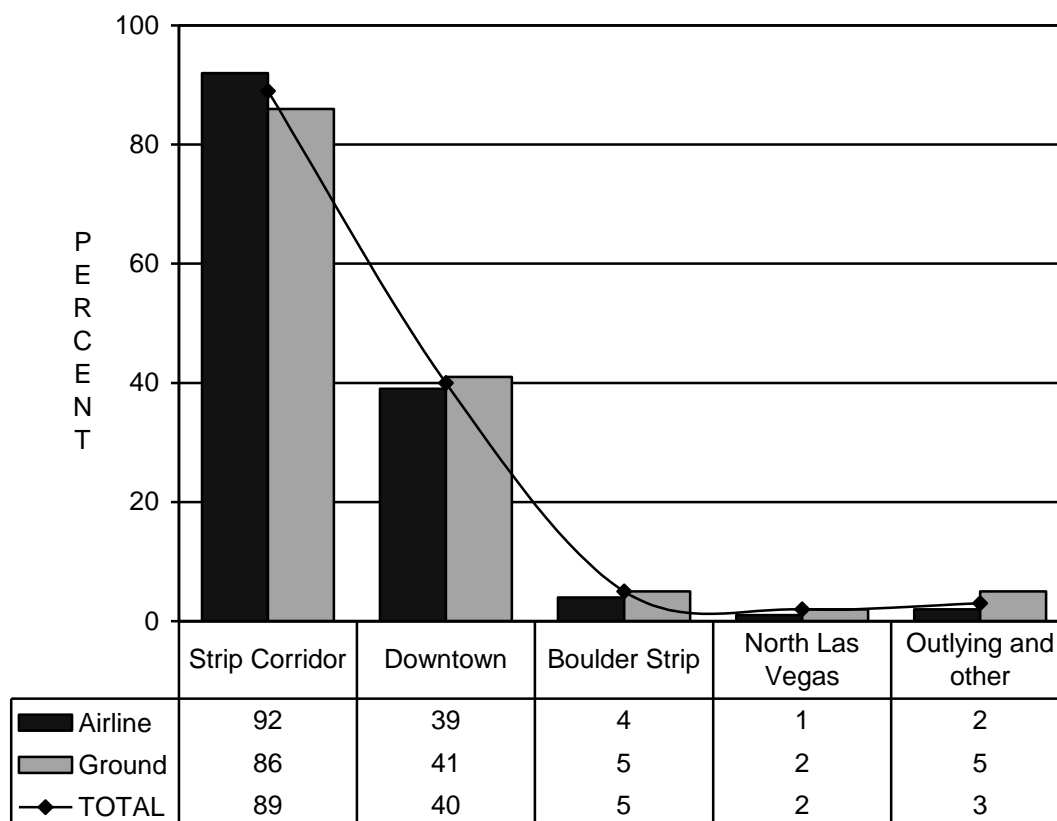
FIGURE 51
Trip Gambling Budget
(Among Those Who Gambled)



(Base Sizes: Airline=1386, Ground=1294, TOTAL=2679)
(Means: Airline=\$634.21, Ground=\$412.31 TOTAL=\$527.05)

Among those visitors who gambled while in Las Vegas, the average trip gambling budget was \$527.05. Airline visitors budgeted on average more than those who arrived by ground transportation (\$634.21 vs. \$412.31).

FIGURE 52
Where Visitors Gambled*
(Among Those Who Gambled)



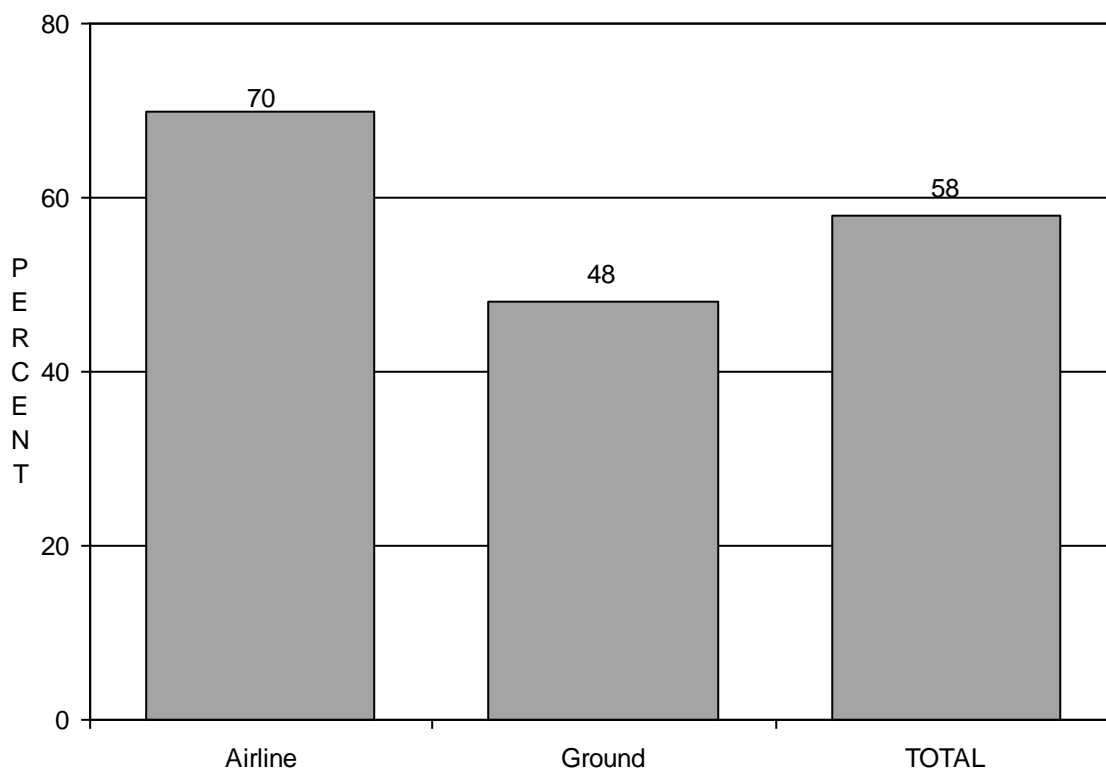
Multiple responses were permitted.
(Base Sizes: Airline=1301, Ground=1351, TOTAL=2652)

Airline visitors were more likely than those who arrived by ground transportation to have gambled on the Strip Corridor (92% vs. 86%). Those visitors who arrived by ground transportation were more likely than airline visitors to have gambled in outlying or other areas (5% vs. 2%).

* These results are from 2017. This question is asked every other year and was not asked in 2018.

ENTERTAINMENT

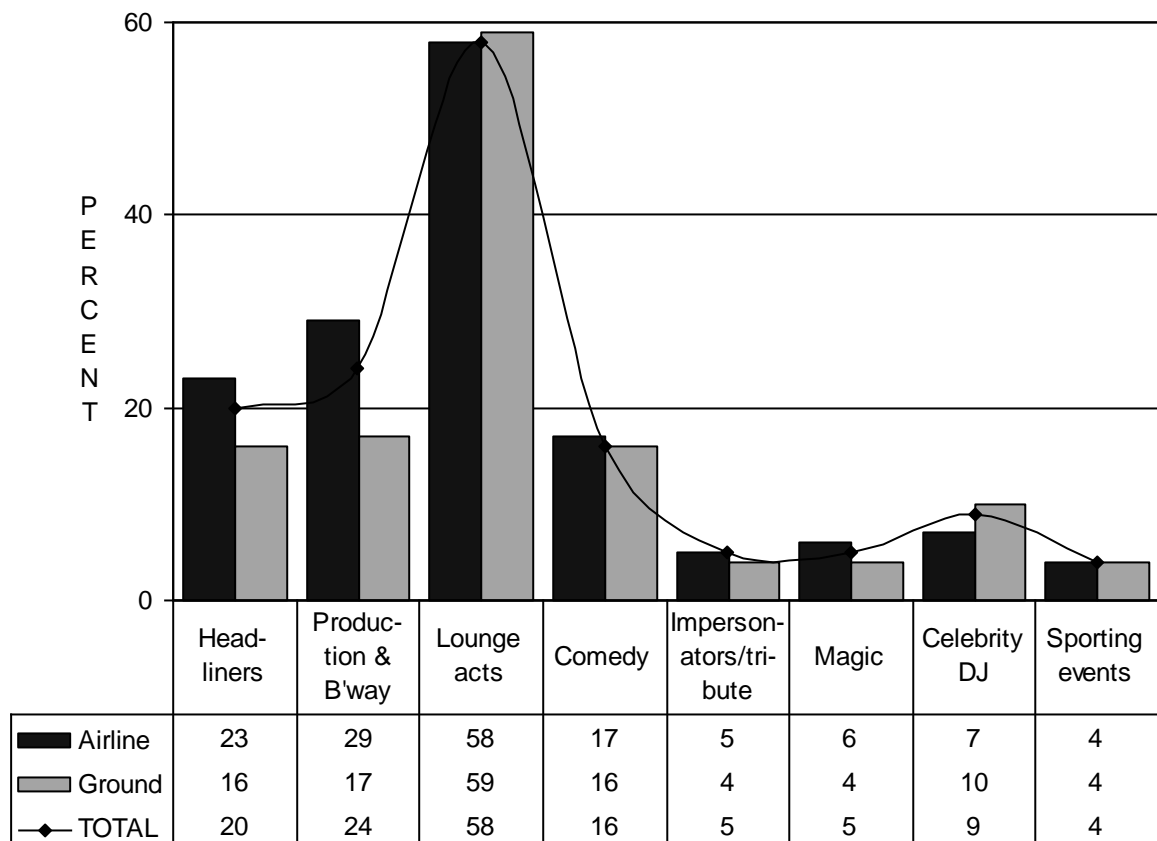
FIGURE 53
Attended A Show



Only "yes" responses are reported in this figure.

During their stay in Las Vegas, 58% of visitors saw at least one show. Airline visitors (70%) were more likely than those who arrived by ground transportation (48%) to have gone to a show.

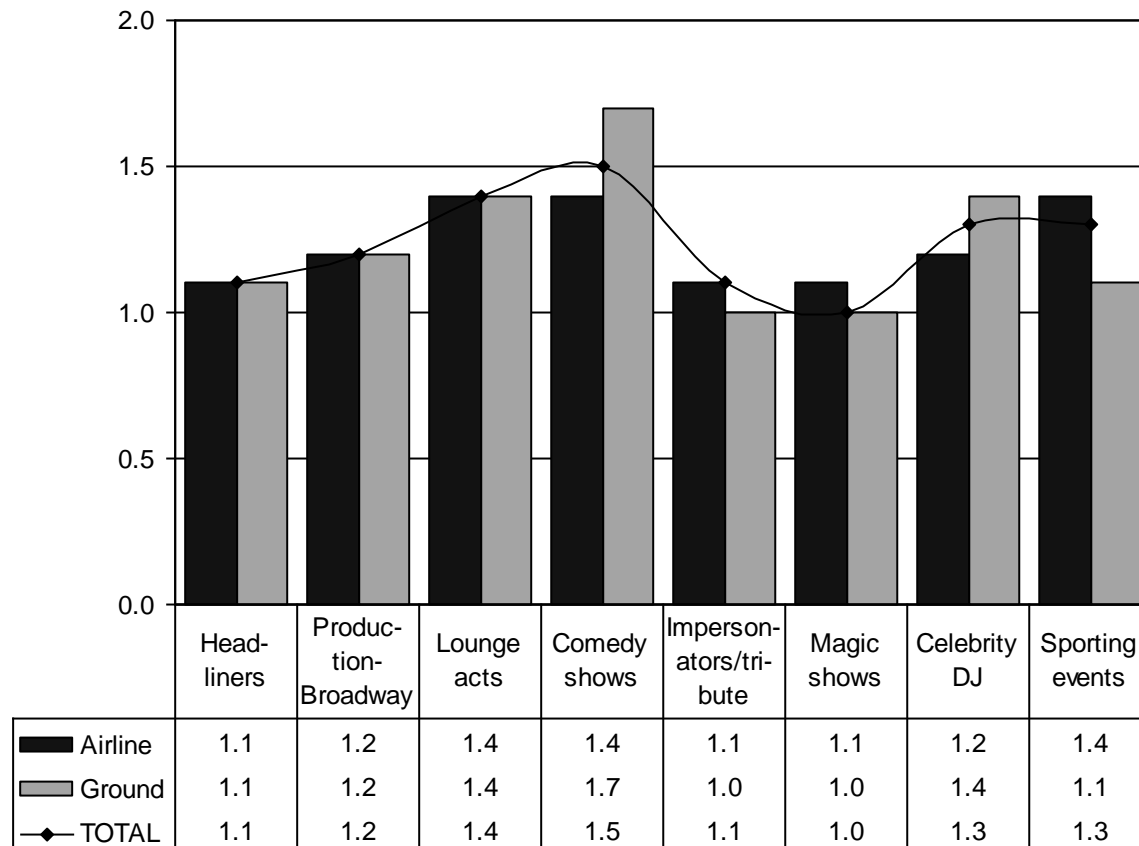
FIGURE 54
Types Of Entertainment
(Among Those Who Attended Some Form Of Entertainment)



Multiple responses permitted.
(Base Sizes: Airline=1199, Ground=896, TOTAL=2096)

Among those visitors who attended shows, 58% attended a lounge act. Airline visitors were more likely than those who arrived by ground transportation to attend Las Vegas style production shows (29% vs. 17%), shows featuring big-name headliners (23% vs. 16%), and magic shows (6% vs. 4%).

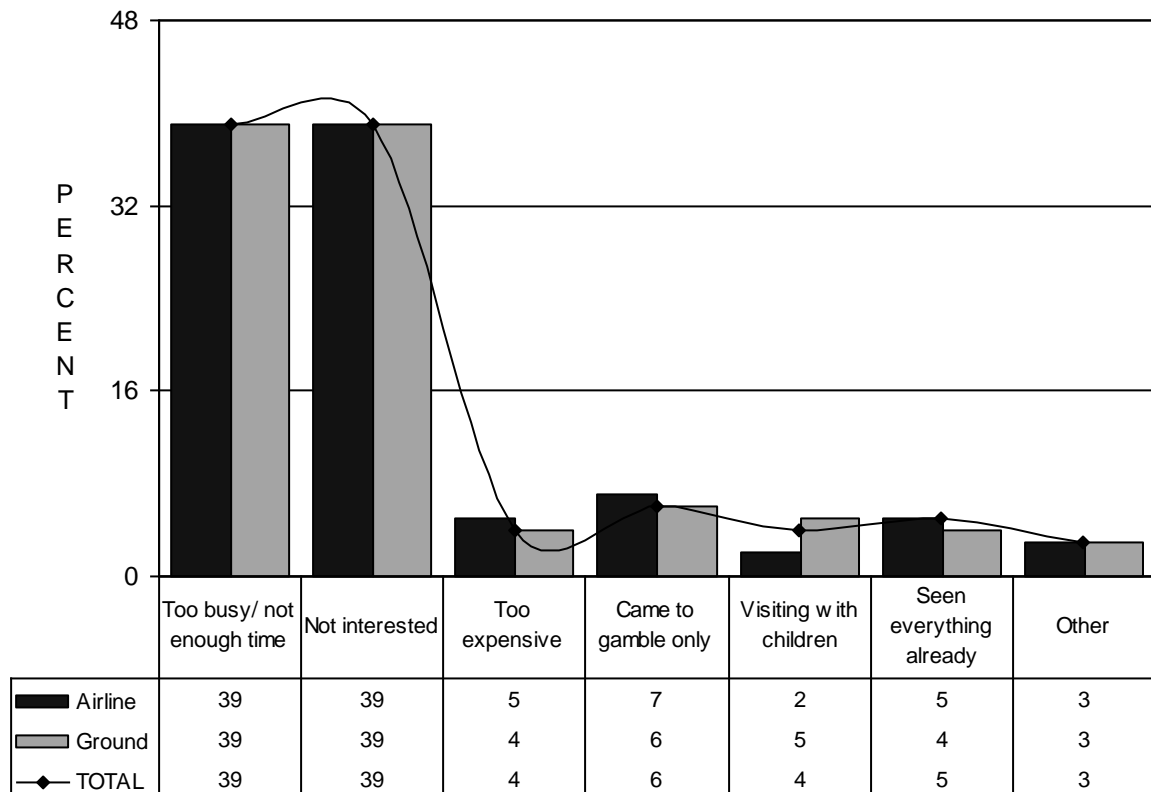
FIGURE 55
Average Number Of Shows Attended
(Among Those Who Attended Some Form Of Entertainment)



Multiple responses permitted.
(Base Sizes: Airline=1199, Ground=896, TOTAL=2096)

We looked at the average number of times visitors attended each type of show among those who attended shows. Overall, visitors saw an average of 1.4 lounge acts, 1.1 headliner shows, 1.2 Broadway/production shows, 1.5 comedy shows, 1.1 impersonator/tribute shows, 1.0 magic shows, 1.3 Celebrity DJ shows and 1.3 sporting events. There were no differences between airline visitors and those who arrived by ground transportation on these measures.

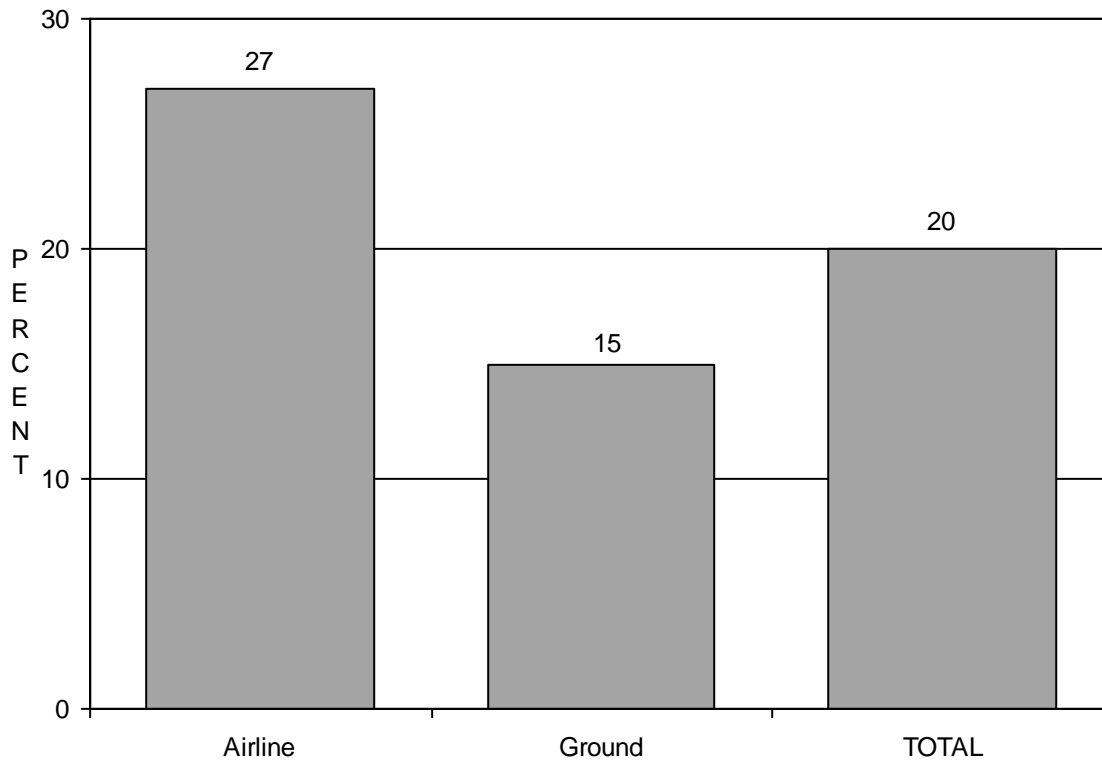
FIGURE 56
Main Reason For Not Attending Any Shows
(Among Those Who Attended No Shows)



(Base Sizes: Air=514, Ground=989, TOTAL=1503)

Visitors who did not attend any shows gave several reasons why they did not. The most common reasons given were a lack of time and a lack of interest in shows (39% each). There were no differences between airline visitors and those who arrived by ground transportation on this measure.

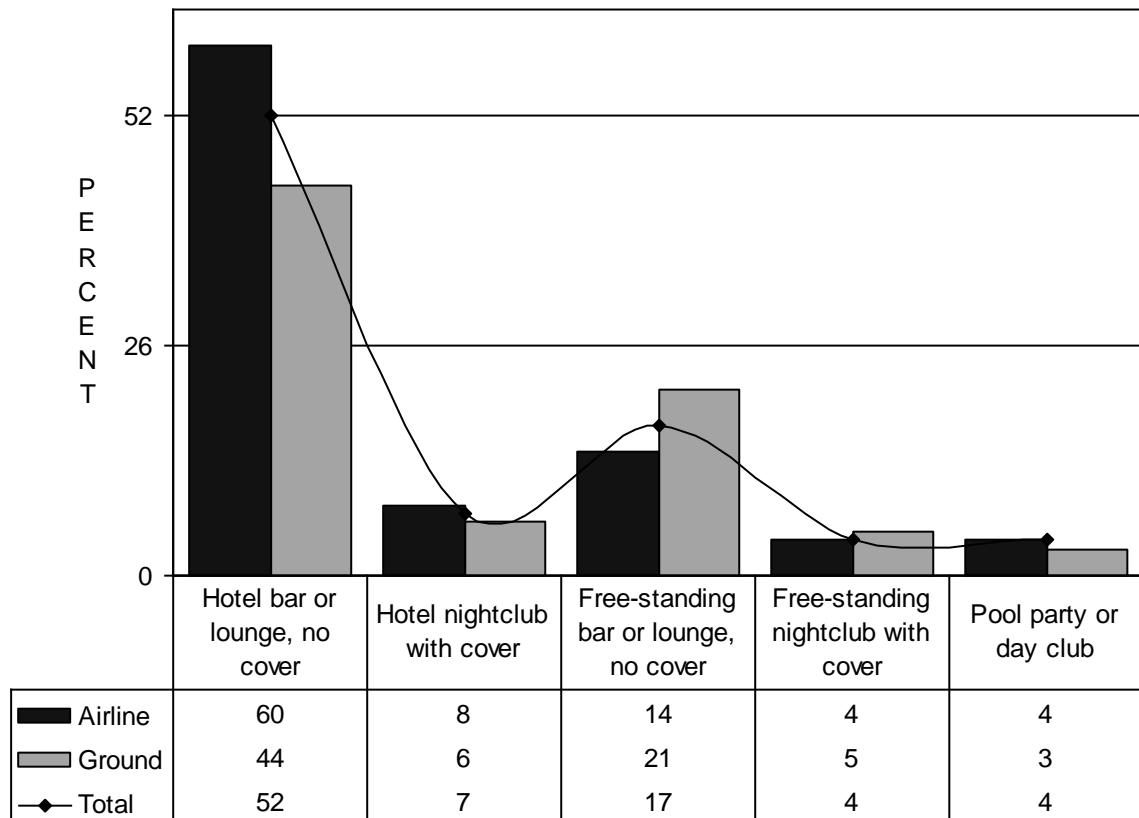
FIGURE 57
Whether Has Been To Other Paid Attractions



Only "yes" responses are reported in this figure.

We asked visitors if during their current trip to Las Vegas they had been to other Las Vegas attractions for which they had to pay. Twenty percent (20%) of all visitors said they had, with airline visitors (27%) more likely to have done so than those who arrived by ground transportation (15%).

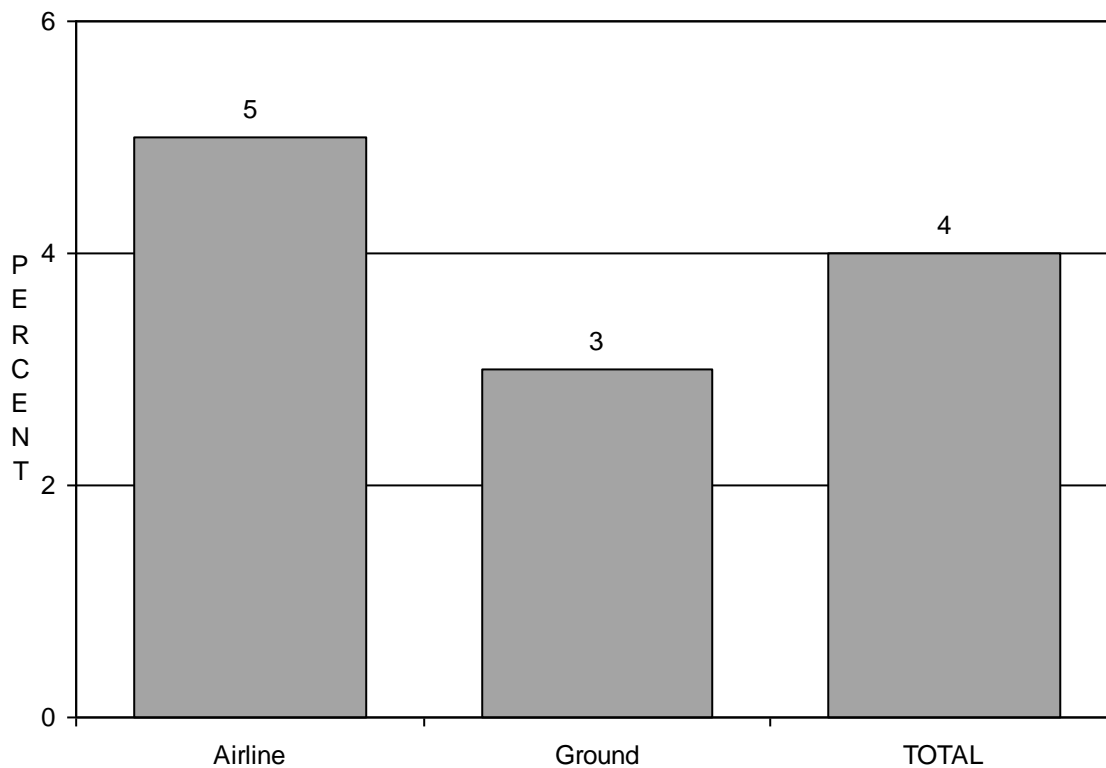
FIGURE 58
Whether Has Been To Nightclubs, Bars, And Lounges



Only "yes" responses are reported in this figure.

We asked visitors if they visited nightclubs, bars, lounges, or pool parties or day clubs while in Las Vegas. Airline visitors were more likely than those who arrived by ground transportation to say they had been to a hotel bar or lounge with no cover charge (60% vs. 44%). Those visitors who arrived by ground transportation were more likely than airline visitors to say they had been to a free-standing bar or lounge without a cover charge (21% vs. 14%).

FIGURE 59
Whether Visited A Spa

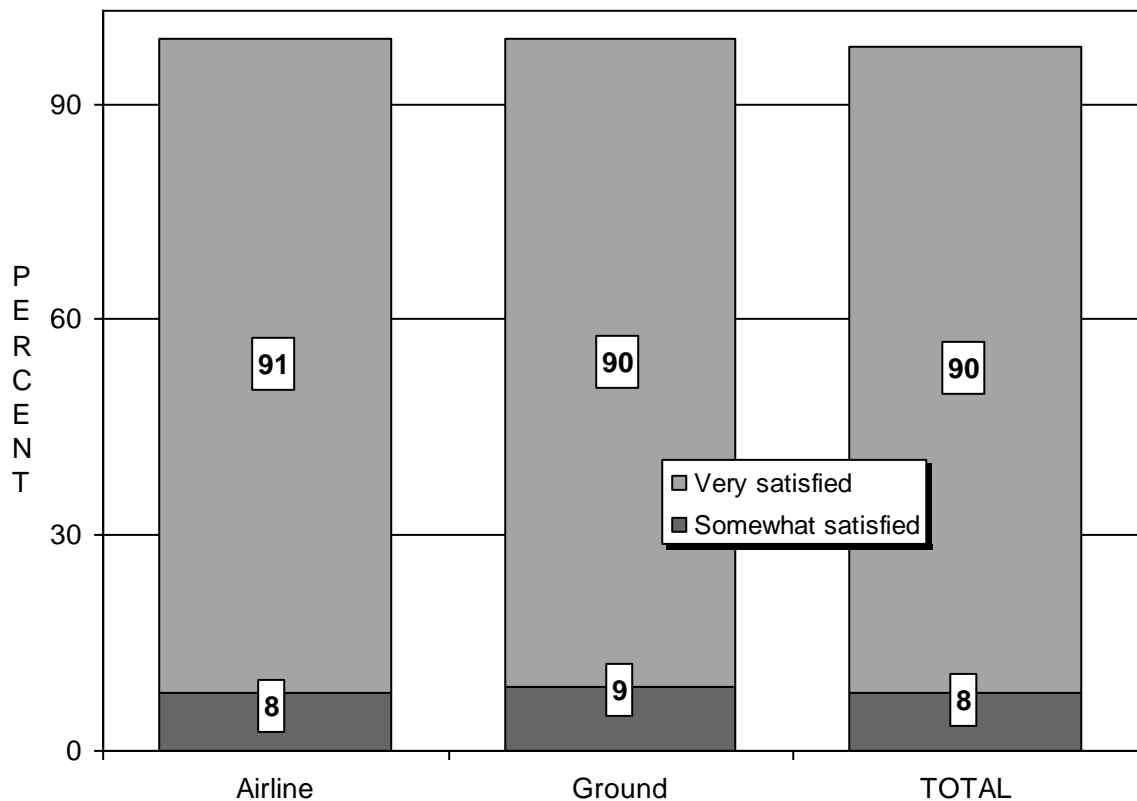


Only "yes" responses are reported in this figure.

Visitors were asked if they had visited a spa during this trip to Las Vegas. Four percent (4%) said they had. Airline visitors (5%) were more likely than those who arrived by ground transportation (3%) to have gone to a spa during their visit.

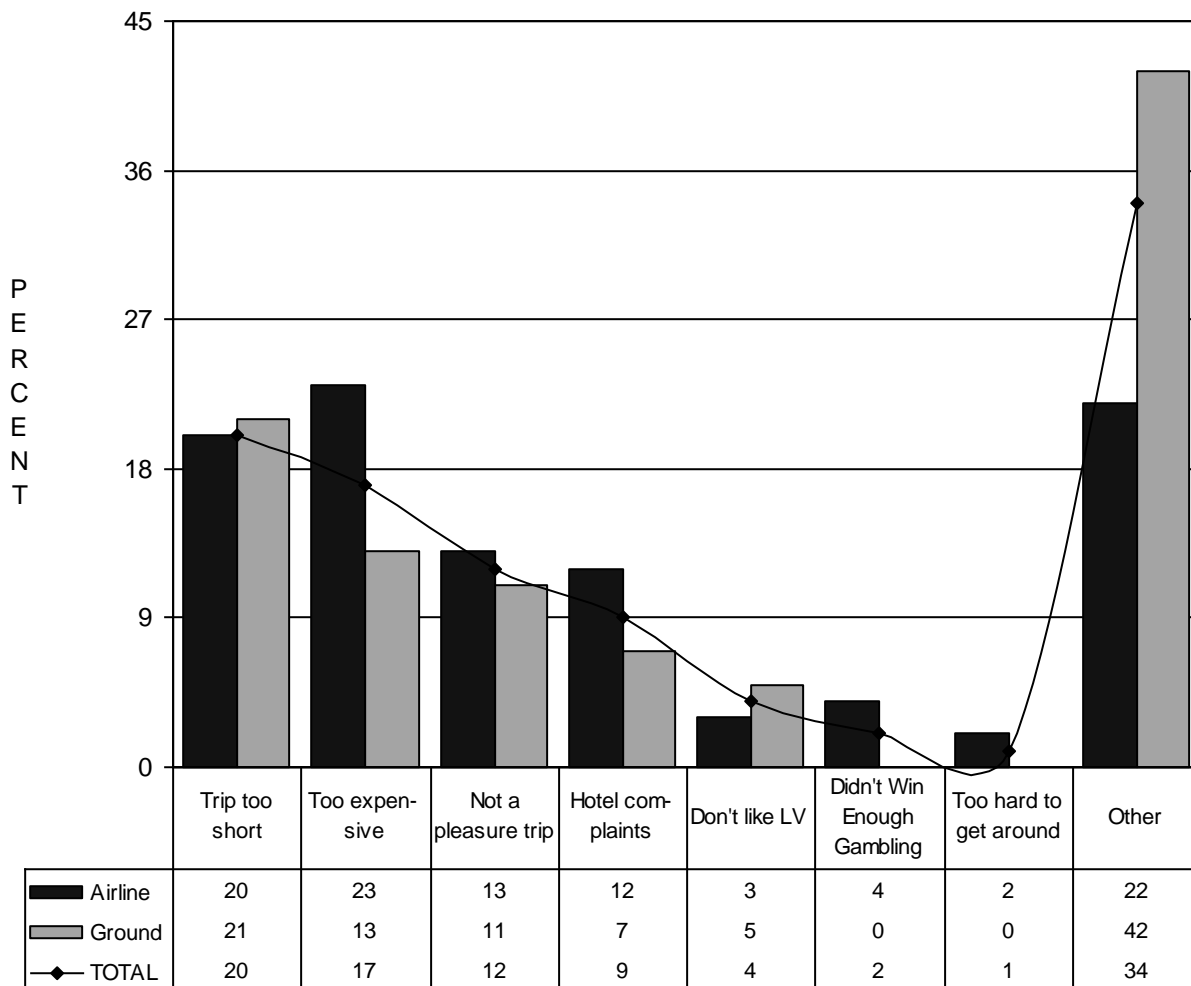
ATTITUDINAL INFORMATION

FIGURE 60
Satisfaction With Visit



The vast majority of visitors (90%) said that they were “very satisfied” with their visit to Las Vegas, while 8% indicated they were “somewhat satisfied”. There were no differences between airline visitors and those who arrived by ground transportation on this measure.

FIGURE 61
Why Not Completely Satisfied With Visit
(Among Those Who Were "Somewhat" Satisfied)



(Base Sizes: Air=141, Ground=162, TOTAL=304)

The figure above presents the key reasons why satisfaction levels were not higher among visitors who were only "somewhat satisfied" with their visit. Among the most common reasons given were the trip was too short (20%) and the trip was too expensive (17%). Airline visitors (23%) were more likely than visitors who arrived by ground transportation (13%) to say it was because Las Vegas is too expensive.

VISITOR DEMOGRAPHICS

Airline visitors were significantly more likely than those who arrived by ground transportation to be:

- College graduates (54% vs. 41%).
- Married (82% vs. 75%).
- 40 years old or older (63% vs. 52%).
- Having a household income of \$80,000 or more (56% vs. 47%).
- White (83% vs. 73%).
- From U.S. regions other than the West (55% vs. 13%).
- Foreign visitors (28% vs. 13%).

Those visitors who came to Las Vegas by ground transportation were more likely than airline visitors to be:

- With high school or less (21% vs. 16%) or some college or trade school education (39% vs. 30%).
- Single (19% vs. 13%).
- Less than 30 years old (24% vs. 15%).
- Having a household income of less than \$80,000 (46% vs. 34%).
- Hispanic/Latino (13% vs. 6%) or African American/Black (9% vs. 5%).
- From the Western region of the United States (74% vs. 18%), particularly California (39% vs. 5%) and Arizona (15% vs. 2%).

FIGURE 62
VISITOR DEMOGRAPHICS

	Airline	Ground	TOTAL
<u>GENDER</u>			
Male	50%	50%	50%
Female	50	50	50
<u>MARITAL STATUS</u>			
Married	82	75	79
Single	13	19	16
Separated/Divorced	3	6	5
Widowed	1	1	1
<u>EMPLOYMENT</u>			
Employed	69	67	68
Unemployed	1	2	2
Student	3	4	4
Retired	22	22	22
Homemaker	5	5	5
<u>EDUCATION</u>			
High school or less	16	21	18
Some college/trade school	30	39	35
College graduate	54	41	47
<u>AGE</u>			
21 to 29	15	24	20
30 to 39	22	24	23
40 to 49	21	17	19
50 to 59	17	12	14
60 to 64	5	5	5
65 or older	20	18	19
MEAN	46.5	43.8	45.1
BASE	(1714)	(1885)	(3599)

FIGURE 63
VISITOR DEMOGRAPHICS

	Airline	Ground	TOTAL
<u>ETHNICITY</u>			
White	83%	73%	77%
African American/Black	5	9	7
Asian/Asian American	2	3	2
Hispanic/Latino	6	13	10
Other	4	3	3
<u>HOUSEHOLD INCOME</u>			
Less than \$20,000	2	5	4
\$20,000 to \$39,999	4	8	6
\$40,000 to \$59,999	11	13	12
\$60,000 to \$79,999	17	20	19
\$80,000 or more	56	47	52
Not sure/no answer	11	7	9
<u>VISITOR ORIGIN</u>			
<u>U.S.A.</u>	<u>72</u>	<u>87</u>	<u>80</u>
Eastern states ¹	12	2	7
Southern states ²	26	7	16
Midwestern states ³	17	4	10
<u>Western states⁴</u>	<u>18</u>	<u>74</u>	<u>47</u>
California	<u>5</u>	<u>39</u>	<u>23</u>
Southern California	2	34	19
Northern California	3	5	4
Arizona	2	15	10
Other West	12	19	16
<u>Foreign</u>	<u>28</u>	<u>13</u>	<u>20</u>
BASE	(1714)	(1885)	(3599)

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

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

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

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