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LAS VEGAS VISITOR PROFILE

Calendar Year 2007

Annual Report

Prepared for:

Las Vegas Convention And Visitors Authority

By:

GLS Research

ACKNOWLEDGMENTS

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

VISITOR PROFILE STUDY

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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. **In the past, data has been collected within a fiscal year, from July through June, and all reports prior to 2004 displayed <u>fiscal</u> year data. Based on collective feedback of the LVCVA's resort partners and other key audiences, beginning with the 2004 visitor profile the data is presented following a <u>calendar</u> year timeframe. With data now reported on a <u>calendar</u> year basis, the 2003 figures in this report may differ from the fiscal 2003 figures reported in previous visitor profile studies.**

This report presents the findings from in-person interviews GLS Research collected as follows: 3,345* from January 1, 2003 to December 31, 2003, 3,300 from January 1, 2004 to December 31, 2004, and 3,600 from January 1, 2005 to December 31, 2005, January 1, 2006 to December 31, 2006, and January 1 to December 31, 2007. Approximately 275 in-person interviews were conducted per month in or near Las Vegas hotel-casinos and motels in 2003 and 2004, and approximately 300 interviews per month in 2005, 2006 and 2007.

This report presents the results of calendar year 2007, as well as the previous years (2003, 2004, 2005 and 2006). Statistically significant differences in the behavior, attitudes, and opinions of visitors from year to year are pointed out in the text of the report. Throughout this report, if data is not presented for all five years, it is because the question was not asked for all five years.

When we note that a difference between subgroups on a particular measure is "significant" or "statistically significant," we mean that there is a 95% or better chance that the difference is the result of true differences between the subgroup populations and is not due to sampling error alone. When we note that a difference between subgroups is "not significant" or "not statistically significant," we mean that there is less than a 95% chance that the difference is the result of true differences between the subgroups.

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* Data was collected in fiscal year intervals through June 30, 2004. Because the sampling is pre-stratified based on monthly visitor flow information from the previous year, the number of interviews collected each month is not exactly 275. The yearly total for 2003 (3,345) is the sum of the monthly interviews completed in calendar year 2003. Starting in July 2004, monthly quotas were adjusted to achieve the yearly quota of 3,300 in 2004 and 3,600 from 2005 to 2007.

In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2007. These questions will be rotated back into the questionnaire in Calendar Year 2008 and subsequently asked every other year. In addition, several new questions were added to the Las Vegas Visitor Profile Study in Calendar Year 2007. These questions are noted in the text accompanying the figures in the body of this report.

This section presents the research highlights. The findings are presented in detail beginning on page 13.

REASONS FOR VISITING — EXECUTIVE SUMMARY

Nineteen percent (19%) of 2007 visitors indicated they were first-time visitors to Las Vegas. Four in ten (42%) of all visitors said their primary reason for visiting Las Vegas this trip was vacation or pleasure, down from previous years. Thirteen percent (13%) said they came to visit friends and relatives, and 11% said they came to gamble. Among repeat visitors, 38% came for vacation or pleasure (down from prior years), and 14% each came to gamble or to visit friends and relatives. The majority of first-time visitors continue to come primarily for vacation or pleasure (60%), with almost none (1%) saying they came to gamble, and few (8%) having come to visit friends and relatives. The average number of visits over the past five years was 6.3. The average number of visits in the past year was 1.8.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2003	2004	2005	2006	2007
Proportion of visitors who were first-time visitors	17%	19%	18%	19%	19%
Proportion of visitors whose primary purpose for current trip was vacation or pleasure	63%	63%	61%	49%	42%
Proportion of visitors whose primary purpose for current trip was to gamble	4%	4%	5%	11%	11%
Proportion of visitors whose primary purpose for current trip was to visit friends and relatives	6%	7%	7%	11%	13%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	62%	62%	59%	46%	38%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	4%	5%	6%	13%	14%
Proportion of repeat visitors whose primary purpose for current trip was to visit friends and relatives	6%	7%	8%	12%	14%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	68%	68%	69%	67%	60%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	1%	1%	1%	1%	1%
Proportion of first-time visitors whose primary purpose for current trip was to visit friends and relatives	2%	5%	5%	5%	8%
Average number of visits in past five years	6.5	6.5	6.3	6.2	6.3
Average number of visits in past year	1.7	1.8	1.7	1.7	1.8

TRAVEL PLANNING — EXECUTIVE SUMMARY

Fifty-four percent of visitors (54%) arrived via ground transportation, and 46% arrived by air. Forty-six percent (46%) of visitors said they used their own vehicles while traveling around Las Vegas, up significantly from 43% in 2003 and 41% in 2004. Taxi use stands at 27%, while 36% of visitors volunteered that they walked while in Las Vegas.

The proportion of visitors who reported using a travel agent to plan their current trip to Las Vegas declined to 15% in 2007 from 22% in 2003 and 20% in 2004. Visitors were asked if they used the Internet to plan their current trip to Las Vegas, and 40% said they had done so, down from 43% last year. Of these visitors, 60% said they booked their accommodations online (similar to last year, but down significantly from 2003-2005), while 63% said they used the Internet to book their transportation, up from all past years. The proportion who said they found information online that influenced their choice of accommodations was 34%, down from 56% in 2003 and 42% in 2004.

The proportion of visitors who said they had visited Downtown Las Vegas was 40%, down significantly from past years.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2003	2004	2005	2006	2007
Proportion of visitors who traveled to Las Vegas by ground transportation (automobile/bus/RV)	55%	53%	53%	54%	54%
Proportion of visitors who traveled to Las Vegas by air	45%	47%	47%	46%	46%
Proportion of visitors who used their own vehicle when traveling around Las Vegas	43%	41%	47%	48%	46%
Proportion of visitors who reported walking when traveling around Las Vegas	56%	40%	24%	39%	36%
Proportion of visitors who used taxis when traveling around Las Vegas	26%	27%	26%	29%	27%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Las Vegas	22%	20%	17%	16%	15%
Proportion who used the Internet to plan trip	32%	39%	40%	43%	40%
Proportion of those who used the Internet who said they did so to book accommodations	75%	79%	75%	62%	60%
Proportion of visitors who used the Internet to book transportation	47%	56%	55%	57%	63%
Proportion of visitors who used the Internet, and it influenced their choice in accommodations	56%	42%	32%	37%	34%
Proportion of visitors who visited Downtown Las Vegas on their current trip	51%	57%	46%	48%	40%

TRIP CHARACTERISTICS AND EXPENDITURES — EXECUTIVE SUMMARY

The average party size in 2007 was 2.5 persons, up from 2.4 in 2003. Eight percent of visitors (8%) had children under the age of 21 in their immediate party, down from 10% each in 2003, 2004, and 2006. Virtually all (99.3%) visitors stayed overnight.

Visitors in the 2007 study stayed an average of 3.5 nights and 4.5 days in Las Vegas. Among overnighters, 95% stayed in a hotel or motel with an average of 2.2 room occupants. Visitors spent an average of $108.87 per night on lodging this year, up significantly from $81.43 in 2003, $86.22 in 2004, and $99.51 in 2005. One-third (33%) of visitors staying in a hotel or motel paid a regular room rate, down from 41% in 2004, 43% in 2005, and 38% last year. Fourteen percent (14%) purchased a package trip, down significantly from 19% each in 2003 and 2004, and 17% in 2005. The average cost of such a package in 2007 was $709.90, up significantly from $484.13 in 2003, $561.49 in 2004, and $571.43 in 2005, and up slightly from $662.78 last year.

Over the course of their entire stay in Las Vegas, visitors spent an average of $254.49 for food and drink (up from $208.81 in 2003, and $238.32 in 2004), and $62.66 for local transportation (down from $68.70 last year). Visitors spent an average of $114.50 for shopping (up from $97.25 in 2003), $47.87 on shows (up from $42.26 in 2003), and $8.31 on sightseeing.

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2003	2004	2005	2006	2007
Average number of adults in immediate party	2.4	2.6	2.5	2.6	2.5
Proportion of visitors with persons under 21 in their immediate party	10%	10%	9%	10%	8%
Proportion of visitors who stayed overnight	99%	99%	99%	99%	99%
Days stayed (average)	4.6	4.6	4.5	4.6	4.5
Nights stayed (average)	3.6	3.6	3.5	3.6	3.5
Proportion of visitors who stayed in a hotel or motel room	95%	95%	94%	94%	95%
Number of room occupants (average — hotel/motel only)	2.1	2.1	2.1	2.2	2.2
Lodging expenditures (average per night — non-package)	$81.43	$86.22	$99.51	$107.12	$108.87
Proportion of visitors who paid a regular room rate	24%	41%	43%	38%	33%
Proportion of visitors who bought a package or travel group trip	19%	19%	17%	15%	14%
Average cost of package per person (among package/tour group visitors)	$484.13	$561.49	$571.43	$662.78	$709.90
Average trip expenditures for food and drink	$208.81	$238.32	$248.40	$260.68	$254.49
Average trip expenditures for local transport	$48.93	$64.62	$60.46	$68.70	$62.66
Average trip expenditures for shopping	$97.25	$124.39	$136.60	$140.86	$114.50
Average trip expenditures for shows	$42.26	$47.21	$49.43	$50.81	$47.87
Average trip expenditures for sightseeing	$5.05	$8.01	$8.21	$8.49	$8.31

GAMING BEHAVIOR AND BUDGETS — EXECUTIVE SUMMARY

Eighty-four percent (84%) of 2007 visitors said they gambled while in Las Vegas, down from 88% in 2003 and 87% each in 2004 and 2006. Gamblers spent an average of 3.4 hours per day gambling, down from 3.6 in 2003 and 2005. The average gaming budget in 2007 was $555.64, down significantly from $626.50 in 2005 and $651.94 in 2006. Nearly half of visitors (48%) said they would be *more* likely to visit Las Vegas even with the wider gambling choices available to them, up from all prior years.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2003	2004	2005	2006	2007
Proportion who gambled while visiting Las Vegas	88%	87%	86%	87%	84%
Average number of hours per day spent gambling (among those who gambled)	3.6	3.3	3.6	3.3	3.4
Average trip gambling budget (among those who gambled)	$490.87	$544.93	$626.50	$651.94	$555.64
Proportion who said they would be “more likely” to visit Las Vegas even with more places to gamble outside Las Vegas	32%	29%	39%	36%	48%

ENTERTAINMENT — EXECUTIVE SUMMARY

Sixty-three percent (63%) of visitors attended shows during their current stay, down from prior years. Among those who saw a show in Las Vegas, 64% went to a lounge act, down significantly from 75% last year. Attendance for comedy shows (21%) was up significantly from 14% last year. Nineteen percent (19%) of visitors who saw shows saw a big-name headliner, similar to 17% in 2006. Twenty-two percent (22%) of all visitors said they had been to other paid attractions in Las Vegas, down from 28% last year.

SUMMARY TABLE OF ENTERTAINMENT ACTIVITIES

	2003	2004	2005	2006	2007
Proportion who attended any shows during their current stay in Las Vegas	75%	82%	71%	76%	63%
Proportion who attended lounge acts (among those who attended shows)	86%	89%	85%	75%	64%
Proportion who attended big-name headliner performances (among those who attended shows)	3%	4%	5%	17%	19%
Proportion who attended comedy shows (among those who attended shows)	13%	14%	14%	14%	21%
Proportion who went to other paid attractions in Las Vegas	13%	21%	23%	28%	22%

ATTITUDINAL INFORMATION — EXECUTIVE SUMMARY

Eighty-nine percent (89%) of visitors reported being “very satisfied” with their trip to Las Vegas, down from 95% in 2003, 93% in 2004, 94% in 2005 and 96% last year.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2003	2004	2005	2006	2007
Proportion who were “very satisfied” with their current trip to Las Vegas	95%	93%	94%	96%	89%

VISITOR DEMOGRAPHICS — EXECUTIVE SUMMARY

Visitors in 2007 were likely to be married (79%, the same as last year, but up from 2003-2005), earning $40,000 or more (80%, up from 2003 and 2004), and employed (67%, up from 64% in 2003). One-quarter were retired (26%, down from 30% in 2003). The proportion of visitors who were 40 years old or older was 71%, and the average age was 49.0, up from 47.7 in 2005 and 48.0 last year. More than one-half of visitors were from the Western United States (52%), with the bulk of them coming from California (31%, down from 34% in 2003). Twelve percent (12%) of visitors were foreign.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2003	2004	2005	2006	2007
Proportion of visitors who were married	73%	73%	74%	79%	79%
Proportion of visitors with a household income of $40,000 or more	66%	70%	79%	78%	80%
Proportion of visitors who were employed	64%	67%	67%	70%	67%
Proportion of visitors who were retired	30%	26%	24%	24%	26%
Proportion of visitors who were 40 years old or older	75%	72%	68%	69%	71%
Average age	50.2	49.0	47.7	48.0	49.0
Proportion of visitors with a college diploma	41%	42%	44%	48%	44%
Proportion of visitors from the West	52%	48%	52%	52%	52%
Proportion of visitors from California	34%	31%	33%	32%	31%
Proportion of visitors from a foreign country	12%	13%	12%	13%	12%

SUMMARY OF ECONOMIC IMPACT FACTORS — EXECUTIVE SUMMARY

The following table summarizes the various factors included throughout this report related to the economic impact of Las Vegas visitors.

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2003	2004	2005	2006	2007
Days stayed (average)	4.6	4.6	4.5	4.6	4.5
Nights stayed (average)	3.6	3.6	3.5	3.6	3.5
Proportion of visitors who stayed overnight	99%	99%	99%	99%	99%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	95%	95%	94%	94%	95%
Lodging expenditures (average per night — non-package)	$81.43	$86.22	$99.51	$107.12	$108.87
Proportion of visitors who bought a package or travel group trip	19%	19%	17%	15%	14%
Average cost of package per person (among package/tour group visitors)	$484.13	$561.49	$571.43	$662.78	$709.90
Number of room occupants (average)	2.1	2.1	2.1	2.2	2.2
Average trip expenditures for food and drink	$208.81	$238.32	$248.40	$260.68	$254.49
Average trip expenditures for local transport	$48.93	$64.62	$60.46	$68.70	$62.66
Average trip expenditures for shopping	$97.25	$124.39	$136.60	$140.86	$114.50
Average trip expenditures for shows	$42.26	$47.21	$49.43	$50.81	$47.87
Average trip expenditures for sightseeing	$5.05	$8.01	$8.21	$8.49	$8.31
Proportion who gambled while visiting Las Vegas	88%	87%	86%	87%	84%
Average trip gambling budget (among those who gambled)	$490.87	$544.93	$626.50	$651.94	$555.64

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.

In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2007. These questions will be rotated back into the questionnaire in Calendar Year 2008 and subsequently asked every other year. In addition, several new questions were added to the Las Vegas Visitor Profile Study in Calendar Year 2007. These questions are noted in the text accompanying the figures in the body of this report.

METHODOLOGY

Starting in 2005, GLS Research, in consultation with the LVCVA, developed a new sampling plan based on marketing seasons. The goal was to obtain a sufficient number of interviews by marketing season to permit comparisons across seasons.

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 always been weighted to more accurately reflect actual visitors to Las Vegas in terms of mode of transportation, lodging type, and lodging location. Specifically, the transportation data are weighted based on a compilation of data provided by the LVCVA, McCarran International Airport, and the Nevada Department of Transportation. The figures used to weight the occupancy data are based on independent surveys conducted by the LVCVA, which provide the number of available rooms and occupancy rates for the destination on a monthly basis. Because of the change to the data collection methodology in 2005, it was necessary to add a third weighting factor, namely visitor flow by month, to correct for the discrepancies in visitor flow introduced by the new sampling plan. Visitor flow information is also based on independent surveys conducted by the LVCVA as part of their ongoing room occupancy audit.

Visitors were intercepted in the vicinity of Las Vegas casinos, hotels, motels, and RV parks. 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 incentives. Verification procedures were conducted throughout the project to assure accurate and valid interviewing.

Interviews were edited for completeness and accuracy, and entered into a computerized database for analysis. The information was then analyzed using statistical software packages available to GLS Research. The questionnaire administered to visitors is appended to this report in the form of aggregate results.

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 2007 and the preceding years, 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 on a particular measure is "significant" or "statistically significant," we mean that there is a 95% or better chance that the difference is the result of true differences between the subgroup populations and is not due to sampling error alone. When we note that a difference between subgroups is "not significant" or "not statistically significant," we mean that there is less than a 95% chance that the difference is the result of true differences between the subgroups.

This report presents the results of the 2007 study, as well as for the previous calendar years (2003, 2004, 2005, and 2006). Statistically significant differences in the behavior, attitudes, and opinions of visitors from year to year are pointed out in the text of the report. Throughout this report, if data are not presented for all years, it is because the question was not asked in every year.

In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2007. These questions will be rotated back into the questionnaire in Calendar Year 2008 and subsequently asked every other year. In addition, several new questions were added to the Las Vegas Visitor Profile Study in Calendar Year 2007. These questions are noted in the text accompanying the figures in the body of this report.

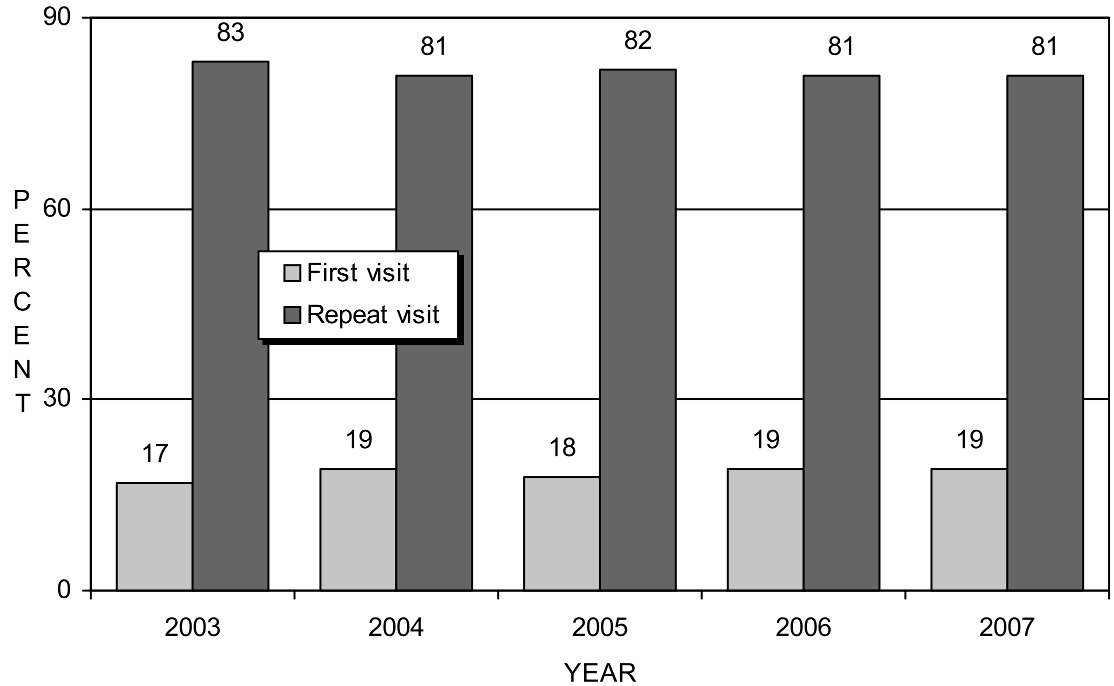
Details on the findings and conclusions of the survey are presented in the following sections of this report.

SUMMARY OF FINDINGS

REASONS FOR VISITING

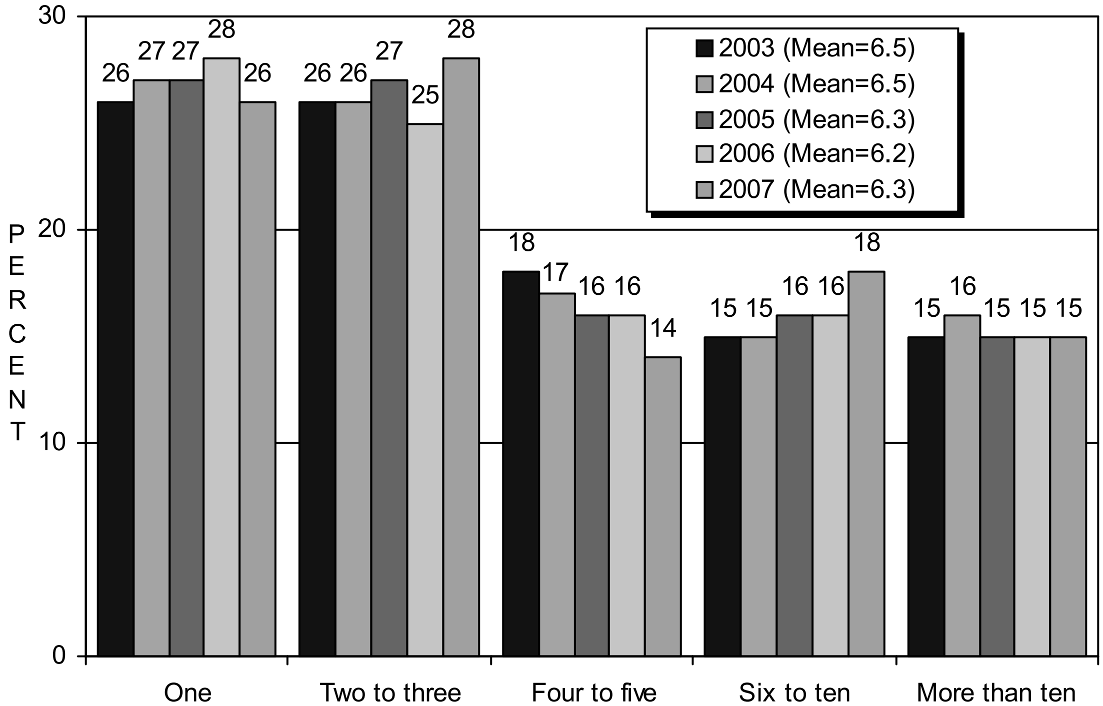
Nineteen percent (19%) of 2007 visitors indicated they were first-time visitors to Las Vegas — consistent with the past four years (Figure 1).

FIGURE 1
First Visit vs. Repeat Visit*



* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

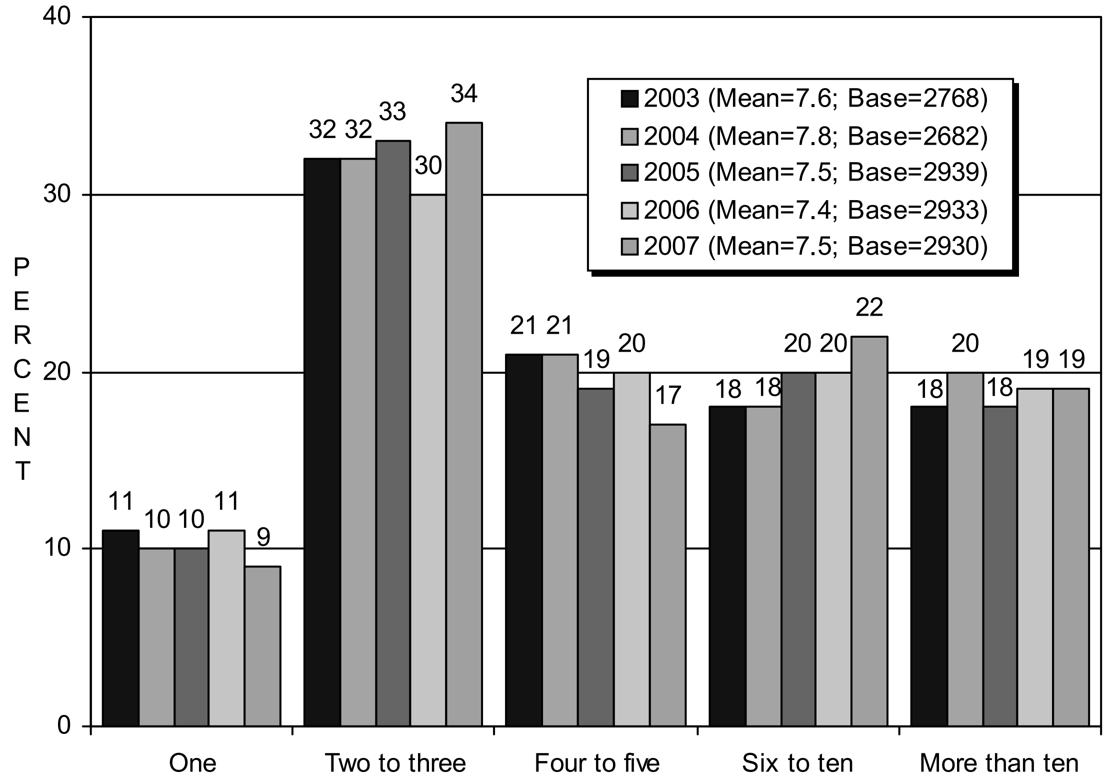
FIGURE 2
Frequency Of Visits In Past Five Years*
(Among All Visitors)



Among all visitors, the average number of visits to Las Vegas over the past five years was 6.3, not significantly different from the past four years (Figure 2).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

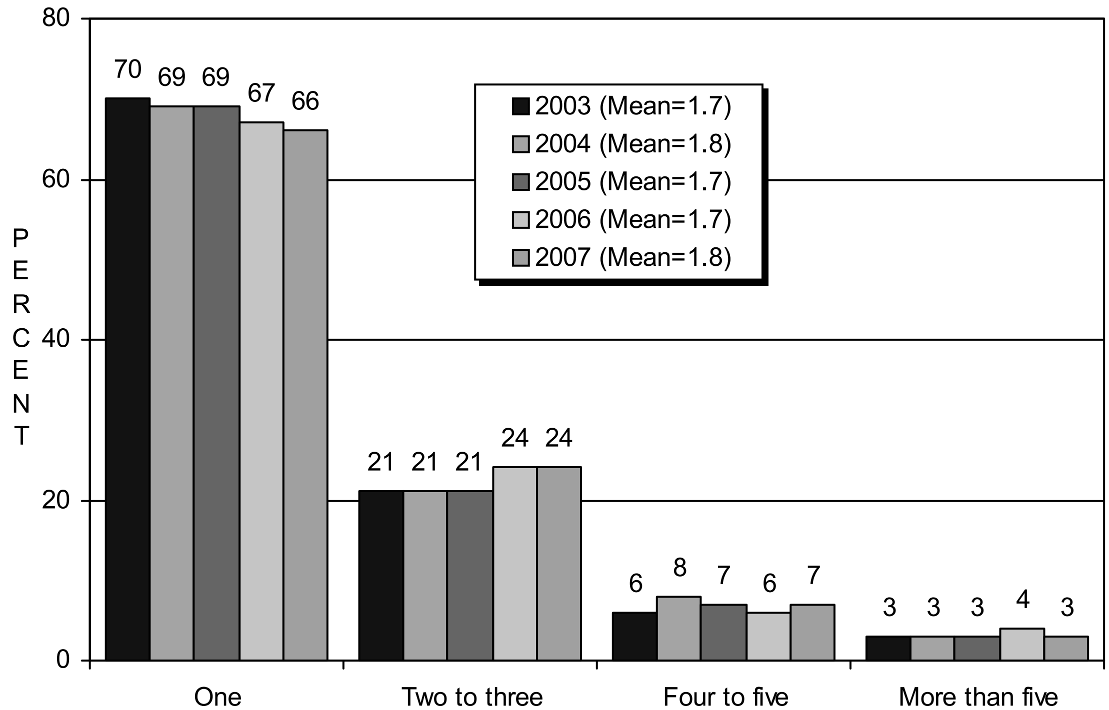
FIGURE 3
Frequency Of Visits In Past Five Years*
(Among Repeat Visitors)



In 2007, *repeat visitors* reported making an average of 7.5 visits to Las Vegas over the past five years, about the same as in prior years (Figure 3).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

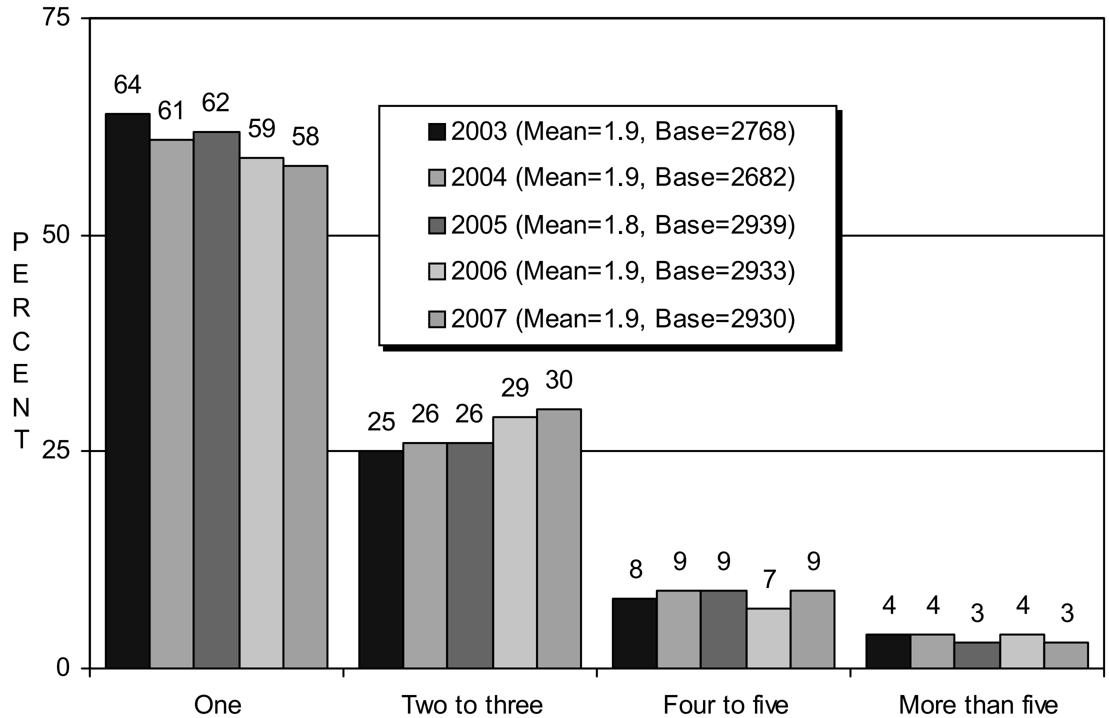
FIGURE 4
Frequency Of Visits In Past Year*
(Among All Visitors)



A*mong all visitors*, the average number of visits to Las Vegas in the past 12 months was 1.8, up slightly from 1.7 in 2005 (Figure 4). However, there has been an upward trend among those visiting two to three times in the past year, from 21% in 2003 to 2005 to 24% in 2006 and 2007, while the proportion of those visiting only once has dropped from 70% in 2003 to 66% currently.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

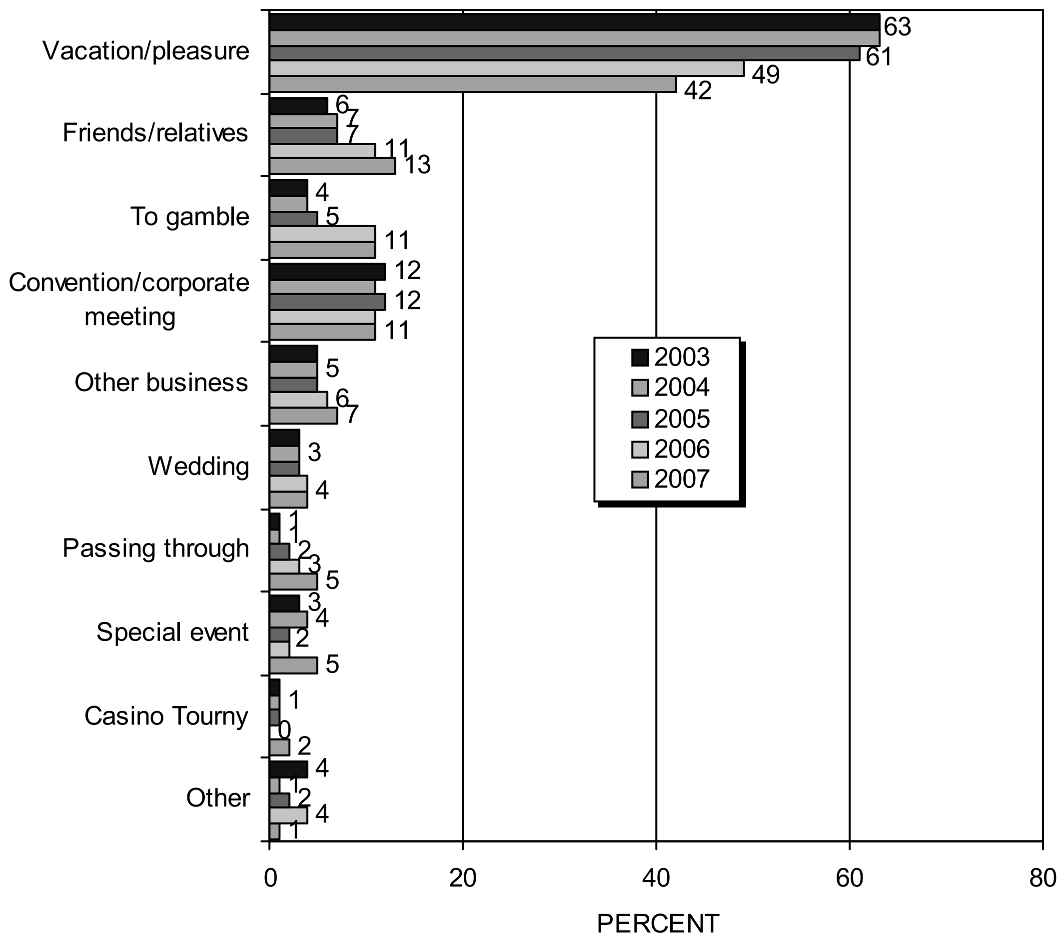
FIGURE 5
Frequency Of Visits In Past Year*
(Among Repeat Visitors)



Among *repeat* visitors, the average number of visits to Las Vegas during the past year was 1.9, similar to past years (Figure 5). As with all visitors, there has been an upward trend among repeat visitors who visited two to three times in the past year, from 25% in 2003 to 30% currently, while the proportion of those visiting only once has dropped from 64% in 2003 to 58% currently.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

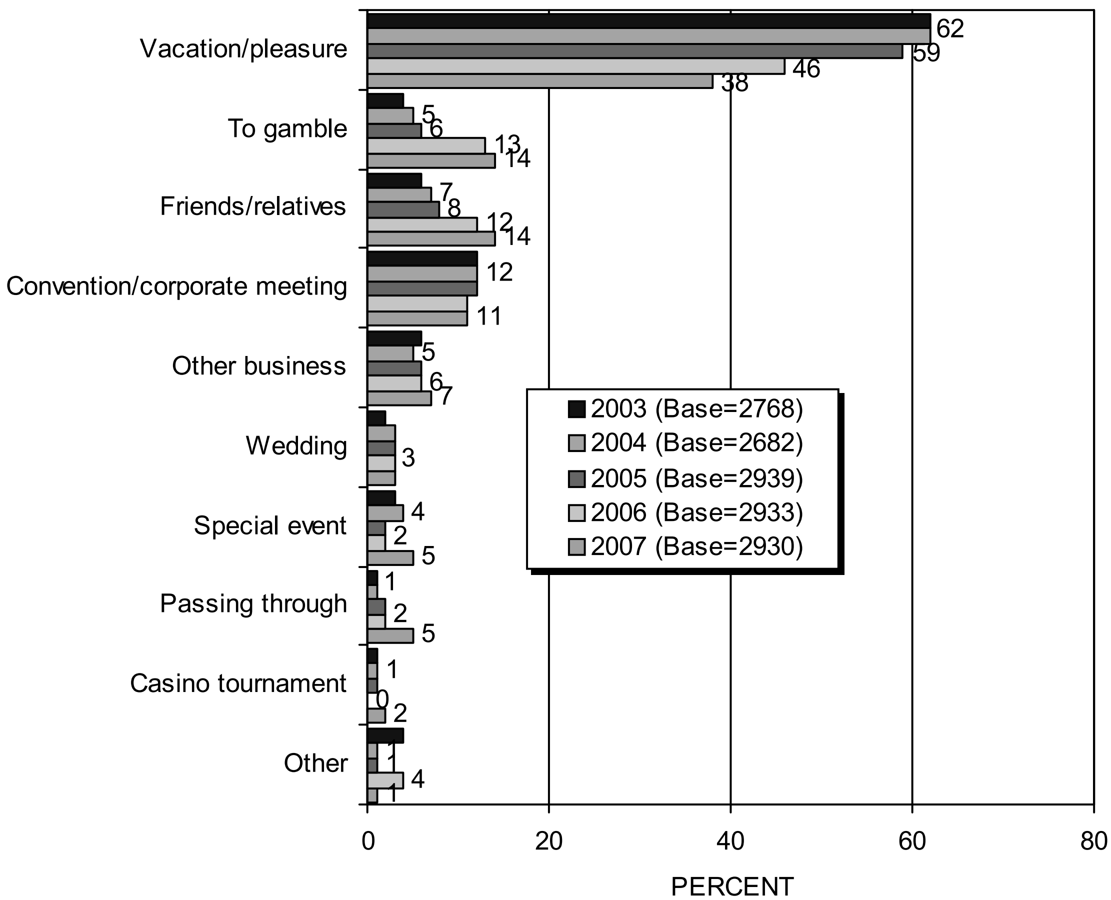
FIGURE 6
Primary Purpose Of Current Visit*
(Among All Visitors)



When asked about the primary purpose of their current visit to Las Vegas, 42% of all visitors mentioned vacation or pleasure, down significantly from 63% in 2003 and 2004, 61% in 2005, and 49% in 2006 (Figure 6). Increases in two categories account for most of this drop: 13% said they were visiting friends or relatives (up significantly from prior years), and 11% were in Las Vegas to gamble (the same as last year, but up significantly from 2003 to 2005). Another eleven percent (11%) mentioned a convention, trade show, or corporate meeting, while 7% were in town on other business, up from 5% from 2003 to 2005. Five percent each said they were in town for a special event or just passing through, up from all prior years. Four percent (4%) came for a wedding, and 2% for a casino tourney (up from all prior years).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 7
Primary Purpose Of Current Visit*
(Among Repeat Visitors)



The proportion of *repeat visitors* who said the primary purpose of their current visit to Las Vegas was vacation or pleasure was 38%, down significantly from past years (Figure 7). As with all visitors, increases in two categories account for much of this drop: 14% said they were visiting friends or relatives (up significantly from 2003 to 2005), and 14% were in Las Vegas to gamble (also up significantly from 2003 to 2005). Another eleven percent (11%) mentioned a convention, trade show, or corporate meeting, while 7% were in town on other business. Five percent (5%) each of repeat visitors said they were visiting for a special event (up from past years), or just passing through (also up from past years). Three percent (3%) came for a wedding, and 2% came for a casino tournament (up from past years).

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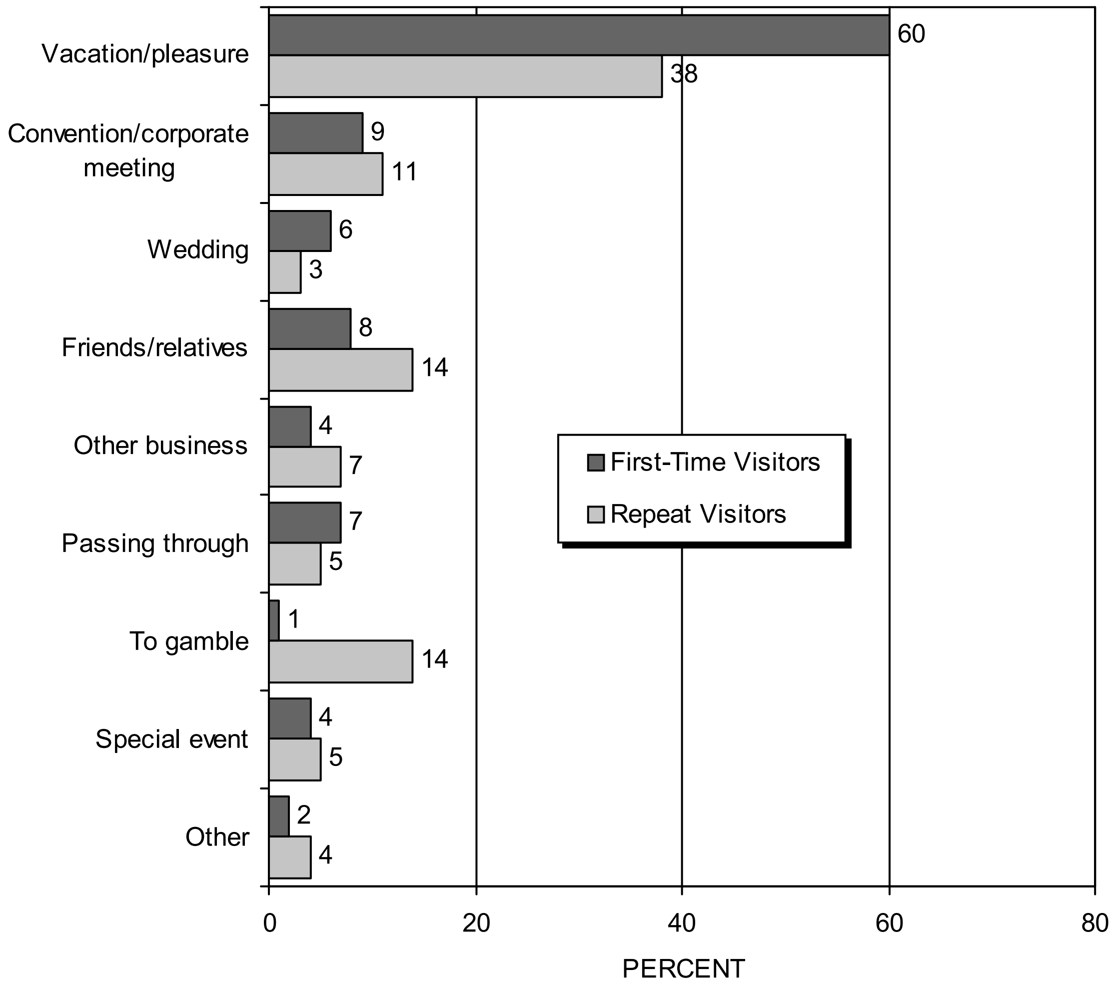
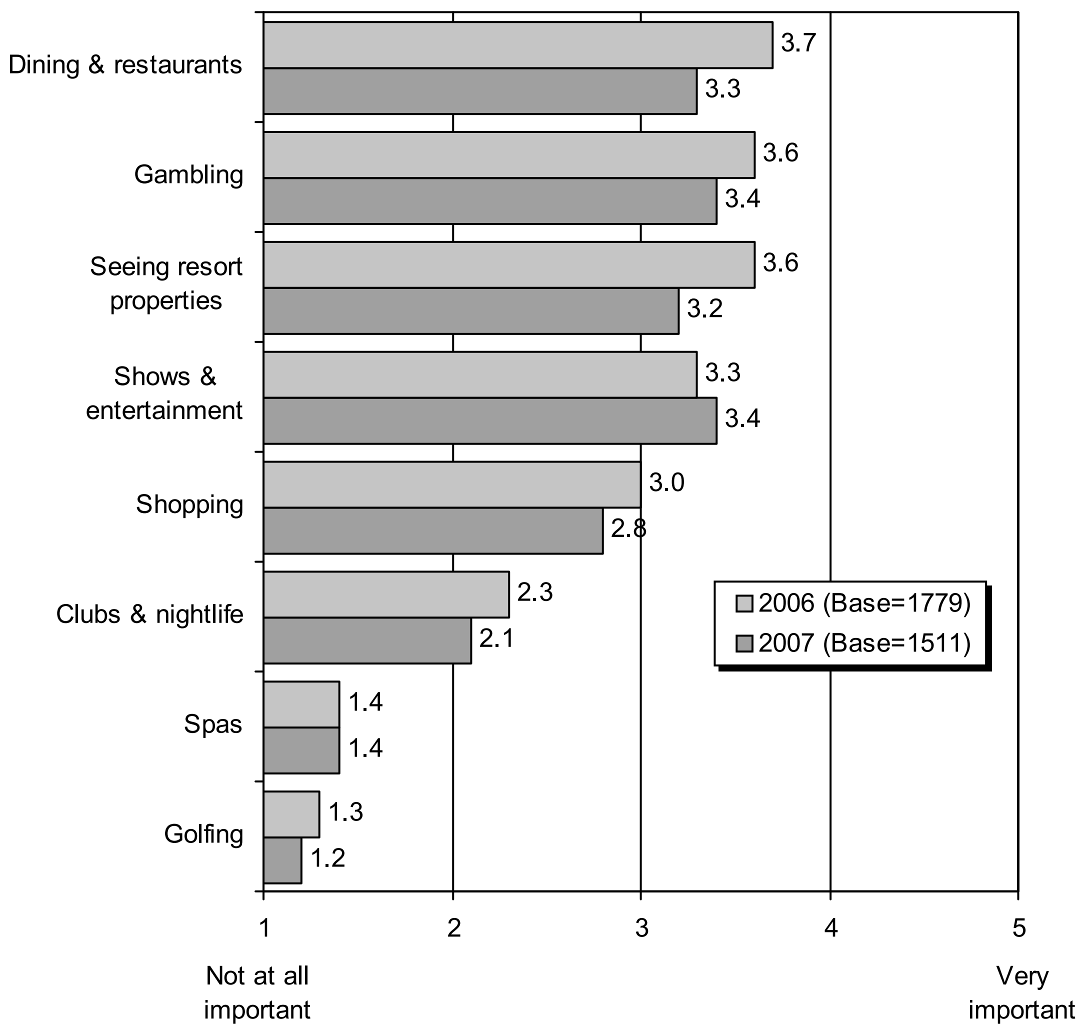
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 8
Primary Purpose Of Current Visit
(First-Time Versus Repeat Visitors — 2007)



The primary purpose for the current visit among both first-time and repeat visitors is presented in Figure 8. First-time visitors were significantly more likely than repeat visitors to say they were visiting Las Vegas primarily for vacation or pleasure (60% vs. 38%) or to attend a wedding (6% vs. 3%). Repeat visitors were more likely than first-time visitors to say that their current trip to Las Vegas was to visit friends or relatives (14% vs. 8%) or to gamble (14% vs. 1%).

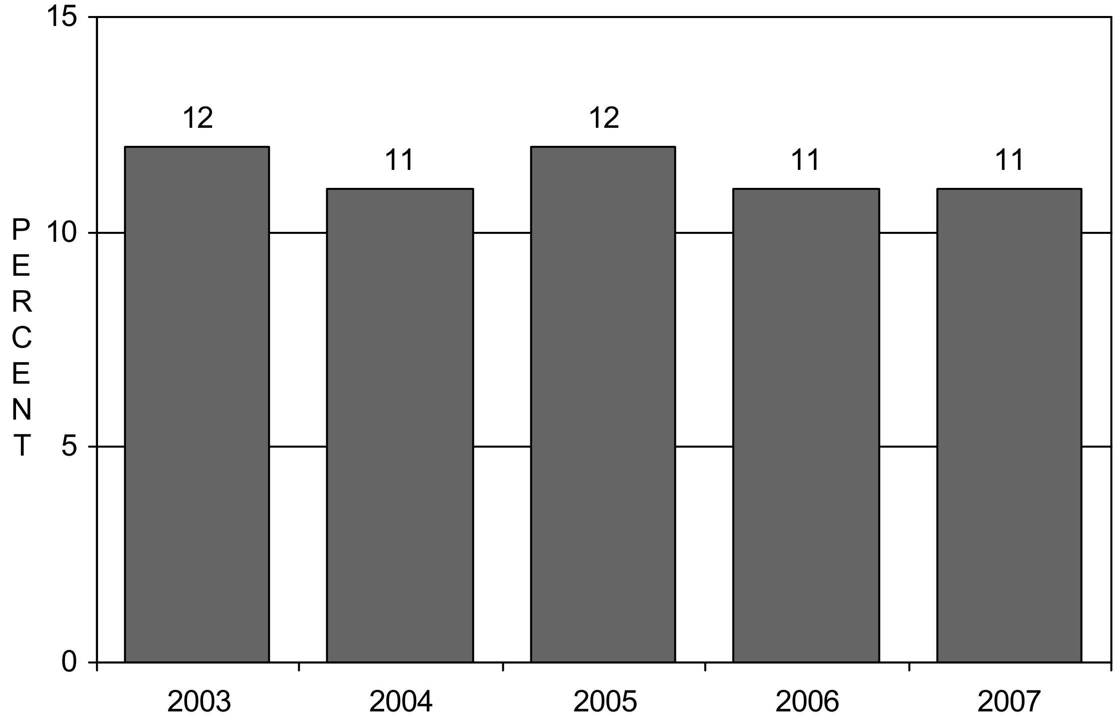
FIGURE 9
Importance of Factors in Deciding to Visit Las Vegas
(Among Vacation/Pleasure Visitors)



Beginning in 2006, vacation & pleasure visitors were asked to rate the importance of several factors in helping them decide to visit Las Vegas (Figure 9). Ratings were done using a five-point scale where one meant “not at all important” and five meant “very important.”

The most important factors were gambling and entertainment (mean score of 3.4 each), restaurants (3.3), and seeing the resorts (3.2) – followed by shopping (2.8). Of relatively less importance were nightlife (2.1), spas (1.4), and golfing (1.2). Except for entertainment and spas, all scores were down significantly from last year’s averages.

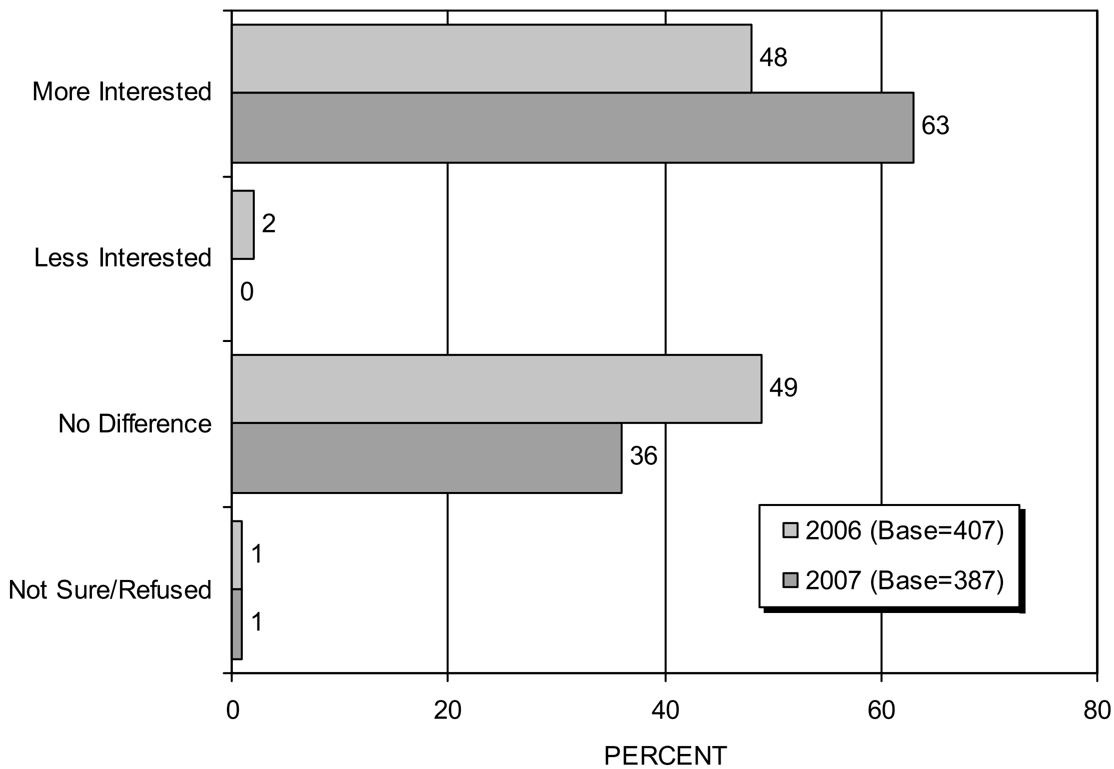
FIGURE 10
Conventions/Trade Shows/Corporate Meetings*



Visitors were asked if they had attended a convention, trade show, or corporate meeting while in Las Vegas (Figure 10). Eleven percent (11%) said they had, similar to past years.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 11
Interest in Attending Conventions, Trade Shows, or Corporate Meetings in Las Vegas
(Among Visitors Who Attended a Convention, Trade Show, or Corporate Meeting)

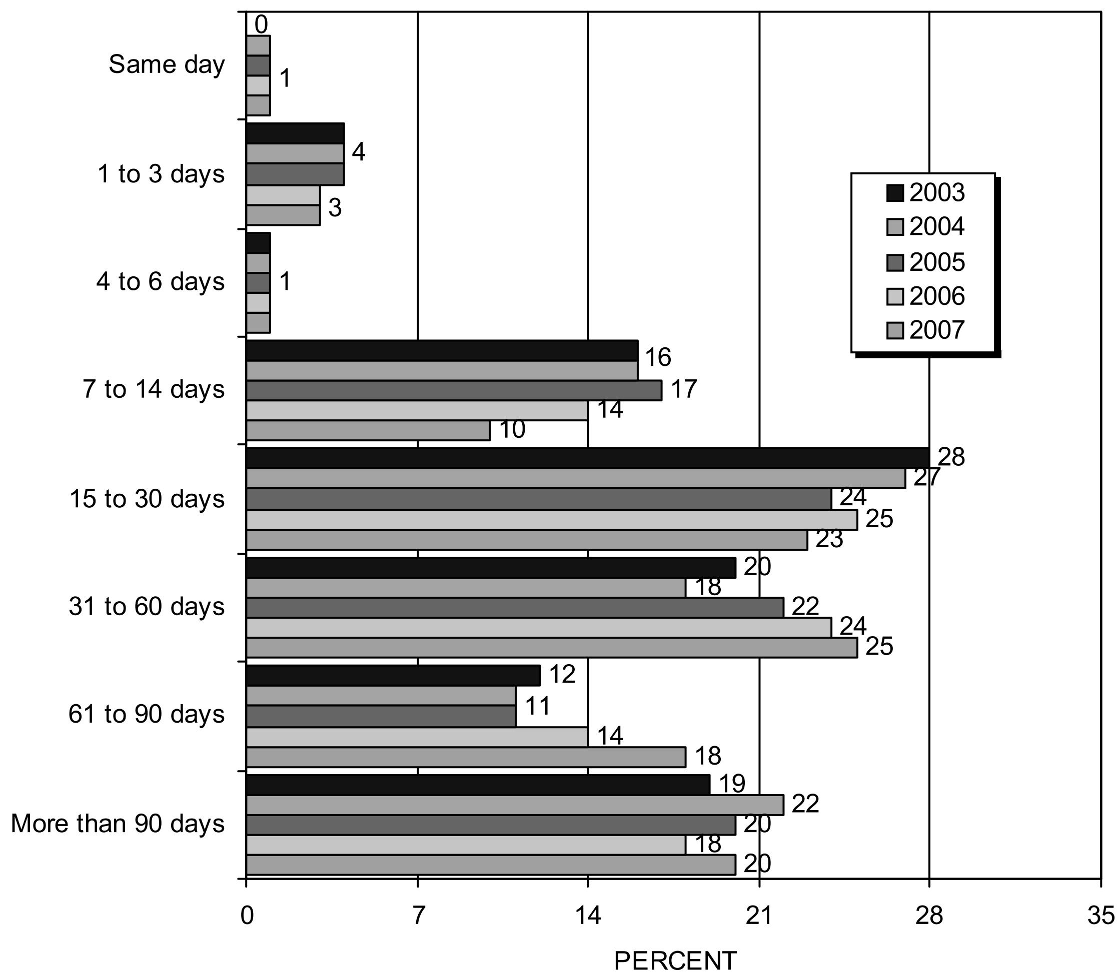


Beginning in 2006, convention visitors were asked if holding a convention in Las Vegas made them more or less interested in attending the convention — or if it made no difference (Figure 11). In 2007 63% said having the convention in Las Vegas made them more interested in attending, up from 48% in 2006. Thirty-six percent (36%) said it made no difference, down from 49% who gave this response last year. Less than one percent said that having the convention in Las Vegas made them less interested in attending, down from 2% who gave this response last year.

TRAVEL PLANNING

Travel planning varied broadly — from same-day planning to planning more than 90 days in advance. Nearly two-thirds (63%) of visitors in 2007 planned their trip to Las Vegas more than one month in advance (Figure 12), an increase from 51% in 2003, 51% in 2004, 53% in 2005, and 56% last year.

FIGURE 12
Advance Travel Planning*



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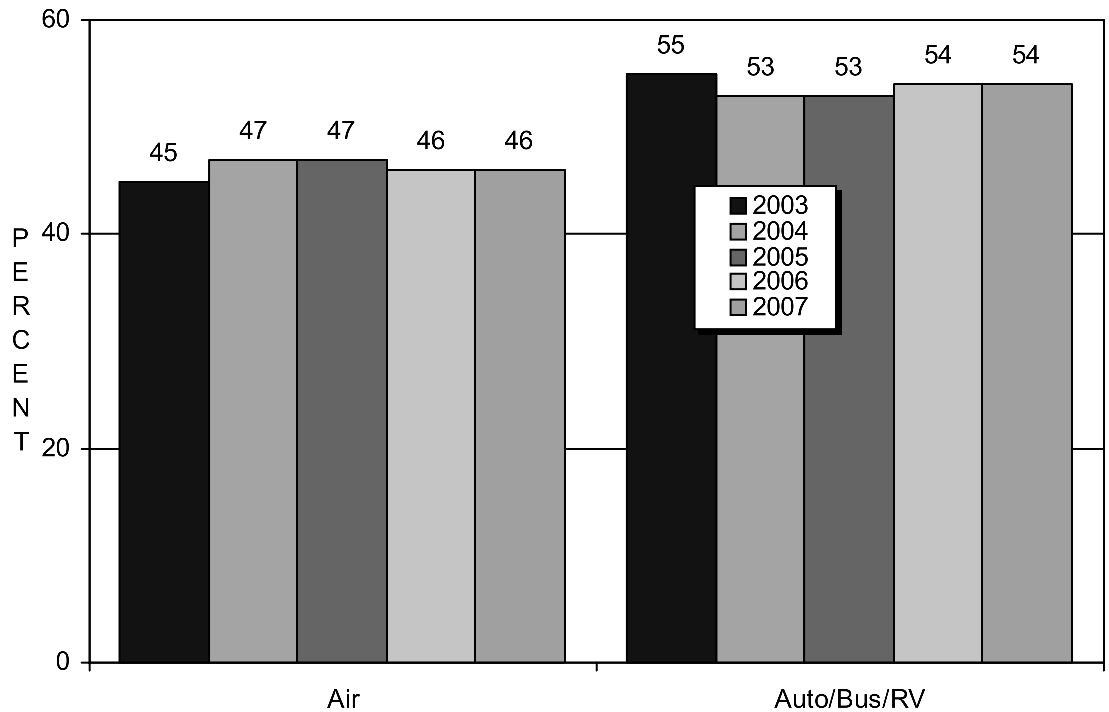
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 13
Transportation To Las Vegas*



Forty-six percent (46%) of visitors to Las Vegas in 2007 arrived by air, consistent with past years, and 54% arrived by ground transportation (Figure 13).

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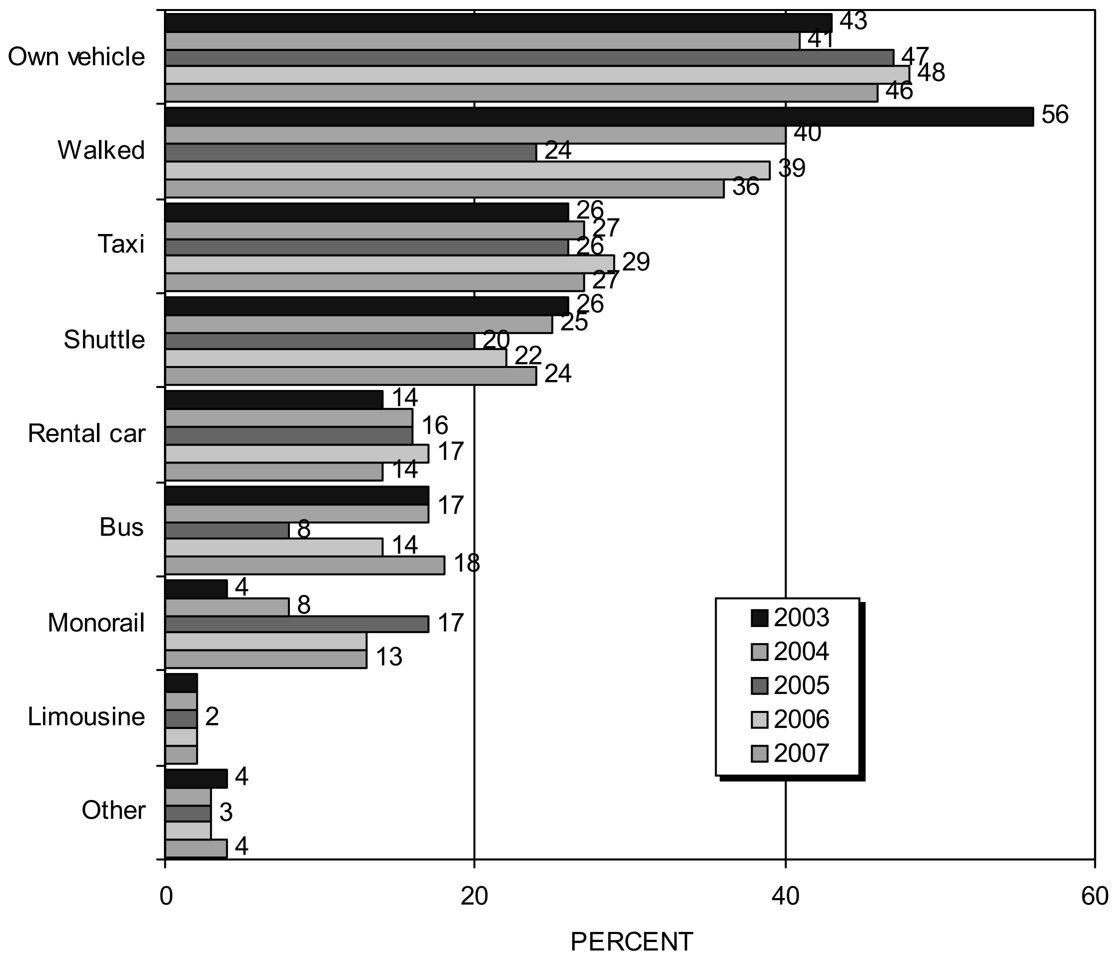
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 14
Local Transportation*



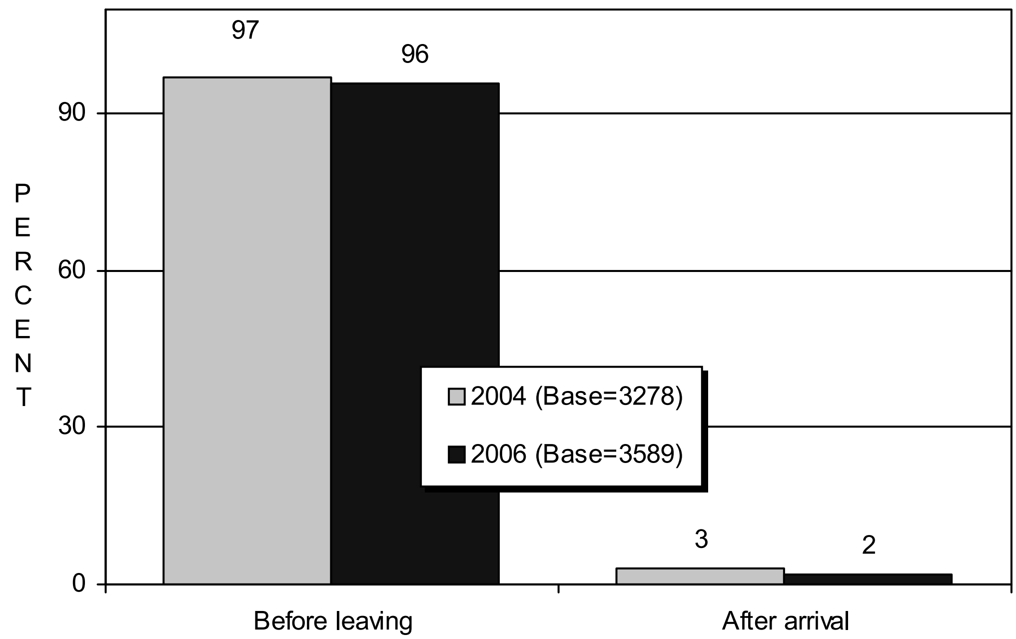
Forty-six percent (46%) of visitors said that they used their own vehicle when traveling around Las Vegas, a significant increase over 43% in 2003 and 41% in 2004 (Figure 14). Thirty-six percent (36%) of visitors volunteered that they walked while in Las Vegas, up from 24% in 2005. Twenty-seven percent (27%) reported taking a taxi, while 24% reported using a hotel shuttle (up from 20% in 2005), and 14% used a rental car (down from 16% in 2005 and 17% last year). Eighteen percent (18%) of visitors reported taking a bus (up from 8% in 2005, and 14% last year).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Multiple responses to this question were permitted.

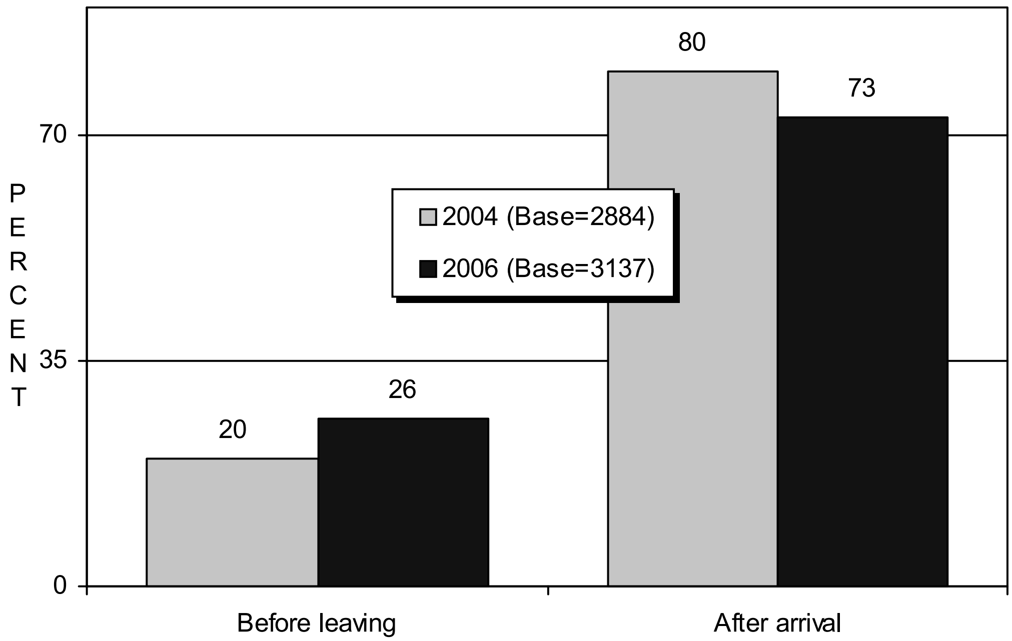
FIGURE 15
When Decided Where To Stay*
(Among Those Who Stayed Overnight – Asked Every Other Year)



Most visitors (96%) decided where to stay before leaving home, consistent with 2004 (Figure 15).

* This question is asked every other year and was not asked in 2003, 2005, or 2007.

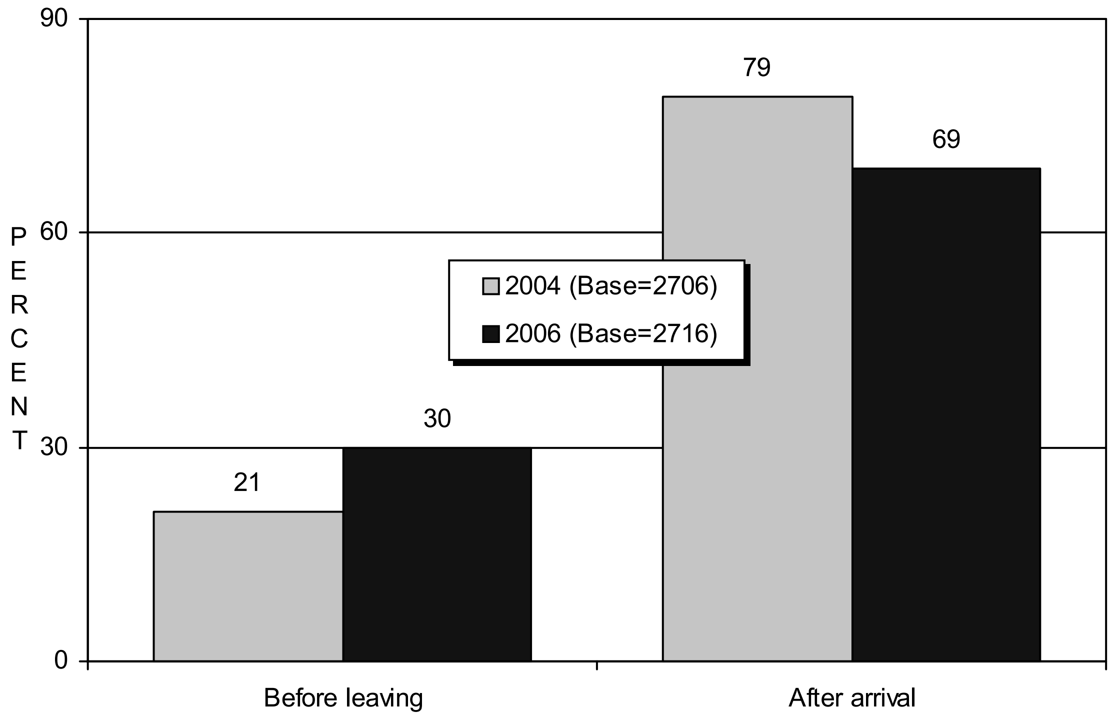
FIGURE 16
When Decided Where To Gamble*
(Among Those Who Gambled – Asked Every Other Year)



Most visitors (73%) decided where to gamble after arriving in Las Vegas, down significantly from 80% in 2004 (Figure 16). By contrast, 26% of visitors decided where to gamble before leaving home, up from 20% in 2004.

* This question is asked every other year and was not asked in 2003, 2005, or 2007.

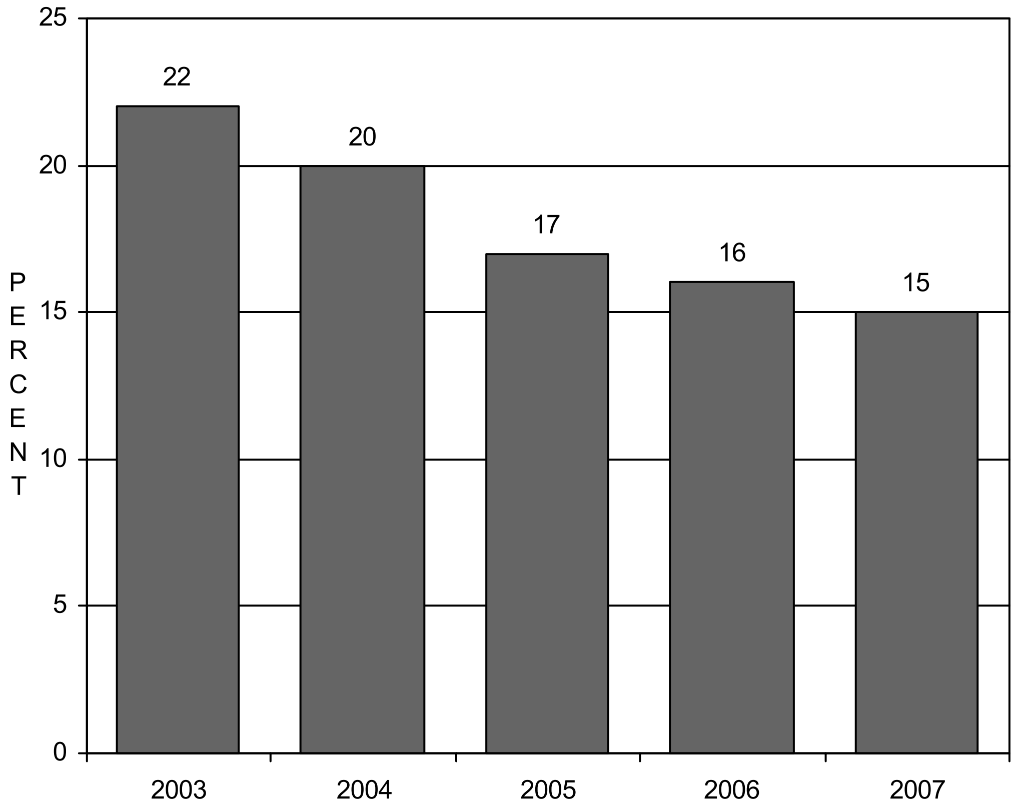
FIGURE 17
When Decided Which Shows To See*
(Among Those Who Saw Shows – Asked Every Other Year)



While most visitors (69%) decided which shows to see after arrival (down from 79% in 2004), three in ten (30%) decided before leaving home (up significantly from 21% in 2004) (Figure 17).

* This question is asked every other year and was not asked in 2003, 2005, or 2007.

FIGURE 18
Travel Agent Assistance*

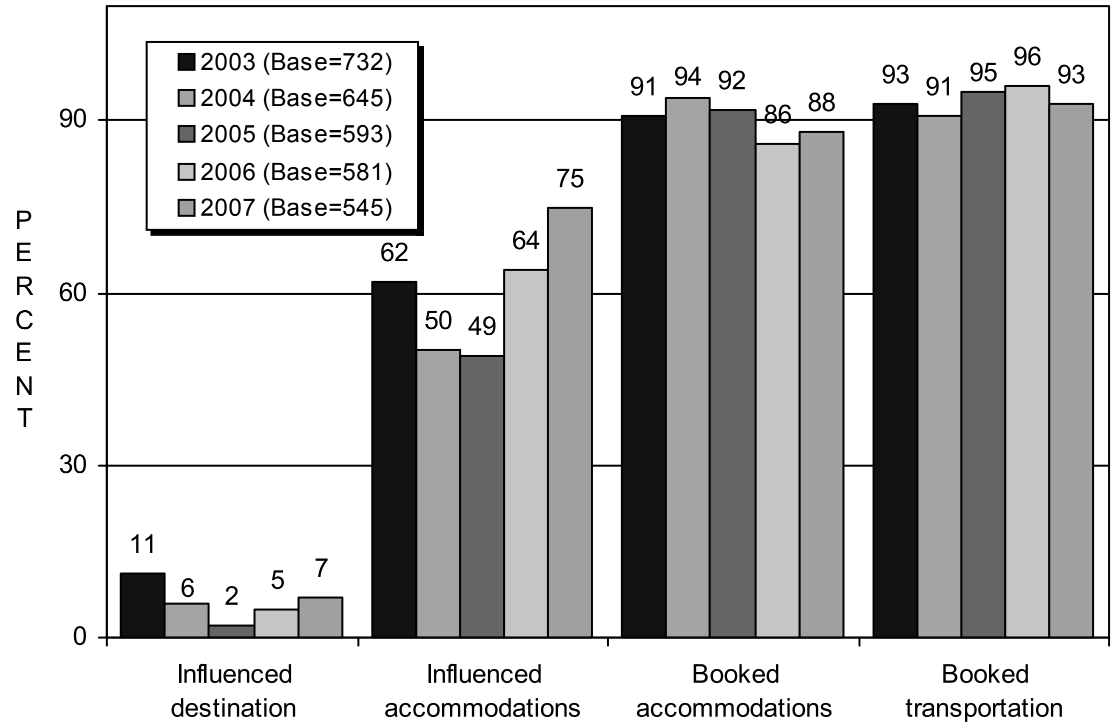


The proportion of visitors who reported using a travel agent to plan their trip to Las Vegas (15%) was down significantly from 22% in 2003 and 20% in 2004 (Figure 18).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

FIGURE 19
Travel Agent Influence And Use*
(Among Those Who Used A Travel Agent)



Among those visitors who used a travel agent to plan their trip to Las Vegas, 88% said the travel agent booked their accommodations (similar to last year, but down from 94% in 2004, and 92% in 2005), and 93% said the travel agent booked their transportation (Figure 19).

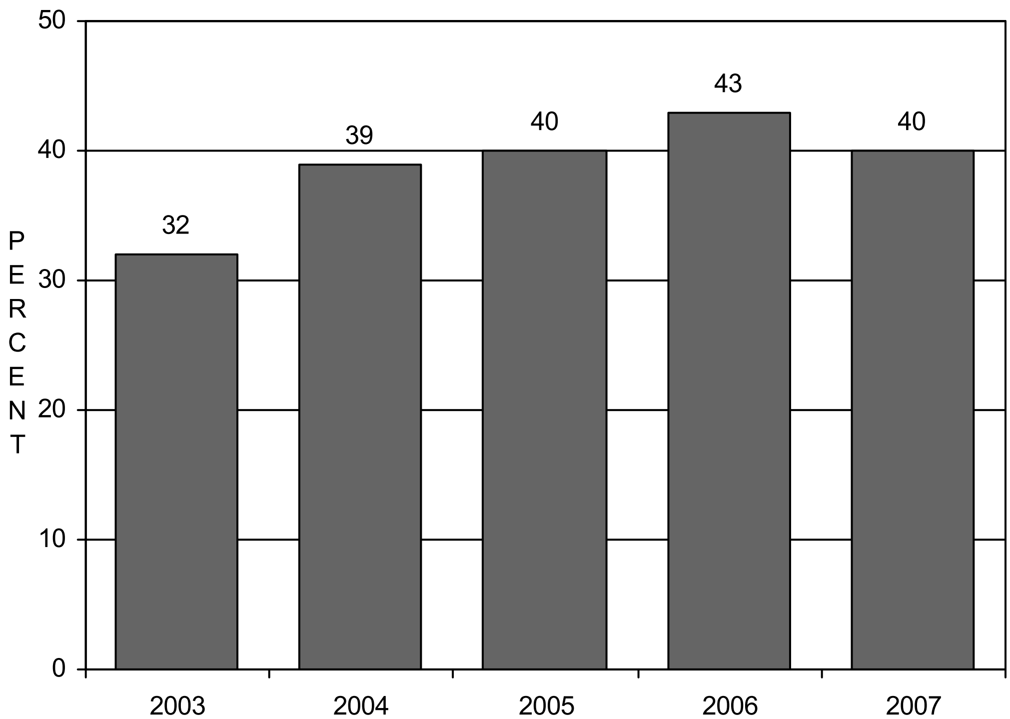
Three in four visitors (75%) said their travel agent influenced their choice of accommodations, up from all prior years. Seven percent (7%) said the travel agent influenced their choice of destination, up from 2% in 2005.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

FIGURE 20
Whether Used The Internet To Plan Trip*

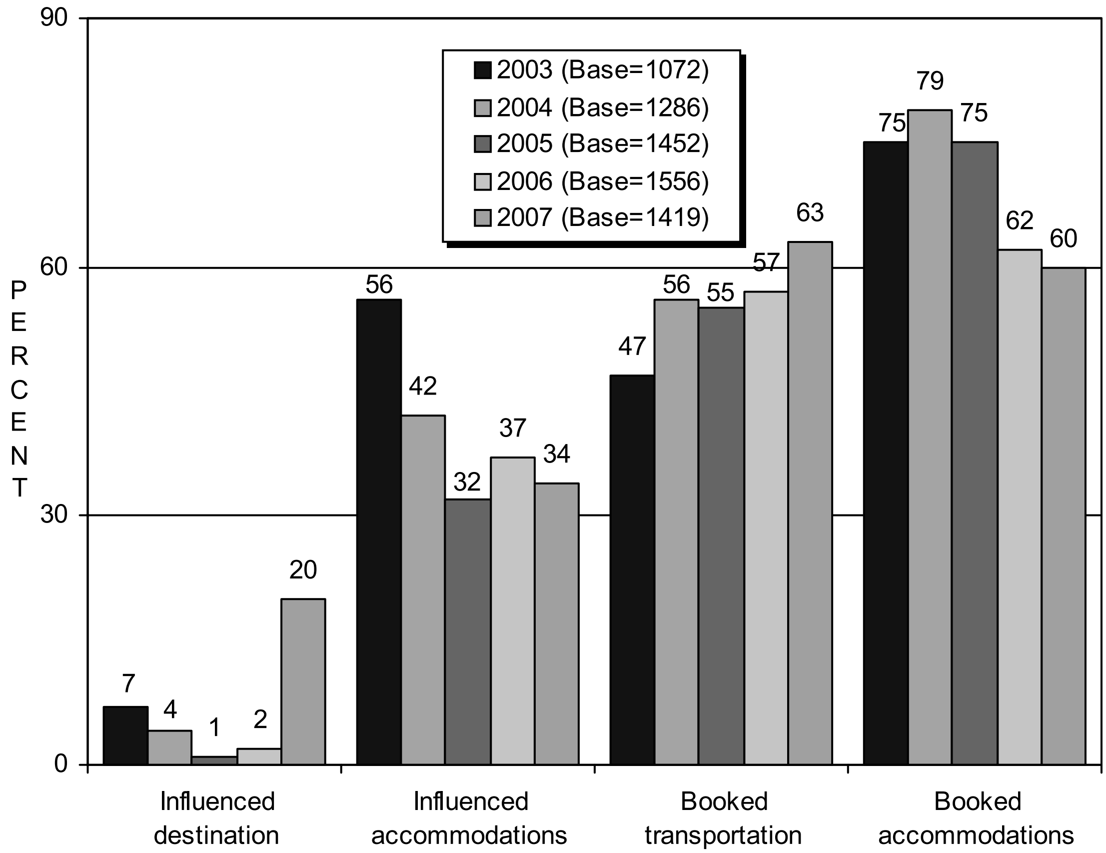


Visitors were asked if they used the Internet to plan their trip, and 40% said yes, down from 43% in 2006 (Figure 20).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only “yes” responses are reported in this chart.

FIGURE 21
Internet Influence And Use*
(Among Those Who Used The Internet To Plan Trip)



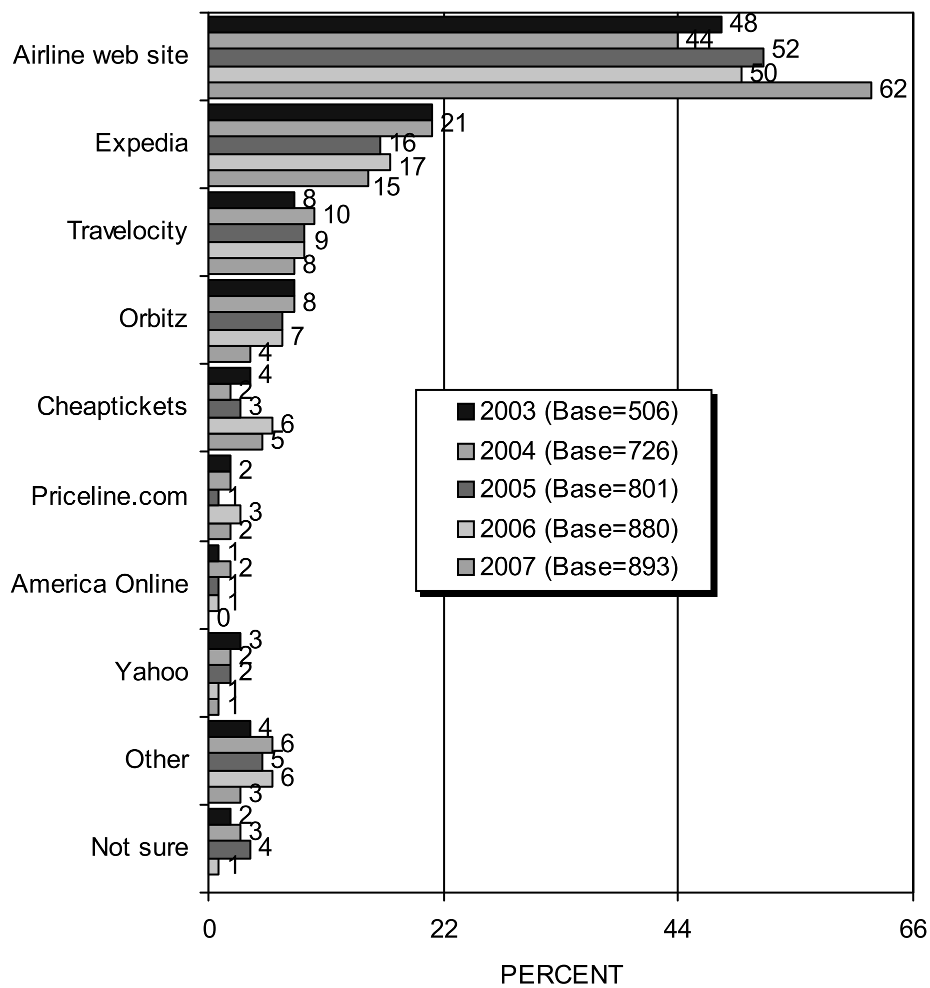
More than six in ten visitors (63%) who used the Internet to plan their trip to Las Vegas said they booked their transportation online, up significantly from all prior years (Figure 21). Sixty percent (60%) said they booked their accommodations online, similar to last year, but down significantly from 75% in 2003, 79% in 2004, and 75% in 2005. The proportion of visitors who said the Internet influenced their choice of accommodations was 34%, down from 56% in 2003 and 42% in 2004. One in five visitors (20%) said information on the Internet influenced their decision to visit Las Vegas, up significantly from all prior years.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

FIGURE 22
Website Used To Book Transportation*
(Among Those Who Booked Their
Transportation To Las Vegas Online)

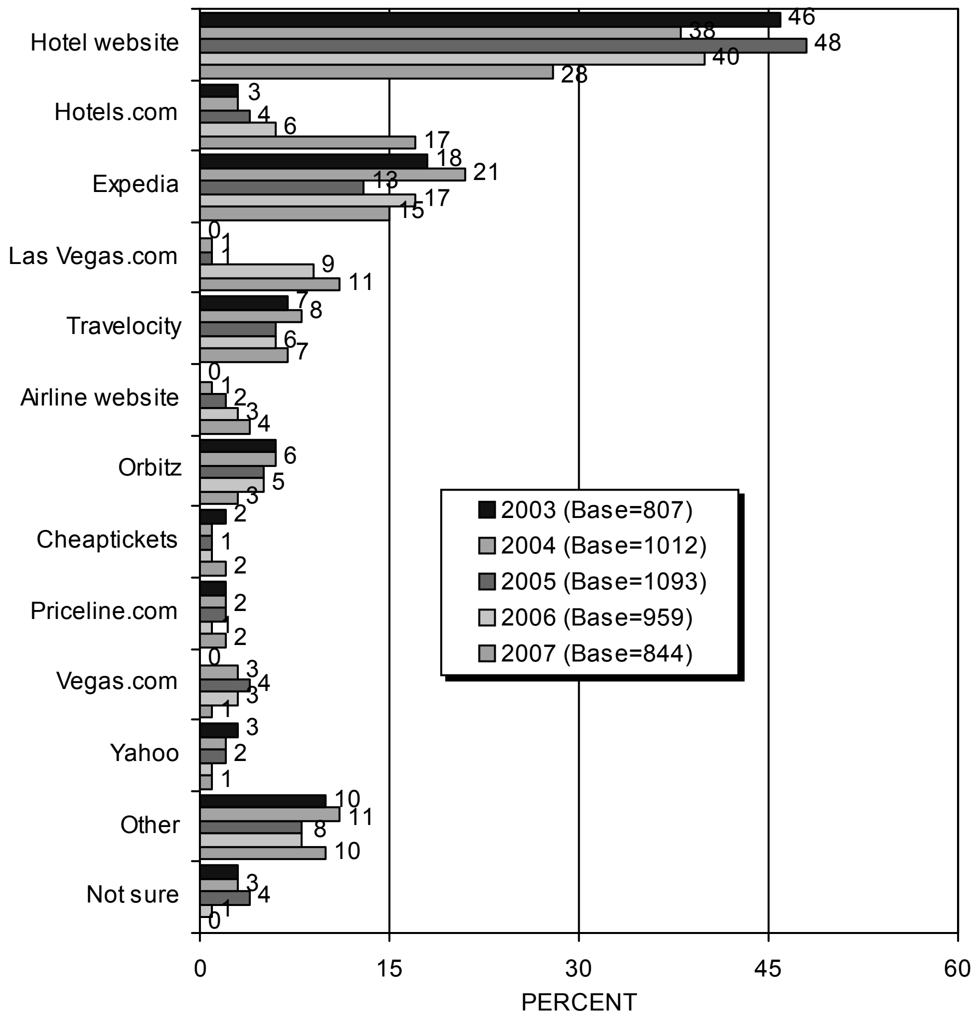


Among those who booked their transportation to Las Vegas online, 62% said they used an airline website, up significantly from all prior years (Figure 22). Fifteen percent (15%) said they used Expedia, down significantly from 21% in both 2003 and 2004. Eight percent (8%) used Travelocity, 5% said Cheaptickets, 4% said Orbitz, and 2% said Priceline. Other websites were mentioned by 2% or fewer.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 23
Website Used To Book Accommodations*
(Among Those Who Booked Their
Accommodations In Las Vegas Online)



Among those who booked their accommodations online for their current trip to Las Vegas, 28% said they used a hotel website, down from past years (Figure 23). Seventeen percent (17%) said they used Hotels.com, up from all prior years. Fifteen percent (15%) used Expedia, down from 21% in 2004. Seven percent (7%) used Travelocity, 3% used Orbitz, while the remaining visitors used a variety of other websites.

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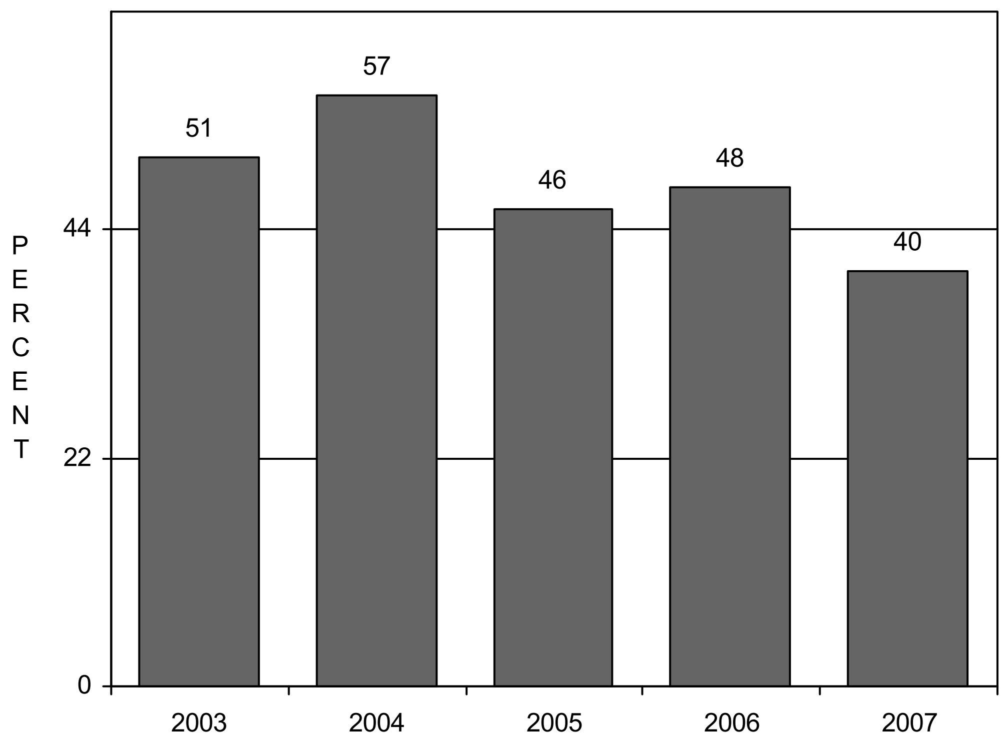
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 24
Whether Visited Downtown Las Vegas*



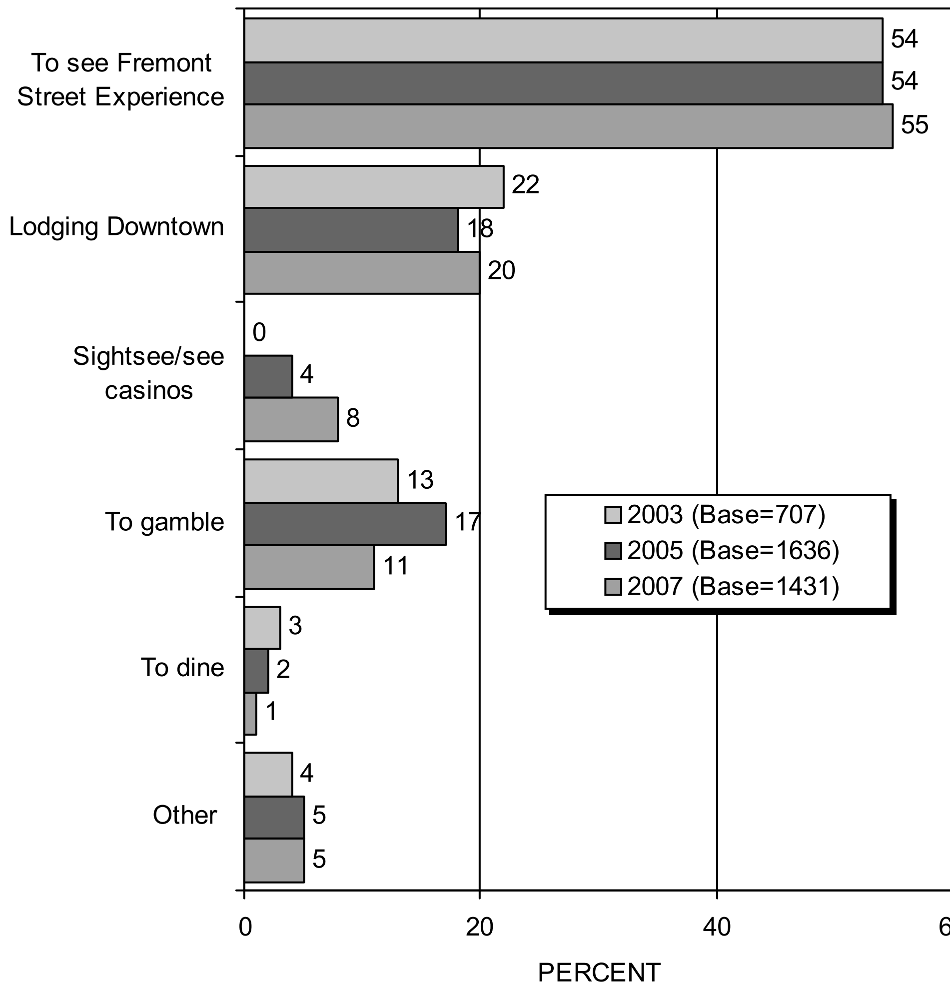
Four in ten visitors (40%) said they had visited Downtown Las Vegas on their current trip, down significantly from all prior years (Figure 24).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

FIGURE 25
Main Reason For Visiting Downtown Las Vegas*
(Among Those Who Visited Downtown — Asked Every Other Year)

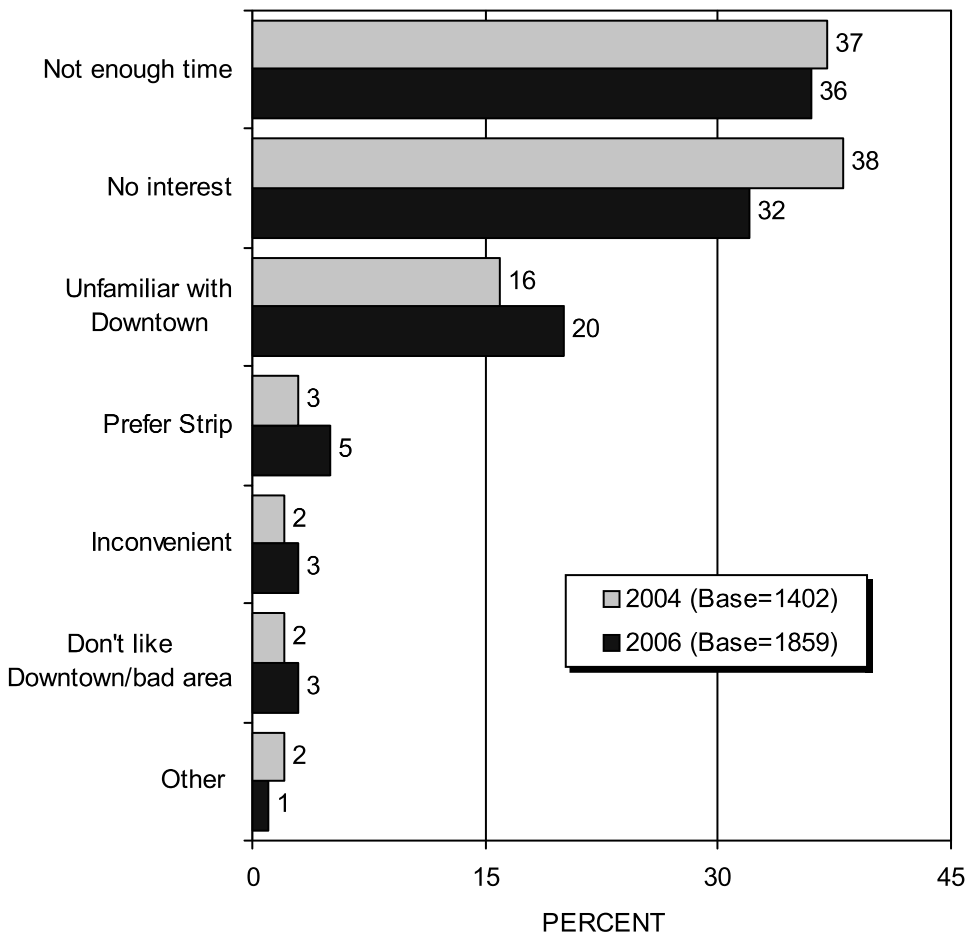


Visitors who visited Downtown Las Vegas on their current trip were asked the primary reason why they had done so (Figure 25). More than one-half (55%) said it was to see the Fremont Street Experience, similar to past years. One in five visitors (20%) said they were lodging Downtown, and 11% said they went Downtown primarily to gamble, down from 17% in 2005. The number who said they visited Downtown primarily to sightsee was 8%, up from less than 1% in 2003 and 4% in 2005.

---

* This question is asked every other year and was not asked in 2004 or 2006. In this calendar year report, the data reported for 2003 is from January through June of that year.

FIGURE 26
Main Reason For Not Visiting Downtown Las Vegas*
(Among Those Who Did Not Visit Downtown —
Asked Every Other Year)

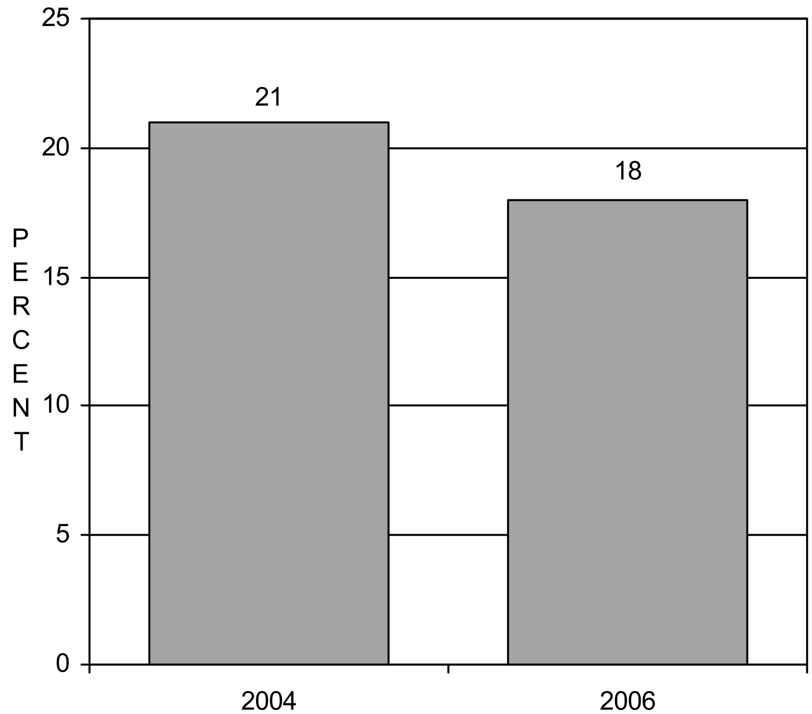


Visitors who had not visited Downtown Las Vegas on their current trip were asked the primary reason why they had not done so (Figure 26). More than one in three (36%) said it was because they did not have enough time, while 32% said they were not interested in Downtown (a decrease from 38% in 2004). One in five (20%) said they were unfamiliar with Downtown, an increase from 16% in 2004. Five percent (5%) of visitors said they prefer the Strip area, an increase from 3% in 2004. Three percent (3%) each said they did not go Downtown because it was inconvenient or because they did not like the Downtown area.

---

* This question is asked every other year and was not asked in 2003, 2005, or 2007.

FIGURE 27
Visits To Nearby Places*
(Asked Every Other Year)



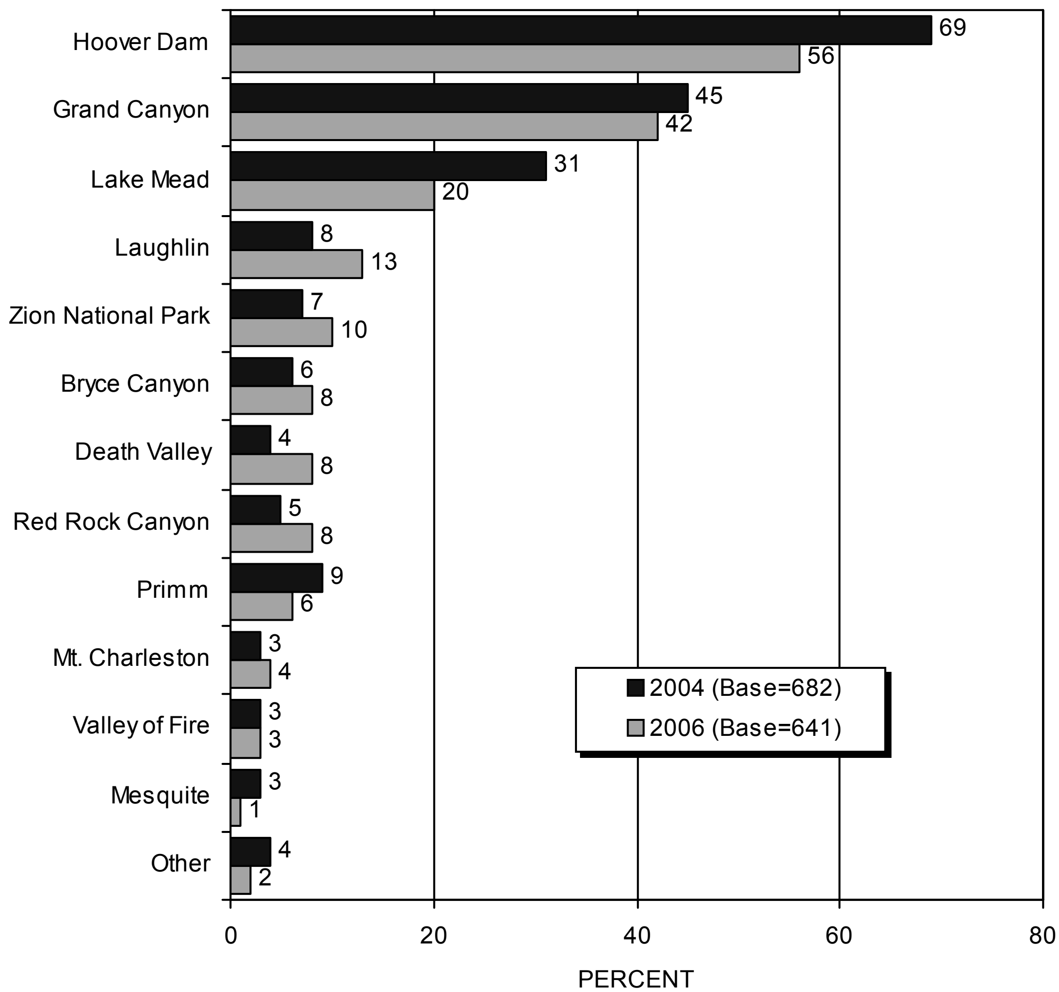
Visitors were asked if they visited any nearby places before or after their trip to Las Vegas (Figure 27). Eighteen percent (18%) of visitors said they had, down from 21% in 2004.

---

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

This question is asked every other year and was not asked in 2003, 2005, or 2007.

FIGURE 28
Other Nearby Places Visited*
(Among Those Who Planned to Visit Other Places – Asked Every Other Year)



Visitors were asked what other nearby destination they had visited, or planned to visit (Figure 28). In 2006 visitors were more likely to say they visited Laughlin (13% vs. 8%) and Death Valley (8% vs. 4%) – but they were less likely to say they visited Hoover Dam (56% vs. 69%) and Lake Mead (20% vs. 31%).

---

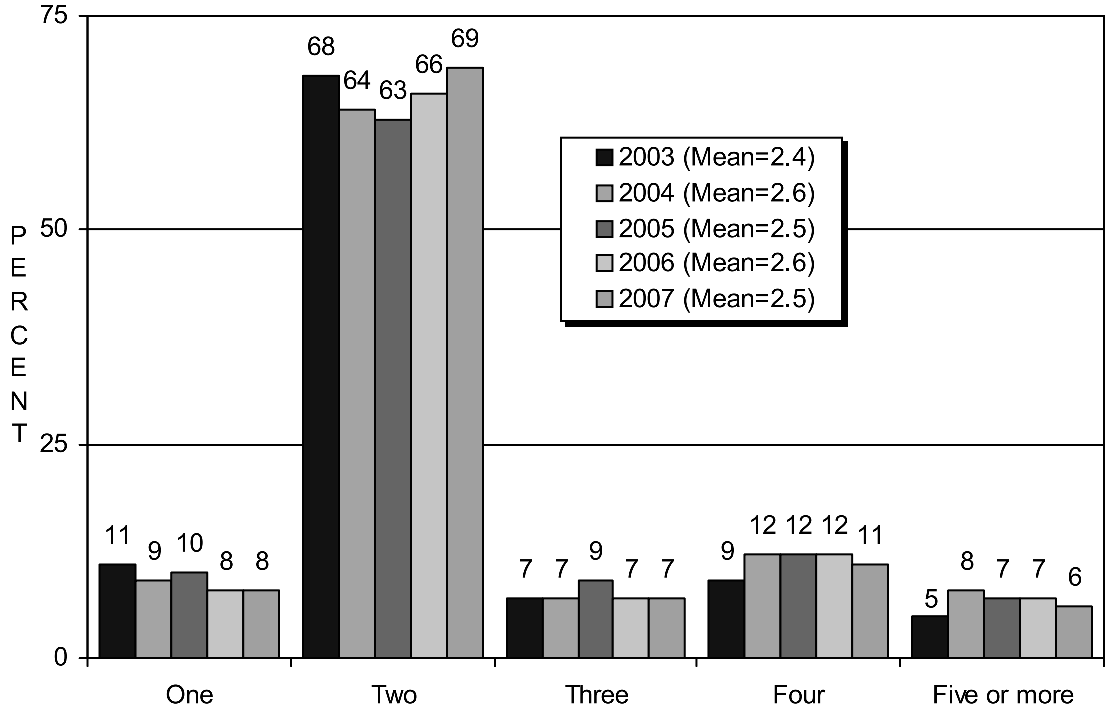
* Multiple responses were permitted.

This question is asked every other year and was not asked in 2003, 2005, or 2007.

TRIP CHARACTERISTICS AND EXPENDITURES

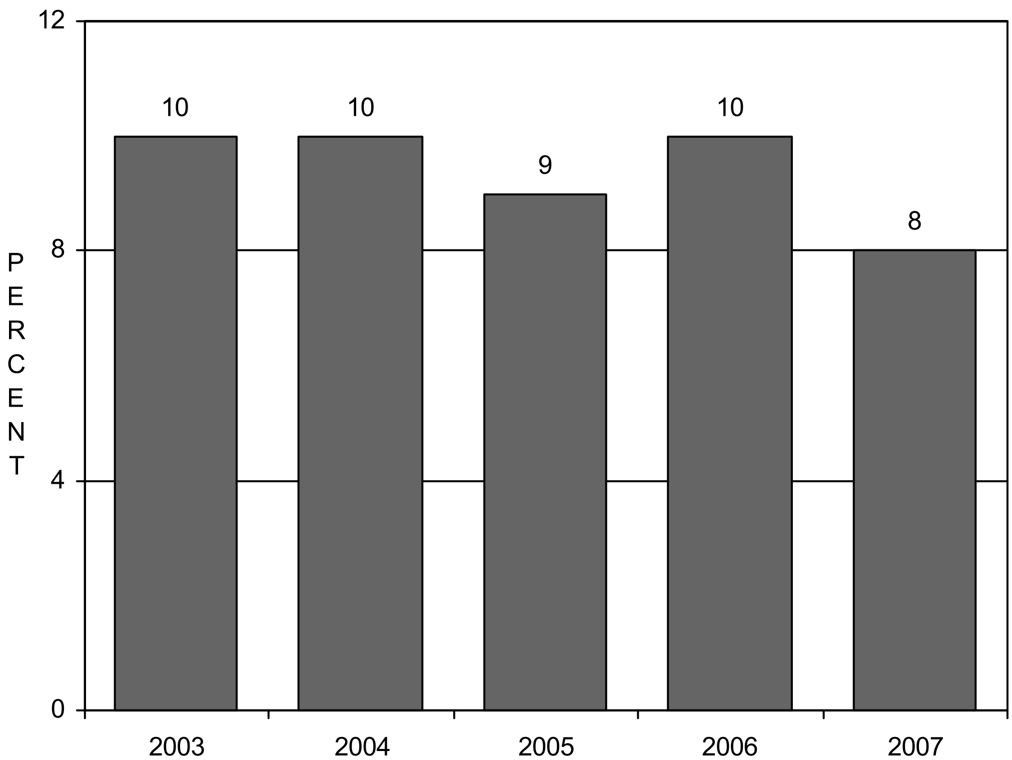
As in past years, the majority of visitors (69%) traveled in parties of two (Figure 29). Seven percent (7%) said they were in a party of three, while 11% were in a party of four, and 6% were in a party of five or more. Eight percent (8%) of visitors traveled alone, down from 10% in 2005. The average party size in 2007 was 2.5 persons, similar to 2004 to 2006, but up significantly from 2.4 in 2003.

FIGURE 29
Adults In Immediate Party*



* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

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



We asked visitors whether they had any people under the age of 21 traveling with them in their immediate party (Figure 30). Eight percent (8%) said they did, down from 10% in 2003, 2004, and 2006.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 31
Nights Stayed*

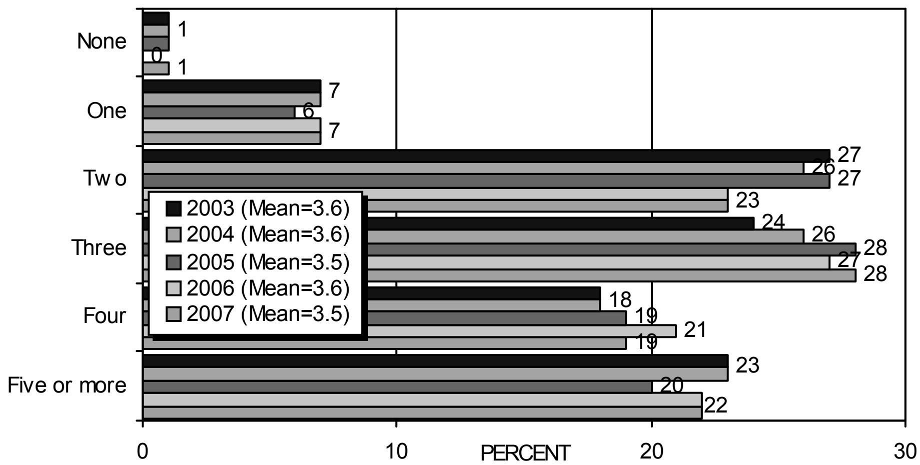
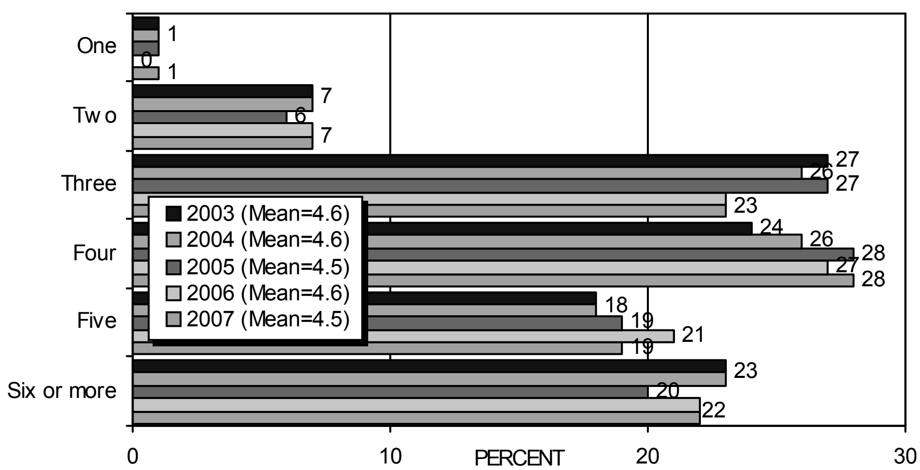


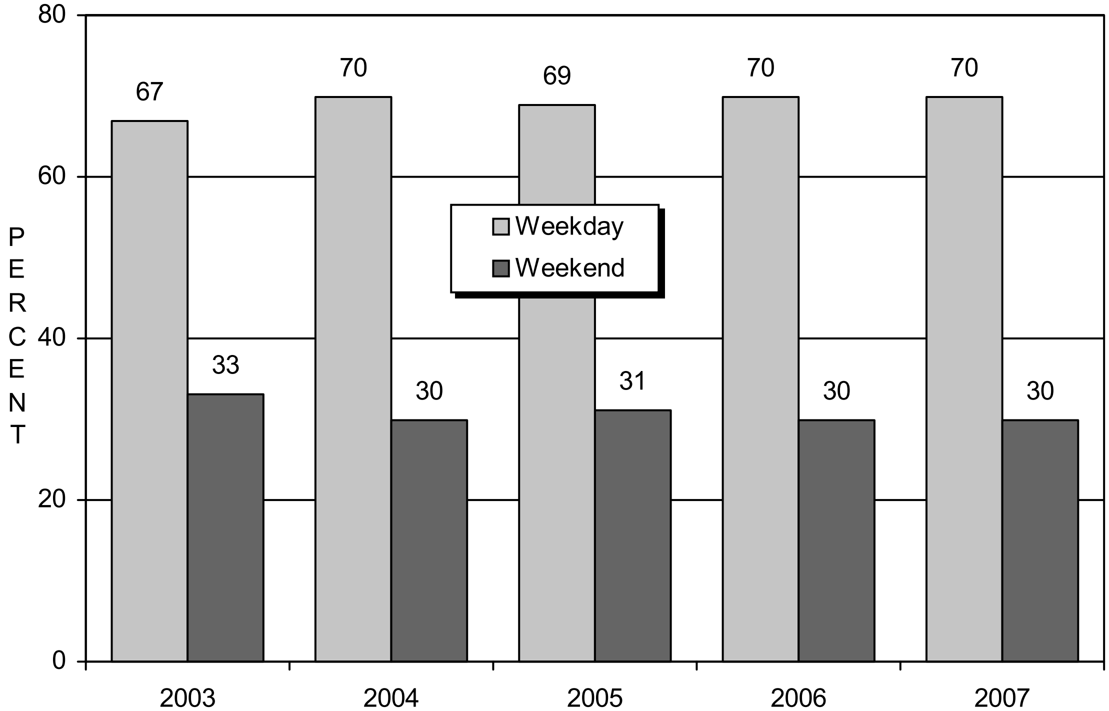
FIGURE 32
Days Stayed*



In 2007, visitors stayed an average of 3.5 nights and 4.5 days in Las Vegas -— consistent with past averages (Figures 31 and 32).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 33
Weekend Versus Weekday Arrival*



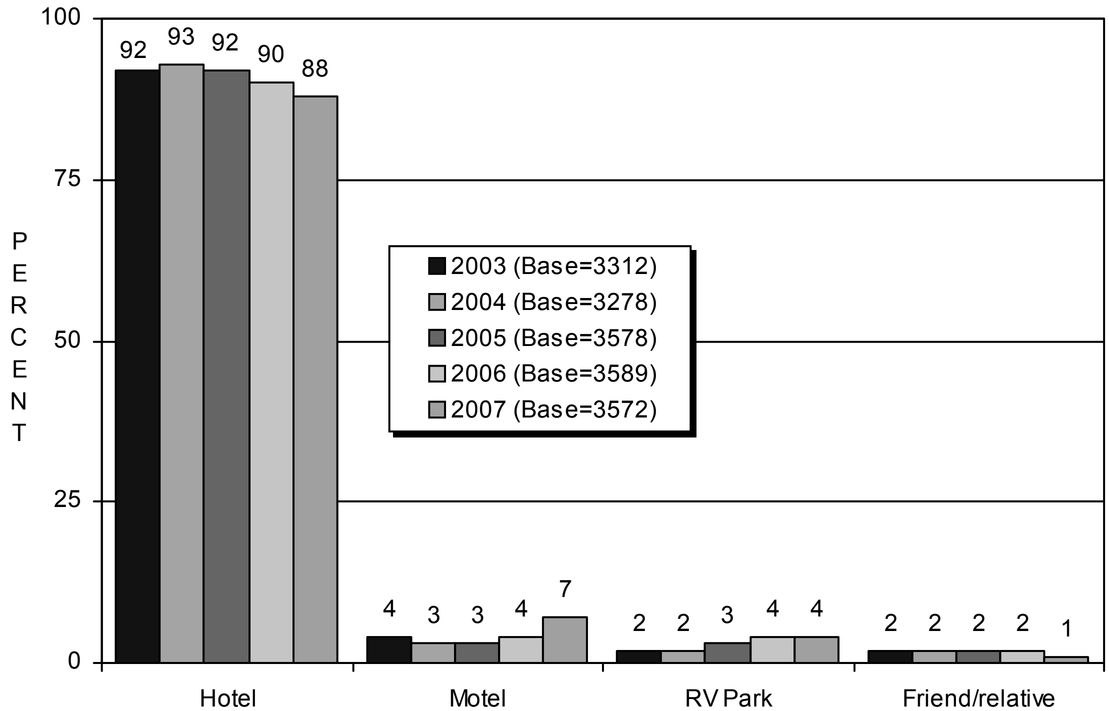
As in the past, about three in ten (30%) visitors arrived in Las Vegas on a weekend, while about seven in ten (70%) arrived on a weekday (Figure 33).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Weekday is defined as Sunday through Thursday. *Weekend* is defined as Friday and Saturday.

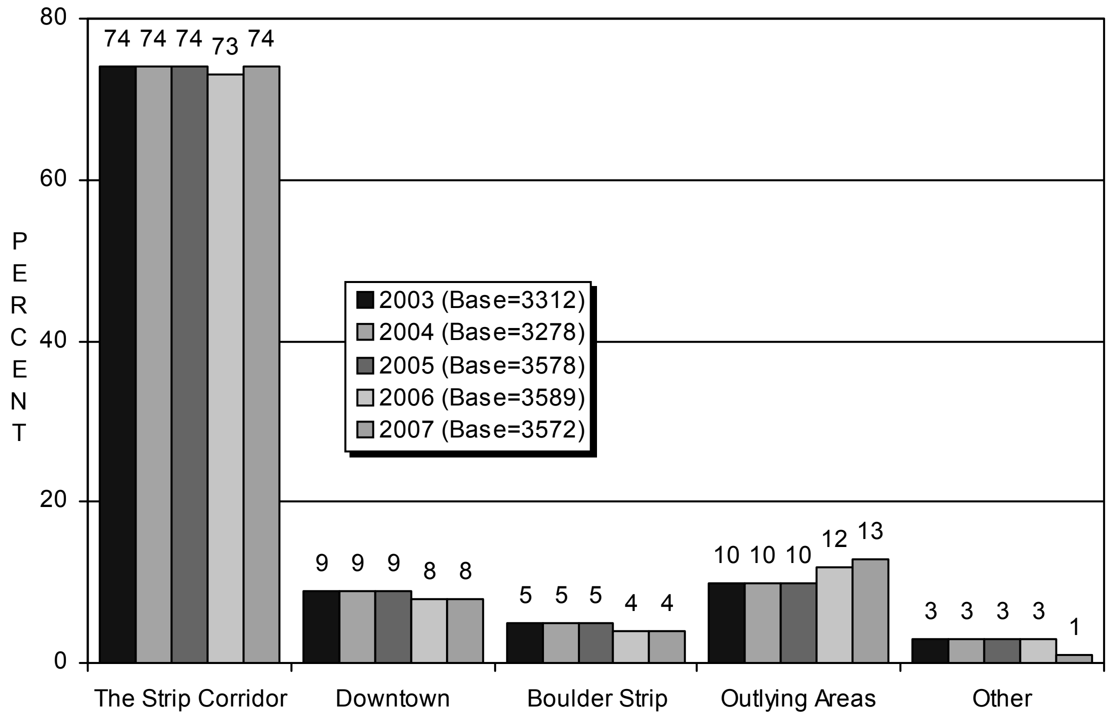
FIGURE 34
Type Of Lodging*
(Among Those Who Stayed Overnight)



Among visitors who stayed in Las Vegas overnight, 88% stayed in a hotel, 7% in a motel (up from past years), 4% in an RV park, and 1% with friends or relatives (Figure 34).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

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

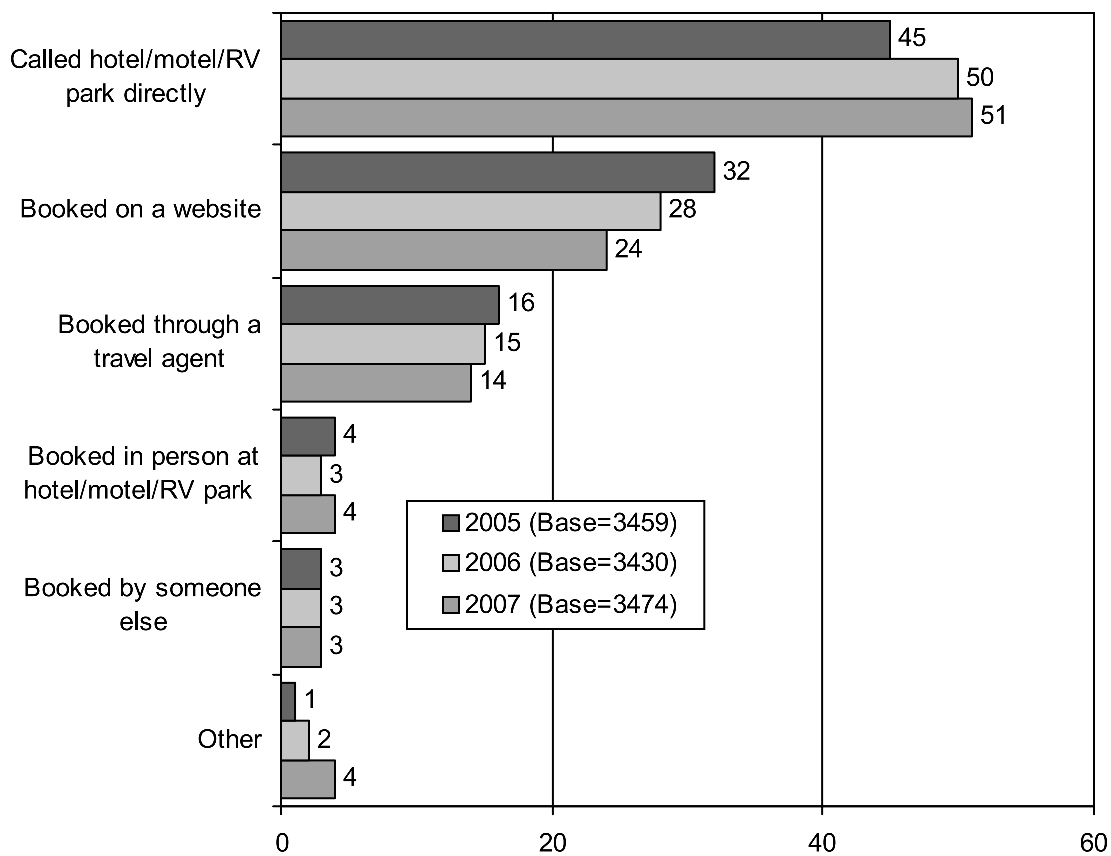


In terms of lodging location (among those who stayed overnight), 74% stayed in a property on the Strip Corridor†, 8% stayed Downtown, and 4% stayed on the Boulder Strip. Thirteen percent (13%) stayed in outlying parts of Las Vegas (similar to last year, but an increase from 10% each from 2003 to 2005), and 1% stayed in other areas (Figure 35).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

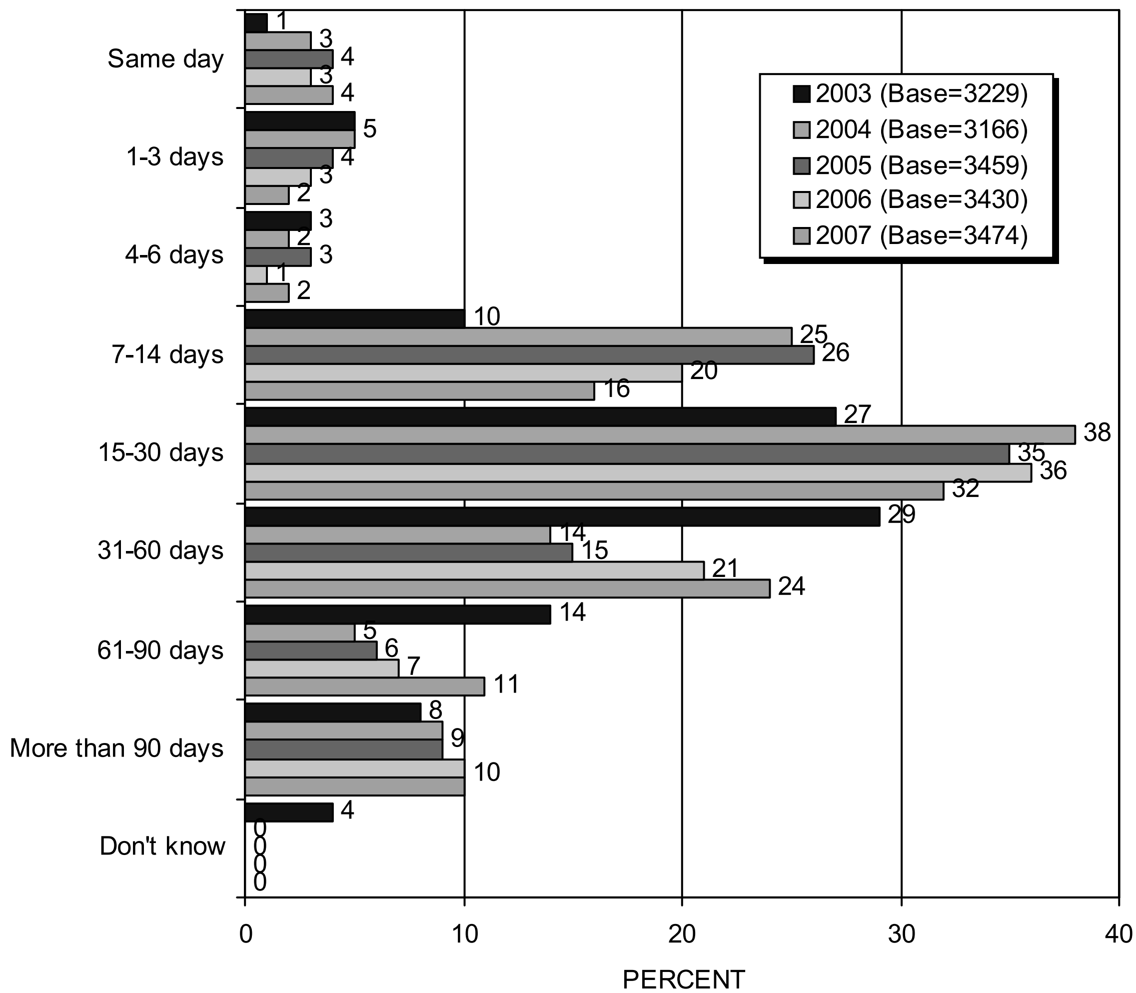
† The Strip Corridor includes properties located directly on Las Vegas Boulevard South, as well as properties near the Strip, between Valley View Road and Paradise Road.

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



Beginning in 2005, visitors who stayed at a hotel, motel, or RV park were asked how they booked their accommodations in Las Vegas (Figure 36). In 2007 just over one-half (51%) said they called the hotel, motel, or RV park directly (up significantly from 45% in 2005), 24% said they used a website (down significantly from 32% in 2005 and 28% last year), while 14% said they booked through a travel agent. Four percent (4%) said they booked in person at the hotel, motel, or RV park they stayed at, and 3% said they did not know how their accommodations were booked because someone else booked them.

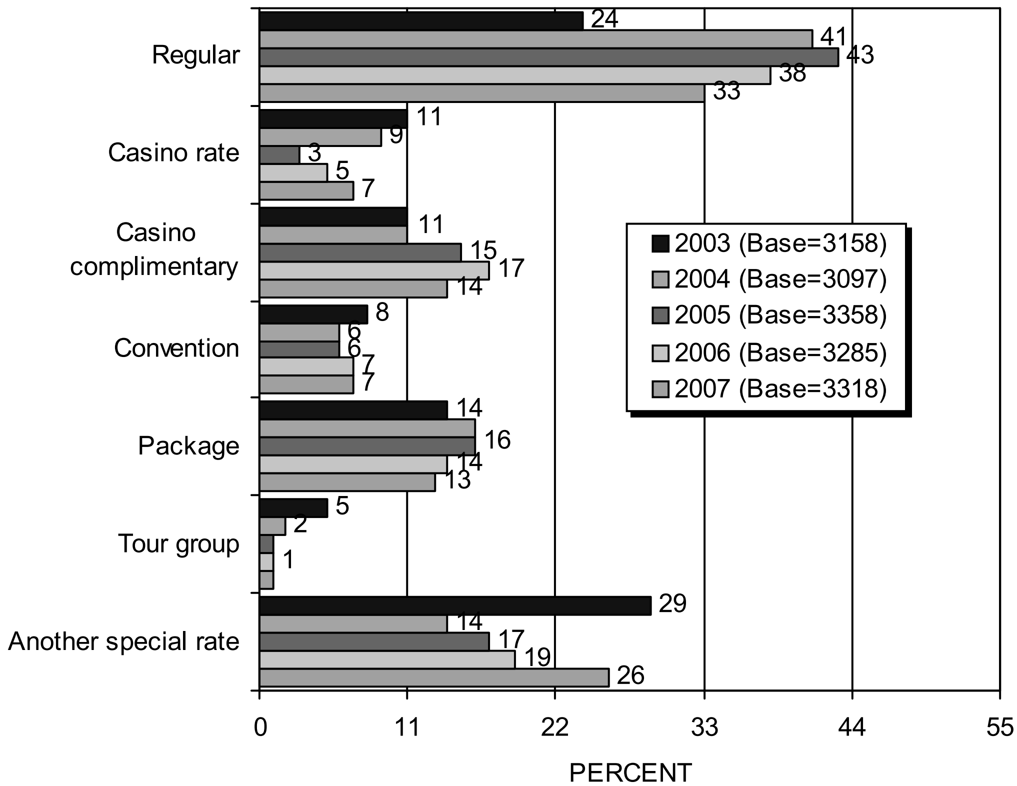
FIGURE 37
Advance Booking Of Accommodations*
(Among Those Who Stayed In A Hotel/Motel/RV Park)



We asked those staying in a hotel, motel, or RV park how far in advance they had booked accommodations (Figure 37). Forty-five percent (45%) of visitors booked more than a month in advance, an increase from 28% in 2004, 30% in 2005, and 38% in 2006, but still lower than the 51% who did so in 2003. By comparison, 48% of visitors booked one week to one month in advance, down from 63% in 2004, 61% in 2005, and 56% in 2006, but significantly greater than the 37% who did so in 2003. Only 8% of visitors reported making their reservations less than one week before arrival.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

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



Visitors were shown a card describing various room rates† and were asked which type of room rate they had received (Figure 38). The proportion of visitors paying a regular room rate declined to 33%, down from 41% in 2004, 43% in 2005 and 38% last year. Fourteen percent (14%) received a casino complimentary rate, down from 17% last year, but up significantly from 11% each in 2003 and 2004, while 7% paid a casino rate (up from 3% in 2005 and 5% in 2006, but down from 11% in 2003, and 9% in 2004). Thirteen percent (13%) of visitors paid a package rate, while the proportion receiving a tour group rate (1%) was the same as 2005 and 2006, but down from both 2003 (5%) and 2004 (2%). Seven percent (7%) paid a convention rate, and the remaining 26% paid some other kind of rate, up from 14% in 2004, 17% in 2005 and 19% last year.

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* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

† For an exact description of the room rates as presented to respondents, see "Card A" at the end of the aggregate results in the appendix to this report.

FIGURE 39
Room Rate by Booking Method
(2007)

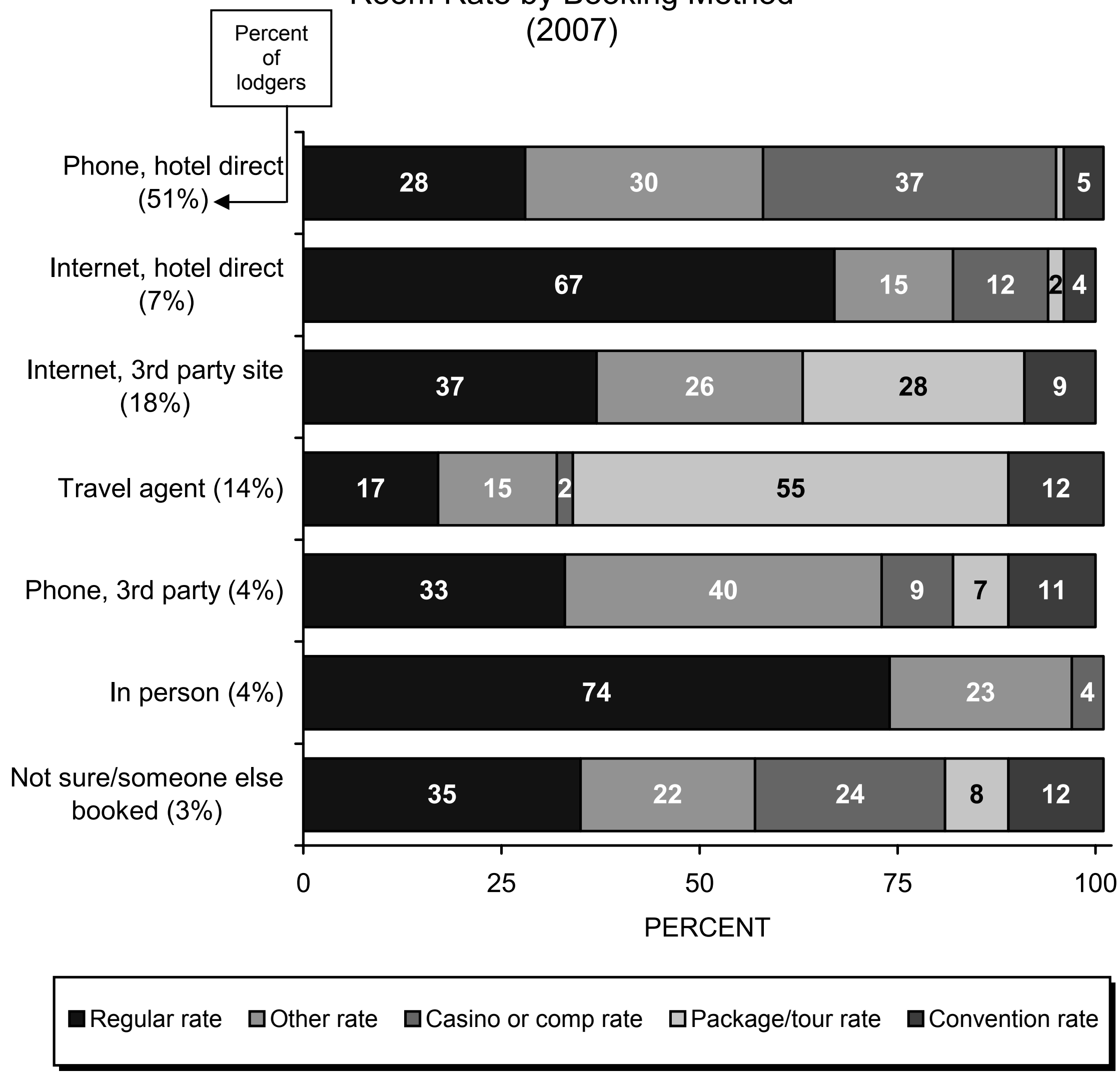
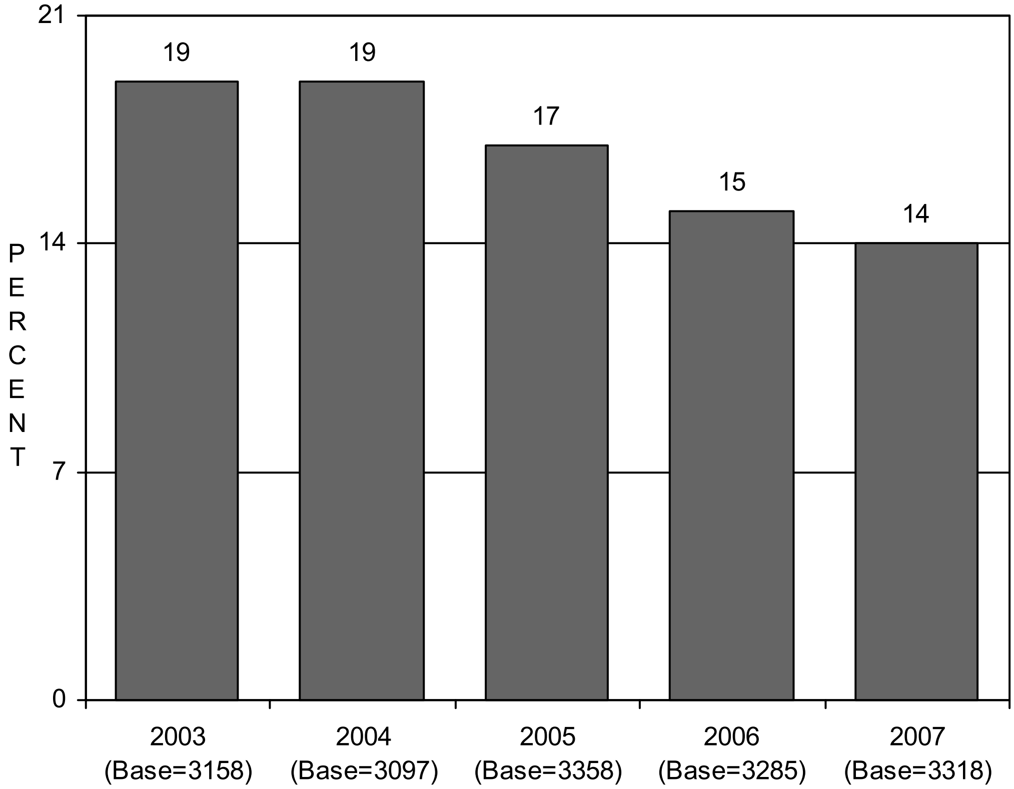


Figure 39 shows the room rate category by the booking method for 2007. Those who booked on the Internet directly (67%) or in person (74%) were most likely to say they got a regular room rate. Those who booked through a travel agent (55%) were far more likely than others say they got a package rate, and almost no packages were booked by *directly* contacting the hotel – either in person, on the phone, or on the Internet. Those who booked by phone through a third party (40%) were most likely to say they received some other special room rate, followed by phone direct (30%) third-party Internet (26%), and in person (23%). Those who called the hotel directly (37%) were more likely than others to say they got a casino or casino complimentary rate. Those who went through a travel agent (12%), third-party phone (11%), or third-party Internet (9%) were more likely than others to say they received a convention rate.

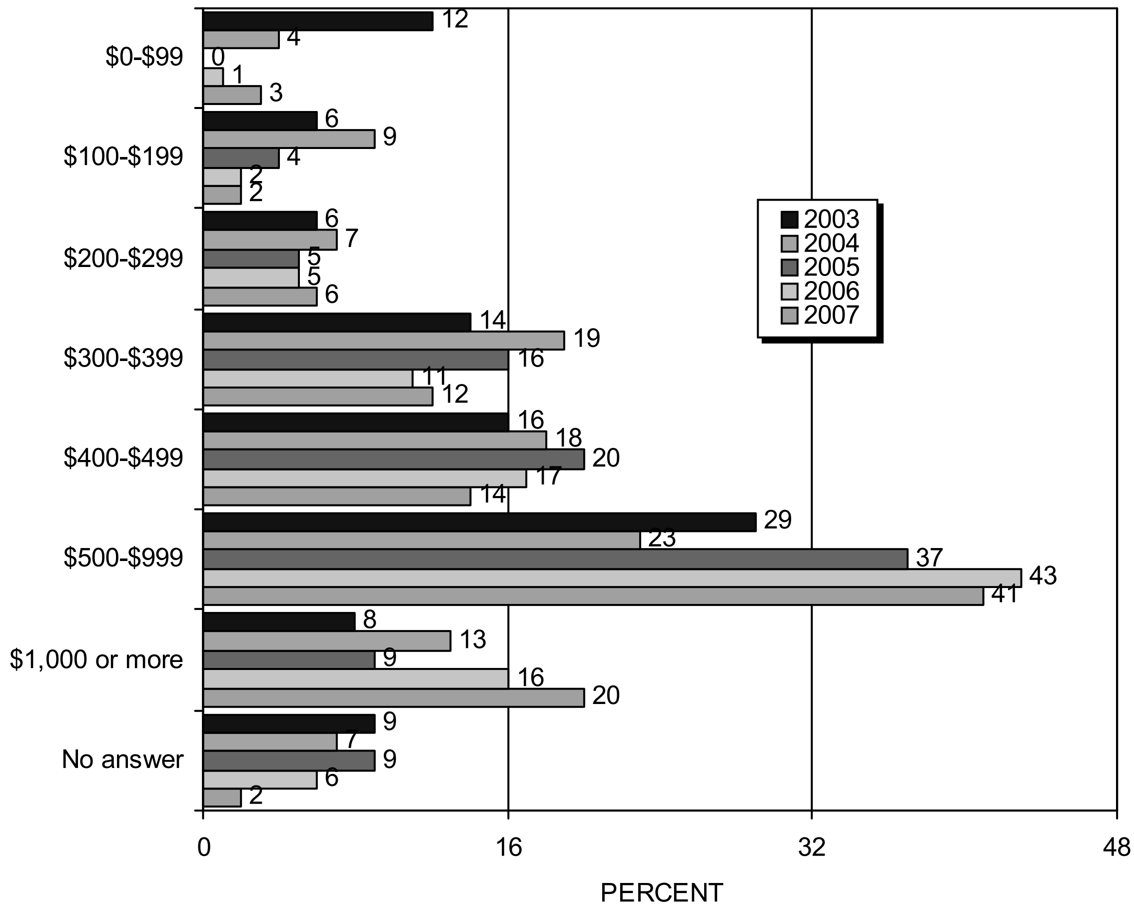
FIGURE 40
Package Purchasers*
(Among Those Staying In A Hotel Or Motel)



Fourteen percent (14%) of visitors purchased a package deal or were part of a tour group, similar to last year, but down significantly from 19% in both 2003 and 2004, and 17% in 2005 (Figure 40).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 41
Cost Of Package Per Person*
(Among Those Who Bought A Package)

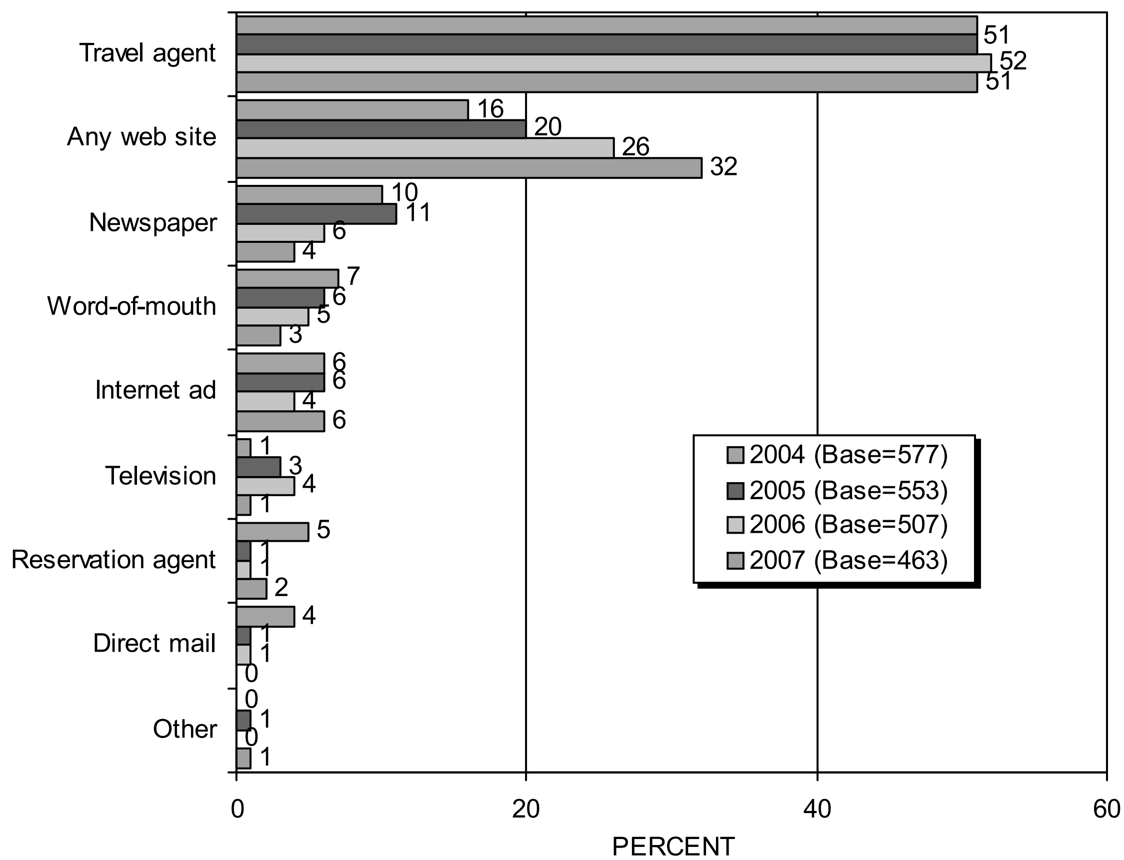


Means: 2003=$484.13, 2004=$561.49, 2005=$571.43, 2006=$662.78; 2007=$709.90
Base Sizes: 2003=595, 2004=577, 2005=553, 2006=507; 2007=463

We asked those who had purchased a hotel, airline, or a tour/travel group package how much their packages cost per person (Figure 41). The average cost of such a package in 2007 was $709.90, up significantly from $484.13 in 2003, $561.49 in 2004, and $571.43 in 2005.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 42
Where First Heard About The Package*
(Among Those Who Bought A Package)



Package purchasers were asked where they first heard about the package they bought (Figure 42). About one-half (51%) said from a travel agent. One in three (32%) mentioned a website (an increase from 16% in 2004, 20% in 2005, and 26% last year), while 6% said an Internet ad, 4% said a newspaper (down from 10% in 2004 and 11% in 2005), 3% said through word of mouth, and 2% said from a reservation agent.

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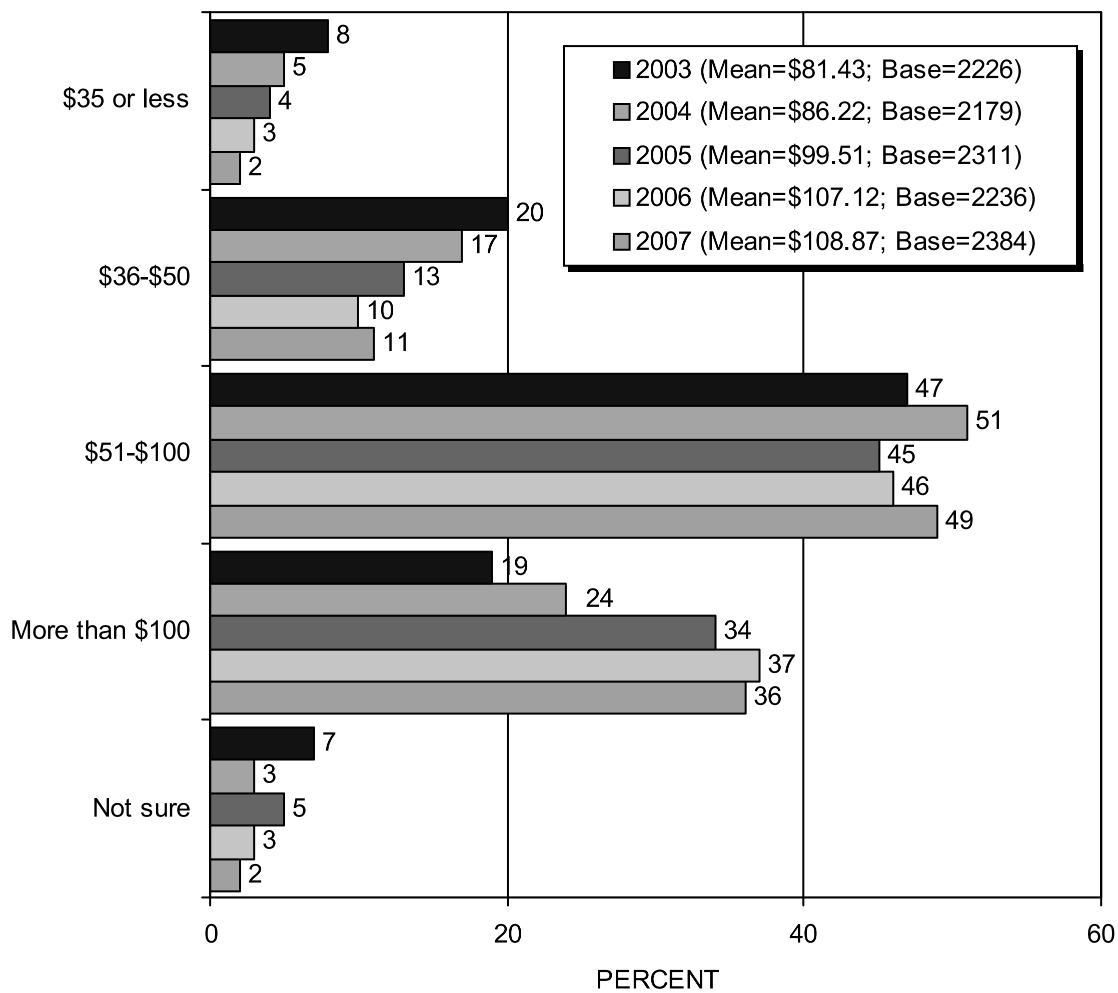
* NOTE: This question was first asked in 2004.

FIGURE 43
Lodging Expenditures — Average Per Night*
(Among Those Staying In A Hotel Or Motel/Non-Package)



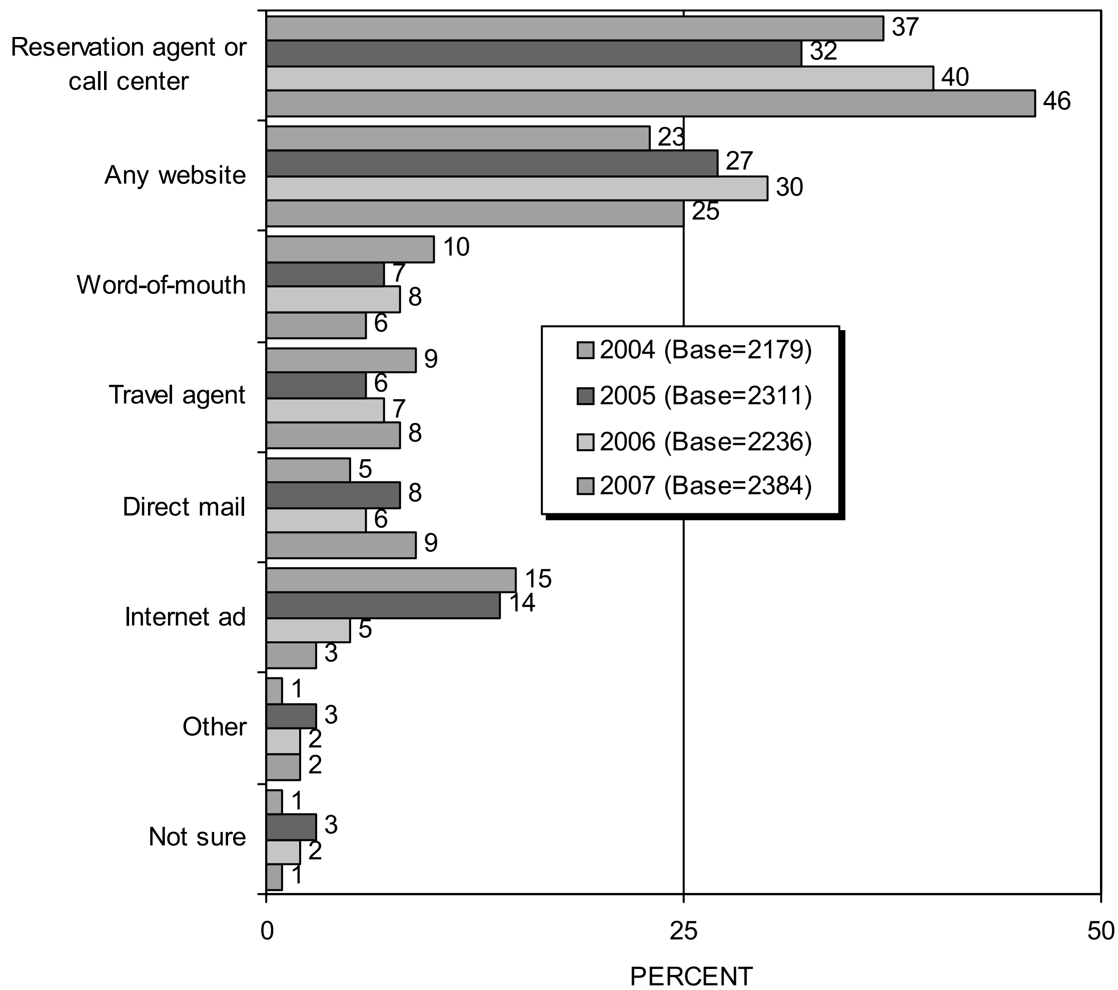
We looked at lodging expenditures among those who did *not* purchase travel packages (Figure 43). More than one-third (36%) of these non-package visitors paid over $100 per night for their room, a significant increase from 19% in 2003 and 24% in 2004.

The average daily room rate for non-package visitors was $108.87 in 2007, similar to last year, but up significantly from $81.43 in 2003, $86.22 in 2004, and $99.51 in 2005.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 44
How First Found Out About Room Rate*
(Among Those Staying In A Hotel Or Motel/Non-Package)



Visitors were asked how they first found out about the room rate they paid (Figure 44). Nearly one-half (46%) said it was through a reservation agent or call center, up from 37% in 2004, 32% in 2005, and 40% last year. One in four (25%) mentioned a website, down from 30% last year. Nine percent (9%) mentioned direct mail (up from 5% in 2004 and 6% in 2006), 8% said it was through a travel agent (up from 6% in 2005), 6% said through word-of-mouth (down from 10% in 2004 and 8% last year), and 3% said an Internet ad, down from previous years.

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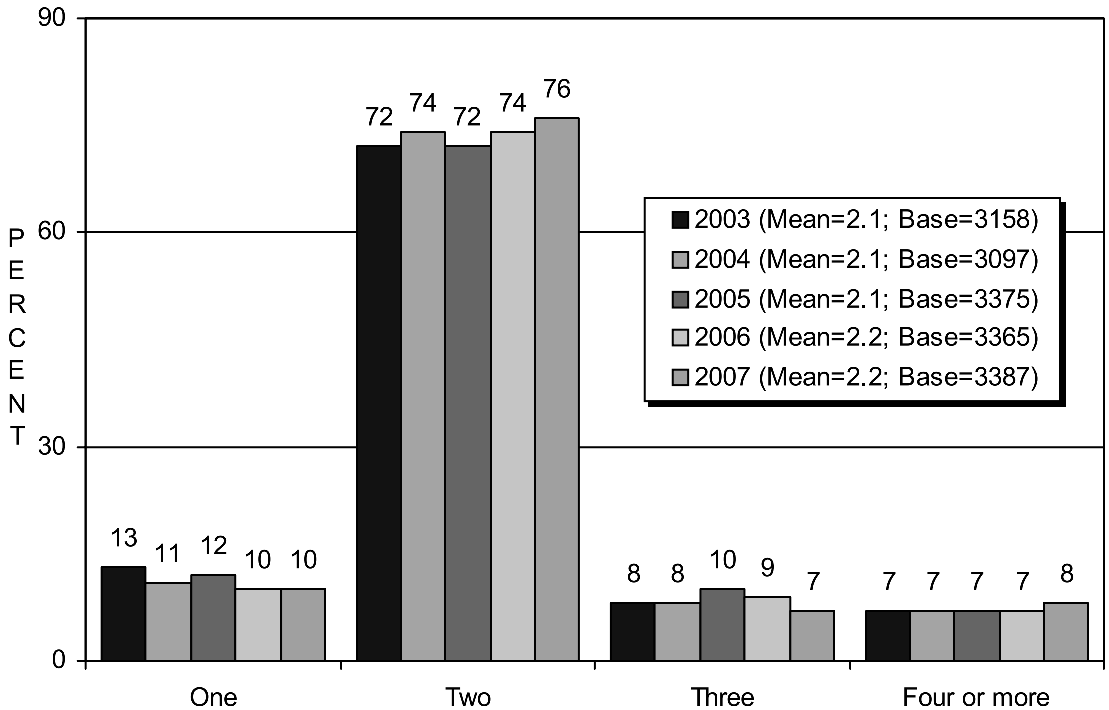
* This question was first asked in 2004.

FIGURE 45
Number Of Room Occupants*
(Among Those Staying In A Hotel Or Motel)

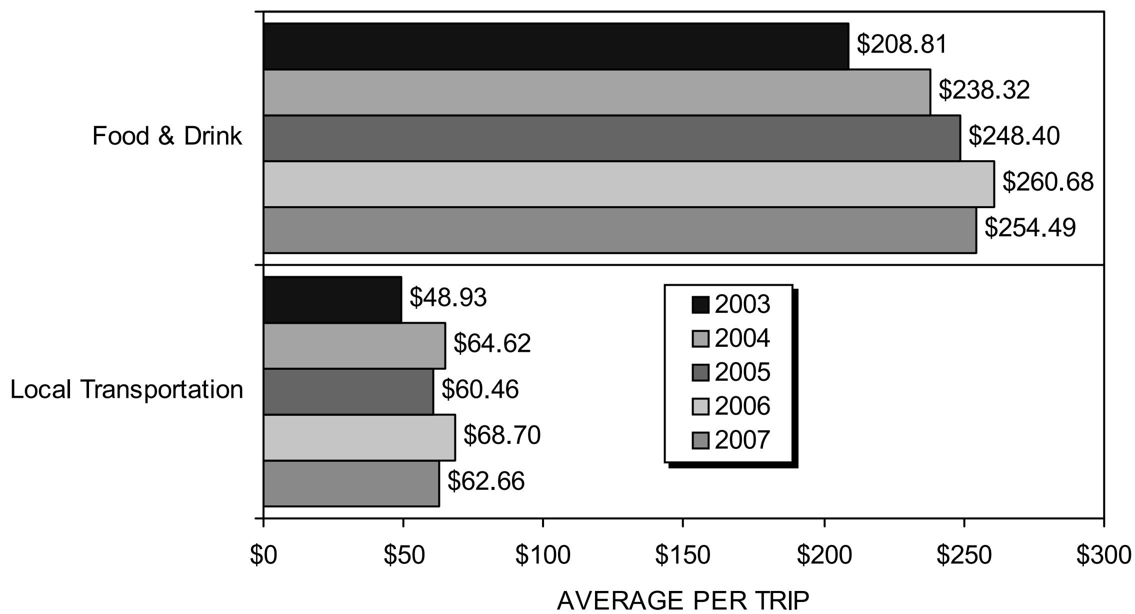


As in past years, the majority (76%) of visitors who stayed in a hotel or motel said two people stayed in their room (Figure 45). The mean (average) number of room occupants in 2007 was 2.2.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 46
Average Trip Expenditures On Food & Drink —
And On Local Transportation*
(Including Visitors Who Spent Nothing In That Category)



We asked all visitors about their daily expenditures on food and drink and on local transportation.

Figure 46 shows the average *trip* expenditures on food and drink and on local transportation *including visitors who said they spent nothing in that category*. The average expenditure on food and drink in 2007 was $254.49, up significantly from $208.81 in 2003, and $238.32 in 2004.

The average transportation expenditure for 2007 was $62.66, up from $48.93 in 2003, but down from $68.70 last year.

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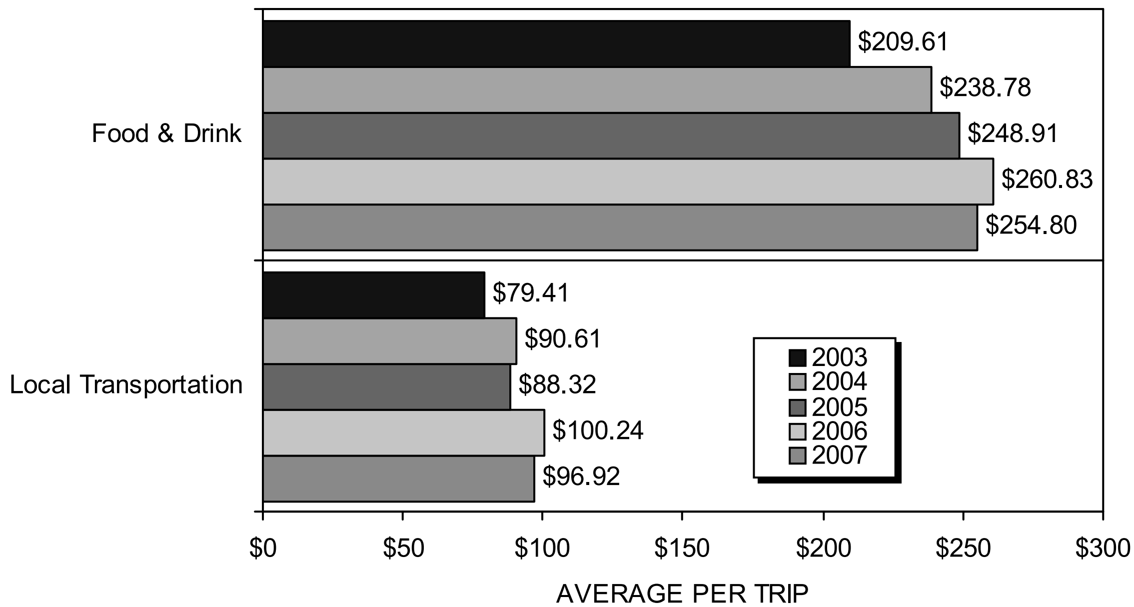
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Trip expenditures are calculated by multiplying respondents' estimated daily expenditures by the number of days they had spent in Las Vegas on their most recent trip.

FIGURE 47
Average Trip Expenditures On Food & Drink —
And On Local Transportation*
(Among Those Who Spent Money In That Category†)



Among visitors who actually spent money in these categories, average trip expenditures on food and drink in 2007 was $254.80, up significantly from $209.61 in 2003, and $238.78 in 2004 (Figure 47).

The average trip expenditure on local transportation for 2007 was $96.92, up from $79.41 in 2003, and $88.32 in 2005.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

† Percentages of respondents who spent money in each category are shown in the following table:

	2003	2004	2005	2006	2007
Food and Drink					
Base size	(3317)	(3294)	(3592)	(3592)	(3590)
Proportion of total	99%	99.8%	99.8%	99.8%	99.7%
Local Transportation					
Base size	(2021)	(2350)	(2456)	(2465)	(2323)
Proportion of total	60%	71%	68%	68%	65%

FIGURE 48
Average Trip Expenditures On
Shopping, Shows, And Sightseeing*
(Including Visitors Who Spent Nothing In That Category)

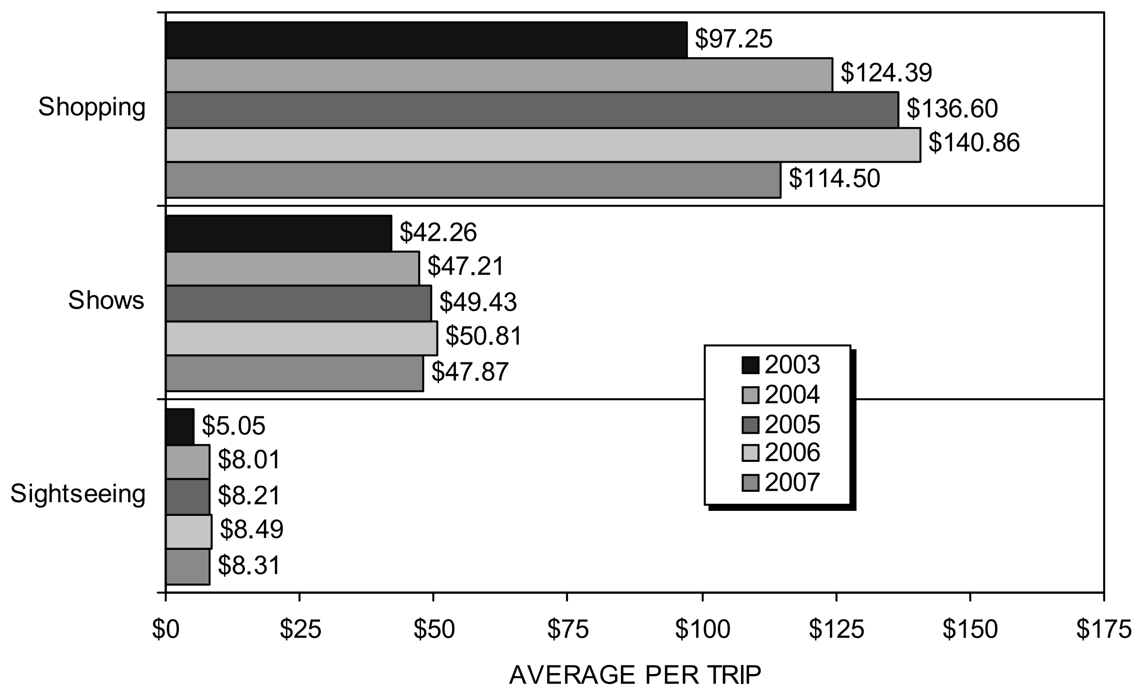
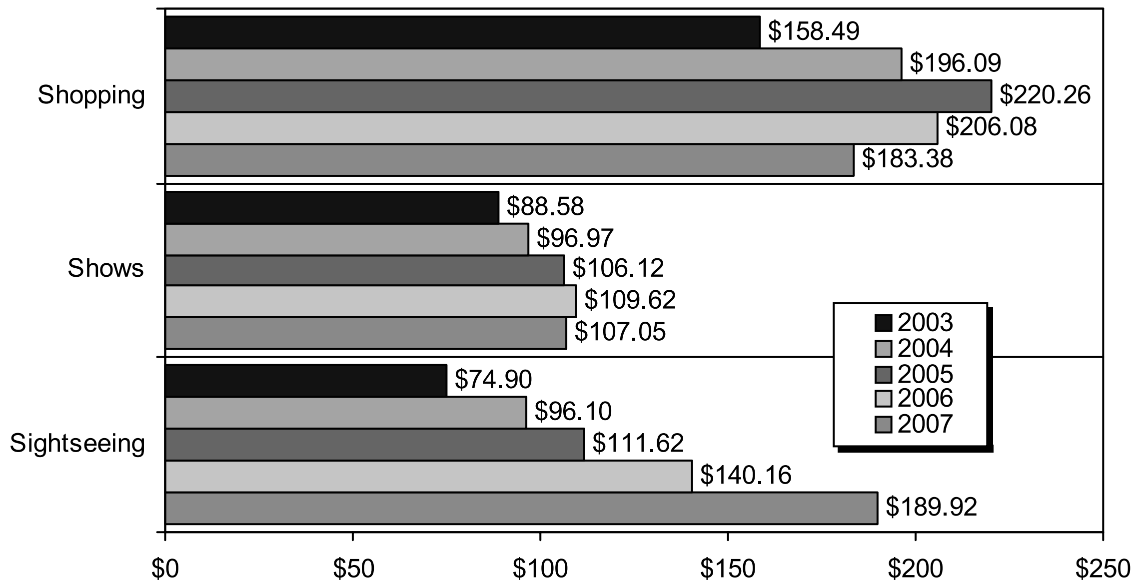


Figure 48 shows average expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas — *including visitors who said they spent nothing* in these categories. The average trip expenditure on shopping was $114.50, down from $136.60 in 2005 and $140.86 last year. The average expenditure on shows was $47.87, up significantly from $42.26 in 2003. The average expenditure on sightseeing was $8.31.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 49
Average Trip Expenditures On
Shopping, Shows, And Sightseeing*
(Among Those Who Spent Money In That Category†)



Among spending visitors, the average trip shopping expenditure was $183.38, down significantly from $220.26 in 2005 (Figure 49). The average trip total spent on shows was $107.05, up from $88.58 in 2003 and $96.97 in 2004. The sightseeing total was $189.92, up significantly from $74.90 in 2003, $96.10 in 2004, $111.62 in 2005, and $140.16 last year.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

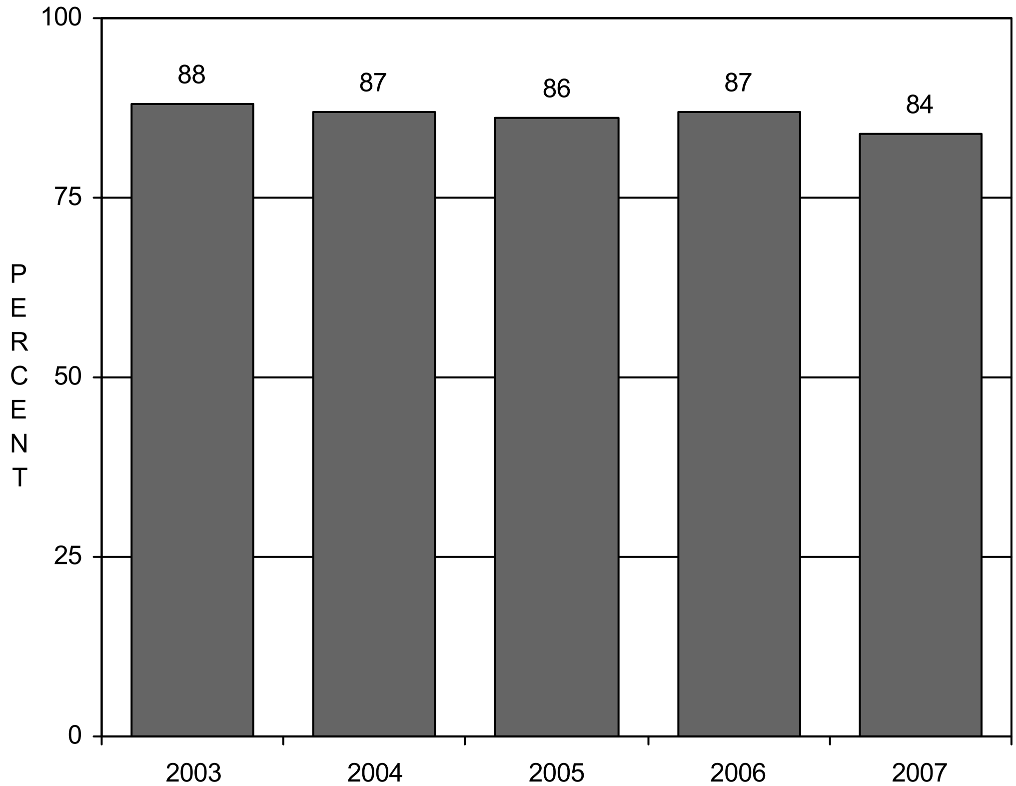
† Percentages of respondents who spent money in each category are shown in the following table:

	2003	2004	2005	2006	2007
Shopping					
Base size	(1969)	(2093)	(2232)	(2459)	(2245)
Proportion of total	59%	63%	62%	68%	62%
Shows					
Base size	(1592)	(1606)	(1677)	(1667)	(1607)
Proportion of total	48%	49%	47%	46%	45%
Sightseeing					
Base size	(222)	(274)	(265)	(218)	(157)
Proportion of total	7%	8%	7%	6%	4%

GAMING BEHAVIOR AND BUDGETS

Eighty-four percent (84%) of all visitors said they gambled while in Las Vegas, down from 88% in 2003, and 87% each in 2004 and 2006 (Figure 50).

FIGURE 50
Whether Gambled While In Las Vegas*



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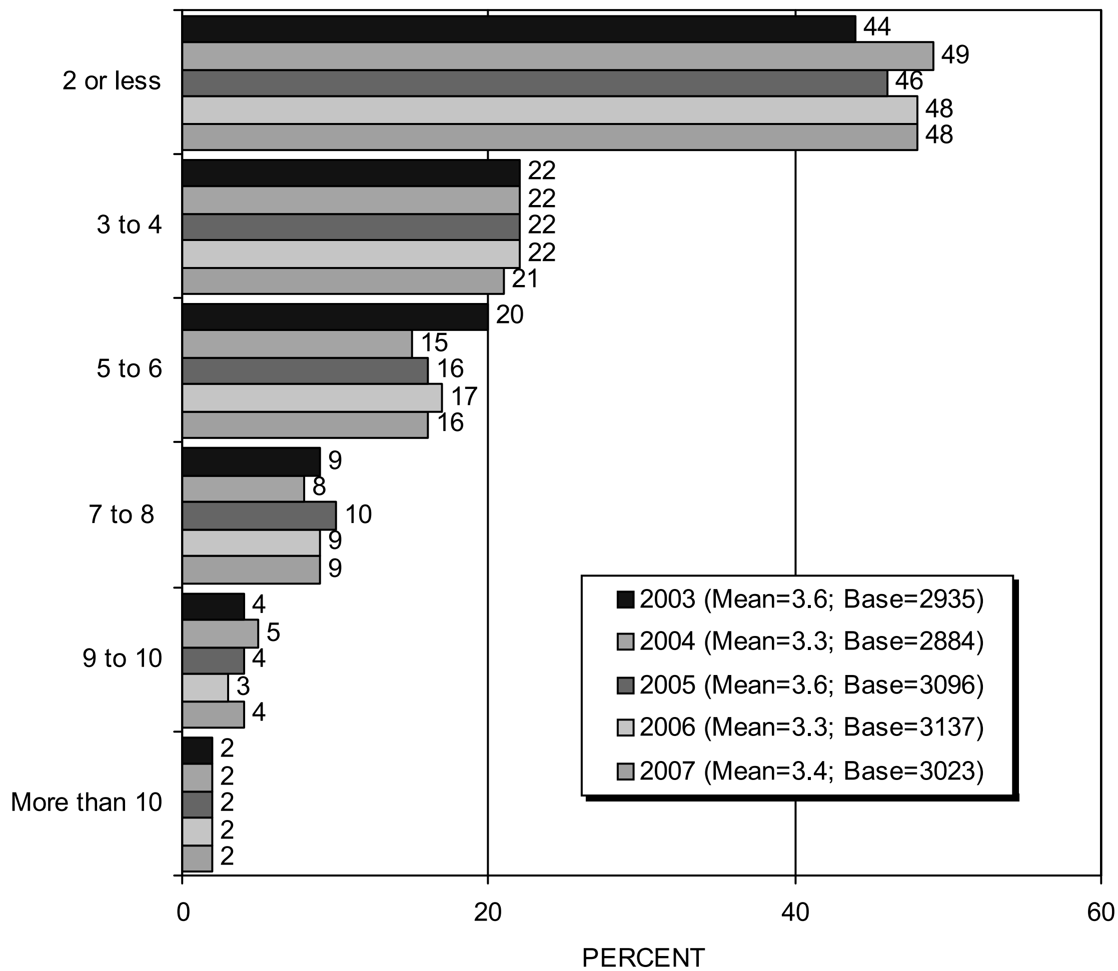
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

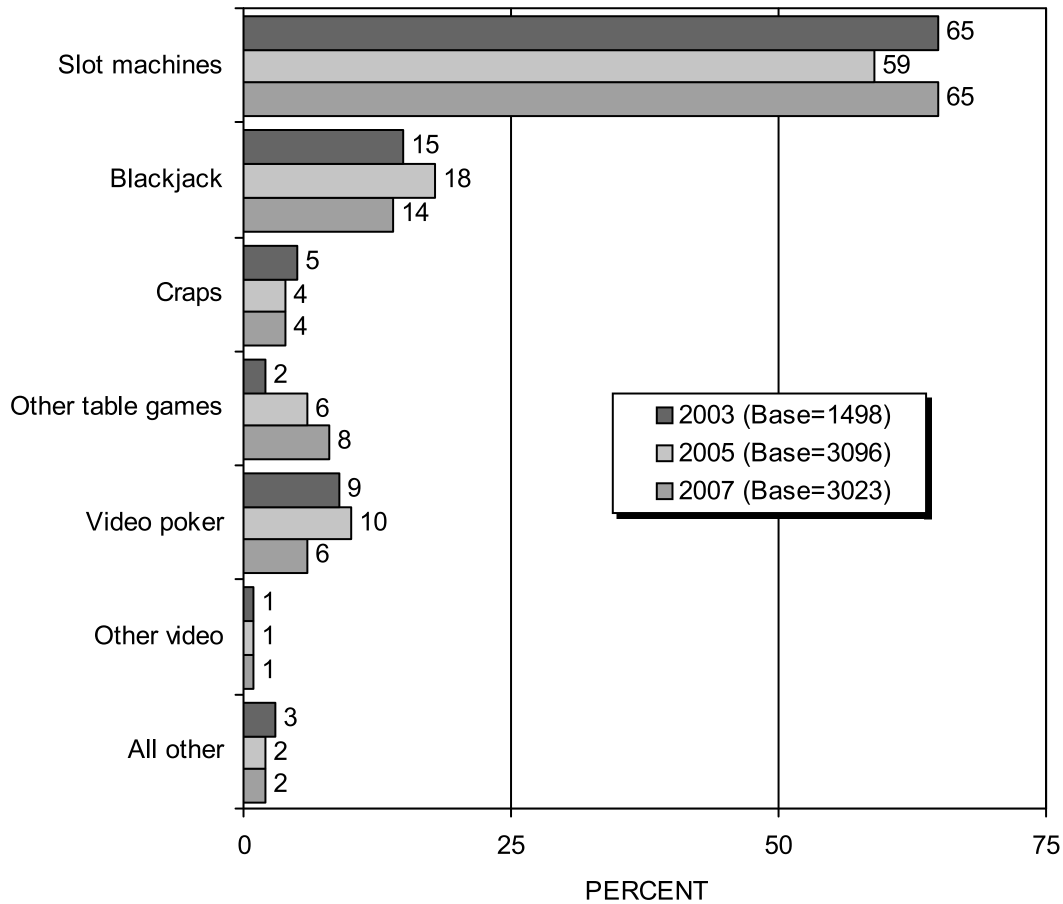
FIGURE 51
Hours Of Gambling — Average Per Day*
(Among Those Who Gambled)



Among those who gambled while in Las Vegas, the average amount of time spent gambling per day was 3.4 hours, similar to last year, but down from 3.6 hours in both 2003 and 2005 (Figure 51).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 52
Casino Game Played Most Often*
(Among Those Who Gambled — Asked Every Other Year)



Those who gambled on their current trip to Las Vegas were asked which casino game they played the most often. Slots remains the most popular game, mentioned by 65% of gamblers, up significantly from 59% in 2005. Fourteen percent (14%) said they played blackjack the most often (down from 18% in 2005), followed by video poker (6%, down from 9% in 2003 and 10% in 2005), and craps (4%, unchanged from 2005). Eight percent (8%) played other tables games most often, an increase from 2% in 2003 (Figure 52).

* This question is asked every other year and was not asked in 2004 or 2006. In this calendar year report, the data reported for 2003 is from January through June of that year.

FIGURE 53
Number of Casinos Visited*

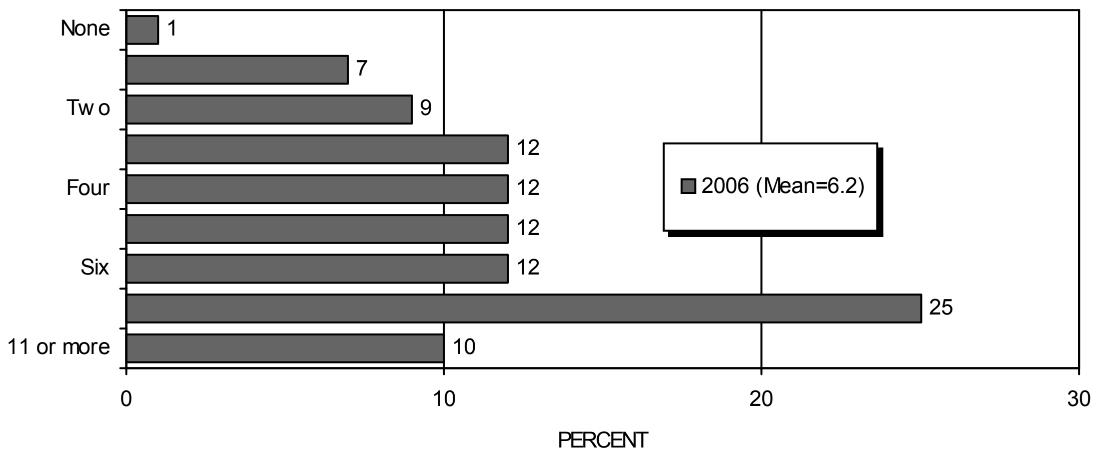
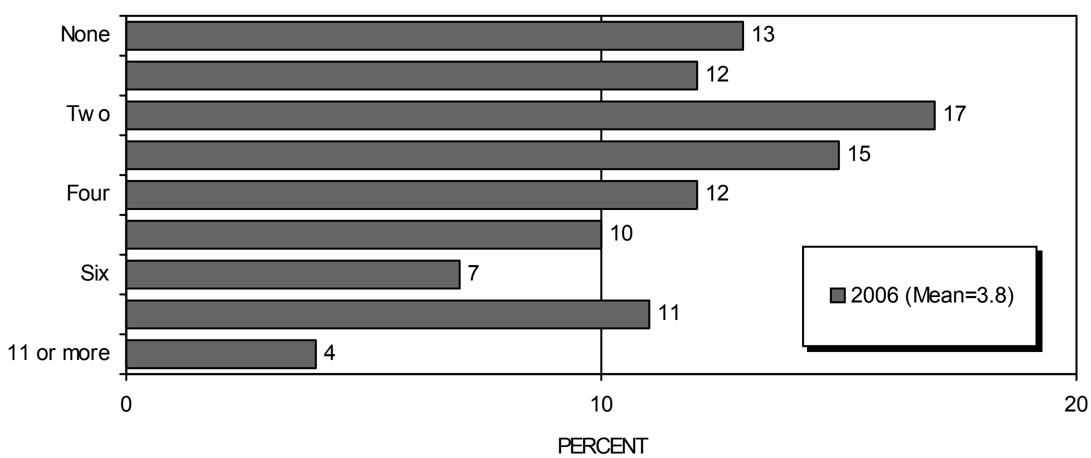


FIGURE 54
Number of Casinos Where Gambled*



All visitors to Las Vegas were asked how many casinos they had visited, and in how many of those casinos they had gambled. The average number of casinos visited in 2006 was 6.2, and the number of casinos at which visitors gambled was 3.8 (Figures 53 and 54).

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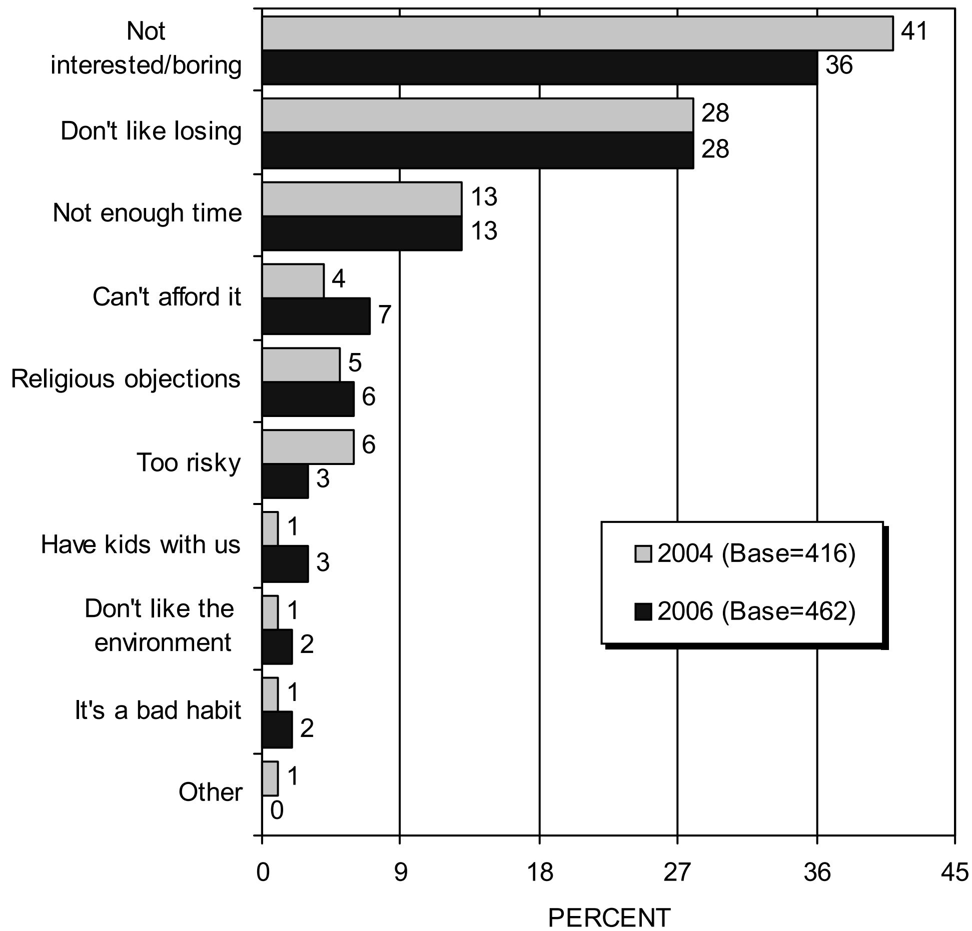
* These questions were added in 2006 and are asked every other year; they were not asked in 2007

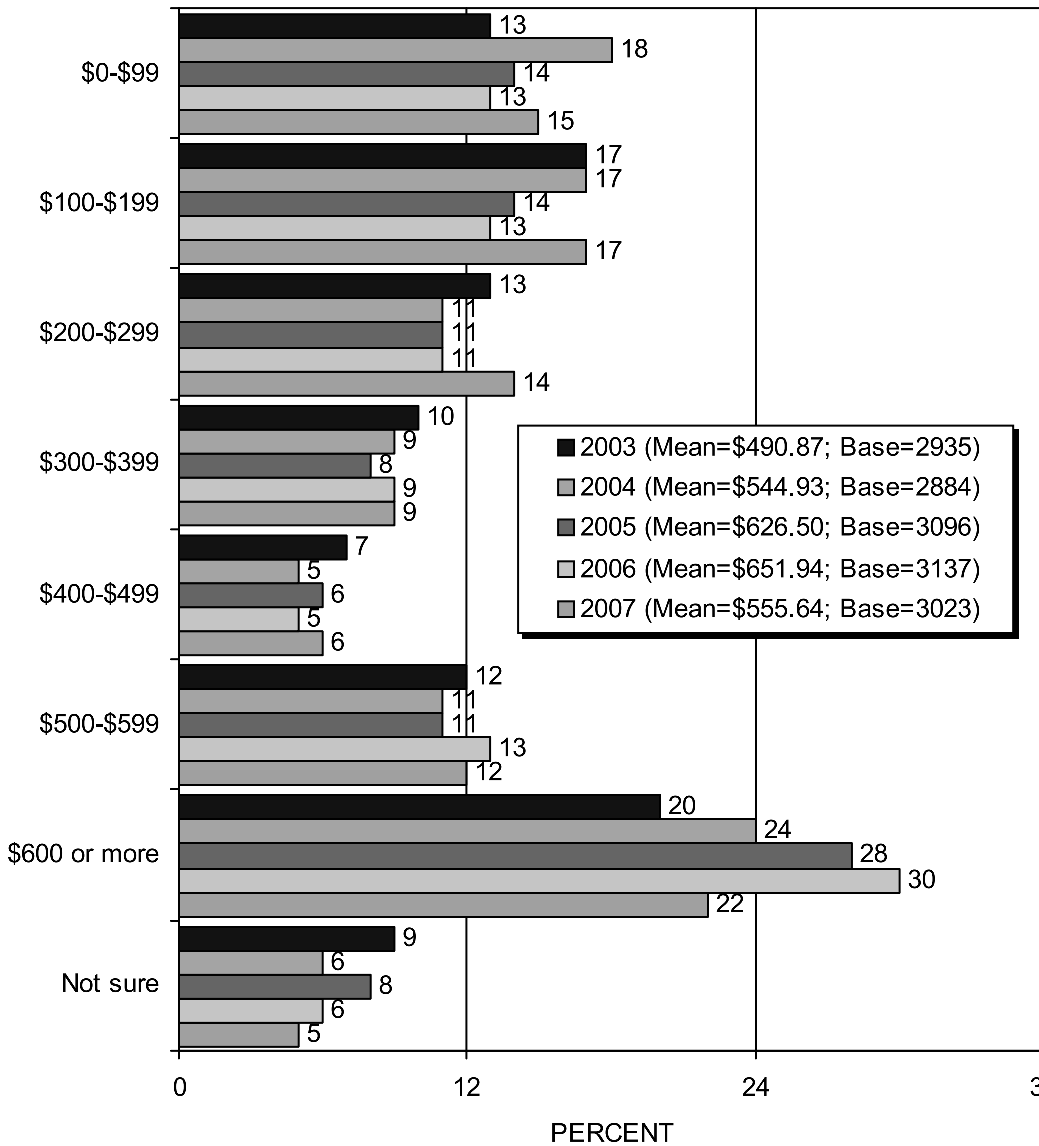
FIGURE 55
Main Reason For Not Gambling*
(Among Those Who Did Not Gamble – Asked Every Other Year)



Visitors who did not gamble were asked why (Figure 55). The largest numbers of these visitors said they were not interested in gambling or found it boring (36%). Another 28% said they didn't like losing, while 13% said they didn't have enough time for gambling, 7% said they can't afford it, 6% voiced religious objections, 3% each said it's too risky or that they have children with them, and 2% each said they don't like the environment or that it's a bad habit.

* This question is asked every other year and was not asked in 2003, 2005, or 2007.

FIGURE 56
Trip Gambling Budget*
(Among Those Who Gambled)

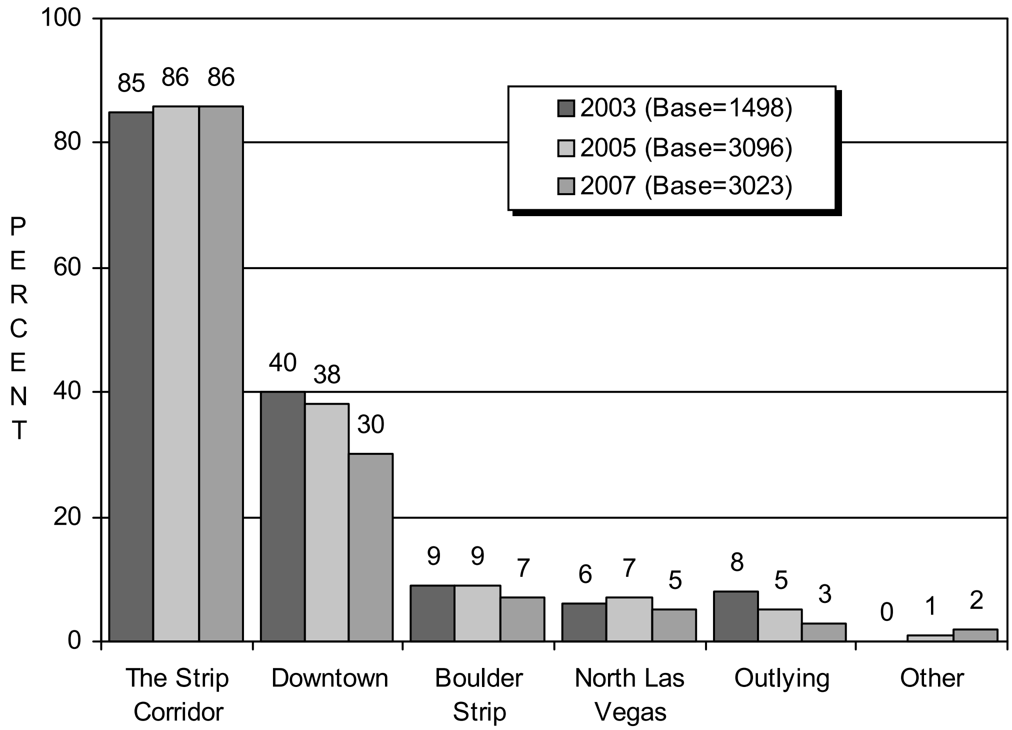


As Figure 56 shows, the average gambling budget among those who gambled was $555.64, down significantly from $626.50 in 2005 and $651.94 in 2006. Twenty-two percent (22%) of gamblers said they budgeted $600 or more for gambling, down significantly from 28% in 2005 and 30% in 2006.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 57
Where Visitors Gambled*
(Among Those Who Gambled – Asked Every Other Year)



Most visitors (86%) gambled on the Strip Corridor† (Figure 57). Thirty percent (30%) said they gambled Downtown (down from 40% in 2003 and 38% in 2005), 7% gambled in the Boulder Strip area (down from 9% in 2005), 5% in North Las Vegas, and 3% in outlying areas (down from 8% in 2003 and 5% in 2005).

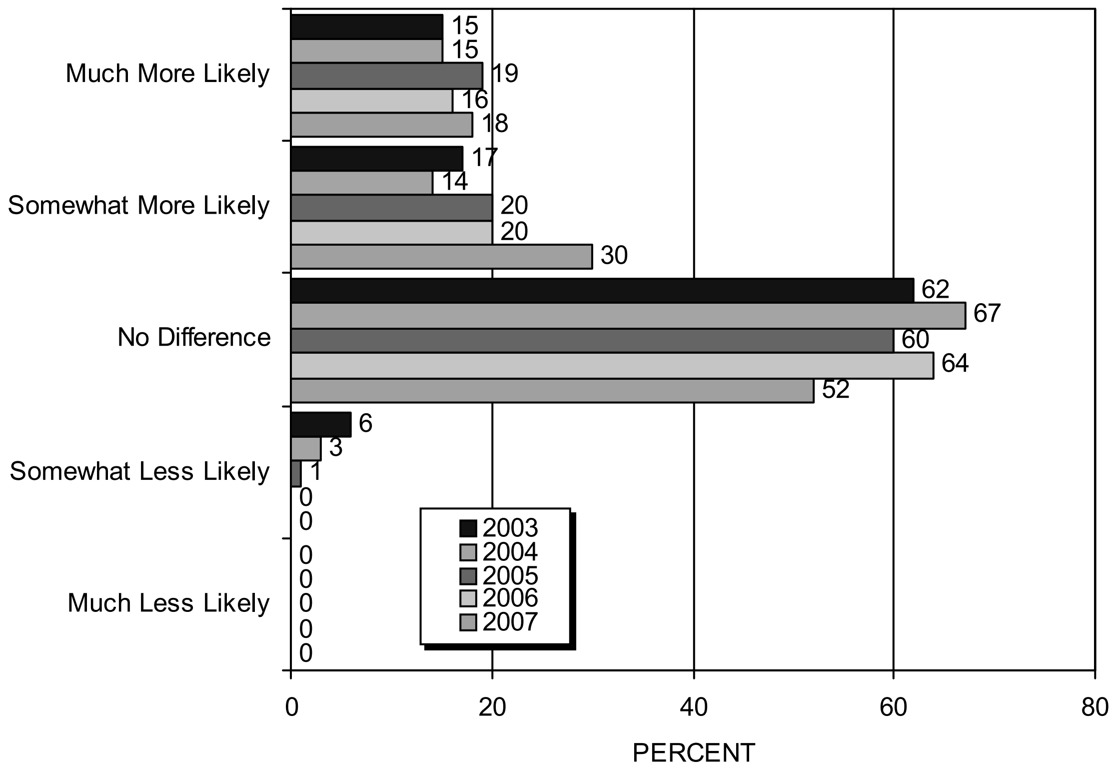
---

* This question is asked every other year and was not asked in 2004 or 2006. In this calendar year report, the data reported for 2003 is from January through June of that year.

Multiple responses to this question were permitted.

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

FIGURE 58
Likelihood Of Visiting Las Vegas With
More Places To Gamble Outside Las Vegas*



Visitors to Las Vegas were asked the following:

> "Now that there are more places to gamble outside of Las Vegas, do you feel you are more likely or less likely to visit Las Vegas, or does it not make a difference in your decision to visit Las Vegas?"

Nearly one-half (48%) said they were either somewhat or much *more* likely to visit Las Vegas, up from 32% in 2003, 29% in 2004, 39% in 2005, and 36% last year. Fifty-two percent (52%) of visitors said that having other places to gamble made no difference in their decision to visit Las Vegas, down from all prior years (Figure 58). Less than 1% said they were *less* likely to visit Las Vegas, down from 6% in 2003 3% in 2004, and 1% in 2005.

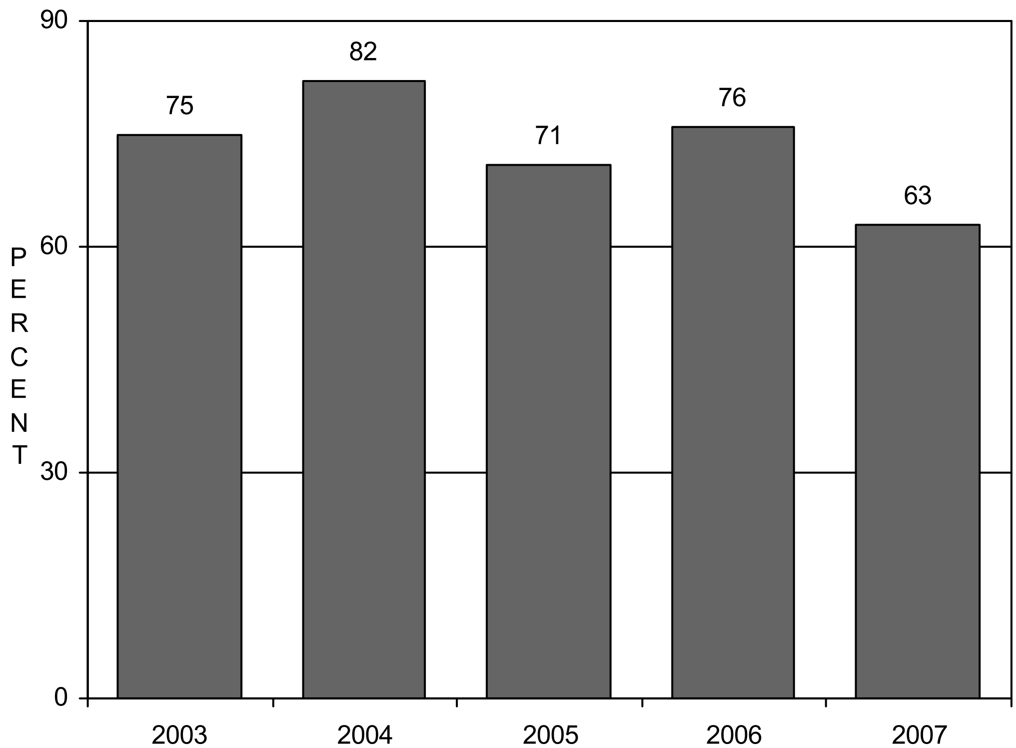
---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

ENTERTAINMENT

Sixty-three percent (63%) of visitors attended shows during their stay, down significantly from all prior years (Figure 59).

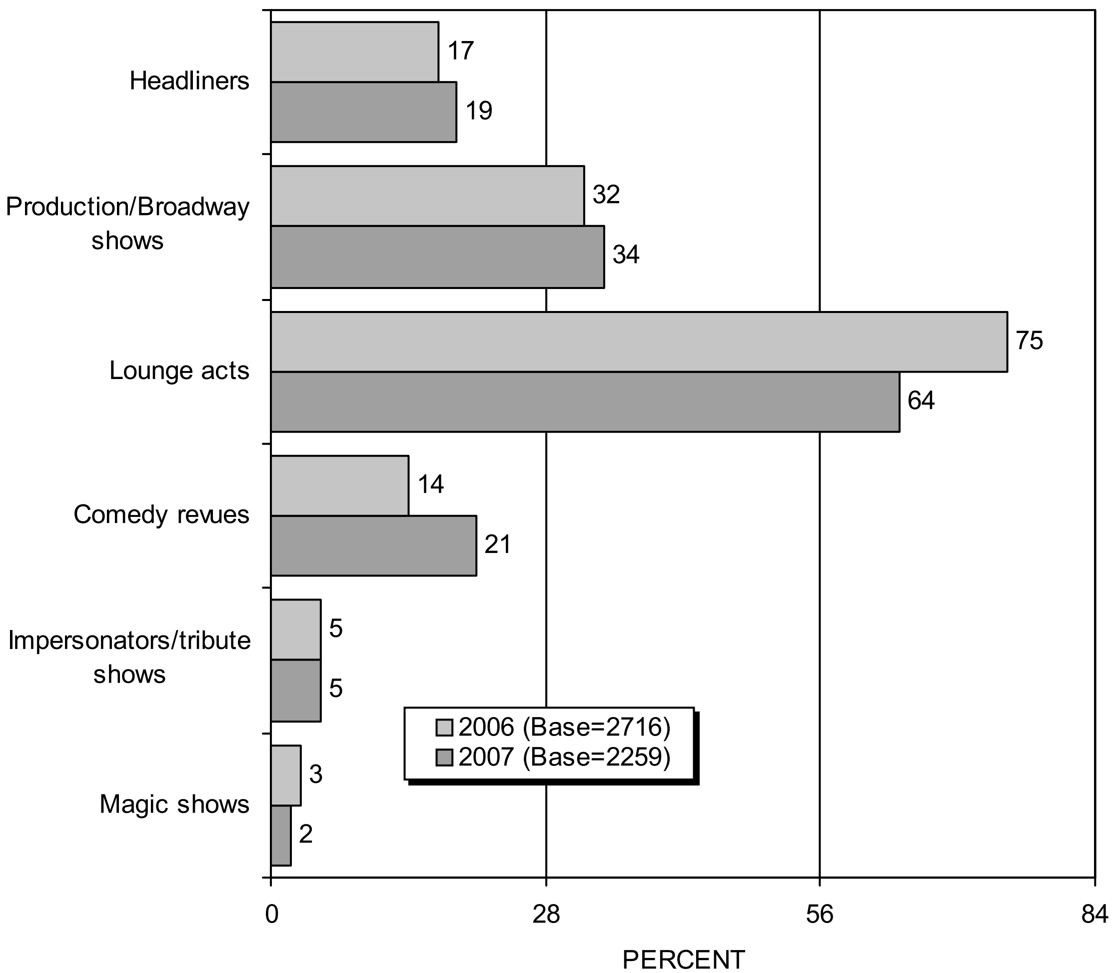
FIGURE 59
Entertainment Attendance*



* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only “yes” responses are reported in this chart.

FIGURE 60
Types Of Entertainment*
(Among Those Who Attended Some Form Of Entertainment)



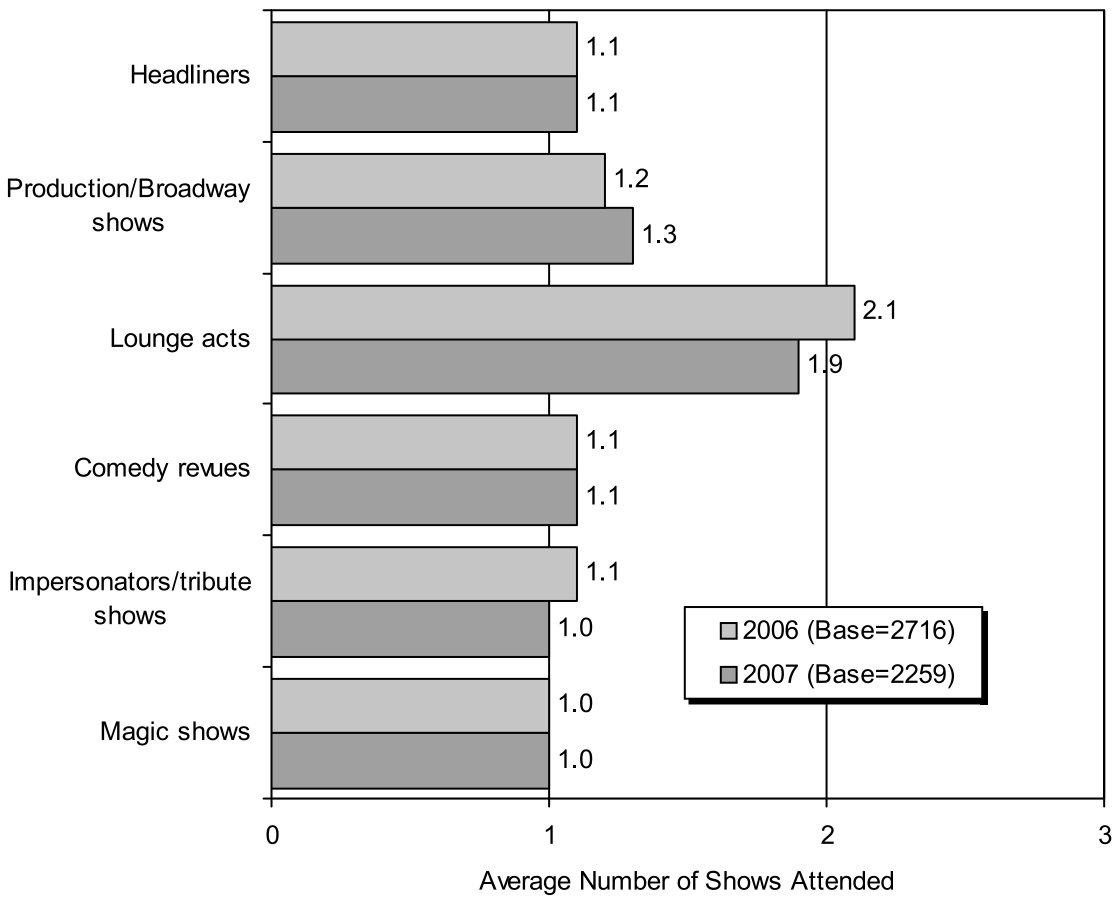
In 2007, 64% of visitors who saw a show in Las Vegas went to a lounge act (down from 75% in 2006), 34% went to a production or Broadway-type show, 21% saw a comedy show (up from 14% last year),19% saw a headliner, 5% saw an impersonator/tribute show, and 2% saw a magic show (Figure 60).

---

* NOTE: In 2006 the method of asking visitors about shows was changed in order to obtain more detailed information about the types of shows attended. As a result of this change, comparisons to results from before 2006 are not possible.

Multiple responses were permitted.

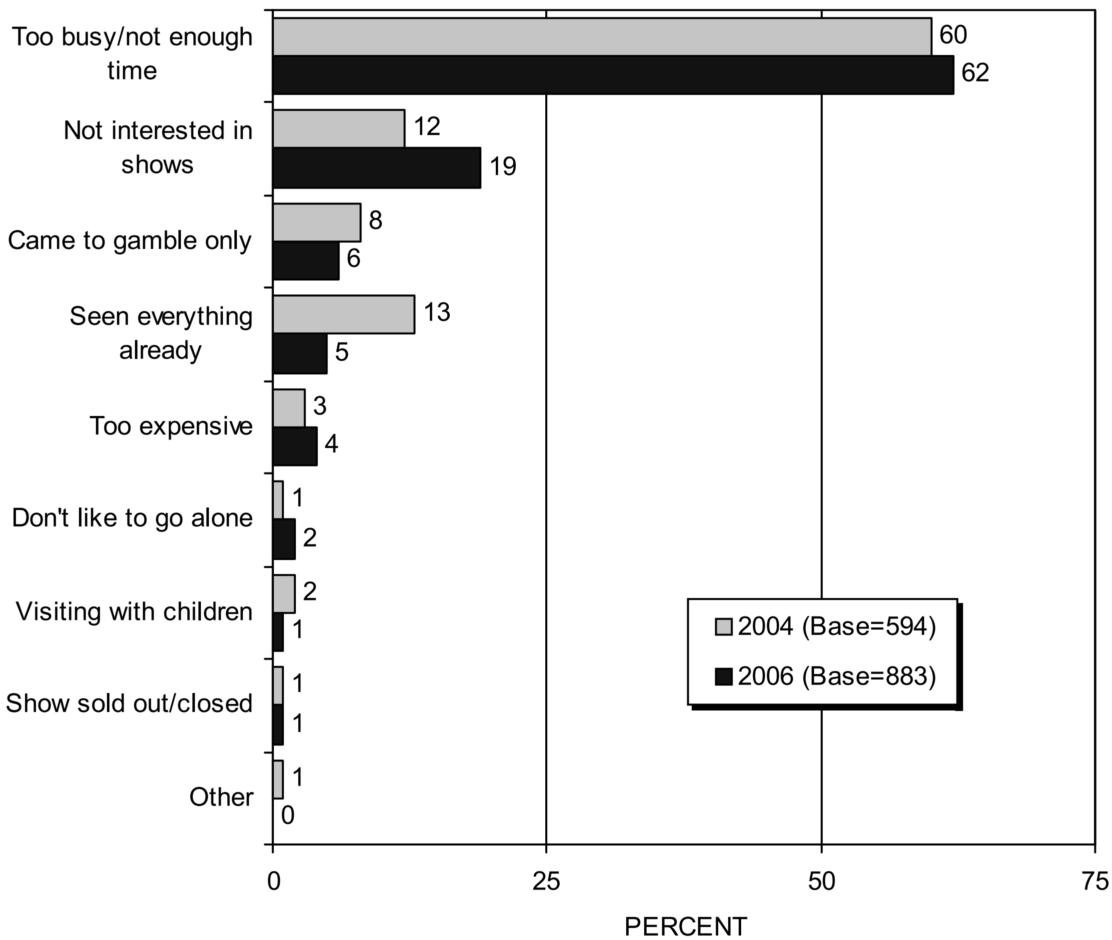
FIGURE 61
Average Number Of Shows Attended*
(Among Those Who Attended Some Form Of Entertainment)



Visitors who saw shows were asked how many shows they saw of each type (Figure 61). The average number of shows attended was highest for visitors who saw lounge acts (1.9, down from 2.1 in 2006). Visitors also saw an average of 1.3 production and Broadway-type shows, 1.1 headliners, 1.1 comedy revues, 1.0 impersonators/tribute shows, and 1.0 magic shows.

* NOTE: In 2006 the method of asking visitors about shows was changed in order to obtain more detailed information about the types of shows attended. As a result of this change, comparisons to past years are not possible.

FIGURE 62
Main Reason For Not Attending Any Shows*
(Among Those Who Attended No Shows – Asked Every Other Year)



Visitors who did not attend any shows while in Las Vegas were asked why (Figure 62). Most (62%) said they were too busy. Nineteen percent (19%) said they were not interested in shows (up from 12% in 2004), 6% said they came only to gamble, 5% said they had already seen all the shows (down from 13% in 2004), and 4% said the shows are too expensive.

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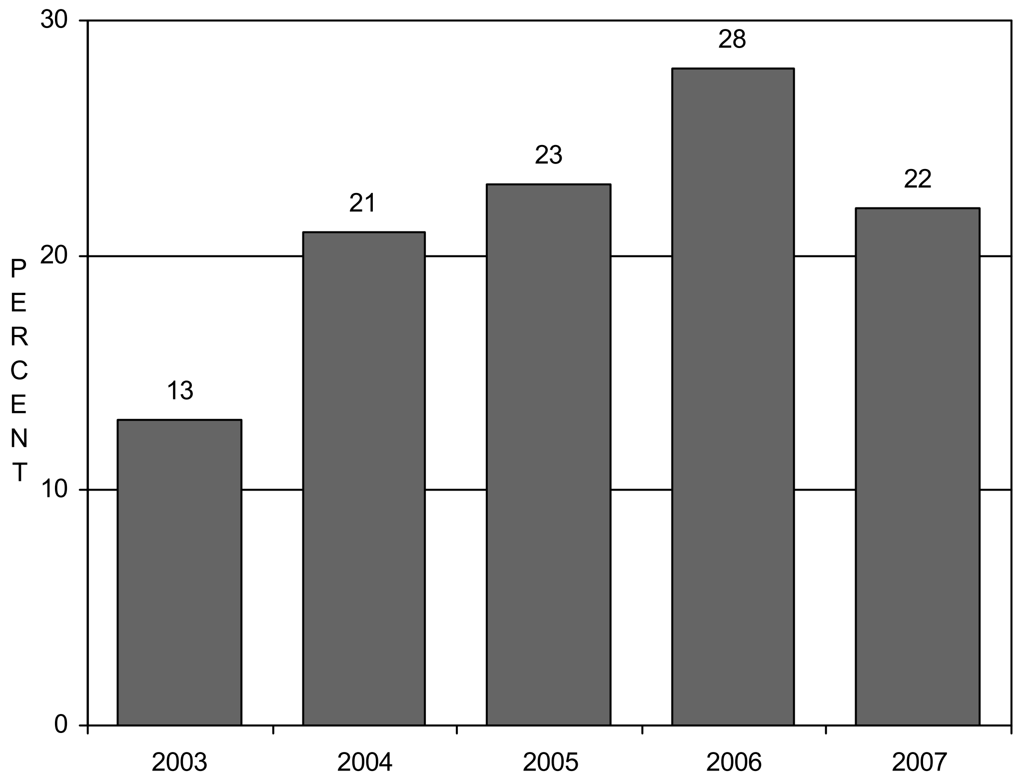
* This question is asked every other year and was not asked in 2003, 2005, or 2007.

FIGURE 63
Whether Has Been To Other Paid Attractions*



We asked visitors if they had been to other Las Vegas attractions for which they had to pay, such as the theme parks, water parks, or virtual reality rides (Figure 63). Twenty-two percent (22%) said yes, down significantly from 28% last year.

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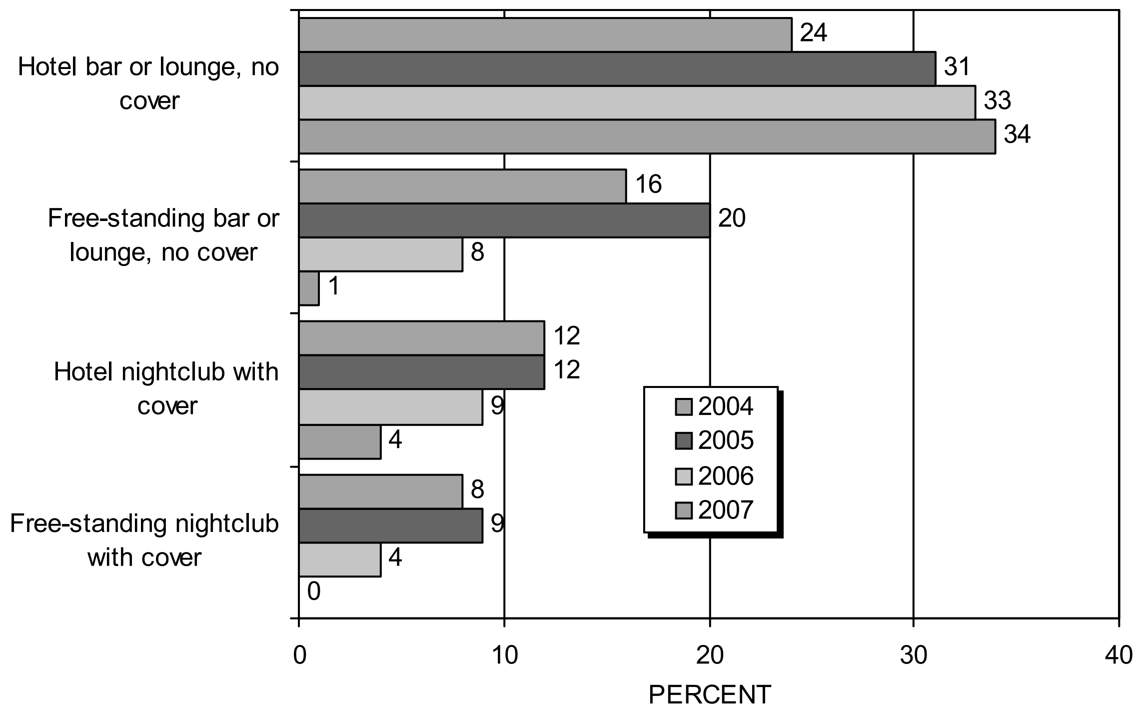
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only “yes” responses are reported in this chart.

FIGURE 64
Whether Has Been To Nightclubs, Bars, and Lounges*



Beginning in 2004, we asked visitors if they visited nightclubs, bars, or lounges while in Las Vegas (Figure 64). One in three (34%) said they had been to a no-cover hotel bar or lounge, up significantly from 24% in 2004 and 31% in 2005. Four percent (4%) had been to a hotel nightclub that charged a cover fee (down from 12% each in 2004 and 2005 and 9% last year),1% had been to a no-cover free-standing bar or lounge, and less than 1% had been to a free-standing nightclub that charged a cover fee, both down significantly from all prior years.

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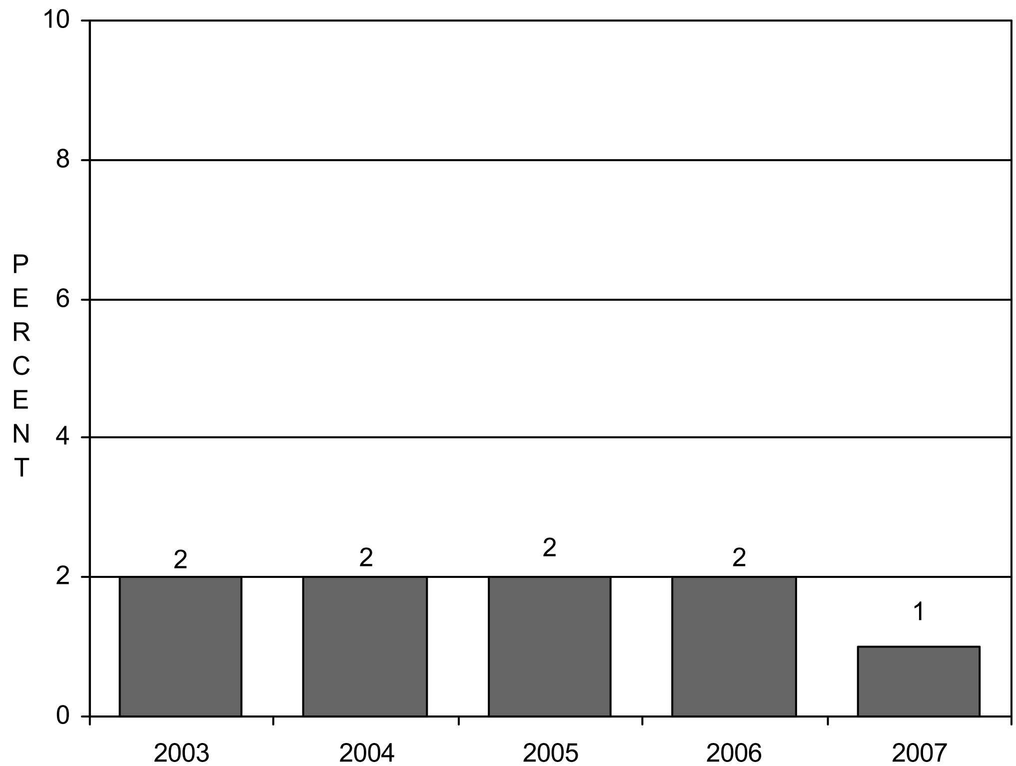
* This question was first asked in 2004.

Only "yes" responses are reported in this chart.

FIGURE 65
Whether Played Golf*



The proportion who said they had played golf during their current visit to Las Vegas was 1%, down from 2% in past years (Figure 65).

---

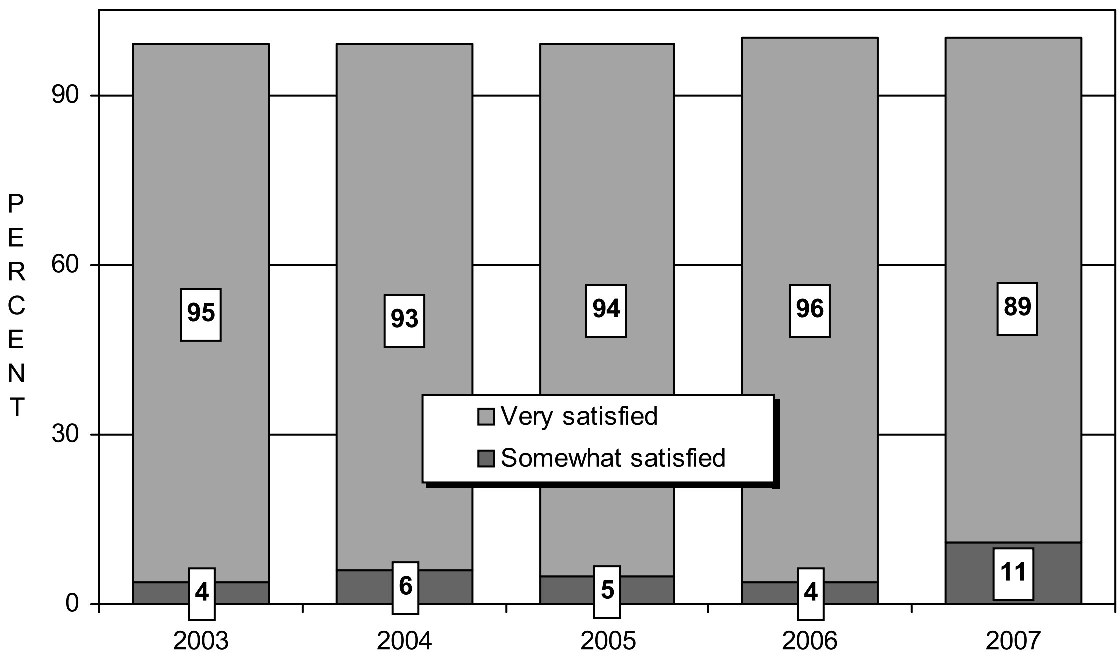
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

ATTITUDINAL INFORMATION

Eighty-nine percent (89%) of visitors said they were "very" satisfied with their visit to Las Vegas in 2007, down from all prior years, while 11% were "somewhat" satisfied, up from all prior years. One percent (1%) were either "somewhat" or "very" dissatisfied (Figure 66).

FIGURE 66
Satisfaction With Visit*



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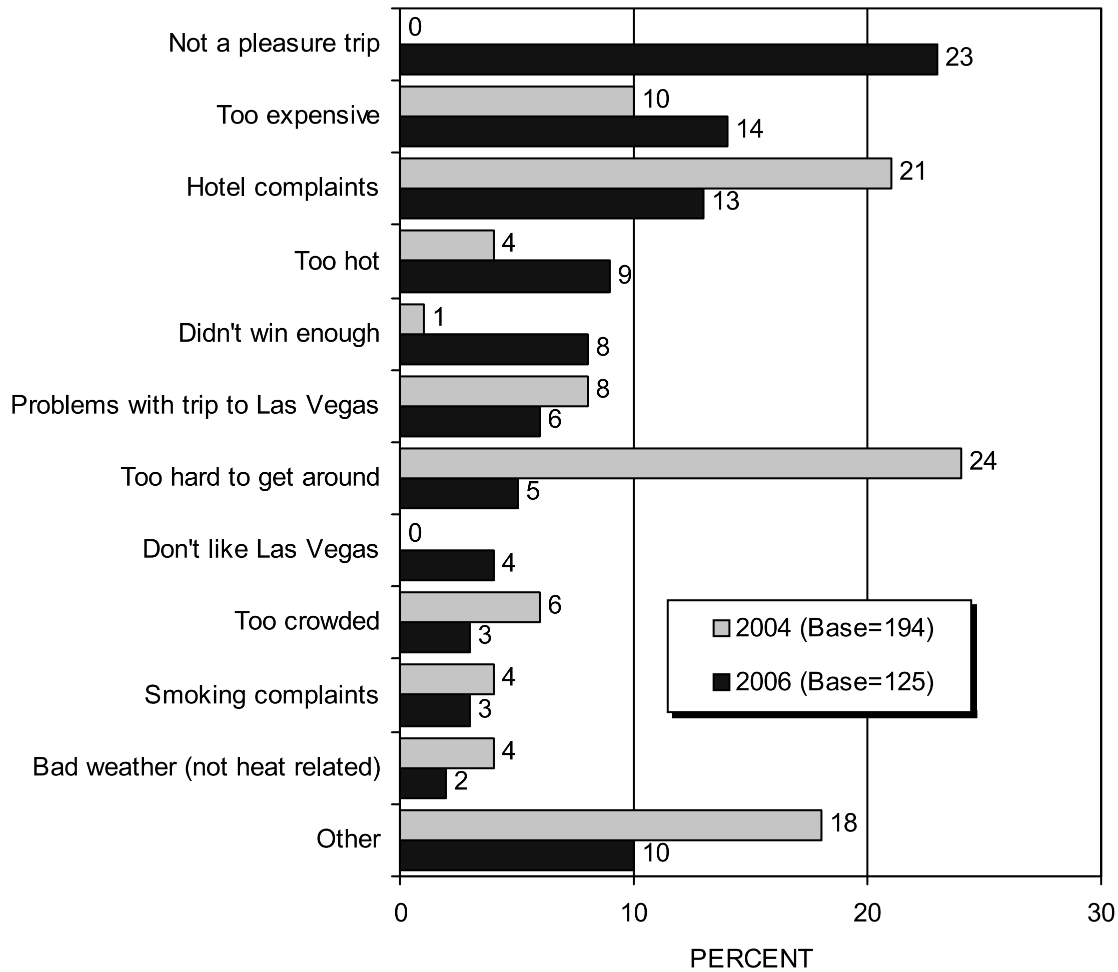
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 67
Why Not Completely Satisfied With Visit*
(Among Those Who Were "Somewhat" Satisfied – Asked Every Other Year)



Visitors who were not completely satisfied with their visit were asked to volunteer why (Figure 67). Nearly one-quarter (23%) said that it was not a pleasure trip – that is, they would have been more satisfied had it been a pleasure trip. Among the other reasons given were Las Vegas is "too expensive" (14%), hotel complaints (13%, down from 21% in 2004), the weather is too hot (9%), not winning enough gambling (8%, up from 1% in 2004), and "too hard to get around Las Vegas" (5%, down from 24% in 2004).

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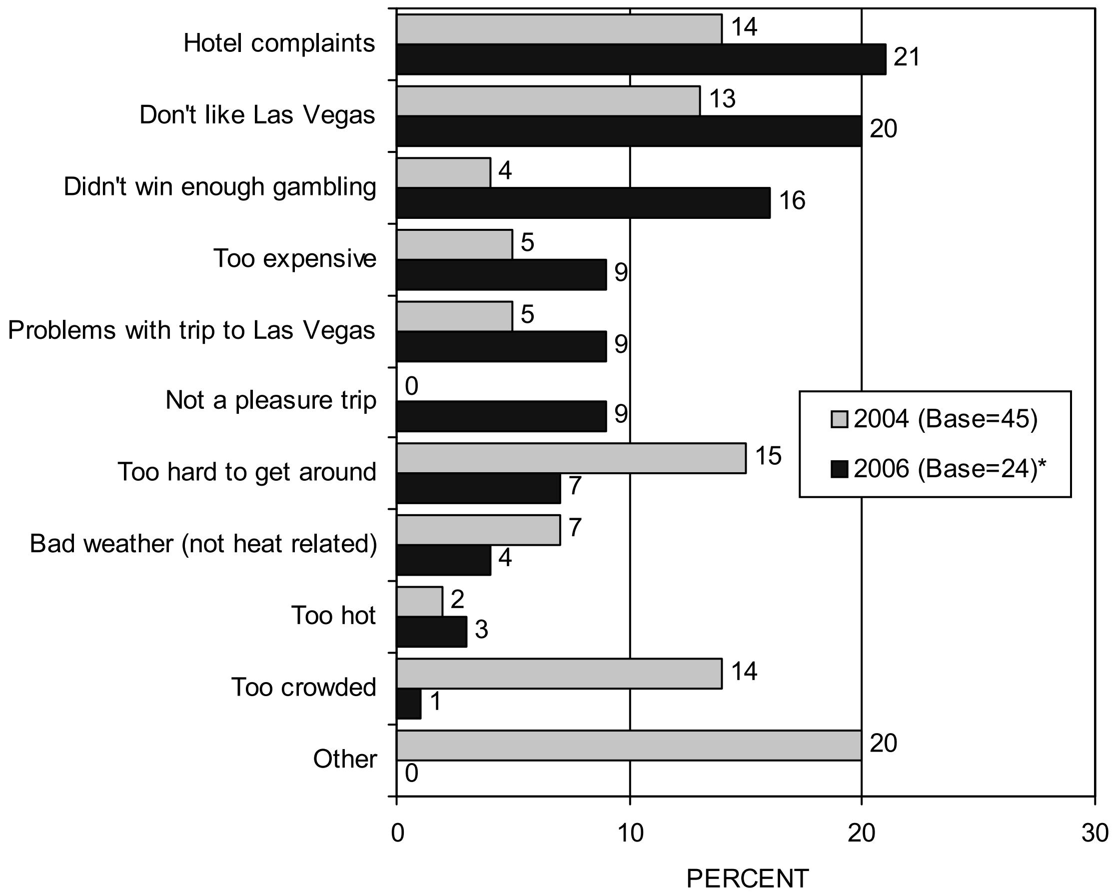
* This question is asked every other year and was not asked in 2003, 2005 or 2007.

FIGURE 68
Why Dissatisfied With Visit*
(Among Those Who Were Dissatisfied – Asked Every Other Year)



The few visitors who said they were dissatisfied with their visit to Las Vegas were asked to volunteer why (Figure 68). The most frequently mentioned reasons for being dissatisfied were hotel complaints (21%), "don't like Las Vegas" (20%), not winning enough gambling (16%), Las Vegas is too expensive (9%), problems with trip to Las Vegas (9%), and that trip was not a pleasure trip (9%).

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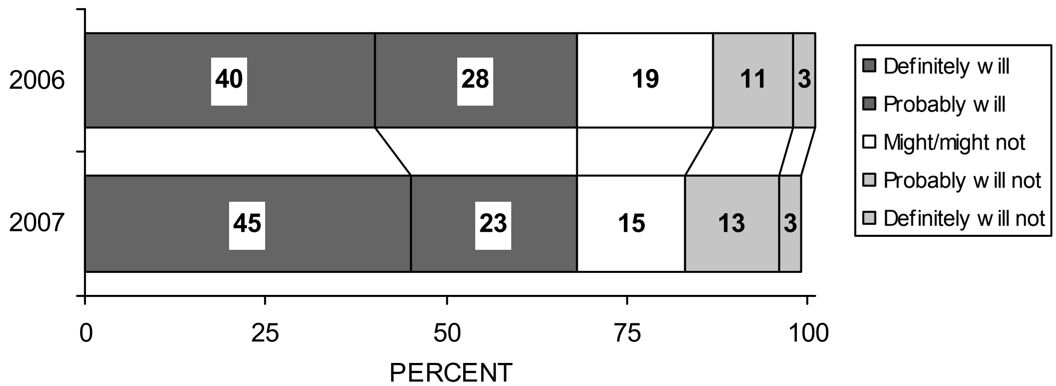
* This question is asked every other year and was not asked in 2003, 2005 or 2007.

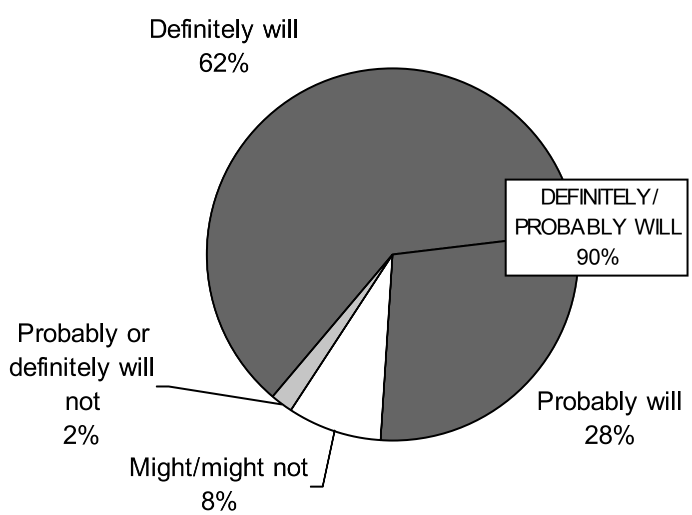
Note very small base size for 2006.

FIGURE 69
Likelihood of Returning to Las Vegas Next Year



Visitors were asked for the first time in 2006 how likely they are to return to Las Vegas the following year (Figure 69), and 68% of visitors in both 2006 and 2007 said they "definitely" or "probably" will.

FIGURE 70
Likelihood of Recommending Las Vegas to Others



In 2007 visitors were also asked how likely they are to recommend Las Vegas to others (Figure 70), and most (90%) said they "definitely" or "probably" will recommend Las Vegas.

VISITOR DEMOGRAPHICS

Visitors in 2007 were likely to be married (79%, the same as last year, but up from 2003 to 2005), earning $40,000 or more (80%, up from 2003 and 2004), and employed (67%). One-quarter were retired (26%, down from 30% in 2003). The proportion of visitors who were 40 years old or older stands at 71%, and the average age is 49.0, up from 47.7 in 2005 and 48.0 last year. More than one-half of visitors were from the western United States (52%), with the bulk of them coming from California (31%). Twelve percent (12%) of visitors were foreign.

FIGURE 71

VISITOR DEMOGRAPHICS*

	2003	2004	2005	2006	2007
GENDER					
Male	50%	52%	51%	52%	50%
Female	50	48	49	48	50
MARITAL STATUS					
Married	73	73	74	79	79
Single	16	17	16	14	14
Separated/Divorced	7	6	7	5	5
Widowed	4	4	3	2	3
EMPLOYMENT					
Employed	64	67	67	70	67
Unemployed	2	1	1	1	1
Student	2	3	3	2	2
Retired	30	26	24	24	26
Homemaker	3	3	5	4	4
EDUCATION					
High school or less	30	27	23	20	27
Some college	27	28	29	26	24
College graduate	41	42	44	48	44
Trade/vocational school	2	4	4	6	5
AGE					
21 to 29	11	13	13	12	11
30 to 39	15	16	20	19	18
40 to 49	21	21	21	22	22
50 to 59	21	21	20	21	20
60 to 64	14	12	11	9	9
65 or older	19	18	16	17	20
MEAN	50.2	49.0	47.7	48.0	49.0
BASE	(3345)	(3300)	(3600)	(3599)	(3596)

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 72

VISITOR DEMOGRAPHICS*

	2003	2004	2005	2006	2007
ETHNICITY					
White	83%	80%	83%	85%	86%
African American/Black	6	6	4	4	5
Asian/Asian American	4	7	5	4	3
Hispanic/Latino	7	7	7	6	5
Other	1	0	1	1	1
HOUSEHOLD INCOME					
Less than $20,000	4	3	1	1	2
$20,000 to $39,999	19	13	6	6	8
$40,000 to $59,999	27	23	18	18	18
$60,000 to $79,999	17	21	24	21	21
$80,000 to $99,999	12	13	15	15	16
$100,000 or more	10	13	22	24	24
Not sure/no answer	12	15	14	15	10
VISITOR ORIGIN					
U.S.A.	88	87	88	87	88
Eastern states†	8	10	9	8	9
Southern states‡	12	13	13	13	13
Midwestern states§	16	17	14	14	14
Western states**	52	48	52	52	52
California	34	31	33	32	31
Southern California	29	27	29	27	25
Northern California	5	4	4	6	6
Arizona	5	6	6	7	9
Other Western states	13	11	13	12	13
No ZIP code given	0	0	0	0	0
Foreign	12	13	12	13	12
BASE	(3345)	(3300)	(3600)	(3599)	(3596)

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

† 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.

APPENDIX:

Aggregate Results for Calendar Year 2007

RESPONDENT ID# ____ ____ ____ ____

INTERVIEW DATE: ____ ____/____ ____/____ ____

INTERVIEW LOCATION CODE ____ ____ ____ ____

TIME STARTED (USE 24-HOUR CLOCK)
____ ____:____ ____

TIME ENDED (USE 24-HOUR CLOCK)
____ ____:____ ____

INTERVIEW LENGTH ____ ____ MIN.

INTERVIEWER ID # ____ ____

RESPONDENT GENDER (BY OBSERVATION)

MALE 50%
FEMALE 50

Hello. I'm ________________ from GLS Research, a national marketing research firm. We are conducting a survey of visitors for the Las Vegas Convention and Visitors Authority. All answers are kept strictly confidential.

1. Are you a visitor to Las Vegas, or are you a resident of Clark County?

VISITOR..................	**ASK Q2**
RESIDENT .... NOT SURE/DK......... REFUSED/NA	**TERMINATE**

2. We are supposed to interview people who are 21 years old or older. Are you 21 years old or older?

YES	**ASK Q3**
NO .... NOT SURE/DK......... REFUSED/NA	**TERMINATE**

3. Will you be leaving Las Vegas within the next 24 hours?

YES	**ASK Q4**
NO .... NOT SURE/DK......... REFUSED/NA	**TERMINATE**

4. Is this your first visit to Las Vegas, or have you visited before?

FIRST VISIT 19%	**SKIP TO Q7 ON PAGE 2**
VISITED BEFORE............81	**ASK Q5**

5. Including this trip, how many times have you visited Las Vegas in the *past 5 years*? **(RECORD NUMBER BELOW AS 2 DIGITS. IF RESPONDENT SAYS "1," CONFIRM THAT THIS IS <u>NOT</u> THE RESPONDENT'S FIRST VISIT.)**

1 ....26%
2-3...28
4-5...14
6-10...18
OVER 10...15
<u>6.32</u> MEAN
<u>3.00</u> MEDIAN

6. Including this trip, how many times have you visited Las Vegas in the *past 12 months*? **(RECORD NUMBER BELOW AS 2 DIGITS.)**

1 ....66%
2-3..24
4-5..7
6 OR MORE...................................3
<u>1.76</u> MEAN
<u>1.00</u> MEDIAN

7. **(ASK OF ALL RESPONDENTS.)** What was the *primary purpose* of *THIS* trip to Las Vegas? **(ASK AS AN OPEN-END. ACCEPT ONLY ONE RESPONSE. WRITE RESPONSE IN BLANK BELOW.)**

TO ATTEND OR WORK AT A CONVENTION/TRADE SHOW	10%
TO ATTEND A CORPORATE MEETING	1
TO GAMBLE	11
INCENTIVE TRAVEL PROGRAM	0
VACATION/PLEASURE	42
VISIT FRIENDS/RELATIVES	13
TO ATTEND A SPECIAL EVENT	5
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT	2%
OTHER BUSINESS PURPOSES	7
JUST PASSING THROUGH	5
WEDDING/TO GET MARRIED	4
SOME OTHER REASON	1
NOT SURE/DK	0
REFUSED/NA	0

8. How important were each of the following in helping you decide to visit Las Vegas this time? Please use a 5-point scale where 1 means "not at all important" and 5 means "very important." (N=1511)

[RANDOMIZE ORDER]	NOT AT ALL IMPORTANT				VERY IMPORTANT	MEAN
a. The shopping	21%	21%	24%	19%	14%	2.84
b. The gambling	16	15	18	16	35	3.39
c. The shows and entertainment	7	16	30	29	18	3.35
d. The clubs and nightlife	46	21	14	11	8	2.13
e. The dining and restaurants	4	19	35	27	15	3.29
f. The golfing	89	6	3	1	1	1.18
g. The spas	78	10	7	3	2	1.41
h. Seeing the resorts	33	5	10	16	35	3.15

9. While in Las Vegas, did you attend or work at a convention, trade show, or corporate meeting?

YES	11%
NO	89
NOT SURE/DK	0
REFUSED/NA	0

10. Were you MORE or LESS interested in attending this convention, trade show, or corporate meeting because it was held in Las Vegas, or did it make NO DIFFERENCE to you that it was held in Las Vegas? (N=387)

MORE INTERESTED	63%
LESS INTERESTED	0
NO DIFFERENCE	36
NOT SURE/DK	0
REFUSED/NA	1

11. Did you travel to Las Vegas by... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)**

Air	46%
Bus (NET)	2
(IF "YES" ASK, "Do you mean...":)	
Regularly scheduled bus service like Greyhound	1
Or a chartered or escorted bus service or bus tour	1
Automobile	47
Truck	1
Motorcycle	0
Recreational Vehicle (RV)	5

12. Which of the following kinds of transportation have you used during your visit? **(READ LIST. ACCEPT MULTIPLE RESPONSES.)**

A. Your own vehicle	46%
B. Rental car	14
C. Limousine	2
D. Bus	18
E. Hotel/motel shuttle	24
H Monorail	13
G. Taxi	27
WALKED	36
OTHER	4

13. How far in advance did you plan this trip to Las Vegas? **(ASK AS OPEN END.)**

SAME DAY	1%
1-3 DAYS BEFORE	3
4-6 DAYS BEFORE	1
7-14 DAYS BEFORE	10
15-30 DAYS BEFORE	23
31-60 DAYS BEFORE	25
61-90 DAYS BEFORE	18
MORE THAN 90 DAYS BEFORE	20
NOT SURE/DK	0
REFUSED/NA	0

14. Did a travel agency assist you in planning your trip?

YES	15%	**ASK Q15**
NO	84	**SKIP TO Q16**
NOT SURE/DK	1	
REFUSED/NA	0	

(ASK ONLY OF THOSE WHO SAID "YES" IN Q14.)

15. Did the travel agent... **(READ LIST)** (N=545)

Influence your decision to visit Las Vegas?	7%
Influence your choice of accommodations?	75
"Book" your accommodations?	88
"Book" your transportation?	93

16. Did you use the Internet in planning your trip?

YES	40%	**ASK Q17**
NO	60	**SKIP TO Q20**
NOT SURE/DK	1	
REFUSED/NA	0	

17. Did you use the Internet to book your transportation? (N=1419)

YES	63%	**ASK Q18**
NO	37	**SKIP TO Q19**
NOT SURE/DK	0	
REFUSED/NA	0	

18. Which website did you use to book your transportation? **(ASK AS AN OPEN END. ACCEPT ONLY ONE RESPONSE).** (N=893)

a. AOL (AMERICA ONLINE)	0%
b. CHEAPTICKETS.	5
c. EXPEDIA.COM	15
d. HOTWIRE.COM	0
e. MAPQUEST.COM	0
f. ORBITZ	4
g. PRICELINE.COM	2
h. TRAVEL.COM	0
i. TRAVELOCITY	8
j. YAHOO	1
k. AIRLINE WEBSITE (ANY)	62
l. OTHER	3
m. NOT SURE/DK	0

(ASK ONLY OF THOSE WHO SAID "YES" IN Q16.)

19. Did you find information on the Internet that... **(READ LIST)** (N=1419)

a. Influenced your decision to visit Las Vegas?	20%
b. Influenced your choice of accommodations?	34

INTERVIEWER!

IF YOU ARE CONDUCTING THE INTERVIEW AT A *DOWNTOWN* LOCATION, CIRCLE "YES" (1) IN Q20 AND ASK Q23. IF YOU ARE *NOT* DOWNTOWN, READ THE FOLLOWING TO RESPONDENT *BEFORE Q20*:

"There are two *main* areas where hotels, motels, and casinos are located in Las Vegas. One area is referred to as The Strip. The Strip includes all the properties on or near Las Vegas Boulevard. The other area is referred to as Downtown Las Vegas. Downtown includes all the properties on or near Fremont Street."

POINT OUT THE "DOWNTOWN" AND "STRIP" AREAS ON THE MAP AS YOU READ THE ABOVE EXPLANATION. IF IT HELPS THE RESPONDENT, ALSO POINT OUT WHERE ON THE MAP YOU ARE CURRENTLY LOCATED.

20. While in Las Vegas, have you visited the Downtown area? **(POINT OUT THE DOWNTOWN AREA ON THE MAP.)**

YES 40%	**SKIP TO Q22**
NO 60	**ASK Q21**
NOT SURE/DK..................0 REFUSED/NA...................0	**SKIP TO Q22**

21. **(ASK ONLY IF "YES" IN Q20.)** What is the <u>MAIN REASON</u> you [visited/are visiting] the Downtown area? **(ASK AS AN OPEN-END. ACCEPT ONLY ONE RESPONSE. WRITE RESPONSE IN BLANK BELOW.)**

(N=1431)

TO SEE FREMONT STREET EXPERIENCE 55%

LODGING DOWNTOWN 20

TO GAMBLE...................................11

TO SHOP 1

TO DINE 1

TO SIGHTSEE (OTHER THAN FREMONT ST. EXPERIENCE).........8

OTHER 3

NOT SURE/DON'T KNOW................0

REFUSED/NO ANSWER 0

22. On this trip to Las Vegas, where did you lodge? **(ASK AS OPEN END. ACCEPT ONLY *ONE* RESPONSE. CIRCLE CODE NUMBER. <u>INTERVIEWER</u>: A "LODGING" IS ANY PLACE THE RESPONDENT *SLEPT* OVERNIGHT. SOME PEOPLE COME TO LAS VEGAS AT NIGHT JUST TO GAMBLE THROUGH THE NIGHT AND LEAVE THE NEXT DAY. THESE PEOPLE DID NOT "LODGE" ANYWHERE.)**

<u>TYPE OF LODGING</u>
(ALL RESPONDENTS)

HOTEL 86%
MOTEL..7
RV PARK 4
FRIENDS/RELATIVES 1
DAYTRIP/NO LODGING 1
OTHER..2

<u>TYPE OF LODGING</u>
(AMONG THOSE WHO STAYED OVERNIGHT)

(N=3572)

HOTEL 86%
MOTEL..7
RV PARK 4
FRIENDS/RELATIVES 1
OTHER..2

<u>LOCATION OF LODGING</u>
(ALL RESPONDENTS)

STRIP CORRIDOR 74%
  ON THE STRIP 56
  JUST OFF THE STRIP 18
DOWNTOWN.. 8
BOULDER STRIP 4
OUTLYING AREAS 13
OTHER.. 2

<u>LOCATION OF LODGING</u>
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=3572)

STRIP CORRIDOR 74%
  ON THE STRIP 56
  JUST OFF THE STRIP 18
DOWNTOWN.. 8
BOULDER STRIP 4
OUTLYING AREAS 13
OTHER.. 1

IF RESPONSE TO Q22 IS RV,
SKIP TO Q33.
ALL OTHERS ANSWER Q24.

24. Which of the following **[SHOW CARD]** best describes how you, or someone in your party, booked your accommodations in Las Vegas? **(ACCEPT ONLY ONE RESPONSE.)**

Booked by phone, calling the hotel, motel, or RV park directly.........51%	**SKIP TO Q26**
Booked through a travel agent (either in person or by phone)......14	
Booked by phone but not by calling the hotel directly and not through a travel agent 4	
Booked at a website on the Internet 24	**ASK Q25**
Booked in person at the hotel, motel, or RV park.................................4	(N=3474)
The trip was a gift, prize, or incentive, so the accommodations were booked for you........1	**SKIP TO Q26**
Not sure because someone else in your party booked the hotel and you don't know how they did it 2	
OTHER (SPECIFY:)........0	
REFUSED/NA 0	

25. Which website did you use to book your accommodations? **(ASK AS AN OPEN END. ACCEPT ONLY ONE RESPONSE).**

(N=844)

a. HOTEL WEBSITE (ANY).............28%
b. HOTELS.COM 17
c. EXPEDIA.COM 15
d. LAS VEGAS.COM 11
e. TRAVELOCITY 7
f. AIRLINE WEBSITE........................ 4
g. ORBITZ.. 3
h. CHEAPTICKETS. 2
i. PRICELINE.COM........................... 2
j. VEGAS.COM 1
k. YAHOO 1
l. OTHER 10
m. NOT SURE/DK 0

26. How far in advance did you make your reservations for your (hotel room/motel room/RV park space) for this trip to Las Vegas? **(ASK AS OPEN END.)** (N=3474)

SAME DAY...............................4%
1-3 DAYS BEFORE 2
4-6 DAYS BEFORE 2
7-14 DAYS BEFORE 16
15-30 DAYS BEFORE 32
31-60 DAYS BEFORE 24
61-90 DAYS BEFORE 11
MORE THAN 90 DAYS BEFORE 10
NOT SURE/DK.........................0
REFUSED/NA 0

27. Including yourself, how many people stayed in your room? (N=3387)

ONE 10%
TWO 76
THREE 7
FOUR 7
FIVE 1
SIX OR MORE 0
REFUSED/NA 0
2.15 MEAN
2.00 MEDIAN

28. Which of the following rate categories best describes your room rate? **(SHOW CARD. ACCEPT ONLY ONE RESPONSE.)**

(N=3318)

HOTEL/TRANSPORTATION PACKAGE DEAL .... 13% HOTEL/AMENITIES PACKAGE DEAL .... 0 TOUR/ TRAVEL GROUP 1	**ASK Q29**
CONVENTION GROUP/ COMPANY MEETING ...... 7 CASINO RATE .... 7 REGULAR FULL-PRICE ROOM RATE 33	**SKIP TO Q31**
CASINO COMPLIMENTARY 14	**SKIP TO Q33**
ANOTHER RATE 26	**SKIP TO Q31**

29. What was the total PER PERSON cost of your package? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS.)**

(N=463)

$0-$99 .... 3%
$100-$199 2
$200-$299 6
$300-$399 12
$400-$499 14
$500-$999 41
$1000 OR MORE 20
NOT SURE/REFUSED 2
$709.90 MEAN
$600.00 MEDIAN

30. Where did you first hear about this package? **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=463)

NEWSPAPER 4%
TELEVISION 1
TRAVEL AGENT 51
WORD OF MOUTH 3
OFFER RECEIVED IN THE MAIL 0
BROCHURE 0
E-MAIL OFFER 0
INTERNET AD 6
ANY WEBSITE 32
RESERVATION AGENT/ CALL CENTER 2
OTHER 0
NOT SURE/NO ANSWER 0

PACKAGE VISITORS SKIP TO Q33

31. **(ASK ONLY OF NON-PACKAGE VISITORS)** By the time you leave Las Vegas, how much will you have spent, *on average per night*, on your hotel or motel room? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

(N=2384)

$0-$35 .... 2%
$36-$50 11
$51-$100 49
$101 OR MORE 36
NOT SURE/REFUSED 2
$108.87 MEAN
$90.00 MEDIAN

32. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=2384)

NEWSPAPER.................................... 0%
TELEVISION.................................... 0
RADIO 0
TRAVEL AGENT 8
WORD-OF-MOUTH.......................... 6
OFFER RECEIVED IN THE MAIL..................................... 9
BROCHURE 0
E-MAIL OFFER................................ 1
INTERNET AD (POP-UP OR BANNER AD) 3
ANY WEBSITE 25
OUTDOOR BILLBOARD 0
RESERVATION AGENT/ CALL CENTER 46
OTHER 0
NOT SURE/DK 1

33. **(ASK OF ALL RESPONDENTS.)** Including yourself, how many *adults* 21 years old or older are in your *IMMEDIATE* party (such as a spouse or friends who are traveling with you)?

1..8%
2...69
3..7
4...11
5 OR MORE 6
2.49 MEAN
2.00 MEDIAN

34. Are there any people *under the age of 21* in your *IMMEDIATE* party?

YES 8%
NO 93

35. By the time you leave, how many nights will you have stayed in Las Vegas? (WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)

0 .... 1%
1 7
2 23
3 28
4 19
5 OR MORE............................ 22
3.51 MEAN
3.00 MEDIAN

36. By the time you leave, how many *days* will you have been in Las Vegas?

1 .... 1%
2 7
3 23
4 28
5 19
6 OR MORE............................ 22
4.51 MEAN
4.00 MEDIAN

37. On what day of the week did you arrive in Las Vegas?

SUNDAY 16%
MONDAY 15
TUESDAY 13
WEDNESDAY 13
THURSDAY 14
FRIDAY 19
SATURDAY............................11

38. Have you gambled during this visit to Las Vegas?

YES 84%	**ASK Q39**
NO 16	**SKIP TO Q43**

39. On average, how many hours *PER DAY* did you spend gambling? **(IF GREATER THAN 12, CLARIFY BY ASKING:** "Do you mean that you spent on average **[FILL IN NUMBER OF HOURS]** hours gambling *every day you were here*?" (N=3023)

2 OR LESS.......................... 48%
   LESS THAN 1 HOUR....... 18
   ONE HOUR 12
   TWO HOURS 19
3 TO 4.................................. 21
5 TO 6.................................. 16
7 TO 8.................................... 9
9 TO 10.................................. 4
MORE THAN 10.................... 2
3.39 MEAN
3.00 MEDIAN

40. Which type of casino game do you play MOST OFTEN. **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=3023)

SLOT MACHINES 65%
VIDEO POKER.......................................6
OTHER VIDEO MACHINES (21, KENO, ETC.)..................................1
BLACKJACK 14
CRAPS 4
OTHER TABLE GAMES 8
OTHER..2
NOT SURE/DK......................................0
REFUSED/NA 0

41. Not including travel, food, or lodging, how much money did you budget for gambling on this trip? Include only your own, personal, gambling budget and not the gambling budgets of others who may have been with you. (N=3023)

$0-$99... 15%
$100-$199....................................... 17
$200-$299....................................... 14
$300-$399.. 9
$400-$499.. 6
$500-$599....................................... 12
$600 OR MORE............................... 22
NOT SURE/REFUSED 5
$555.64 MEAN
$300.00 MEDIAN

42. Where have you gambled during your visit to Las Vegas? **(READ LIST. ACCEPT MULTIPLE RESPONSES.)** (N=3023)

Downtown Las Vegas (that is, on or near Fremont Street)........................30%
Strip Corridor (that is, on Las Vegas Boulevard and just off the Strip)........86
Boulder Hwy & Henderson (Sam's Town, Showboat, Nevada Palace, etc.) 7
North Las Vegas (Santa Fe, Texas Station, Fiesta, etc.)............................5
Outlying areas (Jean, Mesquite, Searchlight, etc.) 3
OTHER..2

43. **(ASK OF EVERYONE.)** *Now that there are more places to gamble outside of Las Vegas*, do you feel you are MORE LIKELY or LESS LIKELY to visit Las Vegas, or does it make NO DIFFERENCE in your decision to visit Las Vegas? **(IF MORE OR LESS LIKELY, ASK:)** Is that MUCH (more/less likely) or SOMEWHAT (more/less likely)?

5 -MUCH MORE LIKELY 18%
4 -SOMEWHAT MORE LIKELY...... 30
3 -NO DIFFERENCE 52
2 -SOMEWHAT LESS LIKELY 0
1 -MUCH LESS LIKELY.................... 0
NOT SURE/DK.................................. 0
REFUSED/NA 0
3.66 MEAN
3.00 MEDIAN

44. Which of the following types of entertainment have you seen during this trip to Las Vegas? **(START WITH ITEM CHECKED AND CONTINUE UNTIL ALL ITEMS ARE ASKED. ASK BUT DO NOT ROTATE "OTHER". ACCEPT MULTIPLE RESPONSES.)**

45. **(ASK FOR EVERY "YES" IN Q44.)** And how many **(INSERT EACH TYPE MENTIONED IN Q43)** have you seen during this trip? **(RECORD TWO-DIGIT NUMBER IN APPROPRIATE BLANKS.)**

	Q44				Q45	
	YES	NO	DK	NA	MEAN	
A. Big-name headliner performers in Las Vegas for a special concert (for example, Elton John, Jerry Seinfeld, Barry Manilow, Tim McGraw, Faith Hill, etc.)	12%	88%	0%	0%	1.10	(N=421)
B. Comedy shows or revues (for example, Improv, Comedy Stop, etc.)	13	87	0	0	1.09	(N=471)
C. Lounge acts or other kinds of free entertainment provided at a location other than the "main" show room	41	59	0	0	1.93	(N=1455)

48. **(INTERVIEWER: IF RESPONDENT HAS NOT SEEN ANY SHOWS, CIRCLE "YES" HERE.)**

YES (HAS *NOT* SEEN ANY SHOWS)	NO (HAS SEEN SHOWS)
37%	63%

49. On this trip to Las Vegas, have you been to other Las Vegas attractions for which you have to pay — for example, the Mandalay Bay Shark Reef, the Stratosphere Observation Tower and Rides, Star Trek: The Experience, New York New York "Manhattan Express" rollercoaster, etc.?

YES 22%
NO 78
NOT SURE/DK 0
REFUSED/NA 0

50. On this trip, will you (or did you) visit... **(READ LIST. ACCEPT MULTIPLE RESPONSES.)**

A. A nightclub in a hotel with a cover charge? 4%
B. A free-standing nightclub with a cover charge? 0
C. A bar or lounge in a hotel without a cover charge? 34
D. Any free-standing bar or lounge without a cover charge? 1

51. Did you play golf while visiting Las Vegas?

YES 1%
NO 99

52. By the time you leave Las Vegas, how much will you have spent *ON AVERAGE PER DAY* for...

a. Food and drink. Please include only your own, personal expenses and not those of your entire party. **(ROUND TO THE NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

$254.49 MEAN (INCLUDING $0)
$254.80 MEAN (EXCLUDING $0)

b. Local transportation (for example, car rental, taxi, limo, gas). Please include all your daily transportation expenses. **(ROUND TO THE NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

$62.66 MEAN (INCLUDING $0)
$96.92 MEAN (EXCLUDING $0)

53. By the time you leave Las Vegas, how much will you have spent on each of the following items *IN TOTAL FOR YOUR ENTIRE TRIP*? Please include only your own, personal expenses and not those of your entire party. **(READ EACH ITEM. ROUND TO THE NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

A. Shopping (gifts, clothing, personal items)	$114.50	MEAN (INCLUDING $0)
	$183.38	MEAN (EXCLUDING $0)
B. Shows/entertainment (not including gambling)	$47.87	MEAN (INCLUDING $0)
	$107.05	MEAN (EXCLUDING $0)
C. Sightseeing	$8.31	MEAN (INCLUDING $0)
	$189.92	MEAN (EXCLUDING $0)
X. Other	$5.11	MEAN (INCLUDING $0)
	$254.33	MEAN (EXCLUDING $0)

Just a few more questions on your impressions of Las Vegas in general…

54. Overall, how satisfied were you with your visit to Las Vegas? Were you... (READ LIST.)

Very satisfied................................89%
Somewhat satisfied......................11
Somewhat dissatisfied....................1
Very dissatisfied.............................0
DO NOT READ
NOT SURE/DK...............................0
REFUSED/NA................................0

55. How likely will you be to return to Las Vegas in the next year? Would you say you…

Definitely will (5)..........................45%
Probably will (4)...........................23
Might/might not (3)......................15
Probably will not (2).....................13
Definitely will not (1)......................3
NOT SURE/NO ANSWER.............2

3.97 MEAN

56. How likely will you be to recommend Las Vegas to friends, relatives, and co-workers as a destination for a vacation or pleasure trip? Would you say you… **(READ FIRST 5 RESPONSES)**

Definitely will recommend (5)......62%
Probably will recommend (4).......28
Might/might not recommend (3)....8
Probably will not recommend (2)...2
Definitely will not recommend (1)..0
NOT SURE/NO ANSWER.............0

4.51 MEAN

Now I'd like to ask you a few final questions for statistical purposes.

57. Are you currently... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)**

Employed 67%	**ASK Q58**
Unemployed .... 1 Student .... 2 Retired .... 26 Homemaker 4	**SKIP TO Q59**
<u>DO NOT READ</u> REFUSED/NA 0	**SKIP TO Q59**

58. What is your occupation? **(SPECIFY OCCUPATION, NOT TITLE OR COMPANY NAME. "SELF EMPLOYED" IS <u>NOT</u> AN ACCEPTABLE RESPONSE. PROBE FOR THE TYPE OF WORK DONE.)**

(N=2425)

- Professional/technical 25%
- Managers/proprietors 21
- Sales/clerical 30
- Craft workers 8
- Service workers 15
- Laborers (non-agricultural) 1
- Agricultural 1

59. What was the last grade or year of school that you completed? **(DO NOT READ LIST.)**

- GRADE SCHOOL OR SOME HIGH SCHOOL 0%
- HIGH SCHOOL DIPLOMA (FINISHED GRADE 12) 27
- SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE)..24
- GRADUATED COLLEGE 33
- GRADUATE SCHOOL (MASTER'S OR PH.D.).......................10
- TECHNICAL, VOCATIONAL, OR TRADE SCHOOL 5
- REFUSED/NA 0

60. What is your marital status? Are you... **(READ FIRST 4 ITEMS IN LIST.)**

- Married 79%
- Single 14
- Separated or divorced...........................5
- Widowed 3
- REFUSED/NA 0

61. What country do you live in?

USA 88%	**ASK Q62**
FOREIGN 12	**SKIP TO Q63**

62. What is your zip code, please?
REGION FROM ZIP CODE

EAST 9%
SOUTH 13
MIDWEST 14
WEST 52
CALIFORNIA...................................31
NORTHERN CA. 6
SOUTHERN CA. 25
ARIZONA 9
OTHER WEST 13
FOREIGN VISITORS 12

63. **(ETHNICITY BY OBSERVATION. IF UNSURE, ASK:)** Most people think of themselves as belonging to a particular ethnic or racial group. What ethnic or racial group are you a member of? (**ASK ONLY IF NECESSARY:** Are you white, Black or African American, Asian or Asian American, Hispanic or Latino — or of some other ethnic or racial background?)

WHITE 86%
BLACK OR AFRICAN AMERICAN....... 5
ASIAN OR ASIAN AMERICAN............. 3
HISPANIC/LATINO.............................. 5
NATIVE AMERICAN,
MIXED RACE, OTHER........................ 1

64. What is your age, please? **(RECORD IT EXACTLY *AND CIRCLE APPROPRIATE CATEGORY BELOW.*)**

48.97 MEAN
49.00 MEDIAN

Which of the following categories does your age fall into? **(READ LIST.)**

21 to 29 .... 11%
30 to 39 18
40 to 49 22
50 to 59 20
60 to 64 9
65 and older 20
REFUSED/NA 0

65. Please tell me which one of these categories includes your total household income before taxes last year. **(SHOW INCOME CARD.)** Include your own income and that of any member of your household who is living with you.

A. Less than $20,000 .... 2%
B. $20,000 to $29,999......................... 2
C. $30,000 to $39,999......................... 6
D. $40,000 to $49,999......................... 9
E. $50,000 to $59,999........................ 9
F. $60,000 to $69,999....................... 11
G. $70,000 to $79,999....................... 10
H. $80,000 to $89,999....................... 11
I. $90,000 to $99,999......................... 6
J. $100,000 to $149,999................... 22
K. $150,000 or more 2
NOT SURE/NO ANSWER 10

CARD A

HOTEL/MOTEL RATES

1. **HOTEL/TRANSPORTATION PACKAGE DEAL**
   One price that includes your hotel room ***and*** airfare or bus transportation to Las Vegas. The package may or may not also include other items such as shows or meals.

2. **HOTEL/AMENITIES PACKAGE DEAL (NO TRANSPORTATION INCLUDED)***
   One price that includes your hotel room ***and*** other items such as shows, meals, or other amenities, but ***does not*** include airfare or bus transportation to Las Vegas.

3. **TOUR/TRAVEL GROUP**
   You are traveling as part of a tour or travel group. The tour/travel group package price includes room ***and*** airfare or bus transportation to Las Vegas. The package may or may not also include other items such as shows or meals.

4. **CONVENTION GROUP/COMPANY MEETING**
   Arranged through an employer or convention.

5. **CASINO RATE**
   Special reduced rate arranged through a casino host or casino employee.

6. **REGULAR FULL-PRICE ROOM RATE**
   Full price, no discounts.

7. **CASINO COMPLIMENTARY**
   Room is free of charge.

8. **ANOTHER RATE**
   Any other special room rate not shown above.

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* This option was added in 2004.

CARD B

INCOME CATEGORIES

A. Less than $20,000

B. $20,000 to $29,999

C. $30,000 to $39,999

D. $40,000 to $49,999

E. $50,000 to $59,999

F. $60,000 to $69,999

G. $70,000 to $79,999

H. $80,000 to $89,999

I. $90,000 to $99,999

J. $100,000 to $149,999

K. $150,000 or more