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425 2nd Street
Suite 400
San Francisco, CA 94107
Telephone: (415) 974-6620
Facsimile: (415) 947-0260
www.glsresearch.com

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LAS VEGAS VISITOR PROFILE

Calendar Year 2019

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

Prepared for:

Las Vegas Convention and Visitors Authority

By:

GLS Research

SOUTHERN CALIFORNIA AND INTERNATIONAL VISITOR VERSION

ACKNOWLEDGMENTS

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

VISITOR PROFILE STUDY

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SOUTHERN CALIFORNIA AND INTERNATIONAL VISITOR
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SOUTHERN CALIFORNIA AND INTERNATIONAL VISITOR VERSION

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

- **VISITORS FROM SOUTHERN CALIFORNIA** — 18% of all visitors.
- **OTHER U.S. DOMESTIC VISITORS** — 68% of all visitors.
- **VISITORS FROM FOREIGN COUNTRIES** — 14% of all visitors.

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

VISITORS FROM SOUTHERN CALIFORNIA

Visitors from Southern California were the most likely to have:

- Visited Las Vegas before (87%).
- Visited Las Vegas primarily to gamble (21%).
- Planned their trip to Las Vegas one week to one month in advance (52%).
- Used a hotel/casino host (38%) or responded to an email offer (26%) in planning their trip.
- Booked their accommodations by calling the property directly (34% of those who stayed in a hotel/RV Park).
- Booked their lodging one week to one month in advance of their trip (55% among those staying in a hotel/RV Park).
- Received a casino comp for their lodging (26% among those staying in a hotel room).
- Spent five or more hours per day gambling (28% among those who gambled).

Visitors from Southern California were more likely than other domestic visitors to be:

- Less than 40 years old (48% vs. 35%).
- Non-white (35% vs. 22%).

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

- \$323.05 on food and drink.
- \$104.94 on shopping.
- \$32.47 on shows and entertainment.

OTHER U.S. DOMESTIC VISITORS

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

- Used a website, social media, or apps to plan their trip to Las Vegas (72%).
- Used a third-party website or app to book their accommodations (43% among those staying in a hotel/RV Park).
- First heard about their room rate from a website (68% among non-package visitors who paid for their room).
- Had five or more adults in their immediate party (9%).
- Used Facebook (24%) or consulted reviews at online travel agencies (17%) while in Las Vegas to plan activities.
- Gambled during this trip to Las Vegas (83%).
- Seen at least one show during their current trip to Las Vegas (55%).

Compared to visitors from Southern California, they were more likely to have:

- Planned their trip to Las Vegas more than one month in advance (58% vs. 33%).
- Purchased a package or tour/travel group rate on this trip to Las Vegas (12% vs. 2%).
- Booked their accommodations in Las Vegas one month or more in advance (53% vs. 25%).

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

- \$443.12 on food and drink.
- \$205.29 on shopping.
- \$55.71 on shows and entertainment.

FOREIGN VISITORS

Foreign visitors were the most likely to have:

- Not visited Las Vegas before (53%).
- Visited Las Vegas primarily for vacation or pleasure (62%).
- Planned their trip to Las Vegas more than one month in advance (73%).
- Used a travel agent (41%), social media (48%), magazines or newspapers (41%), or printed brochures or travel guides (36%) to plan their trip to Las Vegas, and used a travel agent to book their accommodations (40% of those who lodged overnight).
- Visited Downtown (55%).
- Lodged on the Strip Corridor (80% of those who stayed overnight).
- Booked their accommodations in Las Vegas more than one month in advance (69% of those staying in a hotel/RV Park).
- Received a package or tour/travel group rate for their lodgings (48% of those who stayed in a hotel).
- Used Vegas.com (30%) or TripAdvisor (27%) to plan activities during their visit in Las Vegas.
- Been to paid attractions in Las Vegas (36%).
- During their visit to Las Vegas, foreign visitors spent an average of:
 - \$368.93 on food and drink.
 - \$209.48 on shopping.
 - \$57.29 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 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 behaviors, attitudes, and opinions of Southern California visitors, other U.S. domestic visitors, and foreign visitors are pointed out in the text of the report. The tables and charts in this report show data for all visitors and for the three visitor origin subgroups.

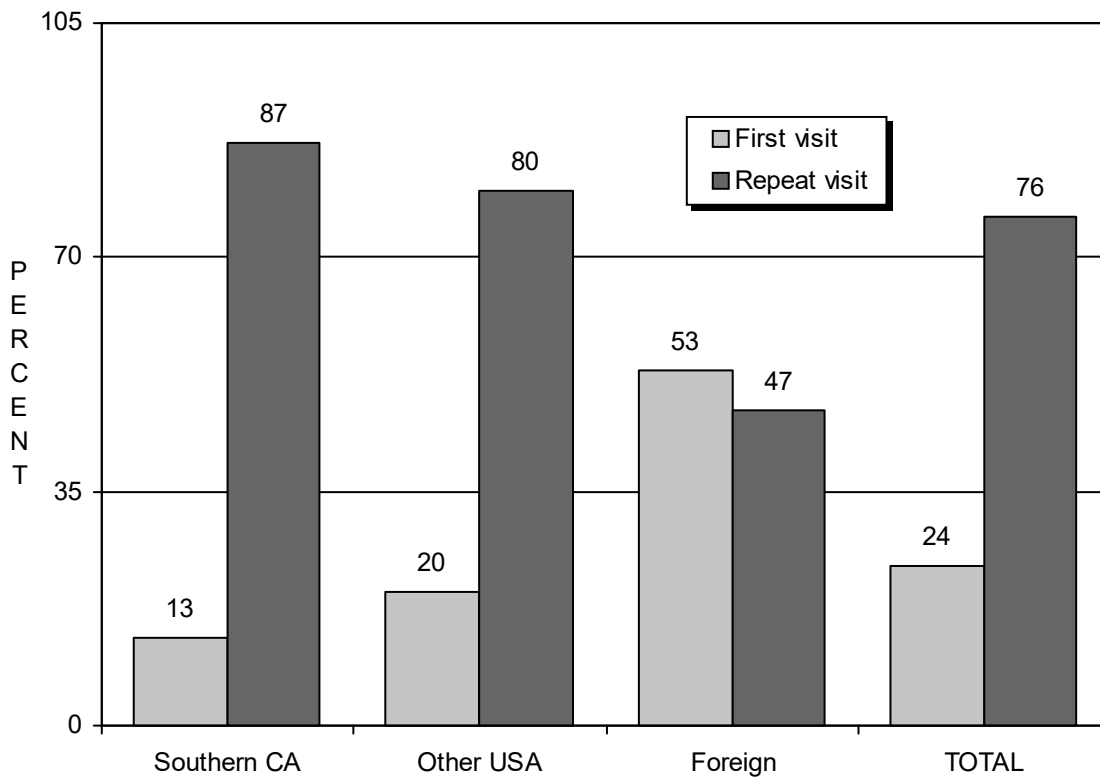
In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2019. These questions will be rotated back into the questionnaire in Calendar Year 2020 and subsequently asked every other year. These questions are noted in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

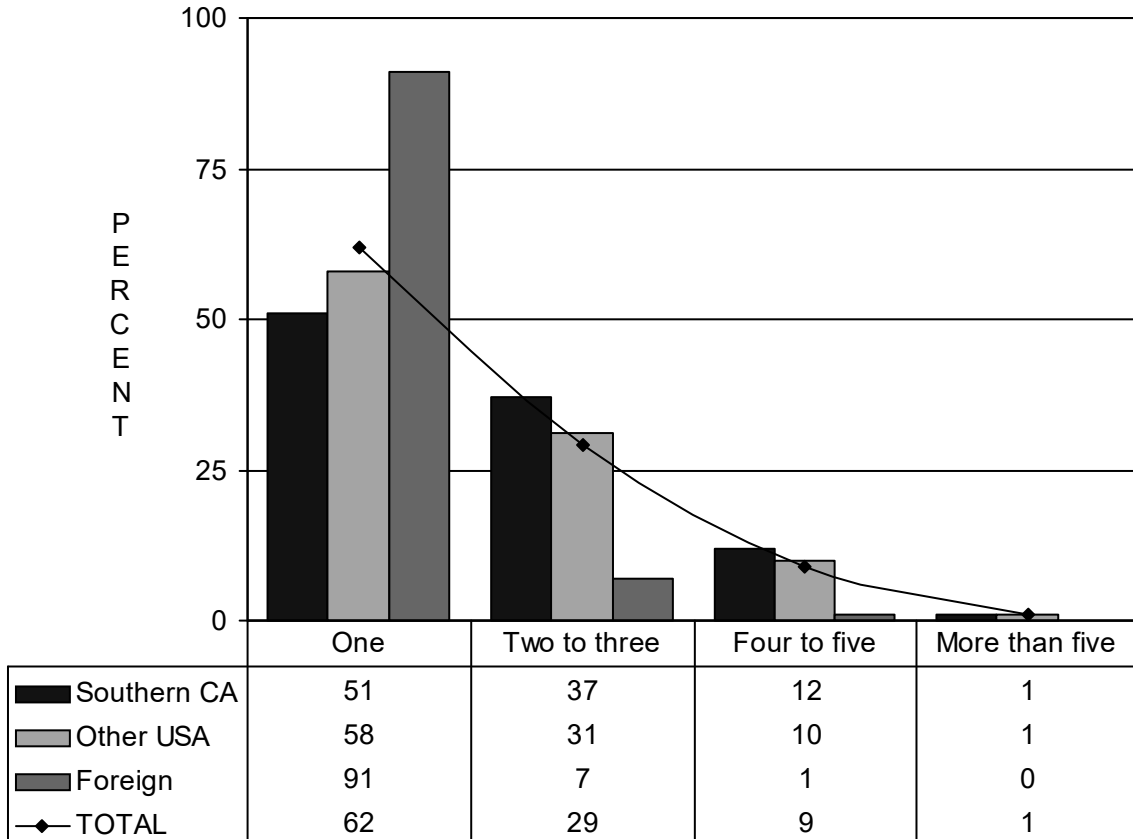
REASONS FOR VISITING

FIGURE 1
First Visit Vs. Repeat Visit



Southern California visitors (87%) were more likely than other domestic visitors (80%) to say they had visited Las Vegas before, and both were more likely than foreign visitors (47%) to be repeat visitors.

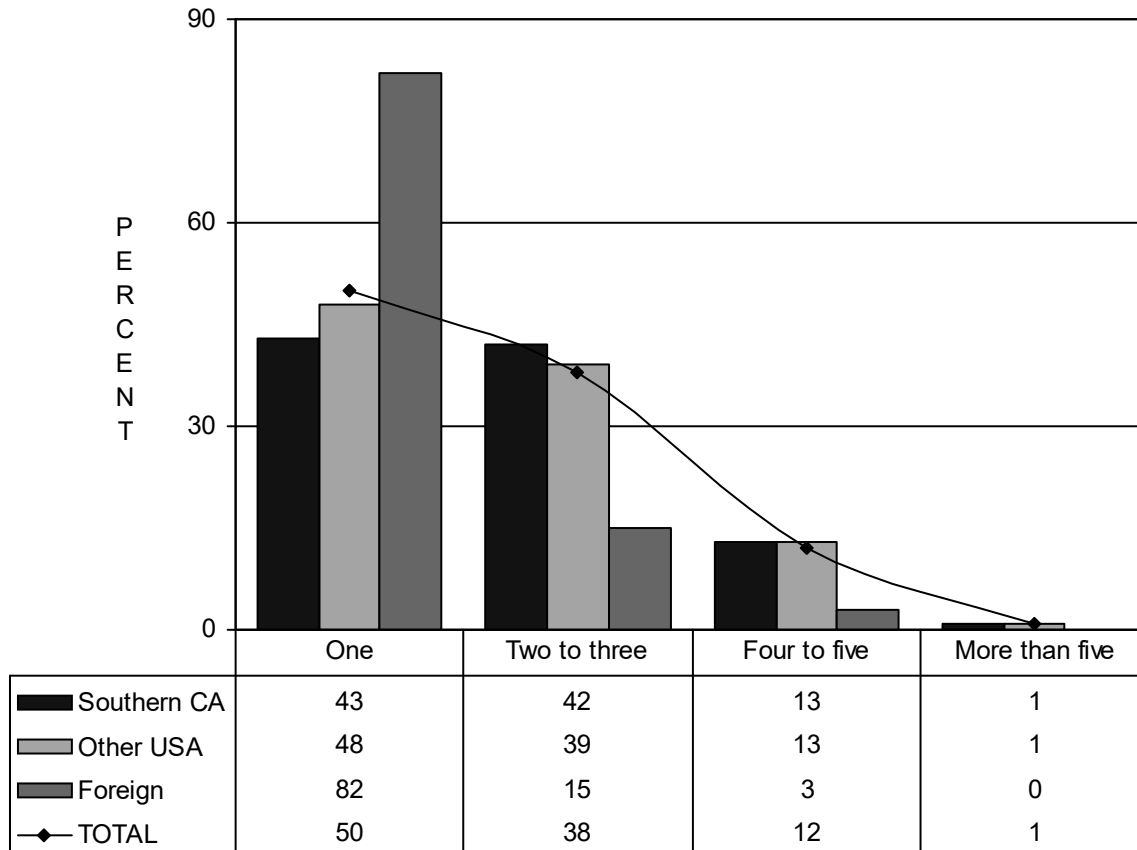
FIGURE 2
Frequency Of Visits In Past Year
(Among All Visitors)



(Means: Southern CA=2.0, Other USA=1.8, Foreign=1.2, TOTAL=1.7)

Forty-nine percent (49%) of Southern California visitors visited Las Vegas more than once during the past year, compared to 42% of other domestic visitors, and 9% of foreign visitors. The average number of visits during the past year was higher for Southern California visitors (2.0 visits) and other U.S. visitors (1.8 visits), than for foreign visitors (1.2 visits).

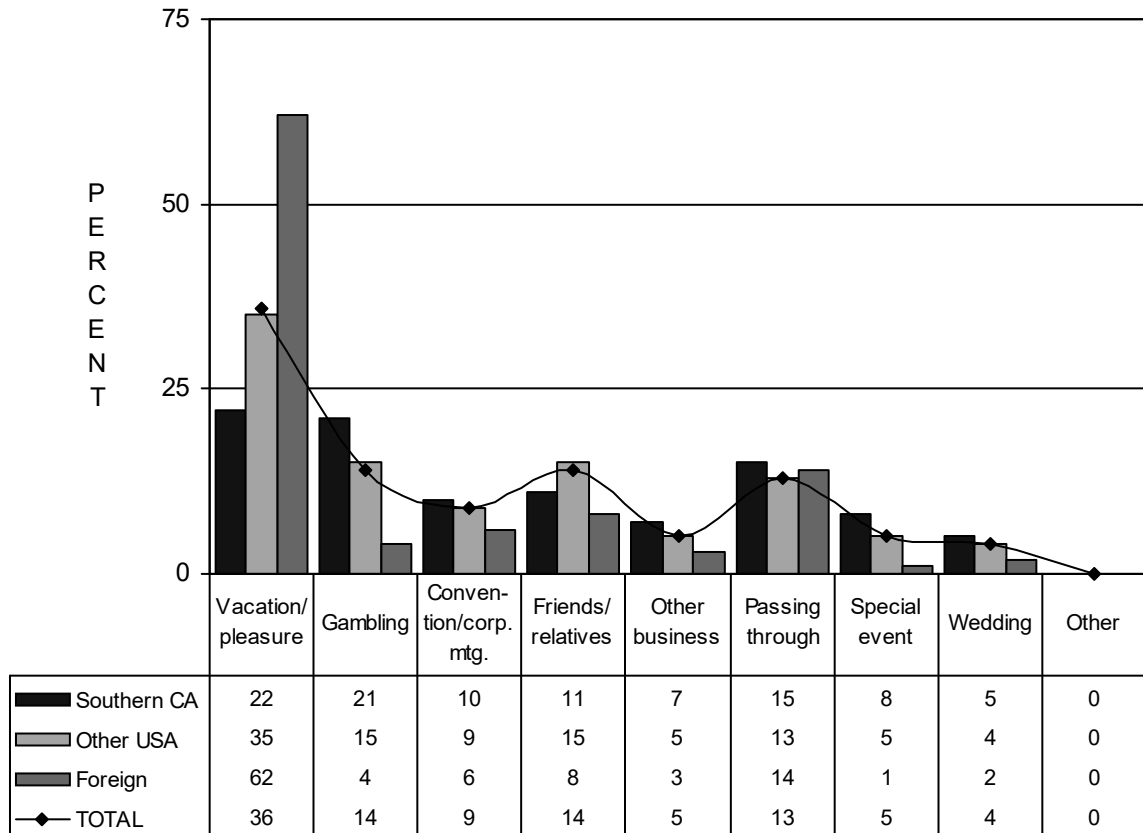
FIGURE 3
Frequency Of Visits In Past Year
(Among Repeat Visitors)



(Base Sizes: Southern CA=570, Other USA=1943, Foreign=235, TOTAL=2748)
(Means: Southern CA=2.1, Other USA=2.0, Foreign=1.3, TOTAL=2.0)

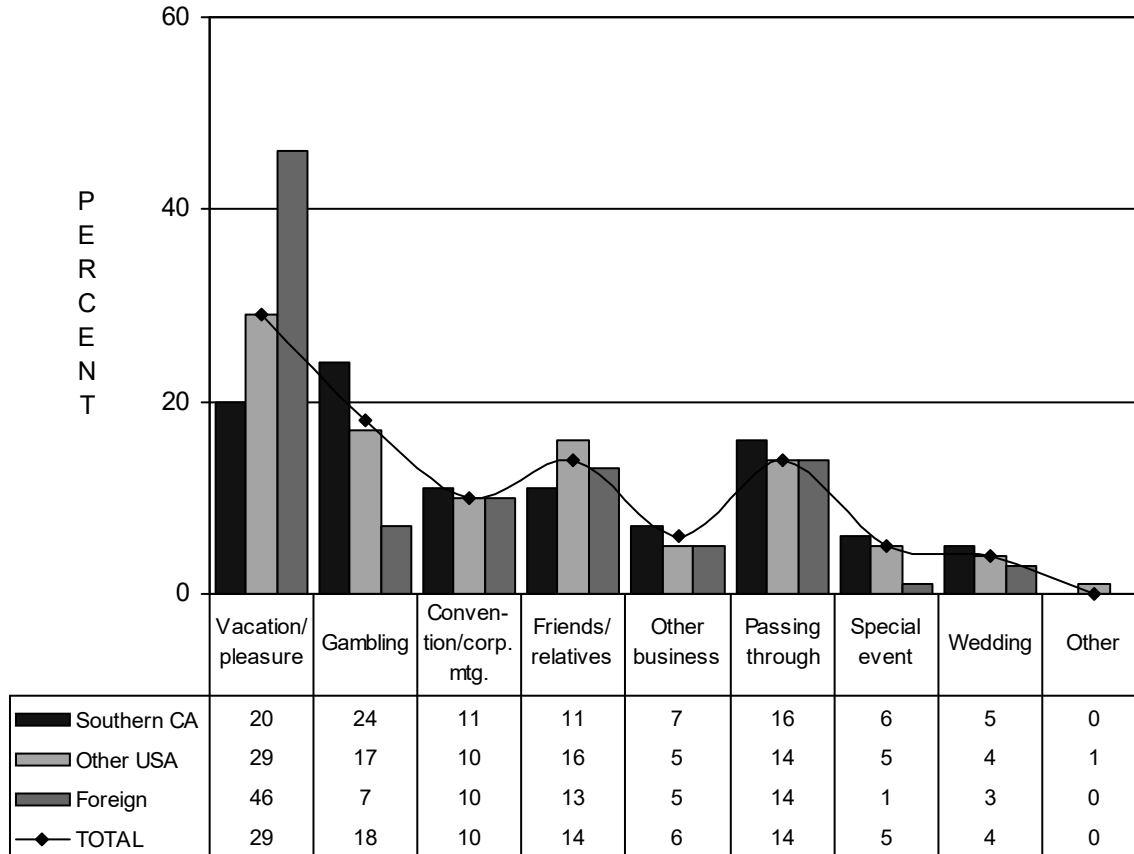
Looking at the frequency of visits in the past year among returning visitors, 57% of Southern California visitors visited Las Vegas more than once, compared to 53% of other domestic visitors and 18% of foreign visitors. As a result, the average number of visits during the past year was higher for Southern California visitors and other domestic visitors (2.1 and 2.0 visits respectively) than for foreign visitors (1.3 visits).

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



Looking at the primary purpose of the *current visit* among all visitors, foreign visitors (62%) were the most likely to say they were visiting Las Vegas for vacation or pleasure, followed by other domestic visitors (35%) and Southern California visitors (22%). Southern California visitors were the most likely segment to say they traveled to Las Vegas primarily to gamble (21%). Southern California visitors and other domestic visitors were also more likely to say they traveled to Las Vegas for a special event than foreign visitors (8% and 5% respectively vs. 1%).

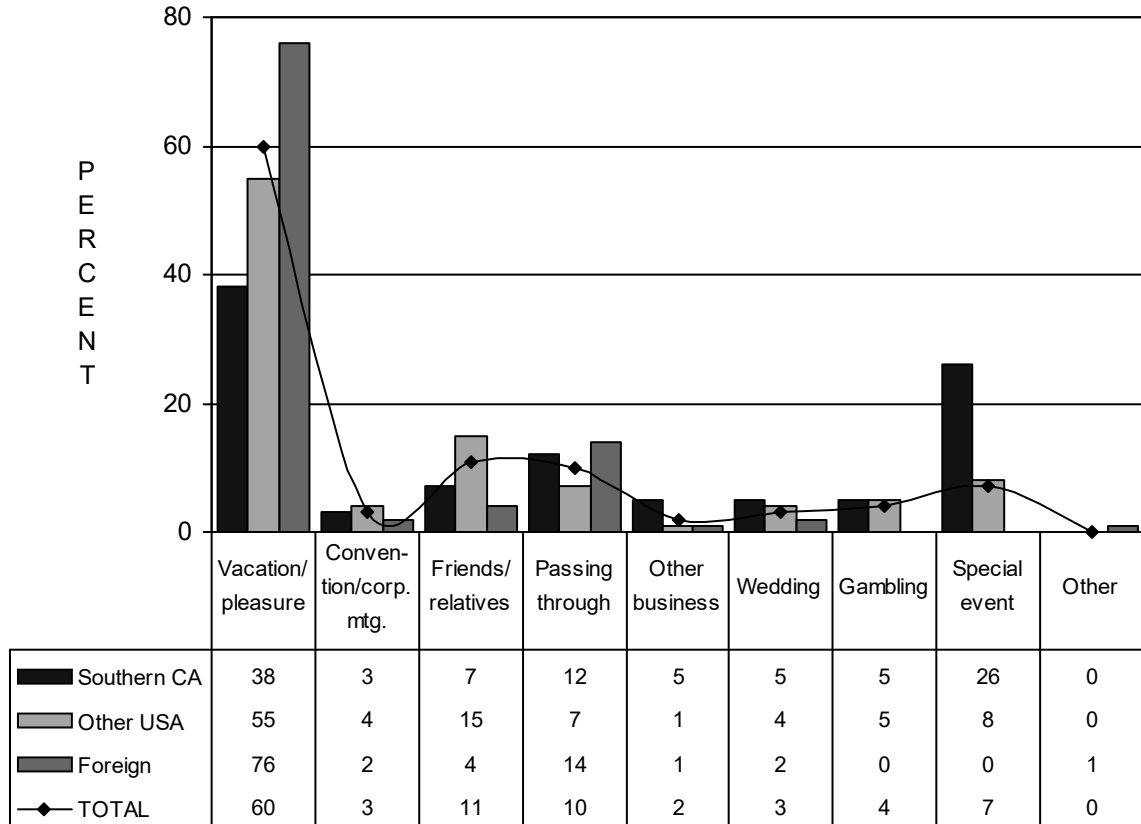
FIGURE 5
Primary Purpose Of Current Visit
(Among Repeat Visitors)



(Base Sizes: Southern CA=570, Other USA=1943, Foreign=235, TOTAL=2748)

Looking at repeat visitors' primary purpose for their *current visit*, foreign visitors (46%) were the most likely segment to say they came to Las Vegas primarily for vacation or pleasure. Southern California visitors (24%) were the most likely segment to say they were visiting primarily to gamble. Foreign visitors (1%) were the least likely segment to say they were visiting for a special event.

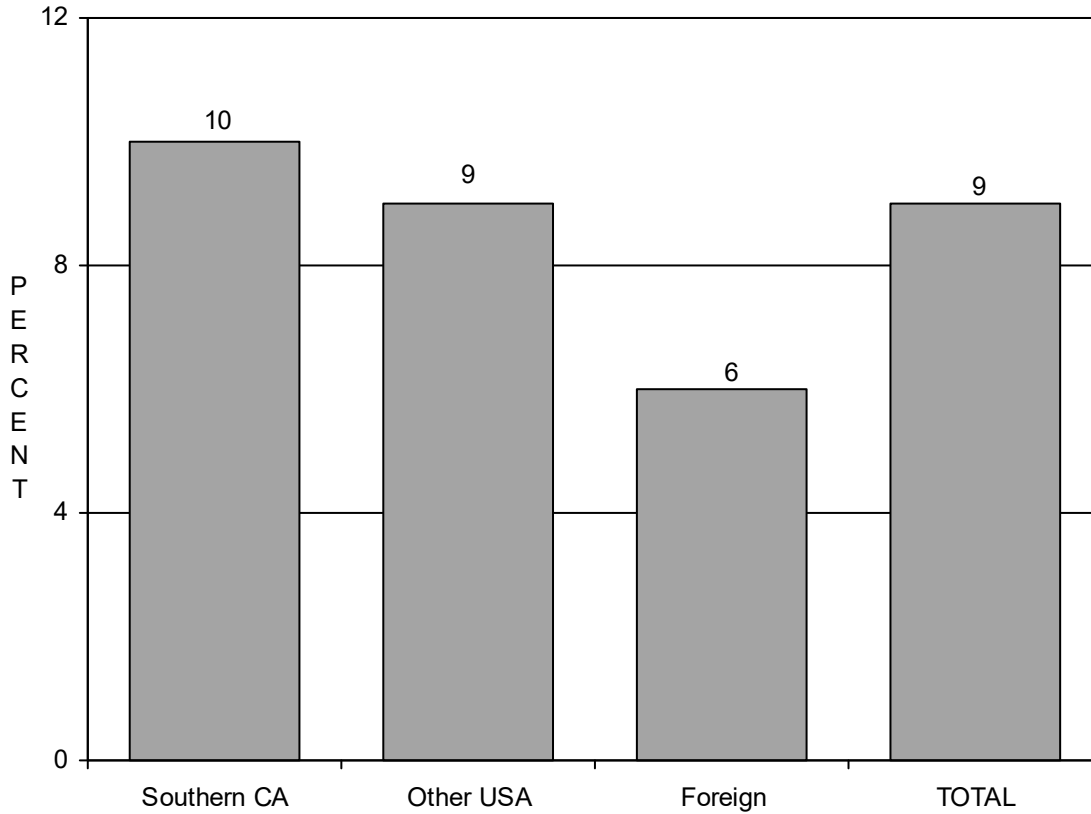
FIGURE 6
Primary Purpose Of Current Visit
(Among First-Time Visitors)



(Base Sizes: Southern CA=88, Other USA=493, Foreign=269, TOTAL=851)

We also looked at what first-time visitors to Las Vegas said was the purpose of their current visit. Foreign visitors (76%) were more likely to say they came to Las Vegas for vacation or pleasure than Southern California (38%) or other domestic visitors (55%). Southern California visitors (26%) were more likely than other domestic visitors (8%) or foreign visitors (0%) to say the purpose of their trip was to attend a special event. Other domestic visitors (15%) were more likely than foreign visitors (4%) to say they were visiting friends or relatives.

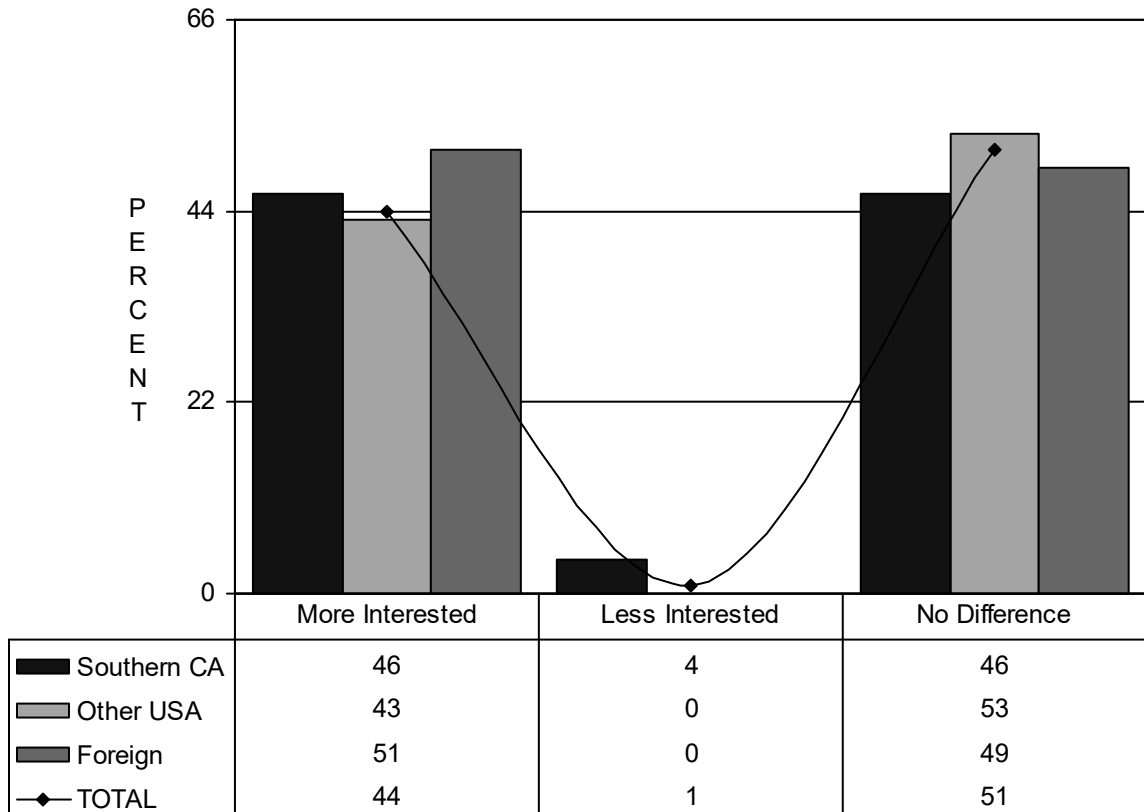
FIGURE 7
Conventions/Trade Shows/Associations/Corporate Meetings



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. Nine percent (9%) said they had. The segments did not differ significantly on this measure.

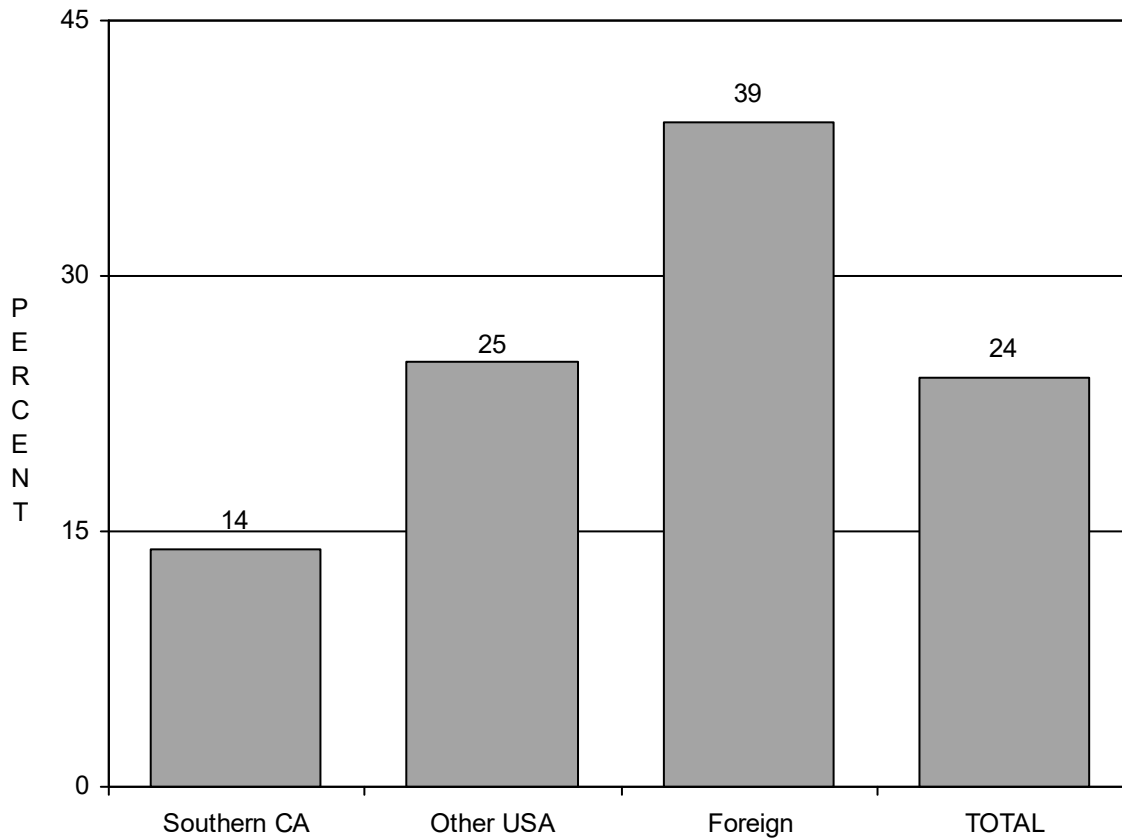
FIGURE 8
Interest In Attending Conventions, Trade Shows, Associations Or
Corporate Meetings In Las Vegas
(Among Visitors Who Attended A Convention,
Trade Show, Association Or Corporate Meeting)



(Base Sizes: Southern CA=64, Other USA=218, Foreign=31, 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. Overall, 44% of visitors said they would be more interested in attending if it was held in Las Vegas and 51% said it would make no difference. There were no significant differences among the segments on this measure.

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



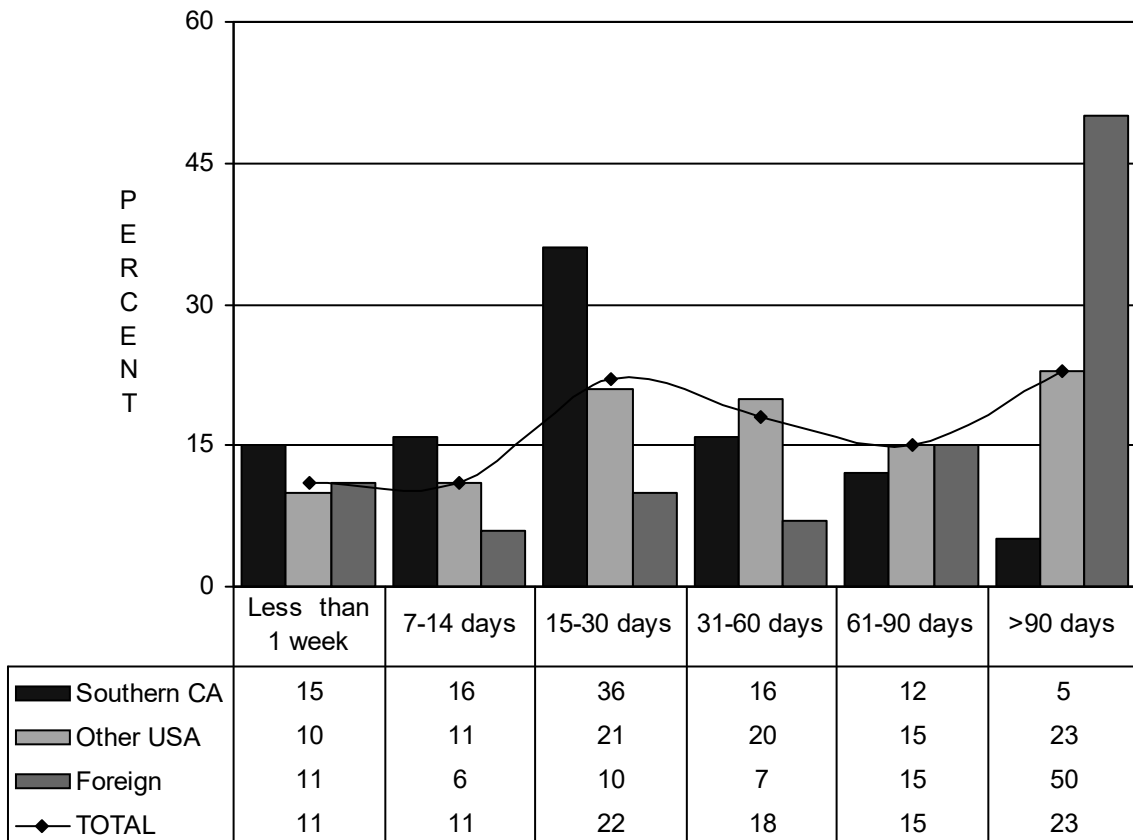
(Base Sizes: Southern CA=64, Other USA=218, Foreign=31, TOTAL=313)

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. Southern California convention visitors (14%) were the least likely segment to have brought someone else with them to Las Vegas.

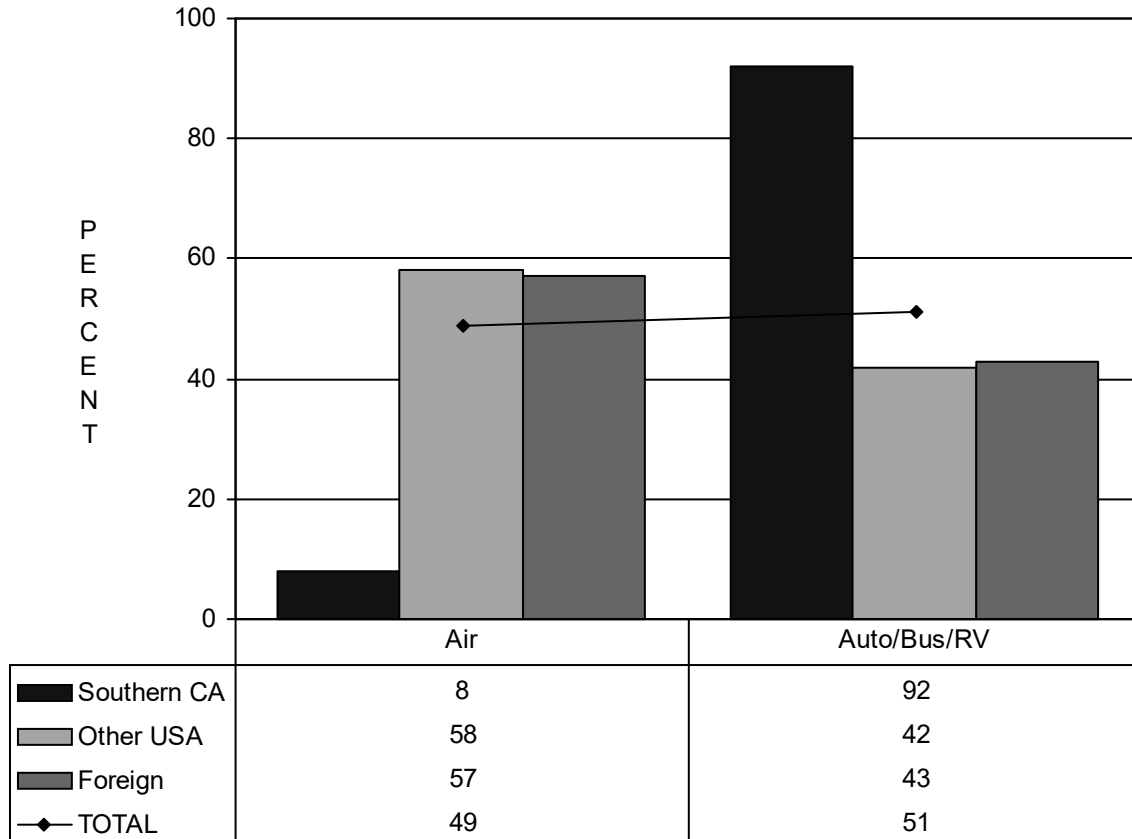
TRAVEL PLANNING

FIGURE 10
Advance Travel Planning



Foreign visitors tended to plan their trips the farthest in advance, followed by other domestic visitors, while Southern California visitors tended to have the shortest advance planning time. For example, 50% of foreign visitors planned their trip to Las Vegas more than 90 days in advance, compared to a significantly lower 23% of other domestic visitors and 5% of Southern California visitors. In contrast, over one-half (52%) of visitors from Southern California planned their trip one week to one month ahead of time, compared to 32% of other domestic visitors and only 16% of foreign visitors.

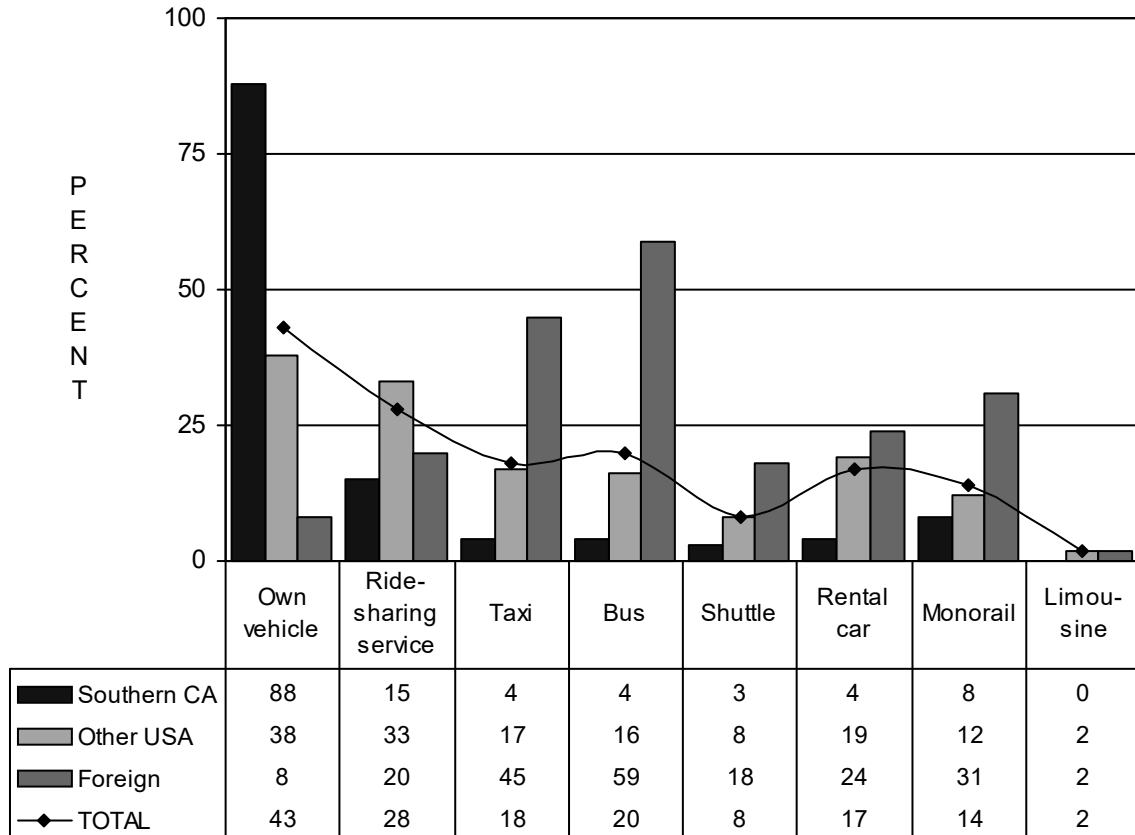
FIGURE 11
Transportation To Las Vegas



Southern California visitors (8%) were less likely to have traveled to Las Vegas by air than either other domestic visitors (58%) or foreign visitors (57%).

Southern California visitors (92%) were much more likely to have taken ground transportation to Las Vegas than either other domestic visitors (42%) or foreign visitors (43%).

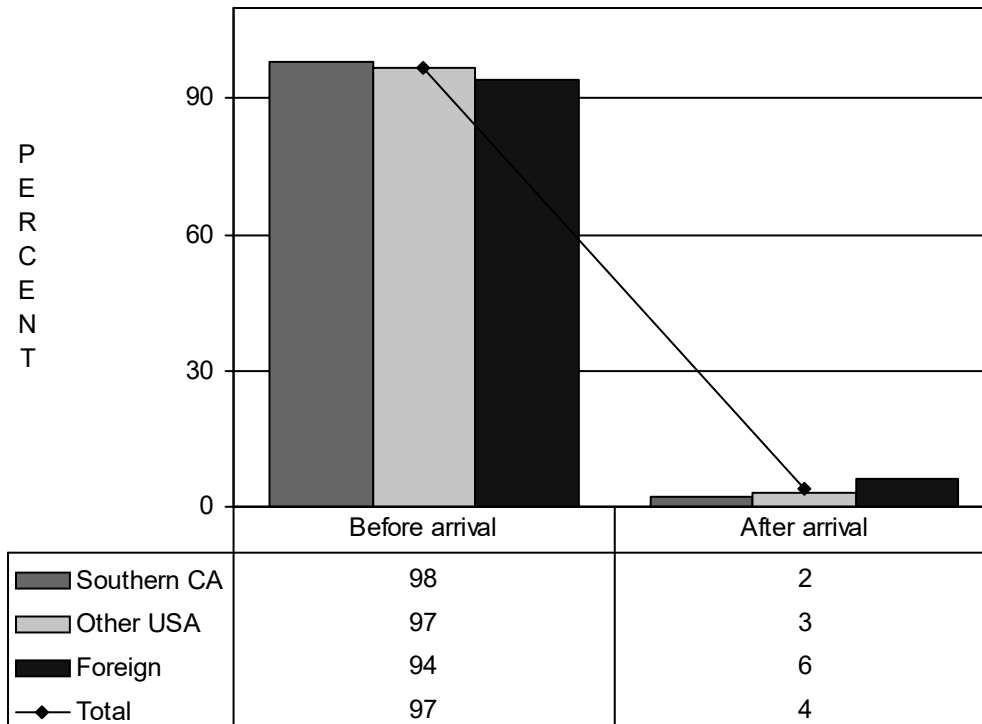
FIGURE 12
Local Transportation



Multiple responses permitted

Visitors were asked what types of local transportation they had used while in Las Vegas. Southern California visitors were the most likely to have used their own vehicles (88%) — and were the least likely to have used all other transportation methods. Other domestic visitors (38%) were also more likely to have used their own vehicle than foreign visitors (8%). Foreign visitors were the most likely segment to have taken a taxi (45%), used a local bus (59%), used a rental car (24%), used a hotel shuttle (18%), or taken the Monorail (31%). Other domestic visitors (33%) were more likely than Southern California (15%) or foreign visitors (20%) to say that they had used a ride-sharing service.

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

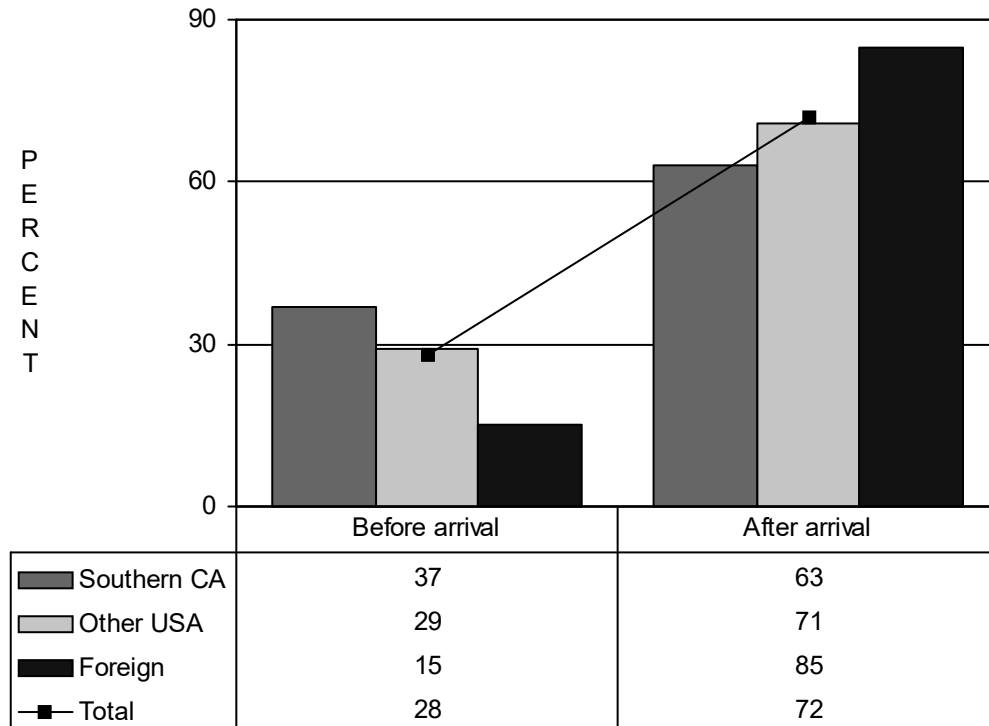


(Base Sizes: Southern CA=672, Other USA=2182, Foreign=726, TOTAL=3584)

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

* 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)

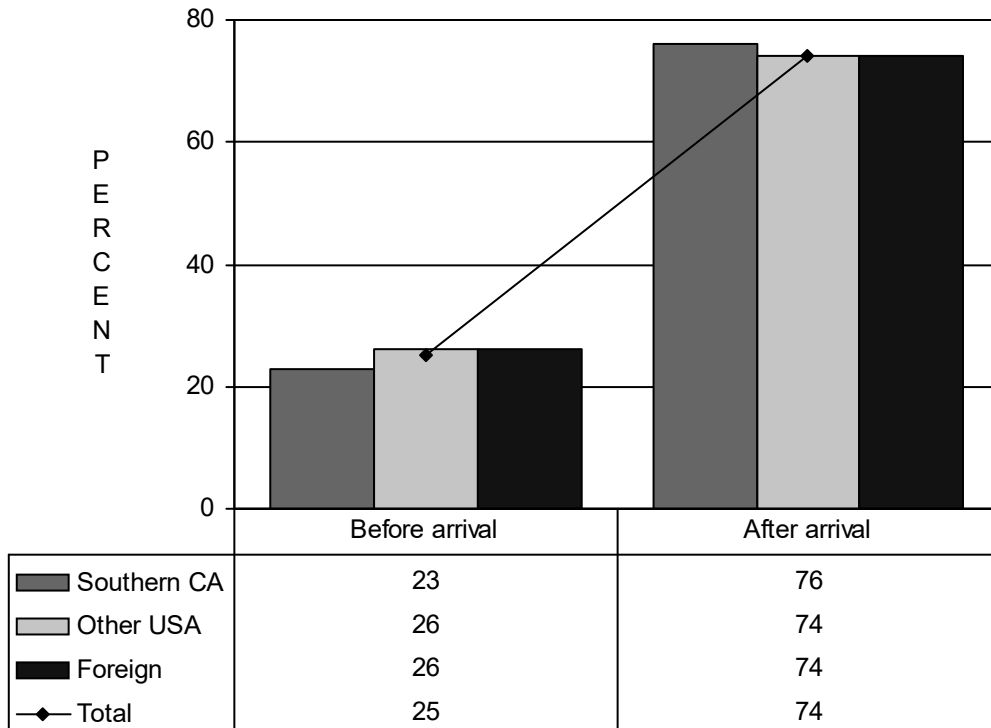


(Base Sizes: Southern CA=504, Other USA=1621, Foreign=551, TOTAL=2679)

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

* 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)

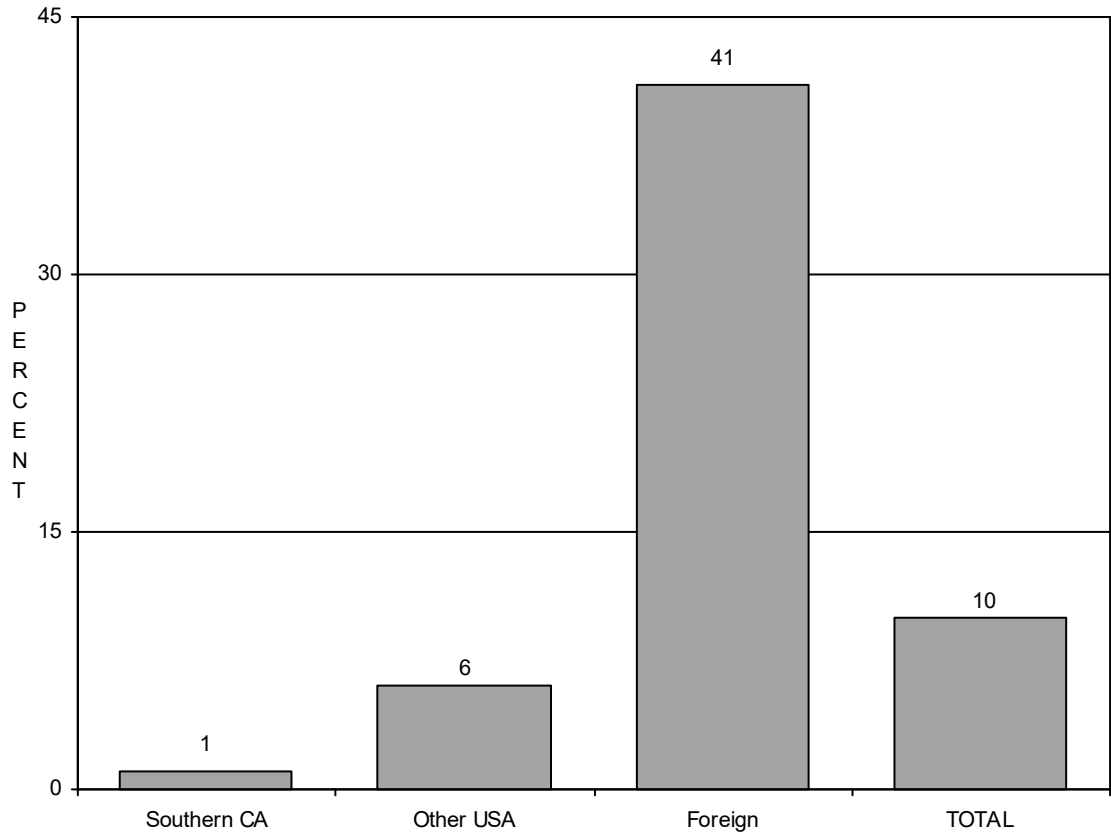


(Base Sizes: Southern CA=347, Other USA=1237, Foreign=508, TOTAL=2096)

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

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

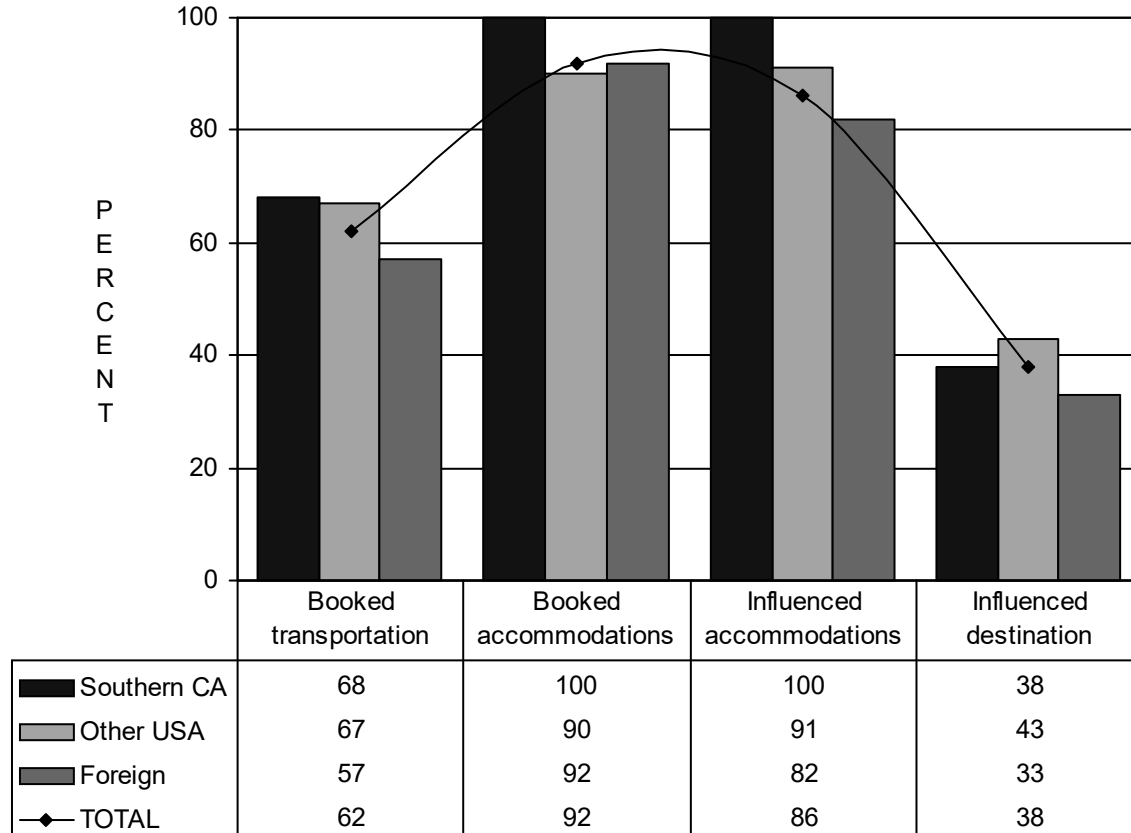
FIGURE 16
Travel Agent Assistance



Only "yes" responses are reported in this figure.

Foreign visitors (41%) were far more likely to have used a travel agent than other domestic visitors (6%), who in turn were more likely to have used a travel agent than visitors from Southern California (1%).

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

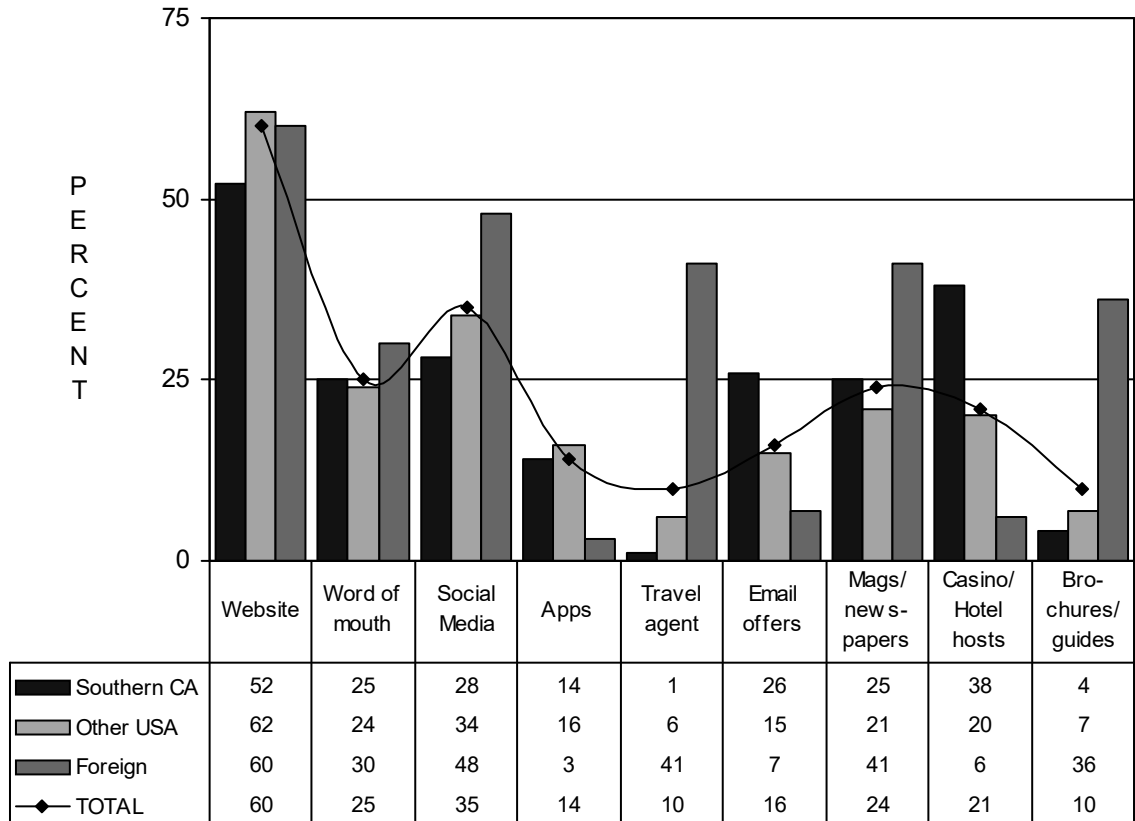


Multiple responses permitted
Caution small sample sizes
(Base Sizes: Southern CA=8*, Other USA=154, Foreign=205, TOTAL=367)

Among those visitors who used a travel agent to plan their trip to Las Vegas, six in ten (62%) said the travel agent booked their transportation, while nine in ten (92%) said the agent booked their accommodations and nearly nine in ten (86%) said the travel agent influenced their choice of accommodations. Domestic visitors from outside Southern California were more likely than foreign visitors to say the travel agent booked their transportation (67% vs. 57%) or influenced their choice of accommodations (91% vs. 82%).

* Note extremely small base size for Southern California visitors.

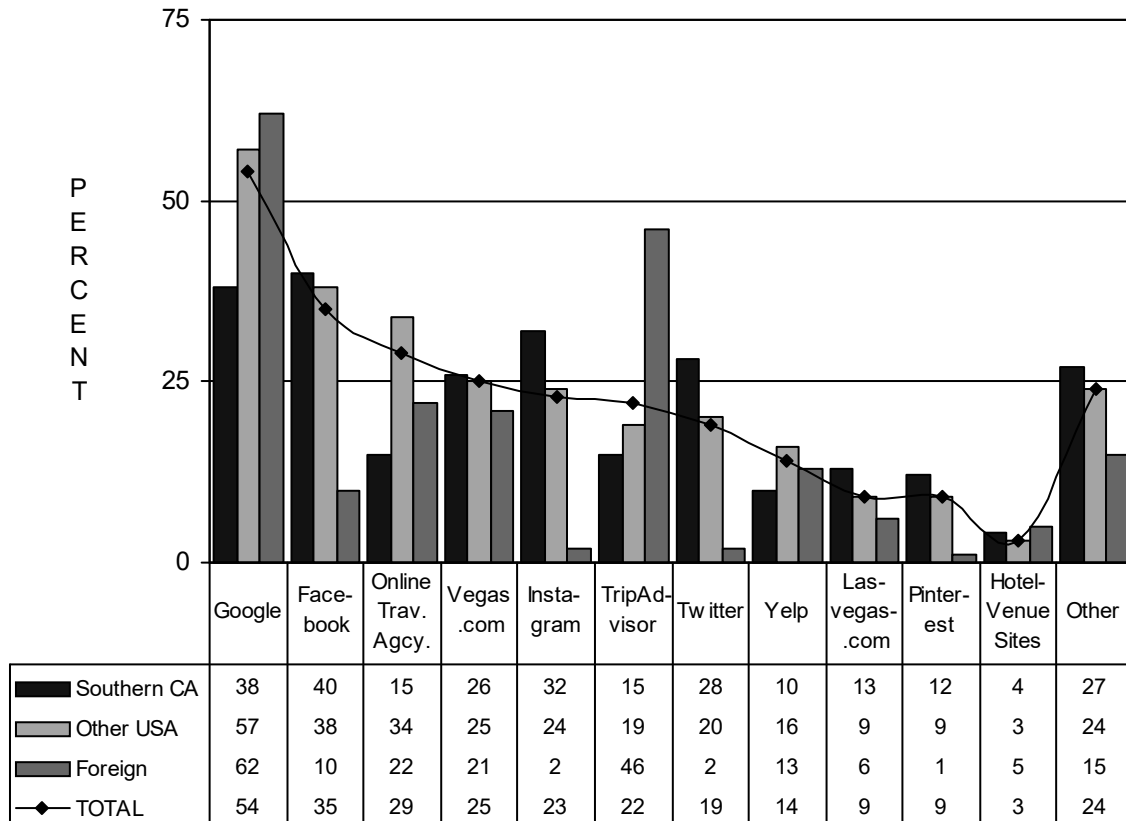
FIGURE 18
Tools Used In Planning Trip To Las Vegas



Multiple responses permitted

Visitors were asked what tools they used to plan their trip to Las Vegas. Over two-thirds said they used some type of online tool, either a website (60%), social media (35%), or an app (14%), while one-fourth (25%) said they relied on word of mouth. Other domestic visitors (72%) were more likely than Southern California visitors (59%) or foreign visitors (62%) to say they had used some type of online tool in planning their trip. Foreign visitors were the most likely segment to say they used social media (48%), a travel agent (41%), magazines or newspapers (41%), or printed brochures or travel guides (36%) in planning their trip to Las Vegas. Southern California visitors were the most likely segment to say they used casino/hotel hosts (38%) or email offers (26%) in planning their trip.

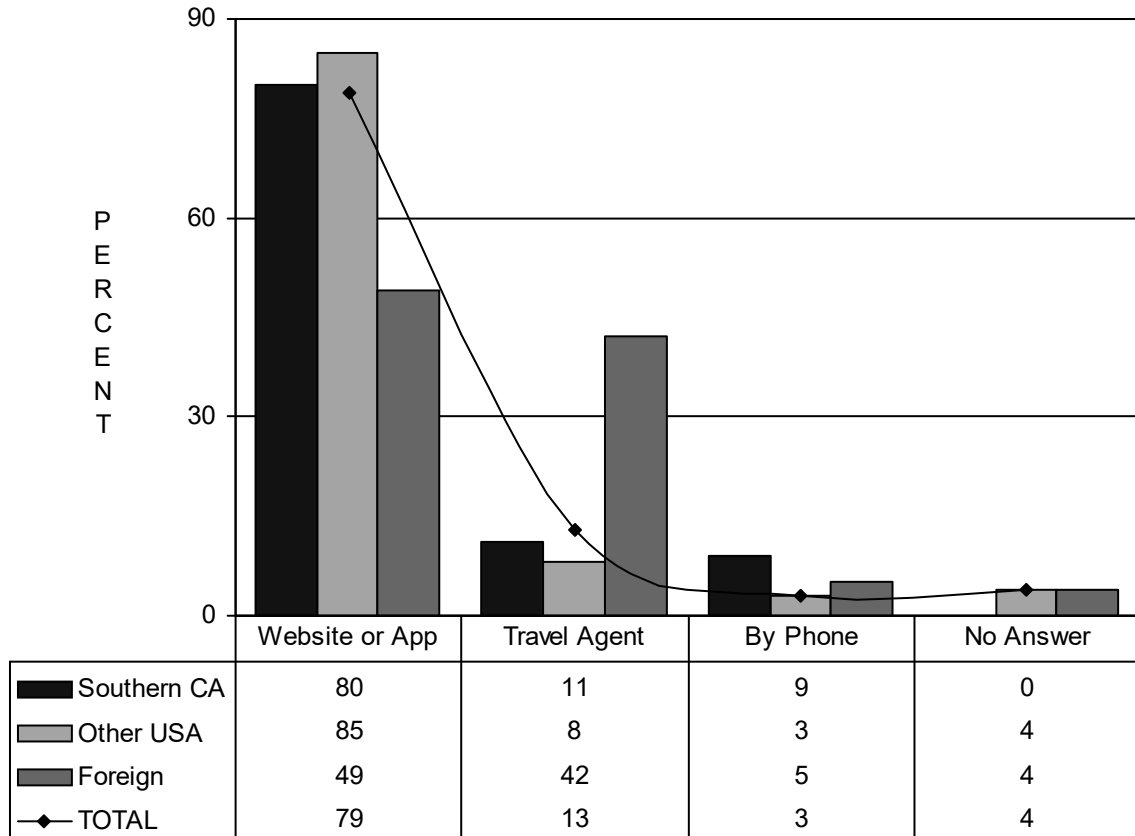
FIGURE 19
Social Media And Travel Review Apps Or Websites Used In Planning Trip To Las Vegas
(Among Those Who Used Websites, Social Media, Or Apps To Plan Trip)



Multiple responses permitted
(Base Sizes: Southern CA=390, Other USA=1762, Foreign=311, TOTAL=2464)

Visitors who said they used a website, social media, or apps in planning their trip (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 over one-third (35%) said they used Facebook, and three in ten (29%) consulted reviews at online travel agencies. Foreign visitors were the most likely segment to say they used TripAdvisor (46%). Southern California visitors were the most likely segment to say they used Instagram (32%) or Twitter (28%), while other domestic visitors were the most likely segment to say they consulted reviews at online travel agencies (34%).

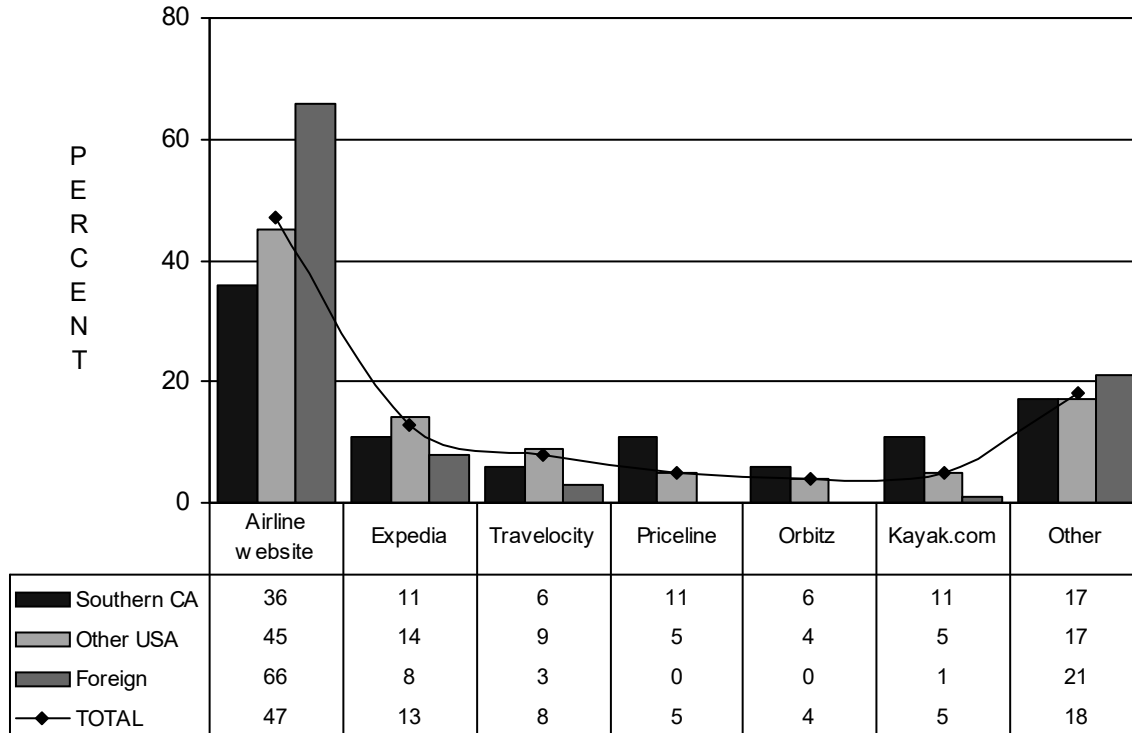
FIGURE 20
How Booked Flight To Las Vegas



(Base Sizes: Southern CA=51, Other USA=1414, Foreign=286, 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 or an app. Thirteen percent (13%) said they used a travel agent, and 3% said they booked their flight by phone. Southern California visitors (80%) and other domestic visitors (85%) were more likely than foreign visitors (49%) to say they booked their flight using a website or app. Foreign visitors (42%) were the most likely segment to say they used a travel agent to book their flight.

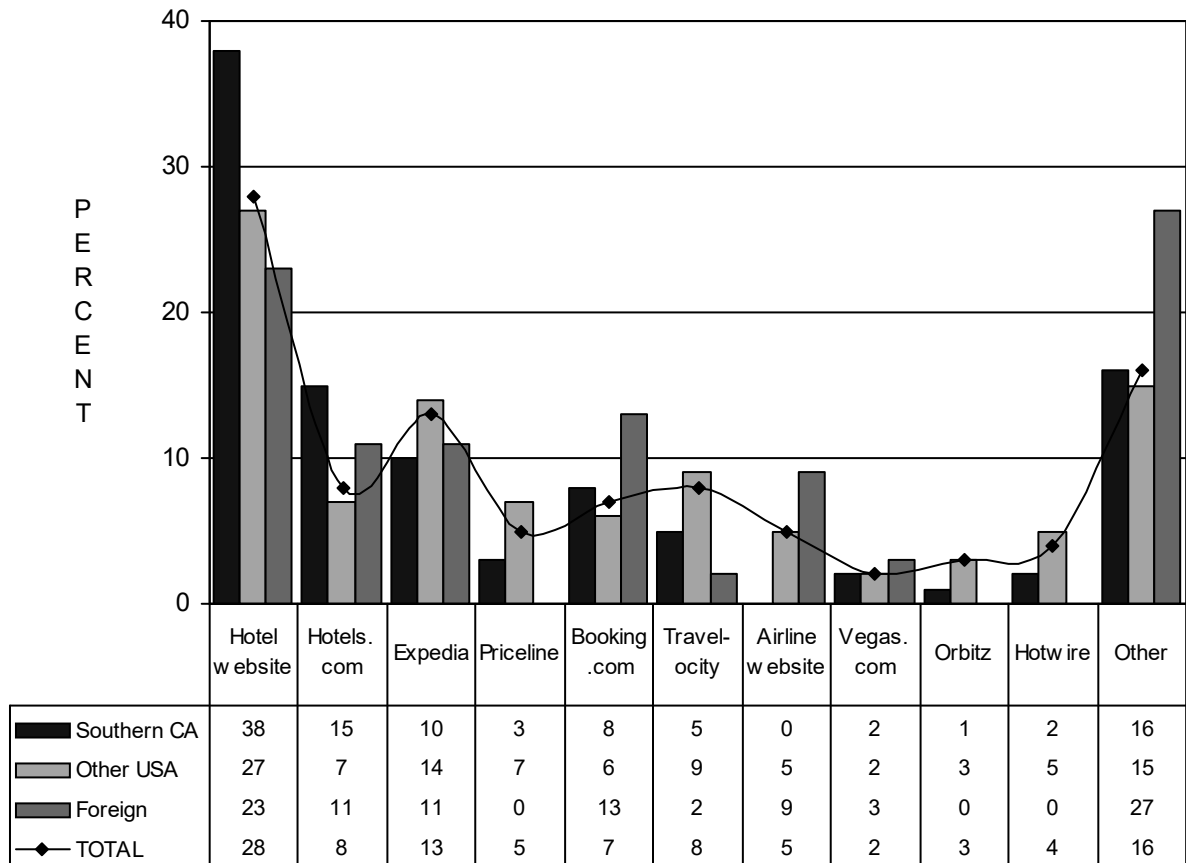
FIGURE 21
Website Or App Used To Book Flight
(Among Those Who Booked Their Flight To Las Vegas Online)



(Base Sizes: Southern CA=41, Other USA=1206, Foreign=141, TOTAL=1389)

Among those visitors who said they used a website or app to book their flight to Las Vegas, about one-half (47%) used an airline website. Thirteen percent (13%) used Expedia, while 8% used Travelocity and 5% each used either Kayak or Priceline. Foreign visitors (66%) were the most likely segment to have used an airline website and the least likely segment to have used Kayak (1%).

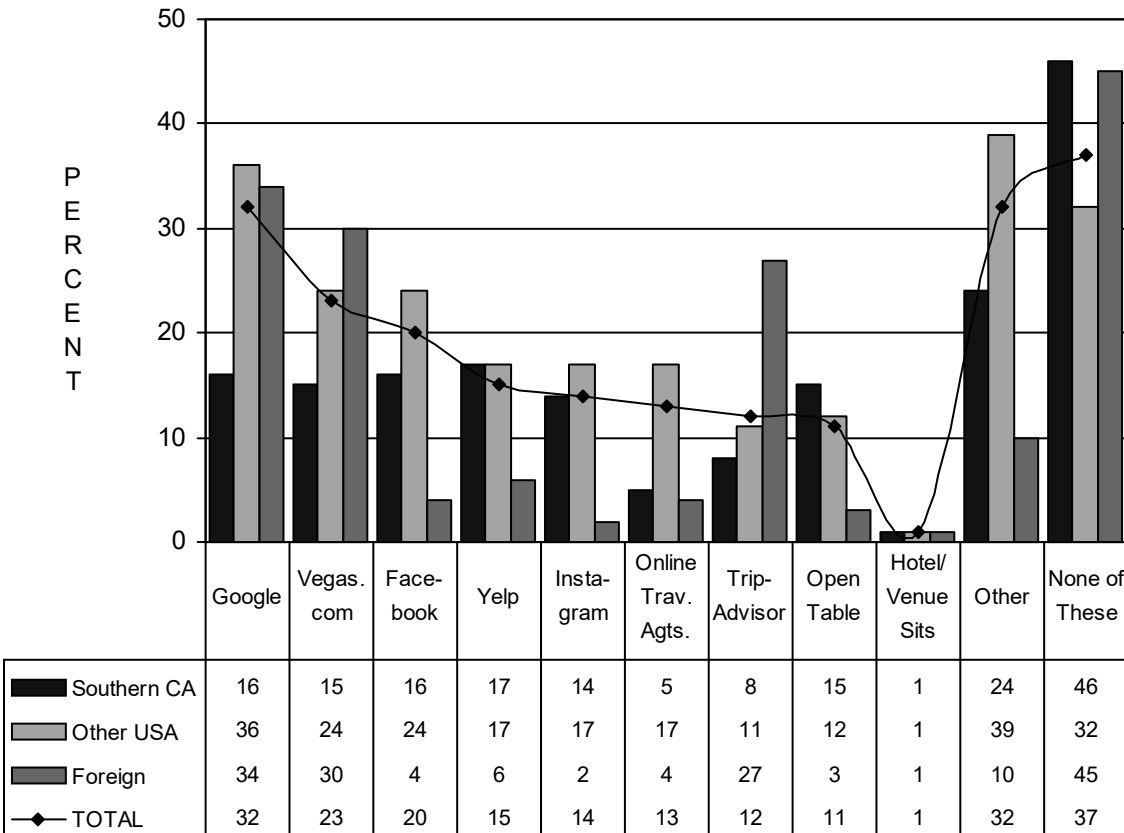
FIGURE 22
Website Or App Used To Book Accommodations
(Among Those Who Booked Their Accommodations Online)



(Base Sizes: Southern CA=255, Other USA=1344, Foreign=188, TOTAL=1788)

Southern California visitors (38%) were the most likely segment to have used a hotel website to book their accommodations, while other domestic visitors were the most likely segment to have used Travelocity (9%) or Hotwire (5%). Foreign visitors (9%) and other domestic visitors (5%) were more likely than Southern California visitors (less than 1%) to have used an airline website.

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

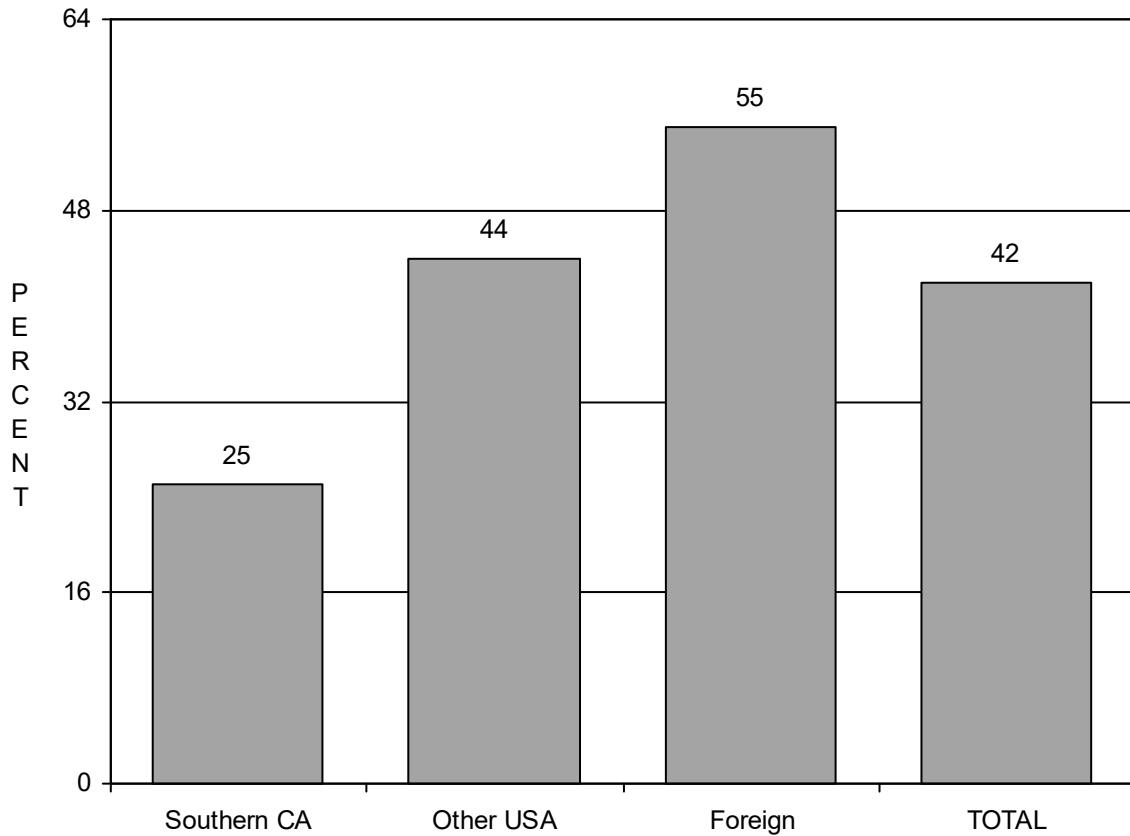


Multiple responses permitted

Visitors were asked whether they used social media apps or websites to plan their activities in Las Vegas and, if so, which ones. Nearly four in ten visitors (37%) said that they did not use social media apps or sites to plan their activities while in Las Vegas.

Foreign visitors were the most likely segment to have used Vegas.com (30%) and TripAdvisor (27%), and the least likely segment to have used Facebook (4%), Yelp (6%), Instagram (2%), or Open Table (3%). Other domestic visitors were the most likely segment to use Facebook (24%) or to have consulted reviews at online travel agencies (17%). Southern California visitors were the least likely segment to say they had used Google (16%) during their visit.

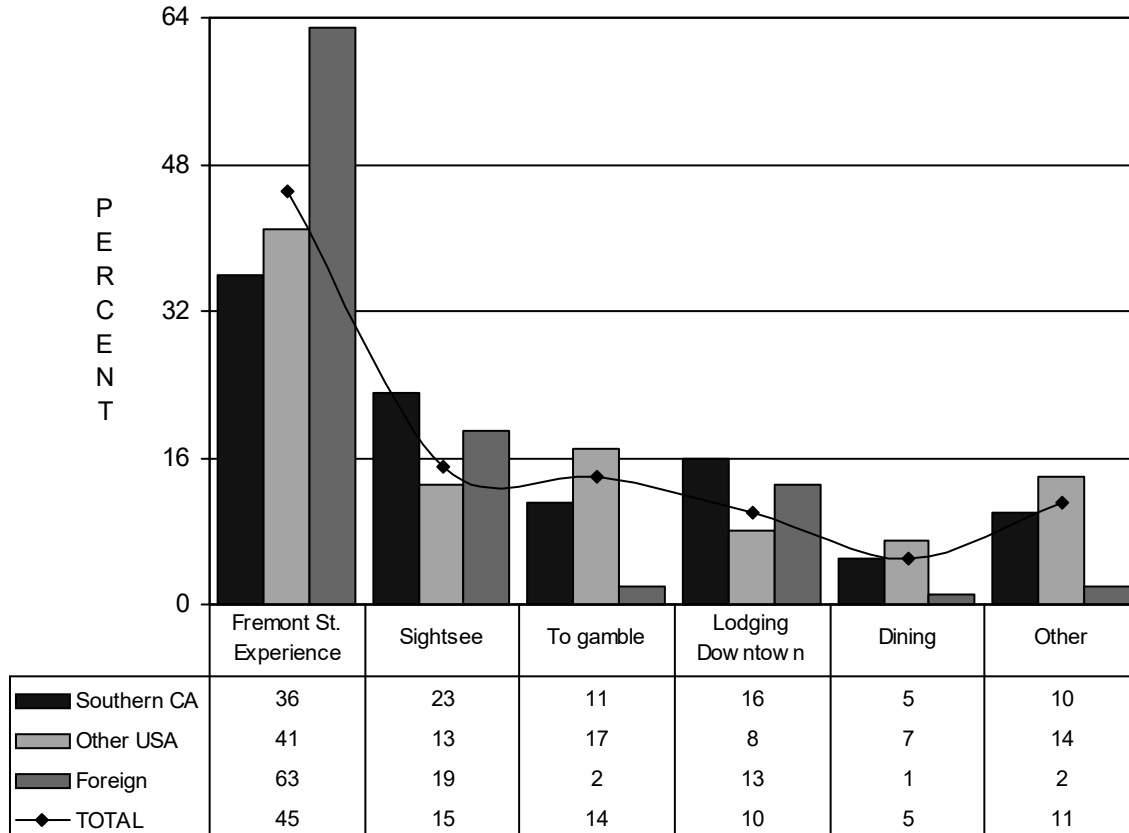
FIGURE 24
Whether Visited Downtown Las Vegas



Only "yes" responses are reported in this figure.

Visitors were asked whether they had visited Downtown Las Vegas. In 2019, about four in ten (42%) visitors said they had. Foreign visitors (55%) were the most likely segment to say they had visited Downtown and Southern California visitors were the least likely segment to say they had visited Downtown.

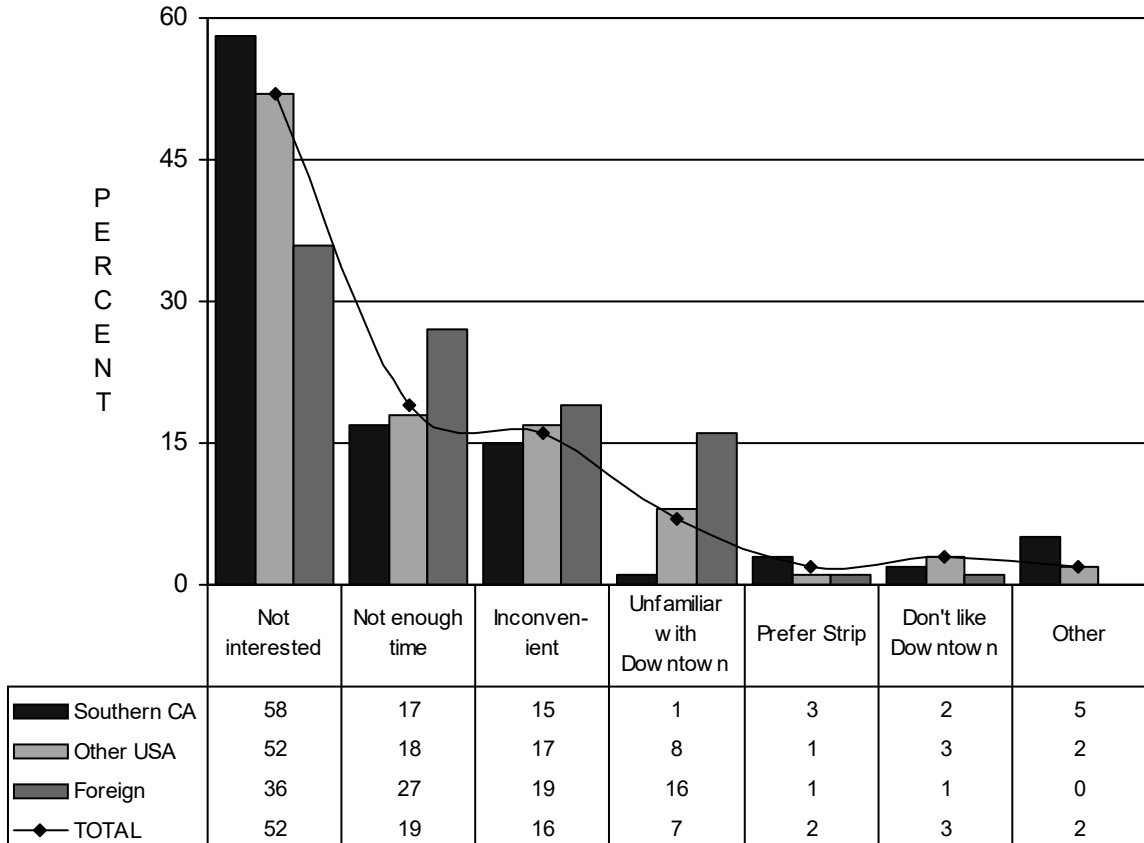
FIGURE 25
Main Reason For Visiting Downtown Las Vegas
(Among Those Who Visited Downtown)



(Base Sizes: Southern CA=166, Other USA=1063, Foreign=277, TOTAL=1506)

People who visited Downtown Las Vegas on their current trip were asked the primary reason why they had done so. Foreign visitors (63%) were the most likely segment to say they visited Downtown primarily to see the Fremont Street Experience and the least likely segment to say they visited Downtown primarily to gamble (2%).

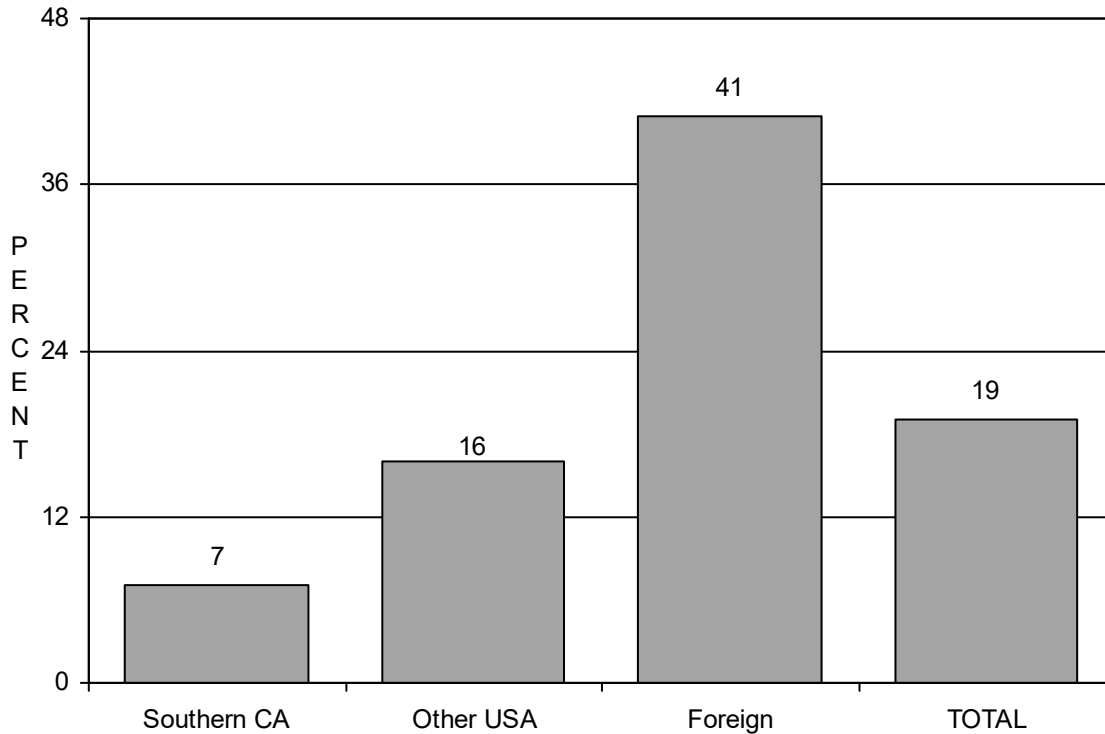
FIGURE 26
Main Reason For Not Visiting Downtown Las Vegas
(Among Those Who Did Not Visit Downtown)



(Base Sizes: Southern CA=493, Other USA=1372, Foreign=227, TOTAL=2092)

Visitors who did not visit Downtown were asked why they did not. Overall, about one-half (52%) of these visitors said they had no interest in or reason to go downtown and one-fifth (19%) said they didn't have enough time. Foreign visitors were the most likely segment to say they did not have enough time (27%) or to cite a lack of familiarity with the Downtown area (16%). They were the least likely segment to say they had no interest in visiting downtown (36%).

FIGURE 27
Visits To Nearby Places*

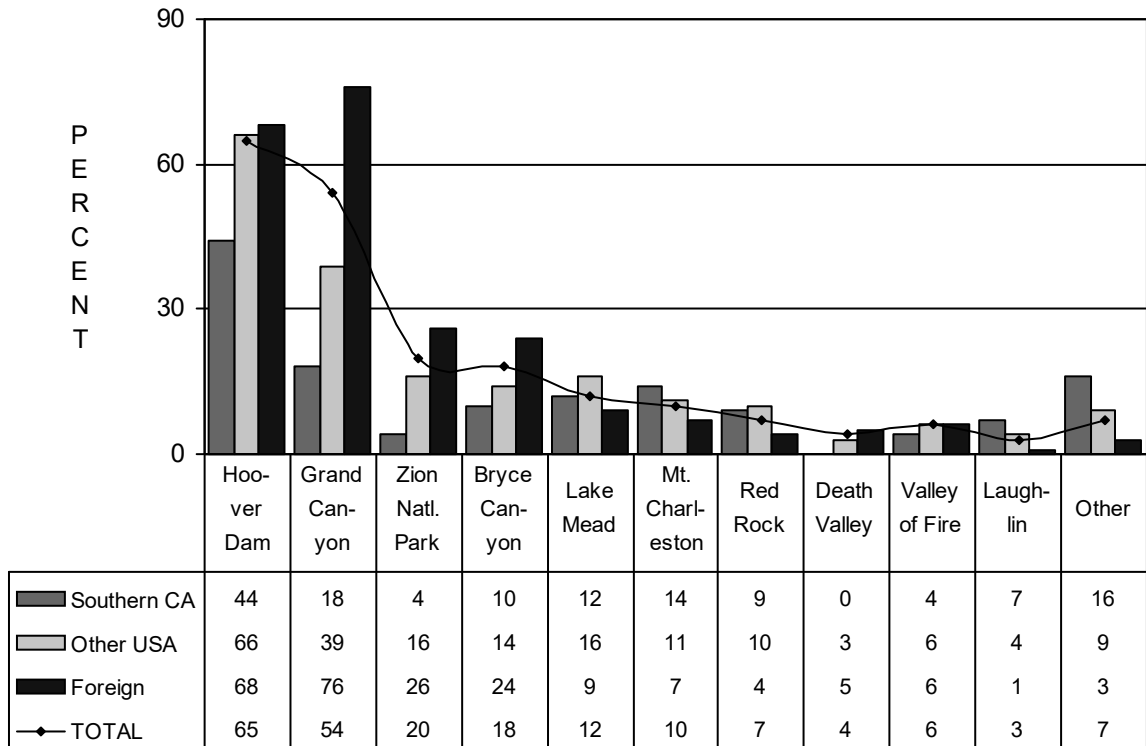


Only "yes" responses are reported in this figure.

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

* 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)



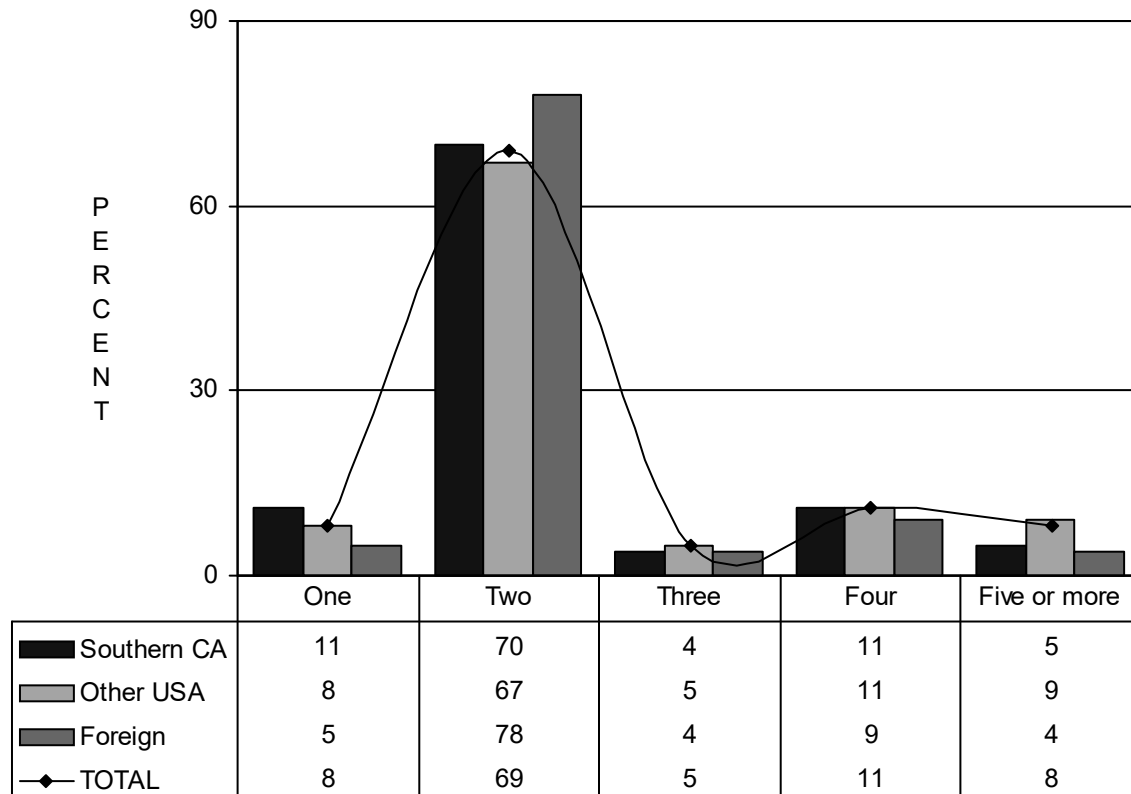
Multiple responses permitted.
(Base Sizes: Southern CA=48. Other USA=347. Foreign=298. TOTAL=694)

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

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

TRIP CHARACTERISTICS AND EXPENDITURES

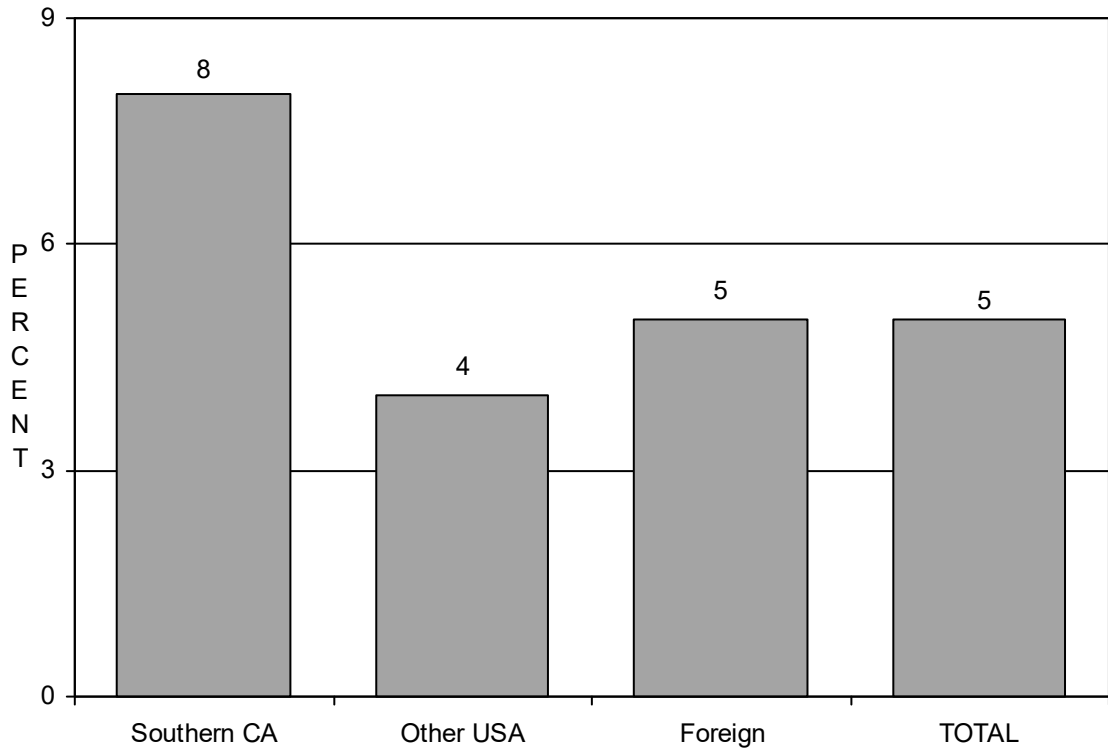
FIGURE 29
Adults In Immediate Party



(Means: Southern CA=2.4, Other USA=2.6, Foreign=2.4, TOTAL=2.5)

Seven in ten visitors (69%) traveled in parties of two and the average party size was 2.5. The average party size was the highest among other domestic visitors (2.6) than among either Southern California or foreign visitors (2.4 each). Southern California visitors (11%) and other domestic visitors (8%) were more likely than foreign visitors (5%) to say they were traveling alone, while foreign visitors were the most likely to have two adults in their party (78%). Other domestic visitors were also the most likely to be traveling in a party of five or more adults (9%).

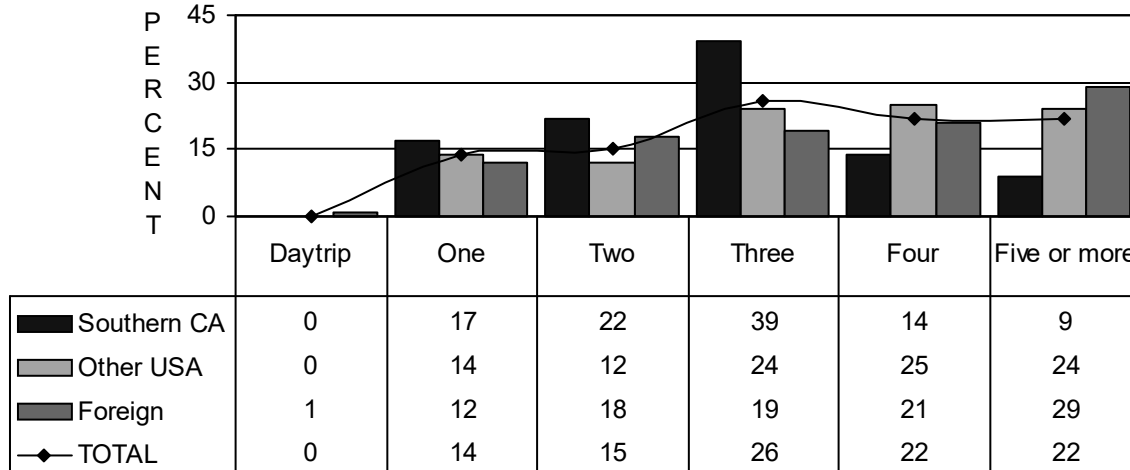
FIGURE 30
Whether Had Persons In Immediate Party Under Age 21
(Among All Visitors)



Only "yes" responses are reported in this figure.

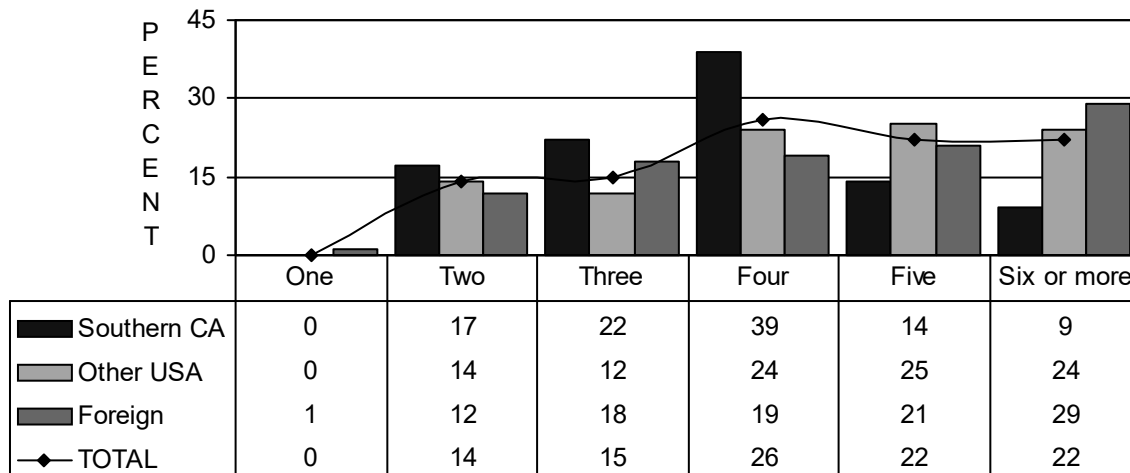
Five percent (5%) of all visitors said they were traveling with people under the age of 21 in their immediate party. Southern California visitors (8%) were more likely than other domestic visitors (4%) to be traveling with people under the age of 21.

FIGURE 31
Nights Stayed



(Means: Southern CA=2.8, Other USA=3.5, Foreign=3.6, TOTAL=3.4)

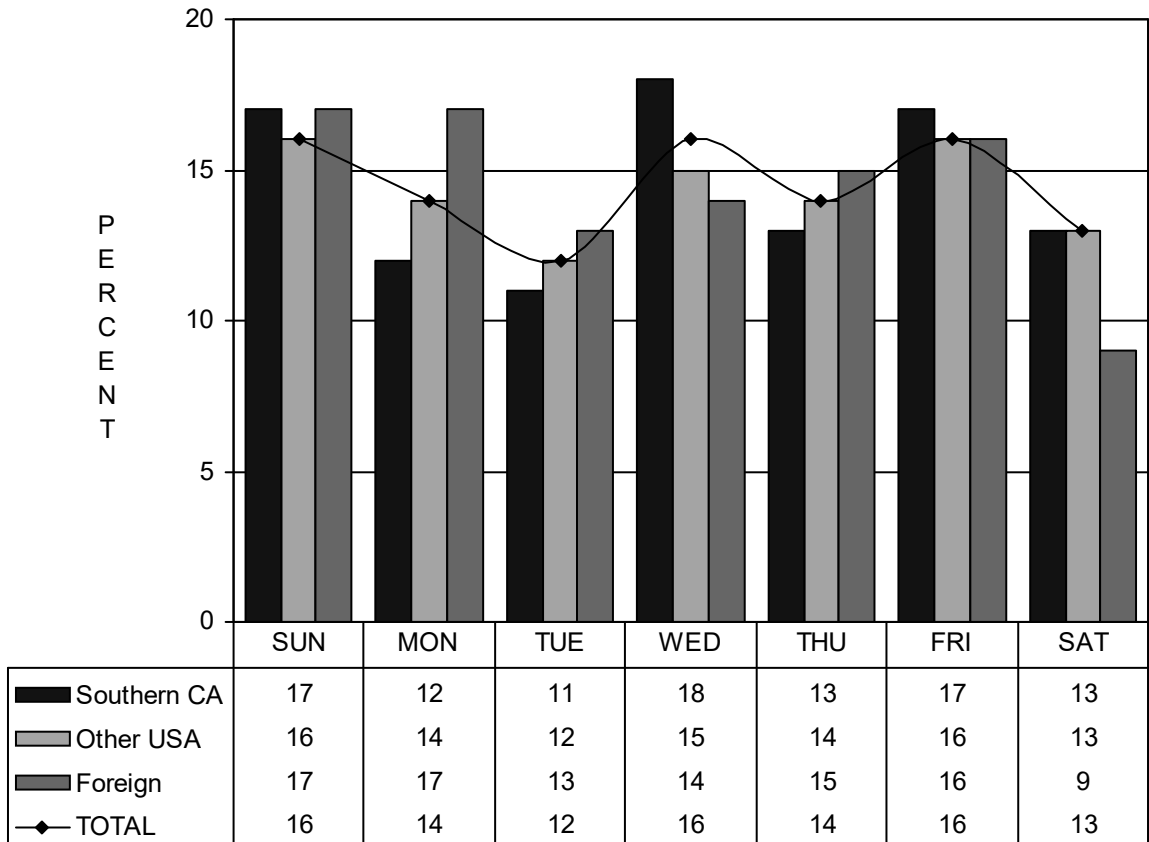
FIGURE 32
Days Stayed



(Means: Southern CA=3.8, Other USA=4.5, Foreign=4.6, TOTAL=4.4)

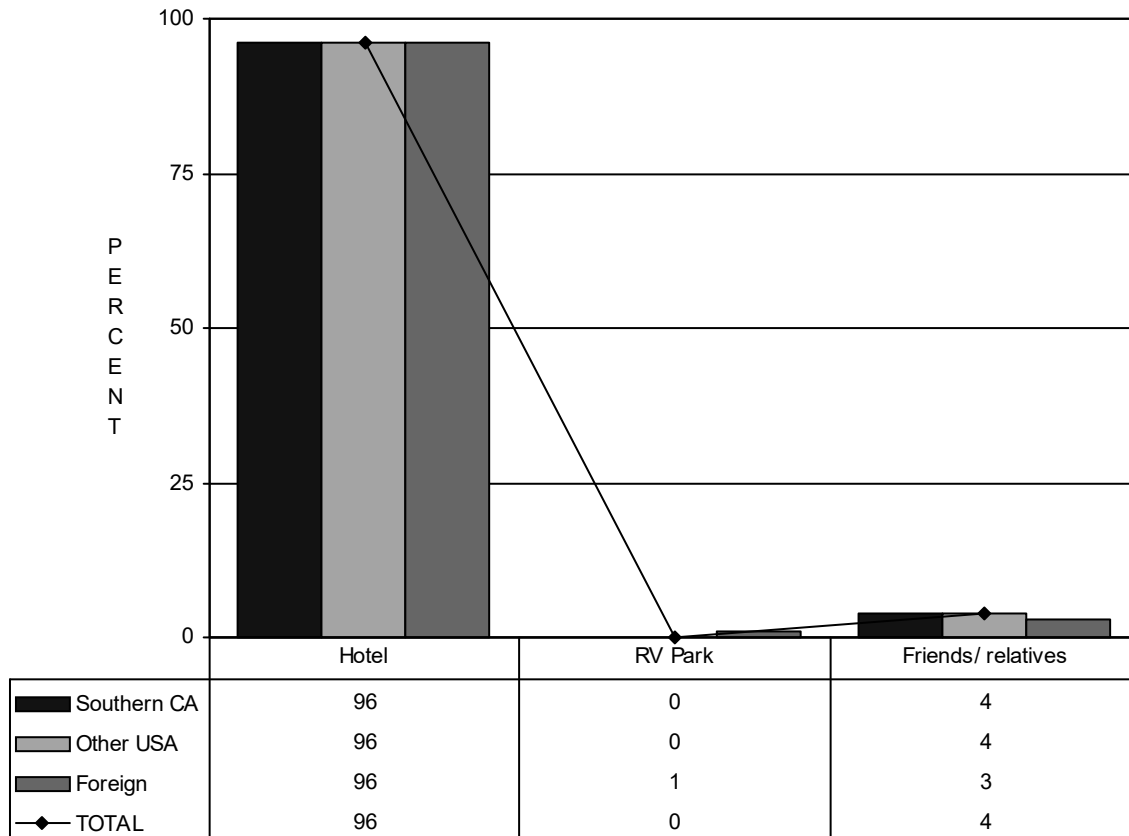
On average, both foreign visitors (3.6 nights and 4.6 days) and other domestic visitors (3.5 nights and 4.5 days) stayed longer in Las Vegas than Southern California visitors (2.8 nights and 3.8 days). Southern California visitors were the most likely segment to stay three nights and four days (39%).

FIGURE 33
Day Of Arrival



All respondents were asked on what day of the week they arrived in Las Vegas. There was very little difference in the profile of arrival days among these segments. However, other domestic visitors (13%) were more likely to arrive on a Saturday than foreign visitors (9%).

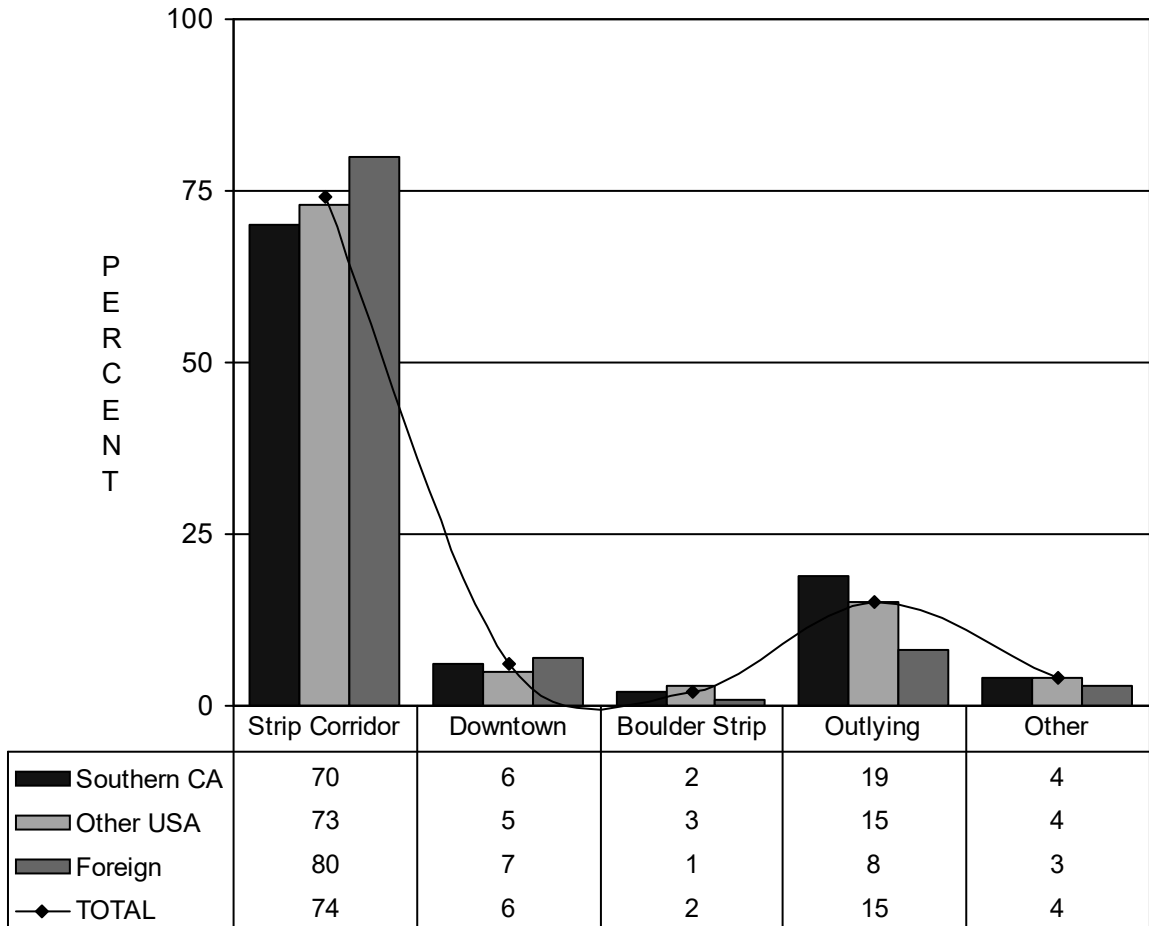
FIGURE 34
Type Of Lodging
(Among Those Who Stayed Overnight)



(Base Sizes: Southern CA=658, Other USA=2428, Foreign=501, TOTAL=3588)

Among those visitors who stayed overnight in Las Vegas, the vast majority (96%) stayed in a hotel. There were no statistically significant differences in the type of lodging among these segments.

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

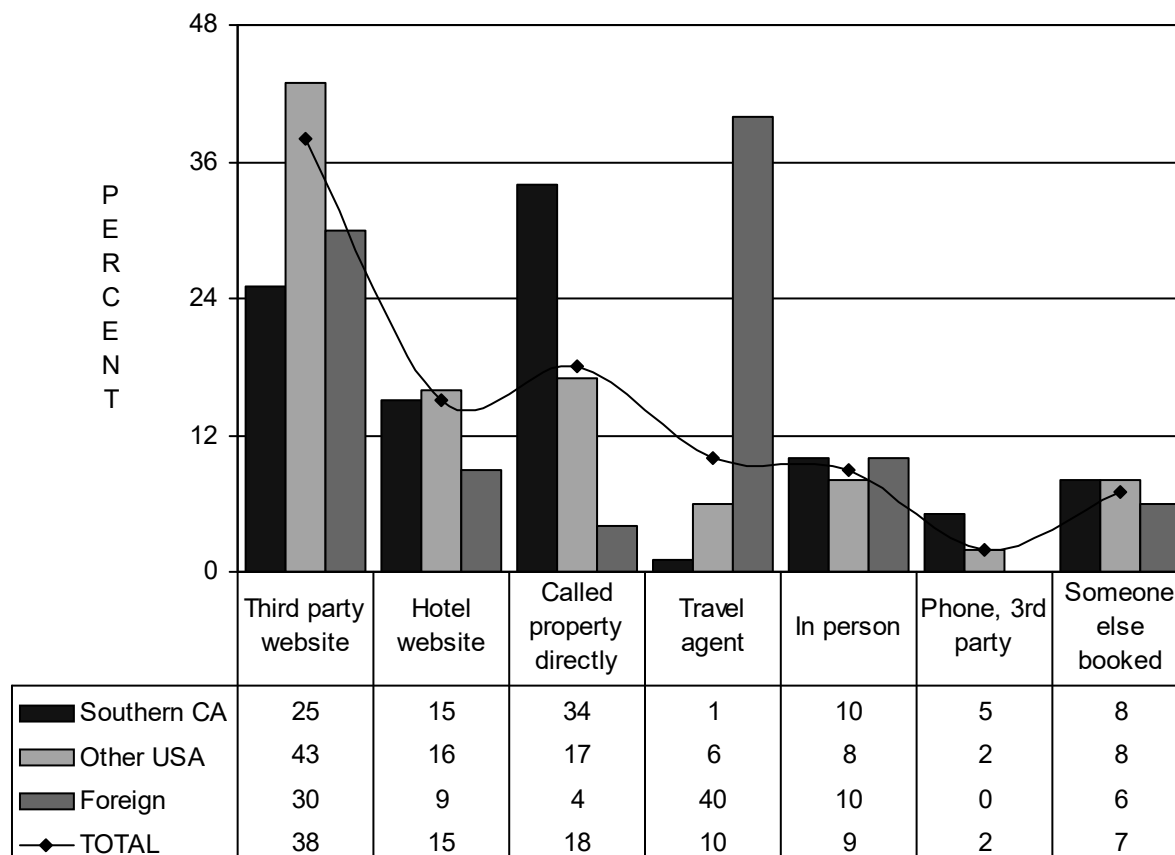


(Base Sizes: Southern CA=658, Other USA=2428, Foreign=501, TOTAL=3588)

Foreign visitors (80%) were far more likely to have stayed on the Strip Corridor* than other domestic visitors (73%) or Southern California visitors (70%). Foreign visitors (8%) were also the least likely segment to have stayed in outlying areas.

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

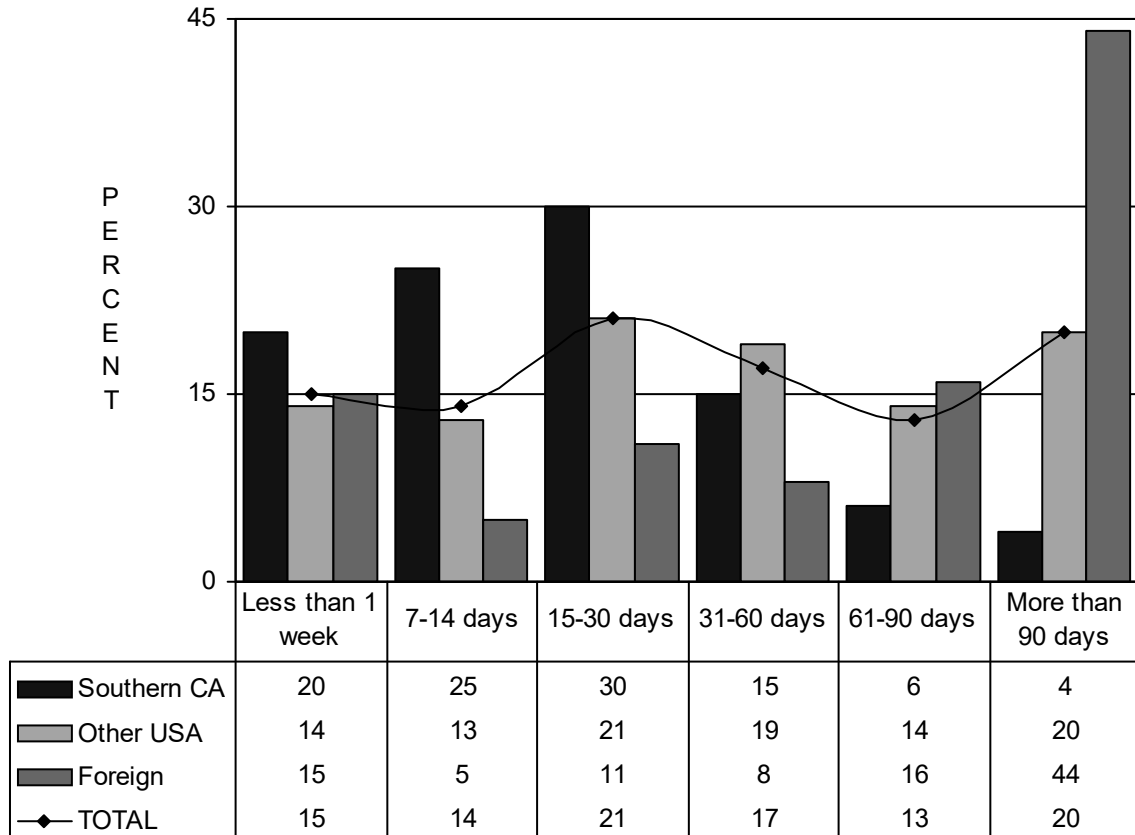
FIGURE 36
How Booked Accommodations In Las Vegas
(Among Those Who Stayed In A Hotel/RV Park)



(Base Sizes: Southern CA=630, Other USA=2300, Foreign=478, TOTAL=3409)

Visitors who stayed overnight were asked how they or someone in their party booked their accommodations in Las Vegas for their most recent trip. Other domestic visitors (43%) were more likely than Southern California visitors (25%) or foreign visitors (30%) to say they booked their accommodations through a third-party website, while Southern California visitors (15%) and other domestic visitors (16%) were more likely than foreign visitors (9%) to have booked their accommodations on a hotel website. Southern California visitors (34%) were the most likely segment to book their accommodations by calling the property directly, while foreign visitors (4%) were the least likely to have done so. Southern California visitors were also the most likely segment to book by phone through a third party (5%). Foreign visitors (40%) were more likely than other domestic visitors (6%) to have used a travel agent to book their accommodations, while Southern California visitors (1%) were the least likely.

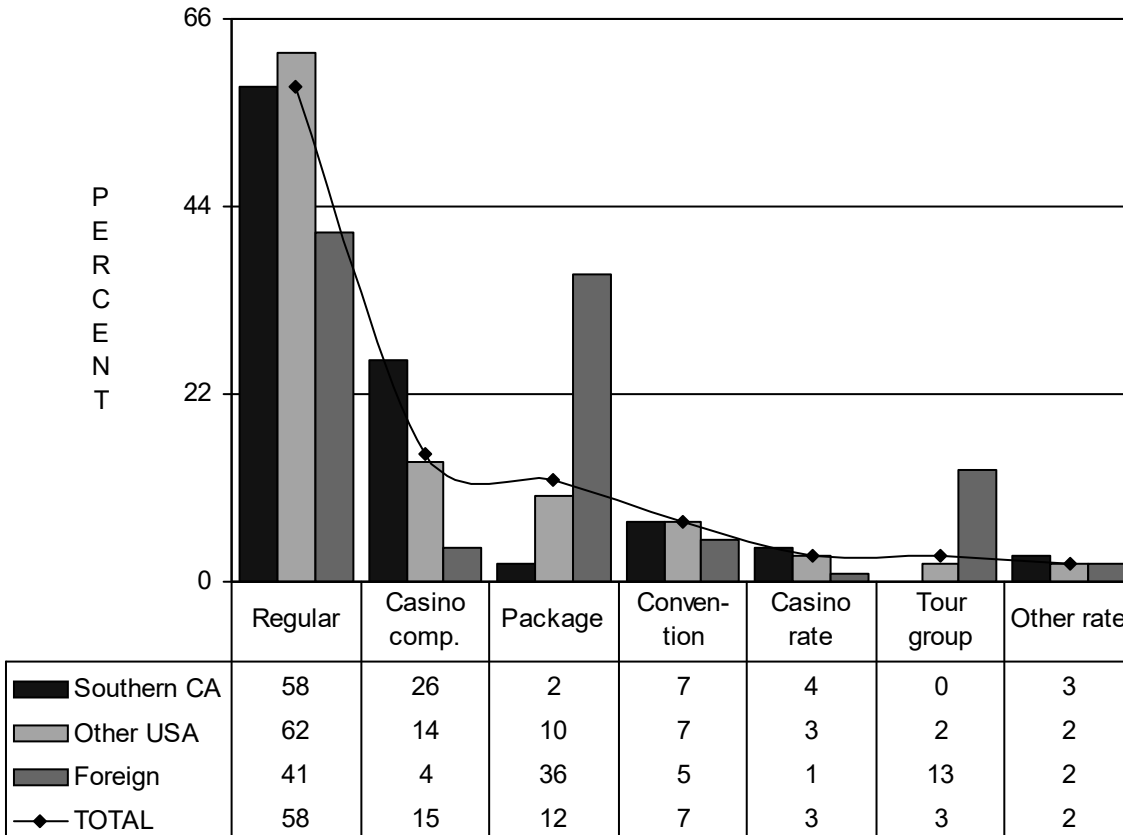
FIGURE 37
Advance Booking Of Accommodations
(Among Those Who Stayed In A Hotel/RV Park)



(Base Sizes: Southern CA=630, Other USA=2300, Foreign=478, TOTAL=3409)

Foreign visitors tended to book their accommodations the farthest in advance, followed by other domestic visitors, and finally by Southern California visitors. For example, foreign visitors (68%) were far more likely than other domestic visitors (53%) to book their accommodations more than a month in advance, while Southern California visitors (25%) were the least likely. Southern California visitors (55%) were more likely to book their lodging one week to one month in advance of their trip than other domestic visitors (34%), while foreign visitors (16%) were the least likely.

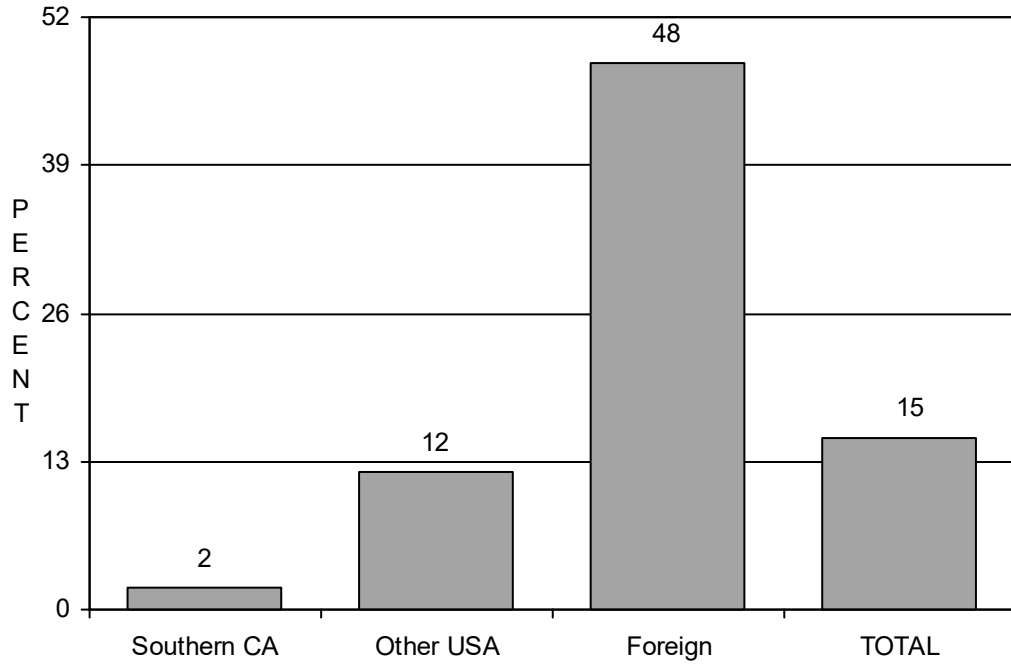
FIGURE 38
Type Of Room Rates
(Among Those Staying In A Hotel)



(Base Sizes: Southern CA=630, Other USA=2296, Foreign=473, TOTAL=3400)

Looking at the type of room rates received by hotel lodgers, Southern California visitors (26%) were the most likely segment to have received a casino complimentary room rate, followed by other domestic visitors (14%), and foreign visitors (4%). Foreign visitors (36%) were the most likely segment to have received a package rate, followed by other domestic visitors (10%), while Southern California visitors (2%) were the least likely. Foreign visitors were also the most likely segment to receive a tour group rate (13%) and the least likely segment to have paid a regular room rate (41%).

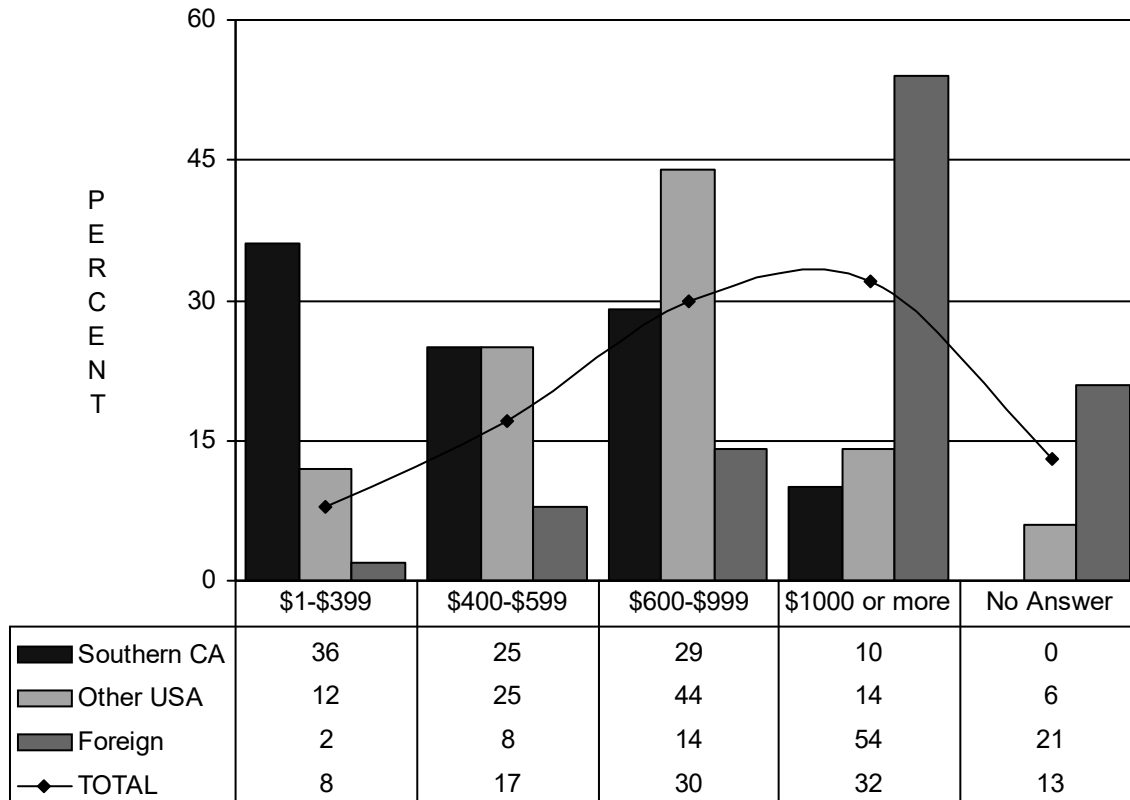
FIGURE 39
Package Purchasers
(Among Those Staying In A Hotel)



(Base Sizes: Southern CA=630, Other USA=2296, Foreign=473, TOTAL=3400)

Foreign visitors (48%) were the most likely — and Southern California visitors the least likely (2%) — to be visiting Las Vegas as part of a tour group or package deal.

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

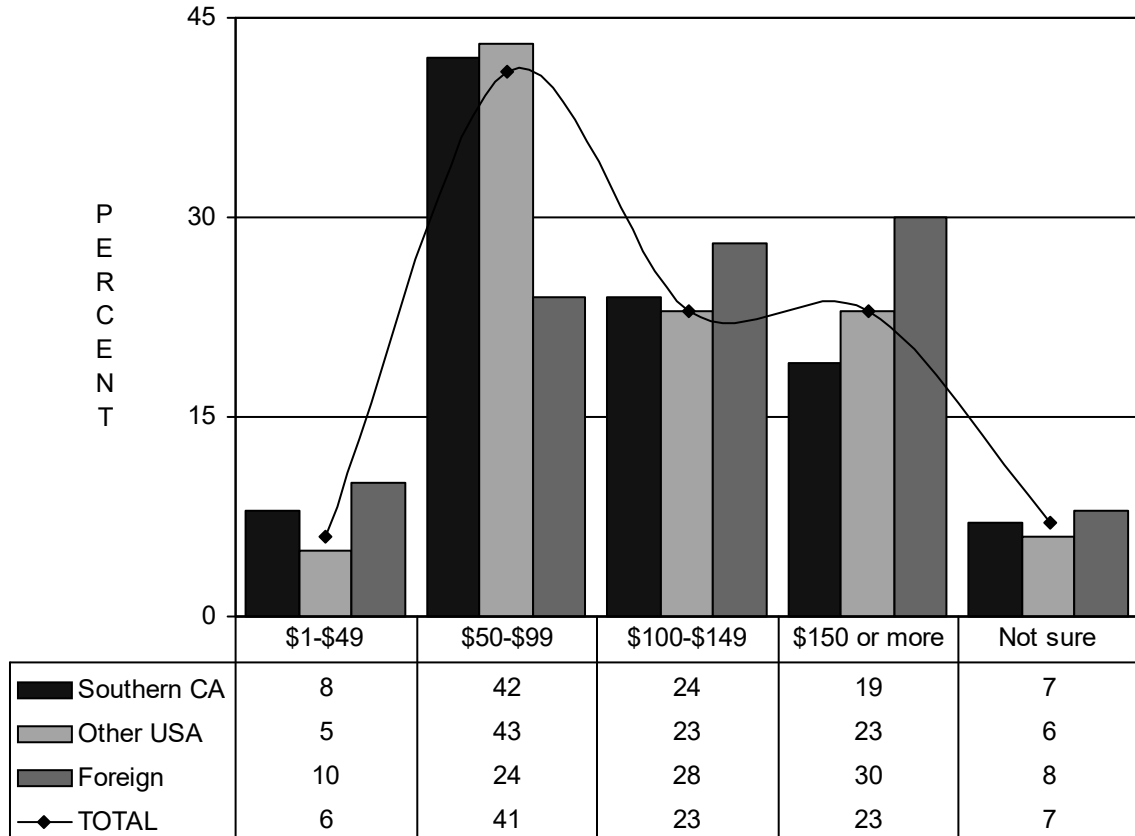


(Base Sizes: Southern CA=9*, Other USA=265, Foreign=229, TOTAL=604)
(Mean: Southern CA=\$608.22, Other USA=\$722.14, Foreign=\$1,365.13, TOTAL=\$983.73)

We asked those visitors who purchased either a hotel or airline, or a tour/travel group package, how much their package cost per person. Foreign visitors paid the most by far for their package (average of \$1,365.13), followed by other domestic visitors (\$722.14) and Southern California visitors (\$608.22). In fact, over one-half 54% of foreign visitors paid \$1,000 or more for their package, compared to 14% of other domestic visitors.

* Note extremely small base size for Southern California visitors.

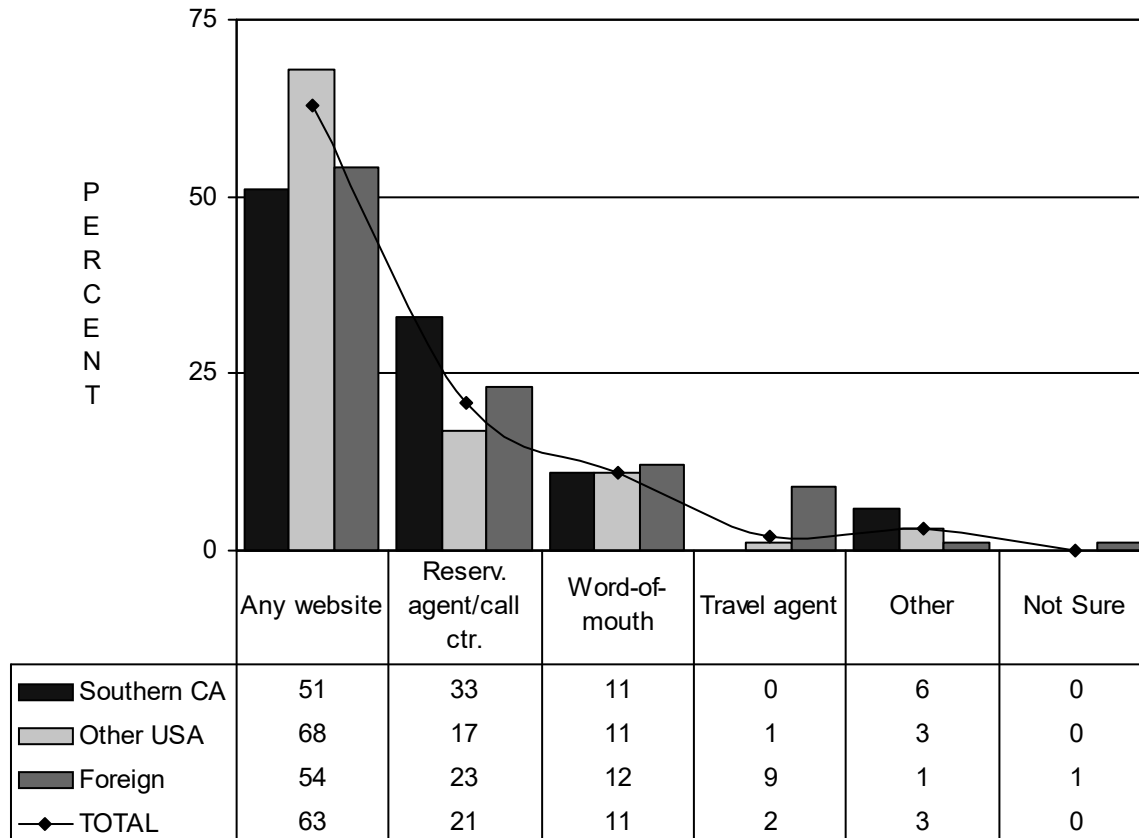
FIGURE 41
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel/Non-Package And Non -Comp)



(Base Sizes: Southern CA=455, Other USA=1712, Foreign=228, TOTAL=2394)
(Means: Southern CA=\$105.95, Other USA=\$114.91, Foreign=\$127.15, 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 per night cost for lodging was \$114.37. Foreign visitors (mean of \$127.15) spent more on average for their lodging than other domestic visitors (\$114.91) and Southern California visitors (\$105.95).

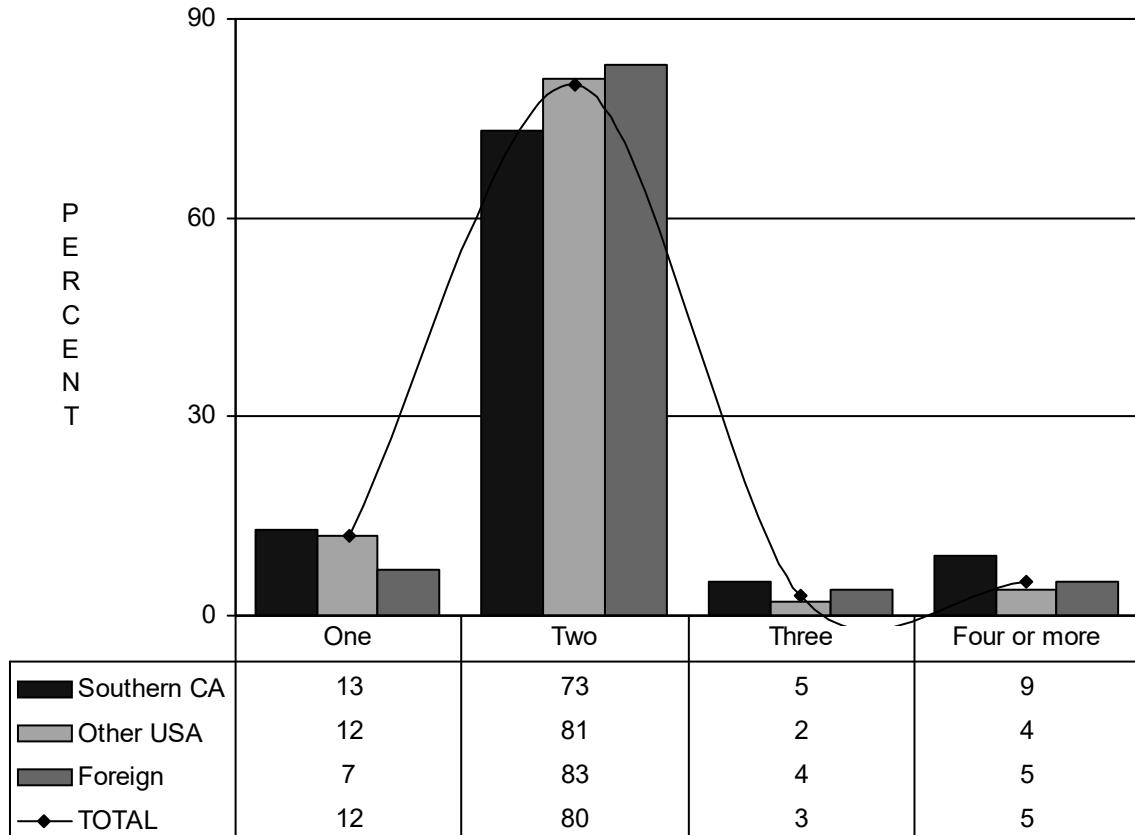
FIGURE 42
How First Found Out About Room Rate
(Among Those Staying In A Hotel/Non-Package)



(Base Sizes: Southern CA=455, Other USA=1712, Foreign=228, TOTAL=2394)

Visitors were asked how they first found out about the room rate they paid. Foreign visitors (9%) were the most likely segment to say they heard about the rate from a travel agent. Southern California visitors (33%) were the most likely segment to say they first heard about the rate from a reservation agent. Other domestic visitors (68%) were the most likely segment to say they first learned about the rate from a website.

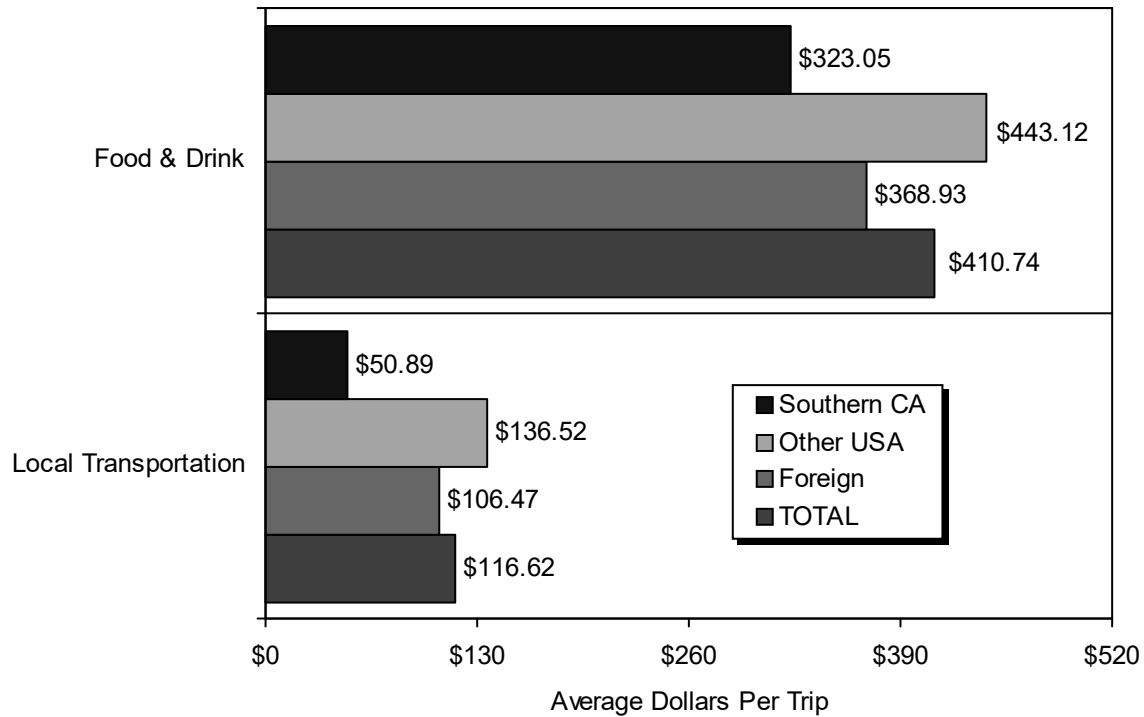
FIGURE 43
Number Of Room Occupants
(Among Those Staying In A Hotel)



(Base Sizes: Southern CA=633, Other USA=2327, Foreign=479, TOTAL=3440)
(Means: Southern CA=2.1, Other USA=2.0, Foreign=2.1, TOTAL=2.0)

The majority of visitors who stayed overnight in a hotel (80%) said two people stayed in their room. Southern California visitors (9%) were the most likely to say four or more people stayed in their room. Foreign visitors (7%) were the least likely to say they roomed alone. The average number of room occupants among all lodgers was 2.0. The average number of room occupants among Southern California visitors and foreign visitors (2.1 each), was higher than among other domestic visitors (2.0).

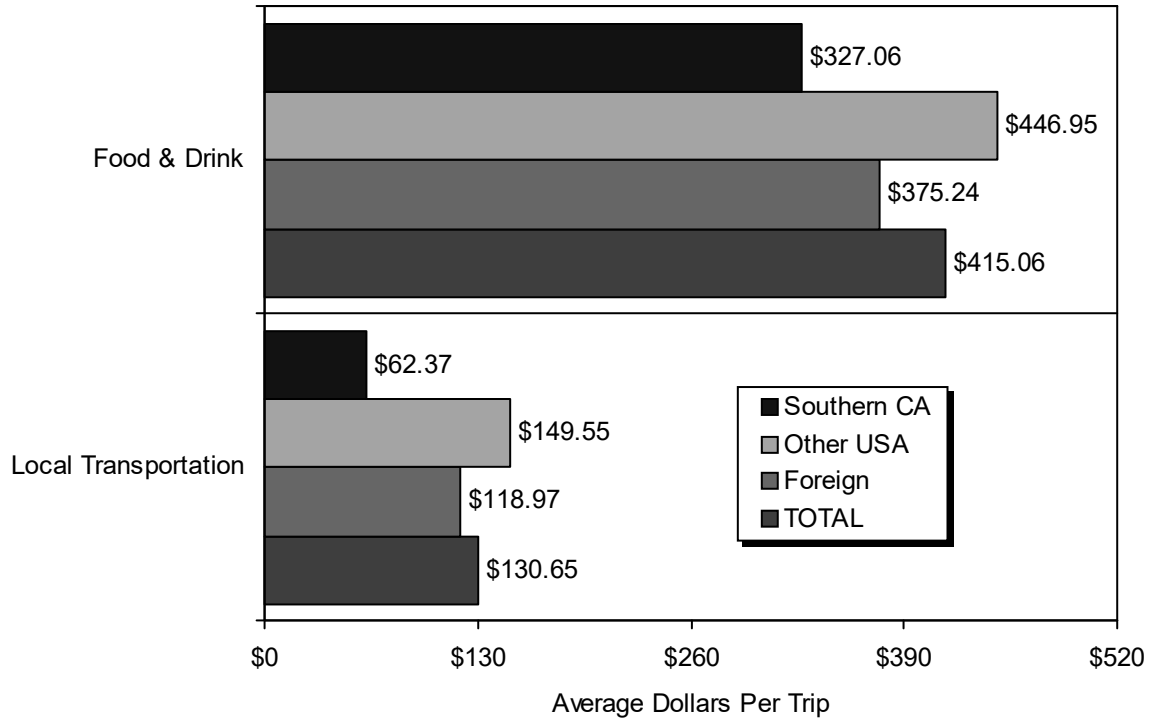
FIGURE 44
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Including Visitors Who Spent Nothing In That Category)



On average other domestic visitors (\$443.12) spent more on food and drink than other foreign visitors (\$368.93) and Southern California visitors (\$323.05).

Similarly, other domestic visitors (\$136.52) spent the most on local transportation, followed by foreign visitors (\$106.47), while Southern California visitors (\$50.89) spent the least.

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

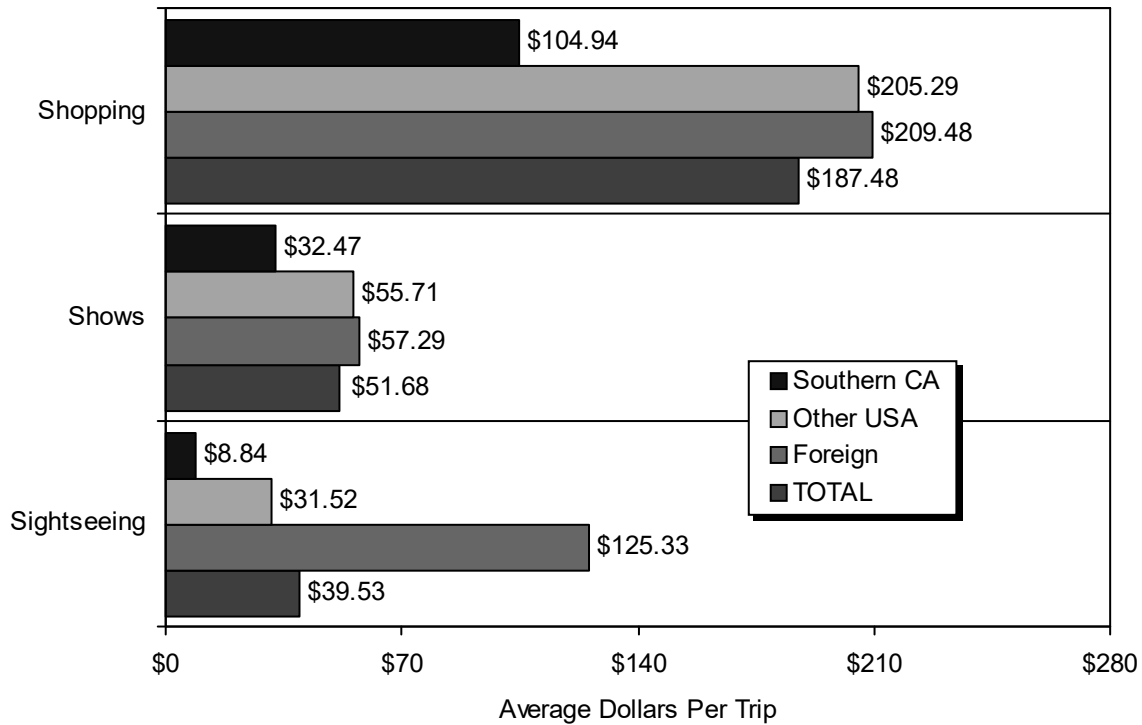


(Base Sizes, Food & Drink: Southern CA=650, Other USA=2415, Foreign=496, TOTAL=3562)
(Base Sizes, Local Transportation: Southern CA=537, Other USA=2225, Foreign=452, TOTAL=3214)

Among visitors who actually spent money on food and drink we observed the same pattern. On average, other domestic visitors (\$446.95) spent more than foreign visitors (\$375.24) and Southern California visitors (\$327.06) spent less than both groups.

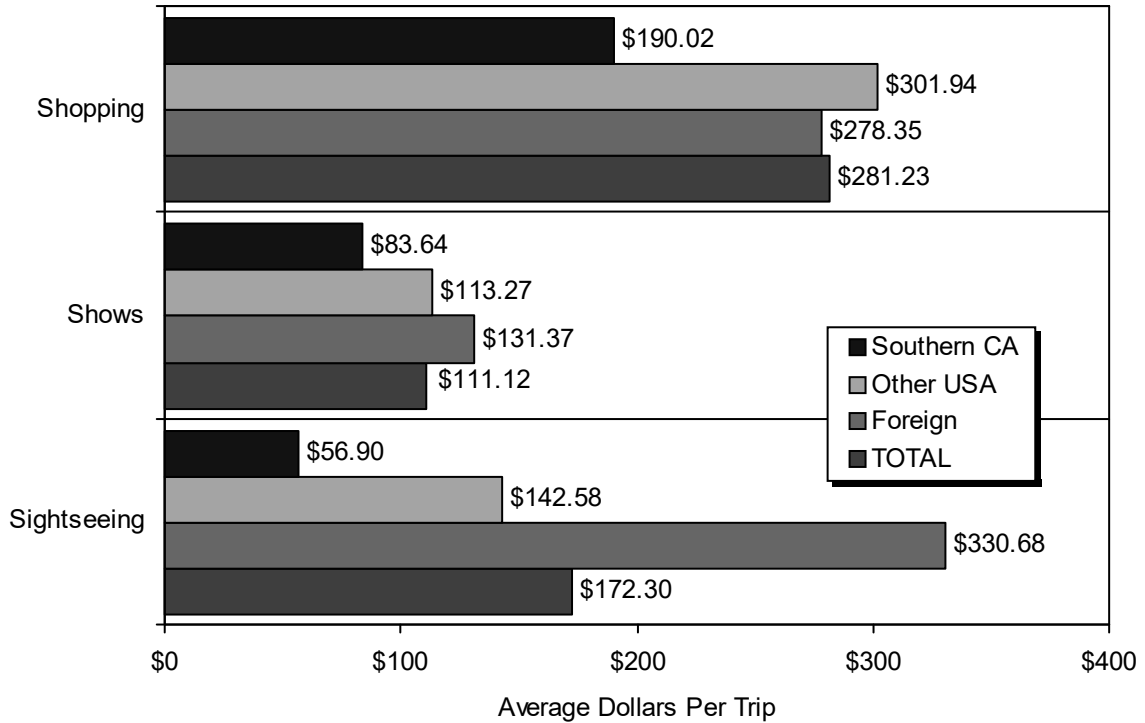
On average, among visitors who used local transportation, other domestic visitors (\$149.55) spent more than foreign visitors (\$118.97), while Southern California visitors (\$62.37) spent the least.

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



On average, Southern California visitors spent the least on shopping (\$104.94) and on shows/entertainment (\$32.47), while other domestic visitors and foreign visitors spent about the same amount in each of these spending categories. In terms of sightseeing, foreign visitors (\$125.33) spent more than other domestic visitors (\$31.52), while Southern California visitors (\$8.84) spent the least.

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

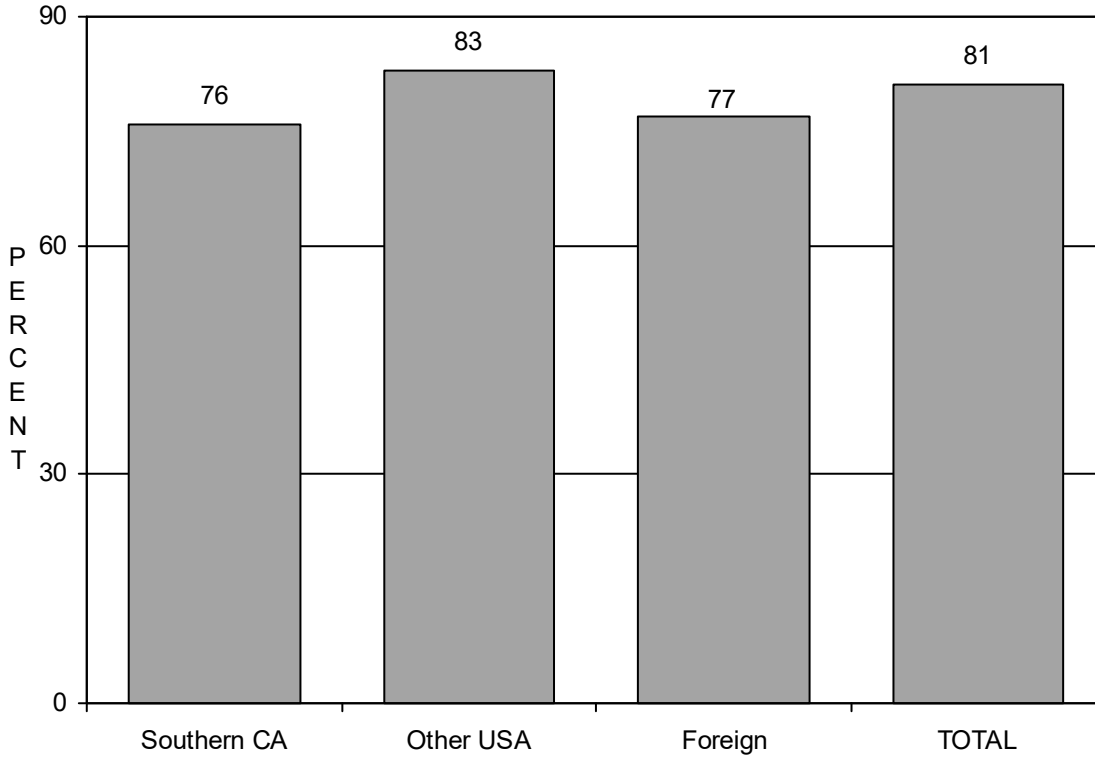


(Base Sizes, Shopping: Southern CA=363, Other USA=1658, Foreign=380, TOTAL=2402)
 (Base Sizes, Shows: Southern CA=255, Other USA=1199, Foreign=220, TOTAL=1676)
 (Base Sizes, Sightseeing: Southern CA=103, Other USA=571, Foreign=219, TOTAL=894)

The above figure shows average expenditures on shopping, shows/entertainment, and sightseeing during the entire visit to Las Vegas among visitors who spent money in each category. Southern California visitors (\$190.02) spent the least on shopping. Foreign visitors (\$131.37) spent more on shows/entertainment than other domestic visitors (\$113.27), while Southern California visitors (\$83.64) spent the least. In terms of sightseeing, foreign visitors (\$330.68) also spent more than other domestic visitors (\$142.58), while Southern California visitors (\$56.90) spent the least.

GAMING BEHAVIOR AND BUDGETS

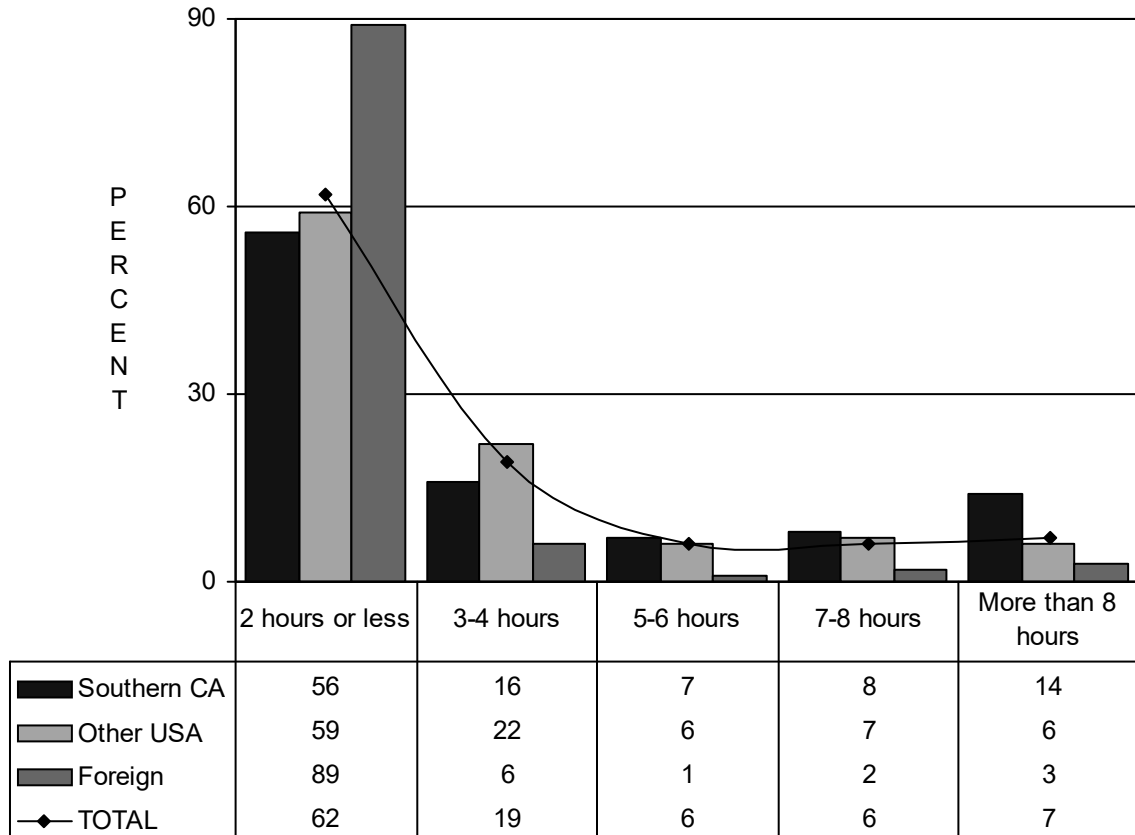
FIGURE 48
Whether Gambled While In Las Vegas



Only "yes" responses are reported in this figure.

Eight in ten (81%) visitors gambled while staying in Las Vegas. Other domestic visitors (83%) were the most likely to say they gambled.

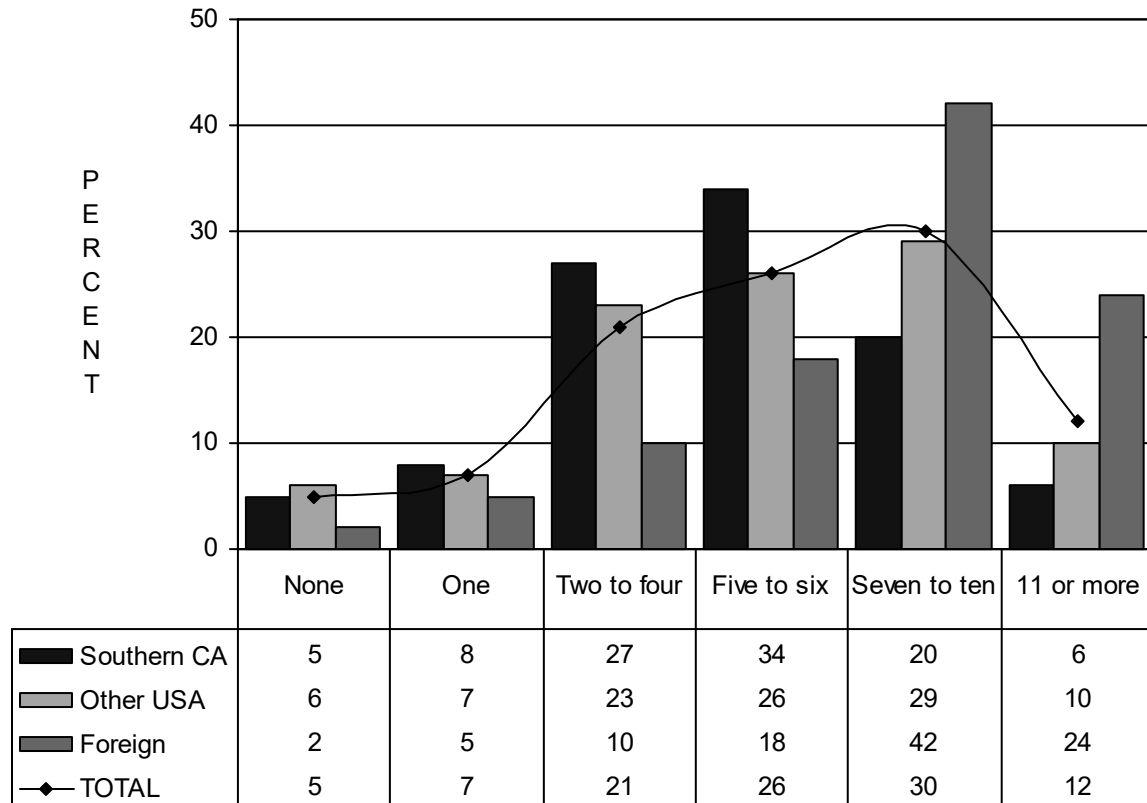
FIGURE 49
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



(Base Sizes: Southern CA=502, Other USA=2012, Foreign=389, TOTAL=2902)
(Means: Southern CA=3.6, Other USA=2.8, Foreign=0.9, TOTAL=2.7)

Among those visitors who said they gambled on their current trip to Las Vegas, on average Southern California visitors (3.6 hours) spent the most hours per day gambling, followed by other domestic visitors (2.8 hours), and foreign visitors (0.9 hours), who spent the least amount of time gambling.

FIGURE 50
Number Of Casinos Visited*

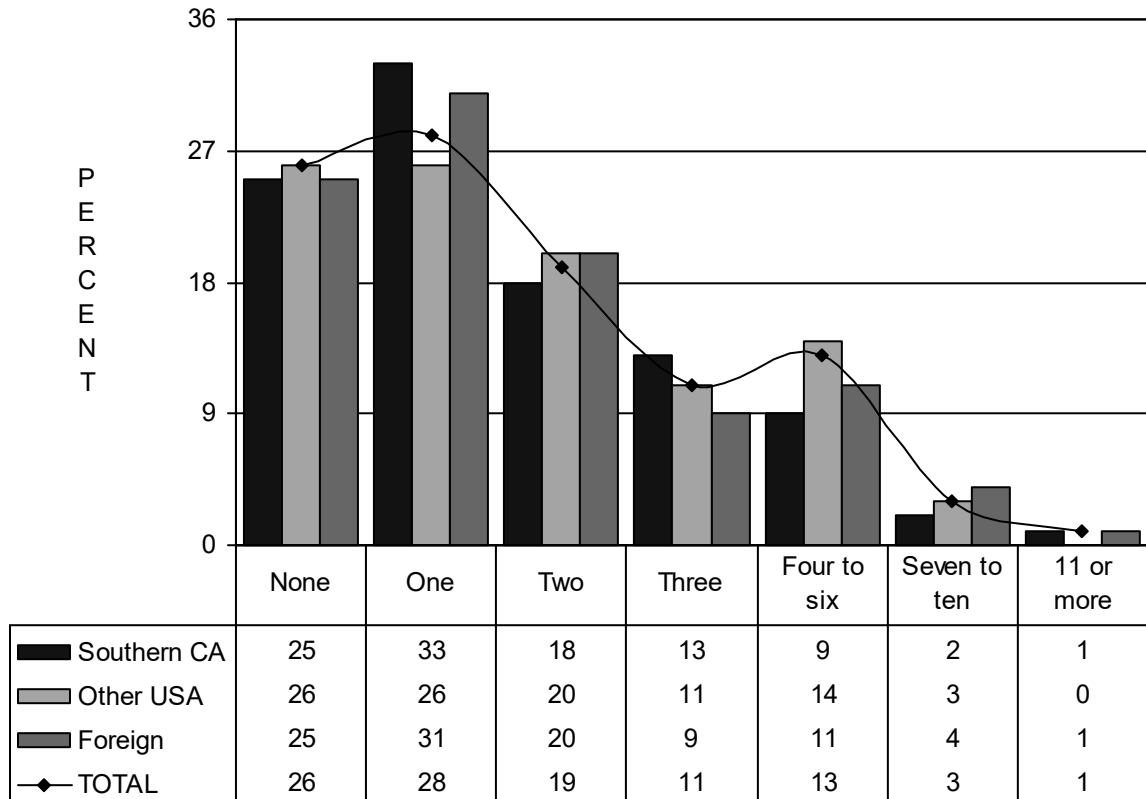


(Means: Southern California=5.4, Other USA=6.0, Foreign=8.3, TOTAL=6.4)

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

* 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*

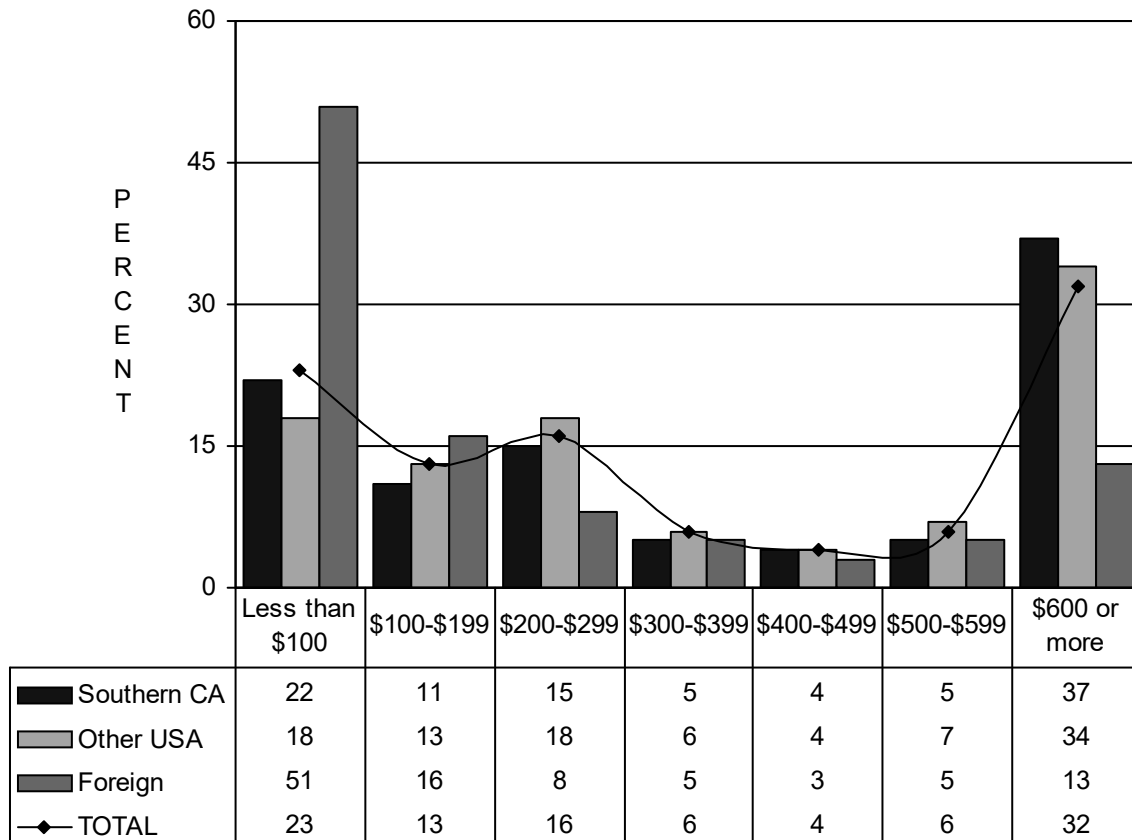


(Means: Southern California=1.7, Other USA=1.9, Foreign=2.0, TOTAL=1.9)

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

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

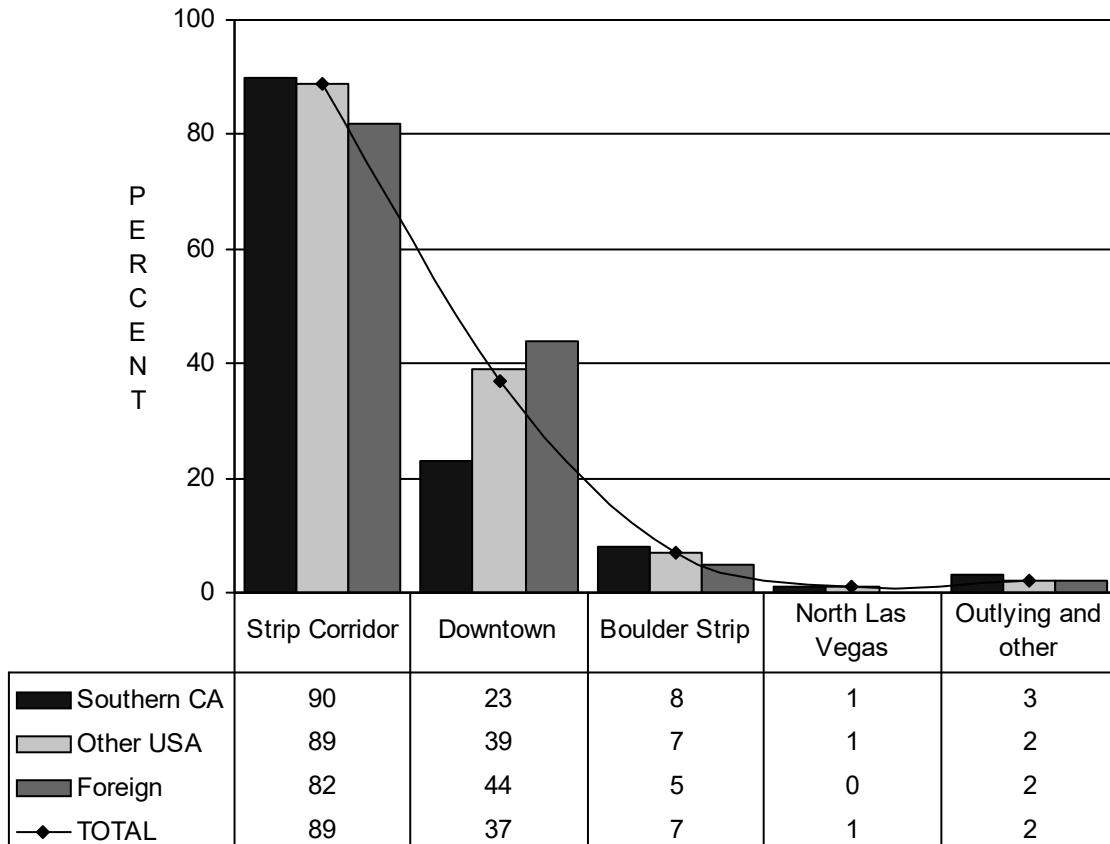
FIGURE 52
Trip Gambling Budget
(Among Those Who Gambled)



(Base Sizes: Southern CA=502, Other USA=2012, Foreign=389, TOTAL=2902)
(Means: Southern CA=\$658.06, Other USA=\$635.16, Foreign=\$277.13 TOTAL=\$591.06)

Overall, those visitors who gambled on their current visit to Las Vegas budgeted an average of \$591.06 for gaming. Southern California visitors (average of \$658.06) and other domestic visitors (\$635.16) budgeted more for gambling than foreign visitors (\$277.13).

FIGURE 53
Where Visitors Gambled
(Among Those Who Gambled)



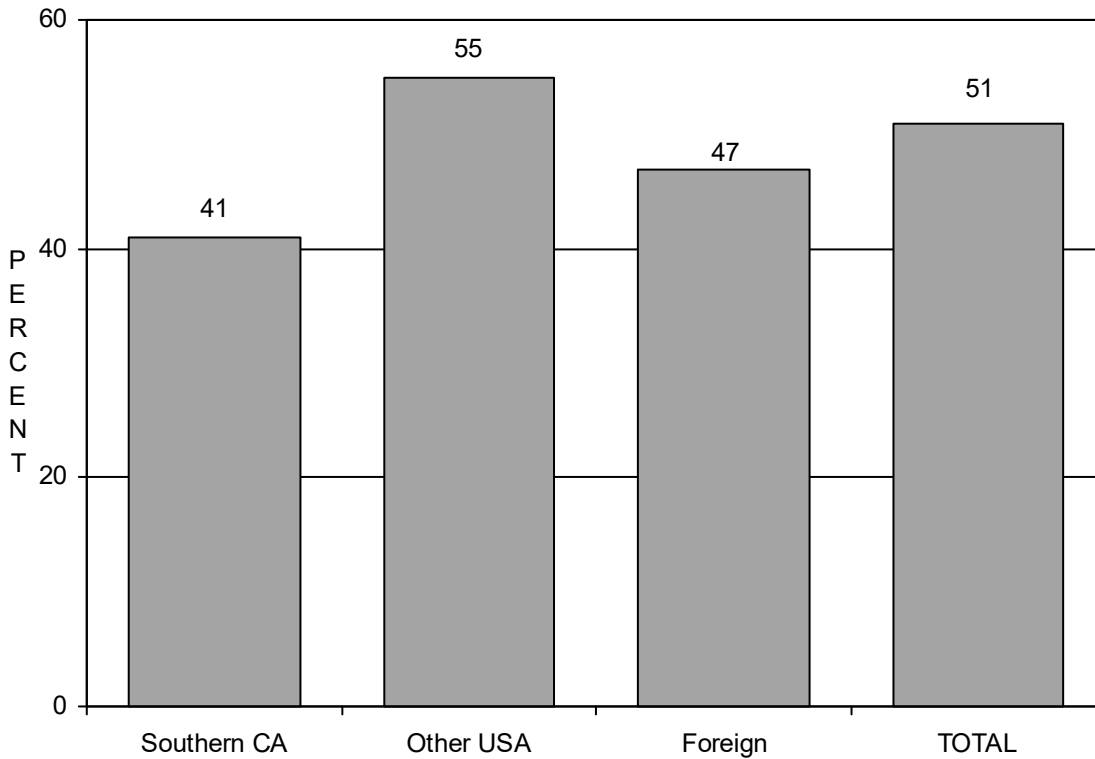
(Base Sizes: Southern CA=502, Other USA=2012, Foreign=389, TOTAL=2902)

Multiple responses permitted.

Most visitors (89%) gambled on the Strip Corridor. Foreign visitors (82%) were the least likely to say they gambled on the Strip Corridor. Southern California visitors (23%) were the least likely to say they gambled downtown.

ENTERTAINMENT

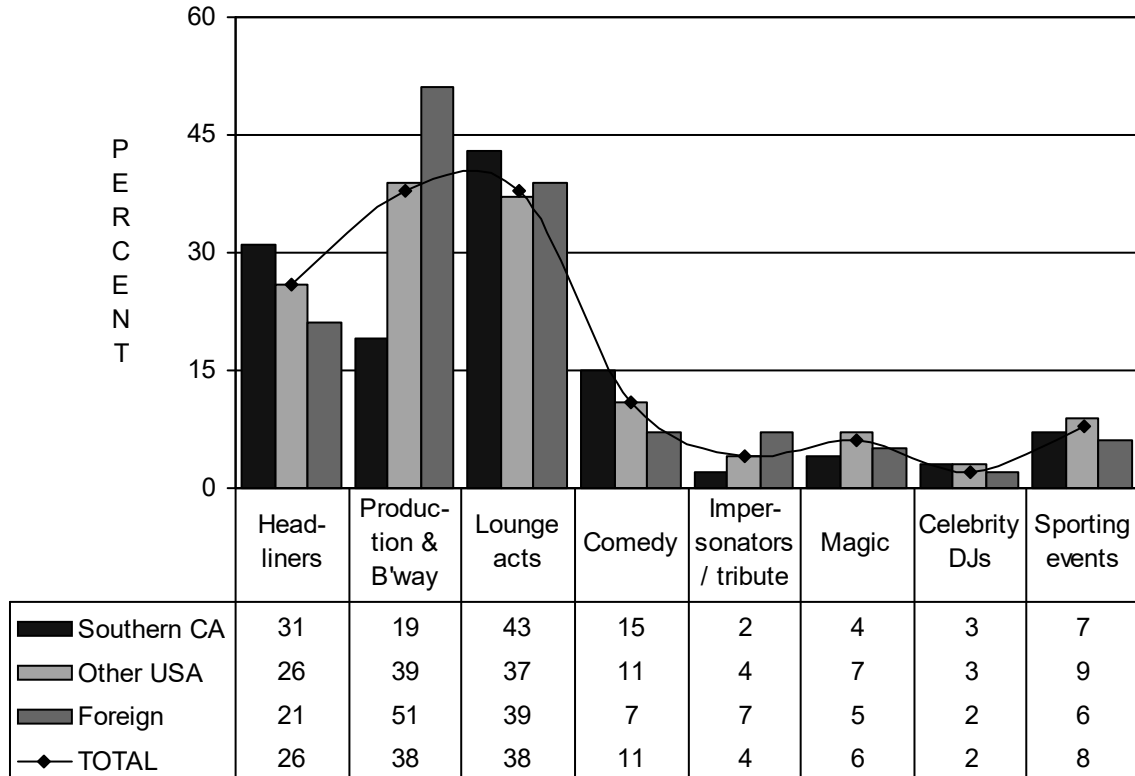
FIGURE 54
Attended A Show



Only "yes" responses are reported in this figure.

During their stay in Las Vegas, other domestic visitors (55%) were the most likely to have seen at least one show.

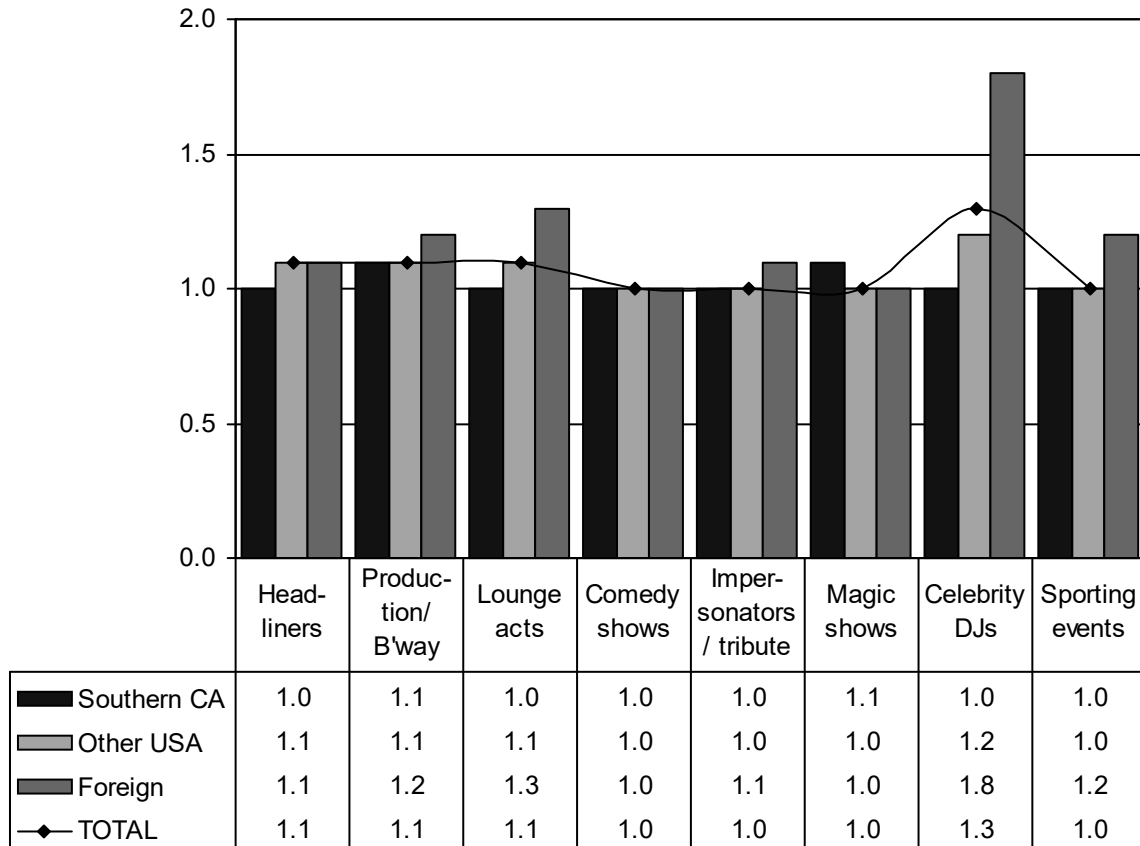
FIGURE 55
Types Of Entertainment
(Among Those Who Attended Some Form Of Entertainment)



Multiple responses permitted.
(Base Sizes: Southern CA=269, Other USA=1337, Foreign=235, TOTAL=1841)

Among those visitors who saw a show while on their most recent trip to Las Vegas, nearly four in ten went to a lounge act or a production or Broadway show (38% each). Foreign visitors (51%) were the most likely segment to see a production or Broadway show and Southern California visitors (19%) were the least likely.

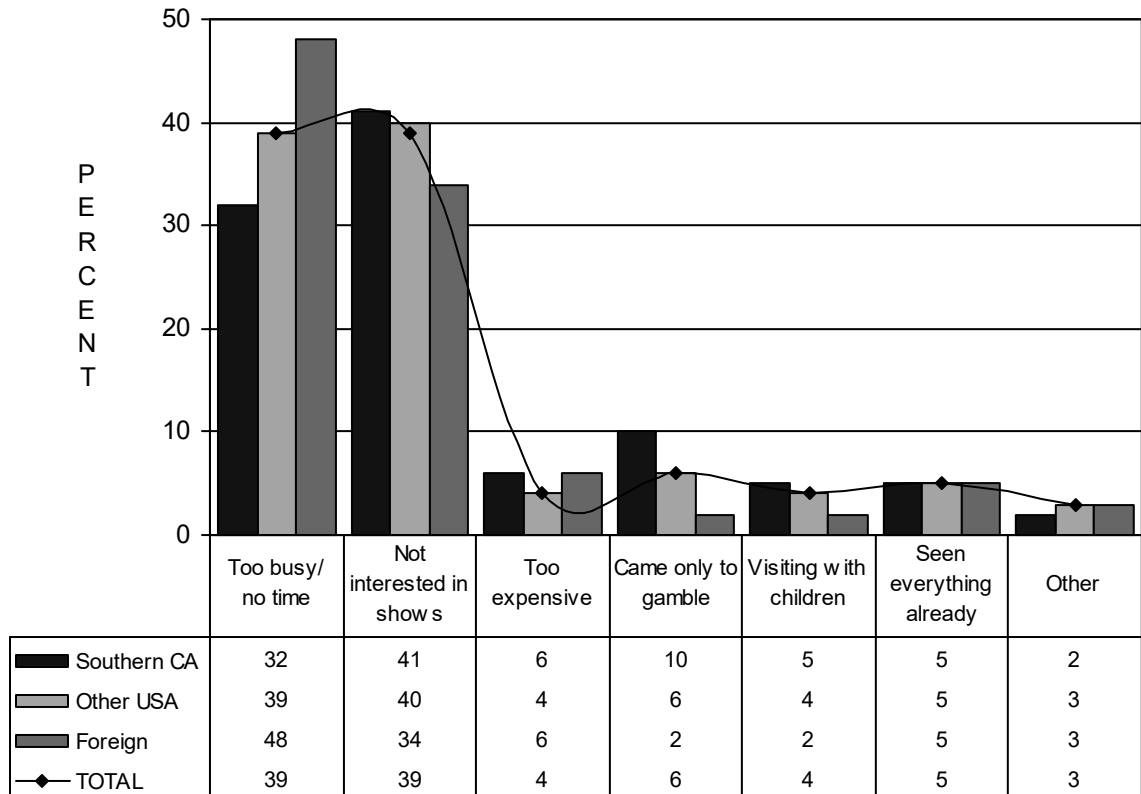
FIGURE 56
Average Number Of Shows Attended
(Among Those Who Attended Some Form Of Entertainment)



Multiple responses permitted.
(Base Sizes: Southern CA=269, Other USA=1337, Foreign=235, TOTAL=1841)

We looked at the average number of times visitors attended each type of show among those who attended shows. Foreign visitors saw more lounge acts (1.3 shows) than Southern California visitors (1.0) and other domestic visitors (1.1). Foreign visitors (1.8) also saw more Celebrity DJ shows than other domestic visitors (1.2) and attended more sporting events than other domestic visitors (1.2 vs. 1.0).

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



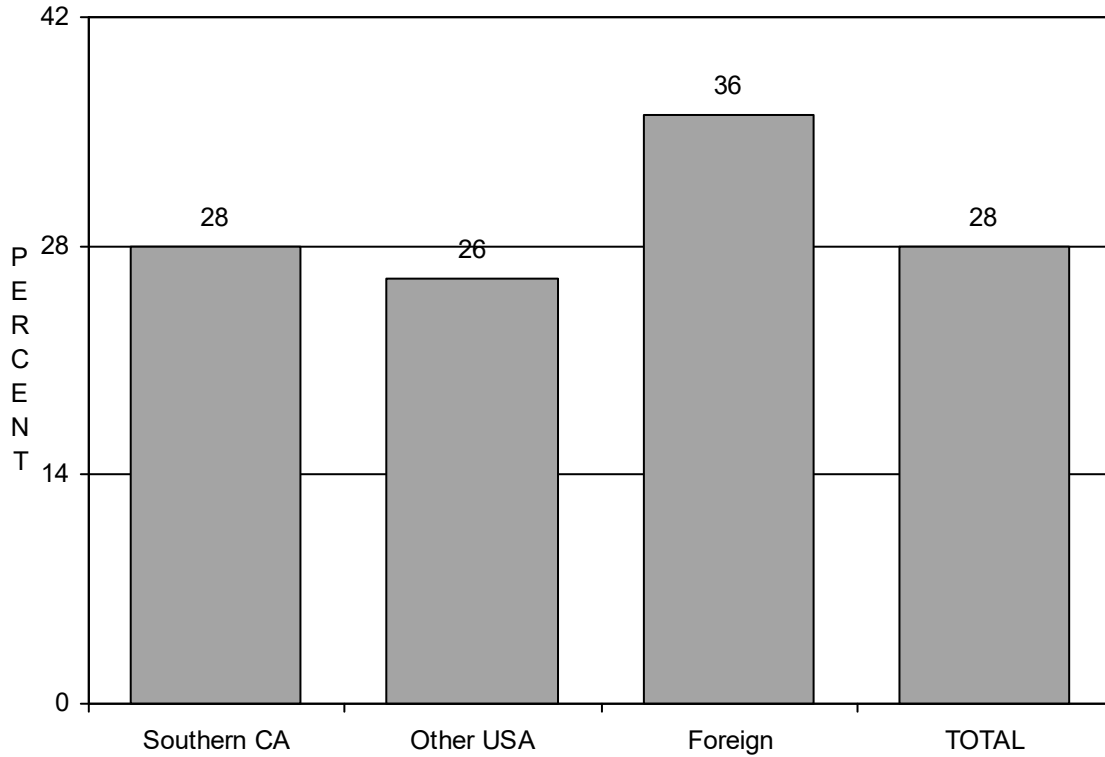
(Base Sizes: Southern CA=325, Other USA=956, Foreign=220, TOTAL=1503)

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

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

FIGURE 58

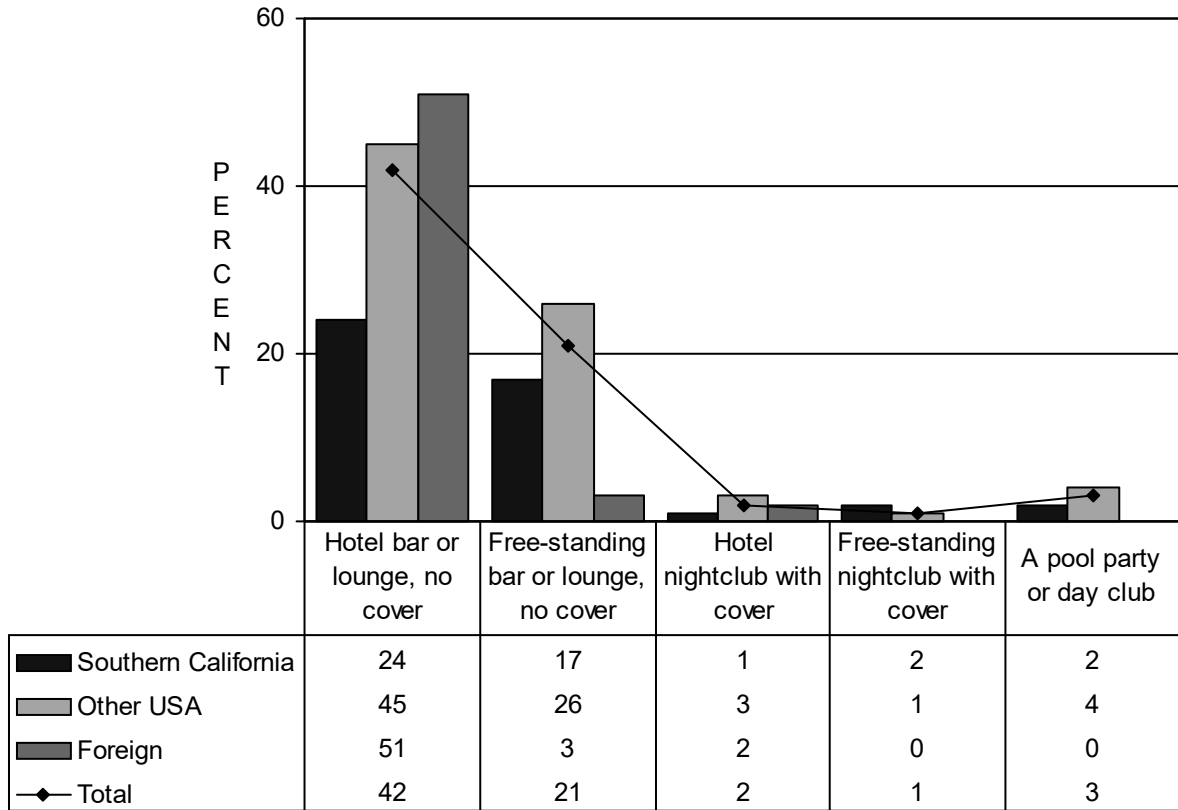
Whether Have Been To Other Paid Attractions



Only "yes" responses are reported in this figure.

We asked visitors if during their current trip to Las Vegas they had been to other Las Vegas attractions for which they had to pay such as theme parks or water parks. Overall, 28% said they had done so. Foreign visitors (36%) were the most likely segment to have gone to these paid attractions.

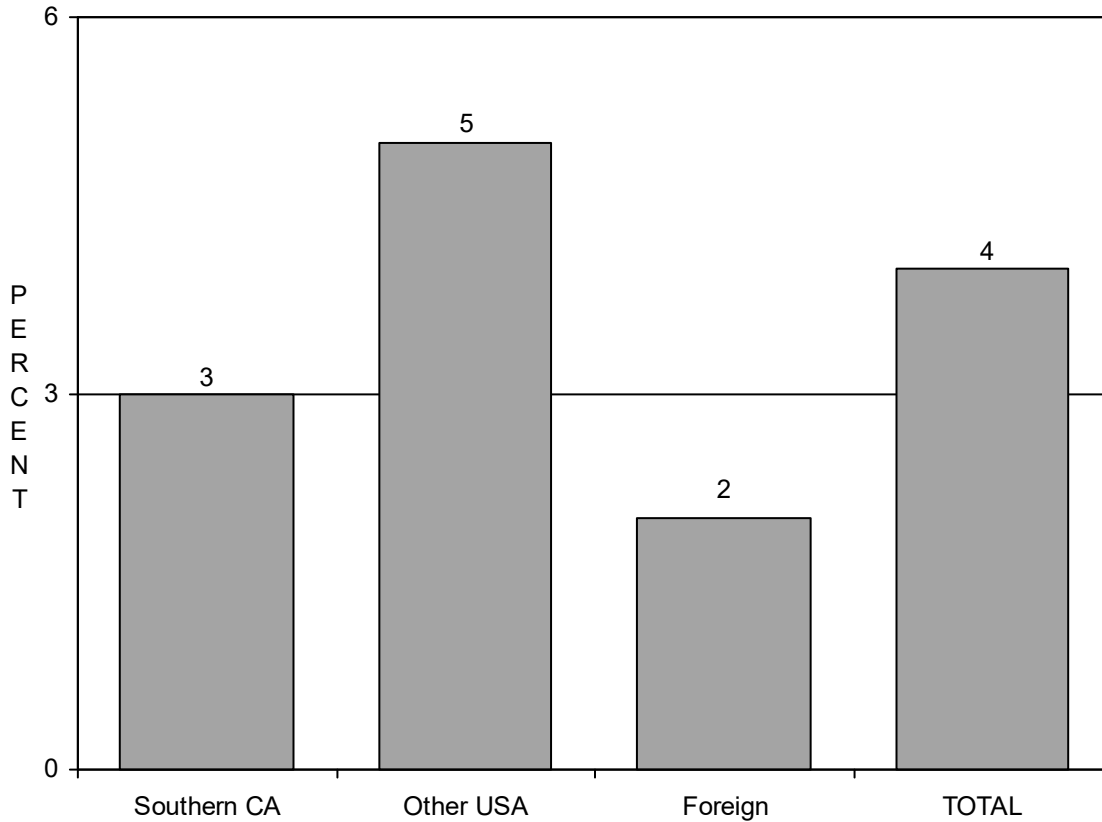
FIGURE 59
Whether Has Been To Nightclubs, Bars, And Lounges



Multiple responses permitted.

We asked visitors if they visited nightclubs, bars, lounges or pool parties or day clubs while in Las Vegas. Southern California visitors were the least likely to say they had been to a bar or lounge in a hotel without a cover charge (24%). Other domestic visitors (26%) were the most likely to have gone to a free-standing bar or lounge without a cover charge, while foreign visitors (3%) were the least likely to have done so. Foreign visitors (less than 1%) were also the least likely segment to have been to a pool party or day club.

FIGURE 60
Whether Visited A Spa*



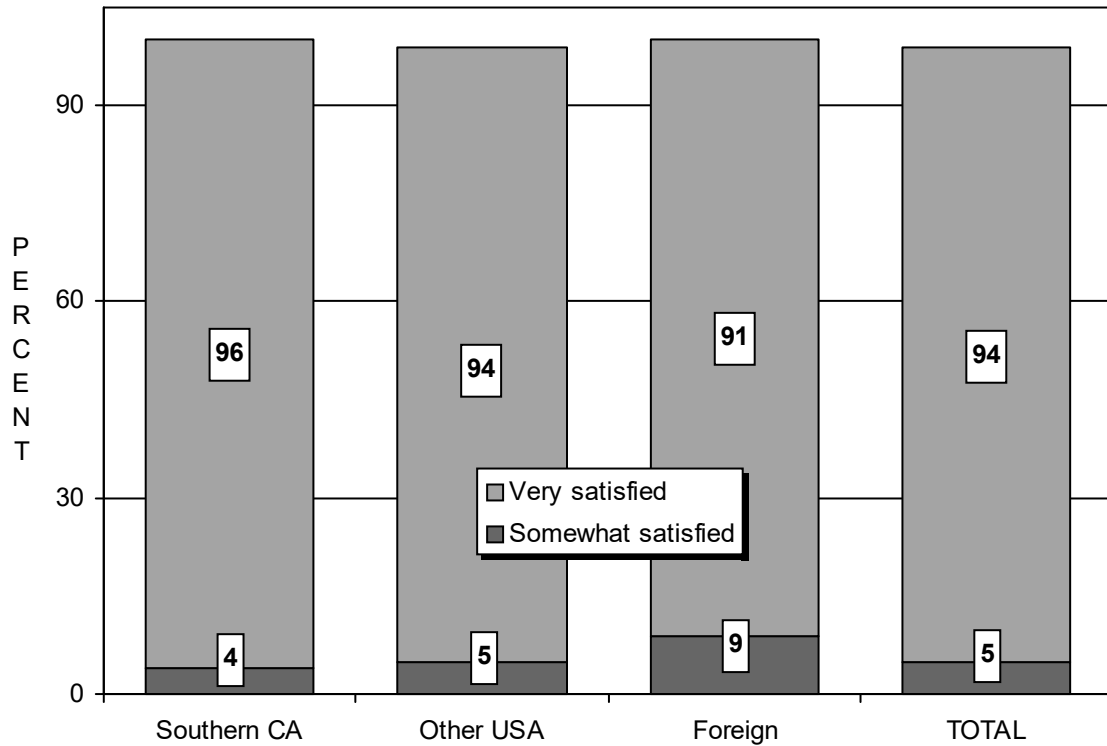
Only "yes" responses are reported in this figure.

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

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

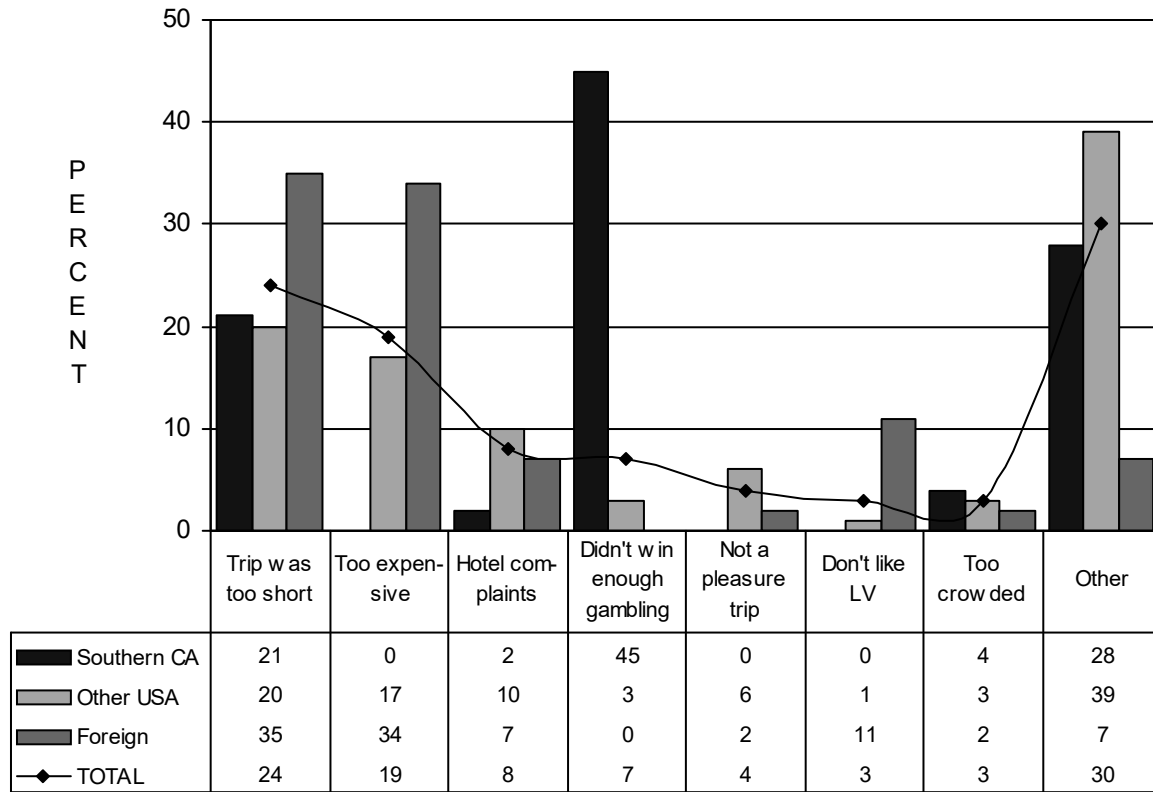
ATTITUDINAL INFORMATION

FIGURE 61
Satisfaction With Visit



Nearly all visitors (94%) said that they were “very satisfied” with their visit to Las Vegas, while 5% said they were “somewhat satisfied.” Foreign visitors (9%) were the most likely segment to say they were “somewhat satisfied.”

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



(Base Sizes: Southern CA=24, Other USA=122, Foreign=46, TOTAL=192)

Visitors who were not completely satisfied with their visit were asked to volunteer why. The most often cited reasons were that the trip was too short (24%) or that it was too expensive (19%). Due to the small segment sample sizes statistical testing did not substantiate any statistically significant differences in these responses among these three segments.

VISITOR DEMOGRAPHICS

With regards to visitor demographics, Southern California visitors were significantly more likely than other domestic visitors to be:

- Having an annual household income of \$80,000 or more (48% vs. 37%).
- Less than 30 years old (19% vs. 14%) or between 30 to 39 years old (29% vs. 21%).
- Non-white (35% vs. 21%), particularly Hispanic/Latino (24% vs. 8%).

Other domestic visitors were significantly more likely than Southern California visitors to be:

- Having an annual household income of \$40,000 to \$59,999 (16% vs. 9%) or \$60,000 to \$79,999 (16% vs. 11%).
- 40 years old or older (66% vs. 51%) and be older on average (47.0 years vs. 43.1 years).
- White (79% vs. 65%).

Foreign visitors were significantly more likely than both Southern California and other domestic visitors to be:

- Unemployed (6% vs. 1% each for Southern California and other domestic visitors), retired (28% vs. 20% for other domestic visitors and 18% for Southern California visitors), or a homemaker (8% vs. 4% each for Southern California and other domestic visitors).
- Married (82% vs. 73% of Southern California visitors and 71% of other domestic visitors).
- White (86% vs. 65% of Southern California visitors and 79% of other domestic visitors).
- Sixty-five years old or older (24% vs. 17% of Southern California visitors and 19% of other domestic visitors).

FIGURE 63
VISITOR DEMOGRAPHICS

	Southern California	Other USA	Foreign	TOTAL
<u>GENDER</u>				
Male	49%	52%	51%	51%
Female	51	48	49	49
<u>MARITAL STATUS</u>				
Married	73	71	82	73
Single	23	21	16	20
Separated/Divorced	3	6	2	5
Widowed	1	2	1	2
<u>EMPLOYMENT</u>				
Employed	73	71	54	69
Unemployed	1	1	6	2
Student	4	3	3	4
Retired	18	20	28	21
Homemaker	4	4	8	5
<u>EDUCATION</u>				
High school or less	16	15	24	17
Some college/trade school	35	34	20	32
College graduate	49	51	56	51
<u>AGE</u>				
21 to 29	19	14	21	16
30 to 39	29	21	15	21
40 to 49	23	23	19	22
50 to 59	9	18	16	16
60 to 64	2	6	5	5
65 or older	17	19	24	19
MEAN	43.1	47.0	46.5	46.2
BASE	(658)	(2436)	(504)	(3599)

FIGURE 64
VISITOR DEMOGRAPHICS

	Southern California	Other USA	Foreign	TOTAL
ETHNICITY				
White	65%	79%	86%	77%
African American/Black	9	11	1	9
Asian/Asian American	2	2	5	3
Hispanic/Latino	24	8	8	11
Other	1	0	0	0
HOUSEHOLD INCOME				
Less than \$20,000	7	6	7	6
\$20,000 to \$39,999	8	11	1	9
\$40,000 to \$59,999	9	16	6	13
\$60,000 to \$79,999	11	16	13	15
\$80,000 or more	48	37	43	40
Not sure/no answer	18	14	31	17
VISITOR ORIGIN				
<u>U.S.A.</u>	<u>0</u>	<u>100</u>	<u>0</u>	<u>86</u>
Eastern states*	0	15	0	10
Southern states†	0	25	0	17
Midwestern states‡	0	18	0	12
Western states§	<u>100</u>	<u>42</u>	<u>0</u>	<u>47</u>
California	100	5	0	21
Southern California	100	0	0	18
Northern California	0	5	0	3
Arizona	0	13	0	9
Other Western states	0	24	0	16
<u>Foreign</u>	<u>0</u>	<u>0</u>	<u>100</u>	<u>14</u>
BASE	(658)	(2436)	(504)	(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.