

LAS VEGAS VISITOR PROFILE

Calendar Year 2019

Downtown/Strip Corridor Version
(Location of Lodging)

Research that works.

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DOWNTOWN/STRIP VERSION
(LOCATION OF LODGING)

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VISITOR PROFILE STUDY

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DOWNTOWN/STRIP VERSION
(LOCATION OF LODGING)

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DOWNTOWN/STRIP VERSION
(LOCATION OF LODGING)

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DOWNTOWN/STRIP VERSION (LOCATION OF LODGING)

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.

Visitors who lodged Downtown and visitors who lodged in the Strip Corridor are the focus of this report. The tables and charts in this report show data for all visitors and for three visitor subgroups:

- **DOWNTOWN** — visitors who lodged Downtown during their visit — 6% of all visitors.
- **STRIP CORRIDOR*** — visitors who lodged on or just off the Strip — 73% of all visitors.
- **OTHER** — the remaining visitors — 21% of all visitors.

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

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

DOWNTOWN LODGERS

Visitors who lodged Downtown were more likely than those who lodged on the Strip Corridor to:

- Be visiting Las Vegas primarily to attend a special event (11%).
- Have taken ground transportation to Las Vegas (73%).
- Have taken the bus while in Las Vegas (31%).
- Have used magazines or newspapers to plan their trip to Las Vegas (37%).
- Have booked their flight through a travel agent (22%).
- Booked their accommodations in person (23%).
- Have paid a regular rate (78%) for their room.
- Have gambled during their visit (92%).
- Attended a sporting event while in Las Vegas (9%).
- Have been to a free-standing bar or lounge without a cover charge (40%).
- Be single (41%) and/or between 21-29 years old (34%).
- Be from the West region of the United States (55%), particularly from Arizona (13%).

During their visit to Las Vegas Downtown lodgers spent an average of:

- \$366.97 on food and drink.
- \$159.96 on shopping.
- \$41.63 on shows and entertainment.

STRIP CORRIDOR LODGERS

Visitors who lodged on the Strip Corridor were more likely than those who lodged Downtown to:

- Say the primary purpose of their current visit was to attend a convention, trade show, or corporate meeting (10%) or to gamble (16%).
- Have traveled to Las Vegas by air (55%).
- Have taken a taxi (24%), used a ride-sharing service (33%), and/or rode the Monorail (19%) during their visit.
- Have used websites (68%) and/or social media (41%) to plan their trip.
- Have booked their accommodations by calling the property directly (18%).
- Have booked their accommodations more than one month in advance (55%).
- Have paid a package or tour group rate (16%) or a convention rate (8%) for their room.
- Be staying longer in Las Vegas (3.5 nights).
- Have seen a big-name headliner show (16%) during their visit (among those visitors who saw shows).
- Be college educated (55%), married (74%), and have an annual household income of \$80,000 or more (45%).

During their visit to Las Vegas Strip Corridor lodgers spent an average of:

- \$459.76 on food and drink.
- \$205.31 on shopping.
- \$61.36 on shows and entertainment.

THOSE VISITORS WHO LODGED ELSEWHERE THAN DOWNTOWN OR THE STRIP CORRIDOR

Visitors who lodged elsewhere than the Downtown or the Strip Corridor, stayed with friends or relatives or were visiting Las Vegas on a day trip were more likely than those who lodged Downtown or on the Strip Corridor to:

- Have visited Las Vegas before (81%).
- Say the primary purpose of their current visit was to visit friends or relatives (25%) or they were just passing through (27%).
- Have driven their own vehicle while in Las Vegas (69%).
- Have planned their trip less than a week in advance (25%).
- Have booked their accommodations less than a week in advance (38%).
- Be traveling with two adults (75%) and/or with people under 21 years old in their party (9%).
- Have stayed one night in Las Vegas (33%).

During their visit to Las Vegas those who lodged elsewhere than Downtown and the Strip Corridor spent: an average of:

- \$251.48 on food and drink.
- \$132.80 on shopping.
- \$20.67 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, unless otherwise specified. In charts using proportions, those proportions may not add to 100% because of rounding or because multiple responses were permitted.

When we note that a difference between subgroups for a particular measure is larger (or smaller) we mean that there is a 95% or better chance that the difference is the result of a true difference between the subgroups and is not due to sampling error alone. This is a commonly accepted standard for statistical significance testing in market and public opinion research. We do not note any subgroup differences that do not meet this standard for statistical significance.

Visitors who lodged Downtown and visitors who lodged in the Strip Corridor are the focus of this report. Statistically significant differences in the behavior, attitudes, and opinions by lodging location are pointed out in the text of the report.

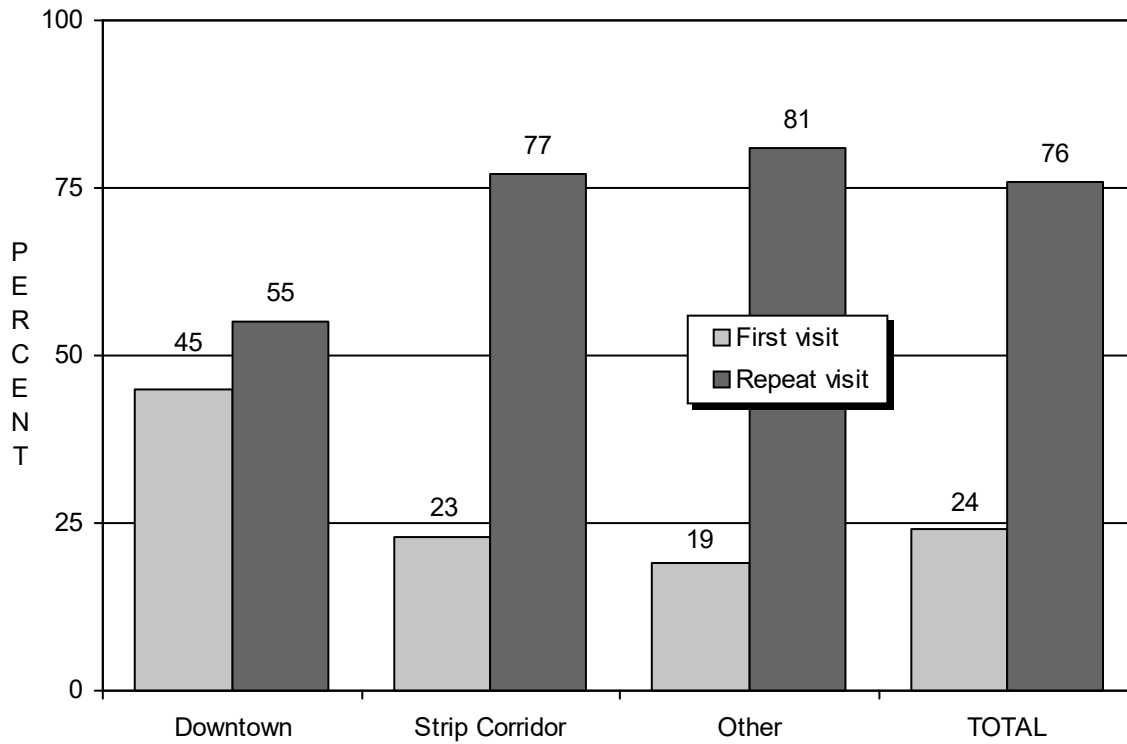
In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2019. These questions will be rotated back into the questionnaire in Calendar Year 2020 and subsequently asked every other year. These questions are noted in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

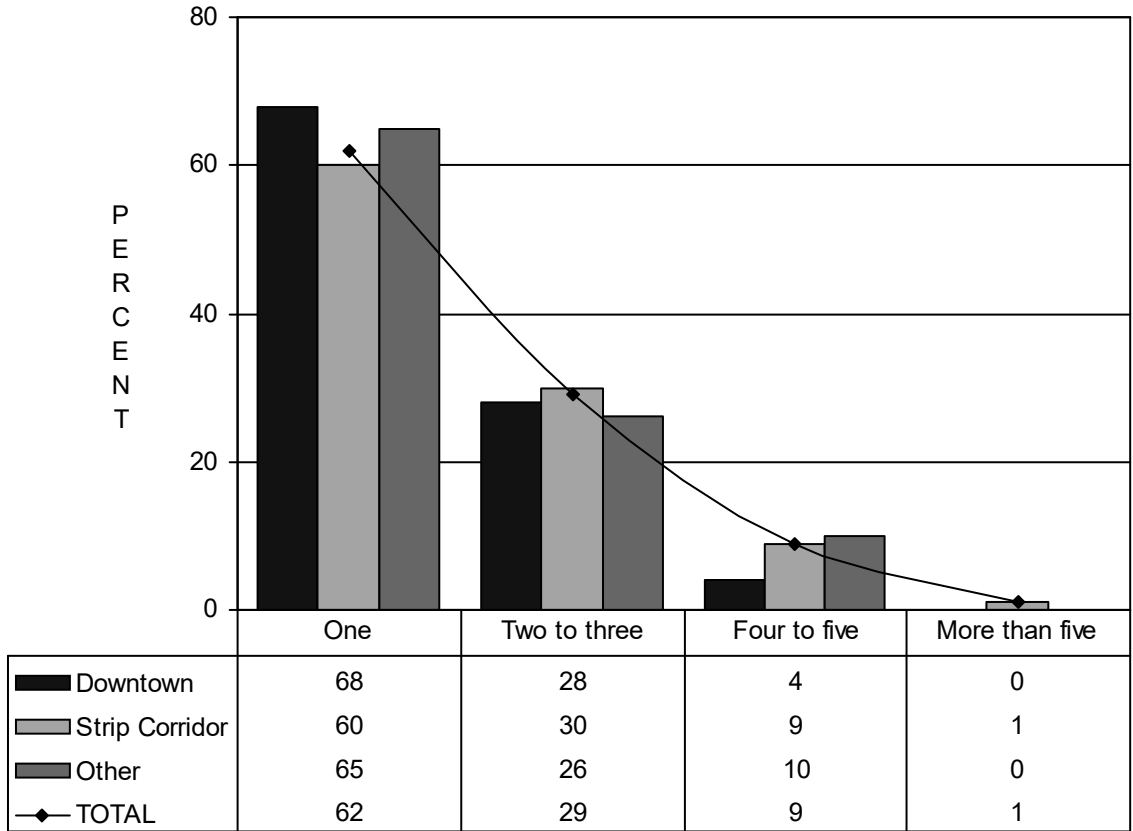
REASONS FOR VISITING

FIGURE 1
First Visit Vs. Repeat Visit



Three-fourths (76%) of visitors said they have visited Las Vegas in the past. Downtown lodgers (45%) were the most likely to be first-time Las Vegas visitors while Other area lodgers (19%) were the least likely to be first-time visitors.

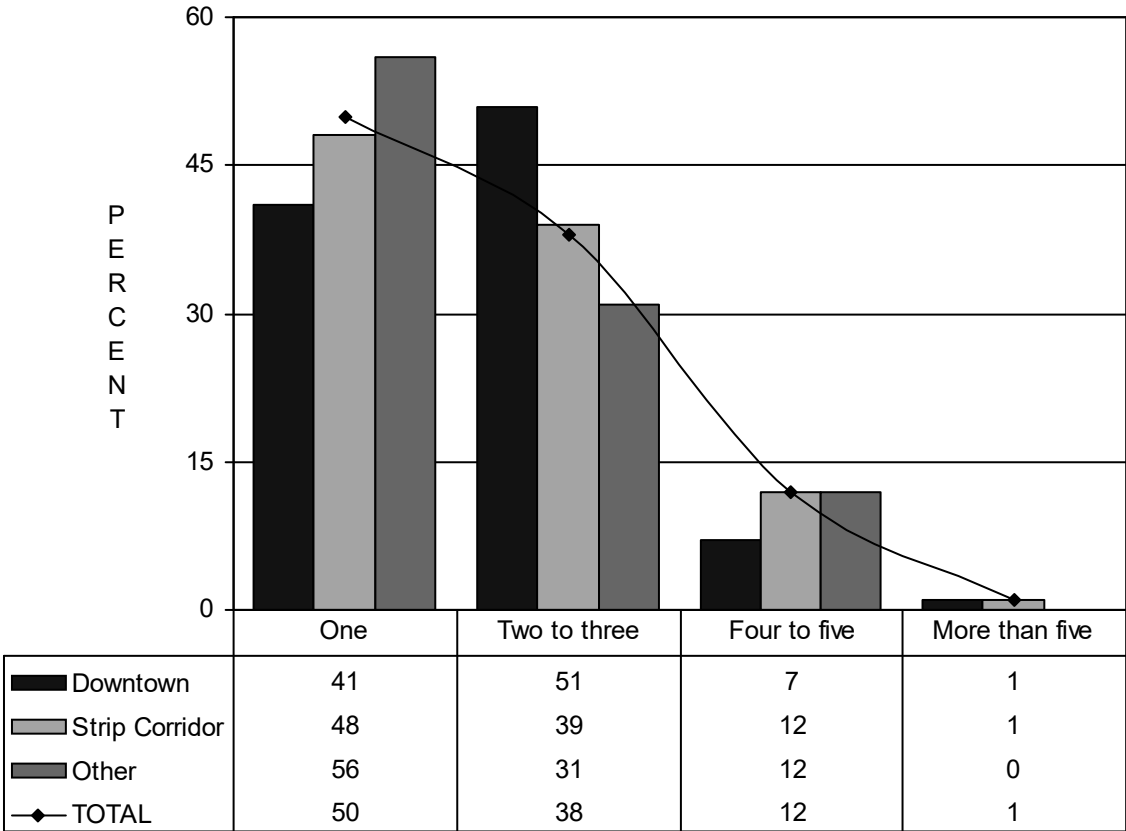
FIGURE 2
Frequency Of Visits In Past Year
(Among All Visitors)



(Means: Downtown=1.5, Strip Corridor=1.8, Other=1.7, TOTAL=1.7)

Among all visitors, the average number of visits to Las Vegas in the past year was 1.7. On average, those visitors lodging on the Strip Corridor (1.8 visits) made more visits in the past year than Downtown lodgers (1.5 visits).

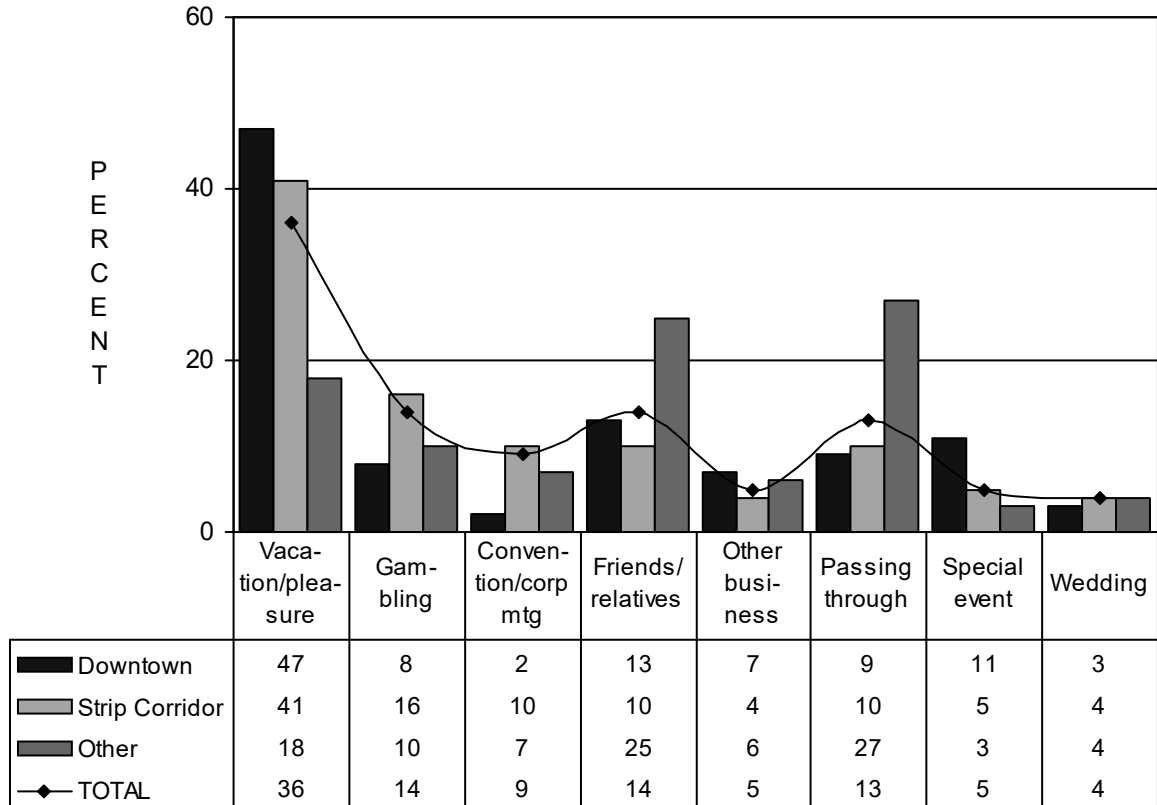
FIGURE 3
Frequency Of Visits In Past Year
(Among Repeat Visitors)



(Base Sizes: Downtown=109, Strip Corridor=2022, Other=618, TOTAL=2748)
(Means: Downtown=1.9; Strip Corridor=2.0, Other=1.8, TOTAL=2.0)

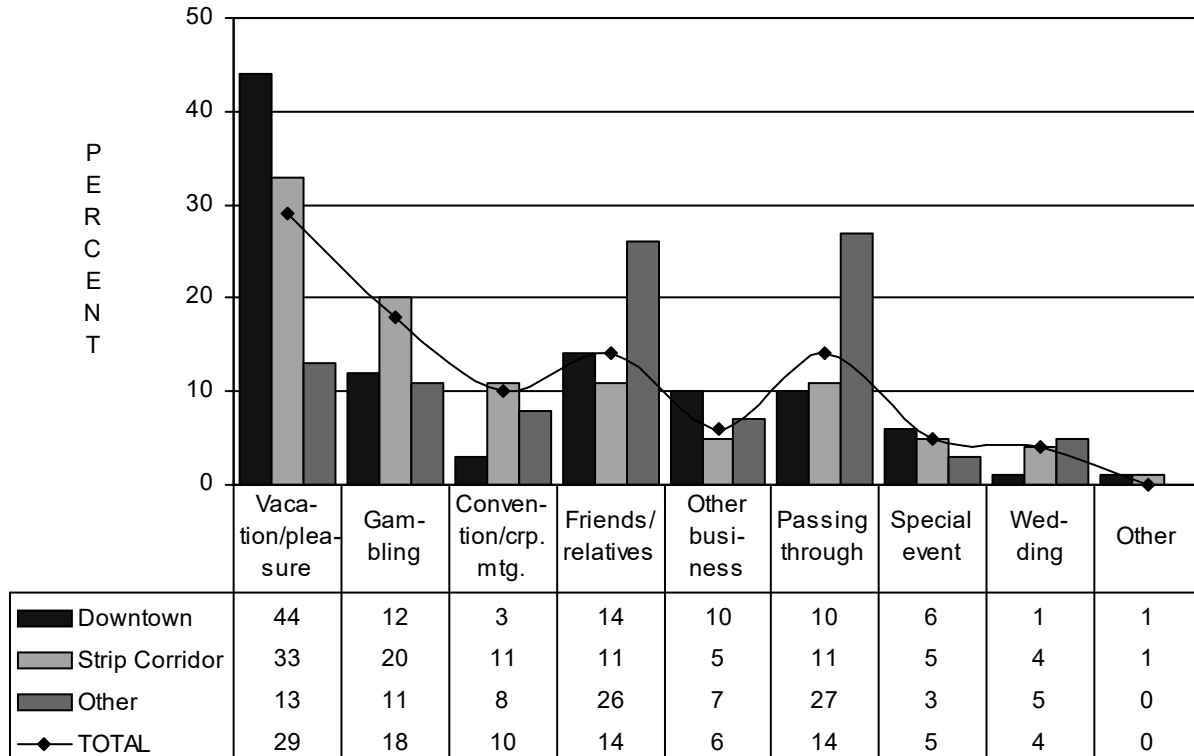
Among repeat visitors, the average number of visits to Las Vegas in the past year was 2.0. On average, Strip Corridor lodgers (2.0 visits) visited more frequently in the past year than those lodging outside of the Strip Corridor or Downtown areas (1.8 visits).

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



When asked about the primary purpose of their current visit to Las Vegas, Downtown (47%) and Strip Corridor lodgers (41%) were more likely to mention vacation or pleasure than those who lodged elsewhere (18%). Other lodgers were the most likely segment to be visiting Las Vegas to see friends or relatives (25% vs. 10% for Strip Corridor lodgers and 13% for Downtown lodgers) or were just passing through (27% vs. 10% for Strip Corridor lodgers and 9% for Downtown lodgers). Downtown lodgers (11%) were the most likely to say they were primarily in town to attend a special event while other lodgers (3%) were the least likely to give this reason. Strip Corridor lodgers (16%) were the most likely to be visiting Las Vegas to gamble or for a convention or corporate meeting (10%). Downtown lodgers (2%) were the least likely to be visiting for a convention or corporate meeting.

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

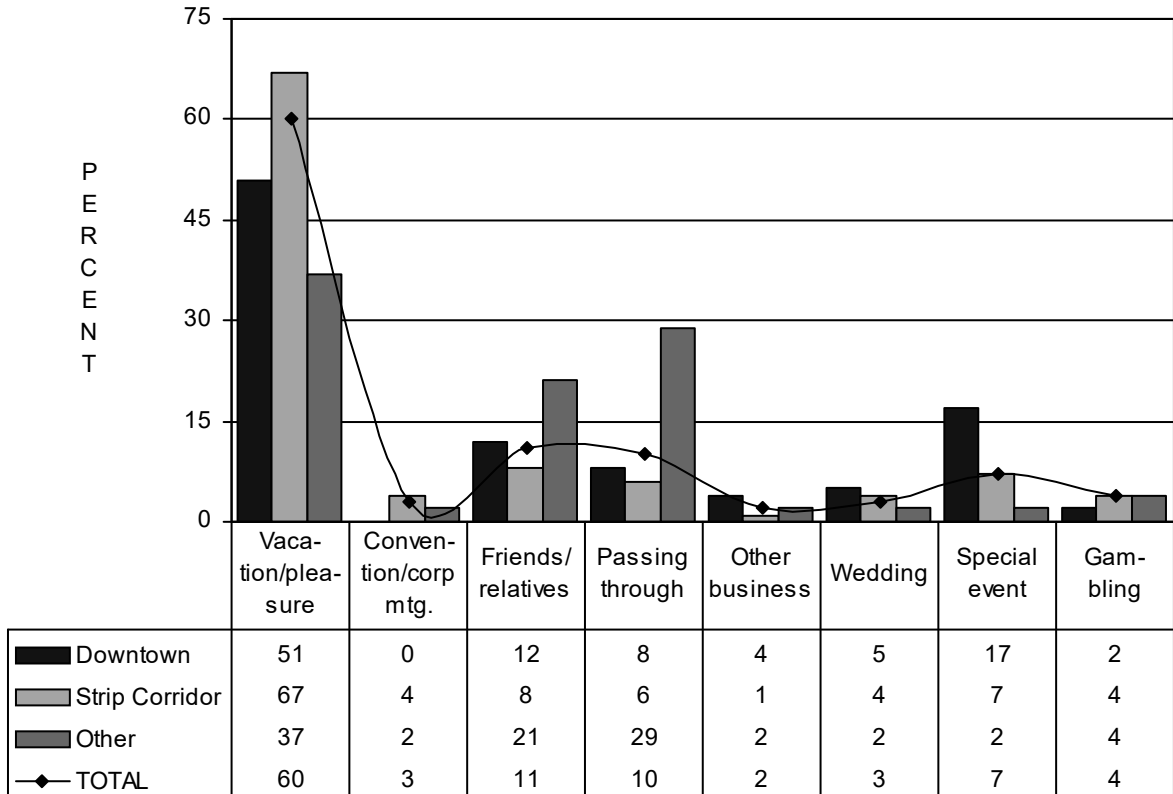


(Base Sizes: Downtown=109, Strip Corridor=2022, Other=618, TOTAL=2748)

Looking at the primary purpose of their current visit to Las Vegas among repeat visitors, Downtown (44%) and Strip Corridor lodgers (33%) were more likely to mention vacation or pleasure than those who lodged elsewhere (13%). Other lodgers were most likely segment to be visiting Las Vegas to see friends or relatives (26% vs. 11% for Strip Corridor lodgers and 14% for Downtown lodgers) or were just passing through (27% vs. 11% for Strip Corridor lodgers and 10% for Downtown lodgers). Strip Corridor lodgers (11%) were the most likely segment to be visiting Las Vegas for a convention or corporate meeting while Downtown lodgers (3%) were the least likely to have done so. Strip Corridor lodgers (20%) were also the most likely segment to be visiting Las Vegas primarily to gamble.

FIGURE 6

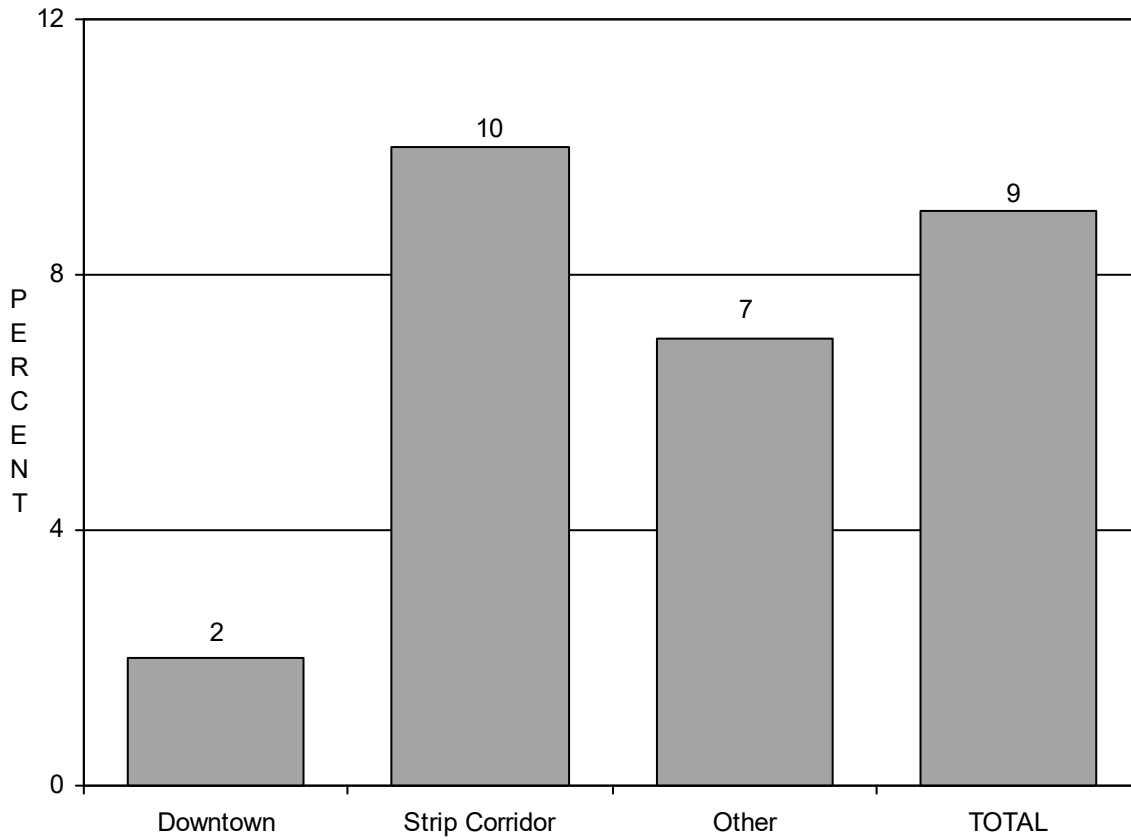
Primary Purpose Of Current Visit
(Among First-Time Visitors)



(Base Sizes: Downtown=89, Strip Corridor=619, Other=143 TOTAL=851)

We also looked at the primary purpose of the current visit among those who were making their first trip to Las Vegas. Strip Corridor lodgers (67%) were the most likely segment to be visiting primarily for vacation or pleasure. Other lodging visitors (29%) were the most likely segment to say their primary purpose was just passing through. Downtown lodgers (17%) were the most likely segment to say they were visiting to attend a special event.

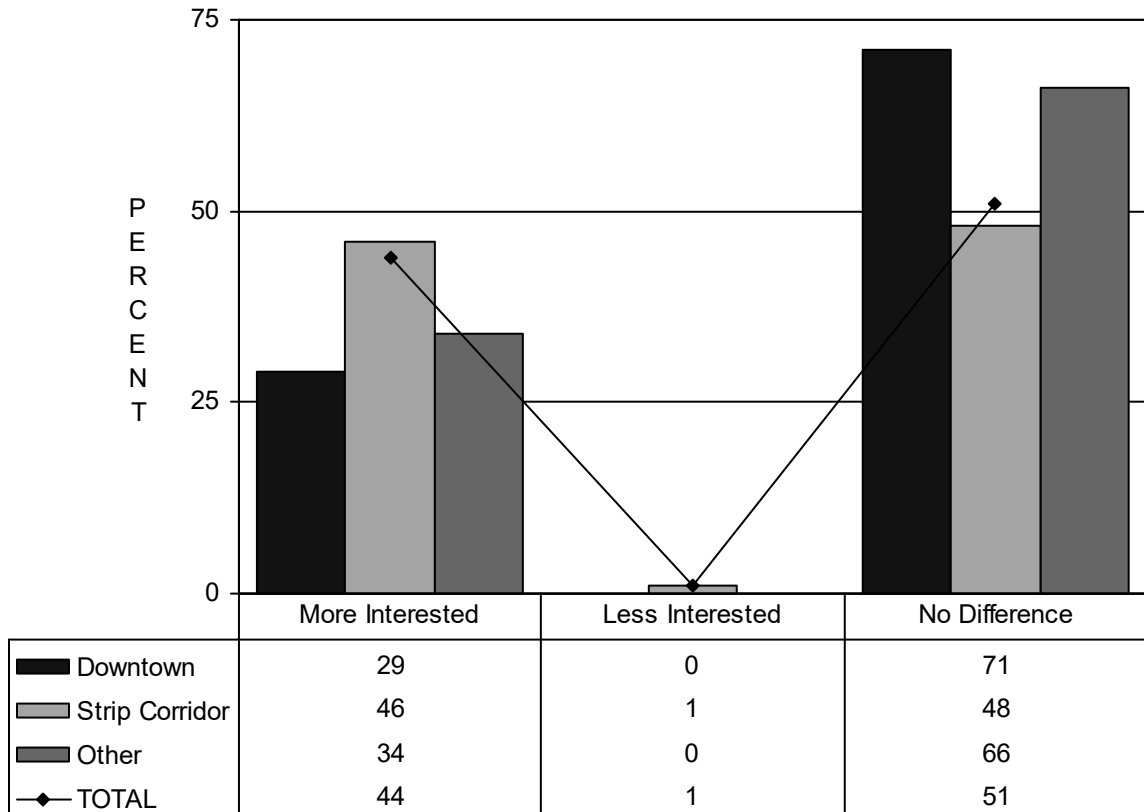
FIGURE 7
Conventions/Trade Shows/Associations/Corporate Meetings



Only "yes" responses are reported in this figure.

Respondents were asked if they participated in or attended a convention, trade show, association or corporate meeting while they were in Las Vegas. Strip Corridor lodgers (10%) were the most likely segment to have done so while Downtown lodgers (2%) were the least likely.

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

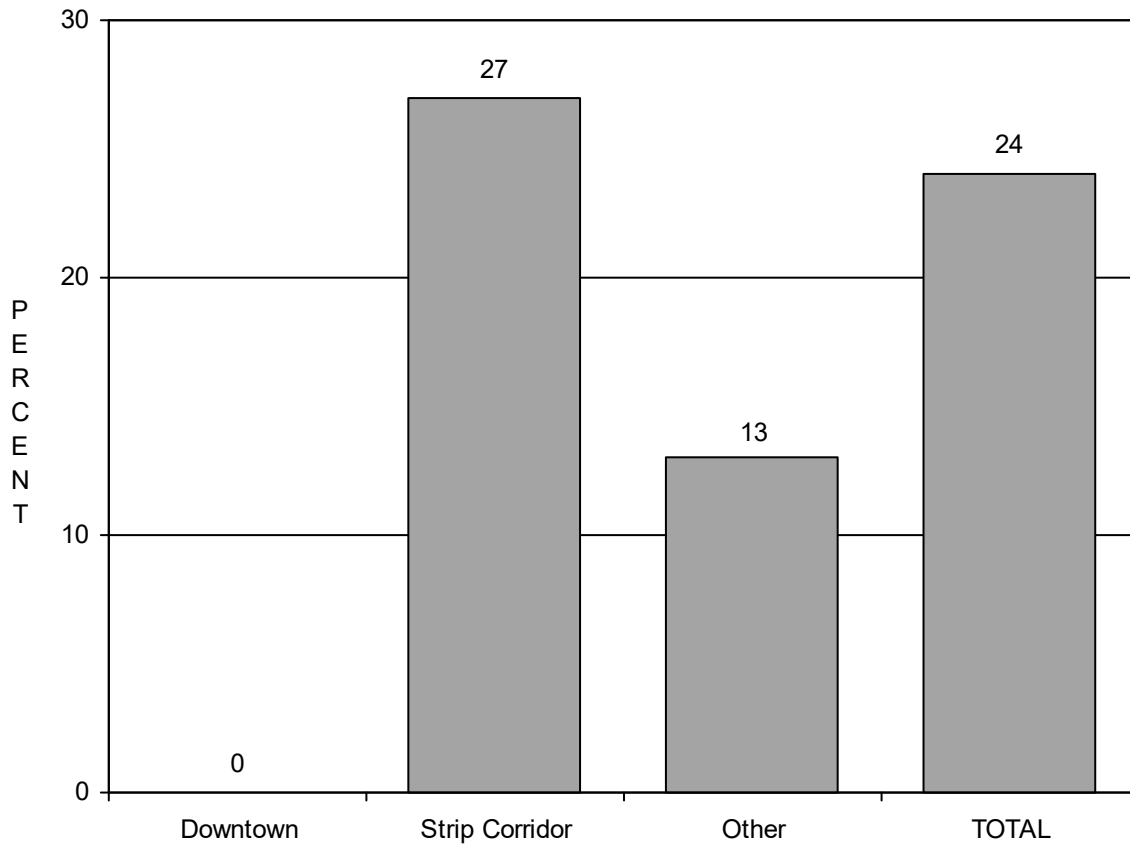


(Base Sizes: Downtown=3*, Strip Corridor=260, Other=51, TOTAL=313)

Convention visitors were asked if holding a convention in Las Vegas made them more or less interested in attending the convention — or if it made no difference. In 2019, 44% said having the convention in Las Vegas made them more interested in attending, while 51% said it made no difference. There were no statistically significant differences between the segments on these measures.

* Note the small base sizes for Downtown lodgers.

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



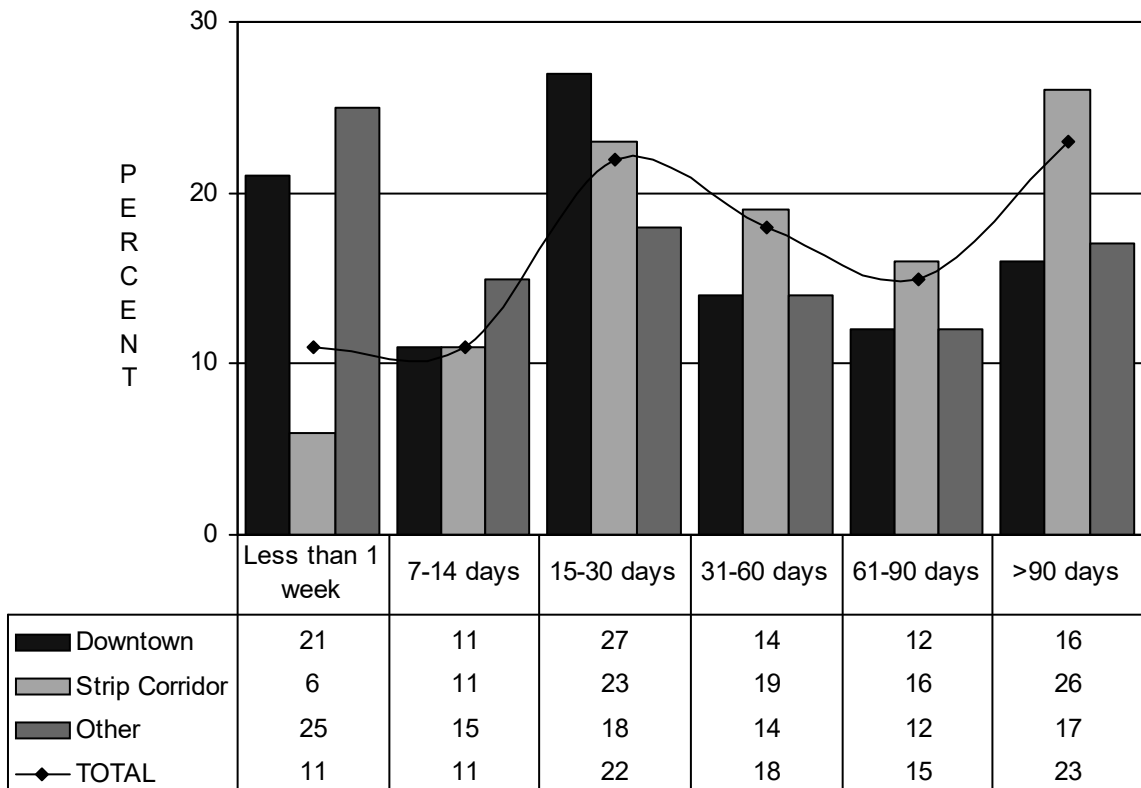
Only "yes" responses are reported in this figure.
(Base Sizes: Downtown=3*, Strip Corridor=260, Other=51, TOTAL=313)

Convention visitors were also 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%) of these visitors said they had. There were no statistically significant differences between the segments on this measure.

* Note the small base sizes for Downtown lodgers.

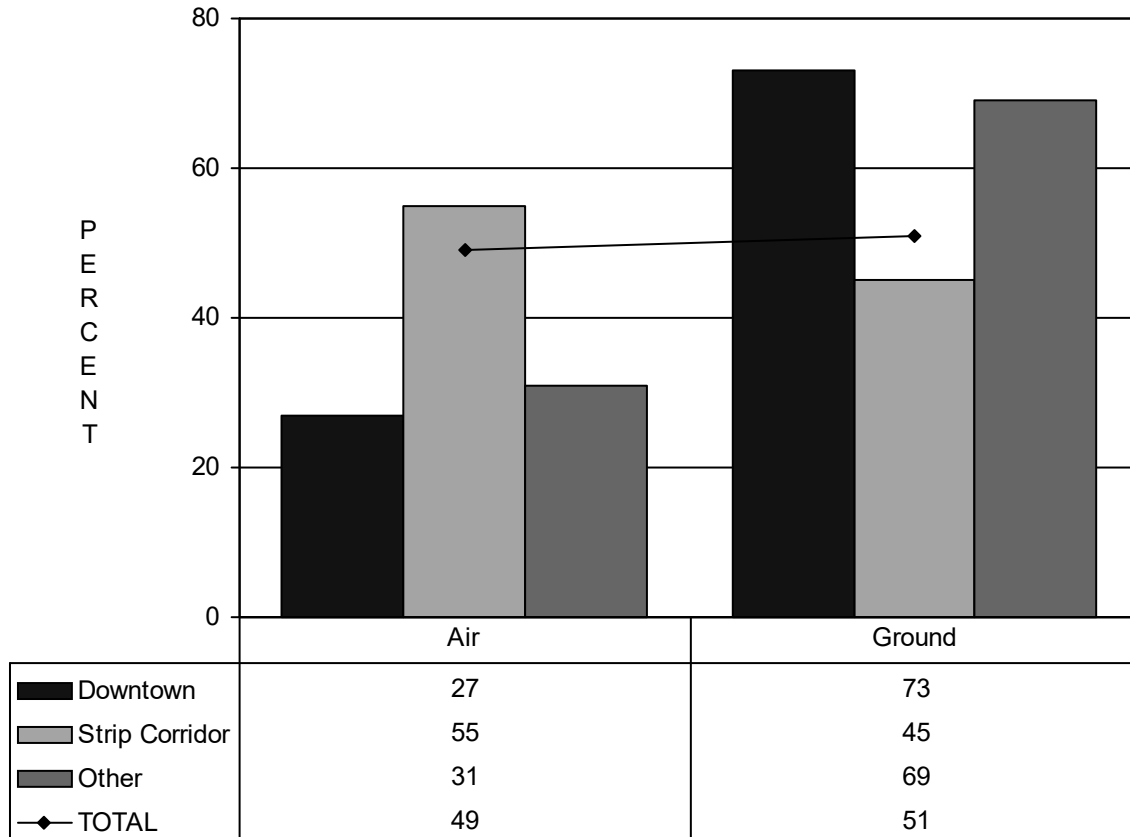
TRAVEL PLANNING

FIGURE 10
Advance Travel Planning



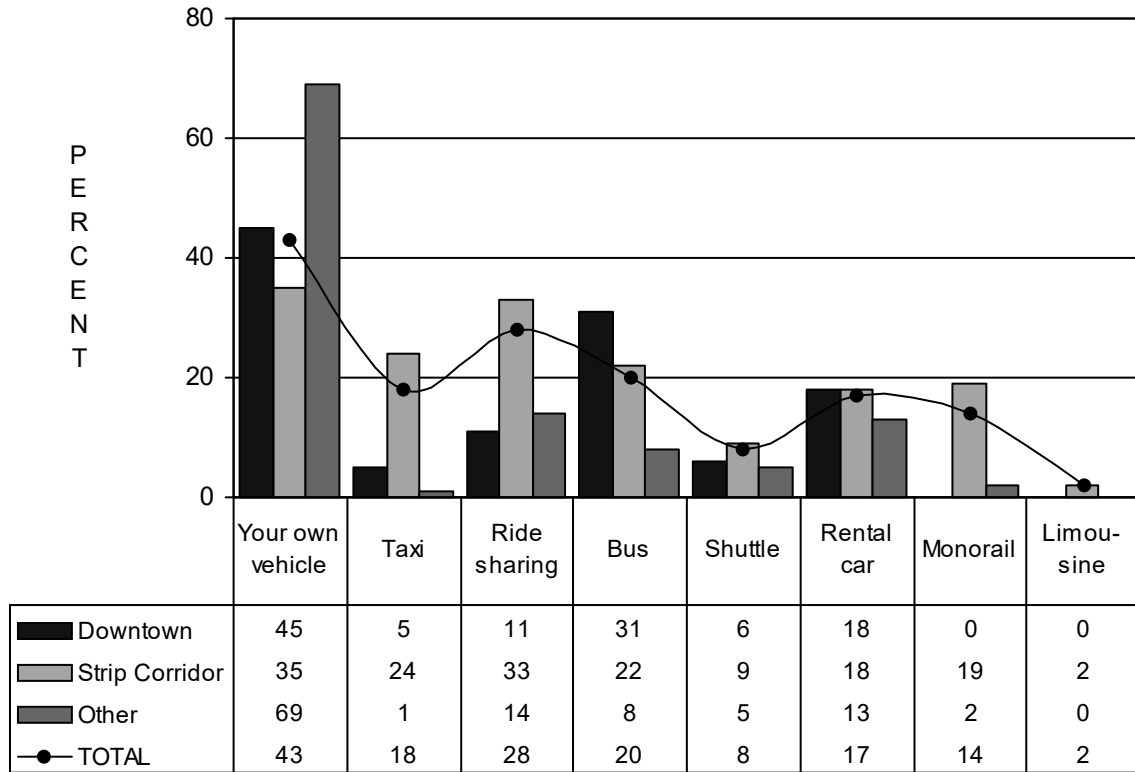
Over one-half (56%) of visitors in 2019 planned their trip to Las Vegas more than one month in advance. Those visitors lodging elsewhere (25%) and Downtown lodgers (21%) were both more likely to have planned their trips less than one week in advance than Strip Corridor lodging visitors (6%). Conversely, one-fourth (26%) of Strip Corridor lodgers planned their trips more than 90 days in advance, more than visitors lodging at places other than the Strip Corridor or Downtown (17%) and Downtown lodging visitors (16%).

FIGURE 11
Transportation To Las Vegas



Strip Corridor lodgers (55%) were more likely than Downtown lodgers (27%) or other lodgers (31%), to have traveled to Las Vegas by air. Conversely, those visitors lodging elsewhere (69%) and Downtown lodgers (73%) were more likely than Strip Corridor lodgers (45%), to have used ground transportation to travel to Las Vegas.

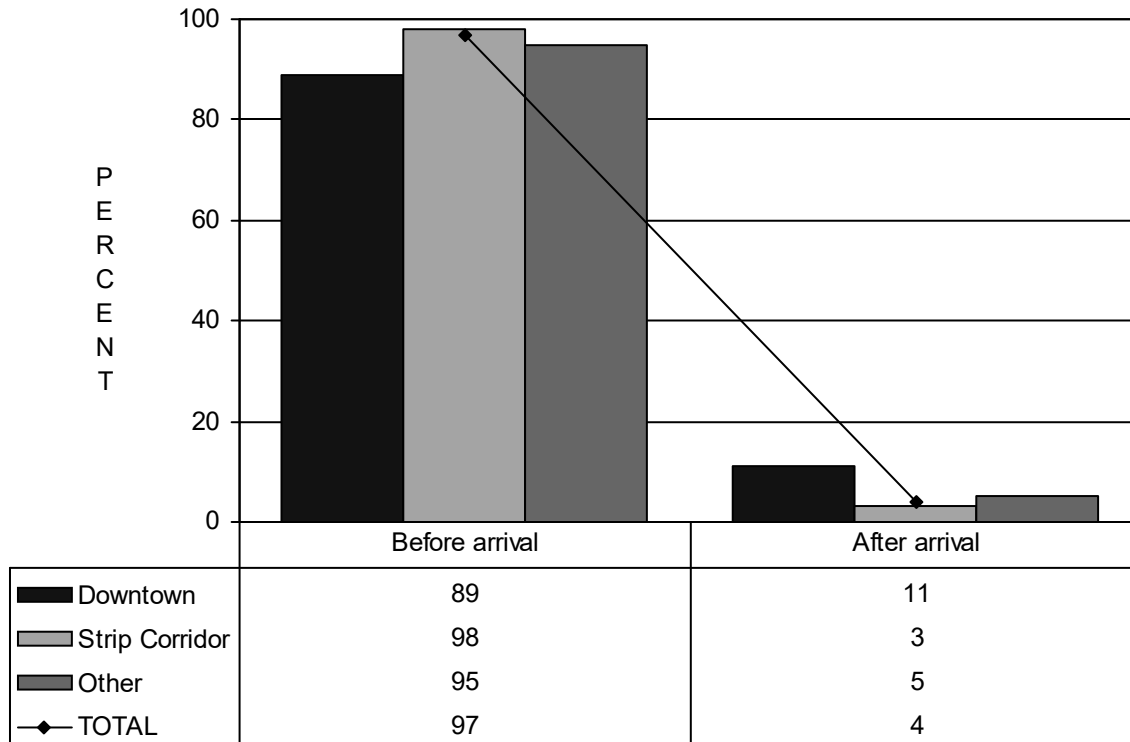
FIGURE 12
Local Transportation



Multiple responses permitted

Visitors were asked about the types of local transportation they had used while on their current visit to Las Vegas. Visitors who lodged somewhere other than Downtown or the Strip Corridor (69%) were more likely than those lodging Downtown (45%), who in turn were more likely than Strip Corridor lodgers (35%), to say they used their own vehicle to get around Las Vegas. Downtown lodgers (31%) were the most likely segment to have used the Bus while other lodging visitors (8%) were the least likely to have done so. Strip Corridor Lodgers were the most likely segment to use several forms of local transportation including a ride sharing service (33%), taxis (24%), and/or the Monorail (19%).

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

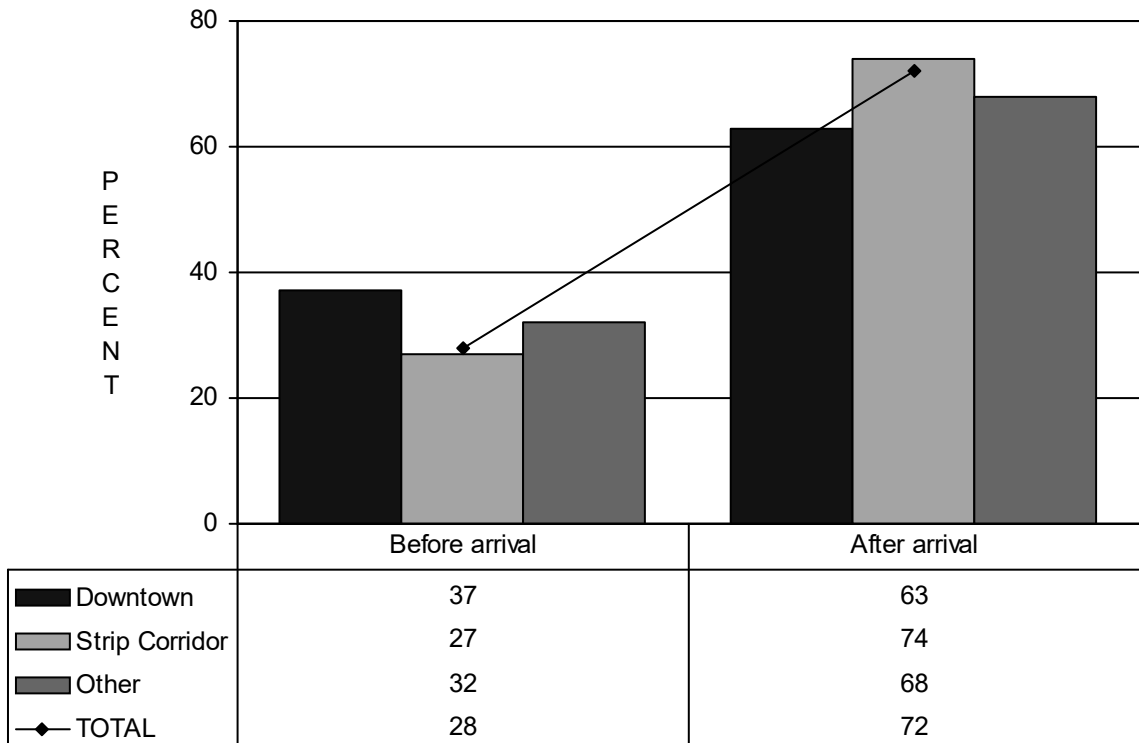


(Base Sizes: Downtown=182, Strip Corridor=2624, Other=779, TOTAL=3584)

Most visitors (97%) decided where to stay before arriving in Las Vegas. Strip Corridor lodgers (98%) were more likely than Other lodgers (95%), who in turn were more likely than Downtown lodgers (89%), to say they decided where to stay before they arrived.

* 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)

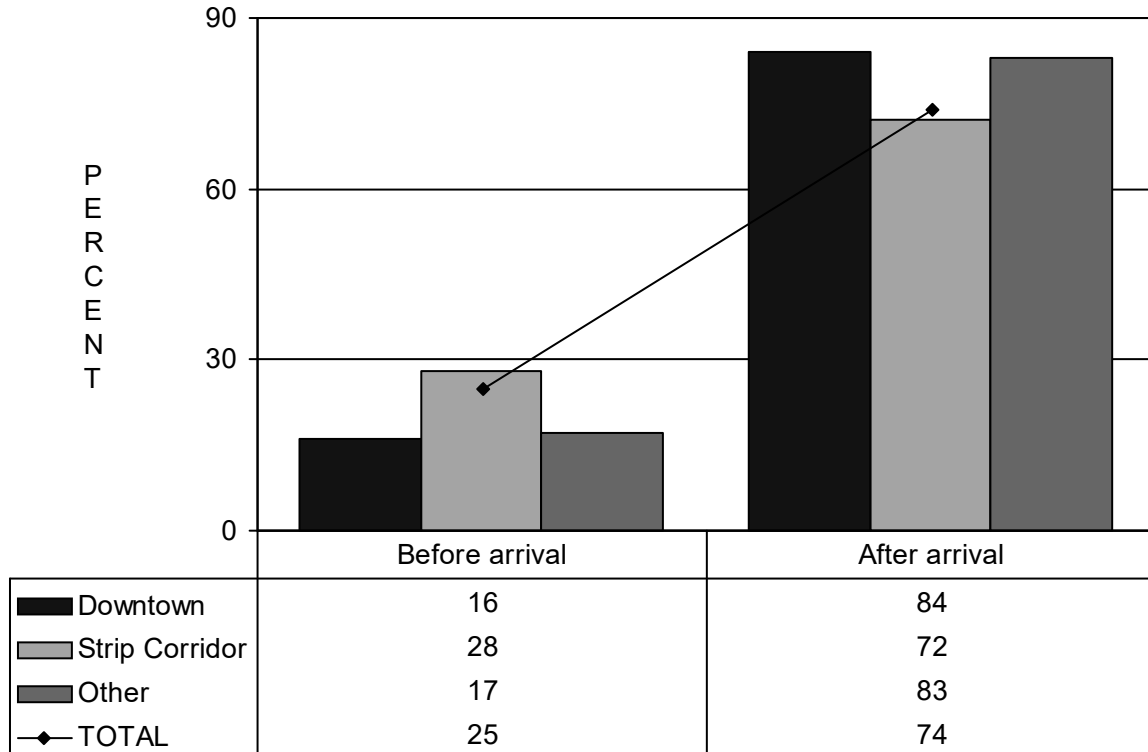


(Base Sizes: Downtown=169, Strip Corridor=2051, Other=459, TOTAL=2679)

Nearly three-fourths (72%) of all visitors decided where to gamble after arriving in Las Vegas. Strip Corridor lodgers (74%) were more likely than visitors lodging Downtown (63%) to say they decided where to gamble after 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)

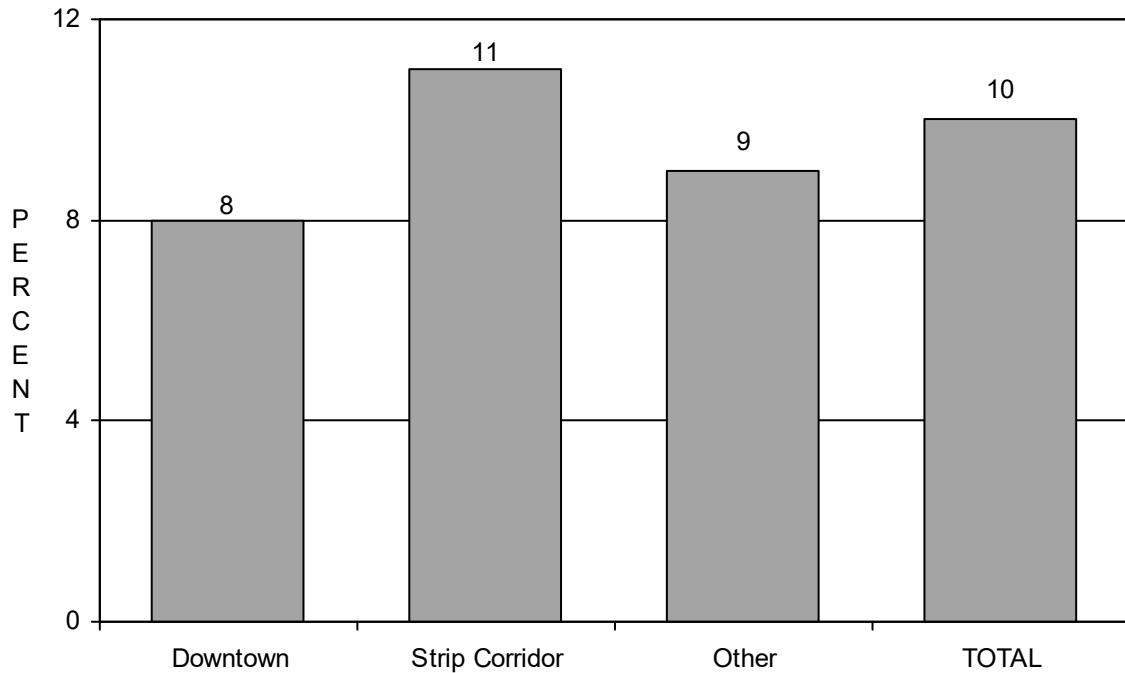


(Base Sizes: Downtown=112, Strip=1651, Other=333, TOTAL=2096)

Nearly three-fourths (74%) of all visitors said they decided which shows to see after their arrival. Downtown (84%) and Other lodgers (83%) were both more likely than Strip Corridor lodgers (72%) to say they decided which shows to see after they arrived.

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

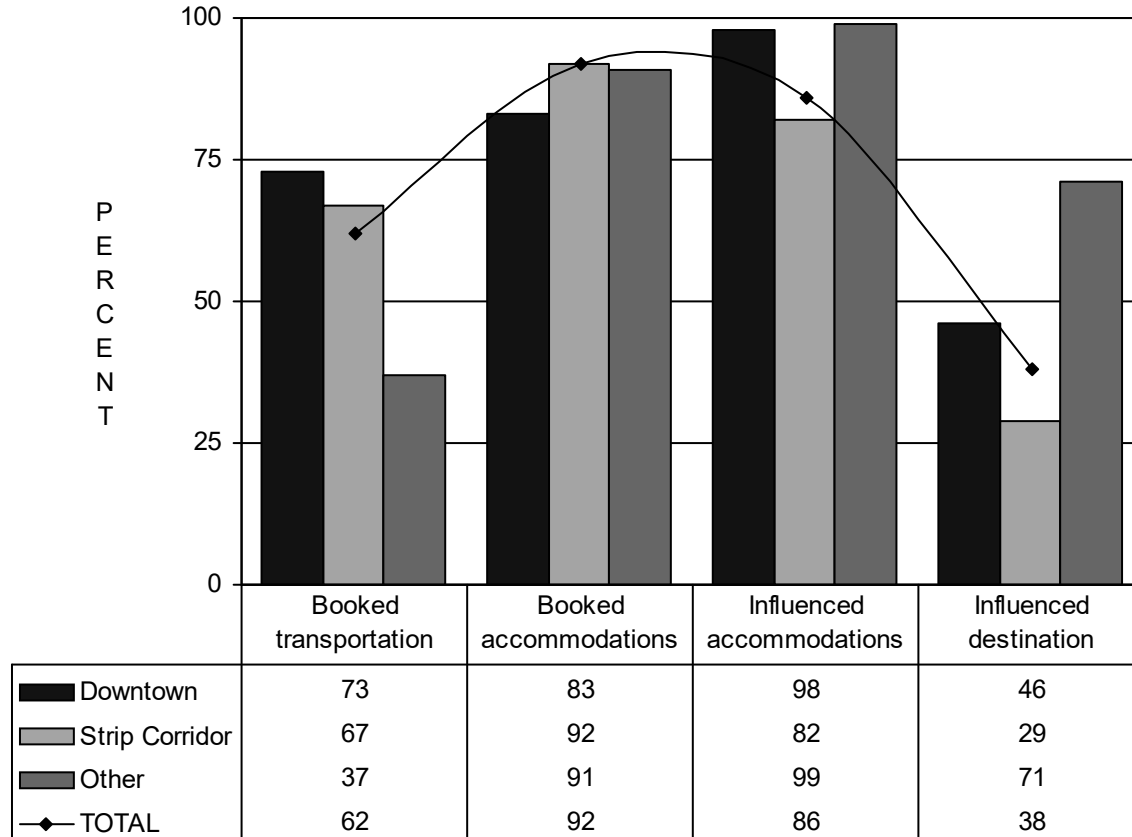
FIGURE 16
Travel Agent Assistance



Only "yes" responses are reported in this figure.

Overall, 10% of visitors reported using a travel agent to help them plan their most recent trip to Las Vegas. There were no statistically significant differences among the segments on this measure.

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

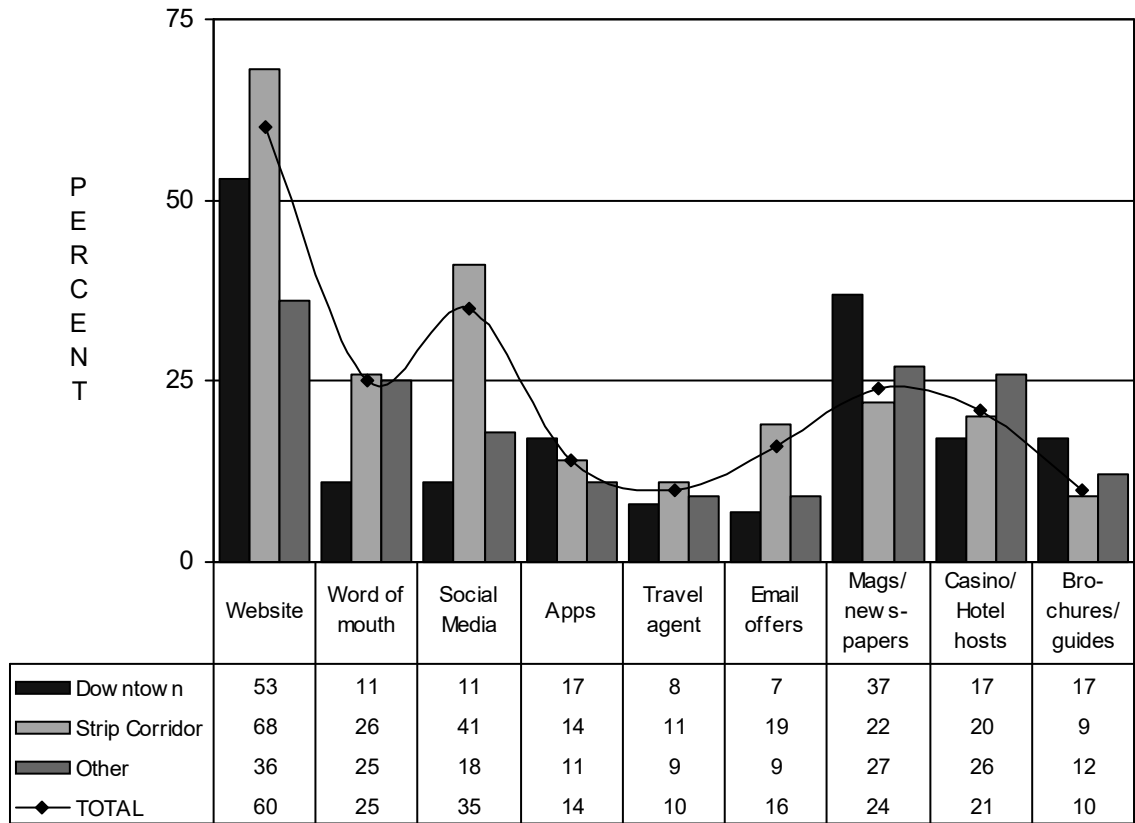


Multiple responses permitted
(Base Sizes: Downtown*=16, Strip Corridor=285, Other=66, TOTAL=367)

Among those visitors who used a travel agent, about six in ten (62%) said the travel agent helped book their transportation to Las Vegas and over nine in ten (92%) said the travel agent helped book their accommodations in Las Vegas. About four in ten (38%) also said the travel agent influenced their choice of destination. Strip Corridor lodgers (82%) were the least likely segment to say the travel agent influenced their choice of accommodations while Other lodgers (71%) were the most likely segment to say the travel agent influenced their destination choice.

* Note small base sizes for both downtown and other visitors.

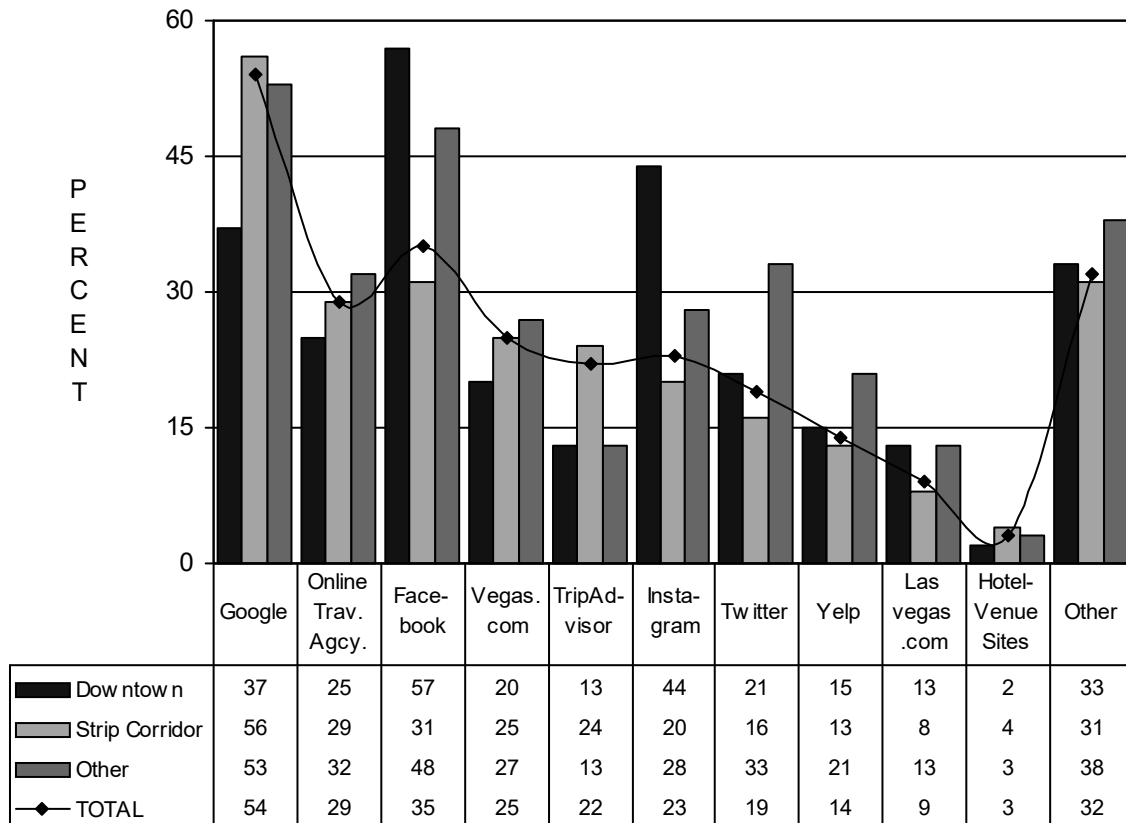
FIGURE 18
Tools Used In Planning Trip To Las Vegas



Multiple responses permitted.

Visitors were asked what tools they used to plan their trip to Las Vegas. Over two-thirds said they used some type of online tool, either a website (60%), social media (35%), or an app (14%). Downtown lodgers were the most likely segment to use magazines or newspapers (37%) and the least likely segment to use word of mouth (11%) in planning their trip to Las Vegas. Visitors lodging outside of Downtown or the Strip Corridor were the most likely segment to use casino/hotel hosts (26%) and the least likely segment to use websites (36%). Strip Corridor lodgers were the most likely segment to use several of these tools including websites (68%), social media (41%), and email offers (19%) and the least likely segment to use magazines or newspapers (22%).

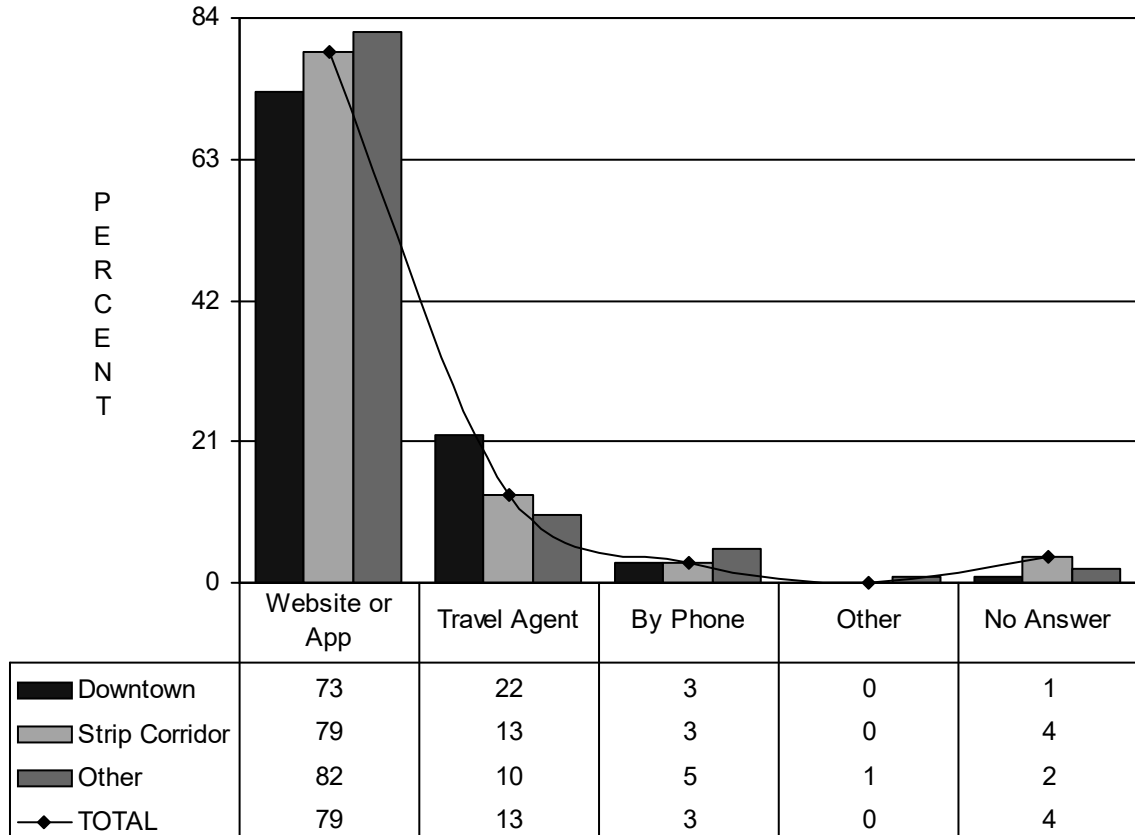
FIGURE 19
Social Media And Travel Review Apps Or Websites Used In Planning Trip To Las Vegas
(Among Those Who Used Websites, Social Media, Or Apps To Plan Trip)



Multiple responses permitted
(Base Sizes: Downtown=123, Strip Corridor=1967, Other=375, TOTAL=2464)

Visitors who said they used a website, social media, or apps in planning their trip (over two-thirds of all visitors) were asked which social media or travel review apps they used. Over one-half (54%) said they used Google while about one-third (35%) said they used Facebook and three in ten (29%) said they consulted reviews at online travel agencies. Strip Corridor lodgers were the most likely segment to use TripAdvisor (24%) and the least likely segment to use Facebook (31%). Downtown lodgers were the most likely segment to use Instagram (44%) and the least likely segment to use Google (37%). Other lodging visitors were the most likely segment to use Twitter (33%).

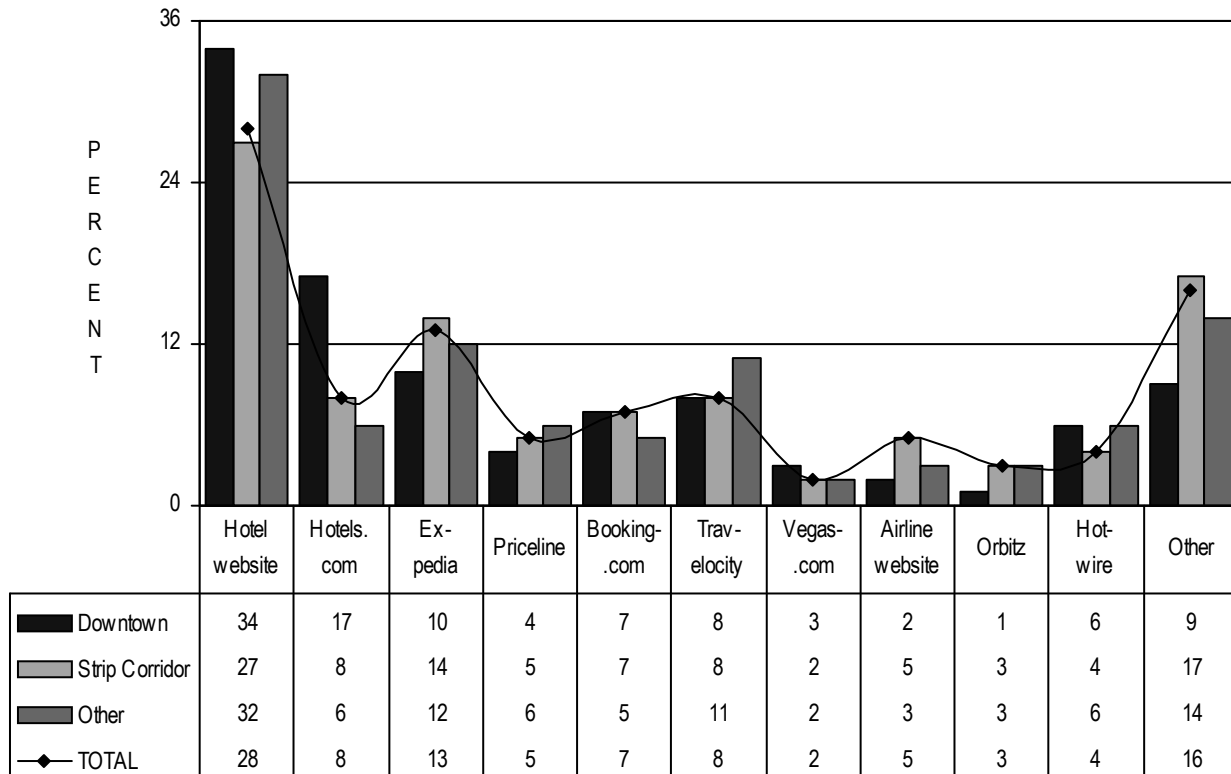
FIGURE 20
How Booked Flight To Las Vegas
(Among Those Who Used The Internet To Plan Trip)



(Base Sizes: Downtown=54, Strip Corridor=1462, Other=236, TOTAL=1752)

Visitors who arrived in Las Vegas by air were asked how they booked their flight. Eight in ten (79%) said they used a website (69%) or an app (10%). Thirteen percent (13%) said they used a travel agent, and 3% said they booked their flight by phone. Downtown lodgers were the most likely segment to say they used a travel agent (22%) and the least likely segment to say they used a website or app (73%).

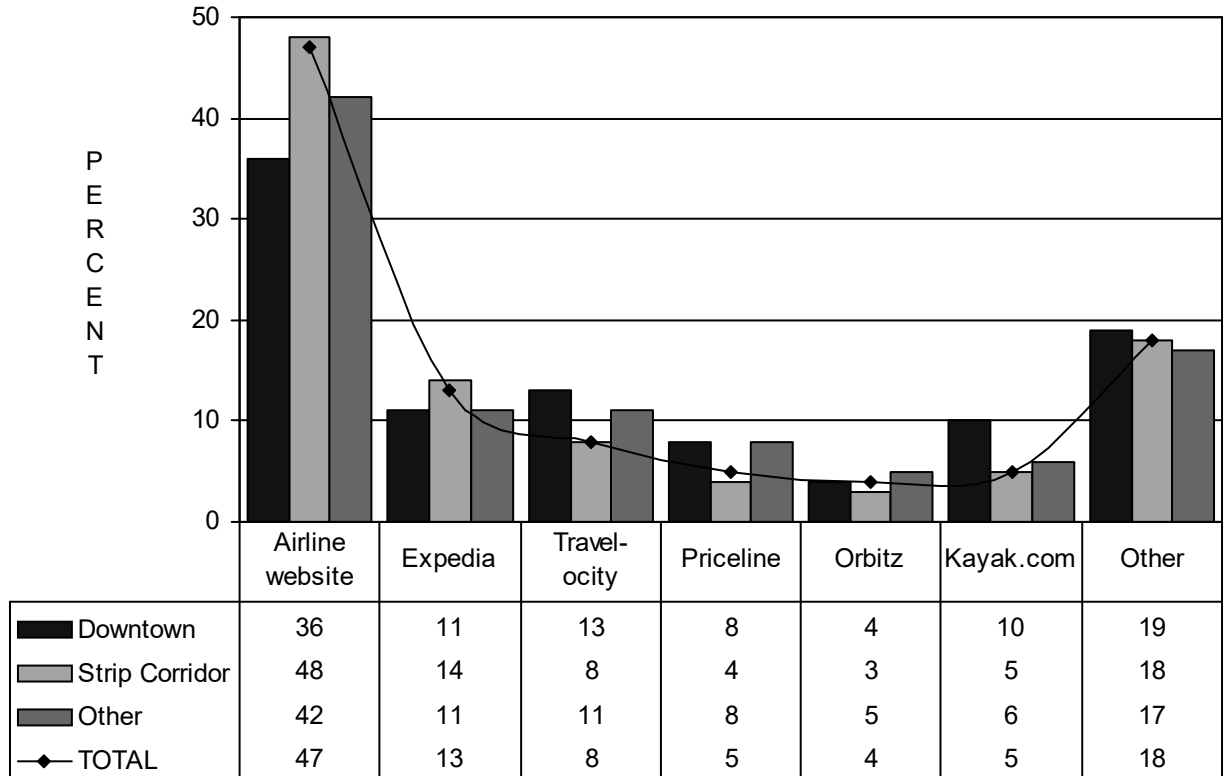
FIGURE 21
Website Or App Used To Book Accommodations
(Among Those Who Used The Internet
To Book Their Accommodations In Las Vegas)



(Base Sizes: Downtown=119, Strip Corridor=1442, Other=227, TOTAL=1788)

Respondents who had used a website or app to book their accommodations in Las Vegas were asked to name the website or app they used. Nearly three in ten (28%) of these visitors said they used a hotel website to do so. Downtown Lodgers (17%) were the most likely segment to say that they used Hotels.com to book their accommodations.

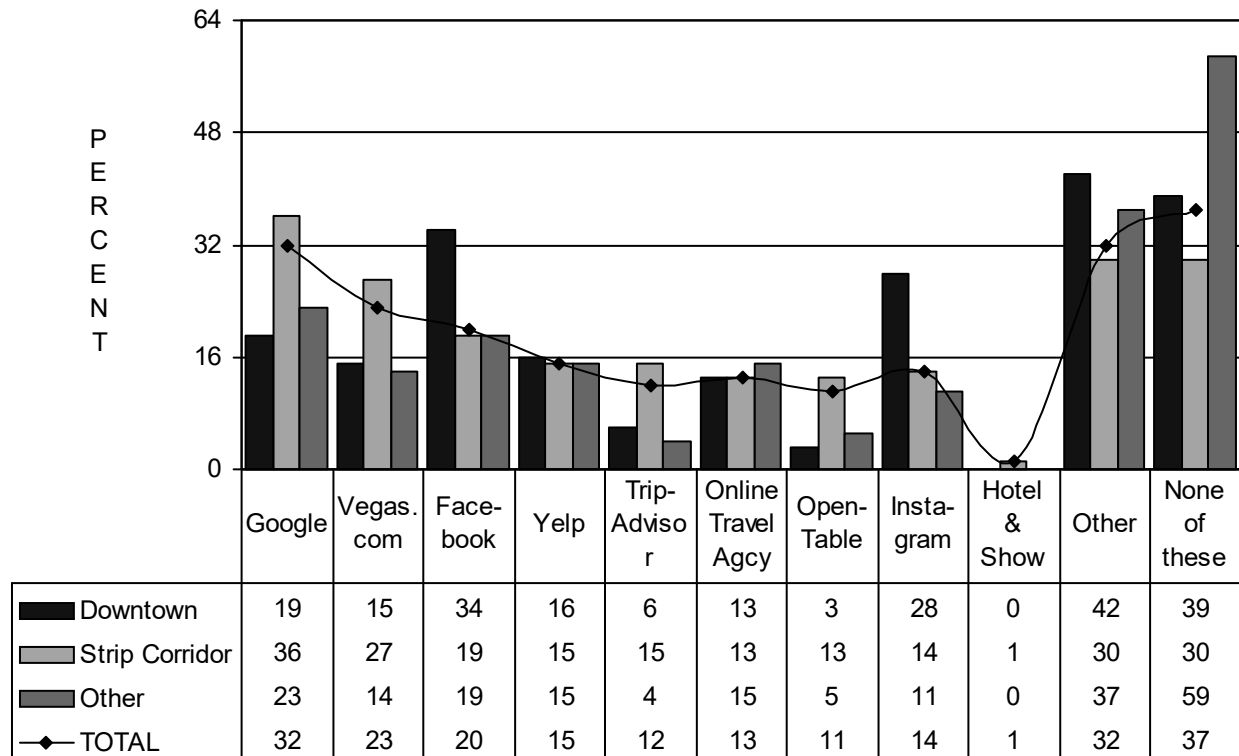
FIGURE 22
Website Or App Used To Book Flight
(Among Those Who Booked Their Flight To Las Vegas Online)



(Base Sizes: Downtown=39, Strip Corridor=1157, Other=192, TOTAL=1389)

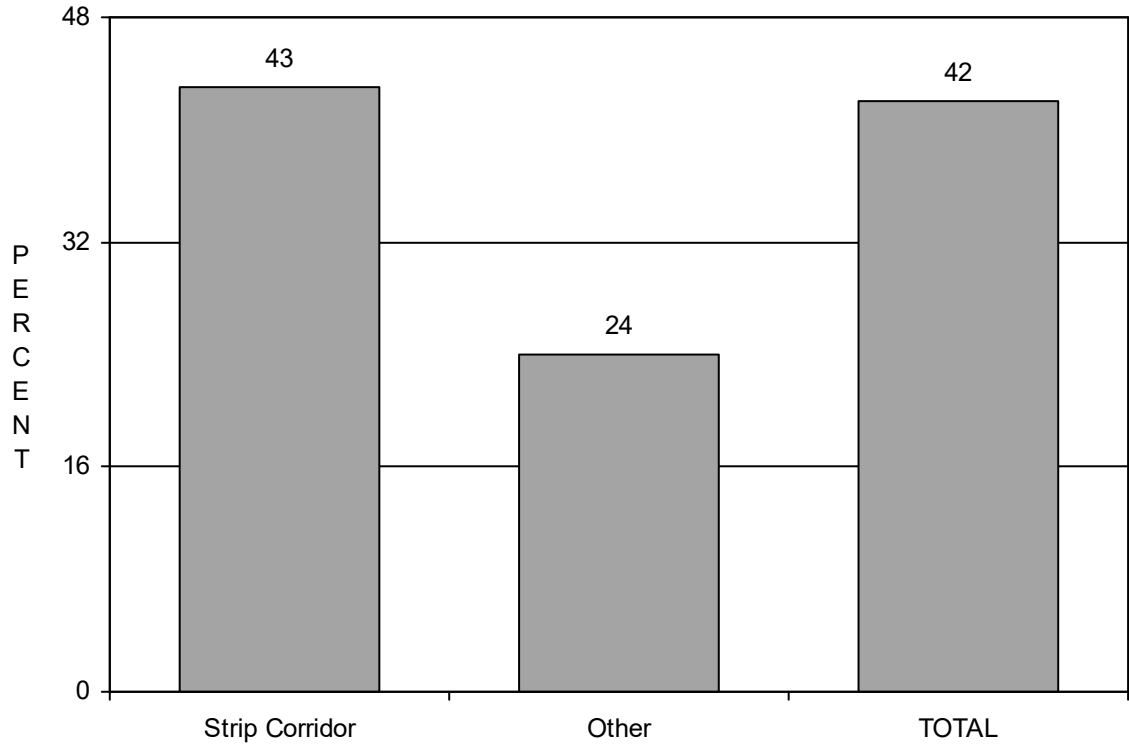
Respondents who had used a website or app to book their flight to Las Vegas were also asked what website they used. Nearly one-half (47%) of these visitors said they used an airline website, while 13% said they used Expedia. Strip Corridor lodgers (48%) were the most likely segment to say they used an airline website. Downtown lodgers were more likely than Strip Corridor lodgers to say they used Travelocity (13% vs. 8%) or Kayak.com (10% vs. 5%). Visitors lodging outside of Downtown or the Strip Corridor were more likely than Strip Corridor lodgers to say they used Priceline (8% vs. 4%).

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



Visitors were asked which, if any, social media and travel review apps or websites they used to plan their activities while in Las Vegas. One-third (32%) of visitors used Google, while about one in five said they used Vegas.com (23%), or Facebook (20%). Strip Corridor lodgers were the most likely segment to use a variety of apps and websites including Google (36%), Vegas.com (27%), TripAdvisor (15%), and/or OpenTable (13%). Downtown Lodgers were the most likely segment to use Facebook (34%) and/or Instagram (28%). Those visitors who lodged elsewhere than Downtown or the Strip Corridor (59%) were the most likely to say they did not use any websites or apps.

FIGURE 24
Whether Visited Downtown Las Vegas On This Trip

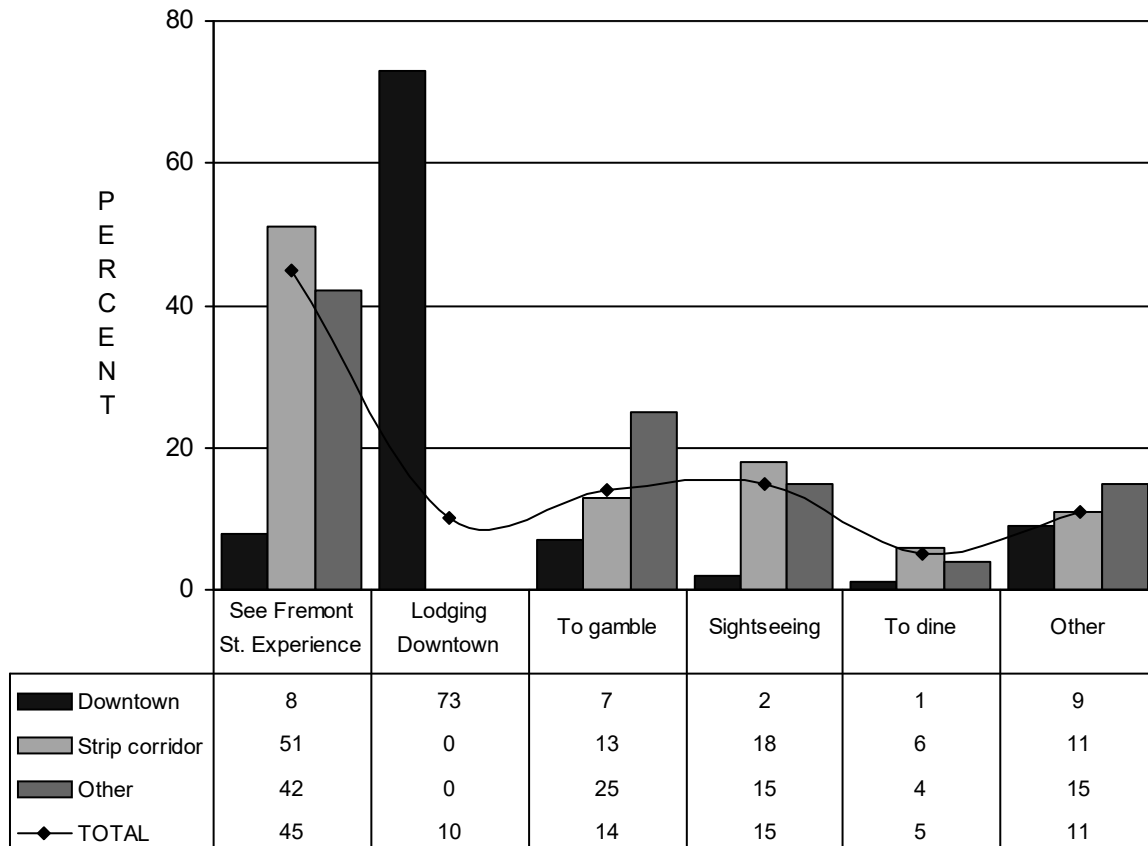


Only "yes" responses are reported in this figure.

Forty-two percent (42%) of all visitors said they visited Downtown Las Vegas on their current trip.** Strip Corridor lodgers (43%) were more likely than other non-Downtown lodgers (24%) to have visited Downtown.

** By definition, all (100%) respondents who said they lodged Downtown also visited the Downtown area on their current trip.

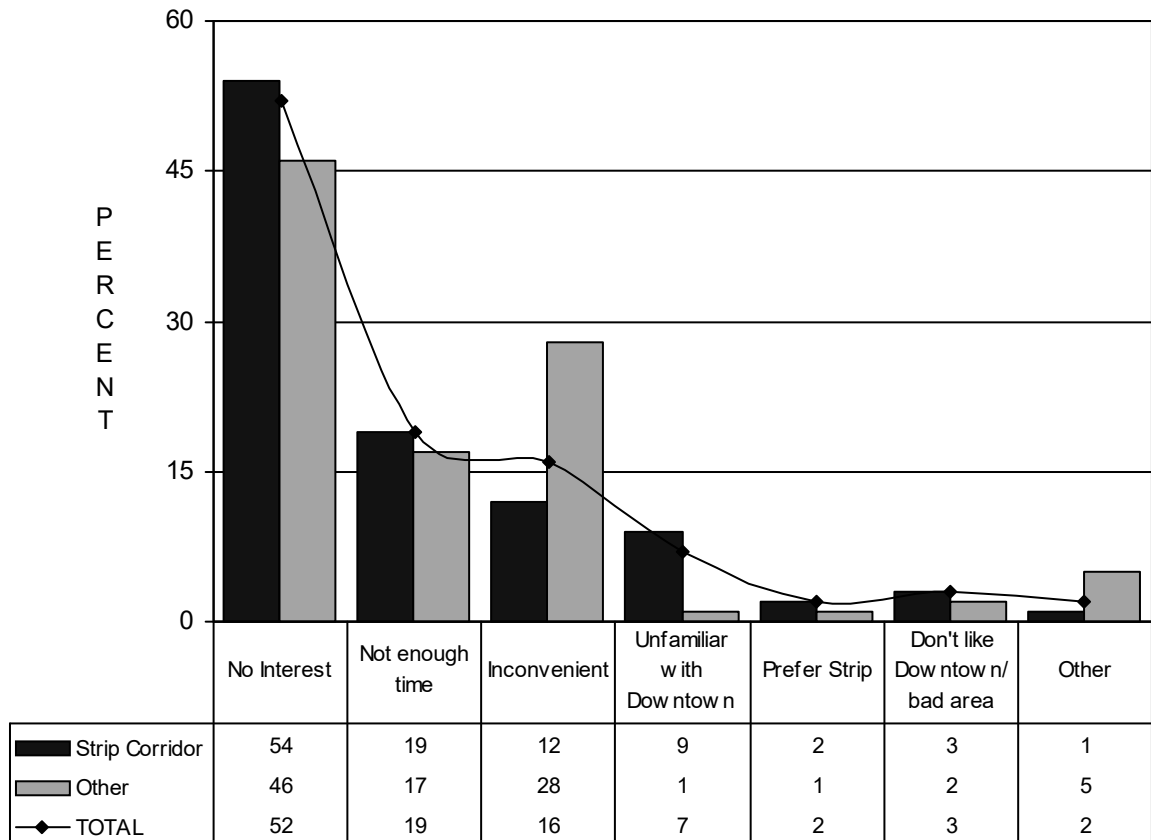
FIGURE 25
Main Reason For Visiting Downtown Las Vegas
(Among Those Who Visited Downtown)



(Base Sizes: Downtown=197, Strip Corridor=1126, Other=182, TOTAL=1506)

Visitors were asked for the primary reason why they had gone to the Downtown area. Most (73%) of those staying Downtown said they were there primarily because that was where they were lodging. Strip Corridor lodgers (51%) were the most likely segment to say they had gone Downtown primarily to see the Fremont Street Experience. Other lodgers (25%) were the most likely segment to say they went Downtown for gambling.

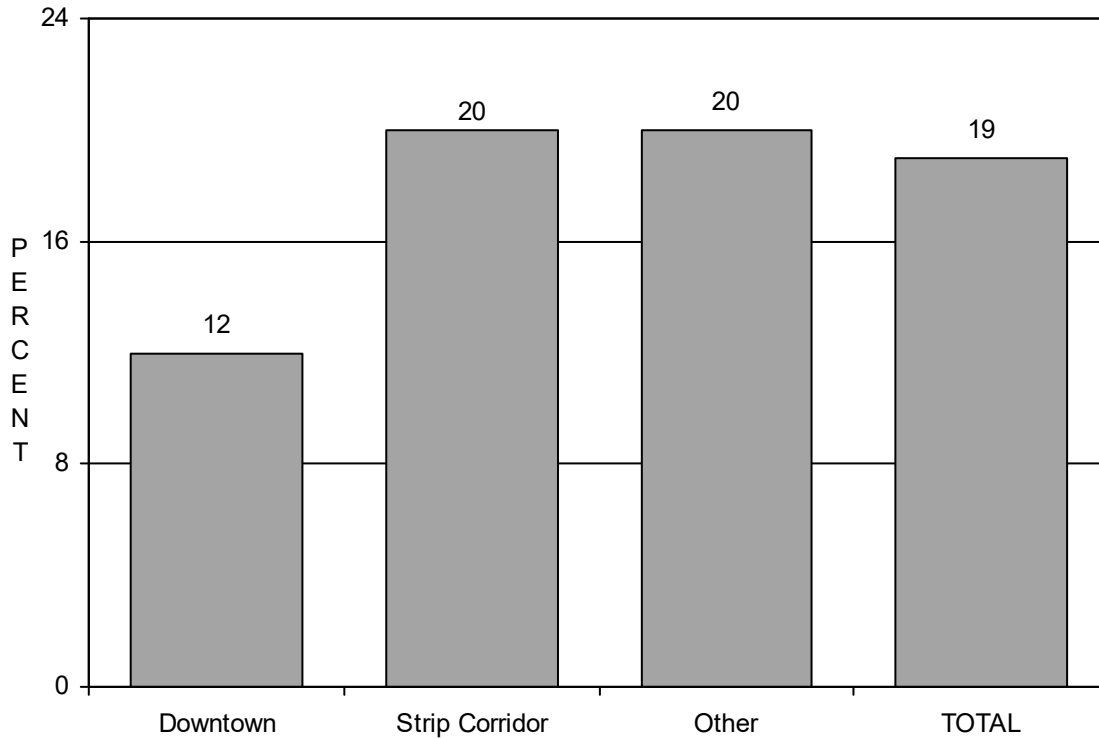
FIGURE 26
Main Reason For Not Visiting Downtown Las Vegas
(Among Those Who Did Not Visit Downtown)



(Base Sizes: Strip Corridor=1514, Other=578, TOTAL=2092)

Visitors who did not travel Downtown were asked why they did not. Two in ten (19%) said it was because they did not have enough time, but over one-half (52%) said it was because of a lack of interest in the Downtown area. Strip Corridor lodgers were more likely than Other lodgers to say they had no interest (54% vs. 46%) in going Downtown or they were unfamiliar with the Downtown area (9% vs. 1%), while Other lodgers were more likely than Strip Corridor lodgers to say that the Downtown area was inconvenient or out of the way (28% vs. 12%).

FIGURE 27
Visits To Nearby Places *

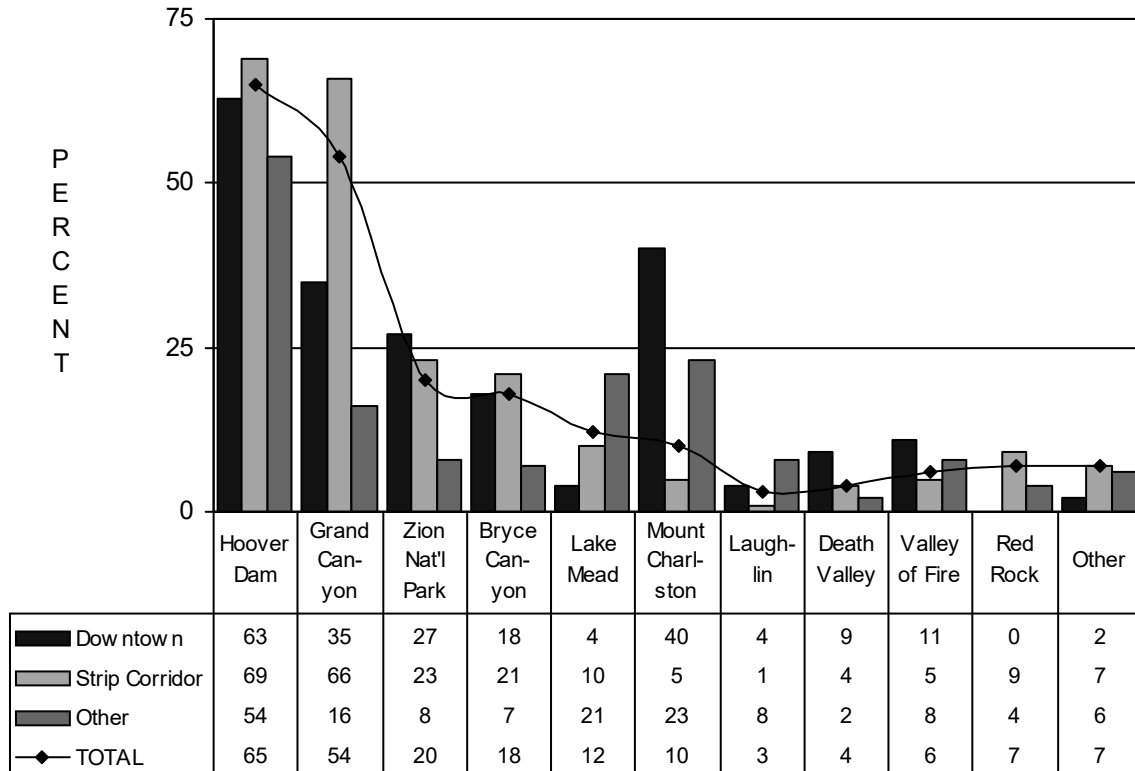


Only "yes" responses are reported in this figure.

One out of five (19%) visitors said they visited or planned to visit nearby places while on their trip to Las Vegas. Both Strip Corridor and Other lodgers (20% each) were more likely than Downtown lodgers (12%) to say they had or would visit nearby places during their current visit to Las Vegas.

* 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)



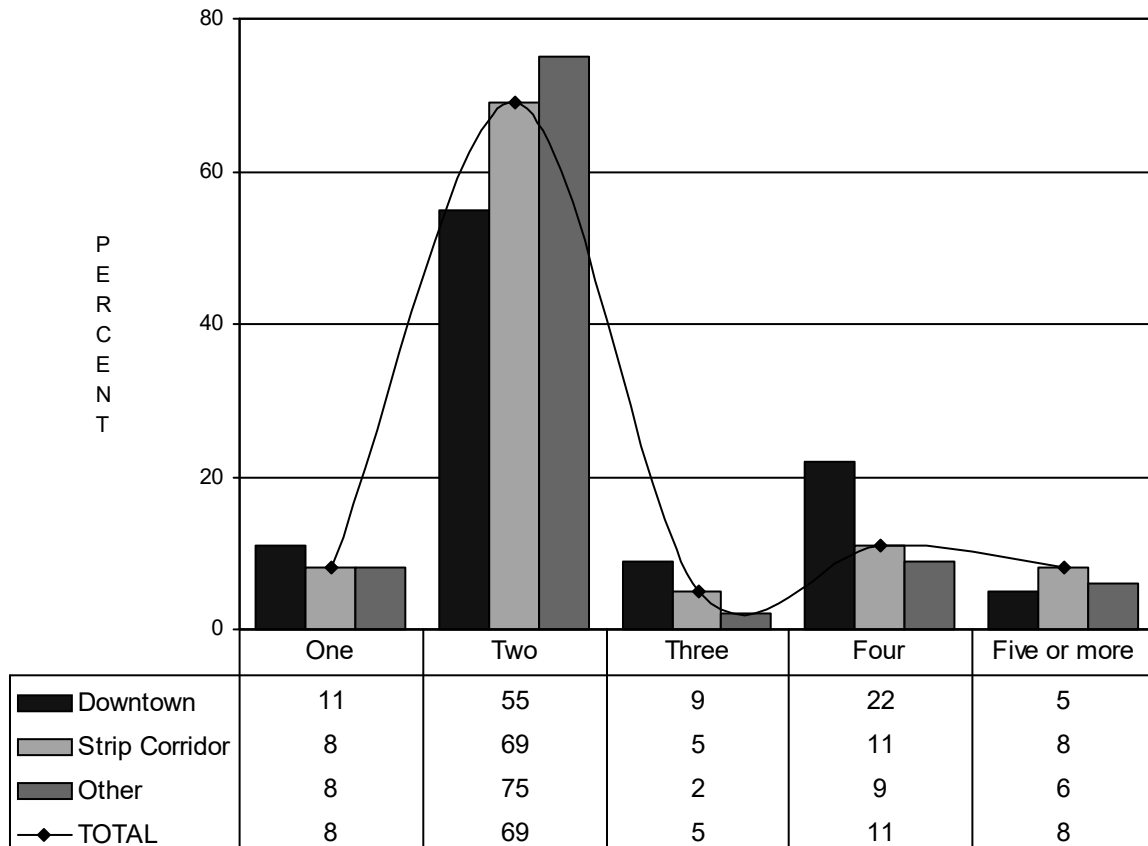
Multiple responses permitted.
(Base Sizes: Downtown=22*, Strip Corridor=512, Other=160, TOTAL=694)

Among visitors who visited other places outside Las Vegas, Strip Corridor lodgers were more likely than Other lodgers to say they visited the Hoover Dam (69% vs. 54%) and Bryce Canyon (21% vs. 7%). Strip Corridor lodgers (66%) were also more likely than Downtown (35%) and Other lodgers (16%) to say they visited the Grand Canyon. Both Downtown (27%) and Strip Corridor lodgers (23%) were more likely than Other lodgers (8%) to say they visited Zion National Park. Downtown (40%) and Other lodgers (23%) were more likely than Strip Corridor lodgers (5%) to say they visited Mount Charleston. Other non-Downtown lodgers (8%) were more likely than Strip Corridor lodgers (1%) to say they visited Laughlin.

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

TRIP CHARACTERISTICS AND EXPENDITURES

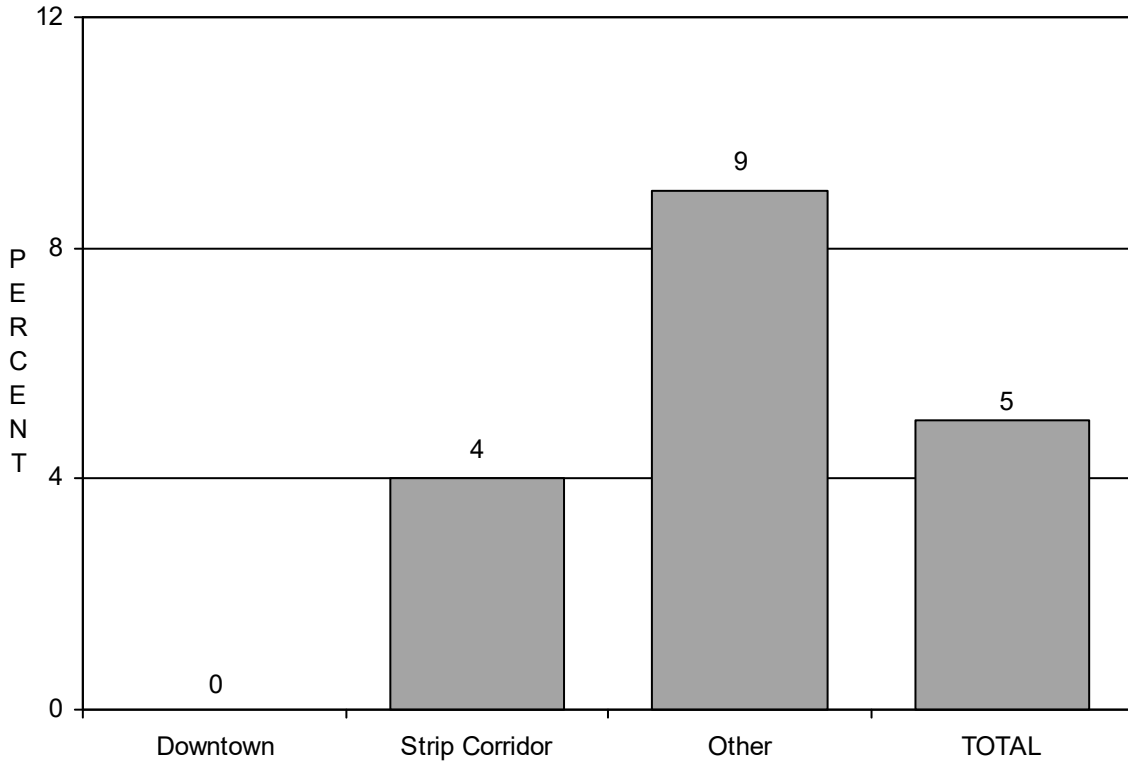
FIGURE 29
Adults In Immediate Party



(Means: Downtown=2.6, Strip Corridor=2.6, Other=2.3, TOTAL=2.5)

The majority of visitors (69%) traveled to Las Vegas in parties of two adults. Visitors who did not lodge Downtown or in the Strip Corridor (75%) were the most likely segment to be traveling with two adults in their party. Downtown lodgers (22%) were the most likely segment to be traveling with four adults in their party. The *average* party size was higher for Strip Corridor lodgers (average of 2.6 adults) than for those visitors who lodged elsewhere (2.3).

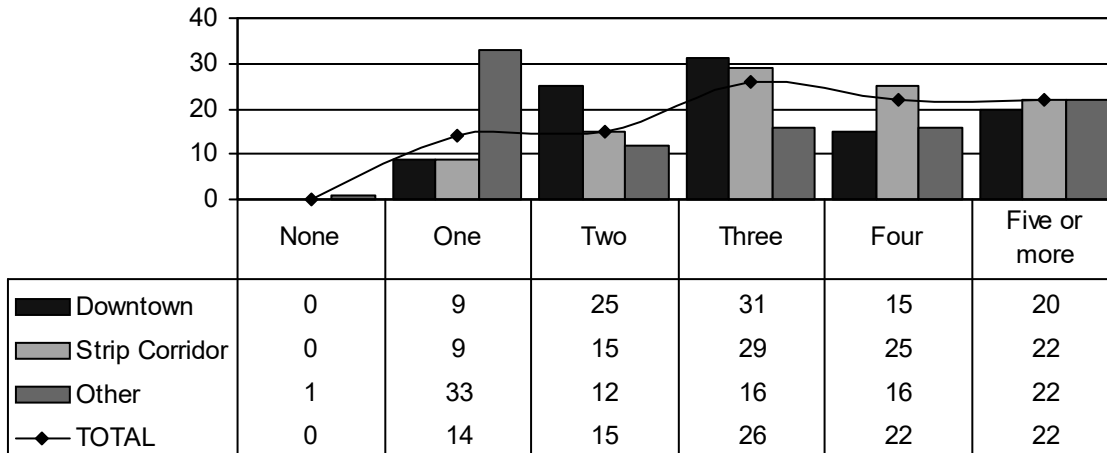
FIGURE 30
Whether Has Persons In Party Under Age 21
(Among All Visitors)



Only "yes" responses are reported in this figure.

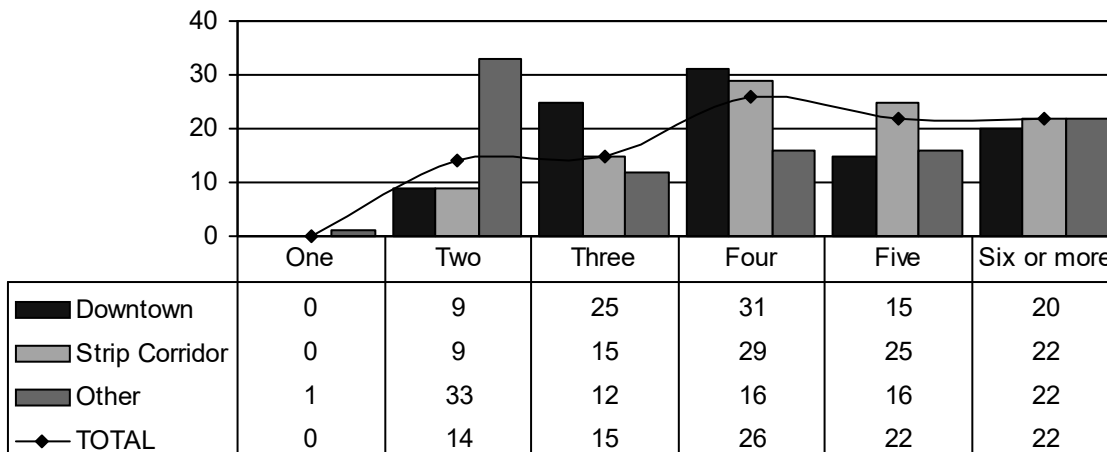
Five percent (5%) of visitors said they were traveling with people under the age of 21 in their immediate party. Other lodging visitors (9%) were the most likely segment to be traveling with people under the age of 21 in their immediate party.

FIGURE 31
Nights Stayed



(Means: Downtown=3.2, Strip Corridor=3.5, Other=3.0, TOTAL=3.4)

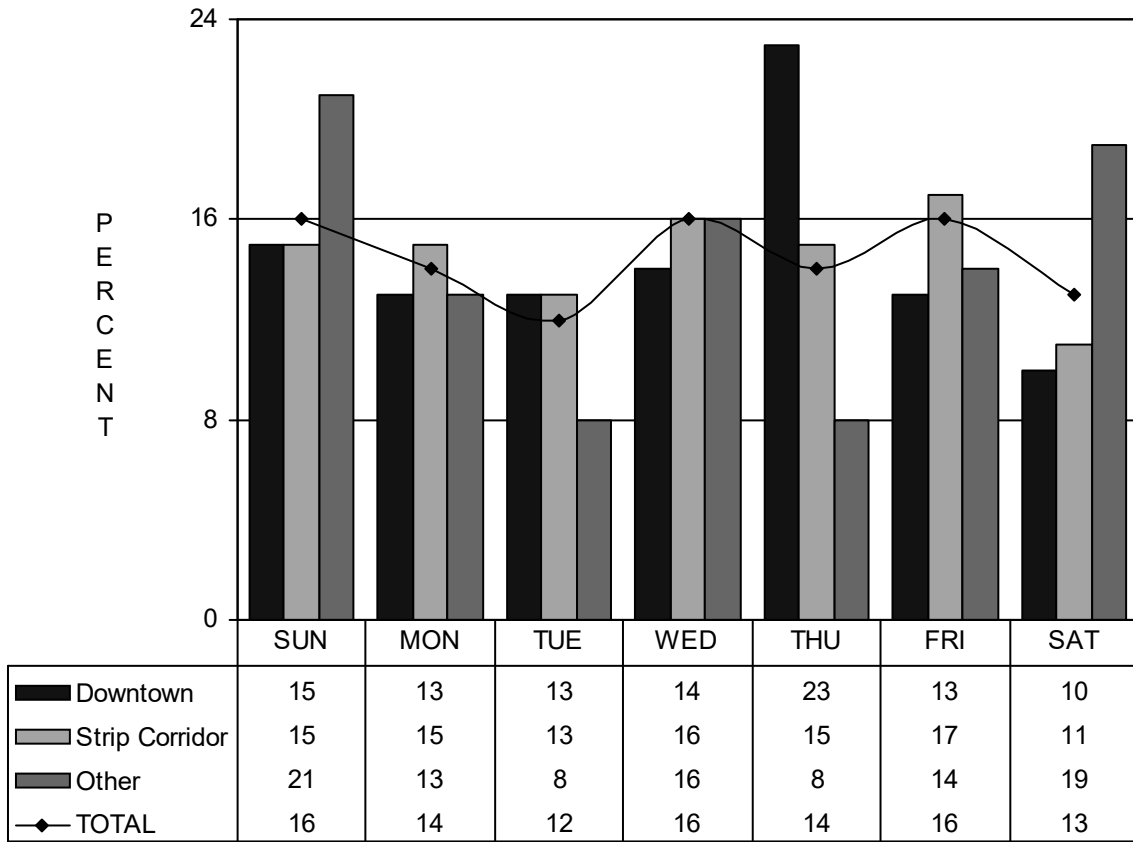
FIGURE 32
Days Stayed



(Means: Downtown=4.2, Strip Corridor=4.5 Other=4.0, TOTAL=4.4)

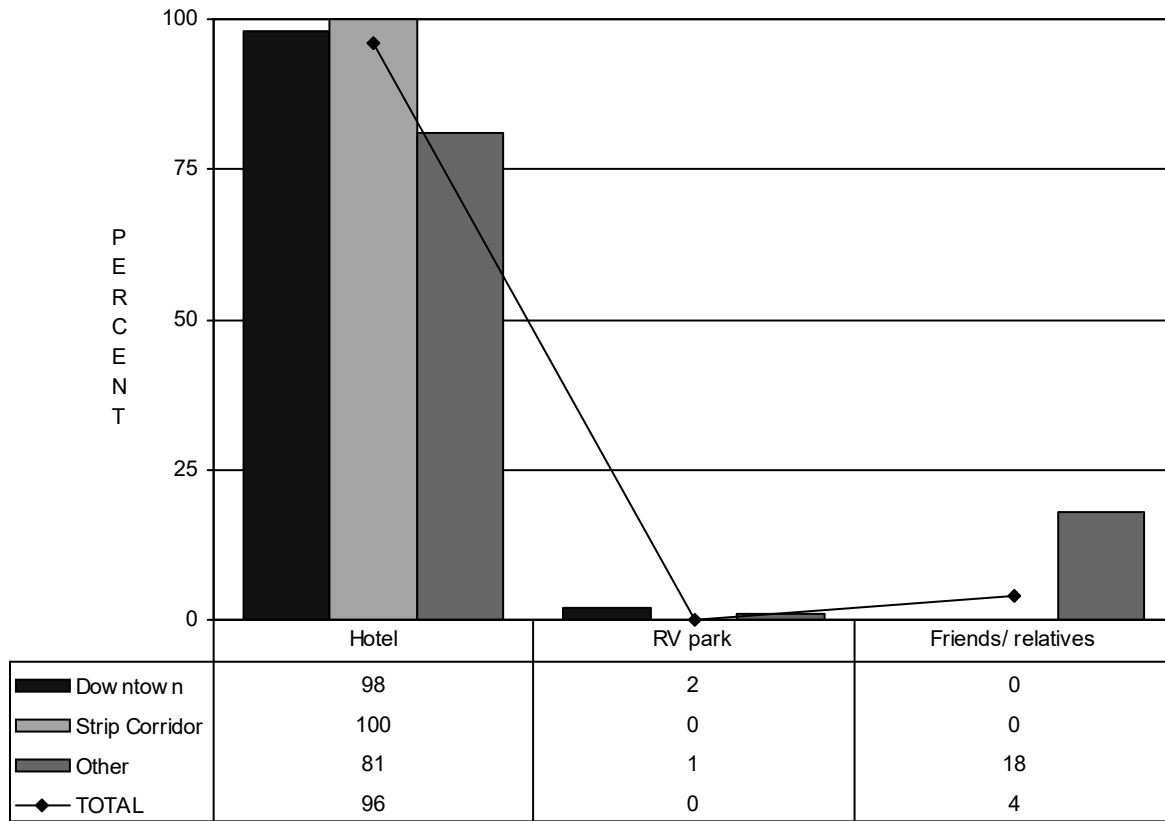
Visitors stayed an average of 3.4 nights and 4.4 days in Las Vegas. Strip Corridor lodgers (3.5 nights and 4.5 days) stayed longer than both Other lodging visitors (3.0 nights and 4.0 days) and Downtown lodgers (3.2 nights and 4.2 days). Other visitors were the most likely segment to say they stayed one night in Las Vegas (33%) while Strip Corridor lodgers (25%) were the most likely segment to say they stayed four nights in Las Vegas.

FIGURE 33
Day Of Arrival



Visitors were asked on what day of the week they arrived in Las Vegas. Downtown lodgers (23%) were the most likely segment to arrive on a Thursday while Other lodging visitors (19%) were the most likely segment to arrive on a Saturday.

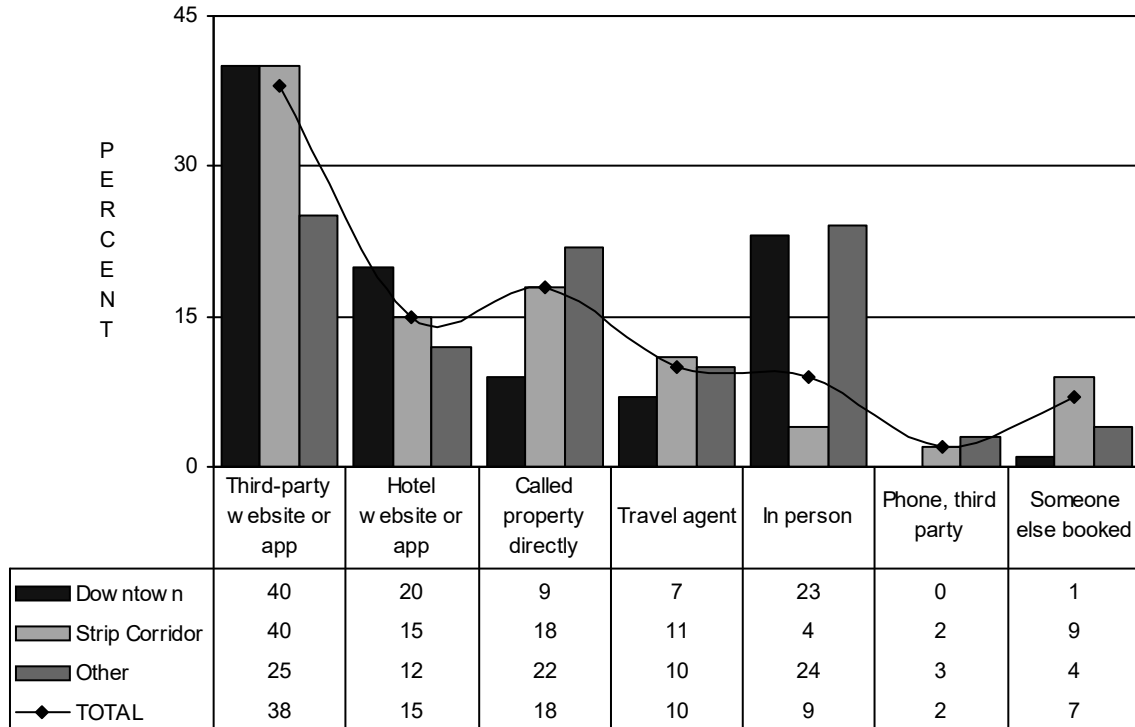
FIGURE 34
Type Of Lodging
(Among Those Who Stayed Overnight)



(Base Sizes: Downtown=197, Strip Corridor=2641, Other=750, TOTAL=3588)

Downtown (98%) and Strip Corridor lodgers (100%) were more likely than Other visitors (81%) to have stayed in a hotel, while nearly one in five Other lodgers (18%) said they stayed with friends or relatives.

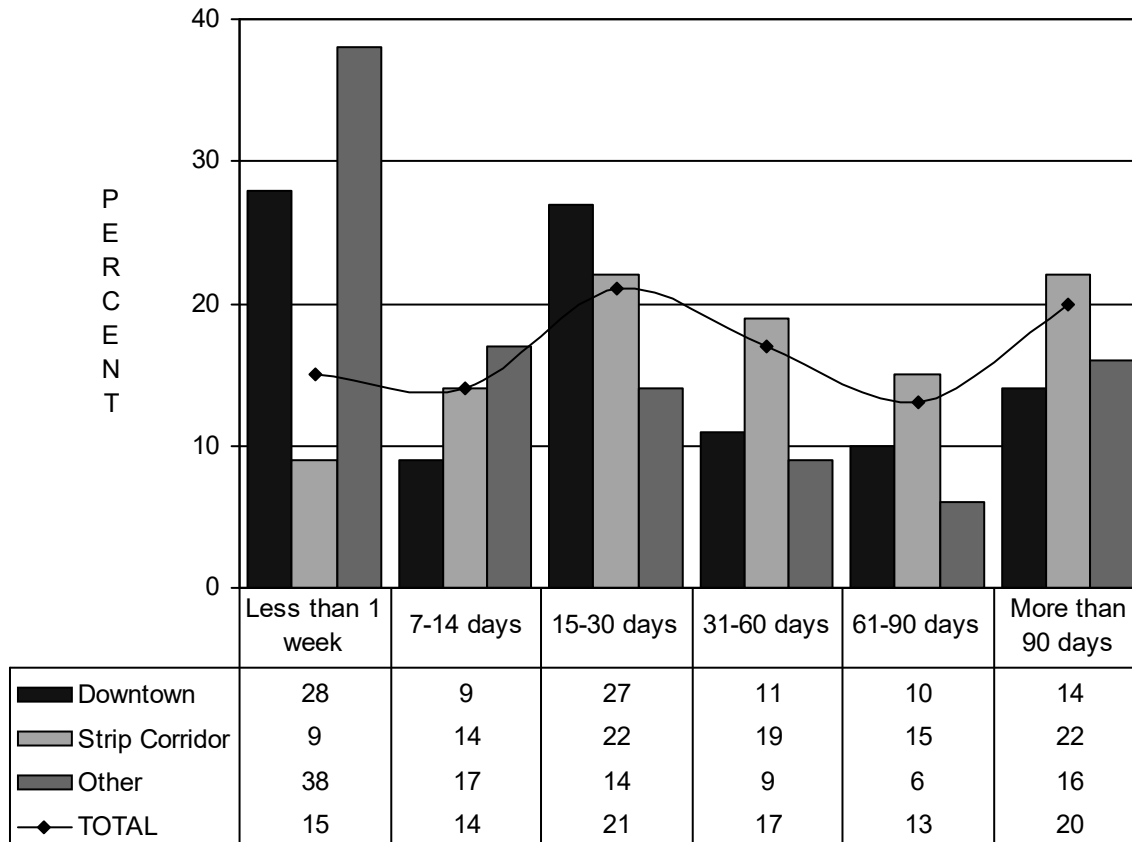
FIGURE 35
How Booked Accommodations In Las Vegas
(Among Those Who Stayed In A Hotel/RV Park)



(Base Sizes: Downtown=197, Strip Corridor=2604, Other=607, 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. Strip Corridor lodging visitors were the most likely segment to say their accommodations were booked by someone else (9%) and the least likely segment to say they were booked in-person (4%). Downtown lodging visitors were the least likely segment to say their accommodations were booked by calling the property directly (9%) or by phone through a third party (less than 1%).

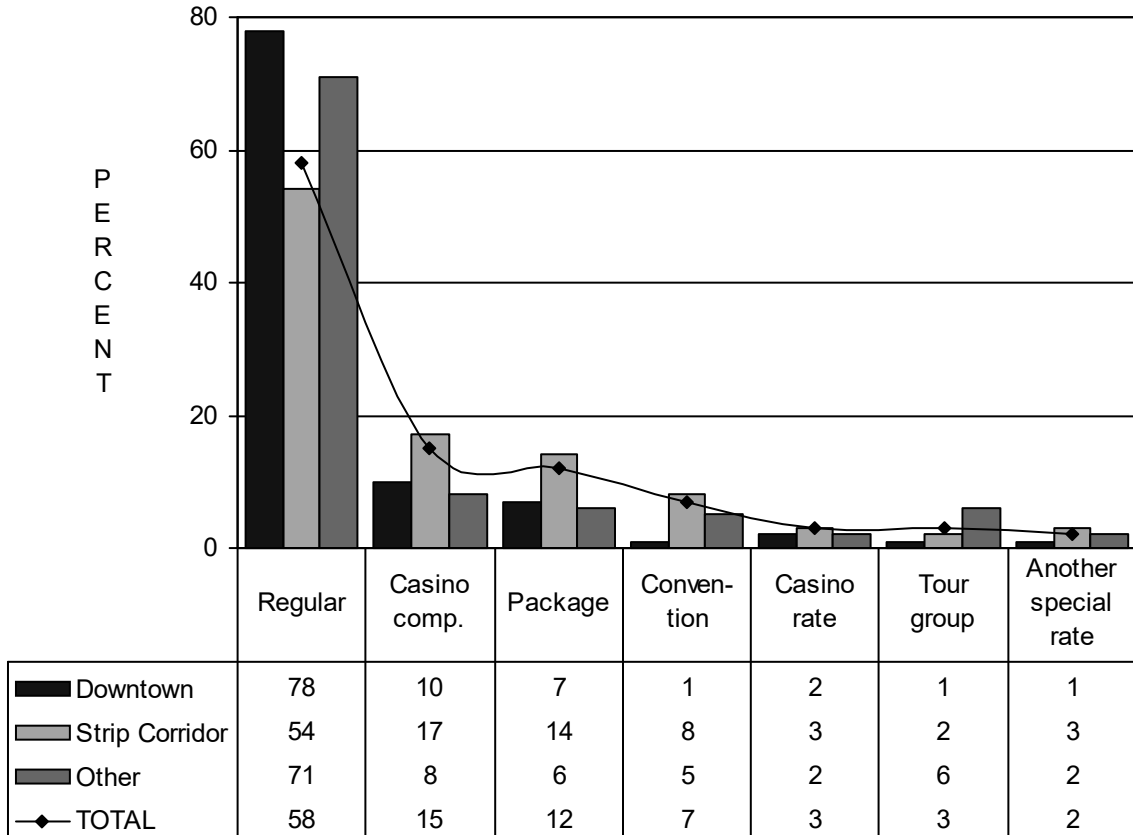
FIGURE 36
Advance Booking Of Accommodations
(Among Those Who Stayed In A Hotel/RV Park)



(Base Sizes: Downtown=197, Strip Corridor=2604, Other=607, TOTAL=3409)

Among those visitors staying in a hotel or RV park, one-half (50%) booked their accommodations more than one month in advance. Other lodging visitors were the most likely segment to have booked their accommodations less than a week in advance (38%) or between seven to fourteen days in advance (17%). Strip Corridor lodgers (56%) were the most likely segment to have booked their accommodations more than one month in advance. They were also the most likely segment to book thirty-one to sixty days (19%) or more than ninety days (22%) in advance.

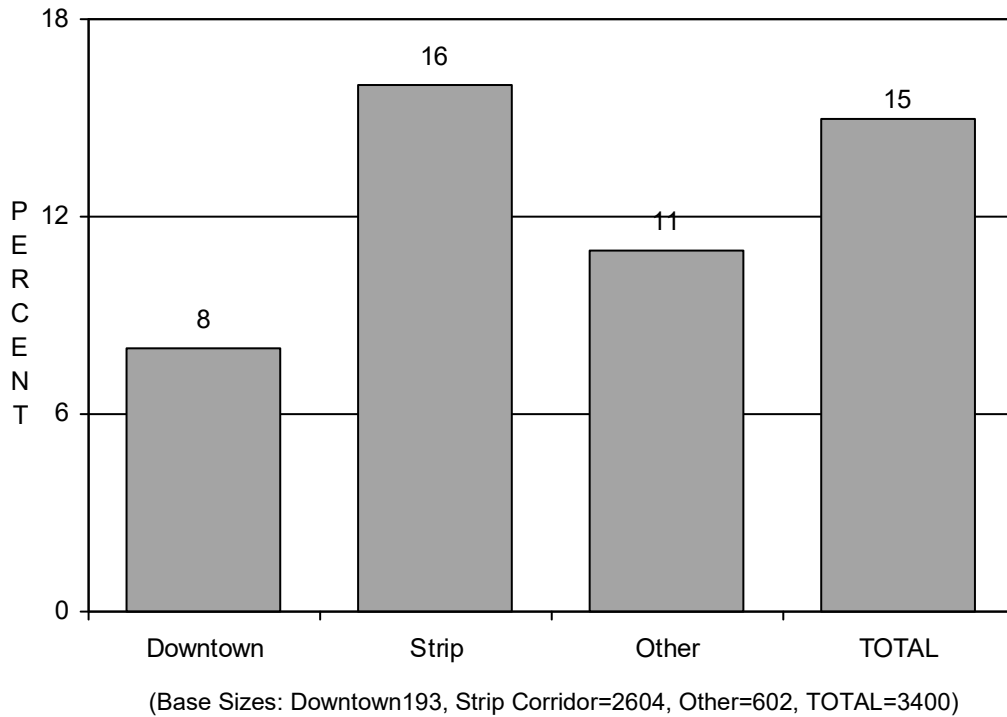
FIGURE 37
Type Of Room Rates
(Among Those Staying In A Hotel)



(Base Sizes: Downtown=193, Strip Corridor=2604, Other=602, TOTAL=3400)

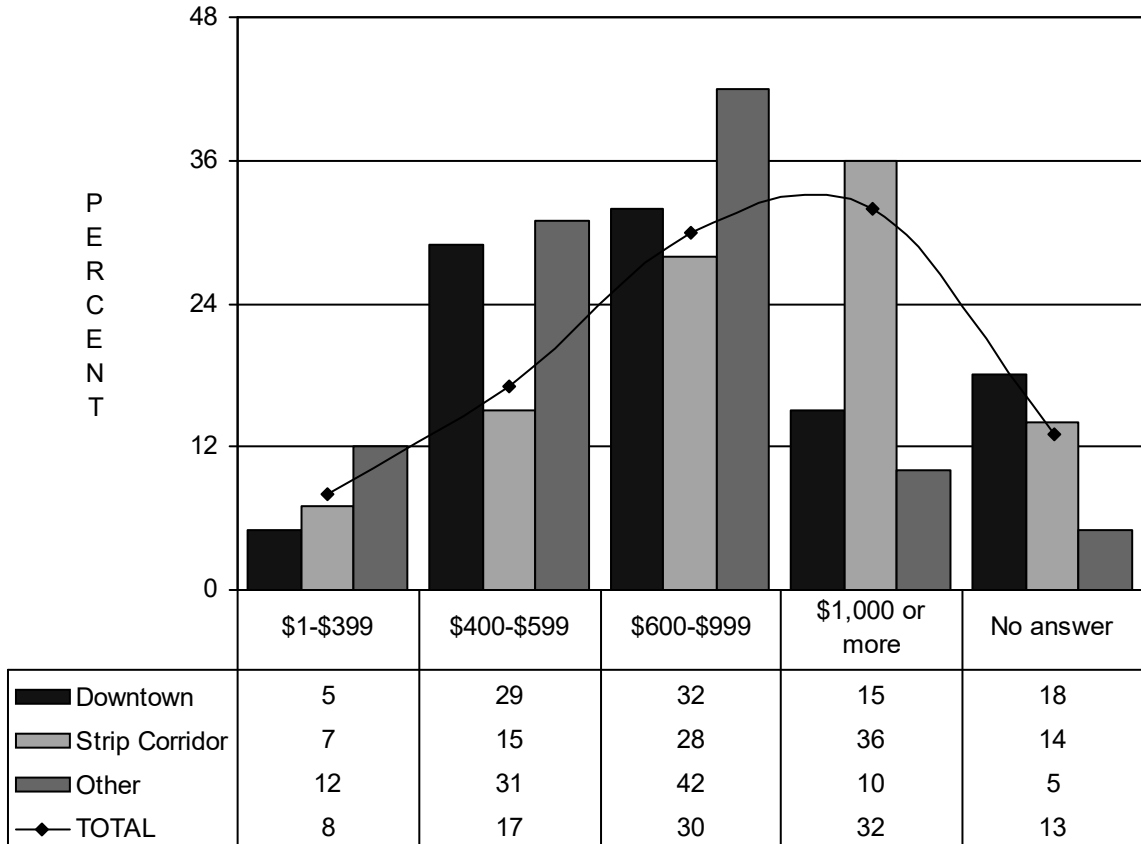
Looking at the type of room rates received by hotel lodgers, Strip Corridor lodgers were the most likely segment to have paid a convention rate (8%) or to have received a casino complimentary rate (17%). They were also the least likely segment to have paid a regular room rate (54%). Other lodging visitors (6%) were the most likely segment to pay a tour group rate.

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



Fifteen percent (15%) of all Las Vegas visitors staying in a hotel were visiting as part of a tour group or package deal. Strip Corridor lodgers (16%) were the most likely segment to be visiting Las Vegas as part of a tour group or package deal.

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

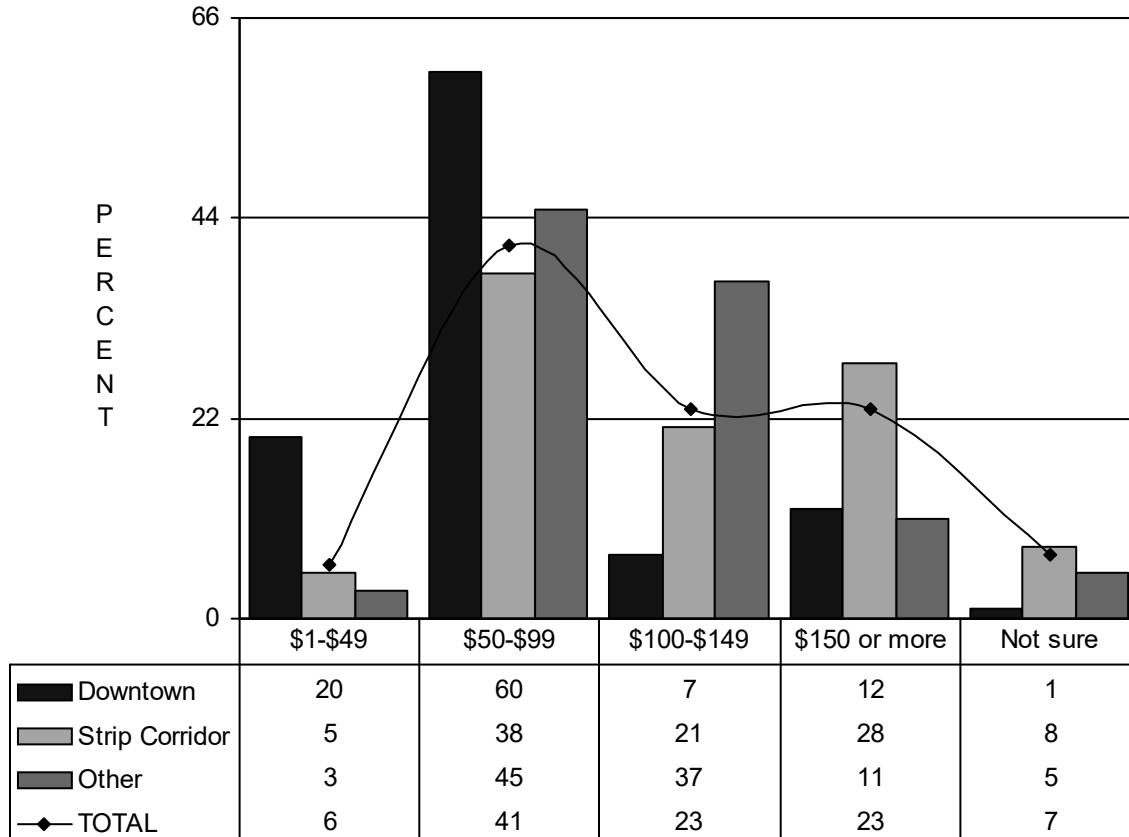


(Base Sizes: Downtown=16*, Strip Corridor=421, Other=67, TOTAL=504)
(Mean: Downtown=\$788.85, Strip Corridor=\$1,048.71, Other=\$658.76, TOTAL=\$983.73)

We asked those visitors who purchased either a hotel or a tour/travel group package how much their package cost per person. On average, Strip Corridor lodgers (average package cost of \$1,048.71) paid the most for their package. Additionally, Strip Corridor lodgers (36%) were the most likely segment to have paid \$1,000 or more per person for their package.

* Note the very small base size for Downtown lodgers.

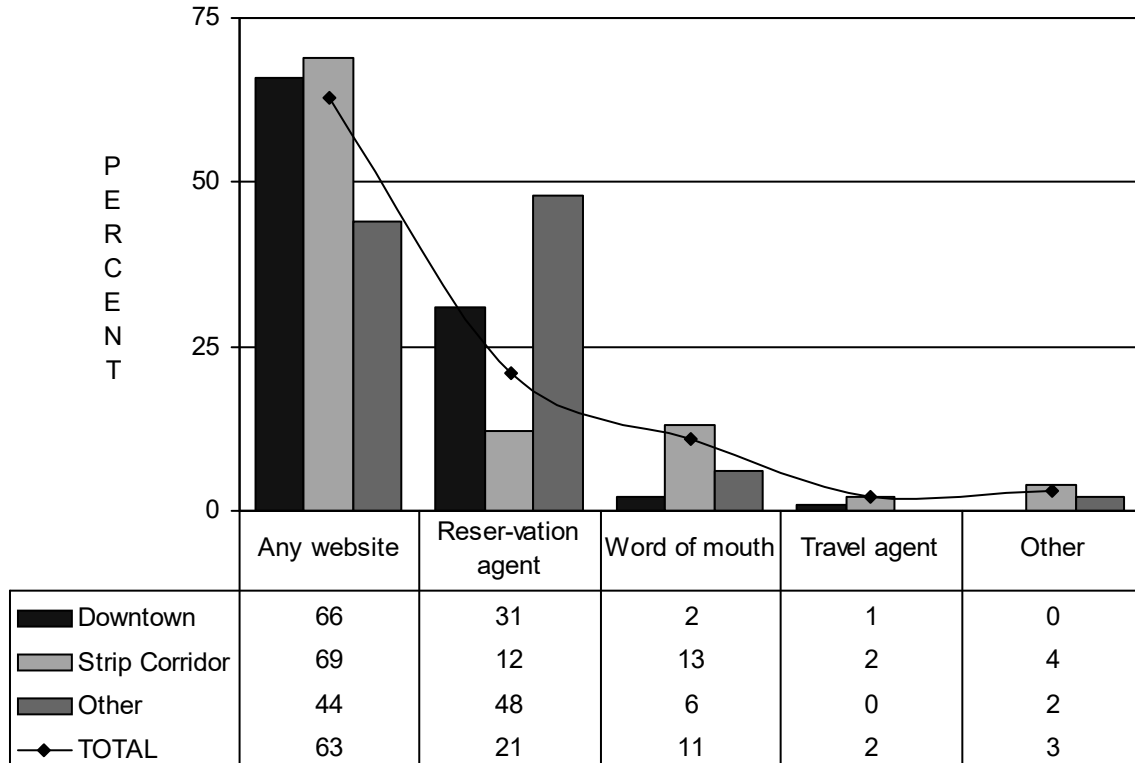
FIGURE 40
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel/Non-Package And Non-Comp)



(Base Sizes: Downtown=158, Strip Corridor=1752, Other=484, TOTAL=2394)
(Means: Downtown=\$84.49, Strip Corridor=\$119.96, Other=\$104.97, 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. On average, Strip Corridor lodgers (mean of \$119.96) paid more for their room than Other lodgers (\$104.97), while Downtown lodgers (\$84.49) paid the least. Additionally, Strip Corridor lodgers (28%) were the most likely segment to pay \$150 or more per day for their room, while Downtown lodgers (20%) were the most likely segment to pay less than \$50 per day for their room.

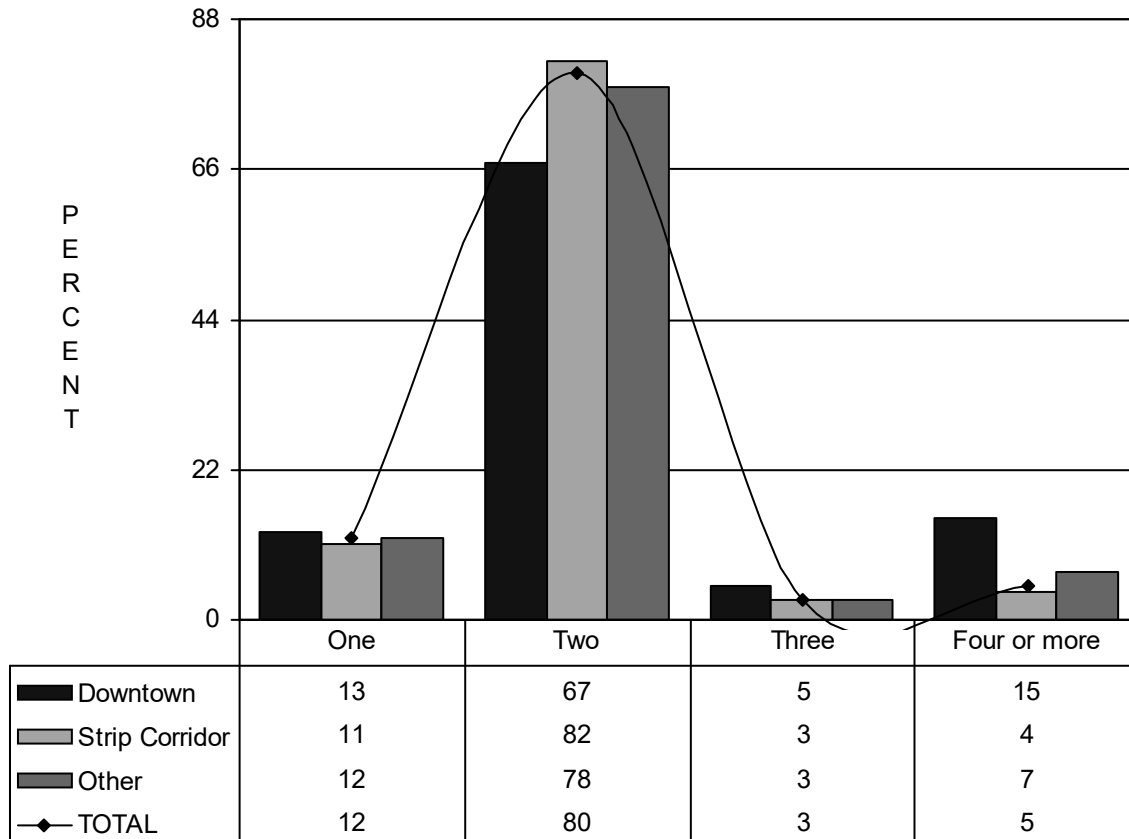
FIGURE 41
How First Found Out About Room Rate
(Among Those Staying In A Hotel/Non-Package And Non-Comp)



(Base Sizes: Downtown=158, Strip Corridor=1752, Other=484, TOTAL=2394)

Visitors were asked how they first found out about the room rate they paid. Strip Corridor lodgers were the most likely segment to say they first found out about their room rate through word of mouth (13%) and the least likely segment to say they first heard about their rate from a reservation agent (12%). Other lodging visitors were the most likely segment to say they first found out about their room rate through a reservation agent (48%) and the least likely segment to say they first found out about their room rate from a website (44%).

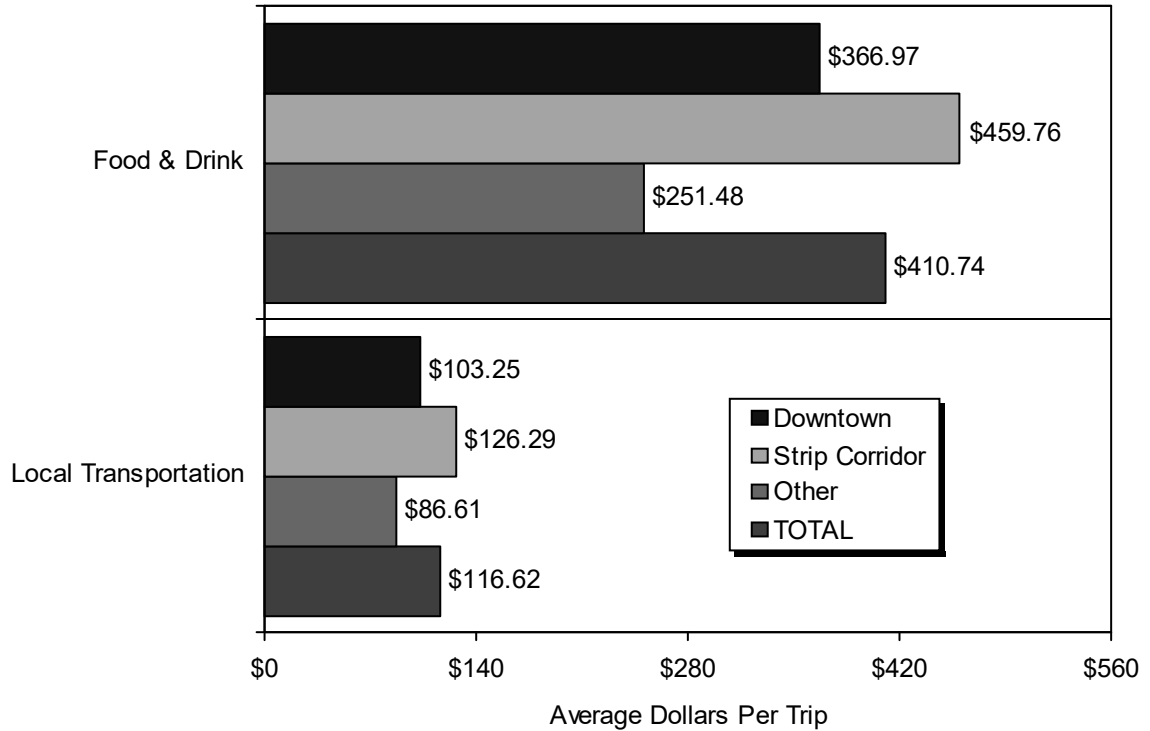
FIGURE 42
Number Of Room Occupants
(Among Those Staying In A Hotel)



(Base Sizes: Downtown=193, Strip Corridor=2641, Other=605, TOTAL=3440)
(Means: Downtown=2.2, Strip Corridor=2.0, Other=2.1, TOTAL=2.0)

The majority (80%) of visitors who stayed in a hotel room said two people stayed in their room, with an overall average of 2.0 room occupants. Downtown lodgers on average (average of 2.2 people) had more people in their room than either Strip Corridor lodgers (average of 2.0 people) or Other area lodgers (average of 2.1 people). Downtown lodgers (15%) were the most likely segment to say they had four or more room occupants.

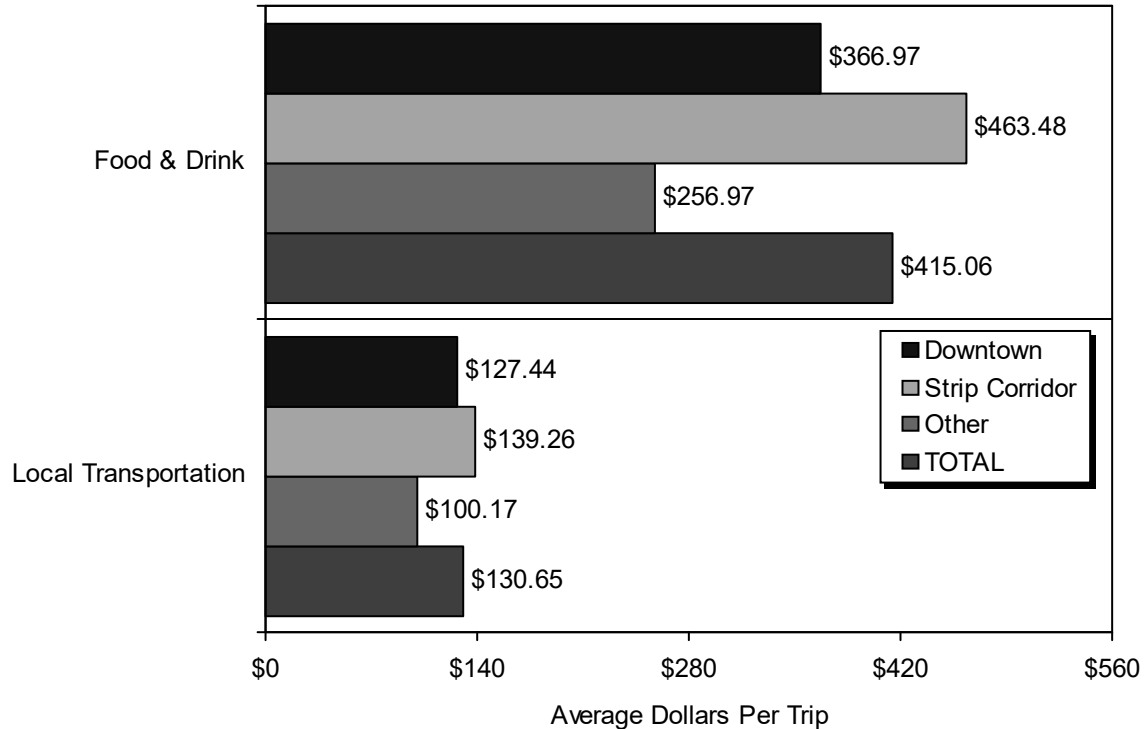
FIGURE 43
 Average Trip Expenditures On Food & Drink —
 And On Local Transportation
 (Including Visitors Who Spent Nothing In That Category)



On average, Strip Corridor lodgers (\$459.76) spent more on food and drink than Downtown lodgers (\$366.97), while Other area lodgers (\$251.48) spent the least.

On average, Strip Corridor lodgers (\$126.29) spent more on local transportation than Other area (\$86.61) lodgers.

FIGURE 44
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Among Those Who Spent Money In That Category)

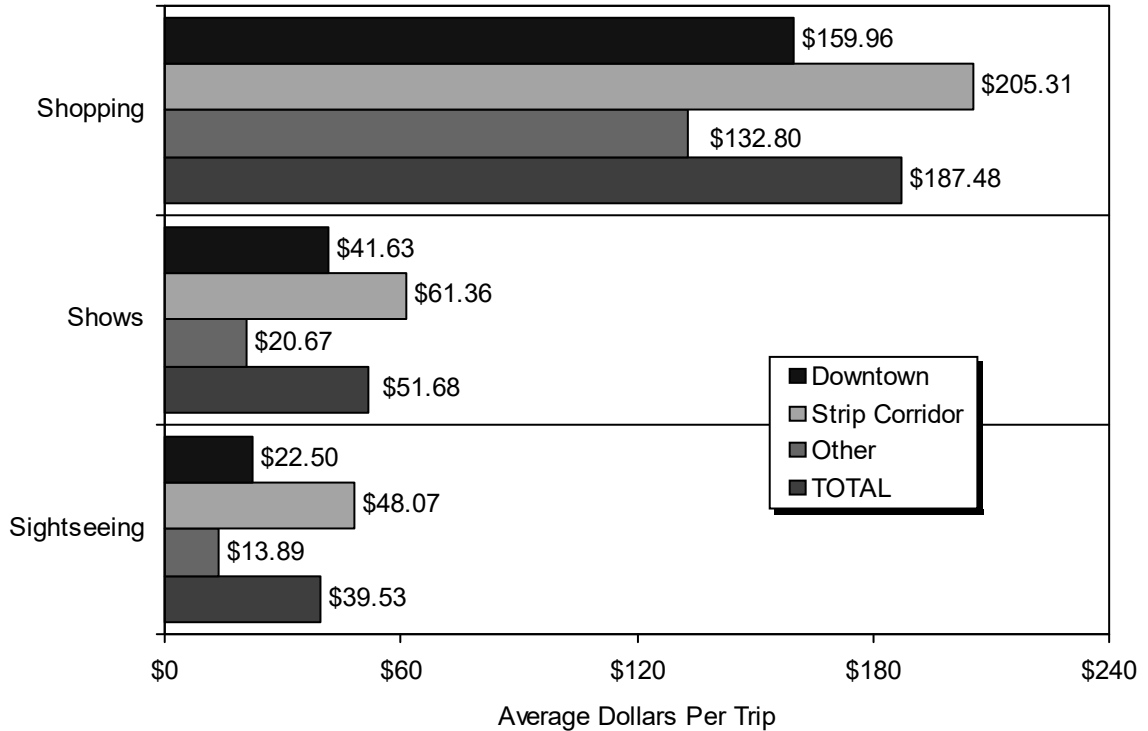


(Base Sizes, Food & Drink: Downtown=197, Strip Corridor=2620, Other=744, TOTAL=3562)
(Base Sizes, Local Transportation: Downtown=160, Strip Corridor=2397, Other=657, TOTAL=3214)

On average, among those visitors who actually spent money on food and drink, Strip Corridor lodgers (\$463.48) spent more than Downtown lodgers (\$366.97), while Other area lodgers (\$256.97) spent the least.

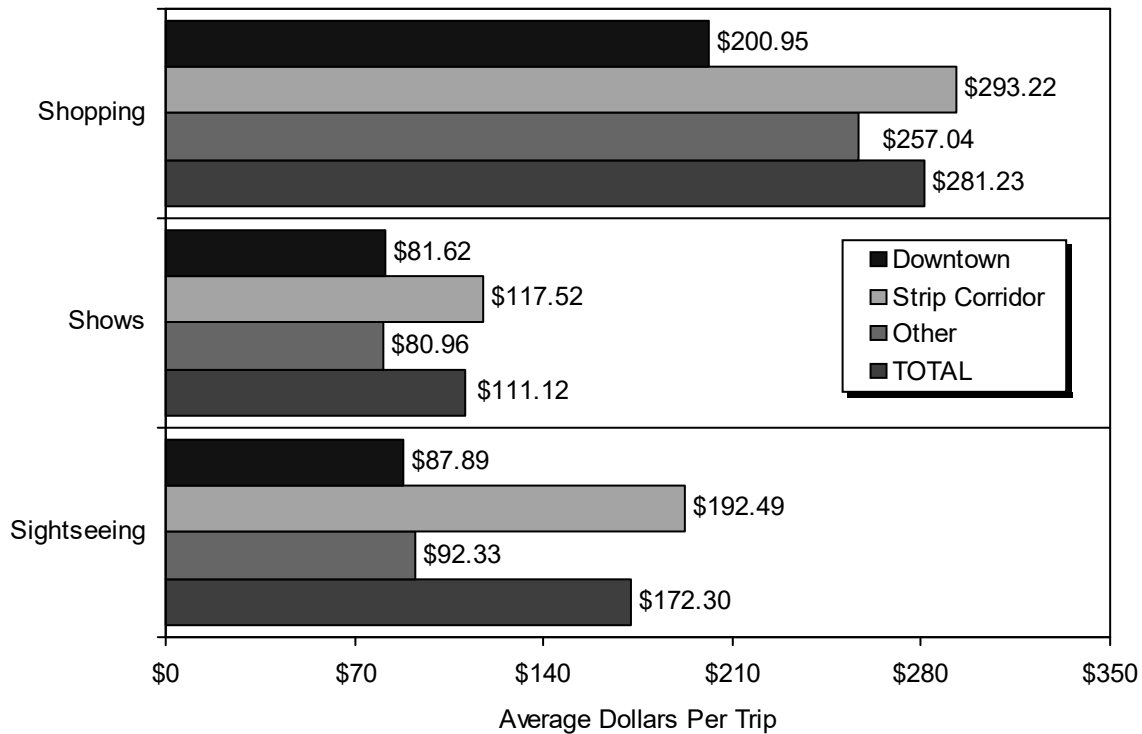
On average, among those visitors who spent money on local transportation, Strip Corridor lodgers (\$139.26) spent more than Other area lodgers (\$100.17).

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



On average, Strip Corridor lodgers (\$205.31) spent more on shopping than Other area lodgers (\$132.80). On average, Strip Corridor lodgers (\$61.36) also spent more on shows than Downtown lodgers (\$41.63), while Other lodgers (\$20.67) spent the least. On average, Strip Corridor lodgers (\$48.07) spent more on sightseeing than both Downtown (\$22.50) and Other area lodgers (\$13.89).

FIGURE 46
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Among Those Who Spent Money In That Category)

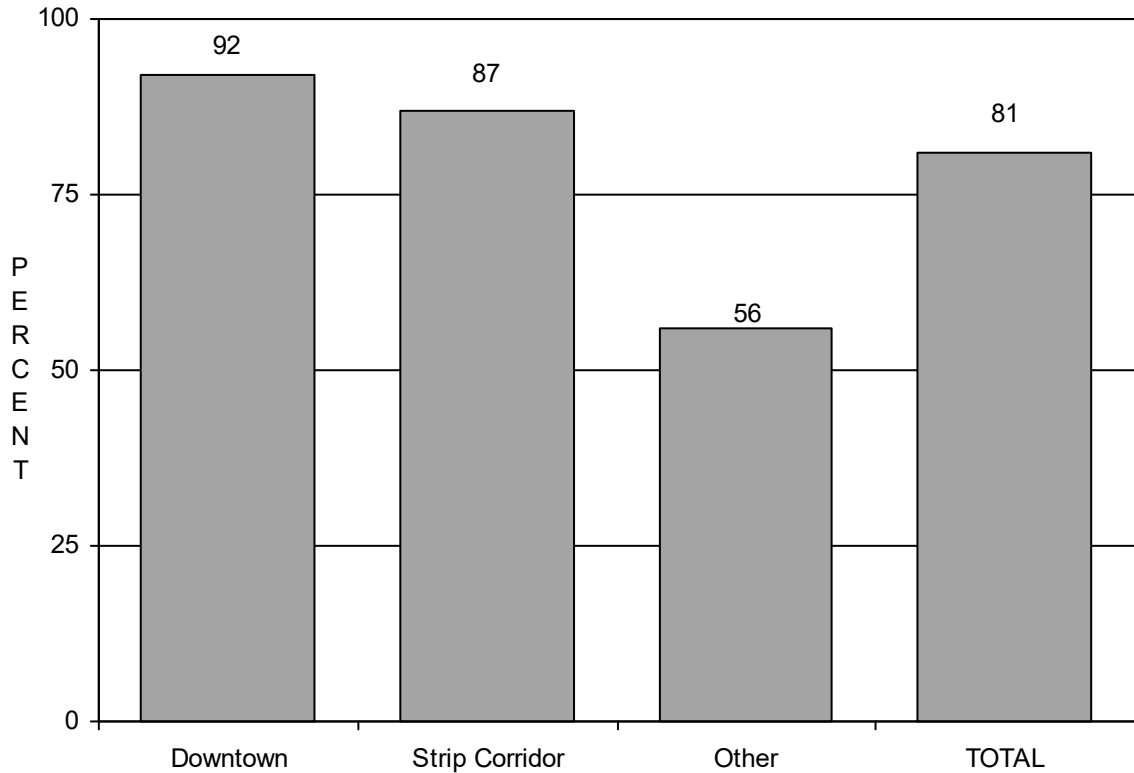


(Base Sizes, Shopping: Downtown=157, Strip Corridor=1852, Other=393, TOTAL=2402)
 (Base Sizes, Shows: Downtown=101, Strip Corridor=1381, Other=194, TOTAL=1676)
 (Base Sizes, Sightseeing: Downtown=52, Strip Corridor=703, Other=139, TOTAL=894)

Among visitors who spent money in these categories, on average, Strip Corridor lodgers (\$293.22) spent more on shopping than Downtown lodgers (\$200.95). On average, Strip Corridor lodgers also spent more on shows (\$117.52) than both Downtown lodgers (\$81.62) and Other area lodgers (\$80.96). On average, Strip Corridor lodgers (\$192.49) spent more on sightseeing than both Downtown (\$87.89) and Other area lodgers (\$92.33).

GAMING BEHAVIOR AND BUDGETS

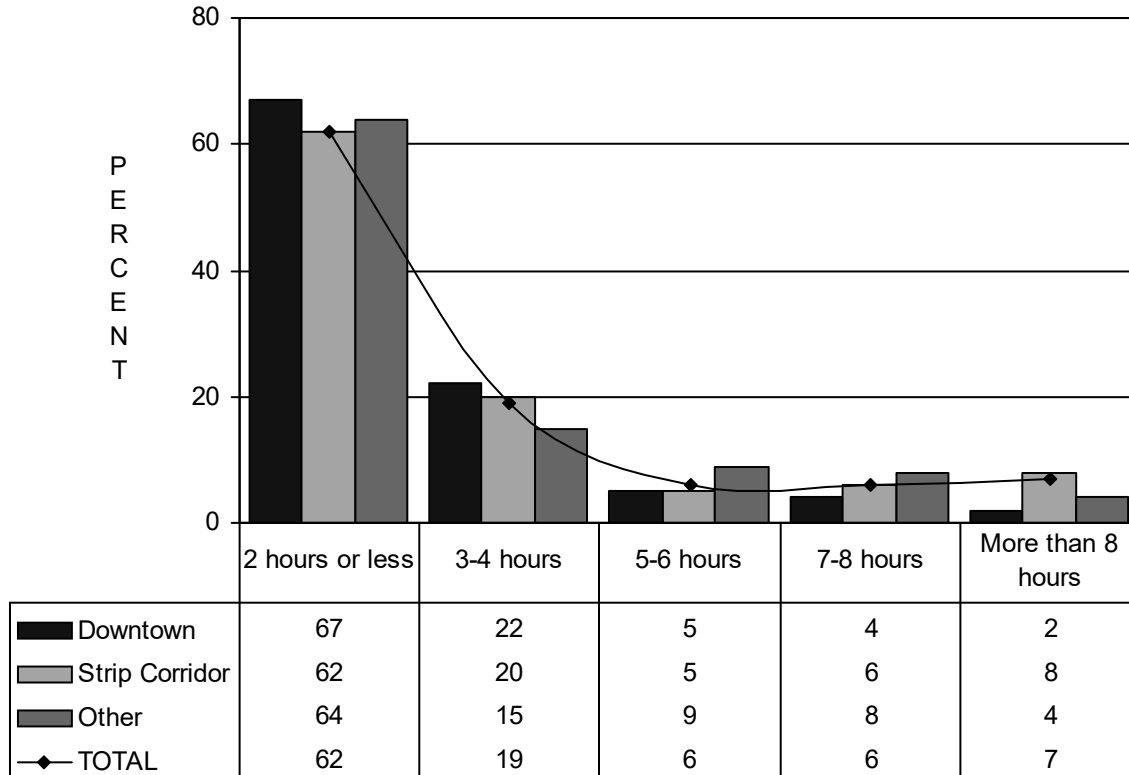
FIGURE 47
Whether Gambled While In Las Vegas



Only "yes" responses are reported in this figure.

Eighty-one percent (81%) of visitors said they gambled on their most recent visit to Las Vegas. Downtown lodgers (92%) were more likely to have gambled than Strip Corridor lodgers (87%), and both were more likely to have gambled than Other lodgers (56%).

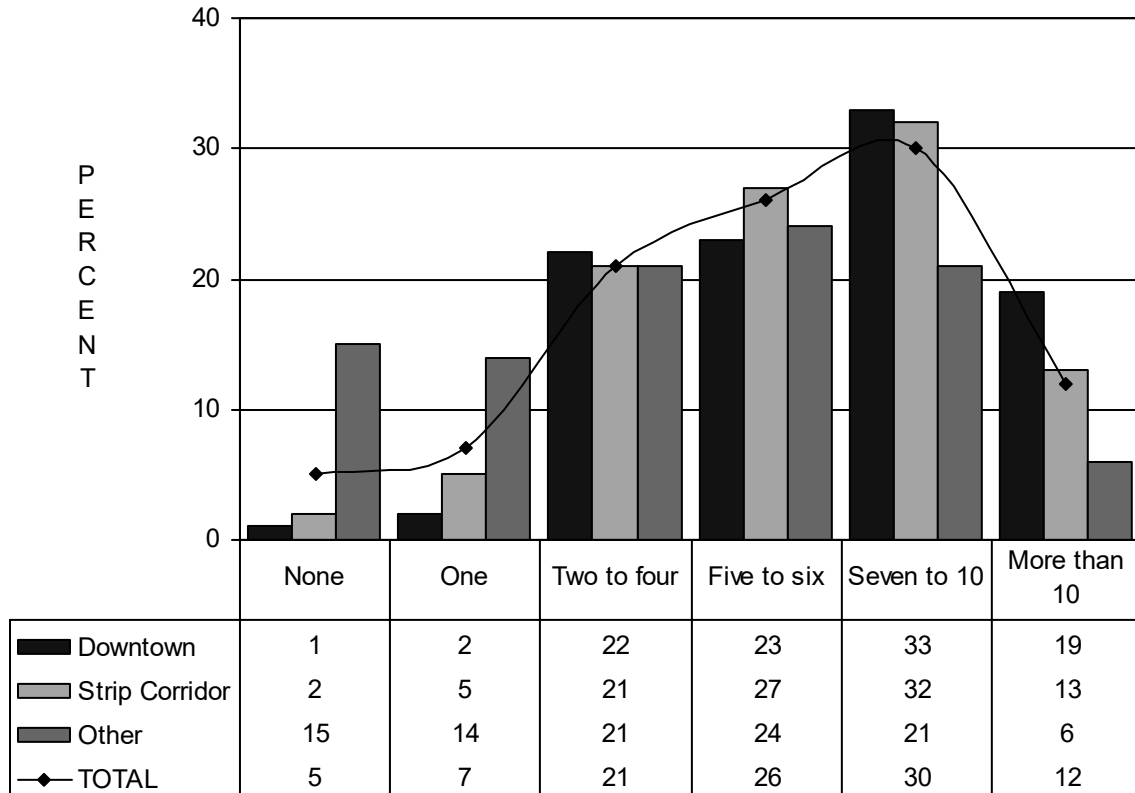
FIGURE 48
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



(Base Sizes: Downtown=182, Strip Corridor=2296, Other=425, TOTAL=2902)
(Means: Downtown=2.1, Strip Corridor=2.8, Other=2.7, TOTAL=2.7)

Among those visitors who said they gambled on their current trip to Las Vegas, on average, Downtown Lodgers (average of 2.1 hours per day) spent less time gambling than either Strip Corridor lodgers (2.8 hours) or Other area lodgers (2.7 hours).

FIGURE 49
Number Of Casinos Visited*

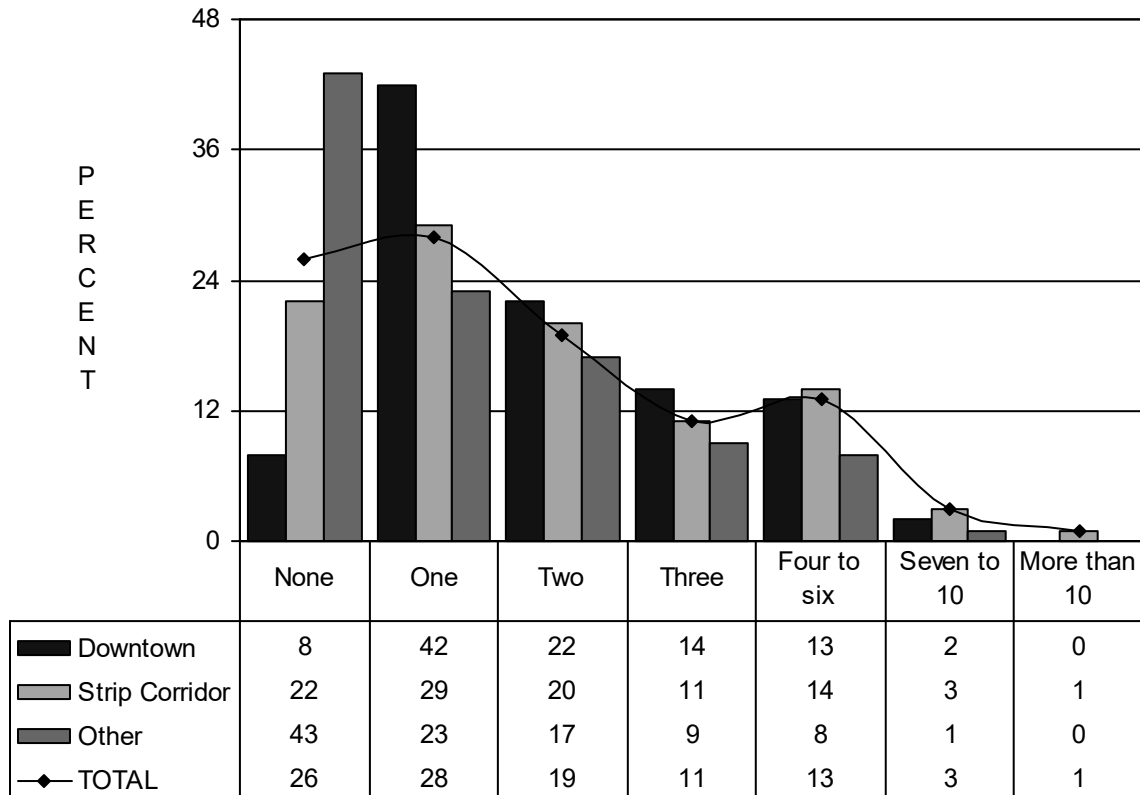


(Means: Downtown=7.6, Strip Corridor=6.8, Other=4.6, TOTAL=6.4)

All visitors were asked how many casinos they had visited on their current trip to Las Vegas. On average, Downtown lodgers (average of 7.6) visited more casinos than Strip Corridor lodgers (6.8), who in turn visited more casinos than Other lodgers (4.6).

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

FIGURE 50
Number Of Casinos Where Gambled*

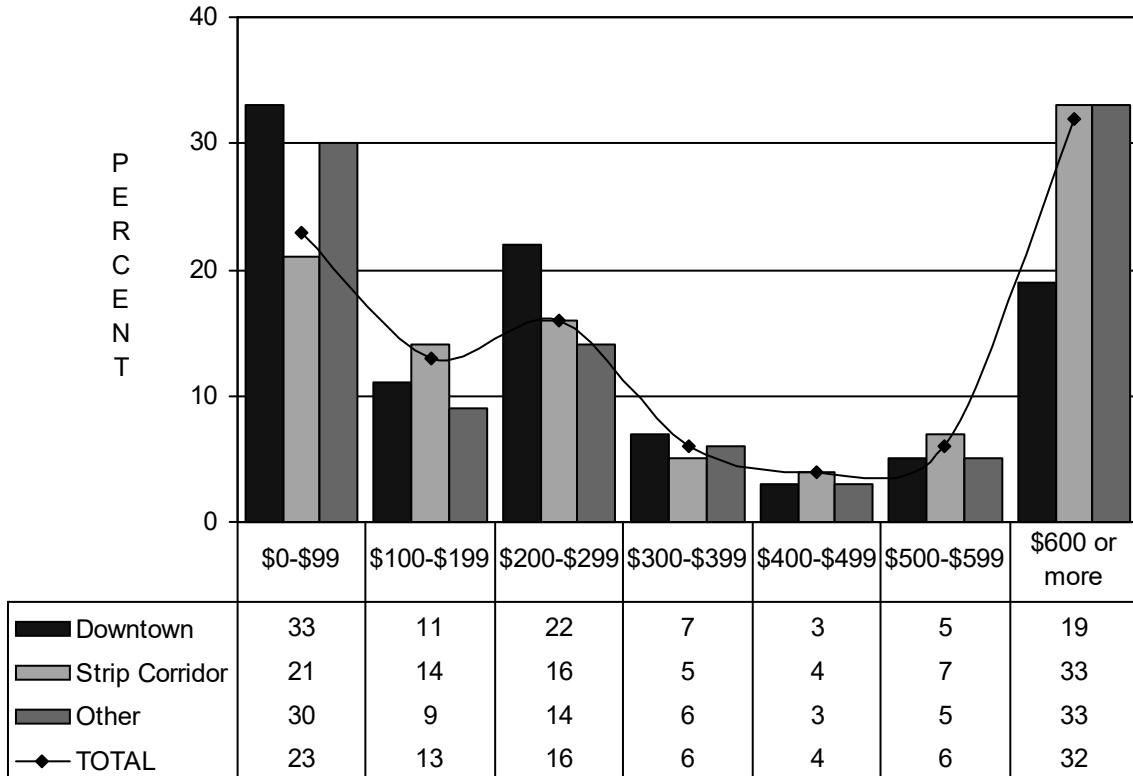


(Means: Downtown=2.0, Strip Corridor=2.1, Other=1.2, TOTAL=1.9)

All visitors were asked in how many casinos they had gambled on their current trip to Las Vegas. On average, Downtown (average of 2.0) and Strip Corridor lodgers (2.1) gambled in more casinos than Other lodgers (1.2).

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

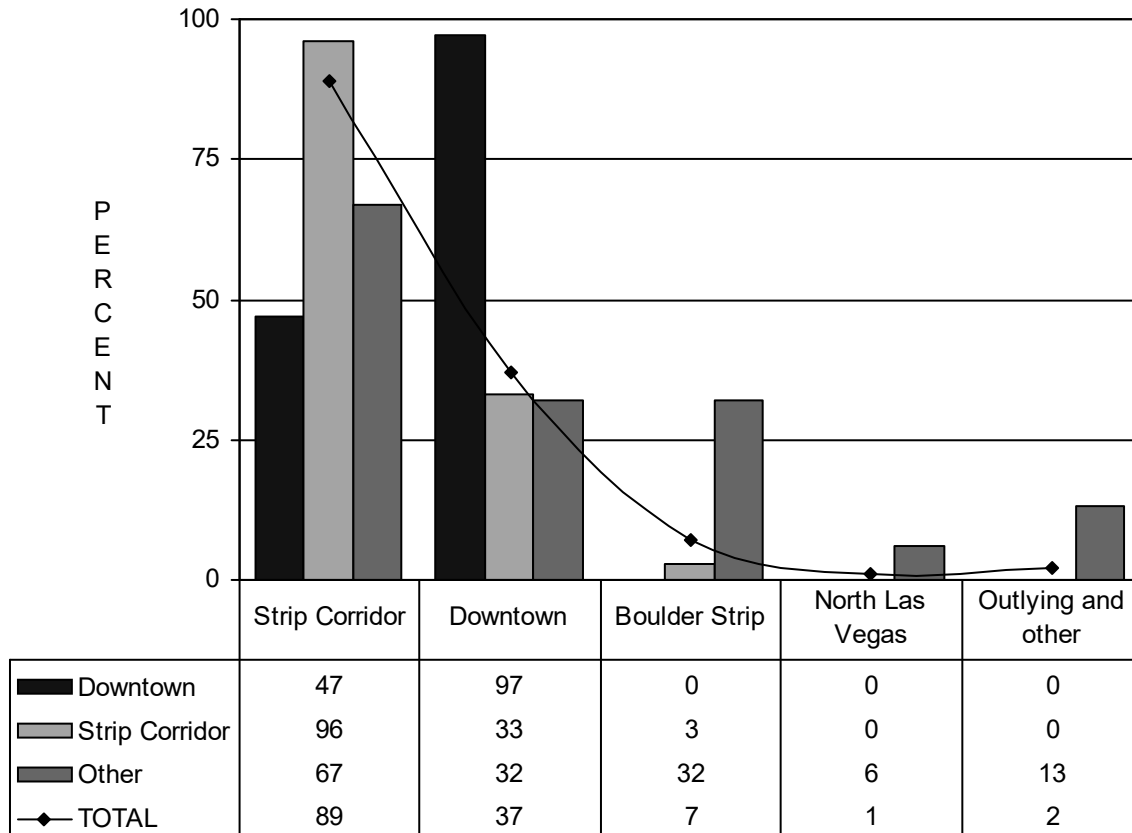
FIGURE 51
Trip Gambling Budget
(Among Those Who Gambled)



(Base Sizes: Downtown=182, Strip Corridor=2296, Other=425, TOTAL=2902)
(Means: Downtown=\$321.23, Strip Corridor=\$634.71, Other=\$471.27 TOTAL=\$591.06)

The average gambling budget among those who gambled was \$591.06. Strip Corridor lodgers (average of \$634.71) budgeted more on average for gambling than Other area lodgers (\$471.27), while Downtown lodgers (\$321.23) budgeted the least.

FIGURE 52
Where Visitors Gambled
(Among Those Who Gambled)

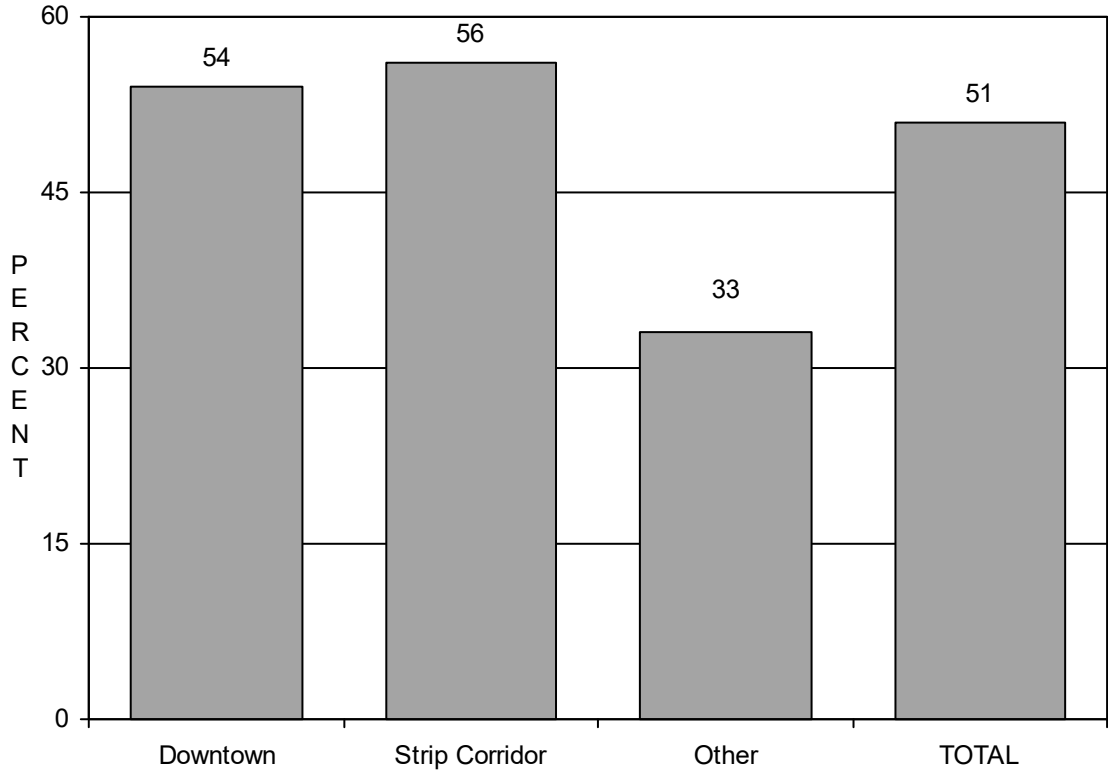


(Base Sizes: Downtown=182, Strip Corridor=2296, Other=425, TOTAL=2902)

As would be expected, nearly all Downtown lodgers who gambled said they did so Downtown (97%) and nearly all Strip Corridor lodgers who gambled said they did so in the Strip Corridor (96%). Visitors who stayed in other areas were more likely to have gambled on the Boulder Strip (32%), North Las Vegas (6%) or Other areas (13%) than either Strip Corridor or Downtown lodgers.

ENTERTAINMENT

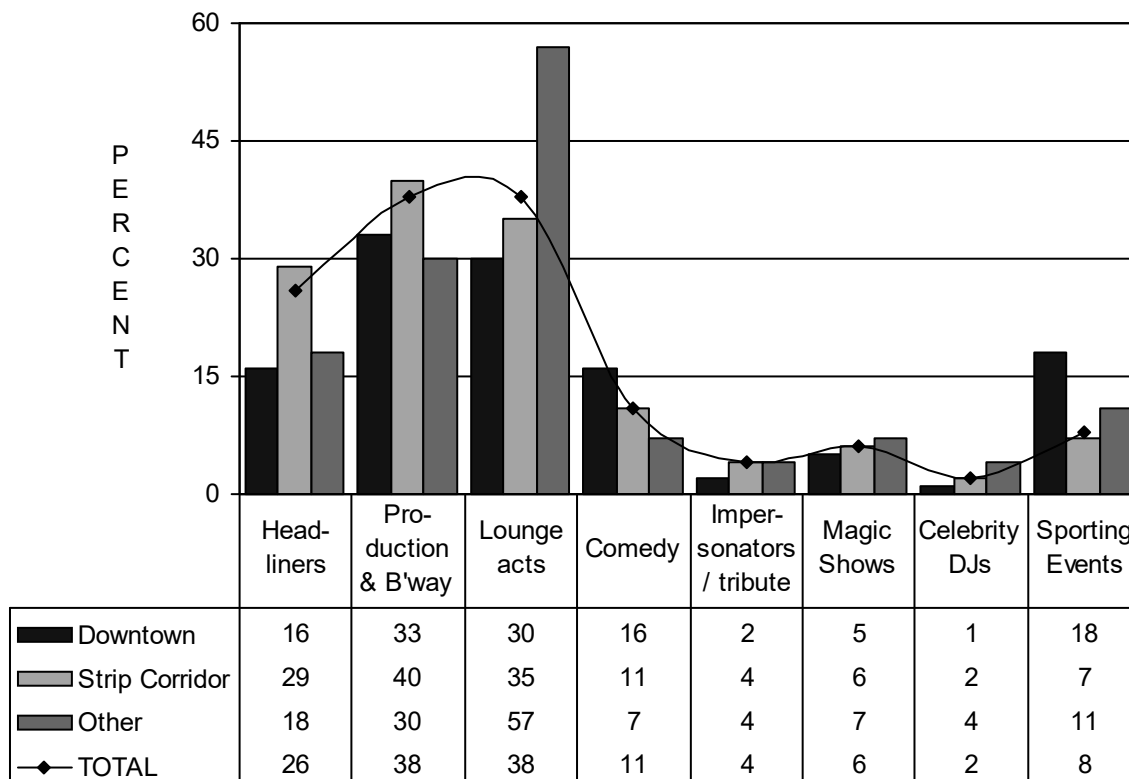
FIGURE 53
Attended A Show*



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

One-half (51%) of visitors attended shows during stay in Las Vegas. Downtown lodgers (54%) and Strip Corridor lodgers (56%) were more likely to have attended a show than Other area lodgers (33%).

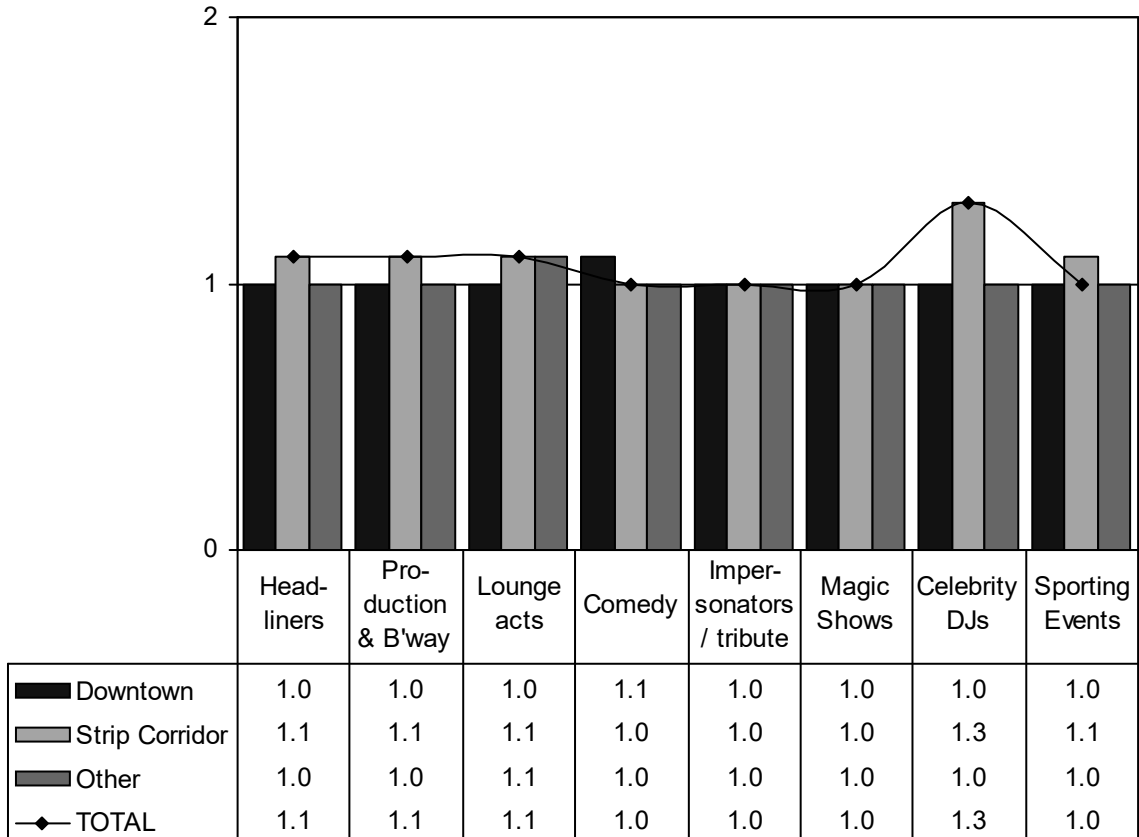
FIGURE 54
Types Of Entertainment*
(Among Those Who Attended Some Form Of Entertainment)



*Multiple responses permitted.
(Base Sizes: Downtown=106, Strip Corridor=1481, Other=254, TOTAL=1841)

Among those visitors who saw a show while on their most recent trip to Las Vegas, about four in ten went to a lounge act and/or a Broadway or production show (both 38%). Strip Corridor lodgers (29%) were the most likely segment to have seen a headliners show and were more likely than Other area lodgers to have seen a Broadway or production show (40% vs. 30%). Downtown lodgers (18%) were more likely than Strip Corridor lodgers (7%) to have seen one or more sporting events. Other area lodgers were the most likely segment to have seen Lounge acts (57%) and the least likely segment to have seen comedy shows (7%).

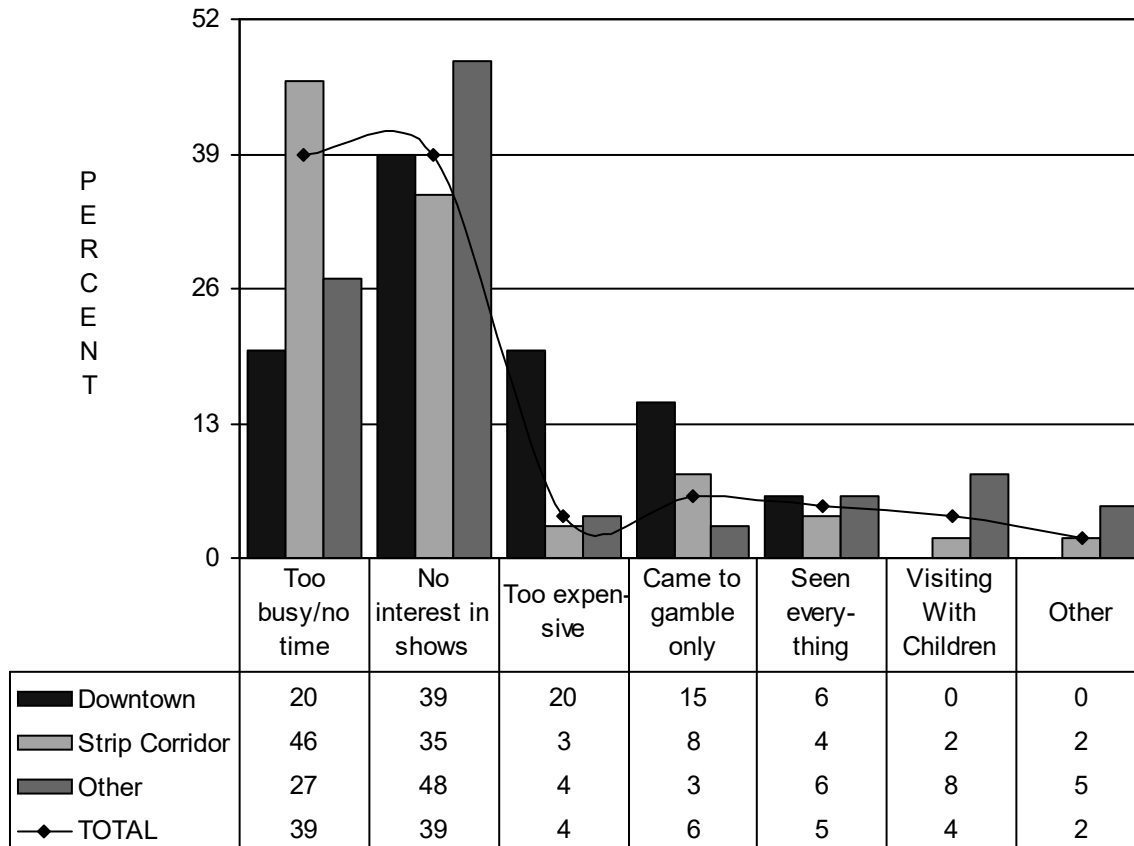
FIGURE 55
Average Number Of Shows Attended
(Among Those Who Attended Some Form Of Entertainment)



Multiple responses permitted.
(Base Sizes: Downtown=106, Strip Corridor=1481, Other=254, TOTAL=1841)

We looked at the average number of times visitors attended each type of show *among those who attended shows*. Downtown Lodgers (1.1) attended on average more comedy shows than both Other area lodgers and Strip Corridor lodgers (both at 1.0). On average, Strip Corridor lodgers saw more production or Broadway shows than Other area lodgers (1.1 vs. 1.0).

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

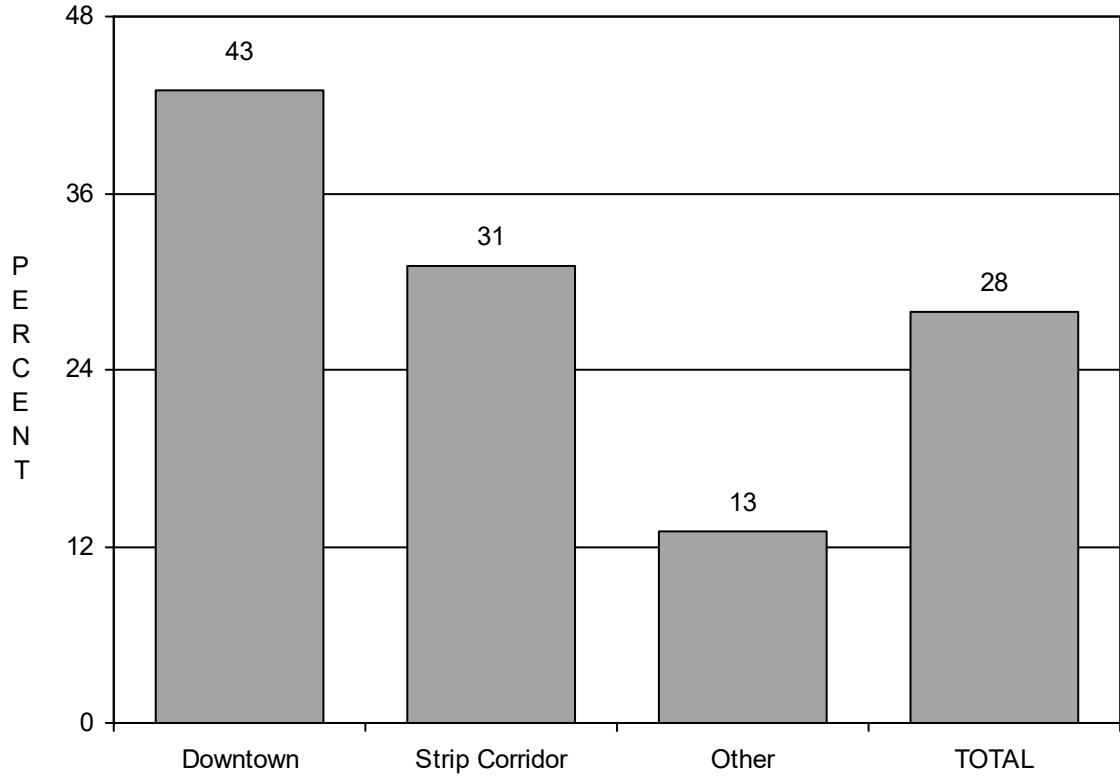


(Base Sizes: Downtown=70, Strip Corridor=973, Other=460, TOTAL=1503)

Visitors who did not attend any shows while on their current trip to Las Vegas were asked why. Thirty-nine percent (39%) said it was because they were too busy to see a show, while another 39% said it was because they had no interest in shows. Strip Corridor lodgers (46%) were more likely than Downtown (20%) and Other lodgers (27%) to have said that they were too busy. Other non-Downtown lodgers were more likely than Strip Corridor lodgers to have said it was because they had no interest (48% vs. 35%) or because they had children with them (8% vs. 2%). Downtown lodgers (20%) were more likely than Other lodgers (4%) and Strip Corridor lodgers (3%) to say that shows were too expensive. Both Downtown (15%) and Strip Corridor lodgers (8%) were more likely than Other lodgers (3%) to say that they came to Las Vegas to gamble only.

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

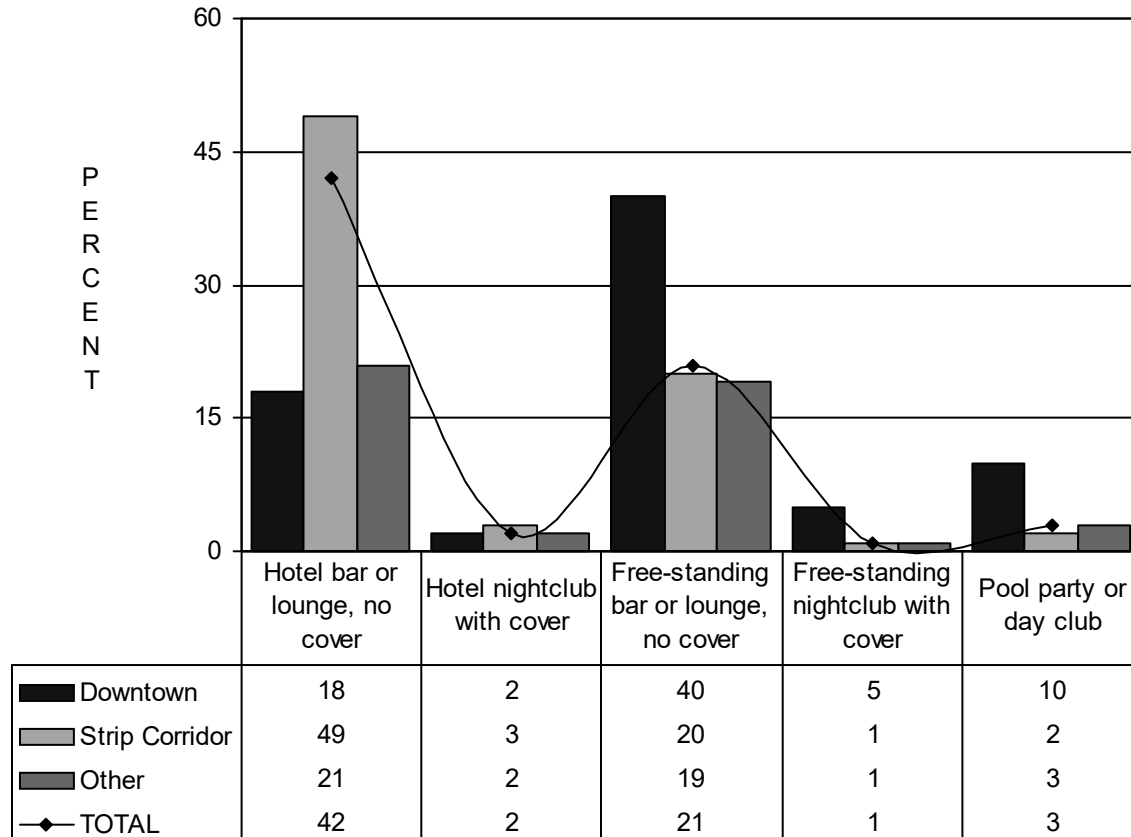
FIGURE 57
Whether Have Been To Other Paid Attractions



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 — such as theme parks or water parks. Downtown lodgers (43%) were the most likely segment to have done so while Other area lodgers (13%) were the least likely segment.

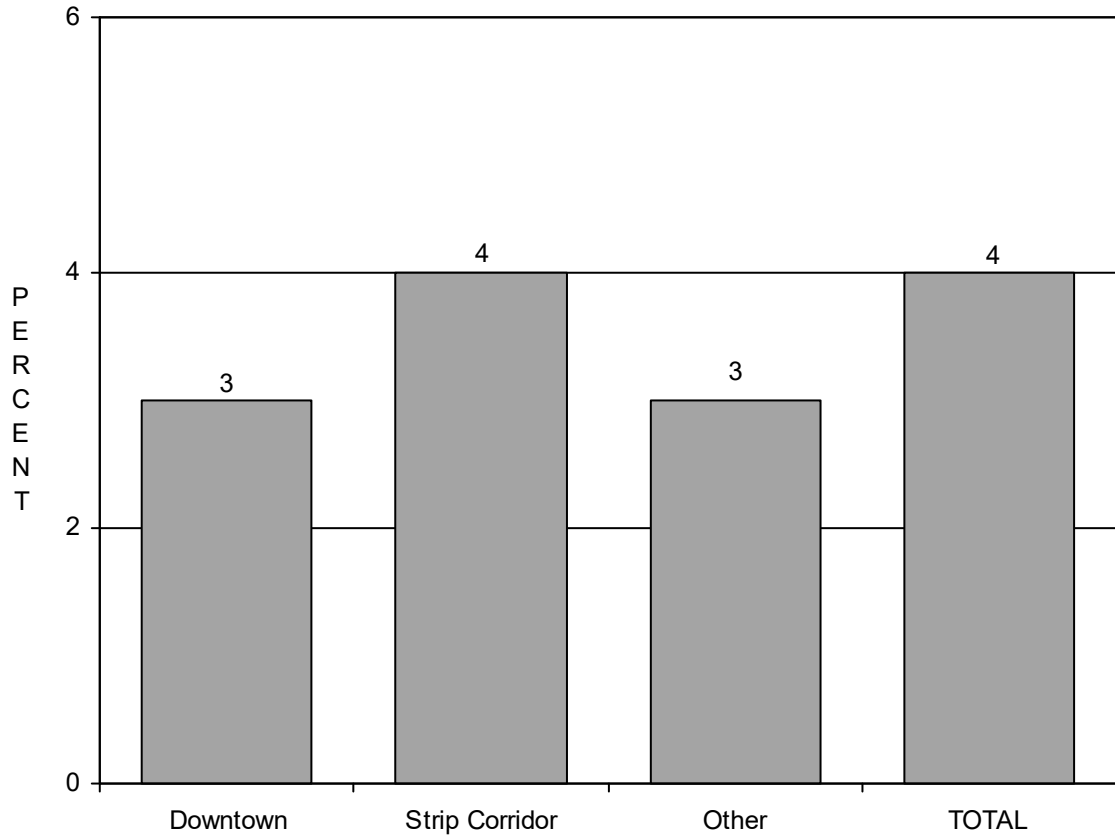
FIGURE 58
Whether Has Been To Nightclubs, Bars, And Lounges



Only "yes" responses are reported in this figure.

We asked visitors if they visited nightclubs, bars, lounges, or pool parties or day clubs while on their current visit to Las Vegas. Strip Corridor lodgers (49%) were the most likely segment to have been to a hotel bar or lounge without a cover charge. Downtown lodgers (40%) were the most likely segment to have been to a free-standing bar or lounge without a cover charge. Downtown lodgers (10%) were also the most likely segment to have been to a pool party or day club.

FIGURE 59
Whether Visited A Spa*



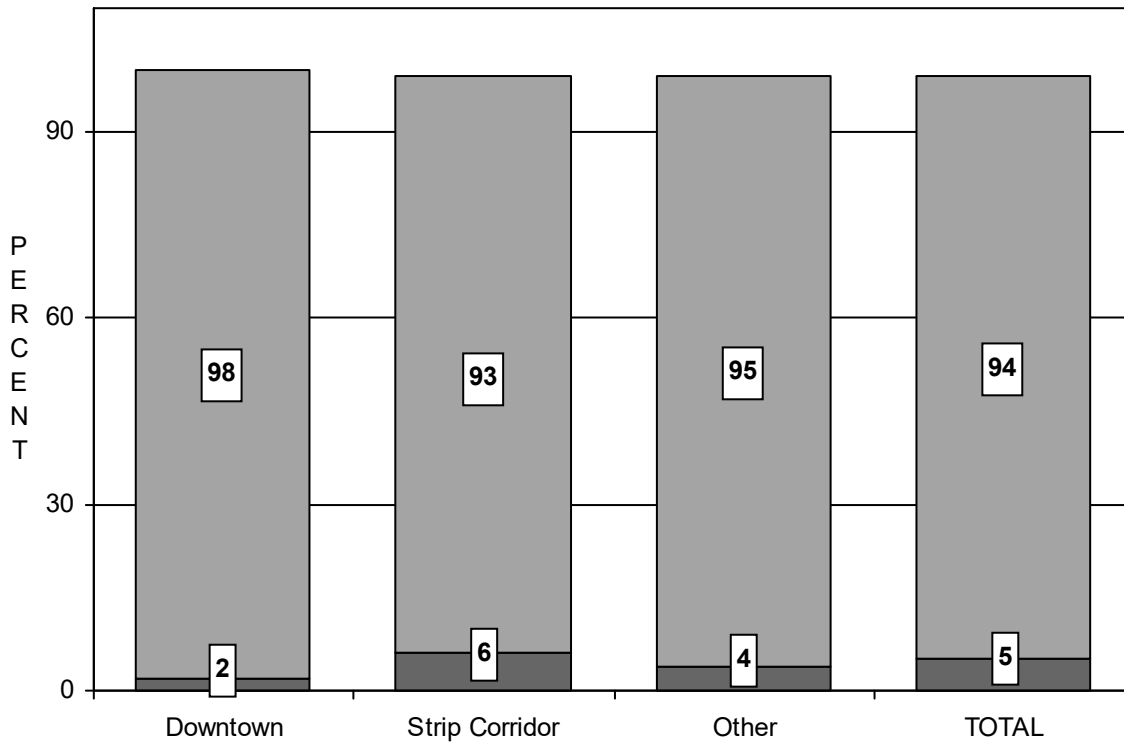
Only "yes" responses are reported in this figure.

When asked if they had visited a spa during their current visit to Las Vegas, 4% of all visitors said they had. There were no differences among the subgroups on this measure.

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

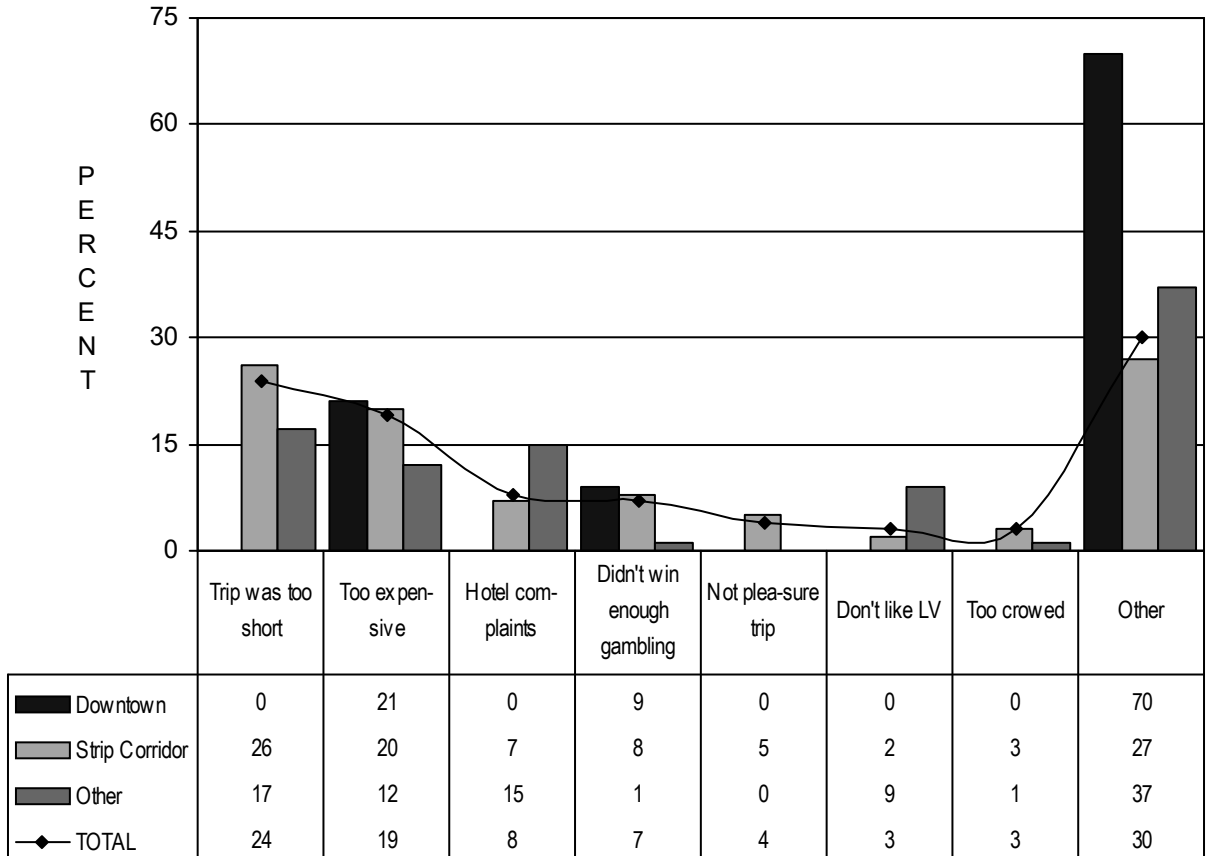
ATTITUDINAL INFORMATION

FIGURE 60
Satisfaction With Visit



Ninety-four percent (94%) of visitors said they were “very satisfied” with their latest visit to Las Vegas. Downtown lodgers (98%) were more likely than Strip Corridor lodgers (93%) to say they were very satisfied.

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



(Base Sizes: Downtown=4*, Strip Corridor=156, Other=32*, TOTAL=192)

Visitors who were not completely satisfied with their visit were asked why. Among the most common reasons given were that the trip was too short (24%) or that it was too expensive (19%). Due to the small sample sizes for both Downtown and Other area lodgers there were no statistically significant differences between these lodging segments with respect to their reason for not being completely satisfied with their visit.

* Note the small base sizes for Downtown and Other lodgers.

VISITOR DEMOGRAPHICS

With regards to visitor demographics, Downtown lodgers were more likely than Strip Corridor lodgers to be):

- Unemployed (10% vs. 1% of Strip Lodgers) or a student (10% vs. 3% of Strip Lodgers).
- Single (41% vs. 20% of Strip Corridor lodgers).
- From the West (55% vs. 43% of Strip Corridor lodgers) and from Arizona (13% vs. 8% of Strip Corridor lodgers).
- Between 21 - 29 years old (34% vs. 14% of Strip Lodgers).
- Having an annual household income of less than \$20,000 (28% vs. 5% of Strip Corridor lodgers).

Strip Corridor lodgers were more likely than Downtown lodgers to be:

- Retired (20% vs. 12% of Downtown lodgers).
- Married (74% vs. 55% of Downtown lodgers).
- A college graduate or more (55% vs. 39% of Downtown lodgers).
- From the Southern United States (18% vs. 10% of Downtown lodgers).
- Having an annual household income of \$80,000 or more (45% vs. 14% of Downtown lodgers).
- Older on average (46.7 years vs. 39.9 years for Downtown lodgers).

FIGURE 62
VISITOR DEMOGRAPHICS

	Downtown	Strip Corridor	Other	TOTAL
<u>GENDER</u>				
Male	51%	51%	51%	51%
Female	49	49	49	49
<u>MARITAL STATUS</u>				
Married	55	74	75	73
Single	41	20	18	20
Separated/Divorced	3	5	6	5
Widowed	1	2	1	2
<u>EMPLOYMENT</u>				
Employed	65	70	66	69
Unemployed	10	1	2	2
Student	10	3	3	3
Retired	12	20	25	21
Homemaker	4	5	3	5
<u>EDUCATION</u>				
High school or less	20	15	20	17
Some college	27	19	21	21
College graduate	39	55	43	51
Trade/vocational school	15	10	17	12
<u>AGE</u>				
21 to 29	34	14	17	16
30 to 39	23	21	21	21
40 to 49	16	23	22	22
50 to 59	10	17	12	16
60 to 64	1	6	4	5
65 or older	16	18	24	19
MEAN	39.9	46.7	46.4	46.2
BASE	(197)	(2641)	(760)	(3599)

FIGURE 63
VISITOR DEMOGRAPHICS

	Downtown	Strip Corridor	Other	TOTAL
ETHNICITY				
White	78%	78%	72%	77%
African American/Black	9	9	11	9
Asian/Asian American	1	3	2	3
Hispanic/Latino	11	10	15	11
Other	0	0	0	0
HOUSEHOLD INCOME				
Less than \$20,000	28	5	7	6
\$20,000 to \$39,999	18	8	12	9
\$40,000 to \$59,999	20	12	17	13
\$60,000 to \$79,999	13	13	22	15
\$80,000 or more	14	45	28	40
No Answer	8	18	15	17
VISITOR ORIGIN				
<u>U.S.A.</u>	<u>82</u>	<u>85</u>	<u>91</u>	<u>86</u>
Eastern states*	8	10	9	10
Southern states†	10	18	15	17
Midwestern states‡	9	13	10	12
Western states§	<u>55</u>	<u>43</u>	<u>58</u>	<u>47</u>
California	<u>23</u>	<u>20</u>	<u>24</u>	<u>21</u>
Southern California	19	17	22	18
Northern California	5	3	2	3
Arizona	13	8	13	9
Other West	18	15	21	16
Foreign	<u>18</u>	<u>15</u>	<u>9</u>	<u>14</u>
BASE	(197)	(2641)	(760)	(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.