

LAS VEGAS VISITOR PROFILE

Calendar Year 2018

***Southern California and
International Visitors Version***

Research that works.

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VISITOR PROFILE STUDY

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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.

Visitors from Southern California and visitors from foreign countries are the focus of this report. The tables and charts in this report show data for all visitors and for three visitor subgroups:

- **VISITORS FROM SOUTHERN CALIFORNIA** — 19% of all visitors.
- **OTHER U.S. DOMESTIC VISITORS** — 61% of all visitors.
- **VISITORS FROM FOREIGN COUNTRIES** — 20% of all visitors.

This section presents the research highlights. The findings are presented in detail beginning on page 9.

VISITORS FROM SOUTHERN CALIFORNIA

Visitors from Southern California were the most likely to have:

- Visited Las Vegas before (98%).
- Visited Las Vegas primarily to gamble (16%).
- Planned their trip to Las Vegas one week to one month in advance (42%).
- Used a casino/hotel host to plan their trip to Las Vegas (17%).
- Booked their lodging one week to one month in advance of their trip (42%).
- Booked their accommodations by calling the property directly (27%).
- Received a casino comp (23%) rate for their lodging.
- Stayed three nights in Las Vegas (42%).
- Arrived in Las Vegas on a Friday (26%).

Visitors from Southern California were the most likely segment to:

- Be non-white (35%), especially Hispanic/Latino (20%).
- Have an annual household income of \$80,000 or more (61%).

During their visit to Las Vegas, Southern California visitors spent an average of:

- \$289.64 on food and drink.
- \$98.85 on shopping.
- \$35.50 on shows and entertainment.

OTHER U.S. DOMESTIC VISITORS

Domestic visitors from outside Southern California were the most likely segment to have:

- Attended a convention, trade show, association, or corporate meeting while in Las Vegas (9%).
- Consulted reviews at online travel agencies to plan their trip to Las Vegas (29%).
- Used a third-party website to book their accommodations (32%).
- Paid a convention rate for their room among those that lodged overnight (7%).
- Stayed only one night in Las Vegas (12%).
- Spent 3-4 hours per day gambling among those who gambled (24%).

Domestic visitors from outside Southern California were the most likely segment to:

- Be at least 40 years old (61%) and be older on average (46.1 years old).
- Have an annual household income of \$40,000 to \$59,999 (14%).

During their visit to Las Vegas, domestic visitors from outside Southern California spent an average of:

- \$309.40 on food and drink.
- \$140.50 on shopping.
- \$47.65 on shows and entertainment.

FOREIGN VISITORS

Foreign visitors were the most likely to have:

- Not visited Las Vegas before (47%).
- Visited Las Vegas primarily for vacation or pleasure (65%).
- Planned their trip to Las Vegas more than one month in advance (78%).
- Used a travel agent to plan their trip to Las Vegas (35%) and to book their accommodations (36% of those who lodged overnight).
- Used social media web sites (47%), magazines or newspapers (19%), and/or printed brochures or travel guides (16%) to plan their trip to Las Vegas.
- Visited Downtown on this trip to Las Vegas (58%).
- Stayed the longest in Las Vegas (average of 3.8 nights).
- Lodged on the Strip Corridor (85% of those who stayed overnight).
- Booked their accommodations in Las Vegas more than one month in advance (73% of those who stayed overnight).
- Received a package or tour/travel group rate for their lodgings (39%) and paid the most on average for their package (\$1,176.50).
- Used Google (48%), Vegas.com (24%), TripAdvisor (28%) and/or consulted reviews at hotel or show venue sites (17%) to plan activities during their visit.
- Seen at least one show during their current trip to Las Vegas (70%).
- Been to other Las Vegas attractions for which they had to pay (32%).

- Visited other areas of Nevada before or after their trip (41%).

Foreign visitors were the most likely segment to:

- Be single (20%).
- Be a student (7%).
- Have an annual household income of less than \$20,000 (8%).

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

- \$355.78 on food and drink.
- \$249.20 on shopping.
- \$70.20 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 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. 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 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. 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 Southern California visitors, other U.S. domestic visitors, and foreign visitors are pointed out in the text of the report. The tables and charts in this report show data for all visitors and for the three visitor origin subgroups.

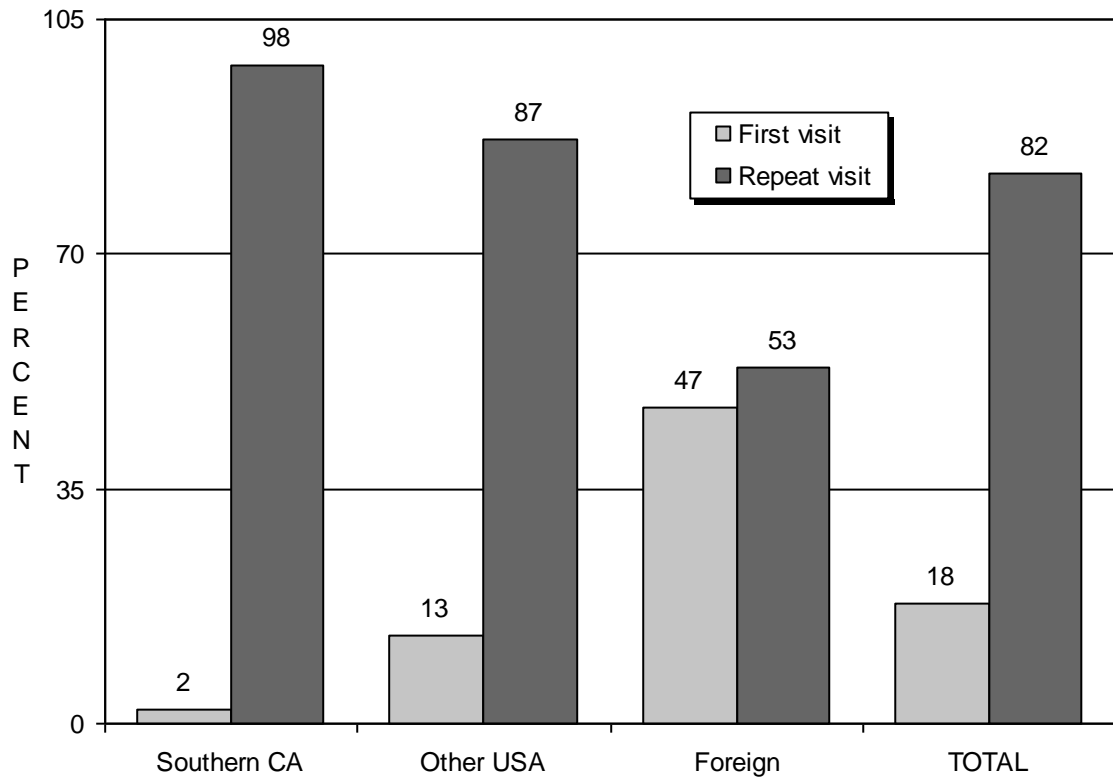
In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2018. These questions will be rotated back into the questionnaire in Calendar Year 2019 and subsequently asked every other year. These questions are noted in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

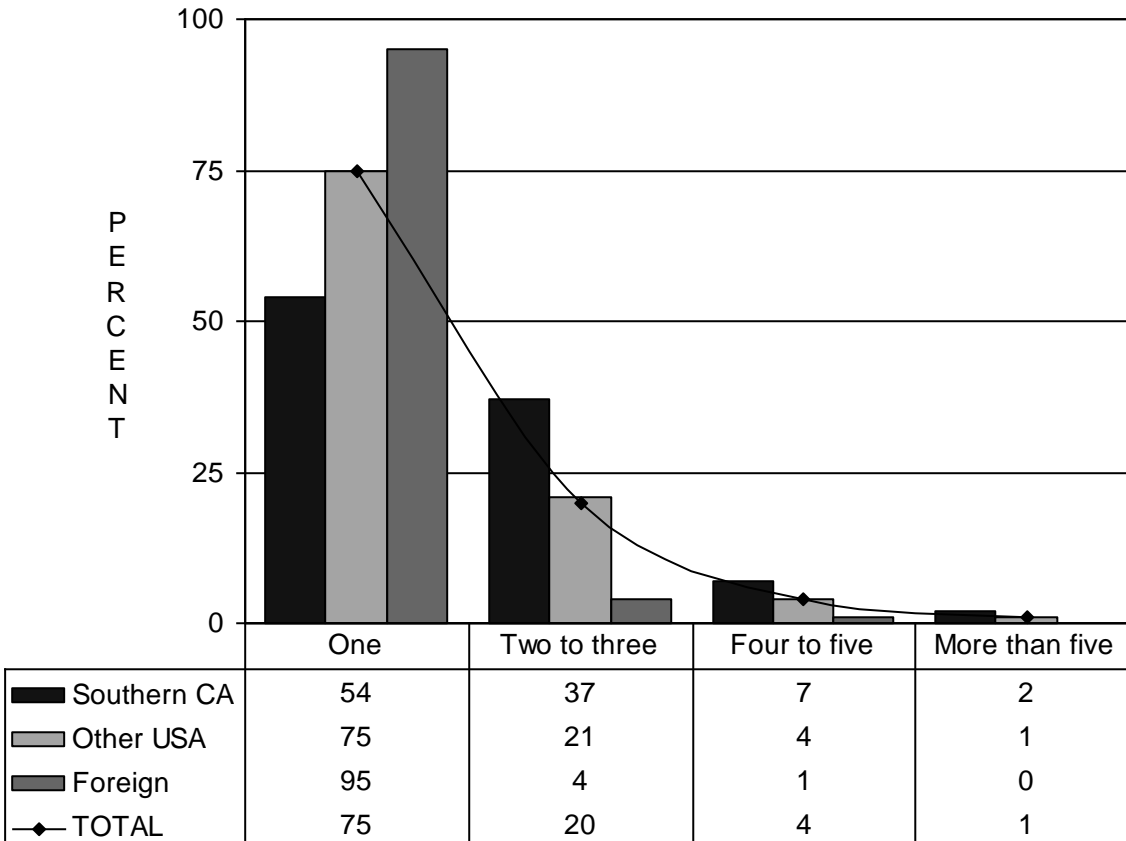
REASONS FOR VISITING

FIGURE 1
First Visit Vs. Repeat Visit



Southern California visitors (98%) were significantly more likely than other domestic visitors (87%) to say they had visited Las Vegas before, while both were more likely than foreign visitors (53%) to be repeat visitors.

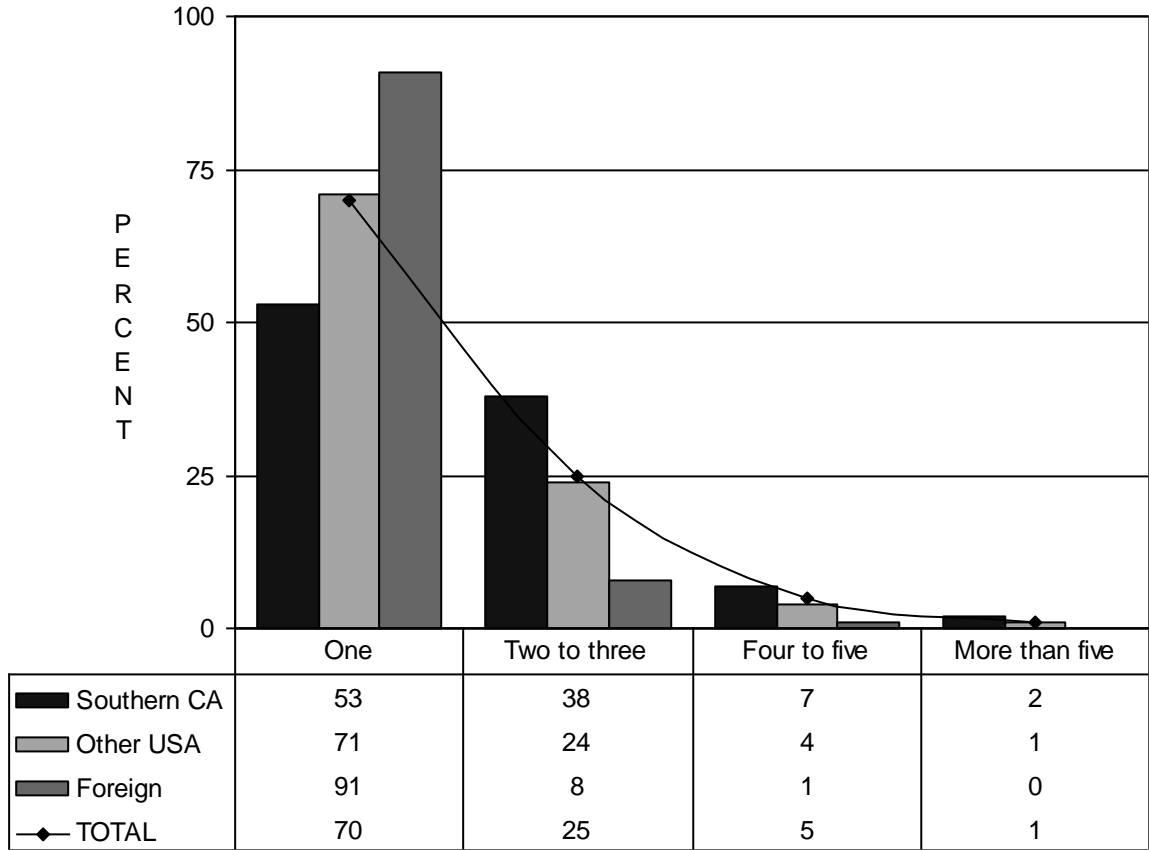
FIGURE 2
Frequency Of Visits In Past Year
(Among All Visitors)



(Means: Southern CA=1.8, Other USA=1.5, Foreign=1.1, TOTAL=1.5)

Forty-six percent (46%) of Southern California visitors visited Las Vegas more than once during the past year, compared to 26% of other domestic visitors, and 5% of foreign visitors. The average number of visits during the past year was highest for Southern California visitors (1.8 visits) and lowest for foreign visitors (1.1 visits).

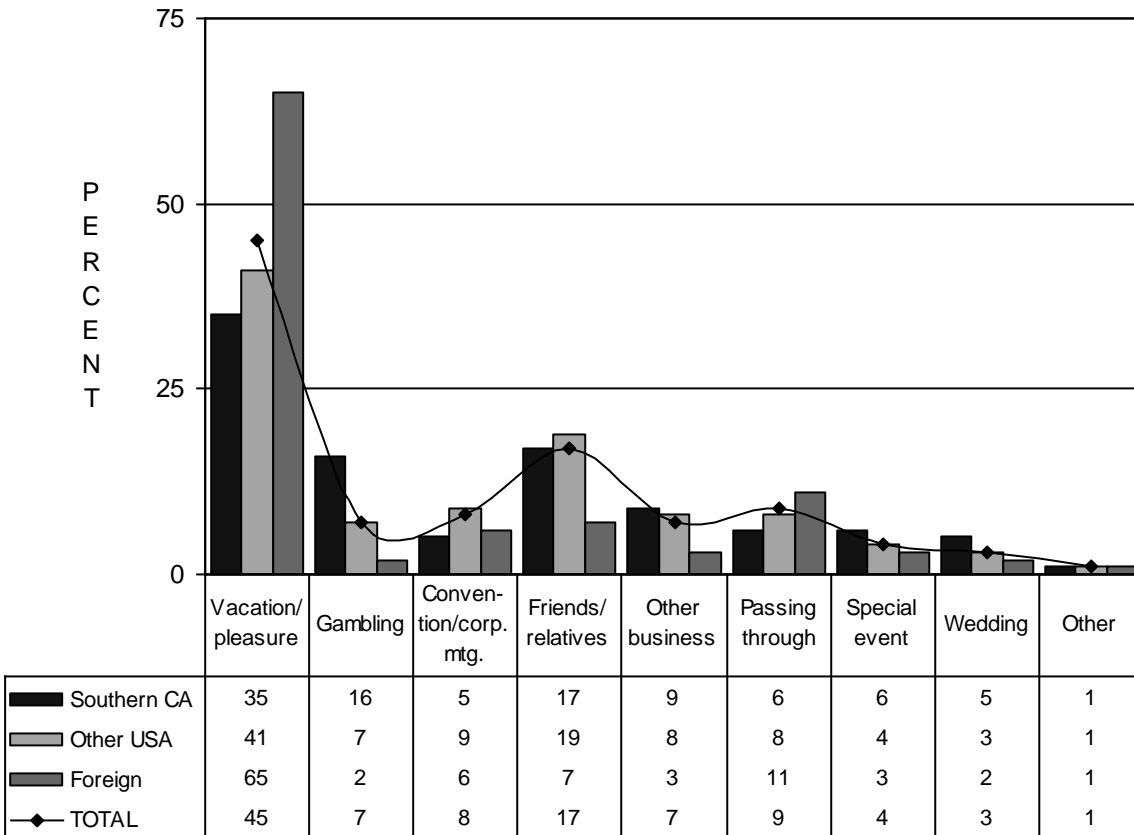
FIGURE 3
Frequency Of Visits In Past Year
(Among Repeat Visitors)



(Base Sizes: Southern CA=657, Other USA=1917, Foreign=386, TOTAL=2963)
(Means: Southern CA=1.9, Other USA=1.5, Foreign=1.1, TOTAL=1.6)

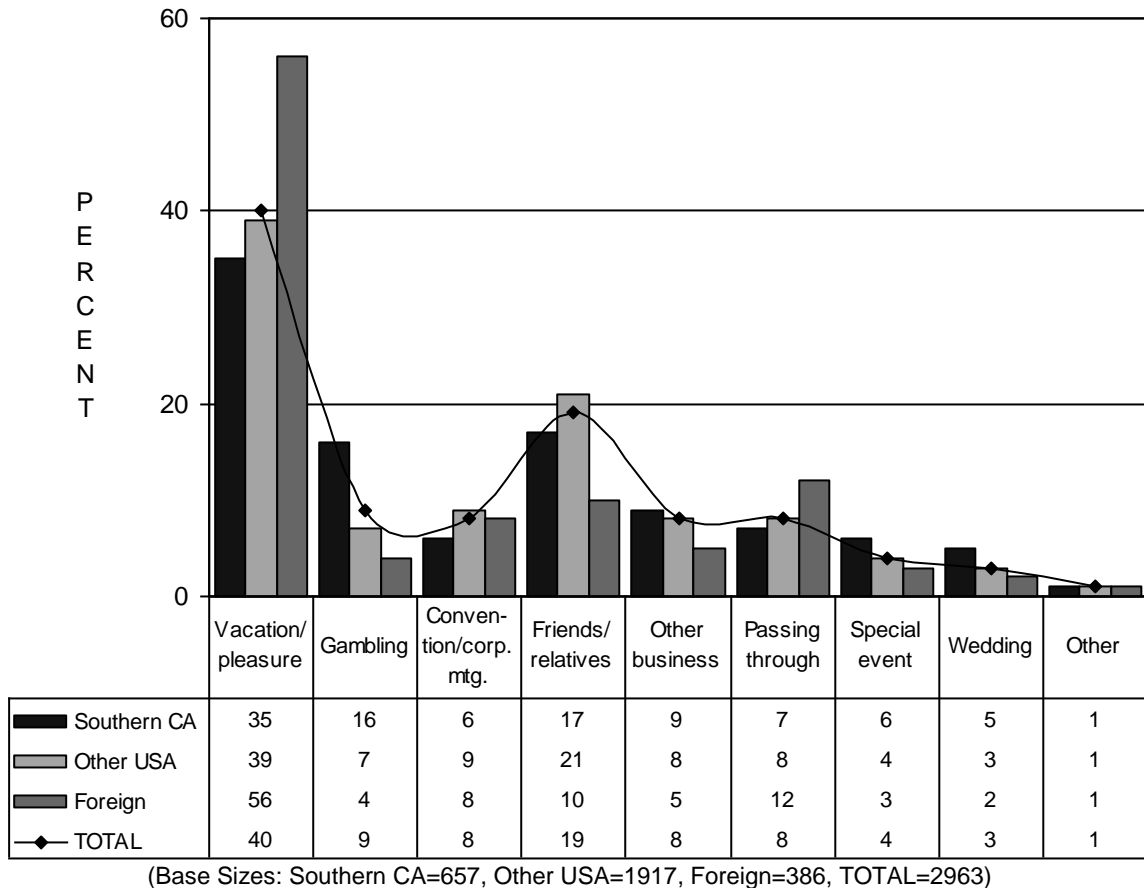
Looking at the frequency of visits in the past year among returning visitors, 47% of Southern California visitors visited Las Vegas more than once, compared to 29% of other domestic visitors and 9% of foreign visitors. As a result, the average number of visits during the past year was highest for repeat Southern California visitors (1.9 visits) and lowest for foreign visitors (1.1 visits).

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



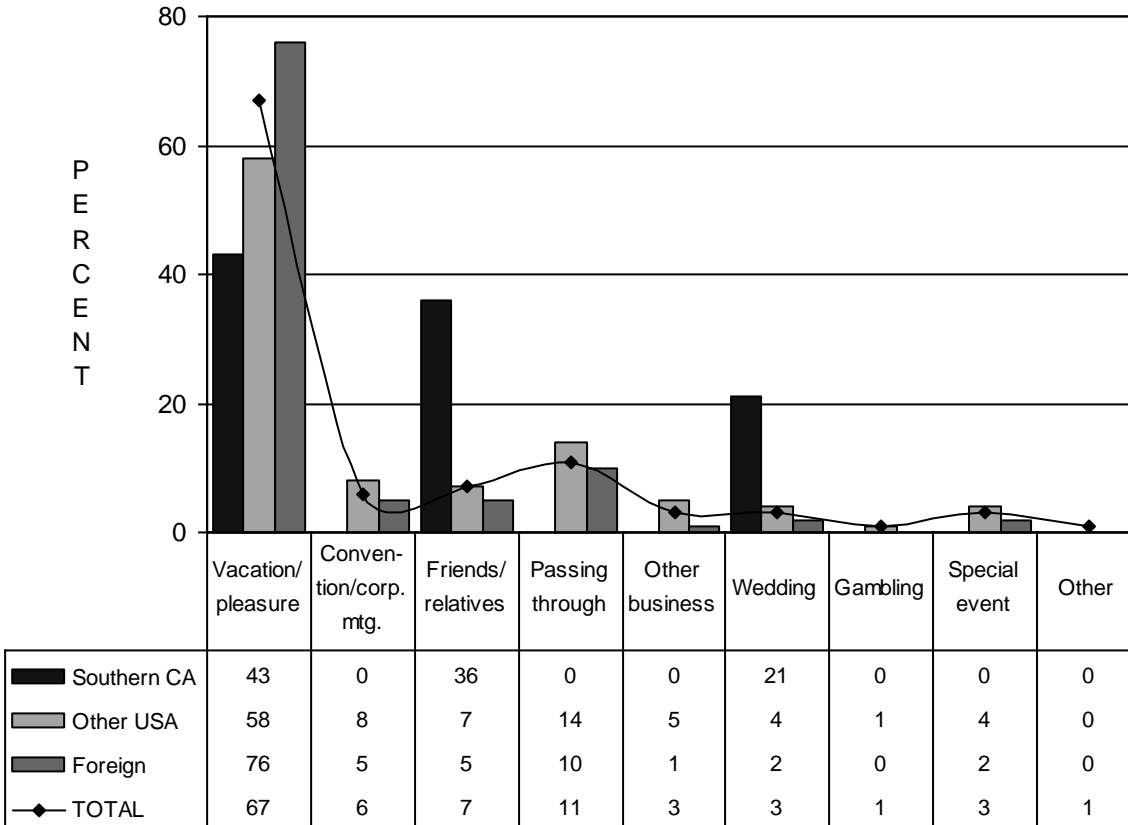
Looking at the primary purpose of the current visit among all visitors, foreign visitors (65%) were the most likely to say they were visiting Las Vegas for vacation or pleasure, followed by other domestic visitors (41%), and Southern California visitors (35%). Southern California (17%) and other Domestic visitors (19%) were more likely to say they traveled to Las Vegas primarily to visit friends and relatives than foreign visitors (7%). Southern California visitors (16%) were more likely than all other visitors to say they traveled to Las Vegas to gamble, while foreign visitors (2%) were the least likely to say they were visiting to gamble.

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



Looking at repeat visitors' primary purpose for their current visit, foreign visitors (56%) were more likely than all other visitors to say they came to Las Vegas primarily for vacation or pleasure. Southern California (17%) and other domestic visitors (21%) were more likely than foreign visitors (10%) to say they were visiting friends and relatives or for other business purposes (9% and 8% vs. 5% respectively). Foreign visitors (12%) were more likely than both Southern California (7%) and other domestic (8%) visitors to say they were just passing through.

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

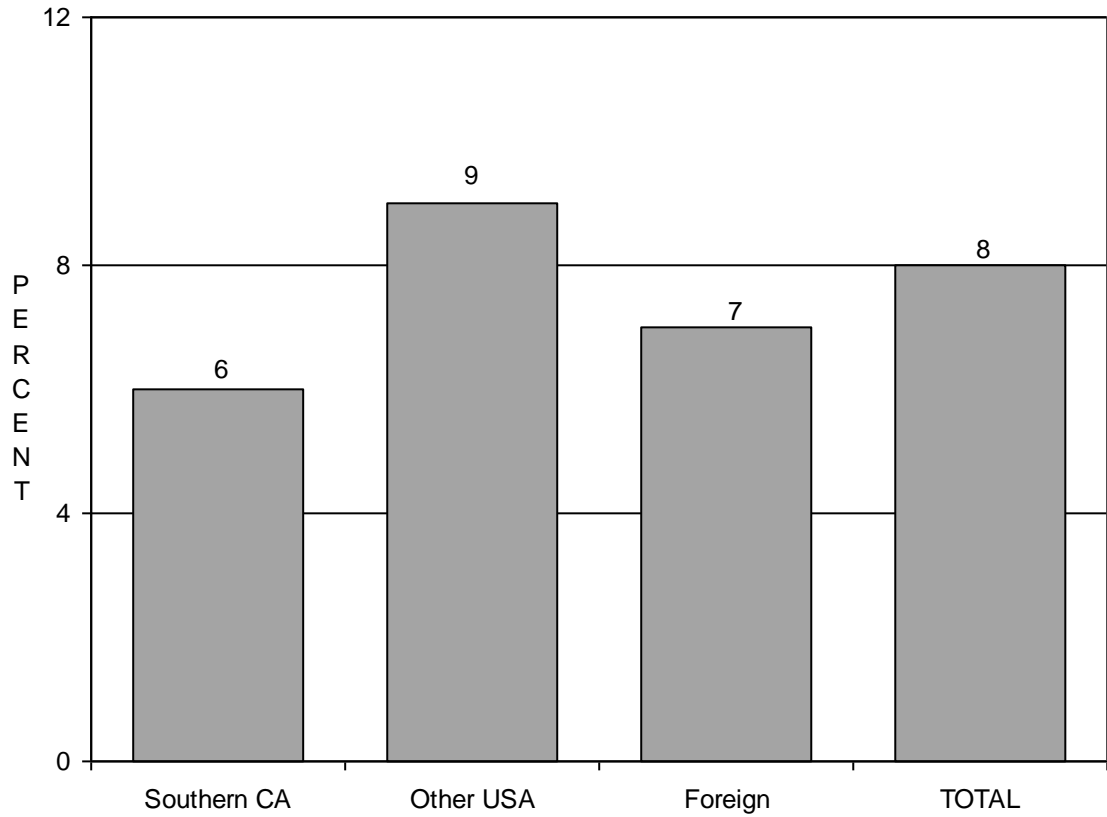


(Base Sizes: Southern CA=15*, Other USA=277, Foreign=341, TOTAL=636)

We also looked at what first-time visitors to Las Vegas said was the purpose of their current visit. Foreign visitors (76%) were more likely to say they came to Las Vegas for vacation or pleasure than other domestic visitors (58%). Other domestic visitors (5%) were more likely than foreign visitors (1%) to say the primary purpose for their current visit was for business purposes other than a convention or corporate meeting.

* Note extremely small base size for Southern California visitors.

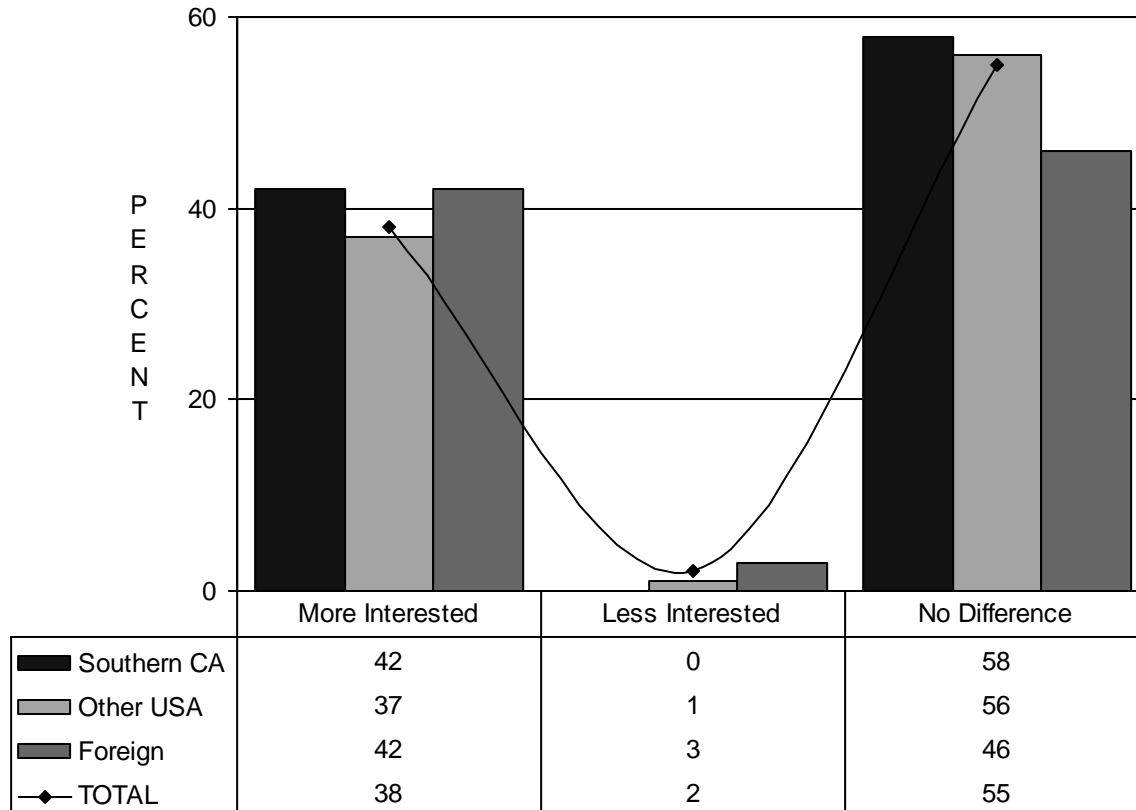
FIGURE 7
Conventions/Trade Shows/Associations/Corporate Meetings



Only "yes" responses are reported in this figure.

Visitors were asked if they had participated in or attended a convention, trade show, association or corporate meeting while in Las Vegas. Eight percent (8%) said they had, with other domestic visitors (9%) more likely to have done so than Southern California (6%) or foreign visitors (7%).

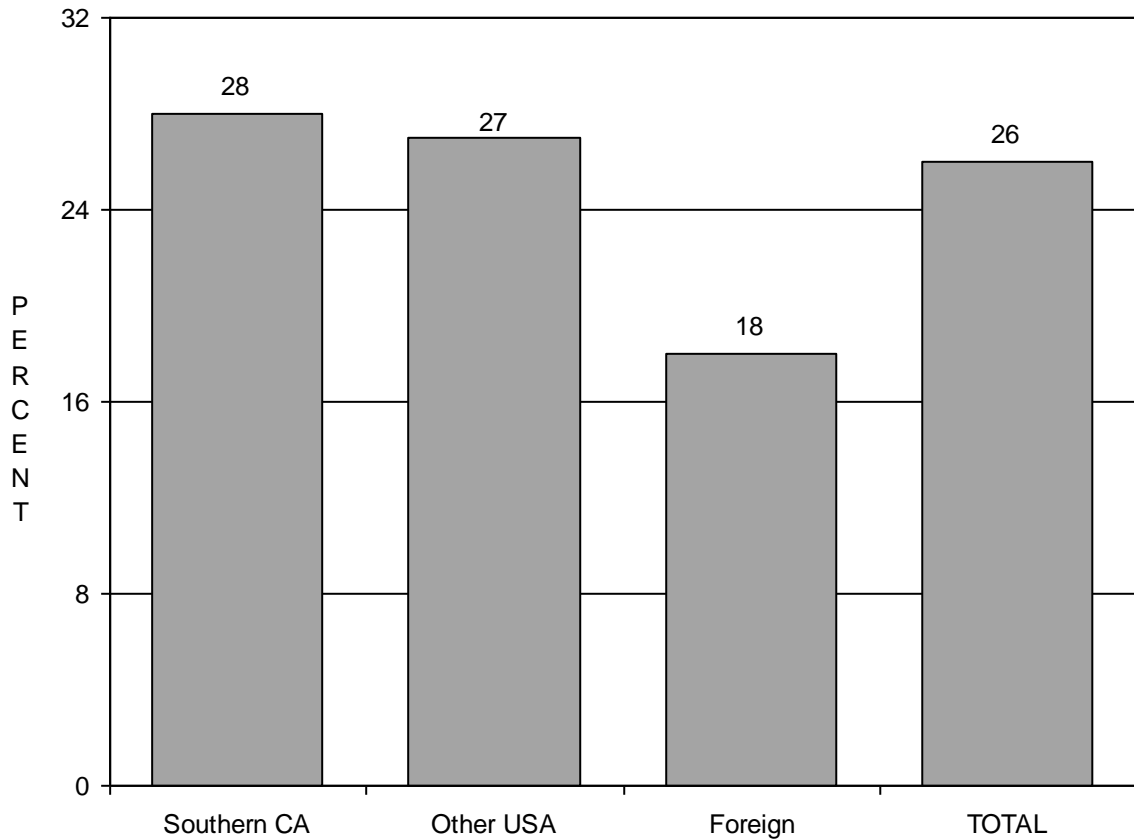
FIGURE 8
Interest In Attending Conventions, Trade Shows, Associations Or
Corporate Meetings In Las Vegas
(Among Visitors Who Attended A Convention,
Trade Show, Association Or Corporate Meeting)



(Base Sizes: Southern CA=38, Other USA=207, Foreign=48, TOTAL=295)

Convention visitors were asked if holding a convention, trade show, association or corporate meeting in Las Vegas made them more or less interested in attending — or if it made no difference. Overall, 38% of visitors said they would be more interested in attending if it was held in Las Vegas and 55% said it would make no difference. There were no statistically significant differences among the subgroups on these measures.

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



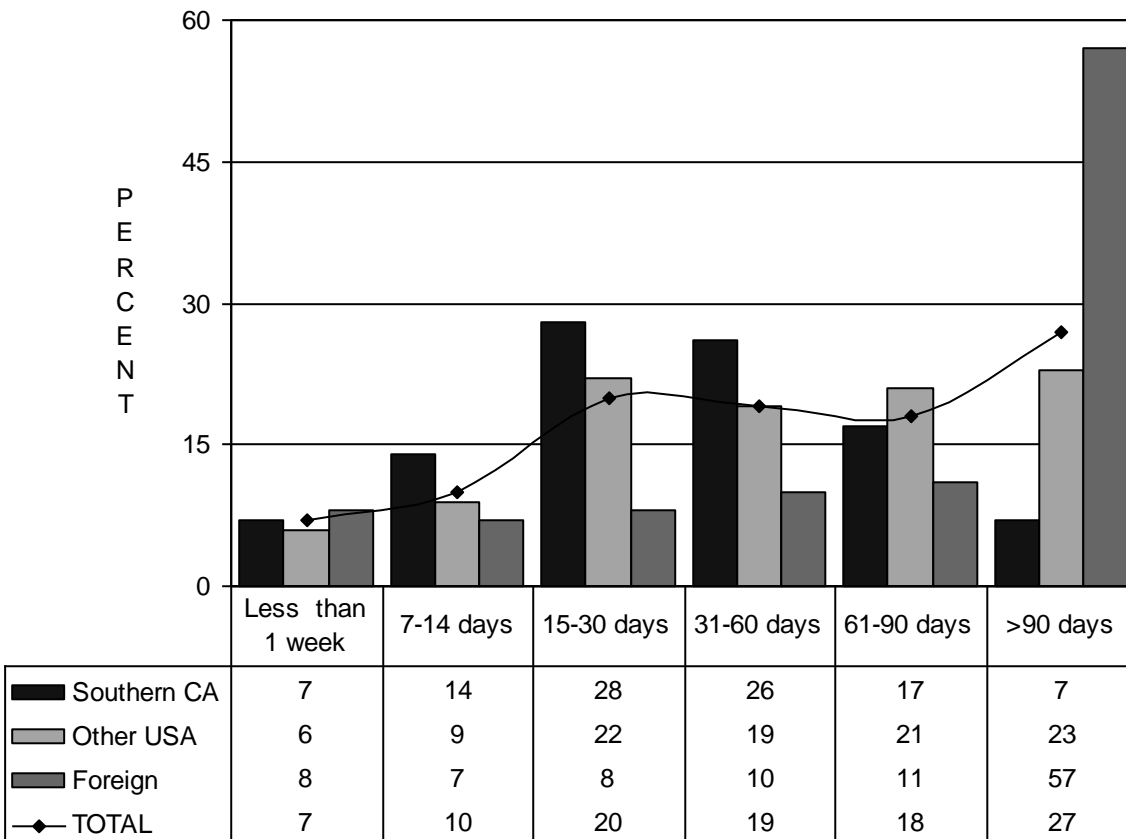
(Base Sizes: Southern CA=38, Other USA=207, Foreign=48, TOTAL=295)

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, association or corporate meeting with them. Twenty-six percent (26%) of convention visitors said they had. There were no statistically significant differences among the geographic subgroups.

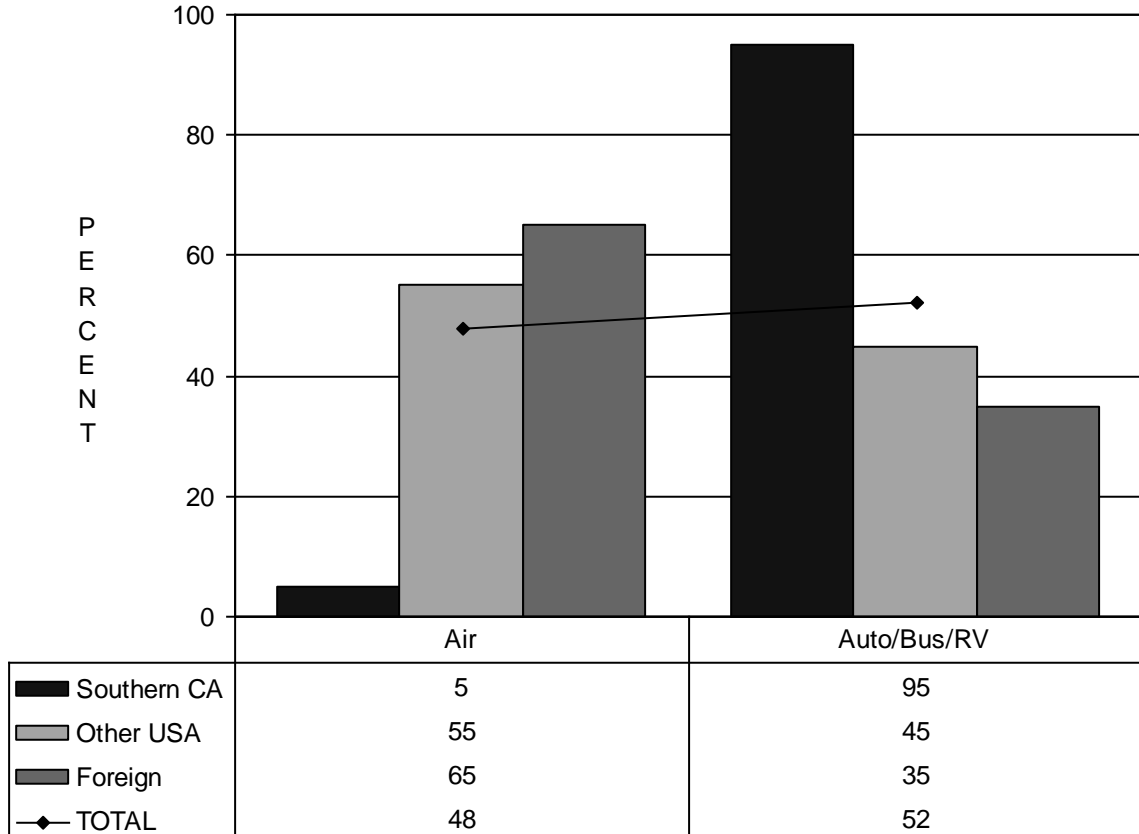
TRAVEL PLANNING

FIGURE 10
Advance Travel Planning



Foreign visitors tended to plan their trips the farthest in advance, followed by other domestic visitors, while Southern California visitors tended to have the shortest advance planning time. For example, 57% of foreign visitors planned their trip to Las Vegas more than 90 days in advance, compared to 23% of other domestic visitors 7% of Southern California visitors. Conversely, over four in ten (42%) visitors from Southern California planned their trip one week to one month ahead of time, compared to 31% of other domestic visitors and only 15% of foreign visitors.

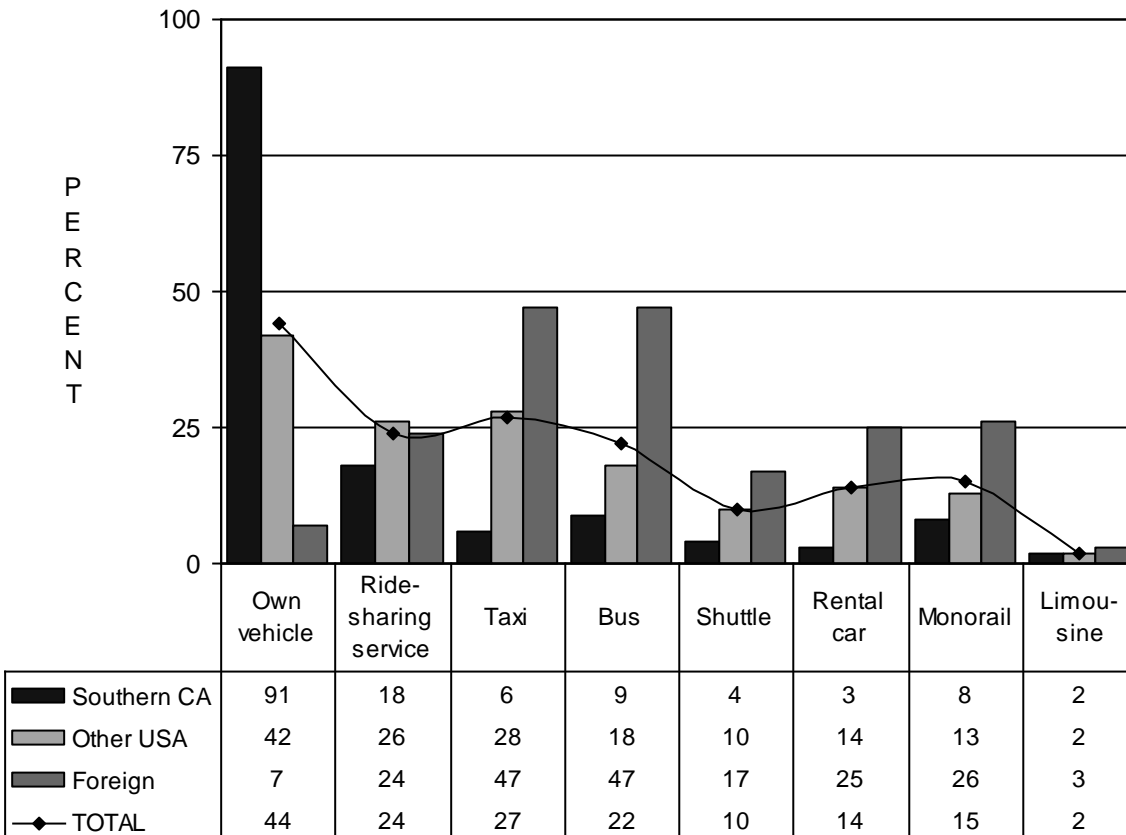
FIGURE 11
Transportation To Las Vegas



Southern California visitors (5%) were significantly less likely to have traveled to Las Vegas by air than both foreign visitors (65%) and other domestic visitors (55%).

Southern California visitors (95%) were much more likely to have taken ground transportation to Las Vegas than other domestic visitors (45%), with foreign visitors (35%) the least likely to have done so.

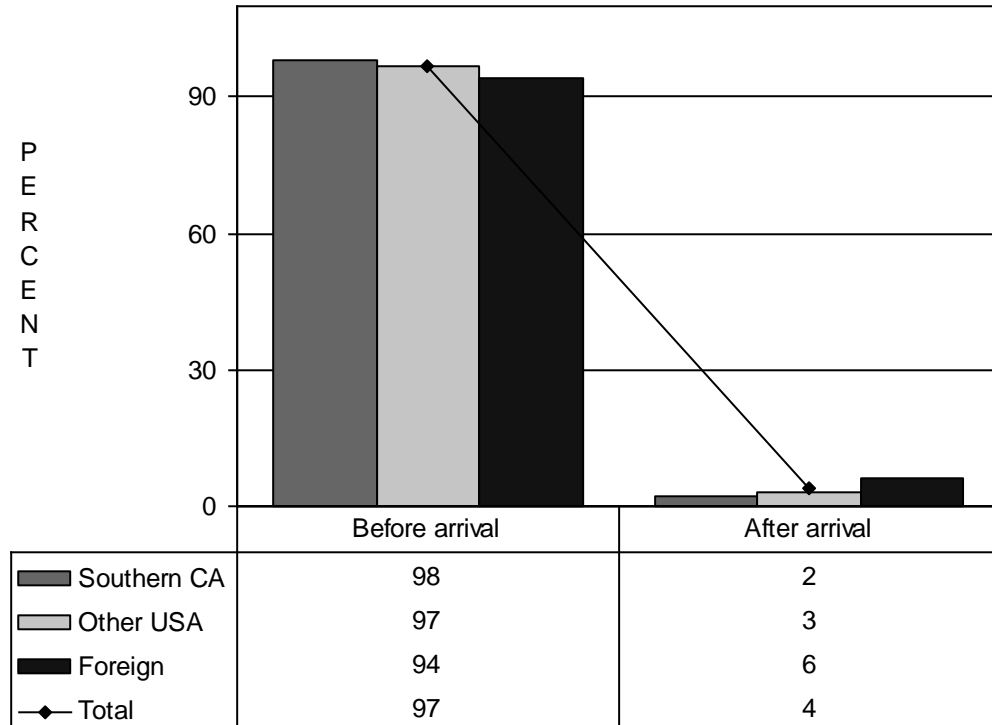
FIGURE 12
Local Transportation



Multiple responses permitted

Visitors were asked what types of local transportation they had used while in Las Vegas. Southern California visitors were the most likely to have used their own vehicles (91%) and were the least likely to have used all other transportation methods. Other domestic visitors (42%) were also more likely to have used their own vehicle than foreign visitors (7%). Foreign visitors were the most likely visitor segment to have taken a taxi (47%), used a local bus (47%), used a rental car (25%), used a hotel shuttle (17%), or taken the Monorail (26%). Other domestic visitors (26%) and foreign visitors (24%) were more likely than Southern California visitors (18%) to say that they had used a ride-sharing service.

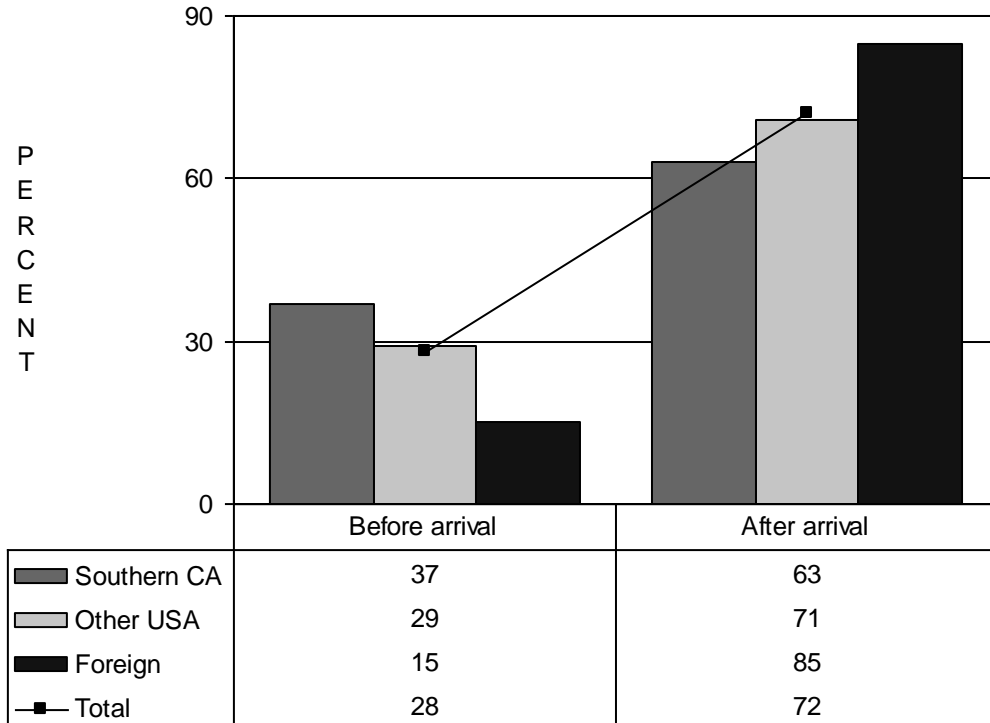
FIGURE 13
When Decided Where To Stay
(Among Those Who Stayed Overnight)



(Base Sizes: Southern CA=672, Other USA=2182, Foreign=726, TOTAL=3584)

Almost all visitors (97%) decided where to stay before arriving in Las Vegas. However, foreign visitors (6%) were more likely than other domestic visitors (3%) and Southern California visitors (2%) to say they decided where to stay after they arrived.

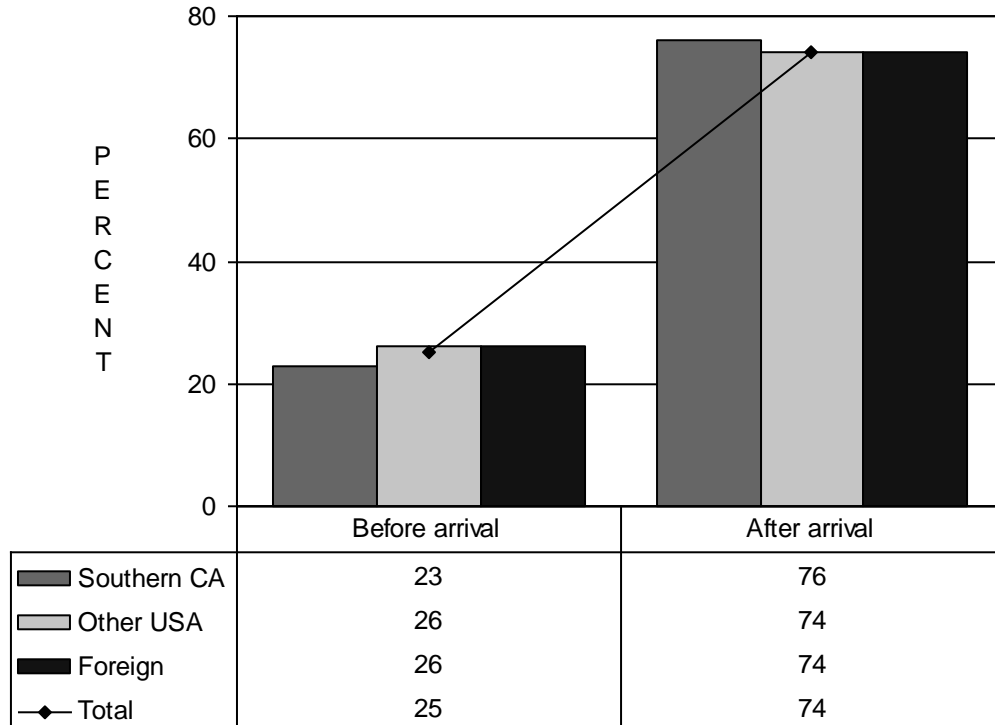
FIGURE 14
When Decided Where To Gamble
(Among Those Who Gambled)



(Base Sizes: Southern CA=504, Other USA=1621, Foreign=551, TOTAL=2679)

Among those visitors who gambled while in Las Vegas, Southern California visitors (37%) were significantly more likely than all others — and other domestic visitors (29%) were more likely than foreign visitors (15%) — to say they decided where to gamble before arriving in Las Vegas.

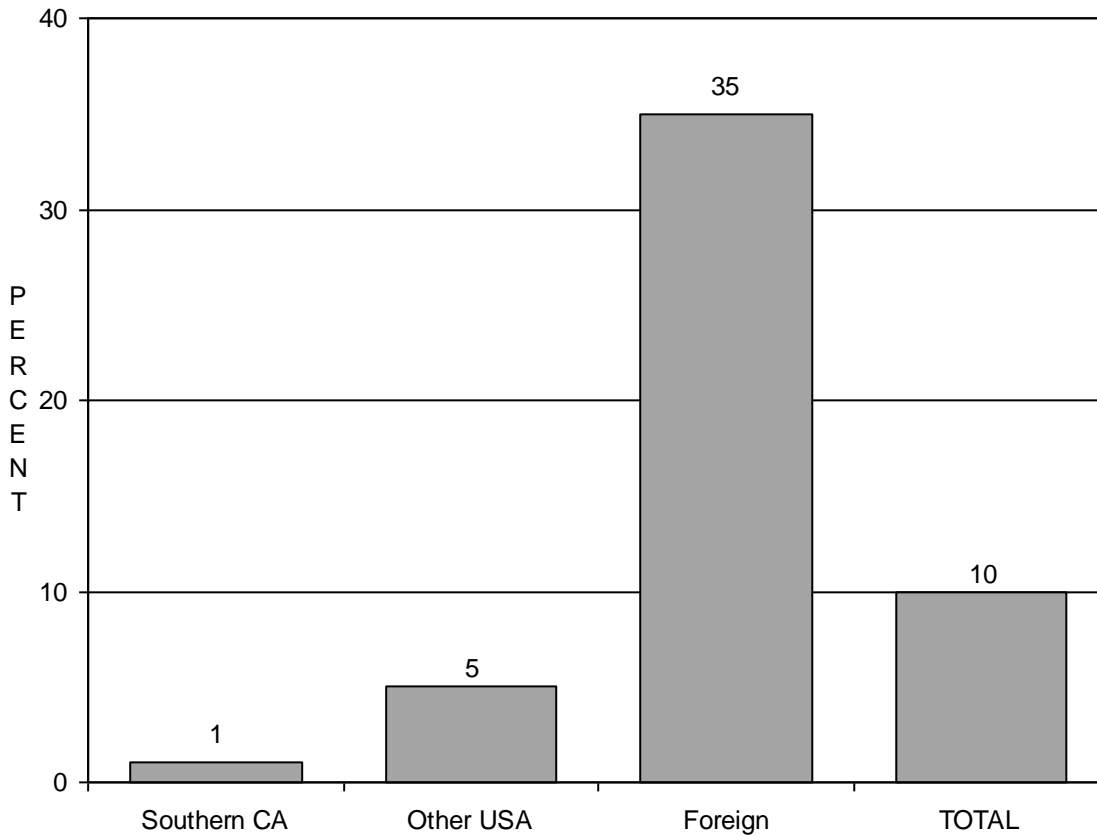
FIGURE 15
 When Decided Which Shows To See
 (Among Those Who Saw Shows)



(Base Sizes: Southern CA=347, Other USA=1237, Foreign=508, TOTAL=2096)

One quarter (25%) of those visitors who saw shows in Las Vegas said they decided which shows to see before their arrival, while three quarters (74%) decided after they arrived. There were no differences between the visitor segments on this measure.

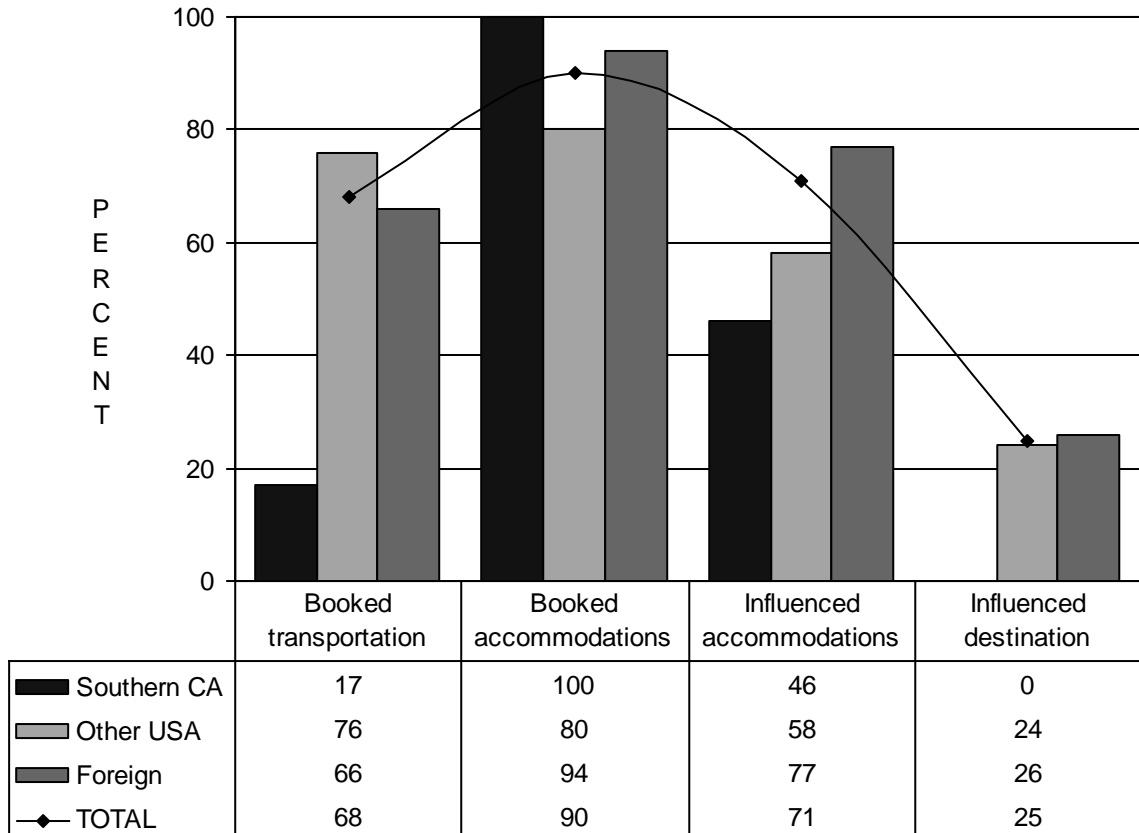
FIGURE 16
Travel Agent Assistance



Only "yes" responses are reported in this figure.

Overall, 10% of visitors used the services of a travel agent in planning their trip. Foreign visitors (35%) were far more likely to have used a travel agent than other domestic visitors (5%), who in turn were more likely to have used a travel agent than visitors from Southern California (1%).

FIGURE 17
Travel Agent Influence And Use
(Among Those Who Used A Travel Agent)

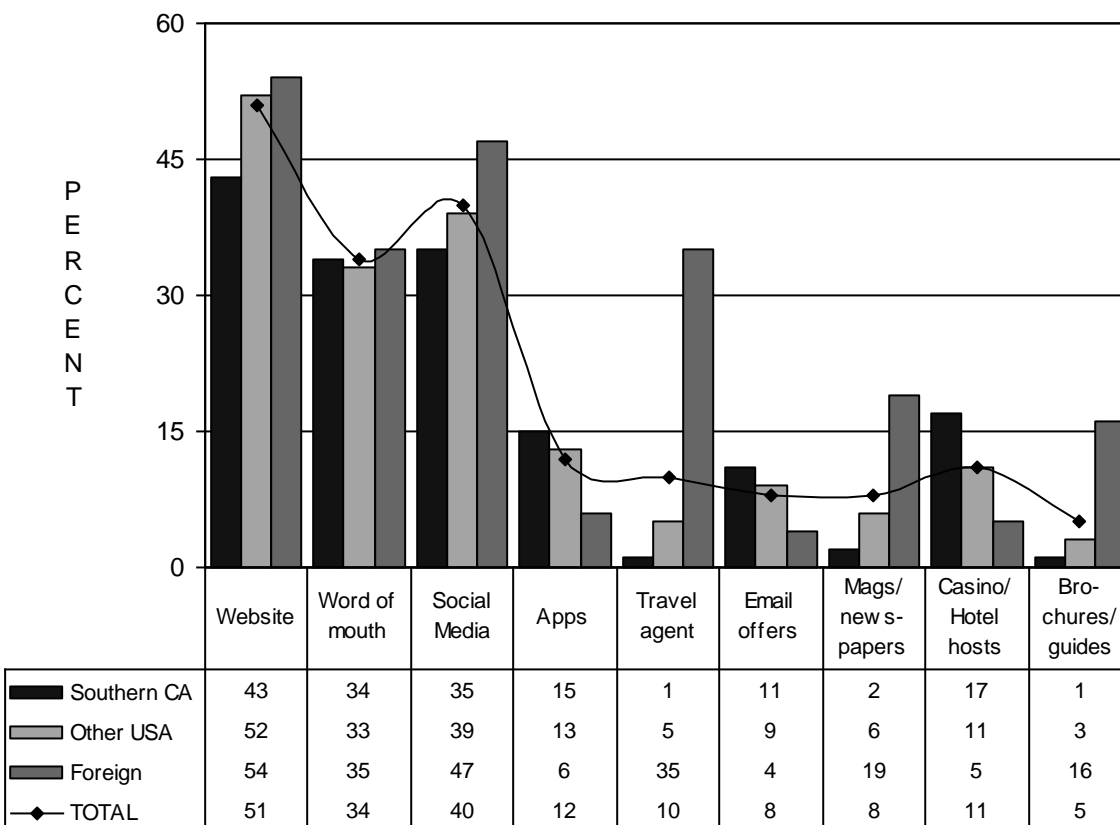


Multiple responses permitted
Caution small sample sizes
(Base Sizes: Southern CA=4*, Other USA=102, Foreign=258, TOTAL=364)

Among those visitors who used a travel agent to plan their trip to Las Vegas, nearly seven in ten (68%) said the travel agent booked their transportation, while nine in ten (90%) said the agent booked their accommodations and seven in ten (71%) said the travel agent influenced their choice of accommodations. Foreign visitors were more likely than other domestic visitors to say the travel agent influenced their choice of accommodations (77% vs. 58%) and booked their accommodations (94% vs. 80%).

* Note extremely small base size for Southern California visitors.

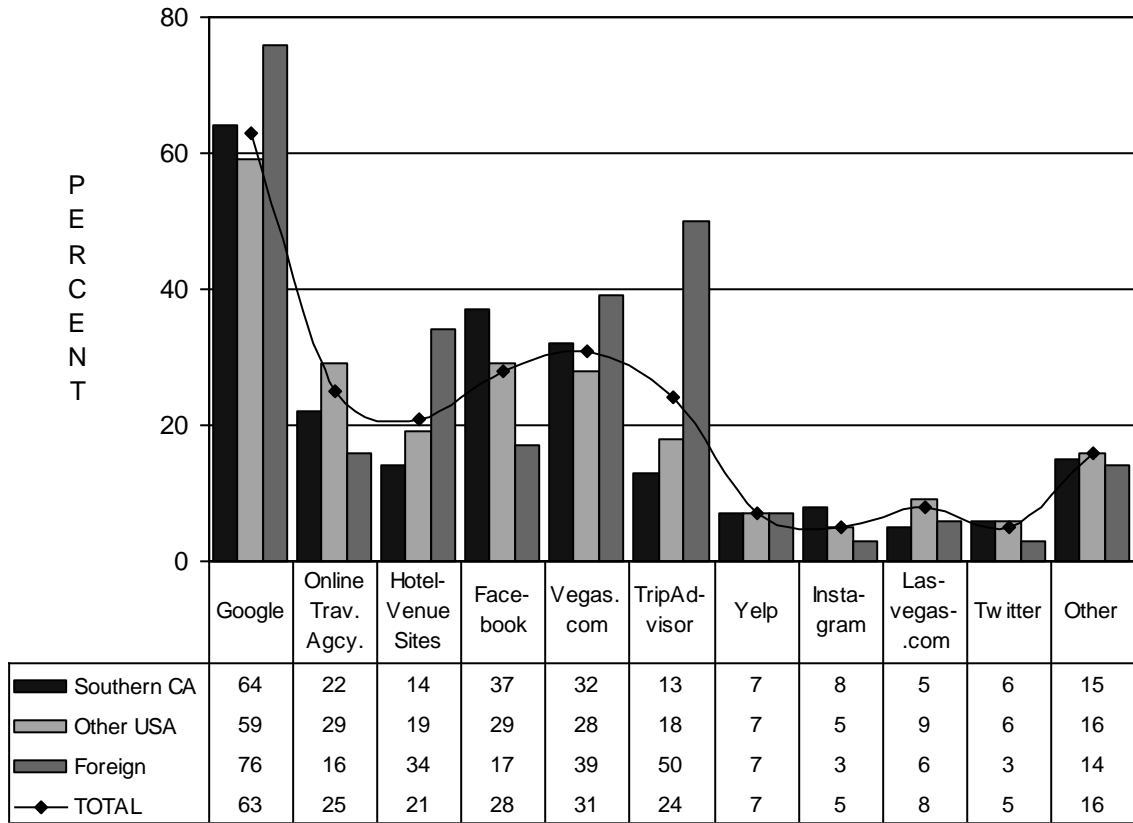
FIGURE 18
Tools Used In Planning Trip To Las Vegas



Multiple responses permitted

Visitors were asked what tools they used to plan their trip to Las Vegas. About six in ten 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. Other domestic visitors (52%) and foreign visitors (54%) were more likely than Southern California visitors (43%) to say they had used a website in planning their trip, while Southern California visitors (15%) and other domestic visitors (13%) were more likely than foreign visitors (6%) to use apps. Southern California visitors (17%) were the most likely segment to say they used casino/hotel hosts, while foreign visitors (5%) were the least likely to do so. Foreign visitors were the most likely segment to say they used social media (47%), a travel agent (35%), magazines or newspapers (19%), or printed brochures or travel guides (16%) in planning their trip to Las Vegas.

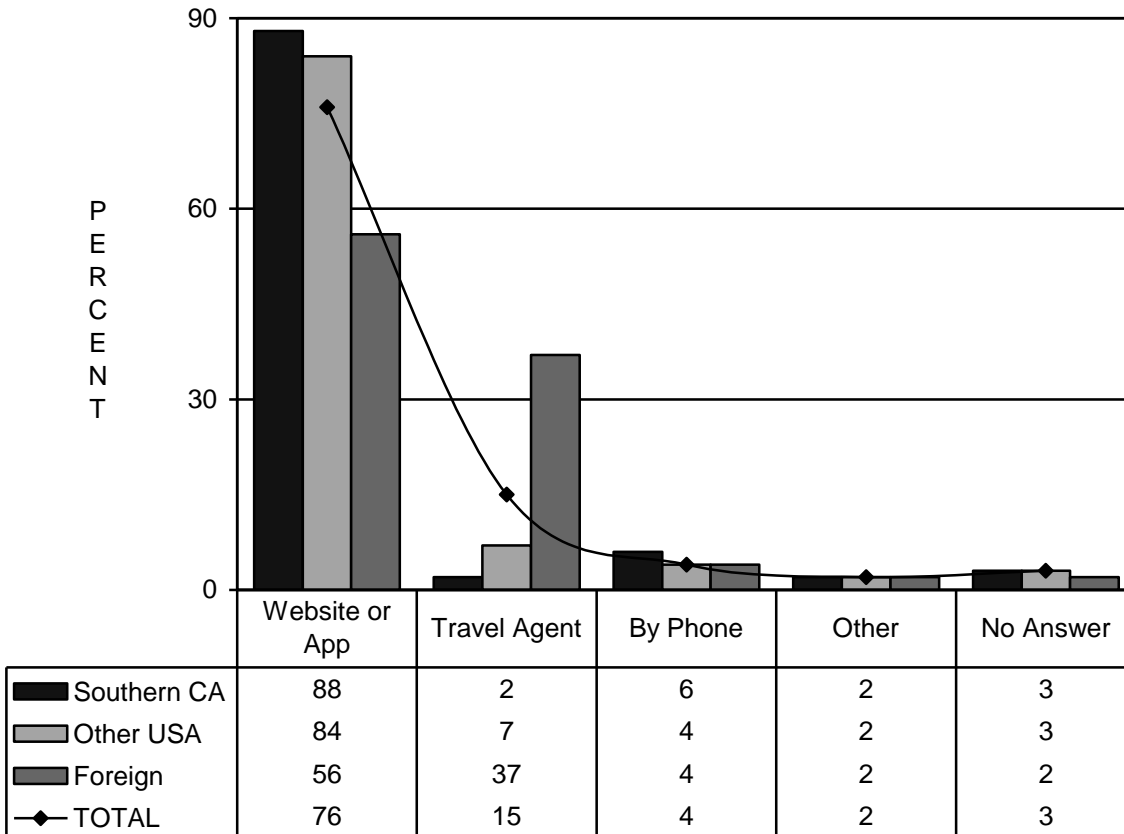
FIGURE 19
Social Media And Travel Review Apps Used In Planning Trip To Las Vegas
(Among Those Who Used Websites, Social Media, Or Apps To Plan Trip)



Multiple responses permitted
(Base Sizes: Southern CA=350, Other USA=1318, Foreign=426, TOTAL=2097)

Visitors who said they used a website, social media, or apps in planning their trip (six in ten of all visitors) were asked which social media or travel review apps they used. Over six in ten (63%) visitors said they used Google, while about three in ten (31%) said they used Vegas.com or Facebook (28%). Foreign visitors were the most likely segment to use Google (76%), Trip Advisor (50%), and to have consulted reviews at hotel or show venue sites (34%). Southern California visitors were the most likely segment to say they used Facebook (37%), and other domestic visitors were the most likely segment to say they consulted reviews at online travel agencies (29%).

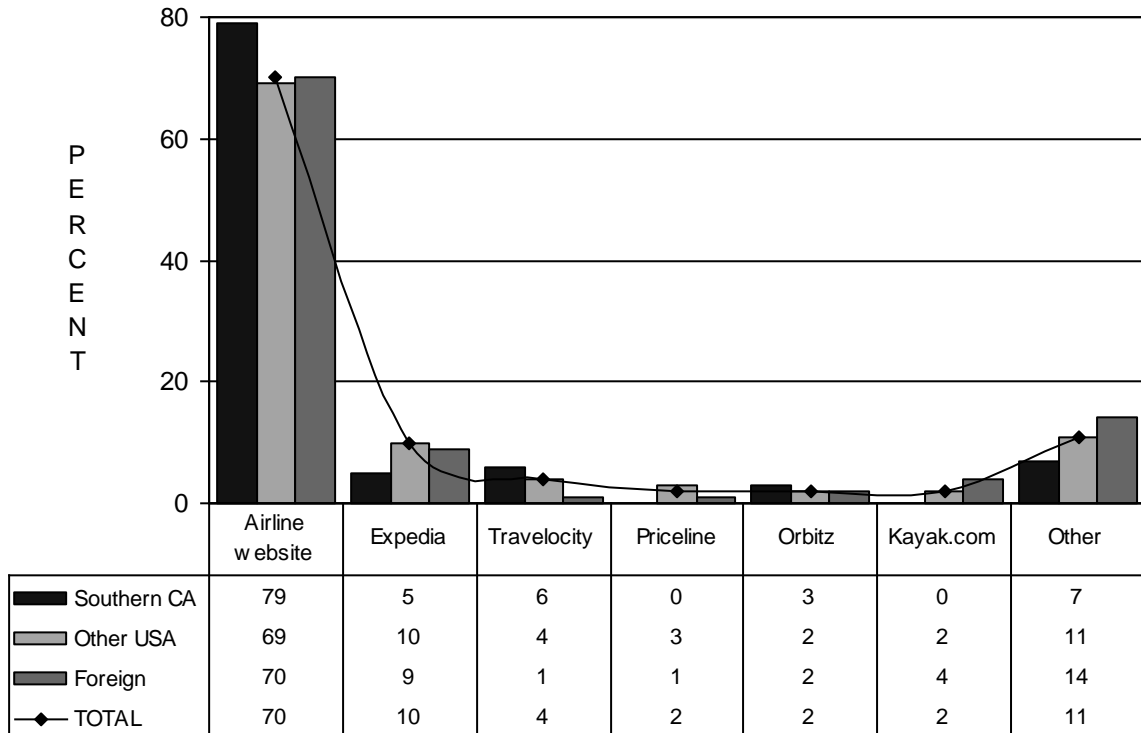
FIGURE 20
How Booked Flight To Las Vegas



(Base Sizes: Southern CA=32, Other USA=1206, Foreign=475, TOTAL=1714)

Visitors who arrived in Las Vegas by air were asked how they booked their flight. Three-quarters (76%) said they used a website or an app. Fifteen percent (15%) said they used a travel agent, and 4% said they booked their flight by phone. Southern California visitors (88%) and other domestic visitors (84%) were more likely than foreign visitors (56%) to say they booked their flight using a website or app. Foreign visitors (37%) were the most likely to say they used a travel agent to book their flight.

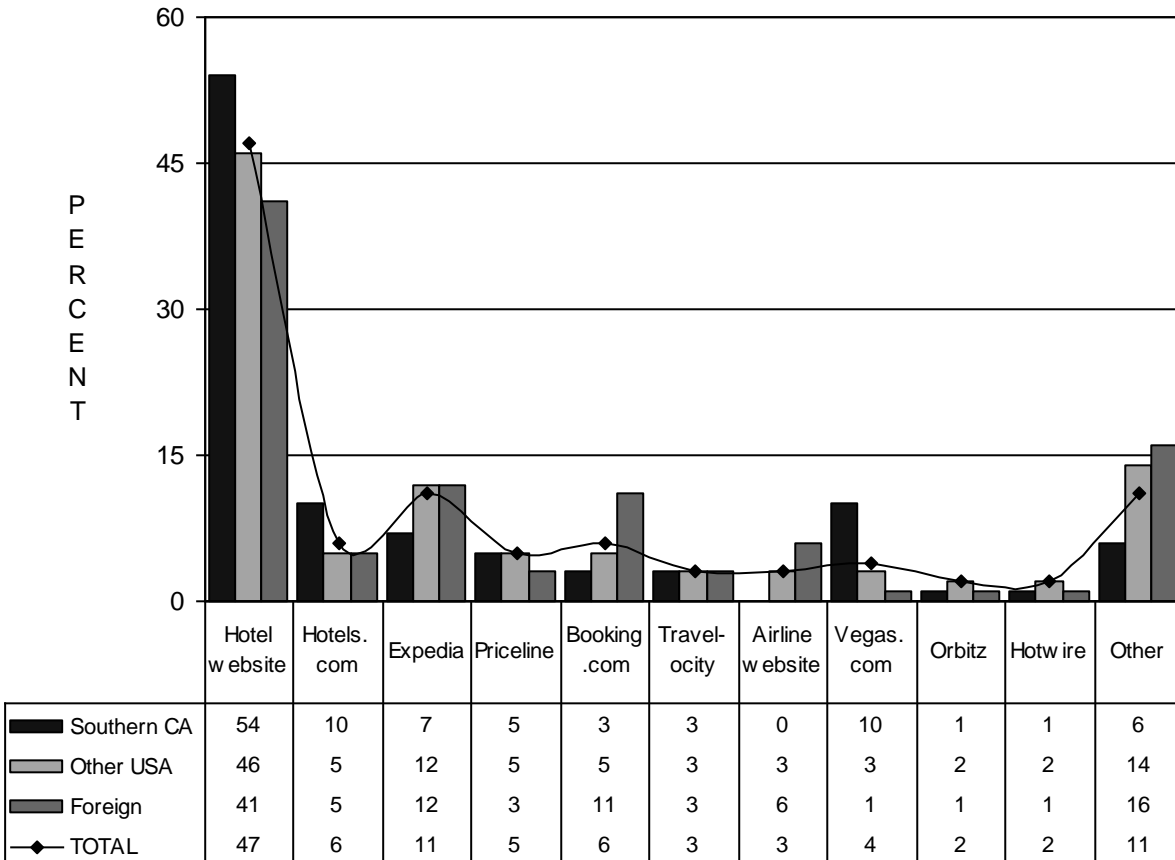
FIGURE 21
Website Used To Book Flight
(Among Those Who Booked Their Flight To Las Vegas Online)



(Base Sizes: Southern CA=28, Other USA=1014, Foreign=267, TOTAL=1309)

Among those 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. Other domestic visitors were more likely than foreign visitors to have used Travelocity or Priceline.

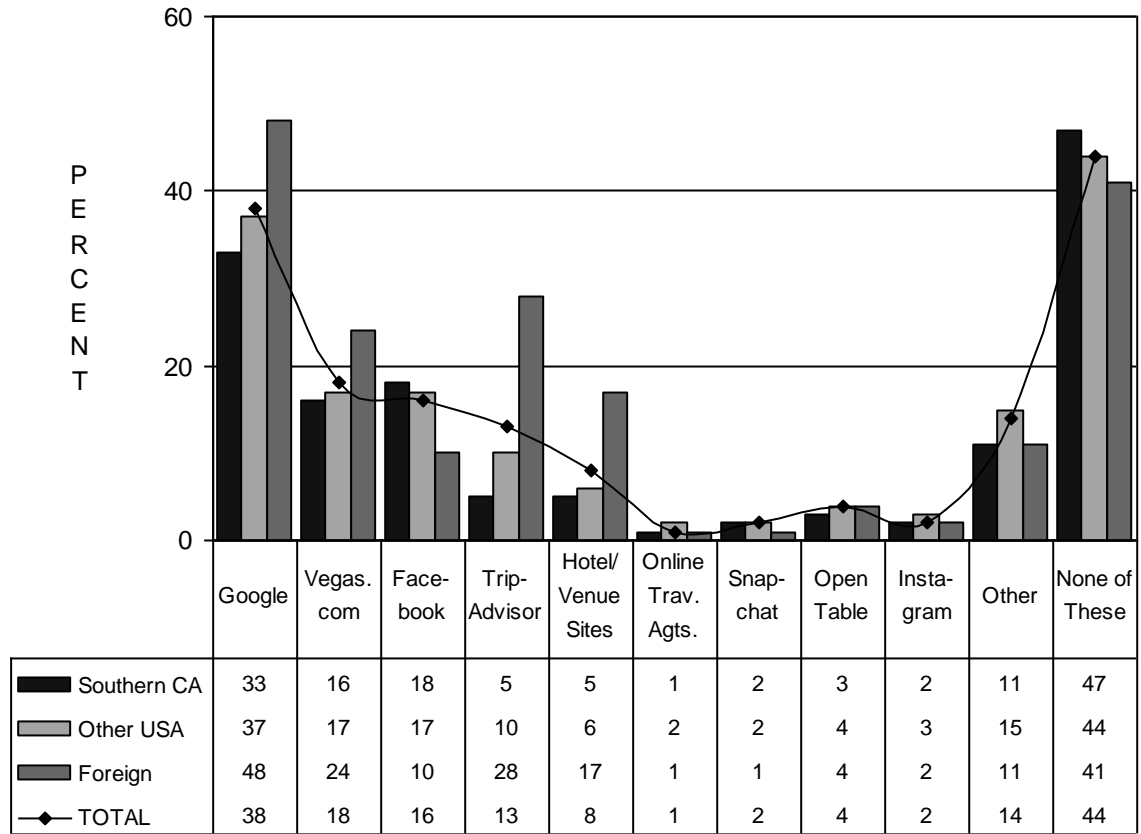
FIGURE 22
Website Used To Book Accommodations
(Among Those Who Booked Their Accommodations Online)



(Base Sizes: Southern CA=313, Other USA=1116, Foreign=304, TOTAL=1736)

Southern California visitors (10%) were the most likely segment to have used Vegas.com to book their accommodations, while foreign visitors were the most likely to have used Booking.com (11%) or an airline web site (6%). Southern California visitors were the most likely segment to have used Vegas.com.

FIGURE 23
Social Media And Travel Review Apps Used During Current Trip To Las Vegas

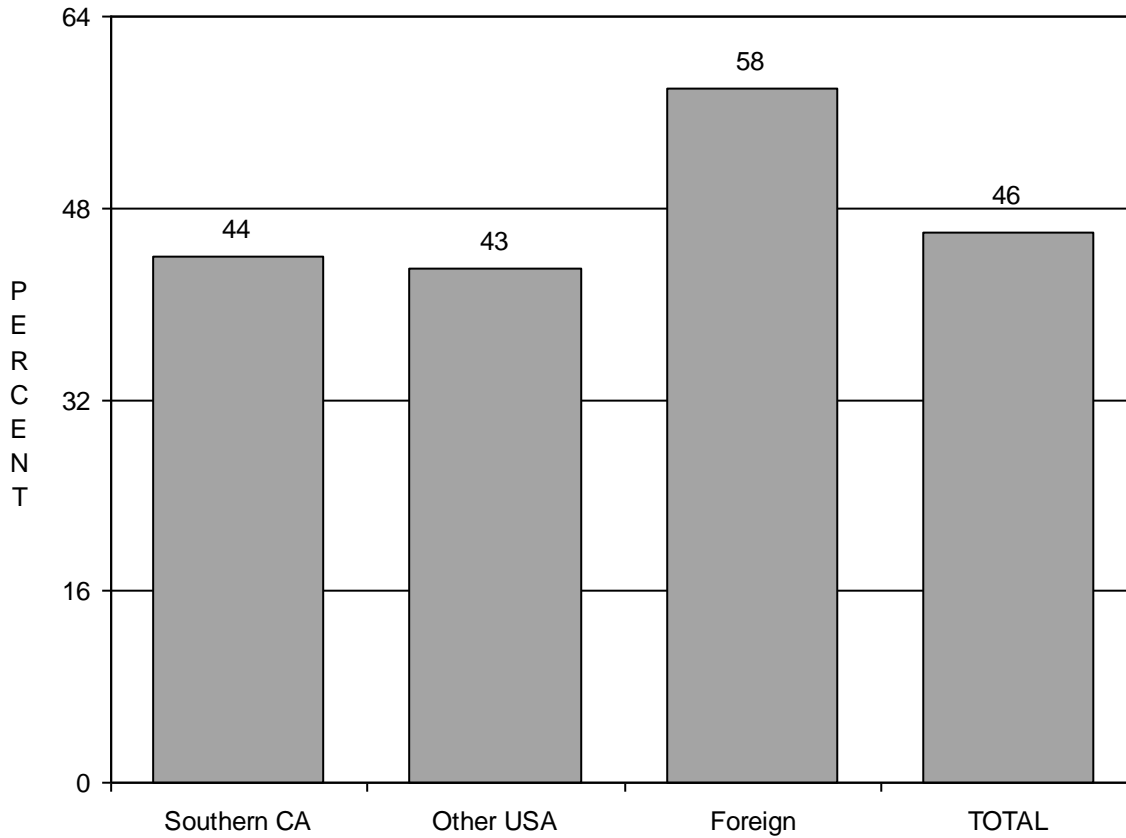


Multiple responses permitted

Visitors were asked whether they used social media apps or websites to plan their activities in Las Vegas and, if so, which ones. Over four in ten visitors (44%) said that they did not use social media apps or websites to plan their activities.

Foreign visitors were the most likely segment to have used a variety of social media apps and websites, including Google (48%), Vegas.com (24%), and TripAdvisor (28%), and to say they consulted reviews at hotel or show venue sites (17%). Other domestic visitors (17%) and Southern California visitors (18%) were more likely than foreign visitors (10%) to have used Facebook.

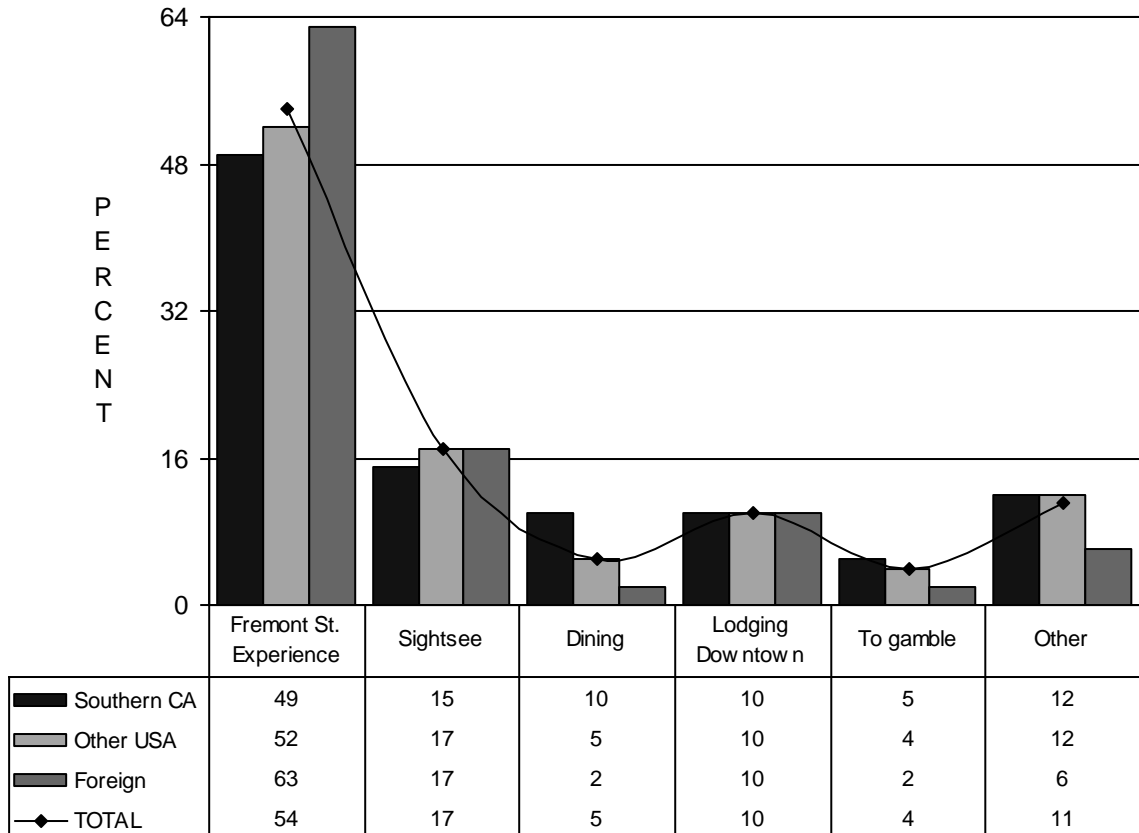
FIGURE 24
Whether Visited Downtown Las Vegas On This Trip



Only "yes" responses are reported in this figure.

Visitors were asked whether they had visited Downtown Las Vegas. In 2018, just under one-half (46%) of visitors said they had. Foreign visitors (58%) were more likely than both Southern California visitors (44%) and other domestic visitors (43%) to say they had visited Downtown Las Vegas.

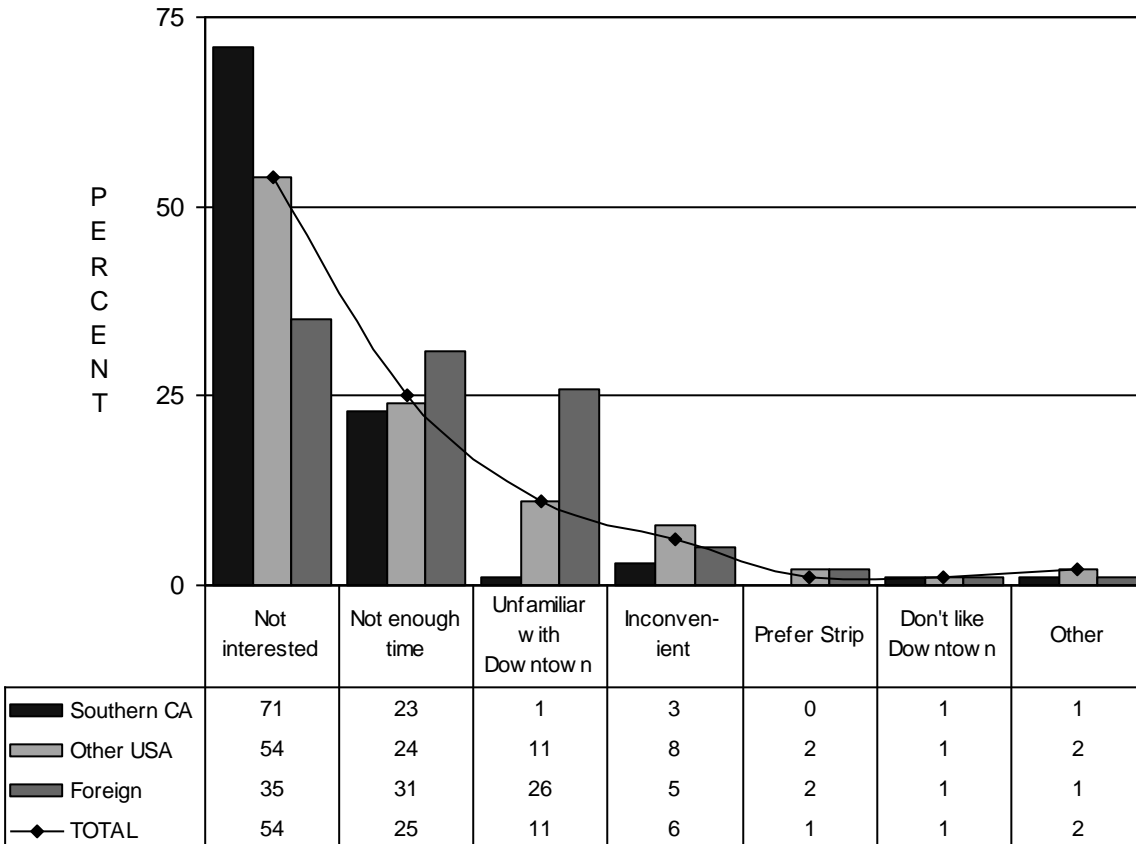
FIGURE 25
Main Reason For Visiting Downtown Las Vegas
(Among Those Who Visited Downtown)



(Base Sizes: Southern CA=298, Other USA=938, Foreign=424, TOTAL=1661)

People who visited Downtown Las Vegas on their current trip were asked the primary reason why they had done so. Foreign visitors (63%) were more likely than both other domestic visitors (52%) and Southern California visitors (49%), to say they visited Downtown primarily to see the Fremont Street Experience. Southern California visitors (10%) were more likely than other domestic visitors (5%), who were in turn more likely than foreign visitors (2%) to say they came Downtown to dine.

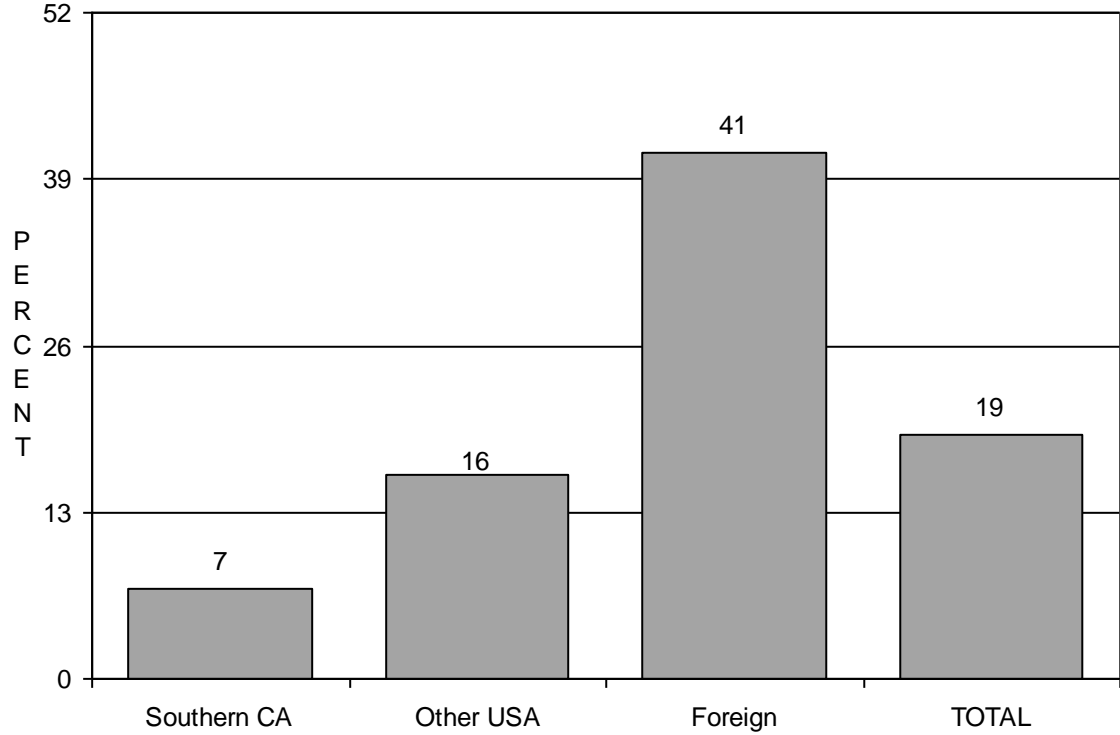
FIGURE 26
Main Reason For Not Visiting Downtown Las Vegas
(Among Those Who Did Not Visit Downtown)



(Base Sizes: Southern CA=375, Other USA=1254, Foreign=304, TOTAL=1937)

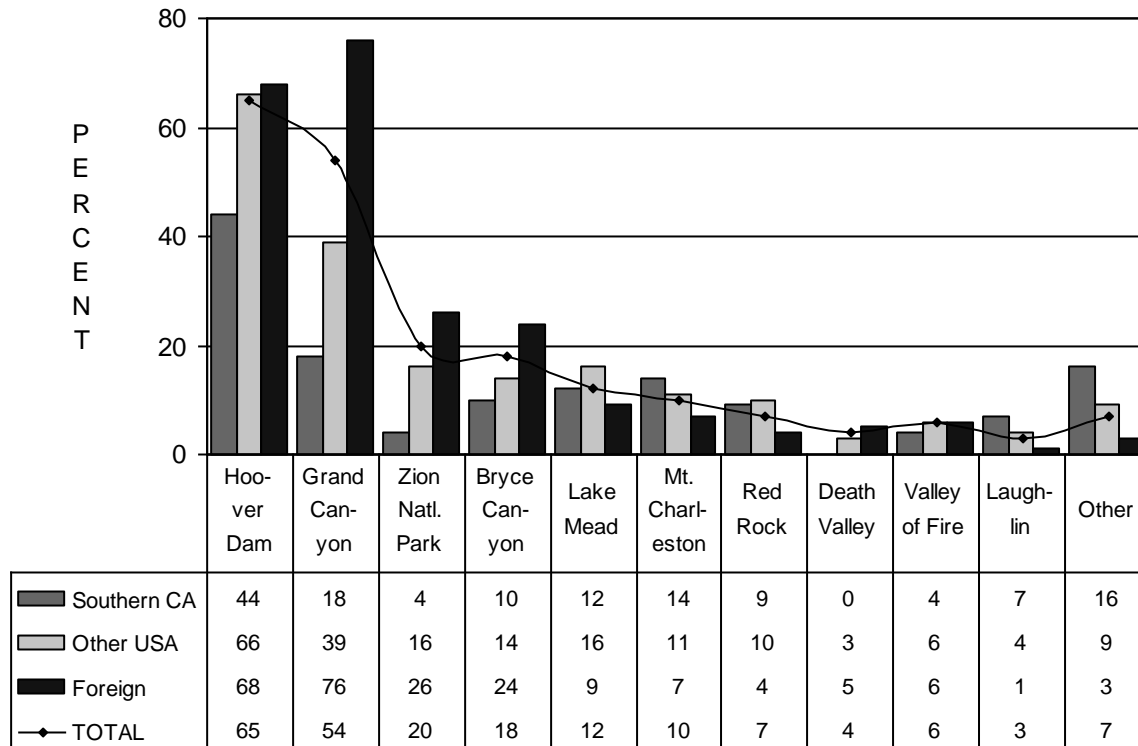
Visitors who did not visit Downtown were asked why they did not. Southern California visitors (71%) were the most likely segment to say they had no interest in visiting the Downtown area, followed by other domestic visitors (54%), who in turn were more likely than foreign visitors (35%) to give this response. Foreign visitors (26%) were the most likely to cite a lack of familiarity with the Downtown area, followed by domestic visitors from outside Southern California (11%), then Southern California visitors (1%).

FIGURE 27
Visits To Nearby Places



Visitors were asked if they visited nearby places. Foreign visitors (41%) were the most likely segment to visit nearby places, followed by other domestic visitors (16%), who in turn were more likely than Southern California visitors (7%) to visit nearby places.

FIGURE 28
Other Nearby Places Visited
(Among Those Who Visited Or Planned to Visit Other Places)

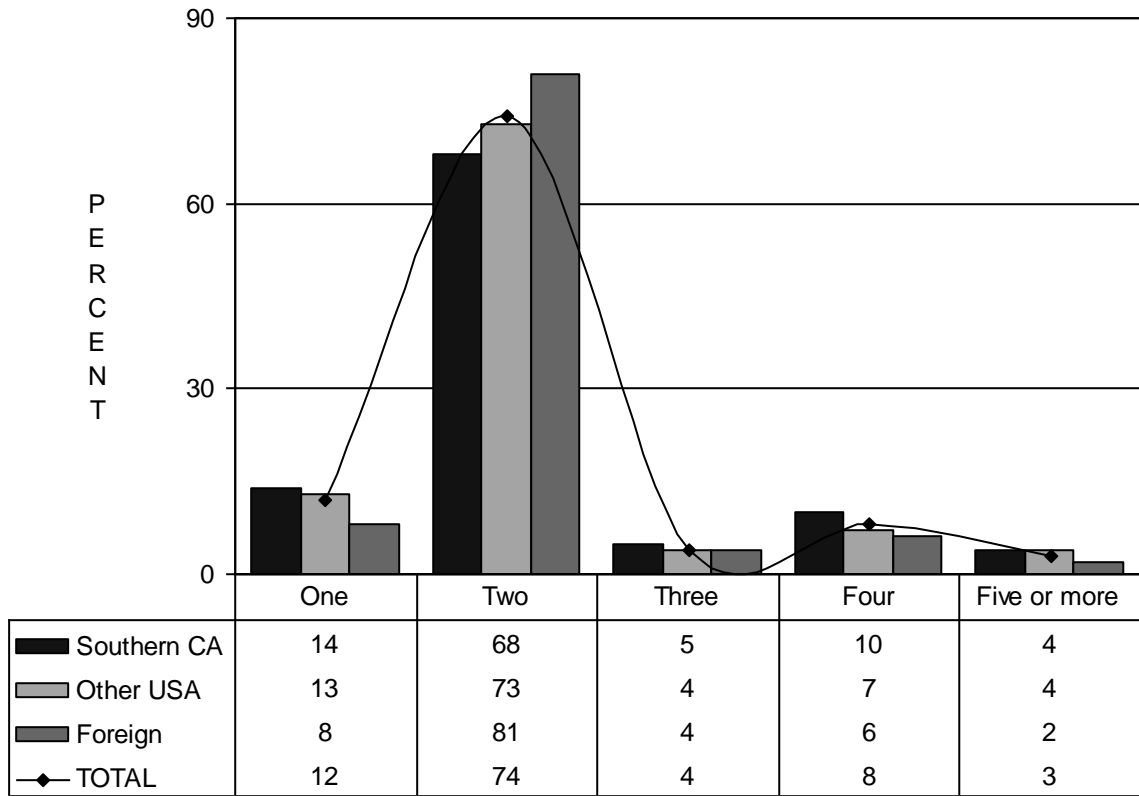


Multiple responses permitted.
(Base Sizes: Southern CA=48, Other USA=347, Foreign=298, TOTAL=694)

Among those people who visited nearby places, foreign visitors (87%) were the most likely segment to have visited several nearby places including the Grand Canyon (76%), Zion National Park (26%), and Bryce Canyon (24%). Other domestic visitors were more likely than foreign visitors to visit Lake Mead (16% vs. 9%), Red Rock (10% vs. 4%) and Laughlin (4% vs. 1%).

TRIP CHARACTERISTICS AND EXPENDITURES

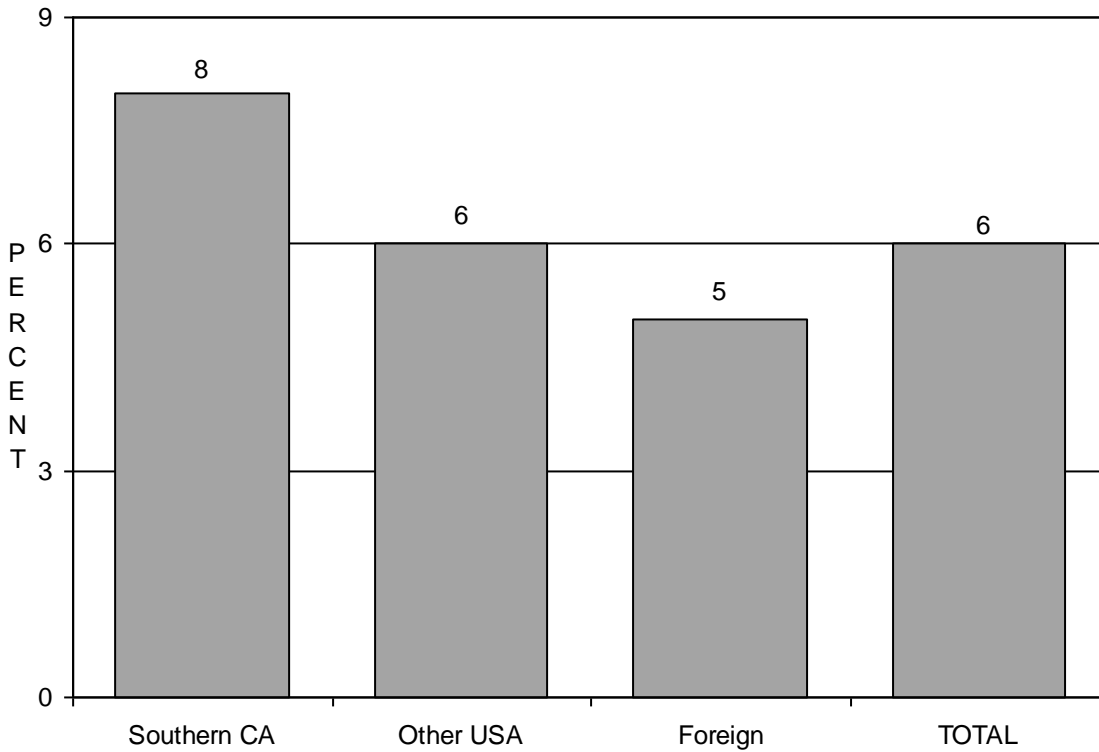
FIGURE 29
Adults In Immediate Party



(Means: Southern CA=2.3, Other USA=2.2, Foreign=2.2, TOTAL=2.2)

Three quarters (74%) of visitors traveled in parties of two and the average party size was 2.2. Foreign visitors (81%) were the most likely segment to be traveling in a party of two and the least likely segment to be traveling alone (8%). Other domestic visitors (4%) were more likely than foreign visitors (2%) to say they were traveling in a party of five or more.

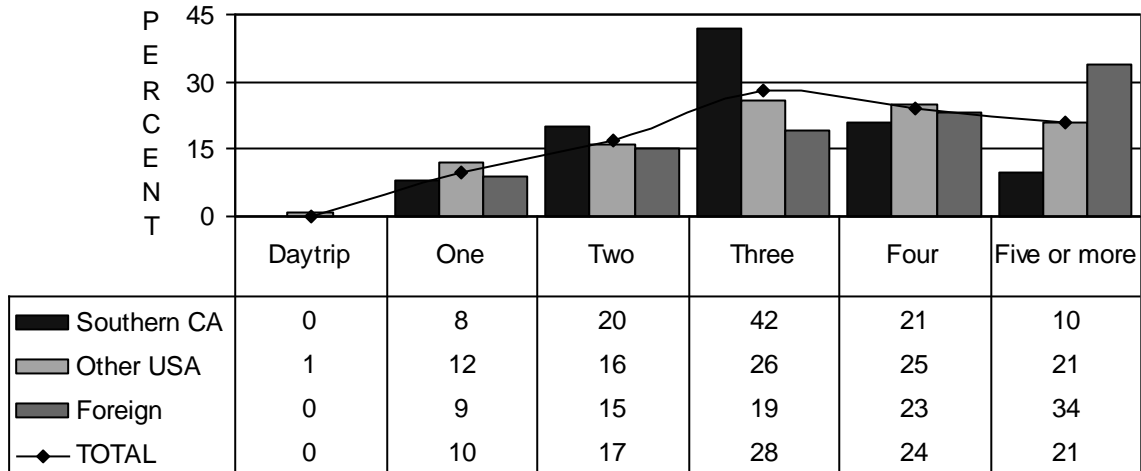
FIGURE 30
Whether Had Persons In Immediate Party Under Age 21
(Among All Visitors)



Only "yes" responses are reported in this figure.

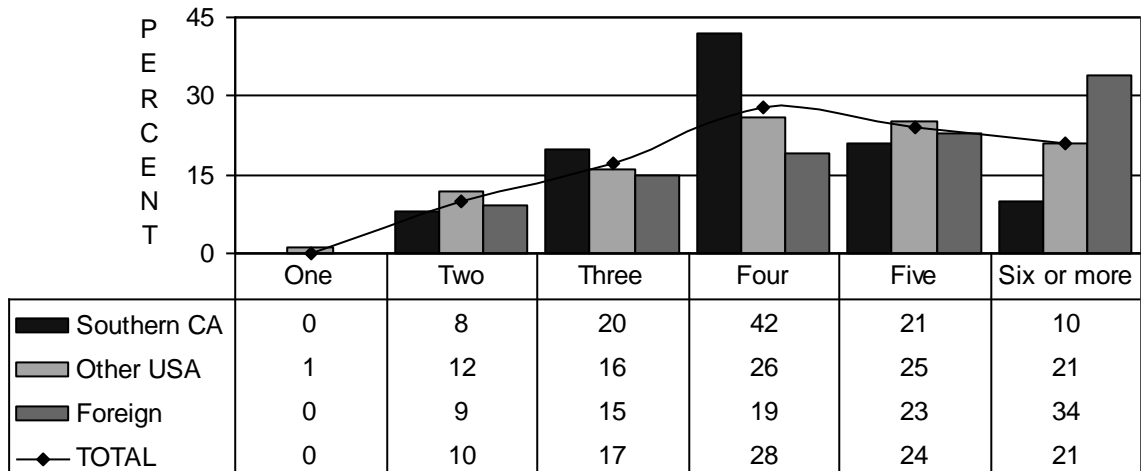
Six percent (6%) of all visitors said they were traveling with people under the age of 21 in their immediate party. There were no statistically significant differences between the segments on this measure.

FIGURE 31
Nights Stayed



(Means: Southern CA=3.1, Other USA=3.4, Foreign=3.8, TOTAL=3.4)

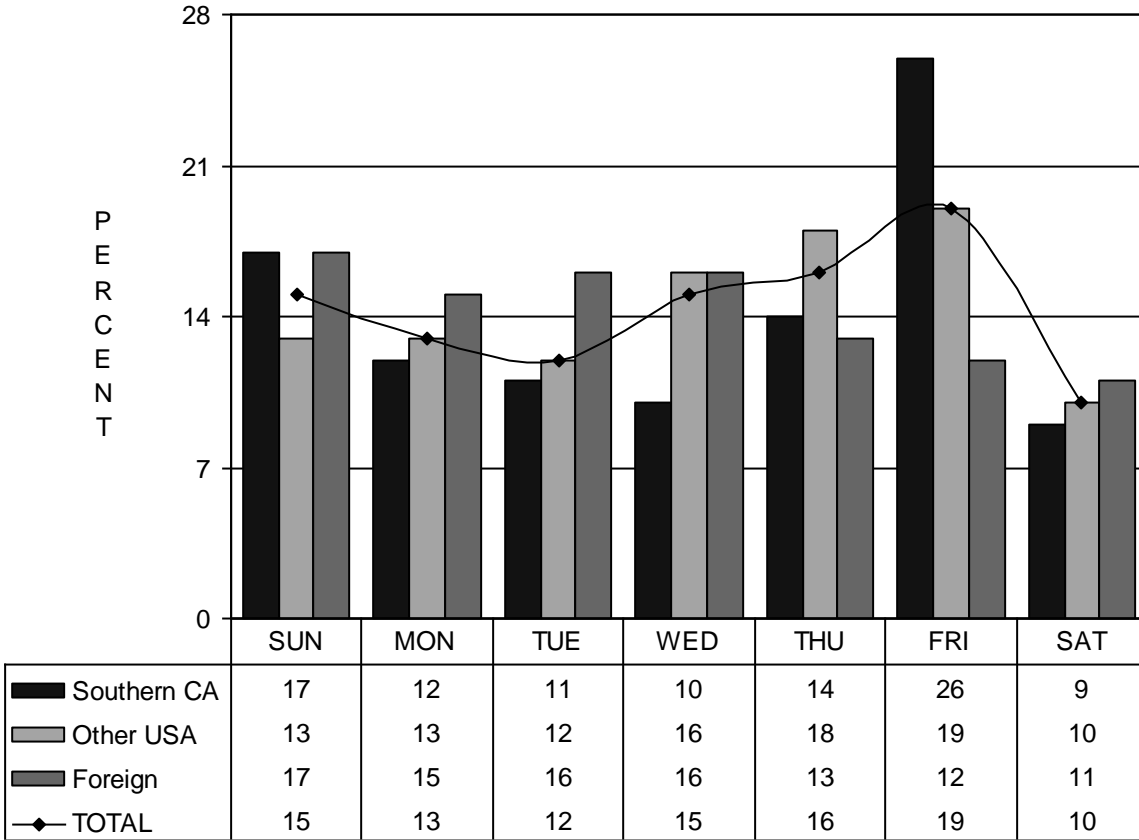
FIGURE 32
Days Stayed



(Means: Southern CA=4.1, Other USA=4.4, Foreign=4.8, TOTAL=4.4)

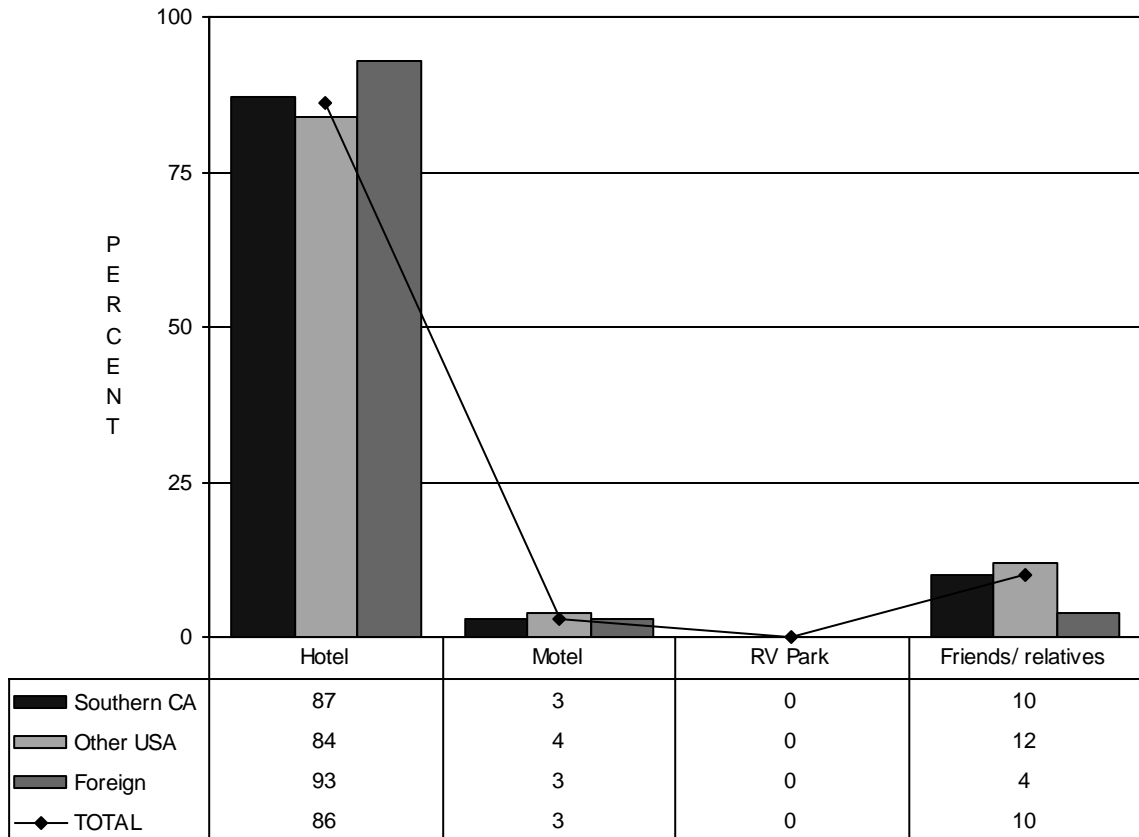
On average, foreign visitors (3.8 nights and 4.8 days) stayed the longest in Las Vegas, followed by other domestic visitors (3.4 nights and 4.4 days), and then Southern California visitors (3.1 nights and 4.1 days).

FIGURE 33
Day Of Arrival



All respondents were asked on what day of the week they arrived in Las Vegas. Southern California visitors (26%) were more likely to arrive on a Friday than other domestic visitors (19%), while foreign visitors (12%) were the least likely. Foreign visitors (16%) were the most likely to arrive on a Tuesday. Southern California visitors (10%) were less likely than other domestic or foreign visitors (16% each) to arrive on a Wednesday.

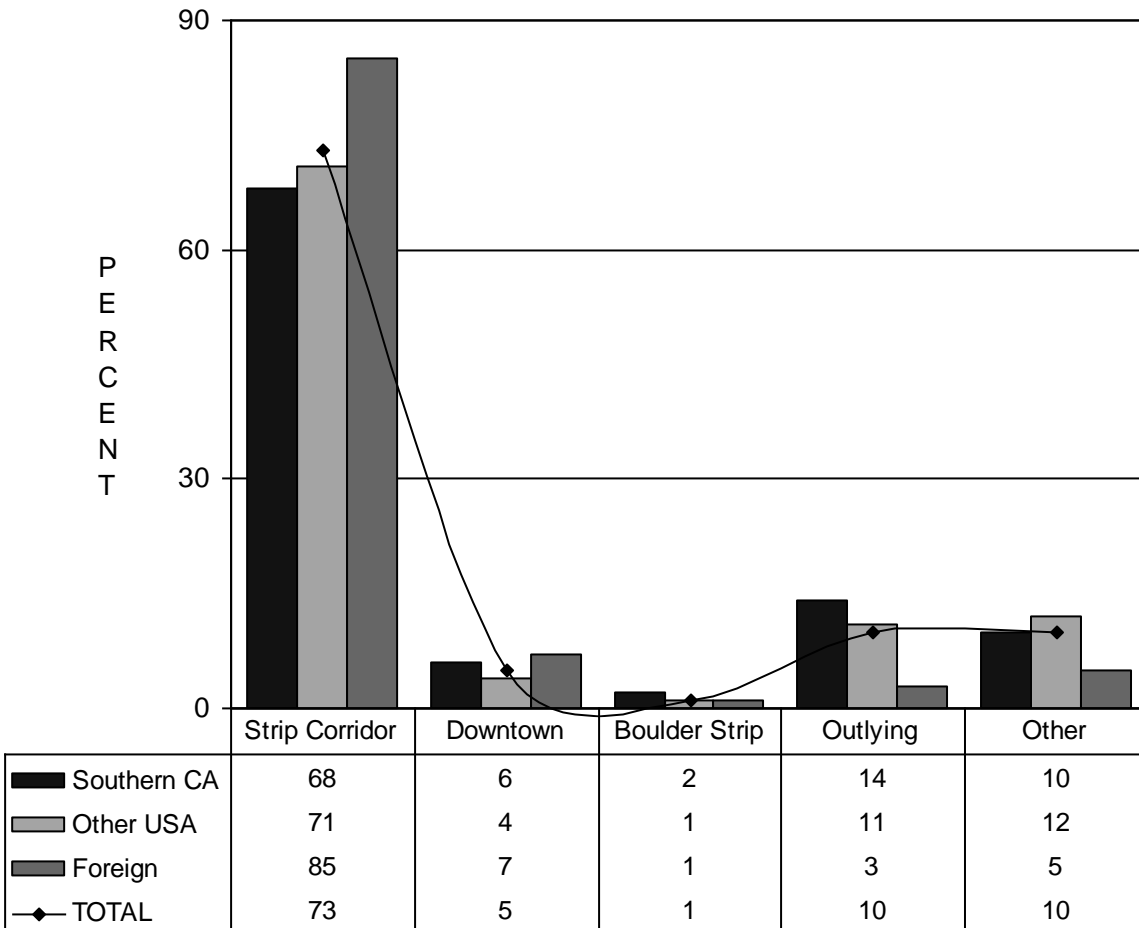
FIGURE 34
Type Of Lodging
(Among Those Who Stayed Overnight)



(Base Sizes: Southern CA=672, Other USA=2182, Foreign=726, TOTAL=3584)

Among those visitors who stayed overnight in Las Vegas, the vast majority (86%) stayed in a hotel. Foreign visitors (93%) were more likely than Southern California (87%) and other domestic visitors (84%) to have stayed in a hotel. Southern California (10%) and other domestic visitors (12%) were more likely than foreign visitors (4%) to say they stayed with friends or relatives.

FIGURE 35
Location Of Lodging
(Among Those Who Stayed Overnight)

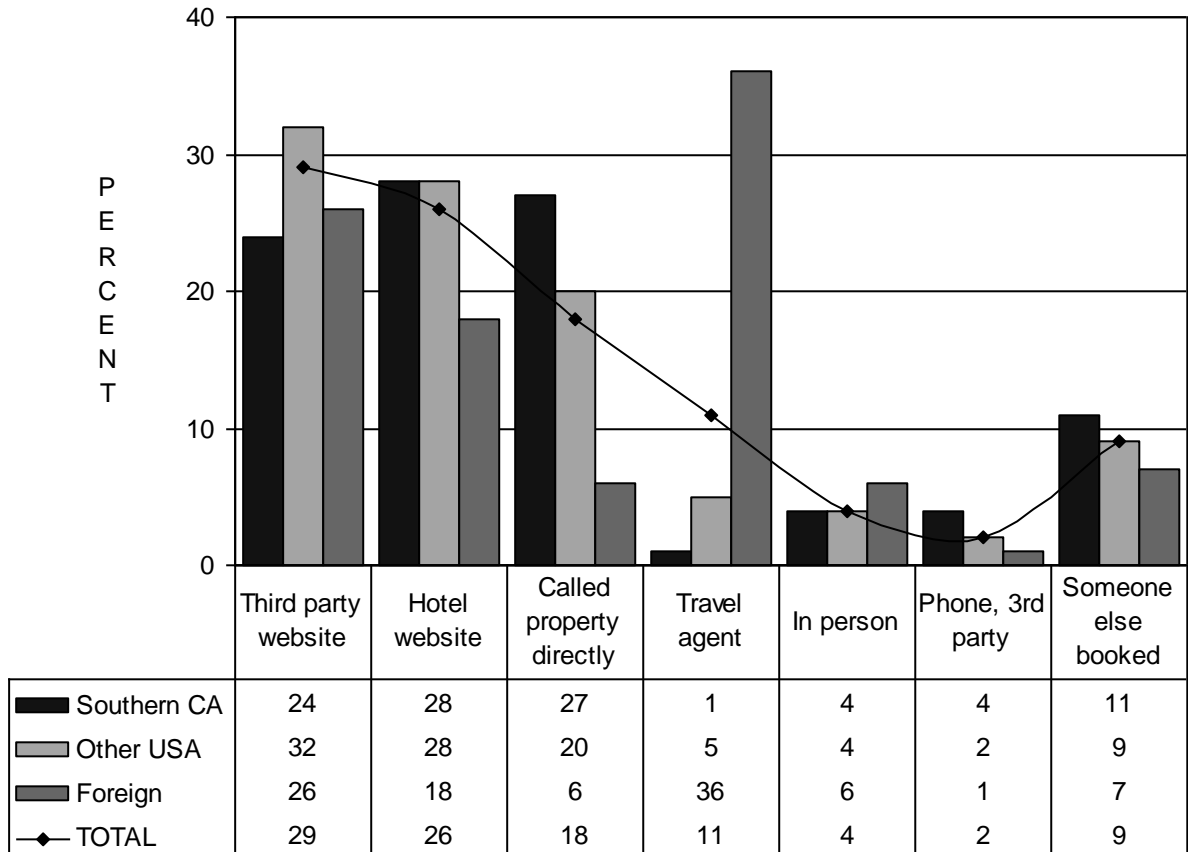


(Base Sizes: Southern CA=672, Other USA=2182, Foreign=726, TOTAL=3584)

Foreign visitors (85%) were more likely to have stayed on the Strip Corridor* than both other domestic visitors (71%) and Southern California visitors (68%). Southern California visitors (14%) and other domestic visitors (11%) were more likely than foreign visitors (3%) to have stayed in outlying areas.

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

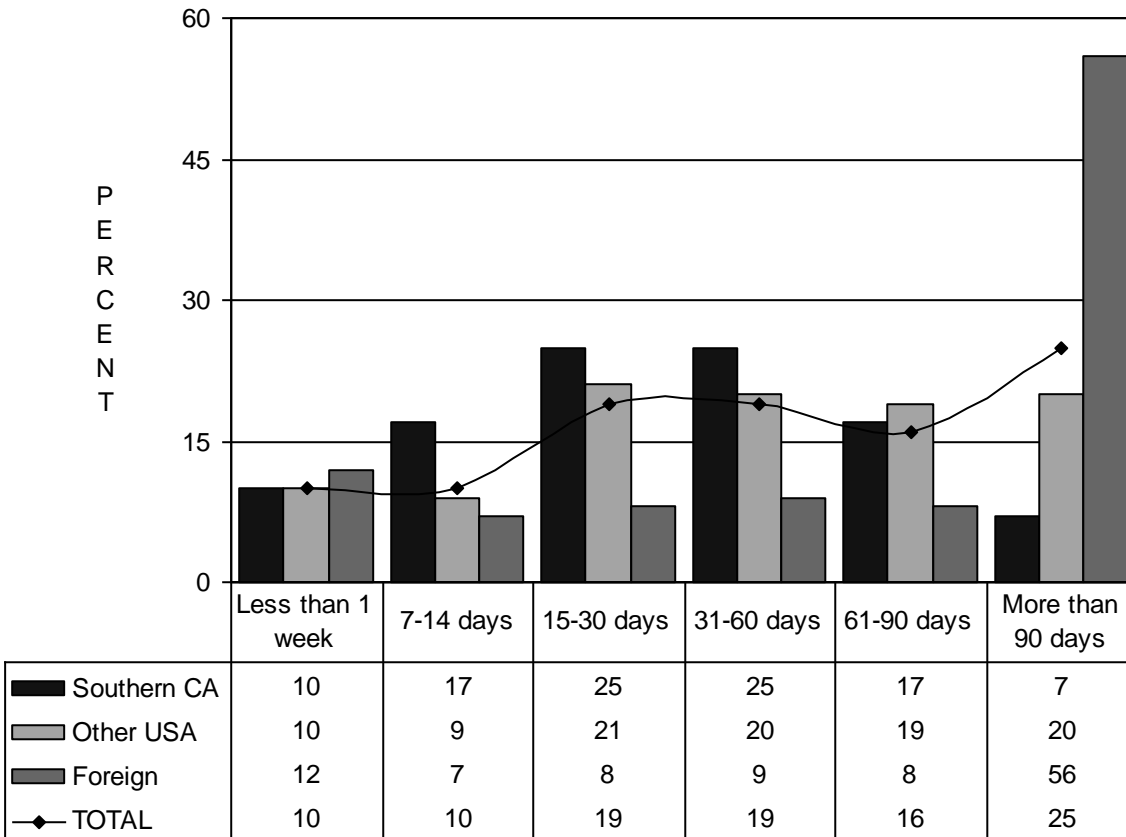
FIGURE 36
How Booked Accommodations In Las Vegas
(Among Those Who Stayed In A Hotel/Motel/RV Park)



(Base Sizes: Southern CA=601, Other USA=1879, Foreign=686, TOTAL=3171)

Visitors who stayed overnight were asked how they or someone in their party booked their accommodations in Las Vegas for their most recent trip. Other domestic visitors (32%) were more likely than Southern California visitors (24%) or foreign visitors (26%) to say they booked their accommodations through a third-party website, while Southern California visitors and other domestic visitors (both 28%) were more likely than foreign visitors (18%) to have booked their accommodations on a hotel website. Southern California visitors (27%) were more likely than other domestic visitors (20%) to say they called the property directly, while foreign visitors (6%) were the least likely to have done so. Foreign visitors (36%) were significantly more likely than other domestic visitors (5%) to have used a travel agent to book their accommodations, while Southern California visitors (1%) were the least likely. Southern California visitors (4%) were the most likely segment to book by phone through a third party.

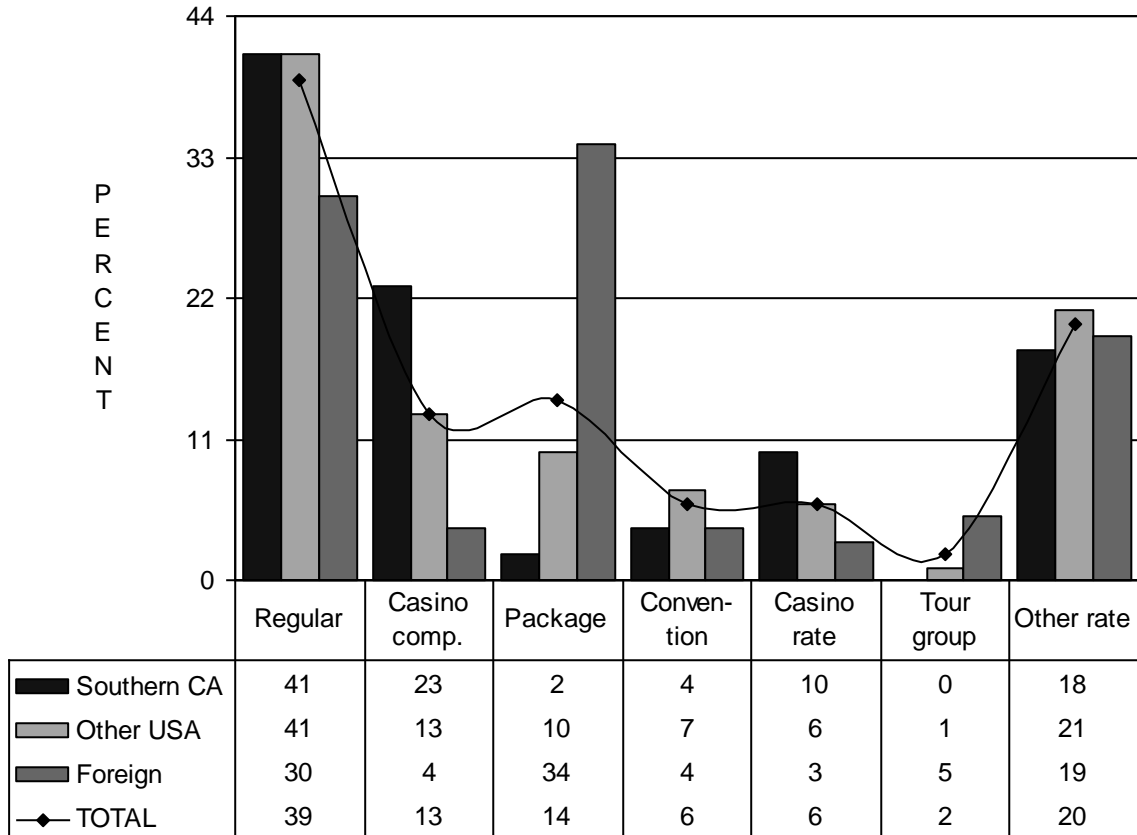
FIGURE 37
Advance Booking Of Accommodations
(Among Those Who Stayed In A Hotel/Motel/RV Park)



(Base Sizes: Southern CA=601, Other USA=1879, Foreign=686, TOTAL=3171)

Foreign visitors tended to book their accommodations the farthest in advance, followed by other domestic visitors, and finally by Southern California visitors. For example, foreign visitors (73%) were more likely than other domestic visitors (59%) to book their accommodations more than a month in advance, while Southern California visitors (49%) were the least likely. Southern California visitors (42%) were more likely to book their lodging one week to one month in advance of their trip than other domestic visitors (30%), while foreign visitors (15%) were the least likely.

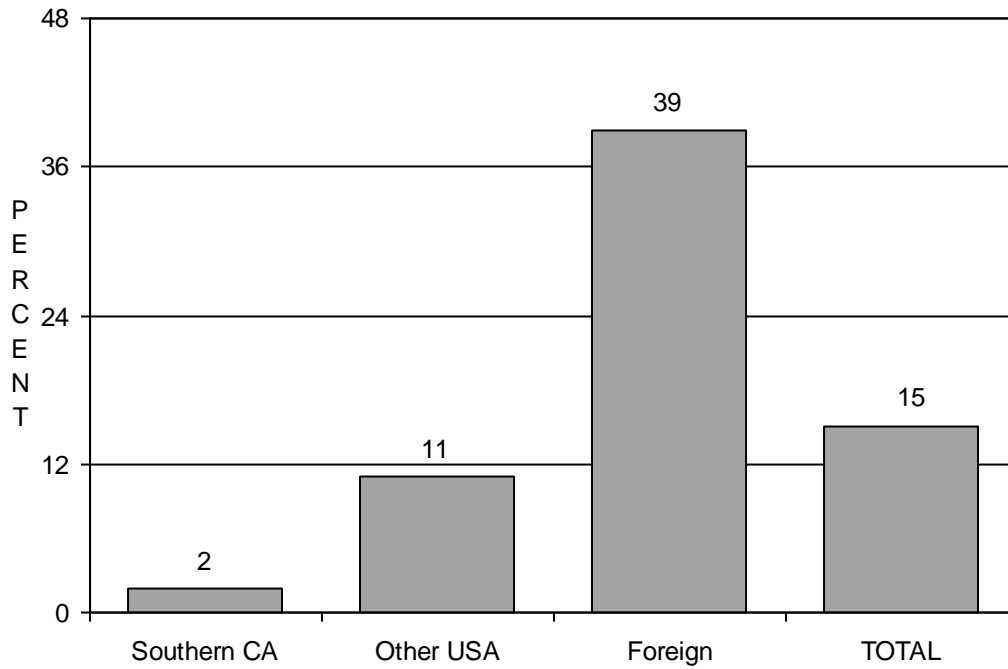
FIGURE 38
Type Of Room Rates
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Southern CA=601, Other USA=1878, Foreign=689, TOTAL=3173)

Looking at the type of room rates received by hotel/motel lodgers, both Southern California visitors and other domestic visitors (41% each) were more likely than foreign visitors (30%) to have received a regular room rate. Southern California visitors (23%) were the most likely to have received a casino complimentary room rate, followed by other domestic visitors (13%), and foreign visitors (4%). Foreign visitors (34%) were the most likely segment to have received a package rate, followed by other domestic visitors (10%), while Southern California visitors (2%) were the least likely. Foreign visitors were also the most likely to receive a tour group rate (5%). Other domestic visitors (7%) were the most likely segment to receive a convention rate.

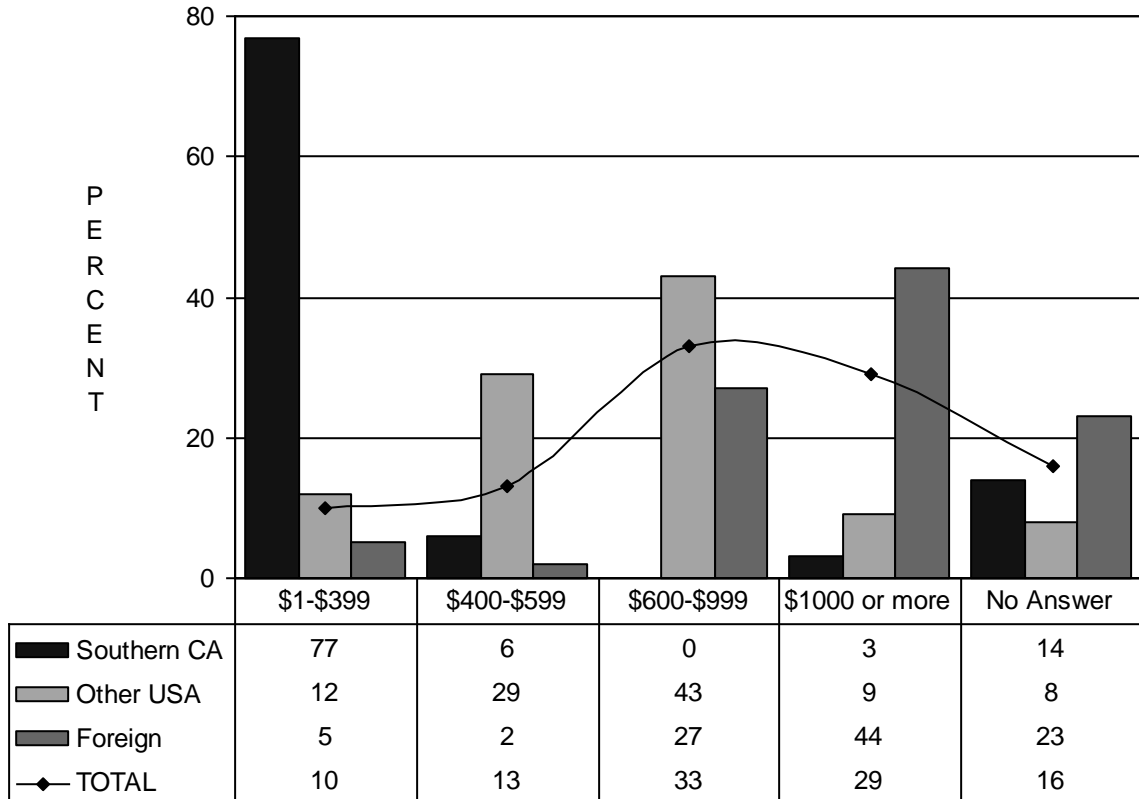
FIGURE 39
Package Purchasers
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Southern CA=601, Other USA=1878, Foreign=689, TOTAL=3173)

Foreign visitors (39%) were the most likely and Southern California visitors the least likely (2%) to be visiting Las Vegas as part of a tour group or package deal.

FIGURE 40
Cost Of Package Per Person
(Among Those Who Bought A Package)

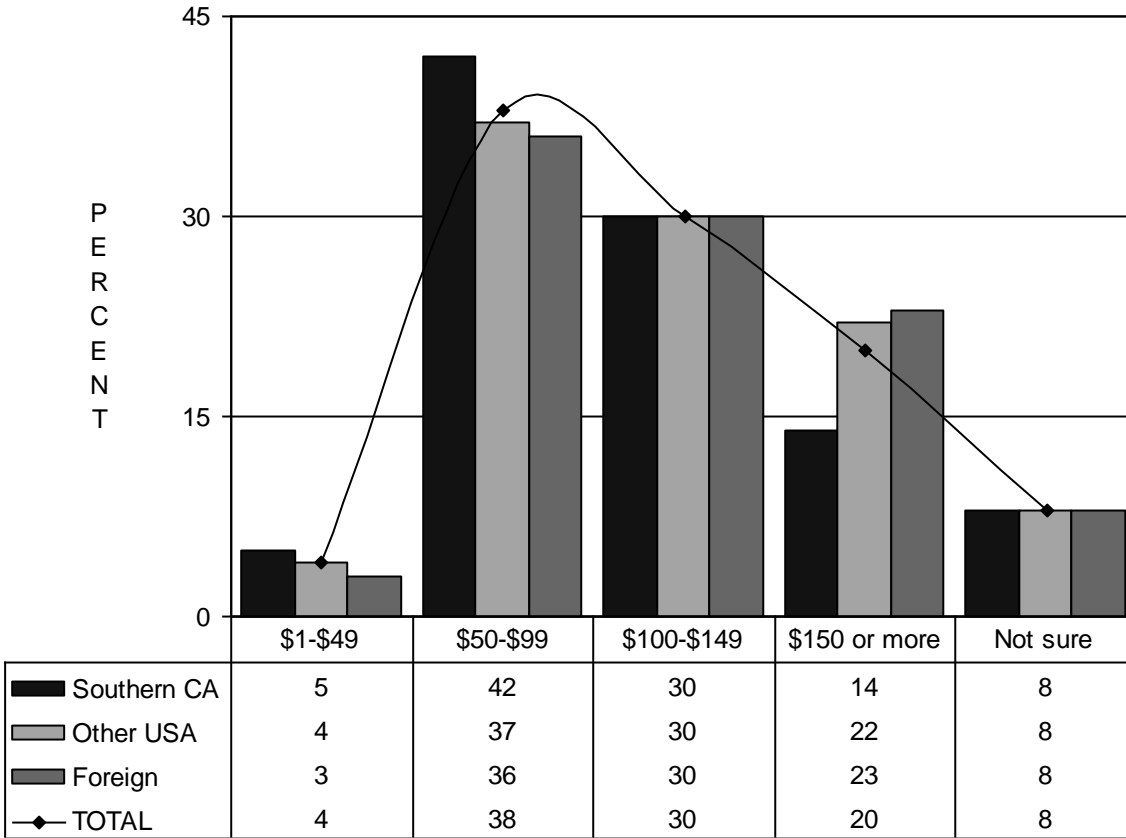


(Base Sizes: Southern CA=14*, Other USA=203, Foreign=271, TOTAL=487)
(Mean: Southern CA=\$266.90, Other USA=\$655.51, Foreign=\$1,176.50, TOTAL=\$910.99)

We asked those visitors who purchased either a hotel or airline, or a tour/travel group package, how much their package cost per person. On average, foreign visitors paid the most by far for their package (\$1,176.50), followed by other domestic visitors (\$655.51), while Southern California visitors (\$266.90) paid the least. In fact, 44% of foreign visitors paid \$1,000 or more for their package, compared to 9% of other domestic visitors and 3% of Southern California visitors. By contrast, 77% of Southern California visitors paid less than \$400 for their package, compared to 12% of other domestic visitors and 5% of foreign visitors.

* Note extremely small base size for Southern California visitors.

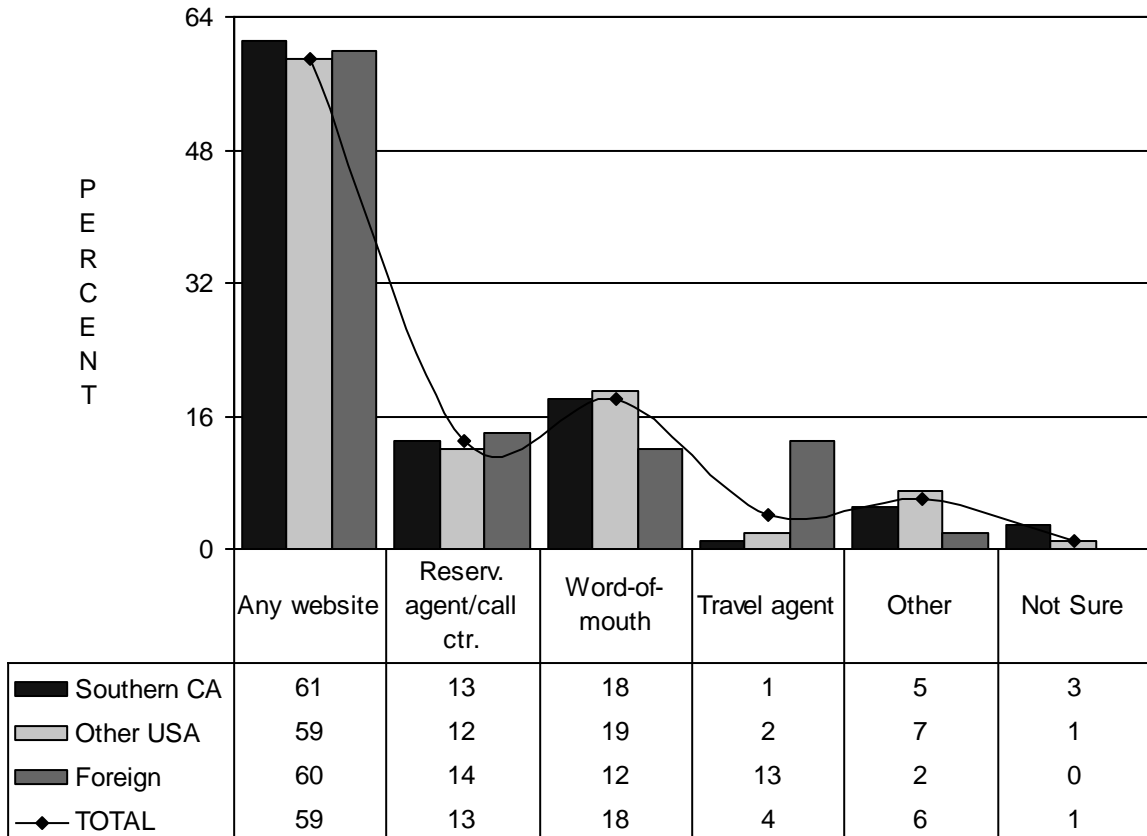
FIGURE 41
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel Or Motel/Non-Package And Non -Comp)



(Base Sizes: Southern CA=446, Other USA=1424, Foreign=389, TOTAL=2265)
(Means: Southern CA=\$106.90, Other USA=\$113.86, Foreign=\$120.79, 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. Overall, the average per night cost for lodging was \$113.66. Foreign visitors (mean of \$120.79) spent more on their lodging per night than Southern California visitors (\$106.90).

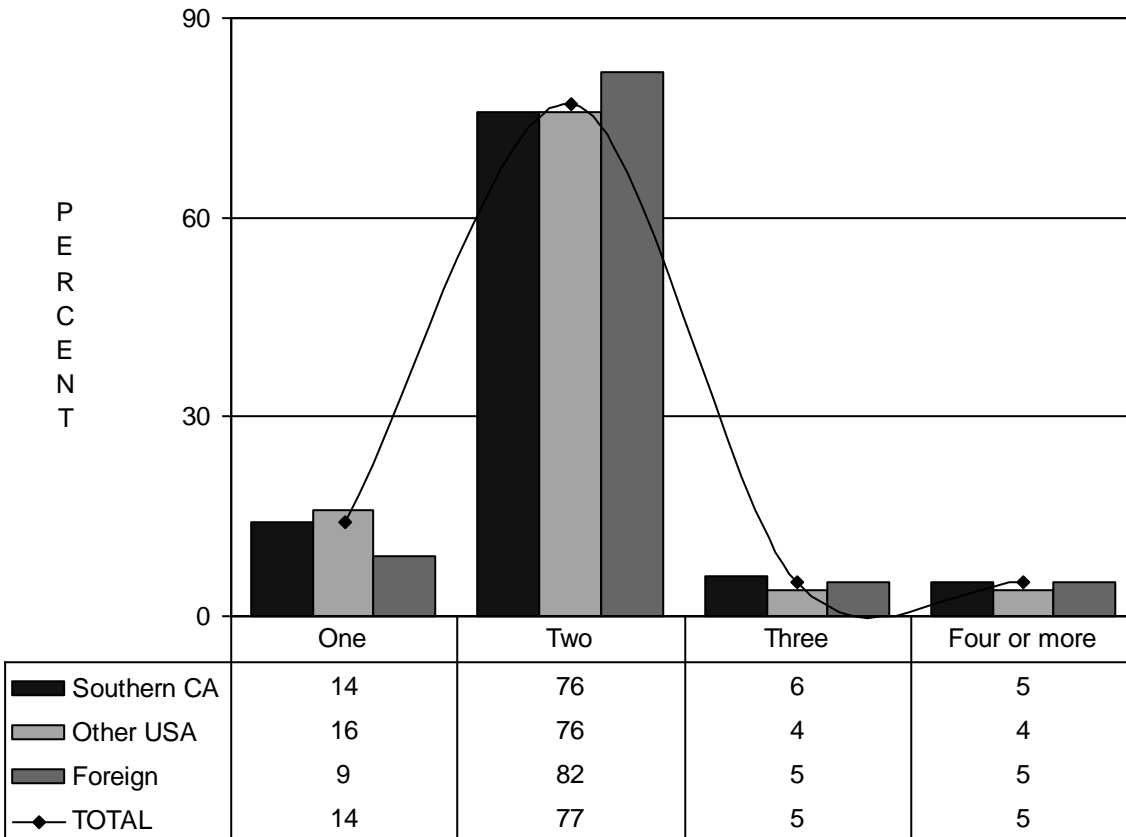
FIGURE 42
How First Found Out About Room Rate
(Among Those Staying In A Hotel Or Motel/Non-Package)



(Base Sizes: Southern CA=446, Other USA=1424, Foreign=389, TOTAL=2265)

Visitors were asked how they first found out about the room rate they paid. Foreign visitors (13%) were more likely than Southern California visitors (1%) or other domestic visitors (2%) to say they heard about the rate from a travel agent. Southern California visitors (18%) and other domestic visitors (19%) were more likely than foreign visitors (12%) to say they heard about the rate via word of mouth.

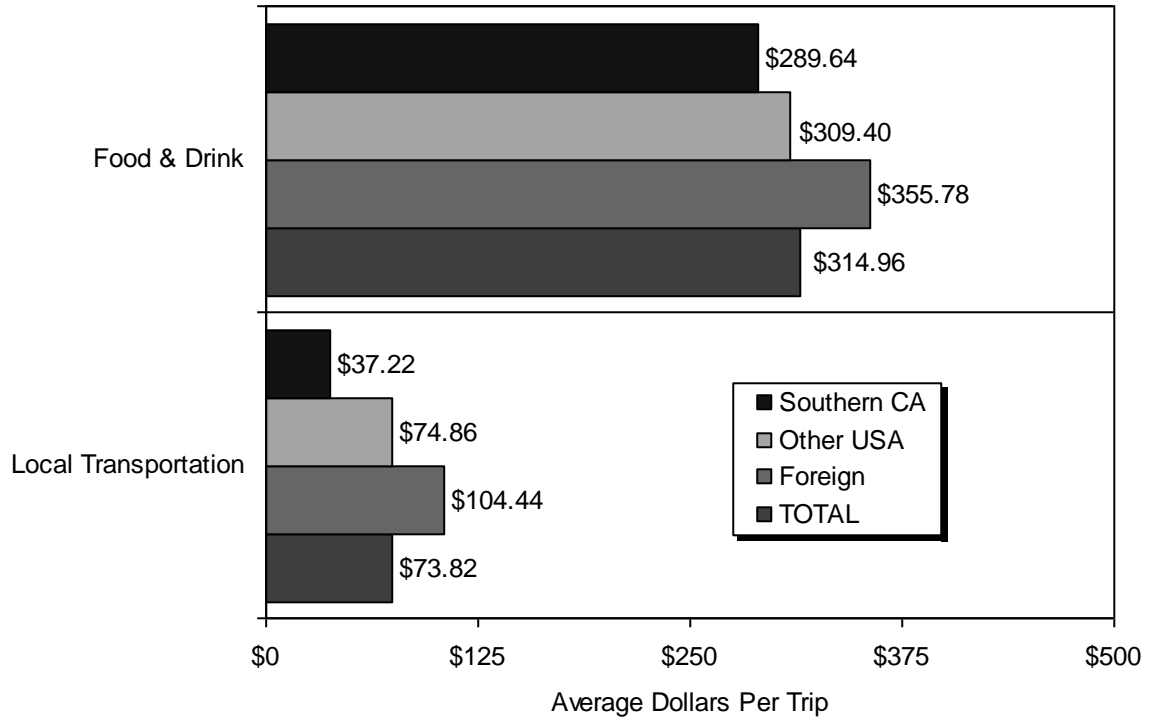
FIGURE 43
Number Of Room Occupants
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Southern CA=605, Other USA=1915, Foreign=695, TOTAL=3220)
(Means: Southern CA=2.0, Other USA=2.0, Foreign=2.1, TOTAL=2.0)

The majority of visitors who stayed overnight in a hotel or motel (77%) said two people stayed in their room. Foreign visitors (82%) were more likely than Southern California visitors and other domestic visitors (76% each) to say two people stayed in their room. Foreign visitors (9%) were the least likely segment to say they roomed alone. The average number of room occupants among all lodgers was 2.0. The average number of room occupants among foreign visitors (2.1) was higher than the average for other domestic visitors (2.0).

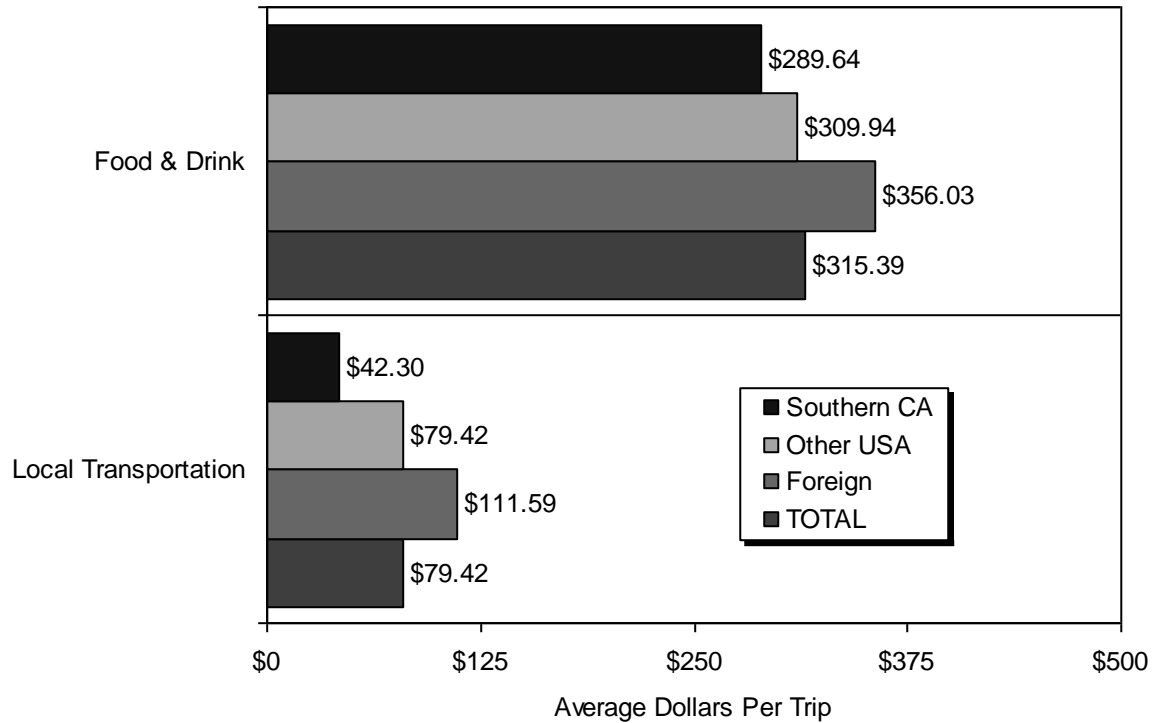
FIGURE 44
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Including Visitors Who Spent Nothing In That Category)



On average foreign visitors (\$355.78) spent more on food and drink than both other domestic visitors (\$309.40) and Southern California visitors (\$289.64).

Similarly, foreign visitors (\$104.44) spent the most on local transportation, followed by other domestic visitors (\$74.86), while Southern California visitors (\$37.22) spent the least.

FIGURE 45
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Among Spenders)

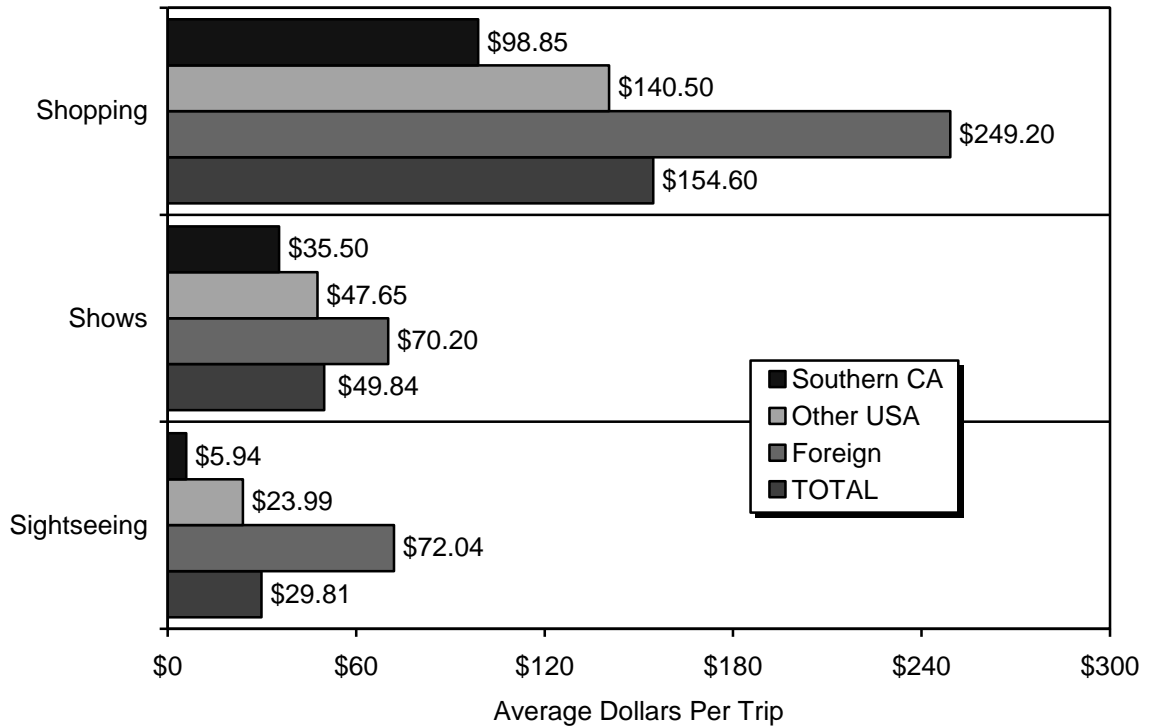


(Base Sizes, Food & Drink: Southern CA=672, Other USA=2190, Foreign=727, TOTAL=3594)
(Base Sizes, Local Transportation: Southern CA=592, Other USA=2068 Foreign=681, TOTAL=3346)

Among visitors who actually spent money on food and drink, on average Southern California visitors (\$289.64) and other domestic visitors (\$309.94) spent less than foreign visitors (\$356.03).

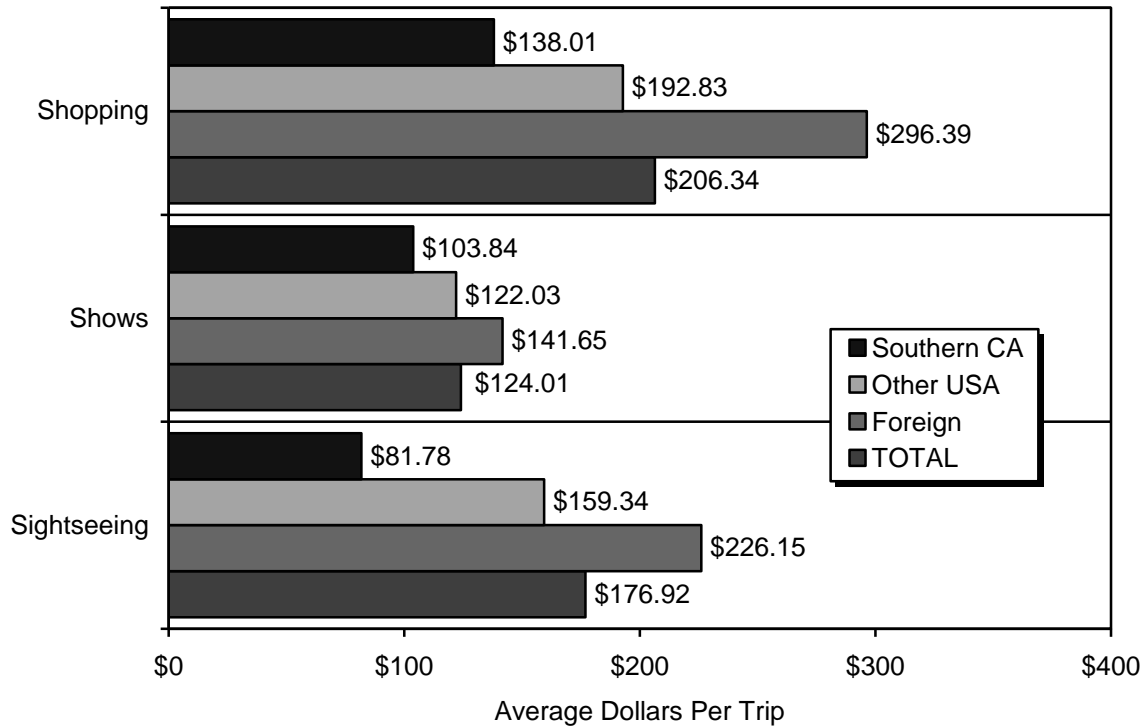
Among visitors who spent money on local transportation, other domestic visitors (\$79.42) spent more than Southern California visitors (\$42.30), while foreign visitors (\$111.59) spent more than both other segments.

FIGURE 46
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Including Visitors Who Spent Nothing In That Category)



On average, foreign visitors (\$249.20) spent the most on shopping followed by other domestic visitors (\$140.50), with Southern California visitors (\$98.85) spending the least on shopping. Foreign visitors also spent the most on shows (\$70.20) followed by other domestic visitors (\$47.65), with Southern California visitors (\$35.50) spending the least on shows. In terms of sightseeing, foreign visitors (\$72.04) spent more than other domestic visitors (\$23.99), while Southern California visitors (\$5.94) spent the least.

FIGURE 47
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Among Spenders)



(Base Sizes, Shopping: Southern CA=482, Other USA=1599, Foreign=612, TOTAL=2697)

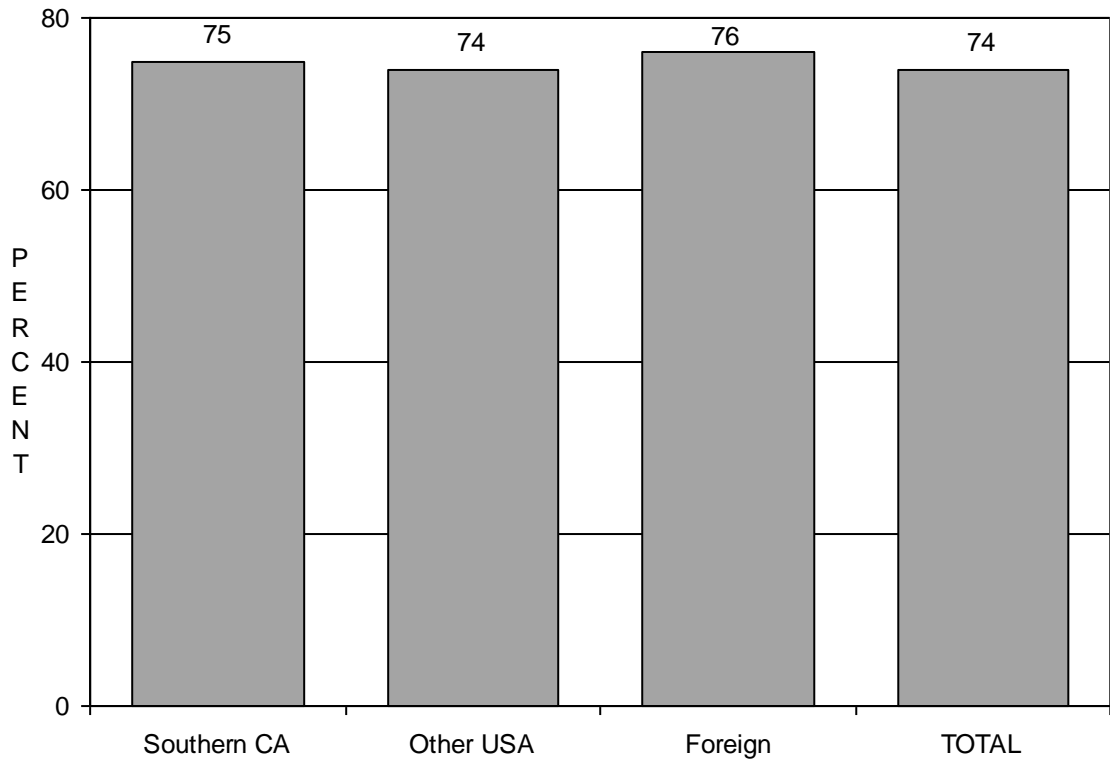
(Base Sizes, Shows: Southern CA=231, Other USA=859, Foreign=364, TOTAL=1454)

(Base Sizes, Sightseeing: Southern CA=49, Other USA=350, Foreign=262, TOTAL=663)

The above figure shows average trip expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas among visitors who spent money in each category. Foreign visitors spent the most in all three categories: shopping (\$296.39), shows (\$141.65), and sightseeing (\$226.15). On average, Southern California visitors spent the least on shopping (\$138.01) and sightseeing (\$81.78).

GAMING BEHAVIOR AND BUDGETS

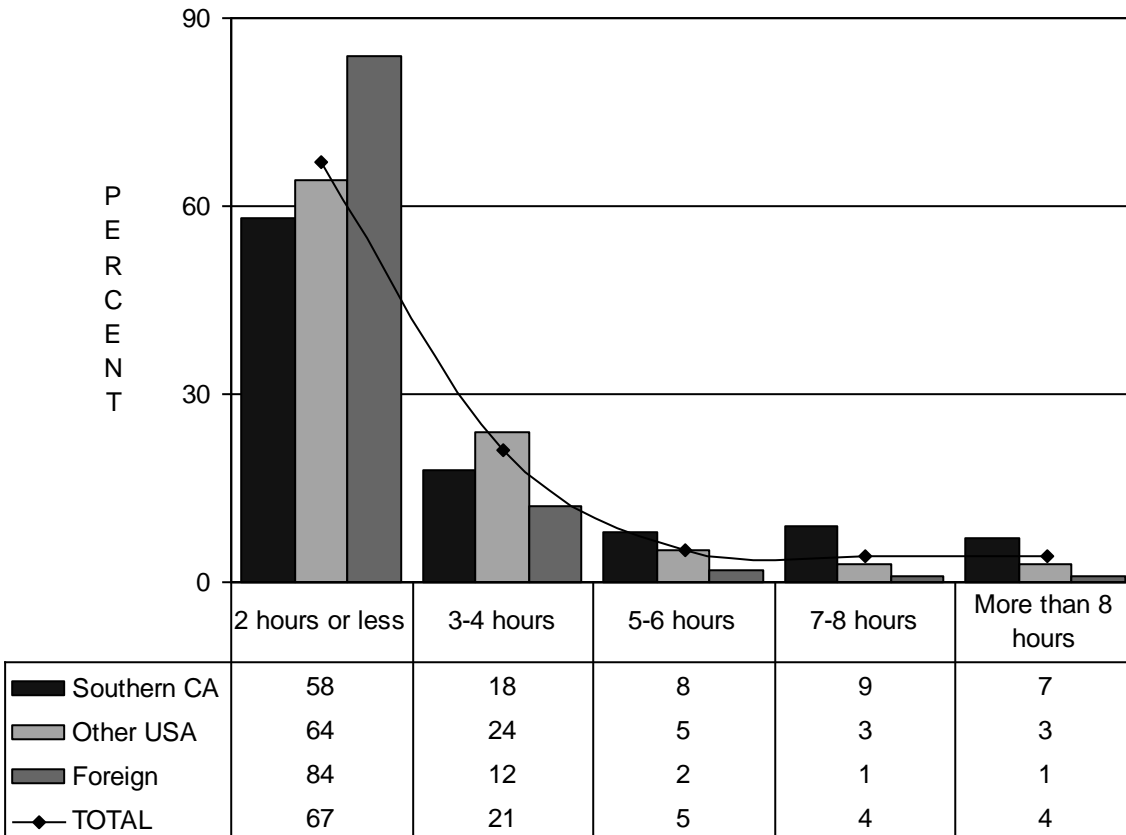
FIGURE 48
Whether Gambled While In Las Vegas



Only "yes" responses are reported in this figure.

More than seven in ten (74%) visitors gambled while in Las Vegas. There were no significant differences among the segments on this measure.

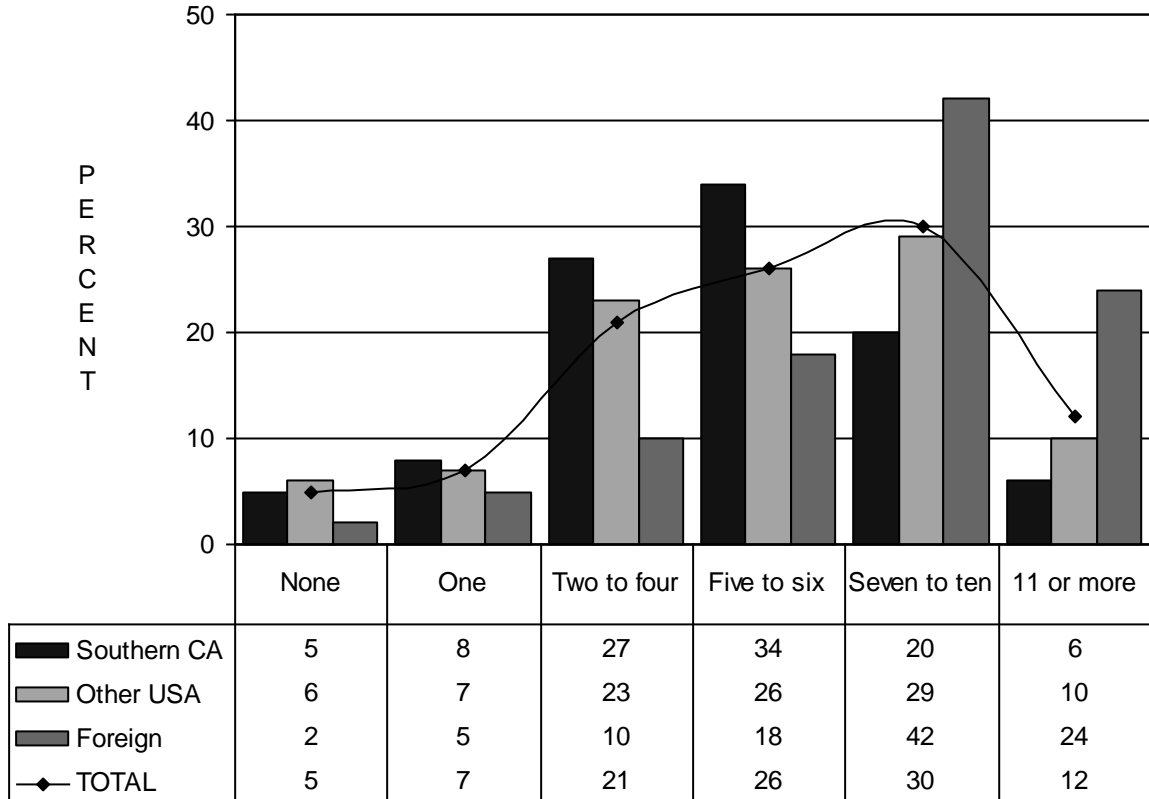
FIGURE 49
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



(Base Sizes: Southern CA=504, Other USA=1621, Foreign=551, TOTAL=2679)
(Means: Southern CA=3.1, Other USA=2.3, Foreign=1.1, TOTAL=2.2)

Among those visitors who said they gambled on their current trip to Las Vegas, Southern California visitors (average of 3.1 hours) spent the most time per day gambling, followed by other domestic visitors (2.3 hours), while foreign visitors (1.1 hours) spent the least amount of time per day gambling.

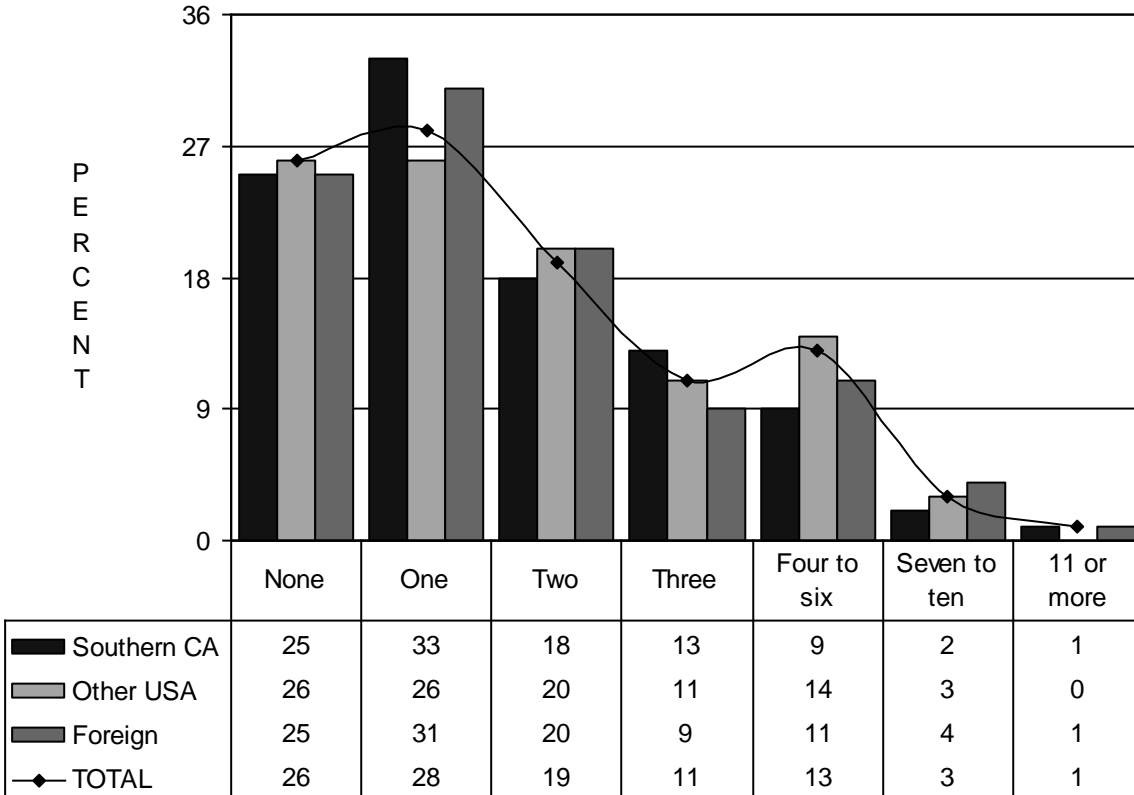
FIGURE 50
Number Of Casinos Visited



(Means: Southern California=5.4, Other USA=6.0, Foreign=8.3, TOTAL=6.4)

All respondents were asked how many casinos they had visited on their current trip to Las Vegas. On average, foreign visitors visited the most casinos (average of 8.3), followed by other domestic visitors (6.0), who in turn visited more casinos than visitors from Southern California (5.4).

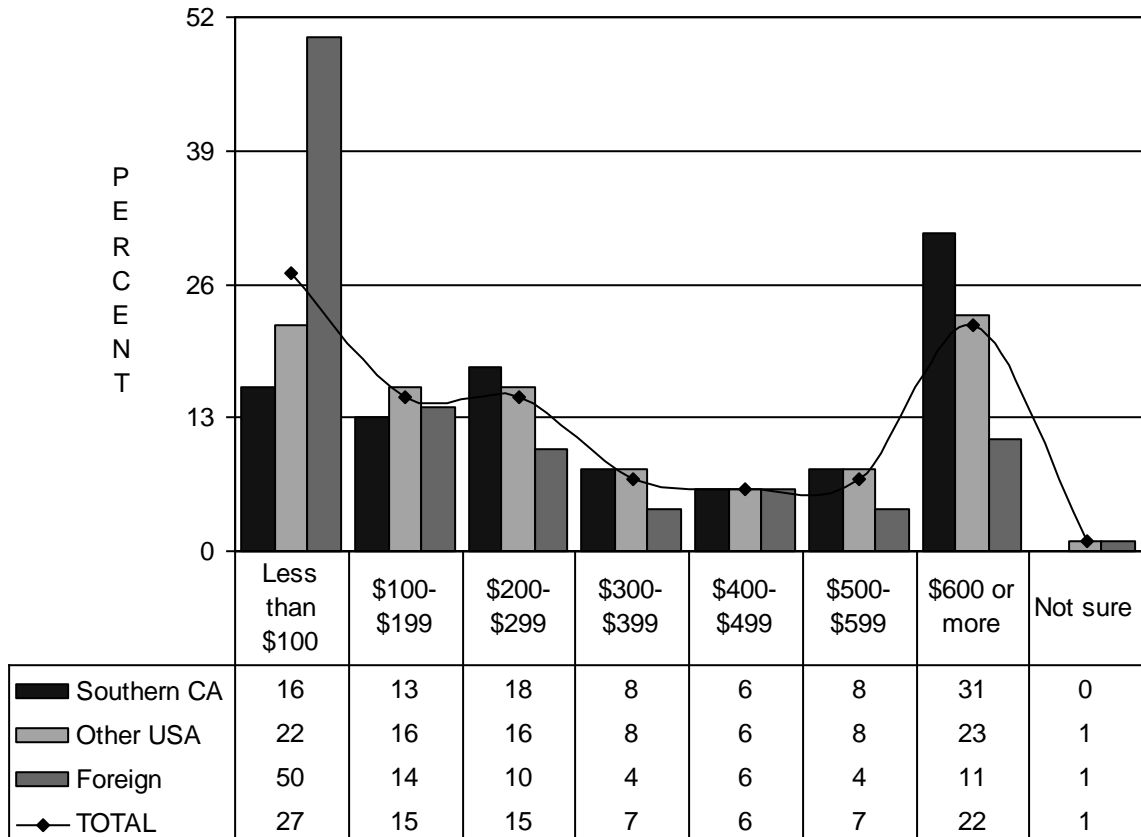
FIGURE 51
Number Of Casinos Where Gambled



(Means: Southern California=1.7, Other USA=1.9, Foreign=2.0, TOTAL=1.9)

All respondents were also asked how many casinos they had gambled in during their visit. There were no statistically significant differences among these segments in terms of the average number of casinos where they gambled.

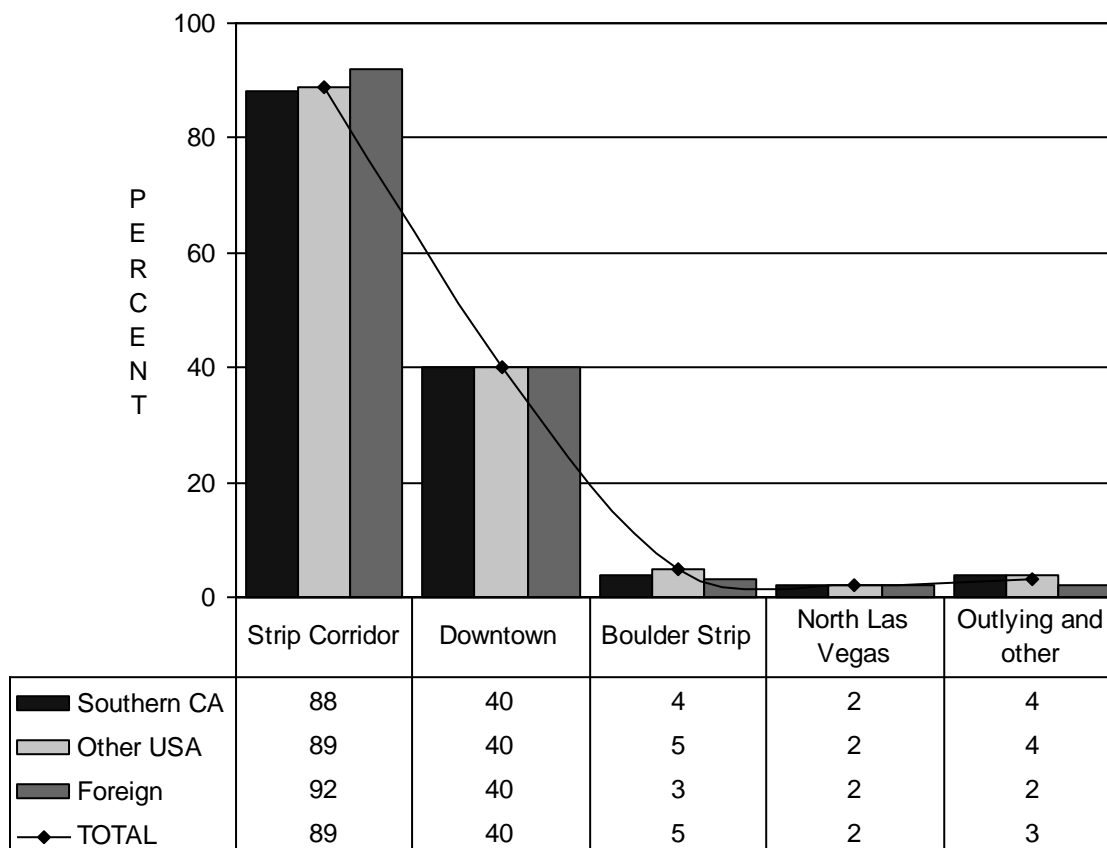
FIGURE 52
Trip Gambling Budget
(Among Those Who Gambled)



(Base Sizes: Southern CA=504, Other USA=1621, Foreign=551, TOTAL=2679)
(Means: Southern CA=\$613.76, Other USA=\$567.88, Foreign=\$321.12 TOTAL=\$527.05)

Overall, those visitors who gambled on their current visit to Las Vegas budgeted an average of \$527.05 for gaming. On average, Southern California visitors (average of \$613.76) and other domestic visitors (\$567.88) budgeted more for gambling than foreign visitors (\$321.12).

FIGURE 53
Where Visitors Gambled*
(Among Those Who Gambled)



(Base Sizes: Southern CA=677, Other USA=1548, Foreign=420, TOTAL=2652)

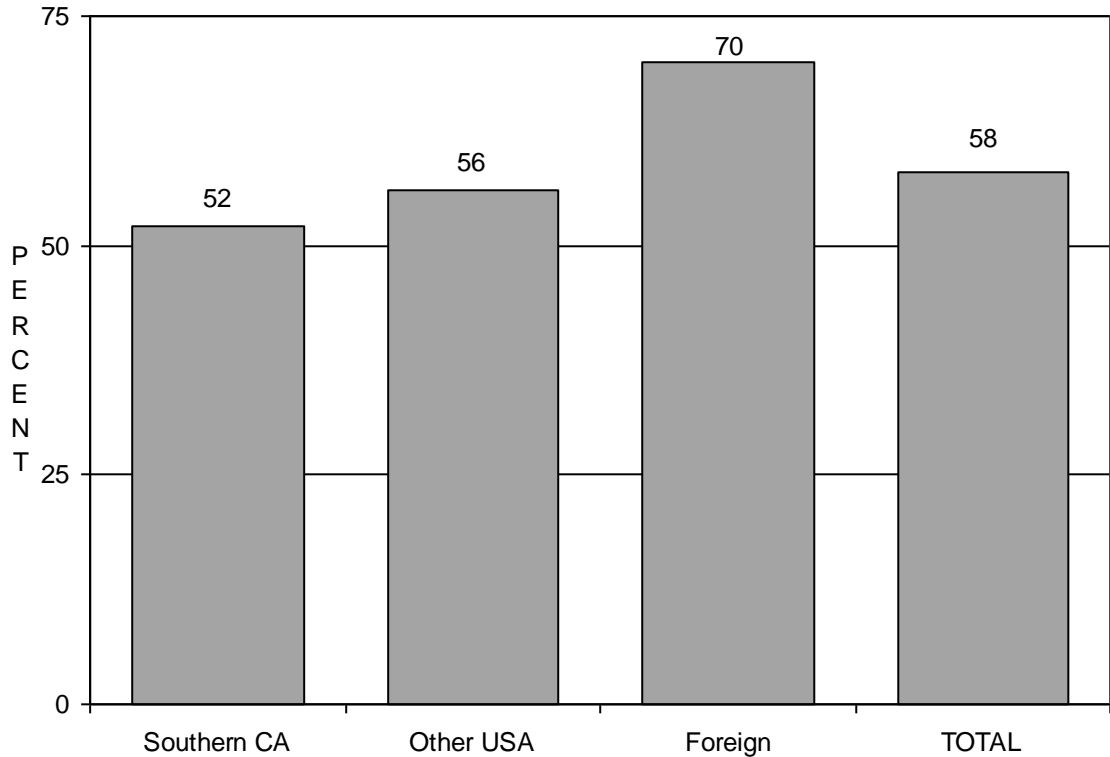
Multiple responses permitted

Most visitors (89%) gambled on the Strip Corridor. Foreign visitors (92%) were more likely to say they gambled on the Strip Corridor than other domestic visitors (89%). Other domestic visitors (5%) were more likely than foreign visitors (3%) to say they gambled on the Boulder Strip.

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

ENTERTAINMENT

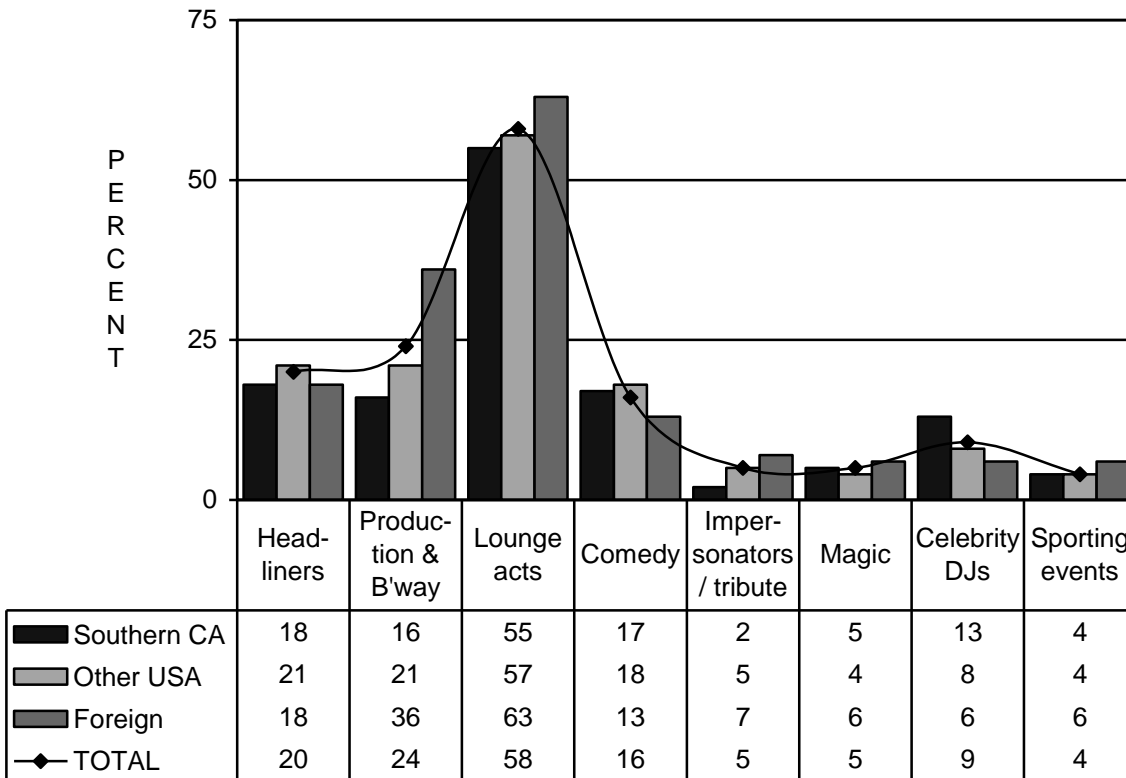
FIGURE 54
Attended A Show



Only "yes" responses are reported in this figure.

During their stay in Las Vegas, foreign visitors (70%) were more likely than other domestic visitors (56%) and Southern California visitors (52%) to have seen at least one show.

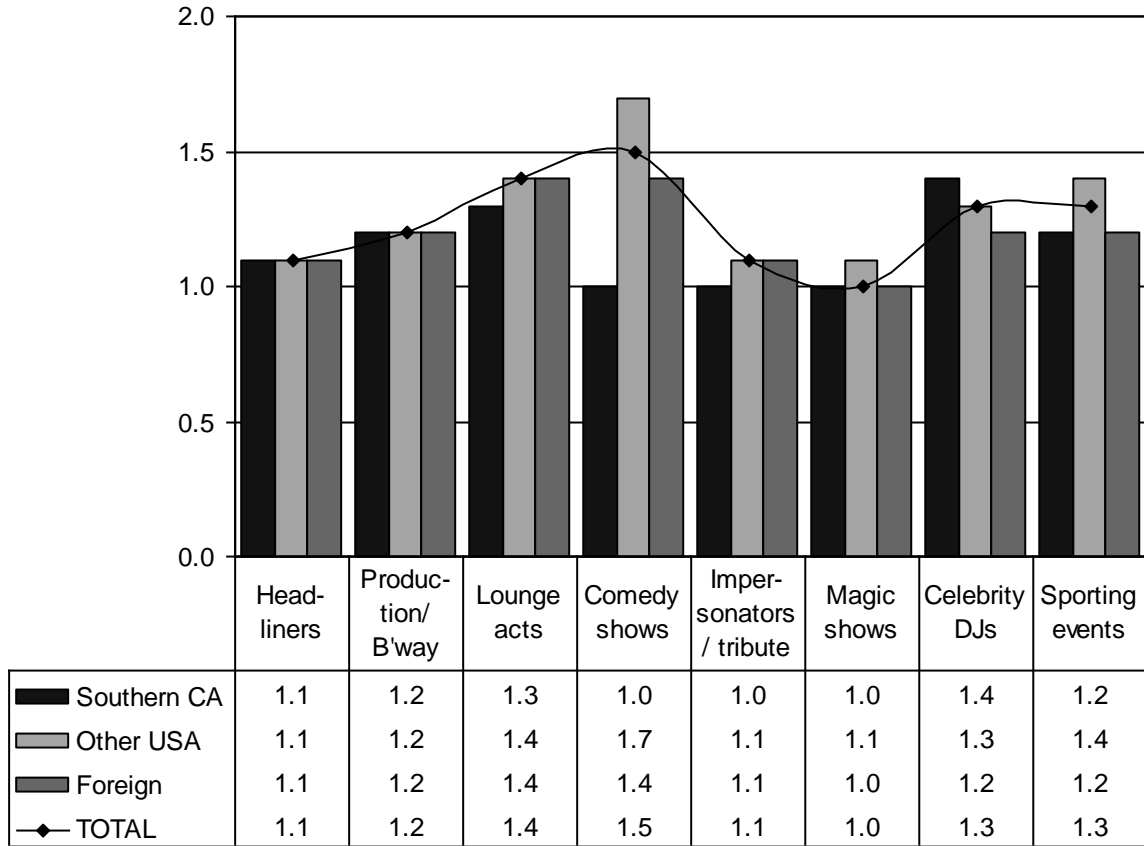
FIGURE 55
Types Of Entertainment
(Among Those Who Attended Some Form Of Entertainment)



Multiple responses permitted.
(Base Sizes: Southern CA=347, Other USA=1237, Foreign=508, TOTAL=2096)

Among those visitors who saw a show during their current trip to Las Vegas, nearly six in ten (58%) went to a lounge act. Foreign visitors were the most likely segment to see a production or Broadway show (36%). Southern California visitors (13%) were more likely than other domestic visitors (8%) to have seen a Celebrity DJ, while foreign visitors (6%) were the least likely. Other domestic visitors (18%) were more likely than foreign visitors (13%) to have seen a comedy show

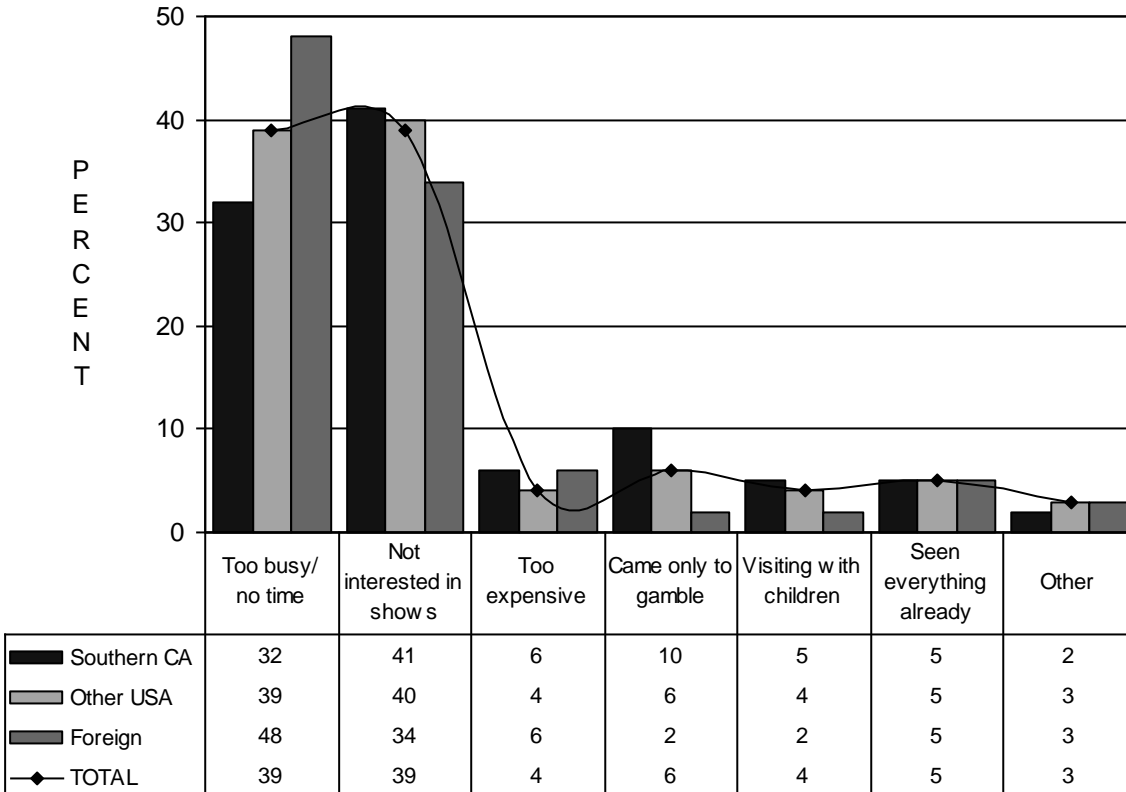
FIGURE 56
Average Number Of Shows Attended
(Among Those Who Attended Some Form Of Entertainment)



Multiple responses permitted.
(Base Sizes: Southern CA=347, Other USA=1237, Foreign=508, TOTAL=2096)

We looked at the average number of times visitors attended each type of show among those who attended shows. There were no statistically significant differences between these visitor segments on these measures.

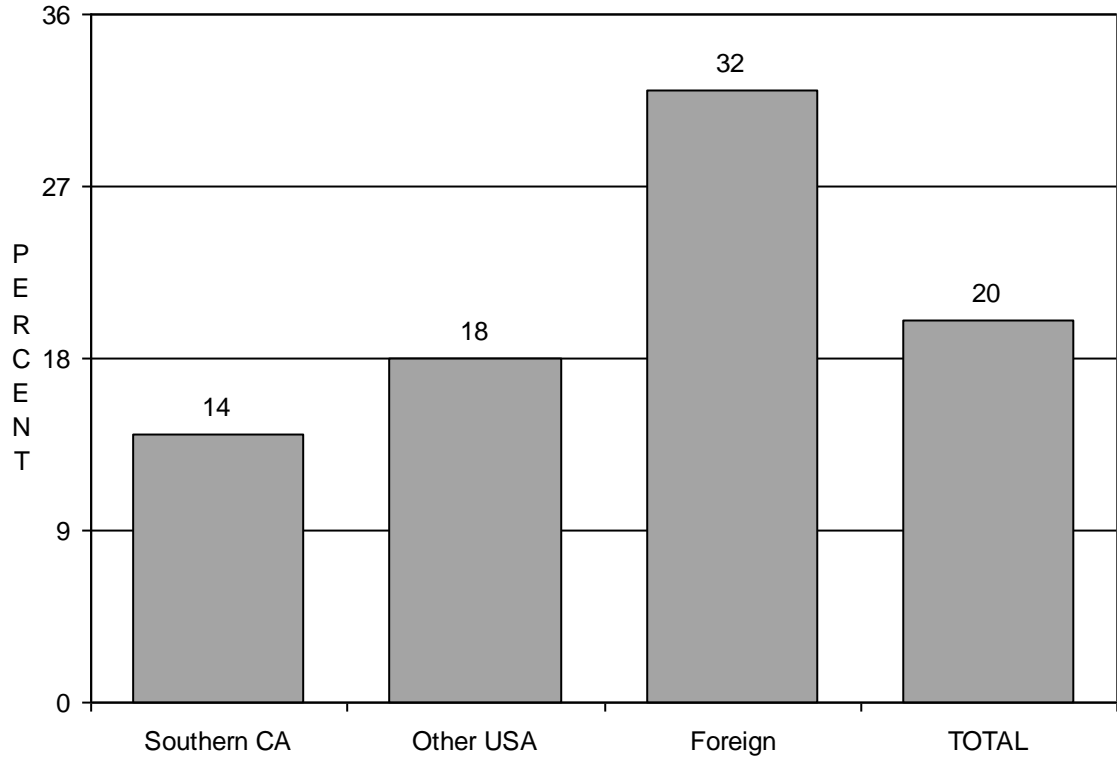
FIGURE 57
Main Reason For Not Attending Any Shows
(Among Those Who Attended No Shows)



(Base Sizes: Southern CA=325, Other USA=956, Foreign=220, TOTAL=1503)

Visitors who did not attend any shows while in Las Vegas were asked why. The most common reasons cited were a lack of time or no interest (both at 39%). Foreign visitors (48%) were the most likely segment to cite a lack of time and the least likely to say they came only to gamble (2%).

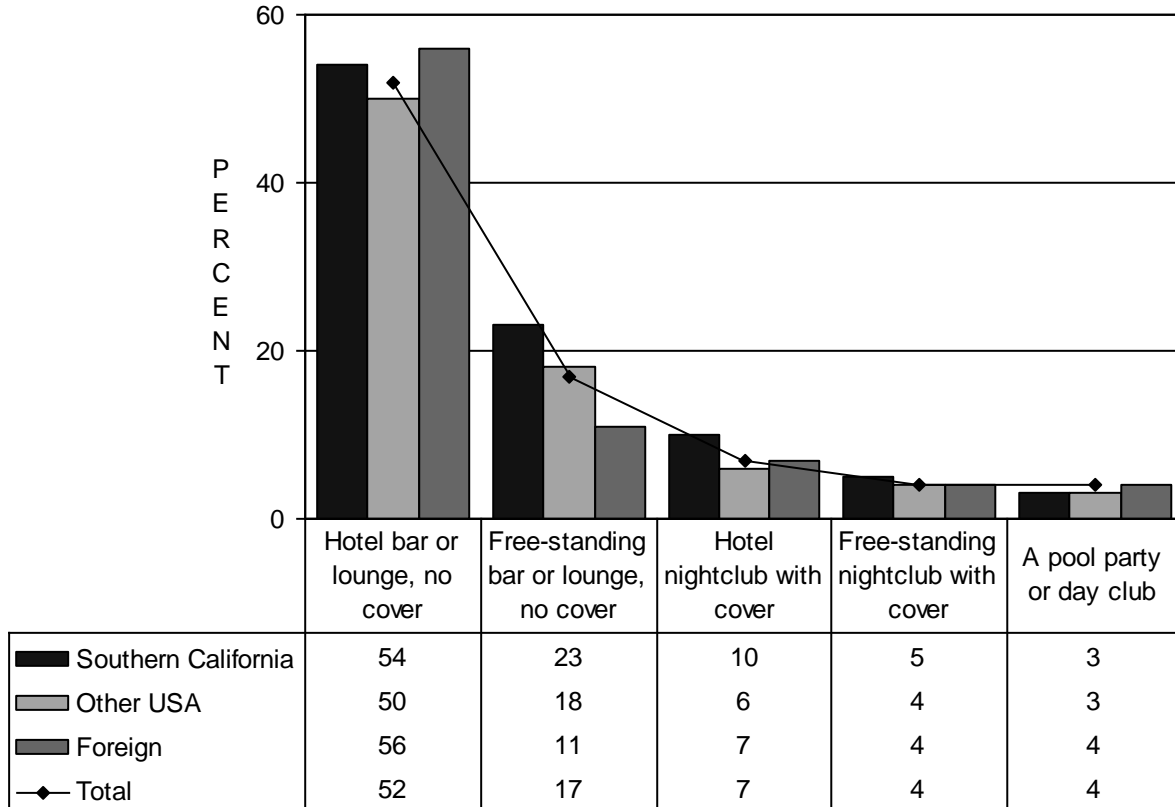
FIGURE 58
Whether Have Been To Other Paid Attractions



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. Foreign visitors (32%) were more likely than both other domestic visitors (18%) and Southern California visitors (14%) to have done so.

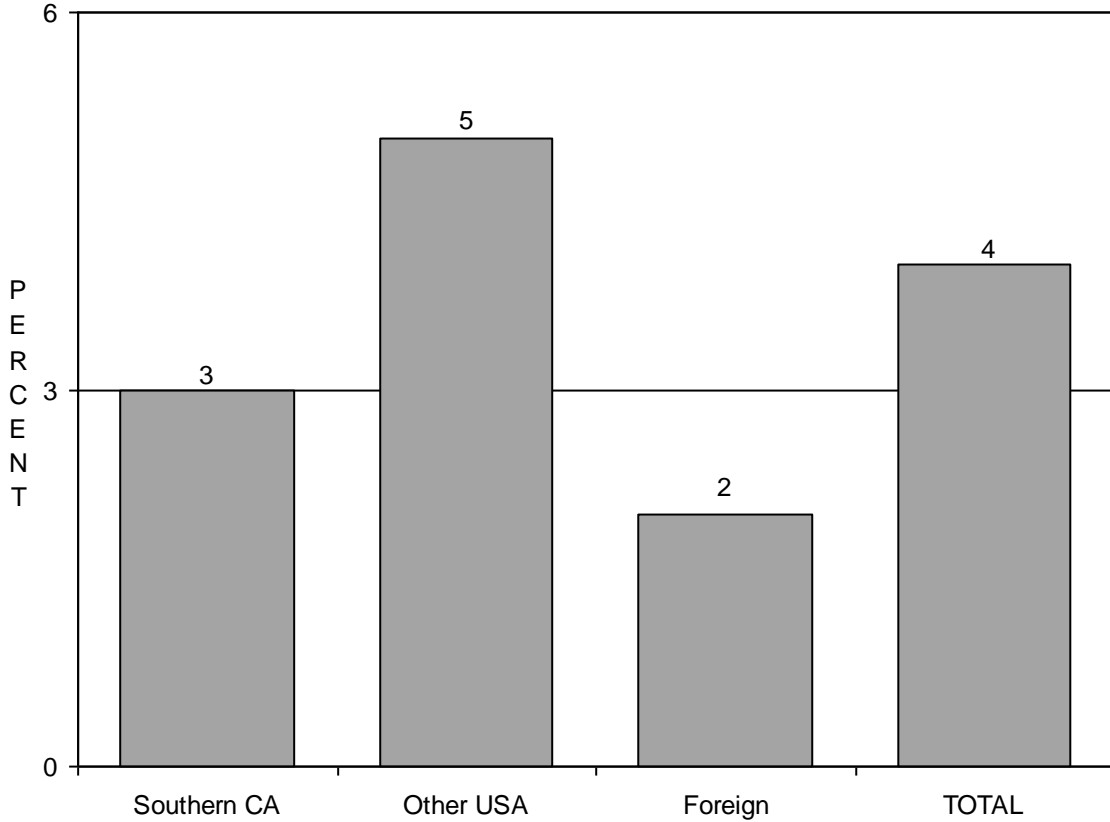
FIGURE 59
Whether Has Been To Nightclubs, Bars, And Lounges



Multiple responses permitted.

We asked visitors if they visited nightclubs, bars, lounges or pool parties or day clubs while in Las Vegas. Southern California visitors were the most likely to say they had been to a free-standing bar or lounge without a cover charge (23%), while other domestic visitors (18%) were more likely than foreign visitors (11%) to have done so. Southern California visitors were also more likely to have gone to a nightclub in a hotel with a cover charge (10%) than other domestic visitors (6%), while foreign visitors (56%) were more likely than other domestic visitors (50%) to have gone to a bar or lounge in a hotel without a cover charge.

FIGURE 60
Whether Visited A Spa

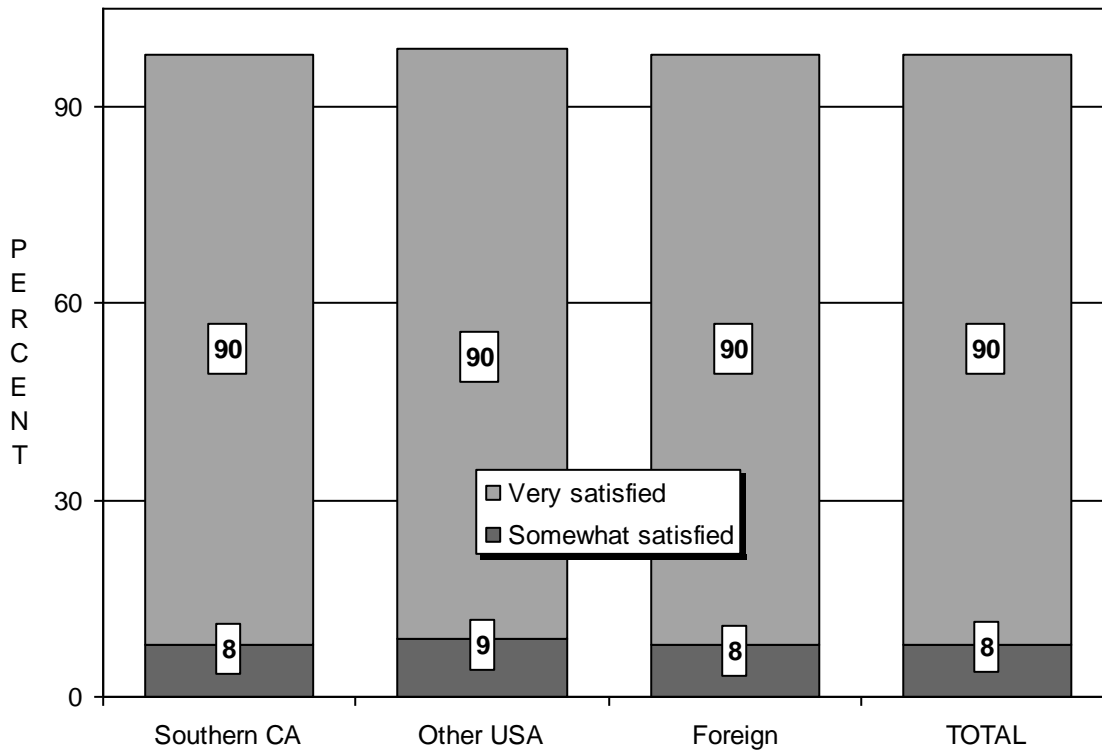


Only "yes" responses are reported in this figure.

Visitors were asked if they had visited a spa during this trip to Las Vegas. Four percent (4%) said they had. Other domestic visitors (5%) were more likely than foreign visitors (2%) to have visited a spa.

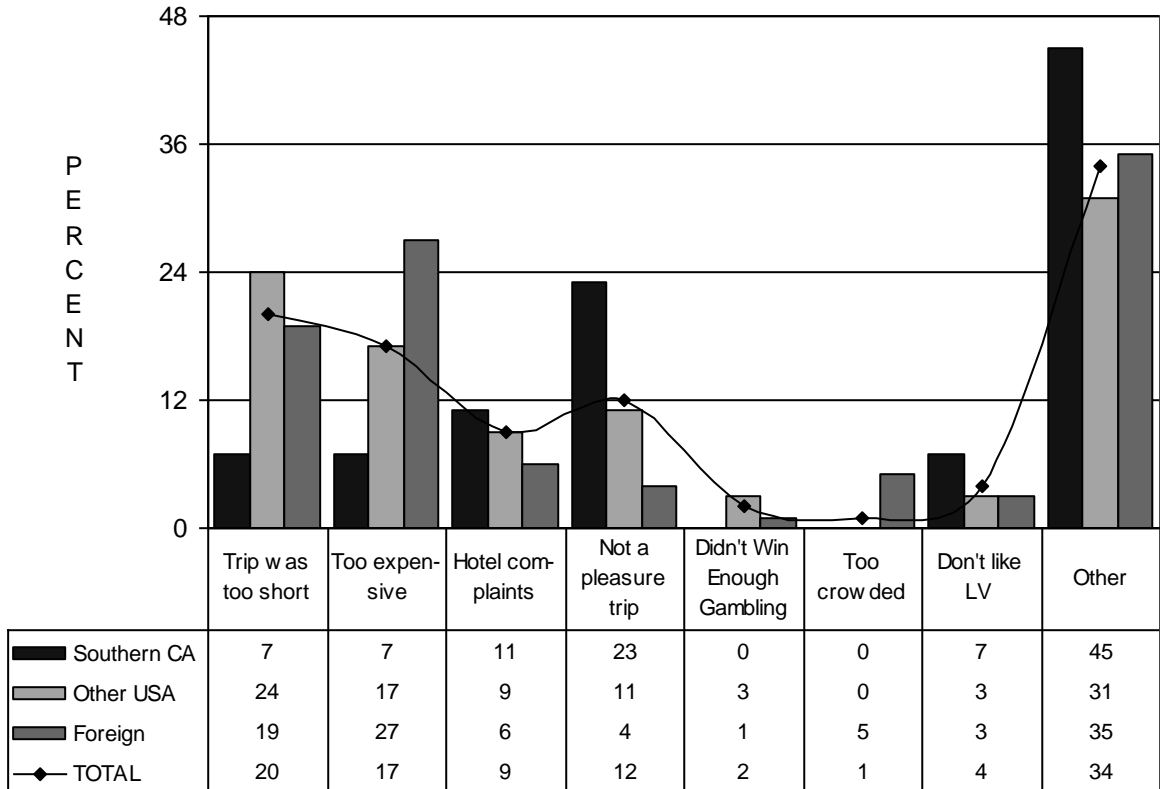
ATTITUDINAL INFORMATION

FIGURE 61
Satisfaction With Visit



Nine in ten visitors (90%) said that they were “very satisfied” with their visit to Las Vegas, while 8% said they were “somewhat satisfied.” There were no statistically differences between these visitor segments on this measure.

FIGURE 62
Why Not Completely Satisfied With Visit
(Among Those Who Were "Somewhat" Satisfied)



(Base Sizes: Southern CA=54, Other USA=186, Foreign=61, TOTAL=304)

Visitors who were not completely satisfied with their visit were asked to volunteer why. Other domestic visitors (24%) were more likely than Southern California visitors (7%) to say that the trip was too short. Southern California visitors (23%), meanwhile, were more likely than foreign visitors (4%) to say that they were in town for business, not pleasure. Foreign visitors (27%) were more likely than Southern California visitors (7%) to say that it was too expensive.

VISITOR DEMOGRAPHICS

With regards to visitor demographics, Southern California visitors were the most likely segment to:

- Have some college or a trade school education (40%).
- Be non-white (35%), particularly Hispanic/Latino (20%).
- Have an annual household income of \$80,000 or more (61%).

Other domestic visitors were the most likely segment to:

- Be 40 years old or older (61%) and have the highest mean age (46.1).
- Have an annual household income of \$40,000 to \$59,999 (14%).

Foreign visitors were the most likely segment to:

- Be single (20%).
- Be unemployed (4%) or a student (7%).
- Have an annual household income of less than \$20,000 (8%).

FIGURE 63
VISITOR DEMOGRAPHICS

	Southern California	Other USA	Foreign	TOTAL
<u>GENDER</u>				
Male	48%	51%	49%	50%
Female	52	49	51	50
<u>MARITAL STATUS</u>				
Married	77	79	77	79
Single	15	15	20	16
Separated/Divorced	7	5	2	5
Widowed	1	1	1	1
<u>EMPLOYMENT</u>				
Employed	71	69	61	68
Unemployed	1	1	4	2
Student	2	3	7	4
Retired	19	23	23	22
Homemaker	6	4	6	5
<u>EDUCATION</u>				
High school or less	17	18	21	18
Some college/trade school	40	35	29	35
College graduate	43	47	50	47
<u>AGE</u>				
21 to 29	26	16	25	20
30 to 39	24	23	21	23
40 to 49	18	20	17	19
50 to 59	10	16	14	14
60 to 64	6	5	3	5
65 or older	16	20	20	19
MEAN	43.0	46.1	44.0	45.1
BASE	(672)	(2193)	(728)	(3599)

FIGURE 64
VISITOR DEMOGRAPHICS

	Southern California	Other USA	Foreign	TOTAL
<u>ETHNICITY</u>				
White	65%	80%	81%	77%
African American/Black	12	8	1	7
Asian/Asian American	2	2	4	2
Hispanic/Latino	20	7	10	10
Other	1	3	4	3
<u>HOUSEHOLD INCOME</u>				
Less than \$20,000	2	3	8	4
\$20,000 to \$39,999	5	7	4	6
\$40,000 to \$59,999	9	14	8	12
\$60,000 to \$79,999	16	19	20	19
\$80,000 or more	61	51	44	52
Not sure/no answer	7	7	16	9
<u>VISITOR ORIGIN</u>				
<u>U.S.A.</u>	<u>0</u>	<u>100</u>	<u>0</u>	<u>80</u>
Eastern states ¹	0	11	0	7
Southern states ²	0	26	0	16
Midwestern states ³	0	16	0	10
Western states ⁴	<u>100</u>	<u>47</u>	<u>0</u>	<u>47</u>
California	100	7	0	23
Southern California	100	0	0	19
Northern California	0	7	0	4
Arizona	0	15	0	10
Other Western states	0	26	0	16
<u>Foreign</u>	<u>0</u>	<u>0</u>	<u>100</u>	<u>20</u>
BASE	(672)	(2193)	(728)	(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.