

LAS VEGAS VISITOR PROFILE

Calendar Year 2012

Internet Travel Planners Version

Research that works.

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VISITOR PROFILE STUDY

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EXECUTIVE SUMMARY

The Las Vegas Visitor Profile Study is conducted monthly and reported annually to provide an ongoing assessment of the Las Vegas visitor and trends in visitor behavior over time. This report presents the findings from the 3,600 personal interviews conducted by GLS Research throughout calendar year 2012.

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.

Visitors who used the Internet to help plan their current trip to Las Vegas and visitors who did not are the focus of this report. The tables and charts in this report show data for all visitors and for the two visitor subgroups:

- **INTERNET TRAVEL PLANNERS/USERS** — visitors who used the Internet to assist in the planning of their current trip to Las Vegas — 60% of all visitors.
- **NON-INTERNET PLANNERS/USERS** — visitors who did not use the Internet to help with travel planning (includes some Internet users who did not use it for travel planning on their current trip) — 40% of all visitors.

This section presents the research highlights. The findings are presented in detail beginning on page 16.

REASONS FOR VISITING

- Most visitors (84%) have visited Las Vegas in the past. However, visitors who used the Internet for travel planning (17%) were significantly more likely than those who did not (14%) to be first-time visitors.
- Among all visitors, the mean (average) number of visits to Las Vegas during the past five years was 5.8 visits. The average number of visits during that time was significantly lower for Internet travel planners (mean of 4.4 visits) than non-Internet users (7.8 visits).
- Looking only at repeat visitors, the mean (average) number of visits to Las Vegas during the past five years was 6.7. Internet travel planners made significantly fewer visits to Las Vegas in the past five years (mean of 5.1 visits) than non-Internet users (8.9 visits).
- Among all visitors, the average number of visits in the past year was 1.6. On average, Internet travel planners (1.4 visits) visited less frequently during the past year than non-Internet users (2.0 visits).
- Among those who had been to Las Vegas before, the average number of visits in the past year was 1.7. Again, Internet travel planners (mean of 1.4 visits) visited Las Vegas less frequently in the past year than visitors who did not use the Internet for travel planning (2.2 visits).
- Looking at the purpose of their *current visit* among all visitors, Internet travel planners were significantly more likely than non-Internet users to say they were visiting Las Vegas primarily for vacation or pleasure (51% vs. 40%). Internet travel planners were also more likely than non-Internet users to be visiting Las Vegas to attend a special event (9% vs. 5%) or a wedding (5% vs. 3%). Non-Internet users were more likely than Internet travel planners to be visiting Las Vegas primarily to gamble (12% vs. 5%), to visit friends and relatives (17% vs. 11%), or for business purposes other than a convention or corporate meeting (10% vs. 5%).
- Looking at the primary purpose among repeat visitors for their *current visit*, Internet travel planners were significantly

more likely than non-Internet users to have visited Las Vegas primarily for vacation or pleasure (47% vs. 37%). Internet travel planners were also more likely than non-Internet users to be visiting Las Vegas to attend a convention or corporate meeting (10% vs. 8%), to attend a special event (11% vs. 5%), or a wedding (5% vs. 3%). Non-Internet users were more likely than Internet travel planners to be visiting Las Vegas primarily to gamble (14% vs. 6%), to visit friends or relatives (17% vs. 12%), or for business purposes other than a convention or corporate meeting (11% vs. 6%).

- We also looked at the purpose of the current visit among those who were making their first trip to Las Vegas. Two-thirds (66%) of all first-time visitors said they were visiting Las Vegas primarily for vacation or pleasure. There were no significant differences between Internet travel planners and non-Internet users on this measure.
- Respondents were asked if they participated in or attended a convention or trade show while they were in Las Vegas, and 9% said they had. There was no significant difference between Internet and non-Internet users on this measure.
- 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. Forty-six percent (46%) said having the convention in Las Vegas made them more interested in attending, while 52% said it made no difference, and 1% said it made them less interested in attending. There were no significant differences between Internet and non-Internet users on this measure.
- Convention visitors were asked if they had brought with them a spouse, family member, or friend who was not attending or working at the convention, trade show, or corporate meeting. Thirty-six percent (36%) said they had. There was no significant difference between Internet and non-Internet users on this measure.

TRAVEL PLANNING

- Internet travel planners tended to plan their trip to Las Vegas farther in advance than those who did not use the Internet to plan their trip. Internet travel planners were significantly more likely than non-Internet users to have planned their trip more than one month in advance (51% vs. 39%). Conversely, those who did not use the Internet to plan their trip were significantly more likely than Internet travel planners to have planned their trip to Las Vegas two weeks or less in advance (28% vs. 16%).
- Internet travel planners were significantly more likely than non-Internet users to have traveled to Las Vegas by air (54% vs. 28%) and significantly less likely than non-Internet users to have traveled to Las Vegas by auto, bus, or RV (46% vs. 72%).
- Visitors were asked about the types of local transportation they had used while in Las Vegas. Internet travel planners were significantly more likely than non-Internet users to have used many forms of local transportation, including taxis (34% vs. 21%), hotel/motel shuttles (16% vs. 11%), and rental cars (16% vs. 8%). Internet travel planners were also significantly more likely than non-Internet users to volunteer that they walked around Las Vegas (50% vs. 45%). Non-Internet users, however, were more likely than Internet travel planners to say they used their own vehicle for transportation while in Las Vegas (58% vs. 39%).
- Most visitors (97%) decided where to stay before leaving home. Internet travel planners (98%) were significantly more likely than non-Internet users (94%) to say they decided where to stay before arrival. Non-Internet users (6%) were significantly more likely than Internet travel planners (2%) to say they decided where to stay after arrival.
- The majority of visitors (60%) decided where to gamble after arriving in Las Vegas. Internet travel planners (65%) were significantly more likely than non-Internet users (53%) to say they decided where to gamble after arrival.
- While most visitors (67%) decided which shows to see after arrival, one in three (33%) decided before leaving home.

There was no significant difference between Internet and non-Internet users on this measure.

- Internet travel planners were significantly less likely to have used a travel agent for their current trip to Las Vegas than non-Internet travel users (9% vs. 20%).
- Among those who used a travel agent for their most recent trip to Las Vegas, most visitors said the travel agent helped them book their transportation (92%) or accommodations (82%). About seven in ten (72%) said the travel agent influenced their choice of accommodations in Las Vegas. Internet travel planners were significantly more likely than non-Internet users to say a travel agent influenced their choice of accommodations (79% vs. 67%), while non-Internet users were more likely than Internet travel planners to say the travel agent booked their accommodations (86% vs. 75%).
- Visitors were asked if they used any social media web sites, such as Facebook, Twitter, or others, to help in planning their trip to Las Vegas. About one in three (32%) Internet travel planners said they had.
- Two-thirds (66%) of Internet travel planners said they used the Internet to book their accommodations in Las Vegas on their current trip, while almost one-half (47%) said they booked their transportation to Las Vegas online. More than one-half (54%) of online travel planners also said the Internet influenced their choice of accommodations.
- Internet travel planners who had booked their transportation to Las Vegas online were also asked to name the website they used to do so. Almost two-thirds (64%) mentioned airline websites, followed by Expedia (11%), Travelocity (7%), and Priceline (5%). A smaller number of visitors used other websites.
- Internet travel planners who booked their accommodations in Las Vegas online were asked to name the website they had used to do so. Hotel websites (32%) were mentioned the most often, followed by Expedia (15%), Hotels.com (14%), LasVegas.com (8%), Travelocity (6%), and Priceline

- (6%). Smaller proportions of visitors used several other websites.
- Thirty-six percent (36%) of all visitors said they had visited Downtown Las Vegas on their current trip. Internet travel planners (38%) were significantly more likely than non-Internet users (33%) to have visited Downtown.
 - Non-Internet users were more likely than Internet travel planners to say they were not interested in Downtown (61% vs. 52%) or that Downtown was inconvenient and out of the way (5% vs. 2%). Internet travel planners were significantly more likely than non-Internet users to say they did not have enough time (23% vs. 18%) or that they were unfamiliar with Downtown (15% vs. 10%).
 - Visitors were asked if they visited any nearby places either before or after their trip to Las Vegas. Overall, 14% of visitors said they had. There was no significant difference between Internet and non-Internet users on this measure.
 - Visitors were asked what other nearby destinations they had visited or planned to visit. The most common destinations mentioned were the Grand Canyon (61%) and Hoover Dam (57%). Non-Internet users were significantly more likely than Internet travel planners to visit the Grand Canyon (78% vs. 49%) or Laughlin (14% vs. 2%).

TRIP CHARACTERISTICS AND EXPENDITURES

- The average number of adults in immediate party for all visitors in 2012 was 2.4. Internet travel planners (2.5) had a larger average party size than non-Internet users (2.4).
- Eleven percent (11%) of Las Vegas visitors were traveling with people under the age of 21. There was no significant difference between Internet and non-Internet users on this measure.
- In terms of length of stay in Las Vegas, visitors stayed an average of 3.3 nights and 4.3 days. There was no significant difference between Internet and non-Internet users on this measure.

- All respondents were asked on what day of the week they arrived in Las Vegas. Visitors were most likely to arrive on a Friday (19%). Internet travel planners were significantly more likely than non-Internet users to arrive on a Thursday (16% vs. 13%).
- Among those who stayed overnight in Las Vegas, the vast majority (92%) stayed in a hotel. Internet travel planners (94%) were significantly more likely than non-Internet users (89%) to have stayed in a hotel. Non-Internet users were more likely than Internet travel planners to have stayed in an RV park (5% vs. 1%), or with friends or relatives (3% vs. 1%).
- Among those who lodged overnight in Las Vegas, Internet travel planners were significantly more likely than non-Internet users to have stayed on the Strip Corridor* (83% vs. 68%). Conversely, non-Internet users were more likely than Internet travel planners to have lodged either Downtown (8% vs. 4%), on the Boulder Strip (5% vs. 1%), or in outlying areas (15% vs. 10%).
- We asked visitors who lodged in a hotel, motel, or RV park, how they had booked their accommodations. Two-thirds of Internet travel planners (67%) said they booked their accommodations through an Internet website, while non-Internet users were most likely to say they booked their accommodations by calling the property directly (59% vs. 20% of Internet users). Non-Internet users were also more likely than Internet travel planners to use other booking methods including a travel agent (19% vs. 7%) or booking in person (6% vs. 1%).
- Among those visitors who stayed in a hotel, motel, or RV park, Internet travel planners tended to make their lodging arrangements farther in advance than non-Internet users. For example, Internet travel planners were more likely to make their lodging reservations two weeks to one month in advance (50% compared to 35% of non-Internet users). By contrast, non-Internet users were more likely than Internet users to book their accommodations two weeks or less before they arrived (40% vs. 27%).

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

- Looking at the type of room rates received by hotel/motel lodgers, Internet travel planners were more likely than non-Internet users to have paid a regular room rate (36% vs. 25%) or some other rate (32% vs. 23%) – but they were less likely than non-Internet users to have received a casino rate (5% vs. 9%) or casino complimentary rate (8% vs. 24%).
- Fourteen percent (14%) of hotel/motel lodgers were visiting Las Vegas as part of a tour group or package deal. There was no significant difference between Internet travel planners and non-Internet users on this measure.
- We asked those who purchased either a hotel or a tour/travel group package how much their package cost per person. On average, package costs were significantly higher for non-Internet users (mean of \$983.31) than for Internet travel planners (mean of \$608.03).
- Package purchasers were asked where they first heard about the package they bought. As might be expected, Internet travel planners were most likely to have first heard about their package from a website (37% vs. 2% of non-Internet travel planners). More than one-quarter (28%) of Internet travel planners heard of the package from an Internet advertisement. Package purchasers who did not use the Internet to plan their trip to Las Vegas were significantly more likely than Internet planners to have first learned about their package through a travel agent (84% vs. 25%).
- We also looked at lodging expenditures among visitors whose room was *not* part of a travel package. Among these visitors, the average daily room rate paid by Internet travel planners was \$95.05, while non-Internet users paid an average of \$89.11. This difference was not statistically significant. However, Internet travel planners were significantly more likely than non-Internet users to pay more than \$100 for their lodging (32% vs. 25%).
- Visitors who paid a non-package rate were asked how they first found out about the room rate they paid. Again, Internet travel planners were most likely to have mentioned a website (57% vs. 3% of non-Internet users) or an Internet ad (17%). Visitors who did not use the Internet to plan their travel were

significantly more likely than Internet planners to mention a reservation agent or call center (53% vs. 12%), word-of-mouth (20% vs. 5%), a travel agent (11% vs. 4%), or direct mail (5% vs. 2%).

- Among visitors who stayed in a hotel or motel, most (71%) said that two people stayed in their room. However, Internet travel planners were significantly more likely than non-Internet users to say four or more people stayed in their room (10% vs. 8%), while non-Internet users were significantly more likely than Internet travel planners to say they were lodging alone (15% vs. 12%). The average number of room occupants was significantly higher for Internet travel planners (2.2) than for non-Internet users (2.1).
- Looking at the average trip expenditures on food and drink and on local transportation, *including visitors who said they spent nothing in these categories* On average, Internet travel planners spent significantly more for food and drink (mean of \$280.47) than non-Internet users (\$242.28). Internet travel planners also spent significantly more on average for local transportation (mean of \$67.48) than non-Internet users (\$43.38).
- Among those who actually spent money in these categories, Internet travel planners again spent more for food and drink (mean of \$281.00) than non-Internet users (\$243.78). Internet travel planners also spent more on local transportation (\$102.31) than non-Internet users (\$79.69).
- Average expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas, *including visitors who said they spent nothing in these categories*, were examined. Overall, visitors spent an average of \$149.29 on shopping and \$9.63 on sightseeing. Internet travel planners spent significantly more on average for shows (\$50.96) than non-Internet users (\$30.89).
- Among visitors who actually spent money in these categories, the overall average amount spent on shopping was \$259.00, with no significant difference between the amount spent by Internet travel planners (\$261.28) and non-Internet users (\$255.29) in this category. The overall

average spent by visitors who spent money on shows and entertainment was \$123.43, again with no significant difference between the amount spent by Internet travel planners (\$124.13) and non-Internet users (\$121.58). However, non-Internet users spent significantly more on sightseeing on average (\$169.97) than Internet travel planners (\$97.54).

GAMING BEHAVIOR AND BUDGETS

- Seventy-two percent (72%) of all visitors gambled while in Las Vegas. Non-Internet users were significantly more likely to gamble than Internet travel planners (75% vs. 70%).
- Among those who gambled while in Las Vegas, Internet travel planners spent significantly less time gambling (average of 2.3 hours per day) than non-Internet users (3.1 hours per day).
- All visitors to Las Vegas were asked how many casinos they had visited. Internet travel planners visited significantly more casinos on average (6.1) than non-Internet users (5.3).
- All visitors to Las Vegas were asked in how many casinos they had gambled. Internet travel planners gambled in an average of 2.3 casinos, while non-Internet users gambled at an average of 2.4 casinos. This difference was not statistically significant.
- Overall, Las Vegas visitors who gambled on their current trip budgeted an average of \$484.70 for gambling. Internet travel planners (mean of \$439.94) budgeted significantly less on gambling than non-Internet users (mean of \$546.82).
- All visitors to Las Vegas were asked whether they feel they are now more or less likely to visit because there are now more places to gamble outside of Las Vegas. Non-Internet users were significantly more likely than Internet travel planners to say that outside gaming venues actually made them *more likely to visit* (38% vs. 17%). Internet travel planners were more likely than non-Internet users to say outside gaming venues made no difference in their decision to visit Las Vegas (82% vs. 62%).

ENTERTAINMENT

- During their stay in Las Vegas, Internet travel planners were significantly more likely than non-Internet users to have seen at least one show (73% vs. 54%).
- Among those who saw a show while on their most recent trip to Las Vegas, Internet travel planners were significantly more likely than non-Internet users to have seen a lounge act (82% vs. 70%) or a magic act (6% vs. 3%).
- Visitors who saw shows were asked how many shows they saw of each type. On average, Internet travel planners saw significantly more lounge acts (average of 2.0 shows) than non-Internet users (1.8).
- Visitors who did not attend any shows while in Las Vegas were asked why. The most common reason cited was being too busy or not having enough time (54%). Internet travel planners were significantly more likely than non-Internet users to say they were too busy (57% vs. 51%) but less likely to say it was because they were not interested in shows (24% vs. 33%).
- We asked visitors if during their current trip to Las Vegas they had been to other Las Vegas attractions for which they had to pay — such as theme parks, water parks, or virtual reality rides. Internet travel planners were significantly more likely to have done so than non-Internet users (15% vs. 10%).
- Visitors were asked if they visited nightclubs, bars, lounges, or pool parties or day clubs while in Las Vegas. Internet travel planners were significantly more likely than non-Internet users to say they had been to a no-cover hotel bar or lounge (38% vs. 28%), a hotel nightclub with a cover (11% vs. 5%), or a pool party or day club (2% vs. less than 1%).
- Visitors were asked if they had visited a spa during this trip to Las Vegas. Internet travel planners (4%) were significantly more likely than non-Internet users (2%) to say they had visited a spa.

ATTITUDINAL INFORMATION

- Ninety-four percent (94%) of all visitors said that they were “very satisfied” with their visit to Las Vegas. There was no significant difference between Internet travel planners and non-Internet users on this measure.
- Visitors who were not completely satisfied with their visit were asked to volunteer why. Internet travel planners were significantly more likely than non-Internet users to say they thought Las Vegas was too expensive (15% vs. 5%). Non-Internet users were more likely than Internet travel planners to say it was because they were in town on business, not pleasure (18% vs. 4%).

VISITOR DEMOGRAPHICS

- Internet travel planners were more likely than non-Internet users to be female (51% vs. 47%), employed (74% vs. 90%) and less likely to be retired (13% vs. 28%); more educated (54% are college graduates vs. 49% of non-Internet users); single (21% vs. 14%) and less likely to be married (73% vs. 78%); younger (average age of 42.5 years vs. 48.2 years for non-Internet users); white (78% vs. 72%); and earning household incomes of \$100,000 or more (28% vs. 24% of non-Internet users); and less likely to be from a western state (48% vs. 63%), especially Southern California (28% vs. 40%).

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.

This report focuses on the use of the Internet to assist travel planning to Las Vegas during calendar year 2012 (January 1, 2012 through December 31, 2012). The tables and charts in this report show data for all visitors and for the two visitor subgroups:

- **INTERNET TRAVEL PLANNERS/USERS** — visitors who used the Internet to assist in the planning of their current trip to Las Vegas — 60% of all visitors.
- **NON-INTERNET PLANNERS/USERS** — visitors who did not use the Internet to help with travel planning (includes some Internet users who did not use it for travel planning on their current trip) — 40% of all visitors.

METHODOLOGY

In-person interviews were conducted with 3,600 randomly selected visitors. Three-hundred (300) interviews were conducted each month for 12 months from January through December 2012 (From 2005 – 2010, GLS Research, in consultation with the LVCVA, used a 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 been weighted to more accurately reflect actual visitors to Las Vegas in terms of mode of transportation, lodging location, and month of visit. Specifically, the mode of transportation weight is derived from a compilation of data provided by the LVCVA, McCarran International Airport, and the Nevada Department of Transportation. The lodging location weight is derived from geographic area specific occupancy rates from independent surveys conducted by the LVCVA. The month of visit weight is derived from monthly room nights occupied data, also from independent surveys conducted by the LVCVA as part of their ongoing room occupancy audit.

Visitors were intercepted in the vicinity of Las Vegas casinos, hotels, motels, and 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 “thank you’s.” Verification procedures were conducted throughout the project to assure accurate and valid interviewing.

Beginning with the 2012 Visitor Profile, apparent shifts in certain results may partially be attributed to subtle changes in the sampling methodology. Enhancing the current methodology allowed for an updated mix of survey locations with new outdoor sites added to the current indoor locations at area hotels and motels. Additionally, the age range of surveyors was broadened to help achieve as representative a sample as possible. Looking ahead, continued monitoring of the survey collection processes will identify any shifts with the data and determine if they are a result of methodological changes or reflective of actual changes in the visitor characteristics.

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 2012 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 focuses on the use of the Internet to assist travel planning to Las Vegas during calendar year 2012. Statistically significant differences in the behavior, attitudes, and opinions of Internet vs. non-Internet planning are pointed out in the text of the report.

In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2012. These questions will be rotated back into the questionnaire in Calendar Year 2013 and subsequently asked every other year. These questions are noted in the text accompanying the figures in the body of this report.

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

SUMMARY OF FINDINGS

REASONS FOR VISITING

As Figure 1 shows, most visitors (84%) have visited Las Vegas in the past. However, visitors who used the Internet for travel planning (17%) were significantly more likely than those who did not (14%) to be first-time visitors.

FIGURE 1
First Visit Vs. Repeat Visit

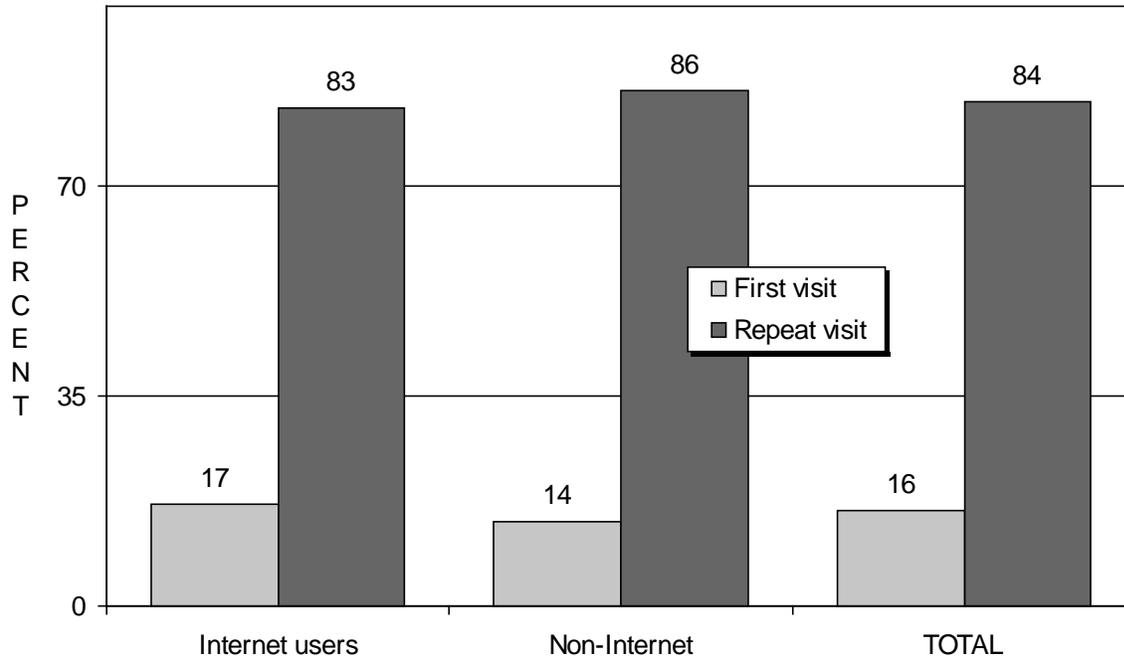
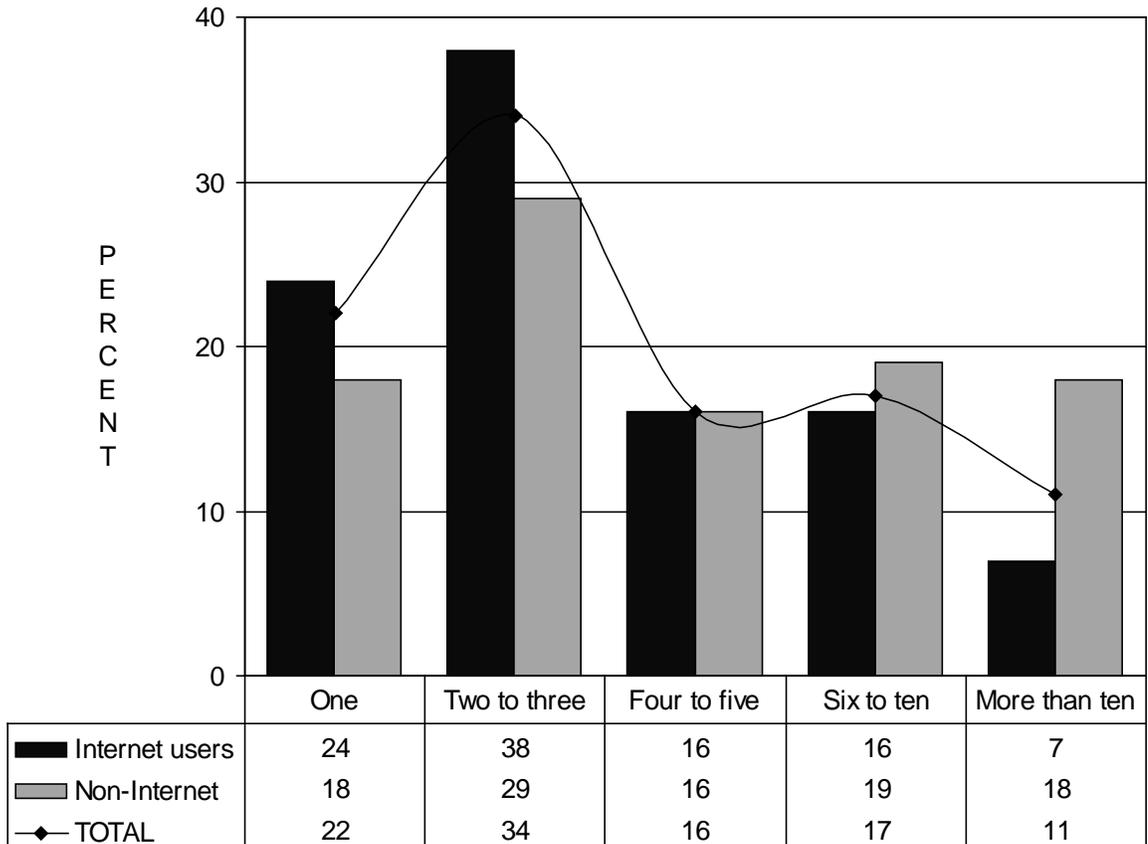


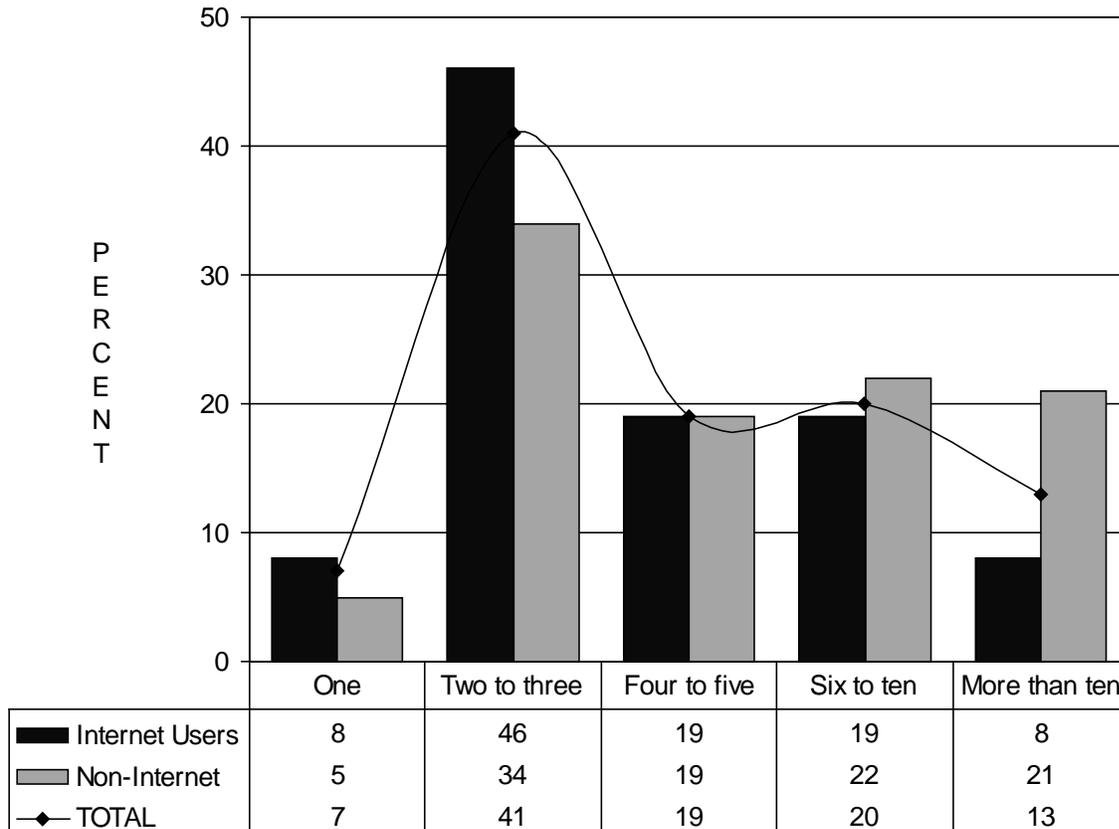
FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



(Means: Internet users=4.4, Non-Internet=7.8, TOTAL=5.8)

Among all visitors, the mean (average) number of visits to Las Vegas during the past five years was 5.8 visits (Figure 2). The average number of visits during that time was significantly lower for Internet travel planners (mean of 4.4 visits) than non-Internet users (7.8 visits).

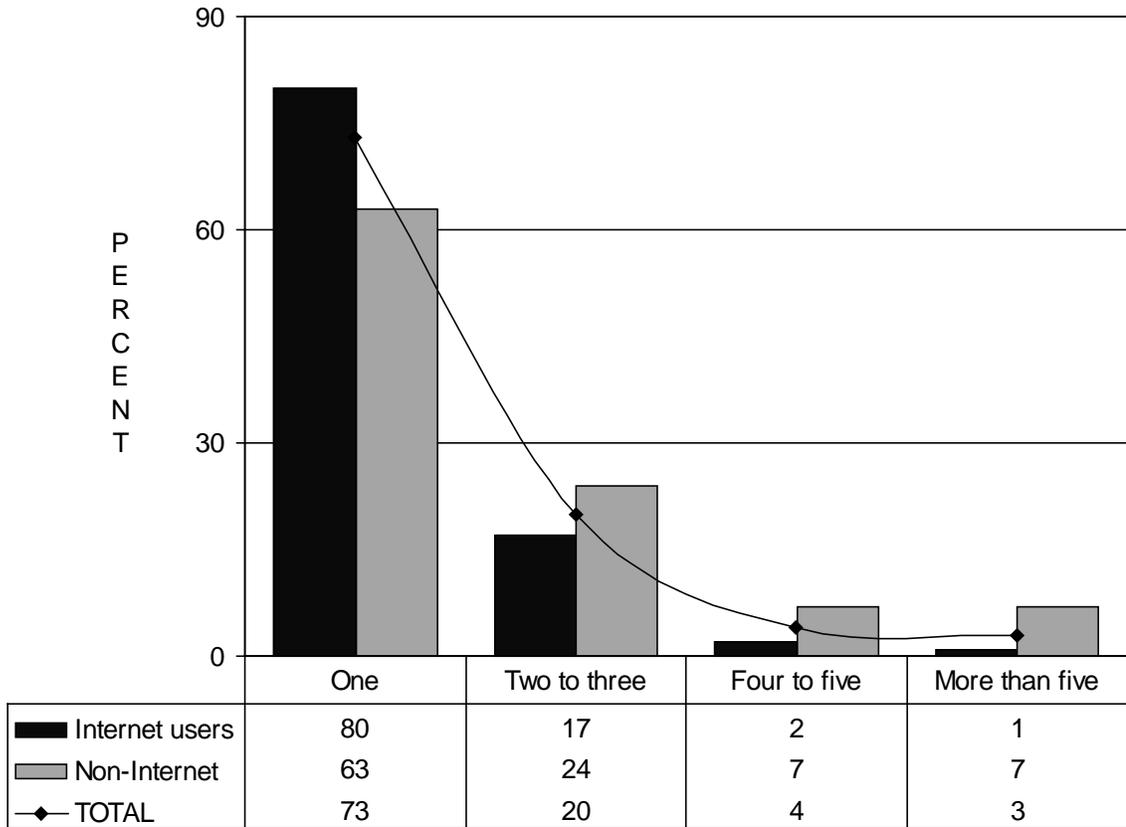
FIGURE 3
Frequency Of Visits In Past Five Years
(Among Repeat Visitors)



(Base Sizes: Internet users=1773, Non-Internet=1252, TOTAL=3026)
(Means: Internet users=5.1, Non-Internet=8.9, TOTAL=6.7)

Looking only at repeat visitors (Figure 3), the mean (average) number of visits to Las Vegas during the past five years was 6.7. Internet travel planners made significantly fewer visits to Las Vegas in the past five years (mean of 5.1 visits) than non-Internet users (8.9 visits).

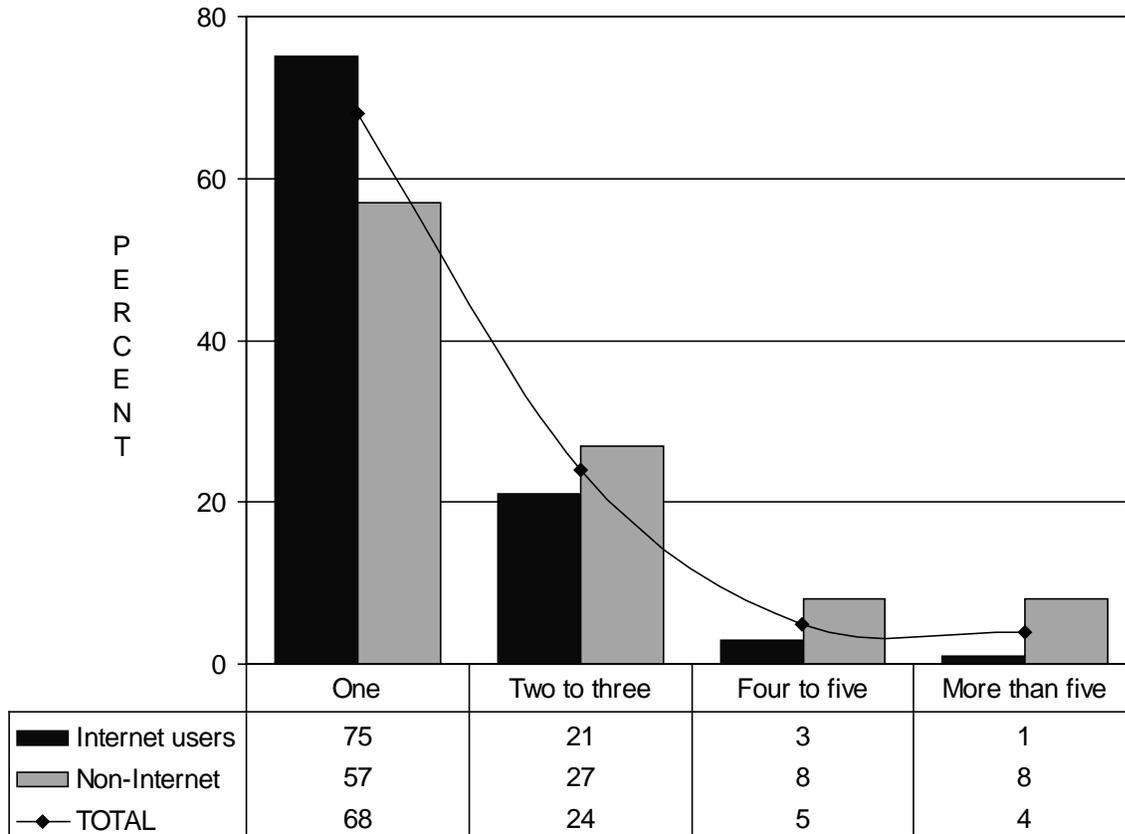
FIGURE 4
Frequency Of Visits In Past Year
(Among All Visitors)



(Means: Internet users=1.4, Non-Internet=2.0, TOTAL=1.6)

Among all visitors, the average number of visits in the past year was 1.6 (Figure 4). On average, Internet travel planners (1.4 visits) visited less frequently during the past year than non-Internet users (2.0 visits).

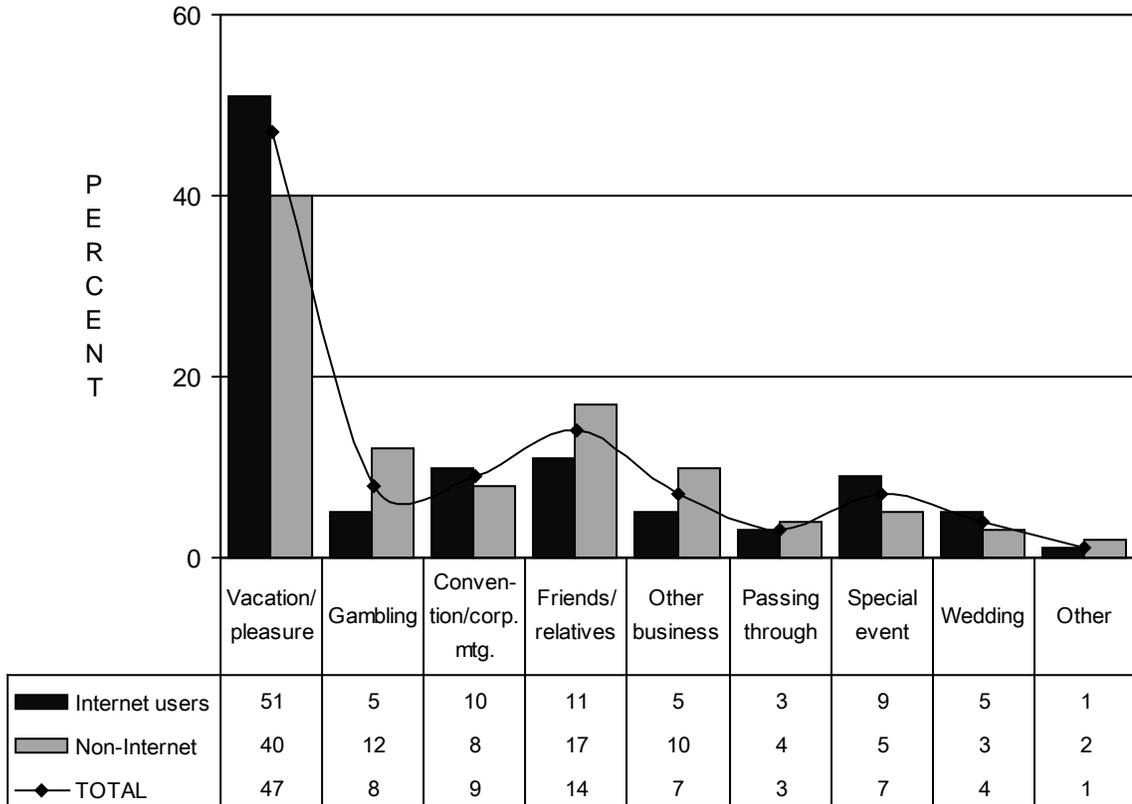
FIGURE 5
Frequency Of Visits In Past Year
(Among Repeat Visitors)



(Base Sizes: Internet users=1773, Non-Internet=1252, TOTAL=3026)
(Means: Internet users=1.4, Non-Internet=2.2, TOTAL=1.7)

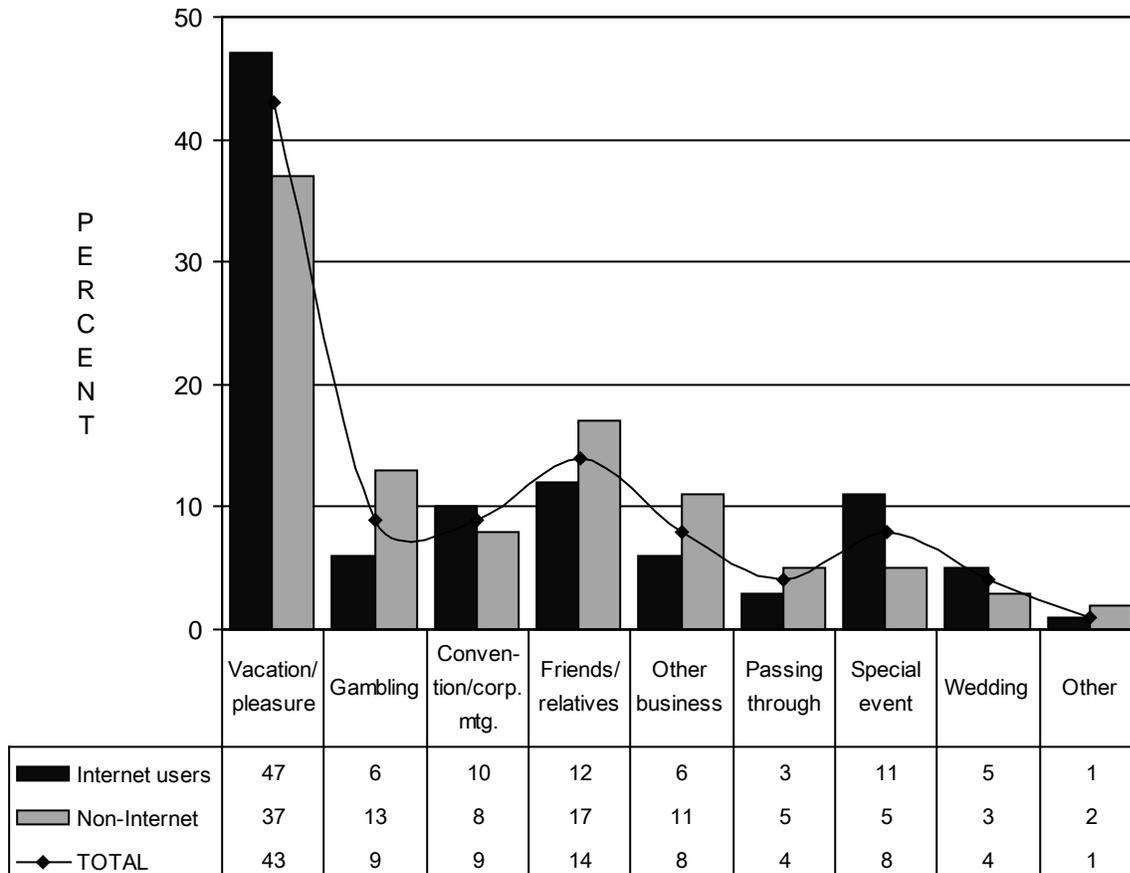
Among those who had been to Las Vegas before, the average number of visits in the past year was 1.7 (Figure 5). Again, Internet travel planners (mean of 1.4 visits) visited Las Vegas less frequently in the past year than visitors who did not use the Internet for travel planning (2.2 visits).

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



Looking at the purpose of their *current visit* among all visitors (Figure 6), Internet travel planners were significantly more likely than non-Internet users to say they were visiting Las Vegas primarily for vacation or pleasure (51% vs. 40%). Internet travel planners were also more likely than non-Internet users to be visiting Las Vegas to attend a special event (9% vs. 5%) or a wedding (5% vs. 3%). Non-Internet users were more likely than Internet travel planners to be visiting Las Vegas primarily to gamble (12% vs. 5%), to visit friends and relatives (17% vs. 11%), or for business purposes other than a convention or corporate meeting (10% vs. 5%).

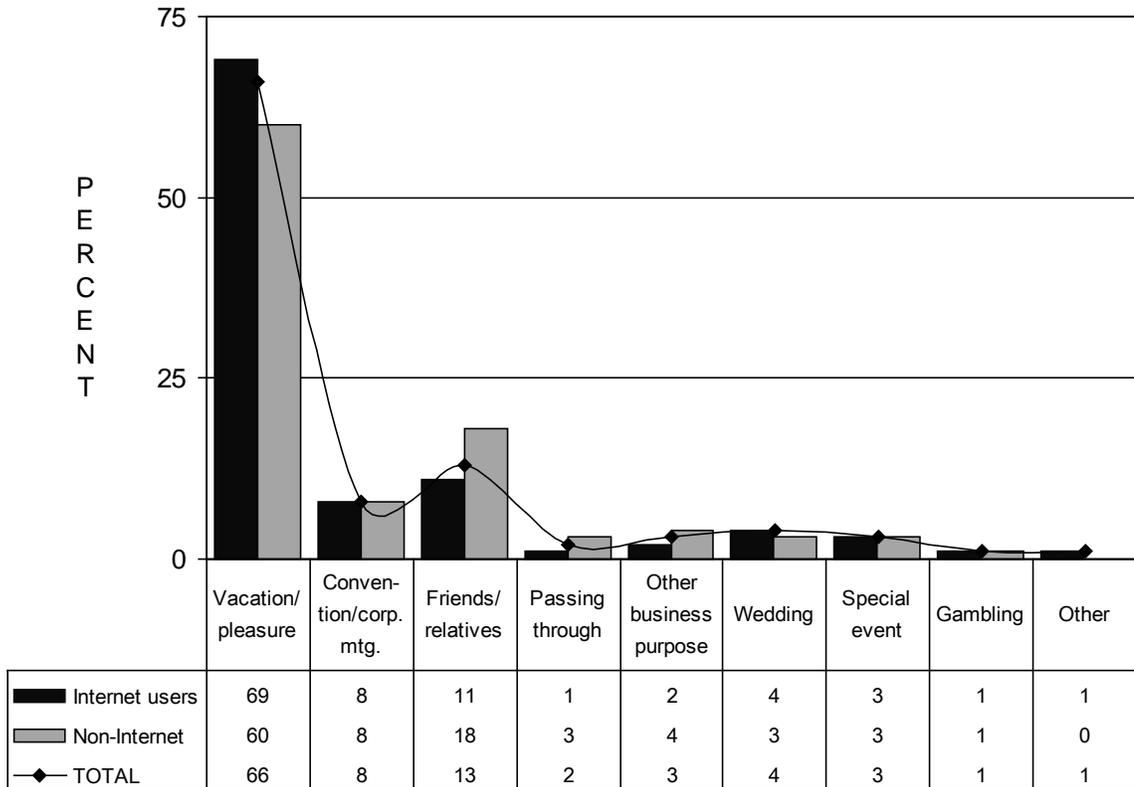
FIGURE 7
Primary Purpose Of Current Visit
(Among Repeat Visitors)



(Base Sizes: Internet users=1773, Non-Internet=1252, TOTAL=3026)

Looking at the primary purpose among repeat visitors for their *current visit* (Figure 7), Internet travel planners were significantly more likely than non-Internet users to have visited Las Vegas primarily for vacation or pleasure (47% vs. 37%). Internet travel planners were also more likely than non-Internet users to be visiting Las Vegas to attend a convention or corporate meeting (10% vs. 8%), to attend a special event (11% vs. 5%), or a wedding (5% vs. 3%). Non-Internet users were more likely than Internet travel planners to be visiting Las Vegas primarily to gamble (13% vs. 6%), to visit friends or relatives (17% vs. 12%), or for business purposes other than a convention or corporate meeting (11% vs. 6%).

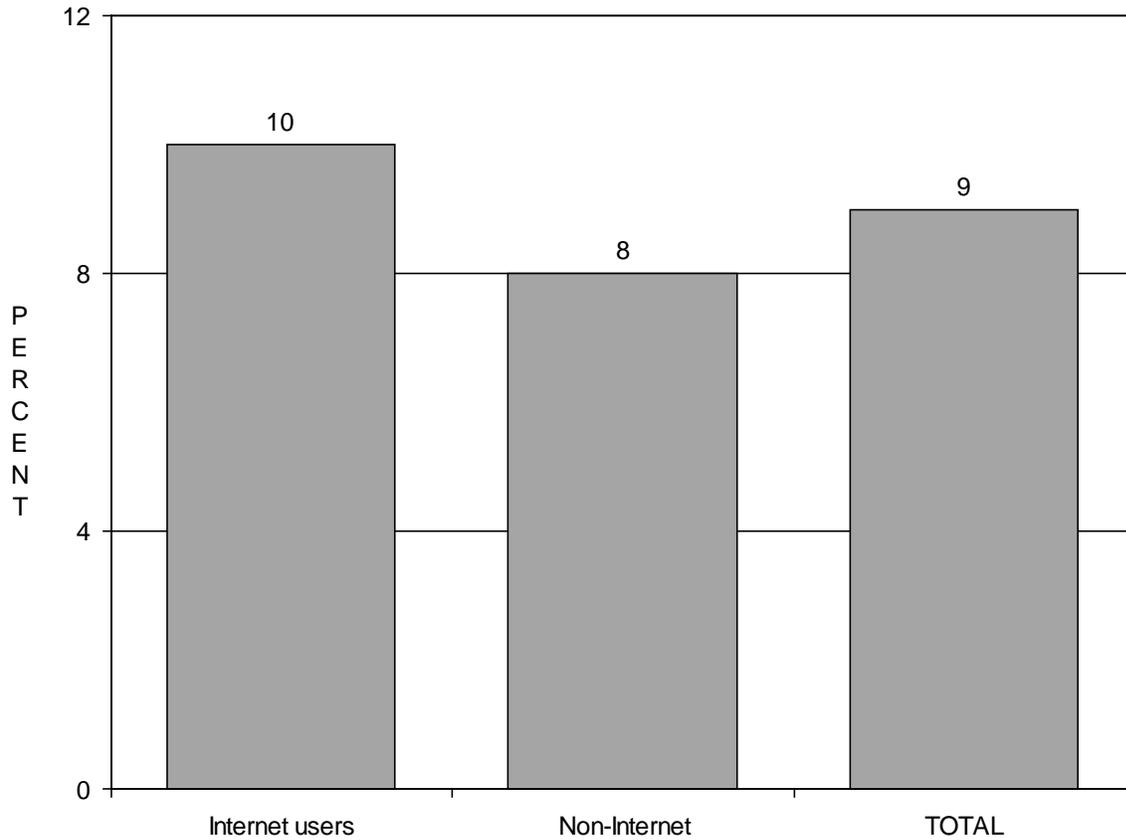
FIGURE 8
Primary Purpose Of Current Visit
(Among First-Time Visitors)



(Base Sizes: Internet users=373, Non-Internet=201, TOTAL=576)

We also looked at the purpose of the current visit among those who were making their first trip to Las Vegas (Figure 8). Two-thirds (66%) of all first-time visitors said they were visiting Las Vegas primarily for vacation or pleasure. There were no significant differences between Internet travel planners and non-Internet users on this measure.

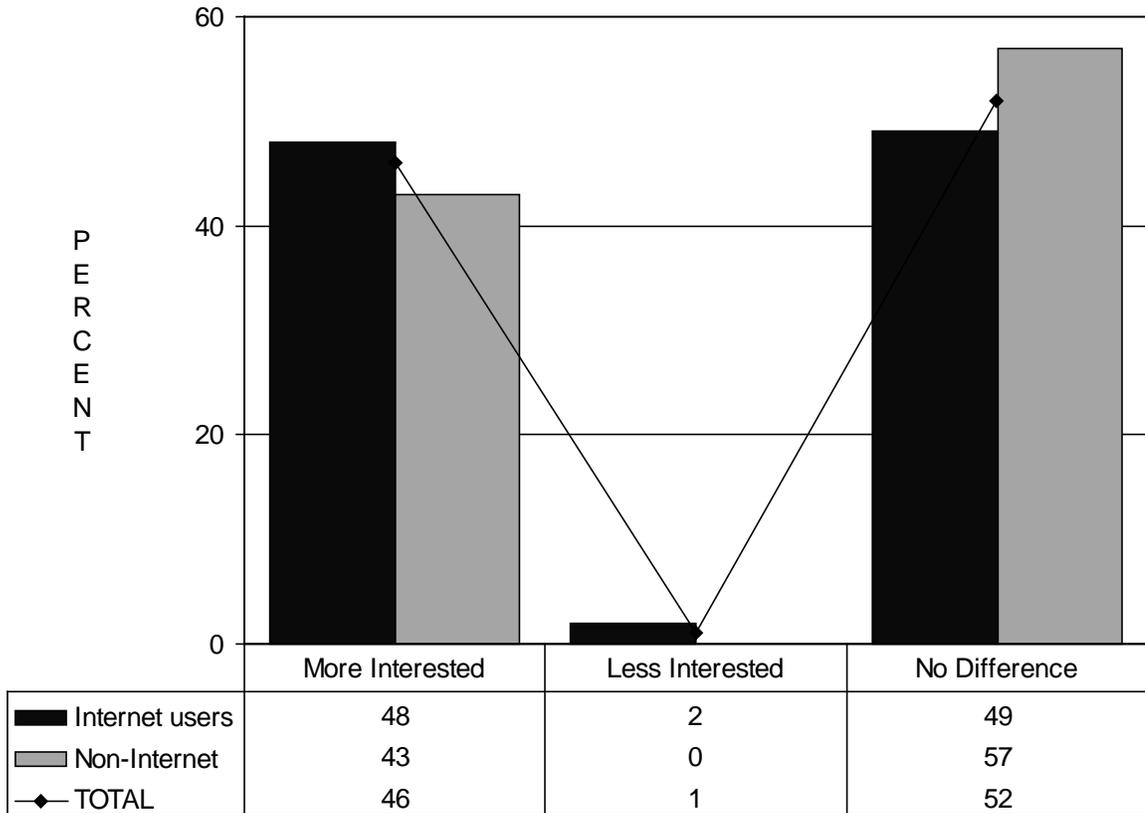
FIGURE 9
Conventions/Trade Shows/Corporate Meetings*



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

Respondents were asked if they participated in or attended a convention or trade show while they were in Las Vegas, and 9% said they had (Figure 9). There was no significant difference between Internet and non-Internet users on this measure.

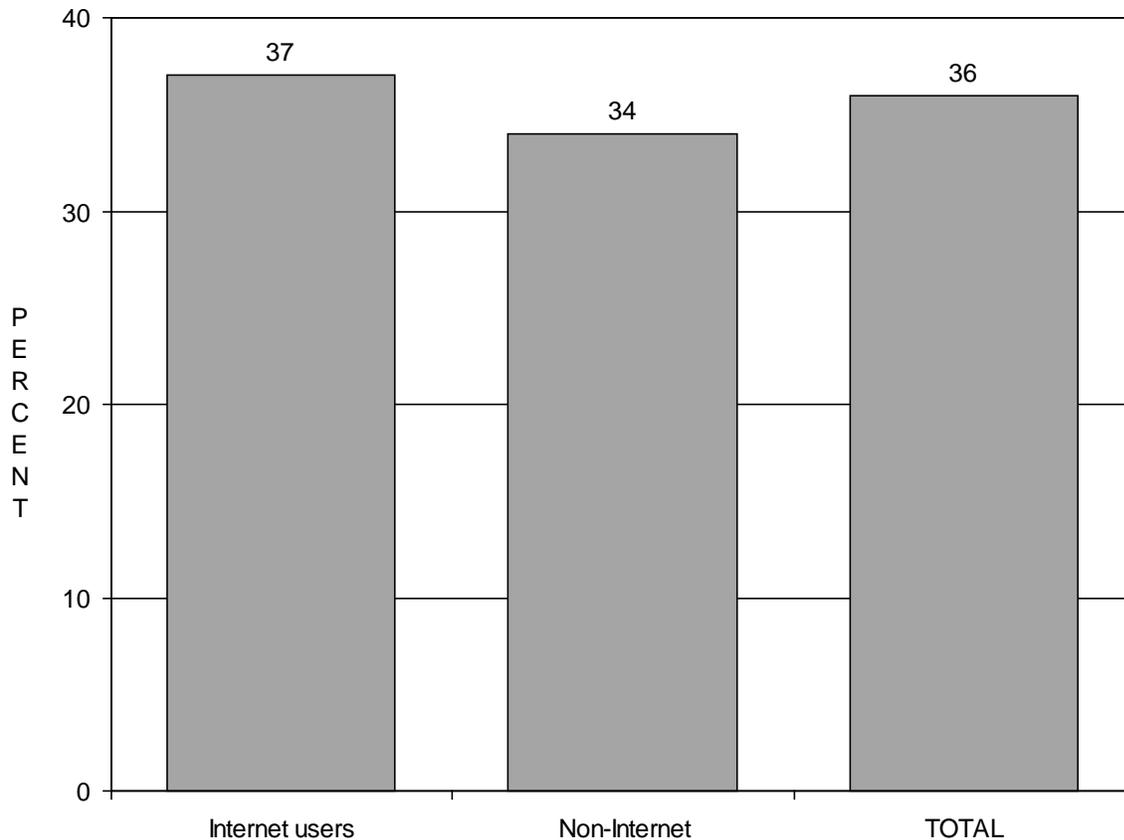
FIGURE 10
Interest In Attending Conventions, Trade Shows, Or
Corporate Meetings In Las Vegas
(Among Visitors Who Attended A Convention,
Trade Show, Or Corporate Meeting)



(Base Sizes: Internet users=210, Non-Internet=115, TOTAL=326)

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 10). Forty-six percent (46%) said having the convention in Las Vegas made them more interested in attending, while 52% said it made no difference, and 1% said it made them less interested in attending. There were no significant differences between Internet and non-Internet users on this measure.

FIGURE 11
Whether Brought Someone Else Who Did Not Attend Conventions,
Trade Shows, Or Corporate Meetings In Las Vegas
(Among Visitors Who Attended A Convention,
Trade Show, Or Corporate Meeting)*



(Base Sizes: Internet users=210, Non-Internet=115, TOTAL=326)

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

Convention visitors were asked if they had brought with them a spouse, family member, or friend who was not attending or working at the convention, trade show, or corporate meeting. Thirty-six percent (36%) said they had (Figure 11). There was no significant difference between Internet and non-Internet users on this measure.

TRAVEL PLANNING

Internet travel planners tended to plan their trip to Las Vegas farther in advance than those who did not use the Internet to plan their trip. Internet travel planners were significantly more likely than non-Internet users to have planned their trip more than one month in advance (51% vs. 39%). Conversely, those who did not use the Internet to plan their trip were significantly more likely than Internet travel planners to have planned their trip to Las Vegas two weeks or less in advance (28% vs. 16%) (Figure 12).

FIGURE 12
Advance Travel Planning

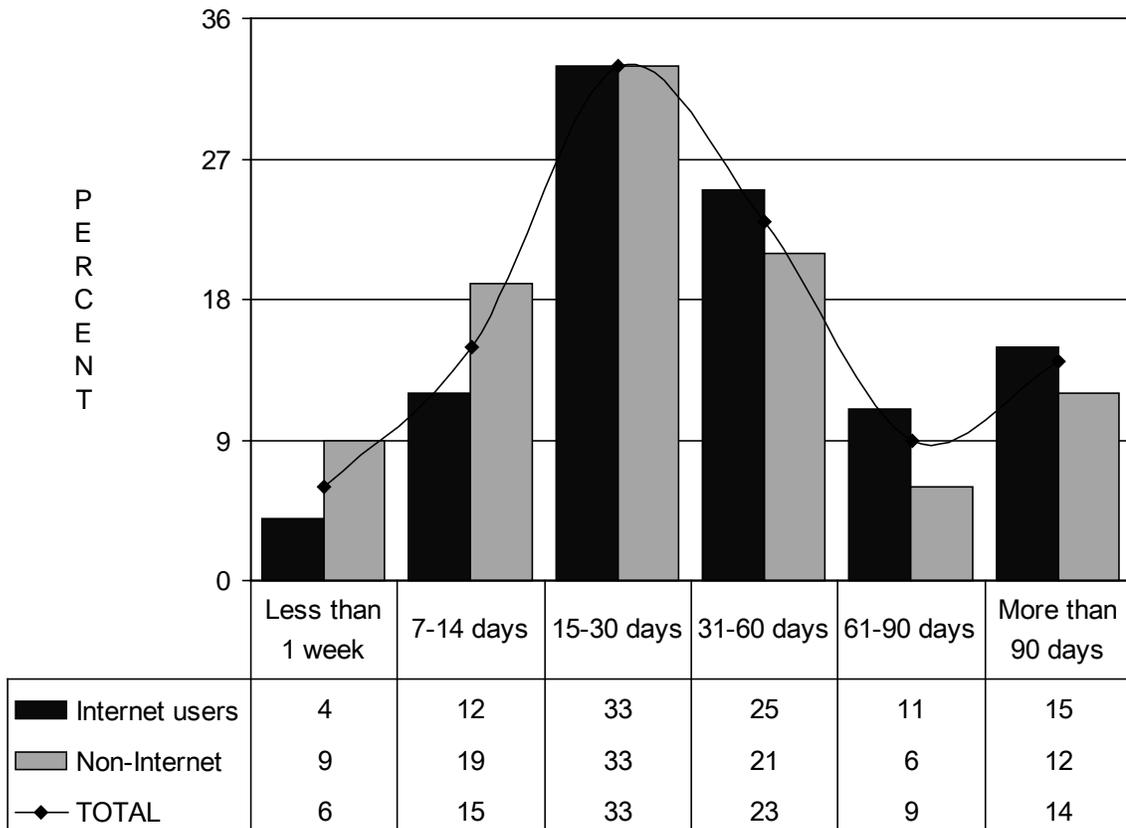
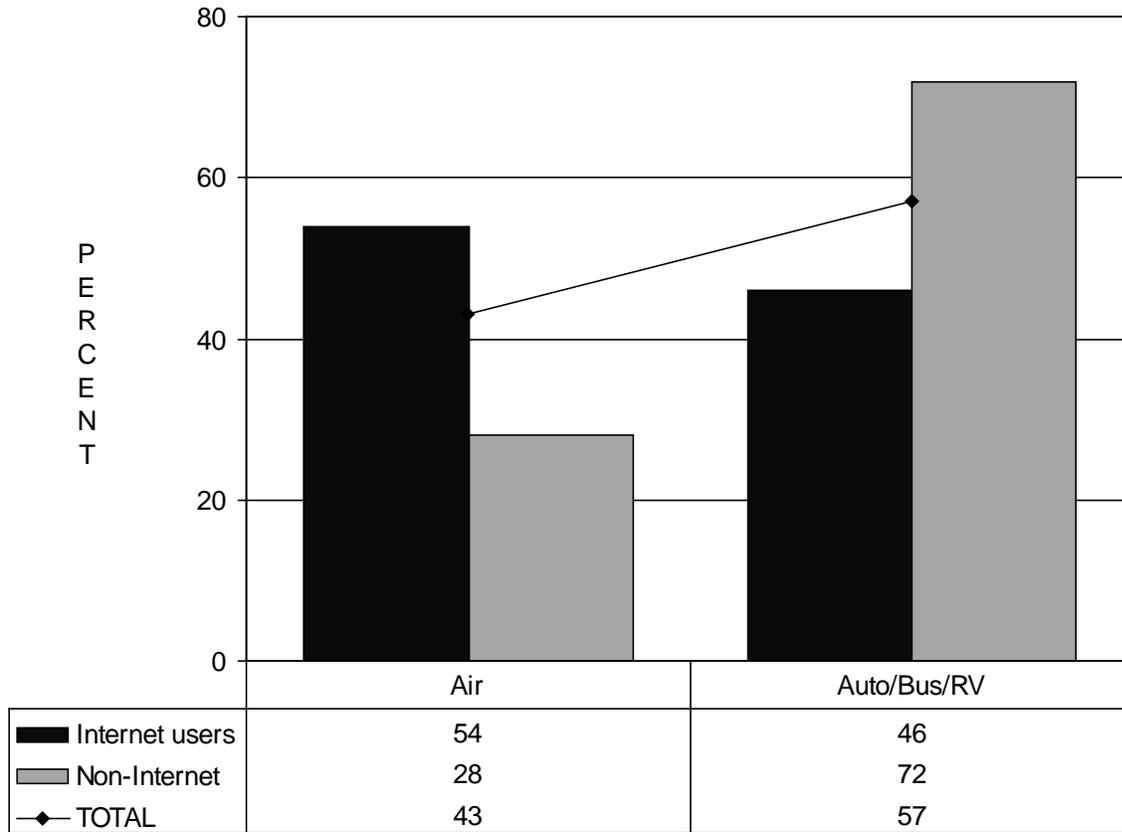
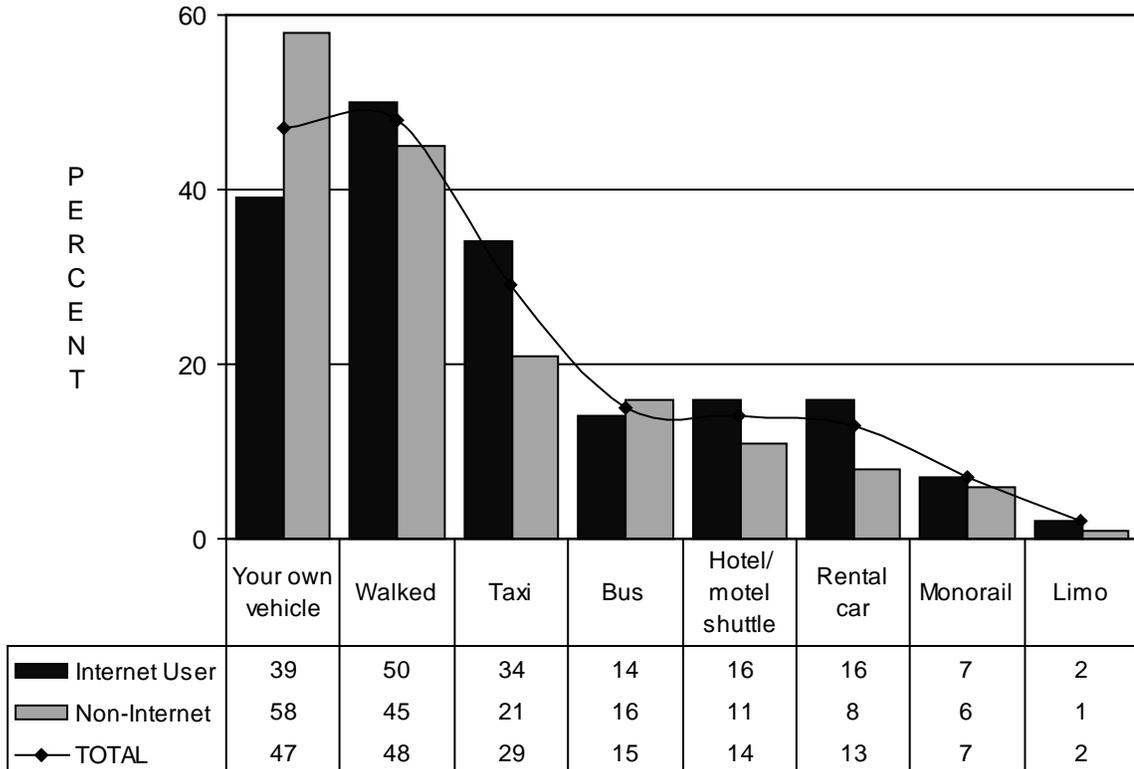


FIGURE 13
Transportation To Las Vegas



As Figure 13 shows, Internet travel planners were significantly more likely than non-Internet users to have traveled to Las Vegas by air (54% vs. 28%) and significantly less likely than non-Internet users to have traveled to Las Vegas by auto, bus, or RV (46% vs. 72%).

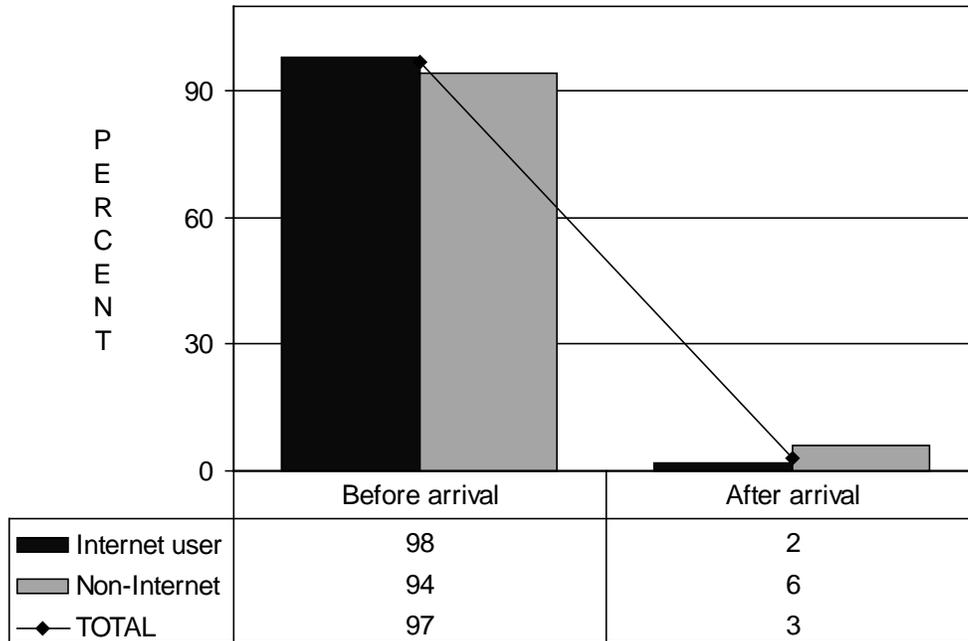
FIGURE 14
Local Transportation*



*Multiple responses permitted

Visitors were asked about the types of local transportation they had used while in Las Vegas (Figure 14). Internet travel planners were significantly more likely than non-Internet users to have used many forms of local transportation, including taxis (34% vs. 21%), hotel/motel shuttles (16% vs. 11%), and rental cars (16% vs. 8%). Internet travel planners were also significantly more likely than non-Internet users to volunteer that that they walked around Las Vegas (50% vs. 45%). Non-Internet users, however, were more likely than Internet travel planners to say they used their own vehicle for transportation while in Las Vegas (58% vs. 39%).

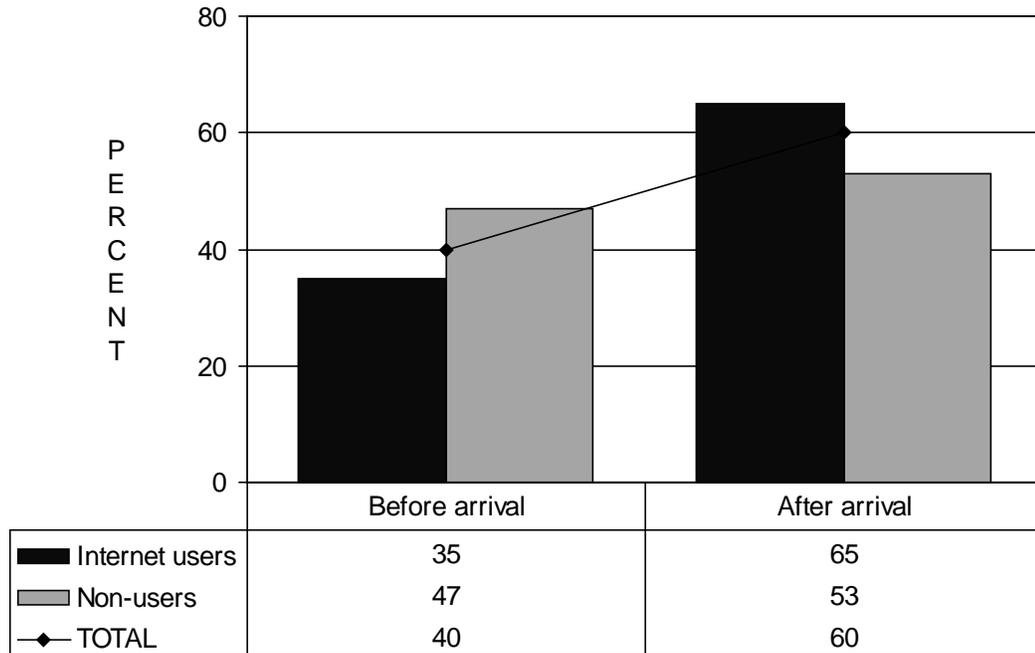
FIGURE 15
When Decided Where To Stay
(Among Those Who Stayed Overnight)



(Base Sizes: Internet users=2146, Non-Internet=1443, TOTAL=3591)

Most visitors (97%) decided where to stay before leaving home (Figure 15). Internet travel planners (98%) were significantly more likely than non-Internet users (94%) to say they decided where to stay before arrival. Non-Internet users (6%) were significantly more likely than Internet travel planners (2%) to say they decided where to stay after arrival.

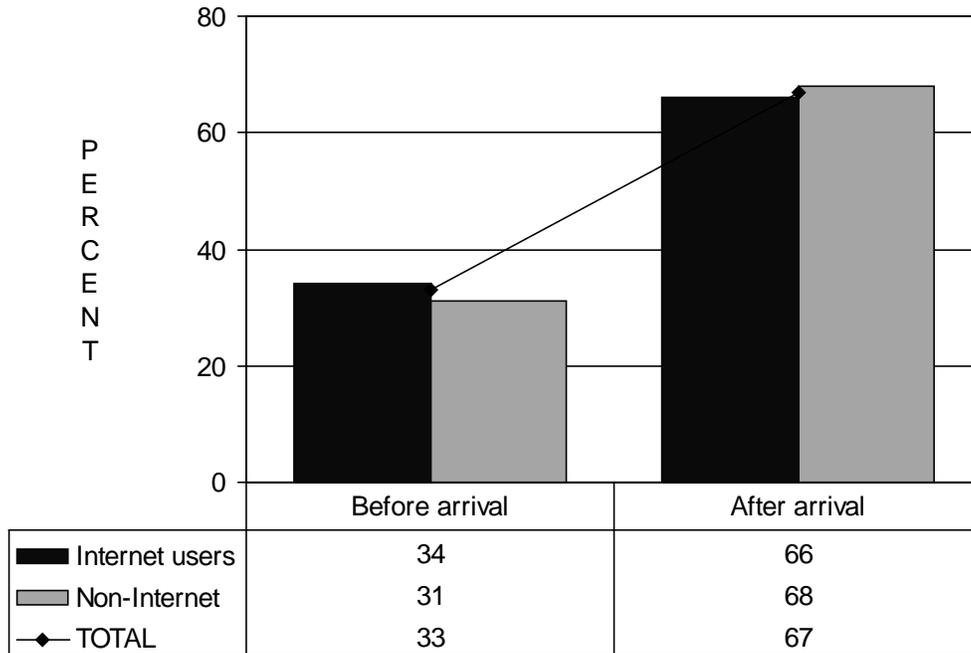
FIGURE 16
When Decided Where To Gamble
(Among Those Who Gambled)



(Base Sizes: Internet users=1495, Non-Internet=1092, TOTAL=2589)

The majority of visitors (60%) decided where to gamble after arriving in Las Vegas (Figure 16). Internet travel planners (65%) were significantly more likely than non-Internet users (53%) to say they decided where to gamble after arrival.

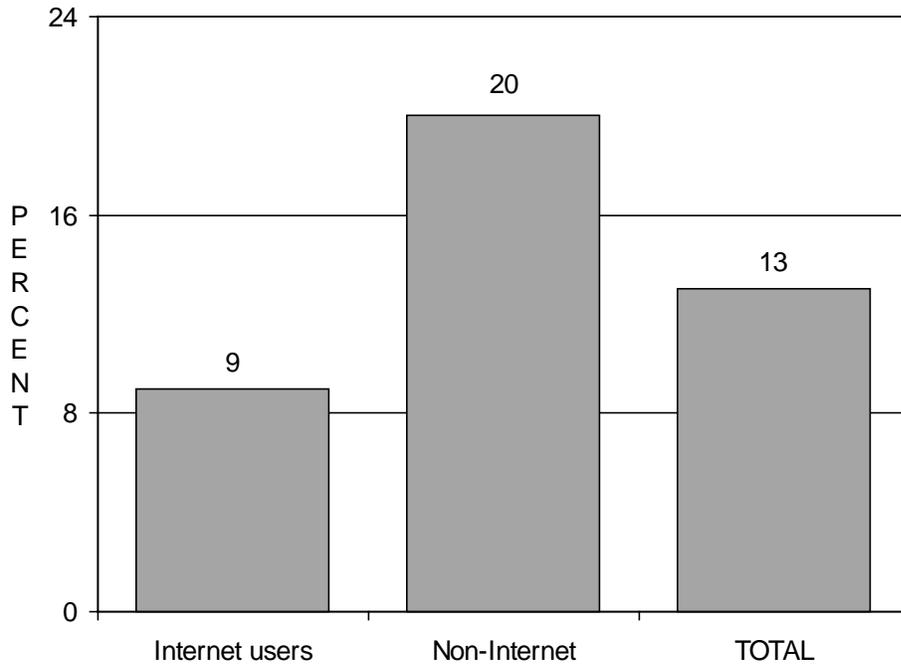
FIGURE 17
When Decided Which Shows To See
(Among Those Who Saw Shows)



(Base Sizes: Internet users=1562, Non-Internet=786, TOTAL=2349)

While most visitors (67%) decided which shows to see after arrival, one in three (33%) decided before leaving home. There was no significant difference between Internet and non-Internet users on this measure (Figure 17).

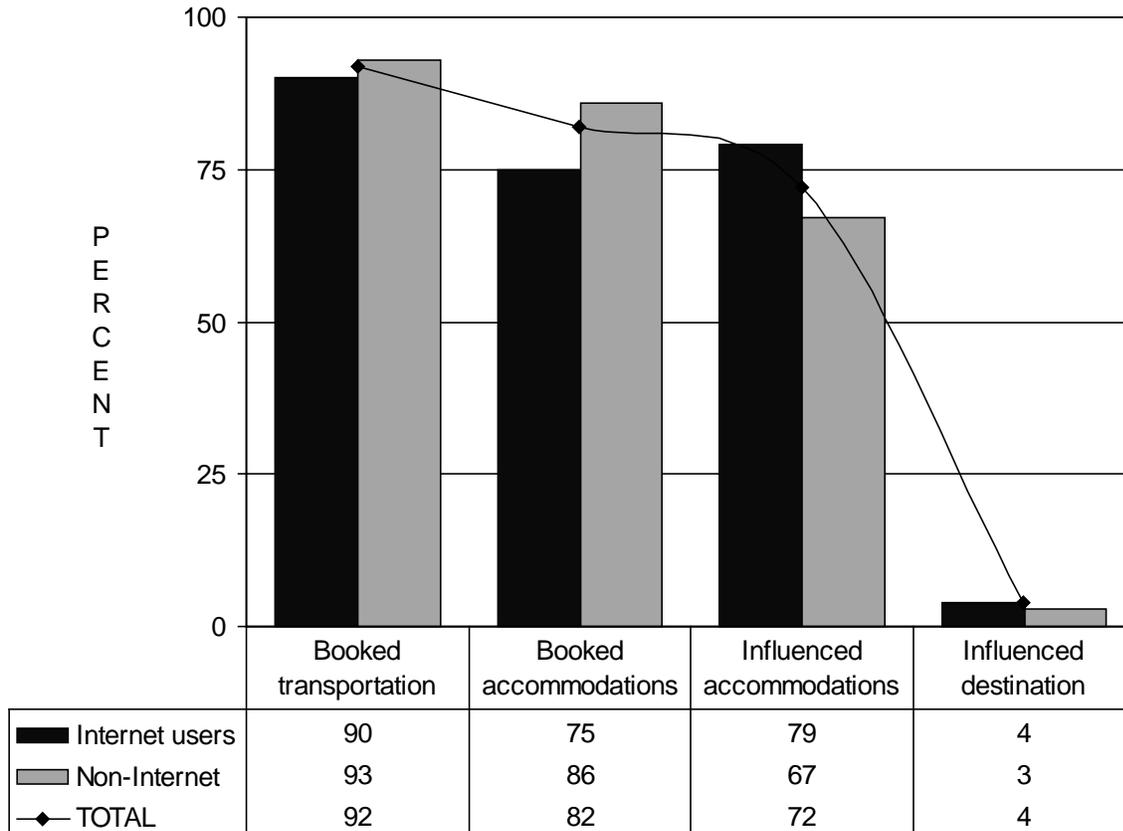
FIGURE 18
Travel Agent Assistance*



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

As Figure 18 shows, Internet travel planners were significantly less likely to have used a travel agent for their current trip to Las Vegas than non-Internet travel users (9% vs. 20%).

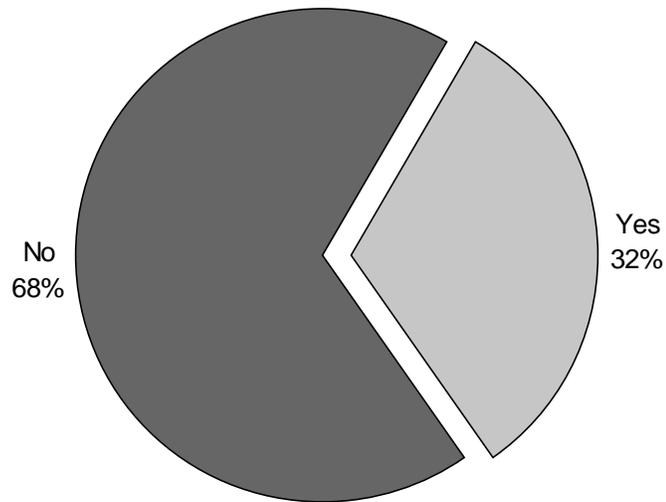
FIGURE 19
Travel Agent Influence And Use*
(Among Those Who Used A Travel Agent)



*Multiple responses permitted
(Base Sizes: Internet users=187, Non-Internet=297, TOTAL=484)

Among those who used a travel agent for their most recent trip to Las Vegas (Figure 19), most visitors said the travel agent helped them book their transportation (92%) or accommodations (82%). About seven in ten (72%) said the travel agent influenced their choice of accommodations in Las Vegas. Internet travel planners were significantly more likely than non-Internet users to say a travel agent influenced their choice of accommodations (79% vs. 67%), while non-Internet users were more likely than Internet travel planners to say the travel agent booked their accommodations (86% vs. 75%).

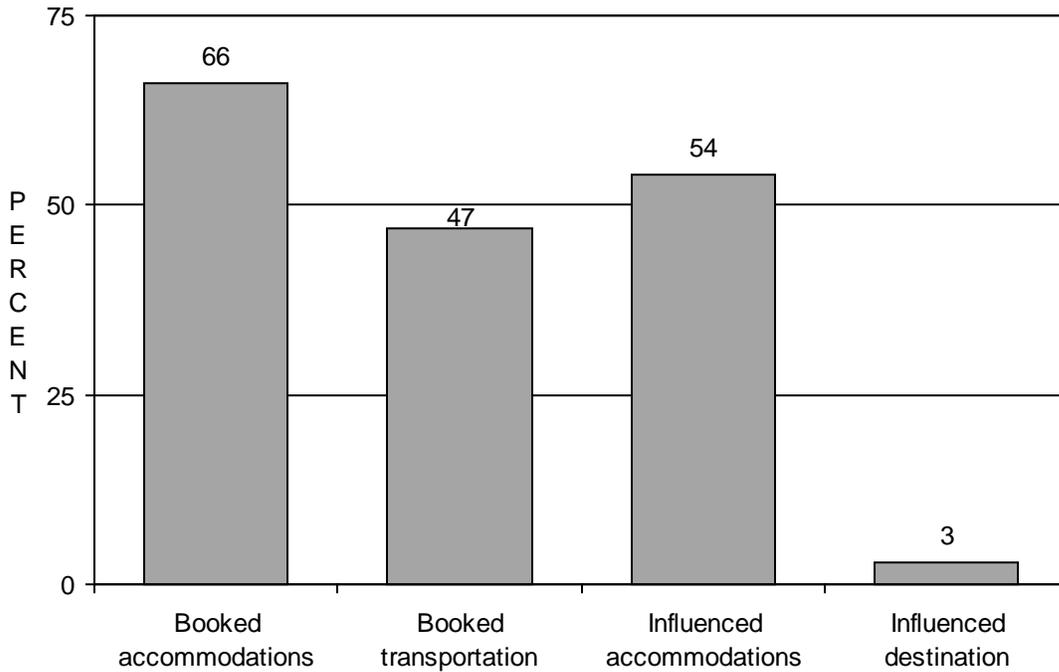
FIGURE 20
Whether Used Social Media Web Sites To Plan Trip



(Base Size: Internet users=2146)

Visitors were asked if they used any social media web sites, such as Facebook, Twitter, or others, to help in planning their trip to Las Vegas. About one in three (32%) Internet travel planners said they had (Figure 20).

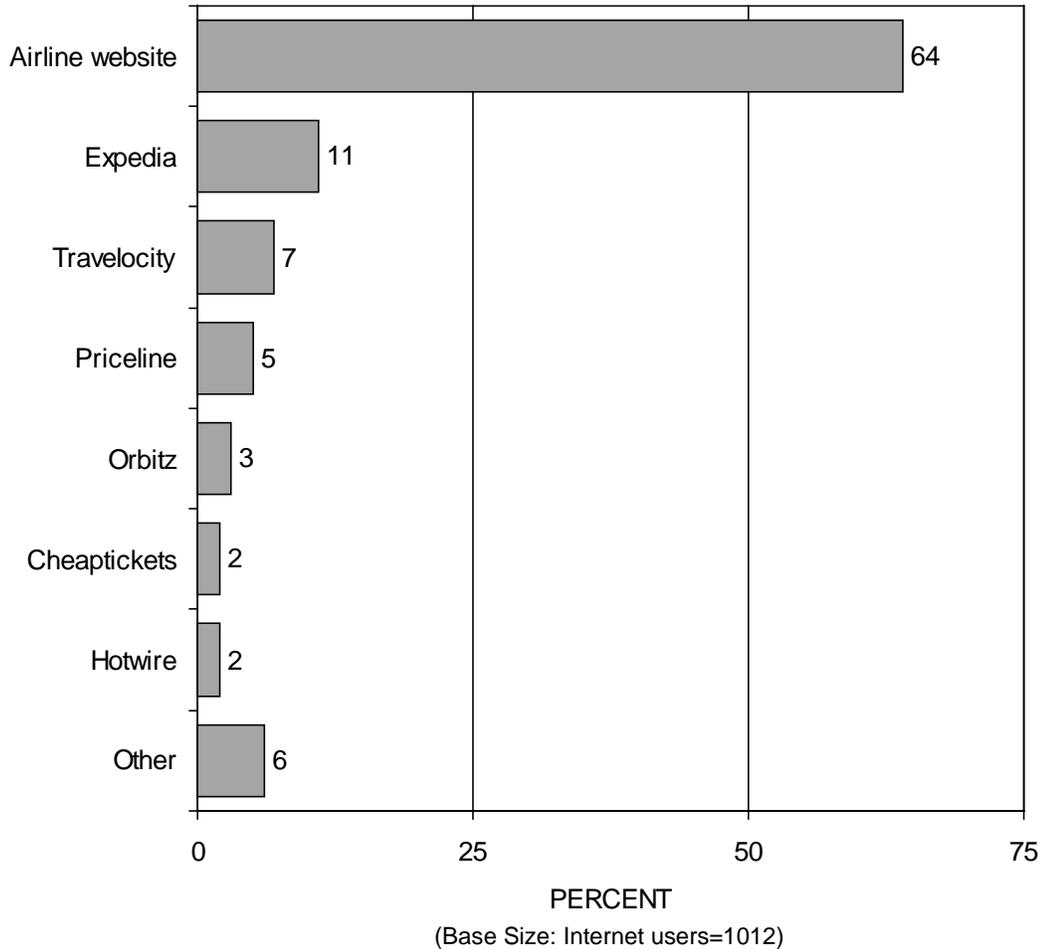
FIGURE 21
Internet Influence And Use*
(Among Internet Travel Planners)



*Only "yes" responses are reported in this figure.
(Base Size: Internet users=2146)

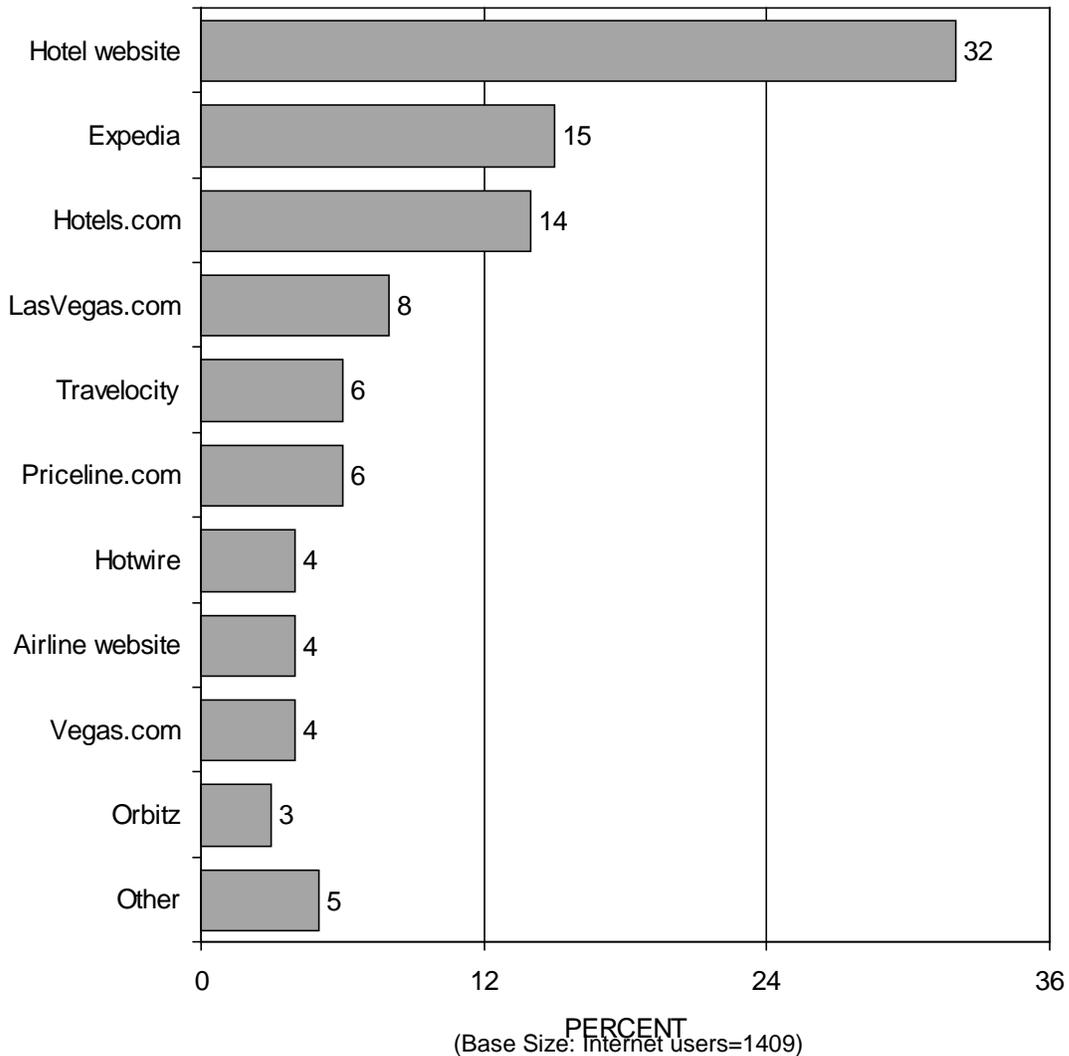
Two-thirds (66%) of Internet travel planners said they used the Internet to book their accommodations in Las Vegas on their current trip, while almost one-half (47%) said they booked their transportation to Las Vegas online (Figure 21). More than one-half (54%) of online travel planners also said the Internet influenced their choice of accommodations.

FIGURE 22
Website Used To Book Transportation
(Among Internet Travel Planners Who Booked Online)



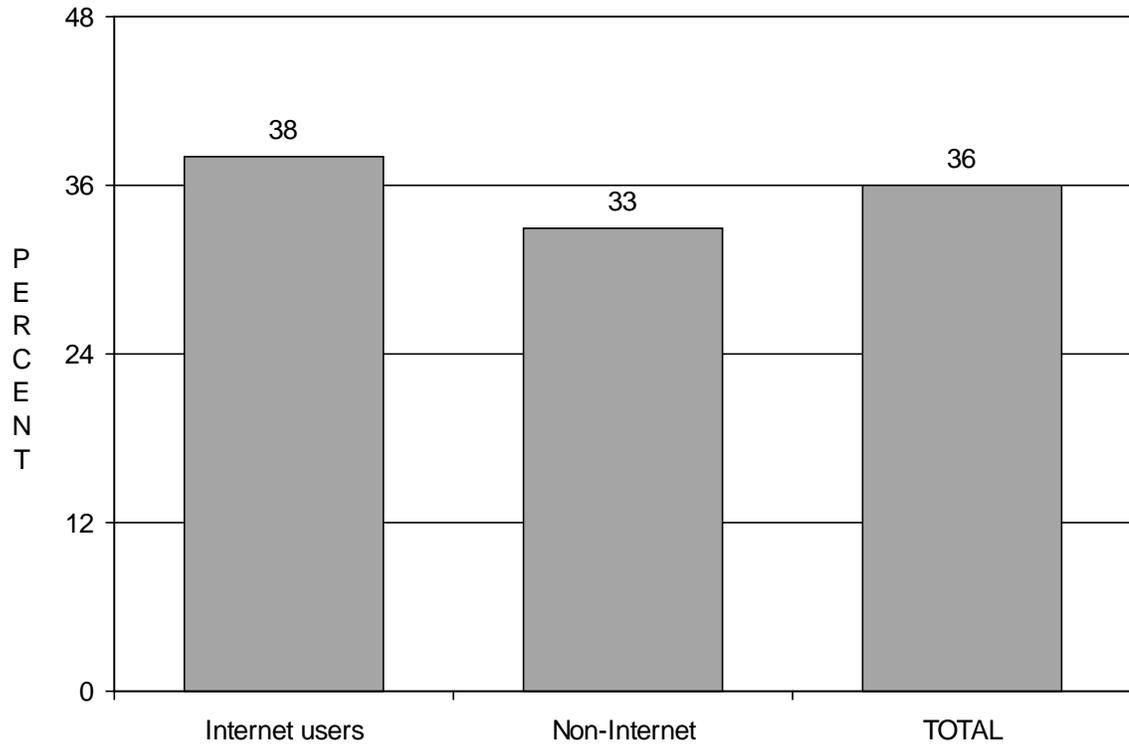
Internet travel planners who had booked their transportation to Las Vegas online were also asked to name the website they used to do so (Figure 22). Almost two-thirds (64%) mentioned airline websites, followed by Expedia (11%), Travelocity (7%), and Priceline (5%). A smaller number of visitors used other websites.

FIGURE 23
Website Used To Book Accommodations
(Among Internet Travel Planners Who Booked Online)



Internet travel planners who booked their accommodations in Las Vegas online were asked to name the website they had used to do so (Figure 23). Hotel websites (32%) were mentioned the most often, followed by Expedia (15%), Hotels.com (14%), LasVegas.com (8%), Travelocity (6%), and Priceline (6%). Smaller proportions of visitors used several other websites.

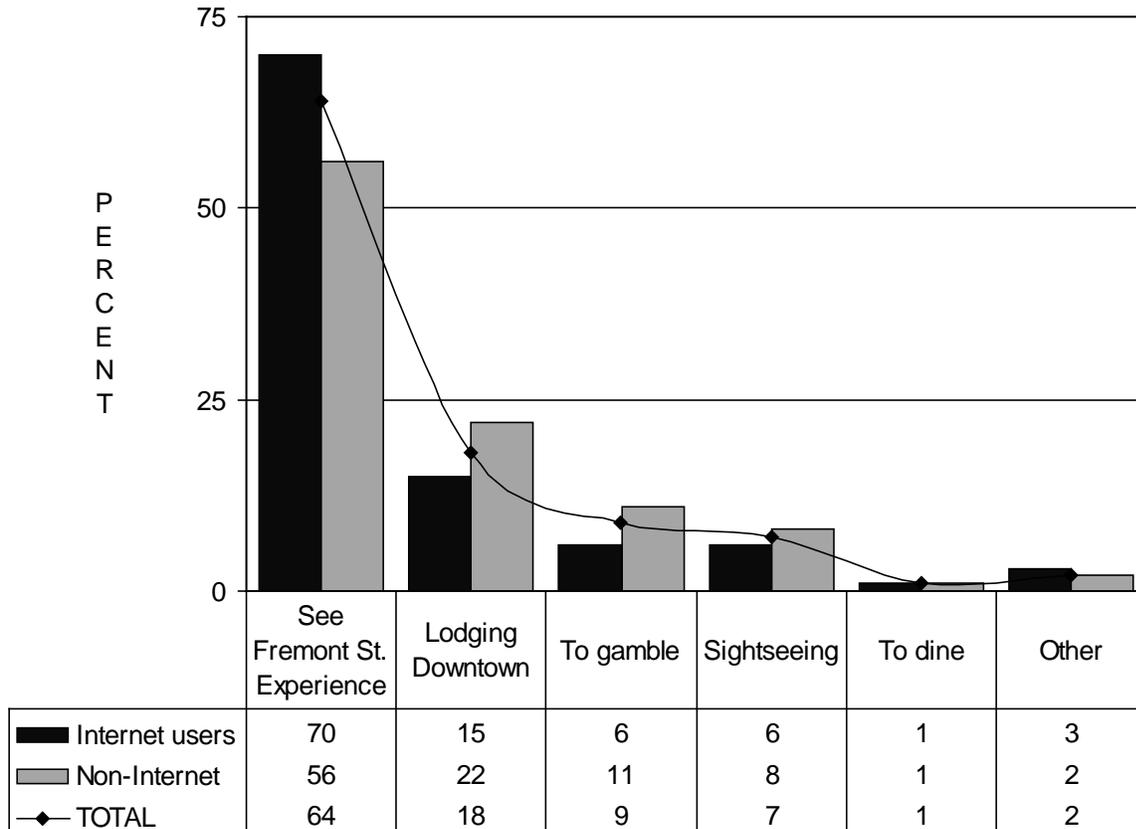
FIGURE 24
Whether Visited Downtown Las Vegas*



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

Thirty-six percent (36%) of all visitors said they had visited Downtown Las Vegas on their current trip. Internet travel planners (38%) were significantly more likely than non-Internet users (33%) to have visited Downtown (Figure 24).

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

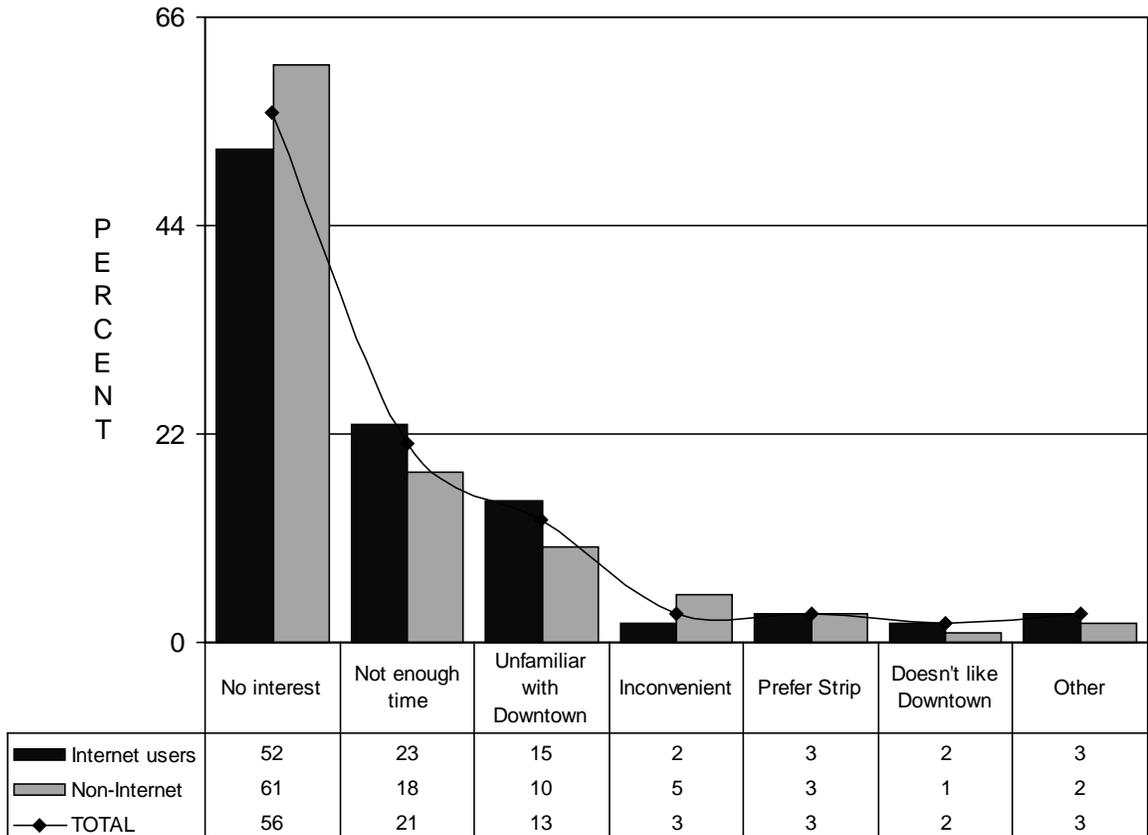


(Base Sizes: Internet Travel Users=686, Non-Internet=519, TOTAL=1206)

Visitors were asked for the primary reason why they had gone to the Downtown area (Figure 25). More than six in ten (64%) said they had gone Downtown to see the Fremont Street Experience, with Internet travel planners (70%) significantly more likely than non-Internet users (56%) to give this response. Non-Internet users were more likely than Internet travel planners to say they were lodging Downtown (22% vs. 15%) or that they visited Downtown primarily to gamble (11% vs. 6%).

* These results are from 2011. This question is asked every other year and was not asked in 2012.

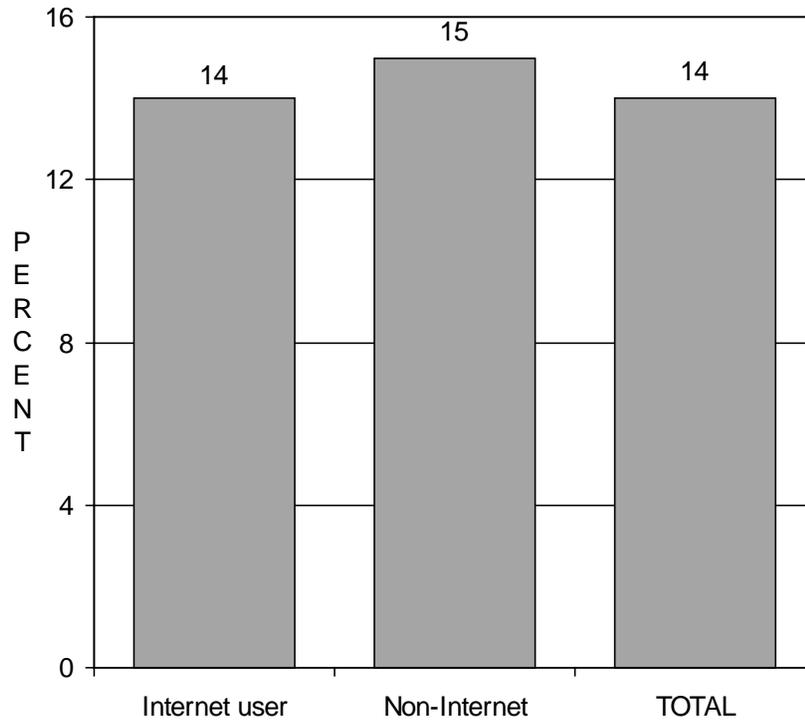
FIGURE 26
Main Reason For Not Visiting Downtown Las Vegas
(Among Those Who Did Not Visit Downtown)



(Base Sizes: Internet users=1333, Non-Internet=975, TOTAL=2310)

Visitors who did not visit Downtown were asked to volunteer why (Figure 26). Non-Internet users were more likely than Internet travel planners to say they were not interested in Downtown (61% vs. 52%) or that Downtown was inconvenient and out of the way (5% vs. 2%). Internet travel planners were significantly more likely than non-Internet users to say they did not have enough time (23% vs. 18%) or that they were unfamiliar with Downtown (15% vs. 10%).

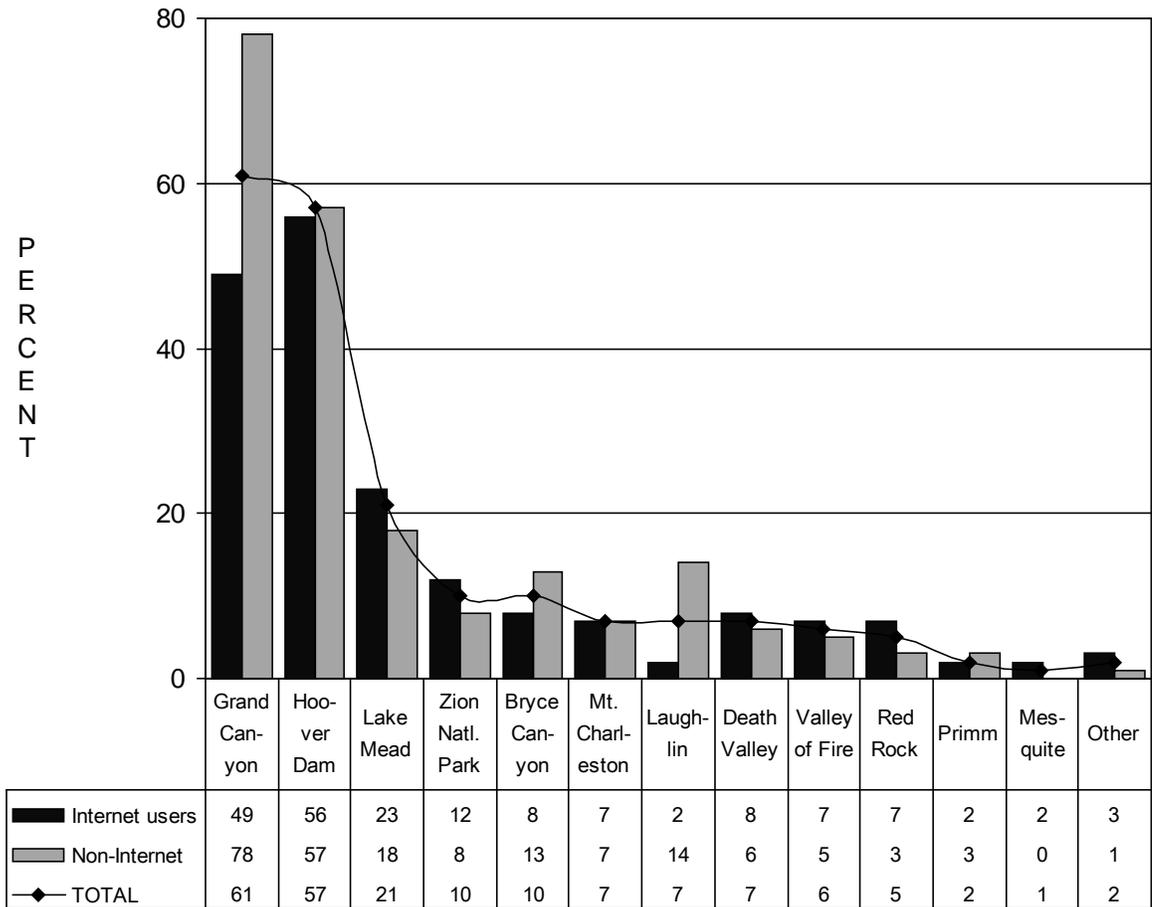
FIGURE 27
Visits To Nearby Places*



Visitors were asked if they visited any nearby places either before or after their trip to Las Vegas (Figure 27). Overall, 14% of visitors said they had. There was no significant difference between Internet and non-Internet users on this measure.

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

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



(Base Sizes: Internet Travel Users=295, Non-Internet=213, TOTAL=509)

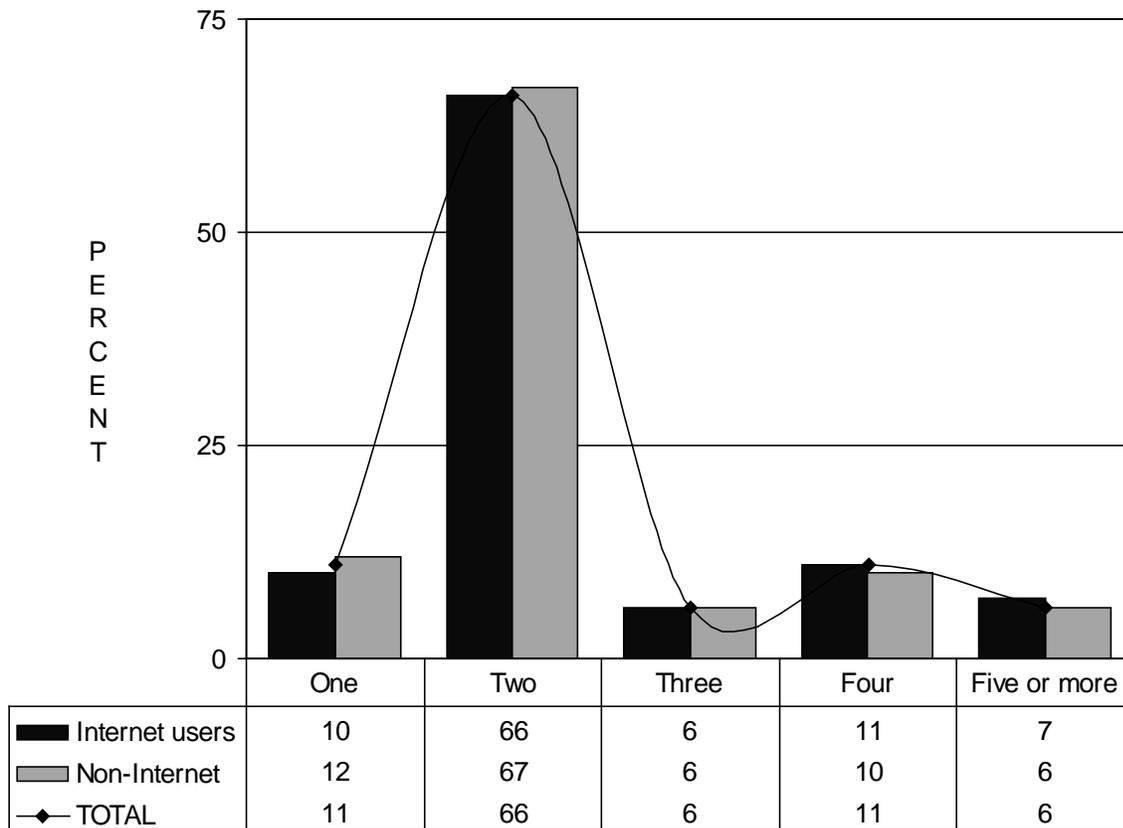
Visitors were asked what other nearby destinations they had visited or planned to visit (Figure 28). The most common destinations mentioned were the Grand Canyon (61%) and Hoover Dam (57%). Non-Internet users were significantly more likely than Internet travel planners to visit the Grand Canyon (78% vs. 49%) or Laughlin (14% vs. 2%).

* Multiple responses were permitted.

TRIP CHARACTERISTICS AND EXPENDITURES

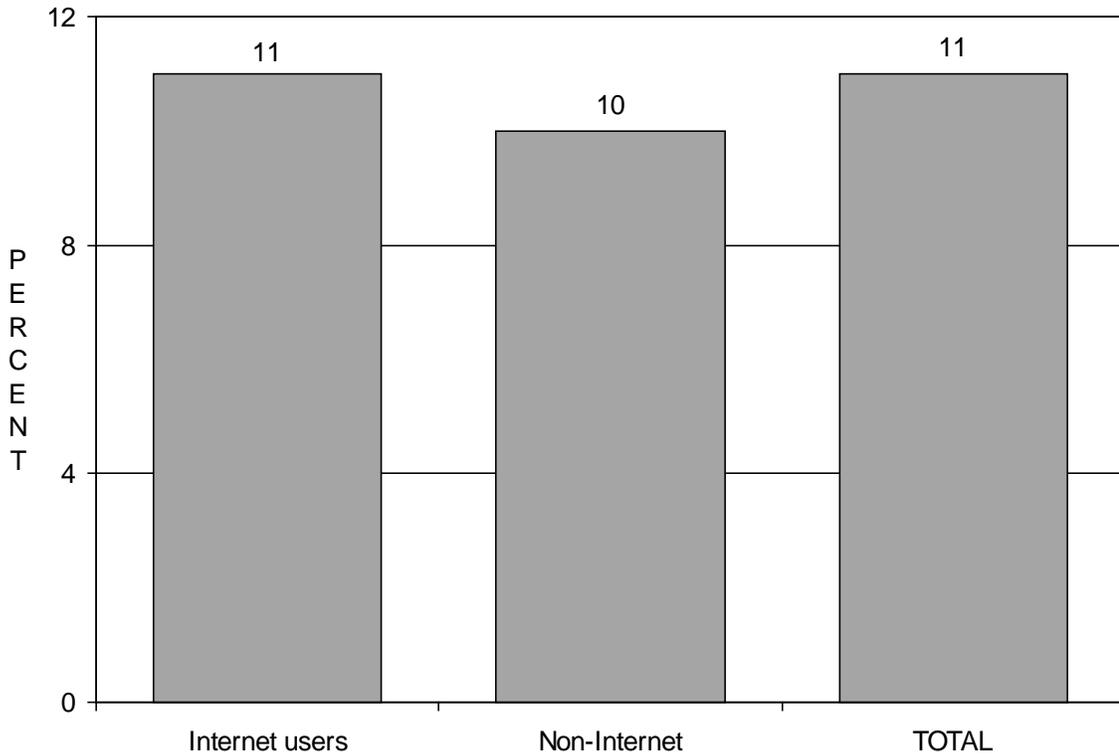
The average number of adults in immediate party for all visitors in 2012 was 2.4. Internet travel planners (2.5) had a larger average party size than non-Internet users (2.4) (Figure 29).

FIGURE 29
Adults In Immediate Party



(Means: Internet users=2.5, Non-Internet=2.4, TOTAL=2.4)

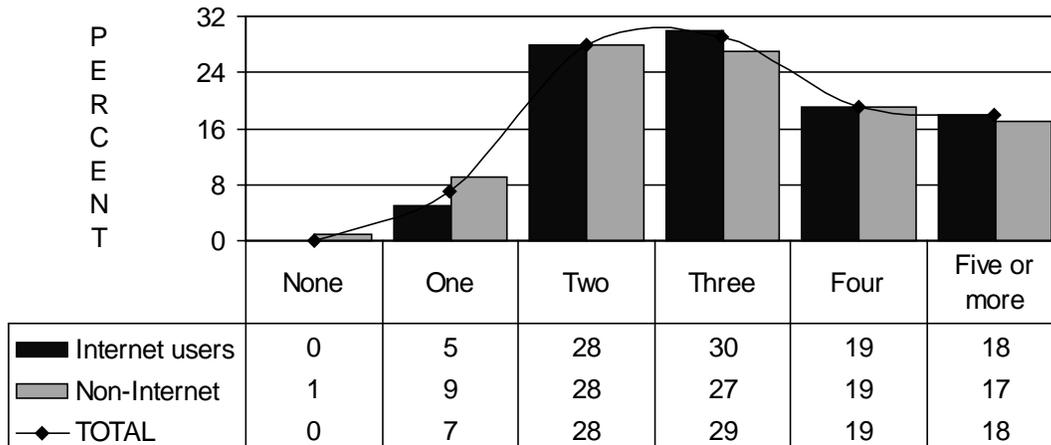
FIGURE 30
Whether Has Persons In Immediate Party Under Age 21*
(Among All Visitors)



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

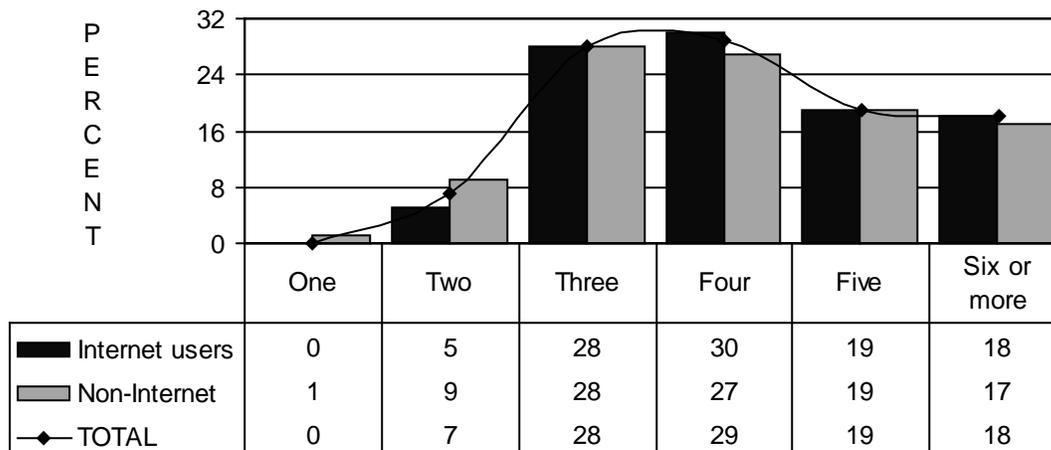
Eleven percent (11%) of Las Vegas visitors were traveling with people under the age of 21 (Figure 30). There was no significant difference between Internet and non-Internet users on this measure.

FIGURE 31
Nights Stayed



(Means: Internet users=3.3, Non-Internet=3.2, TOTAL=3.3)

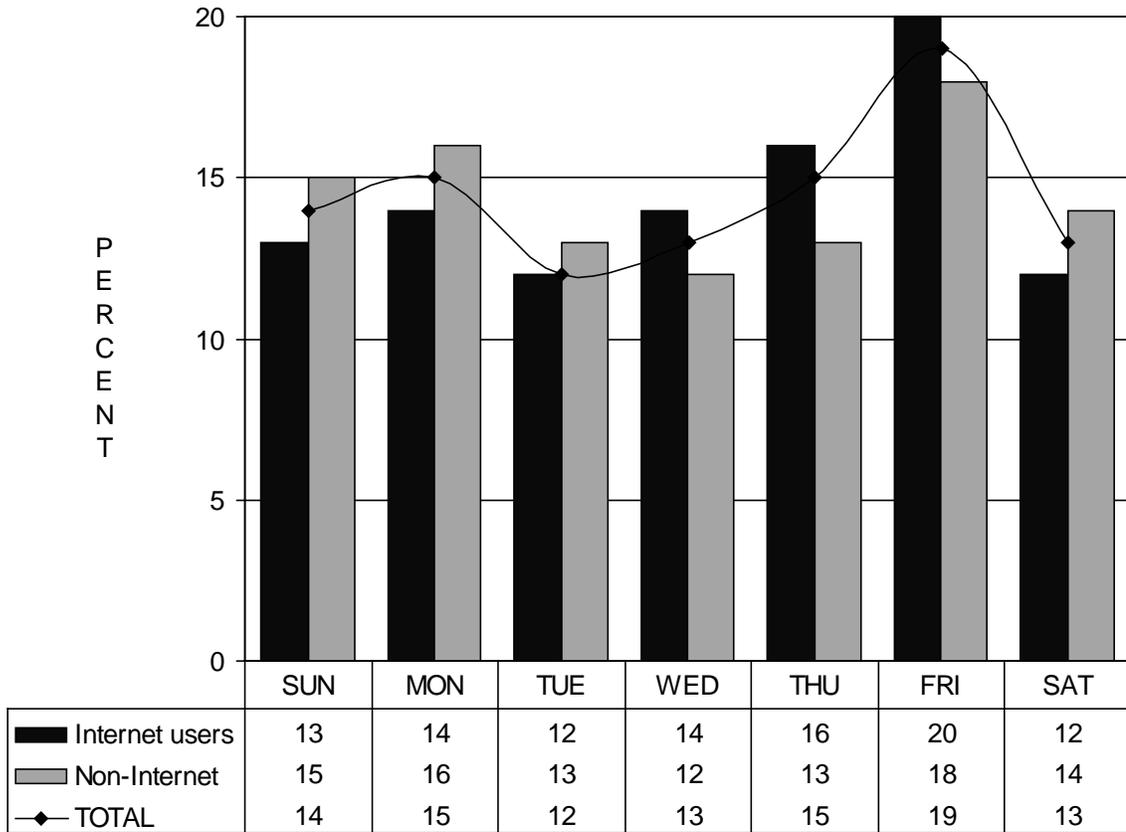
FIGURE 32
Days Stayed



(Means: Internet users=4.3, Non-Internet=4.2, TOTAL=4.3)

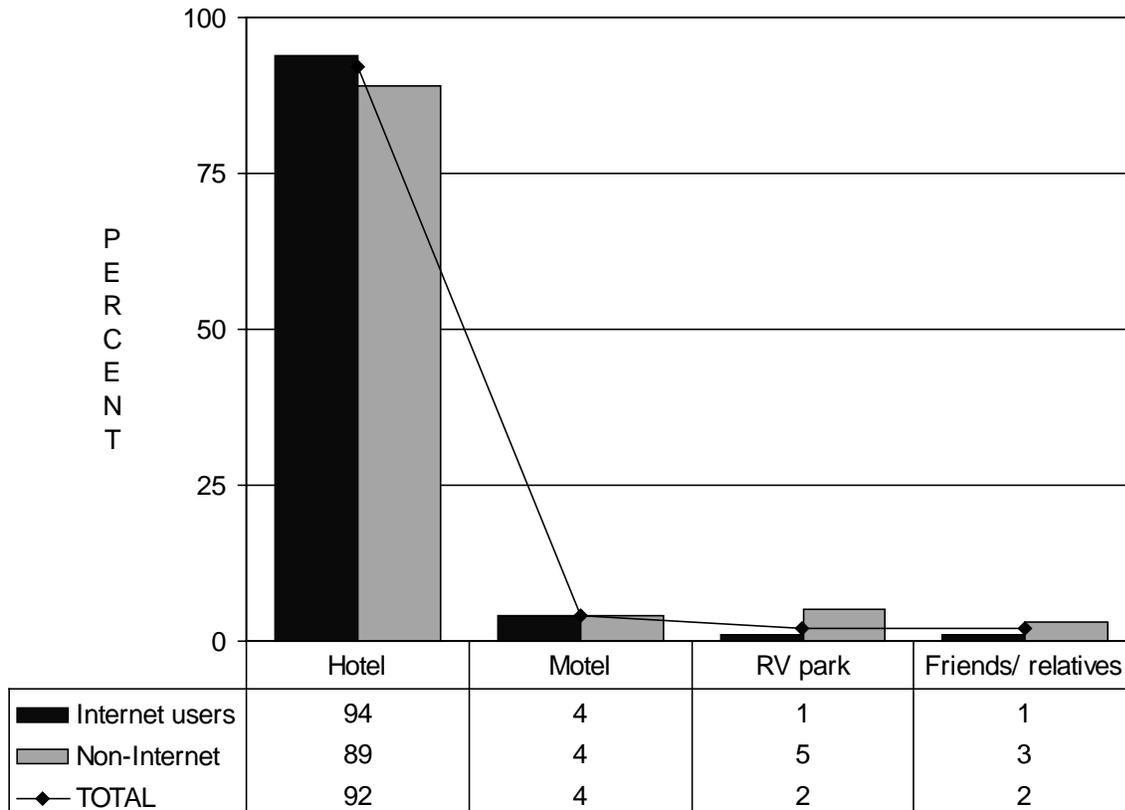
In terms of length of stay in Las Vegas, visitors stayed an average of 3.3 nights and 4.3 days (Figures 31 and 32). There was no significant difference between Internet and non-Internet users on this measure.

FIGURE 33
Day Of Arrival



All respondents were asked on what day of the week they arrived in Las Vegas (Figure 33). Visitors were most likely to arrive on a Friday (19%). Internet travel planners were significantly more likely than non-Internet users to arrive on a Thursday (16% vs. 13%).

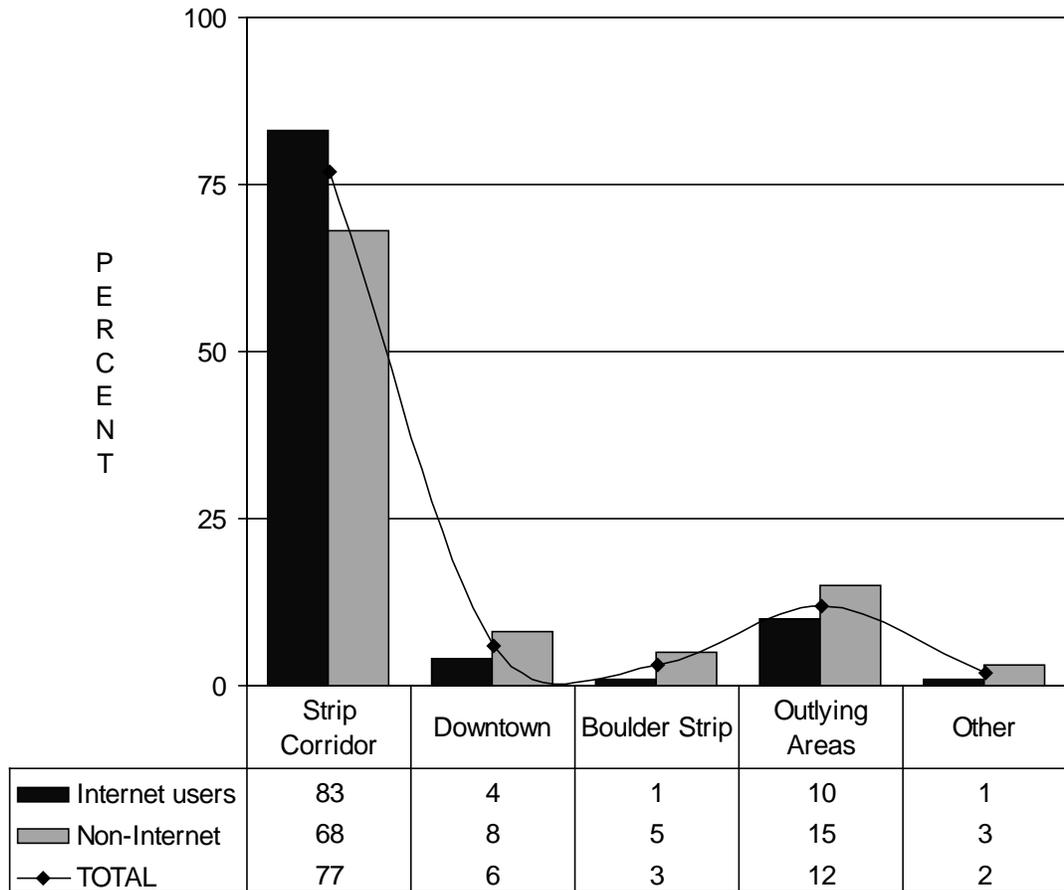
FIGURE 34
Type Of Lodging
(Among Those Who Stayed Overnight)



(Base Sizes: Internet users=2146, Non-Internet=1443, TOTAL=3591)

Among those who stayed overnight in Las Vegas, the vast majority (92%) stayed in a hotel. Internet travel planners (94%) were significantly more likely than non-Internet users (89%) to have stayed in a hotel (Figure 34). Non-Internet users were more likely than Internet travel planners to have stayed in an RV park (5% vs. 1%), or with friends or relatives (3% vs. 1%).

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

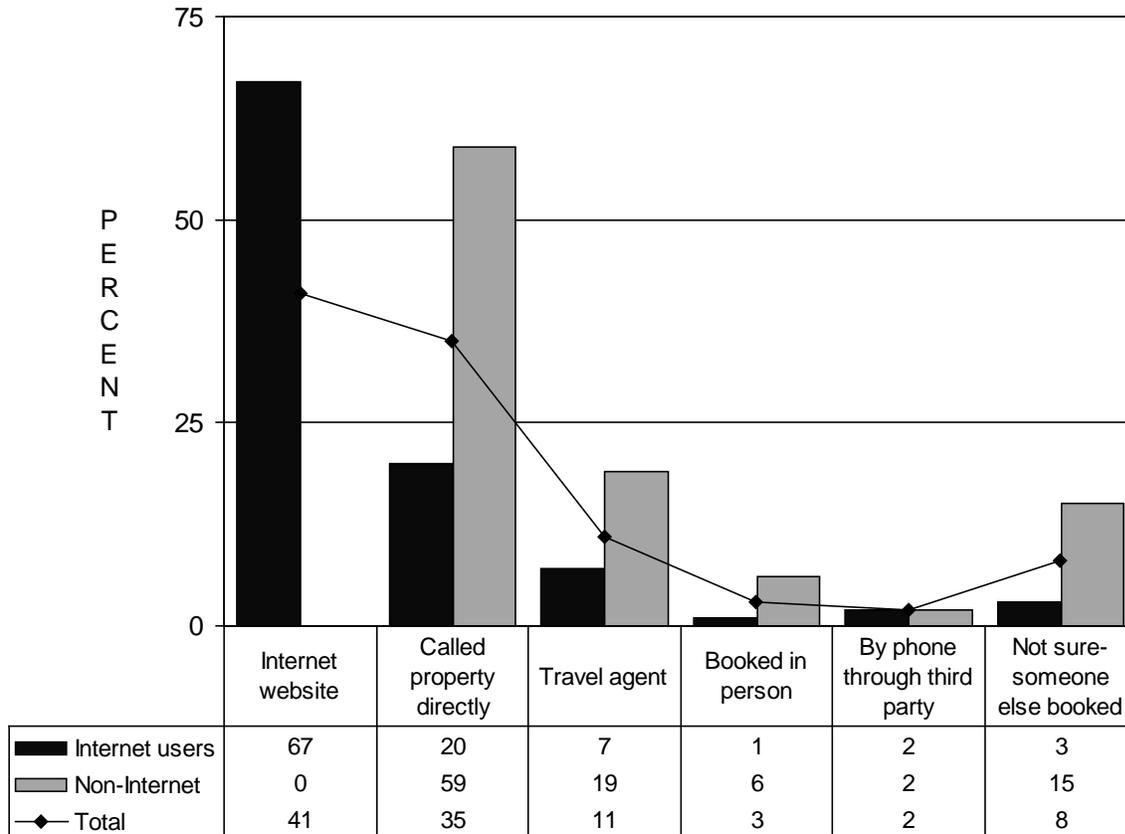


(Base Sizes: Internet users=2146, Non-Internet=1443, TOTAL=3591)

As Figure 35 shows, among those who lodged overnight in Las Vegas, Internet travel planners were significantly more likely than non-Internet users to have stayed on the Strip Corridor* (83% vs. 68%). Conversely, non-Internet users were more likely than Internet travel planners to have lodged either Downtown (8% vs. 4%), on the Boulder Strip (5% vs. 1%), or in outlying areas (15% vs. 10%).

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

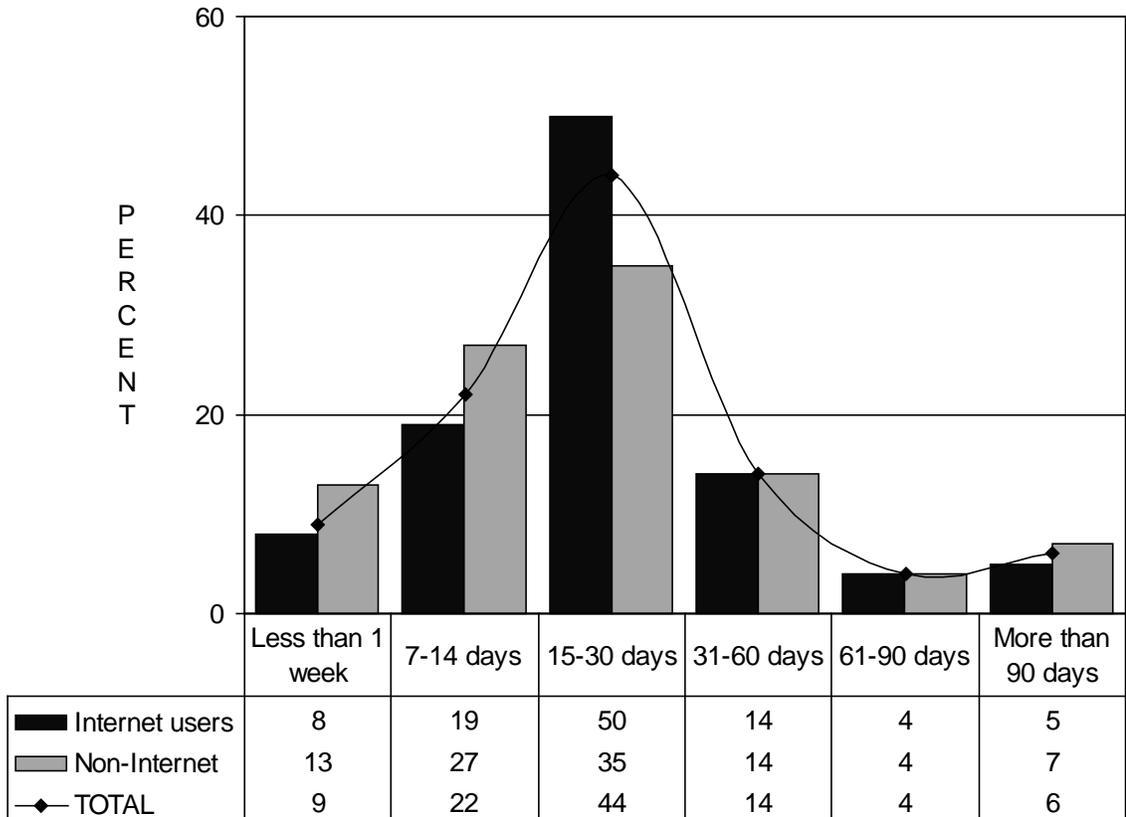
FIGURE 36
How Booked Accommodations
(Among Those Who Stayed In A Hotel/Motel/RV Park)



(Base Sizes: Internet users=2095, Non-Internet=1378, TOTAL=3475)

We asked visitors who lodged in a hotel, motel, or RV park, how they had booked their accommodations (Figure 36). Two-thirds of Internet travel planners (67%) said they booked their accommodations through an Internet website, while non-Internet users were most likely to say they booked their accommodations by calling the property directly (59% vs. 20% of Internet users). Non-Internet users were also more likely than Internet travel planners to use other booking methods including a travel agent (19% vs. 7%) or booking in person (6% vs. 1%).

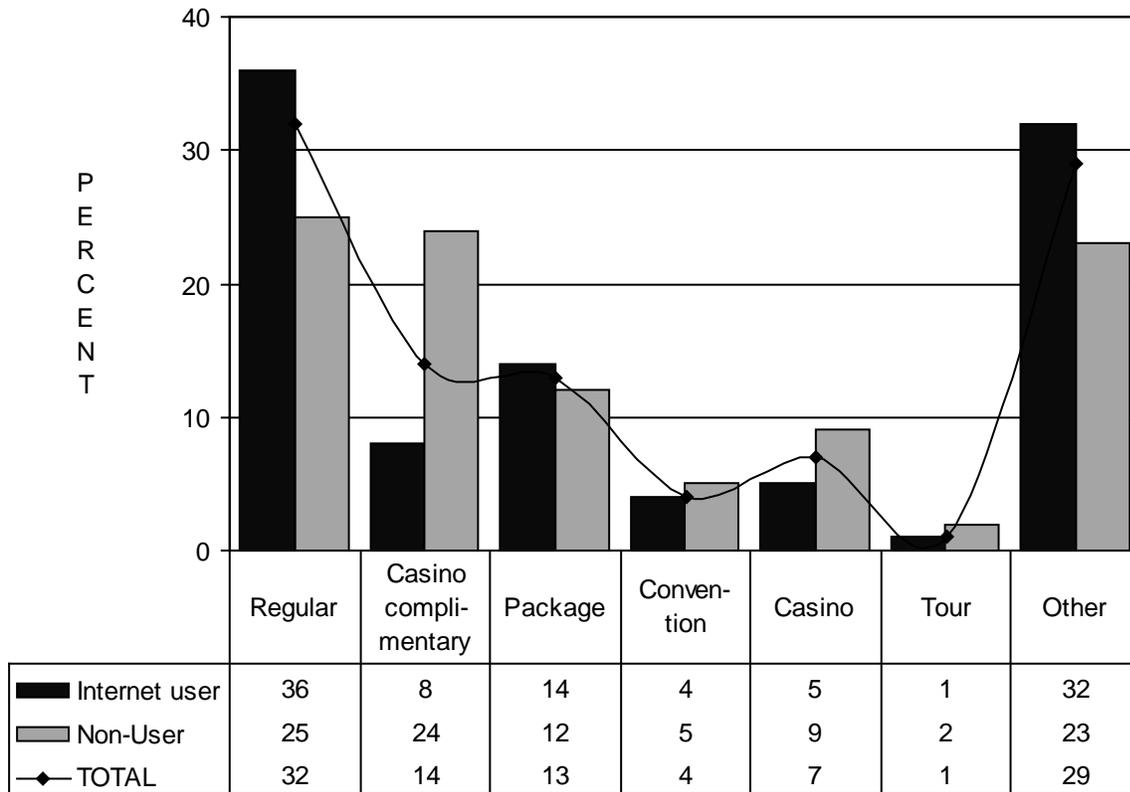
FIGURE 37
Advance Booking Of Accommodations
(Among Those Who Stayed In A Hotel/Motel/RV Park)



(Base Sizes: Internet users=2095, Non-Internet=1378, TOTAL=3475)

Among those visitors who stayed in a hotel, motel, or RV park, Internet travel planners tended to make their lodging arrangements farther in advance than non-Internet users (Figure 37). For example, Internet travel planners were more likely to make their lodging reservations two weeks to one month in advance (50% compared to 35% of non-Internet users). By contrast, non-Internet users were more likely than Internet users to book their accommodations two weeks or less before they arrived (40% vs. 27%).

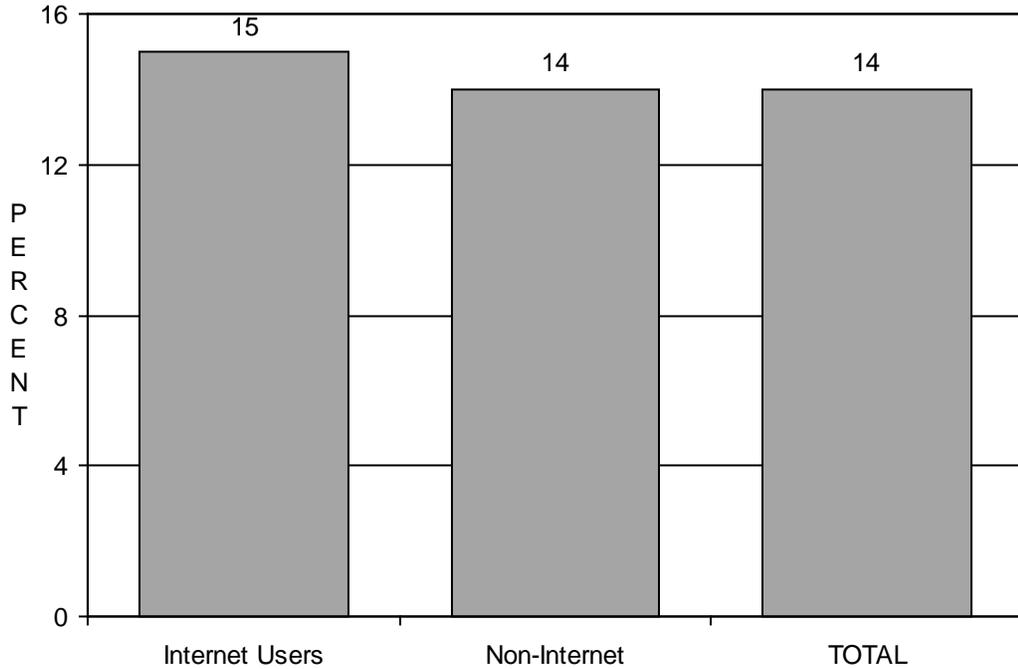
FIGURE 38
Type Of Room Rates
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Internet users=2084, Non-Internet=1310, TOTAL=3398)

Looking at the type of room rates received by hotel/motel lodgers (Figure 38), Internet travel planners were more likely than non-Internet users to have paid a regular room rate (36% vs. 25%) or some other rate (32% vs. 23%) – but they were less likely than non-Internet users to have received a casino rate (5% vs. 9%) or casino complimentary rate (8% vs. 24%).

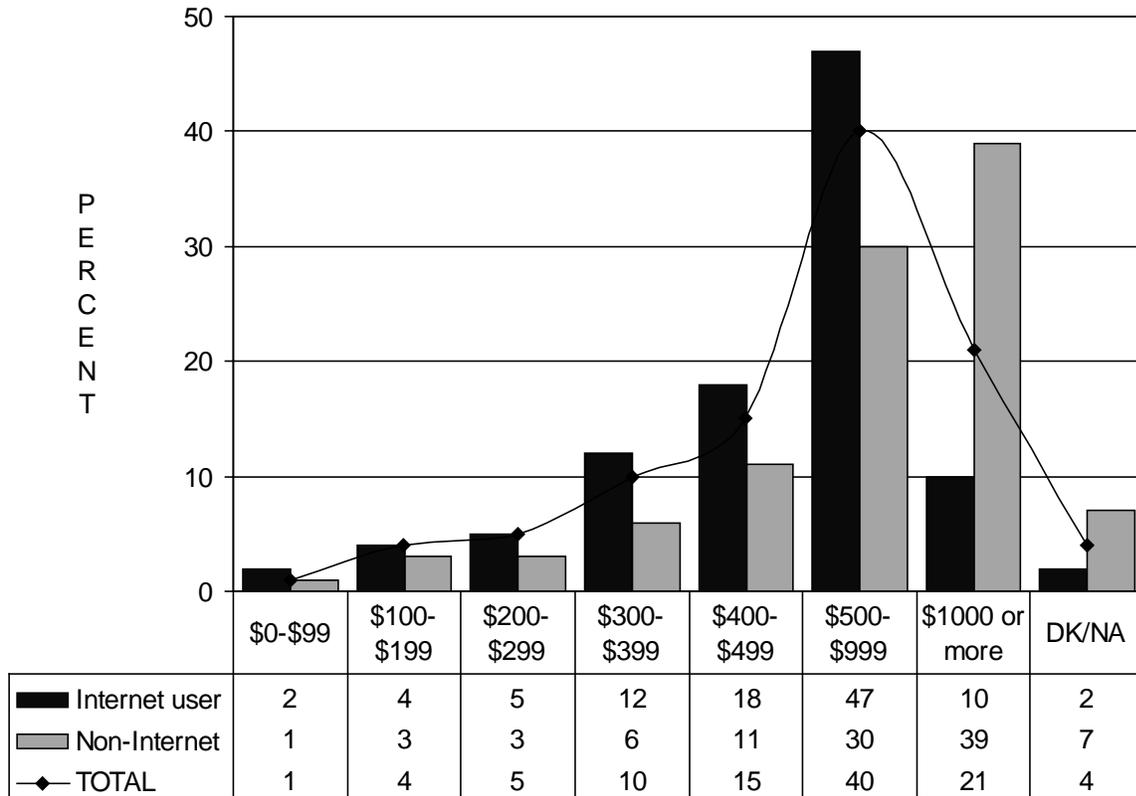
FIGURE 39
Package Purchasers
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Internet users=2084, Non-Internet=1310, TOTAL=3398)

Fourteen percent (14%) of hotel/motel lodgers were visiting Las Vegas as part of a tour group or package deal. (Figure 39) There was no significant difference between Internet travel planners and non-Internet users on this measure.

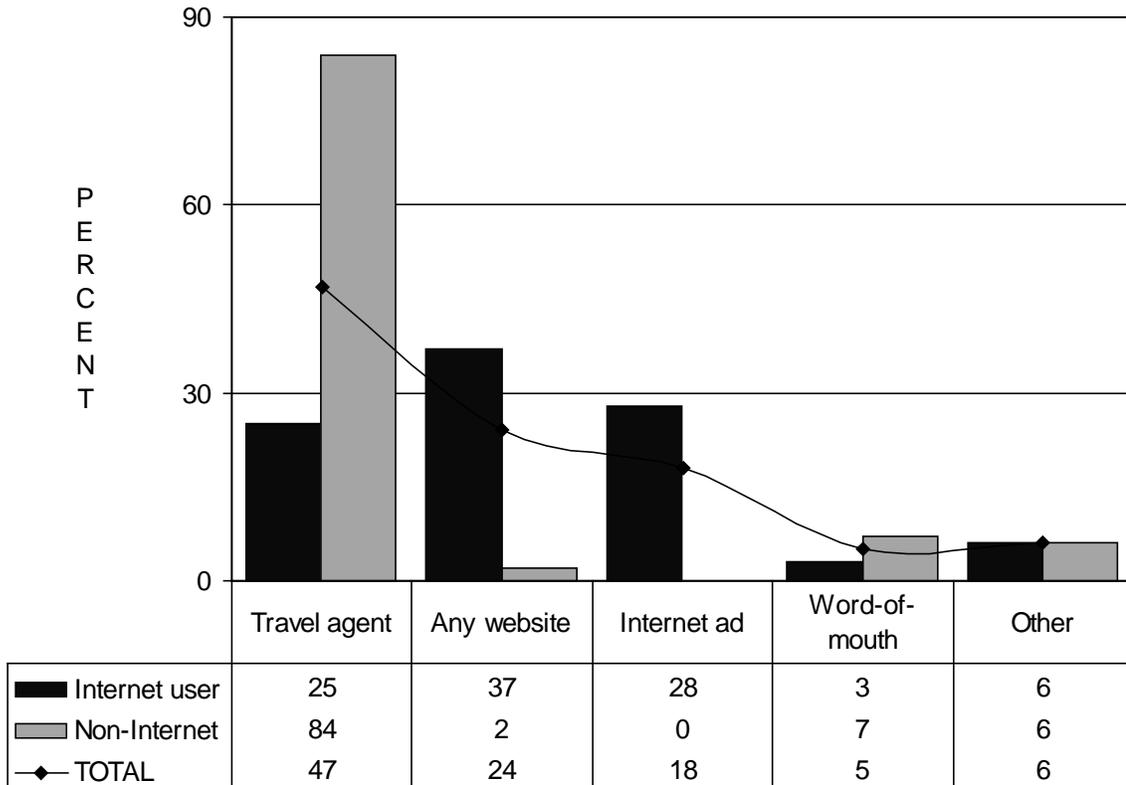
FIGURE 40
Cost Of Package Per Person
(Among Those Who Bought A Package)



(Base Sizes: Internet users=300, Non-Internet=178, TOTAL=478)
(Means: Internet users=\$608.03, Non-Internet=\$983.31, TOTAL=\$743.65)

We asked those who purchased either a hotel or a tour/travel group package how much their package cost per person (Figure 40). On average, package costs were significantly higher for non-Internet users (mean of \$983.31) than for Internet travel planners (mean of \$608.03).

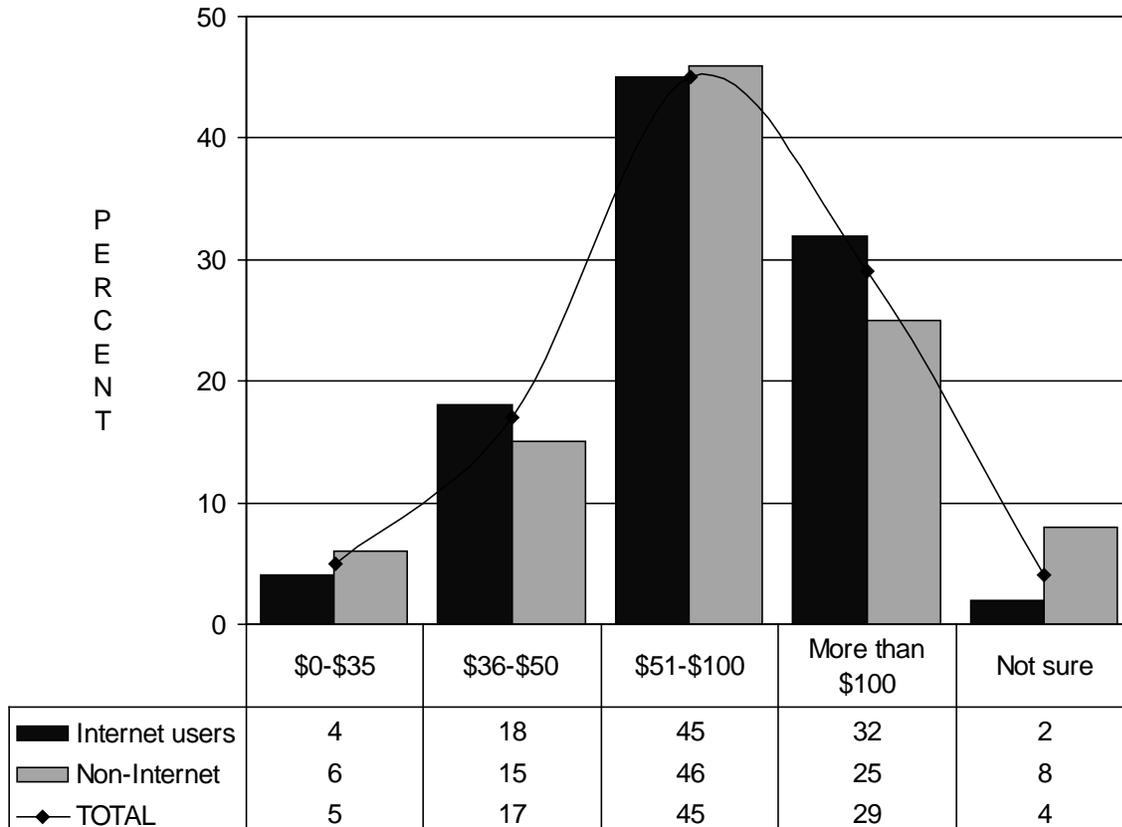
FIGURE 41
 Where First Heard About The Package
 (Among Those Who Bought A Package)



(Base Sizes: Internet users=300, Non-Internet=178, TOTAL=478)

Package purchasers were asked where they first heard about the package they bought (Figure 41). As might be expected, Internet travel planners were most likely to have first heard about their package from a website (37% vs. 2% of non-Internet travel planners). More than one-quarter (28%) of Internet travel planners heard of the package from an Internet advertisement. Package purchasers who did not use the Internet to plan their trip to Las Vegas were significantly more likely than Internet planners to have first learned about their package through a travel agent (84% vs. 25%).

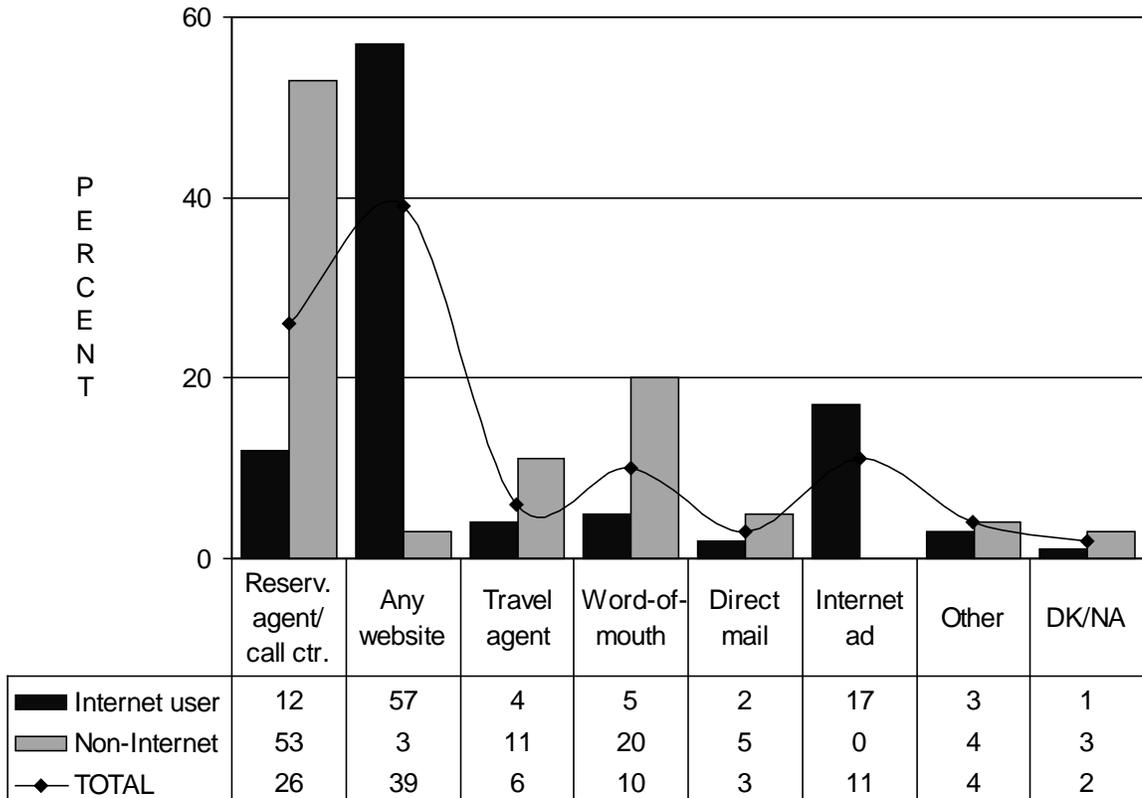
FIGURE 42
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel Or Motel/Non-Package)



(Base Sizes: Internet users=1617, Non-Internet=816, TOTAL=2435)
(Means: Internet users=\$95.05, Non-Internet=\$89.11, TOTAL=\$93.13)

We looked at lodging expenditures among visitors whose room was *not* part of a travel package (Figure 42). Among these visitors, the average daily room rate paid by Internet travel planners was \$95.05, while non-Internet users paid an average of \$89.11. This difference was not statistically significant. However, Internet travel planners were significantly more likely than non-Internet users to pay more than \$100 for their lodging (32% vs. 25%).

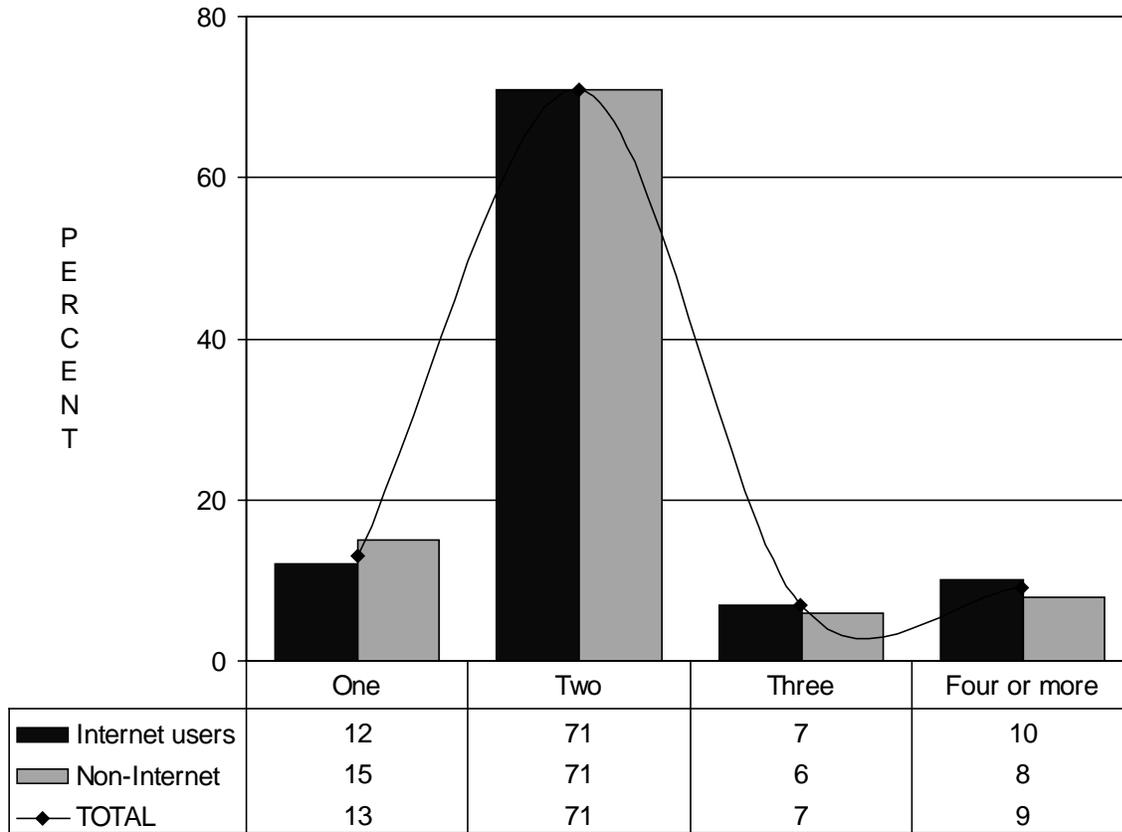
FIGURE 43
How First Found Out About Room Rate
(Among Those Staying In A Hotel Or Motel/Non-Package)



(Base Sizes: Internet users=1617, Non-Internet=816, TOTAL=2435)

Visitors who paid a non-package rate were asked how they first found out about the room rate they paid (Figure 43). Again, Internet travel planners were most likely to have mentioned a website (57% vs. 3% of non-Internet users) or an Internet ad (17%). Visitors who did not use the Internet to plan their travel were significantly more likely than Internet planners to mention a reservation agent or call center (53% vs. 12%), word-of-mouth (20% vs. 5%), a travel agent (11% vs. 4%), or direct mail (5% vs. 2%).

FIGURE 44
Number Of Room Occupants
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Internet users=2109, Non-Internet=1335, TOTAL=3447)
(Means: Internet users=2.2, Non-Internet=2.1, TOTAL=2.1)

Among visitors who stayed in a hotel or motel (Figure 44), most (71%) said that two people stayed in their room. However, Internet travel planners were significantly more likely than non-Internet users to say four or more people stayed in their room (10% vs. 8%), while non-Internet users were significantly more likely than Internet travel planners to say they were lodging alone (15% vs. 12%). The average number of room occupants was significantly higher for Internet travel planners (2.2) than for non-Internet users (2.1).

FIGURE 45
 Average Trip Expenditures On Food & Drink —
 And On Local Transportation
 (Including Visitors Who Spent Nothing In That Category)

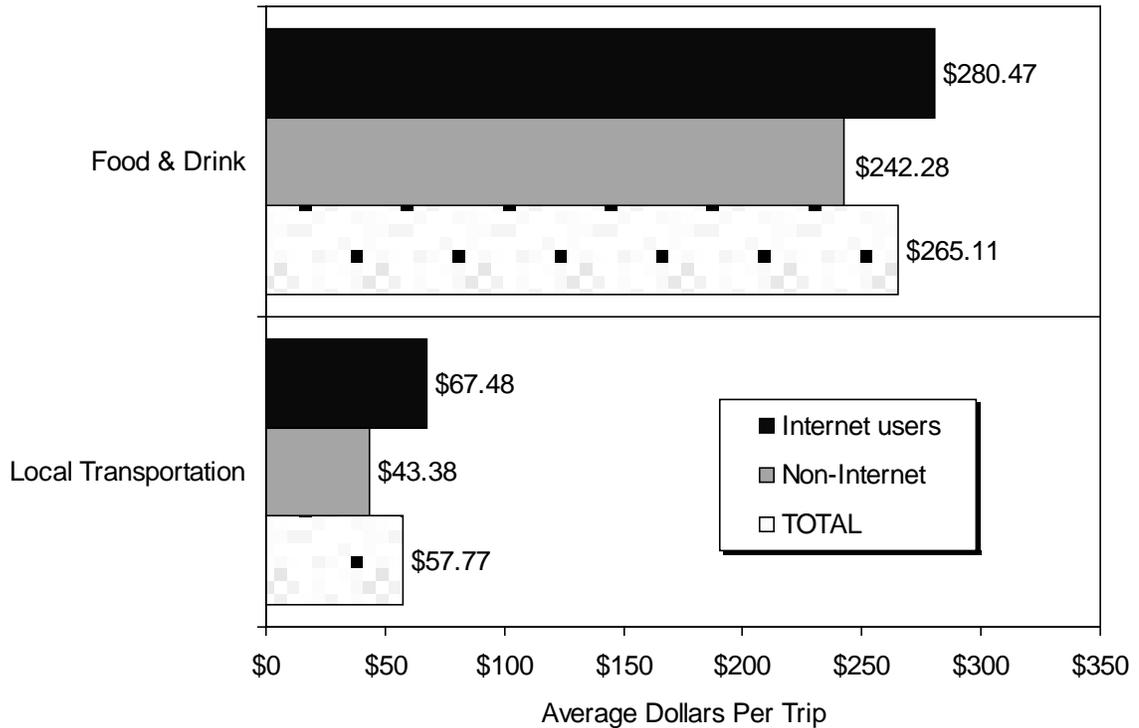
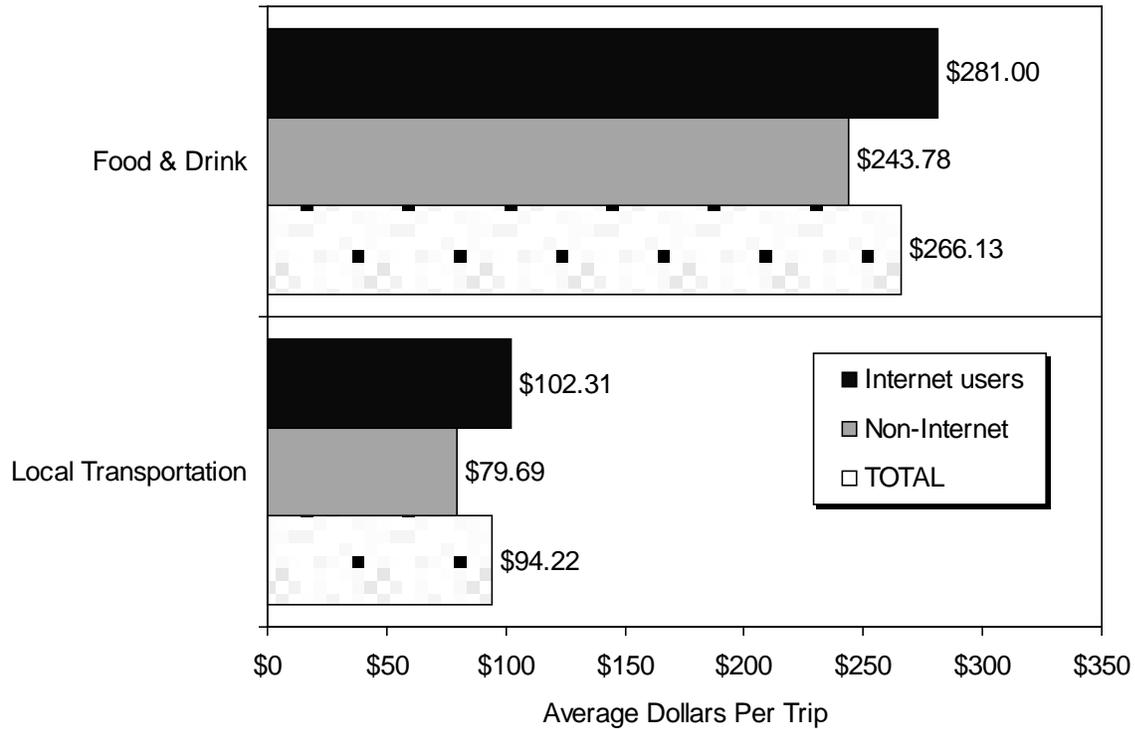


Figure 45 shows the average trip expenditures on food and drink and on local transportation *including visitors who said they spent nothing in these categories*. On average, Internet travel planners spent significantly more for food and drink (mean of \$280.47) than non-Internet users (\$242.28). Internet travel planners also spent significantly more on average for local transportation (mean of \$67.48) than non-Internet users (\$43.38).

FIGURE 46
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Among Those Who Spent Money In That Category)



(Base Sizes, Food & Drink: Internet users=2142, Non-Internet=1444, TOTAL=3588)

(Base Sizes, Local Transportation: Internet users=1416, Non-Internet=791, TOTAL=2209)

Among those who actually spent money (Figure 46), Internet travel planners again spent more for food and drink (mean of \$281.00) than non-Internet users (\$243.78). Internet travel planners also spent more on local transportation (\$102.31) than non-Internet users (\$79.69).

FIGURE 47
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Including Visitors Who Spent Nothing In That Category)

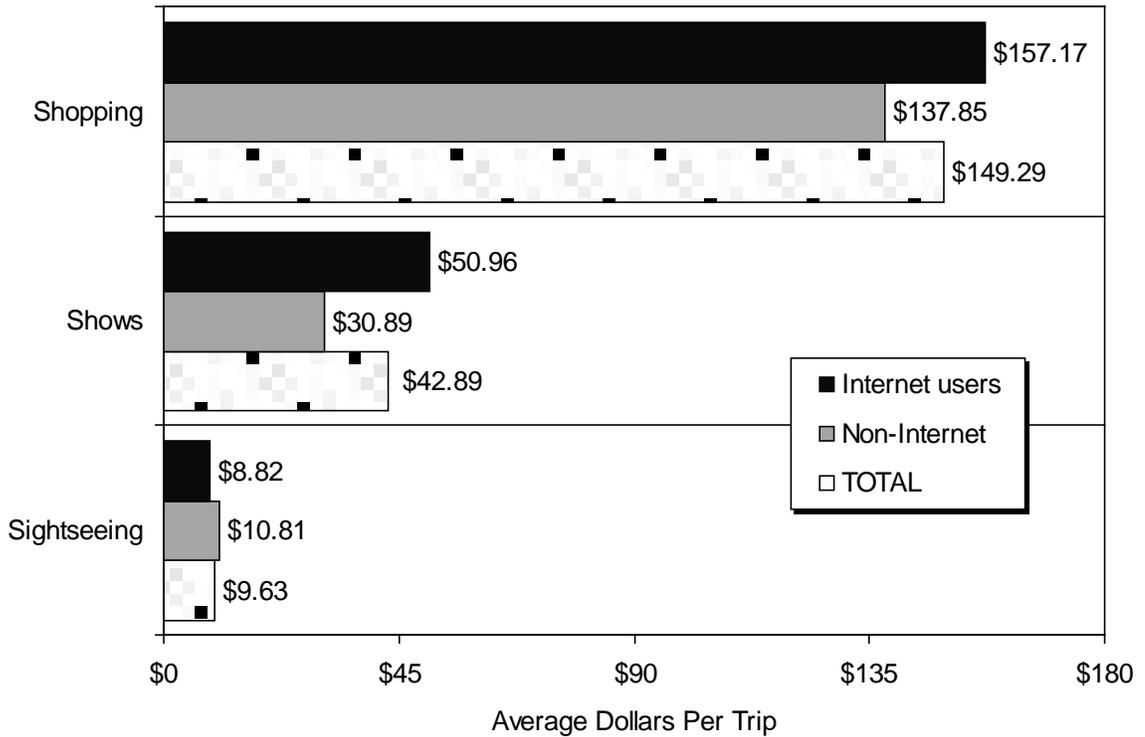
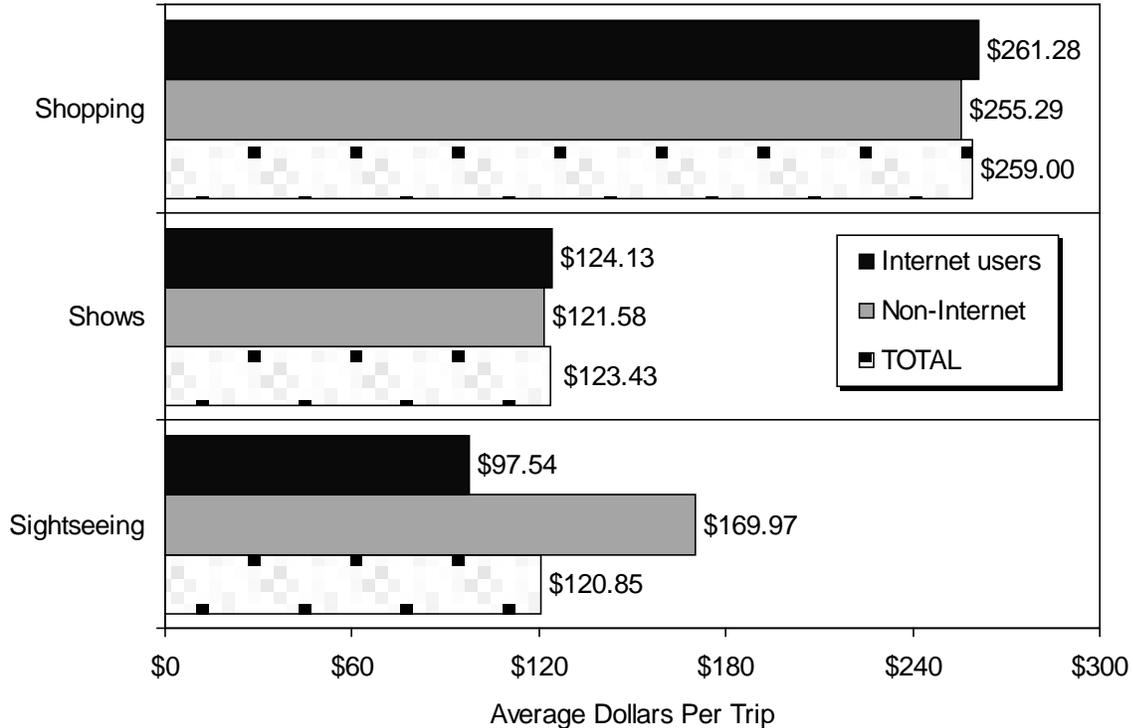


Figure 47 shows average expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas, including visitors who said they spent nothing in these categories. Overall, visitors spent an average of \$149.29 on shopping and \$9.63 on sightseeing. Internet travel planners spent significantly more on average for shows (\$50.96) than non-Internet users (\$30.89).

FIGURE 48
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Among Those Who Spent Money In That Category)



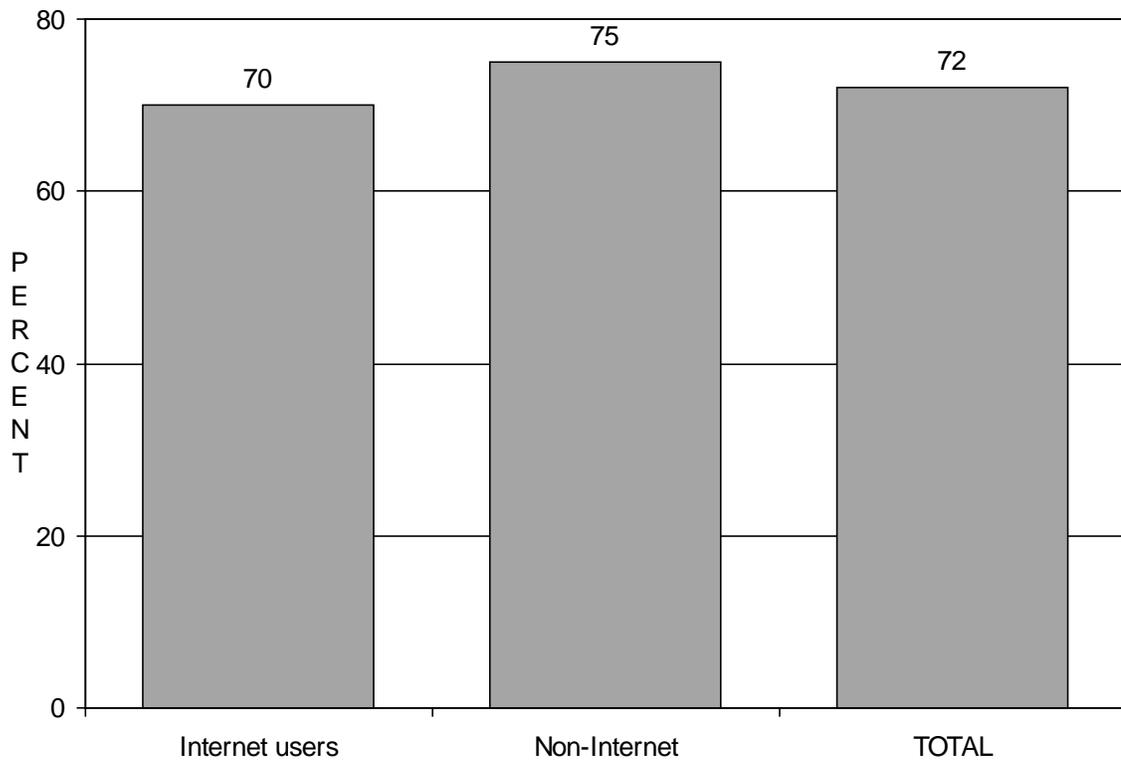
(Base Sizes, Shopping: Internet users=1291, Non-Internet=785, TOTAL=2077)
 (Base Sizes, Shows: Internet users=881, Non-Internet=373, TOTAL=1255)
 (Base Sizes, Sightseeing: Internet users=194, Non-Internet=92, TOTAL=287)

Among visitors who spent money in these categories (Figure 48), the overall average amount spent on shopping was \$259.00, with no significant difference between the amount spent by Internet travel planners (\$261.28) and non-Internet users (\$255.29) in this category. The overall average spent by visitors who spent money on shows and entertainment was \$123.43, again with no significant difference between the amount spent by Internet travel planners (\$124.13) and non-Internet users (\$121.58). However, non-Internet users spent significantly more on sightseeing on average (\$169.97) than Internet travel planners (\$97.54).

GAMING BEHAVIOR AND BUDGETS

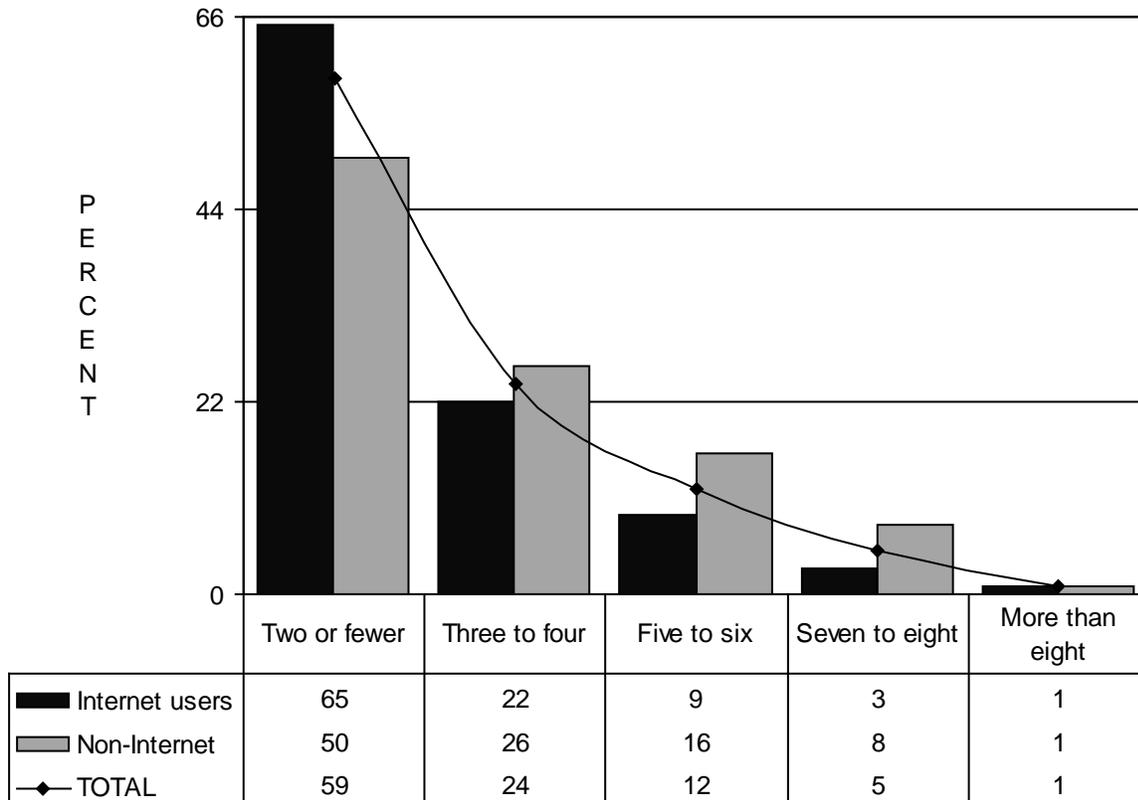
Seventy-two percent (72%) of all visitors gambled while in Las Vegas (Figure 49). Non-Internet users were significantly more likely to gamble than Internet travel planners (75% vs. 70%).

FIGURE 49
Whether Gambled While In Las Vegas*



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

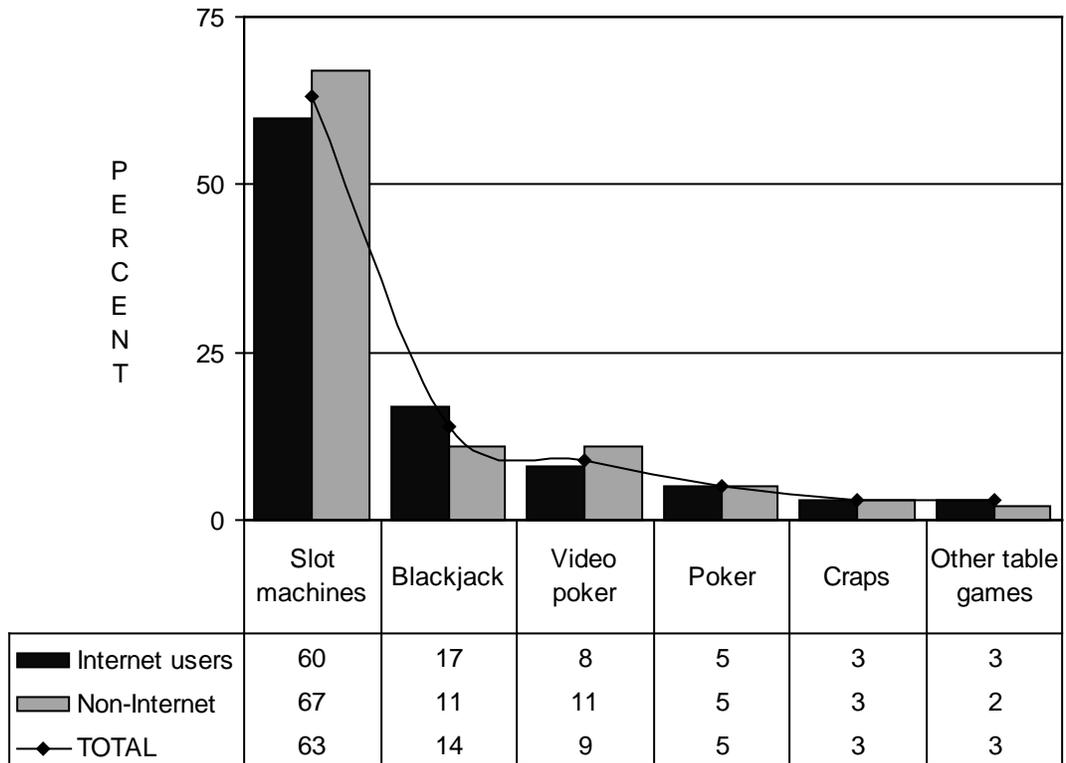
FIGURE 50
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



(Base Sizes: Internet users=1495, Non-Internet=1092, TOTAL=2589)
(Means: Internet users=2.3, Non-Internet=3.1, TOTAL=2.6)

Among those who gambled while in Las Vegas, Internet travel planners spent significantly less time gambling (average of 2.3 hours per day) than non-Internet users (3.1 hours per day) (Figure 50).

FIGURE 51
Casino Game Played Most Often*
(Among Those Who Gambled)

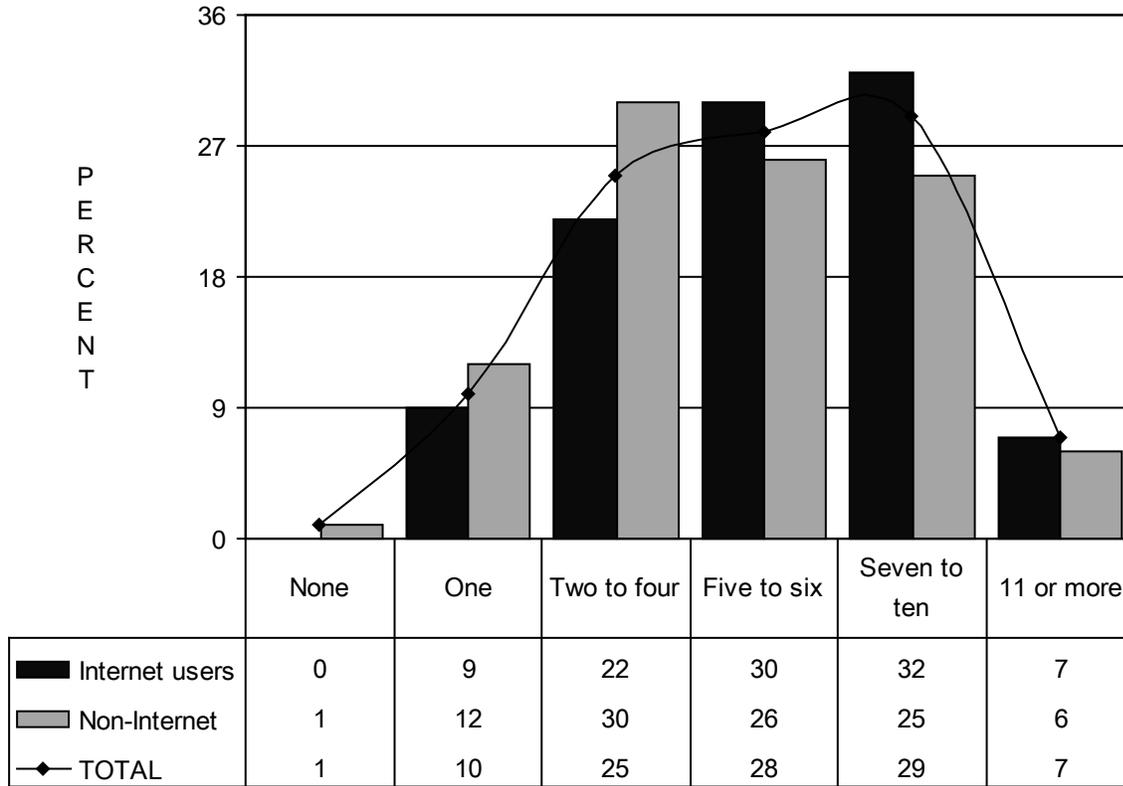


(Base Sizes: Internet users=1545, Non-Internet=1213, TOTAL=2759)

Those who gambled on their current trip to Las Vegas were asked which casino game they played the most often (Figure 51). Sixty-three percent (63%) of visitors said they played slot machines most frequently, while 14% mentioned blackjack. Those who did not use the Internet to plan their trip were significantly more likely than Internet travel planners to say they played slot machines (67% vs. 60%) or video poker (11% vs. 8%) most frequently, while Internet travel planners were more likely than non-Internet users to play blackjack most often (17% vs. 11%).

* These results are from 2011. This question is asked every other year and was not asked in 2012.

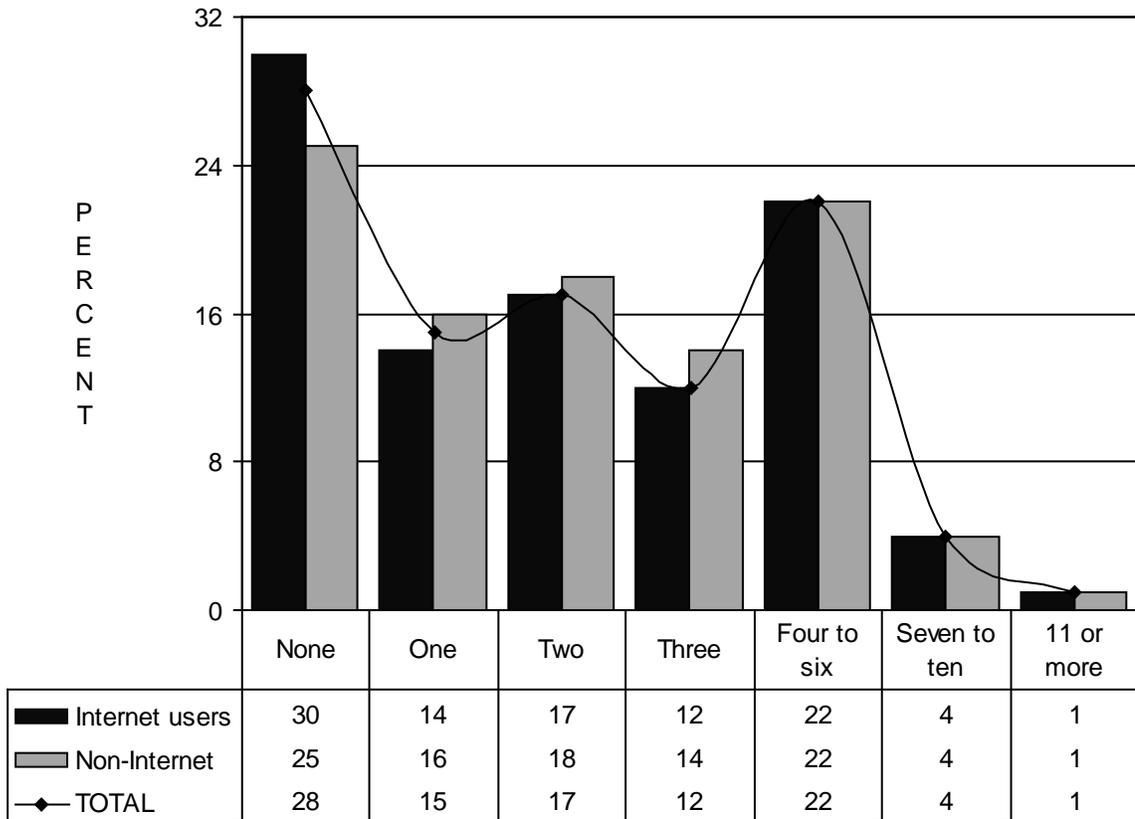
FIGURE 52
Number Of Casinos Visited



(Means: Internet users=6.1, Non-Internet=5.3, TOTAL=5.8)

All visitors to Las Vegas were asked how many casinos they had visited (Figure 52). Internet travel planners visited significantly more casinos on average (6.1) than non-Internet users (5.3).

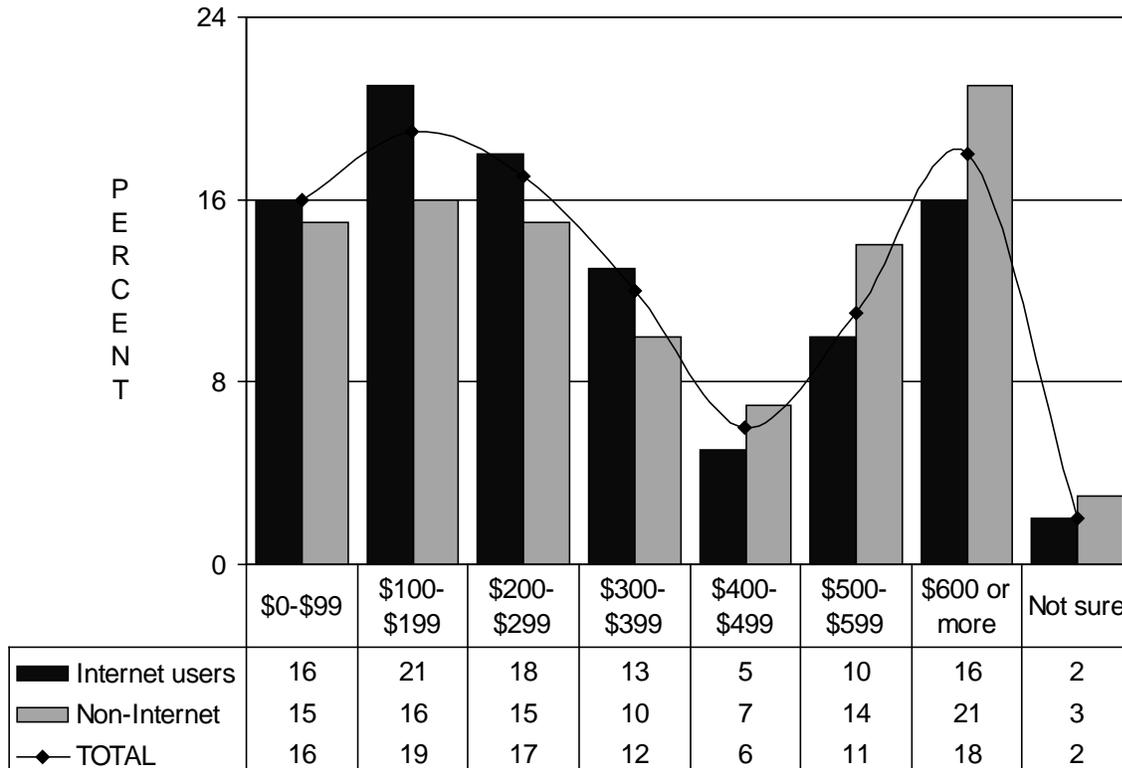
FIGURE 53
Number Of Casinos Where Gambled



(Means: Internet users=2.3, Non-Internet=2.4, TOTAL=2.4)

All visitors to Las Vegas were asked in how many casinos they had gambled (Figure 53). Internet travel planners gambled in an average of 2.3 casinos, while non-Internet users gambled at an average of 2.4 casinos. This difference was not statistically significant.

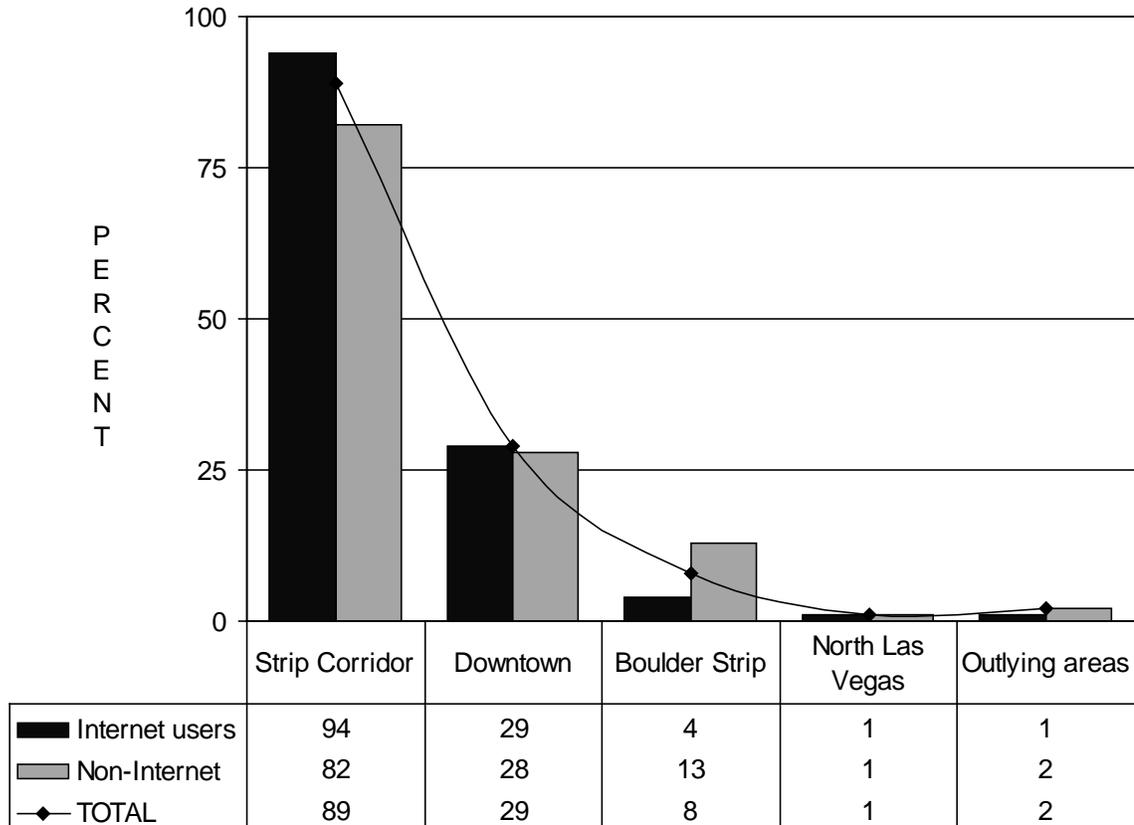
FIGURE 54
Trip Gambling Budget
(Among Those Who Gambled)



(Base Sizes: Internet Travel Users=1495, Non-Internet=1092, TOTAL=2589)
(Means: Internet Travel Users=\$439.94, Non-Internet=\$546.82, TOTAL=\$484.70)

Overall, Las Vegas visitors who gambled on their current trip budgeted an average of \$484.70 for gambling (Figure 54). Internet travel planners (mean of \$439.94) budgeted significantly less on gambling than non-Internet users (mean of \$546.82).

FIGURE 55
Where Visitors Gambled*
(Among Those Who Gambled)



(Base Sizes: Internet users=1545, Non-Internet=1213, TOTAL=2759)

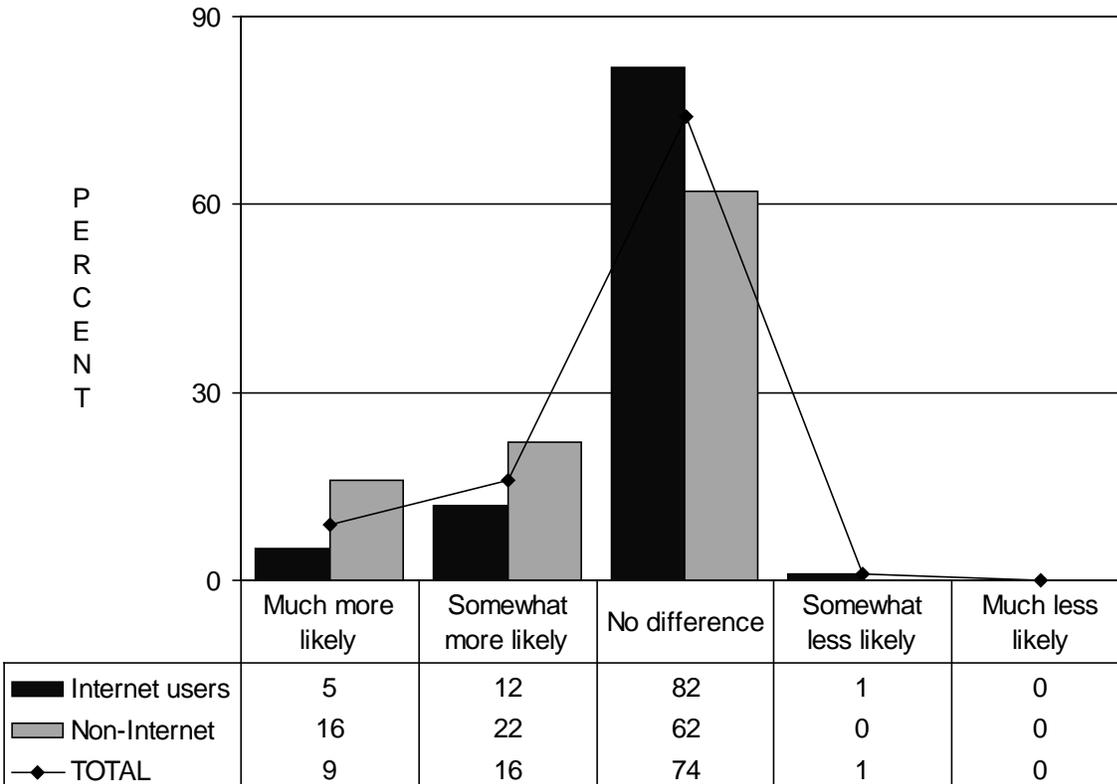
Those who used the Internet to plan their trip were more likely than non-Internet users to say they gambled on the Strip Corridor[†] (94% vs. 82%), while non-Internet users were more likely than Internet travel planners to report gambling on the Boulder Strip (13% vs. 4%) (Figure 55).

* Multiple responses were permitted.

These results are from 2011. This question is asked every other year and was not asked in 2012.

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

FIGURE 56
Likelihood Of Visiting Las Vegas With
More Places To Gamble Outside Las Vegas

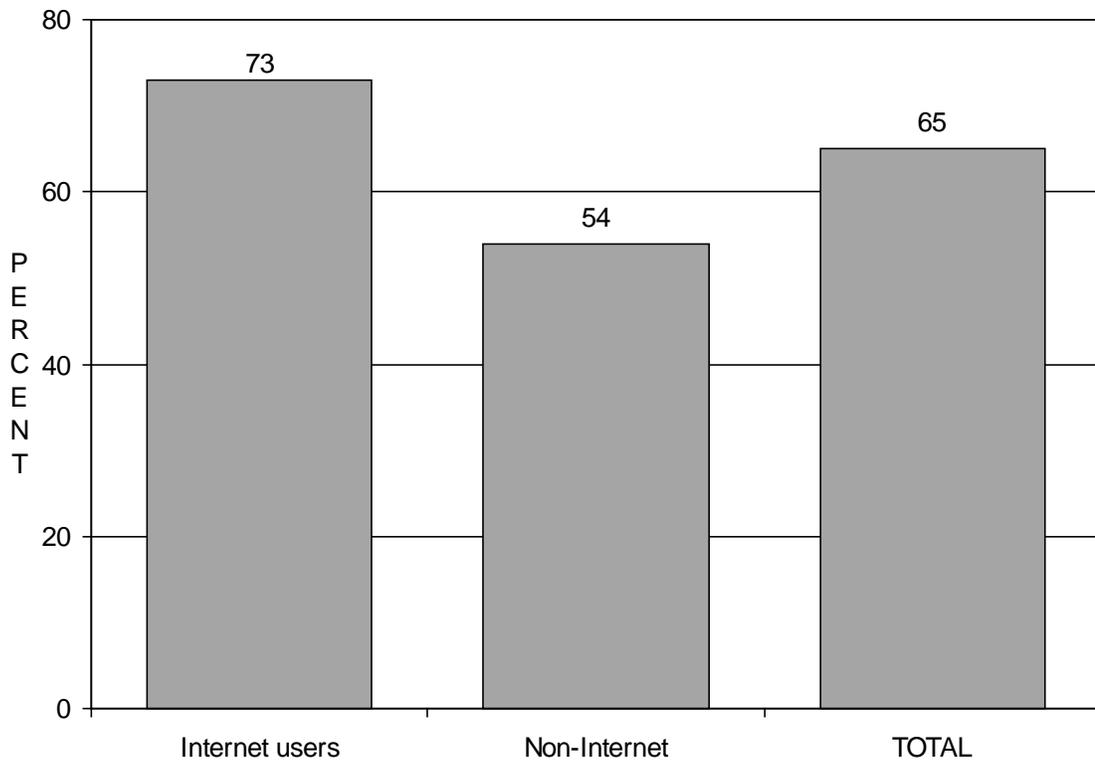


All visitors to Las Vegas were asked whether they feel they are more or less likely to visit because there are now more places to gamble outside of Las Vegas (Figure 56). Non-Internet users were significantly more likely than Internet travel planners to say that outside gaming venues actually made them *more likely to visit* (38% vs. 17%). Internet travel planners were more likely than non-Internet users to say outside gaming venues made no difference in their decision to visit Las Vegas (82% vs. 62%).

ENTERTAINMENT

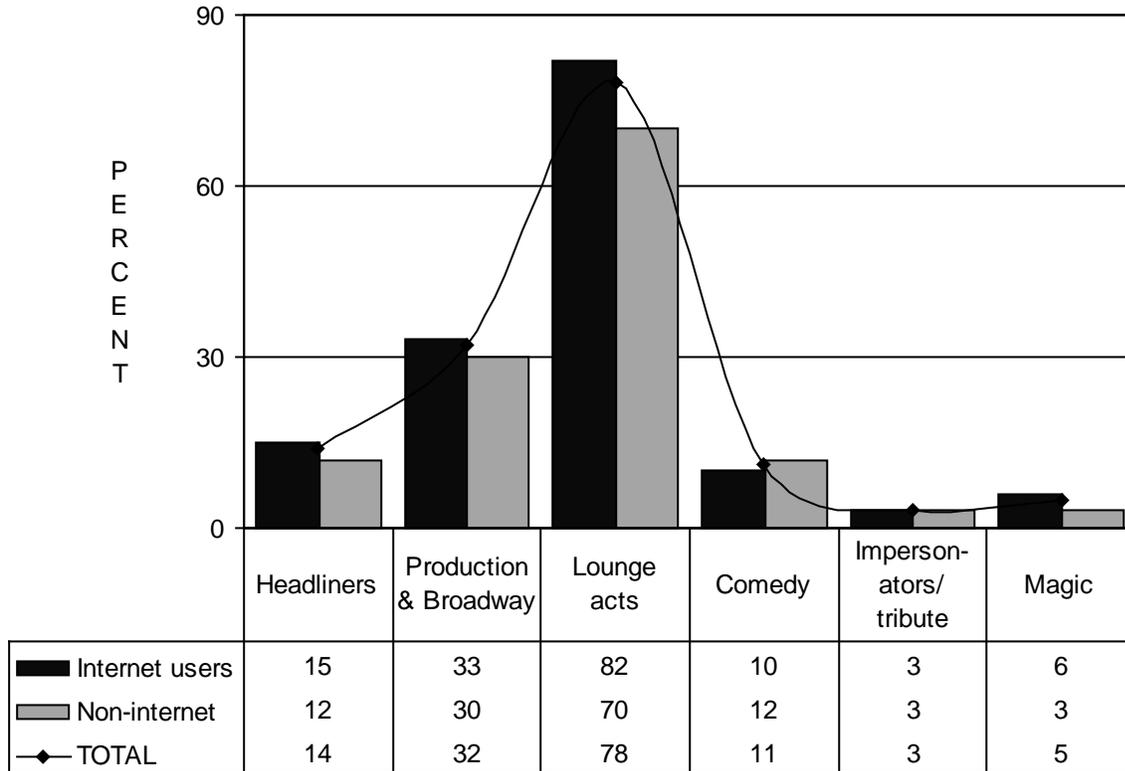
During their stay in Las Vegas, Internet travel planners were significantly more likely than non-Internet users to have seen at least one show (73% vs. 54%) (Figure 57).

FIGURE 57
Entertainment Attendance



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

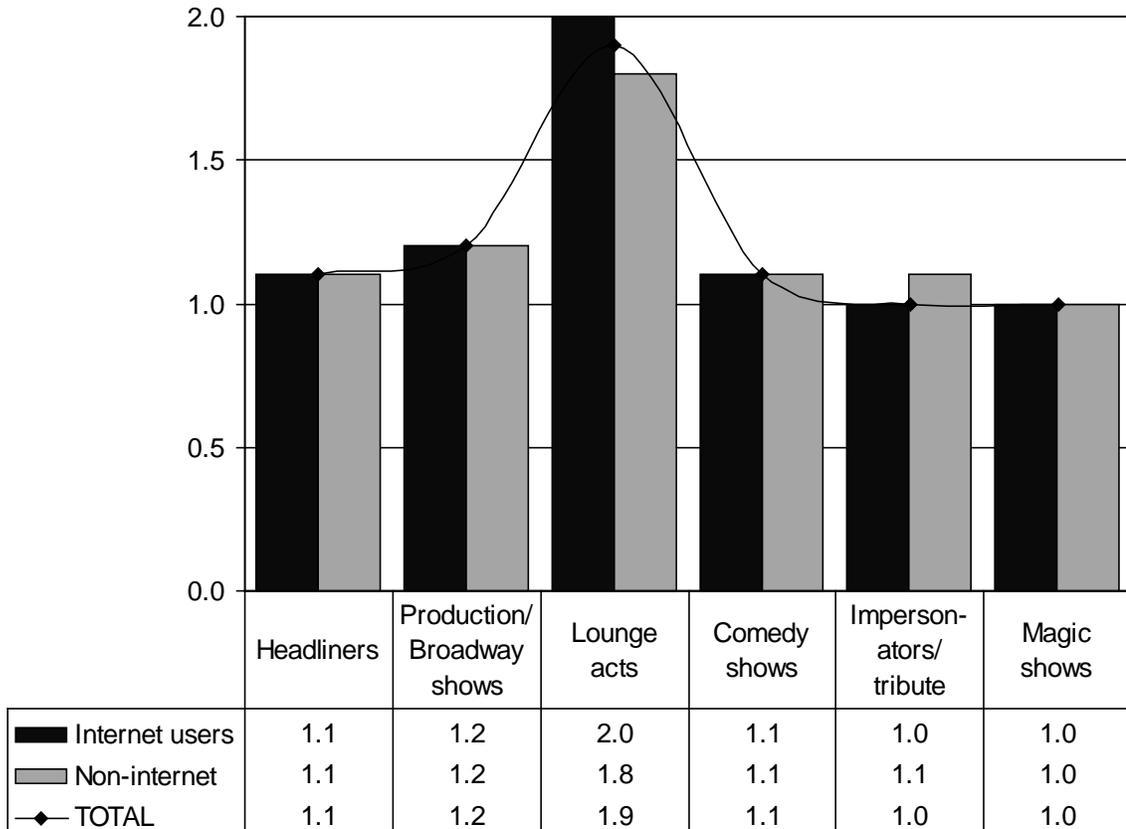
FIGURE 58
Types Of Entertainment*
(Among Those Who Attended Some Form Of Entertainment)



*Multiple responses permitted.
(Base Sizes: Internet Travel Users=1562, Non-Internet=786, TOTAL=2349)

Among those who saw a show while on their most recent trip to Las Vegas (Figure 58), Internet travel planners were significantly more likely than non-Internet users to have seen a lounge act (82% vs. 70%) or a magic act (6% vs. 3%).

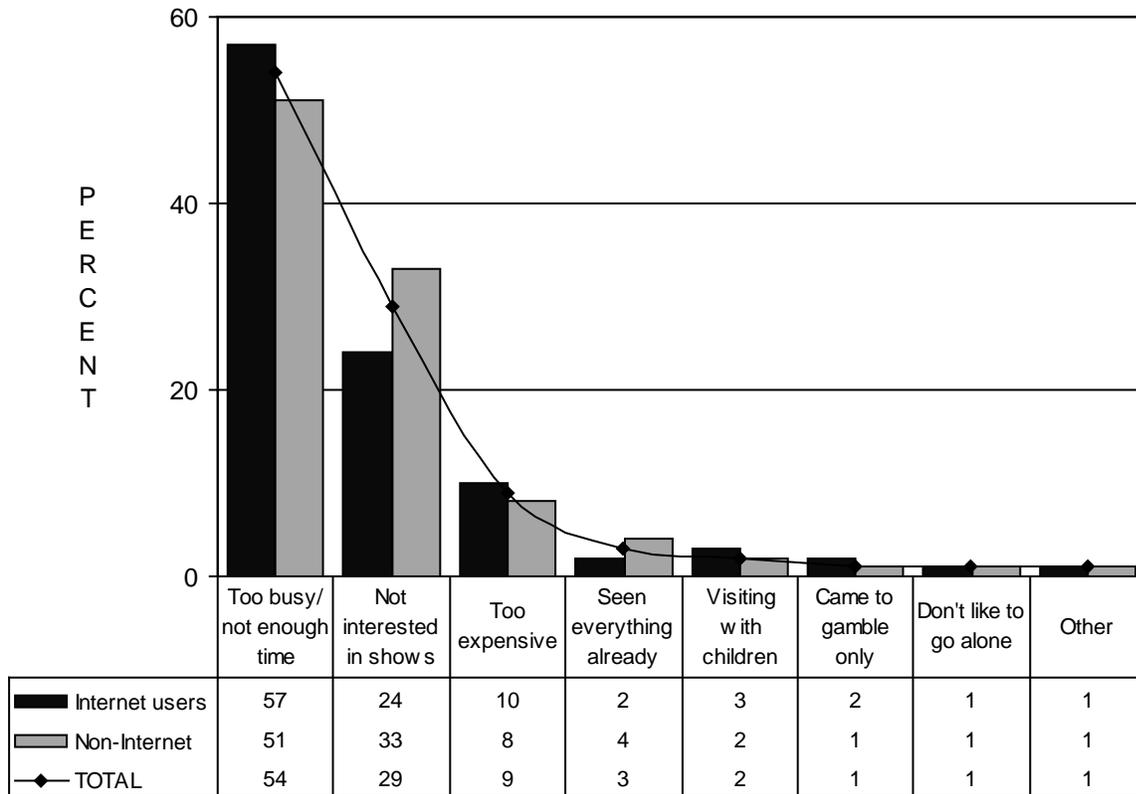
FIGURE 59
Average Number Of Shows Attended*
(Among Those Who Attended Some Form Of Entertainment)



*Multiple responses permitted.
(Base Sizes: First-time Visitors=1562, Non-Internet=786, TOTAL=2349)

Visitors who saw shows were asked how many shows they saw of each type (Figure 59). On average, Internet travel planners saw significantly more lounge acts (average of 2.0 shows) than non-Internet users (1.8).

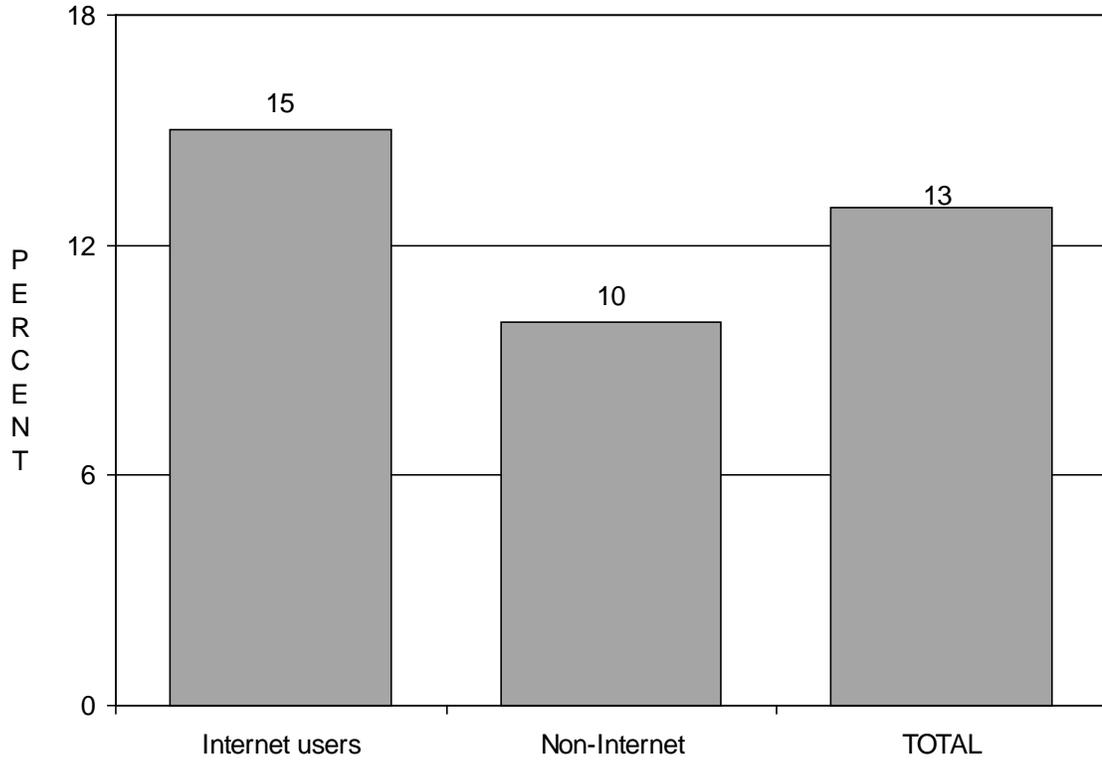
FIGURE 60
Main Reason For Not Attending Any Shows
(Among Those Who Attended No Shows)



(Base Sizes: Internet Travel Users=584, Non-Internet=667, TOTAL=1253)

Visitors who did not attend any shows while in Las Vegas were asked why (Figure 60). The most common reason cited was being too busy or not having enough time (54%). Internet travel planners were significantly more likely than non-Internet users to say they were too busy (57% vs. 51%) but less likely to say it was because they were not interested in shows (24% vs. 33%).

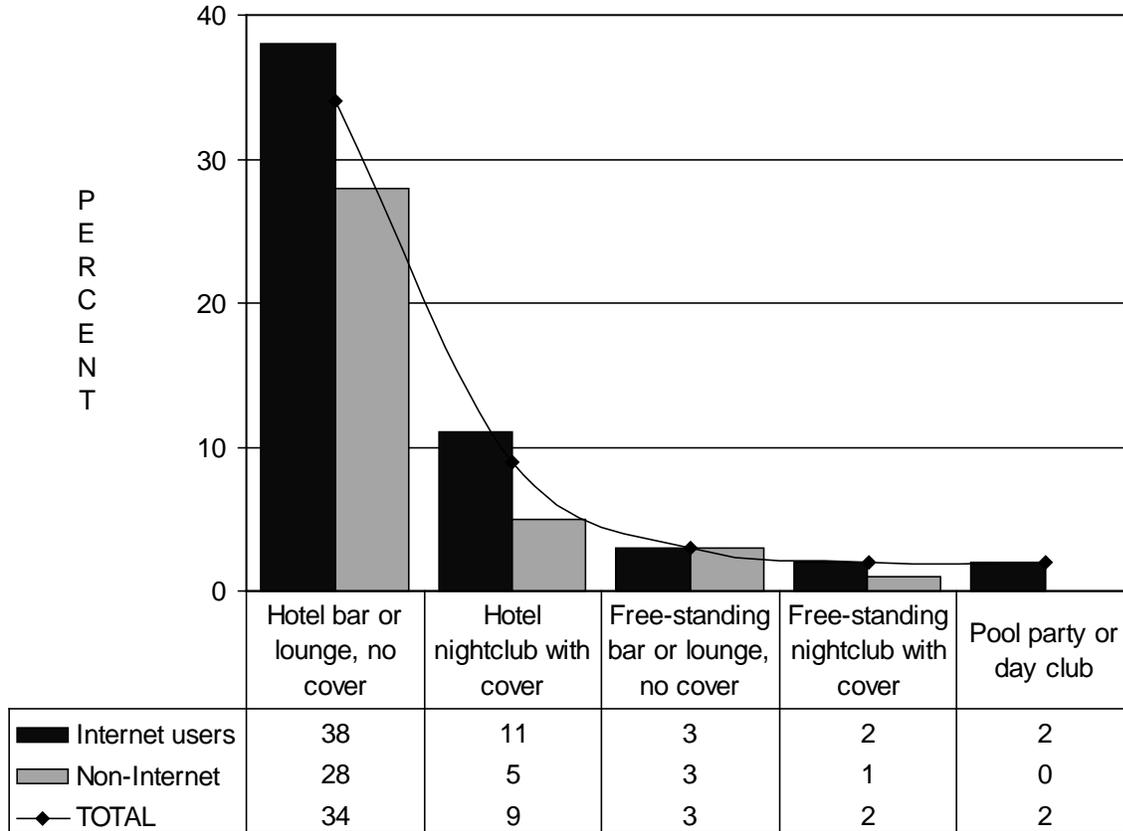
FIGURE 61
Whether Has Been To Other Paid Attractions*



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

We asked visitors if during their current trip to Las Vegas they had been to other Las Vegas attractions for which they had to pay — such as theme parks, water parks, or virtual reality rides (Figure 61). Internet travel planners were significantly more likely to have done so than non-Internet users (15% vs. 10%).

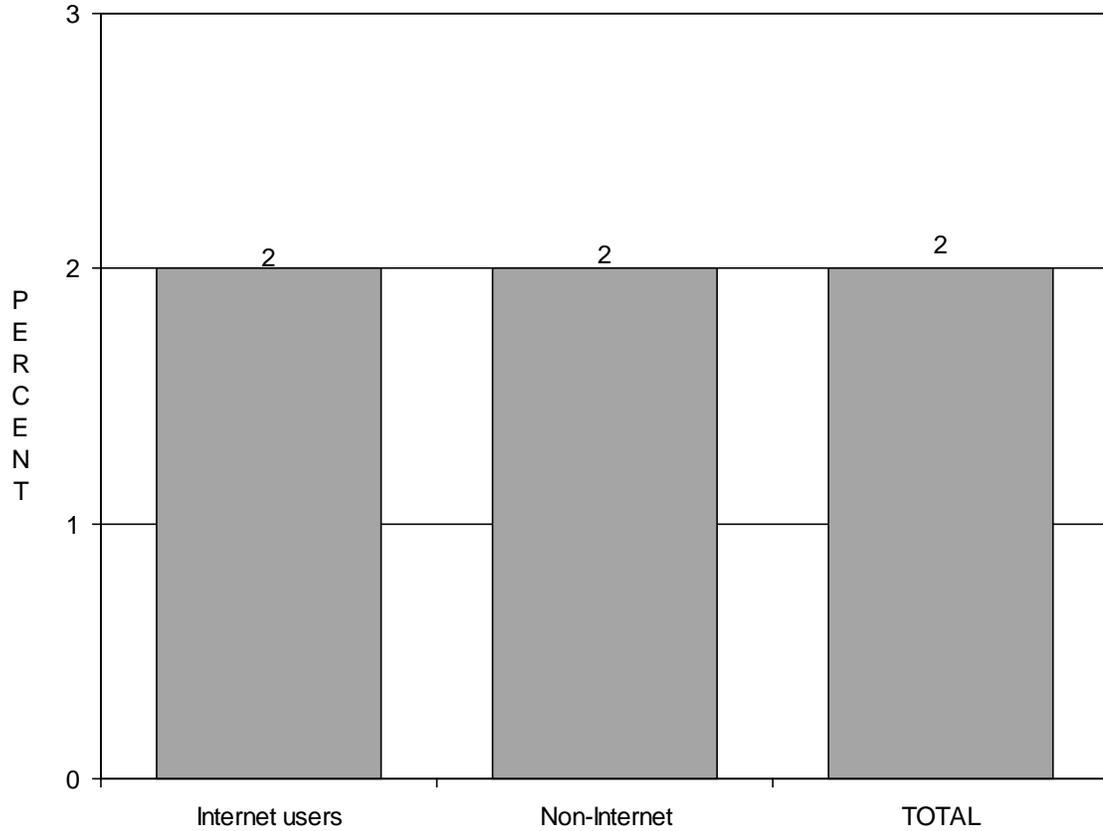
FIGURE 62
Whether Has Been To Nightclubs, Bars, And Lounges*



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

Visitors were asked if they visited nightclubs, bars, lounges, or pool parties or day clubs while in Las Vegas (Figure 62). Internet travel planners were significantly more likely than non-Internet users to say they had been to a no-cover hotel bar or lounge (38% vs. 28%), a hotel nightclub with a cover (11% vs. 5%), or a pool party or day club (2% vs. less than 1%).

FIGURE 63
Whether Played Golf*

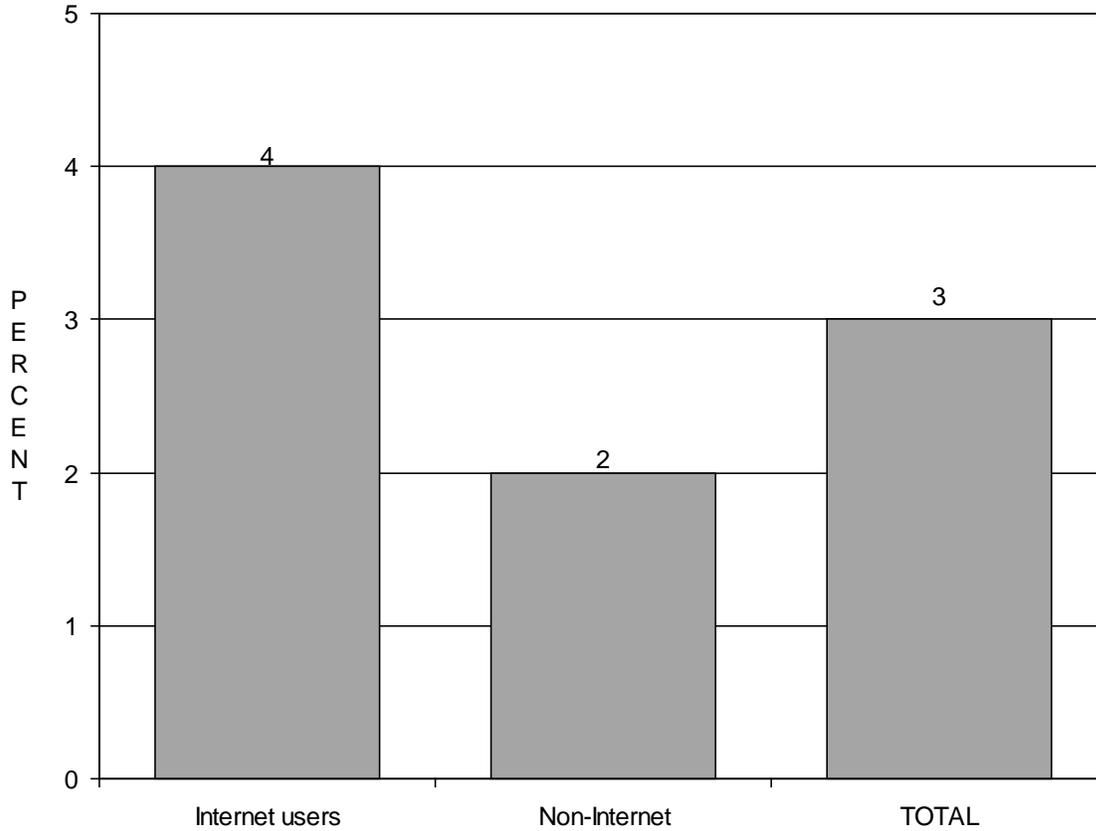


*Only "yes" responses are reported in this figure.

Two percent (2%) of both Internet travel planners and non-Internet users said they had played golf during their current visit to Las Vegas (Figure 63).

* These results are from 2011. This question is asked every other year and was not asked in 2012.

FIGURE 64
Whether Visited A Spa



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

Visitors were asked if they had visited a spa during this trip to Las Vegas (Figure 64). Internet travel planners (4%) were significantly more likely than non-Internet users (2%) to say they had visited a spa.

ATTITUDINAL INFORMATION

Ninety-four percent (94%) of all visitors said that they were “very satisfied” with their visit to Las Vegas (Figure 65). There was no significant difference between Internet travel planners and non-Internet users on this measure.

FIGURE 65
Satisfaction With Visit

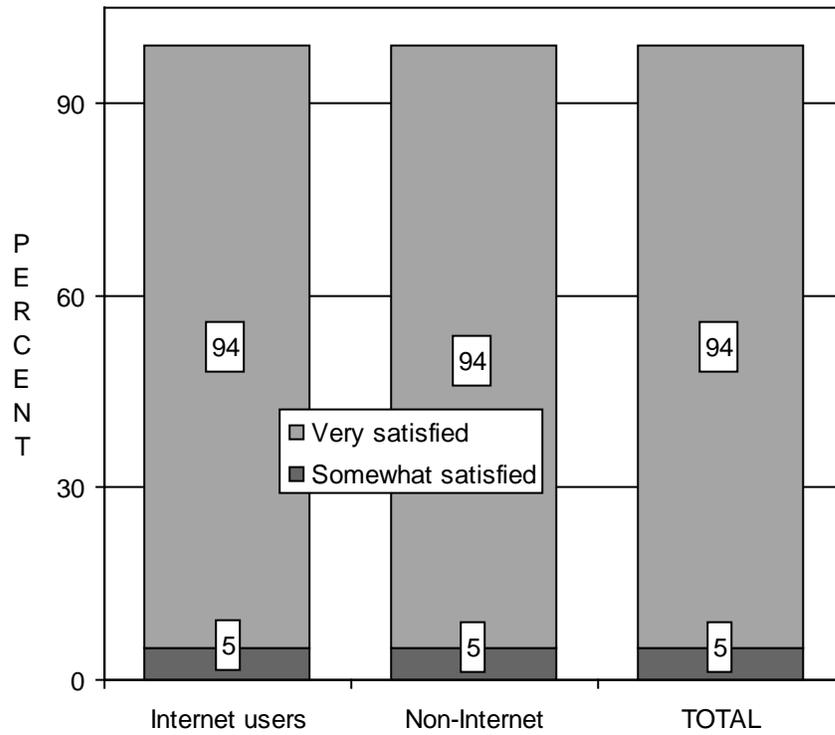
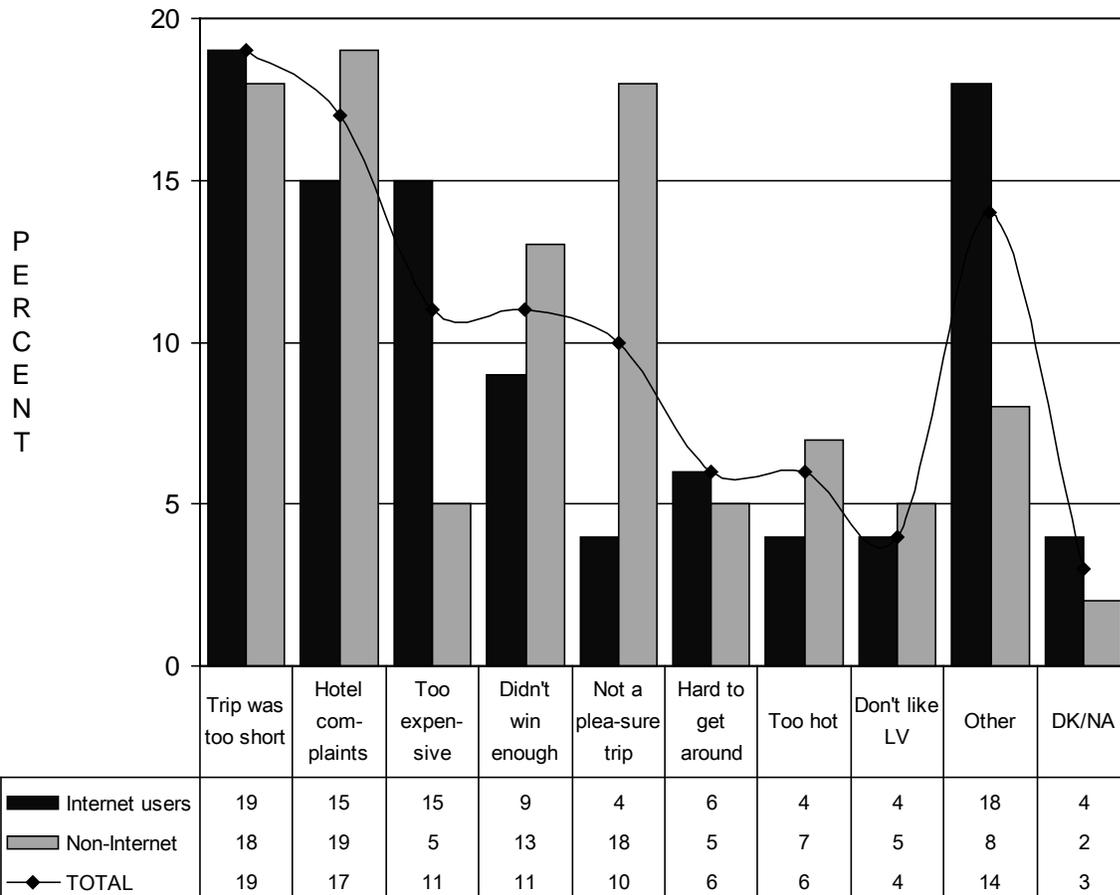
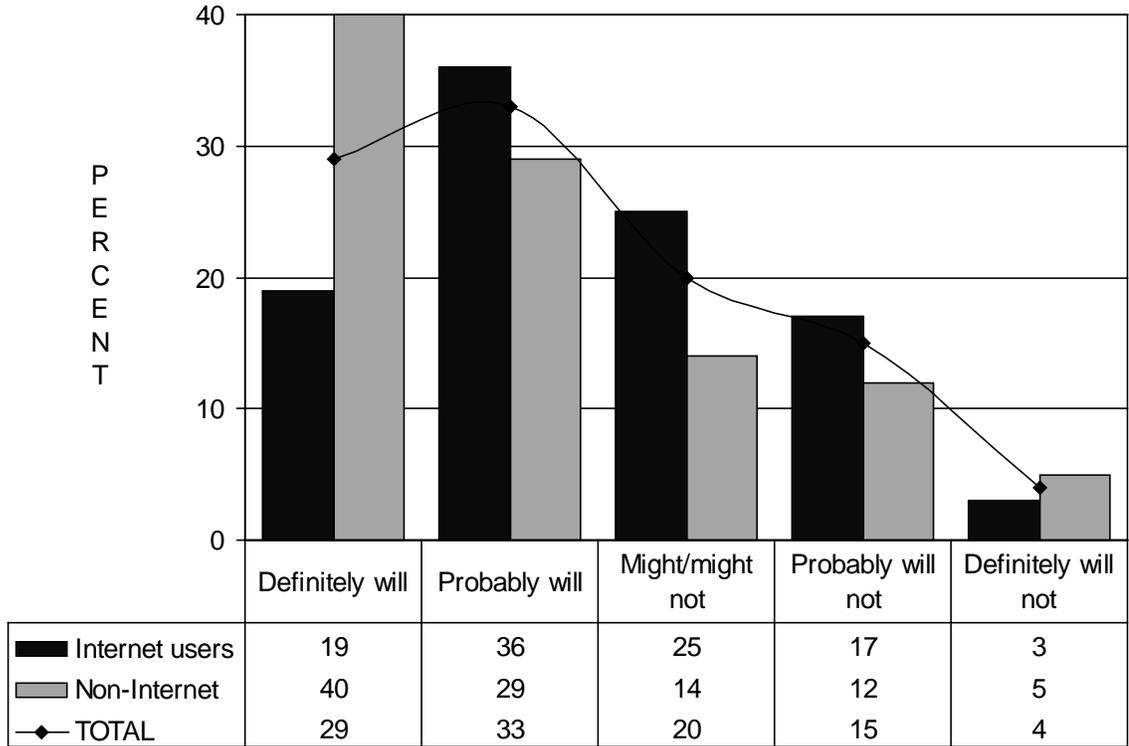


FIGURE 66
Why Not Completely Satisfied With Visit
(Among Those Who Were "Somewhat" Satisfied)



Visitors who were not completely satisfied with their visit were asked to volunteer why (Figure 66). Internet travel planners were significantly more likely than non-Internet users to say they thought Las Vegas was too expensive (15% vs. 5%). Non-internet users were more likely than Internet travel planners to say it was because they were in town on business, not pleasure (18% vs. 4%).

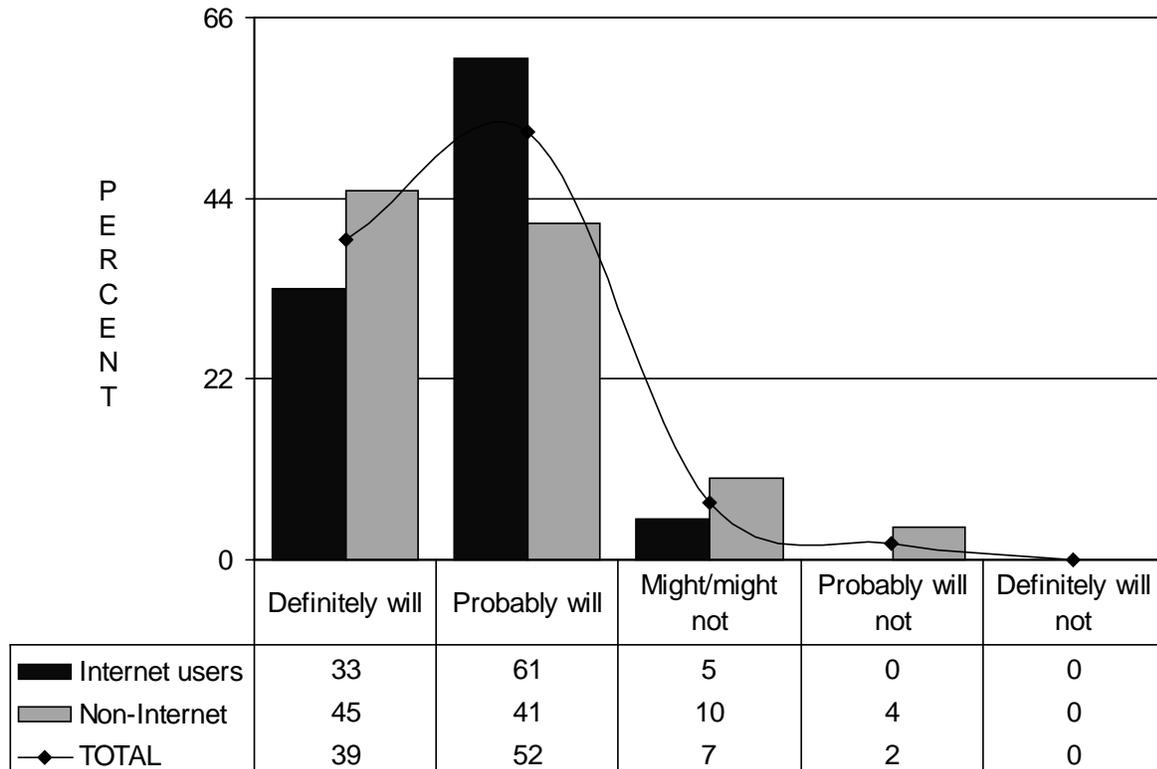
FIGURE 67
Likelihood Of Returning To Las Vegas Next Year*



Visitors were asked how likely they are to return to Las Vegas the following year (Figure 67). Non-Internet users (69%) were significantly more likely than Internet travel planners (55%) to say they “definitely” or “probably” will return. Internet travel planners were significantly more likely than non-Internet users to say they “might or might not” return in the next year (25% vs. 14%) or that they “probably will not” return (17% vs. 12%).

* These results are from 2011. This question was discontinued in 2012.

FIGURE 68
Likelihood Of Recommending Las Vegas To Others*



Visitors were also asked how likely they are to recommend Las Vegas to others (Figure 68). The likelihood of recommending Las Vegas to others was higher among Internet travel planners (94% “definitely” or “probably” will recommend) than among non-Internet users (86%). Non-Internet users were more likely than Internet travel planners to say they “might or might not” recommend Las Vegas (10% vs. 5%), or that they “probably” will not recommend Las Vegas to others (4% vs. less than 1%).

* These results are from 2011. This question was discontinued in 2012.

VISITOR DEMOGRAPHICS

In terms of visitor demographics, Internet travel planners were significantly more likely than non-Internet users to be (Figures 69 and 70):

- Female (51% vs. 47%).
- Employed (74% vs. 60%) and less likely to be retired (13% vs. 28%).
- More educated (54% are college graduates vs. 49% of non-Internet users).
- Single (21% vs. 14%) and less likely to be married (73% vs. 78%).
- Younger (average age of 42.5 years vs. 48.2 years for non-Internet users).
- White (78% vs. 72%).
- Earning household incomes of \$100,000 or more (28% vs. 24% of non-Internet users).
- From the South (13% vs. 8%) or the Midwest (14% vs. 6%) — but less likely to be from the West (48% vs. 63%) — especially Southern California (28% vs. 40%).

FIGURE 69
VISITOR DEMOGRAPHICS

	Internet Users	Non-Internet	TOTAL
<u>GENDER</u>			
Male	49%	53%	51%
Female	51	47	49
<u>MARITAL STATUS</u>			
Married	73	78	75
Single	21	14	18
Separated/Divorced	5	5	5
Widowed	1	3	2
<u>EMPLOYMENT</u>			
Employed	74	60	69
Unemployed	3	2	2
Student	6	3	5
Retired	13	28	19
Homemaker	4	6	5
<u>EDUCATION</u>			
High school or less	11	21	15
Some college	29	26	28
College graduate	54	49	52
Trade/vocational school	6	4	5
<u>AGE</u>			
21 to 29	22	13	19
30 to 39	25	21	24
40 to 49	22	21	21
50 to 59	16	15	16
60 to 64	6	7	6
65 or older	9	23	15
MEAN	42.5	48.2	44.8
BASE	(2146)	(1453)	(3602)

(Continued on next page)

FIGURE 70
VISITOR DEMOGRAPHICS

(Continued/2)

	Internet Users	Non-Internet	TOTAL
<u>ETHNICITY</u>			
White	78%	72%	75%
African American/Black	5	6	5
Asian/Asian American	7	11	9
Hispanic/Latino	8	9	8
Other	3	3	3
<u>HOUSEHOLD INCOME</u>			
Less than \$20,000	3	2	3
\$20,000 to \$39,999	6	5	6
\$40,000 to \$59,999	17	18	17
\$60,000 to \$79,999	24	29	26
\$80,000 to \$99,999	15	15	15
\$100,000 or more	28	24	26
No Answer	7	7	7
<u>VISITOR ORIGIN</u>			
<u>U.S.A.</u>	<u>83</u>	<u>83</u>	<u>83</u>
Eastern states*	8	6	7
Southern states†	13	8	11
Midwestern states‡	14	6	11
<u>Western states§</u>	<u>48</u>	<u>63</u>	<u>54</u>
California	<u>28</u>	<u>40</u>	<u>33</u>
Southern California	22	34	26
Northern California	7	7	7
Arizona	5	9	6
Other West	15	14	15
<u>Foreign</u>	<u>17</u>	<u>17</u>	<u>17</u>
BASE	(2146)	(1453)	(3602)

* 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.