

LAS VEGAS VISITOR PROFILE

Calendar Year 2019

Generational Version

Research that works.

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GENERATIONAL VERSION

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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 2019.

Generational differences as originally defined by researchers at the Pew Research Center for the Silent Generation (those born between 1925 and 1945), Boomers (those born between 1946 and 1964), Gen X visitors (those born between 1965 and 1980) and Millennials (those born between 1981 and 1998) are the focus of this report. The tables and charts in this report show data for all visitors and for four visitor subgroups:

- **SILENT GENERATION** — 1% of all visitors.
- **BOOMERS** — 30% of all visitors.
- **GEN X** — 34% of all visitors.
- **MILLENNIALS** — 35% of all visitors.

This section presents the research highlights. The findings are presented in detail beginning on page 8.

BOOMERS

Those visitors born between 1946 and 1964 were the most likely to have:

- Used Email offers in planning their trip (21%).
- Received a casino complimentary rate for their room (24% among those staying in a hotel).

During their visit to Las Vegas Boomers spent an average of:

- \$434.38 on food and drink.
- \$206.41 on shopping.
- \$48.02 on shows and entertainment.

GEN X VISITORS

Those visitors born between 1965 and 1980 were the most likely to have:

- Been visiting Las Vegas for a convention or corporate meeting (14%).
- Paid a convention rate for their lodgings (11%).

Gen X visitors were also the most likely to:

- Be employed (91%).
- Have an income of \$80,000 or more (53%).

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

- \$446.63 on food and drink.
- \$221.19 on shopping.
- \$54.06 on shows and entertainment.

MILLENNIALS

Those visitors born between 1981 and 1996 were the most likely to have:

- Not visited Las Vegas before (34%).
- Traveled to Las Vegas via ground transportation (56%).
- Planned their trip within two weeks or less (27%).
- Used magazines or newspapers (30%) or relied on word of mouth (30%) in planning their trip.
- Lodged Downtown (8%).
- Booked their accommodations less than one week in advance (20%, among those staying in a hotel or RV park).
- The largest average number of people staying in a room (mean of 2.2 people).
- Paid a regular room rate (69%).
- People in their party under the age of 21 (8%).
- Been to other Las Vegas paid attractions (37%).

Millennials were also the most likely to:

- Be visiting from California (26%).
- Be Hispanic/Latino (15%).
- Have an income between \$20,000 and \$39,999 (16%).

During their visit to Las Vegas Millennials spent an average of:

- \$351.49 on food and drink.
- \$138.88 on shopping.
- \$51.38 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 2019. 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 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, coded 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 2019. 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 2019 study. Statistically significant differences in the behavior, attitudes, and opinions of the Silent Generation (those born between 1925 and 1945), Boomers (those born between 1946 and

1964), Gen X visitors (those born between 1965 and 1980) and Millennials (those born between 1981 and 1998) are pointed out in the text of the report. The tables and charts in this report show data for all visitors and for the four generational subgroups. In 2019, only 1% of visitors (49 individuals) were from the Silent Generation. Therefore, while their data is included, due to the small number of visitors in this subgroup statistically significant differences between the Silent Generation and members of the other subgroups are often difficult to validate even though the numerical differences may appear to be substantial.

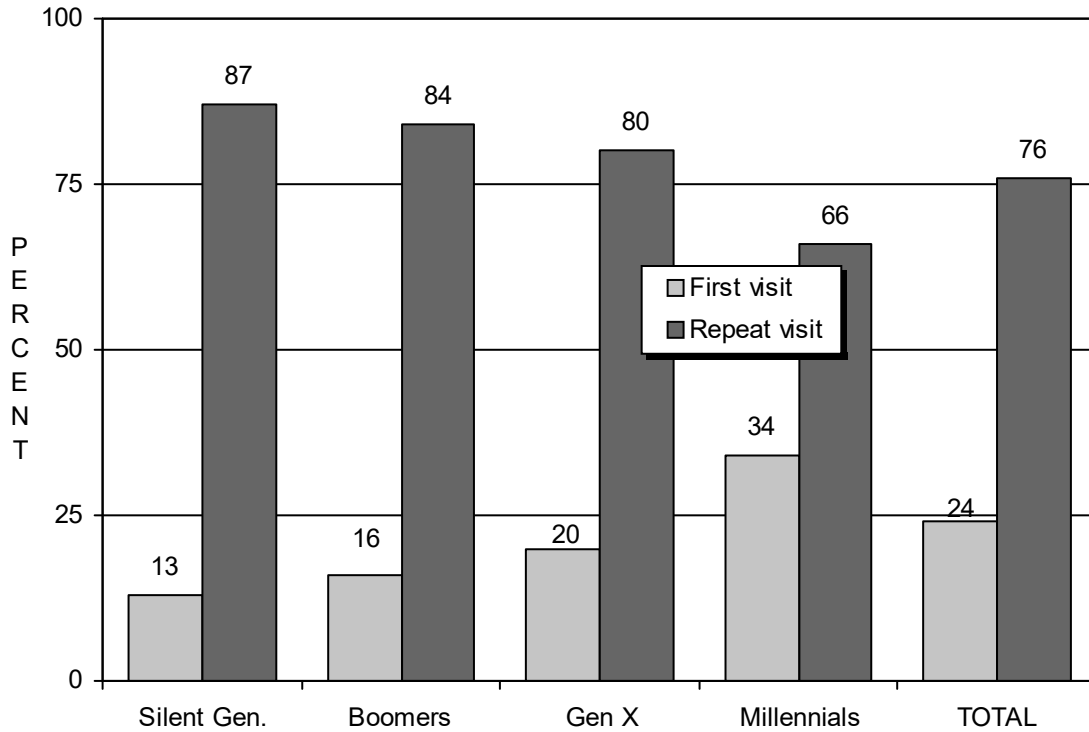
In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2019. These questions will be rotated back into the questionnaire in Calendar Year 2020 and subsequently asked every other year. These questions are noted in 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

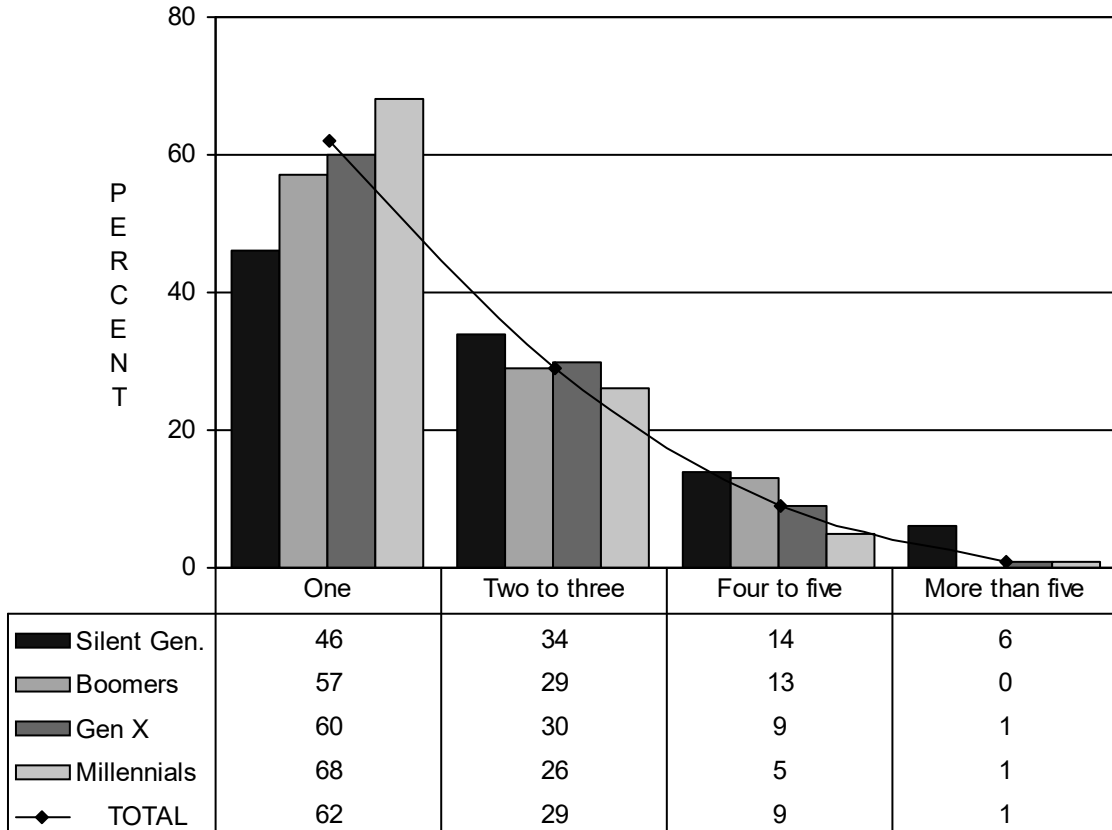
REASONS FOR VISITING

FIGURE 1
First Visit vs. Repeat Visit



Boomers (84%), Gen X visitors (80%), and the Silent Generation (87%) were all more likely than Millennials (66%) to say they had visited Las Vegas before.

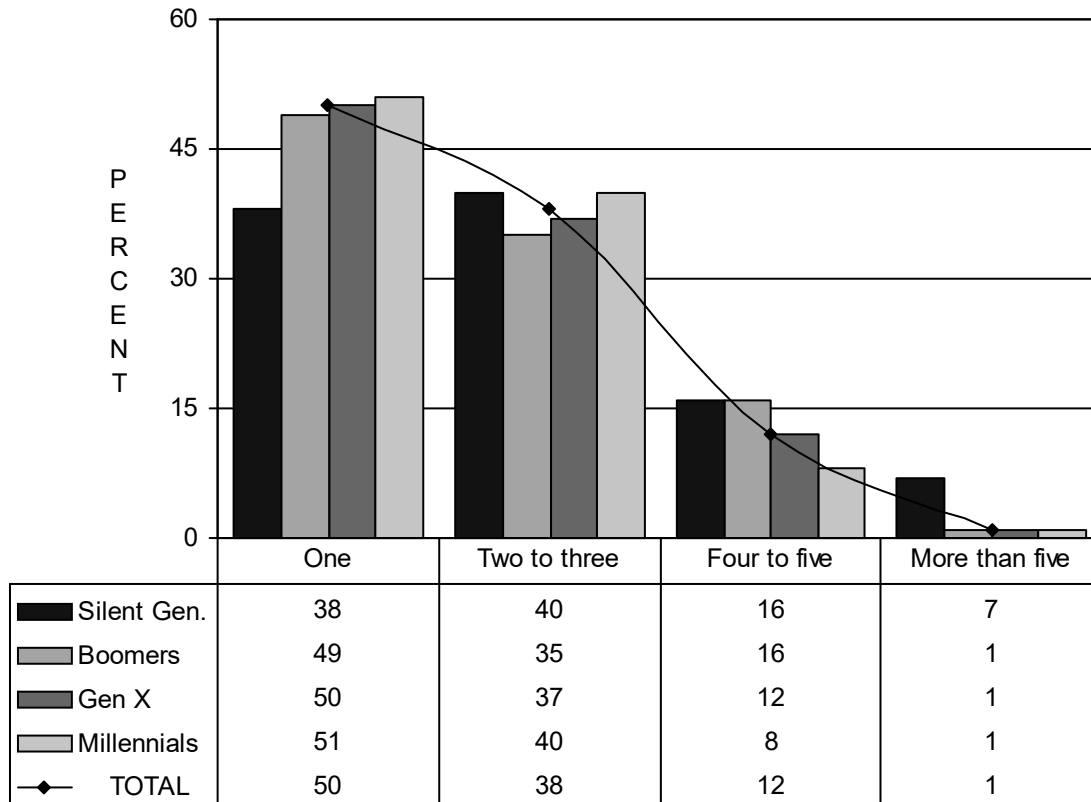
FIGURE 2
Frequency Of Visits In Past Year
(Among All Visitors)



(Means Silent Gen=2.3, Boomers=1.9, Gen X=1.7, Millennials=1.6, TOTAL=1.7)

Millennials (68%) were the most likely segment to have visited Las Vegas just once within the past 12 months. The average number of visits during the past year was the lowest for Millennials (1.6 visits).

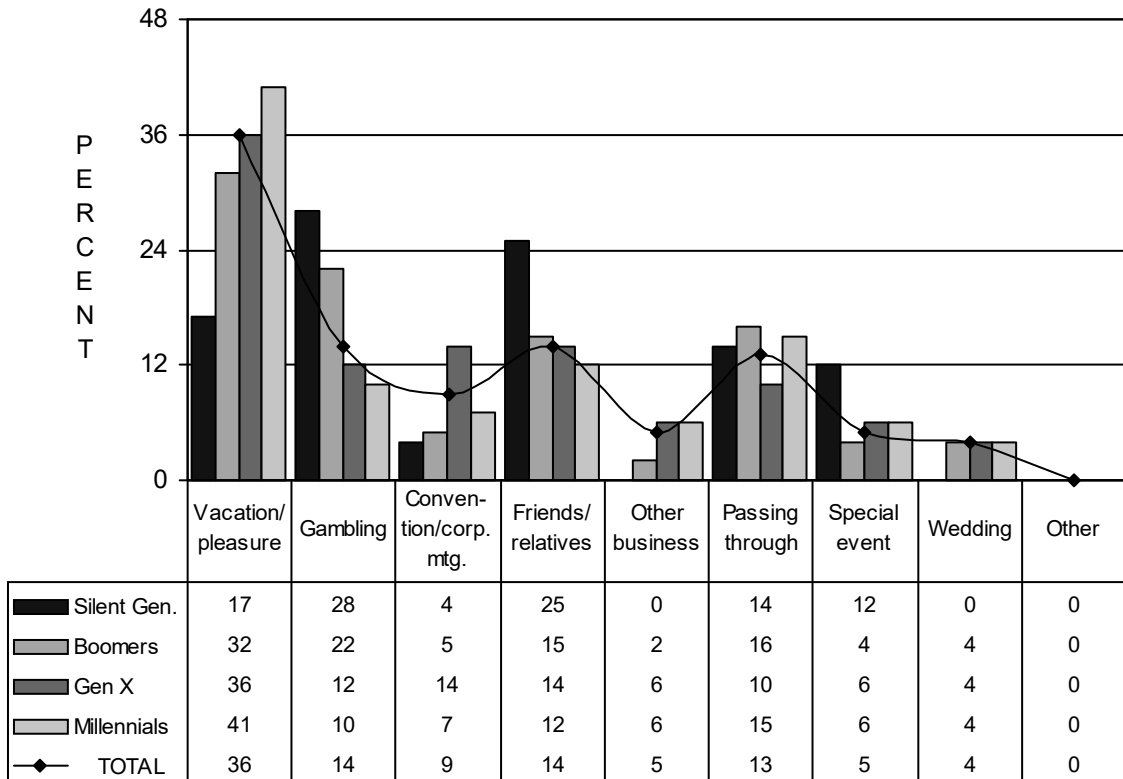
FIGURE 3
Frequency Of Visits In Past Year
(Among Repeat Visitors)



(Base Sizes: Silent Gen=43, Boomers=894, Gen X=971, Millennials=837, TOTAL=2748)
(Means: Silent Gen=2.5, Boomers=2.0, Gen X=1.9, Millennials=1.9, TOTAL=2.0)

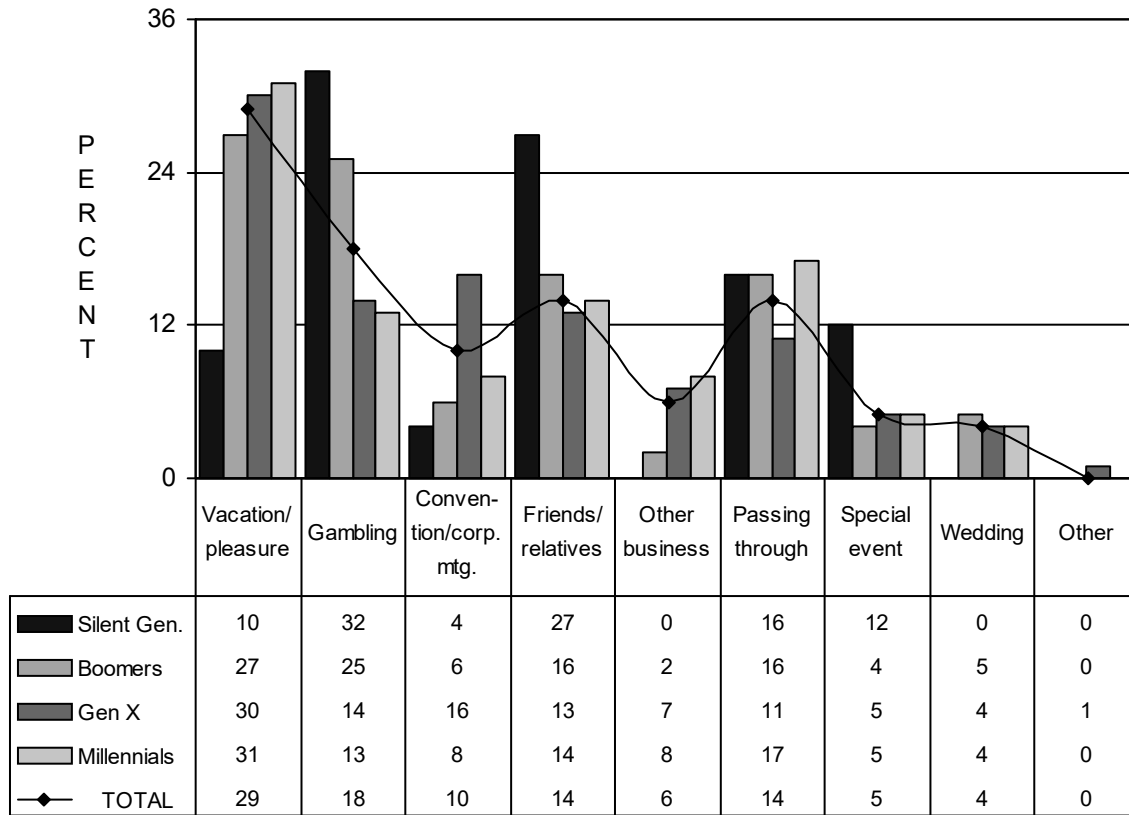
Looking at the frequency of visits in the past year among returning visitors, Boomers (16%) were more likely than Millennials (8%) to have visited four to five times. There were no statistically significant differences in the average number of visits between any of these segments.

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



Looking at the primary purpose of the current visit among all visitors, Millennials (41%) were the most likely segment to say they were visiting Las Vegas for vacation or pleasure while the silent generation (17%) was the least likely segment to give this response. Silent Generation (28%) and Boomers (22%) were more likely to say they came to Las Vegas primarily to gamble than Gen X visitors (12%) and Millennials (10%). Gen X visitors (14%) were the most likely segment to say they traveled to Las Vegas primarily for a convention or corporate meeting.

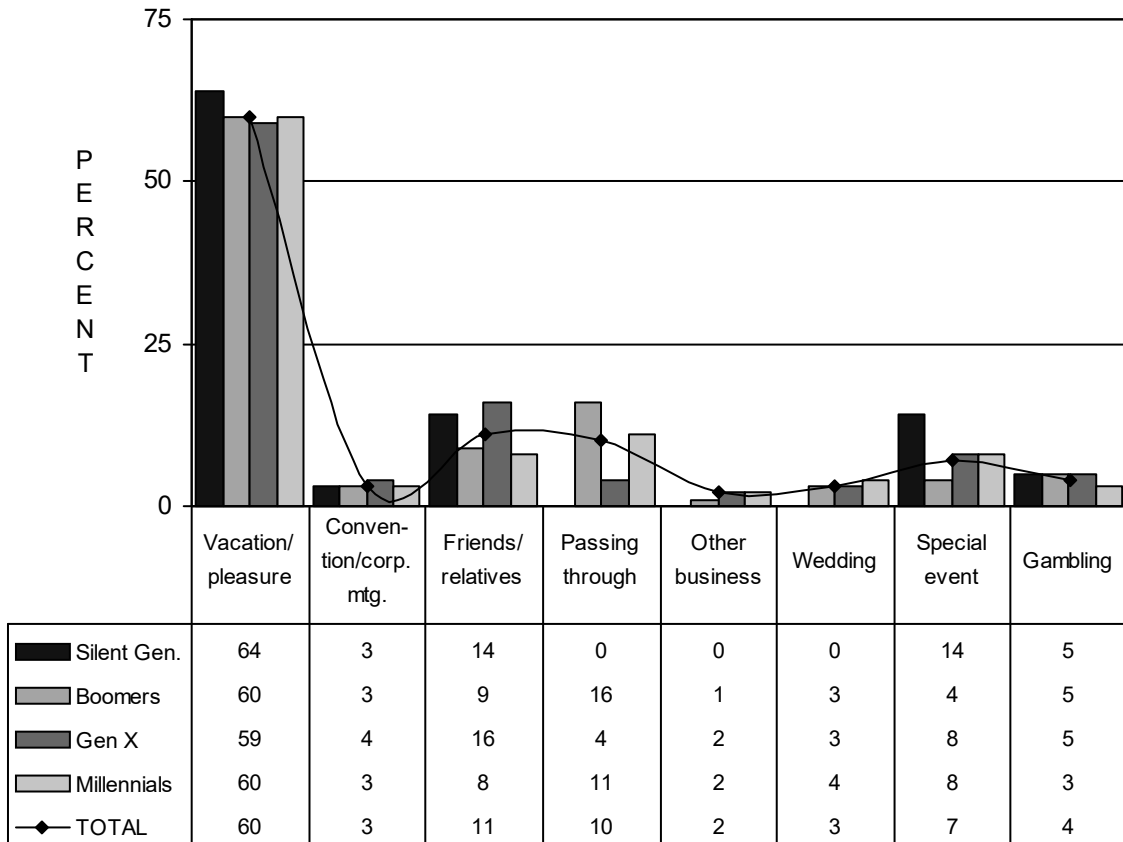
FIGURE 5
Primary Purpose Of Current Visit
(Among Repeat Visitors)



(Base Sizes: Silent Gen=43, Boomers=894, Gen X=971, Millennials=837, TOTAL=2748)

Looking at the primary purpose of the current visit among repeat visitors, Silent Generation (32%) and Boomers (25%) were more likely to say they came to Las Vegas primarily to gamble than Gen X visitors (14%) and Millennials (13%). Gen X visitors (16%) were the most likely segment to say they traveled to Las Vegas primarily for a convention or corporate meeting.

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

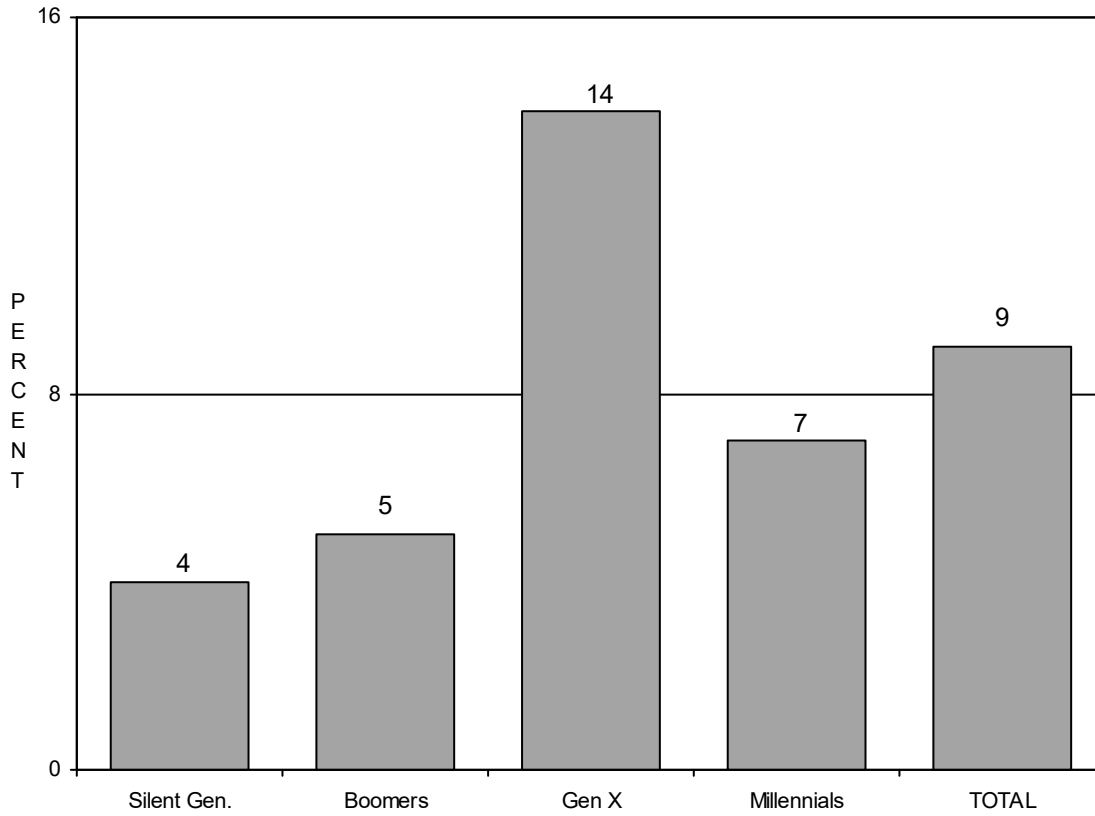


(Base Sizes: Silent Gen=7*, Boomers=168, Gen X=247, Millennials=429, TOTAL=851)

We also looked at what first-time visitors to Las Vegas said was the purpose of their current visit. Overall, six in ten (60%) of all first-time visitors said they were visiting Las Vegas for vacation or pleasure. Gen X visitors (16%) were more likely than Millennials (8%) to say they were visiting friends or relatives.

* Note the very small base size for Silent Generation.

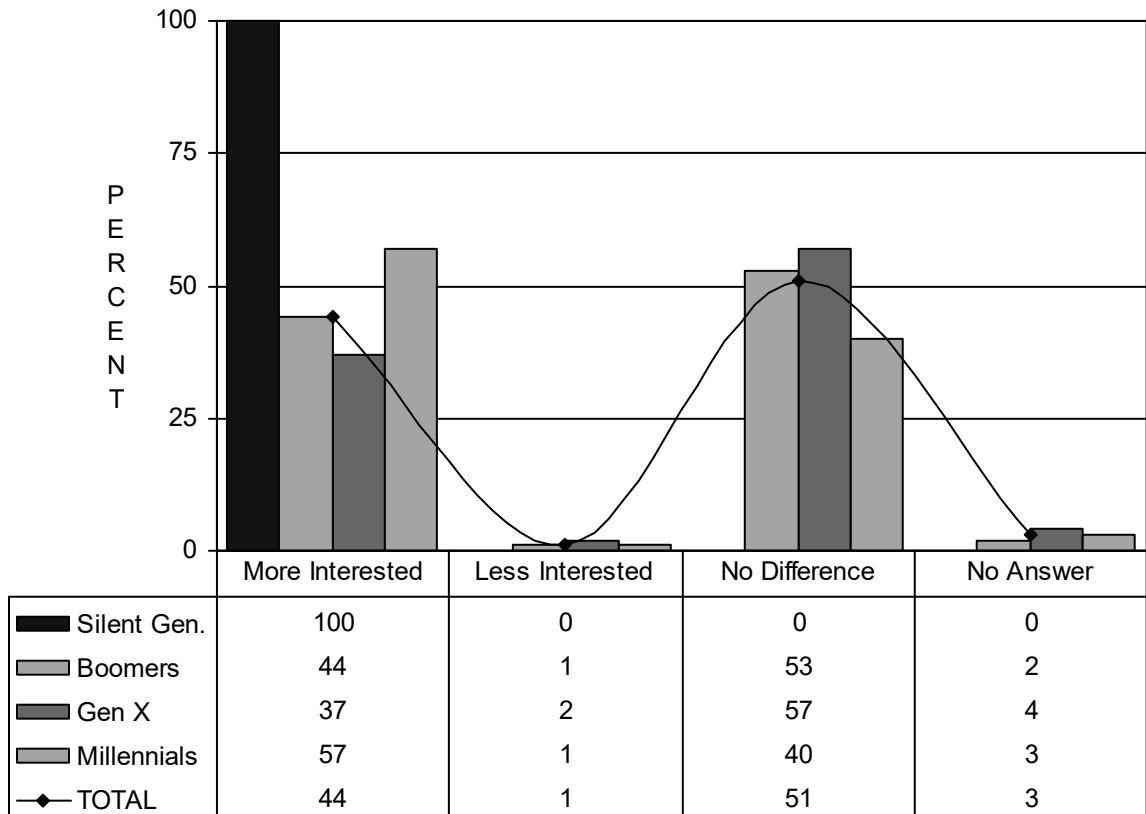
FIGURE 7
Conventions/Trade Shows/Associations/Corporate Meetings



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 and 9% said they had. Gen X visitors (14%) were the most likely segment to say they had participated in or attended a convention, trade show, association or corporate meeting.

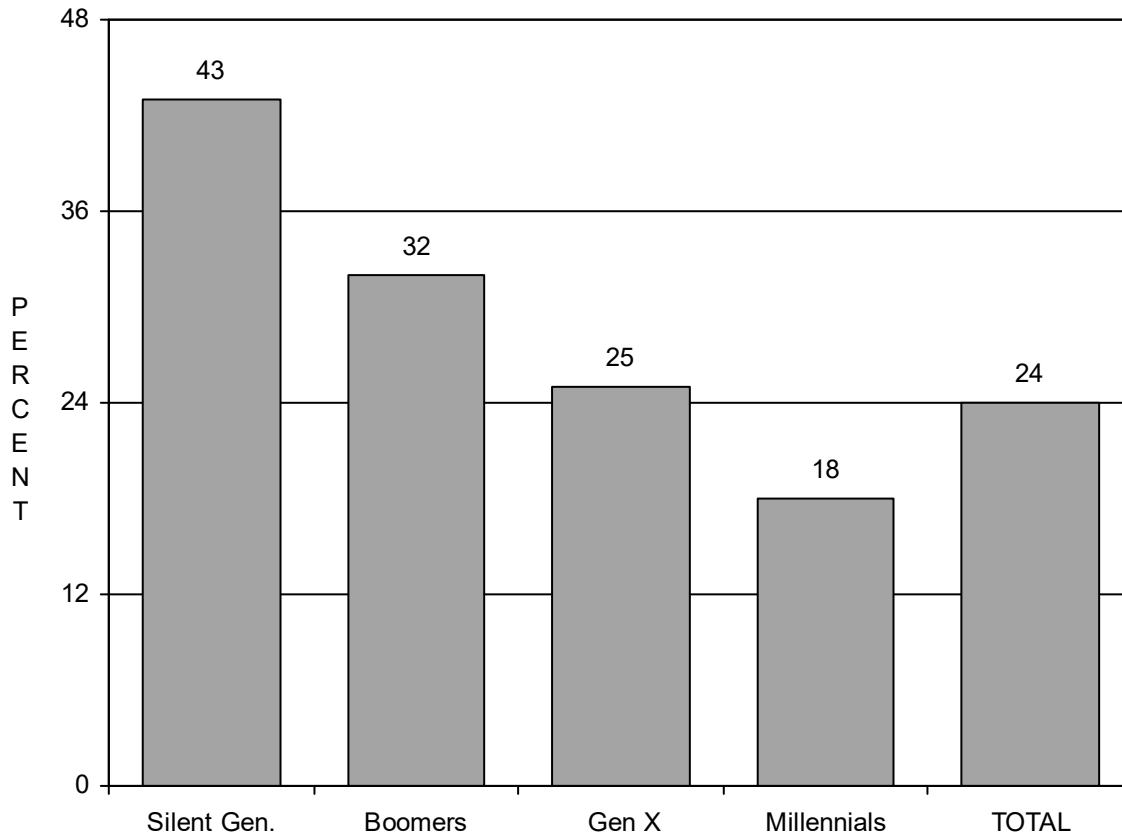
FIGURE 8
Interest In Attending Conventions, Trade Shows, Associations Or
Corporate Meetings In Las Vegas
(Among Visitors Who Attended A Convention,
Trade Show, Association Or Corporate Meeting)



(Base Sizes: Silent Gen=2*, Boomers=56, Gen X=171, Millennials=85, TOTAL=313)

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. Forty-four percent (44%) of all visitors said it would make them more interested in attending while 51% said it would make no difference. Convention visitors who were Millennials (57%) were more likely than Gen X visitors (37%) to say they were more interested in attending while Gen X convention visitors (57%) were more likely than Millennials (40%) to say it made no difference to them.

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: Silent Gen=2*, Boomers=56, Gen X=171, Millennials=85, TOTAL=313)

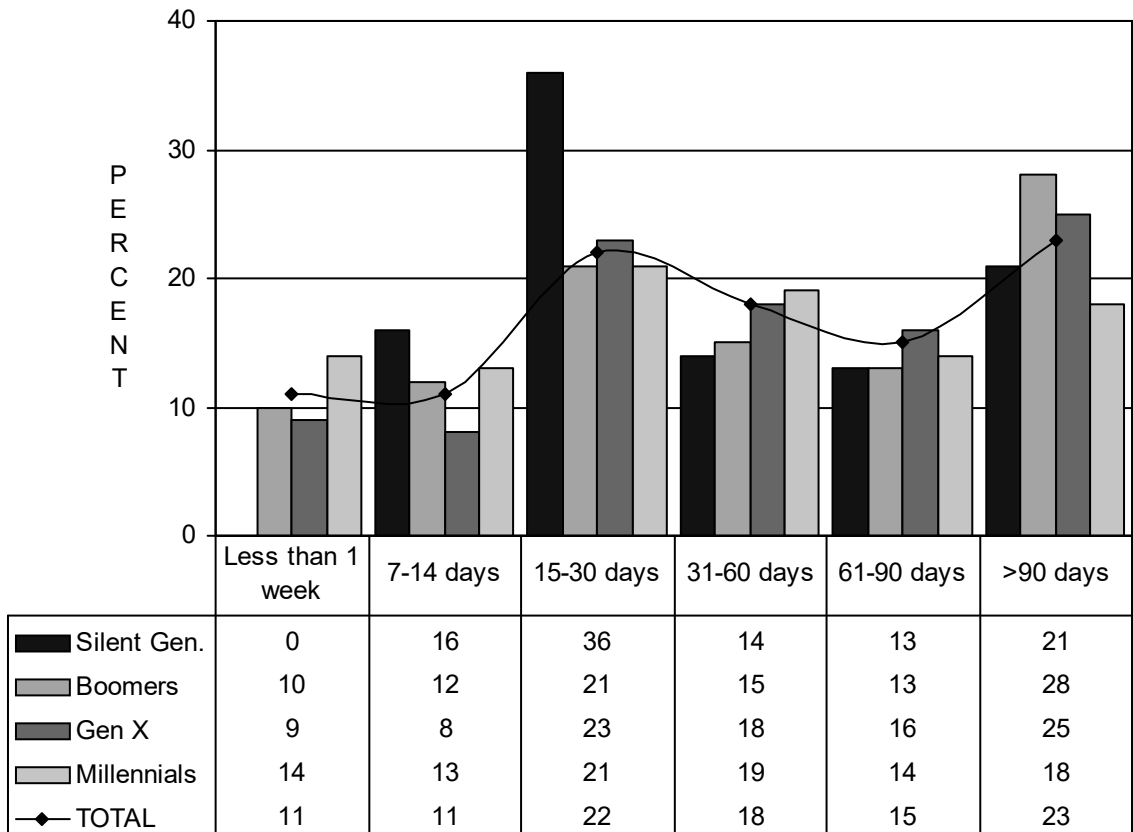
Only "yes" responses are reported in this figure.

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-four percent (24%) said they had with no statistically significant differences between these segments.

* Note the very small base size for Silent Generation.

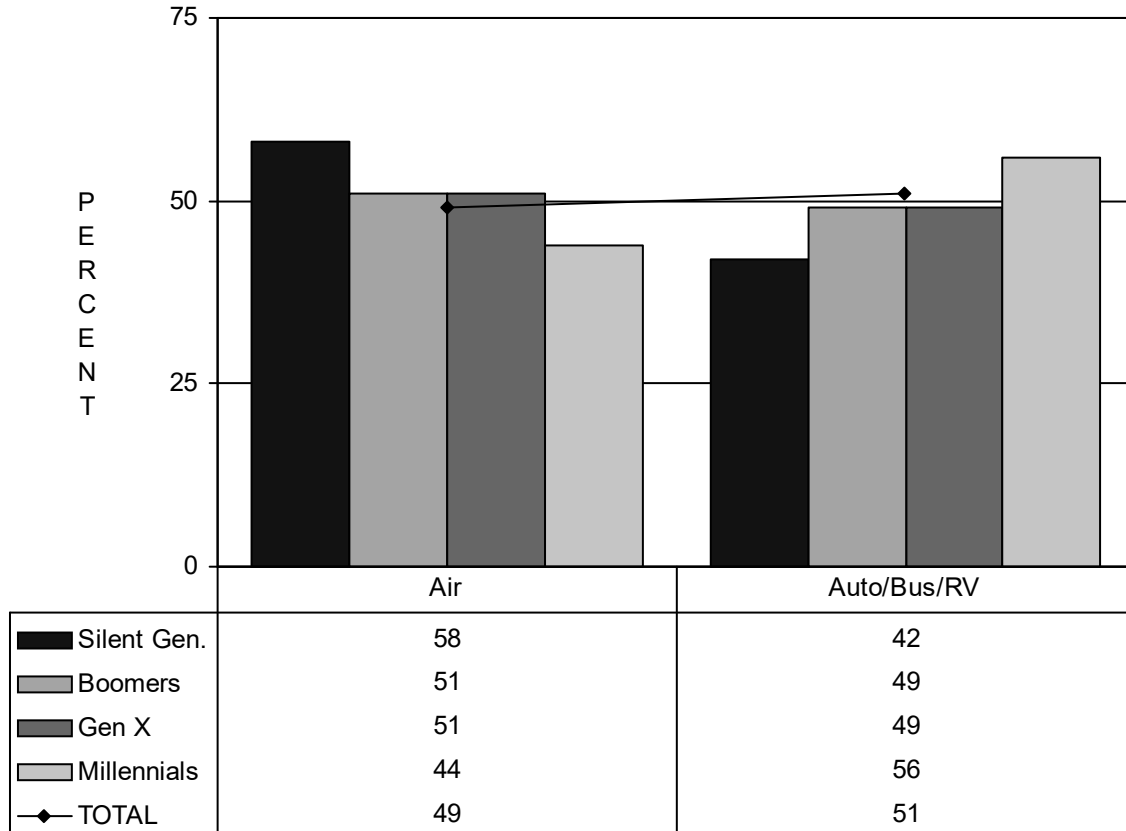
TRAVEL PLANNING

FIGURE 10
Advance Travel Planning



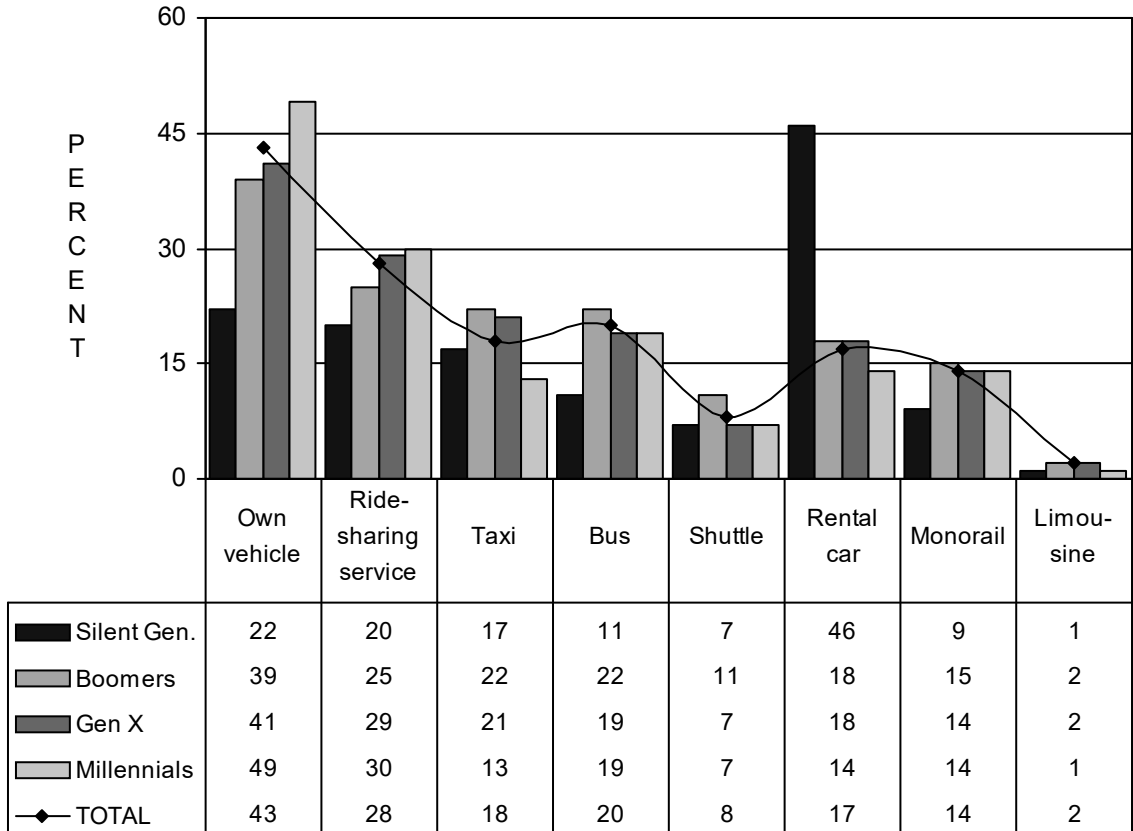
Visitors tended to plan their trips with more than one month of lead time. Over one-half (56%) of visitors said that they planned their trip more than one month in advance while one-third (33%) said they planned it one week to one month in advance. Boomers (28%) and Gen X visitors (25%) were both more likely than Millennials (18%) to say they planned their trip more than 90 days in advance, while Millennials (14%), were the most likely segment to say they planned their trip less than one week in advance.

FIGURE 11
Transportation To Las Vegas



Forty-nine percent (49%) of all visitors said they traveled to Las Vegas by air while 51% said that they took ground transportation. Millennials (56%) were the mostly likely segment to have used ground transportation and the least likely segment to travel via air (44%).

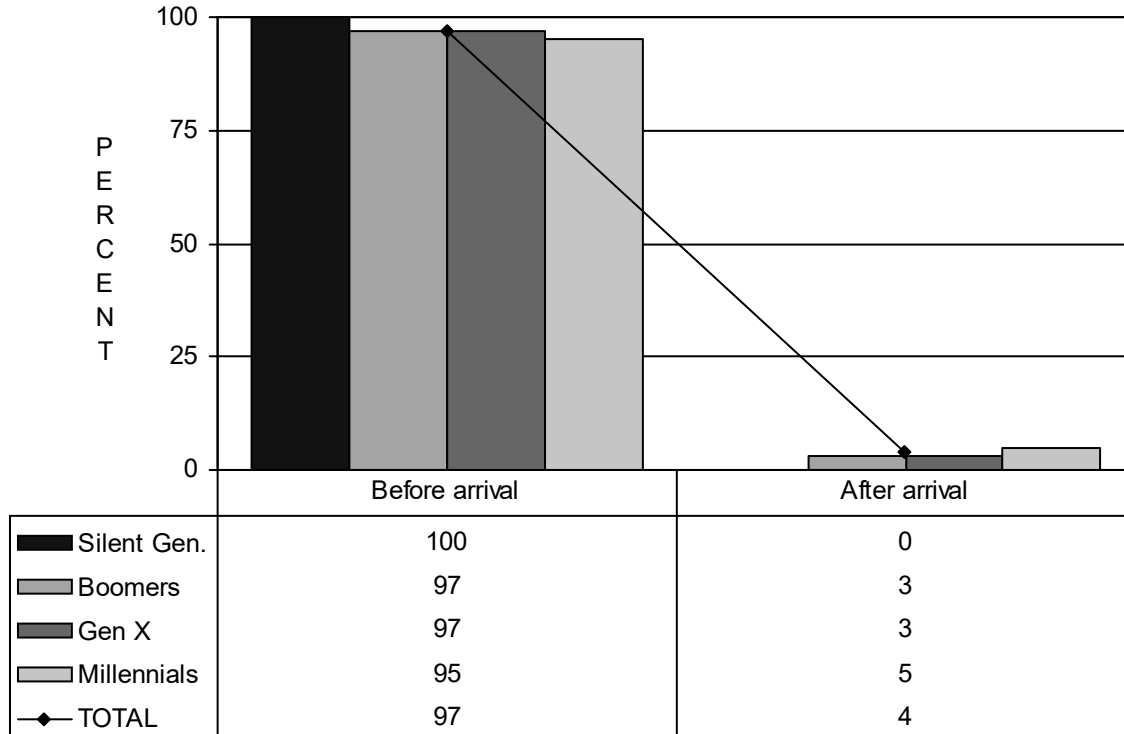
FIGURE 12
Local Transportation



Multiple responses permitted

Visitors were asked what types of local transportation they had used while in Las Vegas. Millennials (49%) were the most likely segment to have used their own vehicles while the Silent Generation (22%) were the least likely segment to do so. Millennials (30%) were also more likely than Boomers (25%) to have used a ride-sharing service. Gen X visitors (21%) and Boomers (22%) were both more likely than Millennials (13%) to have used a taxi. Silent Generation visitors (46%) were the most likely segment to have used a rental car.

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

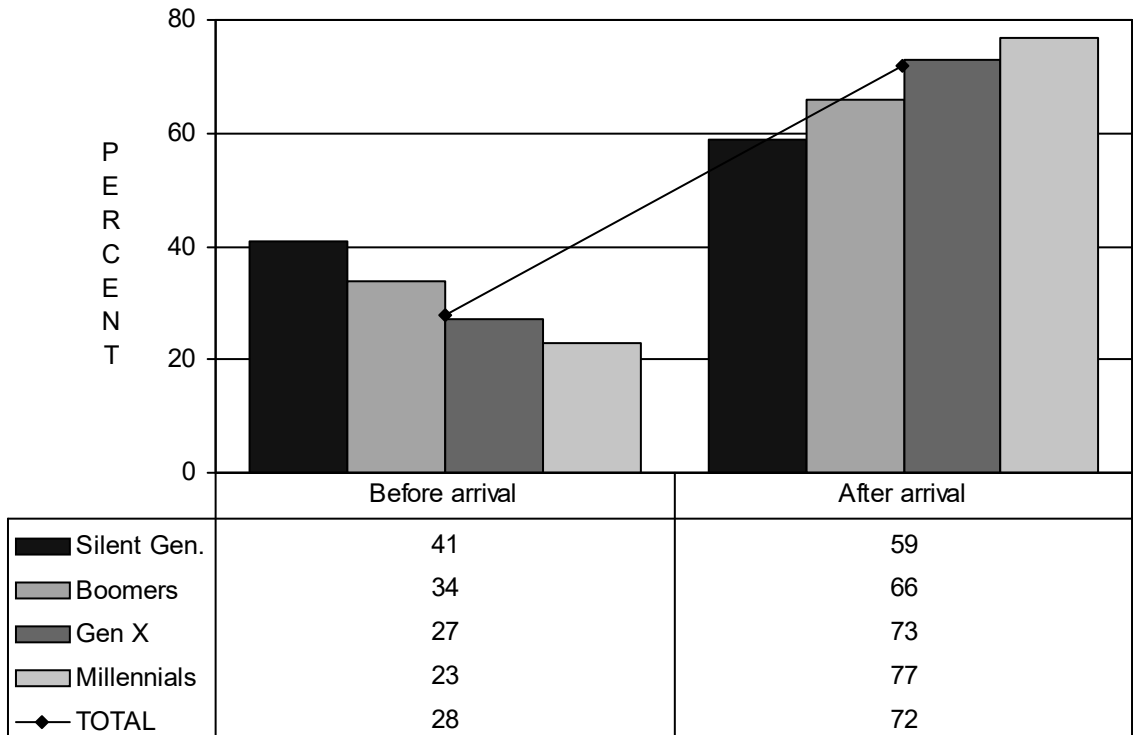


(Base Sizes: Silent Gen=42, Boomers=1083, Gen X=1103, Millennials=1357, TOTAL=3584)

Among visitors who lodged overnight in Las Vegas, the vast majority (97%) decided where to stay before arriving in Las Vegas. All members of the Silent Generation (100%) did so, while Boomers and Gen X Visitors (97%) were also more likely than Millennials (95%) to do so. Millennials (5%) were the most likely segment to say they did not decide where to stay until after they arrived in Las Vegas.

* These results are from 2018. This question is asked every other year and was not asked in 2019.

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

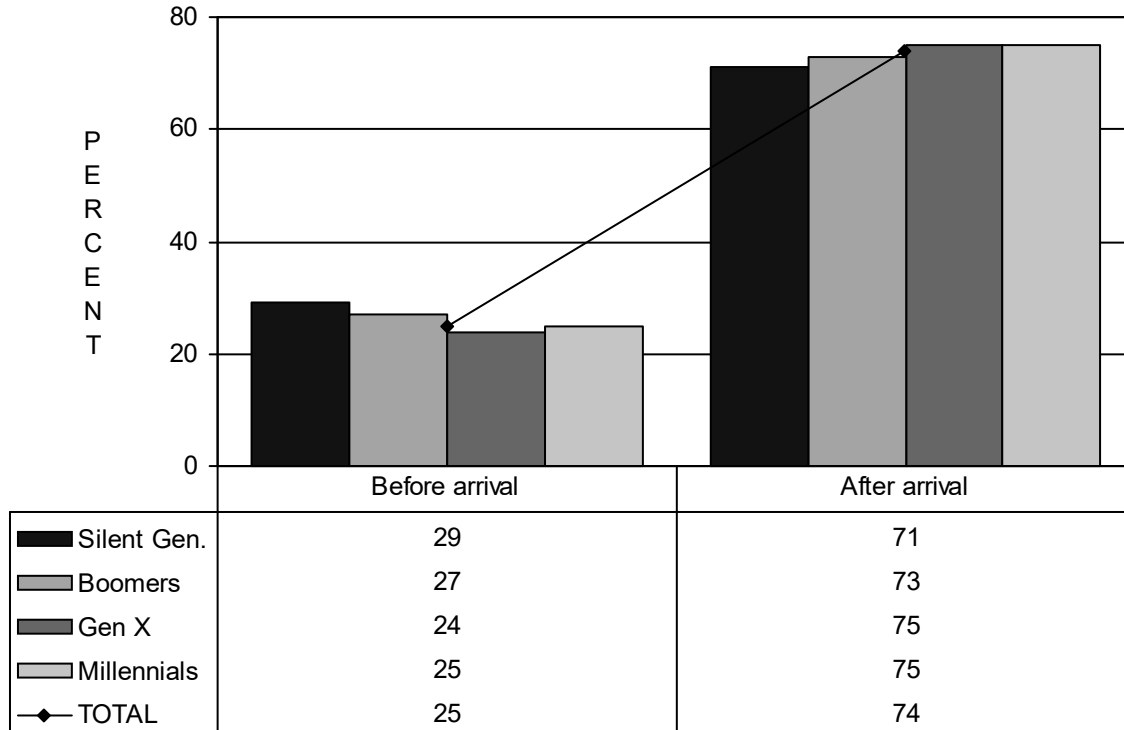


(Base Sizes: Silent Gen=33, Boomers=837, Gen X=832, Millennials=977, TOTAL=2679)

Among visitors who gambled while in Las Vegas, 28% said they decided where to gamble before leaving home, while 72% said they decided after their arrival. Boomers (34%) were more likely than Gen X visitors (27%) and Millennials (23%) to say they decided where to gamble before arriving in Las Vegas.

* These results are from 2018. This question is asked every other year and was not asked in 2019.

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

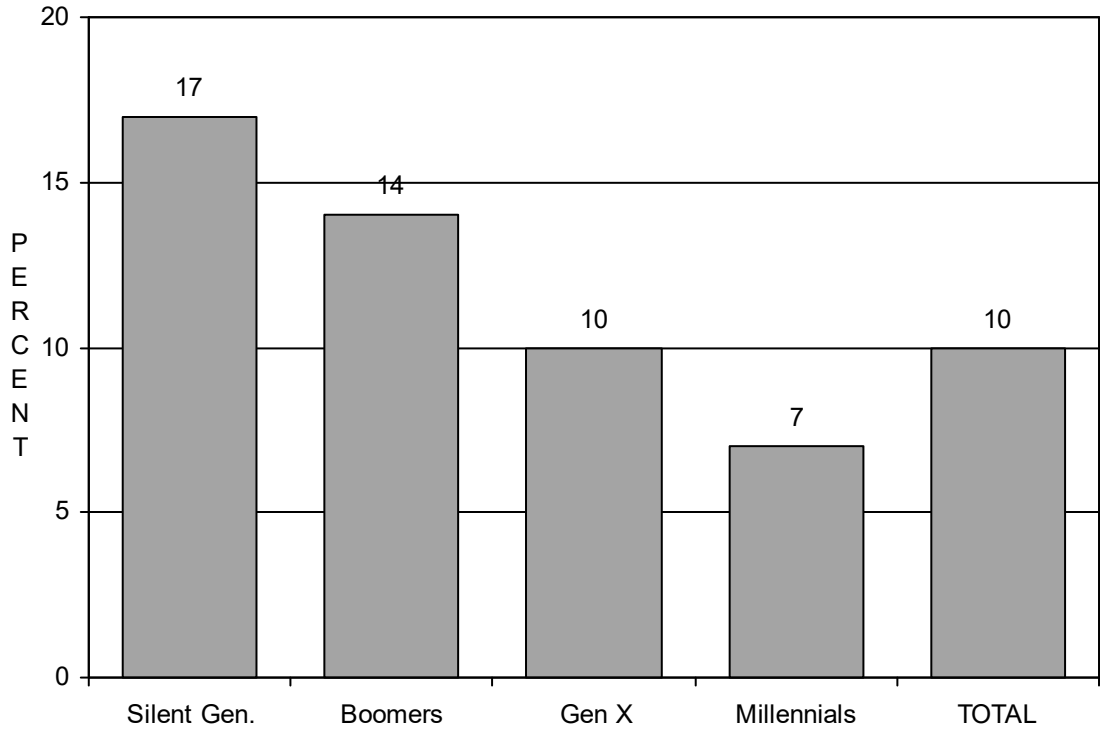


(Base Sizes: Silent Gen=17*, Boomers=599, Gen X=641, Millennials=839, TOTAL=2096)

Among visitors who saw shows while in Las Vegas, three-quarters (74%) said they decided which shows to see after their arrival, while one in four (25%) said they decided before arriving in Las Vegas. There were no differences among the four generational subgroups on this measure.

* These results are from 2018. This question is asked every other year and was not asked in 2019. Note the very small base size for the Silent Generation

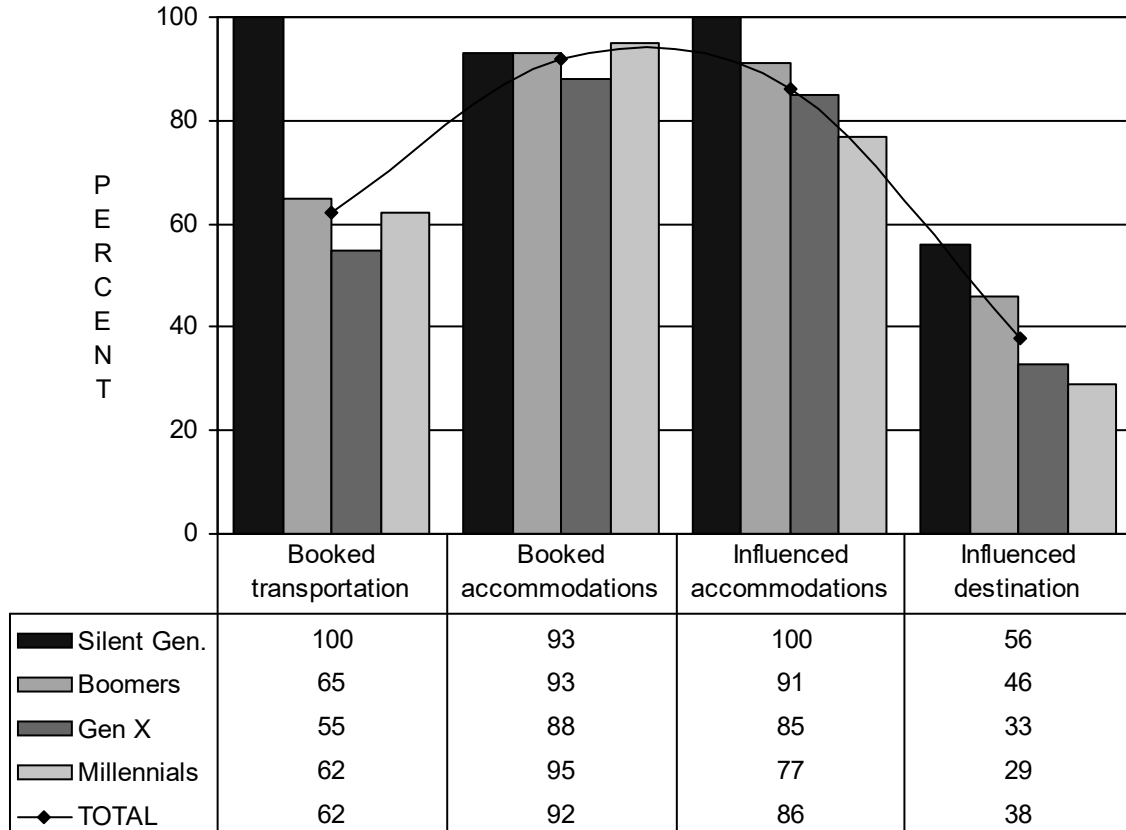
FIGURE 16
Travel Agent Assistance



Only "yes" responses are reported in this figure.

Ten percent (10%) of all visitors said they used a travel agent to help plan their trip to Las Vegas. Boomers (14%) were more likely than Gen X visitors (10%) and Millennials (7%) to have used a travel agent.

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

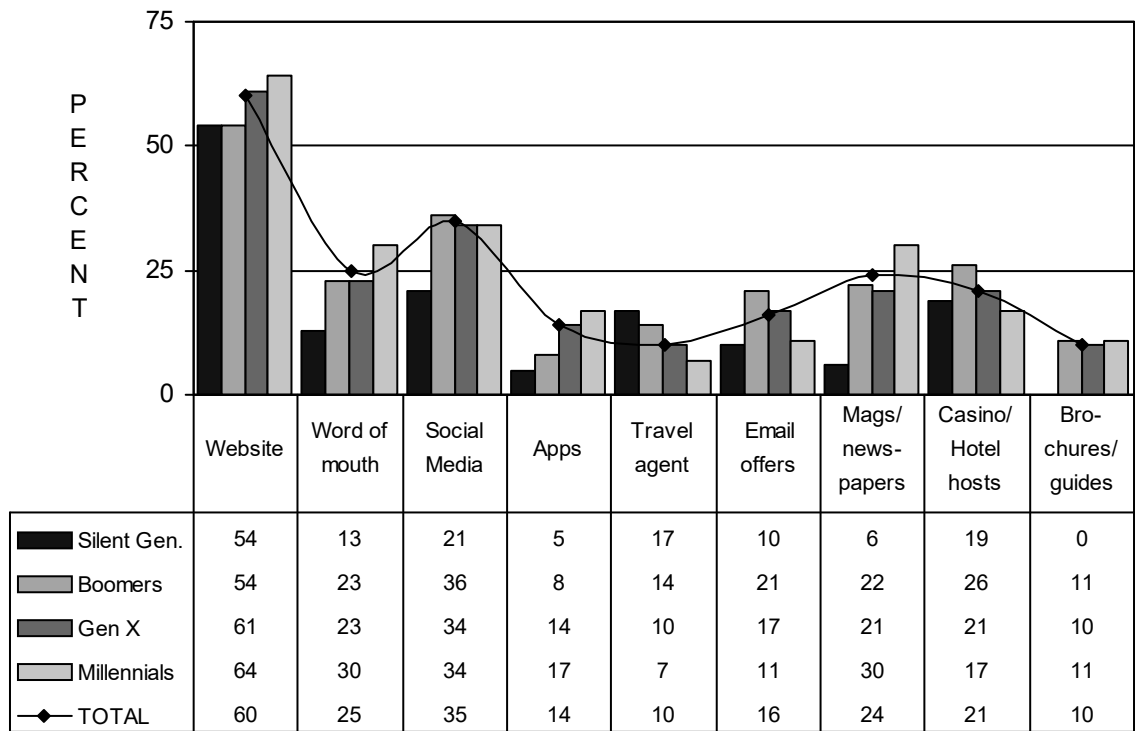


Multiple responses permitted
(Base Sizes: Silent Gen=8*, Boomers=151, Gen X=122, Millennials=86, TOTAL=367)

Among those visitors who used a travel agent to plan their trip to Las Vegas, over nine in ten (92%) said the travel agent booked their accommodations, while six in ten (62%) said the agent booked their transportation and nearly nine in ten (86%) said the agent influenced their choice of accommodations. Boomers were more likely than Millennials to say that the travel agent influenced their choice of accommodations (91% vs. 77%) and/or their destination (46% vs. 29%).

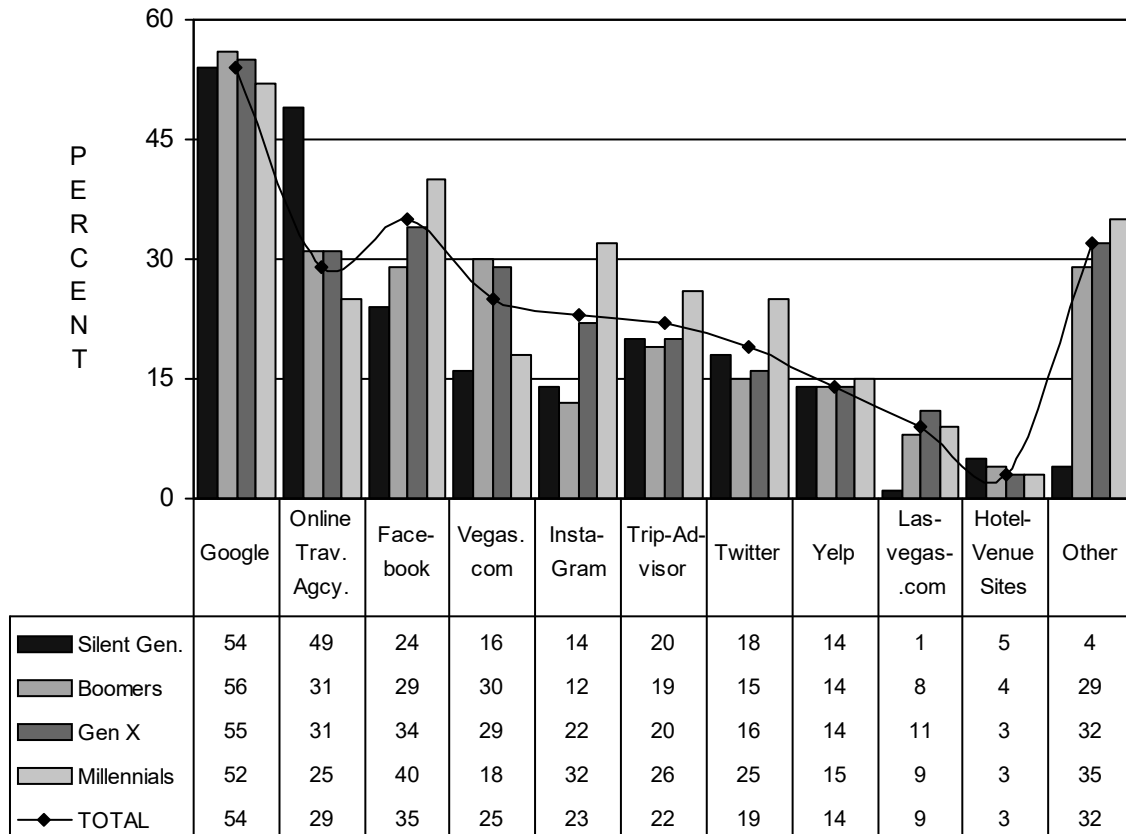
* Note the very small base size for the Silent Generation.

FIGURE 18
Tools Used In Planning Trip To Las Vegas



Visitors were asked if there were any particular tools they used to help plan their trip to Las Vegas. Millennials were the most likely segment to use word of mouth (30%) and/or magazines or newspapers (30%), and were also more likely than Boomers and the Silent Generation (17% vs. 8% and 5% respectively) to use apps in planning their trip. The Silent Generation were the least likely segment to use social media (21%), magazines or newspapers (6%), or printed brochures or travel guides (less than 1%). Boomers were the most likely segment to use email offers (21%) and were more likely than Gen X visitors and Millennials to use a travel agent (14% vs. 10% and 7% respectively) and/or casino/hotel hosts (26% vs. 21% and 17% respectively). Both Millennials (64%) and Gen X visitors (61%) were more likely than Boomers (54%) to use a website.

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

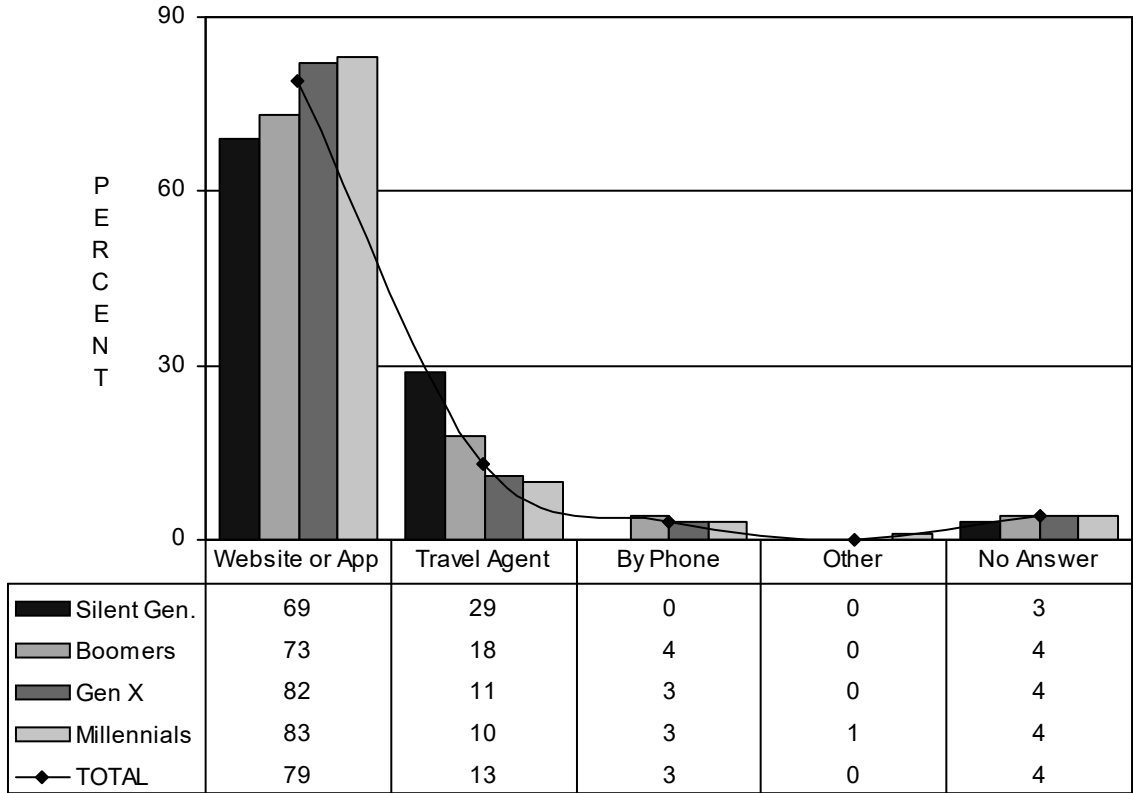


Multiple responses permitted
(Base Sizes: Silent Gen=29, Boomers=657, Gen X=869, Millennials=907, TOTAL=2464)

Among those visitors who said they used websites, social media platforms, or apps to plan their trip, over one-half (54%) said they used Google, over one-third (35%) used Facebook, and three in ten (29%) said they consulted reviews at online travel agencies.

Millennials were the most likely segment to use Instagram (32%) and the least likely segment to use reviews at online travel agencies (25%). Millennials were also more likely than both Gen X visitors and Boomers to say they used Facebook (40% vs. 34% and 29% respectively), TripAdvisor (26% vs. 20% and 19%), and Twitter (25% vs. 16% and 15%).

FIGURE 20
How Booked Flight To Las Vegas
(Among Those Who Arrived In Las Vegas By Air)

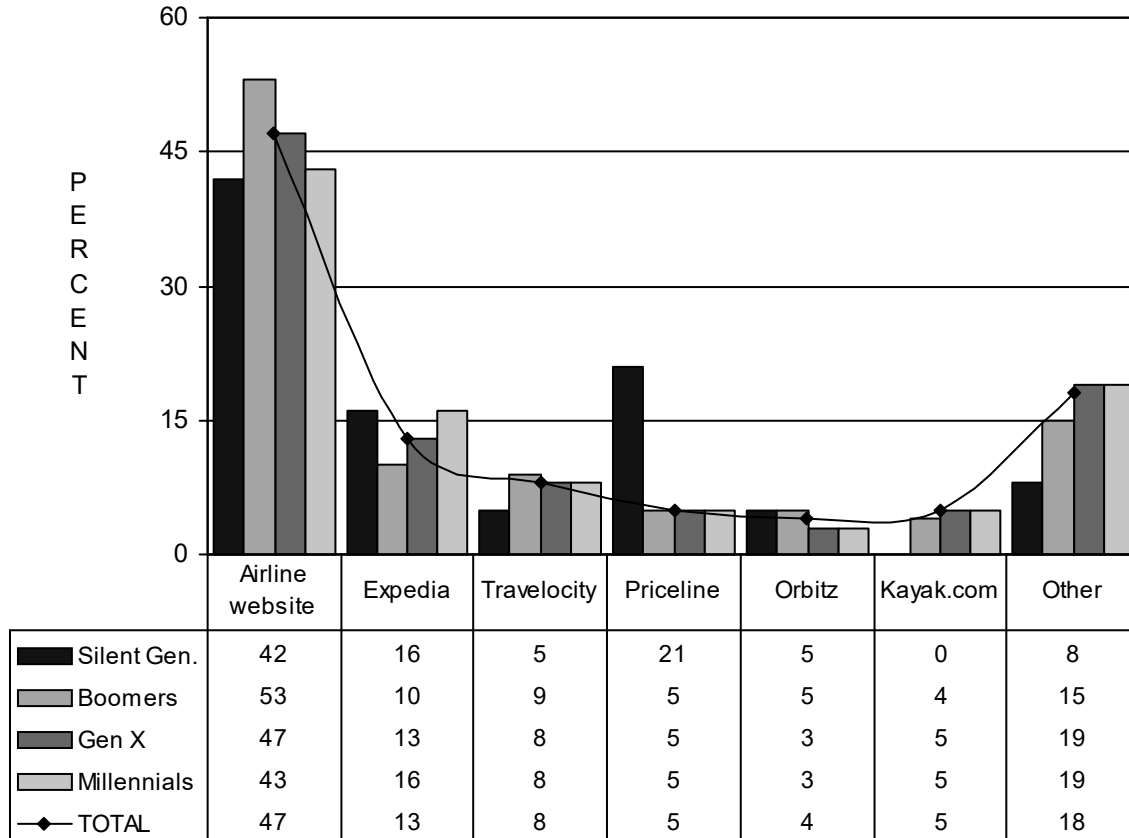


(Base Sizes Silent Gen=29, Boomers=542, Gen X=619, Millennials=560, TOTAL=1752)

Visitors who arrived in Las Vegas by air were asked how they booked their flight. Eight in ten (79%) visitors said they used a website or app, while 13% said they used a travel agent and 3% said they booked it by phone. Millennials (83%) and Gen X visitors (82%) were both more likely than Boomers (73%) to say they used a website or app. Boomers (18%) were more likely than Gen X visitors (11%) and Millennials (10%) to say they used a travel agent.

FIGURE 21
Website Or App Used To Book Flight*

(Among Those Who Used A Website Or App
To Book Their Flight To Las Vegas)

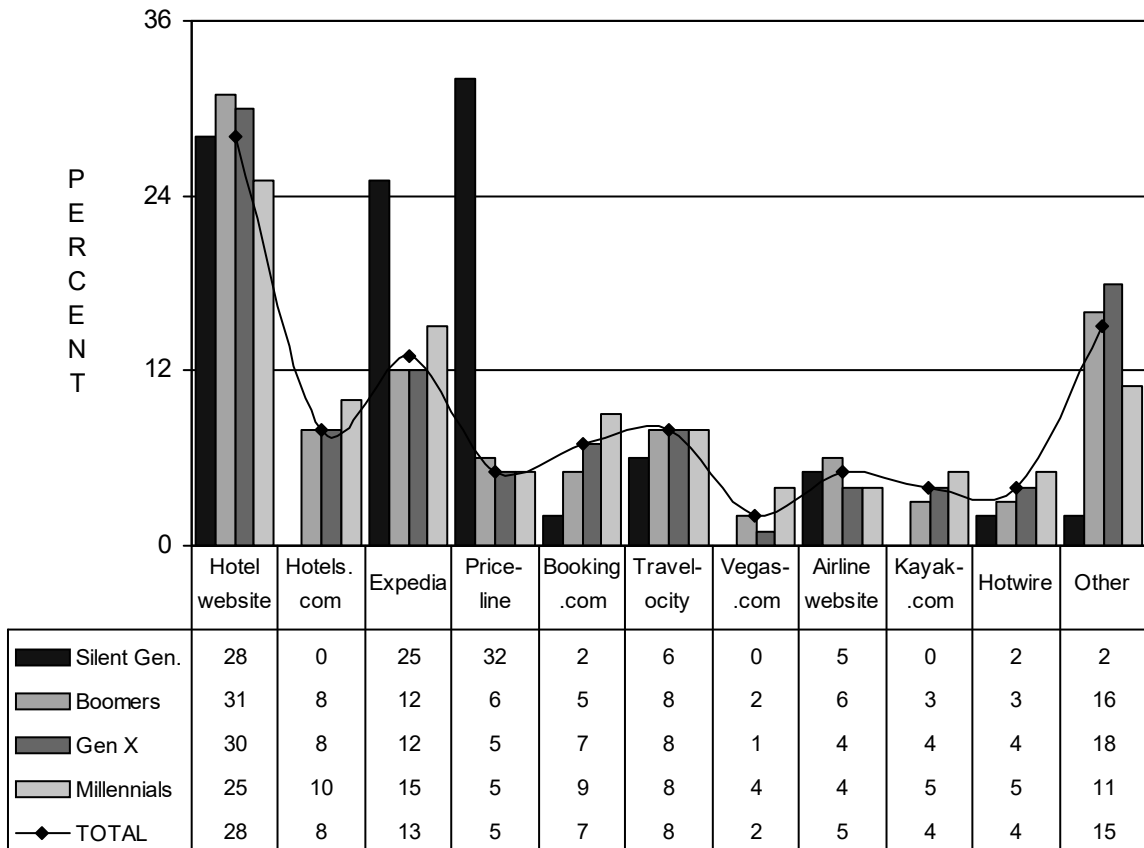


(Base Sizes Silent Gen=20*, Boomers=398, Gen X=508, Millennials=463, TOTAL=1389)

Among those visitors who booked their transportation to Las Vegas on the Internet, about one-half (47%) used an airline website and 13% used Expedia. Boomers (53%) were more likely than Gen X visitors (47%) and Millennials (43%) to have used an airline website. Millennials (16%) were more likely than Boomers (10%) to have used Expedia.

* Note the very small base size for the Silent Generation.

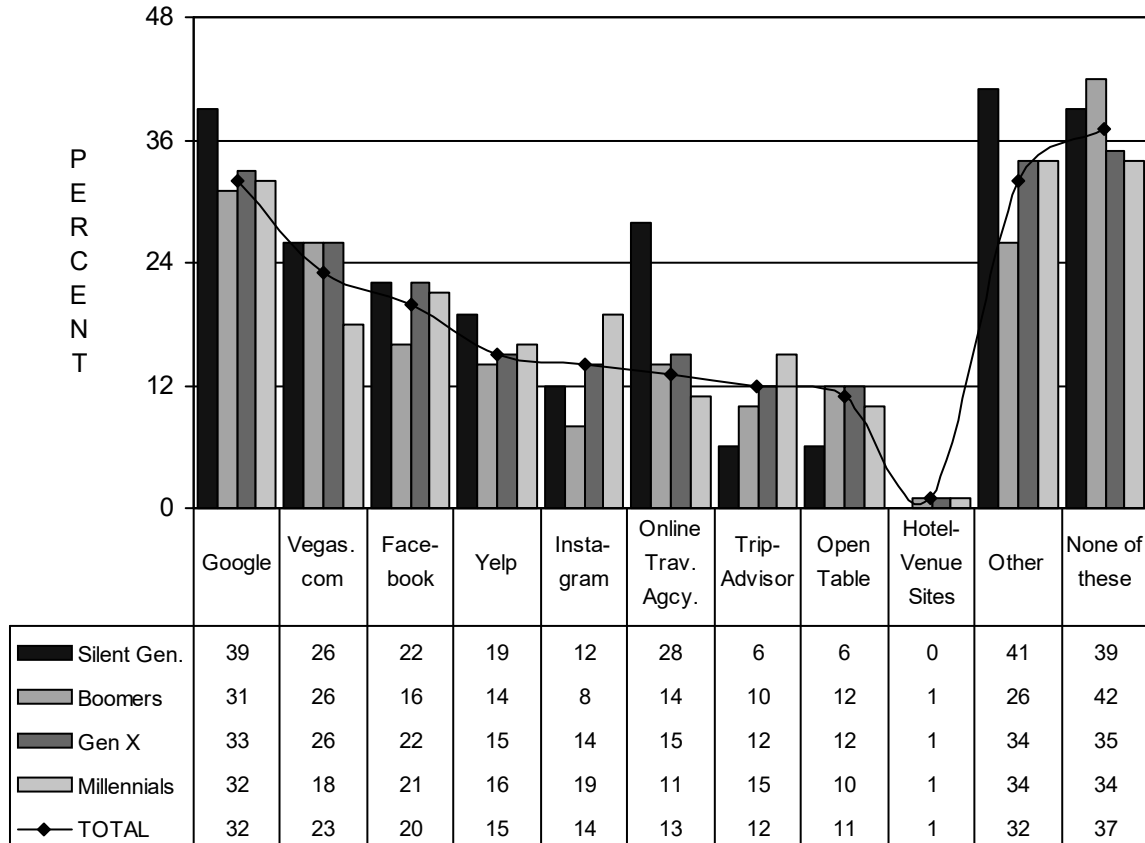
FIGURE 22
Website Or App Used To Book Accommodations
(Among Those Who Used The Internet
To Book Their Accommodations In Las Vegas)



(Base Sizes: Silent Gen=22, Boomers=411, Gen X=674, Millennials=678, TOTAL=1788)

Among those visitors who booked their accommodations in Las Vegas over the Internet, nearly three in ten (28%) used a hotel website and 13% used Expedia. Overall, Millennials (64%) were more likely than Gen X visitors (57%) and Boomers (54%) to use one of the online travel agents to book their accommodations.

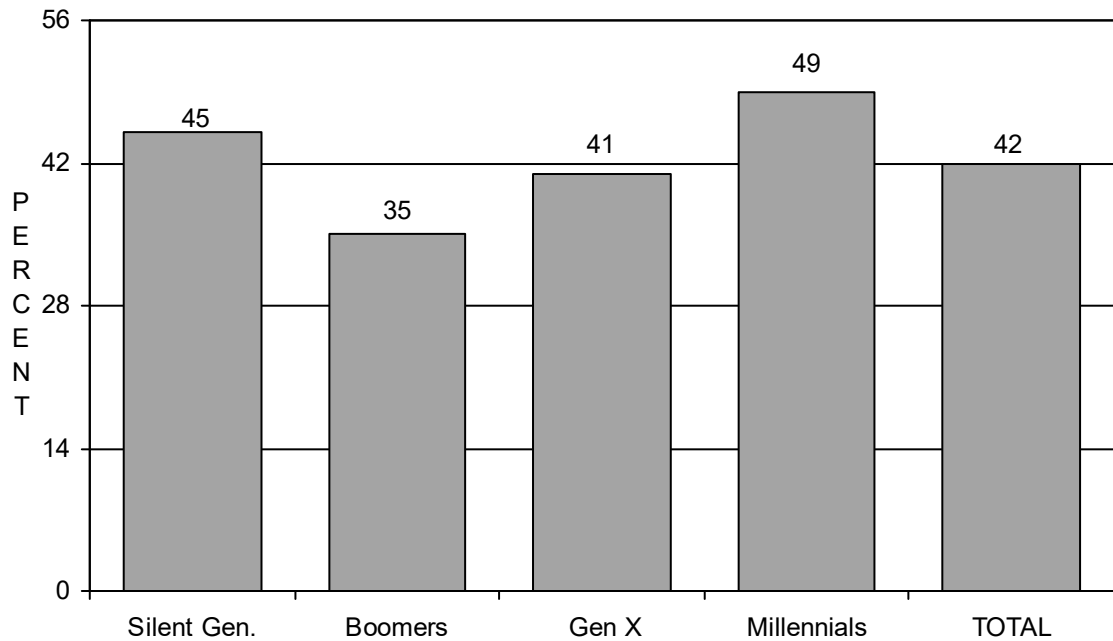
FIGURE 23
Social Media And Travel Review Apps Used During Current
Trip To Las Vegas



Multiple responses permitted

Visitors were asked which, if any, social media and travel review websites or apps they used during their trip in Las Vegas. One-third (32%) mentioned Google and about one in four said they used Vegas.com (23%), while one in five used Facebook (20%). Nearly four in ten visitors (37%) said that they did not use any social media websites or apps to plan their activities. Millennials were the most likely segment to use TripAdvisor (15%) and the least likely to use Vegas.com (18%). Millennials (21%) and Gen X visitors (22%) were more likely than Boomers (16%) to use Facebook. Millennials (19%) and Gen X visitors (14%) were also more likely than Boomers (8%) to use Instagram. Boomers (42%) were more likely than Gen X visitors (35%) and Millennials (34%) to say that they didn't use any social media and travel review websites or apps.

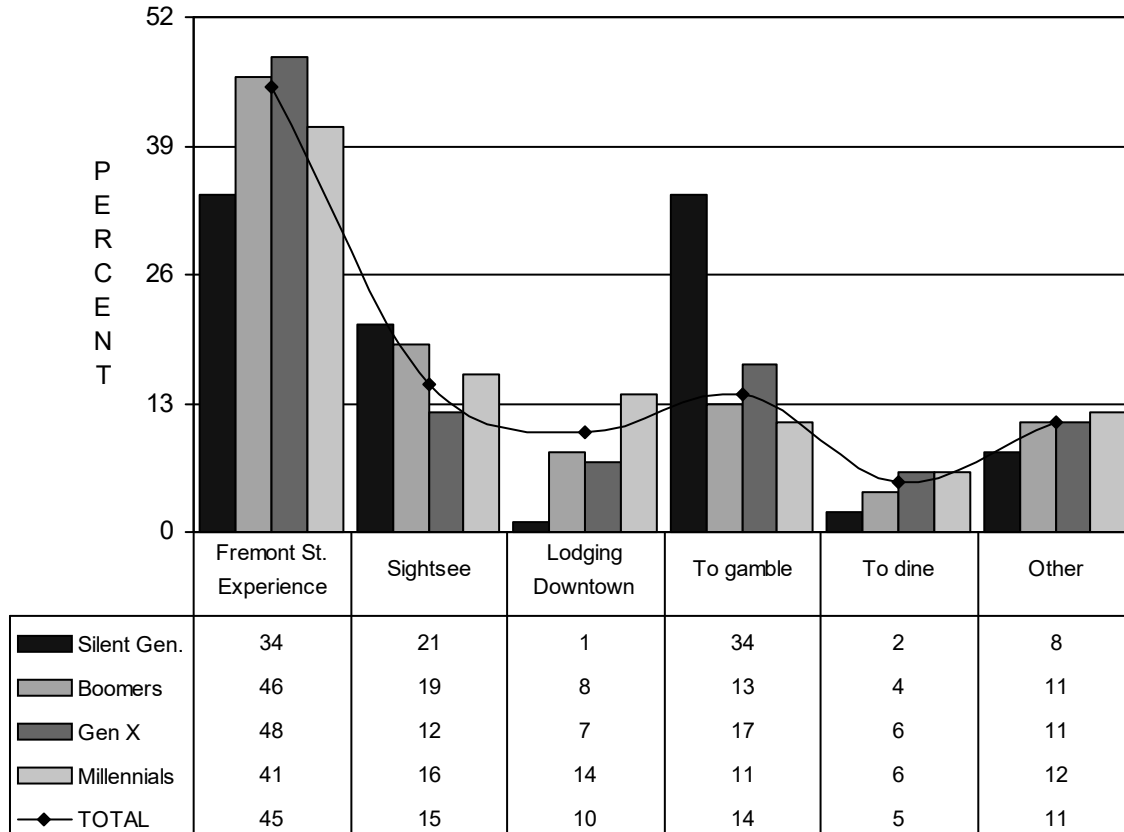
FIGURE 24
Whether Visited Downtown Las Vegas



Only "yes" responses are reported in this figure.

Over four in ten (42%) of all visitors said they visited Downtown Las Vegas. Millennials (49%) were more likely to have visited Downtown than Gen X visitors (41%), who in turn were more likely than Boomers (35%) to have done so.

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

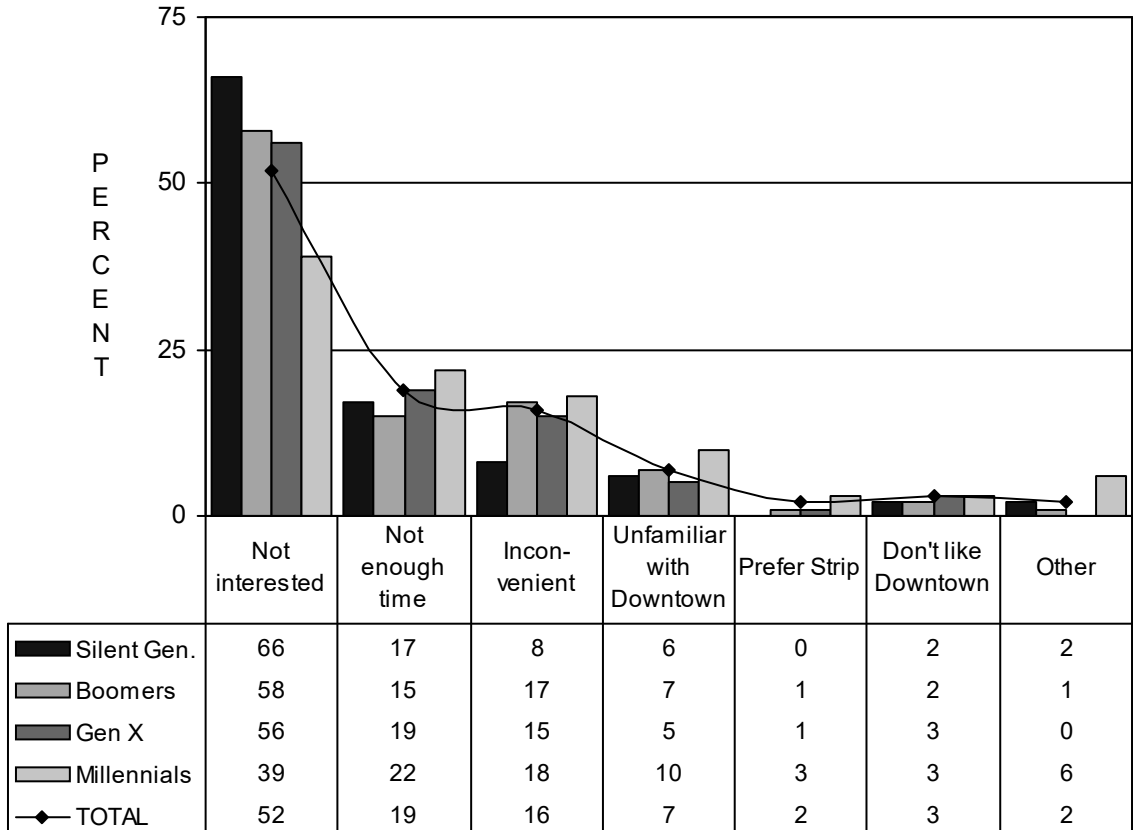


(Base Sizes: Silent Gen=22*, Boomers=372, Gen X=495, Millennials=617, TOTAL=1506)

Respondents who visited Downtown were asked why they did so. Overall, just under one-half (45%) of visitors said it was to see the Fremont Street Experience. Millennials (14%) were the most likely segment to say they were lodging Downtown. Gen X visitors (17%) were more likely than Millennials (11%) to say they went Downtown to gamble, while Boomers (19%) were more likely than Gen X visitors (12%) to say they went Downtown to sightsee.

* Note the very small base size for the Silent Generation.

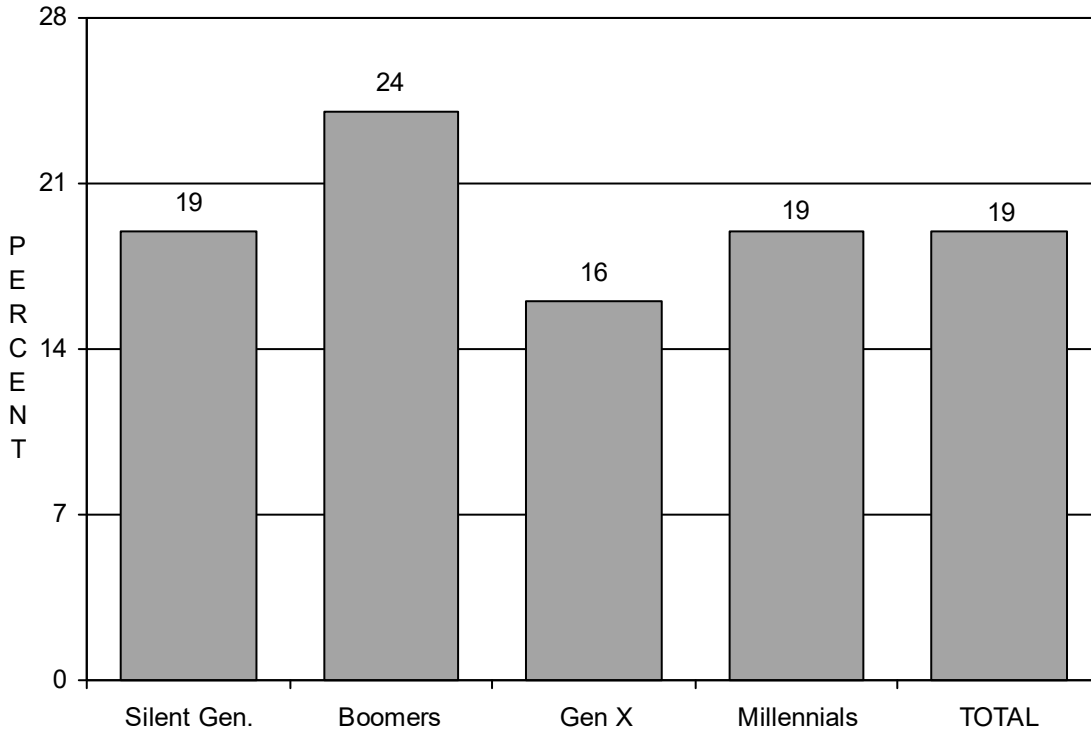
FIGURE 26
Main Reason For Not Visiting Downtown Las Vegas
(Among Those Who Did Not Visit Downtown)



(Base Sizes: Silent Gen=27, Boomers=691, Gen X=722, Millennials=648, TOTAL=2092)

Respondents who did not visit Downtown were asked why they did not. Overall, about one-half (52%) of these visitors said they just weren't interested in going Downtown. Millennials (39%) were the least likely segment to give this response.

FIGURE 27
Visits To Nearby Places*

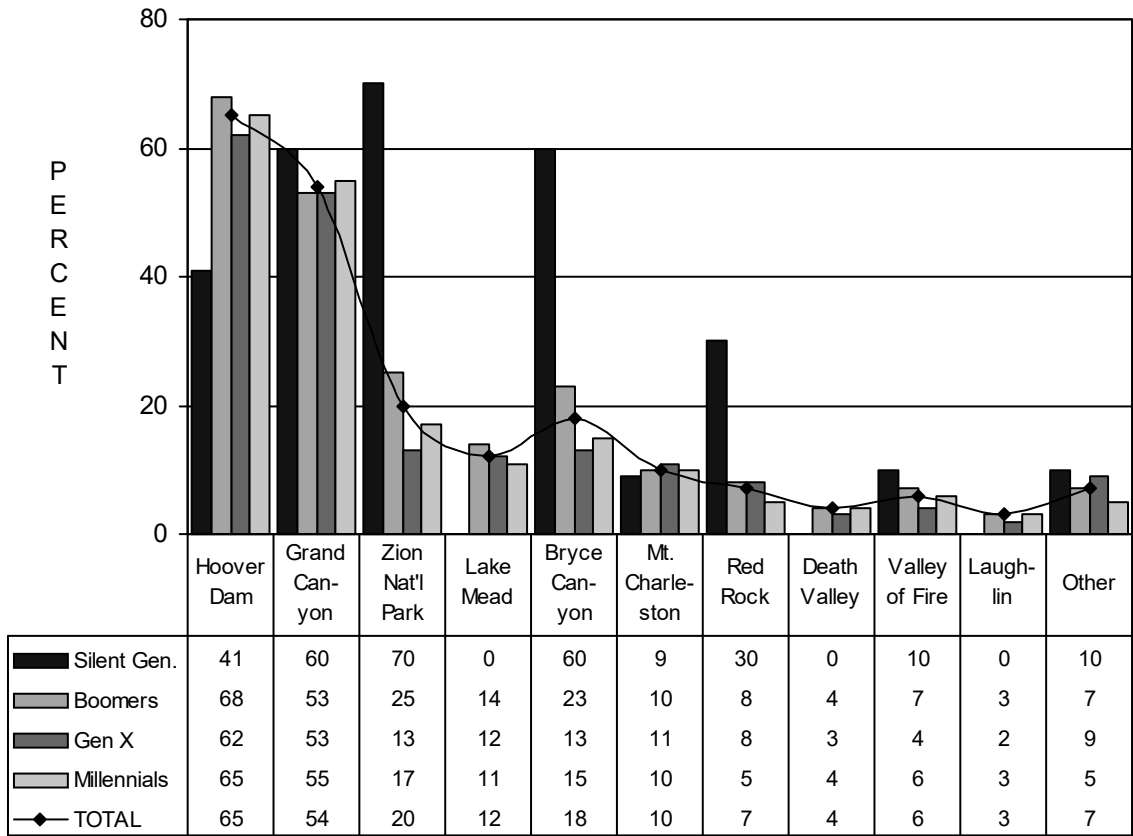


Only "yes" responses are reported in this figure.

One out of five (19%) visitors said they had visited, or planned to visit, tourist destinations near Las Vegas on their current trip. Boomers (24%) were more likely than Millennials (19%) or Gen X visitors (16%) to say that they had visited or planned to visit nearby places.

* These results are from 2018. This question is asked every other year and was not asked in 2019.

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



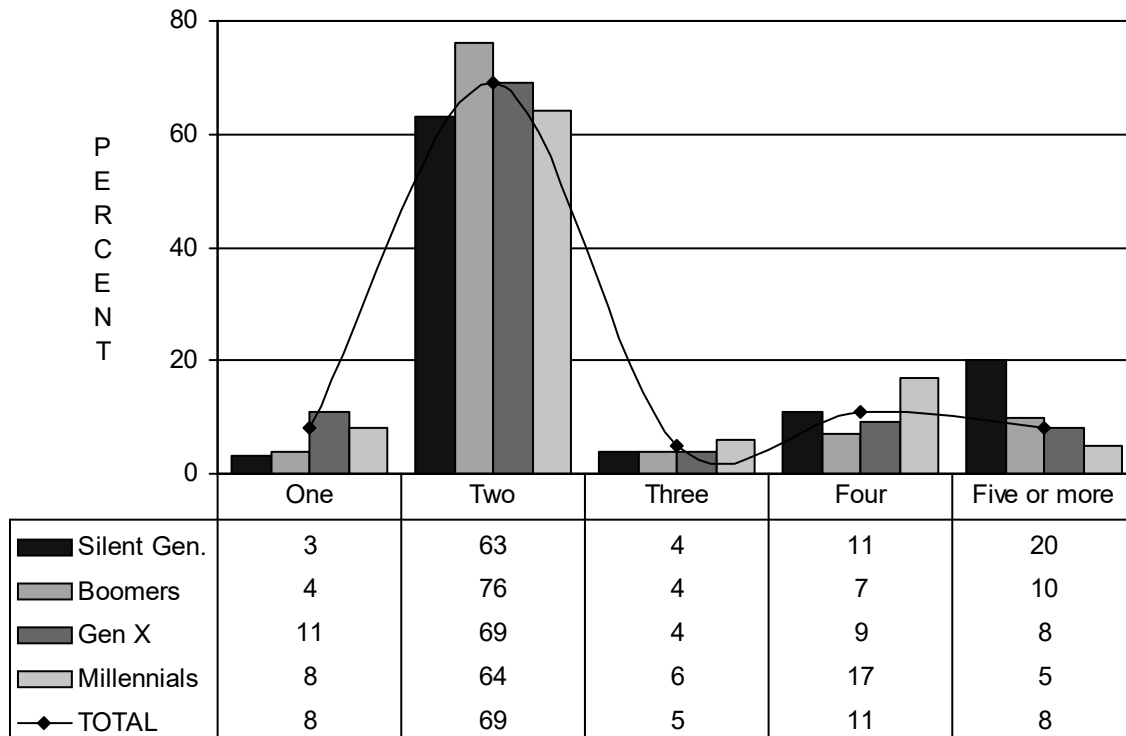
Multiple responses permitted.
(Base Sizes: Silent Gen=8*, Boomers=257, Gen X=174, Millennials=254, TOTAL=694)

Hoover Dam (65%) and the Grand Canyon (54%) were by far the two most popular nearby destinations visited. Boomers were more likely than Gen X visitors and Millennials to have visited Zion National Park or Bryce Canyon.

* These results are from 2018. This question is asked every other year and was not asked in 2019. Note the very small base size for The Silent Generation.

TRIP CHARACTERISTICS AND EXPENDITURES

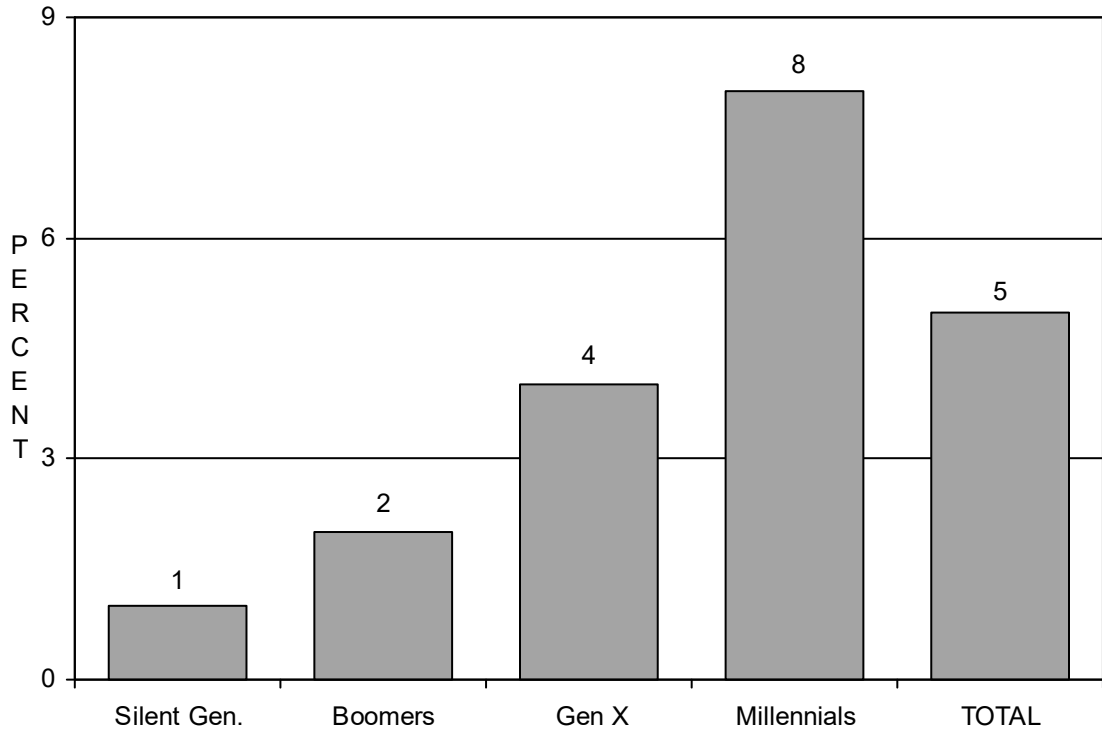
FIGURE 29
Adults In Immediate Party



(Means Silent Gen=2.9, Boomers=2.5, Gen X=2.5, Millennials=2.6, TOTAL=2.5)

About seven in ten visitors (69%) traveled to Las Vegas in parties of two. Millennials (17%) were more likely than Gen X visitors (9%) and Boomers (7%) to say they were travelling in parties of four. The Silent Generation (20%) and Boomers (10%) were more likely than Millennials (5%) to say they were travelling in parties of five or more. Boomers (76%) were more likely than Gen X visitors (69%) and Millennials (64%) to say they were travelling in parties of two. Gen X visitors (11%) were also more likely than Boomers (4%) to say they were travelling alone.

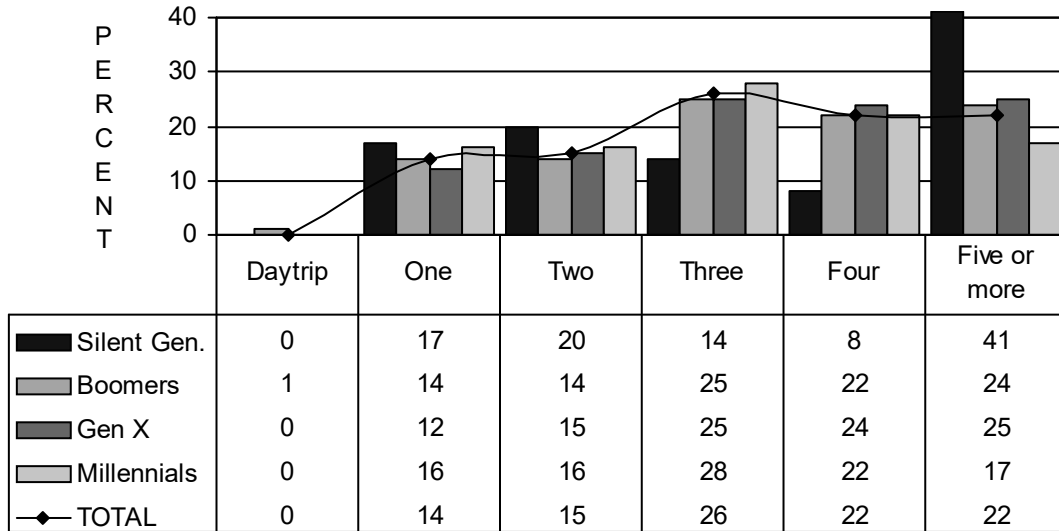
FIGURE 30
Persons In Immediate Party Under Age 21
(Among All Visitors)



Only "yes" responses are reported in this figure.

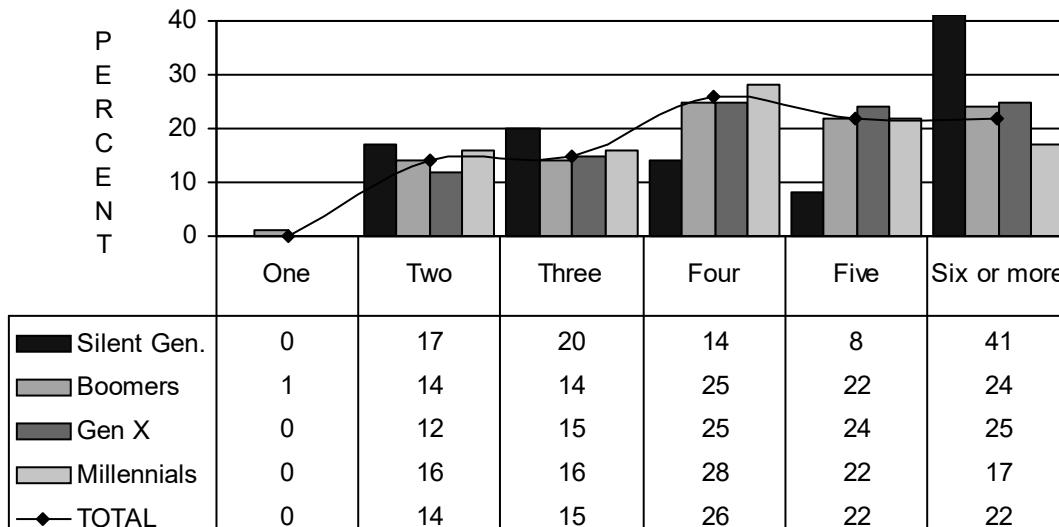
Five percent (5%) of all visitors said they were traveling with people under the age of 21 in their parties. Millennials (8%) were the most likely segment to be traveling with people under the age of 21. Gen X visitors (4%) were also more likely than Boomers (2%) to be traveling with people under the age of 21.

FIGURE 31
Nights Stayed



(Means Silent Gen=3.8, Boomers=3.4, Gen X=3.5, Millennials=3.2; TOTAL=3.4)

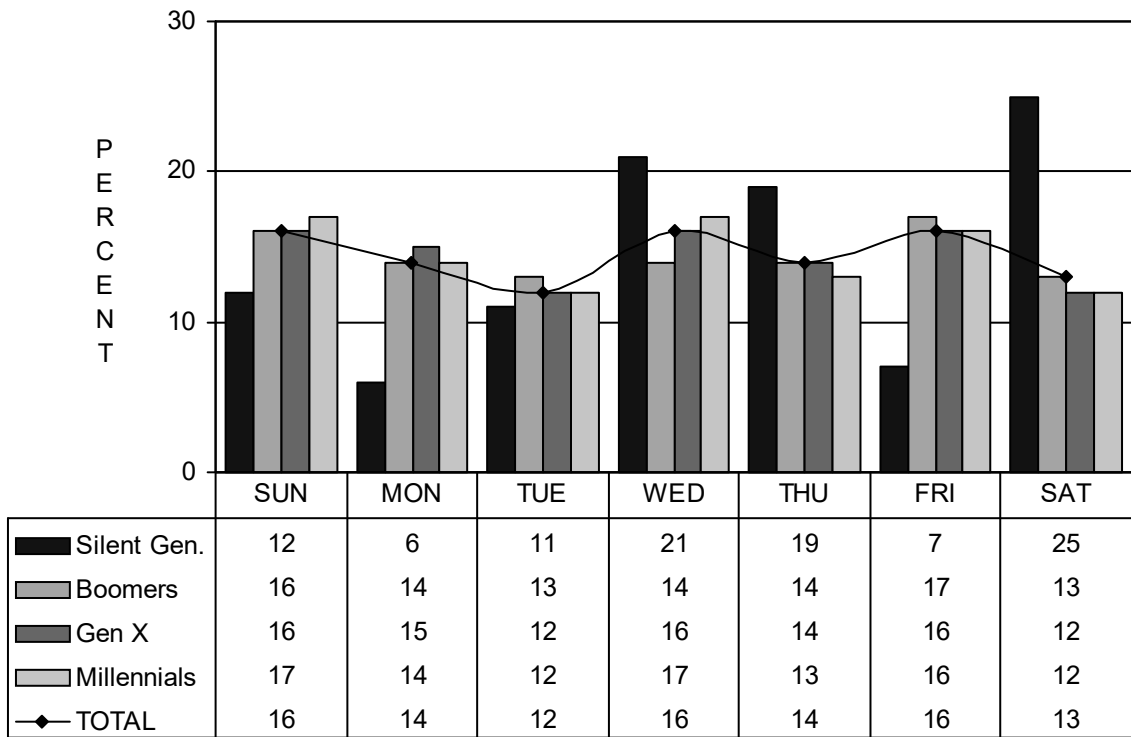
FIGURE 32
Days Stayed



(Means: Silent Gen=4.8, Boomers=4.4, Gen X=4.5, Millennials=4.2; TOTAL=4.4)

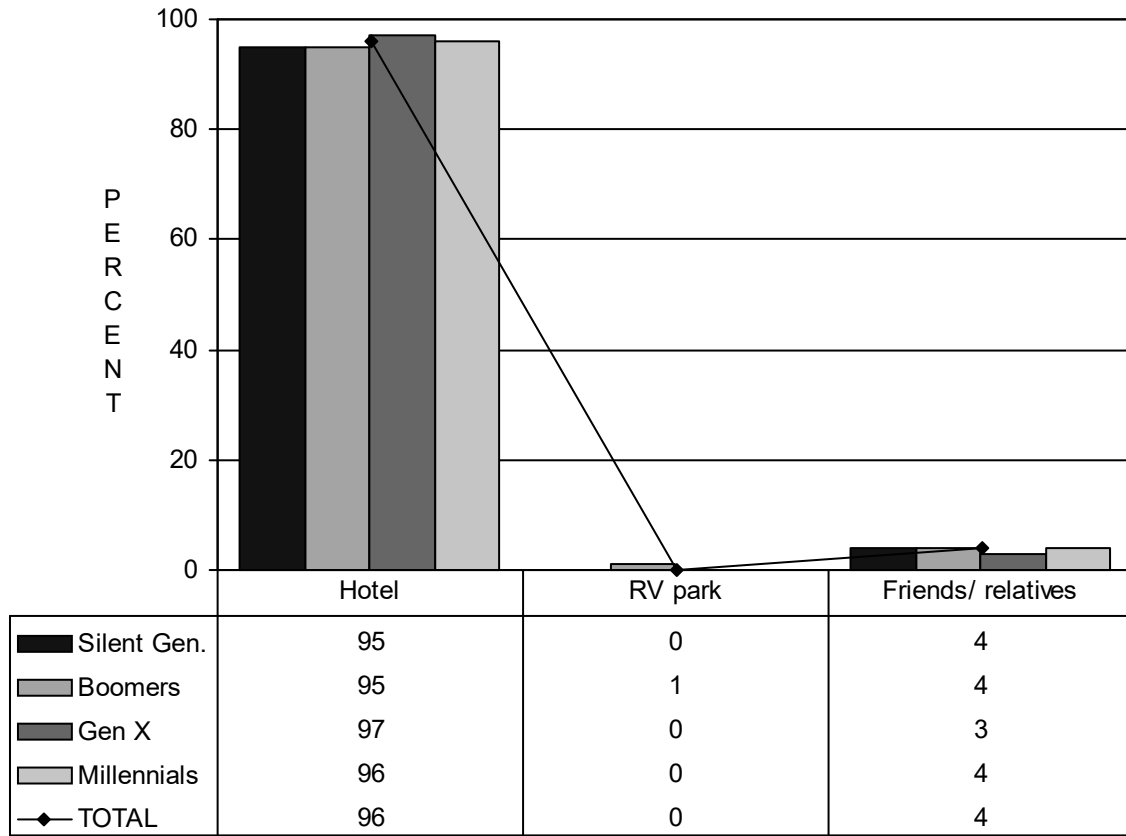
Visitors stayed in Las Vegas an average of 3.4 nights and 4.4 days. On average, Millennials (3.2 nights and 4.2 days) stayed in Las Vegas less time than all other segments.

FIGURE 33
Day Of Arrival



All respondents were asked on what day of the week they arrived in Las Vegas. There were no statistically significant differences between these segments with respect to the day they arrived in Las Vegas.

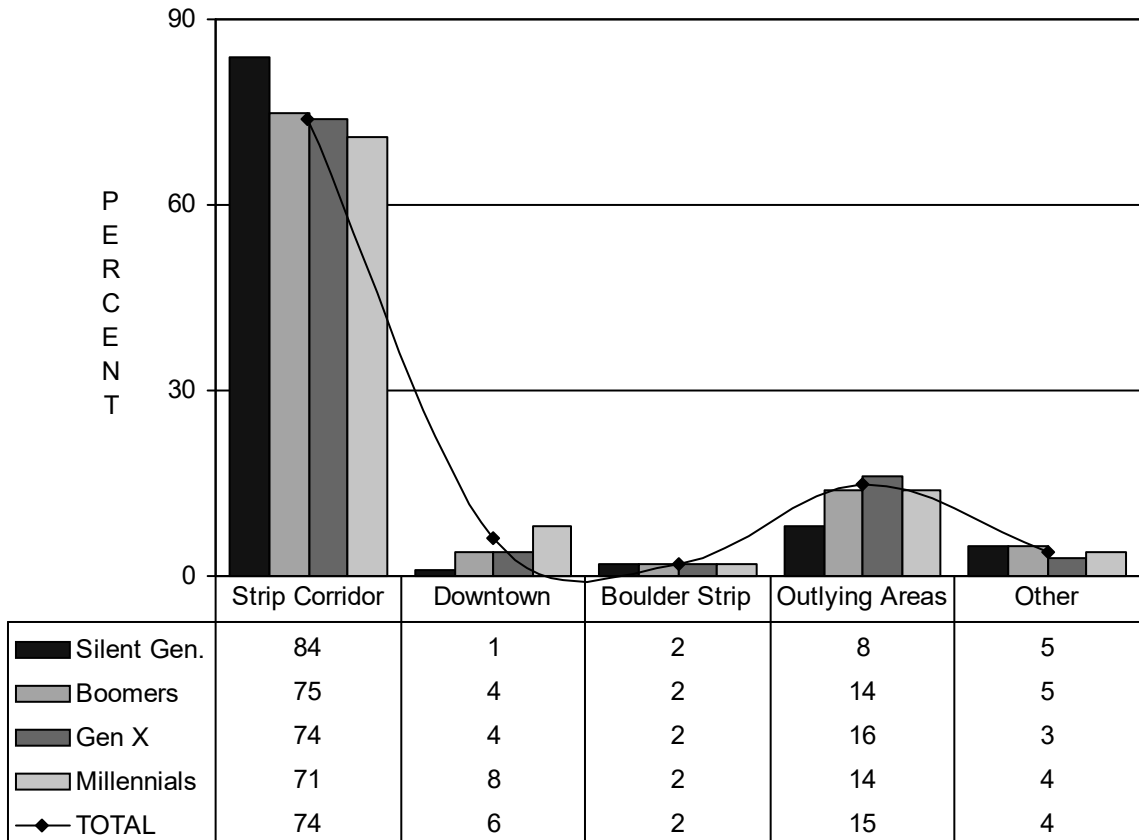
FIGURE 34
Type Of Lodging
(Among Those Who Stayed Overnight)



(Base Sizes: Silent Gen=49, Boomers=1058, Gen X=1216, Millennials=1262, TOTAL=3588)

Among the vast majority of visitors who stayed overnight in Las Vegas, 96% lodged in a hotel or a timeshare. Boomers (1%) were the most likely segment to have stayed in an RV Park.

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

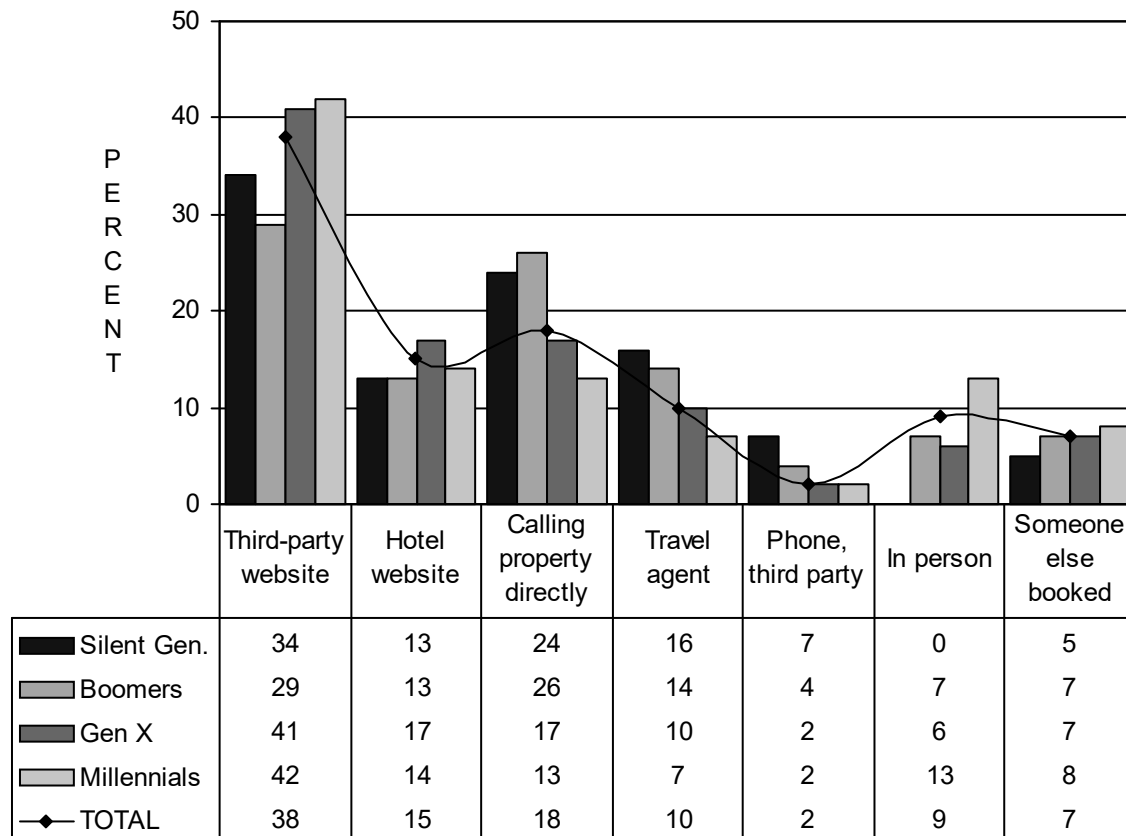


(Base Sizes: Silent Gen=49, Boomers=1058, Gen X=1216, Millennials=1262, TOTAL=3588)

In terms of lodging location, about three-fourths (74%) of all visitors stayed overnight on the Strip Corridor*. Millennials (8%) were the most likely segment to have stayed Downtown.

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

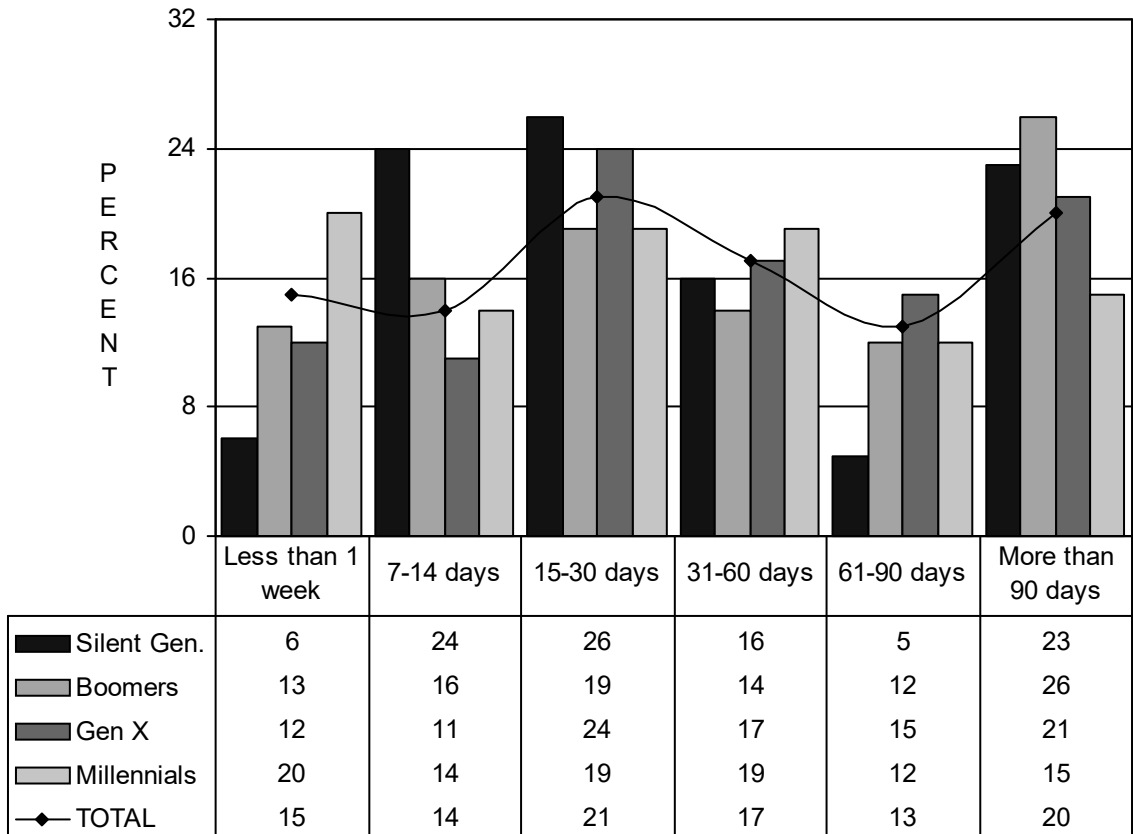
FIGURE 36
How Booked Accommodations
(Among Those Who Stayed In A Hotel/RV Park)



(Base Sizes: Silent Gen=47, Boomers=991, Gen X=1162, Millennials=1205, TOTAL=3409)

Visitors who stayed at a hotel 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. Millennials (42%) and Gen X visitors (41%) were more likely than Boomers (29%) to say they used a third-party website. Millennials (13%) were the least likely segment to say they booked by calling the property directly. Gen X visitors (17%) were more likely than Boomers (13%) to have booked via a hotel website. Boomers (14%) were more likely than Gen X visitors (10%) and Millennials (7%) to have booked through a travel agent. Millennials (13%) were the most likely segment to have booked in person. Boomers (4%) were more likely than Millennials and Gen X visitors (2% each) to say they booked by phone through a third party.

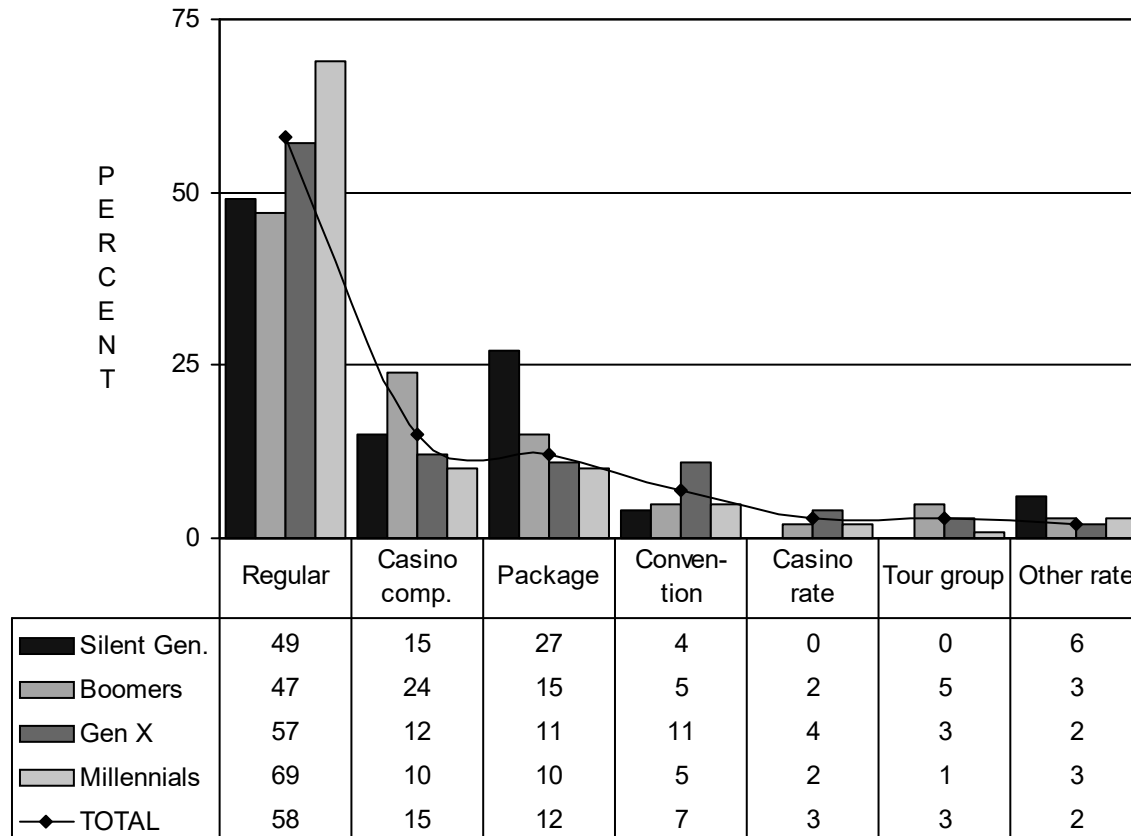
FIGURE 37
Advance Booking Of Accommodations
(Among Those Who Stayed In A Hotel/RV Park)



(Base Sizes Silent Gen=47, Boomers=991, Gen X=1162, Millennials=1205, TOTAL=3409)

Visitors staying overnight in a hotel or RV Park were asked how far in advance they had booked their accommodations. The Silent Generation (6%) were the least likely segment to say they booked their accommodations less than one week in advance while Millennials (20%) were the most likely to have done so. Gen X visitors (11%) were the least likely segment to say they booked their lodging between 7 – 14 days. However, Gen X visitors (24%) were more likely than Boomers and Millennials (19% each) to have booked between 15 - 30 days in advance. Boomers (26%) and Gen X visitors (21%) were more likely than Millennials (15%) to book their accommodations more than 90 days in advance.

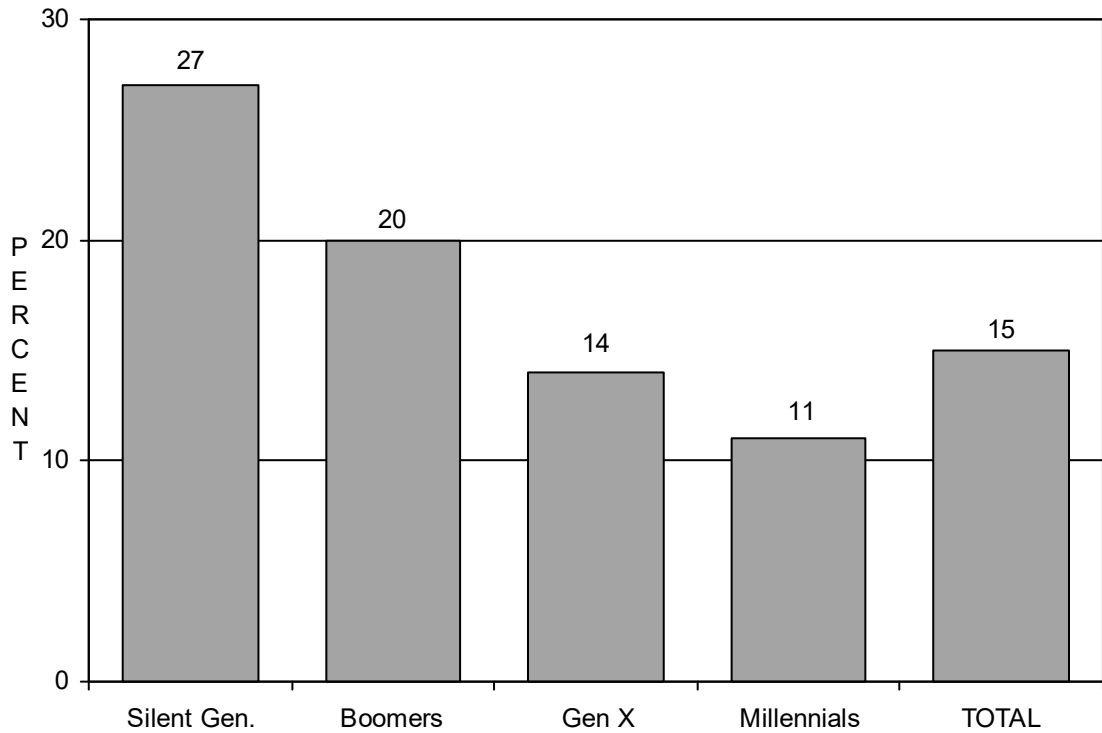
FIGURE 38
Type Of Room Rates
(Among Those Staying In A Hotel)



(Base Sizes: Silent Gen=47, Boomers=985, Gen X=1160, Millennials=1203, TOTAL=3400)

Looking at the type of room rates received by hotel lodgers, Millennials (69%) were the most likely segment to have received a regular room rate, Gen X visitors (4%) were the most likely segment to have received a casino rate, and Boomers (24%) were the most likely segment to have gotten a casino comp. Gen X visitors (11%) were also the most likely segment to have paid a convention rate while Boomers (5%) were also the most likely segment to receive a tour group rate.

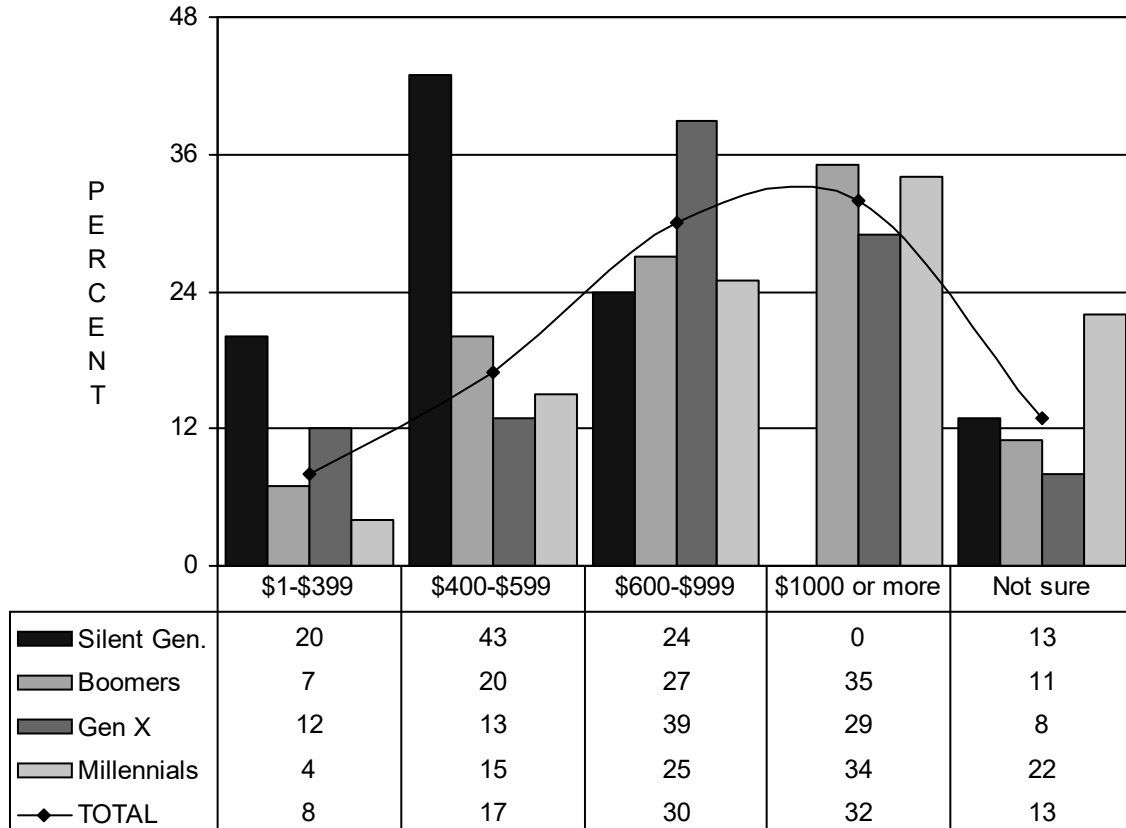
FIGURE 39
Package Purchasers
(Among Those Staying In A Hotel)



(Base Sizes: Silent Generation=47, Boomers=985, Gen X=1160, Millennials=1203, TOTAL=3400)

About one in seven (15%) of these visitors said they were visiting Las Vegas as part of a tour group or package deal. Boomers (20%) were more likely than both Gen X visitors (14%) and Millennials (11%) to be visiting as part of a tour group or package deal.

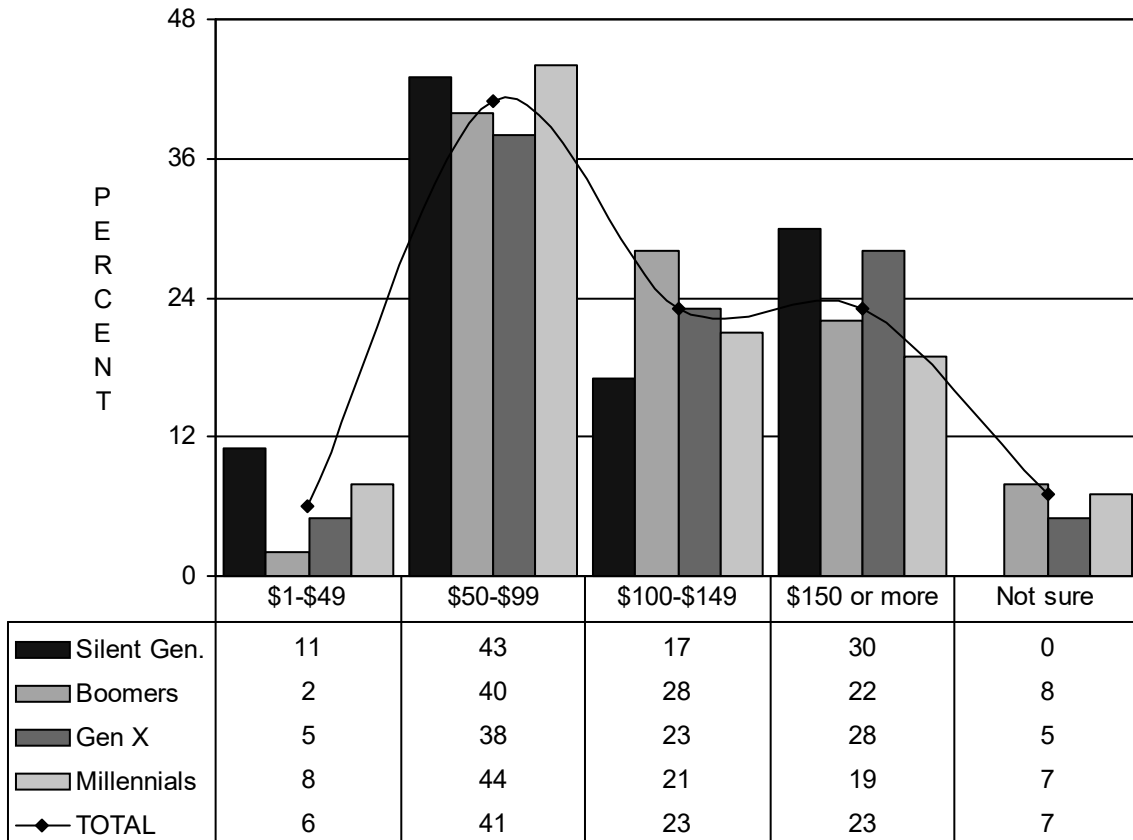
FIGURE 40
Cost Of Package Per Person
(Among Those Who Bought A Package)



(Base Sizes: Silent Gen*=13, Boomers=199, Gen X=159, Millennials=134, TOTAL=504)
(Mean: Silent Gen=\$515.61, Boomers=\$1,015.01, Gen X=\$989.54, Millennials=\$972.25, TOTAL=\$983.73)

We asked those visitors who purchased either a hotel or a tour/travel group package how much their package cost per person. Overall, the average cost of a package was \$983.73 and there were no statistically significant differences between the segments in terms of the average cost. However, relatively more Gen X visitors (39%) paid \$600 to \$999 than either Boomers (27%) or Millennials (25%). Gen X visitors (12%) were also more likely than Millennials (4%) to have paid less than \$400 for their package.

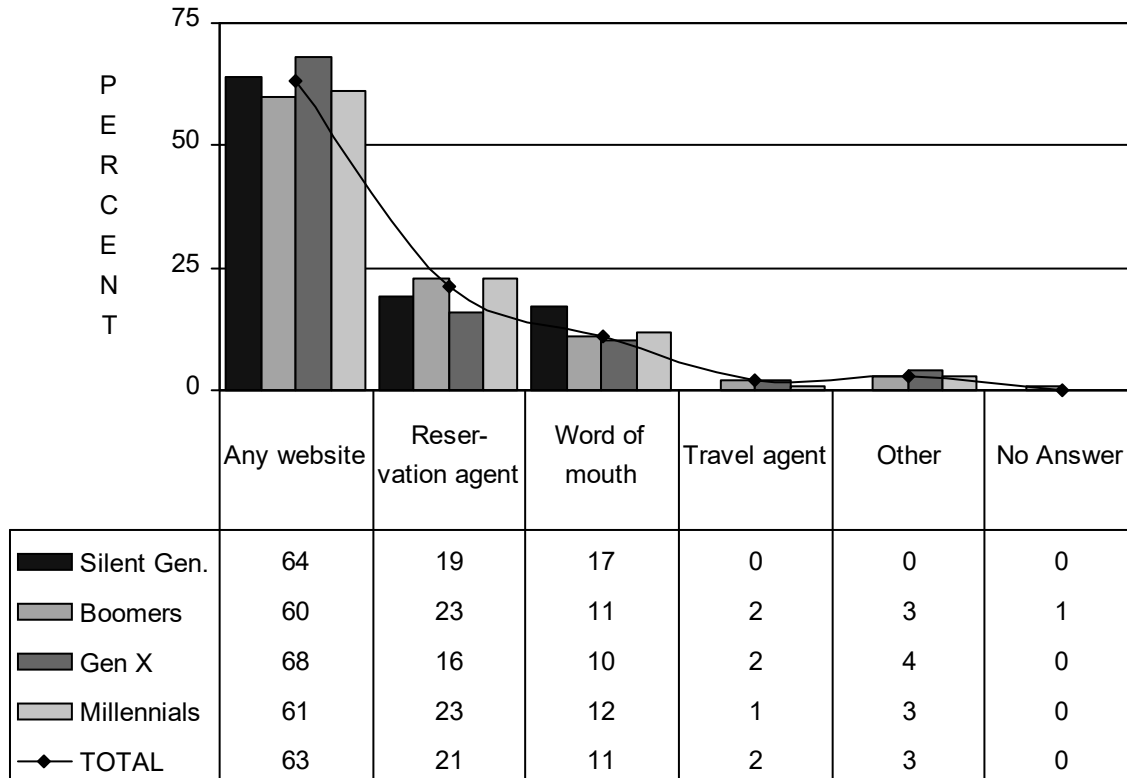
FIGURE 41
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel/Non-Package And Non-Comp)



(Base Sizes Silent Gen=28, Boomers=555, Gen X=862, Millennials=946, TOTAL=2394)
(Means: Silent Gen=\$123.21, Boomers=\$117.20, Gen X=\$120.42, Millennials=\$106.60, TOTAL=\$114.37)

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 cost per night for lodging was \$114.37. Gen X visitors (average of \$120.42) and Boomers (\$117.20) paid more for their lodging on average than Millennials (\$106.60). Gen X visitors (28%) were more likely than Boomers (22%) and Millennials (19%) to have paid \$150 or more per night. Millennials (8%) were more likely than Gen X visitors (5%) and Boomers (2%) to have paid less than \$50.00 per night for their room.

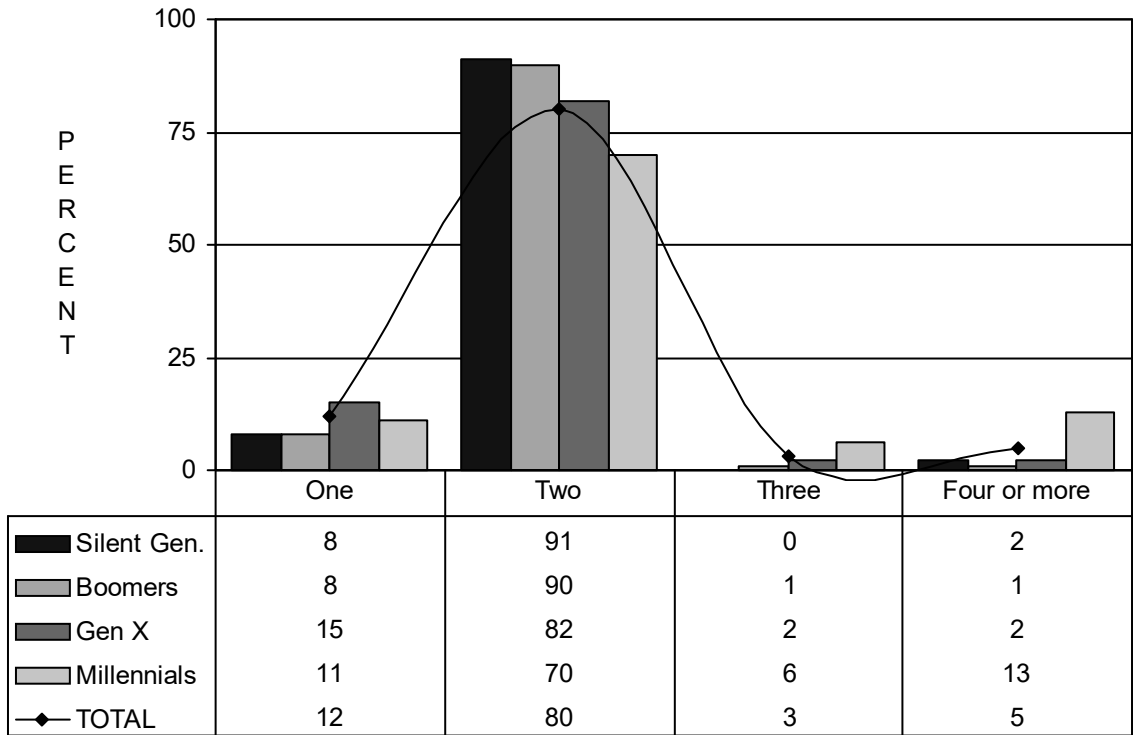
FIGURE 42
How First Found Out About Room Rate
(Among Those Staying In A Hotel/Non-Package And Non-Comp)



(Base Sizes: Silent Gen=28, Boomers=555, Gen X=862, Millennials=946, TOTAL=2394)

Non-package purchasers who were not comped for their stay were asked how they first found out about the room rate they paid. A website (63%) was the most common response, followed by a reservation agent (21%) and word-of-mouth (11%). Gen X visitors (68%) were more likely than Millennials (61%) and Boomers (60%) to say they heard about their rate through a website. Gen X visitors (16%) were less likely than Boomers and Millennials (both 23%) to say they heard about the rate from a reservation agent.

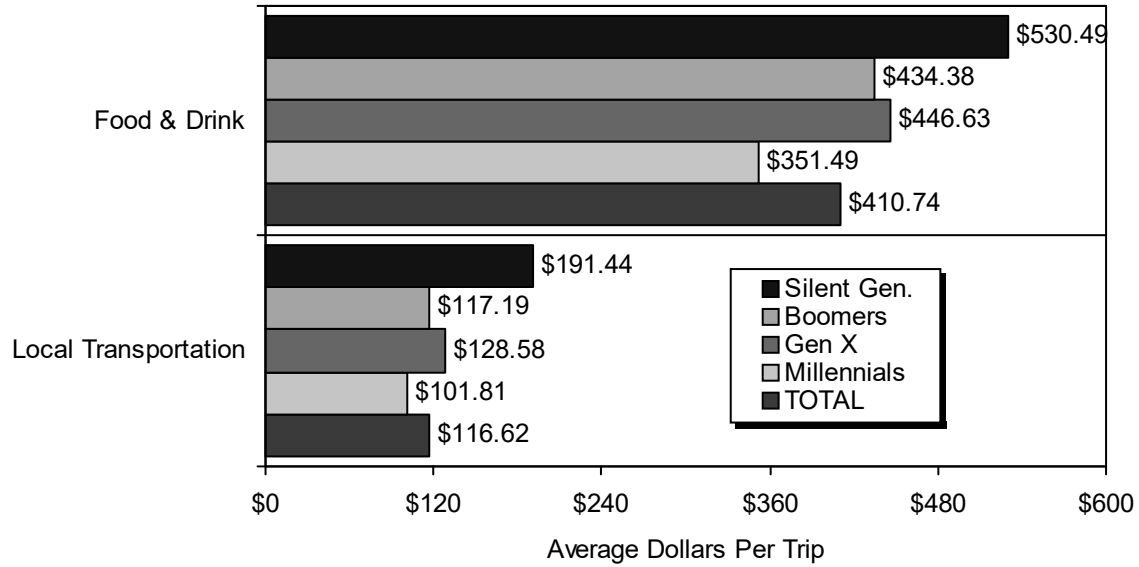
FIGURE 43
Number Of Room Occupants
(Among Those Staying In A Hotel)



(Base Sizes: Silent Gen=47, Boomers=1004, Gen X=1175, Millennials=1209, TOTAL=3440)
(Means: Silent Gen=2.0, Boomers=2.0, Gen X=1.9, Millennials=2.2, TOTAL=2.0)

The majority of visitors who stayed overnight in a hotel (80%) said two people stayed in their room. Boomers (90%) were more likely than Millennials (70%) and Gen X visitors (82%) to say two people lodged in their room. Gen X visitors (15%) were more likely than Millennials (11%) and Boomers (8%) to say that they were rooming alone. Millennials (6%) were more likely than Gen X visitors (2%) and Boomers (1%), to say that three people were staying in their room. Millennials (13%) were also the most likely segment to say that four or more people were lodging in their room. The average number of room occupants among all lodgers was 2.0. The average number of room occupants among Millennials (2.2) was higher than among Boomers (2.0) and Gen X visitors (1.9).

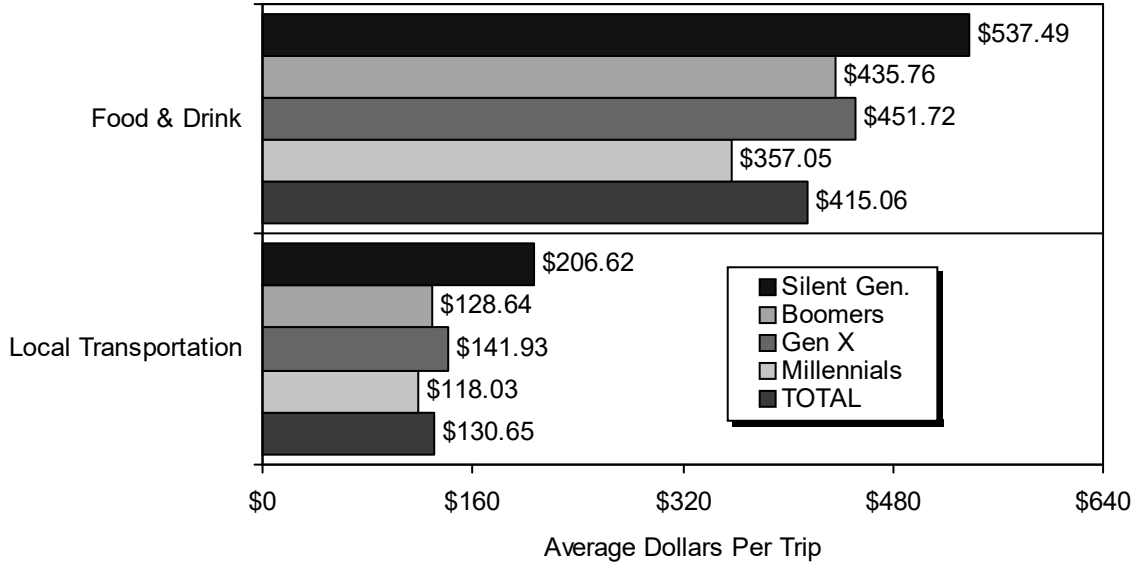
FIGURE 44
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Including Visitors Who Spent Nothing In That Category)



On average, Millennials (\$351.49) spent less on food and drink than any of the other generational segments.

The Silent Generation visitors (mean of \$191.44) spent more on average for local transportation than any of the other generational segments.

FIGURE 45
 Average Trip Expenditures On Food & Drink —
 And On Local Transportation
 (Among Those Who Spent Money In That Category)



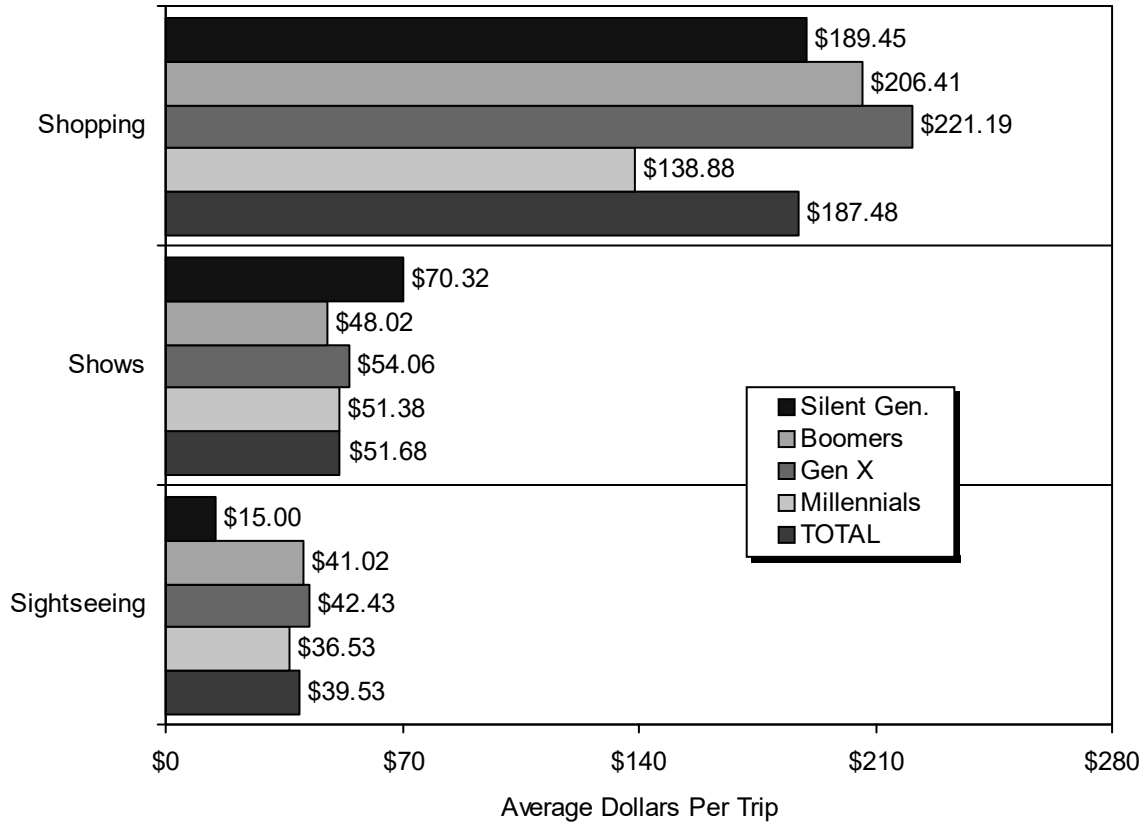
(Base Sizes, Food & Drink: Silent Gen=48, Boomers=1059, Gen X=1204, Millennials=1245, TOTAL=3562)
 (Base Sizes, Local Transportation Silent Gen=46, Boomers=968, Gen X=1104, Millennials=1092, TOTAL=3214)

This figure shows the average trip expenditures on food and drink and on local transportation *among visitors who actually spent money* in these categories.

On average, spending Millennials (\$357.05) spent less on food and drink than any of the other generational segments.

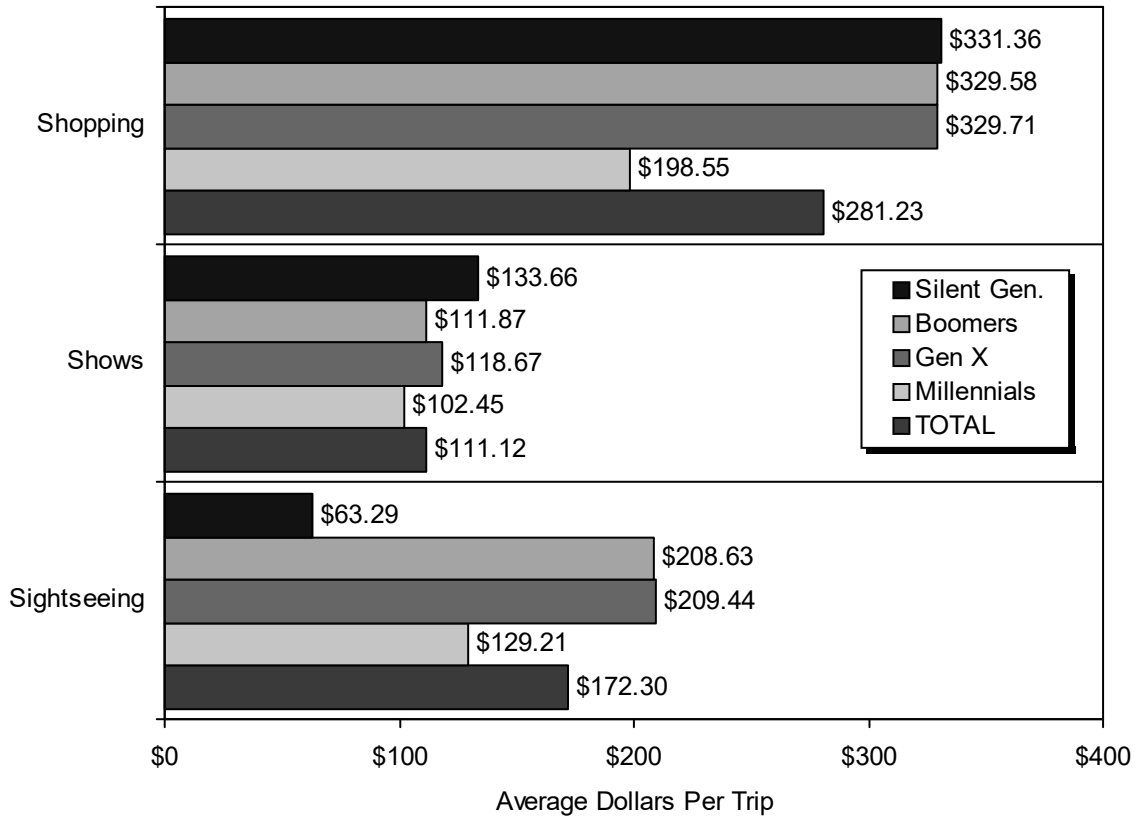
Silent Generation visitors who spent money on local transportation (mean of \$206.62) spent more on average than any of the other generational segments.

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



On average, Gen X visitors (\$221.19) and Boomers (\$206.41) spent more on shopping than Millennials (\$138.88). The average amount spent on shows by all visitors was \$51.68 with no statistically significant differences among the four generational segments. The average amount spent on sightseeing by all visitors was \$39.53, again with no statistically significant differences among the four generational segments.

FIGURE 47
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Among Those Who Spent Money In That Category)



(Base Sizes, Shopping: Silent Gen=29*, Boomers=667, Gen X=817, Millennials=886, TOTAL=2402)

(Base Sizes, Shows: Silent Gen=26*, Boomers=457, Gen X=556, Millennials=635, TOTAL=1676)

(Base Sizes, Sightseeing: Silent Gen=12*, Boomers=235, Gen X=263, Millennials=382, TOTAL=894)

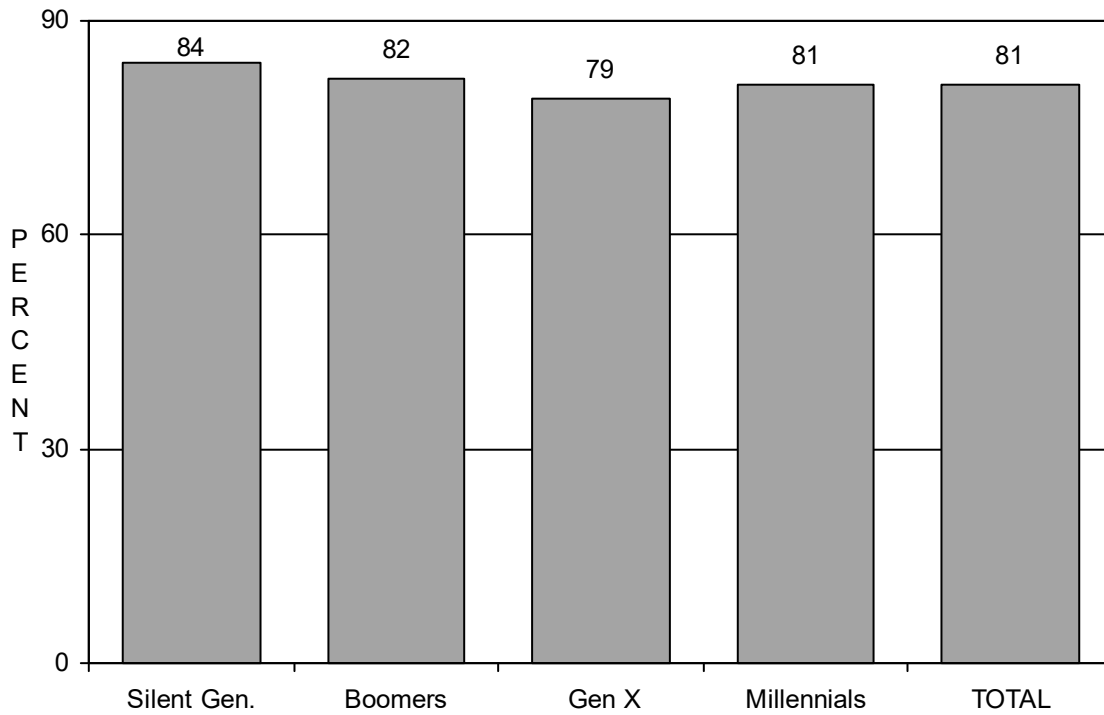
This figure shows the average trip expenditures on shopping, shows, and sightseeing *among visitors who actually spent money* in these categories.

On average, spending Millennials (mean of \$198.55) spent less on shopping than any of the other generational segments. The average amount spent on shows by all spending visitors was \$111.12 with Gen X visitors (\$118.67) spending more than Millennials (\$102.45). The average amount spent on sightseeing by all spending visitors was \$172.30 with Gen X visitors (\$209.44) and Boomers (\$208.63) spending more than Millennials (\$129.21).

* Note small base size for the Silent Generation.

GAMING BEHAVIOR AND BUDGETS

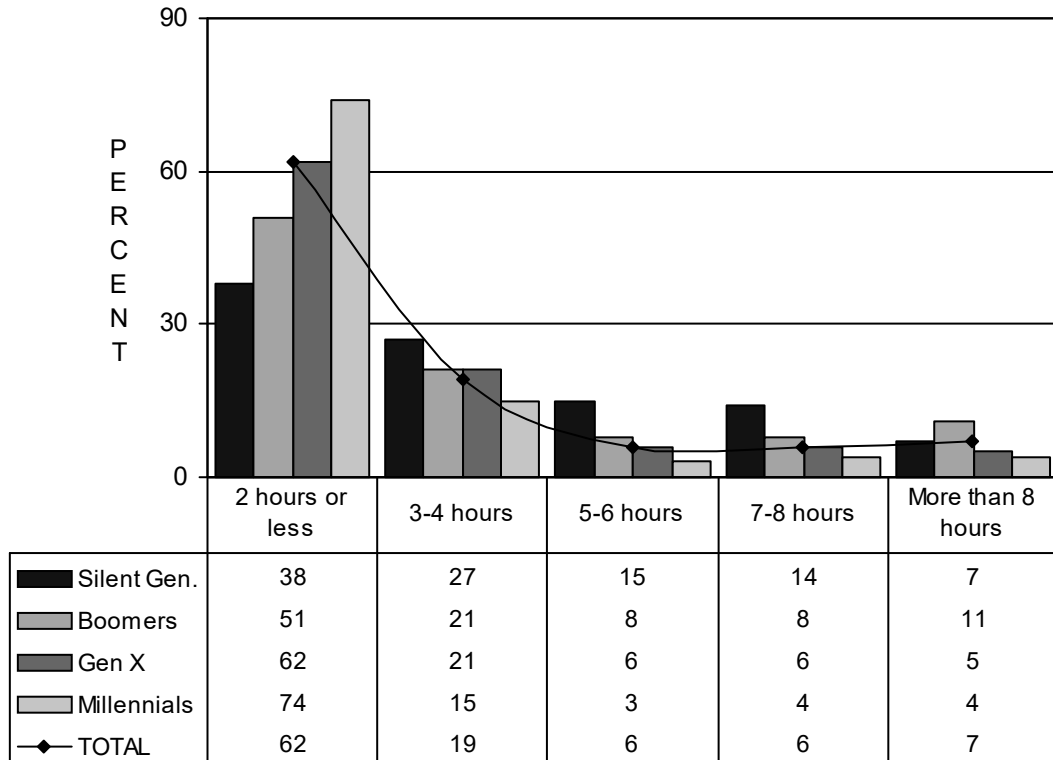
FIGURE 48
Whether Gambled While In Las Vegas



Only "yes" responses are reported in this figure.

Eighty-one percent (81%) of all visitors said they gambled while in Las Vegas. There were no statistically significant differences between the generational segments on this measure.

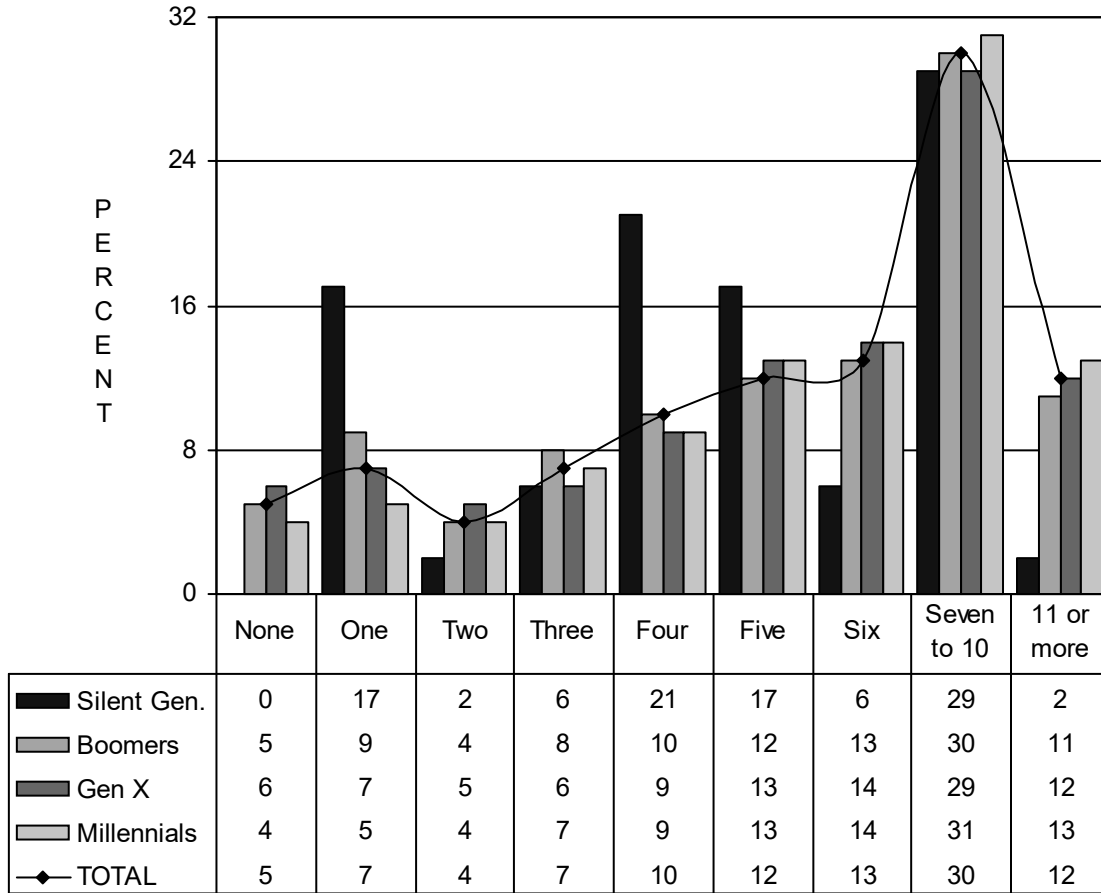
FIGURE 49
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



(Base Sizes Silent Gen=41, Boomers=867, Gen X=967, Millennials=1027, TOTAL=2902)
(Means: Silent Gen=4.0, Boomers=3.4, Gen X=2.7, Millennials=2.1, TOTAL=2.7)

Among those visitors who gambled while in Las Vegas, the average amount of time spent gambling per day was 2.7 hours. The Silent Generation (average of 4.0 hours) and Boomers (3.4 hours) spent more hours per day gambling than Gen X visitors (2.7 hours) and Millennials (2.1 hours). Millennials were the most likely segment to spend less than two hours per day (74%) and the least likely segment to spend five or more hours per day (11%) gambling.

FIGURE 50
Number Of Casinos Visited*

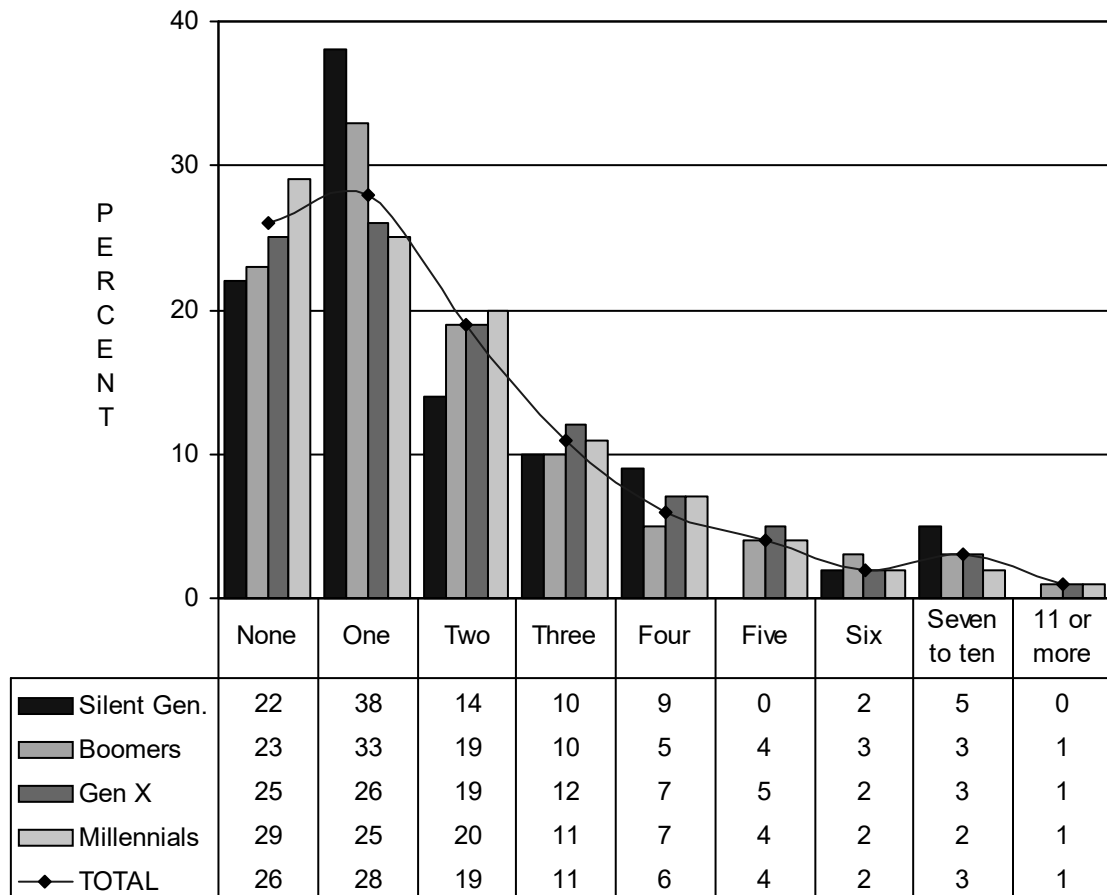


(Means: Silent Gen=5.1, Boomers=6.1, Gen X=6.3, Millennials=6.6, TOTAL=6.4)

All visitors to Las Vegas were asked how many casinos they had visited. The average number of casinos visited was 6.4. On average, Millennials visited more casinos (average of 6.6) than Gen X visitors (6.3) and Boomers (6.1).

* These results are from 2018. This question is asked every other year and was not asked in 2019.

FIGURE 51
Number Of Casinos Where Gambled*

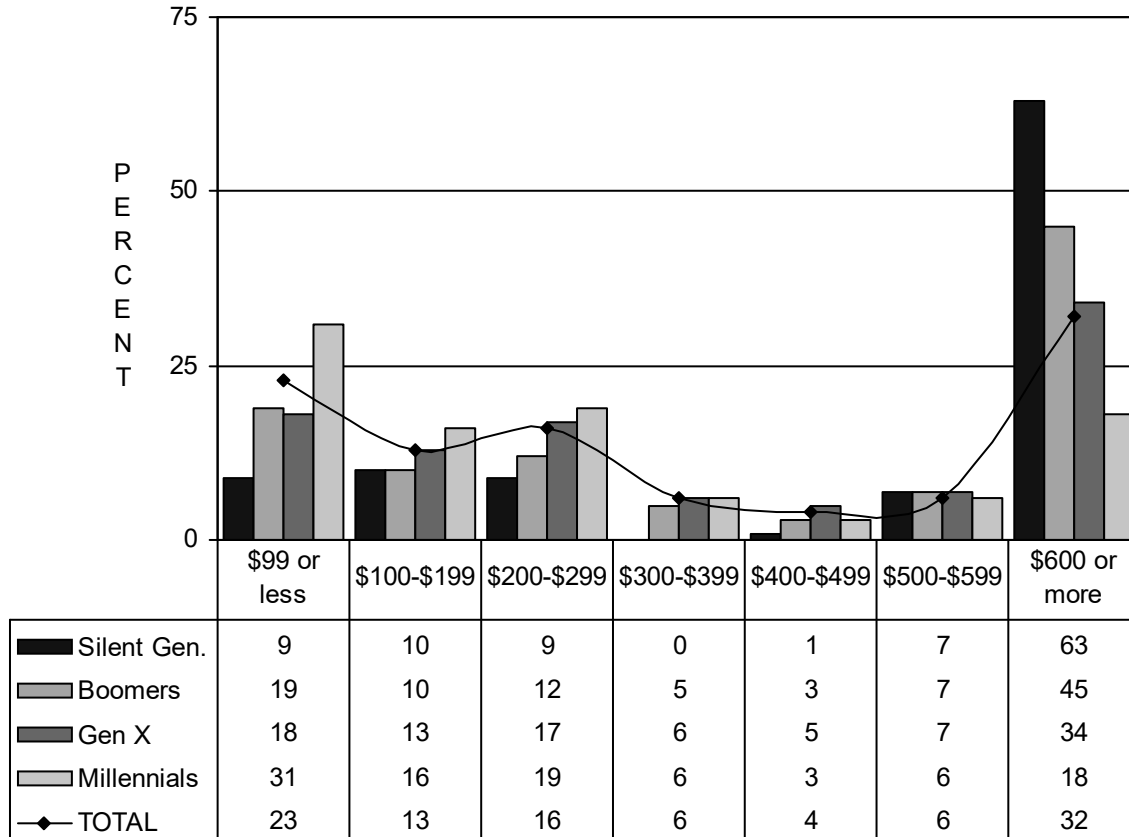


(Means Silent Gen=1.8, Boomers=1.9, Gen X=2.0, Millennials=1.8, TOTAL=1.9)

All visitors to Las Vegas were also asked at how many casinos they had gambled during their visit. The average number of casinos visitors gambled at was 1.9. Gen X visitors (2.0) gambled in more casinos than Millennials (1.8). Boomers (33%) were more likely than Gen X visitors (26%) or Millennials (25%) to say that they gambled in only one casino.

* These results are from 2018. This question is asked every other year and was not asked in 2019.

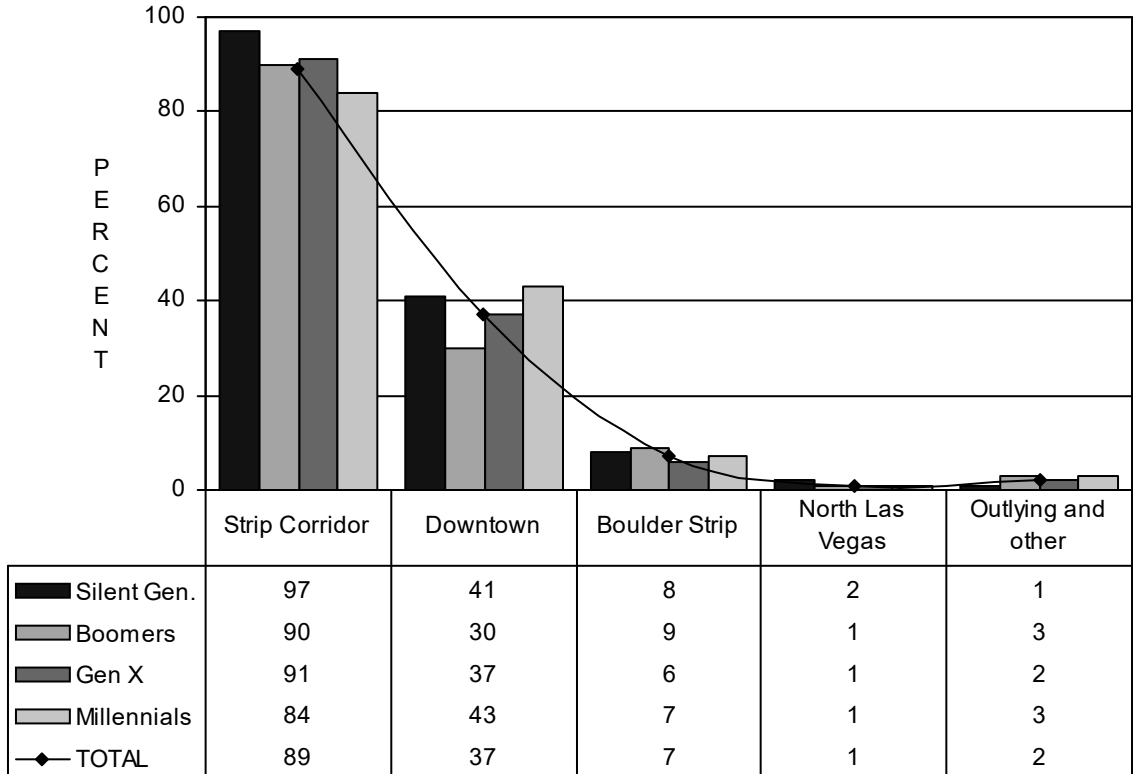
FIGURE 52
Trip Gambling Budget
(Among Those Who Gambled)



(Base Sizes: Silent Gen=41, Boomers=867, Gen X=967, Millennials=1027, TOTAL=2902)
(Means: Silent Gen=\$803.15, Boomers=\$838.20, Gen X=\$616.26, Millennials=\$350.47, TOTAL=\$591.06)

The average gaming budget among all visitors who gambled was \$591.06. Boomers (average of \$838.20) budgeted more for gambling than Gen X visitors (\$616.26) while Millennials (\$350.47) budgeted the least among all these generational segments. The Silent Generation (63%) were the most likely to budget \$600.00 or more, while Millennials (18%) were the least likely to do so.

FIGURE 53
Where Visitors Gambled
(Among Those Who Gambled)



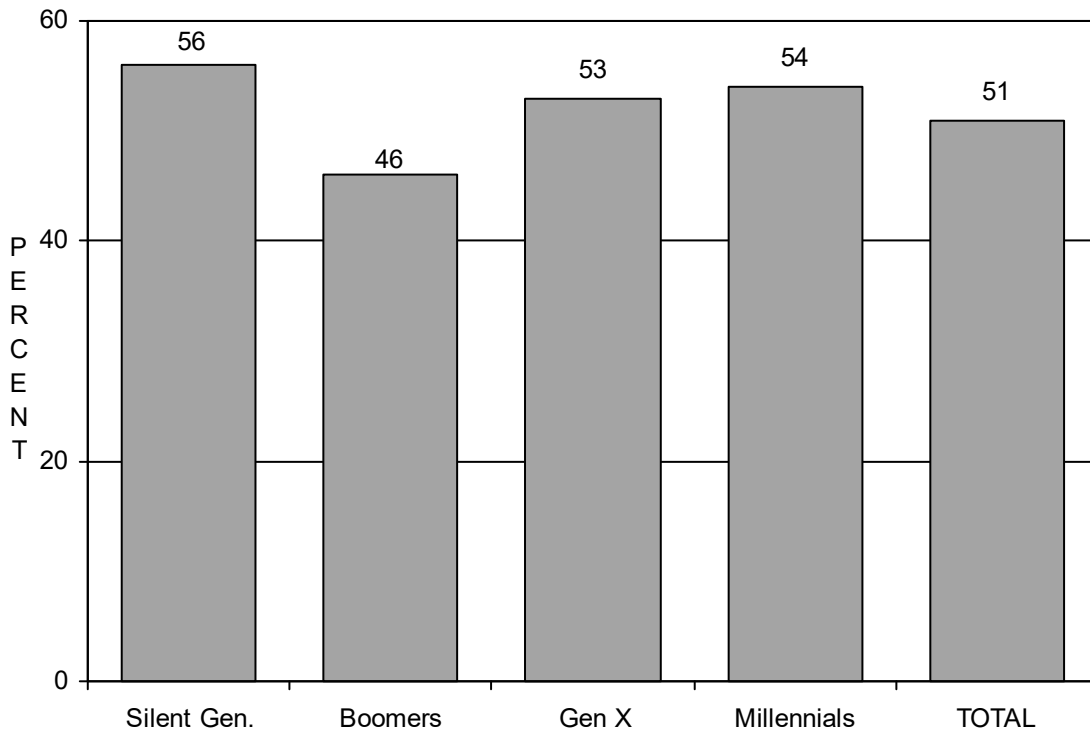
*Multiple responses were permitted.

(Base Sizes: Silent Gen=41, Boomers=867, Gen X=967, Millennials=1027, TOTAL=2902)

Visitors who said they had gambled while in Las Vegas were asked where they had done so. Most visitors (89%) gambled on the Strip Corridor. Millennials (84%) were the least likely to say they gambled on the Strip Corridor. Millennials (43%) and Gen X visitors (37%) were more likely than Boomers (30%) to say they gambled Downtown. Boomers (9%) were more likely than Gen X visitors (6%) to say they gambled on the Boulder Strip.

ENTERTAINMENT

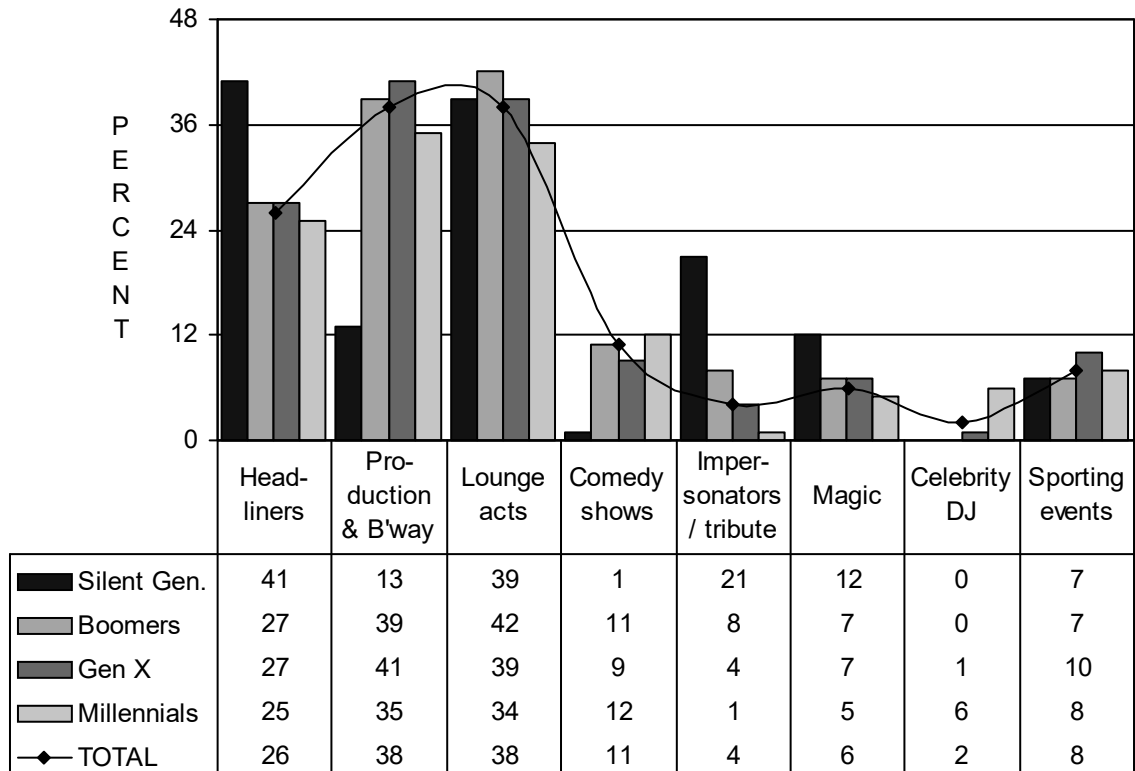
FIGURE 54
Attended A Show



Only "yes" responses are reported in this figure.

During their stay in Las Vegas one-half 51% of all visitors said they went to at least one show. Millennials (54%) and Gen X visitors (53%) were more likely than Boomers (46%) to have seen at least one show.

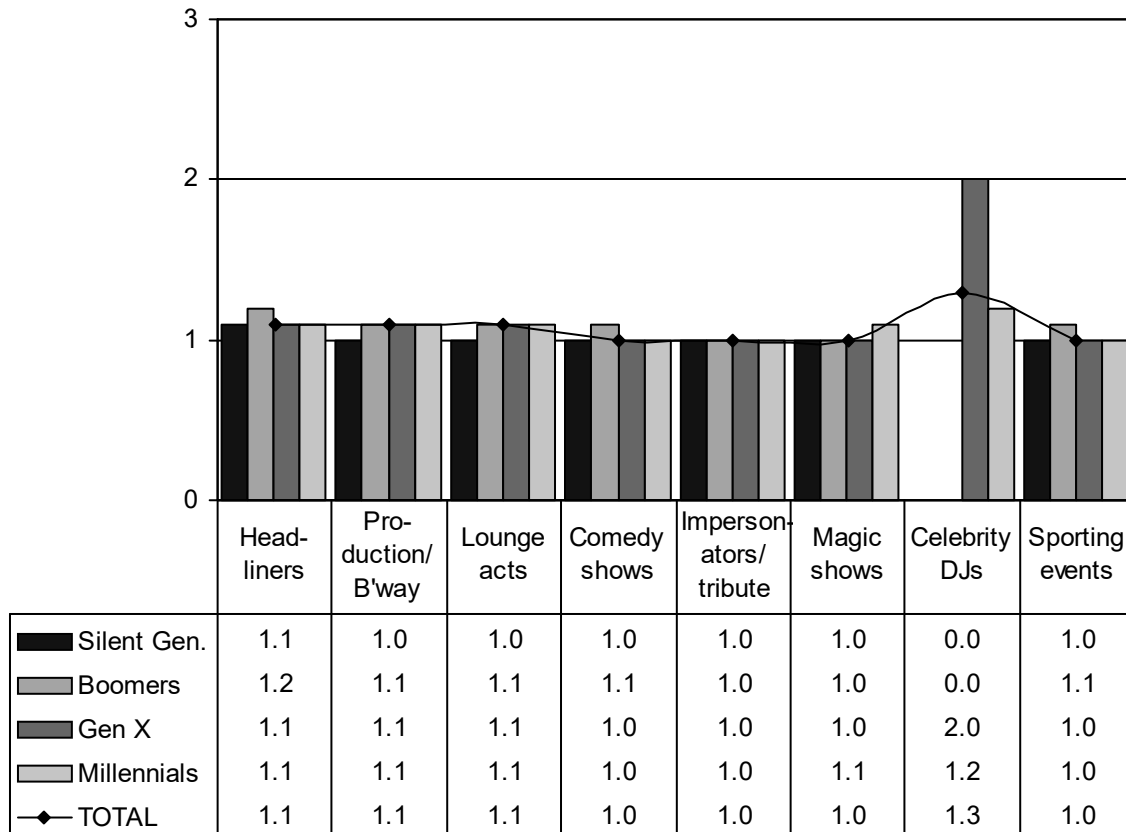
FIGURE 55
Types Of Entertainment*
(Among Those Who Attended Some Form Of Entertainment)



Multiple responses permitted.
(Base Sizes: Silent Gen=27, Boomers=492, Gen X=642, Millennials=676, TOTAL=1841)

Production or Broadway shows (38%) and lounge acts (38%) were the most frequently attended types of entertainment among visitors who had seen shows while in Las Vegas. Silent Generation visitors were the least likely segment to have seen a production or Broadway show (13%) or a comedy show (1%). Millennials were the most likely segment to have seen a Celebrity DJ (6%) and the least likely segment to have seen an impersonator or tribute show (1%). Silent Generation visitors (21%) and Boomers (8%) were more likely than Gen X visitors (4%) to have seen an impersonator or tribute show. Boomers (42%) were more likely than Millennials (34%) to have seen a lounge act.

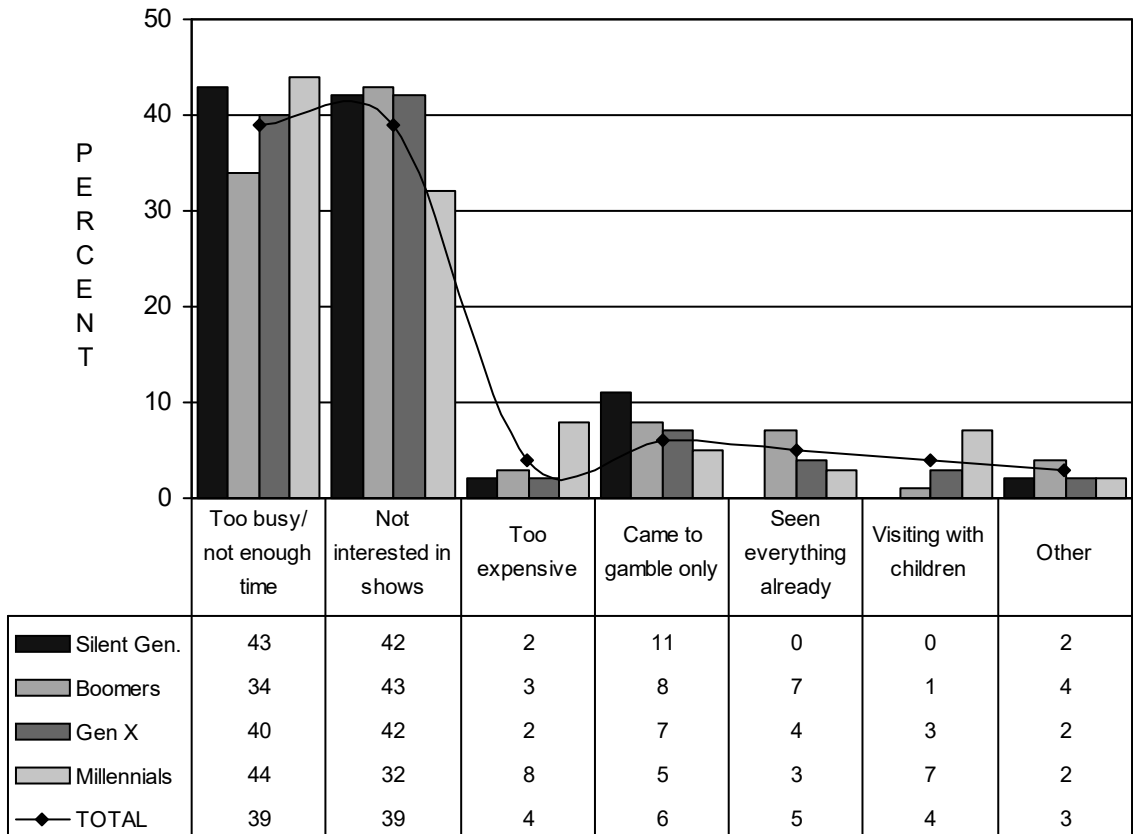
FIGURE 56
Average Number Of Shows Attended
(Among Those Who Attended Some Form Of Entertainment)



Multiple responses permitted.
(Base Sizes: Convention=27, Boomers=492, Gen X=642, Millennials=676, TOTAL=1841)

This figure shows the average number of times visitors attended each type of show *among those who attended shows*. Gen X visitors (2.0) saw more Celebrity DJ shows than any other generational segment.

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



(Base Sizes: Silent Gen=25*, Boomers=484, Gen X=468, Millennials=526, TOTAL=1503)

Visitors who did *not* attend any shows gave several reasons why they did not. The most common reasons were a lack of time and a lack of interest (39% each). Millennials (44%) were more likely than Boomers (34%) to cite a lack of time. Millennials were also the most likely segment to say it was because shows were too expensive or that they were traveling with children. Boomers (43%) and Gen X Visitors (42%) were more likely than Millennials (32%) to say that they were just not interested in shows. Boomers (7%) were more likely than Millennials (3%) to say that they had already seen shows or that there were no shows that were of interest to them.

* These results are from 2018. This question is asked every other year and was not asked in 2019. Note small base size for the Silent Generation

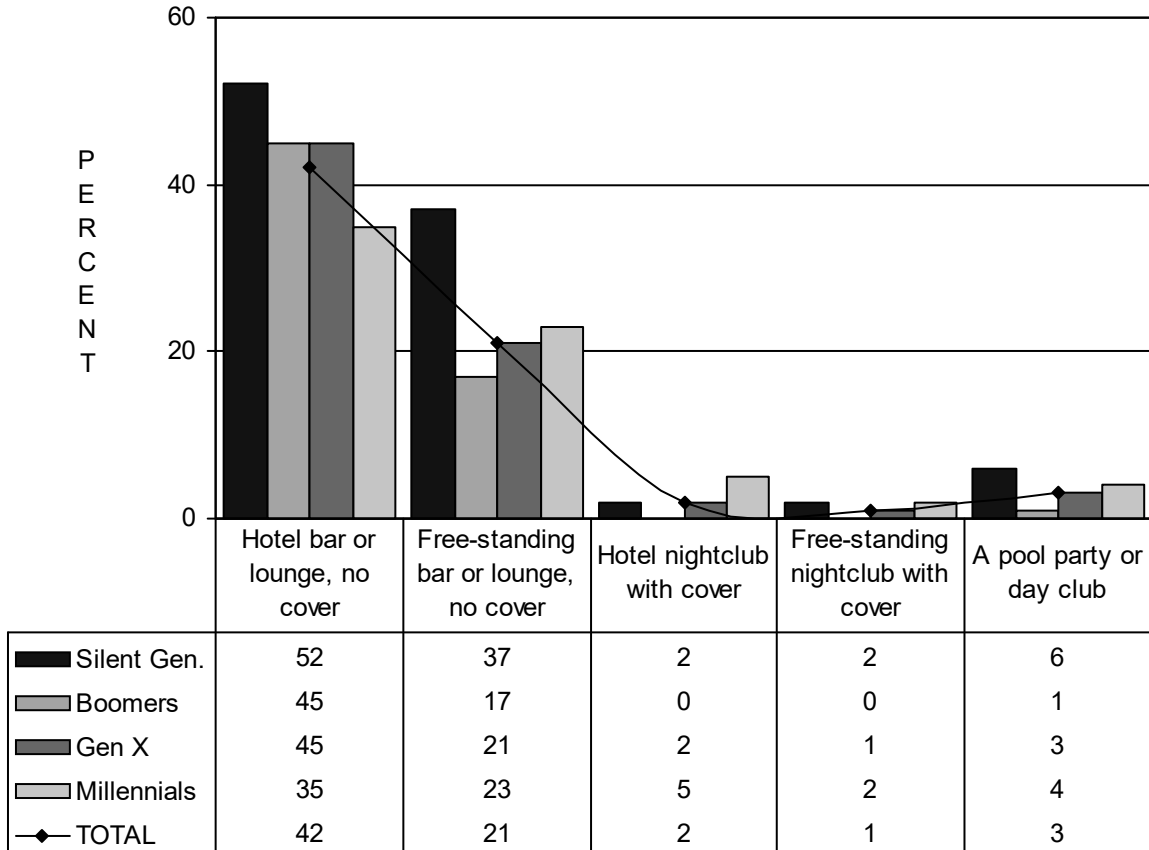
FIGURE 58



Only "yes" responses are reported in this figure.

Visitors were asked if during their current trip to Las Vegas they had been to other Las Vegas attractions for which they had to pay, such as theme parks or roller coasters. Overall, 28% said yes. Millennials (37%) were the most likely segment to have been to other paid attractions.

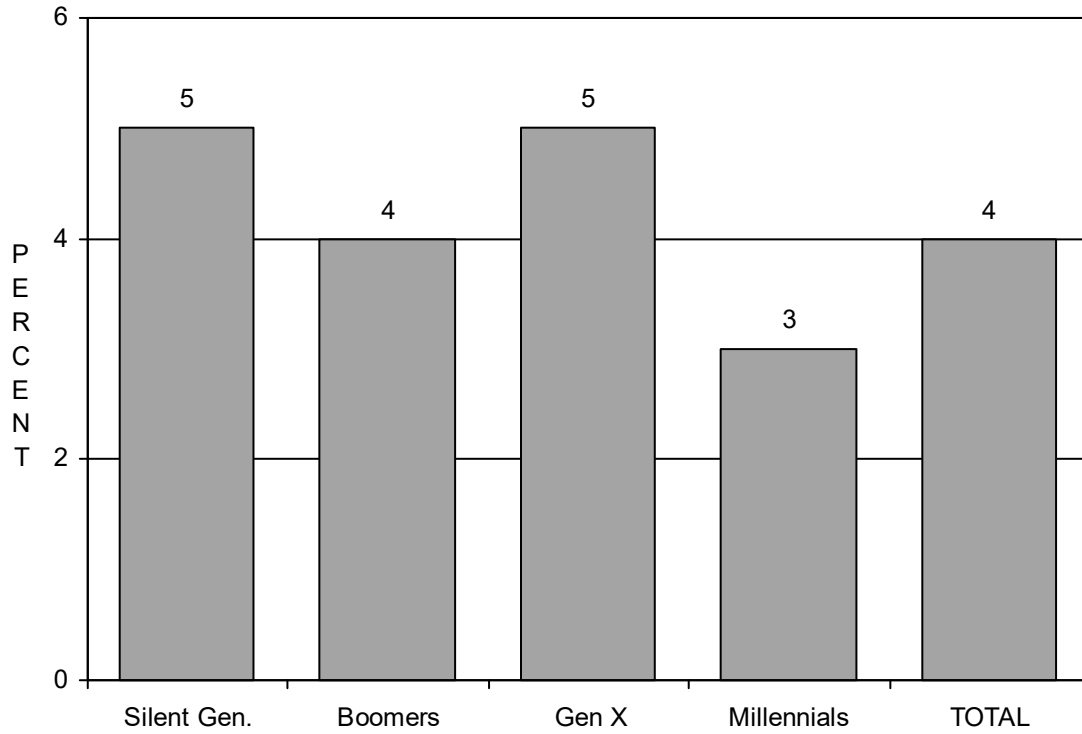
FIGURE 59
Whether Has Been To Nightclubs, Bars, And Lounges



Only "yes" responses are reported in this figure.

Visitors were asked if they visited nightclubs, bars, lounges, or pool parties or day clubs while in Las Vegas. Millennials (35%) were the least likely segment to have been to a hotel bar or lounge with no cover charge. Millennials (23%) were more likely than Boomers (17%) to have been to a free-standing bar or lounge without a cover charge. Millennials (4%) were also more likely than Boomers (1%) to have been to a pool party or day club. Millennials (5%) were more likely than both Gen X visitors (2%) and Boomers (less than 1%) to have been to hotel nightclub with a cover charge.

FIGURE 60
Whether Visited A Spa*



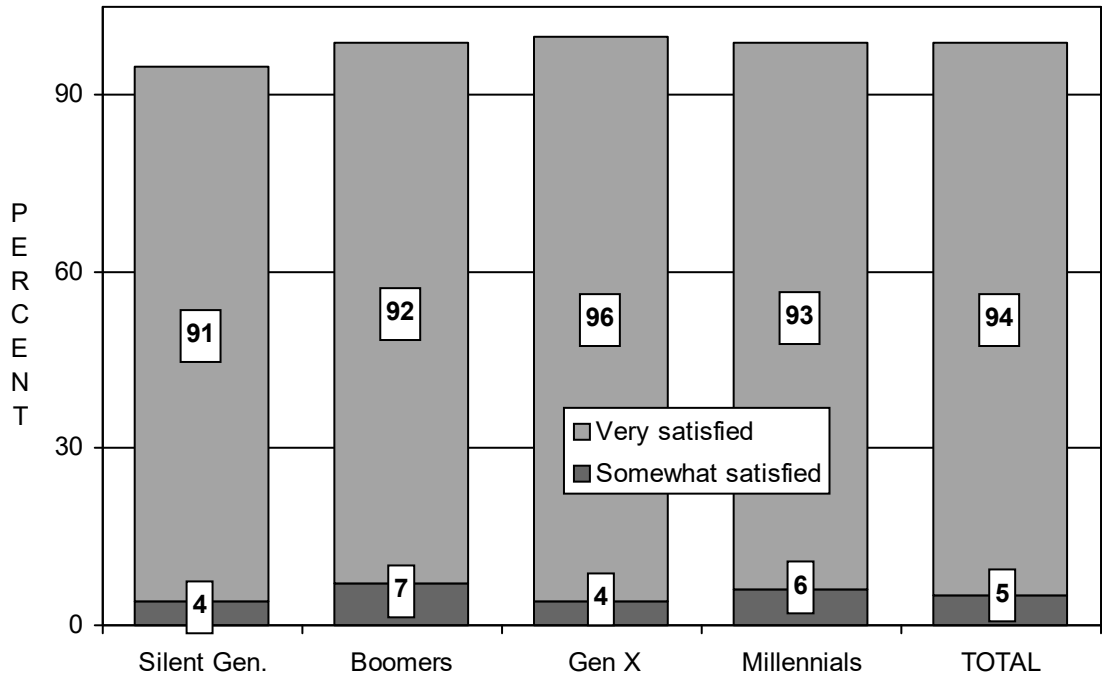
Only "yes" responses are reported in this figure.

Visitors were asked if they had been to a spa during their current visit to Las Vegas and 4% said they had. There were no differences between the subgroups on this measure.

* These results are from 2018. This question is asked every other year and was not asked in 2019.

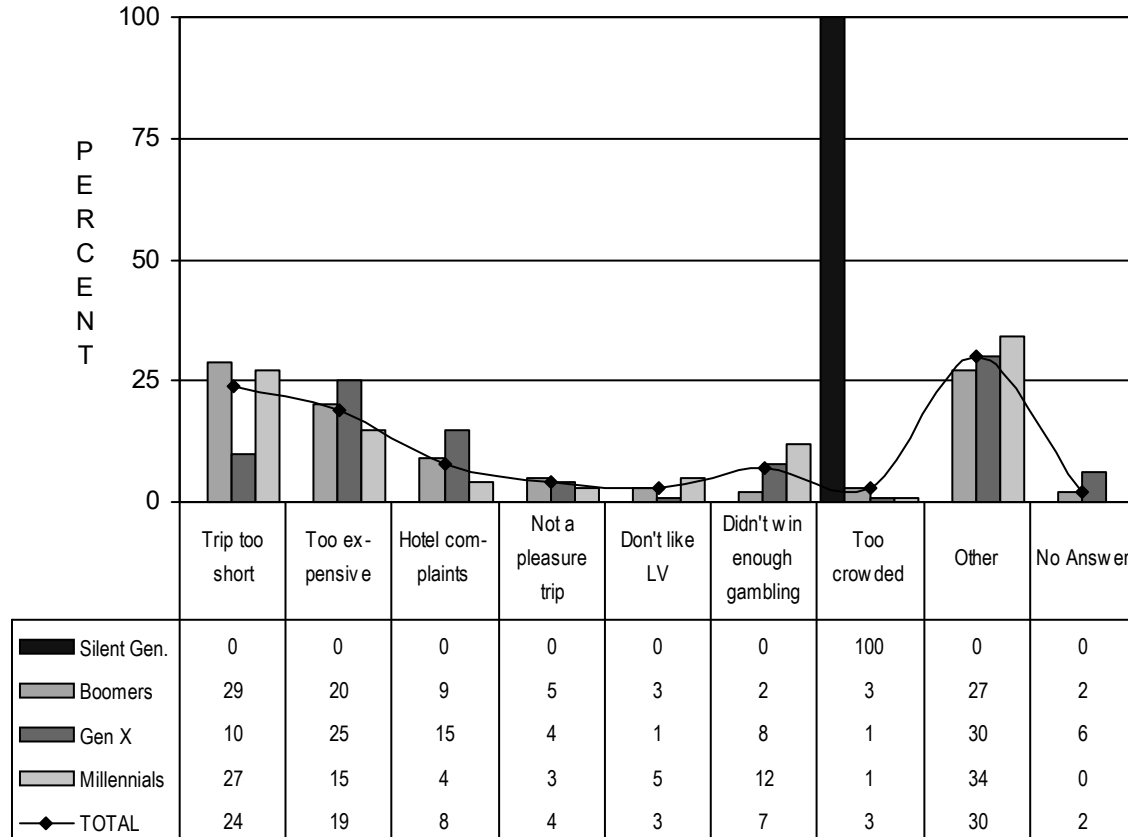
ATTITUDINAL INFORMATION

FIGURE 61
Satisfaction With Visit



Over nine in ten (94%) visitors were “very satisfied” with their visit to Las Vegas, while five percent (5%) were “somewhat” satisfied. Gen X visitors (96%) were more likely than Boomers (92%) or Millennials (93%) to say they were “very satisfied,” while Boomers (7%) and Millennials (6%) were more likely than Gen X visitors (4%) to say they were “somewhat satisfied.”

FIGURE 62
Why Not Completely Satisfied With Visit†
(Among Those Who Were “Somewhat” Satisfied)



(Base Sizes Silent Gen=2†, Boomers=69, Gen X=45, Millennials=76, TOTAL=192)

The above figure presents the key reasons why satisfaction levels were not higher among those visitors who were only "somewhat satisfied" with their visit. Among the most common reasons given were the trip was too short (24%) or the perception that Las Vegas is too expensive (19%). Both Boomers (29%) and Millennials (27%) were more likely than Gen X visitors (10%) to say that the trip was too short. Millennials (12%) were more likely than Boomers (2%) to say that they didn't win enough.

† Note the very small base size for the Silent Generation.

VISITOR DEMOGRAPHICS

With regards to visitor demographics, the Silent Generation and Boomers were the most likely to be:

- Retired (93% of the Silent Generation and 65% of Boomers vs. 1% for Gen X visitors and less than 1% for Millennials).
- Caucasian (87% of the Silent Generation and 84% of Boomers vs. 76% of Gen X visitors and 71% of Millennials).

Gen X visitors were the most likely to be:

- Employed (91% vs. 7% of the Silent Generation, 33% of Boomers and 81% of Millennials).
- Earning \$80,000 or more (53% vs. 35% of the Silent Generation, 41% of Boomers and 26% of Millennials).

Millennials were the most likely to be:

- Female (55% vs. 42% of the Silent Generation, 44% of Boomers and 46% of Gen X visitors).
- Single (42% vs. 8% of the Silent Generation, 5% of Boomers, and 12% of Gen X visitors).
- Students (10% vs. 0% among the Silent Generation and less than 1% among Boomers and Gen X visitors).
- Hispanic/Latino (15% vs. 4% of the Silent Generation 6% of Boomers and 11% of Gen X visitors).
- Earning \$20,000 to \$39,999 (16% vs. 0% of the Silent Generation, 4% of Boomers, and 7% of Gen X visitors).
- From California (26% vs. 10% of the Silent Generation, 17% of Boomers, and 20% of Gen X visitors).

FIGURE 63
VISITOR DEMOGRAPHICS

	Silent Gen.	Boomers	Gen X	Millennials	TOTAL
<u>GENDER</u>					
Male	58%	56%	54%	45%	51%
Female	42	44	46	55	49
<u>MARITAL STATUS</u>					
Married	78	86	79	56	73
Single	8	5	12	42	20
Separated/Divorced	0	5	8	2	5
Widowed	15	4	0	0	2
<u>JOB CATEGORIES</u>					
Employed	7	33	91	81	69
Unemployed	0	0	1	4	2
Student	0	0	0	10	4
Retired	93	65	1	0	21
Homemaker	0	2	6	5	5
<u>EDUCATION</u>					
High school or less	19	17	13	19	17
Some college/trade school	17	32	26	39	32
College graduate	64	51	61	42	51
<u>AGE</u>					
21 to 29	0	0	0	46	16
30 to 39	0	0	6	55	21
40 to 49	0	0	66	0	22
50 to 59	0	22	27	0	16
60 to 64	0	18	0	0	5
65 or older	100	60	0	0	19
MEAN	76.1	64.4	45.9	30.2	46.2
BASE	(49)	(1063)	(1218)	(1265)	(3599)

(Continued on next page)

FIGURE 64
VISITOR DEMOGRAPHICS

	Silent Gen.	Boomers	Gen X	Millennials	TOTAL
ETHNICITY					
White	87%	84%	76%	71%	77%
African American/Black	6	8	10	10	9
Asian/Asian American	3	2	3	3	3
Hispanic/Latino	4	6	11	15	11
Other	0	0	0	0	0
HOUSEHOLD INCOME					
Less than \$20,000	29	2	1	14	6
\$20,000 to \$39,999	0	4	7	16	9
\$40,000 to \$59,999	4	15	11	15	13
\$60,000 to \$79,999	18	21	14	11	15
\$80,000 or more	35	41	53	26	40
Not sure/no answer	15	17	15	18	17
VISITOR ORIGIN					
<u>U.S.A.</u>	<u>100</u>	<u>84</u>	<u>87</u>	<u>86</u>	<u>86</u>
Eastern states*	7	12	10	8	10
Southern states†	27	17	18	16	17
Midwestern states‡	23	14	13	10	12
<u>Western states§</u>	<u>41</u>	<u>41</u>	<u>46</u>	<u>52</u>	<u>47</u>
California	10	17	20	26	21
Southern CA	9	15	16	24	18
Northern CA	2	3	4	2	3
Arizona	24	8	9	9	9
Other West	7	15	17	16	16
Foreign	0	16	13	14	14
BASE	(49)	(1063)	(1218)	(1265)	(3599)

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

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

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

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